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# Purchase Planning for Microsoft Dynamics 365 Business Central

## Understanding Purchase Planning

Purchase Planning helps to identify the demand and supply based on the system's data and generates the purchase orders based on required material. It also provides the 'Filters' to get the particular set of material list and generates order for them.

## Why Purchase Planning Tool?

Industry need a handy tool that can calculate **Demand** and **Supply** from system and give the brief knowledge about items that needs to be purchased, also one can easily make purchase orders for the shortage material.

The use of Purchase Planning tool will benefit many of the organization to keep track of their supply chain cycle, from managing orders and overseeing inventory, to getting products where they need to go all in one single window, it is an item-based planning tool.

Purchase Planning helps to bifurcate the difference between the demand and supply order generated via system.

Purchase Planning is designed to accommodate the need of the procurement planner by optimizing the inventory and manage the item from procurement to return stage.

## Features and Capabilities

- Easily manage the demand of the item based on
  - **Quantity on Sales Order**
  - **Quantity on Component Lines**
  - **Quantity on Assembly Component**
  - **Transfer Order Shipment**
  - **Quantity on Purchase Return**
  - **Quantity on Service Order**
  - **Quantity on Job Order**
- Easily manage the supply of the item based on
  - **Inventory**
  - **Quantity on Purchase Order**
  - **Transfer Order Receipt**
  - **Quantity on Sales Return**
- Create purchase order for the shortage items.
- Calculate the Surplus Quantity and Net Shortage Quantity of the items.
- Item based planning is done.
- It is a single window app, which minimizes the job of the planner.

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## Benefits of Purchase Planning

Purchase Planning tool not only optimizes your supply chain management but also provides you with accurate, up-to-date overview of the demand and the supply of the items. With less time consumption it provides all details in just one click.



- Procurement planners can accurately assess the stock levels.
- Perform informed decisions about ordering and scheduling.
- Identify the stock levels of the item and plan the next purchase accordingly.
- Provides complete real-time visibility over the warehouse operations.
- Reduces cost of support and increase profits.
- Less time consumption to load the order details.

Dynamics 365 Business Central

Purchase Planning Worksheet

Select Items Calculate Plan Create Purchase Orders Clear Calculated Data Clear Selected Lines More options

ITEM NO.	ITEM DESCRIPTION	BASE UNIT OF MEASURE	ITEM CATEGORY CODE	QTY ON HAND	QTY ON ORDER	QTY ON TRANSFER	QTY ON PURCHASE	QTY ON RETURN	QTY ON TOTAL
1996 S	ATHLETIC DRESS	PCS	TABLE	30000	780.70				
1990 S	PARTS GUEST	PCS	CHAIR	20000	190.20				
1990 S	PARALLEL MOUNT	PCS	SMALL	20000	390.30				
1990 S	LONDON SW	PCS	CHAIR	20000	148.10				
1990 S	AKTUEP C...	PCS	TABLE	20000	688.40				
1990 S	AKTUEP C...	PCS	MISC	10000	40.80				
1996 S	SPRING GUE...	PCS	CHAIR	20000	150.30		12		
1990 S	ROOMS GUEST	PCS	CHAIR	20000	190.30				
1994 S	TOKYO GUEST	PCS	CHAIR	20000	190.30				
1994 S	MARITIME	PCS	TABLE	10000	148.10				

CREATE PURCHASE ORDER

Dynamics 365 Business Central

Purchase Planning Worksheet

Select Items Calculate Plan Create Purchase Orders Clear Calculated Data Clear Selected Lines More options

Filters

Lines

ITEM NO.	ITEM DESCRIPTION	BASE UNIT OF MEASURE	ITEM CATEGORY CODE	QTY ON SALES ORDER	QTY ON COMPONENT ORDER	QTY ON ASSEMBLY ORDER	QTY ON TRANSFER ORDER (SHIPMENT)	QTY ON PURCHASE ORDER	QTY ON SERVICE ORDER	QTY ON JOB ORDER	TOTAL REQUIRED
1996 S	SPRING GUE...	PCS	CHAIR	12							12

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Select Items Calculate Plan Create Purchase Orders Clear Calculated Data Clear Selected Lines More options

Filters

Department Code

Customer Group Code

Item Category Filter

Item Filter

Planning at Date

Location Code Filter

Calculate for Blank Location

Show Only Storage

Include Drop Ship Quantity

Lines

ITEM NO.	ITEM DESCRIPTION	BASE UNIT OF MEASURE	ITEM CATEGORY CODE	QTY ON SALES ORDER	QTY ON COMPONENT ORDER	QTY ON ASSEMBLY ORDER	QTY ON TRANSFER ORDER (SHIPMENT)	QTY ON PURCHASE ORDER	QTY ON RETURN
1990 S	AMSTERDAM Lamp	PCS	MISC	7			10		6
1990 S	MEXICO Small Chair Black	PCS	CHAIR	10			30		9

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