Order Fulfillment Worksheet Battle Card

For Microsoft Partners who sell Insight Works apps

Order Fulfillment Worksheet answers one question in Microsoft Dynamics 365 Business Central: what can we ship today? It allocates available stock across sales and transfer orders, then creates the warehouse shipments and picks, on request or on a schedule.

WHO TO CALL ON

Companies on Business Central that ship sales and transfer orders from stocked locations, with or without warehouse documents.

Users include warehouse supervisors who release picks and shipments through the day.

AT A GLANCE

Business Central	Online and on-premises
Licensing	Per company, subscription
User license	Full user license, Essentials or Premium
Languages	English
Availability	All countries where Business Central is available

What changes when you add Order Fulfillment Worksheet to Business Central

	Business Central without Order Fulfillment Worksheet	Business Central with Order Fulfillment Worksheet
Stock availability	Checking one order at a time means shortages are found on the floor. Two orders can both look shippable with one unit on the shelf.	Inventory is allocated down the list, so each unit counts once. Each order shows Available, Partially Available, Not Available, or needing a move first.
Shipments and picks	Creating warehouse shipments and picks one order at a time takes up the morning. Every manual step is another chance to pick the wrong order.	Create warehouse shipments, warehouse picks, or inventory picks for selected orders in one action. Picks group by zone, bin, or due date.
Scheduled release	A supervisor who opens a screen every half hour to release work becomes the bottleneck. On busy days, orders wait.	Pick and shipment creation run as reports from the Business Central job queue, each entry with its own schedule and filters.
Moves and reservations	Bulk stock makes an order look short when it only needs a move. A ship-complete order can lose stock to the next order.	The worksheet separates quantity available to pick from quantity available to move. Auto Reserve creates standard Business Central reservations, so ship-complete orders keep their stock.

Selling points

Each unit counts once.
Inventory is allocated down the list in the order you set, deducting as it goes.

Shipments and picks in one action.
Create warehouse shipments, warehouse picks, or inventory picks, grouped by zone, bin, or due date.

Moves and reservations.
Create warehouse movements linked to the order, and use Auto Reserve to hold stock for ship-complete orders.

Split Allocation for short stock.
Split Allocation spreads limited stock evenly across the displayed orders instead of filling them top down.

Runs from the job queue.
Pick and shipment creation run on their own schedules and filters, without opening the page.

Licensed per company, not per user.
One subscription license per company, with full user licenses on Business Central Essentials or Premium.

Qualify the opportunity

1. Are you on Business Central today, or another ERP system?
2. How do you decide which orders can ship today?
3. Do pickers find shortages on the floor that your system did not show?
4. How do you prioritize orders, and how often does that order change?
5. How do you handle backorders, partial shipments, and ship-complete orders?
6. How do you allocate limited stock across orders?
7. How do you create shipments and picks today, and would a schedule help?
8. Do you keep bulk stock that must move to a pick bin?
9. Do your locations use directed put-away and pick, or basic warehousing?
10. Will you run Business Central online or on-premises?

Common questions

Does it run on Business Central online?
Yes. Order Fulfillment Worksheet runs on Business Central online and on-premises.

What Business Central license is needed?
It works with full user licenses on the Business Central Essentials and Premium tiers.

Does it work with reservations?
Yes, Auto Reserve creates standard Business Central reservations. The reservation actions need Business Central version 16 or later.

Does it cover transfer orders?
Yes. It reads every sales and transfer order for a location.

How is it licensed?
A subscription with one license per company, not per user.

Which warehouse setups does it support?
Locations with directed put-away and pick, basic warehousing, or no warehouse documents. Picks are created as warehouse picks or inventory picks to match.

Can it run without someone opening the page?
Yes. Pick and shipment creation run as reports from the Business Central job queue, with their own schedules and filters.

Resources

Sales kit: insight-works.com/partner-hub/order-fulfillment-worksheet

App page and demo: insight-works.com/apps/order-fulfillment-worksheet

Datasheet: Order Fulfillment Worksheet datasheet (PDF)

Partner hub: insight-works.com/partner-hub

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For a pre-sales meeting, a demo, or implementation guidance, send a message at insight-works.com/partner-hub/contact.

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