

# Microsoft Dynamics NAV 2013 Supply Planning & Inventory Visualization\*

Brought to you by Microsoft Services

Savandeep Singh Chadha  
sachadha@Microsoft.com



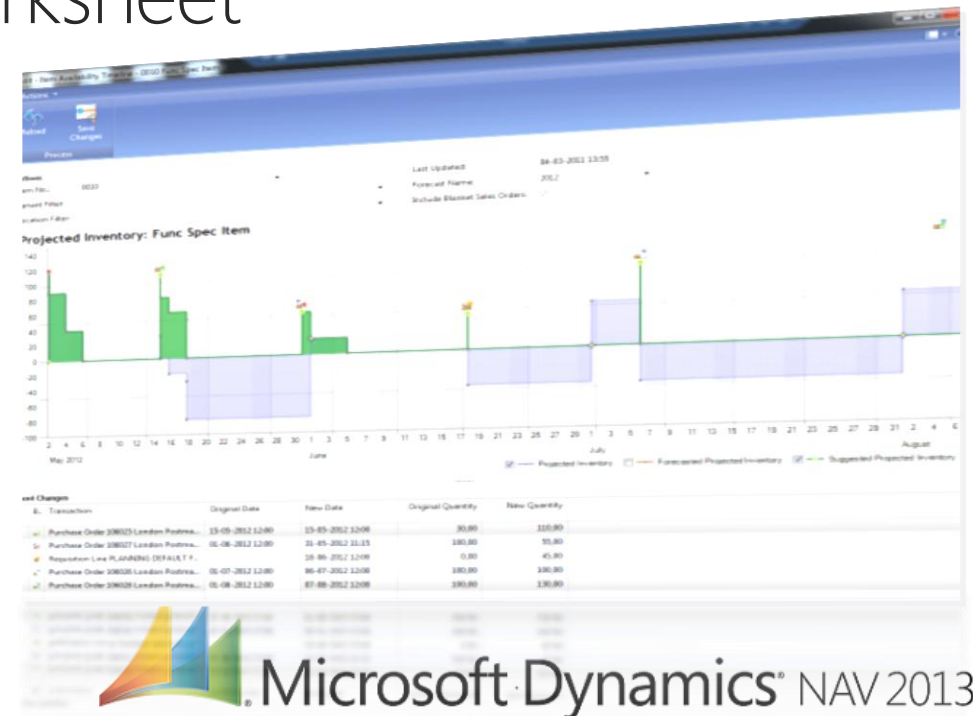
Kabir Shenvi  
kashenvi@microsoft.com

**Microsoft®**  
Partner Network

\* Level Beginner to Intermediate

# AGENDA

- The Planning enhancements
  - Additional Planning Setup Options
  - New layout on Item/SKU card
  - Changes to the Planning and Req. Worksheet
  - Integration to Jobs and Assembly
- Inventory Visualizations
  - by Event (data for the Timeline)
  - by Timeline



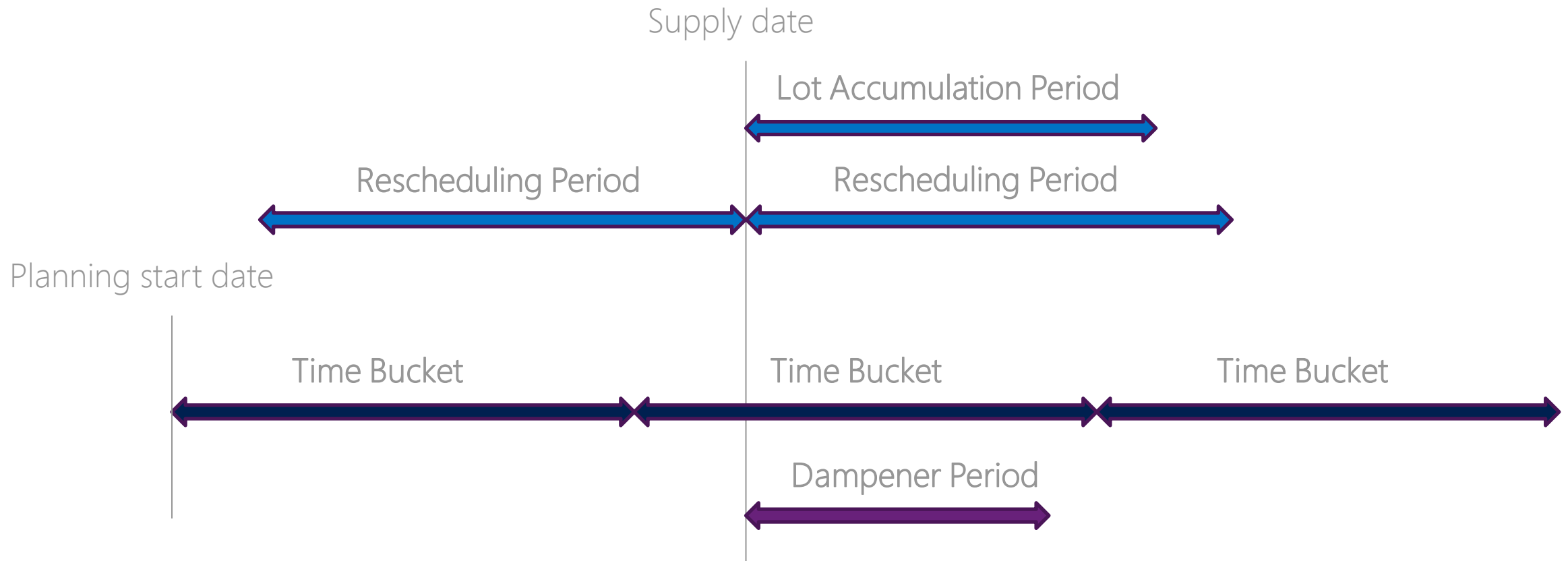
- The Planning enhancements
  - Additional Planning Setup Options
  - New layout on Item/SKU card
  - Changes to the Planning and Req. Worksheet
  - Integration to Jobs and Assembly
- Inventory Visualizations
  - by Event (data for the Timeline)
  - by Timeline

