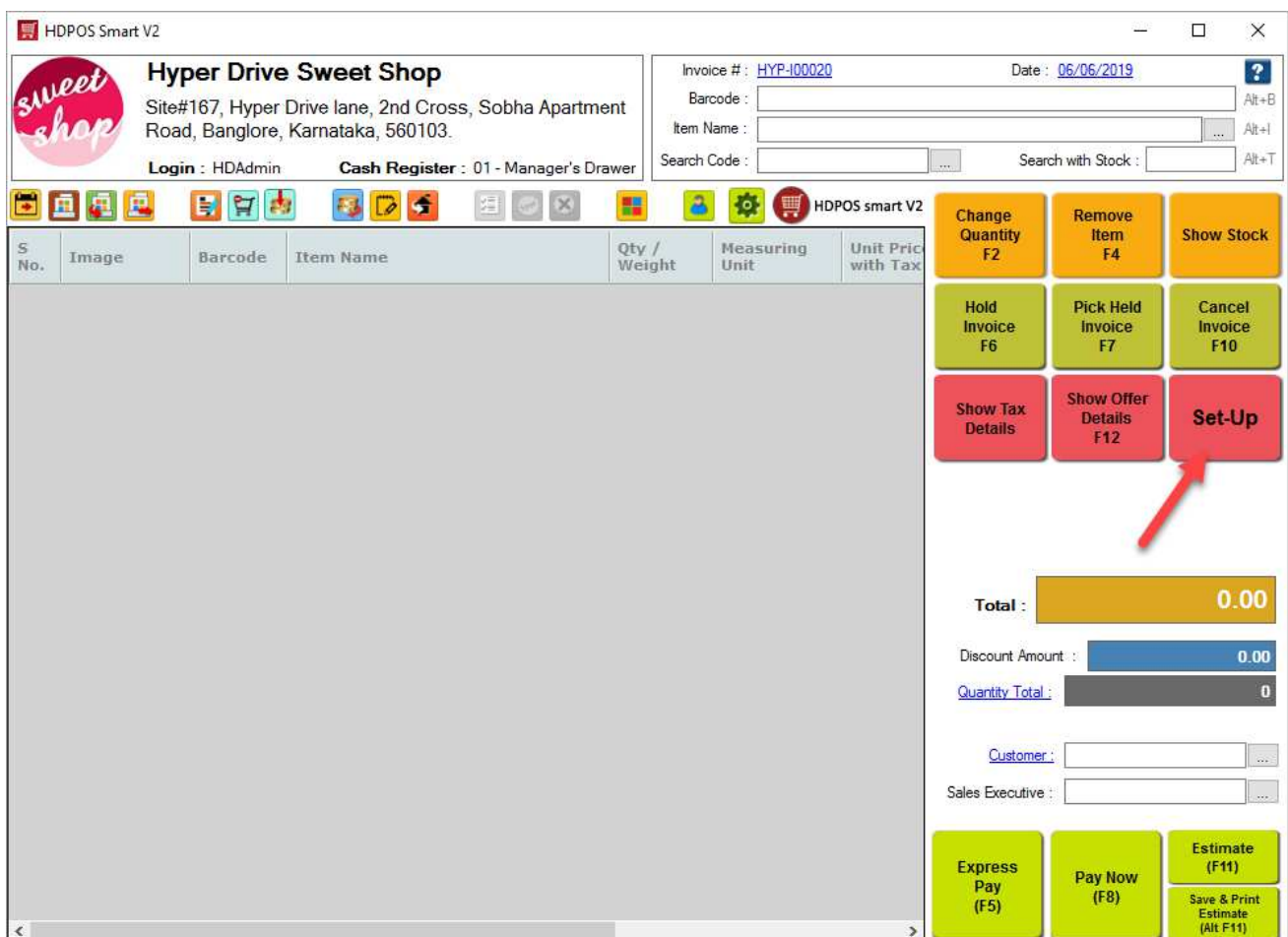


How to create a Make Plan document in HDPOS smart?

