

User Manual

Aptean Food and Beverage ERP

Aptean E-Commerce

Product Documentation



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Release Notes

Article • 7/22/2026 • 1 min read

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

Date	Release version	Description
July 2026	2603.0.0.0	Major release
June 2026	2602.1.321809.0	Hotfix release
May 2026	2602.1.0.0	Minor release
April 2026	2602.0.0.0	Major release
March 2026	2601.3.0.0	Stability release
February 2026	2601.2.0.0	Stability release
February 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
November 2025	2504.1.0.0	Stability release
October 2025	2504.0.0.0	Feature release
September 2025	2503.0.0.0	Feature release
August 2025	2502.1.0.0	Stability release
July 2025	2502.0.0.0	Feature release
July 2025	2501.0.0.0	Initial release



2603.0.0.0

Release Note • 7/22/2026 • 4 min read

Features

With the features added in this release of the Aptean E-Commerce extension,

- Sales orders created from the e-commerce checkout flow can be automatically released in Business Central, eliminating manual intervention and accelerating order-to-fulfillment cycles. When the **Auto Release Ecom Orders** toggle is turned on in the **E-commerce Setup** page, orders are released immediately after checkout using the standard Business Central release functionality. When release fails due to a blocked customer, inventory issue, or other validation error, the order remains in *Open* status and a notification email is sent to the address in the **Admin Email** field (if configured). When a released order is subsequently modified through the e-commerce portal, the order is automatically reopened, modified, and re-released. Release failures are not visible to customers — a normal order confirmation is presented regardless of release outcome. For more information, see [Set up e-commerce](#).
- The last date on which a customer ordered each item is displayed on the customer profile catalog in the e-commerce portal, helping customers identify their regular items and make informed reordering decisions. The feature is controlled by the **Show Last Order Date** toggle on the **E-commerce Setup** page. When turned on, each item on the profile catalog displays *Last ordered: [date]* based on open sales orders and posted sales history, at the item, variant, and unit of measure level. When turned off, no date information is shown and no additional lookups are performed. For more information, see [Set up e-commerce](#).
- The e-commerce AI assistant can now answer questions about past and current orders, including the last time a specific item was ordered, order history within a specified date range (up to six months), details of a specific order or invoice by number, and which items are currently on order. For more information, see [E-Commerce AI assistant](#).
- A free-text **Comments** field is available on the e-commerce checkout page, allowing customers to enter special instructions or notes of up to 500 characters with their order. Comments are stored in Business Central as Sales Comment Lines associated with the sales order, and are visible in order and invoice history views in the e-commerce portal. When the Aptean [Advanced Comments](#) extension is installed, checkout comments are automatically configured to print on order confirmations and can optionally be configured to print on delivery notes using the **Print Checkout Comments on Delivery Note** toggle on the **E-commerce Setup** page. For more information, see [Review and finalize your order](#) and [Set up e-commerce](#).
- The **Entra Application Setup** action on the **E-commerce Setup** page automates the creation of the required Microsoft Entra Application record in Business Central and the assignment of all applicable permission sets to its virtual user account, replacing a manual multi-step process. For more information, see [Set up e-commerce](#).



Enhancements/Modifications

With this release of the Aptean E-Commerce extension, the **E-commerce Setup** page has been reorganised into logical FastTab groups — **Catalog**, **Ordering**, **Delivery & Scheduling**, and **Notifications & Documents** — to make configuration settings easier to locate and manage. For more information, see [Set up e-commerce](#).

UI/UX changes

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

- The **Entra Application Setup** action has been added to the **E-commerce Setup** page.
- The **E-commerce Setup** page has been reorganised into the following FastTabs: **Catalog**, **Ordering**, **Delivery & Scheduling**, and **Notifications & Documents**.
- The **Auto Release Ecom Orders** toggle has been added to the **Ordering** FastTab on the **E-commerce Setup** page.
- The **Admin Email** field has been added to the **Notifications & Documents** FastTab on the **E-commerce Setup** page.
- The **Show Last Order Date** toggle has been added to the **Catalog** FastTab on the **E-commerce Setup** page.
- The **Print Checkout Comments on Delivery Note** toggle has been added to the **Notifications & Documents** FastTab on the **E-commerce Setup** page. This toggle is visible only when the Aptean [Advanced Comments](#) extension is installed.
- The **Created From ECM** field has been added to the **Sales Comment Sheet** page in Business Central. The field is hidden by default and can be made visible through personalization.

Resolved issues

The following issues have been resolved in this release.

ID	Description
377074	The system displays the item category filter dropdown on the e-commerce product browsing page even when no item categories are assigned to the items in the customer's profile catalog.
377274	The system displays the reorder confirmation dialog when the shopping cart is empty, prompting the customer to confirm cart replacement even though the cart contains no items.



2602.1.321809.0

Release Note • 6/8/2026 • 2 min read

Features

With the feature added in this release of the Aptean E-Commerce extension, you can select the **View Permission Errors** button on the **Choose Site** page of the administration portal to view recent Business Central permission errors for the selected site, so you can identify which apps need permissions for the Entra user. For more information, see [Choose a site](#).

Enhancements/Modifications

With this release of the Aptean E-Commerce extension, you can turn off the **Allow Item Category Filtering** toggle on the **E-commerce Setup** page to hide the item category filter from the e-commerce product browsing page for all customers. The toggle is turned on by default, which keeps the existing filtering behaviour. For more information, see [Set up e-commerce](#).

UI/UX changes

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

- The **View Permission Errors** button has been added to the **Choose Site** page in the Admin Portal.
- The **Allow Item Category Filtering** toggle has been added to the **E-commerce Setup** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
375673	The system fails to update an existing sales quote when changes are submitted from the e-commerce portal, creating a new quote on every update and leaving the original quote orphaned in Business Central with its lines removed.
376312	The system fails to complete a reorder from the e-commerce portal when the hide delivery dates setting is enabled.
376448	The system fails to create an order when a partial (fractional) item quantity, such as 0.33, is entered in the e-commerce portal.



376696	The system fails to complete login on the Safari browser on macOS and iOS or in private/incognito mode for other browsers, redirecting the user back to the login page because third-party cookies are blocked.
376743	The system does not display any items on the profile page when the shopping cart references a ship-to address that is no longer valid in Business Central, because catalog items are requested using the outdated ship-to value.



2602.1.0.0

Release Note • 5/27/2026 • 3 min read

Enhancements/Modifications

With this release of the Aptean E-Commerce extension,

- You can turn on the **Hide Invoices Without Sales Order** toggle on the **E-commerce Setup** page to hide invoices from the e-commerce portal that are not linked to a sales order. When the toggle is turned on, invoices without a linked sales order are excluded from the invoice section on the **My Account Dashboard** page and from the **Invoiced Order Search** page. When the toggle is turned off (default), all invoices are displayed. For more information, see [Set up e-commerce](#).
- You can turn on the **Hide Customer PO No.** toggle on the **E-commerce Setup** page to hide the Customer PO number (External Document No.) during e-commerce checkout and on order, invoice, and quote information returned to the e-commerce portal. When the toggle is turned on, the checkout flow does not prompt the customer for a Customer PO number, and the value is omitted from order history, order detail, order confirmation, invoice, and quote displays in the e-commerce portal. When the toggle is turned off (default), the existing behaviour is unchanged. For more information, see [Set up e-commerce](#).

UI/UX changes

The **Hide Customer PO No.** and **Hide Invoices Without Sales Order** toggles have been added to the **E-commerce Setup** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
370012	The system incorrectly includes all invoice lines — including automatic packaging lines, Comment lines, and G/L Account lines — when reordering from a previous order or invoice through the e-commerce portal. Additionally, the system allows the Reorder action to be selected when no valid item lines exist on the source order or invoice.
371927	The system fails to display dates in the user's locale format on the e-commerce portal, showing dates in <i>MM/DD/YYYY</i> format for EMEA users regardless of the configured language.



371928	The system fails to persist the language selection made on the Dashboard page across logout and login in the same browser, reverting to a default locale on subsequent sessions.
373473	The system incorrectly center-crops tall or non-square product images to a square in the product profile and the item detail popup, hiding parts of the image content.
375342	The system incorrectly returns a mixed set of customer item catalog rows — combining sell-to and ship-to scopes — to the e-commerce portal when a customer has catalog rows assigned at both levels, causing the My Profile item list and keyword search results to display items that should be filtered out by the selected ship-to address.



2602.0.0.0

Release Note • 4/22/2026 • 4 min read

Features

With the features added in this release of the Aptean E-Commerce extension,

- You can view line-item details for invoiced orders directly on the **Order History** page. When you select an invoiced order, the invoice detail displays header information — including customer name, ship-to address, invoice date, due date, shipped date, purchase order number, total line items, and invoice balance along with a line items table showing the product, description, quantity, unit price, discount, and amount for each line. For more information, see [View order history](#).
- You can request document reports directly from the **My Account Dashboard** page. When the Aptean [Document Publication](#) extension is configured, select the **REPORTS** button to open the **Reports** dialog. The dialog lists available reports with their status and the dates they were last run and last completed. For more information, see [Request reports](#).
- You can send welcome emails to selected users directly from the **User management** page in the e-commerce administration portal. You can also control whether welcome emails are sent during CSV user import using the **Send welcome emails immediately?** checkbox in the import review dialog. For more information, see [Add new users](#).
- You can pay invoices directly from the e-commerce portal when the [Aptean Pay](#) extension is configured. A **PAY** button appears next to your account balance on the **My Account Dashboard** page to pay your full outstanding balance through the Aptean Pay payer portal. The **Pay** badges also appear in the invoice lists on the **My Account Dashboard** page and the **Order History** page for invoices with a remaining balance. You can also pay from the invoice detail view. Select a **Pay** badge to open the payment dialog, where you can pay as a guest using an embedded card form or open the payer portal in a new tab. For more information, see [Pay invoices](#).
- You can reorder items from previously completed orders directly from the e-commerce portal. A **Reorder** button appears in the invoice detail on the **Order History** page and in the order detail on the **My Account Dashboard** page. Select the **Reorder** button to set a delivery date and create a new sales quote with items repriced at current prices. For more information, see [Reorder orders](#).

Enhancements/Modifications

With this release of the Aptean E-Commerce extension, the welcome email, password reset email, and cart reminder email are sent as professionally designed HTML emails. The emails include the site's configured brand colors and logo, creating a consistent branded experience for customers. The email content including subject lines, body text, and call-to-action button text remains customizable through the **In-app text and translations** page in the e-commerce administration portal.



Integrations

The Aptean E-Commerce extension has been integrated with the Aptean [Document Publication](#) and [Aptean Pay](#) extensions. For more information, see [Integrations](#).

UI/UX changes

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

- The **Send welcome emails** action has been added to the **User management** page in the e-commerce administration portal.
- The invoice detail view has been added to the **Order History** page in the e-commerce portal.
- The **PAY** button has been added to the invoice detail view on the **Order History** page in the e-commerce portal.
- The **Reorder** button has been added to the invoice detail view on the **Order History** page in the e-commerce portal.
- The **Pay** column has been added to the **Order History** page in the e-commerce portal.
- The **REPORTS** button has been added to the **My Account Dashboard** page in the e-commerce portal.
- The **PAY** button has been added to the **My Account Dashboard** page in the e-commerce portal.
- The **Reorder** button has been added to the order detail view on the **My Account Dashboard** page in the e-commerce portal.
- The **Pay** column has been added to the **My Account Dashboard** page in the e-commerce portal.
- The **Document Publication Custom Category Code** field has been added to the **E-commerce Setup** page.
- The **Send welcome emails immediately?** checkbox has been added to the **Review Import** dialog in the e-commerce administration portal.

Resolved issues

The following issue has been resolved in this release.

ID	Description
353985	The system fails to prevent adding items with no price to the shopping cart through the AI assistant. Additionally, the system does not validate zero-priced items or items with negative quantities during order submission.



2601.3.0.0

Release Note • 3/25/2026 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
358996	The system incorrectly accepts new user phone numbers in the E-Commerce Admin Portal without a country code.



