

User Manual

Aptean Food and Beverage ERP

Call Plan

Product Documentation



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Release notes

Article • 5/27/2026 • 1 min read

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

Date	Release version	Description
May 2026	2503.3.0.0	Minor release
February 2026	2503.2.0.0	Stability release
November 2025	2503.1.0.0	Stability release
October 2025	2503.0.0.0	Feature release
July 2025	2502.0.0.0	Feature release
May 2025	2501.1.0.0	Stability release
February 2025	2501.0.0.0	Feature release
September 2024	2402.1.0.0	Stability release
July 2024	2402.0.0.0	Feature release
April 2024	2401.0.0.0	Feature release
January 2024	1.4.139156.0	Stability release
May 2023	1.3.97290.0	Stability release
March 2023	1.2.83606.0	Stability release
February 2023	1.1.78118.0	Stability release
August 2022	1.0.55969.0	Initial release



2503.3.0.0

Release Note • 5/27/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean Call Plan extension,

- The *OnBeforeOpenNewPurchaseOrder* integration event has been added to the *PurchaseDocMgmt59FDW* codeunit. This event allows partners to add custom logic before opening a new purchase order from a vendor call plan worksheet entry. It also includes an **IsHandled** parameter, which enables skipping the standard process when required.
- The global variables on the *GenerateVendorCAPLines59FDW* (Report 70241758) report have been exposed as protected variables to enable partners to access and extend the functionality through report extensions. This allows customization of request page options such as *GlobalWorksheetName*, *GlobalCallDate*, *GlobalDayOfTheWeek*, *GlobalClearExistingLines*, and *GlobalIgnoreLastUsedCallPlanDate*.
- The *OnBeforeOpenNewPurchaseOrder* event has been exposed as an *IntegrationEvent(false, false)*, and a new public codeunit *PurchaseDocMgmt59FDW.Codeunit.al* has been added to enable partners to access and extend the same functionality using the same parameters.

Resolved issues

The following issue has been resolved in this release.

ID	Description
343078	The system fails to update the Call Plan Date field value on the sales order when executing the Convert Standing Order action from the Call Plan Worksheet page, which causes cut-off time restrictions to not be enforced on the resulting sales order. Additionally, the system displays an incorrect tooltip for the Include for Cut-Off Time Restriction field on the Sales Call Plan Setup , Responsibility Center Sales Call Plan Setup , Customer Call Plan Setup , and Sales Order pages, where it references the shipment date instead of the call date.



2503.2.0.0

Release Note • 2/4/2026 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean E-Commerce extension. For more information, see [What's new in E-Commerce, version 2601.1.0.0](#).



2503.1.0.0

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

Enhancements/Modifications

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



2503.0.0.0

Release Note • 10/22/2025 • 4 min read

Features

With the features added in this release of the Aptean Call Plan extension, you can:

- Configure the **Sales Call Plan Setup** page to define and manage recurring order templates called standing orders using centralized configuration settings. For more information, see [Create standing orders](#).
- Access and view standing orders from the **Customer Card** and **Ship-to Address Card** pages, with automatic filtering based on context. For more information, see [Sales call plan worksheet](#).
- Enter and validate standing order lines with day-of-week quantity specifications, ensuring no duplicate lines exist for the same item, variant, and unit of measure combination. For more information, see [Create standing orders](#).
- Manage standing order detail entries that store quantity data by day of the week for conversion to sales orders and demand analysis. For more information, see [Manage standing order detail entries](#).
- Create and manage standing order templates to set up recurring customer orders with predefined items, quantities, and delivery schedules using the **Standing Order Card** page with quantity entry. For more information, see [Create standing orders](#).
- Manage standing order lifecycle with status tracking (Draft, Active, Inactive) and view the most recent conversion date to monitor standing order usage. For more information, see [Manage standing order detail entries](#).
- Track standing orders throughout the sales process using the **Standing Order No.** field, in sales orders, posted sales shipments, and posted sales invoices. For more information, see [Sales call plan setup](#).
- View additional information, such as customer, ship-to, and conversion details on the FactBox of the **Standing Order card page**. For more information, see [View additional details on the FactBox](#).
- Copy standing orders to create new templates or update existing ones from other standing orders by executing the **Copy Standing Order** action. For more information, see [Copy standing orders](#).
- Convert standing orders to sales orders automatically through scheduled reports that create sales documents based on configured date ranges and conversion methods. For more information, see [Schedule automatic conversion via job queue](#).
- Review standing order conversion errors with detailed error logging including item details, quantities, and Business Central error messages. For more information, see [Review of conversion errors](#).
- Manage and analyze standing order conversion errors with bulk status updates, filtering, sorting, and navigation to related standing orders for corrections. For more information, see [Review of conversion errors](#).



- View and manage standing order information directly in the sales call plan worksheet, including standing order numbers, conversion status, and error counts. The worksheet automatically matches standing orders based on customer, ship-to code, and worksheet date, allowing you to convert standing orders to sales orders directly from the worksheet. For more information, see [Create a new sales order](#).
- Configure a dedicated number series for sales orders created from standing order conversions using the **Converted Sales Order Nos.** field on the **Sales Call Plan Setup** page. When this field is blank, the system uses the default number series defined on the **Sales & Receivables Setup** page. For more information, see [Set up call plan for sales](#).

UI/UX changes

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

- The following pages have been added.
 - Standing Sales Orders
 - Standing Sales Order
 - Standing Order Conversion Error Log Entries
 - Convert Standing Sales Orders
 - Standing Order Detail Entry
- The following actions have been added to the **Customers** and **Customer Card** page.
 - Standing Sales Order
 - Standing Sales Orders
- The **Standing Sales Orders** action has been added to the **Ship-to Address List** and **Ship-to Address** pages.
- The **Convert Standing Order** action has been added to the **Sales Call Plan Worksheet** page.
- The **Standing Orders** FastTab has been added to the **Sales Call Plan Setup** page.
- The following fields have been added to the **Sales Call Plan Worksheet** page.
 - Standing Order No.
 - Standing Order Converted
 - Standing Order Conversion Errors
- The **Worksheet Name** field has been obsoleted on the **Sales Call Plan Worksheet** page.



2502.0.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Call Plan extension, you can enforce sales order cut-off dates and times on the e-commerce platform. To know more, see [Highlights of E-Commerce, version 2501.0.0.0](#).

Integrations

The Aptean Call Plan extension has been integrated with the Aptean [E-Commerce](#) extension. For more information, see [Integrations](#).

UI/UX changes

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

- The **Cut-off restrictions apply to E-Commerce** toggle has been added to the **General** FastTab of the **Sales Call Plan Setup** page.
- The **Timezone** field has been added to the **Order Entry Cut-off Times** FastTab of the **Sales Call Plan Setup** page.

Note

This toggle is visible only when the Aptean [E-Commerce](#) extension is installed.



2501.1.0.0

Release Note • 5/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Call Plan extension,

- The translation file for the Chinese (zh-CN) language has been added.
- The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.



2501.0.0.0

Release Note • 2/25/2025 • 1 min read

Features

With this release of the Aptean Call Plan extension, you can define the **Inside Salesperson Code** field value, on the **General** FastTab of the following pages.

- Sales Quote
- Sales Return Order
- Blanket Sales Order

UI/UX changes

The **Inside Salesperson Code** field has been made visible on the **General** FastTab on the **Sales Quote**, **Sales Return Order**, and **Blanket Sales Order** pages.



2402.0.0.0

Release Note • 7/24/2024 • 4 min read

Features

With the features added in this release of the Aptean Call Plan extension, you can:

- Streamline purchase call plans by setting default call days and specifying the source for the inside purchaser.
- Organize the vendor contact information and schedule vendor calls for receipt activities.
- Enable cut-off restrictions for specific vendors or order addresses, ensuring non-editable purchase lines after a designated cut-off time.
- Set cut-off warning minutes to trigger visual alerts, indicating when purchase lines may become non-editable.
- Define the source for inside purchaser codes when a sales order is created from a call plan worksheet. The inside salesperson code on the order will be inherited from the selected source.
- Set default call days to determine the specific days to contact vendors for particular receipt days.
- Specify order entry cut-off times to ensure that purchase lines become non-editable after the designated times on scheduled call days.
- View or create call plan worksheets to manage vendor contact schedules, enhancing communication and coordination.

For more information, see [Set up call plan for purchase](#).

- Configure call plan structures directly from the **Vendor Card** or **Order Address** page.
- Include vendors in call plans using the **Include in Call Plan** toggle for streamlined vendor management.
- Set contact information for vendors to facilitate communication regarding call plans.
- Define call and receipt days to specify when vendors should be contacted for purchase orders. Additionally, you can set call windows by defining start and end times for contacting vendors on scheduled call days.
- Determine call plan frequency to ensure regular communication with vendors (weekly, bi-weekly, every three or four weeks).
- Track the last creation dates for call plan records to maintain up-to-date vendor interactions.

For more information, see [Set up call plan structure for vendor](#).

- Generate personalized worksheets for vendors and order address contacts based on designated weekdays.
- Define receipt dates and days for requested and expected availability in the warehouse.
- View and manage multiple orders for the same vendor or address on a specific call date.
- Identify blocked transactions involving vendors with operational issues.
- View vendor and address details for accurate contact information and order management.



Call Plan

- Generate call plan lines using specific call dates and vendor filters.
- Create new purchase orders directly from call plan lines, inheriting key field values.
- Send emails directly from the worksheet to streamline communication with necessary contacts.

For more information, see [Purchase call plan worksheet](#).

- Generate call plan lines by selecting specific call dates and applying vendor filters, creating tailored entries for vendor contact schedules.
- Customize worksheet generation options by using the **Clear Existing Lines** and **Ignore Last Used Call Plan Date** toggles, ensuring accurate and relevant call plan entries.
- Move call plan lines from one worksheet to another, streamlining the organization of vendor contact schedules.

For more information, see [Generate call plan lines on the worksheet](#).

- Create personalized call plans for vendors or order addresses using responsibility centers.
- Generate call plan lines specifically for vendors based on their associated responsibility center, providing targeted call plan setups.

For more information, see [Set up call plans with responsibility centers](#).

