NAVEKSA

ItemPlanning

- Inventory availability on a single screen cockpit with real time information

- Bill of material examination – identify component shortages for your production order.

- Inventory simulation and result display

- Shortage control with assembly bill of materials

- Critical item's function – Pinpoint items with demand/ supply imbalances

- Salesperson can check status of delivery time.
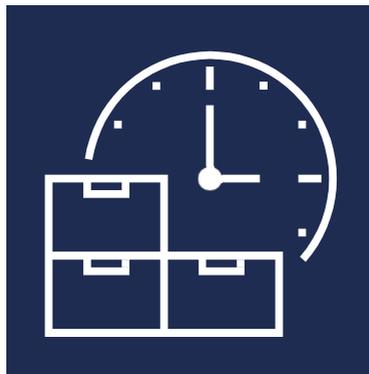
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Itemplanning – Installation and First time setup

1. Order a license key to be able to run app for production purposes by writing to Naveksa at support@naveksa.com

2. If for a BC Cloud download the app from Microsoft AppSource.
   You can get it here clicking the Free trial button:
   https://appsource.microsoft.com/da/marketplace/apps?search=naveksa&page=1

3. If for an On-premise go to our Help center and download the app.
   a. https://www.dropbox.com/home/NAVEKSA%20TEAM/Teknik/Software/Releases/2023/ItemPlanning
   b. Installation is done by the common PowerShell commands exactly like any other BC App.
   c. Please notice you must create yourself as a user, or sign into our Help desk before you can download.

4. Insert the license key in the ItemPlanning setup display, in the field General

5. Run the Setup or go straight to the ItemPlanning setup display.
   a. Here you can find the detailed explanation of each field:
   https://www.manula.com/manuals/naveksa/installation-and-setup-guide/1/en/topic/itemplanning
   b. Please pay attention to setup the following fields correctly:
      BOM Calculation Gross/Net

6. You are ready to go and work with planning of items for purchase, production and sales.
   Use the detailed manual to find out how it works.
   https://www.manula.com/manuals/naveksa/itemplanning/1/en/topic/itemplanning-user-guide

Itemplanning – Introduction

Itemplanning is a strong tool for Purchasing Agent, Production Planner and Sales person, to obtain knowledge of the current situation for production orders and stock availability

Two possible roles are available for Itemplanning
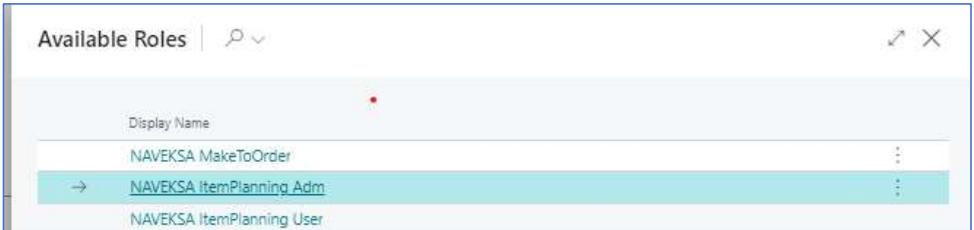
• Itemplanning Adm has permission to make setup and various changes.

• Itemplanning User is intended for the daily user, e.g., purchaser and production planner

Each role contains a various number of menues to help the user.

Itemplanning Adm.

Itemplanning User

Itemplanning item is a function that can be used of more roles

Itemplanning item:

Collecting data from the whole company (sales, purchasing, production, warehouse) and displays an inventory status for all planned transactions

Open the item to be investigated- in this case HC200

In the field type it is possible to put in different filters, ie Sales or Purchasing

ItemPlanning goes through the entire list (sales, purchases, production, forecast, etc.) date-wise.

The Independent/Dependent Demand column shows the quantity to use in descending date order.

Approaches are real orders (Sale, Purchase, Production)

Red numbers indicate orders overdue and require action to be taken, e.g., informing the customer about delays in relation to the desired delivery time.

The Inventory value column tells how much the value of the inventory value is and can, for example, be useful when simulating quantities for purchases, where you can immediately see how large the expense will be. The same applies to the inventory column, where you can see current quantities in stock on a given date.

