User Guide for Microsoft Dynamics 365 Business Central

Product: SD BI Inventory Cockpit

Release: D365 BC V24+

Revision: November 2024

1 Contents

2 Getting Started

Standard Microsoft Dynamics 365 Business Central does not alert for overstocked items or items with a short shelf-life but using 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. You can choose to alert by item or SKU.

Another feature in SD BI Inventory Cockpit that standard Microsoft Dynamics 365 Business Central does not handle is the ability to monitor and generate alerts on items where the sales level has dropped for an item by more than a defined percentage against a prior period (Cliff Alerts).

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

You can also setup and monitor quantity based Sales Trends for Historical and Forecast Periods using date formulas to calculate the period groupings.

Items can be flagged as new or established determined by an extension to the Item Templates where you can define a Sales Period length and Dimension Codes and Values. SD BI Inventory Cockpit checks for first sales date versus the Sales Period for the newly created item and updates the item from new to established in an Item Lifecycle Log.

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.

3 Installing SD BI Inventory Cockpit

SD BI Inventory Cockpit, is available to download from AppSource or you can install the app from within Business Central using Extension Marketplace.

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

3.1 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)*.

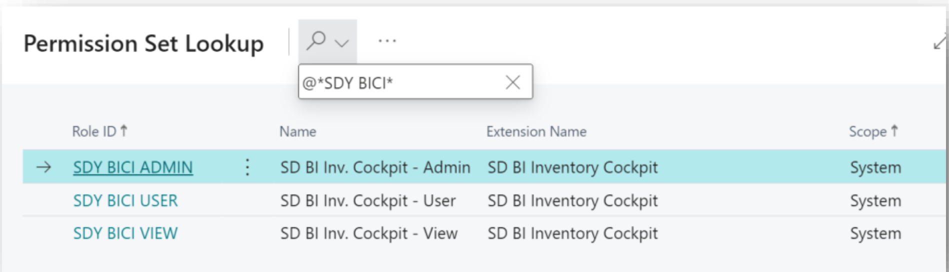


Figure 3-1

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.

3.2 Choosing the SD BI Inventory Cockpit Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** *(Figure 3-2)*.

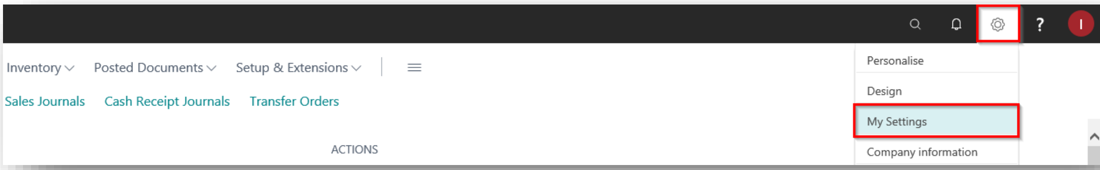


Figure 3-2

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 3-3)*.

Figure 3-3

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

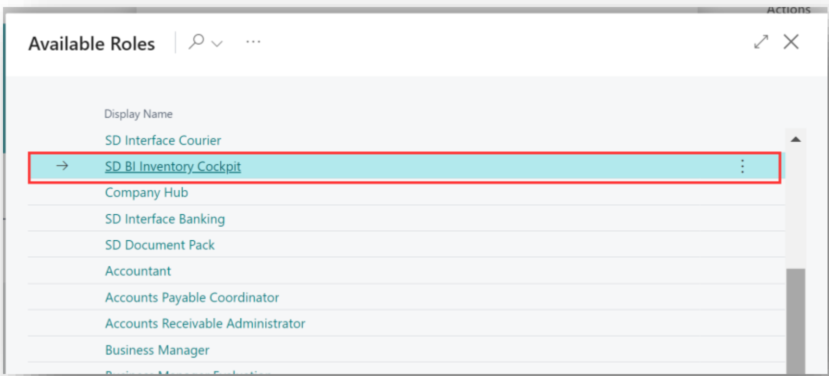


Figure 3-4

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 3-5)*.

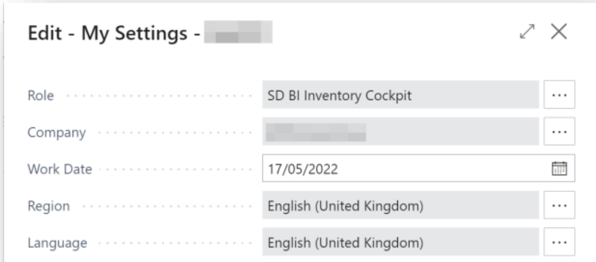


Figure 3-5

3.3 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 3-6)*.

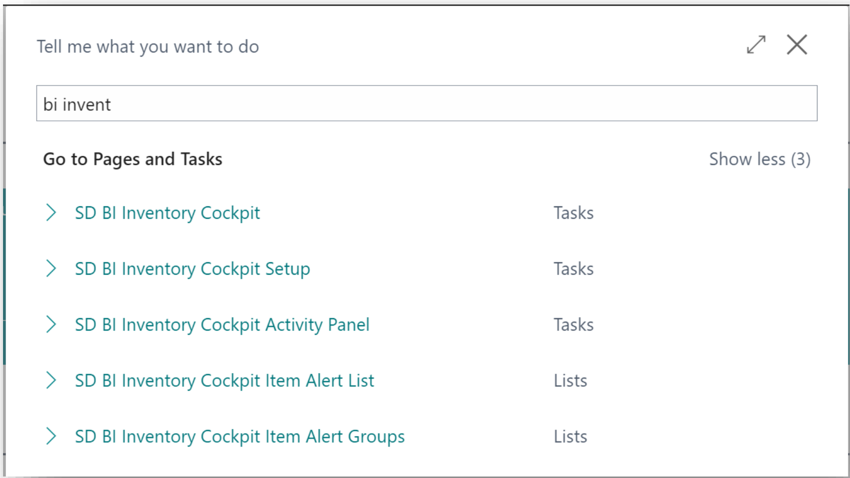


Figure 3-6

3.4 Bookmarking the SD BI Inventory Cockpit Pages to Your Role Centre

For easy access to SD BI Inventory Cockpit, you can bookmark the SD BI Inventory Cockpit Activity Panel to your default Role Centre.

Search for **inventory activity** in the Tell Me and choose the Book Mark action to the right of the result *(Figure 3-7)*.

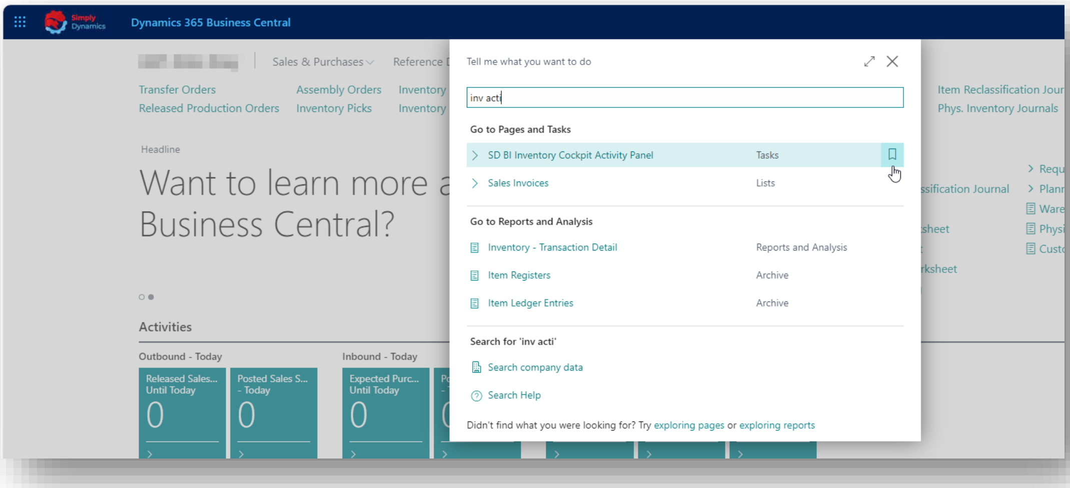


Figure 3-7

The SD BI Inventory Cockpit pages are now available in the navigation menu on your Role Centre *(Figure 3-8)*.

