

Additional Items and Cross-Selling App for Microsoft Dynamics 365 Business Central

User Scenario Documentation

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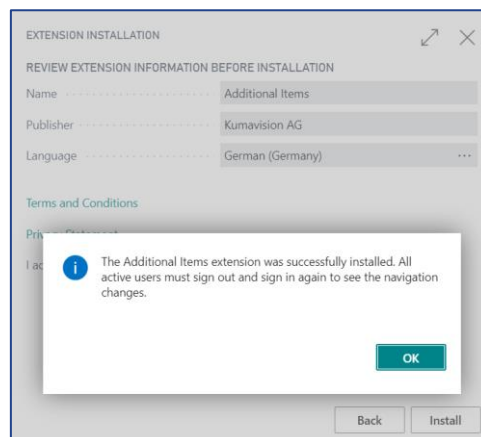
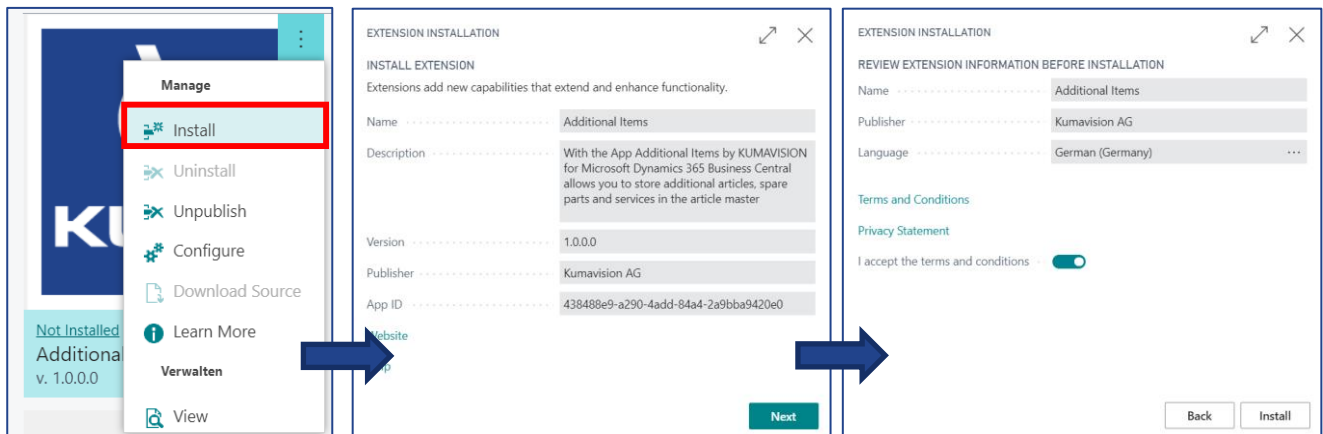
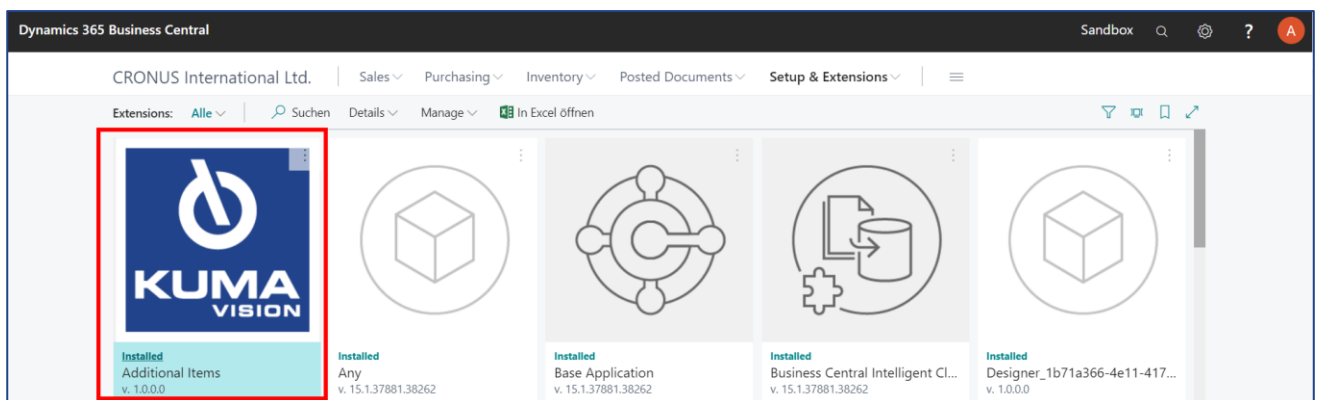
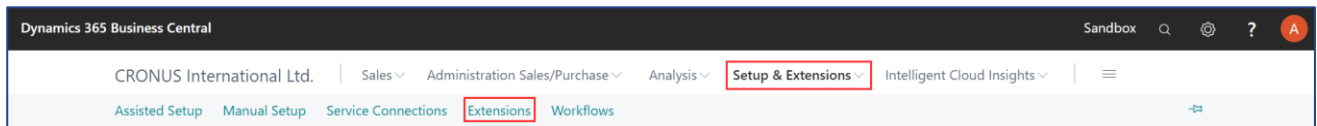
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1 Setup

