

EPLAN Interface

for Microsoft Dynamics 365 Business Central

and

EPLAN Plattform 2.8



EPLAN Interface

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What is EPLAN Interface

EPLAN Interface enables you to exchange data between your EPLAN Platform and Microsoft Dynamics 365 Business Central. As a result, it enables you to include your EPLAN projects into the planning functionalities of your ERP-System and to allocate them in Sales orders.

Preparations

Setup EPLAN

In EPLAN you have to configure an export of your data in txt format.

Furthermore, each item needs a free property in the following table “tblFreeProperty”, which will be used during the item creation in Microsoft Dynamics 365 Business Central.

Setup Microsoft Dynamics 365 Business Central

Role Center

The EPLAN Interface is integrated into the Business Manger role center.

EPLAN Item Setup Page

The Item setup page is used to preallocate important fields during the creation of items in Microsoft Dynamics 365 Business Central from EPLAN items. You can find it under **EPLAN > Import EPLAN item > Connection > Item setup (EPLAN)**

Here you can predefine values for the following fields:

-VAT product posting group

-General product posting group

-Inventory posting group

-Base unit of Measure

EPLAN Item Setup

general

VAT Prod. Posting Gro...	MWST.19	Inventory Posting Gro...	FERTIG
Gen. Prod. Posting Gr...	HANDEL	Inventory Posting Gro...	ROHMAT
Gen. Prod. Posting Gr...	ROHMAT	Base Unit of Measure	KG

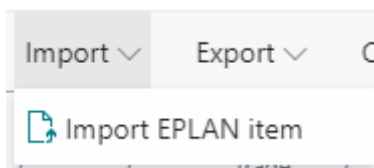
The fields **General product posting group 2** and **Inventory posting group 2** are used for alternative allocations. They are triggered by using a free item property in EPLAN

Functions

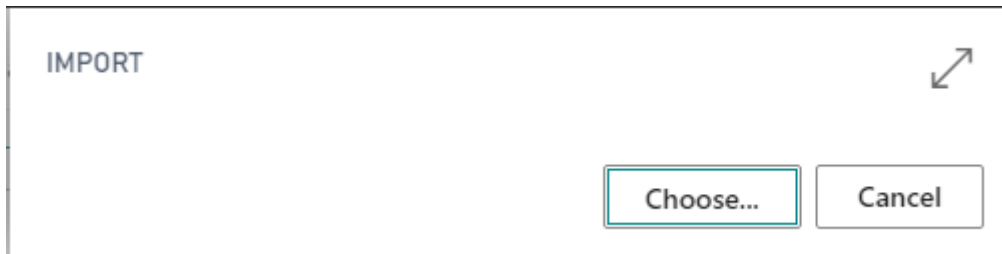
Import EPLAN item

To import an EPLAN item into Microsoft Dynamics 365 Business Central navigate to **EPLAN > Import EPLAN item**

In the Action bar select **Import > Import EPLAN item**



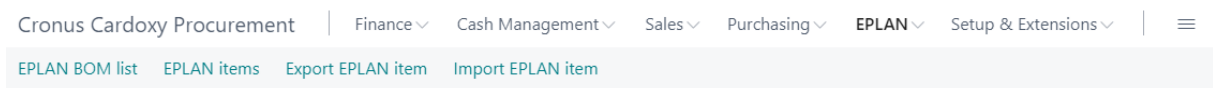
A window opens which prompts you to choose the file you want to import.



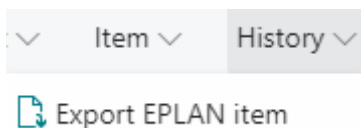
Clicking **Choose** opens your Explorer to browse to your file. After the file has been selected click **Open** and reload the page to show the imported items

Export EPLAN Item

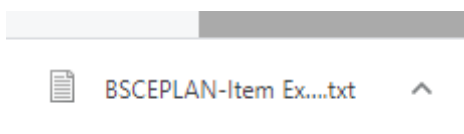
To export an Item from Microsoft Dynamics 365 Business Central, navigate to **EPLAN > Export EPLAN item**



