User Guide for Microsoft Dynamics 365 Business Central

Product: SD BI Sales Cockpit

Release: D365 BC V19+

Revision: May 2022

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2 Getting Started

SD BI Sales Cockpit allows you to manage your critical Sales KPIs in both your Microsoft Dynamics 365 Business Central ERP client and in Power BI providing you with ready-made KPIs and Power BI Dashboards.

SD BI Sales Cockpit allows you track and display, either at Manager or Salesperson level, your sales cycle activity for Quotes and Orders. Users are forced to log a lost reason code on quotes before they are deleted. This enables you to Log Quotes: created by period by salesperson; won by period by salesperson; and lost by period by salesperson. You can also track historic Sales Quote and Sales Order activity.

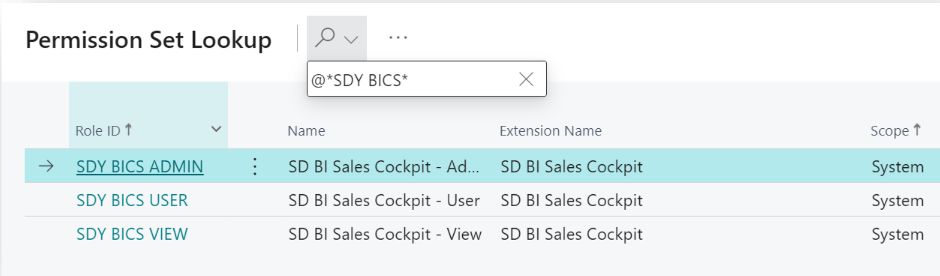
With SD BI Sales Cockpit, you can generate Customer Alerts for drops in sales value activity (Cliff Report) comparing variable periods – with the activity analysed down to item category level. The Customer Alerts are colour coded to highlight those customers with drops in sales.

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

All the above data can be presented out to a ready-made set of Power BI Dashboards via ODATA Feeds.

3 Security Setup

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


Permission Set Lookup

@*SDY BICS*

Role ID	Name	Extension Name	Scope
SDY BICS ADMIN	SD BI Sales Cockpit - Ad...	SD BI Sales Cockpit	System
SDY BICS USER	SD BI Sales Cockpit - User	SD BI Sales Cockpit	System
SDY BICS VIEW	SD BI Sales Cockpit - View	SD BI Sales 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 BICS ADMIN permissions
- D365 BUS FULL ACCESS includes SDY BICS USER permissions
- D365 BASIC includes SDY BICS VIEW permissions

Note: Even if you have SUPER permission, you will need to be explicitly assigned one of the SD BI Sales Cockpit permission sets to access the functionality.

4 Installing SD BI Sales Cockpit

To install **SD BI Sales 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 Sales Cockpit_3.3.0.0.app"

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

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

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

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

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

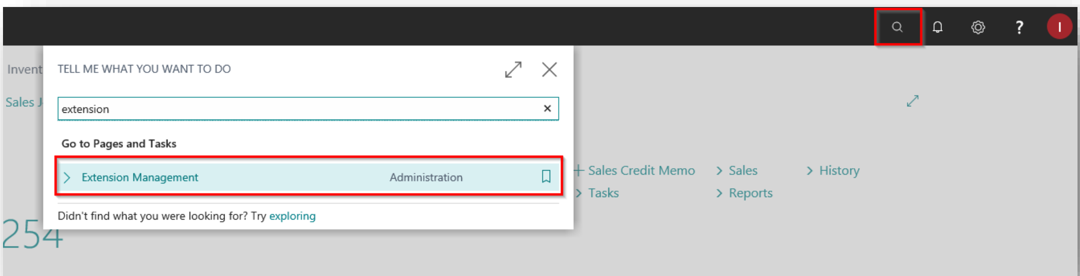


Figure 4-1

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

4.1 Allowing HttpClient Requests in SD BI Sales Cockpit

Switching on the **Allow HttpClient Requests** option allows SD BI Sales 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 Sales Cockpit.

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

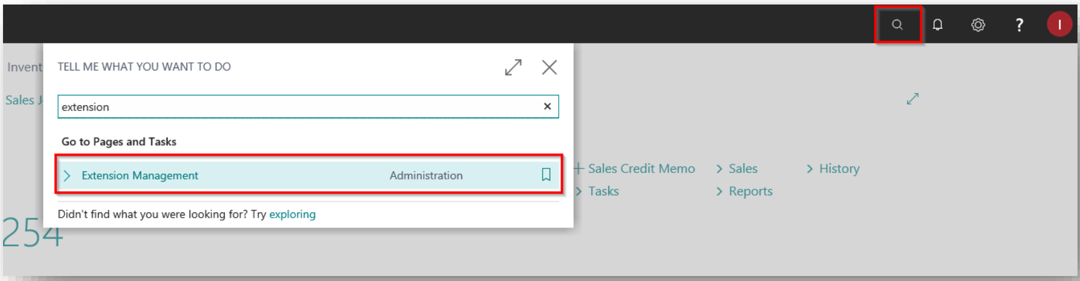


Figure 4-2

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

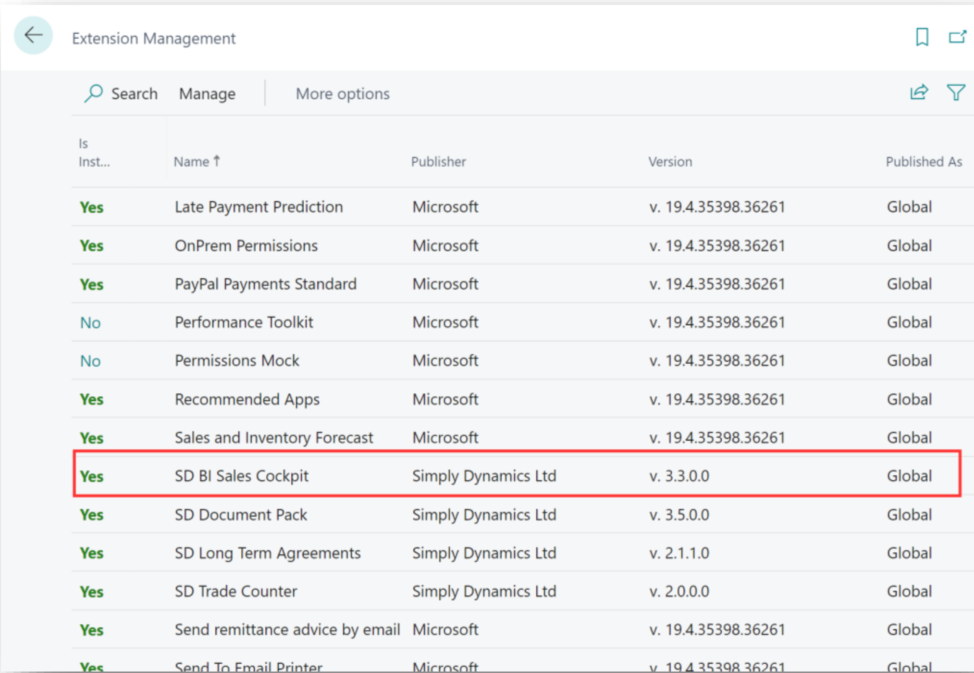


Figure 4-3

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

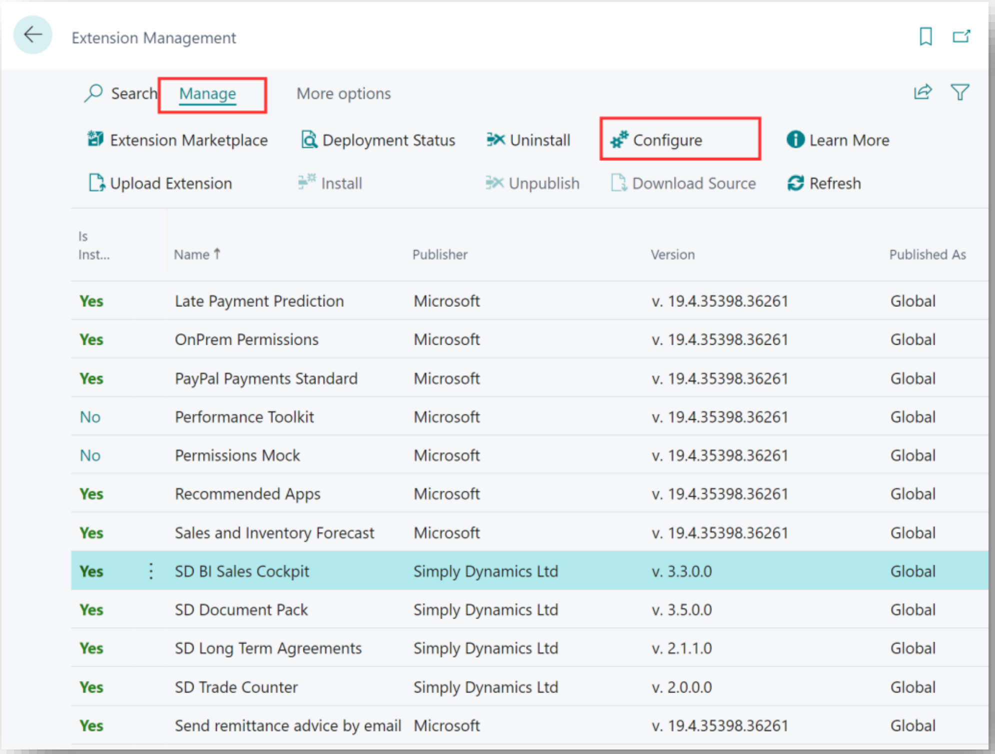


Figure 4-4

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

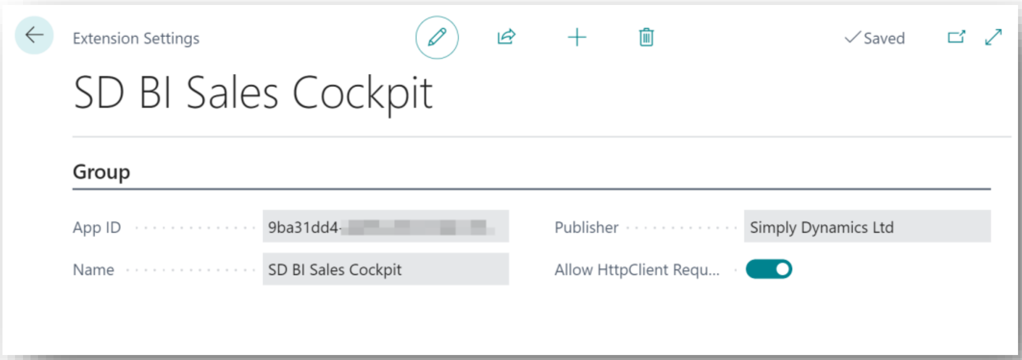


Figure 4-5

4.2 Choosing the SD BI Sales Cockpit Role

We have provided two Role Centres for **SD BI Sales Cockpit**: a **Manager** Role Centre and a **User** Role Centre. In the example below, we will select the Manager Role Centre.

