

User Manual

Aptean Food and Beverage ERP

Sales-Purchase Conditions for Drink-IT

Product Documentation



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Release notes

Article • 6/24/2026 • 2 min read

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

Date	Release version	Description
June 2026	2602.2.0.0	Minor release
May 2026	2602.1.0.0	Minor release
April 2026	2602.0.0.0	Major release
March 2026	2601.3.0.0	Stability release
February 2026	2601.2.0.0	Stability release
January 2026	2601.1.0.0	Stability release
January 2026	2601.0.0.0	Feature release
November 2025	2507.1.0.0	Stability release
October 2025	2507.0.0.0	Feature release
September 2025	2506.0.0.0	Feature release
August 2025	2505.1.0.0	Stability release
August 2025	2505.0.0.0	Feature release
July 2025	2504.0.0.0	Feature release
July 2025	2503.1.0.0	Platform release
July 2025	2503.0.0.0	Feature release
July 2025	2502.5.0.0	Stability release
June 2025	2502.4.0.0	Stability release
June 2025	2502.3.0.0	Stability release
May 2025	2502.2.0.0	Stability release
May 2025	2502.1.0.0	Stability release



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April 2025	2502.0.0.0	Feature release
April 2025	2501.2.0.0	Stability release
April 2025	2501.1.0.0	Stability release
March 2025	2501.0.0.0	Feature release
March 2025	2405.7.0.0	Stability release
February 2025	2405.6.0.0	Stability release
February 2025	2405.5.0.0	Stability release
February 2025	2405.4.0.0	Stability release
February 2025	2405.3.0.0	Stability release
January 2025	2405.2.0.0	Stability release
January 2025	2405.1.0.0	Stability release
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July 2024	2403.2.0.0	Stability release
July 2024	2403.1.0.0	Stability release
July 2024	2403.0.0.0	Feature release
June 2024	2402.0.0.0	Feature release
June 2024	2401.3.0.0	Stability release
May 2024	2401.2.0.0	Stability release
April 2024	2401.1.0.0	Stability release
April 2024	2401.0.0.0	Feature release
March 2024	2312.1.0.0	Stability release
December 2023	2312.0.0.0	Feature release
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January 2023	20.202301.0.0	Feature release
November 2022	20.202211.0.0	Feature release
September 2022	20.202209.0.0	Feature release
July 2022	20.202207.0.0	Feature release
May 2022	20.202205.0.0	Feature release
November 2021	18.202111.0.0	Feature release



2602.2.0.0

Release Note • 6/24/2026 • 3 min read

Enhancements/Modifications

With this release of the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition, you can prevent users from changing the description on the **Create Settlement Document** request page. The **Prevent Description Changes** field on the **Sales and Purchase Condition Setup** page controls whether the **Description** field is editable when **By Period Date** is active. When **Prevent Description Changes** toggle is turned on, the **Description** field is visible but non-editable (grayed out), ensuring the auto-generated period description is used for each period group. When disabled (the default), the **Description** field remains editable, preserving existing behavior.

UI/UX changes

The **Prevent Description Changes** field has been added to the **Sales and Purchase Condition Setup** page

Resolved issues

The following issues have been resolved in this release.

ID	Description
311878	The system fails to apply max deals per source type member when the Based on Condition Cust/Vend toggle is turned off. Customers or vendors with the same Condition Customer/Vendor No. incorrectly share the same deal limit instead of each having a separate one.
361300	The system fails to prevent users from overwriting the auto-generated period description on the Create Settlement Document request page, causing all settlement document comment lines to receive the same incorrect period description when the By Period Date option is enabled and multiple periods are processed.
370815	The system fails to close the Get Mix & Match Promotion Lines page after filling in the Qty. to Handle field when the Calc. Inv. Discount toggle is turned on in the Sales & Receivables Setup page and an invoice discount exists for the customer, causing the screen to freeze and the UI to become unresponsive.
372151	The system fails to apply SPC condition rules to Indirect Sales Entries when generating accruals, because the condition validity check uses the Posting Date of the accrual journal instead of the Document Date of the underlying Indirect Sales Entry, causing conditions to fail when the Posting Date falls outside the condition rule's validity window even though the Document Date falls within it.



373973	The system fails to apply condition rules correctly in two scenarios: the system applies the generic rate line instead of the item-specific rate line when a condition rule has both a rate line for a specific item number and a generic rate line for the same price unit of measure; and the system does not save the change to the Status field when a user changes a condition rule's status from <i>Certified</i> to <i>Under Development</i> on the Rule Card page, causing the condition rule to remain active when releasing sales orders.
362598	The system fails to display the rate minimum quantity and actual quantity on settlement document lines when a condition rule has the Calculate Minimum Type field set to <i>Over</i> or <i>Under</i> , preventing customers from seeing the full quantity breakdown on the settlement document.



2602.1.0.0

Release Note • 5/27/2026 • 3 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
371333	The system fails to calculate SPC discounts on sales orders when a condition rule has the Based on Condition Customer toggle turned on. Additionally, the system does not display an error message when the discount calculation fails, causing the failure to go undetected.
372273	The system displays two tables with the same condition rate caption in reporting tools such as Jet Reports, causing confusion and potential reporting errors. This issue occurs because an obsolete table shares its caption with the active condition rate table.
372872	The system fails to apply the configured dimension priority when creating a sales credit memo through the Condition Settlement Journal page. This issue occurs when the dimension priority is configured to favour customer dimensions over item dimensions, causing item dimensions to incorrectly take priority over customer dimensions in the resulting journal entries.
351785	The system fails to correctly evaluate the condition settlement journal when a condition rule with the Based on Items field value set to <i>Same Item Type</i> has multiple rates with the same minimum unit of measure but different price units of measure. The system mixes quantities across all price unit of measure groups when validating minimum quantities, causing incorrect suggestion status on settlement lines. Additionally, the system incorrectly assigns the unit of measure and price from the first rate to settlement lines that belong to other rates.
341663	The system fails to round up the best condition quantity when the Rounding Method Type field value is set to <i>Up</i> on a sales-purchase condition rule and another rule with a value in the Max Deals field exists.
340170	The system does not generate condition periodic settlement journal lines for all unit of measure rates defined in an SPC rule when the rule contains multiple unit of measure entries.
307760	The system fails to apply consistent rounding to SPC condition line amounts, resulting in a discrepancy between the value stored in the database and the value displayed on the page.
335009	The system fails to correctly update the Status and Unit Price field values when executing the Suggest Settlement Lines action in the condition periodic settlement journal line for sales and purchase conditions rules with a Position Level field value of <i>0</i> .



297265	The system fails to update the Condition Amount field value in the indirect sales journal for rules with the Based on Source Type field value set to <i>Customer Delivery-by</i> when executing the Calculate Condition Lines action with the Use Rule Filter Sets toggle turned on and the Use Rule Filter Sets Buffers toggle turned off in the sales and purchase condition setup.
364250	The system fails to correctly prioritize SPC condition rules based on the specificity of the Based Source Type and Based Item Type field values under the <i>Once by Priority</i> application policy. When two rules share the same position level, the system selects a less-specific based-on rule — such as a rule scoped to a customer classification or customer group — over a more-specific rule scoped to a specific customer or vendor.
340169	The system fails to include deposit and tax amounts in the unit price when suggesting periodic settlement rules where the Calculate on Deposit or Calculate on Tax field is set to <i>Add up</i> or <i>Subtract</i> on the Sales and Purchase Condition Rule Card page.



2602.0.0.0

Release Note • 4/22/2026 • 1 min read

Features

With the feature added in this release of the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition, the system correctly calculates sales and purchase conditions rules that include mix and match items when you allow previously excluded items for a customer on the **Customer Card** page. When you execute the **Calculate Drink-IT Lines** action on the **Sales Order** page, the system reads the customer's current allowed items configuration and displays mix and match suggestions accordingly.

Resolved issues

The following issue has been resolved in this release.

ID	Description
238713	An error occurs when a user with a non-default language opens pages that use internal filter views on the Promotion Item Mix & Match Selection page.



2601.3.0.0

Release Note • 3/25/2026 • 1 min read

Enhancements/Modifications

With this release of the Apteau Beverage Sales-Purchase Conditions extension, Drink-IT Edition, the system correctly calculates sales and purchase conditions rules that include mix & match items when previously excluded items are later allowed on the **Customer Card** page. When you run the **Calculate Drink-IT Lines** action on a sales order page, the system shows mix & match suggestions based on the customer's current allowed items configuration.



2601.2.0.0

Release Note • 2/25/2026 • 3 min read

Enhancements/Modifications

With this release of the Apteau Beverage Sales-Purchase Conditions 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.
- The existing **No. Of Rule Instances** numeric field in the sales and purchase condition rules has been replaced with the **Ordered Rule Instances** field featuring a simplified **Yes/No** toggle. This enhancement addresses the issue reported in bug ID #325379.

Resolved issues

The following issues have been resolved in this release.

ID	Description
347885	The system fails to update the Shipment Date field value in the sales line when changing the Shipment Date field value from the Route Planning Worksheet page.
357415	The system fails to update the Shipment Date field value on the sales header when changing the Route and Shipment Date field values. Additionally, the system does not update the corresponding fields on the sales lines.
333827	An error occurs on the Sales Order page when updating the Reason Code field value if the order is associated with a warehouse shipment.
348988	The system restricts to update rates when executing the Edit in Excel action on the Sales and Purchase Condition Rules page. Additionally, the system displays incorrect rate values associated with the rules.
341791	The system fails to calculate and update the unit prices in the Description field on the Sales Credit Memo page when executing the Create Settlement Document action on the Condition Periodic Settlement page after updating the Reason Code Groups field value on the Sales and Purchase Condition Rules page.
323624	An error occurs when attempting to modify the Shipment Method Code field value on the Sales Order page that has an associated warehouse shipment document.
348473	An error occurs when executing the Add Used License Plates action on the Warehouse Shipment page, preventing proper license plate integration into shipment processing.



347877	The system fails to calculate the discount pricing when using the Return Entry action to create negative quantity lines on the Sales Order page. The system does not apply the available discount that corresponds to the original positive quantity line. Instead, the system applies an inferior discount, resulting in incorrect pricing for the return transaction.
325379	The system fails to automatically update the Ordered Rule Instances field status (Yes or No) on the Sales and Purchase Condition Rules List page when a sales order page is created with an associated condition rule.



2601.1.0.0

Release Note • 1/28/2026 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
328374	The system incorrectly creates a sales credit memo for a loan and links the applies-to ID to a loan pay out capital customer ledger entry instead of the correct loan pay back capital entry during periodic settlement. As a result, the settlement document is applied to the wrong loan entry.
344485	The system incorrectly processes lines on the Condition Ledger Entries (Sales and Purchase) page with the Quantity (Base) field value set to 0, creating zero-quantity entries . This issue occurs because the system fails to validate whether the posting buffer line is empty before processing.
328375	The system incorrectly creates an additional entry on the Condition Ledger Entry page with all the field values left blank. This issue occurs even though the Quantity (Base) , Invoiced Quantity (Base) , Amount , and Discount field values are defined on the related Sales Credit Memo page posted from the Condition Periodic Settlement page.



2601.0.0.0

Release Note • 1/28/2026 • 1 min read

Features

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

- The Aptean [Feature Control](#) extension allows you to enable or disable the Aptean Beverage Sales-Purchase Conditions 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 Sales-Purchase Conditions 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.
- When you open the condition periodic settlement journal, the system directly opens the related condition settlement document instead of opening the whole list of documents.

Resolved issues

The following issue has been resolved in this release.

ID	Description
330988	An error occurs when creating a new company via the Create New Company wizard using the <i>Production – Setup Data Only</i> option.



2507.1.0.0

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

Enhancements/Modifications

This extension has been updated to support test scenarios and ensure compatibility with previous releases.

Resolved issues

The following issues have been resolved in this release.

ID	Description
333376	The system incorrectly recalculates the line amount and unit price in the sales order. Upon reopening and releasing the sales order, the discount values are changed instead of retaining the correct amounts, resulting in incorrect discount values.
318216	The system incorrectly applies the maximum deals sales and purchase condition rule with a lower price in the sales order instead of selecting the rule with the best price, leading to an incorrect discount calculation.
329554	The system incorrectly applies multiple discounts to a single sales line instead of selecting only the appropriate discount. Additionally, the system creates incorrect or blank sales order lines when the Rounding Method Type (Quantity) field value is set to <i>Up</i> or left blank on the Sales and Purchase Condition Rule Card page.
328129	The system incorrectly updates the Posting No. Series and No. Series field values on the Sales Credit Memo page from the Sales and Receivables Setup page instead of the Sales and Purchase Condition Setup page.



2507.0.0.0

Release Note • 10/22/2025 • 2 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
328200	The system fails to post a warehouse receipt for a purchase order that includes promotion items with the <i>Per Document</i> item type assigned to a sales and purchase condition rule.
328199	The system displays outdated condition rules on the Customer Card page when the Use Rule Filter Sets toggle on the Sales and Purchase Condition Setup page is turned on. Even though the ending date of a rule has already passed, the rule continues to appear in the sales and purchase condition rule list.
328183	The system incorrectly updates the Reason Code field value on the Sales Return Order page for promotion items. Additionally, an error occurs when tax rules are not defined for the sales and purchase condition-based reason codes.
333568	The system incorrectly deletes the empty goods and tax lines from sales orders when the Condition Customer Date Type field value is set to <i>Shipment Date</i> on the Customer Card page. This issue occurs after updating the shipment date on a released sales order. As a result, both empty goods lines in warehouse locations and tax lines in non-warehouse and warehouse locations are deleted.
259110, 316382, 313588, 313587	The system incorrectly calculates the net percentage discount amount on the Condition Periodic Settlement Journals page when the Minimum Amount or Minimum Quantity field value exist on the Sales and Purchase Condition Rule Card page.
297255	The system fails to calculate the <i>Net %</i> calculation method type rules in a sales order when the <i>Tiered (Over)</i> calculation minimum type rule exists with a lower position level. If the <i>Net %</i> rule has a higher position level than the <i>Tiered (Over)</i> rule, the system skips applying the net % discount during sales order processing.



315106	The system displays incorrect values in the Unit Price and Amount fields on the Condition Journals page. This issue arises when a discount amount is applied twice.
317796	The system incorrectly displays blocked items on the Promotion Item Mix & Match Selection (Sales and Purchase) page associated with a sales order.



2506.0.0.0

Release Note • 9/24/2025 • 3 min read

Features

With the features added in this release of the Apteau Beverage Sales-Purchase Conditions extension, Drink-IT Edition,

- You can configure the system to split VAT lines on the **Sales and Purchase Condition Calculations** page by selecting the **Calculation on VAT Lines** checkbox. The **Calculate on Tax** and **Calculate on Deposit** field values on the **Sales and Purchase Condition Rule Card** page determine whether discounts or charges are applied to tax or deposit amounts.
- The system has been enhanced to improve the performance of customer price calculations.

UI/UX changes

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

- The **Calculation on VAT Lines** field has been added to the **Sales and Purchase Condition Rule Card** page.
- The **Calculation on VAT Lines** checkbox has been added to the **Sales and Purchase Condition Calculations** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
316146	The system fails to apply the correct discount on the Sales and Purchase Conditions Rules page when the Application Policy field value is set to <i>Once by priority</i> for multiple discount rules associated with multiple calculation codes.
315105	The system incorrectly creates condition ledger entries with the quantity field values set as 0 for partial sales shipments on the Condition Ledger Entries (Sales and Purchase) page when executing the Post action with the <i>Ship & Invoice</i> option selected on the Sales Order page. This issue arises after executing the Find entries action on the Posted Sales Shipment page and the Related Entries field value is set to <i>Condition Ledger Entry</i> on the Find entries page.
327816	A performance issue occurs because the system recalculates dimensions excessively when creating a sales order for a customer with a conditional customer type and applying changes on the Order Entry

	page.
300834	An error occurs when executing the Item Rules Overview action on the Item Card page.
298105	An error occurs when calculating promotion-free items by executing the Calculate Drink-it Lines action in sales and purchase return orders.
319982	An error occurs when executing the Calculate Drink-it Lines or Release action after using the Get Recurring Sales Lines action on the Sales Order page.
300891, 321938, 315104	The system incorrectly calculates settlement periods for sales and purchase conditions when the Use Calendar Period checkbox is cleared on the Sales and Purchase Condition Calculations page.
324658	An error occurs when attempting to post a partial warehouse receipt for a purchase order linked with the sales and purchase condition rules.
324504	An error occurs when attempting to create a warehouse receipt by executing the Create Warehouse Receipt action on the Purchase Order page.



2505.1.0.0

Release Note • 8/29/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
311192	An error occurs when executing the Apply Changes action on the Return Entry page associated with a sales order. This issue arises when the warehouse shipment linked to the sales order contains promotion free and mix items.

Note

This issue occurs only when the Apteau Beverage [Empty Goods and Deposit Management](#) and the Apteau Beverage [Foundation Management](#) extensions, Drink-IT Edition are installed.



2505.0.0.0

Release Note • 8/27/2025 • 3 min read

Features

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

- Translations from the **Sales and Purchase Condition Calculations** page are automatically inherited by the **Sales and Purchase Condition Rule Card** page when you update the **Calculation Code** field value.
 - If the rule already contains translations, the system displays a confirmation message before making any changes. This message appears only when existing translations are present.
 - If no translations exist in the rule, the system automatically updates the translations on the **Sales and Purchase Condition Rule Card** page. You can also manually copy translations from calculation codes to rules by executing the **Copy Calculation Translation** action on the **Sales and Purchase Condition Rule Card** page. Ensure that the **Copy Translations Calculation to Rule Setup** toggle on the **Sales and Purchase Condition Setup** page is turned on and the **Copy Translations to Rule** checkbox on the **Sales and Purchase Condition Calculations** page is selected.
- The system determines dimensions for settlement document accrual reversals and postings based on the initial condition ledger entries on the **Create Settlement Documents** page. When the **By Customer/Vendor** toggle is turned on, the system utilizes dimensions from the original condition ledger entries, ensuring alignment with the original sales accruals.

This enhancement ensures that periodic discount settlements and their accrual reversals accurately reflect the intended dimensions.
- The system assigns dimensions to mix & match promotion lines the same way it does for manually added sales order lines. This enhancement standardizes dimension handling for both manual and promotional lines across all sales lines. Additionally, the **Disable Dimension Update during Calculation** toggle on the **Sales and Purchase Condition Setup** page ensures better performance when it is turned off. This enhancement addresses the issue reported in bug ID #303985.

Resolved issues

The following issues have been resolved in this release.

ID	Description
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306434	An error occurs when adding more than one rate line using the Edit List action on the Sales and Purchase Condition Rules page. This issue arises when the Feature Status field value is set to <i>Enabled</i> on the Feature Control page.
303985	The system does not populate the dimensions for mix & match items when they are added to a sales order. This issue occurs when the Disable Dimension Update during Calculation toggle on the Sales and Purchase Condition Setup page is turned on.
276208	The system fails to calculate the sales and purchase condition rules for purchase orders that include vendors with the <i>Include</i> rule type for vendor classification. The system fails to apply a sales and purchase condition rule to order lines specifically when the rule exists for a vendor classification code and a purchase order is created for a vendor within that classification. This issue also occurs in sales orders for customers, where the system fails to calculate the sales and purchase condition rules.
276209	The system incorrectly applies sales and purchase condition rules to purchase order lines when a rule exists for certain vendors, and a purchase order is created for a vendor not associated with that rule. This issue occurs when the Use Rule Filter Sets and Use Rule Filter Sets Buffer toggles on the Sales and Purchase Condition Setup page are turned on.
299224	An error occurs when attempting to update the Shipment Date or Route field value on sales orders containing promotion free items. This issue arises after a warehouse shipment has been created for the order. Additionally, the same issue occurs on the Route Planning Worksheet page.



2504.0.0.0

Release Note • 7/30/2025 • 2 min read

Features

With the features added in this release of the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition, the maximum deal functionality has been extended to support configuration at the sales and purchase condition rule level. This allows you to define maximum deal limits across multiple rate lines under a single rule.

- During sales order processing, the system applies the maximum quantity limits defined at the rule level.
- If the quantity exceeds the allowed limit, the system applies the promotion or pricing benefit only up to the defined maximum. It does not generate additional promotional lines beyond this limit.
- When multiple rate lines are valid, the system will handle rate per rate line.
- When the **Price Calculation Method Type** field value is set to *Best Condition (Highest)* on the **Sales and Purchase Condition Calculations** page, the system selects the rule that offers the lowest price or highest discount, while applying the defined maximum quantity limits.

UI/UX changes

The **Maximum Quantity Deal (per Source Member)**, **Maximum Quantity Deal** fields, and **Max. Deal per Rate List** toggle have been added to the **Sales and Purchase Condition Rule Card** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
301009	The system fails to calculate periodic rules for sales lines that are related to promotion rules (free items) on sales orders. This issue occurs when the sales and purchase promotion rules exist with the Item Type field value set as <i>Item</i> or <i>Per Document</i> on the Sales and Purchase Condition Rules page.
297264	The system incorrectly applies condition rules to items on a sales order when the condition rate line and the special price setup for the item use a unit of measure different from the base unit of measure, even though the Calculation on Special Price Type field value is set to <i>No</i> on the Sales and Purchase Condition Calculations page. This issue only occurs when the <i>New sales pricing experience</i> feature is enabled on the Feature Management page.



301010	The system incorrectly duplicates periodic condition lines for promotion mix items when the Shipment Date field value is updated multiple times on a sales order.
307918	The system fails to create condition lines for a sales order when the order is reopened and then released. This issue occurs only when periodic rules are used.



2503.1.0.0

Release Note • 7/30/2025 • 1 min read

Enhancements/Modifications

With this release of the Apteau Beverage Sales-Purchase Conditions extension, the *NoSeriesManagement* codeunit has been replaced with the standard *No. Series* codeunit on the *Whse.-Post Packages*, *Carrier Detail*, *Package Carton*, *Package Header*, *Shipping Batch* and *bcPacknShip Setup* tables to ensure compatibility with Business Central, version 27.



2503.0.0.0

Release Note • 7/2/2025 • 4 min read

Features

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

- The following improvements have been made to enhance the flexibility of sales and purchase condition rule calculations, particularly when condition rules are managed centrally at a customer or vendor group level.
 - You can use the **Based on Condition Customer/Vendor No.** toggle on the **Sales and Purchase Condition Rule Card** page to control whether the system should evaluate and settle condition rules using the **Condition Customer No.** or **Condition Vendor No.** field values specified on the **Customer Card** or **Vendor Card** page. This helps you when rules are maintained at a group or headquarters level but applied to individual entities.
 - If the **Based on Source Type** field value is set to *Member*, the **Based on Condition Customer/Vendor No.** toggle is turned on by default. For all other values in the **Based on Source Type** field, the toggle is turned off (and editable). This enhancement applies to both periodic and non-periodic (on-invoice) condition rules.
- You can use the *Period* option in the **Calculation Period Type** field on the **Sales and Purchase Condition Calculations** page to define calculation periods based on predefined accounting periods from the **Accounting Periods** page.
 - The **Suggest Settlement Lines** action on the **Condition Periodic Settlement Journals** page calculates the settlement lines as follows:
 - The **Starting Date** and **Ending Date** field values are determined based on each accounting period line.
 - The **Ending Date** field value is automatically calculated as one day before the start of the next accounting period.
 - The system processes each accounting period individually when calculating periodic settlements within the provided date range.
 - The **Use Calendar Period** checkbox is automatically cleared and is non-editable when the *Period* option is selected on the **Sales and Purchase Condition Calculations** page.
 - Journal lines are generated only for condition ledger entries that fall within the calculated accounting period range.
- You can use the **Description** field on the **Create Settlement Documents** page to define or customize the description that appears on the lines of the generated settlement documents. The field value is prefilled with the first description from the related settlement document. You can manually edit the description before document creation.



- When you create settlement documents using the **Create Settlement Documents** action from the **Condition Periodic Settlement Journals** page, the system allows you to include additional fields, such as line descriptions, VAT posting groups, and transaction source types which are automatically added to the generated documents, including sales invoices and purchase invoices.

Resolved issues

The following issues have been resolved in this release.

ID	Description
296410	The system fails to update the condition lines associated with the sales order when the shipment date is changed on the Route Planning Request page.
298520	The system fails to generate condition lines for the sales order after its status is updated, even when the order is reopened and released again.
302106	The system fails to remove expired sales and purchase condition rules or add required sales and purchase condition rules with the <i>Per Document</i> item type and mix and match item setup from sales orders when changing the Order Date or Shipment Date field values (depending on the setup on the Sales and Purchase Condition Setup page).

UI/UX changes

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

- The **Description** field has been added to the **Create Settlement Documents** page.
- The **Based on Condition Customer/Vendor No.** toggle has been added to the **Customer/Vendor (Source)** FastTab of the **Sales and Purchase Condition Rule Card** page.
- The *Period* option has been added to the **Calculation Period Type** field on the **Sales and Purchase Condition Calculations** page.
- The **Customer Rules** and **Vendor Rules** actions filter records based on condition customer or vendor number, in addition to the existing source type and source number on the **Sales and Purchase Condition Rule Card** page.
- The **Customer Rules Overview** and **Vendor Rules Overview** actions display all rules applicable to the relevant condition customer or vendor number on the **Sales and Purchase Condition Rule Card** page.



2502.5.0.0

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 EDI extension. For more information, see [What's new in EDI, version 2511.0.0.0](#).



2502.4.0.0

Release Note • 6/4/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
278576	The system incorrectly retains the Applies-to ID field value on the existing Condition Ledger Entries (Sales and Purchase) page even after the corresponding lines are deleted from the Periodic Settlement Journals page.



2502.3.0.0

Release Note • 6/4/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition, enhancements have been made to ensure stability when adding or modifying sales lines, including the **Condition Line** and **Promotion Condition Line** FlowFields on the **Sales Line** page. These FlowFields function reliably when conditions are recalculated or new lines are added, preventing the page from freezing.

Resolved issues

The following issues have been resolved in this release.

ID	Description
298175	The system incorrectly adds empty item charge lines when the ship-to code is changed and the Calculate Drink-it Lines action is executed to recalculate lines on the Sales Order page.
279669	The system fails to update the Quantity field value after updating the quantity on the first existing purchase order line. This issue occurs upon executing the Calculate Drink-it Lines action.
279597	An error occurs when posting a sales credit memo generated by executing the Create Settlement Document(s) action on the Condition Periodic Settlement Journals page.



2502.2.0.0

Release Note • 5/21/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
282776	The system does not allow modifying the Unit Price Excl. VAT and Direct Unit Cost Excl. VAT field values in the sales and purchase condition lines of the Sales Order and Purchase Order pages, respectively, even after changing a reason code configured with the Allow Price Change field on the Reason Code page.



2502.1.0.0

Release Note • 5/12/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
290618	The system incorrectly deletes existing sales and purchase condition lines on a released sales order when the value in the Route field on the Logistics FastTab is changed to one associated with a different shipment method code.



2502.0.0.0

Release Note • 4/29/2025 • 1 min read

Features

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

- The recurring conditions and rounding rates functionality has been enhanced for discounts and charges, specifically on periodic and order-based conditions. Additionally, the **Recurring** checkbox functionality has been restricted for periodic conditions to ensure it can only be applied to order-based conditions. To know more, see [Setting up rounding for condition rates](#).
- Updates have been made to optimize and improve system performance and reduce database locking issues during warehouse and tax-related operations.

Resolved issues

The following issue has been resolved in this release.

ID	Description
266184	The system incorrectly calculates settlement periods for sales and purchase conditions when the Use Calendar Period checkbox is cleared on the Sales and Purchase Condition Calculations page.



2501.2.0.0

Release Note • 4/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Apteau Beverage Sales-Purchase Conditions extension, Drink-IT Edition, when releasing a sales order using the sales and purchase condition rule with a calculation code, the system calculates the net % differently based on the **Ignore Item Line Discount** checkbox value. The **Ignore Item Line Discount** checkbox is editable only when the **Calculation Method Type** field value is set to *Net%* and the **Calculation Period Type** field value is set to *Order* on the **Sales and Purchase Condition Calculations** page.

- If the checkbox is selected, the system ignores the **Line Discount %** field value and uses the line amount to directly calculate the net % of the item charge in the sales order.
- If the checkbox is cleared, the system takes the **Line Discount %** field value into account when calculating the net % of the item charge in the sales order.

UI/UX changes

The **Ignore Item Line Discount** checkbox has been added to the following pages:

- Sales and Purchase Condition Calculations
- Condition Document Lines (Sales and Purchase)
- Condition Ledger Entries (Sales and Purchase)



2501.1.0.0

Release Note • 4/9/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
280973	The system fails to upgrade the Apteau Beverage Advanced Sales Management extension, Drink-IT Edition, from version 2405.3.0.0 to 2501.0.0.0 due to compatibility issues, preventing successful deployment.



2501.0.0.0

Release Note • 3/25/2025 • 1 min read

Features

With the feature added in this release of the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition, the system allows adding multiple sales and purchase condition rates for a single rule with rates based on minimum and maximum amounts specified on the **Sales and Purchase Condition Rates** page. This ensures that the system correctly validates the minimum and maximum amounts, allowing you to define multiple transport charge rates based on sales total amounts without encountering errors. This feature addresses the issue reported in bug IDs #262465, #266200, and #246827.

Resolved issues

The following issue has been resolved in this release.

ID	Description
262465, 266200, 246827	An error occurs on the Sales and Purchase Condition Rates page when an additional rate is added to an existing rule on the related Sales and Purchase Condition Rules page with values in the Minimum Amount and Maximum Amount fields.



2405.7.0.0

Release Note • 3/18/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
275530	An error occurs upon executing the Calculate Drink-IT Lines action on the Sales Order and Purchase Order pages if the associated G/L account requires dimension code with no dimension value code but the Value Posting field value is set to <i>Code Mandatory</i> on the Default Dimensions page associated with the G/L account.



2405.6.0.0

Release Note • 2/28/2025 • 2 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
258818	The system displays incorrect value in the Quantity Actual (Minimum) field on the Condition Periodic Settlement Journals page due to a filter issue, showing unrelated item ledger entries. Additionally, the system displays an incorrect sign in the Quantity Actual (Minimum) field value.
264053	The system incorrectly displays negative values in the Unit Price and Amount fields for net % periodic charges (accrued to the vendor) on the Condition Periodic Settlement Journals page and the associated documents.
261818	The system incorrectly calculates the unit price and amount upon executing the Suggest Periodic based on history action on the Condition Journals page and generates incorrect condition ledger and condition document line entries. This issue occurs when the periodic discount is created after invoicing the sales order.
253364	An error occurs upon executing the Calculate Drink-it Lines action for a sales or purchase order if the sales and purchase rules exist with the Based on Ship-to / Order Address Code field value. This issue occurs when a sales order is created for a customer with a matching ship-to code or a purchase order is created for a vendor with a matching order address code.
242749	The system fails to calculate sales and purchase condition rules in sales and purchase orders when the Use Rule Filter Sets toggle on the Sales and Purchase Condition Setup page is turned on, and sales and purchase condition rules exist with the item category group code. Additionally, the system does not synchronize the Use Rule Filter Sets and Use Rule Filter Sets Buffer toggles. The Use Rule Filter Sets Buffer toggle remains editable even when the Use Rule Filter Sets toggle is turned off.



2405.5.0.0

Release Note • 2/27/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Aptean Advanced Pricing extension. For more information, see [What's new in Advanced Pricing, version 2503.1.0.0](#).



2405.4.0.0

Release Note • 2/21/2025 • 2 min read

Enhancements/Modifications

With this release of the Apteau Beverage Sales Purchase Conditions extension, Drink-IT Edition, you can generate condition ledger entries via condition journals for transactions by recognizing item ledger entries, even without a posted document, ensuring accurate year-end settlements.

