

User Manual

Aptean Food and Beverage ERP

Contract Management

Product Documentation



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Release notes

Article • 7/22/2026 • 2 min read

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

Date	Release version	Description
July 2026	2602.0.0.0	Major release
June 2026	2601.6.0.0	Minor release
May 2026	2601.5.0.0	Minor release
March 2026	2601.4.0.0	Stability release
February 2026	2601.3.0.0	Stability release
February 2026	2601.2.0.0	Platform release
January 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
September 2025	2503.2.0.0	Stability release
September 2025	2503.1.0.0	Stability release
August 2025	2503.0.0.0	Feature release
August 2025	2502.2.0.0	Stability release
July 2025	2502.1.0.0	Stability release
July 2025	2502.0.0.0	Feature release
June 2025	2501.1.0.0	Stability release
June 2025	2501.0.0.0	Feature release
May 2025	2405.4.0.0	Stability release
May 2025	2405.3.0.0	Stability release
April 2025	2405.2.0.0	Stability release
March 2025	2405.1.0.0	Platform release

March 2025	2405.0.0.0	Feature release
March 2025	2404.5.0.0	Stability release
March 2025	2404.4.0.0	Platform release
February 2025	2404.3.0.0	Stability release
December 2024	2404.2.0.0	Stability release
December 2024	2404.1.0.0	Stability release
November 2024	2404.0.0.0	Feature release
October 2024	2403.6.0.0	Stability release
September 2024	2403.5.0.0	Stability release
August 2024	2403.4.0.0	Platform release
July 2024	2403.3.0.0	Platform release
July 2024	2403.2.0.0	Stability release
June 2024	2403.1.0.0	Stability release
June 2024	2403.0.0.0	Feature release
June 2024	2402.9.0.0	Stability release
June 2024	2402.8.0.0	Stability release
June 2024	2402.7.0.0	Stability release
May 2024	2402.6.0.0	Stability release
May 2024	2402.5.0.0	Stability release
May 2024	2402.4.0.0	Stability release
May 2024	2402.3.0.0	Stability release
May 2024	2402.2.0.0	Stability release
May 2024	2402.1.0.0	Stability release
April 2024	2402.0.0.0	Feature release
February 2024	2401.0.0.0	Initial release



2602.0.0.0

Release Note • 7/22/2026 • 3 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension,

- The price finding takes into account the prices set in sales contracts when a sales order is created from a sales contract or when a sales order is assigned to a sales contract. If the Advanced Pricing app is installed, the "Applied Sales Price and Discount" overview also displays the sales contract from which the price or discount originated. This integration enhancement requires the latest versions of the following apps from the July 2026 release:
 - Advanced Pricing
 - Integration Layer
 - Contract Management
- An integration event has been added in the *SalesContractManagement131FDW* codeunit and the corresponding *PurchContractManagement131FDW* codeunit to handle validation when the document line quantity exceeds the contract quantity. The *OnBeforeCheckIfQtyExceedsOutstandingQty* integration event allows overriding the standard validation using the *IsHandled* pattern to suppress the warning or error when required.
- The printed sales contract report shows the **Terms of Delivery** field, the **Payment Terms** field, the **VAT %** field, the **VAT No.** field, the **Total Excl. VAT** field, and the **Total Incl. VAT** field. This helps to review delivery terms, payment details, VAT information, and totals directly on the report. For more information, see [Reports](#).
- The printed Purchase contract report shows the **Vendor Order No.** field and the **Your Reference** field from the purchase contract, so you can view the vendor's order number and reference on the generated report. For more information, see [Reports](#).
- You can publish sales and purchase contracts directly from the **Sales Contract**, **Purchase Contract**, **Sales Contracts**, and **Purchase Contracts** pages using the **Publish** and **Publish Directly** actions, when the Aptean Document Publication extension is installed. The **Publish** action opens a dialog that lets you change the publication target and mail recipient before publishing, while **Publish Directly** publishes using the default values without showing a dialog. Both actions are available on contracts with the *Open*, *Released*, or *Closed* status, and only when a customer or vendor is specified on the contract. You can publish multiple selected contracts at once from the **Sales Contracts** and **Purchase Contracts** list pages. Before you can publish a contract, you must set up the **Sales Contract Custom Category Code** and/or **Purchase Contract Custom Category Code** field value on the **Contract Setup** page. For more information, see [Publish a contract](#).



Integrations

The Aptean Contract Management extension has been integrated with the Aptean Document Publication extension.

UI/UX changes

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

- The **Publish** action has been added to the **Sales Contract**, **Purchase Contract**, **Sales Contracts**, and **Purchase Contracts** pages.
- The **Publish Directly** action has been added to the **Sales Contract**, **Purchase Contract**, **Sales Contracts**, and **Purchase Contracts** pages.
- The **Sales Contract Custom Category Code** field has been added to the **Contract Setup** page.
- The **Purchase Contract Custom Category Code** field has been added to the **Contract Setup** page.



2601.6.0.0

Release Note • 6/24/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, you can retain the original dates on the purchase document by turning on the **Retain Dates on Purchase Document** toggle on the **Contract Setup** page when you assign a contract. For more information, see [Setup Contract Management](#).

UI/UX changes

The **Retain Dates on Purchase Document** toggle has been added to the **Contract Setup** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
375503	The system fails to display the <i>Retain Dates on Purchase Document</i> option on the Contract Setup page when linking a Purchase Order page to a Purchase Contract page. As a result, the dates on the purchase document are always overwritten by the contract dates.
370326	The system fails to update existing Sales Contracts page when an item is added as an alternate contract item for another item. As a result, the newly added alternate item is not available for selection on documents linked to the contract.



2601.5.0.0

Release Note • 5/27/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, you can:

- View quantities from open return documents separately at the purchase contract line level using the **Contract Qty On Open Purchase Return Documents (Base)** field on the **Purchase Contract** page. For more information, see [Purchase Contract](#).
- View quantities from open return documents separately at the sales contract line level using the **Contract Qty On Open Sales Return Documents (Base)** field on the **Sales Contract** page. For more information, see [Sales Contract](#).

UI/UX changes

The **Contract Qty On Open Purchase Return Documents (Base)** and **Contract Qty On Open Sales Return Documents (Base)** fields have been added to the **Lines** FastTab of the **Purchase Contract** and **Sales Contract** pages respectively.

Resolved issues

The following issue has been resolved in this release.

ID	Description
373759	An error occurs on the Purchase Invoice page when attempting to post the invoice linked to a purchase contract.



2601.4.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, the translation files for the following languages have been updated with standard texts for better readability.

- Danish (da-DK)
- Swedish (sv-SE)



2601.3.0.0

Release Note • 2/25/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension,

- You can view all sales or purchase contracts directly on the related **Customer Card** or **Vendor Card** page using the **Ongoing Sales Contract** or **Ongoing Purchase Contract** tile on the FactBox. Alternatively, you can use the **Sales Contracts** or **Purchase Contracts (Related > Documents> Sales Contracts/ Purchase Contracts)** action on the **Customer Card** or **Vendor Card** page to view the list of associated contracts.
- You can view all sales or purchase contracts on the associated order or return order using the **Ongoing Sales Contract** or **Ongoing Purchase Contract** tile on the FactBox.
- You can create a contract from the related customer or vendor card page using the **Sales Contract** or **Purchase Contract (Actions > New Document > Sales Contract / Purchase Contract)** action. This enhancement addresses the issue reported in bug ID #347088.
- Changes have been made to remove references to the deprecated *Document Attachment Factbox* part from the *PurchaseContract131FDW*, *SalesContract131FDW*, and *SalesContracts131FDW* pages to ensure compatibility with 365 Business Central, version 28.

UI/UX changes

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

- The **Ongoing Sales Contract** tile has been added to the **Sell-to Customer Sales History** FactBox on the following pages:
 - Customers list
 - Customer Card
 - Sales Order
 - Sales Return Order
- The **Ongoing Purchase Contract** tile has been added to the **Buy-from Vendor History** FactBox on the following pages:
 - Vendors list
 - Vendor Card
 - Purchase Order
 - Purchase Return Order



Resolved issues

The following issues have been resolved in this release.

ID	Description
347086	The system fails to update the Description 2 field value on the Sales Order and Purchase Order pages when creating the order from the Sales or Purchase Contract pages respectively.
347088	The system fails to create sales or purchase contract from the related Customer Card or Vendor Card page respectively.



2601.2.0.0

Release Note • 2/12/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, the following changes have been made to ensure compatibility with Business Central, version 28.

- The *Document Attachment Factbox* caption has been renamed to *Doc. Attachment List Factbox* on the *PurchaseContract131FDW*, *SalesContract131FDW*, and *SalesContracts131FDW* pages.
- The *ItemAvailabilityFormsMgt* codeunit has been replaced with the standard *Purch. Availability Mgt.* codeunit on the *PurchaseContractSubform131FDW* page to handle item availability actions (Event, Period, Variant, Location, Lot, and BOM).
- The *ItemAvailFormsMgt* codeunit has been replaced with the standard *Sales Availability Mgt.* codeunit on the *SalesContractSubform131FDW* page to handle item availability actions (Event, Period, Variant, Location, Lot, BOM, and UOM).



2601.1.0.0

Release Note • 1/28/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, you can:

- Retain the original dates on the sales document by turning on the **Retain Dates On Sales Document** toggle on the **Contract Setup** page when you assign a contract.
- View the remaining quantity available on a contract in the **Contract Qty. Remaining** field value on the sales pages. This field complements the existing **Contract Quantity Outstanding** field.
- You can view this field on the **Sales Contract Lines** and **Sales Lines List** pages when you filter by the **Document Type** field value set to *Contract*. The field is hidden by default, but you can enable it through personalization.
- Assign sales contracts to sales lines in the **Contract No.** field regardless of unit of measure (UOM). However, you can change the sales line UOM after assignment without validation errors or blocking messages.
- Assign purchase contracts to purchase lines in the **Contract No.** field regardless of unit of measure (UOM). However, you can change the purchase line UOM after assignment without validation errors or blocking messages.

UI/UX changes

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

- The **Contract Qty. Remaining** field has been added to the **Sales Contract Lines** and **Sales Lines List** pages.
- The **Retain Dates On Sales Document** toggle has been added to the **Contract Setup** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
336063	An error occurs on the Sales Order page when creating a sales order through a sales contract, even if the sales order quantity is equal to the contract quantity.
343094	The system fails to update the Remaining Quantity and Outstanding Quantity field values after shipment or invoicing for sales orders linked to a drop shipment location.



See also

- [Known issues](#) - Lists current issues and their status.



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Approved Suppliers extension. For more information, see [What's new in Approved Suppliers, version 2601.0.0.0](#).



2503.2.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, the system automatically copies extended text comments to the corresponding purchase order lines when a purchase order is created from a purchase contract. This functionality also applies to sales orders.



2503.1.0.0

Release Note • 9/9/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
323215	The system incorrectly recalculates pricing-related field values when the Quantity field value is changed on the Sales Order and Purchase Order pages, despite the Frozen checkbox being selected. This issue occurs only when the Aptean Advanced Pricing extension is installed.



2503.0.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Dynamic Comments extension. To know more, see [What's new in Dynamic Comments, version 2501.0.0.0](#).

Integrations

The Apteian Contract Management extension has been integrated with the Apteian [Dynamic Comments](#) extension. For more information, see [Integrations](#).