In the action bar select **History > Export EPLAN item**

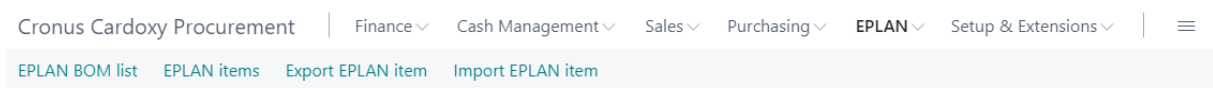


A txt file with the exported data is created



Create Item

Navigate to **EPLAN > Import EPLAN item**



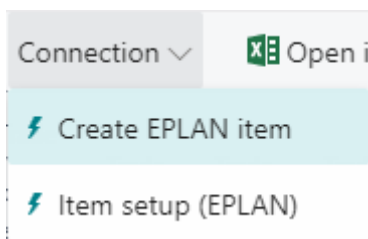
Before creating an item from an EPLAN item make sure that the **EPLAN Item Setup** is done.

EPLAN Item Setup

general

VAT Prod. Posting Gro...	MWST.19	Inventory Posting Gro...	FERTIG
Gen. Prod. Posting Gr...	HANDEL	Inventory Posting Gro...	ROHMAT
Gen. Prod. Posting Gr...	ROHMAT	Base Unit of Measure	KG

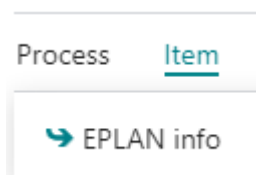
In the Action bar select **Connection > Create EPLAN Item**



, which opens the item card where you can now add further information.

Factbox EPLAN item data	
"Part type"	EPLAN020
Designation 1	testartikel
ERP number	90020
Trade / Electrical engineering	No
Trade / Fluid power	No
Trade / Mechanics	No
Trade / Process engineering	Yes
Trade / Hydraulics	No
Trade / Pneumatics	No
Trade / Lubrication	No
Trade / Cooling	No
Trade / Cooling lubricant	No
Trade / Gas engineering	No
Trade / Fluid power (undefine...	No
Certification / General	
Certification / UL	
Certification / VDE	
Certification / CE	
Weight	50.00

The action **EPLAN info** under **Item** opens a card with all the data imported from EPLAN



← ...ITEM DETAILS | WORK DATE: 27.01.2022  +  ✓ SAVED  

90020

Trade / Process engin...	☒	Certification / General	
Trade / Hydraulics	☐	Certification / UL	
Trade / Pneumatics	☐	Certification / VDE	
Trade / Lubrication	☐	Certification / CE	
Trade / Cooling	☐	Weight	50,00
Trade / Cooling lubric...	☐	Width	10,00
Trade / Gas engineeri...	☐	Height	30,00
Trade / Fluid power (...)	☐	Depth	20,00
Part number	90020	Space requirement	0,00
Discontinued part	☐	Mounting surface	0,00
ERP number	90020	External placement	☐
Type number	0	Graphical macro	
Designation 1	testartikel	Image file	
Designation 2		Center mismatch	0,00
Designation 3		Clip-on hight	0,00
Manufacturer	FIRMAA	Texture	
Supplier	FIRMAB	Mounting clearance ...	1,50
Order number	656565	Mounting clearance ...	1,50
Description		Mounting clearance ...	1,25
Price unit	0,00	Mounting clearance ...	1,25
Quantity unit		Mounting clearance ...	1,00

EPLAN item overview

To get a list of all your EPLAN items navigate to **EPLAN > EPLAN items**

Cronus Cardoxy Procurement | Finance ▾ | Cash Management ▾ | Sales ▾ | Purchasing ▾ | **EPLAN ▾** | Setup & Extensions ▾ | ≡

[EPLAN BOM list](#) | [EPLAN items](#) | [Export EPLAN item](#) | [Import EPLAN item](#)

EPLAN items: All ▾											
 Search  New  Delete Process ▾ Report ▾ Item ▾ History ▾ Request Approval ▾ Inventory ▾ Attributes ▾ 											
No. ↑	Description	Type	Inventory	Substi... Exist	Exp... to EPL...	Assem... BOM	Production BOM No.	Routing No.	Base Unit of Measure	Cost is Adj...	Uni
90020	testartikel	Inventory	0	No	☐	No			KG	☒	

