System Solutions LLC Requisition Worksheet with Sales History for D365 Business Central User Guide

Extension

- Extension Version Number: 2.0.0.0
- Extension Version Date: 07/28/2025
- Published by: System Solutions LLC
- Find more extensions for Microsoft Dynamics 365 Business Central by System Solutions LLC

System Requirements

- Microsoft Dynamics 365 Business Central version 26.0 or higher.

Description

Calculates requisition worksheets according to sales history and displays past sales amounts, categories, vendor costs, and other details useful for ordering. This extension adds an additional calculate action named **Calc. Req. Per Sales History**, which allows you to add lines to the worksheet based on the quantity sold in the specified date range. Multiple new fields in the lines and Fact Box show information about the quantities sold during different periods, levels of categories, and more.

Operation Instructions

- 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.
- Multiple fields that help with ordering have been added to the worksheet lines and fact box. They can be made visible using Personalize.

Added Columns and Fact Boxes

- Some fields will be added to the worksheet as columns and in the Fact Box, by default, after installation. All columns, including those not added by default, and the Fact Box display can be turned on or off using Personalize. All quantity sold and on hand fields consider the line's set location code. The following fields are added to the worksheet lines:
  - 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 Level 1
    - Category Level 2
    - Category Level 3
    - Category Level 4
    - Qty. on Hand
    - Qty. on Hand (All Locations)
    - Tariff No.
- The following Fact Boxes can be added with Personalize:
    - **Sales History**: The quantity sold fields, also shown on the lines (listed above).
    - **Vendor Price**: Shows the cost of the item from multiple vendors. This also work with purchase price lists if enabled.
    - **Item Attributes**: Shows the names of the item attributes for the selected item.

Some Usage Scenarios

- You need to order items that satisfy Item Card (or SKU Card) > Planning Requirements fields but you may want to review additional Items to satisfy Vendor minimum order size or Vendor discount tiers based on order size.
    - Run the native "Calculate Plan" function to create lines for the needed Items
    - Then run the "Calc. Req. Per Sales History" and set Filters to encompass reasonable date range to see what has been selling, Vendor(s), etc
        - General: From Date = <something from the past, example 1 year ago>
        - General: To Date = T (this would yield today)
        - Filter: Item > Vendor No. (if wanting to find additional Items to purchase just for 1 or more vendors)
            - Many additional Item Filters can be set on Item Card fields
        - Filter: Past Sales
            - Many additional Sales Filters can be set on Sales related fields
        - Click Ok and this will ADD additional Items to the Worksheet to those already on the worksheet from the "Calculate Plan"