1.1 Open Extensions Page

Open the extensions page via „Setup & Extensions“ → „Extensions“ or use the “Tell-Me-functionality” to do this.

1.2 Installation of the Extension „Additional Items“ app

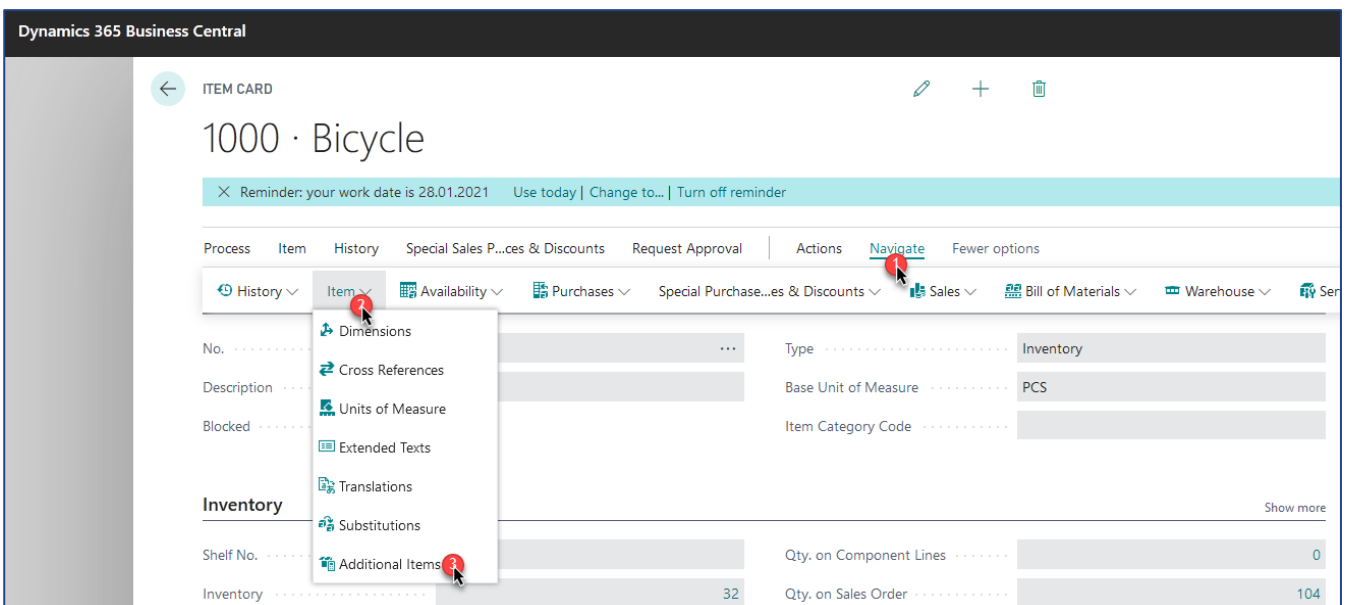


2 General information on the “Additional Items” app

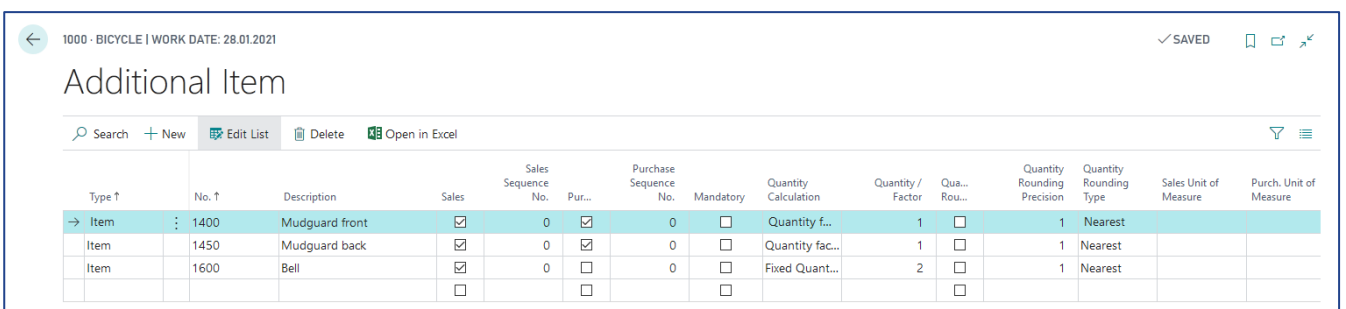
The “Additional Items” app from KUMAVISION based on Microsoft Dynamics 365 Business Central supports you in the administration of mandatory extra articles and services and the cross-selling of optional articles and services. The configuration is done via the item card of the base item. If desired, this configuration can also be carried out per variant. If the base item is inserted in a document (e. g. sales quote or purchase order), the system displays an overview card with the configured extras. Depending on the configuration, these can still be adapted and then transferred to the document.

3 Example

- Use the search function to open the list of items
- Double-click on the entry of the base item for which you want to configure additional items or services
- Open the configuration page:



- In this view you can now preconfigure the desired additional items or services



Type ↑	No. ↑	Description	Sales	Sales Sequence No.	Pur...	Purchase Sequence No.	Mandatory	Quantity Calculation	Quantity / Factor	Qua... Rou...	Quantity Rounding Precision	Quantity Rounding Type	Sales Unit of Measure	Purch. Unit of Measure
→ Item	1400	Mudguard front	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	Quantity f...	1	<input type="checkbox"/>	1	Nearest		
Item	1450	Mudguard back	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	Quantity fac...	1	<input type="checkbox"/>	1	Nearest		
Item	1600	Bell	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	0	<input type="checkbox"/>	Fixed Quant...	2	<input type="checkbox"/>	1	Nearest		
			<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>			<input type="checkbox"/>				

