



Technical release notes – Presales plan new

Update: July 2022



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1 Introduction

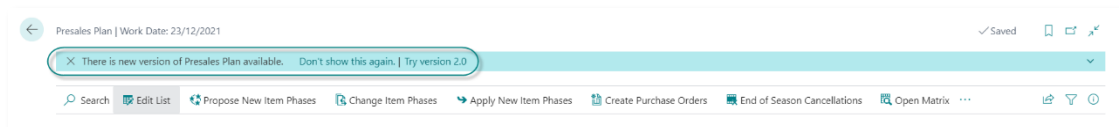
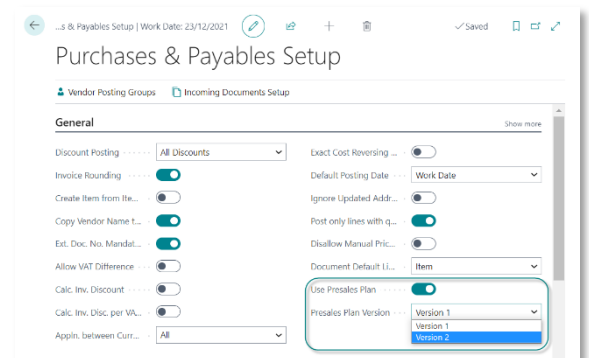
In this release a new version of the Presales plan has been released. The reason for creating a new Presales plan is that we have improved the performance when using large number of items. The current Presales plan is based on a temporary table and this has been changed, the Presales plan version 2 is based on a normal table. This means that the information is stored and can be manually updated. Because of this change the Presales plan version 2 works a little different but is still supporting the same business processes.

- Presales plan version 1 > current Presales plan
- Presales plan version 2 > new Presales plan

In this release the team decided to leave the current Presales plan version 1 in the solution and we made the new Presales plan version 2 beside the current Presales plan version 1 available. The next release we will discountinue the current Presales plan version 1.

In the Purchase & Receivable Setup it is possible to activate the use of the Presales plan and the version of the Presales plan can be selected.

When opening the current Presales plan, there will be a notification which tells the user that a new version of the Presales plan is available.



2 Job Queue Season Setup

Example Season 2022S

Report 11006842

Go to Job Queue Entries and create the following set up.

The Job below has been set as a recurring job, running every 60 minutes. The job calculates the Inventory, Sales Order Quantities, Purchase Order Quantities and Sales Order Outstanding Amount (LCY) of Items in the season.

Job Queue Entry Card | Work Date: 23/12/2021

Report · 11006482 · Update Presales Calc. Values

Process Reports Actions Related Fewer options

Report Request Page

General

Object Type to Run: Report
 Object ID to Run: 11006482
 Object Caption to Run: Update Presales Calc. Values
 Description: Update Presales Calc. Values
 Parameter String: Season 2022SS
 Job Queue Category Code:
 User ID: ALY

Maximum No. of Attempts to Run: 0
 Rerun Delay (sec): 0
 Last Ready State: 20/07/2022 14:58
 Earliest Start Date/Time:
 Expiration Date/Time:
 Job Timeout: 12 hours
 Status: On Hold

Report Parameters

Report Request Page Options: ☒
 Report Output Type: None (Processing only)
 Printer Name:

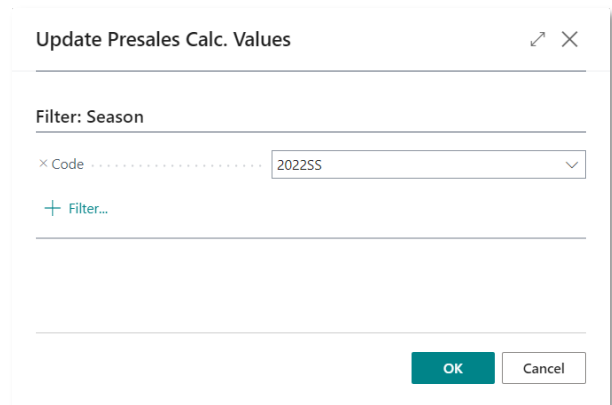
Recurrence

Recurring Job: ☒
 Run on Mondays: ☒
 Run on Tuesdays: ☒
 Run on Wednesdays: ☒
 Run on Thursdays: ☒
 Run on Fridays: ☒
 Run on Saturdays: ☒
 Run on Sundays: ☒

Next Run Date Formula:
 Starting Time:
 Ending Time:
 No. of Minutes between Runs: 60
 Inactivity Timeout Period: 5

Report -> Report Request Page

This allows to select the season the user wants to set up. Report Filter set on season 2022SS. The can also be an other season.



