

OneBizz for D365 BC

OneBizz key usage scenario

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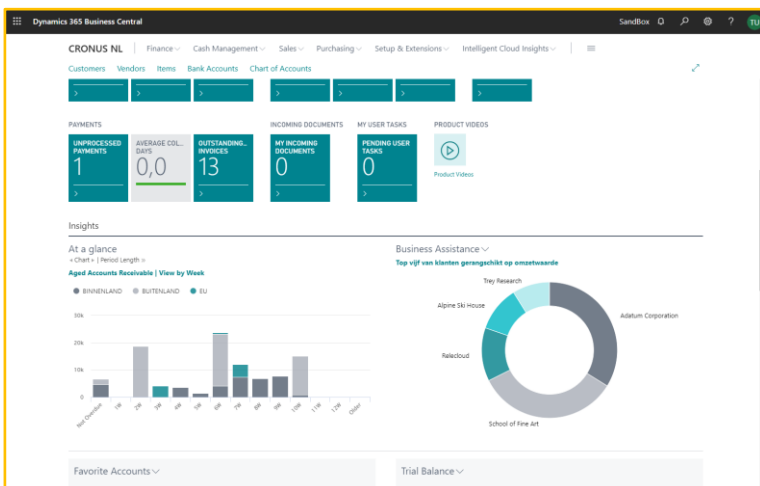
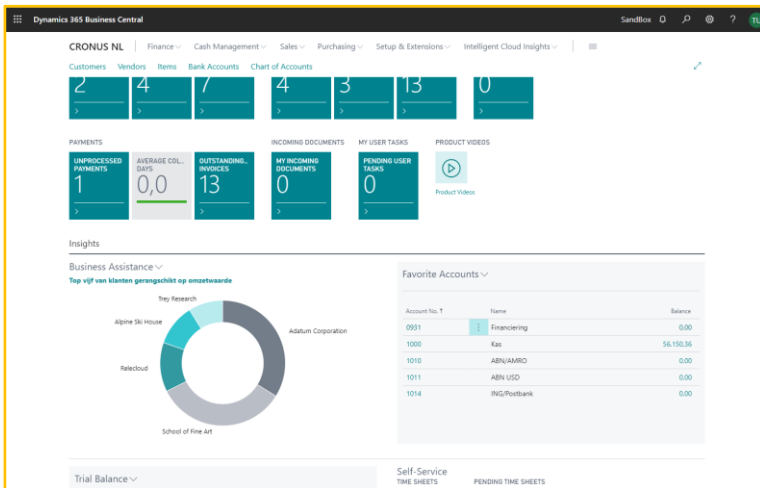
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Prerequisites

The scenario in this document requires that the user is assigned the 'Business Manager' role center, and the 'OBZ-SETUP' and 'OBZ-USER' permission sets. This document assumes you have started a new company, using the CRONUS NL demo data.

Role Center

The OneBizz extension adds a few items to the Business Manager rolecenter. The next two images show a part of that rolecenter before and after installation of the Extension. In the second image, you see an addition chart part has been added to the rolecenter. The exact Chart that is shown depends on available data and setup.



At a glance

The chart part that has been added to the rolecenter is called 'At a glance' and can show several Charts. Click on the little arrow icons next to the word 'Chart' to go to the previous or next chart. The color of the arrow changes if you hover your mouse over it.



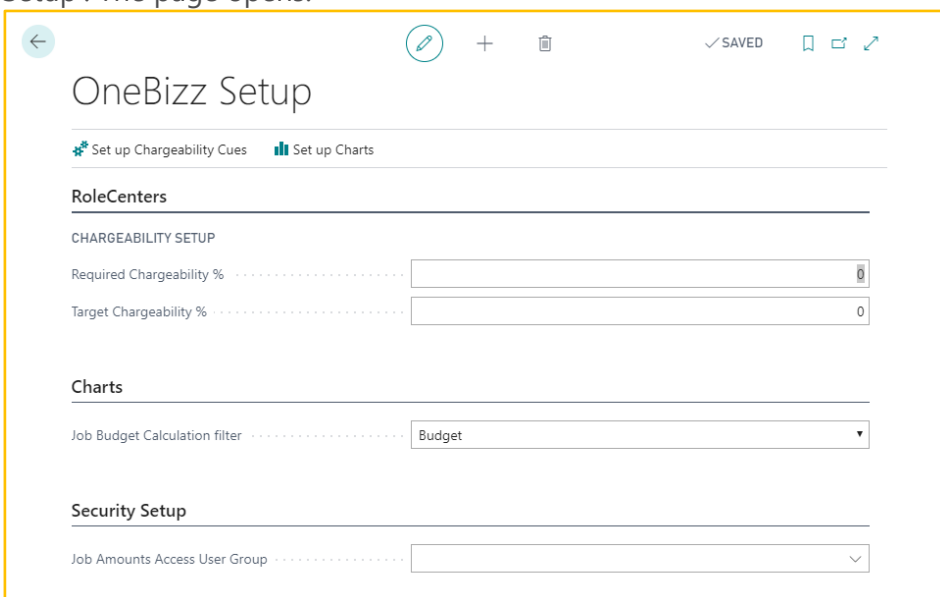
Take note that some of the charts are about 'Time Sheets', and that there is no data available for these charts.

