



# **TECH TRADE**

## **AVAILABILITY INDICATORS**

**V1.14.0.0**

**IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL**

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**USER SCENARIO DOCUMENTATION**

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## Change Log

Version number	Description
V1.8.0.0	Initial released version
V1.12.0.0	Added nl-BE translations to the app.
V1.14.0.0	Rebranding of app.

## Introduction

The Tech Trade Availability Indicators extension provides a collection of features and improved and new functionalities that will benefit many Microsoft Dynamics 365 Business Central customers active in the trade sector. These functionalities are developed for companies active in the wholesale of technical goods, but not limited to those companies, as the functionalities will benefit many other companies that are maintain stock.

For many companies, the insight in the available stock is a daily struggle. We at Apportunix are serving wholesale companies for multiple decades. We now bring the knowledge and experience we have gathered during the years, to the Dynamics 365 Business Central business platform!

The Tech Trade Availability Indicators extension, provides you with insight in the available stock by:

- ✓ Having direct insight in the availability of an item in your documents, not with a number, but with a meaningful color:
  - Green = enough free stock
  - Orange = no free stock, but enough replenishment is planned
  - Red = Call to action: not enough stock or replenishment is planned yet
- ✓ See directly from the sales line, whether the materials for the attached assembly order are on stock
- ✓ Having a helicopter view on the order(line)s that can be shipped to the customer

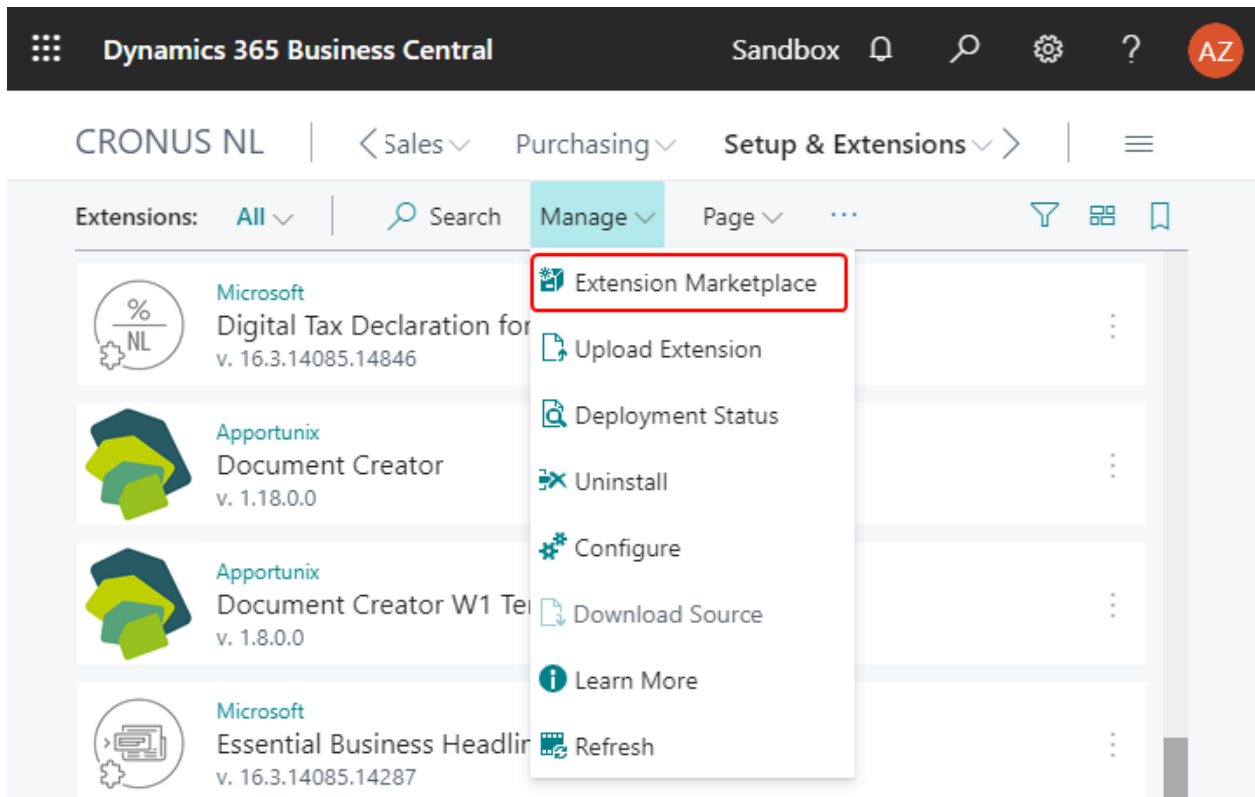
Tech Trade Availability Indicators functionality is integrated in the sales orders, transfer orders and assembly orders.