Simulation: What happens if I change the date or quantity? What impact does it have on delivery time, stock value, etc. This function can be used before starting a production to know the" consequence" of the action

Simulate Qty.	Stock Value	Simulate Date
	20.880,00	
5	33.930,00	14-04-2023
100	294.930,00	14-04-2023
200	816.930,00	14-04-2023
5	803.880,00	18-05-2023
200	281.880,00	01-08-2023
50	151.380,00	04-08-2023

Itemplanning – How to use for Production Planner

ItemPlanning BOM

CRONUS Danmark A/S | Journals

ItemPlanning - Item   ItemPlanning - BOM

Only items with BOM is displayed (purchased items are not displayed)

The column in the right side of the screen is a fact-box, which gives information of ie Minimum order size, meaning that you don't need to check the item card.

Our demo product, HC200 consists of: AC200
AC300
AC400 (purchased item)

The field Explode offers several options, e.g. BOM single/Multilevel and main routing

Explode	Single level BOM	∨

Explode	Multi-level BOM + Main routing	∨

ItemPlanning - BOM

ItemPlanning - BOM

🗐 Update ItemPlanning 🗐 Create Order Proposals... 🗐 Apply Template... 🗐 Requisition Worksheet 🗐 Planned Production Orders 🗐 Assembly Orders 🗐 Item Journal 🗐 Item Reclassification Journal 🗐 Item Tracing 🗐 Statistics   More options

General   Show less

No.	HC200	Calculate for qty.	0	Explode	Multi-level BOM + All routings ∨
Description	Hydraulic cylinder	Qty. in Prod.order	305	Show component lines short on r...	⬤
Active Version		Qty. to build	0	Show component lines short only...	⬤
Required Quantity	1	Select for Create Order (Proposal) ⬤		Show Repl.System	All ∨
Required Date	17-08-2023 📅	Select all Lines for Create Order (... ⬤		Show Planning Worksheet data	⬤
Starting Date Capacity calc.	📅	Available Date (mat.)		Exclude Purchase	⬤
Inventory on Location	8	Critical Item		Exclude Production orders	⬤
		Available Date (cap.)			

Lines   Line   Fewer options

Component / Operation	Description	Select...	Vendor / Center	Level	Replenish... System	Expl. BOM	Expl. Route	Actual Stock	BOM / Route Qty	BOM Demand	Required Date Free stock	All Dates Total Stock	Avail.Lead	Qty in Purchase Order	Avail.Order	Starting Date	Ending /
010	Final assemply	☐	100	0	Route	☐	☐	0	1	0	0	0		_		17-08-2023	17-08-
020	Final Quality Control	☐	200	0	Route	☐	☐	0	1	0	0	0		_		17-08-2023	17-08-
AC200	Cylinder barrel for series 200	☐		1	Prod.Order	☑	☑	16	2	0	18	18		_		17-08-2023	17-08-
010	Dreje komplet	☐	400	1	Route	☐	☐	0	2	0	0	0		_		17-08-2023	17-08-
020	Færdiggøre	☐	200	1	Route	☐	☐	0	2	0	0	0		_		17-08-2023	17-08-
BC200	Cylinder head for series 200	☐		2	Prod.Order	☑	☑	16	1	0	16	16		_		17-08-2023	17-08-
010	Subcontracting	☐	805	2	Route	☐	☐	0	1	0	0	0		_		17-08-2023	17-08-
CC200	Sealing for series 200	☐	50000	3	Purchase	☐	☐	20	1	0	-592	-592	19-08-2023	_	05-12-2022	17-08-2023	17-08-
010	Subcontracting	☐	805	3	Route	☐	☐	0	1	0	0	0		_		17-08-2023	17-08-
AC300	Piston for series 200	☐		1	Prod.Order	☑	☑	8	1	0	8	8		_		17-08-2023	17-08-
010	Dreje komplet	☐	400	1	Route	☐	☐	0	1	0	0	0		_		17-08-2023	17-08-
020	Færdiggøre	☐	300	1	Route	☐	☐	0	1	0	0	0		_		17-08-2023	17-08-
BC300	Bolt for series 300	☐		2	Purchase	☐	☐	0	5	0	-1.525	-1.525	17-08-2023	_		17-08-2023	17-08-
→ AC400	Steel for series 200	☐	50000	1	Purchase	☐	☐	0	0,5	0	158	158		311	30-04-2023	17-08-2023	17-08-

If 0 is displayed in the column BOM Demand stock for the item is available.

If the demand changes to a higher quantity than we have in stock, quantities are displayed in the column

Required date Free stock in red numbers.

Required date Free stock covers the exact date opposite All Dates Total stock.

Required Date Free stock	All Dates Total Stock
0	0
0	0
18	18
0	0
0	0
16	16
0	0
-592	-592

Starting /Ending date displays the date of Start/End for the individual operation.