UI/UX changes

The **Based on Item Type** field name has been renamed to **Minimum Based on Item Type** on the **Item** FastTab of the **Sales and Purchase Condition Rule Card** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
265544	The system incorrectly updates the Status field for a periodic charge price on the Condition Periodic Settlement Journals page. When the minimum quantity and minimum amount are met, the periodic rules are skipped after executing the Suggest Settlement Lines action.
250156	The system fails to display the overview of the Sales and Purchase Condition Rules List page associated with the Item Card page. This issue occurs when the Use Rule Filter Sets Buffers toggle on the Sales and Purchase Condition Setup page is turned on.
249652	An error occurs when posting settlement documents if the associated rule has the Calculation Minimum Type field set to <i>Tiered (Over)</i> and the Calculation Type field set to <i>Month</i> on the Sales and Purchase Condition Calculations page.



2405.3.0.0

Release Note • 2/6/2025 • 4 min read

Enhancements/Modifications

With this release of the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition, you can define rules to provide free items for orders that include both mandatory items and recurring items that meet the recurring quantity criteria.

Note

If you clear the **Recurring** checkbox on the **Sales and Purchase Condition Rates** page, you must clear the **Recurring** checkbox on the **Mandatory Items** page.

UI/UX changes

The **Recurring** checkbox and **Recurring Quantity** field have been added to the **Sales and Purchase Condition Rates** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
252077	The system incorrectly applies discounts to customers on the Sales Order page, even when the required sales and purchase condition rules are not configured for the selected customers. This issue occurs when the Source Type field is set as <i>Classification Customer</i> and the Item Type field is set with <i>Classification Item</i> on the associated Sales and Purchase Condition Rules page.
251162	An error occurs on the Order Entry page, linked to the Sales Order page, when attempting to add a mix & match item with a periodic discount.
218879	The system incorrectly updates the Unit of Measure Code and Unit Price fields on the Condition Periodic Settlement Journals page irrespective of the values configured on the related sales and purchase condition rule. Additionally, the system incorrectly updates the Unit of Measure Code and Unit Price Excl. VAT fields on the Sales Credit Memo page.
237225	The system incorrectly updates the Status field when the Suggest Settlement Lines action is executed on the Condition Periodic Settlement Journals page, even though the conditions for the associated



	sales and purchase condition rules are met.
243091	The system fails to calculate the per document lines on the Sales Order page when the associated sales and purchase condition rule has the Item Type field set to <i>Per Document</i> , the Rate field has a value, and the Unit of Measure Code (Quantity) and Unit of Measure Code (Price) fields are left empty.
232173	The system fails to post the reversed line on the General Ledger Entries page. This issue occurs after executing the Reverse Entry action on the Condition Ledger Entries page, when the Post Accrual to G/L checkbox is cleared on the associated Sales and Purchase Condition Calculations page.
240704	The system incorrectly calculates the sales and purchase condition rules on the Sales Order page when the Item Type field is set to <i>Per Document</i> on the associated Sales and Purchase Condition Rules page. Note that if a per document rule has a lower position level than item-based rules, it will only calculate on the item amount, but if multiple per document rules share the same position level, they will be calculated the same way; however, when rules have different position levels, the higher position level will include the lower level's amount, and if the rule is set for <i>All items</i> , the unit of measure in the rate will only be considered if a minimum quantity is specified.
218437	The system incorrectly updates the Unit of Measure Code field value for the charge (Item) lines of the Sales Order page for the promotion free items, irrespective of any value selected in the Unit Measure Method Type field on the related Sales and Purchase Condition Rule Card page.
237236	The system incorrectly updates the Quantity field of the charge (Item) line on the Sales Order page when the associated sales and purchase condition rule has the Recurring checkbox selected, and the item has a non-promotion calculation code.
256021	The system incorrectly updates the Status field value upon executing the Suggest Settlement Lines action on the Condition Periodic Settlement Journals page. This issue occurs when the associated sales and purchase condition rule has multiple Minimum Amount field values.



2405.2.0.0

Release Note • 1/20/2025 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteau Beverage Foundation Management extension, Drink-IT Edition. To know more, see [What's new in Foundation Management, version 2404.4.0.0](#).

Resolved issues

The following issue has been resolved in this release.

ID	Description
259573	The system incorrectly duplicates the condition lines for non-lot tracked items on the Sales Return Order page after executing the Get Posted Document Lines to Reverse action for posted shipment documents.



2405.1.0.0

Release Note • 1/13/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
244035	The system fails to create additional condition document lines associated with sales and purchase documents upon executing the Get Posted Document Lines to Reverse action on the Purchase Return Order page for a tracked item.



2405.0.0.0

Release Note • 12/12/2024 • 1 min read

Enhancements/Modifications

This extension has been updated to ensure interoperability with the recent changes in the Apteian Beverage Foundation Management extension, Drink-IT Edition. To know more, see [What's new in Foundation Management, version 2404.0.0.0](#).



2404.6.0.0

Release Note • 12/3/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Beverage Sales-Purchase Conditions extension, Drink-IT Edition, you can specify whether the dimension field values should be updated when executing the **Calculate Drink-it Lines** action on the **Sales Order** or **Purchase Order** page. This enhancement addresses the issue reported in bug ID #251474.

UI/UX changes

The **Disable Dimension Update during Calculation** toggle has been added to the **General** FastTab of the **Sales and Purchase Condition Setup** page.

Note

The **Disable Dimension Update during Calculation** toggle is intended for temporary use and should only be turned on with a clear understanding of its functionality.

Resolved issues

The following issue has been resolved in this release.

ID	Description
251474	The system incorrectly updates the dimension field values multiple times upon executing the Calculate Drink-it Lines action on the Sales Order or Purchase Order page.



2404.5.0.0

Release Note • 11/21/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
247817	The system fails to update the Quantity field value on the Sales Order page when attempting to change the quantity for an item with a free promotion reason code. Additionally, the system fails to update the tax charge for lines associated with a free reason code if the Ignore Tax Charge checkbox is cleared on the Reason Codes list page.
229936	An error occurs upon executing the Release action on the Sales order page after adding a promotion mix item through the Order Entry page.



2404.4.0.0

Release Note • 11/13/2024 • 1 min read

Enhancements/Modifications

With this release of the Apteau Beverage Sales Purchase Conditions extension, Drink-IT Edition, code changes have been made to the *CalcRuleFilterSetFilters105FDW* codeunit to ensure an accurate group filtering process.



2404.3.0.0

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

Enhancements/Modifications

With this release of the Apteau Beverage Sales Purchase Conditions extension, Drink-IT Edition, the code related to promotions have been made open for customization.



2404.2.0.0

Release Note • 10/30/2024 • 1 min read

Enhancements/Modifications

The *OnCalcTotalsFromChargeableDocumentLinesBeforeInsertResult*, *OnCalculateAmountOnMethodTypeBeforeValidateQuantity*, and *OnBeforeSetLineBufferCalculateAmountOnMethodType* integration events have been added to the *SalesHook105FDW* codeunit.



2404.1.0.0

Release Note • 10/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
243687	The system fails to release the sales order in Dutch (nl-NL and nl-BE) because the Rule No. field has been translated incorrectly.



2404.0.0.0

Release Note • 10/25/2024 • 2 min read

Enhancements/Modifications

With this release of the Aptean Beverage Sales Purchase Conditions extension, Drink-IT Edition, the system generates the condition ledger entries for periodic discounts based on sales shipment when the **Shipment on Invoice** and **Return Receipt on Credit Memo** toggles on the **Sales & Receivables Setup** page are turned on. For purchase shipment, this functionality is applicable when the **Receipt on Invoice** and **Return Shipment on Credit Memo** toggles on the **Purchases & Payables Setup** page are turned on. Additionally, the system checks if the **Calculation Period Type** field in the condition document lines is not set to *Order*. If not, an error is thrown and the system prompts to turn on the respective toggles.

Resolved issues

The following issues have been resolved in this release.

ID	Description
236178	The system incorrectly turns off the Include in Suggest Periodic Journal toggle on the Sales and Purchase Condition Rule Card page when creating condition journal lines by executing the Suggest Periodic based on history action on the Condition Journals page.
238854	An error occurs when releasing the sales order if an item associated with sales and purchase promotion mix condition rules is included.
211905	The system incorrectly updates the item number code dimension values for promotion free/mix items.
235425	The system incorrectly deletes promotion mix items when the Item Type field is not set to <i>Per Document</i> in the sales purchase conditions rule card if the Quantity field value of a non-promotion mix item is modified.



2403.8.0.0

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

Enhancements/Modifications

With this release of the Apteau Beverage Sales-Purchase Conditions extension, Drink-IT Edition, *HasNotificationsBeenShown* and *SetHasNotificationsBeenShown* procedures have been added to the *SalesHook105FDW* and *PurchaseHook105FDW* codeunits to enhance the mix and match notification functionality on the sales and purchase headers.



2403.7.0.0

Release Note • 10/9/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
238565	The system fails to release an order when a sales purchase condition line is associated with it. This issue occurs only when the selected language is <i>German (Switzerland) - de-CH</i> .



2403.6.0.0

Release Note • 9/30/2024 • 2 min read

Enhancements/Modifications

With this release of the Aptean Beverage Sales Purchase Conditions extension, Drink-IT Edition,

- When you close the **Order Entry** page or execute the **Apply Changes** action, the **Get Mix & Match Promotion Lines** action is automatically executed when the **Apply Order Entry Directly** toggle on the **Advanced Sales Management Setup** page is turned on. After the execution, if the **Undefined Quantity** field value is
 - Not equal to zero, the system automatically opens the **Mix & Match** page and allows you to make the the relevant changes.
 - Equal to zero, the system skips opening the **Mix & Match** page and calculates the document lines.
- When you create a new rule for a promotion mix item and set a quantity in the **Maximum Quantity Deal (per Source Member)** field, the system allows only one item to be availed from the **Sales and Purchase Condition Rates Mix & Match Items** page, regardless of how many sales orders are created for the item.

Resolved issues

The following issues have been resolved in this release.

ID	Description
220725	The system does not apply the sales purchase condition rules correctly for maximum quantity deals in sales orders when multiple rules exist, resulting in incorrect quantity and price calculations.
220538	The system fails to calculate the sales purchase condition rules for the items on sales order lines. This issue occurs when the sales order has multiple lines, the related sales and purchase condition rule has the Direction of Movement field set to <i>Inbound</i> , and the Use Rule Filter Sets toggle on the Sales and Purchase Condition Setup page is turned on.
211946	The system fails to calculate the condition periodic settlement journal lines correctly based on the value in the Calculation Method Type field on the Sales and Purchase Condition Calculations page. Additionally, the system incorrectly updates the Status field on the Condition Periodic Settlement Journals page has been incorrectly updated as <i>Suggested</i> .
221402	The system incorrectly calculates the Amount field value on the Condition Periodic Settlement Journals page. This issue occurs when the associated sales purchase condition rule is defined with a minimum amount or quantity.



2403.5.0.0

Release Note • 9/9/2024 • 2 min read

Enhancements/Modifications

With this release of the Aptean Beverage Sales Purchase Conditions 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.

Resolved issues

The following issue has been resolved in this release.

ID	Description
231502	The system incorrectly calculates condition lines related to tax and empty goods lines. This issue occurs when the Calculate on Tax and Calculate on Deposit fields on the Sales and Purchase Condition Rule page are set to <i>Add Up</i> or <i>Subtract</i> for the associated sample item.
231707	The system fails to update the sales and purchase condition document lines and incorrectly calculates the item charge lines for the items with discounts. This issue occurs only when the related order entry page is re-opened, quantity is changed and order entry page is closed.



219054

The system fails to update the sales purchase condition lines associated with an item after modifying item quantity. This issue occurs in both sales and purchase orders when a released order is reopened, the quantity is changed, and the order is re-released.



2403.4.0.0

Release Note • 9/2/2024 • 4 min read

Enhancements/Modifications

With this release of the Apteau Beverage Sales Purchase Conditions extension, the *OnBeforeFindValidClassificationCodes* integration event has been added to the *CalcRuleFilterSetFilters105FDW* codeunit to allow for additional logic execution before finding valid classification codes, thereby enhancing extensibility.

Resolved issues

The following issue has been resolved in this release.

ID	Description
212229	An error occurs upon executing the Suggest Settlement Lines action on the Condition Periodic Settlement Journals page. Additionally, the Loan Balance (Cap.) (LCY) field is incorrectly updated with 0.
223682	The system incorrectly calculated the sales purchase condition rules on the Condition Document Lines (Sales and Purchase) page associated with a sales order when the Status field is not set to <i>Certified</i> . This issue arises when a customer is included in the related rules on the Sales and Purchase Condition Rules page.
221686, 220384	The system fails to recalculate the charges or discounts when the Quantity field value is changed and the order is released on the Sales Order page.
225353	The Condition Customer No. field is not updated when the Bill-to Customer field is modified on the Customer Card page.
216536	The system incorrectly displays the Quantity HL (Minimum) field value on the Condition Ledger Entries (Sales and Purchase) page. This issue arises when a sales order is posted for shipping and invoicing on the Sales Order page.
226824	The Amount field value is not calculated correctly on the Sales Order page based on the unit of measure code selected for the associated rule. This issue occurs when the related rule has the Item Type field set to <i>Per Document</i> on the Sales and Purchase Condition Rule Card page.
216812	The sales purchase condition rates are incorrectly calculated on the Lines FastTab of the Sales Order page. This issue arises when calculation is done for a return item.



224592	The system fails to update lines on the Condition Document Lines (Sales and Purchase) page when the Quantity field value is changed after reopening partially posted or invoiced sales documents.
221547	The promotion free items cannot be added when the Free Item No. field is set as <i>Item Other</i> , and the Maximum Free Quantity and Maximum Quantity Deal (per Source Member) fields have a blank value on the Sales and Purchase Condition Rule Card page.
220724	An error occurs on the Sales Order page while releasing the order when a rule with Maximum Quantity Deal and Maximum Quantity Deal (per Source Member) field values are applied.
220214	The sales purchase condition rule incorrectly prevents availing promotion items on subsequent sales orders when the maximum quantity deal has been reached.
220501	The sales purchase condition rule incorrectly applies the maximum quantity deal to multiple sales orders when a customer is included in the rule, despite the limit being set to <i>1</i> .
216300	An error occurs on the Sales Order page while releasing the order when promotion mix items are added from the Promotion Item Mix & Match Selection (Sales and Purchase) page.
220012	The sales and purchase condition rules are not recalculated on the sales order line after modifying the quantity in the reopened sales order and rereleasing it.
221533	The mix and match promotion free items are removed from the sales order line after releasing the sales order when the associated sales and purchase condition rule has multiple lines.
224062	An error occurs when the Quantity field value is modified on the Sales Order page and the Calculate Drink-IT Lines or Release action is executed with multiple promotion-free sales purchase condition rules.
230627	The discounts and periodic discounts are not calculated based on the sales and purchase condition rule for a selected item.
223918	The promotion fee items are incorrectly added to each sales order line when the Item Type field set to <i>Per Document</i> on the Sales and Purchase Condition Rule Card page for the applied rule and the User Rule Filter Sets toggle on the Sales and Purchase Condition Setup page is turned on.



2403.3.0.0

Release Note • 8/9/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
224727	The system incorrectly updates the net% discount value in the Unit Price Excl. VAT field on the sales order line. This issue occurs when a released sales order is reopened, the quantity is modified, and the order is released again.



2403.2.0.0

Release Note • 7/19/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
222076	The system incorrectly updates the Condition Amount Excl. VAT field on the Gross Net Price List page for customers configured with the gross net price functionality.



2403.1.0.0

Release Note • 7/16/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
216817	The system fails to post condition accruals on the Condition Ledger Entries (Sales and Purchase) page upon selecting the Preview action on the Post Condition Accrual to G/L page. This issue arises when the Post Accrual to G/L checkbox is not selected on the Sales and Purchase Condition Calculations page.

Note

Ensure that the **Sales and Purchase Condition Calculations** page is configured before you access this functionality, as it runs a codeunit to correct the old data. The codeunit will update the **Accrual Posted to G/L** field on the **Condition Ledger Entries (Sales and Purchase)** page based on the **Post Accrual to G/L** field on the **Sales and Purchase Condition Calculations** page.



2403.0.0.0

Release Note • 7/3/2024 • 4 min read

Features

With this release of the Apteau Beverage Sales-Purchase Conditions, Drink-IT edition, you can limit the promotions, discounts, or charges given to the customers in total as well as per customer and per rule.

Enhancements/Modifications

With this release of the Apteau Beverage Sales-Purchase Conditions, Drink-IT edition, performance has been optimized to prevent system delays.

UI/UX changes

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

- The **Maximum Quantity Deal (per Source Member)** and **Maximum Quantity** fields are added to the **Rates** FastTab of the **Sales and Purchase Condition Rule Card** page.
- The **Maximum Number of Rule Instances** and **Maximum Number of Posted Invoice Rule Instance** fields are removed from the **Others** field on the **Customer/Vendor Source** FastTab of the **Sales and Purchase Condition Rule Card** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
216058	The system fails to calculate periodic discounts correctly on the Condition Document Lines (Sales and Purchase) page.
213498	The system fails to calculate promotion free items on the Lines FastTab of the Sales Order page upon executing the Release or Calculate Drink-it Lines action. This issue occurs when the item number is specified on the Sales and Purchase Condition Combined Minimum & Mandatory page, and the Free Item No. field has a value on the Sales and Purchase Condition Rule Card page, but the associated free items do not appear on the Sales Order page.



200632	The system fails to calculate the condition rules for the included customer when you execute the Release or Calculate Drink-it Lines action on the Lines FastTab of the Sales Order page.
196233	Performance optimization in the background calculation for the classification caused a slower response time.
189656	Upon executing the Release or Calculate Drink-it Lines action, the payment for the associated item is not calculated on the Sales Order page. This issue occurs when on the Sales and Purchase Condition Setup page, the Use Rule Filter Sets toggle is turned off and the value in the Payment Method Code field on the Sales Order page.
216074	The promotion free items are not calculated on the Sales Order page, when the Item Type field is set to <i>Per Document</i> and Free Unit of Measure Code field value is different from Unit of Measure Code (Quantity) field value on the Sales and Purchase Condition Rules page.
215143	The system fails to create condition lines on the Condition Documents Line page upon executing Release or Calculate Drink-it Line action. This issue occurs when periodic rules are applied to the sales order via the Sales and Purchase Condition Rates page.
202996	The Quantity UoM (Minimum) field value is incorrectly calculated on the Condition Ledger Entries (Sales and Purchase) page.
215144	An error occurs on the Sales Order page while releasing the order associated with the sales and purchase condition rules that are certified.
203743	The Amount field on the Sales Order page is not calculated for multiple net level discounts when both the Unit of Measure Code (Quantity) and Item No. fields are filled on the Sales and Purchase Condition Rates page.
216451	Upon modifying the Quantity field on the Sales Return Order page, the rest of the associated fields on the Lines FastTab do not get updated. This issue occurs when the Get Posted Document Lines to Reverse action is executed on the Sales Return Order page and a <i>Document No.</i> is selected on the Posted Sales Document Lines page.
205094	The periodic and combined item rules are not updated on the Sales and Purchase Condition Rules List page. This issue occurs when the Use Rule Filter Sets toggle is turned off on the Sales and Purchase Condition Setup page, and the Item Rules Overview action is executed on the Item Card page.



2402.0.0.0

Release Note • 6/17/2024 • 2 min read

Features

With this release of the Apteau Beverage Sales-Purchase Conditions extension,

- On the **Sales and Purchase Conditions Rule Card** page, new field options are added to work with the rounding for equivalent Unit of Measures.
- You can use the combined and mandatory item functionality for mix & match free item type on the **Sales and Purchase Conditions Rule Card** page.

Enhancements/Modifications

With this release of the Apteau Beverage Sales-Purchase Conditions extension, on the **Sales and Purchase Condition Rules: Status: Certified** page, when the **Suggest Periodic based on history** action is executed, the condition journal lines are created with the correct unit of measure code and unit price. Additionally, the condition journal line could be posted on the **Condition Journals** page only when the **Unit Price** field has a value.

UI/UX changes

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

- The **Edit Mix & Match Item Mandatory Rates** action is added to the **Rules** FastTab on the **Sales and Purchase Condition Rule Card** page.
- The **Rounding Method Type (Quantity)** field is added to the **Rates** FastTab on the **Sales and Purchase Condition Rule Card** page.
- The **Item No.**, **Unit Of Measure Code (Quantity)**, and **Minimum Quantity** fields are added to the **Sales and Purchase Condition Combined Minimum & Mandatory** page.

Resolved issues

The following issues have been resolved in this release.

ID	Description
191563	An error occurs on the Sales Order page when attempting to execute the Calculate Drink-it Lines or Release action, preventing the calculation of the condition rule. This error occurs specifically when the



	Sales and Purchase Condition Setup page has the Use Rule Filter Sets toggle turned on, and the Item Type field is configured as <i>All Items</i> with the Based On Item Type field set to <i>Item Other</i> .
172332	A performance issue occurs when opening an item card with RuleFilterSet.



2401.3.0.0

Release Note • 6/4/2024 • 2 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
196018	The ledger entries are not generated on the Condition Ledger Entries (Sales and Purchase) page, when a sales order is posted for ship and invoice for a multiple lot tracked item on the Sales Order page.
193401	The value in the Item Description field is not updated with respect to the Item No. field value on the Promotion Item Mix & Match Selection (Sales and Purchase) page.
199690	The Field Caption field on the Rule Filter Sets page is not updated upon opening this page from the Sales and Purchase Condition Rules page.
199356	On the Sales and Purchase Condition Classification page, it is possible to delete a condition classification code which is active on the Sales and Purchase Condition Rules page.
191815	Upon executing the Calculate Drink-it Lines or Release and Condition Lines actions, the periodic rules associated with the sales order are not created on the Sales Order page. This occurs when on the Sales and Purchase Condition Setup page, the Use Rule Filter Sets toggle is turned on, and the Based on Source Type field is set to either <i>Customer Classification Other</i> or <i>Group Classification Other</i> on the Sales and Purchase Condition Rules page.
207660	On the Sales and Purchase Condition Setup page, when the Use Rule Filter Sets toggle is turned on/off, then upon executing the Customer Rules Overview action on the Customer Card page, the associated rule is not visible on the Sales and Purchase Condition Rules List page.
190720	When using <i>Per Document</i> as Item type on the Sales and Purchase conditions Rules page, the Unit Price Excl. VAT field is incorrectly calculated on the Sales Order page.



2401.2.0.0

Release Note • 5/15/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
193454	An error occurs on the Sales Order page, upon changing the Shipment Date for a released sales order on the Sales Order and Route Planning Worksheet pages.
184583	Upon renaming the Code field on the Sales and Purchase Condition Classifications page, the Field Value field is not updated on the Rule Filter Sets page.
179484	When the Item Type field is set as <i>Per Document</i> on the Sales and Purchase Condition Rule Card page, when using the copy function and releasing the credit memo an extra line is added on the Lines FastTab of the Sales Credit Memo page.



2401.1.0.0

Release Note • 4/17/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
194883	The calculation of the Condition Alerts took longer than expected on the Order Entry page.



2401.0.0.0

Release Note • 4/5/2024 • 5 min read

Enhancements/Modifications

This release of the Apteau Beverage Sales-Purchase Conditions extension has the following enhancements:

- Upon executing the **Return Entry** action on the **Sales Order** page, the correct sign is displayed in **Quantity** on the **Lines** FastTab.
- The **Language Code** selected on the **Sales and Purchase Condition Calculation Translations** page flows to the **Sales and Purchase Condition Rule Card** page for a particular calculation code when the **Copy translations to Condition Rules** toggle on the **Sales and Purchase Condition Setup** page is turned on.
- The **Conditions Alerts** field on the **Order Entry** page is getting updated as expected when the **Sales and Purchase Condition Rule Card** page has multiple **Rates**.
- The **Condition Alerts** field gets updated upon executing the **Calculate Condition Alerts** action on the **Order Entry** page.
- Upon opening the Mix & Match notification on the **Sales Order** page, on the **Promotion Item Mix & Match Selection (Sales & Purchase)** card page you can select free item for the item mentioned in the notification.
- Modification were made to `GetItemsFilteredOnBased(Item)` from table SPC Rule Setup to avoid the error that occurred for the associated rules.
- Enhancements were made to the Filter rule to ensure correct calculations.
- Upon executing the **Suggest Historic Entries** action in the **Sales and Purchase Condition Rule** page and then posting the Condition Journal, the Condition Ledger Entries are created.
- You can generate condition ledger entries via condition journals for transactions by recognizing item ledger entries, even without a posted document, ensuring accurate year-end settlements.

UI/UX changes

The **Copy translations to Condition Rules** toggle is added on the **Sales and Purchase Condition Setup** page.

Resolved issues

The following issues have been resolved in this release:

ID	Description
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171478	On the Sales and Purchase Condition Include-Exclude Rules page, when the Rule Type value is changed for a customer then the rates get incorrectly calculated on the Lines FastTab upon executing the Calculate Drink-IT Lines action on the Sales Order page.
171476	On the Sales Order page, upon executing the Calculate Drink-IT Lines action, the Quantity on the Lines FastTab is not rounded off as expected.
175297	On the Sales and Purchase Condition Setup page, when the Use Rule Filter Sets toggle is turned on, the lines do not get updated as expected upon executing the Calculate Drink-IT Lines action on the Sales Order page. This happens for an Item Type which is Per Document .
175647	Upon executing the Return Entry action on the Sales Order page, incorrect Quantity is calculated on the Lines FastTab, and the Direction of Movement set on the Sales and Purchase Condition Rule Card page is not taken in consideration.
167429	On the Order Entry page, the Condition Alerts field does not get updated as expected when the Return Order Entry action is executed on the Sales Order page. This happens for an Item Type set as <i>Per Document</i> on the Sales and Purchase Condition Rule Card page.
166861	A performance issue occurs while doing calculation for <i>Per Document</i> on the Sales Order page.
164477	An error occurs on the Sales Return Order page, when a rule set up with recursive rate and Based on Item field as other than <i>Member</i> .
187283	The Unit Price is incorrectly calculated for the periodic conditions on the Condition Periodic Settlement Journals page.
165851	When the Application Policy field is set as <i>Once by priority</i> and the Price Calculation Method Type field is set as <i>Best Condition (Highest)</i> , upon executing the Calculate Drink-it Lines action on the Sales Order page, only the rule with highest priority gets updated in sales order line.
162542	An error occurs upon trying to reopen a released sales order and deleting it.
171342	Per Document Charge applied in a released sales document with warehouse location disappears after registration of returned empties.
187118	An error occurs upon executing the Calculate Condition Lines action on the Indirect Sales Journal page and the Indirect Sales Journals cannot be posted.
175510	Upon executing the Calculate Drink-IT Lines action on the Sales Order page, on the Lines FastTab, the calculation of rule-based item combine rate type is inconsistent for per-document calculations.
178189	When the Price Calculation Method field is set as <i>Hierarchical Price</i> on the Sales & Receivables Setup page, then the sales order line is not getting updated for the item with respect to Customer Price & Customer Group Price on the Customer card page.



179002	On the Sales and Purchase Condition Setup page, when the Use Rule Filter Sets toggle is turned on, then the lines are not getting updated with respect to the include/exclude on the Sales and Purchase Condition Rules card page.
189047	Upon creating a new customer and executing the Customer Classification Overview action on the Customer Card page, the condition classification is not added on the Sales and Purchase Condition Classifications page.
171264	Upon executing the Get Mix & Match Promotion Lines action on the Sales Order page, the Promotion Item Mix & Match Selection (Sales and Purchase) card page is not getting updated as expected.
166270	A performance issue occurred related to <code>GetItemsFilteredOnBased</code> on the Sales and Purchase Condition Rule Card page.
175233	On the Sales and Purchase Condition Setup page, when the Use Rule Filter Sets toggle is turned on, various rules are either not calculated or incorrectly calculated.
184177	Upon posting a sales invoice for a LP Lot tracked item, the condition ledger entries are not created on the Condition Ledger Entries (Sales and Purchase) page.
175506	The calculation of all priority of the same calculation code is ignored when the Application Policy is set as <i>All</i> on the Sales and Purchase Condition Calculations page.



2312.1.0.0

Release Note • 3/11/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release:

ID	Description
177691	The entries are not generated on the Condition Periodic Settlement Journals page while executing the Suggest Settlement Lines action for the posted sales order linked to the sales and purchase condition rule calculated with the Rule on Hold checkbox selected.



2312.0.0.0

Release Note • 12/13/2023 • 6 min read

Enhancements/Modifications

This release of the Apteau Beverage Sales-Purchase Conditions extension has the following enhancements:

- The Condition Date fields on the sales or purchase order enable you to define the conditions based on the order date or shipment date. This default setting can be changed per customer or vendor.
- Separate Customer/Vendor Posting Groups can be defined for the periodic settlement documents.
- The *Hierarchical Pricing* option in the **Price Calculation Method** field enables you to price the items by priority.
- Changing the Condition date in the released order updates the prices and charges based on the Foundation Setup.
- The **Maximum Number of Rule Instances (per Member)** field enables you to define the maximum number of promotions that could be sent to a customer.
- A notification message will appear when you release a sales order with Mix & Match Promotion.
- The **Reason Mandatory for Condition Price Change** toggle on the **Sales and Purchase Condition Setup** page allows you to specify the reason code when unit price or line amount fields are changed on the sales or purchase lines.
- You can manually change the price on the attached condition line after shipment or receipt when the item has a reason code that allows it.
- The **Maximum Number of Rule Instances (per Rule)** field on the Sales and Purchase Condition Rule card and list page provides information about the maximum number of times the rule must be applied. Document lines for Return Orders or entries from credit memos are not included in it.
- The **No. of Ordered Rule Instances** field on the Sales and Purchase Condition Rule Card and list page provides information about how many times the rule has been applied to non-posted sales and purchase order documents.

UI/UX changes

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

- The **Condition Customer Date** field has been added to the **Sales and Conditions** FastTab of the **Sales Order** page.
- The **Condition Vendor Date** field has been added to the **Purchase and Conditions** FastTab of the **Purchase Order** page.
- The **Condition Customer Date Type** field has been added to the **Sales Conditions** FastTab of the **Customer Card** page.



- The **Condition Vendor Date Type** field has been added to the **Purchase Conditions** FastTab of the **Vendor Card** page.
- The **Default Condition Date** field has been added to the **Sales & Receivables** and **Purchase & Payables** FastTab of the **Sales and Purchase Condition Setup** page.
- The *Hierarchical Pricing* option has been added to the **Price Calculation Method** field on the **Prices** FastTab of the **Sales & Receivables Setup** page.
- The *Hierarchical Pricing* option has been added to the **Price Calculation Method** field on the **Prices** FastTab of the **Purchase & Payables Setup** page.
- The **Maximum Number of Rule Instances (per Member)** field has been added to the **Customer/Vendor (Source)** FastTab of the **Sales and Purchase Condition Rules** page.
- The **Reason Mandatory for Condition Price Change** toggle has been added to the **Sales & Receivables** and **Purchase & Payables** FastTab of the **Sales and Purchase Condition Setup** page.
- The **Maximum Number of Rule Instances (per Rule)** field is added to the **Customer/Vendor(Source)** FastTab of the **Sales and Purchase Condition Rule Card** page. This field is also added to the **Sales and Purchase Condition Rules** list page.
- The **No. of Ordered Rule Instances** field is added to the **Customer/Vendor(Source)** FastTab of the **Sales and Purchase Condition Rule Card** and list page. This field is also added to the **Sales and Purchase Condition Rules** list page.

