

# User Guide for Microsoft Dynamics 365 Business Central

Product: SD BI Inventory Cockpit

Release: D365 BC V19+

Revision: May 2022





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## 2 Getting Started

SD BI Inventory Cockpit allows you to alert and action on stock replenishment for items with critical, replenishment required, overstocked or short shelf-life levels.

With SD BI Inventory Cockpit, you can also monitor and generate alerts on stock items where the sales level has dropped for an item by more than a defined % against a prior period.

All this information is available directly in your Microsoft Dynamics 365 Business Central client or can be presented out to a ready-made set of Power BI Dashboards via a range of published ODATA feeds.

You can also save off your Cliff Report filters as views allowing you to easily re-run previously saved sales alert filters.





## 3 Security Setup

We have provided the following permission sets for SD BI Inventory Cockpit: SDY BICI ADMIN, SDY BICI USER and SDY BICI VIEW (*Figure 3-1*).

		@*SDY BICI*	×	
	Role ID †	Name	Extension Name	Scope †
÷	SDY BICI ADMIN	SD BI Inv. Cockpit - Admin	SD BI Inventory Cockpit	System
	SDY BICI USER	SD BI Inv. Cockpit - User	SD BI Inventory Cockpit	System
	SDY BICI VIEW	SD BI Inv. Cockpit - View	SD BI Inventory Cockpit	System

Figure 3-1

We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. Admin includes SDY BICI ADMIN permissions
- D365 BUS FULL ACCESS includes SDY BICI USER permissions
- D365 BASIC includes SDY BICI VIEW permissions





## 4 Installing SD BI Inventory Cockpit

To install **SD BI Inventory Cockpit** from the Business Administration Shell:

- 1. Run the Business Central Administration Shell as Administrator.
- 2. To publish the extension from the package file (.app), use the **Publish-NAVApp** cmdlet.

Example: Publish-NAVApp -ServerInstance BC20 -Path "C:\Users\name\Downloads\Simply Dynamics Ltd\_SD BI Inventory Cockpit\_3.2.0.0.app"

3. To synchronise the schema changes, use the **Sync-NAVApp cmdlet**.

Example: Sync-NavApp -ServerInstance BC20 -Name "SD BI Inventory Cockpit"

4. To install the published NAV App, use the **Install-NAVApp cmdlet**.

Example: Install-NAVApp -ServerInstance BC20 -Name "SD BI Inventory Cockpit"

5. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 4-1*).

								٩	Ģ	Ø	?	
Invent	TELL ME WHAT YOU WANT TO DO		2	$\times$					-			
Sales J	extension			×				2				
	Go to Pages and Tasks											
	> Extension Management	Administration		Ω	+ Sales Credit Memo	> Sales	> History					
	Didn't find what you were looking for? Try exploring					, nopona						
254	4											
		_	_	_	_	_	_	_	_	_		



6. In the **Extension Management** list, you should see the **SD BI Inventory Cockpit App** installed.





## 4.1 Allowing HttpClient Requests in SD BI Inventory Cockpit

Switching on the **Allow HttpClient Requests** option allows SD BI Inventory Cockpit to call an API that sends and returns licence key information to activate the product licence. The **Allow HttpClient Requests** option is automatically turned on on install of SD BI Inventory Cockpit.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 4-2*).

								٩	¢	Ø	?	
Invent	TELL ME WHAT YOU WANT TO DO		2	$\times$								
Sales J	extension			×				2				
	Go to Pages and Tasks											
	> Extension Management	Administration		Ω	+ Sales Credit Memo → Tasks	<ul> <li>Sales</li> <li>Reports</li> </ul>	> History					
С	Didn't find what you were looking for? Try exploring											
254	4											
1		_	-	-	_	_	_	-	-	-		

Figure 4-2

2. In the **Extension Management** list, you should see the **SD BI Inventory Cockpit** App installed (*Figure 4-3*).

🔎 Search	Manage More options		
ls Inst	Name †	Publisher	Version
Yes	Recommended Apps	Microsoft	v. 20.0.37253.38362
Yes	Sales and Inventory Forecast	Microsoft	v. 20.0.37253.38362
Yes	SD BC Data Purge	Simply Dynamics Ltd	v. 1.0.0.0
Yes	SD BI Inventory Cockpit	Simply Dynamics Ltd	v. 3.2.0.0
Yes	SD BI Sales Cockpit	Simply Dynamics Ltd	v. 3.3.0.0
Yes	SD Bulk Mailer	Simply Dynamics Ltd	v. 9.1.14.0
Yes	SD Case Manager	Simply Dynamics Ltd	v. 3.0.7.0
Yes	SD Data and GDPR Manager	Simply Dynamics Ltd	v. 3.0.1.0
Yes	SD Document Pack	Simply Dynamics Ltd	v. 3.6.0.0
Yes	SD Interface Banking	Simply Dynamics Ltd	v. 2.0.21.0
Yes	SD Interface Courier	Simply Dynamics Ltd	v. 4.0.0.0
Yes	SD Long Term Agreements	Simply Dynamics Ltd	v. 2.1.1.0
Yes	SD Trade Counter	Simply Dynamics Ltd	v. 3.0.0.0





3. Select the **SD BI Inventory Cockpit App** record and from the menu, select the **Manage** group, and choose **Configure** (*Figure 4-4*).

