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| Document | iDynamics Removal of Sales Order Remains | | |
| Title | <i>User's guide</i> | | |
| Class. | Microsoft Dynamics 365 Business Central | | |
| Code | IN-KUS | Date | 4 DE FEBRERO DE 2019 |

***IDYNAMICS REMOVAL OF SALES ORDER
REMAINS
USERS' GUIDE***

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Author Name: **DPT. I+D+I**



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INDEX

| | |
|--|----------|
| INTRODUCTION | 3 |
| EXAMPLES OF USE CASES COVERED BY THE EXTENSION: | 3 |
| SETUP | 3 |
| SETUP BY CUSTOMER | 4 |
| SALES ORDERS | 5 |
| USAGE | 6 |
| AUTOMATIC DELETION WHEN REGISTERING | 6 |
| MANUAL REMOVAL OF ORDER REMAINS | 6 |
| MANUAL EXECUTION OF THE REMAINS REMOVAL PROCESS | 7 |
| SCHEDULED REMAINS REMOVAL | 7 |



| | | | |
|----------|--|------|----------------------|
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Introduction

The *Removal of Sales Order Remains* extension allows you to automatically or semi-automatically remove quantities of sales orders in which there exists lines that have been partially served and that, according to the criteria defined in the application, are no longer considered to be being served.

To cancel the outstanding quantities, the extension will remove or modify the sales order lines, along with the associated records (tracking lines, shipping lines and/or warehouse picking) that may exist.

iDynamics Removal of Sales Order Remains is fast to implement, easy to configure, and improves employee productivity. In this section, you will find information that will help you configure and use iDynamics Removal of Sales Order Remains in your company. And if you are a partner or customer who needs to extend this functionality, you will find relevant information in the *Developers* section.

| | |
|-----------------------|---|
| User's guide | <ul style="list-style-type: none">- Setup- Usage |
| Partners & Developers | <ul style="list-style-type: none">- Functional description- Implementation- Customization |
| Support | <ul style="list-style-type: none">- Support and Contact info |

Examples of use cases covered by the extension:

- Customers who work with weighing or measuring products, who receive orders with round quantities (e.g. 3kg of sand) but serve or invoice the exact quantity of products (e.g. 2.98kg of sand). In this case, the extension would automatically eliminate the 0.02kg remaining to be served, giving the order as closed.
- Customers who, due to the type of product, may leave small quantities pending to be served and who wish to be able to cancel, in an automated manner, those orders that follow certain quantity and age criteria (e.g. orders with less than 2 units pending to be served for 3 months).

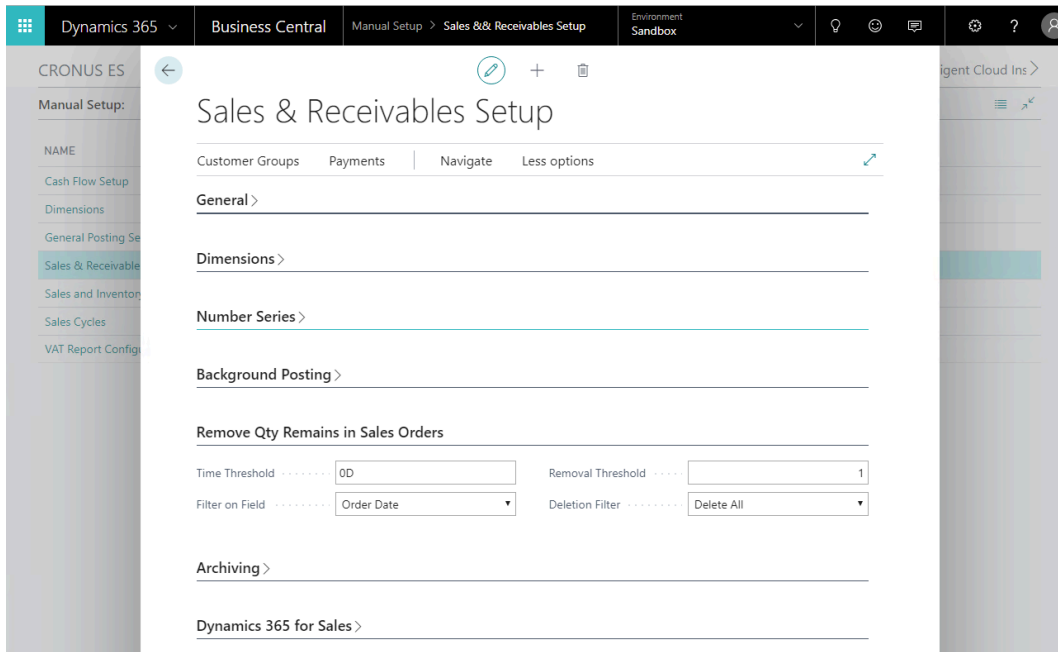
Setup

Once the extension is installed, the first step will be to configure it. For that we go to the manual setup section and filter by Dynamics "Removal of Sales Order Remains".



| | | | |
|----------|--|------|----------------------|
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| Title | User's guide | | |
| Class. | Microsoft Dynamics 365 Business Central | | |
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It is possible to access this card by navigating to the sales and collections setup, where we will have a new block of fields available with the title "Removal of sales order remains".



