



Inventory Availability Planner

User manual

Use Inventory Availability Planner to review current stock, expected supply and demand, and future shortages by Item, Variant and Location in Microsoft Dynamics 365 Business Central.

This manual explains setup, daily planning and stock calculations. Existing company settings can differ from the defaults shown.

Manual contents

- Purpose, access and company setup
- Item, Variant and Location eligibility
- Timeline, filters, status buttons and shortage navigation
- Inventory Detail and Stock Movement information
- Sales, purchase and transfer calculations and units of measure
- Worked examples, daily workflows and troubleshooting

Purpose and planning concepts

Inventory Availability Planner brings posted stock and expected physical inventory movements into one visual workspace. Use it to investigate current availability, expected receipts, future shortages and movements between Locations.

The planner displays three levels:

- **Item:** eligible stock and movements across its eligible Variants and Locations.
- **Variant:** eligible stock and movements for one Variant across its eligible Locations.
- **Location:** stock and movements for the exact Item/Variant/Location combination.

A positive Item total does not guarantee stock at every Location or for every Variant. Expand the hierarchy before deciding whether a particular sale or transfer can be supplied.

On-hand stock comes from posted Item Ledger Entry quantities through Today. **Demand** is a qualifying outstanding movement that removes stock. **Supply** is a qualifying outstanding movement that adds stock. **Projected stock** combines stock with dated movements.

The planner reads Business Central data. It does not post documents, reserve stock, release orders or automatically replenish inventory. Open the underlying documents to make operational changes using the normal Business Central processes.

Opening the planner

1. Open Business Central in the company you want to review.
2. Use **Search / Tell Me** to find **Inventory Availability Planner**.
3. Open the page and allow the loading operation to complete.
4. Review the status buttons and timeline.

The planner has its own title inside the workspace.

To configure it, search separately for **Inventory Availability Planner Setup**. There is no Setup action on the planner page.

Your administrator must have installed the extension and granted appropriate access. Opening source documents also depends on your normal Business Central permissions.



Configuring the planner

Open **Inventory Availability Planner Setup**. Settings apply within the current company. After changing them, return to the planner and select **Refresh**, or reopen it.

General

Setting	Meaning	Default for a new setup
Calendar Start	Choose Today, Beginning of Month, or Beginning of Prior Month.	Today
Maximum View Timeframe	Choose 2, 3, 4, 5 or 6 calendar months from the selected starting date.	2 Months
Treat Blank Shipment Dates as Today	Include qualifying outbound movements without dates on Today. Otherwise exclude them.	Off
Treat Blank Receipt Dates as Today	Include qualifying inbound movements without dates on Today. Otherwise exclude them.	Off
Items without Stock or Activity	Include eligible Items with zero eligible stock and no qualifying activity.	Off
Enable Expand All Lines	Allow expansion of all Item branches on the current Item page.	Off

Calendar history: When the calendar starts before Today, earlier balances are reconstructed from posted inventory movements. Open sales and purchase lines dated before Today are still excluded. Showing prior-month history does not turn overdue open lines into future activity.

End date: The period ends one day before the selected-month anniversary of the starting date. For example, a start of 1 September with 3 Months ends on 30 November. A start of 13 October with 2 Months ends on 12 December.

Performance confirmation: Changing Maximum View Timeframe displays a warning about potential performance implications. Accept to apply the new value; decline to retain the previous value. Change this field interactively in Setup.

Blank dates: Shipment and receipt policies are independent. The policy follows the direction of the physical movement. For example, an inbound sales return uses the receipt policy when its movement date is blank.

Include In Planner

Each document type has its own switch:

Group	Options	Defaults
Sales	Sales Orders, Sales Return Orders, Sales Invoices, Sales Credit Memos	Sales Orders on; other types off
Purchases	Purchase Orders, Purchase Return Orders, Purchase Invoices, Purchase Credit Memos	Purchase Orders on; other types off
Transfers	Transfer Orders	Off



These switches control outstanding document movements, badges and document breakdowns. Disabling a source does not remove inventory that has already been posted at an eligible Location.

