

User Manual Aptean Food and Beverage ERP

Advanced Sales Management for Drink-IT

Product Documentation



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Release notes

Article • 6/24/2026 • 2 min read

To view what's new or changed in each release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, select the specific release version.

Date	Release version	Description
June 2026	2602.2.0.0	Minor release
May 2026	2602.1.0.0	Minor release
April 2026	2602.0.0.0	Major release
March 2026	2601.2.0.0	Stability release
February 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
November 2025	2507.1.0.0	Stability release
October 2025	2507.0.0.0	Feature release
September 2025	2506.0.0.0	Feature release
July 2025	2505.0.0.0	Feature release
July 2025	2504.0.0.0	Feature release
May 2025	2503.0.0.0	Feature release
April 2025	2502.0.0.0	Feature release
April 2025	2501.1.0.0	Stability release
March 2025	2501.0.0.0	Feature release
February 2025	2404.5.0.0	Stability release
February 2025	2404.4.0.0	Stability release
February 2025	2404.3.0.0	Stability release
January 2025	2404.2.0.0	Platform release
January 2025	2404.1.0.0	Stability release

December 2024	2404.0.0.0	Feature release
December 2024	2403.13.0.0	Stability release
November 2024	2403.12.0.0	Stability release
November 2024	2403.11.0.0	Stability release
October 2024	2403.10.0.0	Stability release
September 2024	2403.9.0.0	Stability release
September 2024	2403.8.0.0	Stability release
September 2024	2403.7.0.0	Stability release
September 2024	2403.6.0.0	Platform release
September 2024	2403.5.0.0	Stability release
August 2024	2403.4.0.0	Stability release
August 2024	2403.3.0.0	Stability release
July 2024	2403.2.0.0	Platform release
July 2024	2403.1.0.0	Platform release
July 2024	2403.0.0.0	Feature release
June 2024	2402.1.0.0	Stability release
June 2024	2402.0.0.0	Feature release
June 2024	2401.2.0.0	Stability release
April 2024	2401.1.0.0	Stability release
April 2024	2401.0.0.0	Feature release
March 2024	2312.2.0.0	Platform release
March 2024	2312.1.0.0	Stability release
January 2024	2312.0.0.0	Feature release
July 2023	23.500.106984.0	Feature release
March 2023	20.202303.0.0	Feature release



January 2023	20.202301.0.0	Feature release
November 2022	20.202211.0.0	Feature release
September 2022	20.202209.0.0	Feature release
July 2022	20.202207.0.0	Feature release
May 2022	20.202205.0.0	Feature release
March 2022	18.202203.0.0	Feature release
Januray 2022	18.202201.0.0	Feature release



2602.2.0.0

Release Note • 6/24/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
376702	The system fails to add new items to the customer's recurring sales lines when applying or closing the Order Entry page, even with the Add Sold Items to Sales Code field value set to <i>Automatic</i> or <i>Confirm</i> , if the customer's standard sales code was generated from a number series.



2602.1.0.0

Release Note • 5/27/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, the system automatically processes all customers assigned to a standard customer sales code when the **Exclusivity Type** field value is set to *Customer Specific 106FDW*, running the **Remove Unsold Items** report for each customer in a single run and removing sales lines for items that have not been sold within the specified period. The report supports both interactive and batch job execution.

Resolved issues

The following issues have been resolved in this release.

ID	Description
368629	The system fails to preserve the individual Reason Code field values defined on recurring sales lines when inserting them through the Order Entry page with the Insert Recurring Lines on Order Entry field value set to <i>Automatic</i> , causing all inserted lines to receive the Reason Code field value of the sales header instead.
368916	The system fails to add new items to the customer's recurring sales code after posting a sales order when the Add New Sold Items to Sales Code field value is set to <i>Automatic</i> .



2602.0.0.0

Release Note • 4/22/2026 • 3 min read

Features

With the features added in this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition,

- The system adds items related to a promotion rule directly to the order lines from the **Order Entry Promotion Items** page, to measure if the promotion is met and retrieve the overview of the item list which are linked to the active promotion. On opening the **Order Entry** page, the system validates whether active promotions are valid and the **Automatic Calculate Order Entry Promotion Item** toggle on the **Advanced Sales Management Setup** page is turned on, before calculating promotion items, and displays a message when required settings are not active. For each promotion rule, which can be opened from the **Alerts** FastTab, all applicable items can be calculated using the **Calculate Order Entry Promotion Items** action. The system displays a confirmation dialog when executing the **Calculate Order Entry Promotion Items** action more than once, preventing unintended recalculation. For each promotion rule, which can be opened from the **Alerts** FastTab, all applicable items can be displayed using the **Order Entry Promotion Items** action on the **Order Entry Promotion items** page. You can select an item and specify a quantity to add it directly to the order entry lines. The system automatically uses the unit of measure from the corresponding line on the **Order Entry** page or the sales unit of measure from the **Item Card** page when no order entry line exists — when calculating items on the **Order Entry Promotion Items** page. The system correctly applies rounding and unit of measure conversions when promotion quantities span multiple units, using the conversion factors from the **Item Unit of Measure** page. When promotions exist for the same item across different units of measure, the system automatically updates related promotion line quantities based on the applicable conversion factor. The **Current Quantity** field value on the **Promotions List** page opens directly to the **Order Entry Promotion Items** page. For volume promotions defined in hectoliters, the system displays insight information but restricts manual quantity entry where accurate conversion to other units of measure is not possible.

UI/UX changes

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

- The **Order Entry Promotion Items** page has been added linked to the **Sales and Purchase Condition Rules List** page.
- The **Calculate Order Entry Promotion Items** action has been added to on the **Sales and Purchase Condition Rules List** page.
- The **Automatically Calculate Order Entry Promotion Item** field has been added to the **Advanced Sales Management Setup** page.



Resolved issues

The following issue has been resolved in this release.

ID	Description
343995	The system fails to display seasonal items on the Alerts FastTab of the Order Entry page, even when the items are visible in the order entry lines.



2601.2.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition,

- An *Eventssubscriber* for the integration layer has been added to support item exclusivity in the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition. To know more, see [What's new in Sales-Purchase Conditions, version 2601.3.0.0](#).
- The *OnBeforeItemCanBeSold* integration event has been added to the *ItemCanBeSold* function in the *CallEntryPublisher106FDW* codeunit. This event includes an *IsHandled* parameter that allows partners to subscribe and override the customer blocked status check, enabling items to display in the *Quick Entry* screen on the **Order Entry** page even when the customer is blocked for shipment.

Resolved issues

The following issue has been resolved in this release.

ID	Description
362519	The system fails to recalculate the Unit Price Excl. VAT field value on the Order Entry page when the Unit of Measure field value is updated on the Order Entry page using the Apply Changes action, and instead retains the value calculated for the original unit of measure.



2601.1.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
352003	The system automatically positions the cursor on the last record in the order entry lines when opening the Order Entry page for a sales order that has recurring sales lines configured for automatic insertion.



2601.0.0.0

Release Note • 1/28/2026 • 2 min read

Features

With the features added in this release of the Apteau Beverage Advanced Sales Management extension, Drink-IT Edition,

- The Apteau [Feature Control](#) extension allows you to enable or disable the Apteau Beverage Advance Sales Management extension, Drink-IT Edition, based on your implementation needs. When the application is disabled, its functionality is no longer available to use. If any other extensions depend on the Apteau Beverage Advance Sales Management extension, Drink-IT Edition, the system automatically disables those extensions as well. This prevents you from accessing dependent functionality and avoid configuration conflicts, ensuring the system remains in a consistent and supported state.
- You can turn on the **Check Tax Rule for Order Entry** toggle on the **Tax Management Setup** page to allow tax rules to be checked directly during order entry, instead of waiting until executing the **Apply Changes** action. When the toggle is turned on directly when entering a quantity, the tax rules are checked and display an error when the tax rule is blocked. Additionally, the status of the sales document is optimized. When the **Release Order On Closing Order Entry** toggle on the **Advanced Sales Management Setup** page is turned on, and no changes are made on the **Order Entry** page, the sales document remains in Open status and is no longer automatically set to Released.

UI/UX changes

The **Check Tax Rule in Order Entry** toggle has been added to the **Order/Return Entry** FastTab of the **Tax Management Setup** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
320130	The system displays notification messages prompting manual insertion of item lines when creating sales documents for customers with recurring sales lines, default value set to insert lines automatically, instead of adding the item lines as expected.



2507.1.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
335899	The system displays blurred promotion lines on the Order Entry page after executing the Show / Hide Promotion Lines action and applying changes.



2507.0.0.0

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

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, the system:

- Checks whether the **Location Code** field value is filled on the **Sales Order** page before opening the **Order Entry** page. If the **Location Code** field value is missing, the system displays an error message.
- Displays free-of-charge items on the **Order Entry** page when reviewing and confirming orders. This enhancement allows you to view and adjust the complete order, including promotion items, directly from the **Order Entry** page without navigating back to the sales order, ensuring accurate order confirmation and updates.

Resolved issues

The following issue has been resolved in this release.

ID	Description
326983	An error occurs on the Order Entry page when adding an item with an item reference in the Quick Entry FastTab.



2506.0.0.0

Release Note • 9/24/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
315768	The system fails to update the Total Line Amount and Total Unit Price field values for two consecutive lines on the Order Entry page after executing the Apply Changes action when the associated Display Order field value is set to 0 and the Quality field value is changed from blank to a numeric value.



2505.0.0.0

Release Note • 7/30/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to support test scenarios and ensure compatibility with previous releases.

Resolved issues

The following issue has been resolved in this release.

ID	Description
309750	The system incorrectly moves the cursor to the Item No. field on the Quick Entry FastTab after entering a value in the Quantity field in the lines of the Order Entry page.



2504.0.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, the out-of-stock availability check logic has been enhanced to exclude non-inventory items. When you update sales lines on the **Order Entry** page, non-inventory items no longer trigger out-of-stock indicators or availability checks, as these items are not intended to be stock-tracked. This ensures accurate stock visibility and avoids unnecessary alerts for manually added service-related items such as handling charges.

Resolved issues

The following issue has been resolved in this release.

ID	Description
302179	The system incorrectly displays the confirmation message when closing the Order Entry page repeatedly after adding the mix and match promotion lines. This issue occurs when the Apply Order Entry Directly toggle on the Advanced Sales Management Setup page is turned off and the Quick Entry FastTab on the Order Entry page is updated.



2503.0.0.0

Release Note • 5/29/2025 • 1 min read

Features

With the features added in this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition,

- You can activate focus mode to improve readability and data entry efficiency on the **Order Entry** page. For more information, see [Fast order entry](#).
- The call entry status handling has been enhanced to improve accuracy during order processing. The system keeps the call entry open unless a released sales order with order lines is created. Additionally, the **Call Entries** page automatically refreshes when reactivated to reflect the latest changes. This ensures that call entries are only closed when a valid sales order is confirmed, preventing premature closure and maintaining accurate call tracking.

Note

The automatic closure of call entries upon sales order release depends on the **Order Created Call Status** field value configured on the **Advanced Sales Management Setup** page. Ensure your configuration aligns with your intended workflow to support accurate call entry handling.

UI/UX changes

The following actions have been added to the **Order Entry** page.

- Show / Hide Alerts
- Show / Hide Options
- Show / Hide Quick Entry
- Show / Hide All



2502.0.0.0

Release Note • 4/29/2025 • 1 min read

Features

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, updates have been made to optimize and improve system performance and reduce database locking issues during warehouse and tax-related operations.



2501.1.0.0

Release Note • 4/9/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition,

- The system enforces standard stock reservation validations when updating order entries on the **Order Entry** page, preventing modifications to sales lines with existing reservations. This ensures data integrity and prevents unintended reservation mismatches.
- Any free items resulting from promotions using the **Get Mix & Match Promotion Lines** action are visible on the **Order Entry** page. Additionally, you can execute the **Print Confirmation** action to print or preview the sales-confirmation report, which follows the setup of the order confirmation report generated from the sales order. This ensures that all items, including free-of-charge promotional items, are displayed during order verification, allowing customers to review, adjust quantities, and confirm their orders without navigating back to the sales order.

UI/UX changes

The **Print Confirmation** action has been added to the **Order Entry** page associated with the sales order.

Resolved issues

The following issue has been resolved in this release.

ID	Description
269384	The system fails to prevent blocked or exclusive items from appearing as valid substitutes when executing the Select Item Substitution action on the Order Entry page. Instead of filtering out these items, the system allows them to be selected and and displays an error only after the item is inserted into the sales line. Note that the <i>Item Exclusivity</i> feature must be enabled for the <i>Aptean Beverage Advanced Sales Management extension, Drink-IT Edition</i> application name on the Feature Control page.



2501.0.0.0

Release Note • 3/18/2025 • 1 min read

Features

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, the logistic statuses are correctly updated in alignment with the backorder functionality on the **Backorder Sales Lines** page, ensuring accurate shipment tracking. The backorder process functionality includes the following types:

- *No Backorder*: The warehouse shipment lines and sales order lines are updated with the picked quantity, and the warehouse shipment header status changes to *Completely Shipped*.
- *Backorder in Order*: The warehouse shipment lines are updated with the picked quantity, and the warehouse shipment header status changes to *Completely Shipped*.
- *Backorder in Blanket Order*: The warehouse shipment lines are updated with the picked quantity, the warehouse shipment header status changes to *Completely Shipped*, and a blanket sales order is created for the remaining quantity.

The **Backorder Process** action can be executed from the **Route Planning Worksheet** page. If the **Backorder Process** action on the **Backorder Sales Lines** page is not used, the warehouse shipment header status remains *Partially Shipped*, and the standard logistic status process is followed accordingly.



2404.5.0.0

Release Note • 2/28/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, when you select a value in the **Quantity Actual (Minimum)** field on the **Condition Periodic Settlement Journals** page, the **Indirect Sales Entries** page opens. This applies only to the **Quantity Actual (Minimum)** field values created with the **Indirect Sales** checkbox selected on the **Sales and Purchase Condition Calculations** page. This enhancement addresses the issue reported in bug ID #258818.

Resolved issues

The following issue has been resolved in this release.

ID	Description
258818	The system displays incorrect value in the Quantity Actual (Minimum) field on the Condition Periodic Settlement Journals page due to a filter issue, showing unrelated item ledger entries. Additionally, the system displays an incorrect sign in the Quantity Actual (Minimum) field value.



2404.4.0.0

Release Note • 2/21/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to support test scenarios and maintain compatibility with the previous changes.



2404.3.0.0

Release Note • 2/6/2025 • 3 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition,

- The system filters out blocked or excluded items when executing the **Select Item Substitution** action on the **Sales Order** or **Order Entry** page.

 **Note**

Ensure that the item exclusivity feature is enabled on the **Feature Control** page.

- You can execute the **Apply Changes** action on the **Order Entry** page even if no modifications have been made to the existing order.

Resolved issues

The following issues have been resolved in this release.

ID	Description
263341	The system fails to update the Unit Price , Total Unit Price , and Total Line Amount field values on the Order Entry page. This issue occurs when the Release Order On Closing Order Entry toggle is turned on, and the sales and purchase condition lines are deleted after reopening the associated released sales order. However, the Total Unit Price and Total Line Amount field values get updated when the Apply Changes action is executed. Note that if the Total Unit Price and Total Line Amount field values are being added by personalization, you always need to execute the Apply Changes action on the Order Entry page.
235445	The system incorrectly displays a message indicating that the shipment date is before the working date after executing the Apply Changes action on the Order Entry page for each line. This issue occurs irrespective of the configurations on the Advanced Sales Management Setup page, after changing the quantity on existing lines and adding new lines.
263660	The system fails to release the order entry even when the Release Order On Closing Order Entry toggle on the Advanced Sales Management Setup page is turned on. This issue occurs when the Order Entry page is closed without any changes.



256068	The system incorrectly updates the Item Availability field by reducing its value twice the intended amount when the Quantity field value for the related item is modified on the Order Entry page. This issue occurs when the Apply Order Entry Directly toggle on the Advanced Sales Management Setup page is turned on.
253606	• The system generates sales alerts on the Order Entry page regardless of the start and end date limits. • The system fails to display the <i>New</i> and <i>Seasonal</i> options in the Sales Alerts field on the Quick Entry page. • The system does not allow to edit the Description field value on the Quick Entry page when the Sales Type field value is set to <i>New</i> or <i>Cross-Sell</i>.



2404.2.0.0

Release Note • 1/21/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, the *OnAfterSetReleaseOrder* event has been added to the *OrderEntry106FDW* page to enhance customization.



2404.1.0.0

Release Note • 1/7/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
248145	The system fails to display the correct color code in the order entry lines on the Order Entry page based on the item availability.



