

# February User Group Meeting

February 19, 2026

# UG Meeting Agenda

Introductions – Chris Warren

Summit Update – Michael Konstas, Leanne Paul, Elizabeth McQuiston, Andrew Good

Upcoming Events – Angela Holland, Shawn Dorward, Blaine Pennypacker, David Laster

## Educational Sessions:

- **Linking the Chain with Subcontracting in Business Central – Jenn Claridge**
- **How to Impress your Boss with List Reporting in Business Central – Jo deRuiter**

Open Forum – Chris Warren

# 2026 Board Members



**Chris Warren**  
Chair



**Meenakshi Singh**  
Co-Chair



**Lewis Rosenberg**  
All-Stars



**Angela Holland**  
Learner's



**Blaine Pennypacker**  
Webinars



**Elizabeth McQuiston**  
Summit



**Brad Prendergast**  
Microsoft Liaison



**Mark Rhodes**  
Digital Presence



**Shawn Dorward**  
Learner's



**David Laster**  
Webinars



**Andrew Good**  
Summit



**Leanne Paul**  
Summit Emeritus

# Summit Update



**Leanne Paul**  
Summit Chair Emeritus



**Elizabeth McQuiston**  
Summit Chair



**Andrew Good**  
Summit Chair

## Total Registrations:

840 as of 2/14

Slightly higher vs Last year

BC Installed 460 attendees

**BC Primary 360 attendees**

**350 Users Registered**

## **Sponsors showcasing their products**

230 as of 2/15

Targeted for up to 290

## **up to 10 BC specific Academy + AI Microsoft Pre- Day**

40 Academy classes including Copilot Classes with registration to open by 3/2



### **CALL FOR SPEAKERS IS OPEN!**

Share your expertise with thousands of Microsoft Business Applications professionals

**Speaker get free access to Summit**

### **TECH MEDIC HELP DESKS**

Expert users per Microsoft Dynamics & Power Platform products to answer questions & solve problems

### **500+ SPEAKERS**

Microsoft expert users to deliver tips, tricks, how-to & tutorial sessions across 700+ sessions

### **RECEPTIONS & MEALS INCLUDED**

All sanctioned meals, including breakfast, lunch, show floor receptions and the exclusive Grand Ole Opry concert are included in your pass

### **5,500+ ATTENDEES**

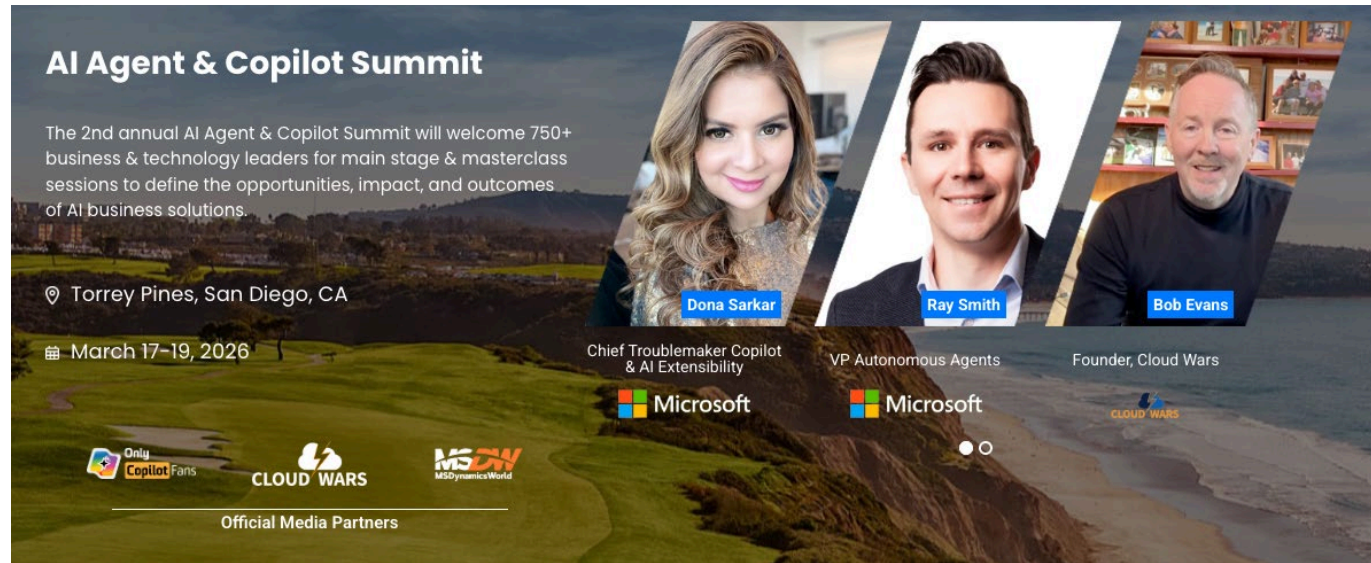
Microsoft users across finance, IT, business admin, supply chain, sales & operations

### **260+ PARTNERS**

Access to trusted Microsoft consultant, systems integrator & ISV Partners on the show floor

### **MICROSOFT LEADERSHIP**

Keynotes, General Sessions and training from Microsoft leadership in AI, Dynamics, Power Platform, Fabric & more.



An AI-first event to define the opportunities, impact and outcomes possible with Microsoft Agents & Copilot for mid-market & enterprise companies.

- 600+ Attendees confirmed as of 2/15 on track for 700+
- 40 sponsor partner and ISV in attendance
- 80 speakers/80+ sessions
- Track for Agents & Copilot in BC, with several BC experts in attendance
- Golf and pickleball outings at Torrey Pines and the hotel

### The All-Access Attendee Pass will provide:

- All meals throughout the event
- Access to all main stage & breakout master classes
- All receptions and networking events
- BONUS: following the event you will receive video links to view ALL SESSIONS from the event on-demand

Take advantage of of a special 20% off Standard pricing

[Register](#)

# Learners and Webinar Update



**Angela Holland**  
Learners Chair



**Blaine Pennypacker**  
Webinar Program



***Shawn Dorward***  
*Learners Chair*



**David Laster**  
Webinar Program



The Learners Community enables the Microsoft Business Applications community to connect, discuss and collaborate through online and in person events and discussions.

## What you Will Get:

Joining Groups and Participating in Events

### Join a Local Groups

Joining a community group in your area helps you connect with like-minded individuals and build relationships.

### Explore Local Events

Attend local events to engage with your community and participate actively in diverse activities.

### Virtual Event Participation

Virtual events offer accessible ways to connect and participate regardless of location or schedule.

**MICROSOFT Creators:** Leadership, Strategic Planning, Product innovation and User and Seller Support

#### **Buyers: Education & Networking**

**Audience:** Buyers and users of enterprise software like D365 that seek relevant education and networking opportunities.

**Peer-led Learning** that provides practical knowledge sharing among users to enhance technology adoption.

**Networking** helps users connect and exchange experiences, boosting confidence in technology use.

#### **Community Leaders The Connection**

**Volunteer** to unite people through shared goals and experiences.

Leaders drive **Innovation** to solve community challenges.

**Education and training** empower members to contribute effectively to the community.

#### **Sellers: Partners, ISVs, Sis & MVPs**

**Partners** collaborate with businesses to implement AI-driven solutions and foster digital transformation.

**ISVs** develop innovative AI applications enhancing business processes.

**Systems Integrators** enable seamless integration of AI and business technologies across platforms.

**MVPs** advocate AI adoption and share expertise to accelerate business transformation.

# Upcoming Learners Events

## Roadshows

Tampa (Supply Chain Management & AI) Feb 19, 2026
Washington, D.C. (Manufacturing) Feb 24, 2026
Atlanta (Supply Chain Management) Feb 25, 2026
Houston (IT) Mar 5, 2026
Seattle (AI) Apr 7, 2026
Vancouver (AI) Apr 9, 2026
Toronto (Business Central, AI) Apr 14, 2026
Montreal (SMB) Apr 16, 2026
Chicago May 5, 2026
Charlotte (Accounting/Finance) Jun 9, 2026
Pittsburgh (Manufacturing) Jun 23, 2026
Cleveland (Manufacturing) Jun 25, 2026

## National User Group Meetings

19-MAR	Cari Corozza	Your Business Central Reporting Roadmap
	Kim Dallefeld	Financial Reporting
16-APR	Ben Baxter	Planning (MRP/MPS): Where to start and how to dial in the results!
	Andrew Good	What's New in BC 2026 Wave 2: Leveraging the Microsoft Stack with your Business Central application
14-MAY	Gwendolynn Stearns	How to leverage the Excel, Word, Outlook integrations with BC (and more!)
	David Stevenson	Solving BC Integration Challenges with Azure Functions

# Upcoming Webinars

- 3/5: AI in Business Central for Dummies with Steve Chinsky

Looking for late March and April speakers – touch base with Blaine and David if you have a topic to share!

**SIGN UP FOR LEARNERS AND CHOOSE A REGION!**



A screenshot of the Learners website interface. At the top right, there are navigation links for "GROUPS", "MEETINGS", and "ENGAGE". The main content area displays the "Southeast US Business Central Learners" group page. The page features the Learners logo and tagline. Below this, it says "Business Central BC/NAV - Southeast US" with a prominent blue "Join" button. A "Share" button is also visible at the bottom left of the page.

# Linking the Chain with Subcontracting in Business Central

Jenn Claridge



- ▶ Started as an end user in 2005 migrating from a DOS based system
- ▶ Started in consulting in 2008 and now a Microsoft MVP
  - ▶ Visual Mfg
  - ▶ GP
  - ▶ NAV/BC
- ▶ Areas of expertise
  - ▶ Supply Chain
  - ▶ Warehousing
  - ▶ Production/Manufacturing
  - ▶ Projects
  - ▶ Service Orders
- ▶ Live in an 1883 Schoolhouse

**JENN CLARIDGE**  
**VICE PRESIDENT OF OPERATIONS**  
**SABRE LIMITED | MICROSOFT MVP**

**Subcontracting is a business practice in which a company hires another company or individual (the subcontractor) to perform a specific portion of Production.**

**It's a common approach in manufacturing where specialized expertise, capacity, or cost efficiency is needed.**

Anodizing    **Painting**    Heat Treat  
Powder Coating

# When Should You Use Subcontracting?

- Your facility lacks the capacity for a specific process.
- A specialized service (e.g., powder coating or anodizing) is better handled by a third party.
- You need to manage seasonal or overflow demand.

# Setting up Subcontracting Work Centers

## Posting Fast Tab

### Unit Cost Calculation

- Set up as Units – Usually
- Cost generated per unit instead of a measurement of time

### Specific Unit Cost

If toggled to true, the cost is item specific and set up on the routing line

Dynamics 365 Business Central

Work Center Card

HEATTREAT · Heat Treating

Home Work Center Related Reports Automate Fewer options

Load Calendar Absence

**General**

No. HEATTREAT Work Center Group Code Search Name HEAT TREATING

Name Heat Treating Alternate Work Center Blocked

Last Date Modified

**Posting**

Direct Unit Cost 0.00 Unit Cost 0.00 Customergroup Code

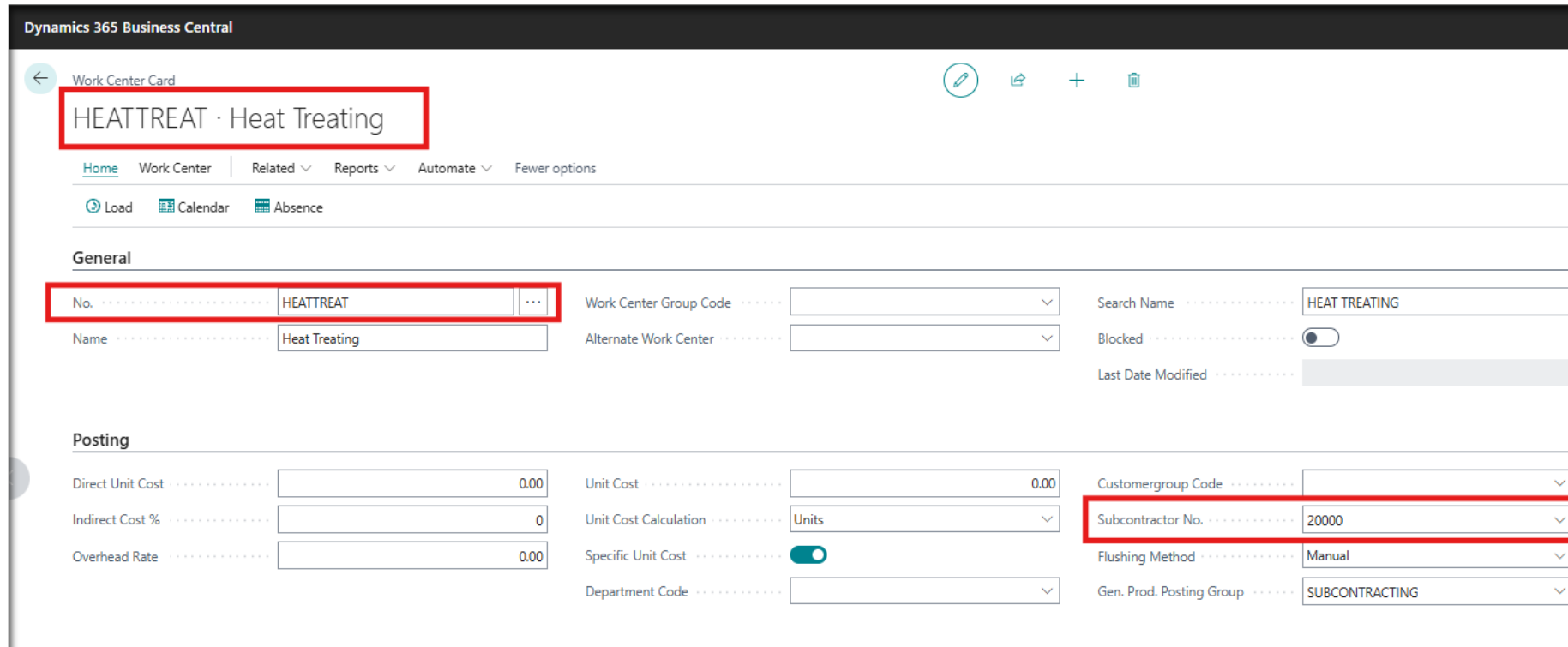
Indirect Cost % 0 Unit Cost Calculation Units Subcontractor No. 20000

Overhead Rate 0.00 Specific Unit Cost  Flushing Method Manual

Department Code Gen. Prod. Posting Group SUBCONTRACTING

## Posting Fast Tab

- Subcontractor No.
- Links the work center to the vendor who does the subcontracted work - for PO creation

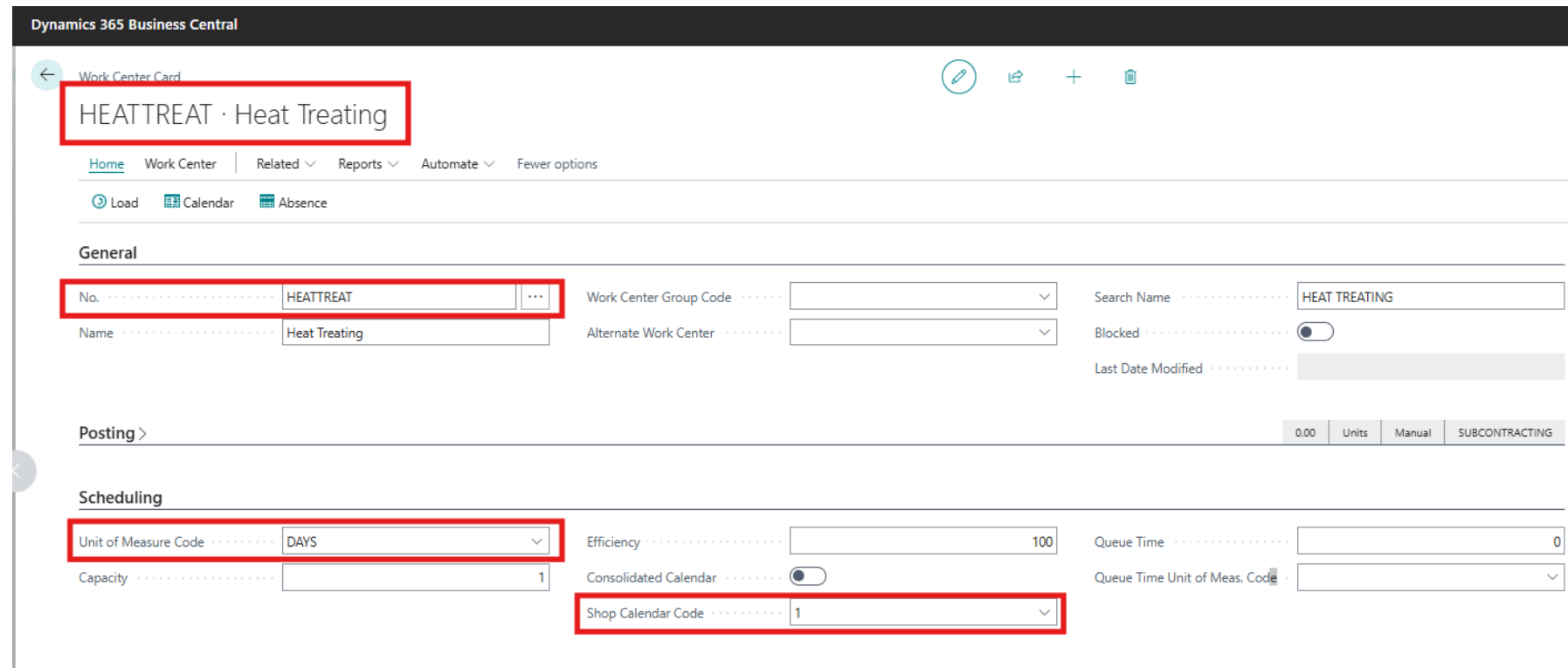


The screenshot shows the Dynamics 365 Business Central interface for a Work Center Card. The card is titled "HEATTREAT · Heat Treating". The "General" section includes fields for "No." (HEATTREAT), "Name" (Heat Treating), "Work Center Group Code", "Search Name" (HEAT TREATING), "Alternate Work Center", "Blocked" (toggle), and "Last Date Modified". The "Posting" section includes fields for "Direct Unit Cost" (0.00), "Indirect Cost %" (0), "Overhead Rate" (0.00), "Unit Cost" (0.00), "Unit Cost Calculation" (Units), "Specific Unit Cost" (toggle), "Department Code", "Customergroup Code", "Subcontractor No." (20000), "Flushing Method" (Manual), and "Gen. Prod. Posting Group" (SUBCONTRACTING). Red boxes highlight the "No." field, the "Subcontractor No." field, and the "HEATTREAT · Heat Treating" title.

# SETTING UP SUBCONTRACTING WORK CENTERS

## Scheduling Fast Tab

- Unit of Measure Code  
Set up as days - usually (unit of time the product will be at the subcontractor)
- Shop Calendar Code  
This is specific to the vendor hours of operation



The screenshot shows the 'Work Center Card' for 'HEATTREAT - Heat Treating' in Dynamics 365 Business Central. The card is divided into several sections: General, Posting, and Scheduling. The 'General' section includes fields for 'No.' (HEATTREAT), 'Name' (Heat Treating), 'Work Center Group Code', 'Search Name' (HEAT TREATING), 'Alternate Work Center', and 'Blocked' (toggle). The 'Posting' section shows '0.00 Units Manual SUBCONTRACTING'. The 'Scheduling' section includes 'Unit of Measure Code' (DAYS), 'Efficiency' (100), 'Queue Time' (0), 'Capacity' (1), 'Consolidated Calendar' (toggle), and 'Shop Calendar Code' (1). Red boxes highlight the 'No.' field, 'Unit of Measure Code' field, and 'Shop Calendar Code' field.

Dynamics 365 Business Central

Work Center Card

HEATTREAT · Heat Treating

Home Work Center Related Reports Automate Fewer options

Load Calendar Absence

**General**

No. HEATTREAT Work Center Group Code Search Name HEAT TREATING

Name Heat Treating Alternate Work Center Blocked

Last Date Modified

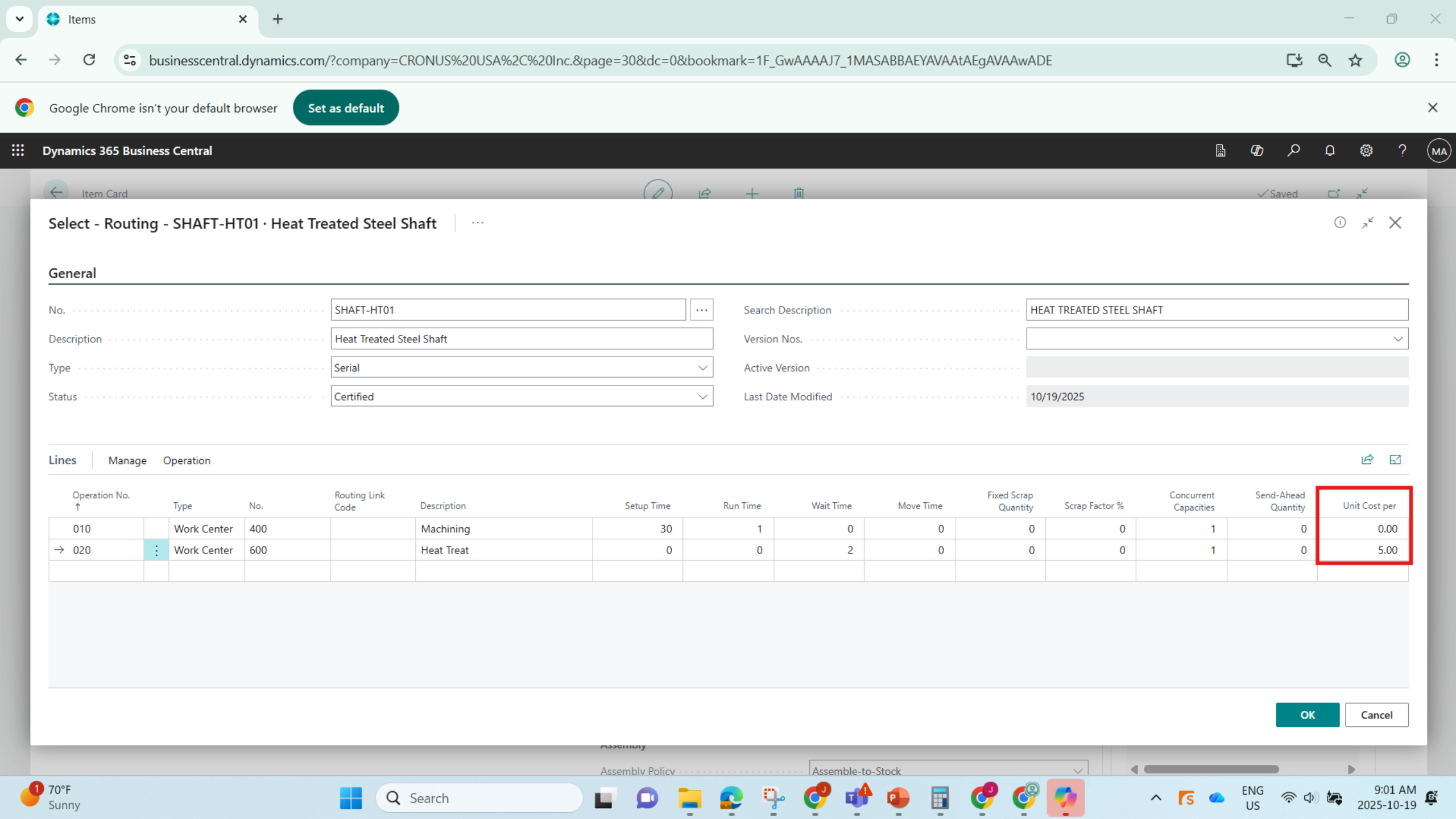
**Posting** > 0.00 Units Manual SUBCONTRACTING

**Scheduling**

Unit of Measure Code DAYS Efficiency 100 Queue Time 0

Capacity 1 Consolidated Calendar Queue Time Unit of Meas. Code

Shop Calendar Code 1



Select - Routing - SHAFT-HT01 · Heat Treated Steel Shaft

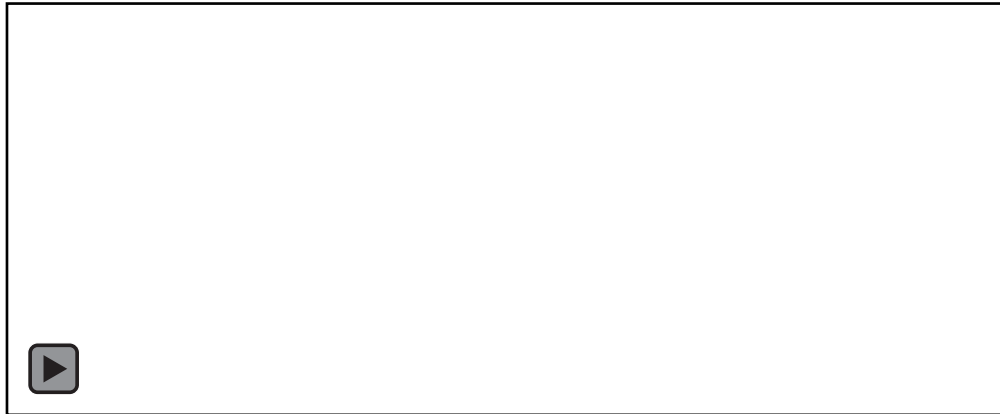
General

No.	SHAFT-HT01	Search Description	HEAT TREATED STEEL SHAFT
Description	Heat Treated Steel Shaft	Version Nos.	
Type	Serial	Active Version	
Status	Certified	Last Date Modified	10/19/2025

Lines | Manage | Operation

Operation No. ↑	Type	No.	Routing Link Code	Description	Setup Time	Run Time	Wait Time	Move Time	Fixed Scrap Quantity	Scrap Factor %	Concurrent Capacities	Send-Ahead Quantity	Unit Cost per
010	Work Center	400		Machining	30	1	0	0	0	0	1	0	0.00
→ 020	Work Center	600		Heat Treat	0	0	2	0	0	0	1	0	5.00

OK Cancel



- **Wait Time** - number of days(time) before you can expect items back from the subcontractor
- **Unit Cost per** - this is where you enter the unit cost when it is specific to the routing and not to the work center in general

This is  
pretty  
typical  
setup for  
most  
scenarios.



