

ORACLE NETSUITE

Supply Allocations Supply Planning Item 360

Gerry Dewil & Mike Farina
Solution Specialists
NetSuite



Clarifications



Hello Gerry,

We invite you to join the Rocky Mountain NetSuite User Group on **Wednesday, September 20, 2023 from 8:30am – 12:00pm**. Our **Online-Only** feature presentation will cover **Inventory Management**.

We are grateful to [LeaseQuery](#) - the SuiteApp sponsor for this meeting , and to [Myers-Holum](#), the consulting sponsor .

This meeting is focused on the Inventory Management functions in NetSuite. Gerry Dewil of Oracle will cover Supply Planning, Supply Allocation and Item 360. We will cover the functionality of these three products and learn how they supplement each other, allowing the user to have a 360 degree view of the supply chain. **These products are free SuiteApps that are available for download at no extra cost.**

Slight correction:

- Supply Allocations is a feature that is part of the Advanced Inventory Module
- Supply Planning is a feature that is part of the Demand Planning module
- Item 360 is a free SuiteApp

Agenda

- Supply Allocations
 - Introduction and principles
 - Allocation Strategies and Schedules
 - Sales Channel Allocations and Reservations
 - Optimization Methods
 - Earliest Item Availability
 - Demo
- Supply Planning
 - Planning Overview
 - Refresh Planning Repository
 - Planning Workbench
- Supply Allocations and Supply Planning
- Item 360

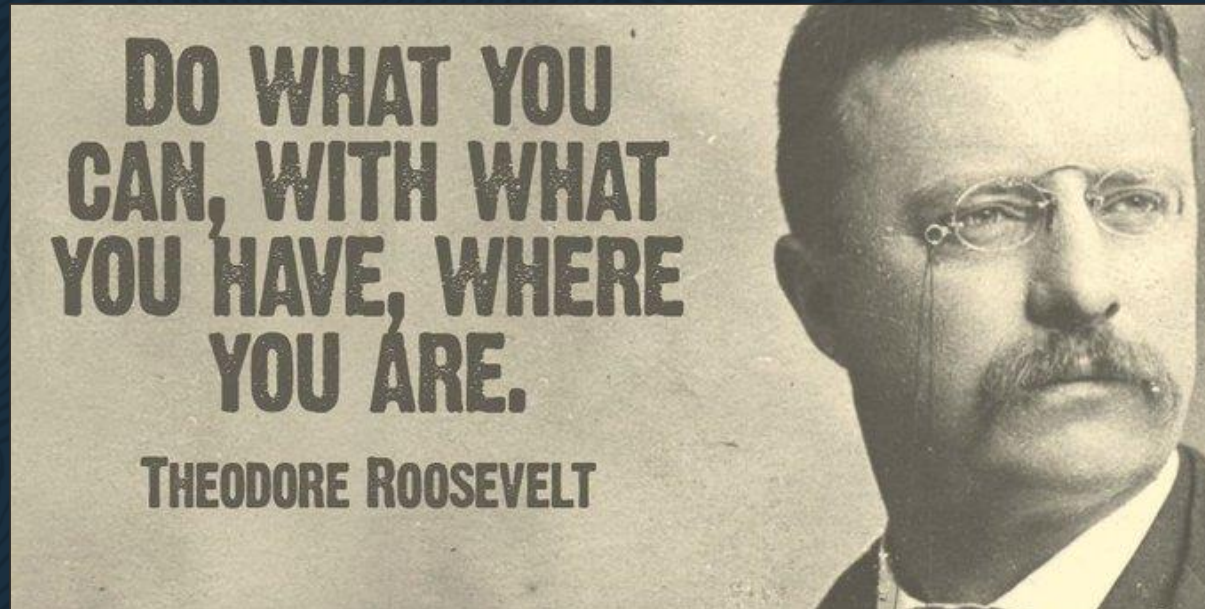


Gerry Dewil
Solution Specialist
Oracle NetSuite



Mike Farina
Solution Specialist
Oracle NetSuite

Supply Allocations



Supply Allocation

Prerequisites:

- Generally available since release 2019.2
- Inventory Cloud Service module license required
- Multi-location Inventory =ON

Setup

- Enable feature
- Define allocation strategies
- Set preferences
- Set-up Locations, Items and Inventory Statuses
- Customize transaction forms

User access:

- Item Commitment permission for the feature-specific pages
- Respective permissions for other records (Location, Item, Transactions. Preferences)
- Subsidiary and Location restrictions work as NS standard

The screenshot displays the 'Supply Allocation Setup' interface. At the top, there are 'Save', 'Cancel', and 'Reset' buttons. Below this is a navigation bar with 'Demand Preferences' (selected) and 'Supply Preferences'. The main content area is divided into two sections: 'Demand Transaction Sorting Options' and 'Allocation Timing'. In the 'Demand Transaction Sorting Options' section, there are three rows, each with a 'SORT BY' label, a dropdown menu, and a 'DESCENDING' checkbox. The first row has 'Supply Required By Date' selected in the dropdown and the checkbox is unchecked. The second row has 'Order No.' selected and the checkbox is unchecked. The third row has 'Expected Ship Date' selected and the checkbox is unchecked. The 'Allocation Timing' section has a checked checkbox labeled 'PERFORM SUPPLY ALLOCATION AFTER TRANSACTION ENTRY, UPDATE OR DELETE'. At the bottom, there are 'Save', 'Cancel', and 'Reset' buttons.

Location

“Make Inventory Available” check-box on the Location record to include in allocation calculations.

Location

[Edit](#) [Back](#) | [Search](#) | [Actions](#) ▾

LOCATION IS INACTIVE

NAME
US - Omaha

SUBLOCATION OF

SUBSIDIARY
Parent Company

LOCATION TYPE

TIME ZONE
(GMT-07:00) Mountain Time (US & Canada)

LATITUDE

LONGITUDE

DOCUMENT NUMBER PREFIX

LOGO

MAKE INVENTORY AVAILABLE

INCLUDE IN SUPPLY PLANNING

INCLUDE IN CONTROL TOWER

INTERNAL ID
9

[Address](#) [Document Numbers](#) [Workflow](#) [System Notes](#)

ADDRESS
US - Omaha
[United States Map](#)

RETURN ADDRESS

[Edit](#) [Back](#) | [Search](#) | [Actions](#) ▾

Item

- New fields on Item record to set per location:

–ATP Lead Time

–Quantity Allocated

The screenshot shows the NetSuite 'Locations' page for a vendor. At the top, there are filters for 'SUBSIDIARY' and 'LOCATION'. Below these are buttons for 'Add Location', 'Duplicate Multiple Locations', and 'Customize View'. A table lists three locations: US - Omaha, US - Atlanta, and US - San Mateo. The 'ATP LEAD TIME' column is highlighted with a red box, showing a value of 60 for each location. A 'VIEW' dropdown menu is also highlighted with a red box, set to 'Order Management'.

ACTION	DUPLICATE ▲	LOCATION	CURRENCY	ATP LEAD TIME
Edit	Duplicate	US - Omaha	US Dollar	60
Edit	Duplicate	US - Atlanta	US Dollar	60
Edit	Duplicate	US - San Mateo	US Dollar	60

The screenshot shows the NetSuite 'Locations' page for a vendor, displaying a different view. The 'VIEW' dropdown menu is highlighted with a red box and set to 'Inventory'. A table lists three locations: US - San Mateo, US - Omaha, and US - Atlanta. The 'QUANTITY ALLOCATED' column is highlighted with a red box, showing values of 40, 40, and 10 respectively. Other columns include 'QUANTITY ON HAND', 'VALUE', 'QUANTITY COMMITTED', 'QUANTITY AVAILABLE', and 'QUANTITY ON ORDER'.

ACTION	DUPLICATE ▲	LOCATION	CURRENCY	QUANTITY ON HAND	VALUE	QUANTITY ALLOCATED	QUANTITY COMMITTED	QUANTITY AVAILABLE	QUANTITY ON ORDER
Edit	Duplicate	US - San Mateo	US Dollar	10	350	40		10	
Edit	Duplicate	US - Omaha	US Dollar	90	3,150	40	40	50	80
Edit	Duplicate	US - Atlanta	US Dollar	10	350	10		10	

Inventory Status (if enabled)

Determine Inventory availability in granularity

- for each status
- for commitment
- for supply allocation
- for both

Inventory Status

NAME ^{*}

Incoming Insp

MAKE INVENTORY AVAILABLE FOR COMMITMENT

MAKE INVENTORY AVAILABLE FOR ALLOCATION

INACTIVE

DESCRIPTION

Hold area for incoming items that need to be inspected before being available as inventory

What Is Supply Allocation ?

NetSuite Supply Allocation Benefits



Commit
Inventory to
Demand Orders



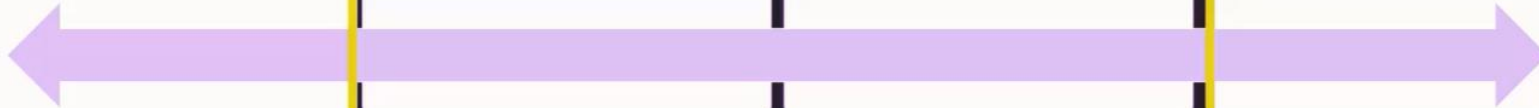
Allocate
Inventory from
future Supply
Orders



Be alerted when
an order line is
unsupported



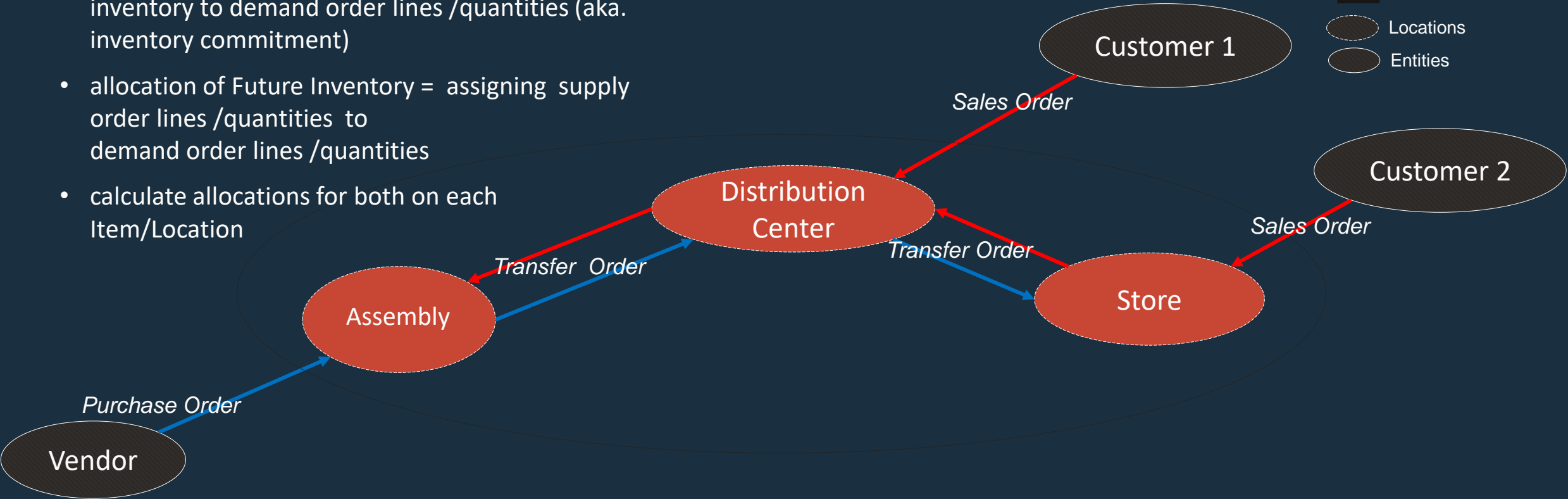
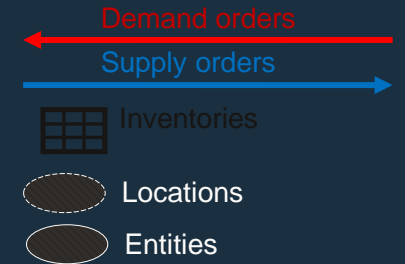
Automatically or
manually
reallocate
orders



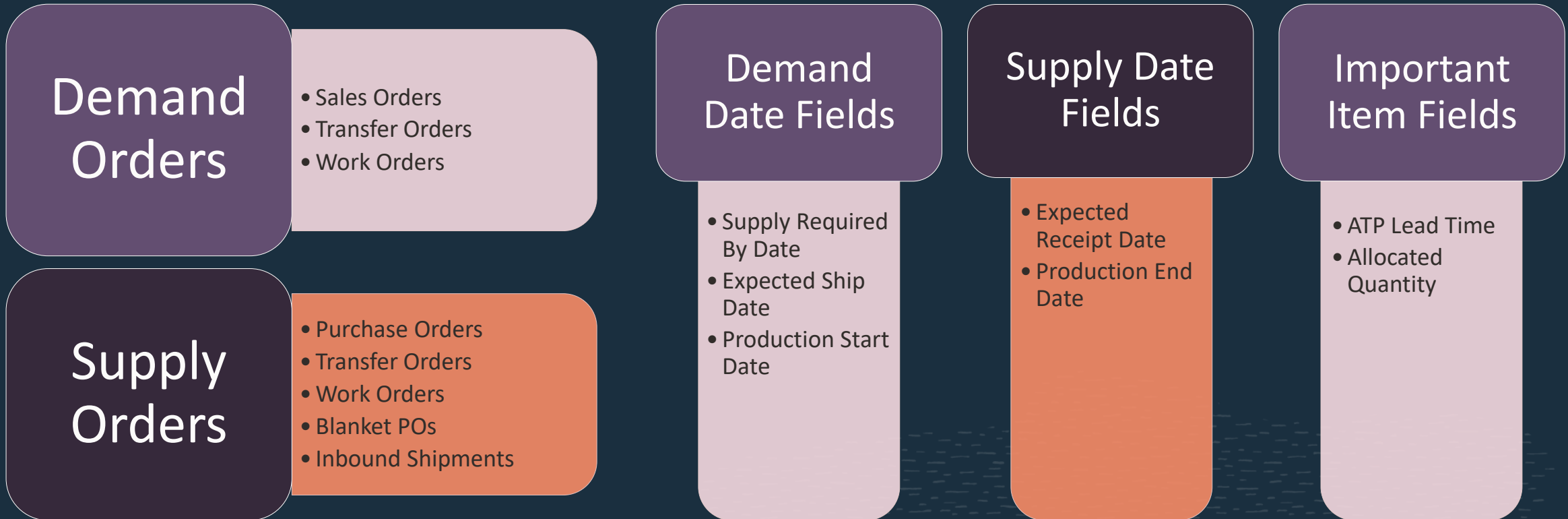
Supply Allocation principles

Matching demand orders to current and future inventory

- allocation of On-Hand Inventory = assigning inventory to demand order lines /quantities (aka. inventory commitment)
- allocation of Future Inventory = assigning supply order lines /quantities to demand order lines /quantities
- calculate allocations for both on each Item/Location