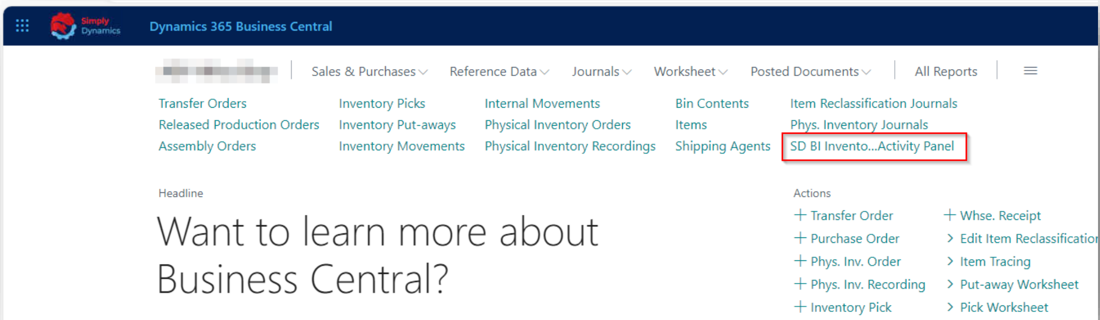


Figure 3-8

3.5 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. 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 3-9)*.

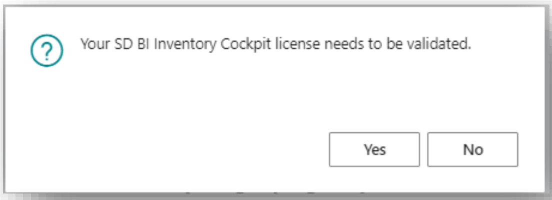


Figure 3-9

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

3.5.1 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:

1. In the **Activate your Product** page *(Figure 3-10)*
   Enter your company name in **Company Name.**
   Enter your company email in **Email.**
   Choose **Free Trial.**

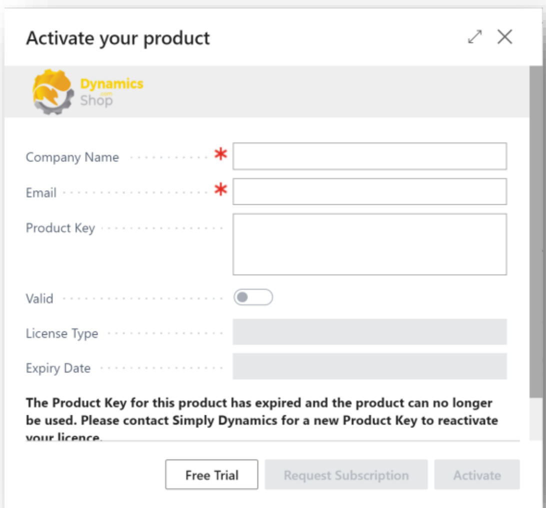


Figure 3-10

2. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** *(Figure 3-11)*.

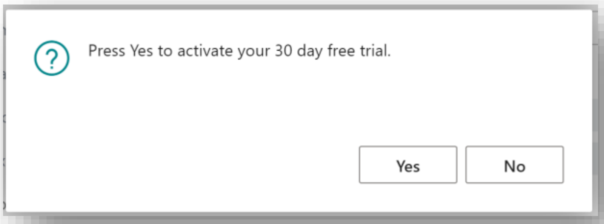


Figure 3-11

3. 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 3-12)*.

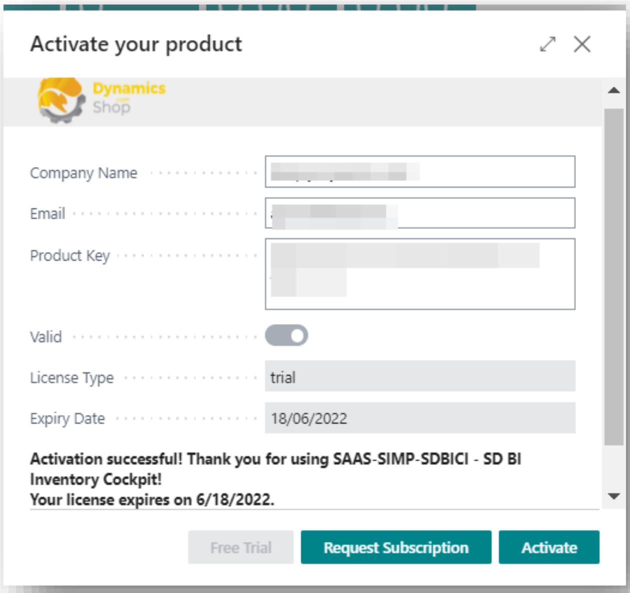


Figure 3-12

4. Choose **Finish** to exit the page.

5. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

3.5.2 Activating the SD BI Inventory Cockpit Licence with a Product Key

Take the following steps if you have received a Product Key from Simply Dynamics Ltd.:

1. In the **Activate your product** page *(Figure 3-13)*
   Enter your company name in **Company Name**
   Enter your company email in **Email.**
   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**.

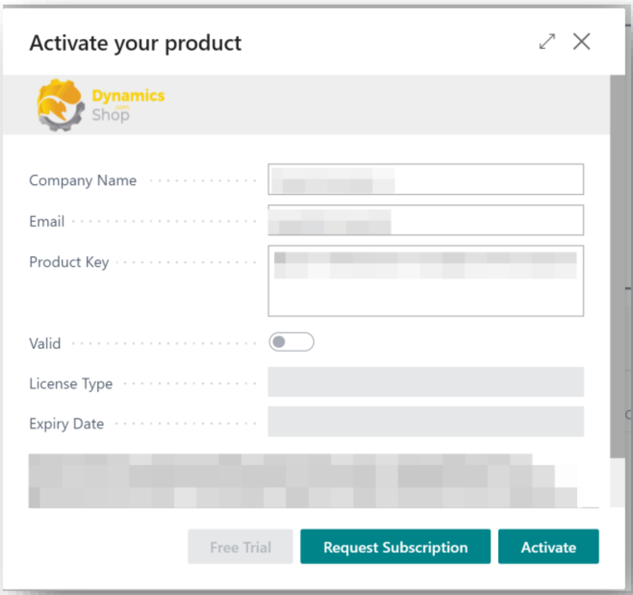


Figure 3-13

2. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the expiry date of your subscription licence.

3. Choose **Finish** to exit the page.

4 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.

