

ANAPTIS STATUSLIGHTS DOCUMENTATION

MICROSOFT DYNAMICS 365 BUSINESS CENTRALL EXTENSION

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INHALTSVERZEICHNIS

1	Introduction	2
2	Installation	2
3	First basic equipment.....	3
4	Functionality	5
5	TestTool – automated tests.....	7
6	System requirements	9

1 INTRODUCTION

anaptis StatusLights is an extension to Microsoft Dynamics 365 Business Central that extends the standard to visually represent the status of documents.

2 INSTALLATION

After downloading the application from the AppSource, you can install the extension under “Extensions”, as usual.

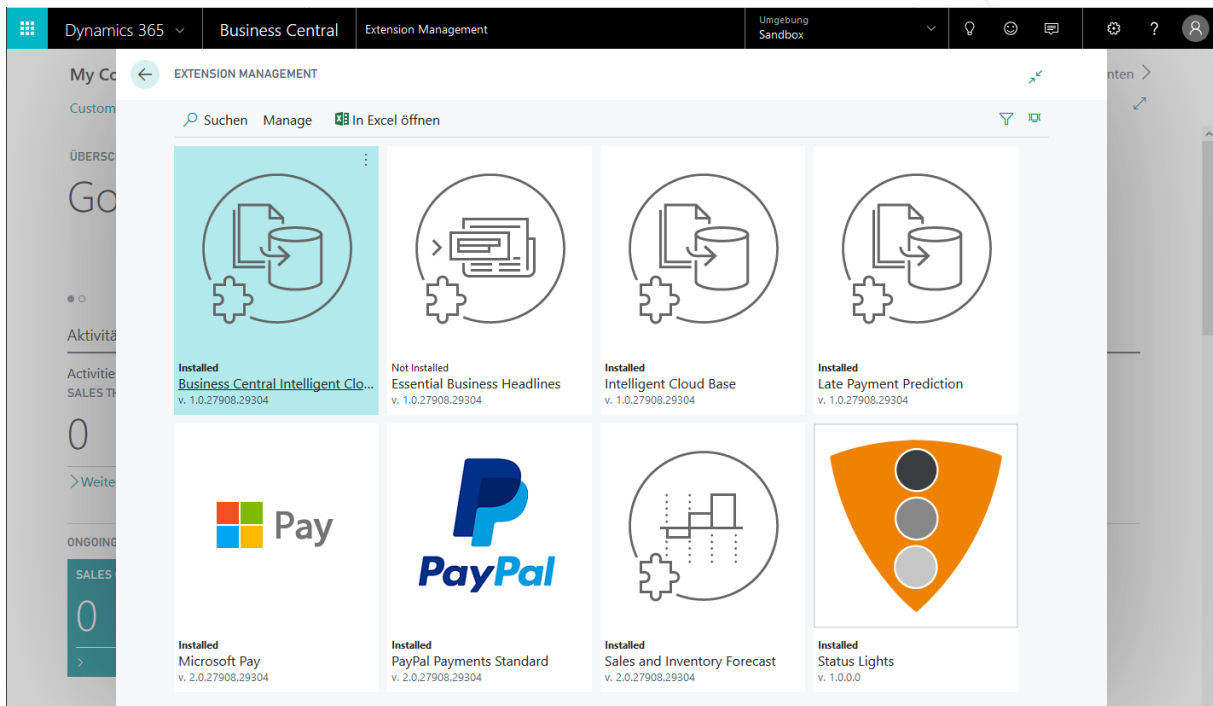


Figure 1: AppSource

If you have read and accepted the license agreement, **anaptis StatusLights** will be installed. The extension is available in English (United States) and German.

3 FIRST BASIC EQUIPMENT

Before **anaptis StatusLights** can be used, the setup must be completed successfully. You can find a setup wizard in "supported devices" in your Microsoft Dynamics 365 Business Central application.

