

# User Manual

# Aptean Food and Beverage ERP

**Logistics for Drink-IT**

Product Documentation



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# Release notes

Article • 7/21/2026 • 2 min read

To view what's new or changed in each release of the Aptean Beverage Logistics extension, Drink-IT Edition, select the specific release version.

| Date           | Release version            | Description       |
|----------------|----------------------------|-------------------|
| July 2026      | <a href="#">2603.0.0.0</a> | Major release     |
| June 2026      | <a href="#">2602.2.0.0</a> | Minor release     |
| May 2026       | <a href="#">2602.1.0.0</a> | Minor release     |
| April 2026     | <a href="#">2602.0.0.0</a> | Major release     |
| March 2026     | <a href="#">2601.4.0.0</a> | Stability release |
| February 2026  | <a href="#">2601.3.0.0</a> | Platform release  |
| February 2026  | <a href="#">2601.2.0.0</a> | Stability release |
| February 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="#">2506.2.0.0</a> | Stability release |
| October 2025   | <a href="#">2506.1.0.0</a> | Stability release |
| September 2025 | <a href="#">2506.0.0.0</a> | Feature release   |
| August 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="#">2503.0.0.0</a> | Feature release   |
| May 2025       | <a href="#">2502.1.0.0</a> | Stability release |
| April 2025     | <a href="#">2502.0.0.0</a> | Feature release   |
| April 2025     | <a href="#">2501.4.0.0</a> | Platform release  |
| April 2025     | <a href="#">2501.3.0.0</a> | Stability release |
| March 2025     | <a href="#">2501.2.0.0</a> | Stability release |



|                |                                 |                   |
|----------------|---------------------------------|-------------------|
| March 2025     | <a href="#">2501.1.0.0</a>      | Stability release |
| March 2025     | <a href="#">2501.0.0.0</a>      | Feature release   |
| February 2025  | <a href="#">2405.6.0.0</a>      | Stability release |
| February 2025  | <a href="#">2405.5.0.0</a>      | Stability release |
| February 2025  | <a href="#">2405.4.0.0</a>      | Platform release  |
| January 2025   | <a href="#">2405.3.0.0</a>      | Stability release |
| November 2024  | <a href="#">2405.2.0.0</a>      | Stability release |
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| October 2024   | <a href="#">2405.0.0.0</a>      | Feature release   |
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| September 2024 | <a href="#">2404.0.0.0</a>      | Feature release   |
| September 2024 | <a href="#">2403.2.0.0</a>      | Stability release |
| September 2024 | <a href="#">2403.1.0.0</a>      | Stability release |
| July 2024      | <a href="#">2403.0.0.0</a>      | Feature release   |
| June 2024      | <a href="#">2402.1.0.0</a>      | Platform release  |
| June 2024      | <a href="#">2402.0.0.0</a>      | Feature release   |
| May 2024       | <a href="#">2401.1.0.0</a>      | Platform release  |
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| March 2024     | <a href="#">2312.1.0.0</a>      | Stability release |
| January 2024   | <a href="#">2312.0.0.0</a>      | Feature release   |
| July 2023      | <a href="#">23.500.106726.0</a> | Feature release   |
| March 2023     | <a href="#">20.202303.0.0</a>   | Feature release   |
| January 2023   | <a href="#">20.202301.0.0</a>   | Feature release   |
| November 2022  | <a href="#">20.202211.0.0</a>   | Feature release   |
| September 2022 | <a href="#">20.202209.0.0</a>   | Feature release   |



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|--------------|----------------------------------|-----------------|
| July 2022    | <a href="#">20.202207.0.0.md</a> | Feature release |
| May 2022     | <a href="#">20.202205.0.0</a>    | Feature release |
| March 2022   | <a href="#">18.202203.0.0</a>    | Feature release |
| January 2022 | <a href="#">18.202201.0.0</a>    | Feature release |



# 2603.0.0.0

Release Note • 7/21/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the **Route Planning Worksheet** page correctly reflects the **Vehicle Code** and **Driver Code** field values set on the **Sales Order** page, even when those values differ from the route defaults. When releasing a sales order with vehicle or driver values that differ from the existing route planning entry, the system prompts you to confirm whether to create a new route planning worksheet. If you confirm, a new worksheet is created and linked to the sales order. This behaviour applies only to routes that are not configured as a multiple order route. For those routes, the **Vehicle Code** and **Driver Code** fields on the **Route Planning Worksheet** page are not editable.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                   |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 376973 | The system fails to complete the <b>Create Pick</b> action within a reasonable time, causing significant performance delays when creating and printing picks. |



# 2602.2.0.0

Release Note • 6/24/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the **Status** field appears on the **Vehicle** page, with the same options as the existing **Status** field on the **Driver** page. The system prevents vehicles with a status of *Inactive* from being selected as a trailer on all logistical documents, and as a vehicle on the **Route** page and route planning lines.

## UI/UX changes

The **Status** field has been added to the **Vehicle** page.



# 2602.1.0.0

Release Note • 5/27/2026 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                          |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 368321 | The system fails to update the <b>Shipment Date</b> field value on the <b>Transfer Order</b> page after a warehouse pick has been registered for the transfer order. |



# 2602.0.0.0

Release Note • 4/22/2026 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                  |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 357033 | The system fails to retain the <b>Opening Time</b> and <b>Closing Time</b> field values when the <b>Shipment Date</b> field value is updated on a sales order, and clears these field values instead.        |
| 331831 | An error occurs when creating a purchase order for a vendor with a <b>Shipping Agent Service Code</b> field value. This issue occurs only when the Aptean <a href="#">Essentials</a> extension is installed. |



# 2601.4.0.0

Release Note • 3/25/2026 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Beverage Event Management extension, Drink-IT Edition. For more information, see [What's new in Beverage Event Management, version 2601.2.0.0.](#)



# 2601.3.0.0

Release Note • 2/26/2026 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the references of deprecated *Document Attachment FactBox* part has been removed on the *RoutePlanningWorks107FDW* page to ensure compatibility with Business Central, version 28.



# 2601.2.0.0

Release Note • 2/25/2026 • 2 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition,

- Common warnings in various objects have been removed or marked as obsolete, as part of a code cleanup activity to support major update of Business Central, version 28.
- Updates have been made to ensure interoperability with the recent changes in the Aptean Beverage [Event Management](#) extension. To know more, see [What's new in Event Management, version 2601.1.0.0](#).

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 347885 | The system fails to update the <b>Shipment Date</b> field value in the sales line when changing the <b>Shipment Date</b> field value from the <b>Route Planning Worksheet</b> page.                                                                                                                                                                                                                                                                           |
| 357413 | The system fails to update the <b>Shipment Date</b> field value on the sales header when changing the <b>Route</b> and <b>Shipment Date</b> field values. Additionally, the system does not update the corresponding fields in the sales lines.                                                                                                                                                                                                               |
| 351763 | The system does not allow the sales order to be released after changing the shipment date when warehouse picks have been bundled on combined warehouse shipments. The system displays a confirmation message to combine shipments. However, regardless of whether the user selects yes or no, an error occurs stating that no shipment lines are created. Additionally, the system leaves the sales order in the open status and prevents further processing. |



# 2601.1.0.0

Release Note • 2/6/2026 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                    |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 355253 | An error occurs on the <b>Sales Order</b> page when creating a sales order for a customer associated with a route that has no customer shipment dates defined. |



# 2601.0.0.0

Release Note • 1/28/2026 • 2 min read

## Features

With the feature added in this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the Aptean [Feature Control](#) extension allows you to enable or disable the Aptean Beverage Logistics extension, Drink-IT Edition, based on your implementation needs. When the application is disabled, its functionality is no longer available to use. If any other extensions depend on the Aptean Beverage Logistics extension, Drink-IT Edition, the system automatically disables those extensions as well. This prevents you from accessing dependent functionality and avoid configuration conflicts, ensuring the system remains in a consistent and supported state.

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 339870 | The system fails to update the <b>Shipment Day</b> field value on the <b>Source Route</b> page when the <b>Shipment Day</b> field already contains a value on the <b>Sales Order</b> or <b>Purchase Order</b> page. It only updates the source route when the <b>Shipment Day</b> field value is initially blank. Additionally, the <b>Delivery Sequence</b> field value does not update correctly when changing the <b>Route</b> field value on the <b>Sales Order</b> , <b>Sales Return Order</b> , <b>Purchase Order</b> , and <b>Purchase Return Order</b> pages. |
| 341126 | The system fails to update the <b>Driver</b> , <b>Driver 2</b> , and <b>Vehicle</b> field values on the <b>Sales Order</b> page and <b>Posted Sales Shipment</b> pages, even though the <b>Route Planning Worksheet</b> page is correctly updated with the corresponding field values.                                                                                                                                                                                                                                                                                |
| 339347 | The system fails to copy the <b>Delivery from time</b> and <b>Delivery to time</b> field values from the transfer order to the posted transfer shipment when posting a transfer order that contains delivery time window information, resulting in missing delivery time window data after posting.                                                                                                                                                                                                                                                                   |



# 2506.2.0.0

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

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                    |
|--------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 335040 | The system fails to update the <b>Gross Weight</b> field value on the <b>Warehouse Shipment</b> page.                                                          |
| 335590 | The system fails to populate the delivery sequence on the <b>Sales Order</b> page when a customer is assigned a delivery sequence on the related source route. |



# 2506.1.0.0

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

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 333594 | The system deletes tax charge lines from a sales order when the route is changed on the <b>Route Planning Worksheet</b> page. Additionally, after updating the shipment date related to the new route, the existing tax charges are removed automatically. |



# 2506.0.0.0

Release Note • 9/24/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition,

- The system supports direct navigation from the **Route Planning No.** field on the **Sales Order** and **Warehouse Shipment** pages to the **Route Planning Worksheet** page.
- The system automatically updates the **Logistic Status** field value of the related sales orders when a warehouse pick is deleted.
  - You can then create new pick lines for the related sales order based on your requirement.
  - The **Logistic Status** field value on the **Sales Order** page changes (for example, from *Whse to Pick* to *Whse to Ship*), reflecting that the pick has been deleted.
  - After you register the pick for the newly created warehouse shipment, the logistic status is updated accordingly.

This ensures that sales orders return to the correct status when picks are deleted, allowing you to create new picks without manual adjustments.



# 2505.0.0.0

Release Note • 8/27/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the **Shipping Agent Code** and **Shipping Agent Service Code** field values on the **Vendor Card** page are synchronized between this extension and the Aptean Food and Beverage extensions.

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 308236 | The system incorrectly creates a warehouse receipt when selecting the <b>Yes</b> button on the combine warehouse receipt pop-up window after executing the <b>Create/ Modify Warehouse Receipt</b> action on the <b>Route Planning Worksheet</b> page. This issue arises when the warehouse receipt is associated with a location having multiple item lines instead of separate warehouse receipts for each location.                                                            |
| 308967 | The system fails to generate the <b>Route Planning No.</b> field value on the <b>Sales Return Orders</b> , <b>Purchase Orders</b> , and <b>Purchase Return Orders</b> pages when executing the <b>Release</b> action. This issue occurs when the <b>Shipment Date</b> field value is left blank on the <b>Sales Return Order</b> page and the <b>Default Expected Receipt Date</b> field value is left blank on the <b>Purchase Order</b> and <b>Purchase Return Order</b> pages. |



# 2504.0.0.0

Release Note • 7/30/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the system inherits the **Shipping Agent Code** and **Shipping Agent Service Code** field values on the **Posted Purchase Receipt** page from the **Purchase Order** page.

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                                                           |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 308144 | The system incorrectly updates all warehouse shipments that have the <b>Driver</b> and <b>Route Planning No.</b> field values set to blank instead of updating only the selected warehouse shipment on the <b>Warehouse Shipments</b> page. This issue arises when updating the <b>Route</b> field value for a sales order related to the specific warehouse shipment on the <b>Sales Order</b> page. |
| 306176 | A performance issue occurs when the shipment date is changed on the <b>Route Planning Worksheet</b> page for a released sales order, leading to duplicate tax calculation.                                                                                                                                                                                                                            |



# 2503.0.0.0

Release Note • 7/2/2025 • 1 min read

## Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Beverage Event Management extension, Drink-IT Edition. To know more, see [What's new in Beverage Event Management, version 2501.0.0.0](#).

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                      |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 306177 | The system incorrectly displays an error message when attempting to update the shipment date using the <b>Move Route Planning</b> action on the <b>Route Planning Worksheet</b> page when conditions lines exist for the associated sales order. |

 **Note**

If a warehouse document exists, the route cannot be changed to another route that includes a different location. You need to delete the warehouse shipment and reopen the order and change the location manually.



# 2502.1.0.0

Release Note • 5/12/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the *OnBeforeCheckIfWhseActivityLinesExist107FDW* integration event has been added to the *SalesHeader107FDW* table. This event allows external extensions to implement custom logic before the system checks for existing warehouse activity lines.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                 |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 289140 | The system incorrectly sets the <b>Dock Code</b> field value to blank upon executing the <b>Register Rescheduled Delivery</b> action on the <b>Warehouse Shipment</b> page. |



# 2502.0.0.0

Release Note • 4/29/2025 • 1 min read

## Features

With the features added in this release of the Aptean Beverage Logistics extension, Drink-IT Edition,

- The **Logistic Status** field value on the **Sales Order** page is updated according to the setup on the **Logistics Statuses** page when printing the proforma invoice or pick instruction reports. This ensures that the logistic status is consistently maintained across all relevant documents.
- The driver details (such as vehicle, co-driver, and trailer) are carried over from the warehouse shipment to the posted warehouse shipment, ensuring consistency in the logistics details across both the sales and warehouse processes. This functionality works similarly on the purchase and transfer processes, ensuring uniform handling of logistics details across all types of shipments.
- Updates have been made to optimize and improve system performance and reduce database locking issues during warehouse and tax-related operations.



# 2501.4.0.0

Release Note • 4/17/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the *MoveRoutePlanningRequest* procedure has been added to the *RoutePlanHookPubl107FDW* codeunit to enable external access to route planning logic.



# 2501.3.0.0

Release Note • 4/9/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the route planning functionality has been enhanced to improve driver and co-driver management, eliminating the need for external tracking in Excel. The following enhancements have been made.

- Only active drivers and co-drivers (with the **Status** field value set to *Active* on the **Drivers** page) are displayed on the following pages:
  - Routes
  - Route Planning Worksheet
  - Warehouse Shipment
  - Warehouse Receipt
  - Sales Order
  - Sales Return Order
  - Purchase Order
  - Purchase Return Order
  - Transfer Order

The system does not display drivers with an inactive or terminated status in these documents.

- If an inactive or terminated driver/co-driver is selected in a document, the system displays a notification indicating their status.
- When a driver or co-driver is linked to an employee number, the **Status** field automatically inherits its value from the associated **Employee Card** page, and you cannot edit it manually.
- When you change a driver or co-driver in the route planning worksheet or warehouse documents, the system updates all related documents during the posting process.

For more information, see [Setting up drivers](#).

## UI/UX changes

The **Status** and **Type** fields have been added to the **Drivers** page.



# 2501.2.0.0

Release Note • 3/25/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                      |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 277902 | An error occurs when creating customer shipment dates on the <b>Create Shipment Dates</b> page with the <b>Recreate Entries</b> toggle turned on. This issue arises in German localization, preventing the creation or update of shipment dates. |



# 2501.1.0.0

Release Note • 3/21/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                        |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 278563 | The system fails to correctly update and process the license plates, preventing the completion of the reschedule flow when attempting to move a sales order to the reschedule route with the required reschedule fields filled. Additionally, the route-level functionality does not follow the automated reschedule process, requiring a manual movement instead. |



# 2501.0.0.0

Release Note • 3/18/2025 • 4 min read

## Features

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition,

- The system assigns values in the **Agent** and **Agent Service** fields on the **Sales Order** page when a ship-to address is used. These values are determined based on the type of route and available data, ensuring accurate shipping information.
  - For multi-order routes, the values are always derived from the **Routes** page.
  - For non-multi-order routes:
    - If the route is specified, the values are derived from the **Routes** page.
    - If the route is not specified, the values are derived from the **Ship-to Code** field on the **Customer Card** page.
    - If the **Ship-to Code** field value is not specified, the values are derived from the **Customer Card** page itself.
    - If all values are empty, the **Agent** and **Agent Service** fields on the **Sales Order** page will remain blank.
  - When a ship-to address is used:
    - If the **Shipping Agent Code** and **Shipping Agent Service Code** field values are specified on the **Ship-to Address** page, those values are used.
    - If these fields are empty on the **Ship-to Address** page, the **Agent** and **Agent Service** field values on the **Sales Order** page will remain blank.
- The system displays the sell-to customer address instead of the default ship-to address on the **Route Planning Worksheet** page for sales return orders. This enhancement improves efficiency in route planning by ensuring planners have visibility into the correct customer location when scheduling return pickups. For more information, see [Setting up logistics](#).
- The logistic statuses are correctly updated in alignment with the backorder process functionality on the **Backorder Sales Lines** page, ensuring accurate shipment tracking. The backorder process functionality includes the following types:
  - *No Backorder*: The warehouse shipment lines and sales order lines are updated with the picked quantity, and the warehouse shipment header status changes to *Completely Shipped*.
  - *Backorder in Order*: The warehouse shipment lines are updated with the picked quantity, and the warehouse shipment header status changes to *Completely Shipped*.
  - *Backorder in Blanket Order*: The warehouse shipment lines are updated with the picked quantity, the warehouse shipment header status changes to *Completely Shipped*, and a blanket sales order is created for the remaining quantity.



: The warehouse shipment lines are updated with the picked quantity, the warehouse shipment header status changes to *Completely Shipped*, and a blanket sales order is created for the remaining quantity.

The **Backorder Process** action can be executed from the **Route Planning Worksheet** page. If the **Backorder Process** action on the **Backorder Sales Lines** page is not used, the warehouse shipment header status remains *Partially Shipped*, and the standard logistic status process is followed accordingly.

- The shipment date, route number, and drive number can be updated in the sales orders and/or warehouse shipment without creating a new document. This enhancement improves flexibility in logistics planning and ensures accurate warehouse operations. When changing the shipment date, route, or drive number using the **Move Route Planning** action on the **Route Planning Worksheet** or **Route Planning Request** page, the system updates the existing sales order and/or warehouse shipment. The updated information is reflected on the associated warehouse shipment document, if it has already been created. These values cannot be updated if an open pick exists for the warehouse shipment document. License plates and registered warehouse picks will also be linked to the correct route planning number. The route number and shipment date are also updated directly on the **Sales Order** page when there are no open warehouse activities. For more information, see [How to use route planning worksheet in logistics](#).

## UI/UX changes

The **Show Customer Address for Sales Return Order** toggle has been added to the **General** FastTab of the **Logistics Setup** page.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                    |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 272566 | The system fails to update the <b>Logistics Status</b> field value to <i>LOADED</i> on a sales order when the license plate status is changed to <i>LOADED</i> and no backorder exists. This issue occurs because the status update is not triggered based on the warehouse statuses setup, preventing accurate tracking of shipment progress. |



# 2405.6.0.0

Release Note • 2/21/2025 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                        |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 254454 | The system incorrectly generates customer shipment days on the <b>Customer Card</b> page by considering only the base calendar code, ignoring the working and non-working days defined in the customized calendar. |



# 2405.5.0.0

Release Note • 2/6/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the **Calculate Returned Quantities** page caption associated with the **Return Control** page has been updated to remove erroneous spelling and enhance readability. This enhancement addresses the issue reported in bug ID #259546.

## UI/UX changes

The **CalcReturnQuantity107FDW** page associated with the **Return Control** page has been renamed as the **Calculate Returned Quantities** page.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------|
| 259546 | The system displays an incorrect caption for the <b>Calculate Returned Quantities</b> page associated with the <b>Return Control</b> page. |



# 2405.4.0.0

Release Note • 2/3/2025 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the *CreateWarehouseReceipt* procedure in the *RoutePlanningWork107FDW* codeunit has been made public to be accessible from other modules, improving efficiency.



# 2405.3.0.0

Release Note • 1/13/2025 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 252075 | The system incorrectly updates the <b>Document Date</b> field value on the <b>Sales Order</b> page after entering the customer name, leading to an incorrect <b>Due Date</b> field value calculation. Additionally, the system incorrectly calculates the <b>Document Date</b> , <b>Posting Date</b> , <b>VAT Date</b> , and <b>Due Date</b> field values when the <b>Shipment Date</b> or <b>Route</b> field value is updated on the <b>Sales Order</b> page or the associated <b>Route Planning Worksheet</b> page. |
| 251437 | The system fails to display an error on the <b>Vehicles</b> page when a vehicle record used on the <b>Routes</b> or <b>Sales Order</b> page is deleted.                                                                                                                                                                                                                                                                                                                                                               |
| 252362 | The system fails to calculate the <b>Closing Time</b> field value on the <b>Customer Shipment Dates</b> page based on the <b>Cut-off No. of Days</b> field value on the <b>Source Routes</b> page for the associated customer.                                                                                                                                                                                                                                                                                        |



# 2405.2.0.0

Release Note • 11/22/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                               |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 240235 | The system fails to display the sales order number in the <b>Source No.</b> field on the <b>Route Planning Request</b> page when the related sales order is created using the <b>Copy Document</b> action from an existing sales order with value in the <b>Route Planning No.</b> field. |



# 2405.1.0.0

Release Note • 11/6/2024 • 1 min read

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                                                        |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 238148 | The system displays an incorrect error message by associating the license plate number with a deleted sales order during shipment validation, instead of the current warehouse shipment. This issue occurs when an ad hoc movement is used to transfer the shipped items from a license plate within the warehouse to an incomplete license plate during handling. |



# 2405.0.0.0

Release Note • 10/23/2024 • 1 min read

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                                        |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 201995 | The system does not update the <b>Ship/Receipt-To City</b> and <b>Ship/Receipt-To Name</b> fields on the <b>Route Planning Request</b> page when the <b>Ship-to Group</b> fields on the <b>General</b> FastTab and the <b>Ship-to</b> field on the <b>Shipping and Billing</b> FastTab of the <b>Sales Order</b> page are changed. |
| 211772 | An error occurs on the <b>Warehouse Shipment</b> page while creating a warehouse pick for a fully picked warehouse shipment line.                                                                                                                                                                                                  |



# 2404.1.0.0

Release Note • 10/18/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition,

- You can select values for the **Delivery Type** field from a lookup table in the route planning request lines of the **Route Planning Worksheet** page, which were previously filled in manually and then validated.
- The **Shipping Agent Code** field on the **Warehouse Receipt** page has been updated based on the value entered in the **Route** field on the **Purchase Order** page. If the **Route** field is empty, the shipping agent code on the **Warehouse Receipt** page is inherited from the shipping agent code on the **Purchase Order** page.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                    |
|--------|--------------------------------------------------------------------------------------------------------------------------------|
| 236200 | The system displays an incorrect error message on the <b>Sales Order</b> page when a non-working day is selected for shipment. |



# 2404.0.0.0

Release Note • 9/24/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the **Receiving Weight** field is updated with the **Shipping Weight** field value on the **Route Planning Worksheet** page when the **Receiving Weight Equal to Shipping Weight** toggle on the **Logistics Setup** page is turned on.

