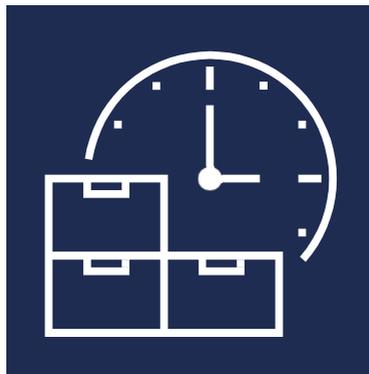


ItemPlanning

- 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>

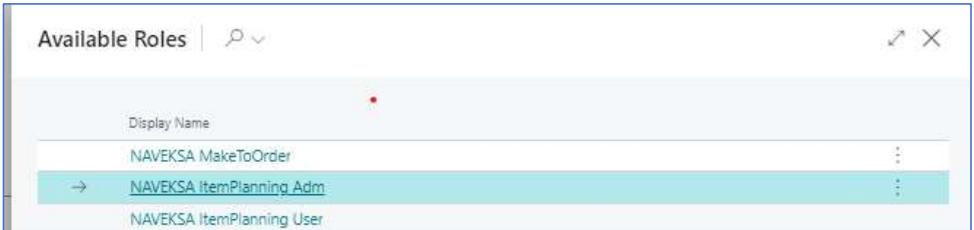




Itemplanning – Introduction

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 menus 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

No. I	Description	Subst/Use Site	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Cost B. Adjusted	Unit Cost	Unit Price	Vendor No.	Search Description
HC200	Hydraulic cylinder	No	No	HC200	HC200	PCS	75	2.610,00	0,00		HYDRAULIC CYLINDER
MSC_HC200	Hydraulic cylinder	No	No	MSC_HC200	MSC_HC200	PCS	85	3.080,00	0,00		HYDRAULIC CYLINDER



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.

No.	Description	Substitute Item	Assembly BOM	Production BOM	Routing No.	Base Unit of Measure	Costs Adjusted	Unit Cost	Unit Price	Vendor No.	Search Description
MSC00	Hydraulic cylinder	No	No	MSC00	MSC00	PCS	☑	2.610,00	0,00		HYDRAULISK CYL.
MSC_HC200	Hydraulic cylinder	No	No	MSC_HC200	MSC_HC200	PCS	☑	3.080,00	0,00		HYDRAULISK Cyl.

Item Details - Inventory	
Item No.	MSC00
Costing Method	Standard
Cost is Adjusted	Yes
Cost is Posted to GL	Yes
Standard Cost	2.610,00
Unit Cost	2.610,00
Overhead Rate	0,00
Indirect Cost %	0
Last Direct Cost	495,00
Profit %	0
Unit Price	0,00

Item Details - Planning	
Item No.	MSC00
Reordering Policy	Lot-for-Lot
Reorder Point	0
Reorder Quantity	0
Maximum Inventory	0
Overflow Level	0
Time Bucket	
Lot Accumulation Period	30
Rescheduling Period	
Safety Lead Time	
Safety Stock Quantity	0
Minimum Order Quantity	200
Maximum Order Quantity	0
Order Multiple	0
Dispenser Period	
Dispenser Quantity	0

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

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

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...

Active Version Qty. to build 0 Show component lines short only...

Required Quantity 1 Select for Create Order (Proposal) Show Rep. System All

Required Date 17-08-2023 Select all Lines for Create Order (Proposal) 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 Filter options

