



## Creating a Text-Based Low-Stock is.group P/O

Custom report formats make it nearly as easy to create a Low-Stock P/O for in text-based software as it is in the graphical Purchasing application. With the Version 7 General Release, customized low-stock reports have been limited to is.group items.

**Note:** Since the graphical Purchasing application streamlines the process of building a low-stock P/O, graphical users do NOT need to catalog or use the is.group Low-Stock report selectors. For detailed instructions on using the graphical Purchasing application for is.group orders, see “Loading & Purchasing is.group Items” documentation at [www.ddms.com/resources/support/faq/opus/opus-iseztradedoc.pdf](http://www.ddms.com/resources/support/faq/opus/opus-iseztradedoc.pdf)

To be able to use these reports, you must first catalog the is.group Low-Stock report selectors in the (LR) Inventory Standard Reports screen. Then you can run one of the custom low-stock reports from the (R) Inventory Selectors report screen, just as you would the original Min/Max and Cycle Count low-stock reports. Once the report selector creates the low-stock file, you can build a low-stock P/O using the short-buy process. Detailed instructions are below.

### Text-Based is.group Low-Stock Report Selectors

Six report selectors allow you to limit your Low-Stock reports (and the resulting purchase orders) using the vendor stocking fields in the (I-MFG) Direct Buy record that indicate whether an ISG item is stocked or non-stocked. Using Min/Max and Cycle Count Low-Stock report formats as a basis, the six selectors include three variations for each low-stock calculation program. You can limit your Low-Stock report to all ISG items, and sort and subtotal based on the new vendor-stocking field (ISG stocked or non-stocked). Or you can run separate Low-Stock reports on stocked or non-stocked ISG items, to create separate P/Os for each type of item.

Calculation Type	Selector Name	Description
Min/Max	IS-LW1	Min/max report for all ISG item records, sorted and subtotaled by stock code.
	IS-LW2	Min/max report for all ISG items with the Vendor Stock code of N (non-stocking).
	IS-LW3	Min/max report for all ISG items with the Vendor Stock code of S (stocking).
Cycle Count	ISGCY1	Cycle count report for all ISG item records, sorted and subtotaled by stock code.
	ISGCY2	Cycle count report for all ISG items with the Vendor Stock code of N (non-stocking).
	ISGCY3	Cycle count report for all ISG items with the Vendor Stock code of S (stocking).

**Note:** Although IS-LW1 and ISGCY1 will sort and subtotal the Low-Stock report by the vendor stocking field, any resulting P/O will be sorted alphanumerically by item number, as always. While you can have all six selectors available, you can reduce confusion and operator error by cataloguing only a few selectors that apply to your purchasing process.



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## Cataloguing Text-Based is.group Low-Stock Report Selectors

You must first catalog the is.group Low-Stock report selectors in the (LR) Inventory Standard Reports screen. Doing so ensures that these selectors will be available to anyone who can access the (R) Inventory Selectors report screen. To catalog the new is.group Low-Stock selectors:

1. Go to the (LR) Inventory Standard Reports screen.
2. Select the Change action code by typing **C**
3. At G/L Location, specify a new location or accept the default location by pressing **TAB**.
4. Press **Tab** until the cursor moves to a blank line.
5. Enter the selector name you wish to use.
6. Once you fill the field, the selector name and title will be displayed at the bottom of the screen, along with the **Catalog This** prompt, as shown below.
  - If you want to catalog the selector, type **Y**.
  - If you do not want to catalog the selector, type **N**.
7. When you have catalogued a selector, the cursor moves to the next line, so that you can enter another selector. Repeat **Steps 5-6** until all selectors that you want to catalogue have been catalogued.
8. Press **Enter**. The cursor will return to the action code field.
9. Press **Esc** twice to the return to the Master Menu.

```

16:45:35          (LR)  INVENTORY STANDARD REPORTS          06/23/04
=====
          ACTION [C] (C=CHANGE, I=INQUIRY)   G/L LOCATION [ 1]
=====
SELECT SUBTITLE DESCRIPTION                                REPORT TITLE
-----
IS-LW1 ISG LOWSTOCK ALL ITEMS                          ISG LOW-STOCK MIN/MAX ALL ITEMS
ISGCY1

ISGCY1 ISG CYCLE LOSTOCK ALL ITEMS                      CATALOG THIS Y/N ?Y
    
```



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### Creating a Text-Based Low-Stock File

Once you have cataloged an is.group Low-Stock report selector, you can access it from the (R) Inventory Custom Report Selectors screen. You use the new selectors just as you would the original Min/Max and Cycle Count low-stock reports.

