Enhanced Planning Worksheet Battle Card

For Microsoft Partners who sell Insight Works apps

Enhanced Planning Worksheet adds planning summaries, availability by location, history, and vendor thresholds to the planning worksheet in Microsoft Dynamics 365 Business Central. Planners can check and correct a suggestion without leaving the line.

WHO TO CALL ON

Distribution and purchasing teams on Business Central online that plan replenishment by stockkeeping unit.

Users include planners and buyers, including purchasing teams that split responsibility by vendor.

AT A GLANCE

Business Central	Business Central online
Licensing	Free for one named user; subscription for additional users
User license	Business Central user license
Planning basis	Stockkeeping units
Availability	All countries where Business Central is available

What changes when you add Enhanced Planning Worksheet to Business Central

	Business Central without Enhanced Planning Worksheet	Business Central with Enhanced Planning Worksheet
Planning suggestions	An unexpected quantity sends planners into the item card, the stockkeeping unit, and ledger entries to find out why.	Supply, demand, history, and availability by location appear on the same page. The Chart tab shows item usage over time.
Planning parameters	An outdated reorder point keeps producing wrong suggestions until someone leaves the worksheet to find it.	The Planning tab shows the stockkeeping unit's planning fields for editing in place. The next planning run uses the corrected values.
Action messages	In a high-change distribution environment, reviewing reschedule and cancel messages can take more time than placing orders.	Calculate Purchase Plan plans from each stockkeeping unit's reorder point or maximum, without date-phasing, from the worksheet or the job queue.
Vendor minimums	Without a running total per vendor, buyers miss prepaid freight thresholds or order more than they need.	The Enhanced Plan Vendor Summary shows the amount and weight still needed for each vendor's prepaid minimum.

Selling points

The reason behind each line.
Supply, demand, history, and availability by location appear in FactBoxes and tabs.

Fewer action messages.
Calculate Purchase Plan skips date-phasing and runs on demand or through the job queue.

Manufactured items too.
Calculate Purchase Plan also plans multi-level production orders.

Fix parameters in place.
Edit reorder point, maximum inventory, and order modifiers on the Planning tab.

Vendor prepaid thresholds.
Approved lines total by vendor against each prepaid minimum, by amount and weight.

Free for one user.
One named user per Business Central online environment gets every feature free, with no time limit.

Qualify the opportunity

1. Are you on Business Central online today, or another ERP system?
2. How do you handle inventory planning today? Is it manual or automated?
3. How often do you run out of stock or carry too much?
4. Do you plan by stockkeeping unit, or by item or category?
5. How do planners check why the planning worksheet suggests a quantity?
6. Do reschedule and cancel messages take up much of your planners' time?
7. How do you track vendor prepaid freight minimums when planning purchases?
8. How do you create purchase orders from planning results today?
9. How do you plan replenishment across multiple locations?
10. How many people plan, and do buyers split responsibility by vendor?

Common questions

Where does it run?
Enhanced Planning Worksheet runs on Business Central online, where the free single-user license applies.

What Business Central license is needed?
Each user needs a Business Central user license.

Does it plan manufactured items?
Yes. In the latest release, Calculate Purchase Plan plans multi-level production orders, and the standard regenerative plan also runs from the same worksheet.

Is it part of a bundle?
Yes. It is also included in Enhanced Planning Pack, Insight Works' set of planning and production analysis components.

How is it licensed?
One named user in each Business Central online environment can use every feature free, with no time limit. Additional users need a subscription.

What setup does Calculate Purchase Plan need?
Turn on Extended Purchase Planning on the Enhanced Planning Worksheet Setup page. The plan works from stockkeeping units, so items without one are not included.

Can buyers create purchase orders from it?
Yes. Run the plan from the worksheet or on a schedule through the job queue, then create purchase orders from the results.

> **Customer also needs forecasting and production analysis?** Position Enhanced Planning Pack, Insight Works' set of planning and production analysis components. Enhanced Planning Worksheet is included in it.

Resources

Sales kit: insight-works.com/partner-hub/enhanced-planning-worksheet

App page and demo: insight-works.com/apps/enhanced-planning-worksheet

Datasheet: Enhanced Planning Worksheet datasheet (PDF)

Partner hub: insight-works.com/partner-hub

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For a pre-sales meeting, a demo, or implementation guidance, send a message at insight-works.com/partner-hub/contact.

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