NAME	STATUS
Geschäftsdaten migrieren	Nicht abgeschlossen
Cashflowplanung einrichten	Abgeschlossen
Genehmigungsworkflows einrichten	Nicht abgeschlossen
Debitorengenehmigungsworkflow einrichten	Nicht abgeschlossen
E-Mail einrichten	Nicht abgeschlossen
E-Mail-Protokollierung einrichten	Nicht abgeschlossen
Ihren Unternehmensposteingang in Outlook einrichten	Nicht abgeschlossen
Berichtsdaten einrichten	Nicht abgeschlossen
Artikelgenehmigungsworkflow einrichten	Nicht abgeschlossen
Zahlungsgenehmigungsworkflow einrichten	Nicht abgeschlossen
Dynamics 365 for Sales-Verbindung einrichten	Nicht abgeschlossen
MwSt. einrichten	Nicht abgeschlossen
Externen Buchhalter einladen	Nicht abgeschlossen
Konsolidierungsberichte einrichten	Nicht abgeschlossen
Set up Intelligent Cloud	Nicht abgeschlossen
Setup StatusLights	Nicht abgeschlossen

Figure 2: Setup Wizard

If you set up the extension for the first time, you can use the app for 30 days for free.

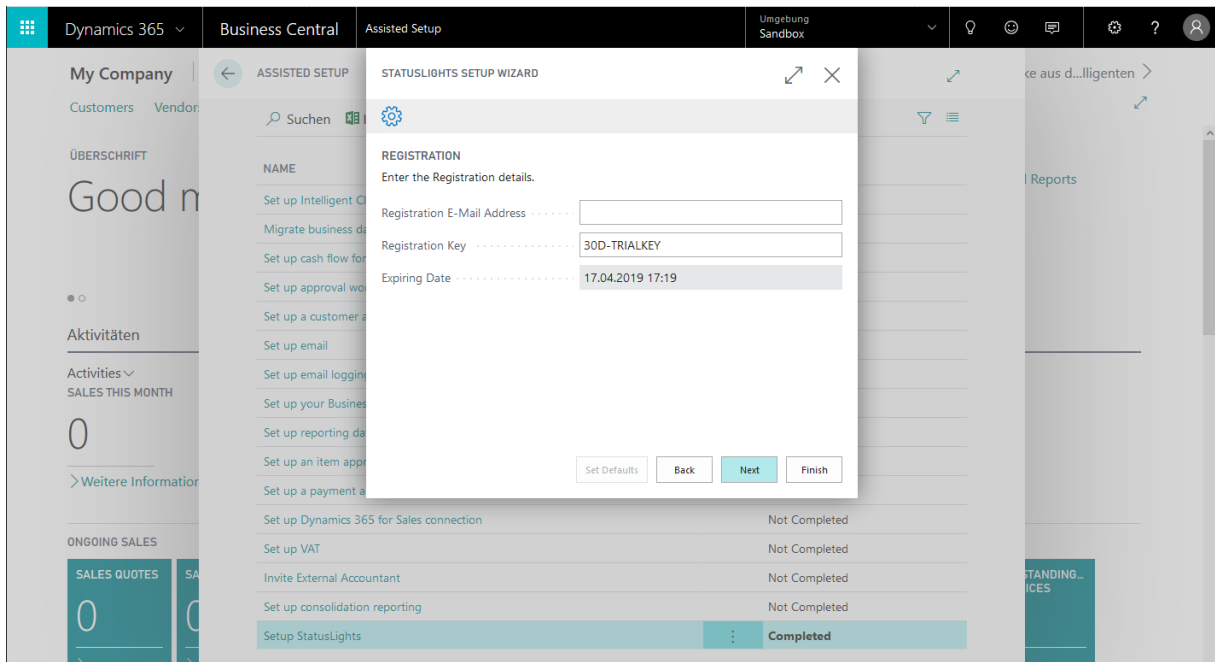


Figure 3: Registration

Then you can purchase a registration key in our [anaptisShop](#).