2502.2.0.0

Release Note • 8/27/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension,

- The system inherits the **Promised Receipt Date**, **Planned Receipt Date**, and **Expected Receipt Date** field values on the **Lines** FastTab of the **Purchase Order**, **Purchase Credit Memo**, and **Purchase Return Order** pages from the associated **Purchase Contract** page.
- The system inherits the **Planned Delivery Date**, **Planned Shipment Date**, and **Shipment Date** field values on the **Lines** FastTab of the **Sales Order**, **Sales Credit Memo**, and **Sales Return Order** pages from the associated **Sales Contract** page.
- The *CalculateShipToBillToOptions* method is no longer supported on the *SalesContract131FDW* page as part of a code cleanup activity.

Resolved issues

The following issue has been resolved in this release.

ID	Description
312202	The system does not allow modifying the Shipment Date field value on both the header and line of the Sales Contract page after the sales contract is released.



2502.1.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
291341	The system fails to calculate the Contract Qty Received (Base) and Contract Qty On Open Purchase Documents (Base) field values correctly on the Purchase Lines page.
283629	The system incorrectly recalculates the Direct Unit Cost Excl. VAT and Line Discount % field values on the purchase line from the purchase price list, when a value is entered in the Quantity field, even though these values were previously updated from the selected contract.



2502.0.0.0

Release Note • 7/30/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
309881	The system applies the incorrect trade plan rate when global lot attribute values are specified for an item on a sales order created from a sales contract. This issue occurs only when the Aptean Trade Management and Aptean Advanced Attributes extensions are installed.



2501.1.0.0

Release Note • 6/4/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
290164	An error occurs when attempting to create a sales order by executing the Make Order action on the Sales Contract page. This issue arises when the item price is determined through an item discount group from the Sales Price List page.



2501.0.0.0

Release Note • 6/4/2025 • 2 min read

Features

With the features added in this release of the Aptean Contract Management extension:

- You can configure the system to display an error or a warning message if the shipping or receiving quantities exceed the contract quantities when creating a sales or purchase order from a sales or purchase contract. This provides greater flexibility and prevents over-selling or over-ordering via contracts. For more information, see [Set up contract management](#).
- The system inherits contract details from sales and purchase orders (that are linked to sales and purchase contracts) to sales order and purchase order archives, respectively. This ensures traceability and compliance with contractual obligations. For more information, see [View contract information on sales and purchase order archives](#).

Enhancements/Modifications

With this release of the Aptean Contract Management extension, the system displays an error message when deleting sales and purchase contract lines that are linked to open sales and purchase documents, respectively. This enhancement addresses the issue reported in bug ID #272630.

UI/UX changes

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

- The following fields have been added to the **Contract Setup** page.
 - Exceed Purch. Contract Qty. Alert Type
 - Exceed Sales Contract Qty. Alert Type
- The following fields have added to the **Sales Order Archive** and **Purchase Order Archive** pages.
 - Contract No.
 - Contract Line No.

Resolved issues

The following issues have been resolved in this release.



ID	Description
272630	The system incorrectly allows deleting sales and purchase contract lines linked to open sales and purchase documents, respectively.
296944	The system incorrectly allows updating the No. field value on the Lines FastTab of the Purchase Contract page even when the purchase contract line is linked to open purchase documents. This issue occurs when the description of the updated item is the same as the previous item.



2405.4.0.0

Release Note • 5/21/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
278678	The system incorrectly translates the notification message that is displayed after executing the Make Order action on the Purchase Contract page and selecting OK on the Create Contract Orders page. This issue occurs when the language is set to Dutch.
282870	The system incorrectly translates: • The notification message that is displayed after executing the Make Order action on the Sales Contract page and selecting OK on the Create Contract Orders page. • The error message that is displayed when executing the Make Order action on the Sales Contract page with the Qty. to Ship field value as blank. These issues occur when the language is set to Dutch.



2405.3.0.0

Release Note • 5/7/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
282699	An error occurs when manually entering a value in the Contract No. field on the sales or purchase order line for an alternate item. This issue arises even when a valid contract exists and the currency code on the contract matches the currency code on the order.



2405.2.0.0

Release Note • 4/23/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
273768	The system fails to update the Line Discount % field value in sales and purchase order lines when inserting a main item. This issue occurs even when valid contracts exist with a line discount and the Price Calculation Method field value is set to <i>Lowest Price</i> on the Vendor Card or Customer Card page.



2405.1.0.0

Release Note • 3/28/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, the *OnBeforeMakeOrderAction* integration event has been added to the *SalesContract131FDW* page, which allows external extensions to integrate with the order creation process.



2405.0.0.0

Release Note • 3/13/2025 • 1 min read

Features

With this release of the Aptean Contract Management extension, the system applies approved supplier and item requirements to purchase contracts, when the Aptean Approved Supplier extension is installed. For more information, see [Highlights of Approved Supplier, version 2501.0.0.0](#).

Integrations

The Aptean Contract Management extension has been integrated with the Aptean [Approved Supplier](#) extension. For more information, see [Integrations](#).



2404.5.0.0

Release Note • 3/12/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, you can use the **Contract Alternate Item Exists** checkbox to view whether the main item has an alternate item configured in the contract documents on the following pages:

- Purchase Order
- Purchase Invoice
- Purchase Return Order
- Purchase Credit Memo
- Posted Purchase Receipt
- Posted Purchase Invoice
- Posted Purchase Return Shipment
- Posted Purchase Credit Memo
- Sales Order
- Sales Invoice
- Sales Return Order
- Sales Credit Memo
- Posted Sales Shipment
- Posted Sales Invoice
- Posted Sales Return Receipt
- Posted Sales Credit Memo

Note

This functionality works based on the configuration of the **Enable Contract On Purchase** and **Enable Contract On Sales** toggles on the **Contract Setup** page.

This enhancement addresses the issue reported in bug ID #269527.

UI/UX changes

The **Contract Alternate Item Exists** checkbox has been added to the following pages:



- Purchase Order
- Purchase Invoice
- Purchase Return Order
- Purchase Credit Memo
- Posted Purchase Receipt
- Posted Purchase Invoice
- Posted Purchase Return Shipment
- Posted Purchase Credit Memo
- Sales Order
- Sales Invoice
- Sales Return Order
- Sales Credit Memo
- Posted Sales Shipment
- Posted Sales Invoice
- Posted Sales Return Receipt
- Posted Sales Credit Memo

Resolved issues

The following issues have been resolved in this release.

ID	Description
269241	The system incorrectly displays decimal numbers in field values on the Purchase Contract Details FastTab of the Purchase Order page, even when the values are whole numbers.
269527	The Contract Alternate Item Exists checkbox is unavailable in the sales order line, preventing users from identifying whether the main item has an alternate item configured in the contract documents.



2404.4.0.0

Release Note • 3/4/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, the following integration events have been added to the *SalesContractManagement131FDW* codeunit to enhance customization options and provide greater flexibility when creating sales orders from the **Sales Contract** page via the **Make Order** action.

- OnBeforeCreateSalesOrderFromSalesContract
- OnBeforeConfirmCreateSalesOrderFromSalesContract
- OnBeforeOpenCreatedSalesOrder
- OnBeforeModifyUpdateSalesHeader
- OnAfterCreateSalesOrderFromSalesContract



2404.3.0.0

Release Note • 2/25/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
262794	The system fails to retrieve the direct unit cost for both items and alternate items from the related Purchase Contract page and does not update the Direct Unit Cost Excl. VAT field value on the associated Purchase Order page.



2404.2.0.0

Release Note • 12/27/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension,

- The field values on the **Purchase Contract** page are inherited when a contract is created from the **Harvest Order** page.
- When an order is created from a contract, the location from the contract is inherited, even if a default location is set on the associated customer or vendor card.

UI/UX changes

The **Commodity Harvest Planning** FastTab has been added to the **Purchase Contract** page.



2404.1.0.0

Release Note • 12/11/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
250102	An error occurs on the Sales Claims page when attempting to create a sales return order with different location code values on the associated Sales Claims and Sales Contract pages.
250104	An error occurs on the sales order line when header is updated with drop shipment location and the selected item linked to a contract contains warehouse location. This issue occurs only when the Aptean Drop Shipment extension is installed.



2404.0.0.0

Release Note • 11/29/2024 • 3 min read

Features

With the features added in this release of the Aptean Contract Management extension, you can:

- Create purchase contracts from the **Harvest Order** and **Harvest Planning** pages when the Aptean Commodity Harvest Planning extension is installed. To know more, see [Create a purchase contract from harvest order and harvest planning pages](#).
- Define the attributes for the items on the **Sales Contract** and **Purchase Contract** pages, which will transfer to the corresponding sales and purchase documents.
- View only the contract with the same unit of measure on the purchase or sales documents when assigning a contract. You cannot assign a different unit of measure code on these documents while creating an order from the contract.

Integrations

The Aptean Contract Management extension has been integrated with the following extensions:

- The Aptean [Commodity Harvest Planning](#) extension to create a purchase contract from a harvest order.
- The Aptean [Advanced Attributes](#) extension to define the global lot attributes for the items used on the sales and purchase contracts.

UI/UX changes

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

- The **Lot Attribute Requirements** action has been added to the **Lines** FastTab on the **Sales Contract** page.
- The following fields have been added to the **Contract Setup** page.
 - The **Allow Orders Outside Date Range** and **Allow Posting Outside Date Range** fields on the **General** FastTab
 - The **Auto Fill Purchase Contract Details**, **Purchase Date Range Applies-to**, and **Auto Close Purchase Contracts** fields on the **Purchase** FastTab
 - The **Auto Fill Sales Contract Details**, **Sales Date Range Applies-to**, and **Auto Close Sales Contracts** fields on the **Sales** FastTab
- The global lot attribute fields have been added to the **Lines** FastTab of the **Sales Contract** and **Purchase Contract** pages.



- The following fields have been added to the **Purchase Contract** page.
 - Contract Qty. Received (Base)
 - Contract Qty. Invoice (Base)
 - Contract Qty. Returned (Base)
 - Contract Qty. Returned
 - Contract Qty. Credited (Base)
 - Contract Qty. Credited
- The following fields have been added to the **Sales Contract** page.
 - Contract Qty. Shipped (Base)
 - Contract Qty. Invoiced (Base)
 - Contract Qty. Credited (Base)
 - Contract Qty. Returned (Base)
- The **Applied Discount %** and **Applied Discount Unit of Measure Code** fields have been added to the **Purchase Contract** page. However, these fields are visible only when the Aptean [Advanced Pricing](#) extension is installed.
- The **Purchase Contract Nos.** and **Sales Contract Nos.** fields from the **Purchase & Payables Setup** and **Sales & Receivables Setup** pages have been moved to the **Contract Setup** page.
- The **Quote No.** field has been removed from the **Purchase Contract** page.



2403.6.0.0

Release Note • 10/24/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
237452	The system fails to create a purchase contract when the Salespers./Purch. Code field is filled on the User Setup page.



2403.5.0.0

Release Note • 9/13/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
222703	The system fails to transfer the unit price from the sales contract line when creating a sales order.



2403.4.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

The *OnBeforeGetTemporarySalesContractLines* and *OnBeforeConfirmMultipleContractsAndUpdateContractNoAndLineNo* integration events have been added to the *SalesContractManagement131FDW* codeunit to enhance customization within the Aptean Contract Management extension.



2403.3.0.0

Release Note • 7/25/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Contract Management extension, the *OnGetSalesApprovalDocumentType* event has been added within the *EnumAssignmentMgmtSubscr131FDW* codeunit to make it compatible with the Business Central 24.4 upgrade.



2403.2.0.0

Release Note • 7/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
205404	The system generates empty lines on the Sales Order page when items assigned from the Trading Board page are blocked. This issue occurs when the Enable Contract On Sales toggle on the Contract Setup page is turned on and the Aptean Trading Board extension is installed.