Available day (mat) is the first possible start date
Critical item displays which item is the most critical and when it is available in the warehouse
Available date (cap) displays first possible delivery date for quantity xx of a given item if you start production on available Mat.date

Available Date (mat.)	
Critical Item	
Available Date (cap.)	

Quantity to build displays the quantity we are able to produce right now

Qty. to build	0

Show component lines short on r… displays only lines with shortage on the required date
Show component lines short on all dates displays only lines with shortage on all dates

Show component lines short on r…	
Show component lines short only…	

ItemPlanning - BOM

ItemPlanning - BOM

🔄 Update ItemPlanning ⊕ Create Order Proposals... ⧉ Apply Template... 📋 Requisition Worksheet 📋 Planned Production Orders 📋 Assembly Orders 📋 Item Journal 📋 Item Reclassification Journal 📋 Item Tracing 📊 Statistics | More options

General Show less

No.	HC200	Calculate for qty.	0	Explode	Single level BOM
Description	Hydraulic cylinder	Qty. in Prod.order	305	Show component lines short on r...	⬤
Active Version		Qty. to build	0	Show component lines short only...	⬤
Required Quantity	1	Select for Create Order (Proposal)	⬤	Show Repl.System	All
Required Date	17-08-2023	Select all Lines for Create Order (...	⬤	Show Planning Worksheet data	⬤
Starting Date Capacity calc.		Available Date (mat.)		Exclude Purchase	⬤
Inventory on Location	8	Critical Item		Exclude Production orders	⬤
		Available Date (cap.)			

Show repl.System can be used to filter what you want to see, ie items for production

Show Repl.System	Prod. Order only

Lines | Line Fewer options

Component / Operation	Description	Select	Vendor / Center	Level	Replenish... System	Expl. BOM	Expl. Route	Actual Stock	BOM / Route Qty	BOM Demand	Required Date Free stock	All Dates Total Stock	Avail.Lead	Qty in Purchase Order	Avail.Order	Starting Date	Ending
AC200	Cylinder barrel for series 200	☐		1	Prod.Order	☐	☐	16	2	0	18	18	–			17-08-2023	17-08-
AC300	Piston for series 200	☐		1	Prod.Order	☐	☐	8	1	0	8	8	–			17-08-2023	17-08-
AC400	Steel for series 200	☐	50000	1	Purchase	☐	☐	0	0,5	0	158	158		311	30-04-2023	17-08-2023	17-08-

It is possible to create order proposals (purchase and production orders) directly from Itemplanning BOM, once it is selected (green in the field Select for Order Proposals)

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Press Order proposals and next Update Itemplanning and you can go directly to purchase/prod.orders

Itemplanning - How to use for Purchasing Agent

Itemplanning Critical items

Set filter to Calculate until (date) and Negative stock (alternatively Reorder Point or Safety Stock)

Press OK and a total list of items with shortage is displayed. When setting the date remember to take delivery into account. In the example all items with shortage before 17-08-2023 are displayed

ItemPlanning Critical Items

🔍 Search   Manage

No. ↑	Description	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.	Starting Inventory	Calculated Inventory - End Date	Calculated Inventory - Lowest	Calculated Inventory - Highest
1100	Fabricated Item	STK	0,00	0,00		58	-33	-33	67
1200	Purchased raw material	STK	50,00	0,00	40000	0	5.236	-936	5.264
1300	Purchased component	STK	10,00	0,00	40000	-9.952	-1.884	-9.952	9.992
1400	Purchased component 14	STK	7,50	0,00	50000	-9.952	-4.657	-9.952	9.980
1900-S	PARIS Gæstestol, sort	STK	835,00	1.071,00	20000	-20	-40	-48	0
1953-W	Gæstesektion 1	STK	0,00	6.693,00		-49	-49	-49	0
1965-W	Konferencebundt 2-8	STK	0,00	1.299,00		-81	-81	-81	0
1969-W	Konferencepakke 1	STK	0,00	1.899,00		-7	-7	-7	0
2000413	FRB-3 <2"X2"X1/4"X 1 3/4"	PCS	0,00	0,00		0	-10	-10	0
200043RAW	FRB-3 <2"X2"X1/4"X 1 3/4" RAW	PCS	10,00	0,00		0	-10	-10	0
200053RAW	MRB BAR 3/16"X 4"X 4" RAW	PCS	20,00	0,00		0	-30	-30	0
200060RAW	RRB-6 BAR 3/16X4X 6 1/2" RAW	PCS	30,00	0,00		0	-5	-5	0
4172	Side pannel for alignment conveyor, Cable side.	PCS	0,00	0,00		0	-1	-1	0
4207	Corner fixing for stop plate	PCS	0,00	0,00	20000	0	-8	-8	0
4240	Side pannel for alignment conveyor, belt side.	PCS	0,00	0,00		0	-1	-1	0
6401	Side pannel motor side, Weld.	PCS	0,00	0,00	10000	0	-2	-2	0
6402	Side guide belt side Weld.	PCS	0,00	0,00	50000	0	-2	-2	0
AC400	Steel for series 200	LBS	60,00	0,00	50000	0	158	-153	158
BC300	Bolt for series 300	PCS	0,00	0,00		0	-1.525	-1.525	0
CC200	Sealing for series 200	PCS	55,00	0,00	50000	20	-592	-592	20
HC200	Hydraulic cylinder	PCS	2.610,00	0,00		8	-315	-315	313
RVH GRN	Granules type RVH	LBS	0,00	0,00		0	-14	-14	0

