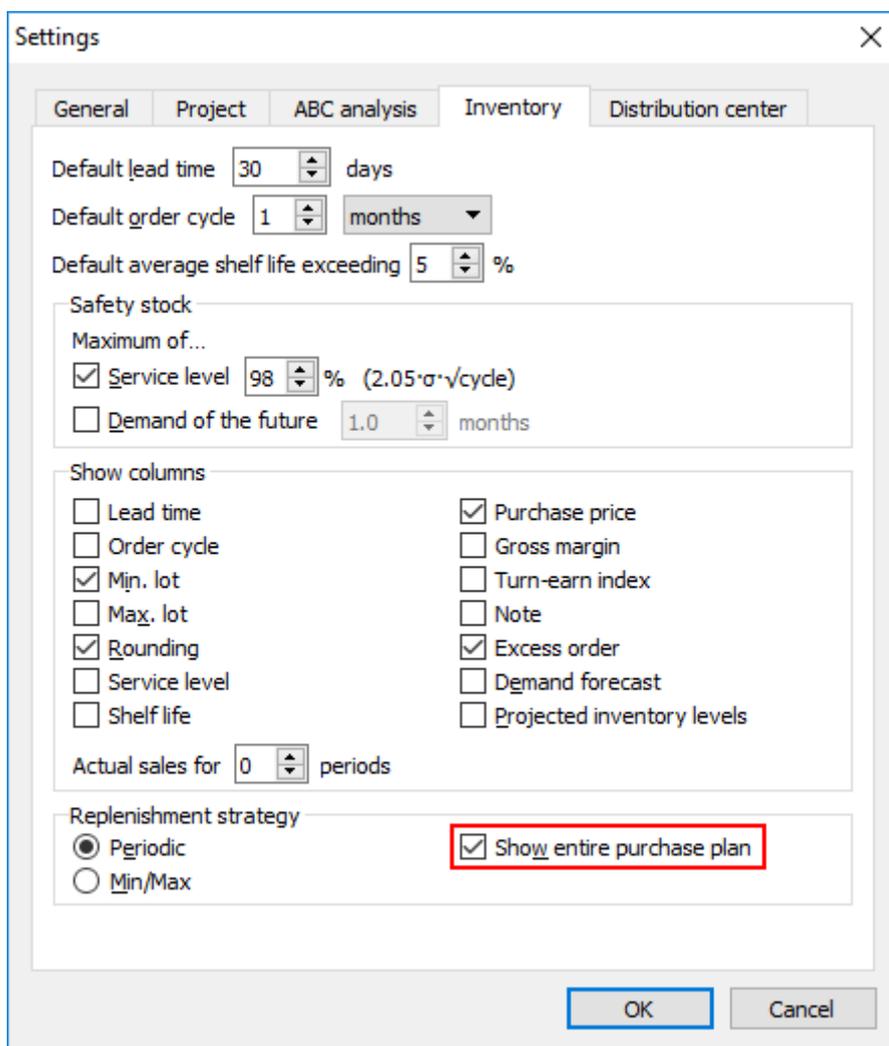


6.6. Exporting Purchase Plan

To plan supply (or manufacturing), your supplier needs to know a strategic plan containing the orders you intend to send him in the future. Streamline automatically calculates such the plan based on the forecasts and replenishment parameters. This plan can be easily exported to Excel.

Streamline shows the plan in the **Purchase plan** section of the inventory report. By default, this section is hidden. To display it:

1. Go to the **Inventory planning** tab.
2. Click the **Settings** button.
3. Check the **Show entire purchase plan** option (see figures below).



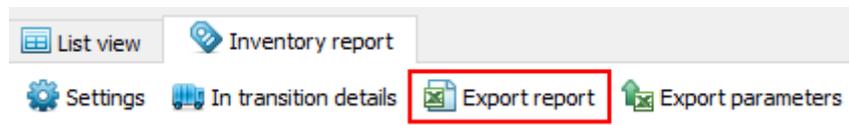
The screenshot shows the 'Settings' dialog box with the 'Inventory' tab selected. The 'Show entire purchase plan' checkbox is checked and highlighted with a red box. Other settings include: Default lead time: 30 days; Default order cycle: 1 months; Default average shelf life exceeding: 5 %; Safety stock: Maximum of... Service level: 98 % (2.05·σ·√cycle); Demand of the future: 1.0 months; Show columns: Lead time, Order cycle, Min. lot, Max. lot, Rounding, Service level, Shelf life, Purchase price, Gross margin, Turn-earn index, Note, Excess order, Demand forecast, Projected inventory levels; Actual sales for: 0 periods; Replenishment strategy: Periodic.

