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Category	Technical
Course	BOS Config.
Version	1.2
Client	Generic
Software	2.18.6.45

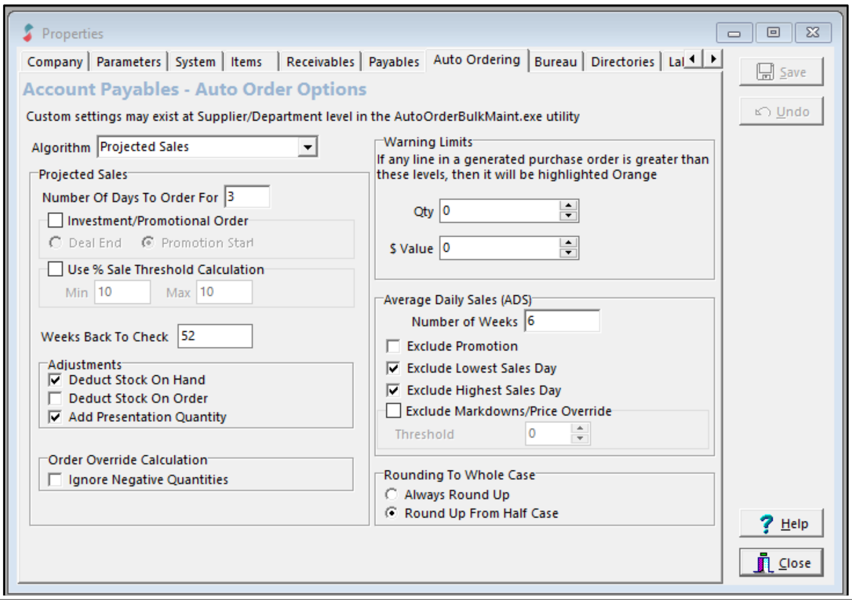
Hints and Tips

- ✓ **Projected Sales:** Orders x units of stock, 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.
- ✓ Projected sales is the most common logic used by Supermarkets. You can use the Bulk Auto Order Utility (Schedular) to customise some variables at Supplier/Dept level (such as more or less weeks sales history). This is useful for slower selling categories.
- ✓ **Defaults for Replenishment method:**
  - Sales Replenishment only orders what you've sold. It's useful for expensive products, or to automate ordering for nonperpetual inventory.
  - The only defaults that apply are for **Ignore Negative Quantities and Rounding** rule.
  - Support can also set **System params** to ignore non stocked and/or logically deleted items.
- ✓ **Defaults for Desired Stock method:**
  Desired Stock Levels orders the [DSL – SOH – SOO].
  - Refer to the INV-2h Set Presentation Levels and Desired Stock Fact Sheet.
  - Only the Rounding rule default applies.
  - Support can also set **System params** to ignore non stocked and/or logically deleted items.

Configure Automatic Order Settings

You can save defaults for the automatic purchase order screen; this saves you repeating common selections each time you (or the Bulk Auto Order Scheduler Utility) create an automatic order.

Procedure to Set Defaults for Projected Sales Auto Orders

1.	Contact Surefire 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.	
2.	From the BOS **System** menu, select **Properties**.	
3.	Click the **Auto Ordering** tab. 	
4.	In **Algorithm**, select **Projected Sales** method. **The user can override this during order creation.**	
5.	In **Number of Days to Order For**, type the default number of days of stock to order for **If you don't order/receive a load every day, this is usually from today to the day of the 2nd delivery inclusive; e.g. [5] if you order on a Monday (delivered Wed) and order on a Wed (delivered Friday).** **The user can override this during order creation.**	

Hints and Tips

✓ **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).

✓ To create **promotional automatic orders,** the system finds only the most recent promotional sales which occurred on the days being ordered for. It looks for either the exact same promo sell or within the price range you entered. It looks back up to the maximum of the number of weeks you have entered, but once it finds a matching price it stops and uses that history.

✓ **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:
- **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 Sales:**
- For new lines which don't have the full '**number of weeks'** sales history, AWS divides by the number of weeks available instead (from its 1st invoice date; if <1 week, it rounds up to 1 week).
- If you exclude any exceptional sales, the sum is divided by less weeks of sales history.

6.	If you will create promotional automatic orders, make the following selections: a. In **Weeks Back to Check,** enter the number of weeks back the system should check for promotion sales. b. In **Use % Sale Threshold Calculation** optionally look for sales history where the item was sold *within* a **Min** and **Max** % range of the upcoming promotional sell. i.e. Min 1% and max 10%; if coke will be on promo for $2, it will find the first past promo price between $1.98 and $2.20. **The user can override this during order creation.** **You usually don't select **Investment/Promotional Order**, as this means that every automatic order you create will default to be this type of order*.*	
7.	Optionally select the **Adjustments** as required.	
8.	Optionally select **Ignore Negative Quantities,** if you will be using the Order Overrides. **Order Overrides are set in Payables | Automatic Ordering Settings | Order Override.** **This will force the order override amount to be ordered, even if the suggested order quantity is negative (i.e. due to SOH/SOO being more than the sum of the average sales).**	
9.	Optionally add **Warning Limits** for automatic orders which exceed a specified **Qty** and/or **$ Value**. **Items will be highlighted orange on the suggested order to indicate review is needed.** **This is useful to catch items with wrong case qty or presentation qty. **	
10.	Within the Average Daily Sales section, complete the following steps: a. Enter the **Number of Weeks** sales history to use for the ADS calculation. **Usually [8] or [13].** b. Optionally select **Exclusions** to exclude exceptional sales from ADS calculation. **Markdowns/overrides can be all or only those reduced by more than the **Threshold** %.** **Automatic promotional orders only look at promotional sales, they do not consider any of these Exclusions.**	
11.	Select the default rounding rule. **Usually Round Up From Half Case.**	
12.	Click **Save** and **Close.**	
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