2403.1.0.0

Release Note • 6/28/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
207460	The sales order number series updates incorrectly when created from a sales contract, using the starting number instead of the last used number. This issue arises when the Allow Gaps in Nos. toggle is enabled for both the sales order and sales contract number series on the No. Series page.



2403.0.0.0

Release Note • 6/26/2024 • 1 min read

Enhancements/Modifications

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



2402.9.0.0

Release Note • 6/21/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
205399	An error occurs on the Posted Purchase Document Lines page upon executing the Get Posted Document Lines to Reverse action on the Purchase Return Order page, while filtering by document type to reverse posted receipts. This issue occurs specifically when the Aptean Packaging and Aptean Contract Management extensions are installed together.



2402.8.0.0

Release Note • 6/11/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
203309	The Original Order Qty. field value incorrectly updates to match the Contract Qty. field value upon reopening, adjusting, and re-releasing a sales contract.



2402.7.0.0

Release Note • 6/10/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
201991	A performance issue occurs on the Sales Order page, significantly delaying the creation of sales lines.



2402.6.0.0

Release Note • 5/29/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
206043	An error occurs upon executing the Preview Posting action as the preview is incompatible with the functionality of the Apteian Contract Management extension. This error occurs in the following pages: • Purchase Order • Purchase Invoice • Purchase Credit Memo • Purchase Return Order • Sales Order • Sales Invoice • Sales Credit Memo • Sales Return Order



2402.5.0.0

Release Note • 5/27/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
204101	While selecting the Show Document action on the Purchase Lines page, the Purchase List page opens instead of the Purchase Contract card page. This issue occurs on the Purchase Order , Purchase Invoice , Purchase Return Order , and Purchase Credit Memo documents.



2402.4.0.0

Release Note • 5/15/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
201277	Upon executing the Show Document action from the Sales Lines page accessed through the Contract No. field on the Sales Order page, the Sales List page opens instead of the Sales Contract page.



2402.3.0.0

Release Note • 5/13/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
201282	The Unit Price Excl. VAT field on the sales contract lines and the Direct Unit Cost Excl. VAT field on the purchase contract lines are editable despite the Allow Direct Sales Line Price Update and Allow Direct Purchase Line Cost Update toggles being turned off on the Advanced Pricing Setup page.
201403	The sales return order transferred through the Intercompany Inbox Transactions page does not include the location code from the corresponding purchase return order.
201594	The purchase and purchase return orders transferred through the Intercompany Inbox Transactions page do not include the location code from the corresponding sales and sales return orders.



2402.2.0.0

Release Note • 5/10/2024 • 1 min read

Enhancements/Modifications

With this release, the **Contract Setup** page allows you to activate contract management extensions for sales and purchase functionality. This enhancement addresses the performance issue reported in bug ID #204390.

Resolved issues

The following issue has been resolved in this release.

ID	Description
204390	A performance issue occurs when creating sales order lines from the Point of Sale (POS) system.

UI/UX changes

The **Contract Setup** page has been added in this release. For more information, see [Setup](#).



2402.1.0.0

Release Note • 5/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
200298	An error occurs upon executing the Create Warehouse Shipment action on a sales order created via the Intercompany Inbox Transactions page, as the Location Code and Sell-to Customer No. field values were updated incorrectly.



2402.0.0.0

Release Note • 4/17/2024 • 1 min read

Features

With the features added in this release of the Aptean Contract Management extension, you can:

- Create sales contracts
- Create sales orders based on sales contracts
- Configure alternate items for existing sales contracts
- Link alternate items to sales contracts
- Generate pricing statistics and sales contracts with a small remaining quantity reports

UI/UX changes

The **Remaining small quantities Tolerance allowance in %** field has been renamed as **Small Qty Tolerance %** on both the **Purchase Contract with Small Remaining Quantity** report and **Sales Contract with Small Remaining Quantity** report.



2401.0.0.0

Release Note • 2/26/2024 • 1 min read

Features

With the features added in this release of the Aptean Contract Management extension, you can:

- Create purchase contracts
- Create purchase orders based on purchase contracts
- Configure alternate items for existing contracts.
- Link alternate items to purchase contracts
- Generate reports on pricing statistics and purchase contract with a small remaining quantity

Integrations

The Aptean Contract Management extension utilizes the features of the following extensions:

- The Aptean [Advanced Pricing](#)
- The Aptean [Over Under Delivery](#).

For more information, see [Integrations](#)



Introduction

Article • 5/15/2024 • 1 min read

Introduction

The Aptean Contract Management extension works in conjunction with the established domain of procurement for both sales and purchases. The primary goal of this extension is to ensure the protection of involved businesses and establish the foundation of business deals.

In the context of this extension, businesses can now create and manage contracts specific to their suppliers, customers, outlining terms, conditions, and essential details. The contract covers crucial aspects like pricing, quality, quantity, and delivery schedules. It serves as a formal pact between the parties involved.

Furthermore, this extension aims to clarify responsibilities, rights, and risk allocation that fosters effective supplier relationships. Unlike sales or purchase orders, sales or purchase contracts are designed for long-term partnerships, ensuring consistent supplies and sales. The Aptean Contract Management extension enables businesses to form a stable, consistent, and mutually beneficial alliance.



Setup

Article • 7/31/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up contract management](#)
- [Set up number series for purchase contract](#)
- [Set up number series for sales contract](#)



Manage permission sets

Article • 7/30/2024 • 3 min read

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

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 *CONTRACTMGNTFDW*.

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 *CONTRACTMGNTBASICFDW*.

User-defined permission sets

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

Assign a permission set

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



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



Set up contract management

Article • 6/24/2026 • 2 min read

Contract setup allows you to activate contract management extensions for sales and purchase functionality. The following procedure outlines how to perform this activity.

- 1. Select the Search icon , enter **Contract Setup**, and choose then related link.
The **Contract Setup** page opens.

- 2. On the **General** FastTab, enter the required information in the following fields:

Field	Description
Allow Orders Outside Date Range	Specify whether the order can be created when the associated contract is outside the specified date range. The options are <i>Yes + Notification</i> and <i>No</i> .
Allow Posting Outside Date Range	Specify whether posting transactions are allowed when the associated contract is outside the specified date range. The options are <i>Yes + Notification</i> and <i>No</i> .

- 3. On the **Purchase** FastTab, enter the required information in the following fields:

Field	Description
Enable Contract On Purchase	Specify whether to enable the contract management extension purchase functionality.
Auto Fill Purchase Contract Details	Specify whether the details of the purchase contract are automatically inherited into purchase documents when the item number is entered. This toggle is turned off by default.



Purchase Date Range Applies-to	Specify the date range to consider when linking a purchase contract to a purchase document. The types of purchase document dates include: • Document Date • Order Date • Posting Date • Expected Receipt Date • Requested Receipt Date • Promised Receipt Date
Purchase Contract Nos.	Specify a code that the number series will use when it assigns a number to the purchase contract.
Auto Close Purchase Contracts	Specify a date formula value in conjunction with a job queue entry, after which the system automatically closes an expired contract. Select Job Queue > Auto Close Purchase Contracts after specifying a date formula to create an entry that will automatically close expired purchase contracts.
Exceed Purch. Contract Qty. Alert Type	Select how the system must notify you if the Qty. to Receive field value exceeds the Contract Qty. field value when creating a purchase order from a purchase contract. The available options are: • <i>Error</i>: The system displays an error message, preventing you from creating the purchase order. • <i>Warning</i>: The system displays a warning message, but you can proceed with creating the purchase order, if needed. Further, the system displays a warning message when releasing a purchase order linked to a purchase contract.
Retain Dates On Purchase Document	Turn on the toggle to retain the original dates on the purchase document when you assign a contract. When turned off, the dates on the purchase document are updated based on the dates defined on the purchase contract.

4. On the **Sales FastTab**, enter the required information in the following fields:

Field	Description
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Enable Contract On Sales	Specify whether to enable the contract management extension sales functionality.
Auto Fill Sales Contract Details	Specify whether the details of the sales contract are automatically inherited into sales documents when the item number is entered. This toggle is turned off by default.
Sales Date Range Applies-to	Specify the date range to consider when linking a sales contract to a purchase document. The types of sales document dates include: • Document Date • Order Date • Posting Date • Requested Receipt Date • Promised Receipt Date
Sales Contract Nos.	Specify a code that the number series will use when it assigns a number to the sales contract.
Auto Close Sales Contracts	Specify a date formula value in conjunction with a job queue entry, after which the system automatically closes an expired contract. Select Job Queue > Auto Close Sales Contracts after specifying a date formula to create an entry that will automatically close expired sales contracts.
Exceed Sales Contract Qty. Alert Type	Select how the system must notify you if the Qty. to Ship field value exceeds the Contract Qty. field value when creating a sales order from a sales contract. The available options are: • <i>Error</i>: The system displays an error message, preventing you from creating the sales order. • <i>Warning</i>: The system displays a warning message. You can proceed to create the sales order as needed. Further, the system displays a warning message when releasing a sales order linked to a sales contract.
Retain Dates On Sales Document	Turn on the toggle to retain the original dates on the sales document when you assign a contract.



 Note

- When creating the order, the system validates and proceeds based on the **Allow Orders Outside Date Range** field value.
- When posting the order, the system validates and proceeds based on the **Allow Posting Outside Date Range** field value.
- You are allowed to change the order and posting date range.
- For the **Exceed Purch. Contract Qty. Alert Type** and **Exceed Sales Contract Qty. Alert Type** fields, if the Aptean [Over Under Delivery](#) extension is installed and an over-receipt code is set up, the system allows receiving additional quantities, as defined in the over-receipt code. In this case, the system displays error or warning messages based on the configured alert type when the receiving quantity exceeds the over-receipt allowance.



Manage purchase contracts

Article • 5/27/2026 • 3 min read

You can create, view, and edit contracts on the **Purchase Contracts** page. The following procedures describe how to perform this activity.

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

Field	Description
No.	Specifies the number of the involved entries or records according to the specified number series defined on the Purchases & Payables Setup. The system won't allow you to create a purchase contract if the number series hasn't been defined.
Vendor No.	Specifies the number of the vendor who delivers the products.
Vendor Name	Specifies the name of the vendor who delivers the products.
Address	Specifies the address of the vendor who ships the items.
Address 2	Specifies additional address information of the vendor.
City	Specifies the city of the vendor who ships the items.
Post Code	Specifies the postal code of the vendor's address.
Country/Region	Specifies the country or region of the defined address.
Contact No.	Specifies the number of your contact at the vendor.
Phone No.	Specifies the telephone number of the person to contact about an order from this vendor.
Mobile Phone No.	Specifies the mobile telephone number of the person to contact about an order from this vendor.
Email	Specifies the email address of the person to contact about an order from this vendor.