Component / Operation	Description	Select	Vendor / Center	Level	Replent. System	Est. BOM	Exp. Route	Actual Stock	BOM / Route Qty	BOM Demand	Required Date Free stock	All Dates Total stock	Avail. Lead	Qty in Purchase Order	Start Date	Ending I
010	Final assembly	<input type="checkbox"/>	100	0	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	1	0	0	0			17-08-2023	17-08-
020	Final Quality Control	<input type="checkbox"/>	200	0	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	1	0	0	0			17-08-2023	17-08-
AC200	Cylinder barre for series 200	<input type="checkbox"/>		1	Prod.Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	16	2	0	18	18			17-08-2023	17-08-
010	Dreje komplet	<input type="checkbox"/>	400	1	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	2	0	0	0			17-08-2023	17-08-
020	Færdiggøre	<input type="checkbox"/>	200	1	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	2	0	0	0			17-08-2023	17-08-
BC200	Cylinder head for series 200	<input type="checkbox"/>		2	Prod.Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	16	1	0	16	16			17-08-2023	17-08-
010	Subcontracting	<input type="checkbox"/>	805	2	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	1	0	0	0			17-08-2023	17-08-
CC200	Sealing for series 200	<input type="checkbox"/>	50000	3	Purchase	<input type="checkbox"/>	<input type="checkbox"/>	20	1	0	-592	-592	19-08-2023	05-12-2022	17-08-2023	17-08-
010	Subcontracting	<input type="checkbox"/>	805	3	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	1	0	0	0			17-08-2023	17-08-
AC300	Piston for series 200	<input type="checkbox"/>		1	Prod.Order	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	8	1	0	8	8			17-08-2023	17-08-
010	Dreje komplet	<input type="checkbox"/>	400	1	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	1	0	0	0			17-08-2023	17-08-
020	Færdiggøre	<input type="checkbox"/>	300	1	Route	<input type="checkbox"/>	<input type="checkbox"/>	0	1	0	0	0			17-08-2023	17-08-
BC300	Bolt for series 300	<input type="checkbox"/>		2	Purchase	<input type="checkbox"/>	<input type="checkbox"/>	0	5	0	-1525	-1525	17-08-2023		17-08-2023	17-08-
AC400	Steel for series 200	<input type="checkbox"/>	50000	1	Purchase	<input type="checkbox"/>	<input type="checkbox"/>	0	0,5	0	158	158		311	30-04-2023	17-08-2023

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)	<input type="text"/>
Critical Item	<input type="text"/>
Available Date (cap)	<input type="text"/>

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

Qty. to build	<input type="text" value="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... ..	<input checked="" type="checkbox"/>
Show component lines short only... ..	<input type="checkbox"/>

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/Hide

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

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

Show Repl.System	<input type="text" value="Prod. Order only"/>
------------------------	---

Component / Operation	Description	Select	Vendor / Center	Level	Replish... System	Exp... BOM	Exp... 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	<input type="checkbox"/>		1	Prod.Order	<input type="checkbox"/>	<input type="checkbox"/>	16	2	0	16	16				17-08-2023	17-08-
AC300	Piston for series 200	<input type="checkbox"/>		1	Prod.Order	<input type="checkbox"/>	<input type="checkbox"/>	8	1	0	8	8				17-08-2023	17-08-
→ AC500	Steel for series 200	<input checked="" type="checkbox"/>	50000	1	Purchase	<input type="checkbox"/>	<input type="checkbox"/>	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)



ItemPlanning - BOM

Update ItemPlanning Create Order Proposals... Apply Template... Requisition Worksheet Planned Production Orders Assembly Orders Item Journal Item

General

No.	HC200	Calculate for qty.	0
Description	Hydraulic cylinder	Qty. in Prod.order	305
Active Version		Qty. to build	0
Required Quantity	1	Select for Create Order (Proposal)	<input checked="" type="checkbox"/>
Required Date	17-08-2023	Select all Lines for Create Order (...)	<input type="checkbox"/>
Starting Date Capacity calc.		Available Date (mat.)	
Inventory on Location	8	Critical Item	
		Available Date (cap.)	

Update ItemPlanning Create Order Proposals...

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

CRONUS Danmark A/S | Journals Worksheets Orders

ItemPlanning - Item ItemPlanning - BOM ItemPlanning - Critical Items

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

Calculate critical Items

Use default values from: Last used options and filters

Options

Show Planning Worksheet data:

Calculate until: 17-08-2023

Parameter for item selection: Neg. stock

Filter: Item

× No.

× Inventory Posting Group

× Gen. Prod. Posting Group

× Replenishment System

+ Filter...

Filter totals by:

+ Filter...

Schedule... OK Cancel

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





No. 1	Description	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.	Starting Inventory	Calculated Inventory - End Date	Calculated Inventory - Lowest	Calculated Inventory - Highest
1100	Fab/Cat'd 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	-1.584	-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 Gestetel, sort	STK	835,00	1.071,00	20000	-20	-40	-48	0
1953-W	Gaestesektion 1	STK	0,00	6.693,00		-49	-49	-49	0
1965-W	Konferensecabunkt 2-8	STK	0,00	1.299,00		-81	-81	-81	0
1969-W	Konferensecabikke 1	STK	0,00	1.899,00		-7	-7	-7	0
2000413	FRB-3 +2"X2"X14"X 1 3/4"	PCS	0,00	0,00		0	-10	-10	0
200043RAW	FRB-3 +2"X2"X14"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
BVH_GDN	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...

