

User Manual

Aptean Food and Beverage ERP

Document Publication

Product Documentation



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Release notes

Article • 7/22/2026 • 1 min read

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

Date	Release version	Description
June 2026	2603.0.0.0	Major release
June 2026	2602.2.0.0	Minor release
May 2026	2602.1.0.0	Minor release
April 2026	2602.0.0.0	Major release
January 2026	2601.0.0.0	Feature release
November 2025	2501.3.0.0	Platform release
September 2025	2501.2.0.0	Stability release
August 2025	2501.1.0.0	Stability release
March 2025	2501.0.0.0	Initial release



2603.0.0.0

Release Note • 7/22/2026 • 1 min read

##Enhancements/Modifications

With this release of the Apteian Document Publication extension, the system allows you to specify **CC** and **BCC** recipients when publishing documents by email. If the **CC** and/or **BCC** fields are populated, the system includes those recipients in the outgoing email when the document is published.

This extension has been updated to ensure interoperability with the recent changes in the Apteian Contract Management extension. To know more, see [What's new in Contract Management, version 2603.0.0.0](#).

Integrations

The Apteian Document Publication extension has been integrated with the Apteian [Contract Management](#) extension.

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

##UI/UX Changes:

The following UI/UX change has been made in this release.

- The **CC** and **BCC** fields have been added to the **Document Publication** page.



2602.2.0.0

Release Note • 6/24/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
370139, 367754	The system fails to apply the body text configured on the Reminder Level Communication page when sending reminder emails using the Publish action.



2602.1.0.0

Release Note • 5/27/2026 • 1 min read

Enhancements/Modifications

With this release of the Aptean Document Publication extension, the system allows you to publish reports directly from the **Transport Order** and **Posted Transport Order** pages using the **Publish** and **Publish Directly** actions. This enables transport planners to quickly email or print transport order documents to shipping agents without manually downloading reports.

Integrations

The Aptean Document Publication extension has been integrated with the Aptean [Transport](#) extension. For more information, see [Integrations](#).



2602.0.0.0

Release Note • 4/22/2026 • 1 min read

Features

With this release of the Aptean Document Publication extension, you can request document reports directly from the **My Account Dashboard** page in the e-commerce portal. The system generates and emails the reports using the configured custom category, layout, and request page parameters. For more information, see [Integrations](#).

Integrations

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



2601.0.0.0

Release Note • 1/28/2026 • 3 min read

Features

With the features added in this release of the Aptean Document Publication extension,

- The system supports the advanced pricing related price list report as a custom usage report. This feature allows you to configure the APR price list report as a custom publication source for customers, override layouts, and publish customer-specific advanced pricing price lists directly from the **Customers** and **Customer Card** pages or through the job queue using custom categories. For more information, see [Publish reports from documents](#) and [Supported documents](#).
- The system allows you to control job queue execution of custom usage reports by specifying a custom category on the **Publish Documents by Job Queue** page. This enables more precise scheduling and execution of publication reports, improving flexibility and operational control within Business Central. For more information, see [Schedule report publishing](#).
- You can define document filters for custom usage directly from the **Document Publication Report Selection** page by executing the **Document Filter** action. For more information, see [Apply document filters](#).
- You can define, save, and reuse report request page parameters directly from the **Document Publication Report Selection** page. This feature ensures consistent and accurate report execution without requiring you to re-enter parameters each time a report is published. For more information, see [Set up document publication reports](#).
- The system allows you to define the **Source Type** and **Source No.** field values related to specific customer or vendor when the **Usage** field value is set to *Custom* on the **Document Publication Layouts** page. For more information, see [Define document publication layouts](#).

UI/UX changes

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

- The **Publish** and **Publish Directly** actions have been added to the **Customers** and **Customer Card** pages.