If you want to see shortage for a specific item, set the filter with the item number, here HC200.

Calculate critical Items   ↗ ✕

Use default values from .... Last used options and filters   ⌄

Options

Show Planning Worksheet data .... ⬤◯

Calculate until 18-08-2023   📅

Parameter for item selection ...... Neg. stock   ⌄

Filter: Item

✕ No. .... HC200   ⌄

✕ Inventory Posting Group ....   ⌄

✕ Gen. Prod. Posting Group ......   ⌄

✕ Replenishment System ....   ⌄

+ Filter...

Filter totals by:

+ Filter...

Only shortage for item no HC200 is displayed

| Schedule... | OK | Cancel |

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Pushing the item number will lead to Itemplanning Item and the dates of upcoming shortage is displayed.

It is possible to set a filter in the column Type depending on what you want to see. (purchase, production etc)

Itemplanning - How to use for Sales person

Itemplanning Sales

" Can we deliver this item at the agreed time?"
Select Itemplanning Sales from the menu
and a list of all sales orders is displayed

Example 1:

Sales order 101018 is missing one component to adhere the Promised time of delivery.

Pressing Show sales Order direct you to the sales order, where all information regarding the customer is available, enabling an immediate contact.

If a new date of delivery is agreed with the customer, it can be set in the field New sales Delivery Date in the right column and by pressing Update Sales order Date the new delivery date is registered on the sales order in BC. System will ask if all or only actual sales line is updated.

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ItemPlanning - Sales

ItemPlanning - Sales

📇 Show Sales Order   📇 Update Sales Order Dates

Example 2:
In sales order 101024 there is a shortage for item number HC200. Red numbers will show which components are responsible for the problem.

ItemPlanning Sales Order Multi-select

In the same way you can look for more sales orders at the same time

A filter is set for Shipment date before 01.07. By using two spots before 01.07, multiple orders are displayed.

Sales analysis can be executed by pressing Actions -> Other -> Item analysis. Analysís of Sales orders with shortages in components will be performed across all order lines. Total number of missing components is displayed.

Filter can be added to sort for Negative free stock , Purchase, Production order

Sales analysis below. Items with shortage are marked with red numbers. Stock out date (the field in the right side) will show when then shortage will affect the sales order.

It is possible to get only sales orders with shortage displayed.

ItemPlanning - License renewal.

1. Order a license key to be able to run app for production purposes by writing to Naveksa at support@naveksa.com

2. Go to BC and open the ItemPlanning Setup.

3. Insert the new license key at the top of the page.

4. You are ready to go

ItemPlanning – Version update.

1. If for a BC Cloud the update follows the normal Rules for BC Cloud installation. If you need to download the app from Microsoft AppSource, you can get it here clicking the Free trial button:
   https://appsource.microsoft.com/da/marketplace/apps?search=naveksa&page=1

2. If for an On-premises go to our Help center and download the app.

   a. https://www.dropbox.com/home/NAVEKSA%20TEAM/Teknik/Software/...Releases/2023/

   b. Installation and update is done by the common PowerShell commands exactly like any other BC App.

   Nb.   Please notice you must create yourself as a user, or sign into our Help desk .... before you can download.

3. Go to the ItemPlanning setup display and check for new set up parameters if any mentioned in the release notes.

4. You are ready to go.