



User Guide

Reservation Enhancer

Last updated: February 8, 2023

TABLE OF CONTENTS

Table of Contents 2

1. About..... 3

2. Setup..... 4

3. Features..... 5

4. Security 7

5. Registration..... 8

1. ABOUT



The Reservation Enhancer app enables users to automatically reserve inventory for sales orders against inbound inventory. The app also automated reallocation of reserved inventory for open sales orders during downtime & allows for manual overrides of reservations. All actions are tracked for audit purposes.

The Reservation Enhancer app optimizes your sales process within Microsoft Dynamics 365 Business Central.

For more information, please go to <https://www.websan.com/mrp-enhancer>.

2. SETUP

The Reservation Enhancer app requires that items be configured to have the Receive field as “Always”. Any items wherein this value is not set on the Item card will not have the associated Sales Order Line updated.

Allow Reservation must be activated to utilize the application.

The Allow Reservation Date is calculated as Shipment Date – [Inbound Whse Handling Time from the (Inventory Setup) + Lead Time Calculation (Stockkeeping Unit) OR Default Safety Lead Time (Manufacturing Setup)]. Please ensure these values are populated in order to fully utilize the application.

It is recommended that the following values are configured:

Stockkeeping Unit Lead Time Calculation – Otherwise the Default Safety Lead Time from the Manufacturing Setup will be utilized

Manufacturing Setup – Default Safety Lead Time

Inventory Setup – Inbound Whse Handling Time

3. FEATURES

The Reservation Enhancer app will automatically reserve sales order lines wherein “Allow Reservation Date” field on the line is less then the current date.

The Allow Reservation Date is calculated as Shipment Date – [Inbound Whse Handling Time from the (Inventory Setup) + Lead Time Calculation (Stockkeeping Unit) OR Default Safety Lead Time (Manufacturing Setup)].

Please select “Calculate Allow Reservation Date” in order to set the Allow Reservation Date value on Sales Order Line.

The application uses job queue entries to process the reshuffling of reservations on sales orders as well as back orders:

Status	User ID	Object Type to Run	Object ID to Run	Object Caption to Run	Description	Job Queue Category Code	User Session Started	Earliest Start Date/Time	Scheduled	Resourcing	No. of Minutes Between Runs
In Process	WESANBC	CodeUnit	71999006	WS10052 JobQueueProcessor	Reservation Reshuffling of open sales orders.		2024-01-15 1:16 PM	2024-01-16 12:10 AM	☐	☐	1440
In Process	WESANBC	CodeUnit	71999006	WS10052 JobQueueProcessor	Auto Reserve Items on Sales Line for BackOrder based o...		2024-01-15 1:16 PM	2024-01-15 1:16 PM	☐	☐	10

Reservations that have been updated can be viewed on the home screen by selecting the highlighted option below:

Customers Vendors Items Bank Accounts Chart of Accounts

Notifications: 5 Continia OPplus has been installed. W... | Continia Document Capture has been installe... | Your Dynamics 365 Business Central environment has apps installed that may transfer data to other geographies than the cu

Headline

Want to learn more about Business Central?

Actions
 + Sales Quote + Sales Invoice + Purch
 + Sales Order + Purchase Quote + Purch

Activities

Sales This Month: £231 > See more

Overdue Sales Invoice Amount: £2,313,420 > See more

Overdue Purch. Invoice Amount: £761,998 > See more

Sales Invoices Predicted Overdue: 0 > See more

Ongoing Sales

Sales Quotes: 9	Sales Orders: 364	Completely Re... from Stock: 87	Sales Invoices: 0
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Ongoing Purchases

Purchase Orders: 725	Ongoing Purc... Invoices: 1	Purch. Invoices... Next Week: 17
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Removed Reservations: Pending to Acknowledge 43

Payments: Unprocessed Payments 0

User Tasks: My User Tasks 0

Email Status: Email Activities (Failed, Draft, Sent) all 0

Approvals: Pending Approvals (Requests Sent, Requests to Approve) all 0

Intercompany: Incoming Transactions (New, Rejected) all 0; Outgoing Transactions (Intercompany to Send) 0

