



INVENTORY AVAILABILITY INDICATORS

1.16.0.0

IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

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.
V1.16.0.0	Renamed to "Inventory Availability Indicators" Updated documentation Fixed a bug that caused the shown availability indicators to be based on the quantity of the previous version of a record (i.e., and only after a refresh show the up-to-date availability indicator) Only show an indicator for lines with inventoriable items Fixed the conditions for red/orange availability indicators Fixed indicators on assembly and transfer lines only being loaded after a page refresh (now they will be refreshed after leaving the record) Implemented option to start a subscription for the app

Introduction

The Inventory 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 maintaining inventory.

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

The Inventory Availability Indicators extension, provides you with insight in the available inventory by:

- ✓ Having direct insight in the availability of an item in your documents, not with a number, but with a meaningful color:
 - Green = sufficiently free inventory
 - Orange = no sufficiently free inventory, but enough replenishment is planned
 - Red = Call to action: no sufficiently free inventory nor sufficient replenishment planned yet
- ✓ Seeing directly from the sales line, whether the materials for the attached assembly order are in inventory
- ✓ Having a helicopter view of the order(line)s that can be shipped to your customers

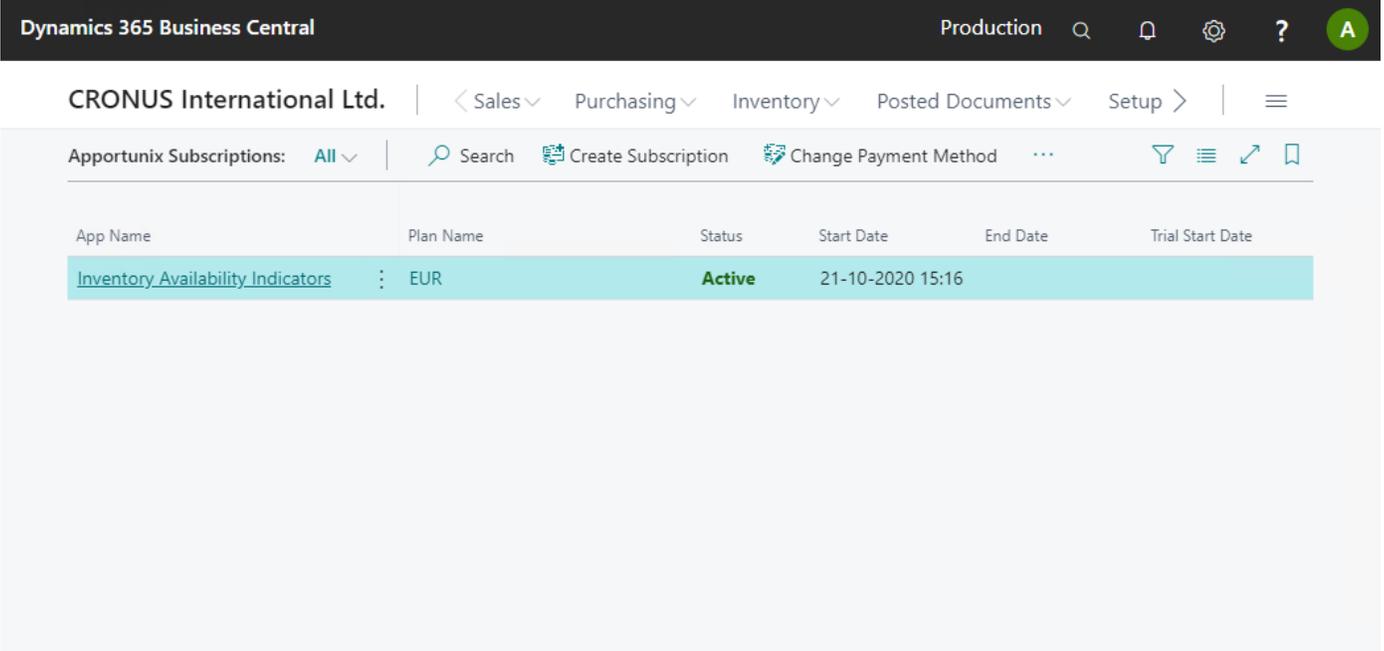
Inventory Availability Indicators functionality is integrated in the sales orders, transfer orders and assembly orders. The details of the functionality will be presented in the next chapters of this documentation.

Free to Try

This extension can be used for free, without limitations in one or more of your Dynamics 365 Business Central *Sandbox* environments. When you use the features that would require a subscription for use in one of your *Production* environments, a notification will be displayed that informs you that you are using such a feature.