4.1 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** In the **SD BI Inventory Cockpit Setup** page, expand the **General** FastTab. The **General** FastTab contains the following fields (*Figure 4-1*):

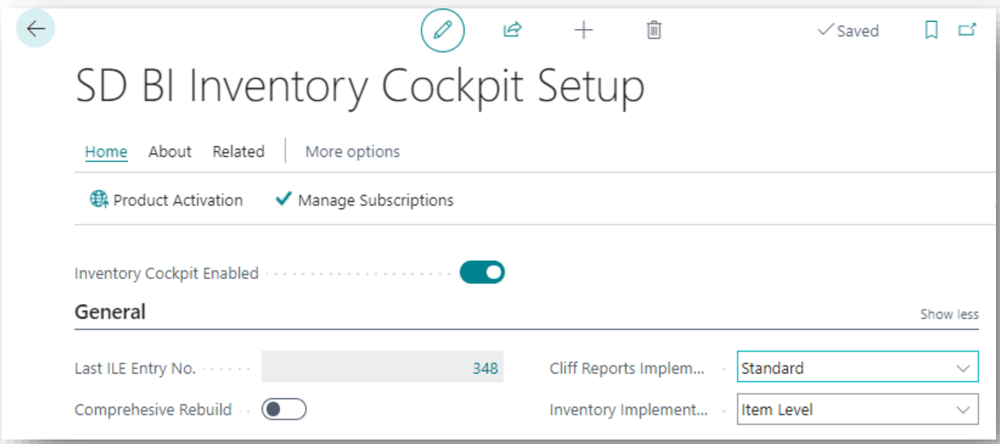


Figure 4-1

- **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 to calculate the **Inventory Alerts**. Choose from an option of **Item Level** or **SKU Level**. This field allows for easy creation of extensions if needed for specific bespoke requests. If you change the **Inventory Implementation** option here in the Setup card, you then need to choose the Refresh action in the **SD BI Inventory Cockpit Role Centre** or in the **SD BI Inventory Cockpit Activity Panel** to refresh the alerts and display the relevant cues.

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 Days** 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 4-2*):

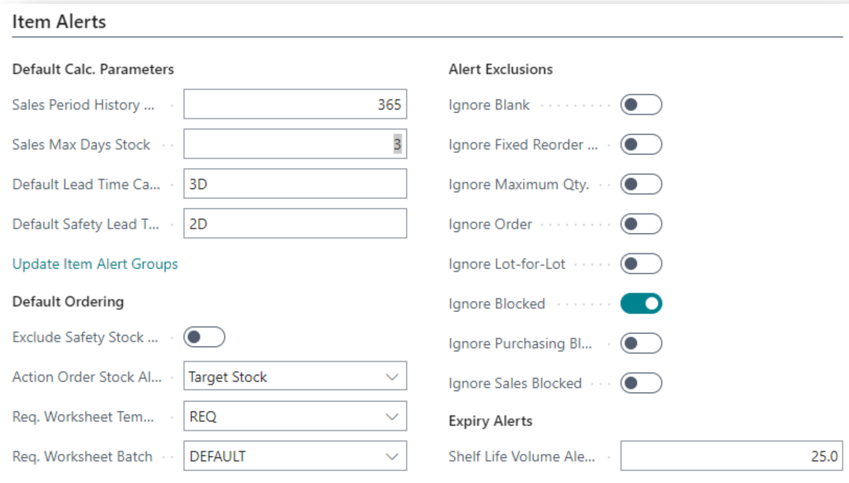


Figure 4-2

- **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**. SD BI Inventory Cockpit will use the **Sales Period History Days** in the **Item Alert Groups** if one exists for the relevant Item Category.

- **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**– 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 **Target Stock** or **Free Stock**.

If **Target Stock** is chosen, then if **Free Stock < Target Stock** an **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**.

- **Ignore Fixed Reorder Qty.** – Choose this option if you want to exclude items from the alert calculations that have the **Reordering Policy** on the Item card set to **Fixed Reorder Qty.**

- **Ignore Maximum Qty.** – Choose this option if you want to exclude items from the alert calculations with the **Reordering Policy** on the Item card set to **Maximum Qty.**

- **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**.

- **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**.

- **Ignore Blocked**– Choose this option if you want to exclude those items from the alert calculations that have the **Blocked** option on the Item card switched on.

- **Ignore Purchasing Blocked**– Choose this option if you want to exclude items from the alert calculations that have the **Purchasing Blocked** option on the Item card switched on.

- **Ignore Sales Blocked**– Choose this option if you want to exclude those items from the alert calculations that have the **Sales Blocked** option on the Item card switched on.

- **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 **Sales Trend DateFormula Setup** FastTab, you define the **Historical Periods** and **Forecast Periods**, expressed in DateFormulas, which are then used as filters to sum the Quantity in the Item Ledger Entry for a line of Type Sale for Historical Periods and as filters to sum the Quantity in the Budget Entry for Forecast Periods (*Figure 4-3*).

The **Sales Trend KPIs** are surfaced in a **Sales Trend FactBox** on the **Item Alert List** page. Choose the Assisted Setup to the right of the Period End field to see the results of the DateFormula for each period.

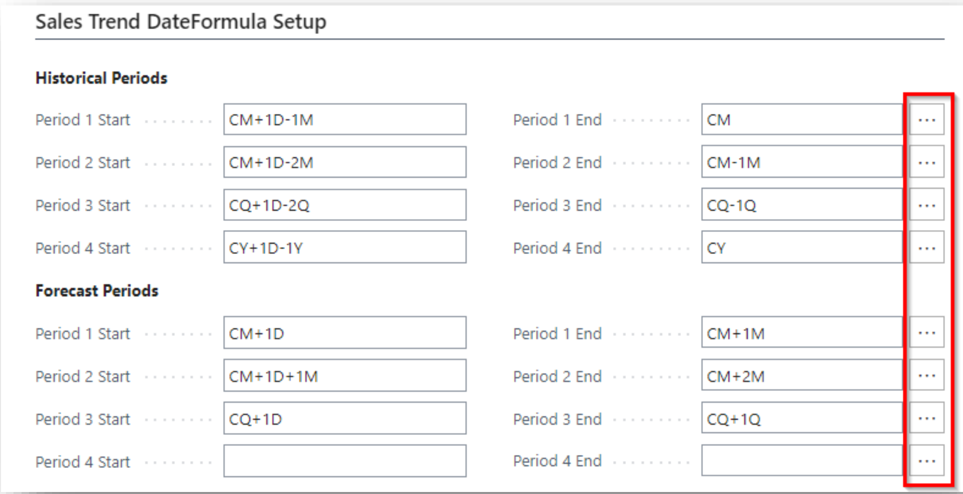


Figure 4-3

In the **Sales Trend Captions** FastTab, you define the captions that will display for the related Sales Trend KPIs surfaced in a **Sales Trend FactBox** on the **Item Alert List** page (*Figure 4-4*).

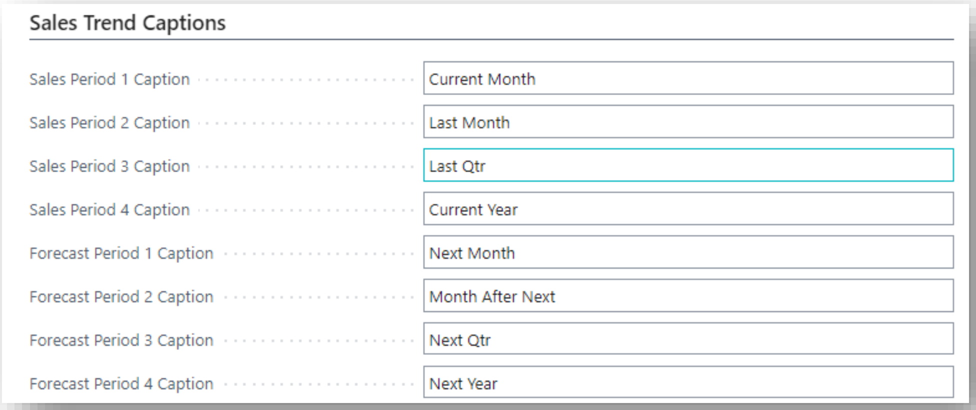


Figure 4-4

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 4-5*):

