

User Manual

Aptean Food and Beverage ERP

Order Minimums

Product Documentation



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Release notes

Article • 1/28/2026 • 1 min read

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

Date	Release version	Description
January 2026	2601.0.0.0	Feature release
July 2025	2502.0.0.0	Feature release
February 2025	2501.0.0.0	Initial release



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Surcharges extension. For more information, see [Highlights of Surcharges, version 2601.0.0.0](#).

Integrations

The Apteian Order Minimums extension has been integrated with the Apteian [Surcharges](#) extension. To know more, see [Integrations](#).



2502.0.0.0

Release Note • 7/2/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Order Minimums extension, you can configure minimum order requirements for customers to prevent them from submitting orders below the specified thresholds on the e-commerce platform. To know more, see [Highlights of E-Commerce, version 2501.0.0.0](#).

Integrations

The Aptean Order Minimums extension has been integrated with the Aptean [E-Commerce](#) extension. For more information, see [Integrations](#).



2501.0.0.0

Release Note • 2/26/2025 • 2 min read

Features

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

- Create order minimum records and set up the amount, quantity, and gross weight requirements for various sources. For more information, see [Create order minimums](#).
- Define exclusions for order minimums based on, for example, location, shipment method, order type, or specific customers and vendors. For more information, see [Define exclusions for order minimums](#).
- Set up the customer and vendor attribute values to be used by default on order minimum records when the Aptean [Advanced Attributes](#) extension is installed. For more information, see [Set up order minimums](#).
- View details about the customer or vendor and the exclusions related to the selected order minimum record on the FactBox of the **Order Minimums** page. For more information, see [View additional details on the FactBox](#).
- Manage the error or confirmation messages that the system displays when releasing a sales or purchase order that do not meet the minimum order requirements. For more information, see [Manage sales and purchase orders](#).
- View order minimum records associated with a customer, ship-to address, vendor, or order address. For more information, see [View order minimum records](#).

Integrations

The Aptean Order Minimums extension has been integration with the following extensions:

- Aptean [Advanced Attributes](#)
- Aptean [Trade Management](#)

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



Introduction

Article • 2/26/2025 • 1 min read

The Apteian Order Minimums (OMN) extension helps you apply minimum order requirements for your customers and vendors. You can ensure your sales and purchase orders meet a minimum amount, quantity, and gross weight requirement, making it easy to set thresholds and validate orders accordingly.

With the Apteian Order Minimums extension, you can:

- Define flexible rules: Set minimum amount, quantity, and gross weight tailored to your business needs.
- Validate orders automatically: Ensure that sales and purchase orders meet the defined minimums before they are processed.
- Enhance operational control: Avoid errors and inefficiencies caused by incomplete or suboptimal orders.



Setup

Article • 2/26/2025 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up order minimums](#)



Manage permission sets

Article • 2/26/2025 • 3 min read

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

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

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

The direct permission set ID for this extension is *ORDERMINIMUMS167FDW*.

Indirect permission sets

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

The indirect permission set ID for this extension is *ORDERMINBASIC167FDW*.

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



Order Minimums

permissions to use the features of the Aptean Order Minimums extension, ensuring secure and role-based access.



Set up order minimums

Article • 2/26/2025 • 3 min read

You can set up the customer and vendor attribute value to display in the **Source No.** field on the **Order Minimums** page when the *Customer Attribute* or *Vendor Attribute* values are selected in the **Source Type** field.

Note

This setup is not mandatory and can be used only when the Aptean [Advanced Attributes](#) extension is installed.

The following procedure outlines how to set up customer and vendor attributes for order minimums.

1. Select the Search icon , enter **Order Minimum Setup**, and then choose the related link.
The **Order Minimum Setup** page opens.
2. On the **General** FastTab, in the **Vendor Attribute** field, select the vendor attribute you want the system to inherit in the **Source No.** field on the **Order Minimums** page by default.
You can select the values associated with this vendor attribute in the **Attribute Value** field of the **Order Minimums** page.
3. In the **Customer Attribute** field, select the customer attribute you want the system to inherit in the **Source No.** field on the **Order Minimums** page by default.
You can select the values associated with this customer attribute in the **Attribute Value** field on the **Order Minimums** page.