2601.2.0.0

Release Note • 2/25/2026 • 1 min read

UI/UX changes

The **Site Name** in **URL** field has been removed from the e-commerce admin portal.

Resolved issues

The following issue has been resolved in this release.

ID	Description
358726	The system fails to display all images on the E-Commerce Profile page when a single corrupted product image exists in Business Central.



2601.1.0.0

Release Note • 2/4/2026 • 2 min read

Enhancements/Modifications

With this release of the Aptean E-Commerce extension,

- The system prevents end-users from entering their own requested delivery date when starting their e-commerce orders. To know more, see [Set up site configuration](#).
- You can search for invoices on the **Order History** page using sales order or invoice number. This enhancement addresses the issue reported in bug ID #353242.

UI/UX changes

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

- The **Hide Delivery Date?** checkbox has been added to the **Site Configuration** page.
- The e-commerce chatbot button has been modified for a better appearance on mobile-sized screens.

Resolved issues

The following issues have been resolved in this release.

ID	Description
350314	The system incorrectly attempts to determine order cutoff time even if insufficient information is set on the Sales Call Plan Setup page leading to errors.
350647	The system fails to sort the items on the cart in newest to oldest item order.
348703	An error occurs when importing a CSV file with over 50 users in the e-commerce admin portal.
351331	An error occurs occasionally when searching for global e-commerce catalog items.
353242	The system incorrectly displays the text as <i>Sales Orders</i> instead of <i>Sales Invoices</i> on the Order History page in the e-commerce dashboard.
353956	The e-commerce chatbot incorrectly adds unpriced items to the shopping cart.



2601.0.0.0

Release Note • 1/28/2026 • 2 min read

Features

With the features added in this release of the Aptean E-Commerce extension, you can:

- Modify previously submitted sales orders that are in Open status directly from the E-Commerce portal without canceling and recreating them. To know more, see [Modify orders](#).
- Interact with an AI assistant to search for items, manage your cart, start orders, view order guidelines, and complete checkout through natural conversation. To know more, see [E-Commerce AI Assistant](#).

UI/UX changes

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

- The **Enable AI Assistant (Preview)** checkbox has been added to the **Site Configuration** page in the e-commerce administrator portal.
- A floating AI assistant message button has been added to all pages across the e-commerce portal. This is visible only when the **Enable AI Assistant (Preview)** checkbox is selected on the **Site Configuration** page.
- The **Edit Order** button has been added to the **Order Preview** page in the e-commerce portal.
- The current ship-to address and requested receiving date have been added as pills to the top of the **Item Profile** page in e-commerce.

Resolved issues

The following issues have been resolved in this release.

ID	Description
318525	The e-commerce platform incorrectly sends a cart reminder email to users with no items in their cart.
327679	The e-commerce platform incorrectly allows sales orders to be submitted after the cutoff time if the orders were started before the cutoff time.
340769	The system incorrectly displays the item view by default on the My Cart page in the e-commerce portal.
343788	The system incorrectly treats email addresses as case sensitive during account registration and login.



345435

The system incorrectly displays items on the **Order Entry – My Profile** page in the e-commerce portal in item number order instead of matching the sequence defined in the user's profile configuration.



2504.1.0.0

Release Note • 11/26/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean E-Commerce extension,

- The e-commerce portal layout has been updated to provide a more user-friendly experience on the Progressive Web App (PWA). The interface adapts more effectively to smaller screens, making navigation, and content viewing smoother across supported devices.
- You can select the **CLEAR CACHE** button on the **Choose Site** page to remove the JSON cache for the selected site, ensuring that the latest data is loaded in the user interface. The button is available to admin users and becomes editable only after a site name is selected.

UI/UX changes

The **CLEAR CACHE** button has been added to the **Choose Site** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
334634	The system fails to support the installation of the PWA when the e-commerce portal is hosted. Additionally, the PWA icon cannot be uploaded, and the installed app does not display the correct icon or name.
324726	A performance issue occurs in the e-commerce admin portal, leading to the absence of loading spinners and visual feedback when the user updates, saves, or performs user-creation actions.
332130	The system incorrectly displays duplicate items on the Order Entry – My Profile page.
332131	The system incorrectly retains the old delivery date from the existing sales quote and fails to apply the newly selected date, resulting in an outdated delivery date on the newly created sales order.
333463	The system fails to display duplicate orders by showing only one duplicate per page in the warning message, even when multiple duplicate orders exist.



2504.0.0.0

Release Note • 10/22/2025 • 3 min read

Features

With the features added in this release of the Aptean E-Commerce extension,

- You can easily obtain official Business Central invoices for previous orders directly from the **Order History** page. This allows you to receive a PDF copy of your invoice via email without needing to contact customer service. To know more, see [View order history](#).
- The system checks whether an order already exists for the same ship-to address and delivery date when creating a new order. If such an order exists, a confirmation message appears to help you avoid creating duplicate orders. To know more, see [Place a new order](#).
- The system displays clear indicators and messages for catch weight items throughout your shopping experience, from browsing products to completing checkout.
- The e-commerce portal supports installation as a Progressive Web App (PWA) on mobile and tablet devices. You can add the portal to the home screen, launch it in full-screen mode, and access all key features, such as product search, cart, checkout, account details, and order history, through a seamless mobile experience.

UI/UX changes

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

- The **Email Invoice** field has been added to the **Order History** page.
- The **Upload new logo (PWA)** field has been added to the **Site Configuration** page.
- The Information icon has been added to the price of all catch weight items throughout the e-commerce portal.

Resolved issues

The following issues have been resolved in this release.

ID	Description
324723	The system fails to update the value in the Customer field on the Add new user window when a customer name is updated in Business Central. Additionally, the system fails to sort the records alphabetically.



330570	The system displays an incorrect delivery date on the My Card and Order Recap pages when an order is created around 12:00 AM (local time) in time zones ahead of UTC.
324725	The system fails to refresh the calendar on the Home page to display newly created orders due to cached data.
325058	The system displays an invalid language option, <i>English (United Kingdom)</i> , in the Language field on the App Strings , Site Configuration , and My Account Dashboard pages. This issue occurs when the browser language is set to <i>en-GB</i> .
326605	The system incorrectly increases the total price of a quote when the same cart is submitted multiple times in the e-commerce portal.
329188	An error occurs while fetching items from Business Central causing the interface to reload, preventing normal use.
329542	The system fails to import user records from CSV files on the User management page when names contain commas.
329862	The system fails to fetch all items when updating the Delivery Date field value on the Order Entry window.



2503.0.0.0

Release Note • 9/24/2025 • 4 min read

Features

With the features added in this release of the Aptean E-Commerce extension,

- You can configure additional email recipients, such as sales people or administrative contacts, in the **Additional email recipients** field, to send order confirmation emails. This ensures that all stakeholders are automatically notified when orders are placed, improving visibility and follow-up. Additionally, the primary salesperson of the customer is automatically included as a recipient when the **Send confirmation email to customer salesperson** toggle on the **E-commerce Setup** page is turned on. To know more, see [Set up e-commerce](#).
- Admin users can control whether customers are allowed to cancel their orders directly from the e-commerce portal. This setting helps you maintain control over the fulfillment process when needed. To know more, see [Set up site configuration](#).
- You can search for items on the e-commerce portal using the internal item reference numbers of your company. These internal reference numbers are also displayed for each item. To know more, see [Profile items section](#).
- The **Site Name in URL** field allows vendors or admins to create a company-specific URL for the e-commerce portal. This ensures customers have access to a personalized **Login** page with the branding of their company. To know more, see [Set up site configuration](#).

Enhancements/Modifications

With this release of the Aptean E-Commerce extension,

- Email addresses are automatically trimmed of extra spaces, allowing users to log in even if spaces are included before or after the address. This enhancement addresses the issue reported in bug ID #321977.
- The **Created by E-Commerce Email** field on the **Sales Quote** page has been made obsolete. This modification addresses the issue reported in bug ID #321984.

UI/UX changes

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

- The **Additional Email Recipients** field and the **Send confirmation email to customer salesperson** toggle have been added to the **E-commerce Setup** page.
- The **Site Name in URL** field has been added to the **General** section of the **Site Configuration** page.



- The **Allow Cancelling Orders?** toggle has been added to the **Site Configuration** page in the e-commerce portal.
- The caption of the **CONFIG & THEME** tab has been renamed to **SITE CONFIGURATION** on the **Ecom Administration** dashboard.
- The caption of the **CONFIGURE COMPANY...** button has been renamed to **CONFIGURE COMPANY** on the **Site configuration** page.
- The **Allow same day delivery?** toggle has been removed from the **Configure (company name)** page and added to the **E-commerce Setup** page.
- If a customer-specific item reference number is defined, the system displays it as a badge for each item on the **Order Entry – My Profile** page. The badge is shown based on the specified start and end dates on the **Item References** page.
- The **Created by E-Commerce Email** field on the **Sales Quote** page has been made obsolete.

Resolved issues

The following issues have been resolved in this release.

ID	Description
321977	The system prevents users from logging in to the e-commerce portal if their email address contains leading or trailing spaces.
323498	The system fails to remove the canceled orders from the Home or Order History page.
321984	The system does not display a value in the Created by E-Commerce Email field on the Sales Quote page.
322796	The system incorrectly displays <i>Your password has been created successfully</i> message after a new user is created, although the user must still use the password reset link from email to set a password.
320220	The system incorrectly displays the Allow same day delivery? toggle on the Site Configuration page.
321975	The system allows users to interact with the Order Entry – My Profile page while the Order Entry window is open, instead of displaying a loader and blocking interaction.



2502.1.0.0

Release Note • 8/27/2025 • 2 min read

Enhancements/Modifications

With this release of the Aptean E-Commerce extension,

- Only a subset of your catalog items is loaded initially on the **Order Entry – My Profile** page, and additional items are fetched incrementally as you scroll or navigate through your profile. This enhances performance and reduces load times for large catalogs. To know more, see [Set up e-commerce](#).
- As an admin user, you can automatically block users who have been inactive for a specified period. To know more, see [Set up site configuration](#).
- As an admin user, manually block or unblock users in the e-commerce platform without deleting their accounts. To know more, see [Edit user configuration](#).
- The system stores the email address of the user who submits an order. This email is captured on the sales header and posted sales invoice documents, allowing internal users and support teams to identify the front-end user responsible for each transaction. To know more, see [Add new users](#).
- The CSV import user process has been enhanced to provide clearer formatting guidance, visual feedback during imports, and improved handling of empty rows when importing users into the e-commerce platform.

UI/UX changes

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

- The **Specify how many catalog items to fetch at a time** field has been added to the **E-commerce Setup** page.
- The **E-Commerce User Email** field has been added to the following pages:
 - Sales Orders
 - Sales Order
 - Posted Sales Invoices
 - Posted Sales Invoice
- The **Automatic User Inactivation** section has been added to the **Site Configuration** page in the e-commerce portal.
- The **Inactive** checkbox has been added to the **Edit user** window associated with the **User management** page in the e-commerce portal.



Resolved issues

The following issue has been resolved in this release.

ID	Description
315886	The system assigns incorrect delivery routes when selecting a ship-to address on the Order Entry window. Instead of combining route entries from both the specific location code and the blank location code in the transportation route assignment, the system picks a route that closely matches the warehouse location.



2502.0.0.0

Release Note • 7/30/2025 • 2 min read

Features

With the features added in this release of the Aptean E-Commerce extension,

- As an admin user, you can import multiple customer contacts and create user accounts using a CSV file. This helps you save time and effort by avoiding manual data entry. To know more, see [Import e-commerce users from a CSV file](#).
- The system uses the **Created by E-Commerce** toggle to distinguish sales documents created through the e-commerce platform. This allows you to easily identify, filter, or report on sales documents that originates from the e-commerce portal.
- The system sends a welcome email for the e-commerce platform that includes a secure link, allowing you to set your password at any time, even after the original invitation expires.