To use all the features of the extension in a *Production* environment you can start a free trial subscription that will automatically change to a paid subscription after the trial ends. You can cancel your subscription at any time you like and will be able to use the features of the app until the current invoicing period ends.

To manage your subscriptions, you can use the *Apportunix Subscriptions* page. On this page you can start or cancel subscriptions for Apportunix apps and view or update the payment methods that are used for your subscriptions.



The screenshot displays the 'Apportunix Subscriptions' page within the Dynamics 365 Business Central interface. The page header includes 'Dynamics 365 Business Central' and 'Production'. The breadcrumb trail shows 'CRONUS International Ltd.' followed by navigation options for Sales, Purchasing, Inventory, Posted Documents, and Setup. The main content area features a table with the following columns: App Name, Plan Name, Status, Start Date, End Date, and Trial Start Date. A single subscription is listed with the app name 'Inventory Availability Indicators', a plan name of 'EUR', a status of 'Active', and a start date of '21-10-2020 15:16'. The table also includes search, create, and change payment method buttons.

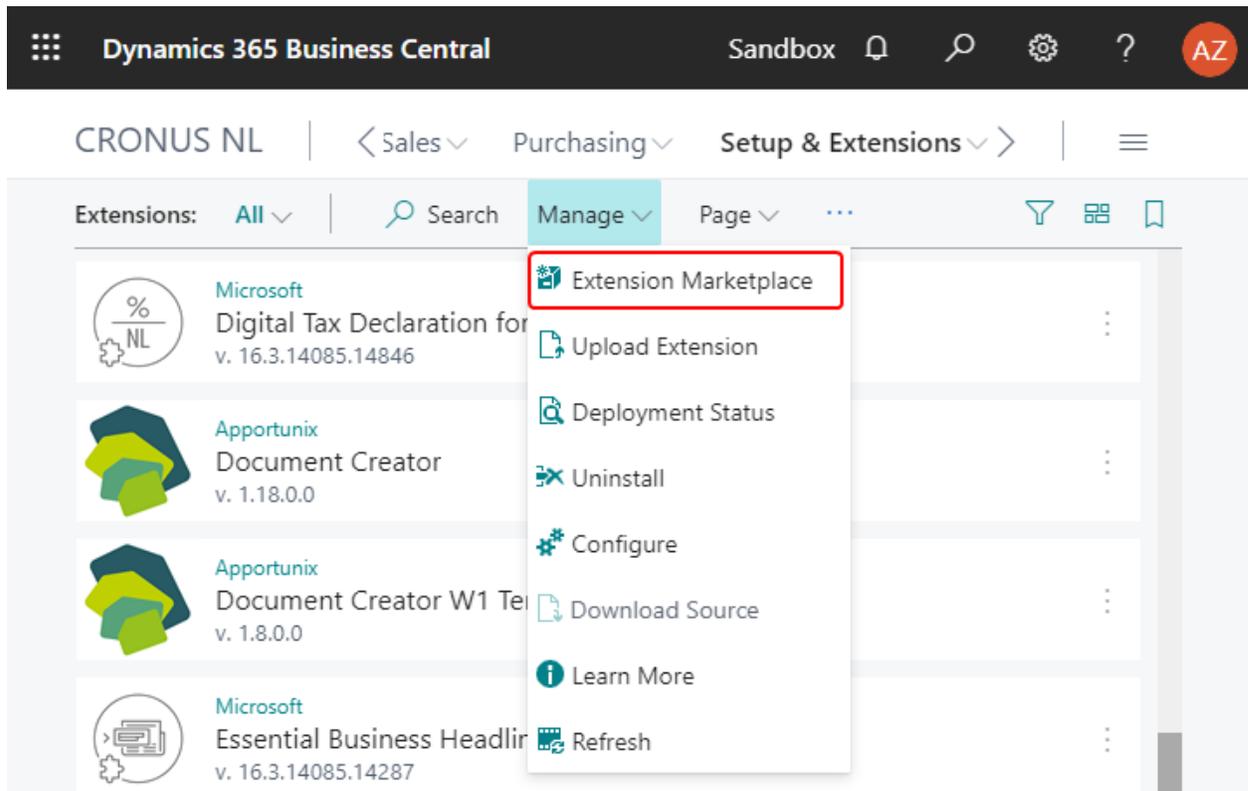
App Name	Plan Name	Status	Start Date	End Date	Trial Start Date
Inventory Availability Indicators	EUR	Active	21-10-2020 15:16		

Please note that your payments are handled safely, in a PCI-compliant manner, in cooperation with our payment provider [Stripe](#). For more information, please feel free to contact us by visiting the [Contact](#) page on our website.

