



## Anyware Retail for Microsoft Dynamics 365 Business Central

An add-on app for Microsoft Dynamics 365 Business Central that helps you facilitate product management and simplify the purchasing process of seasonal products.

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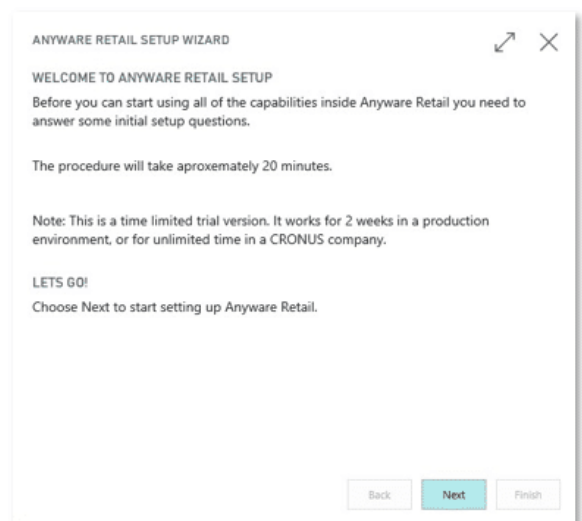
### GETTING STARTED

Anyware Retail for Microsoft Dynamics 365 Business Central is a solution for managing seasonal products from a retail perspective. These are the modules and tools used in the solution:

- Pricat / product master data
- Handling of size and color
- Matrix
- Item planning
- Store Replenishment

It is easy getting started with the solution. Once Anyware Retail is installed in Dynamics 365 Business Central, simply to go through the setup wizard and follow our steps below:

1. Click on **Setup & Extensions** in the menu, and then **Assisted Setup**, to get to the page with all the setup guides listed.
2. Select **Setup Anyware Retail**. It is probably located far down the page.
3. The setup wizard will now be started, and a welcome text appears on the screen. The guide is simple and contains preset values, which means that, in most cases, just clicking **Next** throughout the guide. The settings are explained in detail below.



|               |  |  |
|---------------|--|--|
| <b>Step 1</b> | What kind of items do you sell?  | Choose from seasonal styles in sizes and colors, simple items and/or stock items, or both.   |
|               | Do you want to automatically assign sizes from sizegroups or do you want to select sizes manually? | Only applies when an item with different sizes is created from scratch and a size group is placed on the item card.  |
|               | Which are your primary consumer-price currencies?  | These 4 different currency codes are presented in the Pricat view directly, per model. This means that recommended prices and sales prices can be displayed for these 4 currencies in an easy way. |

ANYWARE RETAIL SETUP WIZARD ↗ ✕

What kind of items do you sell?

Seasonal styles ▾

Do you want to automatically assign sizes from sizegroups or do you want to select sizes manually?

Automatically ▾

Which are your primary consumer-price currencies?

Currency Code 1 ..... EUR ▾

Currency Code 2 ..... SEK ▾

Currency Code 3 ..... DKK ▾

Currency Code 4 ..... NOK ▾

|        |   |   |
|--------|---|---|
| Step 2 | Do you apply presales ordering?                       | This means that the order type PREORDER will be preset in Business Central. PREORDER can be used on both sales orders and purchase orders.  |
|        | How many seasons do you work with per year?           | <p>For example, SPRING/SUMMER and AUTUMN/WINTER are 2 different seasons. Common seasons are:</p> <ul style="list-style-type: none"> <li>· SS</li> <li>· AW</li> <li>· XMAS</li> </ul> |
|        | How many years do you want to pre-create seasons for? | The guide prepares seasonal codes based on the number of seasons and the year for the coming years. The result is shown in “Step 3”.  |

ANYWARE RETAIL SETUP WIZARD ↗ ✕

Do you apply presales ordering?


How many seasons do you work with per year?

How many years do you want to pre-create seasons for?

**Step 3**

Suggestions  
for seasons.

Here you can make possible changes, verify and confirm seasons.

ANYWARE RETAIL SETUP WIZARD 

We have prepared a set of seasons based on the figures on the previous tab. Verify and confirm by pressing Next.