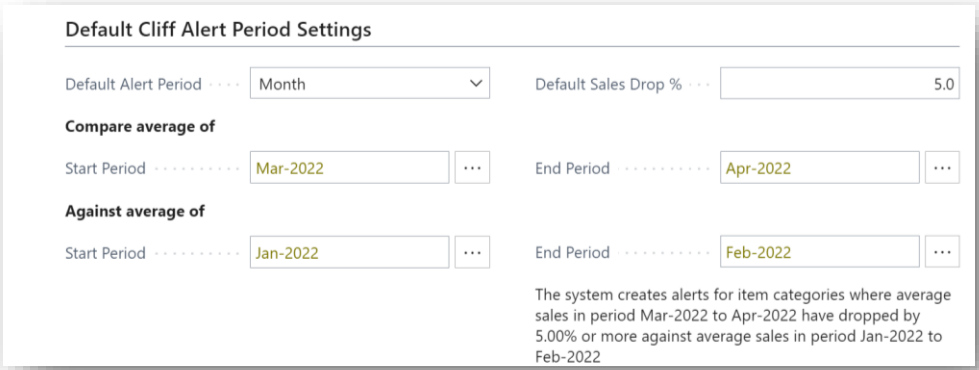


Figure 4-5

- **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 4-6*):

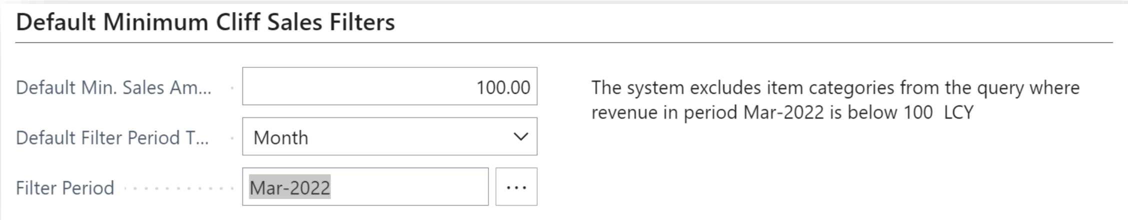


Figure 4-6

- **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 4-7*):

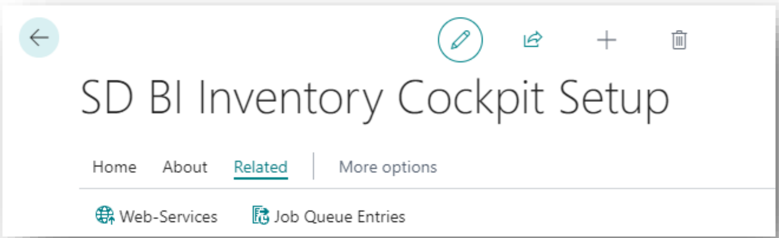


Figure 4-7

- **Web Services** – Choose this action to open the standard Dynamics 365 Business Centre Web Services page (*Figure 4-8*). When this action is selected, SD BI Inventory Cockpit publishes web services that can be used to build Power BI Reports. These web services are used to feed a ready-made set of Power BI Dashboards.

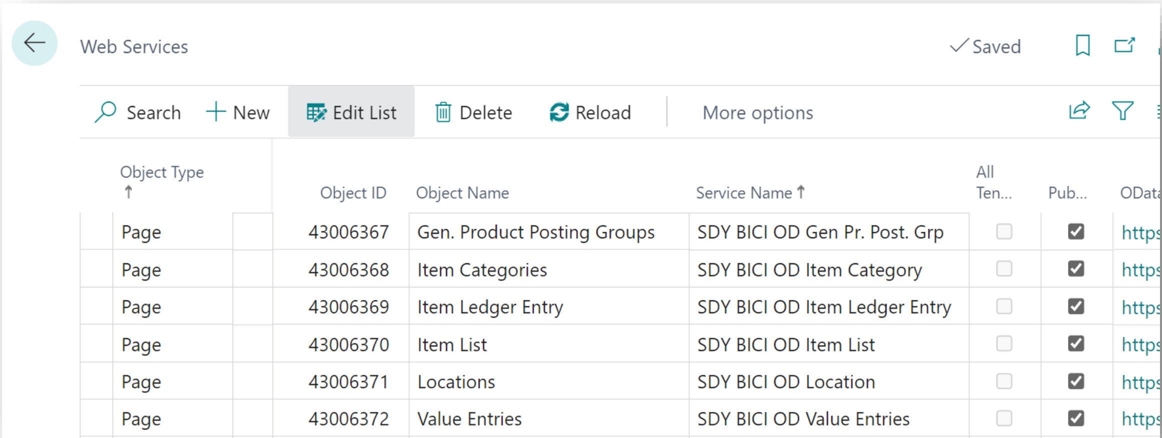


Figure 4-8

- **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 4-9*). Alternatively, you can choose the Refresh action button on the SD BI Inventory Cockpit Role Centre during the day to refresh the data.

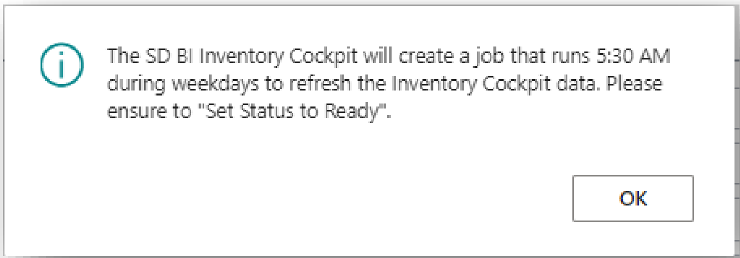


Figure 4-9

4.2 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, the **Managed SKUs** 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 (or SKUs, depending on the **Inventory Implementation** chosen in the **SD BI Inventory Cockpit Setup** card) and to create the Alerts (*Figure 4-10*).

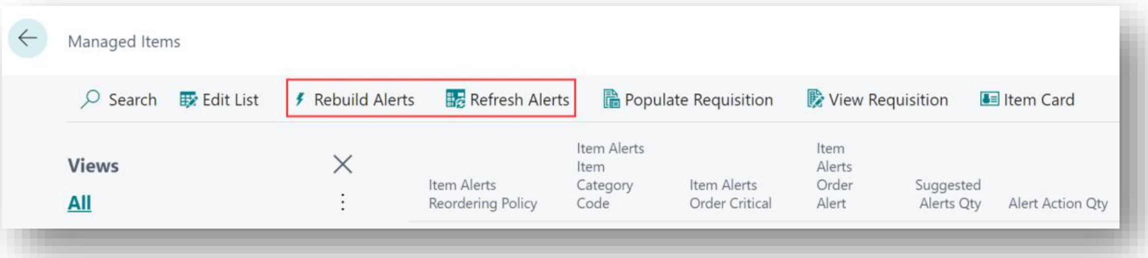


Figure 4-10

- **Rebuild Alerts** – The Managed Items List is cleared; the Items are 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 4-11*).

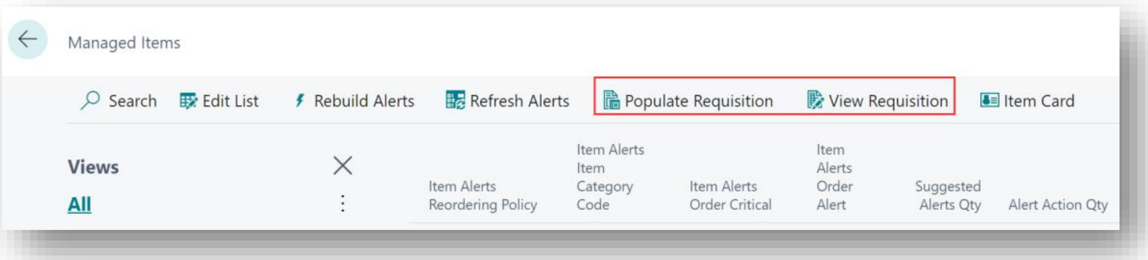


Figure 4-11

- **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 4-12*).

