

User Guide for Microsoft Dynamics 365 Business Central

Product: SD BI Sales Cockpit

Release: D365 BC V19+

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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*).

Role I					
	ID 1	~	Name	Extension Name	Scope †
→ <u>SDY</u>	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*).

								٩	Ģ	Ø	?	0
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	SalesReports	> History					
רכ	Didn't find what you were looking for? Try exploring					, nopona						_
204	÷											- 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*).

? 🕕	ı ©	Q	۹						
							∠ ×		TELL ME WHAT YOU WANT TO DO
		7	2				×		extension
									Go to Pages and Tasks
				> History	> Sales > Reports	+ Sales Credit Memo ≻ Tasks	Ω	Administration	> Extension Management
					7 Reports	7 10383			Didn't find what you were looking for? Try exploring
									ł

Figure 4-2

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

🔎 Sear	rch Manage More options			Ê
ls Inst	Name †	Publisher	Version	Published /
Yes	Late Payment Prediction	Microsoft	v. 19.4.35398.36261	Global
Yes	OnPrem Permissions	Microsoft	v. 19.4.35398.36261	Global
Yes	PayPal Payments Standard	Microsoft	v. 19.4.35398.36261	Global
No	Performance Toolkit	Microsoft	v. 19.4.35398.36261	Global
No	Permissions Mock	Microsoft	v. 19.4.35398.36261	Global
Yes	Recommended Apps	Microsoft	v. 19.4.35398.36261	Global
Yes	Sales and Inventory Forecast	Microsoft	v. 19.4.35398.36261	Global
Yes	SD BI Sales Cockpit	Simply Dynamics Ltd	v. 3.3.0.0	Global
Yes	SD Document Pack	Simply Dynamics Ltd	v. 3.5.0.0	Global
Yes	SD Long Term Agreements	Simply Dynamics Ltd	v. 2.1.1.0	Global
Yes	SD Trade Counter	Simply Dynamics Ltd	v. 2.0.0.0	Global
Yes	Send remittance advice by email	Microsoft	v. 19.4.35398.36261	Global
Ves	Send To Email Printer	Microsoft	v 19.4 35398 36261	Global





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

,∕⊃ Sear	ch <u>Manage</u>	More options						Ŕ
都 Exter	nsion Marketplace	🗟 Deployment	Status	🔆 Uninstall	📌 Confi	gure	🕕 Learn Mor	е
🔓 Uplo	ad Extension	🚔 Install		🔆 Unpublish	🗋 Down	load Source	😂 Refresh	
ls Inst	Name †		Publisher		Ver	sion		Published
Yes	Late Payment P	rediction	Microsof	t	v. 1	19.4.35398.362	261	Global
Yes	OnPrem Permis	sions	Microsof	ť	v. 1	19.4.35398.362	261	Global
Yes	PayPal Payment	s Standard	Microsof	ť	v . 1	19.4.35398.362	261	Global
No	Performance To	olkit	Microsof	ť	v. 1	19.4.35398.362	261	Global
No	Permissions Mo	ck	Microsof	ť	v. 1	19.4.35398.362	261	Global
Yes	Recommended	Apps	Microsof	ťt	v. 1	19.4.35398.362	261	Global
Yes	Sales and Inven	tory Forecast	Microsof	ť	v. 1	19.4.35398.362	261	Global
Yes	SD BI Sales Coc	kpit	Simply D	ynamics Ltd	v. 3	3.3.0.0		Global
Yes	SD Document P	ack	Simply D	ynamics Ltd	v. 3	3.5.0.0		Global
Yes	SD Long Term A	greements	Simply D	ynamics Ltd	v. 2	2.1.1.0		Global
Yes	SD Trade Count	er	Simply D	ynamics Ltd	v. 2	2.0.0.0		Global
Yes	Send remittance	e advice by email	Microsof	+	V 1	19.4.35398.362	261	Global

Figure 4-4

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

Extension Settings	+ III ✓ Saved	
SD BI Sales Cockpit		
Group		
App ID 9ba31dd4-	Publisher · · · · · · · Simply Dynamics Ltd	
Name SD BI Sales Cockpit	Allow HttpClient Requ	
		-

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*).