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                          |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 181812 | The system displays an incorrect message when the <b>Move Route Planning</b> action is executed on the <b>Route Planning Worksheet</b> page.                                                                                                                                         |
| 211950 | An error occurs when selecting the <b>No.</b> field value on the <b>Sales Order</b> or <b>Purchase Order</b> card page. This issue arises when <i>LOGISTICBASIC107FDW</i> is added in the <b>Permission Set</b> field, and the super user is removed from the <b>User Card</b> page. |



# 2403.2.0.0

Release Note • 9/16/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, the *SendEmailToCust* function has been updated to modify several parameters, ensuring compatibility with Business Central, version 25.



# 2403.1.0.0

Release Note • 9/16/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, Drink-IT Edition, modifications have been made to accommodate the following changes:

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

### ! Note

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



# 2403.0.0.0

Release Note • 7/15/2024 • 1 min read

## Enhancements/Modifications

To improve performance, the logistics FactBox has been disabled from several documents. This can be done by selecting the **Hide Logistics FactBox** checkbox on the **User Setup** page.

## UI/UX changes

The **Hide Logistics FactBox** checkbox is added on the **User Setup** page.



# 2402.1.0.0

Release Note • 6/27/2024 • 1 min read

## Enhancements/Modifications

This release of Aptean Beverage Logistics, Drink-IT Edition has the following enhancements:

- The *OnBeforeIntlPickedAppliedToSourceDocument*, *OnAfterWhseStatusRuleFiltersSet*, and *OnBeforeIntlOrderShippedAppliedToSourceDocument* integration events are added to the *GeneralSalesPub107FDW* codeunit to enhance customization.
- The *CreateWarehouseShipment* procedure is changed from *Internal* to *Public*.



# 2402.0.0.0

Release Note • 6/13/2024 • 1 min read

## Enhancements/Modifications

With this release of the Aptean Beverage Logistics extension, code changes were made to the permission sets to optimize performance.



# 2401.1.0.0

Release Note • 5/17/2024 • 1 min read

## Enhancements/Modifications

An event has been added to the *OnBeforeSetAutomaticStatusDocReleased* codeunit to skip the automatic status on the released sales document.



# 2401.0.0.0

Release Note • 4/4/2024 • 1 min read

## Enhancements/Modifications

This release of the Aptean Beverage Logistics, Drink-IT Edition has the following enhancements:

- To accommodate the use of transfer orders on the **Route Planning Worksheet** page, the **Shipping Weights** and **Shipping Pallet** fields have been corrected on the **Route Planning Request** page.
- You can create and open warehouse receipt for sales document and warehouse shipment for purchase document from Route Request Line on the **Route Planning Worksheet** page.

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                               |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 190886 | On the <b>Transfer Order</b> page, when the shipment is posted for the Transfer Order, then the <b>Shipping Weight</b> and <b>Receiving Weight</b> fields and the <b>Route Planning Overview</b> FactBox on the <b>Route Planning Request</b> page have incorrect values. |



# 2312.1.0.0

Release Note • 3/20/2024 • 1 min read

## Enhancements/Modifications

You can create Periodic Invoice and Periodic Memos only for **Blanket Sales Order** which have the **Logistics Status** with **Allowed on Create Sales Invoice** checkbox selected. For more information, see [Setting up Logistics Statuses](#).

## Resolved issues

The following issue has been resolved in this release.

| ID     | Description                                                                                                                                                                                                                                                                                                 |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 145145 | Upon changing the <b>Shipment Date</b> on the <b>Shipping and Billing</b> FastTab to a date not listed in the <b>Customer Shipment Dates</b> page, when releasing a Sales Order, the system fails to display the message box with the options to execute/cancel the release on the <b>Sales Order</b> page. |



# 2312.0.0.0

Release Note • 1/10/2024 • 3 min read

## Enhancements/Modifications

This release of Aptean Beverage Logistics, Drink-IT Edition has the following enhancements:

- Aptean Beverage Logistics is integrated with Aptean Beverage [Empty Goods and Deposit Management](#) extension to retrieve the Shipping Location and Receipt Location on Routes, for Return Entry and Return Orders.
- Technical events have been added on the **Route Planning Worksheet** page to enable the filters.
- From the Warehouse Shipment, you can create a pick by entering a value in the field associated with the Transport Validation type selected on the **Warehouse Template** page.
- You can create a pick on the **Warehouse Shipment** page, using a **Warehouse Template** with **Transport Validation Type** set as *Vehicle* only when the **Vehicle Code** and/or **Trailer** fields on the **Logistics** FastTab of the **Warehouse Shipment** page have values. Else, you will receive an error.
- Modifications were made to this extension to use the **Update to next Logistic Status** and **Update to Previous Logistic Status** actions on the **Blanket Purchase Order** page. For more information, refer to [Training](#).
- A warehouse pick is not created when not allowed by the logistic status of a sales order.

## Resolved issues

The following issues have been resolved in this release.

| ID     | Description                                                                                                                                                                                               |
|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 248008 | Unable to create <b>Return Order</b> for Empty Goods and for Full Goods while executing the <b>Apply Changes</b> action on the <b>Return Entry</b> page opened from the <b>Route Planning Worksheet</b> . |
| 254764 | The <b>Update to next Logistic Status</b> action does not work on the <b>Blanket Purchase Order</b> page.                                                                                                 |
| 256549 | The <b>Route Planning Request</b> field values on the <b>Route Planning Worksheet</b> page are not correctly updated on changing the <b>Sell-to Customer No.</b> on the <b>Sales Order</b> page.          |
| 248051 | The <b>Shipment Date</b> is not correctly updated on the <b>Transfer Order</b> page from the specified Route.                                                                                             |
| 141476 | On the <b>Route Planning Worksheet</b> page, on the <b>Route Planning Request</b> FastTab, <b>Sell-To/Buy From No.</b> field is generated with incorrect locations when a transfer order is created.      |



|        |                                                                                                                                                                                                                                                                                                                        |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 145362 | On the <b>Sales Order</b> page, on the <b>General</b> FastTab when the <b>Customer No.</b> is changed, the <b>Sell-To/Buy/From No.</b> , <b>Ship/Receipt-To Name</b> , and <b>Ship/Receipt- To city</b> fields are not changed in the <b>Route Planning Request</b> lines on the <b>Route Planning Worksheet</b> page. |
| 165855 | On the <b>Warehouse Shipment Book</b> page, the <b>Route Planning No.</b> field is not filled but on the <b>Warehouse Shipments</b> page the <b>Route Planning No.</b> field is filled when a warehouse shipment is created.                                                                                           |
| 163421 | The Purchase Order does not inherit the <b>Route</b> field value from the <b>Vendor Card</b> page during creation.                                                                                                                                                                                                     |



# 23.500.106726.0

Release Note • 12/4/2023 • 10 min read

The **Drink-IT Logistics** has been rebranded to **Aptean Beverage Logistics, Drink-IT Edition**.

## Features

| PBI No.                | Description                                                                                                                     |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">242621</a> | Add information on <i>Route</i> and <i>Dock No</i> for <i>Send to Label Automation</i> for LPN (new mix pallet - reprint - etc) |
| <a href="#">242813</a> | New functionality - <i>Allow Pick List</i> to be filtered based on route no.                                                    |

## Resolved issues

| PBI No.                | Description                                                                                |
|------------------------|--------------------------------------------------------------------------------------------|
| <a href="#">246563</a> | Status change to <i>loaded</i> on sales order not correct                                  |
| <a href="#">245890</a> | Enable moving routes by external system                                                    |
| <a href="#">245742</a> | Process No Backorder should update the logistic status of the sales order                  |
| <a href="#">245560</a> | Reschedule License Plates - Transport validations on shipment Bin                          |
| <a href="#">243871</a> | Sales header error when changing the LP Status by AOW                                      |
| <a href="#">243264</a> | Block delete route if route is used in master data and/or documents                        |
| <a href="#">244158</a> | Shipment dates - error when creating in foreign language                                   |
| <a href="#">243209</a> | Suspend status check on changing route in route planning worksheet on multiple order route |

## PBI 242621 - Add information on Route and Dock No for Send to Label Automation for LPN (new mix pallet - reprint - etc)

### What

Add information on Route and Dock No for Send to Label Automation for LPN (new mix pallet - reprint - etc)



## Why

As a warehouse manager, I want the labels to include the information from the Logistic extension, so the warehouse employees know for which route, Dock, etc... the pallet is.

## How

### *Setup in Business Central*

No extra setup needed, except when using other labels and/or integrations in your label automation software.

See also: [Sending Up Label Printing](#)

### *Label automation software*

Adjust your labels and integration to cope with the new fields, added in the JSON.

## PBI 242813 New functionality - Allow Pick List to be filtered based on Route No.

**What** New functionality - Allow Pick List to be filtered based on Route No.

## Why

As a Warehouse Manager, I want the warehouse employees to be able to see information from Logistics on the pick header, so they can filter on this information and easily select the correct pick.

Additional LOG fields are added to the header fields

## How

### *Setup in Business Central.*

1. Choose the Search icon , enter **Locations** and then choose the related link
2. Select the location for which you want to set the validations to the default validations
3. Choose **Configure OWM** in the Ribbon. The OWM Configuration page opens.
4. Choose **Modules on Scanner** in the Ribbon. The Modules on scanner list opens.
5. Choose the **Warehouse Pick Module**. The Module Settings card opens.
6. Choose the **Header Fields** action. The Header Fields list opens.
7. Fill in Lines according to the fields to display in the header. Hover over a field to read a short description.
  - When leaving the **Text Format** field Blank, the standard format is used to display according to the field type.



- When adding a text format (Example: /) in the **Text Format** field, this format is used to display according to the field type. For more information about different formats: [Formatting Values, Dates, and Time](#)

8. Close the Header fields list.

9. Fill in the **Document Header Format** field, using the identifiers from the header field list. (Example: %2 - %1(%3))3. Choose the **Default User Filter** action. The Default User Filter list opens.

10. Fill in Lines per OWM User to default filter in the document list. Hover over a field to read a short description.

11. Close the Default User Filter list.6. Fill in the **Document Filter Format** field, using the identifiers from the header field list. (Example: %2 - %1(%3))

#### Note

- When the Document Header Format field is empty, the standard header is displayed.
- When the Document Filter Format field is empty, you are only able to filter on the first line of the document.
- Best practice is to keep the Document Header Format identical to the Document Filter Format. If necessary, when you want to add extra fields to filter on, add those at the end of the string.

### *Flows on scanner, depending on setup in Default User Filter List*

When

- **No Search String is entered and Default Locked is disabled**
  - First time entering: Complete list
  - Enter filter: # appears for the 2nd header, because it is your last filter, the complete list is filtered on the last filter
  - Enter new filter: # appears for the 2nd header, because it is your last filter, the complete list is filtered on the last filter
  - Enter \* as filter: # disappears, because you emptied your last filter, the complete list is visible
  - Reopening the list: will show you the # when you closed the list when using a filter, because it was your last filter
- **No Search String is entered and Default Locked is enabled**
  - First time entering: Complete list, no prefix because the Locked Default Value is empty.
  - Enter filter: The complete list is filtered on filter on your screen.
  - Enter new filter: The complete list is filtered on filter on your screen.
  - Enter \* as filter: Complete list Reopening the list: Complete list
- **Search String is entered and Default Locked is disabled**
  - First time entering: Filtered list on the Search String, \* appears for the 2nd header



- Enter filter: # appears for the 2nd header, because it is your last filter, the default filtered list is also filtered on the last filter
- Enter new filter: # appears for the 2nd header, because it is your last filter, the default filtered list is also filtered on the last filter
- Enter *as filter: Filtered list on the Search String*, appears for the 2nd header
- Reopening the list: will show you the # when you closed the list when using a filter on the default filter, because it was your last filter, else a \* appears for the 2nd header, because it is your default filter
- **Search String is entered and Default Locked is enabled**
  - First time entering: Filtered list on the Search String, \* appears for the 2nd header
  - Enter filter: \* appears for the 2nd header, because the default is Locked, the default filtered list is also filtered on the last filter
  - Enter new filter: \* appears for the 2nd header, because the default is Locked, the default filtered list is also filtered on the last filter
  - Enter *as filter: Filtered list on the Search String*, appears for the 2nd header
  - Reopening the list: Filtered list on the Search String, \* appears for the 2nd header

## PBI 246563 - Status change to LOADED on sales order not correct

### Why

When in the process the LPN of a Mixed LP or LP the status is changed to LOADED the logistic status of the order should only follow when all License Plates, belonging to 1 Order, are in the status LOADED, the order status will be changed to the logistic status ORDER.

### What

the updated of the logistic status is fixed following the rules.

- Check in the Detailed Warehouse Entries which orders have items on this the License Plate.
- Check per order, if every License Plate, found in the in the Detailed Warehouse Entries for this order, is in the status LOADED
- IF all statuses of all license plates per order are LOADED THEN the order Logistic Status is changed to LOADED.
- This all is applicable if the automatic logistic status update is setup by definition of the action code in the logistic statuses.

## PBI 245890 - Enable moving routes by external system

### What



It is now possible to make a customization that enables to move routes by an external system.

## **PBI 245742 - Process No Backorder should update the logistic status of the sales order**

### **What**

When a logistic status for sales orders is created with action SHIPPED, an order gets that status when all lines are completely shipped. In a normal flow you would process backorders prior to the shipment, but when it is done in the opposite sequence the order status was not updated, also not when the process backorder function was executed and no line would have an outstanding quantity anymore. That has been resolved, this function will update the logistic status when no lines have an outstanding quantity anymore.

## **PBI 245560 Reschedule License Plates - Transport validations on Shipment Bin**

### **What**

Reschedule LicensePlates-Transport validations on Shipment Bin

### **Why**

When LPN's are Rescheduled and in the warehouse the action Register Rescheduled Delivery is used, we have no way of knowing the real place where the license plate is located in the warehouse. To get the correct information to the scanner in the module Route load List, we changed the flow in Drink-IT Logistics. When performing the action Register Rescheduled Delivery on the warehouse shipment, the Confirmed Transport Validation Type and the Confirmed Transport Validation Code on the License Plate are changed to "Shipment bin" and the value from the Reschedule Bin Code on the location. And the Route Plannings No. is changed to the new Route Plannings No. to enable the License Plates to be selected in the Route Plannings Load List.

### **How**

The issue is fixed

## **PBI 243871 - Sales Header Error when changing the LP Status by AOW**

### **What**

SalesHeader Error when changing the LP Status by AOW

### **Why**



When registering the loading of a License Plate in the Route LoadList,an incorrect error was displayed,triggered from Logistics

#### How

The issue is fixed.

## PBI 243264 - Block delete Route if route is used in master data and/or Documents

#### What

It should not be possible to delete a route when that route is used in mastred data or transaction documents.

#### Why

When a route is already assigned to a customer, a sales order or any other master data or transaction, you will get blocking error messages when you delete that route. You will now be prevented for such errors

## PBI 244158 - Shipment dates - error when creating in foreign language

#### What

The function to create customer shipment dates could result in an error when running it in another user client language than ENU. That has been resolved.

## PBI 243209 - Suspend Status Check on changing route in routeplanning worksheet on multiple order route

#### What

When the route is a multiple order route the sales order is updated with blank but without surpressing the statuscheck of the salesorder. This is fixed.

- when an order is changed from a default route to a route and the route is multiple order, the shipment method, shipping agent code and shipping agent service is set to blank on the sales order. The route planning worksheet or Warehouse shipment if applicable is leading for these fields. Sales order will be updated with the values during the posting of the sales shipment document.
- when a route is changed from a route to a route and the route is multiple order, the shipment method, shipping agent code and shipping agent service is set to blank on the sales order without opening and releasing the sales order again.



## Why

As a Logistic employee I want to be able to move a sales order from a route to another route in the route planning worksheet.



# 20.202303.0.0

Release Note • 12/4/2023 • 20 min read

## Features

| PBI No.                | Description                                                                                                                                                              |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">237405</a> | Payment journals filtered by customer                                                                                                                                    |
| <a href="#">220816</a> | Automatic shipment date based on cut-off no. of days (LOG)                                                                                                               |
| <a href="#">230133</a> | Comments on <i>Route Planning</i> (04)                                                                                                                                   |
| <a href="#">236646</a> | Route planning worksheet - for single order route, function to create warehouse shipment/receipt must copy value for <i>Shipping Agent</i> a.o. from the source document |
| <a href="#">237006</a> | Logistics Status : Loading in Progress by field on route planning worksheet                                                                                              |
| <a href="#">239809</a> | Warehouse Shipment Book                                                                                                                                                  |
| <a href="#">239746</a> | Logistic Status : loaded with the automatic function can only be when all pallets have the status loaded                                                                 |
| <a href="#">242487</a> | Route planning warning : add <i>waiting for approval</i> in the error message                                                                                            |
| <a href="#">239750</a> | Logistic status : Allow by the logistic status to add outbound item lines to orders                                                                                      |

## Resolved issues

| PBI No.                | Description                                                                                                                                |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">241043</a> | Sales comment error message on sales order when linked warehouse shipment is posted                                                        |
| <a href="#">239728</a> | Route planning worksheet - When an order is moved to another route the warehouse request is not updated well (multiple-single order route) |

### PBI 237405 Payment journals filtered by customer

What



When I open one of the payment journals from the route planning request, I only want to see the lines added from the customer linked to the route planning request I pushed the action (create Cash Payment journal, Card payment journal or Other payment Journal). When the journals are opened from the route planning, all created lines should be visible, no filtering on customer no. should be in place only the filtering on route planning no.

### Why

As a A/R employee I want to have as quick as possible the overview on the payments received on an order from the route planning worksheet.

## PBI 220816 - Automatic shipment date based on cut-off no. of days (LOG)

### What

Automatic shipment date based on source routes and cut-off time.

### Why

Companies require that orders are created and released with a proper shipment date, in line with

- (limited) source routes (eg customer only gets delivered on tuesdays)
- a cut-off time for the route (orders created/released too late should get the next valid shipment date)

### How

#### *Setup Routes*

1. Choose the Search icon , enter **Routes** and then choose the related link.
2. Fill fields **Cut-off no. of days** and **Cut-off Time** in case this should steer the shipment date in an order.

#### *Setup Customers*

3. Choose the Search icon , enter **Customers** and then choose the related link.
4. Select a **Customer** and open the card page.
5. Select the **Default Route** field on fastTab **Logistics**, Drill down on the Assist-Edit button of this field to open the **Source Routes** for the customer.

A record was automatically created for the default route.

- The field **Shipment Day** may have been filled when set on the route, else select a day in the week if the customer may only be delivered on that day.
- Multiple lines can be created for the same route with another shipment day (eg. customer gets delivered on Tuesdays and Fridays).



- Leave the shipment day blank when the customer can get delivered every day in the week on a route.
- The field **Cut-off No. of Days** is filled from the route when set, else you can fill it yourself (eg. for export customers where the shipment date should be 15 days after order date, set it to 15D).

### Logistics Setup

6. Choose the Search icon , enter **Logistics Setup** and then choose the related link.
7. Fill a dateformula in field **Shipment Dates Calculation**. The function on the **Customer Shipment Dates, Create Shipment Dates** will calculate shipment dates from the workdate until this end date.

### Create Shipment Dates

8. Choose the Search icon , enter **Customer Shipment Dates** and then choose the related link.
9. Click on action **Create Shipment Dates** (this action may have been triggered automatically when you closed the source routes page). Starting and Ending date are defaulted.
10. Click OK.

### Process

11. Choose the Search icon , enter **Sales Order** and then choose the related link.
12. Create a new **Sales order**, select a customer. Field **Route** is filled by default from the customer and field **Shipment date** is filled with the first allowed (before cut-off) date.
13. Drill down on the Assist-Edit button of the **Shipment Date** field to select a next for the customer possible shipment date from the customer shipment dates.
14. Or use functions **Next Shipment Date** and **Previous Shipment Date** from the action Functions > Logistics to scroll through the allowed shipment dates.
15. Still the user can select a shipment date manually. In case that has a conflict, the cut-off warning will enable you to select the next (allowed) shipment date as well.

#### Note

In the **Route Planning Worksheet**, the same functionality is available.

#### Note

When you the field **Route Limit** is enabled on the **Customer card** (fastTab **Logistics**), the fields **route** and **shipment date** are **not editable** in the sales order, and you can only select by the assist-edit button on each field and by the **Next Shipment Date** resp. **Previous Shipment Date** functions to influence the shipment date on the sales Order.



 Note

- There is an integration with Advanced Warehouse Management, where the route will trigger actions for the license plates, assigned to an order and an internal movement. In that case fill in the route also fields
- **Reschedule Action**, select the option **Reschedule** or **Cancel**.
- **Reschedule Bin Code**: (it will register an internal movement from shipment bin to this bin)

## PBI 230133 Comments On Route Planning (04)

### What

Add in the factbox pane on the Route planning Worksheet the features attachments and notes.

### Why

As a logistic manager I want to be able to attach document to the **Route planning No.** and want to be able to have an overview of these documents per Route.

## PBI 236646 Route Planning worksheet - for single order route, function to create warehouse shipment/receipt must copy value for "Shipping Agent" a.o. from the source document

### What

UI of the logistics fields in the Order documents which helps to understand the differences as a user between a multi order route enabled or disable on the route.

**Why** As a Sales employee I want to be guided by the system which fields I can influence for the logistic process depending on multi order route enabled or disabled.