# Let's explore common Subcontract processes via User Stories





As a [role],  
I want to [do something],  
so that [I achieve this goal].

This keeps the focus on who, what, and why

**As a Production Planner,  
I want to assign a subcontract work centre to a routing  
operation,  
so that Business Central suggests a purchase order when I need  
to send parts for a production order.**

This story clearly identifies:

**Who:** Production Planner

**What:** Assign subcontract vendor

**Why:** Automate PO creation

# USER STORY 1- SUBCONTRACT WORKSHEET



**As a Production Planner,**



**I want Business Central to link a subcontract purchase order to the corresponding production order and work centre**



**so that the vendor cost, routing step, and capacity are all tracked within the same job.**



**DEMAND**

# S-ORD101016 · Krowmat Inc

Notifications: 3 *The available inventory for item SHAFT-HT01 is lower than the entered quantity at this location. | This customer has an overdue balance. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.*

Home Prepare Print/Send Request Approval Order Report Actions Related Automate Fewer options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

## General Show more

External Document No. <input type="text" value="965326"/>	Requested Delivery Date <input type="text" value="11/15/2025"/>	<b>Work Description</b>
Document Date <input type="text" value="10/19/2025"/>	<b>Sell-to</b>	Posting Date <input type="text"/>
Order Date <input type="text" value="10/19/2025"/>	Customer Name <input type="text" value="Krowmat Inc"/>	Status <b>Open</b>
	Contact <input type="text" value="Meagan Bond"/>	

## Lines Manage

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Shipment Date	Department Code	Customergro... Code
→ Item	SHAFT-HT01	Heat Treated Steel Shaft	MAIN	100	PCS	10.00	1,000.00	100	-	100	-	11/15/2025	SALES	LARGE

Subtotal Excl. Tax (USD) <input type="text" value="1,000.00"/>	Invoice Discount % <input type="text" value="0"/>	Total Tax (USD) <input type="text" value="0.00"/>
Inv. Discount Amount Excl. Tax (US... <input type="text" value="0.00"/>	Total Excl. Tax (USD) <input type="text" value="1,000.00"/>	Total Incl. Tax (USD) <input type="text" value="1,000.00"/>

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**SUPPLY**

Released Production Order



✓ Saved

# 101015 · Heat Treated Steel Shaft

Home | Print | Order | Actions | Related | Reports | Automate | Fewer options

Change Status... Refresh Production Order... Create Inventory P...ay/Pick/Movement... Create Warehouse Pick Update Unit Cost... Replan...

## General Show less

No. ....	<input type="text" value="101015"/>	...	Source No. ....	<input type="text" value="SHAFT-HT01"/>	Assigned User ID .....	<input type="text"/>
Description .....	<input type="text" value="Heat Treated Steel Shaft"/>	Search Description .....	<input type="text" value="HEAT TREATED STEEL SHAFT"/>	Blocked .....	<input checked="" type="checkbox"/>	
Description 2 .....	<input type="text"/>	Quantity .....	<input type="text" value="100"/>	Last Date Modified .....	<input type="text" value="10/19/2025"/>	
Source Type .....	<input type="text" value="Item"/>	Due Date .....	<input type="text" value="11/15/2025"/>	Reopened .....	<input type="checkbox"/>	
				Manual Scheduling .....	<input type="checkbox"/>	

Lines | [Manage](#) | Functions | Line

New Line Delete Line

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.	Unit Cost	Cost Amount
→ SHAFT-HT01	11/15/2025	Heat Treated Steel Shaft	11/11/2025 8:50 PM	11/14/2025 3:00 AM	100	PCS	0	100	SHAFT-HT01	SHAFT-HT01	0.00	0.00

Schedule > 11/11/2025 8:50 PM 11/14/2025 3:00 AM

Released Production Order



✓ Saved

# 101015 · Heat Treated Steel Shaft

[Home](#) | [Print](#) | [Order](#) | [Actions](#) | [Related](#) | [Reports](#) | [Automate](#) | [Fewer options](#)

- [Change Status...](#)
- [Refresh Production Order...](#)
- [Create Inventory P...ay/Pick/Movement...](#)
- [Create Warehouse Pick](#)
- [Update Unit Cost...](#)
- [Replan...](#)

## General Show less

No. ....	<input type="text" value="101015"/>	...	Source No. ....	<input type="text" value="SHAFT-HT01"/>	Assigned User ID .....	<input type="text"/>
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Lines | [Manage](#) | [Functions](#) | [Line](#)

- [New Line](#)
- [Delete Line](#)

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[Schedule >](#)

11/11/2025 8:50 PM | 11/14/2025 3:00 AM

Released Production Order



✓ Saved

# 101015 · Heat Treated Steel Shaft

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[Change Status...](#) [Refresh Production Order...](#) [Create Inventory P...ay/Pick/Movement...](#) [Create Warehouse Pick](#) [Update Unit Cost...](#) [Replan...](#)

## General Show less

No. ....	<input type="text" value="101015"/>	...	Source No. ....	<input type="text" value="SHAFT-HT01"/>	Assigned User ID .....	<input type="text"/>
Description .....	<input type="text" value="Heat Treated Steel Shaft"/>	Search Description .....	<input type="text" value="HEAT TREATED STEEL SHAFT"/>	Blocked .....	<input checked="" type="checkbox"/>	
Description 2 .....	<input type="text"/>	Quantity .....	<input type="text" value="100"/>	Last Date Modified .....	<input type="text" value="10/19/2025"/>	
Source Type .....	<input type="text" value="Item"/>	Due Date .....	<input type="text" value="11/15/2025"/>	Reopened .....	<input type="checkbox"/>	
				Manual Scheduling .....	<input type="checkbox"/>	

Lines | [Manage](#) | [Functions](#) | **Line**

[New Line](#) [Delete Line](#)

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.	Unit Cost	Cost Amount
→ SHAFT-HT01	11/15/2025	Heat Treated Steel Shaft	11/11/2025 8:50 PM	11/14/2025 3:00 AM	100	PCS	0	100	SHAFT-HT01	SHAFT-HT01	0.00	0.00

**Schedule** > 11/11/2025 8:50 PM 11/14/2025 3:00 AM

Released Production Order



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# 101015 · Heat Treated Steel Shaft

[Home](#) | [Print](#) | [Order](#) | [Actions](#) ▾ | [Related](#) ▾ | [Reports](#) ▾ | [Automate](#) ▾ | [Fewer options](#)

[Change Status...](#) | [Refresh Production Order...](#) | [Create Inventory P...ay/Pick/Movement...](#) | [Create Warehouse Pick](#) | [Update Unit Cost...](#) | [Replan...](#)

## General Show less

No. ....	<input type="text" value="101015"/>	...	Source No. ....	<input type="text" value="SHAFT-HT01"/>	Assigned User ID .....	<input type="text"/>
Description .....	<input type="text" value="Heat Treated Steel Shaft"/>		Search Description .....	<input type="text" value="HEAT TREATED STEEL SHAFT"/>	Blocked .....	<input checked="" type="checkbox"/>
Description 2 .....	<input type="text"/>		Quantity .....	<input type="text" value="100"/>	Last Date Modified .....	<input type="text" value="10/19/2025"/>
Source Type .....	<input type="text" value="Item"/>	▾	Due Date .....	<input type="text" value="11/15/2025"/>	Reopened .....	<input type="checkbox"/>
					Manual Scheduling .....	<input type="checkbox"/>

Lines | [Manage](#) | [Functions](#) | [Line](#)

[Item Availability by](#) ▾ | [Reservation Entries](#) | [Dimensions](#) | [Routing](#) | [Components](#) | [Attachments](#) | [Item Tracking Lines](#) | [Production Journal](#)

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.	Unit Cost	Cost Amount
→ SHAFT-HT01	11/15/2025	Heat Treated Steel Shaft	11/11/2025 8:50 PM	11/14/2025 3:00 AM	100	PCS	0	100	SHAFT-HT01	SHAFT-HT01	0.00	0.00

**Schedule** > 11/11/2025 8:50 PM | 11/14/2025 3:00 AM

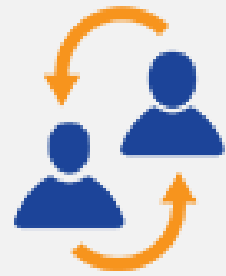
Routing

### Prod. Order Routing - 101015 Heat Treated Steel Shaft SHAFT-HT01

+ New Edit List Delete Line Order Tracking

Operation No. ↑	Type	No.	Description	Flushing Method	Starting Date-Time	Ending Date-Time	Setup Time	Run Time	Wait Time	Move Time	Routing Link Code
→ 010	Work Center	400	Machining	Manual	11/11/2025 8:50 PM	11/11/2025 11:00 PM	30	1	0	0	
020	Work Center	600	Heat Treat	Manual	11/12/2025 3:00 AM	11/14/2025 3:00 AM	0	0	2	0	

Close



**Dynamics**  
**Communities**

**LINKING THE  
PURCHASE SUPPLY**

Subcontracting Worksheets

Name ..... DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Accept Action Messa...	Action Message	Prod. Order No.	Operation No.	Work Center No.	Description	Quantity	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
→		<input type="checkbox"/>						0				0.00	

Description

Buy-from Vendor Name

Name ..... DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Accept Action Messa...	Action Message	Prod. Order No.	Operat	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
→		<input type="checkbox"/>							0.00	

### Calculate Subcontracts

**Filter: Work Center**

× No. ....

× Subcontractor No. ....

+ Filter...

Filter totals by:

+ Filter...

**Filter: Prod. Order Routing Line**

× Prod. Order No. ....

× Starting Date ....

+ Filter...

**OK** Cancel

Description

Buy-from Vendor Name

Subcontracting Worksheets

Name ..... DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Accept Action Messa...	Action Message	Prod. Order No.	Operation No.	Work Center No.	Description	Quantity	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
Item	SHAFT-HT01	<input checked="" type="checkbox"/>	New	101015	020	600	Heat Treat	100	PCS	30000		5.00	11/14/2025
→ Item		<input type="checkbox"/>						0				0.00	

Description

Buy-from Vendor Name

Subcontracting Worksheets

Name ..... DEFAULT

Manage Home Line More options

Calculate Subcontracts... **Carry Out Action Message...**

Type	No.	Accept Action Messa...	Action Message	Prod. Order No.	Operation No.	Work Center No.	Description	Quantity	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
Item	SHAFT-HT01	<input checked="" type="checkbox"/>	New	101015	020	600	Heat Treat	100	PCS	30000		5.00	11/14/2025
→ Item		<input type="checkbox"/>						0				0.00	

Description

Buy-from Vendor Name

Subcontracting Worksheets

Name ..... DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Accept Action Messa...	Action Message	Prod. Order No.	Operat	Unit of Measure	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
Item	SHAFT-HT01	<input checked="" type="checkbox"/>	New	101015	020	CS	30000		5.00	11/14/2025
→ Item		<input type="checkbox"/>							0.00	

### Carry Out Action Msg. - Req.

Use default values from ..... Last used options and filters

**Options**

Print Orders .....

OK Cancel

Description

Buy-from Vendor Name

Subcontracting Worksheets

Name: DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Accept Action Messa...	Action Message	Prod. Order No.	Operat	Unit of Measure	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
Item	SHAFT-HT01	<input checked="" type="checkbox"/>	New	101015	020	CS	30000		5.00	11/14/2025
Item		<input type="checkbox"/>							0.00	

**Carry Out Action Msg. - Req.**

Use default values from: Last used options and filters

**Working on it...**

- Worksheet Name DEFAULT
- Checking worksheet lines 1
- Creating purchase orders 1
- Creating purchase lines 1
- Deleting worksheet lines

OK Cancel

Subcontracting Worksheets

Name: ..... DEFAULT

Manage Home Line | More options

Calculate Subcontracts... | Carry Out Action Message...

Type	No.	Accept Action Messa...	Action Message	Prod. Order No.	Operation No.	Work Center No.	Description	Quantity	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
→ Item		<input type="checkbox"/>						0				0.00	

Description

Buy-from Vendor Name

Headline

# Want to learn more about Business Central?

Actions

- + Transfer Order
- + Purchase Order
- + Inventory Pick
- + Whse. Shipment
- + Whse. Receipt
- > Edit Item Reclassification Journal
- > Item Tracing
- > Order Status
- > Sales Order Shipping
- Power BI Reports
- Warehouse Bin List
- Physical Inventory List
- Customer Labels

### User Tasks

#### My User Tasks

Pending User Tasks

0

>

### Email Status

#### Email Activities

Failed Emails in Outbox	Draft Emails in Outbox	Sent Emails Last 30 Days
0	0	0
>	>	>

### Activities

Outbound - Today		Inbound - Today		Internal
Released Sales... Until Today	Posted Sales S... - Today	Expected Purc... Until Today	Posted Purch. ... - Today	Inventory Picks... Today
0	1	8	2	0
>	>	>	>	>

No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Location Code	Document Date	Status	Amount	Amount Including Tax
106002	20000	First Up Consultants		4/6/2025	Open	2,104.20	2,167.33
106003	40000	Wide World Importers		4/10/2025	Open	10,928.40	11,256.25
106004	30000	Graphic Design Institute		5/1/2025	Open	3,660.80	3,770.62
106005	50000	Nod Publishers		4/8/2025	Open	946.00	946.00
106006	20000	First Up Consultants	YELLOW	6/1/2024	Open	0.00	0.00
106007	20000	First Up Consultants	YELLOW	6/1/2024	Open	0.00	0.00
106008	20000	First Up Consultants	WHITE	6/1/2024	Open	30.00	30.00
106009	20000	First Up Consultants		3/1/2024	Released	16,000.00	16,000.00
106010	20000	First Up Consultants		3/1/2024	Released	64,470.00	64,470.00
106011	40000	Wide World Importers		3/1/2024	Released	3,035.00	3,035.00
106012	40000	Wide World Importers		3/1/2024	Released	39,210.00	39,210.00
106013	50000	Nod Publishers		3/1/2024	Released	22,000.00	22,000.00
106014	50000	Nod Publishers		3/1/2024	Released	5,780.00	5,780.00
106015	10000	Fabrikam, Inc.		6/4/2025	Released	16,834.00	16,834.00
106017	64000	Hydropower Powerplant		6/4/2025	Open	332.20	332.20
106018	64000	Hydropower Powerplant		6/4/2025	Open	207.63	207.63
106019	64000	Hydropower Powerplant		6/4/2025	Open	41.53	41.53
106020	10000	Fabrikam, Inc.		6/4/2025	Open	65.00	65.00
106024	82000	Subcontractor		6/4/2025	Released	84.36	84.36
106025	30000	Graphic Design Institute		6/4/2025	Open	500.00	500.00

**Details** | Attachments (0)

**Vendor Details**

Vendor No. 10000  
 Name Fabrikam, Inc.  
 Phone No. 4255550101  
 Email [krystal.york@contoso.com](mailto:krystal.york@contoso.com)  
 Fax No.  
 Contact Krystal York

Purchase Order



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# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

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[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

Purchaser Code	<input type="text"/>	Address 2	<input type="text"/>	Vendor Order No.	<input type="text"/>
Order Date	6/4/2025	City	Miami	Vendor Shipment No.	<input type="text"/>
		State	FL	Alternate Vendor Address Code	<input type="text"/>
		ZIP Code	37125	Assigned User ID	<input type="text"/>
		Country/Region	US	Status	Open
		Contact No.	CT000008	Posting Date	<input type="text"/>
		Contact	Bryce Jasso	Vendor Invoice No.	<input type="text"/>
		Phone No.	<input type="text"/>	Invoice Received Date	<input type="text"/>
		Mobile Phone No.	<input type="text"/>	Quote No.	<input type="text"/>
		Email	bryce.jasso@contoso.com	No. of Archived Versions	0

Lines | [Manage](#) | Line | Functions | Order

[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	SHAFT-HT01		Heat Treat	600	101015			100	PCS	5.00	MIAMI, FL	500.00	100	-

Purchase Order



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Home Prepare Print/Send Request Approval Order More options

Post... Release... Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

Purchaser Code	<input type="text"/>	Address 2	<input type="text"/>	Vendor Order No.	<input type="text"/>
Order Date	6/4/2025	City	Miami	Vendor Shipment No.	<input type="text"/>
		State	FL	Alternate Vendor Address Code	<input type="text"/>
		ZIP Code	37125	Assigned User ID	<input type="text"/>
		Country/Region	US	Status	Open
		Contact No.	CT000008	Posting Date	<input type="text"/>
		Contact	Bryce Jasso	Vendor Invoice No.	<input type="text"/>
		Phone No.	<input type="text"/>	Invoice Received Date	<input type="text"/>
		Mobile Phone No.	<input type="text"/>	Quote No.	<input type="text"/>
		Email	bryce.jasso@contoso.com	No. of Archived Versions	0

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
Item	SHAFT-HT01		Heat Treat	600	101015			100	PCS	5.00	MIAMI, FL	500.00	100	-



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[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

Purchaser Code	<input type="text"/>	Address 2	<input type="text"/>	Vendor Order No.	<input type="text"/>
Order Date	6/4/2025	City	Miami	Vendor Shipment No.	<input type="text"/>
		State	FL	Alternate Vendor Address Code	<input type="text"/>
		ZIP Code	37125	Assigned User ID	<input type="text"/>
		Country/Region	US	Status	Open
		Contact No.	CT000008	Posting Date	<input type="text"/>
		Contact	Bryce Jasso	Vendor Invoice No.	<input type="text"/>
		Phone No.	<input type="text"/>	Invoice Received Date	<input type="text"/>
		Mobile Phone No.	<input type="text"/>	Quote No.	<input type="text"/>
		Email	bryce.jasso@contoso.com	No. of Archived Versions	0

Lines | [Manage](#) | Line | Functions | Order

[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	SHAFT-HT01		Heat Treat	600	101015			100	PCS	5.00	MIAMI, FL	500.00	100	-

Purchase Order



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# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

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[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

Purchaser Code	<input type="text"/>	Address 2	<input type="text"/>	Vendor Order No.	<input type="text"/>
Order Date	6/4/2025	City	Miami	Vendor Shipment No.	<input type="text"/>
		State	FL	Alternate Vendor Address Code	<input type="text"/>
		ZIP Code	37125	Assigned User ID	<input type="text"/>
		Country/Region	US	Status	Open
		Contact No.	CT000008	Posting Date	<input type="text"/>
		Contact	Bryce Jasso	Vendor Invoice No.	<input type="text"/>
		Phone No.	<input type="text"/>	Invoice Received Date	<input type="text"/>
		Mobile Phone No.	<input type="text"/>	Quote No.	<input type="text"/>
		Email	bryce.jasso@contoso.com	No. of Archived Versions	0

Lines | [Manage](#) | Line | Functions | Order

[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	SHAFT-HT01		Heat Treat	600	101015			100	PCS	5.00	MIAMI, FL	500.00	100	-

# 106025 · Graphic Design Institute

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[Post...](#) [Release](#) [Create Whse. Receipt](#) [Create Inventory Put-away/Pick...](#) [Send Intercompany Purchase Order](#) [Archive Document](#)

Purchaser Code	<input type="text"/>	Address 2	<input type="text"/>	Vendor Order No.	<input type="text"/>
Order Date	6/4/2025	City	Miami	Vendor Shipment No.	<input type="text"/>
		State	FL	Alternate Vendor Address Code	<input type="text"/>
		ZIP Code	37125	Assigned User ID	<input type="text"/>
		Country/Region	US	Status	Open
		Contact No.	CT000008	Posting Date	<input type="text"/>
		Contact	Bryce Jasso	Vendor Invoice No.	<input type="text"/>
		Phone No.	<input type="text"/>	Invoice Received Date	<input type="text"/>
		Mobile Phone No.	<input type="text"/>	Quote No.	<input type="text"/>
		Email	bryce.jasso@contoso.com	No. of Archived Versions	0

Lines [Manage](#) Line Functions Order

[New Line](#) [Delete Line](#) [Select items...](#)

101015  
Heat Treated Steel Shaft  
Released

SHAFT-HT01  
11/15/2025

[Open full list](#)

Type	No.	Item Reference No.	Description	Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	SHAFT-HT01		Heat Treat		100	PCS	5.00	MIAMI, FL	500.00	100	-

# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

Purchaser Code	<input type="text"/>	Address 2	<input type="text"/>	Vendor Order No.	<input type="text"/>
Order Date	6/4/2025	City	Miami	Vendor Shipment No.	<input type="text"/>
		State	FL	Alternate Vendor Address Code	<input type="text"/>
		ZIP Code	37125	Assigned User ID	<input type="text"/>
		Country/Region	US	Status	Open
		Contact No.	CT000008	Posting Date	<input type="text"/>
		Contact	Bryce Jasso	Vendor Invoice No.	<input type="text"/>
		Phone No.	<input type="text"/>	Invoice Received Date	<input type="text"/>
		Mobile Phone No.	<input type="text"/>	Quote No.	<input type="text"/>
		Email	bryce.jasso@contoso.com	No. of Archived Versions	0

Lines | [Manage](#) | Line | Functions | Order

[New Line](#) | [Delete Line](#) | [Select items...](#)

101015  
 Heat Treated Steel Shaft  
 Released

SHAFT-HT01  
 11/15/2025

Open full list

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received		
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	100	PCS	5.00	MIAMI, FL	500.00	100	-

No. ↑	Description	Source No.	Routing No.	Quantity	Starting Date-Time	Ending Date-Time	Due Date	Assigned User ID	Status ↑ ▾	Search Description
101002	Airpot	SP-SCM1009	SP-SCM1009...	10	6/2/2025 1:52 PM	6/3/2025 4:00 PM	6/4/2025		Released	AIRPOT
101004	Airpot	SP-SCM1009	SP-SCM1009...	1	6/3/2025 2:00 PM	6/3/2025 4:00 PM	6/4/2025		Released	AIRPOT
101006	Airpot	SP-SCM1009	SP-SCM1009...	3	6/25/2025 3:19 PM	6/26/2025 10:31 ...	6/27/2025		Released	AIRPOT
101007	AutoDrip	SP-SCM1004	SP-SCM1004	2	6/2/2025 1:48 PM	6/2/2025 4:00 PM	6/4/2025		Released	AUTODRIP
101014	Reservoir Assembly	SP-BOM2000	SP-BOM2000	1	6/3/2025 7:00 AM	6/3/2025 3:00 AM	6/4/2025		Released	RESERVOIR...
101015	Heat Treated Steel Shaft	SHAFT:HT01	SHAFT:HT01	100	11/11/2025 8:50 ...	11/14/2025 3:00 ...	11/15/2025		Released	HEAT TREA...

Home | Print | Order | Actions | **Related** | Reports | Automate | Fewer options

Change Status... Refresh Product **Order** > **Entries** > Item Ledger Entries | Item Unit Cost... Replan...