Supply Allocation Principles



Supply Allocation Principles

Timing

As Soon
As Possible

As Close
As Possible

Quantity

Available
Quantity

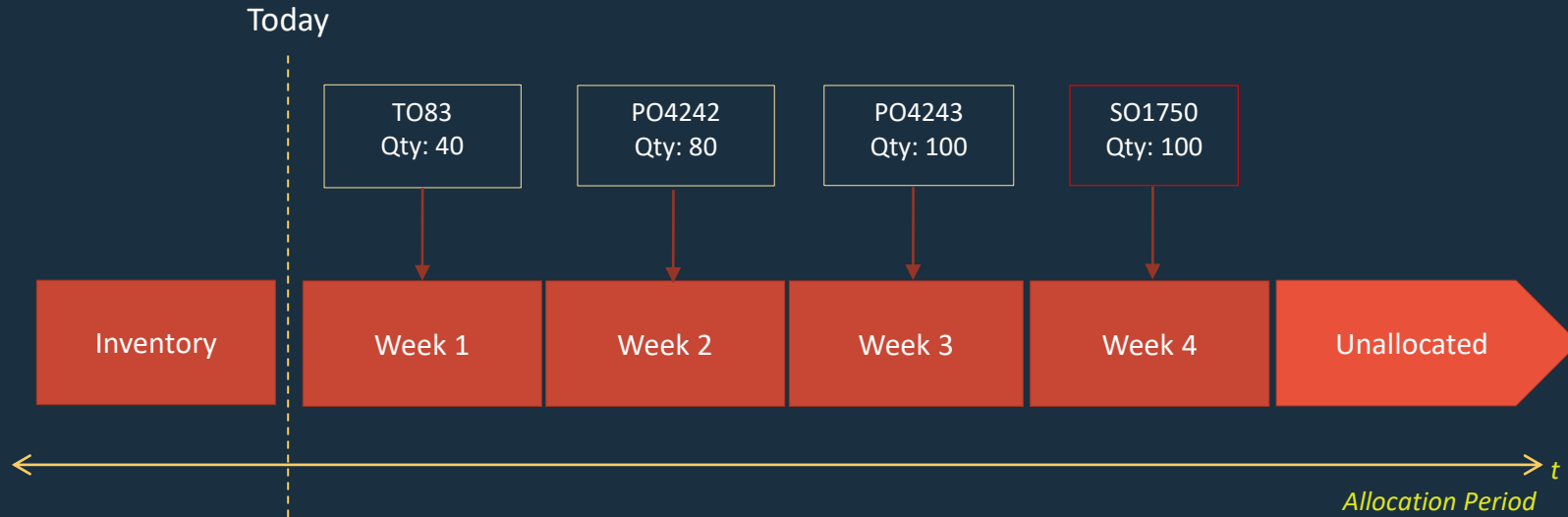
Complete
Quantity

Flexibility

Reserved
Allocation

Firm
Allocation

Allocation Strategies



Sep 2023						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

As Soon as Available + Available Quantity

#	ITEM #	SUPPLY TYPE	ORDER	ORDER STATUS	SOURCE	SUPPLY QUANTITY	SUPPLY RECEIPT DATE	ALLOCATED
1	NS-SA-E2	Purchase Order	PO4242	Pending Receipt	Crown Metal Works	80	09/12/2023	60
2	NS-SA-E2	Transfer Order	TO83	Pending Fulfillment	San Francisco	40	09/07/2023	40

As Soon as Available + Complete Quantity

ITEM	INVENTORY LOCATION	INVENTORY SUBSIDIARY	ORDER QUANTITY	UNITS	INVENTORY DETAIL	ORDER PRIORITY	SUPPLY REQUIRED BY DATE	EXPECTED SHIP DATE	DAYS LATE	ALLOCATED SUPPLY	AVAILABLE	COMMITTED
NS-SA-E2	San Francisco	United States	500	Ea			09/26/2023	12/18/2023	83	0	0	0

Example 2 Allocation Strategies

Closest + Available Quantity

#	ITEM #	SUPPLY TYPE	ORDER	ORDER STATUS	SOURCE	SUPPLY QUANTITY	SUPPLY RECEIPT DATE	ALLOCATED
1	NS-SA-E2	Purchase Order	PO4243	Pending Receipt	Crown Metal Works	100	09/19/2023	100

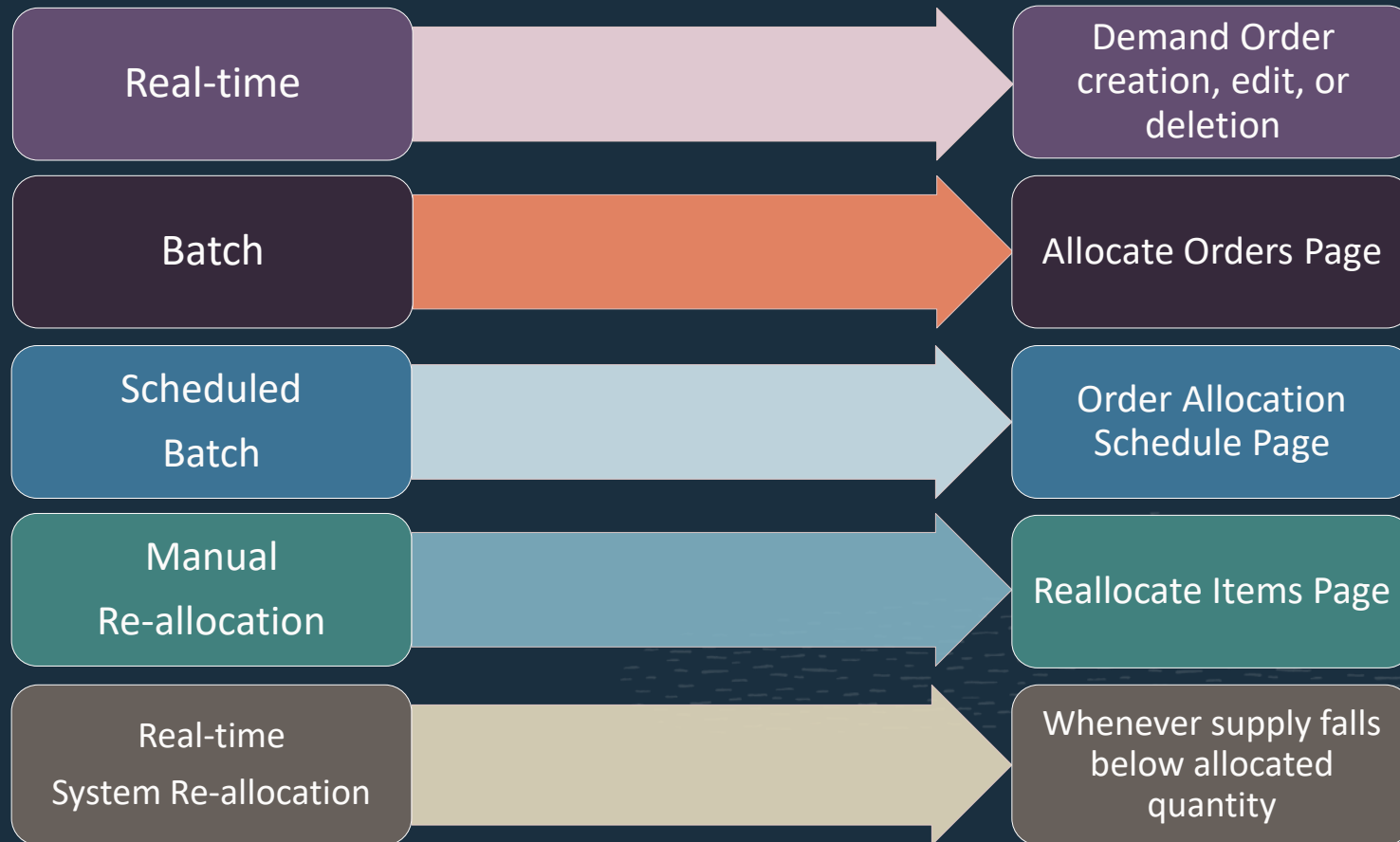
WO released with earlier SRBD

#	ITEM #	SUPPLY TYPE	ORDER	ORDER STATUS	SOURCE	SUPPLY QUANTITY	SUPPLY RECEIPT DATE	ALLOCATED
1	NS-SA-E2	Purchase Order	PO4242	Pending Receipt	Crown Metal Works	80	09/12/2023	80
2	NS-SA-E2	Purchase Order	PO4243	Pending Receipt	Crown Metal Works	100	09/19/2023	5
3	NS-SA-E2	Transfer Order	TO83	Pending Fulfillment	San Francisco	40	09/07/2023	15

WO785
Qty: 25

Supply Allocation Principles

Allocation triggers



Supply Allocation special cases

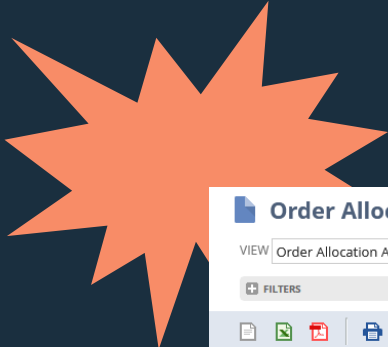
1. Drop-Ship Order: Supply Allocation does not deal with it
2. Special Order: Sales Order /Purchase Order link functions as a firm allocation
3. Arms-Length Intercompany Inventory Transfer
 - linked IC Sales Order /Purchase Order pair
 - For allocation those function as normal demand /supply orders
4. Intercompany Special Order : a combination of #2 and #3
5. Cross-subsidiary Fulfillment: allocation works with Location on Sales Order line

Supply Allocation Exceptions

Expected Ship Date/
Production End Date



Supply Required By Date



Order Allocation Alerts List Search

VIEW Order Allocation Alerts Customize View

FILTERS

11/06/2023 — 07/16/2023 ◀ ▶ TOTAL: 260

ORDER	ORDER LINE ALERTS	CUSTOMER	ORDER PRIORITY	SUBSIDIARY	SHIP COMPLETE	ORDER DATE	EARLIEST ALERT SUPPLY REQUIRED BY DATE	SALES CHANNEL
SO1586	1	223 Skivee Incorporated	6	Headquarters : United States	No	08/18/2023	11/06/2023	
SO1581	1	14 Vac Supplies Ltd.	5	Headquarters : United States	No	08/17/2023	11/05/2023	
SO1585	1	289 Supply Industries	4	Headquarters : United States	No	08/18/2023	11/04/2023	
SO1584	1	41 Dynabox LLC.	2	Headquarters : United States	No	08/18/2023	11/02/2023	
SO1582	1	12 Mobility Solutions	3	Headquarters : United States	No	08/18/2023	11/01/2023	
SO1748	1	200 Rodel Associates		Headquarters : United States	No	08/31/2023	10/31/2023	
SO1605	1	0 Smith Supplies Corp.	2	Headquarters : United States	No	08/26/2023	10/15/2023	Online Sales
SO561	1	0 Smith Supplies Corp.		Headquarters : United States	No	10/10/2023	10/10/2023	
SO1633	1	306 Webster Electric		Headquarters : United States	No	08/09/2023	10/10/2023	
SO1636	1	4 Twitterwire Industries		Headquarters : United States	No	08/09/2023	10/10/2023	
SO1639	1	4 Twitterwire Industries		Headquarters : United States	No	08/09/2023	10/10/2023	
SO1573	1	0 Smith Supplies Corp.	1	Headquarters : United States	No	08/13/2023	10/08/2023	
SO1634	1	32 Dazzlesphere Company	2	Headquarters : United States	No	08/09/2023	10/05/2023	Online Sales
SO1635	1	358 The Paul Group		Headquarters : United States	No	08/09/2023	10/05/2023	
SO1637	1	32 Dazzlesphere Company	1	Headquarters : United States	No	08/09/2023	10/05/2023	OEMs
SO1638	1	358 The Paul Group		Headquarters : United States	No	08/09/2023	10/05/2023	
SO1574	1	0 Smith Supplies Corp.	1	Headquarters : United States	No	08/13/2023	10/02/2023	
SO1610	1	305 Warwick Lumber		Headquarters : United States	No	08/06/2023	10/02/2023	
SO1575	1	0 Smith Supplies Corp.	1	Headquarters : United States	No	08/13/2023	10/01/2023	
SO1576	1	0 Smith Supplies Corp.	1	Headquarters : United States	No	08/13/2023	10/01/2023	
SO1572	1	0 Smith Supplies Corp.	1	Headquarters : United States	No	08/06/2023	09/17/2023	

Sales Order – Allocated Supply

Sales Order SO1750 0 Smith Supplies Corp. **PENDING FULFILLMENT**

Buttons: Edit, Back, Fulfill, Close Order, Actions

Primary Information

ORDER # SO1750 DATE 08/01/2023 SO RESOLUTION
 CUSTOMER 0 Smith Supplies Corp. PO # EXCLUDE COMMISSIONS
 PROJECT

Classification

SUBSIDIARY United States
 DEPARTMENT

Sales Information

SALES REP Burt Brocus
 PAIRED INTERCOMPANY TRANSACTION EXCLUDE FROM ELECTRONIC BANK PAYMENTS PROCESSING
 INTERCOMPANY STATUS

