

# Sage 50 Manufacturing



## Setting the Planning & Works order Defaults.

***This Document has been created to show sage users how to setup the Planning & Works order defaults for Sage Manufacturing.***

Firstly Sign onto Sage Manufacturing as Manager and navigate to the settings tab on the top bar and select 'Planning Defaults'

### GENERAL TAB

How many Days per Week your Business operates

Enter the number of days you want to act as a buffer for lead times in the 'Safety Planning Time' box.

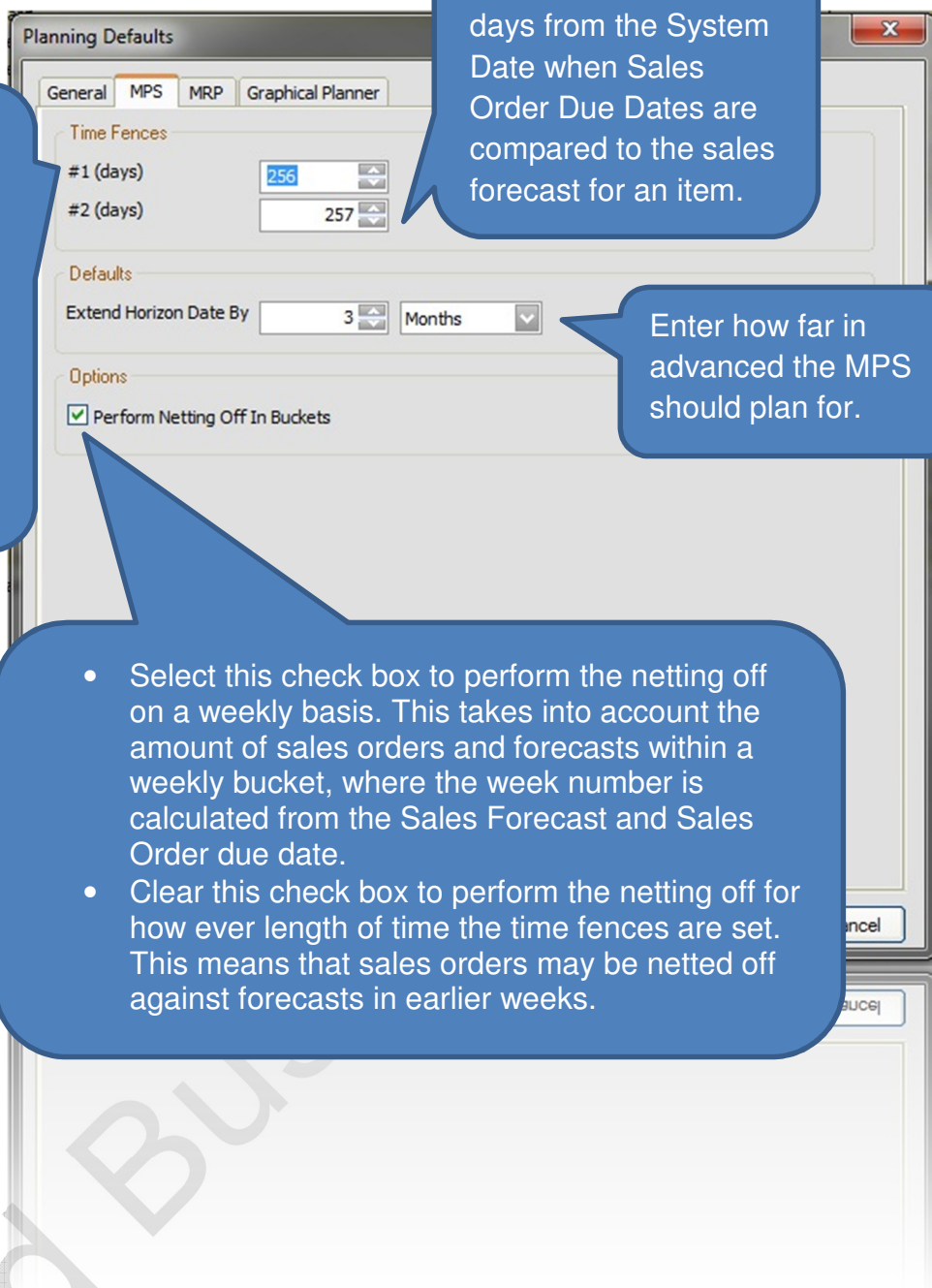
Set the tags to automatically appear in 'Expanded' or 'Collapsed' mode.

