

# User Manual

# Aptean Food and Beverage ERP

## Essentials

Product Documentation



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# Release notes

Article • 5/27/2026 • 1 min read

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

| Date           | Release version            | Description       |
|----------------|----------------------------|-------------------|
| July 2026      | <a href="#">2603.0.0.0</a> | Major release     |
| May 2026       | <a href="#">2602.1.0.0</a> | Minor release     |
| April 2026     | <a href="#">2602.0.0.0</a> | Major release     |
| January 2026   | <a href="#">2601.1.0.0</a> | Stability release |
| January 2026   | <a href="#">2601.0.0.0</a> | Feature release   |
| November 2025  | <a href="#">2506.3.0.0</a> | Stability release |
| October 2025   | <a href="#">2506.2.0.0</a> | Stability release |
| September 2025 | <a href="#">2506.1.0.0</a> | Stability release |
| August 2025    | <a href="#">2506.0.0.0</a> | Feature release   |
| August 2025    | <a href="#">2505.1.0.0</a> | Stability release |
| July 2025      | <a href="#">2505.0.0.0</a> | Feature release   |
| July 2025      | <a href="#">2504.0.0.0</a> | Feature release   |
| July 2025      | <a href="#">2503.1.0.0</a> | Stability release |
| July 2025      | <a href="#">2503.0.0.0</a> | Feature release   |
| July 2025      | <a href="#">2502.0.0.0</a> | Feature release   |
| April 2025     | <a href="#">2501.1.0.0</a> | Stability release |
| March 2025     | <a href="#">2501.0.0.0</a> | Feature release   |
| October 2024   | <a href="#">2405.0.0.0</a> | Feature release   |
| October 2024   | <a href="#">2404.0.0.0</a> | Feature release   |
| August 2024    | <a href="#">2403.4.0.0</a> | Stability release |
| August 2024    | <a href="#">2403.3.0.0</a> | Stability release |



|               |                            |                   |
|---------------|----------------------------|-------------------|
| July 2024     | <a href="#">2403.2.0.0</a> | Stability release |
| May 2024      | <a href="#">2403.1.0.0</a> | Stability release |
| February 2024 | <a href="#">2403.0.0.0</a> | Feature release   |
| February 2024 | <a href="#">2402.0.0.0</a> | Feature release   |
| January 2024  | <a href="#">2401.0.0.0</a> | Initial release   |



# 2603.0.0.0

Release Note • 7/22/2026 • 3 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension,

- You can change the **Item Category Code** field value on the **Item Card** page and have the system automatically refresh the item's default dimensions to match the selected item category. For every dimension code defined on the category, the system replaces the item's corresponding default dimension with the category's current configuration, so posting behavior always reflects the item category's latest setup. Default dimensions for dimension codes the selected category does not define are left unchanged.
- When an item category's default dimension requires a mandatory dimension code and restricts it with an **Allowed Values Filter**, that restriction is copied onto the item automatically whenever you assign or re-confirm the item category on the **Item Card**. If the filter on the category is later narrowed, widened, or removed, the item's filter is refreshed to match the next time you re-select the item category.
- Clearing the **Item Category Code** field value on the **Item Card** page does not change any of the item's existing default dimensions. Default dimensions belonging to dimension codes that a newly selected item category does not define are also left untouched, so previously assigned or manually maintained dimensions are never lost.
- Applying an **item template** to a new item, and changing the **Item Category Code** field value directly on the **Item Template Card**, both automatically apply the selected item category's default dimensions using the same logic as the **Item Card**. Automatic dimension refresh applies only to these direct, interactive changes; dimensions on items created or updated through APIs, web services, or configuration package imports are not affected.
- Every dimension change made by the automatic item category refresh is fully captured in Business Central's standard change log and continues to trigger any custom event subscribers your organization has configured for default dimensions, so the record always shows the correct user and a complete audit trail - including cases where the refreshed values match what was already there.
- The system supports in-browser preview of image attachments on document attachment pages. Image attachments in **JPG, PNG, BMP, or GIF** format open in a modal image viewer with **Zoom In, Zoom Out, and Fit to Window** controls, with zoom clamped between 25% and 500%. Non-image files supported by the Business Central file viewer, such as **PDF**, continue to open in the standard viewer, and files that are not previewable fall back to the existing export/download behaviour. The enhancement applies to every page that surfaces the standard document attachment factbox or details page, so users can preview image attachments without downloading them from any context in which attachments are displayed, including Non-conformance records.



## UI/UX changes

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

- A new **Dimensions** action has been added to the **Navigate** group on the **Item Category Card** page, so you can view the default dimensions configured on an item category without leaving the page.
- The **Document Attachment Details** page and the **Doc. Attachment List Factbox** now replace the standard **Name** field with a drilldown-enabled field that routes image attachments to the in-browser viewer and non-image files to the standard viewer or export path.
- The **Open in File Viewer** action on both pages has been replaced with a **View** action that handles both image and non-image files. The action is disabled when the selected attachment has no content or when multiple rows are selected.
- A new **Image Viewer** modal page hosts the image preview and exposes **Zoom In**, **Zoom Out**, and **Fit to Window** actions.