Summary

SUBTOTAL	6,560.00
UNIT ITEM	
TOTAL	0.00
ING COST	
ING COST	
	6,560.00

Allocated Supply: NS-SA-E2

VIEW: Default Allocated Supply

Customize View

#	ITEM	SUPPLY TYPE	ORDER	ORDER STATUS	SOURCE	SUPPLY QUANTITY	SUPPLY RECEIPT DATE	ALLOCATED	DAYS LATE	SALES CHANNEL	ORDER RESERVATION	ORDER RESERVATION NUMBER
1	NS-SA-E2	Purchase Order	PO4242	Pending Receipt	Crown Metal Works	80	09/12/2023	60				
2	NS-SA-E2	Transfer Order	TO83	Pending Fulfillment	San Francisco	40	09/07/2023	40				

Items Promotions Shipping Billing Accounting Relationships Communication Related Records System Information

ALLOW CROSS-SUBSIDIARY FULFILLMENT
 ENABLE ITEM LINE SHIPPING

ITEM	INVENTORY LOCATION	INVENTORY SUBSIDIARY	ORDER QUANTITY	UNITS	INVENTORY DETAIL	ORDER PRIORITY	SUPPLY REQUIRED BY DATE	EXPECTED SHIP DATE	DAYS LATE	ALLOCATED SUPPLY	AVAILABLE	COMMITTED	BACK ORDERED	COMMITMENT CONFIRMED	REALLOCATE ORDER ITEM	ALLOCATION STRATEGY	PICKED	PACKED	FULFILLED	INVOICED	PRICE LEVEL
NS-SA-E2	San Francisco	United States	100	Ea			09/26/2023	09/26/2023		100	0	0	100			ASAA- Available-Reserved	0	0	0	0	Jobber (-20%)

Transfer Order (Allocated Supply and Allocated Demand)

Transfer Order TO83 PENDING FULFILLMENT

Edit Back Close Order

Primary Information

ORDER # TO83
 DATE 08/01/2023
 SUBSIDIARY United States
 ORDER TYPE
 FROM LOCATION Boston
 TO LOCATION San Francisco

Classification

DEPARTMENT CLASS
 MFG PROJECT MFG PROJECT TASK

Summary

SHIPPING COST	1,800.00
HANDLING COST	117.47
TOTAL	1,917.47

Allocated Supply: NS-SA-E2

VIEW: Default Allocated Supply

Customize View

#	ITEM	SUPPLY TYPE	ORDER	ORDER STATUS	SOURCE	SUPPLY QUANTITY	SUPPLY RECEIPT DATE	ALLOCATED	DAYS LATE	SALES CHANNEL	ORDER RESERVATION	ORDER RESERVATION NUMBER
1	NS-SA-E2	Inventory for Commitment and Allocation	Inventory		Boston	40		40				

Allocated Demand: NS-SA-E2

VIEW: Default Allocated Demand

Customize View

#	DEMAND TYPE	ORDER	CUSTOMER	ORDER STATUS	ALLOCATED	SUPPLY REQUIRED BY DATE	SUPPLY DAYS LATE	DEMAND DAYS LATE	REALLOCATE ORDER ITEM	SALES CHANNEL	ORDER RESERVATION	OF
1	Sales Order	SO1750	0	Pending Fulfillment	40	09/26/2023						

Items Shipping Communication Related Records System Information Custom

ITEM	ALLOCATED SUPPLY	COMMITTED	PICKED	PACKED	FULFILLED	ALLOCATED DEMAND	RECEIVED	BACK ORDERED	QUANTITY	UNITS	TRANSFER PRICE	AMOUNT	DESCRIPTION	INVENTORY DETAIL	REQUIRED BY DATE	SHIP DATE	REALLOCATE ORDER ITEM	DAYS LATE	RECEIVED DATE
NS-SA-E2 SA Example 2 - Allocation Strategies	40	40	0	0	0	40	0	0	40	Ea	45.00	1,800.00	Supply Allocation Example 2 with various Allocation Strategies		09/05/2023	09/05/2023			09/07

Work Order – Allocated Supply and Demand

Work Order WO785 PLANNED

Edit Back Close Print BOM Actions

Primary Information

ORDER # WO785	QUANTITY 5	PROJECT
DATE 08/01/2023	UNITS Each(1)	NUMBER OF BATCHES 0
SUBSIDIARY United States	<input type="checkbox"/> WIP	BUILDABLE 0
LOCATION San Francisco	BILL OF MATERIALS NS-SA-E2-Assembly	BUILT 0
ASSEMBLY NS-SA-E2-Assembly Assembly Item for Supply Allocations - Example 2	BILL OF MATERIALS REVISION Rev1	<input type="checkbox"/> AUTO-CALCULATE LAG
<input type="checkbox"/> MARK SUB-ASSEMBLIES PHANTOM	MANUFACTURING ROUTING	STATUS Planned
	CUSTOMER	<input type="checkbox"/> FIRMED
		WORK CENTER MM-SF Cut-to-Size
		WO RESOLUTION

Production Information

MEMO	SUPPLY REQUIRED BY DATE 09/25/2023	METHOD SHEET
ALLOCATED DEMAND 2		

Scheduling Details

PRODUCTION START DATE 09/25/2023	ACTUAL PRODUCTION END DATE	SCHEDULING ATTRIBUTE 3
PRODUCTION END DATE 09/25/2023	<input type="checkbox"/> ENTER MANUALLY	SCHEDULING ATTRIBUTE 2
ACTUAL PRODUCTION START DATE	SCHEDULING METHOD	SCHEDULE SEQUENCE
<input type="checkbox"/> ENTER MANUALLY	SCHEDULING ATTRIBUTE 1	

Classification

DEPARTMENT	CLASS
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Items Manufacturing Jobs Advanced Manufacturing Related Records Inspection System Information Outsourcing Custom Work Order Analysis Communication NS,WMS Production Data Demo Reference Sales Team Work Queue Timers

Items • AM Work Order Product

ITEM	OPERATION	DAYS LATE	COMMITTED	USED IN BUILD	ALLOCATED SUPPLY	BACK ORDERED	AVAILABLE	AVERAGE COST	LAST PURCHASE PRICE	ON HAND	COMPONENT YIELD	BOM QUANTITY	QUANTITY	UNITS	INVENTORY DETAIL	EXPECTED SUPPLY DATE	DESCRIPTION	COMMITMENT CONFIRMED	ORDER PRIORITY	REALLOCATE ORDER ITEM	OPTIONS	ITEM SOURCE	TRANSACTION	PLANNING COMP ISSUE
NS-SA-E2 SA Example 2 - Allocation Strategies		84	0	0	0		0			0			25	Ea		12/18/2023	Supply Allocation Example 2 with various Allocation Strategies					Stock	09/25/12:00 a	
COM001 Component Item		84	0	0	0		1,185	6.60559095	5.30	1,193			15	Ea		12/18/2023	Component Item					Stock	09/25/12:00 a	

Purchase Order – Allocated Demand

Purchase Order PO4242 Crown Metal Works PENDING RECEIPT

Edit Back Get Predictions Receive Close Print Actions

Primary Information

PO # PO4242
 VENDOR Crown Metal Works
Vendor Performance

Classification

SUBSIDIARY United States
 LOCATION San Francisco

Items Billing Ship

CURRENCY US Dollar

Allocated Demand: NS-SA-E2

VIEW
Default Allocated Demand

Customize View

#	DEMAND TYPE	ORDER	CUSTOMER	ORDER STATUS	ALLOCATED	SUPPLY REQUIRED BY DATE	SUPPLY DAYS LATE	DEMAND DAYS LATE	REALLOCATE ORDER ITEM	SALES CHANNEL	ORDER RESERVATION
1	Sales Order	SO1750 0		Pending Fulfillment	60	09/26/2023					

Items 3,600.00 Expense 0.00

ITEM	VENDOR NAME	DESCRIPTION	QUANTITY	UNITS	INVENTORY DETAIL	RATE	ON HAND	AVAILABLE	RECEIVED	BILLED	ALLOCATED DEMAND	PURCHASE CONTRACT	AMOUNT	CLASS	INVENTORY SUBSIDIARY	INVENTORY LOCATION	CREATED FROM	EXCLUDE FROM PREDICTIVE RISK	EXPEC RECEIP DATE
NS-SA-E2 SA Example 2 - Allocation Strategies		Supply Allocation Example 2 with various Allocation Strategies	80	Ea		45.00	0	0	0	0	60		3,600.00		United States	San Francisco			09/12/2

Allocate Orders

Allocate Orders
More

Submit

Order Filters

SUBSIDIARY *

LOCATION

 Boston : Damaged Goods
 Contract Manufacturer
 Contract Manufacturer : Blast o Matic

ITEM

SALES CHANNEL

CUSTOMER

ORDER NO.

TRANSACTION TYPE

TRANSACTION DATE FROM

TRANSACTION DATE TO

SUPPLY REQUIRED BY DATE FROM

SUPPLY REQUIRED BY DATE TO

EXPECTED SHIP DATE FROM

EXPECTED SHIP DATE TO

ORDER PRIORITY FROM

ORDER PRIORITY TO

EST. GROSS PROFIT PERCENT FROM

EXCLUDE ZERO EST. EXTENDED COST

Sorting Options

SORT BY
 DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

Orders

ALLOCATION PROCESSING OPTION

SET ORDER LINE TO FIRM SELECT ALL ORDERS

Refresh
Customize

SELECT	ITEM	CUSTOMER	TRANSACTION TYPE	ORDER NO.	TRANSACTION DATE	QUANTITY IN TRANSACTION UNITS	ORDER QUANTITY	QUANTITY ALLOCATED	QUANTITY COMMITTED	COMMITMENT CONFIRMED	QUANTITY FULFILLED	ORDER PRIORITY	SUPPLY REQUIRED BY DATE	EXPECTED SHIP DATE	REALLOCATE ORDER ITEM	SPECIAL ORDER	SALES CHANNEL	ASSEMBLY	DAYS OVERDUE	EST. GROSS PROFIT (LINE)	EST. GROSS PROFIT PERCENT (LINE)
<input type="checkbox"/>	NS-SA-GPO1	41 Dynabox LLC.	Sales Order	Sales Order #SO1631	08/09/2023	3	3	0	0	No	0		10/05/2023	12/18/2023	Reallocate				0	114.00	54.2857%
<input type="checkbox"/>	NS-SA-GPO1	4 Twitterwire Industries	Sales Order	Sales Order #SO1632	08/09/2023	2	2	2	2	No	0		10/05/2023	10/05/2023					0	86.00	57.3333%
<input type="checkbox"/>	NS-SA-GPO1	306 Webster Electric	Sales Order	Sales Order #SO1633	08/09/2023	8	8	8	8	No	0		10/10/2023	10/10/2023					0	424.00	62.3529%

Order Allocation Schedule

Order Allocation Schedule

Save
Cancel

Primary Information

NAME *
Weekly Order Allocation INACTIVE

DESCRIPTION
Weekly finalization of allocations to make sure order get due priority.

Schedule

RECURRENT FREQUENCY *
Monthly

REPEAT EVERY *
1 month(s)

NEXT DATE *
09/20/2023

NEXT TIME *
4:00 pm (GMT-08:00) Pacific Time (US & Canada)

Order Options

SUBSIDIARY *
United States SET ORDER LINE TO FIRM

ALLOCATION PROCESSING OPTION
Using Sorting Options Only

Select and Sort Orders

CHOOSE YOUR METHOD TO SELECT AND SORT ORDERS:

SELECT ORDERS MANUALLY

SELECT ORDERS USING A SAVED SEARCH

SELECT ORDERS BY CREATING A NEW SEARCH

Search Criteria

LOCATION

Boston
 Boston : Damaged Goods
 Contract Manufacturer
 Contract Manufacturer : Blast o Matic

ITEM
<Type then tab>

SALES CHANNEL

CUSTOMER
<Type then tab>

ORDER NO.

TRANSACTION TYPE

TRANSACTION DATE FROM

SORT BY
Order Priority DESCENDING

THEN BY
Supply Required By Date DESCENDING

THEN BY
Order Quantity DESCENDING

TRANSACTION DATE TO

SUPPLY REQUIRED BY DATE FROM

SUPPLY REQUIRED BY DATE TO

EXPECTED SHIP DATE FROM

EXPECTED SHIP DATE TO

ORDER PRIORITY FROM

ORDER PRIORITY TO

EST. GROSS PROFIT PERCENT FROM

EXCLUDE ZERO EST. EXTENDED COST

Reallocate Items

Reallocate Items

More

Submit

ITEM *

NS-SA-Fill Rate

QUANTITY REQUIRED

22

LOCATION *

San Francisco

QUANTITY PICKED

0

QUANTITY ON HAND

3

UNITS

EA

QUANTITY COMMITTED

3

Auto Commit

<input type="checkbox"/>	SALES CHANNEL	ORDER DATE ▲	EXPECTED SHIP DATE	TRANSACTION TYPE	ORDER NO.	SPECIAL ORDER	CUSTOMER	QUANTITY ORDERED	QUANTITY REMAINING	QUANTITY RECEIVED	ALLOCATION STRATEGY	NUMBERED QUANTITY REMAINING	QUANTITY COMMITTED FROM ORDER RESERVATION	QUANTITY COMMITTED
<input type="checkbox"/>		08/17/2023	12/18/2023	Sales Order	SO1581		14 Vac Supplies Ltd.	6	6		ASAA-Available-Reserved	0	0	0
<input checked="" type="checkbox"/>		08/18/2023	11/01/2023	Sales Order	SO1582		12 Mobility Solutions	1	1		ASAA-Available-Reserved	0	0	1
<input type="checkbox"/>		08/18/2023	11/03/2023	Sales Order	SO1583		20 Chatterbridge inc.	3	3		ASAA-Available-Reserved	0	0	0
<input checked="" type="checkbox"/>		08/18/2023	11/06/2023	Sales Order	SO1584		41 Dynabox LLC.	4	4		ASAA-Available-Reserved	0	0	1
<input checked="" type="checkbox"/>		08/18/2023	11/04/2023	Sales Order	SO1585		289 Supply Industries	3	3		ASAA-Available-Reserved	0	0	1
<input type="checkbox"/>		08/18/2023	11/06/2023	Sales Order	SO1586		223 Skivee Incorporated	5	5		ASAA-Available-Reserved	0	0	0

Reallocate Items From SO Line

Allocation Alert
One or more order lines are not scheduled to be fulfilled by the Supply Requirement.

