

# anaptis Configuration

Microsoft Dynamics 365 Business Central Extension

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# 1 Assisted Setup

To get to the supported setup, click on the user menu and then on *Assisted Setup*.

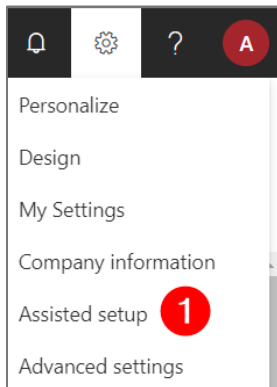


Illustration 1: Assisted setup via user menu

Then click on *Setup anaptis Configuration* to start the setup. As a result, a setup window will open. You can automatically assign the right to use the anaptis Configuration to all users by clicking on *Set defaults*.

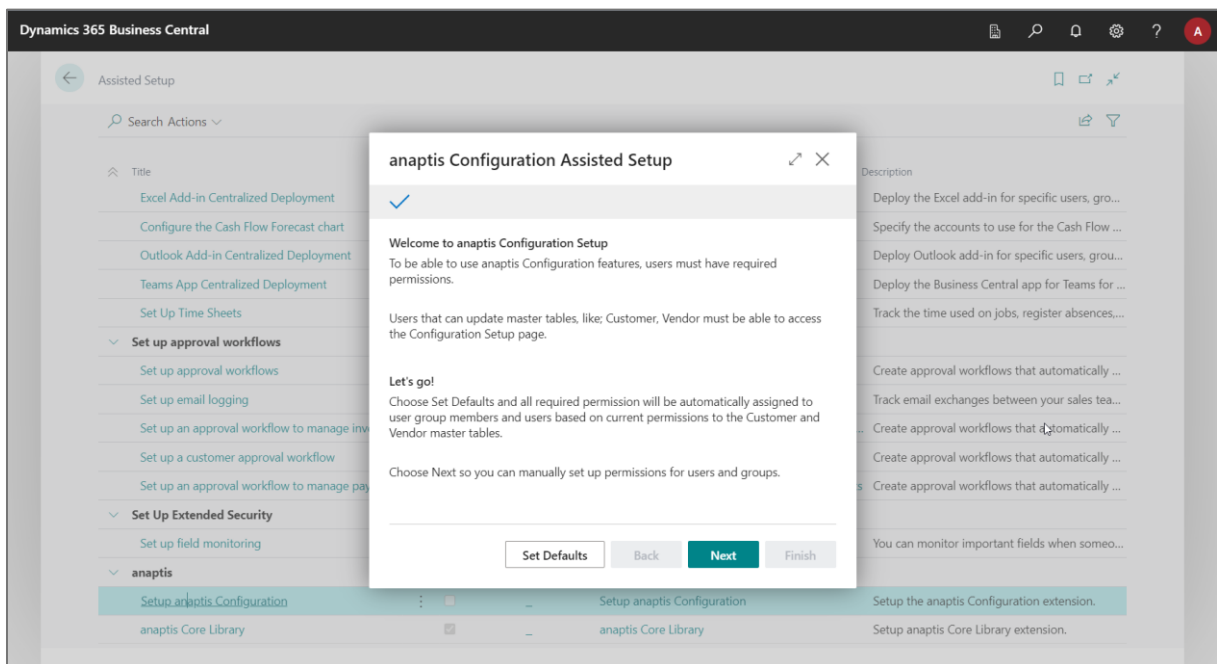


Illustration 2: Assisted setup for anaptis configuration

Click on *Next* if you do not want to set the default values. Assign the appropriate access level (read or modify) to the user groups that need to use the anaptis Configuration.

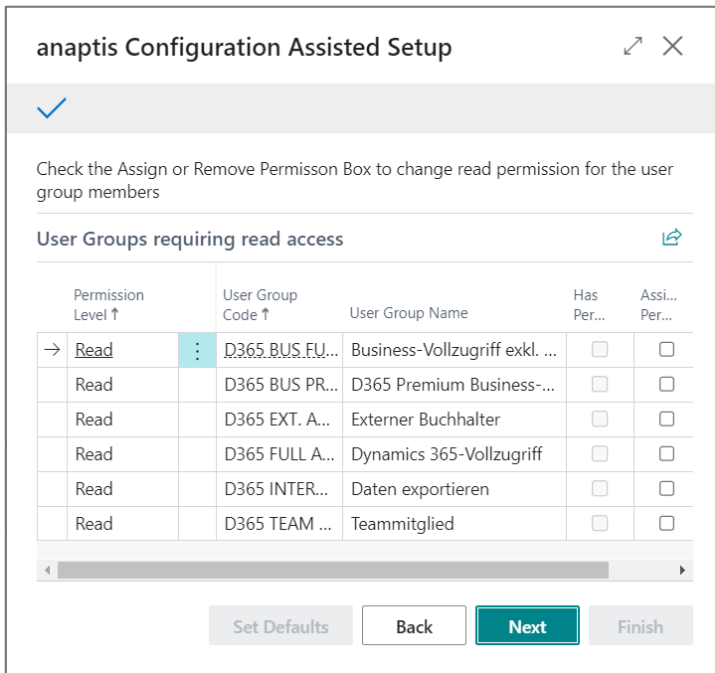


Illustration 3: Setup of a read access for user groups

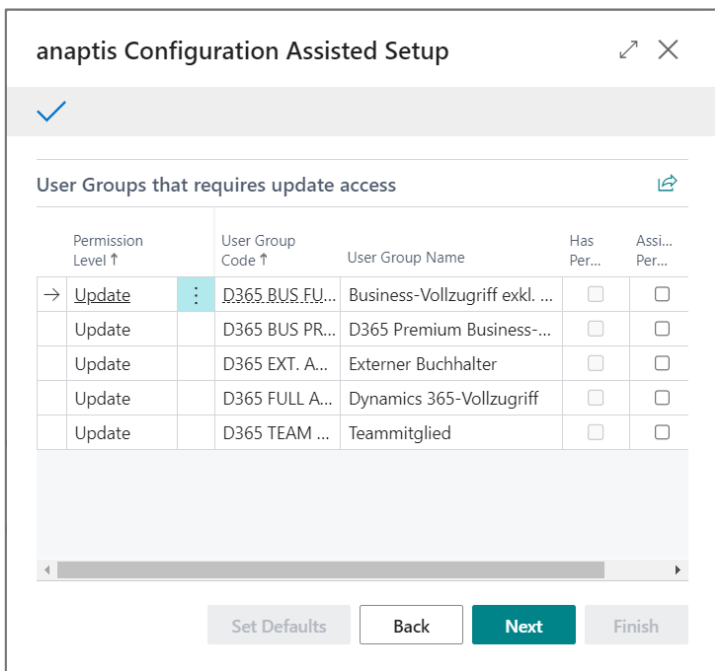


Illustration 4: Setup of update access or writing access for user groups

The two settings above could also be defined individually for all existing users. However, this is only necessary if the user does not already belong to one of the previously set up user groups.