2404.0.0.0

Release Note • 12/12/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, you can streamline the management of exclusive and non-exclusive items for customers automatically based on recurring sales lines. To know more, see [Exclusivity](#).

UI/UX changes

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

- The **Valid Sales Code** field has been added to the **Customer Card** page.
- The **Exclusivity Items** action (**Related** > **Sales** > **Exclusivity Items**) has been removed from the **Customer Card** page.
- The **Update Allowed Items** action has been deleted from the **Customer Card** page.



2403.13.0.0

Release Note • 12/3/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, the performance has been optimized for the **Apply Changes** action on the **Order Entry** page associated with sales and purchase orders.



2403.12.0.0

Release Note • 11/22/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
245434	The system incorrectly updates the Condition Alerts field on the Order Entry page even when an item of the combined items has been deleted in the lines for which a sales purchase condition rule is assigned. This issue occurs when the Calc. Condition Alerts field is set to <i>Always</i> and Calc. Alerts in Background toggle is turned off on the Advanced Sales Management Setup page.



2403.11.0.0

Release Note • 11/7/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, the sales return order functionality has been extended to include a minimum order amount. Additionally, you will receive a confirmation message when a sales return order has a total amount with a negative value below the minimum order value.



2403.10.0.0

Release Note • 10/8/2024 • 2 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, you can edit the **Description** field on the **Sales Notifications** dialog associated with the **Item Card** page. Additionally, the **Sales Alerts** field on the **Order Entry** page is updated as follows for a new item added with the following configuration on the **Advanced Sales Management** FastTab of the **Item Card** page.

Sales Notification New	Sales Notification Seasonal	Sales Notification Cross-sell Items	Sales Notification U
Yes	Yes/No	No	No
Yes	Yes/No	Yes	Yes
Yes	Yes/No	No	Yes
Yes	Yes/No	Yes	No
No	Yes/No	Yes	No
No	Yes/No	No	Yes
No	Yes/No	No	No
No	Yes	No	No
No	Yes	No	No

 **Note**

The **Sales Notification New**, **Sales Notification Seasonal**, **Sales Notification Cross-sell Items**, and **Sales Notification Upsell Items** fields are on the **Advanced Sales Management** FastTab of the **Item Card** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
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230325	The system fails to update the Condition Alerts field on the Order Entry page associated with a sales order based on the value of the Show Condition Line Alerts field.
232613	The system fails to display the values in the Condition Alerts field on the Order Entry page when it is reopened with the Calc. Alerts in Background toggle on the Advanced Sales Management Setup page turned on.
235266	The system incorrectly deletes the Condition Alerts field values upon executing the Apply Changes action on the Order Entry page associated with the sales order. This issue occurs on the lines where the Quantity field is filled.
220694	The system fails to update the Condition Alerts field on the Order Entry page even when the Calculate Condition Line Alerts field on the Order Entry page and Order Entry Condition Alerts field on the Advanced Sales Management Setup pages are set to <i>Always</i> .



2403.9.0.0

Release Note • 9/30/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT Edition, when you close the **Order Entry** page or execute the **Apply Changes** action , the **Get Mix & Match Promotion Lines** action is automatically executed when the **Apply Order Entry Directly** toggle on the **Advanced Sales Management Setup** page is turned on. After the execution, if the **Undefined Quantity** field value is

- Not equal to zero, the system automatically opens the **Mix & Match** page and allows you to make the relevant changes.
- Equal to zero, the system skips the **Mix & Match** page and calculates the document lines.

Resolved issues

The following issue has been resolved in this release.

ID	Description
224077	The system incorrectly suggests lines for indirect sales entries on the Condition Journals page, even when corresponding condition entries already exist.



2403.8.0.0

Release Note • 9/16/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
231491	An error occurs upon executing the Apply Changes action or closing the Order Entry page after modifying the Quantity field to 0 for an item.



2403.7.0.0

Release Note • 9/11/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, Drink-IT edition, 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.



2403.6.0.0

Release Note • 9/3/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, the *GetConditionRules* procedure in the *CalculateConditionAlerts106FDW* codeunit has been changed from internal to global to increase flexibility in handling and enhance customization.



2403.5.0.0

Release Note • 9/2/2024 • 2 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, you can define how the items and item categories are to be sorted. The sorting method order is automatically inherited based on the configuration from the **Advanced Sales Management Setup** page. However, you can modify the order on the **Order Entry** page using the **Display Order** and **Sequence Item Category** options in the **Sorting Method** field. Additionally, the **Sequence Item Category** field value is inherited from the **Item Categories** page. The **Sorting On Sequence Order Entry** and **Reset Sorting** actions sort and reset the order of the entries on the **Item Categories** page.

UI/UX Changes

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

- The **Sorting On Sequence Order Entry** and **Reset Sorting** actions have been added to the **Item Categories** page.
- The **Sequence Order Entry** field has been added to the **Item Categories** page.
- The **Display Order** and **Sequence Item Category** fields have been added to the quick entry lines of the **Order Entry** page.
- The *Display Order* and *Sequence Item Category* options have been added to the **Sorting Method** field on the **Options** FastTab of the **Order Entry** page.
- The *Display Order* and *Sequence Item Category* options have been added to the **Default Order Entry Sorting Method** field on the **Order Entry** FastTab of the **Advanced Sales Management Setup** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
226890	The system incorrectly displays the charges and discounts for items on the Sales and Purchase Condition Rules List page upon executing the View Promotions action on the Order Entry page.
227032	The system incorrectly filters and displays all the rules in the Condition Alerts field on the Quick Entry FastTab of the Order Entry page, even when only the filter is set to display the promotion type condition alerts for a selected customer.



226274	An error occurs upon executing the Preview Posting action on the Sales Order page when the order is not released.
229905	The system incorrectly calculates and updated the Total Unit Price and Total Line Amount fields on the Order Entry page. Additionally, these fields are also not updated from the associated sales order upon executing the Apply Changes action.



2403.4.0.0

Release Note • 8/28/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension,

- The *OnBeforeCheckMinimumCustomerAchievedAndConfirm* integration event has been added to the *OrderEntrySubs106FDW* codeunit to suppress the minimum order value warning on sales documents.
- The *OnBeforeConfirmLinking* integration event has been added to the *CallEntryPublisher106FDW* codeunit to link the call entries with the sales order for the same customer without a confirmation message.

Resolved issues

The following issues have been resolved in this release.

ID	Description
227113	The Ext. Document No. on Release field on the Customer Card page is incorrectly updated based on the status of the Ext. Document No. on Release toggle on the Advanced Sales Management Setup page.
189772	The Indirect Sales Amount (Actual) field was incorrectly spelled on the Condition Ledger Entries (Sales and Purchase) page.



2403.3.0.0

Release Note • 8/7/2024 • 2 min read

Enhancements/Modifications

With this release of the Aptean Beverage Advanced Sales Management extension, the validation on the minimum order amount has been updated. You will not receive a warning message if a Sales Invoice or Sales Credit Memo has an amount lower than the minimum order amount defined for a customer, provided the document is for a combined shipment/receipt, rental, or loan.

Resolved issues

The following issues have been resolved in this release.

ID	Description
220254	The system fails to update the Reason Code field value on the Sales Order page when the Reason Code field vale is changed on the associated Order Entry page. This issue occurs when the Apply Order Entry Directly toggle on the Advanced Sales Management Setup page is turned on.
214857	The system incorrectly calculates the Quantity field value when the Suggest Periodic based on History action is executed on the Condition Journals page. This issue arises when an indirect sales journal is posted in another unit of measure than the base unit of measure.
207349	An error occurs on the Job Queue Entry Card page upon executing the Run Once (Foreground) action when no call schedule lines are active.
211969	The system incorrectly updates the options in the Ext. Document No. on Release mandatory field on the Customer Card page irrespective of the Ext. Document No. on Release mandatory toggle value on the Advanced Sales Management Setup page.
222968	An error occurs on the Order Entry page when a line is deleted while the Apply Order Entry Directly toggle on the Advanced Sales Management Setup page is turned on.



2403.2.0.0

Release Note • 7/8/2024 • 1 min read

Enhancements/Modifications

The *LocationCode*, *UnitofMeasureCode*, and *ItemNo* variables were made vars protected on the **Line Details** FactBox of the **Order Entry** page to ensure customization.



2403.1.0.0

Release Note • 7/3/2024 • 1 min read

Enhancements/Modifications

The *OnHandleOnBeforeModifySalesHeader* integration event is added to the *CallEntryPublisher106FDW* codeunit to update the sales order created from the **Call Entries** page.



2403.0.0.0

Release Note • 7/2/2024 • 1 min read

Enhancements/Modifications

This release of the Aptean Beverage Advanced Sales Management, Drink-IT edition has the following enhancements.

- On the **Order Entry** page, when the **Only Lines with Quantity** toggle is turned on and the items are removed, the associated items are also removed from the **Sales Order** page.
- On the bottom of the **Order Entry** page a notification stating the progress of the calculation condition alerts is displayed upon executing the **Calculate Condition Alerts** action.

Resolved issues

The following issues have been resolved in this release.

ID	Description
173029	A performance issue occurs when inserting sales lines due to the reduction in locktable by the order entry.
196134	The Minimum Order Amount Excl. VAT field check fails while closing the Order Entry page or when initiating the Release Sales Document action, which does not consider the automatically added tax, deposit and sales condition lines.
196458	The system fails to update the values in the Order Details and Order Totals fields on the Sales Order page based on the changes made on the Order Entry page.



2402.1.0.0

Release Note • 6/27/2024 • 1 min read

Enhancements/Modifications

The variable for the **Item No.** field on the **Order Entry** page was changed from normal to protected to improve accessibility across tables, table extensions, pages, page extensions, reports, and report extensions.



2402.0.0.0

Release Note • 6/13/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
189831	An error occurs on the Sales Order page if the External Document No. field is left empty after executing the Return Entry action and exiting the Return Entry page, regardless of the order's status. This happens when the Ext. Document No. on Release Mandatory toggle is turned on in the Advanced Sales Management Setup page.



2401.2.0.0

Release Note • 6/6/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
193434	The system fails to update the Condition Alerts field value for multiple lines upon executing the Order Entry action on the Sales Order page. This occurs when the Calc. Alerts in Background toggle is turned on and the Order Entry Condition Alerts field is set to <i>Always</i> or <i>On request</i> on the Advanced Sales Management Setup page.
199689	Duplicate lines are added to the sales order lines on the Sales Order page when the Order Entry page is opened more than once.



2401.1.0.0

Release Note • 4/17/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
195931	Upon accessing the Order Entry page from the Sales Order page, the cursor is not located in the expected field (Item No.) on the Order Entry page.



2401.0.0.0

Release Note • 4/4/2024 • 3 min read

Features

With this release of the Aptean Beverage Advanced Sales Management extension, you can :

- Setup if the **Variant Code** field on the **Order Entry** page is shown directly in the **Quick Entry** pane for sales documents.
- Automatically update the **Variant Code** in the **Quick Entry** and **Order Lines** with a *Sales Default* (Drink-IT Foundation) when using **Item Variants**.
- Consolidate and process the payments efficiently with Payment Specifications. To know more, see [Walkthrough - Payment Specification](#).

Enhancements/Modifications

This release of the Aptean Beverage Advanced Sales Management, Drink-IT Edition has the following enhancements:

- The **Conditions Alerts** field on the **Order Entry** page gets updated as expected when the **Calc. Alerts in Background** toggle is turned on and either *On Request* or *Always* is selected in the **Order Entry Condition** field on the **Advanced Sales Management Setup** page.
- Indicate the status of the tasks with a counter while closing the page or executing the **Apply Changes** action on the **Order Entry** or **Sales Order** pages. The tasks involve the creation of sales lines, tax document lines, empty good document lines, sales & purchase condition document lines, and attached sales lines.

UI/UX changes

The following UI/UX changes are made in this release:

- The **Payment Specifications** list and **Payment Specification** card page has been added.
- The **Payment Specification** FastTab is added on the **Advanced Sales Management Setup** page.
- The **Quick Entry** FastTab is added to the **Advanced Sales Management Setup** page.
- The **Variant Code** field is added to the **Quick Entry** FastTab of the **Order Entry** page.
- The **Payment Customer** toggle and **Payment-from Customer No./Balance (LCY) as Payment Customer** fields are added to the **Payment Specification** section on the **Advanced Sales Management** FastTab of the **Customer Card** page.
- The following fields are added on the **Customer Ledger Entries** page:
 - **Payment Specification Doc. No.**



- **Payment-from Customer No.**
- **Deposit Amount**
- **Deposit Amount (LCY)**
- **Tax Amount**
- **Tax Amount (LCY)**
- The **Payment-from Customer No.** field is added to the **Detailed Customer Ledger Entries** page.
- The **Payment-from Customer No.** field is added to the **Advanced Sales Management** FastTab of all sales documents.
- The **Payment-from Customer No.** field is added to the **General Journals, Payment Journals** and **Recurring General Journals** list page.

Resolved issues

The following issues have been resolved in this release:

ID	Description
163598	An error occurs on the Order Entry page while adding the Item No. on the Quick Entry FastTab.
170824	The notification message regarding the Minimum Order Amount excl. VAT appears twice on the Order Entry page while executing the Apply Changes action or closing the page when the Release On Closing Order Entry toggle on the Advanced Sales Management Setup is turned on. Additionally, the notification message also appears on the Return Entry page when applying changes or closing the page.
182875	An error occurs when executing the Get Recurring Sales Lines action on the Order Entry page if there is an existing record on the lines or when executed for the second time. Also, an error message occurs while executing the Get Blanket Order Lines action if there is an existing record on the lines from the blanket order lines.
188770	An error occurs on the Suggest Periodic based on history card page for periodic discounts on indirect sales, preventing filtering by dimension.



2312.2.0.0

Release Note • 3/22/2024 • 1 min read

Enhancements/Modifications

An integration event has been added to the Order Entry table to inherit specific field values from the **Order Entry** page to the associated sales header at the same moment as updating the **External Document No.** field.



2312.1.0.0

Release Note • 3/7/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
173241	A performance issue occurs when opening the Items list page after updating the Disable Auto-update Allowed Items toggle on the Advanced Sales Management Setup page.



2312.0.0.0

Release Note • 1/10/2024 • 4 min read

Enhancements/Modifications

This release of Aptean Beverage Advanced Sales Management, Drink-IT Edition has the following enhancements:

- You can now set the minimum order amount on the customer card. Orders associated with it will be released only after this value is reached upon calculation.
- In the Order Entry process, all recurring sales lines are retrieved when an item is used in multiple lines, each with different reason codes.
- You can remove the unsold items from the recurring sales lines using a batch job after the specified period.
- You can set up whether to automatically apply the updated allowed items functionality when you create or edit an item or manually either from the item card or as a batch process.
- The **Minimum Order Amount Excl. VAT** value is checked for sales orders, sales quotes, and sales invoices. The Sales Invoices created through Combine Invoicing are excluded.
- The **Reason Code** field on the **Standard Sales Lines Card** page helps differentiate the entries when the same items are entered multiple times.
- Indirect Sales enable the setup of indirect customers who can make deliveries to other indirect customers.
- You cannot select an excluded item on the Mix & Match selection page.
- The **Item Reference No.** field on the **Indirect Sales Journal** page enables you to record the item numbers as defined by the Delivered-by Customer.
- The **Customer Reference** field on the **Indirect Sales Journal** page allows you to record the customer number by which the customer is known in the delivery-by customer's system.
- The Exclusivity Item table has been redesigned to contain necessary information and details of exclusive customers.

UI/UX changes

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

- The **Minimum Order Amount Excl. VAT** field is added on the **Advanced Sales Management** FastTab of the **Customer Card** page.
- The **Default Not Sold Period Formula** field is added on the **General** FastTab of the **Advanced Sales Management Setup** page.
- The **Disable Auto-update allowed items** toggle is added on the **General** FastTab of the **Advanced Sales Management Setup** page.
- The **Reason Code** field has been added on the **Lines** FastTab of the **Standard Sales Lines Card** page.



- The **Item Reference No.** field has been added to the **Indirect Sales Journal** page.
- The **Customer Reference** field has been added to the **Indirect Sales Journal** page.
- The **Alerts** FastTab on the **Advanced Sales Management Setup** page has been renamed to **Order Entry** FastTab. The **Alerts** and **Sorting** sections are added on the **Order Entry** FastTab.
- The **Default Order Entry Sorting Method** field is added on the **Order Entry** FastTab of the **Advanced Sales Management Setup** page.

