Standard Operating Procedure (SOP): Processing and Updating Orders

Step-by-Step Instructions:

1. **Update Excel Files:**

   o Update the following data in \TraxData\BackupData: DBM data, Sale Loss, Stock, Pipeline, and Sales Forecast.

2. **Refresh Excel Files with Power Query:**

   o Refresh the following Excel files in \TraxData\ using Power Query: DbmMonthlyData, SaleLoss, and Stock.

3. **Update Trax Database:**

   o Update the Trax Database and then export the Order Data to Excel.

4. **Refresh TraxSight Dashboard:**

   o Refresh the TraxSight Dashboard.

General Guidelines for Using the Order Sheet:

1. **Update FOB/Unit Value:**

   o Use VLOOKUP to update the latest FOB/Unit value for each item (If the system doesn't have FOB values).

2. **Recalculate Order Value:**

   o Calculate the Order Value by multiplying FOB/Unit by Order Quantity (OrderQty) to obtain the LC value.

3. **Check for Dead Movement Type:**

   o If OrderQty > 0 but MovementType is Dead, this is due to SaleLossQty. Check for TotalFrequency and include such items in the order only if TotalFrequency is high; otherwise, exclude them.

4. **Check for Slow Movement Type:**

   o If OrderQty > 0 but MovementType is Slow, this is also due to SaleLossQty. Check for TotalFrequency and include such items in the order only if TotalFrequency is high; otherwise, exclude them.

5. **Manual Inclusion of Items:**

   o For the manual inclusion of items due to demand, new models, or other reasons, please revise the OrderQty and recalculate the OrderValue.