Resolved issues

The following issues have been resolved in this release:

ID	Description
248585	When posting the condition journal lines, it derives dimension values from item ledger or indirect sales entries and not from item charge codes or G/L accounts.
248727	The sign calculation is incorrect for the Condition Periodic Settlement Journals when only a return order is posted in a period for net% conditions.
254681	The Dimension field values on the item lines are not inherited to the attached sales and purchase condition lines.
142686	An error occurs when attempting to delete an unposted item line that is added with another item line containing deposits.
254957	The Quantity field on the Mix and Match selection page is wrongly inherited from the order line.
142689	On shipping an order with a per document charge or discount, the per document lines are calculated and added twice.



154650	While executing the Calculate Drink-it Lines action on the sales order with Released status, the discount values are not correctly calculated from the third line for the same item.
155041	While executing the Calculate Filter Sets action, the filters are not processed correctly for extensive list of records or text strings.
155047	The response time of the Sales and Purchase Condition pages is delayed due to the release and calculated related actions.
155994	The Price Calculation Method field is displayed twice on the Sales & Receivables Setup page. The same occurs in the Customer/Vendor Card and Customer Price Group pages. Note: Depending on the availability of the feature, the standard field is visible, while the Drink-IT field is not visible.
161375	The Mix & Match Promotion line is not created while executing the Release or Calculate Drink-it Lines action on the Sales Order card page.
148722	The selected Mix & Match item was not updated after the changes on the Return Entry page.
161896	While posting the warehouse shipment from the sales order, the charge lines are not posted.
158975	Multiple errors occur when the Use Rule Filter Sets toggle on the Sales and Purchase Condition Setup page is turned on.
158953	<ul style="list-style-type: none"> • The Status field on the Condition Periodic Settlement Journals page get automatically updated with <i>Status</i> for all records. • The value in the Unit Price field gets removed with <i>Status Skipped</i>.
158956	The wrong sign is displayed in the Condition Sales Amount(Actual) field on the Condition Ledger Entries (Sales and Purchase) page for the Per Document charge records.
161811	Performance issue occurs while releasing the purchase order despite of having no Sales and Purchase Condition Rules.



23.500.105872.0

Release Note • 7/6/2023 • 4 min read

Resolved issues

PBI No.	Description
245584	Based on item type Same, in condition rule - the wrong amount in settlement jnl.
245533	Periodic settlement - wrong sign in condition journal for % settlements on return orders
244076	Priority policy Once should not skip other calculation codes
244979	Bug warehouse receipt error from sales return order
244226	Conditions periodic settlement - Should summarize (header) by Payment method and Payment terms of the rules
242649	Condition periodic settlement error when the same item is multiple times in a shipment, lot tracked or not
239381	Fix filter issues in Sales and Purchase Condition Rules when using Include-Exclude Rules

PBI 245584 - Based on item type, Same in condition rule - the wrong amount in settlement jnl.

What

When returns were posted, via a return order or via a sales order (negative qty), the periodic settlement journal could, in some cases calculated with the wrong sign for that. That has been resolved.

PBI 245533 - Periodic settlement - wrong sign in condition journal for % settlements on return orders

What

when only returns were posted for an item in a period, and the condition ledger entry was posted through the condition journal (the rule was certified after shipments and receipts were already posted), the sign would appear wrong in the settlement for a net% rule. That has been resolved.



PBI 244076 - Priority policy Once should not skip other calculation codes

What

When multiple condition rules apply to an item for a customer, it can be set up whether all are calculated or only one. It is determined by the application policy of the selected calculation code. With Once by priority, only the rule with the lowest position level will be calculated for an item line for a customer, other possible rules with the name calculation code are skipped. However, rules with different calculation codes were also skipped. That has been corrected.

PBI 244979 - Bug warehouse receipt error from sales return order

What

When posting as a partial warehouse receipt for a sales return order with periodic SPC condition lines that included accrual posting to G/L, an error would occur on changing the quantity to receive. That has been resolved.

PBI 244226 - Conditions periodic settlement - Should summarize (header) by Payment method and Payment terms of the rules

What

You could already define payment terms and payment method on a condition rule, meant for the periodic settlement document. When creating settlement documents from the condition periodic settlement journal, they were ignored. That has been corrected, the Create settlement document function now contains two new header summarize options: *By Payment Terms* and *By Payment Method*

When checked, rules for the same customer or vendor will be grouped in the same settlement document when having the same values.

PBI 242649 - Condition periodic settlement error when the same item is multiple times in a shipment, lot tracked or not

What

Condition periodic settlement error when the same item is multiple times in a shipment, lot tracked or not

Why



When you create a sales credit memo from a condition periodic settlement journal, you get an error message when you try to post the sales credit memo if the same item appears several times on the shipment. This issue is fixed.

PBI 239381 - Fix filter issues in Sales and Purchase Condition Rules when using Include-Exclude Rules

What

Issue in Sales and Purchase Condition Rules when using Include-Exclude Rules

Why

When you want to exclude a classification item from a classification item, it doesn't work. Same issue when you want to exclude a classification customer or classification vendor within a classification customer or classification vendor. When you want to exclude a classification item, you get an error message. This issue is fixed.



23.300.100868.0

Release Note • 7/6/2023 • 12 min read

Enhancements/Modifications

The Drink-IT Sales and Purchase has been rebranded to **Aptean Beverage Sales-Purchase Conditions, Drink-IT Edition**.

Features

PBI No.	Description
216742	BC Sales-purchase price interface - extend with priority
241602	Double mix & match promotion per document after selection and release + approval
231267	SPC Periodic Settlement - Include Loan in SPC Rule and Settlement (SPC for CMG)
239029	SPC Contract Management - Add Contract No. to Condition Rule (SPC for CMT)
241124	Subtract Taxes from calculation basis for Gross% and Net% Calculations

Resolved issues

PBI No	Description
239033	Condition journal - Nothing suggested where it should
239102	Condition journal - suggest and post for only changed rules
235464	Unit Price/Direct Unit Cost in Sales-Purchase Line is not correct when Sales/Purchase UOM of item is not equal to Base UOM and Price Calc. Unit of Measure is filled in

PBI 216742 - BC Sales-purchase price interface - extend with priority

What

As a beverage company, we have a **hierarchical price** policy. The price for a specific customer has priority over a price for a group of customers where that customer is a member. The price for the group has priority over the price




for all customers. A second option is also applicable **Lowest Price**, with this price calculation method the system always looks for the lowest price in the system.

Why

As a sales manager, I want to be able to apply one of the two policies available (Lowest or Hierarchical), so we are able to maintain our prices in an efficient way.

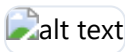
How

Setup

- On the **Sales & Receivables Setup** page, on the **Prices** FastTab, the **Price Calculation Method** field is available
 - Select the Search icon , enter **Sales & Receivables Setup**, and then choose the related link.
 - Go to **Prices** FastTab, choose the correct price calculation method in the **Price calculation Method** field.

Note

No Setup change done, the standard price calculation is applicable which is **Lowest**.

- On the **Customer card**, **Price calculation method** field is available on the **Pricing** FastTab.
 - Select the Search icon , enter **Customers**, and then choose the related link.
 - Open the **Customer** card by selecting a customer from the list page.
 - Go to the **Invoicing** FastTab, in the group **Prices and Discounts** group, choose the correct price calculation method in the **Price Calculation Method** field.

Note

No Setup change done or blanc setup means that the setup from Sales & receivables setup will be taken as the default price calculation method.

PBI 241602 - Double mix & match promotion per document after selection and release + approval

What

By releasing a Sales order or sending the approval Request, the pop-up and notification appears that a mix & match condition rule is in place for the order. In the mix & match page the correct min. Qty, max Qty. and Qty to handle is



shown to specify depending on the weight of the setup. By closing the mix & match page the items are correct added to the Sales order following the setup of reason code for Tax and Empty goods Management.

Why

As a Sales employee I want to be able to specify correct my mix and match promotions on Release or by sending the approval Request.

PBI 231267 - SPC Periodic Settlement - Include Loan in SPC Rule and Settlement (SPC for CMG)

What


Sales and Purchase Conditions relation with Contract Management Loans.

Why

As a beverage company, you have agreements with your customers. Part of this agreement can be a loan that you registered in a Drink-IT Contract Management Loan.

A possible pay back method for such a loan is pay back by periodic discounts. As a sales manager, you want to be able to connect a periodic discount rule to a loan, so the settlements for that rule will be applied to the loan amount that was given to the customer.

How

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
2. On the **Sales and Purchase Condition Rules** list page, edit, or create as new, the rule you want to connect to a loan.
3. On the **Sales and Purchase Condition Rule Card** page, on the **Contract Management** FastTab, select the loan in the *Loan No.* field. You can only select a loan for rules with the *Source Type* **Customer** or **Vendor**.

Once the loan number is selected on the rule:

- New and existing **Condition Ledger Entries (Sales and Purchase)** will show this value in the *Loan No.* field.
- The **Condition Periodic Settlement Journals** will show this value in the *Loan No.* field.
- Settlement documents (for instance a sales credit memo) will be applied with the Loan Pay Out.
- Settlement documents will show the number in the header and in lines of the *Comment type*.



PBI 239029 - SPC Contract Management - Add Contract No. to Condition Rule (SPC for CMT)

What


Sales and Purchase Conditions relation with Contract Management Loans.

Why

As a beverage company, you have agreements with your customers. This agreement can be registered in a Drink-IT Contract Management Contract.

Part of such contracts are the sales conditions. They are mentioned in the contract document. As a sales manager, you want to be able to trace the condition rule to the contract.

How

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
2. On the **Sales and Purchase Condition Rules** list page, edit, or create as new, the rule you want to connect to a contract.
3. On the **Sales and Purchase Condition Rule Card** page, on the **Contract Management** FastTab, select the contract in the *Contract No.* field. You can only select a contract for rules with the *Source Type* **Customer** or **Vendor**.

Once the contract number is selected on the rule:

- New and existing **Condition Ledger Entries (Sales and Purchase)** will show this value in the *Contract No.* field.
- The **Condition Periodic Settlement Journals** will show this value in the *Contract No.* field.

PBI 241124 - Subtract Taxes from calculation basis for Gross% and Net% Calculations

What

Subtract Taxes from calculation basis for Gross% and Net% Calculations.

Why

In the tobacco industry, the retail prices are fixed for every retailer and they include vat and excises. The vat is paid at the source. As a sales manager, you want to be able to give discounts that you can register as a percentage on the net price, so you can optimize your sales in an efficient way.



How

- On the Sales and Purchase Conditions, in the **Calculate on Tax** field, you can choose:
 - Blank (same as unselected in previous Drink-IT version)
 - Add Up Taxes (same as selected in previous Drink-IT version)
 - Subtract Taxes
 - The Tax Amount that is Added Up or Subtracted from the base amount before the percentage calculation are Tax Amounts for all movement types.
- On the Sales and Purchase Conditions, in the **Calculate on Deposit** field, I can choose:
 - Blank (same as unselected in previous Drink-IT version)
 - Add Up Deposits (same as selected in previous Drink-IT version)
 - Subtract Deposits

PBI 239033 - Condition journal - Nothing suggested where it should

What

The condition journal would not suggest any line for a rule setup with Calculate on Special Price = Both. That has been resolved.

PBI 239102 - Condition journal - suggest and post for only changed rules

What

Suggest only for changed and newly created rules in the condition journal.

Why

Running the **Suggest Periodic based on History** function in the Condition Journal can become time consuming, for checking item ledger history when it checks for all condition rules.

How

Condition rules for periodic settlement get a flag **Include in Suggest Periodic Journal**, when released. When running the **Suggest Periodic based on History** in the **Condition Journal**, a default filter is set on this new flag. The field is set off when no lines need to be created or when lines were posted in the condition journal. A next time the rule is not checked again.



PBI 235464 - Unit Price/Direct Unit Cost in Sales-Purchase Line is not correct when Sales/Purchase UOM of item is not equal to Base UOM and Price Calc. Unit of Measure is filled in

What

Unit Price/Direct Unit Cost in Sales-Purchase Line is not correct when Sales/Purchase UOM of item is not equal to Base UOM and Price Calc. Unit of Measure is filled in.

Why

As a purchaser, you want to buy an item in Crates, while the base unit of measure is Bottle. When you create a purchase order, the Direct Unit Cost is wrong. The issue appears when the unit of measure in the field Price Calc. Unit of Measure is different from the Purch. Unit of Measure on the item card. This issue is fixed.



20.202301.0.0

Release Note • 7/6/2023 • 6 min read

Features

PBI No.	Description
229576	Confict Approval Periodic Condition Journal with other customized workfows and give error(s)

Resolved issues

PBI No.	Description
233504	Recurring Min. qty UOM does not work fine for promotion free item and promotion discount
233660	When recurring minimum rate, Calculate minimum 'Over' calculates as 'Under'

PBI 229576 - Confict Approval Periodic Condition Journal with other customized workfows and give error(s)

What

Approvals in the Periodic Condition Journal.

Why

As a Sales Manager, you don't want to allow every user to settle periodic conditions. Senior employees should approve them from approval entries before settlements can be executed, so segregation of duties is guaranteed.

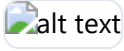
As a Purchase Manager, you don't want to allow every user to settle periodic conditions. Senior employees should approve them from approval entries before settlements can be executed, so segregation of duties is guaranteed.

As a small business owner, you don't have any segregation of duties. Approval flows are not needed on periodic conditions, so we can settle them in an efficient way.

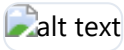
How

Enable the workflow

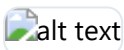


1. Select the Search icon  , enter **Workflows**, and then choose the related link.
2. On the **Workflows** page, choose the **New Workflow from Template** action.
3. On the **Workflow Templates** page, select the **Periodic Journal Batch Approval** Workflow and then choose OK.
4. Adjust the workflow as necessary and select the enabled field.

Setup approvers

5. Select the Search icon  , enter **Approval User Setup**, and then choose the related link.
6. On the **Approval User Setup** page, fill in the (condition) fields as necessary. Hover over a field to read a short description.
7. Periodic Sales Condition Amount
8. Unlimited Periodic Sales Condition Approval
9. Periodic Purchase Condition Amount
10. Unlimited Periodic Purchase Condition Approval

Send and receive requests

11. Select the Search icon  , enter **Condition Periodic Settlement Journals**, and then choose the related link.
12. On the **Condition Periodic Settlement Journals** page, choose the **Suggest Settlement Lines** action to create lines in the journal.
13. Choose the Approval Request **Send Journal Batch** action to create an approval request for the journal.

See also: [Approve or Reject Documents in Workflows - Business Central | Microsoft Learn](#)

PBI 233504 - Recurring Min. qty UOM does not work fine for promotion free item and promotion discount

What

When a condition rate for a promotion (free item) rule was checked with Recurring, the promotion was not calculated well. That has been resolved



PBI 233660 - When recurring minimum rate, Calculate minimum 'Over' calculates as 'Under'

What

Mixed pallet surcharge case. The recurring minimum 'Over' was calculated as 'Under'. That has been resolved.



20.202211.0.0

Release Note • 7/6/2023 • 7 min read

Features

PBI No.	Description
229576	Confict Approval Periodic Condition Journal with other customized workflows and give error(s)

Resolved issues

PBI No.	Description
227935	Periodic Document SPC lines should be included in the functions Get Posted doc lines and similar
228458	Calculation code filter error in conditions rule page
228461	Net% Discount based on recurring min qty calculates UOM wrong
229227	The Condition Customer No. is empty when a new customer is created
231300	wrong classification dimension values/filters while renaming any Dimension value code
232889	Solve Item Charge Assignment for TAX and SPC in the new BC Qty. To Handle field

PBI 229576 - Confict Approval Periodic Condition Journal with other customized workflows and give error(s)

What

Approvals in the Periodic Condition Journal.

Why

As a Sales Manager, you don't want to allow every user to settle periodic conditions. Senior employees should approve them from approval entries before settlements can be executed, so segregation of duties is guaranteed.


As a Purchase Manager, you don't want to allow every user to settle periodic conditions. Senior employees should approve them from approval entries before settlements can be executed, so segregation of duties is guaranteed.




As a small business owner, you don't have any segregation of duties. Approval flows are not needed on periodic conditions, so we can settle them in an efficient way.

How


Enable the workflow

1. Select the Search icon  , enter **Workflows**, and then choose the related link.
2. On the **Workflows** page, choose the **New Workflow from Template** action.
3. On the **Workflow Templates** page, select the **Periodic Journal Batch Approval** Workflow and then choose OK.
4. Adjust the workflow as necessary and select the enabled field.

Setup approvers

5. Select the Search icon  , enter **Approval User Setup**, and then choose the related link.
6. On the **Approval User Setup** page, fill in the (condition) fields as necessary. Hover over a field to read a short description.
7. Periodic Sales Condition Amount
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9. Periodic Purchase Condition Amount
10. Unlimited Periodic Purchase Condition Approval

Send and receive requests

11. Select the Search icon  , enter **Condition Periodic Settlement Journals**, and then choose the related link.
12. On the **Condition Periodic Settlement Journals** page, choose the **Suggest Settlement Lines** action to create lines in the journal.
13. Choose the Approval Request **Send Journal Batch** action to create an approval request for the journal.

See also: [Approve or Reject Documents in Workflows - Business Central | Microsoft Learn](#)

PBI 227935 - Periodic Document SPC lines should be included in the functions Get Posted doc lines and similar

What

Periodic Document SPC lines should be included in the functions Get Posted doc lines and similar.



Why

When sales returns were created with the functions **Get Posted Document Lines to reverse** or **Create Corrective Credit Memo**, and the source document included entries for periodic conditions, these entries were not included in the return. This is solved.

PBI 228458 - Calculation code filter error in conditions rule page

What

it was not possible to set a filter on multiple **Calculation Codes** in the **Sales and Purchase Conditions Rules** page. It would filter on one code only and it could return an error when a code was typed that does not exist. That has been resolved. The field was not always correct. This is solved.

PBI 228461 - Net% Discount based on recurring min qty calculates UOM wrong

What

When a rule was created with a rate based on a recurring minimum (in any UOM), but calculated as Gross%/Net%, the sales- or purchase line did not get the correct price. That has been resolved.

PBI 229227 - The Condition Customer No. is empty when a new customer is created

What

When creating a new customer or vendor field Conditions customer resp. conditions vendor was not filled in certain cases. That has been resolved.

PBI 231300 - wrong classification dimension values/filters while renaming any Dimension value code

What

When a dimension value was renamed (change of the dimension code), the classifications for that dimension were updated incorrect. This is solved.



PBI 232889 - Solve Item Charge Assignment for TAX and SPC in the new BC Qty. To Handle field

What

Solve Item Charge Assignment for TAX and SPC in the new BC Qty. To Handle field

Why

Due to the introduction of the new field Qty. to Handle on the **Item Charge Assignment** page in **Business Central Release 20.7**, the automatic item charge assignment for Drink-IT Tax charges and Drink-IT Sales and Purchase Condition charges had to be adjusted for the new field. This is done.



20.202209.0.0

Release Note • 7/6/2023 • 21 min read

Features

PBI No.	Description
177199	Special sales/purchase prices
178550	Approvals in the Periodic Condition Journal
194192	Mix & Match Promotions
206838	Addition Settlement journal (show/open created documents; auto release documents)
212916	Based on Shipment Method Group and Payment Method Group in Condition rule
213882	Rule (and Calculation) Description field set in multi -language
216146	Not able to use the Search on the Condition Group Relation page
220294	Reverse (periodic) Condition ledger entries
222459	Allow Zero Price rates
223332	Condition Journal based on Indirect sales

Resolved issues

PBI No.	Description
217656	Purchase conditions not calculated for rules with a starting date
221821	Wrong SPC column property (default) in almost Document & Posted Document List extended page type
223333	Periodic Settlement - % based on indirect sales amount
223414	Source No not correct in settlement of Condition ledger entries
223446	Periodic Settlement - G/L Entry already exists error when undoing a purchase receipt & return shipment with condition ledger entry accruals posted to G/L



225257	Condition lines are not calculated with Gross Net Price list and multiple customers
225474	Error on Sending Approval Request for Sales Order Credit Limit Approval Workflow (Order Entry)
225570	Create corrective credit memo error from posted invoice with normal condition & periodic settlement
225620	Missing unit price on promotion items per item
226533	Error when changing the Qty to Ship on a free promotion item line
227265	Not able to post reverse accruals (skipped)
227807	Create settlement document (purchase credit memo) in periodic condition journal uses customer number instead of vendor number
227951	Get Posted doc lines and similar functions - Quantity to receive for SPC lines not ok after change of location
228012	Blocking error (missing General Product Posting Group) on posting the reverse of an accrual in the periodic settlement journal.

PBI 177199 - Special sales/purchase prices

What

Mark a sales- or purchase line with a special price flag, manually or from the price (lines) setup. Define if a condition rule should be calculated over special price lines.

Why

Companies may not give a certain discount or promotion when an item is sold for a very sharp 'special' price.

How

Search for special **sales prices** resp. special **purchase prices** from the item card or else. Check field **Special price**. Create a sales order resp. purchase order where that price is valid. The Special price flag is checked in the line. You may also check/uncheck it manually. Search for **Sales and Purchase Condition calculations**. Set field **Calculate on Special price** to indicate when the rule is valid

- Both: on both lines with and without a special price
- No: only on lines with special price = no
- Yes: only on lines with special price = yes

Release the sales order resp. purchase order. A condition rule is calculated or not depending on it's Condition Calculation code.



PBI 178550 - Approvals in the Periodic Condition Journal

What

Approvals in the Periodic Condition Journal.

Why

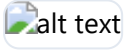
As a Sales Manager, you don't want to allow every user to settle periodic conditions. Senior employees should approve them from approval entries before settlements can be executed, so segregation of duties is guaranteed.

As a Purchase Manager, you don't want to allow every user to settle periodic conditions. Senior employees should approve them from approval entries before settlements can be executed, so segregation of duties is guaranteed.

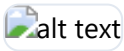
As a small business owner, you don't have any segregation of duties. Approval flows are not needed on periodic conditions, so we can settle them in an efficient way.

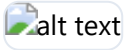
How

Enable the workflow

1. Select the Search icon  , enter **Workflows**, and then choose the related link.
2. On the **Workflows** page, choose the **New Workflow from Template** action.
3. On the **Workflow Templates** page, select the **Periodic Journal Batch Approval Workflow** and then choose **OK**.
4. Adjust the workflow as necessary and select the enabled field.

Setup approvers

5. Select the Search icon  , enter **Approval User Setup**, and then choose the related link.
6. On the **Approval User Setup** page, fill in the (condition) fields as necessary. Hover over a field to read a short description.
 - Periodic Sales Condition Amount
 - Unlimited Periodic Sales Condition Approval
 - Periodic Purchase Condition Amount
 - Unlimited Periodic Purchase Condition Approval

Send and receive requests 3. Select the Search icon  , enter **Condition Periodic Settlement Journals**, and then choose the related link. 4. On the **Condition Periodic Settlement Journals** page, choose the **Suggest**



Settlement Lines action to create lines in the journal. 5. Choose the Approval Request **Send Journal Batch** action to create an approval request for the journal.

See also: [Approve or Reject Documents in Workflows - Business Central | Microsoft Learn](#)

PBI 194192 - Mix & Match Promotions

What

Mix & Match Promotions. A promotion whereby from a list of possible free items it can be selected how much from what item to get for free.

Why

Companies may not always give one item for free on a promotion, but enable a customer to select from a list of items which item he wants for free, even make a mix of different items for free.

How

Search for **Condition calculations**. Create a code with **Calculation Type = Promotion (Free Item)** and **Calculation Period = Order**.

Create a **Condition rule** for a **customer, vendor** or any other **source type** and select the calculation code. Select **item type = Group Item**. Select **Based on item = Group Other**. You can add any other possible criteria.

Open the **Rates**. Set the **Minimum UOM** and **Minimum quantity** for the 'Based on item code'. In field **Free item type** select **Mix & Match**. Fill in the **Free Quantity** and possibly **Recurring** and **Max. Free Quantity**. You **cannot** define a **Free Unit of Measure Code**, as that can be different per selected free item.

Click on action **Edit Free Mix & Match item Rates** or drill down on the Free Item field. Create lines for the **Free items** than can be selected and the **Free Unit of Measure Code**. The **Quantity Per** reflects the relative weight of the free item, the free quantity is multiplied by it for that item For 1 free quantity you can get the qty per of that item for free.

Create a **sales order** or **purchase order** with an item line that meets the minimum condition and **release** the order. A warning comes for the Mix & Match promotions. Click on No and open the **Get Mix & Match promotion** page from the **Notification**. Alternatively you can click on the function **Calculate Drink-it Lines** and then on the function **Get Mix & Match Promotion Lines**.

Select the **free quantity** per line you want, until you consumed the total available free quantity. Close the page with OK and the promotion free item lines are inserted in the order.



PBI 206838 - Addition Settlement journal (show/open created documents; auto release documents)

What

Find the settlement document from the settlement journal.

Why

Users want to find the settlement document, after they created it, to review.

How

From the **Condition Periodic Settlement Journal**, click on Line action **Settlement Documents**.

PBI 212916 - Based on Shipment Method Group and Payment Method Group in Condition rule

What

Condition rules based on a group of shipment methods and based on a group of payment methods.

Why

For rules like delivery charges or pickup discounts the criterion that can be set was the shipment method. However not one shipment method will stand for eg 'delivery'. Companies may define multiple shipment methods (usually created as Incoterms, like CIF, FOB etc) that could serve as criterion.

The same goes for the payment method. Multiple Payment methods could be base for a payment discount (cash payment, card payment, Paypal prepayment).

It is not wanted to create separate rules for each single method code, but to have one for all.

How

A condition rule can now be based on a **Shipment method group** and a **Payment Method Group**.

Search for **Sales and Purchase Condition groups**.

Create a (relation) **Group** of **Type = Shipment Method**, fill the Code and Description. Drill down on the **No. of Shipment methods** field and select shipment methods part of the group. You can also link a shipment method to a group via the **Shipment Methods list page – Related**. Find **Groups** and add the shipment method to one or multiple relation groups.



Create a (relation) **Group** of **Type = Payment Method**, fill the Code and Description. Drill down on the **No. of Payment methods** field and select payment methods part of the group. You can also link a payment method to a group via the **Payment Methods list page – Related**. Find **Groups** and add the payment method to one or multiple relation groups

Open or create a new **Condition Rule**.

Select in field **Based on Shipment Method** the option **Group** and select the Shipment method group in field **Based on Shipment Method Code**.

Select in field **Based on Payment Method** the option **Group** and select the Payment method group in field **Based on Payment Method Code**.

PBI 213882 - Rule (and Calculation) Description field set in multi -language


What

Rule (and Calculation) Description field set in multi-language.

Why

As a beverage company, you can have customers and vendors in multiple language areas. When you setup your condition rules, you want to use one code for each rule, where you have the possibility to add translations for the description, so the documents that you send to your customers and vendors will show the conditions in their own language.

How

1. Select the Search icon  , enter **Sales and Purchase Condition Calculations** (or - **Rules**), and then choose the related link.
2. On the **Sales and Purchase Condition Calculations** (or - **Rules**) page, choose the Translation action.
3. On the **Sales and Purchase Condition Calculations Translations** (or - **Rules**) page, select languages and enter descriptions as necessary.

Note

The translations in documents and printouts depend on the Language Code of the Customer or Vendor.



PBI 216146 - Not able to use the Search on the Condition Group Relation page

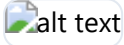
What

Not able to use the Search on the Condition Group Relation page

Why

If your condition group (customer group, item group, etc.) contains a lot of relations, you probably want to be able to search on the page. This is now possible.

How

1. Select the Search icon  , enter **Sales and Purchase Condition Groups**, and then choose the related link., and then choose the related link.
2. On the **Sales and Purchase Condition Groups** page, open the records of a group.
3. On the **Condition Group Relations** page, enter the data you want to search for in the **Search** action.

PBI 220294 - Reverse (periodic) Condition ledger entries

What

Reverse periodic condition ledger entries.

Why

Periodic condition ledger entries may have been posted wrong, because the rule was not defined well then, because an item or customer had wrong dimensions (classifications) or else. It should be possible to reverse selected condition ledger entries before the settlement, so they will not be included.

How

Search for **Condition Ledger Entries**. Find an entry that should be reversed and click on the **Reverse Entry** action. This is possible as long as the entry is open. A **new Conditon Ledger Entry** is created with the same posting date and references, except with an **opposite quantity**. The entry as well as the original entry are **not open** anymore and have a check in field **Reversed**.



PBI 222459 - Allow Zero Price rates

What

Allow Zero Rates for periodic condition rules.

Why

It may be wanted to setup a zero rate (price or percentage) for a periodic condition rule, when it is not clear yet what the final settlement rate will be.

How

Create a **Condition rule**, select a **Classification code** with **Period** other than **Order**. Open the **Rates**, fill in a zero rate and set the Status of the rule to **Certified**.

Post a transaction on which the rule is valid.

Open the **Condition Periodic Settlement journal** and suggest lines for the rule. The line will get a **zero Unit price** and the **Status** is set to **Skipped**. Set the status to **Suggested**, fill in the **Unit price manually** and create the settlement document. You can also decide to leave it skipped and **Post reverse (accruals (Skipped))**.

PBI 223332 - Condition Journal based on Indirect sales

What

Suggest and post condition ledger entries for historic indirect sales entries, that were posted before a rule was certified..

Why

Periodic condition rules may be created and certified after entries were already posted. That was already possible for direct sales, but not for indirect sales.

How

Search for **Condition Journal**. Click on action **Suggest Periodic based on History** and select in option **Suggest entry type** for **Indirect sales** or **All**. Review the journal lines and post them. Condition ledger entries will be posted on the historic posting date, possible accruals will be posted to G/I on the same date or the earliest allowed posting date, in case that date is not allowed anymore.



PBI 217656 - Purchase conditions not calculated for rules with a starting date

What

When a calculation code was setup with **Calculate on Date = Shipment/receipt Date**, a condition with a starting date was never calculated on a purchase order. That has been resolved. When the purchase orders has an Expected Receipt Date that is valid, the condition rule is calculated. When the purchase order has not Exp. Receipt date a rule with a starting date is not calculated.

(Notice that you can now set the default **Exp. Receipt date** to **Workdate** in **Foundation Setup**).

PBI 221821 - Wrong SPC column property (default) in almost Document & Posted Document List extended page type

What

Wrong SPC column property

Why

The condition customer number can be shown on list pages, like the customer list and the sales order list. The display of name of the field was not always correct. This is solved.

PBI 223333 - Periodic Settlement - % based on indirect sales amount

What

When a periodic settlement was suggested for indirect sales based on a percentage, the amount was not calculated well. That has been resolved.

PBI 223414 - Source No not correct in settlement of Condition ledger entries

What

When posting periodic settlement documents (credit memo, invoice) the source no was not registered well in the condition ledger entry. That has been resolved.



PBI 223446 - Periodic Settlement - G/L Entry already exists error when undoing a purchase receipt & return shipment with condition ledger entry accruals posted to G/L

What

Undoing multiple purchase receipt lines with (periodic) condition ledger entries gave an error. That has been resolved.

PBI 225257 - Condition lines are not calculated with Gross Net Price list and multiple customers

What

The gross-net price list did not calculate well when ran for multiple customers, and in cases where an attached line was in a different UOM, like a HL discount on a KEG item. That has been resolved.

PBI 225474 - Error on Sending Approval Request for Sales Order Credit Limit Approval Workflow (Order Entry)

What

Error on Sending Approval Request for Sales Order Credit Limit Approval Workflow (Order Entry)

Why

When you sent an Approval Request for a Credit Limit Approval on a Sales Order, the system gave an error message when order lines were created in the Order Entry page. This is solved.

PBI 225570 - Create corrective credit memo error from posted invoice with normal condition & periodic settlement

What

Correcting a posted sales invoice by the create corrective credit memo or cancel function would result in an error because of attached charge lines. That has been resolved.



PBI 225620 - Missing unit price on promotion items per item

What

in certain cases a promotion free item did not get the unit price. That has been resolved.

