Replenish Stock - How To's

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Replenish Stock – How To

Overview

The **Replenish Stock** tool helps determine which items need to be purchased or transferred between warehouses and how much inventory is needed.

The calculation uses information such as:

- Past sales history
- Lost sales
- Current inventory
- Open/backordered sales
- Inventory already on purchase orders
- Min/Max inventory levels
- Future stock requirements
- Vendor costs and quantities
- Warehouse availability

Depending on the selected **Calculation Method**, Replenish Stock can be used to:

1. **Calculate & Display a List of Items to BUY**

2. **Calculate & Display a List of Items to TRANSFER**

The tool is designed to help users make purchasing and inventory decisions based on actual sales and inventory data rather than manually reviewing each item.

Accessing Replenish Stock

From the main 1place menu:

Purchasing → Replenish Stock

The first option asks:

What do you want to do? (Calculation Method)

Available options are:

- **1. Calculate & Display a list of Items to BUY**
- **2. Calculate & Display a list of Items to TRANSFER**

Select the appropriate option to begin the analysis.

Understanding the Stock Replenishment Calculation

When using **Past Sales History**, 1place estimates how much inventory may be needed during the selected future

period based on what was sold during the selected historical period.

For example, suppose you want to maintain approximately a **90-day supply**.

Example

During the selected past sales period:

- Gross quantity sold = **115**
- Lost sales = **5**

Therefore:

115 + 5 = 120

The **Net Quantity Sold in Range** is 120.

If the historical period covers **365 days** and the future supply period is **90 days**:

90 ÷ 365 = 24.66%

Therefore, approximately 24.66% of the historical sales quantity is projected for the future 90-day period:

120 × 24.66% = 29.59

This is approximately **30 units** needed for the future period.

The system then considers inventory that is already committed or available.

For example:

Calculation	**Quantity**
Estimated quantity needed	30
Sales Order backorders	+5
Required quantity	**35**
Current inventory	-2
Inventory already on PO	-12
Adjusted quantity needed	**21**

If the item must be purchased in case quantities of **8**, the required quantity is rounded up to the next complete case:

21 → 24

Therefore, the recommended quantity to purchase is **24 units**.

> **Important:** The actual results will depend on the criteria selected and the item's sales, inventory, backorder, PO, Min/Max, and vendor information.

Selecting the Analysis Method

After selecting the calculation method, the **Analysis Method** becomes available.

The available options are:

- **Past Sales History**
- **Min/Max**

- **Intercompany Stock Transfer**

Each method uses a different approach to determine inventory requirements.

Past Sales History

The **Past Sales History** method calculates future inventory requirements based primarily on historical sales.

This is useful when you want to estimate how much inventory should be available for a future period based on previous sales activity.

The screen provides several criteria that can be used to control the calculation.

Past Sales History Date Range

Select the historical date range that should be analyzed.

Choose a period that best represents the type of sales you expect in the future period.

For example, if your business has seasonal sales, you may want to compare the upcoming season with a similar period from the previous year rather than using a completely unrelated period.

Future Amount (to have on shelf)

Specify how much inventory you want to have available in the future.

For example:
- **3 Months**
- **90 Days**
- **45 Days**
- **2 Weeks**

The system uses this future period together with the selected historical period to estimate how much inventory may be required.

Additional Criteria

The Past Sales History analysis includes additional options that can provide more information or broaden the calculation.

Calculate Last 3 Month, 1 Year, 2 Years and 3 Years Quantities

When selected, the results include additional historical sales quantities for comparison.

This can be useful when reviewing longer-term sales trends.

Calculate Last PO Cost, Last PO Received Date

Includes information about the item's most recent purchase order cost and received date.

This can help when reviewing purchasing history and vendor pricing.

Show Min/Max for parts that have a "Date Added" within the past X days

This option allows Min/Max information to be considered for newer items that may not have sufficient sales history.

Enter the number of days to use when determining which items are considered newer.

This is particularly useful for new items that have little or no historical sales.

Include "Lost Sales" in Sales History figures

When enabled, lost sales are included in the sales-history calculation.

This allows the replenishment calculation to account for potential sales that were not fulfilled because the item was unavailable.

Show All Active Items in Item table

Displays all active items, including items that the calculation determines do not currently need to be reordered.

This can be useful when you want a more complete inventory review rather than only seeing items that require replenishment.

Vendor Comparison

The **Vendor Comparison** section allows you to compare vendor pricing while reviewing the items that need to be purchased.

You can select up to **four vendors**.

Each vendor can also have a title entered for easier identification in the results.

This allows you to compare vendors side by side before deciding where the inventory should be purchased.

Running the Calculation

After selecting the desired criteria, click:

Show Parts To Buy

Before the results are generated, 1place may display a confirmation asking whether you want to include **Sales Order backorders** in the calculation.

The confirmation will identify the number of sales orders and items currently on backorder.