**Set up seasons**

| Code   | Description          | Sort Order ↑ |
|--------|----------------------|--------------|
| SS19   | Spring/Summer 2019   | 10           |
| AW19   | Autumn/Winter 2019   | 20           |
| SS20   | Spring/Summer 2020   | 30           |
| → AW20 | ⋮ Autumn/Winter 2020 | 40           |

**Step 4**

Suggestions for Item Groups.

The guide provides a proposal for a set of item groups mapped to item properties. In order to be able to import the demo-pricat, the proposal must be implemented without changes. Later on, it is possible to revise the entire item group structure.

ANYWARE RETAIL SETUP WIZARD

Item groups are the links between item categorization and posting setup. Below is a basic set of item groups to get you started.

**Set up item groups**

| Code ↑  | Description          | Item Category Code | Collection Code | Item Type Code |
|---------|----------------------|--------------------|-----------------|----------------|
| → 10011 | Him - Casual - T...  | HIM                | CASUAL          | T-SHIRTS       |
| 10012   | Him - Casual - Je... | HIM                | CASUAL          | JEANS          |
| 10013   | Him - Casual - S...  | HIM                | CASUAL          | SWEATSI        |
| 10021   | Him - Oxford - K...  | HIM                | OXFORD          | KNITWE         |
| 10022   | Him - Oxford - S...  | HIM                | OXFORD          | SHIRTS         |
| 10031   | Him - Sport - Sh...  | HIM                | SPORT           | SHORTS         |
| 10032   | Him - Sport - Un...  | HIM                | SPORT           | UNDERV         |
| 10051   | Him - Casual - A...  | HIM                | CASUAL          | ACCESSO        |

Back Next Finish

**Step 5**

Brands.

Every brand that is sold and/or purchased needs to be included in the list of brands to enable analysis. A proposal is given for the brand “NEWBRAND”. To be able to import the demo-pricat, it is required that “NEWBRAND” exists. Later on, it is possible to revise the entire brand structure.

ANYWARE RETAIL SETUP WIZARD

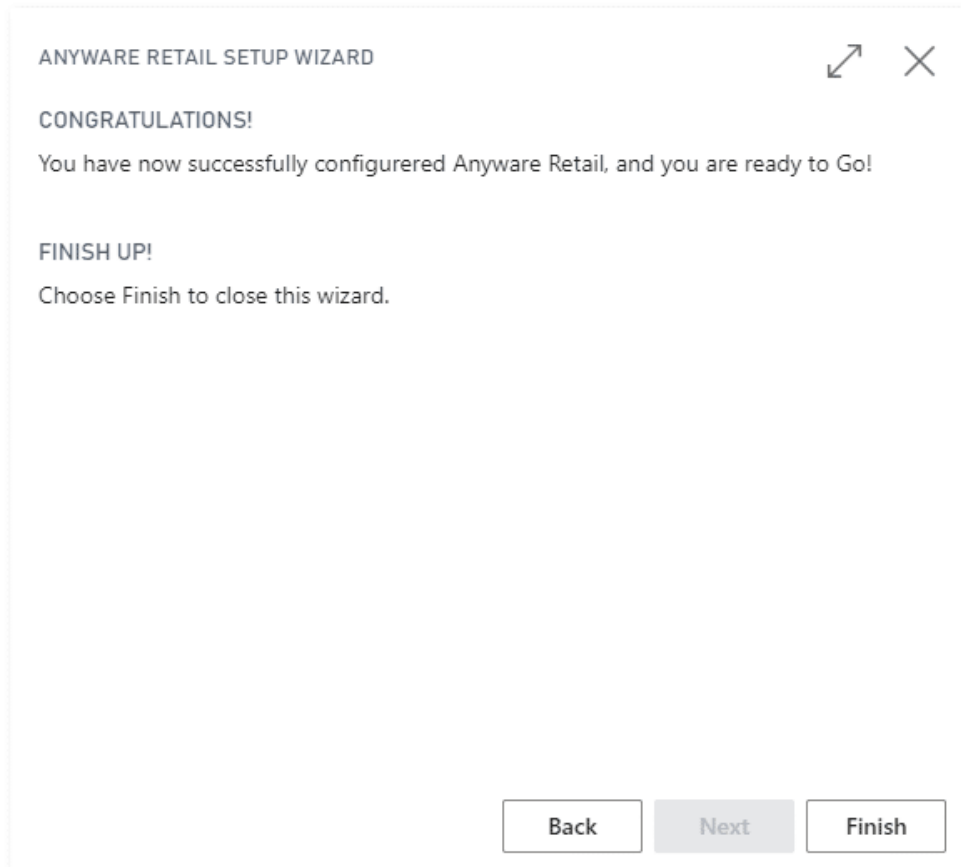
We are almost ready to create products, but first we need to define the brands and connect them to vendors. Below is an example.