Select the 'Customer Top 10' chart and verify that the bars show the same data as the default Top 5 customer pie chart next to it.

Setup

To set up the charts, you need to go to OneBizz Setup.

Open this page by using 'Tell Me', or by going to 'Setup & Extensions', 'Manual Setup', 'OneBizz Setup'. The page opens:



Click on action 'Set up Charts'. The next page opens:

ONEBIZZ CHARTS | WORK DATE: 8-4-2019 ✓ SAVED

Search + New Edit List Delete Page More options

Codeunit ID ↑	System Name ↑	Name	Process ID ↑	Profile ID ↑	Permiss Set ID ↑
→ 70121326	Time Sheets	Time Sheets	TIME		
70121326	Time Sheets - Budget Tracking	Time Sheets - Budget Tracking	TIME		
70121326	Time Sheets - Status	Time Sheets - Status	TIME		
70121326	Time Sheets - Type	Time Sheets - Type	TIME		
70121327	Cashcyclus	Cashcyclus	FINANCE		
70121327	Cashflow	Cashflow	FINANCE		
70121327	Inkomsten en uitgaven	Inkomsten en uitgaven	FINANCE		
70121328	Aged Accounts Payable	Aged Accounts Payable	FINANCE		
70121328	Aged Accounts Receivable	Aged Accounts Receivable	FINANCE		
70121328	Aged Inventory	Aged Inventory	INVENTORY		
70121329	Inventory Performance	Inventory Performance	INVENTORY		
70121330	Customer Top 10	Customer Top 10	COMPANY		
70121330	Sales by Customer Group	Sales Trends by Customer Group	SALES		
70121330	Trailing Sales Orders	Trailing Sales Orders	SALES		

Use the horizontal scroll bar to show the rightmost column, 'Enabled'. Uncheck all charts except the 'Customer Top 10' chart (you can't disable this chart).

Close the page and return to the rolecenter.

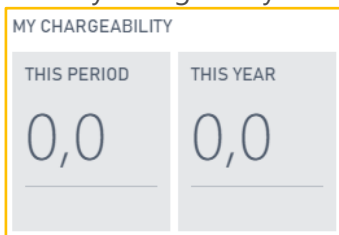
Verify that the Customer Top 10 chart is still available, but that you cannot select a different chart now.

Chargeability information

In the rolecenter, in the 'Self-Service' page part (available on multiple rolecenters), three tiles have been added: one for 'Overdue Time Sheets' and two for 'My Chargeability'.

Two additional, but invisible tiles are added for 'Team Chargeability'. These are only visible if the user is 'Time Sheet Manager'.

The 'My Chargeability' tiles look like this:



The color information for these tiles is set up in the OneBizz Setup page.

Setup the Chargeability cues

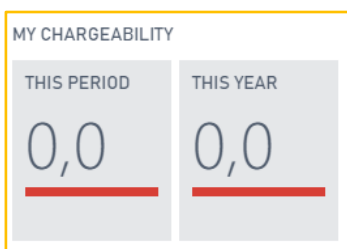
Open the 'OneBizz Setup' page (through 'Tell Me' or 'Manual Setup', as described earlier) and uncollapse the 'RoleCenters' group, if necessary.

In the 'Required Chargeability %' field, enter 80.

In the 'Target Chargeability %' field, enter 85.

Select 'Set up Chargeability Cues' from the Action bar.

Close the Setup page and return to the rolecenter.



The colored bar on the 'My Chargeability' tiles has been changed. It is now red to indicate that the required chargeability % has not been achieved yet.

OneBizz

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