If you enter **YES**, the backordered quantities will be included in the replenishment calculation.

If you do not include them, the backorders will not be considered in the calculation.

Reviewing the Results

After the calculation is completed, 1place displays the items identified by the replenishment analysis.

The results can include information such as:

- Item Number
- Item Description
- OEM Number
- Aftermarket Item Number
- Date Added
- Category
- Sub Category
- PO Category
- Orders
- Sold
- Lost
- QBO
- QIS
- QPO
- Min
- Max
- 3M
- Y1
- Additional historical quantities, depending on the criteria selected

The results also provide totals such as:

- **Total Qty to Buy**
- **Total Cost**
- Vendor-specific totals

Understanding some of the inventory quantities

The exact columns displayed may vary depending on the selected criteria, but the results are intended to show the information used to determine the replenishment requirement.

For example:

- **Sold** – quantity sold during the applicable sales-history period.
- **Lost** – lost sales included in the analysis when the option is enabled.
- **QBO** – quantity associated with sales orders/backorders.
- **QIS** – quantity currently in stock.
- **QPO** – quantity already coming from purchase orders.
- **Min** – item's minimum/reorder level.
- **Max** – item's maximum/target stock level.
- **3M / Y1 / Y2 / Y3** – additional historical sales quantities when those calculations are enabled.

Filtering and Sorting the Results

The results screen provides options to make the list easier to review.

Filter for Item

Enter an item number or other applicable item information to narrow the displayed results.

Filter for Category

Use this field to filter the results by item category.

Pre-Sort List By

The results can be pre-sorted using the available sorting options.

For example:

Qty to Buy (descending)

This places items with the highest recommended purchase quantity first.

After changing the criteria, click:

Re-Display Criteria

to refresh the displayed results.

Additional Functions

Automated Functions

The **Functions** button provides several automated tools for working with the replenishment list.

Click **Functions** to open the **Automated Functions** window.

The available functions are:

1. Export ALL Items on List to Excel

Exports the replenishment list to an Excel spreadsheet.

This can be useful for reviewing or modifying the information outside of 1place.

2. Auto Fill the Vendor Qty to Buy

Automatically assigns the recommended purchase quantity to the vendor with the lowest cost.

Important: Vendors with a cost of **$0** are ignored when comparing prices.

If all selected vendors have a cost of $0, the quantity will be assigned to the **first selected vendor**.

3. Unselect All Vendor Qty's

Resets the vendor quantities to buy back to **0**.

This allows you to clear the current vendor assignments and manually make new selections.

4. Import Vendor Costs from Excel Spreadsheet

Allows vendor costs to be imported from an Excel spreadsheet.

This is useful when vendor pricing has been received externally and needs to be loaded into the replenishment list.

5. Update Vendor Costs

Updates the vendor costs displayed on the replenishment list using the current vendor costs stored on the item's Item Detail record.

Exporting and Importing Replenishment Data

The results can be exported to Excel for additional review or modification.

Click:

Export to Excel

After making changes to the spreadsheet, the information can be brought back into 1place using:

Import from Excel

This can be useful when purchasing staff need to review quantities, vendor selections, or costs before creating purchase orders.

Saving a Replenishment List

If you want to return to the results later, you can save the replenishment list.

Click:

Save List for Later

Enter the appropriate **name** and **description** for the list.

The saved list can later be accessed using:

Load Saved List

This is useful when you want to preserve a particular replenishment analysis rather than running the calculation again.

Creating a Purchase Order or Request for Quote

After reviewing the replenishment results, click:

Proceed

The **Auto Create PO or Request for Quote (RFQ)** window will appear.

From this window, you can select the vendor and review information such as:

- Number of items
- Number of units
- PO total

Requesting a Vendor Quote

To request pricing from a vendor:

1. Select the vendor.
2. Select **Request for Quote (RFQ)**.
3. Enter the vendor's email address or email addresses.
4. Proceed with the request.

1place will generate the list of items to be quoted and open the email process.

Importing Vendor Price Quotes

After receiving vendor pricing, the vendor costs can be imported into the replenishment list.

1. Click **Functions**.
2. Select **4 - Import Vendor Costs from Excel Spreadsheet**.
3. Click **Execute**.
4. In the Import Wizard, select:
    - **Import Type:** Vendor Item Numbers (1 Vendor)
    - **Item Vendor:** Select the appropriate vendor
    - **File Name:** Browse for the Excel file
5. Select **Import New Records** as applicable.
6. Map the spreadsheet columns to the appropriate 1place fields.
7. Click **Proceed**.

The imported vendor costs can then be used when reviewing the replenishment results and determining which vendor should receive the purchase order.

Creating Purchase Orders

Once the quantities and vendors have been reviewed:

1. Click **Proceed**.
2. The **Auto Create PO or Request for Quote (RFQ)** window will appear.
3. Select the vendor.
4. Review the number of items, units, and PO total.
5. Select **Create PO**.