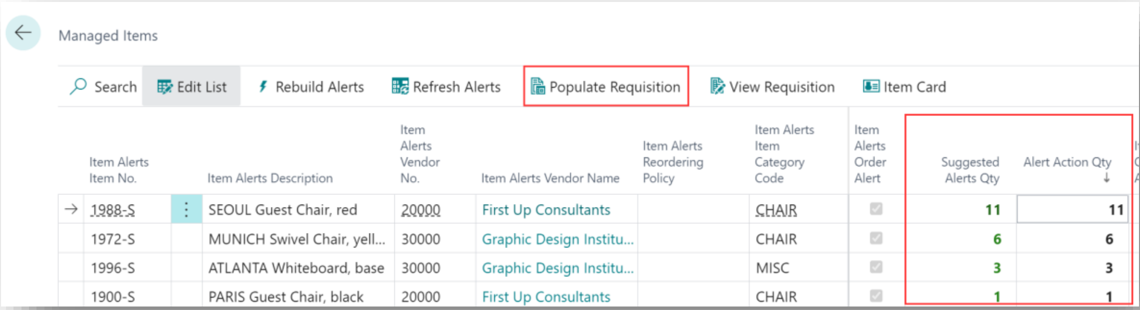


Figure 4-12

- **View Requisition** – Choose this option to open existing Requisition Worksheets (*Figure 4-13*).

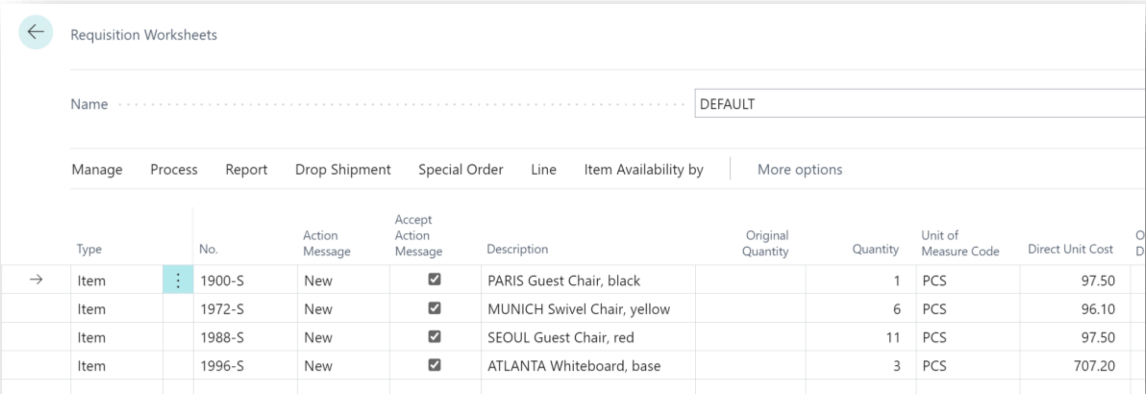


Figure 4-13

FactBoxes in the Managed Items and Managed SKUs list provide further details on the Sales Trends (*Figure 4-14*)

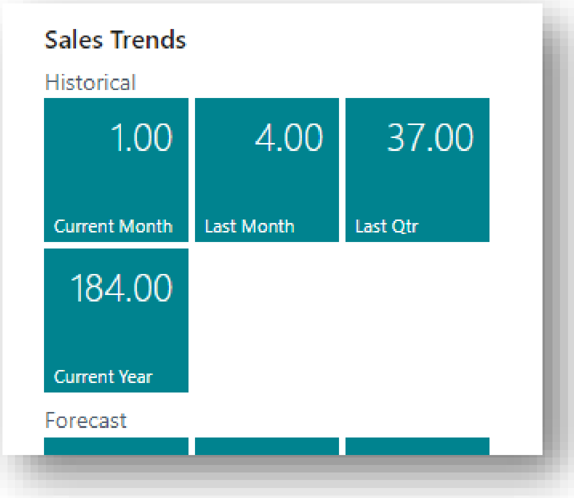


Figure 4-14

and the Alerts raised (*Figure 4-15*).

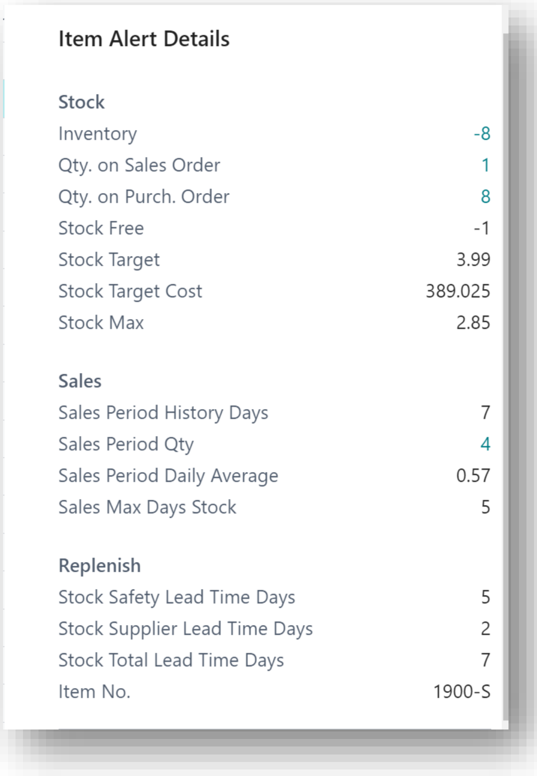
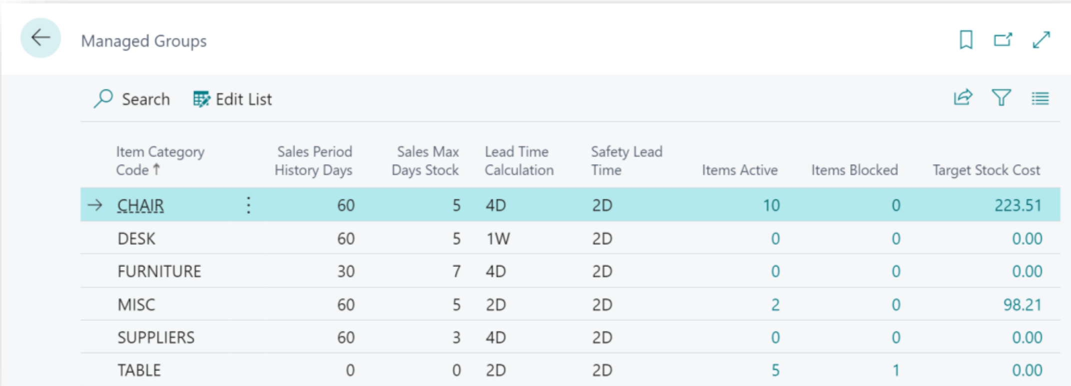


Figure 4-15

4.3 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 or the Managed SKUs 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 4-16*).