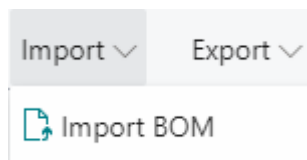
Import EPLAN BoM

Navigate to **EPLAN > EPLAN BoM list**

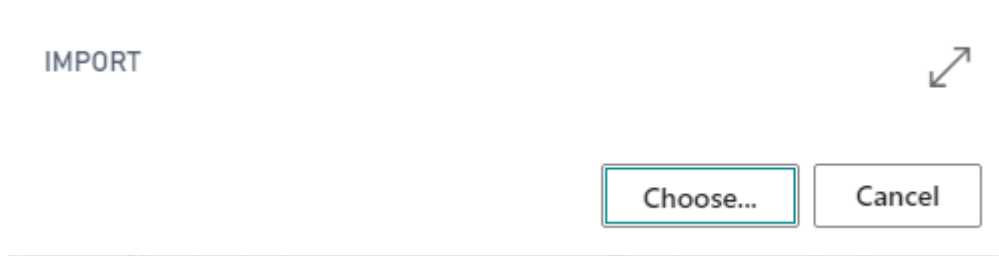
Cronus Cardoxy Procurement | Finance ▾ | Cash Management ▾ | Sales ▾ | Purchasing ▾ | **EPLAN ▾** | Setup & Extensions ▾ | ≡

[EPLAN BOM list](#) | [EPLAN items](#) | [Export EPLAN item](#) | [Import EPLAN item](#)

In the Action bar select **Import > Import BOM**



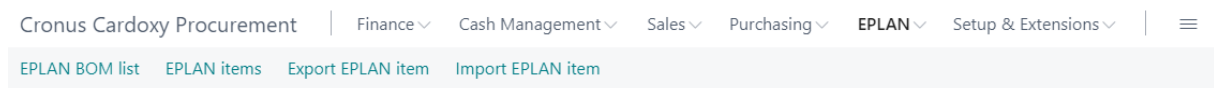
Click **Choose** and Select the file in the explorer



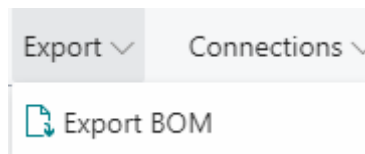
Finish the import by clicking on **Open**

Export EPLAN BoM

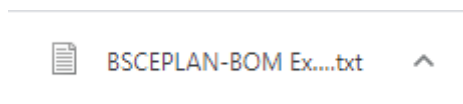
Navigate to **EPLAN > EPLAN BoM list**



In the Action bar select **Export > Export BOM**

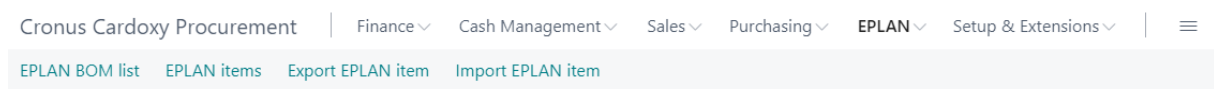


Which creates a txt file with the exported BOMs

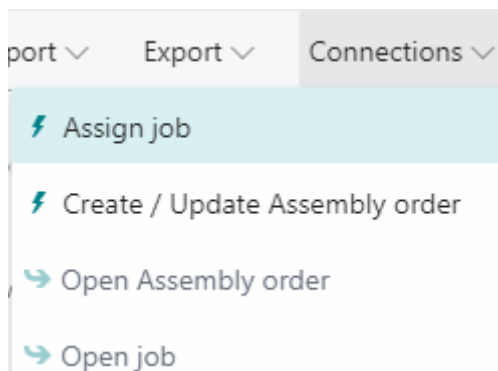


Create Assembly BoM

Navigate to **EPLAN > EPLAN BoM list**



In the action bar select **Connections > Create Assembly order**



Examples

Import EPLAN item data and create an EPLAN item

We start with the exported item data from EPLAN and import it into Microsoft Dynamics 365 Business Central