# 2602.1.0.0

Release Note • 5/27/2026 • 2 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension,

- You can view the **Item Configurable Code 01** through **Item Configurable Code 05** field values on all the sales and purchase document line subforms by enabling them through personalization. The system automatically populates these field values with the corresponding configurable code values from the **Item Card** page when an item is entered on a document line. The field captions are dynamic and reflect the configured names from the Configurable Codes FastTab on the **Inventory Setup** page. To know more, see [Configurable codes](#).
- The system populates the **Reason Code** field value on the **Item Ledger Entries** page from the source document.
- You can view the **Customer No.** and **Customer Name** field values directly on the **Production Order** page. The values are automatically populated from the source sales order when the **Source Type** field value is set to *Sales Order*.
- You can control the source of the **Salesperson Code** field value on sales documents using the **Salesperson Source** field on the **Sales & Receivables Setup** page. To know more, see [Salesperson Source](#).

## UI/UX changes

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

- The **Reason Code** field has been added to the **Item Ledger Entries** page.
- The **Customer No.** and **Customer Name** fields have been added to the **Production Order** page:
- The **Salesperson Source** field has been added to the **Sales & Receivables Setup** page.



# 2602.0.0.0

Release Note • 4/22/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension,

- You can define the **External Document No. Check Mode** field value to *On Release* or *On Posting* on the **Sales & Receivables Setup** page when the external document number mandatory validation is applied for sales documents. For more information, see [Set up external document number check mode](#).
- The system enforces mandatory validation of the **External Document No.** field for sales documents at the configured execution point. If the **External Document No.** field value is left blank, you cannot release or post the document. For more information, see [Validate external document number on sales release and posting](#).

## UI/UX changes

The **External Document No. Check Mode** field has been added to the **General** FastTab of the **Sales & Receivables Setup** page.



# 2601.1.0.0

Release Note • 1/28/2026 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 345299 | The system fails to populate the <b>Description</b> field value when selecting the <b>Configurable Code 01</b> field value on the <b>Configurable Codes</b> FastTab of the <b>Purchase &amp; Payables Setup, Sales &amp; Receivables Setup, and Inventory Setup</b> pages. |



# 2601.0.0.0

Release Note • 1/28/2026 • 1 min read

## Features

With the feature added in this release of the Aptean Essentials extension, you can:

- Create custom, language-specific text descriptions as comment lines in invoices and credit memos for consistent document formatting and improved customer communication.
- Automatically insert configured comment lines when processing invoice and credit memo transactions based on transaction type, language code, and field combinations.

To know more, see [Invoice text list](#).

## UI/UX changes

The **Invoice Text List** page has been added.



# 2506.3.0.0

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

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                          |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 330584 | The system fails to update the <b>Shipping Agent Code</b> and <b>Shipping Agent Service Code</b> field values on the <b>Sales Return Order</b> and <b>Sales Credit Memo</b> pages when the <b>Ship-to Code</b> field value is updated, and the values are not inherited from the associated <b>Sales Order</b> page. |



# 2506.2.0.0

Release Note • 10/22/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean EDI extension. For more information, see [What's new in EDI, version 2515.0.0.0](#).



# 2506.1.0.0

Release Note • 9/24/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension, you can determine whether the **Quantity per** field value on the **Production Order Components** page should be rounded. This functionality works based on the configuration of the **Do Not Round Qty. Per in Prod. Order Component Lines** toggle on the **Manufacturing Setup** page. For more information, see [Set up manufacturing components](#).

## UI/UX changes

The **Do Not Round Qty. Per in Prod. Order Component Lines** toggle has been added to the **Manufacturing Setup** page.

## Integrations

The Aptean Essentials extension has been integrated with the Aptean [Process Manufacturing](#) extension. For more information, see [Integrations](#).



# 2506.0.0.0

Release Note • 8/27/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Beverage Logistics extension, Drink-IT Edition. To know more, see [What's new in Beverage Logistics, version 2505.0.0.0](#).



# 2505.1.0.0

Release Note • 8/27/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension, the **Configurable Code** and **Configurable Code Value** pages have been renamed to **Configurable Codes** and **Configurable Code Values** respectively, ensuring consistency and improving the overall user experience. This enhancement addresses the issue reported in bug ID #316157.

## UI/UX changes

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

- The **Configurable Code** page has been renamed to **Configurable Codes** page.
- The **Configurable Code Value** page has been renamed to **Configurable Code Values** page.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                           |
|--------|-----------------------------------------------------------------------------------------------------------------------|
| 316157 | The system displays an incorrect caption for the <b>Configurable Codes</b> and <b>Configurable Code Values</b> pages. |



# 2505.0.0.0

Release Note • 7/30/2025 • 1 min read

## Features

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

- Create attribute classifications for consistent data organization and improved reporting.
- Configure the code for the item, vendor, and customer attributes. To know more, see [Set up configurable codes for customers](#), [Set up configurable codes for items](#), and [Set up configurable codes for vendors](#).
- Update the **Bin Code** field value on the **Lines** FastTab based on the **Bin Code** field value on the **General** FastTab of the **Warehouse Shipment** and **Warehouse Receipt** pages and automatically synchronize bin locations. To know more, see [Update bin code](#).

## UI/UX changes

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

- The following pages have been added.
  - Configurable Codes
  - Configurable Code Values
- The **Configurable Codes** FastTab has been added to the following pages:
  - Sales & Receivables Setup
  - Purchase & Payables Setup
  - Inventory Setup
  - Vendor Card
  - Customer Card
  - Item Card
  - Vendors list
  - Items list
  - Customers list



# 2504.0.0.0

Release Note • 7/30/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension, the system inherits the **Shipping Agent Code** and **Shipping Agent Service Code** field values on the **Posted Purchase Receipt** page from the associated **Purchase Order** page.



