

Order Promising:

An Underutilized Feature in Business Central

Presented by:





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Agenda



Sales Order Promising

- Key Concepts
- Set Up
- Sales Order Promising in Action



Sales Order Promising in Business Central is based on two key concepts:

- Available to Promise (ATP)
- Capable to Promise (CTP)

Available to promise (ATP)

Calculates dates based on availability of unreserved quantities in the system for:

- Existing Inventory
- Planned Production or Assembly
- Purchases
- Transfers
- Sales Returns

Capable to promise (CTP)

Items are NOT in inventory and no supply orders are scheduled

Estimates the earliest date that the item can be available if it needs to be:

- Produced
- Purchased
- Transferred

Based on the estimated availability date of the item, Business Central will:

- Calculate the delivery date to the customer
- Create planning line(s) for the item
- Reserve the inventory



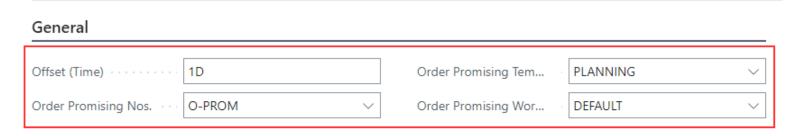
Sales Order Promising Set Up:

- Order Promising Setup Page
- Company Information Page

- Location Card
- Customer Card
- Item Card

Order Promising Set Up:

Order Promising Setup



Offset (Time) - Specifies the period to wait before issuing a new purchase order, production order, or transfer order.

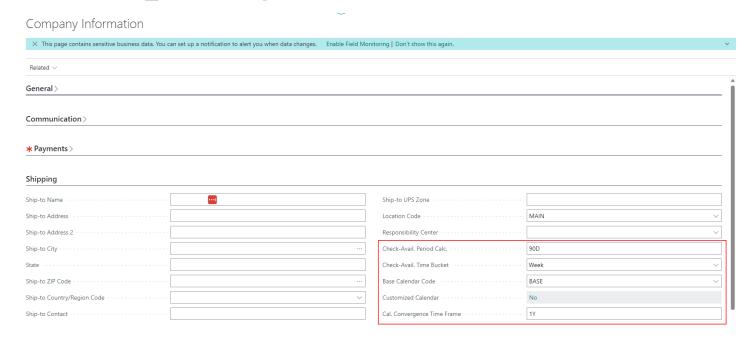
Order Promising Nos. - Specifies the number series for order promising.

Order Promising Template - Specifies the requisition worksheet template used for order promising.

Order Promising Worksheet - Specifies the requisition worksheet selected for order promising.



Company Information Set Up



Check-Avail. Period Calc. - Microsoft default is 90D

Cal. Convergence Time Frame - Microsoft default is 1Y

Check-Avail. Period Calc. – How far out past the planned shipment date the system will check availability for demand

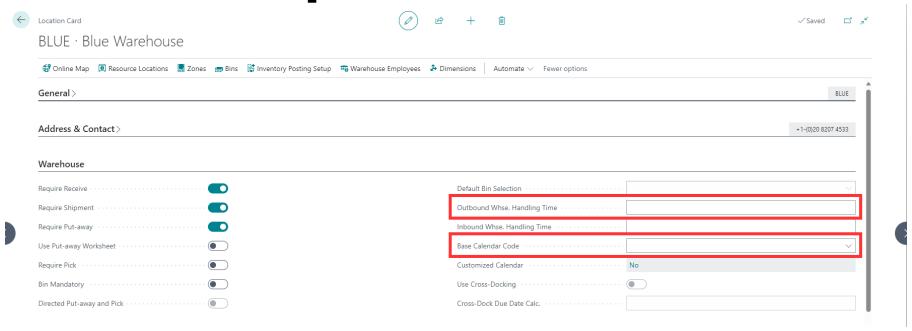
Check-Avail. Time Bucket – How often the system checks supply/demand events for availability.

Base Calendar Code – Specifies the base calendar that you want to assign to your company.

Cal. Convergence Time Frame - Specifies how dates based on calendar and calendar-related documents are calculated.



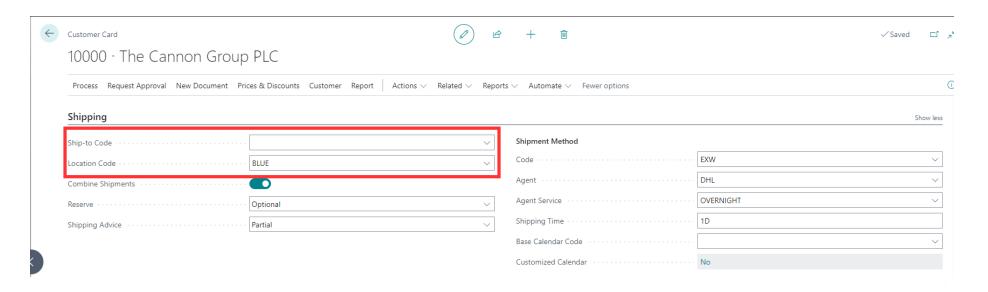
Location Set Up:



Outbound Whse. Handling Time- Specifies a date formula for the time it takes to get items ready to ship from this location.