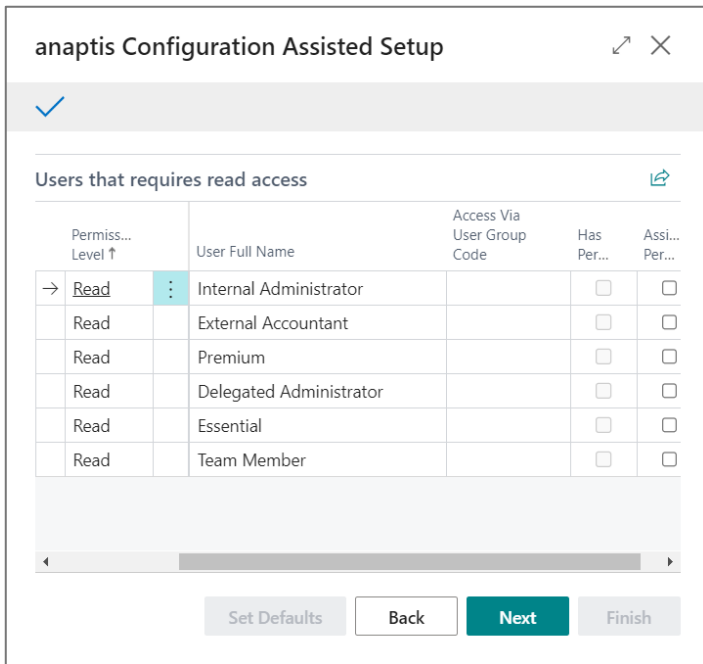


Illustration 5: Setup of a read access for users

At the end, you enter the registration key, the associated e-mail address, and the basic setup of the anaptis Configuration App (e.g., stored number series). If the automatic setup has been conducted, only the email address needs to be entered.

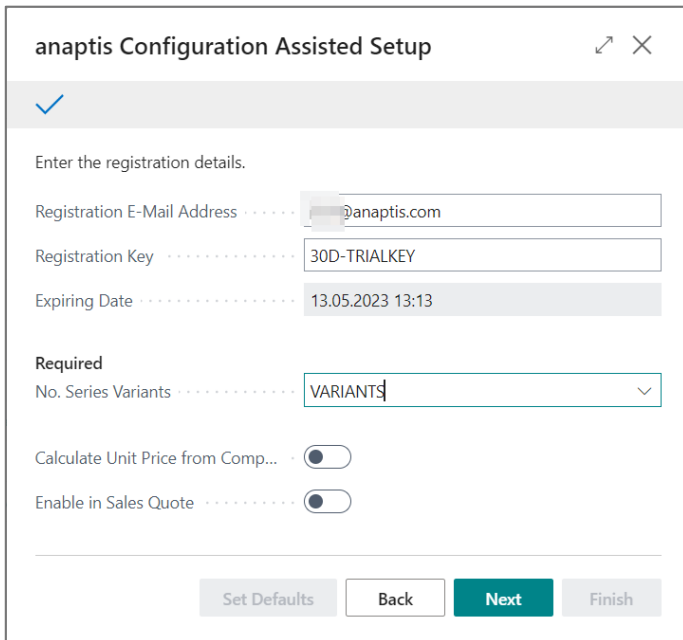


Illustration 6: Basic setup of the app

The other settings are optional. A description of this can be found in the tooltips (tip that appears when your mouse pointer is moved over the title of the field).

The next page will confirm the installation. Finally, click on the *Finish* button.

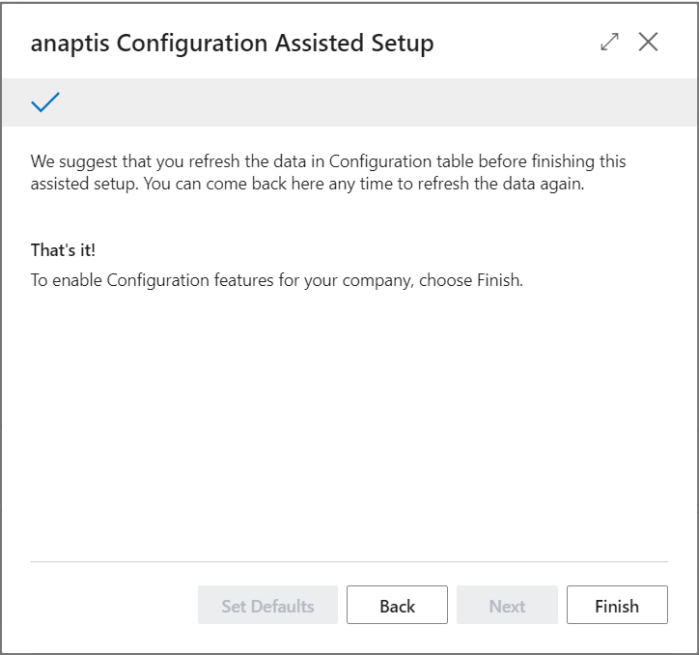


Illustration 7: Confirming the installation

## 2 Manual Setup

To get to the manual setup, you can access the manual setup via the setup (the gear in the top right corner). To do this, select *Advanced Settings* in the user menu.

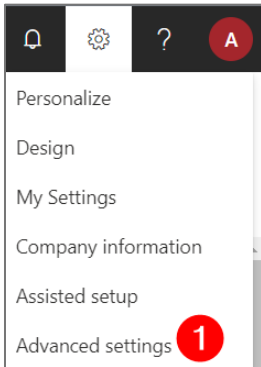


Illustration 8: Accessing manual setup via user menu

Therefore, a new window will open. The manual setup can be started at the top right.

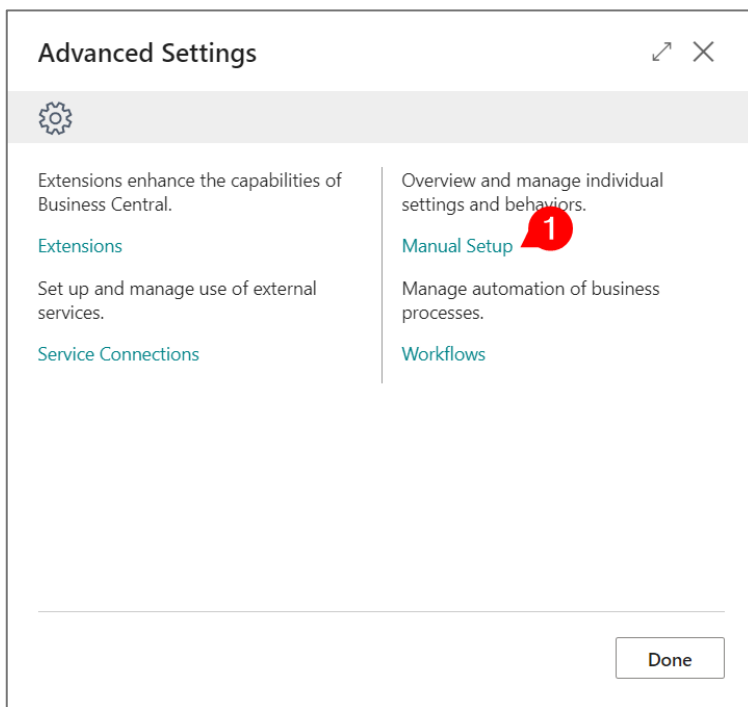


Illustration 9: Start the manual setup

A list of all manual settings opens. Then click on anaptis *Configuration setup*.

