



## Choose Purchase Plan: Purchase Quantity Rounding

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### Overview

You can modify the "Choose Purchase Plan" screen in the Purchasing Advisor Module to check an Item's Vendor Minimum Purchase Quantity when generating a purchase order, rounding the quantities up if the minimum quantity is not met.

### Security

In the SalesPad Security Editor (Modules>Security Editor), search for "Choose Purchase Plan" and click the checkbox to enable the functionality. In the Miscellaneous sub-settings, set *Show Rounding Options* to True.

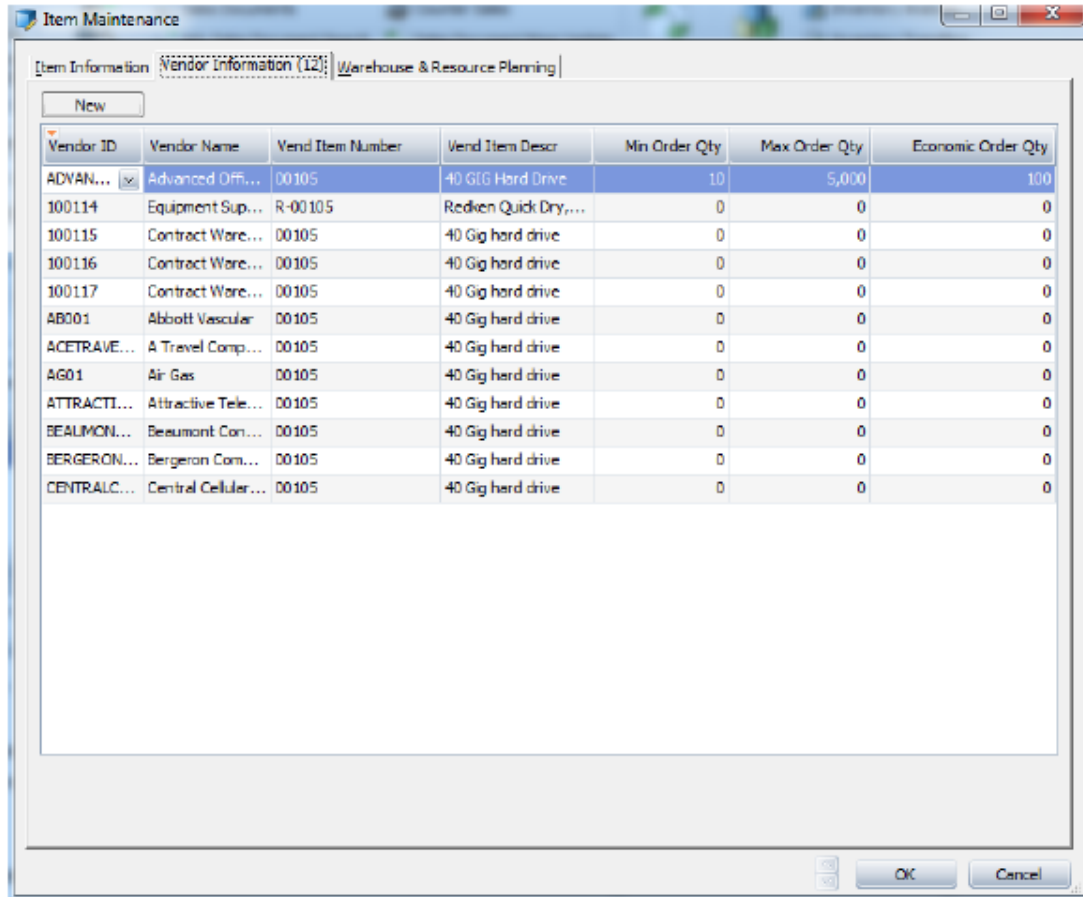
The screenshot shows the Security Editor interface. At the top, there are buttons for 'Select All', 'Select None', and 'Copy From...'. Below that is a table with columns 'Acc...' and 'Name'. The first row is 'Choose Purchase Plan\*' with a checked checkbox. Below the table is a filter bar with a red 'x' icon, a checked checkbox, and the text 'Contains([Name], 'Choose Purchase Plan')'. To the right of the filter bar is an 'Edit Filter' button. Below the filter bar is a section titled 'Misc' containing a table with two rows: 'Lock Line Item Order' with a value of 'False', and 'Show Rounding Options' with a value of 'True'. At the bottom of the window is a section titled 'Show Rounding Options' with a descriptive paragraph: 'Allows a user to select a rounding option for the purchase quantity. If set to 'Round to Closest Multiple', the purchase quantity will be set to the nearest minimum required quantity. If set to 'Increase to Next Multiple', the purchase quantity will increase to the next minimum required quantity. Defaults to 'False'.'