1. In the (R) Inventory Selectors screen, enter the number in the Selector field that corresponds to the report you want to print.
  - If you do not find the is.group selectors on this page, press Enter to go to the next page.
  - If you do not fill the Selector field, press Enter.
2. At the Do You Wish To Change All, Change Printer, or Execute prompt, type **P**

**Note:** You can type A to make changes to the body of the inventory report before changing the print line. See “Changing the Body of an Inventory Report” in online help at [www.ddms.com/resources/help/reportsmenu/Changing\\_the\\_Body\\_of\\_a\\_n\\_Inventory\\_Report.htm](http://www.ddms.com/resources/help/reportsmenu/Changing_the_Body_of_a_n_Inventory_Report.htm)

3. In the Loc field, specify a new location or accept the default location by pressing TAB. To print a report with totals with a single total for all locations, space through the default location and leave the Loc field blank. To print separate totals for each location, enter **00**.
4. Tab to the Prt field, and enter the printer where you wish to print the low-stock report.
5. Tab to the Lowstock field and type **LOSTOCK-IS**, for example, as shown in the following figure. If the filename is not long enough, press the space bar to fill the remaining characters in the field. Press Enter.

```

10:56:59          (R) INVENTORY SELECTORS    rev. (06/13/03)          06/24/04
Number    Report: IS_LOW          Selector: IS-LW1
 18 = ISG LOW-STOCK MIN/MAX ALL ITEMS    ISG LOWSTOCK ALL ITEMS
 19 = ISG LOW-STOCK MIN/MAX ALL ITEMS    ISG LOWSTOCK LIMITED TO V.STOCK = N
 20 = ISG LOW-STOCK MIN/MAX ALL ITEMS    ISG LOWSTOCK LIMITED TO V.STOCK = S
 21 = ISG CYCLE WEEKS LOWTOCK REPORT     ISG CYCLE LOSTOCK ALL ITEMS
 22 = ISG CYCLE WEEKS LOWTOCK REPORT     ISG CYCLE LOWSTOCK V.STOCK FLAG = N
 23 = ISG CYCLE WEEKS LOWTOCK REPORT     ISG CYCLE LOWSTOCK V.STOCK FLAG = S
 24 =
 25 =
 26 =
 27 =
 28 =
 29 =
 30 =
 31 =
 32 =
 33 =
 34 =

Lowstock [LOSTOCK-IS] Weeks [10] Dpt Pricing (MN WX PQ) [P] Up Qty [ ] Up Rec[ ]
[18] Selector Totals Only :N Loc :    Prt :P1 Copies : 1 Recs :    Chain :
ENTER PRINTER/COPIES/RECORDS

```



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6. At the Do You Want MinMax/Cycle/Both For File prompt:
  - Type M to use calculations based on Minimum, Maximum, On-Order, and On-Hand quantities in item history.
  - Type C to use the Cycle Count calculations based on sales history and the length of time between purchase orders.
  - Type B to use a combination of calculations.
7. At the Do You Want To Save All Items In LOWSTOCK prompt, type Y
8. At the Do You Wish To Save Your Selections, type Y
9. At the Enter New Selector prompt, press Enter.
10. At the Enter New Title prompt, make any desired changes and press Enter.
11. At the Are You Sure prompt, type Y
12. When the cursor returns to the Selector field, press Esc to return to the Main Menu.

**Note:** For more information, see “Changing the Inventory Print Line” in online help at [www.ddms.com/resources/help/reportsmenu/Changing\\_the\\_Inventory\\_Print\\_Line.htm](http://www.ddms.com/resources/help/reportsmenu/Changing_the_Inventory_Print_Line.htm)

The Low-Stock Report is shown below.

D.D.M.S. INC. P.O. BOX 507 KELLER	TX 76248	IS Group MIN/MAX REPORT FOR LOCATION ( )	DATE 06/24/04 TIME 18:24:22 PAGE 1
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S	ITEM NUMBER	CO.	DESCRIPTION	UNITS	COST	L-YEAR	Y-T-D	MIN:	MAX:	HITS	NEED	ON-ORD	O-HAND	BACKOR	ORDER
S	38450B	ACC	BNDR, D-RING, 11	EA	1	161.130		5	10		10				10
161.300															
Total Cost = 161.300															
Total Of Items To Purchase = 1															

## Recalculating Low-Stock Order Quantities to Meet is.group’s Required Buy UOM

When you transmit a purchase order, the is.group system analyzes order quantities, and takes certain actions when they do not match is.group’s required buy UOM. This is from the FAQ #32 of the is.group Distribution Manual:

32. What if I make a mistake on the order? For example, what if I ordered 4 boxes of file folders and the case qty is 5.

If a dealer orders less than case quantity, the order will be rejected if received via EDI.<sup>1</sup> If a dealer orders more than case quantity (for example, if the dealer ordered 6 boxes and the case quantity is 5), is.group’s system will round down to the case quantity and reject the unit overage. Depending on the product, dealers will order in various units of measure. However, only orders for case quantities will be accepted. ... Dealers can order in “each”, but is.group will round down to the case level and reject the overage.