UI/UX changes

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

- The **Purchase Call Plan Setup** page is added.
- The **Purchase Call Plan Worksheet** page is added.
- The **Vendor Call Plan Setup** page is added for the corresponding vendor.
- The **Call Plan Setup** page name is renamed to **Sales Call Plan Setup**.
- The **Call Plan Setup** page name for the respective customer is renamed to **Customer Call Plan Setup**.
- The **Call Plan Worksheet** page name is renamed to **Sales Call Plan Worksheet**.
- The **Sales Call Plan Setup** and **Purchase Call Plan Setup** actions are added to the **Responsibility Centers** and **Responsibility Center Card** pages.
- The **Include for Cut-off Time Restriction** toggle is added to the **General** FastTab of the **Purchase Order** page.
- The **Inside Purchaser Code** field is added to the **General** FastTab of the following pages:
 - **Vendor Card**
 - **Posted Purchase Receipt**
 - **Posted Purchase Invoice**
 - **Posted Purchase Archive**



2401.0.0.0

Release Note • 4/17/2024 • 1 min read

Features

With the features added in this release of the Aptean Call Plan extension, you can:

- Use the **Last Used Call Plan Date Updates From** field to determine the criteria for updating the **Last Used Call Plan Date** field on the **Call Plan Setup** page of a Customer. To know more, see [Call Plan Setup](#).
- View the most recent date on which the Call Plan was generated in the **Last Used Call Plan Date** field.
- Use the **Ignore Last Used Call Date** toggle on the **Generate Call Plan Lines** report page to generate the call plan lines without considering the last used call plan date. To know more, see [Generate new records in Call Plan Worksheet](#).

UI/UX changes

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

- The **Last Used Call Plan Date Updates From** field is added to the **Call Plan Setup** page.
- The **Last Used Call Plan Date** field is added to the **Call Plan Setup** page of a Customer.
- The **Ignore Last Used Call Date** toggle is added to the **Generate Call Plan Lines** report page.



1.4.139156.0

Release Note • 1/24/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
164441	The Shipment Date value is not calculated correctly based on the Shipment Day on the Call Plan Worksheet page.



1.3.97290.0

Release Note • 5/9/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
116364	An error occurs while creating a sales document from the Call Plan Worksheet if recurrent sales lines exist with automatic insertion.



1.2.83606.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

In order to add the integration events requested by the partner, the Extensible condition on the Generate Call Plan Lines report has been changed from false to true. The integration events have also been added.



1.1.78118.0

Release Note • 4/3/2023 • 1 min read

Enhancements/Modifications

The Aptean Call Plan extension is now updated with minimal API to improve extensibility. The extensibility property applies to tables, pages, and other object types of this extension.

Note

Minimal APIs are a simplified approach for building fast HTTP APIs with ASP.NET Core. For more information, see [Minimal APIs overview](#) | [Microsoft Learn](#).



1.0.55969.0

Release Note • 4/3/2023 • 2 min read

Features

The Aptean **Call Plan** extension helps you to manage your shipment activities. You can now perform the following activities with the features included in this release:

- Organize the customer contact information and schedule customer calls for shipment activities. For more details, see [Set up call plan for sales](#).
- View the list of Customer/Ship-to Addresses to be contacted by the sales department on a specific day of the week regarding sales and shipment activities. For more details, see [Sales call plan worksheet](#).
- Configure how and when the Customer/Ship-to Addresses is included in the Call Plan Worksheet. For more details, see [Set up call plan structure for customer](#).
- Change the Inside Salesperson Code on the Sales Order to specify the user responsible for calling the customer, and accepting and entering their sales orders. For more details, see [Inside Salesperson Code](#).
- View the Inside Salesperson Code on the Posted Sales Shipment, Posted Sales Invoice, and Archived Sales Order.
- Control the cut-off time restriction through the **Include for Cut-off Time Restriction** field on the sales order. It prevents the addition, modification, or deletion of sales line with respect to cut-off time restrictions. For more details, see [Cut-off Time Restriction](#).
- Specify the call day(s) on which the customer(s) have to be contacted for the specific shipment day through the **Default Call Days** field on the **Call Plan Setup** page.
- Specify the time on a specific shipment day after which the sales lines may no longer be editable in the sales documents through the **Cut-Off Time** field.
- Display a warning that the cut-off time is approaching through the **Cut-Off Warning Minutes** field.
- Call the Customer/Ship-to Addresses on a weekly or biweekly basis. For more details, see [Call Plan Frequency](#).
- Trigger the external (phone) software by selecting the required customer Phone No. on the Call Plan Worksheet.
- Send e-mails from the Call Plan Worksheet entries.
- Display the date on which the Call Plan record was created through the **Last Creation Date** field on the Call Plan Structure for Customer/Ship-to Addresses. For more details, see [Last Creation Date](#).
- Set up a call plan specifically for a Customer/Ship-to Addresses through the **Responsibility Centres** page. For more details, see [Set up sales call plans with responsibility centers](#).



Introduction

Article • 4/3/2023 • 1 min read

The Apteian Call Plan (CAP) extension is designed to streamline and optimize the sales and purchase processes within an organization. This extension effectively manages the shipments and receipts, enabling you to schedule customer and vendor interactions, as well as coordinate shipping, receiving, and delivery timelines.

Additionally, it incorporates pertinent information for each customer and vendor in the sales and purchase pipeline. With the Apteian Call Plan extension, a structured call plan can be established, empowering sales and purchase users to efficiently engage with the list of customers and vendors associated with each order.

By using the call plan worksheet, sales and purchase personnel can easily create new orders and access existing ones that are associated with the call plan record. The Apteian Call Plan extension helps in planning, monitoring, and integrating sales, shipment, purchase, and receipt processes, making it a valuable tool for improving operational efficiency.



General setup

Article • 12/27/2024 • 1 min read

The following setup is required.

- [Manage permission sets](#)



Manage permission sets

Article • 12/27/2024 • 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 *CALLPLAN59FDW*.

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 *CALLPLANBASIC59FDW*.

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 Apteian Call Plan extension, ensuring secure and role-based access.



Set up call plan for sales

Article • 10/22/2025 • 6 min read

You can configure call plan behaviors using the **Sales Call Plan Setup** page. The values for the sales call plan setup, such as shipment date, route code, shipping agent service code, and more, are displayed on the **Sales Order** page. The following steps guides how to set up the call plan.



1. Select the Search icon , enter **Sales Call Plan Setup**, and then choose the related link.

The **Sales Call Plan Setup** page opens.

2. On the **General** FastTab, use **Enable Cut-off Restrictions** toggle to enable/disable cut-off time restrictions. It restricts the entry of sales lines if the system time is past the cut-off day and time.
3. Turn on the **Cut-off restrictions apply to E-Commerce** toggle to enable alerts for e-commerce for cut-off restrictions.

Note

This toggle is visible only when the Aptean [E-Commerce](#) extension is installed.

4. In the **Cut-off Warning Minutes** field, enter the number of minutes in advance to each day's cut-off time, by which a warning will be displayed that the cut-off time is approaching.
5. In the **Source for Inside Salesperson Code** field, select the required option to specify the value for the inside salesperson code in a sales document. The options include:
 - **Call plan:** The **Inside Salesperson Code** field value on the **Sales Order** page is updated as follows:
 - If the sales order is created from the **Sales Call Plan Worksheet** page, the value is updated with the associated field value on the **Sales Call Plan Worksheet** page.
 - If the sales order is not created from the **Sales Call Plan Worksheet** page:
 - The value is updated with the **Salesperson Code** field value on the **Ship-to Address** page linked to the **Customer Card** page.
 - If it's empty, the value is updated with the **Salesperson Code** field value from the associated **Customer Card** page.
 - **User Setup:** The **Inside Salesperson Code** field value on the **Sales Order** page is inherited based on the following hierarchy:
 - The **Salespers./Purch. Code** field value on the **User Setup** page.
 - If the **Salespers./Purch. Code** field value is empty, but the **User ID** field value on the **User Setup** page is available, then the **Inside Salesperson Code** field value on the **Sales Order** page is left empty.



- If both the **Salespers./Purch. Code** and **User ID** fields are blank on the **User Setup** page, the value is inherited from the **Inside Salesperson Code** field on the associated **Customer Card** page — this happens only when the **Include in Call Plan** toggle on the **Customer Call Plan Setup** page linked to the **Customer Card** is turned on.
- If the **Salespers./Purch. Code** and **User ID** fields on the **User Setup** page and the **Inside Salesperson Code** on the **Customer Card** are all empty, the system displays a notification message and prompts you to enter the value manually.

6. In the **Last Used Call Plan Date Updates From** field, select the required option from the dropdown menu.

The field determines the criteria for updating the **Last Used Call Plan Date** field. If you select the *Generate* option, the last call plan date used will be updated from the **Generate Call Plan Lines** action. On the other hand, if you select *Complete*, the last call plan date you used will be updated when the **Call Plan Status** field value is changed to *Completed* on the sales call plan worksheet line.

Note

When updating the **Last Used Call Plan Date** field, the update only occurs if the current value is earlier than the replacement value or if it's blank.

7. On the **Default Call Days** FastTab, you can select any days of the week from the dropdown in each field. This specifies the default call day on which the customer to be contacted for the specific shipment day. For example, if Friday has been selected in the **For Monday Shipment** field, the salesperson should call the customer on Fridays for Monday shipment.
8. On the **Order Entry Cut-off Times** FastTab, in the **Timezone** field, select the appropriate time zone. This configuration determines how the system evaluates the specified cut-off times.
9. In the day fields, enter the cut-off time for each day. The field value defines the time after which sales lines are no longer editable in sales documents created on that specific day (call day), regardless of the shipment day. These restrictions apply only when the **Enable Cut-off Restrictions** toggle is turned on for the respective sales document.
10. On the **Standing Orders** FastTab, turn on the **Enable Standing Orders** toggle to activate standing orders functionality across the system. For more information, see [Understand standing order](Understand standing orders.md).

Note

If no number series is selected in the **Standing Order Nos.** field, the system prompts you to select a value before you can turn on the toggle.

11. In the **Standing Order Nos.** field, select the number series for standing orders.

12. In the **Sales Default Entry Method** field, select how quantities are entered. The available options are:



- *Replace*: The system replaces the current quantity value in the daily quantity fields with the new entry.
- *Adjust*: The system adds the new entry to the existing quantity in the daily quantity fields to calculate the updated total.

