

User Manual

Aptean Food and Beverage ERP

Drop Shipment

Product Documentation



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Release notes

Article • 6/24/2026 • 1 min read

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

Date	Release version	Description
June 2026	2504.4.0.0	Minor release
March 2026	2504.3.0.0	Stability release
February 2026	2504.2.0.0	Stability release
January 2026	2504.1.0.0	Stability release
September 2025	2504.0.0.0	Feature release
September 2025	2503.0.0.0	Feature release
August 2025	2502.1.0.0	Stability release
June 2025	2502.0.0.0	Feature release
March 2025	2501.2.0.0	Platform release
February 2025	2501.1.0.0	Stability release
January 2025	2501.0.0.0	Feature release
December 2024	2402.1.0.0	Stability release
July 2024	2402.0.0.0	Feature release
May 2024	2401.1.0.0	Stability release
May 2024	2401.0.0.0	Initial release



2504.4.0.0

Release Note • 6/24/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean Drop Shipment extension, when a purchase order is created from a sales order via the **Drop Shipment** or **Special Order** page, the system automatically updates the **External Document No.** field value from the linked sales order into the **External Document No. - Sales Order** field value on the related purchase order. The **Your Reference** field value on the purchase order is also updated with the **Your Reference** field value from the sales order. If multiple sales orders are linked to the same purchase order, both the **External Document No. - Sales Order** and **Your Reference** field values are updated with the values from the last linked sales order. This enhancement addresses the issue reported in bug ID #359868.

UI/UX changes

The **External Document No. - Sales Order** field has been added to the **Purchase Order** page and the **Purchase Orders** list page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
359868	The system fails to copy the External Document No. field value from the sales order to the External Document No. - Sales Order field value on the purchase order when the purchase order is created through a drop shipment or special order process. Additionally, the system fails to populate the Your Reference field value on the purchase order from the linked sales order.



2504.3.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Drop Shipment extension, the **Shipment Method Code** field value from the **Sales Order** page is synchronized to the corresponding field on the **Purchase Order** page during the drop shipment process.



2504.2.0.0

Release Note • 2/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
350052	The system restricts from modifying the field values on a sales or purchase order when opened by using the Drop Shipment action from the respective order page.



2504.1.0.0

Release Note • 1/28/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
336976	The system fails to update the Quantity field value on the Sales Order page for drop shipment orders.



2504.0.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Drop Shipment extension, the system automatically selects the **Drop Shipment** checkbox on the sales order line when a sales order is created through intercompany and the vendor is configured for a drop shipment location.



2503.0.0.0

Release Note • 9/24/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
250968	An error occurs when executing the Post action on the Settlement page after executing the Create Invoice action. This issue arises when a drop shipment sales order is associated with the settlement, the Accounting Method field value is set to <i>Pooling</i> on the Settlement page, and the Aptean Grower Return extension is installed.



2502.1.0.0

Release Note • 8/27/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
310154	The system incorrectly displays an error when changing the Location Code field value in a sales order line from a drop shipment location to a warehouse location, instead of clearing the field values related to drop shipment.



2502.0.0.0

Release Note • 6/4/2025 • 1 min read

Features

With the features added in this release of the Aptean Drop Shipment extension, the packaging transactions are synchronized between sales and purchase documents. Additionally, the system automatically creates, updates, recalculates, and deletes packaging lines during the drop shipment process. To know more, see [Synchronizing packaging transactions in drop shipments](#).

Integrations

The Aptean Drop Shipment extension is integrated with the [Aptean Packaging](#) extension. To know more, see [Integrations](#).



2501.2.0.0

Release Note • 3/4/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Drop Shipment extension, the *CreateRequisitionLine* and *CheckDropShipmentSalesLines* procedures in the *RequisitionLineMgt147FDW* codeunit have been changed from internal to global to support customization.



2501.1.0.0

Release Note • 2/5/2025 • 1 min read

Enhancements/Modifications

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



2501.0.0.0

Release Note • 1/9/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Drop Shipment extension, the weight-related data is synchronized between sales and purchase documents during the drop shipment process when the Aptean Catch Weight extension is installed. To know more, see [What's new in Catch Weight, version 2501.0.0.0](#).



2402.1.0.0

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

Resolved issues

The following issue has been resolved in this release.

ID	Description
250104	An error occurs on the sales order line when the 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 Contract Management extension is installed.