The available fields are as follows:

- **Time threshold.** With the default value (OD), the extension will launch the Removal of Sales Order Remains process each time an order is shipped. If, on the other hand, you want to trigger the process only for orders that are a certain age, you can enter a date formula (e.g. 3D = 3days, 1M = 1 month). Once you have specified a formula, the process can be triggered manually (from the sales order list) or scheduled from the project queue.
- **Filter on field.** If a date formula has been specified in the previous field, this dropdown allows you to specify on *which date* in particular the formula will be applied when deciding whether to remove the remains of an order or not.
- **Removal threshold.** Regardless of when the remain is removed, the process will only remove quantities that are below the quantity, *in base unit of measure*, specified in this field.
- **Deletion filter** The removal of remain process is responsible for modifying/deleting any associated documents on the sales line, such as shipments, tracking lines, and picking activities. This dropdown list allows you to specify, however, that you do not want to remove the remains of an order that has picking activities created.

Setup by customer

Within the customer file we will have several fields that allow us to customize the process of removal by customer.



| | | | |
|----------|--|------|----------------------|
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The screenshot shows the Dynamics 365 Business Central interface for a customer card. The main content area is titled '10000 · Adatum Corporation'. Below the title, there are navigation tabs: 'New Document', 'Request Approval', 'Customer', 'Actions', 'Navigate', 'Report', and 'Less options'. The 'Customer' tab is active. The card is divided into several sections:

- Shipping**: A section with a 'Partial' status indicator.
- Statistics**: A section with a 'Manage' button.
- Special Prices & Discounts**: A table with columns: LINE TYPE, SALES TYPE, TYPE, CODE, UNIT OF MEASURE CODE, and MINIMUM QUANTITY. The table is currently empty, showing '(There is nothing to show in this view)'. There is a 'Manage' button to the right of the table header.
- Removal of Sales Order Remains**: A section with a 'Remove Sales Or...' checkbox (checked), a 'Time Threshold' input field (blank), and a 'Filter on Field' dropdown menu (blank).
- Customer Picture**: A circular profile picture of a man.
- Attachments**: A section showing 'Documents' with a count of 0.
- Sell-to Customer Sales History**: A grid of metrics:

| | | |
|------------------------|------------------------------|------------------------------|
| 0 | 0 | 2 |
| Ongoing Sales Quotes | Ongoing Sales Blanket Orders | Ongoing Sales Orders |
| 2 | 0 | 0 |
| Ongoing Sales Invoices | Ongoing Sales Return Orders | Ongoing Sales Credit Memos |
| 33 | 33 | 0 |
| Posted Sales Shipments | Posted Sales Invoices | Posted Sales Return Receipts |
| 0 | | |

The available fields are as follows:

- **Removal of Sales Order Remains.** A check that allows us to activate/deactivate remains removal. If the check is not active, by default the orders placed for this customer will not be included in the process.
- **Time threshold.** It allows us customize the remains removal calculation formula for this particular customer. If the fields are blank, the value set at the general level is used for sales and incoming payments.
- **Filter on field** Allows you to customize the fields on which the date calculation is performed to verify whether or not the remains of a sales order must be deleted. As with the previous fields, if it is blank, the value set at the general level will be used.

Note: by default, when you install the extension or create a new client, the delete removal remains checkbox will be checked, and the *Time filter* and *Calculate on field* fields will be blank.

Sales orders

In addition to per customer, the extension allows you to modify the remains management settings for each particular sales order.



| | | | |
|----------|--|------|----------------------|
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Removal of Sales Order Remains

Remove Sales Or... Filter on Field

Time Threshold

The fields are identical to those available in the customer card. The *Removal of Sales Order Remains* mark will be automatically marked or not, depending on the client settings, and *Time Filter* and *Calculate on Fields* will be blank by default, inheriting the settings from the client card (or from the sales and collections settings, if applicable).

As an additional feature, the **Date of Remains Removed** field will be filled in automatically as soon as the process of removing remains removes quantities from the document.

