

The Micro-Management Resupply option within Autosoft FLEX DMS is designed to allow the operator to define re-supply criteria as opposed to the Pearson Resupply which has pre-set values and can not be adjusted.

1. Click **Resupply & Returns** on the Parts Inventory main menu.
2. Click **Set Supply Parameters** on the Resupply & Returns menu.
3. The Source Resupply Setup menu displays the different Resupply options available within ASI DMS. The lower right section of the menu displays sources 1 through 9 and identifies the resupply option selected for each source.
4. Click **Micro-Management** on left side of screen. The Micro-Management Resupply Setup screen appears. This is the first of two setup screens required to initiate the Micro-Management routine.
5. The curser will be blinking in the **OEM Source (1/9):** field. You can type the source number you are setting, or you can press ENTER for source 1, and data will fill in on the screen.
6. You must type Y in Set Micro-Management As Default Re-supply For This Source to continue. If you type N, the system will return you to the Source Resupply Setup menu.
7. **Enable Economic Order Quantities For Stock Orders:**
 - If you type Y, any parts with a cost of up to \$0.50 will be reordered up to a 6 month supply, parts with cost of \$0.51 to \$1.00 will be reordered up to a 4 month supply, and parts with a cost of \$1.01 to \$1.50 will be reordered up to a 3 months supply.
 - If you type N, all parts will be reordered according to the “Low Days/High Days” supply criteria.
8. **Should “Lost Sales” Be Counted As Sales For Stock Orders:**
 - Type **Y** here if “Lost Sales” are flagged only when a customer requests part and leaves without special ordering part and the sale has truly been lost.
 - Type **N** if parts dept. policy is to flag a “Lost Sale” anytime demand is not filled directly from shelf.
9. **Should “Phase In” Parts Be Pulled To Order:**
 - Type **Y** if you desire all parts meeting “Phase In” criteria to be pulled to recommended stock orders. These parts will then filter through resupply “Low/High Days” and “Phase Out” criteria. Also, it is worth noting that ASI currently evaluates “Phase In” parts by sales vs. hits, and this option does not change the stocking status of the part even though recommended to reorder.
 - If you type **N**, the “Phase In” parts will be applied to an exception report for review. After review, the parts can be manipulated accordingly. If you change to a “Y” stock status on the Master Inventory screen, the part will be treated as a stocking part and maintained according to micro-management resupply criteria. If you change to “N” as the stock status, the part will be removed from “Phase In” report and placed on a manual order only status. This may be applied to parts that require a quantity greater than 1 per use which may cause them to “Phase In” prematurely (for example, a sale on head bolts that requires 12 per job). Change to an “S,” and the part will continue to pull to the “Phase in” report for further evaluation.

10. Phase Out With Days Or Hits/Months:

- If you type **D**, the system will suggest a part be re-supplied by “Low/High Days” until the days from last sale is greater than the “Begin Phase Out” days setting.
- If you type **H**, the system will determine “Phase Out” using history for previous amount of sales in prior number of months.

11. Use Basic Sales Level Parameters For All Scans:

- If you type **Y**, all scans will be calculated on the A through F sales level set on following screen, regardless of order, promotion, price symbol, or application codes.
- If you type **N**, you have the ability to set separate “Low/High Days,” Phase In” and “Phase Out” criteria according to promotion, price symbol, and application codes.

12. Days Supply “P” Factor (Usually 3):

- If you have entered D in the **Phase Out With Days Or Hits/Months** field (option 5), this will apply a multiplier to extend “Begin Phase Out” days.
- If you have entered H in the **Phase Out With Days Or Hits/Months** field, this setting is ignored.

13. Once you have completed all the fields on this screen, Click Next. A second screen appears so you can enter your resupply criteria.

Tip: If you click **Fill Defaults**, the screen will default to the preset parameters. You can use these parameters to get you started, or you can enter your own parameters.