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)*.

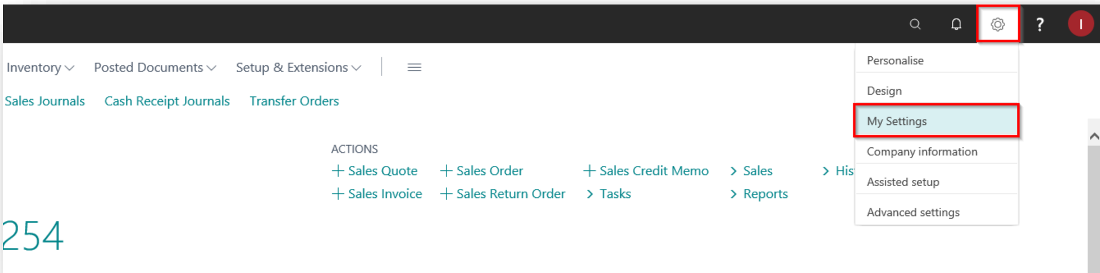


Figure 4-6

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

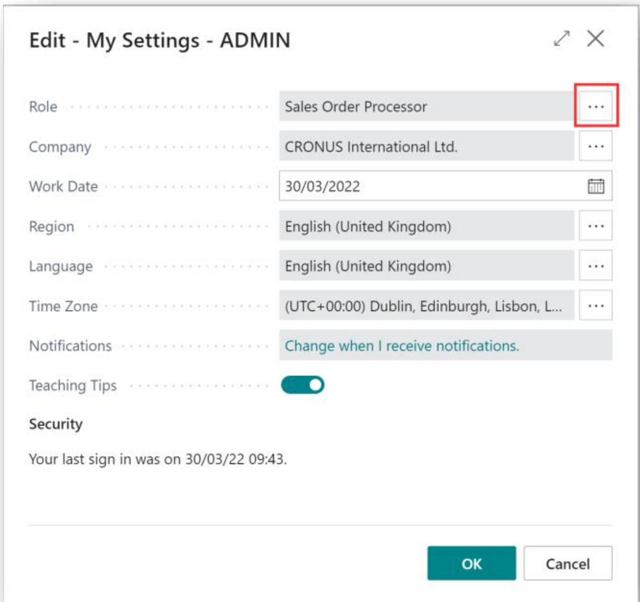


Figure 4-7

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

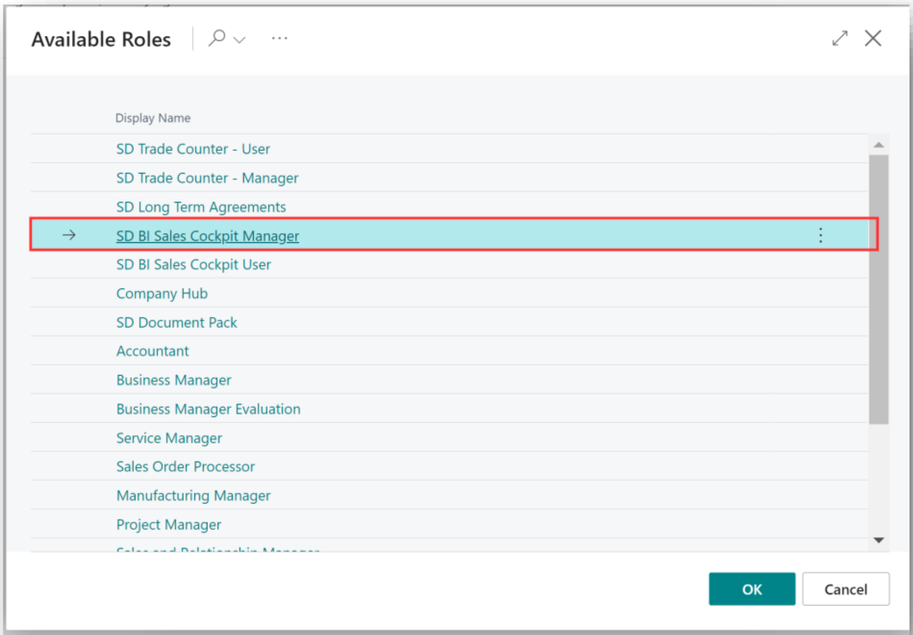


Figure 4-8

4. Choose **SD BI Sales Cockpit Manager** and click **OK**.

5. The **SD BI Sales Cockpit Manager** Role is now displayed in the **Role** field *(Figure 4-9)*.

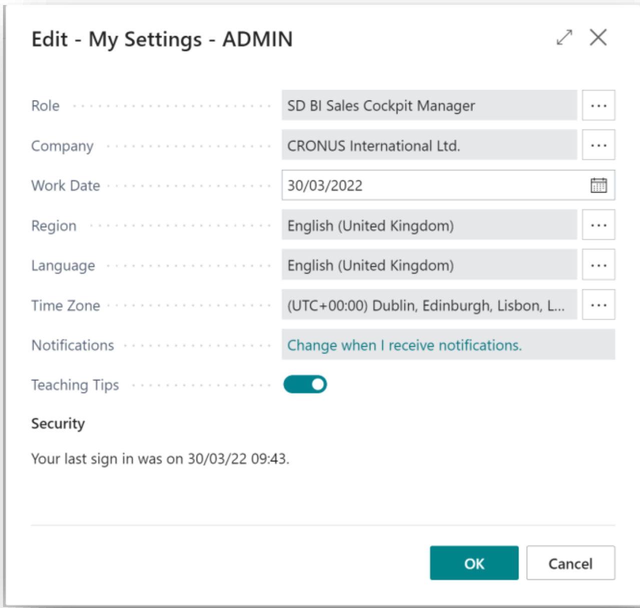


Figure 4-9

4.3 Accessing the SD BI Sales Cockpit Pages

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

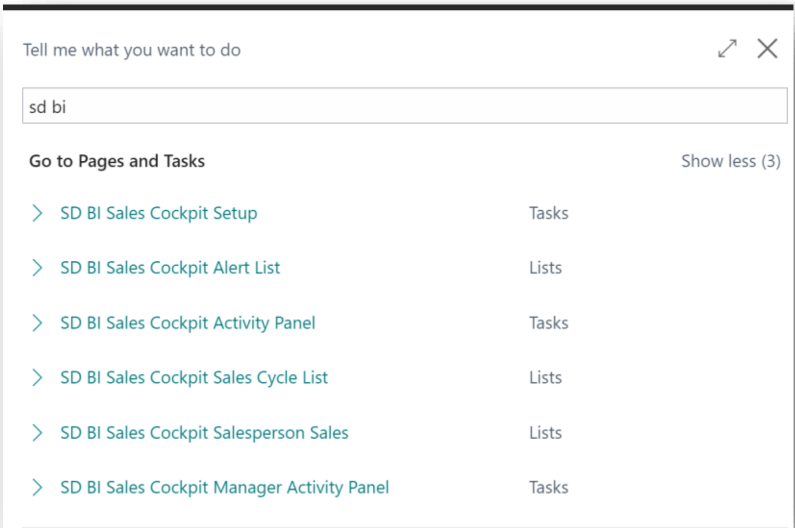


Figure 4-10

4.4 Activating the SD BI Sales Cockpit Licence

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

1. From the **Tell Me**, search for and select the **SD BI Sales Cockpit Setup** card.

2. When the **SD BI Sales Cockpit Setup** card opens, you will be prompted that You will be prompted that "Your license is invalid." Choose **OK** *(Figure 4-11)*.

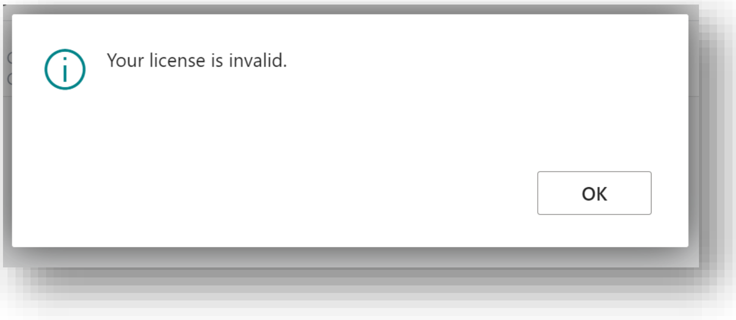


Figure 4-11

3. You are then prompted that "Your SD BI Sales Cockpit Setup license needs to be validated." Choose **Yes** *(Figure 4-12)*.

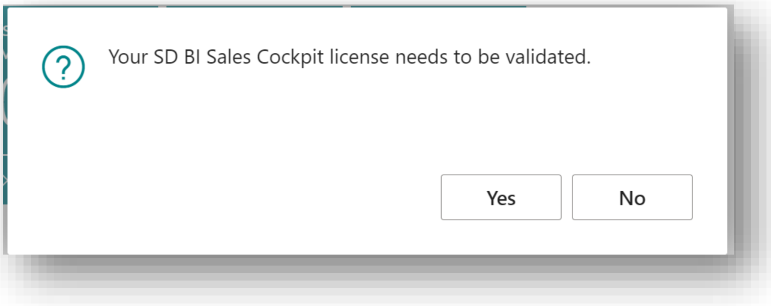


Figure 4-12

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

4.4.1 Activating the SD BI Sales Cockpit Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd., in the **Activate your product** page *(Figure 4-13)*:

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** *(Figure 4-13)*.

