

Category	Inventory
Course	Ordering
Version	2.1
Client	Generic
Software	2.18.3.2

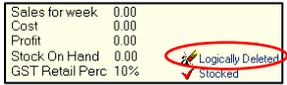
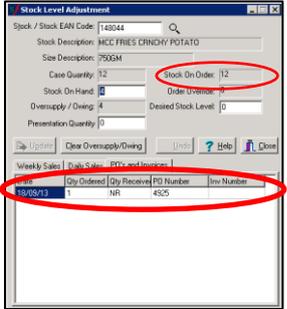
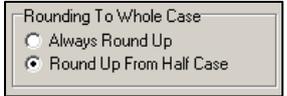
Troubleshooting an Automatic Order

This document is to troubleshoot an automatic order that has not generated as expected using the **projected sales** method.

If Expected Items aren't Appearing on the Automatic Order

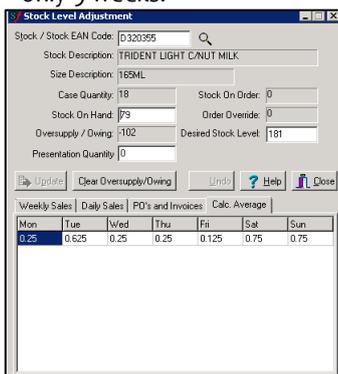
Hints and Tips

- ✓ To follow this document, you must already have an understanding of inventory management within SUREfire.
- ✓ If you're unsure how your system is configured for automatic ordering, ignore steps 1-4 and please contact SUREfire Support.
- ✓ Refer [INV-2d Create an Automatic Order \(BOS\)](#) for creating an auto order.
- ✓ Remember that the **Projected Sales** logic orders [x] units of stock, based on the sum of the daily sales for the days selected to order for, divided by the number of weeks included (this is usually 8 or 13, set in **Properties -> Payables**, or 1st invoice date in the case of new lines with less history).
 - It may be configured to exclude days with promotional sales and/or the lowest sales day ([o] counts as lowest sales), which also means the sum is divided by less weeks. You can also select to add PQ and deduct SOH and SOO before you generate the order. That is: $(ADS + PQ) - (SOH + SOO)$.
 - If you don't order/receive every day, **Days to Order** is usually from today to the day of the 2nd delivery inclusive.
 - Don't **Deduct SOO** if you don't perform invoice matching for the supplier, as the SOO value will be wrong.

1.	Your system may be set to ignore items that are not set as 'Stocked' .	
2.	Your system may be set to ignore items that are not set as 'Perpetual Stock' . <i>* Inventory best practice is to select the Perpetual Stock flag for all items that you're managing inventory for.*</i>	
3.	Your system may be set to ignore logically deleted items.	
4.	Your system may be set to ignore items that have a presentation quantity (PQ) of zero. <i>*You can check what PQ has been set via the webRF (Auto Ordering -> PQ), or on the BOS (Payables -> Automatic Ordering Settings -> Stock Level Adjustment).*</i>	
5.	The Deduct Stock on Order (SOO) option was selected for the auto order, and there's either; <ul style="list-style-type: none"> • legitimate SOO, or • old orders that haven't been matched to invoices, resulting in them appearing as outstanding. <i>*Use the Stock Level Adjustment function to view outstanding (unmatched) purchase order numbers for items.*</i>	
6.	The Round up from half case option was selected for the auto order, and the suggested order quantity was a half case or less so it was ignored from this order. <i>*When using this option, the number of units must be <u>more</u> than half a case before it will appear on the order.*</i>	
7.	System stock on hand (SOH) is higher than the physical stock on hand. <i>*Delete the PO, adjust the SOH to match stock holdings, then generate the auto order again.*</i>	

Hints and Tips

- ✓ To view the average daily sales for a product across each day of the week, go to **Payables -> Automatic Ordering Settings -> Stock Level Adjustment**.
 - This is available from 21.5.
 - Sum the days the automatic is ordering for, and this will be the number of units you should expect on your automatic order – just remember to factor in the PQ, SOH, SOO, and rounding up rules applied.
 - If a day has [0] normal sales, the week is still included to calculate the average.
 - If your system is configured to ignore promotional sales and/or lowest day sales, the average is calculated EXCLUDING these sales and divides only by the number of weeks of applicable data. i.e. if the product is on promotion 4 weeks over 13 weeks, the promotional sales are ignored and the average is calculated using only 9 weeks.



- ✓ If you are not able to resolve the issue after following these instructions, please contact SUREfire Support for further assistance.

