

User Manual

Aptean Food and Beverage ERP

Advanced Comments

Product Documentation



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Release notes

Article • 7/22/2026 • 2 min read

To view what's new or changed in each release of the Aptean Advanced Comments extension, select the specific release version.

Date	Release version	Description
July 2026	2601.0.0.0	Major release
February 2026	2503.2.0.0	Stability release
November 2025	2503.1.0.0	Stability release
October 2025	2503.0.0.0	Feature release
August 2025	2502.1.0.0	Platform release
July 2025	2502.0.0.0	Feature release
July 2025	2501.1.0.0	Stability release
April 2025	2501.0.0.0	Feature release
April 2025	2403.5.0.0	Stability release
April 2025	2403.4.0.0	Stability release
December 2024	2403.3.0.0	Stability release
September 2024	2403.2.0.0	Stability release
August 2024	2403.1.0.0	Stability release
August 2024	2403.0.0.0	Feature release
July 2024	2402.1.0.0	Stability release
June 2024	2402.0.0.0	Feature release
June 2024	2401.3.0.0	Stability release
June 2024	2401.2.0.0	Stability release
May 2024	2401.1.0.0	Stability release
May 2024	2401.0.0.0	Feature release



April 2024	2301.10.0.0	Stability release
April 2024	2301.9.0.0	Stability release
April 2024	2301.8.0.0	Stability release
March 2024	2301.7.0.0	Stability release
March 2024	2301.6.0.0	Stability release
February 2024	2301.5.0.0	Stability release
December 2023	2301.4.0.0	Stability release
December 2023	2301.3.0.0	Stability release
November 2023	2301.2.0.0	Stability release
October 2023	2301.1.0.0	Stability release
August 2023	1.16.113808.0	Stability release
July 2023	1.15.108318.0	Stability release
May 2023	1.14.99077.0	Stability release
May 2023	1.13.97169.0	Stability release
April 2023	1.12.95340.0	Stability release
April 2023	1.11.90271.0	Stability release
March 2023	1.10.87313.0	Stability release
March 2023	1.9.86845.0	Stability release
January 2023	1.8.76114.0	Stability release
January 2023	1.7.74641.0	Stability release
October 2022	1.6.64300.0	Stability release
October 2022	1.5.63399.0	Feature release
August 2022	1.4.56352.0	Stability release
August 2022	1.4.55974.0	Stability release
May 2022	1.4.47324.0	Stability release



2601.0.0.0

Release Note • 7/22/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, the system has been updated to ensure interoperability with the recent changes in the Aptean [E-Commerce](#) extension, which stores customer checkout comments as sales comment lines and can print them on order confirmations and delivery notes through this extension. To know more, see [What's new in E-Commerce, version 2603.0.0.0](#).



2503.2.0.0

Release Note • 2/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, the *OnInsertRecord* trigger has been added to specific sales document pages to ensure correct formatting of sales comments when creating a sales return order or other sales documents with a prepopulated customer (for example, when using filters). This enhancement addresses the issue reported in bug ID #349988.

Resolved issues

The following issue has been resolved in this release.

ID	Description
349988	The system fails to format sales comments correctly when creating a sales document with a prepopulated customer.



2503.1.0.0

Release Note • 11/26/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, the translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



2503.0.0.0

Release Note • 10/22/2025 • 1 min read

Features

With the features added in this release of the Aptean Advanced Comments extension, you can access and manage standard comments directly from the **Customer Card** and **Vendor Cards** pages, print standard comments on quality certificates. For more information, see [Set up standard comments](#).

UI/UX changes

The following UI/UX changes have been made in this release:

- The **Standard Comments** action has been added to the following pages:
 - Customer Card
 - Vendor Card
- The **Comments** field has been added to the **Quality Control Summary** report.



2502.1.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, the *ObsoleteState* property of the **Copy to Document** field has been updated to *Removed* on the *StandardCommentFDW* table as part of a code cleanup activity.



2502.0.0.0

Release Note • 7/2/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Comments extension, you can configure whether comments from sales return orders and purchase return orders appear on the related warehouse shipments and warehouse receipts, making important information easily accessible to warehouse teams.

UI/UX changes

The **Show in Warehouse Document** checkbox has been added to the following pages:

- **Sales Comments View** (for sales return orders)
- **Comment Sheet** (for sales return orders and purchase return orders)



2501.1.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, the translation file for the Chinese (zh-CN) language has been added.



2501.0.0.0

Release Note • 4/29/2025 • 1 min read

Features

With the feature added in this release of the Aptean Advanced Comments extension, the advanced comments functionality has been enhanced to support multilingual comments on printed documents. You can add and manage translations for advanced comments, allowing comments to be displayed in the customer language setting when printed. To know more, see [Translate standard comments](#).

UI/UX changes

The following UI/UX changes have been made.

- The **Translation Standard Comments List** and **Translation Standard Comments** pages have been added.
- The **Translations** action has been added to the **Standard Comments** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
263171	The system deletes purchase comments incorrectly after the first print of the purchase order report.