Update Presales Calc. Values

Filter: Season

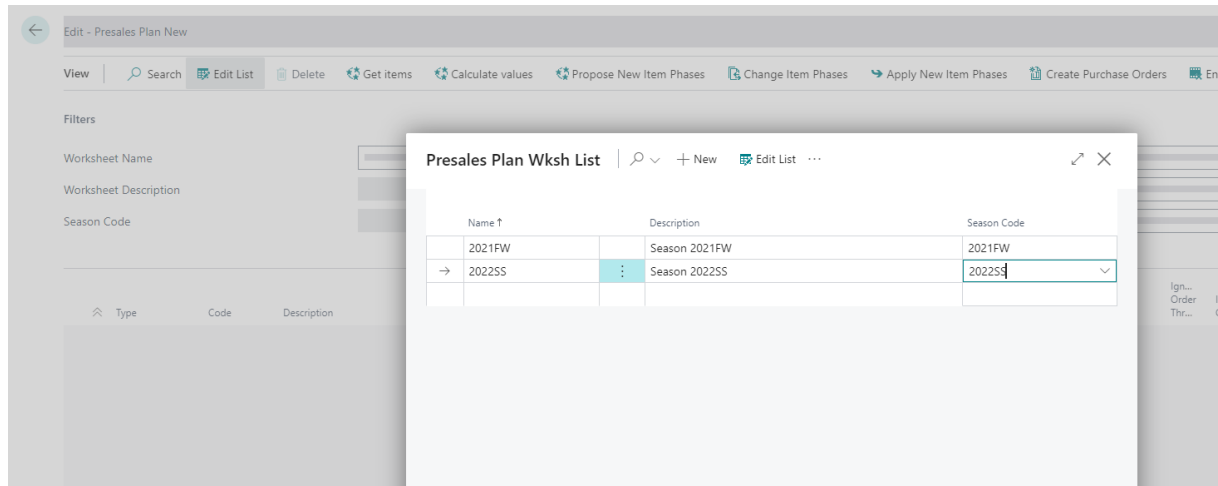
× Code 2022SS

+ Filter...

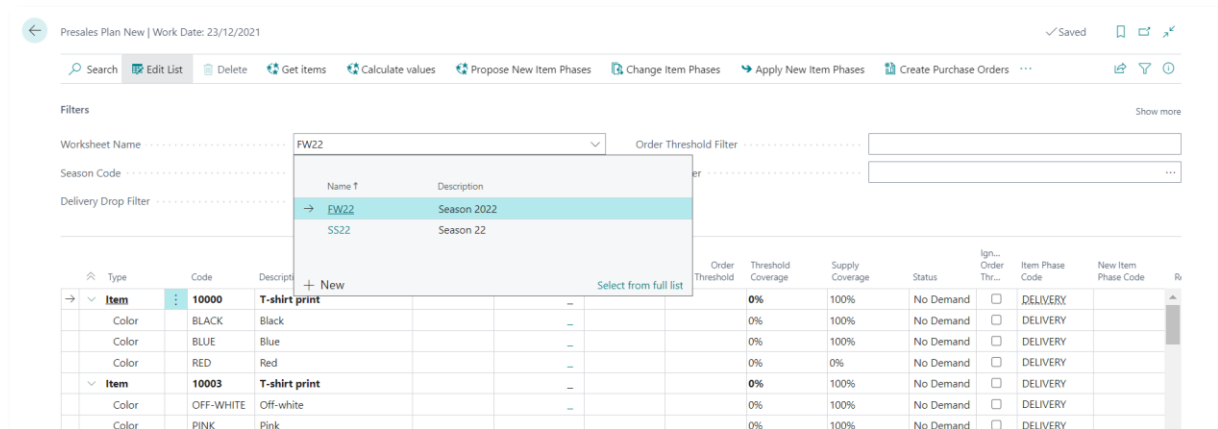
OK Cancel

3 How does it work in Presales Plan

The Presales plan wksh list should be created per job queue.



Than the Worksheet Name can be selected.



Get Items, populates the worksheet with items from the season on the worksheet.



- Calculate values: creates a manual run of the job queue scheduled job to update the calculated values.
- Get Items: after the job queue has updated all the values the button 'Get items' must be pressed which will updates all the value in the Presales plan new.

The following status fields are available to give additional insights in the lines in the Presales plan new.

- "Threshold Not Met" – Order Threshold has not been met.
- "Blocked for Purchase" – Item's, Item Phase is blocked for purchase.
- "Inventory Coverage" – Demand has been covered by Inventory.
- "Ready to Purchase" – Demand is ready for Purchase Order.
- "No Demand" – There is no outstanding demand.
- "Complete" – Worksheet has been completed.