Automatic Restock to Replenished Inventory

This workflow turns maintained warehouse reorder settings into reviewed purchase orders, a partial receipt, and an updated inventory position. It begins with item and vendor setup and ends when purchasing and receiving can explain what Brisk suggested, what staff approved, what arrived, and what remains open.

> **Demonstration notice:** All vendors, items, quantities, identifiers, costs, and transactions are fictional. The documentation run creates controlled draft records and sends nothing to a vendor.

Workflow at a glance

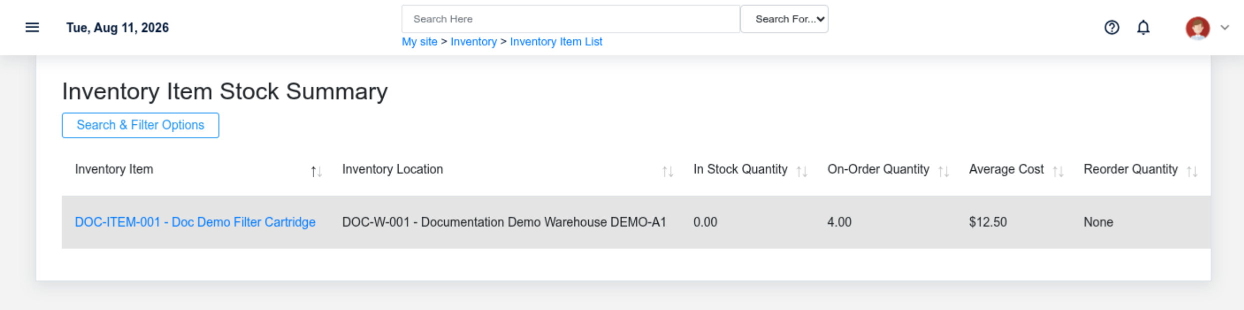
Outcome	Reviewed purchasing work and a traceable partial or complete receipt
Starts with	Maintained warehouse reorder and vendor settings
Ends with	Current stock plus visible received and open quantities
Primary roles	Inventory manager, buyer, receiving clerk
Brisk areas involved	Inventory, Restock, Purchase Orders, Receiving
Common businesses	Feed/supply, parts, equipment, retail
Approximate handoffs	Two

Why this workflow matters

Reorder settings are useful only when they become reviewable work. Brisk considers warehouse stock and incomplete purchase quantities, groups qualifying items by vendor, and creates draft orders rather than silently sending purchases.

Receiving continues from those orders. Staff can distinguish what was ordered, received, and still outstanding before accounting handles the vendor invoice.

