

## How to use 'Forecast Purchase Orders' in EXO Business

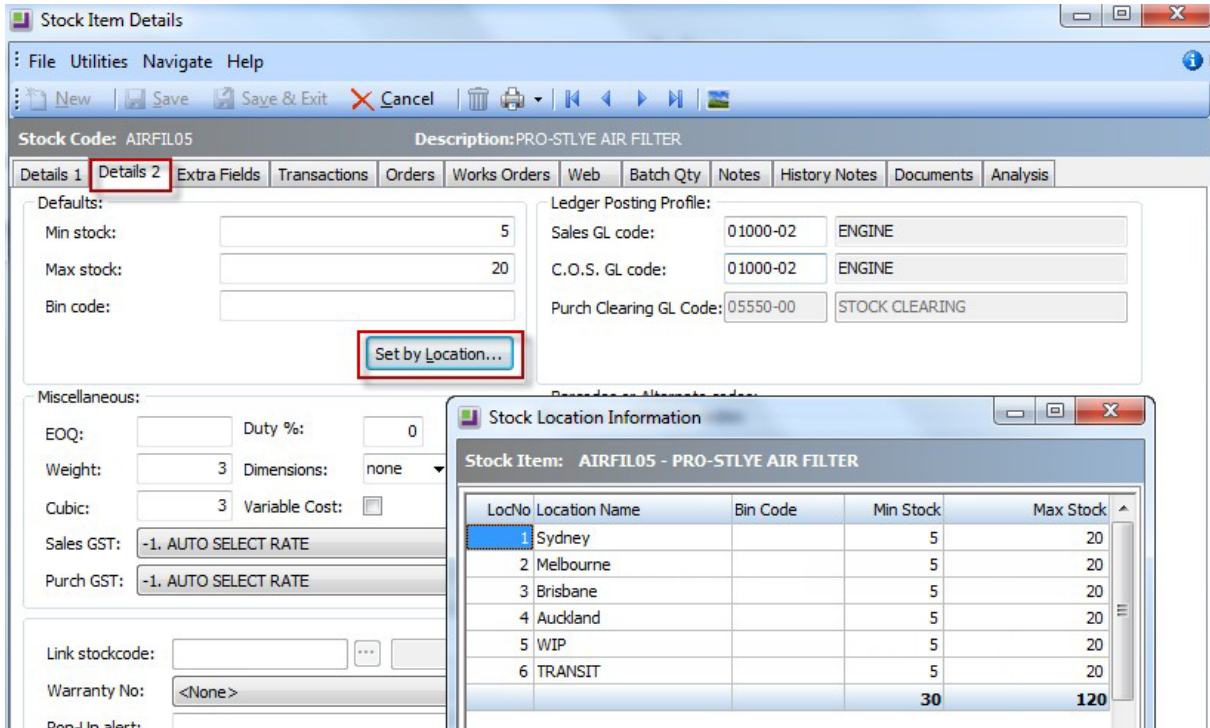
### What are Forecast Purchase Orders?

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



The screenshot shows the 'Stock Item Details' window for item AIRFIL05 (PRO-STLYE AIR FILTER). The 'Details 2' tab is selected. A 'Set by Location...' button is highlighted with a red box. An 'Stock Location Information' dialog box is open, showing a table of stock locations with their respective Min and Max stock values.