4 Field description

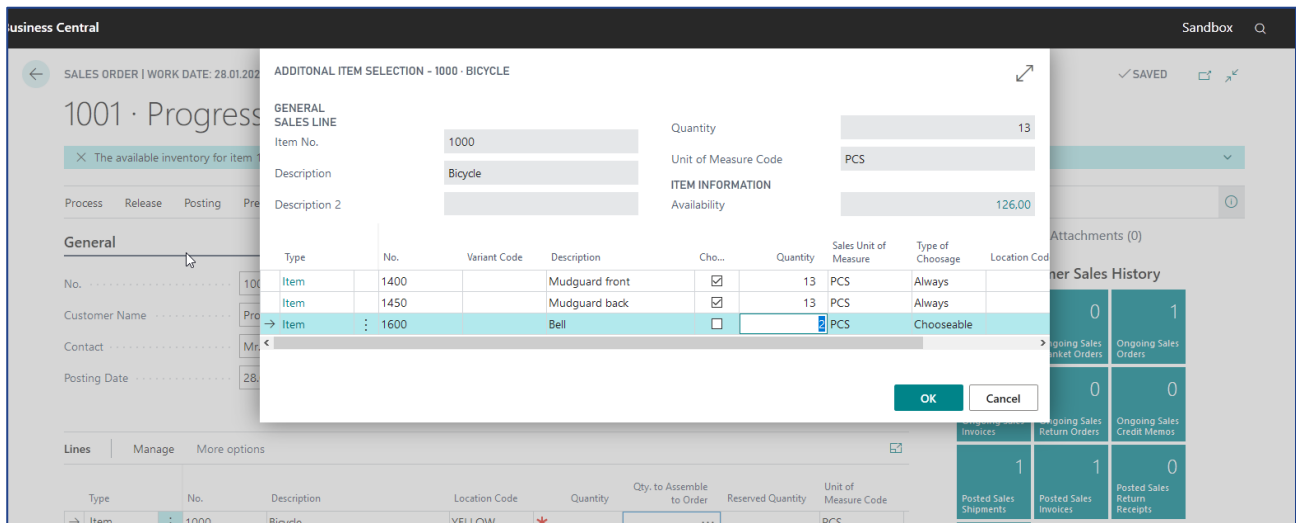
Field	Description
Type	The type can be used to specify the type of the additional line . Possible values are: "G/L Account", Item, Resource, "Fixed Asset", "Charge (Item)"
No.	Depending on the Type field, the number of the corresponding line can be selected here (item number, resource number, ...)
Variant Code	Represents the variant of the corresponding line , depending on the fields type and number.
Description	The description field is automatically filled in after selection of a No. The description in this table is not editable and is not included as description text in documents . Rather it serves here for the illustration and clarification of the selected associated line.
Sales	This field can be used to specify that the corresponding line is to be used in sales documents . If a line is only used on the purchasing side, this field must be deactivated. In the later display of the overview card within document entry, the lines are filtered accordingly .
Purchase	This field can be used to specify that the corresponding line is to be used in purchasing . If a line is only to be used for the purchase side, then this field is to be deactivated. In the later display of the overview card within document entry, the lines are filtered accordingly .
Mandatory	The field "mandatory" determines whether a row can be optionally copied into the document or is to be regarded as a mandatory line . In this case "mandatory" means that the user can't deselect the corresponding rows within the overview card during document entry. If " mandatory " is not set, on the other hand, it indicates that those additional lines can optionally be displayed to the user for selection.
Quantity Calculation	The quantities of additional lines can either be fixed or calculated quantities regarding the main document line . The "Quantity Calculation" field can therefore be used to define whether the quantity is to be used as a factor for the main quantity or as a fixed quantity.
Quantity / Factor	Depending on the "Quantity Calculation" field, you can use this field to define either a factor related to the quantity in the main line (for quantity calculation = "quantity factor") or a fixed quantity ("constant quantity").