<p>8. The Average Daily Sales (ADS) calculation is configured to exclude items on promotion, and the item has been on promotion for the whole ADS period.</p> <p><i>*If the produce is on a long-term promotion, you can configure the automatic order to suggest a quantity based off promotional sales history (even if you have configured your system to ignore promotional sales). Refer to TECH-3d Configure Automatic Order Settings*</i></p>	<table border="1"> <thead> <tr> <th>Quantity</th> <th>Promotion</th> </tr> </thead> <tbody> <tr><td>2</td><td>V_CM</td></tr> <tr><td>7</td><td>V_CM</td></tr> <tr><td>2</td><td>COKE</td></tr> <tr><td>5</td><td>COKE</td></tr> <tr><td>1</td><td>V_AD</td></tr> <tr><td>11</td><td>V_AD</td></tr> <tr><td>54</td><td>COKE</td></tr> <tr><td>7</td><td>COKE</td></tr> </tbody> </table>	Quantity	Promotion	2	V_CM	7	V_CM	2	COKE	5	COKE	1	V_AD	11	V_AD	54	COKE	7	COKE				
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<p>9. The item has a different default supplier to the one that the automatic order was generated for.</p> <p><i>*If the item should always be ordered from this supplier, then you should make it the default supplier on the Stock screen.*</i></p>																							
<p>10. The item is a very slow selling line (sales are infrequent and very spread out), so it hasn't sold in the period that average daily sales is configured to review.</p> <p><i>*Use the Scheduler Utility to target this supplier:Dept/Sub Dept/Range with a custom (higher) ADS weeks to review. This updates overnight to fix the next order.*</i></p> <p><i>*Set the PQ to the daily sales i.e. sells 3 set PQ to 3.*</i></p>	<table border="1"> <thead> <tr> <th>Week Starting</th> <th>Sales</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> </tbody> </table>	Week Starting	Sales																				
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<p>11. The item has under-ordered; you're selling more now, because you've reduced the normal price of the item.</p> <p>Until the new sales history catches up, you'll need to add a top-up for these items, by either temporarily increasing the PQ and ticking to include it on the order, OR manually upping the suggested quantity when you review the order.</p> <p><i>*i.e. running a 13week review for automatic ordering means that it will take this long (plus a few more weeks, for the time it took customers to realise new buying pattern) for your automatic ordering calculation to fully reflect the greater sales and thus suggest enough stock to reorder.*</i></p>																							
<p>12. You've generated an auto order for a department (e.g. Dairy), but the item is actually registered to a different department (e.g. Deli).</p> <p><i>*The department this item resides in must either be changed on the Stock screen, or you'll always need to manually add this item after the automatic order has been generated.*</i></p>																							

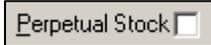
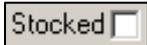
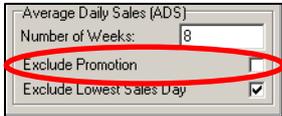


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If Unexpected Items are Appearing on the Automatic Order

Hints and Tips

- ✓ If you're unsure how your system is configured for automatic ordering, ignore step 3 and please contact SUREfire Support.
- ✓ Best practice for managing stock is to unselect the **Stocked** check box against an item if it'll no longer stocked in store.
 - This needs to occur after the last unit in store has been sold.

1.	<p>System stock on hand is less than the physical stock on hand. <i>*Perform a stock adjustment so that the system SOH matches physical SOH; you should also investigate why this occurred.*</i></p>									
2.	<p>The default supplier set for this item isn't the supplier you usually be ordered from. <i>*Set the default supplier on the Stock screen to the supplier this item is usually ordered from.*</i></p>									
3.	<p>Select the applicable option:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">If the item is being phased out, and</th> <th style="text-align: left;">then:</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px;">your system is configured to ignore items with a zero presentation quantity</td> <td style="padding: 5px;">set the PQ to [0].</td> </tr> <tr> <td style="padding: 5px;">your system is configured to ignore item that are not set as 'perpetual stock'</td> <td style="padding: 5px;">unselect the Perpetual Stock check box against this item on the Stock screen.</td> </tr> <tr> <td style="padding: 5px;">your system is configured to ignore items that are not set to 'stocked'</td> <td style="padding: 5px;">unselect the Stocked check box against this item on the Stock screen, once there is no more stock left.</td> </tr> </tbody> </table>	If the item is being phased out, and	then:	your system is configured to ignore items with a zero presentation quantity	set the PQ to [0].	your system is configured to ignore item that are not set as 'perpetual stock'	unselect the Perpetual Stock check box against this item on the Stock screen.	your system is configured to ignore items that are not set to 'stocked'	unselect the Stocked check box against this item on the Stock screen, once there is no more stock left.	  
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4.	<p>Promotion sales may not have been excluded from the ADS calculation. <i>*This would result in the system wanting to order more items than what is required for non-promotional periods.*</i></p>									
5.	<p>The item is located in the incorrect department. <i>*The department this item resides in must be changed on the Stock screen, otherwise this item will always be on orders generated for this department when stock is required.*</i></p>									
13.	<p>The case quantity is incorrect, so too many cases are ordered. <i>*i.e a product has CQ set to 1 and 5 units are recommended, resulting in 5 cases ordered; but in fact the actual CQ is 6 so only needed to order 1 case. Correct the CQ, then delete and regenerate the order.*</i></p>									
14.	<p>There is lots of markdowns/price overrides sold, so too many cases are ordered. <i>*Use the Scheduler Utility to set a rule to exclude any markdown sales where the discount was more than more than [x] %. This is applied overnight to fix the next order.*</i></p>									

