

Category	Inventory
Course	Ordering
Version	1.1
Client	Generic
Software	2.18.5.2

# Auto Order Bulk Maintenance Utility

Use this utility to create automatic purchase order schedules, which include supplier specific settings and order frequency. These are applied when you (or the system) generate the suggested automatic orders.

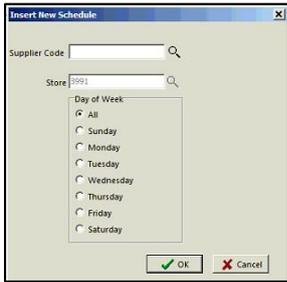
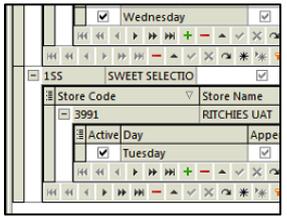
## Hints and Tips

- ✓ Contact Surefire Support if you don't see a shortcut to the utility. It's only useful if a retailer runs automatic ordering, so we don't add it as default.
- ✓ You can save multiple schedules per supplier, to cater for multiple ordering days that may have unique parameters (i.e. custom 'days to order for', 'MOV', and different department tree).
- ✓ To follow this document, you must have an understanding of automatic ordering.
- ✓ The utility is currently only available on the BOS. There will be a HOS->BOS version in a future release.

✓ Menu options:

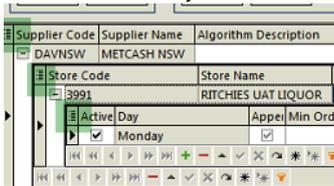
<b>Expand All</b>	See all schedules by DAY.
<b>Collapse All</b>	See outline by SUPPLIER.
<b>Add Schedule</b>	Add a new record
<b>Clone Current Line</b>	Copy a selected record
<b>Move Day</b>	Change the select record to a different day
<b>Save All</b>	Save changes.
<b>See Top Level Defaults</b>	See business-wide defaults for auto-order.
<b>Run Auto Order</b>	Load the Automatic Order screen. Useful to run an order now for one of today's schedules.. See more detail on page 5.

## Procedure to Create a New Schedule

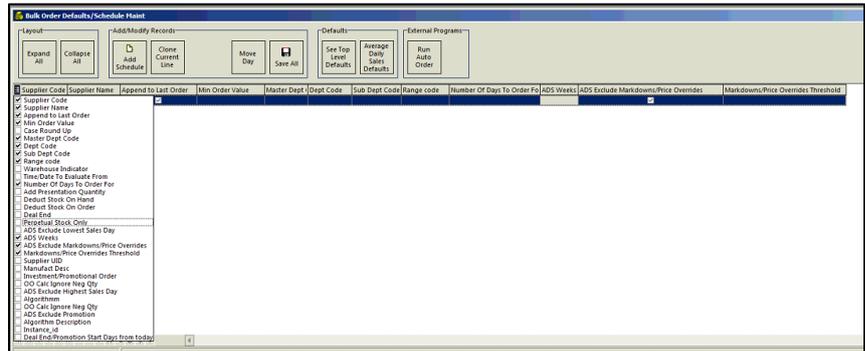
<p>1. From the HOS/BOS Windows desktop:</p> <ol style="list-style-type: none"> <li>double-click the SUREfire folder.</li> <li>Double-click <b>AutoOrderBulkMaint.exe</b>.</li> <li>Enter your BOS Username &amp; Password, and then click <b>OK</b>.</li> </ol> <p><i>* A list of existing schedules displays in the grid.*</i></p>	
<p>2. <b>To:</b> Create a new schedule from scratch</p> <p><b>then:</b> Click <b>Add Schedule</b>. Type or search for the <b>Supplier Code</b>. If a HOS user, type or search for the <b>Store</b>. Select the <b>Day of Week</b>. Click <b>OK</b>. <i>*A warning displays if you create a duplicate schedule (same order frequency and family tree). *The schedule is added.*</i></p>	
<p>Quickly insert a new schedule for the selected Store/Supplier</p> <p>Expand the grid to where you want to add a schedule. Click the green <b>[+]</b> or click <b>[Insert]</b> on the keyboard. Select the <b>Day of week</b>. Click <b>OK</b>. <i>*The schedule is added.*</i></p>	
<p>Copy an existing schedule</p> <p>Click the row to copy. Click <b>Clone Current Line</b>. Optionally change the <b>Supplier</b> to use. HOS user can change <b>Store</b>. Optionally change the <b>Day of Week</b>. Click <b>OK</b>. <i>*The schedule is added.*</i></p>	

