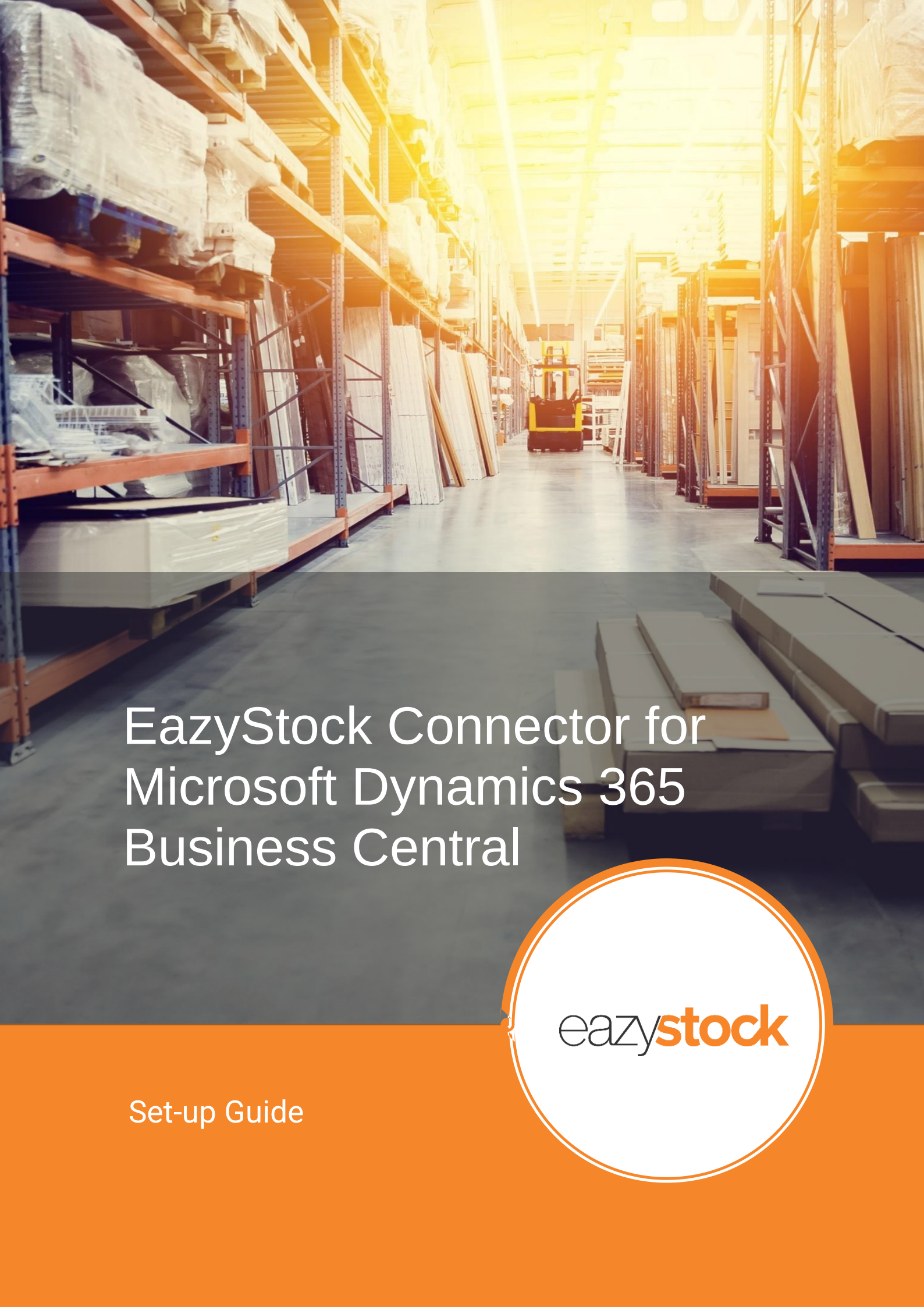




EasyStock Connector for Microsoft Dynamics 365 Business Central

Set-up Guide

eazystock

Set-up Guide - EazyStock Connector for Microsoft Dynamics 365 Business Central

Requirements for usage

To be able to use the EazyStock Connector (integration), your company needs to have the following in place:

1. Active License/Subscription of Microsoft Dynamics 365 Business Central Saas
2. Signed Subscription Agreement for the EazyStock Service. For more information, please reach out on appsource@EazyStock.com or fill out a form on our website <https://www.EazyStock.com/> and we will be in touch as soon as possible.

Version	Date	Created/adjusted by	Description
17.1.20210101.0	10-12-2020	MJ. Hennink	Final version Go Live App source.
17.1.20210803.0	08-03-2021	MJ. Hennink	First Update March Release
18.0.20210610.0	14-06-2021	M. Visser	First Update June Release
19.0.20220208.0	09-02-2022	M. Visser	First Update February Release
20.0.202204012.0	13-04-2022	M. Visser	First Update April Release
20.1.20220630.0	30-06-2022	M. Visser	Added API instructions and June Release

Set-Up Guide - EazyStock Integration

Based on Microsoft Dynamics 365 Business Central SaaS version.

Index

Set-up Guide - EazyStock Connector for Microsoft Dynamics 365 Business Central	4
Set-Up Guide - EazyStock Integration	5
Analysis	6
Setting up the Extension	7
EazyStock Setup in Microsoft Dynamics 365 Business Central SaaS	8
EazyStock Management Screen	26
EazyStock Manual Export	28
EazyStock Export Entries	29
EazyStock Import Entries	30
EazyStock Forecast Adjustments	31
EazyStock Item overrides	33
Business Central Pages extended with EazyStock Functionality	35

Analysis

During the analyses the specs will be used and delivered by the implementation partner:

- File specification item 19.1
- File specification Purchase Order 19.1
- File specification Transactional Demand 19.1
- File specification Forecast adjustment 19.1
- Bill of material file 19.1 (Applicable for Production or Assembly)
- File specification Item override 19.1

Setting up the Extension

Download the EazyStock Extension from Microsoft AppSource.

We don't develop anything that is customer specific in the extension so we can keep updating with new updates without any problems. Additional customizations can be requested if needed via Dynamics Business Central partner Or Synchron.