6. Click **Proceed**.

1place will create the Purchase Order and open the newly created PO.

Using Min/Max for Stock Replenishment

The **Min/Max** analysis method is useful when items have established inventory levels instead of relying primarily on historical sales.

A Min/Max setup establishes:

- **Min (Reorder Point):** The inventory level at which additional stock is needed.
- **Max (Stock Level):** The target inventory level to replenish the item back to.

Example

Suppose an item has:

- Min = **4**
- Max = **8**
- Current inventory = **4**

The item is at its minimum level, so the system determines that it needs enough inventory to reach the maximum:

8 - 4 = 4 units

Therefore, the replenishment quantity is **4 units**, subject to other applicable inventory already coming in or otherwise accounted for by the calculation.

If the item has:

- Min = **4**
- Max = **8**
- Current inventory = **2**

Then:

8 - 2 = 6 units

The system would determine that **6 units** are needed to bring the inventory back to the Max level.

Why Min/Max is useful

Min/Max can be particularly useful for:

- New items with little or no sales history
- Frequently stocked items
- Items where the business has established desired inventory levels
- Items where historical sales alone may not accurately determine the required stock level

The additional Min/Max criteria can also be used to analyze newer items that may not yet have enough sales history.

Setting Up Min/Max Values

Min and Max values can be updated in bulk using Excel.

Export the Item List

1. Open **Item List**.
2. Click the **gear/settings** button.
3. Configure the list to include:
    - Item
    - Description
    - Type
    - Min (Reorder Point)
    - Max (Stock Level)
4. Use the column-header checkbox to select the records.
5. Select **Select all records on this ENTIRE LIST**.
6. Click the **Download to Device** icon.
7. Confirm the download.

The resulting Excel file can be used to review and update the Min and Max values.

Update Min/Max in 1place

After updating the spreadsheet:

1. Return to **Item List**.
2. Click the **Upload to 1place** icon.
3. In the Import Wizard, select:
    - **Import Type:** Item List
    - **File Name:** Select the updated Excel file
    - **Update Existing Records**
4. Map the spreadsheet columns.
5. Make sure the required fields are mapped, including:
    - Item Number
    - Type

- Min (Reorder Point)
- Max (Stock Level)

6. Click **Proceed**.

The Min and Max values will be updated on the applicable Item records and can then be used by the **Min/Max** replenishment analysis.

Intercompany Stock Transfer

The **Intercompany Stock Transfer** analysis is used when inventory should be transferred between warehouses instead of purchasing additional inventory from a vendor.

This is useful in situations such as:

Sharing inventory between warehouses

One warehouse may be running low on certain items while another warehouse has sufficient stock.

The tool can analyze the inventory requirements of the receiving warehouse and determine which items may be available for transfer from the selected source warehouse.

Moving inventory from an overflow warehouse

Some businesses have a main warehouse that handles sales and one or more overflow warehouses that primarily hold additional inventory.

The tool can identify items needed by the main warehouse and determine whether inventory can be transferred from an overflow warehouse.

Using Intercompany Stock Transfer

1. Open **Purchasing → Replenish Stock**.
2. Under **What do you want to do?**, select:
   2. Calculate & Display a list of Items to TRANSFER.
3. Select the appropriate **Analysis Method**:
   Intercompany Stock Transfer.
4. Select the **Past Sales History Date Range**.
5. Select the **Future Amount** you want to have on the shelf.
6. Select the **Transfer TO Warehouse**.
7. Select the **Transfer FROM Warehouse**.
8. Run the calculation to display the items that may need to be transferred.

The analysis uses the selected warehouse information and sales history to determine which inventory should be considered for transfer.

The resulting stock transfer can then be processed through 1place's warehouse and **Shipping & Receiving** processes.

Tips for Using Replenish Stock

- **Choose your historical date range carefully.** A full year may be appropriate for some businesses, while seasonal businesses may benefit from comparing similar periods.
- **Use a future period that matches your purchasing strategy.** For example, use 90 days if you want to maintain approximately three months of supply.
- **Consider lost sales.** If lost sales are enabled, they can provide a more realistic picture of demand for items that were unavailable.
- **Review backorders.** Including backorders can help account for inventory that is already needed by customers.
- **Use Min/Max for newer items.** New items may not have enough sales history for the Past Sales History calculation to produce a useful result.
- **Compare vendors before purchasing.** Vendor Comparison and the automated vendor-cost functions can help identify lower-cost purchasing options.
- **Review the calculated quantities before creating a PO.** The replenishment calculation is a recommendation based on the criteria selected; purchasing decisions should still be reviewed before the PO is created.
- **Use saved lists for recurring analysis.** Saving a replenishment list can make it easier to return to a previous analysis.
- **Use Intercompany Stock Transfer when inventory already exists elsewhere.** If another warehouse has sufficient stock, transferring inventory may be preferable to purchasing additional inventory.