Item Category Code	Sales Period History Days	Sales Max Days Stock	Lead Time Calculation	Safety Lead Time	Items Active	Items Blocked	Target Stock Cost
CHAIR	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 4-16

4.4 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 4-17*):

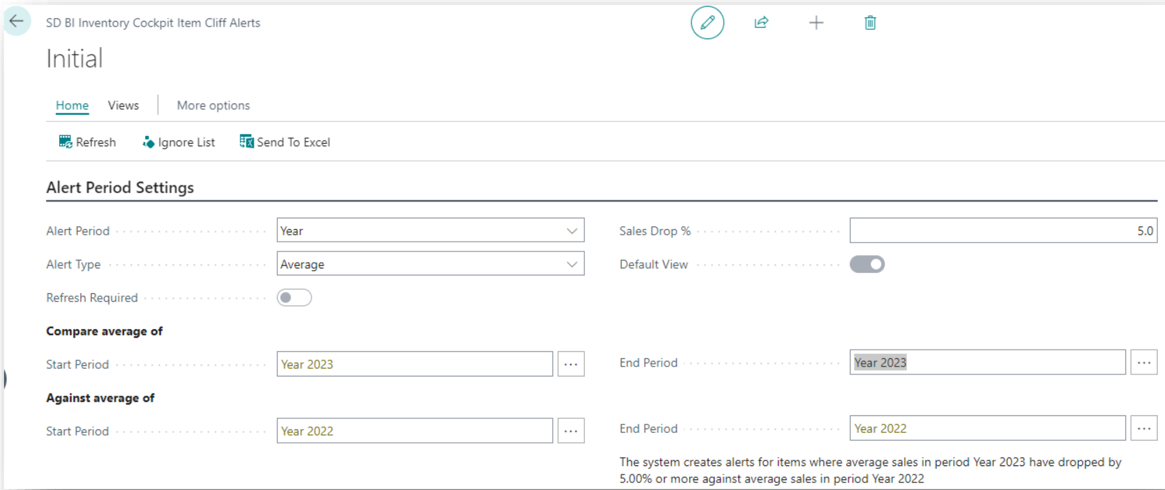


Figure 4-17

- **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 4-18*):

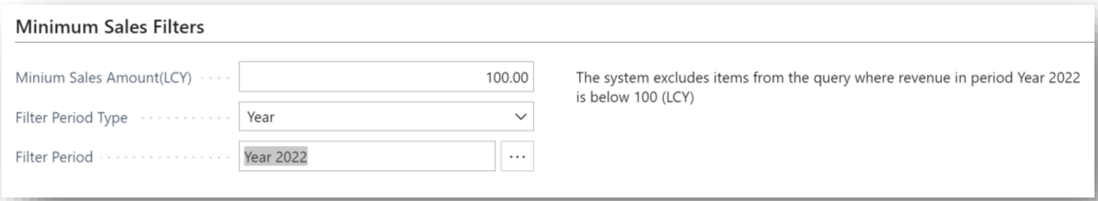


Figure 4-18

- **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 4-19)*. When you choose to create a New View, the View is created with the default values from the SD BI Inventory Cockpit.

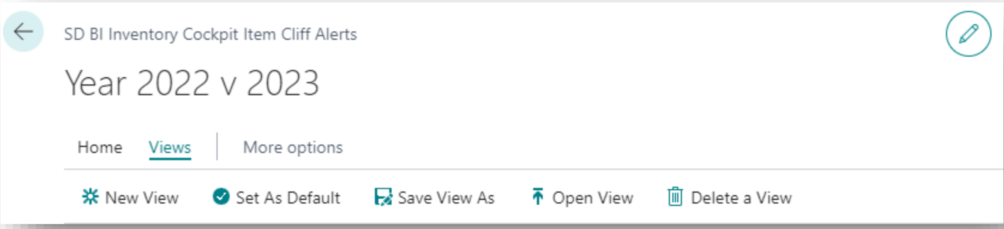


Figure 4-19

When you are ready to calculate the Customer Alerts, from the **Process** menu group, choose **Refresh** (*Figure 4-20*).

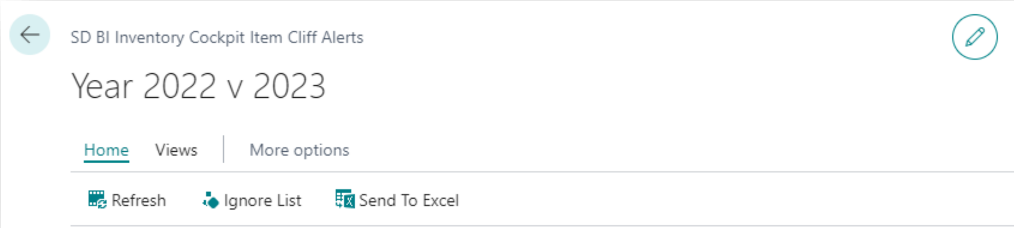
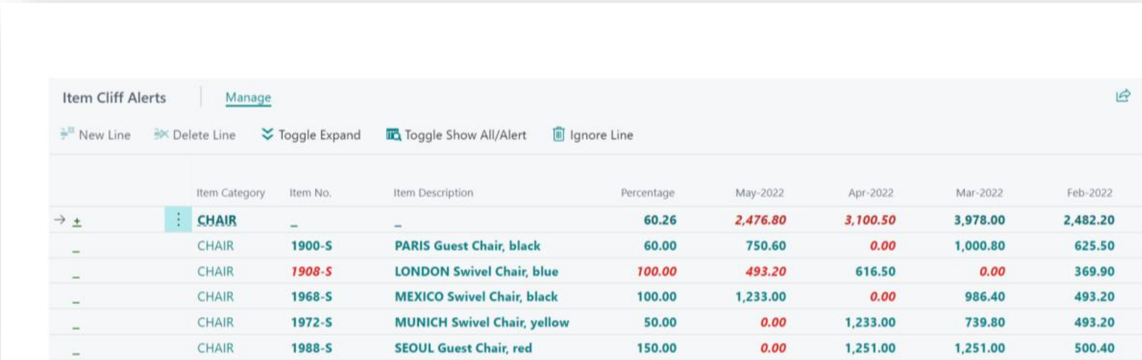


Figure 4-20

The Item Alerts are displayed (*Figure 4-21*).



Item Category	Item No.	Item Description	Percentage	May-2022	Apr-2022	Mar-2022	Feb-2022
CHAIR	_	_	60.26	2,476.80	3,100.50	3,978.00	2,482.20
CHAIR	1900-S	PARIS Guest Chair, black	60.00	750.60	0.00	1,000.80	625.50
CHAIR	1908-S	LONDON Swivel Chair, blue	100.00	493.20	616.50	0.00	369.90
CHAIR	1968-S	MEXICO Swivel Chair, black	100.00	1,233.00	0.00	986.40	493.20
CHAIR	1972-S	MUNICH Swivel Chair, yellow	50.00	0.00	1,233.00	739.80	493.20
CHAIR	1988-S	SEOUL Guest Chair, red	150.00	0.00	1,251.00	1,251.00	500.40

Figure 4-21

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.

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.

4.5 Flagging Items as New and Established

Items can be flagged as new or established by an extension to the Item Templates where you can define a Sales Period length and Dimension Codes and Values (*Figure 4-22*).

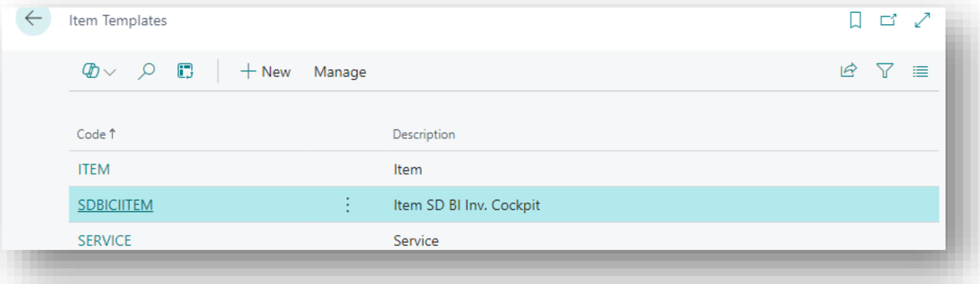


Figure 4-22

The fields on the SDBICIITEM template have been extended onto your existing item templates and are also available on newly created item templates (*Figure 4-23*).

