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Category	Inventory
Course	Ordering
Version	2.0
Client	Generic
Software	2.14.100

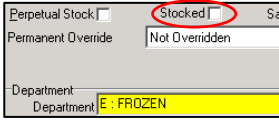
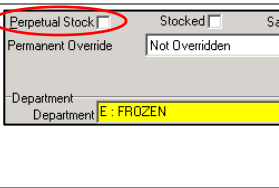
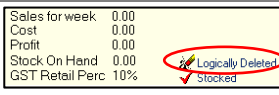
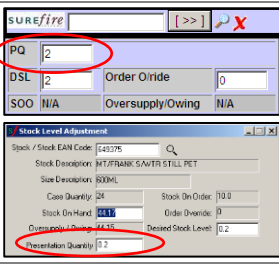
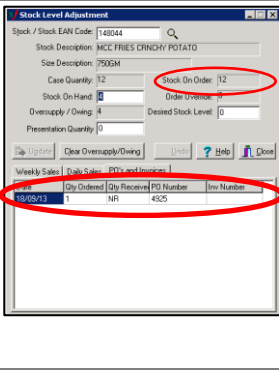
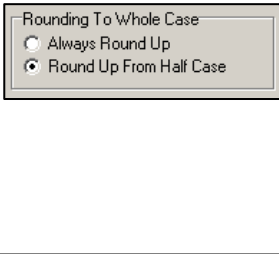

Troubleshooting an Automatic Order

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.
- ✓ Ensure you're using the **Projected Sales** method to create the Automatic Order.
- ✓ Refer [INV-2d Create an Automatic Order \(BOS\)](#) for creating an auto order.
- ✓ Remember that the **Projected Sales** logic orders [x] number of days' worth of stock, based on the sum of the average daily sales (ADS) for the days selected. It may be configured to exclude promotional sales, and you can 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.
 - Don't **Deduct SOO** if you don't perform invoice matching for the supplier, as the SOO value will be wrong.

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

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Hints and Tips

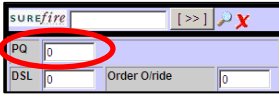



- ✓ If you are not able to resolve the issue after following these instructions, please contact SUREfire Support for further assistance.

8.	<p>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>	<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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2	COKE																			
5	COKE																			
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7	COKE																			
9.	<p>The item has a different default supplier to the one that the automatic order was generated for. <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>																			
10.	<p>The item hasn't sold in the period that average daily sales is configured to review.</p>	<table border="1"> <thead> <tr> <th>Week Starting</th> <th>Sales</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	Week Starting	Sales																
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11.	<p>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). <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>																			
		<input type="checkbox"/>																		

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 it would usually be ordered from. <i>*Set the default supplier on the Stock screen to the supplier that 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>									
12.	<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>									
		□								