Pending to Acknowledge

Search Acknowledge More options

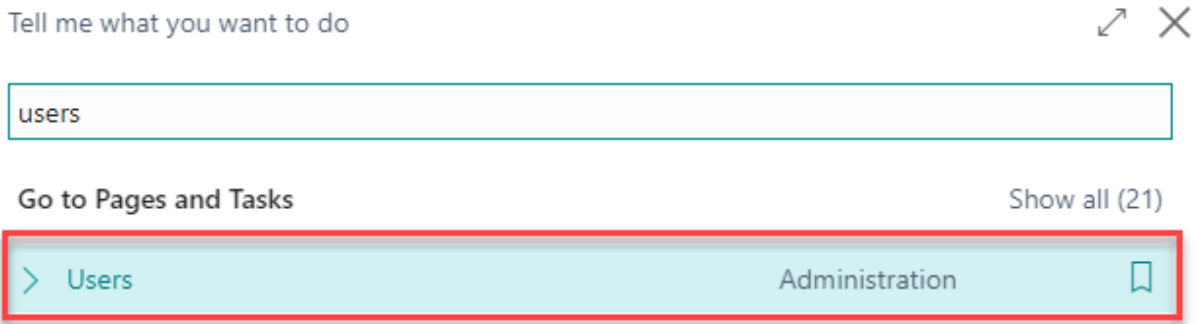
Order No.	Order Line No.	Customer No.	Customer Name	Item No.	Item Description	Order Line Quantity	Order Rep	Currently Reserved Qty	Previously Reserved Qty	Shipment Date	Transfer Order No.	Purchase Order No.	Item Ledger Entry No.	Created At	Changes Acknowledged By User ID	Changes Acknowledged At	Entry No. *
S-ORD10478	20000	3302132	CARE SHOP LIMITED	J5104005E	Sleeprite thermal blanket, peach...	20	ROB	0.00	20.00	2024-01-28		100795		2023-12-23 12:03...			1
S-ORD10505	10000	C300184	COUNTYWIDE HEALTHCARE SU...	ZVPM314HC	Vinyl brief, 3-pack, M	60	ROB	60.00	60.00	2024-01-08	C0000195-7			2023-12-23 12:03...			2
S-ORD105468	110000	C300281	HOMECARE MEDICAL SUPPLIES L...	TOW/HAND/...	Hand towel, lemon, 50x80cm (6)	60	COLN	36.00	60.00	2024-01-15			37673	2023-12-23 12:03...			3
S-ORD105738	10000	C300383	NHS SUPPLY CHAIN	PST20086	Patient specific slide sheet, subula...	400	CHRIS	0.00	70.00	2024-01-08			37630	2023-12-23 12:03...			4
S-ORD105787	10000	C300010	HOSPITAL TEXTIL HANDELSESSE...	J5100-0002	Disposable bed sheet, 100 per pac...	15	PAUL	9.00	15.00	2023-12-22		106879	37668	2023-12-23 12:03...			5
S-ORD105805	20000	C300020	CARE HOME INTERIORS LTD	WC060-0103	Clean room gown, Steris, blue, M...	11	ROB	8.00	11.00	2024-01-04		106883		2024-01-04 7:16...			6
S-ORD105805	30000	C300020	CARE HOME INTERIORS LTD	J5100-0002	Disposable bed sheet, 100 per pac...	15	ROB	10.00	15.00	2024-01-04		106883		2024-01-04 7:16...			7
S-ORD105805	20000	C300020	CARE HOME INTERIORS LTD	WC060-0103	Clean room gown, Steris, blue, M...	11	ROB	0.00	11.00	2024-01-04		106883		2024-01-04 7:31...			8
S-ORD105805	30000	C300020	CARE HOME INTERIORS LTD	J5100-0002	Disposable bed sheet, 100 per pac...	15	ROB	0.00	15.00	2024-01-04		106883		2024-01-04 7:31...			9
S-ORD105805	30000	C300020	CARE HOME INTERIORS LTD	WC060-0103	Clean room gown, Steris, blue, M...	11	ROB	0.00	11.00	2024-01-04		106883		2024-01-04 11:00...			10
S-ORD105805	30000	C300020	CARE HOME INTERIORS LTD	J5100-0002	Disposable bed sheet, 100 per pac...	15	ROB	0.00	15.00	2024-01-04		106883		2024-01-04 11:00...			11
S-ORD105808	10000	C300020	CARE HOME INTERIORS LTD	J5100-0002	Disposable bed sheet, 100 per pac...	20	ROB	0.00	20.00	2024-01-05		106884		2024-01-05 7:56...			12
S-ORD105808	20000	C300020	CARE HOME INTERIORS LTD	J5220-0002	Disposable pillowcase, 200 per pa...	25	ROB	0.00	25.00	2024-01-05		106884		2024-01-05 7:56...			13
S-ORD105808	10000	C300020	CARE HOME INTERIORS LTD	J5100-0002	Disposable bed sheet, 100 per pac...	20	ROB	0.00	20.00	2024-01-05		106884, 106883		2024-01-05 8:04...			14
S-ORD105808	20000	C300020	CARE HOME INTERIORS LTD	J5220-0002	Disposable pillowcase, 200 per pa...	25	ROB	0.00	25.00	2024-01-05		106884		2024-01-05 8:04...			15
S-ORD105808	20000	C300008	HAMBERLEY CARE (ENFIELD) LTD	J5100-0002	Disposable bed sheet, 100 per pac...	15	ISP	0.00	15.00	2024-01-08		106884		2024-01-05 8:04...			16
S-ORD105807	20000	C300010	HOSPITAL TEXTIL HANDELSESSE...	J5100-0002	Disposable bed sheet, 100 per pac...	15	PAUL	0.00	15.00	2023-12-13		106884		2024-01-05 10:32...			17
S-ORD105808	10000	3302008	HAMBERLEY CARE (ENFIELD) LTD	J5100-0103	Clean room gown, Steris, blue, M...	11	ISP	0.00	11.00	2024-01-08		106883		2024-01-10 10:41...			18
S-ORD105806	20000	C300008	HAMBERLEY CARE (ENFIELD) LTD	J5100-0002	Disposable bed sheet, 100 per pac...	15	ISP	0.00	15.00	2024-01-08		106884		2024-01-10 10:41...			19
S-ORD105807	10000	C300010	HOSPITAL TEXTIL HANDELSESSE...	WC060-0103	Clean room gown, Steris, blue, M...	11	PAUL	0.00	11.00	2023-12-13		106883		2024-01-10 12:30...			20
S-ORD105807	20000	C300010	HOSPITAL TEXTIL HANDELSESSE...	J5100-0002	Disposable bed sheet, 100 per pac...	15	PAUL	0.00	15.00	2023-12-13		106884		2024-01-10 12:30...			21
S-ORD105806	10000	C300008	HAMBERLEY CARE (ENFIELD) LTD	WC060-0103	Clean room gown, Steris, blue, M...	11	ISP	0.00	11.00	2024-01-08		106883		2024-01-10 12:31...			22

