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Reservations in Business Central – a hopeless headache or a useful tool to lock inventory?

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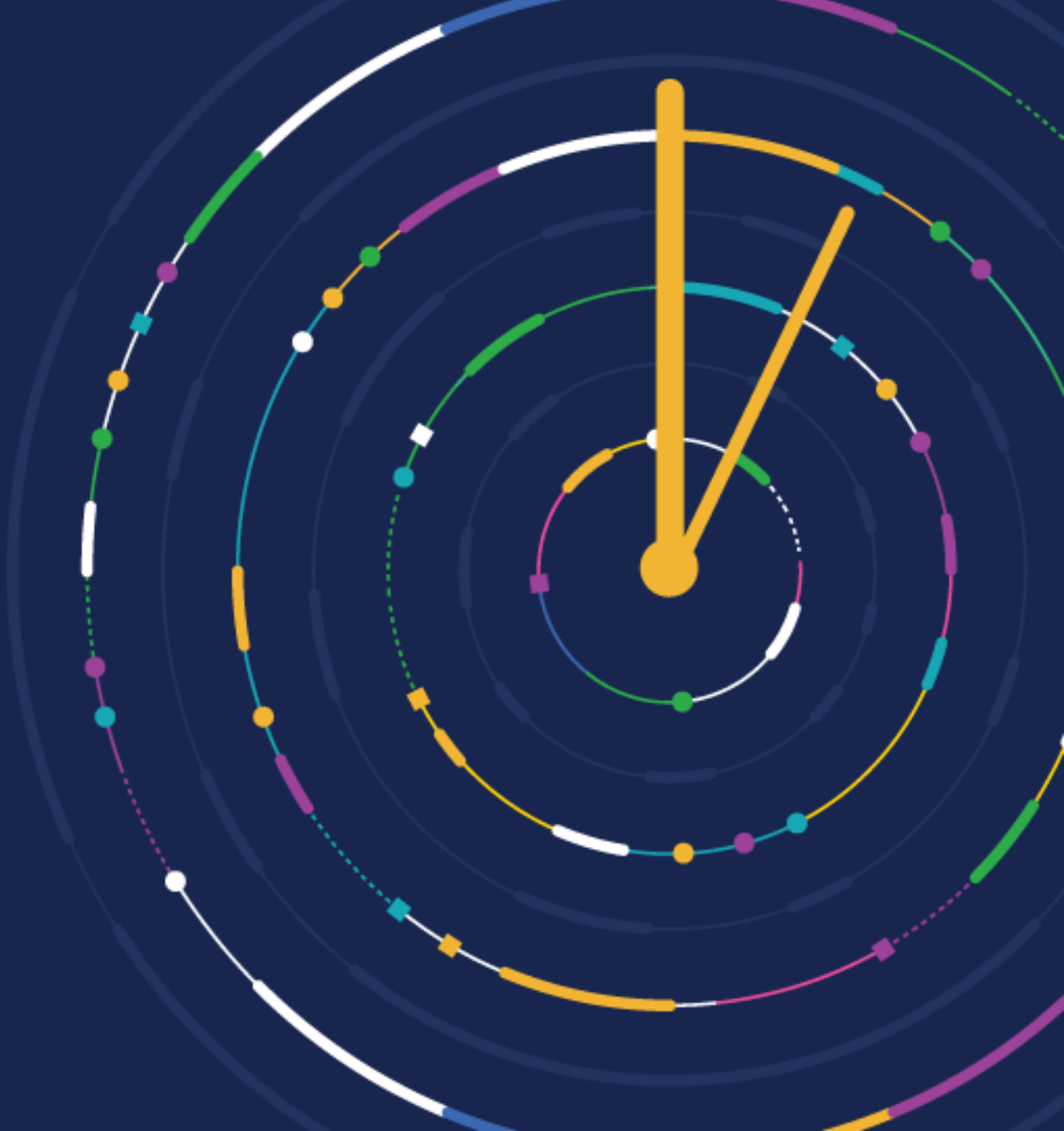


