



There are several Options that must be setup before you can implement Inventory Planner. Many of these options will need to be enabled by an Epicor Representative; however, we will review each of them now so you can understand all of the capabilities available to you.

Option ID# 1034: 'Inventory Planner on System'. This will need to be set to Yes and is required for Inventory Planner to function on your Eagle.

Options ID# 1095: 'Enhanced Lead Times on System'. Option should be set to Yes for Inventory Planner to have full functionality. When this feature is enabled, the Eagle system tracks the actual lead times by item for purchases. Inventory Planner uses this data as part of its calculation of safety stock when using Service Levels.

Options ID# 9680: 'Set PO Due Dates for these PO Types using Average Lead Times'. Allows you to decide when you would like the system to automatically calculate Expected Dates from the lead time data based on PO type. The most common choice here would be N for Normal. Leaving this option blank causes the system to calculate the Expected Date from the static lead time value entered on the vendor's record in Vendor Maintenance for all PO types.

Options ID# 9681: 'Default Update Lead Times to No for these PO Types'. With this option you decide which types of PO's will NOT automatically calculate lead times. For example, many promotional PO's have unusually long lead times, so these types of PO's would normally not be figured into the lead times. We recommend entering all PO types *except* Normal here.

Options ID# 3057: 'Consider Transfers In'. Set this option to Yes if you want any inbound transfers to reduce usage for the purposes of calculating Order Points. This is a global setting that can be overridden at the rule level, so you should set this option based on how you want it to work most of the time.

Options ID# 3059: 'Consider Transfers Out'. This option should be set to Yes if you want outbound transfers to be considered usage for the purposes of calculating Order Points. Like 3057, this is also a global setting that can be overridden at the rule level. So, be sure to answer this based on how you want it to work most of the time.



Options ID# 1057: Multiple Order Points on System and set it to Yes. Now you will have four additional order points for each item.

Options ID# 3055: 'Consider "Unusual Usage" (in ITR) in order point calculation'. Controls Unusual Usage. Set this to Yes to remove any unusual usage quantities from the usage amounts.

Options ID# 3056: 'Consider "Lost Sales" (in ITR) in order point calculation'. Set to Yes if you'd like any Lost Sales amounts to be included in usage.

Options ID# 3058: 'Percentage of "Lost Sales" (in ITR) to use in order point calculation'. If you answer Yes to Options ID# 3056, you can set with a percentage of lost sales to use.



Inventory Planner is controlled by two security bits: 233 and 246.

Bit 233 allows access to Inventory Planner, but does not allow the user to update any Order Points to the system.

Bit 246 allows the user to access Inventory Planner and the ability to post updated Order Points to the system. When you've determined who will be using Inventory Planner, you can use these bits to control the level of access to its features.