 Note

These actions are visible only when the advanced pricing related price list report is configured on the **Document Publication Report Selection** page with the following field values:

- **Usage:** *Custom*
- **Source Type:** *Customer*
- **Report ID:** APR related report ID

- The **Document Filter** action has been made available for custom usage records on the **Document Publication Report Selection** page.
- The **Report Request** action has been added to the **Document Publication Report Selection** page.
- The **Custom Category** field has been added to the **Publish Documents by Job Queue** page.
- The **Source Type** and **Source No.** field values are editable on the **Document Publication Layouts** page when the **Usage** field value is set to *Custom*.

Resolved issues

The following issues have been resolved in this release.

ID	Description
278053	The system displays an unclear error message when the Publish or Directly Publish action are executed for a production order on the Released Production Order page. This issue occurs when the selected report does not generate any output based on the current filters or layout configuration.
276510	The system incorrectly allows to enter and save any value in the Source No. field on the Document Publication Layouts page when the Source Type field value is left blank. Additionally, the system fails to automatically clear the previously entered invalid Source No. field value when the Source Type field value is updated.
342065	The system incorrectly sends email to all customers when publishing a report, even though specific customer filters are applied on the Price List Request page and the <i>Use for Email Attachment</i> option is disabled. This issue occurs when the Price List Request page dialog is not shown.



2501.3.0.0

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

Enhancements/Modifications

With this release of the Aptean Document Publication extension, the following integration events have been added to the *ProcessMgt166FDW* codeunit to support custom logic during email and print processing in document publication flows.

- OnBeforeProcessViaEmail
- OnAfterProcessViaEmail
- OnBeforeProcessViaPrint
- OnAfterProcessViaPrint



2501.2.0.0

Release Note • 9/24/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
322771	The system fails to include custom document layout usages for vendors in the Usage field value on the Document Layouts page.



2501.1.0.0

Release Note • 8/27/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
315262	The system fails to update the Report Layout field value on the Document Publications dialog when publishing reports from a sales order after the Report Layout field value on the Document Publication Report Selection page is updated.



2501.0.0.0

Release Note • 3/19/2025 • 1 min read

Features

With this release of the Aptean Document Publication extension, you can:

- Set up reports to be sent using the document publication functionality. For more information, see [Set up document publication reports](#).
- Set up reports to be sent from sales or purchase documents for specific customers or vendors, respectively. For more information, see [Define document publication layouts](#).
- Define custom categories to extend the document publication functionality to pages that are not included in standard Business Central. For more information, see [Set up custom categories](#).
- Print or email reports from documents using the document publication functionality. For more information, see [Publish reports from documents](#).
- Print or email multiple reports manually. For more information, see [Publish multiple reports](#).
- Create batch to schedule report publishing per document type or for all document types. For more information, see [Schedule report publishing](#).



Introduction

Article • 3/19/2025 • 1 min read

The Aptean Document Publication (PUB) extension streamlines the process of mailing and printing reports of documents, such as sales orders and production orders to relevant recipients. Whether you're a sales agent sending order confirmations to customers, a supply chain manager notifying transport agents, or a purchase agent sharing updates with vendors, this extension simplifies your workflow and improves efficiency.

In the standard Business Central process, you must manually send reports from documents one-by-one, per document. With the Aptean Document Publication extension, you can send multiple reports simultaneously or schedule emailing or printing as a batch job. For example, as a sales agent you can send the pro-forma invoice, sales order confirmation, shipping and pick instructions, to the recipients with one click.

The key benefits of using this extension are:

- Streamline communication: Send multiple reports from documents simultaneously to internal and external recipients, saving time and ensuring consistency.
- Customize delivery methods: Email or print reports based on the preferences and requirements of each recipients.
- Boost efficiency: Reduce repetitive tasks and manual effort by automating report distribution with scheduled batch jobs.
- Minimize errors: Ensure accurate and consistent report distribution, reducing the risk of missing important communications.



Setup

Article • 3/19/2025 • 1 min read

The following setups are required.

- [Manage permission sets](#)
- [Set up custom categories](#)



Manage permission sets

Article • 3/19/2025 • 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 *DOCPUBLICATION166FDW*.

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 *DOCPUBLBASIC166FDW*.