Resolved issues

The following issues have been resolved in this release:

ID	Description
155801	An error occurs on the Sales Order page while executing the Post/ Preview Posting action when using the minimum order amount functionality.
129961	When Recurring Sales Lines have multiple entries for the same item, only the first entry is displayed on the Order Entry page.
244370	The Description field value is not displayed on the Sales Notification page when the Notify as New Item action is executed.
246561	When applying the filter on the Call Entries page, only the filtered lines are moved to the sales order.
248336	The sold items in the Order Entry page are added to the recurring sales line for a customer for whom the customer specific sales code does not exist.
250037	The Volume 1 and Volume 2 field values on the Indirect Sales Journal lines are not recalculated and correctly updated on changing the value in the Unit of Measure Code field.
146031	The Customer Relations toggle is not working on the Advanced Sales Management FastTab of the Customer Card page. Additionally, when Indirect is selected in the Customer Type field, the Delivered-by Customer No. field does not become visible.
145739	The Update Allowed Item function on the Advanced Sales Management FastTab of the Customer Card page is not correctly updating exclusive items and customers in the recurring sales line.



23.500.106984.0.0

Release Note • 1/9/2024 • 7 min read

The **Drink-IT Advanced Sales Management** has been rebranded to **Aptean Beverage Advanced Sales Management, Drink-IT Edition**.

Features

PBI No.	Description
241494	Include the (BCA) Sales Order Comments in the Order Entry page.
241495	Showing Published Price Information of items on the Order Entry screen.
247162	Zero quantity lines in an order should not prevent the (completely) shipped logistic status (ASM).
246308	Reorganize the actions on the Order Entry page.

Resolved issues

PBI No.	Description
244208	Error on Get Blanket Order Lines in Order Entry page.
245747	Include Original Quantity in sales shipment lines.
243170	Backorder Lines page should exclude inbound lines and service items.
242188	Exclusive item doesn't work when you use the function Copy item.
226836	Item reference customer no (group item references)- part 2.
238744	Process No Backorder should include warehouse shipment line.
241766	Issue in Route Planning Worksheet with processing Backorder Lines.
246457	Not able to process a sales backorder line to a blanket order when ext. item text lines.
247651	ASM - LOG - Processing backorder should update the Logistic Status to Whse Picked as well.



PBI 241494 - Include the (BCA) Sales Order Comments in the Order Entry page

What

Include the (BCA) Sales Order Comments in the Order Entry page.

Why

As a telesales operator, you can register (NORRIQ BCA) comments that are relevant for a sales order in the sales order page. But when you call your customers, and do the order intake, you use the Order Entry page. In this page, you want to be able to see the comments from the related sales order and have the possibility to modify them and add new ones in sync with the sales order, so you have the same experience as you have on the Sales Order.

How

1. On the **Sales Order** Page, choose the **Comment** action and register your comment on the Comment Sheet page.
2. Choose the **Order Entry** action to open the related Order Entry page.
3. On the **Order Entry** page, choose the **Comment** action.
4. On the Comment Sheet page:
 - You can see the comment you registered on the order.
 - You can add, modify and delete comments.
5. The comments that you registered on the Order Entry page are also visible on the Sales Order.

PBI 241495 - Showing Published Price Information of items on the Order Entry screen

What

Showing Published Price Information of items on the Order Entry screen.

Why

As a sales order operator, when you are on the phone with your customer, you want to see the product prices that the customer has to pay, so you can inform and advise him in a correct way.

How

1. On the Order Entry page, add the **Published Price** field to the lines by Personalize the page.



The Published Price is from the Gross Net Price List in Apteau Beverage Foundation. This list is a dedicated table that contains, per customer, all price details for one unit of an item that this customer is allowed to buy.

PBI 247162 - Zero quantity lines in an order should not prevent the (completely) shipped logistic status (ASM)

What

Sales order lines for which the quantity has been reduced to zero by the process backorder function are considered completely shipped.

Why

Zero quantity lines in a sales order are not checked for completely shipped by BC, assuming you would still fill in a quantity for it. When the quantity is set to zero by the process backorder function it should, so that it does not prevent the logistic status to be set completely shipped (and also: not prevent the order to be removed, once it is completely invoiced).

How

Scenario 1.

Create a **sales order** with lines and release it. Search for **Backorder Lines** (directly or open it from the route planning worksheet). Set the quantity to ship to zero of a line and click on **process backorder**. Post the shipment (from order of from warehouse shipment). The LOG logistic status is now updated to the status with action type 'SHIPPED'.

Scenario 2.

Create a **sales order** with lines and release it. Set the quantity to ship to zero of a line and post the shipment (from order of from warehouse shipment). Search for **Backorder Lines** (directly or open it from the route planning worksheet) and click on **Process Backorder**. The LOG logistic status is now updated to the status with action type 'SHIPPED'.

PBI 246308 - Reorganize the actions on the Order Entry page

What

Reorganized actions on the Order Entry page.

Why

As a sales operator, you want to be able to choose actions on the order entry page in an easy and clear way, so you can do your work in an efficient way.



How

The actions are now grouped:

Under **Process**:

- Apply Changes
- Calculate Condition Alerts

Under **Prepare**

- Get Recurring Sales Lines
- Get Blanket Order Lines
- Select Item Substitution

Under **Order**

- Comments

Under **Actions**

- Move Up
- Move Down

You can “Pin” the actions in the action bar (advise).

PBI 244208 - Error on Get Blanket Order Lines in Order Entry page

What

When executing the function get Blanket Order Lines in the order entry page, an error would occur. That has been resolved.

PBI 245747 - Include Original Quantity in sales shipment lines

What

when the quantity of a sales order line was decreased by the process backorder function, the originally ordered quantity was registered in the sales line but not (after posting) in the posted sales shipment line. That has been resolved.



PBI 243170 - Backorder Lines page should exclude inbound lines and service items

What

The backorder Lines page showed also sales order lines with a negative quantity and items of type non-inventoriable and service. Such line should not be included in the backorder processing. They are now filtered out in the page, do not show.

PBI 242188 - Exclusive item doesn't work when you use the function Copy item

What

Exclusive item doesn't work when you use the function Copy item.

Why

When you, as a sales manager, create a new exclusivity item with the function Copy Item, you notice that you still can sell this new exclusivity item. This issue is fixed.

PBI 226836 - Item reference customer no (group item references)- part 2

What

When the Sell-to customer was changed in a sales header, field Item Reference Customer No. was not updated. That has been resolved.

PBI 238744 - Process No Backorder should include warehouse shipment line

What

the function process backorders in the backorder Lines page would update the sales order lines, but not the warehouse shipment lines, so those documents would remain open and even could give a conflict. That has been resolved. When no warehouse pick lines exist, the warehouse shipment line is updated the same way as the sales order line, the line is even removed when the quantity is set back to zero.



PBI 241766 - Issue in Route Planning Worksheet with processing Backorder Lines

What

Issue in Route Planning Worksheet with processing Backorder Lines.

Why

When you, as a sales manager, want to process backorder lines from the Route Planning Worksheet with Backorder Type No Backorder, it doesn't process all the selected lines. This issue is fixed.

PBI 246457 - Not able to process a sales backorder line to a blanket order when ext. item text lines

What

The process backorder function would give an error in case extended text lines were inserted for an item. That has been resolved.

PBI 247651 - ASM - LOG - Processing backorder should update the Logistic Status to Whse Picked as well

What

ASM - LOG - Processing backorder should update the Logistic Status to Whse Picked as well.

Why

When a logistic status for sales orders is created with action WHS PICKED, an order gets that status when all lines are completely picked. The process backorder is now updating warehouse shipment lines, but not yet the logistic status of the order that shows the completely picked status. That has been resolved.



20.202303.0.0

Release Note • 7/6/2023 • 10 min read

Features

PBI No.	Description
241671	Update Allowed Items when an item is added to recurring sales lines
239898	Call schedule lines based on Source Routes when LOG is installed
235573	Sync LOG Shipment day from Route, Source Route with ASM Call Schedule
217480	Addition of "Qty on Order" & "Qty in Backorder" on Order Entry Factbox
228574	Exclusivity Update Batch is running to long

Resolved issues

PBI No.	Description
241766	Issue in Route Planning Worksheet with processing Backorder Lines
241716	Item Description is missing in Sales Notifications for type Upsell and Description is wrong for type Upsell and Cross-Sell
239460	Wrong filter on Backorder Lines when shipment date is in the future
239438	Sales Order No. should be removed in Call entry when you delete the Sales Order

PBI 241671 - Update Allowed Items when an item is added to recurring sales lines

What

Update Allowed Items when an item is added to recurring sales lines.

Why



As a master data manager, you create new items and add them as included to recurring sales lines. When you have done this, you expect the new item to be available for all customers that make use of the selected recurring sales lines and that you can verify that on the item card, so you can do your work in a correct and efficient way.

How

1. Select the Search icon , enter **Items** and then choose the related link.
2. Select, or create as new, the item you want to include in recurring sales lines.
3. On the **Item Card** page, choose the **Include item on recurring sales lines** action on the **Advanced Sales Management** FastTab.
4. On the **Recurring Sales Lines** page, select one or more Recurring Sales Lines as necessary and choose OK.
5. When the Item is an Exclusive Item:
 - The item is added to the **Allowed Exclusive Items** for all customers with these Recurring Sales Lines.
6. When the Item is not an Exclusive Item:
 - The item is added to the **Allowed Items** for all customers with these Recurring Sales Lines.

PBI 239898 - Call schedule lines based on Source Routes when LOG is installed

What

Call schedule lines based on Source Routes when LOG is installed.

Why

Customers may be limited in what days can be delivered. When Drink-it Logistics is installed this can be setup in the source routes. Call schedule lines contain a shipment day as well, they should be in synch.

How

1. Select the Search icon , enter **Customers** and then choose the related link.
2. Select a default **Route** on fastTab **Logistics**.
3. Drill down on the Assit-edit button of that field and view the **Source route** line. You can add lines or alter.
4. Select a day of the week in field **Shipment Day** when the customer is limited to that.
5. Open the **Call Schedule** for the customer and create a line.
6. Select in field **Route** from the source routes from the customer, field **Shipment day** is set from that if set, and can then not be changed in the call schedule.



PBI 235573 - Sync LOG Shipment day from Route, Source Route with ASM Call Schedule

What

Sync Shipment day from LOG Route, Source Route with ASM Call Schedule.

Why

It was possible to create call entries with a shipment day that conflicted with shipment days defined for the customer in the source routes.

How

1. Select the Search icon  , enter **Customers** and then choose the related link.
2. Open action **Call Schedule** from the customer card.
3. In field **Route** select a **source route** record defined for the customer.
4. When the source route was setup with a **shipment day**, the call schedule line inherits it and that cannot be changed.

You can update the customer's shipment dates from the call schedule by clicking on the action **Create Shipment dates**.

PBI 217480 - Addition of "Qty on Order" & "Qty in Backorder" on Order Entry Factbox

What

Addition of "Qty on Order" & "Qty in Backorder" on Order Entry FactBox.

Why

As a sales operator, it is useful to see if products are already included in an existing order, or taken in backorder, so you are able to give complete information to your customer.

How

On the **Order Entry** page, you can see the *Quantity in Order* and *Quantity in Backorder* for a selected line in the **Line Detail** FactBox. These outstanding quantities are the totals for the customer where you do the order entry for.



PBI 228574 - Exclusivity Update Batch is running to long

What

Exclusivity Update Batch is running too long.

Why

When you have a lot of customers and items, the Update Exclusivity Items will take long to execute and blocks other sessions. As an application manager, you want the users to have access to the system at any time and that they can do the sales order intake with the up-to-date exclusivity setup.

How

- When you select or unselect the **Exclusivity Customer** field on the Customer Card:
 - The update function for that customer will be executed as normal.
 - When the field is changed in batch mode, like in applying a Conf. Package, the update is not executed.
- When you choose the **Update Exclusivity Items** action, the filters on the page where you opened it from are applied.
- When you select a **Recurring Sales Line** for an Exclusivity Customer.
 - The update function is executed for that customer.
 - When the table is changed in batch mode, like in applying a Conf. Package, the update is not executed.

PBI 241766 - Issue in Route Planning Worksheet with processing Backorder Lines

What

Issue in Route Planning Worksheet with processing Backorder Lines.

Why

When you, as a sales manager, want to process backorder lines from the Route Planning Worksheet with Backorder Type **No Backorder**, it doesn't process all the selected lines. This issue is fixed.

PBI 241716 - Item Description is missing in Sales Notifications for type Upsell and Description is wrong for type Upsell and Cross-Sell

What



Item Description is missing in Sales Notifications for all types and the description is wrong for type Upsell and Cross-Sell.

Why

When you, as a sales manager, create a new item and you set up a Sales Notification, the description is blank when you open the Sales Alerts from the Order Entry on your Sales Order.

And when there is a description shown, it shows the wrong description. It should show the description from the Upsell item, or Cross-Sell item. This issue is fixed.

PBI 239460 - Wrong filter on Backorder Lines when shipment date is in the future

What

Wrong filter on Backorder Lines when shipment date is in the future.

Why

When you as a logistic manager want to see the backorder lines for a specific route in your Route Planning Worksheet, you don't see your backorder lines when the shipment date is in the future. This issue is fixed.

PBI 239438 - Sales Order No. should be removed in Call entry when you delete the Sales Order

What

Sales Order No. should be removed in Call entry when you delete the Sales Order.

Why

When you, as a Sales Manager, create a Sales Order from a Call entry, the Sales Order No. is filled in on the Call Entry line. When you delete the Sales Order, you expect that the Sales Order No. on the Call Entry line should be deleted too. The Call Entry is not deleted. This issue is fixed.



20.202301.0.0

Release Note • 7/6/2023 • 5 min read

Features

PBI No.	Description
218102	Route planning - Process backorders from worksheet
233683	Exclude blocked customers from call entry creation
234558	Filter on Sales Reason Codes in the Order Entry Page

PBI 218102 - Route planning - Process backorders from worksheet

What

Function Backorder Lines available in Route Planning Worksheet.

Why

When Drink-it Logistics is installed, the route planning worksheet is mostly used for the logistic process and follow up. Following up on backorders is part of that,

How

Search for **Route Planning Worksheet** and select a **route planning line**. Click on the header action **Backorder Lines**. It opens the **Backorder Lines** page, filtered on those sales orders assigned to the route planning no.

PBI 233683 - Exclude blocked customers from call entry creation

What

Exclude blocked customers from call entry creation.

Why

As a sales operator, you are not allowed to register orders for customers that are blocked, so you don't need to call them. You want to be able to exclude them from the call entry creation and you want to be able to see whether a customer is blocked in the call entries, so you are prevented for making unwanted calls.



How 1. Select the Search icon , enter **Create Call Entries** and then choose the related link. 2. On the **Create Call Entries** request page, select options in the Customer Blocked field as necessary. 3. Choose the search icon, enter **Call Entries** and then choose the related link. 4. On the Call Entries page, you can verify whether a customer is blocked in the **Customer Blocked** field.4

PBI 234558 - Filter on Sales Reason Codes in the Order Entry Page

What

Filter on Sales Reason Codes in the Order Entry Page

Why

On the **Order Entry** page, on the **Options** FastTab, you can set a filter on **Reason Codes**. The only relevant reason codes to filter on are the ones that you have selected for sales. You can now only select reason codes that are flagged as "Sales", so the list of codes to select is reduced to the relevant codes only.

How

Setup Reason Codes for Sales

1. Select the Search icon , enter **Reason Codes** and then choose the related link.
2. On th **Reason Codes** page, select the **Sales** field for codes you allow to be used in sales transactions. The field is by default not visible on the page but you van add it by personalization.

On the Order Entry page:

3. On the **Options** FastTab, in the **Reason Code** field, you can only select codes that are flagged for **Sales**.



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Release Note • 7/6/2023 • 6 min read

Features

PBI No.	Description
228131	Include a sequence in which recurring sales lines are shown with the possibility to change that sequence.
232811	Don't create Exclusivity records automatically when new customers are created

Resolved issues

PBI No.	Description
232150	Indirect Sales Register should store system date instead of workdate

PBI 228131 - Include a sequence in which recurring sales lines are shown with the possibility to change that sequence

What

Include a sequence in which recurring sales lines are shown with the possibility to change that sequence.

Why

In a telesales call, your customers might always order products in a certain sequence. In that case, it is helpful if the order entry page shows the line in that same display order. And in next calls, when that sequence changes, you want to be able to apply the change. The product list that you see in the order entry page, depend on the recurring sales lines that are connected to the customer. These recurring sales lines can be generic, so applicable to multiple customers, or specific for a customer. Since this display order is only applicable for the specific customer in the telesales call, you only want to arrange the display order in customer specific recurring sales lines.