13. In the **Sales Date to Use** field, select the date field to use for conversion validation. The available options are:

- *Req. Delivery Date*
- *Shipment Date*

14. In the **Sales Conversion Method** field, select the conversion method for converting standing orders to sales orders. The available options are:

- *Single Date*: Converts standing orders for a specific date.
- *Range of Dates*: Converts standing orders for a range of dates.

15. In the **Sales Conversion Start Date Offset** field, enter a positive integer to define the number of days from the current date to begin conversions.

16. In the **Sales Conversion Range Duration (Days)** field, enter a positive integer to set the number of days in the date range for conversion reports when the **Sales Conversion Method** field is set to *Range of Dates*.

17. In the **Converted Sales Order Nos.** field, select the number series to use for sales orders generated from standing order conversion. If left blank, the system uses the default number series defined on the **Sales & Receivables Setup** page.

 Note

If the **Enable Standing Orders** toggle on the **Sales Call Plan Setup** page is turned off, the system displays an error message when you open pages related to standing orders.



Set up call plan structure for customer

Article • 10/22/2025 • 17 min read

The call plan structure helps to configure how and when the customer or ship-to address is included in the call plan worksheet. You can access the **Call Plan Structure** FastTab directly from the **Customers** or **Ship-to Address** list and card pages. This provides the resulting records filtered to the customer/ship-to address.

Access call plan structure from customer record

The following procedure describes how to access the call plan structure from the customer card or list page.



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.

2. On the action bar, select **More Options** > **Related** > **Customer** > **Call Plan Setup**.

The **Customer Call Plan Setup** page for the selected customer opens.

The **Call Plan Structure** FastTab is accessible where you can add, modify or delete the data. Alternatively, select



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

The **Customers** list page opens.

3. Select a customer on the customer list page.

The **Customer Card** page of the selected customer opens.

4. On the action bar, select **More Options** > **Related** > **Customer** > **Call Plan Setup**.

The **Customer Call Plan Setup** page for the selected customer opens.

The **Call Plan Structure** FastTab is accessible where you can add, modify or delete the data.

Note

The call plan structure is accessible even if a customer is not included in the call plan.

Access call plan structure using ship-to address

The following procedure describes how to access the **Call Plan Structure** FastTab from **Ship-to Address** card or list.



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.



2. On the action bar, select **More Options** > **Related** > **Customer** > **Ship-to Addresses**.

The **Ship To Address List** page for the selected customer opens.

3. On the action bar, select **More Options** > **Related** > **Call Plan Setup**.

The **Customer Call Plan Setup** page for the selected customer opens. The **Call Plan Structure** FastTab is



accessible on this page. Alternatively, select the Search icon , enter **Customers**, and then choose the related link.

The **Customers** list page opens.

4. On the action bar, select **More Options** > **Related** > **Customer** > **Ship-to Addresses**

The **Ship-to Address List** page for the selected customer opens.

5. Select the specific Ship-to Address **Code**.

The **Ship-to Addresses** card page of the selected customer opens.

6. Select **Related** > **Call Plan Setup**.

The **Customer Call Plan Setup** page for the selected customer opens. **Call Plan Structure** FastTab is accessible on this page.

Insert/modify/delete call plan structure records

The following procedure describes how to insert/modify/delete the call plan structure records.



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

The **Customers** list page opens.

2. On the action bar, select **More Options** > **Related** > **Customer** > **Call Plan Setup**.

The **Customer Call Plan Setup** page for the selected customer opens.

3. On the **Call Plan Structure** FastTab, select **Manage** > **New Line**.

Alternatively, select the existing record from the table, choose the three vertical dots to open the context menu and then choose **New Line**.

This inserts a new line to create a record in the call plan structure table.

4. Select the specific line in the call plan structure table and you can modify the fields as required.

5. Select the specific line in the call plan structure table, choose the three vertical dots to open the context menu and then choose **Delete Line**.

Alternatively, select the existing record from the table, select **Manage** > **Delete Line**.

This deletes the specific record from the call plan structure record.

6. To select multiple records, choose the three vertical dots to open the context menu and then choose **Select More**.

Now you can delete the multiple records by following the previous step.



 Note

If two records are created with same details for the same customer/ship-to/shipment day/starting date, an error message pops up as duplication are not allowed.

Set call days in relation to shipment days

The following procedure describes how to set Call Day in relation to Shipment Day.



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Select a customer on the customer list page.
The **Customer Card** page of the selected customer opens.
3. On the action bar, select **More Options > Related > Customer > Call Plan Setup**.
The **Customer Call Plan Setup** page for the selected customer opens.
4. On the **Call Plan Structure** FastTab, select **Manage > New Line**.
This inserts a new line for entry.
5. Select the **Starting Date** to specify the day from which the call plan structure line is active.
This is a required field.
6. Select the **Ending Date** to specify the day from which the call plan structure line is active.
This is an optional field.
7. Select the **Shipment Day** from the dropdown.
This specifies on which the day the shipment has to be done to the customer.
The dropdown displays all the days of the week, and the user can select a day.
8. The **Call Day** field is automatically populated based on the defined value in the **Shipment Day** field.
If you want to change the call day, then select the **Call Day** from the dropdown.
This specifies on which day the customer has to be contacted prior to the shipment day.
The dropdown displays all the days of the week, and the user can select a day.

Customer/ship-to starting date conditions

When there are multiple records with the same shipment day and call day, on generating the call plan lines for the desired call day, the record having the most recent starting date with the entered call date is filtered and displayed in the sales call plan worksheet entry line.





1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the action bar, click **Generate Call Plan Lines**.
A dialog box with the selected worksheet name opens.
3. On the **Options** FastTab, in the **Call Date** field, select a date.
 - a. If a record exists on the same date as entered in the **Call Date** field, the same record will be filtered and displayed.
 - b. If multiple records for the same call day exist, with the same shipment days, the record with the most recent starting date will be filtered and displayed.
 - c. If records have the same shipment days, but different call days with respect to the entered call date exists, then no record is filtered.Multiple records with the same shipment day and starting date cannot exist.

To access standing orders from a customer



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Select a customer on the customer list page.
The **Customer Card** page of the selected customer opens
3. On the action bar, select **Related > Documents > Standing Sales Orders**.
The **Standing Sales Orders** list page opens, filtered to show standing orders associated with the customer.

To create a standing order from a customer



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Select a customer on the customer list page.
The **Customer Card** page of the selected customer opens
3. On the action bar, select **Actions > New Document > Standing Sales Order**.
The **Standing Sales Order** card page opens with the customer number pre-filled.



To access standing orders from a ship-to address



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. On the action bar, select **More Options > Related > Customer > Ship-to Addresses**.
The **Ship To Address** page for the selected customer opens.
3. On the action bar, select **Related > Standing Sales Orders**.
The **Standing Sales Orders** list page opens, filtered to show only standing orders related to the customer and ship-to code combination.



Sales call plan worksheet

Article • 2/12/2026 • 29 min read

The **Sales Call Plan Worksheet** page displays the list of customers/ship-to addresses to be contacted by the sales department on a specific day of the week regarding their sales orders. It helps to segregate and organize different call plan worksheet batches.

In the **Call Plan Worksheet**, the users can have their own worksheet in which they request the list of customer/ship-to records having to be contacted on a particular day of the week. It provides the ability to efficiently execute the required actions and access required information directly from the worksheet itself.

You can access the **Sales Call Plan Worksheet** page from the **Sales Call Plan Setup** page. This page contains the customers/ship-to addresses. The **Sales Call Plan Setup** page uses this data to configure the call date. Based on the generated sales call plan list, the sales department can track and perform the required actions. On generating call plan lines from **Sales Call Plan Worksheet**, the values (shipment date, route code, and so on) from the **Sales Call Plan Setup** page is inherited to the sales order. The user can add, edit, or delete records in the sales call plan worksheets.

It is also possible to create various worksheet names to segregate one call plan list from other call plans, for example, to personalize a worksheet.

Access sales call plan worksheet

The following procedure describes how to access the **Sales Call Plan Worksheet** page.



1. Select the Search icon , enter **Sales Call Plan Worksheet** , and then choose the related link.

The **Sales Call Plan Setup** page opens.

From this page, you can access the existing worksheet by entering the worksheet name in the **Call Plan Worksheet Name** field.

2. Alternatively, navigate to the **Sales Call Plan Setup** page and select **Call Plan Worksheet Names** on the action bar.

The **Call Plan Worksheet Names** page opens.

3. Select the specific worksheet name to open the **Sales Call Plan Worksheet** page for the particular record.

The details of the contact person are displayed in the right corner of the page which includes **Customer Name**, **Phone No.**, and **E-mail** fields.

Create sales call plan worksheet

The following procedure describes how to create the sales call plan worksheet.





1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Setup** page opens.
2. To create a new worksheet name, click the AssistEdit button on the **Call Plan Worksheet Name** field.
This opens the **Call Plan Worksheet Names** window where it lists all the existing worksheet names.
3. Click **New**.
This displays a new line where you can enter the name of the worksheet and also the description related to the worksheet can be added.
4. Select **OK**.

Delete sales call plan worksheet

The following procedure describes how to delete the sales call plan worksheet.

1. On the action bar of the **Sales Call Plan Setup** page, select **Call Plan Worksheet Names** .
The **Call Plan Worksheet Names** list page opens.
2. Go to the desired call plan worksheet name.
3. In the **Name** field, choose the three vertical dots to open the context menu and then choose **Delete**.
Alternatively, on the action bar, click **Delete**.
You cannot delete the call plan worksheet name if one or more entries exist in the call plan worksheet linked to it.

Add customers in sales call plan worksheet

The following procedure describes how to add customers on the **Sales Call Plan Worksheet** page.



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Click **No.** on the desired customer.
3. On the **Customer Card** page, on the action bar, click **More Options** > **Related** > **Customer** > **Call Plan Setup**.
The **Customer Call Plan Setup** page for the specific customer opens.
4. On the **General** FastTab, turn on the **Include in Call Plan** toggle to add the customer in the **Call Plan**.
5. Select the desired value in the **Inside Salesperson Code** field from the list.
6. Choose the AssistEdit button to the right of the **Contact No.** field and select the desired **Code** of the customer.
Contact Name, **Phone No.**, and **Email** fields are automatically populated with the name associated with the **Code**.



- 7. Turn on the **Include for Cut-off Time Restrictions** toggle to include the customer to the cut-off time restrictions.