PBI 226533 - Error when changing the Qty to Ship on a free promotion item line

What

Free promotion item lines can be inserted on release, based on a condition rule. It should be possible to ship a free item line independent from the item line(s) where it is based upon. It may be shipped later, or earlier, in case one of them is not available yet. That was not possible anymore. That has been resolved.

PBI 227265 - Not able to post reverse accruals (skipped)

What

Not able to post reverse accruals (skipped)

Why

When the minimum target for a periodic bonus is not reached, you still have to reverse the accruals that were already posted. There was a wrong check on the document number in this process that could lead to a blocking error. This is solved.

PBI 227807 - Create settlement document (purchase credit memo) in periodic condition journal uses customer number instead of vendor number

What Create settlement document (purchase credit memo) in periodic condition journal uses customer number instead of vendor number.

Why When you executed the action **Create Settlement Document(s)** in a Condition Periodic Settlement Journal, purchase document was not created when the periodic condition was based on sales to a customer and the number of the customer did not exist as a vendor number. This is solved.



PBI 227951 - Get Posted doc lines and similar functions - Quantity to receive for SPC lines not ok after change of location

What

When a return order was created by the Get Posted document lines to reverse function and you would change the location into a location with warehouse activities, it could lead to a wrong received quantity on attached condition lines, in a certain scenario. That has been resolved.

PBI 228012 - Blocking error (missing General Product Posting Group) on posting the reverse of an accrual in the periodic settlement journal

What

When an item charge code or G/L account does not have a Product Posting group, condition lines inherit it from the item. In case of a periodic settlement with status 'Skip' this would result in an error. That has been resolved, the settlement entry now gets it from the original entries.



20.202207.0.0

Release Note • 7/6/2023 • 5 min read

Features

PBI No.	Description
221806	Periodic Settlement - Summarize options should work for purchase documents as well
221707	Periodic Settlement - Settlement journal not removed in a certain scenario
214889	Wrong settlement quantity to assign calculation when including posted expected return conditions
194193	Combination conditions - promotion and discount
219145	General and VAT product posting group should come from item when the item charge or G/L account does not have a Gen/VAT product posting group

Resolved issues

PBI No.	Description
221703	Periodic Settlement - Based on vendor error
221258	Periodic Settlement - Discount Amount may not be -0.01 error
220272	Suggest condition settlement lines should not check dimensions and relations anymore

PBI 221806 - Periodic Settlement - Summarize options should work for purchase documents as well

What

When creating the settlement document from the settlement journal Line summarize options can be set, but they did not work for the purchase credit memo and purchase invoice. That has been resolved.



PBI 221707 - Periodic Settlement - Settlement journal not removed in a certain scenario

What

When a settlement credit memo or invoice is posted the settlement journal line is removed. In certain cases (quarter bonus settled before the month bonus) that did not happen. That has been resolved.

PBI 214889 - Wrong settlement quantity to assign calculation when including posted expected return conditions

What

When returns were posted through a return order, a periodic settlement document (credit memo, invoice) would not assign (divide) the item charge amount well over the shipments and receipts. That has been resolved.

PBI 194193 - Combination Conditions - promotion and discount

What

Conditions based on a combination of items with minimum quantities.

Why

A condition rule could already be setup based on the minimum of an item group. But it was not possible to define a minimum for one item and another minimum for another item, where the condition is valid if for both items the required minimum was met. In some cases that was required.

How

Create a **Condition Rule** and select **Item type: Per Document** and select in **Based on Item** the option **Combined Items**, which is only available for such 'Per Document' rules.

For combined promotions the rule should have a **Calculation code** with **Calculation type = Promotion (Free (item))**. Open the **Rates** and click **Combined Minimum Quantities** action . Select the **Item No.** for which a minimum applies, select the **Unit of Measure Code (Quantity)** and fill the **Minimum Quantity** for that item. Repeat for each item for which a minimum quantity is in place. In the Rates page, select **Free item type = Item Other** and select the **Free item No.** Fill in **Free Quantity, Max. Free Quantity** and **Free Unit of Measure Code**. Set the **Status** of the **Rule** to **Certified**. Create a **sales order** for a customer to whom the rule applies. Create item lines, including the critical **items** with their required minimum **quantity**. **Release** the order, a line with the **free item** will be added.



For combined discounts the rule should have a **Calculation code** with **Calculation type = Discount** and with **Type = G/L account**. Open the **Rates** and click on action **Combined Minimum Quantities**. Select the **Item No.** for which a minimum applies, select the **Unit of Measure Code (Quantity)** and fill the **Minimum Quantity** for that item. Repeat for each item for which a minimum quantity is in place. In the Rates page fill in the **Rate unit (Gross% or Net%)** or **Rate unit price** (with the **Unit of Measure code (Price)**). Set the **Status** of the Rule to **Certified**. Create a sales order for a customer to whom the rule applies. Create item lines, including the critical items with their required minimum quantity. Release the order, a discount line will be added.

PBI 219145 - General and VAT Product Posting Group should come from Item when the Item Charge or G/L Account does not have a Gen/VAT Product Posting Group

What

An item charge or a G/L account may be setup without a **Gen. Prod. Posting group** and/or **VAT Prod. Posting group**. In orders attached lines will inherit it then from the item line. But that is not the case in **periodic condition settlements**, it would result in an error. That has been resolved. In such cases the settlement document must be created with the **Summarize by Item** option, and lines will inherit it then from the item card.

PBI 221703 - Periodic Settlement - Based on vendor error

What

Suggesting periodic settlement journal lines for a vendor gave an error on the Based on Vendor no. That has been resolved.

PBI 221258 - Periodic Settlement - Discount Amount may not be -0.01 error

What

The Suggest Periodic Journal Lines function could in some cases give a rounding error on the discount amount. That has been resolved.

PBI 220272 - Suggest Condition settlement lines should not check dimensions and relations anymore

What



Condition ledger entries for periodic settlements are calculated in the order or in a condition journal based on rules (classifications, items...). When such an entry exists it should at any time be followed up in the periodic settlement journal. That did not happen in the case a rule was changed in the meantime. That has been corrected.



20.202205.0.0

Release Note • 7/6/2023 • 11 min read

Features

PBI No.	Description
203557	Default position level in calculation
206262	Periodic - Settlement - Percentage discounts calculated on purchase price (based on customer)
208778	Periodic conditions - allow source group when based on source member
214894	Create condition ledger entries from condition rules
216956	Limit the BCA installed check on releasing orders
217780	Update link to SPC online help

Resolved issues

PBI No.	Description
214552	Suggest settlement should ignore the start-ending date of rule setup to filter condition entries
214841	Periodic settlement - Net-Gross% - should always be allocated based on item (sales/purch) amount actual
214850	Periodic settlement - Calendar periods not calculated well
214854	Wrong recurring quantity calculated with promotion (Free item)
214898	Free item type member does not work per item and per document anymore
215033	Periodic settlement net% suggest gives error when two or more date period "on hold" journal lines are calculated (completed invoiced and not) for a rule
216617	Wrong system rule filter when opening the condition rules page
217003	Periodic settlement - Min. amount criterion not calculated well
217142	Dimension classification filters does not work with blank or without using dimension code



217438	Conditions customer's rules are not calculated anymore
217664	Conditions date should be based on exp. receipt date instead of requested receipt date
218046	General and VAT product posting group should come from item when the item charge or G/L account does not have a Gen/VAT product posting group
218167	Periodic settlement journal and conditions jnl do not handle rates per item/UOM well
218330	Periodic settlement - Posting no. series not filled well
218377	Create condition ledger entries from condition rules - missing document type for only purchase-purchase rules
218437	Missing VAT posting group while posting sales/purchase expected condition line
218662	Periodic settlement - wrong quantity in condition ledger entries for over and under minimum rules

PBI 203557 - Default position level in calculation

Why

The **Position Level** of a rule is important in case of net% conditions. When periodic rules have no **Position Level** (just 0), they have an impact on 'on-invoice' net% discounts, that are not expected, nor wanted. It may be forgotten to set the position level well in the rule.

How

The **Position Level** is now be set by default in the 'periodic' calculation codes (20, 30, 40 resp. 50), but can be altered by the user, for periodic, and order codes.

PBI 206262 - Periodic settlement - Percentage discounts calculated on purchase price (based on customer)

What

Periodic settlement from a vendor over sales transactions calculated as a percentage over the unit cost.

Why

For vendor periodic settlements over sales transactions, it was only possible to define a periodic% over the gross or net sales price. In some cases the vendor calculates it over his own (purchase) price.

How



An option has been added to the calculation type field of a calculation code: Cost%, valid only for periodic codes. Such calculation codes can only be selected in rules for vendors (source type) based on sales (based on source type).

PBI 208778 - Periodic conditions - allow source group when based on source member

What

Setup one periodic rule valid for a group of customers (or vendors).

Why

Often a periodic rule applies to multiple customers of a group. Before you had to create a rule per customer, now you can create one rule for a customer group or classification. Same for vendors.

How

In the **Source Type** field select *Classification*, *Group*, or *All customers* (or vendors). In the **Based on Source Type** field, select:

- *Member*: if a minimum is in place based on the customer's own history.
- *Classification/Group*: if a minimum is in place for the group. when met, the customer (or vendor) gets the settlement based on his own history.

Note

When source type is set to customer (or vendor) then the Based on group or classification works differently. Still a possible minimum is calculated for that group, but the settlement is then also based on the total history.

PBI 214894 - Create condition ledger entries from condition rules

What

Create periodic condition ledger entries based on item ledger entries afterwards, from the Condition Journal.

Why

Condition Rules may be created and certified where shipments and receipts were already posted in the valid period. It should be possible to re-created them afterwards.

How



Open the **Condition Journals** page and execute the **Suggest Periodic based on history** action. You can set filters on specific rules. You can also run this function from the condition rule that you just certified. It will set the rule filter automatically then. Post the journal lines. Condition ledger entries will be posted with the historic posting date and document no. Possible accruals will be posted to G/L with the historic posting date, or the first date that is allowed to post from Gen. Ledger Setup.

PBI 216956 - Limit the BCA installed check on releasing orders

What

Limit the BCA installed check on releasing orders.

Why

On the release of a document, the program checks if NORRIQ Business Central Accelerator is installed to verify your global and shortcut dimensions. This check consumed a lot of time in the process.

How

The function that checks the installation is improved and has no impact on the release process anymore.

PBI 217780 - Update link to SPC online help

What

Update link to SPC online help

Why

When you use Drink-IT apps, you might need some assistance and explanation on setup and processes. We make this available in our online help documentation.

How

- Via this link: [Welcome to Aptean Beverage Sales and Purchase Conditions](#)
- When using Drink-IT: On any field or page that is part of the app, choose **Learn more** in the tooltip of the field. This opens the **Help** pane.

PBI 214552 - Suggest settlement should ignore the start-ending date of rule setup to filter condition entries

What



A conditions rule for a periodic settlement may be changed afterwards on the starting date or ending date. In case condition ledger entries already were posted, this would result in an error in the **Condition Periodic Settlement journal**. That has been resolved. It will give now a warning on the rule ID and create the journal line with an **On Hold** flag.

PBI 214841 - Periodic settlement - Net-Gross% - should always be allocated based on item (sales/purch) amount actual

What

When credit memos or invoices are created from the periodic settlement journal with lines of type Charge(item), they should be assigned well over the shipment/receipt lines. For settlements based on the actual sales/purchase amounts (from item/value entries), for quantity settlements based on the (equivalent) quantity by the price UOM (like HL, case, bottle) of the rule/rate. That was not always the case. That is solved.

PBI 214850 - Periodic settlement - Calendar periods not calculated well

What

You can suggest lines in the **Condition Periodic Settlement journal** for multiple periods for the same rule. In certain cases it would suggest a next period too soon. That has been resolved.

PBI 214854 - Wrong Recurring quantity calculated with Promotion (Free item)

What

Promotion (fee item) can be setup per document or for an item group (where the minimum applies to each member or to the group total). When set with a recurring quantity it did not always calculate well. That has been solved.

PBI 214898 - Free Item Type member does not work per item and per document anymore - Remaining Points

What

Condition rules can be set for one item, an item group, but also 'Per document'. The last one means that a discount, charge or promotion free item is only inserted one time, at the end of the order.



In the case of a promotion (free item) you have to specify the free item in the rate. You could select 'Free item type' = Member then, resulting in an error in the sales order. That has been corrected. With a 'Per document' promotion the 'Free item type' must stay Item (other) now.

PBI 215033 - Periodic settlement Net% suggest gives error when 2 or more date period "on hold" journal lines are calculated (completed invoiced and not) for a rule

What

When Net% based periodic settlement journal lines are suggested where some applied entries were not invoiced yet, it will give a warning and the settlement journal line is put on hold because of that (user may overrule it). It would result in an error when that was the case more than once (eg: suggest for month bonus and quarter bonus where both are based on the same not invoiced item ledger entry). That has been resolved.

PBI 216617 - Wrong system rule filter when opening the Condition rules page

What

When opening the condition rules page, a system filter could be applied from a previous time then page was opened, from a settlement journal or else. That has been corrected.

PBI 217003 - Periodic settlement - Min. Amount criterion not calculated well

What

When setting a minimum amount in a rate, the periodic settlement journal would not always recognize well if the minimum was met. That has been corrected.

PBI 217142 - Dimension Classification filters does not work with blank or without using dimension code

What

Condition classifications can be created for items, customers and vendors, based on 10 defined global-shortcut dimensions + 3 item dimensions. When setting filters in any column like " or , x| or x|" it did not calculate well. That



has been resolved.

PBI 217438 - Conditions customer's rules are not calculated anymore

What

A sales or purchase document contains a conditions customer resp. vendor no. (defaulted from the sell-to/buy-from card). The conditions customer/vendor only has an impact on on-invoice conditions (calculation code: by Order). Off-invoice (periodic) rules always calculate for the source (sell-to/buy-from) customer resp. vendor. That did not always work fine. That has been solved.

PBI 217664 - Conditions date should be based on exp. receipt date instead of requested receipt date

What

Calculation codes can be based on the order date or on the shipment/receipt date. When a starting or ending date is set for a conditions rule, it is checking the one or the other. For purchase orders it checked the requested receipt date. That has been changed into the exp. receipt date.

PBI 218046 - General and VAT product posting group should come from item when the item charge or G/L account does not have a Gen/VAT product posting group

What

An item charge or a G/L account may be setup without a **Gen. Prod. Posting group** and/or **VAT Prod. Posting group**. In orders attached lines will inherit it then from the item line. But that is not the case in periodic condition settlements, it would result in an error. That has been resolved. In such cases the settlement document must be created with the **Summarize by Item** option, and lines will inherit it then from the item card.

PBI 218167 - Periodic settlement journal and condition journals do not handle rates per item/UOM well

What

You can now setup for a condition rules multiple rates, set per item unit of measurement (CRATE, KEG..) or per item, where a rate per item has higher priority. In the condition periodic settlement journal and in the condition journals it would give an error for an item because of a missing item unit of measurement (for an item sold in KEG, where it



found a rate for a CRATE). That has been solved. It will find the correct rate per item now, or it will skip an item when no rate was valid for it.

PBI 218330 - Periodic settlement - Posting no. series not filled well

What

No. series for periodic settlement documents can be defined in SPC setup. But the *Posting no. series* was not taken, it always got the posted invoice/credit memo no. series from sales & receivables resp. Purchase & payables setup. That has been corrected.

PBI 218377 - Create condition ledger entries from condition rules - missing document type for only purchase-purchase rules

What

Lines suggested in the conditions periodic settlement journals for vendors did not get a **Document Type**. That is needed to create the purchase invoice or credit memo for the periodic rule. That has been resolved.

PBI 218437 - Missing VAT posting group while posting sales/purchase expected condition line

What

A VAT posting setup error showed when posting a shipment or receipt for which periodic conditions were in place with an accrual posting. Accruals should never post VAT and not bother about a possible missing VAT PPG on the item charge code or G/L account. That has been resolved.

PBI 218662 - Periodic settlement - wrong quantity in condition ledger entries for over and under minimum rules

What

In case periodic rules where setup with calculate minimum = 'Over' resp. 'Under' (Calculation Code) quantity and price were not calculated well. That has been resolved.



18.202111.0.0

Release Note • 7/6/2023 • 3 min read

Features

PBI No.	Description
158972	Set up conditions with in and exclude of members
181646	Register ARC No. on purchase order
183993	Send EMCS on sales shipment
189460	Origin type on customs document and EMCS messages
196347	Send IE810 cancellation message from a customs document
196609	Send IE818 report of receipt from a customs document
202812	Checks on customs documents before processing messages

Resolved issues

PBI No.	Description
177476	Missing fields on the condition ledger entries page
203211	Wrong CDM check when deleting a sales order

PBI 158972 - Set up conditions with in- and exclude of members

On the Sales and Purchase Condition Rules, it is possible to include or exclude customers, ship-to addresses, vendors, order addresses or items for that rule. The setup for this is simplified:

- On the action bar, select **Related** > **Include-Exclude Rules**.
- Select what you want to exclude or include.



PBI 1774 - Register ARC No. on purchase order

On the purchase order lines, it is possible to register the **ARC No.** by selecting a received customs document (IE801).

PBI 183993 - Send EMCS on sales shipment

Send IE815 message to EMCS. It is possible to send EMCS messages from sales shipments.

- A customs document is created that serves as a basis for the message:
 - Manually from the sales shipment
 - Automatically when the shipment is created. This should be set up on the **Customs Document Mgt. Setup** page.
- The message can be:
 - Send to the government platform
 - Manually from the customs document
 - Automatically when the shipment is created. This should be set up on the **Customs Document Mgt. Setup** page.
 - Created as a file
 - Manually from the customs document.

PBI 189460 - Origin type on customs document and EMCS messages

On the **Location Card** page, you can select the **Type of Origin**. on the **Customs Document Management** FastTab, the corresponding field will be filled with this value.

PBI 196347 - Send IE810 cancellation message from a customs document

It is now possible to cancel a IE815 Draft eAD by filling in the cancellation fields on the Customs Document and process the IE810 Cancellation action.

PBI 196609 - Send IE818 Report of receipt from a Customs Document

It is now possible to send the IE818 Report of receipt by filling in the receipt fields on the **Customs Document** page and process the **Report a Receipt IE818** action.



PBI 202812 - Checks on customs documents before processing messages

When a message is communicated to the government platform, the error response is not always clear. To prevent such situations, we have included multiple checks on field values on the **Customs Document** page that are executed before the message is sent.

PBI 177476 - Missing fields on the condition ledger entries page

Missing fields on the **Condition Ledger Entries (Sales and Purchase)** page.

PBI 203211 - Wrong CDM check when deleting a sales order

Wrong CDM check when deleting a sales order.



Introduction

Article • 7/6/2023 • 1 min read

The Aptean Beverage Sales-Purchase Conditions (SPC) extension, Drink-IT Edition, is about agreements with customers and vendors that go further than just prices and line discounts.

On Invoice: Prices, discounts and charges calculated in various ways, based on various criteria, in multiple cascading levels.

Off invoice: a bonus at the end of a month, quarter or year when a target is reached, or the opposite when a minimum is not met. Accruals foreseen for such.

Free products: earn free products based on minimum criteria, introduce new products, include promised POS items in your regular order intake.

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](#)
- [Create your own demo company](#)
- [Setting up sales-purchase conditions](#)
- [Training](#)
- [Business process walkthroughs](#)



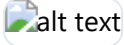
Create your own demo company

Article • 2/7/2025 • 4 min read

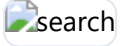
Aptean Beverage is available in multiple countries. For each country, a dedicated demo company is available. This country specific company contains setup that is specific for that country (VAT, excises, language, etc.). They are all based on the Business Central cronus company for that country. With 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. In the Search box, enter **Aptean Beverage Drink-IT Edition**.
3. Select the Bundle that meets your business requirements.
4. Choose 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 demo company can differ from the ones used in the walkthroughs. Since the Aptean Beverage 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 sales purchase conditions

Article • 6/17/2024 • 2 min read

Overview

Before you can start using Aptean Beverage Sales and Purchase Conditions 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	Manage permission sets
Define general business rules for your sales and purchase conditions	Sales and Purchase Condition Setup
Use a price unit of measure for items	Setup a Price Unit of Measure for Items
Use reason codes to define allowed price changes and reasons for free products	Setting Up Reason Codes
Use dimensions to define classifications for your customers, vendors and items	Setting Up Sales and Purchase Classifications
Define condition groups classify your customers, vendors, items, locations and reason codes	Setting Up Sales and Purchase Groups
Create calculation codes that define your conditions for sales and purchase	Setting Up Sales and Purchase Condition Calculations



<p>Define the rules that express how your calculation codes are applied in sales and purchase processes</p>	<p>Setting Up Sales and Purchase Condition Rules</p>
<p>Connect rates that express values and minimum - and maximum conditions to your rules</p>	<p>Setting Up Sales and Purchase Condition Rates</p>
<p>Round up the charges for the equivalent Units of Measure</p>	<p>Setting Up Rounding for Condition Rates</p>
<p>Setup customers for sales and purchase conditions</p>	<p>Setting Up Customers for Sales and Purchase Conditions</p>
<p>Setup vendors for sales and purchase conditions</p>	<p>Setting Up Vendors for Sales and Purchase Conditions</p>
<p>Setup global dimensions</p>	<p>Setting Up Global dimensions</p>
<p>Setup reason codes groups</p>	<p>Setting Up Reason Codes Group</p>



Manage permission sets

Article • 10/25/2024 • 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 *SLSPURCHCOND105FDW*.

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 *SLSPURCHCONDB105FDW*.

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 Apteau Beverage Sales Purchase Conditions extension, ensuring secure and role-based access.




Sales and purchase condition setup

Article • 4/5/2024 • 2 min read

Sales and Purchase Condition Setup

In the Sales and Purchase Condition Setup, you can define your policy for:

- Accrual posting: when periodic discounts, charges or promotions are in place.
- Reason Codes: when you want to force users to fill in a reason for price changes or line discounts in sales and purchase documents.
- Number Series in settlement documents for periodic discounts, charges or promotions.
- Select the Search icon  , enter **Sales and Purchase Condition Setup**, and then choose the related link.
- On the **Sales and Purchase Condition Setup** page, fill in the fields as necessary. Hover over a field to read a short description.


On the **Sales and Purchase Condition Setup** page, when the **Copy translations to Condition Rules** toggle is turned on, the **Sales and Purchase Calculation** then inherits the setup. This can differ from the general setup and control, if on the **Sales and Purchase Condition Rule Card** page the **Language Code** inherits the value from the **Language Code** added on the **Sales and Purchase Condition Calculation Translations** page.



Setup a price unit of measure for items.

Article • 1/16/2024 • 3 min read

Sales prices can be recorded in the Sales Prices window. In this window, you can select a Unit of Measure Code. It will serve as a criterium for the price that you have entered in the record. It will only be applied on sales lines with that unit. When the sales line is created with another unit, the recorded price will not be used.

In Aptean Beverage Sales-Purchase Conditions, you can define a price calculation unit of measure. Prices will always be calculated according the price that was setup for that unit, where it takes the ratio from the Item Unit of Measure in account (Qty. per Unit of Measure). 1. Select the Search icon , enter **Items**, and then choose the related link. 2. Open the card of the item for which you want to set up the price calculation unit. 3. On the **Item Conditions** FastTab, in the **Price Calc. Unit of Measure** field, select a desired value. 4. On the action bar, select **Special Sales Prices & Discounts > Sales Prices**. The **Price List Lines** page opens. 5. In the **Unit of Measure Code (custom)** field, select the value.

See also

[How to Set Up Item Units of Measure - Business Central | Microsoft Docs](#)




Setting up reason codes

Article • 7/6/2023 • 3 min read

Reason codes are used to indicate why an entry was created. When you set up reason codes, you can assign them to entire journal templates and journal batches, and you can assign them to individual journal lines and documents. Aptean Beverage apps make use of reason codes. In Aptean Beverage Tax Management, you can for instance define that a (return) shipment of excise goods from or to a tax warehouse is only allowed for a specific reason.

In Aptean Beverage Sales-Purchase Conditions, reason codes can be used:

- To explain why a price is changed in a sales or purchase document
- To explain why a line discount was given in a sales or purchase document
- To serve as a criterium for a condition, like a discount is only given on the sales of a product when reason X is applicable
- Select the Search icon  , enter **Reason Codes**, and then choose the related link. The **Reason Codes** list page opens.
- On the action bar, select **Related** > **Card** to open the **Reason Code** Card.
- Choose the plus sign (+) at the top of the card to create a new entry.
- On the **General** FastTab, fill in the **Code** and **Description** fields.
- On the **Sales and Purchase Conditions** FastTab, fill in the fields as necessary. Hover over a field to read a short description.

See also

[Update Foundation Reason Codes](#)



Setting up sales and purchase classifications

Article • 7/6/2023 • 3 min read

Sales and purchase classifications are very powerful to group your customers, vendors and items. The classification groups that you create are based on the dimension settings on the master data. Which means that once the classification groups are created, and the master data has the proper dimension setup, it is automatically part of that group.


A classification group can be specified by the use of:

- Eight global dimension configured on the **General Ledger Setup** page.
- Three item dimension, enabled by [Aptean Beverage Foundation Management](#).

All these dimensions are shown as (filter) columns in the Sales and Purchase Condition Classifications page. In these columns you can:

- Select a dimension value by using the dropdown.
- Select multiple dimension values by using the AssistEdit button.
- Use [filter criteria](#) to define more complex filters on dimension values.

You can combine multiple dimensions in one classification code. As an example, you can specify **Brand Codes** with **Packaging Type Codes** to define **Own Beers** (Brand Dimension) **in Bottle** (Packaging Type Dimension).

1. Select the Search icon , enter **Sales and Purchase Condition Classifications**, and then choose the related link.
2. On the action bar, select **New**.
3. Fill in the fields as necessary. Hover over a field to read a short description.



Setting up sales and purchase groups

Article • 7/6/2023 • 2 min read

As an alternative for the sales and purchase classifications, or in addition to them, you can also define condition groups. You can create groups for:


- Customers
- Vendors
- Items
- Locations
- Reasons
- Item Categories
- Consumption Unit of Measures

These groups can be used in [Sales and Purchase Condition Rules](#)

Note

Best practice for groups of the customer, vendor or item type is to group them by the use classification groups. Classifications are easier to maintain and have a better performance on your transactions.

If you still prefer groups over classifications: prevent groups with a large number of members for performance reasons.

1. Select the Search icon  , enter **Sales and Purchase Condition Groups**, and then choose the related link.
2. On the action bar, select **New**.
3. Fill in the fields as necessary. Hover over a field to read a short description.
4. Select the value in the respective field.
The **Condition Groups Relation** page opens. This provides the details of the associated customers, vendors, locations, reasons, item categories, or consumption unit of measures for a group.
5. Choose the **New** action to add entries to the group.




Setting up sales and purchase condition calculations

Article • 7/2/2025 • 3 min read

The Sales and Purchase Calculation codes represent the type of conditions that are applicable in your company. These conditions can be:

- **Price** discounts or charges (amount per unit); on invoice or periodic.
- **Fixed Price** discounts or charges (amount per item or document); on invoice or periodic
- **Gross %** discounts or charges (a percentage calculated on the price of products); on invoice or periodic.
- **Net %** discounts or charges (a percentage calculated on the price of products minus other discounts or charges); on invoice or periodic.
- **Promotions (Discount)** (buy quantity X get quantity y); on invoice
- **Promotions (Free Item)** (buy product A, get product B for free); on invoice.

The calculation codes only represent your type of conditions. They don't include the rules that explain how and when they are applied, or what the amount or percentage is that should be applied. These parts of the setup are done in the [Condition Rules](#) and [Condition Rates](#). One condition calculation code can have multiple condition rules.

1. Select the Search icon , enter **Sales and Purchase Condition Calculations**, and then choose the related link. The **Sales and Purchase Condition Calculations** page opens.
2. On the action bar, select **New**.
3. Enter the required information in the fields.
4. Select the **Use Calendar Period** checkbox to specify that the periodic condition should end on the last day of the calendar period. When the **Use Calendar Period** checkbox is cleared, the calculation is based on the **Starting Date** field value on the **Sales and Purchase Condition Rule** page. The **Suggest Periodic Journal Lines** action on the **Condition Periodic Settlement Journals** page generates lines according to the **Calculation Period Type** field value defined on the **Sales and Purchase Condition Calculations** page, even if no starting date is specified in the sales and purchase condition rule.
5. Select the **Ignore Item Line Discount** checkbox to exclude the line discount applied to the item from the net percentage discount calculation. This checkbox is editable only when the **Calculation Method Type** field value is set to *Net%* and the **Calculation Period Type** field value is set to *Order*.

Note

You can select the *Period* option in the **Calculation Period Type** field to define calculation periods based on predefined accounting periods from the **Accounting Periods** page.


Hover over a field to read a short description.



Setting up sales and purchase condition rules

Article • 7/2/2025 • 5 min read

In the Sales and Purchase Condition rules, you define:

- Who will get, or, from who will you receive, a discount, charge, or promotion
- What are the conditions to apply the discount, charge, or promotion
- Select the Search icon , enter **Sales and Purchase Condition Rules**, and then choose the related link.
- On the action bar, select **New**.
- Fill in the fields as necessary. Hover over a field to read a short description.

General FastTab

On the **General** FastTab, you define the general characteristics of the rule, like a description that will be included in your sales documents.

Customer/Vendor (Source)

On the **Customer/Vendor (Source)** FastTab, you define the source(s) for the rule; your customer(s), or vendor(s). A rule can define a condition (discount, charge or promotion) for:

- Customer(s) condition for sales to the same customer(s):
 - **Based on Source Type** = *Member*
- Customer(s) condition for sales to other customer(s):
 - **Based on Source Type** = *Customer Other, Customer Classification Other, or Customer Group Other*
- Vendor(s) condition for purchases from the same vendor(s):
 - **Based on Source Type** = *Member*
- Vendor(s) condition for sales to other vendor(s):
 - **Based on Source Type** = *Vendor Other, Vendor Classification Other, or Vendor Group Other*
- Vendor(s) condition for sales to customer(s):
 - **Based on Source Type** = *Customer Other, Customer Classification Other, or Customer Group Other*

You can use the **Based on Condition Customer/Vendor No.** toggle to control whether the system should evaluate and settle condition rules using the **Condition Customer No.** or **Condition Vendor No.** field values specified on the **Customer Card** or **Vendor Card** page.



In addition, you can define conditions based on fields on the Customer/Vendor Card:

- **Payment Method:** the rule will only be applied on customers or vendors with that method.
- **Ship-to Address:** the rule will only be applied on transactions to that shipping address or order address.

Or set a dedicated Payment Method in the transaction when the rule is applied in the Payment Method Code field.

And, when groups of customers or vendors are defined, you can include customers or vendors that are not in that group, or exclude certain customers or vendors even though they are in the group.

Item

On the **Item** FastTab, you define the product(s) for the rule; the items where the condition is calculated on:

- A specific item, an item classification, a group of items, or all items where the condition is applicable on,
- The same item, item classification, group of items or all items.
 - **Based on Item Type = Member**
- An other item, item classification, group of items or all items.
 - **Based on Item Type = Item Other, Classification Other, Group Other or All Items.**

In addition, you can define conditions based on fields on the Item Card:

- **Item Category:** the rule will only be applied on items with that category.
- **Consumption Unit:** the rule will only be applied on items with that consumption unit.

And, when groups of items are defined, you can include items that are not in that group, or exclude certain items even though they are in the group.

Others FastTab

On the **Others** FastTab, you can define additional criteria for the rule:

- The Location(s) where the goods are shipped from of received in.
- The Shipment Method for the transaction.
- The Reason for the transaction.

Or set a dedicated Location or Reason in the transaction when the rule is applied in the **Location Code** or **Reason Code** field.