Quantity Rounding	This switch can be used to specify whether a quantity rounding is to take place . Especially regarding a calculation about a quantity factor and the possibility to store a factor with decimal places, a rounding can become necessary . Further rounding settings can be made using the fields "Quantity rounding Accuracy" and "Quantity rounding type".
Quantity Rounding Precision	If a value is entered here, the application rounds the quantity of the corresponding line accordingly . Quantity rounding is useful if the quantity is calculated using a quantity factor and the factor is an odd value. A value of "0.01", for example, corresponds to rounding the quantities of the additional line to 2 decimal places.

<p>Quantity rounding type</p>	<p>If the quantities of the row are to be rounded, the following can be entered in this field to define how the rounding is to take place. Possible values are: up, down, nearest</p>
<p>Automatically created</p>	<p>This field is used to indicate whether the corresponding line entry was created manually by the user or automatically by the “Cross-Ref Generator” (see further description).</p> <p>If the “Cross-Ref Generator” for creating the cross-references is called, all cross-references with the identifier “Automatically created”=Yes will be deleted first and then the cross-references will be created again.</p> <p>All cross-references with the identifier “Automatically created”=No will not be deleted and will persist. This field is editable and therefore it can be controlled by setting / or removing the check mark in this field whether the respective entry is deleted from the fill run and possibly recreated or is always retained.</p>

- We can now use the configured base item to test our configuration. To do this we need to create a new sales/purchase document.

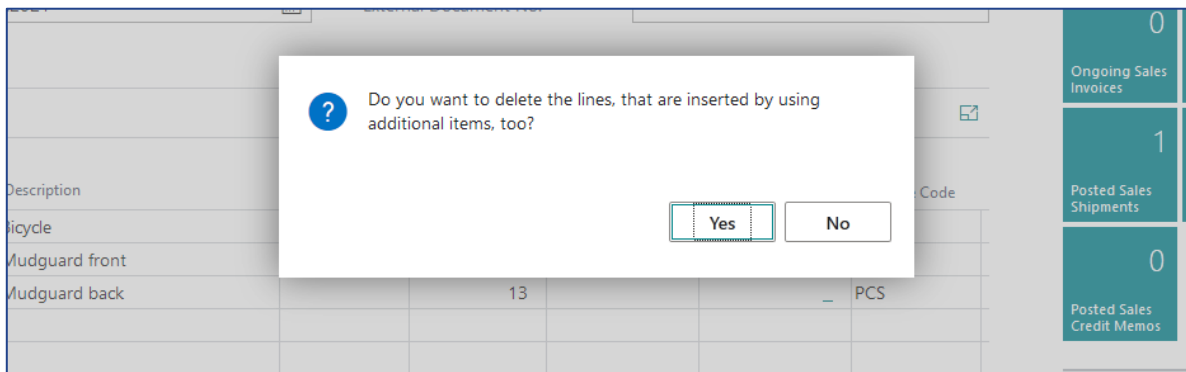
In this example we will use a sales order:

- After filling in the necessary header fields we can create a line for our base item. After validating the desired quantity, the overview card with our configured additional items should pop up.