# Additional Planning Setup Options

**Reorder Cycle** has been split into multiple fields making it possible to have different values for:

1. **Lot Accumulation Period:** Demands that are due within the reorder cycle are grouped together to make a joint supply order, used by L-F-L.
2. **Rescheduling Period:** Used to determine if the action message should reschedule an existing order or cancel it and create a new order, used by L-F-L.
3. **Dampener Period:** Currently, the dampener period applies to an item and can never be higher than the value in the item's Reorder Cycle field
4. **Time Bucket:** Period used by the reorder point.

# Additional Planning Setup Options



# Additional Planning Setup

Manufacturing Setup

General

Numbering

Planning

Current Production Forecast: 2013

Use Forecast on Locations: ☐

Default Safety Lead Time: 1D

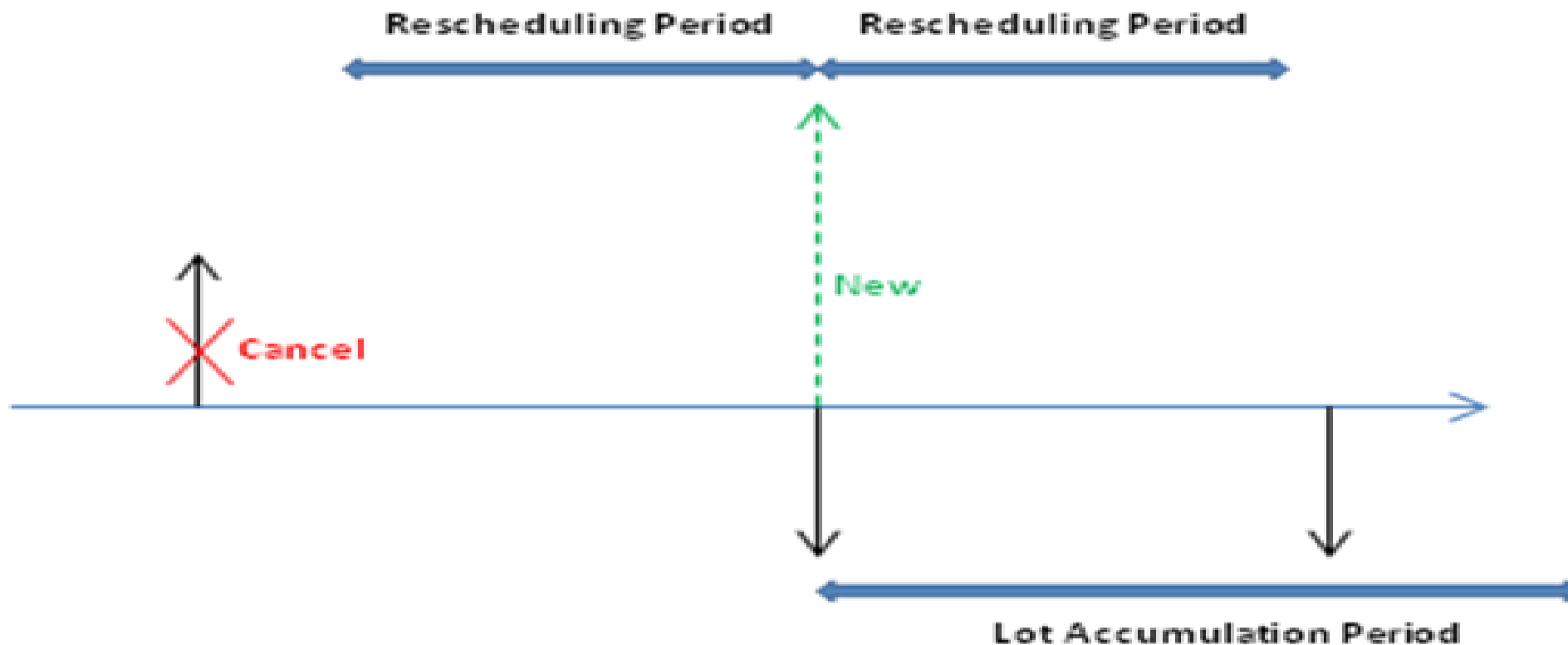
Blank Overflow Level: Allow Default Calculation