🔎 Search	Manage	More options				
윌 Extensio	on Marketplace	Deployme	nt Status	🔆 Uninstall	📌 Configure	1 Learn More
🕒 Upload	Extension	🖹 🇱 Install		🖮 Unpublish	Download Source	😂 Refresh
ls Inst	Name †		Publisher		Version	
Yes	Recommended	Apps	Microso	ft	v. 20.0.37253.383	62
Yes	Sales and Inver	tory Forecast	Microso	ft	v. 20.0.37253.383	62
Yes	SD BC Data Pu	ge	Simply I	Dynamics Ltd	v. 1.0.0.0	
Yes	SD BI Inventory	Cockpit	Simply I	Dynamics Ltd	v. 3.2.0.0	
Yes	SD BI Sales Coo	kpit	Simply [	Dynamics Ltd	v. 3.3.0.0	
Yes	SD Bulk Mailer		Simply [	Dynamics Ltd	v. 9.1.14.0	
Yes	SD Case Manag	ger	Simply I	Dynamics Ltd	v. 3.0.7.0	
Yes	SD Data and G	OPR Manager	Simply [	Ovnamics Ltd	v. 3.0.1.0	

Figure 4-4

4. Choose to allow the **Allow HttpClient Requests** option (*Figure 4-5*).

+ 0	✓ Saved □
Publisher	Simply Dynamics Ltd
Allow HttpClient Requ	
	+ 💼 Publisher · · · · · · · · · · · · · · · · · · ·

Figure 4-5





## 4.2 Choosing the SD BI Inventory Cockpit Role

We have provided a Role Centre for **SD BI Inventory Cockpit**. To choose the Role Centre follow the steps below:

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (*Figure 4-6*).

ventory ~ Posted Documents ~ Se						Design		- 1
les Journals Cash Receipt Journals	Transfer Orders					My Settings		-1
	ACTIONS				1	Company information	ı	
	+ Sales Quote	+ Sales Order	+ Sales Credit Memo	> Sales	> His	Assisted setup		- 18
	+ Sales Invoice	+ Sales Return Order	> Tasks	кероптя		Advanced settings		- 18
54								- 18
								 -11

Figure 4-6

Role	Sales Order Processor	•••
Company	CRONUS International Ltd.	
Work Date	30/03/2022	
Region	English (United Kingdom)	
Language	English (United Kingdom)	
Time Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, L	
Notifications	Change when I receive notifications.	
Teaching Tips		
Security		
Your last sign in was on 30/03/22 09:-	43.	
		-
	OK	cel

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon (*Figure 4-7*).





3. You should see SD BI Inventory Cockpit Manager in the list of Roles (Figure 4-8).

	Display Name	
	SD Interface Courier	
>	SD BI Inventory Cockpit	: · · ·
	Company Hub	
	SD Interface Banking	
	SD Document Pack	
	Accountant	
	Accounts Payable Coordinator	
	Accounts Receivable Administrator	
	Business Manager	
	Business Manager Evaluation	
	Service Manager	
	IT Manager	
	Sales Order Processor	
	Manufacturing Manager	
	Project Manager	•
		OK Cancel



- 4. Choose SD BI Inventory Cockpit Manager and click OK.
- 5. The **SD BI Inventory Cockpit Manager** Role should now be displayed in the **Role** field *(Figure 4-9).*

Role	SD BL Inventory Cockpit	
	So of intentory cockpit	
Company	and the second sec	
Work Date	17/05/2022	
Region	English (United Kingdom)	••••
Language	English (United Kingdom)	
Time Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, L	
Notifications	Change when I receive notifications.	
Teaching Tips		
Files		
Cloud Storage	Section 201 - 122	
Security		
Your last sign in was on 19/05/22 11:3	7.	
	OK Cano	el







## 4.3 Accessing the SD BI Inventory Cockpit Pages

Use the **Tell Me** to search for SD BI Inventory Cockpit pages. Begin typing **SD** or **BI Inventory** to see a list of the SD BI Inventory Cockpit pages (*Figure 4-10*).

bi invent		
Go to Pages and Tasks		Show less (3)
> SD BI Inventory Cockpit	Tasks	
> SD BI Inventory Cockpit Setup	Tasks	
> SD BI Inventory Cockpit Activity Panel	Tasks	
> SD BI Inventory Cockpit Item Alert List	Lists	
> SD BI Inventory Cockpit Item Alert Groups	Lists	

Figure 4-10





#### 4.4 Activating the SD BI Inventory Cockpit Licence

To use SD BI Inventory Cockpit, you must activate the licence.

- 1. From the **Tell Me**, search for and select the **SD BI Inventory Cockpit Setup** card.
- 2. When the **SD BI Inventory Cockpit Setup** card opens, you will be prompted that "Your SD BI Inventory Cockpit license needs to be validated". Choose **Yes** (*Figure 4-11*).

