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Order Promising:

An Underutilized Feature in Business Central



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How many of you have seen/used
Order Promising before today?

Agenda

The background features a stylized sunset with a gradient from orange to blue. In the foreground, there are silhouettes of two superheroes, one with a cape, standing on a rocky outcrop. The sky is filled with large, white, scalloped-edged clouds.

Sales Order Promising

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

Key Concepts Of Sales Order Promising

The background of the slide is a stylized landscape illustration. It features a bright blue sky with numerous thin, white, radiating lines emanating from the top center, creating a sunburst effect. Below the sky is a layer of white, fluffy clouds. The middle ground consists of several layers of purple mountains, with the colors becoming darker and more saturated as they recede into the distance. In the foreground, there are dark blue hills with silhouettes of evergreen trees. The overall aesthetic is clean and modern, using a limited color palette of blues, purples, and whites.

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



Set Up Of Sales Order Promising

The background of the slide is a stylized landscape illustration. At the top, a bright yellow sunburst radiates across the entire frame. Below the sunburst is a layer of white, fluffy clouds. Underneath the clouds are several layers of silhouetted mountains and hills. The foreground features rolling hills with silhouetted evergreen trees. The color palette is warm, consisting of various shades of yellow, orange, and red, creating a sunset or sunrise atmosphere.

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

General

Offset (Time)	<input type="text" value="1D"/>	Order Promising Tem...	<input type="text" value="PLANNING"/>
Order Promising Nos. ...	<input type="text" value="O-PROM"/>	Order Promising Wor...	<input type="text" value="DEFAULT"/>

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

Company Information

× This page contains sensitive business data. You can set up a notification to alert you when data changes. Enable Field Monitoring | Don't show this again.

Related ▾

General >

Communication >

* Payments >

Shipping

Ship-to Name	<input type="text"/>	Ship-to UPS Zone	<input type="text"/>
Ship-to Address	<input type="text"/>	Location Code	MAIN ▾
Ship-to Address 2	<input type="text"/>	Responsibility Center	<input type="text"/>
Ship-to City	<input type="text"/>	Check-Avail. Period Calc.	90D
State	<input type="text"/>	Check-Avail. Time Bucket	Week ▾
Ship-to ZIP Code	<input type="text"/>	Base Calendar Code	BASE ▾
Ship-to Country/Region Code	<input type="text"/>	Customized Calendar	No
Ship-to Contact	<input type="text"/>	Cal. Convergence Time Frame	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.

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

Cal. Convergence Time Frame - Microsoft default is 1Y



Location Set Up:

Location Card

BLUE · Blue Warehouse

Online Map Resource Locations Zones Bins Inventory Posting Setup Warehouse Employees Dimensions Automate Fewer options

General > BLUE

Address & Contact > +1-(0)20 8207 4533

Warehouse

Require Receive

Require Shipment

Require Put-away

Use Put-away Worksheet

Require Pick

Bin Mandatory

Directed Put-away and Pick

Default Bin Selection

Outbound Whse. Handling Time

Inbound Whse. Handling Time

Base Calendar Code

Customized Calendar No

Use Cross-Docking

Cross-Dock Due Date Calc.

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:

Customer Card

10000 · The Cannon Group PLC

Process Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Shipping

Ship-to Code
Location Code BLUE
Combine Shipments
Reserve Optional
Shipping Advice Partial

Shipment Method

Code EXW
Agent DHL
Agent Service OVERNIGHT
Shipping Time 1D
Base Calendar Code
Customized Calendar No

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:

The screenshot shows a 'Customer Card' setup page for '10000 · The Cannon Group PLC'. The page has a navigation bar with options like 'Process', 'Request Approval', 'New Document', 'Prices & Discounts', 'Customer', 'Report', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. The main content area is titled 'Shipping' and contains two columns of dropdown menus. The left column includes 'Ship-to Code', 'Location Code' (set to 'BLUE'), 'Combine Shipments' (checked), 'Reserve' (set to 'Optional'), and 'Shipping Advice' (set to 'Partial'). The right column is titled 'Shipment Method' and includes 'Code' (set to 'EXW'), 'Agent' (set to 'DHL'), 'Agent Service' (set to 'OVERNIGHT'), 'Shipping Time' (set to '1D'), 'Base Calendar Code' (empty), and 'Customized Calendar' (set to 'No'). A red box highlights the 'Shipment Method' section.

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.





How many of you use lead times for replenishment?

Item Card Set Up:

1000 · Bicycle

Process Request Approval Item Prices & Discounts Actions Related Reports Automate Fewer options

Replenishment

Replenishment System Assembly

Lead Time Calculation

Purchase

Vendor No. V00040

Vendor Item No.

Purch. Unit of Measure PCS

Purchasing Blocked

1000 · Bicycle

Process Request Approval Item Prices & Discounts Actions Related Reports Automate Fewer options

Planning

Reordering Policy Fixed Reorder Qty.

Order Tracking Policy None

Stockkeeping Unit Exists No

Critical

Safety Lead Time

Safety Stock Quantity 0

Lot-for-Lot Parameters

Include Inventory

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

Edit - Order Promising Lines - Sales Order

No. S-ORD101005

Manage Accept Available-to-Promise Capable-to-Promise

Item No.	Description	Requested Delivery Date	Requested Shipment Date ↑	Planned Delivery Date	Original Shipment Date	Earliest Shipment Date	Unavailability Date	Quantity	Required Quantity	Availability	Unavailable Quantity	Unit of Measure Code
→ 1896-S	ATHENS Desk		12/8/2022		12/8/2022		3/12/2023	10	10	1	0	PCS

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

Edit - Order Promising Lines - Sales Order

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Item No.	Description	Requested Delivery Date	Requested Shipment Date ↑	Planned Delivery Date	Original Shipment Date	Earliest Shipment Date	Unavailability Date	Quantity	Required Quantity	Availability	Unavailable Quantity	Unit of Measure Code
→ 1896-S	ATHENS Desk		12/8/2022		12/8/2022		3/12/2023	10	10	1	0	PCS

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.



Any questions about what
we've covered so far?



Sales Order Promising

IN

ACTION!



Live Demo





Any Questions?



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