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
- 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
- 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





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3,080,00

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

Availab	ble Roles $P \sim$	\mathcal{S} \times
	• Display Name	
	NAVEKSA MakeToOrder	:
\rightarrow	NAVEKSA ItemPlanning Adm	:
	NAVEKSA ItemPlanning User	

• 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.*

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

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

Itemplanning User

CRONUS Danmark A/S | Worksheets | 🗮 ItemPlanning - Item ItemPlanning - BOM ItemPlanning - Critical Items ItemPlanning - Sales ItemPlanning -...es Order Multi ItemPlanning - Prod. Order ItemPlanning -...d. Order Multi

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.1
 Construction
 Submitted Extr
 Autory EXtr
 Foldscher EXtrinit
 Construction
 Construction</

MSC HC20

MSC HC20





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

ItemPlannin	na - Item								0									
tion of Long Sec.	ninter Different states Managem	ant Di la	ninera Dine	. Barrantin	fan in etw		Testation 1	Marg and page										
General	and a second second					~ * 6										Item Details - Replenishment		
																Sec.10.	H1200	
NE	+C200			9	eorphan I		-									Repletionment System	Pod Order	
Description	Wateric Opt	Ser.			the Parring Verschael	tata .	•									mentary	5	
																Purchase		
Lines Line fee	er options														12 63	Vendor No.	2.83	
200	422		happedert	Sile Drive	Longer laster to	111	Synthese Contraction	Peshation	2 danet	1.1.1.1.1.1	Smith	100000	The second second	-	and the second	Vendor Rem No.		
08	inarticy	COM	26440	-		-499	CORVER	cross no.	1.000		- 90	20,880.00	Distances.	Taracture .	1994 (199	Bank March		
- 14.04.2023	Production ·	1				1	-	100326		11	5	15,850,00	14-54-2023			Manufacturing Policy	Male to Order	
14-04-2023	Patried	1				100		100821		113	100	294,850,00	14-04-2023			As any No.	HC200	
14-04-2025	Ponecett					200		1005528		113	200	816,930,00	14-04-2023			Production BOM No.	PIC200	
18-05-2023	Predation		5	101027	weet					308	1	803.880.00	18-05-2023			The same descent of the second second		
01-08-2023	Rychael Comp. (host-stari)	1	200	101028	Liteare, Inc.					108	200	281.380.00	11-05-2023			Item Details - Hanning		
04-08-2023	Fee Parried		90	101024	Vite4					98	60	18:380,00	04-08-2025			Terri Nat.	H0200	1
04 08 2023	Comp. (firm Parmed) Transfer		100	101024	Vited.					-42	100	-105.622.00	04-00-2025			Rendering Relia	Lot-for-Lot	
04.08.2023	Service	-	30	nendif4	vind.						200	-945122,00	04.05.3323			Time Suchat.		
17-06-2023	Avidant Bariat		10	121028	Kontorcentraien A.S.					-80	10	788,222.00	17.08.3025			Safety Send Time		
17-06-2023	Internet		3	101028	Rontonentmen A/S					-302		401,270.00	17-00-2023			Safety Book Quartity	4	
17-06-2023	Rever Adapt			101028	Kontoncentralien A/S					-115	8	-822.155.00	17-06-0023			Reorder Point		
07-09-2028	Augentis Course		10	101028	Viet					-125	10	-848,250,00	07.09-2025			Reolder Quartity	a .	
	100															Macinum inventory		
																Monte Control Controls		
																Code 11 mars		
																Last Time Citil Littler	5.811	
																Test rue chimeron		

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 imme diately 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

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.

	Description	Substitutes Exist	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Cost is Adjusted	Unit Cost	Unit Frice Vendor No.	Search Description			
22	Hydraulic cylinder	No	No	HS200	15200	BSS		2.610,00	0,00	HYDRAUUC CYL	🛈 Details 👔	Attachments (0)	
40200	Hydraulisk cylinder	No	No	MSC_HC200	MSC_HC200	PCS	10	3.080,00	0,00	HYDRAULISK CY			
											Item Details - Inv	olding	
											item No.		
											Costing Method		51
											Cost is Adjusted		
											Cost is Posted to Gil		
											Standard Cost		2
											Unit Cost		13
											Overhead Rate		
											Indirect Cost %		
											Last Direct Cost		
											Profit %		
											Unit Price		
											Item Details - Pla	nning	
											item No.		
											Reordering Policy		Lot
											Reorder Point		
											Reorder Quantity		
											Maximum Inventory		
											Overflow Level		
											Time Bucket		
											Lot Accumulation Pe	riod	
											Rescheduling Period		
											Safety Lead Time		
											Safety Stock Quantil	Y	
											Minimum Order Qui	antity	
											Maximum Order Qu	antity	
											Order Multiple		
											Dampener Period		
											Dampener Quantity		