Short Title	Extension Name	Description	Category	Keywords	Expected Duration
Fixed assets setup	Base Application	Set up accounting policies for fixed a...	Fixed Assets	Anlagen	10
Transfer routes	Base Application	View or change transfer routes that a...	Inventory	Lagerbestand, Lagerort, Umlagerung	5
Set up warehouse management	Base Application	Set up number series for warehouse ...	Inventory	Lagerbestand, Lagerort, Nummernse...	10
Item charges	Base Application	Set up item charge numbers and the...	Inventory	Lagerbestand, Artikel Zu-/Abschläge	10
Intercompany dimensions	Base Application	Specify how you want to map the cu...	Intercompany	Intercompany, Dimensionen	3
Intercompany chart of accounts	Base Application	Specify how you want to map the cu...	Intercompany	Intercompany, Posten, Finanzen	10
Intercompany partners	Base Application	View or edit the codes for partners t...	Intercompany	Intercompany, Partner	5
Intercompany setup	Base Application	Set up how you want to electronica...	Intercompany	Intercompany	2
anaptis Configuration	anaptis Configuration	The anaptis Configuration Setup. Her...	anaptis	anaptis, Configuration, Sales, Assem...	0
anaptis Core Library	anaptis Core Library	Setup anaptis Core Library	anaptis	anaptis, Library, Framework	0
VAT report setup	Base Application	Before you can create and submit VA...	Finance	MwSt, Bericht	3
VAT report setup	Base Application	Before you can create and submit VA...	Finance	MwSt-Bericht, Vorschlägen, Überprü...	3
VAT report setup	Base Application	Before you can create and submit VA...	Finance	VAT Report, Suggest, Validate, Submi...	3
VAT report setup	Base Application	Before you can create and submit VA...	Finance	VAT, Report	3
VAT report setup	Base Application	Before you can create and submit VA...	Finance	VAT Report, Suggest, Validate, Submi...	3
VAT report setup	Base Application	Before you can create and submit VA...	Finance	VAT, Report	3

Illustration 10: Selection of the manual setup for anaptis Configuration

In the following, the same settings as in the assisted setup can be made.

**anaptis Configuration Setup**

Related ▼ Automate ▼

---

**Registration**

Registration E-Mail A...       **Registration Key**

Registration Key .....

Expiring Date .....

---

**General**

Calculate Unit Price fr...

App User Experience .....  ▼

Enable in Sales Quote ..

**Variants**

Variant Creation No. S...  ▼

Illustration 11: Manual setup of anaptis Configuration

For information on the fields, call up the tooltips (tips that appear when the mouse pointer is moved over the title of the field). The tooltip describes what the specific field is needed for.



### 3 Creation of a default item variant

To use the anaptis Configuration for an item, a standard variant from the assembly parts list must be created for this item. Navigate to the item card by clicking on *Sale* and then click on *Item*.

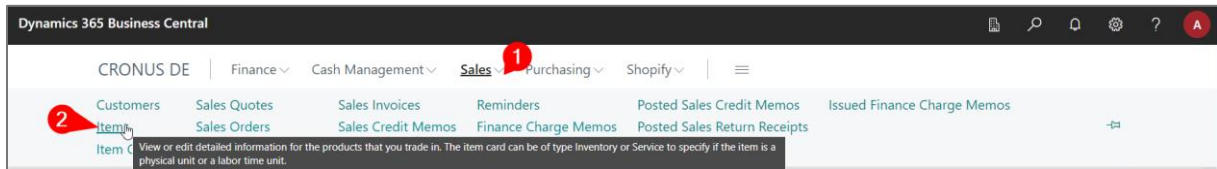


Illustration 12: Opening an item card

In the item list that appears, open an item that contains a parts list. In this example it is item no. *1925-W Conference Package 1 to 6*.

A screenshot of the Dynamics 365 Business Central item list. The table displays various items with columns for No., Description, Type, Inventory, Subst... Exist, Assem... BOM, Base Unit of Measure, Cost is Adj., Unit Cost, Unit Price, Vendor No., and Default Deferral Template. The item '1925-W : 1925-W Conference Package 1...' is highlighted in blue. The table data is as follows:

No. ↑	Description	Type	Inventory	Subst... Exist	Assem... BOM	Base Unit of Measure	Cost is Adj.	Unit Cost	Unit Price	Vendor No.	Default Deferral Template
1908-S	LONDON Schreibtischstuhl, blau	Inventory	3	No	No	STÜCK	☑	148,90	191,00	30000	
1920-S	ANTWERP Konferenztisch	Inventory	10	No	No	STÜCK	☑	508,00	651,10	20000	
1925-W	1925-W Conference Package 1...	Inventory	0	No	Yes	STÜCK	☑	0,00	189,80		
1928-S	AMSTERDAM Lampe	Inventory	8	No	No	STÜCK	☑	43,10	55,20	10000	
1929-W	Konferenzpaket 1 bis 8	Inventory	0	No	Yes	STÜCK	☑	0,00	235,00		
1936-S	BERLIN Gästestuhl, gelb	Inventory	100	No	No	STÜCK	☑	151,10	193,70	20000	
1953-W	Gastabschnitt 1	Inventory	-49	No	Yes	STÜCK	☑	0,00	126,40		
1960-S	ROME Gästestuhl, grün	Inventory	2	No	No	STÜCK	☑	151,10	193,70	20000	
1964-S	TOKYO Gästestuhl, blau	Inventory	4	No	No	STÜCK	☑	151,10	193,70	20000	
1965-W	Konferenzpaket 2 bis 8	Inventory	-81	No	Yes	STÜCK	☑	0,00	235,00		
1968-S	MEXICO Bürostuhl, schwarz	Inventory	10	Yes	No	STÜCK	☑	148,90	191,00	30000	
1969-W	Konferenzpaket 1	Inventory	-7	No	Yes	STÜCK	☑	0,00	343,50		
1972-S	MUNICH Schreibtischstuhl, gelb	Inventory	0	No	No	STÜCK	☑	148,90	191,00	30000	
1980-S	MOSCOW Schreibtischstuhl, rot	Inventory	0	Yes	No	STÜCK	☑	148,90	191,00	30000	
1988-S	SEOUL Gästestuhl, rot	Inventory	0	Yes	No	STÜCK	☑	151,10	193,70	20000	

Illustration 13: Opening an item from the item list

By clicking on the item number, the item card opens.

