



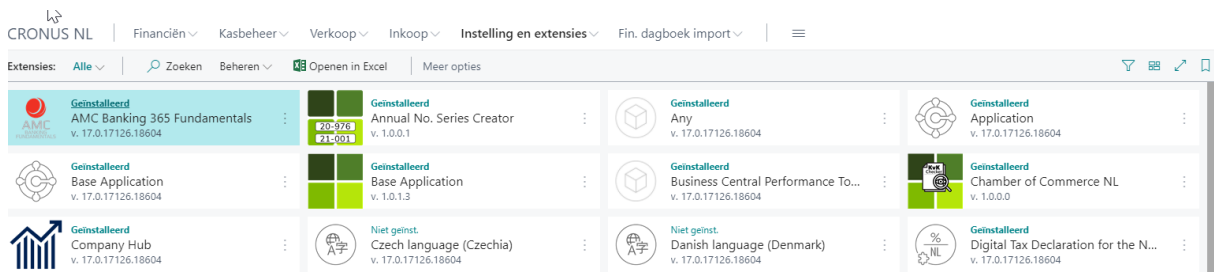
Annual No. Series Creator App

This document describes the functionality for the use of the “Annual No. Series” app, created by Micro Apps. The app is designed and developed to automatically create new no. series lines when a new fiscal year is created. This is done using a standard format for the no. series and by letting the user decide which no. series should be expanding when a new fiscal year has been created.

Installation:

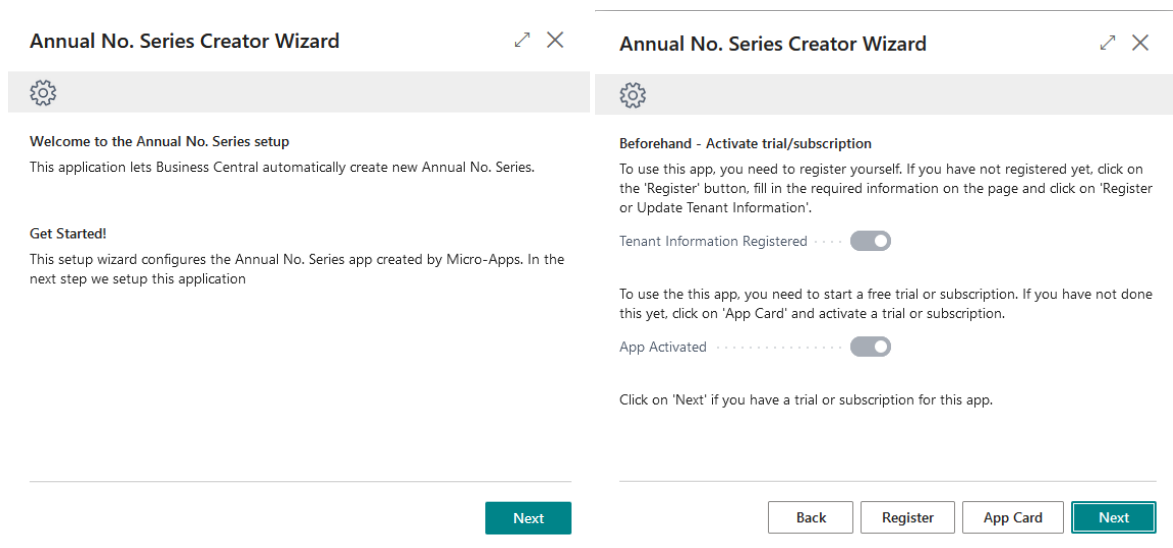
The installation of the Annual No. Series app is available via the Microsoft Marketplace for Business Central extensions/apps. From here you can automatically install the extension and make it available within every company within your Business Central environment.

For the correct working of the app, make sure that the setting of the Micro Apps Base App is set for “allowing HttpClient Request”.



Setup:

Before using the annual no. series creator, a the setup wizards need to be completed. This includes the creation of the no. series that will be used throughout the system. Start the wizard by opening the **Annual No. Series Creator Wizard**. The first step is to register yourself and to activate the trial or subscription. With the trial, you can use the app two weeks free of charge. After the trial period, you need to activate the subscription. Make sure both fields are checked (like the example in the picture at the right)



Using the toggle 'Create at new fiscal year' let you decide whether the new no. series lines need to be automatically created when a new fiscal year is created.