CUSTOMER DAY 2023

Introductions

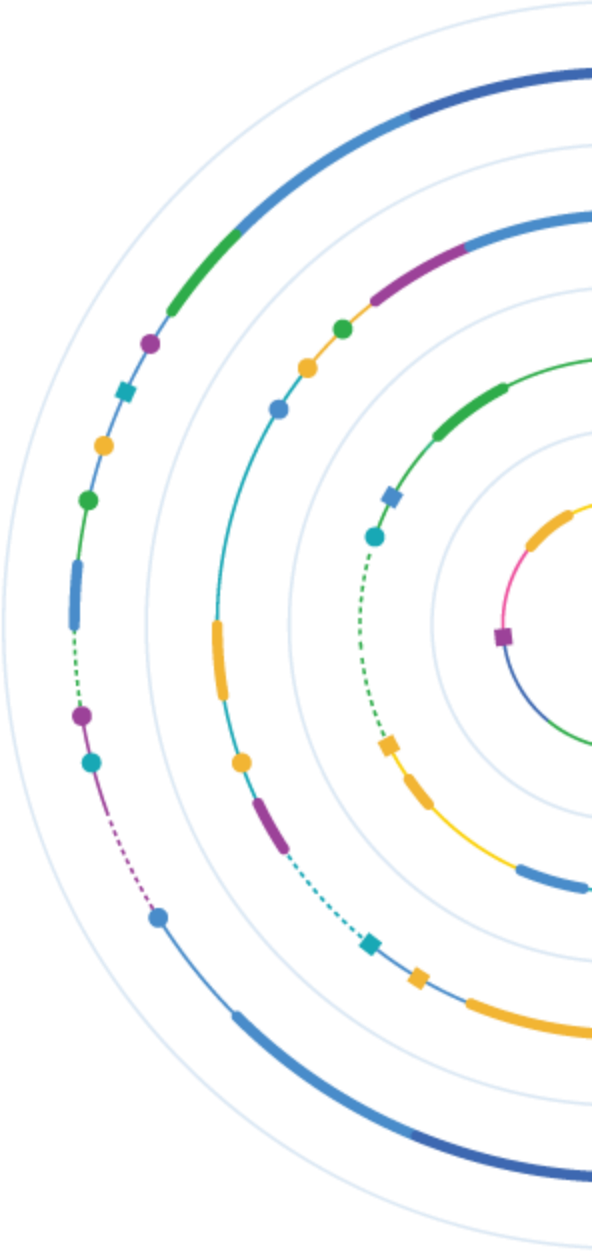
Agenda

- What are Reservation Entries
- Useful tool
- Hopeless mess
- Future changes
- Summary

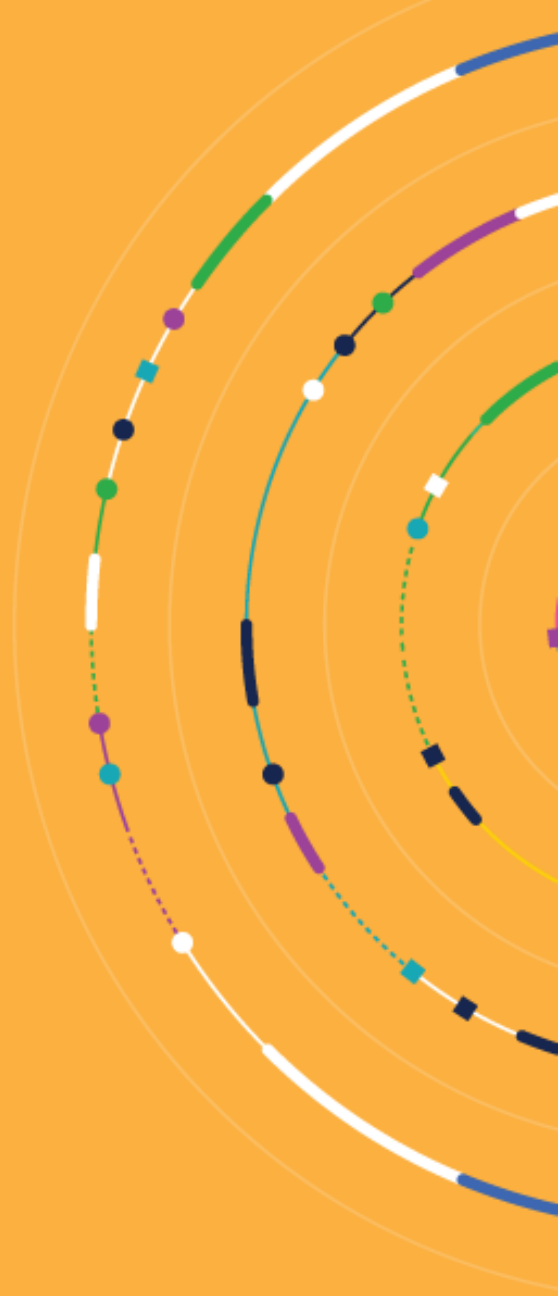
What are Reservations

What are Reservations?

- Different types of reservations
- Reservations can be triggered via a process i.e., Planning
- Reservations can be triggered via an action i.e., Reserve function



Useful Tool



Why use Reservations?

- Availability is based assumptions
- Specific demand i.e., Export
- Transport efficiency
- Demand/supply linked
- Stock outs

Business Rules / Requirements

- Who should create/cancel Reservations?
- What date range should you allow Reservations?
- What happens if the Customer is Credit Held/Overdue?
- Who decides on priorities?
- What happens when inventory that is reserved is written off?
- What Bins should be reserved?
- Do you reserve inventory or documents?
- What happens if supply is delayed?
- Partial/Complete shipment

Limitations of standard reservations

- Standard is not efficient
- ALWAYS reserve may require manual intervention
- No date limitations
- No distinction of inventory/documents reservations
- No visibility of what can be made i.e., Assembly
- Special Orders don’t create reservations
- Reservations work at inventory not Bins

Customise

- Can we customise reservation processes?
- Why Customise? BUT potentially will increase
  - Complexity
  - Unit Testing
  - User Acceptance Testing

However, if done properly on stable business rules should make your processes more efficient and offer a return on investment