After installing the app, the app menu's can be found by searching for EazyStock:

Tell me what you want to do

↗

✕

eazystock

Go to Pages and Tasks

Show less (3)

>

EazyStock Setup

Administration

>

EazyStock Imports

Lists

>

EazyStock Management

Tasks

>

EazyStock Manual Export

Tasks

>

EazyStock Import Entries

Lists

>

EazyStock Item Overrides

Administration

>

EazyStock Export Entries

Lists

>

EazyStock Job Queue Export

Tasks

>

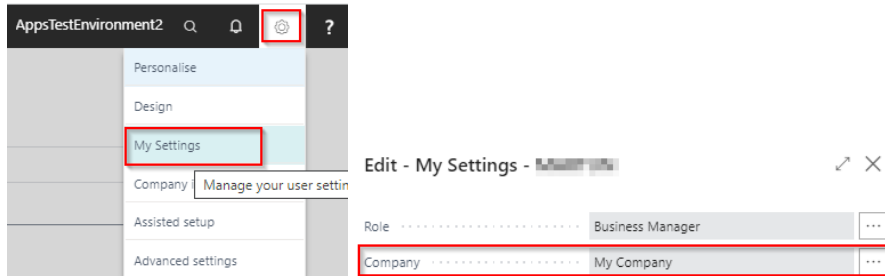
EazyStock Forecast Adjustments

Administration

EazyStock Setup in Microsoft Dynamics 365 Business Central SaaS

It is possible to create a separate setup per Company.

Go to My Settings and choose the correct Company



Go to EazyStock setup via search.

An explanation per tab will follow for the most important parts.

General Tab

The image shows a screenshot of the 'General' tab in the EazyStock setup. It contains several fields and toggle switches. The 'Warehousegroup code' field is set to 'SucceedIT'. The 'IF empty Vendor-Customer' field is also set to 'SucceedIT'. The 'Split Files Per Location' toggle is turned off. The 'Use Assembly' and 'Use Production' toggle switches are both turned on.

Warehouse group code Select the warehouse you want to use for the export. Important note this will only be used for the name exported to EazyStock.

IF empty Vendor-Customer If no Vendor and/or Customer is found, this value will be used in the export file(s).

Use Assembly Based on this checkmark, the Bill of Material (BOM) will be exported, the transactional demand will be supplemented with assembly lines and the Purchase order file will be supplemented with Assembly Headers information.

Use Production Based on this checkmark, the Bill of Material (BOM) will be exported, the transactional demand will be supplemented with consumption of materials and the Purchase order file will be supplemented with production order header information.

Split Files Per Location Based on this checkmark, When [Split File Job Queues](#) are correctly set the files will be split per Location. This functionality is only used in case internal distribution will affect the replenishment process.

Locations Tab

Via this menu you can choose which setup you use for each separate Location.

Locations		Manage									
Warehouse Code*		Location Filter Inventory		Location Filter Demand		Location Filter Supply		Use Variant Basic		Use Variant Advanced	
→	H00FD-	:	H00FD-IOOST	:	H00FD-IOOST	:	H00FD-IOOST	☒	☐	☐	☐
	WEST		WEST		WEST		WEST	☐	☒	☐	☒

Note 1: If you don't set a filter on any of the below Location Filters (Inventory, Demand or Supply) all the data of all the warehouses will be aggregated and send to EazyStock.

Note 2: All filters need to be setup in case multiple warehouses have been created.

Note 3: You cannot overlap Loc. filters as this will cause double values in EazyStock.

Warehouse Code Select the warehouse you want to use for the export. Important note this will only be used for the name exported to EazyStock.
Note: Without this record, the item file cannot be loaded.

Location Filter Inventory Here you can define based on which warehouses the current stock qty in the item file will be aggregated from.

Location Filter Demand Here you can define based on which warehouses the Transactional Demand data will be aggregated from.

Location Filter Supply Here you can define based on which warehouses the Supply/PO data will be aggregated from.

Use Variant Basic When this option is selected variants codes will be exported in the files as a prefix. The basic information for the variant item is exported from the main item card.

Use Variant Advanced When this option is selected variants codes will be exported in the files as a prefix. The basic information for the item is exported from the SKU card. Note SKU is needed per variant!

Export SKU Only Only SKU's will be exported. This is use when customers have Variants and don't want to export the base item.

GUI Tab

GUI	
Use New GUI	☒
Prefix Delimiter	

Use New GUI When this Boolean is ticked the variant code/prefix will be added to the main item number.

Prefix Delimiter Here you can enter the delimiter (1 character).

Note: Pipe | cannot be used as it will cause data to be moved in the file.

Item Export Tab

The screenshot shows the 'Item Export' configuration window. It includes sections for:

- File Name:** A text field for the export file name.
- Free Text item Fields:** Four text fields for adding custom text to the export.
- Backorder Calculation:** A toggle switch to enable or disable backorder calculations.
- Reserved Stock Calculation:** A toggle switch to enable or disable reserved stock calculations.
- Weight and Volume:** Fields for 'Net Weight' (kg), 'Volume' (cm3), and 'Description'.
- Item Group 1 & 2:** Two dropdown menus for selecting item groups.
- Order Limits:** Fields for 'Min_Qty', 'Max_Qty', and 'Min_Qty'.
- Prices:** A dropdown for 'Currency' (set to EUR) and a toggle for 'Use Purchase Price Table'.

File Name

File name that will be exported for this file (excluding date/time stamp.)

Free text item Fields

Over here a pre-defined text can be setup in the item export. Next to that, you can select the value representing the field number in the Item (table 27). So when a text is entered and a fields an example could be **Assembly Policy: Assemble-to-Stock** were "Assemble-to-Stock" is the field value. This value will be added to the free text fields in EazyStock.

Backorder Calculation

Used when backorder customization¹ is **not set** in EazyStock. Calculates back order QTY based on the date field selected in the field **Sales line date filter field Back Order & Reserved Stock**.

Reserved Stock Calculation

Used when reserved stock customization is **not set** in EazyStock. Calculates reserved stock QTY based on the date field selected in the field **Sales line date filter field Back Order & Reserved Stock**.

Sales line date filter field Back Order & Reserved Stock:

In this field you can set the data field on which the backorders and reserved stock are defined. For example, the shipment date when selected all **non-delivered** Quantities on Sales orders that are not delivered <=that day are send as backorders. All Quantities that are not delivered within the lead time of that item will be send as reserved stock

Weight Value to Use

Here you can set if you want to use the net weight or the gross weight from the item card.

Weight and Volume

If you want to use weights and Volume for the function order fill up in EazyStock, you can enter the correct value, which should match with the value entered for the item.

Item Group 1 & 2

Here you can map several Item fields, for which you can select the value representing the field number in the Item table 27 for example Item Category Code.

Order Limits

When **not** using **multiple warehouses option** you can map the Order Quantity fields from the item, for which you can select the value representing the field number in the Item table 27. Or

¹ **Customization** means only demand within Leadtime period are considered as backorder or reserved stock in EazyStock

	SKU, for which you can select the value representing the field number in the SKU table 5700.
Currency:	Currency which will be used in the EazyStock exports. When using the option Use Purchase Price Table , it is possible other currencies are exported.
Use Purchase Price Table	Based on this checkmark, the Purchase Price Table will be used to export the currency instead of the price and currency from the Item Card Table.
Image URL	In this field you can set a field from table 27 that contains a (web) link to the item picture of that item.
Lead Time Work Days	Used when working with workings days on the item card. (WD) When turned on the working days will be converted to days. Example if the value is 5WD the output will be 7 days. The formule is $WD \times 1,4$ and then rounded up.
Use Additional Lead Time	Determines if additional lead time is used for calculation of the total lead time presented in EazyStock. Can only be calendar days as "xxD"
Use Safety Lead Time	Determines if Safety lead time is used for calculation of the total lead time presented in EazyStock. Can only be calendar days as "xxD".
Default Lead Time	The default lead time to be used when the lead time on the Item Card, Stock Keeping Unit Card and Vendor Card is left empty.

