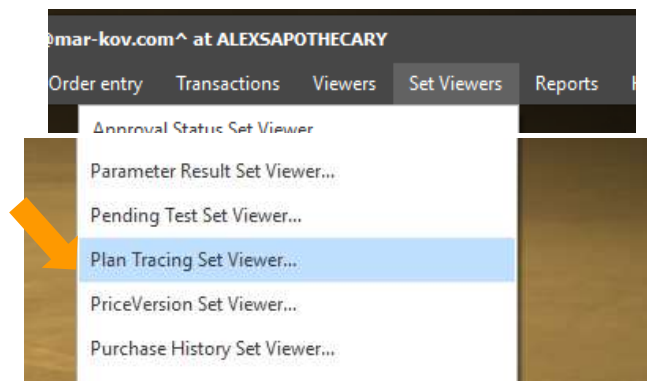


How to Plan Inventory Quantities

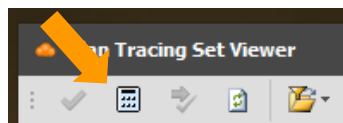
In Mar-Kov, you can plan what to purchase or manufacture based on demands for inventory (i.e. Sales Orders, Production Orders, and Minimum Stock Requirements) using the **Plan Tracing Set Viewer** and **Short Inventory Set Viewer**.

Plan Tracing Set Viewer

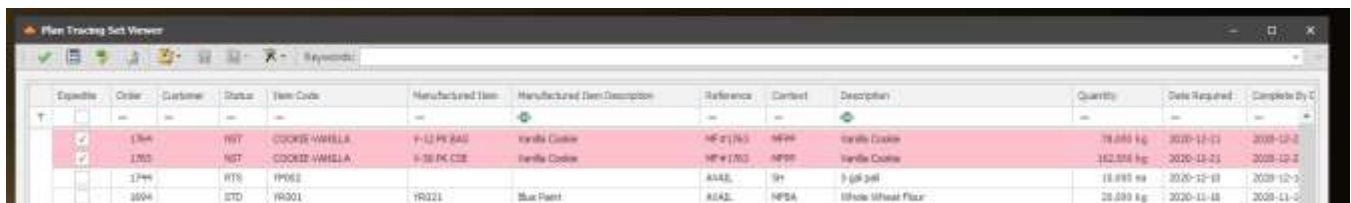
Access the Plan Tracing Set Viewer by Selecting *Set Viewers >> Plan Tracing Set Viewers*



Select the **Recalculate Plan Trace** icon to view the most up to date information on orders and inventory.



Each line in the **Plan Tracing Set Viewer** represents a requirement for inventory.



Expenses	Order	Customer	Status	Item Code	Manufactured Item	Manufactured Item Description	Reference	Context	Description	Quantity	Date Required	Complete By C
✓	1364		NOT	COOKIES-WHISLA	9-12 PK BAG	Vanilla Cookies	MP21763	MP21	Vanilla Cookies	79.888 kg	2020-12-01	2020-12-01
✓	1365		NOT	COOKIES-WHISLA	9-12 PK BAG	Vanilla Cookies	MP21763	MP21	Vanilla Cookies	162.888 kg	2020-12-01	2020-12-01
	1744		RTS	PP063			AA42	SH	9 gpk 360	18.888 kg	2020-12-01	2020-12-01
	2004		STD	YR001	YR001	Blue Paint	AA42	MP21	White Wheat Flour	28.888 kg	2020-12-01	2020-12-01

The **Order** column indicates the Order on which the original requirement exists.

Note: Requirements to fill minimum stock do not have an order number.

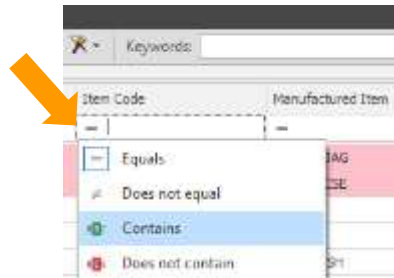
The **Context** column represents which order type the inventory is required for. The table below outlines what each term means.

Term	Description
MFBA	Batch Order
MFPK	Packaging Order
MFPP	Packaged Product (Demand in Batch Order)
SH	Shipping Order

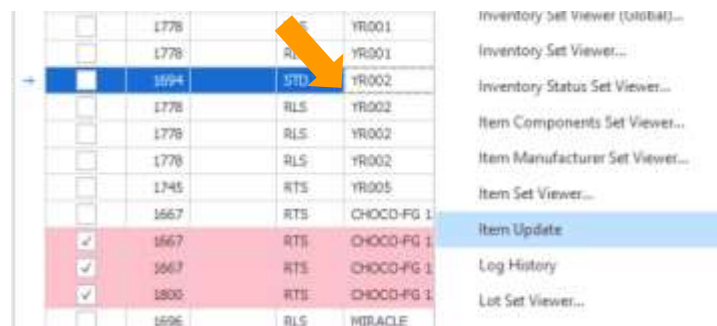
The **Reference** column represents how the inventory will be filled. The table below describes each reference term in the **Plan Tracing Set Viewer**.