Set up brands | Manage

| Code ↑     | Description        | Vendor No. | Vendor Name    |
|------------|--------------------|------------|----------------|
| → NEWBRAND | Newbrand Clothi... | 10000      | Fabrikam, Inc. |

Back Next Finish

|               |                           |   |
|---------------|---------------------------|---|
| <b>Step 6</b> | Complete the setup guide. | After the setup wizard is completed, click on <b>Finish</b> . |
|---------------|---------------------------|---|



Anyware Retail is now set up and ready to go. To import the pricat and create items with different sizes and colors, proceed to the section **Import a pricat from Excel**.


# PRICAT

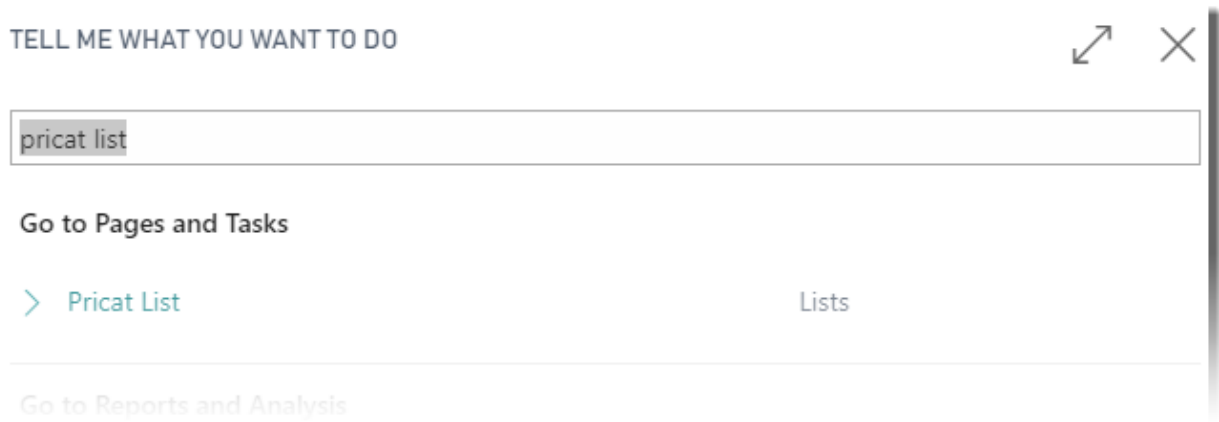
## Introduction

A pricat is an Excel sheet filled with item information, also called “master data”. The purpose with pricat is to simplify the artikelupplägget and ensure the quality of the item information. An example of a pricat can be found here (link to our NEWBRAND pricat). This example can be used as an introduction and help when implementing a pricat flow.

## Importing a pricat in Excel format

To import a pricat in Anyware Retail, follow these steps:

1. Click on the search button  in the upper right corner of Business Central.
2. Search for **Pricat List** in the search field.



3. In the results that appears below, click on **Pricat List**. You will now be sent to the lists of pricats in the system.
4. In the upper menu you will find an option that says **Import Pricat from Excel**. Click it.



5. An “Open file”-dialog will now appear on the screen. Choose a pricat file and click **OK**. First time? Please use our pricat template above for testing.
6. A new line will now appear in the list of pricats. To open the pricat, click the “...”-button to the right of the number in the far left column. In the row menu that appears, click on **Edit**.
7. The pricat is now displayed on the screen.