How

Adjust the display order in recurring sales lines

1. Select the Search icon  , enter **Recurring Sales Lines** and then choose the related link.



2. On the **Recurring Sales Lines** page, select the code you want to adjust display orders for and then choose the **Edit** action.
3. In the **Display Order** field in the **Lines** FastTab, enter values as necessary. The field is by default not visible, but you can add it by [Personalize](#) your page.
4. Alternatively, you can use the **Move Down** and **Move Up** Line actions.

Adjust the display order in the order entry page 1. Select the Search icon , enter **Sales Orders** and then choose the related link. 2. Choose the **New** action to create a new order or **Edit** an existing order. 3. On the **Sales Order** page, choose the **Order Entry (Ctrl+Alt+N)** action. 4. In the **Display Order** field, enter values as necessary. 5. Alternatively, you can use the **Move Down** and **Move Up** actions.

PBI 232811 - Don't create Exclusivity records automatically when new customers are created

What

Don't create Exclusivity records automatically when new customers are created.

Why

When new customers are created, either manual or by a configuration package, the Allowed and Excluded Item fields were automatically updated. To avoid performance problems and unnecessary data storage, this is not done anymore. There is an action available on the customer card that created the relations/

How

1. Select the Search icon , enter **Customers** and then choose the related link.
2. Choose the **New** action to create a new customer.
3. On the **Customer Card** page, select the *Exclusivity Customer* field as necessary.
4. Choose the **Update Allowed Items** action to fill the Allowed and Excluded Items fields.

PBI 232150 - Indirect Sales Register should store system date instead of workdate

What

Indirect Sales Register should store system date instead of work date

Why



All registers in Business Central use the system date and system time as creation date and creation time. In the Indirect Sales Register, the work date of the user was used. This is corrected.



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Release Note • 7/6/2023 • 7 min read

Features

PBI No.	Description
224460	Missing the lookup in "Exclusivity" Factbox in Item card
225347	Align ASM Call schedule and Call entries with LOG Default- and Source Routes
225376	Add Routes to Call Schedules
225780	Customer default Ship-to Code should be auto filled in Call Schedule Line
225783	Call entry alerts - misc. findings
226438	Create Customer Shipment Dates for Call Schedule Line

Resolved issues

PBI No.	Description
224329	Periodic Settlement - % based on indirect sales amount

PBI 224460 - Indirect sales (GEDAT: Fallback) Price Group

What

Missing lookup in "Exclusivity" FactBox on Item Card.

Why

As a master data manager, you want to be able to see the exclusivity details of an item with one click, so you can do your work in an efficient way.

How

In the **Exclusivity** FactBox on the **Item Card**, you can open the details for:

- The **No. of Standard Sales Codes** where the item is used.



- The **Customer Specific Codes** where the item is **included**.
- The **Customer Specific Codes** where the item is **excluded**.

PBI 225347 - Align ASM Call schedule and Call entries with LOG Default- and Source Routes

Why

A customer has a route which can specify the delivery date, the call entry specifies also the delivery date. Those dates needs to be synchronized so route and calling entries are aligned on shipment dates.

What

When a sales order is created form a call entry with a shipment date, it should check that date with the source routes of the customer and not the default route.

How

When the Shipment Date in a call entry is a Monday, I am able to **Create Order** and **Open Order Entry** from that call entry when the Customer (or Ship-to Code) in that entry has a **Source Route** where the Shipment Day is **Monday** or **[Blank]**. When the Shipment date not align an error appears.

PBI 225376 - Add Routes to Call Schedules

What

Add Routes to Call Schedules

Why

In Aptean Beverage, the shipment date in a sales order can be inherited from a call entry and calculated by a route. As a sales operator, you want to be protected for possible conflicts in calculating the shipment date on orders, so you can do your work in an efficient way.

How

1. Select the Search icon , enter **Customers** and choose the related link.
2. Open the card of the customer you want create or modify call schedule lines for.
3. On the **Customer Card**, choose the **Call Schedule** action.
4. On the **Call Schedule Lines** page, select Routes as necessary. When the selected route is setup with a shipment day, the call schedule line will inherit that day.



PBI 225780 - Customer default Ship-to Code should be auto filled in Call Schedule Line

What

Customer default Ship-to Code should be auto filled in Call Schedule Line

Why

When a customer has a default ship-to code, you want to have that code also included as a default in call schedule lines that you create for that customer.

How

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. On the **Customers** page, open the card for the customer with a default ship-to code where you want to create call schedule lines for.
3. On the **Customer card**, choose the **Call Schedule** action.
4. On the **Call Schedule Lines** page, create a new entry and verify that the **Ship-to Code** field is filled with the correct code.

PBI 225783 - Call entry alerts - misc. findings

What

Alerts on open call entries came also when releasing a sales invoice or return order document and when posting the shipment. That has been corrected, they only come when releasing a sales order with a same shipment date when an open call entry exists with the same shipment date.

Open call entries for which an unlinked order exists with the same shipment date now show in red. The user can link it immediately.

Why

From the **Call entries** page, the user was alerted on existing orders after clicking on the **Make order** button or **Open Order Entry** page. That is in most cases too late (after having called the customer).

How

Open the **Call entries** page, lines show in **red** when a sales order exists for the same shipment date which is not linked to a call entry yet. Click on the action **Link to existing order** and it will show the (first found) order with the same shipment date. Confirm with **Yes** and the call entry will be closed and linked.



PBI 226438 - Create Customer Shipment Dates for Call Schedule Line

What

Customer Shipment dates showing what days a customer may be delivered. Updated from a call schedule.

Why

There may be logistic limitations as to when a customer may be delivered, a customer may perhaps only be delivered on Tuesdays. Such can be steered from LOG source routes, or by ASM CALL schedules.

How

Open the **Customer card** and select action **Call Schedule**. Create a call schedule defining calling day, shipment day and the recurrence and activate the **Create Shipment Dates** function for the customer.

Search for **Customer Shipment Dates**, from the customer card or in general and view allowed shipment dates for the customer.

PBI 224329 - Periodic Settlement - % based on indirect sales amount

What

When a periodic settlement was suggested for indirect sales based on a percentage, the amount was not calculated well. That has been resolved. The Indirect sales Amount is now available as calculated field in the condition ledger entry and in the Condition Period Settlement Journal.



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Release Note • 7/6/2023 • 10 min read

Features

PBI No.	Description
215713	Indirect sales (GEDAT: Fallback) Price Group
219001	Auto release order from Order Entry should be steered by setup
220542	Customer Order multiple per item in the order entry
220543	Customer Order Multiple warning - set per User
220551	Call schedules and call entries extended with "call from" and "call till" time
220339	Don't change the status of a sales order when the order entry page is opened
220541	Item reference customer no (group item references)
222864	Delete open call entries when recreate entries is selected

Resolved issues

PBI No.	Description
215008	ASM Hotfix on 18.202203.0.0 - ASM Setup

PBI 215713 - Indirect sales (GEDAT: Fallback) Price Group

What

Sales prices in the indirect sales journal

Why

Companies may require **prices** for indirect sales for **reporting** reasons and even **periodic settlements** can be calculated as a percentage over the indirect sales amount. The price is merely an internally calculated price, it must not represent the actual price the **Indirect customer** has paid to the **Delivered-by customer**.



How

Open the **Customer card** of the indirect customer and select a **Customer price group**. Create an **indirect sales journal line**, the customer price group is copied from the customer. It can be altered, it could be filled from an interface. The **Unit price LCY** of the indirect sales journal line is calculated just as in a sales order line. The indirect sales journal does not support foreign currencies.

PBI 219001 - Auto release order from Order Entry should be steered by setup

What

Automatic release of sales order on closing the Order Entry page.

Why

When creating the order from a call entry by the Open Order Entry action would create the sales order but leave the status open. It is required to have the order be released automatically.

How

Open the **Advanced Sales Management Setup** page and check field **Release Order On Closing Order Entry**.

PBI 220542 - Customer Order multiple per item in the order entry

What

Define an order multiple per customer per item.

Why Companies may have agreed with customers to order goods in a certain recurring quantity, like per 10 cases (10, 20, 30...) or a customer may only order full pallets.

How

1. On the **Customer card**, on the Advanced Sales Management FastTab, click **Setup Recurring sales lines**.
2. If you want to define order multiple quantities for the customer only, select the line of the customer specific sales code (the one with the same Code as the customer no). Select **Customer Specific Code** action if it does not exist yet.
3. Select that line and click **Card**.
4. Turn on the **Enable Order Multiple** toggle. This adds a new field **Order Multiple** in the lines.
5. Fill in the **Type**, **No**, and **Unit of Measure Code** fields.
6. In the **Order multiple** field, enter the minimum and recurring quantity for that UOM Code.



7. You may fill in the Valid From Date and Valid To date fields, if it is only applicable for orders with a valid **Shipment date**. You can enable order multiple in **all** standard Sales codes, customer specific or general. When **multiple sales codes** were selected for a customer with enabled order multiples a **priority** is applied. First the customer own specific sales code is checked, then specific sales codes for other customers (like a group conditions customer) in sorting order, and at last all other sales codes (in sorting order).
8. Open the **User Setup** and set the **Order Multiple Warning** per user. By default a user will get **No Warning** (allowing him to ignore an order multiple). Change it to **Warning** (allow to deviate, but with a warning) or to **Blocking** (user is forced to key in a conform quantity) to make order multiples effective for the user.
9. Create a **sales order** for the customer.
10. Create **order lines** directly or via the **Order Entry** page. A check is applied when filling in the **quantity** for an item line.

PBI 220543 - Customer Order Multiple warning - set per User

What

Define if a user is allowed to overrule a customer order multiple.

Why

Order multiples can be defined per customer. it should be possible to define what users may deviate from it.

How

Search for **User Setup**. Create a record for each relevant user (who create sales orders). Enable the **Order Multiple Warning** field in the page when not visible yet. By default it is set to **No Warning**, which means the user may deviate from order multiple quantities. That is also the case for users for which **no User Setup** record exists. When set to **Warning** the user may also deviate, but will get a warning in case the quantity in a sales order line or order entry line is less or not conform the order multiple for the sell-to customer. When set to **Blocking** the user may not deviate, must fill in a quantity that is at least the order multiple (minimum quantity) and when higher, it must be conform the order multiple quantity

PBI 220551 - Call schedules and call entries extended with "call from" and "call till" time

What

Call schedules and call entries extended with *Call From Time* and *Call Till Time* information.

Why



When you want to call your customer contact for order entry, that contact might not be available the whole day. In that case, you want to know when he is available for your call.

How

- In the **Call Schedule Lines**, you can fill in the *Call From Time* and *Call Till Time* fields
- When you create **Call Entries**, the *Call From Time* and *Call Till Time* fields will take the values from the schedule.

PBI 220339 - Don't change the status of a sales order when the order entry page is opened

What

Don't change the status of a sales order when the order entry page is opened

Why

When you open a sales order with the status *Released*, you don't want that status to be changed to *Open* when you view the Order Entry page for that order and close it without any change.

How

- Open the **Order Entry** page on a *Released Sales Order*
- Close the page without changing anything.
- The Sales Order is still *Released*.

PBI 220541 - Item reference customer no (group item references)

What

Same Item References for multiple customers.

Why

If you sell items that you and your customer use different terms for, then you can setup a reference between terms for the items and the terms that the customer or vendor of that item uses. This way, the customer's item description, unit of measure, or variant code is automatically inserted on the relevant documents when you fill in the Item Reference No. field.

When multiple of your customers use the same reference, for instance a supermarket chain, you don't want to setup the same reference for every individual supermarket.

How



1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Open the card for a customer for which you want to use an existing reference.
3. On the **Advanced Sales Management** FastTab, select *Bill-to* or *Other* in the **Item Reference On** field.
4. When you have chosen *Other*, then select the other customer in the **Item Reference Customer No.** field.

If you want to use the reference of another customer in an individual sales order:

- Select the other customer in the **Item Reference Customer No.** field on **Advanced Sales Management** FastTab on the Sales Order.

PBI 222864 - Delete open call entries when recreate entries is selected

What

Delete open call entries when recreate entries is selected.

Why

Call schedules for customers can be changed. You can for instance change the calling day from Monday to Tuesday. In that case, you don't want to see the open entries for the Monday anymore.

How

1. Select the Search icon , and then choose the related link.
2. Select the customer you want to recreate a call schedule for and choose the Edit action.
3. Choose the **Call Schedule** action and fill in the fields as necessary on the Call Schedule Lines. Hover over a field to read a short description.
4. Choose the Create **Call Entries** action and select *Recreate Entries*.

PBI 215008 - ASM Hotfix on 18.202203.0.0 - ASM Setup

What

Installation error on the Aptean Beverage Advanced Sales Management App.

Why

When a company in your Business Central environment did not have a record in the Advanced Sales Management Setup yet, the App could not be installed.

How



The problem with the installation is solved.



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Release Note • 7/6/2023 • 8 min read

Features

PBI No.	Description
179469	Add Logistical information to Order Entry Page
211690	Customer service - Process backorders before shipment based on qty to ship/qty picked
214087	Show Alerts on order entry lines
216735	Exclude Blocked Items in Recurring Sales Lines
217469	Customer relations - Indirect sales requisition - base

Resolved issues

PBI No.	Description
215078	Show Alert in Order Entry header
215081	Setup Alerts on Order Entry - error on deleting ending date
218705	Indirect sales journal - Document date should get default value from posting date

PBI 179469 - Add Logistical information to Order Entry Page

What

Add Logistical information to Order Entry Page

Why

As a sales operator, you want to be able to inform your customer how and when his order will be shipped. You also want to be able make changes when he requests for that, so you can give him all the necessary service.

How

On the **Order Entry** page, **Options** FastTab, in the *Logistics* section (show more), you can see and edit



- the Route
- Shipment Date
- Shipment Method Code
- Delivery Time Code

In the **Customer Details** FactBox, you can see:

- **Salesperson Code and Salesperson Name** In the **Logistics** FactBox, you can see:
- The Delivery from time
- The Delivery to time
- Nonworking Day

PBI 211690 - Customer service - Process backorders before shipment based on qty to ship/qty picked

What

Process backorders even before shipment, based on the Quantity to ship.

Why

Companies do the 'customer service' on backorders mostly before the shipment. After picking it is clear that some quantities were not available. Salespeople can call customers from the Backorder Lines function and decide with the customer further actions (deliver, postpone; backorder, no backorder..). it should be possible to do so based on the Qty to ship from the sales order line or the warehouse shipment line.

How

When the location is setup without warehouse activities: adjust the **Qty to Ship** in the **sales order line** to the available quantity (what is reported back on a picking list). When the location is setup with warehouse activities the **Qty to Ship** is set on the **warehouse shipment line**, from registered picks, or set manually. Open the **Backorder Lines** page. select the sales order lines and set the Backorder type field to: **Backorder in Order** (order lines stays open), **No Backorder** (order line will be closed, quantity updated and original quantity saved) or **Backorder in Blanket order** (same, but with the unavailable quantity copied to a new Blanket order line to be followed up later). Then click on **Process Backorder**.

PBI 214087 - Addition of field "Customer Name 2" on the Call Entries Page

What

Setup Alerts on order entry, integration with E-commerce.



Why

- In the beverage industry, it is common practice to sell products pro-actively. When talking with a customer, you might want to notify your customer for:
- Available Promotions for a product.
- Possible Discounts for a product.
- Possible Charges for a product.
- Cross-selling opportunity of a product (if you buy gin, do you also need tonic?)
- Upselling a product (if a product with a low margin is ordered, recommend for a similar product with higher margin)

How

Define your condition line alerts policy

1. Select the Search icon , enter **Advanced Sales Management Setup**, and then choose the related link.
2. On the **Alerts** FastTab of the **Advanced Sales Management Setup** page, select your policy for the condition alerts in the **Order Entry Condition Alerts** field.

Note

For performance reasons, we recommend to set your policy to On Demand, so you still are able to do your order intake very fast

Use condition line alerts in the order entry page 1. Select the **Order Entry** action from a Sales Order or Call Entry. 1. In the **Alerts** FastTab select which alerts you want to see for the products in the lines in the **Show Condition Line Alerts** field. Once selected, the system will keep this choice but you can always change. 1. If your line alerts policy is **On Demand**: * Choose the **Calculate Condition Alerts** action to create condition alerts for the lines in the page. 1. In the lines of the page, the **Sales Alerts** field shows: * **Cross-sell** when a Cross-sell item is available for the item in the line. * **Upsell** when a Upsell item is available for the item in the line. * **Multiple** when a Cross-sell item and an Upsell item is available for the item in the line. 1. In the lines of the page, the **Condition Alerts** field shows (depending on the Show Condition Line Alerts field): * **Discount** when a discount is available for the item in the line. **Promotion** when a promotion item is available for the item in the line. * **Charge** when a charge is available for the item in the line. * **Multiple** when at least two condition alerts available for the item in the line.

