

How to use 'Forecast Purchase Orders' in EXO Business

What are Forecast Purchase Orders?

Forecast Purchase Orders are designed to improve speed and accuracy in re-ordering stock for your warehouse. Forecast Purchase Orders provide a view of your Stock position, Sales History, and Min/Max settings in determining what quantities to order.

Step 1 – Setup your Stock Min/Max Values

Go to the Stock Items -> Details 2 Tab

Click the 'Set by Location' button, then set Min & Max values for each Stock Location

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ock Code: 🛛	AIRFIL05		Desc	ription:PR	O-STLYE AIR	FILTER						
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Note:- Min / Max values are often calculated to based on sales volume and lead times from suppliers to ensure adequate stock is maintained.

Hint: This step can be time-consuming so could be approached a Supplier at a time so you can start using Forecast Purchase orders for each Supplier where Min/Max is updated.



Step 2 – Re-calculate Stock Requirements Statistics

Go to Utilities -> Stock Utilities -> Re-calculate Stock Requirements Statistics

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	Debtors Utilities		
	Sales Order Utilities		The state
[]	Stock Utilities		Recalculate Alternate Weighted Average Cost
-	Purchase Order Utilities		Setup Stock Batch Code
	General Ledger Utilities		Price Change Scheduler
	Bank Reconciliation		Price Update Utility
	Foreign Exchange Rate Variance Calculator	Γ	Re-calculate Stock Requirements Statistics
	GL Budgets		Stock Location Info
	Ledger Postings		StockTake
	Data Verification		Serial Number Tracking
	End Of Period		Setup Stock Batch Codes
			Setup Stock Serial Numbers

Click 'Recalculate'



Step 3 – Run Stock Re-Order Requirements Report (optional)

This step will provide a report for all Suppliers showing what needs to be ordered. If you already know what Suppliers you need to order from you can skip this step.

Go to Reports -> Stock Reports -> Stock Re-order requirements (calculation based)





Select a Stock Location and select from the Print /Preview / Export toolbar options (you can also choose one Supplier and choose to exclude items with zero sales)

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Select Location	Sydney 🔽
Select Supplier	
Hide Zero Sales	
Motopartz.com.au	

Result

The report is displayed showing each supplier, their items and the recommended order quantity.



Stock Re	order Requirements Repo	ort													
Location: 1 Supplier:	Sydney					T	'his report	is based up	on statistic	s generate	ed by running	the stock rec	quiremer	its calcu	lator utilit
·····································	Sector to the sector of the			Perio	d Sales				-		#******	Carrowene -	11210-	and the	Reord
Stock Code	Description	6	5	4	3	2	1	Cur	Avg	Total	Incoming	For Sales	Min	Max	Qty
1	SYDNEY PART MART														
BAT127HD	CHAMPION SILVER BATTERY - 127HD	1	10	5	7	10	1	10	5.67	16	0	1	20	30	15
NGKSPKCABL01	SPARK PLUG CABLES	0	2	0	0	15	0	o	2.83	43	0	0	20	30	0
WIPER01	STANDARD WINDSHIELD WIPER	0	7	2	0	0	0	0	1.50	59	0	0	10	40	0
WIPER02	TWINEDGE WIND SHIELD WIPER	4	5	0	0	0	0	0	1.50	51	0	0	10	40	0
AIRPRE01	AIR PRESSURE GAUGE	1	1	2	1	2	0	0	1.17	9	10	1	5	30	0

Step 4 – Process a Forecast Based Purchase Order

Go to Purchases -> Forecasted Purchase Order

Select a Supplier and Stock Location then press 'Generate Stock Requirement for single Supplier' **Result**

Stock Items will be listed showing Sales History, Stock position, Min/Max and Order Now Qty

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Stock Code: \	WIPER01 Descrip	tion: STA														In Stock: 59
Supplier: 1. SYD	DNEY PART MART	Sto	ck Groups		_											
Location: 1. Svo	dnev	Prir	nary From		0.	MISC ITE	MS	•	To: 16. SPO	RTY SWEAT F	PANT 🔻					
✓ List	t all Supplier's Stock	Sec	Secondary From: 0. NO GROUP SELECTED V To: 0. NO GROUP SELECTED V													
Stock Requireme	ent Copy/Paste															
StockCode	Description	Sales0	Sales 1	Sales2	Sales3	Sales4	Sales5	Sales6	InStock	PurchOrd	SalesOrd	Fr Stock	Min	Max	Calc ReOrd	Order Now 🔺
BAT127HD	CHAMPION SILVER BATTERY	10	1	10	7	5	10	1	16	0	1	15	20	30	15	15
CHPSPKPLG01	CHAMPION SPARKPLUG - SINGLE	0	0	0	0	0	0	0	49	40	1	88	20	40	0	0
NGKSPKCAB	SPARK PLUG CABLES	0	0	15	0	0	2	0	43	0	0	43	20	30	0	10
WIPER01	STANDARD WINDSHIELD WIPER	0	0	0	0	2	7	0	59	0	0	59	10	40	0	0
WIPER02	TWINEDGE WIND SHIELD WIPER	0	0	0	0	0	5	4	51	0	0	51	10	40	0	8
AIRPRE01	Forecast based Functionaling File Utilities Navigate Help Image: Stand Structure Stru			0												
ANTSEI01	ANTISEIZE LUBRICATOR	0	0	0	0	0	1	1	5	10	1	14	10	60	0	0
Motopartz.com.a	au Stock	Requirem	ent Statist	ics last ru	n: 09:25	PM Tuesd	av 13 Ser	otember 2	2011							
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Order Now can be over-typed with your preferred quantity

When you're ready to convert this to a Purchase Order click the 'Post Order to Screen' icon on the toolbar.



Step 5 – Finalise and send your Purchase Order

On clicking 'Post Order to Screen' the standard Purchase Order screen id displayed with the Supplier and Items populated.

Purchase Orders	and the local division of		-							Σ
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Stock Code	Description	Qty Ord	Qty	Pack Price	@Price	Disc %	Supplier Code	Options	Due Date	1
BAT127HD	CHAMPION SILVER BATTERY - 1	15P of 1	15 (15	P) 45.87	45.8	7 0.0			15/09/2011	L
NGKSPKCABL01	SPARK PLUG CABLES	8P of 1	8 (8	P) 32.66	32.6	6 0.0			15/09/2011	
WIPERU2	ANTISETZE LUBRICATOR	10P of 1	10 (10	P) 7.99	14.0	9 0.0			15/09/2011	
ANTSELUT	ANTISEIZE LOBRICATOR	2P of 1	2 (2	P) 14.00	14.0	6 U.U			15/09/2011	
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TSEI01					Weight:	16	23 Sub Tot	al:	1,05	8.9
TISEIZE LUBRICATOR	Discounted Unit Price: 14.86	Pre-tax lin	e Total: 29.	72	Litem Cou	16. nt:	4 Order T	an: otal:	10	5.8 4.8
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in month										

You can still add / remove items and change quantities and prices before sending your purchase order.

You can also Cancel the order and go back to the Forecast Purchase Order screen.

When ready to send your Purchase order press Print or Save and Exit then print / email your purchase order as per your system setup.

Customisation Options

Momentum can alter the forecast order calculation to take into account stock transfers or other factors.

EXO allows Purchase order Authority Limits requiring Manager Authorisation

Momentum have developed an email authorization workflow that notifies Managers and Employees of orders to be approved