?	Your SD BI Inventory Cockpit license needs to be validated.	
	Yes No	



3. You will then see the **Activate your product** page.





#### 4.4.1 Activating the SD BI Inventory Cockpit Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd., in the **Activate your product** page (*Figure 4-12*):

- 1. Enter your company name in **Company Name**
- 2. Enter your company email in **Email**
- 3. Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key**. Choose **Activate**.

Activate your product	2° X
Shop	
Company Name	
Email · · · · · · · · · · · · · · · · · · ·	
Product Key	
Valid · · · · · · · · · · · · · · · · · · ·	
License Type	
Expiry Date	
COMPANY AND A MARK	16 A
Free Trial Request Subscription	Activate

Figure 4-12

4. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial.





#### 4.4.2 Activating the SD BI Inventory Cockpit Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free trial, in the **Activate your Product** page (*Figure 4-13*):

- 1. Enter your company name in Company Name
- 2. Enter your company email in Email
- 3. Choose Free Trial

Shop		
	*	
Company Name	······ <b>^</b>	
Email · · · · · · · · · · · ·	· · · · · · <b>*</b>	
Product Key		
Valid · · · · · · · · · · · · · · · · · · ·		
License Type		
Expiry Date		
The Product Key for t be used. Please conta your licence	his product has expired and the ct Simply Dynamics for a new Pr	product can no longer oduct Key to reactivate
	Free Trial Request Sub	scription Activate

Figure 4-13

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** (*Figure 4-14*).







5. The **Activate your product page** will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial (*Figure 4-15*).

Activate your p	product	$\scriptstyle \checkmark \times$
Shop		
Company Name		
Email · · · · · · · · · ·		
Product Key · · · · ·		
Valid · · · · · · · · · · · ·		
License Type	· · · · · · · trial	
Expiry Date	18/06/2022	
Activation successfu Inventory Cockpit! Your license expires	l! Thank you for using SAAS-SIMP on 6/18/2022.	-SDBICI - SD BI
	Free Trial Request Subs	cription Activate

Figure 4-15

- 6. Choose **Finish** to exit the page.
- 7. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.





## 5 Uninstalling SD BI Inventory Cockpit

You can uninstall **SD BI Inventory Cockpit** using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 5-1*).

							٩	Q	Ø	?	
TELL ME WHAT YOU WANT TO DO		2	$\times$								
extension			×				2				
Go to Pages and Tasks			_								
> Extension Management	Administration		П	+ Sales Credit Memo	> Sales	> History					
Didn't find what you were looking for? Try exploring			_		7 hepona						
4											

Figure 5-1

- 2. In Extension Management, you should see the SD BI Inventory Cockpit App installed.
- 3. Select the SD BI Inventory Cockpit App and choose the Uninstall Action (Figure 5-2).

🔎 Search Details 🛛 N	lanage 🚺 Open in Excel Action	ns Fewer options	\ ≡
📲 Install 🕃 Uninstall	Configure 📑 Download Source	e 🕕 Learn More 🛛 🔀 Refresh	众
Description	Nama *	Version	

Figure 5-2





## 6 Using SD BI Inventory Cockpit

Once installation is complete, you can begin to monitor and alert on stock items where the sales level has dropped by more than a defined % against a prior period you select. You can also alert and action stock replenishment for items with critical, replenishment required, overstocked or short shelf-life levels in SD BI Inventory Cockpit.

#### 6.1 Setup

The SD BI Inventory Cockpit Setup page is accessed by searching for the SD BI Inventory Cockpit Setup page in the Tell Me or by drilling through on the Setup Action in the SD BI Inventory Cockpit Manager Role Centre (*Figure 6-1*).



Figure 6-1





In the **SD BI Inventory Cockpit Setup** page, expand the **General** FastTab. The **General** FastTab contains the following fields (*Figure 6-2*):

Process About Related				
Inventory Cockpit Enabled				
General				Show le
Last II C Entry No.	667	Cliff Reports Implem	Standard	~
Last ILE Entry No.				

Figure 6-2

- Inventory Cockpit Enabled Select this option if you want to enable the Inventory Cockpit functionality in SD BI Inventory Cockpit.
- Last ILE Entry No. This field is used in the Item Sales Alerts/Cliff Report calculations and displays the Last ILE Entry No that was used in the calculations. This field is used to do an incremental refresh on calculations.
- Comprehensive Rebuild Select this field if you want to rebuild the Item Sales Alerts/ Cliff Report from scratch again and disregard the value in the Last ILE Entry No. field.

Note: A Comprehensive Rebuild can take some amount of time to run, depending on the size of your Item Ledger Entry table.

- Cliff Reports Implementation This field specifies the Codeunit to use in the Item Sales Alerts/ Cliff Report. Here a Standard interface is defined to select the Codeunit ID in the background. This allows for easy creation of extensions if needed for specific bespoke requests. The Cliff Reports Handler Codeunit contains the logic used to run the cliff reports and generate the item sales alerts.
- Inventory Implementation This field specifies the Codeunit to use in the Inventory Alerts. Here a Standard interface is defined to select the Codeunit ID in the background. This allows for easy creation of extensions if needed for specific bespoke requests. The Inventory Alerts Handler Codeunit contains the logic used to run the inventory alerts.





