DYNAVISION

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1 Introduction 6
2 Installation 6
2.1 Extension 6
3 Extension on Item List Page 7
4 Item information in factbox on sales documents 7
5 Created by or Modified by fields on quotes/orders 7
6 Update posting date on documents 8
7 Update Expected Receipt Date for Purchase Lines 9
8 Legacy search experience – add Search name to list 9
9 Synchronize Item Description 10
10 Advanced Search functionality 10
10.1 Item search - item description 10
10.2 Item search – item reference 11
11 Create Barcode/Vendor Item Reference 12
11.1 Create Vendor Item Reference logic 12
12 Barcode Worksheet 13
13 Periodic recurring documents 14
13.1 Recurrence schedules 14
13.2 Usage on Blanket Sales/purchase Order 14
13.2.1 Recurring Sales order 16
13.2.2 Copy document 16
13.2.3 Archive 16
14 Assign Document Types 17
15 Shelf no information on sales documents 17
16 Sales order – E-mail Pro Forma invoice 18
16.1 Action on list page and sales order 18
16.2 E-mail scenario 18
17 Sent emails factbox 18
18 Create Sales document for purchase order 19
19 Create purchase quotes for purchase order 20
20 Purchase/sales line details – related documents 20
21 Multiple payment methods on a sales or service document 21
21.1 Setup 21

21.1.1 Trade setup 21
21.1.2 General Journal Templates 21
21.2 Usage on sales or service documents 22
21.2.1 Posting of payments with combine shipments 23
21.3 Payments overview 23
22 Processing invoiced payments in the case of collective billing 24
23 Advanced Combine Shipments 25
23.1 Advanced Combine Shipment Methods 25
23.2 Advanced Combine Shipment Task 28
24 Prevent duplicate invoicing of shipments/receipts 29
25 Ext. doc. No. on orders/combined shipments 29
26 Flow to Sales/Purchase/production Trx on attachments 30
26.1 Document Flows 30
26.2 Document Categories 31
26.3 Usage 31
26.3.1 Remarks 32
27 Preview PDF attached to certain document types 32
27.1 Trade User Setup 32
27.2 PDF section in fact box on detail page of documents 33
27.3 View PDF on Attached Documents 33
28 Document Sending Profiles – Attachments 34
29 Combi items 35
29.1 Combi Items Setup 35
29.2 Creation of Combi Items 36
30 Item template linked to item category 37
31 Pop-up comments on Item/Customer/Vendor 38
31.1 Open the Pop-up Comments page 38
31.1.1 Open on the Customer Card 38
31.1.2 Open on the Vendor Card 38
31.1.3 Open on the Item Card 38
31.2 Pop-Up Comment Configuration 39
32 Minimum order amount on vendor 40
32.1 Requisition/Planning worksheet - Check Vendor Minimum Amount 40
33 Document versioning 41

33.1 Trade Setup 41
33.2 Usage on documents 41
33.3 Archive pages 42
33.4 Document attachments – archived versions 42
34 Optimalization of recurring lines 43
34.1 Recurring Sales lines listpage and card extensions 43
34.2 Update recurring lines 43
34.3 Extra actions on Recurring Lines 44
34.4 Save Recurring lines based on unposted sales documents 47
35 Sales order - Select recently shipped items 48
35.1 Configuration 48
35.2 Usage on sales orders 48
36 Item Selection – assign attributes 48
37 Item attribute query 49
38 Purchase Proposition 50
38.1 Purchase Proposition Calculations 50
38.1.1 General tab 50
38.1.2 Sales Number tab 51
38.1.3 Demand tab 55
38.1.4 Supply tab 56
38.2 Order Proposal Templates 56
38.2.1 General tab 56
38.2.2 Filters tab 57
38.2.3 Requisition/Planning Worksheet tab 57
38.3 Calculating Purchase proposition 58
38.4 Purchase Proposition History 58
39 Physical Inventory Orders – serial numbers and lot numbers 60
40 Phys. Inv. recording – take over expected quantity 61
41 Second unit of measure – Inventory Order 62
42 Second unit of measure – Inventory Journal 62
43 Second unit of measure – Warehouse Physical Inventory Journal 63
44 Second unit of measure – Item Availability by Lot No. 63
45 Extended description for tariff numbers 64
46 Configuration Templates to create documents 64

46.1 Configuration Templates 64
46.2 Usage example Sales Document 66
47 Customer/Vendor Template Lines 67
48 Automatic assignment of lot numbers 68
48.1 Additional remarks 68
49 Additional checks on price list rules 69
50 Price list lines when deleting item UOM 69
51 Planning Flexibility 70
51.1 Remarks 70
52 Requisition/planning worksheet enhancements 71
52.1 Accept Action on Requisition/Planning worksheet 71
52.2 Default location on Requisition worksheet 71
52.3 Date formulas on requisition/planning worksheet 72
52.4 Calculate Plan - Exclude Manual Lines 72
52.5 Suggest Blanket Order on Requisition Worksheet 73
52.5.1 Trade Setup 73
52.5.2 Usage on requisition worksheet 73
53 Transfer-from Code on location 74
54 Transfer route – default direct transfer 74
55 Trade and Planning and Dispatch 75
55.1 Register multiple payments on transport trip line 75
55.2 Reserved quantity on outbound whse. request lines 75
55.3 Information on inbound lines 75
55.3.1 Transfer-from and ship from information 75
56 "Completely received/shipped" and "Create back order" on purchase/sales order/lines 76
57 Field warehouse receipts/shipments 76
58 "Auto explode BOM" on Sales/purchase lines 77
59 Additional user settings 78
59.1 Trade User Setup 78
60 Removing obsolete and redundant items 80
61 Correct negative inventory 81
62 Dynamic fields 82

62.1 Export and import of Dynamic fields 84
63 Reusable Packaging Price List 84
64 Email Scenario Recipients 85
65 Email body layout depending on language 87
65.1 Setup 87
65.1.1 Custom Report Layouts 87
65.1.2 Report Layouts 87
65.1.3 Report selection – sales/purchase 88
66 Select Document Layout for print/mail 88
67 Barcode support – Scan lines 89
67.1 Setup 89
67.1.1 Configuration Templates 89
67.1.2 Trade user setup – Requisition worksheet Template 89
67.2 Usage – requisition worksheet 90
67.3 Scan lines on purchase, sales or trade documents 91
67.3.1 Create document using template 91
67.3.2 Scan Lines on document 91
68 Vendor specific reporting 92
68.1 Setting up the Message Types 92
68.2 Configuration Vendor Reporting 93
68.2.1 Vendor Reporting Customers 93
68.2.2 Vendor Reporting Items 93
68.2.3 Generic vendor reporting 95
68.2.4 Vendor Reporting 95
69 Purchase order export – Prik & Tik 96
69.1 Setup 96
69.1.1 Setting up the Message Type 96
69.2 Send Message 97

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.
4. Activate the trial as described in following **Get Started guide**.

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 Item information in factbox on sales documents

On the sales documents, the factbox with Item details is added. This factbox contains information, such as the quantity that is currently added to certain documents, and inventory information.
This factbox is added to following documents: Sales Blanket Order, Sales Quote, Sales Order, Sales Return Order, Sales Invoice and Sales Credit Memo.

***Remark**: the factbox is hidden by default for performance reasons. When the factbox is shown, certain delay can be experienced on the document.*

5 Created by or Modified by fields on quotes/orders

On the Sales and purchase quotes and orders, a field is added that contains the username of the user that created the quote or order and the username of the user that modified the quote or order.

These fields are hidden by default, and can be added trough personalization.

6 Update posting date on documents

When posting a document, it is possible to the posting date on the document. When and to what the posting date should be replaced on the document can be defined in the **Posting Date Setup**, that is accessible via the page **Trade Setup**, **User Setup** or by searching for the page.

