

System Solutions Requisition Worksheet with Sales History

USER GUIDE

Description

The System Solutions Requisition Worksheet with Sales History allows Microsoft Dynamics 365 Business Central users to calculate requisition worksheets according to sales history and displays past sales amounts, categories, vendor costs, and other details useful for ordering.

Usage

- Once installed search and open Requisition Worksheets.
- On the page use the added function -> "Process" -> "Calc. Req. Per Sales History."
- Insert the date and it will create a Requisition Worksheet for the items sold in the selected period.
- Enable the "Update Existing Purchase Orders" setting if you'd like to check for open purchase orders and increase the quantities on them as calculated.
- If you'd like to order the items in multiples, select the field to use as the multiple in the "Round Quantity Up to" field. Quantities can be rounded up to order multiple, minimum order quantity, purchase price minimum quantity, or price list minimum quantity.

← Requisition Worksheets

Name DEFAULT

Manage Process Report Drop Shipment Special Order Line Item Availability by More options

Calculate Plan... Reserve Carry Out Action Message... Calc. Req. Per Sales History

Type	No.	Unit of Measure Code	Location Code	Category Level 1	Level 2	Level 3	Level 4	Action Mes...	Action Message	
→ Item	:	1003	BOX	WEST				New	<input checked="" type="checkbox"/>	Tr
Item		0010108	PCS	WEST	FURNITU...	CHAIR		New	<input checked="" type="checkbox"/>	3
Item		0010215	PCS	WEST				New	<input checked="" type="checkbox"/>	9
Item		1003	BOX	WEST	FURNITU...	TABLE	TEST	New	<input checked="" type="checkbox"/>	Tr
Item	:	1003	BOX		FURNITU...	TABLE	TEST	New	<input checked="" type="checkbox"/>	Tr
Item		AATEST	PCS	WEST				New	<input checked="" type="checkbox"/>	A
Item		AATEST	PCS					New	<input checked="" type="checkbox"/>	A

Added Columns:

Some will be added by default, some can be added using Personalize.

- Sold: Current Month
- Sold: Last 7 Days
- Sold: Last 30 Days
- Sold: Last 365 Days
- Sold: Last Year Next 30 Days
- Sold: Last Month
- Sold: 2 Months Ago

- Sold: 3 Months Ago
- Sold: 4 Months Ago
- Sold: 5 Months Ago
- Sold: 6 Months Ago
- Sold: 7 Months Ago
- Sold: 8 Months Ago
- Sold: 9 Months Ago
- Sold: 10 Months Ago
- Sold: 11 Months Ago
- Sold: 12 Months Ago
- Category (show all Category levels)
- Attribute(s) with Attribute Name as Column Header.
- Quantity on Hand
- Delete (Quick Delete)

Additional Questions? Contact Us.

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