Add ship-to addresses in sales call plan worksheet

The following procedure describes how to add **Ship-to Addresses** field value in the sales call plan worksheet.



1. Select the Search icon  , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. Select the desired customer **No.**.
The **Customer Card** page opens.
3. Select **More Options > Related > Customer > Ship-to Addresses**.
The **Ship-to Addresses** list of the selected customer opens.
4. Select the desired Ship-to Address **Code**.
The **Ship-to Address** page opens.
5. Select **Related > Call Plan Setup**.
The **Customer Call Plan Setup** page of the specific customer opens.
6. If the customer is not included in the sales call plan worksheet, repeat steps 4 to 8 under [To add customers in sales call plan worksheet](#) to complete the process. Otherwise, an error message stating that the customer is not included in the call plan setup will pop-up.

Edit and update sales call plan worksheet entry status

The following procedure describes how to edit and update the sales call plan worksheet entry status.



1. Select the Search icon  , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
It displays all the call plan lines associated with the **Call Plan Worksheet Name** without any filters.
3. On the **Call Plan Status** field, you can choose the status of the call plan from the dropdown.
It has three options as follows:

Field	Description
New	Indicates that the customer has not yet been called. It is the default option.
Retry	Indicates that the customer must be contacted (again) later for some reason. It is represented in orange color.



Completed

Indicates that the customer has been called and any sales order(s) has/have been created. It is represented in green color.

The call plan status can be changed and updated in the call plan worksheet by the user accordingly.

View sales orders and worksheet records for worksheet entry

The following procedure describes how to view the number of sales orders and worksheet records related to the worksheet entry.



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
It opens a dialog box with the selected worksheet name.
4. On the **Options** FastTab, in the **Call Date** field, select a date.
It inserts an entry line automatically for the selected call date with the shipment date.
5. Select a call plan worksheet entry which has been added to the list as a result of generating call plan lines.
There are two fields in the inserted call plan worksheet entry which display the number of call plan entries and orders linked to the specific customer/ship-to address. They are:

Field	Description
Call Plan Orders	Specifies the number of sales call plan worksheet lines planned on the same call date for the same customer/ship-to addresses.
Existing Orders	Specifies the number of sales orders that exist with the same shipment date for the same customer/ship-to addresses.

A subpage can be opened for both fields to see related orders for the existing order and existing records in the whole call plan worksheet for call plan orders.

Send email from sales call plan worksheet

The following procedure describes how to send an e-mail from the **Sales Call Plan Worksheet** page.





1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
A dialog box with the selected worksheet name opens.
4. On the **Options** FastTab, select a date in the **Call Date** field.
Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.
5. Click **OK**.
A worksheet entry line is created automatically.
6. Select the specific line record for the desired customer.
The contact details of the selected customer is displayed in the FactBox.
7. Select the **E-mail** field in the **Contact Details** FactBox.
The **E-mail** page opens.
Alternatively, on the actions bar, click **More Options > Actions > Send Email** to open the **E-mail** page.

View records close to cut-off time in sales call plan worksheet

The **Order Entry Cut-off Time** field is active if the Enable Cut-off Restrictions toggle is turned on and the **Cut-off Warning Minutes** field value is filled on the **Sales Call Plan Setup** page.



1. Select the Search icon , enter **Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
It opens a dialog box with the selected worksheet name.
4. On the **Options** FastTab, in the **Call Date** field, select a date.
It inserts an entry line automatically for the selected call date.
5. The **Order Entry Cut-off Time** field is visible.
It specifies the time after which any modification or insertion of new lines in sales orders for the specified customer and shipment date becomes restricted.
The field value turns orange for the duration specified in the **Cut-off Warning Minutes**. It turns red when it reaches the cut-off time.
This value is entered on the **Sales Call Plan Setup** page.



For example, if the Order Entry Cut-off time is 4:00 PM and the Cut-off Warning Minutes is 30 minutes, then the Order Entry Cut-off Time field value will turn orange at 3:30 PM and turns red at 4:00 PM.

Create sales order from sales call plan worksheet

The following procedure describes how to create a sales order from the sales call plan worksheet.



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.

2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
It displays all the call lines associated with the sales call plan worksheet.

3. Select the call plan line in the worksheet to select the customer/ship-to address for which a new sales order must be created.

4. On the action bar, click **New Sales Order**.

The **Sales Order** page opens for the selected Customer/Ship-to addresses. The relevant fields (Ship-to Code, Customer No., Shipment Date, and Delivery Date) are automatically filled with data from the call plan entry. The **Inside Salesperson Code** field on the **Sales Order** page is filled based on the input given in the **Source of Inside Salesperson Code** field on the **Sales Call Plan Setup** page. If *Call Plan* is selected in the **Source of Inside Salesperson Code** field, the value from the call plan worksheet entry is automatically populated in the **Salesperson Code** field. Otherwise, you can select the code from the user setup records. If the **User Setup** page has no record, then the **Inside Salesperson Code** field value is generated from the **Sales Call Plan Worksheet** page.

Move call plan record to different worksheet

1. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
It displays all the call lines associated with the call plan worksheet.

2. Navigate to the call plan lines and select the lines to be moved from the worksheet.
To select multiple lines, choose the context menu next to the **Call plan Status** column and then choose *Select More*.

3. On the action bar, click **Actions > Move Lines**.

This opens a **Move Work Sheet Lines** page which displays the **No. of Selected Lines** and **From Call Plan Worksheet Name**.

4. On the **Options** FastTab, in the **To Call Plan Worksheet Name** field, choose the required Name from the dropdown menu.

5. Click **OK**.



Generate new records in sales call plan worksheet

The following procedure describes how to generate new records in the sales call plan worksheet.



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.

The **Sales Call Plan Worksheet** page opens.

2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.

3. On the action bar, click **Generate Call Plan Lines**.

It opens a dialog box with the selected worksheet name.

4. On the **Options** FastTab, in the **Call Date** field, select a date.

Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.

Note

The **Last Used Call Plan Date** field on the **Customer Call Plan Setup** page of a customer is filled out with the date from the **Call Date** field of the most recent call plan line generated for a customer, ship-to location, or day of the week. This field is editable and essentially shows the last date on which the call plan was generated for a particular customer, ship-to location, or day of the week.

5. Turn on the **Clear Existing Lines** toggle. If the toggle is turned on, the existing lines in the call plan worksheet will be deleted and replaced. If the toggle is turned off, the new lines will be added to the call plan worksheet along with the selected call line.
6. Turn on the **Ignore Last Used Call Plan Date** toggle to generate call plan lines without considering the last used call plan date. This enables you to pull in all records for a specific call date, regardless of the frequency or previous call dates used. It can be useful when previous call plan records are deleted and need to be recreated in the future.
7. Click **OK**.

Filter fields while generating sales call plan lines

The following procedure describes how to filter fields while generating sales call plan lines.



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.

The **Sales Call Plan Worksheet** page opens.



2. On the action bar, click **Generate Call Plan Lines**.

It opens a dialog box with the selected worksheet name.

3. On the **Filter** FastTab, the following filter fields are available:

Inside Sales Person

Customer No.

Responsibility Center No.

Ship to Code

The records can be filtered with the application of filters as required.

Delivery date

The **Delivery Date** field on the **Sales Call Plan Worksheet** page record is calculated and displayed corresponding to the shipping date and shipping time.



1. Select the Search icon , enter **Call Plan Worksheet**, and then choose the related link.

The **Sales Call Plan Worksheet** page opens.

2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.

3. On the action bar, click **Generate Call Plan Lines**.

A dialog box opens with the selected worksheet name.

4. On the **Options** FastTab, in the **Call Date** field, select a date.

Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.

Note

If you select a completed date, an error appears.

5. Click **OK**.

A worksheet entry line is created automatically.

Trigger phone call

With this feature, you can call the person to be contacted from the **Sales Call Plan Worksheet**. By selecting the **Phone No.** in the **Contact Details** FactBox, you access the **Microsoft Teams** page and can dial the contact



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.

The **Sales Call Plan Worksheet** page opens.



2. On the **Call Plan Worksheet Name** FastTab, click the **AssistEdit** button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
A dialog box with the selected worksheet name opens.
4. On the **Options** FastTab, in the **Call Date** field, select a date.
Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.
5. Click **OK**.
This inserts a worksheet entry line automatically.
6. Click the created worksheet entry line.
7. On the **Contact Details** FactBox, click the **Phone No.**
This navigates you to the **Microsoft Teams** page where you find a confirmation message to call the person.
8. Click **Yes**.

Convert a standing order from the worksheet

On the **Sales Call Plan Worksheet** page, you can verify whether a sales order has already been created from a standing order before performing any action.

The following fields help you determine the status.

Field	Description
Standing Order No.	Displays the standing order number matching the customer, ship-to code, and worksheet date (based on the Date to Use field value on the Sales Call Plan Setup page). You can select this field value to open the Standing Order Card page.
Standing Order Converted	Displays whether a sales order has been created from the standing order.
Standing Order Conversion Errors	Displays the number of error log entries with the Status field value set to <i>Error</i> for this standing order and date. You can select this field value to and view error details.

The worksheet date used for matching depends on the **Date to Use** field value configured on the **Sales Call Plan Setup** page.

If a sales order has not yet been created, you can convert the standing order directly from the worksheet.

To convert a standing order from the worksheet, follow these steps:

1. On the **Sales Call Plan Worksheet** page, select a record with the **Standing Order No.** field value.
2. On the action bar, select **Convert Standing Order**.



Call Plan

The system converts the standing order for that specific date only and updates the worksheet to reflect the conversion. This action is available only when one record is selected, and when the standing order is not converted to a sales order.

You can view whether the sales order is created from a standing order from the following information on the **Sales Call Plan Worksheet** page.



Sales order

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Inside salesperson code in sales order

On the **Sales Order** page, the **Inside Salesperson Code** field is editable, where you can select the *Code* from the existing list.

To select the inside salesperson code on the **Sales Order** page, follow these steps:

1. Open the **Sales Order** page of the desired customer.
2. On the **General** FastTab, in the **Inside Salesperson Code** field, you can select the new salesperson.

Inside salesperson code in sales order when created from sales call plan worksheet

On the **Sales Order** page, the **Inside Salesperson Code** field value is based on the value defined in the **Source for Inside Salesperson Code** field on the **Sales Call Plan Setup** page.