# 2503.1.0.0

Release Note • 7/30/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                   |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 308951 | The system fails to populate the <b>Gen. Bus. Posting Group</b> field value on the <b>Item Revaluation Journals</b> page when selecting the <b>OK</b> button on the <b>Implement Standard Cost Change</b> page. This issue occurs when the <b>Item Journal Template</b> field value is set to <i>REVAL</i> on the <b>Implement Standard Cost Change</b> page. |



# 2503.0.0.0

Release Note • 7/30/2025 • 2 min read

## Features

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

- Designate an employee as an item purchaser. This improves inventory management and defines clear responsibility across transactions. For more information, see [Set up item purchasers](#).
- View and add item purchasers for items on sales and purchase documents. This improves inventory management and defines clear responsibility across transactions. For more information, see [Manage item purchasers in sales and purchase documents](#).
- Filter the items on the **Inventory Overview** and **Alternative Cost Worksheet** pages based on item purchasers. For more information, see [Integration with Aptean Inventory Overview](#) and [Integration with Aptean Pricing Matrix](#).

### Note

This functionality is available only when the Aptean [Inventory Overview](#) and Aptean [Pricing Matrix](#) extensions are installed.

## Integrations

The Aptean Essentials extension has been integrated with the following extensions:

- Aptean [Inventory Overview](#)
- Aptean [Pricing Matrix](#)

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

## UI/UX changes

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

- The **Purchaser** field has been added to the **Items** list page and the **Replenishment** FastTab on the **Item Card** page.
- The **Item Purchaser** field has been added to the following pages:
  - Sales Order



- Sales Lines
- Blanket Sales Order
- Sales Quote
- Sales Invoice
- Sales Credit Memo
- Sales Return Order
- Purchase Order
- Purchase Lines
- Blanket Purchase Order
- Purchase Quote
- Purchase Invoice
- Purchase Credit Memo
- Purchase Return Order
- Posted Sales Invoice
- Posted Return Receipt
- Blanket Sales Order Archive
- Posted Sales Credit Memo
- Sales Order Archive
- Sales Quote Archive
- Posted Purchase Invoice
- Posted Purchase Receipt
- Blanket Purchase Order Archive
- Posted Purchase Credit Memo
- Purchase Order Archive
- Purchase Quote Archive
- The **Item Purchaser Filter** field has been added to the **General** FastTab of the **Inventory Overview** page.

 **Note**

This field is available only when the Aptean [Inventory Overview](#) extension is installed.

- The **Item Purchaser** field has been added to the **Filters** FastTab of the **Alternate Cost Worksheet** page.



 Note

This field is available only when the Aptean [Pricing Matrix](#) extension is installed.



# 2502.0.0.0

Release Note • 7/2/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Beverage Foundation Management extension, Drink-IT Edition. To know more, see [What's new in Beverage Foundation Management, version 2503.1.0.0](#).



# 2501.1.0.0

Release Note • 4/29/2025 • 1 min read

## Enhancements/Modifications

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

- Chinese (zh\_CN)
- Swedish (sv-SE)



# 2501.0.0.0

Release Note • 3/26/2025 • 1 min read

## Features

With the feature added in this release of the Aptean Essentials extension, you can view and edit the **Ship-to Code** field value on the **Sales Credit Memo** page. This field automatically inherits the **Ship-to Code** field value on the **Customer Card** page.

## UI/UX changes

The **Ship-to Code** field has been made visible on the **Sales Credit Memo** page.



# 2405.0.0.0

Release Note • 10/25/2024 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Trade Management extension. To know more, see [What's new in Trade Management, version 2412.0.0.0](#).



# 2404.0.0.0

Release Note • 10/9/2024 • 1 min read

## Features

This extension has been updated to ensure interoperability with the Aptean Mobile Warehouse Registration extension. To know more, see [What's new in Mobile Warehouse Registration, version 2408.1.0.0](#).



# 2403.4.0.0

Release Note • 8/20/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension, the process has been enhanced to manage the *User Group* and *User Group Permission Set* tables. This ensures compatibility with both current and future versions of Business Central, even when these tables are deprecated.

### Note

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



# 2403.3.0.0

Release Note • 8/8/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Essentials extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.



# 2403.2.0.0

Release Note • 7/18/2024 • 1 min read

## Enhancements/Modifications

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

- Swedish (sv-SE)
- German (de-CH)
- French (fr-CH)
- French (fr-BE)
- Dutch (nl-BE)



# 2403.1.0.0

Release Note • 5/10/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                               |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 199839 | When creating a new sales or purchase order, an error occurs on the respective <b>Sales Order</b> or <b>Purchase Order</b> page, when the <b>Permission Set</b> field is set as <i>ESSENTIALBASIC137FDW</i> on the <b>User Card</b> page. |



# 2403.0.0.0

Release Note • 2/19/2024 • 1 min read

## Features

With this feature release of the Aptean Essentials extension, you can configure the posting date and default posting option for both inbound and outbound documents.

## UI/UX changes

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

- The **Shipping Agent Code** and **Ship Agent Service Code** fields are added to the following documents:
  - Purchase Invoice
  - Purchase Credit Memo
  - Posted Warehouse Receipts
  - Posted Purchase Invoice
  - Posted Purchase Receipt
  - Vendor Card
  - Warehouse Receipt

### Note

- The fields added in the purchase section share the same functionality as those in sales documents. You can define these fields in the vendor card, and they will automatically populate in associated purchase documents. You can modify these values as needed. Additionally, the field values also flow to the associated posted documents.
  - When you modify the value in the warehouse receipt document, the updated value flows to the associated purchase order once the receipt is posted.
- The **Shipping Method Code** field is added to the **Warehouse Receipts** and **Posted Warehouse Receipts**.



