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Set Min & Max thresholds to streamline reordering

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Calculate Reorder

Manage your inventory using Min/Max templates to create Orders.

Creating Stock Templates is a great way to manage on-hand inventory. These templates allow you to set inventory thresholds which provide the framework for what should be on-hand and what you need to order.

Original Stock Template

Screen Shot 2022-06-03 at 12.20.36 PM

[How to Create a Stock Template](#)

- Go to the "Calculate Reorder" feature

Screen Shot 2022-06-03 at 12.21.39 PM

- Select the Template

Screen Shot 2022-06-03 at 12.21.23 PM

- Fill out the template then upload

Screen Shot 2022-06-03 at 12.22.16 PM

- Wait for the icon to say "Successful" then confirm order has been sent as-well as other features

Screen Shot 2022-06-03 at 12.31.29 PM-1

Screen Shot 2022-06-03 at 12.31.53 PM-1

Setting Thresholds

The Calculate Reorder tab allows users to set thresholds for what they wish to have in stock, and allows them to set a par of how much they must restock.

Set Thresholds from Product profile

From the Products tab, search for the item you wish to set pars

Locate it and open it

The screenshot shows the 'Edit product' interface. At the top, there's a breadcrumb 'Products > Edit product' and a user profile 'stan andrus Manager'. The 'Min/Max' tab is highlighted with a red box. The product details section includes a product image, name 'Gucci Men's Wedding Band', category 'Ring', item number 'VksDmj', SKU 'RNG-MWGC', and items per case '1'. The price is set to 500. The dimensions section shows size '8', color 'Gold', and weight. The references section has six empty fields. At the bottom right, there are buttons for 'Save as Active', 'Save as Draft', and 'Close'.

Click on the Min/Max tab

- Choose the Location Type for the location(s) you wish to set thresholds, or choose 'All' to include all entity types
- Click the checkboxes on the left
- At the top enter the Min and Max
- Click 'Apply'
- The quantities will be applied to the location(s) and will be 'enabled'

Products > Edit product
Support
stan andrus Manager

Product Details
Images
Min/Max
Status: Active Last Printed SN: 43

Location Type: Store

Min Items: 4
Max Items: 6
Apply

☐	Location	Min Items	Max Items	Enable	Disable if Verified is 0	Disable for Printing if Verified is 0
☒	Store - ACE Hardware	4	6	☒	☐	☐
☒	Store - Kal's Treats & Figs	4	6	☒	☐	☐
☐	Store - WUDS	0	0	☐	☐	☐

Save as Active
Save as Draft
Close

Settings to Disable if Verified is 0 and Disable for Printing if Verified is 0 will be explained in a later article.

- Click "Save as active"

Set from Calculate Reorder

To quickly identify items that have not been assigned a Min & Max click the filter icon

Support
stan andrus Manager

Generate Order

Min*	Max*	Order*
35	55	55
5	10	10
2	5	5
2	5	5

This will open the side filter menu

1. Supplier - Set the supplier filter if products have been assigned a supplier to quickly filter them
2. Limit the items

Filter Menu

Supplier:

Select Supplier

☐ Products with MinMax

☐ Products without MinMax

☒ All Products

☐ Hide if there is no Verified quantity

Show reached Min +

50 %

Apply

Reset to Default

Template Uploader

	A	B	C
1	Sku*	Min*	Max*
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

Update Min/Max Values via Spreadsheet

Instructions on how to update min/max values for products via spreadsheet.

To set min-max values via spreadsheet, navigate to the calculate reorder page and click on the "Get Template" button to download the template excel sheet.

Screen Shot 2022-05-02 at 2.14.10 PM

Next, fill in the required fields. Save the spreadsheet.

Screen Shot 2022-05-02 at 2.04.47 PM

Click on the "Upload Min Max Settings" button.

Screen Shot 2022-05-02 at 2.05.44 PM

Select the location type (DC, Store, or Supplier), and select the specific location you wish to update.

Screen Shot 2022-05-02 at 2.06.17 PM

Upload the saved template and click OK to apply changes.

Screen Shot 2022-05-02 at 2.06.31 PM

Note that this method only updates the specified SKUs at one location.