Allow Default Calculation

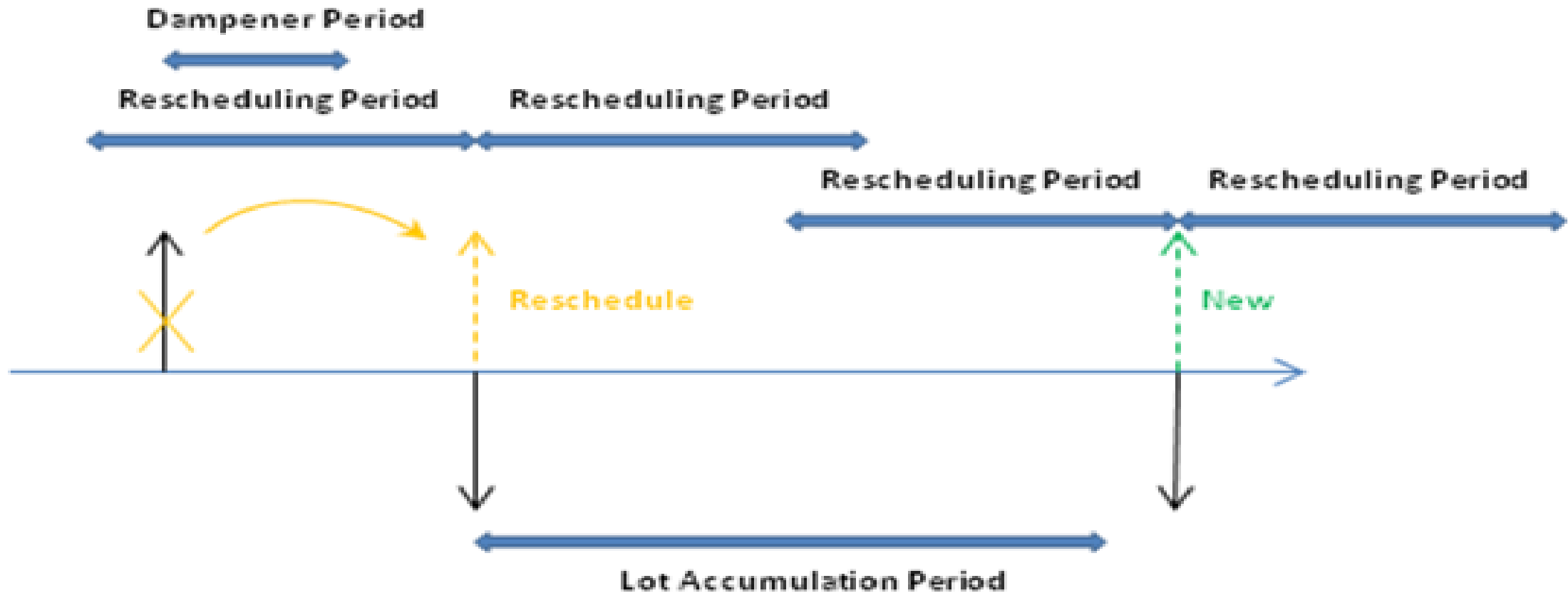
Use Item/SKU Values Only

In the global setup, you can choose to either use the default calculation for items without values in the Overflow Level field of the item/SKU card, or to only use the manually entered values (meaning that 0 or blank on item/SKU card = don't use overflow level)