2403.5.0.0

Release Note • 4/25/2025 • 1 min read

Enhancements/Modifications

The translation files for the Swedish (sv-SE) language have been updated with standard texts for better readability.



2403.4.0.0

Release Note • 4/9/2025 • 1 min read

UI/UX changes

The redundant **Notify User** checkbox has been removed from the **Comment Sheet** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
272022	The system incorrectly displays two Notify User checkboxes on the Comment Sheet page.



2403.3.0.0

Release Note • 12/2/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, when the Aptean Reporting extension is installed, the standard purchase and sales comments are copied from **Purchase Order** and **Sales Order** pages respectively to the **Transport Order** page and these comments are also printed in the transport order reports. To know more, see [What's new in Reporting, version 2402.14.0.0](#).

Integrations

The Aptean Advanced Comments extension has been integrated with the Aptean [Reporting](#) extension.



2403.2.0.0

Release Note • 9/24/2024 • 1 min read

Enhancements/Modifications

The translation files for the Danish (da-DK) language have been updated with standard texts for better readability.



2403.1.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.
- Enhancements have been made to update the process within the application to handle the *User Group* and *User Group Permission Set* tables. This change ensures compatibility with current and future versions of Business Central, even when the *User Group* and *User Group Permission Set* tables are deprecated.

! Note

The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.



2403.0.0.0

Release Note • 8/20/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the Aptean Shop Floor Production extension. To know more, see [What's new in version 2404.0.0.0](#).



2402.1.0.0

Release Note • 7/19/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
219313	The system incorrectly displays the sales comments from the Sales Order page on the Released Production Order page, even when the production order was not created from the related sales order.



2402.0.0.0

Release Note • 6/26/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Commodity Harvest Planning extension. To know more, see [What's new in version 2401.0.0.0](#).



2401.3.0.0

Release Note • 6/24/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
208617	The system fails to add comments to the Purchase Comments field when an item deleted from a purchase order line is re-added. This issue occurs when a purchase order is created from a purchase quote via the Make Order action.



2401.2.0.0

Release Note • 6/19/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
207699	The standard comments are not populated on the Purchase Comment View page when the Copy to Document Type field is set as <i>Order</i> on the Standard Comments page. This issue occurs when a purchase order is created from a purchase quote.



2401.1.0.0

Release Note • 5/29/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
205080	When you create a sales order from the Sales Quote page, the Sales Comments field value on the Sales Order page does not match with the relevant value displayed on the Standard Comments page. This occurs if the Copy to Document Type field is set to <i>Order</i> and the Item Type field is set to <i>All Items</i> on the Standard Comments page.



2401.0.0.0

Release Note • 5/15/2024 • 1 min read

Features

With the features added in this release of the Aptean Advanced Comments extension, you can copy the sales and purchase comments to posted documents. To know more, see [Copy comments to posted documents](#).

Integrations

You can use the Aptean Advanced Comments extension in conjunction with the Aptean [Combine Shipment per Period](#) extension to copy comments from your sales order to the sales invoice when combining shipments in your system. To know more, see [Copy comments from sales order to sales invoice with combine shipment](#).

UI/UX changes

The following UI/UX changes have been made in this release:

- The **Sales Comments** and **Purchase Comments** actions are added to the sales return, purchase return, and the associated posted return documents.
- The **Copy Comments Shpt. to Invoice** and **Copy Comments Ret. Rcpt. to Cr. Memo** toggles are added to the **Sales & Receivables Setup** page.



2301.10.0.0

Release Note • 4/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
194323	When a production order is created from the Planning Worksheet page and the released production order is opened in the Shop Floor Production Power App, the related sales comments are deleted.



2301.9.0.0

Release Note • 4/30/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension, you can:

- Edit or delete the comments on the **Sales Comments View** and **Purchase Comments View** pages.
- View the starting and ending date of the comments on the **Sales Comments View** and **Purchase Comments View** pages.

UI/UX changes

The following UI/UX changes have been made in this release:

- The **Edit** and **Delete** actions are added to the **Sales Comments View** and **Purchase Comments View** pages.
- The **Starting Date** and **Ending Date** fields are added to the **Sales Comments View** and **Purchase Comments View** pages.



2301.8.0.0

Release Note • 4/17/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
192179	An error occurs while selecting the Sales Comments field value on the Released Production Order page to open the Sales Comments. This arises when the associated production order is created for multiple sales orders from the Planning Worksheet page.



2301.7.0.0

Release Note • 3/28/2024 • 1 min read

UI/UX Changes

- The **Source Document Comments** field on the **General** FastTab is moved to the **Source Document Comments** FactBox on the **Warehouse Shipment** page.

Resolved issues

The following issue has been resolved in this release:

ID	Description
178452	A performance issue occurred while accessing the Warehouse Shipment page.