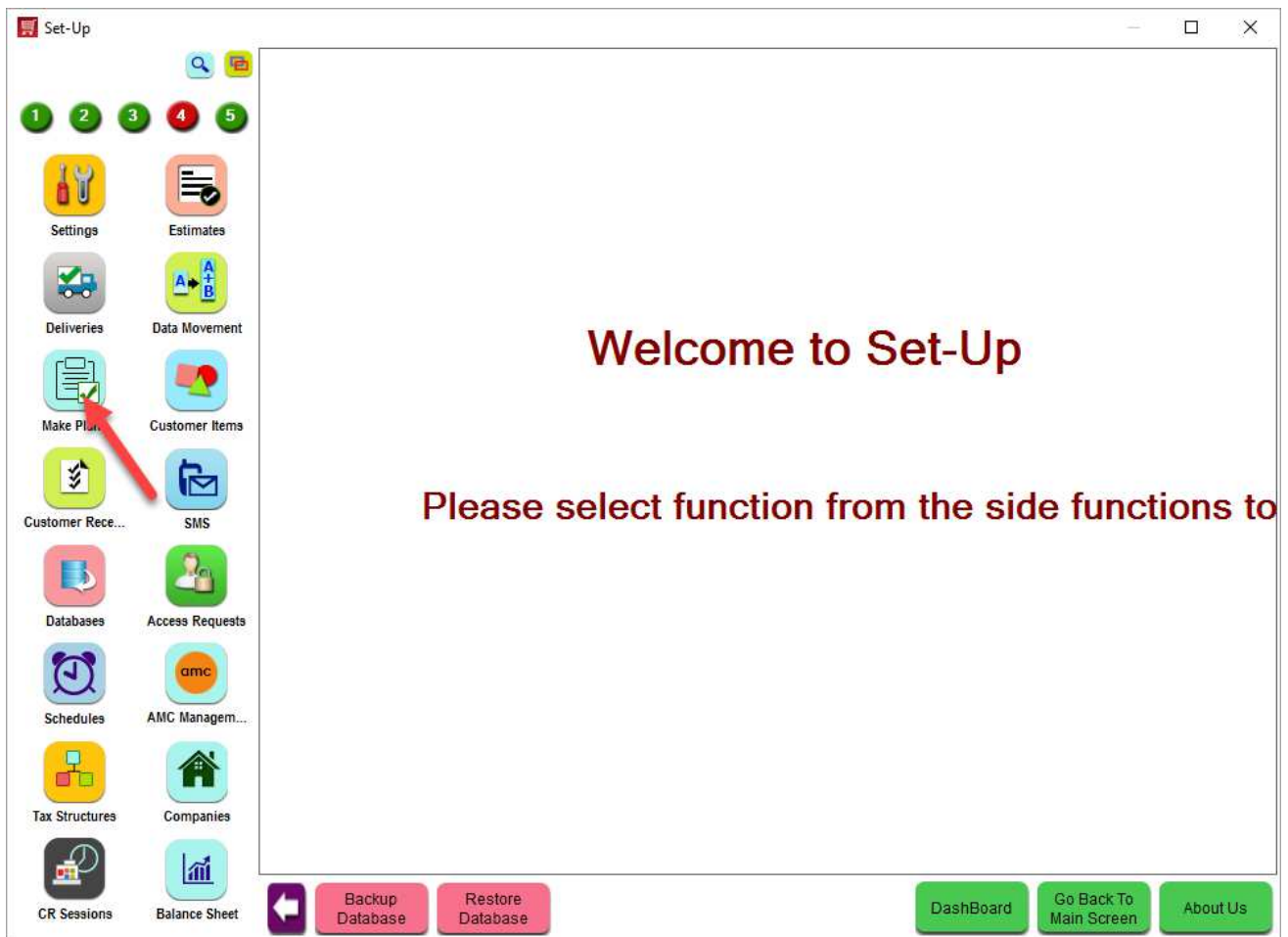
In HDPOS smart, we have a feature called Make Plan to handle the scenarios in which customer has ordered in bulk and you need to know how much quantity is available and how much do you need to complete the order. This type of scenarios often arises in businesses like Bakery Shops and Sweet Shops, where you have to prepare the Items that you are going to sell.

To create a Make Plan follow the below steps :

