



Documentation: **Trade**

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1 Introduction

Welcome to the official Trade module manual.

The Dynavision Trade module provides a collection of handy tweaks and improvements that will make the wholesale or trade business even more smooth.

- Minimum order fee on purchase orders help your order takers optimize their purchasing.
- Recurring sales lines per customer make it easy for your inside salespeople to quickly note orders. Even when they don't know that specific customer's preferred brands they will always get it right because they will have the right customer assortment right in front of them!
- You can setup popups and notifications per document type (eg sales order, sales quote, blanket order, invoice, ...) that help your employees with specific reminders and info's. You choose the starting and ending dates for these notifications and you can even have them printed on documents.
- Improve your collective invoicing by tailoring it to your customers' needs. You define rules on how invoices are grouped, what group label is added etc. No custom code needed, simply add the right rules and parameters.
- Many more improvements!

2 Installation

2.1 Extension

The Dynavision Advanced Pricing & Discounts module is a separate Business Central extension.

1. Choose the search icon, enter **Extension Management**, and then choose the related link.
2. Choose **Manage** in the Action bar on the page and choose action **Extension Marketplace**.
3. In the search bar, enter **Dynavision Trade** and install this app.

3 Extension on Item List Page

In order to have a clear indication of the current inventory of the items in the different Unit of Measures, the item list page has been extended with following columns:

- The **inventory, calculated in the Sales Unit of Measure**, together with the unit of measure code used when the item is sold.
- The **inventory, calculated in the Purchasing Unit of Measure**, together with the unit of measure code used when the item is purchased.

Remark: the calculated inventory values will always display a rounded down number.

4 Advanced Search functionality

4.1 Item search - item description

In Dynavision Trade, the search functionality on sales lines on the **Description** field is enhanced.

This functionality makes it possible to easily add items by using the **Item description** and entering a certain search input in a sequence.

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. Navigate to the tab **Item Search**.
3. In the field **Search Method**, select the algorithm that needs to be applied when searching items by entering a description on documents.
There are two search algorithms that are available.
 - a. **All words in any sequence**
This will return items containing all search words, in any order.
 - b. **All words in input sequence**
This will return items containing the search words in the entered order only.
4. After specifying this search method, and entering a value, in *e.g. a sales order*, in the description field, the added input will be converted to a filter that is used by Business Central to find the corresponding items.

4.2 Item search – item reference

In Dynavision Trade, the search functionality on sales lines on the **Reference** field is enhanced.

This functionality makes it possible to easily add items by using the **Item Reference** and entering a certain input in the field.

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. Navigate to the tab **Item Search**.
3. There are two options that can be enabled for the **Search by reference**.
 - a. **Search by Reference - Ignore special characters**
Enable this option to ignore special characters when searching item references on sales lines.
Example given: searching for REF01 will return REF/01 and REF-01.02.

b. Search on All References

Enable this option to search item references from all vendors and customers.

5 Barcode Worksheet

1. Choose the search icon, enter **Barcode Worksheet**, then choose the related link.
2. Use the **Barcode Worksheet** to assign barcodes in bulk to items.
 - a. **Item No.**
Choose the item no. to which a barcode needs to be assigned.
 - b. **Unit of Measure Code**
Select the Unit of Measure code to which the barcode needs to be assigned.
 - c. **Decimal Delimiter**
If the barcode scanner, used for scanning the barcode of the documents, uses a Decimal Delimiter, specify this delimiter in this field in order to exclude all information before this specified prefix from the scanned barcode by the scanner.
 - d. **Bar Code**
Specify the barcode that needs to be assigned. This can be inserted manually or by scanning the code with the barcode scanner.
3. Choose the action **Get Items** to import all items that have no barcode assigned. The Boolean **Only Items without bar code** is by default enabled.
4. Choose the action **Apply** in order to save the specified barcode for the specified item and Unit of Measure. *The line to which the barcode is assigned will be removed from the lines on the page.*
5. In case all items were fetched, using the action **Get Items**, it is possible to apply the filter **With or without barcode** by choosing the action.

6 Periodic recurring sales documents

6.1 Recurrence schedules

The recurrence schedules have been extended to support a simple date formula definition. This allows for the dynamic creation of recurrence schedules that can be applied to blanket orders.

1. Choose the search icon, enter **Recurrence schedules**, then choose the related link.
2. Choose the action **Get default data** to create some default recurrence schedules that can be adapted and then used on the blanket orders for the creation of recurring sales orders.
3. Use the column **Date Formula** to specify the date formula that needs to be used for the recurrence schedule.
4. In order to use these on a blanket order, the option **Use on Blanket Order** has to be activated.

6.2 Usage on Blanket Sales Order

Create a Blanket Sales Order for the customer, for which recurring sales orders need to be created, based on a recurrence schedule.

In the fasttab **Recurring Orders**, the information for the recurrence can be specified.

- **Starting Date**
Specifies from which date the new recurring sales orders can be created.
- **Ending Date**
Specifies until which date the new recurring sales orders can be created.
- **Frequency**
Specifies the recurrence schedule that will be used to create new recurring sales orders. The set date formula in the selected recurrence schedule will be used to calculate the Next Order Date.
- **Next Order Date**
Specifies the next date that a new sales order will be created. This field is automatically updated based on the recurrence details on the order.

Once these parameters are configured, the lines need to be added to the Blanket Sales Order. The field **Recurring quantity** will appear. This is the quantity that will be added on the created recurring sales orders. This will be filled in with the quantity on the line. When the quantity is changed after this, the recurring quantity will have to be adjusted manually.

Remark: when linked reusable packaging lines or contributions are noted on the lines, changing the recurring quantity on the main item will not adjust the quantity of these linked items automatically. This needs to be changed manually.

On the Blanket Sales Order card, the action **Make Order** will execute a check. If there are recurrence schedule parameters configured on the card, a message will be shown, to ask if

the system needs to create a recurring sales order instead. If yes, the report page opens to create the recurring sales order.

On the Blanket Sales Order List page, the action **Create Recurring orders** is added. Choose the option to open the report page.

On the report page, following things need to be specified in order to create the recurring sales orders.

- **Date formula**
Specify the date formula for creating the period for which to create the sales orders.
- **Starting Date**
Specify the starting date for the period for which the sales orders need to be created. The report includes blanket orders with the **next order date** value on this date, or after this date.
- **Ending Date**
Specify the ending date for the period for which the sales orders need to be created. The report includes blanket orders with the **next order date** value on this date, or before this date.
- **Document Type**
This is a filter set on the document type for which the report is run. This will be set to Blanket Order and does not need to be changed.
- **No.**
If the report needs to be run for a blanket sales order in particular, the number of that order can be specified in this field.
- **Sell-to Customer No.**
If the report needs to be run for blanket sales orders or a particular customer, the number of that customer can be specified in this field.

Choose **OK** to create the Sales orders. The report will run, and the resulting sales orders will be shown in the **Sales orders** list page.

***Remark:** the report to create the recurring sales orders can be scheduled in the job queue. Using the date formula, the correct blanket sales orders will result in a recurring sales order that can be processed.*

6.2.1 Recurring Sales order

After executing the action to create the recurring order, using the report page, the order will be created and can be shipped.

***Remark:** on the recurring order, when editing the quantity, the unit price will not be changed, as this is the price from the sales blanket order.*

After shipping the order, the Next order date on the linked Blanket sales order will be updated as well as the last shipping date.

6.2.2 Copy document

When a Blanket Sales Order with a configured recurrence schedule is used as a base to copy from, and the option **Include header** is enabled, the recurrence information will also be copied to the newly created Blanket Sales Order.

Remark: the **Next Order Date** will not be copied from the source document. Make sure to fill in this information, or recalculate by editing the information in either Starting date, Ending date or Frequency.

6.2.3 Archive

When the Blanket Sales order is archived with the action **Archive Document**, the recurrence settings (starting and ending date and frequency) are also archived.

7 Multiple payment methods on a sales or service document

It is possible to register multiple payment methods on a sales or service document.

Example given, one part of the document is paid by card, the other part of the document is paid by cash.

7.1 Setup

1. Navigate to the **General Journal templates** page and create a new journal template (and an underlying batch) of **Type payments**.
Be sure to not specify a Number Series as the entries created with this template will have the same document number as the posted sales/service invoice.
2. Navigate to the **Sales & Receivables setup** page.
3. In the **Multiple Payment Methods Per Document**, fill in the necessary fields.
 - a. **Multiple Payment: Payment Jnl Template Name**
This value will be used to post the payment journal lines that will be generated when using multiple payment methods on one document.
*The journal must be of the type **Payment**.*
 - b. **Multiple Payment: Payment Jnl Template Batch**
This value will be used to post the payment journal lines that will be generated when using multiple payment methods on one document.
 - c. **Multiple Payment: Application Jnl Template Name**
This value will be used to apply the remaining open entries that were generated when using multiple payment methods on one document.
 - d. **Multiple Payment: Application Jnl Template Batch**
This value will be used to apply the remaining open entries that were generated when using multiple payment methods on one document.
4. Choose the action **Payment Methods**, which can be found by choosing the action **Payments** in the action bar of the page.
5. Specify all possible payment methods, fill in all the necessary fields and the corresponding balance account numbers.

*Remark: if the Dynavision Layouts module is installed, navigate to the **Text Constants** page to set up a text constant for AMOUNTPAID. This Text Constant will be used on the printed document of the posted sales/service invoice to show the amount that is already paid on the document.*

How the Text Constants need to be set up is documented in the Dynavision Layout manual.

7.2 Usage on sales or service documents

It is possible to register the payments made to a document on the sales or service document in the **Payment Methods Tab**.

In this tab on the document, it is possible to register different payments with their corresponding amount.

1. Navigate to the sales or service document (*e.g. sales order*) to which the payments need to be registered.
2. Go to the **Payment Methods Tab** and add a line for each payment that has been received for the document.
 - a. **Payment Method Code**
Select the payment method that has been used for the payment on this document.
 - b. **Amount**
Fill in the amount that has been paid with the selected Payment Method.
 - i. Using the action **Fill remaining Amount** the remaining outstanding amount for the document can be automatically calculated and filled in for the current payment method line. This action is available when choosing **Actions** in the **Payment Methods Tab**.
 - c. **Payment Date**
Specifies the date on which the payment has been received/registered.
 - d. **Currency Code**
Indicates the currency code for the payment.
Remark: only the Local Currency is supported for now.
 - e. **Verified**
indicates if the payment is verified when a payment method is used that is linked to a payment terminal.
Remark: when a payment line is verified, the line cannot be deleted.

When the document is posted and the invoice is created from this document, the registered payments will be posted automatically.

7.2.1 Posting of payments with combine shipments

If there are sales orders with linked payments and the combine shipment functionality is activated (*in the customer card of the customer for which the sales orders are created, or in the header of the sales orders*), it is possible to use the **(Advanced) Combine shipments** functionality to create the invoice, including the different shipment lines for the sales orders.

The result of the combine shipments functionality is the creation of a single invoice including different sales shipments. This invoice can be posted.

The linked payments that are registered on the sales orders that are combined on the invoice will however not be posted automatically.

*Remark: the sales orders with the linked, unposted payments will not be deleted when the task **Delete Invoiced Sales Orders** is executed.*

In order to post the payments that are linked on a sales or service order, choose the search action and enter **Reconciliate Unposted Payments**. *For service, the action is called **Reconciliate Unposted Payments (Service)***. Choose the related task.

Fill in the needed filters to run the task and choose **OK**.

The payments will be posted, and the sales order is complete. Once this task has run, it is possible to delete the orders, either manually or by running the **Delete Invoiced Sales Orders** task (*for service, the task is called **Delete Invoiced Service Orders***).

8 Processing invoiced payments in the case of collective billing

When Sales Invoices are created by using the function **Get Shipment Lines...** on the invoice, or by using the action (**Advanced**) **Combine Shipments**, it is possible that there are unposted payments linked to the orders that are combined on the invoice.