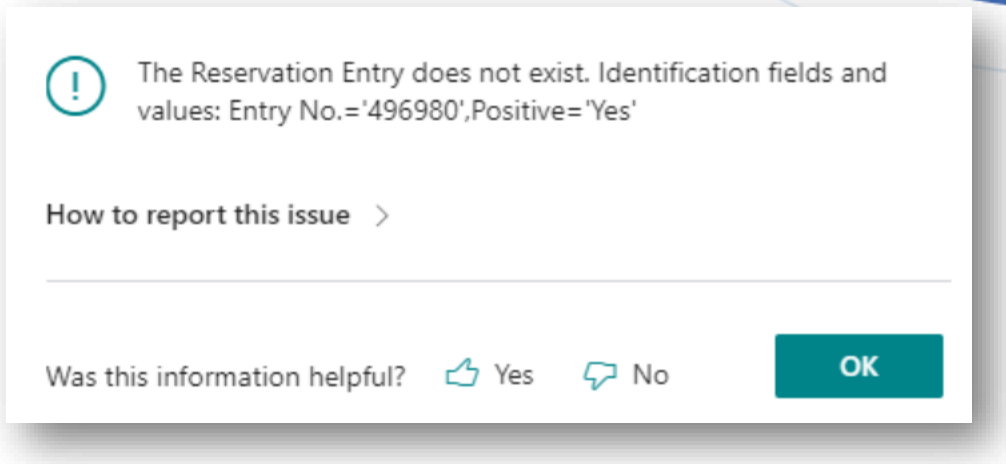
Hopeless Mess

Complicated engine which requires regular maintenance

- Originally designed to support “true” reservations, nowadays different types of Entries coming from different sources into one table – constantly moving data
- The demand will always be linked to either supply currently in stock (available on Inventory) or stock that is scheduled to be available, this is not always accurate
- Any changes to documents (e.g. Location, Shipment Date, Quantity) will trigger re-shuffling
- Changes to reservations can only be manual

What are the symptoms?

- The most common issue – orphaned entry
- Not able to post transactions
- Costing issues – as the link determines how Item Ledger Entries will be applied to each other after posting
- 180 cases logged so far in 2023 for **all types** of Reservation Entries issues
- Microsoft provides regular hotfixes

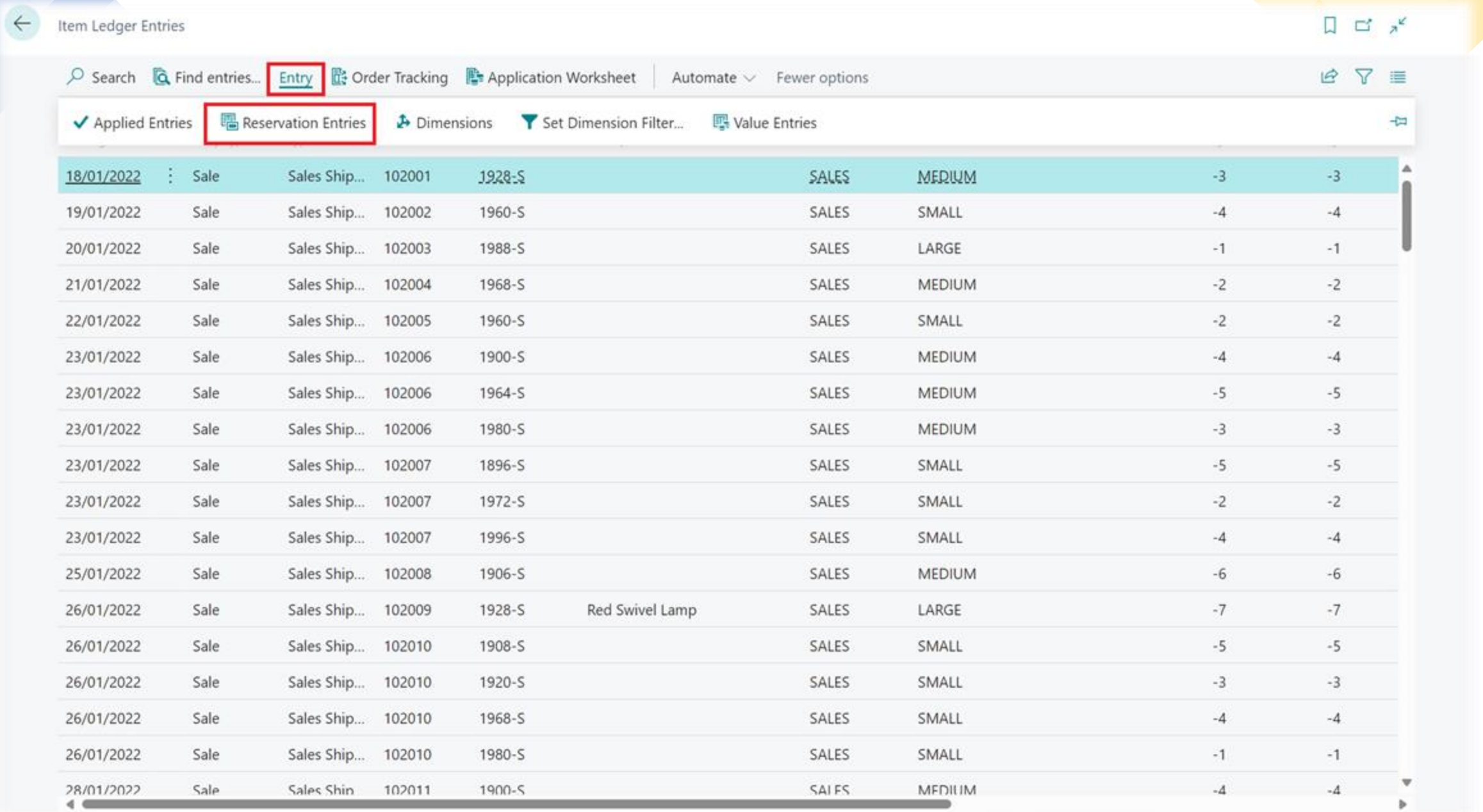


What can cause problems?