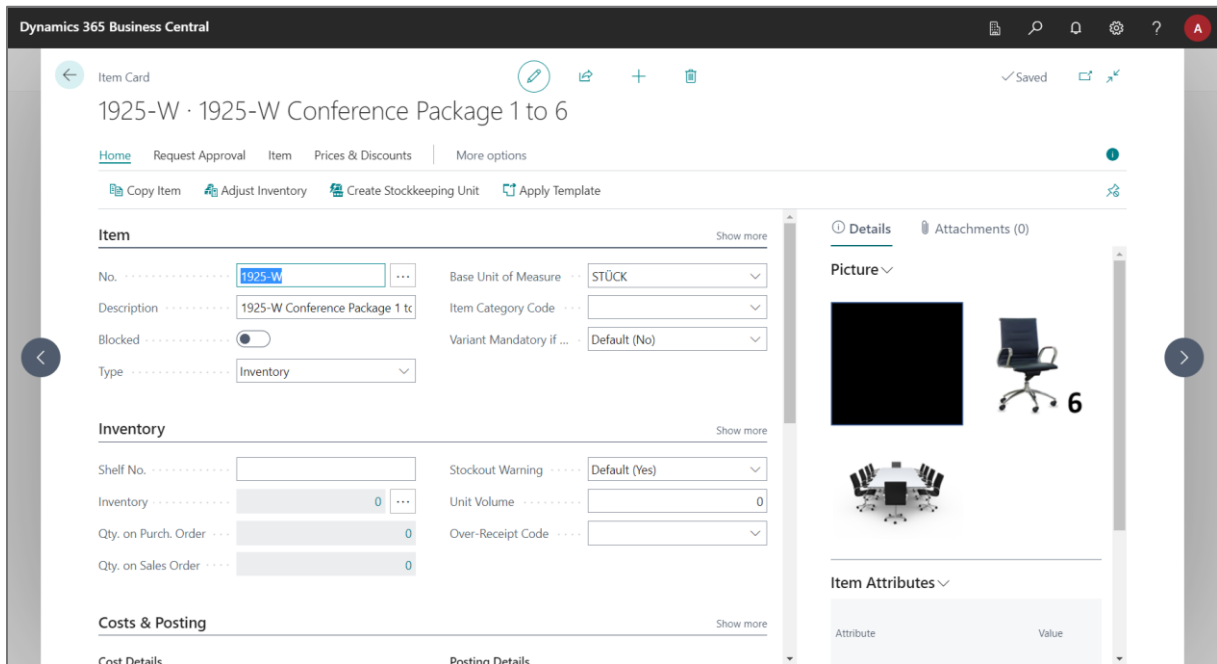


Illustration 14: Item card

This item has an assembly BOM (Bill of Material) – but currently no variants.

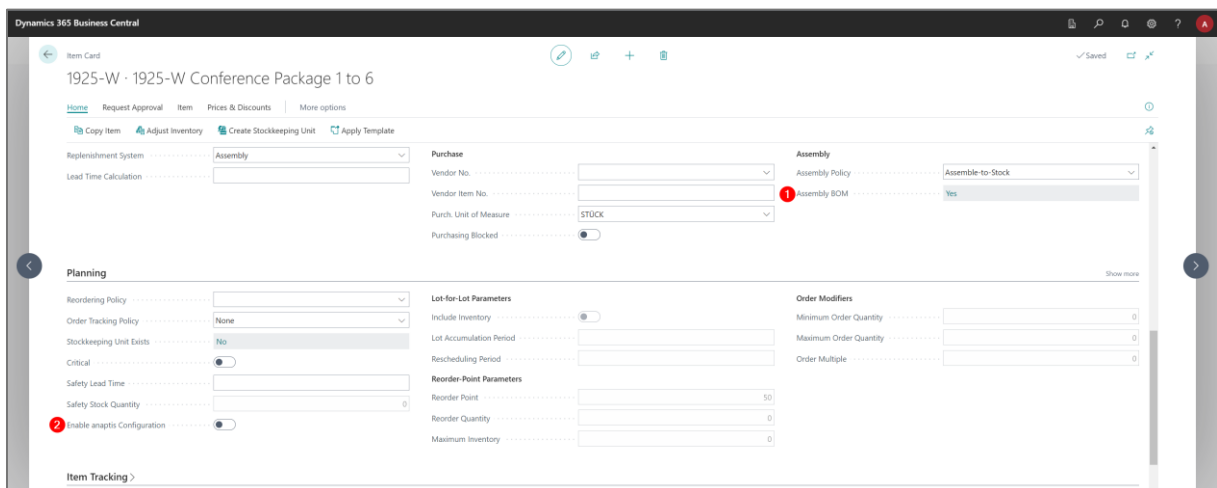


Illustration 15: Item card with assembly bill of materials and without active anaptis Configuration

As soon as the option *With anaptis Configuration* is activated for an item, the system will check if the item has an assembly bill of material. Then it will ask the user if an item variant (which is marked as default) should be created first.

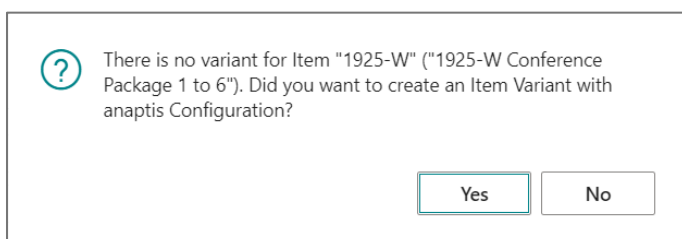


Illustration 16: Confirm initial item variant creation

When the app user experience is not set to "experienced" in the *anaptis Configuration Setup*, the creation of an item variant with this app is confirmed with a message.



Illustration 17: Confirmation for the item variant creation

In the open item card, the variants can be opened by the actions of the page and can be found with the search. To go via the actions of the page, click on the magnifying glass at the top right of the bar. You can now enter the search term "variant" in the search field. In the first area of the results, you will see on the current Page (item card). In this section, you will find the matches of the actions on the current page and the Item Variants of that record.

