



# Order Fulfilment Planner

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## User Manual

A practical guide to understanding, monitoring and managing sales-order fulfilment in Microsoft Dynamics 365 Business Central.

### **What this manual explains**

This manual explains not only how to use each feature, but what the information represents, where it comes from in the planner, and how it should be interpreted operationally.



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## 1. About the Order Fulfilment Planner

Binary Lab developed the Order Fulfilment Planner for Microsoft Dynamics 365 Business Central to give sales, warehouse and fulfilment users a single operational view of open sales orders. It brings together shipment dates, outstanding quantities, stock coverage, fulfilment status and warehouse progress so users can identify exceptions without opening each sales order individually.

See which open orders are ready to fulfil and which require intervention.



Identify shortages affecting current shipments and future commitments.  
See which item lines are causing an order's status.  
Review order and line shipment dates visually against a Week or Month timeline.  
Inspect stock coverage and shortage quantities for the selected order.  
Move directly from the planner to the underlying Business Central sales order.

**Operational focus**

The planner is designed for exception management. It helps answer: What can ship? What cannot ship? What may become a problem? What is already late? Which item is causing it?

## 2. Accessing the Order Fulfilment Planner

The Order Fulfilment Planner can be opened from the Order Fulfilment cues made available in Business Central. The cues provide a quick operational summary from the Role Center and give users a convenient entry point into the planner without having to search for the page each time.

### Opening the planner from the Role Center

1. Open the Business Central Role Center where the Order Fulfilment cues are available.
2. Locate the Order Fulfilment cue group. The cues provide at-a-glance counts for the fulfilment conditions exposed by the extension.
3. Select the relevant Order Fulfilment cue to open the Order Fulfilment Planner.
4. Once the planner opens, use the status cards, filters, search and timeline controls described in the following sections to focus the orders you need to review.

### What the cues are for

The cues are intended to surface fulfilment exceptions and workload directly on the Role Center. They let a user see that orders require attention before opening the full visual planner. The planner then provides the line-level detail, shipment-date timeline, stock coverage and fulfilment progress needed to investigate those orders.

| Cue / condition | What it represents                                                                                                                            |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Open            | The open sales-order population considered by the Order Fulfilment Planner.                                                                   |
| Ready           | Orders whose outstanding item requirements are covered by the planner's stock allocation and are ready from a stock-availability perspective. |



|         |                                                                                                                                               |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Short   | Orders with current or due outstanding demand that is not fully covered by allocated stock.                                                   |
| At Risk | Orders with future shipment demand that is not fully covered by allocated stock, providing advance warning of a potential fulfilment problem. |
| Overdue | Orders containing outstanding item demand with a shipment date before today.                                                                  |

#### Role Center availability

The exact placement of the Order Fulfilment cues depends on the Role Center and Business Central configuration in use. If the cues are not visible on the user's Role Center, the Business Central administrator or implementation partner should confirm that the extension and the relevant Role Center integration are available to that user.

### 3. Planner screen overview

The screen is divided into four main working areas. The status cards summarize the open-order population; filters and search narrow that population; the Fulfilment Timeline shows orders and item shipment dates; and the Sales Order Detail panel explains the selected order.