Note

The system displays an error if you change the **Vendor Attribute** and **Customer Attribute** field values on the **Order Minimum Setup** page when there are order minimum records with the **Source Type** field value set to *Customer Attribute* or *Vendor Attribute* on the **Order Minimums** page.



Create order minimums

Article • 2/26/2025 • 2 min read

You can create an order minimum record and set up the amount, quantity, and gross weight requirements for various sources, ensuring that sales and purchase orders meet these requirements.

The following procedure outlines how to create an order minimum record.

1. Select the Search icon , enter **Order Minimums**, and then choose the related link.
The **Order Minimums** page opens.
2. Select **New**.
A new order minimum record is created.
3. Enter the required information in the following fields:

Field	Description
Source Type	Select the type of source to which you want to apply the order minimum requirement. The available options are: • All Customers • Customer Attribute • Customer Price Group • Customer • All Vendors • Vendor Attribute • Vendor The <i>Customer Attribute</i> and <i>Vendor Attribute</i> values are visible only when the Aptean Advanced Attributes extension is installed.
Source No.	Select the customer or vendor number if you have selected <i>Customer</i> or <i>Vendor</i> in the Source Type field, respectively. If the Source Type field is set to <i>Customer Attribute</i> or <i>Vendor Attribute</i>, the system inherits the values in the Source No. field as set up on the Order Minimum Setup page. For more information, see Set up order minimums.
Source Name	Specifies the customer or vendor attribute name if the Source Type field is set to <i>Customer Attribute</i> or <i>Vendor Attribute</i>, respectively.
Attribute Value	Select the customer or vendor attribute value if the Source Type field is set to <i>Customer Attribute</i> or <i>Vendor Attribute</i>, respectively.



Source Address Code	Select the ship-to or order address if the Source Type field is set to <i>Customer Attribute</i> or <i>Vendor Attribute</i> .
Minimum Amount (LCY) (Base)	Enter the minimum amount requirement you want to apply.
Minimum Quantity (Base)	Enter the minimum quantity requirement you want to apply.
Minimum Gross Weight (Base)	Enter the minimum gross weight requirement you want to apply.
Mandatory	Select the checkbox if you want the order minimum requirements to be applied mandatorily. If you select the checkbox, the system displays an error when the sales or purchase order does not meet the order minimum requirement. If you clear the checkbox, the system displays a confirmation message to notify you that the sales or purchase order does not meet the order minimum requirement.
Start Date	Select or enter the start date for the order minimum record.
End Date	Select or enter the end date for the order minimum record.

The order minimum record is created.

Note

- For order minimum records with the **Source Type** field set to *Customer Attribute* or *Vendor Attribute* on the **Order Minimums** page,
- The system displays a confirmation message when changing the **Name** field on the **Vendor Attribute Values** or **Customer Attribute Values** page. In case of a change, the system updates the **Attribute Value** field value on the **Order Minimums** page.
- The system displays a confirmation message when deleting a vendor or customer attribute on the **Vendor Attribute** or **Customer Attribute** page. In case of deletion, the system deletes the lines using the vendor attribute or customer attribute on the **Order Minimums** page.
- The system displays a confirmation message when deleting a vendor or customer attribute value on the **Vendor Attribute Values** or **Customer Attribute Values** page. In case of deletion, the system deletes the lines using the vendor attribute value or customer attribute value on the **Order Minimums** page.



Define exclusions for order minimums

Article • 2/26/2025 • 1 min read

You can define exclusions for order minimums based on, for example, location, shipment method, order type, or specific customers and vendors. So, the order minimum rules do not apply to the defined exclusions.

The following procedure outlines how to define exclusions.

1. On the **Order Minimums** page, on the action bar, select **Exclusions**.
The **Filter Page** dialog opens.
2. You can add or edit exclusions as required.

Note

You can select exclusions for trade order types in the **Order Type Code** field and trade business groups in the **Trade Business Group** field when you have the Aptean [Trade Management](#) extension installed.

3. Select **OK**.
The system applies the exclusions to the page.

You can view the details of the exclusions in the **Excluded Values** section of the FactBox. For more information, see [View additional details on the FactBox](#).

Note

If you have defined exclusions for an order minimum record, you cannot change the **Source Type** or **Source No.** field value unless you remove the applied exclusions.