1. Navigate to the **Trade Setup** page or **User Setup**, or choose the search icon, enter **Posting Date Setup** and choose the related link.
2. Choose the action **Posting Date Setup**.
3. Choose the option **Get Default Data** to create lines for each type of document.
    a. If there is a line from which the setup should be copied to the other lines, first add the line for the document type, select the line and choose the action **Get Default Data**.
4. For each line, specify following fields.
    a. **User ID**
    Specifies the ID of the user for which the setting is defined. Leave blank for all users.
    b. **Document Type**
    Specifies the document type the setup applies to.
    The options are:
    c. **Update Posting Date on Ship/Receive**
    Defines how to replace the posting date when posting a document using "ship" or "receive".
    The options are:
        i. **Work Date**
        ii. **Previous Calendar Date** *This is the previous working date from the location base calendar.*
    d. **Update Posting Date on Invoice**
    Defines how to replace the posting date when posting a document using "ship and invoice", "receive and invoice" or "invoice".
    The options are:
        i. **Work Date**
        ii. **Previous Calendar Date** *This is the previous working date from the location base calendar.*
5. ***Remark:*** *If a certain document posting date may not be overwritten, there is an option that can be added to a document, through personalization. This option,* ***Keep Posting Date****, when enabled Specifies that the posting date of the document may not be overruled.*

7 Update Expected Receipt Date for Purchase Lines

For a planning /requisition worksheet, expected receipt dates are important. Dynavision Trade adds the functionality to update the expected receipt date for purchase lines, in order for those lines to be still included in the calculations by the system.

1. Navigate to the page **Purchase Lines.**
2. (Optionally) select the purchase lines to be updated. *This can also be changed in the report page.*
3. Choose the action **Update Expected Receipt Date…**
   a. This will update all past expected receipt dates to today for released purchase order lines with a quantity to receive.
      Lines listed on warehouse receipts are ignored.
4. Specify the information to run the report for the desired purchase lines.
   a. **Include Partially received**
      Enable this to include the purchase lines that are partially received as well in the update. If disabled, these lines will be skipped.
   b. **Filter: Purchase Line**
      Optionally filter the lines that need to be updated.
5. Choose **OK** to execute the report.

8 Legacy search experience – add Search name to list

Dynavision Trade makes it possible to add the Search name (for Vendors or Customers) or the Search Description (for items) to the dropdown box when searching for items, customers or vendors using the legacy search functionality.
The column is by default not shown in the dropdowns, but can be added.

1. On a page where the dropdown is used (to e.g. select an item on a document or a customer or vendor), go to the field and open the dropdown by clicking on the arrow in the field.
2. Choose **Select from full list.**
3. Use the **Personalization** functionality of Business Central to add the column to the list page that is now displayed.
4. Close the page.
5. The column will now be shown at the end of the dropdown when selecting an item, vendor or customer *(depending on which page the column was added)* and can be used to find the correct entity.

9 Synchronize Item Description

Standard Business Central does not synchronize changes to item descriptions to existing price list lines.
In order to make this possible, the option **Synchronize Item Description** is added to the **Trade Setup**.

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. Navigate to the tab **Items**.
3. Enable the option **Synchronize Item Description**.

10 Advanced Search functionality

10.1 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.

4. Choose the search icon, enter **Trade Setup**, then choose the related link.
5. Navigate to the tab **Item Search**.
6. 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 <u>all search words, in any order</u>.
   b. **All words in input sequence**
      This will return items containing <u>the search words in the entered order</u> only.
7. 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.
   Remark: *if wildcards (e.g. *?) are used in the searching of item references, the system will always display the reference list with the corresponding results.*

Remark: *the functionality is also supported on service quote/Order, in the* ***Service Item Worksheet*** *if the type is set to* ***Item****. In the* ***Service Invoice*** *the functionality is also supported when the Type on the line is set to* ***Item****.*

10.2 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 by reference – Pattern**
    Specifies in what way the system will search in the item references.
        i. **Starts With**
        The system will search item references that begin with the entered input (REF*). This is a faster method than the contains with search method.
        ii. **Contains**
        The system will search item references in which the entered input can be found anywhere in the item reference (*REF*). This is slower than the search method that only searches the start of the item reference.
    c. **Search on All References**
    Enable this option to search item references from <u>all</u> vendors and customers.

Remark: *the functionality is also supported on service quote/Order, in the* ***Service Item Worksheet*** *if the type is set to* ***Item****. In the* ***Service Invoice*** *the functionality is also supported when the Type on the line is set to* ***Item****.*

11 Create Barcode/Vendor Item Reference

It is possible to easily create a barcode item reference or vendor item reference when entering a GTIN or Vendor on an item card.

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. Enable the needed options under the **Items Tab**.
    a. **Create Barcode Reference**
    Specifies if a barcode item reference should be created based on the GTIN.
    b. **Create Vendor Item Reference**
    Specifies if a vendor item reference should be created based on the Vendor Item No.
    c. **Vendor Item Reference Unit**
    Specifies which unit of measure to use for the vendor item reference creation.
    Only selectable if the option Create Vendor Item Reference Unit is enabled.
    The options are:
        i. **Base Unit of Measure**
        ii. **Purchase Unit of Measure**

11.1 Create Vendor Item Reference logic

Whenever the Vendor No./ Vendor Item No./ Base Unit of Measure or Purchase Unit of Measure (depending on setup) is changed on the item card, following actions will be performed.

- Remove the Vendor Item Reference that is internally marked as 'System Created'.
- Check if a vendor item reference exists for the item fields
    - If not, create a vendor item reference with the item fields and mark this as 'system created'.

Remark: *existing vendor item references will not be updated to have the status 'system created'. Only those created after the last update of the app (31/10) will be marked if the option is enabled and the system created the reference.*

12 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.

13 Periodic recurring documents

13.1 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.

13.2 Usage on Blanket Sales/purchase Order

Create a Blanket Sales/purchase Order for the customer/vendor, for which recurring 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 orders can be created.
- **Ending Date**
  Specifies until which date the new recurring orders can be created.
- **Frequency**
  Specifies the recurrence schedule that will be used to create new recurring orders. The set date formula in the selected recurrence schedule will be used to calculate the Next Order Date.
- **Last Shipment Date/Last Receipt Date**
  Specifies the date on which the (partial) shipment or receipt is posted for the created recurring order. This date will serve as basis to calculate the Next Order Date.
- **Next Order Date**
  Specifies the next date that a new 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/purchase Order.
The field **Recurring quantity** will appear on the lines after entering an item and quantity. This is the quantity that will be added on the created recurring orders that will be created. This will be filled in with the quantity that is specified 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/Purchase 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 instead. If yes, the report page opens to create the recurring order.
On the Blanket Sales/Purchase 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 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 Blanker 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.*

13.2.1 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.
The quantity on the blanket sales order will be increased with the quantity that is on the recurring sales order, when the recurring order is created.
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.

13.2.2 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.*

13.2.3 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.

14 Assign Document Types

There is are extra tables added in Dynavision Trade, that can be used to classify sales, purchase or service documents.
We will discuss the Sales Document Types, but the Service and purchase Document types work in the same way, only with the page **Service Document Types or Purchase Document Types.**

1. Choose the search icon, enter **Sales Document Types**, then choose the related link.
2. Add each type of sales document that can occur. Enter **Code** and **Description**.
3. After setting up the necessary information, on the **Sales documents**, in the field **Type** the sales document type can be selected.
    a. This Sales Document Type can be used in filtering, and will be transferred to the Posted document and the archived version of the sales document.

15 Shelf no information on sales documents

On the sales document, in the sales lines factbox, the information is added for the shelf no. for the item that is selected on the sales document lines.
The information shown in the factbox is either the SKU shelf no. if there is an SKU set up for the item, or this displays the shelf no. of the item card if no SKU's are defined for the item. Clicking on the value opens the SKU or item card from which the information originates.

16Sales order – E-mail Pro Forma invoice

In order to e-mail the Pro Forma invoice for a sales order, there is an action added on the sales order list page and sales order page.
There is also an E-mail scenario added to make this possible.

16.1 Action on list page and sales order

On the list page and card of the sales orders, there is an action added that can be used to compose the email for sending the Pro Forma Invoice to customers.

1. Navigate to the list page **Sales Orders**.
2. Select the sales order from which the Pro Forma Invoice needs to be e-mailed. Either open the sales order and execute the action, or on the list page select **Print/Send** and **Email Pro Forma Invoice…**
3. The Pro Forma document will be added as PDF attachment to the e-mail, together with optional attachments that are set up in the email scenario attachments.

16.2 E-mail scenario

It is possible to assign the email scenario Pro Forma Invoice to a certain email account, or to add a default attachment when sending the Pro Forma Invoice to customers.
To make this possible, there is an e-mail scenario added for the Pro Forma Invoice in Business Central that can be used in the setup of the email scenario's and email scenario attachments.

17 Sent emails factbox

On several document cards, a factbox is added in which the sent emails for the document can be seen.
When an email is sent for the document on the card, this will be added to the list of sent emails, with a timestamp and the e-mail address of the sender of the email. It is possible to open the sent email and see more details of the e-mail.

