

User Manual

Aptean Food and Beverage ERP

Combine Shipment per Period

Product Documentation



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Release Notes

Article • 3/25/2026 • 1 min read

To view what's new or changed in each release of the Aptean Combine Shipments per Period extension, select the specific release version.

Date	Release version	Description
March 2026	2502.7.0.0	Stability release
February 2026	2502.6.0.0	Stability release
September 2025	2502.5.0.0	Stability release
July 2025	2502.4.0.0	Stability release
April 2025	2502.3.0.0	Stability release
March 2025	2502.2.0.0	Stability release
March 2025	2502.1.0.0	Stability release
February 2025	2502.0.0.0	Feature release
January 2025	2501.0.0.0	Feature release
December 2024	2403.0.0.0	Feature release
August 2024	2402.2.0.0	Stability release
August 2024	2402.1.0.0	Stability release
June 2024	2402.0.0.0	Feature release
May 2024	2401.1.0.0	Stability release
May 2024	2401.0.0.0	Feature release
September 2023	1.2.115754.0	Stability release
May 2023	1.1.101715.0	Stability release
January 2023	1.0.76676.0	Initial release



2502.7.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Combine Shipment per Period extension,

- The filtering and processing logic of the **Combine Shipment Per Period** report has been optimized to improve performance, ensuring the report data loads efficiently even when a customer has multiple shipments. This enhancement addresses the issue reported in bug ID #342268.
- The system throws an error for over-delivered weight quantity shipment lines if the extra prepayment invoice is not posted when creating a consolidated sales invoice via the **Combine Shipment By** page when the Aptean [Catch Weight](#) extension is installed. For more information, see [Create Consolidated Invoice](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
342268	A performance issue occurs when running the Combine Shipment Per Period report as the system experiences a significant delay while loading data.



2502.6.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
351776	The system fails to update the Payment Terms and Payment Method field values on the Sales Invoice page from the associated fields on the Sales Order page. This issue occurs when the related sales invoice is created via the Combine Shipments report.
347085	The system fails to update the field values on the Ultimate Consignee FastTab of the Sales Invoice page when the Combine Shipment By field value is set to <i>Order</i> on the related Customer Card page.



2502.5.0.0

Release Note • 9/24/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
317603	When the language is set to Dutch, the system displays incorrect translations for the following captions: • The <i>Order</i> option in the Combine Shipment By field on the Customer Card page. • The <i>Order</i> option in the Combine per period field on the Combine Shipment By page. • The Combine Shipment By page.



2502.4.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Combine Shipments per Period extension, the translation file for the Chinese (zh-CN) language has been added.



2502.3.0.0

Release Note • 4/28/2025 • 1 min read

Enhancements/Modifications

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



2502.2.0.0

Release Note • 3/12/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
268290	The system fails to create a posted service invoice when the Posting Date field value is blank on the Combine Shipment By page. This issue occurs when creating a job queue using the Report Request Page action on the Job Queue Entry Card page.



2502.1.0.0

Release Note • 3/5/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
270092	The system fails to update the Combine Shipment By field value on the Sales Order and Posted Sales Shipment pages. This issue occurs when the relevant sales order is created from the Customer Card page.



2502.0.0.0

Release Note • 2/3/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Combine Shipments per Period extension, you can filter combined shipments using the **Combine per period** field on the **Combine Shipment By** page. The system matches this filter field value with the **Combine Shipment By** field value on the **Customer Card** page to determine the relevant combine shipments. For more information, see [Create consolidated invoice](#).

UI/UX changes

The **Combine per period** field has been added to the **Combine Shipment By** page.



2501.0.0.0

Release Note • 1/29/2025 • 1 min read

Features

With this release of the Aptean Combine Shipments per Period extension, you can transfer values from the **Ship-to Address Code, Shipping Method Code, Agent, Bill-to Customer, Currency Code, Payment Terms Code, External Document No.** and **EDI Inbound Entry No.** fields as follows:

- Sales order to sales invoice header
- Sales return order to sales credit memo header
- Posted sales document to sales return order header
- Posted sales document to sales credit memo header

For more information see, [Sales & Receivables Setup](#).

UI/UX Changes

The following toggles have been added to the **Transfer Field Values** group on the **General** FastTab of the **Sales & Receivable Setup** page:

- From a sales order to a sales invoice header
- From a sales return order to a sales credit memo header
- From a posted sales document to a sales return order header
- From a posted sales document to a sales credit memo header



2403.0.0.0

Release Note • 12/9/2024 • 1 min read

Features

With this release of the Aptean Combine Shipments per Period extension, when you have the Aptean Ultimate Consignee extension installed, when a sales invoice is created from the **Combine Shipment By** page, the system compares the consignee code of the last shipment line with the ship-to address specified on the associated **Customer Card** page. If the consignee code is linked to the ship-to address, the system inherits the consignee address details. If the consignee code does not exist for the ship-to address, the system does not inherit the consignee address details. To know more, see [Highlights of Ultimate Consignee, version 2401.0.0.0](#).