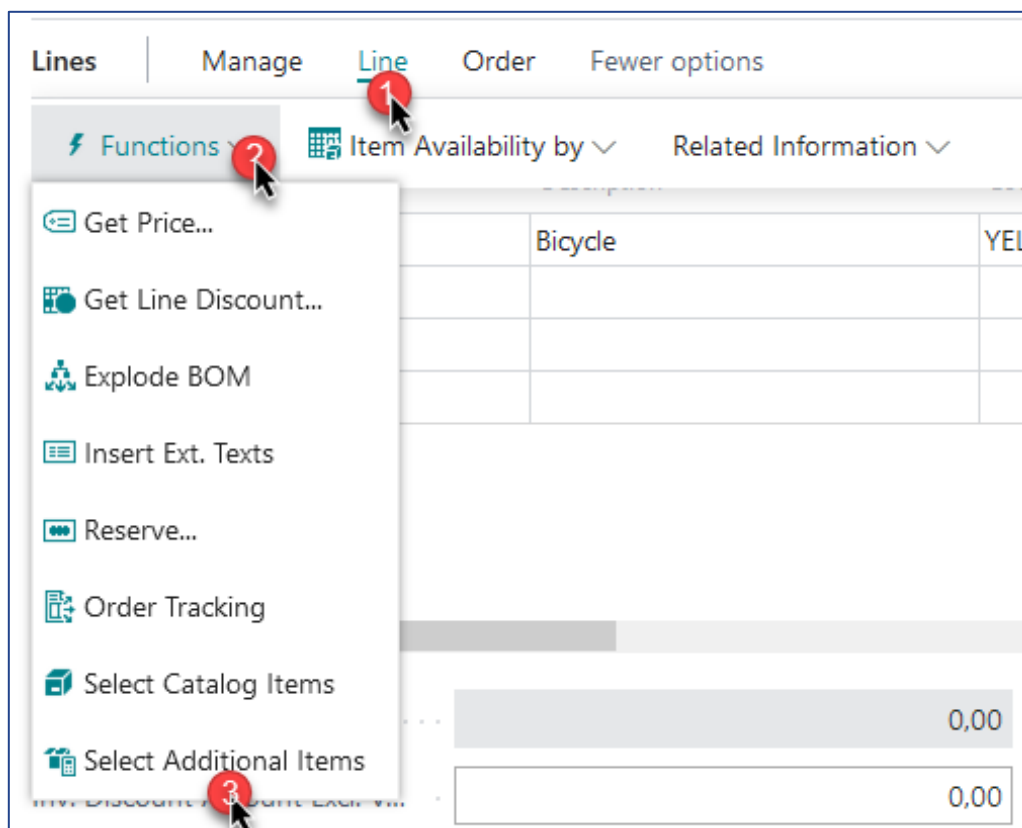


Note: When changing the quantity of the base line, the overview card will pop up again to update the connected lines.

- If you decide to remove the base item from the document, you will be asked whether the connected lines should be deleted as well:



- Additional items can also be retrieved retroactively by calling the overview card on the base item document line from the menu:



5 Automatic creation of cross-references

With this function, the assignment of the corresponding items to an item takes place automatically when you execute the report generate item cross-references.

GENERATE ITEM CROSS REFERENCE ↗

Options

From Date: 07.05.2019 📅

To Date: 07.11.2019 📅

Filter: Item

X No. ▼

+ Filter...

Filter totals by:

+ Filter...

Schedule...
OK
Cancel

This generator deletes all cross-reference entries with "Automatically created = yes" and recreates them as follows: The sales history is analyzed to determine the number of joint sales of items. If the number of hits exceeds a configurable value in the sales setup, an entry is created in the "Additional Item" table. The number of created entries can be limited by a further setup value.

←
✎ + 🗑
✓ SAVED
🔖 📄 ↗

Additional Items

Actions

Additional Items

Max. Number of Cros... Min. Number of Cross...