The inventory alerts look at your sales activity in the item ledger entry for the last number of days specified in the **Sales Period History** field and calculates the sales and requirements for this time period. The daily average stock requirement for each item is calculated. In the **Item Alerts** FastTab you define the settings that will be used when calculating the Inventory Alerts (*Figure 6-3*):

Process About Polated			
Process About Related			
Item Alerts			
Default Calc. Parameters		Alert Exclusions	
Sales Period History	365	Ignore Blank	
Sales Max Days Stock	5	Ignore Fixed Reorder	
Default Lead Time Ca 2D		Ignore Maximum Qty. 🔹 🌒	
Default Safety Lead T 2D		Ignore Order	
Update Items by Category		Ignore Lot-for-Lot	
Default Ordering		Expiry Alerts	
Exclude Safety Stock		Shelf Life to Shelf Lif	50
Action Order Stock A Target Stoc	k 🗸		
Req. Worksheet Tem REQ.	$\sim$		



- Sales Period History Days The inventory alerts look at your sales activity in the item ledger entry for the previous number of days specified in the Sales Period History Days and calculates the sales and requirements for this time period. The Sales Period History Days is used to calculate the daily average stock requirement for each item. The Sales Period Daily Average stock requirements is calculated as Sales Period Qty/Sales Period History Days.
- Sales Max Days Stock Indicates the maximum sale days of stock that can be held before alerting the item as overstocked. The Maximum Amount of Stock is calculated as Sales Max Days Stock \* Sales Period Daily Average.
- **Default Lead Time Calculation** Enter a value to use for Lead Time calculations where there is no Lead Time for the item entered on the Item Card. The Lead Times are used to calculate **Target Stock**. When calculating lead times, SD BI Inventory Cockpit looks first to the Item Card then, if no lead time exists on the Item Card, to the Managed





Groups, and then, if there is no lead time defined on the Managed Group, to the SD BI Inventory Cockpit Card.

Target Stock is calculated as the Lead Time in Days \* Sales Period Daily Average.

 Default Safety Lead Time Used – Enter a value to use for Safety Lead Time calculations where there is no Safety Lead Time for the item entered on the Item Card. The Safety Lead Times are used to calculate Target Stock. When calculating lead times, SD BI Inventory Cockpit looks first to the Item Card then, if no safety lead time exists on the Item Card, to the Managed Groups, and then, if there is no safety lead time defined on the Managed Group, to the SD BI Inventory Cockpit Card.

Target Stock is calculated as the Lead Time in Days \* Sales Period Daily Average.

 Exclude Safety Stock from Free Stock – Safety stock is stock that acts as a buffer to reduce the risk of an item becoming out of stock. Choosing this option excludes Safety Stock from the Free Stock (available stock) calculation. The Safety Stock for an Item is defined on the Item Card.

If the Exclude Safety Stock from Free Stock option is selected, then Free Stock is calculated as Inventory + Quantity on PO – Quantity on SO - Safety Stock.

If the Exclude Safety Stock from Free Stock option is not selected, then Free Stock is calculated as Inventory + Qty. on PO - Qty. on SO.

 Action Order Stock Alerts – This option allows you to choose how SD BI Inventory Cockpit should calculate Order Stock Item Alerts. Options are TargetStock or FreeStock.

If **Target Stock** is chosen, then if **Free Stock < Target Stock** and **Order Alert** is flagged and if **Free Stock < 0** then a **Critical Order Alert** if flagged for the item. The **Order Qty.** on the alert line is set to the **Target Stock – Free Stock**.

If **Free Stock** is chosen, then if **Free Stock < 0** an **Order Alert** and a **Critical Order Alert** is flagged for the item. The **Order Qty**. on the alert line is set to the **Free Stock**.

• **Req. Worksheet Template** – Choose the Requisition Worksheet Template to use when choosing the **Populate Requisition** action in the **SD BI Inventory Cockpit Alerts List**.





- **Req. Worksheet Batch** Choose the Requisition Worksheet Batch to use when choosing the **Populate Requisition** action in the **SD BI Inventory Cockpit Alerts List**.
- Ignore Blank Choose this option if you want to exclude those items from the alert calculations that have the Reordering Policy on the Item card set to Blank. If this option is selected, the Alerts for Order Stock, Over Critical, Overstock are not created as the value for Free Stock is not calculated.
- Ignore Fixed Reorder Qty. Choose this option if you want to exclude those items from the alert calculations that have the Reordering Policy on the Item card set to Fixed Reorder Qty. If this option is selected, the Alerts for Order Stock, Over Critical, Overstock are not created as the value for Free Stock is not calculated.
- Ignore Maximum Qty. Choose this option if you want to exclude those items from the alert calculations that have the **Reordering Policy** on the Item card set to Maximum Qty. If this option is selected, the Alerts for Order Stock, Over Critical, Overstock are not created as the value for Free Stock is not calculated.
- **Ignore Order** Choose this option if you want to exclude those items from the alert calculations that have the **Reordering Policy** on the Item card set to **Order**. If this option is selected, the Alerts for Order Stock, Over Critical, Overstock are not created as the value for Free Stock is not calculated.
- Ignore Lot-for-Lot— Choose this option if you want to exclude those items from the alert calculations that have the Reordering Policy on the Item card set to Lot-for-Lot. If this option is selected, the Alerts for Order Stock, Over Critical, Overstock are not created as the value for Free Stock is not calculated.
- Shelf-Life Volume Alert % This field is used in the Shelf-Life Alert calculations. SD BI Inventory Cockpit looks at open, positive, Item Ledger Entries where the expiration date is not empty. When the item is posted to the Item Ledger Entry, the Item's Expiration Date should be greater than the Posting Date.