- Lot and Serial Tracking
- 3rd Party Products – code visibility
- Bespoke functions – the importance of testing
- Changes to processes – what we scope for cannot predict future business requirements
- Microsoft updates – the importance of signing up for Cloud Control
- Damaged stock and incomplete delivery and delays

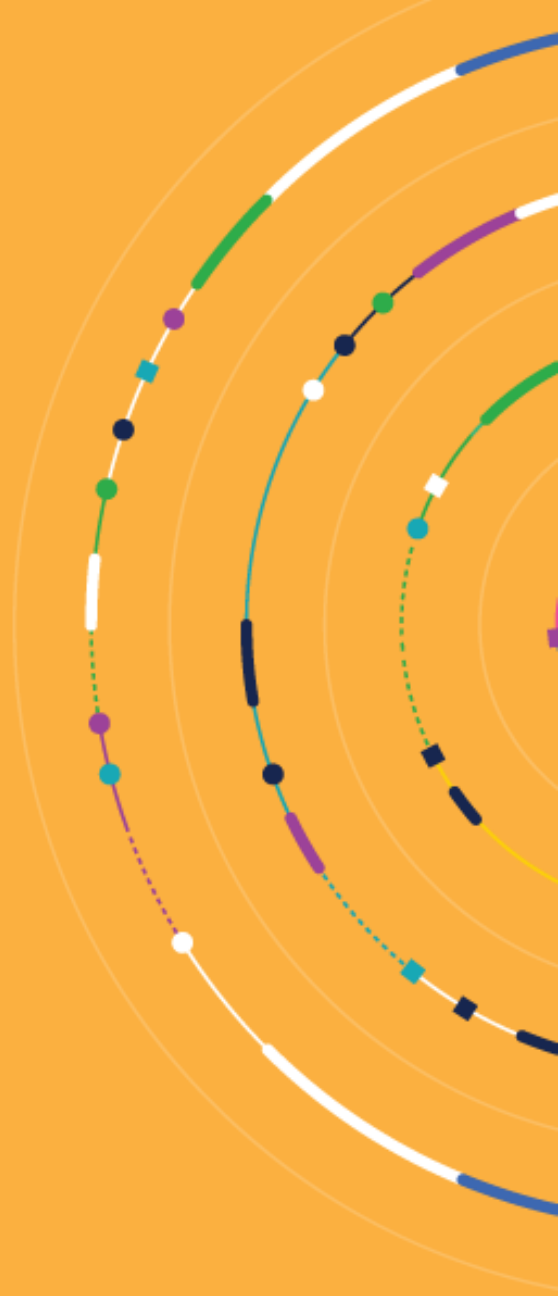
Difficult to troubleshoot

- Fixing data is not always straightforward – deleting is not always an option
- We see the problem after it's already happened
- Very hard to replicate if a problem occurs
- Users can access the table (337) but cannot modify
- SAAS platform allows to troubleshoot it easier



18/01/2022	Sale	Sales Ship...	102001	1928-S		SALES	MEDIUM	-3	-3
19/01/2022	Sale	Sales Ship...	102002	1960-S		SALES	SMALL	-4	-4
20/01/2022	Sale	Sales Ship...	102003	1988-S		SALES	LARGE	-1	-1
21/01/2022	Sale	Sales Ship...	102004	1968-S		SALES	MEDIUM	-2	-2
22/01/2022	Sale	Sales Ship...	102005	1960-S		SALES	SMALL	-2	-2
23/01/2022	Sale	Sales Ship...	102006	1900-S		SALES	MEDIUM	-4	-4
23/01/2022	Sale	Sales Ship...	102006	1964-S		SALES	MEDIUM	-5	-5
23/01/2022	Sale	Sales Ship...	102006	1980-S		SALES	MEDIUM	-3	-3
23/01/2022	Sale	Sales Ship...	102007	1896-S		SALES	SMALL	-5	-5
23/01/2022	Sale	Sales Ship...	102007	1972-S		SALES	SMALL	-2	-2
23/01/2022	Sale	Sales Ship...	102007	1996-S		SALES	SMALL	-4	-4
25/01/2022	Sale	Sales Ship...	102008	1906-S		SALES	MEDIUM	-6	-6
26/01/2022	Sale	Sales Ship...	102009	1928-S	Red Swivel Lamp	SALES	LARGE	-7	-7
26/01/2022	Sale	Sales Ship...	102010	1908-S		SALES	SMALL	-5	-5
26/01/2022	Sale	Sales Ship...	102010	1920-S		SALES	SMALL	-3	-3
26/01/2022	Sale	Sales Ship...	102010	1968-S		SALES	SMALL	-4	-4
26/01/2022	Sale	Sales Ship...	102010	1980-S		SALES	SMALL	-1	-1
28/01/2022	Sale	Sales Ship	102011	1900-S		SALES	MEDIUM	-4	-4