The details of the functionality above will be presented in the next chapters of this documentation

## Installation

The Tech Trade Availability Indicators extension can be installed from the Extension Marketplace (AppSource). To install the extension, please follow the following steps:

1. In Microsoft Dynamics 365 Business Central, go to **Setup & Extensions > Extensions**
2. Open the Extension Marketplace (AppSource) via: **Manage > Extension Marketplace**




3. Search for and select "Tech Trade Availability Indicators" (By Apporunix)




Trials  Pricing Model   
Ratings

**App results (1)**



**Tech Trade Availability Indicators**  
By WSB Solutions BV

★★★★★ (1)



4. Please take note of the End-User License Agreement and Privacy Statement
5. Choose **GET IT NOW**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.

Apps > **Tech Trade Availability Indicators**



## Tech Trade Availability Indicators [save for later](#)

Apportunix

★★★★★ 5.0 (1)

Free trial

Overview [Reviews](#)

FREE TRIAL

**Products**

[Dynamics 365 Business Central](#)

**Publisher**

Apportunix

**Acquire Using**

Work or school account

**Version**

1.14.0.0

**Categories**

[Operations & Supply Chain](#)

[Productivity](#)

[Sales](#)

**Industries**

[Distribution](#)

[Manufacturing & Resources](#)

**Products supported**

SANA

Magento

**Support**

[Support](#)

See in one glance what orders can be shipped and have direct insight in stock levels in your orders!

*"Do I have enough in stock to ship this item to the customer?".* How many times a day are you looking for the answer to this question?

One of the key tasks for most wholesale companies is keeping stock as low as possible, without affecting the reliability of the deliveries too much. One should be able to make quick and easy decisions on the following questions:

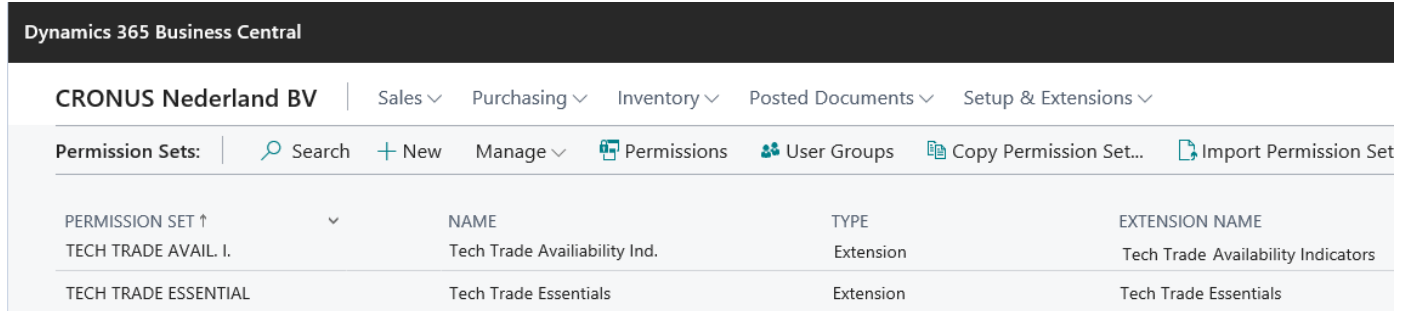
- Which shipping dates can I promise to my customer?
- Which orders can be shipped now?

This app provides the user with some powerful insights: in the order lines (sales, transfer, assembly), we have added a colored indicator that tells the user whether the the order line can be shipped: a green indicator means: "sufficient stock to cover all of the current needs". An orange indicator tells the user that there is currently no stock, but enough replenishment is already planned. And a red indicator means that the new replenishment should be planned, otherwise there will be a shortage for the item. Besides these basic functions, we have added some combinations of the aforementioned colors.

*"But what if I assemble items?"*

## Permissions Configuration

Once Tech Trade Availability Indicators extension has been installed, the permission set TECH TRADE AVAIL. I. has been added to the system.



The screenshot shows the Dynamics 365 Business Central interface for the 'CRONUS Nederland BV' organization. The top navigation bar includes 'Sales', 'Purchasing', 'Inventory', 'Posted Documents', and 'Setup & Extensions'. Below this is a 'Permission Sets' section with a search bar and buttons for '+ New', 'Manage', 'Permissions', 'User Groups', 'Copy Permission Set...', and 'Import Permission Set...'. A table lists two permission sets:

PERMISSION SET ↑	NAME	TYPE	EXTENSION NAME
TECH TRADE AVAIL. I.	Tech Trade Availability Ind.	Extension	Tech Trade Availability Indicators
TECH TRADE ESSENTIAL	Tech Trade Essentials	Extension	Tech Trade Essentials

This permission set should be assigned to relevant users or user groups.