1. If you select *Call Plan*, the inside salesperson code is generated from the sales call plan worksheet entry.
2. If you select *User Setup*, the inside salesperson code is generated from the user ID. If the **User Setup** page has no salesperson code, the sales order stays empty, yet if the user setup record does not exist, then it is filled with the sales call plan worksheet entry value.

Inside salesperson code in sales order when not created from sales call plan worksheet

When the sales order is not created from the sales call plan worksheet or when customer/ship-to addresses is changed, the **Inside Salesperson Code** field value is automatically updated depending on the options as follows:

1. If *Call Plan* is selected, the value is generated from **Ship-to Code** or **Customer No**.
2. If *User Setup* is selected, the value is generated from the **Salesperson Code** of user setup record with respect to the customer. If **User Setup** page has no records, then the **Inside Salesperson Code** field value is generated from the **Customer Card** page.
 - a. On the action bar, select **Sales Orders**.
The **Sales Orders** list page opens.
 - b. On the action bar, select **New**.
The new **Sales Order** page opens.



- c. Select the desired **Customer Name**.
- d. The **Inside Salesperson Code** field is automatically populated based on the call plan setup.

 Note

If the **Source for Inside Salesperson Code** field on the **Sales Call Plan Setup** page has the value of call plan, then the value is filled from the **Customer** or **Ship-to Addresses** page. If it has no value, then the field on the sales order remains empty. If the **Source for Inside Salesperson Code** field is blank on the **Customer** or **Ship-to Addresses** page, then a notification message appears.

View inside salesperson code in sales order created from sales call plan worksheet

The following procedure describes how to view the **Inside Salesperson Code** field value on the sales order created from the sales call plan worksheet.



1. Select the Search icon  , enter **Call Plan Worksheet**, and then choose the related link.

The **Call Plan Worksheet** page opens.

2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.

3. On the action bar, click **Generate Call Plan Lines**.

A dialog box opens with the selected worksheet name.

4. On the **Options** FastTab, in the **Call Date** field, select a date.

Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.

5. Click **OK**.

A worksheet entry line is created automatically.

6. Click the created worksheet entry line.

7. On the action bar, click the **New Sales Order**.

8. The **Sales Order** page opens.

The **Inside Salesperson Code** field will have the value from the sales call plan worksheet entry.

Update call plan status

When you create a new sales order on the **Sales Call Plan Worksheet** page, the status changes from *New* to *Completed*.





1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, select the AssistEdit button and select the desired name.
3. On the action bar, click **Generate Call Plan Lines**.
A dialog box opens with the selected worksheet name.
4. Fill in the fields as necessary.
5. Click **OK**.
A worksheet entry line is created automatically.
6. Click the created worksheet entry line.
7. On the action bar, click the **New Sales Order**.
8. Fill in the fields as necessary.
9. Click **OK**.
The status of the entry line for which the new sales order has been created is automatically changed to *Completed*.

Manage cut-off time restrictions

The **Include for Cut-off Time Restriction** field on the **Sales Order** page is automatically filled based on the value provided in the **Enable Cut-off Restrictions** field on the **Sales Call Plan Setup** page.

When the **Sell to Customer No.** field value is changed on the **Sales Order** page, the corresponding value in the **Include for Cut-off Time Restriction** field is automatically updated.

View include for cut-off time restriction in sales order created from sales call plan worksheet

The following procedure describes how to view the **Include for Cut-Off Time Restriction** toggle on the **Sales Order** page created from the sales call plan worksheet.



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
A dialog box with the selected worksheet name opens.
4. On the **Options** FastTab, in the **Call Date** field, select a date.



5. Click **OK**.

This inserts a worksheet entry line automatically.

6. Click the created worksheet entry line.

7. On the action bar, click **New Sales Order**.

The cut-off time restriction is set based on the days of the week when the shipment date is planned.

The **Sales Order** page opens.

The **Include for Cut-Off Time Restriction** toggle status is inherited from the **Customer Call Plan Setup** page.

Cut-off time restriction prevents sales line to insert/modify/delete

A sales line of type, item, cannot be newly created or the existing sales line cannot be modified or deleted, when the system time is at or later than the cut-off time restriction. The cut-off time restriction setting is done on the **Sales Call Plan Setup** page. This is applicable for the sales orders in which the **Include for Cut-off Time Restriction** toggle is turned on. The cut-off time restriction is set based on the days of the week when the shipment date is planned.



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.

The **Sales Call Plan Worksheet** page opens.

2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.

3. On the action bar, click **Generate Call Plan Lines**.

A dialog box with the selected worksheet name opens.

4. On the **Options** FastTab, in the **Call Date** field, select a date.

5. Click **OK**.

This inserts a worksheet entry line automatically.

6. Click the created worksheet entry line.

7. On the action bar, click the **New Sales Order**.

The **Sales Order** page opens.

8. On **General** FastTab, turn on the **Include for Cut-off Time Restriction** toggle.

You can insert a new sales line or modify/delete an existing sales line for the selected sales order before the cut-off time restriction.

You cannot create a new sales line or modify/delete an existing sales line at or after the cut-off time restriction.

For example, if the cut-off time restriction is set to 13:00 hours, the user can insert/modify or delete the sales line at 12:59 hours and cannot make changes at or after 13:00 hours.



Inside salesperson code in posted sales shipment

The **Inside Salesperson Code** field is available on the **Posted Sales Shipment** page. The value for this field is the same as on sales header.



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, select the **AssistEdit** button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
A dialog box with the selected worksheet name opens.
4. On the **Options** FastTab, in the **Call Date** field, select a date.
Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.
5. Click **OK**.
This inserts a worksheet entry line automatically.
6. Click the created worksheet entry line.
7. On the action bar, click the **New Sales Order**.
The **Sales Order** page opens.
8. On **General** FastTab, select the **Inside Salesperson Code**.
9. On **Lines** FastTab, create a sales line for the desired Item.
10. Select **Item No.** from the dropdown.
11. Enter the **Quantity**.
12. On the action bar, select **Posting>Post**.
A dialog box opens with three options :
Ship, *Invoice*, and, *Ship and Invoice*.
13. Select *Ship* and then select **OK**.
The **Posted Sales Shipment** page opens with the same **Inside Salesperson Code** field value on the **Sales Order** page.

Inside salesperson code in posted sales invoice

The **Inside Salesperson Code** field is available on the **Posted Sales Invoice** page. The value for this field is the same as on sales header.





1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. On the **Call Plan Worksheet Name** FastTab, click the AssistEdit button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
A dialog box with the selected worksheet name opens.
4. On the **Options** FastTab, in the **Call Date** field, select a date.
Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.
5. Click **OK**.
This inserts a worksheet entry line automatically.
6. Click the created worksheet entry line.
7. On the action bar, click the **New Sales Order**.
The **Sales Order** page opens.
8. On **General** FastTab, select the **Inside Salesperson Code**.
9. On **Lines** FastTab, create a sales line for the desired Item.
10. Select **Item No.** from the dropdown.
11. Enter the **Quantity**.
12. On the action bar, select **Posting>Post**.
A dialog box opens with three options :
Ship, *Invoice*, and *Ship and Invoice*
13. Select *Invoice* and click **OK**.
The **Posted Sales Invoice** page opens with the same **Inside Salesperson Code** field value on the **Sales Order** page.



Alternatively, select the Search icon , enter **Posted Sales Invoice**, and then choose the related link

Inside salesperson code in sales order archive

The **Inside Salesperson Code** field is visible on the **Archived Sales Order** page, and it has the value from the respective sales order.

To view the **Inside Salesperson Code** on the archived sales order, follow these steps:



1. Select the Search icon , enter **sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.



2. On the **Call Plan Worksheet Name** FastTab, click the **AssistEdit** button and select the desired **Name**.
3. On the action bar, click **Generate Call Plan Lines**.
A dialog box with the selected worksheet name opens.
4. On the **Options** FastTab, in the **Call Date** field, select a date.
Work date is the default date found in the field. The day of the week is filled automatically matching the entered call date.
5. Click **OK**.
This inserts a worksheet entry line automatically.
6. Click the created worksheet entry line.
7. On the action bar, click the **New Sales Order**.
The **Sales Order** page opens.
8. On the **General** FastTab, select the **Inside Salesperson Code**.
9. On the **Lines** FastTab, create a sales line for the desired item.
10. Select **Item No.** from the dropdown.
11. Enter the **Quantity**.
12. On the action bar, select **More options** > **Actions** > **Functions** > **Archive Document**.
13. Click **Yes** to confirm.
14. Click **OK**.
15. On the **General** FastTab, select the value in the **No. of Archived Versions**.
The **Sales List Archive** page opens.
The **Inside Salesperson Code** field is visible with the same value as the base sales order.



Call plan frequency

Article • 4/3/2023 • 2 min read

You can control the frequency of how often the customer/ship-to is to be included in the call plan either on a weekly or bi-weekly basis for the specific call plan structure record.



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. On the action bar, select **More Actions > Related > Customer > Call Plan Setup**.
The **Customer Call Plan Setup** page opens. Alternatively, on the action bar, select **More Actions > Related > Customer > Ship-to Addresses**.
 - a. Select the desired value in the **Code** field.
The **Ship-to Addresses** page for the selected code opens.
 - b. On the action bar, select **Related > Call Plan Setup**.
The **Customer Call Plan Setup** page for the selected customer opens.
3. On the **Call Plan Structure** FastTab, select the dropdown in the **Frequency** field.
The options include *Weekly* and *Bi-Weekly*.
If *Weekly* is selected, the customer/ship-to addresses are contacted every week on the call day.
If *Bi-Weekly* is selected, the customer/ship-to addresses are contacted once every two weeks on the call day.



Last creation date

Article • 4/3/2023 • 2 min read

The **Last Creation Date** field is visible on the **Customer Call Plan Setup** page next to the **Frequency** field on the **Call Plan Structure** FastTab.



1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** list page opens.
2. On the action bar, select **More Actions > Related > Customer > Call Plan Setup**.
The **Customer Call Plan Setup** page opens. Alternatively, on the action bar, select **More Actions > Related > Customer > Ship-to Addresses**.
 - a. Select the desired value in the **Code** field.
The **Ship-to Addresses** page for the selected code opens.
 - b. On the action bar, select **Related > Call Plan Setup**.
The **Customer Call Plan Setup** page for the selected customer opens.
3. On the **Call Plan Structure** FastTab, the **Last Creation Date** field is visible.
It specifies the date on which the previous call plan record was created.
This value is inherited from the **Sales Call Plan Worksheet** page based on the entry created.