The Payment lines from the orders are not transferred to the combined invoice, meaning that they cannot be posted on the invoice on which the linked orders are included.

*Remark: linked orders can also not be deleted when there are unposted payments noted on the order (either manually or using the report **Delete Invoiced Sales Orders**).*

To make it possible to process these payments on the linked orders, in the Trade module, an extra functionality has been added. The posting of the linked payments can be done through a newly implemented report. This makes it possible to post and close the linked orders and further process payments on the combined invoice if needed.

Use the **Reconciliate Unposted Payments** function to process open payment lines linked to an already invoiced sales order.

1. Choose the search icon, enter **Reconciliate Unposted Payments**, then choose the related link.
2. On the page that opens, specify the options and filters in order to post the desired payments.
 - a. **Auto apply remaining open entries**
When enabled, after the report has posted all payments and refunds per sales order, this will attempt to apply the new remaining open entries.
 - b. **Filter: Posted Sales Invoice Line and Filter: Sales Order**
Set up the filters needed to post the desired payments and refunds.
3. After selecting the options and filters, choose **OK** to post the payment lines.
4. After the needed payment lines are posted, it is possible to delete the invoiced sales orders. This can be done either manually or by using the report **Delete Invoiced Sales Orders**.

Remark: it is not necessary that the entire sales order has been paid in full using the payment lines. Once there are no more unposted payment lines present on the sales order, the order can be deleted, and the remaining amount can be settled on the sales order.

9 Advanced Combine Shipments

The **Advanced Combine Shipments** is used to structure created combine shipment invoices, based on different parameters. *Example given: split per location, per payment method,...*

9.1 Advanced Combine Shipment Methods

It is possible to define different methods to use when executing the Advanced Combine Shipments. These created methods can be assigned at customer level.

1. Choose the search icon, enter **Advanced Combine Shipments Methods**, then choose the related link.
2. Add lines for the different methods that need to be supported by the system.
 - a. **Code**
Specify the code that is used to identify the Advanced Combine Shipments method.
 - b. **Description**
Specifies the description of the Advanced Combine Shipments method.
 - c. **Get Header Values From**
Specifies how the created invoice will be structured. The lines combined per order or combined per shipment.
The options are:
 - i. Order, and
 - ii. Shipment.
 - d. **From Date Formula**
Specifies the date formula that is used when combining invoices.
Example given: -CM: all shipment lines of the current month will be fetched for a specific customer using the specified criteria.
 - e. **Default**
Indicates if the method is the default method for Advanced Combine Shipment.
3. The Fields that are used for the splitting of the lines in the created invoice are defined by choosing the action **Fields**.
*Remark: it is possible to add the standard required fields to a method by choosing the action **Add standard Required fields**. This action will delete the existing fields from the **Advanced Combine Shipment Method Detail** and will create the standard required fields based on the **Get Header Values From** field. Example given: sales header fields for the Get Header Values From: Order.*

4. After choosing the action **Fields**, the page opens in which the **Advanced Combine Shipment Method Details** can be viewed. These are the fields that are used for splitting the invoice.
 - a. **Table Type**
Specifies the origin of the fields of the advanced combine shipment method.
 - b. **Table Caption**
Displays the Table Caption.
 - c. **Field Id**
Specifies the selected field of the advanced combine shipment method.
 - d. **Field Caption**
Displays the caption of the selected field.
 - e. **Field Class**
Specifies the class of the field of the advanced combine shipment method.

Remark: *The fields in this page cannot be edited by the user. It is however possible to remove the Field Sales Person Code. This field will then no longer be inserted on the invoice as a standard field. This makes sure that the invoices will not be split per sales person code.*

5. The action **Set Defaults** has the same functionality as the action **Add standard Required fields**.
6. Close the **Advanced Combine Shipment Method Details** page, and choose the action **Invoice Texts** to specify the comments that have to be displayed on the combined invoices.

Example given: to add the Your Reference field from the sales order header in the invoice lines, instead of the standard Sales Shipment No. per invoice lines.

Remark, *it is only possible to print invoice texts for Order Line fields if the invoices are grouped on Order Line info. It is thus necessary to include the Source Type Document Line in the Fields of the Advanced Combine Shipment Method.*

- a. **Sequence No**
Specifies the sequence in which comment lines will be inserted.
- b. **Source Type**
Specifies the source type to use for creating the invoice comments. This is the location from which the information will be taken when generating the comment line text.
The options are:
 - i. Table Mapping,
 - ii. Order,
 - iii. Order Line,
 - iv. Shipment, and
 - v. Shipment Line.
- c. **Table Mapping Code**
Specifies the table mapping code to indicate the table relationship that will be used to add the comments to the document. The fields that are available for displaying on the invoice depend on the chosen mapping.
- d. **Field**
Specifies the field from which the information is taken for generating the invoice text

- e. Title**
Specifies the text constant or free text that will be printed before the field value.
 - f. Preview**
Show the resulting value, based on the current setup.
 - g. Add once per Document**
Specifies if the invoice text should be added once or *e.g.* per shipment added to the invoice.
When enabled, this will only generate one comment line per unique value.
7. Once the **Advanced Combine Shipment Method** has been configured, it has to be assigned on the Customer Card.
 8. Navigate to the **Customer Card** of the customer for which combined shipments need to be created.
 9. In the field **Advanced Combine Shipment Method Code** in the **Invoicing Tab**, select the desired method.

9.2 Advanced Combine Shipment Task

1. Choose the search icon, enter **Advanced Combine Shipments**, then choose the related link.
2. Specify the filters that need to be used in order to create the combined invoice and choose **OK**.
 - a. Posting Date**
Specifies the posting date for the invoice(s) that the batch job creates.
This field is required.
 - b. Document Date**
Specifies the document date for the invoice(s) that the batch job creates.
This field is required.
 - c. Calc. Inv. Discount**
Specifies if the invoice discount amount needs to be automatically calculated on the shipment.
 - d. Post Invoices**
Specifies if the invoices need to be posted immediately.
 - e. Only Std. Payment Terms**
Specifies if the shipments with standard payments terms need to be included. If this option is selected, all other shipments need to be manually invoiced.
 - f. Copy Text Lines**
Specifies if the manually written text on the shipment lines need to be copied to the created invoice.

10 Flow to Sales/Purchase Trx on attachments

On the attachments in sales and purchase documents, there is an option **Flow to Sales/Purchase Trx**. This function is used to transfer the attachments to *e.g. a sales quote*, to the sales invoice.

In standard Business Central, this functionality has to be manually set on the document for which the attachments need to flow through the transactions.

Dynavision added setup, in order to specify this setting based on different parameters, to make sure that the correct attachments will be transferred for the correct cases.

10.1 Document Flows

In Document Flows, it is possible to set up the default values for the fields **Flow to Sales Trx** and **Flow to Purchase Trx** fields. This is currently possible for the entities Customer, Vendor and Item.

1. Choose the search icon, enter **Document Flows**, then choose the related link.
2. Add a line for the entity and table filters in order to set up the default values of the fields.
 - a. **Priority**
Specifies the priority that dictates the sequence in which document flows are processed.
 - b. **Source Table Caption**
Specifies the table for which the document flows applies.
 - c. **Source Table Filters**
Specifies the source table filters for when the document flow should be applied.
 - d. **Document Category Filters**
Specifies the document category filters for when the document flow should be applied.
 - e. **Flow to Purchase Trx**
Specifies if attachments that match this document flow will be copied to purchase documents.
 - f. **Flow to Sales Trx**
Specifies if attachments that match this document flow will be copied to purchase documents.
3. After setting this information, the settings will be transferred to the specified entities which comply with the set filters.
4. These settings can always be overruled by the Document Category settings that are assigned to the entity. In order to set these default values, navigate to the **Document Categories page**.

Remark: *the order of the defined Document Flows is important. The system will search for a document flow that applies when the file is being uploaded. Once a Document Flow is found, the system will use these settings and will not move on to the following flow. This means that, if a general flow is added for an entity, and after that a detailed filtered flow, the system will take the settings of the general flow.*

Make sure to first define the most detailed document flow, and lastly the more general Document flow. Example given:

Priority	Source table caption	Source table filters	Document category filters	Flow to Purch. TRX	Flow to Sales TRX
1	Item	Item Category: ROOD	Code: ALLON	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	Item	Item Category: ROOD	-	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Item	-	-	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

10.2 Document Categories

1. Choose the search icon, enter **Document Categories**, then choose the related link.
2. Select the Document Category for which the default settings need to be specified.
3. In the **Document Flow Tab**, specify the default settings for the fields **Flow to Purch. Trx** and **Flow to Sales Trx**.

10.3 Usage

When files are uploaded with Drag and Drop, using a Document Category that has settings for the fields Flow to Sales/Purch. Trx, this setting will be taken over on the **Attached Documents**.

In case no settings are specified on the Document Category, the settings specified on the **Document Flows** will be taken over for the attachments.

When no Document Category is selected for the upload of the files, the settings in the Document Flows will be taken over.

Remark: filling in the Document Category on the Attachments afterwards will only check the Document Category settings of the Document Category that is assigned to the attachment.

10.3.1 Remarks

- **The settings in the Document Flow will only be applied on newly uploaded documents.** Documents that are already attached to the entity will not be updated with new settings that are specified on the Document Flows or the Document Categories. This can be manually updated for these documents.
- **The document category settings have priority over the settings on document flow.**
To only take over the settings of the document flow, the fields Flow to Purch. Trx and Flow to Sales Trx on the document category need to be empty, that way they will not override the document flow setup.

11 Preview PDF attached to certain document types

The PDF can be previewed on following document types when they were attached as PDF using the action **Attach as PDF** on the documents.

- Posted Sales Invoices,
- Posted Sales Credit Memo's,
- Posted Purchase Invoices,
- Posted Purchase Credit Memo's.

11.1 Trade User Setup

The View as PDF in the fact box functionality needs to be activated for the users in the **Trade User Setup**.

1. Choose the search icon, enter **Trade User Setup**, then choose the related link.
2. For the Users for which the PDF's need to be visible in the fact box on the documents mentioned above, the columns **Show PDF (Sales)** and/or **Show PDF (Purchase)** needs to be checked.
3. Once these have been checked, refresh the browser page. On the documents mentioned above, in the fact box, the section **PDF** is visible, showing a PDF if one is added as attachment to the document.

11.2 PDF section in fact box on detail page of documents

On the Documents mentioned above, if the needed checkboxes are checked in the **Trade User Setup**, the **PDF** section will be visible on the Fact box in the **Details** tab on the details page of the selected document.

1. Navigate to *e.g.* the posted Sales Invoices List and select the document for which the PDF needs to be viewed.
2. Expand the Fact box pane if needed and select the **Details** tab.
3. If an attachment is attached to the selected document, *and the attachment is a PDF*, the document will be displayed in this **PDF** section.
4. Choose the action **Previous** or **Next** to display the next PDF file if there are multiple attached to the document (*which can be found by selecting the title of the PDF section in the fact box*).
5. It is possible to open a page with a bigger display of the PDF document that is currently shown in the **PDF** section by choosing the action **View PDF** (*which can be found by selecting the title of the PDF section in the fact box*).

11.3 View PDF on Attached Documents

It is also possible to view the PDF of attachments to documents in Business Central by using the **Attached Documents** page.

1. Navigate to *e.g.* the sales orders list page and select the posted invoice for which the PDF needs to be viewed.
2. If the PDF is not yet attached to the document, firstly choose the action **Attach As PDF**.
3. After the PDF is added as attachment to the document, navigate to the **Attached Documents** page, either by choosing the action **Attachments** or by selecting the number shown in the fact box, **Attachments, Documents**.
4. On the **Attached Documents** page, select the attachment that needs to be previewed and choose the action **View PDF**.
5. A page opens in which the PDF document is shown.

12 Document Sending Profiles – Attachments

Standard Business Central allows to add the PDF version of various types of documents as an attachment to the document itself. This can be done by using the action **Attach as PDF**, available on the supported documents.