# Example 1:

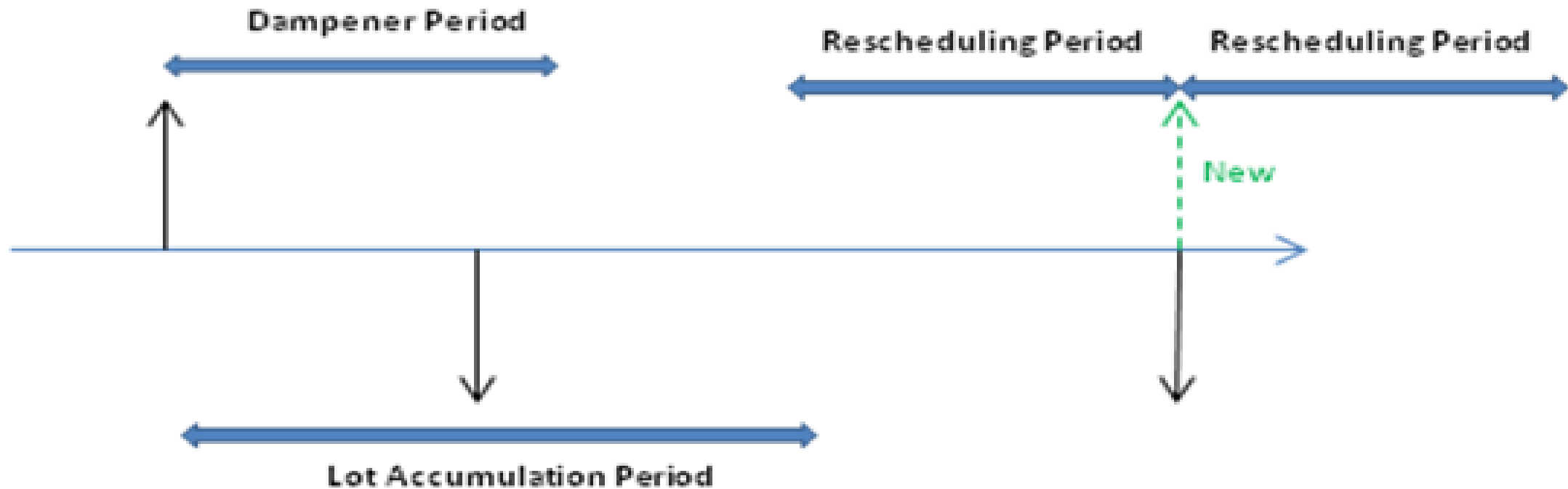


# Example 2:

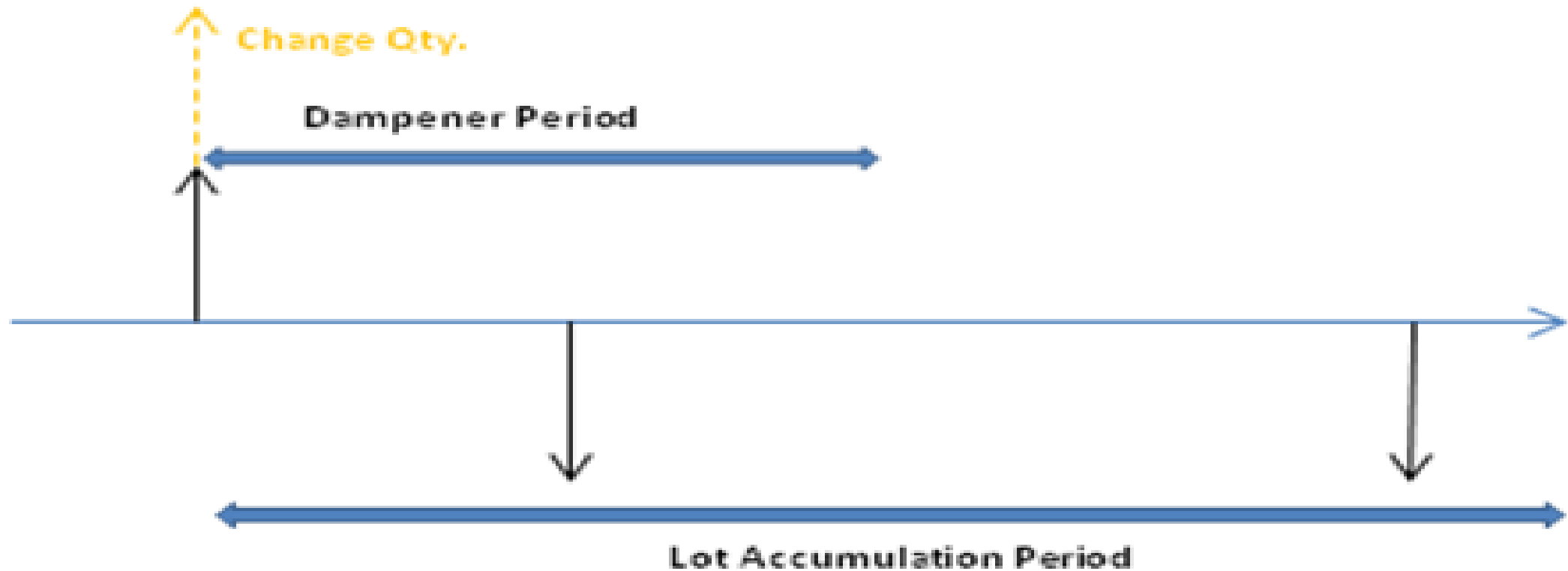




# Example 3:



# Example 4:



## ✓ The Planning enhancements

### ✓ Additional Planning Setup Options

- New layout on Item/SKU card
- Changes to the Planning and Req. Worksheet
- Integration to Jobs and Assembly

## ■ Inventory Visualizations

- by Event (data for the Timeline)
- by Timeline

# NAV 2009 R2

Planning

Reordering Policy:	Fixed Reorder Qty.	Safety Stock Quantity:	0
Include Inventory:	<input checked="" type="checkbox"/>	Reorder Point:	0
Reserve:	Optional	Reorder Quantity:	100
Order Tracking Policy:	None	Maximum Inventory:	0
Stockkeeping Unit Exists:	No	Minimum Order Quantity:	0
Critical:	<input type="checkbox"/>	Maximum Order Quantity:	0
Reorder Cycle:	1W	Order Multiple:	0
Safety Lead Time:			

# NAV 2013

Planning

Reordering Policy:	Fixed Reorder Qty.	<b>Lot-for-Lot Parameters</b>		
Reserve:	Optional	Include Inventory:	<input checked="" type="checkbox"/>	
Order Tracking Policy:	None	Lot Accumulation Period:		
Stockkeeping Unit Exists:	No	Rescheduling Period:		
Dampener Period:		<b>Reorder-Point Parameters</b>		
Dampener Quantity:	0	Reorder Point	Reorder Quantity	Maximum Inventory
Critical:	<input type="checkbox"/>	0	100	0
Safety Lead Time:		<b>Order Modifiers</b>		
Safety Stock Quantity:	0	Minimum Order Quantity	Maximum Order Quantity	Order Multiple
		0	0	0

Show more fields

# Grouping of fields per Reordering Policy

Planning

Reordering Policy: **Lot-for-Lot**

Reserve: Optional

Order Tracking Policy: None

Stockkeeping Unit Exists: No

Dampener Period:

Dampener Quantity: 0

Critical: ☐

Safety Lead Time:

Safety Stock Quantity: 0

**Lot-for-Lot Parameters**

Include Inventory: ☒

Lot Accumulation Period:

Rescheduling Period:

**Reorder-Point Parameters**

Reorder Point	Reorder Quantity	Maximum Inventory
0	100	0

**Order Modifiers**

Minimum Order Quantity	Maximum Order Quantity	Order Multiple
0	0	0

Show more fields

# Grouping of fields per Reordering Policy



Planning

Reordering Policy:	Fixed Reorder Qty.
Reserve:	Optional
Order Tracking Policy:	None
Stockkeeping Unit Exists:	No
Dampener Period:	
Dampener Quantity:	0
Critical:	<input type="checkbox"/>
Safety Lead Time:	
Safety Stock Quantity:	0

