

OP EXCEPTION REPORT

RUNNING THE REPORT

The OP Exception Report option is used to view items that have an order point exception set up in the system (Product Catalog).

To Access: Purchasing module: **Product Tools** submenu - select the **OP Exception Report** option.


To generate a report of OP exceptions:

1. Use the dropdown list to select the warehouse
2. Use the search window to enter/find a specific product to view OP exceptions (optional). If the Product field is used, the vendor field must remain blank.
3. Use the search window to enter/find a specific vendor to view OP exceptions (optional). If the Vendor field is used, the product field must remain blank.
4. Select whether to show all vendor items or only those marked with OP Exceptions (Exceptional Items).
5. Select the report format HTML, PDF, or Excel.
6. Click **Lookup**.

The screenshot shows the 'OP Exceptions Report' window in Ximple Solutions 2. The window has a title bar with the Xs logo and 'Ximple Solutions, LLC'. The main title is 'OP Exceptions Report' in red. The date and time '09/16/2016 19:04:26' and 'Ximple Support' are in the top right. The window contains several input fields and buttons. The 'Warehouse' field is a dropdown menu with 'All' selected. The 'Product' field is a search box with '***' in the bottom right. Below the 'Product' field is a red 'OR' label. The 'Vendor' field is a search box with 'Arctic Electric' entered and an 'X' in the bottom right. Below the 'Vendor' field are two radio buttons: 'Exceptional Items' (selected) and 'All Items'. Below these are three radio buttons for 'Report Format': 'HTML' (selected), 'PDF', and 'MS Excel'. At the bottom are two buttons: 'Lookup' and 'Close Window'.

OP Exceptions Report	
Warehouse	All ▼
Product	***
OR	
Vendor	Arctic Electric ✕
Show Items	<input checked="" type="radio"/> Exceptional Items <input type="radio"/> All Items
Report Format	<input checked="" type="radio"/> HTML <input type="radio"/> PDF <input type="radio"/> MS Excel
Lookup Close Window	

The OP Exceptions Report List page displays a list of all products/vendors that fit your search criteria. From there you can select to edit a product's order point or to enter the product's catalog and edit the product's information.



Ximple Solutions

OP Exceptions Report List

11/15/2011

14:19:14

User Guide

OP Exceptions Report List

Warehouse	Vendor	Product	Item Type
	Arctic Electric		Exceptional Items

Product	Warehouse	OP (Sys)	Ovrd RPO-OP	OP (User)	Min Stock	Max Stock	Annual Sale	Min Pur Qty	Purch Price	Auto Trnsf In Qty	Stock Item	Invtry Item	Keep in Brch	Rank
AE AE10001 Short Description	MCK	25	Yes	0	50	0	59	1	70.07 EA	1	Yes	Yes		AA
AE AE10001 Short Description	Ellicott	0	Yes	0	200	0	0	1	70.07 EA	0	Yes	Yes		DA
AE AE20001 Short Description	MCK	1	Yes	0	10	0	19	1	1.31 EA	0				BA
AE AE20001 Short Description	BPK	1	Yes	0	10	0	1	1	1.31 EA	0	Yes	Yes		DA
AE AE20001 Short Description	Ellicott	0	Yes	0	300	0	0	1	1.31 EA	0	Yes	Yes		DA
AE AE50008 AE5-8	MCK	0	Yes	0	30	0	0	1	1.31 EA	0				DA
AE AE60087 Short 6-87	MCK	0	Yes	0	4	0	0	1	20 EA	1	Yes	Yes		DA
AE AE90078 9-78 Short	MCK	0	Yes	0	50	0	0	1	13.75 EA	0	Yes	Yes		DA
AE AE90078 9-78 Short	Ellicott	0	Yes	0	10	0	0	1	13.75 EA	0	Yes	Yes		FF

Back

Close Window

Edit Order Point

Edit Product

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POPUP MENU OPTIONS

Edit Order Point: Opens the Edit Order Point page; from there you can change the order point for the product. Click Save to save any changes made.

Edit Product: Opens the Edit Product – Product Catalog page.

EDIT ORDER POINT

To edit the order point of a product listed on the OP Exceptions Report List page, select the Edit Order **Point** option from the item's popup menu.