Contact	Specifies the name of the person to contact about the shipment of the item from this vendor.
Document Date	Specifies the date when the related document was created.
Document Type	Specifies the type of document that is being created.
Posting Date	Specifies the date when the posting of the purchase document will be recorded.
Due Date	Specifies the date when the related sales invoice must be paid.
Vendor Invoice No.	Specifies the document number of the original document you received from the vendor. You can require the document number for posting or leave it optional. By default, it's required, so that this document references the original. Making document numbers optional removes a step from the posting process. For example, if you attach the original invoice as a PDF, you might not need to enter the document number. To specify whether document numbers are required, on the Purchases & Payables Setup page, select or clear the Ext. Doc. No. Mandatory field.
Your Reference	Specifies the vendor's reference.
Purchaser Code	Specifies the code to define the purchaser that is assigned to the vendor.
No. of Archived Versions	Specifies the number of archived versions for this document.
Order Date	Specifies the date when the associated purchase order was created.
Contract Start Date	Specifies the start date of the contract defined by the user. This should always be defined before the end date otherwise, the system will fail to register the time range.
Contract End Date	Specifies the end date of the contract. This defines the validity of the purchase contract. After the defined time range, the purchase contract is invalid, and you won't be allowed to create a new purchase order/line based on the contract.
Contract Quantity	Specifies the cumulative quantity of all the line items. By selecting the quantity, you can access a comprehensive summary of all line items on the purchase contract page.
Vendor Order No.	Specifies the vendor's order number.
Vendor Shipment No.	Specifies the vendor's shipment number.
Responsibility Center	Specifies the code of the responsibility center, such as a distribution hub, that is associated with the involved user, company, customer, or vendor.



Assigned User ID	Specifies the ID of the user responsible for the document.
Status	Specifies whether the record is open, waiting to be approved, invoiced for prepayment, or released to the next stage of processing.
Contract Closed	Specifies whether the contract is closed. This is a read-only field and depends on the state of the contract closed checkbox on the Lines FastTab. To enable this, you must select the contract closed checkboxes for all the line items. You cannot add/delete line items when the contract is closed.
Subtotal Excl. VAT(GBP)	Specifies the sum of the value in the Line Amount Excl. VAT field on all lines in the document.
Inv. Discount Amount (GBP)	Specifies a discount amount deducted from the value of the Total Incl. VAT field, based on purchase lines where the Allow Invoice Disc. field is selected. You can enter or change the amount manually.
Invoice Discount %	Specifies a discount percentage that is applied to the invoice based on purchase lines where the Allow Invoice Disc. field is selected. The percentage and criteria are defined on the Vendor Invoice Discounts page, but you can enter or change the percentage manually.
Total Excl. VAT(GBP)	Specifies the sum of the value in the Line Amount Excl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.
Total VAT (GBP)	Specifies the sum of VAT amounts on all lines in the document.
Total Incl. VAT (GBP)	Specifies the sum of the value in the Line Amount Incl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.

 Note

If you haven't defined the **Purchase Contract Nos.** on the **Purchase** FastTab of the **Contract Setup** page, the system won't allow you to create a purchase contract. To know more, see [Set up contract management](#).

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

Field	Description
Type	Specifies the type of transaction that will be posted with the document line. If you select <i>Comment</i> then you can enter any text in the



	Description field, such as a message to a customer.
No.	Specifies what you buy, such as a product or a fixed asset. You'll see different lists of things to choose from depending on your choice in the Type field.
Item Reference No.	Specifies the referenced item number.
Contract Closed	Specifies whether the contract is closed for the defined line item.
Applied Direct Unit Cost	Specifies the direct unit cost from the applied purchase price for this line. If this value is changed, it will simulate as if the manual price is used from the Applied Purchase Price and Discount page.
Applied Price Unit of Measure Code	Specifies the applied unit of measure code assigned for the Applied Purchase Price field for the specified line.
Applied Discount %	Specifies the discount from the applied purchase price for this line. If this value is changed, it will simulate as if the manual price is used from the Applied Purchase Price and Discount page.
Applied Discount Unit of Measure Code	Specifies the applied unit of measure code assigned for the Applied Purchase Discount field for the specified line.
Description	Describes what is being purchased. The suggested text comes from the item itself. You can change it to suit your needs for this document. If you change it here, the source of the text will not change. If the line's Type field is set to Comment, you can use this field to write the comment and leave the other fields empty.
Contract Alternate Item Exists	Specifies whether an alternate item has been defined for the item selected on the purchase contract.
Global Lot Attributes	Specifies the global lot attributes assigned to the item on the Advanced Attributes Setup page. You can view only the attributes with assigned values, even though you can set up to eight attribute values. These fields are visible only when the Aptean Advanced Attributes extension is integrated with the Aptean Contract Management extension.
Location Code	Specifies a code for the location where you want the items to be placed when they are received.
Bin Code	Specifies the bin where the items are picked or put away.
Contract Qty	Specifies the quantity of the defined item. The number is based on the unit chosen in the Unit of Measure Code field.



Contract Qty (Base)	Specifies the quantity of the defined item. The number is based on the unit chosen in the Unit of Measure Code field.
Contract Qty on Orders	Specifies the contract quantity defined in the order.
Contract Qty on Orders (Base)	Specifies the contract quantity defined in the order expressed in base units of measure.
Contract Qty Received	Specifies how many units of the item on the line have been posted as received.
Contract Qty Received (Base)	Specifies how many units of the item on the line, in the base unit of measure, have been posted as received.
Contract Qty Invoiced	Specifies how many units of the item on the line have been posted as invoiced.
Contract Qty Invoiced (Base)	Specifies how many units of the item on the line, in base unit of measure, have been posted as invoiced.
Contract Qty Returned	Specifies how many units of items on the line have been returned.
Contract Qty Returned (Base)	Specifies how many units of items on the line, in base unit of measure, have been returned.
Contract Qty Credited	Specifies the quantity on the contract line that has credit transactions.
Contract Qty Credited (Base)	Specifies the quantity on the contract line, in the base unit of measure, have credit transactions.
Contract Qty Outstanding	Specifies how many units of the item on the contract line have been posted as outstanding. This value is defined using the formula (Contract Qty – Qty. on open purchase order line - Qty received and invoiced + Qty. on posted purchase returns line and purchase credit memo line).
Contract Qty On Open Purchase Documents (Base)	Specifies the total quantity, in base units of measure, from open Purchase Orders and Purchase Invoices linked to the selected contract



	line. Selecting the field opens the Purchase Lines page filtered to these document types only.
Contract Qty On Open Purchase Return Documents (Base)	Specifies the total quantity, in base units of measure, from open Purchase Return Orders and Purchase Credit Memos linked to the selected contract line. Selecting the field opens the Purchase Lines page filtered to these document types only.
Contract Qty Remaining	Specifies the remaining quantity on the contract line, calculated as the Contract Qty minus the Contract Qty On Open Purchase Documents (Base) , plus the Contract Qty On Open Purchase Return Documents (Base) . Purchase documents can only be created within this remaining quantity. If the quantity exceeds the limit, the system displays a warning message.
Reserved Quantity	Specifies how many item units on this line have been reserved.
Unit of Measure Code	Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
Direct Unit Cost Excl. VAT	Specifies the price of one unit of what you are buying.
Tax Area Code	Specifies the tax group that is used to calculate and post sales tax.
Tax Group Code	Specifies the tax group that is used to calculate and post sales tax.
Line Amount Excl. VAT	Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.
Qty. to Receive	Enter the quantity of items that remains to be received. If this field value exceeds the Contract Qty. field value, the system displays an error or a warning message when creating a purchase order from the purchase contract based on the setup. For



	more information, see Set up contract management .
Quantity Received	Specifies how many units of the item on the line have been posted as received.
Qty. to Invoice	Specifies the quantity that remains to be invoiced. It is calculated as Quantity - Qty. Invoiced.
Qty. to Assign	Specifies how many units of the item on the line have been posted as invoiced.
Item Charge Qty. to Handle	Specifies how many items the item charge will be assigned to on the line. It can be either equal to Qty. to Assign or to zero. If it is zero, the item charge will not be assigned to the line.
Qty. Assigned	Specifies how much of the item charge that has been assigned.
Promised Receipt Date	Specifies the date that the vendor has promised to deliver the order.
Planned Receipt Date	Specifies the date when the item is planned to arrive in inventory. Forward calculation: planned receipt date = order date + vendor lead time (per the vendor calendar and rounded to the next working day in first the vendor calendar and then the location calendar). If no vendor calendar exists, then the planned receipt date = order date + vendor lead time (per the location calendar). Backward calculation: order date = planned receipt date - vendor lead time (per the vendor calendar and rounded to the previous working day in first the vendor calendar and then the location calendar). If no vendor calendar exists, then the order date = planned receipt date - vendor lead time (per the location calendar).
Expected Receipt Date	Specifies the date you expect the items to be available in your warehouse. If you leave the field blank, the expected receipt date will be calculated as the sum of the Planned Receipt Date , Safety Lead Time , and Inbound Warehouse Handling Time fields.
Contract Start Date	Specifies the start date of the contract defined by the user on the General FastTab .
Contract End Date	Specifies the end date of the contract defined by the user on the General FastTab.
Over-Receipt Quantity	Specifies the amount by which the received quantity exceeds the expected quantity. This helps track any surplus or additional items received beyond what was originally anticipated.
Over-Receipt Code	Specifies a code relevant to the amount by which the received quantity exceeds the expected quantity.



 Note

The Applied Direct Unit Cost, Applied Price Unit of Measure Code, Applied Discount %, and Applied Discount Unit of Measure Code fields are visible only when the Aptean [Advanced Pricing](#) extension is integrated with the Aptean Contract Management extension.

5. On the **Lines** FastTab, select **Line > Unposted Lines** to view unposted line items linked to various documents associated with the defined purchase contract.

You can also view the posted line items by selecting **Line > Posted Lines** and then selecting the desired document.

 Note

You cannot add line items without defining the **Contract Start Date** and **Contract End Date** fields on the **General** FastTab.

6. On the **Invoice Details** FastTab, enter the required information in the following fields:

Field	Description
Currency Code	Specifies the currency of amounts on the purchase document.
Expected Receipt Date	Specifies the date you expect the items to be available in your warehouse. If you leave the field blank, the expected receipt date will be calculated as the sum of the Planned Receipt Date , Safety Lead Time , and Inbound Warehouse Handling Time fields.
Prices Including VAT	Specifies if the Unit Price and Line Amount fields on document lines should be shown with or without VAT.
VAT Bus. Posting Group	Specifies the VAT specification of the involved customer or vendor to link transactions made for this record with the appropriate general ledger account according to the VAT posting setup.
Vendor Posting Group	Specifies the vendor's market type to link business transactions to.
Payment Terms Code	Specifies a formula that calculates the payment due date, payment discount date, and payment discount amount.
Payment Method Code	Specifies the code to define the method of payment, such as with bank transfer, cash, or check.



Shortcut Dimension 1 Code	Specifies the code for Shortcut Dimension 1, which is one of two global dimension codes that you set up on the General Ledger Setup page.
Shortcut Dimension 2 Code	Specifies the code for Shortcut Dimension 2, which is one of two global dimension codes that you set up on the General Ledger Setup page.
Payment Discount %	Specifies the payment discount percent granted if payment is made on or before the date in the Pmt. Discount Date field.
Pmt. Discount Date	Specifies the date on which the amount in the entry must be paid for a payment discount to be granted.
Journal Template Name	Specifies the name of the journal template in which the purchase header is to be posted.
Tax Liabe	Specifies if this vendor charges you sales tax for purchases.
Tax Area Code	Specifies the tax area code used for this purchase to calculate and post sales tax.
Shipment Method Code	Specifies the delivery conditions of the related shipment, such as free on board (FOB).
Payment Reference	Specifies the payment of the purchase invoice.
Creditor No.	Specifies the number of the vendor.
On Hold	Specifies that the related entry represents an unpaid invoice for which either a payment suggestion, a reminder, or a finance charge memo exists.
Inbound Whse. Handling Time	Specifies the time it takes to make items part of available inventory, after the items have been posted as received.
Lead Time Calculation	Specifies a date formula for the time it takes to replenish the item.
Requested Receipt Date	Specifies the date that you want the vendor to deliver to the ship-to address.
Promised Receipt Date	Specifies the date that the vendor has promised to deliver the order.