To assign the TECH TRADE AVAIL. I. permission set to users:

1. Choose the Lightbulb icon on the top right corner of the Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.
2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** FactBox.
3. Choose the **Edit** action to open the **User Card** page.
4. On the **User Permission Sets** FastTab, on a new line, fill in the Permission Set field with TECH TRADE AVAIL. I.

For more information, please refer to Dynamics 365 Business Central documentation - [Managing Users and Permissions](#)













## Setup and Usage

This chapter provides details about how to set-up and use the functionality of this extension and will present several examples and scenarios to demonstrate the functionalities. A basic understanding of how to work with Microsoft Dynamics 365 Business Central is presumed.

### Availability Indicators

This module is built to quickly inform a Business Central user what the stock position of the item is, without working with the default reservation engine. The module does this with the help of several colored tiles.

We have provided the following tiles:

NR.	AFBEELDING
0	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

This module works in the following documents:

- Sales Orders
- Transfer Orders
- Assembly Orders

The functionality is described for each of these documents in the following paragraphs.

### Availability Indicators in Sales Orders

When entering an item in a sales order, the user does not see the stock position by default on the screen straight away. Therefore, we have built the following availability indicators for line type Item:

*None/White*: the order line is completely shipped. In the following example there is nothing left to ship:

← SALES ORDER | WERKDATUM: 28-1-2021

1007 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

**General** Meer tonen

No. 1007 Due Date 31-1-2021

Customer Name Spotsmeyer's Furnishings Requested Delivery Date

Contact Mr. Mike Nash External Document No.

Posting Date 28-1-2021 Manual price No

Order Date 28-1-2021

**Lines** | Manage Line Order Minder opties

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99001	BREDA, office desk pro	BLAUW	1			-	STUKS

**Green:** the quantity on stock is sufficient for the open sales orders. The calculation for the green indicator is: Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is smaller than the Inventory. In the example below the inventory is sufficient for shipping the sales order line:

← SALES ORDER | WERKDATUM: 28-1-2021

1008 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

**General** Meer tonen

No. 1008 Due Date 31-1-2021

Customer Name Spotsmeyer's Furnishings Requested Delivery Date

Contact Mr. Mike Nash External Document No.

Posting Date 28-1-2021 Manual price No

Order Date 28-1-2021

**Lines** | Manage Line Order Minder opties

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99001	BREDA, office desk pro	BLAUW	1			-	STUKS

**Orange:** there is no inventory but the sum of the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) are equal to or larger than the quantity of the demand lines. See the example below:

← SALES ORDER | WERKDATUM: 28-1-2021

1008 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

**General** Meer tonen

Customer Name: Spotsmeyer's Furnishings Due Date: 31-1-2021  
 Contact: Mr. Mike Nash Requested Delivery Date:   
 Posting Date: 28-1-2021 External Document No.:   
 Order Date: 28-1-2021 Manual price: No

**Lines** | Manage Line Order Minder opties

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99008	BREDA, office chair pro	BLAUW	1			-	STUKS

**Red:** there is no inventory to fulfill the entire need in demand lines. There is also no supply to fulfill this need. See the example below:

← SALES ORDER | WERKDATUM: 28-1-2021

1008 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

**General** Meer tonen

Customer Name: Spotsmeyer's Furnishings Due Date: 31-1-2021  
 Contact: Mr. Mike Nash Requested Delivery Date:   
 Posting Date: 28-1-2021 External Document No.:   
 Order Date: 28-1-2021 Manual price: No

**Lines** | Manage Line Order Minder opties

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99008	BREDA, office chair pro	BLAUW	1			-	STUKS

**Red/Green:** Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is larger than the Inventory, but there is some inventory available to ship and not enough available in the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) to fulfill in the needs. See the example below:

← SALES ORDER | WERKDATUM: 28-1-2021

1008 · Spotsmeyer's Furnishings

✕ The available inventory for item 99001 is lower than the entered quantity at this location. [Show details](#)

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

**General** Meer tonen

Customer Name ..... Spotsmeyer's Furnishings ▾ Due Date ..... 31-1-2021 📅  
 Contact ..... Mr. Mike Nash ... Requested Delivery Date ..... 📅  
 Posting Date ..... 28-1-2021 📅 External Document No. ....  
 Order Date ..... 28-1-2021 📅 Manual price ..... No

