Item Planning Review Battle Card

For Microsoft Partners who sell Insight Works apps

Item Planning Review shows average inventory usage over a chosen period next to each item's planning parameters in Microsoft Dynamics 365 Business Central. Planners change reorder points, safety stock, and minimum and maximum levels on the same page.

WHO TO CALL ON

Companies on Business Central that manage reorder points, including manufacturers whose items are consumed in production rather than sold.

Users are planners reviewing items or stockkeeping units.

AT A GLANCE

Business Central	Online and on-premises
Licensing	Per company, subscription
User license	Full user license, Essentials or Premium tier
Included in	Enhanced Planning Pack
Availability	All countries where Business Central is available

What changes when you add Item Planning Review to Business Central

	Business Central without Item Planning Review	Business Central with Item Planning Review
Usage versus settings	Planning parameters are often set once and left alone while demand shifts. A stale reorder point either ties up stock or lets it run short.	Item Planning Review lists average usage beside each item's planning parameters, inventory, and sales quantity. Usage includes consumption and output, so production items show real demand.
Editing parameters	Adjusting reorder points one item card at a time is slow, so reviews get postponed. Comparing items side by side is hard.	A planning area shows the selected row's replenishment, reorder point, and order modifier fields, and edits write back. Update Item Planning applies changes across rows.
Your own rules	Every business has its own rule for safety stock and reorder points. A fixed formula rarely fits all of them.	Setup holds expressions for safety stock, reorder point, reorder quantity, and maximum inventory, using variables such as average daily usage and lead time in days.

Selling points

Usage beside parameters.
Average usage over your chosen period sits beside each item's planning parameters, inventory, and sales quantity.

Edit in one place.
Edits in the planning area write back to the item or stockkeeping unit.

Your own formulas.
Setup expressions calculate safety stock, reorder point, reorder quantity, and maximum inventory, with rounding rules.

Production demand counts.
By default, usage counts consumption, output, assembly consumption and output, negative adjustments, and sales.

Changes across rows.
Update Item Planning applies changes across rows after a confirmation.

Part of Enhanced Planning Pack.
Partners order it as part of the Enhanced Planning Pack, and it has its own Microsoft Marketplace listing.

Qualify the opportunity

1. Are you on Business Central today, or another ERP system?
2. How do you set and update reorder points today? Manually or automatically?
3. How often do you run out of stock or carry too much?
4. When did you last review reorder points against actual usage?
5. Do you use average usage from history to set planning parameters?
6. Do you plan items consumed in production that are never sold?
7. Do you plan by item, by stockkeeping unit, or both?
8. Do you have your own rules for safety stock and reorder points?
9. How far back does your posted item history go in Business Central?
10. Will you run Business Central online or on-premises?

Common questions

Does it run on Business Central online?
Yes. Item Planning Review runs on Business Central online and on-premises.

Is it on Microsoft Marketplace?
Yes. Item Planning Review also has its own Microsoft Marketplace listing.

What data does it need?
Usage comes from posted item ledger entries. The chosen period needs enough posted history to give a reliable average.

Which entries count as usage?
By default, consumption, output, assembly consumption and output, negative adjustments, and sales. An item ledger filter controls which entry types count.

How is it licensed?
Item Planning Review is a subscription licensed per company. Partners order it as part of the Enhanced Planning Pack.

What Business Central license is needed?
Users need a full user license on the Business Central Essentials or Premium tier.

Does it work with stockkeeping units?
Yes. Planners review and change parameters for items or stockkeeping units, and edits write back to the item or stockkeeping unit.

> **Customer also needs forecasting or BOM review?** Position Enhanced Planning Pack, Insight Works' bundle of planning apps. Item Planning Review is one of its components, and partners order it as part of the pack.

Resources

Sales kit: insight-works.com/partner-hub/item-planning-review

App page and demo: insight-works.com/apps/item-planning-review

Datasheet: Item Planning Review 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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