### Setting the Multiple Value

Before you modify the "Choose Purchase Plan" screen, you need to set the multiple value to be used for the rounding.

This can be done in the Item Maintenance window, which can be accessed from a sales document or from Inventory Lookup in SalesPad. For a detailed overview of Item Maintenance, click [here](#).

Once you have the "Item Maintenance" window open, click on the Vendor Information tab.

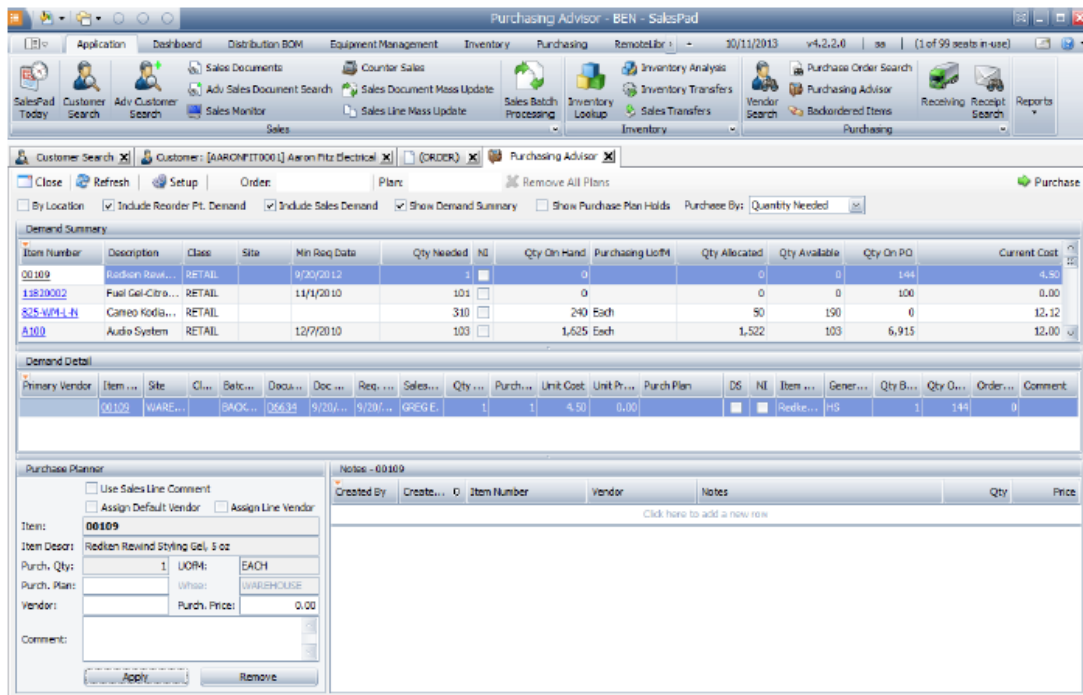


You can then choose Min Order Qty to set the multiple value for all rounding methods.

#### Usage

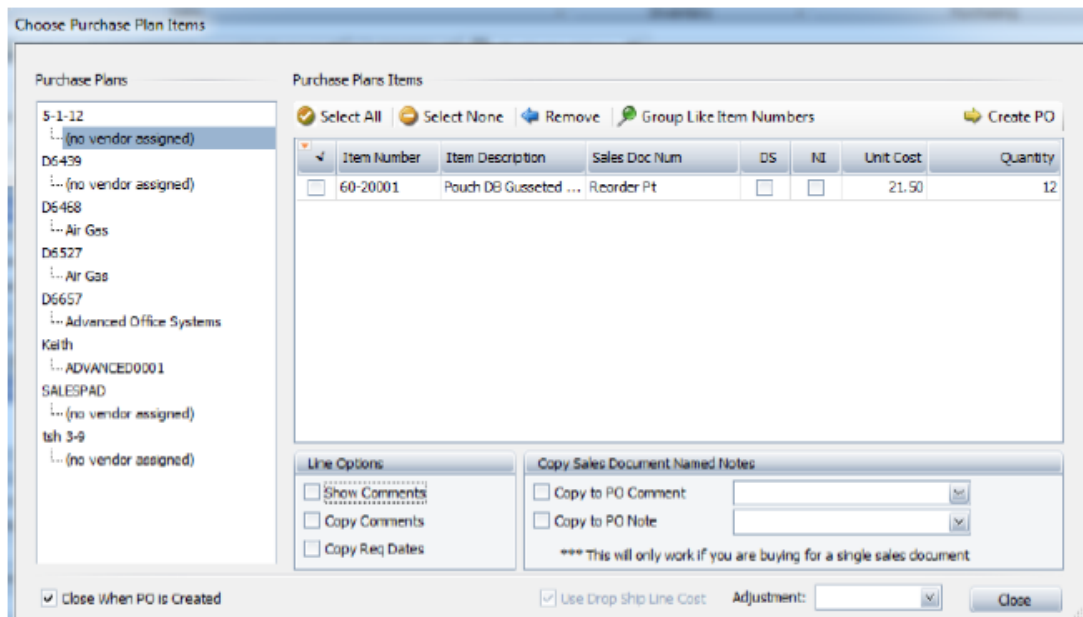
Select the Purchasing Advisor module in SalesPad (Modules>Purchasing Advisor). You can use this module to create purchase plans and generate purchase orders for selected vendors.