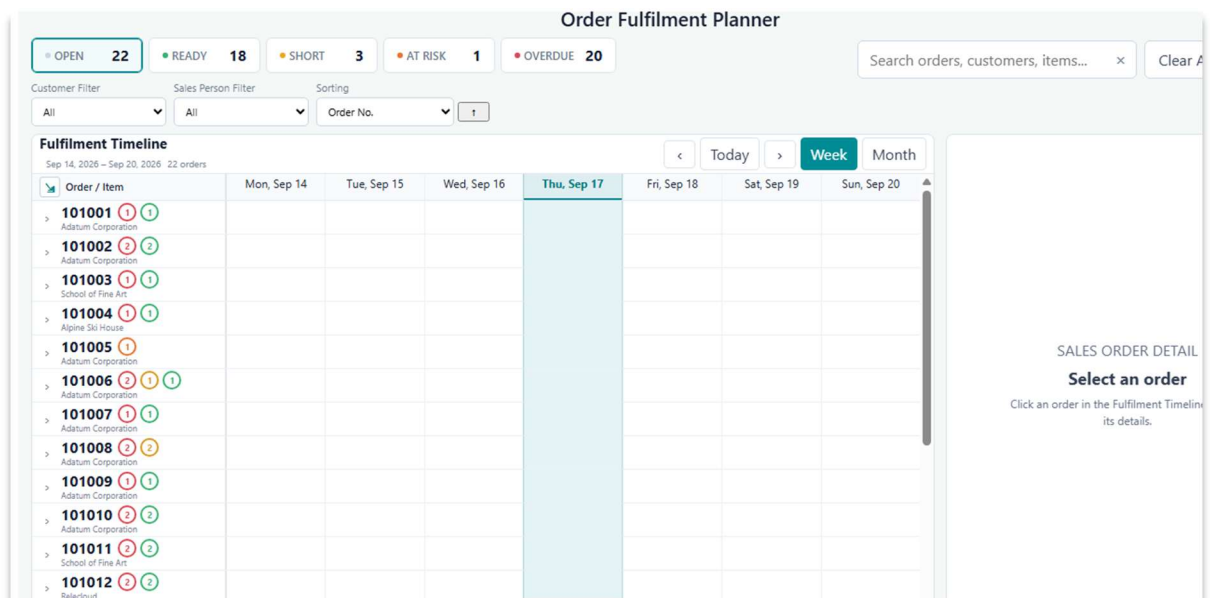


Figure 1 - Order Fulfilment Planner overview.



| Area                | What it is for                                         | What it represents                                                                                                       |
|---------------------|--------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| Status cards        | Quickly isolate fulfilment conditions.                 | Counts of open orders that meet Ready, Short, At Risk or Overdue conditions.                                             |
| Filters and Search  | Reduce the planner to the orders relevant to the user. | Customer, sales person and free-text criteria applied to the displayed orders.                                           |
| Fulfilment Timeline | Visualize orders and shipment commitments over time.   | Outstanding sales-order item lines positioned against their shipment dates.                                              |
| Sales Order Detail  | Explain the selected order in more depth.              | Customer, salesperson, status, shipment range, warehouse handling, fulfilment progress and line-level stock information. |

## 4. Understanding fulfilment statuses

A status tells the user something specific about an outstanding sales-order requirement. Statuses can overlap because shipment timing and stock readiness are different facts.

| Status  | What it means                                                                       | Why it matters                                                                                   |
|---------|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|
| Ready   | The outstanding requirement is covered by the stock allocated to it by the planner. | The stock constraint is resolved and the requirement can proceed through its fulfilment process. |
| Short   | The requirement is due today or earlier and the allocated stock is insufficient.    | There is an immediate fulfilment problem that needs attention.                                   |
| At Risk | The requirement has a future shipment date but allocated stock is insufficient.     | The planner is giving advance warning that the future shipment may not be fulfilled as planned.  |



|         |                                    |                                                                                             |
|---------|------------------------------------|---------------------------------------------------------------------------------------------|
| Overdue | The shipment date is before today. | The planned shipment date has already passed, regardless of whether stock is now available. |
|---------|------------------------------------|---------------------------------------------------------------------------------------------|

**Why an order can be Ready and Overdue**

An overdue order can still have sufficient stock. In that case Overdue describes the missed date while Ready describes the current stock position. Both pieces of information are useful.

## 5. Reading the Fulfilment Timeline

The left-hand Order / Item column identifies the sales order and customer. The horizontal area to the right is the time scale. When an order is collapsed, colored outline circles summarize the statuses affecting its outstanding lines.

The number inside an order status circle is the number of affected item lines for that status.