2301.6.0.0

Release Note • 3/6/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Advanced Comments extension,

- The issues arising from the indirect permission set have been effectively resolved to ensure the seamless functionality of the extension.
- Selected captions and tooltips have been curated to eliminate any spelling errors and improve readability in the French version (fr-FR).



2301.5.0.0

Release Note • 2/7/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
175177	Performance issue occurs on the Warehouse Receipt page while executing the Source Document Comments action with multiple source documents.



2301.4.0.0

Release Note • 12/27/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
154271	Performance issue occurs due to the use of the COUNT function in the existing code.



2301.3.0.0

Release Note • 12/13/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
163840	The tooltip of the Item Type field on the Standard Comments page does not provide the correct information.



2301.2.0.0

Release Note • 11/15/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
155691	Performance issues occur when displaying the sales comments on the Sales documents.



2301.1.0.0

Release Note • 10/4/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean [Trade Management](#) extension. To know more, see [What's new in version 2301.1.0.0](#).



1.16.113808.0

Release Note • 8/21/2023 • 1 min read

Resolved Issues

The following issue has been resolved in this release:

ID	Description
139062	An error occurs while attempting to change the Customer Name on the Sales Order page, and the system fails to inherit the associated Sales Comments from the Standard Comments page.



1.15.108318.0

Release Note • 7/12/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
131941	On the Standard Comments page, after saving a new entry, the system restricts the user from editing the Notify User , Show in Warehouse Document , and Show in Production Order fields.



1.14.99077.0

Release Note • 5/19/2023 • 1 min read

Resolved Issues

The following issues have been fixed in this release:

ID	Description
118813	When a Ship-to Address with a blank code is deleted in the Ship-to Address List , the headers on Standard Comments for the <i>Customer</i> Source Type are deleted on the Source Comments page.



1.13.97169.0

Release Note • 5/9/2023 • 1 min read

Resolved Issues

The following issue has been resolved in this release:

ID	Description
116364	An error occurs on the Customer Card page when the user tries to create a sales order using the New Document action.



1.12.95340.0

Release Note • 4/29/2023 • 1 min read

Resolved Issues

The following issue has been resolved in this release:

ID	Description
114457	When trying to open a production order with low inventory and multiple sales orders, an error message is displayed: <i>The string length is 29, which exceeds the maximum limit of 20 characters.</i>



1.11.90271.0

Release Note • 4/3/2023 • 1 min read

Resolved Issues

The following issues have been fixed in this release:

ID	Description
108842	Unable to create purchase order directly from the Blanket Purchase Order when the standard comments exist for the selected vendor.
110442	The comments for the lines associated with the selected item or item category are not copied to the document lines when the Item No. is selected on the Blanket Purchase Order lines.
111177	The comments for the lines associated with the selected item or item category are not copied to the document lines when the Item No. is selected on the Purchase Invoice and Purchase Credit Memo lines.



1.10.87313.0

Release Note • 4/3/2023 • 1 min read

Resolved Issues

The following issues have been fixed in this release:

ID	Description
96673	On the Config.Package Card page, an error message is displayed stating that the user does not have SUPER permission despite having the necessary permission.
101710	The comments added on the Purchase Return Order page are automatically deleted after the document is printed.



1.9.86845.0

Release Note • 4/3/2023 • 1 min read

Resolved Issues

The following issue has been fixed in this release:

ID	Description
99997	The Notify User , Show in Warehouse Document , and Show in Production Order checkboxes are not editable on the Standard Comments page.



1.8.76114.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made for the Aptean Advanced Comments extension to work seamlessly with the Aptean Foundation Layer extension. This extension holds all the standard table values of the Advanced Comments extension.



1.7.74641.0

Release Note • 4/3/2023 • 1 min read

Resolved Issues

The following issue have been addressed in this release:

ID	Description
71700	A typo Notificate User is displayed instead of Notify User in the environment.



1.4.56352.0

Release Note • 4/3/2023 • 1 min read

Enhancements / Modifications

Minor technical changes were made:

- To seamlessly work with the Aptean [Integration Layer](#) extension.
- To seamlessly work with the Aptean Foundation Layer extension. This extension holds all the standard table values for its dependent extensions.



1.6.64300.0

Release Note • 4/3/2023 • 1 min read

Resolved Issues

The following issue has been fixed in this release:

- The standard comments are automatically deleted after posting the sales or purchase documents.



1.5.63399.0

Release Note • 4/3/2023 • 1 min read

Features

The following features are included in this release of the Aptean Advanced Comments extension.

- You can create standard purchase comments that are automatically added when creating the purchase documents (and the warehouse documents associated with purchase documents). Previously, you could only create standard sales comments that can be added automatically to the sales documents (and warehouse documents associated with sales documents) as they are created. For more information, see [Show Standard Comments in Sales and Purchase documents](#).
- When the warehouse documents (shipment, receipt and pick) have multiple source documents, the comments per document are indicated and can be viewed. For more information, see [Show standard comments in Warehouse documents](#).
- While deleting the master data, such as a vendor, customer, item and item category code, the standard comments that are assigned to that master data are also deleted.