# 2402.0.0.0

Release Note • 2/8/2024 • 1 min read

## Features

With the features added in this release of the Aptean Essentials extension, you can calculate the standard weight of the item ledger entries by turning on the **Weight Analysis** toggle on the **Inventory Setup** page.

## UI/UX changes

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

- The **Weight Analysis** toggle is added to the **General** FastTab of the **Inventory Setup** page.
- The **Total Net Weight** field is added to the **Item Ledger Entries** page.



# 2401.0.0.0

Release Note • 1/24/2024 • 1 min read

## Features

With this feature release of the Aptean Essentials extension, you can setup the **Default Business Posting Group** for the item journal lines by selecting the **Reason Code** on the **Item Journals** page. For more information, see [Setup General Business Posting Group via Reason Code](#).



# Introduction

Article • 2/12/2025 • 1 min read

The Apteau Essentials (EST) extension includes various features and improvements to streamline business operations in the food and beverage industry, enhancing overall control and efficiency in day-to-day operations.



# General setup

Article • 4/22/2026 • 1 min read

The following setup are required.

- [Manage permission sets](#)
- [Set up general business posting\\_group via reason code](#)
- [Set up posting date](#)
- [Set up posting default](#)
- [Set up external document number check mode](#)



# Manage permission sets

Article • 12/20/2024 • 3 min read

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

We provide the following system permission sets:

- Direct
- Indirect

## Direct permission sets

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

The direct permission set ID for this extension is *ESSENTIAL137FDW*.

## Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *ESSENTIALBASIC137FDW*.

## 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 Essentials extension, ensuring secure and role-based access.



# Set up general business posting group via reason code

Article • 1/24/2024 • 2 min read

To setup **General Business Posting Group** via **Reason Code**,

1. Select the Search icon , enter **Item Journals**, and then choose the related link.  
The **Item Journals** page opens.
2. In the item journal lines, select the dropdown in the **Reason Code** field and click **Select from Full List**.  
The **Reason Codes** page will open, displaying columns for **Reason Code**, **Description**, and **Default Business Posting Group**. When you select the required reason code on the **Reason Codes** page, the system will automatically populate the **Gen. Bus. Posting Group** field in the item journal lines with the predefined value from the **Reason Codes** List.

## Note

The reason code will update the **Gen. Bus. Posting Group** field only when the *Positive Adjmt.* or *Negative Adjmt.* is selected in the **Entry Type** field.

Alternatively, you can perform this by selecting the context menu in the **Batch Name** field. If the reason code with the default **Gen. Bus. Posting Group** is available for the chosen batch name, the system will automatically fill in the **Reason Code** and **Gen. Bus. Posting Group** fields in the item journal lines.



# Set up posting date

Article • 2/19/2024 • 3 min read

The posting date is vital for timing financial transactions, influencing inventory valuation, and ensuring accurate reporting in both purchase and sales documents.

You can configure the defined parameters based on which the posting date will be generated for specified inbound and outbound documents. The following procedures describe how to perform this activity.

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

- 2. On the **General** FastTab, configure the following toggles:

| Field    | Description                                                                               |
|----------|-------------------------------------------------------------------------------------------|
| Purchase | Enable this to adjust the configured posting date setup for purchasing-related documents. |
| Sales    | Enable this to adjust the configured posting date setup for sales-related documents.      |

 Note

Upon turning off the **Purchase** and **Sales** toggles, the relevant fields will be greyed out and the system doesn't consider configurations from the **Posting Date Setup** page.

- 3. On the **Sales** FastTab, select the value from the dropdown list for the following fields:

| Field                                | Description                                                                                                           |
|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Sales Order (Document Date)          | Specifies the parameter used to calculate the document date field value for sales orders.                             |
| Sales Shipment (Posting Date)        | Specifies the parameter based on which the posting date field value will be calculated for the posted sales shipment. |
| Sales Return Order (Document Date)   | Specifies the parameter based on which the document date field value will be calculated for the sales return orders.  |
| Sales Return Shipment (Posting Date) | Specifies the parameter based on which the posting date field value will be calculated for the sales return shipment. |
| Sales Credit Memo (Document Date)    | Specifies the parameter based on which the document date field value will be calculated for the sales credit memos.   |



|                                             |                                                                                                                        |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| <b>Sales Credit Memo (Posting Date)</b>     | Specifies the parameter based on which the posting date field value will be calculated for the sales credit memos.     |
| <b>Posted Sales Invoice (Document Date)</b> | Specifies the parameter based on which the document date field value will be calculated for the posted sales invoices. |
| <b>Posted Sales Invoice (Posting Date)</b>  | Specifies the parameter based on which the posting date field value will be calculated for the posted sales invoices.  |

### Note

The fields on the **Sales** FastTab have the following options to choose from:

*Manual:* The system assigns the posting date based on the default date set up with the business central.

*Work Date:* The system assigns the posting date based on the work date configured on the My Settings page for the relevant company.

*Request Delivery Date:* The system assigns the posting date based on the Requested Delivery Date defined on the Invoice Details FastTab on the relevant pages.