**Lot-for-Lot Parameters**

Include Inventory: ☒

Lot Accumulation Period:

Rescheduling Period:

**Reorder-Point Parameters**

Reorder Point	Reorder Quantity	Maximum Inventory
0	100	0

**Order Modifiers**

Minimum Order Quantity	Maximum Order Quantity	Order Multiple
0	0	0

⌵ Show more fields

# Show fewer or more fields

Planning

Reordering Policy: Fixed Reorder Qty. ▼

Reserve: Optional ▼

**Lot-for-Lot Parameters**

Include Inventory: ☒

Lot Accumulation Period:

Rescheduling Period:

**Reorder-Point Parameters**


Reorder Point	Reorder Quantity	Maximum Inventory
<input type="text" value="0"/>	<input type="text" value="100"/>	<input type="text" value="0"/>

Overflow Level:

Time Bucket:

**Order Modifiers**

Minimum Order Quantity	Maximum Order Quantity	Order Multiple
<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

 Show fewer fields

# Using GridLayout

Planning

Reordering Policy: Fixed Reorder Qty. ▼

Reserve: Optional ▼

**Lot-for-Lot Parameters**

Include Inventory: ☒

Lot Accumulation Period:



Rescheduling Period:


**Reorder-Point Parameters**

Reorder Point  Reorder Quantity  Maximum Inventory

**Order Modifiers**

Minimum Order Quantity  Maximum Order Quantity  Order Multiple

 Show more fields



## ✓ The Planning enhancements

- ✓ Additional Planning Setup Options

- ✓ New layout on Item/SKU card

- Changes to the Planning and Req. Worksheet

- Integration to Jobs and Assembly

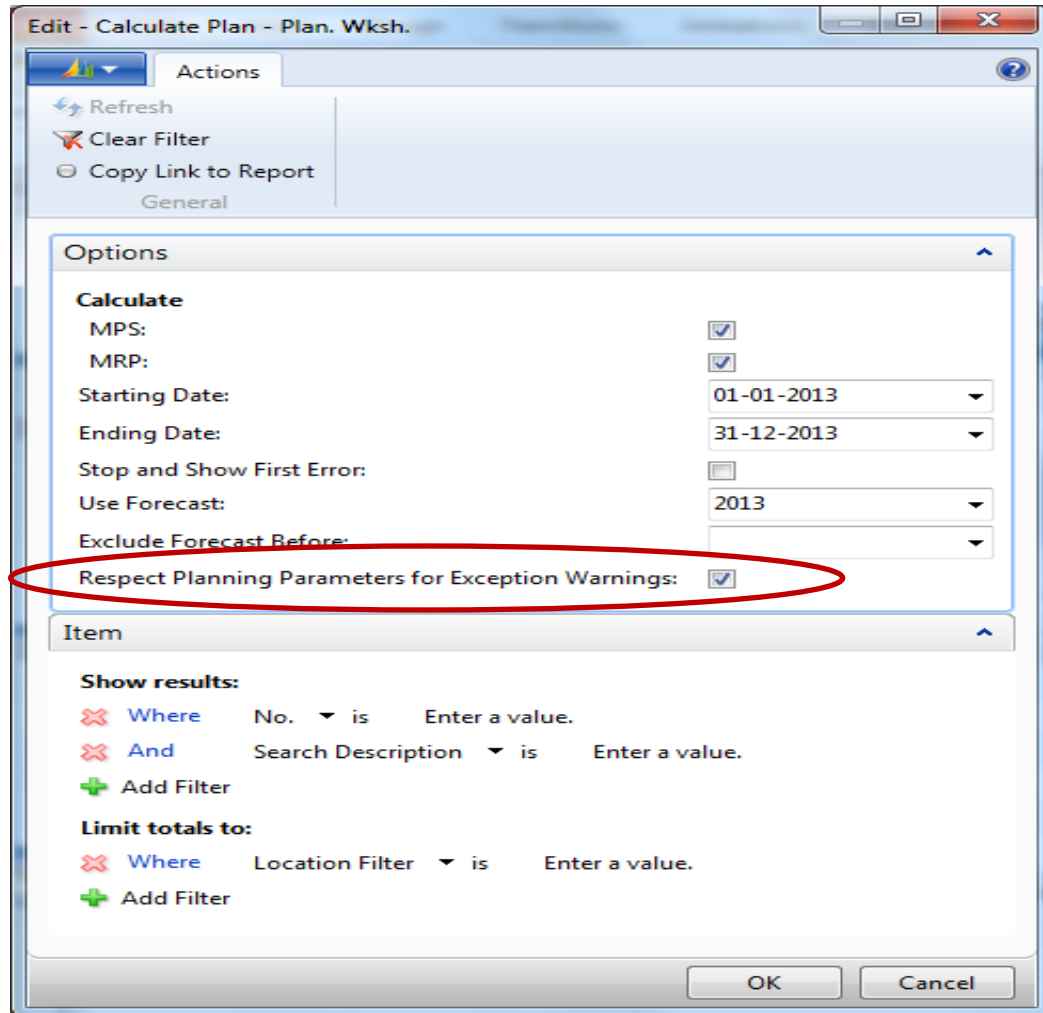
## ■ Inventory Visualizations

- by Event (data for the Timeline)

- by Timeline

# Respect Planning Parameters

## Planning Worksheet



Edit - Calculate Plan - Plan. Wksh.