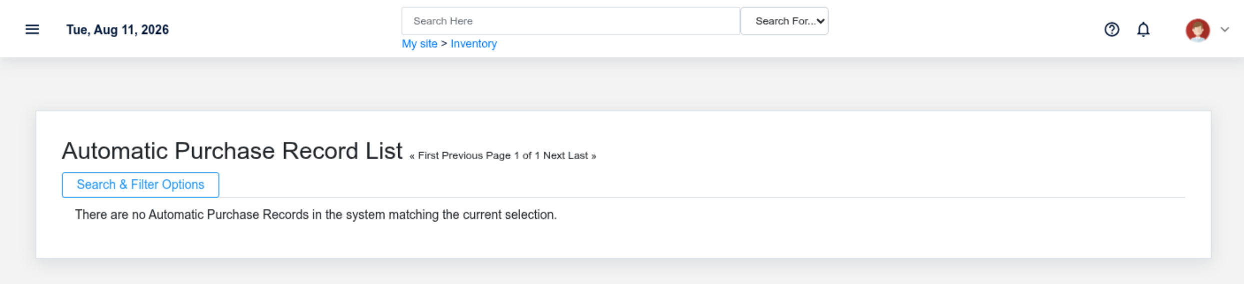
Before you begin



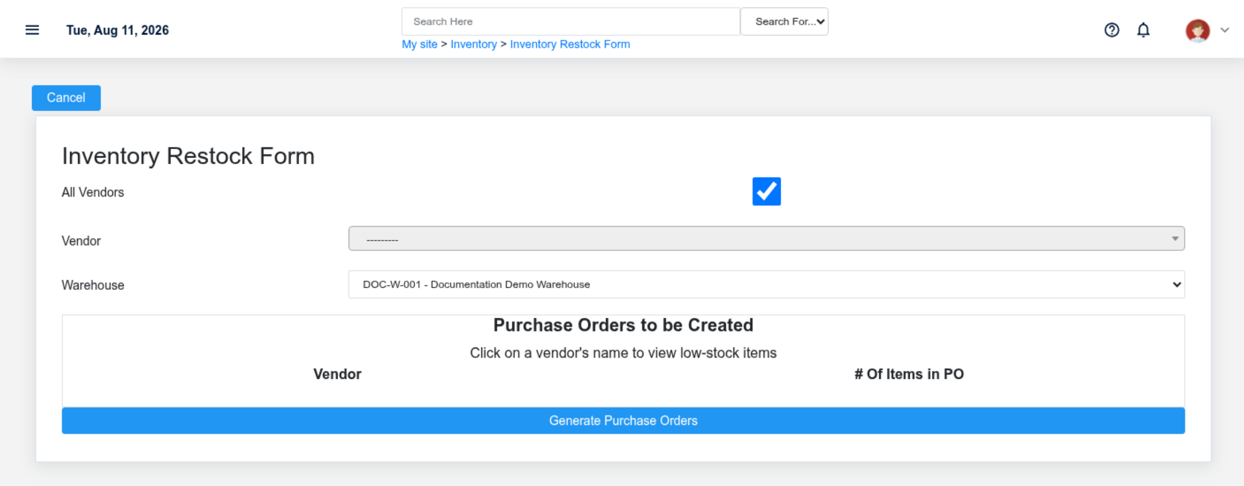
Current purchase quantity, reorder level, maximum, and open purchasing context drive the restock decision.

- Required: stocked Inventory or Manufactured items, warehouse reorder/maximum quantities, primary vendors, units, and costs.
- Required: permission to run Restock, review Purchases, and create Receipts.
- Review incomplete purchase rows and known outside-Brisk orders before another run.
- Vendor minimums, pack sizes, lead times, and seasonal judgment remain human checks.

End-to-end steps



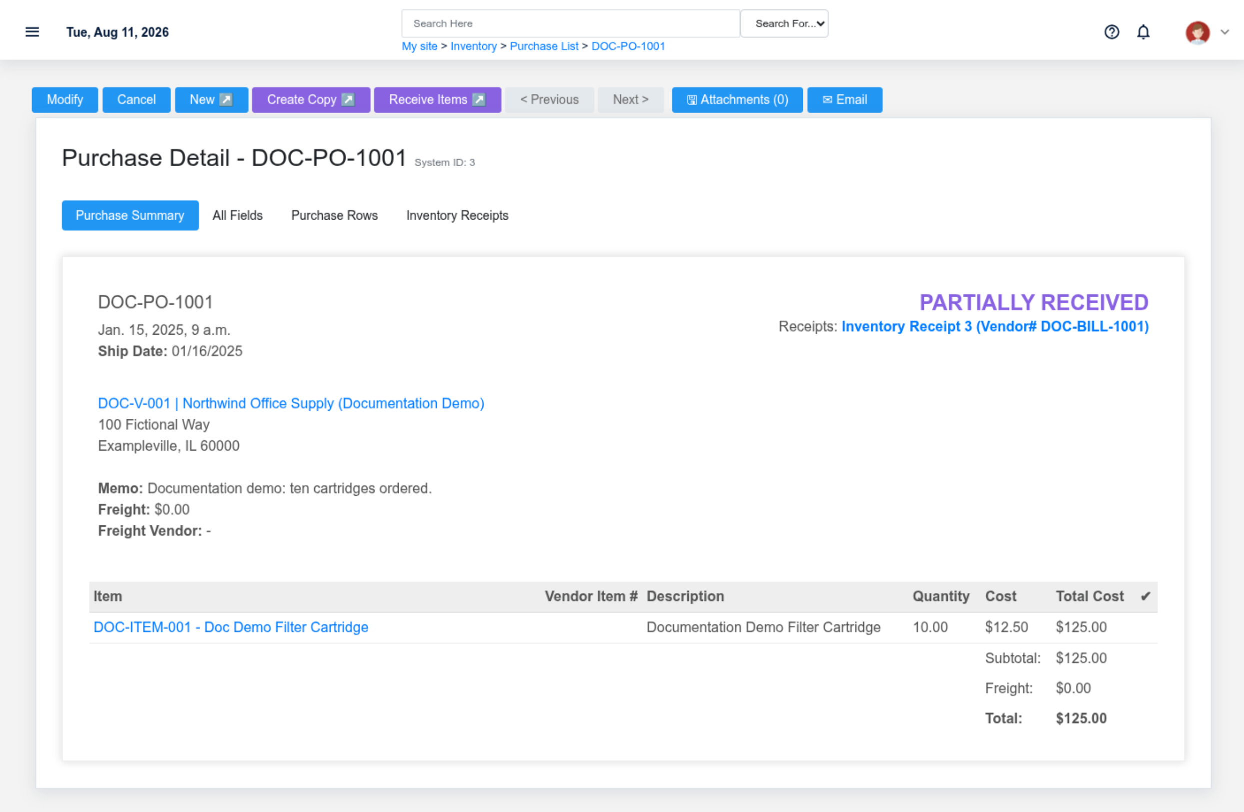
The automatic-purchase record preserves evidence that the draft orders came from a restock run.