**General**

No. 101015  
 Description Heat Treated Steel Shaft  
 Description 2  
 Source Type Item

IT01  
 HEAT TREATED STEEL SHAFT  
 100  
 11/15/2025

Assigned User ID  
 Blocked  
 Last Date Modified 10/19/2025  
 Reopened  
 Manual Scheduling

Lines | Manage | Functions | Line

New Line Delete Line

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.	Unit Cost	Cost Amount
→ SHAFT-HT01	11/15/2025	Heat Treated Steel Shaft	11/11/2025 8:50 PM	11/14/2025 3:00 AM	100	PCS	0	100	SHAFT-HT01	SHAFT-HT01	0.00	0.00

Schedule > 11/11/2025 8:50 PM 11/14/2025 3:00 AM

Capacity Ledger Entries | Find entries... Entry | More options

Posting Date	Order Type	Order No.	Type	No.	Operation No.	Item No.	Description	Quantity	Output Quantity	Scrap Quantity	Direct Cost	Overhead Cost	Department Code	Customergroup Code	Entry No.
6/4/2025	Production	101015	Work Center	400	010	SHAFT-HT01	Machining	129	100	0	322.50	0.00			29

Purchase Order



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# 106025 · Graphic Design Institute

Notifications: 2 *G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.*

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[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

## General

Show more

Vendor Name	<input type="text" value="Graphic Design Institute"/>	Document Date	<input type="text" value="6/4/2025"/>	Status	<b>Open</b>
Buy-from		Posting Date	<input type="text" value="11/14/2025"/>	Vendor Invoice No.	<input type="text" value="*"/>
Contact	<input type="text" value="Bryce Jasso"/>	Vendor Shipment No.	<input type="text" value="PK*1212"/>		

Lines | [Manage](#) | Line | Functions | Order

[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00	100	-

Subtotal Excl. Tax (USD)	<input type="text" value="500.00"/>	Invoice Discount %	<input type="text" value="0"/>	Total Tax (USD)	<input type="text" value="0.00"/>
Inv. Discount Amount (USD)	<input type="text" value="0.00"/>	Total Excl. Tax (USD)	<input type="text" value="500.00"/>	Total Incl. Tax (USD)	<input type="text" value="500.00"/>

Notifications: 2 G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.

- Home Prepare Print/Send Request Approval Order More options
- Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

General Show more

Vendor Name: Graphic Design Institute Document Date: 6/4/2025 Status: Open

Buy-from: Posting Date: 11/14/2025 Vendor Invoice No. \*

Contact: Bryce Jasso Vendor Shipment No.: PK\*1212

Lines Manage Line Functions Order

- New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00	100	-

Subtotal Excl. Tax (USD)	500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	500.00	Total Incl. Tax (USD)	500.00

# 106025 · Graphic Design Institute

Notifications: 2 *G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.*

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

## General Show more

Vendor Name	<input type="text" value="Graphic Design Institute"/>	Document Date	<input type="text" value="6/4/2025"/>	Status	<b>Open</b>
Buy-from		Posting Date	<input type="text" value="11/14/2025"/>	Vendor Invoice No.	<input type="text" value="*"/>
Contact	<input type="text" value="Bryce Jasso"/>	Vendor Shipment No.	<input type="text" value="PK*1212"/>		

## Lines Manage

[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00	100	-

Subtotal Excl. Tax (USD)	<input type="text" value="500.00"/>	Invoice Discount %	<input type="text" value="0"/>	Total Tax (USD)	<input type="text" value="0.00"/>
Inv. Discount Amount (USD)	<input type="text" value="0.00"/>	Total Excl. Tax (USD)	<input type="text" value="500.00"/>	Total Incl. Tax (USD)	<input type="text" value="500.00"/>

Purchase Order



✓ Saved

# 106025 · Graphic Design Institute

Notifications: 2 *G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.*

Home Prepare Print/Send Request Approval Order More options

- Post...**
- Release
- Create Whse. Receipt
- Create Inventory Put-away/Pick...
- Send Intercompany Purchase Order
- Archive Document

## General

Show more

Vendor Name	Graphic Design Institute	Document Date	6/4/2025	Status	Open
Buy-from		Posting Date	11/14/2025	Vendor Invoice No.	*
Contact	Bryce Jasso	Vendor Shipment No.	PK*1212		

Lines **Manage** Line Functions Order

- New Line
- Delete Line
- Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00	100	

Subtotal Excl. Tax (USD)	500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	500.00	Total Incl. Tax (USD)	500.00

Purchase Order



✓ Saved

# 106025 · Graphic Design Institute

Notifications: 2 *G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.*

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

## General Show more

Vendor Name: Graphic Design Institute

Document Date: 6/4/2025

Status: **Open**

Buy-from: Bryce Jasso

Posting: **Receive**

Vendor Invoice No. \*

**i**  Receive

Invoice

Receive and Invoice

**OK** Cancel

## Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00	100	-

Subtotal Excl. Tax (USD)	500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	500.00	Total Incl. Tax (USD)	500.00

Purchase Order



✓ Saved

# 106025 · Graphic Design Institute

Notifications: 2 *G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. | Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox.*

Home Prepare Print/Send Request Approval Order More options

Post... Reopen Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

## General

Show more

Vendor Name	Graphic Design Institute	Document Date	6/4/2025	Status	Released
Buy-from		Posting Date	11/14/2025	Vendor Invoice No.	*
Contact	Bryce Jasso	Vendor Shipment No.	PK*1212		

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	.101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00		100

Subtotal Excl. Tax (USD)	500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	500.00	Total Incl. Tax (USD)	500.00

Released Production Order 101015 Heat Treated Steel Shaft

Capacity Ledger Entries | Find entries... Entry | More options

Posting Date	Order Type	Order No.	Type	No.	Operation No.	Item No.	Description	Quantity	Output Quantity	Scrap Quantity	Direct Cost	Overhead Cost	Department Code	Customergroup Code	Entry No.
11/14/2025	Production	101015	Work Center	600	020	SHAFT-HT01	Heat Treat	100	100	0	0.00	0.00			30
6/4/2025	Production	101015	Work Center	400	010	SHAFT-HT01	Machining	129	100	0	322.50	0.00			29

General

	Standard Cost	Expected Cost	Actual Cost	Dev. %	Variance
Material Cost	0.00	0.00	0.00	0	0.00
Non-Inventory Material Cost	0.00	0.00	0.00	0	0.00
Capacity Cost	0.00	325.00	322.50	0	322.50
Subcontracted Cost	0.00	500.00	0.00	0	0.00
Capacity Overhead	0.00	0.00	0.00	0	0.00
Manufacturing Overhead	0.00	0.00	0.00	0	0.00
Total Cost	0.00	825.00	322.50	0	322.50
Capacity Need	HOURS	2.16667	2.15	-1	

Components

Reserved from stock ..... None

# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

## General Show more

Vendor Name <input type="text" value="Graphic Design Institute"/>	Document Date <input type="text" value="6/4/2025"/>	Vendor Shipment No. <input type="text" value="PK*1212"/>
Buy-from	Posting Date <input type="text" value="11/14/2025"/>	Status <span style="background-color: #e0e0e0; padding: 2px;">Open</span>
Contact <input type="text" value="Bryce Jasso"/>		Vendor Invoice No. <input type="text" value="*"/>

## Lines Manage

[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	.101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00		100

Subtotal Excl. Tax (USD) <input type="text" value="500.00"/>	Invoice Discount % <input type="text" value="0"/>	Total Tax (USD) <input type="text" value="0.00"/>
Inv. Discount Amount (USD) <input type="text" value="0.00"/>	Total Excl. Tax (USD) <input type="text" value="500.00"/>	Total Incl. Tax (USD) <input type="text" value="500.00"/>

Purchase Order



✓ Saved

# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

Home Prepare Print/Send Request Approval Order More options

Post... Release... Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

## General

Show more

Vendor Name	Graphic Design Institute	Document Date	6/4/2025	Vendor Shipment No.	PK*1212
Buy-from		Posting Date	11/14/2025	Status	Open
Contact	Bryce Jasso	Vendor Invoice No.			

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
Item	SHAFT-HT01		Heat Treat	600	.101015	MAIN		100	PCS	5.00	MIAMI, FL	500.00		100

Subtotal Excl. Tax (USD)	500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	500.00	Total Incl. Tax (USD)	500.00

# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

[Post...](#) | [Release](#) | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

## General Show more

Vendor Name <input type="text" value="Graphic Design Institute"/>	Document Date <input type="text" value="6/4/2025"/>	Vendor Shipment No. <input type="text" value="PK*1212"/>
Buy-from	Posting Date <input type="text" value="11/14/2025"/>	Status <span style="background-color: #d3d3d3; padding: 2px;">Open</span>
Contact <input type="text" value="Bryce Jasso"/>		Vendor Invoice No. <input type="text" value="*"/>

## Lines Manage

[New Line](#) | [Delete Line](#) | [Select items...](#)

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.05	MIAMI, FL	505.00		100

Subtotal Excl. Tax (USD) <input type="text" value="505.00"/>	Invoice Discount % <input type="text" value="0"/>	Total Tax (USD) <input type="text" value="0.00"/>
Inv. Discount Amount (USD) <input type="text" value="0.00"/>	Total Excl. Tax (USD) <input type="text" value="505.00"/>	Total Incl. Tax (USD) <input type="text" value="505.00"/>

Purchase Order



✓ Saved

# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

Home Prepare Print/Send Request Approval Order More options

- Post... (highlighted)
- Release
- Create Whse. Receipt
- Create Inventory Put-away/Pick...
- Send Intercompany Purchase Order
- Archive Document

## General Show more

Vendor Name	Graphic Design Institute	Document Date	6/4/2025	Vendor Shipment No.	PK*1212
Buy-from		Posting Date	11/14/2025	Status	Open
Contact	Bryce Jasso			Vendor Invoice No.	*

## Lines Manage Line Functions Order

- New Line
- Delete Line
- Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.05	MIAMI, FL	505.00		100

Subtotal Excl. Tax (USD)	505.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	505.00	Total Incl. Tax (USD)	505.00

# 106025 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

## General Show more

Vendor Name:  Document Date:  Vendor Shipment No.:

Buy-from:  Posting:  Status: Open Vendor Invoice No.:

i  Receive

Invoice

Receive and Invoice

[OK](#) [Cancel](#)

## Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
→ Item	:	SHAFT-HT01	Heat Treat	600	101015	MAIN		100	PCS	5.05	MIAMI, FL	505.00		100

Subtotal Excl. Tax (USD)	505.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	505.00	Total Incl. Tax (USD)	505.00

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

General Show more

Vendor Name: Graphic Design Institute  
Buy-from: Bryce Jasso  
Document Date: 6/4/2025  
Posting:  Receive  Invoice  Receive and Invoice  
Vendor Shipment No.: PK\*1212  
Status: Open  
Vendor Invoice No.: 445233

Modal dialog with options: Receive, Invoice (selected), Receive and Invoice. Buttons: OK, Cancel.

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received
Item	SHAFT-HT01		Heat Treat	600	101015	MAIN		100	PCS	5.05	MIAMI, FL	505.00		100

Subtotal Excl. Tax (USD)	505.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	505.00	Total Incl. Tax (USD)	505.00

# 101015 · Heat Treated Steel Shaft

Home Print Order | Actions ▾ Related ▾ Reports ▾ Automate ▾ Fewer options

Dimensions **Statistics** Comments Attachments

## General Show less

No. ....	<input type="text" value="101015"/>	Source No. ....	<input type="text" value="SHAFT-HT01"/>	Assigned User ID .....	<input type="text"/>
Description .....	<input type="text" value="Heat Treated Steel Shaft"/>	Search Description .....	<input type="text" value="HEAT TREATED STEEL SHAFT"/>	Blocked .....	<input checked="" type="checkbox"/>
Description 2 .....	<input type="text"/>	Quantity .....	<input type="text" value="100"/>	Last Date Modified .....	<input type="text" value="10/20/2025"/>
Source Type .....	<input type="text" value="Item"/>	Due Date .....	<input type="text" value="11/15/2025"/>	Reopened .....	<input type="checkbox"/>
				Manual Scheduling .....	<input type="checkbox"/>

## Lines Manage Functions Line

[New Line](#) [Delete Line](#)

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Location Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.	Unit Cost	Cost Amount
→ SHAFT-HT01	11/15/2025	Heat Treated Steel Shaft	11/11/2025 8:50 PM	11/14/2025 3:00 AM	100	PCS	MAIN	100	0	SHAFT-HT01	SHAFT-HT01	0.00	0.00

**Schedule** > 11/11/2025 8:50 PM 11/14/2025 3:00 AM

Released Production Order 101015 Heat Treated Steel Shaft

Capacity Ledger Entries | Find entries... Entry | More options

Posting Date	Order Type	Order No.	Type	No.	Operation No.	Item No.	Description	Quantity	Output Quantity	Scrap Quantity	Direct Cost	Overhead Cost	Department Code	Customergroup Code	Entry No. ↓
11/14/2025	Production	101015	Work Center	600	020	SHAFT-HT01	Heat Treat	100	100	0	505.00	0.00			30
6/4/2025	Production	101015	Work Center	400	010	SHAFT-HT01	Machining	129	100	0	322.50	0.00			29

Production Order Statistics



✓ Saved

## 101015 · Heat Treated Steel Shaft

### General

	Standard Cost	Expected Cost	Actual Cost	Dev. %	Variance
Material Cost	0.00	0.00	0.00	0	0.00
Non-Inventory Material Cost	0.00	0.00	0.00	0	0.00
Capacity Cost	0.00	325.00	322.50	0	322.50
Subcontracted Cost	0.00	500.00	505.00	0	505.00
Capacity Overhead	0.00	0.00	0.00	0	0.00
Manufacturing Overhead	0.00	0.00	0.00	0	0.00
Total Cost	0.00	825.00	827.50	0	827.50
Capacity Need	HOURS	2.16667	2.15	-1	

### Components

Reserved from stock ..... None

# USER STORY 2 – BLANKET SUBCONTRACTING



**As a Production Planner,**



**I want to be able to send out multiple parts for subcontracting which all have the same unit cost but not linked to the production order and work centre**



**so that I don't have to manage multiple purchase lines for the same item, with the same cost to the same vendors because I sent out items in batches**



**Lil tweak to the Work Centre...**

Work Center Card



✓ Saved

# 600 · Heat Treat

Home | Work Center | Related | Reports | Automate | Fewer options

Load | Calendar | Absence

## General

No. ....	<input type="text" value="600"/>	Work Center Group Code .....	<input type="text" value="5"/>
Name .....	<input type="text" value="Heat Treat"/>	Search Name .....	<input type="text" value="HEAT TREAT"/>

## Posting

Direct Unit Cost .....	<input type="text" value="0.00"/>	Unit Cost .....	<input type="text" value="0.00"/>	Subcontractor No. ....	<input type="text"/>
Indirect Cost % .....	<input type="text" value="0"/>	Unit Cost Calculation .....	<input type="text" value="Units"/>	Flushing Method .....	<input type="text" value="Backward"/>
Overhead Rate .....	<input type="text" value="0.00"/>	Specific Unit Cost .....	<input checked="" type="checkbox"/>	Gen. Prod. Posting Group .....	<input type="text" value="MANUFACT"/>

## Scheduling

Unit of Measure Code .....	<input type="text" value="DAYS"/>	Efficiency .....	<input type="text" value="100"/>	Queue Time .....	<input type="text" value="0"/>
Capacity .....	<input type="text" value="1"/>	Consolidated Calendar .....	<input type="checkbox"/>	Queue Time Unit of Meas. Code .....	<input type="text"/>
		Shop Calendar Code .....	<input type="text" value="30000"/>		

## Warehouse

Location Code .....	<input type="text"/>	To-Production Bin Code .....	<input type="text"/>
Open Shop Floor Bin Code .....	<input type="text"/>	From-Production Bin Code .....	<input type="text"/>



**Multiple Production Orders for same process, all for the same cost**



# 101016 · Heat Treated Steel Shaft



# 101017 · Heat Treated Steel Shaft

Change Status... Refresh Production Order... Create Inventory P...ay/Pick/Movement... Create Warehouse Pick Update Unit Cost... Replan...

## General



Description

# 101018 · Heat Treated Steel Shaft

Description

Change Status... Refresh Production Order... Create Inventory P...ay/Pick/Movement... Create Warehouse Pick Update Unit Cost... Replan...

## General

No. ....	<input type="text" value="101018"/>	Source No. ....	<input type="text" value="SHAFT-HT01"/>	Assigned User ID .....	<input type="text"/>
Description .....	<input type="text" value="Heat Treated Steel Shaft"/>	Search Description .....	<input type="text" value="HEAT TREATED STEEL SHAFT"/>	Blocked .....	<input checked="" type="checkbox"/>
Description 2 .....	<input type="text"/>	Quantity .....	<input type="text" value="19"/>	Last Date Modified .....	<input type="text" value="10/20/2025"/>
Source Type .....	<input type="text" value="Item"/>	Due Date .....	<input type="text" value="11/22/2025"/>	Reopened .....	<input type="checkbox"/>
				Manual Scheduling .....	<input type="checkbox"/>

New Line Delete Line

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Location Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.
SHAFT-HT01	11/22/2025	Heat Treated Steel Shaft	11/18/2025 10:11 ...	11/21/2025 3:00 AM	19	PCS		0	19	SHAFT-HT01	SHAFT-HT01
→					0			0	0		



# BLANKET PROCESS

# 1002 · Graphic Design Institute

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

[Make Order](#) | [Release](#) | [Archive Document](#)

## General

Vendor Name	Graphic Design Institute	Due Date	11/30/2025	Vendor Order No.	
Contact	Bryce Jasso	Order Date	11/14/2025	Purchaser Code	
No. of Archived Versions	0	Vendor Shipment No.		Assigned User ID	
Document Date	11/14/2025	Order Address Code		Status	Open

## Lines

[New Line](#) | [Delete Line](#)

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Discount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Quantity Invoiced
→ G/L Account	50400		Subcontracted work - Heat Treating		1,000		4.50		4,500.00	1,000		

Subtotal Excl. Tax (USD)	4,500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	4,500.00	Total Incl. Tax (USD)	4,500.00

# 1002 · Graphic Design Institute

[Home](#) [Prepare](#) [Print/Send](#) [Request Approval](#) [Order](#) | [More options](#)

[Make Order](#) [Release](#) | [Archive Document](#)

## General Show more

Vendor Name	Graphic Design Institute	Due Date	11/30/2025	Vendor Order No.	
Contact	Bryce Jasso	Order Date	11/9/2025	Purchaser Code	
No. of Archived Versions	0	Vendor Shipment No.		Assigned User ID	
Document Date	11/14/2025	Order Address Code		Status	Open

## Lines Manage Functions Line

[New Line](#) [Delete Line](#)

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Discount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Quantity Invoiced
→ G/L Account	50400		Subcontracted work - Heat Treating		1,000		4.50		4,500.00	19		

Subtotal Excl. Tax (USD)	4,500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	4,500.00	Total Incl. Tax (USD)	4,500.00

# 1002 · Graphic Design Institute

[Home](#) [Prepare](#) [Print/Send](#) [Request Approval](#) [Order](#) | [More options](#)

[Make Order](#) [Release](#) | [Archive Document](#)

## General

Vendor Name	Graphic Design Institute	Due Date	11/30/2025	Vendor Order No.	
Contact	Bryce Jasso	<b>Order Date</b>	<b>11/9/2025</b>	Purchaser Code	
No. of Archived Versions	0	Vendor Shipment No.		Assigned User ID	
Document Date	11/14/2025	Order Address Code		Status	Open

## Lines

[New Line](#) [Delete Line](#)

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Discount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Quantity Invoiced
→ G/L Account	50400		Subcontracted work - Heat Treating		1,000		4.50		4,500.00	19		

Subtotal Excl. Tax (USD)	4,500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	4,500.00	Total Incl. Tax (USD)	4,500.00

# 1002 · Graphic Design Institute

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

[Make Order](#) | [Release](#) | [Archive Document](#)

## General Show more

Vendor Name	Graphic Design Institute	Due Date	11/30/2025	Vendor Order No.	
Contact	Bryce Jasso	<b>Order Date</b>	<b>11/9/2025</b>	Purchaser Code	
No. of Archived Versions	0	Vendor Shipment No.		Assigned User ID	
Document Date	11/14/2025	Order Address Code		Status	Open

## Lines Manage Functions Line

[New Line](#) | [Delete Line](#)

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Discount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Quantity Invoiced
→ G/L Account	50400		Subcontracted work - Heat Treating		1,000		4.50		4,500.00	19		

Subtotal Excl. Tax (USD)	4,500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	4,500.00	Total Incl. Tax (USD)	4,500.00

G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. [Open the General Posting Setup page.](#)

Home Prepare Print/Send Request Approval Order More options

Make Order Release Archive Document

General Show more

Vendor Name	Graphic Design Institute	Due Date	11/30/2025	Vendor Order No.	
Contact	Bryce Jasso	Order D		Purchaser Code	
No. of Archived Versions	0	Vendor		Assigned User ID	
Document Date	11/14/2025	Order A		Status	Open

Do you want to create an order from the blanket order?

Yes No

Lines Manage Functions Line

Explode BOM Insert Ext. Text

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Discount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Quantity Invoiced
→ G/L Account	50400		Subcontracted work - Heat Treating		1,000		4.50		4,500.00	19		

Subtotal Excl. Tax (USD)	4,500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	4,500.00	Total Incl. Tax (USD)	4,500.00

# 1002 · Graphic Design Institute

G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. [Open the General Posting Setup page.](#)

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [More options](#)

[Make Order](#) | [Release](#) | [Archive Document](#)

## General Show more

Vendor Name	Graphic Design Institute	Due Date	11/30/2025	Vendor Order No.	
Contact	Bryce Jasso	Order D		Purchaser Code	
No. of Archived Versions	0	Vendor		Assigned User ID	
Document Date	11/14/2025	Order A		Status	Open

**i** Order 106026 has been created from blanket order 1002.

[OK](#)

## Lines Manage | [Functions](#) | [Line](#)

[Explode BOM](#) | [Insert Ext. Text](#)

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Discount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Quantity Invoiced
→ G/L Account	50400		Subcontracted work - Heat Treating		1,000		4.50		4,500.00			

Subtotal Excl. Tax (USD)	4,500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	4,500.00	Total Incl. Tax (USD)	4,500.00

G/L accounts for discounts are missing on one or more lines on the General Posting Setup page. Open the General Posting Setup page.

Home Prepare Print/Send Request Approval Order More options

Make Order Release Archive Document

General Show more

Vendor Name: Graphic Design Institute  
Contact: Bryce Jasso  
No. of Archived Versions: 0  
Document Date: 11/14/2025

Vendor Order No.  
Purchaser Code  
Assigned User ID  
Status: Open

**!** Qty. to Receive (Base) of G/L Account 50400 in Line No. 10000 cannot be more than 981.  
Outstanding Qty. (Base) - Unposted Outstanding Qty. (Base) = Possible Qty. to Receive (Base)  
1,000 - 19 = 981.

Share details

Was this information helpful? Yes No OK

Lines Manage Functions Line

Explode BOM Insert Ext. Text

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Discount %	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Quantity Invoiced
G/L Account	50400		Subcontracted work - Heat Treating		1,000		4.50		4,500.00	1,000		
→ G/L Account												

Subtotal Excl. Tax (USD)	4,500.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	4,500.00	Total Incl. Tax (USD)	4,500.00

# PRODUCTION



# 101016 · Heat Treated Steel Shaft

Home | Print | Order | Actions ▾ | Related ▾ | Reports ▾ | Automate ▾ | Fewer options

- Change Status...
- Refresh Production Order...
- Create Inventory P...ay/Pick/Movement...
- Create Warehouse Pick
- Update Unit Cost...
- Replan...

Lines | Manage | Functions | Line

- Item Availability by ▾
- Reservation Entries
- Dimensions
- Routing
- Components
- Attachments
- Item Tracking Lines
- Production Journal

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Location Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.
→ SHAFT-HT01	11/14/2025	Heat Treated Steel Shaft	11/10/2025 10:1...	11/13/2025 3:00 ...	15	PCS	MAIN	0	15	SHAFT-HT01	SHAFT-HT01

## Schedule >

11/10/2025 10:15 PM | 11/13/2025 3:00 AM

## Posting

Inventory Posting Group .....  Customergroup Code .....

# 101016 · Heat Treated Steel Shaft

Home | Print | Order | Actions | **Related** | Reports | Automate | Fewer options

Change Status... Refresh Product **Order**

- Entries
- Planning
- Put-away/Pick Lines/Movement Lines
- Registered Pick Lines
- Registered Invt. Movement Lines
- Registered Put-away Lines
- Other

Warehouse Pick Update Unit Cost... Replan...

Lines | Manage | Functions | Line

Item Availability by Reservation Entries Dimensions

Attachments Item Tracking Lines Production Journal

Item No.	Due Date	Description	Quantity	Unit of Measure Code	Location Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.
→ SHAFT-HT01	11/14/2025	Heat Treated Steel Shaft	15	PCS	MAIN	0	15	SHAFT-HT01	SHAFT-HT01

## Schedule >

11/10/2025 10:15 PM | 11/13/2025 3:00 AM

## Posting

Inventory Posting Group: RESALE Customergroup Code: [ ]

General

	Standard Cost	Expected Cost	Actual Cost	Dev. %	Variance
Material Cost					
Non-Inventory Material Cost					
Capacity Cost					
Subcontracted Cost					
Capacity Overhead					
Manufacturing Overhead					
Total Cost					
Capacity Need		-	-		

Components

Reserved from stock					
---------------------	--	--	--	--	--



Change Status... Refresh Production Order... Create Inventory P...ay/Pick/Movement... Create Warehouse Pick Update Unit Cost... Replan...