Sales Order #SO1581 14 Vac Supplies Ltd. **PENDING FULFILLMENT**

Buttons: Edit, Back, Fulfill, Close Order, Actions

Primary Information

ORDER # SO1581 DATE 08/17/2023
 CUSTOMER 14 Vac Supplies Ltd. PO #
 PROJECT MEMO

Classification

SUBSIDIARY United States CLASS
 DEPARTMENT

Sales Information

SALES REP Mike Daniels OPPOR
 PAIRED INTERCOMPANY TRANSACTION EX
 INTERCOMPANY STATUS DOCUM

Items Promotions Shipping Billing Accounting Relationships Co

ENABLE ITEM LINE SHIPPING
 DISCOUNT ITEM

ITEM	ORIGINAL ITEM	COMMITTED	ALLOCATED SUPPLY	PICKED	PACKED	FULFILLED
NS-SA-Fill Rate NS-SA-Fill Rate		0	4	0	0	

Reallocate Order Item
Sales Order #SO1581

Buttons: Cancel, Generate Recommendation, Accept Recommendation and Reallocate

NS-SA-Fill Rate

CUSTOMER 14 Vac Supplies Ltd. SALES REP Mike Daniels
 SUPPLY REQUIRED BY DATE 11/05/2023 QUANTITY 6
 PRIORITY 5 SET ORDER LINE TO FIRM
 SHIP TO LOCATION Coraopolis, PA

Recommendation Summary

EXPECTED SHIP DATE (ORIGINAL) 12/18/2023 SHIP FROM LOCATION San Francisco
 EXPECTED SHIP DATE (RECOMMENDED)

Select Orders for Reallocation Affected Orders Allocated Supply

VIEW Demand Orders Search TYPE - All -

Customize View

SELECT	DEMAND ORDER	CUSTOMER	ORDER PRIORITY	COMMITMENT CONFIRMED	QUANTITY	SUPPLY REQUIRE
<input checked="" type="checkbox"/>	Sales Order #SO1583	20	1 F		3	11/03/2023
<input checked="" type="checkbox"/>	Sales Order #SO1584	41	2 F		4	11/02/2023
<input checked="" type="checkbox"/>	Sales Order #SO1582	12	3 F		1	11/01/2023
<input checked="" type="checkbox"/>	Sales Order #SO1585	289	4 F		3	11/04/2023
<input type="checkbox"/>	Sales Order #SO1586	223	6 F		5	11/06/2023

Buttons: Cancel, Generate Recommendation, Accept Recommendation and Reallocate

Summary

SUBTOTAL	432.00
DISCOUNT ITEM	
TAX TOTAL	0.00
SHIPPING COST	15.03
HANDLING COST	
TOTAL	447.03

SALES CHANNEL

PARTNER

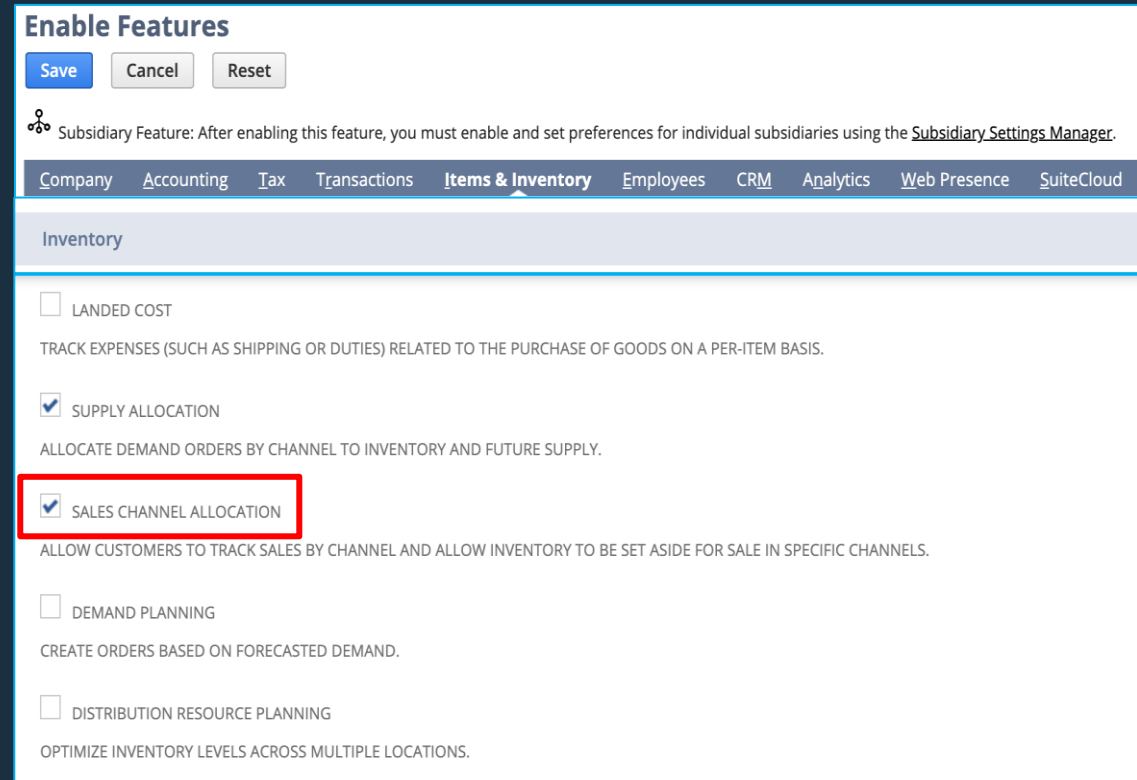
SOURCE

EXPECTED SHIP DATE	PRICE LEVEL	RATE	BY DATE	DATE	REALLOCATE ORDER ITEM	CREATE WO
12/18/2023	List Price	72.00	11/05/2023		Drop Ship Spec. Ord.	Reallocate

Sales Channel Allocation - Setup


Enable the Sales Channel Allocation feature

- Pre-requisite: Supply Allocation
- Setup >Company >Enable Features >Items & Inventory >Sales Channel Allocation
- When the feature is enabled, the user can go directly to define Sales Channels



Enable Features

[Save](#) [Cancel](#) [Reset](#)

 Subsidiary Feature: After enabling this feature, you must enable and set preferences for individual subsidiaries using the [Subsidiary Settings Manager](#).

[Company](#) [Accounting](#) [Tax](#) [Transactions](#) [Items & Inventory](#) [Employees](#) [CRM](#) [Analytics](#) [Web Presence](#) [SuiteCloud](#)

Inventory

LANDED COST
TRACK EXPENSES (SUCH AS SHIPPING OR DUTIES) RELATED TO THE PURCHASE OF GOODS ON A PER-ITEM BASIS.

SUPPLY ALLOCATION
ALLOCATE DEMAND ORDERS BY CHANNEL TO INVENTORY AND FUTURE SUPPLY.

SALES CHANNEL ALLOCATION
ALLOW CUSTOMERS TO TRACK SALES BY CHANNEL AND ALLOW INVENTORY TO BE SET ASIDE FOR SALE IN SPECIFIC CHANNELS.

DEMAND PLANNING
CREATE ORDERS BASED ON FORECASTED DEMAND.

DISTRIBUTION RESOURCE PLANNING
OPTIMIZE INVENTORY LEVELS ACROSS MULTIPLE LOCATIONS.

Sales Channel Allocation - Setup

Define Sales Channels

- Setup >Order Management >Sales Channels >New
- A simple record with:
 - Name
 - Description
 - Attributes to a Sales Order
 - The Sales Order can be assigned to the channel
 - The channel Order Priority is defaulted on the Sales Order lines

The screenshot shows the Oracle NetSuite interface for creating a new Sales Channel. The top navigation bar includes 'Setup', 'Customization', and 'Support'. The main header is 'Sales Channel' with 'List', 'Search', and 'Customize' options. Below the header are 'Save', 'Reset', and 'Cancel' buttons. The form includes an 'INACTIVE' checkbox, a 'NAME' field with an asterisk containing 'OEM Customers', and a 'DESCRIPTION' field containing 'Manufacturers. They place orders in advance and expect 100%.'. A red box highlights the 'ORDER PRIORITY' field, which is currently empty, and a checkbox labeled 'CAN ONLY USE DEDICATED ORDER RESERVATIONS AS SUPPLY'.

Sales Channel Allocation - Setup

Preferences for Order Reservations (Optional)

Example: To Automate the Closing of Order Reservation

When approved, the reservation is effective until:

- It's End Date OR
- The reservation quantity is fully allocated and fulfilled OR
- The reservation is manually closed.

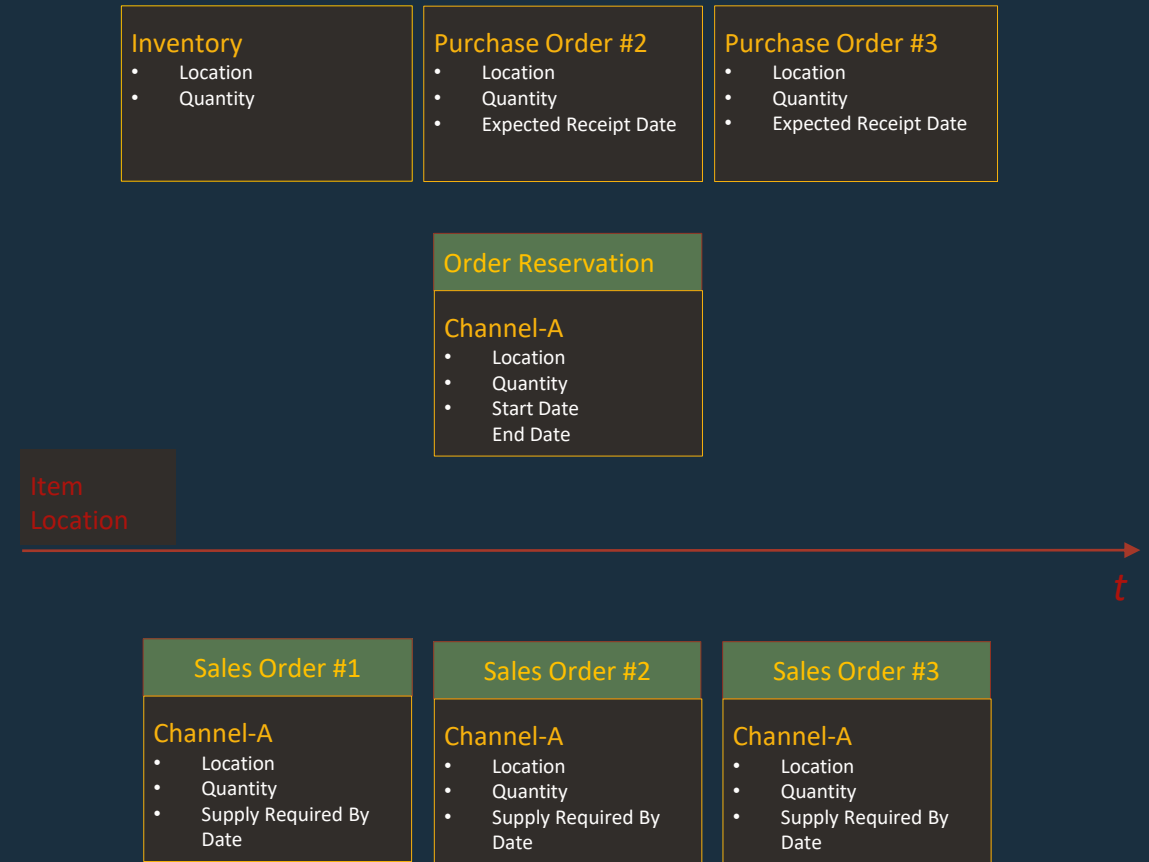
A daily background process can automatically close Order Reservations that have passed their End Date.

The timing of the background process can be set up under
Setup >Order Management >Supply Allocation Setup >Demand Preferences

Manage Supply Allocations by Channel

Set current inventories aside for sales channels

- We want to set aside current and future inventories, so that those are available, when orders arrive from the sales channel.
- The inventories are set aside by order reservations.
- Order reservations are “containers” that reserve quantities of inventory and supply orders. Only a specific channel can consume the reserved quantities.
- An order reservation can:
 - Cover the supply needs of a channel:
 - For an Item
 - On a Location
 - For a period of time
- Ensure that other channels do not consume the supply set aside



Sales Channels and Order Reservations

Order Reservation

← → List Search

Edit
Back
Actions ▾

Primary Information

ID 5	ITEM NS-SA-GPO2	LOCATION San Francisco
NAME GPO2 Online Sales for item NS-SA-GPO2	SALES CHANNEL Online Sales	ORDER PRIORITY 2.0
SUBSIDIARY United States		

Allocation Details

ORDER ALLOCATION STRATEGY ASAA-Available-Firm	START DATE 10/05/2023	TRANSACTION DATE 08/09/2023
<input checked="" type="checkbox"/> COMMITMENT FIRM	END DATE 10/31/2023	

Request Details

QUANTITY 10.0	ALLOCATED SUPPLY 10.0	TARGET QUANTITY
ALLOCATED DEMAND 10.0	QUANTITY COMMITTED 10.0	DAYS LATE
UNITS EA	QUANTITY REMAINING 0	<input type="checkbox"/> CLOSED

Supply Allocation
Fulfillment
System Information
Workflow
☰

Supply Allocation

VIEW

Basic ▾

Customize View

SUPPLY TYPE	SUPPLY ORDER	SUPPLY ORDER STATUS	SUPPLY SOURCE	SUPPLY QUANTITY	SUPPLY RECEIPT DATE	ALLOCATED	DAYS LATE	DEMAND TYPE	DEMAND ORDER	CUSTOMER	DEMAND ORDER STATUS	SUPPLY REQUIRED BY DATE
Inventory for Commitment and Allocation			San Francisco	10		10		Sales Order	SO1634	Dazzlesphere Company	Pending Fulfillment	10/05/2023

Optimization Options

Supply Allocation Automated Processing Options

Fill Rate Optimization

NetSuite's batch allocation logic calculates the largest possible number of order lines fully allocated on time.