18 Create Sales document for purchase order

Dynavision Trade makes it possible to create a sales document, starting from a created purchase order.

1. Navigate to the Purchase order for which a sales document needs to be created.
2. Choose the action **Create Sales Document.**
3. The **Create Sales Document** dialog opens. Fill in the information needed and continue using **OK**.
    a. **Document Type**
    Specifies the type of the sales document that will be created. The options are Quote or Order.
    b. **Sell-to Customer No. and Name**
    Select the Sell-to Customer Number that needs to be added to the newly created sales document.
    c. **Template Code**
    Optionally specify the Template Code that needs to be applied on the newly created sales document.
4. The document will be created with the lines that are noted on the purchase document.
    Remark: *Item charges, prepayment lines, jobs, blocked items, deferrals, item tracking, drop shipment, special order items, returns,… will not be copied to the newly created sales document.*

19 Create purchase quotes for purchase order

Dynavision Trade adds the possibility to create purchase quotes for a purchase order. This makes it possible to create multiple quotes for a purchase order created for a dummy vendor, for different vendors, and determining the vendor from which should be bought after receiving the prices and delivery times from the vendor.
Once the vendor has been chosen from which the item(s) will be bought, the quote can be converted into a purchase order, which will delete the obsolete quotes and the dummy purchase order.

1. Run the Planning/requisition worksheet and create a purchase order (or manually create a purchase order).
2. Choose the action **Create Purchase Quotes**, which can be found under the "tab" **Prepare**.
   ***Remark**: if the purchase order is already created from a quote, a message will be shown to confirm the creation of the purchase quote(s).*
3. A dialog opens in which the vendors are displayed that are configured on the item as vendors. Select one or more of the shown vendors to create purchase quotes for these vendors. Choose **OK** to create the purchase quotes.
   In the field **Purchase Quotes**, it will be indicated how many quotes are created for the order, and clicking on the number will open the list of quotes.
4. These quotes can now be sent to the vendors. Once the vendor is determined from which the item(s) will be bought, convert the quote to purchase order using the Business Central function **Create Order**.
5. The lines that are added on the newly created order will be deleted from the other quotes that were created and the original order on the "dummy" vendor. If all lines are added on converted orders, the remaining quotes will be deleted, and the original order on the "dummy" vendor will be deleted as well.
6. Process the purchase order.

20 Purchase/sales line details – related documents

In the factbox on **Purchase/Sales Quotes** and **Purchase/Sales orders**, some fields are added to quickly view if an item line on the document was recently ordered.

1. Select the **line** on the **quote/document.**
2. In the factbox, in the section **Purchase/Sales Line Details**, flow fields will be visible for the selected line under the subtitle **Related**.
   a. **Purchase/Sales Quotes**
      Shows the number of lines on other quotes for the same item and same buy-from vendor/Sell-to customer.
   b. **Purchase/Sales Orders**
      Shows the number of lines on other orders for the same item and same buy-from vendor/ Sell-to customer.
   c. **Posted Purchase/Sales Invoices**
      Shows the number of posted invoice lines for the same item and same buy-from vendor/ Sell-to customer.

21 Multiple payment methods on a sales or service document

It is possible to register multiple payment methods on a sales document (incl. sales credit memo) or service document.
Example given, one part of the document is paid by card, the other part of the document is paid by cash. Example for a sales credit memo is a refund given cash.

21.1 Setup

21.1.1 Trade setup

It is possible to hide the multiple payments section on the sales and service documents, if this functionality is not needed.

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. In the section **General**, enable **Use Multiple Payment Methods**. This option specifies if multiple payment methods are used in sales or service documents.

21.1.2 General Journal Templates

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.

Remark: the paid amount that will be printed on the report layouts of Dynavision Layouts is calculated as the sum of all detailed customer ledger entries, excluding the initial entry of the document.

21.2 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.
3. In the payment tab, under the payment lines, the field **Remaining amount** displays the amount that still needs to be paid. This is calculated by taking the total amount of the document and subtracting the payment method lines that are defined. When this value is 0, the amount is paid in full.
    a. Clicking on the remaining amount value will add this amount to the current selected payment method line.
    b. The remaining amount can also be filled in on the payment method line by creating this line and clicking on the three dots in the amount field.

c. ***Remark:*** *the field value is not updated when the document lines are edited. Refresh the sales order or invoice to let the field reflect the correct value.*

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

21.2.1 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)***.

21.3 Payments overview

An overview of the payments on (posted) documents can be viewed in a list.

1. Choose the search icon, enter **Payments**, then choose the related link.
2. A list of the payments is shown. There are views defined by Dynavision to filter the entries shown on the page.
    a. **All:** displays all payments registered on either posted or non-posted documents.
    b. **Sales (Non-posted):** displays all payments registered on non-posted sales documents.
    c. **Sales (Posted):** displays all payments registered on posted sales documents.
    d. **Service (Non-posted):** displays all payments registered on non-posted service documents.
    e. **Service (Posted):** displays all payments registered on posted service documents.
    f. **Non-posted:** displays all payments registered on non-posted sales/service documents.
    g. **Posted:** displays all payments registered on posted sales/service documents.

22 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 trough 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.*

23 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,…*

23.1 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.
    Remark: *if the date formula is not filled in, the system will only fetch the lines using the requested posting date in the report page.*
    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.
    f. **Invoice To**
    Specifies the customer that needs to be noted in the field **Customer No.** on the combined invoice.
    The options are:
        i. **Bill-to Customer**
        The shipments of the different "sell-to customers" will be grouped, based on the Bill-to customer that is noted on the linked sales orders.
        ii. **Sell-to Customer**
        The shipments will be grouped using the sell-to customer that is noted on the linked order.

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,
      v. Shipment Line, and
      vi. Free Text.

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. **Text Frequency**
   Specifies how the invoice text needs to be added to the created invoice line. The options are:
   i. **For Every Line**
      The text is added before every shipment/order line that gets inserted on the invoice.
   ii. **Once Per Shipment**
      The text is added once per unique shipment document (*even if multiple lines are added from that document to the sales invoice).*
   iii. **Once Per Order**
      The text is added once per unique originating sales order (*even if multiple lines are added from that document to the sales invoice).*
   iv. **Once Per Resulting Invoice**
      The text is added once per invoice, regardless of how many orders/shipments are combined.
      Remark: the system will check if the text to be added was already added to the invoice, so if the text that is added with option "once per resulting invoice" uses a field that differs, the text will be added again on the invoice with the different field 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.

23.2 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.
     *The advanced combine shipment task will take this date into account to find documents that have **Posting date** that lies within the specified date formula range.*
   - **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.

Remark: *the combine shipment task can be scheduled using a job queue entry. In this scheduled task, it is possible to use date formula's to fill in the posting date on the created sales invoices (e.g. CM for the last day of the month), and to fill in the document date of the created invoice (e.g. 0D for the date of creation).*

24 Prevent duplicate invoicing of shipments/receipts

When invoices are created using the (advanced) combine shipments, get shipment lines or get receipt lines, it is possible that the lines are duplicated on the created documents.
To prevent the creation of duplicate invoices, there are options added on the Trade Setup.

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. In the **General section**, enable or disable the functions.
    a. **Prevent Duplicate Invoicing (Sales)**
    Specifies if shipments and return receipts should be excluded from duplicate invoicing. This will prevent adding non-invoiced shipment and return receipt lines to sales documents, if the lines are already included on an unposted document.
    b. **Prevent Duplicate Invoicing (Purchases)**
    Specifies if receipts and return shipments should be excluded from duplicate invoicing. This will prevent adding non-invoiced receipts and return shipment lines to purchase documents, if the lines are already included on an unposted document.

25 Ext. doc. No. on orders/combined shipments

When batch posting Sales/service Invoices, Combine shipment invoices or Advanced combined shipment invoices, an extra functionality is added to fill in the value of the External Document No. with 'NA' when this is not filled in on the document that is posted.
This external document no. field needs to contain a value when PEPPOL is used, otherwise the invoices cannot be processed by the PEPPOL framework.

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. In the **General** section, enable or disable the setting **Update External Document No. (Batch Post).** This option specifies if empty external document numbers should be updated to 'NA' when batch posting sales invoices, or using the combine shipment reports.

When using the (Advanced) combine shipment functionality, with posting of the invoices that are created, the field **External Document No.** will be filled in with 'NA' if the option is enabled.
If sales invoices are posted using the action **Post Batch** on either the **Sales Invoices** listpage, or the **Sales/Service Orders** listpage, if no external document no. was filled in on the document, the field will be filled in with the value 'NA'.