Enhancements/Modifications

With this release of the Aptean E-Commerce extension,

- The delivery date and cutoff time calculations are based on the location code. If the selected ship-to address does not have a location code, the system automatically uses the location code on the **Customer Card** page. This ensures accurate delivery estimates even when the ship-to address is incomplete.
- You can view all available items from multiple catalogs in your e-commerce account if your customer record in Business Central is linked to more than one item catalog. This enhancement provides full visibility into the products you can browse and order, even if they belong to different catalogs.

UI/UX changes

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

- The **IMPORT USERS** button has been added to the **User management** page.
- The **Created by E-Commerce** toggle has been added to the following pages in Business Central.
 - Sales Quote
 - Sales Order
 - Sales Invoice
 - Posted Sales Invoice



Resolved issues

The following issues have been resolved in this release.

ID	Description
306573	The system incorrectly creates and retains duplicate quote records during checkout, leaving the original quote abandoned after order submission.
306992	The system incorrectly retains an empty quote in Business Central instead of deleting it when all items are removed from the cart.



2501.0.0.0

Release Note • 7/2/2025 • 3 min read

Features

With the features added in this release of the Aptean E-Commerce extension, you can:

- Define delivery calendars, assign item catalogs, restrict delivery dates by routes, enforce minimum order requirements, and manage cancellation and catalog access settings on the **E-commerce Setup** page in Business Central. This helps to optimize customer ordering experience and streamline backend processes. For more information, see [Set up e-commerce](#).
- Gain control over the e-commerce portal with enhanced admin capabilities. You can configure and manage your e-commerce portal through a centralized admin dashboard, set up site configurations, customize themes, manage in-app texts and user permissions, all designed to deliver a seamless online experience that aligns with your business goals. For more information, see [Admin users](#).
- Customize site branding and communication settings. Admin users can upload logos, set theme colors, configure announcements, update contact info, and link the e-commerce portal to the desired Business Central company. For more information, see [Set up site configuration](#).
- Design company-specific e-commerce experiences by enabling same-day delivery and create marketing catalogs with custom images, messages, display styles, and actions, all specific to each company, giving admins greater flexibility to tailor customer experience without impacting other environments. For more information, see [Configure company settings](#).
- Manage user access by creating new users or admins directly from the e-commerce administration portal. For more information, see [Add new users](#).
- Localize user-facing content effortlessly. You can edit in-app labels and manage translations across supported languages to deliver a tailored user experience. The system simplifies localization by allowing admins to customize the interface text without any development effort, ensuring content stays relevant and accessible for global audiences. For more information, see [In-app text and translations](#).
- Monitor and manage shopping carts in real time. Admins can abandon carts, track cart activity, view product-level details, and remove unwanted carts. For more information, see [Manage shopping carts](#).
- Simplify online ordering for end users. The system offers regular users a seamless experience to browse product catalogs, manage their carts, choose delivery dates, and place orders with ease. For more information, see [E-Commerce users](#).
- Stay informed with orders and announcements briefly. You can quickly access order updates and important messages from the **Home** page of the e-commerce portal. For more information, see [View orders and announcements](#).



- Ensure compliance with minimum order requirements. The system prevents order submission below required thresholds with built-in minimum order enforcement. For more information, see [Access your shopping cart](#).
- Review the final overview and submit your order from the **Checkout** page. For more information, see [Review and finalize your order](#).
- View a complete summary of your submitted order. You can access the **Order Recap** page immediately after submission to review full order details, including customer and shipping information, delivery dates, order status, and item-level breakdowns with pricing and quantities. For more information, see [View submitted orders](#).
- Cancel sales orders directly from the portal. Based on the order status and admin-defined cancellation rules, the system deletes eligible orders, preventing unwanted shipments. For more information, see [Cancel orders](#).
- Track account activity with a personalized dashboard and access key account details, recent orders, open invoices, and language preferences on the **My Account Dashboard** page. For more information, see [View account details](#).
- Use the **Order History** page to search and view invoiced orders by delivery date or sales order number. For more information, see [View order history](#).

Integrations

The Aptean E-Commerce extension has been integrated with the following extensions:

- Aptean [Call Plan](#)
- Aptean [Transport](#)
- Aptean [Order Minimums](#)

For more information, see [Integrations](#).



Introduction

Article • 7/2/2025 • 1 min read

The Aptean E-Commerce (ECM) extension for Microsoft Business Central is designed to help businesses deliver a seamless, self-service online ordering experience. This extension simplifies order management by connecting business operations directly with customer needs in real time and is tailored for industries like food and beverage distribution and retail.

With rising expectations for transparency, speed, and flexibility in B2B commerce, companies need tools that reduce manual intervention, enforce order accuracy, and enhance customer confidence. The Aptean E-Commerce extension meets these needs by providing an intuitive platform where customers can:

- Browse personalized product catalogs
- Select delivery dates and ship-to locations
- Apply smart filters and update item quantities easily
- Review order summaries and track shipments
- Access account information, invoices, and order history, all in one place

The platform also supports multilingual environments, automated order confirmations, and configurable order controls, enabling businesses to streamline fulfillment while offering customers greater visibility and control.

By integrating seamlessly with Business Central, this solution ensures accurate data flow between internal teams and external customers, helping companies reduce overhead, improve order efficiency, and stay competitive in fast-paced markets.



Setup

Article • 7/2/2025 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up e-commerce](#)



Manage permission sets

Article • 7/2/2025 • 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 *ECOMMERCE160FDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets and typically involves additional conditions or approvals before an action can be completed.

The indirect permission set ID for this extension is *ECOMMERCEBASIC160FDW*.

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 E-Commerce extension, ensuring secure and role-based access.



Set up e-commerce

Article • 7/22/2026 • 10 min read

The **E-commerce Setup** page in Business Central controls how the e-commerce portal behaves for customers and administrators. Settings are organised into four FastTabs — **Catalog**, **Ordering**, **Delivery & Scheduling**, and **Notifications & Documents** — to make configuration easier to locate and manage.

To access the **E-commerce Setup** page:

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

Catalog FastTab

On the **Catalog** FastTab, enter the required information in the following fields:

Field	Description
Global Catalog	Select the item catalog that defines the default set of items that users can search for and order on the e-commerce portal. This field is linked to the Item Catalogs page in Business Central and represents the globally available and searchable items for all users.
Restrict E-Commerce to Catalog	Turn on the toggle to limit users to viewing and ordering only the items available in their assigned item catalog. When turned on, users cannot search for or access items from the global catalog. The restriction can be overridden for specific customers on the Customer Card page using the Restrict E-Commerce to Catalog field. The available options are: <i>Default</i> (uses the global setting), <i>No</i> (allows access to the full catalog), and <i>Yes</i> (restricts to the assigned customer catalog).
Specify how many catalog items to fetch at a time	Enter the number of catalog items to load on the Order Entry – My Profile page. By default, this value is set to <i>50</i> , and any number from <i>10</i> to <i>200</i> can be entered. Lower values load fewer items per batch, which can improve performance for large catalogs or slower connections.
Show Last Order Date	Turn on the toggle to display the last date on which the customer ordered each item on their profile catalog in the e-commerce portal. When turned on, each item displays <i>Last ordered: [date]</i> based on open sales orders and posted sales



	history, at the item, variant, and unit of measure level. When turned off, no date information is shown and no additional order history lookups are performed.
Hide Invoices Without Sales Order	Turn on the toggle to hide invoices from the e-commerce portal that are not linked to a sales order. An invoice is considered linked when the source sales order number is recorded on the posted invoice. When the toggle is turned on, invoices without a linked sales order are excluded from the invoice section on the My Account Dashboard page and from the Invoiced Order Search page. When the toggle is turned off (default), all invoices are displayed.
Allow Item Category Filtering	Turn on the toggle to allow customers to filter items by item category on the e-commerce product browsing page. This toggle is turned on by default. When turned off, item category filter options are hidden from the e-commerce interface for all customers.

Ordering FastTab

On the **Ordering** FastTab, enter the required information in the following fields:

Field	Description
Allow Cancelling Released Orders	Turn on the toggle to allow users to cancel sales orders that have already been released in Business Central through the e-commerce portal. This setting applies only to released orders — all users can cancel open orders by default. Orders already linked to shipments cannot be cancelled regardless of this setting. The global cancellation setting can be overridden for individual customers on the Customer Card page. The available options are: <i>Default</i> (uses the global setting), <i>No</i> (prevents cancellation of released orders), and <i>Yes</i> (allows cancellation of released orders).
Enable order minimum enforcement in E-Commerce	Turn on the toggle to ensure minimum order requirements are met before submitting an order through the e-commerce portal. When turned on, the system checks the total value of the cart at checkout against the order minimums defined on the Order Minimums page in Business Central. If the order falls below the required minimum, the customer is prevented from placing the order. This toggle is turned on by default. This toggle is



	accessible only when the Aptean Order Minimums extension is installed. For more information, see Minimum order requirements during checkout .
Auto Release Ecom Orders	Turn on the toggle to automatically release sales orders created from the e-commerce checkout flow using the standard Business Central release functionality. When turned on, orders transition directly to <i>Released</i> status after checkout. When release fails due to a blocked customer, inventory issue, or other validation error, the order remains in <i>Open</i> status and an email notification is sent to the address in the Admin Email field (if configured). When a released order is subsequently modified through the e-commerce portal, the order is automatically reopened, modified, and re-released. Release failures are not visible to customers. When turned off (default), orders remain in <i>Open</i> status after checkout.
Hide Customer PO No.	Turn on the toggle to hide the Customer PO number (External Document No.) during e-commerce checkout and on order, invoice, and quote information returned to the e-commerce portal. When turned on, the checkout flow does not prompt the customer for a Customer PO number, and the value is omitted from order history, order detail, order confirmation, invoice, and quote displays in the e-commerce portal. When turned off (default), the Customer PO field is shown during checkout and on order displays. If a sales order already has a value in the PO No. field in Business Central — for example, because it was entered by an internal user before the toggle was turned on — modifying that order from the e-commerce portal does not clear the existing PO No. value.

Delivery & Scheduling FastTab

On the **Delivery & Scheduling** FastTab, enter the required information in the following fields:

Field	Description
Delivery Calendar	Select a base calendar that defines which dates are valid for deliveries across the e-commerce portal. This field is linked to the Base Calendar page in Business Central and helps prevent users from selecting non-working days such as holidays or weekends.
Delivery Horizon	Enter the number of days into the future that users can see and select as available delivery dates. The default value is <i>14</i> . The value must be greater than <i>0</i> .
Allow same day delivery	Turn on the toggle to allow customers to place same-day delivery orders. When turned off, customers cannot select the current date as the requested delivery date during checkout.



Routing Restricts Delivery Dates

Turn on the toggle to limit delivery date selection based on transport route assignments. When turned on, the system checks the assigned transport route of the customer to determine valid delivery days. For example, if a customer is scheduled to receive deliveries only from Monday to Wednesday, dates from Thursday to Sunday are unavailable in the delivery calendar. When turned off, the system does not consider transport routes. This toggle is accessible only when the Aptean [Transport](#) extension is installed.

Notifications & Documents FastTab

On the **Notifications & Documents** FastTab, enter the required information in the following fields:

Field	Description
Additional email recipients	Enter one or more email addresses (in addition to the customer email) to receive order confirmation emails. Separate multiple email addresses with commas or semicolons.
Admin Email	Enter the email address that receives notification emails when automatic release of e-commerce sales orders fails. This field is used only when the Auto Release Ecom Orders toggle is turned on.
Send confirmation email to customer salesperson	Turn on the toggle to automatically include the customer's primary salesperson as a recipient of order confirmation emails.
Document Publication Custom Category Code	Select or enter the document publication custom category code to filter the reports available to e-commerce customers. Only reports with a custom usage assigned and this category code are displayed on the My Account Dashboard page in the e-commerce portal. This field is available only when the Aptean Document Publication extension is installed.
Print Checkout Comments on Delivery Note	Turn on the toggle to configure checkout comments entered through the e-commerce portal to print on delivery notes. When the Aptean Advanced Comments extension is installed, checkout comments are automatically configured to print on order confirmations. Turning on this toggle additionally configures them to print on delivery notes. This field is visible only when the Aptean Advanced Comments extension is installed.