The marker is positioned against the relevant shipment date when that date falls in the displayed period.

An order can show more than one colored circle because different statuses may apply.

The highlighted date column identifies today when today is in the displayed period.

The Order / Item column remains fixed while the timeline scrolls horizontally.

**Example**

If a collapsed order shows a red circle with 2 and a green circle with 2, two outstanding lines are overdue and two lines are stock-covered/ready. The same lines can contribute to both conditions.

## 6. Expanding orders and understanding item lines

Expand an order when you need to see exactly which outstanding item lines are driving its fulfilment position. The expanded line contains operational information, not just an item description.

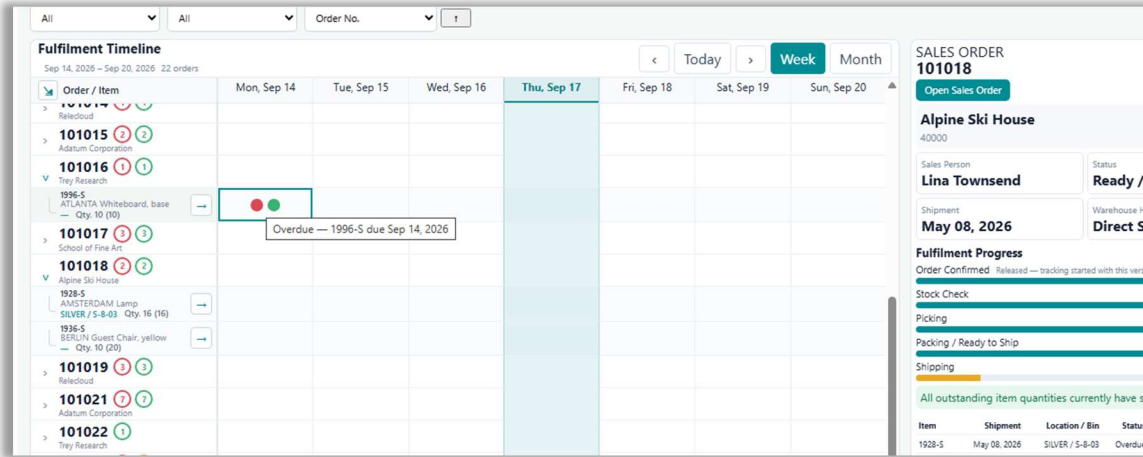


Figure 2 - Expanded orders show item-line information and shipment markers.

| Item-line element | What it represents                                                                               | How to use it                                                                                                                                                   |
|-------------------|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item No.          | The Business Central item number on the outstanding sales-order line.                            | Identifies the product that must still be fulfilled.                                                                                                            |
| Description       | The sales-line item description.                                                                 | Makes the item easier to recognize without opening the sales order.                                                                                             |
| Location / Bin    | The Location Code assigned to the sales line and, where present, the Bin Code used for the line. | Shows where the requirement is expected to be fulfilled from. The bin gives a more specific warehouse storage/handling point.                                   |
| Qty. x (y)        | x is the quantity still outstanding; y in brackets is the original sales-line quantity.          | Shows both what remains to be fulfilled and the original size of the line. For example, Qty. 3 (10) means 3 remain outstanding from an original quantity of 10. |
| Status marker     | A colored marker positioned on the item's shipment date.                                         | Shows the line's fulfilment/date condition at the point it is expected to ship.                                                                                 |



|                     |                                                                       |                                                                                                      |
|---------------------|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| Go to shipment date | The small arrow button at the right of the expanded item information. | Moves the timeline to the item's shipment date when that date is outside the current visible period. |
|---------------------|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|

Selecting or expanding an order also synchronizes the Sales Order Detail panel on the right, so the timeline and detail view refer to the same order.

## 7. Sales Order Detail panel

The Sales Order Detail panel explains why the selected order appears the way it does in the planner. It combines order-level context, fulfilment progress and a line table showing the quantities behind stock-related statuses.