14. The **Basic Sales Level** (A through F) is designed to allow you to group parts by the amount of sales in 4 quarters or a perpetual year. These should be set so that A will be the fastest moving parts, and F will be the slowest moving parts. As sales on parts increase or decrease, they will move dynamically through these levels.

15. The **Promotion Code**, **Price Symbol**, and **Application Code** fields allow you to set separate criteria for parts according their value in these fields on the Master Inventory screen.

Note: If you have set the **Use Basic Sales Level Parameters For All Scans** field **Y** on previous screen, these values will be ignored.

16. The **Days Supply** columns allow you to determine how many Low to High days supply of inventory you want to keep on the shelf. As the system calculates each part for re-supply, if the on hand, on order, and back order quantity is less than the high days but greater than the low days required stocking level, no parts are ordered. If they are less than the low days supply, a sufficient quantity to reach high days is suggested for resupply.

17. The **Phase In With** column allows you to set the system to define how many sales in a given amount of quarters are required for an “S” stock status part to either pull to order or phase in report.

Note: This is based on the total sales quantity and not the number of hits or times a part has been sold (for example, headbolts).

18. The **Phase Out With** column has two settings based on how you filled in the **Phase Out With Days Or Hits/Months** field on the previous screen.

- If you set it to D for days, you will be prompted to set **Begin Days** and **End Days**.

For **Begin Days**, each time an order is generated, the system will first calculate the quantity for re-supply based on Low/High days. If a part requires resupply quantity, the system then checks for phase out. If the last sale date is less than the number of days set in the begin phase out, the part is recommended for resupply. If it is greater than the number of days, the system does not recommend it for resupply. If the part is sold again or a lost sale is recorded, the part will cycle back through the process until the last sale or lost sale date is greater than the Begin Days criteria once more.

For **End Days**, once a part has met the Begin Days criteria and is no longer being pulled to order, has an on hand quantity of 0, and has had no activity, Sales, or Lost Sales for greater than the End Days, the part record will be purged from system on the next Month End update of parts inventory system.

- If you set the **Phase Out With Days Or Hits/Months** field to H for hits, the criteria will be determined by **L/Than hits In Months**. This option will evaluate phase out criteria by prior sales history, determined by values set in these fields.

Note: If the value is less than X amount of sales in a given amount of months, the current month is viewed as the first of months looking backward in time. All parts meeting Phase Out criteria, Days, or Hits will be listed on exception report “Testing For Phase Out” each time an order is generated.

The Formula

Each part record is scanned and evaluated. First, Autosoft checks the Reorder At and Stock To fields. If data is present, it adheres to it regardless of stock status or sales history, and the part is resupplied accordingly. If no Reorder At or Stock To values are present, the system checks the stock status. If the status is S, R or L, it checks for phase in criteria and pulls it, if applicable, to the parts testing for phase in report. If the status is C or N, it disregards it and continues. If the stock status is Y, it calculates resupply based on sales and lost sales history. If the part record shows sales and lost sales in 7 months and greater, it calculates 1 year's history plus the last 3 months and adds it together. Then it divides the total sales and lost sales by a 450 day year to determine 1 days supply. It multiplies the 1 day supply by the high days and low days criteria. If the current on-hand quantity, on order, and back order is greater than the low days supply but less than high days supply, it will not order the part. If the quantities are less than low days supply, it will reorder to meet the high days supply quantity. If .3 of a part or greater, it will order 1. If sales and lost sales for the part record are greater than 3 months but less than 7, all being within last 6 months, the total sales and lost sales are doubled and divided by a 360 day year, and the system follows the routine to stock to the high days supply if required. If all sales and lost sales for the part record are within last 3 months, it takes the total of the sales and lost sales and divides it by a 112 day year for 1 days supply and reorders according to low/high days resupply setting.

Important: With the formula laid out, please keep in mind the filtering criteria entered on the initial parameter screen determine whether to pull the phase in parts to the order and whether lost sales should be counted as sales.