Set up the Microsoft Entra Application

The **Entra Application Setup** action on the **E-commerce Setup** page automates the creation of the required Microsoft Entra Application record in Business Central and the assignment of all applicable permission sets to its virtual user account.

To set up the Microsoft Entra Application, follow these steps:

1. Select the Search icon , enter **E-commerce Setup**, and then choose the related link.
2. Select the **Entra Application Setup** action.
The **Entra Application Setup** dialog opens.
3. In the **Live connection** field, specify whether this is a production environment.
 - Turn on the **Live connection** toggle for production environments where real sales orders are processed.
 - Turn off the **Live connection** toggle for UAT or demo environments.
4. Select **OK**.
A confirmation prompt appears.
5. Select **Yes** to continue.
The action creates the Microsoft Entra Application record (named *Aptean BC Ecom Middleware*) in Business Central if it does not already exist, and assigns all required permission sets to the application's virtual user. Permission sets for extensions that are not installed in the environment are silently skipped.
6. After the setup completes, select **Yes** when asked whether to open the Entra Application card.
The **Entra Application Card** page opens.
7. On the **Entra Application Card** page, complete the Grant Consent step manually.

Note

- If the action is cancelled at the confirmation prompt, no changes are made to any Business Central records.
- If an error occurs during the action, all changes are rolled back and the offer to open the Entra Application card is not presented.



Set up e-commerce reports

Article • 4/22/2026 • 2 min read

You can make business reports available to e-commerce customers using the Aptean [Document Publication](#) extension. Reports configured with the *Custom* usage and a designated category code appear on the customer's **My Account Dashboard** page in the e-commerce portal, where they can request them and receive them by email.

Note

The Aptean [Document Publication](#) extension must be installed and configured for this feature to be available.

Prerequisites

Before setting up e-commerce reports, complete the following steps in the Aptean Document Publication extension:

- Set up custom categories and note the category code you want to use for e-commerce reports. All e-commerce reports share one category code. For more information see [Set up custom categories](#).
- Set up the reports you want to make available to customers. For more information see [Set up document publication reports](#).

Configure report selections for all customers

To make reports available to all e-commerce customers, follow these steps:

1. Select the Search icon, enter *Document Publication Report Selection*, and choose the related link.
The **Document Publication Report Selection** page opens.
2. Select an empty line and enter information in the following fields:

Field	Value
Usage	Select <i>Custom</i> .
Report ID	Select the report to make available to customers.
Output By	Select <i>Document Publication</i> .
Output Type	Select <i>Email</i> .
Process By	Select <i>User</i> .
Publish	Select the Publish checkbox.



Dialog	Clear the Dialog checkbox.
Custom Category Code	Select the category code created for e-commerce reports.

3. Repeat step 2 for each report you want to make available to all e-commerce customers.

Configure report selections for individual customers

Individual customers can have their own exclusive reports that other customers cannot see. To make reports available to a specific customer, follow these steps:

1. Select the Search icon, enter *Document Publication Layouts*, and choose the related link.
The **Document Publication Layouts** page opens.
2. Select an empty line and enter information in the following fields:

Field	Value
Source Type	Select <i>Customer</i> .
Source No.	Select or enter the number of the customer with access to this report.
Usage	Select <i>Custom</i> .
Report ID	Select the report to make available to the customer.
Output By	Select <i>Document Publication</i> .
Output Type	Select <i>Email</i> .
Process By	Select <i>User</i> .
Publish	Select the Publish checkbox.
Dialog	Clear the Dialog checkbox.
Custom Category Code	Select the category code created for e-commerce reports.

3. Repeat step 2 for each report you want to make available to individual e-commerce customers.

Assign the category code to e-commerce

To link the report category to the e-commerce portal, follow these steps:

1. Select the Search icon, enter *E-commerce Setup*, and choose the related link.



2. In the **Document Publication Custom Category Code** field, select the category code created for e-commerce reports.

 Note

The **Document Publication Custom Category Code** field is only visible when the Aptean [Document Publication](#) extension is installed. When the field value is left blank, no reports are available to e-commerce customers and the **REPORTS** button is hidden on the **My Account Dashboard** page.



Overview of the e-commerce site and its user roles

Article • 7/2/2025 • 1 min read

The e-commerce platform allows businesses to browse products, place orders, and manage their purchases online. It connects directly with Business Central to provide real-time access to inventory, pricing, and customer-specific information.

This platform connects businesses, such as customers (for example, La Fiesta Restaurant), with a vendor (for example, Fresh Foods Distribution) to facilitate online ordering and order management. While the vendor and customer represent companies, two types of users interact with the platform.

The following table outlines their roles and responsibilities.

Role	Description	Responsibility
Admin	An internal staff member with the vendor (for example, Fresh Foods Distribution).	Configures the e-commerce portal, manages settings, and links users to customer accounts.
User	A representative of a customer organization to place orders (for example, La Fiesta Restaurant).	Logs in to the portal to place and tracks orders on behalf of a customer organization.



Admin users

Article • 7/2/2025 • 2 min read

Admin users are responsible for configuring and managing the e-commerce portal. After logging into the e-commerce administration portal, admin users can set up site configurations, manage in-app text and translations, enable or restrict features, such as abandoned cart notifications. These settings ensure that the e-commerce experience aligns with business rules and customer needs.

Admin user login

You can access and manage your assigned e-commerce portal settings as an admin. Before proceeding, ensure that your credentials have been created and the integration with Business Central is appropriately configured.

To log in as an admin, follow these steps:

1. Open the preferred browser.
2. Go to the e-commerce administration **Login** page.
3. In the **Email address** field, enter your email ID.
4. In the **Password** field, enter your password.
5. Select **SUBMIT** to proceed with your credentials.

The admin log in is complete. If the login fails, the system displays an error message.



Access the e-commerce administration dashboard

Article • 10/10/2025 • 1 min read

After you log in, the **Ecom Administration** dashboard opens.

On the upper side of the dashboard, you can view the following elements:

- Company logo displayed on the upper left.
- Site configuration details, including the site ID, site name, and hosting environment.
You can select this description to navigate to the **Home** page.

On the navigation bar, you can view the following tabs:

- **SITE CONFIGURATION**: Customize the configuration settings and apply themes.
- **USERS**: Manage user accounts and permissions.
- **IN-APP TEXT AND TRANSLATIONS**: Edit labels and translations.
- **CARTS**: Manage cart-related settings.

You can also select the **LOG OUT** button in the header to securely log out of the portal.



Choose a site

Article • 6/8/2026 • 3 min read

To configure a specific site, follow these steps:

1. In the **Choose site** section, in the **Site** field, select the available environments from the dropdown.
You can only view the sites you are authorized to access based on your credentials and company settings.
2. Select **SUBMIT**.
The system loads the configuration settings for the selected site.
The **Site Configuration** page opens.

Note

You can select the **CLEAR CACHE** button to remove the JSON cache for the selected site, ensuring that the latest data is loaded in the user interface. This button is available to admin users and becomes editable only after a site name is selected.

View permission errors

Permission errors occur when an installed app does not have sufficient permissions to complete an action in Business Central. You can review the recent permission errors for a site to identify which apps to add as additional permissions for the Entra user.

1. In the **Choose site** section, in the **Site** field, select a site.
The **View Permission Errors** button is enabled once a site is selected.
2. Select the **View Permission Errors** button.
A pop-up window opens listing the permission-related log entries for the selected site from the last 7 days, newest first. Each entry shows a **Timestamp** and the Business Central error **Message** (including the blocked object and the correlation ID).

Note

The **View Permission Errors** button is available to administrators of the selected site. When there are no permission errors for the site in the last 7 days, the window shows an empty state message.



Set up site configuration

Article • 2/25/2026 • 6 min read

The **CONFIG & THEME** tab of the e-commerce administration portal allows admin users to customize branding, contact information, announcements, and order guidelines for the e-commerce portal. This tab also includes visual settings, such as theme colors and logo, and functional configurations linked to Business Central companies.

 Note

You must be an admin user to access the **SITE CONFIGURATION** tab.

To update site configuration settings, follow these steps:

1. On the **Ecom Administration** page, select **SITE CONFIGURATION**.
The **Site Configuration** page opens.
2. In the **General** section, enter the required information in the following fields:

Field	Description
Upload new logo	Upload an image file to display the company logo across the e-commerce portal. Select the appropriate image file from your system.
Upload new logo (PWA)	Upload the image to be used as the mobile app icon for the Progressive Web App (PWA). This icon appears on the device home screen after the e-commerce portal is installed as a PWA.
Primary Theme Color	Specify the main color theme of the portal. You can manually enter a HEX code or use the color picker to select a color that reflects your brand.
Secondary Theme Color	Specify the secondary accent color used on the portal. You can manually enter a HEX code or use the color picker to select a color.
Site Name	Enter the name of the e-commerce site. This identifies the business or instance being configured.
Description	Enter a short description of the site to help distinguish it from other site configurations.
Customer Service Email Address	Enter the customer service or support team email address that users can contact for help.
Customer Service Phone No.	Enter the customer support phone number, including the country code.



Announcements	Enter a message or alert that should appear on the Home page. For example, <i>We will not be taking orders on February 17th, 2025.</i>
Privacy policy URL	Enter the URL of your company privacy policy for display on the e-commerce portal.
Company	Select the Business Central company that this site is associated with. This links the portal configuration to the backend data of Business Central.

3. On the **Order Settings** section, select the **Allow Cancelling Orders?** checkbox to allow customers to cancel their orders using the **Cancel** button associated with each order on the **Home** page. This checkbox is selected by default.

When the checkbox is cleared, the system hides the **Cancel** button for orders on the **Home** page.

4. Select the **Hide Delivery Date Selection?** checkbox to prevent customers from selecting a requested delivery date for their orders. When checked, the system hides the **Delivery Date** field when creating a new order in the e-commerce portal. The system sets the delivery date in Business Central to the earliest valid delivery date based on existing business rules.

5. In the **Abandoned Cart Settings** section, enter the required information in the following fields:

Field	Description
Send users emails about abandoned carts?	Turn on this toggle to automatically send reminder emails to users who have left items in their cart without checking out.
Hours abandoned before sending email	Enter the number of hours after which a cart is considered abandoned. The system begins monitoring carts and automatically sends reminder emails to users after their carts remain inactive for the specified duration.

You can also customize the subject and message of the reminder email through the **App Strings** page via the **IN-APP TEXT AND TRANSLATIONS** tab. If no custom values are defined, the default subject and message are used.

The following option IDs can be used to personalize email.

- *Text_Abandoned_Email_Subject*
- *Text_Abandoned_Email_Body*

For more information, see [In-app text and translations](#).

6. In the **Automatic User Inactivation** section, in the **Automatically mark users inactive?** field, enter the number of days of inactivity. Regular users who have not logged in within this period are automatically blocked. This ensures that accounts with no recent activity are restricted from logging in.

Admin users can manually unblock any user at any time by selecting the **Inactive** checkbox on the **Edit user** window associated with the **User management** page.



7. In the **AI Assistant Settings** section, select the **Enable AI Assistant (Preview)** checkbox to allow you to access the e-commerce AI assistant. For more information, see [E-commerce AI assistant](#).

 Important

The E-commerce AI assistant is currently released as a preview feature and is still learning. It may occasionally provide incorrect information or make mistakes. Your feedback helps Aptean improve this feature.

Configure site guidelines

You can display important messages, such as order deadlines or service hours, on the portal **Home** page using the **Guidelines** section.

To add, edit, or remove guidelines in your preferred language, follow these steps:

1. In the **Guidelines** section, in the **Language** field, select the required language in which the guidelines should be displayed.

The available options are: *English (United States)*, *Spanish (Spain)*, *Danish (Denmark)*, *German (Germany)*, *French (France)*, *Dutch (Netherlands)*, and *Swedish (Sweden)*.