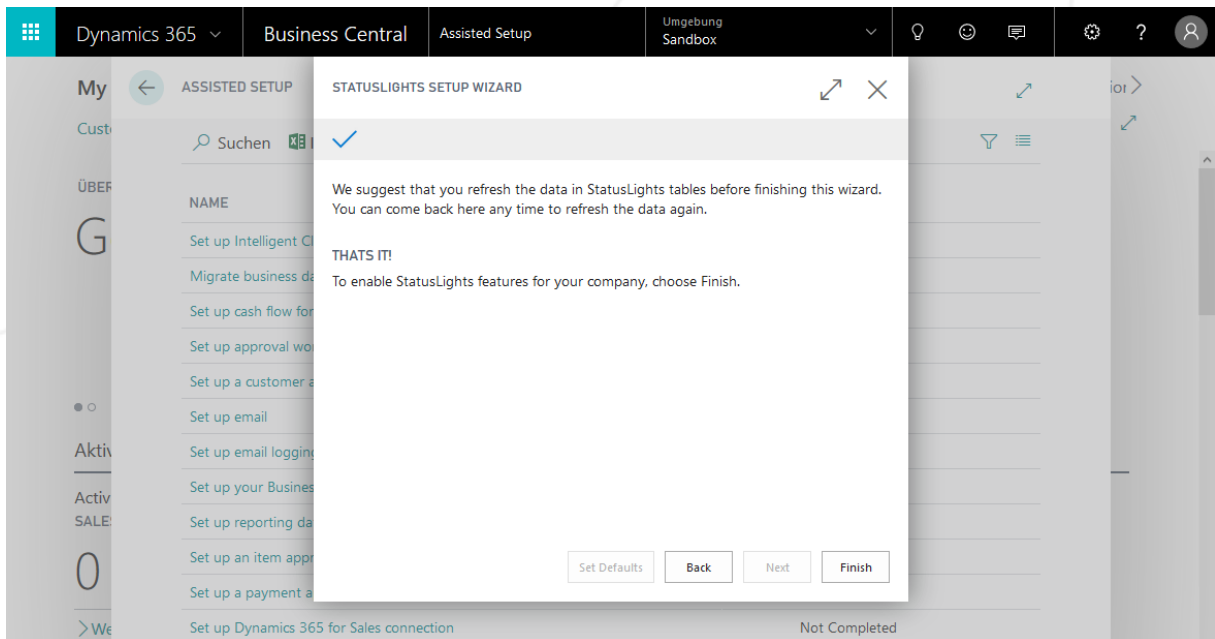


Figure 4: Registry key

Complete the setup by pressing "Finish".

4 FUNCTIONALITY

If the document status is "open", the document traffic light illuminates in red.

The screenshot shows the Dynamics 365 Business Central interface for a sales order. The breadcrumb trail is 'Dynamics 365 > Business Central > ORDER00000 - Alpine Ski House'. The page title is 'SALES ORDER' and the main header is 'ORDER00000 · Alpine Ski House'. The process bar includes 'Process', 'Release', 'Posting', 'Order', 'Request Approval', and 'Weitere Optionen'. The 'General' section shows the following data:

Customer Name	Alpine Ski House	Due Date	19.03.2019
Contact		Requested Delivery Date	
Posting Date	19.03.2019	External Document No.	
Order Date	19.03.2019		

Below the general information, there is a traffic light indicator consisting of three circles: the first is red, and the other two are grey. Below this is a table with the following data:

TYPE	NO.	DESCRIPTION	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	DISC
Item	2000-S	SYDNEY Chair	3	-	UNIT	231.00	

Figure 5: Document status "open"

If the document status is "Pending approval" or "Pending advance payment", the traffic light turns yellow.