1.4.55974.0

Release Note • 4/3/2023 • 1 min read

Resolved Issues

The following issues have been addressed in this release:

ID	Description
48178	Opening Pick throws an error when creating Warehouse Pick from a Warehouse Shipment with multiple Source Document Numbers.
48176	The sales comments are missing when converting a Sales Quote to a Sales Order via the Make Order function.



1.4.47324.0

Release Note • 4/3/2023 • 1 min read

Enhancements / Modifications

The enhancements in this release are listed below:

- A localized version of Advanced Comments extension is made available for the Switzerland market with the addition of German language code [de-CH].
- Minor technical changes to keep our apps in line with *updated* coding guidelines for Business Central.



Introduction

Article • 4/3/2023 • 2 min read

The Aptean Advanced Comments (ACM) extension allows adding extra information to documents to communicate exceptions or special information to users, vendors, and customers. With the Advanced Comments extension, you can create standard sales and purchase comments that will automatically be added to sales and purchase documents (and to documents connected to sales and purchase documents) when they are created. An example of a standard comment could be: "Merry Christmas" during the holidays or a comment for the warehouse employee as "Don't forget to add an extra label".

Setting up which comments should appear on which document is possible on the **Standard Comments** page. It is possible to include comments on either the document header or specific sales and purchase document lines. Standard comments for the header can be set up for all customers and vendors, a specific customer and vendor, or a customer or vendor combined with a ship-to address or order address. Standard header comments can also be set up for customers or vendors with a specific country code. Standard line comments can be set up for all items, an item category, or a specific item.

You can configure a notification to inform a user when significant comments for a document become available. This notification is displayed when a sales and purchase document is opened and the standard comments exist.



Setup

Article • 7/30/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up standard comments](#)



Manage permission sets

Article • 7/30/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *ADVANCEDCOMMENTSFDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *ADVCOMMENTS_BASICFDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see [Assign permissions to users and groups](#).

Assign a permission set

1. Select the Search icon , enter **Users**, and then choose the related link.
The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
The **User Card** page opens.
3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.



Advanced Comments

The associated fields are automatically updated based on the entered value. The user has the necessary permissions to use the features of the Aptean Advanced Comments extension, ensuring secure and role-based access.



Set up standard comments

Article • 10/22/2025 • 7 min read

You can set up comments on the **Standard Comments** page which are copied to purchase and sales documents when the settings match with the information provided in the purchase or sales documents.

To setup a standard comment:

1. Select the Search icon , enter **Standard Comments**, and then choose the related link.
The **Standard Comments** page opens.
2. On the action bar, click **New** to create a new record.
3. Fill in the fields as necessary.
4. On the action bar, select the **Edit Text Lines** to add a comment text to the header.
5. On the **Comment Text Lines** page, in the **Comment Text** field, enter one or more comments text lines.
6. Go back to the **Standard Comments** page.
For each standard comment, the comment text lines are displayed on this page under the **Comment Text Lines** FastTab. However, you can edit or create a comment text line by using the **Edit Text Lines** action.

Standard Comment for document headers

1. On the **Standard Comments** page, click **New** on the action bar to create a new record.
2. In the **Source Type** field, select the type to which the comment applies. The options in the list are 'Customer', 'All Customers', 'Vendor', and 'All Vendors'.
Only when the source types 'All Customers' or 'All Vendor' are chosen, and then only you can select a country code to specify the country to which the comment applies.

Note

As described in the [Modification to Customer/Vendor/Item/Item Category Code](#) topic, when you change or delete the customer/vendor or any fields related to the customer/vendor, the complete record is updated/ deleted.

3. In the **Source Number** field, select the number of the source to which the comment applies.
4. In the **Source Sub No.** field, select the number of the Customer Ship-to or Vendor Order Address to which this comment needs to apply.
The document type that is selected specifies which type of document(s) comment is copied. From the selected document, the comment is copied to all subsequent purchase and sales documents, e.g., from order to credit memo. It depends on the **Sales & Receivables Setup** and **Purchase & Payable Setup** pages whether the comment is also copied to posted documents.



5. In the **Copy to Document** Type field, select the document type to which the comments are copied to. The options are *Order*, *Quote*, *Blanket Order*, *Invoice*, *Credit Memo*, and *All*.

- If you select *All*, the comments will be copied to all document types.
- If you leave this field blank, the comments will not be copied. However, you can still choose to show or print them on the related documents by selecting the relevant checkboxes in the line. Depending on your choice, the comment will appear only on the selected documents.

Note

The feature of displaying comments on printed documents is only available when the [Aptean Reporting extension](#) is installed.

6. In the **Starting Date** field, select the start date for which the comment is applicable and from when the comment should be copied to the documents. The comment is always copied to the documents if no starting date is specified.

Note

The comments are copied to the document if the Work Date is greater than or equal to the Starting Date.

7. In the **Ending Date** field, select the end date for which the comment is applicable and until when the comments should be copied to the documents.