### Order information

| Field              | What it represents                                                                                                                                                                              |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Order        | The Business Central sales order number. Open Sales Order opens the source document.                                                                                                            |
| Customer           | The customer name and customer number from the sales order.                                                                                                                                     |
| Sales Person       | The salesperson associated with the order.                                                                                                                                                      |
| Status             | The fulfilment statuses currently affecting the order. Multiple statuses can be displayed.                                                                                                      |
| Shipment           | The shipment date when the relevant outstanding lines share a date, or the range from the earliest to latest outstanding-line shipment date when they differ.                                   |
| Warehouse Handling | The handling route detected for the order, such as Direct Sales Order or Warehouse Pick + Shipment. If lines use different handling methods, the planner can indicate mixed warehouse handling. |

### Fulfilment Progress

| Progress indicator | What it is intended to tell the user                                                            |
|--------------------|-------------------------------------------------------------------------------------------------|
| Order Confirmed    | Whether the sales order has been released and is therefore confirmed for fulfilment processing. |



|                         |                                                                                                                                                    |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| Stock Check             | The degree to which the outstanding item demand is covered by the stock allocation calculated by the planner.                                      |
| Picking                 | Progress associated with getting the outstanding requirement picked/available for fulfilment according to the handling detected by the planner.    |
| Packing / Ready to Ship | Indicates how much of the outstanding requirement has reached a ready-to-ship position in the planner's fulfilment view.                           |
| Shipping                | Shows shipment progress against the order quantities, so partial shipment is visible rather than treating the order as simply shipped/not shipped. |

### Stock message and item table

Below the progress indicators, the planner gives a simple stock message. When all outstanding item quantities are covered it displays a green confirmation. When one or more lines are not covered it displays a Stock Shortage warning and the number of affected lines.

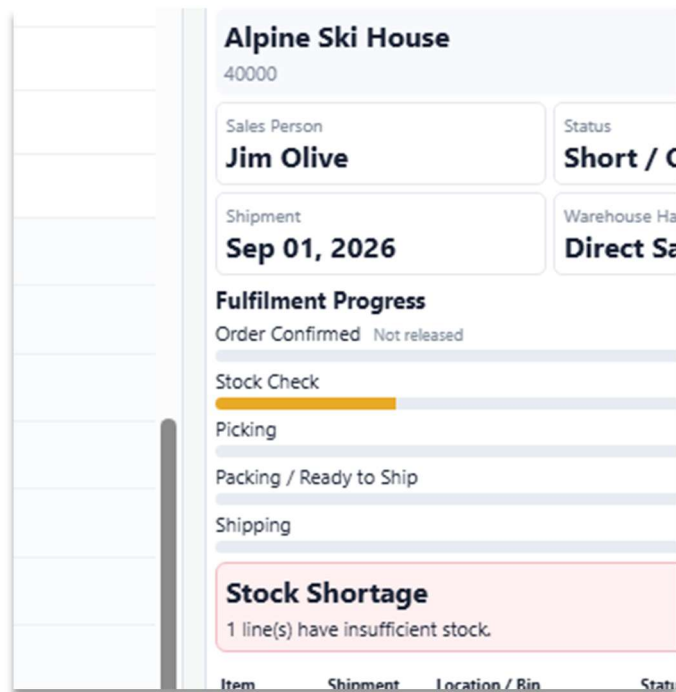


Figure 3 - Example of an order with a stock shortage.



| Column         | Meaning                                                                                                   |
|----------------|-----------------------------------------------------------------------------------------------------------|
| Item           | The item number causing or contributing to the selected order's fulfilment position.                      |
| Shipment       | The shipment date on that sales-order line.                                                               |
| Location / Bin | The fulfilment location and, where applicable, bin.                                                       |
| Status         | The status or statuses applying to that item line.                                                        |
| Qty.           | Outstanding quantity, with original sales-line quantity in brackets.                                      |
| Stock          | The quantity of the outstanding requirement covered by the planner's current allocation.                  |
| Short          | The uncovered portion of the outstanding quantity. This is the quantity contributing to Short or At Risk. |

**Reading the shortage example**

Qty. 15 (15), Stock 4, Short 11 means 15 units remain outstanding from an original quantity of 15. The planner can currently cover 4 of them, leaving 11 units uncovered.