Actions + Sales Journals Transfer Orders ACTIONS + Sales Quote + Sales Order + Sales Credit Memo > Sales + Sales Invoice + Sales Return Order > Tasks > Reports 254	Sales Journals Cash Receipt Journals Transfer Orders ACTIONS ACTIONS ACTIONS ACTIONS ACTIONS ACTIONS ACTIONS ACTIONS	
ACTIONS + Sales Quote + Sales Order + Sales Credit Memo > Sales > His + Sales Invoice + Sales Return Order > Tasks > Reports Assisted setup	ACTIONS + Sales Quote + Sales Order + Sales Credit Memo > Sales > His 	
+ Sales Quote + Sales Order + Sales Credit Memo > Sales > His + Sales Invoice + Sales Return Order > Tasks > Reports Assisted setup	+ Sales Quote + Sales Order + Sales Credit Memo > Sales > His	^
+ Sales Invoice + Sales Return Order > Tasks > Reports	+ Sales Quote + Sales Order + Sales Credit Memo > Sales > His	- 11
	+ Sales Invoice + Sales Return Order > Tasks > Reports	- 11
54		- 11
	254	- 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 09:4	13.	
	OK Can	cel

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







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

Display Name	
SD Trade Counter - User	
SD Trade Counter - Manager	
SD Long Term Agreements	
SD BI Sales Cockpit Manager	:
SD BI Sales Cockpit User	
Company Hub	
SD Document Pack	
Accountant	
Business Manager	
Business Manager Evaluation	
Service Manager	
Sales Order Processor	
Manufacturing Manager	
Project Manager	
Calas and Deletionship Menonen	
	OK Cancel



- 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).

Role	SD BI Sales Cockpit Manager	
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 09:4	13.	
	OK Cano	







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*).

Tell me what you want to do		2 ×
sd bi		
Go to Pages and Tasks		Show less (3)
> SD BI Sales Cockpit Setup	Tasks	
> SD BI Sales Cockpit Alert List	Lists	
> SD BI Sales Cockpit Activity Panel	Tasks	
> SD BI Sales Cockpit Sales Cycle List	Lists	
> SD BI Sales Cockpit Salesperson Sales	Lists	
> SD BI Sales Cockpit Manager Activity Panel	Tasks	

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*).

i	Your license is invalid.	
	ОК	
		P



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

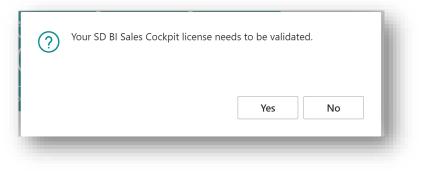


Figure 4-12

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*).

Activate your product	$\scriptstyle \nearrow$ \times
Shop	
Company Name	
Email	
Product Key · · · · · · · · · · · · · · · · · · ·	
Valid ·····	
License Type	
Expiry Date	
	16.1
Free Trial Request Subscription	Activate

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).

Activate your	product	2 ×
Shop	s	
Company Name	*	
Email · · · · · · · · ·	*	
Product Key		
Valid · · · · · · · · ·		
License Type		
Expiry Date		
	or this product has expired and the ntact Simply Dynamics for a new Pr	
	Free Trial Request Sub	oscription Activate

Figure 4-14

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

Activate your pr				
Shốp				
Company Name				
Email · · · · · · · · · · · · ·				
Product Key				
Valid · · · · · · · · · · · · · · · · · · ·		D		
License Type	· · · · · · · · tria	al		
Expiry Date		/04/2022		
Activation successful!	Thank you for	using SAAS-SIMP-SD	BICS - SD BI Sale	5
Cockpit! Your license expires o	n 4/28/2022.			
•				
	Free Trial	Request Subscrip	tion Activa	ite

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*).