For more information on using this module, click [here](#).



After completing purchase selections or item planning, you can click the **Purchase** button (indicated by the green arrow) in the upper right-hand corner of the screen.

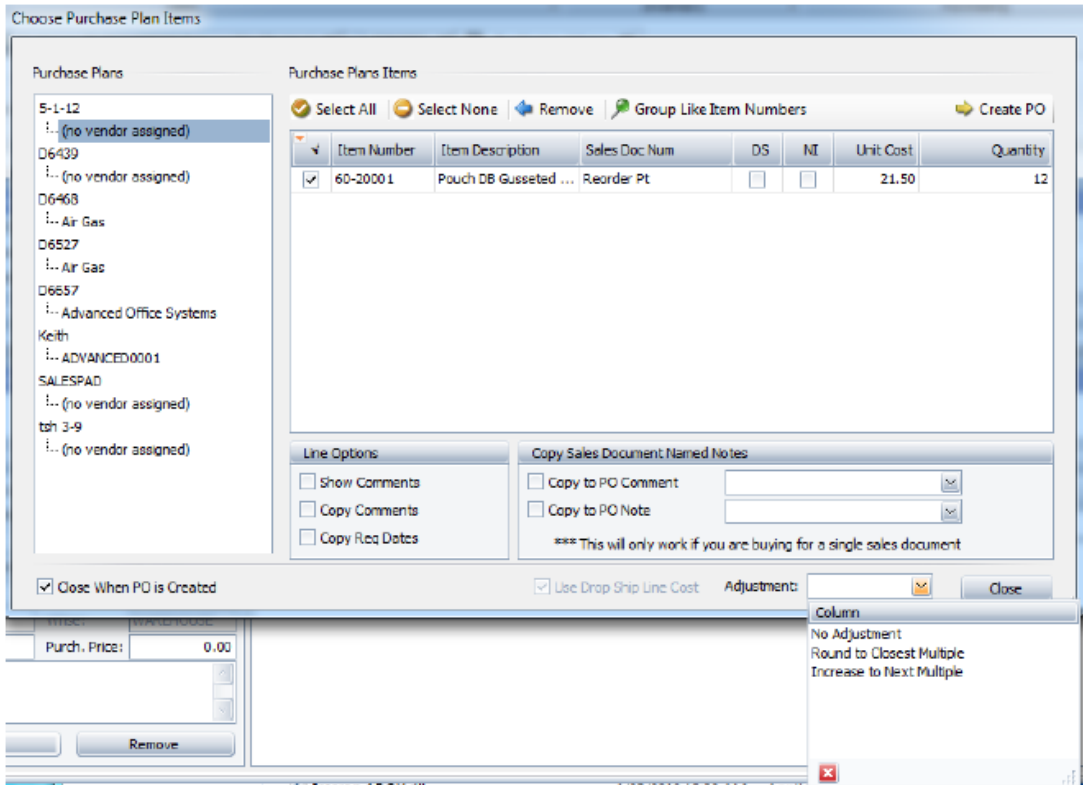
The "Choose Purchase Plan Items" screen pops up, displaying all available purchase plans.