Annual No. Series Creator Wizard
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Using the toggle 'Create at new fiscal year' let you decide whether the new no. series lines need to be created when a new fiscal year is created.

Create at New Fiscal Year

Back
Next

No. series setup

To correctly use the annual no. series creator the no. series needs to be created. Click on the No. Series button and use the following setup <ABC><YEAR><NO.>, this should result in the following example no. series PSI2000001. Furthermore the option 'Create at new fiscal year' needs to be enabled to enable the Annual no. series creator to automatically create a new no. series line

Annual No. Series Creator Wizard
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No. Series Setup

To correctly use the annual no. series creator, the no. series needs to be setup using the following setup <ABC><YEAR><NO.>, this should result in the following example 'PSI2000001'. Furthermore the option 'Create at new fiscal year' needs to be enabled to enable the Annual no. series creator to automatically create a new no. series line.

Open the no. series setup page by clicking on the 'No. Series Setup' button.

Back
No. Series Setup
Next

NO. SERIES | WORK DATE: 4/6/2020

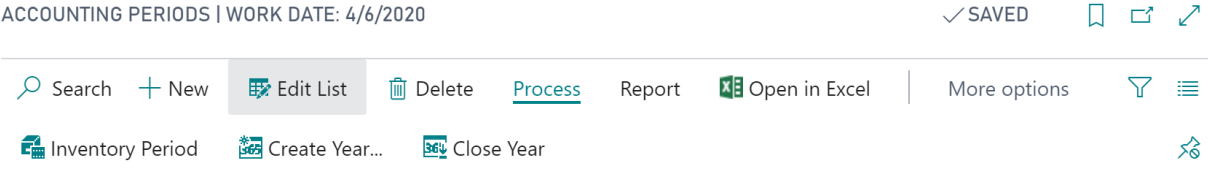
✓ SAVED 🔖 📄 ↗

🔍 Search + New 📝 Edit List 🗑 Delete 📍 Navigate 📄 Open in Excel 📍 Navigate ⋮ Fewer options

Code †	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Default Nos.	Manual Nos.	Date Order	Create at new fiscal year
SI	Sales Invoices	SI20000001	SI20999999	—	—	✓	✓	☐	✓
SI+	Posted Sales invoices	PSI20000001	PSI20999999	—	—	✓	✓	☐	✓

Create No. Series Automatically

When the toggle 'Create at new fiscal year' is enabled, the app automatically creates a new no. series line when a new fiscal year is created. To create a new fiscal year, Click on the accounting periods button and go to navigate → Accounting periods. On the account period page go to Process → Create Year... for creating a new fiscal year.



Next choose an desired starting date of the new fiscal year, this is normally the first of January, followed by the number of periods and the period length, these should be set to 12 and 1M (one month). By clicking OK the new fiscal year should be created and the corresponding no. series lines will be created.

CREATE FISCAL YEAR

Saved Settings

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

Options

Starting Date 1/1/2028


No. of Periods 12

Period Length 1M

Schedule... OK Cancel

The last step contains assigning the 'Annual No. Series' permission set. For every user that uses the Annual No. Series app and doesn't have super rights, you need to set the Annual No. Series' permission. Open the user overview page with the button, select the user and assign the "Annual No. Series" permission in the User Permission Sets tab. After this step you are done with the configuration.

Annual No. Series Creator Wizard




Permission Sets
The users of the app need additional permissions to use the app. Users with the 'super' permission set have sufficient permissions.

Set the permissionset
To add the necessary permissions to the user, open the user overview within Business Central. Then select the user who should have access to the app and assign the "Annual No. Series Creator" permission set.

[Back](#) [Open User Overview](#) [Next](#)

Annual No. Series Creator Wizard



The Configuration wizard has finished!
You are now able to use the Annual No. Series Creator app. To close this setup, choose Finish.

[Back](#) [Finish](#)