Diagnostics

Debug enables collection of main-load performance diagnostics and makes the **Performance Diagnostics** action available. It defaults to off. With Debug off, the planner does not collect diagnostic timing and counting information. Refresh or reopen after changing it.

Item, Variant and Location eligibility

The planner considers **Inventory-type Items**. Sales and purchase document lines must have **Type Item**.

It excludes:

- Blocked Items.
- Blocked Variants.
- Items, Variants and Locations marked **Exclude from Inventory Planner**.
- Locations marked **Use As In-Transit**.

The planner exclusion field is available on the **Item Card**, **Item Variants** page and **Location Card**. Its displayed caption may be abbreviated in a narrow layout.

Exclusions affect calculations before aggregation. Excluding a Location removes its stock and movements from Location, Variant and Item totals. Excluding a Variant removes its contribution to the Item total. These fields are more than visibility controls.

Blank Variant or Location codes can appear as **(Blank)** when that combination contributes stock or activity.

By default, an eligible Item is omitted if it has zero eligible stock and no qualifying future activity. Activity can still keep an Item visible even when its stock is zero; document totals can include qualifying dates beyond the displayed calendar.

Understanding the timeline

Reading a row

The left side identifies the Item, Variant or Location and shows its **Stock** quantity. This is posted on-hand stock through Today. It does not change to historical opening stock when the calendar begins in a prior month.

The timeline shows projected quantities in the Item's base unit:

- **Green:** zero or positive projected stock.
- **Red:** negative projected stock.
- **Movement badge:** the net outstanding supply minus demand for the displayed period.

A zero balance is classified as In Stock by the current app. It does not mean there is a positive quantity available to ship.

Day, Week and Month

View	Quantity shown	Movement badge
Day	Closing projected balance for that day.	Supply minus demand on that day.



View	Quantity shown	Movement badge
Week	Closing projected balance for the last displayed day of the week. Weeks begin on Monday.	Supply minus demand for the displayed days in that week.
Month	Closing projected balance for the last displayed day of the month.	Supply minus demand for the displayed days in that month.

The first and last displayed week or month can be partial periods. A positive week-ending or month-ending quantity can hide a temporary shortage earlier in that period. Use Day view to investigate the sequence.

Posted stock movements change projected quantities silently. They do not create outstanding demand/supply badges or posted-document breakdown entries.

Expanding rows and navigating

- Select a row's expansion arrow to load its child rows.
- Expand an Item to see Variants; expand a Variant to see Locations.
- Use **Expand All** only when enabled. It applies to the current Item page, not the entire catalogue.
- Use **Previous items** / **Next items** to move through pages of up to 100 root Items. Expanded children are additional rows.
- Use the period arrows or horizontal scrollbar to move across the timeline.
- Select **Today** to bring the current period into view. It does not change the Setup calendar starting point.
- Use **Full Screen** for additional working space where the browser supports it.

Searching, filtering and sorting

Use the search box to find matching Item numbers, descriptions, Variants or Locations. Use its clear button to remove the search text.

The dropdown filters are **Item**, **Variant**, **Location** and **Item Category Code**. Select **ALL** to remove a specific dropdown restriction. Available choices can narrow as other filters are applied.

Filtering locates matching branches. Parent rows retain their aggregate quantities; selecting a Variant or Location does not recalculate the Item total to contain only that selected branch. Read the matching child row for the exact combination.

The status buttons filter the Item population. Once an Item qualifies, its hierarchy can include both healthy and shortage branches so its totals remain understandable.

Sort by **Item No.** or **Earliest Problem**, and use the direction button to reverse the order. Earliest Problem is based on daily shortage information, so it can differ from the first negative weekly closing balance.

Clear All removes the planner filters. **Refresh** rereads BC data and clears loaded hierarchy/projection state. Refresh after posting, changing a relevant document, or changing Setup or exclusions.