Transactional Demand Export Tab

Transactional Demand Export

File Name	Transactional_Demand_Full_SucceedIT_		Date		Free Text	
Transactional Demand Full	☒		Sales Line Date Field		Sales Line	
Export From Date	1-1-2022		Field	10	Free Text TD 1 Field	
Export From Date Shipment	1-3-2022		If Empty	0	Free Text TD 2 Field	
Sales			Sales Shipment Line Date Field		Sales Shipment Line	
Status Export Sales Lines			Field	0	Free Text TD 3 Field	
Open	☒		If Empty	0	Free Text TD 4 Field	
Released	☒		Prod. Order Component Date Field			
Pending Approval	☒		Field	0		
Pending Prepayment	☒		If Empty	0		
Production	☒		Assembly Line Date Field			
Use BOM Explosion	☐		Field	0		
Status Export Prod. Lines			If Empty	0		
Planned	☒		Posted Assembly Line Date Field			
Firm-Planned	☒		Field	0		
Released	☒		If Empty	0		
Finished	☐					
Assembly						
Status Export Assembly Lines	All					

File Name File name that will be exported for this file (excluding date/time stamp.)

Export from date Works in combination with the option: **Transactional Demand Full**. This field can be setup for the moment of where the historical data should be exported. If left empty, all history will be exported. Note this can result in huge files.

Export from date Shipment In case orders are handled the same day, we need to make sure closed orders are shown as demand in EazyStock. Works in combination with the option: **Transactional Demand Full**. This field can be setup for the moment of where the history for posted sales shipments should be exported. If left empty, all history will be exported. Note this can result in huge files.

Transactional Demand Full Choose whether you use full or partial files to upload data. Partial: Only records of today. Full²: All historic records or depending on the setting: **Export from date**.

² The full file functionality means closing all open* order lines that were not included in the Full TD file. EazyStock closes an order line by setting demanded_quantity = delivered_qty. Order line removal is a special case of closing an open order line, which is executed only for lines that have delivered_qty = 0.
* open = having delivered_qty < demanded_qty

SALES

Status Export Sales Lines Here you can define which (open) Sales orders you want to export by status. (All open orders, only Released orders, orders pending for approval or orders pending for Prepayment).

PRODUCTION

Use Bom Explosion: **Only used when use production is activated.** When this setting is activated items on the sales and sales shipment lines that have a production bill of material, will be exploded in the transactional demand file. This means when there is a production order based on a sales order the data of these orders won't be exported. When there are production orders that are made for stock they will be exported. The advantage of this setting is that you don't have to wait for the overnight EazyStock load to order your components.

Status Export Prod. Lines: Here you can setup which production order transactions you want to export or not by setting the status. (Planned, Firm planned, Released and finished.)

ASSEMBLY

Status Export Assembly Lines Here you can define which assembly transactions you want to export by status. (All, Released, Finished, and Released & Finished) **(Only visible when use assembly is turned on)**

Date Filters Fields

Here you can specify the date fields for the transactional demands export.
For example shipment date or posting date.

Sales Line Date Fields	Here the date field from the Sales Line can be selected that should be exported in the Demand Date field in de Transactional demand File. In case the field is empty The field if empty can be set with an alternative field to fill the Demand Date Field in the Transactional Demand file.
Sales Shipment Line Date Fields	Here the date field from the Sales Shipment Line can be selected that should be exported in the Demand Date field in de Transactional demand File. In case the field is empty The field if empty can be set with an alternative field to fill the Demand Date Field in the Transactional Demand file.
Prod. Order Comp. Date Fields	Here the date field from the Prod. Order Comp. Line can be selected that should be exported in the Demand Date field in de Transactional demand File. In case the field is empty The field if empty can be set with an alternative field to fill the Demand Date Field in the Transactional Demand file.
Assembly line Date Fields	Here the date field from the Assembly Line can be selected that should be exported in the Demand Date field in de Transactional demand File. In case the field is empty The field if empty can be set with an alternative field to fill the Demand Date Field in the Transactional Demand file. (Only visible when use assembly is turned on)
Posted Assembly line Date Fields	Here the date field from the Posted Assembly Line can be selected that should be exported in the Demand Date field in de Transactional demand File. In case the field is empty The field if empty can be set with an alternative field to fill the Demand Date Field in the Transactional Demand file. (Only visible when use assembly is turned on).

Free text Fields

Sales line

Here you can select the fields from the sales line you want to export to the Free Text 1 & 2 Field in the EazyStock Demand Transactions.

Sales Shipment Line

Here you can select the fields from the sales shipment line you want to export to the Free Text 1 & 2 Field in the EazyStock Demand Transactions. **Important note:** These lines will eventually overwrite the sales line when the sales lines are posted. This means if you choose different fields for Free Text 1 & 2 between the sales and the sales shipment the sales shipment will be the final Free Text information exported.

Bill of Material Tab

Bill Of Material

File Name	Bill_of_Material_Full_SucceedIT_	BOM Location Code	HOOFD- ▼
-----------------	----------------------------------	-------------------------	-------------

This Tab is only visible when Assembly or Production is Turned on.

File Name

File name that will be exported for this file (excluding date/time stamp.)

BOM Location Code

Select the Warehouse of the Bill of Material exports.

Purchase Order Tab

Purchase Order		
File Name	Purchase_Order_Full_SucceedIT_	Date
Status Export Purchase Lines	All	Purchase Line Requested Date Field
Use Dynamic Lead Time	☒	Field
Receipt Date Type	Last	If Empty
Use Transfer	☒	Purchase Line Received Date Field
Status Export Transfer Line		Field
Order Date Used For Purchase Ord...	Purchase Order Header	If Empty
		Purchase Receipt Requested Date Field
		Field
		If Empty
		Purchase Receipt Received Date Field
		Field
		If Empty
		Assembly Requested Date Field
		Field
		If Empty
		Free Text
		Purchase Line
		Free Text Supply 1 Field
		Free Text Supply 2 Field
		Purchase Receipt Line
		Free Text Supply 3 Field
		Free Text Supply 4 Field

File Name

File name that will be exported for this file (excluding date/time stamp.)

Status Export Purchase lines

Here you can define which Purchase Orders you want to export by status (All or Released).

Use Dynamic Lead Time

Comparing the receipt data from the (posted) Purchase Order Lines versus the "receipt" order lines for optimum lead time calculation. Only used in EazyStock Premium & Global planner version.