1. Choose the Search icon  , enter **Route** and then choose the related link.

2. Select a route and focus on field **Multi Order Route**

3. *Multi Order Route = Enabled*

- Logistic fields are non-editable in the order document. The fields are Shipment Method Code, Shipping Agent, Shipping Service, Driver, Vehicle, Co-driver and Trailer
- Creating the warehouse document will inherit the fields from the route planning worksheet and are non-editable.



#### 4. Multi Order Route = Disabled

- Logistic fields are editable in the order document. The fields are Shipment Method Code, Shipping Agent, Shipping Service, Driver, Vehicle, Co-driver and Trailer.
- Creating the warehouse document will inherit the fields from the route planning worksheet and are editable.

## PBI 237006 Logistics Status : Loading in Progress by field on Route planning worksheet

### What

Mark a route planning no as Loading (in progress), updating the logistic status.

### Why

When trucks have arrived and loading started, it should be possible to indicate and see that in the route planning worksheet.

1. Choose the Search icon , enter **Route Planning Worksheet** and then choose the related link.
2. Select the routeplanning No. for which the truck has arrived.
3. Enable the field **Loading** on the Route planning line.
4. If the logistics statuses were defined the status of the related order(s) in the Route planning Request are updated accordingly the setup in the **Logistics Statuses**
5. Choose search icon, and search for **Logistics Statuses**
6. Select the code that corresponds to the status you want to adapt in the logistical status of the orders
7. Select on this status the action code **Loading in progress**, if the status on the order should be updated automatically when the field **Loading** is enabled in the Route Planning Worksheet.

### Note

By adding a new logistical status make sure the next and previous steps are updated for the new status and for the existing statuses in the type of document. No update can give unexpected flow in the statuses of the document type.

## PBI 239809 Warehouse Shipment Book

### What

An overview of the warehouse shipment lines so the warehouse manager can have the overview on the shipment lines which still needs to be handled for a shipment date or Route.



## Why

As a warehouse manager I want an overview of all warehouse shipment lines created so I can follow the status on picks created, picks registered and shipments posted.

## How

1. Choose the Search icon , enter **Warehouse Shipment Book** and then choose the related link.
2. Use the **Advanced Filters** to become a quick overview of the status of the warehouse shipments.

### Note

Own views can be created by the **save view as** functionality

### Note

The **Warehouse Shipment Book** can be opened direct from the route planning worksheet, filtered on the **Route Planning No.**

## PBI 239746 Logistic Status : loaded with the automatic function can only be when all pallets have the status loaded

## What

If a truck is loaded you can execute a function to set the status of the license plates to 'Loaded' which also triggers the logistic status of the Sales order to 'Loaded'. This can be executed manually or by scanning device.

From the moment one pallet is scanned or if the action is executed is the status not yet updated to 'Loaded', the action of the logistic status is only executed when all pallets for that order or for that route have been set to status 'Loaded'.

## Why

As a logistic manager I want to follow the status of the sales orders in the route planning worksheet.

## PBI 242487 Route planning warning : add 'waiting for approval' in the error message

## What



Open error already appears in the route planning worksheet but if the order is in waiting for approval it gives me as a logistic employee not the full information.

### Why

As a logistic employee I want to get a message in the route planning worksheet if an order is open or waiting for approval.

\*When an order is in **waiting for approval** after the order was reopened, changed and send for approval (If applicable by the workflow setup), the error in the Route planning worksheet will contain the **status is waiting for approval**, if the order has the status open the error remains **status is open**.

- Move an order with an error or warning to another Route Planning No. the error or warning will be moved at the same time.
- By checking the field **Complete** on the Route planning worksheet, a warning will appear if there are still unfinished lines in the order(s). The complete field stays enabled, by unclicking the field **Complete** the warning disappears, the warning will remain to appear as long there are unfinished work for the order(s) and enabling the **Complete** field.

## PBI 239750 - Logistic status : Allow by the logistic status to add outbound item lines to orders

### What

If an order is e.g. in warehouse shipment, pick, loaded or to be invoiced, I don't want that employees can change orders. By setup, in the logistical statuses, I want to be able to block changes on a sales order for an item line when this is not longer allowed in the process.

### Why

As a warehouse manager, I want to control the order administration if the sales orders can be updated depending on the logistic status.

### How

1. Choose the Search icon  , enter **Logistics Statuses** and then choose the related link.
2. Select the code that corresponds to the status you want to update in the logistical status of the order.
3. Enable on this status the field **Blocked Item Sales Line**. As this is enabled it is no longer possible to add item lines on a sales order which has this logistical status.



## **PBI 241043 - Sales comment error message on sales order when linked warehouse shipment is posted**

### **What**

Sales comment error message on sales order when there is a linked warehouse shipment or the shipment is posted.

### **Why**

When you, as a Sales Manager, want to add a comment on a Sales Order that is already shipped, or where the warehouse shipment is created, you get an error message. Only in case the comment is different from Show & Notify and when there are no other comments. This issue is fixed.

## **PBI 239728 - Route Planning Worksheet - When an order is moved to another route the warehouse request is not updated well (multiple-single order route)**

### **What**

When an order was moved from a multiple order route to a single order route, the warehouse shipment created for that order would show as multiple order route, meaning fields for drivers, trucks and shipping agent would show uneditable. That has been resolved.



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## Features

| PBI No.                | Description                                                                 |
|------------------------|-----------------------------------------------------------------------------|
| <a href="#">233800</a> | Mark a route planning no. as return completed, updating the logistic status |
| <a href="#">233673</a> | Replan <i>Undelivered Customer Shipments</i> (LOG)                          |
| <a href="#">232607</a> | LOG blanket order enhancement - logistic statuses                           |
| <a href="#">222912</a> | Document printing from route planning worksheet - Load List                 |
| <a href="#">227663</a> | Mark a route planning no as completed, updating the logistic status         |
| <a href="#">231118</a> | Route Planning request - info on address fields missing                     |

## Resolved issues

| PBI No.                | Description                                                                                                                                                           |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">236453</a> | Route should fill Location code in blanket order header                                                                                                               |
| <a href="#">236757</a> | Route fields not updated on <b>Customer</b> and <b>Vendor</b> Card when changed in the route that is connected to the customer or vendor                              |
| <a href="#">235954</a> | Calculated fields in <i>Route Planning Worksheet</i> should be recalculated on release of the document                                                                |
| <a href="#">236004</a> | Logistic fact box should be based on quantity instead of outstanding quantity                                                                                         |
| <a href="#">235429</a> | License Plate information in Route planning should only show Place LP Nos, not the Take LP No. (after posting the warehouse pick/shipment)                            |
| <a href="#">233954</a> | <b>Customer Shipment Dates</b> page should be editable and <i>Recreate Entries</i> (Create Shipment Dates) should delete all existing entries within the filter (LOG) |
| <a href="#">231754</a> | Posted documents do not show in the route planning worksheet                                                                                                          |



## PBI 233800 Mark a route planning no as Return completed, updating the logistic status

### What

Mark a route planning no as Return completed, updating the logistic status.

### Why

When products are sold in returnable packaging items (empty good) drivers will come back with collected empty goods that need to be registered to credit customers for deposit and receive the goods, so they are available in production.

It is required to indicate that all returns were registered on a route planning no.

**How** 1. Choose the Search icon , enter **Logistic Statuses** and then choose the related link. 2. Create a Status code for type = **Sales order** and **Sales Return order**, that reflects that returns were registered on the order/return order. 3. Select the **Action Code** = **Return Completed** and complete the **allowed next steps** and **allowed previous steps** with other logistic statuses for these two document types. 4. Choose the Search icon , enter **Route Planning Worksheet** and then choose the related link. 5. Select a route planning line that was shipped. 6. In the **Route request Lines** part, click on **Return Entry** and register the collected returned goods per order. 7. When you completed that for all orders/return orders, check field **Return Completed** on the **route planning line**. 8. The logistic status of the orders and return orders will be updated.

See also: **Return Control** for checking returned items in totals.

## PBI 233673 - Replan Undelivered Customer Shipments (LOG)

### What

Routes with a logistic status for canceled orders and for orders to be rescheduled.

### Why

Orders can be rescheduled or canceled. Companies may setup routes for that, move orders to the route and have a clear overview on what orders. It is wanted that the logistic status is updated conform.

### How

1. Choose the Search icon , enter **Logistic Statuses** and then choose the related link.
2. Create logistic statuses for cancel resp. reschedule/replan for sales orders and purchase orders.



3. Leave the **Action Code** blank.
4. Complete the **Allowed next steps** and **Allowed previous steps**.
5. Choose the Search icon , enter **Routes** and then choose the related link.
6. Create routes (per location) for canceled orders and for orders to be rescheduled and select the **Sales Logistic Status** you created for that.
7. Select in a released or open **sales order** the route for cancel or replan, the logistic status will inherit the one from the route.
8. Choose the Search icon , enter **Route Planning Worksheet** and and move an order there to the cancel or replan route. The same will happen.
9. Create routes (per location) for canceled orders and for orders to be rescheduled and select the **Purchase Logistic Status** you created for that.
10. Select in a released or open **purchase order** the route for cancel or replan, the logistic status will inherit the one from the route.
11. Choose the Search icon , enter **Route Planning Worksheet** and move an order there to the cancel or replan route. The same will happen.

#### Note

- There is an integration with Advanced Warehouse Management, where the route will trigger actions for the license plates, assigned to an order and an internal movement. In that case fill in the route also fields
- **Reschedule Action**, select the option **Reschedule** or **Cancel**.
- **Reschedule Bin Code**: (it will register an internal movement from shipment bin to this bin)

## PBI 232607 - LOG Blanket order enhancement - logistic statuses

### What

Logistic Status for blanket orders.

### Why

Just like orders, blanket orders also can have a status by which users can follow up.

### How

1. Choose the Search icon , enter **Logistic Statuses** and then choose the related link.
2. Create statuses for **Type = Sales blanket order**. Make sure to create one blank status (Code is blank). Complete the allowed next steps and allowed previous steps.



3. Create statuses for **Type = Purchase blanket order**. Make sure to create one blank status (Code is blank). Complete the allowed next steps and allowed previous steps.
4. Create a new **sales blanket order**. View the **Logistic status** on FastTab **Logistics**.
5. Click on **Update to Next Logistic Status** action to update the status to a next allowed status, and click on **Update to Previous Logistic Status** action to update the status to a previous allowed status. You can enable the logistic status field in the sales blanket order list page.
6. Create a new **purchase blanket order**. View the **Logistic status** on FastTab **Logistics**.
7. Click on **Update to Next Logistic Status** action to update the status to a next allowed status, and click on **Update to Previous Logistic Status** action to update the status to a previous allowed status. You can enable the logistic status field in the purchase blanket order list page.

## PBI 222912 - Document printing from Route planning worksheet - Load List

### What

Load list report in Route Planning Worksheet.

### Why

When drivers go out, they are required by authorities to have a load list with them showing the total content in their vehicle, per item.

### How

1. Choose the Search icon , enter **Logistic Setup** and then choose the related link.
2. On **General** fastTab, select the report ID in field **Report ID Load List**.
3. Open the route Planning Worksheet and select a route planning line with sales orders assigned. Click on **Print Load List** action.

## PBI 227663 - Mark a route planning no as completed, updating the logistic status

### What

Mark a route planning no Completed, updating the logistic status.

### Why

It is required to indicate that all shipments and returns were registered and posted on a route planning no., so sales invoices can be created and posted for the orders.



## How

1. Choose the Search icon , enter **Logistic Statuses** and then choose the related link.
2. Create a Status code for type = **Sales order** and **Sales Return order**, that reflects that the route is completed.
3. Select the **Action Code = Route Completed** and complete the **allowed next steps** and **allowed previous steps** with other logistic statuses for these two document types.
4. Choose the Search icon , enter **Route Planning Worksheet** and then choose the related link.
5. Select a **Route planning line** that was completely shipped (and return received) and check field **Completed**. The **Logistic status** of the orders and return orders will be updated. Would an order still have a line with an **outstanding quantity**, a **warning** is shown in the message column.

## PBI 231118 - Route Planning request - info on address fields missing

### What

Ship/Receipt-to address fields in Route planning worksheet.

### Why

The route request lines showed information on the Ship/Receipt-to Name and -City. Route planners need all address information.

### How

1. Choose the Search icon , enter **Sales orders** and then choose the related link.
2. Create a new order, select route and shipment date and release the order.
3. Choose the Search icon , enter **Route Planning Worksheet** and then choose the related link.
4. Set a filter on the shipment date and find your order.
5. Personalize the **Route Request Lines**: enable the additional fields: Ship/receipt-to Name2, -Address, -Address2, -Post Code and -Country-Region Code.
6. Choose the Search icon , enter **Purchase orders** and then choose the related link.
7. Create a new order, select route and expected receipt date and release the order.
8. Choose the Search icon , enter **Route Planning Worksheet** and then choose the related link.
9. Set a filter on the shipment date and find your order. View all name and address fields.



## **PBI 236453 - Route should fill Location code in blanket order header**

### **What**

Changing the route in a blanket order did not update the location. That has been resolved.

## **PBI 236757 - Route fields not updated on Customer and Vendor Card when changed in the Route that is connected to the Customer or Vendor**

### **What**

When changing the shipping location, receipt location, shipping agent, -service code or shipment method for a route, it did not update customers, vendors and address codes with that default route. Same for the Transfer routes (shipping agent/service only). That has been resolved. The master data cards will now contain the updated values (uneditable).

## **PBI 235954 - Calculated fields in Route Planning Worksheet should be recalculated on release of the document**

### **What**

When an order was reopened and quantities changed, The logistic fact box and the route planning request line was not updated when releasing again. That has been resolved.

## **PBI 236004 - Logistic fact box should be based on quantity instead of outstanding quantity**

### **What**

Volume, Weight and pallet information in orders and return orders would show based on outstanding quantities. That has been corrected to quantities. Now the logistic fact box in the orders and the route planning worksheet will show the total numbers, whether shipped or not.



## PBI 235429 - License Plate information in Route planning should only show Place LP Nos, not the Take LP No. (after posting the warehouse pick/shipment)

### What

License Plate information in Route planning should only show Place LP Nos, not the Take LP No. (after posting the warehouse pick/shipment).

### Why

When a destination license plate number for a mixed pallet (by NORRIQ Advanced Online Warehouse Management) was assigned to a warehouse shipment, the Route Planning Worksheet (No. of Pallets field) also showed the license plate of the pallet where the goods were taken from. This is now not the case anymore, since this info is irrelevant.

## PBI 233954 - Customer Shipment Dates page should be editable and Recreate Entries (Create Shipment Dates) should delete all existing entries within the filter (LOG)

### What

When running the **Create Shipment Dates** function with option **Recreate Entries** checked, it should delete existing **Customer Shipment Dates** lines (within the filters set). In addition, it was not possible to add, modify or delete entries manually. Both have been resolved.

## PBI 231754 - Posted Documents do not show in the route planning worksheet

### What

The Find Entries action did not show posted sales invoices and -credit memo's that were linked to a route planning no. (invoices and credit memo's posted from the order/return order contain the route planning no.). That has been resolved.



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## Features

| PBI No.                | Description                                                                    |
|------------------------|--------------------------------------------------------------------------------|
| <a href="#">223864</a> | LOG - Drop Shipment does not update Logistic Status in other document (SO/PO)  |
| <a href="#">231115</a> | Return control Status issues                                                   |
| <a href="#">232005</a> | Include the Cut-Off Days and Cut-Off Time in the <i>Customer Shipment Days</i> |

## Resolved issues

| PBI No.                | Description                                                                                                 |
|------------------------|-------------------------------------------------------------------------------------------------------------|
| <a href="#">228983</a> | Move Route PLanning (header) should update shipment and posting date in <b>Warehouse</b> header (and lines) |

## PBI 223864 - LOG - Drop Shipment does not update Logistic Status in other document (SO/PO)

### What

Drop Shipment does not update Logistic Status in other document (SO/PO)

### Why

In a drop shipment, the shipment of items from one of you vendors is directly to one of you customers. Your sales order is linked to a purchase order.

After the vendor ships the items, you can post the sales order as shipped. You can also post the purchase order, but only with the Receive option until the sales order has been invoiced. When you post the shipment of the sales order, business central will also post the receipt of the purchase order. When you post the receipt of the purchase order, the sales order will automatically be posted.

In Drink IT Logistics, for both scenario's, you want the logistical status to be updated in both documents:



- When the receipt of the purchase order triggers a change in the Logistical Status, the same status change should be executed on the linked sales order.
- When the shipment of the sales order triggers a change in the Logistical Status, the same status change should be executed on the linked purchase order.

See also: <https://learn.microsoft.com/en-us/dynamics365/business-central/sales-how-drop-shipment>

## PBI 231115 - Return control Status issues

### What

On the Route planning worksheet the status of the return Control follows the status of the route Return Control and the status of Cash control status follows the route payments

### Why

As a Finance manager, I want to follow the status of the return Control on the Route planning worksheet to complete the route.

If the status in the return control is '**Open**' and lines are created in the return control the status is set automatically on the route planning as '**Pending**' similar with '**Concessed**' or '**Finished**'

If a route payment Line is created the status of Cash Control status is set to '**Pending**'. The status '**Open**' is the starting point and every route will contain this value. Only finished can become the status if this is manually set. Adding a Route payment line automatically the status is set again to '**Pending**'

## PBI 232005 - Include the Cut-Off Days and Cut-Off Time in the Customer Shipment Days

### What

Include the Cut-Off Days and Cut-Off Time in the Customer Shipment Days

### Why

When you customers order in your webshop, the shipment date for that order should take the cut-of time for that date in account, so they are not able to choose a date that is not possible for delivery anymore.

### How

1. Choose the Search icon  , enter **Customers** and then choose the related link.
2. Open the customer card you want to calculate shipment days for.



3. On the **Customer Card** page, choose the Customer Shipment Dates action.
4. On the **Customer Shipment Dates** page, choose the **Create Shipment Dates** action. The action will fill the Cut-Off and Closing Time fields according to the setup of the routes of the customer.

## PBI 222983 - Move Route Planning (header) should update Shipment and posting date in Warehouse header (and lines)

### What

When you would move a route planning line to another date by the Move Route Planning function, related warehouse shipments and -receipts were not updated. That has been resolved, both headers and the due date in the warehouse lines are conform the new shipment/receipt date now.



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Release Note • 12/4/2023 • 14 min read

## Features

| PBI No.                | Description                                                                                     |
|------------------------|-------------------------------------------------------------------------------------------------|
| <a href="#">220917</a> | Docks - License Plate Overview                                                                  |
| <a href="#">222273</a> | Create periodic invoices/credit memos from the route planning worksheet                         |
| <a href="#">222883</a> | AOWM-LOG - Pick - Enable docks to be used in warehouse template and scan dock at end of picking |
| <a href="#">224886</a> | Add route planning no. to the license plate list during posting of shipment                     |
| <a href="#">225343</a> | Customer shipment dates List                                                                    |
| <a href="#">225384</a> | Update <i>Customer Shipment Dates</i> from source route and <b>Call Schedule</b> page           |

## Resolved issues

| PBI No.                | Description                                                                    |
|------------------------|--------------------------------------------------------------------------------|
| <a href="#">227260</a> | Source routes for customer or vendor should be available for all address codes |
| <a href="#">227468</a> | Error in functions Previous/Next Source route in purchase order                |

## PBI 220219 - Docks - License Plate Overview

### What

Docks - License Plate Overview

### Why

As a warehouse employee, I want to have an overview of all license plates on a dock, so I can check license plates and the physical place on the shipping zone.



 **Note**

All Docks need to have an unique Code.

## How

**Business Central Setup Open Logistics Statuses** Enable the Boolean **Show on Dock List**, on the statuses of the License Plates you want to be able to see in the Dock list.

## Flow

### Open Docks

#### Check No. of License Plates

Click on the number to get the License Plate List

## PBI 222273 - Create Periodic Invoices/Credit memos from the route planning worksheet

## What

FND functions **Create periodic Invoices** and **Create Periodic Credit Memos** have been enhanced when LOG is installed, with

- filter on **logistic status**
- activate functions from the **route planning worksheet**

## Why

Where routes are delivered and returns registered on the order and then one clean invoice is required with the deliveries and returns on it. Some routes may have been completed (returns registered and posted) and others not. It should be possible to exclude orders (routes) that are not complete yet. Logistics department staff indicates that by the Logistic Status field on the sales order. (eg. 'Ready for invoicing').

In some cases the driver hands over the invoice with the delivery note to the customer (cash payments or else). An invoice with the delivery of today and possibly the returns of last week. It should be possible to create invoices route by route.

## How

Run the **Create periodic Invoices** batch job and fill field **Logistic Status Filter** with the status that expresses that the order is completed (deliveries and return receipts posted; 'ready for invoicing')



Open the **Route Planning Worksheet**, select the **route planning line** you want to invoice. Click on the 'Posting action' **Create periodic Invoices** resp. **Create Periodic Credit memos**. Automatically a filter is set on those customers for which an order or return order is assigned to the route planning no. Set additional filters as you want (Invoice Period; Start/end date). Select **Invoice period** = **blank** if you want to include **open shipments of previous orders** ('returned empties of last week'), assuming customers/orders it concerns ('cash payment') were setup with that invoice period. Make sure the **Logistic Status** filter does not exclude them (better leave it blank for this case).

## PBI 222883 - AOWM-LOG - Pick - Enable docks to be used in Picking Template and Scan Dock at end of Picking

### What

AOWM Pick - Enable docks to be used in Picking Template and Scan Dock at end of Picking

### Why

As a warehouse Manager, I want my warehouse employees to be able to confirm the shipment bin or loading dock in the pick, so I am sure to find the picked items at the correct place.

The scanner will mandatory request the user to scan the Shipment bin, Dock, Vehicle or Shipping Agent to confirm the place to load or ship from.