2402.0.0.0

Release Note • 7/29/2024 • 1 min read

Features

With this release of the Aptean Drop Shipment extension, you can:

- Easily return drop-shipments from the **Posted Sales Shipment** page, triggering the creation and posting of sales return receipts and purchase return shipments. To know more, see [Return the drop shipment](#).
- Automatically transfer and synchronize attributes between drop shipment documents on integration with the Aptean Advanced Attributes extension. To know more, see [Managing advanced attributes and drop shipments](#).
- Prevent default inspection status assignments on drop shipments and restrict manual updates on integration with the Aptean Inspection Status extension. To know more, see [Managing inspection status and drop shipments](#).

Integrations

The Aptean Drop Shipment extension is integrated with the following extensions:

- Aptean Advanced Attributes
- Aptean Inspection Status

To know more, see [Integrations](#).

UI/UX changes

The **Return Drop Shipment** action is added to the **Functions** on the action bar of the **Posted Sales Shipment** page.



2401.1.0.0

Release Note • 5/24/2024 • 1 min read

Enhancements/Modifications

Modifications were made for the Aptean Drop Shipment extension to accommodate the following changes:

- Procedures were 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 were 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 were 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 was modified to use centralized license management procedures, further reducing the need for application-specific adjustments.



2401.0.0.0

Release Note • 5/15/2024 • 1 min read

Features

With the features added in this release of the Aptean Drop Shipment extension, you can:

- Configure the general setup to perform the drop shipment activity. To know more, see [Drop shipment setup](#).
- Define a drop shipment location.
- Create the drop shipment purchase orders from the sales order documents. To know more, see [Create drop shipment purchase orders](#).
- Undo the drop shipment and post the sales and purchase invoices. To know more, see [To undo drop shipment](#).
- View the **Vendor No.** field value on the **Requisition Worksheets** page, which is automatically populated when the drop shipment location code is used in the sales line.
- View the filtered list of sales orders that have the desired drop shipment vendor numbers when performing the **Get Sales Order** action to link the drop shipment sales order with the purchase order.



Introduction

Article • 5/15/2024 • 1 min read

The Aptean Drop Shipment (DRP) extension is crafted to uphold the practice of shipping items directly from vendors to customers, bypassing the need for the items to pass through your warehouse. While this process can be complex, the extension simplifies it by synchronizing quantities and shipment dates between sales and purchases, ensuring flexibility and increased efficiency. In today's fast-paced business environment, logistics management is essential, and this extension comprises various features specifically crafted to streamline the drop shipment process, ensuring seamless transactions and enhanced productivity. These features include simplified purchase order creation, synchronized quantity management, and a streamlined drop shipment process.



Setup

Article • 11/6/2024 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up drop shipment](#)



Manage permission sets

Article • 11/6/2024 • 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 *DROPSHIP147FDW*.

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 *DROPSHIPBASIC147FDW*.

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.



Drop Shipment

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



Set up drop shipment

Article • 5/15/2024 • 3 min read

The following description details the initial configuration steps required for the Aptean Drop Shipment extension to function as expected.

1. Select the Search icon , enter **Drop Shipment Setup**, and then choose the related link.
The **Drop Shipment Setup** page opens.
2. On the **General** FastTab, turn on the **Flexible Purchase Invoice Posting** toggle to post the purchase invoice documents before the corresponding sales invoice documents.
3. Turn on the **Skip Requisition Worksheet** toggle to skip the standard requisition worksheets function.
4. On the **Requisition Worksheet Template** FastTab, in the **Worksheet Template Name** field, select the name of the requisition worksheet template.
5. In the **Journal Batch Name** field, select the name of the journal batch on which the journal is based.

Alternatively, you can configure the drop shipment setup using the **Set up Drop Shipment** wizard on **Assisted Setup** page.

To know more about the standard drop shipment functionality, see [Make drop shipments](#).

Set up drop shipment location

You can define whether the drop shipment is required for the desired location during shipping activity.

1. Open the **Locations** page.
2. Select required location code.
The **Location Card** page opens.
3. On the **Drop Shipment** FastTab, turn on the **Drop Shipment** toggle to specify whether the items are shipped directly by the vendor to the respective customer in the desired location. You cannot turn off this toggle while there are active sales lines in the specific location.

Note

If this toggle is turned on, the **Drop Shipment** checkbox will be automatically selected on the **Sales Order** page whenever that specific location is used in the sales order line.

4. In the **Default Drop Shipment Vendor No.** field, select the required code from the dropdown menu. The vendor number selected here will be automatically populated on the sales order lines based on the hierarchy.
The associated vendor name will be automatically populated in the **Drop Shipment Vendor Name** field.