Receipt Date Type

Only used for dynamic lead time mode. Here you can choose 2 options that will setup which date of a receipt from a purchase order will be taken. (only needed when having multiple receipts for one purchase order.)

First: BC will take the posting date of the first receipt.

Last: BC will take the posting date of the last Receipt.

Use Transfer

Used for making transfer orders. When activated Transfer Orders will be exported in the Purchase order file to EazyStock. When using Global Planner version Redistribution Orders from EazyStock will be imported as Transfer orders in BC.

Status Export Transfer Lines

Here you can define which Transfer orders you want to export (All (select nothing), open or Released).

Order date used for PO Export

Option to select where to take the order date from. (Purchase order header or per purchase order line)

Date Filter Fields

Purchase Line Req. Date Field	Here the date field from the Purchase line can be selected that should be exported in the Requested Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Requested Date Field in the Purchase order File.
Purchase Line Rec. Date Field	Here the date field from the Purchase line can be selected that should be exported in the Received Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Received Date Field in the Purchase order File.
Purchase Rec. Req. Date Field	Only used when Dynamic lead time is turned on. Here the date field from the Purchase receipt line can be selected that should be exported in the Requested Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Requested Date Field in the Purchase order File.
Purchase Rec. Rec. Date Field	Only used when Dynamic lead time is turned on. Here the date field from the Purchase receipt line can be selected that should be exported in the Received Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Received Date Field in the Purchase order File.
Assembly Req. Date Field	Only used when Assembly is turned on. Here the date field from the Assembly header can be selected that should be exported in the Requested Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Requested Date Field in the Purchase order File.
Assembly Rec. Date Field	Only used when Assembly is turned on. Here the date field from the Assembly header can be selected that should be exported in the Received Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Received Date Field in the Purchase order File.
Production Req. Date Field	Only used when Production is turned on. Here the date field from the Production header can be selected that should be exported in the Requested Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Requested Date Field in the Purchase order File.

Production Rec. Date Field	Only used when Production is turned on. Here the date field from the Production header can be selected that should be exported in the Received Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Received Date Field in the Purchase order File.
Transfer Line Req. Date Field	Only used when use Transfer is turned on. Here the date field from the Transfer Line can be selected that should be exported in the Requested Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Requested Date Field in the Purchase order File.
Transfer Line Rec. Date Field	Only used when Use Transfer is turned on. Here the date field from the Transfer Line can be selected that should be exported in the Received Date field in the Purchase order File. In case the field is empty the field "If Empty" can be set with an alternative field to fill the Received Date Field in the Purchase order File.

Free text Fields

Purchase Line:

Here you can select the fields from the Purchase line you want to export to the Free Text 1 & 2 Field in the EazyStock Placed orders and stock due information.

Purchase Receipt Line:

Here you can select the fields from the sales receipt line you want to export to the Free Text 1 & 2 Field in the EazyStock Placed orders and stock due information.

Important note: These lines will eventually overwrite the purchase line when the purchase lines are posted. This means if you choose different fields for Free Text 1 & 2 between the purchase and the purchase receipt, the purchase receipt will be the final Free Text information exported.

Forecast Adjustment Export Tab

This Tab has an extra functionality comparing with the others which we described below.

The screenshot shows the 'Forecast Adjustment Export' tab interface. It includes a 'File Name' field with the value 'Forecast_Adjustment_Full_EazyStock_', a 'Forecast Partial' checkbox, and a 'Production Forecast' section with a 'Forecast Adjustment Type' dropdown set to 'RES'. There are also checkboxes for 'Use Forecast Adjust. Trans.', 'Use Forecast Adjust. Manual', 'Use THT', 'Use Production Forecast', 'Assembly BOM Explosion', and 'Production BOM Explosion'.

File Name:	File name that will be exported for this file (excluding date/time stamp.)
Use Forecast Adjust.Trans.:	Based on this checkmark, the Forecast Adjustment file with future reservations will be exported.
Important! Don't use when reserved stock customization of synchron is <u>NOT</u> used. (Please ask partner for more information)	
Status Export Forecast Adjust.:	Here you can define which Future sales orders you want to export by status. (All or Released)
Forecast Adjustment Period:	Only Used when Use Forecast Adjust Trans is activated. Month or Week should be set dependent on setup in EazyStock.
Forecast Partial:	Used when using 2 companies that export data to EazyStock. In one of the companies it should be partial. This to prevent 2 Full files overwriting eachother.
Use Forecast Adjust. Manual:	With this function you can add manuel forecast adjustment from BC to EazyStock. <i>(These can be entered in BC here: Departments/EazyStock Base Application/EazyStock Forecast Adjustments.)</i>
Use THT:	Choose whether you need EazyStock to automatically reserve stock which expires in this period.
Use Production Forecast:	Based on this checkmark the Demand forecast entered in the Demand Forecast Matrix will be added to the Forecast Adjustment file.
Forecast Adjustment Type:	Only used when Use Production Forecast is activated. Here you can set the type of the adjustment, Override (OVER), Reservation (RES) or Addition (ADD) for the exported Demand Forecast Matrix lines
Assembly BOM Explosion:	This function adds the Ass. BOM components to the forecast adjustment file. <i>Can only be used if General: Use Assembly Boolean is ticked.</i>
Production BOM Explosion:	This function adds the Prod. BOM components to the forecast adjustment file. <i>Can only be used if General: Use Production Boolean is ticked.</i>

Item Override Tab

Item Override	
File Name	item_override_partial_succeedIT_
Use Item Override	☐
Item Override Partial	☐
File Name	File name that will be exported for this file (excluding date/time stamp.)
Use Item Override	If checked BC will activate the export of the Item Override file You can add overrides in BC for EazyStock on the EazyStock Item Override page.
Item Override Partial	Sets item override file to partial. Used to work in combination with the field Eazystock Stocked on the item/SKU card.

Import Tab

Import	
Purchase	Transfer
PO Import Process	Transfer Line Due Date Field
Release Purchase Order	Assembly
Assigned User ID Purchase Order	Release Assembly Order
Purchase Line Due Date Field	Assembly Due Date Field
Use Purchase UOM	Production
Blanket Order	PO Status Import
Blanket Order Process	Production Due Date Field

PO import Process:

BLANC	No import applicable.
<i>Add Purchase Order</i>	Every file contains 1 or more items for 1 Vendor and will be added to the last open Purchase order of the Vendor.
<i>New Purchase Order Per Item</i>	Every file contains 1 or more items and/or vendors.
<i>New Purchase Order Per Vendor</i>	Every file contains 1 or more items and/or Vendors and will lead to 1 Purchase Order per Vendor containing all the items of the file related to that Vendor.
<i>Add Requisition Worksheet</i>	Every file contains 1 or more items and/or Vendors and will lead to Requisition Lines to be processed to Purchase, Assembly or Production Order by NAV.
<i>Add Purchase Quote</i>	Every file contains 1 or more items for 1 vendor and will be added to the last open Purchase order of the Vendor.