Reference Term	Description
AVAIL	Inventory is filled from existing stock on hand.
Short	A new order is required to fill this requirement.
Hold	Inventory is filled from quarantined inventory. It is assumed that inventory will be approved and become available for use. A '+' at the end indicates testing has been in progress for more than the specified Testing Lead Time.
Expired	Inventory is filled from expired inventory or inventory that will expire before it is required. It is assumed that inventory will be approved and become available for use. A '+' at the end indicates testing has been in progress for more than the specified Testing Lead Time.
REJECTED	Inventory is filled from rejected inventory where the order specifies that specific subplot.
MF#<Source Order>	Inventory filled from an existing manufacturing order. A '+' at the end indicates that the order is late.
PO#<Source Order>	Inventory is filled from an existing purchase order. A '+' at the end indicates that the order is late.
Negative	The requirements caused the calculated inventory to go below zero. The value indicates the quantity to bring the inventory to zero or minimum stock.
<Area>-<Source Order>	Inventory is filled from a shipping order that is transferring inventory from the Area shown.
<Area>	Inventory is filled from inventory in the Area shown. A warehouse transfer is needed to make the inventory available.

As with all set viewers, you may filter any column by selecting the column filter and entering in the necessary information.



To obtain more information, you may Right Click the **Item Code** field and select the appropriate feature or program.



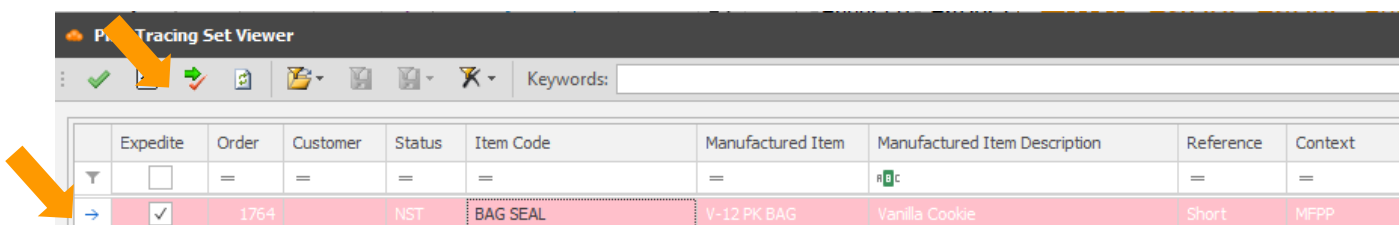
Note: The Plan Tracing Set Viewer prioritizes the inventory requirements based on the date the production order requires it. The Plan Tracing Set Viewer will also account for situations in which a specific lot number or manufacturer must be used in the production process.

Creating a Purchase Order for Short Inventory

Within the **Plan Tracing Set Viewer**, you may expedite purchasing inventory that is short.

Prerequisite: The Item must have a preferred supplier or exist in a Price Version.

Select the line where inventory is short. Then, Select the **Create Purchase Order** icon.

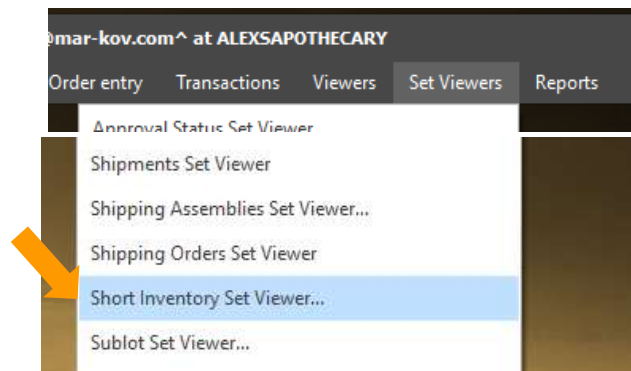


Proceed to create the Purchase Order.

