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NetSuite Supply Planning Workbench: Triage Exceptions

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Executive Summary

The **NetSuite Supply Planning Workbench** is where a planner reads what the planning engine produced and decides what to do about it. Oracle's documented sequence is that the planner refreshes the planning repository, runs the plan, and then reviews action and exception messages in order to firm planned orders, release planned orders, create planned orders, and create new supply change orders (docs.oracle.com). Approval is separate: the planner goes to the supply change orders record to approve change orders (docs.oracle.com). This report converts that sequence into a repeatable exception-to-action playbook with named owners and approval controls, for a chief operating officer (COO), supply-chain director or planner who has completed a material requirements planning (MRP) rollout.

The operating point is that a planning message is a recommendation, not a completed action (versich.com). Infor M3 documentation, offered as a conceptual parallel from another vendor's ERP rather than NetSuite behavior, says action messages should be regarded as a signal to the planner (docs.infor.com), and the Association for Supply Chain Management (ASCM) lists reviewing and managing action messages as a defined planner competency (www.ascm.org). In NetSuite the rule has teeth: the planning engine cannot reschedule or cancel a firmed transaction (docs.oracle.com), so firming is a control decision rather than a convenience.

Input quality decides output quality. Reschedule In messages apply only to unapproved purchase orders and work orders that are outside the planning time fence (docs.oracle.com), so a late approved order needs a person, not a message. Time fences change what the engine will suggest, and ASCM notes that changes inside the planning time fence must be made manually by the master scheduler (learn.ascm.org). The stakes are visible in public data: US manufacturers held $976.0 billion of inventories in September 2026 (www.census.gov) at an inventories-to-shipments ratio of 1.46 (www.census.gov), while ASCM cites typical inventory accuracy targets of 95 to 99 percent (learn.ascm.org).

Four tools are provided: a pre-run checklist (Table 1), a message-to-owner-to-decision matrix (Table 2), an exception-aging escalation table (Table 3), and a hypothetical worked example with a late component, a moved demand date and a conflicting firmed order. Segregation of duties is the governing control: NIST's catalog says to define system access authorizations to support separation of duties (nvlpubs.nist.gov), and ISACA cautions that approvals given through informal channels may leave no evidence (www.isaca.org). All product statements reflect Oracle documentation read on 2026-11-17, not a live sandbox test, and the Implications section lists what to verify in a sandbox before sign-off.

Introduction and Background

Search interest in the exact phrase "netsuite supply planning workbench" is small, and the intent behind it is operational: a team has MRP running and needs to know what to do with the output. A definition of MRP does not answer that. The questions are narrower. Which messages need a purchase order, work order or transfer change, and which need corrected data? Who may release a planned order? What happens after an order is firmed? This report answers them for manufacturers and multi-site distributors, using Oracle's NetSuite Help Center as the authority for product behavior and independent sources for concepts, controls and statistics.

Scope and terminology

Oracle states that its Supply Planning (MRP) solution replaces Time-Phased Planning (docs.oracle.com). This matters when reading documentation: some pages on action messages, time fences and reschedule settings sit in the older Demand Planning book, while item-location planning fields sit in the Supply Planning pages. Where the two disagree, this report says so.

A **planned order** is an engine suggestion that exists only within the computer and may be changed or deleted on later runs (learn.ascm.org). A **firm planned order** is one the computer is not allowed to change automatically (learn.ascm.org). A **supply change order** carries a reschedule or cancel recommendation until someone approves it. ASCM defines an action message as output that identifies the need for, and the type of action to be taken to correct, a planning problem (learn.ascm.org), and lists the standard types as release order, reschedule in, reschedule out, and cancel (learn.ascm.org).

Who the playbook is for

The **planner** works the workbench daily. The **supply-chain director** owns exception policy, time fences and escalation thresholds. The **COO or controller** approves exposure above a value threshold and owns separation between those who plan and those who commit spend. NIST's catalog describes separation of duties as dividing mission or business functions and support functions among different individuals or roles (nvlpubs.nist.gov); Table 2 applies that idea to planning actions.