4. SECURITY

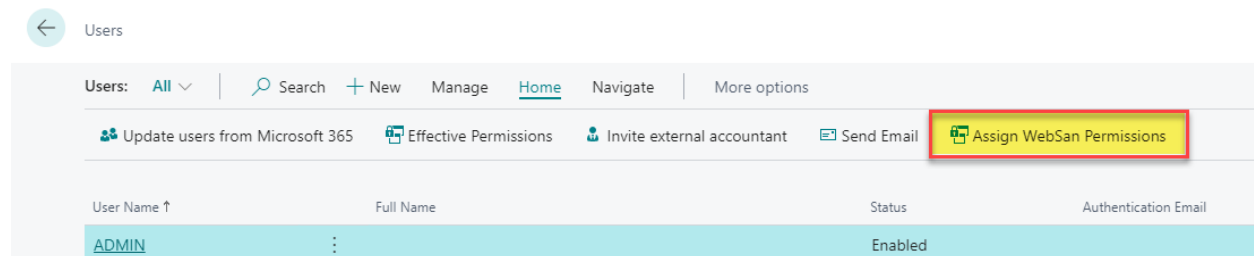
The Reservation Enhancer app, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in AutoPermission security functionality. When a user with the proper credentials installs an App, the AutoPermission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the AutoPermission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.



In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



5. REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.








Tell me what you want to do ↗ ✕

websan client information


Go to Pages and Tasks

> WebSan Client Information Administration 🔖

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.

    ✓ Saved   

WebSan Client Information

 Transmit Data

General

MS Client ID On Hold

Active

Contact Information

Company *	PostalCode / ZipCode *
Name *	Country *
Address *	Phone
Address2	Email
City *	Email CC
Province / State *	Billing is Same as Co... <input checked="" type="checkbox"/>