### Prerequisites

#### *The location*

- *is Bin mandatory*
- *Require Shipment*
- *Require Pick*

**License Plates are mandatory** to use for all picks and shipments from this location.

### **Picking and Loading Confirmation: Total Process Flow**

*In a warehouse, picks can be placed on different destinations: shipment bins, docks or immediately in a truck.*

#### **Full Picks**

*Depending on setup per picking template, the employee needs to mandatory scan the destination (Shipment bin, Dock, Vehicle or Shipping Agent) after each registration of picking items.*

*The scanner will not allow the employee to pick another item or complete, neither close, the pick on the scanner, until the destination is scanned.*

#### **Mix Picks**



*Depending on setup per picking template, the employee needs to mandatory scan the destination (Shipment bin, Dock, Vehicle or Shipping Agent) when putting a mixed pallet on the destination.*

*The scanner will not allow the employee to complete, neither close, the pick on the scanner, until the destination for each mixed pallet linked to this pick is scanned.*

### **Shipment Loading**

*When not immediately picked in to a truck, picked LPN's can be on a dock or shipment bin to be loaded.*

*The scanner will inform the employee, in a loading list, which LPN's, where to find to load in to the truck.*

*Depending on setup per Shipping Agent, the employee needs to mandatory scan the destination (Truck or Agent) when putting a pallet on the destination.*

*The scanner will not allow the employee to complete, neither close, the shipment loading document on the scanner, until the destination for each pallet linked to this shipment is scanned.*

### **Overview**

*At any moment, it needs to be possible to check upon the the LPN's per Shipment bin, Dock, Shipping Agent and/or Truck.*

### **How**

#### **In Business Central**

*For the OWM 6 App on the Android Scanner, no setup is needed to display the shipment bin or dock in the Shipment Load List, it will be shown standardly, whenever Picking Confirmation is setup.*

#### **Note**

Below, the setup for Picking and Loading Confirmation: Total Process Flow is added for your information.

### **How**

#### ***The flow through Business Central***

#### **In the Pick**

- **Register Pick (Scan LPN or bin)**
- When registering a pick in the OWM 6 App on the Android scanner, the status of the license plate is changed to the Default License Plate Status in the picking template line, if empty, to the Status Picked License Plate on the Adv. Warehouse Setup.



- The OWM 6 App, checks in the picking template line if a Transport validation Type is entered. If so, this transport Validation Code is added to the License Plate.
  - In a Full LPN Pick, this means you are not able to pick the next LPN until you entered, or scanned, the demanded place (bin, dock, vehicle or Shipping Agent)
  - In a Mix LPN Pick, this means you are not able exit the pick until you entered, or scanned, the demanded place (bin, dock, vehicle or Shipping Agent)
- **Confirm Place (Scan Shipment bin, Dock, Vehicle or Shipping Agent)** After confirming the correct place (bin, dock, vehicle or Shipping Agent) in the OWM6 App on the scanner:
  - The status of the License Plate is, depending to the transport validation tables, changed to another status.
  - The Transport Validation Type and Transport Validation Code on the License Plate are moved to the Confirmed Transport Validation Type and Confirmed Transport Validation Code.
  - The Transport Validation Type, on the license plate, is changed to the Next Transport Validation from the Logistics Statuses

### In the Shipment Load List

- **Register Loading (Scan LPN or Long press on a line)**

When registering an LPN to be loaded in the OWM 6 App on the Android scanner, the status of the license plate is changed to the Status Loading License Plate on the Adv. Warehouse Setup.
- **Confirm Loaded Place (Scan Vehicle or Shipping Agent)**

When confirming the correct Loaded place (Vehicle or Shipping Agent) in the OWM6 App on the scanner:

  - The status of the License Plate is changed to the Status Loaded License Plate on the Adv. Warehouse Setup.
  - The Transport Validation Type and Transport Validation Code on the License Plate are moved to the Confirmed Transport Validation Type and Confirmed Transport Validation Code.

#### Note

- *To use Dock or Vehicle, Drink-IT Logistics needs to be installed.*
- *It is imperative no Codes of Shipping Bins, Dock, Vehicles, nor Shipping Agent may be equal to each other.*

### Setup in Business Central

When using this flow, some License statuses are imperative to been setup. Open **Logistic Statuses**

Add a new Status, for each status needed within the total flow of your warehouse:

- Type: **License Plate**
- Code: *Code*
- Action Code: *Empty*
- Description: *Description*



- Display Order: *Integer*
- Allowed Back Steps: *Add as many as desired*
- Allowed Next Steps: *Add as many as desired*
- Allowed on Post Shipment: Enabled, when you allow shipment to be posted when the license plate has this status.
- Allowed on Post Invoice: *Disabled (no function for License Plates)*
- Exclude from Pick: Enabled, when License Plates with this status are not allowed to be taken into the Create Pick Calculation.

### Note

*When you want a license plate with a certain status to be protected from being picked, you need to use Outbound blocks for this status. Show on Load List: Enabled, when you want to show License Plates with this status in the Shipment Load List in the OWM 6 App on the Android scanner.*

- Show on Dock List: Enabled, when you want to show License Plates with this status in the field Number of License Plates in the Dock list
- Inbound Blocks: *Free to add*
- Outbound Blocks: *Free to add*
- Handle License Plate Transport Validation: Enabled, when after confirming the shipping bin, dock, vehicle and or shipping agent
- Next Transport Validation: Select the Next Transport Validation, if wanted.

### Note

*You are not allowed to use the same License Plate status in 2 different steps within the flow.*

## Open Adv. Warehouse Setup

Select a **different** logistic License Plate status for each License Plate status in the setup.

When using Shipment bin, the shipment bins need to be identified.

- Open **Locations**
- **Select** the location
- Action **Bins**
- Enable the boolean **Is Shipping Bin** for all bins, used to ship from and to be used to confirm In the OWM 6 App on the scanner

When using Shipping Agent or Vehicle, this needs to be identified.



## Open Shipping Agents

Add **Transport Validation** Type to a shipping agent.

- Open **Locations**
- **Select** the location
- Action **Configure OWM**
  - Action **Modules on Scanner**
  - Select **Warehouse Pick**
  - Action **Actions**
  - Action **Validations**
  - Add Validation:
    - Step: the step **before** Resolve bincode from identifier
    - Resolver: None
    - Validator: **Validate the transport code**
    - Active: **Yes**

## Open Transport Validation Tables

To add a line on **Shipment Bin Validation**:

- Code: Code
- Table ID: **7354**
- Field No. to Validate: **2**, to scan the **Shipping Bin Code**
- View
  - Order: ASCENDING
  - Filter Line 1
    - Field Name: **Location Code**
    - Type: **VAR**
    - Value: **SILocationCode**
  - Filter Line 2 \* Field Name: **AOW Is Shipping Bin NIQ** \* Type: **CONST** \* Value: **Yes**
- Status: **Code of the new status**

To add a line on **Dock Validation**:

- Code: Code
- Table ID: **2014419**



- Field No. to Validate: 2, to scan the **Dock Code**
- View
  - Order: ASCENDING
  - Filter Line 1
    - Field Name: **Location Code**
    - Type: **VAR**
    - Value: **SILocationCode**
- Status: **Code of the new status**

**To add a line on Vehicle Validation:**

- Code: Code
- Table ID: **2014414**
- Field No. to Validate: 1, to scan the **Vehicle Code**
- View
  - Order: ASCENDING
- Status: **Code of the new status**

**To add a line on Shipping Agent Validation:**

- Code: Code
- Table ID: **291**
- Field No. to Validate: 1, to scan the **Shipping Agent Code**
- View
  - Order: ASCENDING
- Status: **Code of the new status**

**Open Picking Templates**

In the Picking Template to use, select the desired **Transport Validation Type**

- Shipment bin
- Dock
- Vehicle
- Shipping Agent

***OWM 6 App on Android***



- Open the **Module Picks**.
- Open a **Pick**
- Register a **pick**

Depending on the picking template of the pick, after registering a pick, an instruction will be displayed to remind you to scan the needed validation code.

In case of a **FULL LPN** pick, you need to scan the validation code after picking an LPN.

In case of a **MIX LPN** pick, you need to scan the validation code before leaving the pick document.

You are blocked in the pick until you scanned the correct validation code.

Open the Module **Shipment Load List**.

Open a **Shipment Load List**

In the lines, the Shipping bin or Dock is displayed.

Depending on the Next Transport Validation of the current License Plate Status, after selecting a Shipment Load List Line by long press or LPN scan, an instruction will be displayed to remind you to scan the needed validation code.

You need to scan the validation code after loading an LPN.

You are blocked in the pick until you scanned the correct validation code.

## **PBI 224886 - Add route planning no. to the license plate list during posting of shipment**

## **PBI 225434 - Customer Shipment Dates List**

### **What**

Customer Shipment Dates List

### **Why**

When your customers order goods in phone calls with our tele-sales department, or in our web shop, you want to give your customers the opportunity to choose a shipment date for their orders, so you can give them the best service.

### **How**



1. Choose the Search icon , enter **Customer Shipment Dates**, and then choose the related link.
2. On the **Customer Shipment Dates** page, choose the Create Shipment Dates action.
3. On the **Create Shipment Dates** page, fill in fields as necessary. Hover over a field to read a short description.
4. Choose the **OK** button to create lines in the table.
5. Alternatively, you can also open the customer shipment dates page from the customer card. The system will set the customer number as default filter and will create dates for that customer only.

#### Note

The create shipment dates batch job uses the shipment day from source routes and call schedule lines to create entries.

## PBI 225384 - Update Customer Shipment Dates from Source route and Call Schedule page

### What

A feature from LOG enabled in ASM as well.

### Why

Customers may be restricted what days they can get delivered, a customer may perhaps only be delivered on Tuesdays. It is wanted to provide information on possible shipment dates for a customer or ship-to address.

### How

#### LOG

Open the **Customer card** and select action **Source Routes**. Create, modify or delete source routes for the customer or ship-to Address. Click on the action **Create Shipment Dates**, it automatically sets a filter on the customer.

#### ASM

Open the **Customer card** and select action **Call Schedule**. Create, modify or delete a call schedule defining calling day, shipment day. Click on the action **Create Shipment Dates**, it automatically sets a filter on the customer.

Search for **Customer Shipment Dates** in general or from a customer card and view the possible shipment dates per customer and ship-to address. Customer shipment dates are only created for **routes** that have a **shipment day** and for **call schedules** that have **no route**.



## **PBI 227260 - Dock Shipment/Receipt Bin should be updated in warehouse shipment/receipt header when changed manually, or from Route Planning Worksheet**

### **What**

Source routes for customer or vendor should be available for all address codes

### **Why**

Source routes can be created per customer, vendor and per Address Code. In an order that has an address code (Ship-to Address resp. Order Address) source routes for both the address code as general source routes (address code blank, for customer/vendor) should be available to select. That was not the case and has been resolved.

## **PBI 227468 - Error in functions Previous/Next Source route in Purchase order**

### **What**

Functions Next Source Route and Previous Source Route gave an error in the purchase order and return order. That has been resolved.



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Release Note • 1/10/2024 • 14 min read

## Features

| PBI No.                | Description                                                                                         |
|------------------------|-----------------------------------------------------------------------------------------------------|
| <a href="#">205717</a> | Return Registration from route planning worksheet.                                                  |
| <a href="#">205718</a> | Document printing from route planning worksheet.                                                    |
| <a href="#">205719</a> | Document posting (sales/purchase) from route planning worksheet.                                    |
| <a href="#">208958</a> | Process statuses warehouse & logistics - Purchase order and Return order.                           |
| <a href="#">208994</a> | Process statuses warehouse & logistics - extend statuses and actions for purchase and sales return. |
| <a href="#">217178</a> | Co-Driver and trailer in route and route planning worksheet.                                        |
| <a href="#">220160</a> | Logistic employee should exist when opening the route planning worksheet.                           |

## Resolved issues

| PBI No.                | Description                                                                                                                               |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">215035</a> | Dock Shipment/Receipt bin should be updated in warehouse shipment/receipt header when changed manually, or from route planning worksheet. |
| <a href="#">221357</a> | Qty Pallet and Qty Transport UOM updated with the wrong sign.                                                                             |
| <a href="#">221497</a> | FIX - LOG - Status Completely Picked is given to early - shipment only partially picked in reality.                                       |
| <a href="#">221642</a> | Route Planning - move transfer orders does not work.                                                                                      |
| <a href="#">221900</a> | Delivery type and delivery time code not ok in route planning worksheet.                                                                  |
| <a href="#">222615</a> | Find entries error when route planning contains posted order and linked return order.                                                     |

## PBI 205717 - Return Registration from Route planning worksheet

What



Return entry from Route planning request line.

## Why

Logistics is planned and managed from the **route planning** worksheet. Registering **returned items** (empties) is part of the logistics tasks, therefor it has been enabled directly from the route request lines.

## How

Open the **Route planning worksheet** and select the route planning no. for which returns should be added to the orders. Select an order or return order in the **Route Request lines** and click on the **Return Entry** action (works for **sales-** and **purchase orders** and **return orders**). Register the returned quantities, close the page and confirm to apply. When you open the source document you can see that the lines were added to the document (with reversed sign in case of an order). In case the sales- or purchase order was checked with **Return Entry to Return order** (default from bill-to customer resp. Pay-to vendor) a linked return order is created automatically and the returned items were added to that.

## PBI 205718 - Document printing from Route planning worksheet

### What

Document printing from Route planning worksheet.

### Why

When you plan your deliveries and receipts by routes, you already had the Route Planning Worksheet available to help you do the planning. With this release, we include the possibility to print or send the documents that are relevant, so you can increase you efficiency when you are using the worksheet.

### How

1. Select the Search icon  , enter **Route Planning Worksheet**, and then choose the related link.
2. On the **Route Planning Worksheet** page,
  - Select the **Print Sales Order Picklists** action to print or send a picklist for all orders in the selected route planning number.
  - Select the **Print Sales Order Confirmation** action to print or send sales order confirmations for all the orders in the selected route planning number.
  - Select the **Print Sales Return Order Confirmations** action to print or send sales return order confirmations for all the sales return orders in the selected route planning number.
  - Select the **Print Purchase Order Confirmations** action to print or send purchase order confirmations for all the purchase orders in the selected route planning number.



- Select the **Print Purchase Return Order Confirmations** action to print or send purchase return order confirmations for all the purchase return orders in the selected route planning number.
- Select the **Print Transfer Orders** action to print or send transfer orders for all the transfer orders in the selected route planning number.

3. On the **Route Planning** Request page,

- Select the **Print Picklist** action to print or send a picklist for the selected route planning request.
- Select the **Print Order** action to print or send a document for the selected route planning request. The document that will be send or printed depend to your [report selection](#) setup.

## PBI 205719 - Document posting (sales/purchase) from Route planning worksheet

### What

Sales- and purchase document posting and batch posting from the Route planning worksheet.

### Why

In cases where locations are not setup with warehouse activities, orders are posted one by one or in batch. The batch post functions in the worksheet help to do that efficiently, by route planning no., or order by order.

### How

Select a route planning line in the **Route Planning Worksheet** and click on **Posting** (in the header section). You can now select any of the available sales and purchase batch post functions.

- **Post Batch Sales Orders**
- **Post Batch Sales Return Orders**
- **Post Batch Purchase orders**
- **Post Batch Purchase Return Orders**

For posting a single order, click in the **Route Planning Request** section on **Posting** (available for sales and purchase documents) and select from the functions (same as in the document self).

- **Post**
- **Post & Send** (only available for sales- and purchase orders)
- **Preview Posting**



 Note

**Batch Post & Print** is supported by Business Central. Enable the **background posting** in **Sales & Receivables Setup** resp. **Purchase & Payables Setup**. The Batch post functions will then show an option **Print** in the request page that you can check.

When batch posting from the route planning worksheet, orders will be posted in the delivery sequence, which means that delivery notes and invoices will be printed in the sorting that the driver needs.

## PBI 208958 - Process statuses warehouse & logistics - Purchase order and - Return order

### What

Logistic Status in Sales Return order, Purchase order and Purchase Return order.

### Why

Orders and return orders (sales. purchase) are created, approved and released. There are no further statuses you can set. It is required that companies define their own status codes, set by the user manually.

### How

Search for **Logistic Statuses** and create Codes for type **Sales Return order**. Define per code the **allowed next status codes** and the **allowed previous status codes**. Create a new **sales return order**. Click on action **Update to Next Logistic Status** and select from the allowed codes and click **OK**. Click on action **Update to Previous Logistic Status** and select from the allowed codes and click **OK**. View the **Logistic Status** on FastTab **Logistics** In the **route planning worksheet** field and functions are also available, in the **request lines**.

Search for **Logistic Statuses** and create Codes for type **Purchase order**. Define per code the **allowed next status codes** and the **allowed previous status codes**. Create a new **purchase order**. Click on action **Update to Next Logistic Status** and select from the allowed codes and click **OK**. Click on action **Update to Previous Logistic Status** and select from the allowed codes and click **OK**. View the **Logistic Status** on FastTab **Logistics** In the **route planning worksheet** field and functions are also available, in the **request lines**.

Search for **Logistic Statuses** and create Codes for type **Purchase return order**. Define per code the **allowed next status codes** and the **allowed previous status codes**. Create a new **purchase return order**. Click on action **Update to Next Logistic Status** and select from the allowed codes and click **OK**. Click on action **Update to Previous Logistic Status** and select from the allowed codes and click **OK**. View the **Logistic Status** on FastTab **Logistics** In the **route planning worksheet** field and functions are also available, in the **request lines**.

Add column **Logistic Status** to the **Sales Return order list**, **Purchase order list** and **Purchase Return order list** pages for a overview on (return) orders and their status.



## PBI 208994 - Process statuses warehouse & logistics - extend Statuses and actions for purchase and sales return

### What

Automatic logistic statuses for sales return orders, purchase orders and purchase return orders. That was already enabled for the sales order, now it has been enabled for these documents as well.

### Why

Logistic statuses give information on the progress of an order. The user can set the status manually, but certain menu actions should set it automatically.

### How

1. Select the Search icon , enter **Logistic Statuses**, and then choose the related link.
2. On the Logistics Statuses page, choose the **New** action and add lines of the type **Sales return order**.
3. In the Action code field select from the defined automatic actions:
  - *New document, Released, Order confirmation, Route fixed, Whs. Receipt Created and Received.*
4. Add lines for type **Purchase order**. In the Action code field select from the defined automatic actions:
  - *New document, Released, Order confirmation, Route fixed, Whs. Receipt Created and Received.*
5. Add lines for type **Purchase return order**. In the Action code field select from the defined automatic actions;
  - *New document, Released, Order confirmation, Route fixed, Whs. Receipt Created and Received.*
6. Create new documents:
  - release them
  - print them
  - post them
  - include them in the route planning and set the route planning no to fixed.
  - The logistic statuses will be updated automatically.

## PBI 217178 - Co-Driver and Trailer in Route and Route planning worksheet

### What

Co-Driver and Trailer in Route and Route planning worksheet



## Why

Companies may deliver goods by trucks with trailers. Routes may require a Co-driver, eg when goods need to be unloaded manually at customer site.

## How

- In the **Routes** you can select a default **Co-driver** and **Trailer**, it is not mandatory, but when filled a route planning line inherits them.
- In the **route planning worksheet** you can select a **Co-driver** and **Trailer** (for the multiple order routes). The trailer will increase the **capacity** in **weight** and **no. of pallet places**.
- Just as the truck and driver, the co-driver and trailer can be **printed** on logistic documents and are stored in **posted documents**.

## PBI 220160 - Logistic Employee should exist when opening the Route planning worksheet

### What

Logistic Employee should exist when opening the Route planning worksheet.

### Why

When you open the Route Planning Worksheet, the system applies filters that are defined in the Logistics Employee list. Therefore, it is necessary that you first setup the employee before he is allowed to open the worksheet.

### How

1. Choose the Search icon , enter **Logistics Employees**, and then choose the related link.
2. On the **Logistics Employees List** page, select the user that needs access to the Route Planning Worksheet.

## PBI 215035 - Dock Shipment/Receipt Bin should be updated in warehouse shipment/receipt header when changed manually, or from Route Planning Worksheet

### What

When you create a warehouse shipment or receipt from the route planning worksheet it inherits the dock (and from that the bin code). When the dock was changed on the route planning line, it did not update the warehouse header with it. That has been corrected.



 Note

Just like in std. BC Dock and Bin code can only be updated in an open warehouse shipment/receipt and the bin code on existing lines is not updated automatically, the user should do that manually.

## PBI 221357 - Qty Pallet and Qty Transport UOM updated with the wrong sign

### What

When you changed the transportation unit or -quantity on an item card with history, it update the item ledger entries with a positive sign in the Quantity (Pallet) and the Qty Transport. Unit. Both outbound and inbound item ledger entries. That has been corrected.

## PBI 221497 - Status Completely Picked is given to early - shipment only partially picked in reality sign

### What

When a Warehouse Shipment was partially picked, the Logistical Status of the related sales order could already show the "Warehouse Picked" status. This is solved.

## PBI 221642 - Route Planning - Move transfer orders does not work

### What

Moving a transfer order to another route or date in the route planning worksheet or in the order did not synchronize well between route request line and order. That has been resolved.

## PBI 221900 - Delivery type and Delivery time code not ok in route planning worksheet

### What

In the route planning worksheet the Delivery time code could not be modified in the request line. Also the fact box did not show all possible delivery times for an order. That has been resolved.



## PBI 222615 - Find Entries error when route planning contains posted order and linked return order

**What,**

When a sales return order was created with the same document no as the sales order no (function **Create/Modify Return order** does that) and shipments and receipts were posted, the **Find Entries** action gave an error. That has been resolved.



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## Features

| PBI No.                | Description                                                                        |
|------------------------|------------------------------------------------------------------------------------|
| <a href="#">180567</a> | Cut-off time per route                                                             |
| <a href="#">208713</a> | Process statuses warehouse & logistics - event/triggers outbound                   |
| <a href="#">210668</a> | Process statuses warehouse & logistics - redesign of table warehouse statuses      |
| <a href="#">211642</a> | Allow Logistic user to add or remove orders to a fixed route planning no.          |
| <a href="#">215284</a> | Route list (limited) per customer and vendor                                       |
| <a href="#">216651</a> | Extensibility on logistic                                                          |
| <a href="#">216966</a> | Field <b>Delivery Sequence</b> on <i>Route Planning Request</i> Table              |
| <a href="#">217129</a> | Route planning - Moving Route Planning Lines with pop-up also in request line part |

## Resolved issues

| PBI No.                | Description                                                          |
|------------------------|----------------------------------------------------------------------|
| <a href="#">218031</a> | Fix error on create new doc from customer/Vendor list or card. (LOG) |

## PBI 180567 - Cut-off time per route

### What

Prevent releasing documents to a route when the date and time is due for entering a document.