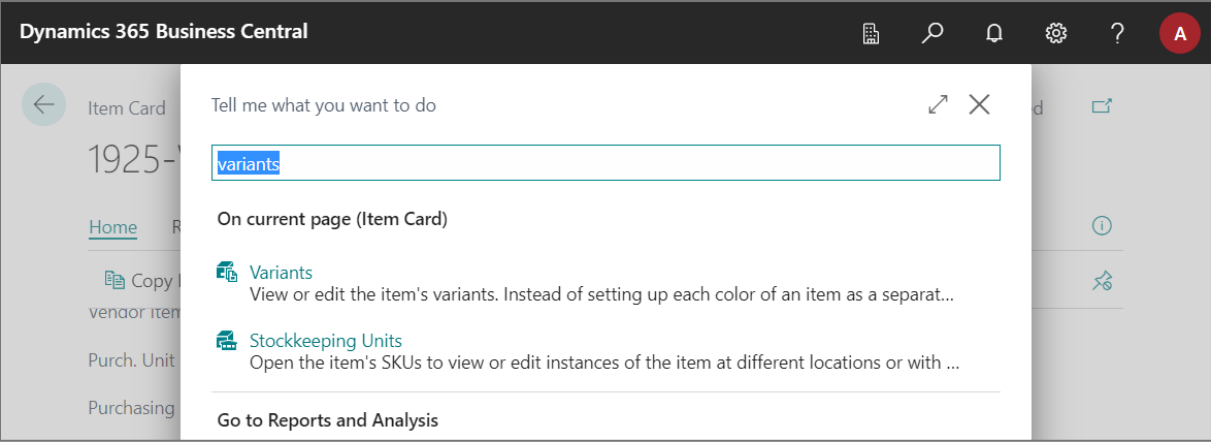


Illustration 18: Item card, „variants“ search results

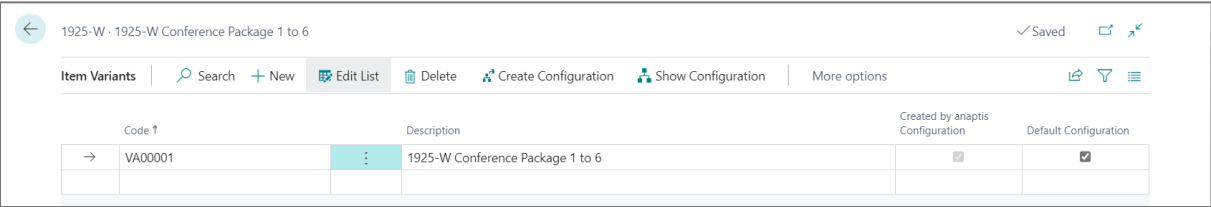


Illustration 19: Opened item variants

In the item variant list, you can now click on *Create Configuration*.

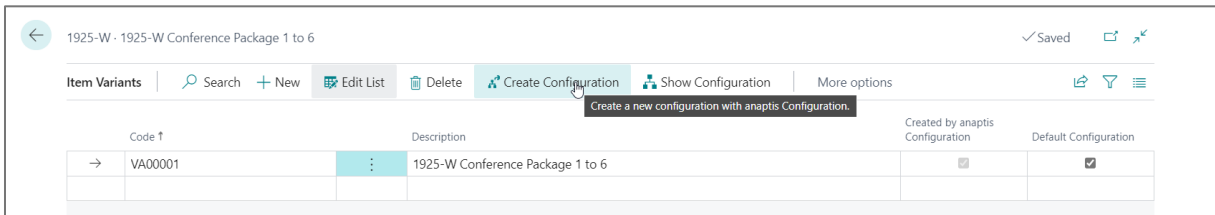


Illustration 20: Creation of a configuration

To create item variants with *anaptis Configuration*, you need components. When you create a new configuration, the starting components for the new item variant are asked.

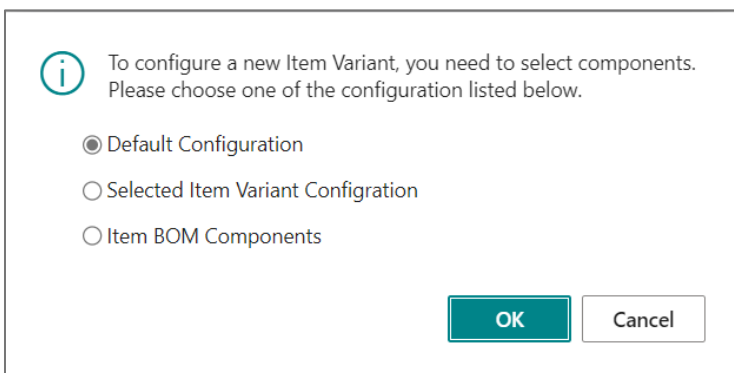


Illustration 21: Selection of start components for a new item variant

A configuration is now created from the bill of material list of that item. The content of the variant is displayed by clicking on *Show Configuration*.

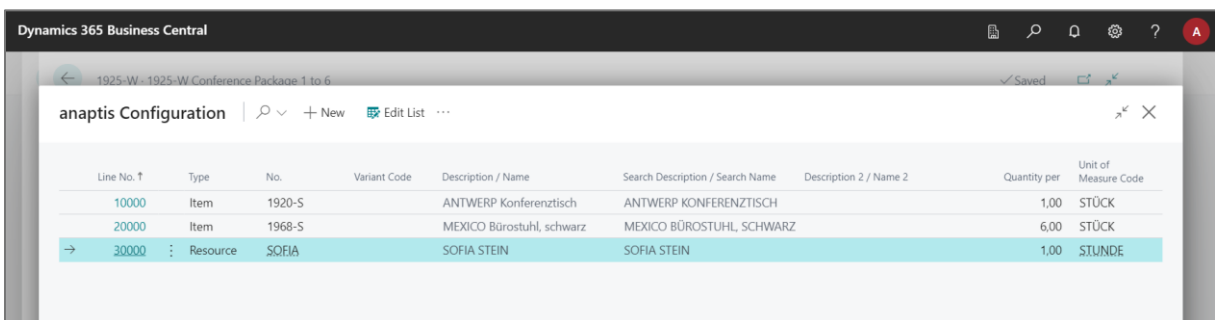


Illustration 22: Overview over the opened variant list

To change the variant components, the list must first be set to edit mode by clicking on the *Edit list* button. Then the components can be changed. You confirm the changes by clicking on the *OK* button.

The new list of components is used to check whether there is already another item variant with this configuration or if this is a new one, that has to be created. The appropriate variant is selected automatically. Here a new configuration is now created

from the components. With a click on the button *Show configuration* the content of the variant is displayed.

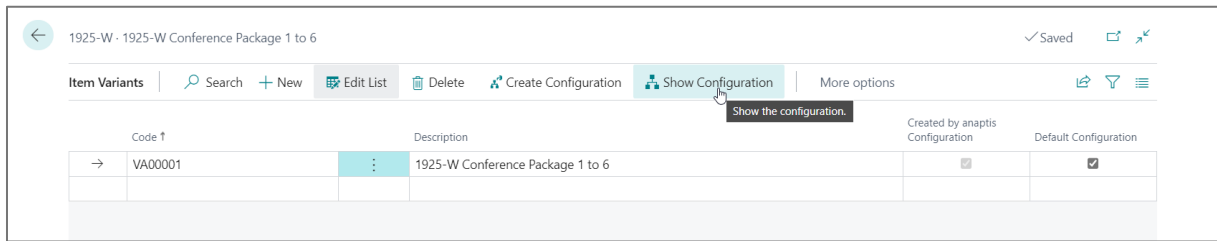


Illustration 23: Action „Show Configuration“ in item variant

In that page, you can view the components of this item variant.

