



Oneir Purchase Order - Order Guide

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This is a new feature that creates a feature similar to the existing Sales Order Guide but for Purchase Orders. This feature creates purchase orders based upon sales and return transactions posted in a user defined time period. It is a completely separate function from the pre-existing 'Generate Purchase Orders' which creates orders based on current stock levels.

The significant differences between the two features should be noted and reviewed before deciding to use either.

- a) The Purchase Order guide is merely a tool to automatically populate an order with the product codes with no quantities, matching predefined criteria.
- b) The Generate Purchase Order feature automatically creates groups of purchase orders for items based on the current stock level versus minimum stock, lead time, and order quantity.

If you wish to use the Purchase Order Guide, the first step is to activate and define the order guide.

1. In the Purchase Order utilities menu, choose "Set up job automation and purchase order guide".
2. The first question is "Generate POs and jobs from sales?" Leave the current answer (either Y or N) the same, it has nothing to do with the Purchase Order Guide set up.
3. Answer 'Y' for yes to the next question "Do you create an order guide in the purchase order?" This will turn the feature on so that it is available to be used. To turn it off, answer 'N' for no.

4. You will then be asked “How many months to look back (1-36)?”. This is the number of months to include in the sales/return data that will be used to determine what items will appear on the purchase order guide. Ex, if the number entered is 1, it will look back one month prior to the PO date. Ex. If PO date is 7 August 2015, only sales/return transactions between 7 July 2015 and 7 August 2015 will be used to build the order guide. If they enter 2 months, then the same PO would use 7 June 2015 to 7 August 2015 transactions, and so on.

That is all the set up and activation that is required. You may now start to use the feature.

When a PO is created (not when updating an existing PO) the first time a user enters the order detail screen, they will be asked, “Do you wish to create a purchase order guide?” If they answer yes, the order guide will be built. If they answer no, they will just start with a blank purchase order detail as normal.

If they choose to create the purchase order guide the program will go through the following steps to populate the order with suggested items for that vendor:

1. Read all Sales and Returns transactions, regardless of customer for the number of months defined in the set up.
 - a. If the net sales quantity (sales less returns) is positive, then the product is eligible to be placed on the order guide.
 - b. If the net sales quantity is negative the product will be ignored for order guide.
 - c. This is essentially the same formula as used for the Sales Order guide feature with the exception that this routine does NOT look at the customer at all.
2. From the eligible products (i.e. those with positive net sales), only those products with a primary vendor in INVPC that matches the Vendor on the PO will be added to the PO order guide. If the primary code is another vendor, the product will not be added to this PO with the order guide.
3. As with the Sales Order guide, the product will then be sorted by product line and a header comment added to the start of each product line there is a product for.
4. The Purchase Order detail screen will then be populated with the product codes, Unit of Measure (UOM) description, UOM factor, and purchase cost using all the same rules and routines that would be used if the code was typed manually. However the quantity ordered will be defaulted to 0 (zero).
5. Once the screen is populated, the user may make ANY changes that they wish. This includes, modifying the quantity, deleting lines/products, adding products, inserting lines, changing UOM description and factor, price and discounts. In other words all capability that they would have if they manually entered each product.

6. When the user exits and saves the order, all lines will be saved 'as is' with all comments and zero quantities saved. This differs from the Sales Order Guide as it is an extra step that Sales Order does not have.
7. When the PO is released (or printed and therefore automatically released as well), any items that are still at a zero quantity will not be saved to the PO. Any product line comments with no items saved on the PO will also be removed from the released order. At this point the remaining items with quantities will be placed 'on order' exactly as any other released PO would be.
8. Once the Purchase Order is released the Purchase Order Guide feature will have no impact at all. The Purchase Order is just another PO the same as one that was created manually or generated.

The last piece of the feature is a Purchase Order Guide report. This is a form that could be used to assist with entering the quantities to order for the items appearing on the order guide.

On the Purchase Order report menu choose "Print the Order Guide."

The criteria that the user may request are as follows:

Please specify vendor to start with?
 Please specify vendor to stop with?
 Start each vendor on a new page? Y/N

Please specify division to be printed?*

Please specify product line to be printed?*
 Please specify starting product code to be printed?
 Please specify ending product code to be printed?

Include purchase cost on report? Y/N

Sort by Product 'L'ine or Product 'C'ode?

*- Question supports wild card entries.

If the option to start each vendor on a new page is chosen, a page break will be created between each vendor sort. If the option is not chosen, the report will not have a page break inserted. The default answer is N.

Vendor code range will of course limit the report to the vendor range selected. The vendor code will be determined by the primary VPC for each item.

Product code range follows all normal rules for printing a product code range. (ie. Division Wild card limitations, etc.)

If the user chooses to print the purchase cost ('Y' for yes), the purchase cost will print. If the user answers N for no, it will not print the purchase cost.

The Purchase Order guide report will always do a first sort by vendor, using the vendor code identified as the primary VPC. The user may choose to do a secondary sort by product line or code. The default answer is 'L' or by Product Line, because it is the same sort option used by the order guide feature when populating the purchase order detail screen.

Each Vendor on the Purchase Order guide will begin with a heading that prints the vendor code and vendor name & address information. It will then print a header line:

If sorted by Product line:

PL Product	Product	Purch U	Qty +	Usage	Quantity
Description	Code	Cost M	Avail	/week	to Order

If sorted by Product Code:

Product Product	PL	Purch U	Qty	Usage	Quantity
Code Description		Cost M	Avail	/week^	to Order

+ Qty Avail = On hand – Comm – B/O

^ Usage /wk Is a multi-step formula.

- Determine the number of days the order guide is using by counting the number of days between the current date and the first date included in the range. (Uses number of months defined in set up)
- Divide number of days by 7 to arrive at the number of weeks included in the order guide.
- Divide net sales by number of weeks.

For example, if the report date is 7 August 2025 and the order guide looks back 1 month to 7 July 2025.

Number of days= 31

$31 / 7 = 4.428$ weeks

Net sales for the item for the 31 days are 100

$100 / 4.4238 = 22.58$

Which is then rounded to 22.6 units under Usage/wk.

“Qty to Order” will not provide a calculated amount, merely a blank line where a clerk can handwrite in the quantity they wish to order.