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

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*).

🔎 Search Details 👲	Anage I Open in Excel Actions	Fewer options	\\
👫 Install 🔅 Uninstall	Configure 🗋 Download Source	🕦 Learn More 🛛 🔀 Refresh	焓
Description	Name 1	Version	

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*).

CRONUS Inte	ernational Ltd.	\equiv			
SD BI Sales Co	ckpit Manager A	ctivity Panel			
				Alert Actions	
Customers on Alert	Apr-2022 LCY - ALL	Mar-2022 LCY - ALL	Feb-2022 LCY - ALL	(j)	\bigcirc
5	781.40	554.50	2,000.00	Page Filters	Refresh
>	<u> </u>	→ →	>		

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*):





SD BI Sales Cockpit Set	up			
Process About Related				
Sales Cockpit Enabled \cdots 💽		Sales & Receivables Setup	1	
Sales Cockpit				Show
Last ILE Entry No.	667	Cliff Reports Impl.	Standard	
Comprehensive Rebu		Sales Cycle Impl.	Standard	
Force Salesperson Fil		Salesperson Sales Im	Standard	



- 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*):

Setup General	Actions Fewer options		
Default Alert Period	Settings		
Default Alert Period	Month ~	Default Sales Drop % · · ·	10.
Compare average of			
Start Period	Jan-2022	End Period	Feb-2022
Against average of			
Start Period	Mar-2022	End Period	Apr-2022
		in period Jan-2022 to Feb-	or customers whose average sales 2022 have dropped by 10.00% or e sales in period Mar-2022 to Apr-





- **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*):

Default Min. Sales A		100.00	The system excludes customers from the query whose revenue in period Mar-2022 is below 100 (LCY)
Default Filter Period	Month	\sim	revenue in period Mar-2022 is below 100 (LCT)
Filter Period	Mar-2022		



- **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*):

~	2 🖻 + 🛍	
SD BI Sales Coo	ckpit Setup	
Process About <u>Related</u>		- 1
the web-Services 🔀 Job Queue Ent	ries	

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.

ho Search + New	🐯 Edit List	🗓 Delete 🛛 😂 Reload	More options		Ŕ	\ \
Object Type ↑	Object ID	Object Name	Service Name †	All Ten	Pub	OData V
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



 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.





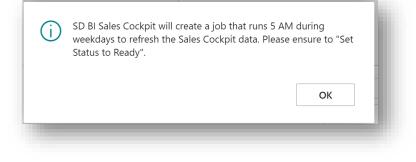


Figure 6-7





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*).

Month				
MONUN				
Process Report Views				
Alert Period Settings				
Alert Period	Month ~	Sales Drop %		10.0
Alert Type	Average \checkmark	Default View		
Refresh Required				
Compare average of				
Start Period	Jan-2022	End Period	Feb-2022	
Against average of				
Start Period	Mar-2022	End Period	Apr-2022	
			ustomers whose average sales in ped by 10.00% or more against tl 022Apr-2022	

Figure 6-8





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

Year							
Process Report	Views						
🚟 Refresh 🛛 👌 Ig	gnore List 🛛 🔢 S	iend To Excel					
Alert Period Sett	ings						
Alert Period	····· Year		Sales Drop % · · · · ·			10.0	
Alert Type	Fixed		Default View				
Refresh Required							
Compare average of							
Start Period	Year 202	1	End Period				
Against average of							
Start Period	Year 202	0	End Period				
			The system creates al				
			period Year 2021 have average sales in perio		10% or more again:	st their	
Customer Alerts	Manage						
	· · · · · · · · · · · · · · · · · · ·			_			
📲 New Line 🛛 🔍	Delete Line 💙	Toggle Expand 🛛 🕅 Toggle S	Show All/Alert 🛛 🗙 Ignor	e Customer 🛛 🝹	Sales Cycle Lines		
			Item Category				
N	Customer No.	Customer Name	Code	Percentage	2021		20
$\rightarrow \pm$	20000	Adatum Corporation		62.76	39,368.50	105,718	
+	30000	Trey Research School of Fine Art		41.71 66.36	14,063.30 36,507.50	24,126	
	40000	Alpine Ski House		63.84	12,310.40	34,047	
+							