Short Inventory Set Viewer

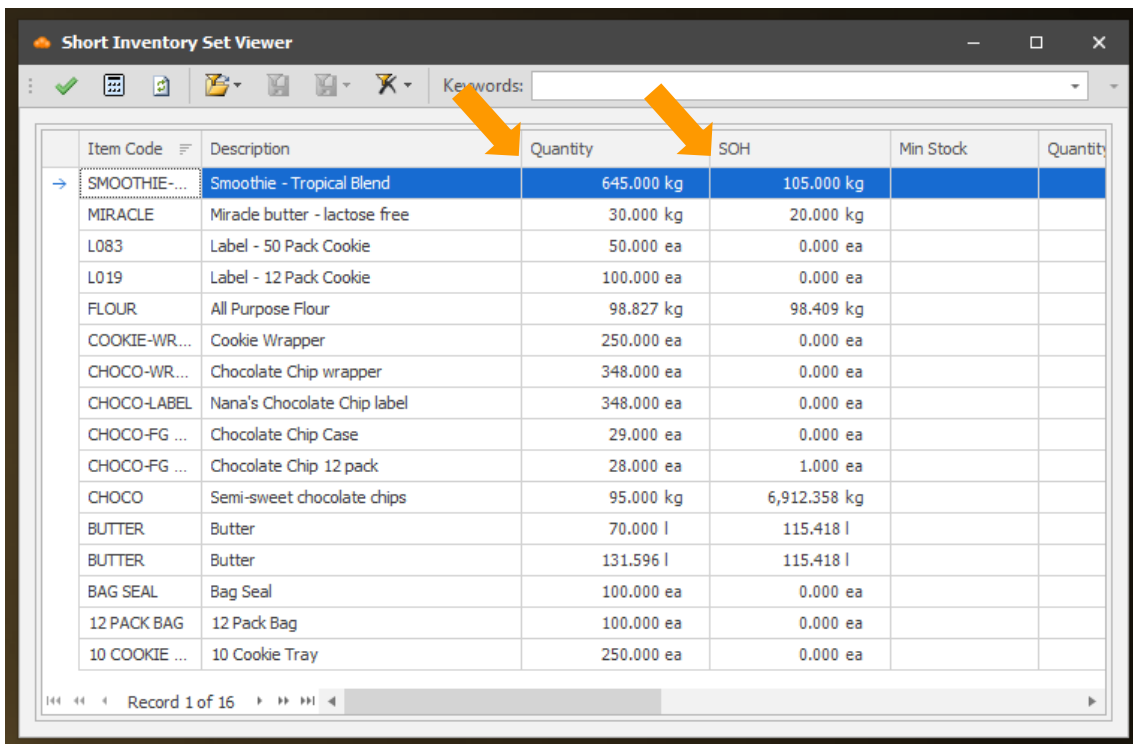
The **Short Inventory Set Viewer** presents a summary of the short inventory listed in the **Plan Tracing Set Viewer**.

Access the Short Inventory Set Viewer by Selecting *Set Viewers >> Short Inventory Set Viewers*



The **Quantity** column represents the total quantity needed for that item to fulfill order requirements.

Note: The **Quantity** field already accounts for the **SOH (Stock on Hand)** and **Min Stock** fields.



Item Code	Description	Quantity	SOH	Min Stock	Quantity
SMOOTHIE-...	Smoothie - Tropical Blend	645.000 kg	105.000 kg		
MIRACLE	Miracle butter - lactose free	30.000 kg	20.000 kg		
L083	Label - 50 Pack Cookie	50.000 ea	0.000 ea		
L019	Label - 12 Pack Cookie	100.000 ea	0.000 ea		
FLOUR	All Purpose Flour	98.827 kg	98.409 kg		
COOKIE-WR...	Cookie Wrapper	250.000 ea	0.000 ea		
CHOCO-WR...	Chocolate Chip wrapper	348.000 ea	0.000 ea		
CHOCO-LABEL	Nana's Chocolate Chip label	348.000 ea	0.000 ea		
CHOCO-FG ...	Chocolate Chip Case	29.000 ea	0.000 ea		
CHOCO-FG ...	Chocolate Chip 12 pack	28.000 ea	1.000 ea		
CHOCO	Semi-sweet chocolate chips	95.000 kg	6,912.358 kg		
BUTTER	Butter	70.000 l	115.418 l		
BUTTER	Butter	131.596 l	115.418 l		
BAG SEAL	Bag Seal	100.000 ea	0.000 ea		
12 PACK BAG	12 Pack Bag	100.000 ea	0.000 ea		
10 COOKIE ...	10 Cookie Tray	250.000 ea	0.000 ea		

The Planning Process

To best plan for what to purchase or manufacture based on demands for inventory, follow the steps below:

1. For each line that is "Short", create a Manufacturing or Purchase Order that will provide the inventory before the day it's needed.
2. Any needs that won't be met in time are flagged as Expedite (and shown in red) meaning that order needs to be done sooner.
3. Work backwards from production for the Finished Goods, to production of Bulk/Intermediate products to purchasing of Raw Materials.