The Dynavision Trade module has extended the **Document Sending Profiles** settings page in order to be able to automatically add the PDF of a document as an attachment to the document that is send.

1. Choose the search icon, enter **Document Sending Profiles**, then choose the related link.
2. Create a new Document Sending Profile or choose a profile to edit.
3. In the field **Attach**, select the format of the document that needs to be attached to the document when sending the document. The options are: No, PDF, Electronic Document, and PDF & Electronic Document.
4. Configure the Document Sending Profile on the Customer Card or Vendor Card.

Navigate to the document that needs to be send, and choose the action **Send...**

This action will open the **Send Document to** page, in which certain settings can be edited that will be used for sending the document (*taken over from the Document Sending Profile set on the Vendor or Customer*).

13 Combi items

The combi items feature aims to simplify the process of the assembly of items. This functionality makes it possible to quickly compose and assemble items in Business Central.

13.1 Combi Items Setup

1. Choose the search icon, enter **Combi Items Setup**, then choose the related link.
2. On the page that opens, the treatment information can be specified and the formatting that needs to be applied on the price of the Combi Item.
 - a. **Combi Items Treatment**
 - i. **Item Template Combi Item**

Specifies the template that will be used when creating Combi Items.
 - ii. **No. Series Combi Item**

Displays the No. Series that will be used when creating Combi Items.
 - iii. **Reason Code Combi Item**

Specifies the Reason Code that will be used when creating Combi Items.
 - iv. **Location Combi Item**

Specifies the location that will be used when creating Combi Items. This is the location in which the assembly is executed and in which the stock will be increased when a Combi Item is created.
 - v. **Default Customer**

Specifies the customer that will be used when calculating the price for a created Combi Item.
Best practice is to specify a separate customer, like the POS terminal customer.
 - vi. **Price List Combi Item**

Specifies the Price List that will be used when creating a combi item. The price of these Combi Items will be added to this Price List.
 - b. **Layout**
 - i. **Price Formatting**

Specifies the formatting that is used for the price of the Combi Item.
Example given: <Precision,2> <Sign> <Integer Thousand> <Decimals,3>.
 - ii. **Price Value**

Contains a test price value.
 - iii. **Result**

Contains the result of the Price value using the specified Price Formatting.

13.2 Creation of Combi Items

1. Choose the search icon, enter **Combi Items**, then choose the related link.
*The Combi Items page can also be accessed by choosing the action **Combi Items** on the **Combi Items Setup** page.*
2. An overview of the created Combi Items is visible.
3. Choose the action **New** or **New Combi Item** to create a new Combi Item, or choose an existing Combi Item that needs to be edited.
4. On the **Combi Item: Details** page, fill in the necessary fields to set up the Combi Item.
 - a. **No.**
The Item Number of the Combi Item. This number will be automatically generated using the No. Series specified in the **Item Template Combi Item** field in the **Combi Items Setup** page.
 - b. **Description**
Specifies the description of the Combi Item.
 - c. **Description 2**
Specifies the extended description of the Combi Item.
 - d. **Base Unit of Measure**
Select the Base Unit of Measure for the Combi Item.
 - e. **Assembly – Location**
Specifies the location in which the Combi item will be stocked after assembly. This is automatically filled in when the **Location Combi Item** field is filled in in the **Combi Items Setup** page.
 - f. **Assembly – Quantity**
Specifies the quantity to assemble
 - g. **Assembly – Reusable Packaging from Assembly BOM**
If the Dynavision Reusable Packaging module is installed.
If enabled, the Reusable packaging from the assembly BOM will be included on documents.
 - h. **Assembly – Excise on BOM Components**
If the Dynavision Excise duties module is installed.
Specifies if Excise is applicable on the BOM Components of the Combi item.
 - i. **Customer**
Specifies the customer that will be used when calculating the price for a combi item.
 - j. **Standard Cost**
Displays the standard cost for the item.
 - k. **Price List Combi Item**
Specifies the Price List that will be used when creating a combi item. The price of these Combi Items will be added to this Price List. This field will automatically be filled in with the value specified in the **Price List Combi Item** field on the **Combi Items Setup** page.
 - l. **Unit Price incl. VAT (calculated)**
Displays the calculated Unit Price including VAT.

m. Sales Price Incl VAT

Fill in the desired Sales Price incl. VAT.

This price will be used when adding the price for the Combi Item to the price list.

n. Apply Excise

If the Dynavision Excise duties module is installed.

Specifies if the excise system is enabled for this item.

14 Item template linked to item category

In the **Item Category Card** of an item Category, it is possible to link an Item Template.

1. Choose the search icon, enter **Item Categories**, then choose the related link.
2. Select the Item Category (or add a category) to which a template needs to be assigned. Choose **Edit**.
3. On the **Item Category Card**, in the **Item Template** field, select the item template that will be (possibly) applied for items to which this category is assigned.

When changing the Item Category for an item, and an Item Template is linked to the new Item Category, a pop-up will be shown with the question if the linked template needs to be applied on the item.

15 Pop-up comments on Item/Customer/Vendor template

It is possible to set up pop-up comments on the Item, Customer and Vendor Card.

Remark: *the pop-up comments will be suppressed when the (Advanced) Combine Shipment functionality is used and when an invoice is created using Get Lines.*

*There will however, after using the **Advanced Combine Shipment**, be a list page opened with all popup comments that were encountered when running the functionality.*

In this list page, all popup comments can be seen, those for items and those for customers. The popup comments will be displayed once, grouped per customer and item.

When Dynavision Cloud POS Light is installed, the pop-up comments will also not be shown when the invoice is created.

Finally, when Dynavision Rental Consumption is installed, the pop-up comments will also not be shown when the Event invoice is created.

The pop-up comments will be suppressed in batch, bulk and automated document creations.

15.1 Open the Pop-up Comments page

15.1.1 Open on the Customer Card

1. Navigate to the Customers List and select a customer for which (a) pop-up comment(s) need(s) to be configured.
2. Choose the action **Related > Customer > Pop-Up Comments**.

15.1.2 Open on the Vendor Card

1. Navigate to the Customers List and select a customer for which (a) pop-up comment(s) need(s) to be configured.
2. Choose the action **Related > Vendor > Pop-Up Comments**.

15.1.3 Open on the Item Card

1. Navigate to the Customers List and select a customer for which (a) pop-up comment(s) need(s) to be configured.
2. Choose the action **Related > Item > Pop-Up Comments**.

15.2 Pop-Up Comment Configuration

1. Choose the action **New** to create a new Pop-Up Comment.
2. Fill in the necessary fields.
 - a. **Language Code**
Specifies the language for which the pop-up comment needs to be shown.
This is dependent on the language settings of the environment.
 - b. **All Language Codes**
Specifies whether the Pop-Up should be shown for all language codes.
If a language code has been chosen in the **Language Code** field, it will be overruled by this function.
 - c. **Description**
Specifies the description of the Pop-Up Comment.
 - d. **Starting Date**
Specifies the date from which the Pop-Up will be displayed for the item, customer or vendor.
 - e. **Ending Date**
Specifies the date from which the text will no longer be displayed.
 - f. **Lines**
In the lines, the text can be inserted that needs to be displayed for the Pop-Up Comment.
 - g. **Sales / Purchases / Warehouse Tab**
Specifies on the corresponding documents if the Pop-up comments need to be displayed when the Customer, Vendor or Item is added to the document.
The options are:

- i. **Nothing** (no pop-up is shown),
- ii. **Pop-up** (the pop-up is shown),
- iii. **Print** (the pop-up comment text is printed on the document), and
- iv. **Print & Pop-up** (the pop-up comment text is printed and shown).

16 Minimum order amount on vendor

It is possible to specify a minimum order amount that needs to be taken into account when creating a purchase document.

If the total order amount is less than the specified minimum order amount for the vendor, a message is shown. This setting is not blocking.

1. Navigate to the **Vendor Card** for which the Minimum Order Amount needs to be set up.
2. In the field **Minimum Order Amount** enter the amount.

The value in this field will also be made visible on the Requisition worksheet at the bottom of the page. This will display the value for the current selected line.

In the purchase orders, the minimum amount can be viewed in the **Vendor statistics factbox**.

16.1 Requisition worksheet - Check Vendor Minimum Amount

On the requisition worksheet, an action is added that can be used to show the total amounts per vendor (and/or special/drop shipment order). Those lines not reaching the minimum amount listed for the vendor, will be indicated in red, and shown at the top of the list.

1. Navigate to the **Requisition worksheet** and execute the necessary actions to fill the lines of the worksheet.
2. Choose **Home > Check Minimum Order Amount...**
3. A page will open in which the Vendor Minimum Order Amount is checked over all lines of the Requisition worksheet. This specifies the total amount in the worksheet line for the vendor, and the difference between the minimum amount specified on the Vendor and the total in the worksheet.

17 Optimization of recurring lines

17.1 Recurring Sales lines listpage and card extensions

On the Listpage and Card of the Recurring lines, actions and information is added to make the configuration and management of the recurring lines more efficient.

- **Update:** the recurring lines can be updated quickly, using this functionality. This action is added on the list page, or on the card of the recurring sales lines. How this function works is described in section [Update recurring lines](#).

- **Items limited** column on the Recurring Sales lines list page and card. This field specifies if the sale is limited to items on the recurring sales lines. No other items can be added on sales documents for the customer.
- **Add Items...** action on the card of the recurring sales lines. This action makes it possible to add lines for items to the recurring sales lines list, based on set filters, such as item category code, no., etc. This can include Variants and can be for the specified UOM of the item.

17.2 Update recurring lines

Use the task **Update Standard (x) Lines** (*x is either Sales or Purchase*) for the following functionalities:

1. Update the description of recurring lines in order to use the most recent Description set on the Item Card by enabling the action **Update Description**.
2. Removing lines that contain blocked items by activating the option **Delete Blocked Lines**,
3. Sort the recurring lines by
 - a. Item No.,
 - b. Description,
 - c. Shelf No. + Item No.,
 - d. Shelf No. + Description, or
 - e. Item category Code.

This task can be found by using the search function in Business Central, or by navigating to the page **Recurring Sales Lines**. The action is also available on the **Recurring Sales Lines Card**.

17.3 Extra actions on Recurring Lines

On the **Recurring (x) Lines** page (*x is either Sales or Purchase*) for a Vendor/Customer, a couple of new functionalities are added.

1. Navigate to the Vendor / Customer List and select the Vendor / Customer for which the Recurring lines need to be managed.
2. Navigate to the page by choosing **Related > Sales > Recurring (x) Lines...** (*x is either Sales or Purchase*).
3. Following functionalities are added.
 - a. Column **Skip Zero Quantity**
When enabled, only items where quantity is not zero will be added by the recurring lines. *This can be useful when modifying a weekly order.*
 - i. Firstly, the Recurring Lines need to be set up in the Vendor / Customer Card.
 - ii. Choose the action **Card** and change the quantities of the items.
 - iii. Close the Card. When the Recurring Lines are now fetched, only the items will be included for which a quantity is noted.
 - iv. These rules can be sorted dynamically.
 - b. Column **Delete Quantity on Open**
Resets the quantity of the items to 0 when opening the recurring lines page.
 - c. Column **Items Limited**
Specifies that the purchase / sale is limited to items from the recurring lines, no other items can be added on the sales document for the vendor / customer.
When this option is selected on the Recurring Sales lines that are added to the customer, this will be inherited. This can be edited if needed.

d. Column Add Items

Items inserted on Purchase / sales documents can be added to these recurring lines.

e. Action Standard Lines Rule Set

In some cases it might be required that certain types of lines (G/L Account,...) or a certain item or item type is never asked when adding lines to a document. On the **Standard Lines Exclude Rules** page, it is possible to set up rules for a combination of parameters that will result in an overrule when adding lines. This can be useful if a certain type of line is never relevant to add to the recurring lined.

- i. Using this action, rules can be defined that are used to exclude certain items or item types.

01. Code

Specifies the Code, used to identify the Exclude Rule.