The screenshot shows the Dynamics 365 Business Central interface for a sales order. The breadcrumb trail is 'Dynamics 365 > Business Central > ORDER000000 - School of Fine Art'. The page title is 'SALES ORDER' and the main header is 'ORDER000000 · School of Fine Art'. The process bar includes 'Process', 'Release', 'Posting', 'Order', 'Request Approval', and 'Weitere Optionen'. The 'General' section shows the following data:

Customer Name	School of Fine Art	Due Date	19.03.2019
Contact		Requested Delivery Date	
Posting Date	19.03.2019	External Document No.	
Order Date	19.03.2019		

Below the general information, there is a traffic light indicator consisting of three circles: the middle one is yellow, and the other two are grey. Below this is a table with the following data:

TYPE	NO.	DESCRIPTION	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	DISC
Item	2000-S	SYDNEY Chair	3	-		234.00	

At the bottom of the page, there is a summary section:

Subtotal Excl. VAT	702.00	Total Excl. VAT	702.00
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Figure 6: Document status „Pending approval“ or „Pending advance payment“

Finally, the document status "released" is displayed in green.

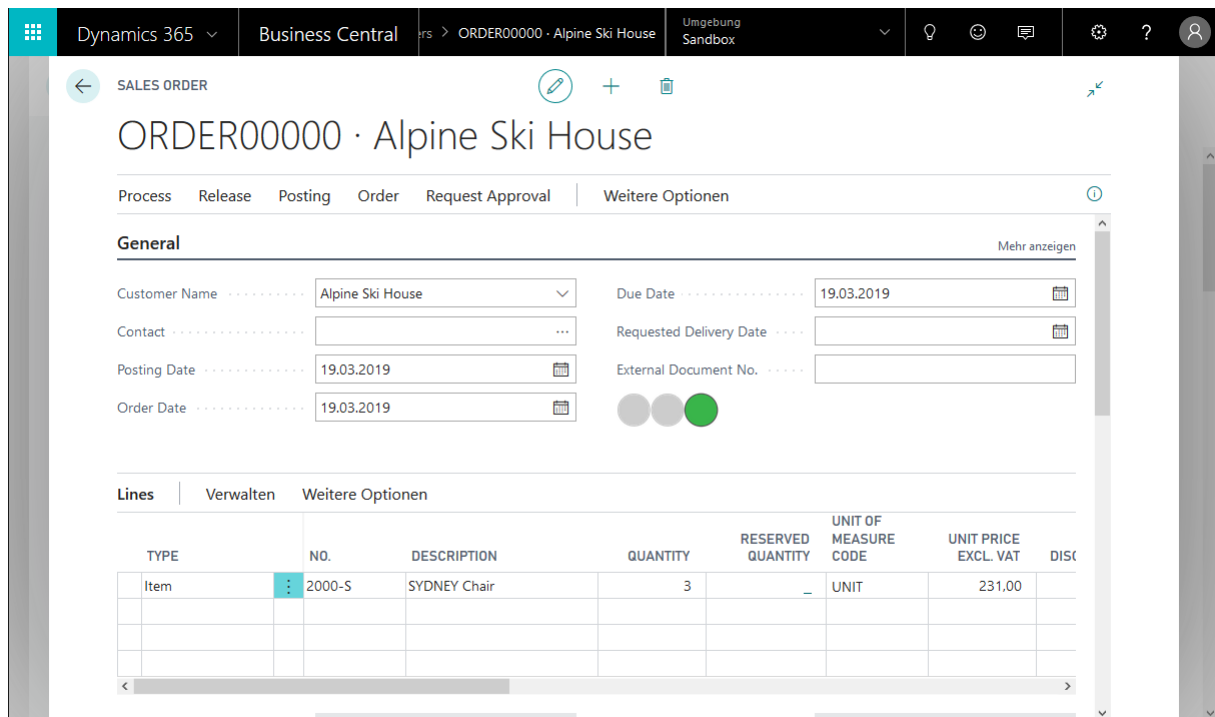


Figure 7: Document status "released"

4.1 SUPPORTED SUPPLEMENTS

The **anaptis StatusLights** enhancement supports the following document types from purchasing:

- Quote
- Order
- Invoice
- Credit Memo
- Blanket order
- Return Order

In addition, the following document types from the Sales area are supported:

- Quote
- Order
- Invoice
- Credit Memo
- Blanket Order
- Return Order

5 TESTTOOL – AUTOMATED TESTS

To ensure the functionality of the app, we offer a test tool. You can install the test tool separately from the app. However, it requires the Microsoft Dynamics 365 Business Central Test Tool Framework.