Set up sales call plans with responsibility centers

Article • 4/3/2023 • 2 min read

Responsibility centres helps you to have a call plan set up specifically for a customer/ship-to address. When responsibility centres have not been assigned any call plan configurations, on generating call plan lines, the values are populated from the **Sales Call Plan Setup** page or are populated from the responsibility center setup.



1. Select the Search icon  , enter **Responsibility Centers**, and then choose the related link.
The **Responsibility Centers** list page opens.
2. Select the desired **Code**.
The **Responsibility Center Card** page opens.
3. On the action bar, select **Related > Sales Call Plan Setup**.
The **Sales Call Plan Setup** page opens.
4. Enter the required details.

On the **Sales Call Plan Worksheet** page, when **Generate Call Plan Lines** action is selected for a particular customer/ship-to address for which the responsibility centres setup is assigned, the values are populated from it. If not, the values are populated from the **Sales Call Plan Setup** page.



Set up call plan for purchase

Article • 7/23/2024 • 5 min read

The **Purchase Call Plan Setup** page allows you to streamline purchase call planning, ensuring efficient vendor management by setting default call days and specifying the source for the inside purchaser. This page serves as a comprehensive setup interface for defining the default call plan behaviors, enhancing the overall purchase process.

The following steps describe how to set up the purchase call plan.



1. Select the Search icon , enter **Purchase Call Plan Setup**, and then choose the related link.

The **Purchase Call Plan Setup** page opens.

2. On the **General** FastTab, turn on the **Enable Cut-off Restrictions** toggle to enable or disable the cut-off time restriction function.

When turned on, you can specify vendor or order-specific addresses to apply cut-off time restrictions. This ensures that purchase lines for the selected vendors become non-editable after a designated cut-off time, based on the requested receipt date of the order.

3. In the **Cut-off Warning Minutes** field, enter the number of minutes before the daily cut-off time to trigger a warning, visually indicated by a color change within the call plan.

This alerts users that purchase lines for the associated vendor's purchase order may become non-editable after this specified period.

4. In the **Source for Inside Purchaser Code** field, select the required code from the dropdown to specify how the inside purchaser code is determined when generating a purchase order from a call plan worksheet.

The available options are:

- *Call Plan* - The code is inherited from the inside purchaser code from the **Vendor Call Plan Setup** page linked to the relevant vendor or order address. The field is set to *Call Plan* by default.
- *User Setup* - The code can be inherited either from the call plan worksheet line or from the **Salespers./Purch. Code** field on the **User Setup** page associated with the user ID initiating the purchase order. If the **User Setup** has no records, then the inside purchaser code is generated from the **Vendor Card** page.

5. In the **Last Used Call Plan Date Updates From** field, select the required option to define the criteria on which the last used call plan date on the **Vendor Call Plan Setup** page should be updated. The available options are:

- *Generate* - The last used call plan date will be updated from the **Generate Call Plan Lines** action.
- *Complete* - The last used call plan date will be updated from the call plan worksheet line when the **Call Plan Status** field is set to *Complete* on the **Purchase Call Plan Worksheet** page.

6. On the **Default Call Days** FastTab, you can choose any day of the week from the dropdown menu for each field. This determines the default call day on which the vendor will be contacted for a specific receipt day. For example, if you select *Tuesday* in the **For Monday Receipt** field, the purchase agent should call the vendor on Tuesdays for Monday receipts.



7. On the **Order Entry Cut-off Times** FastTab, enter the time in each field to specify the cut-off time on a particular day.
After this time, the purchase lines related to vendors may become non-editable in the purchase documents. The specified day for the cut-off time pertains to the scheduled call day, not the receipt day. This applies to purchase documents where the **Enable Cut-off Restrictions** toggle is turned on.
8. On the action bar, select **Call Plan Worksheet Names** action to view or create call plan worksheets.
These worksheets list the vendors that the purchasing department will contact on specific days of the week regarding their purchase orders.

The **Purchase Call Plan Setup** page offers enhanced flexibility to configure the source for inside purchasers and define default call days for vendor contact, ensuring timely communications for specific receipt days.



Set up call plan structure for vendor

Article • 7/23/2024 • 4 min read

The call plan structure helps to configure how and when the vendor or order address is included in the purchase call plan worksheet. This setup ensures that the generated records are specifically tailored to reflect the originating vendor or order address associated with the user.

Access call plan structure from specific vendor or order address

The following procedure describes how to access the call plan structure from the **Vendor Card** page.

1. Open the desired **Vendor Card** page.
2. On the action bar, select **Related** > **Vendor** > **Call Plan Setup**.

The **Vendor Call Plan Setup** page opens.

Note

You can also navigate to the **Vendor Call Plan Setup** page from the **Vendors** list page by selecting **More Options** > **Related** > **Call Plan Setup** on the action bar.

3. On the **General** FastTab, turn on the **Include in Call Plan** toggle if you want to include the vendor in the call plan.
4. Turn on the **Include for Cut-off Time Restriction** toggle to include the cut-off time restriction. Once included, the purchase lines for this vendor will become non-editable after the specified cut-off time on the **Purchase Call Plan Setup** page based on the order's requested receipt date. Subsequently, this will be carried over to the new purchase order created for the desired vendor.

Note

If the **Enable Cut-off Time Restriction** toggle on the **Purchase Call Plan Setup** page is turned off, the restriction will not apply to any vendor, even if a vendor has the **Include for Cut-off Time Restriction** toggle turned on. The main setting overrides the individual vendor settings.

5. Fill out the necessary contact information fields, which will be used to contact the vendor regarding the call plan.
6. On the **Call Plan Structure** FastTab, in the **Requested Receipt Day** field, select the requested receipt day for which a call day is to be set up.
7. In the **Call Day** field, select the day on which the vendor should be contacted regarding purchase orders. If there is a predefined default call day set on the **Purchase Call Plan Setup** page, it will inherit the call in this field.



 Note

If there are multiple records for the same call day and requested receipt day, the record with the most recent starting date is used.

8. In the **Call Window Starting Time** field, enter the start time for contacting the vendor on the scheduled call day.
9. In the **Call Window Ending Time** field, enter the end time for contacting the vendor on the scheduled call day.
10. In the **Starting Date** field, select the start date from which the call plan structure line should become active.
11. In the **Ending Date** field, select the end date until which the call plan structure line should remain active.
12. In the **Note** field, enter additional information related to the call plan structure line.
13. In the **Frequency** field, select the required option to decide how often to include the vendor in the call plan worksheet. It could be weekly, bi-weekly, every three weeks, or every four weeks, depending on the chosen schedule. This ensures regular communication with the vendor every one to four weeks, starting from the specified day.

The **Last Creation Date** field indicates the date on which the previous call plan record related to the selected vendor was created.

The **Last Used Call Plan Date** field displays the date based on the most recent call plan generated for the vendor, order address, or specific day of the week. The system considers the option selected in the **Last Used Call Plan Date Updates From** field on the **Purchase Call Plan Setup** page to update this field.

 Note

This field can be modified only if the current value is earlier than the replacement value or if it's blank.

You can also add, edit, or delete the call plan structure records for accurate vendor call plans. However, creating two records with the same vendor, order address, requested receipt day, and starting date will prompt an error message.

To configure the call plan structure for specific order addresses, follow the steps below:

14. Open the **Vendor Card** page.
15. On the action bar, select **Related > Vendor > Order Addresses**.
The **Order Address List** page opens.
Alternatively, you can access this page by navigating from the **Vendors** list page.
16. Select the specific code to open the **Order Address** page.
17. On the action bar, select **Related > Call Plan Setup**.
The **Vendor Call Plan Setup** page opens.
18. Fill in the required details.

You can create and manage call plans for each order address, similar to the setup for vendor call plans.



Purchase call plan worksheet

Article • 7/23/2024 • 7 min read

You can generate personalized worksheets within the **Purchase Call Plan Worksheet** page.

The worksheet compiles and categorizes vendors and order addresses for purchase department contacts on designated weekdays concerning their purchase orders. It also aids in structuring and managing various batches within the worksheet.

The field values on the worksheet page are filled in based on the setup from the **Vendor Call Plan Setup** page. Additionally, the order entry cut-off time values are inherited from the **Order Entry Cut-off Time** FastTab on the **Purchase Call Plan Setup** page. You have the option to adjust the values according to your needs.

1. Open the **Purchase Call Plan Worksheet** page.
2. In the **Call Plan Worksheet Name** field, select or enter the desired name.
The field includes a list of vendors to be contacted regarding their purchase orders on a specific date, assigned to a particular purchasing agent.

The information associated with the chosen worksheet name is then displayed on the page.

Field	Description
Call Plan Status	Displays the status of the call plan. The available options are: • <i>New</i> - The vendor has not yet been contacted. • <i>Completed</i> - The vendor has been successfully called and processed all required purchase orders. • <i>Retry</i> - The vendor needs to be contacted again later due to specific reasons.
Call Date	Displays the call date for contacting the vendor regarding purchase orders.
Inside Purchaser Code	Specifies the code of the responsible user for contacting the vendor and handling their purchase orders.
Requested Receipt Date	Specifies the date when purchase orders were requested, and the vendor should be contacted.
Request Receipt Day	Displays the day when purchase orders were requested, and the vendor should be contacted.
Expected Receipt Date	Specifies the date when items are expected to be available in the warehouse, and it is automatically calculated by the system. This date is derived from several factors, including the receiving time for the vendor, which defines the standard time required to receive items, and the inbound warehouse handling time, which accounts for the time needed to process incoming goods once they arrive. The Inbound Whse.



