

**INV-2i** Page | 1 of 1

Category	Inventory
Course	Ordering
Version	1.1
Client	Generic
Software	2.14.105.1

**Hints and Tips**

- ✓ **Presentation Quantity (PQ)** is the number of shelf facing's to 'look presentable' – e.g. two deep per facing.
  - You don't have to set a multiple of the case quantity.
  - Set slow sellers to the daily sales, to help force an order.
  - Edit PQ as layout changes, or during a season transition until average daily sales catches up (or edit the order instead).
  - Your auto-ordering may be set to ignore products with [0] PQ.
  - Your system can be configured to set an item to stocked and perpetual when you set the PQ to a value greater than [0].
  
- ✓ **Desired Stock Levels** is the quantity of stock that you want to replenish back to. Once the SOH falls half a case or more below the DSL, SUREfire suggests an automatic order of [DSL – SOH – SOO + o/override].
  - Include any presentation quantity in the value entered.
  - Use the **Weekly Sales & Daily Sales** tabs for sales history.
  
- ✓ **PQ and DSL** don't impact the others logic during ordering.
  
- ✓ **Fields:**
  - **Case Quantity:** units per ordering case.
  - **SOO:** Stock on Order (units).
  - **SOH:** Stock on Hand units; you can change the value (do a stock adjustment).
  - **Oversupply/Owing units:** SOH minus DSL; a negative value means SOH is under the DSL. i.e. if DSL=[72] and oversupply/owing is [-63], then SOH will be 9 (9 minus 72). So the next order will be 63 units.
  - **Order Override:** A one-off extra number of cases added to the next DSL auto order.

# Presentation Levels and Desired Stock

If you create an automatic order on the BOS based on:

- projected sales, you can adjust the suggested order to include **presentation quantities** if they've been set for the product/s
- **Desired Stock Levels (DSL)**, you must set a **desired stock** for every product you'll order using this method.

## Procedure to Set Presentation Levels and Desired Stock on the BOS

<p>1. From the BOS <b>Payables</b> menu, select:</p> <p><b>a. Automatic Ordering Settings</b> <b>b. Stock Level Adjustment.</b></p>							
<p>2. In the <b>Stock/Stock EAN Code</b> field, type or search for the product EAN or stock code.</p>							
<p>3. Press <b>Enter</b> if you typed the code.</p>							
<table border="1" style="width: 100%;"> <tr> <td style="width: 50%;"><b>To set a:</b></td> <td style="width: 50%;"><b>Then:</b></td> </tr> <tr> <td>presentation quantity</td> <td>in the <b>Presentation Quantity</b> field, enter the required quantity in units.</td> </tr> <tr> <td>desired stock quantity</td> <td>in the <b>Desired Store Level</b> field, enter the required quantity in units. <i>*Or click <b>Clear Oversupply/Owing</b> to reset the Desired Stock Level to the current <b>Stock on Hand</b> value.*</i></td> </tr> </table> <p><i>*You always enter the quantity in units.*</i></p>	<b>To set a:</b>	<b>Then:</b>	presentation quantity	in the <b>Presentation Quantity</b> field, enter the required quantity in units.	desired stock quantity	in the <b>Desired Store Level</b> field, enter the required quantity in units. <i>*Or click <b>Clear Oversupply/Owing</b> to reset the Desired Stock Level to the current <b>Stock on Hand</b> value.*</i>	 
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finish	press						
<p>7. To set or edit a one off <b>order override</b> for the product, refer to the <a href="#">INV-2j Set a One-off Automatic Order Override (BOS) Fact Sheet</a>. <i>*Only applicable if using the DSL replenishment method.*</i></p>							
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