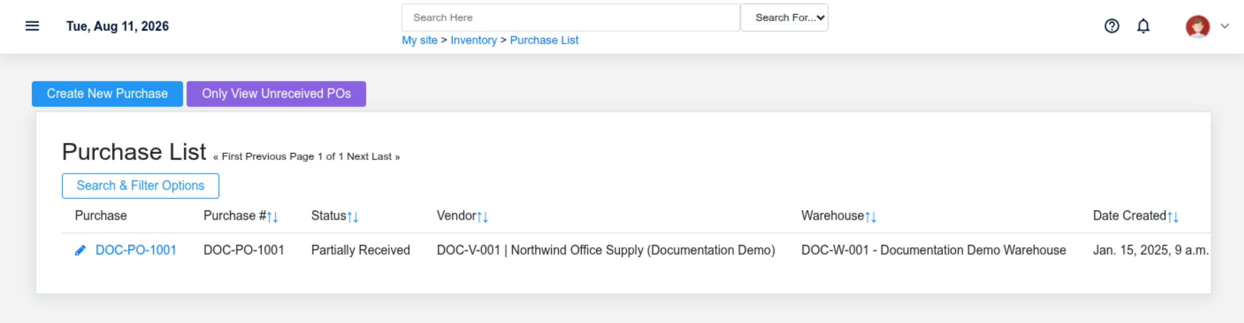
Run restock for one intended warehouse and review the qualifying item/vendor setup first.

1. **Inventory manager — review setup.** Open the Inventory Item and verify vendor assignment, current purchase quantity, reorder quantity, maximum quantity, unit, and cost for warehouse DOC-W-001.
2. **Buyer — run Restock once.** Open Restock Form, choose the intended warehouse and vendor scope, then submit.
3. **Brisk — calculate suggestions.** Inventory and Manufactured items qualify when current purchase quantity plus incomplete purchase-order quantity is at or below the reorder quantity. Suggested quantity fills toward maximum after subtracting stock already in the purchasing pipeline; missing or non-positive maximum setup is skipped.
4. **Buyer — review generated work.** Open the Automatic Purchase Record and each separate draft Purchase Order created per vendor. Correct quantity, cost, unit, date, pack, and vendor minimum before submission.
5. **Authorized buyer — submit the intended order.** Submission does not mean the vendor received an external message unless that separate configured action occurred.
6. **Receiving clerk — record what arrived.** Create an Inventory Receipt from the order. DOC-PO-1001 shows six of ten cartridges received, so its status is Partially Received and four remain open.
7. **Inventory manager — verify.** Review stock summary, receipt quantity, purchase status, and open pipeline. Continue with Purchase to Pay for the vendor invoice and payment.