Evidence base and limits

Product facts come from Oracle's Help Center and NetSuite release articles read in November 2026. None of the Oracle pages reviewed shows a version or last-updated date, so "current" means current as of the 2026-11-17 access date. No sandbox was available. Permission names for the workbench, plan definitions and

change-order approval were not found in the pages reviewed, and that gap recurs in the sections on controls. Partner commentary appears only where labeled.

Pre-Run Checks: Repository, Horizon, Item Data and Demand Source

Most "bad plan" complaints trace to inputs. The planning repository stores planning information and lets planners control how often NetSuite updates planning inputs. That control is also a risk: any change in item setup, open orders or dates after the last refresh is invisible to the plan.

Repository freshness

A refresh can be scheduled overnight, as either a Complete Refresh that purges the repository and reloads item setup data or a Net Change that reloads only data changed since the last refresh, and the schedule can name a supply plan definition to launch after a successful refresh (docs.oracle.com). Chaining refresh and plan this way keeps the workbench from showing a plan built on yesterday's inputs. The refresh event log shows the initialization and refresh lines and should be read before any message is acted on.

Recent releases added related controls. NetSuite's 2025.2 article says the Plan Definition Saved Search can email recipients (www.netsuite.com), and an Oracle community preview of 2025.1 listed a Preferred Vendor Item Filter in the workbench (community.oracle.com). These are vendor-announced features, so verify availability in the account's release before building a procedure on them.

Horizon, scope, demand source and item data

The horizon is set on the supply plan definition, and the planning process considers only demand plans within it (docs.oracle.com). Demand source is chosen per location (demand plans, sales orders, or both), and a very long horizon across many item-locations should be tested at scale before go-live.

Planning math is item master math. MIT's manufacturing-systems notes list the item master file, with its bill of materials (BOM), lot sizing and planning lead times, as an MRP input (ocw.mit.edu). Inventory accuracy is the other half: ASCM says typical targets run 95 to 99 percent (learn.ascm.org) and that the key purpose of cycle counting is to identify items in error (learn.ascm.org). A retail study examined nearly 370,000 inventory records from 37 stores of one retailer (econpapers.repec.org) and found that stores audited twice a year had substantially lower errors (www.chicagobooth.edu). That is single-retailer evidence, not a manufacturing benchmark, but the direction matches the ASCM guidance.

Table 1 below consolidates the pre-run checks into a sign-off list.

Check	What to confirm	Owner	Evidence
Repository refresh	Last refresh finished without errors and post-dates the last material data change	Planner	Event log refresh lines
Plan launch	Plan definition launched after the refresh, not before	Planner	Schedule can launch a named definition after refresh

Check	What to confirm	Owner	Evidence
Horizon	Horizon covers the longest purchase and build lead time plus a review buffer, tested at data volume	Supply-chain director	Demand considered only within the horizon
Demand source	Each location uses the intended demand source type	Supply-chain director	Per-location demand source types
Time fences	Planning and demand time fences set; changes inside the planning fence are manual	Supply-chain director	ASCM definition (learn.ascm.org); one partner guide describes setting the number of days within which no new orders are planned (saloraerp.com); well-tuned fences eliminate noise so planners focus on exceptions that matter (www.cleverence.com)
Item and location data	Lead times, safety stock and lot sizing reviewed	Item master owner	Item master is an MRP input (ocw.mit.edu); lead-time variability can raise safety stock enough that a longer, stable lead time may be preferable (user.engineering.uiowa.edu)
Open orders	Purchase and work orders carry current dates	Buyer, scheduler	Reschedule In messages cover only unapproved orders
Inventory records	Cycle-count backlog on planned items is cleared	Inventory control	Cycle counting identifies items in error (learn.ascm.org)

The table is short on purpose. It makes the first question of the day "is the plan trustworthy?" rather than "what does the plan say?" Items failing a check should be held out of approval until corrected, and the owner column keeps data fixes out of the planner's queue when the planner cannot change the source record.