6 Uninstall App

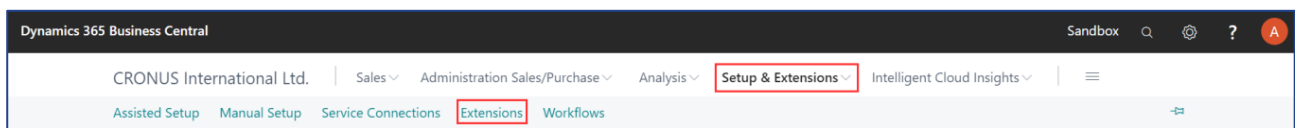
The following steps describe how to uninstall and unpublish the app.

The following steps describe how to uninstall the app.

6.1 Uninstall

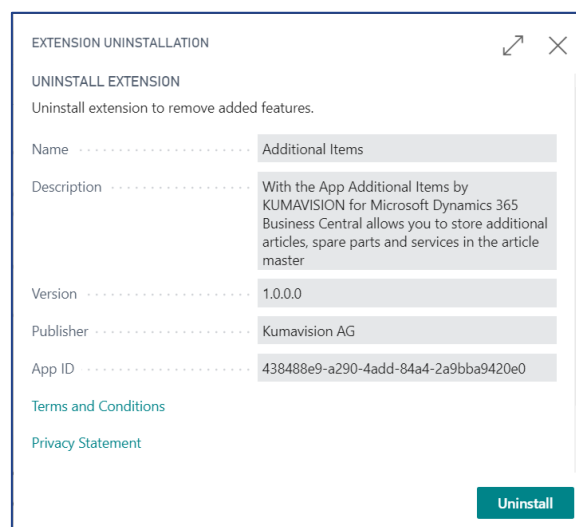
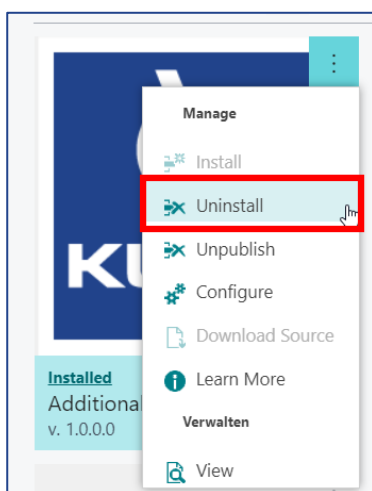
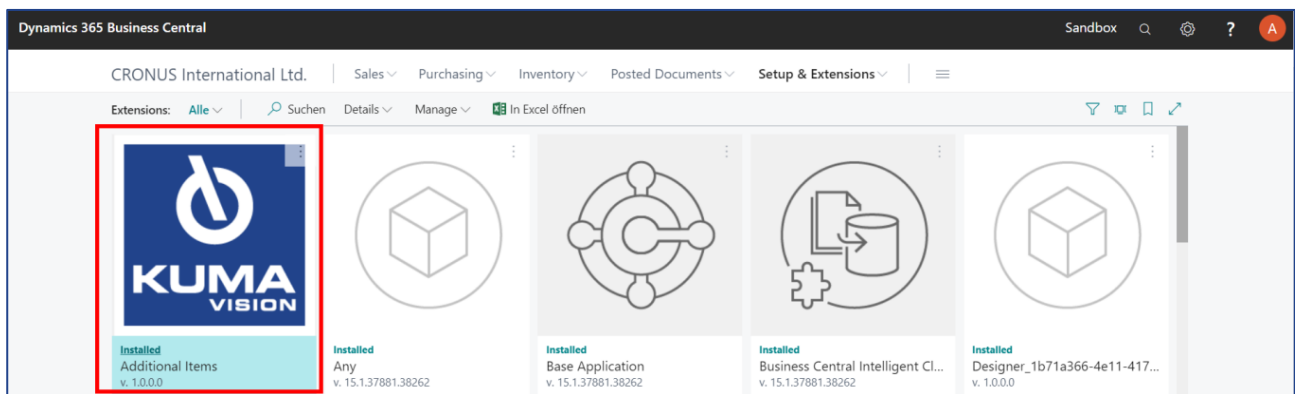
6.1.1 Open extensions page

Open the extensions page via „Setup & Extensions“ → „Extensions“ or use the “Tell-Me-functionality” to do this.



6.1.2 Uninstall the Extension „Additional Items“

Select the extension by clicking on it.



Confirm the Uninstall

To uninstall the extension, click the „Uninstall“ button.