## 8. Filters and search

Filters are designed to work together. Each active criterion narrows the set of orders displayed in the timeline.

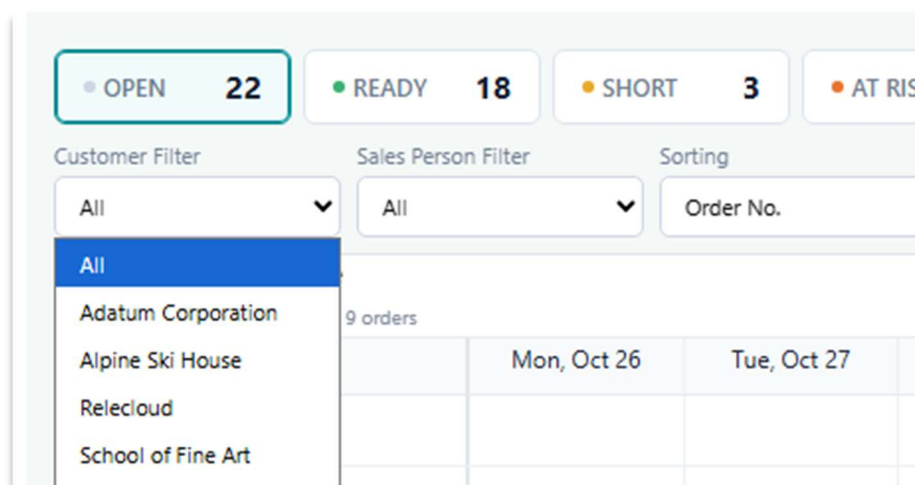


Figure 4 - Customer filtering can be combined with Search and the other planner controls.



| Control             | What it filters                                                                                                    |
|---------------------|--------------------------------------------------------------------------------------------------------------------|
| Status cards        | Orders meeting the selected Ready, Short, At Risk or Overdue condition. Open returns to the open-order population. |
| Customer Filter     | Orders for the selected customer.                                                                                  |
| Sales Person Filter | Orders assigned to the selected salesperson.                                                                       |
| Search              | Order number, customer name, item number and item description.                                                     |

Search is especially useful for item investigation. Searching an item number returns orders containing that item, after which status, customer and salesperson filters can narrow the result further.

#### Refresh behavior

If Search is active when Refresh is used, the search text remains visible after the data reload. This makes the active criterion clear and avoids a hidden filter.

## 9. Sorting orders

Sorting changes the display order of the sales orders in the timeline. It does not change the sales orders themselves and does not change stock allocation.

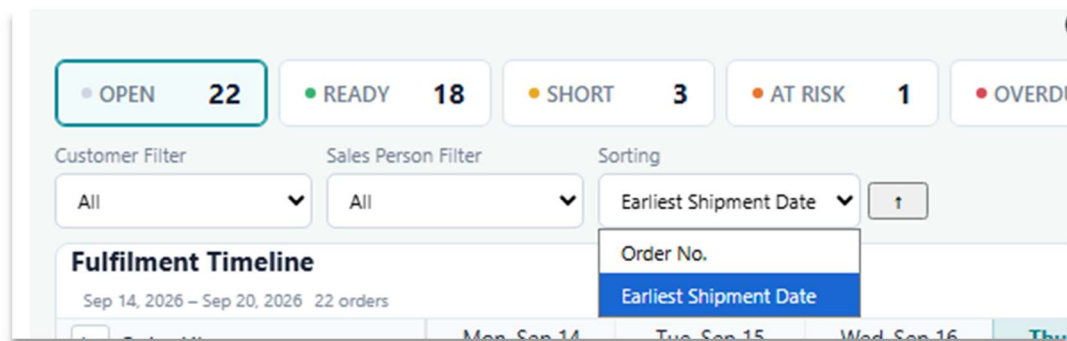


Figure 5 - Sorting options and the ascending/descending direction control.