AC300 AC400 (purchased item)





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

Explode · · · ·			Single	e level	BOM					\sim							
Explode · · · ·			Multi-	level	BOM +	Mai	in rou	uting		\sim							
itemPlanning - BOM									(2)) <u>i</u> ë	+ 🗊						
ItemPlanning -	- BOM								0								
📆 Update ItemPlanning	🗟 Create Order Proposals 🕻 Appl	/ Template	Requisit	tion Worksh	neet 📔 Plan	ned Pror	duction O	rders 📔 Assen	ibly Orders 🚺	Item Journal	💽 Item Reciassi	fication Journal	尾 Item Tracir	ng 🛛 🖻 Stati	istics Mor	re options	
General																	Show less
No	нс200			Calculat	e for qty.					0	Explode			vluiti-level Br	DM + All routin	ngs	~
Description	Hydraulic cylinder			Qty. in F	Prod.order					305	Show co	mponent lines sh	hort on r				
Active Version				Qty. to I	ould					0	Show co	imponent lines sh	nort only	-			
Required Quantity				Select fr	or Create Orde	r (Propo	ean				Show Re	ol Sustem	5	6/1			
nequired quantity			-	June 1	n create orde	i (i topo	~ ~	-			JIN THE	pisystem					-
Required Date	17-08-2023		8	Select a	.) Lines for Cre	ste Orde	s(•			Show Pla	unning Workshee	t data	<u> </u>			
Starting Date Capacity calc.			1	Availab)	e Date (mat.)						Exclude i	Purchase	0				
Inventory on Location			8	Critical I	tem						Exclude	Production order	s				
				Availabi	e Date (cap.)												
lines Line Fewer opt	ions															1	14 51
														Qty in			
Component / Operation	Description	Select	Vendor / Center	Level	Replenish System	Expl SOM	Expl Route	Actual Stock	BOM / Route Qty	BOM Demand	Required Date Free stock	All Dates Total Stock	AvailLead	Purchase Order	AvailOrder	Starting Date	Ending
010	Final assempty		100	0	Route		0	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	2		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		0	1	0	0	0		-		17-08-2023	17-08-
AC300	Piston for series 200			1	Prod.Order	5		8	1	0	8	8		-		17-08-2023	17-08-
010	Dreje komplet		400	1	Route	0		0	1	0	0	0				17-08-2023	17-08-
020	Færdiggøre		300	1	Route	0		0	1	0	0	0		-		17-08-2023	17-08-
	Rath fact and an 200	10		2	Purchase	10		0	5	0	-1.525	-1.525	17-08-2023			17 08 2022	17-08-
BC300	bolt for series and	- U.												-		11-00-6060	

