INSIGHT WORKS

ORDER FULFILLMENT WORKSHEET

for Microsoft Dynamics 365 Business Central

★★★★★ **4.4 on Microsoft Marketplace** · **Over 1,000 Installs**



OPTIMIZE YOUR ORDER FULFILLMENT PROCESS BY FOCUSING ON IN-STOCK ORDERS.

An on-demand answer to what can ship today, and the warehouse shipments and picks to act on it, created from the worksheet or on a schedule.

Order Fulfillment Worksheet is an Insight Works app for Business Central that starts each day with one question: what can we ship today? It reads every sales and transfer order for a location, works out how much of each can be fulfilled from current stock, and allocates inventory down the list so the same unit is never promised to two orders. It then creates the warehouse shipments, picks, or inventory picks to act on that answer. The availability picture is calculated on demand, when someone presses Recalculate or when the job queue does it for them.

Why it holds up

Allocation, not just availability. Inventory is deducted as the worksheet works down the list. If one unit is in stock and two orders need it, only the first gets it, so a picker is not sent after stock that is not there.

Documents created from the same screen. Create warehouse shipments, warehouse picks, or inventory picks for the orders you select, or stage them in the pick or movement worksheet to review first.

Runs without anyone opening it. Pick creation and warehouse shipment creation each run as a report through the Business Central job queue, with their own schedule and filter on each entry.

Sort and filter decide who gets stock first. Allocation follows the order of the list. The default sort is Planned Shipment Date, so overdue orders take first claim on stock as it arrives.

Fair shares when stock is short. Recalculate allocates top down. Split Allocation spreads the available quantity evenly across the displayed orders, so two stores ordering 100 each against 50 on hand each get 25.

Works with the warehouse setup you have. Picks are created as warehouse picks or inventory picks depending on the location, and the app works with both Essential and Premium Business Central user licenses.

Who's on it

Warehouse & shipping managers

See what is shippable today and create the picks and shipments, or schedule the job and stop opening the worksheet.

Order fulfillment specialists

Sort to set priority, run Split Allocation, and reserve stock for orders that must ship complete.

Inventory controllers

See where stock is committed, which orders are short, and what needs a move first.

Logistics coordinators

Filter by shipping agent to work a carrier cutoff.

Business Central partners & consultants

Configure setup options, custom views, and job queue entries for the customer's locations.

Free to install and evaluate. Order Fulfillment Worksheet installs at no cost from Microsoft Marketplace, so you can try it in a sandbox before committing to production.

Backed by over 800 resellers. Insight Works works through a global network of more than 800 Business Central resellers who can help consult, implement, and support a deployment. **See the Insight Works reseller directory**.

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WORKSHEET & ALLOCATION

- Lists all sales and transfer orders for a selected location, separately filterable by document type
- **Recalculate:** greedy top-down allocation over the displayed orders
- **Split Allocation:** even distribution across all displayed orders
- **Reload Orders** re-reads new, changed, and deleted orders, then recalculates
- Availability changes only when one of these runs; filtering or sorting does not change it

AVAILABILITY & QUANTITIES

- Seven Availability values, including Available with Move Required, Partially Available, Pick Created, and Picked
- Line-level Allocation Status (blank, Partial, Full) and a Reservation Status field
- Qty. Available to Pick for stock in pickable bins; Qty. Available to Move for stock that must be moved first
- Setup options exclude expired inventory and include or exclude inventory in blocked movement bins

CREATING DOCUMENTS

- Create Shipment(s) for warehouse shipments, with a Combine Shipments setting of Prompt or Always
- Create Pick(s) as warehouse or inventory picks; set a maximum number of lines per pick and group by zones, bins, or due dates
- Warehouse movements created from the worksheet, linked back to the originating order
- Send to Pick Worksheet, or Send to Movement Worksheet at directed locations, to stage lines for review

JOB QUEUE AUTOMATION

- Pick creation runs as a scheduled report; a second report schedules warehouse shipment creation
- Each job queue entry has its own schedule and filter, for example every 30 minutes on weekdays, or once at 4:00 p.m. for one carrier

VIEWS, FILTERS & RESERVATIONS

- Custom views with multi-column sorting and a default view; saved advanced line filters for sales and transfer lines
- Auto Reserve at line or order level creates standard Business Central reservations, so a ship-complete order can hold its partial quantity
- Shipment date adjustment from the worksheet; an Order Lines page
- Assemble-to-order support: the finished good's allocation is derived from allocated components

BUSINESS CENTRAL LICENSING

- Free to install and evaluate from Microsoft Marketplace; most environments start in a sandbox for configuration before go-live
- Subscription, one license per company, not per user
- Works with Business Central Essential and Premium user licenses
- Microsoft licensing is separate and still required

INTEGRATION & INSTALLATION

- Installs from Microsoft Marketplace like any other Business Central extension; the install guide in the knowledge base covers installation and configuration
- Creates standard Business Central documents: warehouse shipments, picks, inventory picks, pick worksheet lines, and warehouse movements
- Published events allow extension, for example for proportional or priority-weighted allocation

PREREQUISITES & COMPATIBILITY

- Business Central online or on-premises, in English, wherever Business Central is available
- Reservation actions require Business Central 16 or newer
- Picks are limited to the allocated quantity, so partially picked orders are a normal outcome
- Assemble-to-order: no nested assemblies and no partial assemble-to-order lines

SUPPORT & RESOURCES

- Knowledge base at kb.dmsiworks.com with its own section: install guide, user guide, release notes, and support topics
- Insight Works resellers can consult on setup and job queue configuration

DATA & PORTABILITY

- Shipments, picks, movements, and reservations are standard Business Central records linked to the originating order
- Availability is a calculated result, refreshed when Recalculate, Split Allocation, or Reload Orders runs

SCOPE

- Decides what can ship and creates the documents; it does not perform the pick, the physical move, or the shipping label
- There is no priority field; sorting and filtering the list is how priority is expressed

ALSO FROM INSIGHT WORKS

Insight Works builds 30+ apps for Microsoft Dynamics 365 Business Central, concentrated in these areas of manufacturing and distribution. If Business Central has a gap, there's a good chance we already have a solution.

Warehouse & Inventory Management
Barcode-driven receiving, put-away, picking, cycle counting, and license plate handling.

Shipping & Fulfillment
Carrier rate shopping, pick-to-ship execution, and shipment tracking.

Quality Control & Compliance
Inspections, test management, and quality documentation.

Production Planning & Scheduling
Capacity-aware scheduling, planning worksheets, and demand forecasting.

Shop Floor Execution & Maintenance
Shop floor data capture, machine maintenance, and production analysis.

Point of Sale & Data Tools
Counter sales, document attachment, label printing, and bulk data import/export.

See all Insight Works apps for Business Central

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