Description 2  
Source Type: Item  
Source No.: SHAFT-HT01  
Search Description: HEAT TREATED STEEL SHAFT

Posting Date: 11/14/2025  
Update Unit Cost:   
Finish Order:

**Do you want to change the status of this production order?**

New Status:  Firm Planned  
 Released  
 Finished

Posting Date: 11/14/2025

Update Unit Cost:

Finish Order:

Yes No

Lines | Manage | Functions | Line

Item Availability by Reservation Entries Dimensions

Item No.	Due Date	Description	Starting	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.
→ SHAFT-HT01	11/14/2025	Heat Treated Steel Shaft	11/10/2025 10:1... 11/13/2025 3:00 ...	0	15	SHAFT-HT01	SHAFT-HT01

Tell me what you want to do

Don't know what to search for? Try [exploring pages](#) or [exploring reports](#)

No. ↑	Description	Source No.	Routing No.	Quantity	Starting Date-Time	Ending Date-Time	Due Date	Assign ID
101002	Airpot	SP-SCM1009	SP-SCM1009-SERIAL	10	6/2/2025 1:52 PM	6/3/2025 4:00 PM	6/4/2025	
101004	Airpot	SP-SCM1009	SP-SCM1009-SERIAL	1	6/3/2025 2:00 PM	6/3/2025 4:00 PM	6/4/2025	
101006	Airpot	SP-SCM1009	SP-SCM1009-SERIAL	3	6/25/2025 3:19 PM	6/26/2025 10:31 ...	6/27/2025	
101007	AutoDrip	SP-SCM1004	SP-SCM1004	2	6/2/2025 1:48 PM	6/2/2025 4:00 PM	6/4/2025	
101014	Reservoir Assembly	SP-BOM2000	SP-BOM2000	1	6/3/2025 7:00 AM	6/3/2025 3:00 AM	6/4/2025	
101018	Heat Treated Steel Shaft	SHAFT-HT01	SHAFT-HT01	19	11/18/2025 10:11...	11/21/2025 3:00 ...	11/22/2025	

Documents ▾

Name	File Extension
(There is nothing to show in this view)	

Notes +

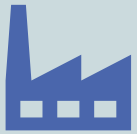
(There is nothing to show in this view)

Finished Production Order 101016 Heat Treated Steel Shaft

Capacity Ledger Entries | Find entries... Entry | More options

Posting Date	Order Type	Order No.	Type	No.	Operation No.	Item No.	Description	Quantity	Output Quantity	Scrap Quantity	Direct Cost	Overhead Cost	Dep. Cost
11/14/2025	Production	101016	Work Center	600	020	SHAFT-HT01	Heat Treat	15	15	0	75.00	0.00	
11/14/2025	Production	101016	Work Center	400	010	SHAFT-HT01	Machining	45	15	0	112.50	0.00	

# USER STORY 3 – DETAILED INVENTORY CONTROL



**As a Production Planner,**



**I want to be able to track or scrap inventory as part of my subcontracting process**



**so that I can clearly see what stage my production is in where the inventory is**



**HOW WOULD I DO  
IT?**

# Create parts where there could be a pause/break in production



Home | Work Center | Related | Reports | Automate | Fewer options

Load | Calendar | Absence

General

No. 600 Work Center Group Code 5  
Name Heat Treat Search Name HEAT TREAT

Posting

Direct Unit Cost 0.00 Unit Cost 0.00 Subcontractor No. 30000  
Indirect Cost % 0 Unit Cost Calculation Units Flushing Method Manual  
Overhead Rate 0.00 Specific Unit Cost [Toggle] Gen. Prod. Posting Group MANUFACT

Scheduling

Unit of Measure Code DAYS Efficiency 100 Queue Time 0  
Capacity 1 Consolidated Calendar [Toggle] Queue Time Unit of Meas. Code  
Shop Calendar Code 30000

Warehouse

Location Code To-Production Bin Code  
Open Shop Floor Bin Code From-Production Bin Code

You can get the sales forecast updated automatically every week. [Set Up Scheduled Forecasting](#) | Don't ask again

No. 1	Description	Type	Quantity on Hand	Substitutes Exist	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.	Inventory Posting Group	Gen. Prod. Posting Group	Item Category Code	Replenishment System
<a href="#">SHAFT-HT01</a>	Heat Treated Steel Shaft	Inventory	115	No	No	SHAFT-HT01-M	SHAFT-HT01	PCS	8.826	0.00		RESALE	RETAIL		Purchase
SHAFT-HT01-M	Machined Shaft	Inventory	0	No	No	SHAFT-HT01-M	SHAFT-HT01-M	PCS	2.50	0.00		RESALE	RETAIL		Prod. Order
SHAFT-RM	Raw Materials	Inventory	0	No	No			LBS	0.00	0.00	30000	RESALE	RETAIL		Purchase

You can get the sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

Views: All | Filter list by... | Filter totals by...

No. 1	Description	Type	Quantity on Hand	Substitutes Exist	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.	Inventory Posting Group	Gen. Prod. Posting Group	Item Category Code	Replenishment System
SHAFT-HT01	Heat Treated Steel Shaft	Inventory	115	No	No	SHAFT-HT01-M	SHAFT-HT01	PCS	8.826	0.00		RESALE	RETAIL		Purchase
SHAFT-HT01-M	Machined Shaft	Inventory	0	No	No	SHAFT-HT01-M	SHAFT-HT01-M	PCS	2.50	0.00		RESALE	RETAIL		Prod. Order
SHAFT-RM	Raw Materials	Inventory	0	No	No			LBS	0.00	0.00	30000	RESALE	RETAIL		Purchase

You can get the sales forecast updated automatically every week. [Set Up Scheduled Forecasting](#) | Don't ask again

No. 1	Description	Type	Quantity on Hand	Substitutes Exist	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.	Inventory Posting Group	Gen. Prod. Posting Group	Item Category Code	Replenishment System
<a href="#">SHAFT-HT01</a>	Heat Treated Steel Shaft	Inventory	115	No	No	SHAFT-HT01-M	SHAFT-HT01	PCS	8.826	0.00		RESALE	RETAIL		Purchase
SHAFT-HT01-M	Machined Shaft	Inventory	0	No	No	SHAFT-HT01-M	SHAFT-HT01-M	PCS	2.50	0.00		RESALE	RETAIL		Prod. Order
SHAFT-RM	Raw Materials	Inventory	0	No	No			LBS	0.00	0.00	30000	RESALE	RETAIL		Purchase

You can get the sales forecast updated automatically every week. [Set Up Scheduled Forecasting](#) | Don't ask again

No. 1	Description	Type	Quantity on Hand	Substitutes Exist	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.	Inventory Posting Group	Gen. Prod. Posting Group	Item Category Code	Replenishment System
SHAFT-HT01	Heat Treated Steel Shaft	Inventory	115	No	No	SHAFT-HT01-M	SHAFT-HT01	PCS	8.826	0.00		RESALE	RETAIL		Purchase
SHAFT-HT01-M	Machined Shaft	Inventory	0	No	No	SHAFT-HT01-M	SHAFT-HT01-M	PCS	2.50	0.00		RESALE	RETAIL		Prod. Order
SHAFT-RM	Raw Materials	Inventory	0	No	No			LBS	0.00	0.00	30000	RESALE	RETAIL		Purchase

Copy BOM... Production BOM Version Comparison Comments Versions Where-used Attachments More options

General Show more

No. SHAFT-HT01 Unit of Measure Code PCS Version Nos.

Description Production BOM - SHAFT-HT01

Copy BOM... Production BOM Version Comparison Comments Versions Where-used Attachments More options

General

No. SHAFT-HT01-M Unit of Measure Code PCS Version Nos.  
Description Heat Treated Steel Shaft Status Certified Active Version  
Last Date Modified 10/27/2025

Lines Manage Component

New Line Delete Line Select items...

Type	No.	Description	Quantity per	Unit of Measure Code	Scrap %	Routing Link Co
Item	SHAFT-RM	Raw Materials	12	LBS	0	

# This allows me to...



Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

- Home
  - Prepare
  - Print/Send
  - Request Approval
  - Order
  - Report
  - Actions
  - Related
  - Automate
  - Fewer options
- Post... Release... Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

**General** Show more

External Document No. ....	965326	Requested Delivery Date .....	11/15/2025	Work Description	
Document Date .....	10/19/2025	Sell-to		Posting Date .....	
Order Date .....	10/19/2025	Customer Name .....	Krowmat Inc	Status .....	Open
		Contact .....	Meagan Bond		

**Lines** Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Shipment Date	Department Code	Customergroup Code
→ Item	SHAFT-HT01	Heat Treated Steel Shaft	MAIN	100	PCS	10.00	1,000.00	100	-	100	-	11/15/2025	SALES	LARGE

Subtotal Excl. Tax (USD) .....	1,000.00	Invoice Discount % .....	0	Total Tax (USD) .....	0.00
Inv. Discount Amount Excl. Tax (USD) .....	0.00	Total Excl. Tax (USD) .....	1,000.00	Total Incl. Tax (USD) .....	1,000.00

**Invoice Details** Show less

Currency Code .....		Due Date .....	10/31/2025	Customergroup Code .....	LARGE
Gen. Bus. Posting Group .....	DOMESTIC	Tax Liable .....	<input checked="" type="checkbox"/>	Pmt. Discount Date .....	10/19/2025
Customer Posting Group .....	DOMESTIC	Tax Area Code .....	MIAMI, FL		
Payment Terms Code .....	CM	Department Code .....	SALES		

**Shipping and Billing** Show less

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

- Home
- Prepare
- Print/Send
- Request Approval
- Order
- Report
- Actions
- Related
- Automate
- Fewer options

General

External Document No. 965326  
 Document Date 10/19/2025  
 Order Date 10/19/2025  
 Requested Delivery Date 11/15/2025  
 Sell-to  
 Customer Name Krowmat Inc  
 Contact Meagan Bond  
 Work Description  
 Posting Date  
 Status Open

Lines

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Shipment Date	Department Code	Customergroup Code
Item	SHAFT-HT01	Heat Treated Steel Shaft	MAIN	100	PCS	10.00	1,000.00	100	-	100	-	11/15/2025	SALES	LARGE

Subtotal Excl. Tax (USD)	1,000.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Excl. Tax (USD)	1,000.00	Total Incl. Tax (USD)	1,000.00

Invoice Details

Currency Code  
 Gen. Bus. Posting Group DOMESTIC  
 Customer Posting Group DOMESTIC  
 Payment Terms Code CM  
 Due Date 10/31/2025  
 Tax Liabile  
 Tax Area Code MIAMI, FL  
 Department Code SALES  
 Customergroup Code LARGE  
 Pmt. Discount Date 10/19/2025

Shipping and Billing

Sales Order

Tell me what you want to do

Go to Pages and Tasks

- Planning Worksheets
- Tasks

Search for 'planning work'

- Search company data
- Search Help

Didn't find what you were looking for? Try exploring pages or exploring reports

S-ORD101016 · Krowmat Inc

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable th

Home Prepare Print/Send Request Approval Order Report Actions Related Automate Fewer op  
 Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

General

External Document No. 965326  
 Document Date 10/19/2025  
 Order Date 10/19/2025

Request...  
 Sell-to...  
 Customer Name Krowmat Inc  
 Contact Meagan Bond

Work Description  
 Posting Date  
 Status Open

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Shipment Date	Department Code	Customergroup Code
Item	SHAFT-HT01	Heat Treated Steel Shaft	MAIN	100	PCS	10.00	1,000.00	100		100		11/15/2025	SALES	LARGE

Subtotal Excl. Tax (USD) 1,000.00 Invoice Discount % 0 Total Tax (USD) 0.00  
 Inv. Discount Amount Excl. Tax (USD) 0.00 Total Excl. Tax (USD) 1,000.00 Total Incl. Tax (USD) 1,000.00

Invoice Details

Currency Code DOMESTIC Due Date 10/31/2025 Customergroup Code LARGE  
 Gen. Bus. Posting Group DOMESTIC Tax Liable Tax Area Code MIAMI, FL Pmt. Discount Date 10/19/2025  
 Customer Posting Group DOMESTIC Department Code SALES  
 Payment Terms Code CM

Shipping and Billing

Sales Order

Tell me what you want to do

Go to Pages and Tasks

- > Planning Worksheets
- Tasks

Search for 'planning work'

- Search company data
- Search Help

Didn't find what you were looking for? Try exploring pages or exploring reports

### S-ORD101016 · Krowmat Inc

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable th

Home Prepare Print/Send Request Approval Order Report Actions Related Automate Fewer op

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

#### General

External Document No. 965326  
Document Date 10/19/2025  
Order Date 10/19/2025

Request  
Sell-to  
Customer Name Krowmat Inc  
Contact Meagan Bond

Work Description  
Posting Date  
Status Open

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Shipment Date	Department Code	Customergroup Code
Item	SHAFT-HT01	Heat Treated Steel Shaft	MAIN	100	PCS	10.00	1,000.00	100		100		11/15/2025	SALES	LARGE

Subtotal Excl. Tax (USD)	1,000.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Excl. Tax (USD)	1,000.00	Total Incl. Tax (USD)	1,000.00

#### Invoice Details

Currency Code  
Gen. Bus. Posting Group DOMESTIC  
Customer Posting Group DOMESTIC  
Payment Terms Code CM  
Due Date 10/31/2025  
Tax Liable  
Tax Area Code MIAMI, FL  
Department Code SALES  
Customergroup Code LARGE  
Pmt. Discount Date 10/19/2025

#### Shipping and Billing





Planning Worksheets

Name: DEFAULT

Manage | Home | Prepare | Line | Item Availability by | More options

Calculate Regenerative Plan... | Get Action Messages...

Warning	No.	Action Message	Accept Action Messa...	Original Due Date	Due Date	Starting Date-Time	End
-			<input type="checkbox"/>				

Item Description | Routing Description

### Calculate Plan - Plan. Wksh.

**Options**

**Calculate**

MPS

MRP

Starting Date: 11/6/2025

Ending Date: 3/20/2026

Stop and Show First Error:

Use Forecast: [Dropdown]

Exclude Forecast Before: [Date Picker]

Respect Planning Parameters for ...:

**Filter: Item**

× No.: Shaft\*

× Description: [Text Box]

+ Filter...

Filter totals by:

× Location Filter: main

+ Filter...

OK | Cancel

### Item Details - Planning

- Item No.
- Reordering Policy
- Reorder Point
- Reorder Quantity
- Maximum Inventory
- Overflow Level
- Time Bucket
- Lot Accumulation Period
- Rescheduling Period
- Safety Lead Time
- Safety Stock Quantity
- Minimum Order Quantity
- Maximum Order Quantity
- Order Multiple
- Dampener Period
- Dampener Quantity

### Untracked Planning Elements

Source	Parameter Value	Untr Qu
(There is nothing to show in this view)		

Name: ..... DEFAULT

[Manage](#) [Home](#) [Prepare](#) | [Line](#) | [Item Availability by](#) | [More options](#)

[Calculate Regenerative Plan...](#) [Get Action Messages...](#)

Warning	No.	Action Message	Accept Action Message	Original Due Date	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
Attention	SHAFT-HT01	New	<input type="checkbox"/>		11/15/2025	11/12/2025 7:00 AM	11/14/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	100	Prod. Order	101008	Planned
Attention	SHAFT-HT01-M	New	<input type="checkbox"/>		11/12/2025	11/10/2025 8:50 PM	11/10/2025 11:00 PM	Machined Shaft		<input type="checkbox"/>	100	Prod. Order	101009	Planned
Attention	SHAFT-RM	New	<input type="checkbox"/>		11/10/2025	11/7/2025 7:00 AM	11/9/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	1,200	Purchase		

Name: ..... DEFAULT

Manage Home Prepare Line Item Availability by More options

Calculate Regenerative Plan... Get Action Messages...

Warning	No.	Action Message	Accept Action Message	Original Due Date	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
Attention	SHAFT-HT01	New	<input checked="" type="checkbox"/>		11/15/2025	11/12/2025 7:00 AM	11/14/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	100	Prod. Order	101008	Planned
Attention	SHAFT-HT01-M	New	<input checked="" type="checkbox"/>		11/12/2025	11/10/2025 8:50 PM	11/10/2025 11:00 PM	Machined Shaft		<input type="checkbox"/>	100	Prod. Order	101009	Planned
→ Attention	SHAFT-RM	New	<input checked="" type="checkbox"/>		11/10/2025	11/7/2025 7:00 AM	11/9/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	1,200	Purchase		

Item Description: Raw Materials

Routing Description:

Name: ..... DEFAULT

[Manage](#) | [Home](#) | [Prepare](#) | [Line](#) | [Item Availability by](#) | [More options](#)

[Carry Out Action Message...](#) | [Refresh Planning Line...](#) | [Reserve](#)

Warning	No.	Action Message	Accept Action Message	Original Due Date	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
Attention	SHAFT-HT01	New	<input checked="" type="checkbox"/>		11/15/2025	11/12/2025 7:00 AM	11/14/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	100	Prod. Order	101008	Planned
Attention	SHAFT-HT01-M	New	<input checked="" type="checkbox"/>		11/12/2025	11/10/2025 8:50 PM	11/10/2025 11:00 PM	Machined Shaft		<input type="checkbox"/>	100	Prod. Order	101009	Planned
→ Attention	SHAFT-RM	New	<input checked="" type="checkbox"/>		11/10/2025	11/7/2025 7:00 AM	11/9/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	1,200	Purchase		

Item Description | Routing Description

Raw Materials

Name: DEFAULT

Manage Home Prepare Line Item Availability by More options

Carry Out Action Message... Refresh Planning Line... Reserve

Warning	No.	Action Message	Accept Action Message	Original Due Date	Due Date	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
Attention	SHAFT-HT01	New	<input checked="" type="checkbox"/>		11/15/2025		<input checked="" type="checkbox"/>	100	Prod. Order	101008	Planned
Attention	SHAFT-HT01-M	New	<input checked="" type="checkbox"/>		11/12/2025		<input type="checkbox"/>	100	Prod. Order	101009	Planned
Attention	SHAFT-RM	New	<input checked="" type="checkbox"/>		11/10/2025		<input type="checkbox"/>	1,200	Purchase		

### Carry Out Action Msg. - Plan.

**Options**

**Production Order**

Production Order ..... Firm Planned

**Assembly Order**

Assembly Order .....

**Purchase Order**

Purchase Order ..... Make Purch. Orders

**Transfer Order**

Transfer Order .....

Combine Transfer Orders .....

Stop and Show First Error .....

**OK** **Cancel**

Name: DEFAULT

Manage Home Prepare Line Item Availability by More options  
Carry Out Action Message... Refresh Planning Line... Reserve

Warning	No.	Action Message	Accept Action Message	Original Due Date	Due Date
Attention	SHAFT-HT01	New	<input checked="" type="checkbox"/>		11/15/2025
Attention	SHAFT-HT01-M	New	<input checked="" type="checkbox"/>		11/12/2025
Attention	SHAFT-RM	New	<input checked="" type="checkbox"/>		11/10/2025

Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
	<input checked="" type="checkbox"/>	100	Prod. Order	101008	Planned
	<input type="checkbox"/>	100	Prod. Order	101009	Planned
	<input type="checkbox"/>	1,200	Purchase		

### Carry Out Action Msg. - Plan.

**Options**

Production Order  
Production Order: Firm Planned

Assembly  
Assembly: [Dropdown]

Purchase  
Purchase: [Dropdown]

Transfer  
Transfer Order: [Dropdown]

Combine Transfer Orders:

Stop and Show First Error:

OK Cancel

### Working on it..

Worksheet Name DEFAULT  
Checking worksheet lines  
Creating purchase orders  
Creating purchase lines  
Deleting worksheet lines





**The raw material**

You can get the sales forecast updated automatically every week. [Set Up Scheduled Forecasting](#) | Don't ask again

**Views**

All

Filter list by...

Filter totals by...

No. 1	Description	Type	Quantity on Hand	Substitutes Exist	Assembly BOM	Production BOM No.	Routing No.	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.	Inventory Posting Group	Gen. Prod. Posting Group	Item Category	Replenishment System
SHAFT-HT01	Heat Treated Steel Shaft	Inventory	0	No	No	SHAFT-HT01	SHAFT-HT01	PCS	8.826	0.00		RESALE	RETAIL		Prod. Order
SHAFT-HT01-M	Machined Shaft	Inventory	0	No	No	SHAFT-HT01-M	SHAFT-HT01-M	PCS	2.50	0.00		RESALE	RETAIL		Prod. Order
SHAFT-RM	Raw Materials	Inventory	1,200	No	No			LBS	0.50	0.00	30000	RESALE	RETAIL		Purchase

Firm Planned Prod. Orders

+ New Manage Reports Update Unit Cost... Change Status Statistics More options

No.	Description	Source No.	Routing No.	Quantity	Starting Date-Time	Ending Date-Time	Due Date	Assigned User ID	Status
101019	Heat Treated Steel Shaft	SHAFT-HT01	SHAFT-HT01	100	11/12/2025 7:00 ...	11/14/2025 7:00 ...	11/15/2025		Firm P
101020	Machined Shaft	SHAFT-HT01-...	SHAFT-HT01-...	100	11/10/2025 8:50 ...	11/10/2025 11:00...	11/12/2025		Firm P

Documents

Name File Exter

(There is nothing to show in this view)

Notes +

(There is nothing to show in this view)

You can get the sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

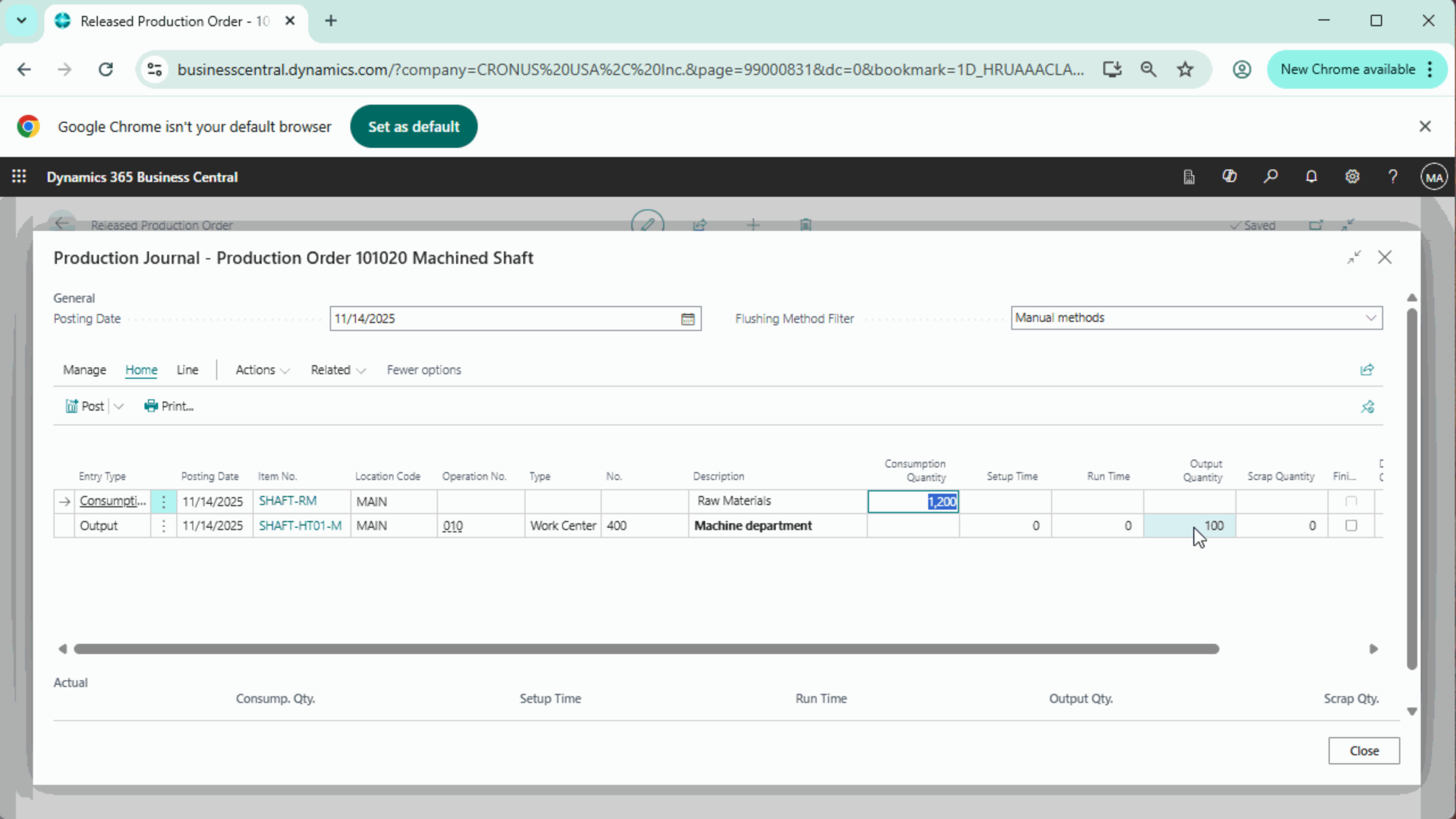
**Views** X

All

Filter list by...

Filter totals by...