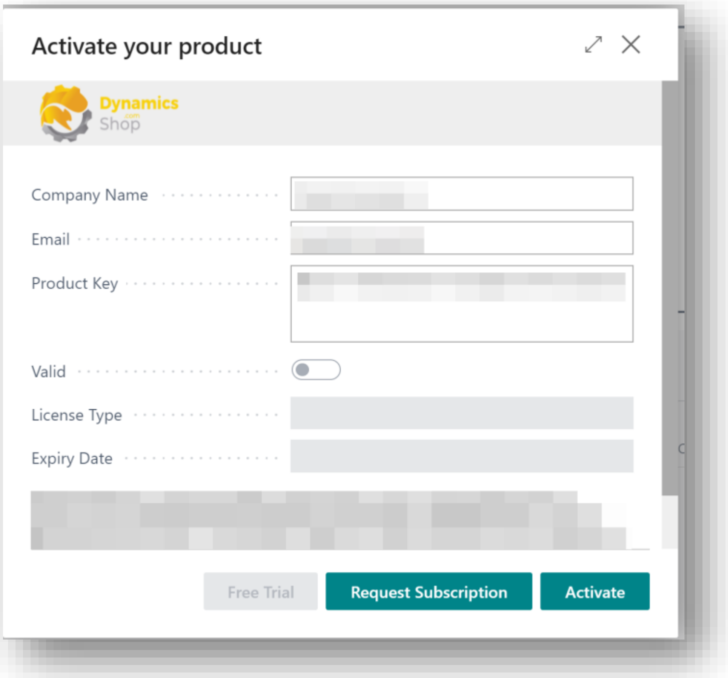


Figure 4-13

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 Sales 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 4-14)*:

1. Enter your company name in **Company Name**
2. Enter your company email in **Email**
3. Choose **Free Trial** *(Figure 4-14)*.

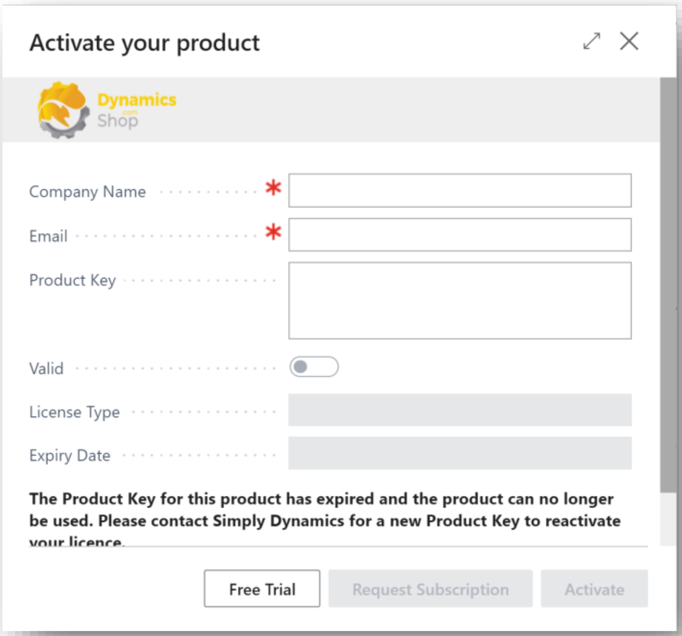


Figure 4-14

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** *(Figure 4-15)*.

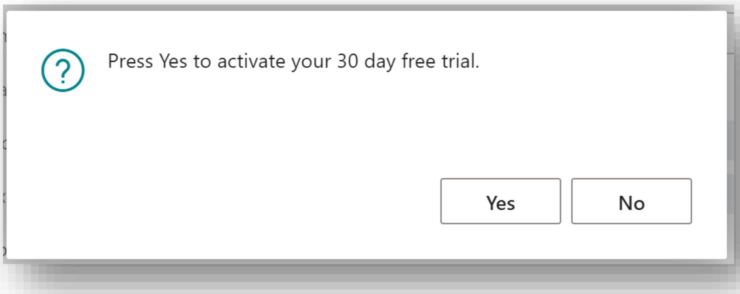


Figure 4-15

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 4-16)*.

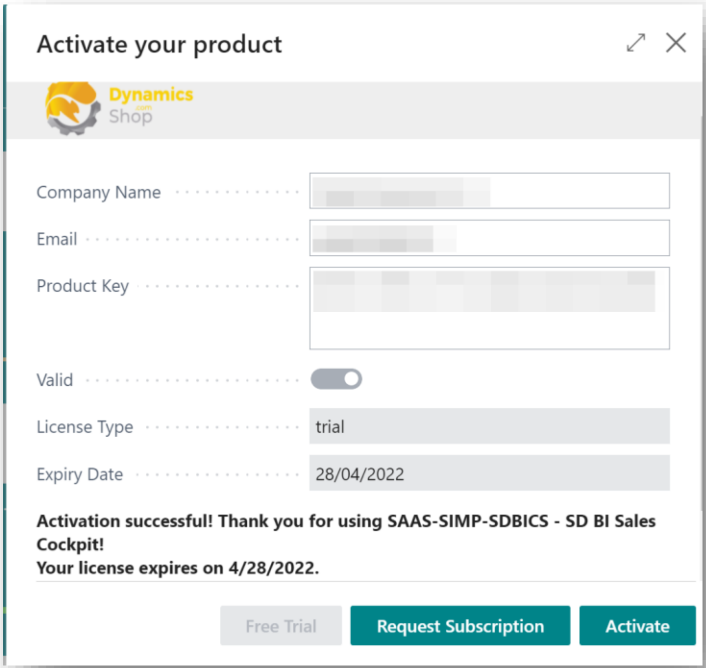


Figure 4-16

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 Sales Cockpit

You can uninstall **SD BI Sales 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)*.

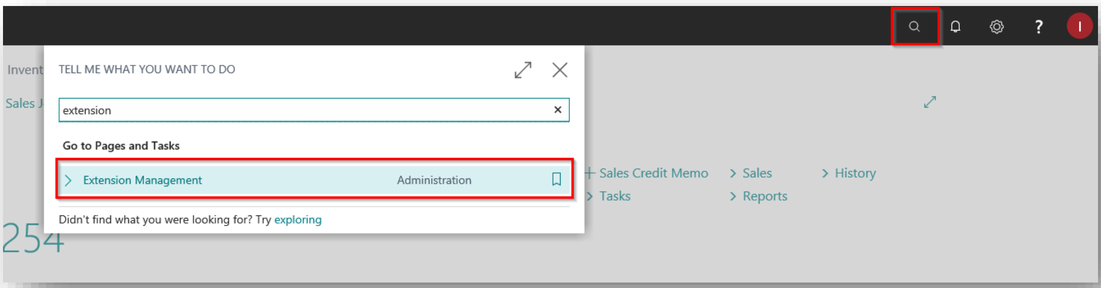


Figure 5-1

2. In **Extension Management**, you should see the **SD BI Sales Cockpit** App installed.

3. Select the **SD BI Sales Cockpit** App and choose the **Uninstall** Action (*Figure 5-2*).

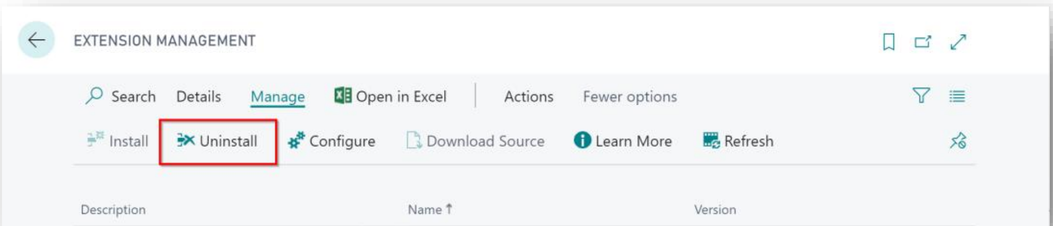


Figure 5-2

6 Using SD BI Sales Cockpit

Once installation is complete, you can begin to track and display, either at Manager or Salesperson level, your sales cycle activity for Quotes and Orders and generate Customer Alerts for drops in sales value activity in SD BI Sales Cockpit.

6.1 Setup

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

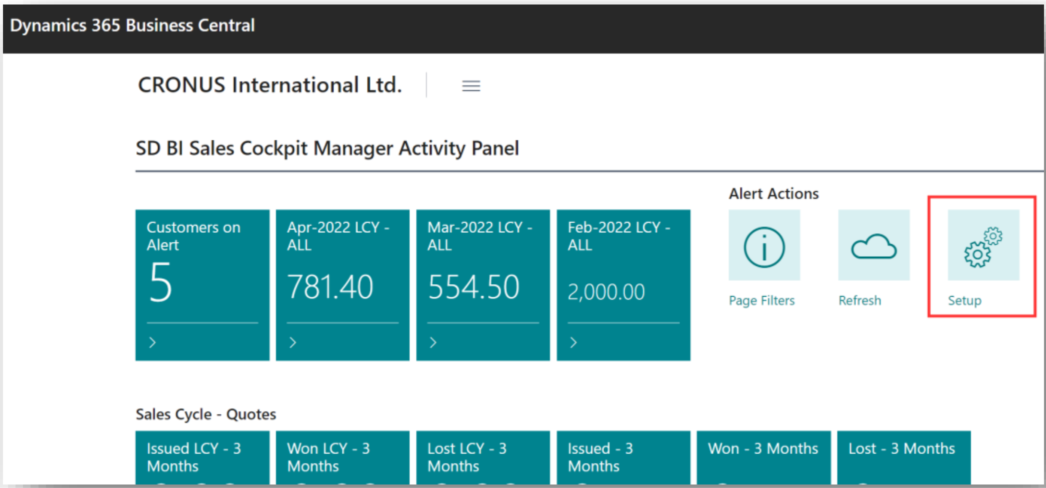


Figure 6-1

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

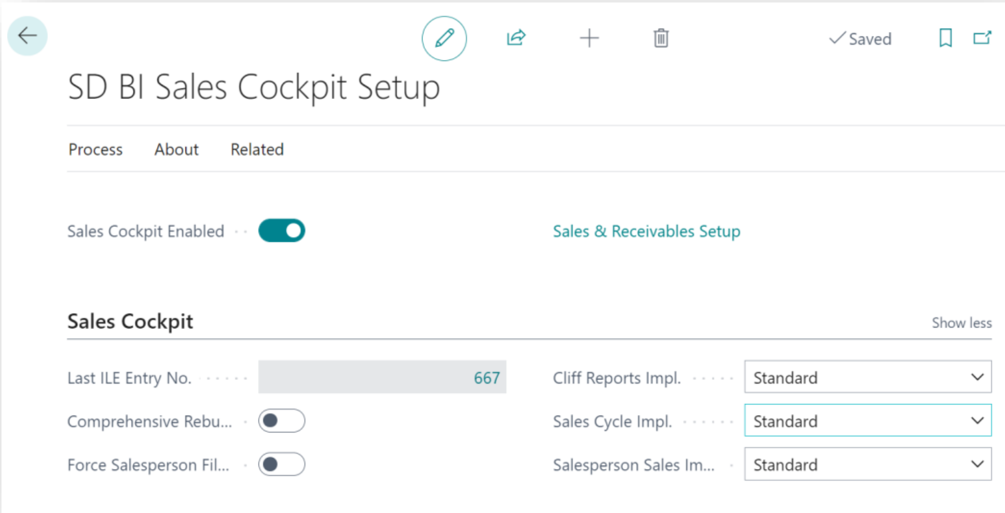


Figure 6-2

- **Sales Cockpit Enabled** – Select this option if you want to enable the Sales Cockpit and Sales Cycle functionality in SD BI Sales Cockpit.