With the table complete, the planner's first hour follows a fixed order:

- **Check the refresh log** for the last completed refresh and any errors.
- **Confirm the plan ran after the refresh** and note its launch time.
- **Review the held-out list** of items failing Table 1 checks.
- **Open the High Impact Late Demand items first**, then the rest.

Reading the Workbench: Action Messages, Exceptions and Pegging

Results open from a plan definition's View Results link in the Planning Workbench column (www.paapri.com), and the top panel shows the plan definition name and related details (www.paapri.com). Messages can be filtered by Action, Exception, Supply or Demand Type. This is the "MRP planning workbench" in everyday language; the formal NetSuite name is the Supply Planning Workbench.

Action versus exception messages

Action messages propose something expressible as a change to a transaction. **Exception messages** describe challenges the plan estimates no action on existing orders will solve. Oracle lists all such challenges on a display-only Exceptions tab, with an example reading "Insufficient lead time for proposed Planned Purchase Order" followed by a day count (docs.oracle.com). MIT's notes likewise list exception reports among standard MRP outputs (ocw.mit.edu). Because the tab is display only, nothing is submitted from it; the response is a human decision about supplier, schedule, transfer or customer commitment. The Action tab, by contrast, supports Perform Selected Action and Perform All Actions, and the outputs remain recommendations. As a conceptual parallel from another vendor's ERP (not NetSuite behavior), Infor M3 documentation says action messages should be regarded as a signal to the planner (docs.infor.com).

Older Oracle pages list message types such as Quantity On Hand is Below Safety Stock and a Late Purchase Order message for purchase orders not fully received before the start date. Those pages sit under the legacy Demand Planning book, so treat them as reference vocabulary and confirm the labels shown in the account's workbench. ASCM's standard action types, which NetSuite splits across an Action tab and an Exceptions tab, are release order, reschedule in, reschedule out, and cancel (learn.ascm.org).

Reschedule In, Reschedule Out and Cancel

Reschedule In messages are available only for unapproved purchase orders and work orders that are outside the planning time fence (docs.oracle.com). The documented Reschedule In day limits differ between pages. The Demand Planning page says to enter a number between one and 360 for the maximum days (docs.oracle.com), while the Supply Planning item-location page gives one to 90 for Reschedule in Days (docs.oracle.com). The same page gives one to 180 for the separate Reschedule out Days field, and the Demand Planning page does not give a Reschedule Out range to compare. Read the limit on the item record in the account rather than relying on either page.

Cancel deserves extra caution. In a Planning Workbench View, the cancel action type shows non-firm planned orders that can be canceled due to excess supply or lack of demand. A partner commentary says cancellation is not automatically correct (versich.com), which is sound policy: apparent excess supply may reflect a demand record not yet entered.

Pegging and time fences

Pegging answers "why does this order exist?" Oracle says users cannot create pegging associations, only review them, and that with Supply Allocation enabled, pegging uses allocations first (docs.oracle.com). Pegging can be switched off to cut processing time, but triage without pegging means working blind.

Within the demand time fence NetSuite always uses actual orders rather than forecast, and within the planning time fence the planning system will not create planned orders (docs.oracle.com). ASCM adds that changes inside that fence are made manually by the master scheduler (learn.ascm.org). Training material should use Oracle's names for the fences.

Decision Matrix: From Message to Owner to Decision

The core artifact maps each message family to the owner of the decision, a default response and the control that applies. It is a proposed operating model built on documented behavior, not an Oracle-published matrix. *Table 2* below lists the principal families.