Each variant can be selected as default variant out of the variant list. This variant will be set as default value when entering this item into a sales quote or order.

## 4 Preparation of a sales order

First a new sales order must be created. To do this, click on *Sale* and then on *Sales orders*.

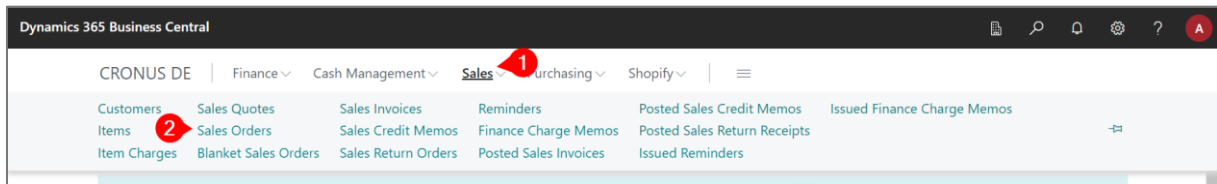


Illustration 24: Overview over sales orders

Then create a new sales order by clicking on *+ New* in the list.

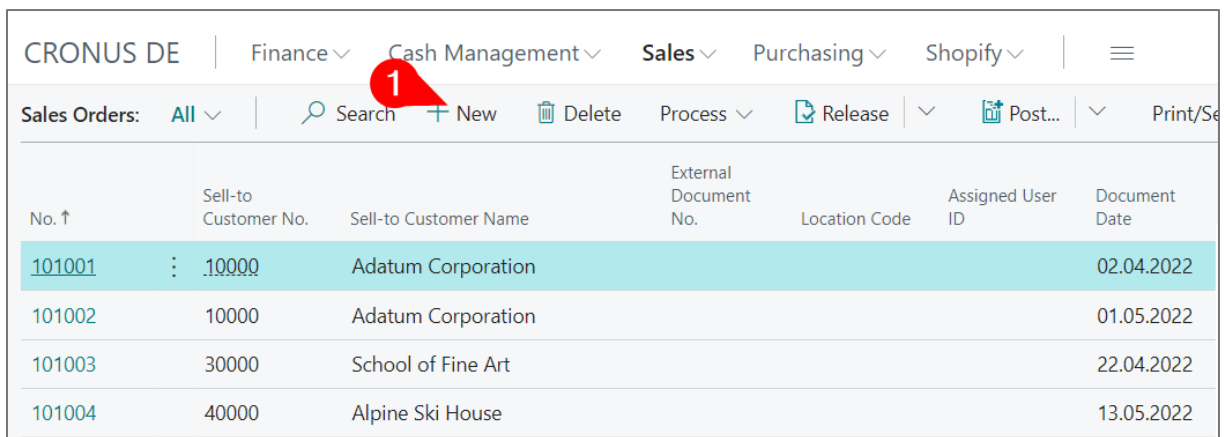


Illustration 25: Creation of a new sales order

## 5 Sales order and item variant creation

Items with variants can now be added to the sales order. In the example, *Conference Package 1 through 6* has been added to item *1925-W*.