2402.2.0.0

Release Note • 8/21/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Combine Shipments per Period extension, modifications have been made to accommodate the following changes:

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

! Note

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



2402.1.0.0

Release Note • 8/9/2024 • 1 min read

Enhancements/Modifications

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



2402.0.0.0

Release Note • 6/7/2024 • 1 min read

Features

With this release of the Aptean Combine Shipments per Period extension, you can use the Combine Shipments By functionality to consolidate multiple shipments for a bill-to customer into a single invoice. For more information, see [Combine Shipments Setup](#).

UI/UX changes

The **Combine Shipment Per** field is added to the **Customer Card** page.



2401.1.0.0

Release Note • 5/27/2024 • 1 min read

Enhancements/Modifications

The translation files for the following languages have been updated with standard texts for better readability.

- Danish (da-DK)
- German (de-DE)
- Spanish (es-ES)
- French (fr-FR)
- Dutch (nl-NL)
- Swedish (sv-SE)



2401.0.0.0

Release Note • 5/15/2024 • 1 min read

Enhancements/Modifications

With this release, you can use the Aptean Combine Shipment per Period extension in conjunction with the Aptean Advanced Comments extension to copy comments from sales orders to sales invoices when combining shipments in your system. To know more, see [What's new in version 2401.0.0.0](#).



1.2.115754.0

Release Note • 9/5/2023 • 1 min read

Enhancements/Modifications

With this release of the Aptean Combine Shipments per Period extension, you can combine shipments into a single invoice based on the *Order* and *Shipment* options selected in the **Combine Shipment By** field.

UI/UX changes

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

- The **Combine Shipments Period** field is renamed to **Combine Shipment By** on the **Customer Card** page.
- The *Order* and *Shipment* options are added to the **Combine Shipment By** field.
- The **Combine Shipments Per Period** action is renamed to **Combine Shipment By**.

Deprecated features

The Aptean License Management extension can no longer be used in conjunction with the Aptean Combine Shipments extension. The integration has been removed to enhance the overall user experience and maintain seamless performance.



1.1.101715.0

Release Note • 6/2/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to work seamlessly with Business Central version 22.



1.0.76676.0

Release Note • 4/3/2023 • 1 min read

Features

With this release of the **Aptean Combine Shipments per Period** extension, you can:

- Combine multiple shipments into a single invoice by specific date/week/month on the **Customer Card** page. For more details, see [Combine Shipments Setup](#) for more information.
- Further enhance the combine shipment by week, by selecting the start of week day between Saturday, Sunday and Monday.



Introduction

Article • 4/3/2023 • 1 min read

The Aptean Combine Shipments per Period (CSP) extension simplifies the process of combining the shipments into invoices using time or type specifications on the Customer Card. This function enables you to set the timeframe or criteria by which sales shipments should be combined within a single invoice. The available options are *Date*, *Week*, *Month*, *Order*, *Shipment*, and the default Business Central setting, i.e., by Customer per Shipment.



Setup

Article • 10/25/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up combine shipments](#)



Manage permission sets

Article • 10/25/2024 • 3 min read

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

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

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

The direct permission set ID for this extension is *COMBINESHIPMENT95FDW*.

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 *COMBINSHIPBASIC95FDW*.

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.



Combine Shipment per Period

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



Set up combine shipments

Article • 6/7/2023 • 3 min read

You can use the combine shipments setup to combine shipments into a single invoice with the help of the **Combine Shipment By & Period Start of Week** fields on the **Customer Card** page.

1. Select the Search icon , enter **Customers**, and then choose the related link.
The **Customers** page opens.
2. Select the required customer **No.** from the list.
3. On the **Shipping** FastTab, in the **Combine Shipment By** field, select the required option from the drop-down menu. The available options are listed in the following table:

Option	Description
Default	Combine multiple shipments into a single invoice based on standard Business Central functionality by running the Combine Shipments report.
Date	Combine multiple shipments into a single invoice for the specified date.
Week	Combine multiple shipments into a single invoice for the specified week.
Month	Combine multiple shipments into a single invoice for the specified month.
Order	Combine multiple shipments for a customer into a single invoice based on the orders. Separate invoices will be created for each order placed by the selected customers.
Shipment	Combine multiple shipments for a customer into individual invoices based on the shipments completed for each order.

4. In the **Period Start of Week** field, select the first day of the week for the invoice from the drop-down menu if you combine multiple shipments into a single invoice by week. The default day of the week is *Sunday*.
You can perform this function on the following pages:

5. Sales orders
6. Posted Sales Shipments
7. Sales Invoices

Important

The **Combine Shipment By** is an add-on feature to the existing Business Central Combine Shipment report. You must turn on the **Combine Shipments** toggle on the **Customer Card** page.

8. In the **Combine Shipment Per** field, select the required option from the following list:



Combine Shipment per Period

- *Sell-to Customer* – Select this option if you want to combine shipments for the sell-to customer into one invoice. This is useful when you have multiple shipments going to the same customer and you prefer to streamline the billing process by issuing one invoice instead of multiple ones. This is the default option
- *Bill-to Customer* - Select this option if you want to combine shipments based on the bill-to customer. This is useful when you have different sell-to customers who are billed to a single customer. By choosing this option, all shipments billed to the same customer will be combined into a single invoice.