7. On the **Shipping and Payment** FastTab, enter the required information in the following fields:

Field	Description
Ship-to	Specifies the address that the products on the purchase document are shipped to. <i>Default (Company Address)</i> : The same as the company address specified on the Company Information page. Location: One of the company's location addresses. Customer Address:



	Used in connection with drop shipment. Custom Address: Any ship-to address that you specify in the fields below.
Name	Specifies the name of the company at the address that you want the items on the purchase document to be shipped to.
Address	Specifies the address that you want the items on the purchase document to be shipped to.
Address 2	Specifies additional address information.
City	Specifies the city of the vendor on the purchase document.
Country	Specifies the state, province, or county of the address.
Post Code	Specifies the postal code of the address that you want the items on the purchase document to be shipped to.
Country/Region	Specifies the name of a contact person for the address that you want the items on the purchase document to be shipped to.
Contact	Specifies the name of a contact person for the address that you want the items on the purchase document to be shipped to.
Pay-to	Specifies the vendor to whom the purchase document will be paid. <i>Default (Vendor):</i> The same as the vendor on the purchase document. <i>Another Vendor:</i> Any vendor that you specify in the fields below.
Remit-to Code	Specifies the code for the vendor's remit address for this order.

8. On the **Foreign Trade** FastTab, enter the required information in the following fields:

Field	Description
Transaction Specification	Specifies a specification of the document's transaction for the purpose of reporting to INTRASTAT.
Transaction Type	Specifies the type of transaction that the document represents for the purpose of reporting to INTRASTAT.
Transport Method	Specifies the transport method for the purpose of reporting to INTRASTAT.
Entry Point	Specifies the code of the port of entry where the items pass into your country/region for reporting to Intrastat.
Area	Specifies the destination country or region for the purpose of Intrastat reporting.

9. On the **Commodity Harvest Planning** FastTab, enter the required information in the following fields:



Field	Description
Harvest Order No.	Specifies the harvest order number.
Agriculture Location No.	Enter the relevant number of agricultural locations linked to the harvest order.
Agriculture Location Description	Specifies the description of the agricultural location linked to the harvest order.
Grower No.	Specifies the grower number to which the harvest order is linked.
Grower Name	Specifies the name of the grower to which the harvest order is linked.
Farm No.	Specifies the farm number.
Farm Description	Specifies the description of the farm.
Season No.	Specifies the season number.
Season Start Date	Specifies the starting date of the season.
Season End Date	Specifies the ending date of the season.

Alternatively, you can create a new purchase contract using the **Copy Document** action.

10. On the **Purchase Contract** page, on the action bar, select **Process > Functions > Copy Document**.

The **Copy Purchase Document** page opens.

11. In the **Document Type** field, select *Contract*.

12. Enter **Document No.**

13. Click **OK**.

The purchase contract is created.

You can also create a purchase order directly from the defined purchase contract. For more information, see [Create purchase order associated with the purchase contract](#).

You can also create a purchase contract directly from the **Vendor Card** page. On the action bar, select **Actions > New Document > Purchase Contract**. The **Purchase Contract** page opens with the vendor number automatically filled in.



Manage sales contracts

Article • 5/27/2026 • 3 min read

A sales contract is a legally binding agreement between a buyer and a seller, defining the terms and conditions of a transaction. It specifies the goods or services sold, price, payment terms, delivery terms, warranties, and other relevant provisions. Sales contracts help businesses formalize agreements, minimize disputes, and establish a legal framework, fostering trust and accountability in business relationships. With this feature you can create, view, and edit sales contracts. The following procedure describes how to perform this activity.

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

Field	Description
No.	Specifies the number of the involved entry or record, according to the specified number series.
Customer No.	Specifies the number of the customer who will receive the products and be billed by default.
Customer Name	Specifies the name of the customer who will receive the products and be billed by default.
Address	Specifies the address where the customer is located.
Address 2	Specifies the additional address information.
City	Specifies the city of the customer on the sales document.
Post Code	Specifies the postal code.
Country/Region Code	Specifies the country or region of the address.
Contact No.	Specifies the number of the contact person that the sales document will be sent to.
Phone No.	Specifies the telephone number of the contact person that the sales document will be sent to.
Mobile Phone No.	Specifies the mobile telephone number of the contact person that the sales document will be sent to.



Email	Specifies the email address of the contact person that the sales document will be sent to.
Contact	Specifies the primary contact person's name at the customer's organization.
No. of Archived Versions	Specifies the number of archived versions for this document.
Document Date	Specifies the date when the related document was created.
Document Type	Specifies the type of document that is being created.
Posting Date	Specifies the date when the posting of the sales document will be recorded.
Order Date	Specifies the date the order was created. The order date is also used to determine the prices and discounts on the document.
Contract Start Date	Specifies the start date of contract defined by the user. This should always be defined before the end date, otherwise the system will fail to register the time range.
Contract End Date	Specifies the end date of the contract. This defines the validity of the sales contract. After the defined time range, the sales contract is invalid, and you won't be allowed to create a new Sales order/line based on the contract.
Contract Quantity	Specifies the cumulative quantity of all the line items. By selecting the quantity, you can access a comprehensive summary of all line items on the Sales contract page.
Due Date	Specifies when the related sales invoice must be paid.
Requested Delivery Date	Specifies the date that the customer has asked for the order to be delivered.
Promised Delivery Date	Specifies the date promised for order delivery as a result of the order promising function.
External Document No.	Specifies a document number that refers to the customer's or vendor's numbering system.
Your Reference	Specifies the customer's reference for inclusion on sales documents.
Salesperson Code	Specifies the code of the salesperson assigned to the customer.
Campaign No.	Specifies the number of the campaign that the document is linked to.
Opportunity No.	Specifies the number of the opportunity that the sales quote is assigned to.
Responsibility Center	Specifies the code of the responsibility center, such as a distribution hub, that is associated with the involved user, company, customer, or vendor.



Assigned User ID	Specifies the ID of the user who is responsible for the document.
Status	Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.
Contract Closed	Specifies whether the contract is closed. This is a read-only field and depends on the state of the contract closed checkbox on the Lines FastTab. To enable this, you must select the contract closed checkboxes for all the line items. You cannot add/delete line items when the contract is closed.
Use Contract Ship-to Address	Specifies whether the Ship-to Address configured in the defined contract should be used for the associated sales order. When turned off, the sales orders inherit the Ship-to Address from the associated customer card.

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

Field	Description
Type	Specifies the type of transaction that will be posted with the document line. If you select Comment, then you can enter any text in the Description field, such as a message to a customer.
No.	Specifies what you are selling, such as a product or a fixed asset. You'll see different lists of things to choose from depending on your choice in the Type field.
Item Reference No.	Specifies a reference to the item number as defined by the vendor or customer, or the item's barcode.
Contract Closed	Specifies whether the contract is closed for the defined line item.
Description	Specifies a description of the item or service on the line.
Contract Alternate Item Exists**	Specifies if alternate items are configured for the items defined in the contract.
Location Code	Specifies the inventory location from which the items sold should be picked and where the inventory decrease is registered.



Global Lot Attributes	Specifies the global lot attributes assigned to the item on the Advanced Attributes Setup page. You can view only the attributes with assigned values, even though you can set up to eight attribute values. These fields are visible only when the Aptean Advanced Attributes extension is integrated with the Aptean Contract Management extension.
Contract Qty.	Specifies the quantity of the sales order line.
Qty. to Assemble to Order	Specifies how many units of the blanket sales line quantity that you want to supply by assembly.
Reserved Quantity	Specifies how many units of the item on the line have been reserved.
Unit of Measure Code	Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inherited.
Contract Start Date	Specifies the start date of contract defined by the user. This should always be defined before the end date, otherwise the system will fail to register the time range.
Contract End Date	Specifies the end date of the contract. This defines the validity of the sales contract. After the defined time range, the sales contract is invalid, and you won't be allowed to create a new Sales order/line based on the contract.
Applied Unit Price	Specifies the direct unit price extracted from the Applied Sales Price for this line. Altering this value will simulate the application of the Manual Price from the Applied Sales Price and Discount page.
Applied Price Unit of Measure Code	Specifies the unit of measure code retrieved from the Applied Sales Price for this line. Altering this value will simulate the application of the Manual Price from the Applied Sales Price and Discount page.
Applied Discount Value	Specifies the discount value applied from the Applied Sales Discount for this line. Altering this value will simulate the use of Manual Discount from the Applied Sales Price and Discount page.
Applied Discount Unit of Measure Code	Specifies the applied unit of measure code assigned for the Applied Sales Discount field for the specified line.
Unit Price Excl. Tax	Specifies the price for one unit on the sales line.
Tax Area Code	Specifies the tax area that is used to calculate and post sales tax.



Tax Group Code	Specifies the tax group code for the tax-detail entry.
Line Discount %	Specifies the discount percentage that is granted for the item on the line.
Line Amount Excl. VAT	Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.
Contract Qty. Shipped	Specifies how many units of the item on the line have been posted as shipped.
Contract Qty. Shipped (Base)	Specifies how many units of the item on the line, in base unit of measure, have been posted as shipped.
Contract Qty. Invoiced	Specifies how many units of the item on the line have been posted as invoiced.
Contract Qty. Invoiced (Base)	Specifies how many units of the item on the line, in base unit of measure, have been posted as invoiced.
Contract Qty. Returned	Specifies how many units of the item on the line have been posted as returned.
Contract Qty. Returned (Base)	Specifies how many units of the item on the line, in base unit of measure, have been posted as returned.
Contract Qty. Credited	Specifies how many units of the item on the line have been posted as credited.
Contract Qty. Credited (Base)	Specifies how many units of the item on the line, in base unit of measure, have been posted as credited.
Contract Qty. Outstanding	Specifies how many units of the item on the contract line have been posted as outstanding. This value is defined using the formula (Contract Qty – Qty. on open purchase order line - Qty received and invoiced + Qty. on posted purchase returns line and purchase credit memo line).
Contract Qty On Open Sales Documents (Base)	Specifies the total quantity, in base units of measure, from open Sales Orders and Sales Invoices linked to the selected contract line. Selecting the field opens the Sales Lines page filtered to these document types only.



Contract Qty On Open Sales Return Documents (Base)	Specifies the total quantity, in base units of measure, from open Sales Return Orders and Sales Credit Memos linked to the selected contract line. Selecting the field opens the Sales Lines page filtered to these document types only.
Contract Qty Remaining	Specifies the remaining quantity on the contract line, calculated as the Contract Qty minus the Contract Qty On Open Sales Documents (Base) , plus the Contract Qty On Open Sales Return Documents (Base) . Sales documents can only be created within this remaining quantity. If the quantity exceeds the limit, the system displays a warning message.
Contract Qty. On Order	Specifies the contract quantity defined in the order.
Contract Qty. On Order (Base)	Specifies the contract quantity defined in the order expressed in base units of measure.
Contract Qty. Remaining	Specifies the remaining contract quantity that needs to be processed.
Qty. to Ship	Enter the quantity of items that remain to be shipped. If this field value exceeds the Contract Qty. field value, the system displays an error or a warning message when creating a sales order from the sales contract based on the setup. For more information, see Set up contract management. If the Aptean Over Under Delivery extension is installed and an over-receipt code is set up, the system allows receiving additional quantities, as defined on the over-receipt code. In this case, the system displays an error or a warning message based on the configured alert type when the receiving quantity exceeds the over-receipt allowance.
Quantity Shipped	Specifies how many units of the item on the line have been posted as shipped.
Qty. to Invoice	Specifies the quantity that remains to be invoiced. It is calculated as Quantity - Quantity Invoiced.



