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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.

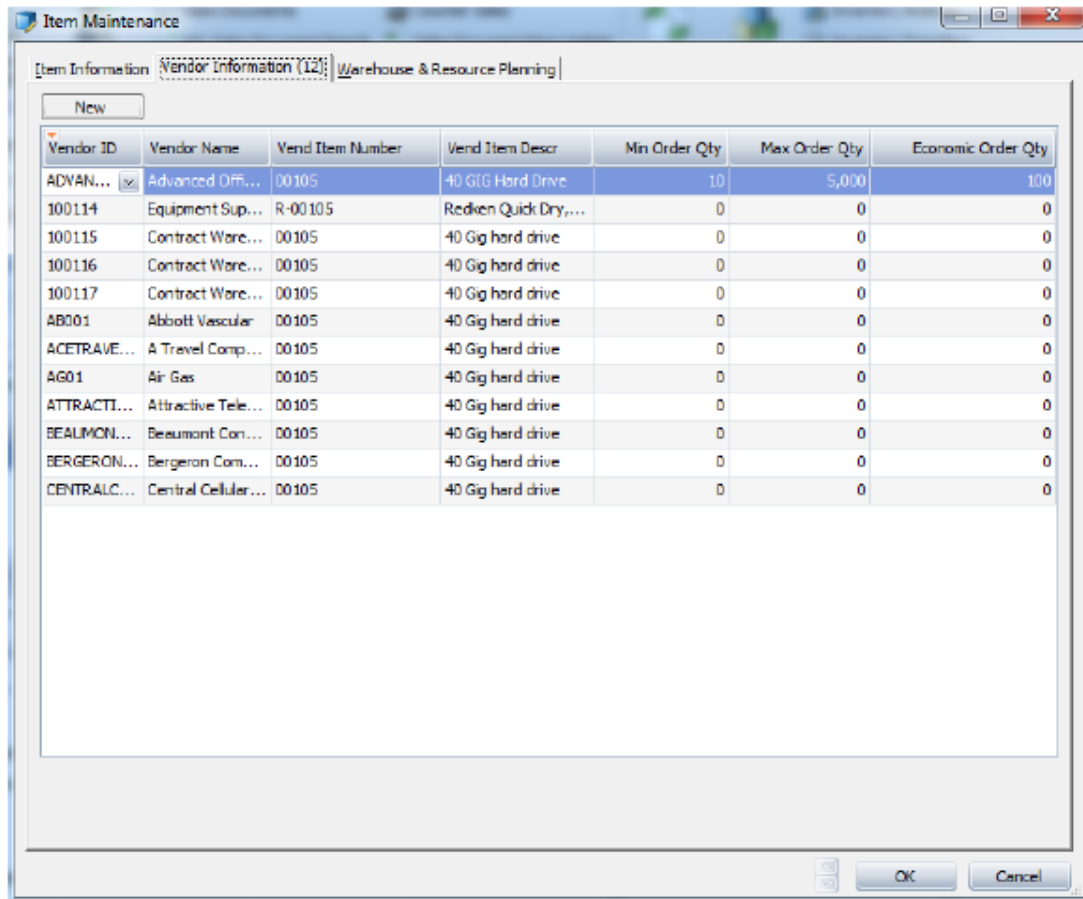
The screenshot displays the 'Security' editor window. At the top, there are buttons for 'Select All', 'Select None', and 'Copy From...'. Below this is a table with columns 'Acc...' and 'Name'. The first row is 'Choose Purchase Plan*' with a checked checkbox. A filter bar below the table shows 'Contains([Name], 'Choose Purchase Plan')' with an 'Edit Filter' button. The 'Misc' section is expanded, showing a table with two rows: 'Lock Line Item Order' with value 'False', and 'Show Rounding Options' with value 'True'. At the bottom, a text box titled 'Show Rounding Options' explains the functionality: '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.



The screenshot shows the 'Item Maintenance' window with the 'Vendor Information (12)' tab selected. The window contains a table with the following data:

Vendor ID	Vendor Name	Vend Item Number	Vend Item Descr	Min Order Qty	Max Order Qty	Economic Order Qty
ADVAN...	Advanced Off...	00105	40 GIG Hard Drive	10	5,000	100
100114	Equipment Sup...	R-00105	Redken Quick Dry...	0	0	0
100115	Contract Ware...	00105	40 Gig hard drive	0	0	0
100116	Contract Ware...	00105	40 Gig hard drive	0	0	0
100117	Contract Ware...	00105	40 Gig hard drive	0	0	0
AB001	Abbott Vascular	00105	40 Gig hard drive	0	0	0
ACETRAVE...	A Travel Comp...	00105	40 Gig hard drive	0	0	0
AG01	Air Gas	00105	40 Gig hard drive	0	0	0
ATTRACTI...	Attractive Tele...	00105	40 Gig hard drive	0	0	0
BEALMON...	Beaumont Con...	00105	40 Gig hard drive	0	0	0
BERGERON...	Bergeron Com...	00105	40 Gig hard drive	0	0	0
CENTRALC...	Central Cellular...	00105	40 Gig hard drive	0	0	0

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](#).