Note

- The comments are copied to the document if no Ending Date is specified.
- The comments are copied to the document if the Work Date is less than or equal to the Ending Date.

8. Select the **Notify User** checkbox to notify a document in which a comment is copied.

9. Select the relevant checkboxes, such as the **Show in Warehouse Document** or **Show in Production Order**, if the comment should be shown in the related documents. Depending on the selected document type, you can select the checkboxes for the different documents.

10. Select the relevant checkboxes, if the comment should be printed in the related documents. The comments can be printed on the following documents:

- Blanket Order
- Quote
- Order Confirmation
- Delivery Note



- Invoice
- Return Order
- Credit Memo
- Transport Order

Standard Comment for document lines

It is also possible to create standard comments that are copied to the document lines. In that case, selecting a source type and an item type is necessary.

1. On the **Standard Comments** page, click New to create a new record.
2. In the **Source Type** field, select to which source type the comment applies from the list.
Only when the source types '*All Customers*' or '*All Vendor*' are chosen and then it is possible to select a country code to specify the country to which the comment applies.

Note

As described in the [Modification to Customer/Vendor/Item/Item Category Code](#) topic, when you change or delete the customer/vendor or any fields related to the customer/vendor, the complete record is updated/deleted.

3. In the **Source Number** field, select the number of the source to which the comment applies.
4. In the **Source Sub No.** field, select the number of the Customer Ship-to or Vendor Order Address to which this comment needs to apply.
5. In the **Item Type** field, select to which item type the comment applies from the list. The options are '*Item*', '*Item Category*', and '*All Items*'.
6. In the **Item No.** field, select the item number or item category code depending on the chosen Item Type.
The document type that is selected to specifies which type of document(s) comment is copied. From the selected document, the comment is copied to all subsequent purchase and sales documents, e.g., from order to credit memo. It depends on the **Sales & Receivables Setup** and **Purchase & Payable Setup** pages whether the comment is also copied to posted documents.

Note

As described in the [Modification to Customer/Vendor/Item/Item Category Code](#) topic, when you change or delete the item/item category code or any fields related to the item/item category code, the complete record is updated/deleted.

7. In the **Copy to Document Type** field, select the document type to which the comments are copied to. The options are *Order*, *Quote*, *Blanket Order*, *Invoice*, *Credit Memo*, and *All*.



- If you select *All*, the comments will be copied to all document types.
- If you leave this field blank, the comments will not be copied. However, you can still choose to show or print them on the related documents by selecting the relevant checkboxes in the line. Depending on your choice, the comment will appear only on the selected documents.

8. In the **Starting Date** field, select the start date for which the comment is applicable and from when the comment should be copied to the documents. The comment is always copied to the documents if no starting date is specified.

 Note

The comments are copied to the document if the Work Date is greater than or equal to the Starting Date.

9. In the **Ending Date** field, select the end date for which the comment is applicable and until the comments should be copied to the documents.

 Note

- The comments are copied to the document if no Ending Date is specified.
- The comments are copied to the document if the Work Date is less than or equal to the Ending Date.

The **Standard Comments** page opens when you execute the **Standard Comments** action on the **Customer Card** and **Vendor Card**, displaying all standard comments associated with the selected vendor or customer. From this page, you can create, edit, or delete standard comments. The standard comments created on this page is printed on the quality report.

Modification to Customer/Vendor/Item/Item Category Code

The associated standard comments are deleted when you:

- Delete a Customer
- Delete a Vendor
- Delete a Customer Ship-To Code
- Delete a Vendor Order Address
- Delete an Item
- Delete an Item Category Code



Show standard comments in sales and purchase documents

Article • 7/2/2025 • 9 min read

You can copy the standard comments to all the sales and purchase documents:

The documents to which the standard comment is copied depend on the document type that is selected on the **Standard Comments** page. When the comment applies to an item or item category, the comment is copied to the document line, otherwise to the document header.

In Microsoft Dynamics Business Central, it is possible to open a comment page for the document header and a comment page for each document line. For a better overview, in the Advanced Comments extension, a **Sales Comments** page and **Purchase Comments** page are added, where all comments are shown together for both the document header and all document lines.

Note

The standard comments work for all sales and purchase documents, and the below description is the same for all the documents.

To view the standard comments on the sales order:

1. Select the search icon , enter **Sales Orders** and then select the related link.
The **Sales Orders** page opens.
2. Select the **New** menu in the action bar to create a new record.
3. In the **Customer Name** field, select the customer number to which the comment is linked.
After selecting the sell-to customer, the comments for the header, linked to the customer, are copied to the document. You can see the number of comments linked to this customer in the **Sales Comments** field, e.g., "1".
4. In the **Ship-to** field, select the **Alternate Shipping Address** option from the list.
5. In the **Code** field, select the alternate shipping address code for which the comment is linked.
After selecting the alternate shipping address, the comments linked to this ship-to address are copied to the document. You can see the number of comments in the **Sales Comments** field, e.g., "2".
6. For the sales order lines, in the **Type** field, select the type **Item** from the list.
7. In the **No.** field, select the item number to which the comment is linked.
After selecting the item(s) on the order lines, the comments for the lines linked to the item or item category are copied to the document. You can see the number of comments in the **Sales Comments** field, e.g., "3".