Message or condition	What it means	Owner	Default decision	Control before acting
Reschedule In	Move an unapproved purchase or work order outside the planning time fence earlier	Buyer or scheduler	Accept if supplier or shop confirms the date; otherwise check lead time data	Check pegging to the demand served
Reschedule Out	Move an order later	Buyer or scheduler	Accept when demand is confirmed moved; reject if demand may be incomplete	Confirm the Demand tab shows the change
Cancel	Non-firm planned order not needed	Planner; director above a value threshold	Investigate first, cancel after a demand check	Second approver, a two-person control concept (nvlpubs.nist.gov)
Release	Planned order nears its lead time; release creates the real order	Planner	Release inside policy; escalate outside it	Approval of the resulting order (versich.com)
Late purchase order	Order not fully received before start date	Buyer	Expedite, split or source elsewhere	Supplier confirmation recorded on the order
Insufficient lead time (exception)	Proposed planned order cannot meet its date	Planner with director	Transfer, expedite, partial ship or move the demand date	Decision logged outside the display-only tab
High Impact Late Demand Alert	Severe late demand that can still be addressed	Supply-chain director	Escalate the same day	Customer-date change needs sales approval
Action on a firmed order	Suggested action not available for submission (docs.oracle.com)	Planner	Change the order manually	Same approval as a new order
Below safety stock	On-hand below safety stock level	Planner	Review parameter and demand pattern before expediting	Safety stock protects against quantity uncertainties (ocw.mit.edu) and depends on lead-time uncertainty (www.kellogg.northwestern.edu), so review is an item master task

Three principles follow:

- **Route by decision, not by message.** An "Insufficient lead time" exception and a "Late purchase order" message may share a root cause, a supplier slip, and an owner.

- **Treat unsolvable exceptions as input problems.** An exception no action can solve is a prompt to change an input or a commitment, not something to dismiss.
- **Scrutinize cancel most.** Cancel removes supply, so it carries the highest approval bar.

Supply allocation vs supply planning

The two features are often confused. Oracle says Supply Allocation matches inventory supply sources to demand sources (docs.oracle.com). Supply Planning, by contrast, generates planned orders, planning messages and pegging data. Practically, allocation answers "which existing supply is promised to which demand," while the workbench answers "what new supply or schedule change is needed." Allocation affects the workbench through pegging, and a firm allocation on a supply order stops the planning process from rescheduling or canceling it, so allocation policy is a hidden input to message volume.

Demand planning and supply planning

Demand Planning produces the expected demand; Supply Planning turns demand and supply into recommendations. Oracle says a supply plan can be generated from a demand plan using the Calculate Supply Plan page (docs.oracle.com). NetSuite's product pages say supply planning capabilities are included in the NetSuite Demand Planning module (www.netsuite.com) and that MRP is part of it (www.netsuite.com); these are vendor packaging claims. For the workbench, forecast quality sets the baseline from which exceptions arise, and the demand time fence controls when forecast gives way to actual orders.

Release, Firm and Approve: Controls on Plan Recommendations

Firm, release and implement

Firming protects a planned order from the next run. Oracle says firm planned orders are not deleted or rescheduled and count in netting, while non-firmed planned orders are deleted when the process runs. The reverse path is narrow: a planned order generated from a supply plan cannot be un-firmed (docs.oracle.com). A firmed order no longer needed must be deleted, so firming commits the planner's attention. ASCM states the principle directly: a firm planned order can be frozen in quantity and time (learn.ascm.org). Because firming commits the planner's attention, the NetSuite practice described here keeps firming a deliberate planner action.

How to release planned orders in NetSuite. On the Supply tab, check the orders and click Release Selected Orders (docs.oracle.com). Planned purchase orders are then implemented on the Order Items page. For work orders, both creation preferences default to Do Not Generate; releasing an eligible planned work order creates a work order in Released status under the release option. After NetSuite creates work orders, a Planning Repository Refresh and a rerun of the plan are needed before they appear in the workbench.