Purchasing Advisor - BEN - SalesPad

Close Refresh Setup Order Plant Remove All Plans

By Location ☒ Include Reorder Pt. Demand ☒ Include Sales Demand ☒ Show Demand Summary ☐ Show Purchase Plan Holds Purchase By: Quantity Needed

Item Number	Description	Class	Site	Min Req Date	Qty Needed	NI	Qty On Hand	Purchasing Unit	Qty Allocated	Qty Available	Qty On PO	Current Cost
00109	Rudon Ray...	RETAIL		9/20/2012	1		0		0	0	144	4.50
13820002	Fuel Gel-Citro...	RETAIL		11/1/2010	101		0		0	0	100	0.00
825-VH4-LN	Carneo Kodis...	RETAIL			310		240 Each		50	190	0	12.12
A100	Audio System	RETAIL		12/7/2010	103		1,525 Each		1,522	103	6,915	12.00

Primary Vendor	Item	Site	Cl	Belc	Docu	Doc	Req	Sales	Qty	Purch	Unit Cost	Unit P	Purch Plan	DS	NI	Item	Gener	Qty B	Qty O	Order	Comment	
00109	WARE...			SAOK...	05635	9/20/...	9/20/...	GREG E.	1	1	4.50	0.00					Redite...	HS	1	144	0	

Notes - 00109

Created By Create... 0 Item Number Vendor Notes

Click here to add a new row

Item: 00109

Item Desc: Redite Rewind Styling Gel, 5 oz

Purch. Qty: 1 UOM: EACH

Purch. Plan: Warehouse

Vendor: Purch. Price: 0.00

Comment:

Apply Remove

Purchase

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.

Choose Purchase Plan Items

Purchase Plans

5-1-12
... (no vendor assigned)
D6439
... (no vendor assigned)
D6468
... Air Gas
D6527
... Air Gas
D6657
... Advanced Office Systems
Keith
... ADVANCED0001
SALESPAD
... (no vendor assigned)
tsh 3-9
... (no vendor assigned)

Purchase Plans Items

Select All Select None Remove Group Like Item Numbers Create PO

Item Number	Item Description	Sales Doc Num	DS	NI	Unit Cost	Quantity
60-20001	Pouch DB Gusseted ...	Reorder Pt			21.50	12

Line Options

☐ Show Comments
☐ Copy Comments
☐ Copy Req Dates

Copy Sales Document Named Notes

☐ Copy to PO Comment
☐ Copy to PO Note

*** This will only work if you are buying for a single sales document

☒ Close When PO is Created ☒ Use Drop Ship Line Cost Adjustment: Close

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.)

Choose Purchase Plan Items

Purchase Plans

- 5-1-12
- ... (no vendor assigned)
- D6439
- ... (no vendor assigned)
- D6468
- ... Air Gas
- D6527
- ... Air Gas
- D6657
- ... Advanced Office Systems
- Keith
- ... ADVANCED0001
- SALESPAD
- ... (no vendor assigned)
- tsh 3-9
- ... (no vendor assigned)

Purchase Plans Items

Select All Select None Remove Group Like Item Numbers Create PO

Item Number	Item Description	Sales Doc Num	DS	NI	Unit Cost	Quantity
60-20001	Pouch DB Gusseted ...	Reorder Pt			21.50	12

Line Options

- Show Comments
- Copy Comments
- Copy Req Dates

Copy Sales Document Named Notes

- Copy to PO Comment
- Copy to PO Note

*** This will only work if you are buying for a single sales document

Close When PO is Created Use Drop Ship Line Cost Adjustments: Round to Closest Multiple

Column

- No Adjustment
- Round to Closest Multiple
- Increase to Next Multiple

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

Choose Purchase Plan Items

Purchase Plans

- 5-1-12
- ... (no vendor assigned)
- D6439
- ... (no vendor assigned)
- D6468
- ... Air Gas
- D6527
- ... Air Gas
- D6657
- ... Advanced Office Systems
- Keith
- ... ADVANCED0001
- SALESPAD
- ... (no vendor assigned)
- tsh 3-9
- ... (no vendor assigned)

Purchase Plans Items

Select All Select None Remove Group Like Item Numbers Create PO

Item Number	Item Description	Sales Doc Num	DS	NI	Unit Cost	Quantity
60-20001	Pouch DB Gusseted ...	Reorder Pt			21.50	10

Line Options

- Show Comments
- Copy Comments
- Copy Req Dates

Copy Sales Document Named Notes

- Copy to PO Comment
- Copy to PO Note

*** This will only work if you are buying for a single sales document

Close When PO is Created Use Drop Ship Line Cost Adjustments: Round to Closest Multiple

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

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) 436-2871
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	UOM	Qty	Unit Cost	Ext'd. Cost	Location	Req. Date	Prom. Date	Prom. Ship	Comment
60-20001	Pouch DB Gusseted Gatinel - ...	Each	12	21.50	258.00	WAREHOUSE	10/11/2013	10/11/2013	10/11/2013	

258.00