- **Sales & Receivables Setup –** Choose this action link to open the standard Microsoft Dynamics 365 Business Central Sales & Receivables Setup card. Users can choose to turn on Archiving for Quotes and Orders here if they wish. We recommend turning on archiving if you want to capture full details of your sales cycle.

- **Last ILE Entry No.** – This field is used in the Customer Alerts calculations and displays the Last ILE Entry No that was used in the Cliff Report calculations.

- **Comprehensive Rebuild** – Select this field if you want to rebuild the Customers on Alert/Cliff Report from scratch again and disregard the value in the **Last ILE Entry No.** field.

  Note: A Comprehensive Rebuild may take a significant amount of time to run depending on the size of your Item Ledger Entry table.

- **Force Salesperson Filter** – Select this field if you want to limit the **SD BI Sales Cockpit User Role Centre** so that the currently logged in user can see only the values and alerts for their own customers.

- **Sales Cycle Handler Codeunit** – This field specifies the Sales Cycle Handler Codeunit to use in SD BI Sales Cockpit. 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. Using The Sales Cycle Handler Codeunit is used to track Quotes to Orders.

- **Cliff Reports Handler Codeunit** – This field specifies the Cliff Reports Handler Codeunit to use in SD BI Sales Cockpit. 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 customer alerts in SD BI Sales Cockpit.

- **Salesperson Handler Codeunit** – This field specifies the Salesperson Handler Codeunit to use in SD BI Sales Cockpit. 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 Salesperson Handler Codeunit contains the logic used to calculate the Sales LCY for the salesperson.

In the **Default Alert Period Settings** FastTab, you define the default alert settings that will be set when creating **new Views** in the **Customer Alerts** 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 6-3*):

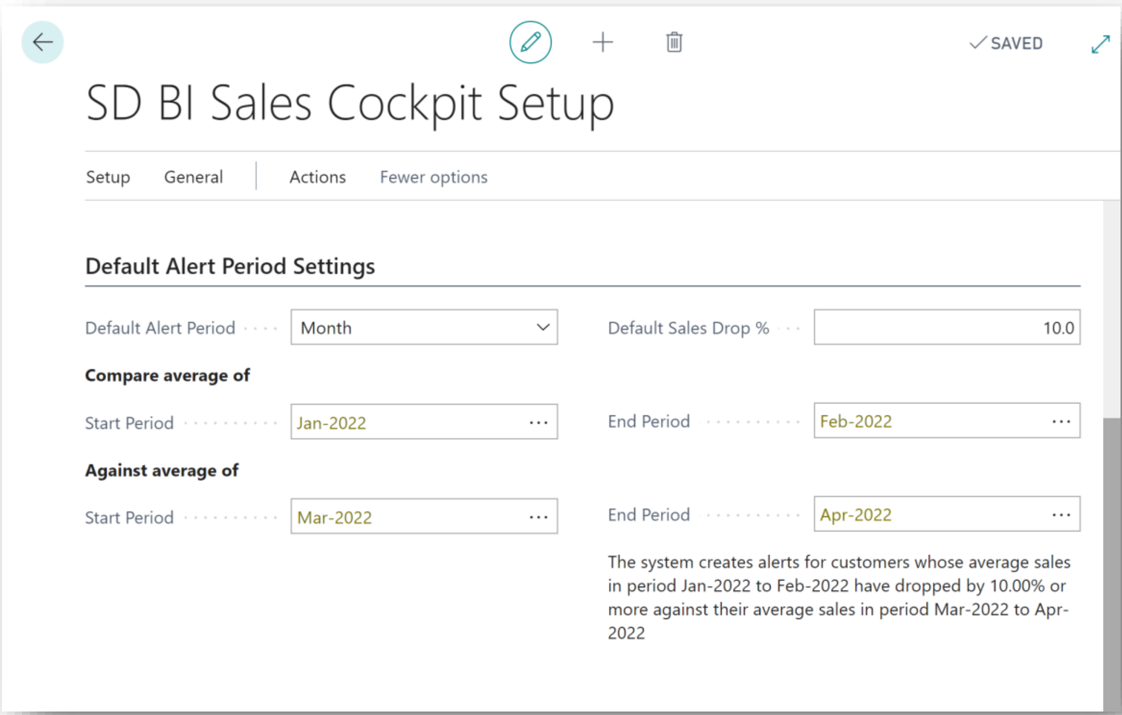


Figure 6-3

- **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 Sales Filters** FastTab, you define the default minimum sales filters that will be set when creating **new Views** in the **Customer Alerts** page. You define the Customers to exclude from the query where the Customer's Minimum Sales Amount is below a certain threshold in a particular period (*Figure 6-4*):

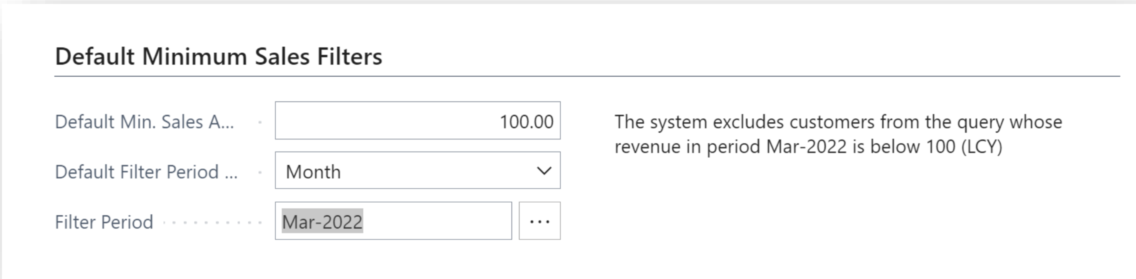


Figure 6-4

- **Default Min. Sales Amount** – Specify the Minimum Sales Amount below which a customer 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 6-5*):

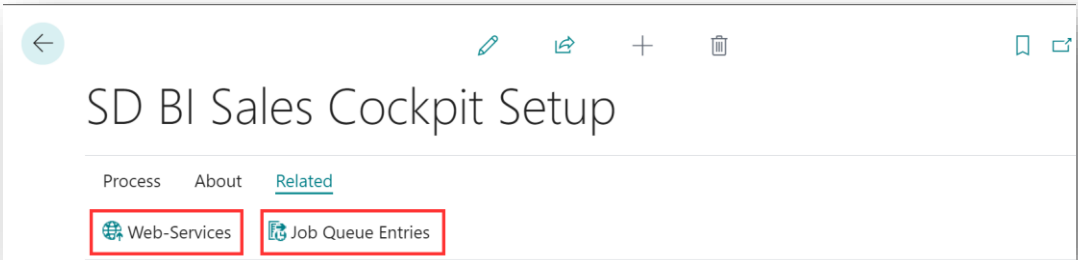


Figure 6-5

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

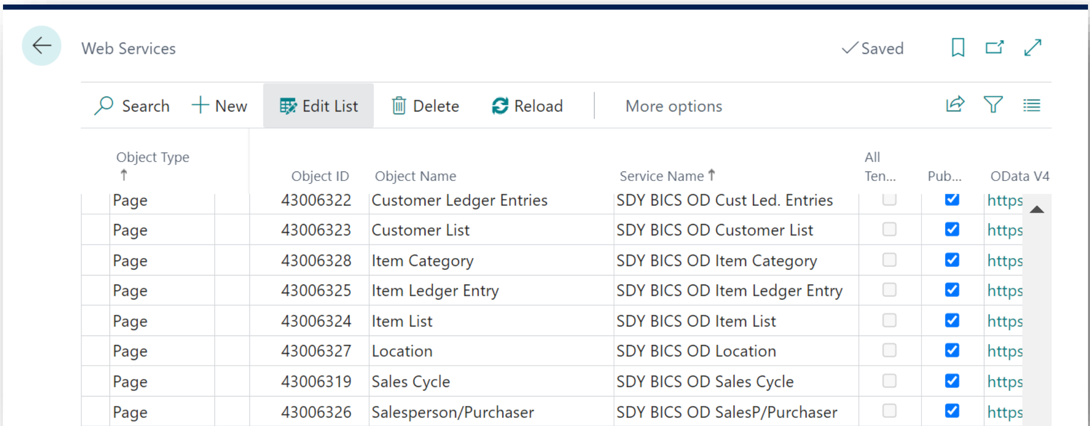


Figure 6-6

- **Job Queue Entries** – Choose this action to create a Job to refresh the SD BI Sales Cockpit data. To avoid processing overheads, this Job is set to run during weekdays at 5 a.m. (*Figure 6-7*). Alternatively, you can choose the Refresh action button on the SD BI Sales Cockpit Role Centre during the day to refresh the data.

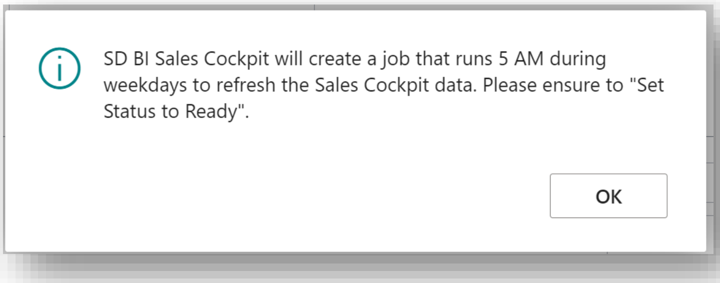

SD BI Sales Cockpit will create a job that runs 5 AM during weekdays to refresh the Sales Cockpit data. Please ensure to "Set Status to Ready".
OK

Figure 6-7

6.2 Customer Alerts/Cliff Report

The Customer Alerts/Cliff Report page is accessed from the **SD BI Sales Cockpit Role Centre** by drilling through on the **Customers on Alert** cue**.** You can also access the **Customer Alerts** page by searching the Tell Me.