 Note

Even when the period for a periodical condition that you are setting up has already started, you are still able to settle that condition with your customers and vendors for the whole period. For more information, see the [Walkthrough: Create Condition Ledger Entries from history](#).



Setting up sales and purchase condition rates

Article • 3/25/2025 • 2 min read

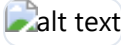
In the Condition Rates, you define:

- the starting and ending date for the condition (not mandatory)
- the minimum or maximum criteria for the condition (not mandatory)
- the percentage or the amount for the condition (mandatory).
- the details for free (promotion) items.

The system allows you to add multiple sales and purchase condition rates for a single rule with rates based on minimum and maximum amounts specified on the **Sales and Purchase Condition Rates** page.

Note

When a rule is setup with **Based on Member (Item)**, it is possible to specify rates for individual items that are member of the (classification) group by selecting an item in the **Item No.** field.

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
The **Sales and Purchase Condition Rules** list page opens.
2. Navigate to the desired line.
The **Sales and Purchase Condition Rates** page opens.
3. Fill in the fields as necessary. Hover over a field to read a short description.

To know about the setting up of rounding for condition rates, see [Setting Up Rounding for Condition Rates](#).



Setting up rounding for condition rates

Article • 4/29/2025 • 2 min read

On the **Sales and Purchase Condition Rule Card** page, on the **Rates** FastTab, the charges for equivalent Units of Measure can be rounded up using the following **Rounding Method Type (Quantity)** field options:

- *Nearest*: The rounding will not take place.
- *Up*: Always round up to the next whole number.
- *Down*: Always round down to the previous whole number.

Note

The rounding is only applicable for the calculation codes (charge price, disc price etc) and it is not applicable for promotion free (promotion free, promotion mix etc).

For non-recurring rates, the default value of the **Rounding Method Type (Quantity)** field is:

- Blank for order-based discounts and charges, and periodic conditions.
- *Down* for promotions (free and discount).
You can manually change the default rounding type.

The system allows you to change the rounding method even when the **Calculation Minimum Type** field value is not blank on the **Sales and Purchase Condition Calculations** page.

When the **Calculation Minimum Type** field is blank:

- For discounts, the **Rounding Method Type (Quantity)** field value defaults to *Down* when the **Recurring** checkbox is selected.
- For charges, the **Rounding Method Type (Quantity)** field value defaults to *Up* when the **Recurring** checkbox is selected.

For recurring rates, the default value of the **Rounding Method Type (Quantity)** field is:

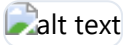
- *Down* for order-based discounts and promotions (free and Discount).
- *Up* for order-based charges.
- Blank for periodic conditions.



Setting up customers for sales and purchase conditions

Article • 7/6/2023 • 3 min read

By default, conditions (prices, discounts, charges, promotions) on sales documents are calculated according to the setup of the **Bill-to Customer** on the document. But you might have agreements with individual customers where you want to deviate from this standard. In Aptean Beverage Sales and Purchase Conditions, the conditions that will be applied for customers can also come from the **Sell-to Customer**, or an **Other Customer**.

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 up the condition customer.
3. On the **Sales Conditions** FastTab, fill in the fields as necessary. Hover over a field to read a short description.

If you want to view which condition rules are applicable for a customer, then you can view them from the customer list and card page:

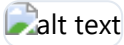
4. On the action bar, select **Related** > **Sales and Conditions** > **Customer Rules** to view condition rules that are create for condition customer on the customer card.
5. Select **Related** > **Sales and Conditions** > **Customer Rules Overview** to view all condition rules that are applicable for condition customer card. It includes all rules for groups where the condition customer is a member.



Setting up vendors for sales and purchase conditions

Article • 7/6/2023 • 3 min read

By default, conditions (prices, discounts, charges, promotions) on purchase documents are calculated according to the setup of the **Pay-to Vendor** on the document. But you might have agreements with individual vendors where you want to deviate from this standard. In Apteau Beverage Sales-Purchase Conditions, the conditions that will be applied for vendors can also come from the **Buy-from Vendor**, or an **Other Vendor**.

1. Select the Search icon  , enter **Vendors**, and then choose the related link.
2. Open the card of the Vendor for which you want to set up the condition Vendor.
3. On the **Purchase Conditions** FastTab, fill in the fields as necessary. Hover over a field to read a short description.

If you want to view which condition rules are applicable for a Vendor, then you can view them from the Vendor list and card page:

4. On the action bar, select **Related** > **Purchase and Conditions** > **Vendor Rules** to view condition rules that are created for condition Vendor on the Vendor card.
5. Select **Related** > **Purchase and Conditions** > **Vendor Rules Overview** to view all condition rules that are applicable for condition Vendor card. It includes all rules for groups where the condition Vendor is a member.



Setting up Global dimensions

Article • 7/6/2023 • 1 min read

The Global dimension codes will facilitate the classification on totals for the different dimension combinations defined for a classification. 10 global dimensions will add transparency for the user.

Enabled by BCA , you can define 10 global dimension, via the General ledger setup and function Change Global-Shortcut dimensions.



Training

Article • 6/19/2024 • 2 min read

This selection of exercises will help you to get a better understanding of the Aptean Beverage Sales and Purchase Conditions extension. 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.

Create yourself as a 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.

Following field is by default not visible in the pages, for this exercise we advice you to add them in the sales order line (sub) page, for direct background information on calculated conditions.

- Search for Sales orders. Open an order.
- Click Personalisation (via My Settings).
- Select a line in the order.
- Click the personalisation bar on fields.
- Search for Condition Line.
- Move the field to the lines page, right of the Total Amount column.

To	See
Exercise 1 - Master Data	Master Data
Exercise 2 – On Invoice Discounts & Charges	On Invoice Discounts & Charges
Exercise 3 – On Invoice Promotions	On Invoice Promotions
Exercise 4 – Off Invoice Discounts & Charges	Off Invoice Discounts & Charges planning nos
Exercise 5 – Miscellaneous	Miscellaneous



Exercise 6 – Relation with other apps

[Relation with other apps](#)



Master data

Article • 7/6/2023 • 9 min read

This exercise will help you to get a better understanding of the Apteau Beverage Sales-Purchase Conditions extension. 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 1 - Master data

Dimensions

Search for **Dimensions**.

Enter the **VENDOR** Code and add a dimension value

- **Code:** your NAME_VENDOR
- **Description:** your Name Vendor

Search for **Dimensions**.

Enter the **BUSINESS GROUP** Code and add a dimension value

- **Code:** your NAME_GROUP
- **Description:** your Name Customer Bus. group

Classifications

Search for **Sales and Purchase Condition Classifications**.

Create a new classification

- **Type:** Customer
- **Code:** your NAME_RETAIL
- **Description:** your NAME Retail customers
- Set the filter on customer group 'retail'



 **Note**

In the dimension matrix you see 13 columns with 10 'global' dimensions defined by BC/BCA in the **General Ledger Setup** and 3 'global' item dimensions defined in **Foundation Setup**.

Create a **new** classification

- **Type:** Customer
- **Code:** your NAME_GRPPUB
- **Description:** Pubs owned by your NAME Group
- Set the filter on
 - Business group: your 'NAME_GROUP'
 - customer group 'pubs'

Create a **new** classification

- **Type:** Item
- **Code:** your NAME_VEND
- **Description:** your NAME producer items
- Set the filter on items from Vendor Code : your NAME

Create a **new** classification

- **Type:** Item
- **Code:** your NAME_BEER
- **Description:** your NAME all beers
- Set the filter on items
 - Brand: all beers

Create a **new** classification

- **Type:** Item
- **Code:** your NAME_BBTL
- **Description:** your NAME all beers sold in bottle
- Set the filter on items
 - Brand: all beers
 - Packtype: all bottles

Condition groups



For those cases where a classification based on dimension is not possible, you can create condition groups.

Search for Sale and Purchase Condition Groups

Create a **new** group

- **Type:** Customer
- **Code:** your NAME_EMPL
- **Description:** Employee conditions from your NAME

Calculation Codes

Search for Sales and Purchase Condition Calculations

Create a **new** Calculation Code

- **Code:** your NAME_MNET
- **Description:** your NAME Month discount Net%
- **Type/No.:** select the item charge code for periodic discounts
- **Calculation type:** Discount
- **Calculate on Special Price;** Both
- **Calculation Method:** Net%
- **Calculation Period:** Month (anything other than 'Order' is a periodic 'off-invoice' settlement)
- **Post Accrual to G/L:** yes
- **Based on Reason (sales):** select the reason group SALES (the discount should only be calculated over normal sales transactions, not over free items, not include 3rd party settlements)
- **Based on Reason (purchase):** select the reason group PURCHASE

Create another Calculation Code

- **Code:** your NAME_MBONUS
- **Description:** your NAME Month HL Bonus
- **Type/No.:** select the item charge code for periodic discounts
- **Calculation type:** Discount
- **Calculate on Special Price;** Both
- **Calculation Method:** Price
- **Calculation Minimum:** Over
- **Calculation Period:** Month (anything other than 'Order' is a periodic 'off-invoice' settlement)
- **Post Accrual to G/L:** No



Sales-Purchase Conditions for Drink-IT

- Based on Reason (sales): select the reason group SALES (the discount should only be calculated over normal sales transactions, not over free items, not include 3rd party settlements)
- Based on Reason (purchase): select the reason group PURCHASE

Create another Calculation Code

- Code: your NAME_MMALUS
- Description: your NAME Month HL Malus
- Type/No.: select the item charge code for periodic charges
- Calculation type: Charge
- Calculate on Special Price; Both
- Calculation Method: Price
- Calculation Minimum: Under
- Calculation Period: Month (anything other than 'Order' is a periodic 'off-invoice' settlement)
- Post Accrual to G/L: No
- Based on Reason (sales): select the reason group SALES (the discount should only be calculated over normal sales transactions, not over free items, not include 3rd party settlements)
- Based on Reason (purchase): select the reason group PURCHASE

Customers

Search for **Customers**.

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

- Apply template Customers domestic (tax paid)
- **General** FastTab
 - Name: Your NAME1 (Retail)
- **Address & Contact** FastTab
 - City: Birmingham
- **Invoicing** FastTab
 - Customer Price Group RETAIL
- **Payments** FastTab
 - Payment Method: the customer pays by bank transfer;
 - Payment Terms: after 14 days
- **Logistics** FastTab
 - Route: select your route (NAME_ROUTE1) or route 1300



- **Dimensions** FastTab
 - Customer group/Channel: Retail
 - Business Group: your NAME_GROUP

In case Empty Good Management is installed and deposit is charged

- **Empty Goods** FastTab
 - 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.,

 **Note**

On the **Dimensions** FastTab, you see part of the 'global' 10 dimensions defined by BC/BCA in the **General Ledger Setup** resp. **Business Central Accelerator Setup**. and 3 'global' item dimensions defined in **Foundation Setup**.

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

- Apply template Customers domestic (tax paid)
- **General** FastTab
 - Name: Your NAME2 (Pub)
- **Address & Contact** FastTab
 - City: Birmingham
- **Invoicing** FastTab
 - Customer Price Group PREM
- **Payments** FastTab
 - Payment Method: the customer pays by CASH
 - Payment Terms: after OD (Cash on delivery)
- **Logistics** FastTab
 - Route: select your route (NAME_ROUTE1) or route 1300
 - **Dimensions** FastTab
 - Customer group/Channel: Pubs
 - Business Group: your NAME_GROUP

In case Empty Good Management is installed and deposit is charged



- **Empty Goods** FastTab

- 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.

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

- Apply template Customers domestic (tax paid)

- **General** FastTab

- Name: Your NAME3 (Pub)

- **Address & Contact** FastTab

- City: Birmingham

- **Invoicing** FastTab

- Customer Price Group PREM

- **Payments** FastTab

- Payment Method: the customer pays by CASH
- Payment Terms: after 0D (Cash on delivery)

- **Logistics** FastTab

- Route: select your route (NAME_ROUTE1) or route 1300
- **Dimensions** FastTab
- Customer group/Channel: Pubs
- Business Group: your NAME_GROUP

In case Empty Good Management is installed and deposit is charged

- **Empty Goods** FastTab

- 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.

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

- Apply template Customers domestic (tax paid)

- **General** FastTab

- Name: Your NAME4 (Retail+Owner)



- **Address & Contact** FastTab
 - City: Birmingham
- **Invoicing** FastTab
 - Customer Price Group RETAIL
- **Payments** FastTab
 - Payment Method: the customer pays by bank transfer;
 - Payment Terms: after 14 days
 - **Dimensions** FastTab
 - Customer group/Channel: Retail
 - Business Group: your NAME_GROUP

Vendor

Search for **Vendors**.

Create a new Vendor by the **New** action

- Apply template Vendors domestic
- **General** FastTab
 - Name: Your NAME1
- **Address & Contact** FastTab
 - City: Birmingham
- **Invoicing** FastTab
 - Customer Price Group RETAIL
- **Payments** FastTab
 - Payment Method: we pay the vendor by a SEPA bank transfer
 - Payment Terms: after 14 days
- **Logistics** FastTab
 - Route: select your route (NAME_ROUTE2) *In case Empty Good Management is installed and deposit is charged*
- **Empty Goods** FastTab
 - Empty Good Business Group: empty goods are traced and deposit is charged, within the same invoice. Select DEP.

Items



Search for **Items**

Create a new item

- Apply template Trade beer
- **General** FastTab
 - 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.
- **Foundation** FastTab
 - 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
 - Dimensions
 - Itembrand: select DIT UK Beers
 - Item Packtype: Bottle, returnable
 - Item packsize: 50 CL
- **Dimension** FastTab
 - Vendor Code: select your NAME
- View the item unit of measurements
- Select action Special Prices & Discounts – Sales Prices and setup gross prices
 - Customer Price Group RETAIL: 24,00
 - Customer Price Group: PREM: 25,00
 - Customer Price Group: WHOLESAL: 15,00
 - All Customers: 35,00

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

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



 Note

On the **Foundation** FastTab you find 3 'global' item dimensions defined in **Foundation Setup**. On the **Dimensions** FastTab you see part of the 'global' 10 dimensions defined by BC/BCA in the **General Ledger Setup** resp. **Business Central Accelerator Setup**.

Create another **new** item

- Apply template Trade beer
- **General** FastTab
 - 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.
- **Foundation** FastTab
 - 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).
 - Dimensions
 - Itembrand: select DIT UK Beers
 - Item Packtype: Can, one-way
 - Item packsize: 33 CL
- **Dimensions** FastTab
 - Vendor Code: select your NAME
- View the item unit of measurements
- Select **Special Sales Prices & Discounts** > **Sales Prices** on the action bar and setup gross prices.
 - Customer Price Group RETAIL: 5,00
 - Customer Price Group: PREM: 6,00
 - Customer Price Group: WHOLESALE: 4,00
 - All Customers: 7,00

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



Create another **new** item

- Apply template Finished products beer
- **General** FastTab
 - Description: your 'NAME Beer CRONUS Premium Bottle 6x33CL'
 - Base Unit of Measure: select TRAY; confirm. By default the Sales UOM (FT Prices & Sales) and Purchase UOM (FT Replenishment) are the same.
- **Foundation** FastTab
 - Volume is 1,98 (L)
 - Net weight: 1,98 (KG)
 - Gross weight: 3,1 (KG) (volume + packaging; tray,can)
 - The Consumption UOM is BOTTLE and 6 bottles 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).
 - Dimensions
 - Itembrand: select Cronus Premium
 - Item Packtype: bottle, one-way
 - Item packsize: 33 CL
- **Dimensions** FastTab
 - Vendor Code: leave blank, this is an own produced item by the Cronus company.
- Select **Special Sales Prices & Discounts** > **Sales Prices** on the action bar and setup gross prices.
 - Customer Price Group RETAIL: 4,00
 - Customer Price Group: PREM: 5,00
 - Customer Price Group: WHOLESALE: 3,00
 - All Customers: 6,00

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

Locations

The exercises are based on the location BLUE_TP, which does not contain warehouse activities.



On invoice discounts & charges

Article • 7/6/2023 • 12 min read

This exercise will help you to get a better understanding of the Apteau Beverage Sales-Purchase Conditions extension. 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 – On invoice discounts & charges

Small order surcharge

Search for **Customers**. Select your customer NAME1

- Select **Customer Rules** action and create a new rule
 - Source type/No: your customer NAME1
 - Item type: Per Document
 - Calculation Code: select CHAR_FIX
 - Description: Order (<250,-) surcharge 7,50
 - Based on Source: Member (=customer self)
 - Based on Item type: All items (is fixed)
 - Direction of Movement: Outbound (you will not charge this for returns)
 - Starting date: 01-01-22
 - Drill down on the **No. of Rates** field and create a new Rate
 - Maximum Amount: 240,99
 - Rate Unit (Fixed Price): 7,50
 - Unit of Measure (Price): select GBP (assuming that represents your local currency code)
 - Back in the rule: set **Status** to Certified

Search for **Sales orders**.

- Create a new order for your customer NAME1. * Create lines of type = Item
- Your item NAME Beer Crate 20x50CL: 2 CRATES
- Your item NAME Beer Can 6x33CL: 10 TRAYS



- Release the order. Notice the surcharge
- Reopen the order. Change the quantities
 - Your item NAME Beer Crate 20x50CL: 20 CRATES
 - Your item NAME Beer Can 6x33CL: 80 TRAYS
- Release the order. No surcharge is calculated.

Discount per Item

Search for **Customers**. Select your customer NAME1

- Select Customer Rules action and create a new rule
 - Source type/No: your customer NAME1
 - Item type/Code: Calculation Code ALL beverages
 - Calculation Code: select DISC_PRICE
 - Description: Item discount per unit
 - Based on Source: Member (=customer self)
 - Based on Item type: Member (separate rate for each member of the item group)
 - Direction of Movement: Both
 - Based on reason Code: select group SALES
 - Starting date: 01-01-22
 - Drill down on the No. of Rates field and
 - create a new Rate
 - Rate Unit (Price): 0,50
 - Item no: your item NAME Beer Crate 20x50CL
 - Unit of Measure (Price): CRATE
 - create another Rate
 - Rate Unit (Price): 0,10
 - Item no: your item NAME Beer Can 6x33CL
 - Unit of Measure (Price): TRAY
 - create another Rate
 - Rate Unit (Price): 0,08
 - Unit of Measure (Price): TRAY
 - Back in the rule: set Status to Certified

Search for **Sales orders**.



Select the sales order for your customer NAME1.

- Reopen the order. Change the quantities
 - Your item NAME Beer Crate 20x50CL: 10 CRATES
 - Your item NAME Beer Can 6x33CL: 10 TRAYS
 - Your item NAME Beer CRONUS Premium Bottle 6x33CL: 10 TRAYS
- Release the order. Expand the lines and explain the attached condition lines

 Note

The **Reason code** is a criterion in sales and purchase conditions. You can define a default reason code for all sales and purchase document types in **Foundation Setup**, FastTab **Default Reason Codes**. This is especially relevant for conditions calculated as a price per unit. As we will see in the training **On Invoice Promotions** the reason code will trigger a 100% line discount over promotions (free item lines). Most probably you will not calculate a discount over a free item. With fields **Based on Reason Code/Group** you can exclude them for a rule.

Discount per Bottle

All RETAIL customers get this week a discount of 0,05 per bottle, over all beers sold in bottle, when they order a minimum of 100 bottles.

Search for **Sales and Purchase Condition Classifications**.

- Select your NAME_RETAIL. Select Rules action and create a new rule
 - Source type/No: your customer classification NAME_RETAIL
 - Item type/Code: your item classification NAME_BBTL
 - Calculation Code: select DISC_PRICE
 - Description: Campaign 0,05 discount per bottle of beer
 - Based on Source: Member (each customer/member of this group)
 - Based on Item type: Member (each item member of the group)
 - Direction of Movement: Both
 - Based on Reason: group SALES (default from calculation code; this discount is not given on free items)
 - Starting date: the Monday of current week
 - Ending date: the Friday of current week
 - Drill down on the **No. of Rates** field and create a new Rate
 - Unit of Measure Code (Quantity): BOTTLE
 - Minimum Quantity: 100



- Rate Unit (Price): 0,05
- Unit of Measure (Price): select BOTTLE
- Back in the rule: set Status to Certified

Note

Whether this week applies to the **order date** or the **shipment date** is set on the **Sales and Purchase Condition Calculation code**, in field **Calculation on Date (Document)**. This only applies to 'on invoice' conditions (**Calculation Period = Order**). Off-invoice conditions always relate to the posting date of the entry.

Note

Updating the **shipment date** in an order header requires conditions to be recalculated, as it may be defined as criterion in a rule. To prevent messages that you should reopen the order first, set field **Allow DIT Lines recalculation on released orders to Yes without conformation in Foundation Setup, FastTab Application**.

Search for **Sales orders**.

Select the sales order for your customer NAME1.

- Reopen the order. Change the quantities
 - Your item NAME Beer Crate 20x50CL: 10 CRATES
 - Your item NAME Beer Can 6x33CL: 10 TRAYS
 - Your item NAME Beer CRONUS Premium Bottle 6x33CL: 10 TRAYS
- Release the order. Expand the lines and explain the attached condition lines

Note

When you define a minimum in a rate, field **Based on Item type** determines where that minimum is calculated over

- **Member**: the minimum applies to each item of the group (**Item type/Code**) individually
- **Item classification/group/all items**; the minimum is for the group in total; when met, it is calculated for each member.

Search for **Sales and Purchase Condition Classifications**.

- Select your NAME_RETAIL. Select **Rules** action and change your rule
 - Based on Item type/Code: your item classification NAME_BBTL



- Certify the rule again

Search for **Sales orders**.

Select the sales order for your customer NAME1.

- Reopen the order.
- Release the order. Expand the lines and explain the attached condition lines

Your customer NAME1 calls you and asks to delay the order with one week.

- Find the order and set the shipment date in the header to next week
- Expand the lines and explain the attached condition lines

 **Note**

Defining a **starting date** and **ending date** for a **rule** means from and until when a rule is valid. When a rate changes you do not need to create a new rule, but create **new rate** instead and define there with the starting and ending date when a rate is valid. Usually for campaigns rules are created with a starting and ending date. When the same campaign is active again later, you do not have to create a new rule, just change the starting and ending date of the existing rule.

Full Pallet discount

All your customers get a pallet discount when they order a full pallet of one product, as this saves the Cronus company mixed pallet preparation in the warehouse.

Search for **Sales and Purchase Condition Rules**.

- Create a new rule
 - Source type/No: your customer classification NAME
 - Item type/Code: classification ALL beverages
 - Calculation Code: select DISC_PRICE
 - Description: Full pallet discount 5,- / PAL recurring
 - Based on Source: Member (each customer/member of this group)
 - Based on Item type: Member (the minimum criterion in the rate applies to each member of the item group individually)
 - Direction of Movement: Both
 - Based on Reason: group SALES (default from calculation code; this discount is not given on free items)
 - Drill down on the **No. of Rates** field and create a new Rate
 - Unit of Measurement Code (Quantity): PAL



- Minimum Quantity; 1
- Rate Unit (Price): 5,00
- Unit of Measure (Price): select PAL
- Recurring = yes
- Recurring Quantity: 1

- Create another rate
 - Unit of Measurement Code (Quantity): PAL_LG
 - Minimum Quantity; 1
 - Rate Unit (Price): 2,00
 - Unit of Measure (Price): select PAL_LG
 - Recurring = yes
 - Recurring Quantity: 1

- Back in the rule: set **Status** to Certified

Search for **Customers**. Select your customer NAME1

- Select **Customer Rules Overview** action and view all rules applicable for this customer.

Search for **Sales orders**

Select the sales order for your customer NAME1.

- Reopen the order. Change the quantities
 - Your item NAME Beer Crate 20x50CL: 40 CRATES
 - Your item NAME Beer Can 6x33CL: 40 TRAYS

- Release the order. Expand the lines and view the attached condition lines

- Reopen the order. Change the quantities
 - Your item NAME Beer Crate 20x50CL: 100 CRATES
 - Your item NAME Beer Can 6x33CL: 80 TRAYS

- Release the order. Expand the lines and explain the attached condition lines
 - 2 PAL discount on the crate item * 5,-
 - 1 PAL_LG discount on the can item * 2,-

Net% Pickup discount

An agreement with your customer NAME1 has been made that he will come to your warehouse to pickup the goods. That saves you delivery cost. In return the customer will get a pickup discount of 1% over the goods value.



Search for **Customers**. Select your customer NAME1

- Select **Customer Rules** action and create a new rule
 - Source type/No: your customer NAME1
 - Item type: ALL items
 - Calculation Code: select DISC_NETL2
 - Description: Pickup Disc. %1 net
 - Based on Source: Member (=customer self)
 - Based on Item type: Member
 - Direction of Movement: Outbound (you will not discount for returns)
 - Based on Shipment Method: select group PICKUP
 - Calculate on Tax: Yes (discount also over possible tax charges)
 - Calculate on Deposit: No (the deposit is charged in full)
 - Starting date: 01-01-22
 - Drill down on the **No. of Rates** field and create a new Rate
 - Rate Unit (Net%): 1
 - Back in the rule: set **Status** to Certified

 Note

The **shipment method** is by default filled from the customer, vendor or address code in the order. When App **Drink-it Logistics** is installed, you can define a default shipment method per **Route**, which will overrule.

 Note

Updating the **shipment method** in an order header requires conditions to be recalculated, as it may be defined as criterion in a rule. To prevent messages that you should reopen the order first, set field **Allow DIT Lines recalculation on released orders** to **Yes without conformation** in **Foundation Setup, FastTab Application**.

Search for **Sales orders**.

Create a new order for your customer NAME1

- Select route 1100
 - Create lines of type = Item
 - Your item NAME Beer Crate 20x50CL: 40 CRATES
 - Your item NAME Beer Can 6x33CL: 80 TRAYS



- Release the order. Notice the attached condition line for pickup discount

When App **Drink-it Logistics** is installed.

Your customer NAME1 calls to your office and says he cannot make it to pickup the goods this time and wa

Find the order for your customer NAME1

- Change the route in 1021
- Expand the lines and explain the attached condition lines

Net% Payment discount

An agreement with your customer NAME1 has been made that when he pays the orders cash on delivery/pickup, he gets a payment discount of 1% over the goods value.

Search for **Customers**. Select your customer NAME1

- Select **Customer Rules** action and create a new rule
 - Source type/No: your customer NAME1
 - Item type: ALL items
 - Calculation Code: select DISC_NETL2
 - Description: Cash payment Disc. %1 net
 - Based on Source: Member (=customer self)
 - Based on Item type: Member
 - Direction of Movement: Both
 - Based on Payment Method: select group COD
 - Calculate on Tax: Yes (discount also over possible tax charges)
 - Calculate on Deposit: No (the deposit is charged in full)
 - Starting date: 01-01-22
 - Drill down on the **No. of Rates** field and create a new Rate
 - Rate Unit (Net%): 1
 - Back in the rule: set **Status** to Certified

Note

The **Payment method** is by default filled from the bill-to customer or pay-to vendor in the order. But you can change it for an order.



 Note

Updating the **payment method** in an order header requires conditions to be recalculated, as it may be defined as criterion in a rule. To prevent messages that you should reopen the order first, set field **Allow DIT Lines recalculation on released orders** to **Yes without conformation** in **Foundation Setup, FastTab Application**.

Search for **Sales orders**.

Create a new order for your customer NAME1

- Select route 1100
- Create lines of type = Item
- Your item NAME Beer Crate 20x50CL: 40 CRATES
- Your item NAME Beer Can 6x33CL: 80 TRAYS
- On FastTab **Payment**: select **Payment method code** = CASH
- Release the order. Notice the attached condition lines.
- Explain the calculation. Select the **Condition Line** field (when you added it as Personalisation) or select **Line – Related Information – Condition Lines** for background information.

Search for **Customers**. Select your customer NAME1

- Select Customer Rules action and select the rule for this payment discount
 - Change field Position Level into 3
 - Certify the rule again

Find the sales order for your customer NAME1 again

- Reopen the order
- Release the order. Explain the calculation of attached condition lines.
- Reopen the order
- On FastTab **Payment** change the **Payment Method** into BANK
- Release the order. Explain the calculation of attached condition lines.

 Note

Following fields in the condition rule determine the base amount where a **Net%** is calculated over

- **Position level**: other conditions with a lower level are included



- **Calculate on Tax**
- **Calculate on Deposit**
- **The Reason code** of other conditions. Inserted condition lines inherit the reason code from the item line unless you selected a reason code for the rule. When that reason code is not part of the **Based on Reason code/group** of the Net% rule it is excluded. And further BCs **Line Discount** of the item line A **Gross%** condition is always calculated over the **Unit Price/Dir. Unit Cost** of the item line.

Purchase order

Conditions can be setup for purchase the same as for sales.

Search for **Vendors**. Select your vendor NAME1.

- Select **Vendor Rules** action and create a new rule
 - Source type/No: your vendor NAME
 - Item type/Code: select your classification NAME_VEND
 - Calculation Code: select DISC_NET
 - Description: Discount 2% on your NAME products
 - Based on Source: Member (=Vendor self)
 - Based on Item type/code: Member (each member of your NAME_VEND)
 - Starting date: 01-01-22
 - Drill down on the **No. of Rates** field and create a new Rate
 - Rate Unit (Net%): 2
 - Back in the rule: set **Status** to Certified

Search for Purchase orders

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.
- Expand the lines and notice the attached condition lines



On invoice promotions

Article • 7/6/2023 • 13 min read

This exercise will help you to get a better understanding of the Apteau Beverage Sales-Purchase Conditions extension. 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 3 – On Invoice Promotions

Master Data

Search for Reason Codes

- Create a new reason code
- Code: your NAME_FREE
- Description Free products from your NAME
- Free (Line Discount): Both
- Ignore Deposit: yes (deposit still charged on free product)
- Ignore Tax Charges: no
- Sales: yes
- Purchase: yes
- Item Journal: yes (if you cannot find a field, open the card page)

Create a new reason code

- Code: your NAME_FRDISC
- Description Free products by discount from your NAME
- Free (Line Discount): leave blank
- Sales: yes
- Purchase: yes
- Item Journal: yes (if you cannot find a field, open the card page)

Create a new reason code

- Code: your NAME_FRVAT



Sales-Purchase Conditions for Drink-IT

- Description: VAT on FREE by discount from your NAME
- Free (Line Discount): leave blank
- Sales: yes
- Purchase: yes
- Item Journal: yes (if you cannot find a field, open the card page)

Search for Sales and Purchase Condition Calculations

Create a new Calculation Code

- Code: your NAME_FREE1
- Description: your NAME Buy 10 get 11
- Calculation type: Promotion (Free item)
- Calculate on Special Price; Both
- Calculation Method: Gross%
- Calculation Period: Order
- Based on Reason (sales): select the reason group SALES (the discount should only be calculated over normal sales transactions, not over free items, not include 3rd party settlements)
- Reason Code (sales): select your NAME_FREE
- Based on Reason (purchase): select the reason group PURCHASE
- Reason Code (purchase): select your NAME_FREE

Create another Calculation Code

- Code: your NAME_FREE2
- Description: your NAME Buy 10 pay 9
- Calculation type: Promotion (Discount)
- Type/No: select the item charge code for volume discounts
- Calculate on Special Price; Both
- Calculation Method: Net%
- Calculation Period: Order
- Based on Reason (sales): select the reason group SALES (the discount should only be calculated over normal sales transactions, not over free items, not include 3rd party settlements)
- Reason Code (sales): select your NAME_FRDISC
- Based on Reason (purchase): select the reason group PURCHASE
- Reason Code (sales): select your NAME_FRDISC

Create another Calculation Code



- Code: your NAME_FREE3
- Description: your NAME VAT on FREE
- Calculation type: Promotion (Discount)
- Type/No:
 - select item charge code; Create a new item charge code and select that
 - Code: 930NAME
 - Description: Discount with expensed VAT
 - Gen. product Posting group: 931
 - VAT Product posting group: NO VAT
- Calculate on Special Price; Both
- Calculation Method: Net%
- Calculation Period: Order
- Based on Reason (sales): select your reason code NAME_FRVAT

Manually by Reason code

Search for **Sales orders**.

