

Category	Inventory
Course	Ordering
Version	1.0
Client	Generic
Software	2.15.9

BOS Automatic Orders

You can create an automatic normal order, investment order, or promotional order for a supplier.

Procedure to Create an Automatic Purchase Order

Hints and Tips

- ✓ Contact SUREfire Retail Support to schedule the **AWS calculation**.
- ✓ To set defaults, refer to the [TECH-3d Configure Automatic Order Settings Fact Sheet](#).
- ✓ If a product has a **min. order qty** set on the Stock screen, the suggested order will at least equal this quantity.
- ✓ **Desired Stock Levels** orders the [DSL – SOH – SOO]. Refer to the [INV-2h Set Presentation Levels and Desired Stock Fact Sheet](#).
- ✓ **Projected Sales** orders [x] number of day's worth of stock, based on the sum of the ADS for the days selected. It may be configured to always exclude promotional sales.
 - If your business runs long term promotions, the 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. Refer to the [TECH-3d Configure Automatic Order Settings Fact Sheet](#).
- ✓ **Presentation Quantity [PQ]** is 'show stock'. Refer to the [INV-2h Set Presentation Levels and Desired Stock Fact Sheet](#).
- ✓ **Sales Replenishment** only orders what you've sold. It's useful for expensive products, or to automate ordering for non-perpetual inventory.

1.	From the BOS Payables menu, select Purchase Order .							
2.	Click the Automatic tab.							
3.	In the Supplier Code field, type or search for the supplier's code to order against.							
4.	<p>To order based on:</p> <table border="1"> <tr> <td>desired stock levels</td> <td>Desired Stock Level. Go to step 6.</td> </tr> <tr> <td>average daily sales (ADS)</td> <td>Projected Sales. Go to step 5.</td> </tr> <tr> <td>what you've sold from a selected date to the current date/time</td> <td>Sales Replenishment. Select the date to evaluate sales from (<i>defaults to their last order</i>). Go to step 6.</td> </tr> </table>	desired stock levels	Desired Stock Level. Go to step 6.	average daily sales (ADS)	Projected Sales. Go to step 5.	what you've sold from a selected date to the current date/time	Sales Replenishment. Select the date to evaluate sales from (<i>defaults to their last order</i>). Go to step 6.	
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5.	<p>Complete the following steps to order based on projected sales:</p> <ul style="list-style-type: none"> • In the Projected Sales section, enter the days to order for (today is the first day). • Select if you only want to review items set to Perpetual Stock (Only). • If you want an Investment/Promotional Order, select the required Deal End or Promotion Start Date. • In the Adjustments section select the rules to apply in the calculation (<i>deduct SOH & deduct SOO is only relevant if you're running perpetual inventory</i>). <p><i>*If you don't order/receive every day, Days to Order is from today to the day of next delivery.*</i> <i>*Don't Deduct SOO if you don't invoice match for the supplier, as the SOO value will be wrong.*</i></p>							
6.	<p>Select the rounding rule for part-cases:</p> <ul style="list-style-type: none"> • Always round up orders extra units to equal a case. • Round Up From Half Case orders extra units to top up more than half case to a whole case, but won't order the part-case if it's a half case or less; this may mean the product isn't ordered (unless PQ is more ½ case). 							

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Hints and Tips

- ✓ **Investment/Promotional orders:**
 - Create these orders after the original automatic order.
 - The suggested order only considers normal ADS, so you don't have to be running perpetual inventory.
 - Unselect all **Adjustments** options.
 - **Investment orders** give the promotional buy benefit without the promotional sell obligation. It lists all products on an active deal.
 - **Promotional orders** retrieves all products starting and on promotion; the order quantity suggested is based on the normal ADS, so you'll probably have to increase the quantities to match sales expectations. Alternatively, create a manual order.

- ✓ Refer to the [INV-2k Troubleshoot an Automatic Order Fact Sheet](#) if your automatic order hasn't generated as expected
 - Either it's missing expected items or unexpected items have been ordered.

7.	Select the area of the store you want to order for (store-wide down to a specific product group).							
8.	Select if the order calculation only includes products that have this supplier as the default. <i>*The default supplier usually gives your business the best deal.*</i>							
9.	If required, type a Warehouse indicator to only order products from this supplier/source.							
10.	Click Run .							
11.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 5px;">If SUREfire suggests:</td> <td style="padding: 5px;">then:</td> </tr> <tr> <td style="padding: 5px;">no order</td> <td style="padding: 5px;">click OK; change your criteria or click Close. End of Process.</td> </tr> <tr> <td style="padding: 5px;">an order</td> <td style="padding: 5px;">click OK to display the order. Go to step 12.</td> </tr> </table>	If SUREfire suggests:	then:	no order	click OK ; change your criteria or click Close . End of Process.	an order	click OK to display the order. Go to step 12.	
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12.	Refer to the INV-2f Review and Send a Supplier Order Fact Sheet .							
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