Actions

- Refresh
- Clear Filter
- Copy Link to Report

General

Options

**Calculate**

MPS: ☒

MRP: ☒

Starting Date: 01-01-2013

Ending Date: 31-12-2013

Stop and Show First Error: ☐

Use Forecast: 2013

Exclude Forecast Before:

**Respect Planning Parameters for Exception Warnings:** ☒

Item

**Show results:**

Where No. is Enter a value.

And Search Description is Enter a value.

Add Filter

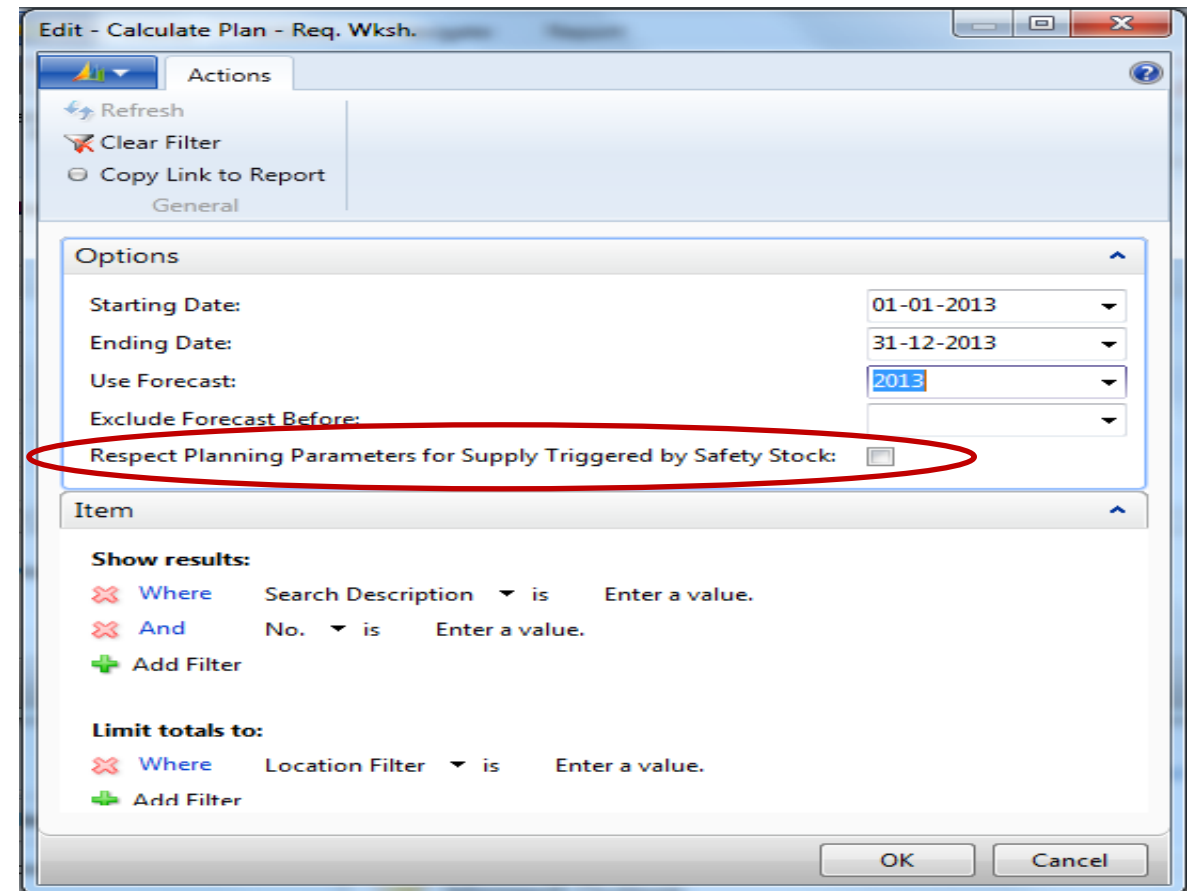
**Limit totals to:**

Where Location Filter is Enter a value.

Add Filter

OK Cancel

## Req. Worksheet



Edit - Calculate Plan - Req. Wksh.

Actions

- Refresh
- Clear Filter
- Copy Link to Report

General

Options

Starting Date: 01-01-2013

Ending Date: 31-12-2013

Use Forecast: 2013

Exclude Forecast Before:

**Respect Planning Parameters for Supply Triggered by Safety Stock:** ☐

Item

**Show results:**

Where Search Description is Enter a value.

And No. is Enter a value.

Add Filter

**Limit totals to:**

Where Location Filter is Enter a value.