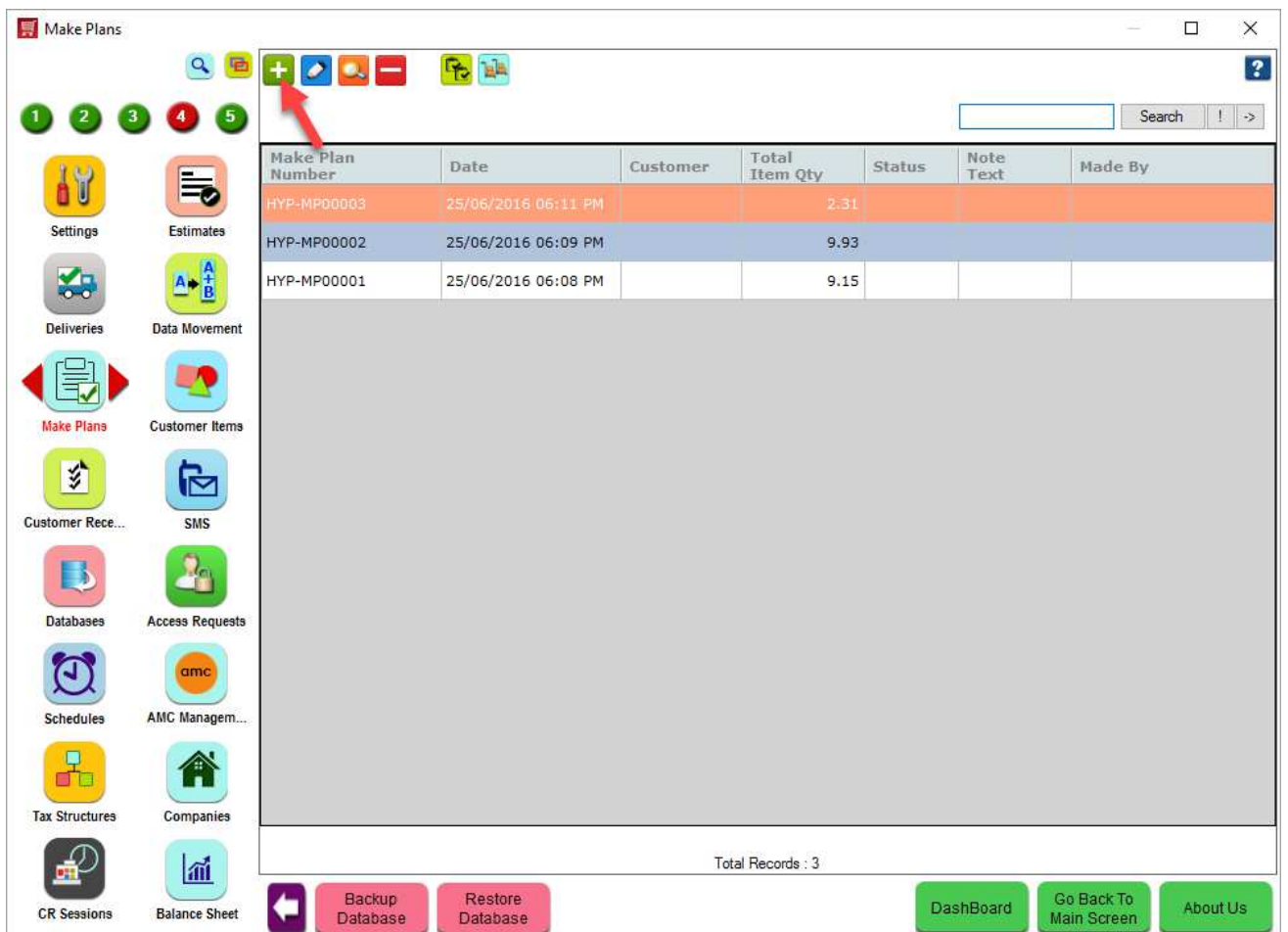
1. Run **HDPOS smart** and click on **Set-Up**.



2. From the 4th page of the **Set-Up**, click on **Make Plans**.







3. From **Make Plans** window, click on **Add New Make Plan**.



4. In **Add New Make Plan** window :

- Select the customer from whom you have received the order and select employee who is going to make the Item in **Made By** field.
- Select the item which is ordered by customer. You can add an item by entering the name of the product in **Item Name** field.
- The item will be listed in the item grid, enter the **Needed Quantity** which is basically the ordered quantity from the customer.
- HDPOS smart will calculate the **Make Quantity** that is required in order to complete the customer's order. Make Quantity is the difference between **Needed Quantity** and **Current Quantity**.
- Once you know the Make quantity, you can also check the stock of the raw materials or ingredients or BOM required in order to prepare the Item.
- To check the BOM quantity, click on **Show Raw Material Stock Available** toolstrip button.


Add New Make Plan

Select Business Location :
Hyper Drive Sweet Shop

Make Plan Number :
HYP-MP00004

Barcode :

Item Name :

Search Code :

Status :
Order Placed

Date :
06/06/2019
☐ Combine All Warehouse Stock

Select Warehouse :
Hyper Drive Sweet Shop

Customer :
Astitva Singh

Made By :
Parthav S

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Needed Quantity	Make Quantity
1	T00006	Coconut peda	Kg	2.00	10.00	8.00

Note: Here in the above screenshot, we have considered Coconut Peda as an Item which customer has ordered. Now, in order to prepare Coconut Peda, we also need to have the stock of its ingredients. To check the stock of the ingredients, click on **Show Raw Material Stock Available** toolstrip button.