PBI 217469 - Addition of field "Customer Name 2" on the Call Entries Page

What

Customer name 2 in call entries.



Why

Customers part of a big group (like a hotel chain) may have the group name as customer name and their specific affiliate/branch name in the customer name 2 field. It is relevant to distinguish them in the calling entries.

How

Personalize page **Call entries**. Add field Customer name 2. Run function **Create Call entries** possibly with option **Recreate Entries**. Open the **Call entries** page. Column Customer name 2 will show.

PBI 216735 - Exclude Blocked Items in Recurring Sales Lines

What

Exclude Blocked Items in Recurring Sales Lines

Why

As a sales operator, you can't sell items that are blocked. But when a blocked item is included in a recurring sales code, it is still shown in your sales documents when recurring sales lines are inserted. You want to be prevented for this, so you can do your sales process in a correct and efficient way.

How

- When an Item is flagged as **Blocked**, it is also blocked in all **Standard Sales Lines** where it exists.
 - In the Standard Sales Lines, you can see this in the **Blocked** field, but you can not change it.
 - When Recurring Sales Lines are inserted in documents, the lines that are blocked are not included.
Documents are:
 - Sales Quote
 - Sales Order
 - Sales Invoice
 - Sales Credit Memo
 - Return Entry
 - Order Entry
 - When you **unblock the Item**, then all **Standard Sales Lines** where the Item exists are also unblocked.

PBI 215078 - Show Alert in Order Entry header

What



Show Alert in Order Entry header - issue with Starting Date and Ending Date

Why

The filter on the Ending Date for New and Seasonal product was not executed well in the Order Entry page. This is solved.

PBI 215081 - Setup Alerts on Order Entry - error on deleting ending date

Fixed

When you notified an Items as **New**, **Seasonal**, **Cross-sell** or **Upsell** Item with an Ending Date and then deleted that **ending date**, the system did not allow that and gave an error message. This is solved.

PBI 218705 - Indirect sales journal - Document date should get default value from posting date

What

The document date was not filled by default in the indirect sales journal. It would result in an error when posting. That has been resolved. The Document date is now filled by default from the posting date.



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Features

PBI No.	Description
188700	Setup Alerts on order entry, integration with E-commerce
194199	Use a standard reason code for web quotes and orders
196820	Customer statistics on indirect volumes
196870	Customer relations - Indirect sales requisition - base
210277	Shipment date on Call entries are not updated after order is created
210328	Add City to the call entry page
210329	Mandatory Customer order Number on Order Entry Page
211905	Show Alerts on order entry, integration with E-commerce
212950	Structured Reason codes - Copy

Resolved issues

PBI No.	Description
211656	Error message in Order Entry page on Select Blanket Order Lines when there is no blanket order for the customer
211721	Use the Shipment Date for inventory availability check

PBI 188700 - Setup Alerts on order entry, integration with E-commerce

What

Setup Alerts on order entry, integration with E-commerce.

Why



In the beverage industry, it is common practice to sell products pro-actively. When talking with a customer, you might want to notify your customer for:

- New or seasonal products
- Available Promotions
- Possible Discounts
- Cross-selling (if you buy gin, do you also need tonic?)
- Upselling (if a product with a low margin is ordered, recommend for a similar product with higher margin)

You want to be able to setup and steer the notifications that the sales order operator sees on his screen, so he can optimize the sales with your customers.

How

1. Select the Search icon , enter **Items**, and then choose the related link.
2. Open the card of the item for which you want to set the notification.
3. On the **Advanced Sales Management** FastTab, you can execute the **Notify as** and **Notify for** actions.
4. When you choose these actions, the **Sales Notification** page opens. Fill in the fields as necessary. Hover over a field to read a short description.

There is no additional setup necessary for showing discounts and promotions alerts.

PBI 194199 - Use a standard reason code for web quotes and orders

What

Use a standard reason code for web quotes and orders.

Why

In Aptean Beverage Sales-Purchase Conditions, you can setup sales conditions where a reason codes is a criterium for a condition. For quotes and orders that are created in the web shop, you might want to be able to include, or exclude specific conditions by the use of a reason code, so you can distinguish web quotes and orders from the others. To facilitate this, you can set reason codes that are used in sales quotes and sales orders that are coming from the web.

How

In the **Drink-IT Foundation Setup**, in the **Advanced Sales Management** section of the **Default Reason Codes** FastTab, you can select the reason codes that you want to use for sales quotes and sales orders that are created from the web. Orders that are created by a webshop can make use of these setup fields.



PBI 196820 - Customer statistics on indirect volumes

What

Customer statistics on indirect volumes.

Why

As a sales manager I want to see sales statistics directly on a customer card, based on volumes.

How

- From the **Customer List** page, or **Customer Card** page, you can execute the **Statistics** action (F7) to open the **Customer Statistics** page.
- On the **Advanced Sales Management** FastTab, Indirect Sales volumes are shown in your primary and secondary volume.

PBI 196870 - Customer relations - Indirect sales requisition - base

What

Customer relations - Indirect sales requisition - base

Why

We have indirect customers for who we require sales information. We do that by sending a request to our direct customers (distributors) who deliver to them. When we get that information we register it through the indirect sales journal.

It should be possible to send an email to a direct customer with a request to send the information. The email should have an excel sheet attached with lines for (indirect) customers that are related and for relevant items, and for a relevant period. It should be possible to follow up: which distributors have and which have not send back the information.

How

With this release we are able to register Direct and Indirect Customers. Next to that you are now able to request sales information from your indirect customers.

In the **Customer Relations** page, you can select:

- **Requisition period**; options: None,Day,Week,Month,Quarter,Year,Custom
- **Period dateformula**: if Custom, user can fill like 2W, 6M etc.



This specifies the period interval over which indirect sales information is requested.

New table/page **Indirect sales requisition** Specifies requests sent for indirect sales information

- Fields
 - *Customer Relation Entry No.*
 - *Indirect sales requisition ID*
 - *User ID*
 - *Start period*
 - *End Period*
 - *Date sent*
 - *Status: New, Sent, Received, Canceled (user can change manually)*

Added to Customer relations:

- flowfields **Last Indirect Sales requisition date** and **Last Indirect sales requisition Status**
- drill down opens the Indirect sales requisition lines linked to the Customer relation entry

Added to customer card:

- field: **Indirect Sales Contact**: select a contact person of the customer
 - Specifies the contact person to whom the request for indirect sales will be sent.
- Action: Send request for indirect sales information
 - Can only be activated (dynamically show or not) for customers with Customer relation = yes
 - User must fill in Starting date and ending date
 - Create email (setup text for subject, salutation, body and footer text) to the Indirect sales contact person
 - attach an XLS
 - layout as in indirect sales journal: function Export to excel (see related PBI)
 - with lines for all customer related to the customer, with Customer relation
 - Status = Certified
 - Start date and End date fall within the period
 - in XLS lines : Starting date and ending date according to the Requisition period of the customer relation
 - when multiple periods fall within the starting and ending date of the request page, create it for each
 - for each item within the item range a line
 - Creates a new record in table Indirect Sales requisition; status is Sent.



PBI 210277 - Shipment date on Call entries are not updated after order is created

What

Shipment date on Call entries are not updated after order is created

Why

When call entries are created, the shipment date of the entry is filled with the date according to the call schedule of the customer. When an order is created from, or connected to a call entry it is useful to see the shipment date of that order when it was changed.

How

When the shipment date in a sales order is changed, the call entry that is connected to that order will be updated with the new value.

PBI 210328 - Add City to the call entry page

What

Add City to the call entry page

Why

When you start a call with your customer, it is useful to see the city where he is located.

How

In the Call Entries page, the field **City** is visible.

PBI 210329 - Mandatory Customer order Number on Order Entry Page

What

Mandatory Customer order Number on Order Entry Page.

Why

Your customers might request to mention their internal order number on invoices that you send to them.

You want to prevent yourself for creating multiple orders with the same reference.



How

To make sure you don't forget to fill in this number for a customer in the **External Document No.** field on the Order Entry page:

Specify the default for all customers; 1. Select the Search icon , enter **Advanced Sales Management Setup**, and then choose the related link. 1. Select the **Ext. Document No. on Release** mandatory field. 1. Select the **Ext. Document No. Unique** field if you want the program to check whether the number is unique for the customer.

Note: the check if the number is unique for a customer is done on Sales Orders and Sales Return Orders, not on posted shipments or invoices.

PBI 211905 - Show Alerts on order entry, integration with E-commerce

What

Show Alerts on order entry, integration with E-commerce.

Why

In the beverage industry, it is common practice to sell products pro-actively. When talking with a customer, you might want to notify your customer for:

- New or seasonal products
- Available Promotions
- Possible Discounts
- Cross-selling (if you buy gin, do you also need tonic?)
- Upselling (if a product with a low margin is ordered, recommend for a similar product with higher margin)

As a Sales operator, you want to be able to see these notification on the Order Entry screen, so you can optimize the sales with your customers.

How

1. Open the **Order Entry** page, from a Sales Order or from a call entry.

2. On the **Alerts** FastTab, you can:

- View **New Items** that are available for this customer.
- View **Seasonal Items** that are available for this customer.
- View **Promotions** that are available for this customer.
- View **Discounts and Charges** that are available for this customer.



Note In the next release (May 2022), notifications for discounts, promotions, cross-sell and upsell are foreseen on the line level in the Order Entry page.

PBI 211905 - Structured Reason codes - Copy

What

Structured Reason codes

Why

When ordered goods are not available for shipment, you can decide to hold them in backorder or not. You can manage this with the use of reason codes.

How

1. Select the Search icon , enter **Reason Codes**, and then choose the related link.
2. Open the card of the code for which you want to specify the use.
3. On the **Advanced Sales Management** FastTab, select a type in the **Backorder Type** field.

PBI 211656 - Fix- Error message in Order Entry page on Select Blanket Order Lines when there is no blanket order for the customer

Fixed

When you executed the action **Select Blanket Order** on the **Order Entry** page, and there was no Blanket Order available for the customer, the system threw an error message. This is solved.

PBI 211721 - Use the Shipment Date for inventory availability check

Fixed

In the Sales Order page, the inventory availability check is executed against the shipment date of the order. In the Order Entry page, this was not the case. This is solved.



18.202201.0.0

Release Note • 7/6/2023 • 7 min read

Features

PBI No.	Description
196771	Indirect Sales entries - Base
196772	Customer relations - Base
201827	External Document No. mandatory per Customer
201828	Customer service - Follow up on Backorders on Sales
201857	Order Entry - Select quantity in Get Blanket Order lines
201875	Item Ref. No in Order Entry

Resolved issues

PBI No.	Description
208793	Partial Substitution Order Entry page error

PBI 196771 - Indirect sales entries - Base

What

Indirect Sales entries - base

Why

With the Customer relations - Base feature, we introduced the registration of indirect sales customers. Next to this, you might want to register sales volumes and report on it. The indirect sales journal enables you to create indirect sales entries that make this possible.

How

1. Select the Search icon , enter **Indirect Sales Journal**, and then choose the related link.



2. Select the relevant journal, and then choose OK.
3. Fill in the fields as necessary. Hover over a field to read a short description.
4. Choose the Post action to post the journal.

PBI 196772 - Customer relations - Base

What

Customer relations - Base

Why

In the beverage industry, it is common practice to register indirect sales. What we mean with indirect sales, can be explained by this user story:

We have customers who get delivered by us, and we have customers who get delivered (and invoiced) by distributors (direct customers of us). We call them outlets. Nevertheless, we consider these outlets as 'our' customers, our salespersons visit them regularly, we support them (facilitating loan in use items, investments), promise them free POS items, and even give year end bonuses.

As a sales manager I want to be able to create such indirect customers and link them to one or more direct customers by who they get delivered (customer relations).

How

Register direct and indirect customers in the Indirect Sales section of the Advanced Sales Management FastTab on the customer card:

- Register a customer as a distributor (Direct Customer) in the **Customer Relations** field.
- Identify a customer as a Direct or Indirect customer in the **Customer Type** field. An indirect customer can not have Customer Relations. A customer is by default a direct customer.
- Select the **Indirect Sales Contact** for the Direct Customer.
- Select the **Delivered-by Customer** for the Indirect Customer. Use the Assist-Edit button when there are multiple direct customers that deliver to the indirect customer.
- Select the Indirect Customers for a Direct Customer in the **No. of Indirect Customers** field.

Also in this release:

- **Post** Indirect Sales and create indirect sales entries.

In the next release, you will be able to:

- **Request** for Indirect Sales.
- **Import** Indirect Sales from a file in a Journal.



- **Manage Periodic Sales Conditions** for indirect sales.

PBI 201827 - External Document No. mandatory per Customer

What

External Document No. is mandatory should be possible to setup per customer and should not give an error during posting but give the indication of the missing field during release of the sales documents.

Why

Standard Business Central only gives the error during posting, this is too late.

How

Setup :

- Advanced Sales Management Setup
 - Enable the field "Ext. Document on Release Mandatory"
- Customer Card
 - Ext. Document No. on Release Mandatory.
 - options
 - Default (yes) or Default (no) ; the 'yes' or 'no' coming from ASM setup
 - Yes
 - No
- Sales Order and Sales Return Order will inherit the setup from the sell-to customer. If Ext. Document No. is mandatory the following processes are blocking
 - Approval Request
 - Release
 - Posting Post Prepayment (only for Sales Order)

PBI 201828 - Customer service - Follow up on Backorders on Sales

What

Customer service - Follow up on backorders on sales.

Why



Recurring orders are common in the beverage industry. Customers may order on a regular weekly base. It may happen that an item is not available. Rather than keeping the sales order line open for backorder, company and customer often agree to close that line. The customer will place a new order anyway the next week and order it again.

How

A new field is introduced in the sales line: backorder type, with options Backorder in order (std BC), No backorder and Backorder in Blanket order.

A new page Backorder lines enables you to view order lines not (fully) shipped. A user can set filters to salesperson, customer and shipment date. The fact box enables you to call or mail a customer. The user can change the backorder type per line and activate Process backorder for all selected lines. It will close sales order lines (adjust Quantity, save original Quantity). For lines set to 'Backorder in Blanket order' it creates a new blanket order (line) for the remaining quantity, referring to the original order and quantity.

The backorder type can be set with a default value in the reason code.

PBI 201857 - Order Entry - Select quantity in Get Blanket Order lines

What

Order Entry - Select quantity in Get blanket order lines.

Why

Improve the efficiency of the sales order intake process.

How

When you execute the action Get Blanket Order Lines on the Order Entry page, enter a Selected Quantity. The field is by default filled with the Outstanding Quantity of the Blanket Order Line, but you can change it. The Quantity field in the Order Entry line will be filled with the Selected Value.

PBI 201875 - Item Ref. No in Order Entry

What

Item Ref. No in Order Entry

Why

When you want to do the sales order intake, you might want to use the product number from the customer.

How



On the Order Entry Page, on the Quick Entry FastTab, I can fill in.

- **Item Reference No.**
 - The field is Hidden
 - Specifies the referenced item number.
- The field works similar to the same field in the Sales Line. Item No. is filled in with the corresponding value.
- The field is also available in the lines. Also hidden, same function and tooltip.

PBI 208793 - Partial Substitution Order Entry page error

Fixed - Partial Substitution Order Entry Page error.



Introduction

Article • 1/10/2024 • 1 min read

The Aptean Beverage Advanced Sales Management (ASM) extension, Drink-IT Edition, streamlines sales order intake through a fast entry page that offers sorting and filtering options for items while displaying historic information. By incorporating recurring sales lines that represent your product lists, the order intake process becomes remarkably efficient.

For proactive customer order management, the Calling List feature proves indispensable, facilitating seamless order capture. Moreover, in scenarios where exclusivity matters—such as selling specific items solely to designated customers or restricting certain products for particular clientele—the Aptean Beverage Advanced Sales Management extension helps you prevent unauthorized sales.

Note

All the fields mentioned in the document are not available by default in the Business Central. Such fields can be viewed after personalization.

Business Processes

- [Release notes](#)
- [Create your own DEMO company](#)
- [Getting started](#)
- [Setting up Advanced Sales Management](#)
- [Design detail](#)
- [Training](#)
- [Business process walkthroughs](#)



Create your own demo company

Article • 2/7/2025 • 4 min read

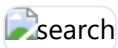
The Apteian Beverage is available in multiple countries. For each country, a dedicated demo company is available. This country specific company contains setup that is specific to that country (VAT, excise, language, etc.). They are all based in the Business Central CRONUS company for that country. With this company, you can:

- Verify the example [Setup](#).
- Execute the [Walkthroughs](#) in our online documentation.

Install Drink-IT

1. Select the Search icon , enter **Extension Marketplace**, and then choose the related link.
2. In the Search box, enter **Apteian Beverage Drink-IT Edition**.
3. Select the Bundle that meets your business requirements.
4. Choose the **Free trial** action and install the app.

