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# Purchasing Advisor

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## Overview

The Purchasing Advisor allows users to view demand throughout the system, create purchase plans, and generate purchase orders. Demand can be viewed either from backordered items on sales documents (Sales Demand) or from inventory items with quantity below a set reorder point (Reorder Point Demand).

**Note:** Purchasing Advisor will not show backordered items if you are using Back Order Docs setup in Dynamics GP. You must use backorder balance on sales orders.

**Note:** Items must have a default unit of measure set in Dynamics GP Purchasing. To set a unit of measure, open Item Maintenance in GP (Cards > Inventory > Item), then click **Go To O** and select Purchasing. Select a unit of measure from the Default Purchasing U of M field:

The screenshot displays the 'Item Purchasing Options Maintenance' window for item 'HD-20' (20 Gig Hard Drive). The 'Base U of M' is set to 'Each'. The 'Default Purchasing U of M' is also set to 'Each' and is highlighted with a red box. Below these fields is a table with two columns: 'U of M' and 'Purchasing Option'. The table contains two rows: 'Each' with 'Whole' and 'Case' with 'Whole'. At the bottom, there are checkboxes for 'Revalue Inventory for Cost Variance' (checked) and 'Quantity Tolerance Percentage' (unchecked), along with a 'Tolerance Percentage' field set to '0.000%'. The 'Shortage' and 'Overage' checkboxes are also unchecked, with their respective tolerance percentages set to '0.000%'.

U of M	Purchasing Option
Each	Whole
Case	Whole

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## Usage

## Demand Summary

Purchasing Advisor

Close Search Setup Create All Vendor Plans Remove All Plans By Location Show Demand Summary Show Purchase Plan Holds Include Sales Demand Purchase

Locations: Order: Plan: Purchase By: Quantity Needed

Item Number: Item Class:

Item Number	Description	Class	Site	Min Req Date	Qty Needed	NI	Qty On Hand	Purchasing UoM	Qty Allocated	Qty Available	Qty On PO	Current Cost
^XTESTKIT	Item for testin...			2/13/2018	20	<input checked="" type="checkbox"/>	0		0	0	0	0.00
1-A3261A	Multi-Core Pro...	SERVERS-1			4	<input type="checkbox"/>	0		2	-2	0	16,000.00
100XLG	Green Phone			1/22/2018	1	<input type="checkbox"/>	30	Each	6	24	0	28.46
128 SDRAM	128 meg SDRAM			4/12/2017	41	<input type="checkbox"/>	51,671	Each	33	51,638	0	152.10
24X IDE	24x CD-RQM			4/12/2017	1	<input type="checkbox"/>	10	Each	10	0	0	45.00

Demand Detail

Customer ...	Custom...	Primary V...	Item Nu...	Site	Cl...	Batc...	Docum...	Doc ...	Req ...	Sales ...	Qty Ne...	Purchas...	Unit ...	Unit ...	Purch ...	DS	NI	Item Description	Qty Backo...	Qty On ...	Order Point ...
Aaron Fitz ...	AARON...		^XTEST...	NORTH		NEW	ORDST...	2/13/...	2/13/...	PAUL...	10	10	0.00	1,00...		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Item for testin...	0	0	
Aaron Fitz ...	AARON...		^XTEST...	WARE...		NEW	ORDST...	2/13/...	2/13/...	PAUL...	10	10	0.00	100.00		<input type="checkbox"/>	<input checked="" type="checkbox"/>	Item for testin...	0	0	

Purchase Advisor Details

Apply Remove Use Sales Line Comment Assign Default Vendor Assign Line Vendor

Item: ^XTESTKIT

Item Descr: Item for testing kit stuff

Purch. Qty: 10 UoM: Each

Purch. Plan: Whse: NORTH

Vendor: Purch. Price: 0.00

Comment:

The Demand Summary grid displays items with purchasing demand. Select an item and its details will appear in the Demand Detail grid (if Show Demand Summary is selected). If items you are looking for do not appear on the grid, check that you have the required queue selected in Setup.