Note

When the **Drop Shipment** toggle is turned on or when using the drop shipment location, it's necessary to turn off certain toggles, such as the **Require Receive**, **Require Shipment**, **Require Put-away**, and **Require Pick** on the **Warehouse** FastTab.



Create drop shipment purchase orders

Article • 3/20/2025 • 6 min read

The system facilitates the creation of drop shipment purchase orders by using the **Drop Shipment** action from the sales order header and line.

1. Open the **Sales Order** page.
2. Fill in the required fields on the header.
3. On the **Lines** FastTab, in the **Drop Shipment Vendor No.** field, select the required code from the dropdown menu. Subsequently, the corresponding **Drop Shipment** checkbox gets selected automatically.
4. In the **Location Code** field, select the required drop shipment location. You can also choose to leave this field blank.

If the **Drop Shipment Vendor No.** field is empty after specifying the location code, the **Drop Shipment Vendor No.** field value is sourced from three pages in a hierarchical manner. Firstly, the system checks the **Stockkeeping Unit Card** page for a vendor number; if available, it populates the **Drop Shipment Vendor No.** field value. If not found, it then checks the associated **Location Card** page. If a vendor number is present, it fills the **Drop Shipment Vendor No.** field. If still not found, it proceeds to the associated **Item Card** page, populating the field if a vendor number is present.

5. On the action bar, select **Actions > Functions > Drop Shipment > Create Purchase Order**.

Note

On the **Lines** FastTab, select **Line > Functions > Drop Shipment > Create Purchase Order** from the action bar to create the drop shipment purchase order for the selected sales line.

The **Requisition Worksheets** page opens if the **Skip Requisition Worksheet** toggle is turned off on the **Drop Shipment Setup** page. You must fill in the required details to create the purchase order. To know more about Requisition Worksheet, see [Create special orders](#).

You can also post the sales order fully or partially for the *Ship*, and *Ship and Invoice* options. The drop shipment purchase order is created. If the sales order lines involve multiple drop shipment vendor numbers, the system generates multiple drop shipment purchase orders. On the **Lines** FastTab of the purchase order, select **Order > Drop Shipment > Purchase Order** to view the newly created drop shipment purchase order.

The below points detail the process following the creation of a purchase order for drop shipment.

- If the **Automatically Assign Lot No. on Purchase Order** field is set to *On Release* on the **Lot Management Setup** page, the **Item Tracking** field on the created drop shipment **Purchase Order** page is set to *Complete*, and the **Assigned Lot(s)** field is filled with the newly created lot number. This change is observed only when the order is released. To know more, see [Automatic Lot Numbering](#).

Furthermore, the linked drop shipment sales order will also inherit the same item tracking records. You can also synchronize the item tracking line with the related drop shipment purchase order item tracking line. > [!NOTE]

> - Ensure that the Aptean [Lot Management](#) extension is installed and configured in your Business Central



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environment. > - If the purchase order has an open status and is not released, the lot number is not assigned, irrespective of the setting.

- Changes made in the **Quantity**, **Qty. to Ship**, and **Shipment Date** fields of the sales order are reflected in the associated **Quantity**, **Qty. to Receive**, and **Expected Receipt Date** fields on the drop shipment purchase order lines.

Note

The system updates the changes made to the quantity or shipment date field values in the sales order lines to the drop shipment purchase order lines only if the related purchase order status is *Open*. Otherwise, the system displays an error when you attempt to update the sales order line.

- On the **Drop Shipment Setup** page, if the **Flexible Purchase Invoice Posting** toggle is turned on, you can post the purchase order for invoice before the associated sales order has been invoiced.
- Deleting the sales order line will also delete the associated drop shipment purchase order.

Note

You cannot perform the drop shipment activity when combining shipments into invoices using the **Combine Shipment By** report. To know more about combine shipments, see [Combine Shipments Setup](#).

