

System Solutions LLC Length and Sheet Tally for Microsoft Dynamics 365 Business Central

Extension

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System Requirements

- Microsoft Dynamics 365 Business Central version 25.0 or higher.

Description

The Length and Sheet Tally extension for Microsoft Dynamics 365 Business Central streamlines the process of calculating the total quantity of an item based on its relevant measurements during a sale. Two options are available based on the item's configuration: Length Tally calculates the quantity from multiple lengths and quantities, while Sheet Tally calculates the quantity from multiple lengths and widths. This extension automatically prompts a page for input when an item is configured with either the Length Tally or Sheet Tally, at the time it is added to a Sale or Invoice. It then calculates the total quantity and generates comment lines detailing the recorded measurements.

Key Features

- **Automated Quantity Calculation:** Automatically calculates the total quantity of an item from various lengths and quantities or a length and width.
- **User-Friendly Input:** Prompts a dedicated page for inputting measurements based on the type of item.
- **Detailed Comments:** Adds comment lines to the sale to describe each measurement used to calculate the quantity, providing clear and detailed records.

Setup Instructions

- **Enable Length Tally or Sheet Tally for an Item**
 - Under the "Prices & Sales" section of the Item Card, enable the "Use Tally Length" or "Use Sheet Tally" setting. The item will now prompt the selected tally page when it's added to a sale.
 - **Setup the Item Card Units of Measure**
 - Sheet Tally Item example of units of measure (UoM)
 - In our example, Lexan is purchased by the Sheet (example Sheet is 6 ft x 8 ft) and is cut to the (length x width) size requested by Customer, to yield Sq In, and sold by the Sq Ft.
 - Create the following Units of Measure for the Item:
 - Sheet, Qty = 1
 - Sq In, Qty = 0.00014 (because this is how many Sheets there are in a Sq In using maximum Business Central UoM decimal places). This is our smallest UoM.

- Sq Ft, Qty = 0.02083 (because this is how many Sheets there are in a Sq Ft using maximum Business Central UoM decimal places).
 - Set Item Card Base Unit of Measure = Sheet
 - Set Item Card Sales Unit of Measure = Sq In
 - Set the Item Card Purchase Unit of Measure = Sheet
 - Length Tally Item example of units of measure (UoM)
 - In our example, Molding is purchased by the linear FT and sold by the linear FT. It could also be purchased by the Board FT (BF) which is a volume measurement.
 - Create the following Units of Measure for the Item:
 - FT, Qty = 1
 - BF, Qty = (this depends on the size of the molding and we would need to calculate the number of FT in a BF and set this Qty).
 - Set the Item Card Base Unit of Measure = FT
 - Set the Item Card Sales Unit of Measure = FT
 - Set the Item Card Purchase Unit of Measure = BF or FT depending on how purchased.
- **Sheet Tally Rounding**
 - If you'd like to round the quantity calculated on the Sheet Tally page, search for and open the page called "Length and Sheet Tally Setup." Enabled the "**Round Sold Sheet Quantity**" setting.
 - The "**Maximum Quantity to Round**" setting allows you to only round quantities up to a maximum. For example, if you only want quantities below 1 to be rounded to 1, set this Maximum to 1. Quantities such as 1.25 will not be rounded to 2. The "Round Sold Sheet Quantity" setting must also remain enabled.
- **Sheet Tally Preset Fractions**
 - The Sheet Tally page allows the user to select preset fractions for convenience. To add to the list of available fractions, search for and open the page called "Sheet Tally Preset Fractions."

How to Use the Length Tally Feature

Once the Length Tally feature is enabled and units of measure are setup for an item:

- **Add the item** to a sales order, sales invoice, or POS sales invoice.
- **Input Lengths and Quantities**
 - The Length Tally page will automatically open
 - Enter the various lengths and quantities as required.
- **Finalize the Sale**
 - Close (or Esc) the Length Tally page.
 - The total quantity of the item will be calculated and used in the sale.
 - Comment lines describing each tallied length will be added to the sale for record-keeping.

How to Use the Sheet Tally Feature

Once the Sheet Tally feature is enabled and units of measure are set up for an item:

- **Add the item** to a sales order, sales invoice, or POS sales invoice.
- **Input Length and Width**
 - The Sheet Tally page will automatically open.

- Add a new line and input the whole number and fraction for the length and width. The units of length and width will default to the linear units (in this case inches) used to calculate the smallest available area for the sheet item (in this case Sq In).
- **Select the Measured Area Unit of Measure**
 - The Sheet Tally page is designed to allow sheets to be measured and sold in different units of measure.
 - The Measured Area Total calculates the area from the inputted length and width.
 - Select the Measured Area Unit of Measure (for example Sq In). As noted, it will default to the smallest available unit of measure for the item.
- **Select the Sell As Unit Quantity**
 - If the line's calculated quantity should be multiplied by additional units, input a value into the Sell As Unit Quantity. Otherwise, this will default to 1 per line.
- **Select the Sell As Unit of Measure**
 - Select the Sell As Unit of Measure in the page header. This is the unit of measure that the item will be sold in (for example, square feet). It will default to the Sale Unit of Measure on the Item Card.
 - The Sell As Total Area shows the converted quantity based on the selected units and quantities for each line.
 - It will be rounded up if the "Round Sold Sheet Quantity" field was enabled during the extension's setup.
 - The Sell As Total Quantity is the total quantity of all lines on the page that will be used in the sale.
- **Finalize the Sale**
 - Close (or Esc) from the Sheet Tally page.
 - The total quantity of all lines, "Sell As Total Quantity," and its unit of measure, "Sell As Unit of Measure," will be used in the sale.
 - Comment lines describing the inputted lengths and widths will be added to the sale for record-keeping. If a Sell As Unit Quantity greater than 1 was specified for a line, it will be shown at the end of the comment in parentheses.