Revenue Optimization on Sales Order

The system allocates existing supply to produce the maximum sales revenue.

Revenue is defined as the company income on the sales transaction after the product is sold (invoiced). The revenue on the sales order line is stored by the amount field, in the transaction currency.

Gross Profit Optimization on Sales Order

The system allocates the existing supply to maximize sales profits.

Gross Profit is the remaining sales transaction amount after deducting the direct item cost from the revenue. When the Gross Profit feature is enabled, gross profit is calculated on the sales order line and stored by the Est. Gross Profit field in the transaction currency.

Earliest Item Availability

Earliest Item Availability
More

Primary Information

SUBSIDIARY *

ITEM *

SALES CHANNEL

QUANTITY

ALLOCATION STRATEGY

SUPPLY REQUIRED BY DATE

LOCATION	ATP LEAD TIME	QUANTITY ON HAND	QUANTITY COMMITTED	QUANTITY AVAILABLE	FUTURE QUANTITY	QUANTITY ALLOCATED	QUANTITY AVAILABLE TO ALLOCATE	EARLIEST AVAILABLE DATE
Blast o Matic	90	0	0	0	0	0	0	
Boston	10	15	0	15	0	0	15	
CoaterUp	90	0	0	0	0	0	0	
Contract Manufacturer	90	0	0	0	0	0	0	
Denver	7	15	0	15	0	0	15	
Hannover	15	15	0	15	0	0	15	
Hanoi	20	15	0	15	0	0	15	
London	15	50	0	50	0	0	50	
New Jersey	10	15	0	15	0	0	15	
San Francisco	7	13	13	0	15	28	0	
San Mateo	90	15	0	15	0	0	15	
Seattle	90	0	0	0	0	0	0	
Toronto	90	15	0	15	0	0	15	

Earliest Item Availability on Sales Orders

- Pop-up from sales order form
- Icon visible in Edit mode
- Allows for What If analysis
- Changes can be applied to order line from pop-up

The screenshot shows the Oracle NetSuite 'Sales Information' form. A pop-up window titled 'Earliest Availability' is open, displaying order information for a specific line item. The pop-up includes fields for 'SUBSIDIARY' (United States), 'LOCATION' (San Francisco), 'ITEM' (NS-SA-E2), 'SALES CHANNEL', 'QUANTITY' (100.0), 'FULFILLED' (0.0), 'ALLOCATION STRATEGY' (ASAA-Available-Reserved), 'SUPPLY REQUIRED BY DATE' (09/26/2023), and 'EARLIEST AVAILABLE DATE' (09/19/2023). The background form shows a table with columns for ITEM, INVENTORY LOCATION, INVENTORY SUBSIDIARY, QUANTITY, UNITS, DATE, and EARLIEST AVAILABLE DATE. A callout box with a question mark icon points to the 'Earliest Available Date' field in the table.

ITEM *	INVENTORY LOCATION	INVENTORY SUBSIDIARY	QUANTITY	UNITS	DATE	EARLIEST AVAILABLE DATE	SUPPLY	AVAILAB
<Type then tab>	San Francisco	United States	100	Ea	09/26/2023	09/19/2023		100



Demo

Supply Planning

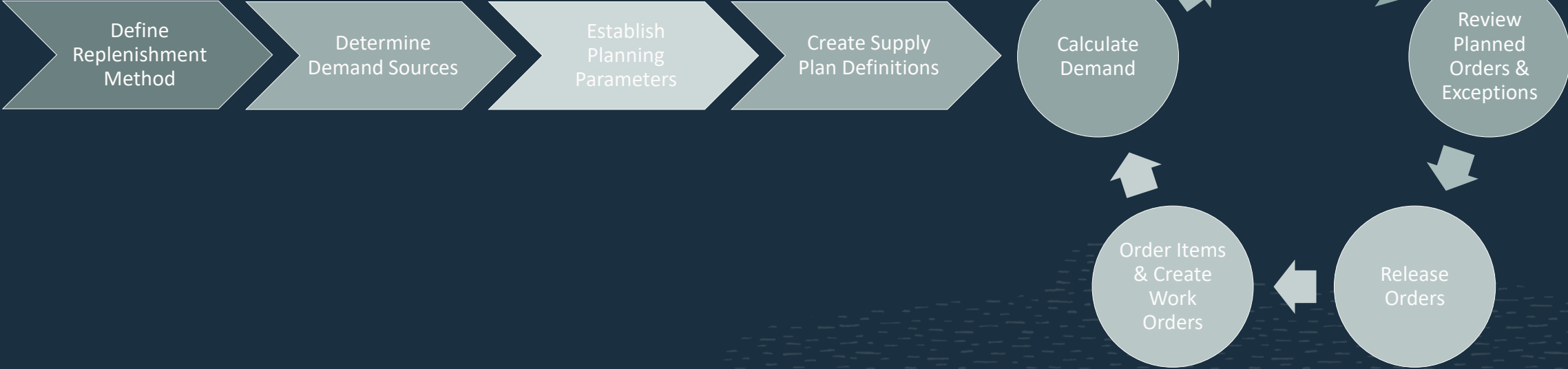
The Planning World

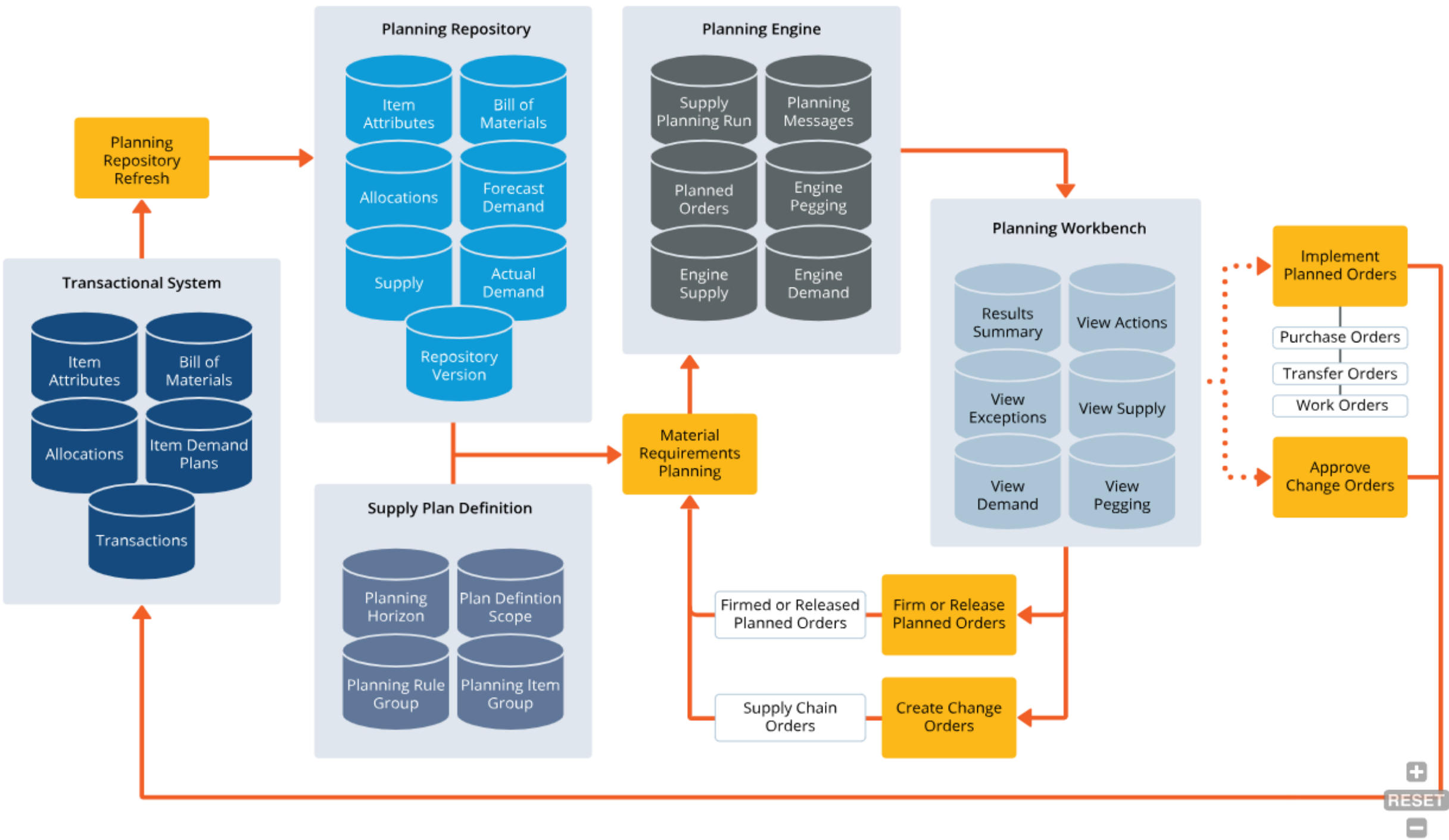
- Demand Planning
- Supply Planning = Material Requirements Planning (MRP)
- MRP is an infinite planning tool
 - Unconstrained vs Constrained Planning (Infinite / Finite)
 - Example of constrained planning: Enforce Capacity Constraints, Enforce Demand
- Sales & Operations Planning (S&OP)
- Master Production Schedule (MPS)
- Capacity Requirements Planning (CRP)
- Rough Cut Capacity Planning (RCCP)
- Association for Supply Chain Management (ASCM)
 - Certified Supply Chain Professional (CSCP)
 - ASCM was formerly APICS – American Production and Inventory Control Society
 - Issued CPIM certification – Certified in Planning and Inventory Management



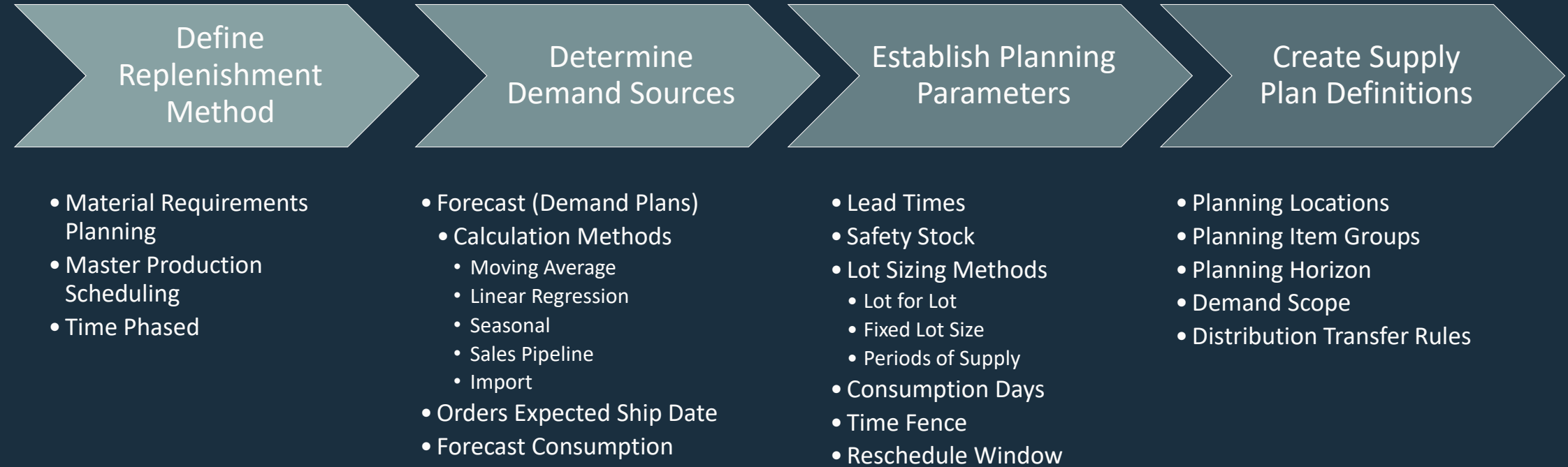
Material Planning Process

Planning Cycle





Material Planning Configuration



Important: Did you know that the NetSuite [Supply Planning \(MRP\)](#) solution replaces Time-Phased Planning, with more features and better performance? New customers should use the new [Supply Planning \(MRP\)](#) solution. Existing customers should develop a plan to move from Time-Phased Planning to the new solution.

Setup

Prerequisites – Required Features:

- Assembly Items
- Work Orders
- Advanced Inventory Management
- Advanced Bill of Materials
- Multi-Location Inventory
- Material Requirements Planning

To access these prerequisite features, go to: Setup > Company > Enable Features > Items & Inventory Tab > Inventory section

MULTI-LOCATION INVENTORY
TRACK INVENTORY FOR MULTIPLE LOCATIONS. MAINTAIN A TOTAL COUNT AND PER-LOCATION COUNT FOR INVENTORY ITEMS.

ASSEMBLY ITEMS
ALLOW BUILDING AND STOCKING OF ASSEMBLY ITEMS FROM COMPONENTS.

ADVANCED BILL OF MATERIALS
ENABLES A STAND-ALONE RECORD FOR BILL OF MATERIALS, INDEPENDENT TO ITEM.

WORK ORDERS
CREATE AND TRACK WORK ORDERS.

ADVANCED INVENTORY MANAGEMENT
AUTOMATICALLY CALCULATE REORDER POINTS AND PREFERRED STOCK LEVELS BASED ON HISTORICAL PURCHASE AND SALE DATA.

MATERIAL REQUIREMENTS PLANNING
MATERIAL REQUIREMENTS PLANNING.