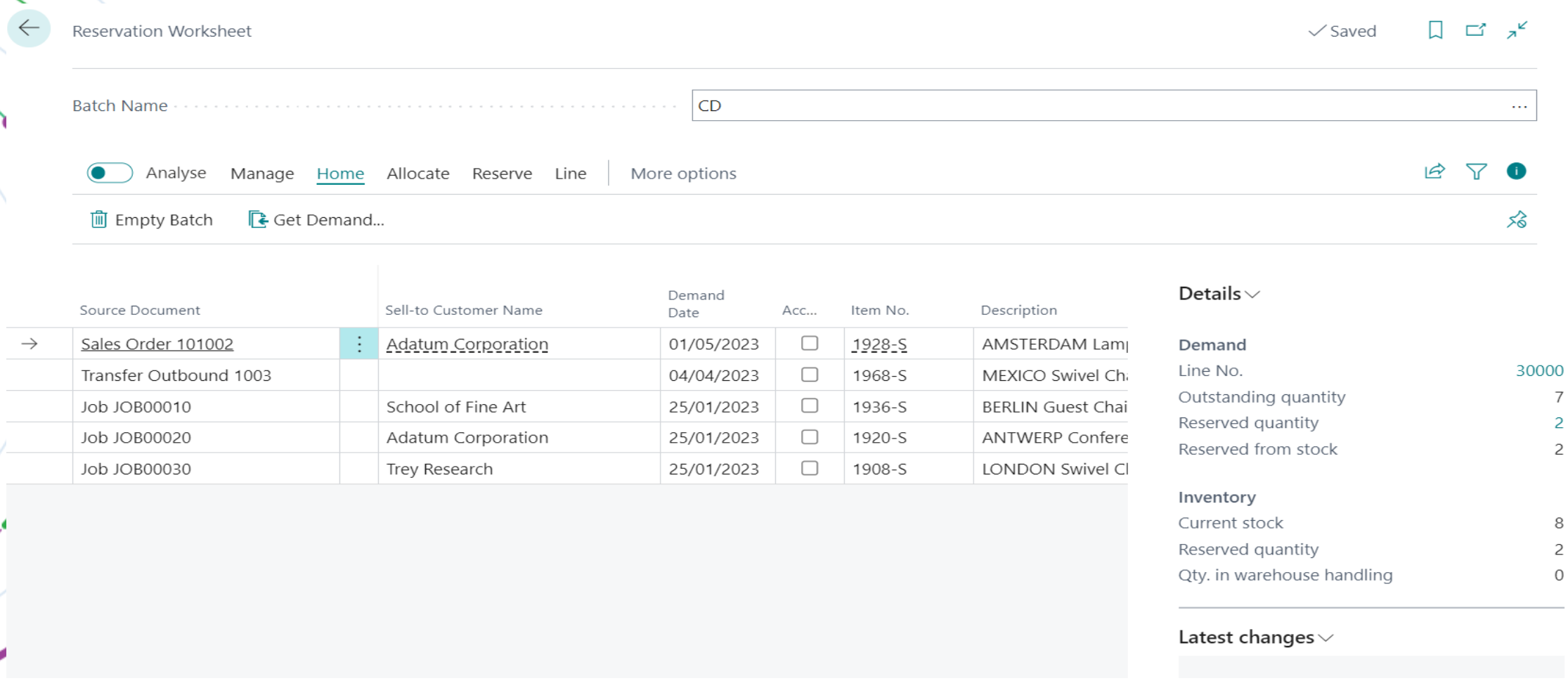
What's New



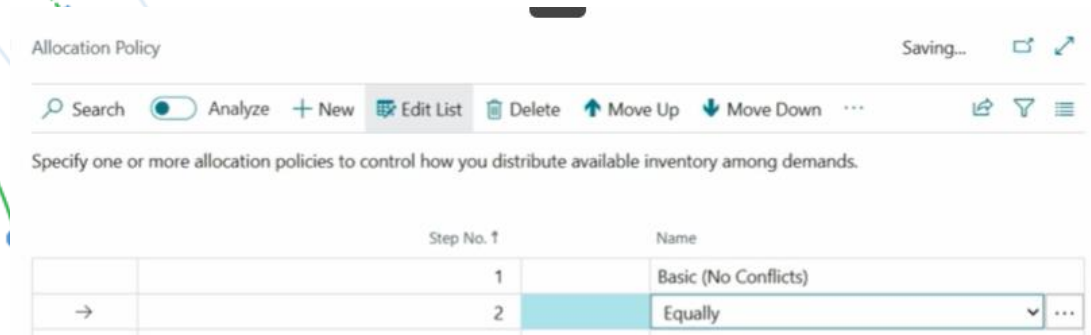
What's new in BC?