**Lines** | Manage Line Order Minder opties 🔗

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99001	BREDA, office desk pro	BLAUW	400			-	STUKS

**Orange/Green:** Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is bigger than the Inventory, but there is some inventory available to ship and enough available in the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) to fulfill in the needs for all the demand lines. See the example below:

← SALES ORDER | WERKDATUM: 28-1-2021

1008 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

**General** Meer tonen

Customer Name ..... Spotsmeyer's Furnishings ▾ Due Date ..... 31-1-2021 📅  
 Contact ..... Mr. Mike Nash ... Requested Delivery Date ..... 📅  
 Posting Date ..... 28-1-2021 📅 External Document No. ....  
 Order Date ..... 28-1-2021 📅 Manual price ..... No

**Lines** | Manage Line Order Minder opties 🔗

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99001	BREDA, office desk pro	BLAUW	400			-	STUKS

**Green/BOM icon:** The BOM icon shows that the sales line is an “assemble to order” sales line. The needed quantity on the assembly components are available on stock to fulfill in the needs for all the demand lines because the sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is smaller than the Inventory. See the example below:

SALES ORDER | WERKDATUM: 28-1-2021

## 1008 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

**General** Meer tonen

Customer Name: Spotsmeyer's Furnishings Due Date: 31-1-2021  
 Contact: Mr. Mike Nash Requested Delivery Date:  
 Posting Date: 28-1-2021 External Document No.:  
 Order Date: 28-1-2021 Manual price: No

**Lines** | Manage Line Order Minder opties

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99005	Set of filters	BLAUW	1		1	1	STUKS

**Orange/BOM icon:** The BOM icon shows that the sales line is an “assemble to order” sales line. The needed quantity on the assembly components are not available on stock to fulfill in the needs for all the demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) but the quantity in supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) is enough to fulfill the demand. See the example below:

SALES ORDER | WORK DATE: 28-1-2021

## 1010 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached More options

**General** Show more

Customer Name: Spotsmeyer's Furnishings Due Date: 31-1-2021  
 Contact: Mr. Mike Nash Requested Delivery Date:  
 Posting Date: 28-1-2021 External Document No.:  
 Order Date: 28-1-2021 Manual price: No

**Lines** | Manage Line Order Fewer options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99006	Set of filters	GEEL	1		1	1	STUKS

**Orange/Green/BOM icon:** The BOM icon shows that the sales line is an “assemble to order” sales line. The needed quantity on the assembly components is not completely available on stock to fulfill the demand for all lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) but the quantity in supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) is enough to fulfill the demand. See the example below:

← SALES ORDER | WERKDATUM: 28-1-2021 ✎ + 🗑

## 1008 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Meer opties

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**General** Meer tonen

Customer Name	Spotsmeyer's Furnishings	Due Date	31-1-2021
Contact	Mr. Mike Nash	Requested Delivery Date	
Posting Date	28-1-2021	External Document No.	
Order Date	28-1-2021	Manual price	No

---

**Lines** | Manage Line Order Minder opties 🔗

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99005	Set of filters	BLAUW	3		3	3	STUKS
					+			

**Red/BOM icon:** The BOM icon shows that the sales line is an “assemble to order” sales line. There is no inventory to fulfill the need in demand lines. There are also no supply lines to fulfill in this need. See the example below

← SALES ORDER | WORK DATE: 28-1-2021 ✎ + 🗑

## 1012 · London Candoxy Storage Campus

Process Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached More options

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**General** Show more

Customer Name	London Candoxy Storage Campus	Due Date	31-1-2021
Contact	Mr. John Kane	Requested Delivery Date	
Posting Date	28-1-2021	External Document No.	
Order Date	28-1-2021	Manual price	No

---

**Lines** | Manage Line Order Fewer options 🔗

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICAT...	QTY. TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE
Item	99006	Set of filters	GEEL	1		1	1	STUKS
					+			
					+			

### Availability Indicators in Assembly Orders

When entering an item in an assembly order, the user default does not see the stock position on the screen straight away. Therefore we have built the following availability indicators for line type Item:

**None/White:** the order line is completely consumed. In the following example there is nothing to consume:

← ASSEMBLY ORDER | WORK DATE: 28-1-2021

A00003 · Set of filters

Process Release Warehouse Posting Print Navigate Order Show Attached More options

**General**

No. A00003 Due Date 28-1-2021  
 Item No. 99005 Starting Date 27-1-2021  
 Description Set of filters Ending Date 27-1-2021  
 Quantity 3 Remaining Quantity 0  
 Quantity to Assemble 0 Assembled Quantity 3  
 Unit of Measure Code STUKS Assemble to Order Yes  
 Posting Date 28-1-2021 Status Open