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		- / 6	+ 8
ItemPlanning - BOM			
🗒 Update ItemPlanning 🔒 Create Order Proposals 😭 Apply Templ	ate 📱 Requisition Worksheet 📲 Planned Produc	tion Orders 🖹 Assembly Orders 🚺 Item Journal 🚦	item Reclassification Journal 🖪 Item Tracing 🕗 Statistics 🛛 More options
General		antractioned toget our event wavely the postal decision of	Show h
No. HC200	Calculate for gty.		Explode Single level BOM
Description Hydraulic cylinder	Qty. In Prod.order	305	Show component lines short on r
Description Hydraulic cylinder Active Version	Qty. in Produceder	305 	Show component lines short on r
Description Hydraulic cylinder Active Version Required Quantity	Qty. In Producter Qty. to build 1 Select for Create Order (Proposal)	305 0 	Show component lines short on r Show component lines short only Show Repl System
Description Hydraulic cylinder Active Version Required Quantity Required Date 17-08-2023	Qty. in Prod.order Qty: to build 1 Select for Create Order (Proposal) E Select all Lines for Create Order (305 0 . •	Show component lines shart on r Show component lines shart on r Show Repußsten All Show Panning Worksheet data
Description Hydraulic olinder Active Version Resulted Quantity Resulted Quantity Resulted Costet 17-08-2023 Stating Date Capacity calc.	City, in Produrder City, in Produrder City, to build Select for Create Order (Proposal) Select all Lines for Create Order (, Available Date (mat,)	305 0 0 0 0	Show component lines short on r Show component lines short on ry Show Republications and a short on ry Show Reprintly Worksheet data Discub Revises
Decription Hydraulic gillider Active Version Required Quartity [748-2023 Required Quartity [748-2023 Starting Date Cateschy calc. []	City, in Produorder City, to build I Select for Create Order (Proposa) Select all Units for Create Order (, Autiliate Date (mat) Critical item	305 0 0 0 0 0 0 0 0 0 0 0 0 0	Show component lines short on r Show component lines short on r Show Regr.System Al Show Rearring Worksheet data Exclude Participate Exclude

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

Show Repl.System

Lines Line Fewer op	otions															1	6
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	AvailLead	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-
→ <u>AC400</u>	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)

	NA	VEKS
emPlanning - BOM		0 B +
temPlanning - BOM		
🔣 Update ItemPlanning 🛛 🕏 Create Order Proposals 🖓 Apply Templ	ate 🔠 Requisition Worksheet 📑 Planned Production Orders 📓 Assem	nbly Orders 💽 Item Journal 🔳 iter
ieneral		
o. HC200	Calculate for qty.	o
escription Hydraulic cylinder	Qty. in Prod.order	305
ctive Version	Qty, to build	0
equired Quantity	1 Select for Create Order (Proposal) · · · ·	
lequired Date 17-08-2023	Select all Lines for Create Order (
tarting Date Capacity calc.	Available Date (mat.)	
	8 Critical Item	
nventory on Location	Available Date (cap.)	
inventory on Location	The second	
inventory on Location		

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)

bit drive tables from	e critical Items		$\sim \times$
bytons box Parning Workheet data tr.04, 2023 tr.04, 2023 tr.04, 2023 tr.04, 2023 tr.04, 2023 tr.04, 2024 tr.04, 2024	values from	st used options and filters	
hos Parning Workheld data Tr.26-2033 Savante dr fers selectori in tegetori interto Patring Grupo Savante de fine Re fining Grupo Savante de fine Re fining Grupo Savante de fining Grupo			
Acutor of Market Statements (17.49-283) Analytic for the selection Iter: Teen	ing Worksheet data 💿 🌘	\supset	
	ntil	7-08-2023	0
18er: Image: State S	or item selection	eg. stock	
innertog Vozing Group			
ree			
Clen Prod Pathy Group Clen Prod Pathy Group Repetrishmen System	Destine Centre		
Gen Post Posting Group Poplerishment System	Posong Group		
Repletishment System	1. Posting Group		
+ Fitter	nment System		
ilter totals by:	ls by:		
+ Filter			
Schedule OK Cance		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





ItemPlanning Critical Items									
, [©] Search Manage									
No. 7 🗸	Description	Base Unit of Measure	Unit Cost	Unit Price	Vandor No.	Starting Inventory	Calculated Inventory - End Date	Calculated Inventory - Lowest	Calculated Inventory - Highest
1100	Fabicated 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 8AR 3/16"X 4"X 4" RAW	PCS	20,00	0,00		0	-30	-30	0
200060RAW	RR8-6 BAR 3/16X4X 6 1/2" RAW	PCS	30,00	0,00		0	-5	-5	0
4172	Side pannel for allignment 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 allignment 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
AG400	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	2 ×
Use default values from	Last used options and filters \checkmark
Options	
Show Planning Worksheet data · · · · (
Calculate until	18-08-2023
Parameter for item selection	Neg. stock 🗸
×No	HC200 ~
× No	HC200 V
×Inventory Posting Group	~
×Gen. Prod. Posting Group	~
× Replenishment System	~
+ Filter	
Filter totals by:	
+ Filter	
nly shortage for i	item no HC200 is displaye
iny shortage for i	Schedule OK Cancel
Λ	



