

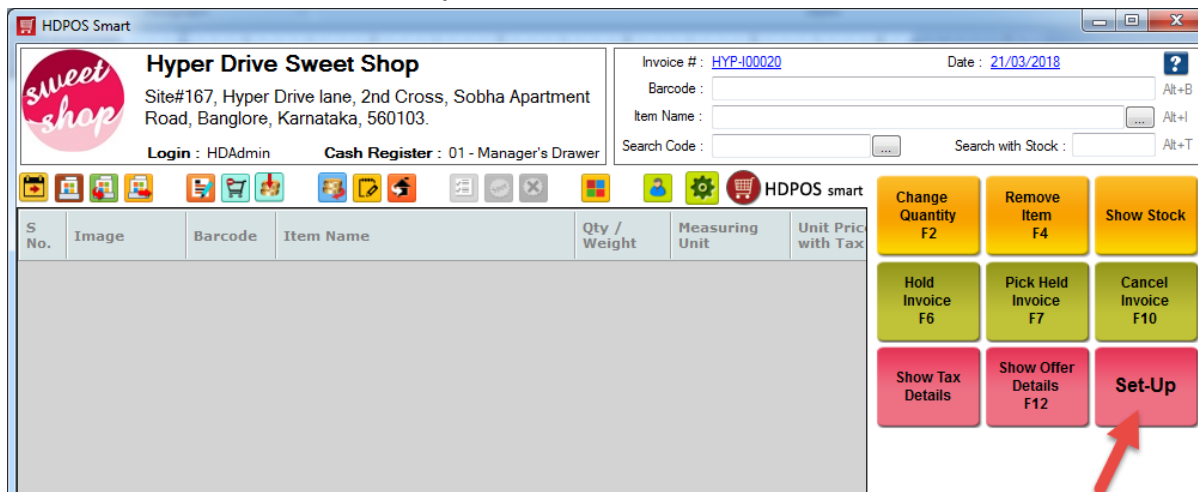
# How to create a Make Plan document in HDPOS smart?



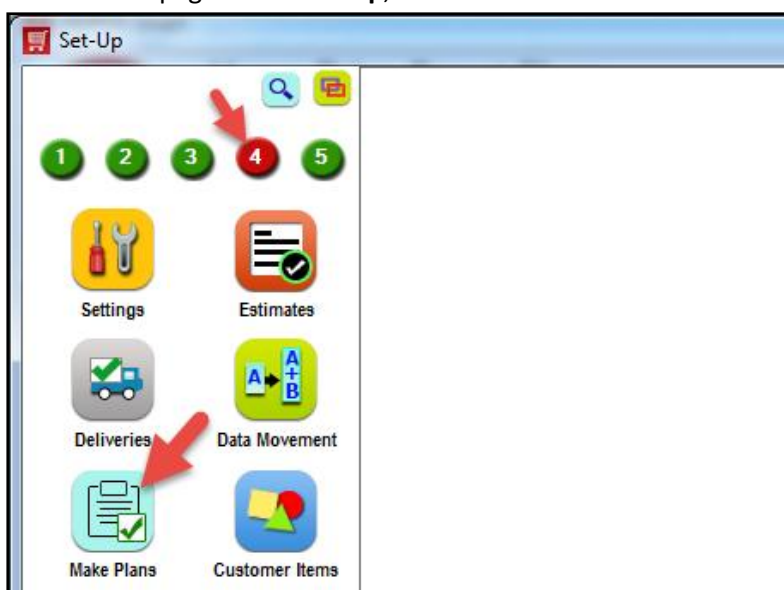
In HDPOS smart, we have a feature called **Make Plan** to handle the scenarios in which customer has ordered in bulk and you need to know how much quantity is available and how much do you need to complete the order. This type of scenarios often arises in businesses like Bakery Shops and Sweet Shops, 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 4<sup>th</sup> page of the **Set-Up**, click on **Make Plans**.



3. From Manage Make Plan, 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** toolbar button.

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Needed Quantity	Make Quantity
1	T00044	Blueberry Cheese Cake 500gm	Kg	2.00	10.00	8.00

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





- 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).

The screenshot shows a window titled 'Make Plan Item Stock Details' for 'Hyper Drive Sweet Shop'. The shop address is Site#167, Hyper Drive lane, 2nd Cross, Sobha Apartment Road, Bangalore, Karnataka, 560103. The phone number is 080 42717700, +91-80-4271 7700. The user is logged in as HDAdmin, and the cash register is 01 - Manager's Drawer. The 'Select Godown' dropdown is set to 'Hyper Drive Sweet Shop'. Below this is a table with the following data:

SNo.	Barcode	Item	Sales Measuring Unit	Current Quantity	Required Quantity	Short Quantity	Unit Purchase Price	TotalPurchase
1	T00045	graham cracker	cups	12.00	15.00	3.00	773.83	11,607.50
2	T00046	whipped Cream	cups	8.00	10.00	2.00	45.00	450.00
3	T00047	cream cheese	ounce	70.54	80.00	9.46	24.10	1,927.98
4	T00025	Sugar	Kg	49.75	2.50	0.00	62.00	155.00
5	T00048	blueberry syrup	cups	20.00	10.00	0.00	125.00	1,250.00

- 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 (Cake).

This screenshot shows the 'Show purchase price for required stock' radio button selected. To the right, a summary box displays the following values:

- Raw Material Purchase Price :** 15,390.48
- Making Cost :** 0.00
- Total Cost Price :** 15,390.48

- 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.

This screenshot shows the 'Show purchase price for short stock' radio button selected. To the right, a summary box displays the following values:


- Raw Material Purchase Price :** 2,639.48
- Making Cost :** 0.00
- Total Cost Price :** 2,639.48

- To create Purchase Order for the short Shock click on **Create PO**
- To create Receive item entry for the short Shock, click on **Create RIE**
- You can even transfer the stock of the short quantity items from other Godown, for that click on **Create Stock Transfer** or make a request for stock transfer by clicking on **Create Stock Transfer Request** .





10. You can also export the short quantity items to an excel file by clicking on Export Short Stock

toolstrip button  which can later be imported in Received Item Entry.

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

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

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

