INSIGHT WORKS

ITEM PLANNING REVIEW

for Microsoft Dynamics 365 Business Central

OPTIMIZE INVENTORY MANAGEMENT BY STREAMLINING REORDER PLANNING, MINIMIZING COSTS, AND ENHANCING ACCURACY.

Average inventory usage for a chosen period, next to the planning parameters it should inform, on one screen in Business Central.

Item Planning Review is an Insight Works app for Microsoft Dynamics 365 Business Central that calculates average inventory usage over a chosen period and lets a planner review and edit item or SKU planning parameters against that usage. It is the practical alternative to forecasting: it shows what usage actually was and leaves the decision to a person. It is included as a component of the Enhanced Planning Pack and also has a Microsoft Marketplace listing of its own.

Why it holds up

Usage, not just sales. By default usage counts assembly consumption, assembly output, consumption, output, negative adjustments, and sales, so an item consumed in production rather than sold still shows its real demand.

Review and edit on one screen. Current planning parameters, actual usage, and inventory sit side by side. Reorder point, safety stock, minimum and maximum levels, and the other planning fields can be changed in place and write back to the item card.

A backward look, by design. There is no forecast to run or trust. A planner reads what usage was, compares it with the parameters in the system, and decides. Results can also go to Excel for analysis, with the decisions applied back on the same screen.

Works at the SKU level. When the location filter points at a location where a stockkeeping unit exists, the row and the planning part show that SKU's values, so a multi-location business reviews parameters per location rather than only per item.

Narrow to the items worth reviewing. Filter by period, dates, item production posting group, item category, location, reordering policy, and minimum and maximum average usage. The usage filters isolate items that are moving when they should not be, or not moving at all.

Usage and calculations are configurable. An item ledger filter on the setup page changes which entry types count as usage, and calculated expressions can reference any numeric field on the item planning buffer.

Who's on it

Inventory managers
Set reorder points against real usage and reduce excess inventory.

Purchasing managers
Use usage insight to inform vendor and order decisions.

Production planners
Align inventory parameters with production schedules and material requirements.

Supply chain analysts
Use historical usage to improve inventory flow.

Warehouse managers
See stock levels and demand to keep warehouse operations aligned with inventory needs.

Free to install and evaluate. Item Planning Review installs at no cost from Microsoft Marketplace, so you can try it in a sandbox before committing to production.

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**.

ITEM PLANNING REVIEW

for Microsoft Dynamics 365 Business Central

FILTERS & GENERATE

- Filter settings: period, start and end date, item production posting group, item category, item location, minimum and maximum average usage, and reordering policy
- Minimum and maximum average usage isolate items that are moving when they should not be, or not moving at all
- Generate returns one row per qualifying inventory item, showing its current planning parameters alongside expected inventory and sales quantity values for the date range

PLANNING PART

- A planning part along the bottom of the screen exposes the planning fields for the selected row's item
- Edits made there write back to the item card: reorder point, safety stock, minimum and maximum levels, and the other planning parameters
- SKU-aware: with the item location filter set to a location where a stockkeeping unit exists, the row and planning part show that SKU's values, and the caption changes to Stockkeeping Unit Planning

USAGE DEFINITION

- Default usage counts assembly consumption, assembly output, consumption, output, negative adjustments, and sales
- An item ledger filter on the setup page changes which entry types count; an entry type condition in that filter replaces the defaults entirely rather than adding to them

CALCULATED EXPRESSIONS

- Uses the expression evaluator shared across several Insight Works apps
- Any numeric field on the item planning buffer can be referenced in square brackets, plus the number of days in the period, lead time in days, average daily usage, and usage quantity

NAVIGATION & EXCEL

- Consolidated navigation into the relevant native Business Central availability and usage pages from a row
- Results can be sent to Excel for analysis, with the resulting decisions applied back on the same screen

SUPPORT & RESOURCES

- Knowledge base article at kb.dmsiworks.com, filed inside the Enhanced Planning Pack user guide, with related setup, entry type customization, and expression evaluator articles

WHERE IT STOPS

- Does not forecast: there is no prediction of future demand; it looks backward at actual usage and leaves the judgment to a person
- Does not plan purchases or generate suggestions; turning revised parameters into purchase or transfer orders happens elsewhere
- Accuracy depends on enough posted item ledger history in the chosen period; a short period or a new item gives an average that should not be trusted
- With a blank location filter on an item that has SKUs, the planning part shows the first SKU found, not the item card
- Usage quantity is calculated by its own method, so it can differ from usage figures in other planning tools

BUSINESS CENTRAL LICENSING

- Subscription, per company
- Compatible with Essential User and Premium User licenses
- Included as a component of the Enhanced Planning Pack, which is how it is typically ordered through Insight Works and its resellers; it also carries a Microsoft Marketplace listing of its own
- Installs at no cost from Microsoft Marketplace for evaluation, typically in a sandbox before production

INTEGRATION & INSTALLATION

- Installs from Microsoft Marketplace like any other Business Central extension
- Usage entry types are set on the app's setup page through an item ledger filter
- Reaches native Business Central availability and usage pages through consolidated navigation

PREREQUISITES & COMPATIBILITY

- Business Central Cloud and on-premises
- English; built for manufacturing and distribution
- Needs posted item ledger history for the chosen period to produce a trustworthy average

DATA & PORTABILITY

- Planning parameter edits write back to the item card or stockkeeping unit in Business Central's own tables
- Results can be sent to Excel for analysis outside 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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