Note

This field is visible only when the **Combine Shipment By** field is set to *Date*, *Week*, and *Month*.



Sales & Receivables Setup

Article • 1/29/2025 • 4 min read

You can configure the fields on the **Sales & Receivables Setup** page to enable you to choose to transfer field values between sales documents. 1. Select the Search icon , enter **Sales & Receivables Setup**, and then choose the related link. 2. On the **General** FastTab, in the **Transfer Field Values** group, configure the following toggles as required.

Field	Description
From Orders to Invoices	Turn on this toggle if you want the system to inherit the Ship-to Address Code, Shipping Method Code, Agent, Bill-to Customer, Currency Code, Payment Terms Code, External Document No. and EDI Inbound Entry No. field values from sales orders header to sales invoices header when selecting the Get Shipment Lines action or the Combine Shipment By action. NOTE: • When you select the Get Shipment Lines action, the system transfers field values from the sales order header to the sales invoice header for each individual shipment that is selected. • When you select the Combine Shipments By action, the system transfers field values from the sales order header to the sales invoice header for each individual shipment selected, after grouping shipments based on order or shipment criteria. • The system displays a notification indicating that previously populated fields will be overwritten when multiple shipment lines are selected. • The system displays an error message when there is an inconsistency in the header fields.
From Return Orders to Credit Memos	Turn on this toggle if you want the system to inherit the Ship-to Address Code, Shipping Method Code, Agent, Bill-to Customer, Currency Code, Payment Terms Code, External Document No. and EDI Inbound Entry No. field values from sales return order header to sales credit memos header when selecting the Get Return Receipt Lines action. NOTE: • The system displays a notification indicating that the header fields will be updated with values from the most recent sales



	return order when the Get Return Receipt Lines action is executed.
When Using Get Posted Doc. Lines to Reverse	Turn on this toggle if you want the system to inherit the Ship-to Address Code, Shipping Method Code, Agent, Bill-to Customer, Currency Code, Payment Terms Code, External Document No. and EDI Inbound Entry No. field values from last posted documents to sales credit memos header when selecting the Get Posted Doc. Lines to Reverse action. NOTE: • The system displays a notification indicating that the header fields will be updated with values from the last processed posted sales document when multiple Document No. entries are selected or when the Get Posted Doc. Lines to Reverse action is executed repeatedly.

 Note

The **EDI Inbound Entry No.** field will be visible only if the Aptean [EDI](#) extension is installed.



Create consolidated invoice

Article • 3/25/2026 • 2 min read

To combine multiple shipments for a customer into a single invoice:

1. Open the **Customers** page
2. On the action bar, select **Actions > Functions > Combine Shipment By**.
The **Combine Shipments** report page opens. Alternatively, you can also open this page via the search option.
3. On the **Options** FastTab, in the Posting Date and Document Date fields, select the required dates to create the invoices.
4. Turn on the following toggles based on your requirements:

Toggle	Description
Calc. Inv. Discount	Allow the system to automatically calculate the invoice discount amount during the shipment process.
Post Invoices	Post the invoices.
Only Std. Payment Terms	Include the shipments with standard payment terms, and you will need to invoice all other shipments manually.
Copy Text Lines	Copy the shipment lines to the invoice.

! Note

If the **Combine Shipment By** field is set as **Default** on the **Shipping** FastTab, the system will run as standard Business Central and create one invoice per bill to the customer in the shipment documents.

5. On the **Sales Shipment Header** FastTab, use the following fields to filter shipments.

Field	Description
Combine per period	Select the appropriate option to filter shipments according to the Combine Shipment By field value set on the Customer Card page.
Sell-to Customer No.	Select the appropriate sell-to customer number to filter shipments specifically for the sell-to customer.
Bill-to Customer No.	Select the relevant bill-to customer number to filter shipments for the specified bill-to customer.

 Note

By selecting the relevant customer number in these fields, you can ensure that only the shipments associated with the selected sell-to or bill-to customer are consolidated into a single invoice.

 Note

- The system throws an error when shipment lines with over-delivered quantities exist and the extra prepayment invoice is not posted while creating a consolidated sales invoice via the **Combine Shipment By** page. The error displays the Sales Order No., Shipment No., and Line No. for the lines where extra prepayment invoices must be posted before the invoice can be created when the Aptean [Over and Under Delivery](#) extension is installed,.
- The system throws an error for over-delivered shipment lines if the extra prepayment invoice is not posted when creating a consolidated sales invoice via the **Combine Shipment By** page. The error displays the sales order number, shipment number, and line number for the lines where extra prepayment invoices must be posted before the invoice can be created when the Aptean [Catch Weight](#) extension is installed.



Integrations

Article • 3/25/2026 • 1 min read

The Aptean Combine Shipments per Period extension has been integrated with the following extensions:

- [Aptean Over and Under Delivery](#)
- [Aptean Catch Weight](#)