Category	Setting	Value
General	Default lead time	30 days
General	Default order cycle	1 months
General	Default average shelf life exceeding	5 %
Safety stock	Maximum of...	
Safety stock	Service level	98 % (2.05·σ·√cycle)
Safety stock	Demand of the future	1.0 months
Show columns	Lead time	<input type="checkbox"/>
Show columns	Order cycle	<input type="checkbox"/>
Show columns	Min. lot	<input checked="" type="checkbox"/>
Show columns	Max. lot	<input type="checkbox"/>
Show columns	Rounding	<input checked="" type="checkbox"/>
Show columns	Service level	<input type="checkbox"/>
Show columns	Shelf life	<input type="checkbox"/>
Show columns	Purchase price	<input checked="" type="checkbox"/>
Show columns	Gross margin	<input type="checkbox"/>
Show columns	Turn-earn index	<input type="checkbox"/>
Show columns	Note	<input type="checkbox"/>
Show columns	Excess order	<input checked="" type="checkbox"/>
Show columns	Demand forecast	<input type="checkbox"/>
Show columns	Projected inventory levels	<input type="checkbox"/>
Actual sales for	Actual sales for	0 periods
Replenishment strategy	Replenishment strategy	Periodic
Replenishment strategy	Show entire purchase plan	<input checked="" type="checkbox"/>

Item code	Model type	On hand	Days of supply	Pending sales orders	In transition	Lead time, days	Order cycle, months	Safety stock	Order now			Purchase plan				
									Qty	Value	Days of supply	Jan 2016	Feb 2016	Mar 2016	Apr 2016	May 2016
C1020	Seasonal ...	120	57	10	0	30	1	3	20	1000.00	10	20	75	71	81	82
F1020	Seasonal ...	208	213	0	0	30	1	3	0	0.00		0	0	0	0	0
H1010	Seasonal ...	15	18	0	10	30	1	1	13	46.28	33	13	12	11	14	15
H1020	Seasonal ...	30	4	0	0	30	1	11	250	1957.50	35	250	250	250	350	300
H2010	Seasonal ...	35	4	0	50	90	1	13	350	3689.00	33	350	400	350		
H2020	Seasonal ...	20	2	0	0	90	1	13	350	7119.00	33	350	400	350		
H2510	Seasonal ...	80	15	0	0	30	1	6	200	88.00	34	200	200	200	300	200
H2520	Seasonal ...	0	0	0	0	30	1	4	200	266.00	46	200	100	200	100	200
H2810	Seasonal ...	20	34	0	0	30	1	2	100	175.00	164	100	0	0	0	0
H2830	Seasonal ...	300	94	0	0	30	1	3	0	0.00		0	0	100	100	100
H4010	Seasonal ...	20	10	100	0	30	1	4	145	253.75	63	145	79	76	83	81

To export the plan to Excel, do the following:

1. Go to the **Inventory planning** tab.
2. Click the **Export report** button in the tab toolbar (see figure below).



Streamline automatically creates an Excel file containing the exported report and opens it in Excel (see figure below).

A	B	C	O	P	Q	R	S	
		Purchase plan						
	Category	Item code	Jan 2016	Feb 2016	Mar 2016	Apr 2016	May 2016	
1	Concrete Block	C1020	20	75	71	81	82	
2	Fence	F1020	0	0	0	0	0	
3	Handles	H1010	13	12	11	14	15	
4	Handles	H1020	250	250	250	350	300	
5	Hinges	H2010	350	400	350			
6	Hinges	H2020	350	400	350			
7	Nails	H2510	200	200	200	300	200	
8	Nails	H2520	200	100	200	100	200	
9	Screws	H2810	100	0	0	0	0	
10	Screws	H2830	0	0	100	100	100	
11	Padlocks	H4010	145	79	76	83	81	
12	Stain	H7020	486	523	509	579	568	
13	Stain	H7030	389	439	426	472	474	

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