A Short Life Alert is flagged and the Short Life Qty and Short Life Amount LCY are calculated for an Item if the Work Date is >= (ILE.Expiration Date - (ROUND (ILE.Expiration Date - ILE.Posting Date) \* (Shelf-Life Volume Alert %/100) ))

So, if you wanted to calculate the Short Life Alerts for an item when it was approaching halfway or more to its Expiration Date, you would enter 50 in the Shelf Life Min. Volume % field.





In the **Default Cliff Alert Period Settings** FastTab, you define the default alert settings that will be set when creating **new Views** in the **Item Cliff Alerts/Cliff Report** page. These Default Alert Period Settings specify the filters that you want to use to generate alerts for customers, whose average sales in a particular period have dropped by a certain percentage, when compared against their average sales in another period (*Figure 6-4*):

Item Alerts >					
Default Cliff Alert Peri	od Settings				
Default Alert Period	Ionth	$\sim$	Default Sales Drop %		5.
Compare average of					
Start Period	lar-2022		End Period	Apr-2022	
Against average of					
	an-2022		End Period	Feb-2022	
Start Period					



- **Default Alert Period** Select a Default Alert Period to base the Cliff Report calculations on. Select from a list containing **Year**, **Quarter**, **Month**, or **Week**.
- **Default Sales Drop %** Select a Default Sales Drop % to base the Cliff Report Calculations on.
- Compare average of Start Period Select a Start Period from a lookup list.
- End Period Select an End Period from a lookup list.
- Against average of Start Period Select a Start Period from a lookup list.
- End Period Select an End Period from a lookup list.





In the **Default Minimum Cliff Sales Filters** FastTab, you define the default minimum sales filters that will be set when creating **new Views** in the **Item Cliff Alerts** page. You define the Items to exclude from the query where the Minimum Sales Amount for the Item is below a certain threshold in a particular period (*Figure 6-5*):

Default Min. Sales Am	100.00	The system excludes item categories from the query where
Default Filter Period T Month	$\sim$	revenue in period war-2022 is below 100 ECT
ilter Period Mar-2022		



- **Default Min. Sales Amount** Specify the Minimum Sales Amount below which an item will be excluded from the Cliff Report query.
- **Default Filter Period Type** Select a Default Filter Period Type to exclude from the Cliff Report query. Select from a list containing **Year**, **Quarter**, **Month**, or **Week**.
- **Default Filter Period** Select a Default Filter Period to exclude from the Cliff Report query.

There are two actions available from the **Related** menu group (*Figure 6-6*):





• Web Services – Choose this action to open the standard Dynamics 365 Business Centre Web Services page (*Figure 6-7*). When this action is selected for the first time, SD BI Inventory Cockpit publishes 6 web services that can be used to build Power BI Reports. These 6 web services are used to feed a ready-made set of Power BI Dashboards.





Neb Services				~	Saved	Ц	Ľ
✓ Search +	New 🐺 Ed	lit List 🔟 Delete	e 🛃 Reload	More options		Ŀ	$\nabla$
Object Type †	Obje	ect ID Object Name	2	Service Name 1	All Ten	Pub	ODa <sup>,</sup>
Page	4300	6367 Gen. Produ	ict Posting Groups	SDY BICI OD Gen Pr. Post. Grp		✓	http
Page	4300	6368 Item Categ	ories	SDY BICI OD Item Category			http
Page	4300	6369 Item Ledge	er Entry	SDY BICI OD Item Ledger Entry			http
Page	4300	6370 Item List		SDY BICI OD Item List			http
Page	4300	6371 Locations		SDY BICI OD Location			http
Page	4300	6372 Value Entri	es	SDY BICI OD Value Entries			http



 Job Queue Entries – Choose this action to create a Job to refresh the SD BI Inventory Cockpit data. To avoid processing overheads, this Job is set to run during weekdays at 5 a.m. (*Figure 6-8*). Alternatively, you can choose the Refresh action button on the SD BI Inventory Cockpit Role Centre during the day to refresh the data.

(j)	The SD BI Inventory Cockpit will create a job that runs 5:30 AM during weekdays to refresh the Inventory Cockpit data. Please ensure to "Set Status to Ready".
	ОК

Figure 6-8





## 6.2 Managed Items List – Inventory Alerts

The Inventory Alerts list is accessed from the **SD BI Inventory Cockpit Role Centre** by drilling through on the **Managed Items** cue or by searching the Tell Me.

Here you can Rebuild and Refresh the Critical Order, Reorder, Overstock and Short Life Alerts. On installation of SD BI Inventory Cockpit, the Managed Items List is empty. Choose **Rebuild Alerts** to populate the list with your Items and to create the Alerts (*Figure 6-9*).