2. Select the **ADD ROW** button to create a new guideline.

In the new row:

- In the **Guideline** field, enter the guideline text that appears on the portal **Home** page, such as order deadlines or service hours (for example, *All support requests will be addressed within 24 hours*). As you add rows, the system displays the field name as **Guideline 1**, **Guideline 2**, and so on.
- In the **Icon** field, select a symbol that visually represents the guideline, such as *Clock*, *Dollar*, *Question*, *Sun*, or *Phone*, to represent the guideline.
- Select the **REMOVE** button to delete the respective guideline row from the configuration.

3. Select **SAVE CONFIGURATION**.

A notification appears to confirm that your settings have been saved.

 Note

You can select the **RETURN TO SITE CONFIG** button to open the **Site Configuration** page.



Configure company settings

Article • 10/10/2025 • 3 min read

As an admin, you can configure company-specific e-commerce settings, such as enabling same-day delivery and managing marketing items. These configurations are specific to the selected company and do not affect other companies connected to the portal.

To configure company settings, follow these steps:

1. Select the **SITE CONFIGURATION** tab.
2. On the **Site configuration** page, select **CONFIGURE COMPANY**.

The **Configure (company name)** page opens.

Set up marketing catalogs

Use the **Marketing** section to create custom catalogs that promote specific items or offers to your customers. These catalogs are displayed as interactive tiles on the **Order Entry – My Profile** page, allowing users to easily explore and purchase featured items.

To set up marketing catalogs, follow these steps:

1. In the **Marketing** section, select the **ADD ROW** button to add a new catalog for marketing items.
You can create your own catalog to market products to customers or users.
2. Enter the required information in the following fields:

Field	Description
Upload image	Upload a marketing image from your local system. This image is displayed as a cover picture of the catalog created on the Order Entry – My Profile page.
Title	Enter the headline text to be displayed in the catalog for the marketing items.
Text	Enter supporting content or promotional message.
Page	Select where the catalog or marketing items are displayed. Currently, the system supports the <i>PROFILE</i> option.
Style	Select the required option to configure how the item should be styled. Currently, the system supports the <i>LIST_OF_MANY</i> option. Then, the marketing items are displayed as lists on the Order Entry – My Profile page.
Action	Select the required option to define what happens when the item is selected. The available options are:



	• CATALOG: To open a specific catalog for the marketing items. • WEB_LINK: To redirect the user to a different website, typically to promote a deal or provide additional information.
Catalog code	Select the required item catalog code from the dropdown. These catalog codes are fetched based on the configuration from the Item Catalogs page in Business Central. For more information, see Create and manage catalog items and Set up item catalog . This field is editable only when the Action field value is set to CATALOG .
Web link	Enter the URL for redirection. This field is accessible only when the Action field value is set to WEB_LINK .
DELETE	Select to delete the catalog configuration.

3. Select **SUBMIT**.

The system saves the catalog configuration.

Note

To return to the **Site configuration** page, select the **RETURN TO SITE CONFIG** button.

After these setups, the configured catalog is displayed as separate tiles with the specified title on the **Order Entry – My Profile** page.

When you select the catalog tile, the page opens with the specified title and the list of items configured for the item catalog code on the **Item Catalogs** page in Business Central. If the catalog is configured with a web link instead, the customer is redirected to the specified external website.



Manage users

Article • 8/27/2025 • 2 min read

As an admin, you can add users manually or select existing contacts from Business Central using the e-commerce administration portal. This functionality helps to manage user access across connected customer environments.

On the **Ecom Administration** page, select **USERS**.

The **User management** page opens.

You can view a list of existing users and their details in the following fields:

Field	Description
Role	Specifies whether the person is an admin or a regular user. This controls access permissions. Ensure that only employees of the vendor should be assigned the admin role, as admins can configure and access system settings. Admin users should not represent customers.
Customer	Specifies the name of the customer or company associated with the user.
Name	Specifies the name of the admin or user for identification.
Email	Specifies the email address of the admin or user for identification.
Phone	Specifies the contact number of the admin or user.
Created	Specifies the created timestamp when the user account was created.
Last login	Specifies the most recent login date and time for tracking user activity.
Block icon	Specifies whether a user ID is currently blocked.

The following actions are available on tables throughout the e-commerce portal to help you customize and manage data effectively.

Action	Description
Columns	Allows you to choose which columns are displayed on the table.
Filters	Allows you to apply filter criteria, such as showing only administrator records, based on the values you specify.
Density	Allows you to adjust the row spacing of the table view, for example, from compact to comfortable.



 Note

Use the search bar to filter the required information from the user management list by entering the details or keywords.



Add new users

Article • 4/22/2026 • 6 min read

To add a new user to the portal, follow these steps:

- 1. On the **User management** page, select the **ADD NEW USER** button.
The **Add new user** window opens.

- 2. Enter the required information in the following fields:

Field	Description
Customer	Select the name of the customer.
Contact	Select the contact name of the customer configured on the Contact Card page in Business Central. When a contact is selected, the Name , Email , and Phone field values are automatically populated based on the Business Central data. Alternatively, you can leave the Contact field empty and manually enter the name, email, and phone information.
Name	Specifies the name of the selected contact. You can edit this value if required.
Email	Specifies the email address of the selected contact.
Phone	Specifies the phone number of the selected contact.

- 3. Select **ADD NEW USER**.
A confirmation message appears as a notification.
After the user is added, the system sends an automated email to the specified address with a link and instructions to set up their login password.

Edit user configuration

To update user details, follow these steps:

- 1. On the **User management** page, double-click the required line created for the user role.
The **Edit user** window opens.
- 2. Edit or update the required field values.

ⓘ Note

You cannot edit the **Customer** and **Contact** field values.



3. Select the **Inactive** checkbox to block the user, preventing them from logging into the e-commerce platform.
You can clear the checkbox to unblock the user and restore login access.
4. Select **SAVE & CLOSE**.
The system saves the recent changes.
5. Select the **RESET PASSWORD** button to reset the user password. This action triggers an email to the user with a link to set up a new password.
6. Select the **DELETE USER** button to permanently remove the user from the system.

Note

The system displays timestamps for user details, such as created, last modified, last password change, and last login.

Add admin users

To add a new admin user, follow these steps.

1. On the **User management** page, select the **ADD ADMIN USER** button.

The **Add new user** window opens.

2. Enter the required information in the following fields:

Field	Description
Name	Enter the name of the admin user.
Email	Enter the email address where the admin user receives login instructions.
Phone	Enter the contact number of the admin user.

3. Select **ADD ADMIN USER**.

A notification confirms that the user is created successfully.

The new admin user receives an email with a link to set up their password and gain access to the portal.

Admin users can be edited or deleted in the same way as regular user accounts. For more information, see [Edit user configuration](#).



 Note

- In Business Central, the **E-Commerce User Email** field value displays the email address of the authenticated e-commerce user who created the document. This field value is automatically populated during document creation and retained through conversions from quotes to orders and from orders to posted invoices.

You can view this field on the following pages:

- Sales Orders
- Sales Order
- Posted Sales Invoices
- Posted Sales Invoice

Import e-commerce users from a CSV file

To import users using a CSV file, follow these steps:

1. On the **User management** page, select **IMPORT USERS**.

The **Import Users** window opens.

2. Select the **Choose File** button to upload a CSV file to generate e-commerce user records. The CSV file should include the following columns in order:

- Customer number
- Contact number
- Name
- Email address
- Phone number (format: +<country code> <phone number>)

3. In the **Number of Header Rows** field, use the (–) and (+) buttons to set how many header rows to skip from the CSV file while processing the user record.

If your CSV file includes headers (for example, column titles), enter the number of rows to skip in the **Number of Header Rows** field value before uploading.

4. Select **UPLOAD AND REVIEW**.

The system displays an error message if the file format or data is incorrect.

After a successful upload, the **Review Import** dialog opens, displaying the following information:

- Confirmation that the file was processed successfully.
- The total number of contacts to import.
- A preview of the contact records to be imported.



5. Select the **Send welcome emails immediately?** checkbox to send welcome emails to imported users when the import completes. The checkbox is cleared by default.

Note

If the checkbox is cleared, no welcome emails are sent during import. You can send welcome emails to the users at a later time from the **User management** page. To know more, see [Send welcome emails](#).

6. Select **Yes** to finish the import.

User accounts are created for all valid records. If the **Send welcome emails immediately?** checkbox is selected, the system sends a welcome email with a link to set up their password to each imported user.

7. Select **Cancel** to cancel the import process.

Note

- Rows with missing or invalid customer number or contact number are skipped.
- Duplicate users (based on existing email addresses) are not imported.
- Blank lines and header rows (based on the number specified) are ignored.

Send welcome emails

You can send welcome emails to one or more users from the **User management** page at any time. This is useful when users were imported without welcome emails, or when a welcome email needs to be resent.

To send welcome emails to users, follow these steps:

1. On the **User management** page, select the checkbox next to each user you want to send a welcome email to.
2. On the action bar, select **Send welcome emails**.

A confirmation dialog opens asking you to confirm sending welcome emails to the selected users.

3. Select **Confirm** to send the emails.

The system sends a welcome email with a link to set up their password to each selected user and displays a success message showing the number of emails sent.

4. Select **Cancel** to close the dialog without sending any emails.

For example, you imported 20 users without sending welcome emails. After the site goes live, select all 20 users on the **User management** page, then select **Send welcome emails** action. Confirm the action in the dialog. The system sends welcome emails to all 20 users and displays "Successfully sent 20 emails."



In-app text and translations

Article • 7/2/2025 • 4 min read

As an admin user, you can use the **IN-APP TEXT AND TRANSLATIONS** tab in the e-commerce administration portal to customize the display text and provide translations for supported languages. This functionality allows you to localize user-facing content without requiring development changes.

To update in-app text and translations, follow these steps:

- 1. On the **User management** page, select **IN-APP TEXT AND TRANSLATIONS**.

The **App Strings** page opens.

- 2. In the **Language** field, select the required language in which the system should display the text. The available options are: *English (United States)*, *Spanish (Spain)*, *Danish (Denmark)*, *German (Germany)*, *French (France)*, *Dutch (Netherlands)*, and *Swedish (Sweden)*.

The system displays information in the following fields:

Field	Description
Option ID	Specifies the unique identifier assigned to a specific user interface (UI) string in the application. It represents the internal reference used by the system to map text values displayed on the user interface. Example: <i>Headings_AccountName</i> refers to the heading label shown for account balance in the application. The Option ID field values remain constant across all languages, ensuring consistent reference across translations.
Text	Specifies the actual label or phrase that end users see in the interface.

 Note

Use the search bar to filter the required information from the app strings list by entering the details or keywords.

- 3. Double-click the row with the desired text ID that you want to update.
- 4. In the **Text** field, enter or modify the text to be displayed in the selected language. For example, the text corresponding to *Headings_AccountName* is shown as *Acct. Name*. You can modify or edit it as *ACCOUNT NAME*.



Translation variables

Certain text fields support the use of *variables*, which automatically adjusts the displayed content based on user-specific data. The table below lists the supported headings, or text fields, and explains what each variable represents.

Heading/Text	Variable	Represents	Example
Headings_CatalogSearchResults	{1}	The search term entered by the user in the e-commerce search bar.	Search results for "{1}"
Headings_MinimumOrder	{1}	The amount of products required to meet a specified order minimum.	Please add an additional {1} of products to your order.
Text_AreYouSureCancel	{1}	The order number being cancelled.	Are you sure that you want to cancel order {1}? This action cannot be undone.
Text_AreYouSureRemove	{1}	The number of items actively in the user cart.	Are you sure that you want to remove {1} item(s) from your cart?
Text_Cutoff_Warning	{1}	The order cut-off time.	Please place your order before {1}.
Text_ResetEmailBody	{1}	The link for resetting the user password.	Reset your password with this link: {1}. The link expires in 1 hour.
Text_WelcomeEmailBody	{1}	The link for setting the user password.	Set your password with this link: {1}
Text_Abandoned_Email_Body	{1}	The name of the e-commerce user.	Hello {1}, don't forget to complete your order at {2}. Thank you for shopping with us {3}.
Text_Abandoned_Email_Body	{2}	The URL of the e-commerce website to complete the orders.	Hello {1}, don't forget to complete your order at {2}. Thank you for shopping with us {3}.
Text_Abandoned_Email_Body	{3}	The name of your company.	Hello {1}, don't forget to complete your order at {2}. Thank you for shopping with us {3}.