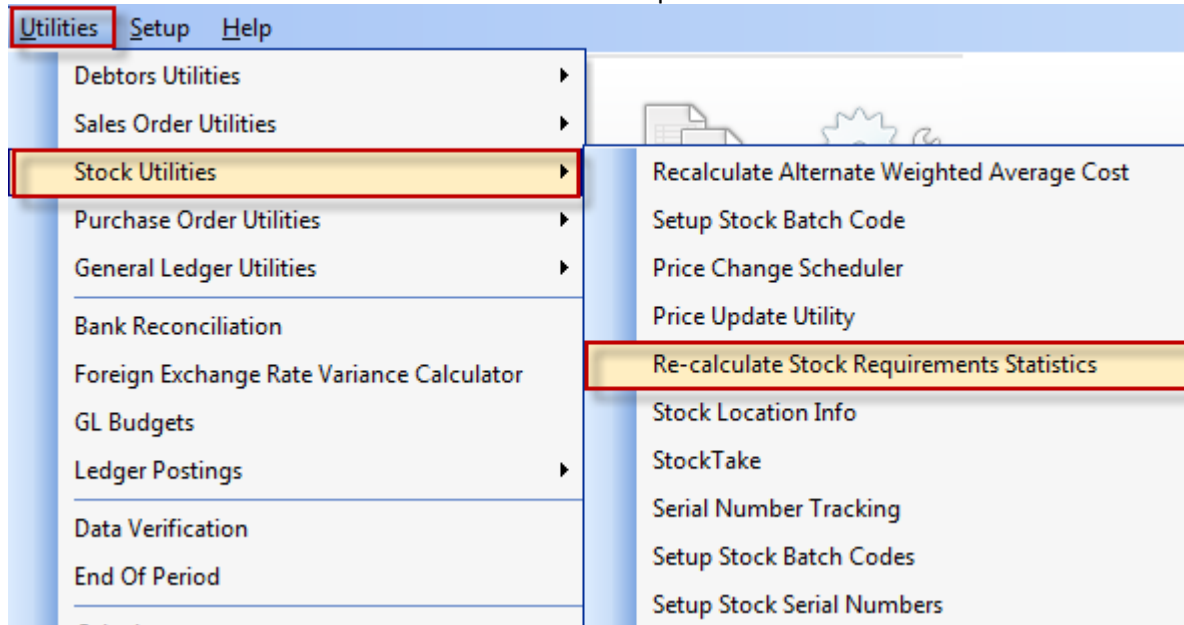
LocNo	Location Name	Bin Code	Min Stock	Max Stock
1	Sydney		5	20
2	Melbourne		5	20
3	Brisbane		5	20
4	Auckland		5	20
5	WIP		5	20
6	TRANSIT		5	20
			<b>30</b>	<b>120</b>

**Note:-** Min / Max values are often calculated to based on sales volume and lead times from suppliers to ensure adequate stock is maintained.

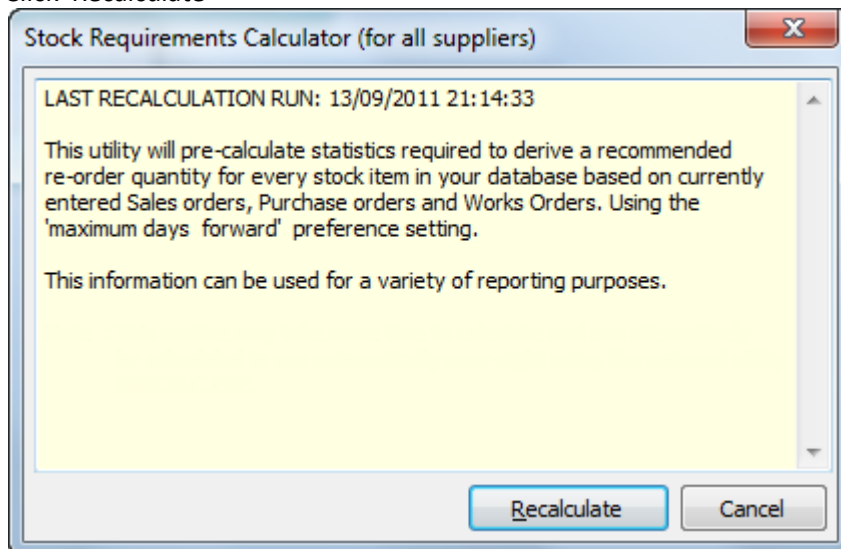
**Hint:** This step can be time-consuming so could be approached a Supplier at a time so you can start using Forecast Purchase orders for each Supplier where Min/Max is updated.

