



Food Service Equipment

Experience the Value of Inventory Planning & Optimization

A smart solution for your finished goods, service parts and supplies inventory

Food Equipment parts and supplies inventory planning has never been easier:

- Reduce inventory by 20%
- Increase customer satisfaction & up time by 10% to 15%
- Improve productivity by 10% to 15%
- Reduce expediting orders
- Eliminate time-consuming manual analysis



“Using the advanced inventory planner from Valogix with we were able to reduce inventory by 10% yielding roughly \$300,000 in cash that had been tied up. We were delighted with the results.”

Rick Crowder
VP/GM, ICI

VALOGIX® Inventory Planner is designed for fast-paced businesses that want to manage their inventory quickly and efficiently. Valogix Inventory Planner’s advanced technology automates the most important steps of the parts planning process and recommends part stocking levels. At any time, these levels can be adjusted for special conditions. Once the stocking level is set, a replenishment requisition is sent directly to the procurement or purchasing system.

VALOGIX Inventory Planner provides User-defined planning groups to insure items like high volume items and critical parts are available. You can even track manuals,



No more manual work to determine:

- Forecasts - up to 36 months
- Replenishment orders
- Stocking levels - by item and location
- Min & Max levels— multiple replenishment methods are available
- Transfers

Dynamic system keeps you current:

- The system automatically adjusts as demand and conditions change.
- Alerts warn you of potential problems before they happen.
- Excess and Inactive inventory are identified to allow further savings.

Smart parts planning:

- Runs multiple forecasting models to select the right one for each part at each location.
- Optimizes and re-balances mix to reduce costs and increase service.
- Replenishes the right amount of stock when it is needed and not before.

How It Works

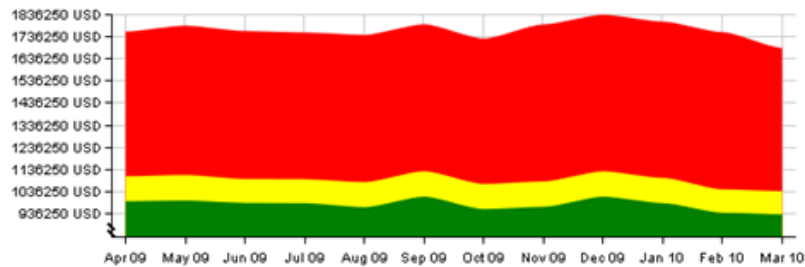
VALOGIX® Parts Planner starts by reviewing the forecast, service requirements, inventory balances, and open orders. Then, using a combination of advanced business rules and service variables it calculates the **Stocking Quantity (SQ)** for each part. A negative *Available Quantity* lets you know your ability to meet projected future demand with current inventory is reduced. The system automatically alerts you of what is needed by part. Reorder information can then be sent to the designated transaction system for processing.

Inventory Aging Summary

Inventory Aging Summary provides you with fast and reliable information on the status of your inventory. The graph shows Active, Excess, and Obsolete inventory positions. The goal is to reduce Excess and Obsolete while improving the Active inventory mix to meet customer orders. Cash flow projections help to understand your investment decisions.

SUMMARY

FORWARD AGING ANALYSIS



Planning Groups

The Planning Group capability will enable planners to define groups of item/locations, and then set default parameter values for all items in the group. More importantly, all item/locations in a Planning Group will be reviewed on the same schedule—and will *only appear when scheduled for review*.

This capability allows the planner to insure planning for critical items receives the high attention customers demand. Planning can be done as often as desired. Planning parameters can be set differently for each group for more concise planning.

PLANNING GROUP PROPERTIES	
Property	Value
Planning Group Name	Critical Items
Description	Must Have in stock
Forecast Flag	True
Optimize Flag	True
Plan Flag	True
Review Frequency	SemiMonthly
Day One of Month	1
Day Two of Month	15
Days Of Week	S M T W T F S S
Minimum Planning Horizon	0.0
Planning Group Leadtime	0
Replenishment Method	Months Of Supply
Desired Service Level	99.0
Months Of Supply	2.0
Trend Length	12
Maximum Number of Zero History Months	3
Minimum History For Trend	8

Cancel Next Finish

VALOGIX® Inventory Planner

Plan parts and supplies smarter and easier. Valogix manages all aspects of your parts inventory in one advanced, simple -to-use software solution. The automated planning tools improve your stock mix by keeping costs low, so you can focus on maintaining high equipment uptime and service.

True Inventory Optimization

One of the key capabilities is the ability to optimize your current and future inventory requirements. The program pin points inconsistencies and exceptions to the business requirements needing attention.

This information allows for corrective action to be taken to meet needs while minimizing inventory investment. Inventory reductions of over 20% or more are achievable. Optimization takes your planning capabilities to a new level of efficiency and cost savings automatically.

Automatic Replenishment Planning

VALOGIX Inventory Planner optimizes and recommends stock levels for all parts at all stocking locations.

The system quickly identifies parts that are or will be in short supply to meet demand on a scheduled basis. It produces a list of parts that have reached a review date and have a need to be replenished. It includes the ability to Buy, Make or Transfer items. In combination with alerts, scheduled replenishments elevate a planner's productivity to new levels.

Automated Forecasting

VALOGIX's proprietary forecasting gives you the forward visibility you need to manage your inventory for up to 36 months. The forecasting engine effectively handles slow, random demand and highly seasonal items, and indicates the model chosen.

It is easy to make a manual change to the forecast. Just change the number in any month on screen and the system will automatically plan for the change while retaining the original value. Forecasting is one variable Valogix solutions use to generate the stocking quantity.