### Why

Sales orders are delivered as soon as possible. When an order is created before a certain time it can be delivered the same day, or the next day, or the day after... As a route planner I want to be able to define 'cut-off times' per route, defined by a time and a no. of days. e.g orders for a delivery route created before 13.00 today, can be delivered tomorrow, else it will be later. An order intaker should be alerted on that.



## How

Setup on the logistic employee.

1. Select the Search icon , enter **Logistics Employees List**, and then choose the related link.
2. Edit the list for the Logistics Employees List.
3. Setup the field *Route Cut off warning*.
4. No warning, warning or blocking are the possible options.

## PBI 208713 - Process statuses warehouse & logistics - event/triggers outbound

### What

Process statuses warehouse & logistics - event/triggers outbound.

### Why

As a warehouse manager/customer service/transport planner I want to be able to follow up the status of my outbound process by using warehouse/process statuses that will be triggered by an event or a manual selection of the new status.

### How

Drink-IT has generated for the sales order a list of actions which will influence the logistic status on an automatic way in Microsoft Dynamics 365 Business Central.

1. Select the Search icon , enter **Actions List**, and then choose the related link.
2. The available actions list will appear, this list is created by the system. New actions can be added by Development.

These actions can be triggered in the setup of the **Logistic Statuses**.

## PBI 210668 - Process statuses warehouse & logistics - redesign of table warehouse statuses

### What

Process statuses warehouse & logistics: Depending on the moment we are in the logistics/warehouse process, we want sales orders/route planning to get a status so you can do a complete follow up of an order/shipment/route planning.



## Why

As a warehouse manager, transport planner, customer service,... I want to be able to follow up the warehouse/logistics process by means of process statuses that indicate where we are in the logistics/warehouse process. We want sales orders/route planning to get a status so you can do a complete follow up of an order/shipment/route planning. As a transport planner/warehouse manager I also want to use the statuses to make it possible to block certain actions. For example when a route planning is fixed a sales order should not be modified.

## How

1. Select the Search icon , enter **Logistic Statuses**, and then choose the related link.
2. On the **Logistic Statuses** page, fill in the fields as necessary. Hover over a field to read a short description.
3. Specify the *code*, if there is an automatic trigger to set the status, specify the *action* trigger so statuses will be updated automatically when this action is being executed by the system.
4. If no *action* trigger is being set, this indicates that this is a manual trigger for the system.
5. *Display order*, *Allowed Back Step* and *Allowed Next Steps* are mandatory to create a correct flow.
6. *Allowed on Post Shipment* or *Allowed on Post Invoice* enables posting Shipment and/or Invoice from this Status. If the field is not checked, posting will be blocked if a document has this status.

## PBI 211642 - Allow Logistic user to add or remove orders to a fixed route planning no.

### What

A Route planning no can be checked as **Fixed**. Allow per Logistic employee if it is allowed to move orders from and to a fixed route planning no.

### Why

When a route planner has fixed a route/drive for a shipment date (route planning no), it should not just happen that new orders are added to it or that orders are removed from it (pallets may already have been prepared, even loaded into the truck). Only Logistic users with permission should be able to do so.

### How

Open the **Logistic Employees List**. By default all uses have the permission to change fixed route planning nos. Set field **Allow To Change a Fixed Route planning to Blocking** if a user is not allowed, set it to **Warning** when the user is allowed, but will be prompted with a warning first. **No Warning** means the user can move an order to a fixed route or remove an order from it, without getting a warning.

Orders can be moved to or removed from a route planning no in following ways. from the order by changing the route or shipment date. from the route planning request lines by changing route, shipment date or drive. from the



route planning header and -request lines by the Move Route Planning function. When a new order is created for route + shipment date, a new drive is created automatically when existing one(s) were set to Fixed. The same goes for orders moved to a route + shipment date.

## PBI 215284 - Route list (limited) per customer and vendor

### What

Source Routes from Customer or Vendor.

### Why

As a Logistics planner I want to rely on that, not plan customer orders in wrong routes.

We have our routes organized by day and by region. Customer are assigned a default route and allowed to some other routes, but not all. A customer in the north should never be assigned to a route in the south. Same for weekdays. We have contracts with customers that they are delivered on one or two fixed days in the week, the order intaker should not deviate from that. Same for vendors when we have to plan a pickup.

### How

Setup on the Customer or Vendor

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Open the card of the customer for which you want to set Delivery Sequence.
3. On the **Logistic** FastTab, open the Source Route using the assist drill down button of the field *Route*.
4. The page **Source routes** will be opened, Multiple Source routes can be defined.
5. Fill in the necessary fields.
6. On the logistic FastTab of the customer card, the field *Route Limit* can be enabled.
  - Enabled, specifies if only routes from the source routes may be selected. The field Route becomes uneditable, a user can only change routes by drilling down to the source routes table or by the functions Next route planning no. resp. Previous route planning no.
  - Disabled, specifies a user can still select all routes in an order.

## PBI 216651 - Extensibility on logistic

### Technical change

Expectation is that changing a route, drive, shipment / receipt date the code from the product has one flow, but the project team can extend, replace the code from the product and make there own solution concerning what is happening when I change one of the key fields from logistic.



- Route
- Drive
- Shipment / receive date

Especially with integration of warehousing and external integration apps.

## PBI 216966 - Field 'Delivery Sequence' on Route Planning Request Table

### What

Delivery sequence from Source Routes to the Route planning worksheet.

### Why

As a transport planner I would like to be able to create a delivery sequence of the orders in one route in the route planning request page so that I can define a logical route for the truck driver.

### How

The flow of the field **Delivery sequence** goes from Source route to Sales Order to the route planning. Equal setup and functionality is available on Purchase.

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Open the card of the customer for which you want to set *Delivery Sequence*.
3. On the **Logistic** FastTab, open the Source Route using the assist button of the field **Route**.
4. The page **Source routes** will be opened, the *Delivery Sequence* can be setup for this customer on this route.
5. A new sales order will inherit this value from the previous setup. Changes can be made manually or by selecting another route.
6. By releasing the sales order the route planning request is created and will inherit the value of *Delivery Sequence* from the Sales document. Changes can be made manually in the route planning request.

## PBI 217129 - Route planning - Moving Route Planning Lines with Pop-Up also in Request line part

### What

Function Move Route Planning in the route request lines page, to move multiple selected orders at once.

### Why



Moving multiple orders to another route, date or driver could already be done from the header part in the route planning worksheet, for all orders at once. It was requested to have that function in the request lines section as well, for selected orders.

## How

1. Select the Search icon  , enter **Route Planning Worksheet**, and then choose the related link.
2. Open the Route Planning Worksheet by using the filter options.
3. Select a route planning no. with orders linked to it.
4. Select one or multiple lines in the **Route planning Request** and click on **Move Route Planning** from the Route planning request ribbon below Route planning.
5. Select new route, driver and/or Shipment/receipt date and click OK.
6. The selected orders will be moved.

## PBI 218031 - Fix error on create new Doc from customer/Vendor list or card. (LOG)

## What

When you created a **New Document** from the Customer List, or Customer Card, the system gave an error when the customer was setup with automatic inserted recurring sales lines. This is solved.



# 18.202203.0.0

Release Note • 1/10/2024 • 9 min read

## Features

| PBI No.                | Description                                                                                                        |
|------------------------|--------------------------------------------------------------------------------------------------------------------|
| <a href="#">209945</a> | Change Logistic fields in a released order may require to recalculate charges.                                     |
| <a href="#">210119</a> | The field <b>Shipment Method</b> should be disabled when the field <b>Multiple Order Route</b> is enabled.         |
| <a href="#">212364</a> | Warning <i>new line created</i> , when changing the quantity on sales order when no warehouse shipment is created. |
| <a href="#">213419</a> | It should not be possible to move an order that is part of a warehouse shipment/receipt to another RP No.          |
| <a href="#">214024</a> | Create warehouse shipment/receipt from route request lines should also give the <i>Combine</i> option.             |

## Resolved issues

| PBI No.                | Description                                                           |
|------------------------|-----------------------------------------------------------------------|
| <a href="#">210103</a> | Logistics FactBox is not update when moving from document to another. |
| <a href="#">214009</a> | Locations are not updated as expected into return document.           |

## PBI 209945 - Change Logistic fields in a released order may require to recalculate charges

### Why

As a Logistics manager, it may happen that I am asked to change certain fields for a (released) order in my route planning activities. A customer may ask to delivery another day, or change the shipment method from pickup to delivery. It may even happen that I have to move an entire drive (multiple orders) to the next day, eg when a driver is ill, or a vehicle malfunctioning.

I want to be able do so in an efficient and simple way.

### What



Shipment date/exp. receipt date, shipment method are criteria in Sales and purchase conditions and partly in Taxes and EG rules.

- When SPC is enabled, it will require to recalculate condition lines.
- When TAX enabled, it will require to recalculate condition lines.
- When EGM is enabled, it will require to recalculate condition lines.

The user should be asked one time to confirm this. If yes,

- Reopen order, Update changed criteria field, release again with new recalculation of document APP lines and attached charge lines.
- when changed for an entire drive (multiple orders): ask only one time, not per order again.
- when the criterion is in place for multiple extensions (SPC, TAX, EGM), ask only one time, not per App again.

### How

1. Search for foundation Setup.
2. On **General** tab in the Foundation Setup, the field **Allow DIT lines recalculation on released orders** will steer the functionality of changing key values in a released order even changing this from the Route planning worksheet.

## PBI 210119 - The field shipment Method should be disabled when the field "Multiple Order Route" is enabled

### Why

Changing setup data from Logistics can lead to unexpected values on the route planning worksheet when a multiple order route is enabled.

### What

If one of the key fields is setup for a route , it will be disabled for the customer, vendor , purchase and sales documents. The key fields are:

- Shipping location/Receipt location
- Shipping agent code
- Shipping agent service code
- Shipment method code

### How

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



2. Enable **Multi order Route** and select a shipment method.
3. Select the Search icon , enter **Customer**, and then choose the related link.
4. Select the **Route** on the customer card on the tab **Logistics**.
5. Notice that **Shipment Method** is not editable and inherits the value from the route.

## PBI 212364 - Warning 'new line created', when changing the quantity on sales order when no warehouse shipment is created

### Why

When a order intaker makes a change to an order we want to notified if a change is made on the order document. Only when this change has an impact to pay attention on.

### What

In case we make a change to an order that has a location with warehouse documents actived, we don't need an notification if the warehouse documents where not yet created.

### How

1. Create a new Sales Order with a customer which is linked to a route with a warehouse mandatory location.
2. Release the Sales Order.
3. The route planning is created, to be checked in the tab **LOGISTICS**.
4. Reopen the Sales Order.
5. Add a new line.
6. Release the Sales Order.
7. Check the Route planning worksheet for the route planning no., **NO warning** is created.
8. Create the warehouse document from the Route planning no.
9. Reopen the Sales order.
10. Add a new line.
11. Release the Sales order.
12. Check the Route planning worksheet for the route planning no., **warning** 'New line created' is visible on the route planning no. and Route planning request page.
13. After executing the action **create/modify warehouse shipment** the warning will disappear.



## PBI 213419 - It should not be possible to move an order that is part of a warehouse shipment/receipt to another RP No.

### Why

Changing route planning after a warehouse document was created conflicts with standard BC rules.

### What

In case of a multiple order route this functionality has an impact. Multiple Order route can have the impact that one warehouse document is created for multiple order lines linked to the Route planning line. This is depending if you choose during creation of the warehouse document to use the combine functionality. A change in the warehouse documents can only be applied when the warehouse document can be reopened. The move functionality in the route planning worksheet will automatically reopen the warehouse document, delete the order from the warehouse document, create or modify a new warehouse document for the other route planning line.

### How

1. Select a route planning line.
2. Warehouse documents are created for this route planning line.
3. Go to the route planning request part of the page.
4. Change the route or drive no. for the route planning request.
5. Select **YES** on the question **Do you want to combine Warehouse Shipment?** If you want that the selected lines are added or created on one warehouse shipment for the new route or drive.
6. Select **NO** on the question **Do you want to combine Warehouse Shipment?** If you want that the selected lines creates for every order a separate warehouse document.

## PBI 214024 - Create warehouse shipment/receipt from route request lines should also give the 'Combine' option

### Why

As a planner I want to be able to create combined warehouse shipments or warehouse receipts from the Route planning worksheet undependently if you execute the action from the Route planning header or from the route planning Request page using the create warehouse functionality.

### What

When you execute the create warehouse functionality, the system will ask if you want to combine yes or No. The combine functionality creates a separate Warehouse Shipment/receipt per order or not.



## How

1. Select a route planning line in the route planning worksheet.

2. Go to actions and execute **Create/Modify warehouse Shipment**.

A question will pop-up, **Do you want to combine warehouse Shipment**.

- Upon selecting *Yes*, the warehouse shipment will be created for all orders linked to the route planning line.
- Upon selecting *No*, for every order linked to the route planning line will a warehouse shipment be created.

3. Select a route planning line in the route planning worksheet.

4. Select the order in the lower part **Route planning Request**.

5. Go to **Create Warehouse** and execute **Create/Modify warehouse Shipment**.

A question will pop-up, **Do you want to combine warehouse Shipment**

- Upon selecting *Yes*, the warehouse shipment will be created for all orders linked to the route planning line.
- Upon selecting *No*, for every order linked to the route planning line will a warehouse shipment be created.

## PBI 210103 - Logistics FactBox is not update when moving from document to another

### Why

Bugfix

### What

Refresh the logistics fact box , after an update on documents. The fact box will be updated after a refresh on the page.

## PBI 214009 - Locations are not updated as expected into return document

### Why

Bugfix When a return order is created the shipping location was incorrect.

### What

When select a route into a purchase return order, the location should be the shipping location. When select a route into a sales return order, the location should be the receipt location.



# 18.202201.0.0

Release Note • 12/4/2023 • 3 min read

## Features

| PBI No.                | Description                                                                                           |
|------------------------|-------------------------------------------------------------------------------------------------------|
| <a href="#">176003</a> | Change Logistic fields in a released order may require to recalculate charges                         |
| <a href="#">198560</a> | Vehicle load zones                                                                                    |
| <a href="#">198872</a> | Multiple delivery times on a day                                                                      |
| <a href="#">202898</a> | Route Planning from Transfer Orders                                                                   |
| <a href="#">202930</a> | Route Planning for Sales Return Orders                                                                |
| <a href="#">202931</a> | Route Planning for Purchase Return Orders                                                             |
| <a href="#">205731</a> | Warehouse Integration from route planning worksheet                                                   |
| <a href="#">207579</a> | Warning on route planning worksheet when a document is changed after warehouse documents are created. |
| <a href="#">208182</a> | Route planning for Purchase Orders                                                                    |
| <a href="#">208470</a> | Wrong quantity pallet calculation in sales, purchases, and transfer orders                            |
| <a href="#">209047</a> | Route planning no should not inherit values from an order                                             |
| <a href="#">209050</a> | Posting shipment/receipt should not update an order with blank values form the route planning no      |
| <a href="#">209631</a> | Filter on Delivery Times in transfer order is reversed                                                |

## PBI 176003 - Change Logistic fields in a released order may require to recalculate charges

**WHY** When a key field is changed on the Route Planning Worksheet a recalculating is necessary on the document is required because Tax or conditions can be impacted.

**WHAT** On Drink-IT foundation Setup is the field added :

Allow key fields change on Released Orders with the options



- No : there is no update
- Yes with Confirmation : update with confirmation
- Yes Automatic : automatically an update

**HOW** When one of the keyfields which have an impact on a document is changed the user will receive depending on the setup a correct message to execute the update of the document or no update at all will be executed.

## PBI 198560 - Vehicle load zones

**What** Vehicle load zones

**Why** When loading Pallets into trucks we plan with customer (address) constraints: on what side can the truck be unloaded at a customer's premise. In general you can define that by 3 major zones: left, right and backside. As a logistics manager I want to be able to plan the loading of my trucks in an additional, second detail level.

**How** See the online documentation for the new feature

## PBI 198872 - Multiple delivery times on a day

**What** Multiple delivery times on a day

**Why** As a route planner I want to be able to select multiple delivery times on a day so that I can cope with customers which are closed during certain time periods in a day.

**How** See the online documentation for the new feature

## PBI 202898 - Route Planning from Transfer Orders

See the online documentation for the new feature

## PBI 202930 - Route Planning for Sales Return Orders

See the online documentation for the new feature

## PBI 202931 - Route Planning for Purchase Return Orders

See the online documentation for the new feature



## **PBI 205713 - Warehouse Integration from Route planning worksheet**

See the online documentation for the new feature

## **PBI 207578 - Warning on Route planning worksheet when a document is changed after warehouse documents are created**

A warning is now created.

## **PBI 208470 - Wrong Quantity pallet Calculation in Sales, Purchases and Transfer orders**

See the online documentation for the new feature

## **PBI 209047 - Route planning no should not inherit values from an order**

**What** Route planning no should not inherit values from an order

**How**

## **PBI 209631 - Filter on Delivery Times in Transfer order is reversed**



# Introduction

Article • 1/9/2024 • 1 min read

The Aptean Beverage Logistics (LOG) extension, Drink-IT Edition, coordinate the planning of the transportation in a simple way.

The route planning worksheet will guide you for all document types, purchase, sales, returns, transfers, what needs to go out or comes in on a date and location. At the same time giving insight on shipment information as agents, services, vehicles, drivers, weight, pallets, delivery times to plan manually all document types to a certain route. After planning it can be integrated in the further warehouse processes.

## ! Note

All the fields mentioned in the document are not available by default in the Business Central. Such fields can be viewed after personalization.

## Business Processes

- [Release notes](#)
- [Getting Started](#)
- [Create your own demo Company](#)
- [Setting up Logistics](#)
- [Training](#)
- [Business Process Walkthroughs](#)
- [App Design Details](#)



# Create your own demo company

Article • 2/7/2025 • 4 min read

Aptean Beverage is available in multiple countries. For each country, a dedicated demo company is available. This country specific company contains setup that is specific for that country (VAT, excises, language, etc.). They are all based on the Business Central Cronus company for that country. With this company, you can:

- Verify the example [Setup](#).
- Execute the [Walkthroughs](#) in our online documentation.

## Install Drink-IT

1. Select the Search icon , enter **Extension Marketplace**, and then choose the related link.
2. Search **Aptean Beverage Drink-IT Edition**.
3. Select the bundle that meets your business requirements.
4. Select the **Free trial** action and install the app.

## Create the demo company

1. Select the Search icon  , enter **Data Import Wizard**, and then choose the related link.

The **Data Import Wizard** page opens.

2. Select **Next**.
3. In the **Company Selection** field, select *New Company*.
4. In the **New Company Name** field, enter a name.
5. Select **Next**.
6. Select the **Upload a file to import** link and then select the .zip file for your country.
7. Select **Next**.
8. Select **Finish** to create your demo company. This will take one hour or more.

### Note

Names and codes in your Drink-IT demo company can differ from the ones used in the walkthroughs. Since the Drink-IT setup is the same for all the countries, the walkthroughs can be used in every country. In the country specific deviations, you can verify these deviations.



# Setting up logistics

Article • 3/20/2024 • 1 min read

Before you can start using Drink-IT Logistics there are few things to setup.

The following table describes a sequence of tasks, with links to the topics that describe them.

| To                                                               | See                                                                     |
|------------------------------------------------------------------|-------------------------------------------------------------------------|
| Set up permission sets                                           | <a href="#">Manage permission sets</a>                                  |
| Logistics Setup                                                  | <a href="#">Setting Up Logistics</a>                                    |
| Setup Logistic Employees for Logistics                           | <a href="#">Setting Up Logistic employees</a>                           |
| Define the Routes to be used in the Route planning               | <a href="#">Setting Up Routes</a>                                       |
| Define the delivery types used in the Route planning             | <a href="#">Setting up Delivery types</a>                               |
| Check specific Drink-IT Foundation Setup to be used in Logistics | <a href="#">Setting Up Drink-IT Foundation</a>                          |
| Define vehicles to be used in the Route planning                 | <a href="#">Setting Up Vehicles</a>                                     |
| Define drivers to be used in the Route planning                  | <a href="#">Setting Up Drivers</a>                                      |
| Setup for customer and customer ship-to Address for Route        | <a href="#">Setting Up Logistic information for a planning customer</a> |
| Setup for vendor and vendor Order Address for Route              | <a href="#">Setting Up Logistic information for a planning vendor</a>   |
| Define transfer routes to be used in the Route planning          | <a href="#">Setting up Transfer routes</a>                              |
| Setup for item for Route planning                                | <a href="#">Setting Up Logistic information for an item</a>             |

# Manage permission sets

Article • 10/23/2024 • 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 *LOGISTICS107FDW*.

## 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 *LOGISTICBASIC107FDW*.

## 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 Beverage Logistics extension, ensuring secure and role-based access.



# Setting up logistics

Article • 3/18/2025 • 2 min read

No. Series has to be setup for the route planning.

1. Select the Search icon  , enter **Logistics Setup**, and then choose the related link.
2. On the **Logistics Setup** page, fill in the fields as necessary.  
Hover over a field to read the tooltip.
3. Turn on the **Show Customer Address for Sales Return Order** toggle to display the sell-to customer address on the **Route Planning Worksheet** page for sales return orders instead of the ship-to address.  
This ensures that logistics teams can properly schedule return pickups based on the actual customer location, optimizing truck space and route planning.
4. On the action bar, select **General > Logistic Employees**.  
The **Logistics Employees List** page opens.  
You can set up the default settings for logistics operations such as route planning worksheet on this page.
5. On the **Logistics Setup** page, on the action bar select **Delivery > Delivery Types**.  
The **Delivery Types** page opens.  
You can set up the delivery types such as forklift available, manually load/unload, pickup, or any other type that can be assigned to customers and vendors.



# Setting up logistic employees

Article • 2/12/2026 • 2 min read

For each user you can set defaults for filters applied when opening the route planning worksheet. Like viewing all routes until a date or only on a date, view the day, or week.

1. Select the Search icon  , enter **Logistics Employees List**, and then choose the related link.
2. On the **Logistics Employees List** page, fill in the fields as necessary. Hover over a field to read the tooltip.