The txt file may look something like this

```
ItemImport-EPLAN.txt - Editor
Datei Bearbeiten Format Ansicht Hilfe
EPLAN030,object,test,version,,,,,true,,,,,90030,,90030,,testitem1,,,companyA,companyB,656565,,,,,100.00,,,,,125.00,,,,,50,10,30,20,,,,,1.5,1.5,1.25,1.25,1,1,,,,,3,,,,,
EPLAN031,object,test,version,,,,,true,,,,,90031,,90031,,testitem2,,,companyA,companyB,656565,,,,,100.00,,,,,145.00,,,,,50,10,30,20,,,,,1.75,1.75,1.5,1,1,,,,,3,,,,,
EPLAN031,object,test,version,,,,,true,,,,,90031,,90031,,testitem2,,,companyA,companyB,656565,,,,,100.00,,,,,145.00,,,,,50,10,30,20,,,,,1.75,1.75,1.5,1,1,,,,,3,,,,,
```

We navigate to **EPLAN > Import EPLAN item** and choose the action **Import > Import EPLAN item**. There we select the corresponding .txt file to import the data.

Cronus Cardoxy Procurement | Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾ **EPLAN ▾**

EPLAN BOM list EPLAN items Export EPLAN item Import EPLAN item

Import EPLAN item: All ▾ | 🔍 Search + New Manage ▾ Import ▾ Export ▾

📄 Import EPLAN item

"Part type"	Generic product group	Product group	Product subgroup	Trade / Elec... engl...	Trade / Fluid pow...	Trade / Mec...	Trade / Pro... engl...	Trade / Hyd...	Trade / Pne...	Trade / Lub...	Trade / Coo...	Trade / Gas engl...	Trade / Fluid pow...	Part number
EPLAN030	object	test	version	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	90030
EPLAN031	object	test	version	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	90031

Before we continue we have to ensure that the item setup fields have the correct settings. The **item setup (EPLAN)** is found under **Connection**

Export ▾ Connection ▾

⚡ Create EPLAN item

⚡ Item setup (EPLAN)

EPLAN Item Setup

general

VAT Prod. Posting Group	MWST.19	▼
Gen. Prod. Posting Group	HANDEL	▼
Gen. Prod. Posting Group 2	ROHMAT	▼
Inventory Posting Group	FERTIG	▼
Inventory Posting Group 2	ROHMAT	▼
Base Unit of Measure	KG	▼

Now we need to click on **Create EPLAN item** which creates an item from all unprocessed EPLAN item data.

After the process is finished the last processed item card opens

ITEM CARD | WORK DATE: 27.01.2022

90031 · testitem2

Process	Item	History	Special Sales...es & Discounts	Request Approval	Actions	Navigate	
---------	------	---------	--------------------------------	------------------	---------	----------	--

Item
Show more

No.	90031	...	Base Unit of Meas...	KG	▼
Description	testitem2		Item Category Code	▼	
Blocked	☐		EPLAN item	☒	
Type	Inventory		Export to EPLAN	☐	

On the item Card under **Item > EPLAN info** we can review every information which was imported from EPLAN.

Cronus Cardoxy Procurement | Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾ **EPLAN ▾**

EPLAN BOM list EPLAN items Export EPLAN item Import EPLAN item

EPLAN BOM list: All ▾ | 🔍 Search + New Manage ▾ Import ▾ Export ▾

Higher-level function (main identifier) Higher-level function Mounting location DT (superior, without project structure) Part number Component item description

DT	Higher-level function (main identifier)	Higher-level function	Mounting location (main identifier)	Mounting location	Object identificati...	DT (superior, without project structure)	Part number	Component item description
Distributionbox...	:				100	90019		–
Distributionbox...					100		80001	Computer III 533 MHz
Distributionbox...					100		80002	Computer III 600 MHz
Distributionbox...					100		80003	Computer III 733 MHz
Distributionbox...					100		80004	Computer III 800 MHz

In the next step we connect our EPLAN BOMs within Microsoft Dynamics 365 Business Central.

The first action is to create Assembly orders for the EPLAN BOMs by selecting **Connections > Create Assembly order** in the action bar.