> Search BY Edit Lis	Rebuild Alerts	Refresh Aler	ts 👔 Popu	ate Requisition	K View Ke	equisition	Item Card
			Item Alerts		ltem		
Views	X		ltem		Alerts		
		Item Alerts	Category	Item Alerts	Order	Suggestee	d



- **Rebuild Alerts** The Managed Items List is cleared, the Items reinserted into the Managed Items table and the Alerts are recalculated.
- **Refresh Alerts** Only the Alert calculations are recalculated.

You can also easily Populate a Requisition Worksheet and View existing Requisition Worksheets (*Figure 6-10*).

✓ Searce	h 📑 Edit List	F Rebuild Alerts	🛃 Refresh Alerts	Popu	ate Requisition	胶 View Re	equisition	🔳 Item Card
Views		×	1 Al	Item Alerts Item	1. AL. 4	ltem Alerts		
All		:	Reordering Policy	Category Code	Order Critical	Alert	Alerts Qt	y Alert Action Qt



• **Populate Requisition** - A record is inserted into the Requisition Worksheet for those lines where the user has set the Alert Action Qty. greater than 0 (*Figure 6-11*).





Ç	Search	📴 Edi	t List	F Rebuild Alerts	🛃 Refresh	Alerts	🚡 Populate Req	uisition	🖹 Vie	w Requisition	💵 Iter	m Card	
	Item Alerts Item No.		ltem A	lerts Description	ltem Alerts Vendor No.	Item Al	erts Vendor Name	Item Alerts Reordering Policy		Item Alerts Item Category Code	ltem Alerts Order Alert	Suggested Alerts Qty	Alert Action Qty
$\rightarrow$	<u>1988-S</u>	÷	SEOL	JL Guest Chair, red	20000	First U	p Consultants			CHAIR		11	1
	1972-S		MUN	ICH Swivel Chair, yell	30000	Graph	ic Design Institu			CHAIR		6	6
	1996-S		ATLA	NTA Whiteboard, base	30000	Graph	ic Design Institu			MISC		3	3
	1900-5		PARIS	Guest Chair, black	20000	First U	n Consultants			CHAIR		1	1

Figure 6-11

• View Requisition – Choose this option to open existing Requisition Worksheets (*Figure 6-12*).

Name · · ·					[	DEFAULT			
Manage	Proces	s Report	Drop Shipm	ent Special	Order Line Item Availability by	More ont	ions		
wanage	THOCE.	а перот	Drop Sniphi	ent opeciai	order Line item Availability by	wore opt	10113		
			A -+!	Accept		Original		Unit of	
Туре		No.	Message	Message	Description	Quantity	Quantity	Measure Code	Direct Unit Cost
Item		1900-S	New		PARIS Guest Chair, black		1	PCS	97.50
Item		1972-S	New		MUNICH Swivel Chair, yellow		6	PCS	96.10
		1988-S	New	~	SEOUL Guest Chair, red		11	PCS	97.50
Item									

Figure 6-12





#### Factboxes provide further details on the Alerts raised (Figure 6-13).

Stock	
Inventory	-8
Qty. on Sales Order	1
Qty. on Purch. Order	8
Stock Free	-1
Stock Target	3.99
Stock Target Cost	389.025
Stock Max	2.85
Sales	
Sales Period History Days	7
Sales Period Qty	4
Sales Period Daily Average	0.57
Sales Max Days Stock	5
Replenish	
Stock Safety Lead Time Days	5
Stock Supplier Lead Time Days	2
Stock Total Lead Time Days	7
Item No.	1900-S

Figure 6-13





## 6.3 Item Alert Groups

The Item Alert Groups list is accessed from the **SD BI Inventory Cockpit Role Centre** by drilling through on the **Managed Groups** cue or by searching the Tell Me.

The Managed Groups List is a list of the Item Category Codes for the Items in the Managed Items List. Here you can define Lead Time and Safety Lead Time values to use in the Item Alert calculations if these values do not exist on the Item Card. You can also define the Sales Period History Days and the Sales Max Days Stock values to use in calculations for specific Item Categories rather than using the values defined on the SD BI Inventory Cockpit (*Figure 6-14*).

	-								
	🔎 Search 🛛 🐺 E	dit L	ist						67 🗉
	ltem Category Code ↑		Sales Period History Days	Sales Max Days Stock	Lead Time Calculation	Safety Lead Time	Items Active	Items Blocked	Target Stock Cost
-	→ <u>CHAIR</u>	:	60	5	4D	2D	10	0	223.51
	DESK		60	5	1W	2D	0	0	0.00
	FURNITURE		30	7	4D	2D	0	0	0.00
	MISC		60	5	2D	2D	2	0	98.21
	SUPPLIERS		60	3	4D	2D	0	0	0.00
	TABLE		0	0	2D	2D	5	1	0.00

Figure 6-14





#### 6.4 Item Cliff Alerts

The Item Sales Alerts/Cliff Report page is accessed from the **SD BI Inventory Cockpit Role Centre** by drilling through on the **Item Cliff Alerts** cue.