02. Description

Specifies the description of the exclude rule.

03. Entity Type

Specifies the entity type for which the rule is set up.

This can be set up either for

- I the customer,
- II Customer Price Group,
- III Customer Discount Group,
- IV Country/Region, and
- V Post Code

depending on where the action has been performed. (*If it is opened from the customer card, customer will be preselected, if it is opened from the vendor card, vendor will be preselected.*)

04. Entity No.

Specifies the number of the entity. The options that can be selected are based on the Entity Type.

05. Line Type

Specifies the line type for which the rule is set up.

The options are:

- I G/L Account,
- II Item,
- III Resource,
- IV Fixed Asset,
- V Charge (item),
- VI Allocation Account,
- VII Item Category,
- VIII Item Product Posting Group, and
- IX Item Price Group.

06. Line No.

Specifies the number of the selected line type that needs to be excluded.

07. Item Type

This will display the Type of a selected item, in case an item is selected as line type and line no.

08. Overrule Exclude

When checking the column Overrule Exclude, it is still possible to overrule exclude lines and add the item to the Standard Purchase / Sales Lines Card.

This can be useful when e.g. reusable packaging items need to be excluded, apart from one reusable packaging item (e.g. pallet).

09. Overrule Insert Question

When this option is checked, the Insert Question will be overruled when a purchase order or sales order is created for the customer.

Example given:

Code ↑	Description	Entity Type	Entity No.	Line Type	Line No.	Item Type	Overrule Exclude	Overrule Insert Question
NO GL ACCOUNT	Never ask for a G/L Account	Customer		G/L Account			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SKIP EMPTYITEMS	Never ask for an Item with Item Type Empty	Customer		Item		Empty	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SKIP COMBI ITEMS	Never ask for an Item with Item Type Combi	Customer		Item		Combi Item	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SKIP 1 SPECIFIC ITEM	Skip for 1 specific Item	Customer		Item	981000	Normal	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
→ SKIP ALL FOR CUST	Skip all types for a certain customer	Customer	10000				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

When we regard the "SKIP 1 SPECIFIC ITEM" Exclude rule, and set up following line for the customer (the card of the Recurring sales line not containing the to skip item).

Code ↑	Description	Valid From Date	Valid To date	Payment Method Code	Payment Terms Code	Direct Debit Mandate ID	Blocked	Insert Rec. Lines On Quotes	Insert Rec. Lines On Orders	Insert Rec. Lines On Invoices	Insert Rec. Lines On Cr. Memos	Skip Zero Quanti...	Delete Quanti... on Open	Items Limited	Add Items
→ TESTING							<input type="checkbox"/>	Manual	Manual	Manual	Manual	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Create a sales document for the customer, and select the item that is mentioned in the exclude rule. No error will be thrown when the item is inserted in the sales lines, this because of the option **Overrule Exclude**, which is enabled.

When the option is disabled, an error will be given when said item is added to the sales document.

Line No. ↑	Type	Drop Ship...	Purchasing Code	No.	Variant Code	Description
0	Item	<input type="checkbox"/>		981000		*

Item 981000 is not found on a recurring sales line for Sell-to Customer No. 10000, not allowed to sell

17.4 Save Recurring lines based on unposted sales documents

In standard Business Central, recurring lines need to be created and defined in advance. The Dynavision Trade module provides a feature to make it possible to create recurring lines, based on an unposted document.

These lines can be created based on (unposted) sales- or purchase documents and invoices.

1. Navigate to an unposted document from which recurring lines need to be created.
2. Choose the action **Save Recurring (x) lines**, which can be found via **Actions > Functions > Other**.
(x) is either sales or purchase
3. In the page that opens, specify the necessary fields.
 - a. **Vendor No. / Customer No.**
Specifies the Vendor / Customer for which the recurring lines are created. This is default filled in with the Vendor / Customer noted on the header of the document.
 - b. **Vendor Name / Customer Name**
Displays the name of the Vendor / Customer.
 - c. **Standard Purchase Code / Standard Sales Code**
Specifies a code that identifies the standard purchase / sales code. This code needs to be filled in manually.
Remark: *this code needs to be an unique code (that does not yet exist in the system) and will be used to link the vendor or customer.*
 - d. **Standard Purchase Description / Standard Sales Description**
Specifies a description of the standard purchase / sales code.
4. Choose **Next** and edit the lines that need to be saved if necessary.
5. Choose **Finish**. The user gets redirected to the **Recurring Lines** page and the newly defined code is visible.

18 Item Selection – assign attributes

In order to easily add attributes to a selection of items, the action **Attributes (Multiple)** is added to the Item List.

1. Navigate to the Item List.
2. Make a selection of items in the list and choose the action **Attributes (Multiple)**, which can be found under the action **Attributes**.
3. On the page, following information is shown.
 - a. **Attribute**
Specifies the item attribute.
 - b. **Value**
Specifies the value of the item attribute.
The value is colored according to the items in the selection:
 - i. If the value is **green**, the value was found on all items.
 - ii. If the value is **Gray**, the value was found on some items.

c. Unit of Measure

Specifies the name of the item or resource's unit of measure, such as piece or hour.

d. Action

Specifies the action to perform for the item attribute.

4. The values of the Attributes can be edited. It is also possible to remove the attribute from the items in the selection, and to add a new attribute for the items in the selection.

The attributes can also be deleted in bulk for the selection of items.

19 Purchase Proposition

The Purchase Proposition functionality was developed with the goal of creating purchase proposals based on sales numbers that occurred in previous period. This is primarily added for retail customers but can also be used more broadly.

In order to calculate the Purchase Proposition, some setup is required. The Calculation parameters and templates need to be specified.

19.1 Purchase Proposition Calculations

The calculation parameters, like the periods that are used in the calculation for determining purchase proposals, can be set in the Order Proposal Calculations page.

Choose the search icon, enter **Purchase Proposition Calculations**, and then choose the related link.

On this page, an existing period calculation method can be modified or a new one can be added.

19.1.1 General tab

Firstly some general information needs to be specified.

1. Code

Specifies the code for this calculation method.

2. Description

The description for the calculation method.

3. Document date filter

Specifies a date formula to apply on the source documents. This can be used to exclude source documents with dates too far in the future.

- a. If empty, all documents will be included in the calculation.
- b. If a date formula is filled in, source documents received/send/produced from the working date up to and including the set date filter will be included.

19.1.2 Sales Number tab

The calculation of the proposed quantities in the Purchase Proposition is based on three periods. These three periods are calculated based on the current work date in Business Central and two values that need to be set, sales period and lookback period.

1. Sales Period

Using a date formula, specifies the date range of one sales period.

2. Retrospective Period

Using a date formula, specifies the range between the current and previous sales period.

3. Calculation Type

Specifies to calculate the highest or average sales quantity for all periods. E.g. 'Average' can be used to reduce overstocking.

In the image below an example is shown of the three periods with Sales Period 3W, Lookback Period -1J and work date 05/06/2023:

Simulation	
First Receipt Date	<input type="text" value=""/>
Previous Period	15/05/22 <- 04/06/22
Previous Period + 1	05/06/22 -> 25/06/22
Current Period	15/05/23 <- 04/06/23
Latest Valid Date	3/04/2023

1. Previous period

What is sold, looking back into the past using the specified lookback period.

This involves going back, counting from the lookback work date, and looking at the values before this date in the set sales period (N-1).

2. Previous period + 1

What is sold, looking back into the past using the specified lookback period. This involves going back in the past, counting from the lookback work date, and looking at the sales numbers in the set sales period after this date. ((N-1)+1)

3. Current period

What is sold in the set sales period before the current work date, excluding the work date itself. (N)

The **Last Valid Date displayed** in the simulation specifies the latest date on which items are included in the calculation of the proposed quantity. New items purchased after this date are excluded from the calculation.

This defaults to three times the specified sales period.

When calculating proposals, the first receipt date of an item is considered. This is the date a new item was first received in Business Central.

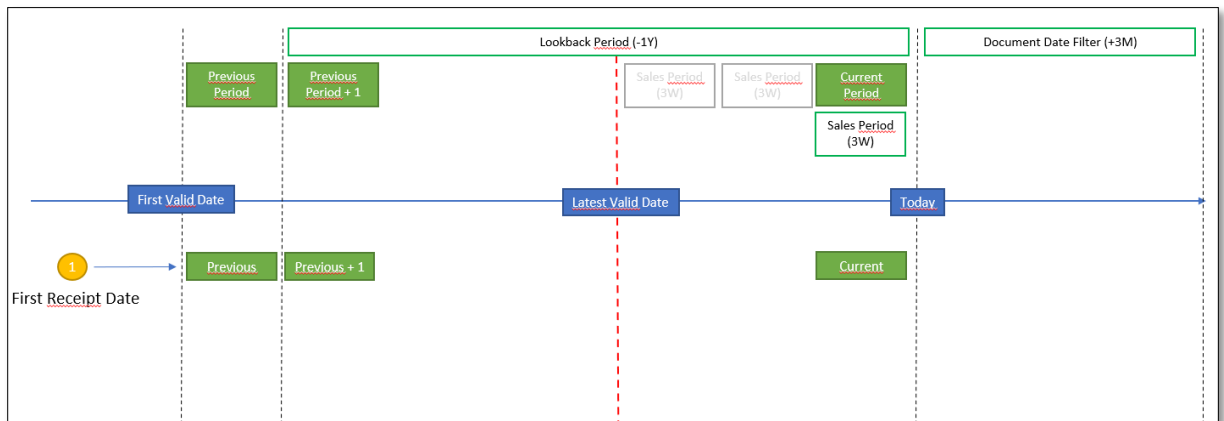
While calculating the proposed quantities there are four possible scenarios:

Using following dates, these scenarios will be simulated in Business Central (work date 08/06/2023) and calculation method highest.

Simulation	
First Receipt Date	<input type="text"/>
Previous Period	18/05/22 <- 07/06/22
Previous Period + 1	08/06/22 -> 28/06/22
Current Period	18/05/23 <- 07/06/23
Latest Valid Date	6/04/2023

1. An item that has been purchased and received before the Lookback Period.

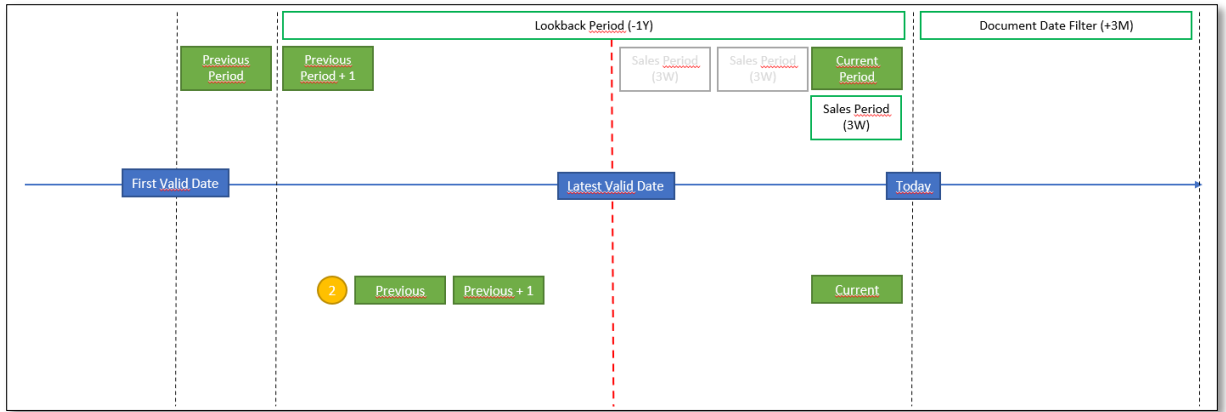
In this case, There is is present for the previous period (N-1) and the previous period + 1 ((N-1)+1). These numbers are included in the order proposal.



Example given: the first receipt date of the item is 10/04/2022 (10 pieces). On 20/05/2022, 2 sales orders are created (for 6 pieces of the item total) and shipped. Because the number of sales is 6 in the previous period and current stock is 4, the proposed quantity to purchase is 2 (6 - 4 = 2).