26 Flow to Sales/Purchase/production Trx on attachments

On the attachments in sales and purchase documents, there is an option **Flow to Sales/Purchase/Production 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.

26.1 Document Flows

In Document Flows, it is possible to set up the default values for the fields **Flow to Sales Trx, Flow to Purchase Trx** and **Flow to Production 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.
    g. **Flow to Service Trx**
    Specifies if attachments that match this document flow will be copied to purchase documents.
    h. **Flow to Production Trx**
    Specifies if attachments that match this document flow will be copied to production 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	Flow to Service Trx
1	Item	Item Category: ROOD	Code: ALLON	☑	☐	☑
2	Item	Item Category: ROOD	-	☐	☑	☐
3	Item	-	-	☑	☑	☑

26.2 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**, **Flow to Sales Trx, Flow to Service Trx** and **Flow to Production Trx**.

26.3 Usage

When files are uploaded with Drag and Drop, using a Document Category that has settings for the fields Flow to Sales/Purch./Service 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.

26.3.1 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.

27 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.

27.1 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.

27.2 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** of **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)*.

27.3 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.

28 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).*

29 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.

29.1 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 van 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.
        The option **Price includes VAT** needs to be enabled on the sales price list. The Price list should be configured for all customers.
    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.

29.2 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.

30 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.

31 Pop-up comments on Item/Customer/Vendor

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.

31.1 Open the Pop-up Comments page

31.1.1 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**.

31.1.2 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**.

31.1.3 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**.

31.2 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).

32 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 and planning worksheet at the bottom of the page. This will display the value for the current selected line.
***Remark**: in the planning worksheet, only the lines with Ref. Order Type Purchase, and Accept Action Message enabled, will be taken into account.*
In the purchase orders, the minimum amount can be viewed in the **Vendor statistics factbox.**

32.1 Requisition/Planning worksheet - Check Vendor Minimum Amount

On the requisition and planning 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.
***Remark**: in the planning worksheet, only the lines with Ref. Order Type Purchase, and Accept Action Message enabled, will be taken into account.*

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.

33 Document versioning

Dynavision Trade makes it possible to work with versions of sales or purchase quotes/orders. The functionality gives the possibility to automatically or manually archive sales or purchase quotes/orders when they are released, when the action Archive Document is executed, or when quotes are converted into orders. The document version will be adapted and shown on the sales quote/order.
This version will also be taken over when shipments are created for the sales orders.

33.1 Trade Setup

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. In the tab **Archive Documents** enable the wanted options.
    a. **Automatic Archiving (Sales)**
    Enable this option to automatically archive sales quotes and orders when they are released, or when quotes are converted into sales orders. This will also update the document version.
    ***Remark**: this also includes blanket and return orders.*
    b. **Automatic Archiving (Purchase)**
    Enable this option to automatically archive purchase quotes and orders when they are released, or when quotes are converted into purchase orders. This will also update the document version.
    ***Remark**: this also includes blanket and return orders.*

33.2 Usage on documents

On the Purchase and Sales quotes and (blanket/return) orders, the field **Version** is added. If the option is enabled in the Trade Setup, this field will be automatically filled in when the document is released or transferred from quote to order.
If the options for automatic archiving are disabled, the version can still be created by using the standard Business Central action **Archive Document**.

The field is a lookup. When clicking on the three dots next to the field, a list opens with the archived versions of the document.
The previous version can be opened, Restored (only sales documents) and Printed (with the standard Business Central report).

The **Version** can be printed on the sales quote, confirmation and shipment, by setting this field as one of the header fields in the report layout setup card.
The version format is as follows: workdate VX. This is the workdate on which the archived version is created.

33.3 Archive pages

The archived documents can always be found by navigating to the page **Archive pages**.
When a document is posted (or made into an order), the document cannot be restored.

33.4 Document attachments – archived versions

When a sales or purchase document is archived, the attachments that are linked to the original documents are also transferred to the archived version.
On the archived versions, the documents can be consulted, and documents can be added or deleted. When restoring an archived version, the attachments of the archived version will also be transferred to the restored document.

If working with external storage, the pointer to the attachments of the sales/purchase document will be added to the archived version. The attachment will not be copied or moved to another location.

When trying to delete an attachment that is also linked to an archived version of the document, the attachment will not be deleted.

34 Optimalization of recurring lines

34.1 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.
- **Limited Items** 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.

The column **Shelf No.** and **Item Category Code** are also added on the recurring lines (these are hidden by default and can be added trough personalization).
When a recurring line is added (using the action Add Items, manually, …) this information will be filled in if available.
Via the update action, the missing information can be refilled if this is completed after the lines were added.

34.2 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.**

34.3 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 **Limited Items**
      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 **Rules**
      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 **Recurring Lines 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.
      The recurring line rules will only be triggered when at least one recurring code is linked to the customer/vendor.
      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,
- **V** Post Code, and
- **VI** Vendor.

(*If the action is executed 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. Limited Items

Specifies if the items on the line of the rule are allowed for the entity or if it will be blocked on purchase/sales lines.
The options are:

- **I** **Allow**
  The line that is specified will be allowed on documents.
- **II** **Block**
  The line that is specified will be blocked on documents. *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:

Standard Line Exclude Rules

Search | New | Edit List | Delete

Code	Description	Entity Type	Enity 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			☑	☑
SKIP EMPTYITEMS	Never ask for an Item with Item Type Empty	Customer		Item		Empty	☑	☑
SKIP COMBI ITEMS	Never ask for an Item with Item Type Combi	Customer		Item		Combi Item	☐	☑
SKIP 1 SPECIFIC ITEM	Skip for 1 specific Item	Customer		Item	981000	Normal	☑	☑
SKIP ALL FOR CUST	Skip all types for a certain customer	Customer	10000				☑	☑

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).*

Recurring Sales Lines | Search | Analyze | New | Edit List | Delete | Card | Update... | Standard Lines Rule Set | More options

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							☐	Manual	Manual	Manual	Manual	☑	☐	☑	☐

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	☐		981000		

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

34.4 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.
   a. Only items with **Item Type Normal** or **Combi Item** will be suggested to be saved.
5. Choose **Finish**. The user gets redirected to the **Recurring Lines** page and the newly defined code is visible.

35 Sales order - Select recently shipped items

Dynavision Trade makes it possible to add items to a sales order that were recently shipped to a customer.

35.1 Configuration

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. In the subsection **Sales**, specify the **Recent Items Period** using a date formula.
    a. This period will be used to filter the shipments that were posted for the customer.
    b. Only shipments for that customer, that fall in the specified period will be shown in the list on the sales order.

35.2 Usage on sales orders

1. On a sales order for a customer, navigate to the sales lines.
2. Choose **Select recent items…** to open a list of items that were shipped in the specified period.
    a. *Remark: if no period is specified, all*
    b. The list shows the items that are not blocked (or blocked for sales), grouped per Unit of Measure.
3. Select either one item to add to the sales order, or multiple items.
4. The line(s) will be added, without a quantity.

36 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 <u>all</u> items.
        ii. If the value is **Gray**, the value was found on <u>some</u> items.
    c. **Unit of Measure**
    Specifies the name of the item or resource's unit of measure, such as piece or hour.

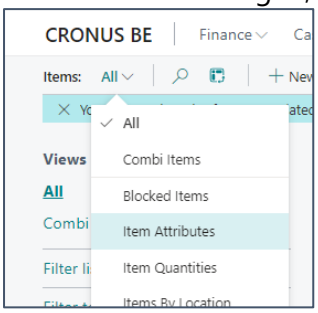
   d. Action
   Specifies the action to perform for the item attribute.

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.

37 Item attribute query

On the **Items** listpage, a query is added to view a list of the item attributes that are configured for the items.

1. Navigate to the **Items Listpage**.
2. Next to the **Items** title (in the action bar) the option is supplied in which the list that is viewed can be changed, either using a predefined filter, or a defines query.



3. Select the arrow next to the text and select **Item Attributes**.
4. An analyze view opens with a list of the items and the configured item attributes.

38 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.

38.1 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.

38.1.1 General tab

Firstly some general information needs to be specified.