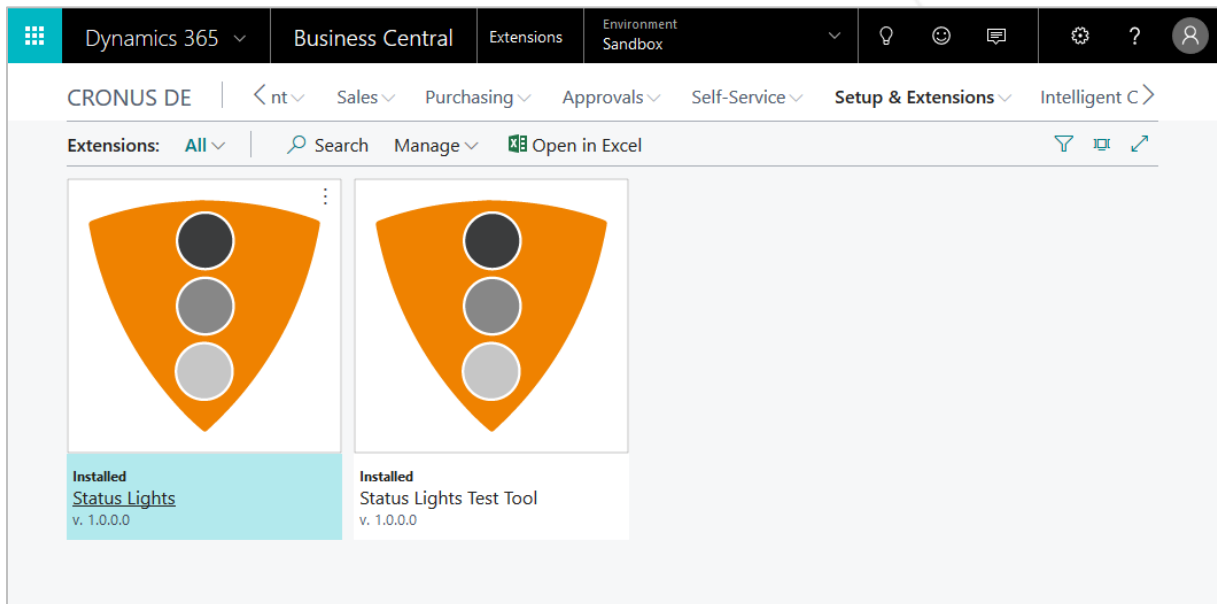


Figure 8: Test Tool

The Test Tool allows you to check all functionality using the Microsoft Dynamics 365 test tool:

1. step

Start the standard test tool.