## Step 2 – Re-calculate Stock Requirements Statistics

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



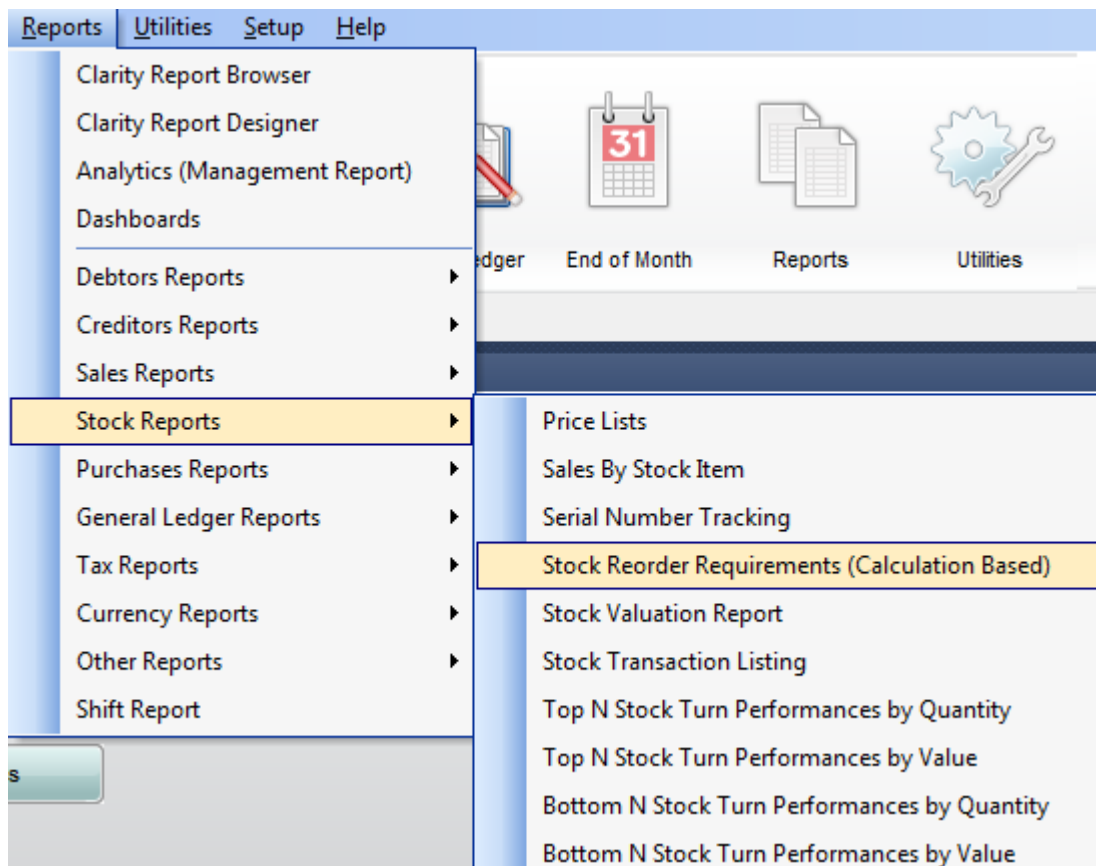
Click 'Recalculate'



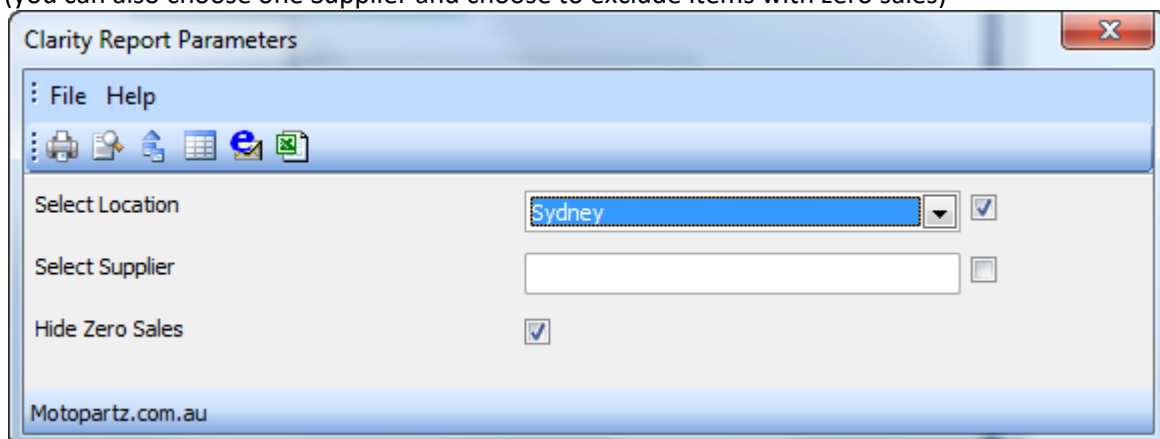
## Step 3 – Run Stock Re-Order Requirements Report (optional)

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)



**Result**

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

## Stock Reorder Requirements Report

Location: 1 Sydney  
Supplier:

This report is based upon statistics generated by running the stock requirements calculator utility

Stock Code	Description	Period Sales						Cur	Avg	Total	Incoming	For Sales	Min	Max	Reord Qty
		6	5	4	3	2	1								
<b>1 SYDNEY PART MART</b>															
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	0	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
ANTSEI01	ANTISEIZE LUBRICATOR	1	1	0	0	0	0	0	0.33	5	10	1	10	60	0