To help you get started, an **Initial View** is created on installation. With SD BI Sales Cockpit, you can generate Customer Alerts for drops in sales value activity (Cliff Report) comparing variable periods (*Figure 6-8*).

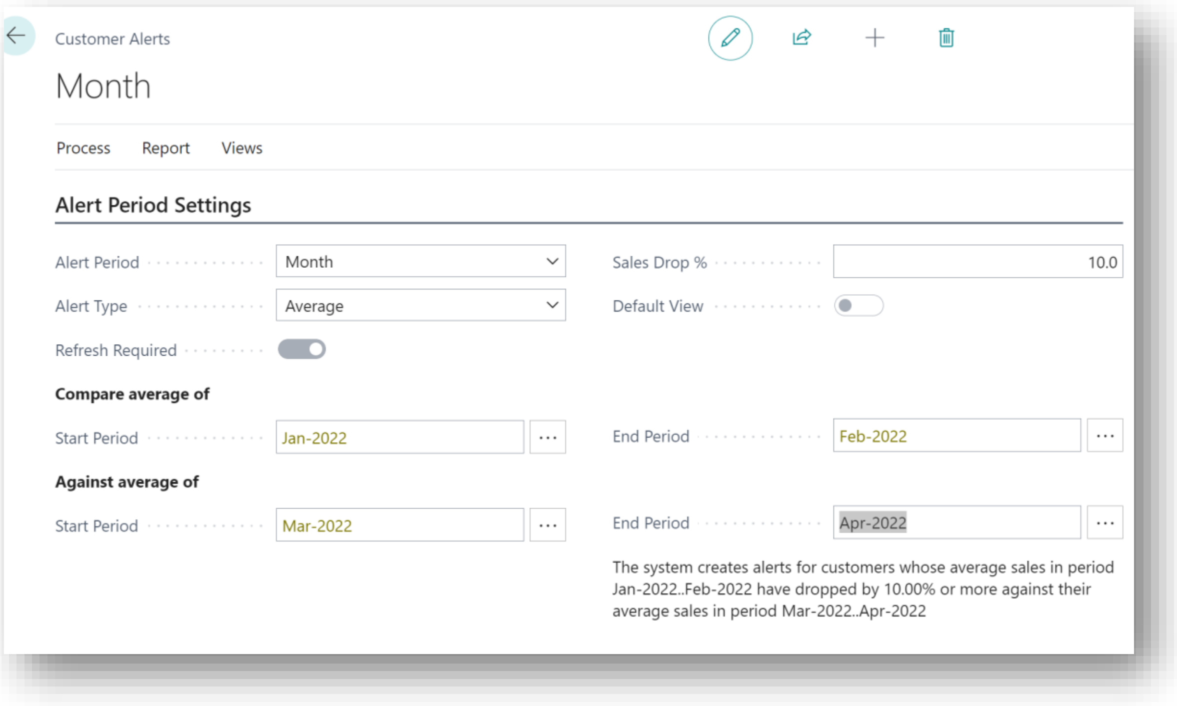


Figure 6-8

The **Customer Alerts** page contains the following fields in the **Alert Period Settings** FastTab (*Figure 6-9*):

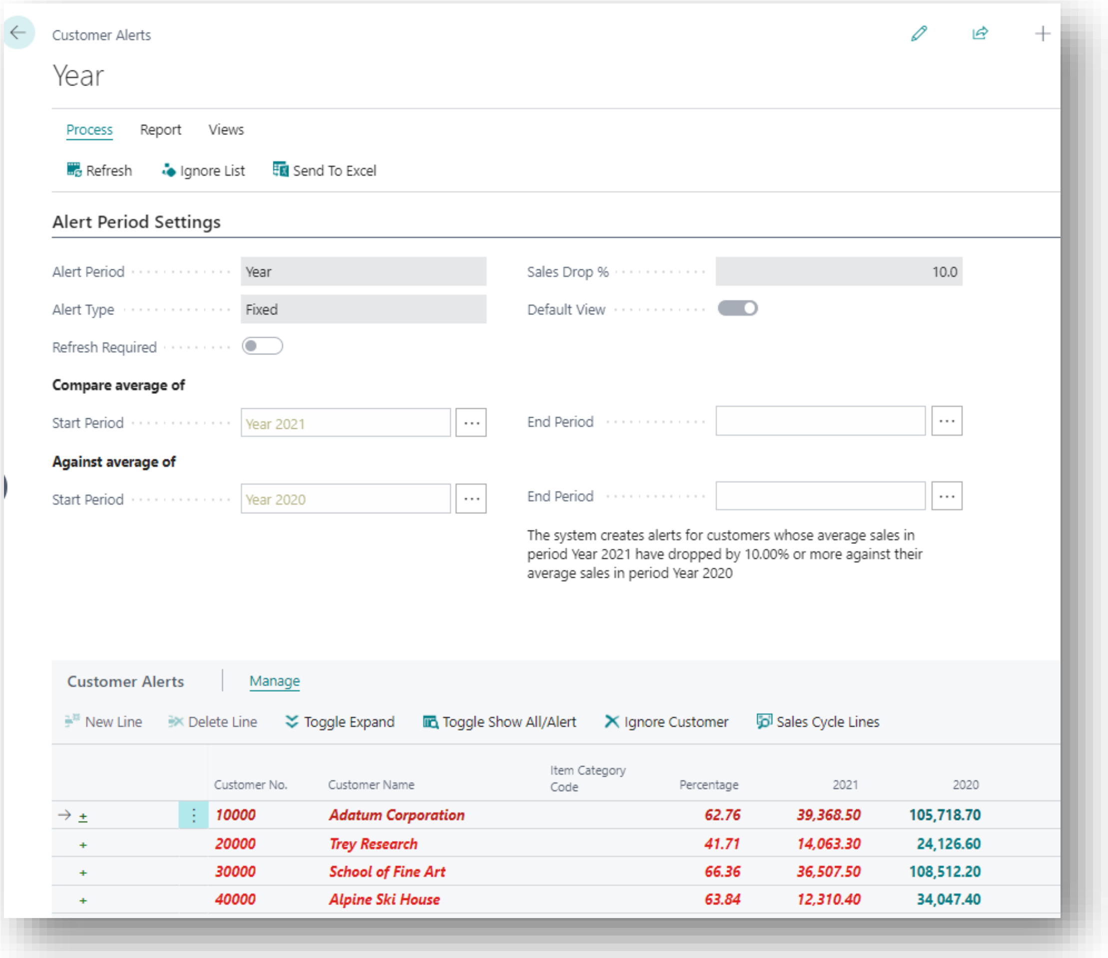


Figure 6-9

- **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 customers whose sales have dropped by the **Sales Drop %** from one period to the next.

  When choosing **Average** you are creating alerts for customers 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 Customer Alerts page.

- **Refresh Required** – This option is set to true if any of the filter fields in the Customer Alerts page are updated after the alerts are calculated. This notifies the user that the Customer 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 Customer Alerts page. You define the Customers to exclude from the query where the Customer's Minimum Sales Amount is below a certain threshold in a particular period (*Figure 6-10*):

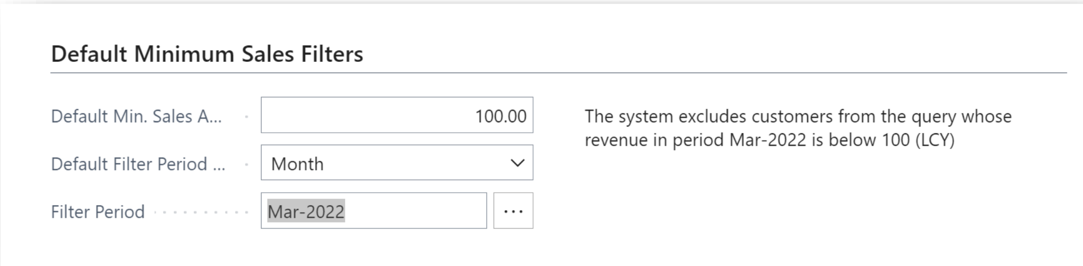


Figure 6-10

- **Minimum Sales Amount (LCY)** – Specify the Minimum Sales Amount below which a customer 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 6-11)*. When you choose to create a New View, the View is created with the default values from the SD BI Sales Cockpit.

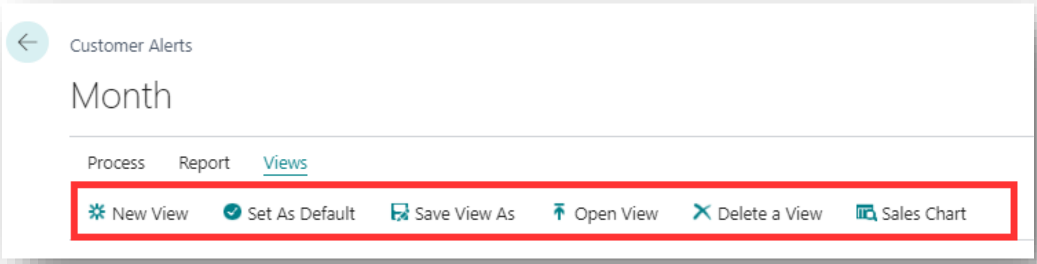


Figure 6-11

From the **Reports** menu group, you can print the **Customer/Item Sales** report and the **Customer – Top 10** report (*Figure 6-12*).