Understanding status buttons

Each status button counts distinct Items, considering Item, Variant and Location levels. Counts refer to the loaded eligible Item population and are not reduced by a text search or the current page.

Button	Meaning
ALL	All Items included in the planner.
IN STOCK	Items with at least one non-negative balance Today, after Today's outstanding demand and supply.
OUT OF STOCK	Items with at least one negative balance Today, after Today's outstanding demand and supply.
FUTURE SHORTAGE	Items with a level that is non-negative Today but becomes negative within the displayed timeframe.
NO SUPPLY	Items with a current or future shortage at a level with no positive outstanding supply after Today within the displayed timeframe.

Categories overlap. An Item with overall stock of 100 and a Location balance of -10 can count as both In Stock and Out of Stock. Multiple negative Locations do not make that Item count multiple times in one cue.

No Supply describes the absence of positive future supply at the shortage level. Supply arriving too late or in an insufficient quantity can remove the No Supply classification while leaving a shortage unresolved.

Hover over the buttons for brief explanations.

Investigating shortages

Select the arrow beside Stock labelled **Go to first out of stock**. The planner may load the full branch, expand the affected hierarchy and briefly outline the target cell.

Current navigation depends on the view:

- **Day:** highlights the first negative daily balance.
- **Week:** stays in Week view and highlights the first negative week-ending balance. It skips a week whose daily shortage is repaired before its closing balance. Hover over the highlighted week for its explanation.
- **Month:** keeps Month view and highlights the month containing the first negative daily balance. The month's closing quantity may be positive.

If there is a temporary daily shortage but every weekly closing balance is non-negative, Week view has no negative weekly target. Use Day view to inspect the temporary shortage. A daily-shortage cue or navigation arrow can therefore exist without a negative week-ending quantity.

The outline is temporary. Click the relevant movement badge to investigate its documents. If several Locations first become short together, more than one target can be highlighted.

Inventory Detail fields

Select an Item, Variant, Location or stock cell to open **Inventory Detail**. The context below the description identifies the level being reviewed. **Open Item** opens the Item Card.



Field	Interpretation in the current app
Current Position	Today's posted stock less Today's outstanding demand plus Today's outstanding supply. Zero or positive is In Stock; negative is Out of Stock.
Demand	Total qualifying outstanding demand from Today onward for that level, including dates beyond the visible calendar.
Short	The magnitude of a negative Current Position; otherwise zero. It is Today's shortage, not the total or maximum future shortage.
Stock Available	Today's posted on-hand stock divided by the Demand total, expressed as a percentage and limited to 0–100%. If demand is zero, it displays 100%.
Incoming Supply	The next date on or after Today with positive outstanding supply for that level, and the supply quantity on that date. It can fall beyond the visible calendar.

Timeframe distinction: Clicking a future stock cell does not change Current Position or Short to that future date. Those fields still describe Today. The timeline cell is the place to read that future projected quantity.

Stock Available compares quantities only. It does not test receipt timing or guarantee that every sale can be fulfilled. The message **Current demand is covered by available stock** is tied to Today's shortage calculation; do not interpret it as a guarantee across the entire planning period. Hover over the fields to read these definitions in the app.

Stock Movement details and document navigation

Select a **movement badge** to open the Stock Movement panel for the selected day, week or month.

Field	Meaning
Demand	Outstanding movements removing stock during the selected displayed period.
Supply	Outstanding movements adding stock during the selected displayed period.
Net Movement	Supply minus demand for that period.
Projected	Projected closing stock for that period, including posted stock changes.

Demand Breakdown and Supply Breakdown show source document types/numbers, dates, party or transfer route, and quantities. Selecting a source opens the relevant Business Central document, subject to permissions. Select **Inventory Detail** to return to the general detail panel.

A badge of **±0** can still have documents behind it. Equal demand and supply net to zero but both remain visible in their respective breakdowns.