Create a new order for your customer NAME1.

- Create lines of type = Item
 - Your item NAME Beer Crate 20x50CL: 10 CRATES
 - Your item NAME Beer Crate 20x50CL: 2 CRATES
 - Set the Reason code to your NAME_FREE
- Release the order. Expand the lines and view all
 - Notice no line amount, no discount lines, but deposit lines on the free item line

Note

When Aptean Beverage [Advanced Sales Management](#) is installed you can create order lines using the **Order Entry** page. In this page an **alert** is given when **blanket sales order lines** exist for the customer and you can insert them in your order. You could create such 'pre-order' lines for incidental free products. Eg. a salesperson who visited a customer and promised free POS items on the next order intake.

In section **Relation with other Apps** you will find more information on **Order Entry**.

The salesperson visited your customer NAME2. The pub requires new CRONUS beerglasses. They agreed that on the next order intake the customer will order 20 small beerglasses, of which 10 will be given away for free.



Search for **Blanket Sales orders**.

Create a new blanket order for your customer NAME2.

- Set the shipment date on today
- Create lines of type = Item
 - Select item 5033 CRONUS beerglass 33CL (POS)
 - Select item 5033 CRONUS beerglass 33CL (POS)
 - Select your reason code NAME_FREE

Search for **Sales orders**.

Create a new order for your customer NAME2

Click on action **Order Entry**

- Create a line for your item NAME Beer Crate 20x50CL: 10 CRATES
- Click on the **Notification** for blanket order lines, or click on action **Get Blanket order lines**
 - Select both lines and OK
- Close the Order entry page and confirm to apply
- Release the order

Buy 10 get 11

Customer your NAME1 gets this week a free tray on every 8 trays of your item NAME Beer Can 6x33CL that he buys.

Search for **Customers**. Select your customer NAME1

- Click on action **Customer Rules** and create a new rule
 - Source type/No: your customer NAME1
 - Item type/Code: Select your item NAME Beer Can 6x33CL
 - Calculation Code: select your code NAME_FREE
 - Description: This week promotion buy 8 trays get 1 free
 - Based on Source: Member
 - Based on Item type: Member
 - Based on Reason: group SALES
 - Reason Code: NAME_FREE
 - Direction of Movement: Outbound
 - Starting date: this week's Monday



Sales-Purchase Conditions for Drink-IT

- Ending date: this week's Friday
- Drill down on the No. of Rates field and create a new Rate
 - Unit of Measurement Code (Quantity): TRAY
 - Minimum Quantity; 8
 - Rate Unit (Gross%): 100 (fixed)
 - Recurring = yes
 - Recurring Quantity: 8
 - Free item Type: Member
 - Free Quantity: 1
 - Free Unit of Measure Code: TRAY
- Back in the rule: set Status to Certified

Search for **Sales orders**

Create a new order for your customer NAME1.

- Create lines of type = Item
 - Your item NAME Beer Can 6x33CL: 20 TRAYS
 - Your item NAME Beer Cronus Premium Bottle 6x33CL: 20 TRAYS
- Release the order
 - Expand the lines and explain them

Buy 10 pay 9

Another promotion for customer your NAME1 this week. On every 8 trays of your item NAME Beer Cronus Premium Bottle 6x33CL he has to pay only 7.

Search for **Customers**. Select your customer NAME1

- Click on action **Customer Rules** and create a new rule
 - Source type/No: your customer NAME1
 - Item type/Code: Select your item NAME Beer Cronus Premium Bottle 6x33CL
 - Calculation Code: select your code NAME_FREE2
 - Description: This week promotion buy 8 trays, pay 7
 - Based on Source: Member
 - Based on Item type: Member
 - Based on Reason: group SALES
 - Direction of Movement: Outbound



- Drill down on the b field and create a new Rate
 - Unit of Measurement Code (Quantity): TRAY
 - Minimum Quantity; 8
 - Rate Unit (Net%): 100 (fixed)
 - Recurring = yes
 - Recurring Quantity: 8
 - Free item Type: Member
 - Free Quantity: 1
 - Free Unit of Measure Code: TRAY
- Back in the rule: set **Status** to Certified

Search for image.png

Open the sales order for your customer NAME1

- Reopen the order
- Release it again
 - Expand the Lines and explain them

VAT on Free

An item is given away for free, but the company must declare and pay VAT over it, based on the normal sales price. The customer does not pay that VAT, he gets the item fully for free (perhaps pay deposit). The VAT amount is in a way 'expensed' for the company.

Typically for employees getting goods for free, or 'consumer' free orders (free products to consumers).

Search for **Customers**.

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

- Apply template Customers domestic (tax paid)
- FastTab **General**
 - Name: Your NAME5 (Employee)
- FastTab **Address&Contact**
 - City: Birmingham
- FastTab **Invoicing**
 - Customer Price Group RETAIL
 - **Prices Including VAT: set to yes**



- **FastTab Payments**
 - Payment Method: ACCOUNT
 - Payment Terms: CM
- **FastTab Logistics**
 - Route: select route 1300

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.
- Click on action **Customer Groups** (via **Sales & Conditions**)
 - Add the customer to your group NAME_EMPL, by selecting it in a line

Search for **Sales and Purchase Condition Groups**

- Select the line of your group NAME_EMPL
- Click on action **Rules** and create a new rule
 - Source type/No: select Group Customer: your NAME_EMPL
 - Item type/Code: Select ALL Beverages
 - Calculation Code: select your code NAME_FREE3
 - Description: Employee free products
 - Based on Source: Member
 - Based on Item type: Member
 - Based on Reason: your reason code NAME_FRVAT
 - Direction of Movement: Both
 - Drill down on the **No. of Rates** field and
 - create a rate per sales UOM
 - Unit of Measurement Code (Quantity): CRATE
 - Minimum Quantity; 1
 - Rate Unit (Net%): 100 (fixed)
 - Recurring = yes
 - Recurring Quantity: 1
 - Free item Type: Member



Sales-Purchase Conditions for Drink-IT

- Free Quantity: 1
- Free Unit of Measure Code: CRATE
- create a rate per sales UOM
 - Unit of Measurement Code (Quantity): TRAY
 - Minimum Quantity; 1
 - Rate Unit (Net%): 100 (fixed)
 - Recurring = yes
 - Recurring Quantity: 1
 - Free item Type: Member
 - Free Quantity: 1
 - Free Unit of Measure Code: TRAY
- Back in the rule: set **Status** to Certified

Search for **Sales Orders**

Create a new order for your customer NAME5

- Create lines of type = Item
 - Your item NAME Beer Crate 20x50CL: 2 CRATES
 - Your item NAME Beer Can 6x33CL: 4 TRAYS
- Release the order. Expand the lines and explain them
 - Notice the Amount including VAT and the VAT Product Posting group
 - Notice the document totals, it may be the customer has an amount to pay for deposit **Post** the order: Ship + Invoice

Search for **Posted Sales invoices**

Open the invoice you just posted and click on action **Find Entries**

- View VAT Entries
- View G/L Entries
- View Customer ledger entry

But A get B

For all retailers you have a campaign this week on beers sold in bottle. For every 6 bottles of beer, the customer gets one small POS beer glass for free.

Search for **Sales and Purchase Condition Classifications**.



- Select your NAME_RETAIL. Click on action **Rules** and create a new rule
 - Source type/No: your customer classification NAME_RETAIL
 - Item type/Code: your item classification NAME_BBTL
 - Calculation Code: select your code NAME_FREE
 - Description: This week promotion buy 6 bottles beer get 1 beer glass free
 - Based on Source: Member
 - Based on Item type: Member
 - Based on Reason: select group SALES
 - Reason Code: your NAME_FREE
 - Direction of Movement: Outbound
 - Starting date: current week's Monday
 - Ending day: current week's Friday
 - Drill down on the **No. of Rates** field and create a new Rate
 - Unit of Measurement Code (Quantity): BOTTLE
 - Minimum Quantity: 6
 - Rate Unit (Gross%): 100 (fixed)
 - Recurring = yes
 - Recurring Quantity: 6
 - Free item Type: Item Other
 - Free Item No: select item 5033 Cronus beerglass 33CL
 - Free Quantity: 1
 - Free Unit of Measure Code: PCS
 - Back in the rule: set Status to Certified

Search for **Sales Orders**

Create a new order for your customer NAME1

- Create lines of type = Item
 - Your item NAME Beer Crate 20x50CL: 1 CRATE
 - Your item NAME Beer Can 6x33CL: 1 TRAY
 - Your item NAME Beer Cronus Premium Bottle 6x33CL: 1 TRAY
- Release the order. Explain the lines

Combi - buy A+B get C



Your customer NAME2 orders regularly 4 cases of the alcoholfree beer 1310 BEER CRONUS ZERO CASE 24X25CL. The Cronus company now has a new product in the low and zero alcohol beers: 1325 BEER CRONUS RADLER CRATE 24X33CL and wants to bring it under the attention of the pub. This month the customer gets 4 POS beer glasses for free when ordering at least 3 cases of the alcoholfree beer and 1 crate of the low alcohol beer.

Search for **Customers**. Select your customer NAME2

- Click on action Customer Rules and create a new rule
 - Source type/No: your customer NAME2
 - Item type/Code: Per Document
 - Calculation Code: select your code NAME_FREE
 - Description: This week promotion on Radler beer
 - Based on Source: Member
 - Based on Item type: Select Combined items
 - Based on Reason: group SALES
 - Reason Code: NAME_FREE
 - Direction of Movement: Outbound
 - Starting date: first day of this month
 - Ending date: last day of this month
 - Drill down on the **No. of Rates** field and
 - click on **Edit Combined Minimum Rates**
 - select item 1310, UOM CASE; Min. Quantity: 4
 - select item 1325, UOM CRATE; Min. Quantity: 1
 - close the page, back to the rates
 - Rate Unit (Gross%): 100 (fixed)
 - Recurring = no
 - Free item Type: Item other
 - Free Quantity: 4
 - Free item no: select 5033 Cronus beerglass 33CL
 - Free Unit of Measure Code: PCS
 - Back in the rule: set Status to Certified

Search for **Sales Orders**

Create a new order for your customer NAME2

- Create lines of type = Item



- Item: 1310: 5 CASES
- Release the order. No free POS line
- Reopen the order and change lines
 - Item: 1310: 4 CASES
 - Item 1325: 1 CRATES
- Release the order. A line is added for the free POS item, 4 PCS.

Mix & Match - buy A get B and/or C

For your customer NAME3 another promotion is active this month. When he buys 4 CRATES of item 1325 BEER CRONUS RADLER CRATE 24X33CL, he can choose what POS items to get for free, even combine it (mix & match).

Search for **Customers**. **Select** your customer NAME3

- Click on action **Customer Rules** and create a new rule
 - Source type/No: your customer NAME3
 - Item type/Code: Select item 1325
 - Calculation Code: select your code NAME_FREE
 - Description: This week promotion on Radler beer
 - Based on Source: Member
 - Based on Item type: Member
 - Based on Reason: group SALES
 - Reason Code: NAME_FREE
 - Direction of Movement: Outbound
 - Starting date: first day of this month
 - Ending date: last day of this month
 - Drill down on the **No. of Rates** field and
 - Unit of measure Code (Quantity): CRATE
 - Minimum Quantity: 4
 - Set **Free item type** to **Mix & Match**
 - click on **Edit Free Mix & Match** Item Rates
 - select item 5033, Free UOM PCS; Free Item Qty per: 2
 - select item 5050, Free UOM PCS; Free Item Qty per: 1
 - select item 5210, Free UOM PCS; Free Item Qty per: 2
 - select item 5220, Free UOM PCS; Free Item Qty per: 2
 - select item 5230, Free UOM PCS; Free Item Qty per: 1



- close the page, back to the rates
 - Rate Unit (Gross%): 100 (fixed)
 - Recurring = yes
 - Recurring quantity: 4
 - Free Quantity: 2
- Back in the rule: set **Status** to Certified

Search for Sales Orders

Create a new order for your customer NAME3

- Create lines of type = Item
 - Item: 1325: 4 CRATES
- Click on **Release**, but confirm with No when the Mix & Match question pops up.
- Open the **Get Mix & Match Promotion Lines** page via the **Notification** or via **Actions – Functions**.
 - The page shows you are entitled to a free quantity of 2.
 - Fill in the **Quantity to Handle** column which item and how much you want for free.
 - Select 2 PCS of the small beerglass and 1 PCS of the big beerglass (the small beerglass counts only half)
- Close the page by OK
- Release the order. Lines were added for the free POS items

Note

The **Get Mix & Match Promotion Lines** action comes available when you click on **Release**. When you want to select the promotion lines prior to that, click on the function **Calculate Drink-it Lines** first and the **Get Mix & Match Promotion Lines** function becomes available as well.

Note

The mix & match promotions is not mandatory, you can release the order without selecting. You can select a lower free quantity then what you are entitled to, but not more.



Off invoice discounts & charges

Article • 7/6/2023 • 10 min read

This exercise will help you to get a better understanding of the Aptean Beverage Sales-Purchase Conditions extension. 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 – Off Invoice Discounts & Charges

Month Discount Net%

Search for **Customers**. Select your customer NAME1

- Click on action Customer Rules and create a new rule
 - Source type/No: your customer NAME1
 - Item type/Code: Classification ALL beverages
 - Calculation Code: select your code NAME_MNET
 - Description: Month discount 1%
 - Based on Source: Member (the discount is based on sales to customer self)
 - Based on Item type/Code Classification ALL beverages
 - Direction of Movement: Both
 - Starting date: 01-01-22
 - Drill down on the No. of Rates field and create a new Rate
 - Rate Unit (Net%): 1
 - Back in the rule: set Status to Certified

Search for **Sales orders**

Find the sales order(s) you created for the customer in the previous sections.

- Reopen and release them
- Expand the lines.
- Click on The **Condition Line** field (when you added it as Personalization) or select **Line – Related Information – Condition Lines** for background information.



- Notice the line for this off-invoice condition.
- Post the order: Ship & Invoice

Search for **Posted Sales shipments**

- Find the **Posted sales shipment** of your order and click on action Find Entries
 - view the **Condition Ledger Entries** for the month discount
 - View the **G/L entries** with the source code for conditions accruals

Month Discount per HL

An agreement was made with the business group your NAME_GROUP that all pubs belonging to it get a monthly discount of 10,- / HL over sold beers.

Search for **Sales and Purchase Condition Classifications.**

- Select your NAME_GRPPUB. Click on action Rules and create a new rule
 - Source type/No: your customer classification NAME_GRPPUB
 - Item type/Code: select your item classification NAME_BEER
 - Calculation Code: select M_HL_DISC
 - Description: Month Discount 10,- / HL over of beer
 - Based on Source: Member (each customer/member of this group gets his own credit memo)
 - Based on Item type: select your item classification NAME_BEER
 - Direction of Movement: Both
 - Based on Reason: group SALES (default from calculation code; this discount is not given on free items)
 - Starting date: 01-01-22
 - Drill down on the No. of Rates field and create a new Rate
 - Rate Unit (Price): 10,-
 - Unit of Measure (Price): select HL
 - Back in the rule: set Status to Certified

Search for **Sales orders.**

- Create a new order for your customer NAME2.
- Create lines of type = Item
 - Your item NAME Beer Crate 20x50CL: 10 CRATES
 - Your item NAME Beer Can 6x33CL: 10 TRAYS
 - Your item NAME Beer Cronus Premium Bottle 6x33CL: 10 TRAYS



- Release the order.
- Click per item line on The **Condition Line** field (when you added it as Personalization) or select **Line – Related Information – Condition Lines** and view the periodic conditions.

Do **not** post the order yet.

Create a new order for your customer NAME3.

- Create lines of type = Item
 - Your item NAME Beer Crate 20x50CL: 5 CRATES
 - Your item NAME Beer Can 6x33CL: 10 TRAYS
- Your item NAME Beer Cronus Premium Bottle 6x33CL: 10 TRAYS
- Release the order.
- Click per item line on The Condition Line field (when you added it as Personalization) or select Line – Related Information – Condition Lines and view the periodic conditions.

Do **not** post the order yet.

Month Bonus/Malus in HL

An agreement was made with the business group your NAME_GROUP that all pubs belonging to it have a target of buying 1 HL beer from the Cronus company per month. There is a bonus/malus involved

- Over every HL a pub has purchased more, he gets 2,- HL bonus
- Over every HL a pub has purchased less more, he gets a malus (penalty) of 1,- HL.

Search for **Sales and Purchase Condition Classifications**.

- Select your NAME_GRPPUB. Click on action **Rules** and create a new rule
 - Source type/No: your customer classification NAME_GRPPUB
 - Item type/Code: select your item classification NAME_BEER
 - Calculation Code: select your NAME_MBONUS
 - Description: Month overage bonus 2,- / HL beer; target 1 HL
 - Based on Source: Member (each customer/member of this group gets his own credit memo in case of bonus)
 - Based on Item type: select your item classification NAME_BEER
 - Direction of Movement: Both
 - Based on Reason: group SALES (default from calculation code; this discount is not given on free items)
 - Starting date: 01-01-22
 - Drill down on the **No. of Rates** field and create a new Rate



- Unit of Measure Code (Quantity): HL
- Minimum Quantity: 1
- Rate Unit (Price): 2,-
- Unit of Measure (Price): select HL
- Back in the rule: set Status to Certified
- Select your NAME_GRPPUB. Click on action **Rules** and create another new rule
 - Source type/No: your customer classification NAME_GRPPUB
 - Item type/Code: select your item classification NAME_BEER
 - Calculation Code: select your NAME_MMALUS
 - Description: Month shortage malus 1,- / HL beer; target 1 HL
 - Based on Source: Member (each customer/member of this group gets his own sales invoice in case of malus)
 - Based on Item type: select your item classification NAME_BEER
 - Direction of Movement: Both
 - Based on Reason: group SALES (default from calculation code; this discount is not given on free items)
 - Starting date: 01-01-22
 - Drill down on the No. of Rates field and create a new Rate
 - Unit of Measure Code (Quantity): HL
 - Minimum Quantity: 1
 - Rate Unit (Price): 1,-
 - Unit of Measure (Price): select HL
 - Back in the rule: set Status to Certified

Search for **Sales orders**.

Find the order for your customer NAME2.

- Reopen it and release it
- Click per item line on The **Condition Line** field (when you added it as Personalization) or select **Line – Related Information – Condition Lines** and view the periodic conditions.

Do **not** post the order yet.

Find the order for your customer NAME3.

- Reopen it and release it
- Click per item line on The **Condition Line** field (when you added it as Personalization) or select **Line – Related Information – Condition Lines** and view the periodic conditions.



Do not **post** the order yet.

Month Tiered Bonus in HL

Your customer NAME_GROUP gets a fee on the total volume in HL of beer sold to his pubs. The fee is tiered

- Under 1 HL: nothing
- In between 1 and 2 HL: 1,- / HL
- In between 2 and 3 HL: 1,50 / HL
- Above 3 HL: 2,- / HL

Search for **Customers**. **Select** your customer NAME4

- Click on action Customer Rules and create a new rule
 - Source type/No: your customer NAME4
 - Item type/Code: select your item classification NAME_BEER
 - Calculation Code: select your code M_HL_TIERED
 - Description: HL Discount pubs of NAME_GROUP
 - Based on Source: select your classification NAME_GRPPUB (settlement based on sales to the customers of this group, not to the sales of customer NAME4 self)
 - Based on Item type/Code: select your item classification NAME_BEER (the minimum applies to the total volume of the group, not to each item member individually)
 - Direction of Movement: Both
 - Starting date: 01-01-22
 - Drill down on the **No. of Rates** field
 - Create a new **Rate**
 - Unit of Measure Code (Quantity): HL
 - Minimum Quantity: 1
 - Rate Unit (Price): 1,00
 - Unit of Measure (Price): select HL
 - Create a new **Rate**
 - Unit of Measure Code (Quantity): HL
 - Minimum Quantity: 2
 - Rate Unit (Price): 1,50
 - Unit of Measure (Price): select HL
 - Create a new **Rate**



- Unit of Measure Code (Quantity): HL
- Minimum Quantity: 3
- Rate Unit (Price): 2,00
- Unit of Measure (Price): select HL

- Back in the rule: set **Status** to Certified

Search for **Sales orders**.

Find the order for your customer NAME2.

- Reopen it and release it
- Click per item line on The **Condition Line** field (when you added it as Personalization) or select **Line – Related Information – Condition Lines** and view the periodic conditions.

Do **not** post the order yet.

Find the order for your customer NAME3.

- Reopen it and release it
- Click per item line on The **Condition Line** field (when you added it as Personalization) or select **Line – Related Information – Condition Lines** and view the periodic conditions.

Do **not** post the order yet.

Vendor Gross% Discount on Sales

Search for **Vendors**. Select your vendor NAME.

- Click on action **Vendor Rules** and create a new rule
 - Source type/No: your vendor NAME
 - Item type/Code: select your classification NAME_VEND
 - Calculation Code: select your NAME_MNET
 - Description: Monthly vendor contribution 1% on sales of your NAME products
 - Based on Source: All Customers
 - Based on Item type/Code: select your classification NAME_VEND
 - Starting date: 01-01-22
 - Drill down on the **No. of Rates** field and create a new Rate
 - Rate Unit (Net%): 1
 - Back in the rule: set **Status** to Certified

Search for **Sales orders**.



Find the order for your customer NAME2.

- Reopen it and release it
- Click per item line on The **Condition Line** field (when you added it as Personalization) or select **Line – Related Information – Condition Lines** and view the periodic conditions.
 - Why does the line for NAME Beer Cronus Premium 6x33CL not show the periodic condition for the vendor?

Post the order: ship & invoice

Find the order for your customer NAME3.

- Reopen it and release it
- Click per item line on The **Condition Line** field (when you added it as Personalisation) or select **Line – Related Information – Condition Lines** and view the periodic conditions.

Post the order: ship & invoice

Condition Periodic Settlement Journals

Search for **Condition Periodic Settlement Journals**

Drill down on the **Batch Name** and create a new Name

- Code: your NAME
- Description: Periodic settlements for your NAME
- No. Series: SPC_JNL_PER

Select your Batch Name in the journal.

Click on action **Suggest Settlement Lines**

- Ending Date: end of this month
- Starting Document No: when blank fill with your NAME1
- Rule Filters: filter on your customers only
 - Source No.: your @NAME
- Click OK

View the lines in your journal.

- Click on action **Applied Entries** to see the Condition Ledger entries they are based upon.
- For your customers NAME2 and NAME3
 - one of the 2 has **Status = Skipped**: the bonus or the malus.



- Other lines have **Status = Suggested**
- The **Document type** for the bonus line is Sales credit memo and for the malus line **Sales invoice**.
- For vendor your NAME the applied entries are the shipments for customer your NAME2 and NAME3. The document type is **purchase credit memo**

Click on action **Create Settlement Document**

- Leave the summarize options
- And click OK

All lines in the journal should have the status **Processing** now, except for the 2 journal lines to skip.

- Click per line on **Line – Settlement Documents** and view the credit memo or invoice
 - Lines split up by the summarize options
 - Item charges assigned to the shipments
- Post it

Alternatively: search for **Sales credit memos** resp. **Sales invoices** resp **Purchase credit memos** and post them.

Search for **Condition Periodic Settlement Journals**

- Select your batch Name
- Click on **Post Reverse Accruals (Skipped)**

Now all journal lines should be removed.

Search for **Posted sales credit memos**

Select the one you posted for your customer NAME1.

- Click on action **Find entries**
 - View the Condition ledger entries
 - View the G/L entries
 - View the value entries

 **Note**

When you created and certified a periodic rule after history was already posted, you can create **Condition ledger entries** for them via the **Conditions journal**. Fetch the entries via action **Suggest Periodic based on history** (it will recognize item ledger entries and indirect item ledger entries for which the condition ledger entry is missing for any rule). **Post** the journal.



Miscellaneous

Article • 7/6/2023 • 4 min read

This exercise will help you to get a better understanding of the Apteau Beverage Sales-Purchase Conditions extension. 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 - Miscellaneous

Conditions Customer/Vendor

Search for Customers

Create a new customer by the New action

- Apply template Customers domestic (tax paid)
- FastTab **General**
 - Name: Your NAME5 (Retail)
- FastTab **Address&Contact**
 - City: Birmingham
- FastTab **Dimensions** * Customer group/Channel: Retail
- Business Group: your NAME_GROUP
- FastTab **Sales Conditions**
 - Condition Customer on: select Other-to
 - Condition Customer No.: select your customer NAME1
- Click on action **Customer Rules Overview** and view all rules applicable for this customer

Price Unit of Measurement

Search for Items

Open the item card for item 1080 Cronus Premium KEG 50L

- On FastTab



Sales-Purchase Conditions for Drink-IT

- General: Base Unit of Measure Code = KEG
 - Prices and Sales: Sales UOM Code = KEG
 - Replenishment: Purchase UOM Code = KEG
 - Item Conditions: Price UOM Code = HL
- Click on action Sales prices: notice prices are set in HL
 - Click on action Purchase prices: notice prices are set in HL

This feature is required by some producers (breweries mostly) who have agreed upon hectolitre prices with customer for certain items (like kegged items). In sales and purchase documents the HL price is recalculated to the UOM of the line, as if it were the base UOM.

Special Price

In sales prices and purchase prices you can check field Special price. When that price is calculated, the sales or purchase line gets that field also checked. So do item ledger entries.

On the **Sales and Purchase Condition Calculation code**, you indicate by field **Calculate on Special Price** whether a rule should be calculated over such line

- No: do not calculate over the line
- Yes: calculate only for a special price line
- Both

Manually altered Prices and Line Discounts

Search for Sales and Conditions Setup

On FastTab Sales

- With field **Reason Code mandatory for Price Change** you steer that the unit price may not be altered on an item sales line unless you select a reason code that allows for it.
- With field **Reason Code mandatory for Line Discount** you steer that the Line Discount may not be altered on an item sales line unless you select a reason code that allows for it.

On FastTab Purchase

- With field **Reason Code mandatory for Price Change** you steer that the Dir. unit Cost may not be altered on an item purchase line unless you select a reason code that allows for it.
- With field **Reason Code mandatory for Line Discount** you steer that the Line Discount may not be altered on an item purchase line unless you select a reason code that allows for it.

Search for Reason Codes

Relevant when on general level in the **Sales and Conditions Setup** modifications are restricted.



- Allow Price Change (item)
 - Set to **Sales, Purchase** or **Both** if you allow to any of them
- Free Line Discount
 - Set to **Sales, Purchase** or **Both** if you allow to any of them

Fixed Price

Search for Sales Return Orders

Create a new return order for your customer NAME1

Click on action **Get Posted Document Lines to Reverse**

- Select some lines of the last invoice you posted for your customer
- Enable column **Fixed Price** in the sales return order lines page by **Personalization** (via My Settings)
- Expand the lines. Change a quantity on an item line.
- Notice the unit prices of both the item line and its attached condition lines are fixed.
- This guarantees a same net price being credited.



Relation with other apps

Article • 4/5/2024 • 9 min read

This exercise will help you to get a better understanding of the Apteau Beverage Sales-Purchase Conditions extension. 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 - Relation with other apps

Some features are enabled from other Drink-it Apps, but form a relevant part in Sales & Purchase Conditions.

Indirect Sales (Advanced Sales Management)

Customers can be defined as indirect customers and indirect sales entries can be posted. An indirect customer is defined as a 'Tier 3' customer, an outlet that gets delivered by one of your customers (a distributor). Producers may maintain a relationship with the outlet, have an agreement stated in a contract:

- Producer facilitates the outlet (by Loans, Loan in use items, Rental agreements)
- Contract budgets on expected sales of producer's products
- Periodic discount from producer to outlet based on reported indirect sales (often used to pay back a loan)

It is possible to define condition calculation codes based on indirect sales, setup a condition rule and to issue a periodic settlement document (credit memo) for that.

Search for **Customers**.

Create a new customer by the New action

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



- **FastTab Payments**
 - Payment Method: the customer pays by bank transfer;
 - Payment Terms: after 14 days
- **FastTab Logistics**
 - Route: select your route (NAME_ROUTE1) or route 1300
- **FastTab Dimensions**
 - Customer group/Channel: Wholesalers
 - Business Group: your OWN
- **FastTab Advanced Sales Management**
 - Customer Relations: check this field
 - Customer Type: select Direct

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

- Apply template Customers domestic (tax paid)
- **FastTab General**
 - Name: Your NAME_IND
- **FastTab Address&Contact**
 - City: Birmingham
- **FastTab Invoicing**
 - Customer Price Group PREM
- **FastTab Payments**
 - Payment Method: Account
 - Payment Terms: 0D
- **FastTab Dimensions**
 - Customer group/Channel: Pubs
 - Business Group: your NAME_GROUP
- **FastTab Advanced Sales Management**
 - Customer Type: select Indirect
 - Delivered-by Customer no: select your NAME_DIST
- Click on action **Customer Rules** and create a new rule
 - Source type/No: your customer NAME_IND



Sales-Purchase Conditions for Drink-IT

- Item type: Classification item; Classification Code: Own Beers
- Calculation Code: select M_IND_DISC
- Description: Monthly Discount 10,- / HL on Own Beers
- Based on Source: Member (=Customer self)
- Based on Item type: Classification item; Classification Code: Own Beers
- Starting date: 01-01-22
- Drill down on the No. of Rates field and create one Rate
 - Rate Unit Price: 10
 - Unit of measure Code (Price): HL
- Back in the rule: set **Status** to Certified

Search for Indirect Sales Journal

- Drill down on the **Batch name**
- Create a new batch name with your NAME (Code and Description)
- No. Series: SALIND

Select your Batch name

- Create a journal line
 - Posting date 31-1-22
 - Customer: your NAME_IND
 - Delivered-by Customer: NAME_DIST
 - Item: NAME Beer Crate 20x50CL
 - Quantity: 4
 - Unit of measurement: CRATE
- Create another journal line
 - Posting date 31-1-22
 - Customer: your NAME_IND
 - Delivered-by Customer: NAME_DIST
 - Item: NAME Beer Cronus Premium Bottle 6x33CL
 - Quantity: 10
 - Unit of measurement: TRAY
- Click on action Calculate Condition Lines
 - View Column **Condition Amount** (possibly you have to add the column by Personalize (via **My Settings**))



Post your journal.

Search for **Indirect Sales Registers**.

- Click on the register for the Batch Name you just posted and click on **Indirect Sales Entries**
 - View Column **Condition Amount** (possibly you have to add the column by Personalise (via **My Settings**))
 - Drill down on it and view the **Condition Ledger entries**

Search for **Condition Periodic Settlement Journals**

- Select your batch Name

Click on action **Suggest Settlement Lines**

- Ending Date: end of this month
- Starting Document No: when blank fill with your NAME1
- Rule Filters: filter on your customer
 - Source No.: your NAME_IND
- Click OK

Click on action **Create Settlement Document**

- Leave the summarize options
- And click OK Find the **Sales Credit memo** and **post** it.

Order entry (Advanced Sales Management)

Search for **Recurring sales lines**

Create a new (standard sales) code

- Code: your NAME
- Description: your NAME items
- Create lines of type = Item
 - Your item NAME Beer Crate 20x50CL
 - Your item NAME Beer Can 6x33CL
 - Your item NAME Beer Cronus Premium Bottle 6x33CL

Search for **Customers**

Filter on your customers. For each: On FastTab Advanced Sales Management, click on **Setup Recurring Sales Lines**.