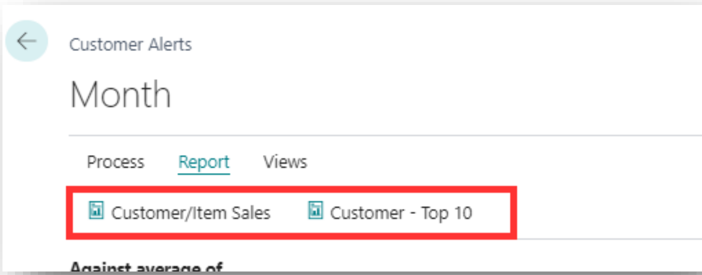


Figure 6-12

When you are ready to calculate the Customer Alerts, from the **Process** menu group, choose **Refresh** (*Figure 6-13*)**.**

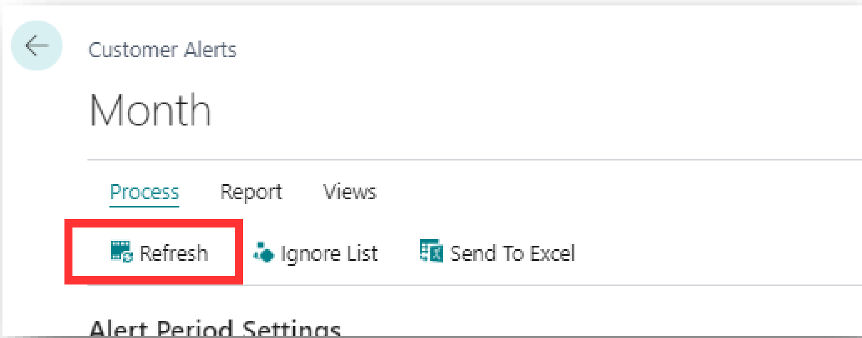


Figure 6-13

The Customer Alerts are displayed. Those Customers flagged as on Alert have their name highlighted in red. Periods where sales have dropped off from the previous period are highlighted in red and periods where sales have improved from the previous period are highlighted in green (*Figure 6-14*).

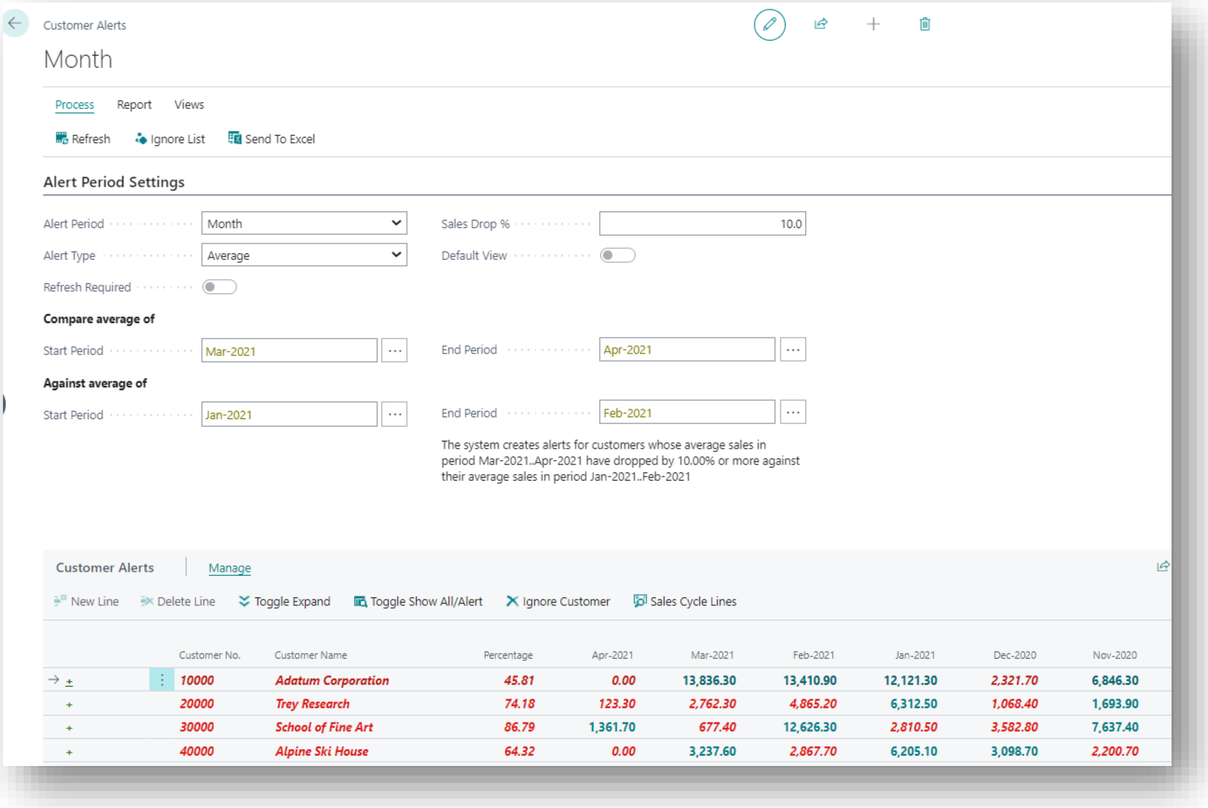


Figure 6-14

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

You can expand on the Customer record in the Customer 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 (*Figure 6-15)*:

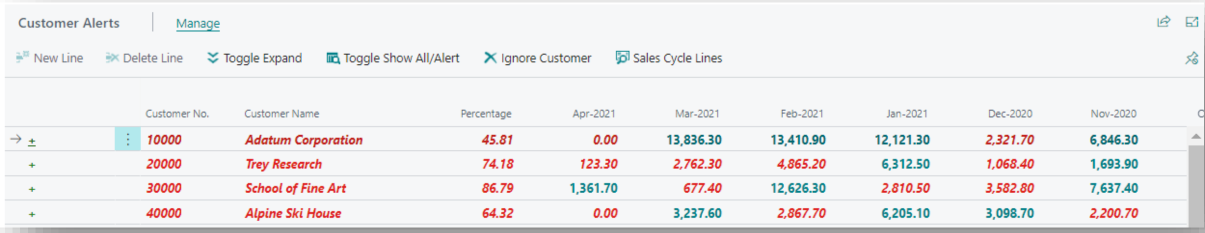


Figure 6-15

Note: The Customer Alerts/Cliff Report is Item based only. G/L values are not reported on.

Note: An OnAfterFilterItemLedger event has been surfaced to allow users the ability to filter the results of the Cliff Report to specific criteria.

You can also choose to view the Sales Cycle information for the selected Customer by choosing the **Sales Cycle Lines** action (*Figure 6-16*):

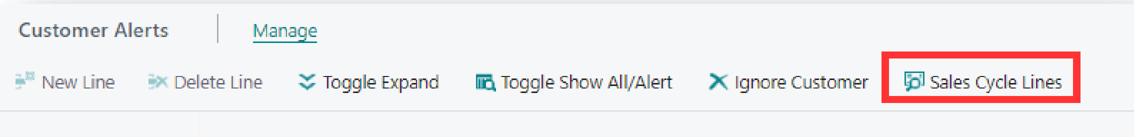


Figure 6-16

This will show you details of the Quotes that have been Won or Lost and the Orders for the selected customer (*Figure 6-17*):

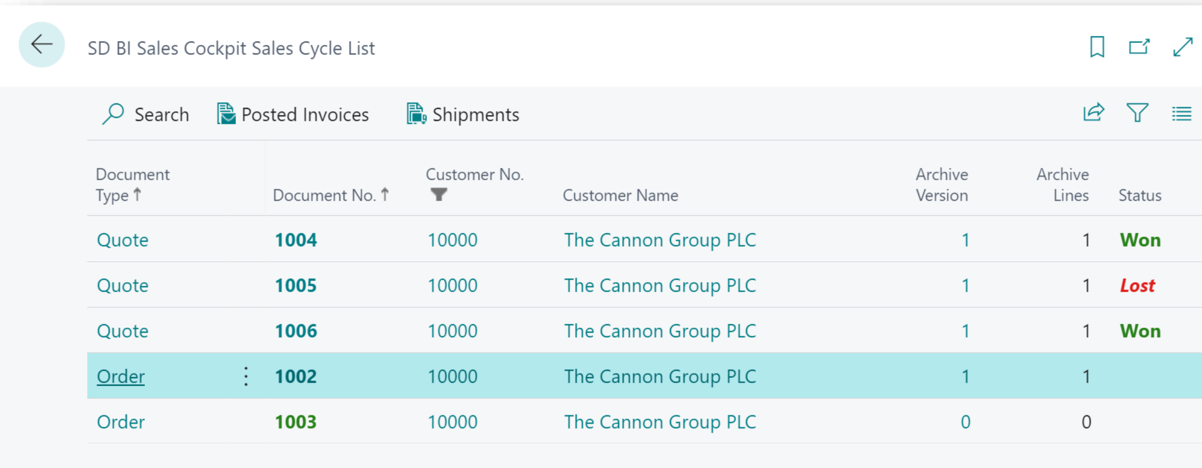


Figure 6-17

6.3 Sales Cycle

SD BI Sales Cockpit allows you to track and display your sales cycle activities for Quotes and Orders, keeping track of quotes lost and won.

If a Quote is lost and not converted to an Order, then on delete of the Quote you are prompted to select the reason, from a list of Reason Codes, why the Order was lost (*Figure 6-18*):

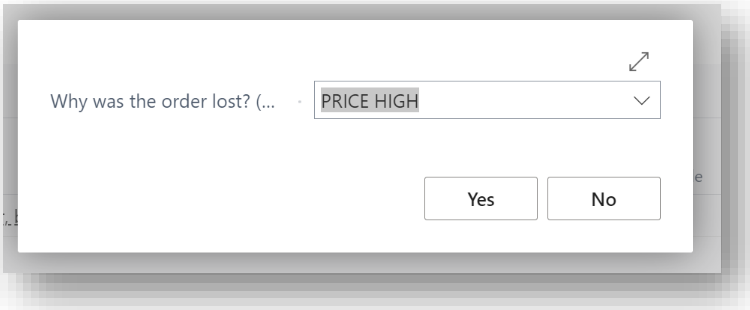


Figure 6-18

If you turn on standard Microsoft Dynamics 365 Business Central Sales and Quote archiving, you can also easily view the archived information from the drilldowns from the Sales Cycle cues on the SD BI Sales Cockpit Role Centre activity pages (*Figure 6-19*):