Schedule... OK Cancel

Only shortage for item no HC200 is displayed

10



ItemPlanning kritiske varer

Sag Administrator

Nummer	Beskrivelse	Beskrivelse	Kategori	Enhedspris	Lagerstatus	Zant lager	Beregnet lager - i stykker	Beregnet lager - Laveste	Beregnet lager - Højeste
HC300	Hydraulic cylinder	PC5	2.610,00	0,00		8	-625	-625	13

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 - Item

New Apply Template... Requisition Worksheet Item Journal Item Reclassification Journal Item Tracing Statistics Actions Related Automate Fewer options

General

No. HC300 Description 2 Hydraulic cylinder

Description Hydraulic cylinder Show Planning Worksheet data

Lines Line Fewer options

Date	Type	Location Code	Independent Demand	Sales Order No.	Customer/Vendor/Job Name	Purchase Supply	Production Order No.	MRP Planned Order	In and FC	Simulate Qty	Stock Value	Simulate Date	Item Relation	Variance Code
14-04-2023	Inventory		--			5	100326		13	5	33.930,00	14-04-2023		
14-04-2023	Production		--			100	100327		113	100	294.930,00	14-04-2023		
14-04-2023	Production		--			200	100328		313	200	616.930,00	14-04-2023		
18-05-2023	Sales		--	5 101027	Virk1	--	--	--	308	5	803.880,00	18-05-2023		
07-08-2023	Sales		--	200 101028	Lifeline, Inc.	--	--	--	198	200	281.880,00	01-08-2023		
04-08-2023	Sales		--	50 101024	Virk4	--	--	--	58	50	151.360,00	04-08-2023		
04-08-2023	Sales		--	100 101024	Virk4	--	--	--	-42	100	-109.620,00	04-08-2023		
04-08-2023	Sales		--	50 101024	Virk4	--	--	--	-92	50	-240.120,00	04-08-2023		
04-08-2023	Sales		--	200 101024	Virk4	--	--	--	-292	200	-762.120,00	04-08-2023		
17-08-2023	Sales		--	10 101026	Kontorcentrallen A/S	--	--	--	-302	10	-788.220,00	17-08-2023		
17-08-2023	Sales		--	5 101026	Kontorcentrallen A/S	--	--	--	-307	5	-801.270,00	17-08-2023		
17-08-2023	Sales		--	8 101026	Kontorcentrallen A/S	--	--	--	-315	8	-822.150,00	17-08-2023		
07-09-2023	Sales		--	10 101029	Virk1	--	--	--	-325	10	-846.250,00	07-09-2023		

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

ItemPlanning - Sales All Search Related Automate

Document Type	No. 1	Item Storage	Sell-to Customer No.	Order Date	Shipment Date	Requested Delivery Date	Salesperson Code	Location Code
Order	101008	IB	20000	30-04-2020	30-04-2020	17-08-2023	AD	
Order	101015	IB	10000	05-04-2023	17-01-2022	17-01-2022	AD	
Order	101017	IB	10000	05-04-2022	17-01-2022	12-09-2023	AD	
Order	101018	IB	20000	05-04-2023	17-01-2022	20-10-2023	AD	
Order	101019	IB	20000	05-04-2023	17-01-2022	21-09-2023	AD	
Order	101020	IB	20000	17-05-2023	17-01-2022	12-09-2023	AD	
Order	101022	IB	40000	17-05-2023	17-01-2022	06-09-2023	AD	
Order	101023	IB	10000	20-04-2023	20-01-2022	06-10-2023	AD	
Order	101024	IB	15004	20-04-2023	06-12-2022	04-08-2023	AF	
Order	101026	IB	10000	30-03-2023	05-12-2022	12-08-2023	AD	
Order	101028	IB	10000	01-04-2023	05-12-2022	03-08-2023	AD	
Order	101027	IB	15001	07-03-2023	07-01-2023	18-05-2023	AD	
Order	101028	IB	40000	14-04-2023	14-04-2023	01-08-2023	MRV	
Order	101029	IB	15001	26-06-2023	14-04-2023	07-09-2023	MSC	

Example 1:

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



ItemPlanning - Sales

ItemPlanning - Sales

General

Document Type: Order Sell-to Customer Name: Ravel Møbler Dates: Requested Delivery Date: 20-10-2023

No.: 101018 Promised Delivery Date: New Sales Order Delivery Date: []