How many hours your business is Operational

This acts as a default for the setting that is displayed in the 'Make to Stock Details' window.

- Select 'Ignore Stock and Inventory Policy' to ignore any physical stock or inventory policy associated with the stock item.
- Clear 'Ignore Stock and Inventory Policy' to take into consideration the physical stock and inventory policy associated with the stock item.

The screenshot shows the 'Planning Defaults' window with the 'General' tab selected. The window has a title bar with a close button (X). Inside, there are four tabs: 'General', 'MPS', 'MRP', and 'Graphical Planner'. The 'General' tab is active. It contains several sections: 'Days Per Week' with radio buttons for 'Five' (selected), 'Six', and 'Seven'; 'Date Calculations' with 'Top Level Safety Planning Time (days)' set to 0 and 'Working Hours Per Day' set to 7 hrs and 30 mins; 'Default tags view to' with radio buttons for 'Expanded' (selected) and 'Collapsed'; and 'Make to Stock Records' with a checkbox for 'Ignore Stock and Inventory Policy' which is currently unchecked. At the bottom right are 'OK' and 'Cancel' buttons. A large, semi-transparent 'Red Business Systems' watermark is visible across the background of the window.

A screenshot of the "Planning Defaults" dialog box in a software application. The dialog has four tabs: "General", "MPS", "MRP", and "Graphical Planner". The "MPS" tab is selected. It contains three sections: "Time Fences", "Defaults", and "Options".  
- "Time Fences": Has two input fields. "#1 (days)" is set to 256 and "#2 (days)" is set to 257.  
- "Defaults": Has a label "Extend Horizon Date By" followed by a numeric input field set to 3 and a dropdown menu set to "Months".  
- "Options": Has a checked checkbox labeled "Perform Netting Off In Buckets".  
The dialog box has a close button (X) in the top right corner and "Cancel" and "OK" buttons at the bottom right.

Select the number of days from the System Date when Sales Order Due Dates are compared to the sales forecast for an item.

Select the number of days from the System Date when any sales forecasts are ignored in the Master Production Schedule.

Enter how far in advanced the MPS should plan for.

- Select this check box to perform the netting off on a weekly basis. This takes into account the amount of sales orders and forecasts within a weekly bucket, where the week number is calculated from the Sales Forecast and Sales Order due date.
- Clear this check box to perform the netting off for how ever length of time the time fences are set. This means that sales orders may be netted off against forecasts in earlier weeks.

Select whether you have permission to cancel works orders or purchase orders for the product.

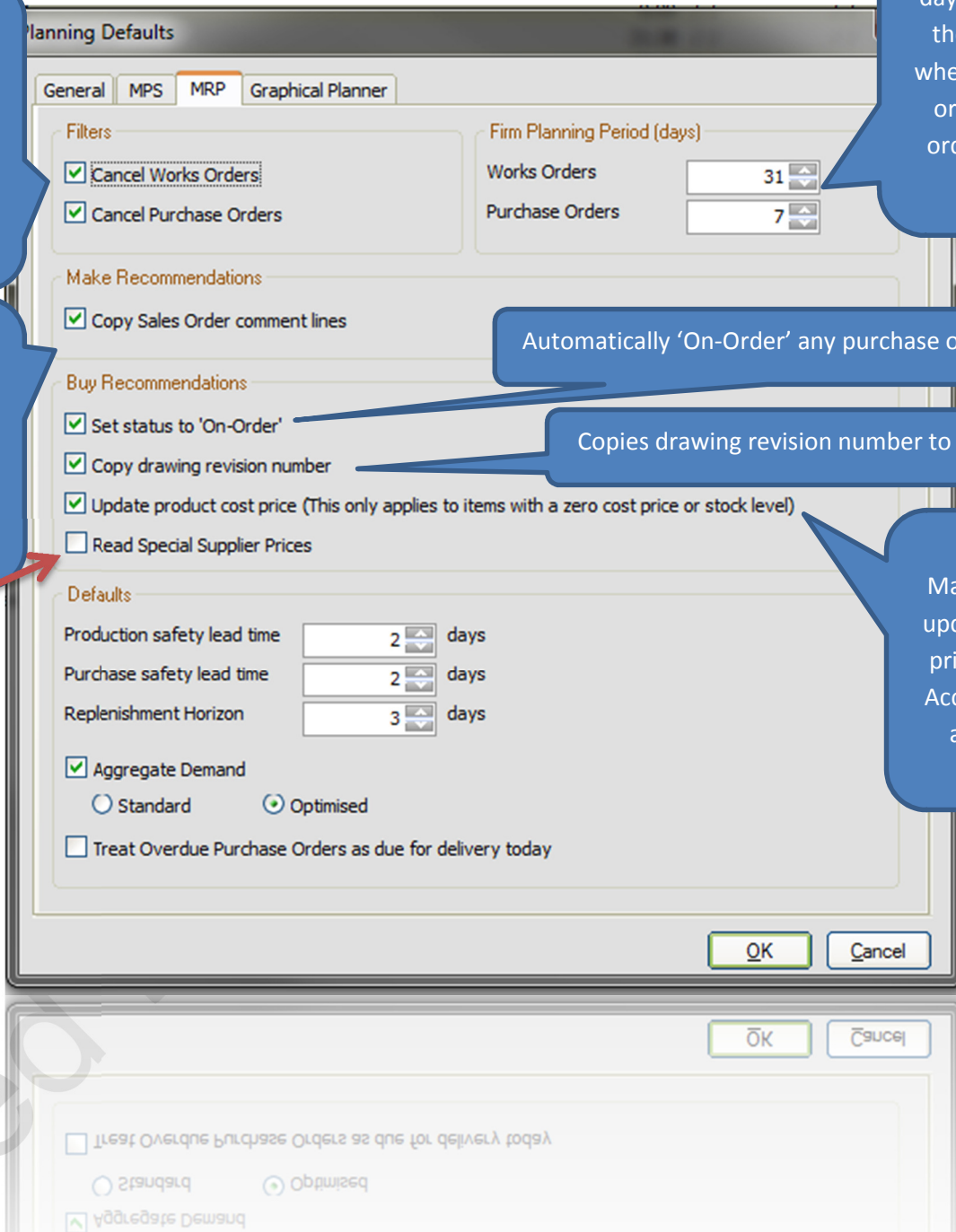
Allows Comment lines 1 & 2 from accounts to be put into manufacturing.