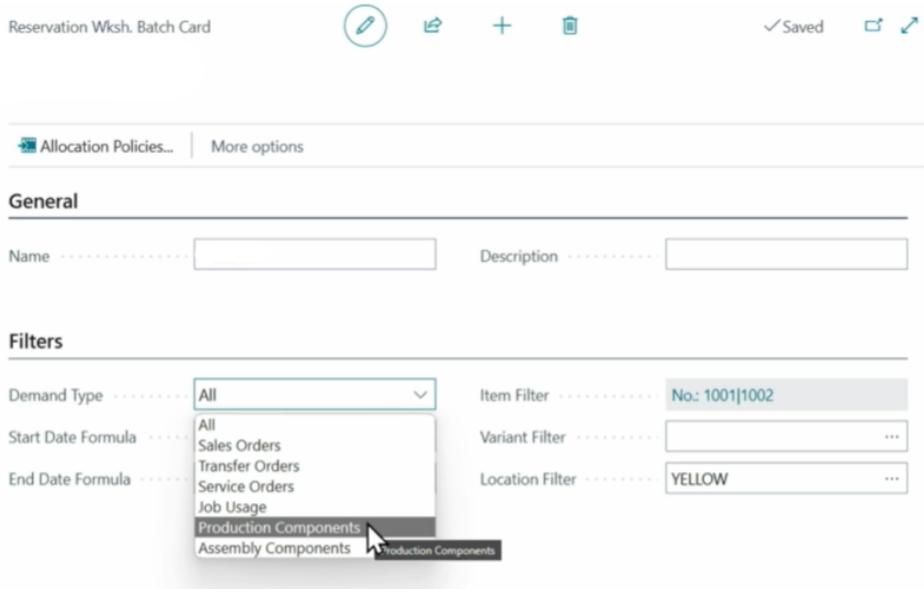
- Reservation Worksheet (Batches/bulk reserve)
- Ability to check the status of the demand document
- Ability to move documents to the next stage

Reservation Worksheet



Reservation Batches





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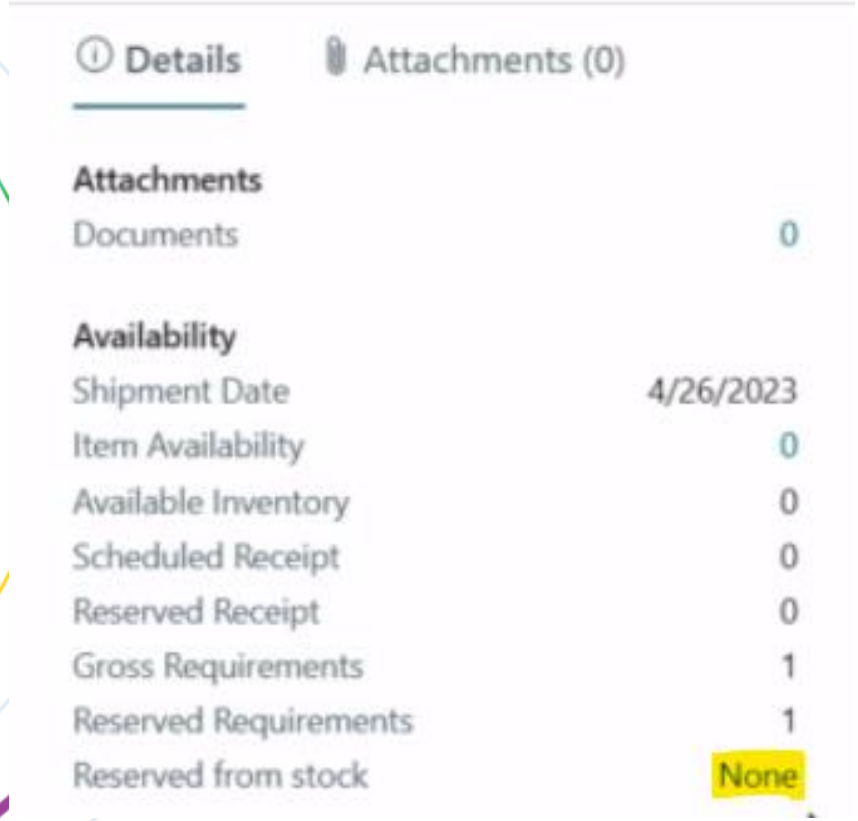
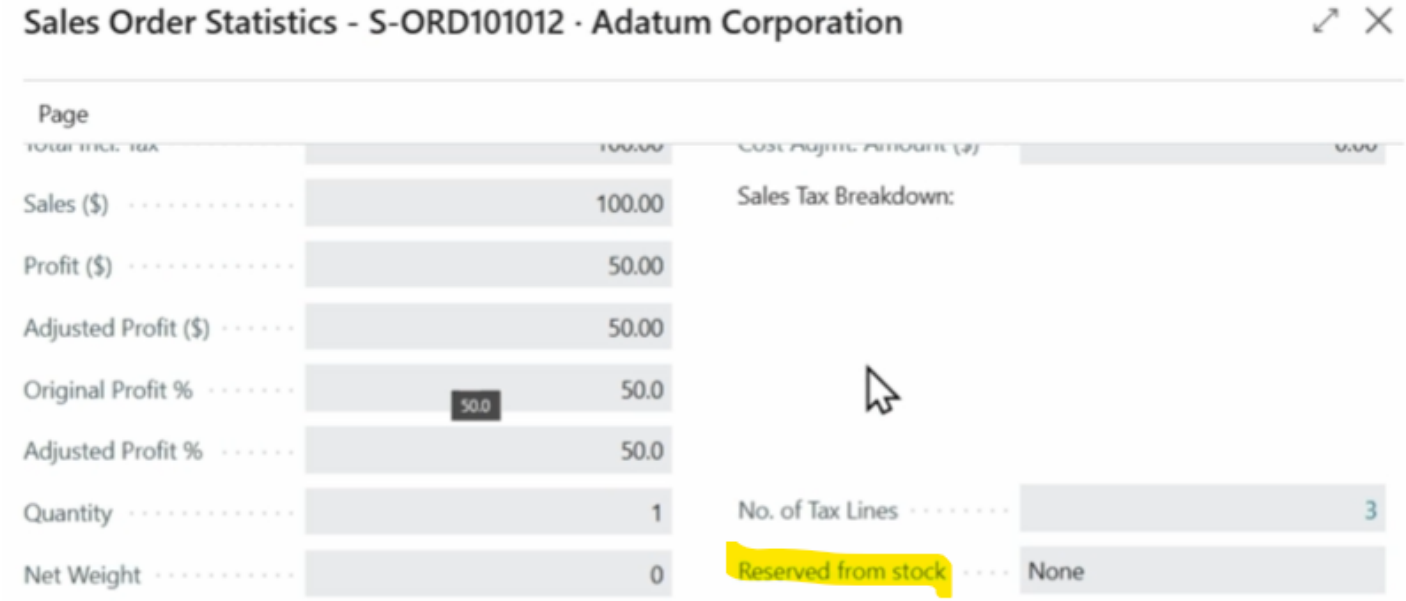
Sales Document (FactBox / Stats)