| Sort option            | What it does                                                                                                |
|------------------------|-------------------------------------------------------------------------------------------------------------|
| Order No.              | Sorts the displayed sales orders by their Business Central sales order number.                              |
| Earliest Shipment Date | For each order, the planner looks at the shipment dates of its relevant outstanding item lines and uses the |



|  |                                                                                                                                               |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------|
|  | earliest of those dates as the order's sorting date. This brings orders with the earliest shipment commitment together when sorted ascending. |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------|

The arrow button controls direction: the upward arrow indicates ascending and the downward arrow indicates descending. For Earliest Shipment Date, ascending places earlier shipment commitments before later ones; descending reverses that display order.

**Important**

Earliest Shipment Date is a display sort. Changing it does not reprioritize or reallocate inventory. Inventory allocation is calculated independently from the visual sort selected by the user.

## 10. Week and Month views

Week and Month change the time scale of the Fulfilment Timeline without changing the underlying order data.

| View  | Best used for                            | What is shown                                                                     |
|-------|------------------------------------------|-----------------------------------------------------------------------------------|
| Week  | Day-to-day fulfilment management.        | The week containing the current anchor date, with day and date headings.          |
| Month | Broader planning and future-risk review. | The days of the selected month. Horizontal scrolling is available where required. |

The previous and next buttons move one period at a time. Today returns to the current period. In Month view, Today also brings the current day into the visible timeline area.

## 11. Navigating the timeline and shipment dates

An item's shipment date may fall outside the currently visible week or month area. The planner deliberately does not jump automatically whenever an item is selected, because doing so would make it difficult to inspect multiple lines while retaining the current planning context.

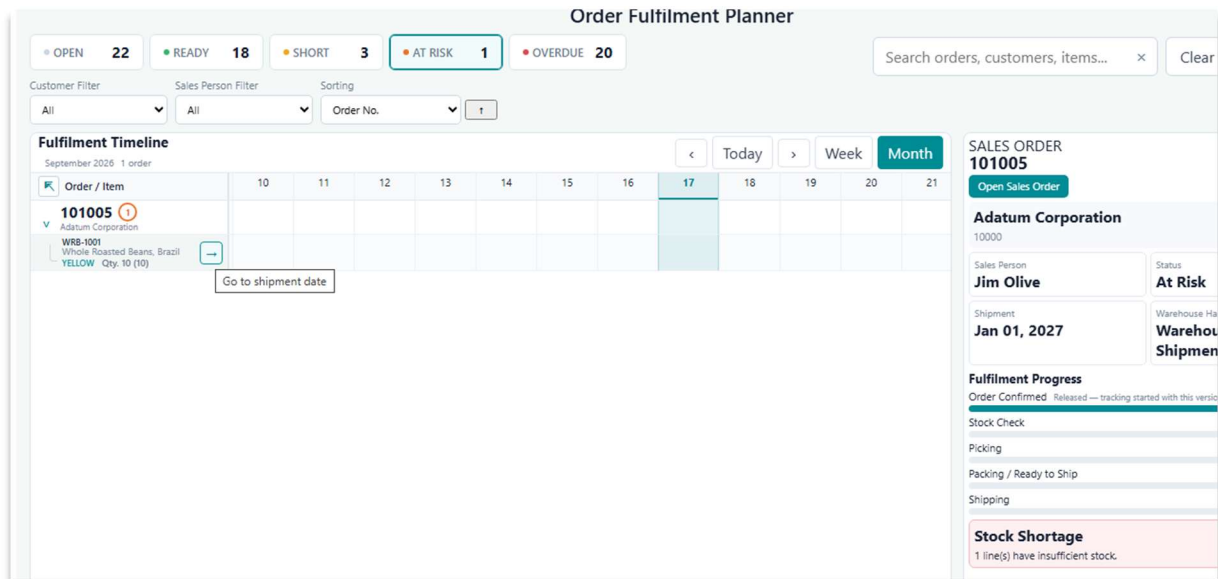


Figure 6 - Month view, At Risk order and the Go to shipment date control.