- In the recurring sales lines page that opens create a line and select the standard sales code of your NAME



- Set field **Insert Rec Lines on Order Entry** to Automatic

Search for **Sales orders**

Create a new sales order for your customer NAME1

- Click on action **Order Entry**
 - Fill some quantities in the lines you see
 - In the Quick entry pane, select item 1080, and fill a quantity of 2. ENTER
 - Close the page and confirm to apply.
- Release the order

Calculate Condition Alerts

When entering the **Item No.** on the **Quick Entry** FastTab of the **Order Entry** page, the **Condition Alters** field gets updated upon executing the **Calculate Condition Alerts** action, when the **Order Entry Condition** field is set as *On Request or Default (On Request)* on the **Order Entry** FastTab of the [Advanced Sales Management Setup](#) page.

Period Invoices and -Credit Memos (Foundation)

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**.

Invoices that are created this way will contain attached charges (condition lines, deposit lines, tax lines).

When you create an invoice manually the Lines functions **Get Shipment Lines** will include attached lines as well (you only see and select item lines).

For purchase invoices the same, some companies do not post invoices from the purchase order document (segregation of duties, 3-way matching). When registering invoices through the purchase invoice document and creating lines by the **Get Receipt Lines** function it will include attached lines.

Gross-Net Price List (Foundation)

Search for **Customers**.

Filter on your customer NAMEs. On each card

- On FastTab **Foundation** and set field
 - Prices Incl. Tax Charges: on



Sales-Purchase Conditions for Drink-IT

- Prices Incl. Deposit Charges: off
- Prices Incl. Condition Charges: on

Search for **Gross Net Price List**

Click on action **Calculate Prices**

- As per Date: 1-1-22
- Filter on Item: your NAME only (Description: @NAME)
- Filter on Customer: your NAME only (Name: @NAME)

Search for **Customers**

Open the card for customer NAME1

- Click on action **Gross Net Price List** and view the lines

Dimensions and Price Warning (Business Central Accelerator)

Search for **General Ledger Setup**

Click on action **Change Global-Shortcut Dimensions**

- Next to the global dimension1 and 2 BC enables to define shortcut dimension 3-8 also as 'global'.
- BCA added 2 more No need to change now for this training

These Global-Shortcut dimensions are use in Sales and Purchase Conditions, in the Classifications (Search for **Sales and purchase Condition Classifications**).

Search for **Business Central Accelerator Setup**

Click on **Business Central Accelerator Setup for Sales**.

- **Sales Price Mandatory:** select **No Warning**, **Warning**, or **Blocked**
 - As the field indicates, you can get a warning or blocking message when releasing an order for which an item line does not contain an price.
 - This is the default setting, you can deviate from it per item, on FastTab Business Central Accelerator. You may want to do so for empty good items for which no prices were setup (but deposit charges instead), and possibly other items.
- **Customer Auto Dim. Code:** when you select a dimension code, for new customer automatically a dimension value is created and assigned to the customer as default dimension
- **Dimensions From: Bill-to,Sell-to**
 - in std BC sales documents get the dimensions from the bill-to customer



- that may not always be wanted, a sell-to customer may have specific own dimensions (channel, region...) you want to report on and have conditions based on. Set it to Sell-to then
- you can always create a dimension code like CUSTGROUP and define a bill-to there. A sell-to can have own dimension and such a CUSTGRP value. Dimensions from the bill-to cannot report on the sell-to customers.
- You can deviate per customer from it, on FastTab Dimensions.

Back to the Business Central Accelerator page, FastTab **Sales**.

- **Dimensions on Customers:** drill down on the button and select the (global) dimension codes you want to see on a customer card.

Click on **Business Central Accelerator Setup for Purchase**.

- **Purchase Price Mandatory:** select **No Warning**, **Warning**, or **Blocked**
 - As the field indicates, you can get a warning or blocking message when releasing an order for which an item line does not contain an price.
 - This is the default setting, you can deviate from it per item, on FastTab **Business Central Accelerator**. You may want to do so for empty good items for which no prices were setup (but deposit charges instead), and possibly other items.
- **Vendor Auto Dim. Code:** when you select a dimension code, for a new vendor automatically a dimension value is created and assigned to the vendor as default dimension
- **Dimensions From: Pay-to, Buy-from**
 - in std BC purchase documents get the dimensions from the pay-to vendor
 - that may not always be wanted. Set it to Buy-from then.
 - you can deviate per vendor from it, on FastTab Dimensions.

Back to the Business Central Accelerator page, FastTab **Purchase**.

- **Dimensions on Vendors:** drill down on the button and select the (global) dimension codes you want to see on a vendor card.

Click on **Business Central Accelerator Setup for Inventory**.

- **Item Auto Dim. Code:** when you select a dimension code, for a new item automatically a dimension value is created and assigned to the item as default dimension.

Back to the Business Central Accelerator page, FastTab **Inventory**.

- **Dimensions on Items:** drill down on the button and select the (global) dimension codes you want to see on an item card.



Business process walkthroughs

Article • 7/4/2024 • 3 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

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. 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.

See also

[Copy a company.](#)

Overview

To	See
Learn about the price unit of measure.	Walkthrough: Prices in Drink-IT Sales and Purchase Conditions
Learn about changing prices in transactions.	Walkthrough: Changing Prices in Sales and Purchase Documents.
Learn about percentage discounts on volumes (on-invoice)	Walkthrough: Percentage Discounts on Volumes for Specific Products.
Learn about amount discounts based on volumes.	Walkthrough: Amount Discounts on Volume
Learn about charges for small orders.	Walkthrough: Small Order Charges



Learn about logistical discounts.	Walkthrough: Logistic Discounts.
Learn about payment discounts.	Walkthrough: Payment Method Discounts.
Learn how to give items for free manually.	Walkthrough: Free Items, Manually, on invoice
Learn about automatically free (same) items.	Walkthrough: Free Promotion; 1 free crate for each 40 zero or low alcohol beers
Learn about automatically free (other) items.	Walkthrough: Free Promotion; 2 free prosecco on minimum 60 bottles wine
Learn about limiting the promotion free item using per customer	Walkthrough: Limit the promotion free item – Per Customer
Learn about limiting the promotion free item using per rule	Walkthrough: Limit the promotion free item – Per Rule
Learn about periodical amount discounts based on volumes.	Walkthrough: Monthly Discount Amount per HL
Learn about periodical percentage discounts with a minimum criterium.	Walkthrough: Quarter Discount Percentage on Minimum Sales
Learn about Discount Net% Percentage on Progressive Minima.	Walkthrough: Year Discount Net% Percentage on Progressive Minima
Learn about periodic discounts based on sales to customers.	Walkthrough: Vendor Discount (Periodic) Based on Sales to Customers
Learn how to Post Accruals for Periodic Conditions.	Walkthrough: Post Accruals for Periodic Conditions
Learn how to Create Condition Ledger Entries from history.	Walkthrough: Create Condition Ledger Entries from history.
Learn how to settle periodic conditions with customers and vendors.	Walkthrough: Settle the Periodic Conditions
Learn how to allocate a fixed amount discount.	Walkthrough: Allocate a Fixed Amount Discount
Learn how to use mix & match mandatory item functionality	Walkthrough: Mix & Match Mandatory Item Functionality



Learn how to use mix & match combine item functionality

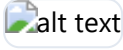
[Walkthrough: Mix & Match Combine Item Functionality](#)



Walkthrough: Prices in sales and purchase conditions

Article • 7/6/2023 • 2 min read

Customer 20000 Selangorian is a pub. They serve our Cronus Premium Beer from the draft. We made a price arrangement of 200.00 per hectoliter with them (Customer Price Group PREM). Now they order some kegs.

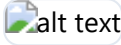
1. Select the Search icon  , enter **Sales Orders**, and then choose the related link.
2. Select **New** to create a new entry.
3. In the **Customer** field, enter the name Selangorian (20000).
4. In the **No.** field, enter 1080.
5. In the **Quantity** field, enter 1. The (Sales) Unit of Measure Code for this Item is KEG, with a volume of 50L.
6. Confirm yourself that the Unit Price in the line is 100,00.
This unit price can be explained by the Sales Prices of the item:
7. Open the Item Card from the **Sales Lines Details** FactBox on the **Sales Order** page.
8. Choose the **Sales Prices** action.
9. Verify the **Unit of Measure Code** and the **Unit Price**.



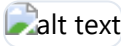
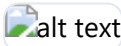
Walkthrough: Changing prices in sales and purchase documents

Article • 7/6/2023 • 5 min read

In sales documents, the unit price of an item is inserted according to your price setup. By standard, a user can change this price. In Aptean Beverage Sales-Purchase Conditions, you can:

- Force the user to use a reason code when he changes a price in the [Sales and Purchase Condition Setup](#).
- Limit the number of reasons for price changes in the [Reason Codes](#).
- Select the Search icon  , enter **Sales Orders**, and then choose the related link.
- Select **New** to create a new entry.
- In the **Customer** field, enter the name Selangorian (20000).
- In the **No.** field, enter 5033.
- In the **Quantity** field, enter 1. The Unit Price for this Item is 1,50. Change it to 1,00. It will cause an error because this change is not allowed with the default Reason Code in the line. Refresh to undo the change.
- Select **Reason Code** SAL_MAN and change the Unit Price again.

Explanation

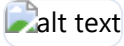
1. Select the Search icon  , enter **Sales and Purchase Condition Setup**, and then choose the related link.
2. On the **Sales & Receivables** FastTab, the **Reason Mandatory for Price Change** toggle is turned on.
3. Select the Search icon  , enter **Reason Codes**, and then choose the related link.
4. In the **Code** field, select **SAL_MAN**.
5. In the **Allow Price Change (Item)** field, select **Sales**.



Walkthrough: Percentage discounts on volumes for specific products

Article • 7/6/2023 • 5 min read

We want to stimulate the Selangorian Pub (20000) to buy our own beers. Therefore, we give them 2% discount on the net sales price when they buy these products.

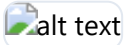
1. Select the Search icon  , enter **Sales Orders**, and then choose the related link.
2. Select **New** to create a new entry.
3. In the **Customer** field, enter the name Selangorian.
4. Fill in lines:

Item	Quantity
1010	1
1280	1
1510	1

5. Choose the **Release** action.
6. Choose the **Expand** action.
7. Verify the **Charge Item** lines with description Volume disc. Net 2% OB Level 2: they should show line amounts of:
 - -0.40 for item 1010
 - -3.16 for item 1280
 - There is no charge line for item 1510. Item 1510 is a lager beer that we purchase from another brewer and is therefore not included in the 2% discount condition.

Explanation

The discount in this exercise is defined in a [Condition Rule](#). This Rule can be verified:

11. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
12. Select **Rule No. 7** and choose the **Edit** action.
13. In the [Calculation Code](#) field on the **General** FastTab, the *DISC_NETL2* code is selected. We use this code for our on-invoice percentage discounts.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.



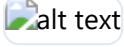
14. The **Description (General FastTab)** makes clear what the discount is about. It is shown on the order and can be printed on the invoice.
15. The **Position Level** for this discount is 2. Which here means that conditions with a lower position level are deducted from the sales amount before the 2% is calculated.
16. The rule has the *Certified* status. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
17. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 20000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
18. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the [Classification](#) Item OB. Use the AssistEdit button to the view this classification.
19. On the **Others** FastTab, we added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
20. On the [Rates](#) FastTab, the 2.00 is set in the Rate Unit (Net%) field.
 - You can use this example to implement such a condition by yourself.



Walkthrough: Amount discounts on volume

Article • 7/6/2023 • 5 min read

With the Fairway Sound Café (61000), we agreed that they get a discount on the invoice of 5.00 per hectoliter of our own beers.

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
2. Select **New** to create a new entry.
3. In the **Customer** field, enter the name Fairway Sound Café.
4. Fill in lines:

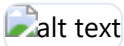
Item	Quantity
1080	10
1280	10
1770	10
1680	10

5. Choose the **Release** action (link the order to the existing call entry if the message pops up)
6. Choose the **Expand** action
7. Verify the **Charge Item** lines with description **Discount 5,- / HL Own beer**: they should show line amounts of:
 - -25.00 for item 1010
 - -25.00 for item 1280

There are no charge line for items 1770 and 1680. We purchase them and are therefore not included in the discount condition.

Explanation

The discount in this exercise is defined in a [Condition Rule](#). This Rule can be verified.

8. Select the Search icon , enter **Sales and Purchase Condition Rules**, and then choose the related link.
9. Select **Rule No. 35** and choose the **Edit** action.
10. In the [Calculation Code](#) field on the **General** FastTab, the DISC_PRICE code is selected. We use this code for our on-invoice amount discounts.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.



11. The **Description (General FastTab)** makes clear what the discount is about. It is shown on the order and can be printed on the invoice.
12. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
13. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 61000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
14. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the [Classification](#) Item OB. Use Lookup button the view this classification.
15. On the **Others** FastTab, we added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
16. In the [Rates](#) FastTab, the 5.00 is set in the **Rate Unit (Price)** field and the HL is selected in the **Unit of Measure (Price)** field.
 - You can use this example to implement such a condition by yourself.



Walkthrough: Small order charges

Article • 7/6/2023 • 4 min read

We want to encourage the Fairway Sound Café (61000) to order for more than 250.00. We do that by charging 7.50 on orders that are below that value.

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
2. Select **New** to create a new entry.
3. In the **Customer** field, enter the name Fairway Sound Café.
4. Fill in lines:

Item	Quantity
1080	1

5. Choose the **Release** action (link the order to the existing call entry if the message pops up)
6. Choose the **Expand** action
7. Verify that there is a **G/L Account** line with description **Order (<250.- surcharge 7.50)**
8. **Reopen** the Order and change Quantity to 20.
9. **Release** again.
10. Verify that there surcharge is not there.

Explanation

The discount in this exercise is defined in a [Condition Rule](#). This Rule can be verified:

11. Select the Search icon , enter **Sales and Purchase Condition Rules**, and then choose the related link.
12. Select **Rule No. 34** and choose the **Edit** action.
13. On the **General** FastTab, in the [Calculation Code](#) field, the *CHAR_FIX* code is selected. We use this code for our on-invoice fixed amount charges.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.
14. The **Description (General FastTab)** makes clear what the charge is about. It is shown on the order and can be printed on the invoice.
15. The rule has the *Certified* status. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
16. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 61000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).



17. On the **Item** FastTab, we selected the **Per Document** Item Type. This means that the charge is one-time applicable on every transaction.
18. In the **Based on Item** field, we selected *All Items* to make clear that the charge does not depend to what is sold.
19. In the [Rates](#) FastTab, 240.99 is set in the **Maximum Amount** field and *GBP* is selected in the **Unit of Measure (Price)** field and the **Rate Unit (Fixed Price)** has the 7.50 surcharge.

You can use this example to implement such a condition by yourself.



Walkthrough: Logistic discounts


Article • 7/6/2023 • 12 min read

Logistic discounts are in general give for circumstances that reduce your own logistical costs. Some examples are:

- Full pallet discount
- Mixed pallet discount
- Pickup discount
- Sorting fee returnable bottles

Full pallet discount

Guildford Wholesalers (50000) is buying full pallets with one (beverage) product. They get 5.00 discount for each pallet.


- Verify the setup for such a discount. You can use it as an example to implement it yourself:
- Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
- Select Rule No. 6 and choose the **Edit** action.
- In the [Calculation Code](#) field on the **General** FastTab, the *DISC_PRICE* code is selected. We use this code for our on-invoice amount discounts.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.
- The **Description (General FastTab)** makes clear what the charge is about. It is shown on the order and can be printed on the invoice.
- The rule has the *Certified* status. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
- On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 50000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
- On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the Classification Item ALL. Use the AssistEdit button to the view this classification. The field **Based on Item** is set to **Member**, which in this case means that the rule will be applied to each individual item in the classification group ALL.
- In the Rates FastTab:
 - PAL is selected:
 - in the Unit of Measure (Quantity) because the Quantity on the sales line should be converted to a pallet.
 - in the **Unit of Measure (Price)** because the discount is given per pallet.



- The **Minimum Quantity** is set to 1 because we need at least 1 full pallet for the ding Quantity is set to 1 because we give 5.00 for each full pallet Discount.
- The **Recurring Quantity** is set to 1 because we give 5.00 for each full pallet.

Mixed pallet discount

When the Selangorian Pub (20000) is buying mixed pallets with beverage products in cans or bottles, they get an additional discount of 1.00 for each pallet.

- Verify the setup for such a discount. You can use it as an example to implement it yourself:
- Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
- Select Rule No. 5 and choose the **Edit** action.
- In the **Calculation Code** field on the **General** FastTab, the *DISC_PRICE* code is selected. We use this code for our on-invoice amount discounts.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.
- The **Description (General FastTab)** makes clear what the charge is about. It is shown on the order and can be printed on the invoice.
- The rule has the *Certified* status. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
- On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 20000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
- On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the [classification](#) Item ALLBC. Use the Lookup button the view this classification. The field **Based on Item** is set to **Classification Other**, which in this case means that the rule will be applied to each individual item in the classification group ALLBC in the **Based on Classification Other Code** field.
- In the Rates FastTab:
 - PAL is selected:
 - in the **Unit of Measure (Quantity)** because the Quantities on the sales lines should be converted to a pallet.
 - in the **Unit of Measure (Price)** because the discount is given per pallet.
 - The **Minimum Quantity** is set to 1 because we need at least 1 full pallet for the discount.
 - The **Recurring Quantity** is set to 1 because we give 1.00 for each mixed pallet.

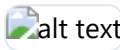


 Note

The only difference in the setup of Full Pallets and Mixed Pallets is the Based on Item in the Condition Rule: 1.
Full Pallet: Based on Item = Member 2. Mixed Pallet: Based on Item <> Member

Pickup discount

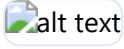
The Guildford Wholesalers (50000) organize their own logistics. They pickup the goods that they order by themselves. They get a discount of 1% on the net sales amount of beverages for it.

- Verify the setup for such a discount. You can use it as an example to implement it yourself:
- Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
- Select Rule No. 12 and choose the **Edit** action.
- In the [Calculation Code](#) field on the **General** FastTab, the DISC_NETL3 code is selected. We use this code for our on-invoice percentage discounts.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.
- The **Description (General FastTab)** makes clear what the charge is about. It is shown on the order and can be printed on the invoice.
- The **Position Level** for this discount is 3. Which here means that conditions with a lower position level are deducted from the sales amount before the 1% is calculated.
- The rule has the *Certified* status. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
- On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 50000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
- On the Item FastTab, we explained for which products the discount is applicable: all items that belong to the [classification](#) Item ALL. Use the Lookup button the view this classification.
- On the **Others** FastTab, we added additional criteria for the rule:
 - It is only applicable on transaction where the shipment method is PICKUP (**Based on Shipment Method** Code field). For this customer, PICKUP is the default shipment method.
 - It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our company, this code will automatically be inserted from the [Aptean Beverage Foundation Management](#) Setup.
- In the **Rates** FastTab, the 1.00 is set in the **Rate Unit (Net%)** field.



Sorting fee returnable bottles

The Cannon Drinks Group (10000) is a retailer. They properly sort the empties that they return. We give them a fee of 0.02 per bottle for that.

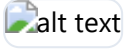
- Verify the setup for such a fee. You can use it as an example to implement it yourself:
- Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
- Select Rule No. 19 and choose the **Edit** action.
- In the [Calculation Code](#) Code field on the **General** FastTab, the DISC_SORT code is selected. We use this code for our sorting fees.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.
- In the **Direction of Movement** field, **Inbound** is selected. This means that the rule is only applicable when we receive goods. In this example, sales return lines (positive) or negative sales order lines.
- The **Description (General FastTab)** makes clear what the fee is about. It is shown on the order and can be printed on the invoice.
- The rule has the *Certified* status. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
- On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 10000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
- On the **Item** FastTab, we explained for which products the fee is applicable: all items that belong to the [group](#) Item SORTING. Use the Lookup button the view this group.
- In the **Rates** FastTab, the 0.02 is set in the Rate Unit (Price) field, and BOTTLE is selected as Unit of Measure Code (Price), since the 0.02 is per bottle.



Walkthrough: Payment method discounts

Article • 7/6/2023 • 3 min read

Customers that mandate us for direct debit receive a discount of 1% on their net sales. We have a direct debit mandate from the Selangorian Pub (20000).

- Verify the setup for such a discount. You can use it as an example to implement it yourself:
- Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
- Select **Rule No. 10** and choose the **Edit** action.
- on the General FastTab, in the [Calculation Code](#) field, the DISC_NETL3 code is selected. We use this code for our on-invoice percentage discounts.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.
- The **Description (General FastTab)** makes clear what the charge is about. It is shown on the order and can be printed on the invoice.
- The **Position Level** for this discount is 4. Which here means that conditions with a lower position level are deducted from the sales amount before the 1% is calculated.
- The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
- On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 20000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member). In the **Based on Payment Method Code**, we selected **BNKCONVDOM**. This means that the rule is only applicable on transaction where the payment method is BNKCONVDOM. For this customer, BNKCONVDOM is the default payment method.
- On the **Item** FastTab, we selected **All Items** in the **Item Type** field. The discount does not depend on what the customer is buying.
- On the **Others** FastTab, we added an additional criterium for the rule:
 - It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our company, this code will automatically be inserted from the Drink-IT Foundation Setup.
- On the [Rates](#) FastTab, the 1,00 is set in the **Rate Unit (Net%)** field.



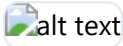
Walkthrough: Free items manually on invoice

Article • 7/6/2023 • 3 min read

As a Sales Operator, you might want to give some products for free when you do the order intake with a customer. In Aptean Beverage you can setup conditions for free products (discount promotions and free promotions) but there are off course also ways to do this manually. As a Sales Manager, you want to be able to report on products that were given for free. To make that possible, we made it possible that:

- The sales operator is forced to select a (free) reason for free products.
- The sales operator only has to select such a reason code in the sales line to make it free.

For the next exercise it is necessary that the [Reason Code](#) field is visible in the Sales Lines. The field is by default not visible but you can add it by [Personalize](#) your page if it is missing.

1. Select the Search icon  , enter **Sales Orders**, and then choose the related link.
2. Select **New** to create a new entry.
3. In the **Customer** field, enter the name, *Selangorian*.
4. In the **No.** field, enter 5033.
5. In the Quantity field, enter 1.
6. Enter 100 in the **Line Discount %** field. The error message that you get explains that 100 % discount is not allowed in combination with the **Reason Code** on the line. Refresh(F5) to undo the change.
7. Select FREE_SALSP in the **Reason Code** field on the sales line and check the **Line Discount %** field.
8. Choose the **Release** action.
9. Confirm yourself that the Line Discount in the line is 100 % and the Line Amount is [blank].

Explanation


10. In the **Drink-IT Foundation Setup** SAL_ORD (Sales orders and return orders, normal) is the **Default Reason Code** for Sales Orders. When we created the order, this code was filled it.
11. In the **Sales and Purchase Condition Setup**, the field **Reason Code Mandatory for Line Discounts** is selected on the **Sales** FastTab.
12. On the **Reason Code Card** page for SAL_ORD, the **Free (Line Discount)** field is [blank]. This explains why we got the error message when we tried to enter 100% discount with this code.
13. On the card for FREE_SALSP, **Sales** is selected in the **Free (Line Discount)** field. This allow us to use this code when entering 100% line discount.



Walkthrough: Free promotion; 1 free crate for each 40 zero or low alcohol beers

Article • 7/6/2023 • 5 min read

We want to promote our beers with zero or low alcohol. With the Guildford Wholesalers (50000), we agreed that they get 1 crate for free with every 40 crates that they order.


1. Select the Search icon  , enter **Sales Orders**, and then choose the related link.
2. Select **New** to create a new entry.
3. In the **Customer** field, enter the name Guildford Wholesalers.
4. Enter an **External** Document No.
5. Fill in lines:

Item	Quantity
1010	40
1310	40
1325	20

6. Choose the **Release** action.
7. Verify that:
 - There is no free item for 1010. It is not a zero or low alcohol product.
 - There is a free item for 1310. It meets the minimum criterium (quantity 40) and has *FREE_PROM* as **Reason Code**.
 - There is no free for 1325. It not meet the minimum criterium.
8. Choose the **Reopen** action and change the **Quantity** for 1310 to 100.
9. Choose the **Release** action again.
10. Verify that there a now 2 free crates for item 1310.

Explanation

The promotion in this exercise is defined in a [Condition Rule](#). This Rule can be verified:

14. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link..
15. Select **Rule No. 36** and choose the **Edit** action.




16. In the [Calculation Code](#) field on the **General** FastTab, the PROM_DISC code is selected. We use this code for our "same item" promotions.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.
17. The **Description** (**General** FastTab) makes clear what the promotion is about. It is shown on the order and can be printed on the invoice.
18. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
19. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 50000 (Source Type and Source No.) and is based on transactions with that customer (Based on Source is Member).
20. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the Classification Item OBZERO. Use the Lookup button to view this [classification](#).
21. On the **Others** FastTab:
 - In the **Reason Code** field, we selected *FREE_PROM*. This is why the line with the free 1310 items has this reason code.
 - We added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
22. On the [Rates](#) FastTab:
 - *CRATE* is selected as **Unit of Measure** (Quantity); the free items are given per crate.
 - In the **Minimum Quantity** field we entered 40.
 - The **Calculation Code** for the rule (PROM_DISC) is of the *Calculation Type* **Promotion (Discount)**. Due to that type, the 100.00 was automatically set in the **Rate Unit (Net%)** field and cannot be changed.



Walkthrough: Free promotion; 2 free prosecco on minimum 60 bottles wine

Article • 7/6/2023 • 6 min read

We want to promote our Prosecco Wine. With the Guildford Wholesalers (50000), we agreed that they get 2 bottles Prosecco for free with every 60 bottles of wine that they order. It does not matter what kind of wine is ordered, as long as the total is at least 60 bottles

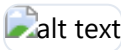
1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
2. Select **New** to create a new entry.
3. In the **Customer** field, enter the name Guildford Wholesalers.
4. Enter an **External Document No.**
5. Fill in lines:

Item	Quantity
3500-20	5
3550-20	3
3650	2

6. Choose the **Release** action.
7. Verify that the customer gets 2 bottles of Prosecco for free
8. Choose the **Reopen** action adjust the **Quantities** as needed.
9. Choose the **Release** action again and verify the results.

Explanation

The promotion in this exercise is defined in a [Condition Rule](#). This Rule can be verified:

10. Select the Search icon , enter **Sales and Purchase Condition Rules**, and then choose the related link..
11. Select **Rule No. 37** and choose the **Edit** action.
12. On the **General** FastTab, in the [Calculation Code](#) field , the *PROM_FREE* code is selected. We use this code for our "other item" promotions.
 - The *Calculation Period* for this code is **Order**. This means that the condition is calculated on each transaction.



13. The **Description (General FastTab)** makes clear what the promotion is about. It is shown on the order and can be printed on the invoice.
14. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
15. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 50000 (Source Type and Source No.) and is based on transactions with that customer (Based on Source is Member).
16. On the **Item** FastTab,
 - In the **Item Type** field, *Per Document* was selected. This means that the calculation of the condition is done on all the lines in the order.
 - We explained for which products the discount is applicable: all items that belong to the Classification Item WINE. Use the AssistEdit button to the view this [classification](#). In combination with the **Item Type Per Document** this means that all lines with WINE items will be taken in account.
17. On the **Others** FastTab:
 - In the **Reason Code** field, we selected *FREE_PROM2*. This is why the line with the free bottles has this reason code.
 - We added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
18. On the [Rates](#) FastTab:
 - *BOTTLE* is selected as **Unit of Measure** (Quantity); the minimum quantity is expressed in bottles. In our example, the Sales Unit of Measure was BOX. A box contains 6 bottles and the calculation converts boxes to bottles.
 - In the **Minimum Quantity** field we entered 60.
 - The **Calculation Code** for the rule (PROM_FREE) is of the *Calculation Type Promotion (Free Item)*. Due to that type, the 100.00 was automatically set in the **Rate Unit (Gross%)** and **Item Other** in the *Free Item Type* field. Both fields cannot be changed.
 - By selecting the **Recurring** field, the Recurring Quantity is by default filled with the Minimum Quantity, but you can change it as necessary.
 - In the **Free Item Type** field, *Item Other* was selected. In the **Free Item No.** field the Prosecco is selected. That is the Item we give for free.
 - The **Free Quantity** field is by default filled with 1, but you can change it as necessary. In our example, we set it to 2.



Walkthrough: Limit the promotion free item – Per Customer

Article • 7/3/2024 • 5 min read

We want to limit the promotion free items extended to our customer, S_Fragment. We agreed with S_Fragment to provide a free keg item 1080 for every 10 crate item that they purchase. There are two scenarios available – per customer and per rule.

The promotion in this exercise is defined in a condition rule. The following procedure defines how to create this rule.

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.

The **Sales and Purchase Condition Rules** page opens.

2. On the action bar, **New** to create a new entry.

The **Sales and Purchase Condition Rule Card** page opens.

3. On the **General** FastTab, in the **Calculation Code** field, the select *PROM_FREE* code.

We use this code for our 'mix & match' promotions.

4. On the **Customer/Vendor (Source)** FastTab, in the **Source Type** field, select *All Customers*.

5. On the **Item** FastTab, in the **Item Type** field, select *Per Document* and in the **Based on Item Type** field, select *Member*.

6. On the **Rates** FastTab, enter the following fields:

Field	Value
Unit of Measure Code (Quantity)	CRATE
Minimum Quantity	10
Recurring	selected
Free Item Type	Item Other
Free Item No.	1080
Free Quantity	1
Maximum Quantity Deal (per Source Member)	7
Maximum Quantity Deal	0

The following values depict that if you buy a minimum quantity of 10 crates, you will get one item 1080 for free.



When a quantity, for example, 7 is entered in the **Maximum Quantity Deal (per Source Member)** field and in the **Status** field, *Certified* is selected on the **General** FastTab of the **Sales and Purchase Condition Rule Card** page, the customer can avail the free item only within this mentioned quantity, when the associated sales order is released.

To calculate sales price for a customer using per customer:

7. Select the Search icon  , enter **Sales Orders**, and then choose the related link.

The **Sales Orders** page opens.

8. On the action bar, select **New** to create a new entry.

The **Sales Order** page opens.

9. On the **General** FastTab, in the **Customer No.** field, enter the name, *S_Fragment*.

10. On the **Lines** FastTab, enter the following fields:

Field	Value
No.	1010
Description	BEER CRONUS PREMIUM CRATE
Reason Code	SAL_ORDER
Location Code	BLUE-BOND
Quantity	70
Unit of Measure Code	CRATE
Unit Price Excl. VAT	16.00
Qty. to Ship	70

11. On the action bar, select **Actions > Functions > Calculate Drink-it Lines**.

No promotion free items are calculated on the **Lines** FastTab. This sales order is created for the second customer.

When creating a second sales order for the same customer that has already availed the free item, upon executing the **Calculate Drink-it Lines** action on the **Sales Order**, the customer will not get any promotion free item.

To delete the free items availed in a released sales order:

12. Open the associated sales order.

13. On the action bar, select **Release > Reopen**.

14. On the **Lines** FastTab, select the context menu button > **Delete Line**.

The availed free items get deleted.



 Note

You can now reopen the new sales order and execute the **Calculate Drink-it Lines** action to calculate the item on the **Lines** FastTab.



Walkthrough: Limit the promotion free item – Per Rule

Article • 7/3/2024 • 5 min read

We want to limit the promotion free items extended to our customer, S_Fragment. We agreed with S_Fragment to provide a free keg item 1080 for every 10 crate item that they purchase. There are two scenarios available – per customer and per rule.

The promotion in this exercise is defined in a condition rule. The following procedure defines how to create this rule.

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.

The **Sales and Purchase Condition Rules** page opens.

2. On the action bar, select **New** to create a new entry.

The **Sales and Purchase Condition Rule Card** page opens.

3. On the **General** FastTab, in the **Calculation Code** field, select *PROM_FREE*.

We use this code for our 'mix & match' promotions.