Purchasing Advisor

Close Search Setup Create All Vendor Plans Remove All Plans

Locations: Purchasing Setup

Item Number:

Queues Vendors

ID	Total	Count
<input checked="" type="checkbox"/> STDQTE QUOTE		
<input checked="" type="checkbox"/> STDQTE QUOTE DEAD	34336.20000	3
<input checked="" type="checkbox"/> STDQTE QUOTE NEWQUOTE	0.00000	4
<input checked="" type="checkbox"/> STDORD ORDER		
<input checked="" type="checkbox"/> STDORD ORDER END	79.90000	2
<input checked="" type="checkbox"/> STDORD ORDER NEW	345962.91940	35
<input checked="" type="checkbox"/> STDORD ORDER RULE	3061.35000	5
<input checked="" type="checkbox"/> WMSORDER ORDER		
<input checked="" type="checkbox"/> WMSORDER ORDER NEWWMS	1648.73000	6

OK Cancel

You can also select the options that you would like to display on the grid along the top of the Purchasing Advisor.

☐ By Location ☒ Show Demand Summary ☐ Show Purchase Plan Holds ☒ Include Sales Demand ☒ Include Reorder Pt. Demand ☐ Show Inactive

If you use Include Reorder Pt Demand, select By Location as well, to ensure that items available for multiple warehouses are displayed. Since documents are not relevant for Reorder Point Demand, the Document # column will display Reorder Pt when this option is selected. In this view, Qty Needed is determined by the quantity of an item that would need to be purchased in order to reach the set reorder point (not the Order To level at this time). An item's reorder point is set on the Item Properties tab in Inventory Lookup.

Include Sales Demand will show items currently on backorder that are not already linked to a purchase order.

Show Demand Summary will display a second grid showing which orders and reorder points are linked to the highlighted item in the Demand Summary.

Demand Summary													
Item Number	Description	Class	Site	Min Req Date	Qty Needed	NI	Qty On Hand	Purchasing UoM	Qty Allocated	Qty Available	Qty On PO	Current Cost	
^XTESTKIT	Item for testing...			2/13/2018	20	<input checked="" type="checkbox"/>	0		0	0	0	0.00	
1A3261A	Multi-Core Proc...	SERVERS-1			4	<input type="checkbox"/>	0		2	-2	0	16,000.00	
1000UG	Green Phone			1/22/2018	1	<input type="checkbox"/>	30	Each	6	24	0	28.46	
128 SDRAM	128 meg SDRAM			4/12/2017	41	<input type="checkbox"/>	51,671	Each	33	51,638	0	152.10	
24x IDE	24x CD-ROM			4/12/2017	1	<input type="checkbox"/>	10	Each	10	0	0	45.00	

  

Demand Detail													
Customer N...	Customer #	Primary Ve...	Item Nu...	Site	Class	Batc...	Docu...	Doc D...	Req. ...	Sales ...	Qty Ne...	Purchase...	Unit P...
Aaron Fitz E...	AARONF...		^XTESTKIT	NORTH	NEW	ORDST2...	2/13/...	2/13/2...	PAUL W.		10	10	0.00
Aaron Fitz E...	AARONF...		^XTESTKIT	WARE...	NEW	ORDST2...	2/13/...	2/13/2...	PAUL W.		10	10	0.00

If Show Demand Summary is not selected, the Demand Detail grid will display all items individually, on all orders, without summarizing.

**Note:** The AMD (Average Monthly Demand in Purchase Unit of Measure) column displays a calculation of 6 months' worth of quantity sold of an item (from posted invoices), divided by 6 months. Newer versions also have an AMD In Base UoM column.

#### Purchase Advisor Details

The Purchase Advisor Details section (formerly known as the Purchase Planner) allows you to select multiple items to be purchased at one time.

Purchase Advisor Details		Purchase Advisor Item Notes	
<input checked="" type="checkbox"/> Apply <input checked="" type="checkbox"/> Remove <input type="checkbox"/> Use Sales Line Comment <input type="checkbox"/> Assign Default Vendor <input type="checkbox"/> Assign Line Vendor			
Item:	^XTESTKIT		
Item Descr:	Item for testing kit stuff		
Purch. Qty:	10	UoM:	Each
Purch. Plan:		Whse:	NORTH
Vendor:		Purch. Price:	0.00
Comment:			

To purchase, you must add items to a purchase plan. First, select all the items to be purchased on the plan. One way to do this is to add the Auto-Filter Row to the grid by selecting it from the orange triangle dropdown on the Demand Detail. Filter by item number and select all so that all needed quantities of the same items are purchased on one plan. To assign different items to different purchase plans, enter the plan name/number in the Purch. Plan field. Purchase Advisor pulls as much information as possible into the Purchase Advisor Details area by accessing item defaults. If the item has a default vendor, purchase price, comments, etc., these will be populated automatically (some can be turned off and on with the Purchase Advisor Details check boxes), but you may make any changes as needed.