Use the small arrow on an expanded item line to Go to shipment date. The planner moves to the period containing that line's shipment date and brings the date into view. This works across periods, including a shipment date in another month.

### Why the button is useful

It lets the user choose when to leave the current timeline position. This preserves the holistic planning view while still providing one-click navigation to a specific commitment.

## 12. Refresh and Clear All

| Control   | Purpose                                                                                                                                                                                         |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Refresh   | Reloads the planner data from Business Central so changes to orders, inventory, shipment dates and fulfilment progress can be reflected.                                                        |
| Clear All | Returns the planner to its baseline state: clears status/customer/salesperson/search criteria, clears the selected order, collapses expanded lines and resets sorting to Order No. - Ascending. |



## 13. How stock availability and allocation are interpreted

The planner does not compare every sales-order line independently with the full inventory balance. Doing that would allow the same stock to make several competing orders appear Ready. Instead, available stock is treated as a pool that is progressively consumed by outstanding demand.

### Allocation principle

Only outstanding item demand is considered for fulfilment.

Stock is considered in the relevant item/location context and, where a Bin Code is specified on the line, the bin context is used by the planner.

As the allocation routine processes demand, the available pool is reduced by the quantity allocated to earlier processed demand.

A line's Stock value is therefore the quantity allocated to that line, not a promise that the full physical inventory balance is exclusively reserved in Business Central.

Short is calculated from the outstanding requirement that remains uncovered after allocation.

### Worked allocation example

Assume three outstanding requirements compete for a stock pool of 6 units:

| Order  | Shipment | Outstanding | Allocated Stock | Short | Result                                              |
|--------|----------|-------------|-----------------|-------|-----------------------------------------------------|
| SO1001 | 18 Sep   | 4           | 4               | 0     | Ready                                               |
| SO1002 | 20 Sep   | 3           | 2               | 1     | At Risk if the date is future; Short if due/current |
| SO1003 | 25 Sep   | 5           | 0               | 5     | At Risk if the date is future; Short if due/current |

The first processed requirement consumes 4 units, leaving 2. The next requirement receives those remaining 2 units and is short 1. No stock remains for the third requirement, so its full outstanding quantity is uncovered.

#### Allocation order in the current product

The planner's allocation routine processes outstanding sales lines using its Business Central record ordering, which includes Item, Location and Shipment Date in the active key. Earlier shipment dates are therefore used within that item/location demand sequence. Where lines share the same key



values/date, this manual does not claim an additional Order No./Line No. tie-breaker that the current implementation does not explicitly enforce.

This allocation is a planner calculation used to expose fulfilment risk. It is not the same thing as creating a Business Central reservation or physically reserving inventory against a sales order.

**Sorting is separate**

Changing the on-screen Sorting option does not change the allocation sequence. It only changes how the already-calculated orders are displayed.

## 14. Recommended daily workflow

1. Refresh the planner to work from current Business Central data.
2. Review Overdue to identify shipment commitments that have already passed.
3. Review Short to identify immediate stock shortages.
4. Review At Risk to identify future commitments that can still be protected by taking action early.
5. Review Ready to identify orders that can proceed through fulfilment.
6. Use Customer Filter, Sales Person Filter or Search to focus responsibility or investigate a particular item/customer.
7. Expand the relevant order to identify the specific lines, locations/bins, quantities and shipment dates involved.
8. Review the Sales Order Detail panel to understand stock coverage, shortages and fulfilment progress.
9. Use Open Sales Order to continue the required work in Business Central.
10. Refresh again after meaningful operational changes when you want the planner to recalculate from current data.