2. An item purchased and received after the Lookback Period.

In this case, the calculation will be done based on the first receipt date of the item. From that date, the sales data will be used in the calculation. In the purchase proposition page a notification and indication is given in the form of an orange sphere that the calculation has used data in a different period: "First receipt date is more recent than the default periods".



Example given: the first receipt date of the item is 30/06/2022 (20 pieces). On 01/07/2022 10 items are sold and on 22/07/2022 2 items are sold.

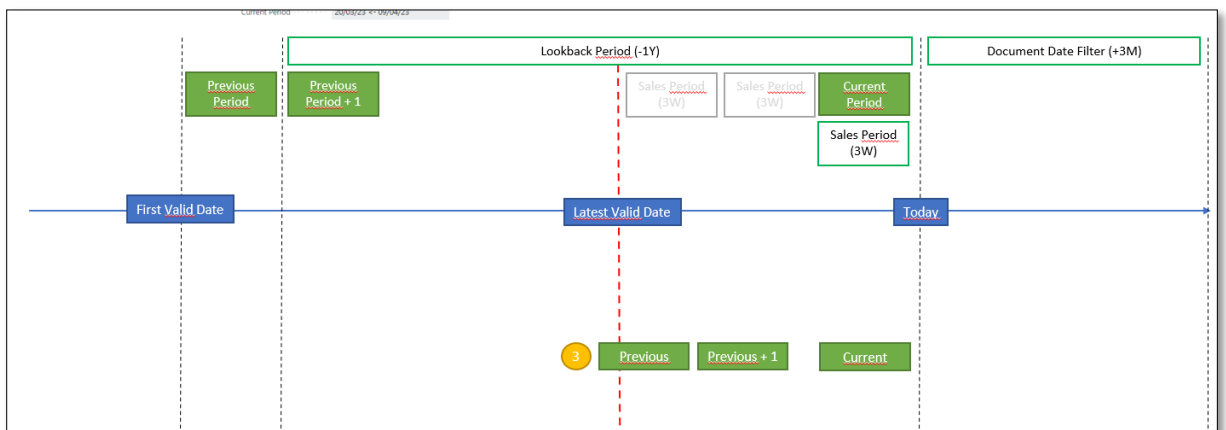
Simulation	
First Receipt Date	30/06/2022
Previous Period	30/06/22 <- 20/07/22
Previous Period + 1	21/07/22 -> 10/08/22
Current Period	18/05/23 <- 07/06/23
Latest Valid Date	6/04/2023

As can be seen in the simulation, the previous period + 1 has shifted from "08/06/2022 -> 28/06/2022" to "21/07/2022 -> 10/08/2022". The proposed quantity in the purchase proposition for the item is 2. Since 10 was the highest number that has been sold in one of the periods and there are still 8 in stock ($10 - 8 = 2$).

3. An item purchased and received just before the calculated "Latest Valid Date".


In this scenario the calculation will take into account sales data in the periods starting from the first moment of receipt.

In the purchase proposition page a notification and indication is given in the form of an orange sphere that the calculation has used data in a different period: "First receipt date is more recent than the standard periods".



Example given: the first receipt date of the item is 05/04/2023 (20 pieces). This first receipt date is just before the Latest Valid Date 06/04/2023.

To calculate the proposed quantity for this item, the following periods will be used:

Simulation	
First Receipt Date	5/04/2023 
Previous Period	05/04/23 < - 25/04/23
Previous Period + 1	26/04/23 -> 16/05/23
Current Period	18/05/23 < - 07/06/23
Latest Valid Date	6/04/2023

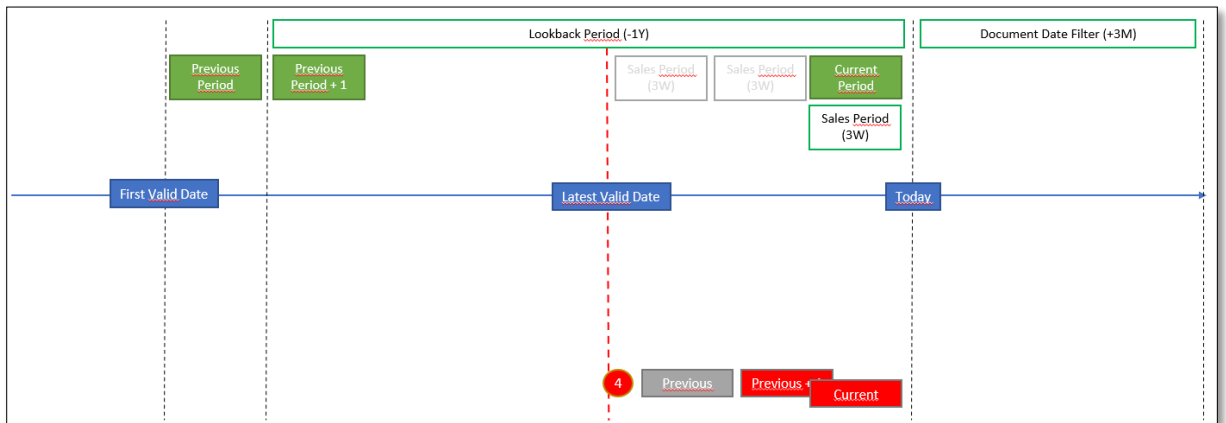
We sell 9 pieces of this item on 14/04/2023, and we have an unsent sales order of two pieces on 27/04/2023 and a sales order of one piece on 28/04.

Because the highest number of sales is 9 (in the current period), the current stock is 10, of which 2 are reserved, so the available stock is 8, the proposed quantity is 1 ($9 - 8 = 2$).

In the purchase proposition page a notification and indication is given in the form of an orange sphere that the calculation has used data in a different period: "First receipt date is more recent than the standard periods".


4. An item that is received after the calculated "Latest Valid Date".

These items will not be included in the calculation of the proposed quantity in the purchase proposition.



Example given: the first receipt date of an item is 07/04/2023 (10 pieces).

In the simulation, we already see that an error is given because the first receipt date is too late to include in the simulation:

Simulation	
First Receipt Date	7/04/2023 
Previous Period	Validation Results
Previous Period + 1	First receipt date should not be later than 06/04/23
Current Period	18/05/23 <- 07/06/23
Latest Valid Date	6/04/2023

The purchase proposition will not include a proposed quantity for the item. If all lines are displayed in the Purchase proposition page, the item line can be found with a notification and indication in the form of a red sphere "First receipt date is outside the periods".

19.1.3 Demand tab

Several documents that create demand can be taken into account when calculating the quantities in the purchase proposition. The options are:

- 1. Sales Orders**
Specifies if sales orders are included in the calculation results.
- 2. Purchase Return Orders**
Specifies if purchase return orders are included in the calculation results.
- 3. Outbound Transfers**
Specifies if outbound transfers are included in the calculation results.
- 4. Service Orders**
Specifies if service orders are included in the calculation results.
- 5. Job Orders**
Specifies if job orders are included in the calculation results.
- 6. Production Order Components**
Specifies if production order components are included in the calculation results.

19.1.4 Supply tab

Various documents that provide inventory can be taken into account when calculating the quantities in the purchase proposition. The options are:

1. **Purchase Orders**
Specifies if purchase orders are included in the calculation results.
2. **Sales Return Orders**
Specifies if sales return orders are included in the calculation results.
3. **Inbound Transfers**
Specifies if inbound transfers are included in the calculation results.
4. **Transfers in Transit**
Specifies if transfers in transit are included in the calculation results.
5. **Assembly Orders**
Specifies if assembly orders are included in the calculation results.
6. **Production Order Planned**
Specifies if planned production orders are included in the calculation results.
7. **Production Order Scheduled**
Specifies if scheduled production orders are included in the calculation results.

19.2 Order Proposal Templates

In order to calculate the proposed quantities in the purchase proposition page, filters are used. These can be set through the Purchase Proposition Templates page.

Choose the search icon, enter **Purchase proposition Templates**, and then choose the related link.

On this page, an existing template can be modified or a new one can be added.

19.2.1 General tab

Firstly some general information needs to be specified.

1. **Code**
A code should be specified to identify the template.
2. **Description**
Specifies the description of the template.
3. **Calculation Code**
The calculation model used to calculate the order proposal quantities.
4. **Remove existing Lines**
Specifies if all existing lines will be removed first before recalculating the purchase proposition.
5. **Show All Lines**
Specifies if items without quantities will be shown in the calculation results.

19.2.2 Filters tab

1. Vendor No.

Specifies the number of the vendor to filter the items to retrieve. This takes into account the supplier number specified in the field "Supplier No." on the article card.

2. Location filter

Specifies the location(s) you want to calculate the purchase proposition for.

3. Item filters

Specifies the filters for the items to retrieve.

4. Item Attribute Filters

Specifies the item attribute filters for the items to retrieve. A stored filter can be used, created via the item list, "Filter by attributes" or via "Item advanced filters".

It is also possible to enter ad hoc filters to be used in the calculation without saving them as a set of item attribute filters.

5. Include Item Vendors

Specifies if only the default vendor of the item will be considered or all possible item vendors.

6. Show Filter Request

Specifies if the Filters page appears when you choose Calculate in the Purchase Proposition. This screen allows the user to add/change or remove filters for calculating the proposal.

19.2.3 Requisition Worksheet tab

In this tab you can set how the calculated lines in the order proposal should be pushed to the purchase proposal.

1. Worksheet Template Name

Specifies the template name of the requisition worksheet.

2. Journal Batch Name

Specifies the journal batch name of the requisition worksheet.

19.3 Calculating Purchase proposition

1. Choose the search icon, enter **Purchase Proposition**, and then choose the related link.
2. Insert the **Template Code** and **Calculation Code** that need to be used to calculate the proposed lines.
3. Run the calculation using "**Home**" > "**Calculate**".
4. The order proposal will be populated with the calculated quantities for the items for which data is available in the specified periods and which meet the criteria in the filters.

Several columns are visible on the page, through personalization they can be customized. These also depend on the activated demand and supply in the specified calculation method. Proposed quantities can be changed.

5. To push these proposal lines to the requisition Worksheet, use action **Transfer to Requisition Worksheet**.

After transferring the lines from the order proposal to the purchase proposal, they will be removed from the order proposal. *As long as the proposals have not been pushed into the purchase proposal, when the order proposal is recalculated, the line(s) will also be reinstated as a proposal.*

The calculation of the purchase proposition can also be started using the task **Purchase Proposition Calculation**.

1. Choose the search icon, enter **Purchase Proposition Calculation**, and then choose the related link.
2. Run the calculation using the action **Order Proposal Calculation**
3. View the result in the **purchase proposition** page.

It is also possible to schedule the calculation. After executing the task from the job queue, the result of the calculation will be visible in the **Purchase Proposition** page.

19.4 Purchase Proposition History

When a new Business Central environment is set up, there is no historical data from which the Purchase Proposition can get the information for the calculations.

In order to add this data to the environment from another system, the page **Purchase Proposition History** is created, in which this information can be imported through rapidstart, or can be added manually.

1. Navigate to the **Purchase Proposition** page.
2. Choose the action **History**, which can be found under related.
3. On the page that opens, lines will be displayed for the historical data that has already been imported.
4. Choose the action **New**, to add a new line with data to use in the calculations.
5. Specify the necessary information.

- a. **Posting Date**

Specifies the posting date for the historical entry.

b. Entry Type

Specifies the type of transaction that occurred.

The options are:

- i. Purchase,
- ii. Sale,
- iii. Positive Adjmt.
- iv. Negative Adjmt.
- v. Transfer,
- vi. Consumption,
- vii. Output,
- viii. Assembly Consumption, and
- ix. Assembly output.

c. Document Type

Specifies the type of document from which the historical data originates.

d. Item No.