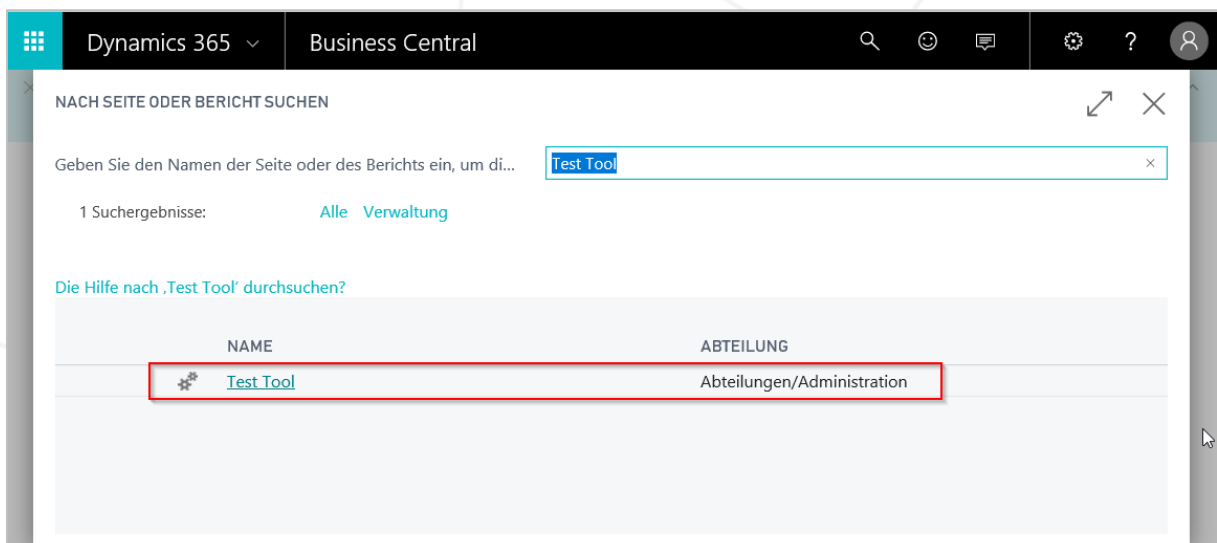


Figure 9: Starting the test tool

2. step

Add the tests.