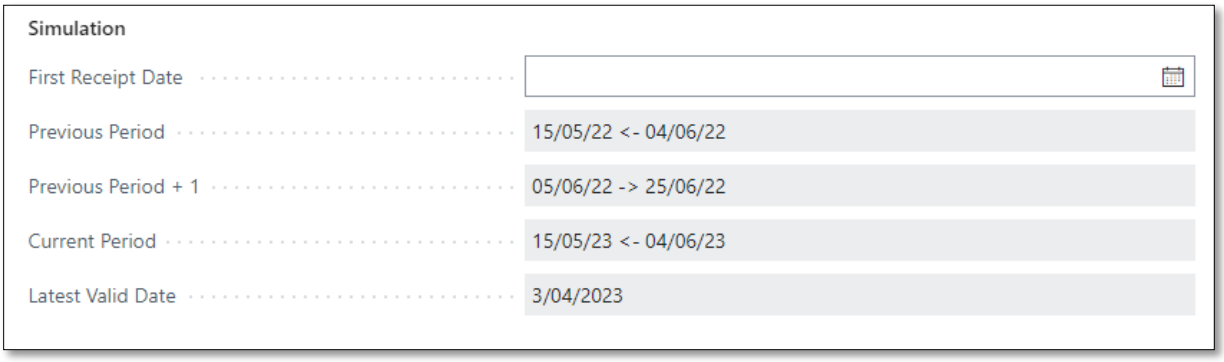
1. **Code**
   Specifies the code for this calculation method.
2. **Description**
   The description for the calculation method.
3. **Document date filter**
   Specifies a date formula to apply on the source documents. This can be used to exclude source documents with dates too far in the future.
   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.

38.1.2 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:



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)

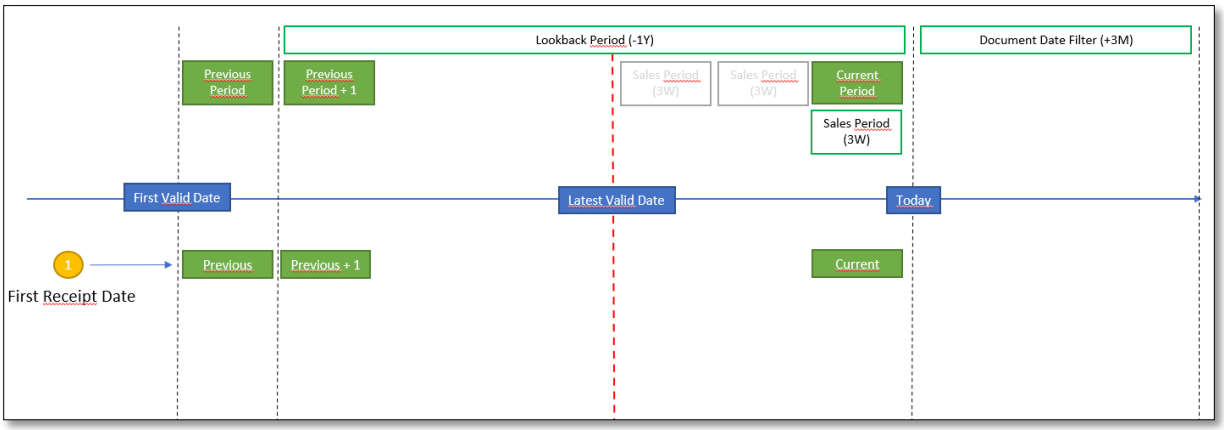
The **Last Valid Date displayed** in the simulation specifies the latest date on which items are included in the calculation of the proposed quantity. New items purchased after this date are excluded from the calculation.
This defaults to three times the specified sales period.
When calculating proposals, 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 <u>four possible scenarios</u>:

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

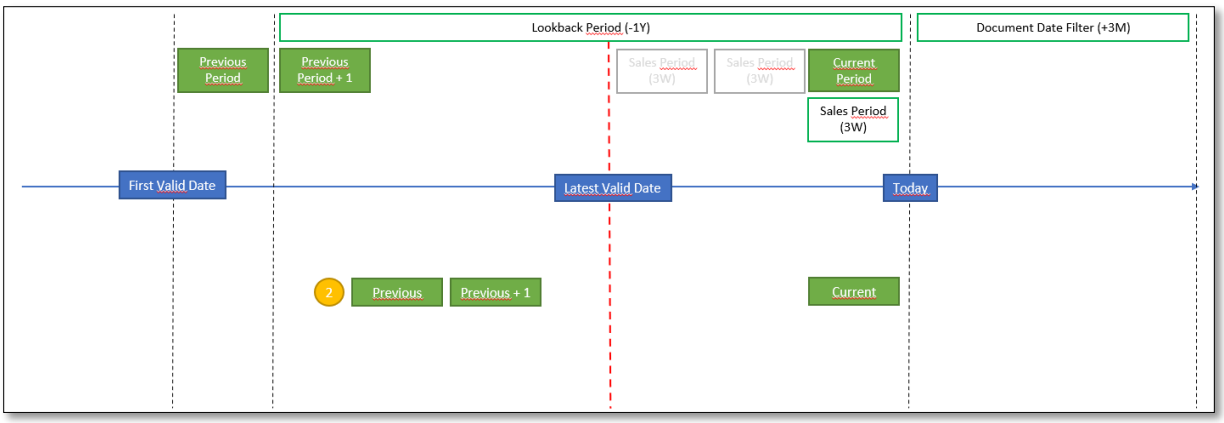
Simulation	
First Receipt Date	
Previous Period	18/05/22 <- 07/06/22
Previous Period + 1	08/06/22 -> 28/06/22
Current Period	18/05/23 <- 07/06/23
Latest Valid Date	6/04/2023

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.

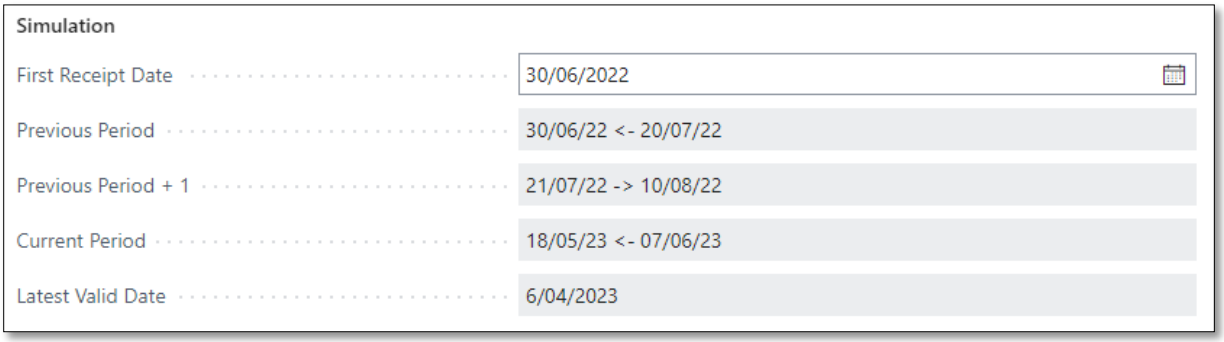


   Example given: the first receipt date of the item is 10/04/2022 (10 pieces). On 20/05/2022, 2 sales orders are created (for 6 pieces of the item total) and shipped. Because the number of sales is 6 in the previous period and current stock is 4, the proposed quantity to purchase is 2 (6 - 4 = 2).

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".

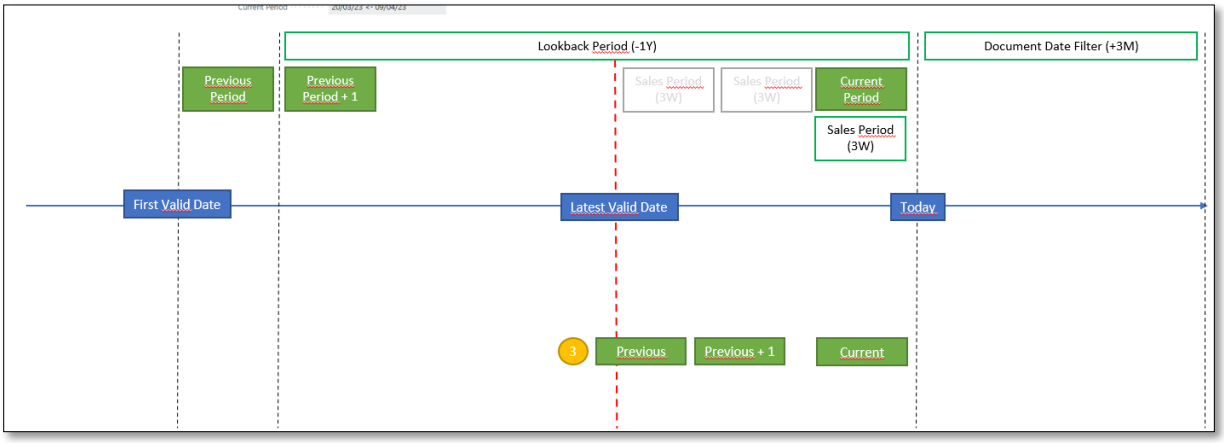


Example given: the first receipt date of the item is 30/06/2022 (20 pieces). On 01/07/2022 10 items are sold and on 22/07/2022 2 items are sold.