Approving supply change orders

Performing an action on the Action tab creates a supply change order, and Oracle says change orders need to be approved for the suggested changes to be implemented (docs.oracle.com). For released actions the system may require a secondary level of approval (docs.oracle.com). This gives a natural two-step control,

with one role creating the change order and another approving it, consistent with NIST's requirement to define system access authorizations to support separation of duties (nvlpubs.nist.gov). NIST's configuration-change control calls for reviewing proposed changes and approving or disapproving them (nvlpubs.nist.gov). Where a small team cannot separate roles, a university internal-control reference says management selects and develops alternative control activities (finance.arizona.edu), such as independent after-the-fact review of every release above a threshold. The approval itself should sit on the record in NetSuite, because approvals given by instant messaging may leave no evidence (www.isaca.org).

Two limits apply. The Oracle pages reviewed do not name the roles or permissions required for the workbench or change-order approval, so role design must be tested in a sandbox. They also do not document an export from the workbench itself. What they do document is a Planning Workbench View that can embed an item saved search and preset filters, and a SuiteAnalytics Supply Chain Planning Engine Workbook for reviewing planning messages, recommended actions, quantities and dates.

Guarding against bulk acceptance

A partner guide describes bulk approval or individual review as planner options (netsuite.folio3.com). Bulk acceptance suits a defined low-risk message class and nothing else. A workable policy has three parts:

- **Allowed in bulk:** Reschedule Out on low-value, multi-source items, after the demand check.
- **Never in bulk:** Cancel, and any action on high-value or single-source items.
- **Always logged:** the batch, the approver and the reason, recorded in NetSuite rather than in chat.

The broader rationale follows. A NetSuite partner makes a similar point: automated workflows should not create uncontrolled purchasing, production, or transfer actions (versich.com), and an approval checkpoint should be retained for high-risk or financially significant changes (versich.com).

After-Run Reconciliation and Daily and Weekly Governance

After-run reconciliation

A short daily reconciliation closes the loop, in five steps:

1. **Confirm the batch.** Open the event log through the Status link and check the action batch processed.
2. **Confirm approvals.** Check change orders are approved and, for work orders, that the change-order status reflects the approval.
3. **Verify transactions.** Check the real purchase, work or transfer order exists for each release.
4. **Refresh and rerun.** Repeat the repository refresh and plan so the new orders appear.
5. **Explain differences.** Investigate any gap between approved and resulting quantity.

The documented mechanics behind these steps follow. Open the event log through the Status link to confirm the action batch processed. Confirm change orders are approved and, for work orders, check the resulting change-order status in the account. For released planned orders, verify that the real purchase, work or transfer order exists. Then refresh and rerun so new orders appear in the plan. A gap between approved and resulting quantity is a setup issue, so check lot sizing and minimum order quantity on the item.

Some features may reduce manual work. NetSuite's 2025.2 article describes a field to exclude transfer orders from supply planning (www.netsuite.com) and an Override Lead Time field for transfer order receipt dates (www.netsuite.com). Oracle's 2026.2 notes add two pegging analysis workbooks for Supply Planning, which NetSuite's own announcement also describes (www.netsuite.com). These are vendor-described capabilities; confirm the release in the account.

Controlling message volume

A nervous plan floods planners with changes. ASCM defines MRP nervousness as small upstream changes causing significant timing or quantity changes in lower-level schedules (learn.ascm.org), and MIT's notes say nervousness results when a deterministic calculation is applied to a random system (ocw.mit.edu). A user-group whitepaper describes a nervous MRP system as one that presents continual action messages (questoraclecommunity.org). Simulation work in Management Science found that safety stock and lot-for-lot approaches were not cost effective against rolling-horizon nervousness in the tested settings (ideas.repec.org), so adding safety stock is not a cure. The practical levers are time fences, which when well tuned eliminate noise so planners focus on exceptions that matter (www.cleverence.com), and a limit on how many rules generate exceptions, since applying every rule imaginable could result in too much work (arkieva.com). Rescheduling also has real costs on the shop floor and with suppliers (www.cleverence.com), so a Reschedule In should not be accepted merely because it exists.