## Pricat's structure

The pricat view is made up of a number of tabs. At the top is general information, then all the item models and another 3 tabs:

- General
- Item Models
- Integration
- Order Dates
- Sales Prices

The pricat contains items and its master data, and can live in the system until the information is uninteresting.

When items are created, the information relevant to Business Central is copied to the item card. This means that when all items requested from a pricat are created as an item card, the pricat is no longer needed. However, there may be other aspects to remain the pricat. When the pricat is no longer needed, it can be removed.

The following fields are available in the pricat:

| Name           | Editable | Description                    |
|----------------|----------|--------------------------------|
| <b>General</b> |          |                                |
| No.            | No       | No. According to No. Series.   |
| Name           | No       | Pricat's name from the vendor. |
| Description    | Yes      | Internal description.          |

|                     |     |   |
|---------------------|-----|---|
| Vendor No.          | No  | Connected Vendor No. Follows the Brand Code.                          |
| Vendor Name         | No  | Name of the Vendor.   |
| Brand Code          | Yes | Brand Code. Can be controlled if it has not been imported.            |
| Brand Description   | No  | Name of the Brand.  |
| Season Code         | Yes | Season Code. Included in the Excel file or is set manually.           |
| Item Status Code    | Yes | Item Status included in the Item Card. Can be preset in the settings. |
| Currency Code       | No  | Currency for all purchase prices.                                     |
| Blocked Date        | No  | Is set when a pricat is blocked.                                      |
| Blocked By User     | No  | Is set when a pricat is blocked.                                      |
| Comment             | Yes | Internal comment.   |
| Update Sales Prices | Yes | Indicates whether sales prices should be updated on existing items.   |

|                         |     |  |
|-------------------------|-----|--|
| Sales Price Per Variant | Yes | In most casesm the items have the same sale prices regardless of sixe and color. However, if this is not the case, this setting can be activated for individual pricats. The sales prices are then imported per variant. |
| <b>Item Models</b>      |     |  |
| Model No.               | No  | Vendors Model No.  |
| Item No.                | No  | Internal Item No. from when the item was created. Matchinh is done on EAN Code.  |
| Last Updated Date       | No  | Last updated date  |
| Name                    | No  | Product name   |
| Description             | No  | Product description  |
| Size Range              | No  | Size Range/Group   |
| Item Group Code         | No  | Item Group Code from the Excel file.   |
| Item Group Description  | No  | Item Group Description.  |
| Preorder Price          | No  | Preorder price purchase from the vendor.   |

|                     |    |  |
|---------------------|----|--|
| Normal Price        | No | Purchase price supplement from the vendor.   |
| Gross Price         | No | Gross Price purchase from the vendor.  |
| Preorder Discount % | No | Preorder Discount from the vendor.   |
| Normal Discount %   | No | Supplement Discount from the vendor.   |
| RRP (4 columns)     | No | Consumer prices for the most common currency codes. In parantheses, converted sales prices are shown according to sales price regulations.   |
| No. Of Variants     | No | Number of variants in different sizes and colors per model/style.  |
| Order Quantity      | No | Order Quantity. By clicking the field, a matrix for entering quantities will be displayed in the system.   |
| Blocked             | No | Indicated that the model/style is blocked.   |
| Status              | No | Status flag after comparison with the item register. Indicates if the entire model/style is in the item register, if any variant is missing or if the whole model/style is missing. Comparison is made against the EAN code. |

|                          |     |   |
|--------------------------|-----|---|
| Tariff No.               | No  | Tariff number for intrastat reporting.  |
| Update                   | Yes | Check for the models/styles you wish to create as items. Can be batch-checked through buttons in the toolbar. |
| <b>Integration</b>       |     |   |
| Created Date Time        | No  | Date and time when the pricat was imported.   |
| GLN No.                  | No  | GLN number for the vendor.  |
| Received By              | No  | If the pricat is received through integration, this will be shown here.                                       |
| Log Entry No.            | No  | Log record for the pricat in the integration.   |
| Last Processed Date Time | No  | Last updated, date and time.  |
| Last Processed By        | No  | Last updated by User ID.  |
| <b>Order Dates</b>       |     |   |
| Valid Order Date From    | No  | Date indicating the first order date for pricat items and prices.   |

|                        |     |  |
|------------------------|-----|--|
| Valid Order Date To    | No  | Date indicating the last order date for pricat items and prices.   |
| Valid Ship Date From   | No  | Date of first ship/delivery  |
| Valid Ship Date To     | No  | Date of last ship/delivery   |
| <b>Sales Prices</b>    |     |  |
| Sales Price Start Date | Yes | By filling in the start date and end date, the dates can be included in the price list and control the availability of consumer price. |
| Sales Price End Date   | Yes | See above.   |