Manage shopping carts

Article • 7/2/2025 • 4 min read

As an admin user, you can view and manage open shopping carts created by users through the e-commerce administration portal. You can also view cart details and delete shopping carts.

On the **Ecom Administration** page, select **CARTS**.

The **Shopping carts** page opens.

The system displays a list of users along with their cart details in the following fields:

Field	Description
Name	Specifies the name of the user who created the cart.
Customer Name	Specifies the name of the customer linked to the user.
Quote No.	Specifies the sales quote number from Business Central associated with the cart.
Receiving Date	Specifies the date the customer wants to receive the items.
Last Modified	Specifies the most recent update timestamp for the cart.

 **Note**

Use the search bar to filter the required information from the shopping carts list by entering the details or keywords.

View cart details

To view the shopping cart details, follow these steps:

1. On the **Shopping carts** page, double-click the desired cart entry from the list.
The **Cart Details** window opens.

The system displays a detailed list of items in the cart with the following fields:

Field	Description
-------	-------------



Product	Specifies the product code of the item (or item number) added to the cart.
Description	Specifies the name or description of the item.
Price	Specifies the unit price of the item.
Quantity	Specifies the number of units the user intends to purchase.

Note

Use the search bar to filter the required information from the user management list by entering the details or keywords.

2. Select the **CLOSE** button to close the **Cart Details** window without making any changes.
3. Select the **DELETE CART** button to delete the cart and its details.



E-Commerce users

Article • 9/24/2025 • 2 min read

Regular users, typically customers, interact with the e-commerce portal to place and manage orders. After logging in, users can browse the catalog, search for products, view and edit their shopping cart, select delivery dates, and submit orders. They can also access order history, account details, and receive notifications or confirmations based on the portal configuration.

Note

When an admin adds a customer email to the e-commerce portal, the system sends a welcome email to that address. The email contains a link with sign-in instructions. After clicking the link, the system directs you to the **New User Setup** page, where you can enter the email address. The system then sends a password reset email to set your login password.

User login

As a customer or user, you must log in to the e-commerce portal using your registered email address and password to access your dashboard and place orders.

To log in as a customer or user, follow these steps:

1. Open the preferred browser.
2. Go to the e-commerce **Login** page.
On the upper left corner of the **Login** page, verify that your company logo is displayed.
3. In the **Email address** field, enter your mail ID.
4. In the **Password** field, enter your password.
5. Select **SUBMIT** to proceed with your credentials.

After a successful login, the system directs you to the **Home** page of the e-commerce portal. The system displays an error message if the login fails.

If you've forgotten your password, follow these steps to reset it directly from the **Login** page.

6. On the **Login** page, select the **Forgot password?** link.
The **Forgot Password** page opens.
7. In the **Email address** field, enter your registered email address.
8. Select **SUBMIT**.

The system sends you email with instructions to reset your password if your email address is associated with an active e-commerce account.



E-Commerce portal

Article • 7/9/2025 • 5 min read

On the **Home** page, the header bar is your primary navigation tool in the e-commerce portal. The header bar appears on the upper side of every page in the e-commerce portal and provides quick access to key actions such as searching for products, viewing your account, checking your cart, and placing orders.

The following table describes elements in the header bar that are designed to help you complete common tasks quickly and easily.

Header Element	Purpose	Action
Company logo	Returns you to the Home page.	Select the logo at any time at the upper-left corner of the page.
Search bar	Helps you search for products across the site.	Enter the product name in the search bar and then select the Search icon.
Account icon	Provides access to your account details and sign-out options.	Hover over the Account icon to view a menu with: • Your company name. • Your username. • A link to your My Account Dashboard page. • Sign out option.



Cart icon	Displays your shopping cart details.	Select the Cart icon to open the My Cart page. Hover over the icon to view: • Requested delivery date. • Cut-off time reminder (if configured). To know more, see Integration with Aptean Call Plan. • Minimum order amount (if configured). To know more, see Integration with Aptean Order Minimums. • Total items and price. • The EMPTY CART button to clear items. • The VIEW CART button to open the My Cart page.
Order button	Opens the Order Entry – My Profile page.	Select the ORDER button to view or place an order.

View the footer bar

The footer bar is displayed at the lower side of each page of the e-commerce portal and provides quick access to important guidelines and contact information. Use the footer bar to view online order instructions or connect with the vendor's support team.

To view and use the footer bar, follow these steps:

1. Log in to the e-commerce portal.
2. Scroll to the bottom of the page to view the footer bar.
3. Select the **Online Order Guidelines** section to expand and view the online ordering instructions.
4. Below the guidelines, select the email address to open your default mail application to contact support or the service desk.
5. Select the phone number to initiate a support call using your device's dialer (on supported devices).
6. Review the copyright information displayed.
7. Select the **PRIVACY POLICY** link to view your company's privacy policy, which outlines how customer data is collected, used, and protected.



 Note

The guidelines, email address, phone number, and privacy policy are configured by the system administrator on the **Site Configuration** page settings. For more information, see [Site configuration](#).



View orders and announcements

Article • 7/2/2025 • 2 min read

The **Home** page in the e-commerce portal provides a snapshot of order activity and announcements. After logging in, you can view recent announcements, see order dates on a calendar, and review the status of your upcoming orders.

To access and interact with the **Home** page, follow these steps:

1. Open the e-commerce portal.
2. On the **Home** page, review the announcements at the upper side of the page. These are messages shared by your vendor or site administrator.
Below the announcements, the calendar is displayed.
3. On the calendar, select a date marked with a badge. These badges indicate dates for one or more scheduled deliveries.
Non-working days are disabled and cannot be selected. In addition, the calendar may display events configured in Business Central, helping you stay informed about important dates.
4. When you select a date, the order details panel on the right displays the orders scheduled for that date. Each order entry includes:
 - Order number
 - Total price
 - Order status



Place a new order

Article • 2/4/2026 • 3 min read

You can begin placing a new order from the e-commerce portal by selecting a ship-to location and preferred delivery date. This step helps define where and when the order should be delivered before browsing your available catalog items.

1. On the **Home** page, select the **ORDER** button.

The **Order Entry** window opens.

2. In the **Ship-to** field, select the delivery address from the list of ship-to addresses associated with the customer account in Business Central.

3. In the **Delivery Date** field, select the Calendar icon to specify the delivery date for the order.

The system displays only valid delivery dates, based on the configuration in the **Delivery Calendar** and **Delivery Horizon** fields on the **E-commerce Setup** page in Business Central. For more information, see [Set up e-commerce](#).

Note

- Invalid dates are disabled and cannot be selected or entered manually.
- Your e-commerce site administrator can disable the ability to select a delivery date. In that case, the **Delivery Date** field is hidden.

4. Select a date.

After you update the **Ship-to** and **Delivery Date** field values, the system automatically checks whether an existing order has the same ship-to address and delivery date. If a matching order is found, a confirmation message appears. You can select **CONTINUE** to proceed with creating a new order using the same details or **CANCEL** to exit without creating a new order.

5. Select **SUBMIT**.

The **Order Entry** window closes and your personalized item catalog is displayed.

Note

Before submitting, you can select the **RESET** button to reset the specified values on the **Ship-to** and **Delivery Date** fields.



Add items to your order

Article • 10/22/2025 • 4 min read

After selecting a delivery date and ship-to location in the **Order Entry** window, you can view and customize your order by browsing items available in your item catalog. The **Order Entry – My Profile** page allows you to filter, sort, and add items efficiently, helping you complete your order quickly.

You can search for items by typing product names or descriptions in the search bar. If your account is not restricted to profile-specific items, the system will also search the global item catalog and display all relevant matches.

In addition to browsing from your profile, you can select a marketing tile to access curated lists of special deals or promotional items. These lists are defined by item catalog codes.

The **Order Entry – My Profile** page is divided into three key sections:

- Header
- Filter
- Profile

Header section

Located at the upper side of the page, the header section displays your selected delivery date and allows you to edit it if needed.

- The system displays the current delivery date selected for your order.
- To change the delivery date or ship-to location, select the **EDIT** button. This action reopens the **Order Entry** window.

Updating the delivery date refreshes item availability based on your new selection.

Important

You can't edit the delivery date or ship-to location after adding items to the cart.

Filter by section

This section lets you refine the list of available products. The available filter options are,



- **Item Category:** This filter displays the item category code assigned on the **Item Card** page in Business Central, indicating the category to which the item belongs.
- **Item Attributes:** This filter displays the attributes linked to the items that are configured on the **Item Card** page in Business Central. The system only considers attributes that have the **Include in E-Commerce** checkbox selected on the **Item Attribute** page. Only the relevant attributes are displayed in the **Filter by** section of the **Order Entry – My Profile** page.
- **Catch Weight:** This filter displays only items sold by catch weight. For more information on catch weight items, see [Set up catch weight](#).

The system allows you to select one or more checkboxes to filter products. The item list updates automatically based on your selections.

Note

You can select the **CLEAR ALL** button to remove all selected filters and display the full catalog again.

Profile items section

This section displays the list of products available for ordering.

In the keyword search bar, enter text to search for items by name or number within the catalog.

Each item is displayed in a card-style layout with the following details:

- Item image
- Item name and packaging
- Item number
- Badges indicating:
 - Item category code
 - Item attributes
 - Item reference number (if a customer-specific item reference number is defined, the system displays it based on the specified start and end dates on the **Item References** page)
 - Catch weight
- Unit price of the item
- Quantity controls:
 - – button to reduce the quantity
 - + button to increase the quantity
 - Quantity box to manually enter the desired quantity



The cart is updated in real-time when you adjust quantities.

To add items to your order, follow these steps:

1. Open the **Order Entry – My Profile** page.

You can view the list of items available to order.

2. Select the + button to increase quantity by one.

Alternatively, enter the desired quantity in the quantity box directly.

3. Select the – button to reduce the quantity.

The selected items are added to the shopping cart.



Access your shopping cart

Article • 7/9/2025 • 4 min read

The **My Cart** page lets you review, modify, and submit the items you've selected for your order. You can also view your delivery details, check your subtotal, and monitor order minimum progress before submitting.

To access your shopping cart, follow these steps:

1. Select the Cart icon.

The **My Cart** page opens, displaying the cart summary details.

- Requested delivery date
- Order minimum progress bar
- Cart items

Each item in your cart is listed with:

- Item image
- Item description
- Unit price
- Quantity
- Subtotal price

2. Select the + button to increase the quantity of items in the cart.

3. Select the – button to decrease the quantity of items in the cart.

4. Select the Trash can icon to clear the corresponding item from your cart.

5. Select the **SUBMIT** button to submit the order to Business Central.

When the order is submitted, the system redirects to the **Checkout** page.

To continue shopping, select the **RETURN TO PROFILE** button to go back to the **Order Entry – My Profile** page.

To remove all items from your cart, select **EMPTY CART**.

Minimum order requirements during checkout

To ensure efficient order processing, your company requires a minimum order amount when using the e-commerce portal. With this functionality, the system checks your cart value before submission. If your cart total falls below the required amount, you will not be able to submit your order until the threshold is met.



This functionality is applicable only when the **Enable order minimum enforcement in E-Commerce** toggle on the **E-commerce Setup** page is turned on, and the Aptean [Order Minimums](#) extension is installed.

1. Open the desired **Customer Card** page.
2. On the action bar, select **Related > Customer > Order Minimums**.

The **Order Minimums** page opens.

3. Fill in the required field values.

For more information, see [Create order minimums](#).

4. On the e-commerce portal, select the Cart icon.

You can view the minimum order cart value required to proceed.

5. Select **VIEW CART**.

The **My Cart** page opens.

If your order doesn't meet the minimum requirement, and a valid minimum record is active within the defined date range with enforcement enabled for amount, the system notifies you of the required cart value to proceed.

6. Add or update the order based on the requirements.

7. Select **SUBMIT**.

Your order is placed.

If the **Enable order minimum enforcement in E-Commerce** toggle on the **E-commerce Setup** page is turned on, the system checks the **Mandatory** checkbox on the **Order Minimums** page.