Supply Planning Workbench – Setup

Prerequisites – Required Preferences:

- Allow Purchase of Assembly Items
- Use Lead Time Per Location
- Purchase Order Approval Routing

Allow Purchase of Assembly Items – Go to: Setup > Accounting > Accounting Preferences > Order Management Tab > Work Order section

ALLOW PURCHASE OF ASSEMBLY ITEMS

Use Lead Time Per Location – Go to: Setup > Accounting > Inventory Management Preferences

USE LEAD TIME AND SAFETY STOCK PER LOCATION

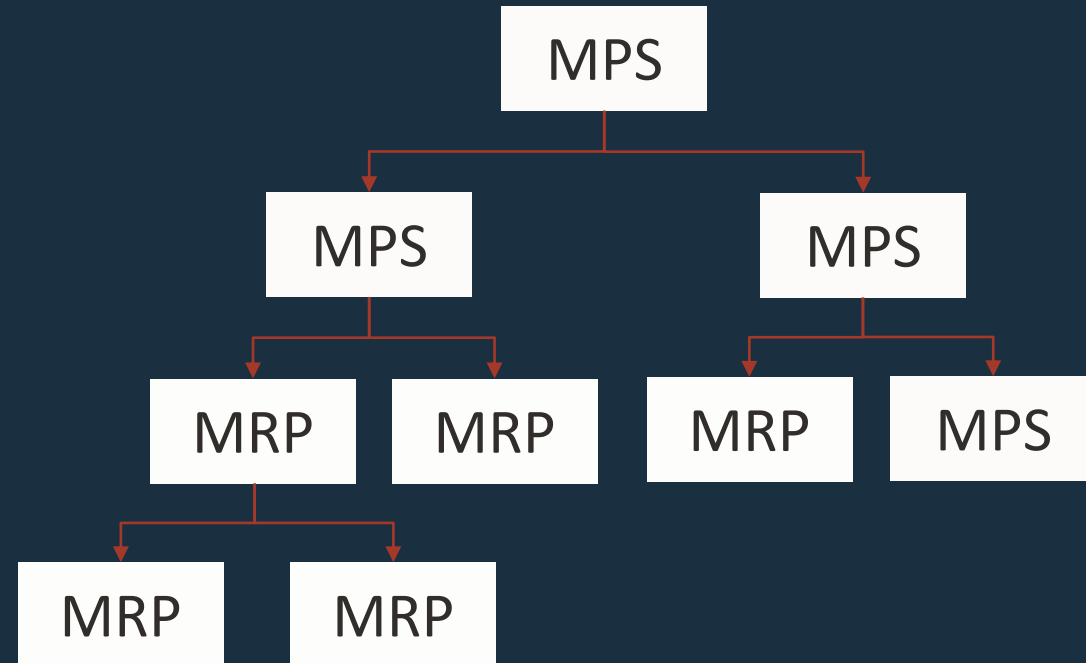
Purchase Order Approval Routing – Go to: Setup > Accounting > Accounting Preferences > Approval Routing Tab

PURCHASE ORDERS

MPS Replenishment Method

Master Production Schedule (MPS):

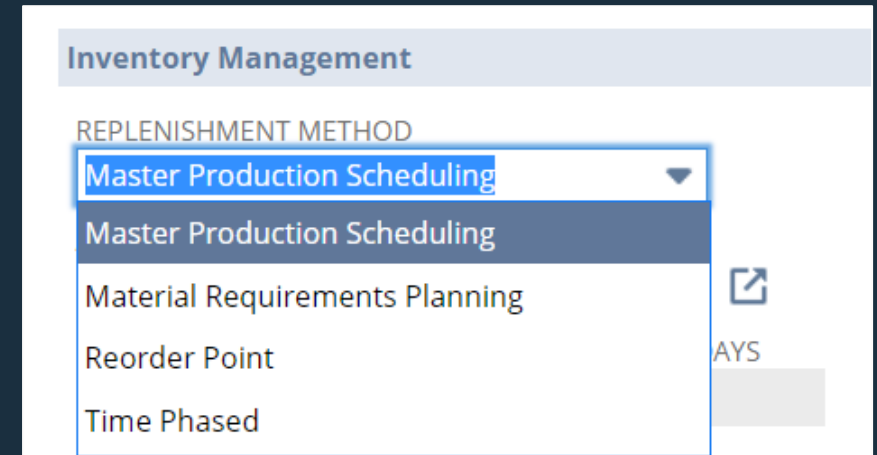
- For manufacturing companies, having visibility to their Master Production Schedule is critical.
- It provides a view of the **critical** items they produce, and distinguishes them from the items they require as components or raw materials, that will be needed to do the production.
- The added ability to differentiate MPS from MRP items **will enable Supply Planning to send MPS items to Rough Cut Capacity Planning (RCCP)** in a future release.



MPS Replenishment Method

Master Production Schedule (MPS):

- The Replenishment Method can be set at the item level to either Master Production Scheduling (MPS) or Material Requirements Planning (MRP).
- Both MPS and MRP items will be processed by the Supply Planning engine.
- The engine will process MPS and MRP items in a single run (i.e. it will not stop after processing MPS items).



Item Setup

Setup

Item/location level –
Planning subtab

Item Location Configuration

Save | Cancel | Customize Form | New Field | Actions

Primary Information

NAME *
MRP-FG2 - San Francisco

ITEM
MRP-FG2

SUBSIDIARY
United States

WMS SEQUENCE NUMBER

MEMO

LOCATION
San Francisco

Costing | Inventory Count | Order Management | **Planning** | Planning Times | Other | System Information

Planning

DEMAND SOURCE

SUPPLY TYPE
Build

FIXED LOT MULTIPLE

FIXED LOT SIZE

MINIMUM ORDER QUANTITY

SUPPLY LOT SIZING METHOD
Lot For Lot

PERIODS OF SUPPLY INCREMENT

PERIODS OF SUPPLY TYPE

PREFERRED STOCK LEVEL

REORDER POINT

SAFETY STOCK LEVEL

PURCHASE LEAD TIME

LEAD TIME OFFSET

WORK ORDER FIXED LEAD TIME

WORK ORDER VARIABLE LEAD TIME
1

AUTO CALCULATE PRODUCTION LEAD TIME

WORK ORDER LEAD TIME LOT SIZE
8

Item Setup

Setup

Item/location level –
Planning Times subtab

Item Location Configuration

Save Cancel Customize Form New Field Actions

Primary Information

NAME *
MRP-FG2 - San Francisco

MEMO

ITEM
MRP-FG2

SUBSIDIARY
United States

LOCATION
San Francisco

WMS SEQUENCE NUMBER

Costing Inventory Count Order Management Planning **Planning Times** Other System Information

Planning Times

LATE PERIOD DAYS

FIRM/RELEASE ADVANCE WARNING THRESHOLD
1

HIGH IMPACT LATE DEMAND THRESHOLD

PAST DUE FORECAST DAYS

BACKWARD CONSUMPTION DAYS

FORWARD CONSUMPTION DAYS

DEMAND TIME FENCE

PLANNING TIME FENCE

RESCHEDULE IN DAYS
10

RESCHEDULE OUT DAYS
10

MINIMUM RESCHEDULE DAYS

RESCHEDULE HORIZON
45

Save Cancel Customize Form New Field Actions

Supply Plan Definition

Setup

In order to come up with a supply plan definition, the planner needs to setup the following:

- Planning Item Categories
- Planning Item Groups
- Planning Rule Groups

Supply Plan Definition

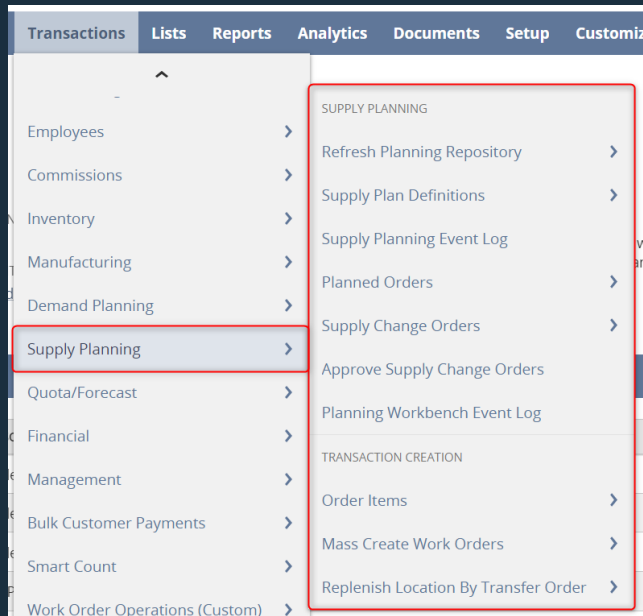
Setup

The supply plan definition contains the specific criteria of the planner that will be included on the MRP run.

The planner can make multiple supply plan definition for analysis.

For example, the planner wants to have a supply plan definition for their daily analysis of existing products and components.

And then the planner can have another supply plan definition for upcoming products and how it will affect existing components, sub-assemblies, and new additional components.



ORACLE NETSUITE

Search

Help Feedback Kathryn Glass OPS1492 - MRP - Administrator

Activities Advanced Manufacturing Payments Transactions Lists Reports Analytics Documents Setup Customization Commerce

Supply Plan Definition

Outsourced Mfg

← → List Search

[Edit](#) [Back](#) [Launch](#) Actions

NAME	HORIZON (IN DAYS)	DESCRIPTION
Outsourced Mfg	180	Manufacturing scenario where we send raw material to outside vendors to sandblast and powder coat and receive back subassemblies.
PLANNING RULE GROUP	PLANNING ITEM GROUP	<input checked="" type="checkbox"/> GENERATE PEGGING
SAF200 Contract Mfg	SAF200 and Components	
PLANNING WORKBENCH VIEW		

Workflow **Scope** System Notes

LOCATION	DEMAND SOURCE TYPE	CONSUME FORECAST
CoaterUp	Sales Orders	
Blast o Matic	Sales Orders	
San Francisco	Sales Orders	
San Francisco	Demand Plans	

Show desktop

Refresh Planning Repository

- Background process that updates the planning data repository. The planning data repository contains the transactional and other item-related data for the MRP run
- Picks up items with 'MRP' or 'MPS' replenishment method
- To reach the planning repository page, go to: Transactions > Supply Planning > Refresh Planning Repository.

ORACLE NETSUITE

Search

Activities Advanced Manufacturing Payments Transactions Lists Reports Analytics Documents Setup Customiz

Refresh Planning Repository

Refresh data

Transfer Type

COMPLETE REFRESH
 NET-CHANGE REFRESH

Refresh Options

Net-Change Refresh allows you the option to specify only Item Setup data. Specifying Transactions will ensure that any changes since the previous refresh will also be included.

ITEM SETUP
 ITEM SETUP AND TRANSACTIONS

ITEM SETUP: Item/Location Attributes and Bill of Materials
TRANSACTIONS: Demand Plans, Sales Orders, Inbound Shipments, Purchase Orders, Transfer Orders, and Work Orders

DATE RANGE

DATE FROM: 06/12/2023
DATE TO: 11/01/2023

There are open transactions in past periods. Oldest transaction date is: 12/07/2022.

Supply Plan Definitions

Optionally choose to launch Supply Plan Definitions after the Planning Repository is successfully refreshed.

SUPPLY PLAN DEFINITIONS

- All Items in San Francisco
- Item 360 Plan
- Item Planning Fields
- Manufacturing Mobile
- Multi-Location MRP

Schedule Repository Refresh & MRP run

To create a Schedule:

- Choose Refresh Options
- Specify a date range for extracting data
- Choose from a list of supply plans to run after the refresh is complete (Optional)
- Enter Scheduling Parameters

The screenshot shows the Oracle Netsuite interface for configuring a Planning Repository Refresh Schedule. The page title is "Planning Repository Refresh Schedule" and it includes "Save", "Cancel", and "Reset" buttons. The configuration is divided into several sections:

- Transfer Type:** Radio buttons for "COMPLETE REFRESH" (selected) and "NET-CHANGE REFRESH".
- Refresh Options:** Radio buttons for "ITEM SETUP", "ITEM SETUP AND TRANSACTIONS" (selected), and "NET-CHANGE REFRESH". Below this, there are fields for "ITEM SETUP:" (Item/Location Attributes and Bill of Materials) and "TRANSACTIONS:" (Demand Plans, Sales Orders, Inbound Shipments, Purchase Orders, Transfer Orders, and Work Orders).
- DATE RANGE:** Fields for "DATE FROM" (06/12/2023) and "DATE TO" (11/01/2023). Below these are fields for "DAYS IN THE PAST" (99) and "DAYS IN THE FUTURE" (43). A note states: "The above date range translates to the relative days shown below, for future scheduled refreshes. There are open transactions in past periods. Oldest transaction date is: 12/07/2022."
- Supply Plan Definitions:** A section with the instruction "Optionally choose to launch Supply Plan Definitions after the Planning Repository is successfully refreshed." and a list of definitions: "All Items in San Francisco", "Item 360 Plan", "Item Planning Fields", "Manufacturing Mobile", and "Multi-Location MRP".
- Schedule:** A section highlighted with a red border containing scheduling parameters: "NAME *", "NEXT DATE *", "NEXT TIME *", "RECURRANCE FREQUENCY *" (set to "Daily"), "REPEAT EVERY *" (set to "1"), "END RECURRANCE ON", and an "INACTIVE" checkbox.

Refresh Planning Repository & Launch MRP



Refresh Planning Repository

Reset Refresh Data

Transfer Type

- COMPLETE REFRESH
- NET-CHANGE REFRESH

Refresh Options

Net-Change Refresh allows you the option to specify only Item Setup data. Specifying Transactions will ensure that any changes since the previous refresh will also be included.

- ITEM SETUP
- ITEM SETUP } TRANSACTIONS

ITEM SETUP: Item/Location Attributes and Bill of Materials

TRANSACTIONS: Demand Plans, Sales Orders, Inbound Shipments, Purchase Orders, Transfer Orders, and Work Orders

DATE RANGE

DATE FROM: 5/16/2020 DATE TO: []

Supply Plan Definitions

Optionally choose to launch Supply Plan Definitions after the Planning Repository is successfully refreshed.

