

Visual Indicators – User Manual

Developed by Evozon Systems for Dynamics 365 BC

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Introduction

Visual Indicators is an add-on for Microsoft Dynamics 365 Business Central, developed by Evozon Systems.

The aim of this add-on is to help you with information regarding stock availability with a simple but effective addition: signs resembling traffic lights added to sales, delivery, production, job, service, transfers and assembly lists and lines.

The colors of the indicator represent different stock availability thresholds, thus making it easier for the user to know whether an order/task can be completed and to what extent.

Set-up

In order to activate the Visual Indicators add-on, access the “Visual Indicator Setup” page from within Dynamics 365.

Here, you will have the following options:

- Payment Provider Base Url: In order to activate the add-on, you have to insert the following link: <https://api.stripe.com/v1/>
- You can activate/deactivate the visual indicator for each list separately.
- Set the desired images for each type of indicator. It is not mandatory to set an image for each type of indicator.

Visual Indicator Setup

Activate Module

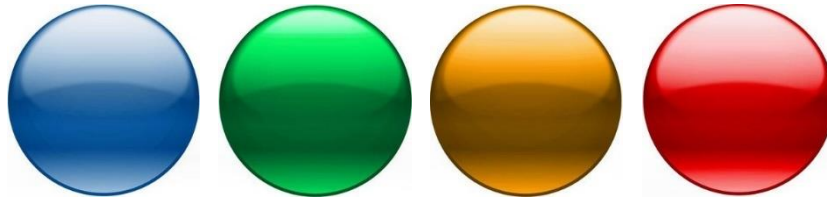
Payment Provider Base Url	<input type="text" value="https://api.stripe.com/v1/"/>	Active Item Availab. for Prod.	<input checked="" type="checkbox"/>
Activate Capable to Ship for Sale	<input checked="" type="checkbox"/>	Active Item Availab. for Serv.	<input checked="" type="checkbox"/>
Active Item Availab. for Asm.	<input checked="" type="checkbox"/>	Active Item Availab. for Transfer	<input checked="" type="checkbox"/>
Active Item Availab. for Jobs	<input checked="" type="checkbox"/>	Active Item Availab. for Whs. Ship	<input checked="" type="checkbox"/>

Flags

No shippable/consumable item	<input type="text" value="+"/>	Inventory lower than requested qty.	
Completely delivered		Item not on inventory	
Inventory greater than requested qty.			





Image 1 - Recommended setup

We recommend using the following indicators:



Indicator behavior

In the setup illustrated in “Image 1 - Recommended setup” and in this User Manual, the indicators mean the following:

- Blue  - Completely delivered (for example, a Sales Order that has been completely fulfilled)
- Red  - No available quantity to deliver (quantity is 0)
- Yellow  - Available quantity is less than the requested quantity, but greater than 0
- Green  - Available quantity is equal or greater than the requested quantity

All indicators are calculated based on physically available stock in the location that the document uses.

If you reserve a quantity on a document, the available stock calculated for other documents will change, thus, in some cases, changing the color of the indicator.

Indicator color combination on document/on list

- Same color on all lines of the document -> same color in the list
 - All products were shipped (Blue), all products are available to be shipped (Green), all quantities are less than required (Yellow), all products are out of stock (Red)
- Blue and Green lines on the document -> Green color in the list
 - Some products have already been shipped (Blue), the rest are available to ship (Green)
- Blue and Red lines on the document -> Red color in the list
 - Some products have already been shipped (Blue), the rest are out of stock (Red)
- Blue and Yellow lines on the document -> Yellow in the list
 - Some products have already been shipped (Blue), the quantity for the rest is less than the required quantity but not out of stock (Yellow)
- Green and Red lines on the document -> Yellow color in the list
 - Some products are available to be shipped (Green), the rest are out of stock (Red)
- Green and Red lines on the document -> Yellow color in the list
 - Some products are available to be shipped (Green), the quantity for the rest is less than the required quantity but not out of stock (Yellow)
- Yellow and Red lines on the document -> Yellow color in the list
 - The quantity for some products is less than the required quantity but not out of stock (Yellow), the rest are out of stock (Red)

If on a document you have other line types than “Item” (for example, Resource), the indicator will not be shown for those lines.