Quantity Invoiced	Specifies how many units of the item on the line have been posted as invoiced.
Qty. to Assign	Specifies how many units of the item charge will be assigned to the line.
Item Charge Qty. to Handle	Specifies the quantity of items to which the charge will be assigned on the line. It can be either equal to Qty. to Assign or zero. If it is zero, the item charge will not be assigned to the line.
Qty. Assigned	Specifies the quantity of the item charge that was assigned to a specified item when you posted this sales line.
Planned Delivery Date	Specifies the planned date that the shipment will be delivered to the customer's address. If the customer requests a delivery date, the system calculates whether the items will be available for delivery on this date. If the items are available, the planned delivery date will be the same as the requested delivery date. If not, the system calculates the date that the items are available for delivery and enters this date in the Planned Delivery Date field.
Planned Shipment Date	Specifies the date on which the shipment is scheduled to depart from the warehouse. If the customer requests a delivery date, the system calculates the planned shipment date by subtracting the shipping time from the requested delivery date. If the customer does not request a delivery date or the requested delivery date cannot be met, the system calculates the content of this field by adding the shipment time to the shipping date.
Shipment Date	Specifies when items on the document are shipped or were shipped. A shipment date is usually calculated from a requested delivery date plus lead time.
Subtotal Excl. VAT(GBP)	Specifies the sum of the value in the Line Amount Excl. VAT field on all lines in the document.
Inv. Discount Amount Excl. VAT (GBP)	Specifies a discount amount that is deducted from the value of the Total Incl. VAT field, based on sales lines where the Allow Invoice Disc. field is selected. You can enter or change the amount manually.
Invoice Discount %	Specifies a discount percentage that is applied to the invoice, based on sales lines where the Allow Invoice Disc. field is selected. The percentage and criteria are defined on the Customer Invoice Discounts page, but you can enter or change the percentage manually.



Total Excl. VAT (GBP)	Specifies the sum of the value in the Line Amount Excl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.
Total VAT (GBP)	Specifies the sum of VAT amounts on all lines in the document.
Total Incl. VAT (GBP)	Specifies the sum of the value in the Line Amount Incl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.

 Note

The **Applied Unit Price**, **Applied Price Unit of Measure Code**, **Applied Discount Value**, and **Applied Discount Unit of Measure Code** fields are visible only when the Aptean [Advanced Pricing](#) extension is integrated with the Aptean Contract Management extension.

5. On the **Lines** FastTab, select **Manage > Related Sales Documents**.

The **Related Sales Contract Documents** page opens.

You can obtain a comprehensive overview of the sales documents linked to the selected line item, including sales-related information such as related sales orders, posted sales shipments, posted sales invoices, and posted sales return receipts.

6. Select the **Lot Attribute Requirements** action to view the lot attributes that are assigned to the item that is selected.

7. On the **Invoice Details** FastTab, enter the required information in the following fields:

Field	Description
Currency Code	Specifies the currency of amounts on the sales document.
Company Bank Account Code	Specifies the code for your company's bank account. Used for internal tracking and transactions.
Prices Including VAT	Specifies if the Unit Price and Line Amount fields on document lines should be shown with or without VAT.
VAT Bus. Posting Group	Specifies the VAT specification of the involved customer or vendor to link transactions made for this record with the appropriate general ledger account according to the VAT posting setup.
Customer Posting Group	Specifies the customer's market type to link business transactions to.
Payment Terms Code	Specifies the code defining payment schedule terms, including due dates, early payment discounts, and late penalties, streamlining financial processes.
EU 3-Party Trade	Specifies if the transaction is related to trade with a third party within the EU.



Shortcut Dimension 1 Code	Specifies the code for Shortcut Dimension 1, which is one of two global dimension codes that you set up on the General Ledger Setup page.
Shortcut Dimension 2 Code	Specifies the code for Shortcut Dimension 2, which is one of two global dimension codes that you set up on the General Ledger Setup page.
Payment Discount %	Specifies the payment discount percentage granted if the customer pays on or before the date entered in the Pmt. Discount Date field.
Pmt. Discount Date	Specifies the date on which the amount in the entry must be paid for a payment discount to be granted.
Direct Debit Mandate ID	Specifies the direct-debit mandate that the customer has signed to allow direct debit collection of payments.

8. On the **Shipping and Billing** FastTab, enter the required information in the following fields:

Field	Description
Ship- to	Specifies the address that the products on the sales document are shipped to. <i>Default (Sell-to Address):</i> The same as the customer's sell-to address. <i>Alternate Ship-to Address:</i> One of the customer's alternate ship-to addresses. <i>Custom Address:</i> Any ship-to address that you specify in the relevant fields.
Contact	Specifies the name of the contact person at the address to which products on the sales document will be shipped.
Code	Specifies how items on the sales document are shipped to the customer.
Agent	Specifies which shipping agent is used to transport the items to the customer on the sales document.
Agent Service	Specifies the code that represents the default shipping agent service you are using for this sales order.
Package Tracking No.**	Specifies the unique identifier assigned for each package, facilitating precise monitoring from sender to recipient. Employ this code to track your package's real-time progress and location.
Bill-to	Specifies the customer that the sales invoice will be sent to. <i>Default (Customer):</i> The same as the customer on the sales invoice. <i>Another Customer:</i> Any customer that you specify in the relevant fields.
Location Code	Specifies the location from where inventory items shipped on the sales document are to be shipped to the customer by default.



Shipment Date	Specifies when items on the document are shipped or were shipped. A shipment date is usually calculated from a requested delivery date plus lead time.
Shipping Advice	Specifies if the customer accepts partial shipment of orders.
Outbound Whse. Handling Time	Specifies a date formula for the time it takes to prepare items for shipping from this location. The time element is used in calculating the delivery date as follows: Shipment Date + Outbound Warehouse Handling Time = Planned Shipment Date + Shipping Time = Planned Delivery Date.
Shipping Time	Specifies the duration from when the items are shipped from the warehouse to when they are delivered.
Late Order Shipping	Specifies a delay in the shipment of one or more lines, or that the shipment date is either the same or earlier than the work date.
Combine Shipments	Specifies whether the order will be included upon using the Combine Shipments action.
Completely Shipped	Specifies whether all the items on the order have been shipped or, in the case of inbound items, completely received.

You can also create a purchase contract directly from the **Customer Card** page. On the action bar, select **Actions** > **New Document** > **Sales Contract**. The **Sales Contract** page opens with the customer number automatically filled in.



Create a purchase contract from harvest order and harvest planning pages

Article • 11/28/2024 • 5 min read

Creating a purchase contract from a harvest order or harvest planning page streamlines procurement, reduces errors, and enhances visibility. This efficiency improves resource management, controls costs, and fosters better supplier relationships.

Note

This functionality is available only when the Aptean [Commodity Harvest Planning](#) extension is integrated in conjunction with the Aptean Contract Management extension.

The following procedure describes how to perform this activity from the **Harvest Order** page. 1. Select the Search icon , enter **Harvest Orders**, and then choose the related link.

The **Harvest Orders** list page opens. 2. Create a harvest order. For more information, see [Harvest Orders](#). 3. On the **Lines** FastTab, on the action bar, select **Purchase > Create Purchase Contract** to create a purchase contract for a selected line of the harvest order.

Or, on the **Harvest Order** page, on the action bar, select **Purchase > Create Purchase Contract** to create a purchase contract for all lines of the harvest order.

The **Create Purchase Contract** page opens. 4. The **Contract Start Date** field gets inherited with the values from the **Season Start Date** field on the **Harvest Order** page. However, this is an editable field, and you can manually select a date. The contract starts on this date. 5. In the **Contract End Date** field, select a date from the displayed calendar. This is the date that the contract will expire. 6. Click **OK**. The purchase contract is created.

The created purchase contract line contains the global lot attribute values of the item selected on the harvest order. The line also reflects the value of the **Qty. to Harvest** field on the harvest order line in the **Contract Qty** field.

Note

The harvest order line shows the total quantity of unposted purchase contracts in the **Open Qty. in Purchase Contract** field.

The **No. of Open Purchase Contracts** field in the FactBox displays the total number of purchase contracts linked to the harvest order.

After creating a purchase contract from the harvest order, you can create a purchase order from the contract. For more information, see [Create purchase order associated with the purchase contract](#).

The following procedure describes how to perform this activity from the **Harvest Planning** page. 1. Select the Search icon , enter **Harvest Planning**, and then choose the related link.

The **Harvest Planning** list page opens. 2. On the action bar, Select **Purchase > Create Purchase Contract** to create a



purchase contract for the selected line(s) of the harvest planning.

The **Create Purchase Contract** page opens. 3. The **Contract Start Date** field gets inherited with the values from the **Season Start Date** field on the **Harvest Order** page. However, this is an editable field, and you can manually select a date. The contract starts on this date. 4. In the **Contract End Date** field, select a date from the displayed calendar. This is the date that the contract will expire. 5. Click **OK**.

The purchase contract is created.

Note

If multiple lines on the harvest planning page have been selected with different values in the **Season No.** and **Vendor No. (Pay to)** fields, the system generates multiple purchase contracts based on similar records. The created purchase contract line contains the global lot attribute values of the item selected on the harvest order. The line also reflects the value of the **Qty. to Harvest** field on the harvest order line in the **Contract Qty** field.



Assign a purchase contract to a purchase order

Article • 6/4/2025 • 2 min read

Assigning relevant purchase contracts to orders improves traceability, communication, compliance, and accountability. This approach reduces time and costs while aiding data analysis for well-informed decision-making. With this feature, you can assign single or multiple purchase contracts to the associated purchase orders. The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Purchase Orders**, and then choose the related link.
The **Purchase Orders** list page opens.
2. On the action bar, select **New**.
The **Purchase Order** card page opens.
3. On the **General** FastTab, enter **Vendor No.**, **Vendor Name**, and **Vendor Invoice No.**
4. On the **Lines** FastTab, enter **Type**, **Item No.**, and **Quantity**.
5. The system updates the **Contract No.** and **Contract Line No.** fields based on the value of the **Auto Fill Purchase Contract Details** toggle on the **Contract Setup** page. If the toggle is turned on, the values get auto-filled for purchase order and purchase invoice, otherwise, you can select them from the lookup table.

Note

The **Auto Fill Purchase Contract Details** toggle value is not applicable for the **Purchase Return Order** and **Purchase Credit Memo** pages.

Additionally, the **Contract Exist** checkbox on the **Lines** FastTab is automatically selected.

6. On the action bar, select **Home** > **Release** > **Release**.
The purchase order is released.

Note

- When releasing/posting a purchase order without assigning the corresponding purchase contract, the system displays a message notifying the presence of the purchase contract.
- The system displays a warning message when the receiving quantity exceeds the contract quantity when releasing a purchase order linked to a purchase contract and the **Exceed Purch. Contract Qty. Alert Type** field value is set to *Warning* on the **Contract Setup** page. For more information, see [Set up contract management](#).



Assign a sales contract to a sales order

Article • 6/4/2025 • 3 min read

Assigning sales contracts to sales orders streamlines the fulfillment process by aligning sales commitments with specific orders, ensuring accuracy and timely delivery. This integration enhances efficiency, minimizes errors, and fosters better customer relationships through seamless execution of sales agreements.