Specifies the item No. that was involved in the historical entry.

e. Variant Code

Specifies the Variant Code of the selected item if variants are set up.

f. Location Code

Specifies the code for the location that the line is linked to. This is the location on which the items are received or from which the items are sold.

g. Quantity

Specifies the number of units of the item in the line that was involved in the historical transaction. If the historical transaction is a sale, the quantity needs to be specified in a negative amount.

h. Unit of measure code

Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.

After adding all historical data, either manually or through a configuration package, when choosing the action **Calculate**, the system will check if there are historical lines for the set periods in the calculation, and if yes, this information will be taken into account when calculating the proposition.

***Tip:** use sales shipment and purchase receipts, in order for the quantities to be taken into account in the Sales Quantity columns when executing the calculations.*

***Tip:** when using Configuration packages, the table that needs to be filled is called **Purchase Proposition History**.*

20 Physical Inventory Orders – serial numbers and lot numbers

In order to make it possible to include the serial numbers and lot numbers in the physical inventory order for the registration of the actual physical inventory vs. the calculated inventory in Business Central.

This information will be calculated along with the theoretical quantities for items in Business Central and can be included in the printout of the inventory registration.

1. Choose the search icon, enter **Physical Inventory Orders**, then choose the related link.
2. Choose **New** to add a new Physical Inventory Order.
3. Fill in the information in the header and select the location for which the theoretical inventory needs to be calculated.
4. Choose the action **Calculate Lines..**, which can be found by choosing **Prepare**, and **Calculate**.
5. On the report page that opens, choose option **Calculate Qty. Expected** and choose **OK**.
6. The lines will be created in the order, with the expected quantity in the base unit of measure of the item.
 - a. In case Serial numbers or lot numbers are used for items, these serial numbers and lot numbers will be available on the document in the column **Qty. Exp. Item Tracking (Base)**. Select the value in the column to open the **Exp. Phys. Invt. Tracking** page to see the serial and lot number information for the item.
 - b. **Use Item Tracking**
Specifies that the counting of the item is done by counting its serial and lot numbers.
7. Once the item quantities are calculated, choose the action **Make New Recording...**, in order to create a physical inventory recording document for the lines on the order. On the request page that appears, it is possible to select to only create recording lines for items that are not already on other recordings for the order.
8. On the Report page, select the desired options and filters to create the desired recording lines.
 - a. **Create Lines per Lot No. / Serial No.**
Specifies that a new physical inventory recording line will be created for each expected lot number / serial number.
9. When the option **Create Lines per Lot No. / Serial No.** was set to active, the items with these serial numbers and lot numbers will be added as separate lines to the Recording. When choosing **Print**, these item serial numbers will be printed on separate lines, making it possible indicate the counted serial number and lot number items.

21 Second unit of measure – Inventory Order

On the **Physical Inventory Order**, it is now possible to specify a second unit when Creating a New Recording.

1. Choose the search icon, enter **Physical Inventory Order**, then choose the related link.
2. Choose the action **Calculate Lines** which can be found when choosing **Prepare** in the actions bar.
3. The lines will be calculated, indicating the inventory that is calculated by the system.
4. Choose the action **Make New Recording...**
5. In the page that opens, it is possible to select the **2nd unit of measure option** in the **Options Tab**. Following options are available.
 - a. Base Unit of Measure,
 - b. Sales Unit of Measure, and
 - c. Purch. Unit of Measure.
6. Choose **OK** to create the recording. The recording will have extra columns for the chosen 2nd Unit of Measure, and columns with the Base Unit of measure. This makes it possible to specify the counted inventory in the desired Unit of Measure.

22 Second unit of measure – Inventory Journal

On the **Physical Inventory Journal** page, it is now possible to specify a second unit when calculating the inventory.

1. Choose the search icon, enter **Physical Inventory Journals**, then choose the related link.
2. Choose the action **Calculate Inventory...** which can be found when choosing **Prepare** in the actions bar.
3. In the page that opens, it is possible to select the **2nd unit of measure option** in the **Options Tab**. Following options are available.
 - a. Base Unit of Measure,
 - b. Sales Unit of Measure, and
 - c. Purch. Unit of Measure.
4. Choose **OK** to run the report and get an overview of the virtual stock in Business Central. Standard, the stock is shown per Base Unit of Measure, but in certain businesses the stock is counted based on another unit of Measure.
Example given: counting the number of containers of bottles instead of the individual bottles.

23 Extended description for tariff numbers

The Trade module has extended the description length for tariff numbers, this makes it possible to supply more information for the tariff numbers.

24 Configuration Templates to create documents

The Dynavision Trade module makes it possible to define a template for documents. This template can be applied on a document in order to fill in certain fields with a certain Default value or Date formula.

24.1 Configuration Templates

1. Choose the search icon, enter **Configuration Templates**, then choose the related link.
2. Choose the action **New** to create a new Configuration Template.
3. Fill in the necessary information to complete the Configuration Template.
 - a. **Code**
The Code used to identify the data template.
 - b. **Description**
Specifies the description of the data Template.
 - c. **Table ID / Name**
Specifies the ID of the table on which the template is based. The fields in the template that can be defined in the lines depend on this selection. *Example given 36 – Sales Header.*
Remark: *the credit memo, return order and invoice also use the sales header, so make sure to choose the correct Table ID.*
 - d. **Enabled**
Specifies if the template is ready for use. When this template is enabled, it can be applied on the relevant document.
 - e. **Enable on New Purchase or Sales Document**
Specifies if the data template can be used/applied in the **New Document** actions.
 - f. **Lines**
 - i. **Type**
Specifies the type of data in the template.
The options are:
 - a. Field,
 - b. Template, and
 - c. Related Template.
 - ii. **Field Name / Caption**
Select the field that needs to be filled in on the document with a certain default value or based on a Date Formula.

iii. Template Code

In case **Type Template** has been selected, select the template code that needs to be applied.

iv. Default Value

Specifies the default value that will be inserted in the chosen field on the line.

v. Date Formula

Specifies the date formula that will be applied on the field specified on the line.

vi. Skip Relation Check

Specifies that the relationship between the table fields should not be checked.

This can be useful when a value needs to be specified for a field that is not yet available.

Example given, to specify a value for a payment term that is not available in the table on which the configuration is based. That value can be specified value, select the Skip Relation Check box, and then continue to apply data without error.

vii. Mandatory

Specifies whether it is required that there is data in the selected field. By default, the checkbox is selected to make a value mandatory.

viii. Reference

Specifies a URL address. Use this field to provide a URL address to a location that specifies additional information about the field in the data template.

Example given, provide the address that specifies information on setup considerations that the solution implementer should consider.

24.2 Usage example Sales Document

The set up templates can be used to create documents, such as sales documents and purchase documents.

In this section, an example is given for creating a sales document using a template. The principle is the same for the purchase documents.

1. Choose the search icon, enter **Create Sales Document from Template**, then choose the related link.
2. On the next page that is shown, fill in the necessary fields in order to create the document.
 - a. **Document Type**
Specifies the type of the sales document that needs to be created.
The options are:
 - i. Quote,
 - ii. Order,
 - iii. Invoice,
 - iv. Credit Memo,
 - v. Blanket Order, and
 - vi. Return Order.
 - b. **Sell-to Customer No.**
Specifies the Sell-to customer number that will be added to the document header of the new document. *(This is optional, if not specified, the field will be empty on the newly created document.)*
 - c. **Sell-to Customer Name**
Displays the name of the selected Sell-to Customer Number.
 - d. **Template Code**
Specifies the code of the template that needs to be applied on the new document that will be created.
*Remark: the Templates that can be selected are filtered on the field **Enable on New Purchase or Sales Document** on the **Config. Template Header**.*
3. After specifying the necessary fields, choose **OK**. The document will be created using the template that was selected.

*Remark: the functionality to create a new document using a template can also be executed starting from the Customer List and Card and Vendor List and Card. This action can be found on the pages mentioned above by choosing the action **New Document** in the actions bar, and choosing the action **Sales Document from Template** or **Purchase Document from Template**.*

On Sales and Purchase documents, the functionality is also provided to apply a template to the existing document.

1. Navigate to the Sales or Purchase document and choose the action **Apply Template**.
2. Select the template if multiple templates are available in the environment. If only one template is available in the environment, this template will be applied.

25 Automatic assignment of lot numbers

On the Location Card, a field is added to indicate if lot numbers will be automatically assigned or not.

Navigate to the location for which the auto assign needs to be activated. In the **General Tab**, enable the field **Auto Assign Lot Numbers**.

When this option is activated, the lot numbers can be assigned on sales documents, transfer orders, assembly orders and warehouse shipments.

The auto assign of lot numbers is only possible for items on which Item Tracking is active, and that have **Lot Specific Tracking** set to yes in the assigned **Item Tracking Code**.

The auto assignment of the Lot numbers for items on the documents mentioned above can be done in two ways.

1. Select the line of the items to which the Lot numbers need to be assigned. Choose the action **Assign Lot Numbers** which can be found by selecting **Line** in the Lines action bar. The Lot number will be assigned if the item has lot number tracking active.
2. Choose the action **Assign Lot Numbers** in the header of the document. This will assign the Lot numbers to all items in the document for which Lot number tracking is activated.

Remark: when assigning on warehouse shipments, when a pick is required, no assignment will be done because this needs to be assigned on the pick.

25.1 Additional remarks

- When working with reservations on items on the documents, the lot numbers cannot be assigned automatically. When reservations are used, the lot numbers will have to be assigned manually or the reservations have to be removed first.
- The allocation will take the cost method (*FIFO, LIFO, ...*) of the item into account if necessary multiple lot numbers will be allocated.
- Blocked Lot numbers will not be assigned to a line.
- Note that the automatic assignment does not take into account existing allocations on picking lines for the calculations of the availability. Therefore, the assigned numbers in question may no longer be available at the time of posting.
- On the documents, a column **Tracked Qty. To Handle (Base)** has been added the lines. Clicking on this flow field opens the **Item Tracking Lines** page.

26 Additional checks on price list rules

In order to make sure that Price lists are set up correctly and no information is disregarded when setting up the price lists, a check has been implemented.

This check can be activated on the **Sales & Receivables Setup** page.

1. Choose the search icon, enter **Sales & Receivables Setup**, then choose the related link.
2. In the **Prices Tab**, enable the field **Verify Product No. & 0 Prices**.
 - a. This option specifies whether a check needs to be executed on empty product no. and 0-prices on the price list lines when the price list is verified.
3. When Verifying the Price list, or switching the Status to Active, the check will be informed, and in case errors occur, the user will receive a message.

27 Planning Flexibility

The Trade module adds functionality to specify the Planning Flexibility field per document type (Requisition, Purchase, Assembly orders and Transfer).

This option can be found on the **Manufacturing Setup** page.

1. Choose the search icon, enter **Manufacturing Setup**, then choose the related link.
2. In the **Planning Flexibility Tab**, specify the setting for each document type.
 - a. **Requisition – Planning Flexibility**
Specifies the default value for the Planning Flexibility field on Requisition Lines.
The options are:
 - i. None (there will always be a new order created),
 - ii. Unlimited (standard BC; allows to always change existing orders), and
 - iii. From Replenishment System.
 - b. **Purchase – Planning Flexibility**
Specifies the default value for the Planning Flexibility on Purchase Documents.
The options are:
 - i. None,
 - ii. Unlimited (standard BC).
 - c. **Assembly Orders – Planning Flexibility**
Specifies the default value for the Planning Flexibility on Assembly orders.
The options are:
 - i. None,
 - ii. Unlimited (standard BC).
 - d. **Transfer – Planning Flexibility**
Specifies the default value for the Planning Flexibility on Transfer Orders.
The options are:
 - i. None,
 - ii. Unlimited (standard BC).