- 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*):

Default Min. Sales A		100.00	The system excludes customers from the query whose revenue in period Mar-2022 is below 100 (LCY)
Default Filter Period	Month	\checkmark	
Filter Period	Mar-2022		



- 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.

Month				
Month				
Process Rep	oort <u>Views</u>			
			🗙 Delete a View	

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*).

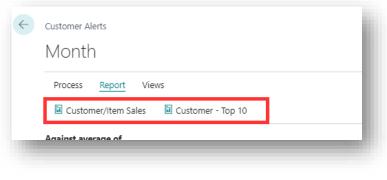


Figure 6-12

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

÷	Customer Alerts Month	l
	Process Report Views	l
5	Alert Period Settings	Į







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*).

Customer Alerts					(+ 🛍		
Month									
Process Repo	rt Views								
🐻 Refresh 🛛 🤞	Ignore List 🛛 🔢	Send To Excel							
Alert Period Se	ettings								
Alert Period · · · · ·	Month	~	Sales Drop % · · · · · ·			10.0			
Alert Type	Average	e 🗸	Default View						
Refresh Required									
Compare average									
Start Period		21	End Period	Apr-2021					
Against average o									
Start Period		n	End Period	Feb-2021					
Start Period	Jan-202	.1							
			The system creates aler period Mar-2021Apr-2	2021 have dropped	by 10.00% or more				
			their average sales in p	eriod Jan-2021Fel	-2021				
Customer Aler	ts Manag	e							
New Line	💌 Delete Line 🛛 🍣	Foggle Expand Toggle Show	v All/Alert 🗙 Ignore	Customer 🛛 👼 S	ales Cycle Lines				
	Customer No.	Customer Name	Percentage	Apr-2021	Mar-2021	Feb-2021	Jan-2021	Dec-2020	Nov-2020
$\rightarrow \pm$: 10000	Adatum Corporation	45.81	0.00	13,836.30	13,410.90	12,121.30	2,321.70	6,846.30
+	20000	Trey Research	74.18	123.30	2,762.30	4,865.20	6,312.50	1,068.40	1,693.90
+	30000	School of Fine Art	86.79	1,361.70	677.40	12,626.30	2,810.50	3,582.80	7,637.40
		Alpine Ski House	64.32	0.00	3,237.60	2.867.70	6,205,10	3,098,70	2,200.70

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*):





New Line 🗼	Delete Line 💙	Toggle Expand 🛛 🖻 Toggle Show	All/Alert 🗙 Ignore		ales Cycle Lines					×
New Line 🦗	Delete Line 🗸	Toggle Expand 🛛 🕅 Toggle Show	/ All/Alert 🔨 Ignore	Customer 😰 S	ales Cycle Lines					×
	Customer No.	Customer Name	Percentage	Apr-2021	Mar-2021	Feb-2021	Jan-2021	Dec-2020	Nov-2020	
±	: 10000	Adatum Corporation	45.81	0.00	13,836.30	13,410.90	12,121.30	2,321.70	6,846.30	-
+	20000	Trey Research	74.18	123.30	2,762.30	4,865.20	6,312.50	1,068.40	1,693.90	
+	30000	School of Fine Art	86.79	1,361.70	677.40	12,626.30	2,810.50	3,582.80	7,637.40	
+	40000	Alpine Ski House	64.32	0.00	3,237.60	2,867.70	6,205.10	3,098.70	2,200.70	