Sell-to Customer No.: 2000 New Sales Order Delivery Date: []

Item	Description	Description 2	Unit	Location Code	Requisition System	Shipment Date	Remaining Quantity	Actual Stock	Required Date Free stock	All Dates Total Stock	Avail Order	Avail Lead
1920-S	ANTWERPEN Konferenbord	ANTWERPEN Konferenbord	[]	[]	Purchase	20-10-2023	4	10	-5	-5		16-08-2023
2000-S	SYDNEY Drejstol, gran	SYDNEY Drejstol, gran	[]	[]	Purchase	20-10-2023	32	38	6	6		

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

ItemPlanning - Sales

ItemPlanning - Sales

Show Sales Order Update Sales Or

Sales Order

101018 · Ravel Møbler

Process Posting Release Prepare Print/Send Request Approval Order Actions Related Automate Fewer options

General

Customer Name: Ravel Møbler Contact: Heleen Ray Requested Delivery Date: 20-10-2023

Sell-to: Posting Date: 05-04-2023 External Document No.: []

Contact Phone No.: VAT Date: 05-04-2023 Status: Open

Contact Fax No.: Order Date: 05-04-2023

Contact E-Mail: heleen.ray@contoso.com Due Date: 05-05-2023

Contact Role: []

Type	No.	Item Reference No.	Description	Description 2	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	UoM
Comment	2		Konferenbordbundt 2-8									
Item	1920-S		ANTWERPEN Konferenbord			4			STK	3.599,00		
Item	2000-S		SYDNEY Drejstol, gran			32			STK	1.056,00		
Resource	LISE		Installation			4			TIME	860,00		

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.

ItemPlanning - Sales

ItemPlanning - Sales

General

Document Type: Order Sell-to Customer Name: Ravel Møbler Dates: Requested Delivery Date: 20-10-2023

No.: 101018 Promised Delivery Date: New Sales Order Delivery Date: []

Sell-to Customer No.: 2000 New Sales Order Delivery Date: []

Item	Description	Description 2	Unit	Location Code	Requisition System	Shipment Date	Remaining Quantity	Actual Stock	Required Date Free stock	All Dates Total Stock	Avail Order	Avail Lead
1920-S	ANTWERPEN Konferenbord	ANTWERPEN Konferenbord	[]	[]	Purchase	20-10-2023	4	10	-6	-6		16-08-2023
2000-S	SYDNEY Drejstol, gran	SYDNEY Drejstol, gran	[]	[]	Purchase	20-10-2023	32	38	6	6		



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

Show Sales Order
 Update Sales Order Dates
 Create Order Proposals
 Requisition Worksheet
 Planned Production Orders
 More options

General

Document Type: Order Sell-to Customer Name: Vink1 Dates: Requested Delivery Date: 04-08-2023

No.: 101024 Promised Delivery Date: New Sales Order Delivery Date:

Sell-to Customer No.: 10004

Lines | Line | Filter options

Item	Description	Description 2	Select	Location Code	Appurement System	Document Date	Remaining Quantity	Actual Stock	Required Date free stock	All Dates Total Stock	Avail Order	Avail Lead
HC200	Hydraulic Cylinder Serie 200	Hydraulic cylinder	<input type="checkbox"/>		ProdOrder	04-08-2023	50	0	-290	-305		
HC200	Hydraulic Cylinder Serie 200	Hydraulic cylinder	<input type="checkbox"/>		ProdOrder	04-08-2023	100	0	-290	-305		
HC200	Hydraulic Cylinder Serie 200	Hydraulic cylinder	<input type="checkbox"/>		ProdOrder	04-08-2023	50	0	-290	-305		
HC200	Hydraulic Cylinder Serie 200	Hydraulic cylinder	<input type="checkbox"/>		ProdOrder	04-08-2023	200	0	-290	-325		

ItemPlanning Sales Order Multi-select

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

CRONUS Danmark A/S | Journals | Worksheets | Orders | Product Design | Capacities | Setup

ItemPlanning - Item ItemPlanning - BOM ItemPlanning - Critical Items ItemPlanning - Sales ItemPlanning -... Multi-select

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

CRONUS Danmark A/S | Journals | Worksheets | Orders | Product Design | Capacities | Setup