To help you get started, an **Initial View** is created on installation. With SD BI Inventory Cockpit, you can generate Item Sales Alerts for drops in sales value activity (Cliff Report) comparing variable periods. The **Item Cliff Alerts** page contains the following fields in the **Alert Period Settings** FastTab (*Figure 6-15*):

Process Report Views				
🗒 Refresh 🛛 👌 Ignore List	🔣 Send To Excel			
Alert Period Settings				
Alert Period	Month	$\sim$	Sales Drop % · · · · · · · ·	5.0
Alert Type	Average	$\sim$	Default View	
Refresh Required				
Compare average of				
Start Period	Mar-2022		End Period Apr-2022	
Against average of				
Start Period	Jan-2022		End Period Feb-2022	
			The system creates alerts for items where average sales in period Mar	r-



- Alert Period Select an Alert Period. Select from a list containing Year, Quarter, Month, or Week.
- Alert Type Select an Alert Type. Fixed or Average.

When choosing **Fixed** you are creating alerts for items whose sales have dropped by the **Sales Drop %** from one period to the next.

When choosing **Average** you are creating alerts for items whose average sales in one period when compared against the average sales in another period have dropped by





the **Sales Drop %.** E.g., comparing the Average of Jan to Feb sales against the average of Mar to Apr sales.

- Sales Drop % Select a Default Sales Drop % to base Cliff Report Calculations on.
- **Default View** Choose this option if you want this View to display by default when you open the Item Sales Alerts page.
- **Refresh Required** This option is set to true if any of the filter fields in the Item Sales Alerts page are updated after the alerts are calculated. This notifies the user that the Item Sales Alerts need to be refreshed.
- Compare average of Start Period Select a Start Period from a lookup list.
- **Compare average of End Period** Select an End Period from a lookup list.
- Against Average of Start Period Select a Start Period from a lookup list.
- Against Average of End Period Select an End Period from a lookup list.

In the **Minimum Sales Filters** FastTab, you can define the default minimum sales filters that will be applied when generating alerts in the Item Sales Alerts page. You define the Items to exclude from the query where the Item's Minimum Sales Amount is below a certain threshold in a particular period (*Figure 6-16*):

		100.00	is below 100 (LCV)
Iter Period Type	Year	$\sim$	is below too (ECT)
Iter Period	Year 2022		



- Minimum Sales Amount (LCY) Specify the Minimum Sales Amount below which an item will be excluded from the Cliff Report query.
- Filter Period Type Select a Period Type. Select from a list containing Year, Quarter, Month, or Week.
- **Default Filter Period** Select a Filter Period where the revenue in this period is below the **Minimum Sales Amount (LCY)**.





From the **Views** menu group, you can choose to save off the current view to use again, create another view, or open an existing view (*Figure 6-17*). When you choose to create a New View, the View is created with the default values from the SD BI Inventory Cockpit.

SD BI Inventory (	Cockpit Item Cliff Alerts	S		
Quarter				
Process Re	port <u>Views</u>			
💥 New View	🕑 Set As Default	😽 Save View As	🕈 Open View	🗓 Delete a View

Figure 6-17

From the **Report** menu group, you can print the **Customer/Item Sales** report, the **Customer-Top 10** report, the **Inventory – Top 10 report** and the **Vendor/Item Purchases** report (*Figure 6-18*).

$\leftarrow$	SD BI Inventory Cockpit Item	Cliff Alerts		Ø L
	Quarter			
	Process <u>Report</u> View	NS		
	🖬 Customer/Item Sales	🖬 Customer - Top 10	🖬 Inventory - Top 10	Vendor/Item Purchases



When you are ready to calculate the Customer Alerts, from the **Process** menu group, choose **Refresh** (*Figure 6-19*).









The Item Alerts are displayed. Those Items flagged as on Alert have their Item No. and Item Description highlighted in red. Periods where sales have dropped off from the previous period have the values highlighted in red and periods where sales have improved from the previous period have the values highlighted in green (*Figure 6-20*).