## 15. Worked examples

**At Risk: future date, no stock**

In Figure 6, order 101005 is At Risk. Its shipment date is Jan 01, 2027, Qty. is 10 (10), Stock is 0 and Short is 10. The shortage exists, but the shipment date is still in the future.



The planner therefore provides an early warning rather than treating the line as a current Short.

### **Short and Overdue**

In the shortage example, the shipment date has already passed and only part of the outstanding requirement is covered. Overdue describes the missed shipment date; Short describes the uncovered current requirement.

### **Ready and Overdue**

An order can show Ready / Overdue when its planned shipment date has passed but all outstanding quantities now have stock available. Operationally, the order is late but the stock obstacle has been removed.

### **Partially shipped line**

If an expanded line shows Qty. 3 (10), the original sales-line quantity was 10 and only 3 remain outstanding. The planner focuses fulfilment status and stock coverage on those 3 remaining units.

## **16. Troubleshooting and FAQs**

### **Why does an order have more than one status?**

Because date performance and stock readiness describe different conditions. The same order can therefore be Overdue and Ready, or Overdue and Short.

### **What do the numbers in the circles mean?**

They are affected-line counts for the status represented by that circle, not order quantities.

### **Why can an item line show Qty. 3 (10)?**

3 is the outstanding quantity still to fulfil; 10 is the original sales-line quantity.

### **What does Stock mean in the detail table?**

It is the quantity of that outstanding line currently covered by the planner's cumulative stock allocation.

### **What does Short mean?**

The part of the outstanding quantity not covered by the planner's allocation.

### **Where does Earliest Shipment Date come from?**



It is the earliest shipment date among the order's relevant outstanding item lines and is used only for display sorting.

**Does sorting by Earliest Shipment Date change which order gets stock?**

No. Visual sorting and stock allocation are separate.

**Why does my search remain after Refresh?**

The search is intentionally preserved and remains visible so the filtered result is not caused by a hidden criterion.

**Why is the shipment marker not visible?**

The shipment date may be outside the current visible period. Expand the item and use Go to shipment date.

**What does Warehouse Handling mean?**

It describes the fulfilment route detected for the order, for example Direct Sales Order or Warehouse Pick + Shipment.

## 16. Quick reference

| Control / information | Meaning / action                                       |
|-----------------------|--------------------------------------------------------|
| Open                  | Full open-order population.                            |
| Ready                 | Outstanding demand is covered by allocated stock.      |
| Short                 | Due/current outstanding demand is not fully covered.   |
| At Risk               | Future outstanding demand is not fully covered.        |
| Overdue               | Shipment date is before today.                         |
| Qty. 3 (10)           | 3 outstanding from an original line quantity of 10.    |
| Location / Bin        | Where the sales line is expected to be fulfilled from. |
| Stock                 | Quantity covered by the planner's allocation.          |



## Binary Lab (Pty) Ltd

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|                        |                                                                                                  |
|------------------------|--------------------------------------------------------------------------------------------------|
| Short column           | Outstanding quantity not covered by the allocation.                                              |
| Earliest Shipment Date | Earliest shipment date on the order's relevant outstanding item lines; used for display sorting. |
| Go to shipment date    | Navigate the timeline to the item's shipment date.                                               |
| Open Sales Order       | Open the source Business Central sales order.                                                    |
| Refresh                | Reload current planner data.                                                                     |
| Clear All              | Reset planner filters, selection, expansion and sorting.                                         |

## Version Information

| Detail                   | Information                             |
|--------------------------|-----------------------------------------|
| <b>Add-on Name</b>       | Order Fulfilment Planner                |
| <b>Publisher</b>         | Binary Lab (Pty) Ltd                    |
| <b>Supported Product</b> | Microsoft Dynamics 365 Business Central |
| <b>Release Date</b>      | September 2026                          |