SUPPLY PLAN DEFINITIONS

- T7 Plan
- T9 Plan

Review Planned Orders & Exceptions

Action Types



- Cancel
- Lead Time Threshold
- Reschedule In
- Reschedule Out
- Time Fence Threshold

Exception Types



- Insufficient Lead Time
- Item has no Activity
- Negative Starting Balance
- Negative Time Fence Balance
- Past Due Demand & Past Due Supply

Supply Types



- Inbound Shipment
- On-hand Quantity
- Planned Transfer Order
- Planned Work Order
- Planned Purchase Order
- Purchase Order
- Supply Change Order
- Transfer Order
- Work Order

Demand Types



- Actual Demand
- Forecast Demand
- Planned Transfer Order
- Planned Work Order
- Safety Stock
- Supply Change Order
- Transfer Order
- Work Order

Planning Workbench

Plan List Event Log

SUPPLY PLAN DEFINITION [Item Planning Fields](#)

REPOSITORY REFRESHED 09/18/2023 8:08 pm

DATE RANGE

PLANNING HORIZON 09/18/2023 - 03/16/2024

RESULTS GENERATED 09/18/2023 8:09 pm

09/18/2023 To 03/16/2024

ITEM FILTERS

PLANNING WORKBENCH VIEW

Select View

REPLENISHMENT METHOD

All Methods

PLANNING ITEM CATEGORY

Planning Fields

ITEM

All items

All Locations

United States

MESSAGE / ORDER FILTERS

ACTION TYPE

All Actions

EXCEPTION TYPE

All Exceptions

SUPPLY TYPE

All Supply

DEMAND TYPE

All Demand

RESULTS SUMMARY

Show: 50 1 of 1 Total: 9

ITEM DETAILS		INVENTORY MEASURES				MESSAGE / ORDER COUNTS			
ITEM	ITEM DESCRIPTION	UNITS	ON-HAND	ON-ORDER	LATE DEMAND	ACTION	EXCEPTION	SUPPLY	DEMAND
ALL ITEMS	ALL ITEMS	---	---	---	---	4	14	53	52
> I360-Assembly-5 HP Centrifugal Pump	5 HP 208-460 Volts Centrifugal Pu...	Eas(1)	55	49			6	10	16
I360-Inventory Impeller Housing	Item 360 Lot Numbered Inventory ...	EA	74	45				13	11
I360-Sub-Assembly	Lot Numbered Subassembly for Ite...	EA	15					3	3
MRP-FC Consumption	MRP-FC Consumption		115	900	10	1	2	17	9
> MRP-FG (60 min/unit)	Finished Good Assembly	Ea		8	16	2	4	2	3
MRP-PTF	Planning Time Fence test item				55	1	2	1	2
NS-SA-E3	Supply allocations example 3 for R...	Ea	100					1	1
NS-SCCT	Item used in Supply Chain Control ...	EA	78	45				6	7

Date-Based Grid View

ORACLE NETSUITE Kathryn Glass
OPS1492 - MRP - Administrator

Search Help Feedback

Activities Advanced Manufacturing Payments Transactions Lists Reports Analytics Documents Setup Customization Commerce Quality Fixed Assets Configurator Guided Selling Projects

Planning Workbench All Locations Date-Based View Plan List Event Log

PLANNING PERIOD SIZE: Daily [Grid View](#) | [Graph View](#)

ITEM: I360-ASSEMBLY-5 HP CENTRIFUGAL PUMP	PAST DUE	09/18/2023	09/19/2023	09/20/2023	09/21/2023	09/22/2023	09/23/2023	09/24/2023	09/25/2023	09/26/2023	09/27/2023	09/28/2023
<i>Item Forecast</i>							18					
Unconsumed Forecast							18					
<i>Sales Orders</i>	8											
<i>Planned Transfer Orders</i>												
<i>Transfer Orders</i>												
Total Demand	8	0	0	0	0	0	18	0	0	0	0	0
<i>Parent Planned Work Orders</i>												
<i>Parent Work Orders</i>												
Production Requirements	0	0	0	0	0	0	0	0	0	0	0	0
Projected Gross Requirements	8	0	0	0	0	0	18	0	0	0	0	0
<i>Current Item Purchase Orders</i>												
<i>Current Item Work Orders</i>	10											
<i>Current Item Transfer Orders</i>												
Scheduled Receipts	10	0	0	0	0	0	0	0	0	0	0	0
Safety Stock	15											
Projected Available Balance	57	57	57	57	57	57	39	39	39	39	39	39
Adjusted Available Balance	57	57	57	57	57	57	39	39	39	39	39	39
<i>Firm Planned Order</i>												
<i>Planned Order</i>												
System Orders	0	0	0	0	0	0	0	0	0	0	0	0

MRP-FC Consumption	MRP-FC Consumption	115	900	10	1	2	17	9
MRP-FG (60 min/unit)	Finished Good Assembly Ea	8	16	2	4	2	3	
MRP-PTF	Planning Time Fence test item		55	1	2	1	2	

Date-Based Graph View - Definitions

ORACLE NETSUITE

Search

Kathryn Glass
OP51492 - MRP - Administrator

Activities Advanced Manufacturing Payments Transactions Lists Reports Analytics Documents Setup Customization Commerce Quality Fixed Assets Configurator Guided Selling Projects

Planning Workbench All Locations Date-Based View

PLANNING PERIOD SIZE
Daily

Daily Adjusted Available Balance

Safety Stock 15 Eas(1)

Adjusted Available Balance

Grid View **Graph View**

Date	Adjusted Available Balance
09/18/2023	57
09/19/2023	57
09/20/2023	57
09/21/2023	57
09/22/2023	57
09/23/2023	57
09/24/2023	39
09/25/2023	39
09/26/2023	39
09/27/2023	39
09/28/2023	39
09/29/2023	39
09/30/2023	19
10/01/2023	39
10/02/2023	39
10/03/2023	39
10/04/2023	39
10/05/2023	39
10/06/2023	39
10/07/2023	18
10/08/2023	18
10/09/2023	18
10/10/2023	18
10/11/2023	18
10/12/2023	18
10/13/2023	18
10/14/2023	36
10/15/2023	15
10/16/2023	15
10/17/2023	15
10/18/2023	15
10/19/2023	15
10/20/2023	15
10/21/2023	34
10/22/2023	15
10/23/2023	15
10/24/2023	15
10/25/2023	15
10/26/2023	15
10/27/2023	32
10/28/2023	15
10/29/2023	15
10/30/2023	15
10/31/2023	15
11/01/2023	34
11/02/2023	34
11/03/2023	34
11/04/2023	18
11/05/2023	18
11/06/2023	18
11/07/2023	18
11/08/2023	18
11/09/2023	29
11/10/2023	29
11/11/2023	15
11/12/2023	15
11/13/2023	15
11/14/2023	15
11/15/2023	15
11/16/2023	15
11/17/2023	25
11/18/2023	15
11/19/2023	15
11/20/2023	15
11/21/2023	15
11/22/2023	15
11/23/2023	15
11/24/2023	24
11/25/2023	15
11/26/2023	15
11/27/2023	15
11/28/2023	15
11/29/2023	15
11/30/2023	15
12/01	15

MRP-FC Consumption 115 900 10 1 2 17 9

MRP-FG (60 min/unit) Finished Good Assembly Ea 8 16 2 4 2 3

MRP-PTF Planning Time Fence test item 55 1 2 1 2

Date-Based Grid View - Definitions

Column	Past Due	Description
Item Forecast		Item Demand Plans
Unconsumed Forecast		Portion of Demand Plans that have not been consumed by Sales Orders
Sales Orders		Unfulfilled Sales Orders
Planned Transfer Orders		Planned Transfer Orders for which the current location is the Source
Transfer Orders		Unshipped Transfer Orders for which the current location is the Source
Total Demand		Total <u>Demand</u> from above Forecast, Sales Orders, Transfer Orders
Parent Planned Work Orders		Planned Work Orders for Item(s) that are a parent to the current item.
Parent Work Orders		Work Orders for item(s) that are a parent to the current item
Production Requirements		Total <u>Production Requirements</u> from above parent Planned Work Orders, Work Orders
Projected Gross Requirements		Total <u>Demand</u> and <u>Production Requirements</u> from above Rows
Current Item Purchase Orders		Purchase Orders for the current item (Not yet received)
Current Item Work Orders		Work Orders for the current item (Not yet completed)
Current Item Transfer Orders		Transfer Orders for which the current location is the Destination (Not yet received)
Scheduled Receipts		Total Scheduled Receipts from above Purchase Orders, Work Orders, Transfer Orders
Projected Available Balance	On Hand Quantity	Total Demand + Scheduled Receipts - Projected Gross Requirements (Current State)
Adjusted Available Balance	On Hand Quantity	Total Demand + Scheduled Receipts - Projected Gross Requirements + System Orders (Balanced)
Firm Planned Order		Firm Planned Orders for the current item
Planned Orders		Planned Orders for the current item
System Orders		Firm Planned Orders + Planned Orders

Alert for High Impact Late Demand

High Impact Late Demand Threshold

- Late demand is one of the most immediate concerns for planners.
- A parameter is provided at the item & location to establish a threshold for high impact late demand.
- This will help to highlight severe cases of late demand, so they can be addressed.

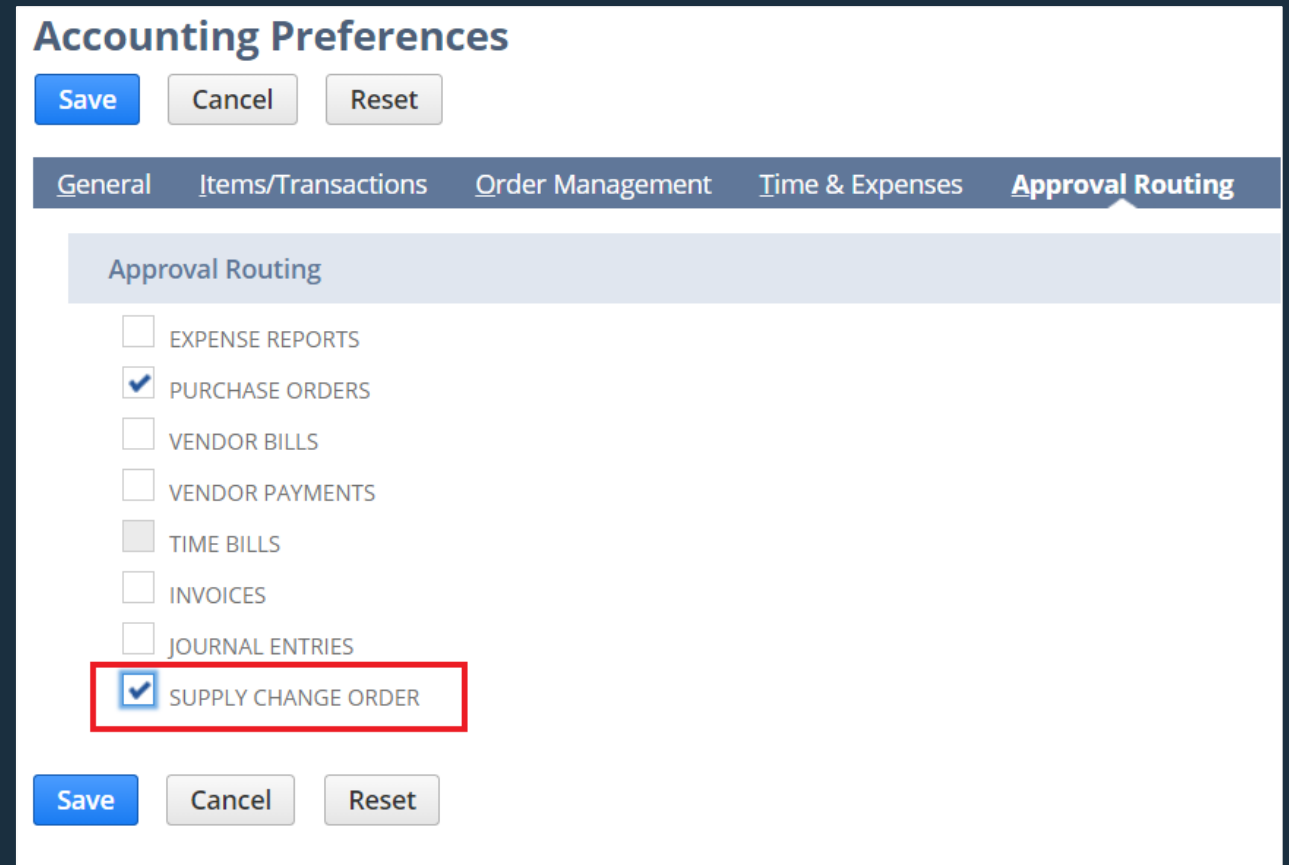
The screenshot shows the 'Planning Times' configuration form in Oracle NetSuite. The form is titled 'Planning Times' and is part of the 'Planning' section. It contains several input fields for configuring planning parameters:

- LATE PERIOD DAYS:** An empty text input field.
- FIRM/RELEASE ADVANCE WARNING THRESHOLD:** A text input field containing the value '1'.
- HIGH IMPACT LATE DEMAND THRESHOLD:** A text input field containing the value '40', which is highlighted with a blue border.
- PAST DUE FORECAST DAYS:** An empty text input field.
- BACKWARD CONSUMPTION DAYS:** An empty text input field.
- FORWARD CONSUMPTION DAYS:** An empty text input field.

At the bottom of the form, there are four buttons: 'Save' (with a dropdown arrow), 'Cancel', 'Customize Form', and 'New Field'.