# Setting up routes

Article • 3/22/2024 • 2 min read

Routes will help you with the planning of shipments and receipts. They can be assigned to customers, vendors, and transfer routes. Documents that are created with a route will inherit the setup of that route. These documents are shown with their details in the [Route Planning Worksheet](#), where you can execute your detailed daily planning.

1. Select the Search icon , enter **Routes**, and then choose the related link.
2. On the **Routes** page, fill in the fields as necessary. Hover over a field to read the tooltip.

## Note

- If **Multiple Order Route** is enabled, the following fields cannot be changed or selected in master data and in documents, as they are determined by the route planning no.
  - Driver
  - Vehicle
  - Trailer
  - Shipment Day
  - Shipping Agent and Service Code
  - Location
  - Return Location



# Setting up delivery types

Article • 3/22/2024 • 2 min read

For planning and reporting you can setup delivery types and assign it to a customer, ship-to-address, vendor, or Address code. Delivery types typically give an indication on the time it takes to unload or pickup goods at a delivery or pickup address.

1. Select the Search icon , enter **Delivery Types**, and then choose the related link.
2. On the **Delivery Types** page, fill in the fields as necessary. Hover over a field to read the tooltip.



# Setting up foundation

Article • 4/2/2024 • 2 min read

Logistics calculates with quantities (pallets) and pallet places. Prerequisite for that is that a pallet unit of measure code is defined in Foundation setup representing one pallet place.

1. Select the Search icon , enter **Drink-IT Foundation Setup**, and then choose the related link.
2. On the **Pallets** FastTab, fill in the **Pallet Place Unit Of Measure** and **Pallet Units of Measure** fields.
3. On the **Application** FastTab, fill in the **Allow DIT lines recalculation on released orders** field.

## Note

- The **Allow DIT Lines Recalculation on Released Orders** has three options :
- *NO* : Standard Business Central is active.
- *Yes with confirmation* : Gives the possibility to update logistic related fields and with positive confirmation the calculation of the Drink-IT lines will be executed.
- *Yes without confirmation* : Gives the possibility to update logistic related fields and automatically the calculation of the Drink-IT lines will be executed.

## See also

[Setting Up Foundation set-up](#)



# Setting up vehicle

Article • 3/22/2024 • 3 min read

You can register vehicles for planning purpose. Loading weights, maximum pallet places, and other logistical information will be used in the Route Planning Worksheet. Vehicles can be trucks, trailers, containers, or vans.

1. Select the Search icon , enter **Vehicle**, and then choose the related link.
2. On the **Vehicle** page, fill in the fields as necessary. Hover over a field to read the tooltip.

## To Vehicle load zone Template code

When you are loading pallets into trucks, you want to take the circumstances at the shipping address in account: on what side can the truck be unloaded. In general you can define that by three major zones: left, right, and backside. In the **Vehicle load zone template** you can setup pallet place capacities per zone. The template can be assigned to a vehicle.

3. Select the Search icon , enter **Vehicle Load zones templates**, and then choose the related link.
4. On the **Vehicle Load zones templates** page, fill in the fields as necessary. Hover over a field to read the tooltip.

See also

[Setting Up Aptean Beverage Foundation Management.](#)



# Setting up drivers

Article • 4/9/2025 • 2 min read

Drivers can be registered for planning and reporting purpose.

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

The **Drivers** page opens.

2. Fill in the required field values.

3. In the **Status** field, select the status of the driver. The available options are *Active*, *Inactive*, and *Terminated*.

4. In the **Type** field, select the role of the driver. The available options are *Driver*, *Co-Driver*, and *Both*.

When a driver or co-driver is linked to an employee number, the **Status** field automatically inherits its value from the associated **Employee Card** page and cannot be edited manually.



# Setting up logistic information for a customer

Article • 3/22/2024 • 4 min read

## In this article

### [Setting Up Shipping Addresses](#)

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. Select the **No.** to open the card page for the selected customer where you want to setup logistic information.
3. On the **Customer Card** page, on the **Logistics** FastTab fill in the fields as necessary. Hover over a field to read the tooltip.
4. On the **Delivery Times** field, there is the possibility to setup multiple delivery times related to customer, ship-to Address, and shipment day.
5. Select the value in the **Delivery Times** field to open the **Delivery/Pickup Times** page, fill in the fields as necessary. Hover over a field to read the tooltip.

#### Note

**Base Calander and Customized calendar** on the customer card below the **Shipping** FastTab will determine if a requested delivery day is a **non-working** day or not for the customer.

#### See also

[Register New Customers](#)

## Setting Up Shipping Addresses

1. Select the Search icon , enter **Customers**, and then choose the related link.
2. On the action bar, select **Related > Customer > Ship-to-Addresses**.
3. Open the **Ship-to Address List** card and select the shipping address where you want to setup logistic information.
4. On the **Ship-to-Address** page, on the **Logistics** FastTab fill in the fields as necessary. Hover over a field to read the tooltip.
5. On the **Delivery Times** field, there is the possibility to setup multiple delivery times related to customer, ship-to Address, and shipment day.
6. Select the value in the **Delivery Times** field to open the **Delivery/Pickup Times** page, fill in the fields as necessary. Hover over a field to read the tooltip.



# Setting up logistic information for a vendor

Article • 3/24/2024 • 4 min read

## In this article

### [Setting Up Order Addresses](#)

1. Select the Search icon , enter **Vendors**, and then choose the related link.
2. Select the **No.** to open the card page for the selected vendor where you want to setup logistic information.
3. On the **Vendor Card** page, on the **Logistics** FastTab fill in the fields as necessary. Hover over a field to read the tooltip.
4. On the **Delivery Times** field, there is the possibility to setup multiple delivery times related to vendor, order address, pickup, and day.
5. Select the value in the **Delivery Times** field to open the **Delivery/Pickup Times**, fill in the fields as necessary. Hover over a field to read the tooltip.

#### Note

On the **Customer Card**, on the **Receiving** FastTab, the **Base Calander** and **Customized calendar** field will determine if a requested pickup day is a *non-working* day or not for the vendor.

#### See also

### [Register New Vendors](#)

## Setting Up Order Addresses

1. Select the Search icon , enter **Vendors**, and then choose the related link.
2. On the action bar, select **Related** > **Vendor** and then select **Order Addresses**.
3. On the **Order Address List** page select the order address where you want to setup logistic information.
4. On the **Order Addresses** page, on the **Logistics** FastTab fill in the fields as necessary. Hover over a field to read the tooltip.
5. On the **Delivery Times** field, there is the possibility to setup multiple delivery times related to customer, ship-to address, and shipment day.
6. Select the value in the **Delivery Times** field to open the **Delivery/Pickup Times**, fill in the fields as necessary. Hover over a field to read the tooltip.



# Setting up transfer routes

Article • 3/22/2024 • 2 min read

1. Select the Search icon , enter **Transfer Routes**, and then choose the related link.
2. On the **Tran. Route Spec.** page, on the **Logistic** FastTab fill in the fields as necessary. Hover over a field to read the tooltip.
3. On the **Delivery Times** field, there is the possibility to setup multiple delivery times related to transfer-from and transfer-to.4.
4. Click the value in the **Delivery Times** field to open the **Delivery/Pickup Times**, fill in the fields as necessary. Hover over a field to read the tooltip.



# Setting up logistic information for an item

Article • 3/22/2024 • 2 min read

1. Select the Search icon , enter **Items**, and then choose the related link.
2. Select the **No.** to open the card page for the selected item where you want to setup logistic information.
3. On the **Item** page, fill in the **Default Transport Unit** and **Qty. Base UOM per Transport Unit** on the **Drink-IT Foundation** FastTab as necessary. Hover over a field to read the tooltip.

## Note

The **Default Transport Unit** field is automatically synced with the item Unit of Measures.



# Training

Article • 12/4/2023 • 1 min read

This selection of exercises will help you to get a better understanding of the Drink-it Logistics app. The exercises can be performed in the [CRONUS DIT DEMO company](#).

## ! Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

## ! Note

When you select role (profile) DIT Sales Order processor (via My Settings) your Home page will already show menu's you need in this exercise, and relevant logistic fields will show in list and card pages.

| To                                                     | See                                                       |
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| Exercise 2 – Route delivery sales orders               | <a href="#">Route delivery sales orders</a>               |
| Exercise 3 – Pickup orders                             | <a href="#">Pickup orders</a>                             |
| Exercise 4 – Cut-off time and fixed route planning nos | <a href="#">Cut-off time and fixed route planning nos</a> |
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# Exercise 1 - Master data

Article • 7/6/2023 • 8 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

## ! Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

Create yourself as a **Logistic Employee**.

- Route Filter: your 'NAME\*'
- Date View as: Date
- Date View by: Date
- Date as Formula: 1D
- Route Cut-off Warning: Blocking
- Allow to Change a Fixed route Planning: Blocking
- When you open the Route Planning worksheet an automatic filter will be set on your routes only, and on shipments for tomorrow that you will plan today.

## Exercise 1 - Master Data

### 1. Vehicles

Search for **Vehicle**.

Create a **new** vehicle

- Code: your NAME\_VAN
- Description: 'Small Van. Max 16000 kg; 12 pallets'
- Max. Capacity: 12000 kg and 12 pallet places

### 2. Drivers

Search for **Drivers**.

Create a **new** driver

- Code: your NAME\_DRIV



- Name: your description

### 3. Routes

Search for **Routes**.

#### 3.1 Create a **new** route

- Code: your NAME\_ROUTE1
- Name: Delivery route1 your name (NAME)
- Driver: this route has you (NAME\_DRIV) as default driver
- Vehicle: your vehicle is the default (NAME\_VAN)
- Shipping Location and Receipt Location: select BLUE-TP
- Multiple order route = yes

#### 3.2 Create another **new** route

- Code: your NAME\_ROUTE2
- Name: Delivery route2 your name (NAME)
- Shipping Location and Receipt Location: select BLUE-TP
- Multiple order route = yes

#### 3.3 Create another **new** route

- Code: your NAME\_PICKUP
- Name: Pickup by customers your name (NAME)
- Shipping Location and Receipt Location: select BLUE-TP
- Multiple order route = no

### 4. Customers

Search for **Customers**.

#### 4.1 Create a new customer by the **New** action

- Apply template Customers domestic (tax paid)
- FastTab **General**
  - Name: Your NAME1 (Retail)
  - FastTab Address&Contact
  - City: Birmingham
- FastTab **Invoicing**



- Customer Price Group RETAIL
- **FastTab Payments**
  - Payment Method: the customer pays by bank transfer;
  - Payment Terms: after 14 days
- **FastTab Logistics**
  - Route: select your route (NAME\_ROUTE1)
  - Source Routes:
    - drill down on the Assist-Edit button of the Route field
    - in this route the customer's default delivery sequence is 'B200' (like Zone B, 250)
  - Delivery Method; the customer has an own forklift driver to put-away the goods
  - Delivery Times: the customer can get delivered between 0900 and 1200 and in the afternoon between 1300 and 1600. Except on Friday, then he is open for deliveries between 0900 and 1300. Create 3 lines for this
    - Code: 1; fill starting time and ending time for the morning (default)
    - Code: 2; fill starting time and ending time for the afternoon
    - Code F1; Day: Friday; fill starting and ending time for Friday (default)

*In case Empty Good Management is installed and deposit is charged*

- **FastTab Empty Goods**
  - Empty Good Business Group: empty goods are traced and deposit is charged, within the same invoice. Select DEP.
  - Setup recurring sales lines: select Code EMPTY\_RET for your customer and set **Insert Rec. Lines on Return Entry** to Automatic. This will help you to register returned empties in an efficient way.

#### 4.2 Create another new customer by the **New** action

- Apply template Customers domestic (tax paid)
- **FastTab General**
  - Name: Your NAME2 (Pub)
- **FastTab Address&Contact**
  - City: Birmingham
- **FastTab Invoicing**
  - Customer Price Group PREM
- **FastTab Payments**
  - Payment Method: the customer pays by CASH



- Payment Terms: after OD (Cash on delivery)
- **FastTab Logistics**
  - Route: select your route (NAME\_ROUTE1)
  - Source Routes:
    - drill down on the Assist-Edit button of the Route field
    - in this route the customer's default delivery sequence is 'B150'
  - Key: the customer gave you a key of his pub; register the key no.
  - Delivery Method; your drivers will have to carry the goods inside themselves
  - Delivery Times: since your driver has the key of the customer's premises, register a normal working day in starting and ending time

*In case Empty Good Management is installed and deposit is charged*

- **FastTab Empty Goods**
  - Empty Good Business Group: empty goods are traced and deposit is charged, within the same invoice. Select DEP.
  - Setup recurring sales lines: select Code EMPTY\_RET for your customer and set **Insert Rec. Lines on Return Entry** to Automatic. This will help you to register returned empties in an efficient way.
  - Case: the customer will have to pay cash on delivery, the driver brings him the invoice with the delivery. It will mention the delivered goods and the total amount over it. The driver will deduct deposit over returned empties manually, a separate credit memo will be posted for that afterwards
  - Return Entry to Return order: set to yes for this customer

 **Note**

The **Return entry to Return order** can also be checked for customers who always demand returns to be credited on a separate credit memo.

#### 4.3 Create another new customer by the **New** action

- Apply template Customers domestic (tax paid)
- **FastTab General**
  - Name: Your NAME3 (Pub)
- **FastTab Address&Contact**
  - City: Birmingham
- **FastTab Invoicing**
  - Customer Price Group PREM



- **FastTab Payments**
  - Payment Method: the customer pays by CASH
  - Payment Terms: after OD (Cash on delivery)
- **FastTab Logistics**
  - Route: select your route (NAME\_ROUTE1)
  - Source routes:
    - drill down on the Assist-Edit button of the Route field
    - in this route the customer's default delivery sequence is 'B250'
  - Key: the customer gave you a key of his pub; register the key no.
  - Delivery Method; your drivers will have to carry the goods inside themselves
  - Delivery Times: since your driver has the key of the customer's premises, register a normal working day in starting and ending time

*In case Empty Good Management is installed and deposit is charged*

- **FastTab Empty Goods**
  - Empty Good Business Group: empty goods are traced and deposit is charged, within the same invoice. Select DEP.
  - Setup recurring sales lines: select Code EMPTY\_RET for your customer and set Insert Rec. Lines on Return Entry to Automatic. This will help you to register returned empties in an efficient way.

Case: the customer will have to pay cash on delivery, the driver brings him the invoice with the delivery. It will mention the delivered goods and the total amount over it. The driver will deduct deposit over returned empties manually, a separate credit memo will be posted for that afterwards

- Return Entry to Return order: set to yes for this customer

#### 4.4 Create another new customer by the **New** action

- Apply template Customers domestic (tax paid)
- **FastTab General**
  - Name: Your NAME4 (Retail+Owner)
- **FastTab Address&Contact**
  - City: Birmingham
- **FastTab Invoicing**
  - Customer Price Group RETAIL
- **FastTab Payments**



- Payment Method: the customer pays by bank transfer;
- Payment Terms: after 14 days
- **FastTab Logistics**
  - Route: select your 2nd route (NAME\_ROUTE2)
  - Source Routes:
    - drill down on the Assist-Edit button of the Route field
    - in this route the customer's delivery sequence is 'Zone' 'B200'
  - create another line for NAME\_ROUTE1. Here the default delivery sequence is 'B180'
  - Delivery Method; the customer has an own forklift driver to put-away the goods
  - Delivery Times: the customer can get delivered every weekday between 0900 and 1700.

*In case Empty Good Management is installed and deposit is charged*

- **FastTab Empty Goods**
  - Empty Good Business Group: empty goods are traced and deposit is charged, within the same invoice. Select DEP.
  - Setup recurring sales lines: select Code EMPTY\_RET for your customer and set **Insert Rec. Lines on Return Entry** to Automatic. This will help you to register returned empties in an efficient way.

## 5. Items

### Search for Items

#### 5.1 Create a new item

- Apply template Trade beer
- **FastTab General**
  - Description: your 'NAME Beer Crate 20x50CL'
  - Base Unit of Measure: select CRATE; confirm. By default the Sales UOM (FT Prices & Sales) and Purchase UOM (FT Replenishment) are the same.
- **FastTab Foundation**
  - Volume is 10 (L)
  - Net weight: 10 (KG)
  - Gross weight: 19,7 (KG) (volume + packaging; crate, bottle)
  - The Consumption UOM is BOTTLE and 20 bottles are in one crate
  - The Transportation UOM is PAL and 40 crates fit on one pallet



*In case Empty Good Management is installed and empty goods are tracked over this full good item, possibly charged with deposit*

- **FastTab Empty Goods**
  - Empty Goods Code: select the (combined) code for the German (DE) crate with 20 (empty) bottles

## 5.2 Create another new item

- Apply template Trade beer
- **FastTab General**
  - Description: your 'NAME Beer Can 6x33CL'
  - Base Unit of Measure: select TRAY; confirm. By default the Sales UOM (FT Prices & Sales) and Purchase UOM (FT Replenishment) are the same.
- **FastTab Foundation**
  - Volume is 1,98 (L)
  - Net weight: 1,98 (KG)
  - Gross weight: 2,5 (KG) (volume + packaging; tray,can)
  - The Consumption UOM is CAN and 6 cans are in one tray
  - The transportation UOM is PAL\_LG and 80 trays fit on one of this pallet type (PAL\_LG counts for half a pallet place).

This is a one-way packaged item, no deposit.

## 6. Locations

The first exercises are based on the location BLUE\_TP, which does not contain warehouse activities. The last exercise is based on location SILVER, which has warehouse activities (bins, shipments, receipts, pickup, Put-away).



## Exercise 2 - Route delivery sales orders

Article • 7/6/2023 • 7 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

### Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

## Exercise 2 – Route delivery sales orders

In this base scenario an integrated process is trained on

- Order creation
- Route planning
- Pick, Ship & Cash on Delivery Invoices
- Return entry of collected empty goods and return control
- Cash payment and cash control
- Invoice

In this base scenario's invoices are posted from the order.

- Search for **Foundation** setup, FastTab **Application**:
  - Field Prevent Invoice from Combined Shpt. Sales Order should be off.
  - Field Synch Sales Shipment date to Posting date: on
  - Field Allow DIT Lines recalculation on released orders: should be Yes, without confirmation. This will enable you to move released orders from one route to another route or date without having to reopen them first (moving an order to another route or shipment date may impact sales conditions).
- Search for **Sales & Receivables Setup**, FastTab **Background Posting**
  - When you check field Post & print with Job Queue, the Batch Post Sales Orders function will enable you to print the documents (delivery notes, invoices, credit memos) at the same time.

*This scenario includes Return Entry (from the route planning worksheet). Return entry is only available when Drink-it App **Empty Goods Management** is installed,*



 **Note**

Make sure your WORKDATE is set to TODAY (via [My Settings](#))

## 1. Order creation

Search for **Sales orders**.

1.1 Create a **new** order for your customer NAME1.

- Route is set by default to your NAME\_ROUTE1
- Select shipment date: tomorrow
- Create lines of type = Item
  - Your item NAME Beer Crate 20x50CL: 240 CRATES
  - Your item NAME Beer Can 6x33CL: 320 TRAYS
- Release the order.
  - Notice the Route Planning No. in the header
  - View the FactBox **Logistics**

1.2 Create a **new** order for your customer NAME2.

- Route is set by default to your NAME\_ROUTE1
- Select shipment date: tomorrow
- Create lines of type = Item
  - Your item NAME Beer Crate 20x50CL: 40 CRATES
  - Your item NAME Beer Can 6x33CL: 160 TRAYS
- Release the order.

1.3 Create a **new** order for your customer NAME3.

- Route is set by default to your NAME\_ROUTE1
- Select shipment date: tomorrow
- Create lines of type = Item
  - Your item NAME Beer Crate 20x50CL: 80 CRATES
  - Your item NAME Beer Can 6x33CL: 160 TRAYS
- Release the order.

1.4 Create a **new** order for your customer NAME4.



- Route is set by default to your NAME\_ROUTE2
- Select shipment date: tomorrow
- Create lines of type = Item
  - Your item NAME Beer Crate 20x50CL: 240 CRATES
  - Your item NAME Beer Can 6x33CL: 480 TRAYS
- Release the order.

### 2. Route Planning

Search for **Route Planning Worksheet**. Make sure your filter is set to your routes and the date filter is set to tomorrow.

Find 2 **Route planning Lines**, one for your route NAME1 and one for NAME2.

Select your first route planning no. and compare the **Max. Weight** with the actual **Shipping Weight** and the **Max. Pallet Places** with the actual **No of Pallets shipping**.

View the orders in the lower part, the **Route Request Lines**. View the actual **Shipping Weight** and **Shipping Pallet** per order.

Your first route planning no. is overloaded and you need to solve that first. Here are the options:

- Move orders to another route
- Move orders to another drive
- Select a vehicle with more capacity,
- Add a trailer to increase capacity
- Change the shipment date on some orders

Try them all out, and in the end set back to the original state

- Order1,2,3 on your route NAME1 (drive1) on shipment date tomorrow with your vehicle NAME\_VAN
- Order 4 on your route NAME2 on shipment date tomorrow

Notice the **Delivery Sequence** of your last order in the Route Request line.

Select vehicle T01 for your first route. As there is only one order assigned to your 2nd route and there is enough space in your first route (drive 1), move your last order to that route planning no.

Set the route planning no to 'Fixed'. Sort the Route Request Lines on field Delivery Sequence. Notice the Delivery sequence for your order #4 now.

### 3. Pick, Ship & Cash on Delivery Invoice



- (Batch) Print the picklists for all sales orders assigned to your route NAME1 (drive1), from the Route Planning worksheet.
- The goods have been picked, pallets prepared and loaded in the vehicle.
- Select first your order2 (for the cash payment customer) and click in the route request lines on the action Return Entry. Do the same for your order3, the other cash payment customer. This will create a return order in advance for these customers.
- Post & print the shipments, by the Post Batch Sales Orders function, for your orders in your route NAME1.
- Only for the orders with **Payment Method CASH**, Post & print the invoices, by the Post Batch Sales Orders function, for your orders in your route NAME1.

#### 4. Return Entry and Return Control

The driver has delivered the goods and collected back empty goods, signed off on the delivery notes.

Open the **Route Planning Worksheet**, set a filter on the shipment date and on your routes. Select the route planning line of the driver's drive. Register the returns per order/return order via the action **Return Entry**.