With this feature, you can assign single or multiple sales contracts to the associated sales orders. The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
The **Sales Orders** list page opens.
2. On the action bar, select **New**.
The **Sales Order** card page opens.
3. On the **General** FastTab, enter **Customer Name**.
4. On the **Lines** FastTab, enter **Type**, **No.**, and **Quantity**.
The system displays a dialog box confirming the presence of multiple associated sales contracts.
5. Click **Yes**.
The **Sales Lines** page opens.
6. The system updates the **Contract No.** and **Contract Line No.** fields based on the value of the **Auto Fill Sales Contract Details** toggle on the **Contract Setup** page. If the toggle is turned on, the values get auto-filled for sales order and sales invoice, otherwise, you can select them from the lookup table.

Note

The **Auto Fill Purchase Contract Details** toggle value is not applicable for **Sales Return Order** and **Sales Credit Memo** pages.

Additionally, the **Contract Exist** checkbox on the **Lines** FastTab is automatically selected.

7. On the action bar, select **Home** > **Release** > **Release**.
The sales order is released.



 Note

- When releasing/posting a sales order without assigning the corresponding sales contract, the system displays a message notifying the presence of the sales contract.
- The system displays a warning message when the shipping quantity exceeds the contract quantity when releasing a sales order linked to a sales contract and the **Exceed Sales Contract Qty. Alert Type** field value is set to *Warning* on the **Contract Setup** page. For more information, see [Set up contract management](#). If the Aptean [Over Under Delivery](#) extension is installed and an over-receipt code is set up, the system allows receiving additional quantities, as defined in the over-receipt code. In this case, the system displays an error or a warning message based on the configured alert type when the receiving quantity exceeds the over-receipt allowance.



Create purchase orders from purchase contracts

Article • 6/4/2025 • 3 min read

Creating purchase orders from purchase contracts allows businesses to maintain compliance, reduce discrepancies, and increase accountability. This process minimizes error risk, strengthens vendor relationships, supports budget compliance, and ultimately improves the procurement workflow's efficiency and cost-effectiveness.

You can create one or multiple purchase orders from a purchase contract based on the item number, vendor number, quantity, and quantity to receive. The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Purchase Contracts**, and then choose the related link.
The **Purchase Contracts** list page opens.
2. Select the preferred **No.**
The **Purchase Contract** card page opens.
3. On the action bar, select **Process > Make Order**.
The **Create Contract Orders** page opens.

! Note

- If the **Vendor No.** field value is blank on the **Purchase Contract** page, then you cannot select the **Make Order** action.
- You cannot create a purchase order without defining the **Qty. to Receive** field value on the **Purchase Contract** page and when the **Status** field value is not set to *Released*.
- If the **Qty. to Receive** field value exceeds the **Contract Qty** field value, the system displays an error or a warning message based on the setup. For more information, see [Set up contract management](#).

4. On the **Options** FastTab, fill in the below fields:

Field	Description
Contract No.	Specifies the contract number based on which the purchase orders will be created. It gets inherited from the purchase contract.
No. of orders to create	Specifies the number of purchase orders you want to create based on the specified purchase contract.
Exclude Lines with Zero Qty.	Specifies whether you want to exclude the purchase contract line items with zero quantity while creating the associated purchase orders.



 Note

You can choose any location on the purchase document if no location is specified on the purchase contract. However, if a location is specified on the purchase contract, you must use that specified location to proceed with contract.

You can also schedule a job queue by selecting the **Schedule** action and configuring the field values on the **Schedule a Report** page. The associated purchase orders are created.

These purchase orders inherit **Qty.**, **UOM**, and **Location Code** from the associated Purchase Contract. You can change the **Qty.** and **UOM** field values as required when the related order is not linked to any contract. However, the **Location Code** field is not editable.

 Note

- If the Unit of Measure (UoM) in a purchase order differs from the UoM in the associated purchase contract, the system will convert the **Direct Unit Cost Excl. VAT** field value.
- When a purchase order is created with the same item and vendor details within the specified date range of the purchase contract, the system inherits the relevant details from the **Contract Setup** page.



Create sales orders from sales contracts

Article • 6/4/2025 • 4 min read

Creating sales orders from sales contracts streamlines processes, reduces disputes, and enhances efficiency by providing clear guidelines for sales teams, ensuring consistency, and maximizing revenue potential.

You can create one or multiple sales orders from a sales contract based on the item number, customer, quantity, and quantity to ship. The following procedure describes how to perform this activity.

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

The **Sales Contracts** list page opens.

2. Select the preferred **No.**

The **Sales Contract** card page opens.

3. On the action bar, select **Process** > **Make Order**.

The **Create Contract Orders** page opens.

Note

- If the **Customer No.** field value is blank on the **Sales Contract** page, then the **Create Sales Order** action gets disabled.
You cannot create a sales order without defining the **Qty. to Ship** field value on the **Sales Contract** page and the **Status** field value is not set to *Released*.
- If the **Qty. to Ship** field value exceeds the **Contract Qty** field value, the system displays an error or a warning message based on the setup. For more information, see [Set up contract management](#).
If the Aptean [Over Under Delivery](#) extension is installed and an over-receipt code is set up, the system allows receiving additional quantities, as defined in the over-receipt code. In this case, the system displays an error or a warning message based on the configured alert type when the receiving quantity exceeds the over-receipt allowance.

4. On the **Options** FastTab, fill in the required fields.

You can also schedule a job queue by selecting the **Schedule** action and configure the field values on the **Schedule a Report** page.

Note

You can choose any location on the sales document if no location is specified on the sales contract. However, if a location is specified on the sales contract, you must use that specified location to proceed.

These sales orders inherit **Qty.**, **UOM**, and **Location Code** fields from the associated **Sales Contract** page. You can change the **Qty.** and **UOM** field values as required when the related order is not linked to any order. However, the **Location Code** field is not editable.



 Note

- If the **Unit of Measure (UoM)** field value in a sales order differs from the UoM in the associated sales contract, the system converts the **Direct Unit Cost Excl. VAT** field value.
- When a sales order is created within a contract's date range for the same item and customer combination, the contract number and line number are automatically updated on the sales order from the **Contract Setup** page. This applies to sales credit memos, sales return orders, sales invoices, and posted sales documents.

The associated sales orders are created.



Create a contract with alternate items

Article • 11/28/2024 • 6 min read

Alternate items are vital substitutes for primary inventory, seamlessly stepping in when stock is depleted. This functionality proves valuable in sales or purchase contracts by ensuring a continuous sales or supply chain despite stock shortages. These items optimize inventory control, maintaining operational flow and enhancing order fulfillment, thus reducing disruptions within businesses' inventory management processes.

You can create purchase and sales contracts with alternate items. The following procedure describes how to perform this activity.

Setup contract alternate items

1. Select the Search icon , enter **Items**, and then choose the related link.
The **Items** list page opens.
2. Select the desired **No.**
The **Item Card** page opens.
3. On the action bar, select **Related** > **Items** > **Contract Alternate Items**.
The **Alternate Items** page opens.
4. Fill in the following fields:

Field	Description
Item No.	Specifies the parent item number.
Alternate Item No.	Enter the assigned item number for the item intended for use with the parent item. You cannot add an identical item to the parent item as an alternate item, nor you can add the same item twice as an alternate.
Alternate Unit of Measure Code	Enter the unit of measure code that will be used for the defined alternate item.
Alternate Description	Enter the description for the alternate item.

 **Note**

The system inherits the **Item No.**, **Alternate Unit of Measure Code**, and **Alternate Description** field values from the associated **Item Card** page.

The alternate items are configured and can be linked to specific purchase contracts.



Assign alternate items to purchase contract

1. Select the Search icon , enter **Purchase Contracts**, and then choose the related link.
The **Purchase Contracts** list page opens.
2. Select the desired **No.**
The **Purchase Contract** card page opens.
3. On the **Lines** FastTab, select **Line > Alternate Items**.
The **Purch. Contract Alt. Items** page opens.

Note

When you select a parent item on the purchase contract line, the associated alternate items get inherited on the **Purch. Contract Alt. Items** page, and the **Contract Alternate Item Exists** checkbox is selected on the **Lines** FastTab of the associated **Purchase Contract** page.

4. Select the desired **Alternate Item No.**
The alternate item is assigned to the purchase contract.
5. On the action bar, select **Add Alternate Items** to register alternate items.

Note

The pricing hierarchy principle extends to the alternate items. For more information, see [Aptean Advanced Pricing](#).

Assign alternate items to sales contract

1. Select the Search icon , enter **Sales Contracts**, and then choose the related link.
The **Sales Contracts** list page opens.
2. Select the desired **No.**
The **Sales Contract** card page opens.
3. On the **Lines** FastTab, select **Line > Alternate Items**.
The **Sales Contract Alt. Items** page opens.



 Note

When you select a parent item on the sales contract line, the associated alternate items get inherited on the **Sales Contract Alt. Items** page. Additionally, the **Contract Alternate Item Exists** checkbox is selected on the **Lines** FastTab of the associated **Sales Contract** page.

4. Select the desired **Alternate Item No.**

The alternate item is assigned to the sales contract.

5. On the action bar, select **Add Alternate Items** to register alternate items.



View contract information on sales and purchase order archives

Article • 6/4/2025 • 1 min read

When sales and purchase order archives are created from sales and purchase orders, that are linked to sales and purchase contracts, the system inherits contract details in the **Contract No.** and **Contract Line No.** fields on the **Lines** FastTab of the **Sales Order Archive** and **Purchase Order Archive** pages, respectively. This ensures traceability and compliance with contractual obligations.



Reports

Article • 7/22/2026 • 13 min read

Reports in Business Central play a crucial role, offering in-depth insights into various business operations. They support informed decision-making, enable performance analysis, and maintain transparency. This helps businesses to enhance processes and drive strategic growth.

Purchase Contract with Small Remaining Quantity

With this report, you can gain a concise overview of all the open purchase contracts with small quantities, filtered according to input tolerance. The following procedure describes how to perform this activity.

- 1. Select the Search icon , enter **Purchase Contracts**, and then choose the related link.
The **Purchase Contracts** list page opens.
- 2. On the action bar, select **Reports > Purchase Contract with Small Remaining Quantity**.
The **Purchase Contract with Small Remaining Quantity** report page opens.
- 3. On the **Options** FastTab, fill in the following fields:

Field	Description
Small Qty Tolerance %	Specifies the acceptable tolerance percentage for deviations in remaining small quantities.
Close Contract	Turn on the toggle to include data from closed contracts in the fetched results.

- 4. On the **Filter** FastTab, define the values for which you want to filter the entries.
- 5. On the **Integer** FastTab, select the fields based on which you want to fetch the entries.
- 6. On the **Advanced** FastTab, define the field values based on which the system will generate a more detailed report.
- 7. Click **Print**.

The report is generated based on the data available on the **Purchase Contracts** list page.

Schedule a job queue

You can schedule a job queue to automatically close or open contracts with small remaining quantities using this report. The following procedure describes how to perform this activity.



1. Select the Search icon , enter **Job Queue Entries**, and then choose the related link.
The **Job Queue Entries** page opens.
2. On the action bar, click **New**.
The **Job Queue Entry Card** page opens.
3. On the **General** FastTab, in the **Object Type to Run** field, select *Report*.
4. In the **Object ID to Run** field, select *71622821* which is the assigned ID for the **Purchase Contract with Small Remaining Quantity** report.
5. On the **Report Parameters** FastTab, define the field values to specify the behavior of the job queue entry.
The job queue is scheduled. For more information, see [Use job queues to schedule tasks](#).

You can also generate a **Sales Contract With Small Remaining Quantity** report by selecting **Report > Sales Contract With Small Remaining Quantity** on the action bar of the **Sales Contracts** list page .