The Order Point tab displays all OP that are currently set up for the product. An OP gets created for a Warehouse in one of two ways:

- **Automatically:** The first time a stock record is created at the Warehouse (first time item is added to a transaction – SO/PO/Transfer/etc.).
- **Manually:** User manually creates the OP record prior to a stock being created at the Warehouse.

Depending on the company's preference, the system may run the point order calculation nightly or weekly. The following operations can be performed in this section:

1. Set the minimum quantity of the product to maintain in stock.
2. Set the maximum quantity of the product to maintain in stock.
3. Override the system recommended purchase order quantity.

The Edit Product OP form displays the current OP setup for the item. Make the necessary changes to the form and click **Save**.

Edit Product Order Point			
Warehouse	Harrisburg	Product	SQD QOB235PL
Order Point (User)	<input type="text" value="5"/>	Override Sys. OP	<input checked="" type="radio"/> Yes <input type="radio"/> No Exp Date <input type="text"/>
Min Stock	<input type="text" value="0"/>	Stock Item	<input checked="" type="radio"/> Yes <input type="radio"/> No
Max Stock	<input type="text" value="0"/>	Is Inventory Item	<input checked="" type="radio"/> Yes <input type="radio"/> No
Auto Transfer In Qty	<input type="text" value="0"/>	Keep In Branch	<input type="radio"/> Yes <input checked="" type="radio"/> No
Seasonal	<input checked="" type="radio"/> Default <input type="radio"/> Yes <input type="radio"/> No From - To <input type="text"/> - <input type="text"/>		
Demand Type	3	Rank By	Issues
Demand per Day	0.013333	Rank	DA
Avg. Demand	0.013333	Service Level Factor	0.100000
Safety Stock	0	Std Deviation	4.000000
Forecast Need	0.119997	Cycle Time	2
Order Point (Sys.)	1	Lead Time	7
Annual Sales	8	Max Lead Time	0
Lost Sales	0	Min Lead Time	0
Sys Contract Qty	0	Override Sys Lead Time	<input type="radio"/> Yes <input checked="" type="radio"/> No User Lead Time <input type="text" value="0"/>
		Override Lead Time Exp Date	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/> <input type="button" value="Close Window"/>			

Order Point (User)	<p>To override the system recommended purchase quantity, enter the order point. This is the quantity that you want to maintain in stock. When you generate an RPO this is the number that will be used.</p> <p>Note: If you want to override the system calculations, then the Override Sys. Cal field MUST be set to 'Yes'.</p>
Override Sys. OP /Exp Date	If you want to override the system's calculation, then 'Yes' must be selected. If you wish to set an expire date you can select a date, otherwise leave the date field blank.
Min. Stock	Enter the minimum quantity to maintain in stock. If you entered a User Order Point AND are selecting to override the system calculations, then it is recommended that you keep this field blank (0) as it takes a higher priority over the User OP.
Stock Item	Select whether or not the item is stock or non-stock for the warehouse. This setting will override the product's setting.
Max. Stock	Enter the maximum quantity to maintain in stock.
Is Inventory	Select whether or not this is an inventory item. This setting will override the product's setting.
Auto Transfer in Qty.	To override the system recommended transfer quantity, enter the quantity to order. When you generate a recommended transfer this is the number that will be shown.
Keep in Branch	Select whether or not the item is to be kept within the branch.
Seasonal	Select whether or not the product is to be seasonal. If 'Yes' then enter the date range in which it will be in season.
Override Sys Lead Time / Exp Date	Select whether or not to override the lead time for the item (Purch Param). If Yes, enter the Lead Time to use and date the override is set to expire.

The system performs the following check to find which OP number to use when running OP Calculations:

Selected OP = Sys OP

If Override Sys OP = Y

Then

If User OP > 0

Then Selected OP = User OP

If Min > 0 and Min > Selected OP

Then Selected OP = Min

If Max > 0 and Selected OP > Max

Then Selected OP = Max

EDIT PRODUCT

Opens the Edit Product - Product Catalog page for the Item. From there you can edit/view Product information.

Product Info, Identifications , UOM, Classification, Storage Info , Features Info, Kits, Associations, Packaging, Memos, Vendor Info, Discount Info, Multimedia, Order Point, Purchasing Info and Ix Info.