<i>New Purchase Quote Per Item</i>	Every file contains 1 or more items and/or Vendors.
<i>New Purchase Quote Per Vendor</i>	Every file contains 1 or more items and/or Vendors and will lead to 1 Quote per Vendor containing all the items of the file related to that Vendor.
Release Purchase Order	Purchase Order will automatically be released after being generated.
Assigned User-ID for Import	Gives the possibility to set a user that will be assigned on the Purchase order that's imported from EazyStock. Is left empty the user that sets the Job Que entry for import will be assigned.
Purchase line due date field	In this field you can choose the date field were the due date from the recommended order export from EazyStock should be imported on the purchase line.
Use Purchase UOM	Used when the Purchase UOM from the Item Card should be used instead of the Base Unit of Measure. The Qty send from EazyStock will be transferred to the Purchase UOM on the Purchase Line added
Blanked Order	Used to deduct QTY's from blanket orders when an order is imported from EazyStock. See Blanket Order Process for the multiple options of creating purchase orders from purchase blanket orders.
Blanket order Process	(Multiple options)
<i>Purchase order per item</i>	A purchase order will be made from the Blanket Order for the specific item. This means when there are more items exported from EazyStock and their present in the same Blanket order, multiple purchase orders are made. Important note: If the total quantity send from EazyStock for an item is higher than the qty on the blanket order for that item, an additional order will be made based on the setting in the field: PO import Process
<i>Purchase Order per item including additional Qty.</i>	A purchase order will be made from the Blanket for a specific item. This means when there are more items exported from EazyStock and their present in the same Blanket Order, multiple purchase orders are made. Additional: If the total qty send from EazyStock for an item is higher than the qty on the blanket order for that

	item, an additional line will be added in the same purchase order.
<i>Purchase Order per Blanket Order</i>	A purchase order will be made from the Blanket for all the items exported from EazyStock and present in the Blanket order. Important note: If the total quantity send from EazyStock for an item is higher than the qty on the blanket order for that item, an additional order will be made based on the setting in the field: PO import Process
<i>Purchase order per Blanket Order including additional Qty.</i>	A purchase order will be made from the Blanket for a specific item. This means when there are they're more items exported from EazyStock and present in the same Blanket Order, multiple purchase orders are made. Additional: If the total qty send from EazyStock for an item is higher than the qty on the blanket order for that item, an additional line will be added in the same purchase order.
Transfer Line Due Date Field:	In this field you can choose the date field were the due date from the recommended order export from EazyStock should be imported on the transfer line.
Release Assembly Order:	Assembly Order will automatically be release after being generated.
Assembly Due Date Field:	In this field you can choose the date field were the due date from the recommended order export from EazyStock should be imported on the Assembly line.
PO Status Import	Used for Production orders. Define which status a production orders imported from EazyStock should have.
Production Due Date Field:	In this field you can choose the date field were the due date from the recommended order export from EazyStock should be imported on the Production order header.

Webservices Tab & Webservices Settings

Webservice	
Host URL Token	https://api.eazystock.com/v1/token
Host URL Get File List	https://api.eazystock.com/v1/getfilelist
Host URL Upload File	https://api.eazystock.com/v1/uploadfile
Host URL PreSigned URL	https://api.eazystock.com/v1/pre-signed-url
Client ID Loaded	☒
Client Secret Loaded	☒
Tenant ID Loaded	☒
Product ID Loaded	☒

The required codes can be retrieved via Synchron after customer Creation in EazyStock.

Requested code are encrypted. Therefore you need to follow below instructions [“Eazystock Manual Setting op API Connection in Eazystock BC Connector”](#) to make sure correct URL's can be set.

Host URL Token:	The webservice URL to retrieve the security token to use in the webservice calls.
Host URL Token Get File List:	The webservice URL to retrieve the file list for the order files that needs to be imported into BC which were created in EazyStock.
Host URL Token Upload File:	The webservice URL to use to upload the exported files not larger then 4MB from BC to EazyStock
Host URL PreSigned URL:	The webservice URL to use to get the PreSigned URL to exported files larger then 4MB from BC to EazyStock.
Client ID Loaded:	Defines if the Client ID is loaded.
Client Secret Loaded:	Defines if the Client Secret is loaded
Tenant ID Loaded	Defines if the Tenant ID is loaded
Product ID Loaded	Defines if the Product ID is loaded

Setup User Account Menu

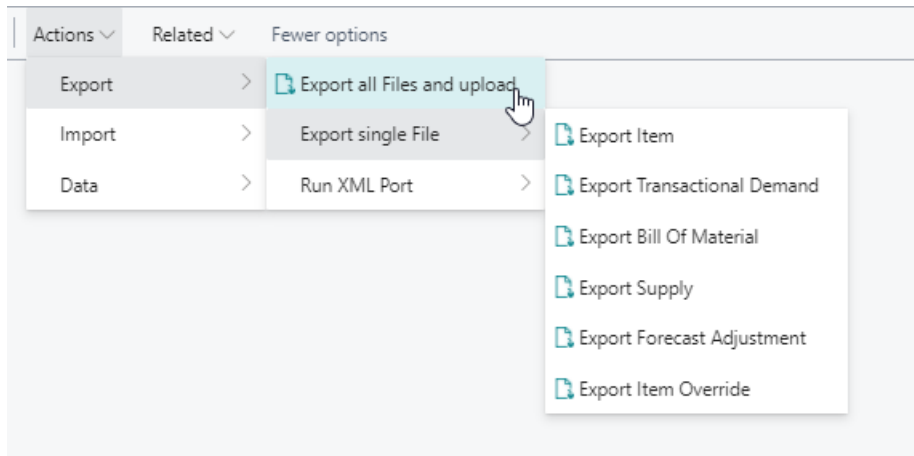
Client ID	Client ID
Client Secret	Client Secret
Tenant ID	Tenant ID
Product ID	Product ID

Client ID:	ID delivered by Synchron for connection with the webservice.
Client Secret Loaded:	Secret delivered by Synchron for connection with the webservice.
Tenant ID Loaded	ID delivered by Synchron for connection with the webservice.
Product ID Loaded	ID delivered by Synchron for connection with the webservice.

Important! Please save your current Setup before updating your connector. Because it's now possible to Connect each different entity to another webservice address, the setup will be BLANC after installing the app. (Please ask partner for more information)

EazyStock Management Screen

Export

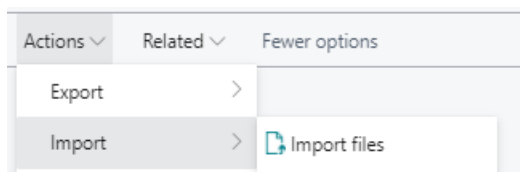


Export All Files and upload: All “files” will be uploaded to EazyStock by the webservice

Export Single File: Filetype selected will be uploaded to EazyStock via the webservice.