Base Calendar Code - Specifies a customizable calendar for planning that holds the location's working days and holidays.

Customer Card Set Up:

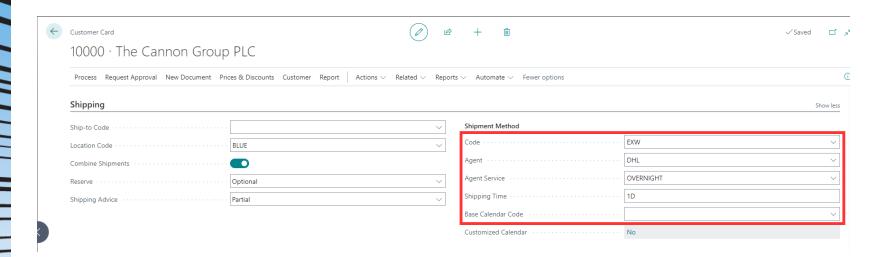


Ship-to Code- Specifies the code for another shipment address than the customer's own address, which is entered by default.

Location Code - Specifies from which location sales to this customer will be processed by default.



Customer Card Set Up:



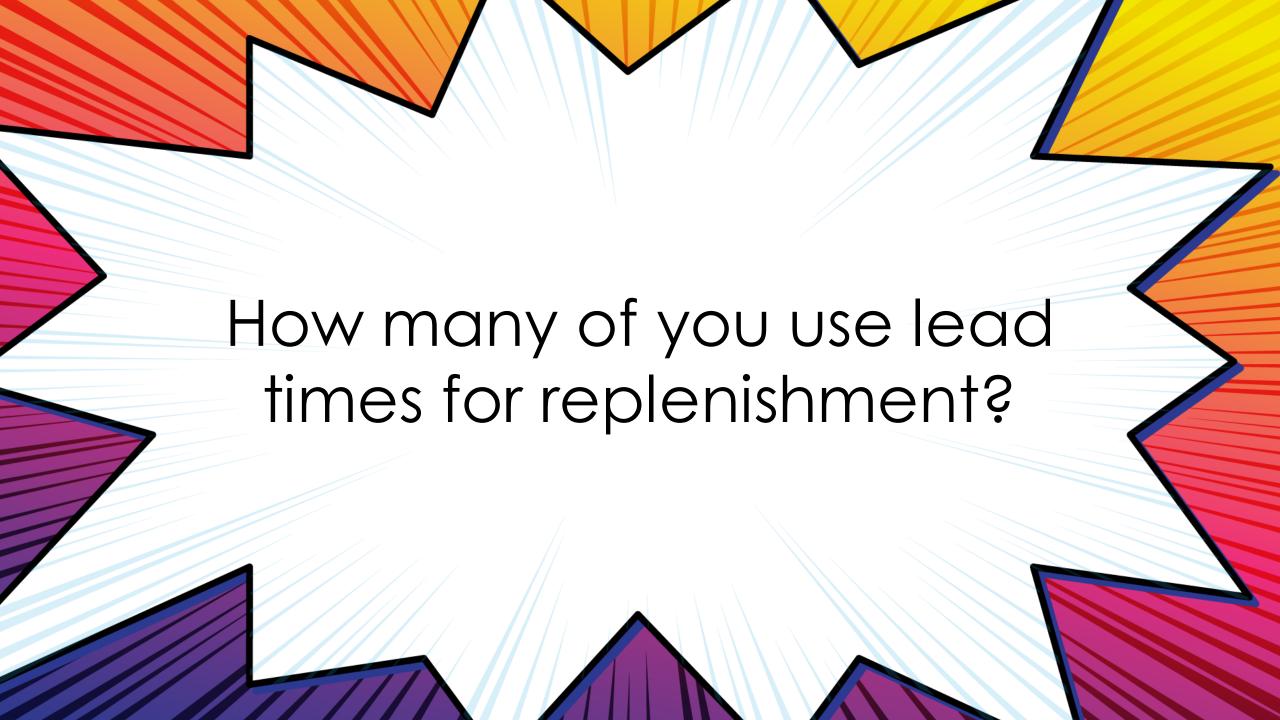
Shipment Method Code-Specifies which shipment method to use when you ship items to the customer.

Shipment Method Agent Code - Specifies which shipping company is used when you ship items to the customer.

