

2014

ProTrac's Inventory Analysis Program

Way beyond an inventory report

To help our customers gain a better control over their inventory we listened to what they wanted and developed this analysis Program.

Our Customers Wanted

TO Analyze Inventory based on:

- *Customer purchases*
- *Customer Quotes*
- *Special Orders*
- *Standing Orders*
- *Standing Quotes*
- *ALONG WITH -WHAT WAS?*
 - *Already on a submitted Purchase Orders or*
 - *On a Purchase Order that was still in Planning*

ALL DONE WITH

ONE REPORT

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ProTrac's Inventory Needs Analysis

When talking with a distributor there is always a question about what a 4th Generation Relational Data Base Product, like ProTrac, will bring to their operation? The power of a 4GL is evident in our Inventory Order Requirement report. It literally opens up the data base and gives the user instant access to a wide range of sales orders, quotes, purchase orders, and categories.

Situation: For this example your company is selling **Thermostats**. As a distributor you want to ensure that you have the product to cover all of your company's commitments. You need to review **Open Orders, Open Quotes, Standing Quotes** and **Quantity On Hand, Submitted Purchase Orders** and if necessary **Planned Purchase Orders** (PO's in planning, not submitted).

All done on "ONE REPORT"

Using the power of ProTrac's 4GL you bring up your **Order Requirement** report. Make your selections in **Display 1**

The **Blue Add-On Notes** lets you know what each of the sections handles.

This report will look at

- All open orders
- Working quotes by sales rep or by customer account number
- PO's Submitted or
- Planned
- Categories

Display 1

The screenshot shows the 'Order Requirements' window with several sections and callouts:

- Order Selection:**
 - All Open: This group looks at Open Orders
 - By Category
 - By Date Entered
 - By Date Required
 - Display Order Detail: If you are trying to find out who is buying what products on current open orders - See Page 3 of the document
 - Sort By:
 - By Order No
 - By Sales Rep1
 - By Sales Rep2
 - By Sales ID
 - By Acct No
 - Include Quotes: This group looks at Quotes and things that can impact inventory
 - Include Transfers
 - Include Returns
 - Include Deposits
 - Include Labor
 - Include Non Real Items: Kit
- PO Selection:**
 - All Open POs: Open PO's with a lot of flexibility
 - By Category
 - By Date Entered
 - By Date Required
 - Include Planned POs: A planned PO is one that has been created, but not sent to the vendor
- All Inventory
- P/L Range
- Include current on hand to calculate requirement: If you have a customer who has ordered for 3 months from now - On hand does not mean as much as orders that you have to fill next Wednesday. You may run the report without an On Hand column

Buttons: Process, Exit

Footer: Check to display order detail information.

You decide what you want to see on this report, that is the beauty of a 4th Generation Relational Data Base Software Package.

Note: This report just reports, it does not update anything, so you can run it as often as you want.

ProTrac's Inventory Needs Analysis

As a part of this **Analysis Tool** you can determine who has what product on order or on a quote. **Display 3:** This is the same report as Display 2, except this time you have asked for a list of who is buying the products that are listed on Display 2.

Display 3: Who is Buying what Products?

Order Requirements PAGE: 1

Order Selection: By Date Entered - 08/14/2009-08/14/2009
 Include Quotes: No
 Include Transfers: No
 Include Returns: Yes
 Display Order Detail: Yes
 Include Deposits: No
 Include Labor: No
 Include Non Real Items: No
 PO Selection: By Date Entered - 08/14/2009-08/14/2009
 Include Planned POs: No
 Inventory Selection: All Inventory
 Include Curr Inv in Need: Yes

This information is the same only this time purchasing wants to see who ordered what units and do we have enough product to fill today's open orders? With this report you have all of the information that you need to give better customer service. 32nd Street Construction has two orders for this product. The 2nd order for 10 was a total back order.

Summary Line for the Honeywell TH511D1006-1

P/L	Item Number	Description	Qty On Hand	Qty On PO	Cust Qty Ordered	Qty Needed	SPO
HON	TH5110D10061-1	FOCUS PRO 5000 THERMOSTAT	4	13	25	8	

The detail line shows every customer who ordered this product today, how many they ordered, how many are on hand, and how many are on Purchase Orders. This report puts you in charge of Customer Service.

Account	Sls	Sls	Sls	Qty	Ord	Qty	BO	Qty	Ship	SPO
Order No	S	Number	Rp1	Rp2	ID	T				
4457	O	A-ADK01	JON		MDC	S		2		
4458	B	32ND01	SUE		MDC	S		3		
4459	B	ABENT01	SUE		MDC	S		5		
4460	B	ALCAN01	SUE		MDC	S		5		
4461	B	32ND01	SUE		MDC	S		10	10	

P/L	Item Number	Description	Qty On Hand	Qty On PO	Cust Qty Ordered	Qty Needed	SPO
HON	TH5110D10221-1	FOCUS PRO 5000 THERMOSTAT	14	1	25	10	

Account	Sls	Sls	Sls	Qty	Ord	Qty	BO	Qty	Ship	SPO
Order No	S	Number	Rp1	Rp2	ID	T				
4460	B	ALCAN01	SUE		MDC	S		15	1	14
4461	B	32ND01	SUE		MDC	S		10	10	

With this **Analytical Tool** we have tried to replicate our customer's thinking process. By using an **endless variety selection criteria** - you can use this tool for simple reporting, or it will allow you to view your inventory requirements from multiple vantage points.

This **Inventory Analysis Tool** grew out of our customer requests. There are many advantages to a software package that uses a 4th Generation Relational Data Base. One of the biggest advantages is that all information in the application software can be easily accessed by your staff.

Mel - Give me a call to talk about this tool or to visit us and see ProTrac via the Internet.