Create the demo Company

1. Select the Search icon  , enter **Data Import Wizard**, and then choose the related link.

The **Data Import Wizard** page opens.

2. Select **Next**.
3. In the **Company Selection** field, select *New Company*.
4. In the **New Company Name** field, enter a name.
5. Select **Next**.
6. Select the **Upload a file to import** link and then select the .zip file for your country.
7. Select **Next**.
8. Select **Finish** to create your demo company. This will take one hour or more.

Note

Names and codes in your demo company can differ from the ones used in the walkthroughs. Since the Apteian Beverage setup is the same for all the countries, the walkthroughs can be used in every country. For the country specific deviations, you can verify these deviations.



Setting up Advanced Sales Management

Article • 7/6/2023 • 1 min read

Before you can start using the Apteau Beverage Advanced Sales Management extension, there are a few things to setup. You need to define, for example, your calling teams and call statuses.

The following table describes a sequence of tasks, with links to the topics that describe them.

To	See
Set up permission sets	Manage permission sets
Create your call statuses	Setting up call statuses
Define the "order created" call status in the Advanced Sales Management set up	Advanced Sales Management setup
Set up calling groups to organize your calling lists	Setting up order entry groups
Set up customers for calling lists	Setting up customers for calling lists
Define call schedules and create call entries for customers	Setting up call schedules
Set up recurring sales	Setting up recurring sales
Set up exclusivity on items and customers	Setting up exclusivity on item
Use recurring sales lines to speed up the order intake	Maintain recurring sales lines
Make use of sales alerts to optimize your sales	Setting up sales alerts
Register indirect sales	Register indirect sales
Use Order Multiple per Item in sales	Setting Up Order Multiple per Item

Manage permission sets

Article • 10/23/2024 • 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 *ADVSALESMGMT106FDW*.

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 *ADVSALESBASMGT106FDW*.

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.



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



Setting up call statuses

Article • 7/6/2023 • 2 min read

Call Statuses within the calling lists provide crucial insights into your planned and closed calls, offering valuable information. You can also create custom statuses as per your specific needs.

Modifying the status of a call entry can trigger the automatic closure of the entry. This functionality proves beneficial, especially in scenarios where an order has been successfully created following the call, or when the call doesn't lead to any sales.

1. Select the Search icon , enter **Call Statuses**, and then choose the related link.
2. On the **Call Statuses** page, choose the **New** action.
3. Fill in the fields as necessary. Hover over a field to read a short description.



Advanced sales management setup

Article • 7/6/2023 • 2 min read

1. Select the Search icon , enter **Advanced Sales Management Setup**, and then choose the related link.
2. On the **Advanced Sales Management Setup** page, fill in the fields as necessary. Hover over a field to read a short description.



Setting up call entry groups

Article • 7/6/2023 • 3 min read

Call Entry Groups represent the teams that are responsible for the execution of the call entries. A group consists of one or more [Users](#) in the system.

1. Select the Search icon  , enter **Call Entry Groups**, and then choose the related link.
2. On the **Call Entry Groups** page, fill in the fields as necessary. Hover over a field to read a short description.

To add members to the group

1. Select the Search icon  , enter **Call Entry Groups**, and then choose the related link.
2. Select the group you want to add members to.
3. Choose the **Edit** action.
4. Select the users that you want to add.

See also

[Create Users According to Licenses](#)



Setting up customers for calling entries

Article • 7/6/2023 • 5 min read

When you regularly contact your customers to take their orders, using call entries is a great way to start. This list tells you who to call each day and gives you all the information you need to begin the call and take their orders right away.

Setting up customers for call entries

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the customer you want to set up for calling entries and choose the **Edit** action.
3. On the **Call Entry** section, on the **Advanced Sales Management** FastTab of the **Customer** page, fill in the fields as necessary. Hover over a field to read a short description.

Setting up call schedules for customers

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the customer you want to create a call schedule for and choose the **Edit** action.
3. Choose the **Call Schedule** action and fill in the fields as necessary on the **Call Schedule Lines**. Hover over a field to read a short description.
4. You can now create the call entries for the customer, or alternatively do this in the regular **batch**.

Create call entries

1. Select the Search icon , enter **Create Call Entries**, and then choose the related link.
2. On the **Create Call Entries** page, fill in the fields as necessary. Hover over a field to read a short description.
3. Choose **OK** to create the entries.

See also

[Register New Customers](#)



Setting up shipping addresses for calling entries

Article • 7/6/2023 • 3 min read

Setting up shipping addresses for calling entries

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the customer with the shipping address you want to set up for calling entries for and choose the **Edit** action.
3. Choose the **Ship-to Addresses** action and then choose the **Edit** action.
4. On the **Order Entry** FastTab of the **Ship-to Address** page, fill in the fields as necessary. Hover over a field to read a short description.

Setting up call schedules for shipping addresses

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the customer with the shipping address where you want to set up call schedules for and then choose the **Edit** action.
3. Choose the **Ship-to Addresses** action and select the shipping address where you want to set up call schedules for and then choose the **Edit** action.
4. Choose the **Call Schedule** action and fill in the fields as necessary on the **Call Schedule Lines**. Hover over a field to read a short description.



Setting up recurring sales

Article • 7/6/2023 • 5 min read

Customers in the beverage industry often order the same products, with a recurring pattern. The recurring frequency can be setup by [creating call schedules](#), and the product list can be managed with recurring sales lines.

To set up recurring sales lines

1. Select the Search icon , enter **Recurring Sales Lines**, and then choose the related link.
2. On the **Recurring Sales Lines** page, choose the **New** action.
3. On the **General** FastTab, fill the fields as necessary. Hover over a field to read a short description.
4. On the **Lines** FastTab, enter information in the fields to prepare sales lines that reflect the standard lines that you expect to use as recurring lines on sales documents.

In Aptean Beverage Advanced Sales Management, you can make a **customer specific recurring sales line**. With this feature you can create product lists that are customized for one, or multiple, customers only.

To assign recurring sales lines to a customer

Assign one or more recurring sales lines to a customer so that they are available to insert on sales documents for that customer.

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Open the card for a relevant customer.
3. On the **Advanced Sales Management** FastTab, in the **Exclusivity** section, in the Recurring Sales Lines field, click the **Set recurring sales lines** action.
4. On the **Recurring Sales Lines** page, select codes for the recurring sales lines that you want to be able to insert on sales documents for the customer, or choose the **Customer Specific Code** action to create a product list for this customer.
5. Fill in the additional fields to define when, how, and where the recurring sales lines are to be used.
6. In the five fields where you select how the lines are inserted on four document types, select one of the following options:

Option	Description
Manual	You must manually look up and insert a recurring sales line that exists for the customer.



Automatic	Automatic If multiple recurring sales lines exist for the customer, you will get a notification from where you can pick which one to insert. If only one recurring sales line exists, it will be inserted automatically. Note that this only works if the new document was created from a document list, for example by choosing the New action on the Sales Orders page. It does not work if the document was created from a customer card, for example.
Always Ask	A notification appears and all existing recurring sales lines are shown so that you can select one.

7. Choose the **Update Exclusivity Items** action to apply the changes.

In Aptean Beverage Advanced Sales Management, these recurring sales lines can have an **Exclusivity Type**:

- **Include**: items that are part of an include list are by included, which means that the customer is allowed to buy the item.
- **Exclude**: items that are part of an exclude list are by excluded, which means that the customer is not allowed to buy the item.
- **Mixed** : only customer specific recurring sales lines can be mixed. On these product lists, you can select the **Exclusivity Type** per item, *Include* or *Exclude*.

The Code of a **Customer Specific Recurring Sales Line** is equal to the number of the customer, so they are easy to identify. It is possible to use a customer specific on another customer, but you will get a warning and you need to confirm explicitly to assign it.

On the Advanced Sales Management FastTab of the customer card, you can see:

- **Allowed Items**: the total number of items that the customer is allowed to buy. You can DrillDown to see the list of items.
- **Allowed Exclusive Items** the total number of exclusive items that the customer is allowed to buy. You can DrillDown to see the list of items.
- **Excluded Items**: the total number of items that the customer is not allowed to buy. You can DrillDown to see the list of items.

See also

[Setup Standard Lines for Recurring Sales and Purchases - Business Central | Microsoft Docs](#)

[Setting Up Item Exclusivity](#)



Setting up item exclusivity

Article • 7/6/2023 • 4 min read

When you produce private label items, you want to be prevented for selling them to customers that are not allowed to buy these items. When items are flaggedged as Exclusivity Items, you are only able to sell them to customers where the item is allowed.

To make an item exclusive

1. Select the Search icon , enter **Items**, and then choose the related link.
2. Open the card for the private label item.
3. Select the **Item Exclusivity** check box on the Advanced Sales Management FastTab to make the item exclusive.

Exclusive Items are by default not available for a customer. You will only be able to sell it to a customer when:

- The Item is *included* in a [recurring sales](#) code that is connected to the customer.
- The Item is manually *selected as allowed* for a customer.

To allow an exclusive item for a customer

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Open the card for the customer where you want to allow an exclusive item.
3. On the **Advanced Sales Management** FastTab, drilldown on the **Allowed Exclusive Items** field.
4. On the **Exclusivity Items** page, choose the **New** action.
5. Select the exclusive item and then choose the **Update** action.

Note

Updating the allowed and excluded items for customers requires the update actions on the **Recurring Sales Lines** page and the **Exclusivity Items** page. These actions can also be executed in the background, by creating a Job Queue Entry for Report 2013910 Update Exclusivity Items.



Maintain recurring sales lines

Article • 7/6/2023 • 3 min read

When recurring sales lines are used, you need to maintain them by

- Assigning new products to existing recurring sales lines.
- Adding products to recurring sales lines.

To add an item included to standard sales codes

1. Select the Search icon , enter **Items**, and then choose the related link.
2. Open the card for the item you want to add to standard sales codes.
3. Choose the **Include in Standard Sales Codes** action on the Advanced Sales Management FastTab.
4. Select the Standard Sales Codes where you want to add the Items as included.
5. Click **OK**.

To select items in recurring sales lines

1. Select the Search icon , enter recurring sales lines, and then choose the related link.
2. Choose the **Add Items** actions.
3. On the **Add Items to Standard Sales Code** page, use filters to select items and set the Exclusivity Type.
4. Click **OK** to add the selected items to the recurring sales lines.



Setting up sales alerts

Article • 5/29/2025 • 2 min read

In the beverage industry, it is common practice to sell products pro-actively. When talking with a customer, you might want to notify your customer for:

- New or seasonal products
- Available Promotions
- Possible Discounts
- Cross-selling (if you buy gin, do you also need tonic?)
- Upselling (if a product with a low margin is ordered, recommend for a similar product with higher margin)

With the Apteian Beverage Advanced Sales Management extension, you can setup and steer the notifications that the sales order operator sees on the screen while doing the order intake, thereby optimizing the sales with your customers.

1. Select the Search icon , enter **Items**, and then choose the related link.
2. Open the card of the item for which you want to set the notification.
3. On the **Advanced Sales Management** FastTab, you can execute the **Notify as** and **Notify for** actions.
4. When you choose these actions, the **Sales Notification** page opens. Fill in the fields as necessary. Hover over a field to read a short description.

There is no additional setup necessary for showing discounts and promotions alerts.

See also

[Fast order entry](#)



Register indirect sales

Article • 7/6/2023 • 8 min read

If you do business with for instance resellers of your products, you might want to know, and register, the volumes that these direct customers sold to their (indirect) customers. Apteau Beverage Advanced Sales Management supports the process from request until registered indirect sales entries with the possibility to give bonuses for these sales in the Apteau Beverage [Sales-Purchase Conditions](#).

Setting up direct customers for indirect sales

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select, or create as new, the customer you want to use as a customer with indirect sales and choose the **Edit** action.
3. On the **Indirect Sales** section of the **Advanced Sales Management** FastTab, select the *Customer Relations* field, choose **Direct** in the **Customer Type** field and select a contact in the *Indirect Sales Contact* field if applicable.

Setting up indirect customers for indirect sales

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select, or create as new, the customer you want to use as a customer with indirect sales and choose the **Edit** action.
3. On the **Indirect Sales** section of the **Advanced Sales Management** FastTab, choose **Indirect** in the **Customer Type** field and select the direct customer in the *Delivered-by Customer No.* field.

Setting up the customer relations

When both the Direct Customer and the Indirect Customer are setup, you can define the customer relations. These relations are about the products that the direct customer sells to the indirect customer and the requisition of sales information.

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the direct customer where you want to maintain the relations for and choose the **Edit** action.
3. On the **Customer Card** page, open the details in the *No. of Indirect Customers* field in the Indirect Sales section of the **Advanced Sales Management** FastTab.
4. On the **Customer Relations** page, choose the **Edit List** action. Fill in the fields as necessary. Hover over a field to read a short description.



Register the indirect sales in the indirect sales journal

Once you have received the indirect sales volumes from you customer, you can register the in the Indirect Sales Journal. This journal uses journal templates and journal batches. When journal entries are posted, **Indirect Sales Entries** are created, that you can use for reporting. There is no posting to the general ledger.

1. Select the Search icon , enter **Indirect Journal Templates**, and then choose the related link.
2. On the **Indirect Journal Templates** page, choose the **New** action.
3. Enter a name and a description for the template.
4. Choose the **Batches** action.
5. On the **Indirect Journal Batches** page, fill in fields as necessary. Hover over a field to read a short description.

Now you are ready to create entries in the **Indirect Sales Journal**.

6. Select the Search icon , enter **Indirect Sale Journal**, and then choose the related link.
7. Open the relevant general journal batch.
8. On a new journal line, fill in the fields as necessary. Hover over a field to read a short description.
9. Repeat step 8 for all the separate transactions that you want to post.
10. Choose the **Post** action to record the transactions in the Indirect Sales Entries.

Bonuses and promotions on indirect sales

When the Aptean Beverage Advanced Sales Management is used in combination with the Aptean Beverage [Sales-Purchase Conditions](#), you can make use of all the functions of that app to give (periodic) bonuses and promotion. You can check the details about this in the [product documentation](#) of the Sales and Purchase Conditions app.



Setting up order multiple per item

Article • 7/6/2023 • 5 min read

For logistical or commercial reasons, you can agree with your customer that they order products only in a multiple quantity. For instance, quantities that make a full pallet. The order multiple function can give a warning or a block during the sales order intake.

Setting up your order multiple policy per user

1. Select the Search icon , enter **User Setup**, and then choose the related link.
2. On the **User Setup** page, choose the policy per user in the *Order Multiple Warning* field.

Setting up customer specific order multiples

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the direct customer where you want to set the order multiple policy for and choose the **Edit** action.
3. On the **Customer Card** page, open the details in the *Setup recurring sales lines* field.
4. On the **Recurring Sales Lines** page, select, or create as **New** the line with customer specific code and then choose the **Card** Action.
5. On the **Standard Sales Lines** Card, select the *Enable order Multiple* field and confirm the message.
6. Fill in quantities in the *Order Multiple* field. If the line already contains a value in the Quantity field, it will be reset to 0,00 and you need to fill it in again.

Setting up general order multiples

1. Select the Search icon , enter **Recurring Sales Lines**, and then choose the related link.
2. On the **Recurring Sales Lines** page, select, or create as **New** a line that is not a customer specific code and then choose the **Edit** Action.
3. On the **Standard Sales Lines** Card, select the *Enable order Multiple* field and confirm the message.
4. Fill in quantities in the *Order Multiple* field. If the line already contains a value in the Quantity field, it will be reset to 0,00 and you need to fill it in again.



Design detail

Article • 5/29/2025 • 1 min read

The Sales Order entry feature of the Aptean Beverage Advanced Sales Management extension serves as an efficient alternative for the Business Central Sales Order page. It is fast, user friendly and provides all the necessary information for smooth operations.

This walkthrough provides detailed step-by-step guidance for executing end-to-end business processes that you can perform within the CRONUS BEVERAGE DEMO demonstration company.

To	See
Learn how to use the order entry page	Design details: Fast order entry.