5. In the **Make Plan Item Stock Details** window, all the BOM Items are listed with the **Current Quantity** (stock available), **Required Quantity** and **Short Quantity** (quantity need to be purchased to complete the order).

Make Plan Item Stock Details

Hyper Drive Sweet Shop
 Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103.
 080 42717700, +91-80-4271 7700
 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Select Warehouse : ☐ Combine All Warehouse Stock

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00038	Dry Coconut	Kg	3.00	5.00	2.00	80.00	400.00
2	T00034	Ghee	Kg	3.00	1.00	0.00	1,150.00	1,150.00
3	T00030	Milk	litre	2.00	5.00	3.00	42.00	210.00
4	T00024	Cashew nut	Kg	5.00	0.50	0.00	1,599.00	799.50
5	T00032	Almond	Kg	43.38	0.50	0.00	826.00	413.00

☒ Show purchase price for required stock
☐ Show purchase price for short stock

Raw Material Purchase Price : 2,972.50
Making Cost : 0.00
Total Cost Price : 2,972.50

6. In the **Make Plan Item Stock Details** window, in the bottom section there are two radio buttons :

- **Show purchase price for the required stock** - As the name suggests, this will show you the total purchase price of the BOM Items that are required in order to make the Item (Coconut Peda).

☒ Show purchase price for required stock
☐ Show purchase price for short stock


Raw Material Purchase Price : 2,972.50
Making Cost : 0.00
Total Cost Price : 2,972.50

- **Show purchase price for the short stock** - This will show you the total purchase price of the BOM Items that are short in quantity and has to be purchased.

☐ Show purchase price for required stock
☒ Show purchase price for short stock

Raw Material Purchase Price : 164.00
Making Cost : 0.00
Total Cost Price : 164.00

7. To create **Purchase Order** for the short Stock click on **Create PO**.



Hyper Drive Sweet Shop

Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103.
080 42717700, +91-80-4271 7700

Login : HDAdmin **Cash Register :** 01 - Manager's Drawer

Select Warehouse : ... ☐ Combine All Warehouse Stock

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00038	Dry Coconut	Kg	3.00	5.00	2.00	80.00	400.00
2	T00034	Ghee	Kg	3.00	1.00	0.00	1,150.00	1,150.00
3	T00030	Milk	litre	2.00	5.00	3.00	42.00	210.00
4	T00024	Cashew nut	Kg	5.00	0.50	0.00	1,599.00	799.50
5	T00032	Almond	Kg	43.38	0.50	0.00	826.00	413.00

☒ Show purchase price for required stock
☐ Show purchase price for short stock


Raw Material Purchase Price : 2,972.50

Making Cost : 0.00

Total Cost Price : 2,972.50

Cancel

8. To create **GRN** for the short Shock, click on **Create GRN**.



Hyper Drive Sweet Shop

Sit #167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103.
 080-42717700, +91-80-4271 7700

Login : HDAdmin **Cash Register :** 01 - Manager's Drawer

Select Warehouse : ...

☐ Combine All Warehouse Stock

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00038	Dry Coconut	Kg	3.00	5.00	2.00	80.00	400.00
2	T00034	Ghee	Kg	3.00	1.00	0.00	1,150.00	1,150.00
3	T00030	Milk	litre	2.00	5.00	3.00	42.00	210.00
4	T00024	Cashew nut	Kg	5.00	0.50	0.00	1,599.00	799.50
5	T00032	Almond	Kg	43.38	0.50	0.00	826.00	413.00

☒ Show purchase price for required stock
☐ Show purchase price for short stock


Raw Material Purchase Price : **2,972.50**

Making Cost : **0.00**

Total Cost Price : **2,972.50**

Cancel

9. You can even transfer the stock of the short quantity items from other warehouse, for that click on **Create Stock Transfer**.



Hyper Drive Sweet Shop

Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103.
080 42717700, +91-80-4271 7700

Login : HDAdmin **Cash Register :** 01 - Manager's Drawer

Select Warehouse : ... ☐ Combine All Warehouse Stock

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00038	Dry Coconut	Kg	3.00	5.00	2.00	80.00	400.00
2	T00034	Ghee	Kg	3.00	1.00	0.00	1,150.00	1,150.00
3	T00030	Milk	litre	2.00	5.00	3.00	42.00	210.00
4	T00024	Cashew nut	Kg	5.00	0.50	0.00	1,599.00	799.50
5	T00032	Almond	Kg	43.38	0.50	0.00	826.00	413.00

☒ Show purchase price for required stock
☐ Show purchase price for short stock


Raw Material Purchase Price : 2,972.50

Making Cost : 0.00

Total Cost Price : 2,972.50

Cancel

or make a request for stock transfer by clicking on **Create Stock Transfer Request** .