	Handling Time field value is defined on the Location Card or Inventory Setup page. Additionally, the calculation includes the default safety lead time and an extra buffer to ensure supply chain reliability, defined on the Manufacturing Setup page. By adding the inbound warehouse handling time and the default safety lead time to the requested receipt date, the system provides a reliable timeframe for when items will be ready for use.
Expected Receipt Day	Displays the day on which the items are expected to be available in the warehouse and is automatically calculated by the system.
Call Plan Orders	View the number of purchase call plan worksheet lines scheduled for the same vendor or order address on a specific call date. This accounts for instances where multiple orders for the vendor are coordinated on the same date, such as over weekends. Additionally, this field assists in identifying any duplicate entries of the same line across various call plan worksheets.
Existing Orders	View the number of purchase orders that share the same requested receipt date for a given vendor or order address. Once these purchase orders are invoiced, they will be removed from the existing orders record.
Blocked	View the transactions involving the vendors that are unable to proceed due to factors like vendor insolvency and operational issues.
Vendor No.	Displays the assigned number series of the vendor to be contacted.
Order Address Code	Displays the name designated for the delivery address where purchase orders are to be received.
Call Window Starting Time	Displays the commencement time for initiating contact with the vendor on the scheduled call day.
Call Window Ending Time	Displays the conclusion time for contacting the vendor on the scheduled call day.
Order Entry Cut-off Time	Displays the time frame for modifying, deleting, or adding new line items or quantities on the purchase orders for the desired vendor, including the requested receipt date, by cut-off time constraints detailed on the Purchase Call Plan Setup page. When the order entry cut-off time is not within the warning period or the cut-off period, it will be displayed in Black. This indicates that there are no immediate time constraints on modifying the purchase order. Yellow highlights indicate that the warning cut-off minutes threshold has been reached, signaling that the cut-off time is near, while Red highlights signify that the cut-off time has been reached and modifications are no longer permitted.
Note	Specifies the additional information related to the purchase call plan worksheet if necessary.



3. On the action bar, select **Generate Call Plan Lines**.

The **Generate Call Plan** page opens.

You can generate call plan lines using the specified call date and vendor filters provided on the page.

4. On the action bar, select **New Purchase Order**.

The **Purchase Order** page opens.

You can generate a new purchase order for the selected vendor using the call plan line information, including values from the **Order Address Code**, **Inside Purchaser Code**, **Expected Receipt Date**, and **Requested Receipt Date** fields.

Note

When you create a purchase order directly, the **Inside Purchaser Code** field value gets inherited from the vendor's header information.

When you create a new purchase order for the selected call plan line, the **Call Plan Status** field on the line is set to *Completed*.

5. On the action bar, select **Actions > Send Email**.

The **Compose an Email** page opens.

You can promptly draft emails for the necessary contacts. To know more, see [To compose and send an email](#).

You can also view or access the contact person's details, including customer name, phone number, and E-mail, on the **Contact Details** FastTab.

If more vendors are included in the call plan, additional lines are added to the same worksheet based on their call structures.

Generate call plan lines on the worksheet

The following procedure describes how to generate call plan lines using the call date and vendor filters. You can also view the number of purchase orders and worksheet records related to the worksheet entry.

1. Open the **Purchase Call Pan Worksheet** page.

2. On the action bar, select **Generate Call Plan Lines**.

The **Generate Call Plan** page opens.

3. On the **Options** FastTab, in the **Call Date** field, select a required date.

The system automatically creates an entry line corresponding to that selected call date. This entry line includes details such as the requested receipt date associated with the chosen call date.

4. Turn on the **Clear Existing Lines** toggle to determine if existing purchase call plan lines should be deleted and new lines created based on the new call plan calculations. If the toggle is turned off, the existing lines are retained, and new lines are added for any new schedules matching the call day.



5. Turn on the **Ignore Last Used Call Plan Date** toggle to exclude the previously used call plan date when generating new call plan lines. This feature allows you to retrieve all records for a specific call date, regardless of the frequency or past call dates used. It is particularly useful if previous call plan records have been deleted and need to be recreated in the future.
6. On the **Filter: Vendor** FastTab, customize the necessary filters like vendor number, responsibility center, etc., linked to vendor records. These filters help specify the vendor criteria for generating call plan lines.

A new call plan entry is created.

Move the call plan record to a different worksheet

To relocate call plan records to a different worksheet, follow the below steps:

1. Open the **Purchase Call Plan Worksheet** page for the required worksheet name.
It displays all the call plan lines associated with the call plan worksheet.
2. Select the lines to be moved from the worksheet.
3. On the action bar, select **Actions > Move Lines**.
The **Move Worksheet Lines** page opens.
4. On the **Options** FastTab, you can view the number of selected call plan lines and the worksheet name.
5. In the **To Call Plan Worksheet Name** field, choose the name of the worksheet where the selected call plan lines should be moved.
6. Select **OK**.

The selected call plan lines are now successfully moved to the specified worksheet.



Set up purchase call plans with responsibility centers

Article • 7/23/2024 • 2 min read

The responsibility centers allows you to create personalized call plans for vendor or order addresses. When responsibility centers do not have assigned call plan setup, the generated call plan lines will be populated from the **Purchase Call Plan Setup** page or settings specific to the **Responsibility Centre Card** page. To know more about responsibility centers, see [Work with Responsibility Centers](#).

1. Open the **Responsibility Centers** list page.
The system displays a list of responsibility centers assigned to the vendors.
2. Select the desired code.
The **Responsibility Center Card** page opens.
3. On the action bar, select **Related > Purchase Call Plan Setup**.
The **Purchase Call Plan Setup** page opens.
4. Enter the required details.

This ensures customized call plans for vendors or order addresses.

Generate call plan lines with responsibility centers

You can generate call plan lines for vendors based on the associated responsibility center. This allows for specific call plan setup to be applied.

1. Open the **Purchase Call Plan Worksheet** page.
2. On the action bar, select **Generate Call Plan Lines**.
The **Generate Call Plan** page opens.
3. On the **Generate Call Plan** page, select the required responsibility center on the **Filter: Vendor** FastTab.

The system will generate call plan lines specifically tailored to vendors associated with the selected responsibility center. If there is no responsibility center assigned to the vendor, the call plan line values are populated from the **Purchase Call Plan Setup** page.



Understand standing orders

Article • 10/22/2025 • 1 min read

Standing orders are recurring order templates that streamline repetitive sales processes by automating the creation of sales orders for regular customers.

You can use standing orders to replace manually creating separate sales orders each week for customers who regularly buy the same products. These orders allow you to

- Set up once, use repeatedly: Create a template with your customer's regular items and weekly quantities.
- Plan by day of the week: Define different quantities for Monday through Sunday based on delivery schedules or customer preferences
- Convert automatically: Transform your standing order templates into actual sales orders with a single click or scheduled automation
- Track and trace: Maintain full visibility of which sales orders originated from which standing order template.



Create standing orders

Article • 10/22/2025 • 2 min read

You can create standing orders to establish recurring weekly order patterns with day-specific quantities and items. This allows you to define different ordering requirements for each day of the week, such as lighter orders on low-business days and higher volumes for weekend deliveries.

To create or modify a standing order, follow the steps below:



1. Select the Search icon , enter **Standing Sales Orders**, and then choose the related link.
The **Standing Sales Orders** list page opens.
2. On the action bar, select **New**.
The **Standing Sales Order** card page opens.
3. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Standing Order No.	Select the standing order number.
Description	Enter a description of the standing order.
Customer No.	Select a customer for this standing order.
Customer Name	Specifies the name of the customer.
Ship-To Code	Select the ship-to address code if different from customer's default code.
Ship-To Name	Specifies the ship-to address name.
Starting Date	Enter the start date from when this standing order becomes effective.
Ending Date	Enter the end date when this standing order expires.
Entry Method	Select <i>Replace</i> or <i>Adjust</i> to control how quantities are entered in the matrix. The default value is inherited from the Sales Default Entry Method field value on the Sales Call Plan Setup page.
Most Recent Converted Date	Specifies the date when the standing order was most recently converted to a sales order.
Status	Select the status of the standing order. The available options are: <i>Draft</i> : The order is under creation or modification. <i>Active</i> : The order is ready for conversion to sales orders. <i>Inactive</i> : The order is no longer in use.



 Note

You can create another standing order with the same date, but when you set its status to active, the system checks for overlaps with other standing orders and displays an error message if any are found.

4. On the **Standing Order Lines** FastTab, enter the required information in the following fields:

Field	Description
Item No.	Select the item for this line.
Variant Code	Select the item variant code.
Description	Specifies the description from the Variant Code field if a variant is selected otherwise, displays the items default description.
Unit of Measure Code	Select the unit of measure of that item.
Sunday	Enter the quantity of orders for Sunday deliveries.
Monday	Enter the quantity to order for Monday deliveries.
Tuesday	Enter the quantity to order for Tuesday deliveries.
Wednesday	Enter the quantity to order for Wednesday deliveries.
Thursday	Enter the quantity to order for Thursday deliveries.
Friday	Enter the quantity of orders for Friday deliveries.
Saturday	Enter the quantity to order for Saturday deliveries.

The system prevents duplicate lines with the same combination of the following field values:

- Item No.
- Variant Code
- Unit of Measure Code



Convert standing orders to sales orders

Article • 10/22/2025 • 2 min read

You can convert standing orders to sales orders either manually or through automated job queue scheduling. The conversion process creates new sales orders based on the standing order configuration and the specified date or date range.

To convert standing orders to sales orders manually, follow these steps below:

1. Select the Search icon, enter **Convert Standing Sales Orders**, and then choose the related link.
The **Convert Standing Sales Orders** page opens.
2. Enter the required information in the following field values:

Field	Description
Conversion Method	Select the method to convert standing orders into sales orders. The available options are: <i>Single Date</i> and <i>Range of Dates</i> .
Conversion Start Date Offset	Select the number of days from today for the starting date.
Conversion Range Duration (Days)	Select the number of days to include in the conversion range.

3. Select **OK** to run the conversion.
The system processes standing orders for the specified date range and creates sales orders.

For each date in the specified range, the system:

- Identifies standing orders where the **Starting Date** and **Ending Date** field values include the conversion date.
 - Checks if a sales header already exists for the same customer, ship-to code, and date (based on the **Date to Use** field value on the **Sales Call Plan Setup** page).
 - If a sales header exists with the same **Standing Order No.** field value, the conversion is skipped and an error log entry is created. If a sales header exists, for the same date but with a different or blank **Standing Order No.** field value, the conversion is skipped and an error log entry is created.

For valid conversions, the system creates a sales header with:

- The **Sell-To Customer No.** and **Ship-To Code** field values from the standing order header.

The system validates each field during entry. If validation fails, the system removes the line and creates an error log entry.