After importing the Excel file and creating a pricat, the items are automatically checked in the pricat against the item register through the EAN code. For the EAN codes set up in the item register, the item number is mapped in the “Item No.” field. The “Update” checkbox is automatically checked for these items. You can also check the “Update” checkbox manually for additional items.

The pricat has a number of buttons in the head. These are described in detail below:

|             |  |
|-------------|--|
| <b>Head</b> |  |
| Check Items | Checks all models/styles in the pricat against the item register. Comparison is made against the EAN code. |

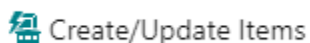
|                        |   |
|------------------------|---|
| Create/Update Items    | Creates and updates items that have the “Update” checkbox checked. New item cards are created and existing ones are updated with the new information. |
| Create Purchase Order  | Creates purchase orders against the vendor for the items that have quantities filled.   |
| Pricat RRP Currencies  | Settings for the pricat’s consumer currencies. Controls which price list the sales prices should end up in per currency.                              |
| Add to Store Segment   | Adds items to any store segment.  |
| Item Groups            | Shortcut to the Item Group List.  |
| Locations              | Shortcut to the locations list  |
| Price Conversion Rules | Opens the settings view for converting consumer prices.   |
| <b>Lines</b>           |   |
| Attributes             | Displays all additional properties for all variants of the current model.   |
| Variants               | Displays the list of colors and sizes for the current model.  |

|                   |   |
|-------------------|---|
| Prices            | Displays the list of purchase prices and consumer prices for the current model.                     |
| Item Card         | Shortcut to the item card for the current model. This assumes that the column "Item No." is filled. |
| Select – All      | Checks the "Update" checkbox for all models.  |
| Select – New      | Checks the "Update" checkbox for all models that have not been creates as items before.             |
| Select – Existing | Checks the "Update" checkbox for all models that have an item number in the "Item No." column.      |
| Deselect – All    | Removes the check from the "Update" checkbox for all models.  |

### Create Item Cards

To create item cards based on the items in a pricat, do the following:

1. Make sure that the **Update** checkbox is checked for the models/styles you want.
2. Click the **Create/Update Items** button.



3. A confirmation dialog appears. Answer **Yes**.

The item cards are now created. When this is done, the **Item Card** shortcut under the **Navigate** button above the rows can be used to display the item card for the desired model.



## Newbrand - SS19

Check Items Create/Update Items Create Purchase Orders Pricat RRP Currencies Add to Store Segment Item Groups Locations Price Conversion Rules

Vendor No. 10000 Blocked By User  
Vendor Name Fabrikam, Inc. Comment  
Brand Code NEWBRAND Update Sales Prices  
Brand Description Newbrand Clothing Sales Price Per Variant  
Season Code SS19

Item Models Navigate Select Deselect Fewer options

| Model No. ↑ | Item No. | Last Updated Date | Name | Description | Size Range | Item Group Code | Item Group Desc |
|-------------|----------|-------------------|------|-------------|------------|-----------------|-----------------|
|-------------|----------|-------------------|------|-------------|------------|-----------------|-----------------|

Details Attachments (0)

Vendor Details


Vendor No. 10000  
Name Fabrikam, Inc.  
Phone No.  
Email krystal.york@contoso.com  
Fax No.  
Contact Krystal York

Vendor Statistics

### Create a purchase order for pre-order

Normally, purchase orders are created against the vendors through the purchase proposal, and in some cases: manually. In Anyware Retail, this opportunity is expanded by, directly from the pricat view, creating purchase orders to the central warehouse, to each of the stores or just to the e-commerce.