- When the **Mandatory** checkbox is cleared, the system displays a notification regarding the minimum order requirements, and you can still place an order that does not meet the minimum order requirement.
- When the **Mandatory** checkbox is selected and the order value does not meet the defined minimum order requirement, the **SUBMIT** button is unavailable.

If the **Enable order minimum enforcement in E-Commerce** toggle is turned off, the system does not block order submission based on minimum value. For more information, see [Set up e-commerce](#).



Review and finalize your order

Article • 7/22/2026 • 3 min read

The **Checkout** page allows you to review your order details, add a custom purchase order (PO) or external document number, and submit your order. This is the final step before the order is processed and sent to Business Central.

The system automatically directs you to the **Checkout** page when the quote has been created from the **My Cart** page. You can view the following details:

Field	Description
Quote	Displays the sales quote number generated for the order in Business Central.
Receiving Date	Displays the selected delivery date for your order.

In the **Additional Information** section, enter the required information in the following fields:

Field	Description
PO number (Optional)	Enter your purchase order or external document number.
Email address	Specifies the email address linked to your account. This field is automatically populated with the associated email address, but the value can be changed if needed. The email address entered here is used to send the order confirmation email after the order is submitted.
Comments (Optional)	Enter any special instructions or notes for this order. A maximum of 500 characters is accepted. The comment is saved in Business Central against the sales order and is visible in order and invoice history views in the e-commerce portal.

 **Note**

The **Comments** field is always visible on the checkout page and does not require any configuration to enable. Customers who do not wish to add a comment may leave it blank.

Based on the order summary, the system shows a breakdown of:

- Subtotal price
- Tax
- Total price



Select the **SUBMIT** button to finalize and submit the order to Business Central.

After the order is placed, a confirmation email is sent to the email address provided on the **Checkout** page.

To continue shopping, select the **RETURN TO PROFILE** button to go back to the **Order Entry – My Profile** page.

To remove all items from your cart, select **EMPTY CART**.



View submitted orders

Article • 9/24/2025 • 2 min read

After you submit your order, a sales order number is generated, and you can view the order details on the **Sales Order** page in Business Central. To help identify orders created through the e-commerce platform, the **Created by E-Commerce** toggle on the following pages indicates that the order was created via the e-commerce platform.

- Sales Order
- Sales Invoice
- Posted Sales Invoice

The **Order Recap** page provides a complete summary of your submitted order. This includes order details, shipping and billing information, and a breakdown of all items ordered.

The system automatically directs you to the **Order Recap** page after your order has been submitted from the **Checkout** page.

You can view the following information:

- Sales order number
- Customer name and address
- Shipping name and address
- Order status
- Promised delivery date
- Requested delivery date
- Shipment date
- Total number of line items

Note

A line item refers to an individual item row, not the total quantity of units ordered.

A detailed breakdown of each ordered item in your order is displayed as follows:

- Item number
- Item description
- Quantity ordered
- Quantity shipped



- Unit price
- Unit discount (if any)
- Line total
- Subtotal (before taxes and discounts)
- Tax amount
- Final total

This page serves as a final, read-only confirmation of your submitted order.



Cancel orders

Article • 1/28/2026 • 2 min read

You can cancel sales orders that are in *Open* or *In Progress* status directly from the e-commerce portal. This helps you to manage your orders and prevent unnecessary shipments.

1. Open the **Home** page of the e-commerce portal.
2. In the calendar, select the required date to view the expected orders.
3. In the order details displayed for the selected date, select the order you want to cancel. This opens the **Order Recap** page.
4. On the **Order Recap** page, select the **Cancel Order** button.
5. Confirm the order cancellation by selecting the **Cancel Order** button again.
Subsequently, the system also deletes the corresponding sales order in Business Central.

Cancel an order from the account dashboard

To cancel orders from the account dashboard, follow these steps:

1. Select the Account icon.
2. Select the **My Account Dashboard** link.
The **My Account Dashboard** page opens.
3. Select the **RECENT ORDERS** section to view your latest orders.
The system displays the list of recent orders.
4. Select an order with the *Open* or *In Progress* status to open the **Order** summary page.
5. Select the **CANCEL ORDER** button.
The system checks the order status in Business Central and responds accordingly.

Order cancellation behavior and restrictions

The cancellation behavior depends on the order status in Business Central and the cancellation settings configured by your administrator.

When the order status is set to *Open*:

- The order is immediately deleted in Business Central.
- A confirmation message appears.
- The e-commerce portal refreshes to reflect the update.



When the order status is set to *Released*, the system checks and deletes the corresponding order based on the **Allow Cancelling Released Orders** field value specified on the **Customer Card** page.

For more information about the **Allow Cancelling Released Orders** field, see [Set up e-commerce](#).

 Note

Orders associated with warehouse shipments or already shipped cannot be cancelled. In such cases, the system displays an error message stating that the cancellation cannot be completed.



Modify orders

Article • 1/28/2026 • 2 min read

You can modify previously submitted orders that are in *Open* status directly from the e-commerce portal. To modify an order, follow these steps:

1. Open the **Home** page of the e-commerce portal.
2. In the calendar, select the required date to view the expected orders.
3. In the order details displayed for the selected date, select the order you want to modify. This opens the **Order Recap** page.
4. On the **Order Recap** page, select the **Edit Order** button.
5. Confirm the order modification by selecting the **Edit Order** button again.

To begin editing an order, your existing cart will be cleared of all items. This action cannot be undone. Once the order modification begins, you are redirected to the **My Profile** page, and all items on the order being modified are added to the cart. Additionally, the order summary at the top of the **My Profile** page indicates the ship-to address, receiving date, and order number of the order being modified.

When modifications are complete, perform the checkout process as with any other order to save the changes.

Modify an order from the account dashboard

To modify orders from the account dashboard, follow these steps:

1. Select the account icon.
2. Select the **My Account Dashboard** link.
The **My Account Dashboard** page opens.
3. Select the **Recent Orders** section to view your latest orders.
4. Select an order with the *Open* status to open the **Order Recap** page.
5. Select the **Edit Order** button.
6. To confirm the edit, select the **Edit Order** button again.



View account details

Article • 4/22/2026 • 3 min read

The **My Account Dashboard** page provides a comprehensive view of your e-commerce activity. You can check your account balance, review recent orders and invoices, manage language preferences, and access account-related actions like resetting your password.

To open your account dashboard, follow these steps:

- 1. In the header, select the Account icon.
- 2. Select the **My Account Dashboard** link.

The **My Account Dashboard** page opens.

The system displays key account details of the customer in the following fields:

Field	Description
Account Name	Specifies the customer name.
Acct. Balance	Specifies the current outstanding balance associated with your account. When the Aptean Pay extension is configured and your balance is greater than \$0.00, a PAY button appears next to the balance. Select it to open the Aptean Pay payer portal in a new tab and pay your full outstanding balance. To know more, see Pay invoices .
Terms	Specifies the terms defined for your payment. This value is inherited from the Payment Terms Code field value defined on the Customer Card page in Business Central.
Language	Select the required option to switch the language of the e-commerce interface.

- 3. Select the following buttons based on your requirements.

Button	Description
VIEW INVOICED ORDERS	Open the Order History page to view posted invoices.
REPORTS	Open the Reports dialog to request document reports available to your account. This button is visible only when the Aptean Document Publication extension is configured and reports are available for your account. To know more, see Request reports .
RESET PASSWORD	Send an email with instructions to reset your password. If you do not receive the email within a few minutes, please check your spam or junk folder.



SIGN OUT

Log out of the e-commerce portal.

The page displays the following sections with detailed order and invoice information.

- In the **RECENT ORDERS** section, the system displays the list of recent orders along with the related details as follows:
- Sales order number
- PO number (External document number)
- Receiving date
- Order total
- Order status
- Shipping address

You can select an order entry to open a detailed summary of the order. A **Reorder** button appears in the order detail. Select it to start a reorder based on that order. To know more, see [Reorder orders](#).

- In the **OPEN INVOICES** section, the system displays invoice records that have been created but have not yet been fully posted.
- Invoice number
- Customer
- PO number (External document number)
- Invoice date
- Due date
- Invoice amount
- Invoice balance
- Pay (visible only when the [Aptean Pay](#) extension is configured — select **Pay** to pay the invoice directly from the list)

Your account dashboard allows you to track your account and order activity from one location.



View order history

Article • 4/22/2026 • 2 min read

The **Order History** page allows you to search and review previously invoiced orders with ease. You can apply delivery date filters or search by sales order number to quickly find past transactions, making it easy to track previous orders and view complete invoice details.

To access and review your invoiced orders, follow these steps:

1. Open the **My Account Dashboard** page.
2. Select the **VIEW INVOICED ORDERS** button.
The **Order History** page opens.
3. Enter the following filters to narrow your search.

Field	Description
Beginning date	Select the earliest delivery date to include in your search.
Ending date	Select the latest delivery date.
Sales order	Enter a specific order number, if known.

4. Select **SUBMIT**.
On the **Search Results** section, you can view the results appear in a table with the following details:

- Email invoice (action to email invoice document)
- Invoice number
- Sales order number
- Customer
- PO number
- Invoice date
- Due date
- Invoice amount
- Invoice balance
- Pay (visible only when Aptean Pay is configured — select **Pay** to pay the invoice directly from the list)

 Note

In the **Email Invoice** field, select the receipt icon for the desired invoice to generate the invoice document. The official invoice is sent as a PDF attachment to the email address registered with your account.



5. Select any order in the table to view its invoice detail.

The invoice detail opens and displays the following header information:

Field	Description
Customer	The name of the customer on the invoice.
Ship-to address	The address to which the order was shipped.
Invoice date	The date the invoice was issued.
Due date	The payment due date for the invoice.
Shipped date	The date the order was shipped.
PO number	The purchase order number associated with the invoice.
Total line items	The total number of line items on the invoice.
Invoice balance	The outstanding unpaid amount on the invoice.

The invoice detail also displays a line items table with the following columns:

Column	Description
Product	The item number of the invoiced product.
Description	The description and unit of measure of the product.
Quantity	The quantity invoiced.
Price	The unit price of the product.
Discount	The line discount amount.
Amount	The line amount excluding tax.

The total invoice amount is shown at the bottom of the line items table.

When the [Aptean Pay](#) extension is configured and the invoice has a remaining balance, a **Pay** button appears in the invoice detail. Select it to open the **Pay Invoice** dialog and pay the invoice. To know more, see [Pay invoices](#).

A **Reorder** button also appears in the invoice detail. Select it to start a reorder based on the invoiced items. To know more, see [Reorder orders](#).

You can select the **RETURN TO MY ACCOUNT DASHBOARD** button to open the **My Account Dashboard** page.

With the **Order History** page, you can efficiently manage and review your previous purchases at your convenience.



Request reports

Article • 4/22/2026 • 1 min read

The **Reports** dialog on the **My Account Dashboard** page lists the document reports available to your account. When the Aptean [Document Publication](#) extension is configured by your administrator, you can request a report to be generated and delivered to your registered email address as a PDF attachment.

To request a report, follow these steps:

- 1. Open the **My Account Dashboard** page.
- 2. Select the **REPORTS** button.

The **Reports** dialog opens and displays the list of available reports with the following details:

Column	Description
Report Name	The name of the report. Select the report name to request it.
Last Run	The date and time the report was last requested.
Last Completed	The date and time the report was last successfully completed.
Status	The current processing status of the report.

- 3. Select the name of the report you want to request.

The system submits the report request and updates the **Status** column. The status refreshes automatically every 15 seconds.

The **Status** column displays one of the following values:

Status	Description
Queued	The report request has been received and is waiting to be processed.
Submitted	The report has been submitted to the reporting service.
Running	The report is currently being generated.
Completed	The report has been generated and sent to your email address as a PDF attachment.
Failed	The report could not be generated. Contact your administrator if this issue persists.
Timed Out	The report generation exceeded the allowed processing time. Contact your administrator if this issue persists.



 Note

The report is sent as a PDF attachment to the email address registered with your account.

