INSIGHT WORKS

ENHANCED PLANNING WORKSHEET

for Microsoft Dynamics 365 Business Central

FREE FOR ONE USER, FOR BUSINESS CENTRAL



ALIGN INVENTORY WITH DEMAND AND OPTIMIZE VENDOR-DRIVEN PURCHASING.

An SKU-based planning worksheet for Business Central that puts supply, demand, history, and vendor thresholds on one screen.

Enhanced Planning Worksheet is an Insight Works extension for Business Central. It runs Business Central's standard regenerative plan alongside a second, distribution-oriented calculation called Calculate Purchase Plan, and it is sold on its own and as one of the tools in Enhanced Planning Pack. The license is free for one named user in a Business Central online environment, with no time limit and no feature restrictions; additional users and on-premises deployments need a paid subscription.

Why it holds up in planning

Everything for the selected line, on one screen. FactBoxes for Planning Summary, Availability by Location, and Vendor Planning Summary, plus Chart, Planning, Order Tracking, Supply/Demand, History, and Create Purchase Orders tabs, all keyed to the SKU on the planning line.

Less planning noise. Calculate Purchase Plan plans purchases and transfers without date-phasing, which avoids the volume of reschedule and cancel messages that regenerative planning generates in high-change environments.

Plan by vendor, not only by item. Enhanced Plan Vendor Summary shows planned purchases by vendor and tracks progress against a vendor's minimum prepaid amount or weight threshold for freight discounts.

See other stock before ordering. The worksheet shows other companies' and locations' stock, so a planner can switch a line from replenish to transfer when excess stock already sits elsewhere.

Fix a number where you find it. Reorder point, minimum order quantity, and other Planning FastTab fields on the SKU or item can be edited inline from the worksheet, without opening the SKU or item card.

Runs on a schedule. Calculate Purchase Plan is pre-built for the job queue, so it can run unattended instead of waiting for a planner to trigger it. Drop shipments and special sales orders appear in the same worksheet.

Who's on it

Inventory planners
Manage stock levels and timely replenishment without overstocking.

Purchasing managers
Oversee vendor relationships and plan purchase orders at the vendor level.

Operations managers
Coordinate inventory planning across multiple locations.

Warehouse managers
Monitor stock availability across locations to support transfers.

Production planners
Align production schedules with available materials and requirements.

Free to install and evaluate. Enhanced Planning Worksheet installs at no cost from Microsoft Marketplace, so you can try it in a sandbox before committing to production. The free license covers one named user in a Business Central online environment.

Backed by over 800 resellers. Insight Works works through a global network of more than 800 Business Central resellers who can help consult, implement, and support a deployment. **See the Insight Works reseller directory**.

ENHANCED PLANNING WORKSHEET

for Microsoft Dynamics 365 Business Central

PLANNING CALCULATIONS

- Standard regenerative plan, the same MRP and MPS logic as the native planning worksheet
- Calculate Purchase Plan: plans purchases and transfers without date-phasing, for distribution-style replenishment
- Appears as an action only after the Extended Purchase Planning field is enabled on the Enhanced Planning Worksheet Setup page
- The setup page also controls whether only Released sales orders count as demand, and which service order statuses are included
- Pre-built for the job queue, so it can run unattended on a schedule

WORKSHEET SCREEN

- FactBoxes: Planning Summary, Availability by Location, Vendor Planning Summary
- Tabs: Chart, Planning, Order Tracking, Supply/Demand, History, Create Purchase Orders
- Supply, demand, and history for the selected line's SKU on the same screen, including other companies' and locations' stock

INLINE EDITING

- Edit the SKU's (or item's) Planning FastTab fields, such as reorder point and minimum order quantity, directly from the worksheet

VENDOR PLANNING

- Enhanced Plan Vendor Summary: a vendor-centric view of planned purchases
- A My Vendors list assigns specific vendors to specific purchasers
- Tracks progress against a vendor's minimum prepaid amount or weight threshold for freight discounts

DROP SHIPMENTS & SPECIAL ORDERS

- Drop shipment and special sales orders appear in the same worksheet, where standard Business Central requires the separate requisition worksheet

WHERE IT STOPS

- Calculate Purchase Plan is based on SKUs, not items; an item without an SKU is not included in that plan
- It plans production orders at the top level only, closer to an MPS plan than full MRP; exploding components for a manufactured item still relies on Business Central's regenerative plan
- Does not run its own demand forecast; that is the separate Enhanced Forecasting Worksheet

BUSINESS CENTRAL LICENSING

- Insight Works licensing: free single-user license, with a paid subscription for more
- Free: one named user per Business Central online environment, with no time limit and no feature restrictions
- A paid subscription is required to add users or to deploy on-premises
- Microsoft licensing is separate: supports Essential and Premium user licenses
- Also included in Enhanced Planning Pack

INTEGRATION & INSTALLATION

- Installs from Microsoft Marketplace like any other Business Central extension
- On Business Central 18 and newer, assign two foundational permission sets to all users; the knowledge base lists the permission set table
- Enable Calculate Purchase Plan on the setup page before it appears as an action

PREREQUISITES & COMPATIBILITY

- Business Central Cloud and Business Central On-Premises (on-premises requires the paid subscription)
- Items must be set up with stockkeeping units to be included in Calculate Purchase Plan
- Language: English. Available in all countries where Business Central is accessible

SUPPORT & RESOURCES

- Knowledge base at kb.dmsiworks.com, with separate setup and Enhanced Plan Vendor Summary articles
- Business Central resellers in the Insight Works network can help consult, implement, and support a deployment

DATA & PORTABILITY

- Inline edits are made to the standard Planning FastTab fields on the SKU or item in Business Central

ALSO FROM INSIGHT WORKS

Insight Works builds 30+ apps for Microsoft Dynamics 365 Business Central, concentrated in these areas of manufacturing and distribution. If Business Central has a gap, there's a good chance we already have a solution.

Warehouse & Inventory Management
Barcode-driven receiving, put-away, picking, cycle counting, and license plate handling.

Shipping & Fulfillment
Carrier rate shopping, pick-to-ship execution, and shipment tracking.

Quality Control & Compliance
Inspections, test management, and quality documentation.

Production Planning & Scheduling
Capacity-aware scheduling, planning worksheets, and demand forecasting.

Shop Floor Execution & Maintenance
Shop floor data capture, machine maintenance, and production analysis.

Point of Sale & Data Tools
Counter sales, document attachment, label printing, and bulk data import/export.

See all Insight Works apps for Business Central

VISIT WEBSITE

WATCH DEMO

Available on Microsoft Marketplace

Scan to visit

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