Show notification in the Sales and Purchase documents

For those comments for which the **Notify User** checkbox is selected on the **Standard Comments** page, a related notification appears in a blue bar at the top of the sales and purchase documents, and the text in the **Sales Comments** or **Purchase Comments** field turns red. And the text "**Important**" is added when the comment (for which the **Notify User** checkbox is selected) is copied.

The notification is shown when a comment (for which the **Notify User** checkbox is selected) is copied to the document header or document line.



Note

If you add comments through the **Comments** action on a specific order document with the **Notify User** checkbox selected, you will not see a notification at the top but it is added to the count in the **Sales Comments/Purchase Comments** field.

Overview of Sales Comments and Purchase comments

On the Sales order page or any sales document page, on the action bar, go to **Navigate > Order > Sales Comments**.

On the Purchase order page or any purchase document page, on the action bar, go to **Navigate > Order > Purchase Comments**.

And also you can open the **Sales Comments View** or **Purchase Comment View** page by clicking the number, e.g., "1", appearing in the **Sales Comments** or in the **Purchase Comments** field in the header of the sales and purchase document.

The **Sales Comments View** or **Purchase Comment View** page displays all header and line comments. You can use the **Show in Warehouse Document** checkbox to configure whether comments from sales return orders and purchase return orders appear on the related warehouse shipments and warehouse receipts. You can still add, edit, or delete comments on the standard Business Central Comments pages that can be opened via the header or lines.



 Note

The **Starting Date** and **Ending Date** fields on the **Sales Comments View** and **Purchase Comments View** pages are not visible by default but can be viewed after personalization.

You can perform the following actions on the **Sales Comments View** and **Purchase Comments View** pages.

- Edit
- Delete

The page opens and all comments linked to this document, both on the header and at the line level, are shown.



Show standard comments in Warehouse documents

Article • 5/24/2023 • 4 min read

It is possible to create various warehouse documents from the sales and purchase documents. The comments shown on the sales and purchase source documents are also displayed on the newly created documents. On the **Standard Comments** page, you can specify whether the comments need to be displayed for the following documents:

- Warehouse Shipment
- Warehouse Pick
- Inventory Pick
- Inventory Put-away
- Warehouse Receipt

Refer to the [Set up standard comments](#) topic on how to set up the comments that should be shown for the connected documents.

Show Source Document Comments in Warehouse Shipment

The following procedure describes how to view the source document comments in the warehouse shipments.

1. Select the search icon , enter **Sales Order**, and then choose the related link.
The **Sales Order** page opens.
2. Select the desired **No.** from the list and ensure that the document is released.
3. On the action bar, go to **Actions > Warehouse > Create Warehouse Shipment**.
4. Select the **OK** button.
A new warehouse shipment is created.
5. Close the **Sales Order** page.
6. Select the search icon , enter **Warehouse Shipments**, and then choose the related link.
The **Warehouse Shipments** list page opens.
7. Select the related record in the **No.** field.
The **Warehouse Shipment** page opens.
8. The number of comments created in the linked source document is shown in the **Source Document Comments** field.
You can view the **Sales Comment** and/or **Purchase Comment** by clicking the value, e.g., "1", which appears in the **Source Document Comments** field.
9. To navigate to the Sources Documents Comments, on the action bar, go to **Related > Shipment > Source Document Comments**.



The **Sales Comment** and/or **Purchase Comment** opens. On this page, the respective source document's comments on the header and at the line level are inherited and displayed in the newly created document.

10. A notification is shown when a comment (for which the **Notify User** checkbox is selected on the **Standard Comments** page) is copied to the document header or document line.

You can view the **Sales Comment** and/or **Purchase Comment**, by clicking the **Show comments** in a blue bar at the top of the document.

Note

The above description also works similarly for Warehouse Receipt, Warehouse Pick, Inventory Put-Away and Inventory Pick.



Show standard comments in Production Orders

Article • 5/24/2023 • 7 min read

You can create production orders for produced items directly from sales orders. When creating the production order, the standard comments on the sales order are inherited and shown on the production documents. And the comments are shown only if the indications are set on the **Standard Comments** page.

Refer to the [Set up standard comments](#) topic on how to set up the comments that should be shown for the connected documents.

Production Order

1. Select the search icon , enter **Sales Order**, and then choose the related link.

The **Sales Orders** page opens.

2. On the action bar, click **New** to create new record.

3. In the **Customer Name** field, select the customer number and click **OK**.

4. For the sales order lines, in the **Type** field, select the type **Item** from the list.

5. In the **No.** field, select the item number.

6. In the **Quantity** field, enter the item quantity.

7. On the action bar, go to **Actions > Plan > Planning**.

The **View - Sales Order Planning** page opens.