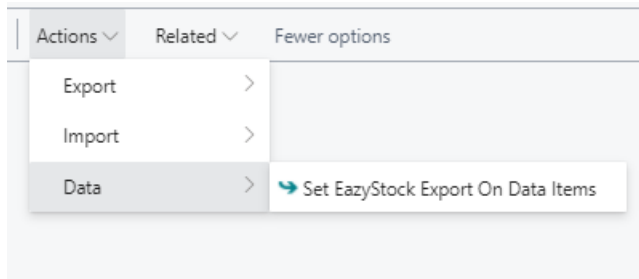
Run XML port: Filetype selected will be available to download via the browser. This option is used for testing purposes.

Import



Import Files: Imports files that are exported from EazyStock into the EazyStock import table. (Manual function)

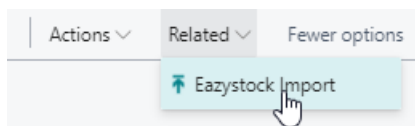
Data



Set EazyStock Export on Data Items:

Function that can be used at the start of an implementation. When running the Boolean field **Export to EazyStock** on all items will be ticked.

EazyStock import and import table



EazyStock import:

Opens the import record table of the Connector.

EazyStock Imports

Search + New Edit List Delete Page							
Warehouse Code	Supplier Code	Item Code	Variant Code	Confirmed OQ	Due Date	Replenishment	
→				0.00		Purchase	

Table information

Warehouse Code:

Warehouse code Exported from EazyStock.

Supplier Code:

Supplier code Exported from EazyStock.

Item Code:

Item code Exported from EazyStock.

Variant Code:

Variant code (Prefix) Exported from EazyStock.

Confirmed order QTY

Confirmed order Quantity Exported from EazyStock.

Due Date:

Due Date Exported from EazyStock.

Replenishment

Replenishment type exported from EazyStock: Purchase, Prod. Order, Assembly or Transfer. Used for defining type of order that should be created.

EazyStock Manual Export

Go to EazyStock Manual Export via Search

TELL ME WHAT YOU WANT TO DO



Eazy

Go to Pages and Tasks

Show all (10)

> EazyStock Setup

Administration

> EazyStock Management

Tasks

> EazyStock Manual Export

Tasks



Select the timestamp you want to have for the file.

Manual Export

Start Date

5-12-2020

End Date

5-12-2020

Advanced

Schedule...

OK

Cancel

Files will be exported with the End Date in the filename. This option can be used when files have not been delivered the day before. When not using the full file function the start date is used to define the date of the partial data. Or to set a date range.

EazyStock Export Entries

EazyStock Export Entries: All Search Page Actions Fewer options							
Entry No. 4	Export Type	Export Date	Export Time	Export File Name	Export Status	Export Error Message	
54	Item Override	5-12-2020	21:28:43	Item_Override_Full_LEENDERS_20201205T2128.txt	Processed		
53	Forecast Adjustment	5-12-2020	21:28:42	Forecast_Adjustment_Full_LEENDERS_20201205T2128.txt	Processed		
52	Supply	5-12-2020	21:28:28	Purchase_Order_Full_LEENDERS_20201205T2128.txt	Processed		
51	Bill Of Material	5-12-2020	21:28:26	Bill_of_Material_Full_LEENDERS_20201205T2128.txt	Processed		
50	Transactional Demand	5-12-2020	21:21:13	Transactional_Demand_Full_LEENDERS_20201205T2121.txt	Processed		
49	Item	5-12-2020	21:20:30	Item_Full_LEENDERS_20201205T2120.txt	Processed		
48	Item Override	4-12-2020	21:20:28	Item_Override_Full_LEENDERS_20201204T2120.txt	Processed		
47	Forecast Adjustment	4-12-2020	21:20:26	Forecast_Adjustment_Full_LEENDERS_20201204T2120.txt	Processed		
46	Supply	4-12-2020	21:20:05	Purchase_Order_Full_LEENDERS_20201204T2120.txt	Processed		

Action pane

Open export File:

Download the file that was exported via the browser.
(Used for checking purposes)

Table information

Entry No.

Number of record entry.

Export Type:

Type of the file exported.

Export Date:

Date of export.

Export Time:

Time of export.

Export File Name:

File name of the export (With exact date/time stamp)

Export Status:

Status of export: Processed, open or error.

Export Error message:

Displays an error message when there is an error with the export.

EazyStock Import Entries

EazyStock Import Entries: All Search Page Actions Fewer options

Opening Import File

Entry No. ↓	Import Date	Import Time	Import File Name	Import Status	Import Error Message
45	1-12-2020	12:55:31	eazystock-test-eazystock-ZVO1gy/VE1ujQQ0PDYljZ/Orders_SucceedIT_20201201T1155.xml	Processed	
44	1-12-2020	12:52:59	eazystock-test-eazystock-ZVO1gy/VE1ujQQ0PDYljZ/Orders_SucceedIT_20201201T1152.xml	Processed	
43	1-12-2020	12:49:59	eazystock-test-eazystock-ZVO1gy/VE1ujQQ0PDYljZ/Orders_SucceedIT_20201201T1149.xml	Processed	
42	1-12-2020	12:22:54	eazystock-test-eazystock-ZVO1gy/VE1ujQQ0PDYljZ/Orders_SucceedIT_20201201T1122.xml	Processed	
41	1-12-2020	12:16:22	eazystock-test-eazystock-ZVO1gy/VE1ujQQ0PDYljZ/Orders_SucceedIT_20201201T1116.xml	Processed	
40	1-12-2020	12:10:12	eazystock-test-eazystock-ZVO1gy/VE1ujQQ0PDYljZ/Orders_SucceedIT_20201201T0839.xml	Processed	

Action pane

Open Import File

Download the file that was Imported via the browser.
(Used for checking purposes)

Process Import

Processed the records from the EazyStock import table into orders in BC. (Note used when there is an error and the problem is fixed to push the order again. The errors will disappear.)

Table information

Entry No.

Number of record entry.

Import Date:

Date of Import.

Import Time:

Time of Import.

Import File Name:

File name of the Import (With exact date/time stamp)

Import Status:

Status of Import: Processed, open or error.

Import Error message:

Displays an error message when there is an error with the Import.

EazyStock Forecast Adjustments

EazyStock Forecast Adjustments:

All

Search

New

Delete

Edit List

Page

Record ID ↑		Warehouse Code	Item No.	Variant Code	Item Description	Year	Week/Month	Forecast Adjustment Type	Adjustment Value Type	Adjustment	Comment
1	⋮	HOOFD-	1925-W		Vergaderpakket 1-6	2020	11	ADD	PERCENT	20,00	Marketing ACTION
2		HOOFD-	20001		ATHENE Mobiel onderstel	2020	12	ADD	PERCENT	10,00	TEST ADDItion

In this table you can set forecast adjustments which will be exported to EazyStock.