Lines		Manage	More options		
Type	Capable to Ship	No.	Description	Quantity	
→ Item	⋮ ●	12	Test	10	
Resource	+	0007	Assembly	1	

Image 2 - Item and Resource combination

In “Image 2 – Item and Resource combination” you can see how the indicators behave when you have an Item and a Resource on the same Sales Order.

Sales Indicators

After activating the add-on, a new column named “Capable to Ship” will appear in the Sales Order list. If there are lines where no indicator is shown, the Order does not contain any Item line types.

If the indicators are not immediately shown or you want the system to recalculate the values, press “Actions” -> “Refresh Shippable”.

We recommend personalizing your BC interface so the “Refresh Shippable” button is under the “Process” drop-down.

Ship	No. ↑	Customer No.	Sell-to Customer Name	No.	Location Code	ID	Date	St
+	⋮	4	1				11/03/2021	C
●		5	154	TEST VI BA			06/04/2021	C
+		6	154	TEST VI BA			06/04/2021	C

Image 3 - Sales Order list refresh

The indicators are visible on the Sales Order list but also on the document.

Lines	Manage	Line	Order	Fewer options		
Type	Capable to Ship	No.	Description	Quantity	Qty. to Ship	Quantity Shipped
Item	●	12	Bicycle	1		1
Item	●	0012	Desk	3	3	

Image 4 - Partial shipping

In “Image 4 – Partial shipping” the indicator for the first line is Blue because the ordered amount has already been shipped, but Green for the second line as this is available to be shipped.

Shipping Indicators

For Warehouse Shipment, the indicators work in the same manner as for Sales Orders. The indicators are visible on Warehouse Shipment lists but also on Warehouse Shipment lines.

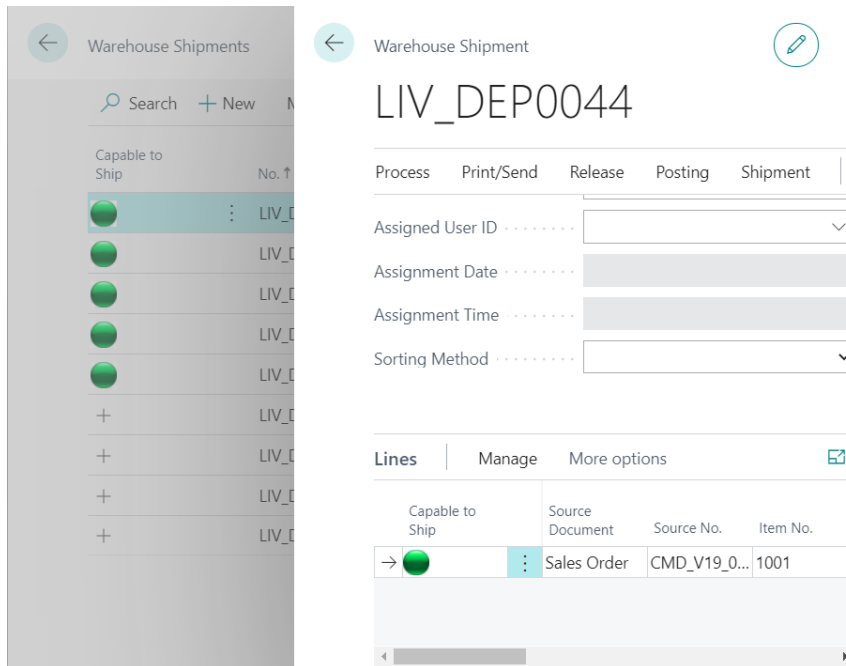


Image 5 - Warehouse Shipment list/document

Stock transfer Indicators

For Transfer Orders, the indicators work in the same manner as for Sales Orders. The indicators are visible on Transfer Order lists but also on Transfer Order lines.