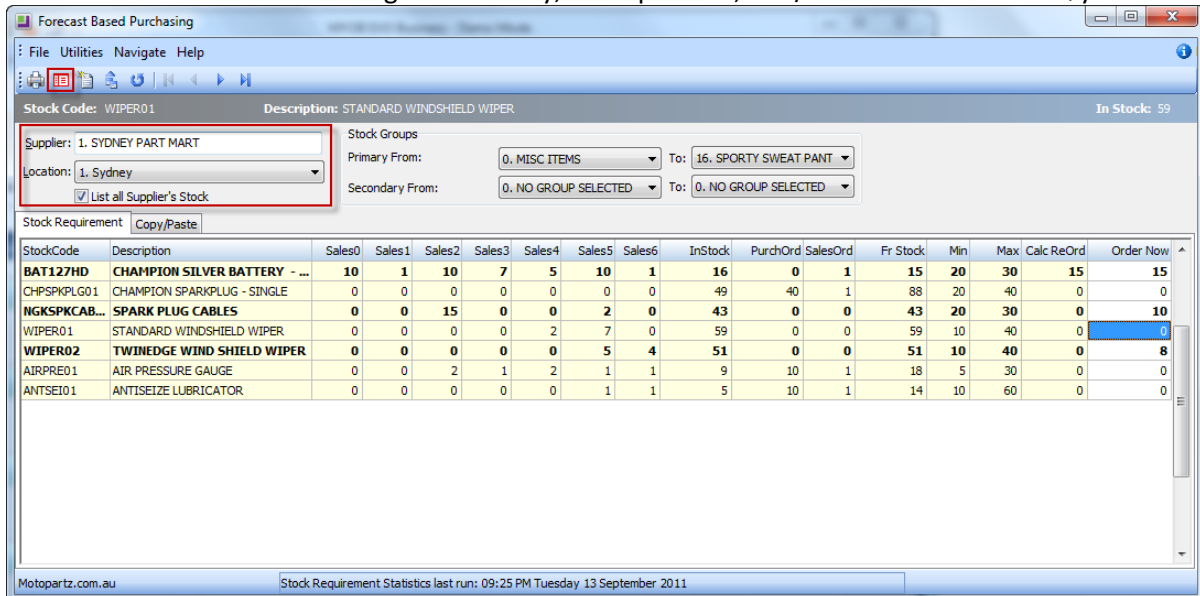
## Step 4 – Process a Forecast Based Purchase Order

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



The screenshot shows the 'Forecast Based Purchasing' application window. The 'Stock Code' is WIPER01 and the 'Description' is STANDARD WINDSHIELD WIPER. The 'Supplier' is 1. SYDNEY PART MART and the 'Location' is 1. Sydney. The 'In Stock' quantity is 59. The window displays a table with columns for StockCode, Description, Sales0 through Sales6, InStock, PurchOrd, SalesOrd, Fr Stock, Min, Max, Calc ReOrd, and Order Now. The 'Order Now' column is highlighted in blue for the WIPER01 row, showing a value of 0.