**Hints and Tips**

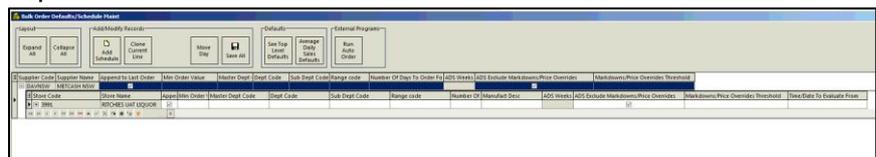
- ✓ Read Only fields are grey.
- ✓ Use the **Hamburger** menu to show/hide the columns in the grid. These are remembered against the user signed in.
  - Columns can be set at the Supplier level, Store level, and at the Day level.
- ✓ You can use order settings from 3 levels:
  - Leave blank to use business level (set in System | Properties | Payables)
  - Set at the Supplier:Store level, to apply across all the 'day' schedules that have been created for that supplier.
  - Set against a specific day schedule.
- ✓ If you set a default at a lower level, this will override any higher level set. I.e. when the order is generated, it will check the Supplier:Store:Day level, then Supplier:Store level, then Top Level Defaults.
- ✓ Minimum Order Value:
  - Is only a dollar value.
  - Can be set per order, OR per day (combined orders/cumulative MOV).
  - If an order that has been generated from the bulk utility does not meet the MOV, a red note displays on the PO screen. This note will disappear if you add more to reach the MOV.
  - Orders that don't reach the MOV can be automatically deleted overnight (see Procedure to Manually Run the Active Schedules).



3. In the grid, add the specific order settings.  
*\*See Hints and Tips.\**  
*\*Use the Hamburger menu to show the columns you want to set.\**  
*\*As a minimum, we recommend you select Days to Order For, any specific department tree, if a custom ADS applies, and if a MOV applies\*.*  
*\*to set a variable ADS by Supplier:Department, rather than at the 'higher' level, refer to Procedure to Set Custom Average Daily Sales on page 3.\**



**Expanded Grid**



4. Click **Save All**.  
*\*The rows are saved, but not cleared.\**

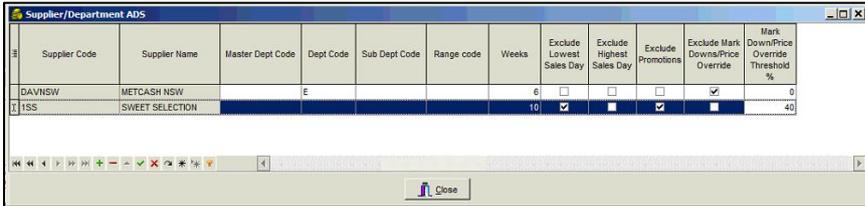
5. <b>To:</b>	<b>then:</b>
Set a variable ADS by Supplier:Dept	Refer to Procedure to Set Custom Average Daily Sales below.
Edit or delete a schedule	Refer to Procedure to Edit or Delete a Schedule below.
Manually run the active schedules	Refer to Procedure to Manually Run the Active Schedules below.



## Procedure to Set Custom Average Daily Sales

### Hints and Tips

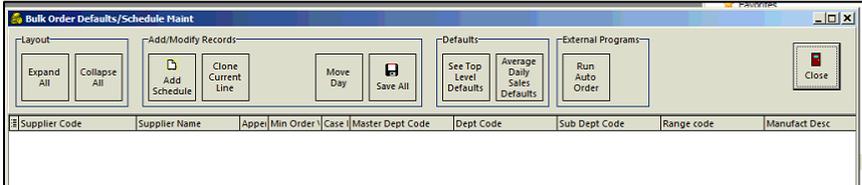
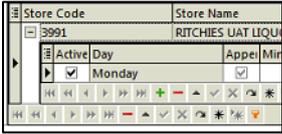
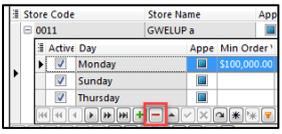
- ✓ You can set custom ADS rule for a specific supplier: department tree combination. You can set multiple defaults for the same supplier, if you have specific rules for each departments tree.
- ✓ Set a custom ADS if a department has different sales history behaviour to the norm. This allows the automatic order algorithm to provide a more accurate suggested order for the supplier (or supplier/department tree).
  - i.e. Freezer orders need to use 6 weeks ADS, compared to Grocery which can use the business default of 13 weeks.
  - If you didn't set a custom ADS, the suggested order would be understated and require manual adjustment on each order (or you'd need to set a higher PQ for impacted product so that it orders enough).
- ✓ Use the **Hamburger** menu to show/hide the columns in the grid. These are remembered against the user signed in.