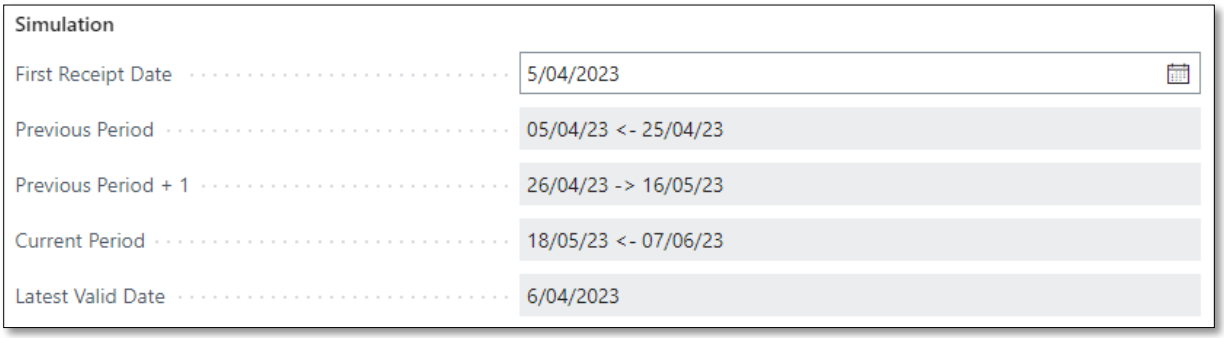


As can be seen in the simulation, the previous period + 1 has shifted from "08/06/2022 -> 28/06/2022" to "21/07/2022 ->10/08/2022". The proposed quantity in the purchase proposition for the item is 2. Since 10 was the highest number that has been sold in one of the periods and there are still 8 in stock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

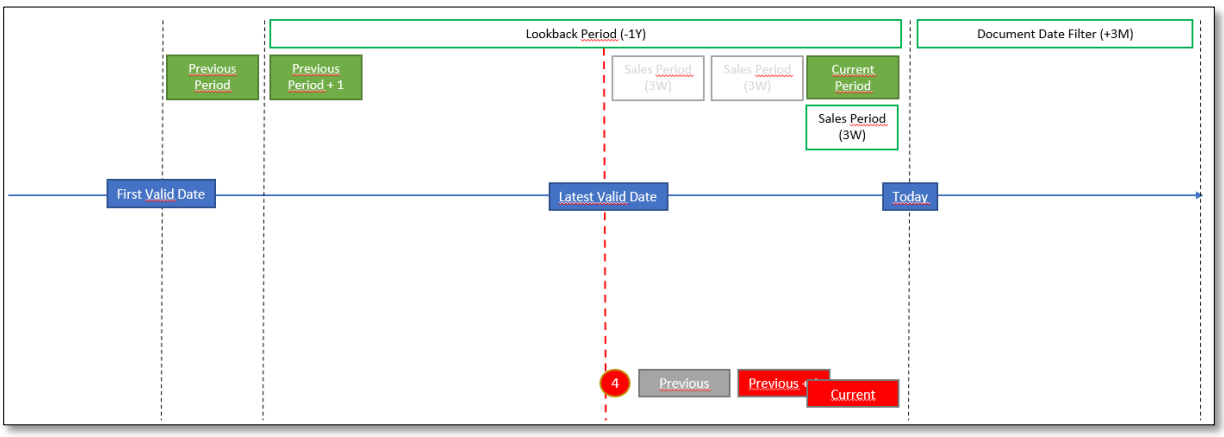


Example given: the first receipt date of the item is 05/04/2023 (20 pieces). This first receipt date is just before the Latest Valid Date 06/04/2023.
To calculate the proposed quantity for this item, the following periods will be used:

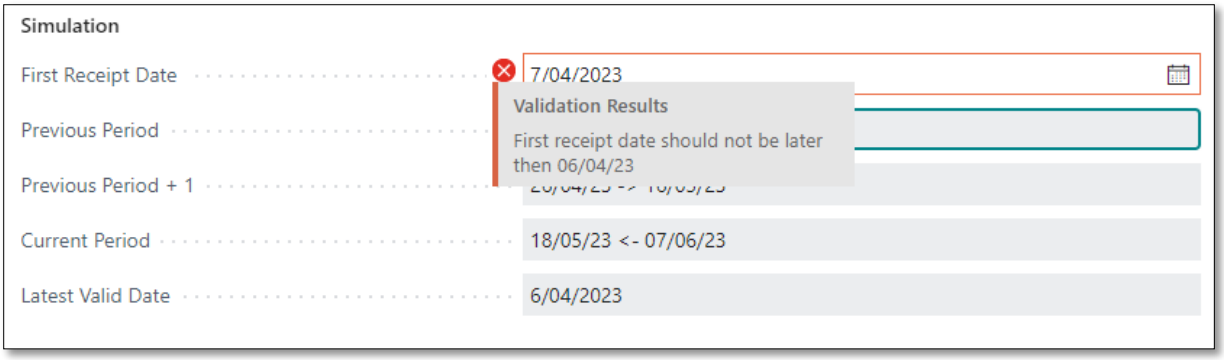


We sell 9 pieces of this item on 14/04/2023, and we have an unsent sales order of two pieces on 27/04/2023 and a sales order of one piece on 28/04.
Because the highest number of sales is 9 (in the current period), the current stock is 10, of which 2 are reserved, so the available stock is 8, the proposed 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:



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 fount with a notification and indication in the form of a red sphere "First receipt date is outside the periods".

38.1.3 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.

38.1.4 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.

38.2 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.

38.2.1 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.

38.2.2 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.

38.2.3 Requisition/Planning Worksheet tab

In this tab you can set how the calculated lines in the order proposal should be pushed to the requisition or planning worksheet. Depending on the type of the selected worksheet template name, the lines will be transferred to the planning worksheet or the requisition worksheet.

1. **Worksheet Template Name**
   Specifies the template name of the requisition/planning worksheet.
2. **Journal Batch Name**
   Specifies the journal batch name of the requisition/planning worksheet.

38.3 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 or planning Worksheet, use action **Transfer to Worksheet**.
   After transferring the lines from the order proposal, they will be removed from the order proposal. *As long as the proposals have not been pushed into the worksheet, when the order proposal is recalculated, the line(s) will also be reinstated as a proposal.*
6. To delete **all lines** in the purchase proposition, use the action **Delete all lines in worksheet**. This will delete all lines that are currently displayed in the worksheet.

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.

38.4 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 Adjm.
        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****.*

39 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.

Remark: *when using lot numbers in the inventory orders, make sure that the feature flag* ***Feature Update: Enable use of package tracking in physical inventory orders*** *is enabled in the* ***Feature Management*** *of the environment.*

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.

40 Phys. Inv. recording – take over expected quantity

When making a new Physical Inventory Recording, the option **Take over Expected Qty.** is added.

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.
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. **Take over Qty. Expected**
    Specifies if the value of the expected quantity from the order line should be copied to quantity of the recording line.
9. When the option **Take over Qty.** expected was enabled on the report page, the quantity on the lines of the recording will be filled in with the expected quantity value that was calculated on the phys. order.

41 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.

42 Second unit of measure – Inventory Journal

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

1. Choose the search icon, enter **Warehouse 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.

43 Second unit of measure – Warehouse Physical Inventory Journal

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

5. Choose the search icon, enter **Physical Inventory Journals**, then choose the related link.
6. Choose the action **Calculate Inventory…** which can be found when choosing **Prepare** in the actions bar.
7. 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.
8. 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.

44 Second unit of measure – Item Availability by Lot No.

On the Pages **Item Availability By Periods** and **Item Availability By Lot No.** it is also possible to view the availability of an item by Purchase Unit of Measure or Sales Unit of Measure.
On the page, the field **Unit of Measure** is added in which the desired Unit of Measure can be selected.
Once selected, the view will be updated.

45 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.

46 Configuration Templates to create documents

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

46.1 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 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.