No. 1	Description	Type	Quantity on Hand	Substi... Exist	Assem... BOM	Production BOM No.	Routing No.	Base Unit of Measure	Unit Cost	Unit Price	Vendor No.
SHAFT-HT01	Heat Treated Steel Shaft	Inventory	0	No	No	SHAFT-HT01	SHAFT-HT01	PCS	8.826	0.00	
SHAFT-HT0...	Machined Shaft	Inventory	0	No	No	SHAFT-HT01-...	SHAFT-HT01-...	PCS	2.50	0.00	
SHAFT-RM	Raw Materials	Inventory	1,200	No	No			LBS	0.50	0.00	30000



### Production Journal - Production Order 101020 Machined Shaft

General

Posting Date 11/14/2025

Flushing Method Filter Manual methods

Manage Home Line Actions Related Fewer options

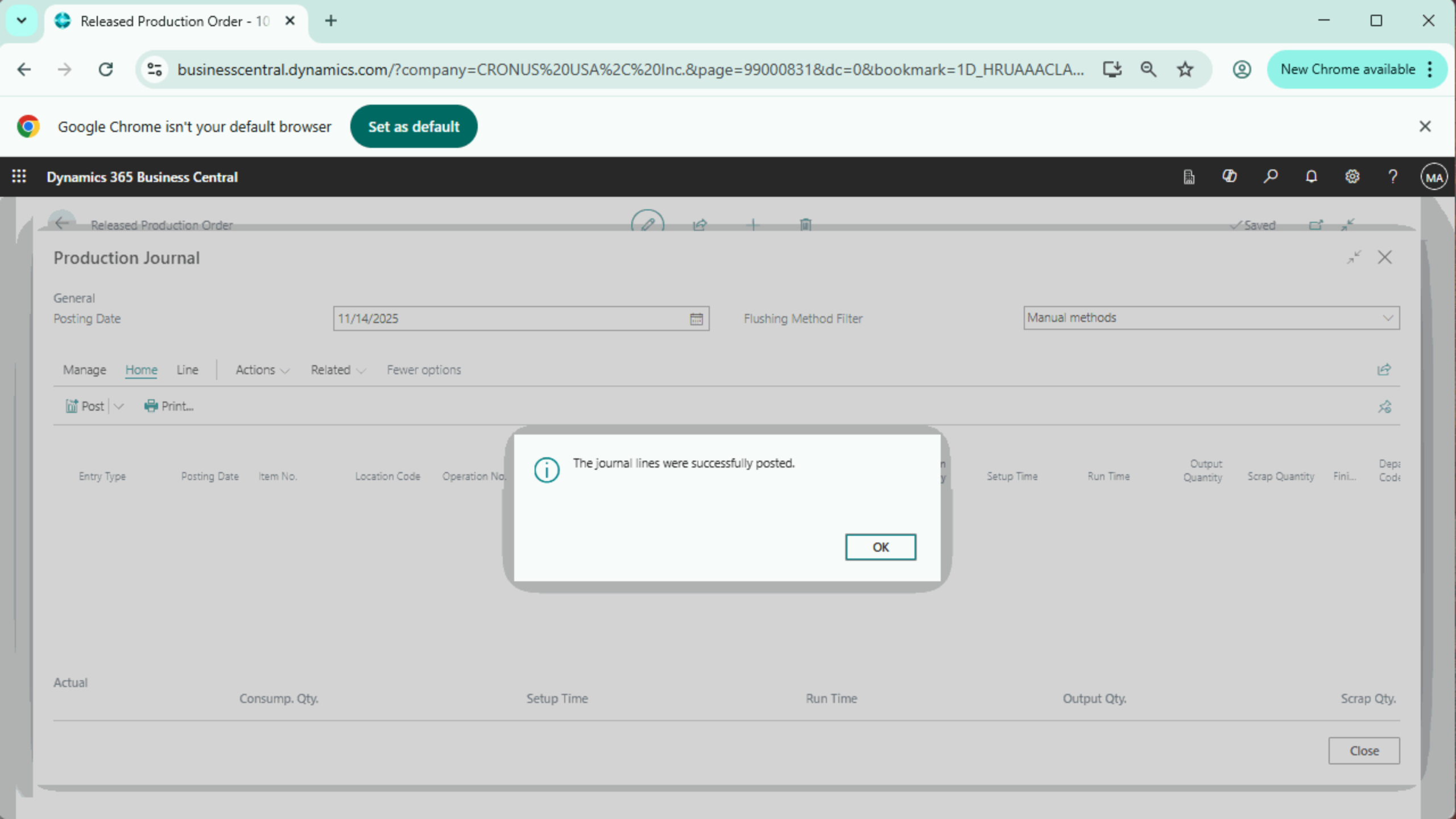
Post Print...

Entry Type	Posting Date	Item No.	Location Code	Operation No.	Type	No.	Description	Consumption Quantity	Setup Time	Run Time	Output Quantity	Scrap Quantity	Fin...
→ Consumpti...	11/14/2025	SHAFT-RM	MAIN				Raw Materials	1,200					<input type="checkbox"/>
Output	11/14/2025	SHAFT-HT01-M	MAIN	010	Work Center	400	Machine department		0	0	100	0	<input type="checkbox"/>

Actual

Consump. Qty.	Setup Time	Run Time	Output Qty.	Scrap Qty.
---------------	------------	----------	-------------	------------

Close



 The journal lines were successfully posted.





**I could scrap, I could move  
this around my warehouse...**

Firm Planned Prod. Orders

+ New Manage Reports Update Unit Cost... Change Status Statistics More options

No.	Description	Source No.	Routing No.	Quantity	Starting Date-Time	Ending Date-Time	Due Date	Assigned User ID	Status
101019	Heat Treated Steel Shaft	SHAFT-HT01	SHAFT-HT01	100	11/12/2025 7:00	11/14/2025 7:00	11/15/2025		Firm P

**Do you want to change the status of this production order?**

New Status  Firm Planned  Released  Finished

Posting Date

Update Unit Cost

Finish Order

Documents

(There is nothing to show in this view)

Notes +

(There is nothing to show in this view)

Tell me what you want to do

Don't know what to search for? Try [exploring pages](#) or [exploring reports](#)

# Want to learn more about Business Central?

- + Transfer Order
- + Purchase Order
- + Inventory Pick
- + Whse. Shipment
- + Whse. Receipt
- > Edit Item Reclassification Journal
- > Item Tracing
- > Order Status
- > Sales Order Shipping
- Warehouse Bin List
- Physical Inventory List
- Customer Labels
- Power BI Reports

## User Tasks

My User Tasks

Pending User Tasks

0

>

## Email Status

Email Activities

Failed Emails in Outbox	Draft Emails in Outbox	Sent Emails Last 30 Days
0	0	0

## Activities

Outbound - Today		Inbound - Today		Internal
Released Sales... Until Today	Posted Sales S... - Today	Expected Purc... Until Today	Posted Purch. ... - Today	Inventory Picks... Today
0	0	8	1	0

Subcontracting Worksheets

Name: DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Acc... Acti... Mes...	Action Message	Prod. Order No.	Operation No.	Work Center No.	Description	Quantity	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
Item	SHAFT-HT01	<input checked="" type="checkbox"/>	New	101019	020	600	Heat Treat	100	PCS	30000		5.00	11/14/2025
→ Item		<input type="checkbox"/>						0				0.00	

Description

Buy-from Vendor Name

Subcontracting Worksheets

Name ..... DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Acc... Acti... Mes...	Action Message	Prod. Order No.
Item	SHAFT-HT01	<input checked="" type="checkbox"/>	New	101019
→ Item		<input type="checkbox"/>		

Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
	30000		5.00	11/14/2025
			0.00	

### Carry Out Action Msg. - Req.

Use default values from ..... Last used options and filters

---

#### Options

Print Orders .....

OK Cancel

Description

Buy-from Vendor Name

Subcontracting Worksheets

Tell me what you want to do

Don't know what to search for? Try [exploring pages](#) or [exploring reports](#)

Name

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Acc... Acti... Mes...	Action Message	Prod. Order No.	Operation No.	Work Center No.	Description	Quantity	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
→ Item		<input type="checkbox"/>						0				0.00	

Description

Buy-from Vendor Name





Subcontracting Worksheets

Name: DEFAULT

Manage Home Line More options

Calculate Subcontracts... Carry Out Action Message...

Type	No.	Acc... Acti... Mes...	Action Message	Prod. Order No.	Operation No.	Work Center No.	Description	Quantity	Unit of Measure Code	Vendor No.	Vendor Item No.	Direct Unit Cost	Due Date
→ Item		<input type="checkbox"/>						0				0.00	

Released Production Order - 10 x +

businesscentral.dynamics.com/?company=CRONUS%20USA%2C%20Inc.&page=99000831&dc=0&bookmark=1D\_HRUAAACLA...

Google Chrome isn't your default browser [Set as default](#)

Dynamics 365 Business Central

Released Production Order

# 101019 · Heat Treated Steel Shaft

Home | Print | Order | Actions | Related | Reports | Automate | Fewer options

Change Status... Refresh Production Order... Create Inventory P...ay/Pick/Movement... Create Warehouse Pick Update Unit Cost... Replan...

## General

Show less

No.	101019	Quantity	100
Description	Heat Treated Steel Shaft	Due Date	11/15/2025
Description 2		Assigned User ID	
Source Type	Item	Blocked	<input checked="" type="checkbox"/>
Source No.	SHAFT-HT01	Last Date Modified	10/27/2025
Search Description	HEAT TREATED STEEL SHAFT	Reopened	<input type="checkbox"/>
		Manual Scheduling	<input type="checkbox"/>

Lines | [Manage](#) | Functions | [Line](#)

[New Line](#) [Delete Line](#)

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Location Code	Finished Quantity	Remaining Quantity	Production BOM No.	Routing No.
→ SHAFT-HT01	11/15/2025	Heat Treated Steel Shaft	11/12/2025 7:00 ...	11/14/2025 7:00 ...	100	PCS	MAIN	100	0	SHAFT-HT01	SHAFT-HT01

Released Production Orders

+ New Manage Home Order Reports | More options

Change Status... Create Inventory P...ay/Pick/Movement... Create Warehouse Pick Update Unit Cost...

No. #	Description	Source No.	Routing No.	Quantity	Starting Date-Time	Ending Date-Time	Due Date	Assi ID
101002	Airpot	SP-SCM1009	SP-SCM1009-SERIAL	10	6/2/2025 1:52 PM	6/3/2025 4:00 PM	6/4/2025	
101004	Airpot	SP-SCM1009	SP-SCM1009-SERIAL	1	6/3/2025 2:00 PM	6/3/2025 4:00 PM	6/4/2025	
101006	Airpot	SP-SCM1009	SP-SCM1009-SERIAL	3	6/25/2025 3:19 PM	6/26/2025 10:31 ...	6/27/2025	
101007	AutoDrip	SP-SCM1004	SP-SCM1004	2	6/2/2025 1:48 PM	6/2/2025 4:00 PM	6/4/2025	
101014	Reservoir Assembly	SP-BOM2000	SP-BOM2000	1	6/3/2025 7:00 AM	6/3/2025 3:00 AM	6/4/2025	
101019	Heat Treated Steel Shaft	SHAFT-HT01	SHAFT-HT01	100	11/12/2025 7:00 ...	11/14/2025 7:00 ...	11/15/2025	
101020	Machined Shaft	SHAFT-HT01-...	SHAFT-HT01-M	100	11/10/2025 8:50 ...	11/10/2025 11:00...	11/12/2025	

**Documents** ▾

Name File Exter

(There is nothing to show in this view)

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**Notes** +

(There is nothing to show in this view)

# USER STORY 5 – VENDOR CONSIGNED INVENTORY



**As a Purchasing Agent,**



**I want to be able to consume inventory which is stored at my vendor warehouse**



**so that I have less inventory to manage in my company warehouse**



## **Special Notes**

- \*In these two scenarios I run Planning worksheet without Location Filter**
- \*For tracking inventory at or being sent to supplier**

Stockkeeping Unit Card

# MAIN · SHAFT-HT01

Home | Item | SKU | More options

Calculate Counting Period

## General

Item No.	SHAFT-HT01	Shelf No.		Qty. on Sales Order	75
Description	Heat Treated Steel Shaft	Last Date Modified	10/27/2025	Qty. on Service Order	0
Location Code	MAIN	Qty. on Purch. Order	0	Quantity on Hand	0
Variant Code		Qty. on Prod. Order	0	Qty. on Project Order	0
Assembly BOM	No	Qty. in Transit	0	Qty. on Assembly Order	0
		Qty. on Component Lines	0	Qty. on Asm. Component	0

## Invoicing

Standard Cost	0.00	Unit Cost	8.826	Last Direct Cost	12.50
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## Replenishment

Replenishment System	Prod. Order	<b>Production</b>		<b>Assembly</b>	
Lead Time Calculation	3D	Manufacturing Policy	Make-to-Stock	Assembly Policy	Assemble-to-Stock
<b>Purchase</b>		Flushing Method	Manual		
Vendor No.		Components at Location	VENDOR		
Vendor Item No.		Lot Size	0		
<b>Transfer</b>		Routing No.	SHAFT-HT01		
Transfer-from Code		Production BOM No.	SHAFT-HT01		

## Planning

Reordering Policy	Lot-for-Lot	<b>Lot-for-Lot Parameters</b>		<b>Order Modifiers</b>	
Dampener Period		Include Inventory	<input checked="" type="checkbox"/>	Minimum Order Quantity	0
Dampener Quantity	0	Lot Accumulation Period		Maximum Order Quantity	0

Summary Preview

Notes +  
(There is nothing to show in this view)

Stockkeeping Unit Card

# MAIN · SHAFT-HT01

Home | Item | SKU | More options

Calculate Counting Period

## General

Item No.	SHAFT-HT01	Shelf No.		Qty. on Sales Order	75
Description	Heat Treated Steel Shaft	Last Date Modified	10/27/2025	Qty. on Service Order	0
Location Code	MAIN	Qty. on Purch. Order	0	Quantity on Hand	0
Variant Code		Qty. on Prod. Order	0	Qty. on Project Order	0
Assembly BOM	No	Qty. in Transit	0	Qty. on Assembly Order	0
		Qty. on Component Lines	0	Qty. on Asm. Component	0

## Invoicing

Standard Cost	0.00	Unit Cost	8.826	Last Direct Cost	12.50
---------------	------	-----------	-------	------------------	-------

## Replenishment

Replenishment System	Prod. Order	Production	Manufacturing Policy	Make-to-Stock	Assembly	Assembly Policy	Assemble-to-Stock
Lead Time Calculation	3D	Flushing Method	Manual	Components at Location	VENDOR	Lot Size	0
Vendor No.		Routing No.	SHAFT-HT01	Production BOM No.	SHAFT-HT01		
Vendor Item No.							
Transfer							
Transfer-from Code							

## Planning

Reordering Policy	Lot-for-Lot	Lot-for-Lot Parameters	Include Inventory	Order Modifiers	Minimum Order Quantity	0
Dampener Period		Lot Accumulation Period		Maximum Order Quantity		0
Dampener Quantity	0					

Summary Preview

Notes +  
(There is nothing to show in this view)

Stockkeeping Unit Card

# MAIN · SHAFT-HT01

Home | Item | SKU | More options

Calculate Counting Period

## General

Item No.	SHAFT-HT01	Shelf No.		Qty. on Sales Order	75
Description	Heat Treated Steel Shaft	Last Date Modified	10/27/2025	Qty. on Service Order	0
Location Code	MAIN	Qty. on Purch. Order	0	Quantity on Hand	0
Variant Code		Qty. on Prod. Order	0	Qty. on Project Order	0
Assembly BOM	No	Qty. in Transit	0	Qty. on Assembly Order	0
		Qty. on Component Lines	0	Qty. on Asm. Component	0

## Invoicing

Standard Cost	0.00	Unit Cost	8.826	Last Direct Cost	12.50
---------------	------	-----------	-------	------------------	-------

## Replenishment

Replenishment System	Prod. Order	<b>Production</b>		<b>Assembly</b>	
Lead Time Calculation	3D	Manufacturing Policy	Make-to-Stock	Assembly Policy	Assemble-to-Stock
<b>Purchase</b>		Flushing Method	Manual		
Vendor No.		<b>Components at Location</b>	VENDOR		
Vendor Item No.		Lot Size	0		
<b>Transfer</b>		Routing No.	SHAFT-HT01		
Transfer-from Code		Production BOM No.	SHAFT-HT01		

## Planning

Reordering Policy	Lot-for-Lot	<b>Lot-for-Lot Parameters</b>		<b>Order Modifiers</b>	
Dampener Period		Include Inventory	<input checked="" type="checkbox"/>	Minimum Order Quantity	0
Dampener Quantity	0	Lot Accumulation Period		Maximum Order Quantity	0

Summary Preview

Notes +  
(There is nothing to show in this view)

← Planning Worksheets | [Icons]

Name: ..... DEFAULT

[Icons] | Manage Home Prepare Line Item Availability by | More options | [Icons]

[Icons] Calculate Regenerative Plan... [Icons] Get Action Messages... | [Icons]

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
-	SHAFT-HT01	New	<input checked="" type="checkbox"/>		MAIN	11/22/2025	11/19/2025 7:00 AM	11/21/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	75	Prod. Order	101017	Planned
	SHAFT-RM	New	<input checked="" type="checkbox"/>		VENDOR	11/19/2025	11/16/2025 7:00 AM	11/18/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Purchase		

Item Description: Heat Treated Steel Shaft | Routing Description: Heat Treated Steel Shaft

← Planning Worksheets | ✓ Saved | [Icons]

Name: ..... DEFAULT

[Icons] | Manage | Home | Prepare | Line | Item Availability by | More options | [Icons]

**Carry Out Action Message...** | Refresh Planning Line... | Reserve

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
→	⋮	SHAFT-HT01	New	<input checked="" type="checkbox"/>	MAIN	11/22/2025	11/19/2025 7:00 AM	11/21/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	75	Prod. Order	101017	Planned
		SHAFT-RM	New	<input checked="" type="checkbox"/>	VENDOR	11/19/2025	11/16/2025 7:00 AM	11/18/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Purchase		

Item Description: Heat Treated Steel Shaft | Routing Description: Heat Treated Steel Shaft

Planning Worksheets

Name: DEFAULT

Manage Home Prepare Line Item Availability by More options

Carry Out Action Message... Refresh Planning Line... Reserve

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
→	SHAFT-HT01	New	<input checked="" type="checkbox"/>		MAIN		<input checked="" type="checkbox"/>	75	Prod. Order	101017	Planned
	SHAFT-RM	New	<input checked="" type="checkbox"/>		VENDOR		<input type="checkbox"/>	75	Purchase		

### Carry Out Action Msg. - Plan.

Use default values from: **Last used options and filters**

**Options**

Production Order: Firm Planned

Assembly Order:

Purchase Order: Make Purch. Orders

Transfer Order:

Combine Transfer Orders:

Stop and Show First Error:

**OK** **Cancel**

Planning Worksheets

Name: DEFAULT

Manage Home Prepare Line Item Availability by More options

Carry Out Action Message... Refresh Planning Line... Reserve

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
→	SHAFT-HT01	New	<input checked="" type="checkbox"/>		MAIN		<input checked="" type="checkbox"/>	75	Prod. Order	101017	Planned
	SHAFT-RM	New	<input checked="" type="checkbox"/>		VENDOR		<input type="checkbox"/>	75	Purchase		

### Carry Out Action Msg. - Plan.

Use default values from: **Last used options and filters**

**Options**

Production Order: Firm Planned

Assembly Order:

Purchase Order: Make Purch. Orders

Transfer Order:

Combine Transfer Orders:

Stop and Show First Error:

**OK** Cancel



Purchase Orders: All | + New | Manage | Home | Release | Post... | Print/Send | Order | Actions | Related | Queries | Automate | Fewer options

Create Whse. Receipt | Send IC Purchase Order

No.†	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorization No.	Location Code	Assigned User ID	Document Date	Status	Amount	Amount Including Tax
106001	10000	Fabrikam, Inc.				4/5/2025	Open	5,464.90	5,628.85
106002	20000	First Up Consultants				4/6/2025	Open	2,104.20	2,167.33
106003	40000	Wide World Importers				4/10/2025	Open	10,928.40	11,256.25
106004	30000	Graphic Design Institute				5/1/2025	Open	3,660.80	3,770.62
106005	50000	Nod Publishers				4/8/2025	Open	946.00	946.00
106006	20000	First Up Consultants		YELLOW		6/1/2024	Open	0.00	0.00
106007	20000	First Up Consultants		YELLOW		6/1/2024	Open	0.00	0.00
106008	20000	First Up Consultants		WHITE		6/1/2024	Open	30.00	30.00
106009	20000	First Up Consultants				3/1/2024	Released	16,000.00	16,000.00
106010	20000	First Up Consultants				3/1/2024	Released	64,470.00	64,470.00
106011	40000	Wide World Importers				3/1/2024	Released	3,035.00	3,035.00
106012	40000	Wide World Importers				3/1/2024	Released	39,210.00	39,210.00
106013	50000	Nod Publishers				3/1/2024	Released	22,000.00	22,000.00
106014	50000	Nod Publishers				3/1/2024	Released	5,780.00	5,780.00
106015	10000	Fabrikam, Inc.				6/4/2025	Released	16,834.00	16,834.00
106017	64000	Hydropower Powerplant				6/4/2025	Open	332.20	332.20
106018	64000	Hydropower Powerplant				6/4/2025	Open	207.63	207.63
106019	64000	Hydropower Powerplant				6/4/2025	Open	41.53	41.53
106020	10000	Fabrikam, Inc.				6/4/2025	Open	65.00	65.00
106024	82000	Subcontractor				6/4/2025	Released	84.36	84.36
106026	30000	Graphic Design Institute				11/14/2025	Open	85.50	85.50
106028	30000	Graphic Design Institute		MAIN		11/14/2025	Open	565.00	565.00
106029	30000	Graphic Design Institute		VENDOR		11/14/2025	Open	37.50	37.50

**Details** | Attachments (0)

**Vendor Details**

Vendor No. 10000  
 Name Fabrikam, Inc.  
 Phone No. 4255550101  
 Email krystal.york@contoso.com  
 Fax No.  
 Contact Krystal York

Purchase Orders | + New | Manage | Home | Release | Post... | Print/Send | Order | Actions | Related | Queries | Automate | Fewer options

Create Whse. Receipt | Send IC Purchase Order

No.†	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorization No.	Location Code	Assigned User ID	Document Date	Status	Amount	Amount Including Tax
106001	10000	Fabrikam, Inc.				4/5/2025	Open	5,464.90	5,628.85
106002	20000	First Up Consultants				4/6/2025	Open	2,104.20	2,167.33
106003	40000	Wide World Importers				4/10/2025	Open	10,928.40	11,256.25
106004	30000	Graphic Design Institute				5/1/2025	Open	3,660.80	3,770.62
106005	50000	Nod Publishers				4/8/2025	Open	946.00	946.00
106006	20000	First Up Consultants		YELLOW		6/1/2024	Open	0.00	0.00
106007	20000	First Up Consultants		YELLOW		6/1/2024	Open	0.00	0.00
106008	20000	First Up Consultants		WHITE		6/1/2024	Open	30.00	30.00
106009	20000	First Up Consultants				3/1/2024	Released	16,000.00	16,000.00
106010	20000	First Up Consultants				3/1/2024	Released	64,470.00	64,470.00
106011	40000	Wide World Importers				3/1/2024	Released	3,035.00	3,035.00
106012	40000	Wide World Importers				3/1/2024	Released	39,210.00	39,210.00
106013	50000	Nod Publishers				3/1/2024	Released	22,000.00	22,000.00
106014	50000	Nod Publishers				3/1/2024	Released	5,780.00	5,780.00
106015	10000	Fabrikam, Inc.				6/4/2025	Released	16,834.00	16,834.00
106017	64000	Hydropower Powerplant				6/4/2025	Open	332.20	332.20
106018	64000	Hydropower Powerplant				6/4/2025	Open	207.63	207.63
106019	64000	Hydropower Powerplant				6/4/2025	Open	41.53	41.53
106020	10000	Fabrikam, Inc.				6/4/2025	Open	65.00	65.00
106024	82000	Subcontractor				6/4/2025	Released	84.36	84.36
106026	30000	Graphic Design Institute				11/14/2025	Open	85.50	85.50
106028	30000	Graphic Design Institute		MAIN		11/14/2025	Open	565.00	565.00
106029	30000	Graphic Design Institute		VENDOR		11/14/2025	Open	37.50	37.50

Details | Attachments (0)

Vendor Details

Vendor No. 10000  
 Name Fabrikam, Inc.  
 Phone No. 4255550101  
 Email krystal.york@contoso.com  
 Fax No.  
 Contact Krystal York

Purchase Order 106029 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

- Home Prepare Print/Send Request Approval Order More options
- Post... Release... Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

**General**

Vendor Name: Graphic Design Institute Vendor Invoice No.: \* Posting Date: Status: Open

Contact: Bryce Jasso Vendor Shipment No.: Linked with E-Document:

Document Date: 11/14/2025

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Sustainability Account No.	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity
Item	SHAFT-RM		Raw Materials			VENDOR			75	-	LBS	0.50	MIAMI, FL	NONTAXABLE	37.50	75	-	75	

Subtotal Excl. Tax (USD)	37.50	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	37.50	Total Incl. Tax (USD)	37.50

**Invoice Details**

Currency Code: Payment Discount %: 0 On Hold:

Expected Receipt Date: 11/14/2025 Pmt. Discount Date: 11/14/2025 Inbound Whse. Handling Time:

VAT Bus. Posting Group: Tax Liable:  Lead Time Calculation:

Vendor Posting Group: DOMESTIC Tax Area Code: MIAMI, FL Requested Receipt Date:

Payment Terms Code: CM Tax Exemption No.: Promised Receipt Date:

Payment Method Code: Shipment Method Code: IRS 1099 Code:

Purchase Order 106029 · Graphic Design Institute  
Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again  
Home Prepare Print/Send Request Approval Order More options

- Post...
- Release
- Create Whse. Receipt
- Create Inventory Put-away/Pick...
- Send Intercompany Purchase Order
- Archive Document

**General**

Vendor Name	Graphic Design Institute	Vendor Invoice No.	*	Status	Open
Contact	Bryce Jasso	Posting Date		Linked with E-Document	<input type="checkbox"/>
Document Date	11/14/2025	Vendor Shipment No.			