1.	<p><b>Above the grid, Click Average Daily Sales Defaults.</b></p> 							
2.	<p><b>Set the applicable option:</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; padding: 5px;"> <p>Create a new ADS default</p> </td> <td style="width: 50%; padding: 5px;"> <p><b>then:</b></p> <p>Click the green <b>[+]</b> to add a new default.</p> <p>Enter the supplier this rule applies to.</p> <p>Optionally enter the department tree this rule applies to.</p> <p>Select the 'exclude' rules that apply.</p> <p>If you exclude Markdowns/Overrides, optionally enter a <b>Threshold %</b> to only exclude the sale if it is <u>more</u> than the amount entered.</p> <p><i>*If you leave it blank, then all these sales will be excluded from the ADS calculation.*</i></p> <p><i>*Press <b>Tab</b> to move easily between fields.*</i></p> </td> </tr> <tr> <td style="padding: 5px;"> <p>Edit a saved ADS default</p> </td> <td style="padding: 5px;"> <p>Edit all fields as required.</p> </td> </tr> <tr> <td style="padding: 5px;"> <p>Delete a saved ADS default</p> </td> <td style="padding: 5px;"> <p>Click to highlight the record to delete.</p> <p>Click the red <b>[-]</b>.</p> <p>Click <b>OK</b> to confirm.</p> <p><i>*The custom ADS will not be used when the ADS next runs.*</i></p> </td> </tr> </table>	<p>Create a new ADS default</p>	<p><b>then:</b></p> <p>Click the green <b>[+]</b> to add a new default.</p> <p>Enter the supplier this rule applies to.</p> <p>Optionally enter the department tree this rule applies to.</p> <p>Select the 'exclude' rules that apply.</p> <p>If you exclude Markdowns/Overrides, optionally enter a <b>Threshold %</b> to only exclude the sale if it is <u>more</u> than the amount entered.</p> <p><i>*If you leave it blank, then all these sales will be excluded from the ADS calculation.*</i></p> <p><i>*Press <b>Tab</b> to move easily between fields.*</i></p>	<p>Edit a saved ADS default</p>	<p>Edit all fields as required.</p>	<p>Delete a saved ADS default</p>	<p>Click to highlight the record to delete.</p> <p>Click the red <b>[-]</b>.</p> <p>Click <b>OK</b> to confirm.</p> <p><i>*The custom ADS will not be used when the ADS next runs.*</i></p>	
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3.	<p>Click <b>Close</b> once finished.</p> <p><i>*Changes are automatically saved. They will be applied overnight, so that the ADS calculation includes them when it generates the next order *</i></p>							
								

**Procedure to Edit or Delete a Schedule**

**Hints and Tips**

- ✓ You can edit all the fields for an existing record, you can't move the record to a different supplier.
- ✓ The ability to view and print a list of schedules active for a particular day will be available in the next release.

<p>1.</p>	<p>From the HOS/BOS Windows desktop:</p> <ol style="list-style-type: none"> <li>a. double-click the SUREfire folder.</li> <li>b. Double-click <b>AutoOrderBulkMaint.exe</b>.</li> <li>c. Enter your HOS/BOS User name &amp; Password, and then click <b>OK</b>.</li> </ol> <p><i>*The application opens. A list of existing scheduled is displayed.*</i></p>													
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<p>3.</p>	<p>Click <b>Save All</b>.</p>	<p><input type="checkbox"/></p>												

## Procedure to Manually Run the Active Schedules

### Hints and Tips

- ✓ Your business can automate the Generate.exe, to run at a nominated time every day. This will be listed in **Tools | Scheduled Maintenance**.
  - ✓ The option to see ‘at a glance’ the schedules that are active for a selected day of week, will be the next release.
  - ✓ Only orders that are generated by AutoOrderGenerate will be deleted by the **Clear Orders that have not reach MOV** option. Orders created in the HOS/BOS or through the standalone AutoOrder.exe do not have the MOV logic in them.
  - ✓ Use the **Run Auto Order** option in the Bulk utility, to manually load the saved selections for a supplier scheduled for today. The Automatic Order.exe loads; enter the Supplier, click **Load Defaults**, then click **Run**.
- 
- Only suppliers that have a schedule for today can be loaded.
  - **Load Defaults** will automatically populate the order with the saved selections. Currently, it can only show one schedule; the ability to select from multiple saved schedules will be in a future release.
  - The screen currently doesn’t confirm if an order has been generated; use **Payables | PO Summary** screen to check.
  - Load Defaults button is only enabled if the System Param APO\_UseOrderScheduling is set to True.

1.	<p>From the HOS/BOS Windows desktop:</p> <ol style="list-style-type: none"> <li>a. double-click the SUREfire folder.</li> <li>b. Double-click <b>AutoOrderGenerate.exe</b>.</li> </ol> <p><i>*The application opens.*</i></p> <p><i>* Contact Surefire Support if you don’t see a shortcut. It’s only used if a retailer runs automatic ordering, so we don’t add it as default.*</i></p>							
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