- Order1
  - 120 cases of the empty good item EMPTY DE CRATE 20x50CL
  - 120 crates of the empty good item EMPTY CRONUS CRATE 24x33CL
- Return Order2:
  - 40 cases of the empty good item EMPTY DE CRATE 20x50CL
- Return Order3:
  - 80 cases of the empty good item EMPTY DE CRATE 20x50CL
- From customer4 no empties were collected back.

Open the source document for your order1 and check the lines.

Open the source document for your return order2 and check the lines.

The warehouse employee counted and signed off the unloading of the vehicle. 200 Crates of EMPTY DE CRATE 20x50CL 120 Crates of EMPTY CRONUS CRATE 24x33CL

Register that in the **return control**. On the route planning line, click on **Return Control**, calculate lines and fill the **Counted Quantity** per item. Click on **Finish**.

There are return differences that you have to solve first by checking if you registered the returns well per order. Open the return entry for order1. The customer only returned 80 crates EMPTY CRONUS CRATE 24x33CL, it was a mistype. Correct the quantity in the return entry.



Open the return control again and recalculate lines (but leave the column Counted quantity unchanged). Finish the return control again.

The **Return control** status of the route planning line is now **Finished**.

## 5. Cash Payment and Cash Control

The driver collected 3700,- LCY cash money from your 2nd customer. Select the (return) order in the route request lines and register that in the Cash journal. Do not post the journal.

The driver collected 5000,- LCY cash money from your 3rd customer. Select the (return) order in the route request lines and register that in the Cash journal. Do not post the journal.

### Note

Payments of customers are registered with a negative amount in the Cash receipt journal.

The company cashier opens the cash receipt journal from the route planning line (header) and prints under the Posting action the Test report, checks the total amount and signs off the report.

The journal is not posted yet.

## 6. Invoice

Post batch sales orders for this route planning no with Ship and Invoice.

Post batch sales return orders for this route planning no. with Receive and Invoice.

Search for **Cash Receipt Journal** and open the batch name of your route planning no. Alternatively, open it from the route planning worksheet – cash journal.

Apply the payments to the posted invoice and posted credit memo, for each line. Then post the journal.



## Exercise 3 - Pickup Order

Article • 7/6/2023 • 2 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

### Note

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## Exercise 3 – Pickup Orders

In training **Route delivery sales orders** we showed route deliveries. Multiple sales orders were planned into one drive and delivered to the customer. In this training we show customers who come to your warehouse to pickup goods. Orders may still show in one route for the overview, but are **handled one by one**. It is similar for most export orders where shipping agents do the transport from your warehouse to the port.

### 1. Master Data

Search for **Routes**.

Create a new route

- Code: your NAME\_PICKUP
- Name: Order picked up by customer - your name (NAME)
- Shipping Location and Receipt Location: select BLUE-TP
- Multiple order route = no

Search for **Customers**. Filter on the customer's with your name.

- Change default route to NAME\_PICKUP

### 2. Order creation

Search for **Sales orders**.

Create the same orders as in training **Route delivery sales orders**, this time with your 'pickup' route.

### 3. Route Planning

Search for **Route Planning No**. Make sure your filter is set to your routes and the date filter is set to tomorrow. Select the route planning line of your pickup route.



When you agreed on a time slot for the customer, change the Delivery Sequence to that (eg. 1000, 1015, 1030...) and sort on it.

#### 4. Pick

Your customer<sup>1</sup> has arrived with his vehicle to pickup goods. Select the order in the route request lines and print from there the picklist.

#### 5. Return

The customer brought empty goods that are unloaded and counted first. Register that in the Return entry for the order:

- 40 Crates EMPTY DE CRATE 20x50CL

#### 6. Ship & Invoice

All ordered goods were picked and loaded in the vehicle of the customer. Post for this order the shipment and invoice.

Search for **Posted Sales Invoices** and view it.



# Exercise 4 - Cut-off time and fixed route planning nos

Article • 7/6/2023 • 2 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

## ! Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

## Exercise 4 – Cut-off time and fixed route planning nos

### 1. Master Data

Search for **Routes**. Create a new route

- Code: your NAME\_ROUTE3
- Name: Delivery route3 with cut-off time - your name (NAME)
- Driver: this route has you (NAME\_DRIV) as default driver
- Vehicle: your vehicle is the default (NAME\_VAN)
- Shipping Location and Receipt Location: select BLUE-TP
- Multiple order route = yes
- Cut-off No. of Days: 1
- Cut-off Time: 1300 (or earlier, it should be before your current time)

### 2. Order creation

Search for **Sales orders**.

Create a same sales order for your customer1 as in the training before.

Select in the header:

- Route: your NAME\_ROUTE3
- Shipment date: tomorrow

Release the order. It is not possible since you are too late.



These are the options you have

- Change the shipment date to a later date
- Ask an authorized logistic employee to release the order
- Select another route that still allows for tomorrow, like your route NAME\_ROUTE2

Try out each option and then set back the order to the original state and reopen it again, except for the last option: select your NAME\_ROUTE2, with shipment date tomorrow and release the order.

### 3. Route Planning

Select the route planning line for your NAME\_ROUTE2 for tomorrow and check the Fixed field.

Search for **Sales orders**.

Create a same sales order for your customer2 as in the training before.

Select in the header

- Route: your NAME\_ROUTE2
- Shipment date: tomorrow

Release the order.

Open the route planning worksheet for tomorrow. It now contains 2 lines for your NAME\_ROUTE2 for tomorrow. The 2nd drive is not fixed and your order is assigned to that.

From the Route request lines, move the order to drive1 for this NAME\_ROUTE2. When you are not allowed to do so, ask an authorized logistic employee for it. That person may decide that it is still possible to add an order to this fixed drive.



## Exercise 5 - Other document types

Article • 7/6/2023 • 5 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

### Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

## Exercise 5 - Other Document Types

### 1. Sales return order

In training **Route delivery sales orders** we have seen that sales return orders show up in the route planning worksheet. They were created automatically from the Return Entry page.

Sales return orders can also be created directly, like for a complaint. Such orders can be planned in the route planning worksheet, even integrated with orders telling the driver to collect them when he delivers new goods.

Search for **Sales return orders**

1.1 Create a new return order for your customer NAME1.

- Route: your route NAME2
- Shipment date: tomorrow
- Item NAME Beer Can 6x33CL: 10 TRAYS should be taken back, as they appear to be expired. Picked by accident.
- Release the return order

Search for **Sales orders**

1.2 Create a new order for your customer NAME1

- Route: your route NAME2
- Shipment date: tomorrow
- Item NAME Beer Can 6x33CL: 10 TRAYS (hopefully they will pick the right lot this time)
- Release the order.

Open the **Route Planning worksheet**, filter on your routes and shipment date = tomorrow

- Find the return order and order under the same route planning no



- Notice the **Shipping Weight** and **No. of Pallets** Shipping exclude inbound (return) lines.
- Open the source document of the return order and view the **Logistics** FactBox

## 2. Purchase order

Purchase orders only show up in the Route Planning Worksheet when the header contains.

- Route
- Exp. Receipt date

The expected receipt date is by default not filled in the purchase order. You can change that.

Search for **Foundation setup**, FastTab **Application**:

- Field Default Expected Receipt Date: set to Workdate
- Field Synch Purchase receipt Date to Posting Date: on

Search for **Vendors**

### 2.1 Create a new vendor by the **New** action

- Apply template Vendors domestic
- FastTab **General**
  - Name: Your NAME1
- FastTab **Address&Contact**
  - City: Birmingham
- FastTab **Payments**
  - Payment Method: we pay the vendor by a SEPA bank transfer;
  - Payment Terms: after 14 days
- FastTab **Logistics**
  - Route: select your route (NAME\_ROUTE2)

*In case Empty Good Management is installed and deposit is charged*

- FastTab **Empty Goods**
  - Empty Good Business Group: empty goods are traced and deposit is charged, within the same invoice. Select DEP.

Search for **Purchase orders**

### 2.2 Create a **new** order for your vendor NAME1.



- Route is set by default to your NAME\_ROUTE2
- Select exp. Receipt date: tomorrow
- Create lines of type = Item
  - Your item NAME Beer Crate 20x50CL: 240 CRATES
  - Your item NAME Beer Can 6x33CL: 320 TRAYS
- Release the order.
- Notice the Route Planning No. in the header
- View the FactBox **Logistics**

Open the **Route Planning worksheet**, filter on your routes and shipment/receipt date = tomorrow

- Find the purchase order under the route planning no
- Notice the Shipping Weight and No. of Pallets Shipping exclude inbound (return) lines.
- Open the source document of the order view the **Logistics** FactBox
- In the Route request lines you can set the delivery Sequence eg to agreed time slots (1000, 1015, 1030) and sort on that field.
- Other actions are similar available as for sales orders

### 3. Purchase return order

Search for **Purchase Return Orders**

3.1 Create a **new** return order for your vendor NAME1.

- Route is set by default to your NAME\_ROUTE2
- Select Exp. Receipt date: tomorrow
- Create lines of type = Item
  - Your item NAME Beer Can 6x33CL: 10 TRAYS
- Release the order.
- Notice the Route Planning No. in the header

Open the **Route Planning worksheet**, filter on your routes and shipment/receipt date = tomorrow

- Find the purchase return order under the route planning no
- Notice the Shipping Weight and No. of Pallets Shipping include all outbound lines.
- Open the source document of the return order view the Logistics FactBox
- In the Route request lines you can set the delivery Sequence eg to agreed time slots (1000, 1015, 1030) and sort on that field.



- Other actions are similar available as for sales orders

#### 4. Transfer order

Search for **Transfer Orders**

##### 4.1 Create a **new** transfer order

- From location: BLUE\_BOND
- To: location: BLUE\_TP
- Route: select your route NAME\_PICK
- Shipment date: tomorrow
- Lines
  - Your item NAME Beer Crate 20x50CL: 240 CRATES
  - Your item NAME Beer Can 6x33CL: 320 TRAYS
- Release the order.
- Notice the Route Planning No. in the header

Open the **Route Planning worksheet**, filter on your routes and shipment/receipt date = tomorrow

- For the transfer order 2 route request lines were created, one for the shipment and one for the receipt. Find them under your route planning no for NAME\_PICK
- Notice the Shipping Weight and No. of Pallets Shipping include all outbound lines.
- Other actions are similar available as for sales orders.



## Exercise 6 - Logistic statuses

Article • 12/26/2023 • 3 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

### Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

## Exercise 6 - Logistic Statuses

### 1. Master Data

Search for **Logistic Statuses**.

- Create a new **Logistic Status**
- Type: Sales Order
- Code: your NAME\_CHECKED
- Action code: leave blank
- Description: Loading complete checked
- Display order: in between PICKED and SHIPPED
- Allowed previous step: PICKED
- Allowed next step: SHIPPED
- Allowed on Post Shipment = yes

### Note

On the **Logistics Statuses** page, when none of the next step statuses has an action code as *WHSE. PICK CREATED*, an error occurs on the **Warehouse Shipment** page when using the **Create Pick** action and a warehouse pick is not created for that associated sales order.

### 2. Sales Order

Search for **Sales orders**

- Create the same order for customer your NAME1 as in training **Route delivery sales orders**.
- Notice the Logistic Status (on FastTab General or logistics; depending on your role (via **My Settings**)).



- **Release** the order and check the Logistic Status.
- Print the **Order confirmation** and check the Logistic Status
- Click on action **Update to next Logistic Status** and select the next status

Open the **Sales orders list** page and view the logistic status column.

- Open the **Route Planning Worksheet**, filtered on your routes, on orders to be delivered or received tomorrow.
- Notice the Logistic Status of your order in the **Route request line**.
- Print the **Picklist** for your order from the worksheet and check the Logistic Status
- You have checked that the goods are completely loaded, for this order. **Update the Logistic Status** to that, from the **Route Request Line**.
- **Post** the **shipment** of your order and check the Logistic Status.
- The route is finished. **Update the Logistic Status** to the last one ('ready to invoice'), from the **Route Request Line**.

#### Note

The list of **Action codes** is limited, but the field is extensible, which means you could add codes by a PTE (Per tenant extension), and develop logic on it. Eg. for an interface with a 3rd party logistics provider, where the logistic status should be updated from certain triggers.

### 3. Other Document types

Search for **Logistic Statuses**.

You can define statuses for document types: **Sales order**, **Sales return order**, **Blanket sales order**, **Purchase order**, **Purchase return order**, and **Blanket purchase order**. Each type has its own automatic triggers (**Action Codes**).

Within each type some **Action codes** are available that relate to warehouse activities (warehouse shipment, warehouse pick, warehouse receipt). In training **Warehouse integration** such warehouse activities are explained.



# Exercise 7 - Warehouse integration

Article • 7/6/2023 • 2 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

## Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

## Exercise 7- Warehouse integration

### 1. Master Data

Search for **Routes**.

- Create a new route
- Code: your NAME\_WMS
- Name: Delivery route from WMS location - your name (NAME)
- Shipping Location and Receipt Location: select SILVER
- Multiple order route = yes

Search for **Customers**. **Filter** on the customer's with your name.

- Change default route to NAME\_WMS

### 2. Order creation

Search for **Sales orders**.

Create the same orders for your customer NAME1, NAME2 and NAME3 as in training **Route delivery sales orders**, this time with your 'WMS' route.

### Route Planning

Search for **Route Planning No**. Make sure your filter is set to your routes and the date filter is set to tomorrow. Select the route planning line of your WMS route.

- Select a Vehicle and Driver
- Click on the (header) action **Create Warehouse Shipment**.
- Open the warehouse shipment via the **Find entries** action



Search for **Sales orders**.

Create the same orders for your customer NAME4 as in training Route delivery sales orders, this time with your 'WMS' route.

Search for **Route Planning No.** Make sure your filter is set to your routes and the date filter is set to tomorrow. Select the route planning line of your WMS route.

- Notice the Logistic Status of the 4 orders in this route planning no. the last one is new and not part of the warehouse shipment yet.
- Click again on the (header) action **Create Warehouse Shipment** and confirm to combine.
- Notice the Logistic Status of the last order.
- Open the warehouse shipment via the **Find entries** action and notice the lines for your last order were added.

Add returned empties via the route request line, function Return Entry, the same as in training Route delivery sales orders.

- Click on the (header) action **Create Warehouse Receipt**
- Open the warehouse receipt via the **Find entries** action and notice all returned empties are in.



## Exercise 8 - Relation with other apps

Article • 7/6/2023 • 8 min read

This exercise will help you to get a better understanding of the Drink-it Logistics App. The exercise can be performed in the [CRONUS DIT DEMO company](#).

### Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the training.

## Exercise 8 - Relation with other apps

Some features are enabled from other Drink-it Apps, but form a relevant part in the integrated 'Order2Cash' process (a 'day in a live' process), therefor they are mentioned here in this Logistics training document.

### 1. Return Entry (Empty Goods Management)

Beverage companies who (buy and) sell products in returnable packaging items face returns of empty goods. The Return Entry menu is embedded in the Route Planning Worksheet and explained in the training chapters for Logistics.

### 2. Backorders

Beverage companies often sell to customers in a recurring pattern, like a weekly order. Backorders are often not followed up on an existing order, as a new order will be made next week and the customer will just order it again then.

Backorder lines also disturb the overview on sales orders, especially with large numbers of orders per day. A normal 'day in a live' process is that orders are created, picked, shipped, returned empties added and in the end invoiced. Invoiced orders are removed then, so the order list gives a clean overview on all pending (new) orders.

Nevertheless, actions should be taken on order lines that are not available, or only partly available. The **Backorder Sales Lines** page provides you an overview, including a FactBox with the customer's details (phone no., mail address) to help you contact the customer to inform him and to ask for follow up.

Search for **Sales orders**.

2.1 Create a new sales order for customer NAME1, on your route NAME2, shipment date: tomorrow.

- Your item NAME Beer Crate 20x50CL: 80 CRATES
- Your item NAME Beer Can 6x33CL: 160 TRAYS



2.2 Create a new sales order for customer NAME2, on your route NAME2, shipment date: tomorrow.

- Your item NAME Beer Crate 20x50CL: 40 CRATES
- Your item NAME Beer Can 6x33CL: 160 TRAYS

After picking you have been informed that your item NAME Beer Can 6x33CL is not available anymore.

Search for **Backorder Sales Lines**. Set a filter on your item NAME Beer Can 6x33CL.

- Set the Qty to Ship on each order line to 0.
- You may want to call your customer or send an email, use the fact box for that.
- Customer2 decides to skip that item, as he will order again next week and can wait for that (the item is expected to be available then).
  - Set field **Backorder Type** to **No Backorder**
- Customer1 demands that the goods are delivered asap
  - Set field Backorder Type to Backorder via Blanket order when you want the order to be closed (removed) after shipping and invoicing and you follow up on the remaining backorder line by a blanket sales order (and a new sales order out of that)
  - When you set/leave the field Backorder Type to Backorder via order the order will stay open until you shipped and invoiced this backorder line (as in standard BC).

The backorder type can be set by default in the **Reason codes**. The default reason code for the sales order is defined in **Foundation Setup**.

When you are finished, select your sales order lines and click on action Process **backorder**.

The sales order lines do not show anymore in this page.

Open the sales orders for your customers NAME1 and NAME2. Select the line for the item, notice that the Quantity has been adjusted (made zero in this case) (page Inspection on the Line: search for field Original Quantity; this information will also be saved in the posted sales shipment line).

Search for **Blanket Sales Orders**. Open the last blanket order, the one created for your customer NAME1. Select the line (page Inspection on the Line: search for field **Original order**; this information will also be saved in the new order and the posted sales shipment line). Quantities in blanket sales order lines are recognized in item availability pages and requisition functions. You can create a sales order in following ways

- Push: click on the Make order action in the Blanket sales order
- Pull: open the Order Entry page from an existing (new) sales order and click on Get Blanket order lines.

Just as Backorders, the Order Entry page is a feature from Drink-it Advanced Sales Management



 **Note**

In case of warehouse activities, the backorder lines also show the Whs. Qty to Ship field, calculated from **warehouse shipment lines**. The Process backorder function will be based on that value then.

### 3. Periodic Invoice and -Credit Memos (Foundation)

In the training **Route delivery sales orders** we have shown a scenario where the driver brings the invoice to customers who have to pay cash on delivery, and deducts amounts for deposit over returned empty goods (and possibly also amounts over full goods that the customer did not accept) manually on the invoice. Most companies do not want that nowadays and prefer the 'suspended' credit on deposit procedure: credit returned deposit on the next (week's) invoice. This training will show how.

In addition, some customers demand a periodic invoice, eg a weekly or monthly invoice. Such 'combined shipments' invoices are created by a separate batch job, through a sales invoice document, rather than invoicing from the order.

Most companies prefer one way of working for all and invoice all sales shipments by this periodic activity, also the ones getting a daily invoice.

**Drink-it Foundation** contains functions **Create Periodic Invoices** and **Create Period Credit Memos** that replace standard BC functions **Combine shipments/return receipts**.

Search for **Foundation setup**, FastTab **Application**:

- Field Prevent Invoice from Combined Shpt. Sales Order should be on.

Search for **Customers** and filter on your customers.

- Set on FastTab **Foundation**.
  - Your customer NAME1 field Invoice Period to Day
  - Your customer NAME2 and NAME3: leave it blank
  - Your customer NAME4 Invoice Period to Month
- On FastTab **Shipment**
  - Check for your customer NAME2 and NAME3 that field Combine Shipments is on
  - w(for customer NAME1 and NAME2 this automatically comes from the invoice period)
- FastTab **Logistics**
  - Default Route for all your customers is your route NAME1.

Search for **Sales orders**.



### 3.1 Create a sales order for your customer NAME2 and NAME3

- with one line: item EMPTY DE CRATE 20x50CL; Quantity -/-40 (so a return)
- Release the order and post the shipment from the order document (F9)

Set your **workdate** one week ahead (via My Settings)

Search for **Sales orders**.

Create a new sales order for your customers in the same way as in the training **Route delivery sales orders**. Tomorrow in this case means one day after your workdate.

Release them all.

Open the **Route Planning Worksheet** with a filter on your routes and the shipment date of 'tomorrow'.

- Select the route planning line of your orders.
- Batch post the shipment for all orders of this route planning no.

The cash on delivery invoices are created from the route planning worksheet. Select the route planning line and click on action **Create Periodic Invoices**.

- Select Invoice Period = blank
- Set an additional filter on sales orders with Payment Method = CASH

Search for **Sales invoices**.

View the ones you just created (only for your customer NAME2 and NAME3). They contain the delivery of today and the returned empty goods of last week and show the amount that the customer has to pay to the driver. Select your invoices and **Batch post** them.

Open the **Route Planning Worksheet** with a filter on your routes and the shipment date of 'tomorrow'.

- Add returned items to all orders, as in the training Route delivery sales orders.
- Batch post sales orders for the route planning no.

The rest of the daily invoices are created at day-end, when all returns are completed.

Search for **Create Periodic Invoices**.

- Posting date: 'tomorrow'
- Starting date: leave blank
- Ending date: 'tomorrow'
- Select Invoice Period = Day



Search for **Sales invoices** and view the one you just created (should be only for your customer NAME1). It contains the delivery of today and the returned empty goods of today. **Post** the invoice (F9).

Search for **Sales Orders**.

Click in the list function **Delete Invoiced Sales orders**. After that you should not see this week's order of your customer NAME1 anymore.

For the orders of your customers NAME2 and NAME3: the returns will be invoiced next week and the order be removed then.

The invoice for your customer NAME4 will be created after month end by the same function **Create Periodic Invoices**, just with Invoice **Period = Month**.

 **Note**

In cases returns are in place and customers expect a clean invoice with deliveries and the returns on it, you could invoice an order too soon when running the Create Periodic Invoices batch job at the end of the day. Perhaps for some routes or orders the returns were not registered yet. In that case you better run that batch job with an additional filter on the Logistic Status ('Ready to invoice') and make sure this status is set by the logistics department after finishing a route.



# Business process walkthroughs

Article • 7/2/2025 • 2 min read

This selection of walkthroughs provides step-by-step, end-to-end business processes that you can perform using the [CRONUS DIT DEMO](#) demonstration company.

## Note

Create a copy of this company to keep your CRONUS DIT DEMO in the original state. In the copy you can do all the exercises that are included in the walkthroughs.