27.1 Remarks

- The field Planning Flexibility is not by default visible on the documents mentioned above. This can be added using Personalization.
- The Planning Flexibility has an important influence on the purchase- and requisition worksheet. *Example given: when a date on a purchase order is changed to a later date, this can result in the creation of a new order, because the need lies before the new date. The risk is that it is possible that the items are purchased/assembled/transferred twice.*

28 Accept Action on Requisition/Planning worksheet

In the Planning and Requisition worksheet, if proposed lines need to be executed (e.g. creation of an order for an item), in standard Business Central, it is necessary to check the **Accept Action Message** for each line individually on the worksheet.

In the Trade module, on the **Requisition and Planning Worksheet**, extra functionality has been added to make it possible to select multiple lines and check the **Accept Action Message** column for the selected lines in bulk.

1. Navigate to the **Planning or Requisition Worksheet** and populate the worksheet (if this is not populated).
2. Select the lines of the propositions that need to be executed and choose the action **Set Accept Action Message**.
3. This action will check the **Accept Action Message** column for the selected lines.
4. In case some lines need to be unchecked, select these lines and choose the action **Clear Accept Action Message**. This action will uncheck the **Accept Action Message** column for these lines.

29 Default location on Requisition worksheet

It is possible to specify a default location that will be used to filter the proposition generation on the location when the worksheet is manually populated.

1. Choose the search icon, enter **Requisition Worksheet Templates**, then choose the related link
2. Choose the action **Requisition Worksheet Names** and choose the action **Requisition Worksheet Names**.
3. In the column **Default Location Code**, the default location can be specified for the Requisition worksheet name.

Remark: This setting does not affect the operation of the scheduled report to populate the Requisition Worksheet.

30 Transfer-from Code on location

On the Location Card, an extra field is added **Transfer-from Code**. This field specifies the code of the location from which items are transferred from to this location.

This can be used when manually creating lines with type Transfer, using the requisition or planning worksheet. The transfer-from Code will then be automatically filled in with the set Transfer-from Code on the Location Card.

31 Transfer route – default direct transfer

On the **Transfer Routes**, when defining the Transfer Routes between different locations, it is possible to indicate if the transfer order between these locations should be handled as a direct transfer.

Navigate to the page **Transfer Routes**, and in the transfer routes matrix, the different locations are shown from which can be transferred.

Select for the location from which to transfer, the value in the column of the location to which the transfer route needs to be configured.

Specify the **In-Transit Code** and the shipping agent information if applicable. In the field **Direct Transfer**, select either yes or no to indicate the use of a direct transfer for the route.

32 "Completely received" and "Create back order" on purchase/sales order

On the Purchase order and Sales order, extra functionalities are added that make it possible to process partially received or shipped orders.

Navigate to an order. Following actions are available on the order.

1. Choose the action **Completely Shipped/Completely Received** to mark the order as completely shipped or received by updating the original quantity with the quantity shipped or received on all lines. This will result in a completely shipped or received order.
2. Choose the action **Create back order** to move all, or a selection of non-shipped/non-received lines to a new order. This will mark the initial order as completely shipped/received, and the remaining items can still be send or received on a later date.
 - a. When choosing the action, there are two options. The option **All lines** will take all lines of the document into account. When there is outstanding quantity to ship or receive, the lines will be transferred to a new order.
The option **Selected Lines** will only take the lines that are selected on the document into account.

33 "Auto explode BOM" on Sales lines

On the Item Card, an option has been added to automatically explode the BOM of the item on sales documents. Additionally the BOM dimensions can also be included in the auto-explode functionality.

Navigate to the Item Card of an item with a BOM. In the **Replenishment Tab**, in field **Auto-Explode BOM**, select disabled or Sales Lines.

In the field **Auto-Explode BOM Dimensions**, select Ask, Copy from BOM or Retrieve Dimensions from Components.

On the orders, in the **Lines**, the action **Explode BOM** can still be executed in case all components of an item need to be noted on the document.

When this functionality is used, the original item will be replaced on the documents by a comment line, and the components will be added on different lines on the order.

34 Additional user settings

The Trade module supplies extra settings that can be configured for users, related to sales and purchase document lines.

The **Trade User Setup** can be accessed in two ways.

Option 1:

1. Choose the search icon, enter **User Setup**, then choose the related link.
2. On the page that opens, choose the action **Trade User Setup** to open the relevant page.

Option 2:

1. Choose the search icon, enter **Trade User Setup**, then choose the related link.

34.1 Trade User Setup

1. On the page **Trade User Setup**, an overview can be seen with the users for which additional settings are defined.
 - a. **User Name**
Specify the user name for which the settings need to be defined, or choose **(All Users)** in case the settings need to be applied to all users.
 - b. **Default Line Type (sales)**
Set up a default line type for new sales lines. When empty, the settings from the Sales & Receivables Setup will be applied instead.
 - c. **Default Quantity on 1 (Sales)**
Specifies if the quantity will be set to 1 for new sales lines. *When empty, the settings from the Sales & Receivables Setup will be applied instead.*
 - d. **Default Line Type (purchase)**
Set up a default line type for new purchase lines. *When empty, the settings from the Purchase & Payables Setup will be applied instead.*

35 Removing obsolete and redundant items

In Business Central, items can only be deleted when there is no available stock left in the system, and when there are no related posts in the open fiscal year.

In Business Central, the deletion of these items need to be done manually and per item. In order to optimize this process, in the Trade module, extra functionality has been added.

1. Choose the search icon, enter **Items to Delete**, then choose the related link.
2. On the Page that opens, an overview is shown of items that can be deleted. If no items are visible, the items will first need to be fetched by using the action **Get Items**.
3. Choose the action **Get Items**, to fetch the items that can be deleted, based on specified options and filters.
 - a. **Posting Date Until**
Specifies the latest posting date that the items that are fetched should have.
 - b. Specify the **filters** that need to be applied when fetching the items to delete if necessary, *e.g. Item Type*
Select the Item Type(s) to filter the items that need to be fetched.
The available options depend on the installed Dynavision applications.
4. After specifying the options and filters, choose **OK** to fetch the items to delete.
 - a. It is possible to "visually delete" items that are listed on the page, using the default **Delete** action on the page. *This will just remove the items from the list, and will not delete the items in the system.*
5. Select the items that need to be deleted from the list by checking the checkbox in the column **Delete**. It is possible to select multiple items and choose the action **Toggle Delete** to check or uncheck the **Delete** column for all items in the selection.
6. When the items that need to be deleted are indicated by a checked **Delete** column, choose the action **Process Items** to delete these selected items.
 - a. It is possible to delete the item(s) immediately or to schedule the deletion via the Job Queue.
7. If certain items could not be removed, the reason will be displayed in the column **Error Reason** for the item line that could not be removed.

36 Correct negative inventory

When working in an environment, in which negative inventory is allowed for items, these negative quantity Item Ledger Entries will remain open with a negative remaining quantity. In order to correct these negative inventories, a request page has been added, that will add lines to the item journal, to correct these item ledger entries.

1. Navigate to the **Item Journal**. Select the batch in which the correction needs to be executed.
2. Choose **Home** and choose the action **Correct Negative Inventory...**
3. On the report page that opens, fill in the needed information for generating the item journal lines.
 - a. **Posting date**
Specifies the date that will be filled in as posting date for the transaction. By default, the current working date will be filled in.
 - b. **Document No.**
Specifies a manual document no that will be noted in the Document No. field for the lines.
 - c. **Filter Item/Location**
Add optional filters to fetch only certain items.
4. Choose **OK** to fetch the lines. These will be added in the Item Journal. These can now be further processed in order to close the negative item ledger entries.

37 Dynamic fields

To make it possible to add Dynamic Fields to a page without having to involve a developer, the **Dynamic Fields** page is added to Business Central.

In this page, it is possible to define different types of calculated fields that have to be available on the list pages and the cards of certain pages.

1. Choose the search icon, enter **Dynamic Fields**, and then choose the related link.
2. On the page that opens, the defined Dynamic Fields can be viewed and edited and new fields can be added.
3. Choose the action **New** to create a new Dynamic Field, or choose a field to edit and choose the action **Edit**.
4. Fill in the necessary fields in order to set up the Dynamic Field.
 - a. **Field Name**

Specify the Name of the Field. This is the name that will be displayed on the pages where the Dynamic Field is shown.

Choose the action **Translations** to view or edit the field name in different languages in order to show the correctly translated field name on the pages in Business Central.
 - b. **Source Table**

Specifies the table for which the field is created.

This table specifies the location of where the Dynamic Field will be shown (on the card and/or list page).

Currently following source tables are available:
 - i. 18 – **Customer**,
 - ii. 23 – **Vendor**, and
 - iii. 27 – **Item**.
- c. **Target Table**

Specifies the table that is used to calculate the value of the Dynamic Field. *This is the table that contains the information that is retrieved to use in the calculations.*
- d. **Calculation Method**

Specifies the method that is used to calculate the result of the Dynamic Field.

The options are:

 - i. Sum,
 - ii. First,
 - iii. Last,
 - iv. Average,
 - v. Median, and
 - vi. Count.

e. Invert Calculation Result

Specifies if the result of the calculation method has to be inverted. This option can be applied on calculation methods that result in a numeric value.

In following cases the Invert option can be enabled:

- i. Sum,
- ii. First, *only if numeric result*,
- iii. Last, *only if numeric result*,
- iv. Avg,
- v. Median.

f. Target Value Field

Specifies the field that is used in the calculation of the Dynamic Field. This is a field that can be selected from the chosen **Target Table**.

g. Target Table Filters

Specifies the link between the target table and source table and/or apply additional filters on the target table.

This allows the user to specify extra filters to compare the selected target table with the selected source table based on certain values.

Remark: the filter values need to be specified in the English notation, e.g. -1Y.

h. Target Company Name

Optionally specifies from which company the records in the target table are retrieved. The Companies have to be defined within a single environment.

i. Show on List Page

Specifies if the field is shown on the list page of the selected **Source Table**.

Remark: a maximum of 10 Dynamic Fields can be actively displayed on the list page (for performance reasons).

j. Enabled

Specifies if the Dynamic Field is enabled. If not, the Dynamic Field will not be calculated and shown on the pages.

On the Card pages of the Target tables, an additional factbox **Dynamic Fields** has been added, which lists the Dynamic Fields that are active for the Target table with their calculated value.

General remarks

It is important to note that the functionality on the list page can be very slow in performance if many dynamic fields are set up. To ensure the performance, the number of dynamic fields on the list page is limited to **a maximum of 10 fields**.

One query is sent per value, this is not bundled which causes a lot of delay in retrieving the result set and calculating the values.

The Dynamic fields factbox is available on the SKU list page and SKU Card, the Item list page and Item Card, the Customer list page and Customer Card, and the Vendor list page and Vendor Card.

37.1 Export and import of Dynamic fields

It is possible to import and export Dynamic fields in XML format. This is possible by choosing the actions implemented on the **Dynamic Fields** page.

1. Choose the search icon, enter **Dynamic Fields**, and then choose the related link.
2. On the page that opens, the defined Dynamic Fields can be viewed and edited and new fields can be added.
3. Choose the action **Import** and select the XML file of the Dynamic field that needs to be imported.
 - a. There will be checks performed when importing the file. The translations will be skipped.
4. Choose the action **Export** to export the selected Dynamic field in XML format.
 - a. The translations will be skipped.

***Remark:** the export and import of translations for the Dynamic fields is currently not supported.*

38 Reusable Packaging Price List

The Trade module makes it possible to administer the prices of Reusable Packaging items through Sales Price Lists.

Only Reusable Packaging items that have Reusable Packaging Subtype Free, can be added to the Price lists.

When an item has a BOM assigned, for the items in the regular BOM, the displayed price is the simulated Unit Price, without discounts.

When Reusable packaging needs to be added to the sales document from a linked BOM, and the item price is noted on a price list, the price that will be noted on the document is the Unit Price from the price list.

***Remark:** the price of Reusable Packaging is not added to the total price on a the combi item details page, when added to a combi item. It is printed separately on labels that can be printed for the item.*

39 Email Scenario Recipients

Dynavision Trade makes it possible to manage the CC and BCC recipients for emails that will be composed in Business Central to send documents.