Initiai				$\bigcirc$			
Process Report View	WS						
	_						
🧱 Refresh 🛛 👌 Ignore Li	ist 🛛 🗱 Send To Excel						
Alert Period	Month		✓ Sales Drop S	% • • • • • • • • • • • • •			
Alert Type	Fixed		✓ Default View	v			
Refresh Required							
Compare average of							
Start Period	Mar-2022		··· End Period				
Against average of							
Start Period	Feb-2022		End Period				
				5			
Item Cliff Alerts	Manage	d _ <b>II</b> , Tooola Show All/Alast	🕅 Japore Line				E
Item Cliff Alerts <sup>3<sup>ag</sup></sup> New Line <sup>3</sup> Delete	Manage Line 💙 Toggle Expand	i 🕰 Toggle Show All/Alert	i Ignore Line				E
Item Cliff Alerts	Manage Line Stoggle Expand	Toggle Show All/Alert	Ignore Line	May-2022	Apr-2022	Mar-2022	یے Feb-2022
Item Cliff Alerts ⇒ <sup>10</sup> New Line → Delete Iter → ± : CB	Manage Line ≈ Toggle Expand m Category Item No.	Toggle Show All/Alert	Ignore Line Percentage 60.26	May-2022 <b>2,476.80</b>	Apr-2022 <b>3,100.50</b>	Mar-2022 <b>3,978.00</b>	Feb-2022 2,482.20
Item Cliff Alerts ⇒ <sup>0</sup> New Line ≫ Delete Hter → ± i Stt _ CH	Manage       Line     ➤ Toggle Expand       m Category     Item No.       SAIR     _       HAIR     1900-5	Toggle Show All/Alert Item Description - PARIS Guest Chair, black	Ignore Line Percentage 60.26 60.00	May-2022 2,476.80 750.60	Apr-2022 3,100.50 0.00	Mar-2022 3,978.00 1,000.80	Feb-2022 2,482.20 625.50
Item Cliff Alerts ⇒ <sup>0</sup> New Line ≫ Delete → ± i GH _ CH _ CH	Manage       Line     ➤ Toggle Expand       m Category     Item No.       SAIR     _       HAIR     1900-5       HAIR     1908-5	Item Description - PARIS Guest Chair, black LONDON Swivel Chair, bl	Ignore Line  Percentage  60.26  60.00  ue  100.00	May-2022 2,476.80 750.60 493.20	Apr-2022 3,100.50 0.00 616.50	Mar-2022 3,978.00 1,000.80 0.00	Feb-2022 2,482.20 625.50 369.90
Item Cliff Alerts       ⇒ <sup>0</sup> New Line       → ±       i       CH       _       CH       _       CH       _	Manage Line ≈ Toggle Expand m Category Item No. JAIR – IAIR 1900-S IAIR 1908-S IAIR 1968-S	Item Description - PARIS Guest Chair, black LONDON Swivel Chair, black		May-2022 2,476.80 750.60 493.20 1,233.00	Apr-2022 3,100.50 0.00 616.50 0.00	Mar-2022 3,978.00 1,000.80 0.00 986.40	Feb-2022 2,482.20 625.50 369.90 493.20
Item Cliff Alerts           ⇒ <sup>0</sup> New Line         ⇒ Delete           → ±         : CH           -         CH           -         CH           -         CH           -         CH           -         CH           -         CH	Manage Line ≈ Toggle Expand m Category Item No. JAIR – IAIR 1900-5 IAIR 1908-5 IAIR 1968-5 IAIR 1972-5			May-2022 2,476.80 750.60 493.20 1,233.00 0.00	Apr-2022 3,100.50 0.00 616.50 0.00 1,233.00	Mar-2022 3,978.00 1,000.80 0.00 986.40 739.80	Feb-2022 2,482.20 625.50 369.90 493.20 493.20

Figure 6-20

The **Percentage** column shows the percentage value of the decrease between the columns under comparison and is calculated using the following: Decrease % = = (New Value - Original Value ) / Original Value \*100.

You can expand on the Item Category record in the Item Cliff Alerts to see the details of the Cliff Report lines split out by Item Category Code. Values for items with no Item Category Code are not displayed.





#### 6.5 SD BI Inventory Cockpit and Power BI

Dynamics 365 Business Central offers two ways to expose data that can be consumed by Power BI reports - API pages and OData (Open Data Protocol) web services.

The data in SD BI Inventory Cockpit can be presented out to a ready-made set of Power BI Dashboards via ODATA Feeds. SD BI Inventory Cockpit contains 6 pages published as OData Webservices (*Figure 6-21*).

🔎 Sea	rch 🕂 New	🐯 Edit List	<u>i</u> Delete 😂 Reload	More options		Ŕ	$\mathbb{Y}$
Obje ↑	t Type	Object ID	Object Name	Service Name ↑	All Ten	Pub	ODat
Page	•	43006367	Gen. Product Posting Groups	SDY BICI OD Gen Pr. Post. Grp			http
Page	)	43006368	Item Categories	SDY BICI OD Item Category		~	http
Page	2	43006369	Item Ledger Entry	SDY BICI OD Item Ledger Entry			http
Page	9	43006370	Item List	SDY BICI OD Item List		~	http
Page	9	43006371	Locations	SDY BICI OD Location		~	http
Page	2	43006372	Value Entries	SDY BICI OD Value Entries			http

Figure 6-21

The standard Microsoft Dynamics 365 Business Central Power BI Report FactBox is also embedded in the SD BI Inventory Cockpit Role Centre. If you have a Power BI licence, you can choose to use the standard Microsoft Dynamics 365 Business Central Power Setup Power BI Reports wizard to display your published Power BI reports in Business Central (*Figure 6-22*):





entory Alerts Actions									
<sup>tem Cliff</sup> Alerts 16	Managed Groups	Managed Items	Critical Order	Reorder 6	Overstock Count	Overstock Am LCY 30,992.02	Short Life Amo LCY 26.25	Setup	Refresh
	- <u>-</u>	>	>	>		>	>		
1.25M	78.072	Not Straph Stor Storad Stora							
2015 Curry DOLL'S TALCH VIII 120 MIN 1215 111 400 MIN 1215 112 400 MIN 1215 113 400 MIN 1215 114	Not Daniel		tention						

Figure 6-22

We can provide you with a ready-made set of Power BI Dashboards fed via the ODATA Feeds above (*Figure 6-23*).



Figure 6-23



## IT Simply Makes Business Sense with Microsoft Dynamics 365



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