Need help? Tel: 1300 724 667   Email: support@surefire.com.au

SURE*fire*
SYSTEMS

TECH-3d *Page| 1 of 2*

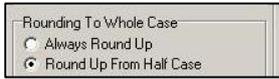| Category	Technical
Course	BOS Config.
Version	1.0
Client	Generic
Software	2.15.8

Configure Automatic Order Settings

You can save defaults for the automatic purchase order screen; this saves you repeating common selections each time you create an automatic order.

Procedure to Configure Automatic Order Settings

Hints and Tips

✓ **Projected Sales:** Order based on the sum of the average daily sales over the selected number of weeks (e.g. 13), for the days of the week corresponding to your request.

✓ **Investment/Promotional order:** Limit the scope of products reviewed to those on deal (for investment buy) or promotion (to increase stock in readiness for promotion).

✓ **Adjustments**: If running perpetual inventory, the system order calculation can adjust the recommended quantity to:
  • deduct SOH and/or SOO
  • add a presentation quantity assigned to the product.

✓ **Rounding** rule for converting units to the nearest full case:
  • **Always round up** orders extra units to equal a case.
  • **Round Up From Half Case** orders extra units to top up more than half a case to a whole case, but won't order the part-case if it's half a case or less than half a case.

✓ **Average Daily Sales section:**
  • **Number of weeks** is how many weeks history you want to use for the ADS calculation.
  • **Exclude Promotion** and **Exclude Lowest Sales Day** are used to exclude abnormal sales from the ADS calculation.
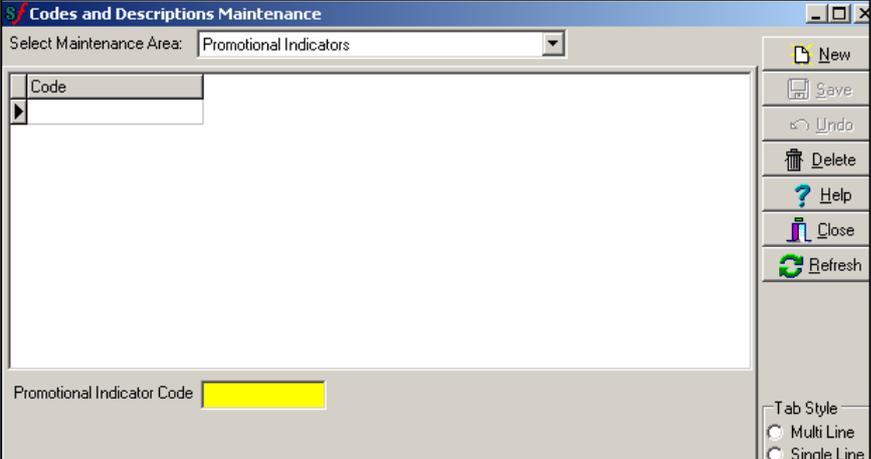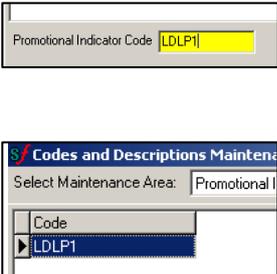
1.	Contact SURE*fire* Retail Support to check or edit the following system parameters for automatic ordering: • If products that aren't 'stocked' are ignored. • If logically deleted products are ignored. • If product with a PQ set to [0] ignored when using the Projected Sales method.	
2.	From the BOS **System** menu, select **Properties**.	
3.	Click the **Payables** tab.	
4.	In the **Algorithm** field, select the default automatic ordering method. *Default is usually **Projected Sales**.*	
5.	If you will use the Projected Sales method (even if not as the default), under the Projected Sales section, make the following selections: a. In the **Number of Days to Order For** field, type the default number of days of stock to order for (based on delivery frequency); e.g. [**3**]. b. Select **Promotion Start.** c. Select the **Adjustments** check boxes as required.	
6.	Select the default rounding rule. *Usually Round Up From Half Case.*	
7.	Under the Average Daily Sales section, make the following default selections: a. **In the Number of Weeks** field, type the number of week's history to review. *Usually [8] or [13].* b. Select the **Exclude Promotion** check box. c. Select the **Exclude Lowest Sale Day** check box.	
8.	Click ⊞ Save	
9.	Click 🔲 Close	
		❑

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Procedure to Configure a Long Promotion Exclusion

Hints and Tips

✓ If your business runs long term promotions, the projected sales automatic ordering calculation can check if the item was on one last week, and if so only use weeks with promotional sales, instead of using normal sales.

- You'll have to manually adjust the order quantity (or do a separate promotional order) the first week it goes on and comes off promotion, otherwise two little or too much stock respectively will be ordered.

1.	From the BOS **Tools** menu, select **Codes and Descriptions**.	
2.	Click the Maintenance Area **Promotional Indicators**.	

3.	**To:**	**then:**	
	add a new long promotion exclusion	Click **New**. Type the associated **Promotional Indicator Code**. Click **Save**.	
	delete a long promotion exclusion	Select the applicable Code in the list. Click **Delete**. Click **Yes** to confirm.	
4.	Click Close .	
		❏