46.2 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, or navigate to the list page of the document that needs to be created, choose the arrow next to New and select **New from Template**.
2. On the next page that is shown, fill in the necessary fields in order to create the document.
    a. **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**.*
    b. **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.
    c. **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.)*
    d. **Sell-to Customer Name**
    Displays the name of the selected Sell-to Customer Number.
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.

47 Customer/Vendor Template Lines

It is possible to create customer and Vendor templates. On these templates, the possibility to add Template Lines is added By Dynavision Trade.
These can be used to add some default values to the template when it is used.

1. Choose the search icon, enter **Customer Template** or **Vendor Template**, then choose the related link.
2. Open the template for which the lines need to be added.
3. In the section **Template Lines**, select the fields that need to be added to the template with a default value.
    i. **Field Name / Caption**
    Select the field that needs to be filled in on the Customer or Vendor with a certain default value.
    ii. **Default Value**
    Specifies the default value that will be inserted in the chosen field on the line.
    iii. **Skip Relation Check**
    Specifies that the relationship between the table fields should not be checked.
    This can useful when a value needs to be specified for a field that is not yet available.
    Example given, to specify a value for a Discount Group 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.
    iv. **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.

Remark: *When a customer or Vendor Template is copied, these lines will also be copied. Make sure that only the lines that are wanted on the new template are retained by deleting or inserting the necessary fields.*

48 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.*

48.1 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.

49 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.

Remark: *the empty product No. check will also be performed on Discount lines.*

50 Price list lines when deleting item UOM

When there are price list lines defined for a UOM for an item, and the UOM is deleted for this item, the price list lines will be deleted.
This deletion will also be applied on the price worksheet.

51 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).

51.1 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.*

52 Requisition/planning worksheet enhancements

52.1 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.

52.2 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.

52.3 Date formulas on requisition/planning worksheet

In Trade, the possibility to specify the starting date value and ending date value using date formulas is added. This makes it possible to specify a formula that will prefill the starting and ending date on the report page when the action **Calculate Plan** is executed on the requisition worksheet.

1. Navigate to the page **Requisition Worksheet Templates**.
2. Select the template for which the date formulas need to be configured.
3. Choose the action **Requisition Worksheet Names**.
4. Specify the date formulas for the worksheet names for which the date formulas need to be used in the calculate plan report.
    a. **Calculate Plan Starting Date Formula**
    Specifies the date formula to default the calculate plan starting date.
    b. **Calculate Plan Ending Date Formula**
    Specifies the date formula to default the calculate plan ending date.

After configuring the date formulas, when executing the action **Calculate Plan** on the **Requisition Worksheet** using the template and name for which the formulas are set, the starting and ending date will be calculated and filled in on the report page.

52.4 Calculate Plan - Exclude Manual Lines

When lines are created in the requisition worksheet, by transferring scanned requisition lines, these line get an indication that they are "Manually" created lines.
For these lines, it is also indicated which user created the lines in the field **RequesterID**.
This will make it more easy when generating the other requisition lines in the requisition worksheet to exclude lines for which a "manually" created entry already exists in the requisition worksheet.

1. Navigate to the **Requisition Worksheet**.
2. If there are scanned lines that were transferred to the requisition worksheet, these will be indicated as **Manual.**
    a. Using Personalization, it is possible to add an icon to the lines, to make the manual entries more visual.
    b. Using Personalization, it is possible to add the field **Requester ID** to the lines, to view who created the scanned lines in the worksheet.
3. When executing the action **Calculate Plan**, it is now possible to only create worksheet lines for item and location combinations that are not already "manually" generated in the worksheet.
    a. **Exclude Manual Lines**
    Specifies if the calculation will be skipped for item/ location/ variant combinations if manual lines are available.

52.5 Suggest Blanket Order on Requisition Worksheet

It is made possible to make Business Central suggest the linking of Blanket purchase orders for requisition lines.
In the Trade Setup, an option is added that can be enabled, in order to use Blanket Purchase orders for requisition lines, instead of creating a new purchase order. When the option is enabled, when using the action **Calculate Plan,** or adding lines **manually** to the requisition worksheet, the Blanket order that is created for the vendor for the item (and location) will be suggested.
Remark: *the blanket order will only be suggested in case the outstanding qty on the blanket order is higher than the requisition line quantity.*

52.5.1 Trade Setup

1. Choose the search icon, enter **Trade Setup**, then choose the related link.
2. In the Tab **requisition**, The option **Suggest blanket order (requisition)** is added.
    a. **Enable** the option to make Business Central suggest a blanket order line on the requisition lines.

52.5.2 Usage on requisition worksheet

1. Navigate to the **Requisition Worksheet**.
2. Choose the action **Calculate Plan..** or **Manually add a line** to the worksheet.
3. Select if necessary the vendor from which the item needs to be purchased.
    a. The Blanket Purchase order no. will be filled in for the line, when a match is found for the selected item, location and vendor.

53 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.

54Transfer 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.

55 Trade and Planning and Dispatch

55.1 Register multiple payments on transport trip line

It is possible to register multiple payment methods on a transport trip line, using the action **Payment Methods..**
The action will open a screen, showing the source document from which the transport trip line is created. On this document, the **Payment Methods** can be added or edited.
This will immediately be saved on the source document (sales order).

55.2 Reserved quantity on outbound whse. request lines

When Planning and Dispatch is installed in the environment, there is an option to create outbound request lines for documents for certain locations.
Trade added the functionality to quickly view the reservation entries for a selected outbound warehouse request line in the factbox pane.
The details factbox shows the **Reserved Quantity** for lines that originate from purchase, sales, service or transfer documents.
When clicking on the reserved quantity value in the factbox, the list of reservation entries is opened.

55.3 Information on inbound lines

55.3.1 Transfer-from and ship from information

On the **Inbound Warehouse Request Lines** there is a field added that can be used for filtering based on the transfer-from location. This field is by default hidden on the page, and can be added through personalization.
The fields will only be filled in for lines that are created for **Transfer orders**. For other lines, the information will remain empty.
The fields that can be added with this information are the **Ship-to / Transfer fields**.

56 "Completely received/shipped" and "Create back order" on purchase/sales order/lines

On the Purchase order and Sales order and lines, 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.
   Empty purchase/sales lines will be removed from the order. This is only possible if there is no open warehouse document for these lines. If there are open lines, an error will be displayed.
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.

57 Field warehouse receipts/shipments

On the Purchase and sales orders, sales return orders and transfer order pages, the field **Warehouse Receipts** and/or **Warehouse Shipments** is added (*to the header)* to quickly see if the document has any pending warehouse receipts and/or warehouse shipments.
The number in the field can be selected. This will open either the list of warehouse documents, if there are multiple, or the warehouse document immediately if there is only one warehouse document linked.

58 "Auto explode BOM" on Sales/purchase lines

On the Item Card, an option has been added to automatically explode the BOM of the item on sales and/or purchase 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 one of following options:

1. Disabled,
2. Sales Lines,
3. Purchase Lines, or
4. Sales & Purchase Lines.

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

On the documents, 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.

Remarks:

- *When the action **Update Document** is used, the auto-explode BOM option will also be applied when enabled in the Update Document Setup.*
- *When adding recurring lines on the document for which the auto explode is enabled, the functionality will also be executed when the items are added to the documents.*

59 Additional user settings

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

59.1 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.
    Remark: *the default line type that is set up in either the Sales & Receivables setup or the trade user setup, this will always be added in the newly created lines. The standard Business Central behavior to take over the type of the line above will not be followed if there is a type selected in either setup.*
    c. **Default Quantity on 1 (Sales)**
    Specifies if the quantity will be set to 1 for new sales lines.
    d. **Show PDF (Sales)**
    Specifies if the section **PDF** must be visible on sales documents, showing (the first) PDF if one is added as attachment to the document.
    e. **Default Document Template (Sales)**
    Specifies the Document Template that will be suggested by default when creating a sales document using a template.
    This can be defined per user or globally for all users. The per user template takes precedence over the template assigned for all users.
    f. **Default Line Type (purchase)**
    Set up a default line type for new purchase lines. When empty, the settings from the Sales & Receivables Setup will be applied instead.
    Remark: *the default line type that is set up in either the Sales & Receivables Setup or the trade user setup, this will always be added in the newly created lines. The standard Business Central behavior to take over the type of the line above will not be followed if there is a type selected in either setup.*
    g. **Show PDF (Sales)**
    Specifies if the section **PDF** must be visible on sales documents, showing (the first) PDF if one is added as attachment to the document.

h. **Default Document Template (Purchase)**
Specifies the Document Template that will be suggested by default when creating a purchase document using a template.
This can be defined per user or globally for all users. The per user template takes precedence over the template assigned for all users.

i. **Default Document Template (Transfer)**
Specifies the Document Template that will be suggested by default when creating a transfer document using a template.
This can be defined per user or globally for all users. The per user template takes precedence over the template assigned for all users.