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 the Aptean Document Publication extension, ensuring secure and role-based access.



Set up custom categories

Article • 3/19/2025 • 2 min read

You can define custom categories to extend the document publication functionality to pages that are not included in standard Business Central. For more information, see [Set up document publication reports](#) and [Define document publication layouts](#).

The following procedure outlines how to create a custom category.

1. Select the Search icon , enter **Custom Categories**, and then choose the related link.
The **Custom Categories** page opens.
2. On the action bar, select **New**.
A line is created.
3. In the **Code** field, enter a code to identify the custom category.
4. In the **Description** field, enter a text to describe the custom category.
The custom category is created.



Set up document publication reports

Article • 7/22/2026 • 3 min read

You can set up reports to be sent using the document publication functionality, as follows:

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

Field	Description
Usage	Select the type of document the report is used for. You can select <i>Custom</i> if you want to use custom categories to extend the document publication functionality to pages that are not included in standard Business Central. For more information, see Set up custom categories .
Report ID	Select the object ID of the report.
Report Name	Specifies the name of the report.
Output By	Select how the output of the report is used. The available options are: • Blank: The system prints the report when using the standard Business Central printing process. • <i>Document Publication</i>: The system prints or emails the report when using the document publication functionality. • <i>Both</i>: The system emails or prints the report when using the document publication functionality and the standard Business Central printing process.
Output Type	Select the output type you want the report to be sent in. The available options are: Blank, <i>Print</i> , and <i>Email</i> .
Custom Category Code	Select a custom category code. This field is editable only when the Usage field value is set to <i>Custom</i> .
Email Origin	Select which email address you want the system to use when sending the report via email. The available options are: • Blank • <i>Fixed</i>: The system uses the email address specified in the Email field. • <i>Document</i>: The system uses the email address specified in the header of the document.



	• <i>Contact</i>: The system uses the email address specified on the Contact Card page of the relevant customer or vendor card. • <i>Organizational Level</i>: The system uses the email address of all customers or vendors that are setup with the organizational level specified in the Organizational Level Code field.
Use for Email Body	Select the checkbox if you want the system to insert the summarized information, for example, invoice number, due date, and payment service link, to the body of the email. This checkbox is editable only when the Output Type field value is set to <i>Email</i>.
Use for Email Attachment	Select the checkbox if you want the system to attach the report to the email. This checkbox is editable only when the Output Type field value is set to <i>Email</i>.
Email	Enter the email ID you want the system to use when sending the report via email. This field is editable only when the Email field value is set to <i>Fixed</i>.
Organizational Level Code	Select the organizational level that the system must consider when sending emails to the associated customers or vendors. This field is editable only when the Email Origin field value is set to <i>Organizational Level</i>.
CC	Enter one or more email addresses to receive a copy (CC) of the email when the document is published. This field is editable only when the Email field is set to <i>Fixed</i>.
BCC	Enter the email ID that you want the system to use as the BCC recipient when sending the report via email. This field is editable only when the Email field value is set to <i>Fixed</i>.
No. of Output	Enter the number of outputs of the report you want the system to print or email. This field value is set to <i>1</i> by default.



Process By	Select how the system must process the report. The available options are: • Blank • <i>User</i>: You can manually publish the reports from documents using the document publication functionality. For more information, see Publish reports from documents. • <i>Job Queue</i>: You can manually publish multiple reports of a document type or create batch jobs for the system to automatically publish reports when running the batch jobs. For more information, see Publish multiple reports and Schedule report publishing.
Publish	Select the checkbox if you want the system to publish the report. This checkbox is selected by default when the Process By field value is selected.
Dialog	Select the checkbox if you want the system to display the Document Publication dialog to review and edit reports when publishing reports from documents. This checkbox is not editable when the Process By field value is set to <i>Job Queue</i>.
Document Filter Exists	Specifies whether a document filter is available for the report that can be used to filter the data in the report. For more information, see Apply document filters.

The record is set up.

Note

The advanced pricing related price list report is available for selection in the **Report ID** field on the **Document Publication Report Selection** page when the **Usage** field value is set to *Custom*.