<sup>1</sup> For DDMS customers, the is.group PSN transmits P/Os via EDI.



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As a result, the quantities you receive from is.group may not match the order quantity on the P/O, and may not fill your minimum stock quantities. In some cases, rejected line items may cause problems meeting is.group's minimum order requirements. To avoid these discrepancies, recalculate order quantities to multiples of is.group's buy UOM by following these steps:

1. Use the Low-Stock report, to compare each line item's Order quantities (the last column on the right) to the is.group's required Buy UOM, shown in the Direct Buy record of the (E) Inventory Master record.
2. Your order quantity must be divisible by is.group's required buy unit of measure and case quantity.

You can adjust order quantities when you create a P/O from the Low-Stock file, next.

### Creating a Text-Based P/O From Low-Stock

Once you have created the Low-Stock file, you can build a P/O.

1. In the (F) Purchase Order Entry screen, select the [S] Short Buys action code.
2. At the File To Use For Short Buys prompt, enter the name of the low-stock file, LOSTOCK-IS, for example. If the filename is not long enough, press the space bar to fill the remaining characters in the field.

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**Note:** If the specified file does not exist, the cursor returns to the action code field. You may have to re-run the in the (R) Inventory Selectors screen.

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3. In the Inv Loc field, specify a new location or accept the default location by pressing Enter.
4. In the Vendor # field, type **ISG** and press Enter.
5. At the Correct Record prompt, press Enter or type **Y**
6. At the Current P/O # field:
  - Press Enter if your (LF) Purchase Order Parameters are set up to automatically assign the next P/O #, or
  - Enter a unique or existing purchase order number to assign for this P/O and press Enter.
7. If the Have P/O ... Continue prompt appears:
  - Type Y to add the is.group low-stock P/O to the existing P/O.
  - Type N to specify a new P/O number.

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**Note:** If the existing purchase order has been ended, you can add to it only if you specify Y in the Allow Adding On To P/O's That Have Been Ended field in the (LF) Purchase Order Parameters screen.

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8. The Short-Buys Window appears, as shown in the following figure.

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18:52:59          (F) Purchase Order Entry rev. (04/30/04)          06/24/04
-----
Action [S]      Inv Loc [ 1]   File [PO-MASTER ] Vol [W3??]
Vendor #ISG      Contact :          Phone # - -
Name :          Fax # - -          R.Phone #...-...-....
Street :          Account #          Last P/O # 30001
City :          State : Zip # -          Current P/O # 30002
----- Total Weight #          $          ----- Due Date : / /
STOCK NUMBER    CO.    DESCRIPTION          UNIT C  ORDER RECEIV ACK. NBR.
*****
*          Entire Short-Buy for P/O Y/N ?N          *
* Assign Pick Ticket Numbers Y/N ?Y Include Specials Y/N/D/Prompt ?P *
* Only Items for Classes From #. To #. (Blank=All Classes)          *
* Only Items that Match Vendor ? [.....] (Blank=All Vendors)          *
* For C=Company, M=Mfg., W=Vendor ID, P=Program, V=Pur. Ven. ID ?.          *
* Dollar Limit for Building P/O $..... (Blank=No Limit)          *
* Update "I-PRICE" List with List Price Changes Y/N ?.          *
* Reset "MFG/WHL" Cost Y/N ?Y (Only if Vendor Matches)          *
* Check for Economic Buy Y/N ?N Economic Contract to Use [ ]          *
* Use Vendor Contract Range [ ] to [ ] Y/N ?_          *
* Contract to Use Cost From [..]          *
*****
    