**Lines** Manage More options

AVAIL. WAR...	TYPE	NO.	DESCRIPTION	LOCATION CODE	UNIT OF MEASURE CODE	QUANTITY PER	QUANTITY	AVAILABI... INDICAT...	QUANTITY CONSU
	Item	1000	Fiets	BLAUW	STUKS	1	3		

**Green:** the quantity on stock is sufficient for the open demand lines. The calculation for the green indicator is: Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is smaller than the Inventory. In the example below the inventory is sufficient for consuming the assembly order line:

← ASSEMBLY ORDER | WORK DATE: 28-1-2021

A00003 · Set of filters

Process Release Warehouse Posting Print Navigate Order Show Attached More options

**General**

No. A00003 Due Date 28-1-2021  
 Item No. 99005 Starting Date 27-1-2021  
 Description Set of filters Ending Date 27-1-2021  
 Quantity 3 Remaining Quantity 3  
 Quantity to Assemble 3 Assembled Quantity 0  
 Unit of Measure Code STUKS Assemble to Order Yes  
 Posting Date 28-1-2021 Status Open

**Lines** Manage More options

AVAIL. WAR...	TYPE	NO.	DESCRIPTION	LOCATION CODE	UNIT OF MEASURE CODE	QUANTITY PER	QUANTITY	AVAILABI... INDICAT...	QUANTITY CONSU
	Item	1110	Velg	BLAUW	STUKS	1	3		

**Orange:** there is no inventory but the sum of the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) is similar to or larger than the quantity of the demand lines. See the example below, there is enough in demand lines to consume the assembly order line:

← ASSEMBLY ORDER | WORK DATE: 28-1-2021

A00003 · Set of filters

✕ The available inventory for item 1000 is lower than the entered quantity at this location. Show details

Process Release Warehouse Posting Print Navigate Order Show Attached More options

**General**

No. A00003 Due Date 28-1-2021  
 Item No. 99005 Starting Date 27-1-2021  
 Description Set of filters Ending Date 27-1-2021  
 Quantity 3 Remaining Quantity 3  
 Quantity to Assemble 3 Assembled Quantity 0  
 Unit of Measure Code STUKS Assemble to Order Yes  
 Posting Date 28-1-2021 Status Open

**Lines** Manage More options

AVAIL. WAR...	TYPE	NO.	DESCRIPTION	LOCATION CODE	UNIT OF MEASURE CODE	QUANTITY PER	AVAILABI... INDICAT...	QUANTITY	QUANTITY CONSU
Yes	Item	1000	Fiets	BLAUW	STUKS	1		3	

**Red:** there is no inventory to fulfill the need in demand lines. There are also no supply lines to fulfill in this needs. See the example below:

← ASSEMBLY ORDER | WORK DATE: 28-1-2021

A00003 · Set of filters

✕ The available inventory for item 1000 is lower than the entered quantity at this location. Show details

Process Release Warehouse Posting Print Navigate Order Show Attached More options

**General**

No. A00003 Due Date 28-1-2021  
 Item No. 99005 Starting Date 27-1-2021  
 Description Set of filters Ending Date 27-1-2021  
 Quantity 3 Remaining Quantity 3  
 Quantity to Assemble 3 Assembled Quantity 0  
 Unit of Measure Code STUKS Assemble to Order Yes  
 Posting Date 28-1-2021 Status Open

**Lines** Manage More options

AVAIL. WAR...	TYPE	NO.	DESCRIPTION	LOCATION CODE	UNIT OF MEASURE CODE	QUANTITY PER	AVAILABI... INDICAT...	QUANTITY	QUANTITY CONSU
Yes	Item	1000	Fiets	BLAUW	STUKS	1		3	

**Red/Green:** Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is bigger than the Inventory, but there is



some inventory available to ship or consume and not enough available in the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) to fulfill in the total needs. See the example below:

← ASSEMBLY ORDER | WORK DATE: 28-1-2021 ✎ + 🗑

## A00003 · Set of filters

✕ The available inventory for item 1000 is lower than the entered quantity at this location. [Show details](#)

Process Release Warehouse Posting Print Navigate Order Show Attached More options

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**General**

No. ....	A00003	Due Date .....	28-1-2021
Item No. ....	99005	Starting Date .....	27-1-2021
Description .....	Set of filters	Ending Date .....	27-1-2021
Quantity .....	3	Remaining Quantity .....	3
Quantity to Assemble .....	3	Assembled Quantity .....	0
Unit of Measure Code .....	STUKS	Assemble to Order .....	Yes
Posting Date .....	28-1-2021	Status .....	Open