Lines Manage Line Functions Order

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Sustainability Account No.	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity
Item	SHAFT-RM		Raw Materials			VENDOR			75		LBS	0.50	MIAMI, FL	NONTAXABLE	37.50	75		75	

Subtotal Excl. Tax (USD)	37.50	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	37.50	Total Incl. Tax (USD)	37.50

**Invoice Details**

Currency Code		Payment Discount %	0	On Hold	
Expected Receipt Date		Pmt. Discount Date	11/14/2025	Inbound Whse. Handling Time	
VAT Bus. Posting Group		Tax Liable	<input checked="" type="checkbox"/>	Lead Time Calculation	
Vendor Posting Group	DOMESTIC	Tax Area Code	MIAMI, FL	Requested Receipt Date	
Payment Terms Code	CM	Tax Exemption No.		Promised Receipt Date	
Payment Method Code		Shipment Method Code		IRS 1099 Code	

Purchase Order  
 106029 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

- Home Prepare Print/Send Request Approval Order More options
- Post... Release... Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

**General** Show more

Vendor Name: Graphic Design Institute  
 Vendor Invoice No.: \*  
 Status: Open

Contact: Bryce Jasso  
 Posting Date: 11/6/2025  
 Linked with E-Document:

Document Date: 11/14/2025  
 Vendor Shipment No.: 543123

Lines Manage Line Functions Order Show more

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Sustainability Account No.	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity
Item	SHAFT-RM		Raw Materials			VENDOR			75	-	LBS	0.50	MIAMI, FL	NONTAXABLE	37.50	75	-	75	

Subtotal Excl. Tax (USD)	37.50	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	37.50	Total Incl. Tax (USD)	37.50

**Invoice Details** Show less

Currency Code:   
 Expected Receipt Date:   
 VAT Bus. Posting Group:   
 Vendor Posting Group: DOMESTIC  
 Payment Terms Code: CM  
 Payment Method Code:   
 Payment Discount %: 0  
 Pmt. Discount Date: 11/14/2025  
 Tax Liable:   
 Tax Area Code: MIAMI, FL  
 Tax Exemption No.:   
 Shipment Method Code:   
 On Hold:   
 Inbound Whse. Handling Time:   
 Lead Time Calculation:   
 Requested Receipt Date:   
 Promised Receipt Date:   
 IRS 1099 Code:

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

- Home
  - Prepare
  - Print/Send
  - Request Approval
  - Order
  - More options
- Post...
  - Release
  - Create Whse. Receipt
  - Create Inventory Put-away/Pick...
  - Send Intercompany Purchase Order
  - Archive Document

General Show more

Vendor Name: Graphic Design Institute

Vendor Invoice No.:

Status: Open

Contact: Bryce Jasso

Posting Date: 11/6/2025

Linked with E-Document:

Document Date: 11/14/2025

Vendor Shipment No.: 543123

Lines [Manage](#) Line Functions Order Show more

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Sustainability Account No.	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Excl. Tax	Tax Area Code	Tax Group Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity
Item	SHAFT-RM		Raw Materials			VENDOR			75	-	LBS	0.50	MIAMI, FL	NONTAXABLE	37.50	75	-	75	

Subtotal Excl. Tax (USD)	37.50	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	37.50	Total Incl. Tax (USD)	37.50

Invoice Details Show less

Currency Code:

Expected Receipt Date:

VAT Bus. Posting Group:

Vendor Posting Group: DOMESTIC

Payment Terms Code: CM

Payment Method Code:

Payment Discount %: 0

Pmt. Discount Date: 11/14/2025

Tax Liable:

Tax Area Code: MIAMI, FL

Tax Exemption No.:

Shipment Method Code:

On Hold:

Inbound Whse. Handling Time:

Lead Time Calculation:

Requested Receipt Date:

Promised Receipt Date:

IRS 1099 Code:

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

Home Prepare Print/Send Request Approval Order More options  
Post... Release... Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

General Show more

Vendor Name: Graphic Design Institute  
Vendor Invoice No.: \*  
Status: Open  
Contact: Bryce Jasso  
Posting Date: 11/6/2025  
Linked with E-Document:   
Document Date: 11/14/2025  
Vendor Shipment No.: 543123

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Item Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity Inv
Item	SHAFT-RM		Raw Materials			VENDOR		0.50	MIAMI, FL	NONTAXABLE	37.50	75	-	75	

Receive  
 Invoice  
 Receive and Invoice  
OK Cancel

Subtotal Excl. Tax (USD): 37.50  
Inv. Discount Amount (USD): 0.00  
Invoice Discount %: 0  
Total Excl. Tax (USD): 37.50  
Total Tax (USD): 0.00  
Total Incl. Tax (USD): 37.50

Invoice Details Show less

Currency Code:   
Expected Receipt Date:   
VAT Bus. Posting Group:   
Vendor Posting Group: DOMESTIC  
Payment Terms Code: CM  
Payment Method Code:   
Payment Discount %: 0  
Pmt. Discount Date: 11/14/2025  
Tax Liab:   
Tax Area Code: MIAMI, FL  
Tax Exemption No.:   
Shipment Method Code:   
On Hold:   
Inbound Whse. Handling Time:   
Lead Time Calculation:   
Requested Receipt Date:   
Promised Receipt Date:   
IRS 1099 Code:

Purchase Order  
 106029 · Graphic Design Institute

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

Home Prepare Print/Send Request Approval Order More options  
 Post... Reopen Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

**General**

Vendor Name: Graphic Design Institute Vendor Invoice No.: \* Posting Date: 11/6/2025 Status: Released  
 Contact: Bryce Jasso Document Date: 11/14/2025 Vendor Shipment No.: 543123  
 Linked with E-Document:

Lines Manage Line Functions Order  
 Item Availability by Reservation Entries Item Tracking Lines Dimensions Comments Item Charge Assignment Document Line Tracking Deferral Schedule Redistribute Account Allocations Generate lines from...ation Account Line Attachments

No.	Item Reference No.	Description	Work Center No.	Prod. Order No.	Location Code	Bin Code	Sustainability Account No.	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity
SHAFT-RM		Raw Materials			VENDOR			75		LBS	0.50	MIAMI, FL	NONTAXABLE	37.50		75	75	

Subtotal Excl. Tax (USD)	37.50	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount (USD)	0.00	Total Excl. Tax (USD)	37.50	Total Incl. Tax (USD)	37.50

**Invoice Details**

Currency Code: Payment Discount %: 0 On Hold:  
 Expected Receipt Date: Pmt. Discount Date: 11/14/2025 Inbound Whse. Handling Time:  
 VAT Bus. Posting Group: Tax Liable:  Lead Time Calculation:  
 Vendor Posting Group: DOMESTIC Tax Area Code: MIAMI, FL Requested Receipt Date:  
 Payment Terms Code: CM Tax Exemption No.: Promised Receipt Date:  
 Payment Method Code: Shipment Method Code: IRS 1099 Code:

Purchase Order  
Item Availability by Location - SHAFT-RM · Raw Materials

Options

View by Day View as Net Change Date Filter 11/19/25

Lines

Code	Name	Gross Requirement	Scheduled Receipt	Planned Receipt	Qty. on Hand	Projected Available Balance	Planned Order Releases
→ -	(Unspecified Location)	0	0	0	0	0	0
EAST	East Warehouse	0	0	0	0	0	0
IN-TRANSIT	In-Transit Inventory	0	0	0	0	0	0
MAIN	Main Warehouse	0	0	0	0	0	0
OUT. LOG.	Outsourced Logistics	0	0	0	0	0	0
OWN LOG.	Own Logistics	0	0	0	0	0	0
SILVER	Silver Warehouse	0	0	0	0	0	0
VENDOR		75	0	0	75	0	0
WEST	West Warehouse	0	0	0	0	0	0
WHITE	White Warehouse	0	0	0	0	0	0
YELLOW	Yellow Warehouse	0	0	0	0	0	0

OK Cancel

Payment Method Code Shipment Method Code IRS 1099 Code

Firm Planned Prod. Orders

+ New Manage Reports Update Unit Cost... Change Status Statistics More options

No. ↑	Description	Source No.	Routing No.	Quantity	Starting Date-Time	Ending Date-Time	Due Date	Assigned User ID	Status ↑	Search Description
<a href="#">101021</a>	Heat Treated Steel Shaft	SHAFT-HTQ1	SHAFT-HTQ1	75	11/19/2025 7:00 AM	11/21/2025 7:00 AM	11/22/2025		Firm Planned	HEAT TREATED ST...

Documents

Name	File Extension
(There is nothing to show in this view)	

Notes

(There is nothing to show in this view)

Firm Planned Prod. Orders

+ New Manage Reports Update Unit Cost... Change Status Statistics More options

No. ↑	Description	Source No.	Routing No.	Quantity	Starting Date-Time	Ending Date-Time	Due Date	Assigned User ID	Status ↑	Search Description
101021	Heat Treated Steel Shaft	SHAFT-HTQ1	SHAFT-HTQ1	75	11/19/2025 7:00 AM	11/21/2025 7:00 AM	11/22/2025		Firm Planned	HEAT TREATED ST...

Documents

Name	File Extension
(There is nothing to show in this view)	

Notes

(There is nothing to show in this view)

Firm Planned Prod. Order

# 101021 · Heat Treated Steel Shaft

Home | Print | Order | Actions | Related | Reports | Automate | Fewer options

Change Status... Refresh Production Order... Replan...

**General** Show more

No. ....	<input type="text" value="101021"/>	Source No. ....	<input type="text" value="SHAFT-HT01"/>	Due Date ....	<input type="text" value="11/22/2025"/>
Description	<input type="text" value="Heat Treated Steel Shaft"/>	Search Description	<input type="text" value="HEAT TREATED STEEL SHAFT"/>	Assigned User ID	<input type="text"/>
Description 2	<input type="text"/>	Quantity	<input type="text" value="75"/>	Last Date Modified	<input type="text" value="10/29/2025"/>
Source Type	<input type="text" value="Item"/>				

Lines | Manage | Functions | Line

Item Availability by | Reservation Entries | Dimensions | Routing | **Components** | Attachments | Item Tracking Lines

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Production BOM No.	Routing No.	Unit Cost	Cost Amount
→ SHAFT-HT01	11/22/2025	Heat Treated Steel Shaft	11/19/2025 7:00 AM	11/21/2025 7:00 AM	75	PCS	SHAFT-HT01	SHAFT-HT01	8.826	661.95

**Schedule** > 11/19/2025 7:00 AM 11/21/2025 7:00 AM

**Posting** > RESALE MAIN

**Summary** Preview

**Documents** ▾

Name	File Extension
(There is nothing to show in this view)	

**Notes** +

(There is nothing to show in this view)







**As a Purchasing Agent,**



**I want to be able to send raw material to the supplier and consume from there**



**so that I know what is at my physical location**

Item Card

# SHAFT-RM · Raw Materials

Home Request Approval Item Templates Prices & Discounts Actions Related Reports Automate Fewer options

Copy Item Apply Template

**Item** Show less

No.	SHAFT-RM	Base Unit of Measure	LBS	Automatic Ext. Text	<input type="checkbox"/>
Description	Raw Materials	Item Category Code		Purchasing Code	
Blocked	<input type="checkbox"/>	Service Item Group		Variant Mandatory if Exists	Default (Yes)
Type	Inventory				

**Inventory** Show less

Shelf No.		Qty. on Component Lines	0	Stockout Warning	Default (Yes)
Created From Catalog Item	<input type="checkbox"/>	Qty. on Sales Order	0	Prevent Negative Inventory	Default (Yes)
Search Description	RAW MATERIALS	Qty. on Service Order	0	Net Weight	0
Inventory	0	Qty. on Project Order	0	Gross Weight	0
Qty. on Purch. Order	0	Qty. on Assembly Order	0	Over-Receipt Code	
Qty. on Prod. Order	0	Qty. on Asm. Component	0		

**Costs & Posting** Show more

<b>Cost Details</b>	<b>Posting Details</b>
Costing Method	Gen. Prod. Posting Group
FIFO	RETAIL
Standard Cost	Tax Group Code
0.00	NONTAXABLE
Unit Cost	Inventory Posting Group
0.50	RESALE
Net Invoiced Qty.	Foreign Trade
0	Tariff No.
Cost is Adjusted	
<input type="checkbox"/>	
Purchase Prices & Discounts	
Create New...	

**Prices & Sales** 0.00

**Summary** Preview

Copilot uses AI to gather valuable insights from data you already have access to.

[See terms](#) | [Learn more](#)

[Start summarizing](#)

[Details](#) [Attachments \(0\)](#)



**Item Attributes**

Attribute	Value
(There is nothing to show in this view)	

**Forecast**

AI generated suggestions may not always be accurate. Please validate results for correctness before using content provided.

Item Card

# SHAFT-RM · Raw Materials

Home Request Approval Item Templates Prices & Discounts Actions Related Reports Automate Fewer options

Copy Item Apply Template

## Replenishment

Replenishment System	Purchase	Production	Assembly
Lead Time Calculation	2D	Manufacturing Policy	Make-to-Stock
Purchase		Routing No.	Assembly Policy
Vendor No.	30000	Production BOM No.	Assemble-to-Stock
Vendor Item No.		Rounding Precision	Assembly BOM
Purch. Unit of Measure	LBS	Flushing Method	No
Purchasing Blocked	<input type="checkbox"/>	Scrap %	
Usage Data Supplier Reference Exists	No	Lot Size	
		Allow Whse. Overpick	
		Production Blocked	

## Planning

Reordering Policy	Lot-for-Lot	Lot-for-Lot Parameters	Order Modifiers
Stockkeeping Unit Exists	Yes	Include Inventory	Minimum Order Quantity
Dampener Period		Lot Accumulation Period	Maximum Order Quantity
Dampener Quantity	0	Rescheduling Period	Order Multiple
Critical	<input type="checkbox"/>	Reorder-Point Parameters	
Safety Lead Time		Reorder Point	
Safety Stock Quantity	0	Reorder Quantity	
		Maximum Inventory	

## Item Tracking

Item Tracking Code		Serial Nos.		Lot Nos.	
--------------------	--	-------------	--	----------	--

**Summary** Preview

Copilot uses AI to gather valuable insights from data you already have access to.

[See terms](#) | [Learn more](#)

**Start summarizing**

**Details** Attachments (0)



Item Attributes

Attribute	Value
(There is nothing to show in this view)	

**Forecast**

AI generated suggestions may not always be accurate. Please validate results for correctness before using content provided.

Stockkeeping Units

+ New Manage Item Item Availability by Reports More options

Item No. ↑	Variant Code ↑	Location Code ↑	Replenishment System	Description	Quantity on Hand
SHAFT-RM	:	MAIN	Purchase	Raw Materials	0
SHAFT-RM		VENDOR	Transfer	Raw Materials	0

Notes +  
(There is nothing to show in this view)

Stockkeeping Unit Card



Saved

# MAIN · SHAFT-RM

Home Item SKU More options

Calculate Counting Period

Location Code	MAIN	Qty. on Purch. Order	0	Quantity on Hand	0
Variant Code		Qty. on Prod. Order	0	Qty. on Project Order	0
Assembly BOM	No	Qty. in Transit	0	Qty. on Assembly Order	0
		Qty. on Component Lines	0	Qty. on Asm. Component	0

## Invoicing

Standard Cost	0.00	Unit Cost	0.50	Last Direct Cost	0.50
---------------	------	-----------	------	------------------	------

## Replenishment

Replenishment System	Purchase	Production	Assembly
Lead Time Calculation	2D	Manufacturing Policy	Make-to-Stock
Purchase		Flushing Method	Manual
Vendor No.	30000	Components at Location	
Vendor Item No.		Lot Size	0
Transfer		Routing No.	
Transfer-from Code		Production BOM No.	

## Planning

Reordering Policy	Lot-for-Lot	Lot-for-Lot Parameters	Order Modifiers
Dampener Period		Include Inventory	Minimum Order Quantity
Dampener Quantity	0	Lot Accumulation Period	Maximum Order Quantity
Safety Lead Time		Rescheduling Period	Order Multiple
Safety Stock Quantity	0	Reorder-Point Parameters	
		Reorder Point	

Summary Preview

Notes +  
(There is nothing to show in this view)

Stockkeeping Unit Card  
MAIN · SHAFT-RM  
Home | Item | SKU | More options

Calculate Counting Period

Location Code	MAIN	Qty. on Purch. Order	0	Quantity on Hand	0
Variant Code		Qty. on Prod. Order	0	Qty. on Project Order	0
Assembly BOM	No	Qty. in Transit	0	Qty. on Assembly Order	0
		Qty. on Component Lines	0	Qty. on Asm. Component	0

Invoicing

Standard Cost	0.00	Unit Cost	0.50	Last Direct Cost	0.50
---------------	------	-----------	------	------------------	------

Replenishment

Replenishment System	Purchase	Production	Manufacturing Policy	Make-to-Stock	Assembly	Assembly Policy	Assemble-to-Stock			
Lead Time Calculation	2D	Flushing Method	Manual	Components at Location	Lot Size	0	Routing No.		Production BOM No.	
Purchase	Vendor No.	30000	Vendor Item No.	Transfer	Transfer-from Code					

Planning

Reordering Policy	Lot-for-Lot	Lot-for-Lot Parameters	Include Inventory	Order Modifiers	Minimum Order Quantity	0
Dampener Period		Lot Accumulation Period		Maximum Order Quantity	0	
Dampener Quantity	0	Rescheduling Period		Order Multiple	0	
Safety Lead Time		Reorder-Point Parameters	Reorder Point			
Safety Stock Quantity	0					

Summary Preview

Notes +

(There is nothing to show in this view)

Stockkeeping Unit Card



Saved

# MAIN · SHAFT-RM

Home Item SKU More options

## Calculate Counting Period

Location Code	MAIN	Qty. on Purch. Order	0	Quantity on Hand	0
Variant Code		Qty. on Prod. Order	0	Qty. on Project Order	0
Assembly BOM	No	Qty. in Transit	0	Qty. on Assembly Order	0
		Qty. on Component Lines	0	Qty. on Asm. Component	0

## Invoicing

Standard Cost	0.00	Unit Cost	0.50	Last Direct Cost	0.50
---------------	------	-----------	------	------------------	------

## Replenishment

Replenishment System	Purchase	Production	Assembly
Lead Time Calculation	2D	Manufacturing Policy	Make-to-Stock
Purchase		Flushing Method	Manual
Vendor No.	30000	Components at Location	
Vendor Item No.		Lot Size	0
Transfer		Routing No.	
Transfer-from Code		Production BOM No.	

## Planning

Reordering Policy	Lot-for-Lot	Lot-for-Lot Parameters	Order Modifiers
Dampener Period		Include Inventory	Minimum Order Quantity
Dampener Quantity	0	Lot Accumulation Period	Maximum Order Quantity
Safety Lead Time		Rescheduling Period	Order Multiple
Safety Stock Quantity	0	Reorder-Point Parameters	
		Reorder Point	

## Summary

Notes +  
(There is nothing to show in this view)

Stockkeeping Unit Card



Saved

# VENDOR · SHAFT-RM

Home Item SKU More options

Calculate Counting Period

## General

Item No.	SHAFT-RM	Shelf No.		Qty. on Sales Order	0
Description	Raw Materials	Last Date Modified	10/27/2025	Qty. on Service Order	0
Location Code	VENDOR	Qty. on Purch. Order	0	Quantity on Hand	0
Variant Code		Qty. on Prod. Order	0	Qty. on Project Order	0
Assembly BOM	No	Qty. in Transit	0	Qty. on Assembly Order	0
		Qty. on Component Lines	0	Qty. on Asm. Component	0

## Invoicing

Standard Cost	0.00	Unit Cost	0.50	Last Direct Cost	0.50
---------------	------	-----------	------	------------------	------

## Replenishment

Replenishment System	Transfer	<b>Production</b>		<b>Assembly</b>	
Lead Time Calculation	2D	Manufacturing Policy	Make-to-Stock	Assembly Policy	Assemble-to-Stock
<b>Purchase</b>		Flushing Method	Manual		
Vendor No.	30000	Components at Location			
Vendor Item No.		Lot Size	0		
<b>Transfer</b>		Routing No.			
Transfer-from Code	MAIN	Production BOM No.			

## Planning

Reordering Policy	Lot-for-Lot	<b>Lot-for-Lot Parameters</b>		<b>Order Modifiers</b>	
Dampener Period		Include Inventory	<input checked="" type="checkbox"/>	Minimum Order Quantity	0
Dampener Quantity	0	Lot Accumulation Period		Maximum Order Quantity	0

Summary Preview

Notes +  
(There is nothing to show in this view)

Stockkeeping Unit Card



Saved

# VENDOR · SHAFT-RM

Home | Item | SKU | More options

Calculate Counting Period

## General

Item No. ....	SHAFT-RM	Shelf No. ....		Qty. on Sales Order .....	0
Description .....	Raw Materials	Last Date Modified .....	10/27/2025	Qty. on Service Order .....	0
Location Code .....	VENDOR	Qty. on Purch. Order .....	0	Quantity on Hand .....	0
Variant Code .....		Qty. on Prod. Order .....	0	Qty. on Project Order .....	0
Assembly BOM .....	No	Qty. in Transit .....	0	Qty. on Assembly Order .....	0
		Qty. on Component Lines .....	0	Qty. on Asm. Component .....	0

## Invoicing

Standard Cost .....	0.00	Unit Cost .....	0.50	Last Direct Cost .....	0.50
---------------------	------	-----------------	------	------------------------	------

## Replenishment

Replenishment System .....	Transfer	<b>Production</b>		<b>Assembly</b>	
Lead Time Calculation .....	2D	Manufacturing Policy .....	Make-to-Stock	Assembly Policy .....	Assemble-to-Stock
<b>Purchase</b>		Flushing Method .....	Manual		
Vendor No. ....	30000	Components at Location .....			
Vendor Item No. ....		Lot Size .....	0		
<b>Transfer</b>		Routing No. ....			
Transfer-from Code .....	MAIN	Production BOM No. ....			

## Planning

Reordering Policy .....	Lot-for-Lot	<b>Lot-for-Lot Parameters</b>		<b>Order Modifiers</b>	
Dampener Period .....		Include Inventory .....	<input checked="" type="checkbox"/>	Minimum Order Quantity .....	0
Dampener Quantity .....	0	Lot Accumulation Period .....		Maximum Order Quantity .....	0

Summary Preview

Notes +  
(There is nothing to show in this view)

Stockkeeping Unit Card

# VENDOR · SHAFT-RM

Home | Item | SKU | More options

Calculate Counting Period

## General

Item No. ....	SHAFT-RM	Shelf No. ....		Qty. on Sales Order .....	0
Description .....	Raw Materials	Last Date Modified .....	10/27/2025	Qty. on Service Order .....	0
Location Code .....	VENDOR	Qty. on Purch. Order .....	0	Quantity on Hand .....	0
Variant Code .....		Qty. on Prod. Order .....	0	Qty. on Project Order .....	0
Assembly BOM .....	No	Qty. in Transit .....	0	Qty. on Assembly Order .....	0
		Qty. on Component Lines .....	0	Qty. on Asm. Component .....	0

## Invoicing

Standard Cost .....	0.00	Unit Cost .....	0.50	Last Direct Cost .....	0.50
---------------------	------	-----------------	------	------------------------	------

## Replenishment

Replenishment System .....	Transfer	Production	Assembly
Lead Time Calculation .....	2D	Manufacturing Policy .....	Make-to-Stock
Purchase		Flushing Method .....	Manual
Vendor No. ....	30000	Components at Location .....	
Vendor Item No. ....		Lot Size .....	0
Transfer		Routing No. ....	
Transfer-from Code .....	MAIN	Production BOM No. ....	

## Planning

Reordering Policy .....	Lot-for-Lot	Lot-for-Lot Parameters	Order Modifiers
Dampener Period .....		Include Inventory .....	Minimum Order Quantity .....
Dampener Quantity .....	0	Lot Accumulation Period .....	Maximum Order Quantity .....