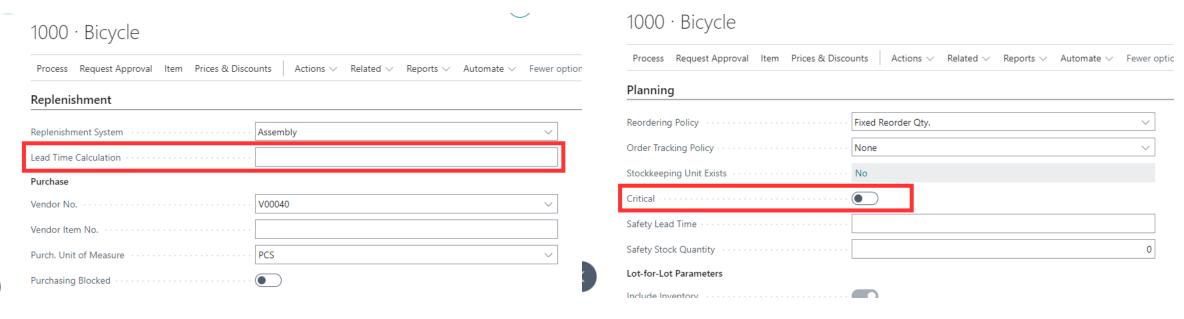
Agent Service - Specifies the code for the shipping agent service to use for this customer.

Shipping Time - The time between when the items ship from your warehouse and when they arrive at the customer's address.

Base Calendar Code - Specifies a customizable calendar for shipment planning that holds the customer's working days and holidays.



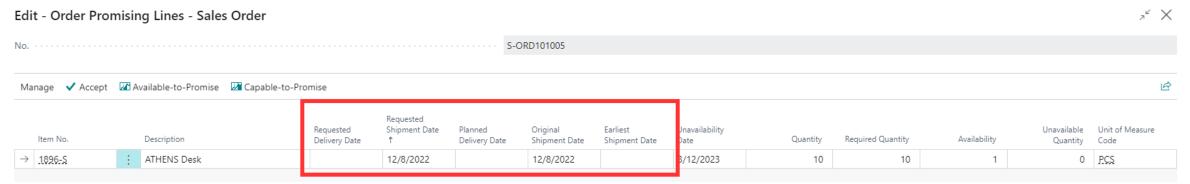
Item Card Set Up:



Lead Time Calculation- Specifies a date formula for the amount of time it takes to replenish the item.

Critical - Specifies if the item is included in availability calculations to promise a shipment date for its parent item.

SO Promising Field Definitions



Requested Delivery Date: The date the customer wants the order delivered to the customer's address. You must manually enter this date to affect the date calculation.

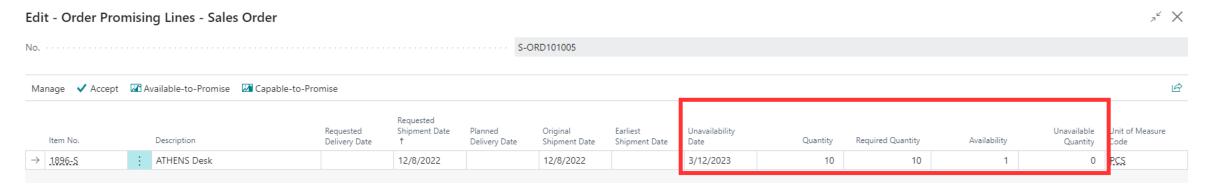
Requested Shipment Date: Specifies the delivery date that the customer requested, minus the shipping time.

Planned Delivery Date: The date the company plans to deliver the order to the customer's address. This date calculates automatically but you can change it.

Original Shipment Date: Specifies the shipment date of the entry.

Earliest Shipment Date: Specifies the Capable to Promise function as the earliest possible shipment date for the item.

SO Promising Field Definitions



Unavailability Date: Specifies the date when the order promising line is no longer available.

Quantity: Specifies the number of units, calculated by subtracting the reserved quantity from the outstanding quantity in the Sales Line table.

Required Quantity: Specifies the quantity required for order promising lines.

Availability: Specifies how many units of the item on the order promising line are available.

Unavailable Quantity: Specifies the quantity of items that are not available for the requested delivery date on the order.

Date Calculations

Shipment Date + Outbound Whse. Handling Time = Planned Shipment Date



Planned Shipment Date + Shipping Time = **Planned Delivery Date**



Date Calculations

Requested/Promised Delivery Date – Shipping Time = **Planned Shipment Date**



Planned Shipment Date – Outbound Whse. Handling Time = **Shipment Date**

If a date is entered into the Promised Delivery Date field, this substitutes for the Requested Delivery Date.

You can calculate on a request or a promise, but not both.





Sales Order Promising



Live Demo