Fast order entry

Article • 5/29/2025 • 4 min read

You can open the **Order Entry** page from a standard sales order. To quickly access this page, use the [keyboard shortcut](#) Ctrl+Alt+N. Some key benefits of using the **Order Entry** page instead of the **Sales Order** page include:

- The **Order Entry** page is only executing the absolute necessary validations. This limits the calculation time enormously, improving performance.
- You can execute the **Print Confirmation** action to print or preview the sales-confirmation report, which follows the setup of the order confirmation report from the sales order.
- You can customize the **Order Entry** page by executing the following actions to show or hide the alerts, options, quick entry, and all tabs.
 - Show / Hide Alerts
 - Show / Hide Options
 - Show / Hide Quick Entry
 - Show / Hide All
- Relevant account receivable information is shown in the **Customer Details** FactBox.
- On the **Quick Entry** FastTab, enter the item, quantity and optionally, a reason code. The system automatically creates a new line in the **Line** section. If a line already exists for the item, the system updates the existing line instead.
- When you select an item, you only see the [allowed items](#) for the customer.
- The item availability is directly shown by the color of the line (Green for available, Olive for partially available, and Red for not available).
- For each item in the lines, the **Sales History** of four user defined historical periods is visible in a FactBox. With [Personalize](#), it is also possible to add this info to the lines.
- The **Line Detail** FactBox shows all necessary information for the item.
- The substitution items can be selected with one click or keyboard shortcut.
- Useful filters are available on the **Options** FastTab. This allows you to switch between product lists, such as from beers to wines, with ease.
- The *Sorting* option helps you to keep the overview on the order.
- With the use of the Search icon at the top of the page, you can reduce the number of lines in the list. To search, select the Search icon, then enter the text in the search box. You can use letters, numbers, and symbols.
- In general, search will attempt to match text across all fields. It doesn't distinguish between uppercase and lowercase characters (case insensitive) and will match text placed anywhere in the field, at the beginning, end, or in the middle.
- On the **Alerts** FastTab, you can view:



- New Items
 - Seasonal Items
 - Promotions
 - Discounts and Charges
- On the **Lines** FastTab, you can view alerts for
 - Cross-sell (if you buy gin, do you also need tonic?)
 - Upsell (if a product with a low margin is ordered, recommend for a similar product with higher margin)
 - Promotions
 - Discounts and Charges
 - In the **Logistics** FactBox, you can see info on delivery times and nonworking days.
 - When selecting the **Show more** action on the **Options** FastTab, you can view and edit shipment details in the **Logistics** section.
 - With the **Apply Changes** action, you can inform your customer on the (intermediate) order total and transfer the lines to the sales order page. You will still be able to execute changes on the existing lines, they will be synchronized.

See also

[Sell Products](#)



Training

Article • 4/15/2025 • 1 min read

This selection of exercises will help you to get a better understanding of the Aptean Beverage Advanced Sales Management extension. The exercises can be performed in the [demo company](#) available in your database.

!

Note

Create a copy of this company to keep your demo company in the original state. In the copy you can do all the exercises that are included in the training.

To	See
Learn about Recurring Sales	Recurring sales exercises
Learn about Exclusivity	Exclusivity exercises
Learn about Sales Alerts	Sales alerts exercises
Learn about Calling List (Telesales)	Calling list (Telesales) exercises
Learn about Backorders	Backorders exercises
Learn about Indirect Sales	Indirect sales exercises



Recurring sales

Article • 7/6/2023 • 3 min read

This training is supposed to be given in a training session by a trainer. The trainer will use a PowerPoint presentation with an agenda that contains an introduction, the Apteau Beverage offering for the app, the goal of the training and links to this section of the online help document.

Advanced Sales Management Setup

You can specify general business rules for your company in the Advanced Sales Management Setup. Verify this setup by reading the tooltips for each field.

In the training, we keep this setup untouched. In customer projects, you can of course make other choices.

Recurring Sales

Customers in the beverage industry often order the same products, in a recurring pattern. This exercise is about product lists that will be used in the sales processes with customers.

In chapter **Calling list (Telesales)** we will see how a recurring frequency can be defined in setup by creating call schedules, in chapter **Exclusivity** we show how customers can even be limited in what they may order, by list can even and the product lists.

Our sales team signed an agreement with a new Customer, The Red Lion. We will deliver them what we usually do with our pubs, beers and soft drinks. Besides that, they also want to receive some of the bears and the wines that we import.

Note

Verify that your work date is set to 24th January 2022

Exercise 1 - New customer with recurring sales

1. Create the new customer with the template PUB.
2. Setup Recurring Sales lines on the Advanced Sales Management FastTab and make sure that they are automatically inserted on the Order Entry page:
 - BEER-PREM
 - SOFT



3. Verify this setup by making a sales order for the customer and open the Order Entry page (choose the action or use the shortcut Ctrl+Alt+N). The page should show these items:

No.	Name
1080	BEER CRONUS PREMIUM KEG 50L
1280	BEER CRONUS BLOND KEG 50L
1770	BEER DE WHEAT KEG 30L
1680	BEER DIT ALE CASK 30L
2010	WATER CRONUS STILL 6X50CL
2610	WATER SPRING STILL 12X50CL OW

Exercise 2 – Customer specific lists

1. Create a Customer Specific List for the Red Lion.
2. Fill the list with the use of the Item Categories for Purchased beer, Purchased wine and item 1310 BEER CRONUS ZERO CASE 24X25CL.
3. We agreed with the customer that we only deliver full pallets for the zero alcohol beer. Include that in the requirements in this list.
4. What the system will do when Order Multiples are enabled depends on the User Setup. Verify this for your user account.
5. Verify that the list is automatically inserted on the order entry page.

Exercise 3 – Add new items to existing lists

We launched a new product, BEER CRONUS EASTER WHITE CRATE 24X33CL 1. Create the Item with the use of Item Template 450 Finished products – beer 2. Update fields according to the description of the Item 3. Include the item in recurring sales lines: *Selangorian – May event* Merlin's Pub – Spring event *Beer On Premises* Beer - retail

1. Verify that the item is included in these lists in the Exclusivity FactBox on the Item Card



Exclusivity

Article • 12/12/2023 • 6 min read

All customers do not have access to every product we sell. For example, Cannon-beer is produced exclusively for the Cannon Group, a wholesaler, and is not available to other customers.

Consider,

- Item 1410 BEER DRINKS (CANNON) LABEL TRAY 6X33CL CAN is an exclusive item
- Item 1010 BEER CRONUS PREMIUM CRATE 24X33CL is a non-exclusive item

Customers can also be exclusive. For example, a customer may have a contract with a producer that restricts them from buying beers made by other producers. Similarly, an on-premises customer might be required to purchase beers in kegs rather than bottles.

Consider,

- Customer 40000 Deerfield Drinks is a discount retailer. The producers of imported beers have specifications that their products should not be sold through this sales channel.
- Customer 20000 Selangorian Pub is a normal customer and can sold all the assigned non-exclusive and exclusive items.

! Note

- Exclusive items can only be sold to customers who are allowed to buy it.
- Exclusive customers can only buy items that they are allowed to buy.
- Non-Exclusive items can be sold to any non-exclusive customer.

Exercise 1 – Sell to an exclusive customer

Our sales team signed an agreement with a new Customer, The Beer Merchants. We will only sell them the products from the Beer – retail list. They are not allowed to buy any other product. 1. Create a new customer with template CUST000001 Customer DOMESTIC Tax Paid. 2. Make the customer an Exclusivity Customer. 3. Add the Beer – retail list and make sure it is automatically inserted on the order entry page.. 4. Verify that the customer has 8 Allowed Items and 0 Allowed Exclusive Items. 5. Create a sales order for the customer. 6. Can you sell an item that is not allowed for the customer, for instance Item 1050? 7. Now, open the order entry page and try the same. What is the difference?



Exercise 2 - Sell an exclusive item

For the CANNON Group, we already produce their private label beer in 33CL cans. We will now also produce the same product in 50CL cans. 1. Create a new item BEER DRINKS (CANNON) LABEL TRAY 6X50CL CAN by copying item 1410. Select ITEM1 as Target No. Series. Adjust fields as necessary. 2. Verify: *The item is exclusive* The item is not included in any standard sales code. 3. Include the item in the customer specific recurring sales lines for The Cannon Drinks Group. 4. Create a sales order for customer 10000 and open the **Order Entry** page. 5. Do you see the new item in the product list? 6. When we have the customer on the phone, we want to take the quantities for this new product directly at the beginning of the call. Use the **Move Up** action to achieve this.

Exercise 3 – For a non-exclusive customer, restrict non-exclusive items and allow exclusive items

Our sales team signed an agreement with a new customer, *The Coffee Pub*. We sell all non-exclusive items except item 1010, and only item 1410 from the exclusive items for this customer.

1. Create a new customer with template, *CUST000001 Customer DOMESTIC Tax Paid*.
2. Make the customer an Exclusivity Customer.
3. Create a customer specific recurring sales code for the new customer (**Related > Sales > Recurring Sales Lines > Customer Specific Code**).
4. Create a line for item 1010 with exclusivity type *Exclude*.
5. Create a line for item 1410 with exclusivity type *Include*.
6. Verify the details of following fields on the customer page
 - Multiple Allowed Items, excluding item 1010
 - Allowed Exclusive Items, item 1410
 - Multiple Excluded Items, included item 1010
7. Create a sales order for the customer.

Can you sell item 1010?

Can you sell item 1510?

Can you sell item 1410?

Now, open the **Order Entry** page and try the same. What is the difference?

The considerations for the exclusivity functionality on or before version 2402.0.0.0 is as follows:

- Based on combination of exclusive items and recurring sales lines.



- Periodic activities necessary to update the allowed items with actual situation.
- For performance purposes, setup is possible in the **Disable Auto-Update Allowed Items** toggle on the **Advanced Sales Management Setup** page.
- From the customer page, exclusivity items can be updated.
- Differences may occur between exclusivity items and assigned recurring sales lines, specifically in terms of inclusivity and exclusivity types.

The key considerations for the exclusivity functionality after upgrading to version 2402.0.0.0 or later is as follows:

- Only based on recurring sales lines.
- No periodic activities are necessary to update the allowed items to reflect the status.
- No performance setup is necessary, the update reflects the status directly.
- Exclusivity items no longer exist as functionality.
- The allowed items, allowed exclusive items, and excluded items are directly visible on the **Recurring Sales Lines** list page, along with the recurring sales line code used to include or exclude each item.

Note

To activate this functionality, it is necessary to configure the necessary settings in the Aptean [Feature Control](#) extension.

During the activation of the new feature, the following conversion will take place.

- Exclusivity item setup is added to the customer-specific recurring sales line, and if it does not exist, it is created.
- The following conversions are done based on the exclusive items and the already assigned recurring sales line. The value of the exclusive item will have the highest priority.
 - Exclusive Customer
 - Included non-exclusive item, not already assigned
 - Included exclusive item, not already assigned
 - Excluded non-exclusive item, already assigned as included in assigned recurring sales lines
 - Excluded exclusive item, already assigned as included in assigned recurring sales lines
 - Non-exclusive Customer
 - Excluded non-exclusive item, not already assigned
 - Included exclusive item, not already assigned
 - Included non-exclusive item, what is excluded in an assigned recurring sales line
 - Excluded non-exclusive item, what is included in an assigned recurring sales line
 - Included exclusive item, what is excluded in an assigned recurring sales line



- Excluded exclusive item, what is included in an assigned recurring sales line

When activating the new feature, conflicts may arise between the current values of the exclusive items and the existing customer specific recurring sales line. In such scenarios, you will receive notification allowing you to navigate to the record. These must be resolved by updating the exclusive items or the recurring sales line to activate this feature.



Sales alerts

Article • 7/6/2023 • 3 min read

Sales Alerts

When you sell products to customers, you want to optimize your sales. Whether you sell from a web shop, or in a tele-sales call, you want to give service, and seduce your customers to purchase. The Aptean Beverage Advanced Sales Management includes tools that can be used for this purpose:

Sales Product Notifications

- **New product:** When you introduce a new product, you might want to notify your customers for that during a certain period.
- **Seasonal product:** if you have products that are only sold during a certain period (Christmas Beer), you might want to notify your customers for the product during that period.
- **Cross-sell product:** if product A (Gin) is often sold in combination with product B (Tonic), you can bring that to the attention of the customers,
- **Upsell product:** if you sell multiple comparable products (Pepsi Cola and Coca Cola), you might prefer one of them to sell to your customers. For instance, because your margin on Pepsi Cola is higher than Coca Cola). You might want to be able to ask customers that order Coca Cola to buy Pepsi Cola instead.

Sales Condition Notifications

In the Aptean Beverage Sales-Purchase conditions, you can setup discounts, charges and free products for customers. In the Aptean Beverage Sales-Purchase Condition Training, you learn how to set them up. On the Call Entry page in the Aptean Beverage Advanced Sales Management you can be notified for the conditions that are applicable for a customer, and for a customer/item combination. There is no additional setup is necessary for this.

Preparation for this exercise:

- *Change the Status of Sales and Purchase Condition Rules No. 46 and No. 65 to Certified.*

Exercise 1 - Create items with notifications

1. Create a **New** item and a **Seasonal** item during January 2022, both with the use of Item Template 450 Finished products – beer.
2. Notify your new item for **Cross-sell** opportunity with Item 5033 CRONUS beer glass 33CL (POS).
3. Notify your seasonal item for **Upsell** opportunity with Item 1010 BEER CRONUS PREMIUM CRATE 24X33CL.
4. Create a new sales order for the new customer The Red Lion. View New Items and Seasonal Items. Do you see your items?



5. Add both items with a quantity to the order.
6. Do you see the Sales Alerts for Cross-sell and upsell?
7. The lines that you created for the New and Seasonal item are in red color (Unfavorable). What does this mean?
8. What other colors are supported and what do they mean?
9. How many promotions are in place for this customer?
10. Calculate Condition Alerts for the page. For which Item is there a promotion available?



Calling list (Telesales)

Article • 7/6/2023 • 5 min read

Many companies in the beverage industry call their customers pro-actively to take their orders. This is done with a recurring pattern, like once per week, on the same day and time. In the Apteau Beverage Advanced Sales Management, you can create and maintain calling lists. Sales operators can do their job from that calling list.

Exercise 1- Setup a customer for a calling list

Our new customer The Red Lion wants to be delivered each week on Wednesday. Our TEAM1 will call them on Tuesday 10:00 AM to take the order. Our first call will be on January 25th 2022. We should call the customer before 11:00 AM. 1. Create the Call Schedule and the Call Entries until the end of the year with the use of the action on the Customer Card. 2. Verify the entries. Check your filters if the result is not as expected. 3. Make yourself a member of the Call Entry Group TEAM1.

Exercise 2 - Execute the call with the customer

Today it is Tuesday January 25th 2022. Reopen your Business Central client with that date.

1. Open the list with call entries. Show the system filters that explain which entries are now visible for you. Why does the system set these filters?

Yesterday's call entries are still open. We are going to make the call with the Selangorian Pub.

2. Open the Order Entry page from that entry. **Is the message that pops-up clear to you?** Continue by creating a new order.

3. There is a notification on the order entry page. Our sales rep promises free glasses and t-shirt during his last visit. **Add them to the order.**

4. Lines for the POS materials are added in green. This means that we have enough of them in stock. **Where can you see the availability of these items?**

5. In the beginning of the call, we Inform the customer about our new and seasonable items. He is interested in your seasonable item and orders 10 of them. **Register this in the Quick Entry FastTab. Do this with the "Search As You Type" selected and unselected.** Our assumption is that users will set this field according to their own preferences.

6. The customer is ordering while he is in his storage. He always starts his order with the beers. The recurring sales line BEER-PREM is automatically inserted. **What happens if you register more than the Item Availability for an item? And what when you register a quantity on the EASTER WHITE beer that we created in the recurring sales exercise?**

7. Next, the customer will order his soft drinks and waters. **Get that list in the entry.**



8. We can make our live easier by setting the filter for this list in the Recurring Sales Code field in the Options FastTab. **Set this filter and register some quantities.**
9. The Selangorian Pub also has a specific list that includes products that we don't sell by standard to pubs. **Get that list in the entry and filter on it.**
10. In a customer specific list, we can arrange the sorting of the items while we are on the phone with the customer. **Try out the Move Up and Move Down actions.**
11. The pub owner wants to know the order totals for this order. **Apply your changes and use the FactBox to inform him.**
12. Add a line for Item 1000 BEER CRONUS PREMIUM BOTTLE 33CL with 1.000 Quantity:
- A message will pop-up with the question: *Do you want to add this item to a recurring sales code?* You can answer the question to your choice. The reason for this question is coming from setup on the customer card. **Which field is that?**
 - There is not enough inventory for this item, but there is a substitutions available. A message will pop-up with the question: *Do you want to use the substitute for the missing inventory?* **Try out both answers and then explain the result in the order.**
13. In the **Sales History** FactBox, you can see the quantities sold in 4 periods for the item in the selected line:
- **Why is this important information for the sales operator?**
 - **You can change the length of the periods. Try this out.**
14. Include all recurring sales lines for the Selangorian Pub in the order entry page. The list of items is now a long list. In some projects, the list of products is even much longer. Still, you are able to find for instance all "water" items in the list. **How would you do this?**
15. The customer that you are calling might request to receive the goods on another day. You can do this in the Shipment Date field.
16. When you finished the order registration, you can close the page and apply the changes. What you registered in the order entry page was registered in a temporary table. By applying changes, all changes are synced to the sales order.
17. The call entry where you started from is now closed and not visible on the list anymore. By changing filters on the page, you can make it visible again.
- **Verify the call entry where you started from.**
 - **Can you find the sales order from the entry?**
 - **Can you explain why the Status is ORDER?**



Backorder

Article • 7/6/2023 • 4 min read

Companies in the beverage industry do the 'customer service' on backorders mostly before the shipment. After picking, it is clear that some quantities were not available. Salespeople can call customers from the Backorder Lines function and decide with the customer further actions (deliver, postpone, backorder, no backorder). In Advanced Sales Management, it is possible to do so based on the Qty to ship from the sales order line or the warehouse shipment line.