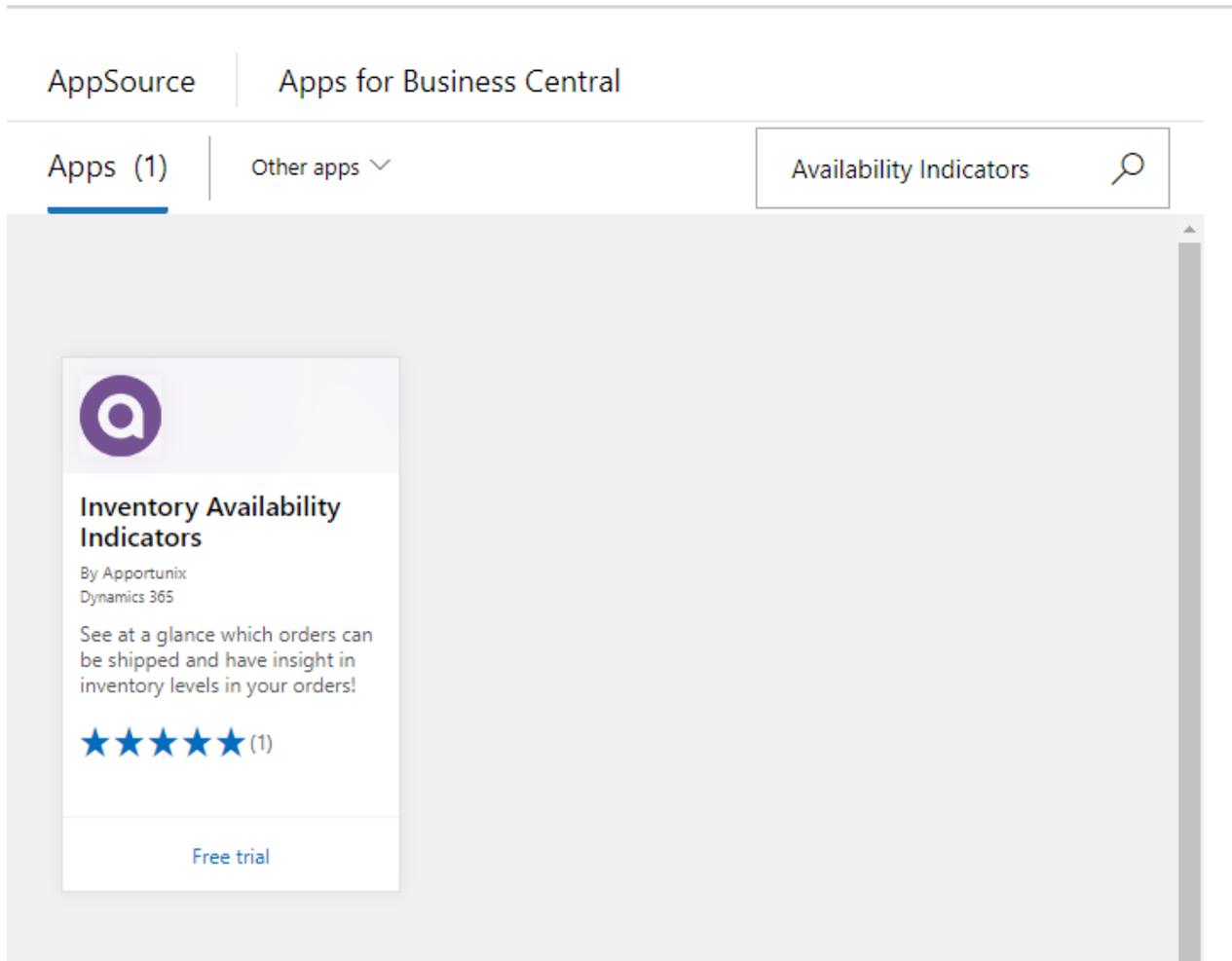
Installation

The Inventory 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 "Inventory Availability Indicators" (By Apportunix)



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

AppSource | Apps for Business Central

< Apps



Inventory Availability Indicators

Apporturnix

★★★★★ 5.0 (1)

Free trial

Overview [Reviews](#)

FREE TRIAL

Products
[Dynamics 365 Business Central](#)

Publisher
Apporturnix

Acquire Using
Work or school account

Version
1.16.0.0

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See at a glance which orders can be shipped and have insight in inventory levels in your orders!