What Brisk keeps connected



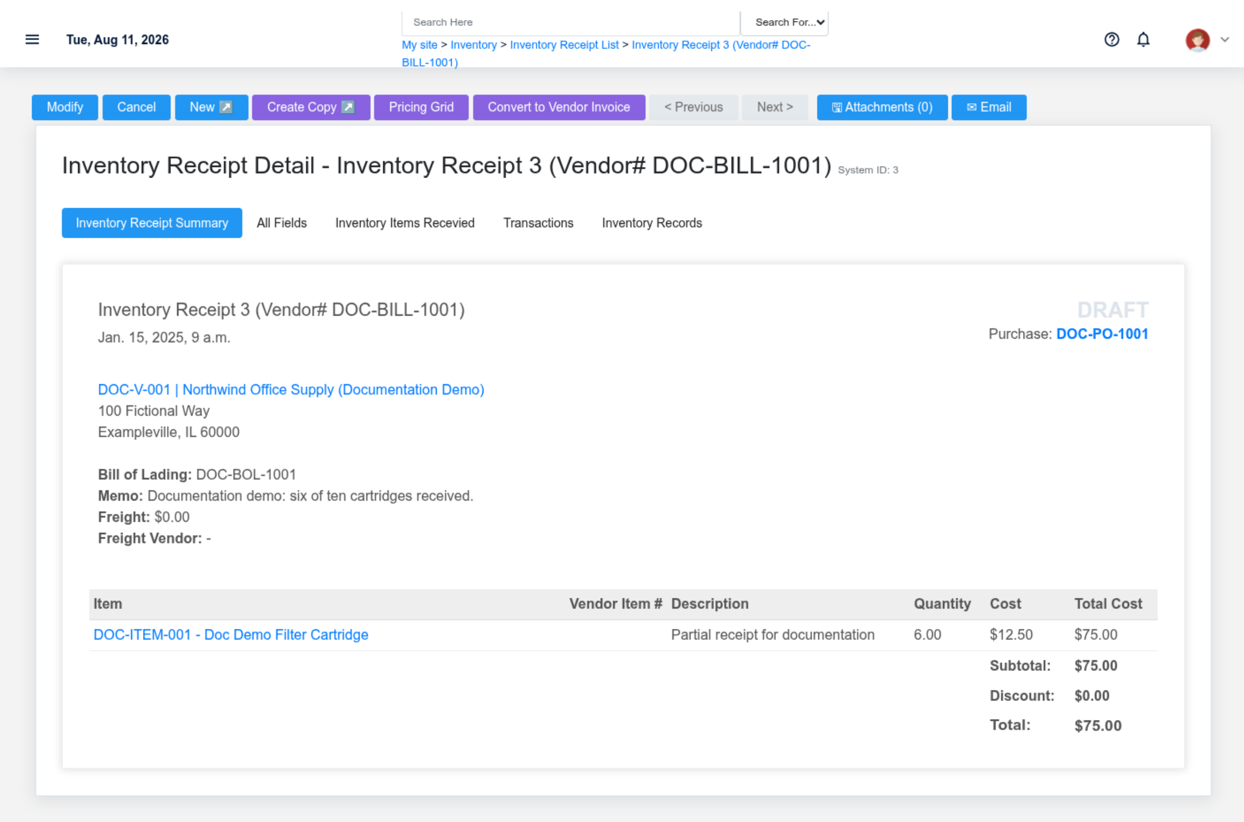
A partial receipt keeps the remaining order quantity visible in the purchasing pipeline.



Brisk separates qualifying items by vendor into draft purchase orders for human review.

Action	Result or downstream record	Where to verify it
Run Restock	Automatic-purchase record and draft orders by vendor	Automatic Purchase Records and Purchases
Review/submit order	Approved vendor, warehouse, rows, quantities and costs	Purchase detail
Receive delivered quantity	Receipt rows linked to purchase rows	Inventory Receipt detail
Process partial receipt	Partially Received purchase with remaining quantity	Purchase detail and stock summary

Handoffs and controls



Receiving records what physically arrived; it does not assume the full purchase order was delivered.

Inventory owns reorder setup, the buyer owns commercial review, and receiving owns physical quantity evidence. Draft, Submitted, Partially Received, and Received matter. The purchase order is the source for ordered quantity; the receipt is the source for what arrived.

Exceptions and safe corrections

- Item missing from Restock: inspect vendor, type, warehouse quantities, maximum, and open rows.
- Suggestion looks too large: check UOM, current stock, incomplete orders, and outside-Brisk purchases before editing.
- Wrong vendor or pack: correct the draft Purchase before submission.
- Partial or damaged delivery: receive only accepted quantity and retain the remaining exception.
- Duplicate run uncertainty: inspect Automatic Purchase Records and draft Purchases before running again.

Related documentation

Start here

- Inventory Items
- Restock Form

Continue with

- Automatic Purchase Records
- Purchase Orders
- Inventory Receipts

Related controls and reports

- Purchase to Pay
- Inventory

Could Brisk Simplify This Process for Your Team?

See how this workflow could be configured around your records, permissions, approvals, and reporting requirements.

[Request a focused Brisk demonstration]

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