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)

temPlannir	ng	- Item														
New 📑 Apply Ten	plate	e 🖹 Requisition Wo	rksheet 🚺 item	a Journal 🚺 Item	Reclassificat	ion Journal 🛛 👩 Item Tra	cing 🔁 S	tatistics	$\text{Actions} \sim - \text{R}$	elated \lor Aut	omate ~ Fewer	r options				
Seneral																
a		HC200			De	scription 2										
escription		Hydraulic c	ylinder		Shi	ow Planning Worksheet d	ata (
nes Line Fev	ver og	otions														13
Date		Туре	Location Code	Independent/ Demand	Sales Order No.	Customer/Vendor/Tob Name	Supply	Purchase Order No.	Production Order No.	Planned Order	Inv.pxcl.FC	Simulate Qty.	Stock Value	Simulate Date	item Relation	Variant Code
>		Inventory			-			-	-		8		20.880,00			
14-04-2023		Production			-		5	-	100326		13	5	33.930,00	14-04-2023		
14-04-2023		Production			a 1		100	-	100327		113	100	294.930,00	14-04-2023		
14-04-2023		Production			-		200	-	100328		313	200	816.930,00	14-04-2023		
18-05-2023		Sales		5	101027	Virk1		20	12		308	5	803.880,00	18-05-2023		
01-08-2023		Sales		200	101028	Litware, Inc.			-		108	200	281.880,00	01-08-2023		
04-08-2023		Sales		50	101024	Virk4			-		58	50	151.380,00	04-08-2023		
04-08-2023		Sales		100	101024	Virk4			14		-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	Kontorcentralen A/S			-		-302	10	-788.220,00	17-08-2023		
17-08-2023		Sales		5	101026	Kontorcentralen A/S		-	-		-307	5	-801.270,00	17-08-2023		
17-08-2023		Sales		8	101026	Kontorcentralen A/S		-	-		-315	8	-822.150,00	17-08-2023		
07-09-2023		Sales		10	101029	Virk1		121	1.5		-325	10	-848.250,00	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 ~ , P Se	arch Related ~ Automat	te \vee						ଓ ♡ ≡ /
Document Type 1 ¥	No.1	Item Shortage	Sell-to Customer No.	Order Date	Shipment Date	Requested Delivery Date	Salesperson Code	Location Code
Order	101009		2000	30-04-2020	30-04-2020	17-06-2023	AR	
Order	101015		10000	05-04-2023	17-01-2022	17-01-2022	AD	
Order	101017		10000	05-04-2022	17-01-2022	12-09-2023	AD	
Order	101018	8	20000	05-04-2023	17-01-2022	20-10-2023	AD	
Order	101019		20000	05-04-2023	17-01-2022	21-09-2023	AD	
Order	101020	0	20000	17-03-2023	17-01-2022	12-09-2023	AD	
Order	101022		20000	17-03-2023	17-01-2022	06-09-2023	AD	
Order	101023		10000	20-03-2023	20-01-2022	06-10-2023	AD	
Order	101024	0	15004	20-03-2023	05-12-2022	04-08-2023	JM.	
Order	101025	8	10000	30-03-2023	05-12-2022	13-09-2023	AD	
Order	101026	11	10000	02-04-2023	05-12-2022	02-08-2023	AD	
Order	101027		15001	07-03-2023	07-03-2023	18-05-2023	AD	
Evample 1.	101028		40000	14.04.2023	14.04.2023	01.08.2023	MRC	
Lyampic T.	101029	10	15001	26-06-2023	14-04-2023	07-09-2023	MSC	

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



ItemPlanning - Sales				0) 🖻 +	8						√ Saved	C /
ItemPlanning -	- Sales												
Show Sales Order	Update Sales Order Dates 🔹 Create Order Propo	als Requisition Worksheet R Planned	Production Orders	Automate ~ _ F	ever options								
General													
Document Type	Order	Sel-	to Customer Name		Ravel Møbler			Dates					
No.	101018							Requested Delivery Da	te	23-10-2023			
Sel-to Customer No.	20000							Promised Delivery Dat					
								New Sales Order Delv	ery Date				m
Lines Line Reveropt	lans												20
here	Description	Description 2	Select	Location Code	Replanishment System	Digment Data	Remaining Quantity	Artual Stack	Required Date Free stock	All Dates Total Stock	ArailOrder	Autor	
1920-5	ANTWERPEN Konferencebord	ANTWERPEN Konferencebord			Punchase	20-10-2023	4	10	-5	-5		18-08-2023	3
→ 2000-5	SYDNEY Drejestol, gran	SYDNEY Drejestol, gran			Punchase	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.