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**Lines** | Manage More options

AVAIL. WAR...	TYPE	NO.	DESCRIPTION	LOCATION CODE	UNIT OF MEASURE CODE	QUANTITY PER	AVAILABI... INDICAT...	QUANTITY	QUANTITY CONSU
Yes	Item	1000	Fiets	BLAUW	STUKS	1	🟡🟢	3	

*Orange/Green:* Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is larger than the Inventory, but there is some inventory available to ship and enough available in the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) to fulfill in the needs for all the demand lines. See the example below:

← ASSEMBLY ORDER | WORK DATE: 28-1-2021



## A00003 · Set of filters

✕ The available inventory for item 1000 is lower than the entered quantity at this location. [Show details](#)

Process Release Warehouse Posting Print Navigate Order Show Attached More options

**General**

No. ....	A00003 ...	Due Date .....	28-1-2021
Item No. ....	99005	Starting Date .....	27-1-2021
Description .....	Set of filters	Ending Date .....	27-1-2021
Quantity .....	3	Remaining Quantity .....	3
Quantity to Assemble .....	3	Assembled Quantity .....	0
Unit of Measure Code .....	STUKS	Assemble to Order .....	Yes
Posting Date .....	28-1-2021	Status .....	Open

**Lines** | Manage More options

AVAIL. WAR...	TYPE	NO.	DESCRIPTION	LOCATION CODE	UNIT OF MEASURE CODE	QUANTITY PER	AVAILABI... INDICAT...	QUANTITY	QUANTITY CONSU
Yes	Item	1000	Fiets	BLAUW	STUKS	1		3	

## Availability Indicators in Transfer Orders

When entering an item in a transfer order, the user default does not see the stock position on the screen straight away. Therefore, we have built the following availability indicators for line type Item:

*None/White*: the transfer order line is completely shipped. In the following example there is nothing to ship:

← TRANSFER ORDER | WORK DATE: 28-1-2021



## 1014

Report Release Posting Order Print/Send Navigate Show Attached More options

**General** Show more

Transfer-from Code .....	ROOD	In-Transit Code .....	OUT. LOG.
Transfer-to Code .....	BLAUW	Posting Date .....	28-1-2021
Direct Transfer .....	<input type="checkbox"/>	Status .....	Released

**Lines** | Manage More options

ITEM NO.	DESCRIPTION	QUANTITY	AVAILABI... INDICAT...	RESERVED QUANTITY INBND.	RESERVED QUANTITY SHIPPED	RESERVED QUANTITY OUTBND.	UNIT OF MEASURE CODE	QTY. TO S
99001	BREDA, office desk pro	1		-	-	-	STUKS	
			+					
			+					
			+					

**Green:** the quantity on stock is sufficient for the open demand lines. The calculation for the green indicator is: Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is smaller than the Inventory. In the example below the inventory is sufficient for shipping the transfer order line:

TRANSFER ORDER | WORK DATE: 28-1-2021

1013

Report Release Posting Order Print/Send Navigate Show Attached More options

**General** Show more

Transfer-from Code: BLAUW In-Transit Code: OUT. LOG.  
 Transfer-to Code: ROOD Posting Date: 28-1-2021  
 Direct Transfer:  Status: Open

**Lines** Manage More options

ITEM NO.	DESCRIPTION	QUANTITY	AVAILABI... INDICAT...	RESERVED QUANTITY INBND.	RESERVED QUANTITY SHIPPED	RESERVED QUANTITY OUTBND.	UNIT OF MEASURE CODE	QTY. TO S
99001	BREDA, office desk pro	1	■	-	-	-	STUKS	
			+					
			+					
			+					

**Orange:** there is no inventory but the sum of the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) is similar to or bigger than the quantity of the demand lines. See the example below:

TRANSFER ORDER | WORK DATE: 28-1-2021

1014

Report Release Posting Order Print/Send Navigate Show Attached More options

**General** Show more

Transfer-from Code: ROOD In-Transit Code: OUT. LOG.  
 Transfer-to Code: BLAUW Posting Date: 28-1-2021  
 Direct Transfer:  Status: Open

**Lines** Manage More options

ITEM NO.	DESCRIPTION	QUANTITY	AVAILABI... INDICAT...	RESERVED QUANTITY INBND.	RESERVED QUANTITY SHIPPED	RESERVED QUANTITY OUTBND.	UNIT OF MEASURE CODE	QTY. TO S
99001	BREDA, office desk pro	3	■	-	-	-	STUKS	
			+					
			+					
			+					