Additionally, you can:

- Filter the **Document Publication Report Selection** page with the **Output By** and **Usage** filters on the header level.
- Execute the **Document Filter** action to apply filters to reports on the **Document Publication Report Selection** page based on, for example, location code, sell-to customer number, and shipping method code. For more information, see [Apply document filters](#).
- Execute the **Report Request Page** action to open the request page for the selected report to set the parameters and filters required. > [!NOTE]
> - When a report is executed using the **Publish** or **Publish Directly** action, or other publication flows, the system retrieves the stored parameters and pre-populates the request page automatically. > - This functionality supports advanced pricing related price list report.
- Set up which reports must be sent from sales or purchase documents for specific customers or vendors, respectively, on the **Document Publication Layouts** page. For more information, see [Define document](#)



[publication layouts.](#)



Define document publication layouts

Article • 7/22/2026 • 3 min read

You can define which reports must be sent from sales and purchase documents for specific customers or vendors, respectively, on the **Document Publication Layouts** page.

!

Note

- This page is not applicable to non-commercial documents like assembly orders, production orders, and transfer orders.
- You can copy the reports set up on the **Document Publication Report Selection** page.
- The system considers the changes made to the reports on the **Document Publication Layouts** page over the reports on the **Document Publication Report Selection** page when printing or emailing reports using the document publication functionality.

You can set up reports for a specific customer or vendor as follows:

1. Select the Search icon , enter **Document Publication Layouts**, and then choose the related link.
The **Document Publication Layouts** page opens.
2. You can select the following filters on the header level.

Filter	Description
Output By	Select how the output of the report is used. The available options are: • Blank: The system prints the report when using the standard Business Central printing process. • <i>Document Publication</i>: The system prints or emails the report when using the document publication functionality. • <i>Both</i>: The system emails or prints the report when using the document publication functionality and the standard Business Central printing process.
Source Type	Select the source type of the documents. The available options are: 18 (Customer) and 24 (Vendor).
Source No.	Select the number of the specific customer or vendor you want to apply the reports to.
Usage	Select the type of document the report is used for.
Custom Categories	Select a custom category code. This filter is editable only when the Usage field value is set to <i>Custom</i> .



 Note

- You can define the required **Source Type** and **Source No.** field values when the **Usage** field value is set to *Custom*.
- The system supports layout overrides for the advanced pricing price list report using the **Document Publication Layouts** page when the **Usage** field value is set to *Custom* and the **Source Type** field value is set to *Customer*.

3. On the action bar, select **Copy from Report Selection** to copy the reports that are set up on the **Document Publication Report Selection** page. For more information, see [Set up document publication reports](#). Additionally, you can select a new line to set up a report for a specific customer or vendor.
4. You can enter the required information in the following fields:

Field	Description
Source No.	Specifies the number of the specific customer or vendor the reports apply to.
Usage	Select the type of document the report is used for. The available options are: You can select <i>Custom</i> if you want to use custom categories to extend the document publication functionality to pages that are not included in standard Business Central. For more information, see Set up custom categories .
Report ID	Select the object ID of the report. Note: The system displays an error message if the selected Report ID field value whose source table does not match the Source Type field value.
Report Name	Specifies the name of the report.
Output By	Select how the output of the report is used. The available options are: • Blank: The system prints the report when using the standard Business Central printing process. • Document Publication: The system prints or emails the report when using the document publication functionality. • Both: The system emails or prints the report when using the document publication functionality and the standard Business Central printing process.
Output Type	Select the output type you want the report to be sent in. The available options are: <i>Blank</i> , <i>Print</i> , and <i>Email</i> .