Connections ▾ Open in Excel

- ⚡ Assign job
- ⚡ Create / Update Assembly order
- ➡ Open Assembly order
- ➡ Open job

If the process is finished the number of the created **Assembly order** is entered in each **EPLAN BOM Data line**

DT	DT (superior, without project structure)	Part number	Component item description	Number of units / quantity	Quantity (placed)	Quantity (unplaced)	Imp...	ID ↑	Assembly order no.
Distributionbox...	90019	–		0	0	0	☑	1	M00002
Distributionbox...		80001	Computer III 533 MHz	22	0	0	☑	2	M00002
Distributionbox...		80002	Computer III 600 MHz	22	0	0	☑	3	M00002
Distributionbox...		80003	Computer III 733 MHz	22	0	0	☑	4	M00002
Distributionbox...		80004	Computer III 800 MHz	22	0	0	☑	5	M00002

The next action is to assign them to a job **Assign Job**

No. ↑	Description
BÄDERWELT, 10 KR	Zehn Konferenzräume einrichten
LANDSBERG, 8 AP	Acht Arbeitsplätze einrichten

Selecting the matching job and entering the **EPLAN project No.** in the general tab

BÄDERWELT, 10 KR · Zehn Konferenzräume einrichten

Process		Report		Prices		WIP		Navigate		Job		Print/Send		More options	
General Show more															
No.	BÄDERWELT, 10 KR					Blocked					▼				
Description	Zehn Konferenzräume einrichten					Last Date Modified					10.06.2020				
Bill-to Customer No.	50000					Project Manager					▼				
Bill-to Contact No.	KT000016					EPLAN project No.					100				
Bill-to Name	Harburger Bäderwelt					EPLAN project description					DistributionboxSmall				
Person Responsible	MARLIES														

Now we can navigate from the Assembly order to the bom list and the job

From the job to the assembly order and the bom list

And from the bom list to the assembly order and the job

M00002 · DistributionboxSmall

Process		Release		Warehouse		Posting		Print		Navigate		Order		More options	
General															
No.	M00002					Due Date					21.06.2020				
Item No.	90019					Starting Date					20.06.2020				
Description	DistributionboxSmall					Ending Date					20.06.2020				
Quantity	1					Remaining Quantity					1				
Quantity to Assemble	1					Assembled Quantity					0				
Unit of Measure Code	KG					Assemble to Order					No				
Posting Date	27.01.2022					Status					Open				

Lines	Manage	More options									
Avail. Warn...	Type	No.	Description	Variant Code	Location Code	Unit of Measure Code	Quantity per	Quantity	Quantity to Consume	Consumed Quantity	
→ Yes	Item	80001	Computer III 533 MHz			STÜCK	0	22	0	0	
Yes	Item	80002	Computer III 600 MHz			STÜCK	0	22	0	0	
Yes	Item	80003	Computer III 733 MHz			STÜCK	0	22	0	0	
Yes	Item	80004	Computer III 800 MHz			STÜCK	0	22	0	0	

The last connection to establish is the EPLAN project with the corresponding sales order.

By selecting the respective **EPLAN project No.** in the sales lines

SALES ORDER | WORK DATE: 27.01.2022



1006 · Spotsmeyer's Furnishings

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General

No.	1006	...	Order Date	
Customer Name	Spotsmeyer's Furnishings	...	Due Date	
Contact	Mr. Mike Nash	...	Requested Delivery Date	
Posting Date	27.01.2022		External Document No.	

Lines Manage More options

Type	No.	Description	EPLAN project No.	EPLAN project description	Location Code
→ Item	90019	DistributionboxSmall	100	DistributionboxS...	GELB

You can now open the corresponding EPLAN BOM by going to the Lines action bar and selecting **Line > Related Information > EPLAN > EPLAN BOM**.

 Lines Manage Line Order Fewer options

Functions ▾
 Item Availability by ▾
 Related Information ▾

→ Item	90019		

- Reservation Entries
- Item Tracking Lines
- Select Item Substitution
- Dimensions
- Comments
- Item Charge Assignment
- Order Promising
- Attachments
- Assemble to Order >
- Document Line Tracking
- Deferral Schedule
- EPLAN > EPLAN BOM**

Subtotal Excl. VAT (USD)		0,00	Ti
Inv. Discount Amount Excl. VAT (USD)		0,00	Ti
Invoice Discount %		0	Ti

Invoice Details

Currency Code	USD		
Prices Including VAT	☒		
VAT Bus. Posting Group	EXPO		