**Red:** there is no inventory to fulfill the need in demand lines. There are also no supply lines to fulfill in this needs. See the example below:

TRANSFER ORDER | WORK DATE: 28-1-2021

1014

Report Release Posting Order Print/Send Navigate Show Attached More options

**General** Show more

Transfer-from Code:  In-Transit Code:   
 Transfer-to Code:  Posting Date:   
 Direct Transfer:  Status:

ITEM NO.	DESCRIPTION	QUANTITY	AVAILABI... INDICAT...	RESERVED QUANTITY INBND.	RESERVED QUANTITY SHIPPED	RESERVED QUANTITY OUTBND.	UNIT OF MEASURE CODE	QTY. TO :
99001	BREDA, office desk pro	3		-	-	-	STUKS	
			+					
			+					
			+					

*Red/Green*: Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is bigger than the Inventory, but there is some inventory available to ship and not enough available in the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) to fulfill in the needs. See the example below:

TRANSFER ORDER | WORK DATE: 28-1-2021

1014

Report Release Posting Order Print/Send Navigate Show Attached More options

**General** Show more

Transfer-from Code:  In-Transit Code:   
 Transfer-to Code:  Posting Date:   
 Direct Transfer:  Status:

ITEM NO.	DESCRIPTION	QUANTITY	AVAILABI... INDICAT...	RESERVED QUANTITY INBND.	RESERVED QUANTITY SHIPPED	RESERVED QUANTITY OUTBND.	UNIT OF MEASURE CODE	QTY. TO :
<input type="text" value="99001"/>	BREDA, office desk pro	3		-	-	-	STUKS	
			+					
			+					
			+					

*Orange/Green*: Sum of all demand lines (Qty. on Sales Order + Qty. on Purch. Return + Qty. on Component Lines + Qty. on Asm. Component + Trans. Ord. Shipment (Qty.) + Qty. on Service Order) is bigger than the Inventory, but there is some inventory available to ship and enough available in the supply lines (Qty. on Purch. Order + Qty. on Assembly Order + Trans. Ord. Receipt (Qty.) + Qty. on Sales Return + Qty. on Prod. Order) to fulfill in the needs for all the demand lines. See the example below:

TRANSFER ORDER | WORK DATE: 28-1-2021

1014

Report Release Posting Order Print/Send Navigate Show Attached More options

**General** Show more

Transfer-from Code: ROOD In-Transit Code: OUT. LOG.  
 Transfer-to Code: BLAUW Posting Date: 28-1-2021  
 Direct Transfer:  Status: Open

**Lines** | Manage More options

ITEM NO.	DESCRIPTION	QUANTITY	AVAILABI... INDICAT...	RESERVED QUANTITY INBND.	RESERVED QUANTITY SHIPPED	RESERVED QUANTITY OUTBND.	UNIT OF MEASURE CODE	QTY. TO S
99001	BREDA, office desk pro	3		-	-	-	STUKS	
			+					
			+					
			+					

## Shipment Planning

This module is built to indicate a Business Central user to indicate which order you can probably ship and which order you can't ship. The page we build is called Shipment Planning and is the ultimate lay-out for your warehouse and shipment planning.