Production Indicators

In the Production module, you can use the Visual Indicators for Released Production Orders.

The Visual Indicators will appear on the Production Order's line and also on the Production Order Components (see Image 6 below).

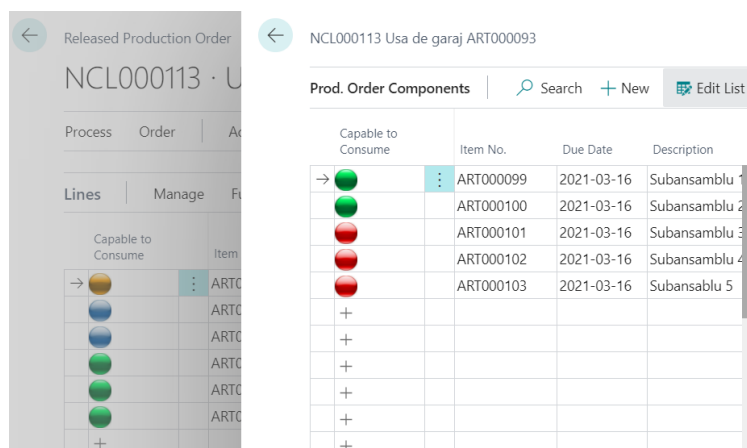


Image 6 - Released Production Order

In this example, the indicator on the first row of the Release Production Order is Yellow because some of the Components are out of stock (Red) but some are in stock (Green).

Service Indicators

In the Service module, you can use the Visual Indicators to check the availability of part necessary for a repair. You can see the indicators in the following lists:

1. Service Order List
2. In a Service Order document for every Item type line

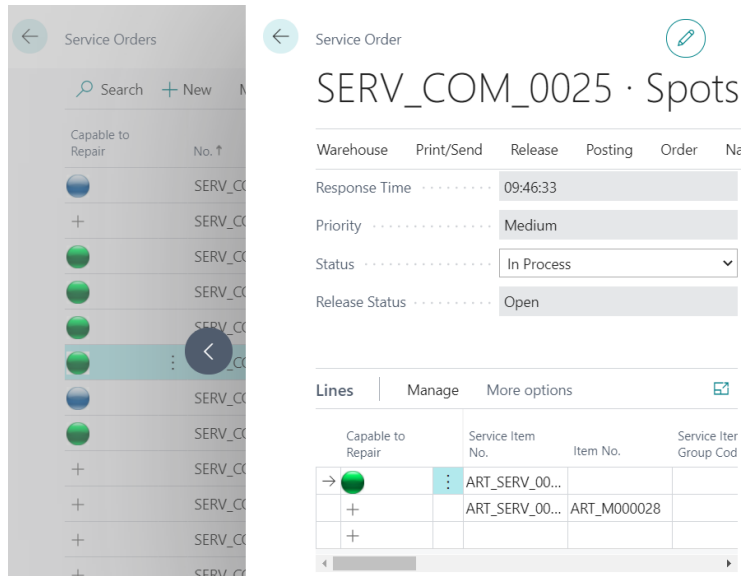


Image 7 - Service Order List/Document view

After shipping or total consumption, the indicator will turn Blue.