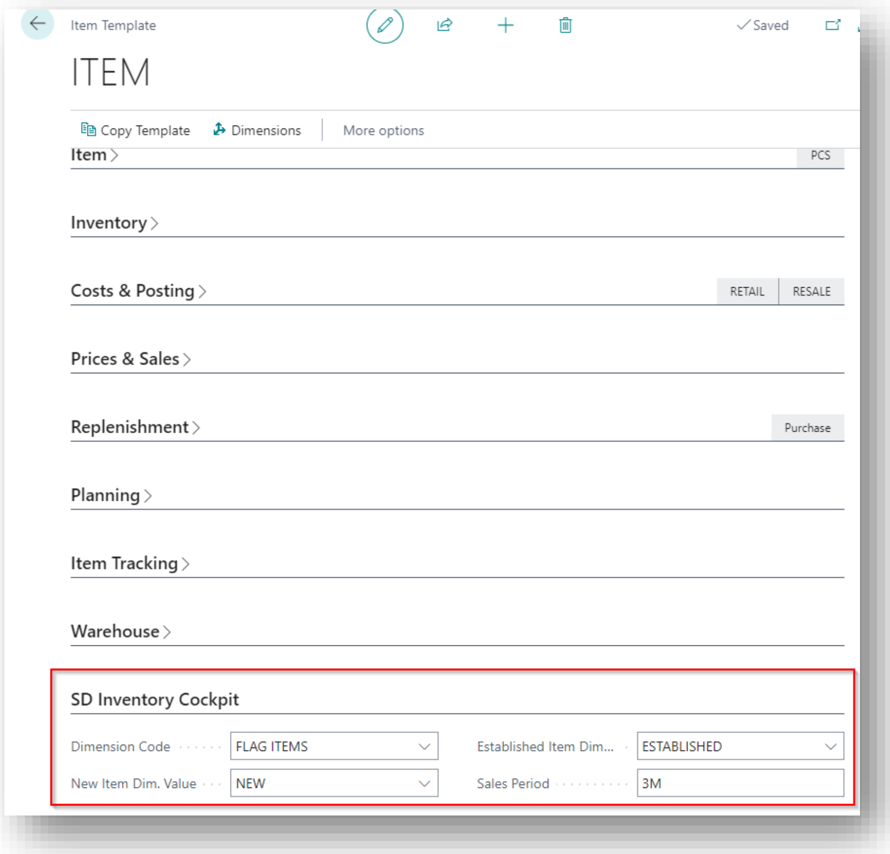


Figure 4-23

- **Dimension Code** – Create a dimension code and values used to flag items as new or established.

- **New Item Dimension Value** – Choose the dimension value that will be used to flag items as new.

- **Established Item Dimension Value** - Choose the dimension value that will be used to flag items as established.

- **Sales Period** – Define the sales period length expressed as a date formula used to determine when the item moves from new to established.

These fields are stamped on an extension of the Item Card when an Item is created using the Template (*Figure 4-24*).

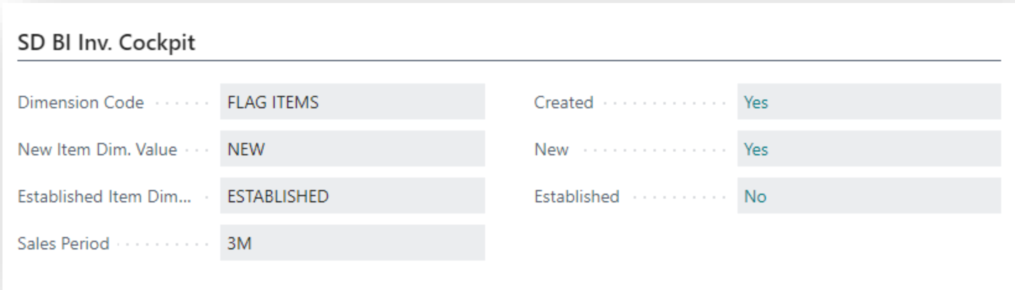


Figure 4-24

When the **Refresh** action is run in the Role Centre, or a Job Queue running the SDY UTPBI Item Lifecycle Mgt. Codeunit is run, or when the **Process All** action in the Item Lifecycle List is chosen, SD BI Inventory Cockpit flags an item as new when an item ledger entry record of entry type sale is created for the item. New items move to established when the first sales date has exceeded the time defined in the Sales Period. The Item Lifecycle table logs items by Status, Created Date, First Sale Date, and Established Date (*Figure 4-25*).

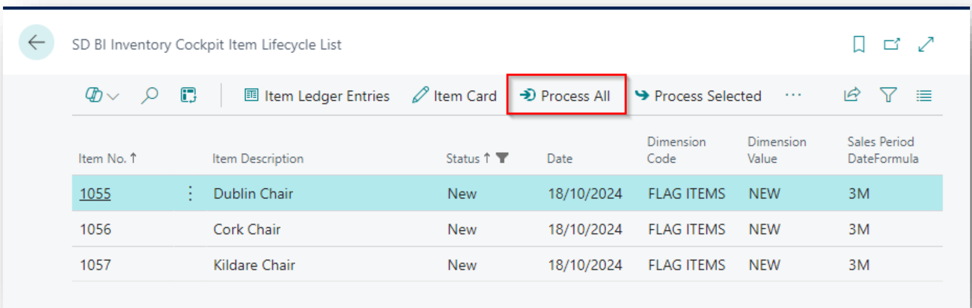


Figure 4-25

For preexisting items created without the SD BI Inventory Cockpit extension to the Item Templates, the Item Lifecycle Upgrade report from the Inventory Cockpit Setup Card can be run to create entries in the Item Lifecycle Log (*Figure 4-26*).

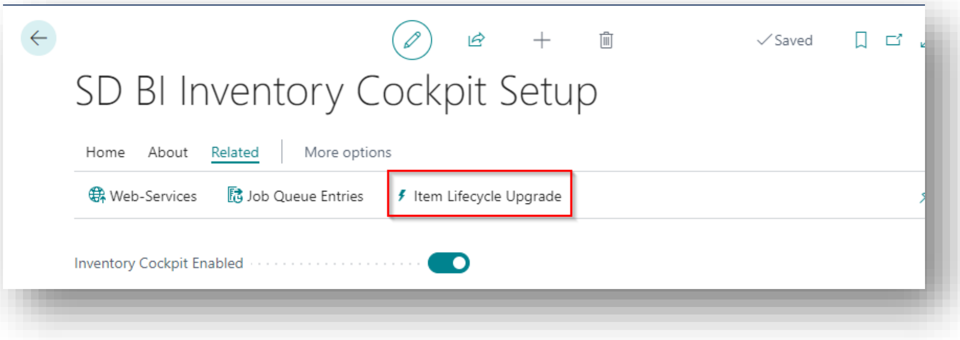


Figure 4-26

When the Item Lifecycle Upgrade report viewer dialog opens enter the item or item category code to add items to the Item Lifecycle Log (*Figure 4-27*).