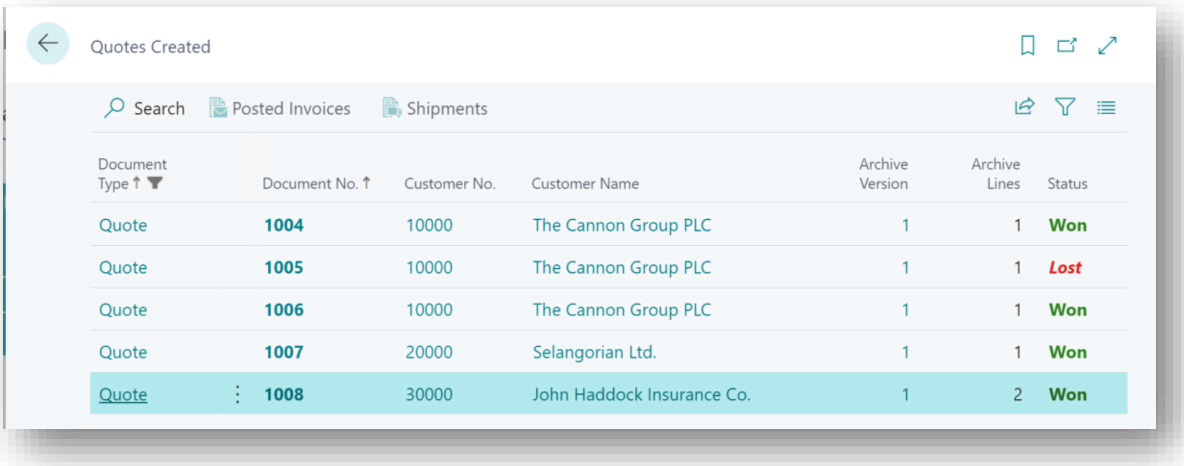


Figure 6-19

6.4 SD BI Sales Cockpit Manager Role Centre

The SD BI Sales Cockpit Manager Role Centre (*Figure 6-20*) allows you to view your Customer's on Alert and revenue for all salespeople or filtered down to specific salespeople for a particular time period.

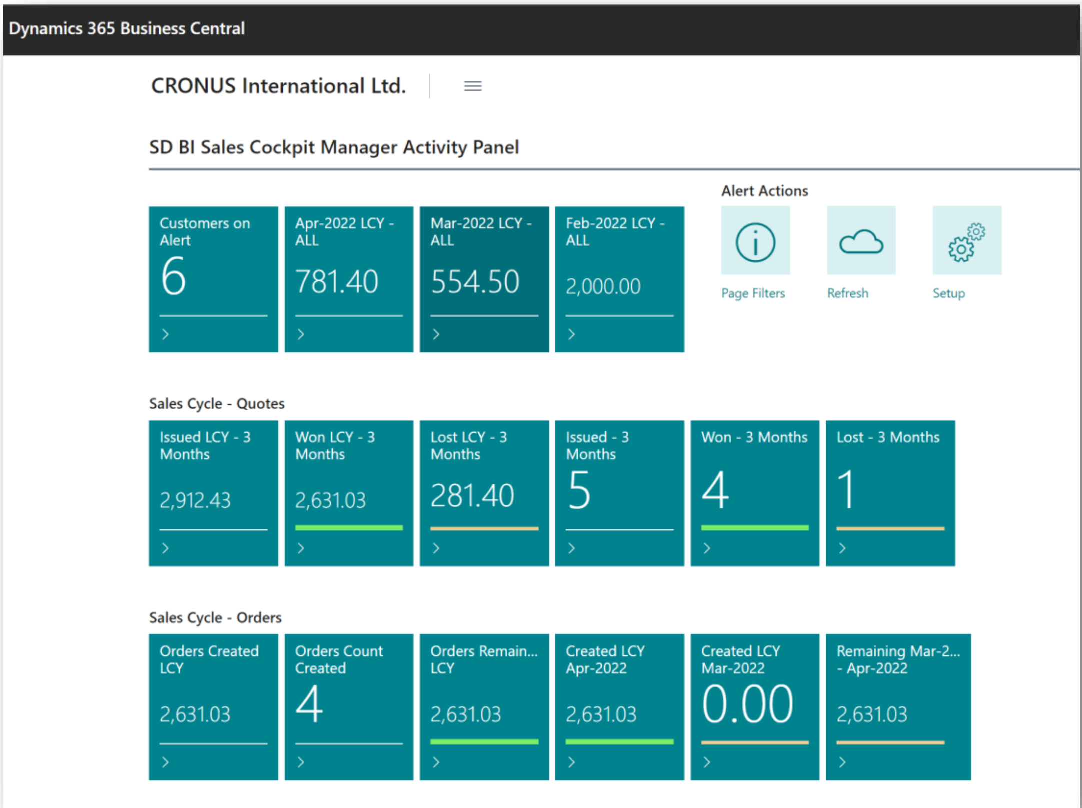


Figure 6-20

You can also track the Sales Cycle for your Quotes (*Figure 6-21*):

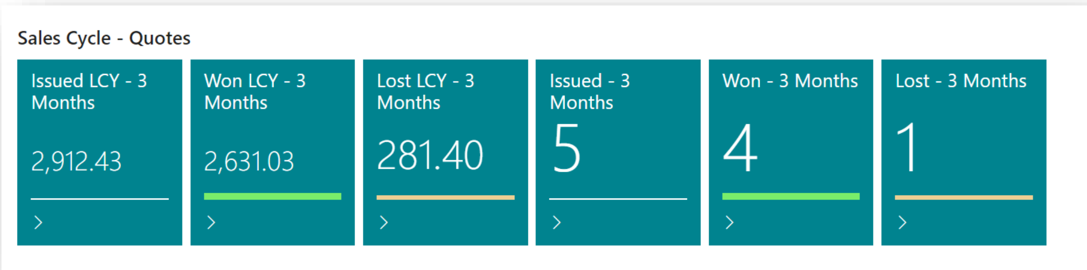


Figure 6-21

And for you Orders (*Figure 6-22*):

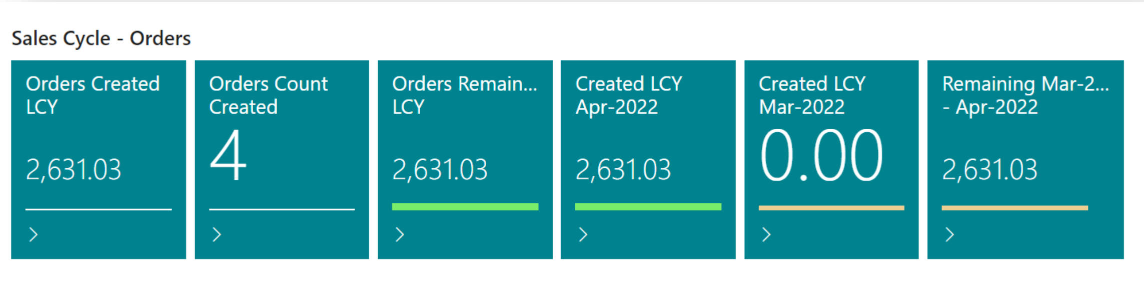


Figure 6-22

The values in the cues on the SD BI Sales Cockpit can be filtered down by choosing the Page Filters (*Figure 6-23*):

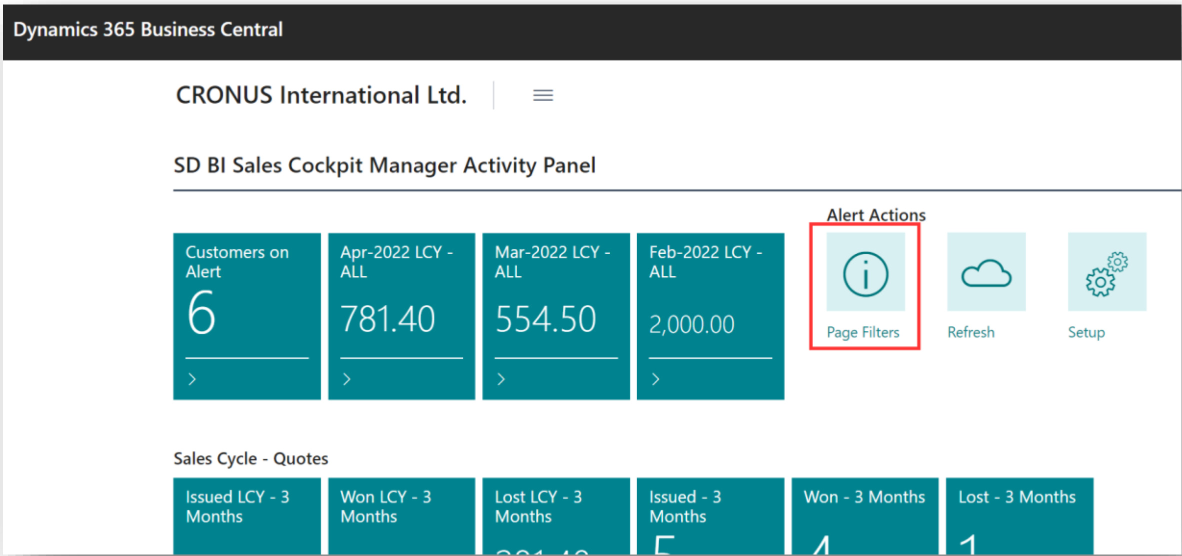


Figure 6-23

The Salesperson Filters apply to the Salesperson cues, and the Sales Cycle cues. The Quote and Order Filters apply to the Sales Cycle cues (*Figure 6-24*):

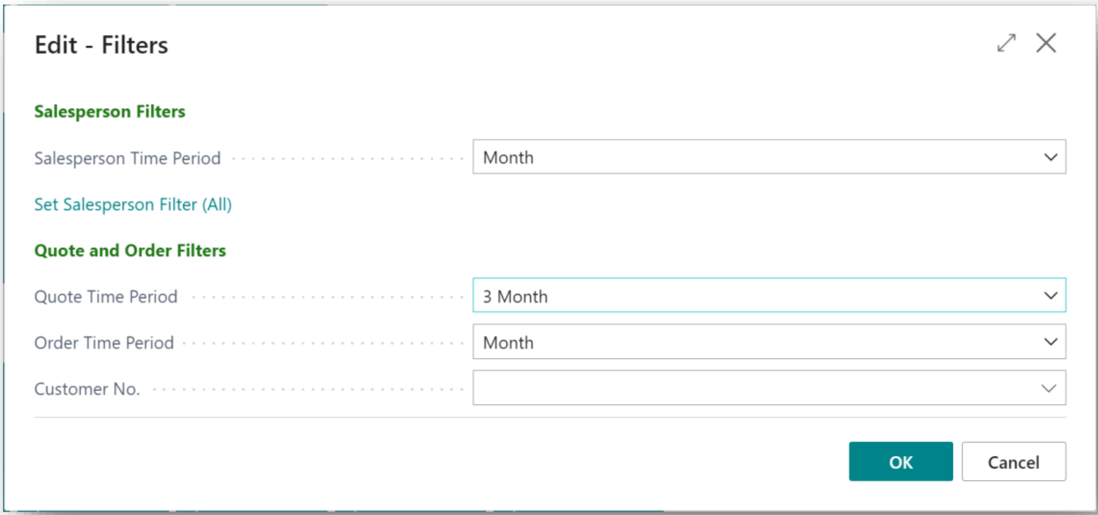


Figure 6-24

The Salesperson cues in the SD BI Sales Cockpit Role Centre can be displayed as different time periods and filtered to different Salespeople (All or specific) (*Figure 6-25*):