8. On the action bar, click **Create Prod. Order**.

A dialog box appears and displays the following message:

Do you want to create production orders for this sales order?



9. Retain the default selections and click **Yes** to finish creating the production order.

A dialog box appears confirms that the planned production order has been created.

10. To close the dialog box, choose **OK**.

11. Select the search icon , enter **Firm Planned Prod. Orders**, and then choose the related link.

12. In the **No.** field, select the firm planned production order that was previously created.

The **Firm Planned Prod. Order** page opens.

The number of sales comments created in the linked sales order are shown in the **Sales Comments** field, e.g., "1".

13. Select the displayed number to open the **Sales Comments View** page.

You can see the overview of the comments.





14. Click the Back arrow button on the opened pages to navigate back to the role center page.



Show standard comments in transport orders

Article • 3/18/2026 • 2 min read

You can view standard comments on transport orders when they are inherited from the source document. These comments are displayed only when the relevant checkboxes are selected on the **Standard Comments** page.

1. Open the **Standard Comments** page.
2. Verify that the required checkboxes are selected to show comments on transport-related documents, such as:
 - Show in Transport Order
 - Print on Transfer Order

For more information on standard comments, see [Set up standard comments](#).

3. Open an existing transport order or create a new one. When the transport order is created, the system inherits the standard comments based on the setup.
4. On the **Transport Order** page, select the value in either the **Transport Sales Comments** or **Transport Purchase Comments** field based on your requirement.

Note

The field value indicates the number of comments linked to the source document, for example, 2.

The **Sales Comments View** or **Purchase Comments View** page opens and displays the inherited standard comments from the related sales or purchase document.

When a transport order is created, certain values and comments from the related source documents are retrieved and made available on the **Transport Order** page and its reports.

- County information: The values in the **Pick-up County** and **Ship-to County** fields are transferred from the **Sales Order** page to the **Transport Order** page. These values are also printed in the **Transport Order** report.
- Purchase comments: Standard purchase comments are copied from the **Purchase Order** page to the **Transport Order** page. These comments are included when the **Transport Order** report is generated.
- Sales comments: Standard sales comments are copied from the **Sales Order** page to the **Transport Order** page. These comments are also printed in the **Transport Order** report.



Copy comments to posted documents

Article • 5/15/2024 • 6 min read

Copy sales comments to posted sales shipment

When a sales order is posted for shipment, the system copies the comments from the sales order and adds them to the posted sales shipment.

1. Open the **Sales Order** page.
2. Enter the required comments manually at the header or line level, along with the standard comments, on the **Comment Sheet** page.
3. Post the sales order for shipment.
4. Open the desired **Posted Sales Shipment** page.
5. On the action bar, select **Shipment > Comments**.
The **Comment Sheet** page opens.

The comments added on the **Standard Comments** page are transferred from the sales order to the posted sales shipment.

Note

The **Document Type Standard Comments** field on the **Comment Sheet** page determines the type of document into which the standard comments will be automatically inserted.

You can also view comments added at both header and line levels in the document on the **Sales Comments View** page associated with the posted sales shipment document.

Note

On the **Sales & Receivables Setup** page, the **Copy Cmnts. Order to Shpt.** toggle must be turned on to copy comments from sales orders to posted sales shipment documents.

Copy comments from source documents to posted documents

The comments are copied from different sales documents as follows:

- Sales Order posted as Invoice: With the **Copy Comments Order to Invoice** toggle turned on, comments from the sales order are automatically transferred to the corresponding posted sales invoice.



- Sales Return Order posted as Return Receipt: With the **Copy Comments Ret. Ord. to Ret. Rcpt.** toggle turned on, comments associated with the sales return order are copied to the posted sales return receipt.
- Sales Return Order posted as Credit Memo: With the **Copy Comments Ret. Ord. to Cr. Memo** toggle turned on, comments from the sales return order to the corresponding posted sales credit memo are copied.

When performing the **Get Shipment Lines** action on the **Sales Invoice** page, the system copies all the line comments and manually edited standard comments from the posted sales shipment to the sales invoice document.

To avoid duplication, comments from documents where the **Doc. Type Stnd. Cmnts.** field is set to *All* and the **Created from Standard Comments** field set to *Yes* will not be copied.

Note

This functionality works similarly when performing the **Get Return Receipt Lines** on the **Sales Credit Memo** page.

The comments are copied from different purchase documents as follows:

- Purchase Order posted as Receipt: Comments are directly copied.
- Purchase Order posted as Invoice: Comments are directly copied.
- Purchase Return Order posted as Return Shipment: With the **Copy Cmts. Ret. Ord. to Ret. Shpt.** toggle turned on, comments from the purchase return order are automatically transferred to the posted purchase return shipment.
- Purchase Return Order posted as Credit Memo: With the **Copy Cmts. Ret. Ord. to Cr. Memo** toggle turned on, comments associated with the purchase return order are copied to the posted purchase credit memo.

