Creating A Template

Overview

Creating templates is a 5 step process as shown in the screenshot above. To begin just click on left-hand menu option "Order Generation" and choose "Order Generator". This will provide you with the screenshot above - not the tabs across the top. To create a new template, choose the table "Create New Template". When you're done with these 5 steps - your template will be added and available under the "Saved Template" tab.

Step 1 - Template Name

This is quite simple - just give it a name and if you like enter some notes to remind you what the purpose of the template was for later.

Step 2 - Select Stores

The second step requires you to select one or more stores which you wish to order for. You can use the normal region breakouts, custom regions, or even just a list of stores. You can combine the region selections and the stores chosen will be the intersection of stores present in all your selections.

Select the stores you want to order for - you can use any of the familiar options - but a custom region is always the most preferred by users here.

Step 3 - Select Order Criteria

This is the most involved step, it involves choosing the basic rules by which the computer will attempt to generate orders.

Order Assembly Metric - this is required. Currently there are two options which dictate how the order is supposed to be tallied up. You can set minimums and maximum amounts for each - you can either build based on dollar value or super packs. For more information about super packs see Item Availability & Ordering Rules in the pack type section

Pack Type - You need to choose a Pack Type rule set to let the computer know what the minimum order multiples are etc. **Note:** You can change this value in any saved template later.

Order to X WOS - One of the key drivers of the automated order is the WOS (Weeks of Supply) metric. This tells the computer to target x number of weeks of expected demand. Since demand changes during this year, this metric can remain constant and the amount needed to fulfill it will change. For high volume products where multiple orders are placed each week, this number will likely be 1 or less. For slower selling lines, you may wish to satisfy enough to cover the duration between re-orders. **Note:** You can change this value in any save template later.

Zero-Out < X % of Min Units: This is simply a helper setting. When the computer attempts to generate an order, the minimum amount you set in step 2 may or may not be met. If a store only needs some items, its possible the computer will stop before it can reach your minimum. In some instances you may wish to manually adjust partial orders to reach the valid minimum afterward, in cases where the order is only a small fraction of the target - say 25% or less - you may wish to have the computer just give up and zero out the order to save you time. This setting lets you configure the 25% level to be whatever percent you wish.

Example - if Min Units = $1000, then setting this to 50% means any order that could not reach at least $500 in needed product would be rolled back. Any order above $500 would be retained allowing you to manually "finish off" the order if desired.

Remove Zeroed Orders?: This setting in conjunction with the above setting tells the generator to discard and don't even display stores that could not reach your threshold. This makes the results smaller and more concise while eliminating failed order noise data.

Limit on WH Inventory?: This is a key setting - if you choose "YES" then the computer will not order more units that are stated in the warehouse inventory. This ensures that if more than one person is ordering or multiple templates are run - if inventory is exhausted, you won't "over write" your available inventory. Setting this to "NO" will order whatever is deemed appropriate and will not pull the inventory away from other users.

Hide Out-of-Stock WH Items?: This causes the results for any item which is not in stock in the warehouse is either shown or hidden. This can cut down on the number of rows in the results.

Use Presence Qtys?: This lets you take into account or ignore the market availability presence quantity recommendations.

You can limit the items being considered to only include items in an item group or a CSV list of items. Show below - this lets you order certain products while ignoring items which may be needed.

(Optional) Filter/Limit By Item Group

Click to filter ▼

(Optional) Filter/Limit By Specific Item Number(s)

Enter any number of item number here separated by commas.

You can also choose to order by super pack rounded multiples as well. This is useful when looking to ship full rack quantities. To utilize this you'll need to designate one of your 24 item categories to hold items where the shared value for a category indicates the items can be ordered evenly on a rack together. Choosing this category in the dropdown will force the order writer to increment or decrement order quantities to round to the nearest "Super Pack" when this is used.

Super Pack Category Grouping (Optional)

Change Category ▼

Super Pack Round Threshold

< 50 percent ▼

Step 4 - Select Warehouse Source

This is simple, but important. If you're generating orders, we need to know where its coming from to judge if the inventory exists or not.

| Ordering Overview | Create New Template | Saved Templates | User Preferences | Shared Templates | Warehouse Inventory |

Step 1 - Provide A Name For Order Template

Step 2 - Select Region To Generate Orders

Step 3 - Set Order Criteria

Step 4 - Select Warehouse Item Availability

SCG - SCG
PVF - PVG

[Next]

Instructions:

This is the easiest choice. Pick where your product will come from. This limits the products to available inventory for you. We take care of the rest

As soon as you do, we'll send you to step 5 to customize by item.

Step 5 - Finish/Save Template

Step 5 - Save The Template

This is what a saved Template will look like:

Template Name	Template Details	Template Actions
DF Test	Notes: No notes made.	[Run Template GUI]
(Template ID: 5d145c475a1eef8acde816886a2c175d)		[Copy Template]
(Created: 09/20/2021 01:47:57.)	Min Super Packs Per Order: **2**	
(Run Count: 16)	Max Super Packs Per Order (optional): **0**	[Remove]
(Avg Run Time:50 seconds.)	Order Items to **4** Weeks of Supply	
(Max Mem(MB):814.3 MB.)	Cancel Out Suggested Orders < **49%** of Minimum	[Order To Kits]
(Rows of Data:29,305.)	Return Zeroed Store Results: Yes	
(Store Count: 123)	Store(s): None.	[Check For Errors]
	Custom Region(s): Region 21	
	Limit on WH Inventory?: No	
	Use Presence Qtys?: No	
	Adhere To Max Qtys?: No	
	Warehouse: FL	
	Pack Type: Standard2021	
	Use SP Rack Name Prefix: No	
	Super Pack Category: Shelf Qty	
	Super Pack Round Up Threshold: 2%	
	Super Pack "Close Enough" Threshold: 80%	
	Hide WH Zeroes On Hand: No	
	☐ Shared Template?	

From this screen you can:

- Run Template GUI to create suggested orders
- Copy Template to make a copy of the template and rename it (useful for creating multiple templates with similar parameters)
- Remove (delete) a Template
- Order to Kits
- Check for Errors - this will check that the items you want to order are set up correctly; this is very handy for checking that you will be able to order all the items you want to order:

Template Errors ☐

Warning - some items in warehouse are not active in MP or 531 pricing availability: 2515912, 2806582, 2881819, 3768787, 99014 and therefore won't be kitted or ordered.

Items in warehouse inventory, not set up in master item list:3768787, 99014

Items in warehouse are not listed in pack type Standard2021:2806582, 2881819, 3108388, 3108410, 3768787, 99014

[Dismiss]