External Document No. - Sales Order

The **External Document No. - Sales Order** field value inherits the **External Document No.** field value from the sales order linked to the purchase order through the drop shipment or special order processes. The field is populated automatically in the following scenarios:

- **Drop Shipment – Get Sales Orders:** When a purchase order is created from a sales order using the **Drop Shipment – Get Sales Orders** action, the **External Document No.** from the sales order is automatically copied to the **External Document No. - Sales Order** field on the purchase order.
- **Special Order – Get Sales Orders:** When a purchase order is linked to a sales order using **Actions > Functions > Special Order > Get Sales Orders** on the purchase order, the **External Document No.** from the sales order is automatically copied to the **External Document No. - Sales Order** field.
- **Requisition Worksheet – Carry Out Action Messages:** When a purchase order is created from the Requisition Worksheet using **Carry Out Action Messages** for lines flagged as Drop Shipment or Special Order, the **External Document No.** from the associated sales order is automatically copied to the **External Document No. - Sales Order** field on the created purchase order.
- **Multiple Sales Orders:** If multiple sales orders are linked to the same purchase order, the **External Document No. - Sales Order** field is updated each time a sales order is linked. The field always reflects the **External Document No.** of the last linked sales order.



Note

The field is hidden by default, consistent with other Drop Shipment fields on the **Purchase Order** page.

Undo the drop shipment

To undo the drop shipment, follow the below steps.

1. Open the required **Posted Sales Invoice** page.

2. On the action bar, select **Actions > Functions > Undo Drop Shipment**.

A dialog opens. In the **Return Reason Code** field, select the required option from the dropdown menu. The reason code will be updated on the sales return and purchase return orders.

Undoing the drop shipment will post the sales invoice and purchase invoice for shipped and received items that were not previously invoiced. It will also trigger the creation and posting of a sales return order and purchase return order, followed by the creation of a respective sales order and purchase order, which is irreversible. After performing the **Undo Drop Shipment** action, the system reverts the quantity and amount values in the posted sales invoice lines.

As a result, the system creates the corrective lines on the following documents:

- Item Ledger Entries
- Vendor Ledger Entries
- Customer Ledger Entries

Return the drop shipment

To return the drop shipment, follow the below steps.

1. Open the required **Posted Sales Shipment** page.

2. On the action bar, select **Actions > Functions > Return Drop Shipment**.

A dialog opens.

3. In the **Return Reason Code** field, select the required option from the dropdown menu. This reason code will be updated in the associated sales and purchase return orders.

Returning the drop shipment will trigger the creation and posting of a sales return receipt and purchase return shipment.



Note

- If all lines in the posted sales shipment are fully shipped and no invoice has been posted, the system will proceed with reversal.
- If any line in the posted sales shipment is partially shipped, an error occurs stating that partial drop shipments cannot be reversed.
- If an invoice has been posted for the drop shipment order, the system will display an error. It is recommended that you use the **Undo Shipment** action on the **Posted Sales Invoice** page.



Integrations

Article • 6/4/2025 • 1 min read

The Apteian Drop Shipment extension has been integrated with the following extensions:

- [Apteian Advanced Attributes](#)
- [Apteian Inspection Status](#)
- [Apteian Catch Weight](#)
- [Apteian Packaging](#)



Aptean Advanced Attributes

Article • 2/28/2025 • 1 min read

When the Aptean Drop Shipment extension is used in conjunction with the Aptean [Advanced Attributes](#) extension, the attributes associated with an item are automatically transferred to the drop shipment documents.

! Note

Ensure that the Aptean Advanced Attributes extension is installed and configured for drop shipments. Attributes can only be updated when the documents are in open status; once released, they cannot be updated. This integration transfers attributes from a sales order to the linked purchase order, ensuring consistency between the documents.



Aptean Inspection Status

Article • 2/28/2025 • 1 min read

When the Aptean Drop Shipment extension is used in conjunction with the Aptean [Inspection Status](#) extension, the default inspection status assignments to lots in drop shipment transactions are skipped.

! Note

Ensure that the Aptean Inspection Status extension is installed, and necessary inspection statuses and triggers are set up. As a result, the inspection statuses are not applied to lots on drop shipment documents, and users are restricted from manually assigning inspection statuses to these lots.



Aptean Catch Weight

Article • 2/28/2025 • 1 min read

When the Aptean Drop Shipment extension is used in conjunction with the Aptean [Catch Weigh](#) extension, the weight-related data is synchronized between sales and purchase documents during the drop shipment process. To know more, see [Integration with Aptean Drop Shipment](#).



Aptean Packaging

Article • 6/4/2025 • 1 min read

When the Aptean Drop Shipment extension is used in conjunction with the Aptean [Packaging](#) extension, packaging transactions are synchronized between sales and purchase documents. Additionally, the system automatically creates, updates, recalculates, and deletes packaging lines during the drop shipment process. To know more, see [Synchronizing packaging transactions in drop shipments](#).