Sales, purchase and transfer calculations

Physical document directions

The following describes ordinary positive document quantities. Negative quantities can reverse the physical direction.

Document	Usual effect	Date field used by the planner
Sales Order	Demand	Sales Line Shipment Date
Sales Return Order	Supply	Sales Line Shipment Date
Sales Invoice	Demand where it represents an unposted physical movement	Sales Line Shipment Date
Sales Credit Memo	Supply where it represents an unposted physical movement	Sales Line Shipment Date
Purchase Order	Supply	Purchase Line Expected Receipt Date
Purchase Return Order	Demand	Purchase Line Expected Receipt Date
Purchase Invoice	Supply where it represents an unposted physical movement	Purchase Line Expected Receipt Date
Purchase Credit Memo	Demand where it represents an unposted physical movement	Purchase Line Expected Receipt Date
Transfer shipment	Demand at Transfer-from	Transfer Line Shipment Date
Transfer receipt	Supply at Transfer-to	Transfer Line Receipt Date

The app uses the date fields on the actual lines, not merely a header date. Review line dates when a movement appears on an unexpected day.

Remaining quantities and posted links

Demand and supply use remaining physical quantities. For ordinary lines this is base quantity less the base quantity already shipped, received or return-handled, as appropriate.

Invoices or Credit Memos linked to already-posted shipments/receipts are excluded from additional physical movement to avoid counting the posted stock change twice. Fully handled lines have no remaining physical quantity.

Open movements dated before Today are excluded. A dated overdue line is not treated as Today by a blank-date setting; correct its source date if appropriate for your business.

Transfers

Transfers are read from **Transfer Lines**, supporting businesses with and without advanced warehouse processes.

- Source demand = quantity still to ship.
- Destination supply = quantity still to receive, including stock already shipped but not yet received.
- Posted shipment entries already reduce source stock.
- In-transit Locations contribute no planner stock, movement, hierarchy or parent totals.



When source and destination are eligible and shipment/receipt fall in the same period, their effects can cancel at Item or Variant level. They remain distinct at Location level.

If one Location is excluded, only the eligible side contributes to the parent projection. If shipment and receipt occur on different dates, the usable parent quantity can fall between those dates and rise on expected receipt.

Posted inventory

Opening stock uses net ledger quantities posted through Today, including entries whose remaining quantity has become zero. Future-dated postings enter the projection on their posting date, rather than entering today's stock early.

Posted movements affect the balance but do not appear as outstanding sales/purchase/transfer source documents in the movement panel.

Units of measure

Stock, projected quantities, demand, supply and shortages are calculated in the **Item's base unit of measure**. The app uses BC's stored base quantities to combine differently measured document lines.

In document breakdowns, the remaining quantity can also be shown in the document UOM, using the conversion factor stored on that line.

Example: Base UOM is PCS; 1 BOX = 10 PCS. A receipt of 5 BOX contributes +50 PCS. A sale of 12 PCS contributes -12 PCS, leaving 38 PCS. After receiving 2 of the 5 BOX, the remaining expected receipt is 3 BOX, or 30 PCS.

Displayed quantities are formatted to a maximum of two decimal places. A very small fractional quantity can therefore appear rounded; inspect the source document when precision matters.

Worked examples

Receipt followed by a sale

Item **IP26A00016**, Variant **V3**, Location **IP26A-A** has zero opening stock. A 20-unit receipt is expected on 8 November; a 15-unit sale is due on 15 November.

Period	Expected projected stock
Before 8 November	0
8-14 November	20
From 15 November until the next movement	5

A 14-unit posted entry dated in December does not change these earlier balances. When December enters the displayed timeframe, that posting changes stock from its posting date.

Transfer with zero parent net movement

Transfer 7 units of one Variant from A to B, with shipment and receipt both on 12 December:

Level	Effect
Location A	-7
Location B	+7
Variant across A and B	0 net movement



Expand Locations to see where stock leaves and arrives. Both demand and supply can reference the same Transfer Order without duplication of the net parent quantity.