*Promised Delivery Date:* The system assigns the posting date based on the Promised Delivery Date defined on the Invoice Details FastTab on the relevant pages.

4. On the **Purchase** FastTab, select the value from the dropdown list for the following fields:

| Field                                          | Description                                                                                                              |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>Purchase Order (Document Date)</b>          | Specifies the parameter based on which the document date field value will be calculated for the purchase orders.         |
| <b>Purchase Receipt (Posting Date)</b>         | Specifies the parameter based on which the posting date field value will be calculated for the purchase receipt.         |
| <b>Purchase Return Order (Document Date)</b>   | Specifies the parameter based on which the document date field value will be calculated for the purchase return orders.  |
| <b>Purchase Return Shipment (Posting Date)</b> | Specifies the parameter based on which the posting date field value will be calculated for the purchase return shipment. |
| <b>Purchase Credit Memo (Document Date)</b>    | Specifies the parameter based on which the document date field value will be calculated for the purchase credit memos.   |
| <b>Purchase Credit Memo (Posting Date)</b>     | Specifies the parameter based on which the posting date field value will be calculated for the purchase credit memos.    |
| <b>Purchase Invoice (Document Date)</b>        | Specifies the parameter based on which the document date field value will be calculated for the purchase invoices.       |



|                                               |                                                                                                                          |
|-----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| <b>Posted Purchase Invoice (Posting Date)</b> | Specifies the parameter based on which the posting date field value will be calculated for the posted purchase invoices. |
|-----------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|

 **Note**

The fields on the **Purchase** FastTab have the following options to choose from:

*Manual:* The system assigns the posting date based on the default date set up with the business central.

*Work Date:* The system assigns the posting date based on the work date configured on the My Settings page for the relevant company.

*Request Receipt Date:* The system assigns the posting date based on the Requested Receipt Date defined on the Invoice Details FastTab on the relevant pages.

*Promised Receipt Date:* The system assigns the posting date based on the Promised Receipt Date defined on the Invoice Details FastTab on the relevant pages.

 **Note**

The **Posting Date Setup** enables you to define values without internal validation. For example, you can set a **Posting Date** before the **Document Date** if needed.

The posting date setup is completed.



# Set up posting default

Article • 2/19/2024 • 3 min read

The posting default setup automates document posting by enabling users to configure default options like shipping, invoicing, or both. This improves efficiency, reduces errors, and ensures consistency in financial transactions tailored to the specific needs and industry requirements of businesses.

With this feature, you can configure default values that will be considered upon posting the documents. When you select the post action, the posting dialog box appears with the option preselected, as configured on the Posting Default Setup page. You can select another option if needed. The following procedures describe how to perform this activity.

1. Select the Search icon , enter **Posting Default Setup**, and then choose the related link.  
The **Posting Default Setup** page opens.
2. On the **General** FastTab, enable the following toggles:

| Field    | Description                                                                                  |
|----------|----------------------------------------------------------------------------------------------|
| Sales    | Enable this to modify the configured posting default setup for sales-related documents.      |
| Purchase | Enable this to modify the configured posting default setup for purchasing-related documents. |

 **Note**

Upon turning off the **Sales** and **Purchase** toggles, the relevant fields will be greyed out and the system doesn't consider configurations from the **Posting Default Setup** page.

3. On the **Sales** FastTab, select the desired values from the dropdown list for each field.

 **Note**

The fields on the **Sales** FastTab have the following options to choose from:

*Ship & Invoice:* The system will create a posted sales invoice and warehouse shipment document.

*Ship:* The system will only generate an associated warehouse shipment document.

*Invoice:* The system will only generate an associated posted sales invoice document.

4. On the **Purchase** FastTab, select the desired values from the dropdown list for each field.



 Note

The fields on the **Purchase** FastTab have the following options to choose from:

*Receive & Invoice:* The system generates associated purchase invoices and warehouse receipt documents.

*Receive:* The system generates the associated warehouse receipt document.

*Invoice:* The system generates associated purchase invoices.

The Posting Default setup is completed.

 Note

The posting default setup mirrors Business Central's **User Setup** functionality. When configured, the **Sales Invoice Posting Policy** and **Purch. Invoice Posting Policy** field values take precedence over the **Posting Default Setup**. For further details on **User Setup**, see [Define an invoice posting policy for various users](#).



# Set up external document number check mode

Article • 4/22/2026 • 2 min read

The **External Document No. Check Mode** field controls when mandatory validation for external document number is applied on sales documents.

To configure this functionality, follow these steps:

1. Select the Search icon , enter **Sales & Receivables Setup**, and then choose the related link.  
The **Sales & Receivables Setup** page opens.
2. On the **General** FastTab, turn on the **Ext. Doc. No. Mandatory** toggle to define the external document number associated with the sales document.
3. In the **External Document No. Check Mode** field, select the desired value. The available options are:
  - *On Posting*: validates external document number during posting.
  - *On Release*: validates external document number during release.

## Note

This field is editable only when the **Ext. Doc. No. Mandatory** toggle is turned on.



# Manage item purchasers

Article • 7/30/2025 • 1 min read

You can designate an employee as an item purchaser. The item purchaser is responsible for managing the inventory and purchasing. This improves inventory management and defines clear responsibility across transactions.

## Set up item purchasers

To set up an item purchaser, follow these steps:

1. Navigate to the **Salespeople/Purchasers** page and define a purchaser.  
For more information, see [Set up purchasers](#).
2. Navigate to the relevant **Item Card** page.
3. On the **Replenishment** FastTab, in the **Purchase** section, in the **Purchaser** field, select the item purchaser from the list of purchasers available on the **Salespeople/Purchasers** page.  
The item purchaser is set up.