You can add notes on an item by switching to the Purchase Advisor Item Notes. Item Notes made here can be seen on the Item Notes tab in Inventory Lookup.

**Note:** You must click **Apply** for the Purchase Plan to be assigned. The newly applied purchase plan will appear in the Purch Plan column on the data grid. To remove items from a plan, highlight the item, erase the name from the Purch Plan field in the Purchase Advisor Details section, and click **Remove**.

Once all purchase selections or item planning is complete, click the **Purchase** button in the upper right corner. This will open the Choose Purchase Plan Items screen, where all available purchase plans are displayed.

Purchase Plan ELECTRON0001 Total Cost: \$ 0.00

**Purchase Plans**  
ELECTRON0001  
**Electronic Services**  
HDs  
(no vendor assigned)

**Purchase Plans Items**  
☒ Select All   ☐ Select None         

<input checked="" type="checkbox"/>	Item Number	Item Description	Sales Doc Num	DS	NI	Unit Cost	Quantity	Extended ...
<input type="checkbox"/>	ACCS-CR...	Phone Cord - 12...	ORDST2229	<input type="checkbox"/>	<input type="checkbox"/>	3.29	1	3.29
<input type="checkbox"/>	ACCS-RST...	Shoulder Rest-D...	ORDST2229	<input type="checkbox"/>	<input type="checkbox"/>	4.55	1	4.55
<input type="checkbox"/>	ACCS-RST...	Shoulder Rest - ...	ORDST2229	<input type="checkbox"/>	<input type="checkbox"/>	4.55	2	9.10

**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

For our example, we will purchase all items under the ELECTRON0001 purchase plan. To do this, highlight the plan named PC on the left, the click **Select All** under Purchase Plans Items. When all options we want have been set, click **Create PO**, and the items are then created on a new purchase order document.

(STANDARD)

Close Save Print Copy Cancel Dynamics GP

**PO Properties**  
Purch. Order #:   
PO Status: New  
PO Type: STANDARD  
Vendor ID: ELECTRON0001  
Vendor Name: Electronic Services  
Currency: Z-C\$

**PO Dates**  
PO Date: 3/14/2  
Required Date: 3/14/2  
Promised Date: 3/14/2  
Promised Ship: 3/14/2

**Other**  
Terms: NET 30  
Shipping Method: MAIL  
Buyer:   
Confirm With:   
Revision Number: 0  
Location:   
☐ On Hold

**Ship To Address**  
☐ Ship to Customer Edit Address  
Kefkas Godlike Wares

**Totals**  
Discount: 0.00  
Freight: 0.00  
Misc. Charge: 0.00  
Tax: 0.00  
Total: 16.94

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

Details

New Cancel Insert Update Missing Vendor Items

Landed C...	Item #	Description	NI	Req. Date	Vendor Item#	UoM	Unit Cost	Extd. Cost	Location	Qty	PO Line St...	Prom. Date	Prom. Ship	Comment
	ACCS-...	Phone Cord...	<input type="checkbox"/>	3/14/2018	CORD12WH	Each	3.29	3.29	WAREHO...	1	New	3/14/2018	3/14/2018	
	ACCS-RS...	Shoulder R...	<input type="checkbox"/>	3/14/2018	SHLDRBK	Each	4.55	4.55	WAREHO...	1	New	3/14/2018	3/14/2018	
	ACCS-RS...	Shoulder R...	<input type="checkbox"/>	3/14/2018	SHLDRWH	Each	4.55	9.10	WAREHO...	2	New	3/14/2018	3/14/2018	

16.94

The PO has been created with a Standard Purchase Order doc type. Make any needed changes, then click **Save**. After the document is created, saved, and closed, you will be brought back to the Purchasing Advisor main window. The associated orders will be linked to each sales document.

### Security and Application Settings

*Purchasing Advisor* - General Security to allow access to the Purchasing Advisor Module.

*Choose Purchase Plan\** - Security to allow users to access the Choose Purchase Plan window.

*Purchasing Setup* - Security to allow users to select which workflow queues to pull sales demand information from. Enabling will allow for purchasing in the Purchasing Advisor and creating the SOP to POP link.

**Note:** Securities with an asterisk (such as Choose Purchase Plan) have sub-securities that are listed in the middle section of the Security field. Sub-security descriptions appear in the bottom section of the field. Review and customize these as desired.