Summary Preview

Notes +  
(There is nothing to show in this view)

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. [Enable this for me](#) | [Don't show again](#)

Home Prepare Print/Send Request Approval Order Report Actions Related Automate Fewer options  
Post... Release... Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

Order Date: 10/19/2025 Customer Name: Krowmat Inc Status: Open  
Contact: Meagan Bond

Lines Manage Line Order  
New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Amount Including Tax	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Shipment Date	Department Code	Customergroup Code
Item	SHAFT-HT01	Heat Treated Steel Shaft	MAIN	100	PCS	10.00	1,000.00		100	100	-	11/15/2025	SALES	LARGE
Item	SHAFT-HT01	Heat Treated Steel Shaft	MAIN	75	PCS	9.50	712.50	75	-	75	-	11/22/2025	SALES	LARGE

Subtotal Excl. Tax (USD) 1,712.50 Invoice Discount % 0 Total Tax (USD) 0.00  
 Inv. Discount Amount Excl. Tax (USD) 0.00 Total Excl. Tax (USD) 1,712.50 Total Incl. Tax (USD) 1,712.50

Invoice Details Show less

Currency Code: [Dropdown] Due Date: 10/31/2025 Customergroup Code: LARGE  
 Gen. Bus. Posting Group: DOMESTIC Tax Liab:  Pmt. Discount Date: 10/27/2025  
 Customer Posting Group: DOMESTIC Tax Area Code: MIAMI, FL  
 Payment Terms Code: CM Department Code: SALES

Shipping and Billing Show less

Ship-to: Default (Sell-to Address) Bill-to: Default (Customer) Late Order Shipping: No  
 Contact: Meagan Bond Location Code: [Dropdown]

← Planning Worksheets | ✓ Saved | [Icons]

Name: ..... DEFAULT

Manage Home Prepare Line Item Availability by More options | Calculate Regenerative Plan... Get Action Messages...

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
	SHAFT-HT01	New	<input checked="" type="checkbox"/>		MAIN	11/22/2025	11/19/2025 7:00 AM	11/21/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	75	Prod. Order	101016	Planned
→	SHAFT-RM	New	<input checked="" type="checkbox"/>		VENDOR	11/19/2025	11/19/2025 7:00 AM	11/19/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Transfer		
	SHAFT-RM	New	<input checked="" type="checkbox"/>		MAIN	11/19/2025	11/16/2025 7:00 AM	11/18/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Purchase		

Item Description | Raw Materials | Routing Description

Name: ..... DEFAULT

[Manage](#) | [Home](#) | [Prepare](#) | [Line](#) | [Item Availability by](#) | [More options](#)

[Calculate Regenerative Plan...](#) | [Get Action Messages...](#)

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
	SHAFT-HT01	New	<input checked="" type="checkbox"/>		MAIN	11/22/2025	11/19/2025 7:00 AM	11/21/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	75	Prod. Order	101016	Planned
→	SHAFT-RM	New	<input checked="" type="checkbox"/>		VENDOR	11/19/2025	11/19/2025 7:00 AM	11/19/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Transfer		
	SHAFT-RM	New	<input checked="" type="checkbox"/>		MAIN	11/19/2025	11/16/2025 7:00 AM	11/18/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Purchase		

Item Description | Raw Materials | Routing Description

← Planning Worksheets | [Icons]

Name: ..... DEFAULT

[Icons] | Manage Home Prepare Line Item Availability by | More options | [Icons]

[Icons] Calculate Regenerative Plan... [Icons] Get Action Messages... | [Icon]

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
	SHAFT-HT01	New	<input checked="" type="checkbox"/>		MAIN	11/22/2025	11/19/2025 7:00 AM	11/21/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	75	Prod. Order	101016	Planned
→	SHAFT-RM	New	<input checked="" type="checkbox"/>		VENDOR	11/19/2025	11/19/2025 7:00 AM	11/19/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Transfer		
	SHAFT-RM	New	<input checked="" type="checkbox"/>		MAIN	11/19/2025	11/16/2025 7:00 AM	11/18/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Purchase		

Item Description | Raw Materials | Routing Description

← Planning Worksheets: [Saved] [Icons]

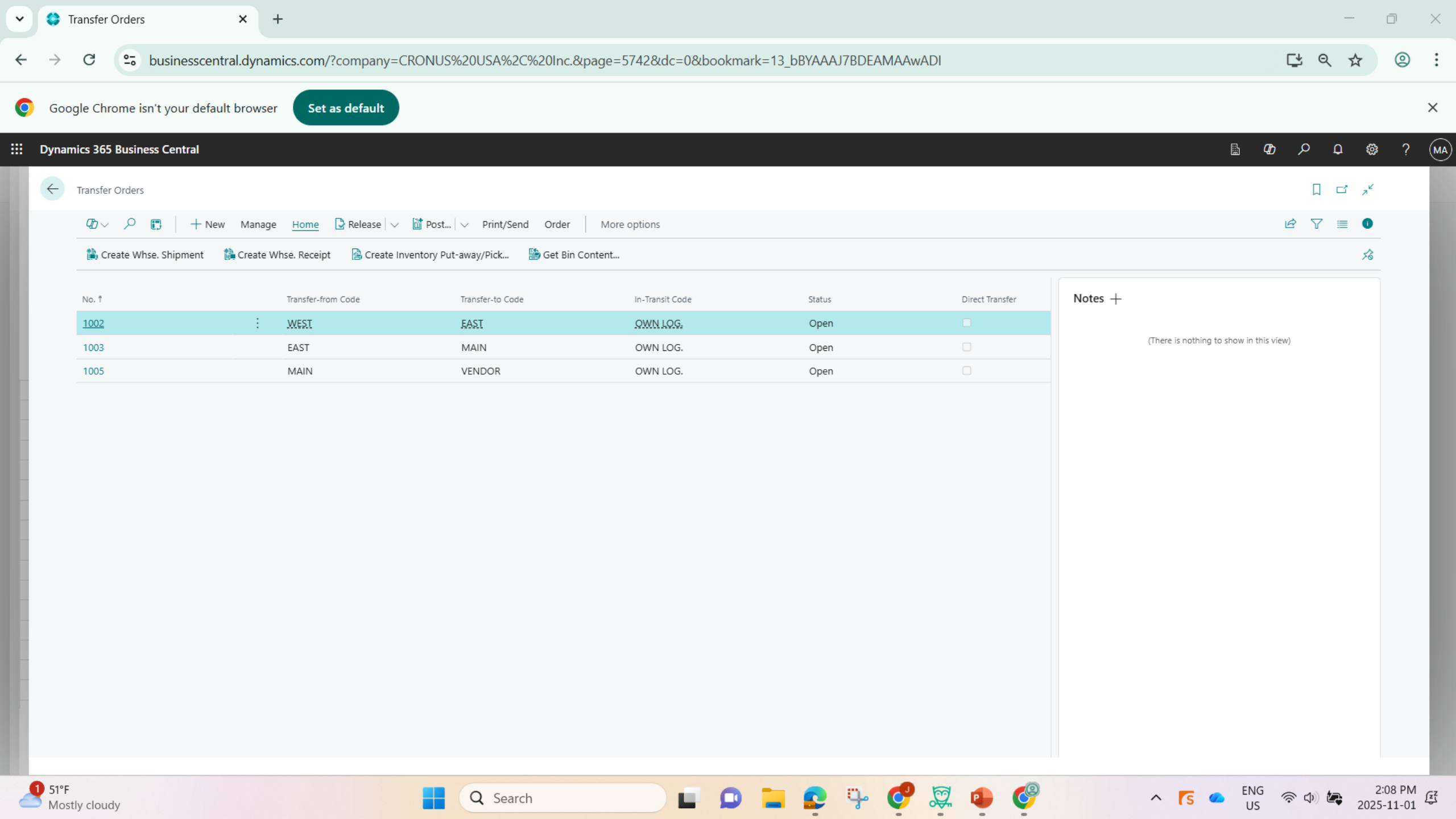
Name: ..... DEFAULT

[Icons] | Manage Home Prepare Line Item Availability by | More options [Icons]

[Icons] Calculate Regenerative Plan... [Icons] Get Action Messages... [Icons]

Warning	No.	Action Message	Accept Action Message	Original Due Date	Location Code	Due Date	Starting Date-Time	Ending Date-Time	Description	Original Quantity	MPS Order	Quantity	Ref. Order Type	Ref. Order No.	Ref. Order Status
	SHAFT-HT01	New	<input checked="" type="checkbox"/>		MAIN	11/22/2025	11/19/2025 7:00 AM	11/21/2025 7:00 AM	Heat Treated Steel Shaft		<input checked="" type="checkbox"/>	75	Prod. Order	101016	Planned
→	SHAFT-RM	New	<input checked="" type="checkbox"/>		VENDOR	11/19/2025	11/19/2025 7:00 AM	11/19/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Transfer		
	SHAFT-RM	New	<input checked="" type="checkbox"/>		MAIN	11/19/2025	11/16/2025 7:00 AM	11/18/2025 7:00 AM	Raw Materials		<input type="checkbox"/>	75	Purchase		

Item Description | Raw Materials | Routing Description



Transfer Orders

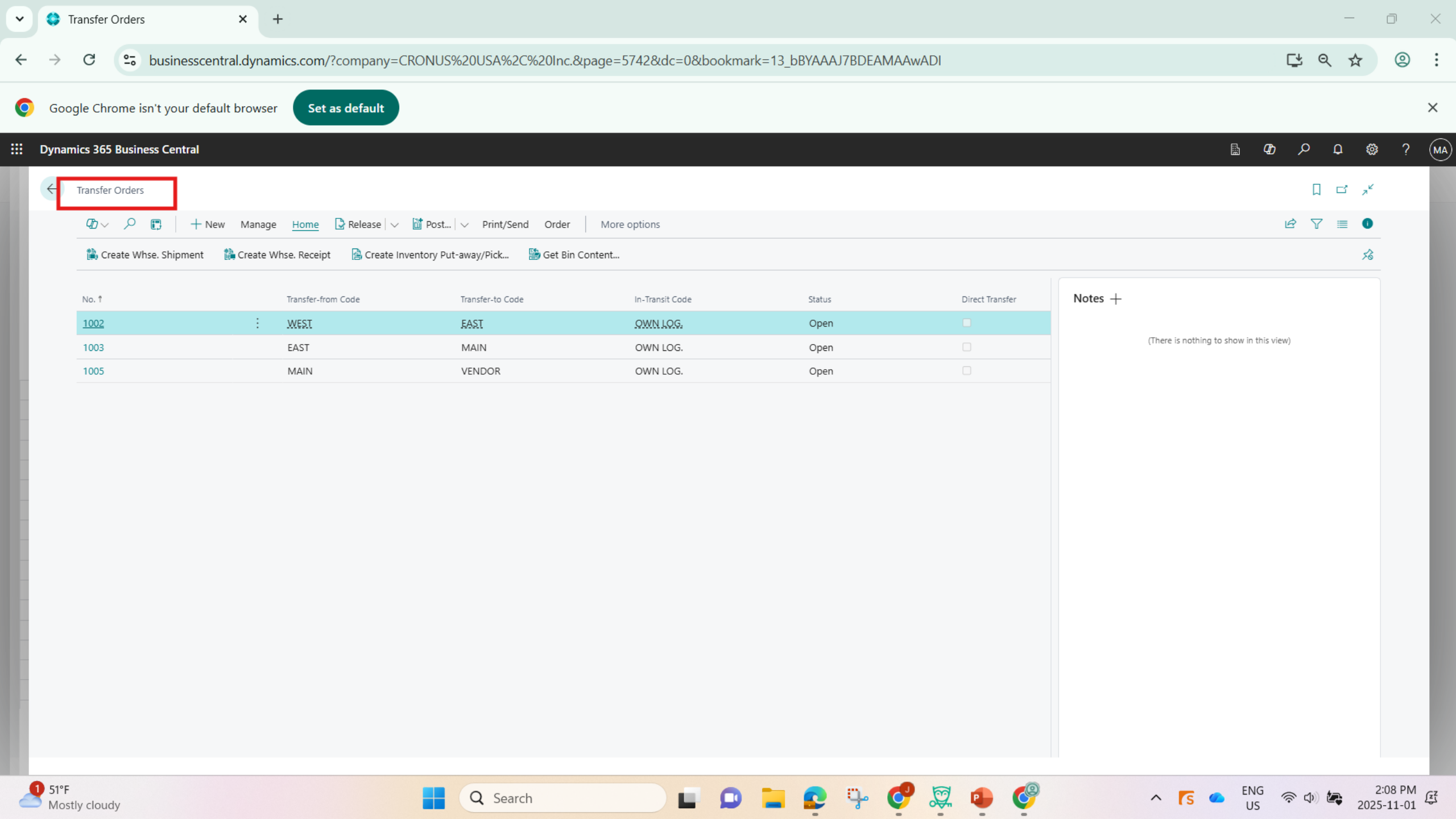
+ New Manage Home Release Post... Print/Send Order More options

Create Whse. Shipment Create Whse. Receipt Create Inventory Put-away/Pick... Get Bin Content...

No. ↑	Transfer-from Code	Transfer-to Code	In-Transit Code	Status	Direct Transfer
1002	WEST	EAST	OWN LOG.	Open	<input type="checkbox"/>
1003	EAST	MAIN	OWN LOG.	Open	<input type="checkbox"/>
1005	MAIN	VENDOR	OWN LOG.	Open	<input type="checkbox"/>

Notes +

(There is nothing to show in this view)



Transfer Orders

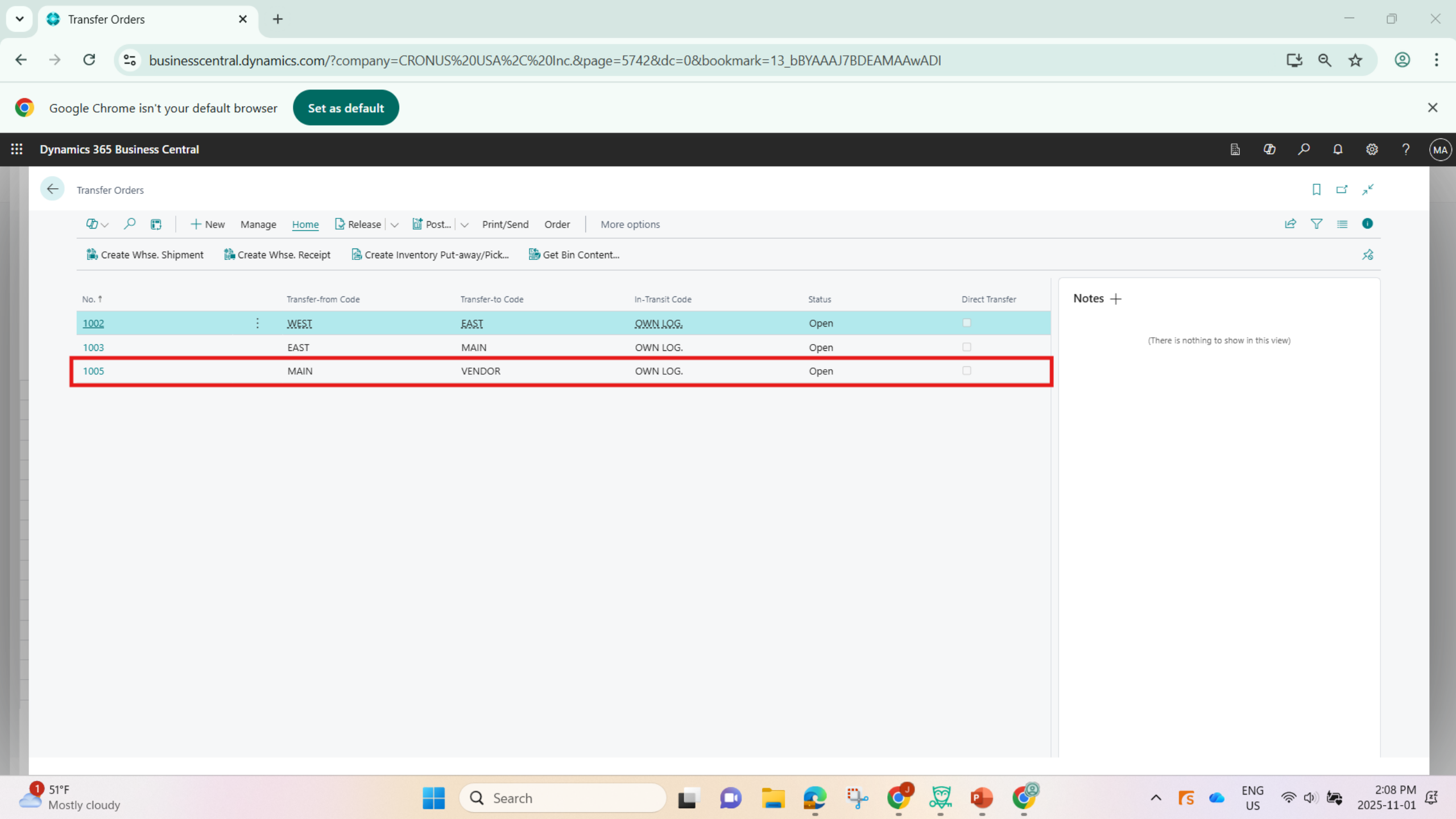
+ New Manage Home Release Post... Print/Send Order More options

Create Whse. Shipment Create Whse. Receipt Create Inventory Put-away/Pick... Get Bin Content...

No. ↑	Transfer-from Code	Transfer-to Code	In-Transit Code	Status	Direct Transfer
1002	WEST	EAST	OWN LOG.	Open	<input type="checkbox"/>
1003	EAST	MAIN	OWN LOG.	Open	<input type="checkbox"/>
1005	MAIN	VENDOR	OWN LOG.	Open	<input type="checkbox"/>

**Notes** +

(There is nothing to show in this view)



No. ↑	Transfer-from Code	Transfer-to Code	In-Transit Code	Status	Direct Transfer
1002	WEST	EAST	OWN LOG.	Open	<input type="checkbox"/>
1003	EAST	MAIN	OWN LOG.	Open	<input type="checkbox"/>
1005	MAIN	VENDOR	OWN LOG.	Open	<input type="checkbox"/>

Notes +

(There is nothing to show in this view)

General Show more

Transfer-from Code MAIN Direct Transfer  Posting Date 11/19/2025  
Transfer-to Code VENDOR In-Transit Code Status Open

Lines Manage Functions Line Share Print

New Line Delete Line Select items...

Item No.	Description	Quantity	Reserved Quantity Inbnd.	Reserved Quantity Shipped	Reserved Quantity Outbnd.	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantity
→ SHAFT-RM	Raw Materials	75	-	-	-	LBS	75	-	75	

Shipment >

Transfer-from >

Transfer-to >

Summary Preview

Notes +  
(There is nothing to show in this view)

Transfer Order 1005

- Home
  - Prepare
  - Print/Send
  - Order
  - More options
- Post... | Create Whse. Shipment | Release | Create Whse. Receipt | Create Inventory Put-away/Pick...

**General** Show more

Transfer-from Code: MAIN | Direct Transfer:  | Posting Date: 11/19/2025

Transfer-to Code: VENDOR | In-Transit Code: | Status: Open

Lines | Manage | Functions | Line

New Line | Delete Line | Select items...

Item No.	Description	Quantity	Reserved Quantity Inbnd.	Reserved Quantity Shipped	Reserved Quantity Outbnd.	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive	Quantit
→ SHAFT-RM	Raw Materials	75	-	-	-	LBS	75	-	75	

Shipment >

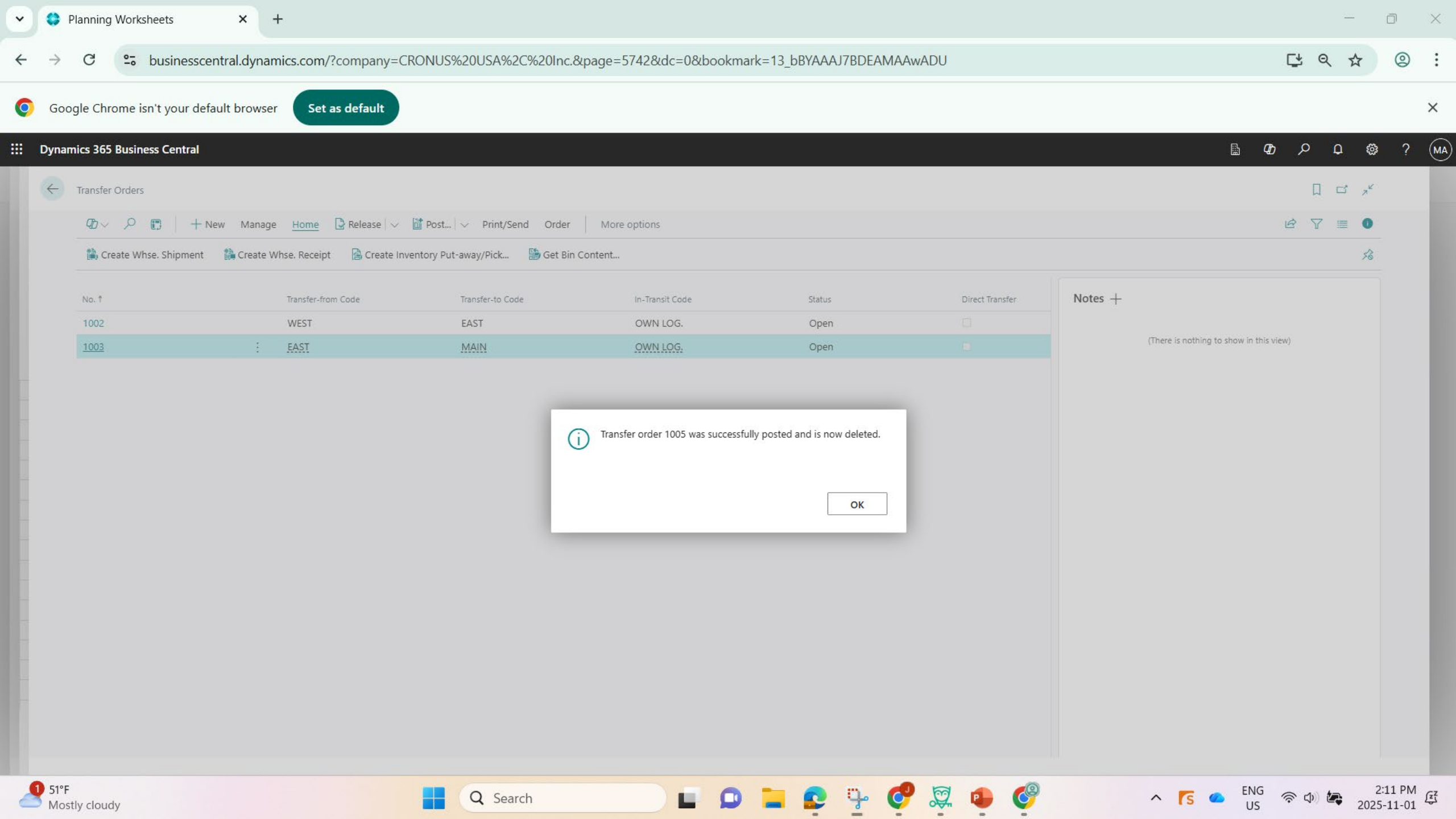
Transfer-from >

Transfer-to >

Summary Preview

Notes +

(There is nothing to show in this view)



Transfer Orders

+ New Manage Home Release Post... Print/Send Order More options

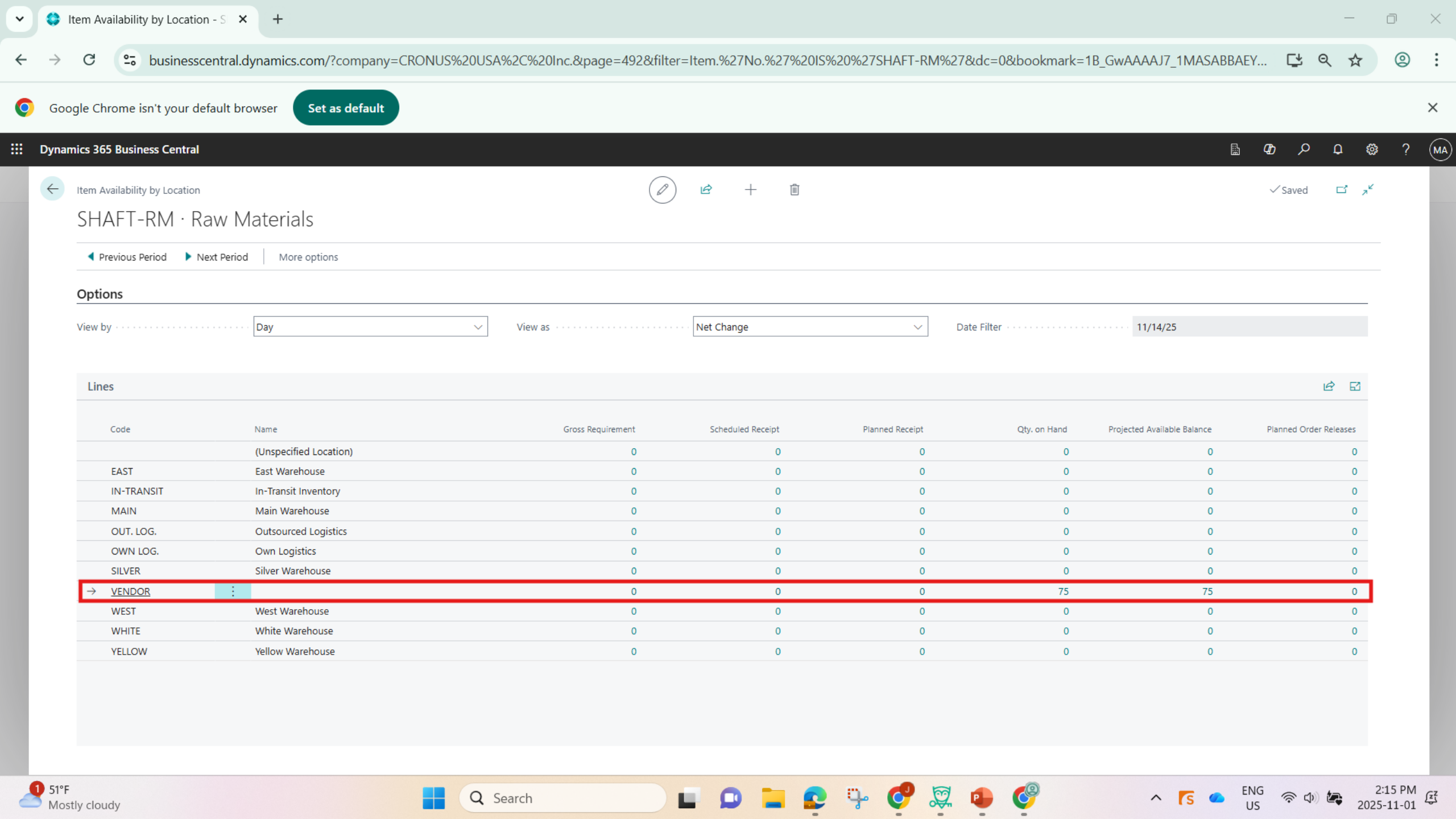
Create Whse. Shipment Create Whse. Receipt Create Inventory Put-away/Pick... Get Bin Content...