Exception aging and escalation

Unresolved exceptions are the best leading indicator of plan decay. *Table 3* below proposes an aging policy. The **thresholds are a hypothetical starting point**, not an Oracle or ASCM standard, and should be tuned to the longest lead time in the plan.

Age of unresolved exception	Status	Escalation owner	Required action
0 to 1 business day	New	Planner	Classify as data, supplier, demand or capacity; assign owner
2 to 3 business days	Aging	Supply-chain director	Decision recorded: act, accept risk, or fix input
4 to 7 business days	Overdue	Director with sales or procurement lead	Customer or supplier communication; revised date logged
Over 7 business days, or inside the lead-time threshold	Critical	COO or controller	Exposure review; approve expedite, alternate source or customer date change

The Critical row mirrors an ASCM rule that master-schedule changes inside a demand time fence must be approved by an authority higher than the master scheduler (learn.ascm.org). Old exceptions should be closed with a reason code, never hidden because of age; a planner who marks a message done prematurely creates false control. The weekly review should track the count and value of Critical items, firmed planned orders no longer needed, and the share of reschedule recommendations accepted versus rejected, since a persistently high rejection rate points to bad lead-time data.

Daily and weekly cadence

- **Daily, planner:** confirm refresh and plan completed (a saved-search email alert on a failed run, where available in the release), read High Impact Late Demand Alert items, work the low-risk Action classes, record exception decisions.
- **Daily, approver:** clear the supply change order queue, checking value, supplier and pegging above threshold.
- **Weekly, director:** review aging, firmed-order backlog, rejected recommendations by cause, and safety stock changes.
- **Monthly, COO or controller:** review approval logs, segregation of duties exceptions and plan accuracy.

Case Studies and Real-World Examples

Worked Example (Hypothetical Example): late component, moved demand date, conflicting firmed order

This example uses invented items, dates and quantities. It is not drawn from any real company or NetSuite account. The plan runs on **Monday, December 7, 2026**.

Setup. An assembly, PH-100, takes a 3-day work order. Each unit needs one component, CMP-220, with a 14-day vendor lead time. The planning time fence is 7 days, ending December 14. Table 1 checks have passed.

Event 1, the demand date moves. A sales order for 400 units of PH-100 moves from December 28 to December 21. Subtracting the 3-day build gives a work order start of December 18, so 400 units of CMP-220 are needed by December 18, seven days earlier than the previous December 25 requirement. The planner confirms the new date on the Demand tab before acting.

Event 2, a late component. On hand are 150 units. An approved purchase order for 250 units was due December 16, which covered the 400 needed (150 plus 250). The vendor now confirms December 24, 6 days after the need. Because the order is approved, a Reschedule In message cannot apply to it, so expediting requires a conversation with the supplier.

Event 3, a conflicting firmed order. An earlier planner firmed a planned purchase order for 100 units with a December 30 receipt as a buffer. Supply by December 30 totals 500 against a need of 400, a surplus of 100. By ASCM's definition the computer is not allowed to change a firm planned order automatically (learn.ascm.org), so any suggested action on it must be handled by a person, and a firmed order that is no longer needed has to be deleted.

Calculation. The shortage at December 18 is 400 minus 150, or 250 units. A new planned order to cover it must be placed by December 18 minus 14 days, which is December 4. The plan runs December 7, so the order is 3 days late, and the workbench would raise an "Insufficient lead time" exception with a 3-day gap.

Triage using Table 2.

1. **Classify.** One exception (insufficient lead time) plus one late purchase order. Both are supplier-driven, and the exception cannot be submitted from its display-only tab.