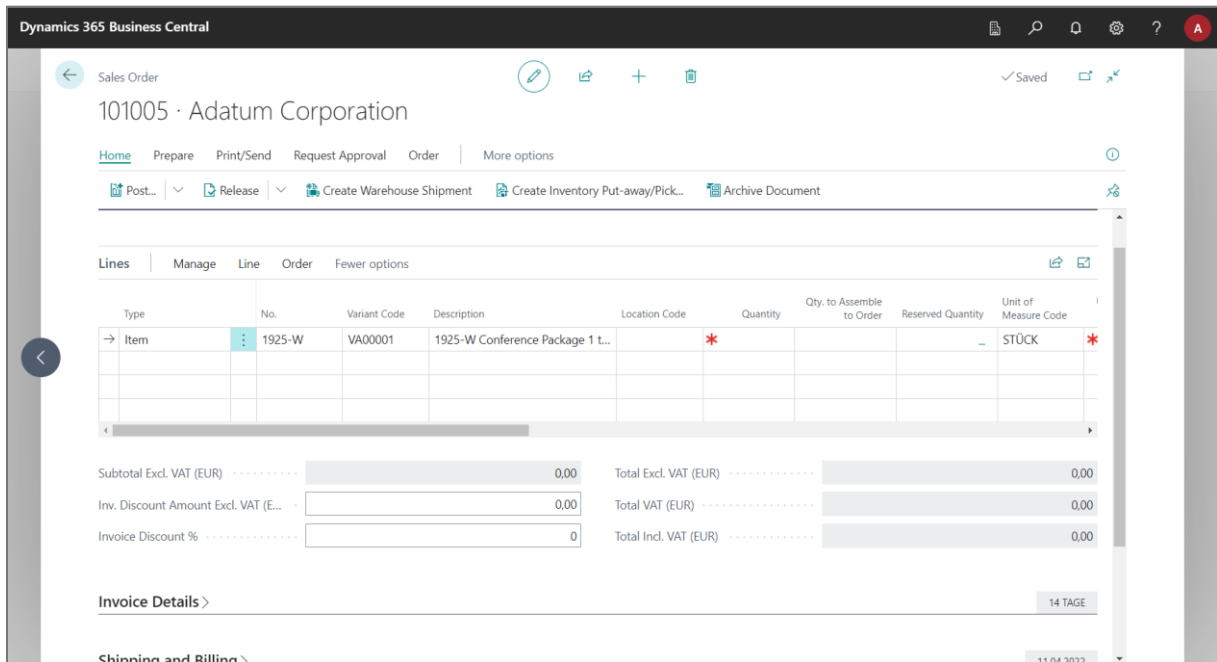


Illustration 26: Field "variant code" now exists

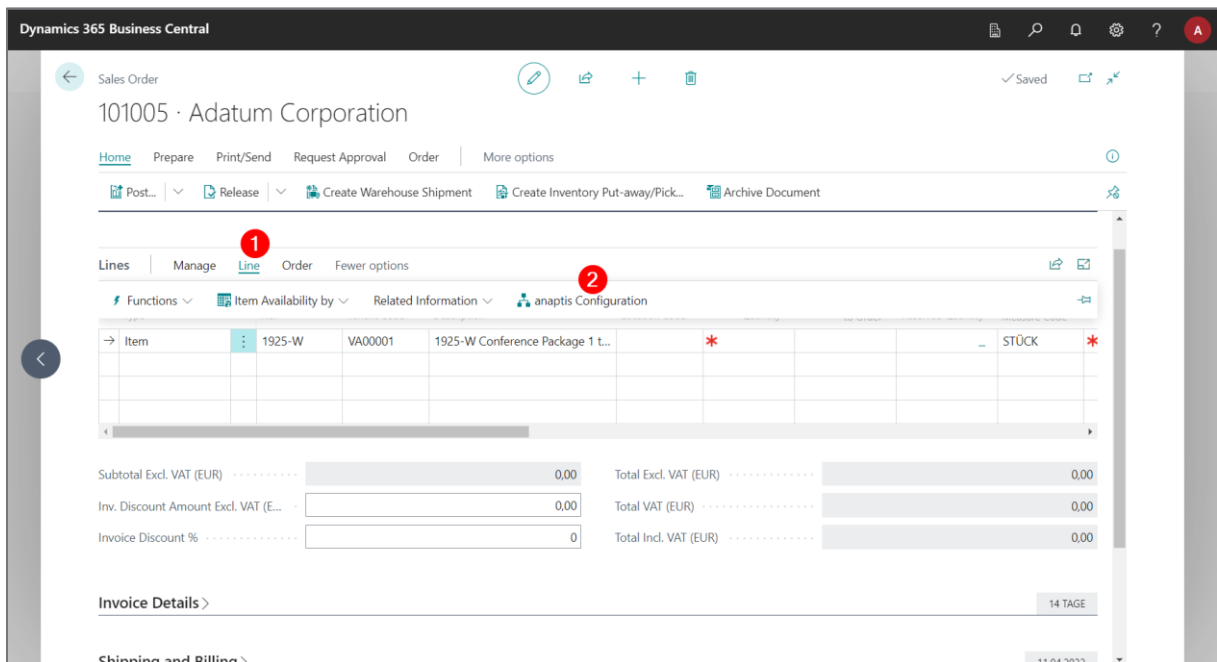


Illustration 27: Editing of the variant via row

To edit or view the components of this variant, click on *anaptis Configuration*. The variant can be edited in this page.

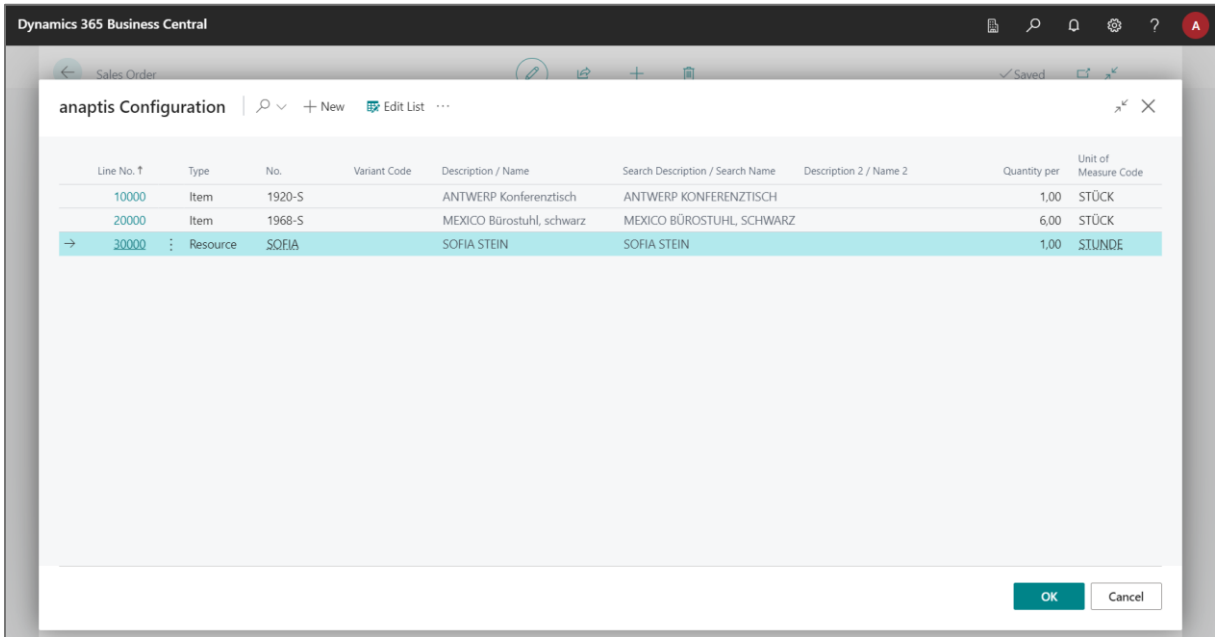


Illustration 28: List of components and resources

In the example shown, the item *AMSTERDAM Lampe* with the component quantity one was added.

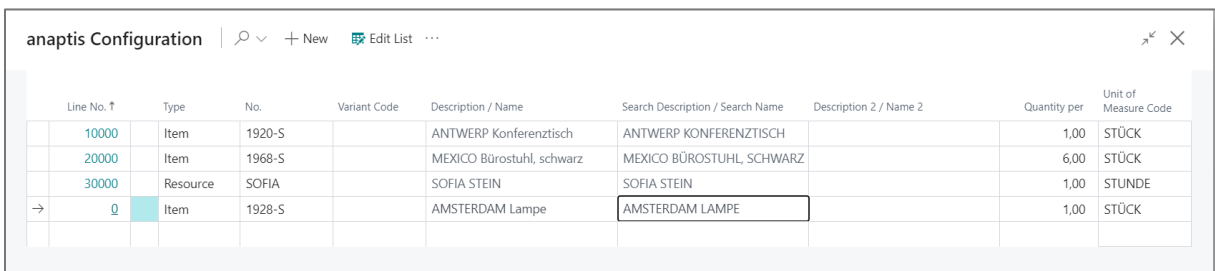


Illustration 29: Adding a new resource

After confirming by clicking the *OK* button, it is apparent that a new variant (V00002) has been created.

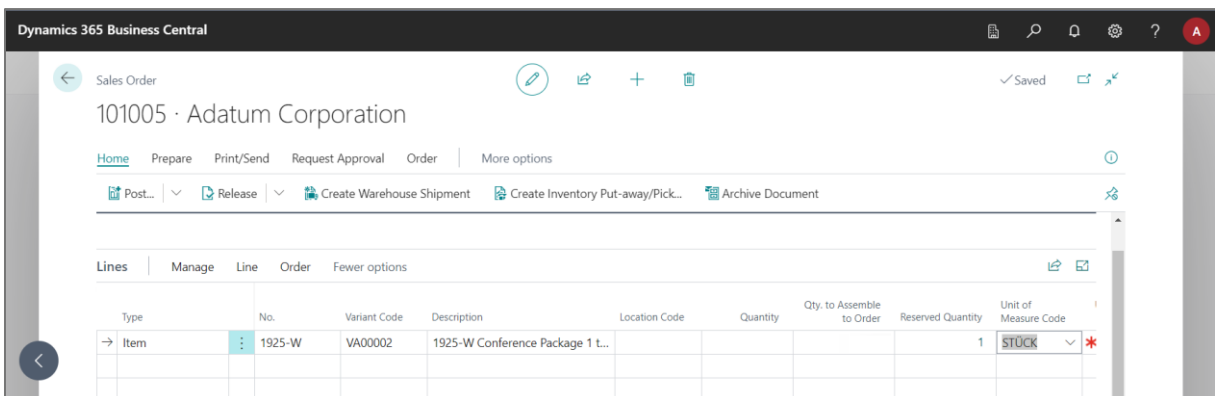


Illustration 30: Display of a new variant

Now the quantity as well as the quantity for the assembly order must be set.