60 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.

61 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.

62 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.
On the sales and purchase documents, the vendor or customer dynamic fields can also made visible by making the factboxes visible.

62.1 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.*

63 Reusable Packaging Price List

The Trade module makes it possible to administer the prices of Reusable Packaging items trough 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, withouth 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 seperatly on labels that can be printed for the item.

64 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.
         When the recipient is set up for a specific vendor or customer, this option cannot be selected.
         Recipients are attached using the email relations. If a relation of type customer / vendor is added, the document context to deduct the salesperson/purchase is unknown.
   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.
e. **Source Type**
   Specifies if the set up recipient needs to be added to all email scenario's, or only to these for a specific vendor or customer.
f. **Source No.**
   Specifies the customer or vendor number if the email recipient is set up for a specific customer or vendor.
g. **Source Name**
   Displays the name of the selected customer or vendor.

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, depending on the setup of the source type.

Remark: *on the* ***Vendor*** *and* ***Customer*** *cards, there is also an action added to open the email recipients. This page shows a filtered view for all the set up recipients for the selected customer or vendor.*

There are also actions added on the ***Trade Setup*** *page, to quickly navigate to the email configurations.*

65 Email body layout depending on language

It is now possible to configure email bodies for different languages.

Remarks:
This feature currently only works on BC28.0 environments or higher, for sales and purchase documents only.
The feature is not integrated on document layouts for customers or vendor custom report selections.

65.1 Setup

65.1.1 Custom Report Layouts

Before BC28, this feature required the use of custom report layouts. This has moved to the standard Business Central Report Layouts functionality.
If there were custom report layouts setup, they need to be converted to System Layouts using the functionality provided by standard Business Central.

1. Choose the search icon, enter **Custom Report Layouts** and choose the related link.
2. Select the reports that need to be migrated.
3. Choose the action **Migrate to System Layouts**, which can be found under **Actions**.
4. The Custom Report Layouts are now visible in the **Report Layouts** page, and can be selected to be used as the Email Body Layout.

More information can be found via this link: Migrate Custom Report Layouts for emails to Report Layouts.

65.1.2 Report Layouts

1. Choose the search icon, enter **Report Layouts** and choose the related link.
    a. *If the custom reports were migrated, they will now be displayed in this list.*
2. Add the Report ID for which the Multilanguage email body needs to be set, and add the line for each language that needs to be supported.
    a. Import the email body word document with the email body that needs to be added in the mail when sending the document in the language.
    b. It is advised to also add a report without language code. This can be used as fallback in case no layout was found for a particular language.
3. Select the reports that were just added, and are currently status Draft. Choose the action **Actions** > **Layout Status** > **Set Approved**.

65.1.3 Report selection – sales/purchase

1. Choose the search icon, enter **Report Selection – Sales** or **Report Selection - purchase** and choose the related link.
2. Select the **Usage** for which the email needs to be set per language.
   *Make sure the field **Email Body Layout** is empty for the selected report ID.*
3. Either choose the action **Email Body Layouts** of select the value in the field **Email Body Layouts.**
4. Add a line for each language that was set up in the custom report layouts. Also add one for the default layout without the selection of the **Language Code.**
   a. Select for each line the correct **Language Code** and select the **Report layout** that was set up in the field **Email Body Layout**.
5. After adding the wanted languages, close the page. The field **Email Body Layouts** now contains the number of custom reports set.

66 Select Document Layout for print/mail

It is possible to set up different **Document Layouts** for customers or vendors, for different document types, that are preferred to print or send to a customer or vendor.
It is possible to add different custom report layouts for the same usage for the customer or vendor.

1. This functionality can be enabled in the **Trade User Setup**.
   Choose the search icon, enter **Trade User Setup** and choose the related link.
2. The option **Select Document Layout** is added.
   a. **Enabled**
      When this option is enabled, it will be possible to specify the document layout that needs to be printed or mailed. This only applies when there are multiple layouts configured for the customer for the report that needs to be printed or mailed.
   b. **Disabled**
      When this is disabled, it will not be possible to select the document layout to be printed or mailed, and the standard Business Central selection of the document that will be printed or mailed is used.
3. Navigate to a **Customer** or **Vendor** and choose **Document Layouts**.
4. Set up the different layouts for the customer or vendor.
5. Print or mail the document, the selection screen will open when there are multiple layouts specified for the document.

Tip: *Dynavision Layouts adds the possibility to create different versions of documents, so this functionality makes it possible to set up different versions for the customer or vendor from a report, from which can be selected when printing or mailing the layout to the customer or vendor.*

67 Barcode support – Scan lines

When Business Central is opened on a mobile device, it is possible to scan barcodes to add items to a requisition worksheet, sales document, purchase document or transfer order.
Make sure that the **Update Document Setup** is set up correctly to add all the information to the order when scanning lines.

67.1 Setup

67.1.1 Configuration Templates

Set up the worksheet template name, location code and journal batch name, to use in transferring the scanned lines to a document 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.

67.1.2 Trade user setup – Requisition worksheet Template

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.
There is also a new setting added **Maximum Qty (Scanned Requisition Line)**. This specifies the maximum quantity that can be entered for lines in the scan requisition line page. If an invalid value is scanned in this field, a beep sound is played and the quantity field gains focus or re-enter a valid quantity.

67.2 Usage – requisition worksheet

The scan functionality can be used trough 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.
      In this field, an item can also be searched manually, if no barcode is available.
   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.

67.3 Scan lines on purchase, sales or trade documents

It is possible to scan items and add these to purchase quotes/orders; sales quotes/orders/invoices or transfer orders.
This can be done by creating a document using a template, or by creating the document and using the added functionality to add the scanned lines to the document.

67.3.1 Create document using template

The document can be created using a template that is defined in Business Central.
In this manual, the scanning of lines on the sales document will be described, the same steps need to be taken for the purchase or transfer documents.

1. Choose the search icon, enter **Scan Sales Lines**, then choose the related link.
    a. ***Remark:*** *for the purchase documents, use* ***Scan Purchase Lines****, for transfer orders, use* ***Scan Transfer Lines****.*
2. In the page that opens, select the desired options for the document to be created. Choose **OK** to continue.
    a. If a template is selected, for which certain fields are set up that are noted on the Create Document from Template page, the fields will be filled with the value from the selected template.
    b. If the value is changed on the Create Document from Template page, this will be added on the document, instead of the template field. (Fields selected on the page take precedence.)
3. The **Scan Lines** page opens for the created document. Scan the barcode or select the item number and specify the other parameters for the item to be added to the document. Scan all items that need to be added on the page (without choosing ok).
4. Once all items have been scanned, choose **OK**.
5. The document will be created, with the scanned items on the lines.

67.3.2 Scan Lines on document

If a document is created, it is also possible to add lines by scanning.

1. Navigate to the document on which the lines need to be scanned.
2. Choose the action **Scan Lines…**
3. The page opens in which the items can be scanned.
4. Scan all items and choose **OK** to close the page.
5. The items are added to the document.

68 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.

68.1 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. Suntory
    d. Haacht,
    e. Generic Vendor reporting,
    f. Coca Cola, or
    g. Coca Cola Purchase commitment.
4. *Remark: the fields of the Message Type card are described in the Dynavision Connect manual.*

68.2 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.

68.2.1 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.*

68.2.2 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.*

68.2.3 Generic vendor reporting

A Generic vendor reporting can be used to export posted sales invoices and posted sales credit memos to excel, with a wholesale name specified and the possibility of naming the worksheet in this export.

1. On the **Message Type Card**, select **Format Generic Vendor reporting**.
2. Once the option is selected, there will be **Extra Settings** visible on the Message Type Card.
    a. **Wholesaler Name**
    Specifies the wholesaler name for the report.
    b. **Worksheet Name**
    Specifies the name that will be given to the worksheet in the exported excel.

68.2.4 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.
    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.

69 Purchase order export – Prik & Tik

69.1 Setup

When working with partner Prik & Tik, the purchase order created in Business Central for this Vendor can be exported in the xml-format.
Only items with item Type Normal will be included in the exported XML. No reusable packaging items will be included.
Navigate to **Message Types** to set up the functionality for the export.

69.1.1 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.

69.2 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.