Table Fields

Record ID:	ID of the record
Warehouse Code:	Warehouse code of choice for this override
Item No.:	Item number of choice.
Variant Code:	Variant Code of choice. (Prefix in EazyStock)
Item Description:	Informational field showing the item description from the item/variant card.
Year:	The year for the adjustment. (e.g. 2020)
Period:	The week number or month number for the adjustment. Important note: Should be the same as EazyStock configuration. When EazyStock is set in month use 1-12 and when EazyStock is set in weeks use 1-52
Forecast Adjustment Type:	The Code representing the type of the adjustment, Override, Reservation or Addition: ‘OVER’ – Overrides(single), replaces the system forecast and must be non-negative. ‘ADD’ – Additions(multiple) are added to the system forecast and can be negative. ‘RES’ – Reservations(multiple), the sum of the reservations is used as a minimum forecast. If the system forecast is lower than sum of all Reservations then the sum of all Reservations replaces the system forecast, must be positive.

Adjustment value type:

The Code representing the type of Adjustment value type which defines if the Addition Adjustment is expressed in percent or as a quantity. This functionality is only supported by the Addition ('ADD') Forecast adjustment type, other types have to be of the ABS, absolute quantity, type.

'ABS' – The Adjustment is expressed absolute value, in quantity, e.g. 1 or -5.

'PERCENT' – The Adjustment expresses a percentage of the system forecast for the specific period which is then used as an Addition adjustment. It can be positive or negative and the result of the addition is reevaluated when a new forecast is calculated by the system.

Adjustment:

The adjustment value. **Note:** If Forecast adjustment type is 'ADD' and Adjustment value type is 'PERCENT' then Valid Percent format If Forecast adjustment type is 'ADD' and Adjustment value type is 'ABS' then Valid Dec(N12.2) format else valid Dec(N12.2) format where Adjustment ≥ 0

Comment

Free text field for informational purposes.

EazyStock Item overrides

EazyStock Item Overrides ✓ Saved 🔍 📄 🔗

🔍 Search + New 🔧 Edit List 🗑️ Delete 📄 Page 🔍 ☰

Record ID ↑	Item Code	Warehouse Code	Override Code	Override Value	Logic	Duration	Start Date	End Date	Until Demand	Comment	Forecast Coverage Base
→ 1	1925-W	HOOFD-	STOCKED	Y	REPLACE				0	MJ TEST OVERRIDE	
2	1004	HOOFD-	BUFFER_STOCK	5	MINIMUM	TIME	9-9-2020	30-11-2020	0	Blavk Friday	

Table Fields

Record ID:	ID of the record
Warehouse Code:	Warehouse code of choice for this override
Item No.:	Item number of choice.
Variant Code:	Variant Code of choice. (Prefix in EazyStock)
Item Description:	Informational field showing the item description from the item/variant card.
Override Code:	Code to uniquely identify the Override type sent on the row. See the Documentation: File Specification Item Override 19.1
Override Value:	Dependent on the Override code, see the Override details information table in the Documentation: File Specification Item Override 19.1
Logic:	States how the override is affecting the target attribute, only applicable to some overrides, see the Override details in the Documentation: File Specification Item Override 19.1
Duration:	States how long the override is affecting the target attribute, only applicable to some overrides, see the Override details in the Documentation: File Specification Item Override 19.1
Start Date:	Applicable and mandatory when Duration = TIME or RECUR_TIME else ignored. States when the override starts affecting the target attribute.
End Date:	Applicable and mandatory when Duration = TIME or RECUR_TIME else ignored. States when the override starts affecting the target attribute.

Until Demand:	Applicable and mandatory when Duration = DEM else ignored. When DEM is used the override is removed when a change a demand is noted. By default, the demand is compared to the demand at the point when the override was set but with this field it can be set differently, e.g. higher so that more than one demand is required to qualify as a change.
Comment:	Free text field for informational purposes.
Forecast coverage base:	States what type of demand forecast is used to express coverage for given number of days. Used by: Buffer stock override and Logic = MAXIMUM or MINIMUM. Order level override and Logic = ADDITION.

Business Central Pages extended with EazyStock Functionality

Item Card

Inventory tab

1928-S · AMSTERDAM Lamp

ProcessItemPrices & DiscountsRequest ApprovalActionsRelatedFewer options

HistoryItemAvailabilityPurchasesSalesBill of MaterialsWarehouseServiceResources

InventoryShow less

Shelf No.

Created From Catalog Item

☐

Search Description

AMSTERDAM LAMP

Inventory

-2.237

...

Qty. on Purch. Order

10

Qty. on Prod. Order

0

Qty. on Component Lines

0

Qty. on Sales Order

0

Qty. on Service Order

0

Qty. on Job Order

0

Qty. on Assembly Order

0

Qty. on Asm. Component

0

Stockout Warning

Default (Yes)

▼

Prevent Negative Inventory

Default (No)

▼

Net Weight

3.5

Gross Weight

4.03

Unit Volume

0.03

Over-Receipt Code

▼

Export To Eazystock

☒

EazyStock Stocked

▼

Export to EazyStock

When checked the item will be exported in the Item export file to EazyStock.

EazyStock Stocked

With this setting you can override the EazyStock Stocked or Non Stocked setting. Leave empty if you want to follow the EazyStock inventory policy Matrix.

Items Unit of Measure

Item Units of Measure					
		Search	New	Edit List	Delete
		Page			
Code ↑		EAZY Bulk Qty 1	EAZY Bulk Qty 2	Qty. per Unit of Measure	
→ DOOS		☒	☐	15	
PALLET		☐	☒	400	
STUKS		☐	☐	1	

EazyStock Bulk Quantity 1&2

When checked the value in the Qty. per Unit of Measure field will be exported. **Important note: Bulk Order Quantity 1 > 0, Bulk Order Quantity 1 < Bulk Order Quantity 2, Bulk Order Quantity 1 < Maximum Order Quantity, Bulk Order Quantity 1 > Multiple Order Quantity and IF Bulk Order Quantity 2 is set Bulk Order Quantity 1 has to be set.**

Item Substitution entry Table

Item Substitution Entry							
		Search	New	Edit List	Delete	Condition	Page
		More options					
Variant Code ↑	Substitute Type ↑	Substitute No. ↑	Description	Interchangeable	Condition	Inherit Stock	
→	Item	20001	ATHENE Mobiel onderstel	☐	☐	☒	

In this table you can set the replacing item which activates the EazyStock replacements functionality.

Inherit Stock

Defines if stock can be inherited from the Replaced to the Replacing Items. 'Y': Yes, stock can be inherited. 'N': No, stock cannot be inherited.

Automatic job queue exports in BC

Regular Job queue

To be able to have BC automatically run a script, we need add a Job Queue Entry.

Go to Administration/Application setup/Job Queue or use the search button.