Exercise 1 – Setup backorder policies

In the Aptean Beverage [Foundation Management](#), you can specify default reason codes for your sales and purchase transactions. When orders are created, the header and lines will get the default for the order.

A company backorder policy can also be setup by reason codes:

- When your company has a default backorder policy, you can define that policy in the default sales order reason code. The options are:
 - **Backorder in Order:** The sales order line with an unavailable quantity stays open for further action. This is the "Standard" Business Central behaviour.
 - **No Backorder:** The sales order line with an unavailable quantity will be closed, quantity updated, and original quantity saved.
 - **Backorder in Blanket Order:** The sales order line with an unavailable quantity will be closed, quantity updated, original quantity saved, and the unavailable quantity will be copied to a new blanket order line.
- Verify the setup on the reason codes in the DEMO Company. **What is the default policy for sales in our DEMO company?**

Exercise 2 – Order entry and backorders without warehouse activities

We are going to call our new customer, The Red Lion for their first order. 1. Open the Order Entry page from today's call entry 2. They order 50 boxes of item 3600 WINE FRANCE SPARKLING LIGHT 75CL. In the FactBox, we already see that we only have 45 available. We will not keep the missing quantity in backorder. Since this is our standard company policy, we don't have to do anything. 3. Next, they order 100 of item 1310 BEER CRONUS ZERO CASE 24X25CL. Also, more than we can ship, but we expect to receive new inventory. So, we select BACKORDER in the reason code field. 4. Close the order entry and apply changes. 5. In the sales order lines register the item availability in the Qty. to Ship field and release the order for further processing. 6. Open the Backorder Sales Lines page and filter on lines for The Red Lion. 7. Select the lines and execute the Process Backorder action. 8. Verify: *The lines in the sales order. What has changed?* Can you find the Blanket Sales Order that was created? * Create a new sales order for this customer and open the order entry page. Are you notified for blanket order lines are due? You can ask the customer if he still wants them and add them to the order as necessary.

Exercise 3 – Process backorders with warehouse activities

Let's now create a similar order as in the previous exercise again, but now we will ship it from the SILVER warehouse.

1. Create the order for The Red Lion, select the SILVER location in the header and enter the 50 boxes of wine (3600) and 10 crates of beer (1010). 2. There is no inventory for the wine. The customer wants you to take it in backorder. Select the BACKORDER reason code in that sales line. 3. As sales order operator, your job for this order is finished now. The warehouse employees will organize the picking and shipping activities. 4. Create a warehouse shipment and warehouse picks for this order 5. Register the pick lines 6. Open the Backorder Sales Lines page and filter on lines for The Red Lion. 7. Verify the Outstanding Quantity and the Whse. Qty. to Ship fields in the lines. 8. Select the lines and process the backorders 9. Verify: *The lines in the sales order. What is changed?* Can you find the Blanket Sales Order that was created? * Create a new sales order for this customer and open the order entry page. Are you notified for blanket order lines are due? You can ask the customer if he still wants them and add them to the order as necessary.

Note

Unavailable quantities may also appear only after registering warehouse picks. You may set the backorder type to 'no backorder' or 'backorder via blanket order' on the default reason code for sales orders.



Indirect sales

Article • 7/6/2023 • 2 min read

In the beverage industry, it is common practice to register indirect sales. What we mean with indirect sales, can be explained by this user story: We have customers who get delivered by us, and we have customers who get delivered (and invoiced) by distributors (direct customers of us). We call them outlets. Nevertheless, we consider these outlets as 'our' customers, our salespersons visit them regularly, we support them (facilitating loan in use items, investments), promise them free POS items, and even give year-end bonuses.

Exercise 1 – Direct and Indirect Customers

The Cannon Drinks Group PLC (10000) is a direct customer. We ship the goods they order to them. Great Frederick's Restaurant (ind.) (91000) is an indirect customer. They are delivered by The Cannon Drinks Group PLC. 1. Verify the setup for this on both customer cards. 2. Verify the fields on the Customer Relations page. Are they all clear to you? We agreed with Cannon Group that they will provide us the sales volumes to the restaurant. You can see this in the Customer Relations page. The Cannon Group is also started to deliver the CRONUS PREMIUM and CRONUS BLONDE beers in kegs to The Old Crown, a pub. They started in the beginning of this month and will provide us the indirect sales volumes quarterly. 3. Register the pub as an indirect customer with the use of the PUB template and create the customer relation between The Cannon Drinks Group and The Old Crown.

Exercise 2 – Register Indirect Sales

We received the sales info from The Cannon Drinks Group. They sold 20 premium kegs and 5 kegs of our blond beer to The Old Crown. 1. Register the sales volume for this customer in the indirect sales journal. 2. In the journal, you can see that there already are lines for Merlin's Pub, another indirect customer for The Cannon Drinks Group. These lines contain "Condition Amounts". *What do these amounts represent?* These amounts are shown in this Drink-IT Advanced Sales Management App, but the data is coming from another Drink-IT App. Which one? 3. Post the journal. *What did this posting action create? Why is this useful?* * What could be a next step for the registrations that were done for Merlin's Pub?



Business Process Walkthroughs

Article • 7/6/2023 • 2 min read

This selection of walkthroughs provides step-by-step, end-to-end business processes that you can perform using the [CRONUS DIT DEMO](#) demonstration company.

 **Note**

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the walkthroughs.

 **Note**

The Aptean Beverage is available in multiple countries. For each country, a dedicated demo company is available. This country specific company contains setup that is specific for that country (VAT, excise, language, etc.). They are all based on the Business Central CRONUS company for that country. For that reason, names and codes in your demo company can differ from the ones used in the walkthroughs. Since the Aptean Beverage setup is the same for all the countries, the walkthroughs can be used in every country. In the country specific deviations, you can verify these deviations.

To	See
Increase the benefits of the entry page by using recurring sales lines	Walkthrough: Use recurring sales lines in fast order entry
Increase the benefits of the entry page by using blanket orders	Walkthrough: Use blanket orders in fast order entry
Learn how to manage call schedules	Walkthrough: Create and maintain call schedule lines
Learn how to work with the call entry list	Walkthrough: Executing a tele sales call
Setup payment specification	Walkthrough: Payment Specification



Walkthrough: Use recurring sales lines in fast order entry

Article • 7/6/2023 • 5 min read

In the beverage industry, customers often order the same products with every new order. By creating recurring sales lines with these products, you can increase the efficiency of your order intake:

- **Manual:** the user executes the **Get Recurring Sales Lines** action.
- **Automatic** recurring sales lines are automatically added when a new document is created for the customer.
- **Always Ask** the user is made aware of existing recurring sales lines and has the choice to execute the **Get Recurring Sales Lines** action.

This function is also available on the **Fast Order Entry Page**. Here are some tips and tricks to get full benefit of the combination of the two.

Create multiple Recurring Sales Lines

The company in this walkthrough sells multiple types of beverages: own produced beers, but also beers, soft drinks, wines and spirits that are purchased from third parties. The customers that they sell it to, can in general be divided in two channels, the catering industry (hotels, bars, restaurants) and retail (supermarkets).

These recurring sales lines are created:

- **BEER-PREM:** this list contains own produced beers in KEG and the purchased beers (KEG or CASE).
- **BEER-RET:** this list contains own produced and purchased beers in CASE.
- **SOFT:** this list contains soft drinks and waters in PACK or CASE.
- **WINE:** this list contains wines in BOTTLE.
- **SPIRITS:** this list contains strong alcoholic drinks in BOTTLE.

Our sales department signed a contract with a new pub, the Red Lion. They will serve our beers from the draft

First, we will create a list that contains beer in kegs:

1. Select the Search icon , enter **Recurring Sales Lines**, and then choose the related link.
2. Choose the **New** action.
3. Enter **BEER-KEG** in the *Code* field and **Beers in Keg** in the Description.
4. On the **Lines** FastTab, select the **Items**:
5. 1080
6. 1280



7. 1770

Next, we create the new customer: 1. Select the Search icon , enter **Customers**, and then choose the related link. 2. Choose the **New** action. 3. Enter **63000** in the No. field and **Red Lion** in the *Name*. 4. Choose the Apply Template action. 5. Select the template for **Customer DOMESTIC** and choose **OK** and confirm the message.

You can fill in other fields on the customer card but for this exercise it is only necessary to connect the recurring sales lines to the customer: 1. Choose the **Setup recurring sales lines** action on the **Advanced Sales Management** FastTab. 2. On the **Recurring Sales Lines** page, select BEER-KEG in the **Code** field and close the page.



Walkthrough: Use blanket orders in fast order entry

Article • 7/6/2023 • 4 min read

Blanket Orders can be a useful document in beverage sales processes. For instance to register free items that are promised by a sales rep, or pre-register the sales of seasonal products, like a Christmas beer.

On the Order Entry page, you will be prompted for existing blanket order lines if a blanket order exists for a customer. With an action, you can add lines from that blanket order to your order:

1. Select the Search icon , enter **Blanket Sales Orders**, and then choose the related link.
2. Choose the **New** action.
3. Fill in the fields as necessary. Hover over a field to read a short description.
4. On the **Lines** FastTab, create separate lines for the free items, the seasonal products, or else.

To add blanket order lines to the order entry pages

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
2. Choose the **New** action and create an order for the customer that you created the blanket order for.
3. Choose the **Order Entry** (Ctrl+Alt+N) to open the order entry page
4. There is a notification for the existing blanket order lines. Choose the **Get Blanket Order Lines** action.
5. Select the lines that you want to add to the order.



Walkthrough: Create and maintain call schedule lines

Article • 7/6/2023 • 1 min read

This part is currently under construction and will be updated in a future release of the extension.



Walkthrough: Executing a tele sales call

Article • 7/6/2023 • 2 min read

The Customer 20000 is a pub. Each Monday, the Call Entry Group TEAM1 calls the customer to take the order for the shipments on Tuesday. The KEG beers are the main products that they buy, so this list is automatically inserted on the Order Entry page. Besides this beer, they also can order soft drinks and waters. This is a manual list.

1. Set your **work date** to January 24th 2022.
2. Make yourself member of **Call Entry Group** TEAM1.
3. Search for **Call Entries** (optional, bookmark this page).
4. Select the entry for customer 20000 and choose the **Create Order** action.
5. If a popup is shown with an existing order alert, choose **Create new order**.
6. In the new sales order, choose the **Order Entry** action (Ctrl+Alt+N) to open the order entry page. Hover over a field to read a short description.
The lines for the beers are already available in the lines. The Sales Operator only needs to key in Quantity.
The sales rep promised the customer free glasses and t-shirts. A blanket order was created for this purpose.

7. Choose the **Get Blanket Order Lines** action.
8. Select the lines that you want to add to the order.
9. Key in some quantities in the lines. Notice the colors that indicate the item availability:
 - Favorable (Bold + Green): the *full quantity* is available.
 - Ambiguous (Yellow): the quantity is *partially* available.
 - Unfavorable (Bold + Italic + Red): there is *nothing* available.

10. Execute the **Apply Changes** action.
 - The order totals are calculated and visible in the **Order Details** FactBox.
You can use this function for instance when the customer wants to know the intermediate total.

Now that the beer list is finished, we can continue with the soft drinks and water.

11. Execute the **Get Recurring Sales Lines** action, select SOFT and press OK.
 - New lines are added. You can filter them out by setting the *Recurring Sales Code Filter*.
 - Enter quantities and continue the process as before.
12. Your call is finished. Close the order entry page and apply your changes. Release the order and it is ready for shipment.
13. Close the order and notice that the call entry is not open anymore. It is closed with the **Close Call Status** from the Advanced Sales Management Setup.



Walkthrough: Payment Specification

Article • 4/2/2024 • 11 min read

The Payment Specification (Invoice list) is an overview document that displays the details and information for making payments. It consolidates the information from the open posted sales invoices and credit memos ledger entries. It serves as a guide for the Payment-from Customer, providing information such as invoice numbers, amounts, payment discount, due dates, and more related information for transaction. This enables you to consolidate and process the payments efficiently.

In our example, we set up customer **50000, Guildford Wholesalers**, as the Payment-from Customer for Customer **60000, Blanemark Drinks Discounter**, who serves as the Sell-to Customer. We then create a payment specification and process that payment specification.

Setup customer as payment-from customer

1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. In the **No.** field, select **50000**.
The **Customer Card** page opens.
3. On the **Advanced Sales Management** FastTab, in the **Payment Specification** section, turn on the **Payment Customer** toggle. This sets the customer 60000 as Payment-from Customer who will pay for invoices of Bill-to customer.
The Balance (LCY) as Payment-from Customer is visible.

Assign customer to payment-from customer

1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. In the **No.** field, select **60000**.
The **Customer Card** page opens.
3. On the **Advanced Sales Management** FastTab, in the **Payment Specification** section, in the **Payment-from Customer No.** field, select **50000**.
Conformation dialog is shown that existing open entries can be updated so they also assigned to the payment-from customer.
4. Press **No**.



 Note

The **Payment Terms Code** and **Payment Method Code** fields on the **Payments** FastTab are inherited based on the selected customer and are not editable when the **Payment-from Customer No.** field has value. When you change these fields on the payment-from customer all related customers are also updated.

Post Sales Order for Invoicing for customer with payment-from customer

1. Select the Search icon , enter **Sales Orders** and then choose the related link.
The **Sales Orders** list page opens.
2. On the action bar, select **New**.
The **Sales Order** card page opens.
3. On the **Customer Name** field, select *60000*.
4. On the **Advanced Sales Management** FastTab, the **Payment-from Customer** is *50000*.
5. On the **Posting Date** field, enter the actual date.
6. Create a **Sales Line** for **Item 1010** with **Quantity 10** and **Unit Price 12.50**.
7. On the action bar, select **Release**.
8. On the action bar, select **Post > Ship and Invoice**.
The Posted Sales Invoice is created.
9. Open the created Posted Sales Invoice from the shown dialog.
10. On the action bar, select **Find Entries**.
11. Select the line for **Cust. Ledger Entry**.
12. On the action bar, select **Show Related Entries**.
The field **Payment-from Customer** is *50000*. When tax and deposits are related to the posted sales invoice the amounts for tax and deposit are also updated.

Create Payment Specification

1. Select the Search icon , enter **Payment Specifications**, and then choose the related link.
The **Payment Specifications** list page opens.
2. On the action bar, select **Create Payment Specifications**.
The **Create Payment Specification** page opens.
3. In the **From Date** field, enter a value.
4. In the **Till Date** field, enter an actual date.



5. In the **Payment-from Customer No.** field, select *50000*.

6. Select **OK**.

The Payment Specification is created for the Payment-from Customer No., *50000*.

Note

You can manage your payment specification by changing the status and delete a complete payment specification or specific lines. When deleting a specific line, this line can be used to create a new payment specification.

View the customer balance for payment-from customer

1. Select the Search icon , enter **Customers**, and then choose the related link.

The **Customers** list page opens.

2. In the **No.** field, select *50000*.

The **Customer Card** page opens.

3. In the **Balance (LCY) as Payment Customer** field, select the value.

The **Customer Ledger Entries** page opens.

Print Payment specification

1. Select the Search icon , enter **Customers**, and then choose the related link.

The **Customers** list page opens.

2. Select the No. created for the Payment-from Customer No., *50000*.

The **Payment Specification Card** page opens.

3. On the action bar, select **Print**.

4. Confirm the shown dialog with **Preview**.

The preview of the Payment Specification is shown.

Variant Code on Order Entry page

On the **Advanced Sales Management Setup** page, you can specify if the Variant Code should be populated in the **Quick Entry** section on the **Order Entry** page, by turning on the **Show Variant Code** toggle. If the toggle is turned off, the Variant Code is not visible in the **Quick Entry** section.

Additionally, functionality has been added to automatically populate the **Sales Default** variant code when validating the **Item No.** in the Quick Entry or the Order Entry Lines. This integration extends to the following actions when the variant code is empty in the original record.