ItemPlannin	ig - Sales	5												
ItemP	lann	ing	- Sales											
Show S	Sales Orc	ler 📧	Update Sales C	Dr										
Sales Order 101018 · Rave Process Posting Rele	I Møbler	Print/Send Reg	uest Approval Order Acti	ians∨ Related ∨	Automate 🗸 🛛 F	ewer options	0	ළ -	+ 0					
General													She	ow more
Customer Name	Rave	e Møbler	1000	Contact		Helen Ray			Requested D	elivery Date	20-10-20	023		
Sell-to				Posting Date		05-04-2023			External Doc	ument No.				
Contact Phone No.				VAT Date		05-04-2023			Status		Open			
Contact Fax No.				Order Date		05-04-2023								
Contact E-Mail	hele	n.ray@contoso.co	me	Due Date		05-05-2023								
Contact Role			~											
Lines Manage Line	Order Fewe	r options											ß	
Туре	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 %	Ur
→ Comment	1		Konferencebundt 2-8							-				
Item	1920-S		ANTWERPEN Konferencebord	1				4		-	STK	3.599,00		
Detroiyne	2000-S		Installation					32			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			C) @ +	8						√Saved ⊟ 💉
Show Sales Order	ipciate Sales Order Dates 🛛 🗟 Create Order Propo	sais 👔 Requisition Worksheet 👔 Pla	erned Production Orders	Automate ~ F	ewer options							
General												
Document Type	Order		Sel-to Customer Name		Ravel Møbler			Dates				
No	101018							Requested Delivery Da	ste	20-10-2023		
Sell-to Customer No.								Promised Delivery Dat				
								New Sales Order Delv	ery Date			8
Lines Line Feneropti	25											68
ten	Desorgation	Description 2	Select	Location Code	Repletichment System	Shipment Date	Remaining Quantity	Actual Stock	Required Date Free mock	All Dates Total Stock	Avail.Order	AvailLead
1920-5	ANTWERPEN Konferencebord	ANTWERPEN Konferencebord			Purchase	20-10-2023	- 4	10	-5	-5		18-08-2023
→ <u>2222-5</u>	SYDNEY Drejestol, gram	SYDNEY Drejestol, gram			Purchase	20-10-2023	32	38	6	6		



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												
E Show Sales Order 🛛 E U	pdate Sales Order Dates 🛛 🛞 Create C	Vider Propositis	Requisition Worksheet	Planned Production Orders	More options								
General													
Document Type	Order			Sell-to Customer Name		Virkel			Dates				
No.	101024								Requested Delivery Da	te	04-05-2023		
Sell-to Customer No.	15004								Promised Delivery Dat	e			
									New Sales Order Deliv	ery Date			E
Lines Une fewer-optic	ns												er 12
Item	Ossoription		Description 2	Select	Location Code	Replenishment System	Shipmare Data	Remaining Quantity	Actual Stock	Required Date Free stock	All Dates Total Stock	ArailOrder	Availand
HC200	Hydraulic Cylinder Serie 200	Fiter.	Hydraulic cylinder			Prod.Order	04-08-2023	50	8	-292	-325		
HC200	Hydraulic Cylinder Serie 200		Hydraulic cylinder			Prod.Order	04-08-2023	100	8	-292	-325		
HC200	Hydraulic Cylinder Serie 200	A Clear sider	Hydraulic cylinder			Prod.Order	04-08-2023	50	8	-292	-325		
→ <u>MC200</u>	Hydraulic Cylinder Serie 200	What's this?	Hydraulic cylinder			Prod.Order	04-08-2023	200	5	-292	-325		