## Note

Drink-IT is available in multiple countries. For each country, a dedicated demo company is available. This country specific company contains setup that is specific for that country (VAT, excises, language, etc.). They are all based on the Business Central CRONUS company for that country. For that reason, names and codes in your Drink-IT demo company can differ from the ones used in the walkthroughs. Since the Drink-IT setup is the same for all the countries, the walkthroughs can be used in every country. In the country specific deviations, you can verify these deviations.

| To                                                                  | See                                                                              |
|---------------------------------------------------------------------|----------------------------------------------------------------------------------|
| How to use Logistics in Sales Orders                                | <a href="#">How to use Logistics in Sales Orders</a>                             |
| How to use Logistics in Sales Return                                | <a href="#">How to use Logistics in Sales Return Orders</a>                      |
| How to use Logistics in Purchase Orders                             | <a href="#">How to use Logistics in Purchase Orders</a>                          |
| How to use Logistics in Purchase Return                             | <a href="#">How to use Logistics in Purchase Return Orders</a>                   |
| How to use Logistics in Transfer Orders                             | <a href="#">How to use Logistics in Transfer Orders</a>                          |
| How to Use the Route planning worksheet                             | <a href="#">How to use Route planning worksheet in Logistics</a>                 |
| How to create warehouse documents from the Route planning worksheet | <a href="#">How to use warehouse documents from the Route planning worksheet</a> |

|                                         |                                                                |
|-----------------------------------------|----------------------------------------------------------------|
| How to Use Cut-off time per Route       | <a href="#">How to use Cut-off time per Route in Logistics</a> |
| Update logistics status in event orders | <a href="#">Update logistics status in event orders</a>        |



# Walkthrough: How to use logistics in sales orders

Article • 4/1/2024 • 3 min read

- Sales Orders inherits the logistic information from the sell-to customer no. or the Ship-to-Address but can be updated on the document.
- You can find it on the **LOGISTICS** FastTab. This information is used in route planning and can be printed on delivery notes.
- When the route has been setup with a default value, the order inherits it from the route, for the following fields:
  - Location
  - Shipment Method
  - Shipment Date

## Note

If in the route *Shipment day* is set, the shipment date will be calculated based on, **first date found from workdate**.

## Note

There is a check on the shipment date. You may not change the shipment date to a date that does not match the **Shipment day** of a route. Only for routes that do *not* have a value for **Shipment day**, you can select any date.

- For routes checked with **multiple order** following fields remain blank in the order and uneditable as they will be set in the route planning worksheet.
  - Driver
  - Vehicle (truck, container..)
  - Shipping Agent and -service code

## Note

When posting the **shipment** for an order they are **updated** from the route planning no into the **Sales** header, so the posted shipment header will contain all information.

- For routes not checked with **multiple order** any of these fields can be selected or changed.
- The **Logistics** FastTab shows:
  - The order totals OUT for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup.
  - The order totals IN for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup.

- The Total Quantity pallet IN, per pallet UOM code defined on any of the items.
- The Total Quantity pallet OUT, per pallet UOM code defined on any of the items.
- When the order is **released**, automatically a route planning no. is linked to the sales order based on the route and the shipment date. When an open route planning no. already exists for that it will assign it to that, else it will first create the route planning no (automatically).
- Select the Search icon  , enter **Sales Order**, and then choose the related link.
- On the action bar, select **New**.
- Fill in the fields as necessary to create a sales order. Hover over a field to read the tooltip.
- On the **Logistics** FastTab, the fields inherit from the route.
- Release the sales order, on the action bar, select **Release** > **Release**.
- After release, the field **Route Planning No.** specifies the route planned no. where the sales order is linked to.



# Walkthrough: How to use logistics in sales return orders

Article • 4/1/2024 • 3 min read

- Sales Orders inherits the logistic information from the sell-to customer no. or the Ship-to-Address but can be updated on the document.
- You can find it on the **LOGISTICS** FastTab. This information is used in route planning and can be printed on delivery notes.
- When the route has been setup with a default value, the order inherits it from the route, for the following fields:
  - Location
  - Shipment Method
  - Shipment Date

## ! Note

If in the route *Shipment day* is set, the shipment date will be calculated based on, **first date found from workdate**.

## ! Note

There is a check on the shipment date. You may not change the shipment date to a date that does not match the **Shipment day** of a route. Only for routes that do *not* have a value for **Shipment day**, you can select any date.

- For routes checked with **multiple order** following fields remain blank in the order and uneditable as they will be set in the route planning worksheet.
  - Driver
  - Vehicle (truck, container..)
  - Shipping Agent and -service code

## ! Note

When posting the **shipment** for an order they are **updated** from the route planning no into the **Sales** header, so the posted shipment header will contain all information.

- For routes not checked with **multiple order** any of these fields can be selected or changed.
- The **Logistics** FastTab shows:



- The order totals OUT for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup.
- The order totals IN for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup.
- The Total Quantity pallet IN, per pallet UOM code defined on any of the items.
- The Total Quantity pallet OUT, per pallet UOM code defined on any of the items.
- When the order is **released**, automatically a route planning no. is linked to the sales order based on the route and the shipment date. When an open route planning no. already exists for that it will assign it to that, else it will first create the route planning no (automatically).
- Select the Search icon  , enter **Sales Order**, and then choose the related link.
- On the action bar, select **New**.
- Fill in the fields as necessary to create a sales order. Hover over a field to read the tooltip.
- On the **Logistics** FastTab, the fields inherit from the route.
- Release the sales order, on the action bar, select **Release > Release**.
- After release, the field **Route Planning No.** specifies the route planned no. where the sales order is linked to.



# Walkthrough: How to use logistics in purchase orders

Article • 4/2/2024 • 4 min read

- Purchase Orders inherits the logistic information from the buy-from vendor no. or the Order Address but can be updated on the document.
- You can find it on the **LOGISTICS** FastTab. This information is used in route planning.
- When the route has been setup with a default value, the order inherits it from the route, for the following fields:
  - Location
  - Shipment Method
  - Expected Receipt Date

## Note

## Note

- For routes checked with **multiple order** following fields remain blank in the order and uneditable as they will be set in the route planning worksheet.
  - Driver
    - Vehicle (truck, container..)
    - Shipping Agent and -service code

## Note

When posting the **receipt** for an order they are **updated** from the route planning no into the **Purchase** header, so the posted **Receipt** header will contain all information.

- For routes not checked with **multiple order** any of these fields can be selected or changed.
- The **Logistics** FastTab shows:
  - The order totals OUT for Gross Weight1, Volume as defined in Drink-IT Foundation Setup.
  - The order totals IN for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup
  - The Total Quantity pallet IN, per pallet UOM code defined on any of the items.
  - The Total Quantity pallet OUT, per pallet UOM code defined on any of the items.



- When the order is **released**, automatically a route planning no. is linked to the purchase order based on the route and the expected receive date. When an open route planning no. already exists for that it will assign it to that, else it will first create the route planning no (automatically).
- Select the Search icon  , enter **Purchase Order**, and then choose the related link.
- On the action bar, select **New**.
- Fill in the fields as necessary to create a purchase order. Hover over a field to read the tooltip.
- On the **Logistics** FastTab, the fields are inherit from the route.
- Release the purchase order, on the action bar, select **Release** > **Release**.
- After Release the **Route Planning No.** field specifies the route planned no. where the purchase order is linked to.



# Walkthrough: How to use logistics in purchase return orders

Article • 12/4/2023 • 3 min read

- Purchase Return Orders inherits the logistic information from the buy-from vendor no. or the **Order Address** but can be updated on the document.
- Find it on the **LOGISTICS** FastTab. This information is used in route planning.
- When the route has been setup with a default value, the order inherits it from the route, for the following fields:
  - Location
  - Shipment method
  - Expected Receipt date

## ! Note

If in the route \*Shipment day/ is set, the expected receipt date will be calculated based on, **first date** found **from workdate**. The Expected Receipt date, updates the field in the purchase lines. So set it only if all lines in your order are expected to arrive on the same date.

## ! Note

There is a check on the shipment date. You may not change the shipment date to a date that does not match the **Shipment day** of a route. Only for routes that do *not* have a value for **Shipment day**, you can select any date.

- For routes checked with **multiple order** following fields remain blank in the order and uneditable as they will be set in the route planning worksheet.
  - Driver
  - Vehicle (truck, container..)
  - Shipping Agent and -service code

## ! Note

When posting the **return receipt** for an order they are **updated** from the route planning no into the **Purchase Return** header, so the posted shipment header will contain all information.

- For routes not checked with **multiple order** any of these fields can be selected or changed.
- The **Logistics** FastTab shows:



- The order totals OUT for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup.
- The order totals IN for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup
- The Total Quantity pallet IN, per pallet UOM code defined on any of the items.
- The Total Quantity pallet OUT, per pallet UOM code defined on any of the items.
- When the order is **released**, automatically a route planning no. is linked to the purchase order based on the route and the expected receive date. When an open route planning no. already exists for that it will assign it to that, else it will first create the route planning no (automatically).
- Select the Search icon , enter **Purchase Order**, and then choose the related link.
- On the **Purchase Orders** page, select **New**
- Fill in the fields as necessary to create a purchase order. Hover over a field to read the tooltip.
- On **Logistics** FastTab, the fields are inherit from the route.
- Release the Purchase Order, on the action bar select **Release** > **Release**.
- After release, the **Route Planning No.** field specifies the route planned no. where the purchase order is linked to.



# Walkthrough: How to use logistics in transfer orders

Article • 4/1/2024 • 3 min read

- Transfer Orders inherits the logistic information from transfer route for the from- and -to location, but can be updated on the document.
- Find it on the **LOGISTICS** FastTab. This information is used in route planning.
- Shipment date synchronize the receipt date.
- The **Logistics** FastTab shows:
  - The order totals OUT for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup.
  - The order totals IN for Gross Weight1, Volume1 as defined in Drink-IT Foundation Setup
  - The Total Quantity pallet IN, per pallet UOM code defined on any of the items.
  - The Total Quantity pallet OUT, per pallet UOM code defined on any of the items.
  - The total weights and no. of pallets are equal for OUT and IN.
- When the order is **released**, automatically a route planning no. is linked to the purchase order based on the route and the expected receive date. When an open route planning no. already exists for that it will assign it to that, else it will first create the route planning no (automatically).
- Select the Search icon  , enter **Transfer Order**, and then choose the related link.
- On the action bar, select **New**.
- Fill in the fields as necessary to create a transfer order. Hover over a field to read the tooltip.
- Fill in the shipment date, the receipt date is automatically synced.
- On the **Logistics** FastTab fields inherit from the route.
- Release the transfer order, on the action bar, select **Release** > **Release**.
- After release the **Route Planning No.** field specifies the route planned no. where the transfer order is linked to.



# Walkthrough: How to use route planning worksheet in logistics

Article • 3/18/2025 • 7 min read

The Route planning worksheet contains two sections and a FastTab.

- The top section counts the route planning no. and related information linked to the route that is copied into the route planning no. The unique route planning no. is created automatically when a document type is released with a route and shipment date (or Expected receipt date) for which no route planning no. was found yet.
  - Or you create it in advance by the **Create New Route Planning** action under **Home**.
- A route planning no. represents
  - A drive for delivery routes
  - A drive for van sales routes ('multiple order routes').
  - A drive for other types, then they serve as information, which orders needs to be shipped or are going to be received on a date. Typically for pickup orders and export orders (handled order by order).
- The fact box and the order section show information based on the selected route planning no.
- The order section shows sales orders and return orders, purchase orders and return orders and transfer orders (shipment vs receipt) that have been assigned to the route planning no.
- Select the Search icon , enter **Route Planning Worksheet**, and then choose the related link.
- The **Route Planning Worksheet** opens with filter setting as defined in the **Logistic Employees**.

## See also

[Setting Up Logistic employees](#)

## Create a new Route planning No.

- Route planning nos. are created automatically when an order is release for which no route planning no. exists, always based on route and shipment, or receipt date.
- Route planning no. can also be created in advance by the **Create New route Planning** function.
  - The function will suggest with the same values as the selected line, but you can change the route and shipment date.
  - When you leave them, it will create a new **drive**.
  - When you select another route/date for which already a route planning no. exists it will do the same. The new drive inherits the driver, driver2, vehicle/truck, trailer, shipping agent, and service code, but has no order



assigned yet.

## Information on weight and pallet places

- Per route planning line the route, drive, route name, shipment/receipt date are displayed.
- The total weight and total no. of pallet places are based on the assigned orders.
- You can personalize the page and add more columns. The FastTab shows the complete info. on the route planning no., as the location and shipping agent.

## Select drivers, vehicles and shipping agents

- You can select a vehicle and driver. The vehicle will set the max. Weight and Max pallet places in the route planning line.
- You can add columns **Driver2** and **Trailer** and select codes for them as well. The capacity of the trailer will increase the Max. Weight and Max Pallet places.
- You can add columns **Shipping Agent** and **Service code** and select values for these as well.
- Any of these values may come by default from the route but can always be altered here.
- Typically for **multiple order routes** you set these values on the **route planning line**. On **posting**, the posted shipment/receipts will inherit them (through an update on the order).

## Move a route planning no.

- Most likely orders are moved from one route planning no. to another, in the fine tuning of routes, but it may happen that a complete *driver* should be moved. Example, to another day, or to another route planning no. (merge small routes together).
- Use the action **Home > Move Route Planning**.
  - Select another route, shipment date, or drive and all orders will be assigned to the route planning no.
  - The route planning no. is not deleted, you can still plan on it, or remove it manually.
  - And the orders show under their new route planning no.

The shipment date, route number, and drive number can be updated in the sales orders and/or warehouse shipment without creating a new document. This improves flexibility in logistics planning and ensures accurate warehouse operations. When changing the shipment date, route, or drive number using the **Move Route Planning** action on the **Route Planning Worksheet** or **Route Planning Request** page, the system updates the existing sales order and/or warehouse shipment. The updated information is reflected on the associated warehouse shipment document, if it has already been created. These values cannot be updated if an open pick exists for the warehouse shipment document. License plates and registered warehouse picks will also be linked to the correct route planning



number. The route number and shipment date are also updated directly on the **Sales Order** page when there are no open warehouse activities.

## Print Route Planning Documents

Roadmap

## Create/open warehouse documents

Roadmap

## Return entry and control

Roadmap

## Set Logistic status

Roadmap

Currently you can check **Closed** field . The only impact it has is that new orders for the same route and shipment date/receipt date will be assigned to a new drive.

## Batch post orders

Roadmap

## Find Entries

## Move an order to another route or drive

- This process starts from the order section or **Route Planning Request**.
- Based on the capacity constraints of the vehicle and trailer the route planner may have to switch an order to another route planning no.
- An order can be moved to **another driver** of the same route.
  - Type the driver no. or drill down to select.



- The order does not show anymore under the route planning no., the totals show the shift. The order can now be found under the route planning no it was moved to.
- An order can be moved to **another route**.
  - Type the route no. or drill down to select.
  - The order does not show anymore under the route planning no., the totals show the shift. The order can now be found under the route planning no it was moved to.

## Change shipment date

Roadmap: change the shipment date of a released order.

## Information on the order

- This process starts from the order section or **Route Planning Request**.
- Delivery address information is as follow available :
  - Customer no., name, address, city, postal code
  - Customer key no
  - Delivery address constraints
  - Delivery type
  - Delivery times
  - Require 2 drivers
  - Unload Zone
  - Order total information as from the Logistic FastTab in the order :
    - Total Weight, Quantity (pallets),
    - Outbound and inbound (show columns)
    - Picking type (delivery pick, combined pick)

## Open the source document

- This process starts from the order section or **Route Planning Request**.
- Open the document from here depending on the document type.
  - Sales Order will open the **Sales Order** page.
  - Sales Return Order will open the **Sales Return Order Page**.
  - Purchase Order will open the **Purchase Order** page.



- Purchase Return Order will open the **Purchase Return Order** Page.
- Transfer Order Shipment or Transfer Order Receipt will open the **Transfer Order** Page.

## Return entry per order

Roadmap

The process is already available but not yet direct from Route Planning worksheet, for now open the source document and click **Return Entry**.

## Logistic status per order

Roadmap

## Print order Documents

Roadmap

## Post order

Roadmap



# Walkthrough: How to use warehouse document in route planning worksheet

Article • 4/1/2024 • 4 min read

You can select a route in the warehouse shipment, it inherits following fields, when set on the route:

- Location (only when no warehouse lines exist)
- Driver
- Vehicle (truck)
- Shipping agent + -service code

When the selected route is a multiple order route these fields become uneditable, they will then only be set in the route planning worksheet.

Warehouse shipments created from the route planning worksheet will inherit route, route planning and these fields from the route planning no.

## Warehouse shipment

The **Logistics** FastTab shows the order totals for Gross Weight1, Volume1 (as defined in *Foundation Setup*), and the no. of pallets (per pallet UOM code defined on any of the items).

## Warehouse receipt

You can select a route in the warehouse receipt, it inherits following fields, when set on the route:

- Location (only when no warehouse lines exist)
- Driver
- Vehicle (truck)
- Shipping agent + service code

When the selected route is a multiple order route these fields become uneditable, they will then only be set in the route planning worksheet.

Warehouse receipts created from the route planning worksheet will inherit route, route planning and these fields from the route planning no.



The **Logistics** FastTab shows the order totals for Gross Weight1, Volume1 (as defined in *Foundation Setup*), and the no. of pallets (per pallet UOM code defined on any of the items).



# Walkthrough: How to use cut-off time per route in logistics

Article • 4/2/2024 • 4 min read

When our customer **Fairway Sound Café** is ordering goods for Route *1210*, he needs to order before 2:00 PM and I as a sales employee wants to be informed if the order is entered after the cut-off time.

1. Select the Search icon  , enter **Logistics Employees List**, and then choose the related link for your user and change the **Route Cut off warning** filed to *Warning*.
2. Select the Search icon  , enter **Sales Orders**, and then choose the related link.
3. On the action bar, select **New**.
4. On the **General** FastTab in **Customer No.** field select *61000*.
5. Fill in the fields as necessary to create a sales order. Hover over a field to read the tooltip.
6. On the **Logistics** FastTab, change the **Route** by selecting the AssistEdit button to access the source route table.
7. Select route *1210*, this route has the setup for *Cut-off warning* of 1D and 2:00 PM.
8. On the **Shipping and Billing** FastTab, in the **Shipment Date** field is set to *May 3th 2022*.
9. On the **Lines** , select Item No. *1010* with a quantity of *10*.
10. Release the sales order, on the action bar select **Release** and then select **Release**. When releasing, a message box is displayed that the cut off time is due for the route and asks if you want to continue: Yes or No. By selecting **Yes**, the release will be executed, with **No** a message appears that the update is interrupted and the sales order cannot be released.
11. After Release the **Route Planning No.** field specifies the route planning no. where the sales order is linked to.
12. On the **Logistics** FastTab, verify the **Route Planning No.** field. Notice that the **Logistic Status** is changed to *Released*. In the **Logistics** FastTab, you can see 0.25 pallet in the *Total Quantity Pallet (OUT)* with a *Total Weight (OUT)* of 175.80 KG.



# Walkthrough: Update logistics status in event orders

Article • 7/15/2025 • 4 min read

As part of the event order process, you can update the logistics status on a sales order and its associated blanket sales orders. A confirmation message is displayed when you attempt to assign a status that allows sales invoicing, but not all linked sales orders meet that condition. This walkthrough demonstrates the steps and behavior based on your configuration in the **Logistics Statuses** page.

## Note

Ensure that the **Allowed on Create Sales Invoice** checkbox is cleared for the required logistics status with the code and description on the **Logistics Statuses** page.

## Create an event blanket sales order

To create an event blanket sales order, follow these steps:

1. Select the Search icon , enter **Blanket Sales Orders**, and then choose the related link.  
The **Blanket Sales Orders** page opens.
2. Select **New**.
3. On the **Blanket Sales Order** page, in the **Customer Name** field, enter *Selangorian Pub*.
4. Fill in the required field values.
5. On the **Drink-IT Foundation** FastTab, in the **Blanket Sales Order Type** field, select *Event* .
6. On the **Drink-IT Event Management** FastTab, in the **Blanket Sales Order Type** field, select *Event*. Confirm that the **Status** field value is blank on the **Logistics** FastTab.

## Update the logistics status

To update the logistics status, follow these steps:

1. On the **action bar**, select **Actions > Logistics > Update to next Logistics Status**.
2. Select **To Confirm**.
3. Select **OK**.  
The system updates the logistics status.



## Create a sales order from the blanket sales order

To create a sales order from the blanket sales order, follow these steps:

1. On the action bar, select **Make Order**.
2. On the **Blanket Order to Order (Event)** page, fill in the required fields.
3. In the **Item Type** field, select *All*.  
Alternatively, you can choose to create separate orders for the loan in use items and the other lines in your event order.
4. Select **OK**.  
The system creates a sales order based on the blanket sales order.

## Verify the logistics status in the sales order

To verify the logistics status in the sales order, follow these steps:

1. Open the newly created **Sales Order** page.
2. On the **Logistics** FastTab, confirm that the **Logistics Status** field value has been inherited from the blanket sales order.
3. You can update the status further by selecting **Actions > Logistics > Update to next Logistics Status** on the action bar.
4. Select **Order to confirm**.
5. Select **OK**.

## Change the logistics status on the blanket sales order

To change the logistics status on the blanket sales order, follow these steps:

1. Return to the associated **Blanket Sales Order** page.
2. On the action bar, select **Actions > Logistics > Update to next Logistics Status**.
3. Select **To Finish**.
4. Select **OK**.

If the new status allows sales invoicing, but any linked sales order has a logistics status that doesn't allow it, the system displays the following confirmation message:

*Not all sales orders allow to invoice. Are you sure to set the logistic status to this?*

5. Select **Yes** to proceed.

The system updates the logistics status on the blanket sales order.



 Note

If the **Allowed on Create Sales Invoice** checkbox is selected for the status with the *TO CONFIRM* code on the **Logistics Statuses** page, the confirmation message is not displayed, and the status change occurs without warning.



# Design details

Article • 7/6/2023 • 1 min read

This content contains detailed technical information about complex application features in Drink-IT Logistics.

Design details content is aimed at implementers, developers, and super users who need deeper insight to implement, customize, or set up the features in question.