"Do I have enough inventory available 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 inventory as low as possible, without affecting reliability of deliveries too much. One should be able to make quick and easy decisions on the following questions:

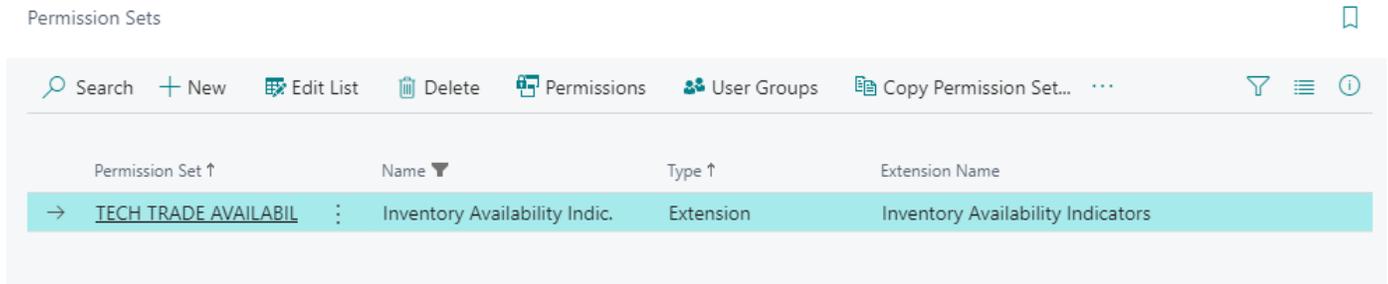
- Which shipping dates can I promise to my customer?
- Which orders can be shipped now?

This app provides the user with some powerful insights: in the order lines (sales, transfer, assembly) we have added a colored indicator which shows you whether an order line can be shipped. A green indicator means: "sufficient inventory to cover all of the current needs". An orange indicator means there is currently no inventory, 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

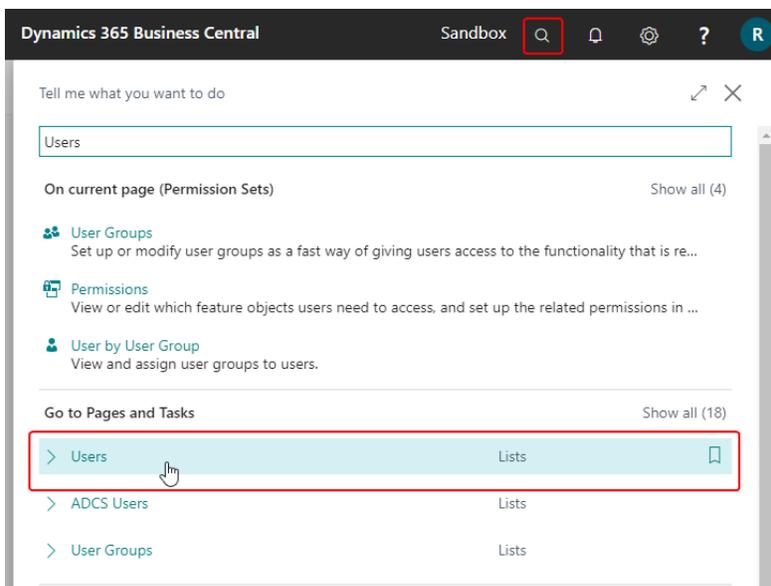
After the Inventory Availability Indicators extension has been installed, a permission set for the extension will have been added to your Business Central environment.



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

To assign the permission set to users:

1. Select the magnifying glass icon (*Tell Me*) on the top right corner of 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 the permission set for the Inventory Availability Indicators extension.

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

The Inventory Availability Indicators extension serves to quickly inform a Business Central user about the stock position of an item, which is achieved by adding colored tiles to pages in Business Central.

The extension includes the following tiles:

No. ↑	Picture
0	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

This extension adds these tiles that serve as availability indicators to the following documents:

- Sales Orders
- Transfer Orders
- Assembly Orders

The functionality is described for each of these documents in the sections that follow.

