Setting Up Suggested Order Plans

After creating a **Sales Forecast** and an **Order Point Plan**, the next step is to create a **Suggested Order Plan** that can create purchase orders for multiple stores or suppliers.

The workflow uses **Order Point Plans** and the **Sales Forecast Configuration** to generate Suggested Orders.

In this course, we will demonstrate creating a suggested order plan and set up suggested order options for that plan.

Objectives

- Suggested Order Plan
- Suggested Order Options

Suggested Order Plan

To create a suggested order, you must configure a *suggested order plan*.

This involves choosing the *right* suppliers, item categories, and stores to include.

From the main menu, click **Purchasing** and then **Automated Orders**.

Click **Suggested Orders**.

Use the **Search** field and the available filters, to view *existing* order plans.

Click **Search**.

Click **Add New** to add a new suggested order plan.

Enter a unique name and a short description.

Choosing an order *method* determines how the suggested order will identify items to include.

 If **Available Defective Quantity** is selected, only the items with a defective quantity are included.

The **Order Points** option uses the order point values of the item. You should set up an **Order Point Plan** *before* you use this option.

When you run an Order Point Plan, the included items are given *order point values*.

Suggested orders use *these* order point values to calculate the *order quantity* of each item.

For example, if the Quantity on Hand of an item is 10 and the order point is 20, the *suggested* quantity of the item will be 10.

If you select **Replenishment**, the order quantity is based on sales history.

This option displays the **Last Number of Days Sales** field.

If you enter 10, the amount sold during the last ten days is the suggested order quantity.

The **Round to Next Purchase Unit/OM** toggle and the **When At** field are used together.

Consider an item with an order *multiple* of 12 and an order *point* of 20.

The order multiple value is *subtracted* from the order point value, so this result is 8.

Then *that* value is compared with the *percentage value* entered in the **When At** field.

In this case, 80%.

If 8 was at least 80% of the order multiple, 12, the suggested quantity would be rounded up to the next order multiple which would be 24.

8 is *not* quite 80% of 12. So, the suggested order quantity remains at 12.

Select specific stores if you want to distinguish orders based on branch.

Use *this* toggle to choose to include or exclude your selection.

In the **Suppliers** section,

Click *this* icon to filter your search results and click the **Search** icon.

Select one or more suppliers using the checkbox.

Similarly, select item *categories* to include or exclude in the order plan.

You can also include or exclude *discontinued items*, *store closeout items*, *non-stock items*, and *special order items*.

Click **Save**.

You are redirected to the **Suggested Order Form** screen.

The configured order plan is displayed in *Order Configuration*.

Click the *Edit Suggested Order Configuration* link to edit the order plan.

Click the left arrow icon to hide the order configuration and get a full view of **Suggested Order Other Options**.

Suggested Order Options

In **Suggested Order *Other* Options**, we set up the suggested order method and supplier parameters.

Before you run a suggested order you can select a status.

If you choose draft, no orders will be placed to the supplier until the status is manually changed to open.

Determine how negative QOH should be handled.

When you select **Treat Negative as 0,** the order point value *is* the suggested quantity.

If you select **Use Negative Values**, the negative value is added to the order point and *that* result is the suggested quantity.

For example, if the QOH of an item is -2 and the order point is 10, the *first* option calculates the suggested order quantity as 10 while the *second* option renders the suggested quantity as 12.

Choose to include primary, non-primary, or all suppliers.

You can select items based on their quantity on hand using *this* drop-down menu.

Choose to include items with zero quantity, any value, or items with values less than or equal to zero.

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Enter item tags you wish to include or exclude in these fields.

This field lets you add a minimum line cost for items with low cost.

If the QOH of an item is less than its order point, the system will round the quantity up by another order multiple until the extended cost is greater than the value entered here.

You can enter a location code range in the **From primary Location** and **To primary Location** fields.

Turn on these toggles to use *on order quantities*, *committed quantities*, and *season codes* in the calculation.

On order quantity is the quantity of an item in purchase orders that you haven't received yet.

Committed quantity is the quantity of an item that remains in the inventory, but you have committed its sale.

If you enable the **Use Season Codes** toggle, the items included in season codes are ordered only during the date range of that season.

In the **Ranking** section, you can select specific item ranks to include in the suggested order.

For example, you can exclude X items based on the ranking of units sold. It will eliminate ordering items with no sales history.

In **Supplier Minimum Options,** you can configure the options to meet supplier minimum terms.

Certain suppliers set a minimum order quantity for purchase orders. When these minimums are not met, you might have to pay extra charges.

To avoid it, you can use the options available in *this* section.

In the **PO Minimums** drop-down menu, choose a suitable option.

You can set a PO minimum for suppliers in the **Store Info** tab of the **Edit Supplier** screen.

Increase the order point of items by a certain percentage when the minimum is not met.

In the **Ranking** section, choose which item ranks' order points to modify.

Here you can choose A or B ranking on units sold so that you're not overstocked on slow moving items.

Click **Save**.

Use the **Schedule** button to schedule the plan or run it now.

Every time the order plan runs, it appears in the **Suggested Order History** screen.

Select the order plan using the checkbox and click the **Suggested Order Detail** button to view its details.

The **Purchase Order Summary** screen displays the details of the purchase orders created and the table displays the ordered items' detail.

Recap

Suggested orders create and send purchase orders to suppliers using sales data and order points. It reduces the risk of overstocking and keeps your best-selling items available for sale.

In this course, we created a suggested order plan and set up suggested order options. We also learnt how to configure supplier minimum options.

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