Here is how you do it:

1. Open up the desired pricat on the screen.
2. Make sure the item cards are created for all the desired models/styles.
3. Find the first model/style to order and click in the **Ordered Quantity** column.
4. The matrix view now appears on the screen.
5. Fill in the quantity for the variants you want to order and click the **OK** button.
6. Note that the **Ordered Quantity** column has been updated with the correct amount.
7. Repeat for all desired models/styles.
8. Click on the **Create Purchase Order** button in the head.  
 Create Purchase Orders
9. A control question dialog box appears on the screen. Click **Yes**.
10. The option to choose the order type is also displayed. Select the order type you want and click **OK**.
11. A list of all warehouse locations is displayed in the screen. By selecting one or more warehouse locations, one or more purchase orders will be created simultaneously.
12. A confirmation is displayed of how many purchase orders have been created, as well as the opportunity to see a list. Click **Yes**.
13. A list of purchase orders created is displayed on the screen. Select the first purchase order and click on **View**.

14. The purchase order is now displayed on the screen, and the order lines can be viewed.
15. Finally, by clicking on the **Send** button, the purchase order can be sent directly to the vendor in PDF format.

## ITEM CARD

### Introduction

Anyware Retail enables extended analysis possibilities through several different extra attributes on the item cards. All these attributes are included in sales and purchasing documents and, when accounting, further down at the transaction level. This means that follow-up can be done both on the basis of the actual values of the item card, but also based on the values that were relevant at the time of posting.

The following attributes are available on the item card:

- Season
- Collection
- Item Group
- Item Type
- Brand
- Theme
- Composition
- Size Group
- Item Status

### Size matrix

By creating item variants, the use of a size matrix is allowed when ordering. Anyware Retail supports matrices in 2 dimensions. However, in the following different variants:

- Size
- Color / Size
- Size / Size

The latest mentioned matrix allows color code to be entered directly on the item card, which means that the same follow-up possibilities exist for this type of item as well.

Item variants are created by creating a size group, as well as several different colors are selected on the item card. To create a model/style with different variants, do the following:

1. Create a new, blank item card and assign a new **Item No.**
2. Fill in the base fields on the general tab, and if you have any accounting templates.
3. Go to the **Color / Size** tab.
4. Change **Style Type** to **Style**.
5. Select the desired matrix type in the **Matrix Type** field, preferably **Color / Size**. Possible additional settings will now be available.
6. Depending on the matrix type, you can add additional settings. If you for example choose "Color / Size", a number of colors need to be selected. Click on **Colors** and select color codes. Then assign a size group in the **Size Group Code** field.
7. Click on the **Sizes** field and check the desired sizes.
8. Depending on whether variants are created automatically or not, click on **Create Variants** on the buttons at the top.
9. Variants are now created for selected colors and sizes. These can be seen under the menu option **Variants**.

## MATRIX FUNCTIONALITY ON SALES AND PURCHASE DOCUMENTS

### Introduction

To simplify order entering in both sales and purchasing, Anyware Retail offers the use of a size matrix. The procedure is simple: the matrix appears as a pop-up window when a model / style of different sizes is ordered.

The purchase order, like the sales order, is also extended with 2 fields:

- Season Code
- Order Type Code

In this way it is also possible to keep track of what season a purchase order belongs to and whether it is a pre-order or a supplement order. These fields form the basis for the corresponding fields in the order lines, which in turn follow down at the transaction level for subsequent follow-up.

### Order items in different colors and sizes

To create a purchase order through matrix:

1. To create a new purchase order, go to the purchase order list and click on the **New** button.
2. Select a vendor in the **Vendor Name** field.
3. Jump down to the rows and to the **Type** column. Make sure **Item** is selected in that column.
4. Tab to the **No.** field.
5. Enter the model / style part no. Press **Enter**.
6. The size matrix is displayed on the screen.

The size matrix consists of a head, rows and fact boxes in the right column. The header contains information about the item, as well as which field you want to fill in the matrix. You can also choose to display a statistical value such as stock balance for example. The statistical value is shown in parentheses in the respective cell in the matrix.