View additional details on the FactBox

Article • 2/26/2025 • 3 min read

You can view customer or vendor details related to the selected order minimum record on the FactBox of the **Order Minimums** page. Additionally, you can view details of any exclusions that have been defined for, for example, location, shipment method, order type, and specific customers and vendors.

You can view the following information in the **Customer Details** section of the FactBox.

Field	Description
Customer No.	Specifies the associated customer number. You can select the value to view the Customer Card page.
Name	Specifies the name of the associated customer.
Phone No.	Specifies the telephone number of the associated customer.
Email	Specifies the email address of the associated customer.
Fax No.	Specifies the fax number of the associated customer.
Credit Limit (LCY)	Specifies the maximum amount you allow the associated customer to exceed the payment balance before warnings are issued.
Available Credit (LCY)	Specifies the available credit associated with the customer. You can select the value to view the Available Credit page.
Payment Terms Code	Specifies the payment terms code you require for the associated customer.
Contact	Specifies the name of the person you regularly contact when you do business with the associated customer.

You can view the following information in the **Vendor Details** section of the FactBox.

Field	Description
Vendor No.	Specifies the associated vendor number. You can select the value to view the Vendor Card page.
Name	Specifies the name of the associated vendor.
Phone No.	Specifies the telephone number of the associated vendor.
Email	Specifies the email address of the associated vendor.
Fax No.	Specifies the fax number of the associated vendor.



Contact	Specifies the name of the person you regularly contact when you do business with the associated vendor.
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You can view the following information in the **Excluded Values** section of the FactBox.

Field	Description
Active Filter	Specifies whether any exclusion filters for the order minimum record exists.
No. of Customer Exclusion	Specifies the total number of customer exclusions associated with the order minimum record. You can select the value to view additional details.
No. of Vendor Exclusion	Specifies the total number of vendor exclusions associated with the order minimum record. You can select the value to view additional details.
No. of Location Exclusion	Specifies the total number of location exclusions associated with the order minimum record. You can select the value to view additional details.
No. of Shipment Method Exclusion	Specifies the total number of shipment method exclusions associated with the order minimum record. You can select the value to view additional details.
No. of Shipping Agent Exclusion	Specifies the total number of shipping exclusions associated with the order minimum record. You can select the value to view additional details.
No. of Order Type Exclusion	Specifies the total number of trade order type exclusions associated with the order minimum record. You can select the value to view additional details. This field is available only when the Aptean Trade Management extension is installed.
No. of Trade Business Group Exclusion	Specifies the total number of trade business group exclusions associated with the order minimum record. You can select the value to view additional details. This field is available only when the Aptean Trade Management extension is installed.



Manage sales and purchase orders

Article • 6/20/2025 • 1 min read

When working with sales and purchase orders that have amount, quantity, and gross weight requirements specified in order minimum records, the system validates the minimum requirements using the sum of the field values of the sales or purchase order lines, as follows:

- For the minimum amount, the system considers the **Line Amount Excl. VAT** field value.
- For the minimum quantity, the system considers the **Quantity (Base)** field value.
- For the minimum gross weight, the system considers the product of the **Quantity** and **Gross Weight** field values.

The system displays error or confirmation messages (based on the **Mandatory** checkbox value of the **Order Minimums** page) when releasing the order.

- If an error occurs, you can make the necessary changes to ensure that all the order minimum requirements are met and then release the order.
- If a confirmation message appears, you can choose to proceed with the order or make necessary changes to ensure that all the minimum order requirements are met and then release the order.

Note

- The system applies the appropriate minimum order requirement based on the defined hierarchy, ensuring that the most specific requirement is met.
- When minimum order requirements collide for a sales order, the system applies the following hierarchy: 1. Customer 2. Customer Attribute 3. Customer Price Group 4. All Customers
- When minimum order requirements collide for a purchase order, the system applies the following hierarchy: 1. Vendor 2. Vendor Attribute 3. All Vendors
- When order minimum records with both mandatory and non-mandatory requirements apply to a sales or a purchase order, the system prioritizes the mandatory order minimum requirements and displays error messages.
- The system does not apply minimum order requirements to purchase and sales orders that contain any one of the exclusions defined on the **Order Minimums** page. For more information, see [Define exclusions for order minimums](#). In such cases, the system does not display any confirmation or error message allowing the order to be released without restrictions.
- When releasing multiple sales or purchase orders from the list page, when the **Mandatory** checkbox is selected, the system displays a consolidated list of errors. If the **Mandatory** checkbox is cleared, the system does not display confirmation messages when the sales or purchase orders do not meet minimum order requirements.