Copy standing orders

Article • 10/22/2025 • 2 min read

You can copy standing order data to create new standing orders or update existing ones. This is useful when you need to extend a standing order pattern or replicate it for different time periods.

Create the next standing order

To create the next standing order that begins after the current one ends, follow these steps:

- 1. Open the required **Standing Sales Order** card page.
- 2. On the action bar, select **Copy Standing Order > To New STO After This**.
The **Copy Standing Order** request page opens.
- 3. On the **Copy From** FastTab, the following fields are displayed:

Field	Description
From Customer No.	Specifies the customer number of the current standing order.
From Ship-To Code	Specifies the ship-to code of the customer associated with the current standing order.
From Code	Specifies the current standing order number.

- 4. On the **Copy To** FastTab, the following fields automatically updated but are editable:

Field	Description
Code	Specifies the next number from the standing order number series.
Customer No.	Enter the customer number of the next standing order.
Ship-To Code	Select the ship-to address code, if different from the default code of the customer.
Starting Date	Enter the start date when this standing order becomes effective.
Ending Date	Enter the end date when this standing order expires.

- 5. Select **OK**.
The system creates a new standing order with copied lines and summarized detail entries, and displays it.



Create a new standing order by copying the previous one

To create a new standing order by copying from the latest one for the same customer and ship-to address, follow these steps:

1. Open the required **Standing Sales Order** card page.
2. On the action bar, select **Copy Standing Order > To New STO After Last**.
The **Copy Standing Order** page opens.
The **Starting Date** field value is inherited with the day after the latest ending date among all standing orders for the same customer and ship-to code.
3. Edit fields as needed and then select **OK**.
The system creates a new standing order and displays it.

Copy from an existing to this standing order

To copy data from one standing order into the current one, follow these steps:

1. Open the required **Standing Sales Order** card page with a valid starting date and ending date.
2. On the action bar, select **Copy Standing Order > To This STO from Existing**.
The **Copy Standing Sales Order** page opens.
3. In the **Copy From Customer No.** and **Copy From Ship-To Code** field values, enter or select values to filter available standing orders.
4. In the **Copy From Code** field, select the standing order you want to copy.
5. Select **OK**. If detail entries already exist for the same items and days, the system prompts for the confirmation.
 - Select **Yes** to replace existing data.
 - Select **No** to cancel the operation.

The page refreshes to display the copied data.

Note

The system summarizes detail entries when copying, creating one record per item line and day of the week. The system does not write records that sum to zero.



Create a new sales order

Article • 10/22/2025 • 3 min read

You can view and manage standing order information directly in the sales call plan worksheet, allowing you to track conversions and convert orders as part of your call plan workflow.

To create a new sales order for a record with a new standing order, follow these steps below:



1. Select the Search icon , enter **Sales Call Plan Worksheet**, and then choose the related link.
The **Sales Call Plan Worksheet** page opens.
2. Select a record with a standing order number, which is an unconverted standing order.
3. On the action bar, select **New Sales Order**.
The system displays a conformation message.
4. Select *New* to to create a new sales order from the standing order. The other options are: *Convert*: Converts the standing order to a sales order. *Cancel*: Cancel the action.

Generate call plan with standing order conversion

To generate call plan records and automatically convert standing orders, follow these steps:

1. On the **Sales Call Plan Worksheet** page, select **Actions > Generate Call Plan**.
The **Generate Call Plan** request page opens.
2. Turn on the **Convert Standing Orders** toggle.
3. Select **OK**. The system displays a confirmation message.
The system:
 - Generates worksheet records based on the call plan configuration.
 - Attempts to convert the standing order for each generated worksheet record that includes one.
 - Skips conversions that fail and logs errors in the standing order conversion error log.
 - Updates the worksheet to reflect successful conversions.

This automated approach streamlines the process of generating call plans and creating sales orders simultaneously.

Track standing orders in sales documents

The standing order number is tracked throughout the sales process to maintain traceability from the original template to posted documents.



Navigate to **Sales Order** page created via standing order conversion. On the **General** FastTab, view the **Standing Order No.** field. This field is non-editable and displays the standing order from which the sales order was created. The standing order number does not copy to other documents created by copying the sales order.

View standing order number in posted documents

Navigate to **Posted Sales Shipment** or **Posted Sales Invoice** page. On the **General** FastTab, in the **Standing Order No.** field, view the standing order number. This field displays the standing order number from the original sales order. The value is transferred during the posting process to maintain traceability in historical records.



Manage standing order detail entries

Article • 10/22/2025 • 1 min read

Standing order detail entries store the quantity data for each item line by day of the week. These records are used during conversion to create sales order lines with appropriate quantities.

To manage standing order detail entries, follow the steps below:

- 1. On the **Standing Sales Order** page, select the AssistEdit button in any of the **Sunday–Saturday** fields to open the **Standing Order Detail Entries** page.
- 2. The **Standing Order Detail Entries** page displays the required information in the following fields:

Field	Description
Standing Order No.	Specifies the identifier for the standing order.
Standing Order Line No.	Specifies the line number for the specific entry within the standing order.
Item No.	Specifies the selected item for this line.
Description	Specifies the description from the Variant Code field value if a variant is selected, otherwise, displays the default description of the item.
Variant Code	Specifies the selected item variant code.
Unit of Measure Code	Specifies the selected unit of measure for the item.
Day of Week	Specifies the day of the week for this quantity entry.
Quantity	Specifies the quantity for the day of the week.

 **Note**

The field values on the **Standing Order Detail Entries** page are non-editable. New entries are created automatically when you modify quantities in the standing order.



Review of conversion errors

Article • 10/22/2025 • 2 min read

The standing order conversion error log provides a centralized location to review, manage, and resolve errors that occur during the conversion process.

To review and manage conversion errors, follow these steps:



1. Select the Search icon , enter **Standing Order Conversion Error Log**, and then choose the related link.
The **Standing Order Conversion Error Log** page opens.
2. Enter the required information of the following fields:

Field	Description
Entry No.	Specifies the unique identifier for the error record.
Processing Date	Specifies the date when the system attempted to convert the standing order.
Conversion Date	Specifies the target date on which the standing order was scheduled to convert into a sales order.
Standing Order No.	Specifies the standing order number where the error occurred. You can select this field to open the related record on the Standing Sales Order page.
Source Type	Specifies the source type of the standing order. Currently, only <i>Customer</i> is supported.
Source No.	Specifies the customer number associated with the standing order that failed to convert.
Source Name	Specifies the customer name corresponding to the Source No. field value.
Address Code	Specifies the ship-to code linked to the delivery address of the customer.
Address Name	Specifies the ship-to address name defined in the customer record.
Line No.	Specifies the line number from the standing order where the error occurred. This field is populated for line-specific errors.
Item No.	Specifies the item number that failed to convert. This field is displayed only for line-specific errors.
Variant Code	Specifies the variant code of the item, if applicable.



Description	Specifies the description of the item on the standing order line.
Unit of Measure Code	Specifies the unit of measure defined for the item (for example, <i>PCS</i> or <i>KG</i>).
Day of Week	Specifies the day of the week defined for the standing order line.
Quantity	Specifies the ordered quantity that failed to convert during processing.
Converted Order No.	Specifies the sales order number that was created even if some lines failed during the conversion.
Status	Specifies the error status: Error (red color), Resolved (yellow color), or Closed (green color).
Error Text	Specifies the system-generated error message, up to 120 characters.
Comment	Enter notes about the error resolution or investigation steps, up to 120 characters. This field is editable.

Update error status

To update the status of one or more error records, follow these steps:

1. On the **Standing Order Conversion Error Log** page, select one or more error records.
2. On the action bar, select **Change Status**.
A dialog opens.
3. Select **Resolved** or **Closed**.
4. Select **OK**.

The system updates the **Status** field value for all selected records and changes the color coding accordingly.

Add resolution notes

To add notes to an error record, follow the steps below:

1. On the **Standing Order Conversion Error Log** page, select the error record.
2. In the **Comment** field, enter your notes up to 120 characters.
The system automatically saves the comment when you move to another field.



Schedule automatic conversion via job queue

Article • 10/22/2025 • 2 min read

To schedule automatic conversion of standing orders, follow these steps:



1. Select the Search icon , enter **Job Queue Entries**, and then choose the related link.
The **Job Queue Entries** page opens.
2. Select **New** to create a job queue entry.
3. Enter the required information in the following fields:

Field	Value
Object Type to Run	Enter <i>Report</i> .
Object ID to Run	Enter <i>ConvertStandingSalesOrder59FDW 70241761</i> to run the object for the recurring current job.
Earliest Start Date/Time	Select the date and time when the job should first run for example, (1:00 AM daily).
Recurrence	Define the schedule for example, (daily or weekly).
Job Queue Category Code	Select a category code to prioritize or group sales tasks. This field is optional.

- The conversion uses the default values configured on the **Sales Call Plan Setup** page.
4. In the **Status** field, select *Active*.
- The job queue runs the conversion automatically according to the schedule. The system executes the report and logs execution outcomes on the **Job Queue Log Entries** page.



View additional details on the FactBox

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You can view additional details on the FactBox of the **Standing Sales Order** page.

In the **Converted Sales Orders** group of the FactBox, you can view a list of sales orders that have been generated from the standing sales orderwith the following details:

Field	Description
Sales Order No.	Specifies the sales order number of the converted document. You can select the field value to navigate to the specific sales order.
Req. Delivery Date	Specifies the requested delivery date for the converted sales order.
Day	Specifies the day of the week corresponding to the requested delivery date.

The list displays converted sales orders in chronological order, allowing you to track all sales orders that have been created from the standing sales order template.

In the **Call Plan Setup** group of the FactBox, you can view the planned shipment schedule with the following details:

Field	Description
Shipment Day	Specifies the day when shipment is scheduled to occur.
Call Day	Specifies the call day associated with the shipment schedule.
Starting Date	Specifies the starting date for the call plan setup entry.
Ending Date	Specifies the ending date for the call plan setup entry.



Integrations

Article • 7/2/2025 • 1 min read

The Aptean Call Plan extension has been integrated with the following extension:

- [Aptean E-Commerce](#)



Aptean E-Commerce

Article • 7/2/2025 • 1 min read

When the Aptean Call Plan extension is used in conjunction with the Aptean [E-Commerce](#) extension, you can enforce sales order cut-off dates and times on the e-commerce platform. For more information, see [Set up call plan for sales](#).