Summary Table:

	Actual Inventory	Ideal Inventory	Adjusted Ideal Inventory	Count
Valogix SQ	50,847.00	33,948,482.36	33,952,709.02	37
Special Order	0.00	0.00	0.00	0
Min/Max	0.00	0.00	0.00	0
Months Of Supply	0.00	0.00	0.00	0
Total	50,847.00	33,948,482.36	33,952,709.02	37

Filters: Item Numbers, Location, Planning Group, Description, Item Class.

Summary Table:

	Planning Group(s)	Filtered List	Pending Replenishment	Released for Order	Deferred	Remaining Negative Net
Line Count with Negative Net	64	68	0	3	1	64
Required or Approved Cost	4,886,032.00	10,751,558.00	0.00	28,898.00	28,429.00	4,886,032.00
Total Line Count	240	68	0	3	1	64

Scheduled Planning Table:

Item Number	Description	Location	Net Quantity	Required Quantity	Approved Quantity	Action	Supplier	SQ	Shortage Ratio	Rele. Date
P10006	Jamie Oliver 6-pc Cool	02	-0.15	0.15	0.15	Transfer	01	0.15	-1.00	2014
P10006	Jamie Oliver 6-pc Cool	02	-0.15	0.15	0.15	Transfer	01	0.15	-1.00	2014

History & Forecast Graph: Line chart showing Volume (0 to 2200) over Months (Jan to Dec) for years 2006, 2007, 2008, and 2010.

History Table:

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals
2006									0.0	0.0	5.0		5.0
2007	1,042.0	1,010.0	1,027.0	29.0	30.0	159.0	275.0	303.0	432.0	650.0	847.0	940.0	6,744.0
2008	1,019.0	932.0	1,036.0	848.0	930.0	730.0	850.0	945.0	841.0	854.0	943.0	1,033.0	10,981.0
2009	1,055.0	1,016.0	1,030.0	1,854.0	909.0	1,068.0	1,073.0	1,054.0	933.0	1,032.0	1,044.0	943.0	13,011.0
2010	1,336.0	1,521.0	1,047.0	1,225.0	1,271.0	1,335.0	1,283.0	1,260.0	1,308.0	1,438.8			13,024.8

Forecast Table (Trend 218.4):

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Totals
2010									1,202.5	1,209.3	2,000.0	1,223.0	5,634.8
2011	1,229.8	1,236.6	1,243.5	1,250.3	1,257.1	1,264.0	1,270.8	1,277.7	1,284.5	1,291.3	1,298.2	1,305.0	15,208.8
2012	1,311.8	1,318.7	1,325.5	1,332.3	1,339.2	1,346.0	1,352.8	1,359.7	1,366.5	1,373.3	1,380.2	1,387.0	16,193.0
2013	1,393.8	1,400.7	1,407.5	1,414.3	1,421.2	1,428.0	1,434.8						9,900.4



Valogix Solutions:

Automate Inventory Planning Process

- Forecasting
- Replenishment planning—new orders, transfers, work orders
- Optimization—reduces costs and improves service and uptime

Are Easy to Use and Affordable

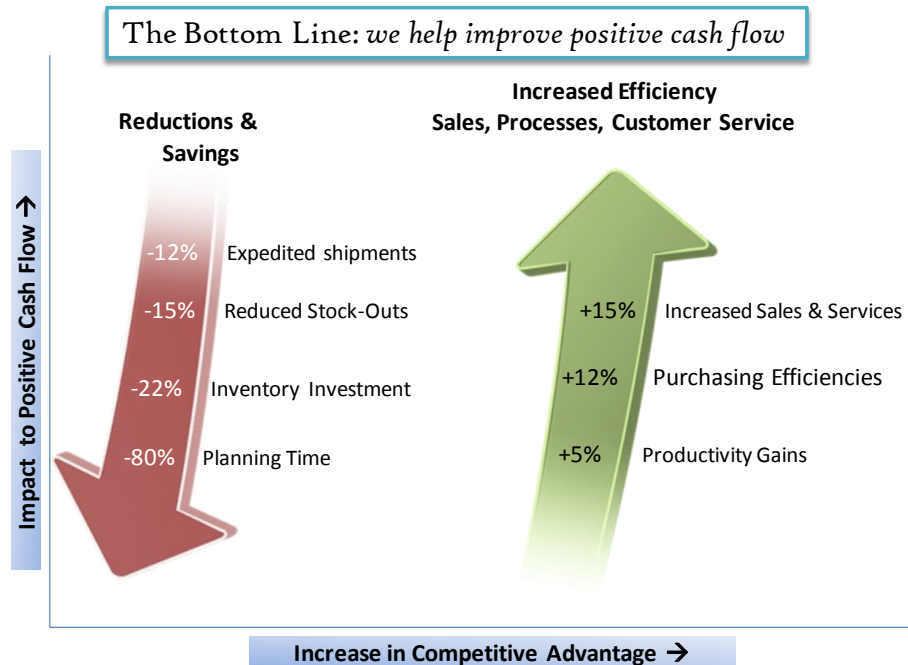
- Simple to use and highly effective
- Exception based—alerts warn of future issues
- The most optimization power for the money

Provide Visibility to All Items and Locations

- No second guessing what parts or where parts are needed
- Planning Groups increase productivity and performance
- Key PMs can be planned for better service

Valogix Delivers Proven Superior Value

The chart below is a representation of the type of potential savings our customers achieve with Valogix solutions. In addition to productivity gains and cost reductions, our customers experience increased revenues from satisfying customers and service requests the first time every time.



Experience Counts

For over 23 years, the Valogix founders have been innovators in inventory planning and optimization solutions. **Contact your local Valogix representative today** and experience the power of value-based inventory planning.

Call: 518-450-0309 • Email : salesinfo@valogix.com • Web Site: www.valogix.com

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