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*):

lew Line	🚿 Delete Line	Toggle Expand	Toggle Show All/Alert	X Ignore Customer	Sales Cycle Lines	

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*):

🔎 Search 🛛 🗎 P	osted Invoices	🗎 Shipments			Ŀ	· V
Document Type ↑	Document No.↑	Customer No.	Customer Name	Archive Version	Archive Lines	Statu
Quote	1004	10000	The Cannon Group PLC	1	1	Wor
Quote	1005	10000	The Cannon Group PLC	1	1	Lost
Quote	1006	10000	The Cannon Group PLC	1	1	Wor
<u>Order</u>	1002	10000	The Cannon Group PLC	1	1	
Order	1003	10000	The Cannon Group PLC	0	0	

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*):

Γ	Why was the order lost? (PRICE HIGH		~	1
; <u>, }</u>		[Yes	No	e

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*):

🔎 Search	Posted Invoices	Shipments 🗎			Ŕ	7 =
Document Type 1 T	Document No. †	Customer No.	Customer Name	Archive Version	Archive Lines	Status
Quote	1004	10000	The Cannon Group PLC	1	1	Won
Quote	1005	10000	The Cannon Group PLC	1	1	Lost
Quote	1006	10000	The Cannon Group PLC	1	1	Won
Quote	1007	20000	Selangorian Ltd.	1	1	Won
Quote	1008	30000	John Haddock Insurance Co.	1	2	Won





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.

CRONUS Int	ternational Ltd	. 🗆 🗏			
SD BI Sales Co	ockpit Manager	Activity Panel			
				Alert Actions	
Customers on Alert	Apr-2022 LCY - ALL	Mar-2022 LCY - ALL	Feb-2022 LCY - ALL	í	
6	781.40	554.50	2,000.00	Page Filters	Refresh Setup
>	- <u>-</u> -	→	>		
Sales Cycle - Quo	tes				
Issued LCY - 3 Months	Won LCY - 3 Months	Lost LCY - 3 Months	lssued - 3 Months	Won - 3 Months	Lost - 3 Months
2,912.43	2,631.03	281.40	5	4	1
>	- · ·	>	>	>	→
Sales Cycle - Orde	ers				
Orders Created LCY	Orders Count Created	Orders Remain LCY	Created LCY Apr-2022	Created LCY Mar-2022	Remaining Mar-2 - Apr-2022
2,631.03	4	2,631.03	2,631.03	0.00	2,631.03
		>	>		>

Figure 6-20

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

lssued LCY - 3 Months	Won LCY - 3 Months	Lost LCY - 3 Months	Issued - 3 Months	Won - 3 Months	Lost - 3 Months
2,912.43	2,631.03	281.40	5	4	1
	>	>	>	>	>







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

Orders Created LCY 2,631.03	Orders Count Created	Orders Remain LCY 2,631.03	Created LCY Apr-2022 2,631.03	Created LCY Mar-2022	Remaining Mar-2 - Apr-2022 2,631.03
>	→ →	>	>	>	>

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*):

SD BI Sales Cockpit Manager Activity Panel Alert Actions Customers on Apr-2022 LCY - Mar-2022 LCY - Feb-2022 LCY -
Customers on Alert ALL Mar-2022 LCY - ALL ALL Feb-2022 LCY - ALL Gi Gi
6 781.40 554.50 2,000.00 Page Filters Refresh

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*):

lesperson Filters		
lesperson Time Period	Month	~
t Salesperson Filter (All)		
uote and Order Filters		
uote Time Period	3 Month	~
der Time Period	Month	~
istomer No.		\sim
		OK Cancel

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*):

				Alert Actions			
Customers on Alert	Apr-2022 LCY - ALL	Mar-2022 LCY - ALL	Feb-2022 LCY - ALL	(j)	\bigcirc	ŝ	
6	781.40	554.50	2,000.00	Page Filters	Refresh	Setup	
	>	>	→				