No. ↑	Transfer-from Code	Transfer-to Code	In-Transit Code	Status	Direct Transfer
1002	WEST	EAST	OWN LOG.	Open	<input type="checkbox"/>
1003	EAST	MAIN	OWN LOG.	Open	<input type="checkbox"/>

 Transfer order 1005 was successfully posted and is now deleted.

Notes +

(There is nothing to show in this view)



# SHAFT-RM · Raw Materials

◀ Previous Period ▶ Next Period | More options

## Options

View by: Day View as: Net Change Date Filter: 11/14/25

Lines		Gross Requirement	Scheduled Receipt	Planned Receipt	Qty. on Hand	Projected Available Balance	Planned Order Releases
	(Unspecified Location)	0	0	0	0	0	0
EAST	East Warehouse	0	0	0	0	0	0
IN-TRANSIT	In-Transit Inventory	0	0	0	0	0	0
MAIN	Main Warehouse	0	0	0	0	0	0
OUT. LOG.	Outsourced Logistics	0	0	0	0	0	0
OWN LOG.	Own Logistics	0	0	0	0	0	0
SILVER	Silver Warehouse	0	0	0	0	0	0
→	VENDOR	0	0	0	75	75	0
WEST	West Warehouse	0	0	0	0	0	0
WHITE	White Warehouse	0	0	0	0	0	0
YELLOW	Yellow Warehouse	0	0	0	0	0	0

## Business value

A complex industrial structure can include external vendors that handle specific tasks within the production process. Some companies outsource up to 75 percent of their production. Other significant cost savings or access to specialized skills and technologies that external vendors might not be available otherwise. A typical example is a company that handles design, quality control, and sales in-house but outsources all or large parts of the actual production.

## Feature details

The standard Dynamics 365 Business Central solution already meets many global needs. To meet local needs by adding capabilities that include:

- Logistic flows that manage subcontractor transfers for raw materials and component warehouse handling and item tracking.
- Flexible pricing that considers the work center, item, dates, and quantity.
- Finished good receipts with item tracking and warehouse handling from purchase orders.
- Logistic flow that manages subcontractor transfers of finished goods.
- Enhanced usability and more transparency in production processes.

► <https://learn.microsoft.com/en-us/dynamics365/release-plan/2025wave2/smb/dynamics365-business-central/use-subcontracting-capabilities-production-processes>



**Jenn Claridge**

Vice President of Operations | Microsoft MVP |  
Business Central...



▶ [www.jennclaridge.com](http://www.jennclaridge.com)

▶ <https://www.youtube.com/@BCentralwithJennClaridge>

# How to Impress your Boss with List Reporting in Business Central

Jo deRuiter



Planning Committee Member



Dynamics  
Advanced Credentialed  
Professional

# Jo deRuiter

Director of Business Applications

**Aisling Dynamics Business Solutions**

BC User Group Planning Committee Member



**AISLING DYNAMICS**   
BUSINESS SOLUTIONS

- Director of Business Applications – Aisling Dynamics Business Solutions
- 28 years experience as both end user and partner for Dynamics GP
- 7 years experience as both an end user and Partner for Dynamics BC
- 35 Years of a large variety of accounting systems
- Board of Advisors–School of Accountancy–Kennesaw State University, GA State University
- GP Advanced Credentials and BC Microsoft Certified
- Masters in Accounting and former CPA

Customer Ledger Entries: All Due Analysis 1

Due Date 1	Document...	Document No.	Customer No.	Customer Name 2	Sum(Remaining)	Sum(Original)	Sum(Remainin...	Sum(Max.	Payment...	Op...	On Hold	Ex	Pivot Mode
1	>	8/30/2024 (1)			-2.00	0.00	0.00	0.00					
2	>	6/08/2025 (1)			-2,722.50	0.00	0.00	0.00					
3	>	7/04/2025 (1)			-225.00	0.00	0.00	0.00					
4	>	10/30/2025 (1)			-81.29	0.00	0.00	0.00					
5	>	11/20/2025 (1)			-1,102.50	0.00	0.00	0.00					
6	>	12/2/2025 (1)			105.00	0.00	0.00	0.11					
7	>	12/29/2025 (1)			-322.50	0.00	0.00	0.00					
8	>	12/31/2025 (1)			286.00	0.00	0.00	0.29					
9	>	1/9/2026 (1)			-533.40	0.00	0.00	0.00					
10	>	1/21/2026 (1)			95.00	0.00	0.00	0.32					
11	>	1/23/2026 (2)			-4,071.00	0.00	0.00	0.00					
12	>	2/2/2026 (1)			-505.44	0.00	0.00	-0.51					
13	>	2/4/2026 (12)			7,479.90	0.00	0.00	7.10					
14	>	2/11/2026 (6)			12,083.75	0.00	0.00	3.80					
15	>	2/15/2026 (2)			3,630.00	0.00	0.00	1.63					
16	>	2/18/2026 (6)			13,567.50	0.00	0.00	3.39					
17	>	2/19/2026 (1)			350.00	0.00	0.00	0.35					
18	>	2/25/2026 (7)			6,982.50	0.00	0.00	2.80					
19	>	3/4/2026 (20)			17,031.84	0.00	0.00	10.71					
20	>	3/5/2026 (1)			90.00	0.00	0.00	0.09					
21	>	3/19/2026 (2)			440.00	0.00	0.00	0.44					
22	Total				52,595.86	0.00	0.00	30.52					

Views: All, All Due, Due Now. Filter list by: Remaining Amount <+0. Filter totals by...

Row Groups: Due Date. Values: Sum(Original A...), Sum(Debit Amo...), Sum(Debit Amo...), Sum(Credit Am...), Sum(Credit Am...), Sum(Remainin...).

Row: 70 Total Rows: 70

## What a list page is:

- Any page showing multiple records (e.g., Customers, Vendor Ledger Entries, Item Ledger Entries).
- These pages support filters, search, and Analysis Mode basics.

## Filter Tricks

Shortcut / Syntax	What It Does	Where to Use	Example	When It's Most Useful
@	Case-insensitive search	Text fields in filters	@smith	When capitalization varies (names, items, vendors)
*	Wildcard for any characters	Text fields	*consult*	Contains search (like SQL LIKE %text%)
?	Single-character wildcard	Text fields	J?n	Match variations like Jon/Jen/Jin
..	Range between values	Numbers, dates, text	1000..2000	Pull a span of records
`	`	OR condition	Most fields	`NY
<>	Not equal to	All filterable fields	<>Closed	Exclude specific value
>, <, >=, <=	Comparison operators	Numeric/date fields	>5000	Threshold filtering
&	AND condition	Same field	>100&<500	Narrow numeric/date ranges
" (blank)	Filter for empty values	Any field	"	Find missing data
<>"	Not blank	Any field	<>"	Find populated records
=	Exact match	Text/Code fields	#NAME?	Prevent wildcard behavior
	AND condition	Same field	- 950.00 950.00	When looking for two or more values that are not in a row, this example searches for both the credit and debit amount in a field

## Cool Date Filter Tricks

Syntax	Meaning	Example	Why It's Powerful
T	Today	T	Instant current date
Y	Current year	Y	Full fiscal calendar year
M	Current month	M	Month-to-date views
W	Current week	W	Weekly dashboards
CM	Current month	CM	Alternative syntax
CW	Current week	CW	ISO week logic
CY	Current year	CY	Often used in finance
FY	Fiscal year	FY	Company accounting year
-1Y	Last year	-1Y	YoY comparisons
-1M	Last month	-1M	Period comparisons
T-30D	Last 30 days	T-30D..T	Rolling windows
P	Accounting period	P	Period-based reporting

## 2) FILTER PANE — COMPLETE SYNTAX CHEAT SHEET

### Opening and Managing Filters

Action	Shortcut
Open/Close filter pane	Shift+F3
Filter to selected value	Alt+F3
Add selected column to filters	Shift+Alt+F3
Reset all filters	Ctrl+Shift+Alt+F3

### Range Filters

Goal	Example
Between values	1000.2000
Up to a value	..5000
From a value	1000..
Date range	01/01/2025..01/31/2025
Fiscal period	P1..P3

## WILDCARDS FOR TEXT FIELDS

Symbol	Meaning	Example
*	Any number of characters	*Service
?	Exactly one character	Sm?th

Examples:

Co\* finds values starting with "Co"

\*Inc finds values ending with "Inc"

Health finds values with Health

## CASE INSENSITIVITY

Goal	Syntax
Ignore Case	Prefix with "@"

Examples:

@man\* matches MAN, Man, man

@corp

## SPECIAL CHARACTERS IN FILTER VALUES

**Special Characters in Filter Values** - If the value contains any of the following characters:

& | ( ) = <

Wrap the value in single quotes, for example:

'J & J Supplies'

## 7) HIGH-VALUE FILTER EXAMPLES

Scenario	Filter
Open Accounts Receivable	Remaining Amount <>0
Overdue Transactions	Due Date < Today
Current Month	Posting Date = CM
Previous Month	Posting Date = -CM
Year to Date	Posting Date = FY..Today
Zero Inventory	Quantity = 0

## 8) COMMON PITFALLS AND BEST PRACTICES

### Common Mistakes

- Using Search instead of Filters
- Forgetting to exclude zero balances
- Not using case-insensitive matching when needed
- Exporting before filtering

### Best Practices

- Apply filters **before** entering Analysis Mode
- Save views for repeatability
- Teach shortcuts early
- Use multiple analysis table instead of rebuilding pivots
- Export from Analysis Mode instead of raw lists

### 3) SEARCH BOX ADVANCED BEHAVIOR (REFERENCE)

These behaviors are still useful for training and troubleshooting.

Goal	Syntax
Exact match (case-sensitive)	'Man'
Starts with	Man*
Ends with	*man
Case-insensitive	@man*

**Important Note - Search behavior can vary by page and version. Filters always behave consistently**

### 4) SAVED VIEWS = MINI REUSABLE REPORTS

What Views save:

- Filters
- Sort Order
- Column Layout
- Freeze Panes

What Views does **NOT** save:

- Analysis Mode Layouts
- Pivot Destinations

## Turn any List Into a Mini-Report in Seconds, Answer the Bosses Detailed Questions Quickly!

Stop running reports for quick answers, user Lists+Filters+Analysis, and Pivot Modes.

Let's look at a list in Business Central

Q. What is the total owed by due date for each customer for cash flow planning, (a quick question by the boss)?

A. Go to **Customer Ledger Entries** and let's look at how to find that quickly.

Flip into **Analysis Mode** and show instant totals/pivot. Export to Excel if needed.

## Filter pane mastery (where the "magic" actually happens)

Open **Filter Pane** quickly

Shift+F3 opens/closes Filter Pane

Alt+F3 filters to the selected value (toggles on/off)

Shift+Alt+F3 adds the selected column as a filter field

Crtl+Shift+Alt+F3 resets filters

**Views = reusable "mini-reports"**

Due Date ↓	Sum(Original	Sum(Debit Amount)	Sum(Debit Amou...	Sum(Credit	Sum(Credit Amou...	Sum(Remaining
8/30/2024 (1)	-2,140.00	0.00	0.00	0.00	0.00	-2.00
6/26/2025 (1)	-17,010.00	0.00	0.00	0.00	0.00	-2,722.50
7/24/2025 (1)	-907.50	0.00	0.00	0.00	0.00	-225.00
10/30/2025 (1)	-350.00	0.00	0.00	0.00	0.00	-61.29
11/20/2025 (1)	-16,307.46	0.00	0.00	0.00	0.00	-1,102.50
12/3/2025 (1)	105.00	0.00	0.00	0.00	0.00	105.00
12/29/2025 (1)	-1,015.00	0.00	0.00	0.00	0.00	-322.50
12/31/2025 (1)	286.00	0.00	0.00	0.00	0.00	286.00
1/9/2026 (1)	-15,225.00	0.00	0.00	0.00	0.00	-533.40
1/21/2026 (1)	315.00	0.00	0.00	0.00	0.00	95.00
1/23/2026 (2)	-4,071.00	0.00	0.00	0.00	0.00	-4,071.00
2/2/2026 (1)	-505.44	0.00	0.00	0.00	0.00	-505.44
2/4/2026 (12)		0.00	0.00	0.00	0.00	7,479.90
2/11/2026 (6)		0.00	0.00	0.00	0.00	12,083.75
2/15/2026 (2)		0.00	0.00	0.00	0.00	3,630.00
2/18/2026 (6)	13,567.50	0.00	0.00	0.00	0.00	13,567.50
2/19/2026 (1)	350.00	0.00	0.00	0.00	0.00	350.00
2/25/2026 (7)	6,982.50	0.00	0.00	0.00	0.00	6,982.50
3/4/2026 (20)	17,031.84	0.00	0.00	0.00	0.00	17,031.84
3/5/2026 (1)	90.00	0.00	0.00	0.00	0.00	90.00
3/19/2026 (2)	440.00	0.00	0.00	0.00	0.00	440.00
Total	5,214.69	0.00	0.00	0.00	0.00	52,595.86

What are we due in the coming weeks to plan for cash?

I can actually see by date

## Wildcard searching & "power filters" you can show on one slide

Use these in **Filters** (filter pane / request pages):

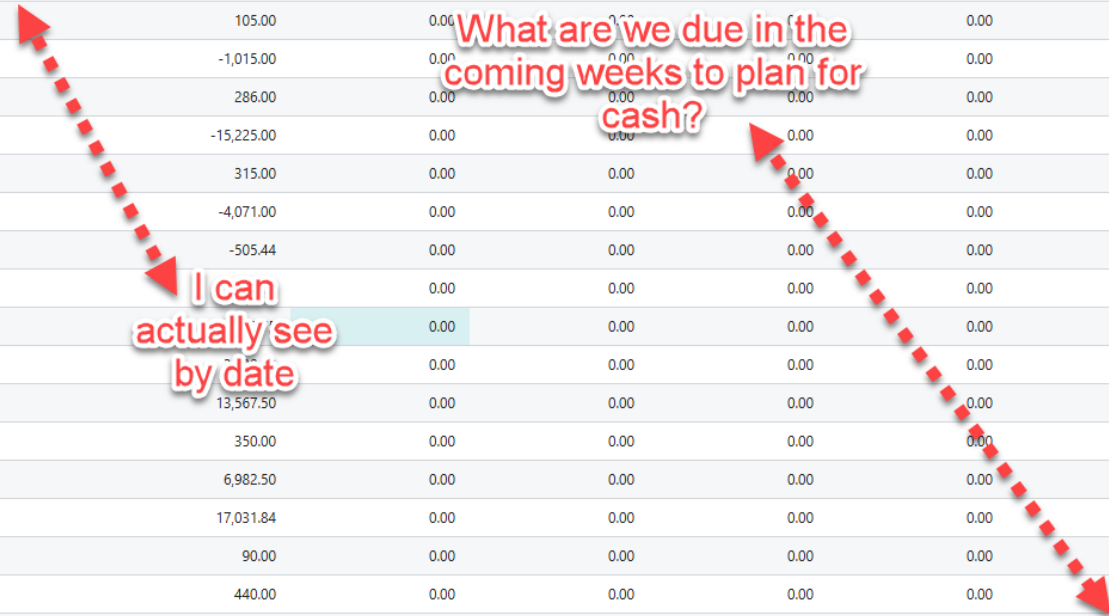
- **Ranges:** to use a range, think dot, dot. An example of searching for accounts 1100 to 2100 looks like this: **1100..2100**  
The same 'dot-dot' can be used for "Up to" and amount of numbers, so, if I wanted to see all transactions from the beginning of time up until 12/31/2024, the search would be: **..12/31/2024**
- **Either/or:** to find either/or, or use an And, you can use the Pipe just above your Enter key, "|", to search GL accounts. For GL accounts 1200 and 1900, I would use this: **1200|1900**
- **Not Equal:** uses greater than and less than signs in this configuration "<>", so <0> (classic for "Remaining Amount <0>")
- **And:** >200&<1200
- **Wildcards:**
  - \* = Use this to search for many unknown characters before or after a string of letters or numbers.
  - ? = Use the question mark to find one unknown character

## Boss-level search tricks (the search box ≠ filter pane)

If you're using legacy search behaviors, you can "tune" search text like this:

- Exact match (case-sensitive): 'Man'
- Starts with (case-sensitive): Man\*
- Case-insensitive starts with: @Man\* ( as you can see, preface with the @ to indicate you need a case-insensitive search
- Ends with (case-sensitive): \*man

Due Date ↓	Sum(Original	Sum(Debit Amount)	Sum(Debit Amou...	Sum(Credit	Sum(Credit Amou...	Sum(Remaining
8/30/2024 (1)	-2,140.00	0.00	0.00	0.00	0.00	-2.00
6/26/2025 (1)	-17,010.00	0.00	0.00	0.00	0.00	-2,722.50
7/24/2025 (1)	-907.50	0.00	0.00	0.00	0.00	-225.00
10/30/2025 (1)	-350.00	0.00	0.00	0.00	0.00	-61.29
11/20/2025 (1)	-16,307.46	0.00	0.00	0.00	0.00	-1,102.50
12/3/2025 (1)	105.00	0.00	0.00	0.00	0.00	105.00
12/29/2025 (1)	-1,015.00	0.00	0.00	0.00	0.00	-322.50
12/31/2025 (1)	286.00	0.00	0.00	0.00	0.00	286.00
1/9/2026 (1)	-15,225.00	0.00	0.00	0.00	0.00	-533.40
1/21/2026 (1)	315.00	0.00	0.00	0.00	0.00	95.00
1/23/2026 (2)	-4,071.00	0.00	0.00	0.00	0.00	-4,071.00
2/2/2026 (1)	-505.44	0.00	0.00	0.00	0.00	-505.44
2/4/2026 (12)		0.00	0.00	0.00	0.00	7,479.90
2/11/2026 (6)		0.00	0.00	0.00	0.00	12,083.75
2/15/2026 (2)		0.00	0.00	0.00	0.00	3,630.00
2/18/2026 (6)	13,567.50	0.00	0.00	0.00	0.00	13,567.50
2/19/2026 (1)	350.00	0.00	0.00	0.00	0.00	350.00
2/25/2026 (7)	6,982.50	0.00	0.00	0.00	0.00	6,982.50
3/4/2026 (20)	17,031.84	0.00	0.00	0.00	0.00	17,031.84
3/5/2026 (1)	90.00	0.00	0.00	0.00	0.00	90.00
3/19/2026 (2)	440.00	0.00	0.00	0.00	0.00	440.00
Total	5,214.69	0.00	0.00	0.00	0.00	52,595.86



## Analysis Mode (your “pivot tables inside BC” moment)

- **Summary Bar:** Instantly shows Sum/Avg/Count/Min/Max as you Select rows/cells
- **Pivot Mode:** Drag fields into **Row groups / Column labels / Values** to build a pivot-table-style view
- **Multiple Analysis tabs:** Create different “report angles” (rename/duplicate) and they persist for you
- **Export to Excel from Analysis:** Right-click in data area to export
- **Newer Power Move (mention if relevant):** Add fields from related tables in analysis mode (permission + version dependent)

## Excel Workflows: “Export” vs “Edit in Excel” (and when to use each)

- **Export to Excel**  
Great for quick ad hoc sharing or pivoting in Excel  
(In analysis mode, you can export from the data area)
- **Edit in Excel (publish back)**  
Best for mass updates with controls/permissions  
Open a list in Excel, change data, publish back  
Admins can control access via permission sets like;  
EDIT IN EXCEL - VIEW, EDIT IN EXCEL-ADMIN, EXCEL EXPORT ACTION

Due Date ↓	Sum(Remaining)
8/30/2024 (1)	-2.00
6/26/2025 (1)	-2,722.50
7/24/2025 (1)	-225.00
10/30/2025 (1)	-61.29
11/20/2025 (1)	-1,102.50
12/3/2025 (1)	105.00
12/29/2025 (1)	-322.50
12/31/2025 (1)	286.00
1/9/2026 (1)	-533.40
1/21/2026 (1)	95.00
1/23/2026 (2)	-4,071.00
2/2/2026 (1)	-505.44
2/4/2026 (12)	7,479.90
2/11/2026 (6)	12,083.75
2/15/2026 (2)	3,630.00
<b>Total</b>	<b>14,134.02</b>

## Ready-to-steal “impress the boss” scenarios

- **AP: “What do we owe by due month?”**
  - Vendor Ledger Entries → Remaining Amount  $\lt \gt 0+$   
Due Date range → Analysis mode pivot by Vendor / Due Date Month
- **AR: “What’s overdue and by how much?”**
  - Customer Ledger Entries → filter overdue + pivot by Customer + Due Date Month (Microsoft Learn even outlines a similar example flow)
- **Inventory: “Which items are tying up cash?”**
  - Item list/ledger entries → pivot by posting group/location and sum quantities/amounts (show pin/freeze/pivot)

# Dynamics Business Central – Search, Filter, and Export

## MASTER CHEAT SHEET

### Search vs Filter (Critical Distinction)

- Global / List Search box
- Used for Quick Narrowing
- Not precise
- Depends on search indexing
- Often searches multiple fields at once

Best for:

- Finding a customer or vendor quickly
- Narrowing a list before applying filters

Important rule for learners –

*Search is helpful for navigation, **NOT** for reporting*

## 1) Filters (Filter Pane) – The Real Reporting Tool

- Exact and deterministic
- Field-specific
- Supports operators, ranges, logic, and wildcards
- Saved with views
- Used directly by Analysis Mode

Training rule to emphasize

*Search helps you find records. Filters define your dataset.*

## ANALYSIS MODE – FILTERING PLUS PIVOTING

### What Changes in Analysis Mode

- Existing filters remain active
- You can now define:
  - Row Groups
  - Column Groups (Pivot Mode)
  - Values (Sum, Count, Average, Min, Max)

### Summary Bar Calculations

When selecting rows or cells, Business Central automatically calculates:

- Sum
- Average
- Count
- Minimum
- Maximum
- No Setup is required

### Multiple Analysis Tabs

- Create multiple tabs per list
- Rename table
- Duplicate tabs
- Compare scenarios side-by-side
- Example tab usage:
  - Open AR by Customer
  - AR by Month
  - Overdue only

## EXPORTING – ALL OPTIONS EXPLAINED

### Exporting to Excel (Static)

- From the List Page actions
- From Analysis Mode (right-click)
  - Snapshot of filtered data
  - No write-back to Business Central
  - Safe for sharing
- Best used for:
  - Emailing data
  - Offline analysis
  - Audit documentation

### Exporting to Excel (Live Connection)

- Opens Excel with the Business Central add-in
  - Allows changes to be published back to Business Central
- Best used for:
- Mass updates
  - Controlled data maintenance

#### **Important cautions:**

- Permissions are required
- Not ideal for reporting-only scenarios

### Analysis Mode Export (Recommended for Reporting)

- Preserves grouping
- Preserves pivot layout
- Preserves aggregations
- This is the closest equivalent to built-in reporting in Business Central

**THANK YOU**