Usage

The Removal of Sales Order Remains process can be launched in several ways:

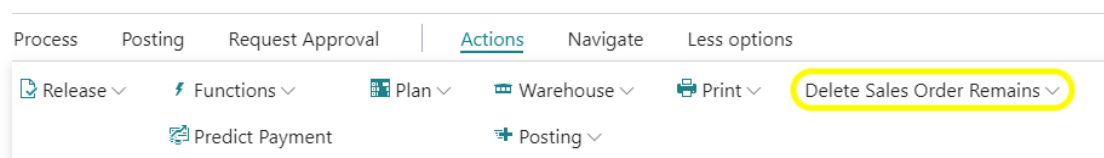
- Automatically, when the sales order is entered, if the date formula for the order (directly specified, or inherited from the customer/sales and collection configuration) is 0D.
- Manually, for an order, by pressing the button *Delete remains* from the tab *Actions* of the order to be processed.
- Manually, for all orders that meet the conditions of date and maximum quantity, by pressing the button *Delete remains* from the tab *Actions* of the list of sales orders.
- Automatically, by scheduling the task *Removal of Sales Order Remains* from the Microsoft Dynamics 365 Business Central project queue.

Automatic deletion when registering

This is the simplest case. If the order has the *Removal of Sales Order Remains* check mark active, and the date filter to be applied is 0D, the process will be launched automatically when the sales order is entered. If at that point there are any rows whose quantity (in base unit of measure) is below the set threshold, the remaining quantity is removed.

Manual removal of order remains

At any time you can press the *Delete Remains* action from the screen of a sales order.





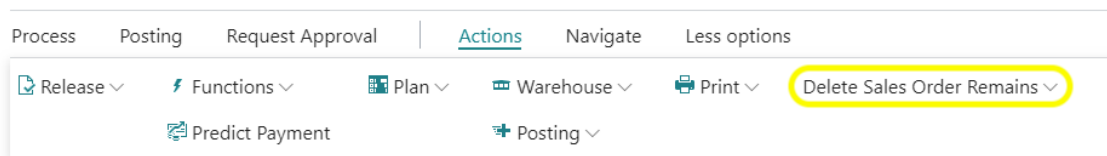
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Pressing the action will force the processing of remains un the document, regardless of whether the *Delete Remains* mark is selected or not, and the date filters set.

The action will, however, respect the settings in the fields *Deleted threshold* and *Delete Filter* of the sales and billing setup.

Manual execution of the remains removal process

On the *actions* card of the list of sales orders, we have a button that launches the processing of all sales orders that meet the criteria for the disposal of waste.



The process will run through all active orders and will remove the remains of the lines that:

- Are below the defined threshold.
- Created more than $(date\ field) + (date\ formula)$ days ago.
- Have the option to *Remove Remains* checked.
- Do not have pickings, if you have indicated this restriction in the configuration of sales and collections.

It is important to note the following restrictions:

- No action will be taken for those documents whose date formula is 0D (because the processing is at the time of registration).
- If an order has a registered pick, but the associated shipment has not been registered, no line will be deleted, as it will be considered to be working with it in the warehouse at that time.

At the end of the processing a message will be displayed indicating the total number of orders that have been modified by it.

Scheduled remains removal

After installing the extension, a new scheduled deletion task will have been created in the Microsoft Dynamics 365 Business Central *Project queue Moves*. By default, the task is created in a paused state, being necessary to configure its schedule (which days and at what times you want to start the process) and change it to a "ready" state.



| | | | |
|----------|--|------|----------------------|
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CRONUS ES | < Finance > Cash Management > Sales > Purchasing > Approvals > Self-Service > Setup & Extensions > Intelligent Cloud Ins >

Job Queue Entries: | Search | + New | Manage > | Process > | Open in Excel | Actions > | Navigate > | Less options

| STATUS | USER ID | OBJECT TYPE TO RUN | OBJECT ID TO RUN | OBJECT CAPTION TO RUN | DESCRIPTION | JOB QUEUE CATEGORY CODE | USER SESSION STARTED | EA D# |
|----------------|----------------|--------------------|------------------|--------------------------------|--------------------------------|-------------------------|----------------------|-------|
| Error | ADMINISTRADOR | Codeunit | 1951 | LP Model Management | | | 02/10/2018 15:34 | 02 |
| Ready | ADMINISTRADOR | Codeunit | 2161 | Calendar Event Execution | | | | 09 |
| <u>On Hold</u> | SYSTEM | Codeunit | 7142506 | IDPROR Removal of Remains Mgt. | Removal of Sales Order remains | | | |
| Ready | EUROPE\NAVSNAP | Codeunit | 6700 | O365 Sync. Management | | | | 09 |
| Ready | EUROPE\NAVSNAP | Codeunit | 842 | Cash Flow Forecast Update | Cash Flow Forecast Update | | | 08 |
| Ready | EUROPE\NAVSNAP | Report | 1511 | Delegate Approval Requests | | | | 09 |

The business logic of the process triggered by the project queue is exactly the same as that described in the previous point, when you trigger the process manually.