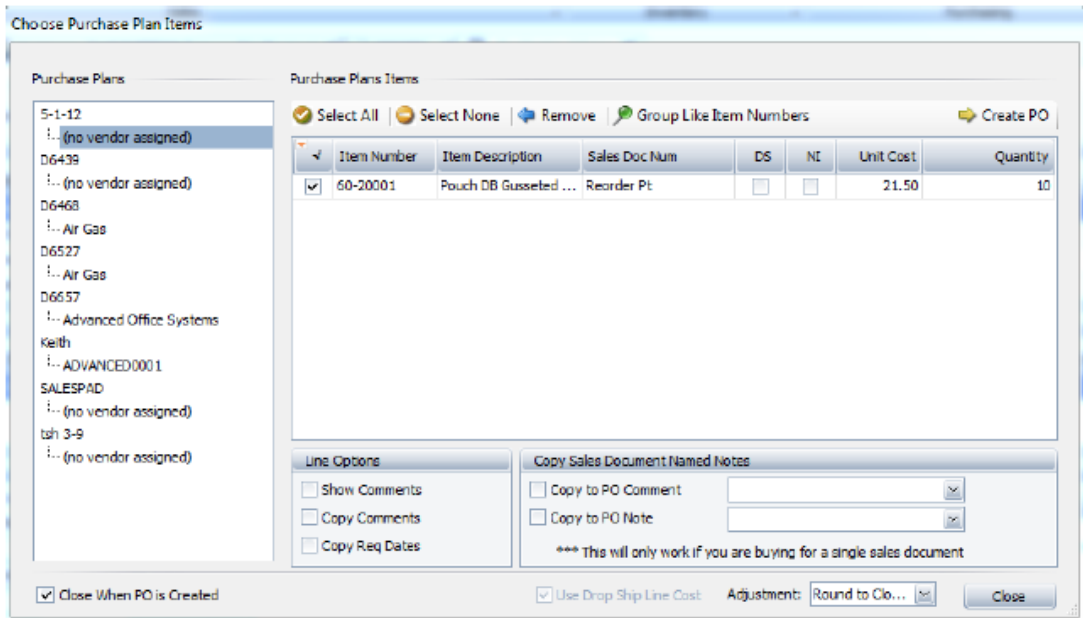
In the lower right corner of the screen (to the left of the **Close** button) is an **Adjustment** dropdown, which you can use to choose from three rounding options for the vendor minimum purchase quantity.

Clicking on the arrow on the **Adjustment** dropdown displays three options. Selecting **No Adjustment** will not affect the purchase quantity. If you choose **Round to Closest Multiple**, the purchase quantity will be set to the nearest minimum required quantity. If you choose **Increase to Next Multiple**, the purchase quantity will increase to the next minimum required quantity.

(The quantity adjustment is in addition to any other vendor minimum that might apply.)



As an example, choose a quantity of 10 for the item and select **Round to Closest Multiple**.



When you create the purchase order, the quantity is automatically rounded up to 12.

(STANDARD)

Close Save Print Copy Cancel Dynamics GP

<b>PO Properties</b> Purch. Order #: <input type="text"/> PO Status: <input type="text" value="New"/> PO Type: <input type="text" value="STANDARD"/> Vendor ID: <input type="text"/> Vendor Name: <input type="text"/> Currency: <input type="text"/>		<b>PO Dates</b> PO Date: <input type="text" value="10/11"/> Required Date: <input type="text" value="10/11"/> Promised Date: <input type="text" value="10/11"/> Promised Ship: <input type="text" value="10/11"/>		<b>Other</b> Terms: <input type="text"/> Shipping Method: <input type="text"/> Buyer: <input type="text"/> Confirm With: <input type="text"/> Revision Number: <input type="text" value="0"/> Location: <input type="text"/>		<b>Ship To Address</b> <input type="checkbox"/> Ship to Customer <input type="button" value="Edit Address"/> Fabrikam, Inc. Todd McFee 4277 West Oak Parkway Chicago, IL 60601-4277 P:(312) 436-2671 F:(312) 436-2896		<b>Totals</b> Discount: <input type="text" value="0.00"/> Freight: <input type="text" value="0.00"/> Misc. Charge: <input type="text" value="0.00"/> Tax: <input type="text" value="0.00"/> Total: <input type="text" value="258.00"/>	
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Line Items Notes Addresses User Fields Links Quick Report Audit Receipts Email Audit

Details

New Cancel Insert Update Missing Vendor Items

Item #	Description	UOM	Vendor Item #	Qty	UOM	Unit Cost	Extd. Cost	Location	Req. Date	Prom. Date	Prom. Ship	Comment
60-20001	Pouch DE Gusseted oatmeal - ...			12	Each	21.50	258.00	WAREHOUSE	10/11/2013	10/11/2013	10/11/2013	

258.00