In this module, you will learn about how to Manage Plans within Inventory Planner.

This function lists all of the Plans on your system along with useful information about each.

From this screen you can execute, analyze, close, duplicate, edit, and delete plans.

Let's open 'Manage Existing Plans' from the Start Page and dive in.

The Manage Plans screen lists every Inventory Plan currently on your system.

As you highlight a plan, the 'Plan Properties' box on the right side of the screen displays key information.

Listed are the Plan 'Name' and 'Description', along with the related 'Item Set'.

Use the 'Item Set' hyperlink if you want to see the actual list of SKUS on the selected Plan.

The 'Global Levels' area of the Plan Properties box lists all of the Global Settings

The 'Associated Rules' area will identify the related Rules and their order on the Plan.

The History section shows you historical information such as the 'Date of Last Edit' and 'Date of Last Update'.

Date of Last Update indicates the last time the Plan was run with the update options

For example, if you choose to update at least 1 Order Point, then the date would be updated. However, if you execute a Plan, but choose not to update any Order Points, this field will not be updated.

This allows you to see at a glance which plans may be currently in use.

Finally, the 'Time to Update' field confirms how long it took this Plan to Execute and update the Eagle system.

This is purely informational. But as you develop new plans, it will help you to judge how much time they will take to execute.

Now that we’ve reviewed the historical information for each Plan, let’s take a look at the various action buttons beginning with the Execute button on the left.

After highlighting a plan, simply click the ‘Execute’ button to immediately run the plan.

You will receive a confirmation message indicating that the plan has been submitted to the scheduler.

If there was an output file selected you will be notified that it was placed in the Spooled Tasks viewer.

You can also perform a Plan ‘Analysis’ from the Manage Plans screen.

Highlight the Plan you wish to Analyze, and click the ‘Analyze’ button.

The results are displayed on screen.

Keep in mind that if this is a large plan, it may take some time for the Analysis to complete.

On the right hand side of the list you’ll see 4 additional action buttons.

The first button is labeled ‘Close’.

Clicking this button closes the Manage Plans screen.

You can also close this screen by clicking the X in the title bar.

Selecting the ‘Duplicate’ button creates an exact copy of a highlighted plan.

The system then takes you to the newly created Duplicate Plan where you can make changes. Settings from the original plan are carried over.

Using the Duplicate functionality is a great way to quickly create multiple plans for different stores or groups of items.

Sometimes you may want to modify an existing plan. You can do this by highlighting the Plan and clicking the ‘Edit’ button.

The information opens in the Maintain Plans window and you can make any changes you need to before Saving.

The last action button on the Manage Plans screen is the ‘Delete’ button.

If you’re sure you will never use a particular plan again, you can highlight it and click ‘Delete’.

This is the only place within Inventory Planner where this function is available. Once a Plan is deleted, there is no way to retrieve it.

As you can see, the Manage Plans screen offers a central location to review existing plans, execute or analyze them, and to edit or delete their details.

Take some time to explore this function and utilize all of its valuable features.