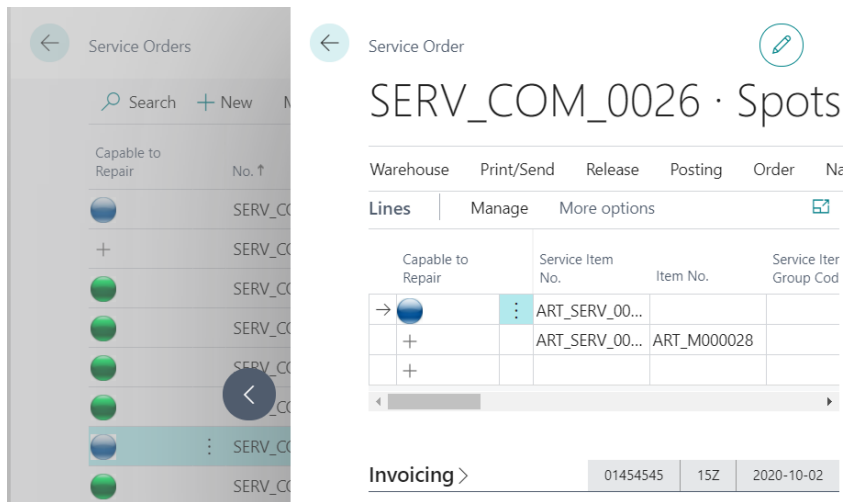


Image 8 - Shipped/Consumed Service Order

Job Indicators

In a Job, the indicators will be calculated based on the availability of the items specified on the Planning lines.

In this module, you will not have the indicator refresh button. The indicators will be update when navigating to a new line.

Assembly Indicators

For Assembly Orders, the indicators work in the same manner as for Sales Orders. The indicators are visible on Assembly Order lists but also on Assembly Order lines. The indicators are calculated based on the availability of the components specified in the Assembly Order list.

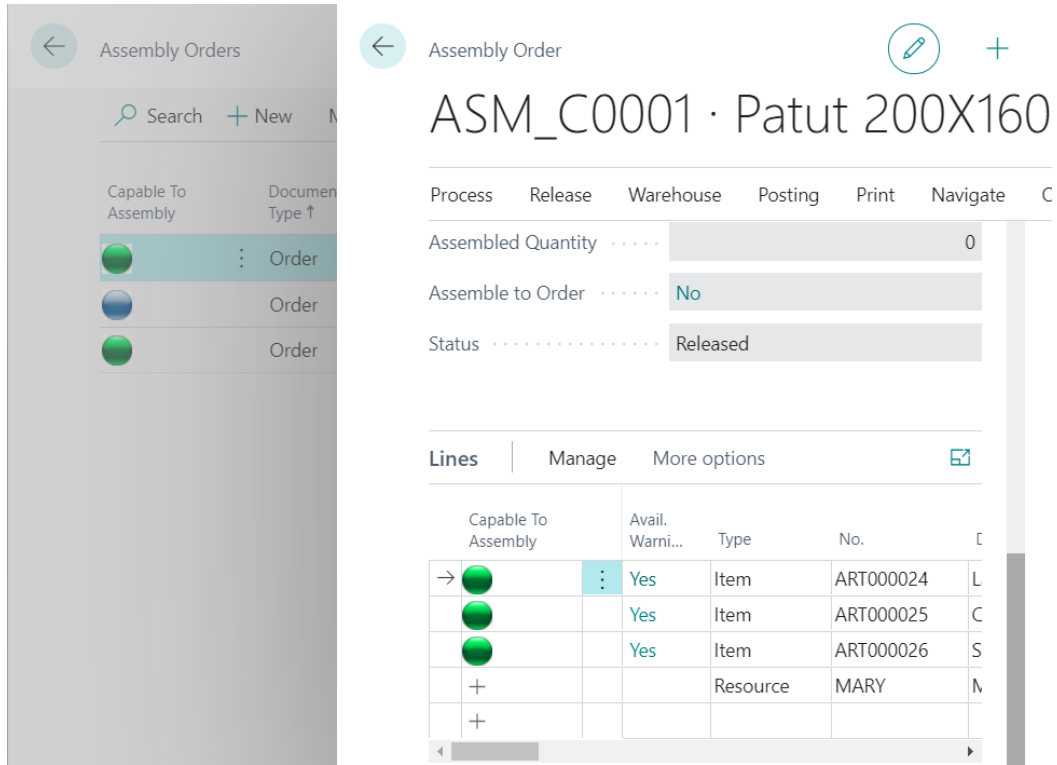


Image 9 - Assembly Order list/document