Custom Category Code	Select a custom category code. This field is editable only when the Usage field value is set to <i>Custom</i>.
Use for Email Body	Select the checkbox if you want the system to insert the summarized information, for example, invoice number, due date, and payment service link, to the body of the email. This checkbox is editable only when the Output Type field value is set to <i>Email</i>.
Use for Email Attachment	Select the checkbox if you want the system to attach the report to the email. This checkbox is editable only when the Output Type field value is set to <i>Email</i>.
Email Origin	Select which email address you want the system to use when sending the report via email. The available options are: • Blank • <i>Fixed</i>: The system uses the email address specified in the Email field. • <i>Document</i>: The system uses the email address specified in the header of the document. • <i>Contact</i>: The system uses the email address specified on the Contact Card page of the relevant customer or vendor card. • <i>Organizational Level</i>: The system uses the email address of all customers or vendors that are setup with the organizational level specified in the Organizational Level Code field.
Email	Enter the email ID you want the system to use when sending the report via email. This field is editable only when the Email Origin field value is set to <i>Fixed</i>.
Organizational Level Code	Select the organizational level that the system must consider when sending emails to the associated customers or vendors. This field is editable only when the Email Origin field value is set to <i>Organizational Level</i>.
CC	Enter one or more email addresses to receive a copy (CC) of the email when the document is published. This field is editable only when the Email field is set to <i>Fixed</i>.
BCC	Enter the email ID that you want the system to use as the BCC recipient when sending the report via email. This field is editable only when the Email field value is set to <i>Fixed</i>.
No. of Output	Enter the number of outputs of the report you want the system to print or email. This field value is set to <i>1</i> by default.



Process By	Select how the system must process the report. The available options are: • Blank • <i>User</i>: You can manually publish the reports from documents using the document publication functionality. For more information, see Publish reports from documents. • <i>Job Queue</i>: You can manually publish multiple reports of a document type or create batch jobs for the system to automatically publish reports when running the batch jobs. For more information, see Publish multiple reports and Schedule report publishing.
Publish	Select the checkbox if you want the system to publish the report. This checkbox is selected by default when the Process By field value is selected.
Dialog	Select the checkbox if you want the system to display the report in the Document Publication dialog to review and edit it when publishing reports from documents. This checkbox is editable only when the Process By field value is set to <i>User</i>.
Document Filter Exists	Specifies whether a document filter is available for the report that can be used to filter the data in the report. For more information, see Apply document filters.

The reports are set up for a specific customer or vendor.

Additionally, you can select the **Document Filter** action to view, edit, and apply filters to reports based on, for example, location code, sell-to customer number, and shipping method code. For more information, see [Apply document filters](#).

You can open the **Document Publication Layouts** page for a specific vendor or customer from the following pages:

- **Customers and Customer** pages: On the action bar, select **Related > Customer > Document Publication Layouts**.
- **Vendors and Vendor** pages: On the action bar, select **Related > Vendor > Document Publication Layouts**.



Apply document filters

Article • 1/28/2026 • 1 min read

You can select the **Document Filter** action on the **Document Publication Report Selection** and the **Document Publication Layouts** pages to apply specific filters to a report, for example, location code, sell-to customer number, and shipping method code.

! Note

- The **Document Filter** action is available for report lines when the **Usage** field value is set to *Custom*. Additionally, when this configuration is done, the system supports APR related price list report for customer-specific document filters.
- The filters applied to the reports on the **Document Publication Report Selection** page are automatically copied when executing the **Copy from Report Selection** action on the **Document Publication Layouts** page.
- If filters are edited on the **Document Publication Layouts** page, the system considers the updated filters instead of the filters on the **Document Publication Report Selection** page.



Publish reports from documents

Article • 1/28/2026 • 1 min read

You can select the following actions to print or email reports from documents using the document publication functionality. For more information, see [Supported documents](#).

- **Publish:** The system opens the **Document Publications** dialog, where you can review and edit the reports to be published. You can select **OK** to proceed with the printing or emailing.
- **Publish Directly:** The system publishes the reports as per the setup.