Different Day and Week shortage targets

Opening stock is 10. Demand of 20 on Wednesday makes it -10. Supply of 30 on Friday repairs it to 20. Demand of 25 the following week makes that week's closing quantity -5.

- Day navigation targets Wednesday's -10.
- Week navigation targets the following week's -5.
- The first week displays 20 because that is its closing balance.

Overlapping status counts

An Item has +110 at Location B and -10 at Location A, giving +100 overall. It can be included in both In Stock and Out of Stock. The Out of Stock count is a count of affected Items, not a count of negative rows.

Suggested daily workflows

Sales availability review

1. Refresh the planner.
2. Search for the Item and select the Variant.
3. Expand the required fulfilment Location.
4. Use Day view around the intended shipment date.
5. Read the projected balance and inspect any competing demand.
6. Open relevant source documents when dates or quantities need investigation.
7. Complete the normal BC availability/reservation checks before committing to fulfilment.

Purchasing and replenishment review

1. Select Future Shortage or No Supply.
2. Sort by Earliest Problem.
3. Expand the affected Variant and Location.
4. Locate the shortage in Day view.
5. Compare incoming supply dates and quantities with demand.
6. Review or amend purchase documents using normal BC processes.
7. Refresh to review the resulting projection.

Location transfer review

1. Confirm Transfer Orders is enabled in Setup.
2. Expand both source and destination Locations.
3. Review source availability on Shipment Date.
4. Review destination availability on Receipt Date.
5. Open the transfer from its movement breakdown if changes are required.



Performance, diagnostics and troubleshooting

For larger catalogues, use focused filters and individual expansion. Keep Expand All off unless bulk expansion is useful for the company's data volume. A longer timeframe and more included sources increase the work needed to prepare the view.

Paging limits displayed root Items to 100 per page; it does not mean calculations or cues only consider those 100 Items. Loading time also depends on ledger/document volume and server conditions.

Symptom	What to check
Item missing	Inventory type, blocked state, planner exclusion, eligible Variant/Location, filters, and the no-stock/activity setting.
Demand or supply missing	Source switch, Item line type, line date, blank-date policy, remaining base quantity, posted links and exclusions.
Stock differs from a general inventory figure	Posting date cutoff, future-dated postings, blocked/excluded branches and in-transit exclusion. Compare the exact Item/Variant/Location level.
Short is zero although a later cell is red	Short describes Today. Read the later projected quantity in the timeline.
In Stock equals All while Out of Stock is nonzero	Categories overlap across hierarchy levels. Expand negative branches.
Week/Month is positive despite a shortage cue	Period-ending stock can recover after a daily shortage. Inspect Day view.
Transfer shows equal demand and supply	Both eligible transfer sides contribute at the selected aggregate level. Expand Locations.
Badge is zero but documents appear	Supply and demand cancel within that period.
Future posted entry has no badge	Expected behavior: posted stock changes are silent.
Quantity differs from the document quantity	Compare base UOM with document UOM and the stored conversion factor.
Previous month shows stock but no overdue orders	Historical posted stock is reconstructed; historical open demand/supply is excluded.
No Supply is zero but shortages remain	Expected supply can be late or insufficient. Its existence is not a coverage guarantee.
Newly posted or changed data is not visible	Refresh the planner. If necessary, reopen it and confirm the company.
Expand All unavailable	Enable Expand All Lines is off in Setup. Individual expansion remains available.
Performance Diagnostics missing	Debug is off. Enable it temporarily, then refresh/reopen.



The planner is a dated physical stock projection. It does not independently simulate reservations, production or assembly demand, warehouse Bin availability, transport capacity, or automatic procurement. Use the relevant BC processes for those decisions.

When reporting an issue, provide the company, Item, Variant, Location, selected view, relevant dates, source document numbers, enabled sources, expected quantities and a screenshot. This makes it possible to reconcile the exact branch against posted and outstanding quantities.

Version Information

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