Hyper Drive Sweet Shop

Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103.
080 42717700, +91-80-4271 7700

Login : HDAdmin **Cash Register :** 01 - Manager's Drawer

Select Warehouse : ... ☐ Combine All Warehouse Stock

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00038	Dry Coconut	Kg	3.00	5.00	2.00	80.00	400.00
2	T00034	Ghee	Kg	3.00	1.00	0.00	1,150.00	1,150.00
3	T00030	Milk	litre	2.00	5.00	3.00	42.00	210.00
4	T00024	Cashew nut	Kg	5.00	0.50	0.00	1,599.00	799.50
5	T00032	Almond	Kg	43.38	0.50	0.00	826.00	413.00

☒ Show purchase price for required stock
☐ Show purchase price for short stock


Raw Material Purchase Price : **2,972.50**

Making Cost : **0.00**

Total Cost Price : **2,972.50**

Cancel

10. You can also export the short quantity items to an excel file by clicking on **Export Short Stock** toolbar button which can later be imported in GRN.



Hyper Drive Sweet Shop

Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103.
080 42717700, +91-80-4271 7700

Login : HDAdmin **Cash Register :** 01 - Manager's Drawer

Select Warehouse : ... ☐ Combine All Warehouse Stock

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00038	Dry Coconut	Kg	3.00	5.00	2.00	80.00	400.00
2	T00034	Ghee	Kg	3.00	1.00	0.00	1,150.00	1,150.00
3	T00030	Milk	litre	2.00	5.00	3.00	42.00	210.00
4	T00024	Cashew nut	Kg	5.00	0.50	0.00	1,599.00	799.50
5	T00032	Almond	Kg	43.38	0.50	0.00	826.00	413.00

☒ Show purchase price for required stock
☐ Show purchase price for short stock

Raw Material Purchase Price : **2,972.50**

Making Cost : **0.00**

Total Cost Price : **2,972.50**

Cancel

11. Click on **Cancel** to go back to **Add New Make Plan** window.

Hyper Drive Sweet Shop
 Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103.
 080 42717700, 91-80-4271 7700
 Login : HDAdmin Cash Register : 01 - Manager's Drawer

Select Warehouse :
☐ Combine All Warehouse Stock

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00038	Dry Coconut	Kg	3.00	5.00	2.00	80.00	400.00
2	T00034	Ghee	Kg	3.00	1.00	0.00	1,150.00	1,150.00
3	T00030	Milk	litre	2.00	5.00	3.00	42.00	210.00
4	T00024	Cashew nut	Kg	5.00	0.50	0.00	1,599.00	799.50
5	T00032	Almond	Kg	43.38	0.50	0.00	826.00	413.00

☒ Show purchase price for required stock
☐ Show purchase price for short stock

Raw Material Purchase Price : 2,972.50
Making Cost : 0.00
Total Cost Price : 2,972.50

Cancel

12. From **Add New Make plan** window, Click on **Save & Print** / **Save**.

Add New Make Plan

Select Business Location :
 Status :

Make Plan Number :
 Date :
☐ Combine All Warehouse Stock

Barcode :
 Select Warehouse :

Item Name :
 Customer :

Search Code :
 Made By :

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Needed Quantity	Make Quantity
1	T00006	Coconut peda	Kg	2.00	10.00	8.00

Pick Message

Save & Print (F5)

Save (F8)

Cancel

13. The document saved will be listed in the **Manage Make Plan** window.

The screenshot shows the 'Make Plans' application window. On the left is a sidebar with various icons and labels: Settings, Estimates, Deliveries, Data Movement, Make Plans (highlighted), Customer Items, Customer Rece..., SMS, Databases, Access Requests, Schedules, AMC Managem..., Tax Structures, Companies, CR Sessions, and Balance Sheet. The main area displays a table with the following data:

Make Plan Number	Date	Customer	Total Item Qty	Status	Note Text	Made By
HYP-MP00001	25/06/2016 06:08 PM		9.15			
HYP-MP00002	25/06/2016 06:09 PM		9.93			
HYP-MP00003	25/06/2016 06:11 PM		2.31			
HYP-MP00004	06/06/2019 03:06 PM	Astiva Singh	0.00			Parthav S

Below the table, it says 'Total Records : 4'. At the bottom of the window, there are buttons for 'Backup Database', 'Restore Database', 'DashBoard', 'Go Back To Main Screen', and 'About Us'.