The rows consist of color names on the left and then one column per size. The matrix supports up to 30 different sizes.

In the fact boxes to the right, an item image from the item card is shown at the top, and below you can find properties from the current color in the matrix.

1. Fill in the number for the desired sizes in the matrix. If statistical value is active, note that the **WHOLE** content of the cell needs to be marked and replaced when the number is filled in. All content in the cell must therefore be erased when a new number is entered.
2. Tab to the next cell. The statistical value is now recalculated for the filled cell.
3. When all the desired sizes are filled, click on the **OK** button.
4. The matrix is now closed and the purchase order is displayed on the screen.

The purchase order now has rows automatically created. At the top is the name of the style as a comment line. Below this is a row for each color in combination with the size that you want to order. The description of resp. variant is color designation in combination with size.

To view the purchase order in PDF format, click on **Print**.

## ITEM PLANNING AND ORDER POINTS

### Introduction

Item Planning in Anyware Retail is a purchase proposal / replenishment proposal from a vendors with a focus on trade. Item planning does not support mounting items or production, in those cases the standard feature "Purchase proposal" in Business Central is recommended. However, item planning comes with a number of convenience factors compared to the standard feature "Purchase Proposals":

- Clearer current analysis of the proposal
- Tracking needs and access
- Date control of order points and parameters
- Limitation of sales order requirement by seasonality and order type filtering

### Generate suggestions

A proposal in item planning is easily generated as follows:

1. Search for "Item Planning Worksheet" and click on the menu item in the result.
2. Item planning is now displayed on the screen.
3. Click "Calculate Plan". A filter dialog will now appear.
4. Fill in an up-to-date, ie. the date you want to calculate the need for.
5. Specify a Location-filter.
6. Click "OK".

A proposal for all items is now calculated and displayed in the worksheet.

In the worksheet, the following columns are available for each of the rows:

- Item No.
- Variant Code
- Description
- Description 2
- Location Code
- Replenishment System
- Vendor No.
- Vendor Item No.
- Quantity (to order)
- Inventory
- Qty. On Sales Order
- Qty. On Outbound Transfer
- Qty. On Purchase Order
- Qty. On Inbound Transfer
- Total Qty. On Purchase Order
- Scheduled Receipt Date
- Amount
- Action

It is also possible to track the need for a single line. This is done by clicking on the **Tracking / Details** button. A view is now displayed with each of the item's relevant parameters, e.g. safety stock level.

### **Create purchase order / transfer order**

By clicking on the button **Carry Out Actions**, purchase orders are generated and transfer orders depending on "Replenishment System". One purchase order per vendor.

### **Order points**

Order points ensure the stock levels of the items in a simple and natural way. However, this requires that the order items are regularly reviewed. As an aid, therefore, Anyware Retail allows date-controlled order points.

Anyware Retail supports the following parameters at either item level or at variant level:

- Safety Stock
- Order point and order quantity
- Order limit and maximum stock balance
- Multiple orders

The parameters are edited based on the following concepts:

- Brand
- Collection
- Season

To edit the order Points for a given brand, do the following:

1. Go to the list of brands, **Brands**.
2. Select the desired brand.
3. Click the **Item Parameters** button.
4. The view for maintaining item parameters is now displayed on the screen. All variants for the brand are included in the list.
5. In the head you can choose a parameter set, a **Plan Code**. A "Plan Code" is applicable when any of the following is desired:
  1. Date Control. Each Plan Code has a start date and an end date.
  2. Manual selection / change of parameter set for different types of item planning.
7. By changing Plan Code the item parameters are also changed, depending on the values stored in the parameter set.

In the same way, the parameters can be edited for a given planning proposal, ie after an item planning is generated. A click on **Item Parameters** will then show the parameters for all the variants for the items included in the item planning.

Date management is done at "Plan Code" level. In the item planning there is a button **Plan Codes**, which shows a list of all Plan Codes created. By editing the parameter set, a view is displayed with all

items and variants with parameters set for the current parameter set. In the head there is a start date and an end date.

Item planning will automatically suggest the first parameter set with a valid date.

[Click here to learn more about Anyware Retail.](#)