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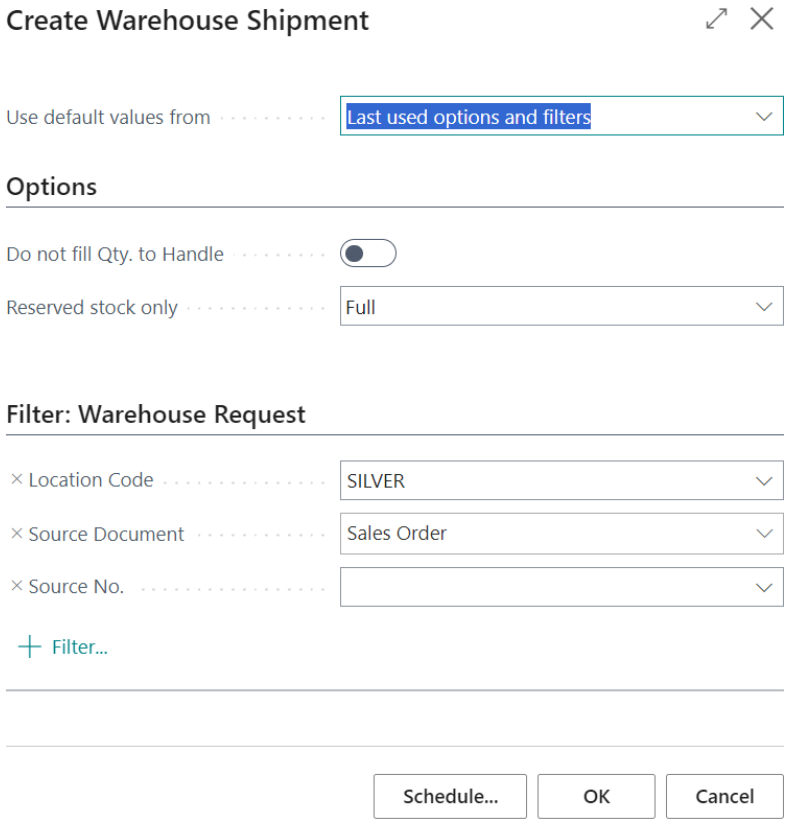
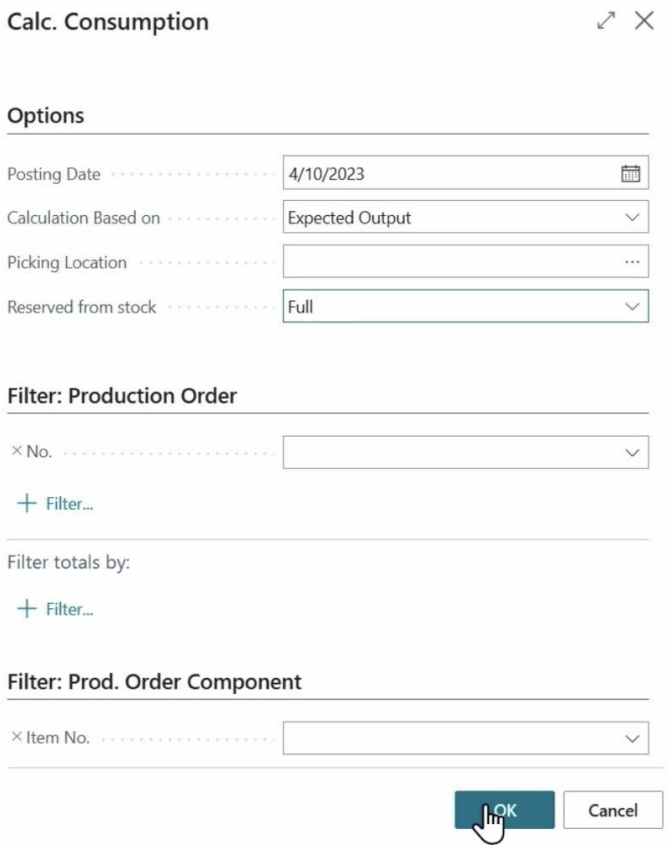
Next Stages