### Note

- The **Purchaser** field is not visible by default and must be added via personalization.
- The **Purchaser** field is available on the **Items** list page, and you can filter items based on item purchasers.

## Manage item purchasers in sales and purchase documents

The system automatically updates the **Item Purchaser** field value with the relevant item purchaser defined on the associated **Item Card** page when an item is added on the **Lines** FastTab of any of the following pages:

- Sales Order
- Blanket Sales Order
- Sales Quote
- Sales Invoice
- Sales Credit Memo
- Sales Return Order
- Purchase Order
- Blanket Purchase Order
- Purchase Quote
- Purchase Invoice



- Purchase Credit Memo
- Purchase Return Order

Further, you can manually update the **Item Purchaser** field value as required.

### Note

- The **Item Purchaser** field is not visible by default and must be added via personalization.
- The system inherits the **Item Purchaser** field value on:
- The **Sales Lines** and **Purchase Lines** pages.
- All the related posted and archived documents.
- You can filter items based on item purchasers on all pages.



# Calculate the total net weight quantity of the item ledger entries

Article • 2/8/2024 • 2 min read

To calculate the total net weight of the item ledger entry,

1. Select the Search icon , enter **Inventory Setup**, and then choose the related link.  
The **Inventory Setup** page opens.
2. On the **General** FastTab, turn on the **Weight Analysis** toggle.  
The **Total Net Weight** is automatically calculated based on the item's net weight and populated in the **Total Net Weight** field of the **Item Ledger Entries** page.

 **Note**

The **Total Net Weight** is the product of the net weight specified in the Item Card and the base quantity.  
**Total Net Weight = Net Weight (Item Card) \* Base Quantity**



# Configurable Codes

Article • 7/30/2025 • 3 min read

You can configure unique codes, captions, and then view those codes in related reports for items, vendors, and customers.

To configure set up the configurable code, follow these steps:

- 1. Select the Search icon , enter **Configurable Codes**, and then choose the related link. The **Configurable Codes** page opens.
- 2. On the action bar, select **New** to create a configurable code.
- 3. Enter the required information in the following fields:

| Field       | Description                                                                                                                                                                                            |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Code        | Specifies a unique identifier for a configurable attribute, such as color or size. If the <b>Code</b> field value is the same, the system displays an error if the Code field value is already in use. |
| Description | Enter a brief description of the configurable code.                                                                                                                                                    |
| Caption     | Enter the caption for this code.                                                                                                                                                                       |

 **Note**

When you attempt to delete the code that is used on the linked **Sales & Receivables Setup**, **Purchases & Payables Setup**, or **Inventory Setup** pages, the system displays an error message indicating the code is in use.

## Manage configurable code values

- 1. On the **Configurable Codes** page, on the action bar, select **Actions > Configurable Code Values**. The **Configurable Code Values** page opens.
- 2. On the action bar, select **New** to create a configurable code value.
- 3. Enter the required information in the following fields:

| Field             | Description                                                     |
|-------------------|-----------------------------------------------------------------|
| Configurable Code | Specifies the configurable code to which the value is assigned. |



|             |                                                                                                                                                                                                                                                                                                   |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Code        | Specifies a unique identifier for a configurable attribute, such as color or size. This code defines how captions appear on related pages like items, vendors, and customers. If the <b>Code</b> field value is the same, the system displays an error if the Code field value is already in use. |
| Description | Enter a brief description of the configurable code.                                                                                                                                                                                                                                               |
| Caption     | Enter the caption for this code.                                                                                                                                                                                                                                                                  |

## View configurable codes on document lines

After configuring configurable codes and assigning values to items, you can view these values directly in the sales and purchase document lines.

To enable configurable code fields on document lines, follow these steps:

1. Open a sales or purchase document page.
2. On the **Lines** FastTab, select **Personalize > Add Field**.
3. Search for the **Item Configurable Code** fields (01–05) and add them to the lines.

The fields are automatically populated with the configurable code values from the **Item Card** page when the **Item No.** field value is validated on a document line. These fields are non-editable and their captions dynamically reflect the **Caption** field value configured on the **Configurable Codes** page.

 **Note**

The **Item Configurable Code 01** through **Item Configurable Code 05** fields are available on the following pages: **Sales Order**, **Sales Quote**, **Sales Invoice**, **Sales Credit Memo**, **Sales Return Order**, **Blanket Sales Order**, **Purchase Order**, **Purchase Quote**, **Purchase Invoice**, **Purchase Credit Memo**, **Purchase Return Order**, and **Blanket Purchase Order**. These fields are hidden by default and must be enabled through personalization.



# Update bin code

Article • 7/30/2025 • 1 min read

On the **Warehouse Shipment** and **Warehouse Receipt** pages, when you update the **Bin Code** field value on the **General** FastTab, the system prompts you with a confirmation message.

- If you select **Yes**, the updated **Bin Code** field value is applied to the **Bin Code** field value on the **Lines** FastTab.
- If you select **No**, the **Bin Code** field value on the **Lines** FastTab remains the same.



# Set up configurable codes for items

Article • 7/31/2025 • 2 min read

You can configure unique codes and captions on the **Inventory Setup** page.