Change Order Approval

On the Accounting Preferences Screen:
Enable Custom Workflow Approval for
Change Orders



The screenshot displays the 'Accounting Preferences' interface. At the top, there are three buttons: 'Save' (highlighted in blue), 'Cancel', and 'Reset'. Below this is a navigation bar with tabs for 'General', 'Items/Transactions', 'Order Management', 'Time & Expenses', and 'Approval Routing' (which is currently selected). The main content area is titled 'Approval Routing' and contains a list of items with checkboxes:

- EXPENSE REPORTS
- PURCHASE ORDERS
- VENDOR BILLS
- VENDOR PAYMENTS
- TIME BILLS
- INVOICES
- JOURNAL ENTRIES
- SUPPLY CHANGE ORDER

The 'SUPPLY CHANGE ORDER' checkbox is highlighted with a red rectangular border. At the bottom of the screen, there are three buttons: 'Save' (highlighted in blue), 'Cancel', and 'Reset'.

Change Order Approval

The actions subtab on the workbench will provide suggestions for canceling or rescheduling orders



All change orders/cancellation will be fed into NS for visibility on approval routes



Once approved the engine will update transaction with a cancel or reschedule date



Return to Summary Viewing Results for ALL ITEMS

Action Exception Supply Demand

Perform Selected Actions Show: 50 of 1 of 1 Total: 9

ACTION	CHANGE ORDER	DATE	ITEM	LOCATION	QUANTITY	UNITS
Cancel unfirm Work Order #WO725 on 11/10/2020 due to no future requirements	Work Change Order #2	11/10/2020	ITEM_E_888	Pittsburgh Manufacturing_888	20	
Reschedule out unfirm Work Order #WO723 from 11/11/2020 to 11/12/2020	Work Change Order #1	11/11/2020	ITEM_D_888	Detroit Manufacturing_888	80	
Reschedule in unfirm Work Order #WO727 from 11/11/2020 to 11/09/2020	Work Change Order #3	11/11/2020	ITEM_G_888	Pittsburgh Manufacturing_888	40	

Supply Change Order Search: Results

Return To Criteria Edit this Search

FILTERS

STYLE Normal

TOTAL: 3

EDIT VIEW	INTERNAL ID	TRANSACTION	SUPPLY PLAN DEFINITION	ITEM	CHANGE ACTION	ORIGINAL DATE	NEW DATE	STATUS	MEMO
Edit View	1	Work Order #WO723	Plan_Def_888	ITEM_D_888	Reschedule Out	11/11/2020	11/12/2020	Pending Approval	
Edit View	2	Work Order #WO725	Plan_Def_888	ITEM_E_888	Cancel	11/10/2020		Pending Approval	
Edit View	3	Work Order #WO727	Plan_Def_888	ITEM_G_888	Reschedule In	11/11/2020	11/09/2020	Pending Approval	

Work Change Order

1 PENDING APPROVAL

Edit Back Approve Reject

TRANSACTION: Work Order #WO723
 SUPPLY PLAN DEFINITION: Plan_Def_888
 ITEM: ITEM_D_888

CHANGE ACTION: Reschedule Out
 ORIGINAL DATE: 11/11/2020
 CURRENT TRANSACTION DATE: 11/11/2020

NEW DATE: 11/12/2020
 APPROVAL STATUS: Pending Approval
 MEMO:

Workflow System Notes

Active Workflows Workflow History

VIEW: Default Customize View Refresh

WORKFLOW	CURRENT STATE	DATE ENTERED WORKFLOW	DATE ENTERED STATE	OPTIONS	STATUS	CANCEL

Edit Back Approve Reject

Bulk Change Order Approval

Easily approve multiple change orders on one page

Approve Supply Change Orders

Submit | **Reset** | **Mark All** | **Unmark All**

SUPPLY PLAN DEFINITION: Plan_Def_T1

ITEM: Standard_Bicycle_T1

LOCATION:

START DATE:

END DATE:

APPROVE	SUPPLY CHANGE ORDER	SUPPLY PLAN DEFINITION	TRANSACTION	ITEM	LOCATION	SOURCE LOCATION	CHANGE ACTION	ORIGINAL DATE	NEW DATE
<input checked="" type="checkbox"/>	Work Change Order #2	Plan_Def_T1	Work Order #1	Standard_Bicycle_T1	Detroit_MFG_T1		Reschedule In	10/12/2020	10/9/2020
<input checked="" type="checkbox"/>	Work Change Order #3	Plan_Def_T1	Work Order #2	Standard_Bicycle_T1	Detroit_MFG_T1		Reschedule In	10/14/2020	10/13/2020
<input checked="" type="checkbox"/>	Work Change Order #8	Plan_Def_T1	Work Order #10	Standard_Bicycle_T1	Pittsburgh_MFG_T1		Cancel	10/13/2020	

Submit | **Reset** | **Mark All** | **Unmark All**

REST/CSV

REST Exposure Provided For:

- Planning Item Category
- Planning Item Group
- Planning Rule Group
- Supply Plan Definition
- Planned Order
- Supply Change Order

CSV Exposure Provided For:

- Item
- Item Location Configuration
- Planning Item Category
- Planning Item Group
- Planning Rule Group
- Supply Plan Definition

Create Supply Orders

Order Items

Submit Reset

LOCATION: - All -

VENDOR: - All -

INCLUDE ITEMS WITH NO PREFERRED VENDOR
 INCLUDE ITEMS WHERE VENDOR IS NOT PREFERRED

PARENT ITEM: - All -

MINIMUM QUANTITY: _____

TO BE PRINTED
 TO BE EMAILED
 TO BE FAXED

Time Phased Items Reorder Point Items **Planned Orders** Blanket PO Items

ORDER START DATE: 09/01/2020 ORDER END DATE: 12/01/2020

Customize

	PLANNED ORDER #	SUPPLY PLAN DEFINITION	ORDER DATE	RECEIPT DATE	ITEM	DESCRIPTION	QUANTITY	UNITS	LOCATION	DEPARTMENT	CLASS
<input type="checkbox"/>	112	Plan_Def__1	10/03/2020	10/04/2020	ITEM_B__1 Centrifugal Pump B		100		Detroit Manufacturing__1		
<input type="checkbox"/>	1	Plan_Def__1	10/22/2020	10/23/2020	ITEM_H__1 Solar Inverter H		40		Pittsburgh Manufacturing__1		
<input type="checkbox"/>	3	Plan_Def__1	10/02/2020	10/02/2020	ITEM_H__1 Solar Inverter H		5		Detroit Manufacturing__1		

Mass Create Work Orders

Submit Reset

LOCATION: - All -

DEPARTMENT: _____ +

CLASS: _____ +

PARENT ITEM: _____

MINIMUM QUANTITY: _____

Time Phased Items Reorder Point Items **Planned Orders**

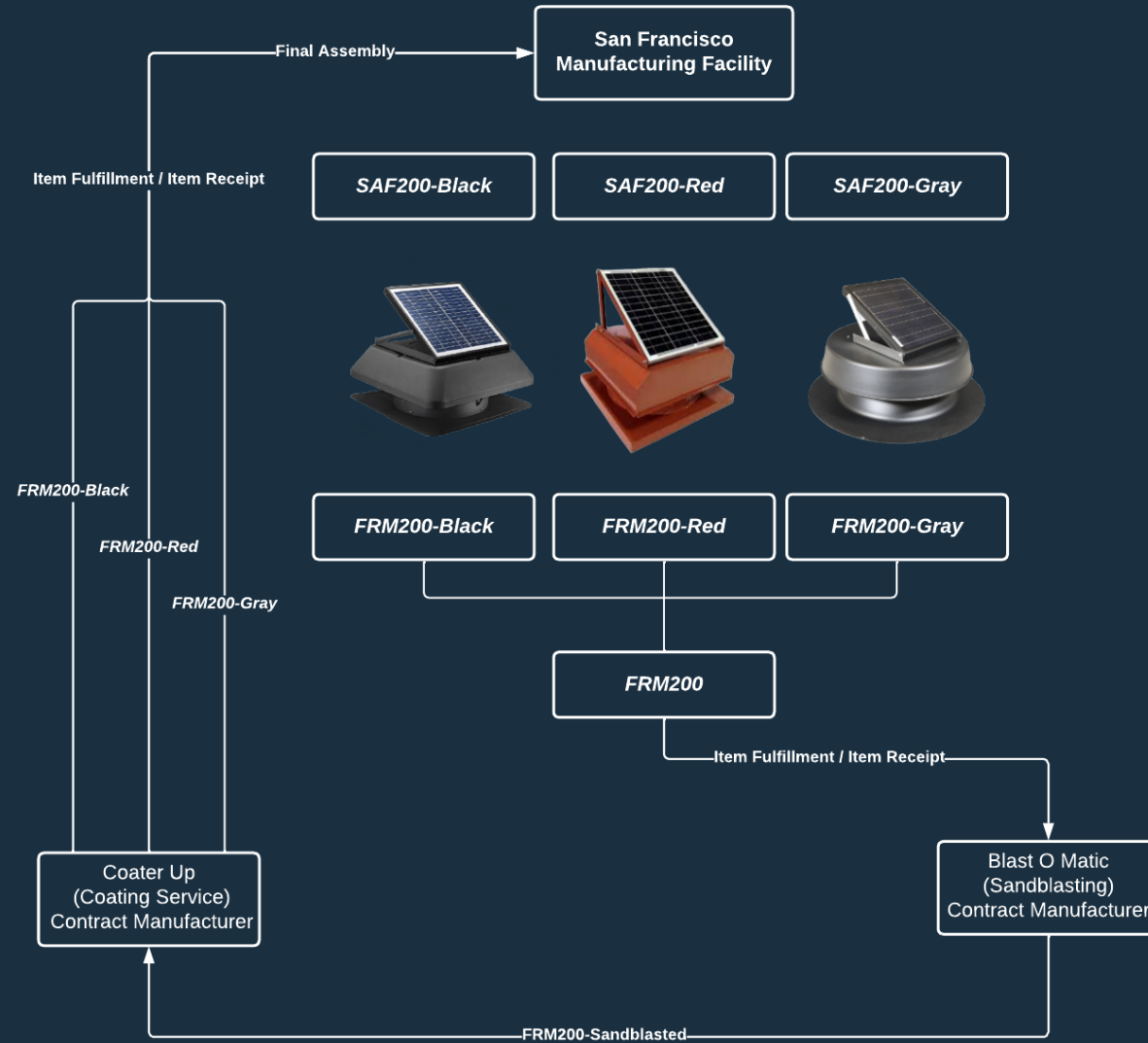
ORDER START DATE: 09/01/2020 ORDER END DATE: 11/07/2020

Customize Mark All Unmark All

ORDER	PLANNED ORDER #	SUPPLY PLAN DEFINITION	ORDER DATE	PRODUCTION END DATE	ITEM	DESCRIPTION	LOCATION	AVAILABLE	BACK ORDERED	ON ORDER	QUANTITY
<input type="checkbox"/>	111	Plan_Def__1	10/04/2020	10/04/2020	ITEM_E__1 Pump Control Panel		Detroit Manufacturing__1	0	210	0	140

Manage your planned Purchase Orders and Work Orders in one place to schedule and release

Material Planning with Outsourced Manufacturing



Item 360 SuiteApp

Item 360

- Provides real-time and concise overview on Item's transactions in one consolidated Dashboard
- Enables Visibility into Item's transactions across multiple Subsidiaries and Locations
- Item Alerts portlet for prompt informed decisions.
- Ability to access Item overview page from an Item record
- Requires a One World account



Costed Bill of Material SuiteApp

Costed Bill of Material

- View the comprehensive cost breakdown of an assembly item, including bills of materials, operations, and cost types based on selected bill of materials revision, routing and templates used
- Estimate the potential costs of manufacturing items for bill of materials based on costing method, purchase price and item default price
- Prerequisites:
 - The following features must be enabled in order to access Costed Bill of Materials
 - Advanced Bill of Materials
 - Assembly Items
 - Standard Costing
 - Advanced Item Location Configuration
- Application is free, no license charge. It will be included in all SuiteSuccess editions that include work order and assemblies from July 2023 onwards.
- Accounts can download from SuiteApp marketplace. Implementation wise, it replaces Costed BOM inquiry.

Costed Bill of Materials

More

Submit | Reset

SUBSIDIARY *
Headquarters : United States

DATE/EFFECTIVE DATE *
09/19/2023

TOP LEVEL ONLY

ITEM *
SAF300 Solar Attic Fan (SC) - 300 series

BILL OF MATERIALS REVISION *
Revision 1

MATERIAL COST
Per Costing Method

LOCATION *
San Francisco

BY MANUFACTURING ROUTING

BILL OF MATERIALS *
SAF300 Bom

MANUFACTURING ROUTING
SAF300-SF

DISPLAY CONTROL *
By Revision

BUILD QUANTITY
5

Material Costs Assembled Costs **Fully Exploded Costs**

Total Exploded Cost Exploded Cost Per Unit Material Cost % Conversion Cost %
\$706.74 **\$141.348 Each(1)** **51.34%** **48.66%**

ITEM NAME	LEVEL	MATERIAL COSTS	CONVERSION COSTS	LABOR RUN	LABOR RUN OVERHEAD	LABOR SETUP	LABOR SETUP OVERHEAD	MACHINE RUN	MACHINE RUN OVERHEAD	MACHINE SETUP	MACHINE SETUP OVERHEAD	TOTAL COST
SAF300	0	362.81	108.33	73.33		1.67		33.33				471.15
BLD300	1	41.25	0.00									41.25
CTL300	1	163.74	53.47	36.67		0.14		16.67				217.22
CTNLABL001	1	0.12	0.00									0.12
FRM300	1	12.15	169.54	29.33	53.13	0.00		57.08		15.00	15.00	181.69
FSP300	1	95.00	0.00									95.00
FWH300	1	0.55	0.00									0.55
HDCTN002	1	50.00	0.00									50.00
TOTALS		362.81	343.92	142.08	54.90	4.72	0.00	109.79	0.00	16.21	16.21	706.74

Work Instructions and Traveler SuiteApp

Work Instructions and Traveler Report

- Work Order Instructions report would be made available for customers with WIP and Routings features
- A new Subtab (Work Instructions) associated to a routing record
- Easier execution of WIP enabled work orders using instructions defined at every operation level in Routing
- Advanced manufacturing licensing is not required for printing of Work Instructions anymore
- Ability to view the work instructions within SCM Mobile (24. 1 release)



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