For example, you need an invoice summary for your account. On the **My Account Dashboard** page, select **REPORTS**. In the **Reports** dialog, locate the report you need and select its name to request it. The **Status** column updates to *Queued* and progresses through *Submitted* and *Running*. Once the status shows *Completed*, the report has been generated and sent to your registered email address as a PDF attachment.



Pay invoices

Article • 4/22/2026 • 4 min read

When the Aptean Pay integration is configured by your administrator, you can pay outstanding invoices directly from the e-commerce portal. You can pay your full account balance from the **My Account Dashboard** page, or pay individual invoices from the invoice list or the invoice detail view.

 Note

Only full invoice payments are supported. Partial payments and selecting multiple invoices for payment at the same time are not available.

Pay your account balance

To pay your full outstanding account balance, follow these steps:

1. Open the **My Account Dashboard** page.
2. Next to your **Acct. Balance** tab, select the **PAY** button.

The Aptean Pay payer portal opens in a new browser tab where you can log in and complete the payment.

 Note

The **PAY** button is visible only when the [Aptean Pay](#) extension is configured and your account balance is greater than \$0.00.

Pay an individual invoice

You can pay individual invoices from the invoice list on the **My Account Dashboard** page, the **Order History** page, or the invoice detail view.

Pay from the invoice list

1. Open the **My Account Dashboard** page or the **Order History** page.
In the invoice list, the **Pay** column displays the payment status for each invoice:

Status	Description
Pay	The invoice has a remaining balance and is ready for payment. Select Pay to initiate payment.



Pending

A payment was just made for this invoice.

 Note

The **PAY** button is visible only when Aptean Pay is configured and your account balance is greater than \$0.00.

2. In the **Pay** column, select **Pay** for the invoice you want to pay.

The system validates the invoice before opening the payment dialog:

- If the invoice has not been sent to Aptean Pay for payment processing, an error message is displayed and the dialog does not open.
- If a payment against this invoice is already pending, an error message is displayed and the dialog does not open.

If neither condition applies, the **Pay Invoice** dialog opens, showing the invoice number and outstanding balance.

3. In the **Pay Invoice** dialog, select your preferred payment method.

Pay from the invoice detail view

1. On the **Order History** page, select an invoice to open the invoice detail view.

2. Select the **Pay** button in the invoice detail.

The system validates the invoice before opening the payment dialog:

- If the invoice has not been sent to Aptean Pay for payment processing, an error message is displayed and the dialog does not open.
- If a payment against this invoice is already pending, an error message is displayed and the dialog does not open.

If neither condition applies, the **Pay Invoice** dialog opens, showing the invoice number and outstanding balance.

3. In the **Pay Invoice** dialog, select your preferred payment method.

 Note

The **Pay** button on the invoice detail is visible only when the Aptean Pay extension is configured and the invoice has a remaining balance greater than \$0.00.



Payment options

When the **Pay Invoice** dialog opens, you can choose between two payment methods:

Guest Checkout

Pay using a card without logging in to the Aptean Pay payer portal.

1. Select the **Guest Checkout** tab.
2. Enter your billing address in the following fields:

Field	Description
Email	Enter your email address.
Street Address	Enter your billing street address.
Address 2	Enter an additional address line, if required.
Country	Select your country.
Postal Code	Enter your postal code.
Country Code	Enter your phone country code.
Phone Number	Enter your phone number.

3. Select **Continue**.
4. In the **Name on Card** field, enter the name as it appears on your card.
5. Enter your card details in the card entry form.
6. Select **Pay Now**.

The invoice number and payment amount are pre-filled and cannot be modified. If the payment is successful, the dialog closes and the invoice status updates to reflect the payment.

Portal

Open the Aptean Pay payer portal to log in and complete the payment using a saved payment method or payment history.

1. Select the **Portal** tab.



2. Select **Open Portal**.

The Aptean Pay payer portal opens in a new browser tab. After completing the payment in the portal, return to the e-commerce portal to see the updated invoice status.

Select **Cancel** at any time to close the dialog without making a payment.

For example, you have an outstanding invoice for \$1,250.00 on the **Order History** page. In the **Pay** column, select **Pay** to open the **Pay Invoice** dialog. Select the **Guest Checkout** tab, enter your billing address, and select **Continue**. Enter your name and card details, then select **Pay Now**. The dialog closes and the invoice shows a **Pending** status while the payment is processed.



Reorder past orders

Article • 4/22/2026 • 3 min read

You can reorder items from previously completed orders directly from the e-commerce portal. Rather than manually adding each item to your cart, you can copy all eligible items from a past order, select a new delivery date, and proceed to checkout. A **Reorder** button appears in the invoice detail on the **Order History** page and in the order detail on the **My Account Dashboard** page.

Note

Items that are unavailable, for example, due to being blocked or not being on the product catalog are excluded from the reorder. A message is displayed for any items that cannot be added.

Reorder from the Order History page

1. Open the **My Account Dashboard** page.
2. Select the **VIEW INVOICED ORDERS** button.
The **Order History** page opens.
3. Apply filters, select **SUBMIT** button, and then select an invoiced order from the results.
The invoice detail opens.
4. Select the **Reorder** button.
If your shopping cart contains items, the **Confirm Reorder** dialog appears with the message "Reordering will clear the shopping cart. This action cannot be undone." The dialog also lists all items currently in your cart. Select the **Reorder** button to continue and clear the cart, or select the **Close** button to cancel.
The **Begin Order** drawer opens.
5. Select a delivery date and select **Continue**.

The items from the original order are added to your cart. Open your cart and select the **Checkout** button to review and submit the order.

Reorder from the My Account Dashboard page

1. Open the **My Account Dashboard** page.
2. In the **RECENT ORDERS** section, select an order to open the order detail.
3. Select the **Reorder** button.
If your shopping cart contains items, the **Confirm Reorder** dialog appears with the message "Reordering will clear the shopping cart. This action cannot be undone." The dialog also lists all items currently in your cart. Select the **Reorder** button to continue and clear the cart, or select the **Close** button to cancel.



The **Begin Order** drawer opens.

4. Select a delivery date and select **Continue**.

The items from the original order are added to your cart. Open your cart and select **Checkout** to review and submit the order.

 Note

All items are repriced at checkout using current pricing rules. Prices from the original order may not be preserved. To adjust quantities or remove specific items before submitting, make changes on the **Cart** page before selecting **Checkout**.

For example, you previously ordered three items on invoice INV-00456. You open the **Order History** page, search for the invoice, and open its detail. You select **Reorder**. Because your cart already contains items, the **Confirm Reorder** dialog appears showing your current cart contents. You select **Reorder** to clear the cart and proceed. In the **Begin Order** drawer, you select a delivery date and select **Continue**. The items are added to your cart. You open the cart and select **Checkout** to review and submit the order.



E-Commerce AI Assistant

Article • 7/22/2026 • 2 min read

The Aptean E-Commerce extension provides an AI Assistant that can help you make and manage orders, along with other features. If the **Enable AI Assistant (Preview)** checkbox is selected in the E-commerce administrator portal, a floating action button appears in the e-commerce portal. Select the message button to open the AI assistant.

The AI assistant can help you with the following tasks:

- View your current cart and redirect you to the **My Cart** page if necessary.
- Search for items in your profile and beyond.
- Add or remove items from your cart.
- Starting a new sales order.
- Redirect you to the **My Cart** page for checkout.
- Display order guidelines.
- View order history and current order status.

View order history and current orders

The AI assistant can answer questions about past and current orders for the authenticated customer account.

Past orders

The AI assistant can retrieve the following information about past orders:

- The last date a specific item was ordered, including the order quantity and invoice number. Items can be referenced by item number or by name. If multiple catalog items match a name, the AI assistant returns last-order history for all matching items.
- A list of previous orders within a specified date range. Date ranges of up to six months are supported. If a range exceeding six months is requested, the AI assistant prompts the customer to narrow the range.
- When no date range is specified, the AI assistant returns orders from the last 90 days.
- Details of a specific order or invoice by number, including the order header information and all line items with item name and quantity.



 Note

- If an item exists in the catalog but has never been ordered by the customer, the AI assistant returns a clear "no previous orders for this item" response.
- If a requested order or invoice does not belong to the authenticated customer account, the AI assistant returns a "not found" response without disclosing whether the number exists on another account.
- All order history results respect the configured maximum items to display limit. When results are truncated, a link to the full order or invoice list page is included.

Current orders

The AI assistant can retrieve information about orders that are currently open or in progress:

- A list of all current sales orders with status *Open*, *In Progress*, or *Partially Shipped*. Orders with status *Shipped* are not included in current order results.
- Current order results show the order status and requested delivery date per order.
- Whether a specific item appears on any current order, including the order number or numbers if the item is found.

 Note

All responses are scoped to the authenticated customer account. No other customer's data is returned.



Integrations

Article • 4/22/2026 • 1 min read

The Aptean E-Commerce extension has been integrated with the following extensions:

- [Aptean Call Plan](#)
- [Aptean Document Publication](#)
- [Aptean Order Minimums](#)
- [Aptean Pay](#)
- [Aptean Transport](#)



Aptean Call Plan

Article • 7/2/2025 • 2 min read

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

To configure order cut-off times, follow these steps:

1. Open the **Sales Call Plan Setup** page.
2. Turn on the **Cut-off restrictions apply to E-Commerce** toggle. This enables alerts for e-commerce users when cut-off restrictions apply.
3. On the **Default Call Days** FastTab, specify the day of the week when your business stops accepting orders for each shipment day. For example, setting *Sunday* in the **For Monday Shipment** field triggers order cut-off validation on Sunday for Monday shipments.
4. On the **Order Entry Cut-off Times** FastTab, in the **Timezone** field, select the time zone that applies to the cut-off times.
5. In the **Monday** to **Sunday** fields, enter the time after which orders can no longer be placed for the respective day.

For example, if the following settings are configured:

- For Monday Shipment = Sunday
- Timezone = Eastern Standard Time
- Sunday = 6:30:00 PM

Then, orders for Monday shipment must be entered before 6:30 PM on Sunday. Any orders entered after that time are not accepted for Monday delivery.



Aptean Document Publication

Article • 4/22/2026 • 1 min read

When the Aptean E-Commerce extension is used with the Aptean [Document Publication](#) extension, e-commerce customers can request document reports directly from the **My Account Dashboard** page in the e-commerce portal. The available reports are filtered based on the custom category code configured on the **E-commerce Setup** page. When a report is requested, the system generates the report and delivers it to the customer's registered email address as a PDF attachment.

To configure the Document Publication integration, enter the relevant category code in the **Document Publication Custom Category Code** field on the **E-commerce Setup** page. To know more, see [Set up e-commerce](#).

To request a report as an e-commerce customer, see [Request reports](#).



Aptean Order Minimums

Article • 7/2/2025 • 1 min read

When the Aptean E-Commerce extension is used with the Aptean [Order Minimums](#) extension, you can configure minimum order requirements for customers to prevent them from submitting orders below the specified thresholds on the e-commerce platform. For more information, see [Minimum order requirements during checkout](#).



Aptean Pay

Article • 4/22/2026 • 1 min read

When the Aptean E-Commerce extension is used with the [Aptean Pay](#) extension, customers can pay outstanding invoices directly from the e-commerce portal. Payment options include paying the full account balance from the **My Account Dashboard** page, paying individual invoices from the invoice list, or paying from the invoice detail view. Payments can be completed by logging in to the Aptean Pay payer portal or by paying as a guest using an embedded card payment form.

! Note

This feature is only available when the Aptean Pay extension is installed and enabled in Business Central. Contact your administrator to set up the integration.

To pay invoices as an e-commerce customer, see [Pay invoices](#).



Aptean Transport

Article • 7/2/2025 • 1 min read

When the Aptean E-Commerce extension is used in conjunction with the Aptean [Transport](#) extension, you can define transport route assignments for customers to control the delivery dates available on the e-commerce platform.

For example, if a customer is not assigned to receive deliveries on Wednesdays, e-commerce users associated with that customer account cannot select Wednesday as a delivery date.

For more information, see [Transport route assignment](#).