View order minimum records

Article • 2/26/2025 • 2 min read

You can view order minimum records associated with a customer, ship-to address, vendor, or order address. Additionally, you can add, edit, or delete order minimum records.

View order minimums of a customer

The following procedure outlines how to view order minimum records associated with a customer.

1. Open the relevant **Customer Card** page.
2. On the action bar, select **Related** > **Customer** > **Order Minimums**.
The **Order Minimums** page opens with a list of the order minimum records associated with the customer.
You can add, edit, or delete order minimum records as required.

View order minimums of a ship-to address

The following procedure outlines how to view order minimum records associated with a ship-to address.

1. Open the relevant **Customer Card** page.
2. On the action bar, select **Related** > **Customer** > **Other** > **Ship-to Addresses**.
The **Ship-to Address List** page opens.
3. Select the relevant address line and then on the action bar, select **Related** > **Address** > **Order Minimums**.
The **Order Minimums** page opens with a list of the order minimum records associated with the ship-to address.
You can add, edit, or delete order minimum records as required.

Additionally, to view the order minimum records associated with a ship-to address from the **Ship-to Address** card page, select **Related** > **Address** > **Order Minimums**.

View order minimums of a vendor

The following procedure outlines how to view order minimum records associated with a vendor.

1. Open the relevant **Vendor Card** page.
2. On the action bar, select **Related** > **Vendor** > **Order Minimums**.
The **Order Minimums** page opens with a list of the order minimum records associated with the vendor.
You can add, edit, or delete order minimum records as required.



View order minimums of an order address

The following procedure outlines how to view order minimum records associated with an order address.

1. Open the relevant **Vendor Card** page.
2. On the action bar, select **Related > Vendor > Order Addresses**.
The **Order Address List** page opens.
3. Select the relevant address line and then on the action bar, select **Related > Address > Order Minimums**.
The **Order Minimums** page opens with a list of the order minimum records associated with the order address.
You can add, edit, or delete order minimum records as required.

Additionally, to view the order minimum records associated with an order address from the **Order Address** card page,

- Select **Related > Address > Order Minimums**.



Integrations

Article • 1/28/2026 • 1 min read

The Aptean Order Minimums extension has been integrated with the following extensions:

- [Aptean Advanced Attributes](#)
- [Aptean Trade Management](#)
- [Aptean E-Commerce](#)
- [Aptean Surcharges](#)



Aptean Advanced Attributes

Article • 2/26/2025 • 1 min read

When the Aptean Order Minimums extension is used in conjunction with the Aptean [Advanced Attributes](#) extension, you can apply minimum order requirements to customer and vendor attributes. For more information, see [Create order minimums](#).



Aptean Trade Management

Article • 2/26/2025 • 1 min read

When the Aptean Order Minimums extension is used in conjunction with the Aptean [Trade Management](#) extension, you can define exclusions for order minimums based on trade order types and trade business groups. For more information, see [Define exclusions for order minimums](#).



Aptean E-Commerce

Article • 7/2/2025 • 1 min read

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



Integration with Surcharges

Article • 1/28/2026 • 1 min read

When the Apteon Order Minimums extension is used in conjunction with the Apteon [Surcharges](#) extension, you can configure surcharges to be automatically applied when sales orders or purchase orders do not meet the required order minimum thresholds.

On the **Sales Surcharges** and **Purchase Surcharges** pages, you can set the **Surcharge Type** field value to *Order Minimum* to apply the surcharge in order minimum scenarios. When you select this option, most other fields become read-only because the system determines surcharge applicability through order minimum logic.

The **Surcharge No.** field on the **Order Minimums** page is visible only when the **Surcharge Type** field is set to *Order Minimum*. The field becomes non-editable when the **Mandatory** checkbox is selected.

When an order minimum setup uses a surcharge, the system inserts the surcharge line when you release the document after accepting the order minimum warning.