4. On the **Customer/Vendor (Source)** FastTab, in the **Source Type** field, select *All Customers*.

5. On the **Item** FastTab, in the **Item Type** field, select *Per Document* and in the **Based on Item Type** field, select *Member*.

6. On the **Rates** FastTab, enter the following fields:

Field	Value
Unit of Measure Code (Quantity)	CRATE
Minimum Quantity	10
Recurring	Selected
Free Item Type	Item Other
Free Item No.	1080
Free Quantity	1
Maximum Quantity Deal	70
Maximum Quantity Deal (per Source Member)	0

The value **70** in the **Maximum Quantity Deal** field depicts how many free items can be availed per rule.

To calculate sales order for a customer using per rule, follow the below mentioned steps.



7. Select the Search icon  , enter **Sales Orders**, and then choose the related link.

The **Sales Orders** page opens.

8. On the action bar, select **New** to create a new entry.

The **Sales Order** page opens.

9. On the **General** FastTab, in the **Customer No.** field, enter the name *S_Fragment*.

10. On the **Customer/Vendor (Source)** FastTab, in the **Source Type** field, select **All Customers**.

11. On the **Lines** FastTab, fill the value in following fields:

Field	Value
No.	1010
Description	BEER CRONUS PREMIUM CRATE
Reason Code	SAL_ORDER
Location Code	BLUE-BOND
Quantity	70
Unit of Measure Code	CRATE
Unit Price Excl. VAT	16.00
Qty. to Ship	70

 **Note**

Multiple customers can use various rules. The customer who releases the sales order first will receive the free items. The process operates on a first-come, first-served basis.

For example, customer A and customer B are working on a sales order and customer A releases the sales order first. In this case, Customer A is eligible to get the quantity mentioned in the **Maximum Quantity Deal** field on the **Sales and Purchase Condition Rule Card** page. Now customer B also releases the sales order, but since customer A was first, customer B is not eligible to avail anymore free items.

12. On the action bar, select **Actions > Functions > Calculate Drink-it Lines**.

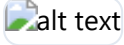
No promotion free items are calculated on the **Lines** FastTab.



Walkthrough: Monthly discount per HL

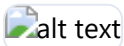
Article • 7/6/2023 • 5 min read

Next to the on-invoice discounts, we also agreed a monthly bonuses with the Selangorian Pub (20000). We give them an additional fee of 10.00 per hectoliter on the sales of our own beers. Verify the setup for such a discount. You can use it as an example to implement it yourself:

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
2. Select **Rule No. 23** and choose the **Edit** action.
3. In the [Calculation Code](#) the M_HL_DISC code is selected. We use this code for our monthly volume discounts.
 - The *Calculation Period* for this code is **Month**. This means that the condition is calculated on all transactions in one month.
4. The **Description (General FastTab)** makes clear what the discount is about. It is shown on the order and can be printed on the invoice.
5. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
6. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 20000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
7. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the Classification Item OB. Use the Lookup button to view this [classification](#).
8. On the Others FastTab, we added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
9. On the [Rates](#) FastTab: the 10.00 is set in the **Rate Unit (Price)** field and the HL is selected in the **Unit of Measure (Price)** field.

At month-end, we will be settle this bonus with a sales credit memo that is created in the Condition **Periodic Settlement Journal**. If you execute the next exercise, you can later use it in the settlement journal.

Exercise Monthly Discount

11. Change your Work Date to January 1st 2024 in [My Settings](#).
12. Select the Search icon  , enter **Sales Orders**, and then choose the related link.
13. Select **New** to create a **new** entry.
14. In the **Customer** field, enter the name Selangorian (20000).
15. Fill in lines:



Item	Quantity
1010	40
1280	6
1510	40


16. Choose the **Post (Ship and Invoice)** action.



Walkthrough: Quarter discount percentage on minimum sales

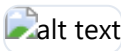
Article • 7/6/2023 • 6 min read

Each quarter, the Selangorian Pub (20000) can get a 2% Net discount on our own beers. But the sales of these beers during that period should be at least 1,000. Verify the setup for such a discount. You can use it as an example to implement it yourself:

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
2. Select **Rule No. 25** and choose the **Edit** action.
3. In the [Calculation Code](#) the Q_NET_DISC code is selected. We use this code for our quarterly net percentage discounts.
 - The *Calculation Period* for this code is **Quarter**. This means that the condition is calculated on all transactions in one quarter.
4. The **Description (General FastTab)** makes clear what the discount is about. It is shown on the order and can be printed on the invoice.
5. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
6. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 20000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
7. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the Classification Item OB. Use the Lookup button to view this [classification](#).
8. On the Others FastTab, we added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
9. On the [Rates](#) FastTab:
 - 1,000 is entered in the **Minimum Amount** field
 - the 2.00 is set in the **Rate Unit (Net%)** field

At quarter-end, we will be settle this bonus with a sales credit memo that is created in the **Periodic Settlement Journal**. If you execute the next exercise, you can later use it in the settlement journal.

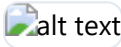
Exercise Quarter Discount

13. Change your Work Date to February 1st 2024 in [My Settings](#).
14. Select the Search icon  , enter **Sales Orders**, and then choose the related link.



- 15. Select **New** to create a new entry.
- 16. In the **Customer** field, enter the name Selangorian (20000).
- 17. Fill in lines:

Item	Quantity
1010	40
1280	6
1510	40

- 18. Choose the **Post (Ship and Invoice)** action.
- 19. Confirm the message for a related call entry if it pops-up.
- 20. Change your Work Date to March 1st 2024 in [My Settings](#).
- 21. Select the Search icon  , enter **Sales Orders**, and then choose the related link.
- 22. Select **New** to create a new entry.
- 23. In the **Customer** field, enter the name Selangorian (20000).
- 24. Fill in lines:

Item	Quantity
1010	40
1280	6
1510	40

- 25. Choose the **Post (Ship and Invoice)** action.



Walkthrough: Year discount net percentage on progressive minima

Article • 7/6/2023 • 5 min read


In Aptean Beverage Sales-Purchase Conditions, a **Progressive Discount** means:

- *One discount is granted according to the highest achieved minimum.*

With the Selangorian Pub (20000), we agreed that they get a yearly bonus for sales of our own bear:

- 1% on the net sales if they buy more than 60 hectoliter
- 2% on the net sales if they buy more than 70 hectoliter
- 3% on the net sales if they buy more than 80 hectoliter

Verify the setup for such a discount. You can use it as an example to implement it yourself:

1. Select the Search icon , enter **Sales and Purchase Condition Rules**, and then choose the related link.
2. Select **Rule No. 31** and choose the **Edit** action.
3. In the [Calculation Code](#) the Y_NET_PROGR code is selected. We use this code for our yearly progressive net percentage bonuses.
 - The *Calculation Period* for this code is **Year**. This means that the condition is calculated on all transactions in one year.
4. The **Description (General FastTab)** makes clear what the discount is about. It is shown on the order and can be printed on the invoice.
5. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
6. On the **Customer/Vendor (Source)** FastTab we defined that this discount will be given to customer 20000 (Source Type and Source No.) and based on transactions with that customer (Based on Source is Member).
7. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the Classification Item OB. Use the Lookup button to view this [classification](#).
8. On the **Others** FastTab, we added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
9. In the [Rates](#) FastTab we create three lines:
 - The first line has a **Minimum Quantity** of 60 and a **Rate Unit (Net%)** of 1.00
 - The second line has a **Minimum Quantity** of 70 and a **Rate Unit (Net%)** of 2.00.
 - The third line has a **Minimum Quantity** of 80 and a **Rate Unit (Net%)** of 3.00.



- In all lines, the HL is selected in the **Unit of Measure (Quantity)** field since the minimum is expressed in hectoliters.

At year-end, we will be settle this bonus with a sales credit memo that is created in the Condition **Periodic Settlement Journal**. If you execute the next exercise, you can later use it in the settlement journal.

Exercise Quarter Discount

15. Change your Work Date to April 1st 2024 in [My Settings](#).
16. Select the Search icon , enter **Sales Orders**, and then choose the related link.
17. Select **New** to create a new entry.
18. In the **Customer** field, enter the name Selangorian (20000).
19. Fill in lines:

Item	Quantity
1010	40
1280	6
1510	40


20. Choose the **Post (Ship and Invoice)** action.



Walkthrough: Vendor discount (Periodic) based on sales to customers


Article • 7/6/2023 • 5 min read

Besides our own beers, we also sell lagers and ales that we purchase from the Mortimor Brewery. They give us a yearly bonus of 5% net of what we sell to on premise customers. Verify the setup for such a discount. You can use it as an example to implement it yourself:

1. Select the Search icon , enter **Sales and Purchase Condition Rules**, and then choose the related link.
2. Select **Rule No. 40** and choose the **Edit** action.
3. In the [Calculation Code](#), the Y_NET_DISC code is selected. We use this code for our monthly volume discounts.
 - The *Calculation Period* for this code is **Year**. This means that the condition is calculated on all transactions in one year.
4. The **Description (General FastTab)** makes clear what the discount is about. It is shown on the order and can be printed on the invoice.
5. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
6. On the **Customer/Vendor (Source)** FastTab we defined that we will get this discount from Vendor 82000 and is based on transactions with customers that are part of the ONPREM classification.
7. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the Classification Item PBMORT. Use the Lookup button to view this [classification](#).
8. On the Others FastTab, we added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#). In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
9. In the [Rates](#) FastTab: the 5.00 is set in the **Rate Unit (Net%)** field.

At year-end, we will be settle this bonus with a sales credit memo that is created in the Condition **Periodic Settlement Journal**. If you execute the next exercise, you can later use it in the settlement journal.

Exercise Vendor Discount on Customer Sales

11. Change your Work Date to July 1st 2024 in [My Settings](#).
12. Select the Search icon , enter **Sales Orders**, and then choose the related link.
13. Select **New** to create a **new** entry.
14. In the **Customer** field, enter the name Selangorian (82000).
15. Fill in lines:



Item	Quantity
1010	40
1280	6
1510	40

16. Choose the **Post (Ship and Invoice)** action.



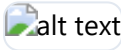
Walkthrough: Post accruals for periodic conditions

Article • 7/6/2023 • 4 min read

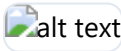
As a Finance Manager, you want to have a clear view on your profits and losses. At the end of the fiscal year, you don't want to be surprised by yearly bonuses that are posted in the last period. In your monthly reporting, you already want to include the impact of these periodical conditions.

- In the [Sales and Purchase Condition Calculations](#), you can select the *Post Accrual to G/L* field. We selected this field in our quarterly and yearly discounts.
 - When this field is selected, **expected condition ledger entries** will be created on shipment a receipt postings.
- In the [Sales and Purchase Condition Setup](#), you can select the **Automatic Accrual Posting** field. When selected, the expected condition ledger entries are automatically posted to the general ledger.
- In the [General Posting Setup](#), you can select the accounts where the accrual is posted to.

To create posting setup for condition accruals

1. Select the Search icon , enter **General Ledger Setup**, and then choose the related link.
2. Open card of the *Gen. Bus. Posting Group* and *Gen. Prod. Posting Group* combination you want to setup accrual accounts for.
3. Fill in the fields as necessary. Hover over a field to read a short description.

To post condition accruals manually

1. Select the Search icon , enter **Post Condition Accrual to G/L**, and then choose the related link.
2. Post condition accruals to the general ledger manually by running the batch job. When you run this batch job, general ledger entries are created on the basis of (expected) condition ledger entries. You can post the entries so that they are summarized per condition rule.

Note

Accruals in Aptean Beverage Sales-Purchase Conditions are calculated with the assumption that the highest possible discount or lowest possible charge will be reached at the end of the period.




Walkthrough: Create condition ledger entries from history

Article • 7/6/2023 • 2 min read

When you setup a [Rule](#) for a periodic condition, the program already creates Condition Ledger Entries when documents (where that rule is applicable) are posted. In the **Settlement** of such a condition, these entries are the basis for the suggested amounts to settle with your customers and vendors. There can be circumstances where the period for your periodical condition has already started. Documents are already posted, but you still want to be able to apply the rule. Some examples:

- You were still negotiating an agreement with your customer or vendor at the beginning of the period.
- The rule was not certified at the beginning or during the period.
- A customer, vendor or item was not included in the correct classification or group.

For all these cases, you can use the Condition Journal to create the missing Condition Ledger Entries:

1. Select the Search icon  , enter **Condition Journal**, and then choose the related link.
2. Choose the **Suggest Periodic based on history** action.
3. On the **Suggest Periodic based on history** page, fill in the fields as necessary. Hover over a field to read a short description.
4. Select OK.
5. Choose the **Post** action to create the condition ledger entries.



Walkthrough: Settle the periodic conditions


Article • 7/6/2023 • 13 min read

Note

Before you are going to settle your periodic conditions, we advise to run the **Suggest Periodic based on history** batch. This will prevent you for missing transactions in the settlement.

Settle the periodic conditions of the exercises



With the data of the exercises we can do a new exercise on the settlement of periodic conditions. If you not execute them yet, you still can do them now.

- [Exercise Monthly Discount](#)
- [Exercise Quarter Discount](#)
- [Exercise Year Discount](#)
- [Exercise Vendor Discount on Customer Sales](#)
- Select the Search icon , enter **Condition Periodic Settlement Journal**, and then choose the related link.
- Choose the **Suggest Settlement Lines** action.
- On the **Suggest Periodic Journal Lines** page, fill in the fields as necessary. Hover over a field to read the tooltip.
- Choose OK.
- On each line in the **Condition Periodic Settlement Journal** page, in the **Amount** field, the suggested discount is shown. The **Status** field indicates:
 - Skipped:**
 - The minimum criteria of the rule have not been met. Settlement documents will not be created for lines with this status. (Or)
 - The source documents are not completely invoiced yet.
 - Suggested:**
 - The minimum criteria of the rule have been met. Settlement documents will be created for lines with this status.
 - Processing:**
 - The settlement document is created for the line, but not posted yet.
Hover over a field to read the tooltip.
- Choose the **Create Settlement Document(s)** action to create documents for the selected (Suggested) journal lines.




- Choose the **Post Reverse Accruals (Skipped)** action to reverse the accruals that were posted for condition rules that will not be settled by a credit memo or invoice.
- Post the Credit Memos and Invoices that were created by the batch. Accruals will be reversed with this action.

Exercise Settlements – January 2024 Monthly

1. Change your Work Date to January 31st 2024 in [My Settings](#).
2. Select the Search icon , enter **Condition Periodic Settlement Journal** and then choose the related link.
3. Choose the **Suggest Settlement Lines** action.
4. On the Suggest Periodic Journal Lines page, fill in
 - Ending Date = *January 31st 2024*
 - Starting Date = *January 1st 2024*
5. Choose the OK button.
6. A line with the Status **Suggested** is created according to **Rule 23**, the Month Discount Own Beer – 10.- / HL
 - *The Amount is 61.68. In January 2024 we posted 6 KEG and 40 CRATE of own beers with a total volume of 6.168 HL (Quantity field). The discount we agreed was 10.00 per HL, so $10.00 * 6.168 = 61.68$.*
7. Choose the **Create Settlement Document(s)** action to create documents for the selected (Suggested) journal lines.
8. Choose the OK button on the **Create Settlement Documents** page. The Status of the line is now **Processing**.
9. Select the Search icon , enter **Sales Credit Memos** and then choose the related link.
10. Verify and Post the Credit Memos that was created by the batch. Accruals will be reversed with this action.

Exercise Settlements – March 2024 Quarterly

14. Change your Work Date to March 31st 2024 in [My Settings](#).
15. Choose the Search icon  alt text, enter **Condition Periodic Settlement Journal** and then choose the related link.
16. Choose the **Suggest Settlement Lines** action.
17. On the **Suggest Periodic Journal Lines** page, fill in
18. Ending Date = *March 31st 2024*
19. Starting Date = *January 1st 2024*
20. Choose the OK button. A message will pop-up that tells you that suggested lines will be created that are flagged **On Hold**. Confirm the message to review the rule for the On Hold lines.
21. *It is the Quarter Discount that is flagged. The reason is that this is a Net% discount where Monthly discounts with a lower level position are not posted yet.*



22. Close the **Sales and Purchase Condition Rules** List.

- A line with the Status **Suggested** is created according to **Rule 23**, the Month Discount Own Beer – 10.- / HL
- A line with the Status **Skipped** is created according to **Rule 25**, the Quarter disc. Net 2% - Min. sales 1000,- OB.
- *Skipped, and On Hold, because the monthly settlements for February and March were not executed yet.*

23. Choose the **Create Settlement Document(s)** action to create documents for the selected (Suggested) journal lines.

24. Choose the OK button on the **Create Settlement Documents** page. The Status of the line is now **Processing**.

25. Select the Search icon , enter **Sales Credit Memos** and then choose the related link.

26. Verify and Post the Credit Memos that was created by the batch. Accruals will be reversed with this action.

27. In the **Condition Periodic Settlement** Journal, delete the Skipped line.

28. Choose the **Suggest Settlement Lines** action.

29. On the **Suggest Periodic Journal Lines** page, fill in

- *Ending Date = March 31st 2024*
- *Starting Date = January 1st 2024*
- *Calculation Code = M_HL_DISC (now, we first finish the monthly discounts before we start with the quarterly).*

30. Choose the OK button.

31. Choose the **Create Settlement Document(s)** action again to create the Sales Credit Memo.

32. Post the Sales Credit Memo.

33. Choose the **Suggest Settlement Lines** action.

34. On the **Suggest Periodic Journal Lines** page, fill in

- *Ending Date = March 31st 2024*
- *Starting Date = January 1st 2024*
- *Calculation Code = Q_NET_DISC (now, we the quarterly discount).*

35. Now, the line for the Quarter Discount is **suggested** with an amount of 97.94:

- The **Item Amount Actual (LCY)** in the lines shows the base amount for the 2% discount calculation.
- Open the details of this amount to verify the Item Ledger Entries.
- Open the details of the Sales Amount (Actual) of the first entry (889.75) to verify the Value Entries. Verify that entries for discounts with a lower position level are deducted from the sales amount of the Item.

36. Create and Post the Settlement Document.

Exercise Settlements – December 2024 Yearly



49. Change your Work Date to December 31st 2024 in [My Settings](#).

50. Select the Search icon , enter **Condition Periodic Settlement Journal** and then choose the related link.

51. Choose the **Suggest Settlement Lines** action.

52. On the **Suggest Periodic Journal Lines** page, fill in

- *Ending Date = December 31st 2024*
- *Starting Date = January 1st 2024*
- *Calculation Code = M_HL_DISC (we first finish the remaining monthly discounts).*

53. Choose the **Create Settlement Documents** action again.

- The Journal has two suggested lines, one for April and one for July. In the Options of the Create Settlement Documents, you can choose to have one credit memo for the total or two credit memo's for each period by selecting the **By Period Date** field.
- You can verify the differences in the results of the **Header and Lines Summarize Results** in the **Create Settlement Documents** page by creating documents multiple times. When you delete the created documents, the program allows you to create them again.

54. Post the settlement documents that you created.

55. Repeat the process for the Q_NET_DISC Calculation Code.

56. Now we can start with our yearly conditions. Choose the **Suggest** action in the journal:

- *Ending Date = December 31st 2024*
- *Starting Date = January 1st 2024*
- *The Calculation Code can be left [blank]. Only the yearly conditions are still open for settlement.*

57. Two lines are created in the journal:

- A **Suggested** line for the agreement that we have with our Vendor Mortimor (82000) with an amount of 227.21.
- We received a credit memo from Mortimor for this discount with a total amount of 230.00. We are not going to argue about this small difference and accept it:
 - Change the **Unit Price** in the line to 230.00.
 - The **Status** of the line is now changed to Open.
- A **Skipped** line for the Year bonus agreement with our Customer Selangorian Pub (20000). The target for the bonus was not met. The **Quantity Actual (Minimum)** shows a total of 30.84, where the **Minimum Quantity** field is 60 ([Personalize](#) your page if it is missing).

58. Choose the **Create Settlement Documents** action for the suggested line.



- Include Open in the **Status Filter** of the Create Settlement Documents page.
- The **Suggested Journal Line** for Mortimor has the Document Type Purchase Credit Memo. The Settlement Document that is created is.

59. Fill in a *Vendor Cr. Memo No.* on the Purchase Credit Memo and choose the **Post** action.

60. Now the **Skipped** line is still in the Journal. Since the accruals that were posted for the agreement will not be reversed by a settlement document, we need to do that manually. Choose the **Post Reverse Accruals (Skipped)** action and confirm the message to reverse them.




Walkthrough: Allocate a fixed amount discount

Article • 7/6/2023 • 7 min read

It is not exceptional that trading companies in the beverage industry receive a lumpsum bonus from a supplier at for instance year-end. This bonus has impact on your margin and you might want to allocate it as (negative) costs to sales transactions with the products involved. Aptean Beverage Sales-Purchase Conditions can support this by setting up a condition rule for it. This rule can be created:

- Prior to the period to which the bonus relates
 - When we settle the bonus, the entries where we allocate the bonus to already exist.
- Afterwards, when the amount of the bonus is known
 - When we settle the bonus, the entries where we allocate the bonus to do not exist yet. We have to create them before the settlement. See [Walkthrough: Create Condition Ledger Entries from history](#).

We receive such a year-end bonus from the Mortimor Brewery. This year, the amount is 1.000.

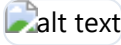
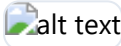
1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
2. Select **Rule No. 64** and choose the **Edit** action.
3. In the [Calculation Code](#) field on the **General** FastTab, the Y_NET_DISC code is selected. We use this code for our yearly net percentage bonuses.
 - The *Calculation Period* for this code is **Year**. This means that the condition is calculated on all transactions in one year.
4. The **Description (General FastTab)** makes clear what the discount is about. It is shown on the order and can be printed on the invoice.
5. The rule has the Certified **Status**. Which means that it will be used in transactions that meet the criteria for the rule. Rules with other statuses will never be used in transactions.
6. On the **Customer/Vendor (Source)** FastTab we defined that we will get this discount from Vendor 82000 and is based on transactions with customers that are part of the ONPREM classification.
7. On the **Item** FastTab, we explained for which products the discount is applicable: all items that belong to the [Classification](#) Item PBMORT. Use the Lookup button the view this classification.
8. On the **Others** FastTab, we added an additional criterium for the rule. It is only applicable on sales lines with a [Reason Code](#) that belongs to the SALES [group](#).
9. In the [Rates](#) FastTab, the 1.00 is set in the **Rate Unit (Net%)** field.



 Note

In this example we have set the rate to 1.00%. Since it is a lumpsum, we don't exactly know what the percentage should be. But in our example we estimate it will be about 1% of the total sales. By setting this percentage, we can for instance create accruals on the shipments that we post.

We received the credit memo with the bonus from Mortimor. Now we can use the **Periodic Settlement Journal** to create a credit memo in the system, including the allocation to the sales transactions.

11. Select the Search icon  , enter **Condition Periodic Settlement Journal**, and then choose the related link.
12. Choose the **Suggest Settlement Lines** action.
13. On the **Suggest Periodic Journal Lines** page, fill in *Ending Date* **December 31st 2022**, *Starting Date* **January 1st 2022** and select *Rule No.* **64** and then choose the OK button.
14. In the Journal Line that is created for the rule, fill in **1,000.00** in the *Unit Price* field.
15. Choose the **Create Settlement Document(s)** action and then choose the OK button.
16. Select the Search icon  , enter **Purchase Credit Memos**, and then choose the related link.
17. Open the Credit Memo that was created for Mortimor Brewery and verify the document.
18. Enter a *Vendor Cr. Memo No.* and choose the **Post** action.
19. Verify the Posted Credit Memo.



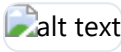
Walkthrough: Mix & Match Mandatory Item Functionality

Article • 6/17/2024 • 7 min read

We want to promote our beers in crates. With the Guildford Wholesalers (50000), we agreed that they get glasses which the customer can choose between different sizes for free with every 10 crates that they order as long as minimum three crates of our Cronus Blond 8.5% beer are bought.

Setup of the new sales and purchase condition rule.

The promotion in this exercise is defined in a condition rule. The following procedure defines how to create this rule.

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.
The **Sales and Purchase Condition Rules** page opens.
2. Select **New** to create a new entry.
The **Sales and Purchase Condition Rule Card** page opens.
3. On the **General** FastTab, in the **Calculation Code** field, the *PROM_MIX* code is selected. We use this code for our 'mix & match' promotions.
The **Calculation Period** for this code is *Order*. This means that the condition is calculated on each transaction.
On the **General** FastTab, the **Description** field, explains what the promotion is about. It is shown on the order and can be printed on the invoice.
4. On the **Customer/Vendor (Source)** FastTab, define the discount that will be given to customer 50000 (Source Type and Source No.) and is based on transactions with that customer (Based on Source is Member).
5. On the **Item** FastTab, explains for which products the discount is applicable.
The calculation is done per document and based on all the items that belong to the classification other : *ALLBC*.
Use the Lookup button to view this classification.
6. On the **Others** FastTab, in the **Reason Code** field, select *FREE_PROM2*.
This is how the free item line in the sales order will have this reason code.
We added an additional criteria for the rule. It is only applicable on sales lines with a **Reason Code** that belongs to the sales group. In our example, we did not set this reason code by ourselves. It was automatically inserted from the [Aptean Beverage Foundation Management](#).
7. On the **Rates** FastTab, in **Unit of Measure (Quantity)** field select *CRATE*; the free items are given per crate.
In the **Minimum Quantity** field enter *10*.
The calculation code for the rule (PROM_MIX) is of the *Calculation Type Promotion (Free Item)*. Due to that type, the 100.00 was automatically set in the **Rate Unit (Net%)** field and cannot be changed.
In the **Free item Type** field, enter *Mix & match*.
The **Free Quantity** field, is set as *1*.
8. On the **Rates** FastTab, execute the **Edit Free Mix & Match Item Rates** action.
The **Sales and Purchase Condition Rates Mix & Match** page opens.
9. Enter the following fields:



Free Item No.	Free Item Quantity per (relative weight)
5033	2
5050	2

10. Close the **Sales and Purchase Condition Rates Mix & Match** page.

11. On the **Rates** FastTab, execute the **Edit Mix & Match Item Mandatory Rates** action.
The **Sales and Purchase Condition Combined Minimum & Mandatory** page opens.

12. Enter the following fields:

Item No.	Unit of Measure Code (Quantity)	Minimum Quantity
1210	CRATE	3

13. On the **General** FastTab, change the **Status* field value to *Certified*.
 This indicates that it will be used in transactions that meet the criteria for the rule.,
Rules with other statuses will never be used in transactions.

To execute the newly created sales and Purchase condition Rule:

14. Select the Search icon  , enter **Sales Orders**, and then choose the related link.

The **Sales Orders** page opens.

15. Select **New** to create a new entry.

The **Sales Order** page opens.

16. On the **General** FastTab, in the **Customer No.** field, enter the name *Guildford Wholesalers*.

17. In the **External Document No.** field, enter the relevant value.

18. On the **Lines** FastTab, fill in the following fields:

No.	Quantity
1010	10

19. On the action bar, select **Release**.

20. Verify that, there is no pop-up for undefined mix & match promotion lines. The mandatory item is not specified in the sales order with the minimum quantity of three crates.

21. Select the **Reopen** action and change the Quantity for 1010 to seven, and add item 1210 with Quantity three to the sales lines.

22. Select the **Release** action.

23. Verify that the pop-up appears for undefined mix & match promotion lines.



24. On the action bar, select **Actions > Functions > Get Mix & Match Promotion Lines**.

The **Promotion Item Mix & Match Selection (Sales and Purchase)** page will open where the items defined in the rule will appear and the quantity can be defined, choose one or both items.

25. Close the **Promotion Item Mix & Match Selection (Sales and Purchase)** page.

Item specified in the mix & match will be added on the sales order.

Verify the reason code contains the value *FREEPROM2*.

26. Release the sales order.

Verify the mix and match pop-up doesn't appear during the release (Mix & Match defined in the previous step).



Walkthrough: Mix & Match Combine Item Functionality

Article • 6/19/2024 • 6 min read

We want to promote our beers in crates. With the Guildford Wholesalers (50000), we agreed that they receive a free item when purchasing a combined list of items meeting a minimum quantity.

Setup of the new sales and purchase condition rule.

The promotion in this exercise is defined in a condition rule. The following procedure defines how to create this rule.

1. Select the Search icon  , enter **Sales and Purchase Condition Rules**, and then choose the related link.

The **Sales and Purchase Condition Rules** page opens.

2. On the action bar, select **New** to create a new entry.

The **Sales and Purchase Condition Rule Card** page opens.

3. On the **General** FastTab, in the **Calculation Code** field, select *PROM_FREE*.

We use this code for our free item promotions.

The **Calculation Period** for this code is *Order*.

This means that the condition is calculated on each transaction.

4. In the **Description** field, specify the description of the rule.

It makes clear what the promotion is about and is shown on the order and can be printed on the invoice.

5. On the **Customer/Vendor (Source)** FastTab, define that this discount will be given to customer 50000 (Source Type and Source No.) and is based on transactions with that customer (Based on Source is Member).

6. On the **Item** FastTab, explain for which products the discount is applicable.

The calculation is done per document and based on combined items specified in the **Based on Item Type** field.

7. On the **Others** FastTab, in the **Reason Code** field, select *FREE_PROM2*.

This is how the free item line in the sales order will have this reason code.

We added an additional criteria for the rule.

It is only applicable on sales lines with a **Reason Code** that belongs to the sales group.

In our example, we did not set this reason code by ourselves. It was automatically inserted from the Aptean [Beverage Foundation Management](#).

8. On the **Rates** FastTab, in **Unit of Measure Code (Quantity)** field, *CRATE* is selected; the free items are given per crate.

In the **Minimum Quantity** field, enter *10*.

The **Calculation Code** for the rule (*PROM_FREE*) is of the *Calculation Type Promotion (Free Item)*. Due to that type, the 100.00 was automatically set in the **Rate Unit (Net%)** field and cannot be changed.

In the **Free Item** field, enter *Item Other*.

In the **Free item No.** field, enter *1000*.

The **Free Quantity** is set as *1*.



9. On the **Rates** FastTab, execute the **Edit Combined Minimum Rates** action.

The **Sales and Purchase Condition Minimum & Mandatory** page opens.

10. Enter the following items:

Item No.	Unit of Measure Code (Quantity)
1010	5
1210	5

11. Close **Sales and Purchase Condition Minimum & Mandatory** page.

12. On the **General** FastTab, change the **Status** to *Certified*.

It signifies that it will be used in transactions that meet the criteria for the rule and rules with other statuses will never be used in transactions.

To execute the newly created Sales and Purchase condition rule:

13. Select the Search icon  , enter **Sales Orders**, and then choose the related link.

The **Sales Orders** page opens.

14. Select **New** to create a new entry.

The **Sales Order** page opens.

15. On the **General** FastTab, in the **Customer Name** field, enter the name *Guildford Wholesalers*.

16. In the **External Document No.** field, enter the relevant value.

17. On the **Lines** FastTab, fill in the following fields:

No.	Quantity
1010	5
1210	5

18. On the action bar, select the **Release** or **Calculate Drink-it Lines** action.

19. Verify that, item 1000 has been added to the sales order.

20. Select the **Reopen** action and change the Quantity for 1010 to 2, and for item 1210 change the quantity to 3 on the sales lines.

21. Select the **Release** action.

22. Verify that, item 1000 is no longer added to the sales order due to the changing of the quantities in the sales order and not meeting the sales and purchase condition any longer.



Known-issues

Article • 1/28/2026 • 1 min read

The table below lists known issues identified across releases. We are actively investigating and resolving them as part of our commitment to continuous improvement.

ID	Description	Status	Found in version	Fixed in version
340170	The system fails to create a condition periodic settlement journal line with the correct amount when the sales and purchase condition rule contains rates with different unit of measures.	Under investigation	2601.0.0.0	