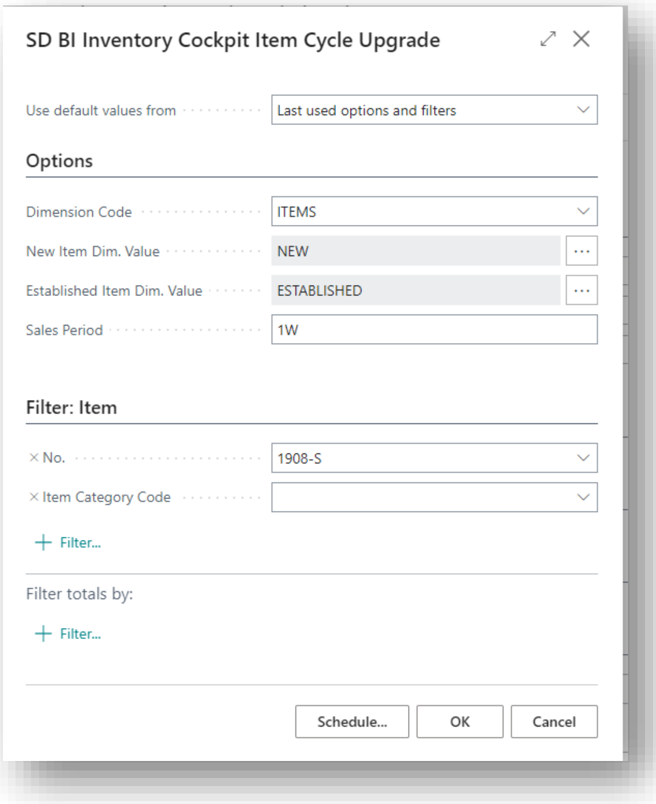
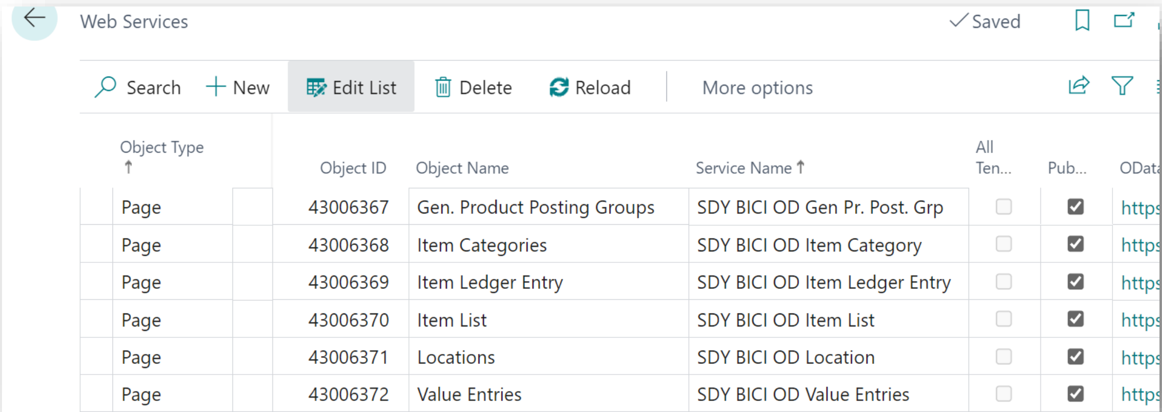


Figure 4-27

4.6 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 six pages published as OData Webservices (*Figure 4-28*).



Object Type	Object ID	Object Name	Service Name	All Ten...	Pub...	ODat
Page	43006367	Gen. Product Posting Groups	SDY BICI OD Gen Pr. Post. Grp	☐	☑	https
Page	43006368	Item Categories	SDY BICI OD Item Category	☐	☑	https
Page	43006369	Item Ledger Entry	SDY BICI OD Item Ledger Entry	☐	☑	https
Page	43006370	Item List	SDY BICI OD Item List	☐	☑	https
Page	43006371	Locations	SDY BICI OD Location	☐	☑	https
Page	43006372	Value Entries	SDY BICI OD Value Entries	☐	☑	https

Figure 4-28

We can provide you with a ready-made set of Power BI Dashboards fed via the ODATA Feeds above (*Figure 4-29*).

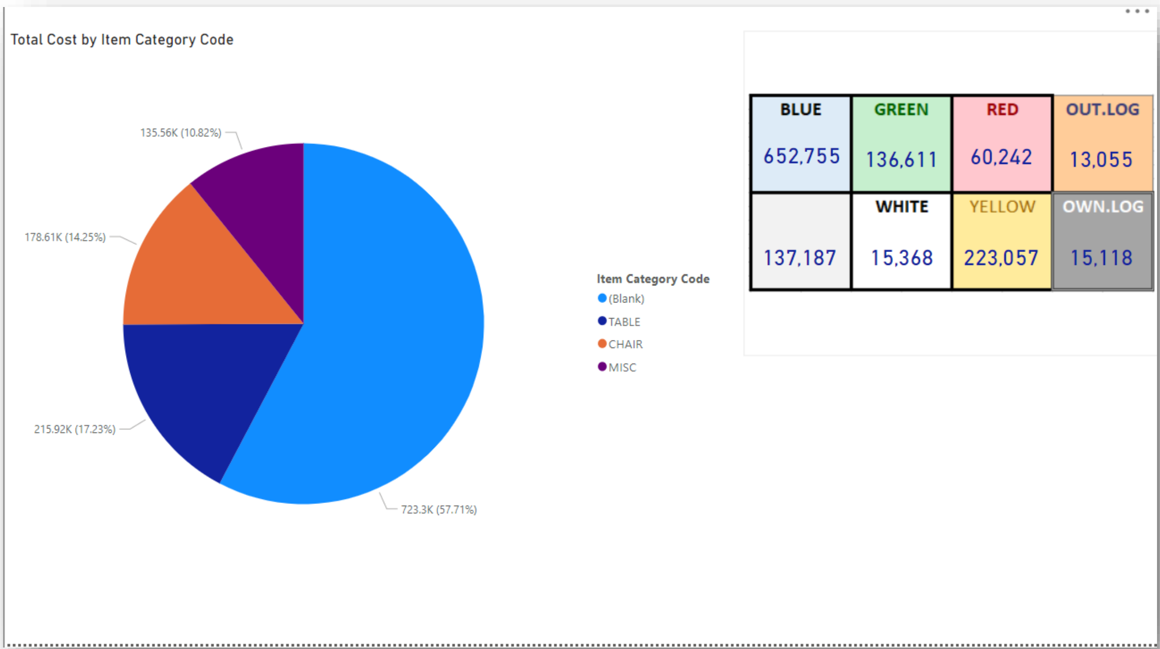


Figure 4-29

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)*.

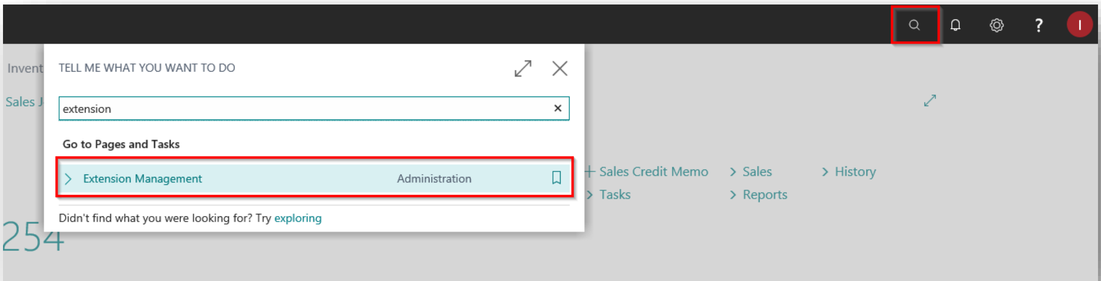


Figure 5-1

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*).

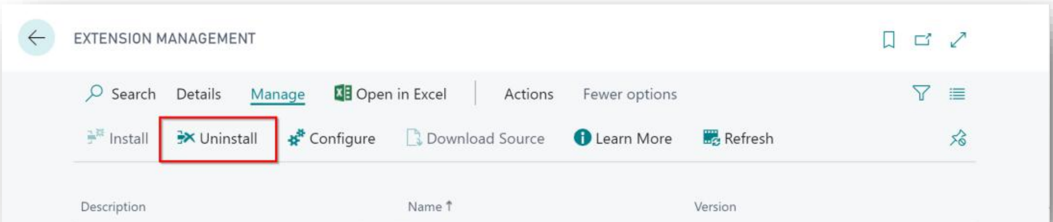


Figure 5-2

Dynamics Shop

IT Simply Makes Business Sense with Microsoft Dynamics 365

Simply Dynamics

Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.

Dynamics Shop

DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.

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DynAzure delivers cloud only, low cost & standardised model rapid deployment Dynamics 365 Projects and support utilising standard features and enhanced Apps.

Dublin Location

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Get Directions

+353 1 687 6600

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