- Go to Job Queue Entries and add a new one:
 - Select the particular Codeunit EazyStock Export (70470528)
 - Select the desired Import time and first start date.
 - Select the desired Import days.
 - Set Status to Ready.

General				Show less	
Object Type to Run	Codeunit	Job Queue Category Code		Last Ready State	27-11-2020 16:14
Object ID to Run	70470528	User ID	DEMO	Earliest Start Date/Time	6-12-2020 21:00
Object Caption to Run		Maximum No. of Attempts to Run	0	Expiration Date/Time	
Description	EAZY Export	Rerun Delay (sec)	0	Status	Ready
Parameter String					

Recurrence			
Recurring Job	☒	No. of Minutes between Runs	0
Run on Mondays	☒	Inactivity Timeout Period	5
Run on Tuesdays	☒		
Run on Wednesdays	☒	Next Run Date Formula	
Run on Thursdays	☒	Starting Time	21:00:00
Run on Fridays	☒	Ending Time	
Run on Saturdays	☒		
Run on Sundays	☒		

Split file Job Queue

In case **Split Files Per Location** is used, a report should be used to setup the Job Queue. In case of internal distribution it could be the case multiple Job Queue's with different setup will need to be created. This depends on time needed to create the files.

Go to Administration/Application setup/Job Queue or use the search button.

- Go to Job Queue Entries and add a new one:
 - Select the particular Report EazyStock Job Queue Export (70470526)
 - Select the desired Import time and first start date.
 - Select the desired Import days.
 - Select Report Request Page options.

The screenshot shows the 'General' and 'Recurrence' tabs of the Job Queue Entry setup form. In the 'General' tab, the 'Object Type to Run' is set to 'Report' (1), and the 'Object ID to Run' is '70470526'. The 'Report Caption to Run' and 'Description' are both 'EazyStock Job Queue Export'. In the 'Report Parameters' section, 'Report Request Page Options' is checked (4). In the 'Recurrence' tab, 'Run on Mondays' through 'Run on Fridays' are checked (3). The 'Starting Time' is set to '00:00:00' (2). The 'Status' is set to 'On Hold'.

In the pop-up screen you have the option to split the basic files.

- Select the particular files you want to split per warehouse.
- Select additional required files.
- Select Item filter to add another condition for an item to be exported.
- Select Item flow filter "filter totals by" to export e.g. only items from a particular group.
- Select Warehouse in the filter and add the locations which should be splitted in this filter. User pipe ("|") as a separator. This filter is connected to the Locations setting in the EazyStock Setup.

The screenshot shows the 'EazyStock Job Queue Export' pop-up screen. The 'Split' section has 'Export Item' checked (5). The 'Single' section has 'Export Forecast Adjustment' checked (6). The 'Filter: Item' section has 'Vendor No.' set to '30000' (7). The 'Filter totals by:' section has 'Filter...' selected (8). The 'Filter: EAZY Location' section has 'Warehouse Code' set to 'HOOFD-I00ST' (9).

When all setup is done, Set Status to Ready.

[Back to General Tab](#)

Eazystock Manual Setting up API Connection in Eazystock BC Connector

Cause / Preface

Why is it necessary to take this step [subscribe]

Get the information

1. Contact Synchron for API Details for the Customer you want to set up.
2. You will Receive an API Details File and most important a KEY (Called Basic)
3. The information we need to setup the connection to the API are the following:

Go To: <https://www.base64decode.org/>

- **Client-ID and Secret-ID** we need to decrypt these ID's:
 1. Go to
 2. Copy the Basic send to you by Synchron in the first box.
 3. Set Auto detect by source character set
 4. Press Decode

Decode from Base64 format
Simply enter your data then push the decode button.

NTZxbWptNzJib2V1a2ZiMThiNnUwMjFrMWw6czVwcjRzaigzZHFuMjBlZjk4anAzbDFqYThzdGJvaTQyYWQzc
nNTZk

☒ For encoded binaries (like images, documents, etc.) use the file upload form a little further down on this page.

☒ AUTO-DETECT Source character set.

☐ Decode each line separately (useful for when you have multiple entries).

☒ Live mode OFF Decodes in real-time as you type or paste (supports only the UTF-8 character set).

< DECODE > Decodes your data into the area below.

56qmjm72boeukfb18b6...ll:s5pr4sj83dqn20ef98jp3l1ja8stboi42ad3s3ud9pci

1 2

5. In the box below decode you will see the Client-ID and Secret-ID. The Client-ID (1) is the part before : and the Secret-ID (2) is the part behind the dot.

- **Tenant-ID:** Can be found in the API Details file received from Synchron:

```
Inbound details
=====
Direct URL for Uploading the files till 4MB in size:
-----
Method          : PUT
URL             :
https://rest.api.eu.ints.syncroncloud.com/inbound/tenant/1f6459ea-0139-4be6-
840c-1d98c1a6c7/product/7cc1830e-75cb-413e-9c13-159bfc740712/file/<fileName>
Headers         : Content-Type:application/octet-stream
                  Authorization:<Obtained Authorisation Key>
                  Request Body:<filePath>
```

- **Product-ID:** Can be found in the API Details file received from Synchron.

```
Inbound details
=====
Direct URL for Uploading the files till 4MB in size:
-----
Method                : PUT
URL                   :
https://rest.api.eu.ints.syncroncloud.com/inbound/tenant/1f6459ea-0139-4be6-840c-0814d98c1a6c/product/7cc1830e-75cb-413e-9113-159bfc740712/file/<fileName>
Headers                : Content-Type:application/octet-stream
                        Authorization:<Obtained Authorisation Key>
                        Request Body:<filePath>
```

Setup In connector

1. Log in to BC and search for Eazystock Setup
2. Press related on the navigation and click setup user account.

EazyStock Setup

Related

 Setup User Account

3. Fill in the ID'S you have for this customer. (See chapter get the information)

Edit - EazyStock Setup User Account



Client ID

7c1d0c-75cb-41ba-9c10-f50bf740742

Client Secret

jndmrmfbcwvhwzuyghlftkxclstkdqyss53bh0

Tenant ID

1f6459ee-800e-42ab-a9ac-0ff7ea2e7a5e

Product ID

7c1d0c-75cb-41ba-9c10-f50bf740742

OKCancel

4. Press ok
5. Go back to Eazystock Setup (probably youre still in the screen) and find the Webservice tab.
6. When all the slides are **on** the ID's loaded successfully and you are Connected to Eazystock!

Webservice

Host URL Token	https://auth.api.eu.ints.syncroncloud.com/oauth2/token	Client ID Loaded	☒
Host URL Get File List	https://rest.api.eu.ints.syncroncloud.com/outbound/tena	Client Secret Loaded	☒
Host URL Upload File	https://rest.api.eu.ints.syncroncloud.com/inbound/tenan	Tenant ID Loaded	☒
Host URL PreSigned URL	https://rest.api.eu.ints.syncroncloud.com/inbound/tenan	Product ID Loaded	☒