2. **Investigate data.** Check pegging for the demand behind the 400 requirement and confirm the sales order change is final. If the customer date is firm, the gap is 6 days on the existing order and 3 days on any new one.
3. **Decide.** The director weighs three options: expedite the approved purchase order by 6 days; transfer 250 units from another site with an assumed 4-day transfer lead time, arriving December 11 if ordered December 7; or ask sales to move the build to December 27.
4. **Approve.** Because the commitment crosses the example's single-source threshold, the controller approves the transfer, and any date-change supply change order is approved on its own record.
5. **Clean up the firmed order.** Keep the 100-unit buffer until the expedited receipt is confirmed, then delete it under the same approval as a cancel.
6. **Reconcile.** After refresh and rerun, confirm the CMP-220 exception count dropped and no new Late Purchase Order message appeared; repeated supplier slips are a prompt to review lead-time data, since lead-time uncertainty drives safety stock (www.kellogg.northwestern.edu).

The same item produced three signals with three owners: sales for the date, the buyer for the supplier, and the planner for the firmed order. Without the matrix, one planner would likely try to resolve all three alone.

Data Analysis and Evidence

No independent public benchmark of planner exception volume or acceptance rates for NetSuite was found. What can be quantified is the stakes, the tool's documented limits and the accuracy of inputs.

Inventory stakes. The Census Bureau's M3 report for September 2026 put manufacturers' inventories at $976.0 billion, up 0.4 percent for the month (www.census.gov), against shipments of $668.5 billion, up 1.3 percent (www.census.gov). The inventories-to-shipments ratio was 1.46, down from 1.47 in August (www.census.gov). Work in process rose 0.5 percent in durable goods and 2.2 percent in nondurable goods (www.census.gov), so exposure extends past finished goods. Across manufacturing and trade, inventories were $2,873.4 billion at the end of September 2026 (www.census.gov), and the total business inventories-to-sales ratio was 1.33 against 1.42 a year earlier (www.census.gov). The figures are seasonally adjusted, preliminary and subject to revision.

Input accuracy. ASCM cites 95 to 99 percent as typical inventory accuracy targets (learn.ascm.org). Lead-time data carries similar sensitivity: safety stock is a function of the cycle service level, demand uncertainty, replenishment lead time and lead-time uncertainty (www.kellogg.northwestern.edu), and lecture notes observe that a longer lead time with no variability might require less safety stock (user.engineering.uiowa.edu). A published working paper adds that conclusions from the normal approximation can be flawed in the service-level range where many firms operate (www.kellogg.northwestern.edu), so a formula is no substitute for reviewing lead-time history.

Tool limits. The documented Reschedule In day limit differs between Oracle pages (360 versus 90), as noted earlier, and horizon and item-location volume should be tested before go-live. Neither the limits nor the volume behavior can be inferred from public benchmarks, so a sandbox test is the evidence to collect.

Amplification. Published bullwhip research shows the variance of orders may be larger than that of sales (econpapers.repec.org), and ASCM describes the effect as generated by a small change in demand downstream in the supply chain (learn.ascm.org). Noise at the planning layer can feed the same dynamic if every Reschedule In is accepted without a demand check.

Proposed scorecard measures, computed from the aging data in Table 3, are listed below. These are proposals, not published benchmarks; calibrate them against a baseline of four to eight weeks.

- **Aging:** exceptions open more than 3 business days.
- **Acceptance:** percent of recommendations accepted versus rejected.
- **Firm backlog:** firmed planned orders not pegged to demand.
- **Control:** releases above threshold without a second approver.

Implications and Future Directions

Operationalize before automating. NetSuite's 2025.2 and 2026.2 releases added saved-search email alerts, a transfer-order exclusion field, an override lead time field and pegging analysis workbooks, as covered earlier. Each adds output someone must own, and the cost of acting on the wrong output is not trivial when manufacturers' inventories stand at $976.0 billion (www.census.gov) with an inventories-to-shipments ratio of 1.46 (www.census.gov). A team with the Table 2 ownership model can absorb new signals; a team without one will simply have more unread messages.

Replace legacy assumptions. With Supply Planning replacing Time-Phased Planning, procedures copied from older material (message codes, reschedule ranges, time fence terminology) should be reverified against the account.