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*):

lssued LCY - 3 Months	Won LCY - 3 Months	Lost LCY - 3 Months	Issued - 3 Months	Won - 3 Months	Lost - 3 Months
2,912.43	2,631.03	281.40	5	4	1
	>	>	>	>	>
-	s Orders Count	Orders Remain	Created LCY	Created LCY	Remaining Mar-2
Orders Created		Orders Remain LCY	Created LCY Apr-2022	Mar-2022	Remaining Mar-2 - Apr-2022
ales Cycle - Order Orders Created LCY 2,631.03	Orders Count				

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*).

ho Search + New	🐯 Edit List	🔟 Delete 🛛 🤁 Reload	More options		Ŀ	\ ≣
Object Type				All		
Ŷ	Object ID	Object Name	Service Name 1	Ten	Pub	OData V
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*):





				Alert Actions		
ustomers on lert	May-2022 LCY - ALL	Apr-2022 LCY - ALL	Mar-2022 LCY - ALL	(j)	\bigcirc	energia a
5	5,477.40	2,429.90	1,990.80	Page Filters	Refresh	Setup
	>	→	>			
es Cycle - Order rders Created Y	s Orders Count Created	Orders Remain LCY	Created LCY May-2022	Created LCY Apr-2022	Remaining Ap - May-2022	or-2
),333.40	13	2,372.90	3,366.50	3,662.90	3,605.90	
	<u>→</u>	>	>	>	>	<u> </u>
ights						
wer BI Reni	ort FactBox 🗸	Selesperan Al				
extend and hempedit by Merthyser	-	KE Looston, Cole				
weet Diffeet						
sector and homeouth by Marchyse month & homeouth	ler 2011 ins 2020 key 2020 Matchyner					
unitaria de la managementaria de la management Enterna de la managementaria de la managementa	int and the state by all at Machiner	kensalesista ani kenyoti ky yer Rocolomo (konyoti				

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*).

totalsales by Customer_N	ame		√ Filters	>>
0.67K		Customer_Name The Cannon Group PLC		
1.6K (1.76%)(0:74%)	/ 17.1K (18.82%)	Hotel Pferdesee	,	
2.58K (2.84%) 4.33K (4.77%)	17.1K (10.02.70)			
4.53K (4.77%) 6K		 Designstudio Gmunden Klubben 	Filters on all pages	
(6.6%)			CLE_Global_Dimension \	< Q
		Selangorian Ltd.	is (All)	
		John Haddock Insuranc	CLE_Global_Dimension \	~ Q
6.14K (6.76%)	14.4K	Beef House	is (All)	
	(15.859			0
6.51K (7.17%)		 Antarcticopy 	is (All)	
	- 13.73K (15.12%)	 Heimilisprydi 		
11.77K (12.96%)/		BYT-KOMPLET s.r.o.		
Beef House	6,000.00			
BYT-KOMPLET s.r.o.	1,602.90			
Deerfield Graphics Company	1,063.10			
Designstudio Gmunden	13,732.60			
Designstudio Gmunden Englunds Kontorsmöbler AB	13,732.60 673.71			
Designstudio Gmunden Englunds Kontorsmöbler AB Gagn & Gaman	13,732.60 673.71 877.32			
Designstudio Gmunden Englunds Kontorsmöbler AB	13,732.60 673.71			
Designstudio Gmunden Englunds Kontorsmöbler AB Gagn & Gaman Guildford Water Department Heimilisprydi Hotel Pferdesee	13,732.60 673.71 877.32 533.40 2,024.21 14.395.75	ļ		
Designstudio Gmunden Englunds Kontorsmöbler AB Gagn & Gaman Guildford Water Department Heimilisprydi	13,732.60 673.71 877.32 533.40 2,024.21	,		

Figure 6-29



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