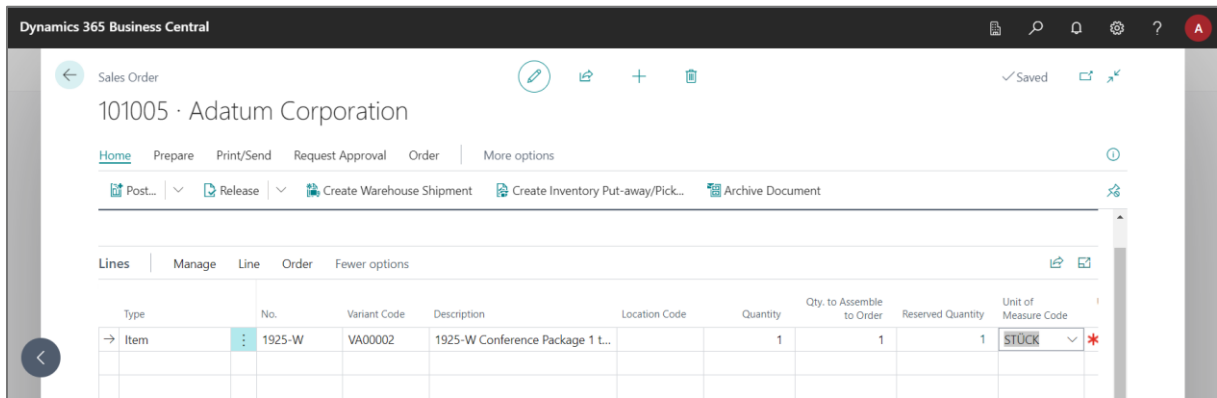


Illustration 31: Determination of the quantity for order assembly

A warning is displayed if the specified order assembly quantity needs more items than are available in the inventory. This warning can be configured from the Dynamics 365 Business Standard (stock warning in the assembly setup).

In this example, Dynamics 365 Business Central has automatically created an assembly order.

## 6 Review of the assembly order

To get to the assembly orders, click on the magnifying glass and search for “assembly orders”.

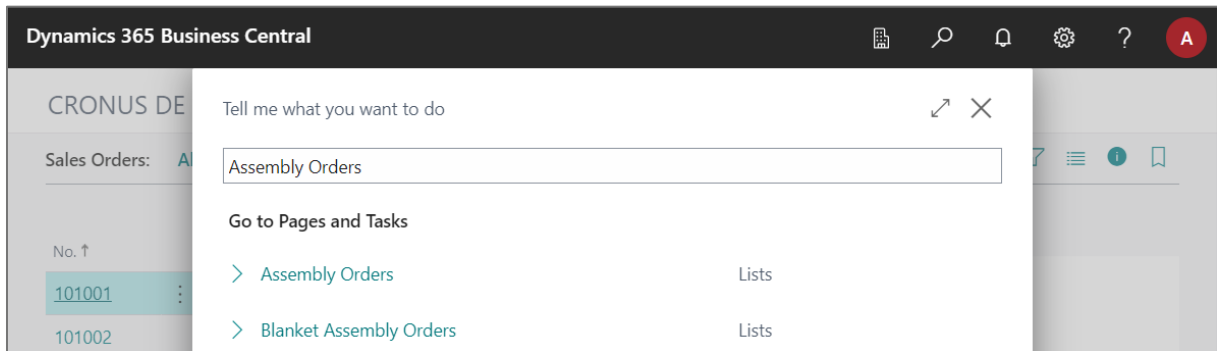


Illustration 32: Searching an assembly order

Then select the *assembly orders* so that the list opens.

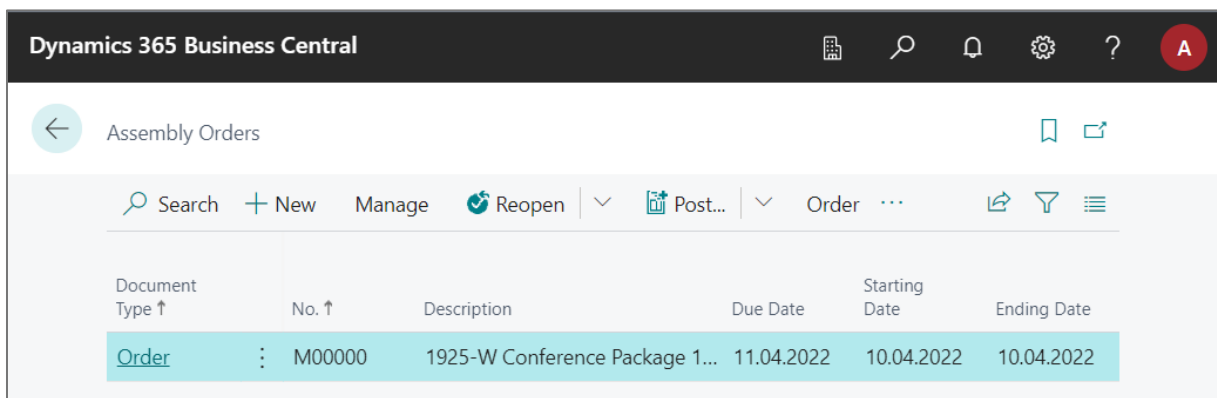


Illustration 33: Showing the list of assembly orders

The assembly order created by Dynamics 365 Business Central can now be viewed directly in the assembly order list. In the assembly order opened here, the variant and its components that is used can now be seen here.

Dynamics 365 Business Central

Assembly Order

M00000 · 1925-W Conference Package 1 to 6

Home Prepare Print Warehouse Order More options

Post... Release Show Availability

Avail. Warni...	Type	No.	Description	Variant Code	Location Code	Unit of Measure C
→	Item	1920-S	ANTWERP Konferenztisch			STÜCK
Yes	Item	1968-S	MEXICO Bürostuhl, schwarz			STÜCK
	Resource	SOFIA	SOFIA STEIN			STUNDE
	Item	1928-S	AMSTERDAM Lampe			STÜCK

Posting

Variant Code ..... VA00002 **1** Cost Amount ..... 0,00

Location Code ..... Department Code .....

Bin Code ..... Customergroup Code .. MITTEL

Unit Cost ..... 0,00

Details Attachments (0)

Assembly Item - Details

Item No. 1925-W  
Standard Cost 1.486,10  
Unit Price 189,80

Component - Item

Item No. 1920-S  
Required Quantity 1

Availability

Due Date 10.04.22  
Item Availability 8  
Available Inventory 10  
Scheduled Receipt  
Reserved Receipt  
Gross Requirement 2  
Reserved Requirement

Illustration 34: View the selected variant