To setup the configurable code for inventory set up, follow these steps:

1. Select the Search icon , enter **Inventory Setup**, and then choose the related link. The **Inventory Setup** page opens.
2. On the **Configurable Codes** FastTab, the codes determine how captions appear on the **Item Card** page. You can configure up to five customizable attribute codes (Configurable Code 01 to 05) by selecting values in the **Code** field on the **Configurable Codes** page. These codes determine how captions and classifications appear across related pages.
3. On the **Item Card** page, on the **Configurable Codes** FastTab, when you select a value in the **Configurable Code 01** to **Configurable Code 05** fields on the **Sales & Receivables Setup** page, the caption of the **Configurable Code 01** field on the **Vendor Card** page automatically updates to match the caption defined for the selected code on the **Configurable Codes** page.

You can configure values for **Configurable Code 01** to **05** fields by selecting appropriate options from the **Code** field on the **Configurable Code Values** page.

If any of the field values are the same, the system displays an error message.



# Set up configurable codes for customers

Article • 9/15/2025 • 2 min read

You can configure unique codes and captions in the sales and receivables setup.

To set up the configurable code, follow these steps:

1. Select the Search icon , enter **Sales & Receivables Setup**, and then choose the related link. The **Sales & Receivables Setup** page opens.
2. On the **Configurable Codes** FastTab, you can configure up to five customizable attribute codes (Configurable Code 01 to 05) by selecting values in the **Code** field on the **Configurable Codes** page. These codes determine how captions and classifications appear across related pages.
3. On the **Customer Card** page, on the **Configurable Codes** FastTab, when you select a value in the **Configurable Code 01 to Configurable Code 05** fields on the **Sales & Receivables Setup** page, the caption of the **Configurable Code 01 to Configurable Code 05** fields on the **Customer Card** page automatically updates to match the caption defined for the selected code on the **Configurable Codes** page.

You can configure values for the configurable code related fields by selecting appropriate options from the **Code** field on the **Configurable Code Values** page.

If any of the field values are the same, the system displays an error message.

## Note

On the **Customers** page, you can add configurable code fields only by using the **Personalize** action.



# Set up configurable codes for vendors

Article • 9/15/2025 • 2 min read

You can configure unique codes and captions on the **Purchases & Payables Setup** page.

To configure setup the configurable code for purchases and payables code, follow these steps:

1. Select the Search icon , enter **Purchases & Payables Setup**, and then choose the related link. The **Purchases & Payables Setup** page opens.
2. On the **Configurable Codes** FastTab, you can configure up to five customizable attribute codes (configurable code 01 to 05) by selecting values from the **Code** field on the **Configurable Code** page. These codes determine how captions and classifications appear across related pages.
3. On the **Vendor Card** page, on the **Configurable Codes** FastTab, when you select a value in the **Configurable Code 01 to Configurable Code 05** fields on the **Purchases & Payables Setup** page, the caption of the **Configurable Code 01 to Configurable Code 05** fields on the **Vendor Card** page automatically updates to match the caption defined for the selected code on the **Configurable Codes** page.

You can configure values for the configurable code related fields by selecting appropriate options from the **Code** field on the **Configurable Code Values** page.

If any of the field values are the same, the system displays an error message.

## Note

On the **Vendors** page, you can add configurable code fields only by using the **Personalize** action.



# Invoice text list

Article • 3/10/2026 • 3 min read

You can configure custom text descriptions that appear as comment lines in invoices and credit memos for various transaction types and languages.

To configure the invoice texts setup, follow these steps:

- 1. Select the search icon , enter **Invoice Text List**, and then choose the related link.  
The **Invoice Text List** page opens.
- 2. On the action bar, select new to create a new invoice text entry.
- 3. Enter the required information in the following fields:

| Field            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Transaction Type | Select one of the following transaction types: <i>Sales Invoice</i> , <i>Sales Credit Memo</i> , <i>Purchase Invoice</i> , or <i>Purchase Credit Memo</i> .                                                                                                                                                                                                                                                                                                                 |
| Language Code    | Select the language from the language table. This field provides a lookup to the language table.                                                                                                                                                                                                                                                                                                                                                                            |
| Table No.        | This field value is automatically populated based on the selected Transaction Type: For sales invoices, the <b>Table No.</b> field value is automatically set to <i>110</i> . For sales credit memos, the <b>Table No.</b> field value is automatically set to <i>6660</i> . For purchase invoices, the <b>Table No.</b> field value is automatically set to <i>120</i> . For purchase credit memos, the <b>Table No.</b> field value is automatically set to <i>6650</i> . |
| Field No.        | Specifies the number of the selected field from the filtered table, based on the <b>Transaction Type</b> field value.                                                                                                                                                                                                                                                                                                                                                       |
| Field Caption    | Automatically populated based on the selected field. For base fields, the corresponding language package must be installed to display translated captions. Alternatively, custom text can be entered manually.                                                                                                                                                                                                                                                              |
| Description      | You can enter the custom text that appears as a comment line. Keep descriptions within 100 characters to avoid truncation.                                                                                                                                                                                                                                                                                                                                                  |

## Using invoice texts in documents

When the relevant action is used, the system automatically inserts invoice text comment lines if a matching invoice text configuration exists.



- For purchase invoice, invoice texts are inserted when the **Get Receipt Lines** action is used.
- For purchase credit memo, invoice texts are inserted when the **Get Return Shipment Lines** action is used.
- For sales invoice, invoice texts are inserted when the **Get Shipment Lines** action or **Combine Shipment By** report is used.
- For sales credit memo, invoice texts are inserted when the **Get Return Receipt Lines** action is used.
- The required lines must be selected and confirmed by selecting **OK**.