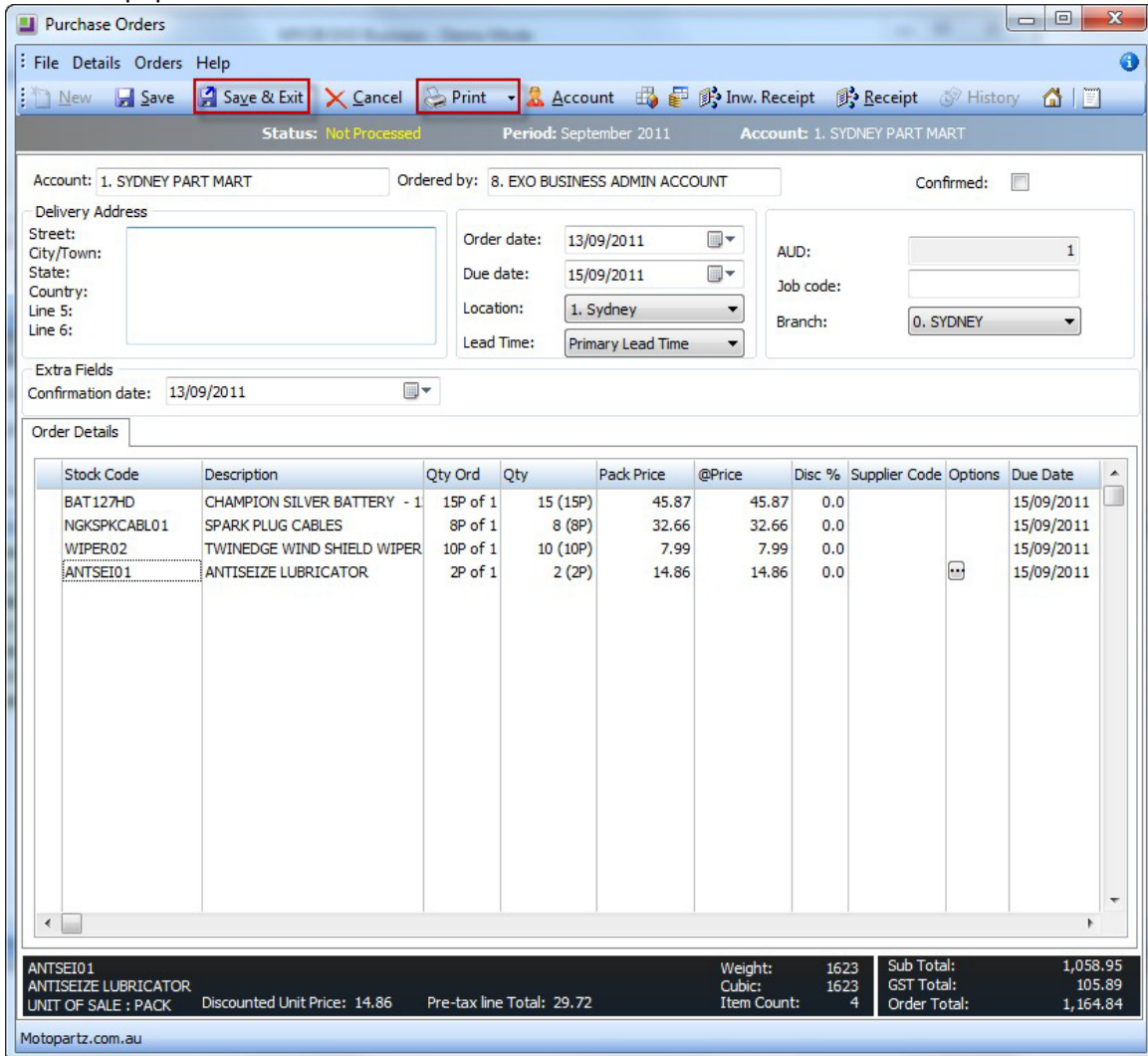
StockCode	Description	Sales0	Sales1	Sales2	Sales3	Sales4	Sales5	Sales6	InStock	PurchOrd	SalesOrd	Fr Stock	Min	Max	Calc ReOrd	Order Now
BAT127HD	CHAMPION SILVER BATTERY - ...	10	1	10	7	5	10	1	16	0	1	15	20	30	15	15
CHPSPKPLG01	CHAMPION SPARKPLUG - SINGLE	0	0	0	0	0	0	0	49	40	1	88	20	40	0	0
NGKSPKCAB...	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	AIR PRESSURE GAUGE	0	0	2	1	2	1	1	9	10	1	18	5	30	0	0
ANTSEI01	ANTISEIZE LUBRICATOR	0	0	0	0	0	1	1	5	10	1	14	10	60	0	0

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 is displayed with the Supplier and Items populated.



Stock Code	Description	Qty Ord	Qty	Pack Price	@Price	Disc %	Supplier Code	Options	Due Date
BAT127HD	CHAMPION SILVER BATTERY - 1	15P of 1	15 (15P)	45.87	45.87	0.0			15/09/2011
NGKSPKCABL01	SPARK PLUG CABLES	8P of 1	8 (8P)	32.66	32.66	0.0			15/09/2011
WIPER02	TWINEDGE WIND SHIELD WIPER	10P of 1	10 (10P)	7.99	7.99	0.0			15/09/2011
ANTSEI01	ANTISEIZE LUBRICATOR	2P of 1	2 (2P)	14.86	14.86	0.0			15/09/2011

ANTSEI01	ANTISEIZE LUBRICATOR	Weight: 1623	Sub Total: 1,058.95
UNIT OF SALE : PACK	Discounted Unit Price: 14.86	Cubic: 1623	GST Total: 105.89
	Pre-tax line Total: 29.72	Item Count: 4	Order Total: 1,164.84

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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