Note

- These actions are displayed on the **Customers** and **Customer Card** pages or through the job queue when the advanced pricing related price list report is configured on the **Document Publication Report Selection** page with the following field values:
 - **Usage:** *Custom*
 - **Source Type:** *Customer*
 - **Report ID:** APR related report ID
- The system publishes reports with the **Process By** field set to *User* on the **Document Publication Report Selection** or the **Document Publication Layouts** page.
- For sales and purchase documents, the system checks each report by report ID, first on the **Document Publication Layouts** page and then on the **Document Publication Report Selection** page.
- If the **Publish** checkbox is cleared for a report on the **Document Publication Report Selection** or the **Document Publication Layouts** page, the system does not display the report in the **Document Publications** dialog.



Publish multiple reports

Article • 3/19/2025 • 1 min read

You can select the **Publish** action on the Role Center to print or email all reports per document type or for all document types.

Note

The **Publish** action is visible only when the **Role** field value is set to *Document Publication* on the **My Settings** page.

To publish multiple reports, follow these steps:

1. On the Role Center, select the **Publish** action.

The **Publish Documents by Job Queue** page opens.

2. In the **Usage** field, select the type of document for which the system must publish the reports.

If you select blank, the system publishes reports of all document types.

3. Select **OK**.

The system publishes the reports.

Alternatively, you can select **Schedule** to create a batch job and schedule the report publishing. For more information, see [Schedule report publishing](#).

Note

- The system publishes reports with the **Process By** field set to *Job Queue* on the **Document Publication Report Selection** or the **Document Publication Layouts** page.
- For sales and purchase documents, the system checks each report by report ID, first on the **Document Publication Layouts** page and then on the **Document Publication Report Selection** page.



Schedule report publishing

Article • 1/28/2026 • 2 min read

You can use batch jobs to schedule report publishing per document type or for all document types on the **Job Queue Entries** page.

The system automatically creates a batch job for report publishing when the **Document Publication Report Selection** and **Document Publication Layouts** pages are opened for the first time. The **Status** field value for these job queues are set to *On Hold*. You can access them via the **Job Queue Entries** page and edit them as required to schedule report publishing. For more information, see [Use job queues to schedule tasks](#).

Alternatively, you can manually create job queue entries to schedule report publishing for a document type on the **Job Queue Entries** page.

To schedule report publishing, follow these steps:

1. On the **Job Queue Entries** page, on the **General** FastTab, set the **Object Type to Run** field value to *Report*.
2. Set the **Object ID to Run** field value to 70219338.
3. Perform the rest of the job queue setup. For more information, see [Use job queues to schedule tasks](#).
4. On the action bar, select **Job Queue > Report Request Page**.
The **Publish Document by Job Queue** dialog opens.
5. In the **Usage** field, select the type of document you want the system to publish reports for.
If you select blank, the system publishes reports of all document types.
6. In the **Custom Category** field, select the required category.

Note

This field is editable only when the **Usage** field value is set to *Custom* on the **Job Queue Entries** page. Additionally, the system filters report selections based on the selected **Custom Category** field value.

7. Select **OK**.

The job queue entry is set up.

Note

- When the job queue entry is run, all the reports with the **Process By** field value set to *Job Queue* on the **Document Publication Report Selection** page for the specific document type is published accordingly.
- For sales and purchase documents, the system checks each report by report ID, first on the **Document Publication Layouts** page and then on the **Document Publication Report Selection** page.



Supported documents

Article • 5/27/2026 • 1 min read

You can execute the **Publish** and **Publish Directly** actions to print or email reports using the document publication functionality on the following pages:

- Assembly Order
- Assembly Orders
- Blanket Purchase Order
- Blanket Purchase Orders
- Blanket Sales Order
- Blanket Sales Orders
- Customers
- Customer Card
- Inventory Receipt
- Inventory Receipts
- Inventory Shipment
- Inventory Shipments
- Issued Reminder
- Issued Reminders
- Posted Assembly Order
- Posted Assembly Orders
- Posted Invt. Receipt
- Posted Invt. Receipts
- Posted Invt. Shipment
- Posted Invt. Shipments
- Posted Purchase Credit Memo
- Posted Purchase Credit Memos
- Posted Purchase Invoice
- Posted Purchase Invoices
- Posted Purchase Receipt
- Posted Purchase Receipts
- Posted Return Receipt
- Posted Purchase Return Shipments
- Posted Return Shipment