```

9. At the Entire Short-Buy for P/O prompt:

- Press Enter or type N to examine and if necessary adjust individual line items before the system adds them to the P/O.
- Press Y to automatically place all items within specified limits on the P/O.

**Note:** If you examine individual line items (by typing N at the Entire Short-Buy for P/O prompt), it gives you an opportunity to adjust order quantities to meet is.group’s required buy unit of measures (UOM). The is.group system is designed to round down or reject order quantities that do not equal the buy UOM. In some cases, these discrepancies may cause problems meeting is.group’s minimum order requirements.

10. Complete the remaining prompts on the Short-Buys window. For more information, see Section 3: Creating Purchase Orders through the Short-Buy Process, in “Chapter 2: The Short-Buy Process” of *Book V: Purchasing and Communications*. It is available at [www.ddms.com/resources/doc/standard\\_doc/Standard/bk5purch/bk5cho2.pdf](http://www.ddms.com/resources/doc/standard_doc/Standard/bk5purch/bk5cho2.pdf)

11. At the Enter Starting Item Number or Return for All prompt, press Enter.
12. If you set the Entire Short-Buy for P/O prompt to examine individual line items, the Item Ordering window appears, showing the item’s list price, cost, and ordered quantity, as shown in the following figure.



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```

18:52:59          (F) Purchase Order Entry rev. (04/30/04)          06/24/04
-----
Action [S]      Inv Loc [ 1]   File [PO-MASTER ] Vol [W3??]
Vendor #ISG      Contact :          Phone # - -
Name :          Fax # - -          R.Phone #...-...-....
Street :          Account #          Last P/O # 30001
City :          State : Zip # -          Current P/O # 30002
----- Total Weight # _____ $ _____ Due Date : / /
STOCK NUMBER  CO.  DESCRIPTION  UNIT C  ORDER RECEIV ACK.  NBR.
38450B        ACC  BNDR,D-RING,11X8.5,5",BK  EA W  O/O=  O/H=

Vendor :ISG      Prefix :WLJ  Buy Unit :EA of : 1 Bin (P) : (S) :
Pick # [      ] List [ 50.270] Cost [ 16.130] Order [ 10] Recv [      ]
INCLUDE THIS ITEM Y/N/D/O ?Y
    
```

**13. At the Include This Item prompt:**

- Type Y to include this item in the current P/O. The cursor moves to the Order field, so you can change quantity. When you are finished, press Enter. The item will be deleted from the Low-Stock file, to prevent it from being placed on another P/O.
- Type N to exclude the item from the current P/O. It will remain in the Low-Stock file so that you can place it on another P/O.
- Type D to delete the item from the file. It will no longer be included on the current P/O.

14. If a line item's order quantity does not meet the vendor's buy UOM, the system will display the Accept Qty prompt. The Accept Qty field will display a multiple of the buy UOM, if the Round Quantities When Needed field is set to U or D in the (LF) Purchase Order Parameters screen.

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**Note:** We do NOT recommend changing the Round Quantities When Needed field in the (LF) Purchase Order Parameters screen just for is.group low-stock P/Os, since it can adversely affect your wholesaler communications.

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- Press RETURN or type Y to adjust the line item's order quantity to meet the buy UOM increments at the time of transmission.
- Type N if you do not want to increase or decrease the order quantity at the time of transmission.



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**Note:** If you type Y at the Accept Qty prompt, it does not update the line item's order quantity on the P/O. It was designed to notify your wholesaler's system *during transmission* that rounding to a multiple of the buy UOM is acceptable. However, the is.group system is designed to round down or reject order quantities that do not match the required buy UOM. In some cases, these rejected line items may cause problems meeting is.group's minimum order requirements. Adjust order quantities to multiples of is.group's buy UOM before ending the P/O.

15. In the DUE DATE fields, enter the date that you expect to receive the order.
16. When the system has finished adding items from the file to the purchase order, the cursor returns to the action code field, and the END OF SHORT-BUY - ADD ITEMS OR END prompt appears.
17. To add more items, move the cursor to the Stock Number field and enter the data for additional items.
18. To adjust order quantities on existing items, move the cursor to the Stock Number field enter the affected Stock Number.
19. At the Correct Record prompt, you can type V to view the Multiple Vendor screen to check the required Buy UOM, and press Esc to return to the P/O Entry screen with the Correct Record prompt.
20. When you type Y, the cursor moves to the order quantity field to allow you to make the adjustment.
  - To increase quantity, enter the amount to be added to the current Order quantity to bring it up to the required quantity.
  - To decrease quantity, enter a minus sign and the amount to be subtracted from the current Order quantity to bring it down to the required quantity.
21. Press Esc to end the purchase order, or move the cursor to the Stock Number field, type **END** and press Enter.

### Additional Information

For more detailed information, see Section 3: Creating Purchase Orders through the Short-Buy Process, in "Chapter 2: The Short-Buy Process" of Book V: Purchasing and Communications. It is available at

[www.ddms.com/resources/doc/standard\\_doc/Standard/bk5purch/bk5cho2.pdf](http://www.ddms.com/resources/doc/standard_doc/Standard/bk5purch/bk5cho2.pdf)

To further customize the IS\_LOW min/max report format or the ISGCYC cycle count report format using Report Writer, see the "Report Basics" online help topic at

[www.ddms.com/Resources/help/reportsmenu/Report\\_Basics.htm](http://www.ddms.com/Resources/help/reportsmenu/Report_Basics.htm)