Purchase Contract Statistics

With this report, you can gain comprehensive insights into procurement transactions and detailed analytics on contract performance, expenditure patterns, and vendor engagement. You can employ these statistical insights to streamline procurement strategies and uncover cost-saving opportunities.

This facilitates enhanced operational efficiency and fosters business expansion. The following procedure describes how to perform this activity.

1. Select the Search icon , enter **Purchase Contracts**, and then choose the related link.
The **Purchase Contracts** list page opens.
2. Select the desired **No.**
The **Purchase Contract** card page opens.
3. On the action bar, select **Process > Statistics**.
The **Purchase Contract Statistics** page opens.
The **Purchase Contract Statistics** page displays the following fields:

On the **General** FastTab,

Field	Description
Amount Excl. VAT	Specifies the net amount of all the lines on the purchase order. This amount does not include VAT or any invoice discount but does includes line discounts.
Inv. Discount Amount	Specifies the invoice discount amount for the entire purchase order.
Total Excl. VAT	Specifies the total amount less than any invoice discount amount and excluding VAT for the purchase order.



VAT Amount	Specifies the total VAT amount that has been calculated for all the lines on the purchase order.
Total Incl. VAT	Specifies the amount, including VAT. On the Invoicing FastTab, this is the amount that is posted to the vendor's account for all the lines on the purchase order if you post the purchase order as invoiced.
Purchase (LCY)	Specifies the amount in the Total field, converted to LCY.
Quantity	Specifies the total quantity of G/L account entries, fixed assets, and/or items in the purchase order.
Parcels	Specifies the total number of parcels in the purchase order.
Net Weight	Specifies the total net weight of the items in the purchase order.
Gross Weight	Specifies the total gross weight of the items in the purchase order.
Volume	Specifies the total volume of the items in the purchase order.
No. of Tax Lines	Specifies the number of lines on the purchase order that have VAT amounts.

On the **Invoicing** FastTab,

Field	Description
Amount Excl. VAT	Specifies the net amount of all the lines in the purchase order. This amount does not include VAT or any invoice discount but does include line discounts.
Inv. Discount Amount	Specifies the invoice discount amount for the entire purchase order.
Total Excl. VAT	Specifies the total amount less than any invoice discount amount and excluding VAT for the purchase order.
VAT Amount	Specifies the total VAT amount that has been calculated for all the lines in the purchase order.
Total Incl. VAT	Specifies the amount, including VAT. On the Invoicing FastTab, this is the amount that is posted to the vendor's account for all the lines on the purchase order if you post the purchase order as invoiced.
Purchase (LCY)	Specifies the amount in the Total field, converted to LCY.
Quantity	Specifies the total quantity of G/L account entries, fixed assets, and/or items in the purchase order.
Parcels	Specifies the total number of parcels in the purchase order.



Net Weight	Specifies the total net weight of the items in the purchase order.
Gross Weight	Specifies the total gross weight of the items in the purchase order.
Volume	Specifies the total volume of the items in the purchase order.
No. of Tax Lines	Specifies the number of lines on the purchase order that have VAT amounts.

On the **Shipping** FastTab,

Field	Description
Amount Excl. VAT	Specifies the net amount of all the lines in the purchase order. This amount does not include VAT or any invoice discount but does include line discounts.
Inv. Discount Amount	Specifies the invoice discount amount for the entire purchase order.
Total Excl. VAT	Specifies the total amount less than any invoice discount amount and excluding VAT for the purchase order.
VAT Amount	Specifies the total VAT amount that has been calculated for all the lines in the purchase order.
Total Incl. VAT	Specifies the amount, including VAT. On the Invoicing FastTab, this is the amount that is posted to the vendor's account for all the lines on the purchase order if you post the purchase order as invoiced.
Purchase (LCY)	Specifies the amount in the Total field, converted to LCY.
Quantity	Specifies the total quantity of G/L account entries, fixed assets, and/or items in the purchase order.
Parcels	Specifies the total number of parcels in the purchase order.
Net Weight	Specifies the total net weight of the items in the purchase order.
Gross Weight	Specifies the total gross weight of the items in the purchase order.
Volume	Specifies the total volume of the items in the purchase order.
No. of Tax Lines	Specifies the number of lines on the purchase order that have VAT amounts.

On the **Prepayment** FastTab,

Field	Description
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Prepmt. Amount Excl. VAT	Specifies the prepayment amount of the purchase contract, excluding VAT, when a prepayment percentage is specified for the contract.
VAT Amount	Specifies the tax amount for this purchase contract.
Prepmt. Amount Incl. VAT	Specifies the prepayment amount of the purchase contract, including VAT, when a prepayment percentage is specified for the purchase contract.
Prepmt. Amt. Invoiced Excl. VAT	Specifies the invoiced prepayment amount excluding VAT for this purchase contract.
Invoiced % of Prepayment Amt.	Specifies the percentage of the total prepayment amount that has been invoiced.
Prepmt. Amt. Deducted Excl. VAT	Specifies the sum deducted from the prepayment amount, excluding any VAT.
Deducted % of Prepayment Amt. to Deduct	Specifies the percentage of the total prepayment amount defined for deduction.
Prepmt. Amt. to Deduct Excl. VAT	Specifies the prepayment amount eligible for deduction excluding Value Added Tax (VAT).
No. of VAT Lines	Specifies the number of purchase order lines linked to the VAT ledger line.

On the **Vendor** FastTab,

Field	Description
Balance(LCY)	Specifies the vendor's outstanding balance in local currency (LCY). This represents the total amount owed to the vendor (debt).

You can also generate a **Sales Contract Statistics** report by selecting **Process > Statistics** on the action bar of the **Sales Contract** card page. With this report, you can monitor sales contract performance, analyze trends, and optimize strategies to drive business growth.

Print Purchase Contract

With this feature, you can print a detailed report of the specified purchase contracts. The printed report also shows the **Vendor Order No.** field and the **Your Reference** field from the purchase contract. The following procedure

describes how to perform this activity. 1. Select the Search icon , enter **Purchase Contracts**, and then choose the



related link.

The **Purchase Contracts** list page opens. 2. On the action bar, select **Reports > Print**.

The **Print Purchase Contract** page opens. 3. On the **Filter** FastTab, define the values for which you want to print the contracts. 4. On the **Integer** FastTab, select the fields based on which you want to filter the contracts. 5. On the **Advanced** FastTab, define the field values based on which the system will generate a more detailed report. 6. Click **Print**.

The report is generated based on the defined values.

You can also print a detailed report of specific sales contracts by selecting **Reports > Print** on the action bar of the **Sales Contracts** list page. The printed sales contract report shows the **Terms of Delivery** field, the **Payment Terms** field, the **VAT %** field, the **VAT No.** field, the **Total Excl. VAT** field, and the **Total Incl. VAT** field.



Integrations

Article • 8/27/2025 • 1 min read

Changes are made to the Aptean Contract Management extension to support the integration with the following extensions:

- [Aptean Advanced Pricing](#)
- [Aptean Over Under Delivery](#)
- [Aptean Advanced Attributes](#)
- [Aptean Commodity Harvest Planning](#)
- [Aptean Approved Supplier](#)
- [Aptean Dynamic Comments](#)
- [Aptean Document Publication](#)



Aptean Advanced Pricing

Article • 11/29/2024 • 1 min read

You can use the Aptean Contract Management extension in conjunction with the Aptean [Advanced Pricing](#) extension to view the pricing details linked to the specified item in the purchase contract on the **Applied Purchase Prices and Discounts** page.

! Note

- When a purchase order is created from a purchase contract, the system determines the price of the item on the purchase order according to the following order of priority: Purchase contract takes precedence over the price list retrieved from the Aptean **Advanced Pricing** extension, which in turn takes precedence over the item card.(Purchase Contract > Price list from Aptean Advance Pricing extension > Item Card).
- In sales orders generated from a sales contract, the pricing hierarchy is as follows: the sales contract takes precedence over the price list from the Aptean Advanced Pricing extension, taking precedence over the item card. (Sales Contract > Price list from Aptean Advance Pricing extension > Item Card).



Aptean Over Under Delivery

Article • 11/29/2024 • 1 min read

You can use the Aptean Contract Management extension in conjunction with the Aptean [Over Under Delivery](#) extension to receive quantities higher than those ordered, following an over-receive policy set up on the **Over-Receipt Codes** page. By specifying the **Over-Receipt Tolerance** % field value and selecting a default policy, you can establish parameters for handling over-delivery. Contract management enables exceeding receivables on purchase orders when an over-receipt code applies, resulting in a negative outstanding quantity on the contract.

Additionally, the Aptean Over Under Delivery extension allows receiving or shipping more or less than the originally ordered quantity on purchase and sales orders. Contract management will accommodate this tolerance allowance in related purchase orders and sales orders when over-receipt is applicable in the associated purchase and sales contract.



Aptean Advanced Attributes

Article • 11/29/2024 • 2 min read

You can use the Aptean Contract Management extension in conjunction with the Aptean [Advanced Attributes](#) extension to display eight global lot attribute columns in purchase and sales contracts. This setup allows entering attribute values for used items based on permissions defined in the lot attribute template. In the contract's line, you cannot modify fixed attribute values but can select allowed values. The system rejects any non-allowed value that you enter.

You can create an order that's associated with the contract or add a contract-associated item to an existing order. The system automatically transfers the attributes' values from the contract to the order's line. The system shows an error if you change a contract-associated value of an attribute on the order's line. To change an attribute's value, delete the contract's number from the **Contract No.** field, and then select the required allowed value. The system shows an error when associating a contract using the **Contract No.** field to an order line if the order line's attribute value differs from the contract line's attribute value.

A sales contract has an additional functionality where you can add a non-global lot attribute to the contract's line. The non-global lot attribute values are inherited from the **Item Lot Attribute Template** page to the **Lot Attribute Requirements** page. The following changes are possible on the **Lot Attribute Requirements** page.

- Modification of the lot attribute values unless the lot attributes have fixed values
- Addition of the lot attributes
- Delete of the lot attributes



Aptean Commodity Harvest Planning

Article • 11/29/2024 • 1 min read

You can use the Aptean Contract Management extension in conjunction with the Aptean [Commodity Harvest Planning](#) extension to create purchase contracts from the **Harvest Orders** and **Harvest Planning** pages with the **Create Purchase Contract** action for each line or all the lines of the related document.



Aptean Approved Supplier

Article • 3/14/2025 • 1 min read

When the Aptean Contract Management extension is used in conjunction with the Aptean [Approved Supplier](#) extension, the system applies approved supplier and item requirements to purchase contracts.



Aptean Dynamic Comments

Article • 8/27/2025 • 1 min read

When the Aptean Contract Management extension is used in conjunction with the Aptean [Dynamic Comments](#) extension, the system applies dynamic comments and related information to purchase contracts.



Known issues

Article • 1/28/2026 • 1 min read

The table below lists known issues identified across releases. We are actively investigating and resolving them as part of our commitment to continuous improvement.

ID	Description	Status	Found in version	Fixed in version
340754	The system fails to update the Harvest Order No. field value in the purchase order lines when the Contract No. field value is entered manually.	Under investigation	2601.1.0.0	
336281	The system incorrectly triggers an excess quantity notification when a contract is added to a purchase order line before the quantity is entered. When a purchase contract is referenced in a purchase order line and the quantity is subsequently entered within the available contract quantity, the system incorrectly prevents the transaction and displays an excess quantity error, even though sufficient outstanding quantity remains available in the contract.	Under investigation	2601.1.0.0	
332792	The system incorrectly retains the Harvest Order No. and Harvest Order Line No. field values in the purchase document lines even after deleting the Contract No. field value.	Under investigation	2601.1.0.0	