- Posted Sales Credit Memo
- Posted Sales Credit Memos
- Posted Sales Invoice
- Posted Sales Invoices
- Posted Sales Shipment
- Posted Sales Shipments
- Posted Transfer Receipt
- Posted Transfer Receipts
- Posted Transfer Shipment
- Posted Transfer Shipments
- Posted Transport Order
- Posted Transport Orders
- Released Production Order
- Production Order List
- Posted Purchase Credit Memos
- Purchase Order
- Purchase Orders
- Purchase Quote
- Purchase Quotes
- Purchase Return Order
- Purchase Return Orders
- Sale Invoice
- Sales Invoices
- Sales Order
- Sales Orders
- Sales Quote
- Sales Quotes
- Sales Return Order
- Sales Return Orders
- Transfer Order
- Transfer Orders
- Transport Order
- Transport Orders



Integrations

Article • 5/27/2026 • 1 min read

The Aptean Document Publication extension has been integrated with the following extensions:

- [Aptean E-Commerce](#)
- [Aptean Transport](#)
- [Aptean Contract Management](#)



Aptean E-Commerce

Article • 4/22/2026 • 2 min read

When the Aptean Document Publication extension is used with the Aptean [E-Commerce](#) extension, e-commerce customers can request document reports directly from the **My Account Dashboard** page in the e-commerce portal. The reports available to each customer are filtered by the Document Publication custom category configured in the Aptean [E-Commerce](#) extension setup. When a customer requests a report, the Aptean Document Publication extension generates the report using the configured layout and request page parameters, applies the customer filter automatically, and delivers the PDF to the customer's registered email address.

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

1. Configure the reports on the **Document Publication Report Selection** page with the **Usage** field value set to *Custom* and assign a **Custom Category** field value. To know more, see [Set up document publication reports](#).
2. Assign the same custom category code in the **Document Publication Custom Category Code** field on the **E-commerce Setup** page in the Aptean [E-Commerce](#) extension.

! Note

A report is visible to an e-commerce customer only when the **Source Type** field value on the **Document Publication Report Selection** page is set to *Customer* and the **Source No.** field value matches the customer number, or when both fields are left blank so the report applies to all customers. The customer context is applied automatically when the report is generated.



Aptean Transport

Article • 5/27/2026 • 1 min read

When the Aptean Document Publication extension is used in conjunction with the Aptean [Transport](#) extension, the system allows you to publish reports directly from the **Transport Order** and **Posted Transport Order** pages using the **Publish** and **Publish Directly** actions. This enables transport planners to quickly email or print transport order documents to shipping agents without manually downloading reports.

To make reports available from transport order documents, follow these steps:

1. Configure the reports on the **Document Publication Report Selection** page with the **Usage** field value set to *Custom* and assign a **Custom Category** field value. For more information, see [Set up document publication reports](#).
2. Assign the matching custom category codes in the **Transport Order Custom Category Code** and **Posted Transport Order Custom Category Code** fields on the **Transport Setup** page in the Aptean [Transport](#) extension.



Aptean Contract Management

Article • 7/22/2026 • 1 min read

When the Aptean Document Publication extension is used in conjunction with the Aptean [Contract Management](#) extension, the system allows you to publish reports directly from the **Sales Contract**, **Purchase Contract**, **Sales Contracts**, and **Purchase Contracts** pages using the **Publish** and **Publish Directly** actions. This enables users to quickly email or print sales and purchase contract documents without manually downloading reports.

To make reports available from contract documents, follow these steps:

1. Configure the reports on the **Document Publication Report Selection** page with the **Usage** field value set to *Custom* and assign a **Custom Category** field value. For more information, see [Set up document publication reports](#).
2. Assign the matching custom category codes in the **Sales Contract Custom Category Code** and **Purchase Contract Custom Category Code** fields on the **Contract Setup** page in the Aptean [Contract Management](#) extension.