Set the number of days in advance of the system date when any purchase orders or works orders cannot be cancelled.

Automatically 'On-Order' any purchase order generated

Copies drawing revision number to Purchase order.

This lets Manufacturing update the cost price stored in Accounts when an order is raised.



The screenshot shows the 'Planning Defaults' window with the 'MRP' tab selected. The window is divided into several sections:

- Filters:**
  - ☒ Cancel Works Orders
  - ☒ Cancel Purchase Orders
- Firm Planning Period (days):**
  - Works Orders: 31
  - Purchase Orders: 7
- Make Recommendations:**
  - ☒ Copy Sales Order comment lines
- Buy Recommendations:**
  - ☒ Set status to 'On-Order'
  - ☒ Copy drawing revision number
  - ☒ Update product cost price (This only applies to items with a zero cost price or stock level)
  - ☐ Read Special Supplier Prices
- Defaults:**
  - Production safety lead time: 2 days
  - Purchase safety lead time: 2 days
  - Replenishment Horizon: 3 days
  - ☒ Aggregate Demand
    - ☐ Standard
    - ☒ Optimised
  - ☐ Treat Overdue Purchase Orders as due for delivery today

Callouts provide additional context for these settings:

- 'Cancel Works Orders' and 'Cancel Purchase Orders' allow users to select whether they have permission to cancel orders for the product.
- 'Firm Planning Period' settings (31 days for Works Orders, 7 days for Purchase Orders) set the number of days in advance of the system date when any purchase orders or works orders cannot be cancelled.
- 'Copy Sales Order comment lines' allows comment lines 1 & 2 from accounts to be put into manufacturing.
- 'Set status to 'On-Order'' automatically 'On-Order' any purchase order generated.
- 'Copy drawing revision number' copies drawing revision number to Purchase order.
- 'Update product cost price' lets Manufacturing update the cost price stored in Accounts when an order is raised.
- 'Read Special Supplier Prices' is an important setting discussed in the note below.

**Important!** Special supplier prices can only be applied if there are no cost prices held for the suppliers in the Product Information module and the supplier list there is not updated automatically. If you want MRP to read special supplier prices from Accounts, ensure that the Cost Price for the Suppliers is zero and the 'Automatically maintain supplier list when purchase orders are raised' check box is cleared on the Supplier tab in the Product Information record.

- Select this check box to apply the special price for a supplier and product combination from Accounts.
- Clear the check box to apply the last purchase price for the recommendation.

**Note:** If you select 'Read Special Supplier Prices' and no special price exists in Accounts, the system uses the last purchase price instead.