ItemPlanning Sales Order Multi-select

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

CRONUS Danma	rk A/S Journals	✓ Worksheets ✓	Orders ~	Product Design 🗸	$Capacities \lor$	Setup 🗸 🚽
ItemPlanning - Item	ItemPlanning - BOM	ItemPlanning - Crit	tical 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	lournals - Wo	rksheets - On	ders ~ Pr	roduct Design	n∨ Capacit	ies -> Setup ->	=										_
ItemPlanning - Sales Order	Multi-select:	All~ ,P Se	arch New /	More option	5											12	T = 2	
Views	×	Document Type 1	Document No.	Item Shortage	Line No. 1	Sell-to Customer No.	Customer Name	No.	Description	Outstanding Quantity	Afdeling Kode	Location Code	Salesperson Code	Order Date	Planned Shipmant Date	Planned Delivery Date	Shipment Date 🖤	Rec Del Dat
2411	10 :	Order	101009		10000	20000	Ravel Møbler	.1921	Ris Dire A. ORDIR 101009	2		PRIMAR	AD	30-04-2020	17-06-2023	17-06-2023	17-06-2023	17
Filter list by:		Order	101009		20000	20000	Ravel Møbler	1022	Die Type 8, ORDER 101009	2		PRIMAER	AD	30-04-2020	17-06-2023	17-06-2023	17-06-2023	17-
× Shipment Date	_	Order	101009		30000	20000	Ravel Møbler	1023	THP Plate, ORDER 101009	1		PRIMAER	AD	30-04-2020	17-06-2023	17-06-2023	17-06-2023	17
.0107		Order	101009		40000	20000	Ravel Møbler	1024	Counter Die Type ,ORDER 101009	2		PRIMAER	AD	30-04-2020	17-06-2023	17-06-2023	17-06-2023	17
+ Fiter_		Order	101009		50000	20000	Ravel Møbler	1025	Counter Die Type B, ORDER 1010	2		PRIMAER	AD	30-04-2020	17-06-2023	17-06-2023	17-05-2023	17
Reset filters		Order	101009		60000	20000	Ravel Møbler	1026	Mold, ORDER 101009	1		PRIMÆR	AD	30-04-2020	17-06-2023	17-06-2023	17-06-2023	17.
		Order	101022		30000	20000	Ravel Møbler	1012	Lamp A	125			AD	17-03-2023	18-05-2023	18-05-2023	18-05-2023	05
		Order	101027		10000	15001	Virici	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 Dann	nark A/S	urnals	heets∨ Or	rders v Pro	oduct Design	√ Capacities √ Setup
ItemPlanning - Sales	Order Multi-select:	All 🗸 🗍 🔎 Search	n New ∽	Actions \lor	Automate 💛	Fewer options
Views	× R. :	Document Type 1	Document No. †	Eine Show only	> y Shortage	Sell-to Customer No. Customer Name
	··/ .	Order :	101009	Other	>	💐 Item analysis 🛛 er
Filter list by:		Order	101009	- UP	20000	√ Use short menu
× Shipment Date		Order	101009		30000	

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.