Verify in a sandbox before sign-off. The documentation reviewed leaves four operational questions open, and each should be tested in a non-production copy with the result written into the approval procedure:

- **Permissions:** which roles allow refresh, release and change-order approval.
- **Approval routing:** whether a released purchase order enters an approval route.
- **Export:** whether workbench output can be exported beyond saved searches and SuiteAnalytics workbooks.
- **Labels:** the exact message labels in the account's release.

Treat configuration, data and workflow as the levers. When a plan looks wrong, the productive questions concern horizon, demand source, time fences, lead times, lot sizing, firming practice and refresh timing. These are business-controlled choices, and they are where implementation partners are typically engaged. The controls here are platform-neutral enough for an internal team or any partner to run.

Governance as a standing practice. The more automated the planning environment, the more valuable a human decision with a recorded reason becomes between a recommendation and a commitment, and the Critical row of Table 3 is where that decision belongs.

Frequently Asked Questions (FAQs)

What is the difference between an action message and an exception message in NetSuite?

An action message proposes a change that can be performed from the Action tab, while an exception is listed on the display-only Exceptions tab. Actions create supply change orders that need approval; exceptions need a human decision about inputs or commitments. Infor M3, a different vendor's ERP, takes a similar view in its documentation of action messages as a signal to the planner (docs.infor.com), and MIT's notes list exception reports among standard MRP outputs (ocw.mit.edu).

How to release planned orders in NetSuite?

Check the planned orders on the Supply tab and click Release Selected Orders. Implement purchase orders on the Order Items page, and follow the work order creation preference for work orders. Refresh and rerun the plan to see new work orders. A released planned order becomes a real transaction, so apply the same approval as a manually created one, recorded in the system rather than in chat (www.isaca.org).

What do Reschedule In, Reschedule Out and Cancel do?

Reschedule In moves a supply order earlier, and Oracle documents it only for unapproved purchase orders and work orders outside the planning time fence; Reschedule Out moves it later. Cancel proposes removing a non-firm planned order. ASCM's dictionary lists the same action types (learn.ascm.org).

Why does a suggested action become unavailable?

For firmed supplies, suggested actions still show in NetSuite but cannot be submitted, so the change has to be made manually. One NetSuite partner guide describes the planning time fence as the window within which no new orders will be planned (saloraerp.com).

Does releasing a planned order require approval?

Oracle says the system may require a secondary level of approval for released actions. Whether a purchase order created from release enters an approval route depends on the account's routing, which the pages reviewed did not state, so verify it in a sandbox. NIST's configuration-change control calls for reviewing proposed changes and approving or disapproving them (nvlpubs.nist.gov). Bulk release without a preview is the main risk to guard against, so require a preview step before any bulk release.

How do Demand Planning and Supply Planning fit together?

A demand plan shows expected future demand, and a supply plan can be generated from it. NetSuite's product pages describe supply planning capabilities as included in the Demand Planning module (www.netsuite.com) and MRP as part of it (www.netsuite.com).

Conclusion

The Supply Planning Workbench produces recommendations, and operational quality depends on how they are triaged, approved and reconciled. The documented mechanics support a repeatable playbook: refresh and plan on a schedule, check inputs before reading messages, separate action messages from exceptions, route each message family to a named owner, keep firming and canceling under tighter control than rescheduling, approve supply change orders on the record, and reconcile after every run.

Three points carry the most weight. Firmed orders sit outside the engine's reach, so firming should be deliberate. Reschedule In messages cover only unapproved purchase and work orders outside the planning time fence, so late approved orders need people rather than messages. And exceptions no action can fix are signals to correct an input or renegotiate a commitment. The checklist, matrix and aging table give a planner, a director and a COO a common vocabulary for those choices, and the sandbox checks listed above close the remaining documentation gaps before the procedure is signed off.

Source links

Links cited in this article, in order of first appearance. Full addresses are provided for readers using extracted text.

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