Choose Purchase Plan: Purchase Quantity Rounding

Megan De Freitas - 2024-11-22 - Purchasing

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.
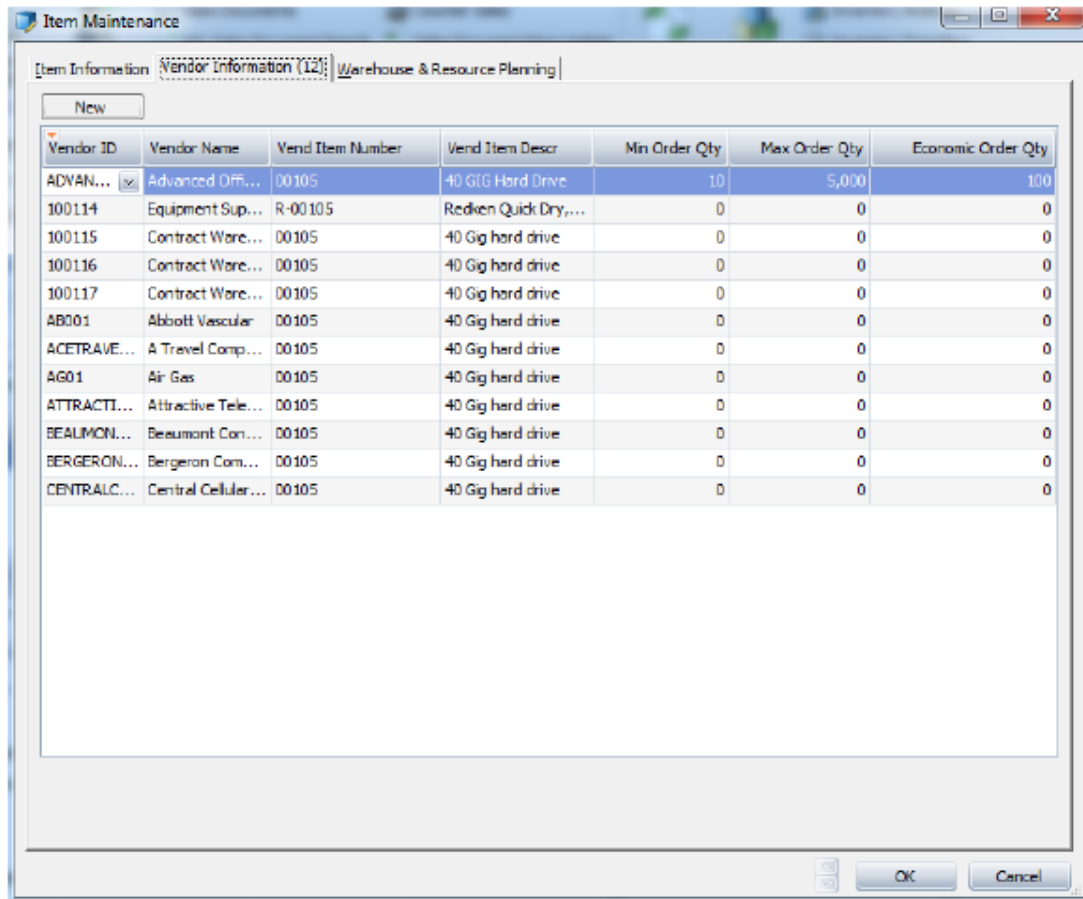

Setting the Multiple Value

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 Maintenace 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

PO Properties

Purch. Order #:	
PO Status:	New
PO Type:	STANDARD
Vendor ID:	
Vendor Name:	
Currency:	

PO Dates

PO Date:	10/11/
Required Date:	10/11/
Promised Date:	10/11/
Promised Ship:	10/11/

Other

Terms:	
Shipping Method:	
Buyer:	
Confirm With:	
Revision Number:	0
Location:	

Ship To Address

☐ Ship to Customer | Edit Address

Fabrikam, Inc.
Todd McFee
4277 West Oak Parkway
Chicago, IL 60601-4277
P:(312) 436-2671
F:(312) 436-2896

Totals

Discount:	0.00
Freight:	0.00
Misc. Charge:	0.00
Tax:	0.00
Total:	258.00

Line Items | Notes | Addresses | User Fields | Links | Quick Report | Audit | Receipts | Email Audit

Details

New | Cancel | Insert | | Update Missing Vendor Items

Item #	Description	NI	Vendor Item#	Qty	UOfM	Unit Cost	Extd. Cost	Location	Req. Date	Prom. Date	Prom. Ship	Comment
60-20001	Pouch DB Gusseted Oatmeal - ...	☐		12	Each	21.50	258.00	WAREHOUSE	10/11/2013	10/11/2013	10/11/2013	

258.00