Create Warehouse Shipment
Use default values from
Last used options and filters
Options
Do not fill Qty. to Handle
Reserved stock only
Full
Filter: Warehouse Request
Location Code
SILVER
Source Document
Sales Order
Source No.
Filter...
Schedule...
OK
Cancel


Calc. Consumption
Options
Posting Date
4/10/2023
Calculation Based on
Expected Output
Picking Location
Reserved from stock
Full
Filter: Production Order
No.
Filter...
Filter totals by:
Filter...
Filter: Prod. Order Component
Item No.
OK
Cancel

Summary

QUESTIONS ?

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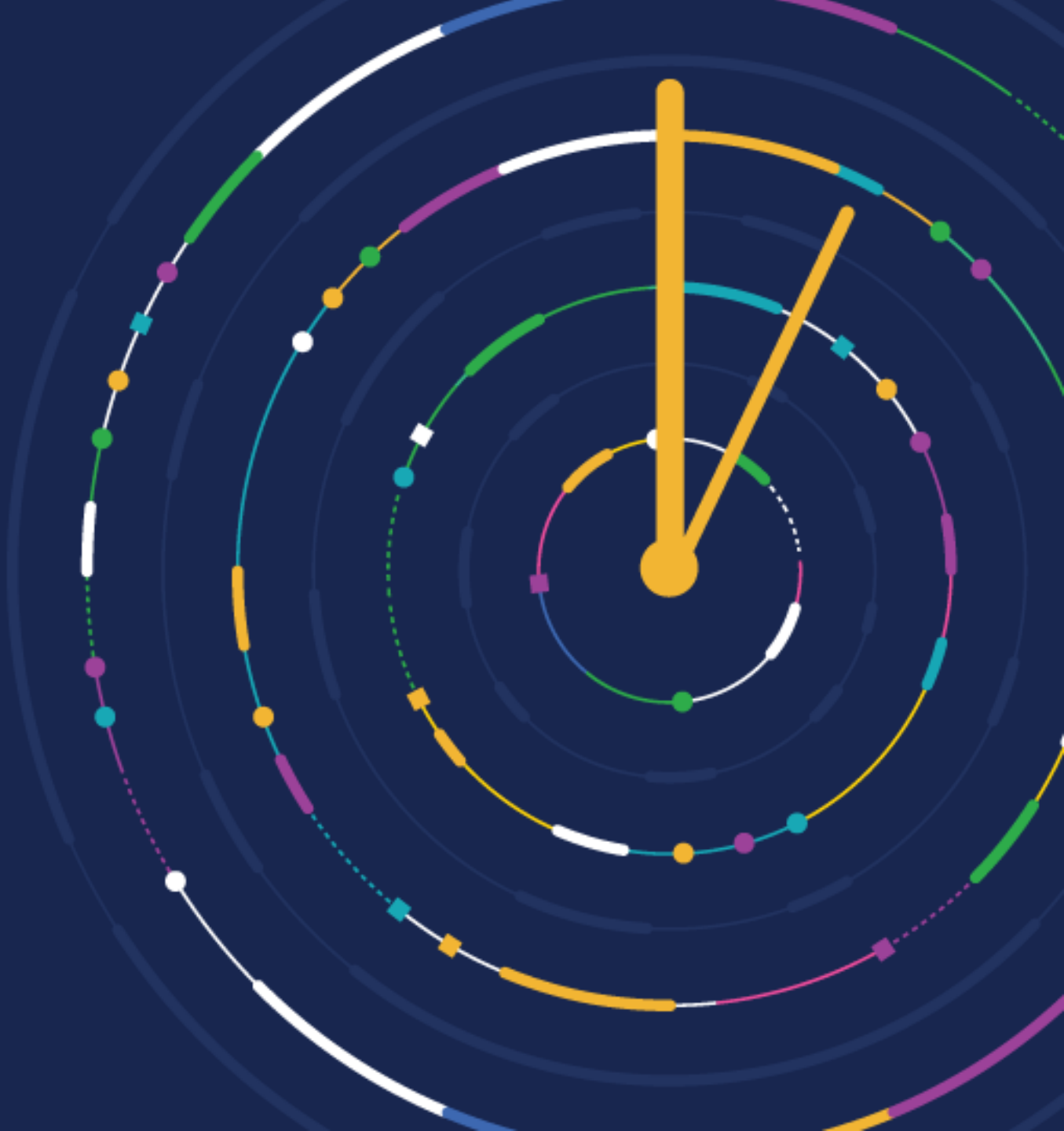
THANK YOU



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