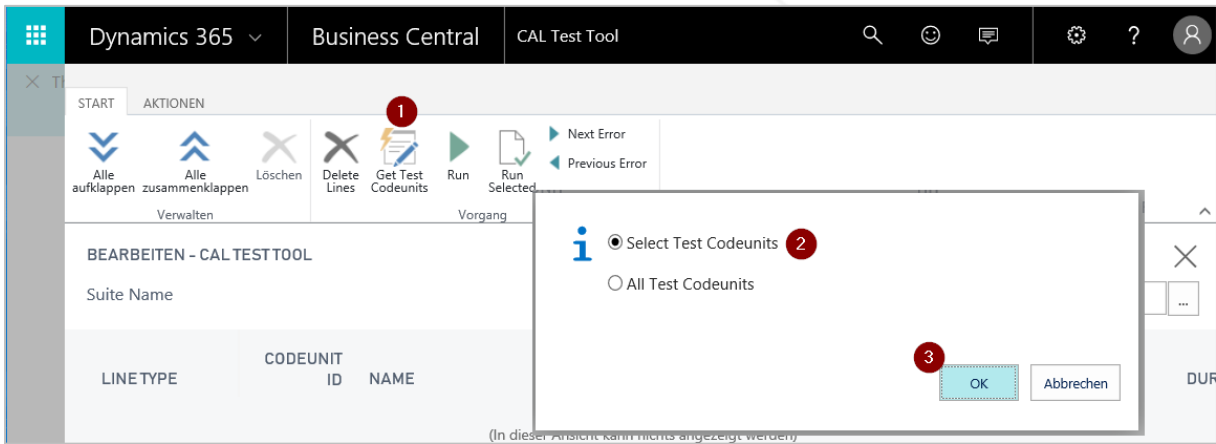


Abbildung 10: Adding tests

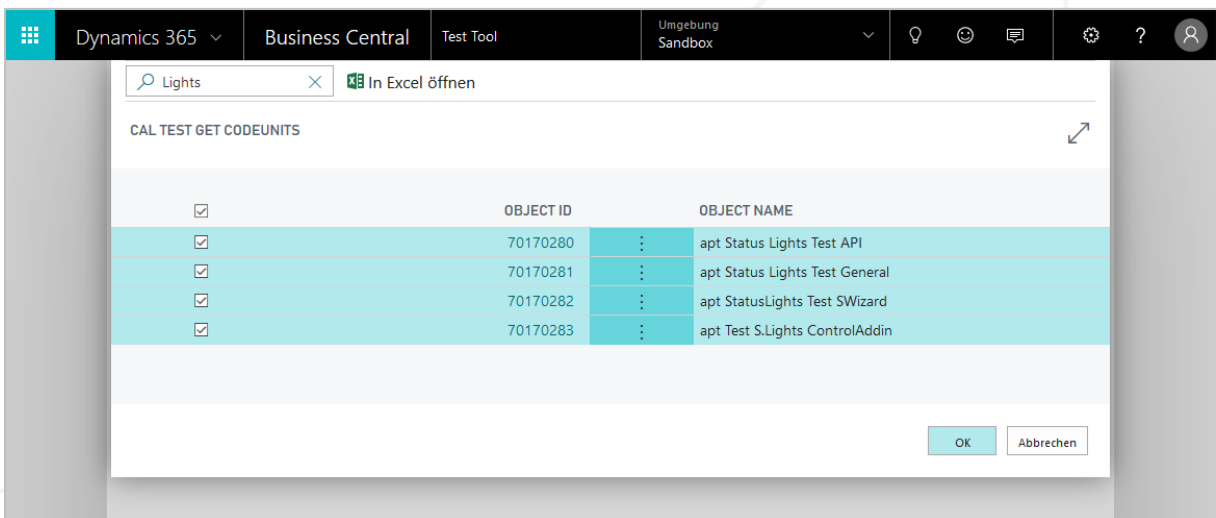


Figure 11: Choosing tests

3. step

Run the tests.

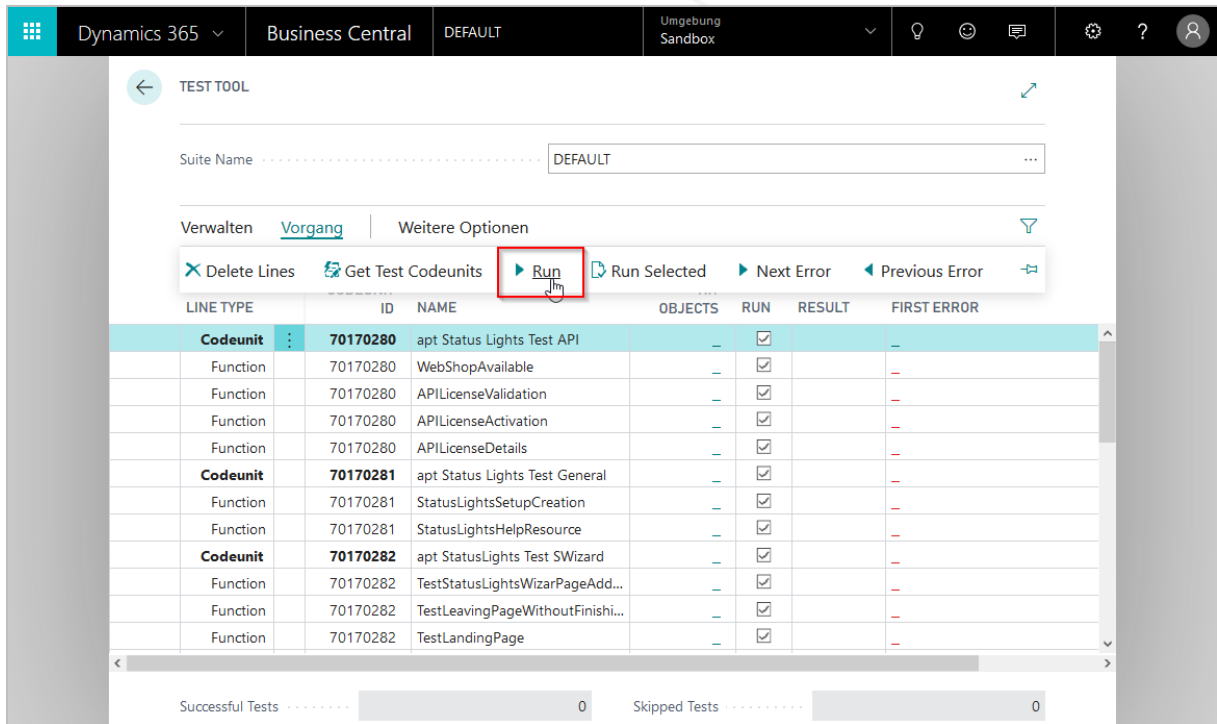


Figure 12: Running tests

6 SYSTEM REQUIREMENTS

Supported version of Microsoft Dynamics 365 Business Central

- 12.3.23590-W1,-DE
- 12.3.23590-W1,-DE
- 13.0.24630-W1,-DE
- 13.3.27437-W1-DE