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	GEEEL	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

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

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

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	

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: 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	<input type="checkbox"/>	-	-	-	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	<input checked="" type="checkbox"/>	-	-	-	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 :
99001	BREDA, office desk pro	3	Orange square	-	-	-	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: 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 :
99001	BREDA, office desk pro	3	Red square	-	-	-	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: 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	
			+					
			+					
			+					

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

The Inventory Availability Indicators can help you to find out which orders could be shipped, and which orders cannot. For this purpose, we created the *Shipment Planning* page, which offers the ultimate overview for your warehouse and shipment planning.

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

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 ADVICE	NO. OF ORDER LINES	NO. OF SHIPPED LINES	NO. OF INVOICED LINES
1002	28-1-2021			28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1003	28-1-2021			28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1004	28-1-2021			28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1005	28-1-2021			28-1-2021	EXW	BLAUW	Open					28-1-2021	Partial	1	0	
1008	28-1-2021			28-1-2021	EXW	GEEL	Open					28-1-2021	Partial	1	0	
1010	28-1-2021			28-1-2021	EXW	GEEL	Open					28-1-2021	Partial	1	0	
101009	22-1-2021			22-1-2021	EXW	ROOD	Released					22-1-2021	Partial	2	2	
101011	15-1-2021			15-1-2021	EXW	ROOD	Released					15-1-2021	Partial	3	3	
101013	21-1-2021			21-1-2021	EXW	GEEL	Released					21-1-2021	Partial	3	3	
101015	24-1-2021			24-1-2021	EXW	GROEN	Released					24-1-2021	Partial	4	4	
101016	20-5-2019			20-5-2019	EXW	BLAUW	Open					20-5-2019	Partial	3	1	
101017	29-1-2021			29-1-2021	EXW	GEEL	Open					29-1-2021	Partial	3	0	
101018	29-1-2021			29-1-2021	EXW	GEEL	Open					29-1-2021	Partial	1	0	
101019	25-1-2021			25-1-2021	EXW	GEEL	Released					25-1-2021	Partial	9	9	
101020	29-1-2021			29-1-2021	EXW	GEEL	Open					29-1-2021	Partial	1	0	
101022	7-2-2021			7-2-2021	EXW	ROOD	Open					7-2-2021	Partial	2	0	
101023	24-2-2021			24-2-2021	EXW	BLAUW	Open					24-2-2021	Partial	2	0	
104001	20-1-2021			20-1-2021	EXW	BLAUW	Open					20-1-2021	Partial	1	0	
104002	20-1-2021			20-1-2021	EXW	BLAUW	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 page 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 a green or partly green indicator, the availability indicator green field will be filled with a green icon. If one of the order lines has a red or partly red availability indicator, the availability indicator in the header will be red etc.

This page also contains a subform 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 one of the following indicators:

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 indicates that you can probably ship a part of this order to your customer. When the shipping advice of the order is set to "Complete", all lines of the order must have the green indicator and/or the green with a BOM icon indicator.

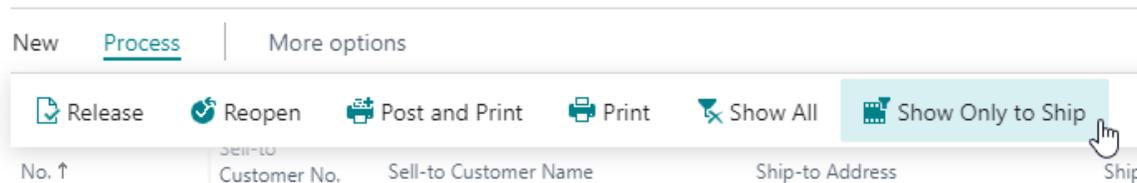
None/white icon: there is nothing to ship at the moment. For example, the lines have a red indicator, or the shipping advice is set to "Complete", and you do not have all the items available at the moment.

For examples, see the following screenshot. The order corresponding to the first line can be shipped partially, so the availability indicator for shipment is filled even though there is a red availability indicator in the order. The second line does not have the availability indicator for shipment, because the shipping advice for the order 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 shipment lines and the number of order lines. It also shows us the last shipment date, which is a flow-field that looks up the latest shipment date in the related order lines for this sales order.

In the ribbon there is a *Show Only to Ship* action to quickly filter on orders for which the availability indicator for shipment is "Green with a white truck" (i.e., show only the orders which could probably be shipped):



The screen is also built to quickly print your warehouse report for sending the orders, but also functionality for quickly posting your orders. You can select the order you would like to post, if needed change the quantity to ship and/or the quantity to invoice and then invoke the *Post and Print* action. Then, accordingly, you can choose to: Ship, Invoice or Ship and Invoice.