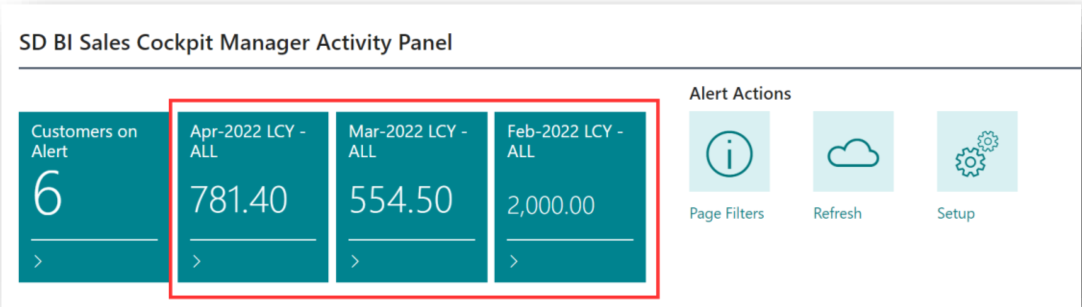


Figure 6-25

The Sales Cycle Cues can be filtered by differing time periods and can be narrowed down to a specific Customer (*Figure 6-26*):

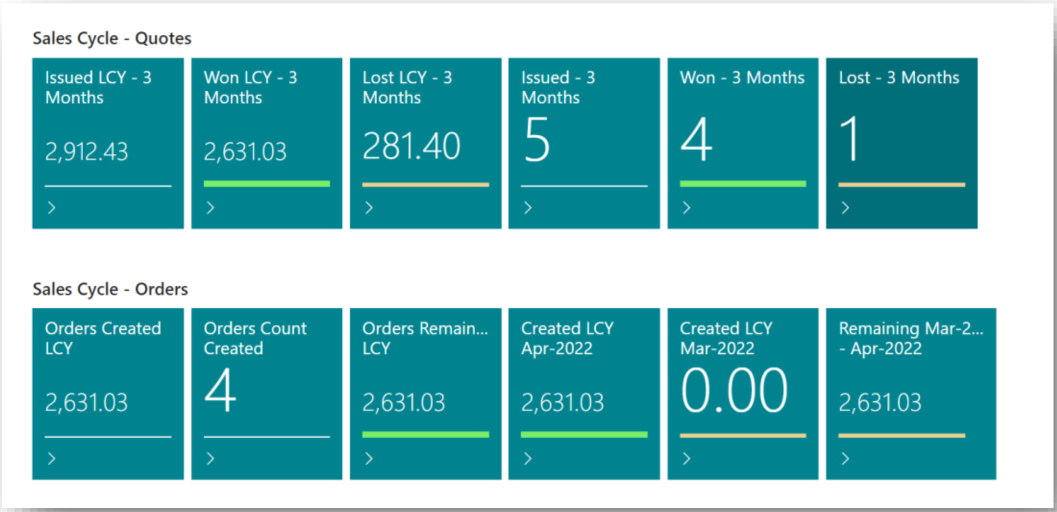


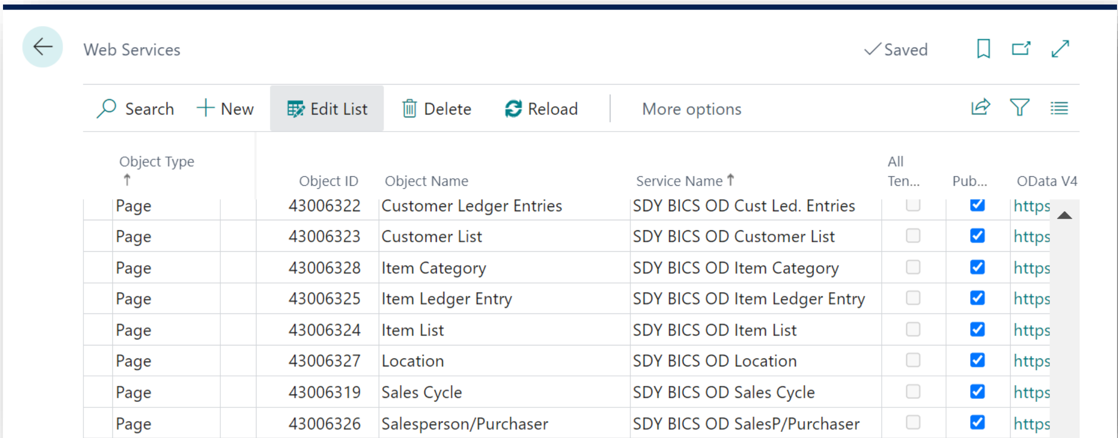
Figure 6-26

Note: You will need to use the Refresh action cue on the SD BI Sales Cockpit to refresh the cues. SD BI Sales Cockpit does not use events on sales line level as it may produce a processing overhead cost.

6.5 SD BI Sales 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 Sales Cockpit can be presented out to a ready-made set of Power BI Dashboards via ODATA Feeds. SD BI Sales Cockpit contains 8 pages published as OData Webservices (*Figure 6-27*).



Object Type	Object ID	Object Name	Service Name	All Ten...	Pub...	OData V4
Page	43006322	Customer Ledger Entries	SDY BICS OD Cust Led. Entries	☐	☑	https
Page	43006323	Customer List	SDY BICS OD Customer List	☐	☑	https
Page	43006328	Item Category	SDY BICS OD Item Category	☐	☑	https
Page	43006325	Item Ledger Entry	SDY BICS OD Item Ledger Entry	☐	☑	https
Page	43006324	Item List	SDY BICS OD Item List	☐	☑	https
Page	43006327	Location	SDY BICS OD Location	☐	☑	https
Page	43006319	Sales Cycle	SDY BICS OD Sales Cycle	☐	☑	https
Page	43006326	Salesperson/Purchaser	SDY BICS OD SalesP/Purchaser	☐	☑	https

Figure 6-27

The standard Microsoft Dynamics 365 Business Central Power BI Report FactBox is also embedded in the SD BI Sales Cockpit Role Centres. 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 6-28*):

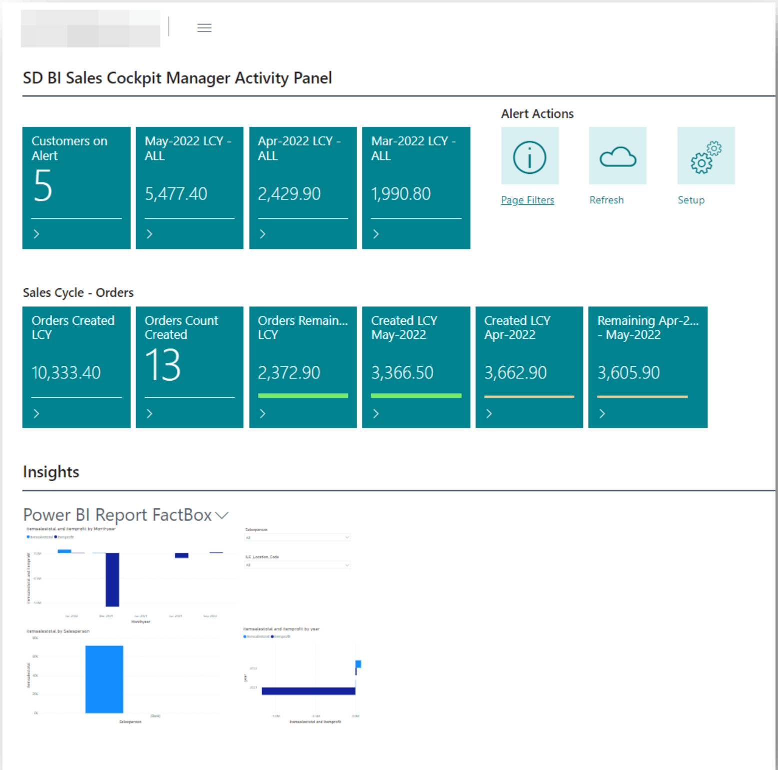


Figure 6-28

We can provide you with a ready-made set of Power BI Dashboards fed via the ODATA Feeds above (*Figure 6-29*).

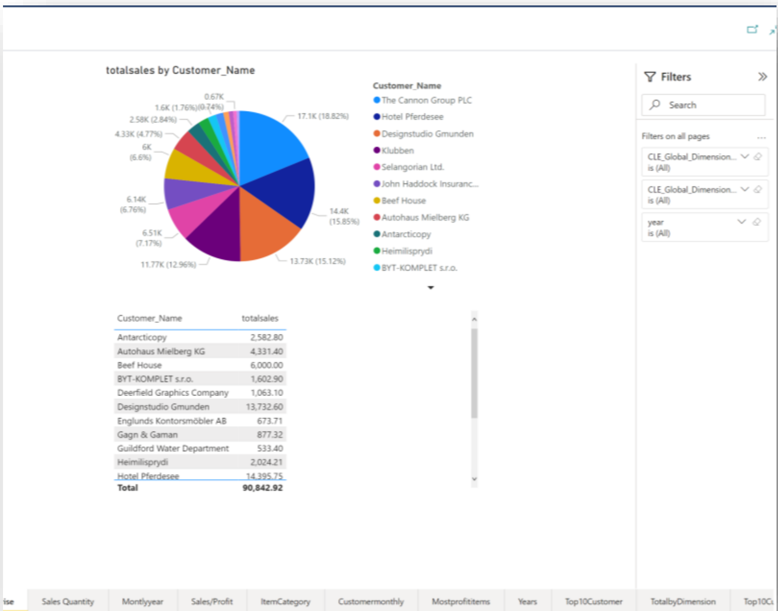


Figure 6-29

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