concerner and many	- Sales Analysis - ItemPlanning - Sales												× ×
Create Order Proposain	🖹 Requisition Worksheet 📲 Planned Production C	irders Page											
General													
Sales Order fiters	Shipment Date01-07-23			Show only neg. free Str		•			Exclude Purchase				
Show Repl.System	Al			Show Planning Worksh	veet clata	•			biclude Production orders		•		
Lines Marage													18 E
					Participation of								
item.	Description	Select	Vendor	Location Code	System	Shipment Date	Remaining Quantity	Actual Stock	Required Date Free stock	All Dates Total Stock	Avail.Order	Arall.Lead	Stockout Oate
1012	Description Lamp A	Select	Vendor	Location Code	System Prod.Order	Shipment Date 18-05-2023	Remaining Quantity	Actual Stock	Required Date Free stock	All Datter Total Stock	Avail.Order 15-07-2023	AraliLead	Stockout Date 13-09-2023
1012 1021	Leonption Lamp A Die Type A, ORDER 101009	Select	Vendor	Location Code PRIMAER	System Prod.Order Prod.Order	Shipment Date 18-05-2023 17-06-2023	Remaining Quantity 125 2	Actual Stock 133 196	Required Date Free stock 8 196	All Dates Total Stock -182 196	Aal.Orde 15-07-2023	Acalitiesd	Stockout Date 13-09-2023
1012 1021 1022	Description Lamp A Die Type A, ORDER 101009 Die Type B, ORDER 101009	Select	Vendor	PRIMER PRIMER	System Prod.Order Prod.Order Prod.Order	Shipment Date 18-05-2023 17-06-2023 17-06-2023	Remaining Quently 125 2 2 2	Amail Stock 133 196 8	Required Date Free stock 8 196 6	Al Dattes Total Stock -182 196 6	Aull.Order 15-07-2023	Analitiesd	Stockout Date 13-09-2023
1012 1021 1022 1023	Description Larno A Die Type A, ORDER 101009 Die Type B, ORDER 101009 THP Pase, ORDER 101009	Select	Vendor	PRIMER PRIMER PRIMER PRIMER	System Prod.Order Prod.Order Prod.Order Prod.Order Prod.Order	Shipment Data 18-05-2023 17-06-2023 17-06-2023 17-06-2023	Remaining Quantity 125 2 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Artual Stock 133 196 8 6	Required Date Free stock 8 196 6 5	All Dates Total Stock -182 196 6 5	Auli.Order 15-07-2023	Anilland	Stockout Date 13-09-2023
1012 1021 1022 1023 1024	Description Lamp A Die Type A, ORDER 101009 Die Type B, ORDER 101009 THP Pate, ORDER 101009 Counter Die Type, ORDER 101009	Select	Vendor	PRIMER PRIMER PRIMER PRIMER PRIMER	System Prod.Order Prod.Order Prod.Order Prod.Order Prod.Order	Shipmert Date 18-05-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023	Remaining Quantity 125 2 2 1 1 2	Amual Stock 133 198 8 6 5	Required Date Free stack 8 196 6 5 4	Al Dates Total Stock -782 196 6 5 4	Augl.Order 15-07-2028	Acalited	Stocktout Dany 13-09-2023
19491 1012 1021 1022 1023 1024 1025	Description Lamp A Die Tope A, ORDER 101009 Die Type B, ORDER 101009 THP Pate, DODER 101009 Counter Die Type B, ORDER 101009 Counter Die Type B, ORDER 101009	5465	Vendor	PRIMER PRIMER PRIMER PRIMER PRIMER PRIMER	System Prod.Drder Prod.Drder Prod.Drder Prod.Drder Prod.Drder Prod.Drder	Shpreet Cate 18-05-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023	Remaining Quartity 125 2 2 1 1 1 1 2 2 2 2 2 2 2 2 2 2 2 2	Anual Stock 133 198 8 6 5 5 5	Required Date Free stock 8 196 6 5 4 3	At Dates Total Stock -782 196 6 5 4 3	Avall.Order 15-07-2028	Analized	Stocktout Dany 13-09-2023
10012 1021 1022 1023 1024 1025 1026	Learge A Large A Large A De Sport A, CROER 101009 De Sport B, CROER 101009 The Plant, CROER 101009 Counter De Type A, CROER 101009 Counter De Type A, CROER 101009 Mole, CROER 101009	544ct	Vendor	PRIMAR PRIMAR PRIMAR PRIMAR PRIMAR PRIMAR PRIMAR	System Prod.Drder Prod.Drder Prod.Drder Prod.Drder Prod.Drder Prod.Drder Prod.Drder Prod.Drder	Shpreer Date 18-05-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023 17-06-2023	Remaining Quentity 125 2 2 1 1 1 2 1 1 2 1 1 1 1 1 1 1 1 1	Amail Stock 133 198 8 6 5 5 2	Required Date free took 8 196 6 5 4 3 1	All Danier Tonal Stock -1822 1966 5 4 3 3 1	AuliOrder 15-07-2028	AralLasd	Stocknut Bane 13-09-2923

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

CRONUS Dar	mark A/S	Journals ~	Worksł	neets∨ Or	rders∨ P	roduct Design	2
ItemPlanning - Sale	es Order Multi-select:	All 🗠 🗌	, Search	New 🗸 📔	${\rm Actions} \lor$	Automate \lor	
Views	×	Docur Type 1	nent	Document No.	Eline Show on	> ily Shortage	
<u>'Au</u>	57 :	Orde	r ;	101009	Other	>	
Filter list by:	Orde		101009	- /101	20000	ł	





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.

 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.