

WEBCOM QUICK SUMS

Calculate defined computed fields over the important Entries pages much faster and easier!

WEBCOM Quick Sums allows users to work more comfortably over the important Entries pages. Instead of time-consuming export data to Excel to find the totals of entries through the Excel's features, this app allows to display the totals of defined fields directly on the system.



Webcom Quick Sums allows users to work more comfortably over the important tables with ledger entries (such as General Ledger Entries, Customers / Vendors Ledger Entries, Item Ledger Entries, etc.). Functionality allows you to display the totals of defined fields of a given table with ledger entries directly on the system.

Settings

Once you have installed the Quick Sums Extension into your Dynamics 365 Business Central, your system is setup by default and ready to go. A new action Quick Sum is available on any of the supported pages. There is also the possibility manage the settings for this feature.

Assisted Setup

The Quick Sums Extension has an Assisted Setup Wizard. To access this wizard open the Assisted Setup page locate the line for the Quick Sums setup. Click on the text, this will start the Assisted Setup Wizard. To use Quick Sums feature in Entries pages you must define computed fields. By the Quick Sums assisted setup you can remove the current settings and add the default setup of computed fields for all users. Finally, you can check the Quick Sums feature settings you have created.

The screenshot shows the 'Assisted Setup' page in Dynamics 365 Business Central. The page title is 'VIEW - ASSISTED SETUP'. It contains a table with the following data:

NAME	STATUS
Set up Quick Sums	Completed
Set up reporting data	Not Completed
Set up Azure Active Directory	Not Completed
Set up Intelligent Cloud	Not Completed
Set up VAT	Not Completed
Set up consolidation reporting	Not Completed
Set up cash flow forecast	Not Completed
Set up Dynamics 365 for Sales connection	Not Completed
Set up a payment approval workflow	Not Completed
Set up a customer approval workflow	Not Completed
Set up an item approval workflow	Not Completed
Set up email logging	Not Completed
Migrate business data	Not Completed
Set up your Business Inbox in Outlook	Not Completed

Manual Settings

If you select the manual setup option, you can also set up the Quick Sums feature or update the current settings. By this option, you can create a new definition of the computed fields for the supported tables and assign this definition only to a particular user or set it as a common one for all users..

Demonstration

This demonstration shows how to use the Quick Sums feature in Entries pages.

Scenario: The sales manager at Demo Company analyzes receivables and wants to know the total value of all invoices issued to customers within the European Union in the current year.

To understand how to use the Quick Sums feature, follow these steps.

1. In the Search box, enter "customer ledger entries", and then click the selected link.
2. On the Customer ledger entries page set up filters
 - a) Select Document Type filter and then, in the enter a value field, select Invoice,
 - b) Select Customer Posting Group filter and then, in the enter a value field, select EU,
 - c) Select Posting Date filter and then, in the enter a value field, enter date filter for current year
3. Now page Customer ledger entries shows all invoices issued to customers within the European Union in the current year
4. From the Navigate ribbon select the Quick Sum action
5. This action opens the Quick Sums View page, where the total amount of all the filtered entries is calculated. Moreover, additional values for all the computed fields you have defined for the table in the settings.

The screenshot shows the Dynamics 365 Business Central interface for the 'Customer Ledger Entries' page. The ribbon includes 'HOME', 'ACTIONS', and 'NAVIGATE'. The 'NAVIGATE' ribbon has a 'Quick Sum' button highlighted with a red arrow. The main area displays a table titled 'VIEW - CUSTOMER LEDGER ENTRIES' with the following columns: POSTING DATE, DOCUME... TYPE, DOCUMENT NO., PR..., PREPAY... TYPE, CUSTOMER NO., MESSAGE TO RECIPIENT, DESCRIPTION, and CURRENCY CODE. The table contains 15 rows of invoice data, with the first row highlighted in blue. On the left, there are filter controls for Document Type (set to 'Invoice'), Customer Posting Group (set to 'EU'), and Posting Date (set to '01/01/20..12/31/20').

POSTING DATE	DOCUME... TYPE	DOCUMENT NO.	PR...	PREPAY... TYPE	CUSTOMER NO.	MESSAGE TO RECIPIENT	DESCRIPTION	CURRENCY CODE
1/22/2020	Invoice	2809			49633663		Autohaus Mielberg KG 2020	EUR
1/21/2020	Invoice	2808			49633663		Autohaus Mielberg KG 2020	EUR
1/19/2020	Invoice	103024			46897889		Objednávka 101013	SEK
1/17/2020	Invoice	2804			49525252		Beef House 2020	EUR
1/17/2020	Invoice	103023			49633663		Objednávka 101006	EUR
1/15/2020	Invoice	103022			32656565		Objednávka 101003	EUR
1/11/2020	Invoice	103019			43687129		Objednávka 101011	EUR
1/6/2020	Invoice	2803			49525252		Beef House 2020	EUR
1/4/2020	Invoice	2802			49525252		Beef House 2020	EUR
1/3/2020	Invoice	2801			49525252		Beef House 2020	EUR
1/2/2020	Invoice	103014			49858585		Faktura 103014	EUR
1/2/2020	Invoice	103013			43687129		Faktura 103013	EUR
1/2/2020	Invoice	103012			43687129		Faktura 103012	EUR
1/2/2020	Invoice	103011			43687129		Faktura 103011	EUR

List of supported Pages

20	General Ledger Entries	573	Detailed Cust. Ledg. Entries
25	Customer Ledger Entries	574	Detailed Vendor Ledg. Entries
29	Vendor Ledger Entries	5237	Employee Ledger Entries
38	Item Ledger Entries	5238	Detailed Empl. Ledger Entries
92	Job Ledger Entries	5604	FA Ledger Entries
202	Resource Ledger Entries	5802	Value Entries
315	VAT Entries		



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