It is possible to manually enter an email-address or to use the email-address of the current user to add to outgoing emails.

1. Choose the search icon, enter **Email Scenario Recipients**, then choose the related link.
2. Choose the action **New** to add a new line to the Email Scenario Recipients. Fill in the information on the line.
 - a. **Email Scenario**
Select the email scenario, to which the email recipient needs to be added.
The options are:
 - i. Default,
 - ii. Invite External Accountant,
 - iii. Notification,
 - iv. Job Planning Line Calendar,
 - v. Interaction Template,
 - vi. Sales Quote, Order, Invoice, Credit Memo,
 - vii. Purchase Quote, Order,
 - viii. Reminder,
 - ix. Finance Charge,
 - x. Service Quote, Order, Invoice, Credit Memo,
 - xi. Customer Statement,
 - xii. Email printer,
 - xiii. Job Queue Report Delivery
 - xiv. Vendor Reporting,
 - xv. E-AD.
 - b. **Type**
Specifies the recipient email type. The options are:
 - i. **Current User**
The email address of the current user will be added as recipient.
 - ii. **E-mail**
The email address has to be manually specified in the next field.
 - iii. **Salesperson/Purchaser**
The email address that is defined for the selected **Salesperson Code** or **Purchaser Code** on the document will be added as recipient.
 - c. **E-mail**
Specifies the email address that will be added as recipient.
 - d. **Email Recipient Type**
Select how the recipient should receive the email.
The options are:
 - i. CC,
 - ii. BCC.
3. After setting up these recipients, when sending emails for the set up scenario's, the specified recipients will be added to the composed email that will be sent.

40 Barcode support – Scan requisition lines

When Business Central is opened on a mobile device, it is possible to scan barcodes to add items to a requisition worksheet.

40.1 Setup

40.1.1 Configuration Templates

Set up the worksheet template name, location code and journal batch name, to use in transferring the scanned lines to a requisition worksheet template of choice with the correct location configured on the lines.

1. Choose the search icon, enter **Configuration Templates**, then choose the related link.
2. Add new templates for the needed configurations.
3. Specify the fields and their values.

40.1.2 Trade user setup

In the trade User Setup, an extra field is added in order to specify the configuration template that will be used when the specified user has completed the scanning of the items. This will be applied for the transfer to the requisition worksheet by default.

40.2 Usage

The scan functionality can be used through the new page **Scan Requisition Lines**.

1. Choose the search icon, enter **Scan Requisition Lines**, then choose the related link.
2. Scan or enter the items and information in the displayed fields.

a. Barcode

In this field, either choose the action to scan, when the page is opened in a mobile version of Business Central. This will use the camera to scan the barcode of an item.

If the page is opened in the desktop version, a barcode can be entered in this field.

The entered information will be checked against the item reference of the items in the system.

b. Item No

Displays the item no of the scanned item.

c. Description

Displays the item description of the scanned item.

d. Unit of Measure Code

Specifies the unit of measure that will be used to specify the quantity that will be noted on the requisition lines. This will be filled in with the purchase UOM of the item card, and can be edited if needed.

e. Quantity

Specifies the quantity that needs to be noted on the requisition line for the specified unit of measure.

f. Total Lines

Displays the number of lines that should be transferred to the requisition worksheet. These are the items that were scanned in the page.

Choose the value in the field to open the list page of the scanned requisition items. Choose a line to edit, or delete is needed. *It is also possible to long press on a line in the mobile version to select the delete action.*

Choose the cross on the bottom of the page in the mobile version to get the option to delete all lines.

In the desktop version, the actions are available on the Scanned Requisition Lines page.

3. After scanning all items, choose **OK** to transfer the lines to the Requisition worksheet. In case multiple templates are defined, choose a template. In case only one template is defined, this template will be used automatically.

41 Vendor specific reporting

Certain vendors, such as Coca Cola, Alken Maes or AB InBev, require specific reporting. Using the Message Framework, a csv or other needed filetype can be generated which can be delivered to the necessary vendors.

41.1 Setting up the Message Types

These reports can be configured by using the **Message Types** page.

Choose the search icon, enter **Message Types**, then choose the related link.

There are two options to set up the necessary Message Types:

Option 1:

1. Select the plus sign next to the **New** action in the actions bar on the opened page. Choose the action **Get Default Data...**
2. A list opens with a filtered view of the available, not yet downloaded and configured Message Types. Choose the Message Type that needs to be set up and choose the action **Apply**.
3. The Message Type will be created and it is possible to navigate to the created **Message Type Card**.
4. In this card, the fields will be filled in with the information that has been set up in the Data link for the Message Type.
5. After the creation of this Message Type, the Card can be edited in case something needs to be changed. *Remark: once the message type has been downloaded, it will not be visible anymore when choosing the **Get Default Data...** action again. The Card needs to be managed in the system.*

Option 2:

1. Choose the action **New** to set up a new **message Type** card.
2. Specify the necessary fields for the specific vendor report.
3. In the Format field, choose either:
 - a. AB Inbev,
 - b. Alken-Maes
 - c. Coca Cola, or
 - d. Coca Cola Purchase commitment.
4. *Remark: the fields of the Message Type card are described in the Dynavision Connect manual.*

41.2 Configuration Vendor Reporting

The specific Vendor Reporting has to be set up by configuring the Vendor Reporting Customers, the Vendor Reporting Items and the specific Vendor Report.

41.2.1 Vendor Reporting Customers

In the Vendor Reporting Customers, all relevant customers need to be noted that need to be added to the Vendor Report.

1. Choose the search icon, enter **Vendor Reporting Customers**, then choose the related link.
2. On the page that opens, a list is shown of all Customers that have already been set up to be added to the Vendor Report.
 - a. **Customer No.**
The number of the added customer.
 - b. **Message Type Code**
Specifies the Message Type Code to which the customer has been added.
 - c. **Name**
Displays the Name of the selected Customer No.
3. It is possible to choose the action **New** in order to add one customer to a report, or to choose the action **Add Customers** in order to add multiple customers based on specified filters to a report.
4. When choosing the action **Add Customers**, a screen opens in which filters and options need to be specified in order to add the customers.
 - a. **Message Type Code**
Specifies the code of the vendor reporting message type to generate the data for.
 - b. Optionally select the **customer No.** or numbers that need to be added to the selected Message Type Code. Or use other filters to add customers to the selected Message Type.
5. Choose **OK**. The Customer(s) that fit the specified filters will be added to the selected Message Type Code.

*Remark: the action to add customers in bulk can also be accessed by choosing the search icon, enter **Add Vendor Reporting Customers**, then choose the related link.*

41.2.2 Vendor Reporting Items

The Vendor Reporting Items contains a summation of all items that need to be added to a specific Vendor Report.

1. Choose the search icon, enter **Vendor Reporting Items**, then choose the related link.
2. On the page that opens, a list is shown of all Items that have already been set up to be added to the Vendor Report.
 - a. **Item No.**
Specifies the item no. of the item that has been added to the Vendor Report.
 - a. **Message Type Code**
Specifies the Message Type Code to which the item has been added.
 - b. **Description**
Displays the description of the selected item.
 - c. **Unit of Measure Code**
Specifies the reporting Unit of Measure Code.
 - d. **Item Value From**
Specifies the name that will be used to show on the report for the item.
 - e. **Item Reference**
Specifies the Item Reference that will be shown on the report.
3. It is possible to choose the action **New** in order to add one item to a report, or to choose the action **Add Items** in order to add multiple items based on specified filters to a report.
4. When choosing the action **Add Items**, a screen opens in which filters and options need to be specified in order to add the items.
 - a. **Message Type Code**
Specifies the code of the vendor reporting message type to generate the data for.
 - b. **Item Value From**
Specify the field from which the Item reference that will be printed on the report for the item(s) will be fetched.
The options are:
 - i. Item Reference,
 - ii. Item Identifier,
 - iii. GTIN,
 - iv. Item No., and
 - v. Free text.
 - c. **Default UoM**
Specify the default Unit of Measure that will be printed on the report for the item.
The options are:
 - i. Base Unit of Measure,
 - ii. Sales Unit of Measure, and
 - iii. Purchase Unit of Measure.

- d. **Include Variants**
Specifies if the Vendor Reporting Item records should also be created for the variants of the item (if there are variants available).
 - e. Optionally select the **Item No.** or numbers that need to be added to the selected Message Type Code. Or use other filters to add items to the selected Message Type.
5. Choose **OK**. The Item(s) that fit the specified filters will be added to the selected Message Type Code.

*Remark: the action to add items in bulk can also be accessed by choosing the search icon, enter **Add Vendor Reporting Items**, then choose the related link.*

41.2.3 Vendor Reporting

The Vendor Reporting page is used to generate the Vendor Specific Reports, based on specified options.

1. Choose the search icon, enter **Vendor Reporting**, then choose the related link.
2. Specify the options for generating the desired Vendor Specific Report.
 - a. **Message Type Codes**
Select the Message Type that needs to be generated. This is one of the Message Types that have been set up, as described in section [Setting up the Message Types](#).
 - b. **Communication Method**
Specifies the Communication Method for the generated report.
The options are:
 - i. Download,
 - ii. Email, and
 - iii. FTP.
 - c. **Start Reporting Dateformula**
Specifies the date formula to calculate the start date for generating the Vendor report.
 - d. **Start Reporting Date**
Specifies the start date for generating the Vendor report.
 - e. **End Reporting Dateformula**
Specifies the date formula to calculate the end date for generating the Vendor report.
 - f. **End Reporting Date**
Specifies the end date for generating the Vendor report.
3. After specifying the options, choose **OK** to generate the report, *the report can also be scheduled*.
4. The Report will generate the file using the customers and items set up in the setup pages.

42 Purchase order export – Prik & Tik

42.1 Setup

When working with partner Prik & Tik, the purchase order created in Business Central for this Vendor can be exported in the xml-format.

Navigate to **Message Types** to set up the functionality for the export.

42.1.1 Setting up the Message Type

Choose the search icon, enter **Message Types**, then choose the related link.

There are two options to set up the necessary Message Type:

Option 1:

1. Select the plus sign next to the **New** action in the actions bar on the opened page. Choose the action **Get Default Data...**
2. A list opens with a filtered view of the available, not yet downloaded and configured Message Types. Choose the Message Type that needs to be set up and choose the action **Apply**.
3. The Message Type will be created and it is possible to navigate to the created **Message Type Card**.
4. In this card, the fields will be filled in with the information that has been set up in the Data link for the Message Type.
5. After the creation of this Message Type, the Card can be edited in case something needs to be changed. *Remark: once the message type has been downloaded, it will not be visible anymore when choosing the **Get Default Data...** action again. The Card needs to be managed in the system.*

Option 2:

1. Choose the action **New** to set up a new **message Type** card.
2. Specify the necessary fields for the specific vendor report. In the **Format** field, select Prik&Tik Order (XML).
3. *Remark: the fields of the Message Type card are described in the Dynavision Connect manual.*
4. Make sure to define a partner code using the action **Partners**.
 - a. Create a new partner Prik&Tik with **Default communication** set to **Default**.
 - b. Navigate to **Mappings**, select **Source Type** vendor and the select the Prik&Tik vendor in the **Source Code** field.

42.2 Send Message

If the option **Auto Send** is activated on the **Message Type Card**, when releasing or posting a purchase document, a message will be automatically generated and downloaded as XML file (set up in the Message Type Card).

If the option is disabled, it is still possible to manually generate the file on the Purchase Order. Choose the action **Send Message**, which can be found under **Actions > Functions**. If the Purchase Order has the correct parameters noted (vendor is Prik & Tik), the XML file will be generated and downloaded.

***Remark:** it is important that items that are bought from Prik&Tik and need to be noted on the generated XML file have the correct **Item Reference** entries type Vendor. Otherwise the generated XML file will not be generated correctly.*

On the page **Messages**, an overview can be found of the messages that have been generated and/or sent to different Partners set up in the Message Types.

Using a retention policy, the messages that are no longer relevant will be deleted after a certain amount of time.