Add Filter

OK Cancel

# Respect Planning Parameters

## For Supply Triggered by Safety stock -

When this field is selected, then planning lines with Exception warnings will respect the following planning parameters on the item or SKU card:

Parameter type	Reordering policy	Parameter
Reorder-Point Parameters	Fixed Reorder Qty.	Reorder Point
		Reorder Quantity
	Maximum Qty.	Reorder Point
		Maximum Inventory

In addition, the following order modifiers will be respected:

- Minimum Order Quantity
- Maximum Order Quantity
- Order Multiple

## ✓ The Planning enhancements

- ✓ Additional Planning Setup Options
- ✓ New layout on Item/SKU card
- ✓ Changes to the Planning and Req. Worksheet
  - Integration to Jobs and Assembly

## ■ Inventory Visualizations

- by Event (data for the Timeline)
- by Timeline

# Supply Included in Planning

## Supply types

- Already in inventory: Item Ledger Entry (Planning Flexibility = None)
- Sales Return Order (Planning Flexibility = None)
- Inbound Transfer Order
- Production Order
- Purchase Order

## New in NAV 2013

- Assembly Order

# Demand Included in Planning

## Demand types

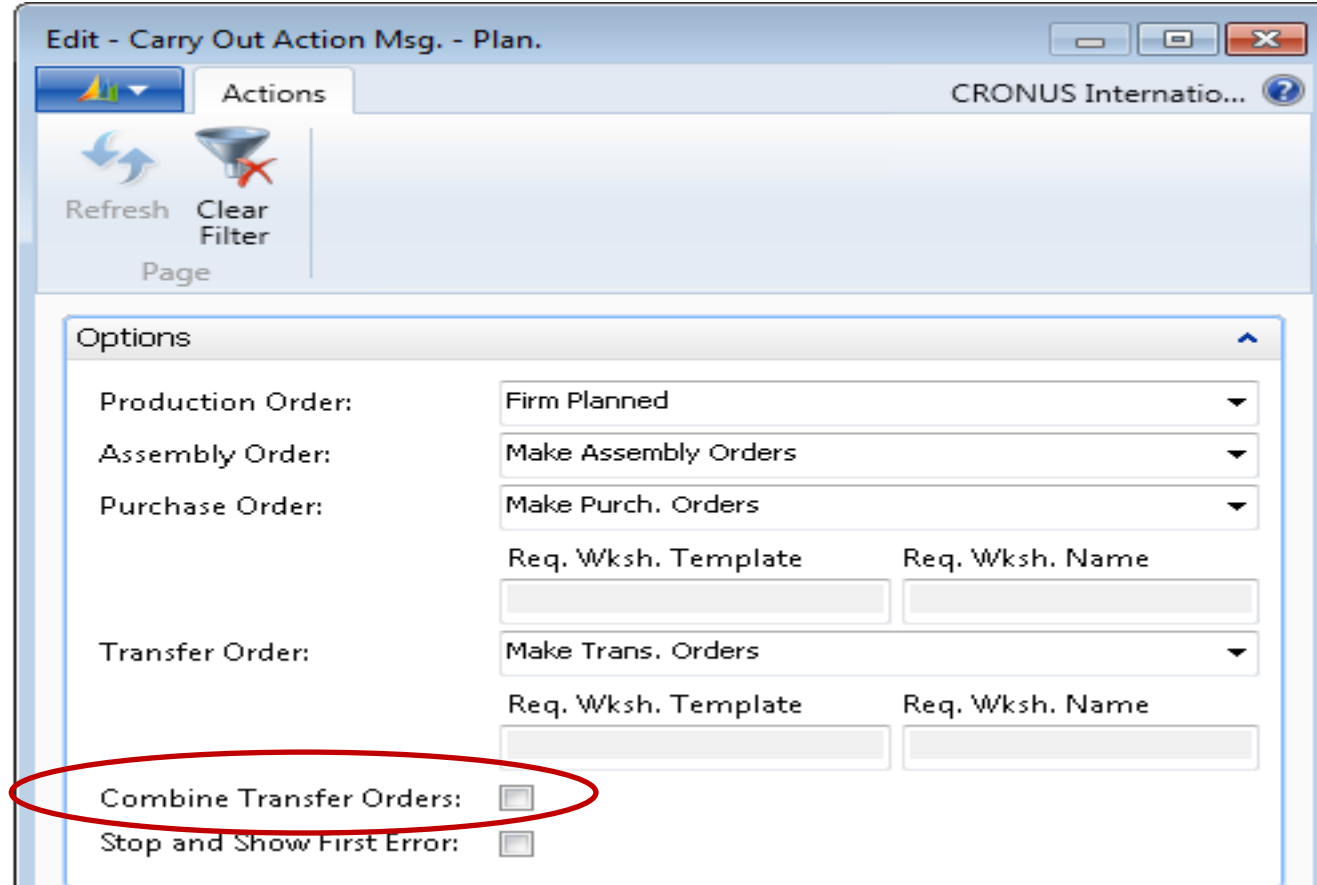
- Already shipped: Item Ledger Entry
- Purchase Return Order (usually not involved in supply planning)
- Sales Order
- Service Order
- Component need from Production
- Outbound Transfer Order
- Blanket Order (not already consumed by related sales orders)
- Forecast (not already consumed by other sales orders)

## New in NAV 2013

- Component need from Assembly
- Job Planning line (When Usage Link is selected)
  - Jobs Setup option: Apply Usage Link by Default

# Combine Transfer orders

New option on Carry Out Action Msg. -



Edit - Carry Out Action Msg. - Plan.

CRONUS Internatio...