SHIPMENT PLANNING | WERKDATUM: 28-1-2021 ✓ OPGESLAGEN

New Process Actions Minder opties

NO.	SHIPMENT DATE	REQUES... DELIVERY DATE	PROMISED DELIVERY DATE	ORDER DATE	SHIPMENT METHOD CODE	LOCATION CODE	STATUS	AVAILABI... INDICAT... RED	AVAILABI... INDICAT... ORANGE	AVAILABI... INDICAT... GREEN	AVAILABI... INDICAT... SHIPMENT	LAST SHIPMENT DATE	SHIPPING ADVISE	NO. OF ORDER LINES	NO. OF SHIPPED LINES	NO. OF INVOICED LINES
1002	28-1-2021		28-1-2021	28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1003	28-1-2021		28-1-2021	28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1004	28-1-2021		28-1-2021	28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1005	28-1-2021		28-1-2021	28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1008	28-1-2021		28-1-2021	28-1-2021	EXW	GEEL	Open					28-1-2021	Partial	1	0	
1010	28-1-2021		28-1-2021	28-1-2021	EXW	GEEL	Open					28-1-2021	Partial	1	0	
101009	22-1-2021		22-1-2021	22-1-2021	EXW	ROOD	Released					22-1-2021	Partial	2	2	
101011	15-1-2021		15-1-2021	15-1-2021	EXW	ROOD	Released					15-1-2021	Partial	3	3	
101013	21-1-2021		21-1-2021	21-1-2021	EXW	GEEL	Released					21-1-2021	Partial	3	3	
101015	24-1-2021		24-1-2021	24-1-2021	EXW	GROEN	Released					24-1-2021	Partial	4	4	
101016	20-5-2019		20-5-2019	20-5-2019	EXW	BLAUW	Open					20-5-2019	Partial	3	1	
101017	29-1-2021		29-1-2021	29-1-2021	EXW		Open					29-1-2021	Partial	3	0	
101018	29-1-2021		29-1-2021	29-1-2021	EXW	GEEL	Open					29-1-2021	Partial	1	0	
101019	25-1-2021		25-1-2021	25-1-2021	EXW	GEEL	Released					25-1-2021	Partial	9	9	
101020	29-1-2021		29-1-2021	29-1-2021	EXW	GEEL	Open					29-1-2021	Partial	1	0	
101022	7-2-2021		7-2-2021	7-2-2021	EXW	ROOD	Open					7-2-2021	Partial	2	0	
101023	24-2-2021		24-2-2021	24-2-2021	EXW		Open					24-2-2021	Partial	2	0	
104001	20-1-2021		20-1-2021	20-1-2021	EXW	BLAUW	Open					20-1-2021	Partial	1	0	
104002	20-1-2021		20-1-2021	20-1-2021	EXW		Open					20-1-2021	Partial	3	0	

**Lines** | Manage

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	AVAILABI... INDICATOR	QUANTITY SHIPPED	SHIPMENT DATE	QTY. TO SHIP	QTY. TO INVOICE	PURCHASING CODE
Item	99001	Test beschikbaarheidskleuren 1	BLAUW	1		0	28-1-2021	1	1	



The screen shows you an overview of outstanding orders and which availability indicators are in the specific order. So for example, if one of the order lines has an green or partly green indicator, the availability indicator green field will be filled with a green icon. If one of the order lines has an red or partly red availability indicator, de availability indicator in the header will be red etc.

This screen also contains a sub form with the underlying order lines. You can select any order you like and view which order lines it contains and view the availability indicators of each line in the selected sales order. There is also an extra indicator called "Availability indicator shipment". This field can contain two colors:

*Green with a white truck:* when the shipping advice of the order is set to "partial", there must be at least one line with a green indicator, orange/green indicator, red/green indicator, green/BOM icon indicator, orange/green/BOM icon indicator. The green box with white truck says you can probably ship a part of this order to your customer. When the shipping advice of the order is completely, all lines of the order must have the green indicator and/or the green with a BOM icon indicator.

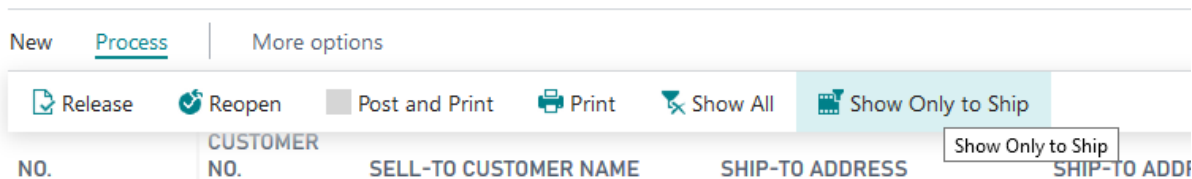
*None/white icon:* there is nothing to ship at the moment. For example, the lines are red, or the shipping advise is set to Completely, and you do not have all the items available at the moment.

For examples, see the following screenshot. The first line can be shipped partial, so the availability indicator shipment is filled even when there is a red availability indicator in the order. The second line doesn't have the availability indicator shipment, because the shipping advice is set to complete.

AVAILABI... INDICAT... RED	AVAILABI... INDICAT... ORANGE	AVAILABI... INDICAT... GREEN	AVAILABI... INDICAT... SHIPMENT	LAST SHIPMENT DATE	SHIPPING ADVICE
				28-1-2021	Partial
				28-1-2021	Complete

For information purposes, the screen also contains the requested and promised delivery date, the shipping address of the customer, the number of order lines, the number of shipment lines and the number of order lines. It also shows us the last shipment date. This is a flow field which will look up the latest shipment date in the related order lines for this sales order.

In the ribbon there is a function to quickly filter on orders where the Availability indicator shipment is green with a white truck:



The screen is also built to quickly print your warehouse report for sending the orders, but also functionality for booking your orders fast. You can select the order you want, if needed change the quantity to ship and/or the quantity to invoice and then you click post and print. There you can choose for: Ship, Invoice or Ship and invoice.