When performing the **Get Receipt Lines** action on the **Purchase Invoice** page, the system copies all the line comments and manually edited standard comments from the posted purchase shipment to the purchase invoice document.

Comments from documents where the **Doc. Type Stnd. Cmnts.** field is set to *All*, and the **Created from Standard Comments** field is *Yes* will not be copied.

Note

This functionality works similarly when performing the **Get Return Shipment Lines** on the **Purchase Credit Memo** page.



Copy comments from sales order to sales invoice with combine shipment

Transfer comments from your posted sales shipment to the sales invoice when combining shipments in your system. By following the steps below, all relevant comments, including standard and manually added ones, are accurately reflected on your sales invoice documents.

Important

Turn on the **Copy Comments Shpt. to Invoice** toggle to copy comments from posted sales shipment to sales invoice and **Copy Comments Order to Invoice** toggle to copy comments from sales order to sales invoice (in case of Combine Shipment By is Shipment) on the **Sales & Receivables Setup** page.

1. Open the **Customer Card** page.
2. On the **Shipping** FastTab, in the **Combine Shipment By** field, select *Shipment* from the dropdown menu.
3. Open the desired sales order page and fill in the required details.
4. Post the sales order for *Ship* sales comments, which includes the standard comments and manually added comments. To know more about standard comments, see [Set up standard comments](#).
5. On the **Posted Sales Shipment** page, you can add comments to the header and line level of the document, which will be displayed on the associated sales invoice documents.
6. Open the **Combine Shipment By** report page.
7. Fill in the required details and select **OK**.
The shipments are combined, and the sales invoices are created for the related sales order.

The generated sales invoice document will showcase all comments, consolidating both standard and manually added ones at both the header and line levels.

Note

Comments added to the sales order after its posting for shipment will not be included on the sales invoice documents.

The outcome of running the **Combine Shipment By** report may vary depending on the following scenarios:

Consolidating shipments involves merging individual shipments for a particular customer into a unified invoice. This process streamlines billing by combining all relevant shipment details, such as items, quantities, and prices, into a single document. Through this consolidation, customers receive a comprehensive overview of their purchases. To know more, see [Create Consolidated Invoice](#).



Scenario 1: Combine Shipments By is set to Order

If the **Combine Shipment By** field is set to *Order* on the **Customer Card** page, then running the **Combine Shipment By** report will create a consolidated sales invoice for the relevant sales order and posted sales shipments (standard CSP functionality). This invoice will display all comments, including both standard and manually added comments, across both header from the sale order and line from the corresponding posted sales shipment.

Note

Comments added to the sales order header after its posting for shipment will also be included on the sales invoice documents.

Scenario 2: Combine Shipments By is set to Default, Date, Week, or Month

If the **Combine Shipment By** field is set to *Default*, *Date*, *Week*, or *Month* on the **Customer Card** page, then running the **Combine Shipment By** report will create a consolidated sales invoice for the relevant sales order and posted documents. This invoice will display all comments, including both standard and manually added comments, only at the line level of the sales order and posted sales shipment.

Note

When shipments are combined by date, week, or month, the **Combine Shipment By** report generates sales invoices according to the specified date filter. To know more, see [Combined Shipments Setup](#).



Translate standard comments

Article • 4/29/2025 • 1 min read

To translate the standard comments based on the required language, follow these steps:

1. Open the **Standard Comments** page.
2. On the action bar, select **Related > Translations**.
The **Translation Standard Comments List** page opens.
3. In the **Language Code** field, select the required code to translate the comments.
The system automatically uses the translated version of comments for document printing, depending on the customer language setting.

To update the comments in other languages, follow these steps:

4. Open the **Translation Standard Comments** card page.
5. On the **General** FastTab, in the **Language Code** field, select the required language.
6. Turn on the **All Language Codes** toggle to apply the comment to all languages. This setting overrides any language specified in the **Language Code** field. If the customer does not have a language code assigned, the system uses the language code where the **All Language Codes** toggle is turned on.
7. On the **Lines** FastTab, in the **Comment Text** field, enter the required comments.
The system translates and displays the comments on the source document based on the selected language code.

For more information about report selection for printing sales and purchase documents, see [Report selection](#).



Reports

Article • 10/15/2024 • 1 min read

The Aptean Reporting extension includes several reports and reporting functionalities. To learn more, see [Aptean Reporting](#).

You can view the standard comments on the following reports in RDLC and Word layout:

Report	Report ID
Sales Order Confirmation	60100
Sales Invoice	60101
Sales Shipment Note	60102
Sales CMR (Note that only the header comment will be visible in the report)	60103
Sales Quote	60104
Sales Pro Forma Invoice	60105
Sales Return Order	60106
Sales Blanket Order (Note that Sales Blanket Order report is only available in the RDLC layout.)	60107
Sales Credit Memo	60108
Purchase Return Order	60116
Purchase Credit Memo	60117
Purchase Invoice	60118
Purchase Quote	60119
Purchase Order	60122
Transport Order	60133
Purchase Blanket Order	60135