ItemPlanning - Sales Order Multi-select

Filter list by: Shipment Date < 01/07

Views	Document Type	Document No.	Item	Line No.	Sell-to Customer No.	Customer Name	No.	Description	Outstanding Quantity	Allocating Code	Location Code	Salesperson Code	Order Date	Planned Shipment Date	Planned Delivery Date	Shipment Date	Res Del Date
Filter	Order	101008	10000	20002	Ravel Møbler	1021	Die Type A, ORDER 101008	2	PRIMER	AD	30-04-2020	11-06-2023	17-06-2023	17-06-2023	17		
Filter	Order	101009	20000	20000	Ravel Møbler	1022	Die Type B, ORDER 101009	2	PRIMER	AD	30-04-2020	11-06-2023	17-06-2023	17-06-2023	17		
Filter	Order	101009	30000	20000	Ravel Møbler	1023	Thru Plate, ORDER 101009	1	PRIMER	AD	30-04-2020	11-06-2023	17-06-2023	17-06-2023	17		
Filter	Order	101009	40000	20000	Ravel Møbler	1024	Counter Die Type B, ORDER 101009	2	PRIMER	AD	30-04-2020	11-06-2023	17-06-2023	17-06-2023	17		
Filter	Order	101009	50000	20000	Ravel Møbler	1025	Counter Die Type B, ORDER 1010...	2	PRIMER	AD	30-04-2020	11-06-2023	17-06-2023	17-06-2023	17		
Filter	Order	101009	60000	20000	Ravel Møbler	1026	Mold, ORDER 101009	1	PRIMER	AD	30-04-2020	11-06-2023	17-06-2023	17-06-2023	17		
Filter	Order	101022	30000	20000	Ravel Møbler	1012	Lamp A	125		AD	17-03-2023	18-05-2023	18-05-2023	18-05-2023	06		
Filter	Order	101027	10000	15001	Vink1	HC200	Hydraulic Cylinder Serie 200	5		AD	07-03-2023	18-05-2023	18-05-2023	18-05-2023	18		

Sales analysis can be executed by pressing Actions -> Other -> Item analysis. Analysis 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





CRONUS Danmark A/S | Journals | Worksheets | Orders | Product Design | Capacities | Setup

ItemPlanning - Sales Order Multi-select: All | Search | New | Actions | Automate | Fewer options

Views: *All

Filter list by: Shipment Date

Document Type	Document No.	Quantity	Stock
Order	101009	20000	
Order	101009	30000	

Line menu: Show only Shortage, Other

Item analysis menu: Sell-to Customer No., Customer Name, Item analysis, Use short menu

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.

Edit - ItemPlanning - Sales Analysis - ItemPlanning - Sales

General

Sales Order Filters: Shipment Date: 01-05-23 | Show only neg. free stock: | Exclude Purchase: | Show Rep System: All | Show Planning Worksheet data: | Exclude Production orders:

Item	Description	Select	Vendor	Location Code	Replenishment System	Shipment Date	Remaining Quantity	Actual Stock	Required Date Free stock	All Date Total Stock	Avail Order	Avail/Used	Stockout Date
1012	Lamp A	<input type="checkbox"/>			ProdOrder	18-05-2023	125	133	8	180	15-07-2023		15-09-2023
1021	Dr Type A, ORDER 101009	<input type="checkbox"/>	PRIMAR		ProdOrder	17-05-2023	2	196	6	196			
1022	Dr Type B, ORDER 101009	<input type="checkbox"/>	PRIMAR		ProdOrder	17-05-2023	2	8	6	6			
1023	THP Plate, ORDER 101009	<input type="checkbox"/>	PRIMAR		ProdOrder	17-05-2023	1	6	5	5			
1024	Counter Die Type ORDER 101009	<input type="checkbox"/>	PRIMAR		ProdOrder	17-05-2023	2	5	4	4			
1025	Counter Die Type B, ORDER 101009	<input type="checkbox"/>	PRIMAR		ProdOrder	17-05-2023	2	5	3	3			
1026	Mold, ORDER 101009	<input type="checkbox"/>	PRIMAR		ProdOrder	17-05-2023	1	2	1	1			
10200	Hydraulic Cylinder Serie 200	<input type="checkbox"/>			ProdOrder	18-05-2023	5	8	308	325			04-08-2023

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

CRONUS Danmark A/S | Journals | Worksheets | Orders | Product Design

ItemPlanning - Sales Order Multi-select: All | Search | New | Actions | Automate

Views: *All

Filter list by:

Document Type	Document No.	Quantity	Stock
Order	101009	20000	
Order	101009	30000	

Line menu: Show only Shortage, Other



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.