## Retrieval conditions

Invoice text lines are added when:

- Invoice text lines are added when the **Transaction Type** field value matches the processed document.
- For sales documents, the **Language Code** field value on the **Invoice Text List** page must match the bill-to customer's language code.
- If bill-to customer is not specified, the sell-to customer language code must match.
- For purchase documents, the **Language Code** field value on the **Invoice Text List** page must match the pay-to vendor's language code.
- If the pay-to vendor is not specified, the buy-from vendor language code must match.
- A valid invoice text setup must exist for the selected **Table No.** and **Field No.** fields.

### Note

- Descriptions exceeding 100 characters are truncated without generating errors. If no matching configuration is found, standard behavior is applied, and only default comment lines are created.
- All invoice text fields are mandatory. Each setup must be unique per **Transaction Type**, **Language Code**, **Table No.**, and **Field No.** fields with table relations enforced to ensure language table integrity.



# Validate external document number on sales release and posting

Article • 4/22/2026 • 2 min read

The system validates the **External Document No.** field value at release or posting based on the **External Document No. Check Mode** field configuration.

## Affected sales document types

The system enforces validation of the **External Document No.** field for the following sales document types:

- Sales Quote (validated at Release)
- Blanket Sales Order (validated at Release)
- Sales Order (validated at Release/Posting)
- Sales Invoice (validated at Release/Posting)
- Sales Return Order (validated at Release/Posting)
- Sales Credit Memo (validated at Release/Posting)

## Validation behavior

The system validates the **External Document No.** field on sales documents based on the value selected in the **External Document No. Check Mode** field and the **Ext. Doc. No. Mandatory** toggle.

- When the **External Document No. Check Mode** field value is set to *On Release*.  
If you try to release a sales document without entering a value in the **External Document No.** field, the system displays an error and the document remains open. Enter a value in the **External Document No.** field and release the document again to proceed.
- When the **External Document No. Check Mode** field value is set to *On Posting*.  
You can release a sales document without entering a value in the **External Document No.** field. However, if the field is still blank when you try to post the document, the system displays an error and does not create any entries. Enter a value in the **External Document No.** field and post the document again to proceed.
- When the **Ext. Doc. No. Mandatory** toggle is turned off.  
The system does not validate the **External Document No.** field at any stage. You can release and post sales documents with the field left blank, and no error is raised.



# Salesperson Source

Article • 5/27/2026 • 1 min read

You can configure the source from which the salesperson code is derived on sales documents. By default, Business Central derives the salesperson code from the Bill-To Customer. You can change this configuration so that the salesperson code is derived from the Sell-To Customer instead, providing more accurate salesperson assignment when the selling and billing customers differ.

## Configure the salesperson source

To configure the salesperson source, follow these steps:

1. Navigate to the **Sales & Receivables Setup** page.
2. In the **Salesperson Source** field, select one of the following options:
  - **Bill-To Customer:** The system derives the salesperson code from the Bill-To Customer. This is the default behavior.
  - **Sell-To Customer:** The system derives the salesperson code from the Sell-To Customer.

The salesperson source is configured.

### Note

- When the *Sell-To Customer* option is selected and the Sell-To Customer and the Bill-To Customer are the same, the salesperson code behavior is unchanged.
- When the *Sell-To Customer* option is selected and the Sell-To Customer has a blank salesperson code, the salesperson code on the sales document is set to blank.

## Manage salesperson code in sales documents

The system automatically updates the **Salesperson Code** field value on the sales document based on the **Salesperson Source** setting on the **Sales & Receivables Setup** page when the **Sell-To Customer No.** is validated on the following pages:

- Sales Order
- Sales Quote
- Blanket Sales Order
- Sales Invoice
- Sales Credit Memo



- Sales Return Order

Further, you can manually update the **Salesperson Code** field value as required.

 Note

- When a Ship-To Code with a blank salesperson code is set on the sales document, the system uses the **Salesperson Source** setting to determine the fallback salesperson code.
- When *Sell-To Customer* is selected and the Ship-To Code has a blank salesperson code, the system derives the salesperson code from the Sell-To Customer.



# Integrations

Article • 9/24/2025 • 1 min read

The Apteian Essentials extension has been integrated with the following extensions:

- [Apteian Inventory Overview](#)
- [Apteian Pricing Matrix](#)
- [Apteian Process Manufacturing](#)



# Aptean Inventory Overview

Article • 7/30/2025 • 1 min read

When the Aptean Essentials extension is used in conjunction with the Aptean [Inventory Overview](#) extension, you can use **Item Purchaser Filter** field to filter items based on item purchasers on the **Inventory Overview** page. For more information, see [Manage the Inventory Overview page](#).



# Aptean Pricing Matrix

Article • 7/30/2025 • 1 min read

When the Aptean Essentials extension is used in conjunction with the Aptean [Pricing Matrix](#) extension, you can use the **Item Purchaser** field to filter items based on item purchasers on the **Alternate Cost Worksheet** page. For more information, see [Manage the Alternate Cost Worksheet page](#).



# Aptean Process Manufacturing

Article • 9/24/2025 • 1 min read

When the Aptean Essentials extension is used in conjunction with the Aptean [Process Manufacturing](#) extension, you can control how the system rounds the value in the **Quantity per** field based on the **Production Order Components** page. For more information, see [Set up manufacturing components](#).