Refresh Clear Filter

Page

Options

Production Order: Firm Planned

Assembly Order: Make Assembly Orders

Purchase Order: Make Purch. Orders

Req. Wksh. Template Req. Wksh. Name

Transfer Order: Make Trans. Orders

Req. Wksh. Template Req. Wksh. Name

Combine Transfer Orders: ☐

Stop and Show First Error: ☐

## Demo:

- ❖ Planning Supply of Items with Lot-for-Lot Reordering Policy in Microsoft Dynamics NAV 2013



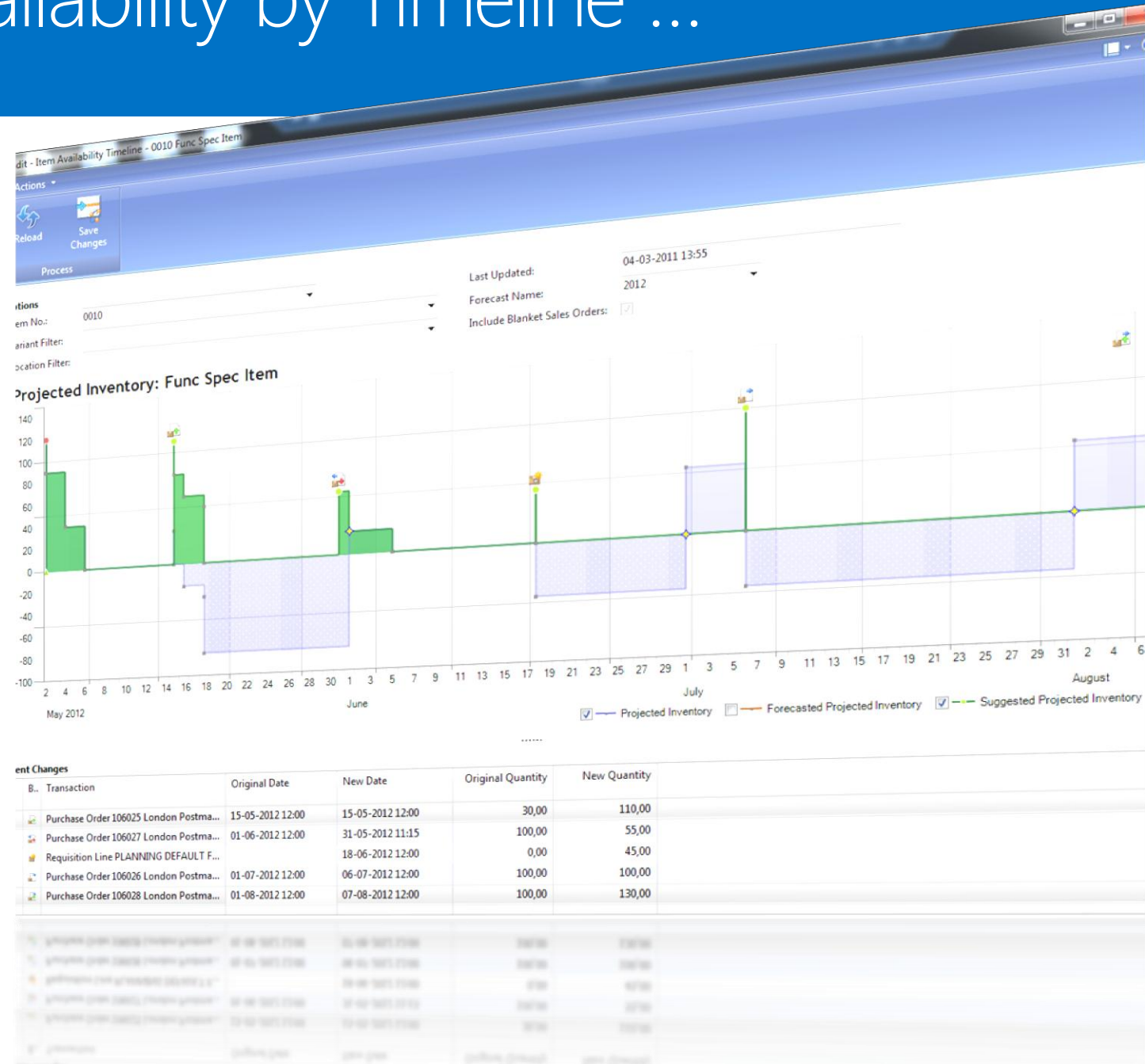
## Demo:

- ❖ Planning Supply of Items with Fixed Reorder Qty. and Maximum Qty. Reordering Policies in Microsoft Dynamics NAV 2013

- ✓ The Planning enhancements
  - ✓ Additional Planning Setup Options
  - ✓ New layout on Item/SKU card
  - ✓ Changes to the Planning and Req. Worksheet
  - ✓ Integration to Jobs and Assembly
- **Inventory Visualizations**
  - by Event (data for the Timeline)
  - by Timeline

- ✓ The Planning enhancements
  - ✓ Additional Planning Setup Options
  - ✓ New layout on Item/SKU card
  - ✓ Changes to the Planning and Req. Worksheet
  - ✓ Integration to Jobs and Assembly
- ✓ **Inventory Visualizations**
  - ✓ by Event (data for the Timeline)
  - by Timeline

# And Item Availability by Timeline ...



## ✓ The Planning enhancements

- ✓ Additional Planning Setup Options
- ✓ New layout on Item/SKU card
- ✓ Changes to the Planning and Req. Worksheet
- ✓ Integration to Jobs and Assembly

## ✓ Inventory Visualizations

- ✓ by Event (data for the Timeline)
- ✓ by Timeline

- The Planning enhancements
- Inventory Visualizations

# Questions?



Thank

You



# ***Microsoft***<sup>®</sup>

***Your potential. Our passion.***<sup>™</sup>