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## K3 Pebblestone

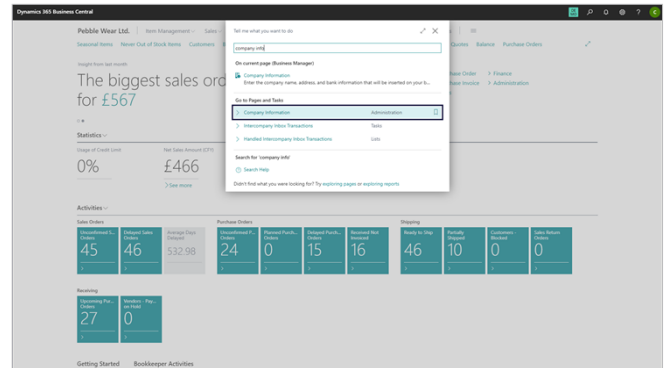
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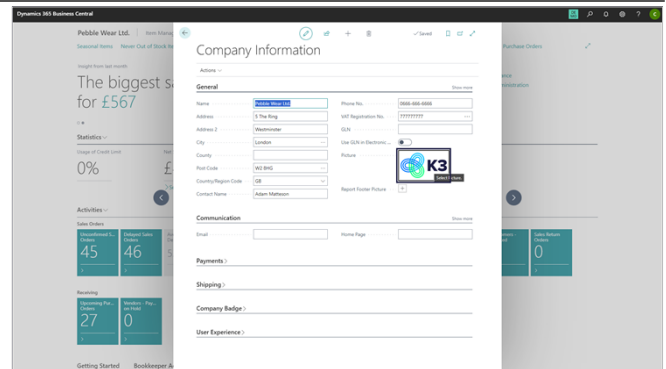
# 1. General setups

## 1.1. Company Logo and Footer BC25

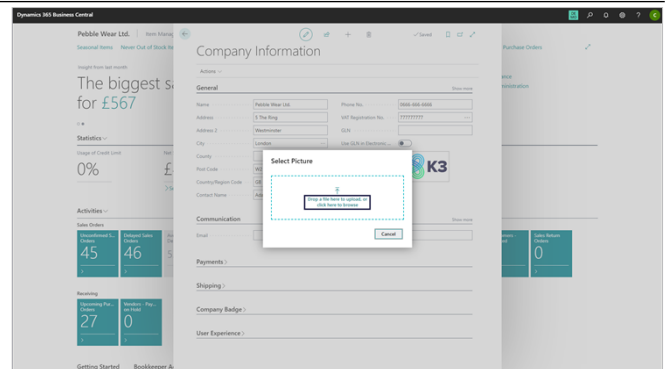
Company Information is essential for maintaining accurate business details, such as company name, address, tax information, and contact details. This information is used across the system for invoices, reports, and compliance purposes, ensuring consistency and professionalism in all communications.



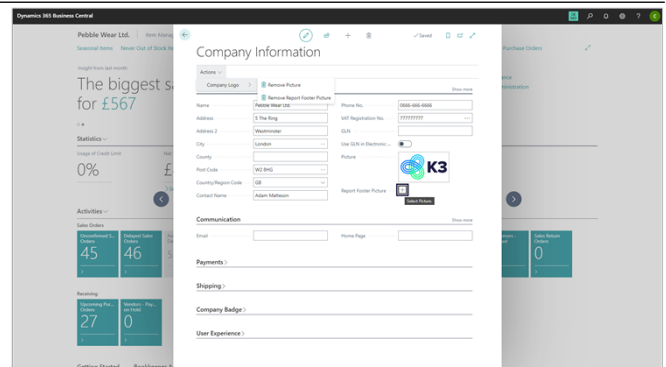
The company logo can be added by clicking the plus icon or the existing image.



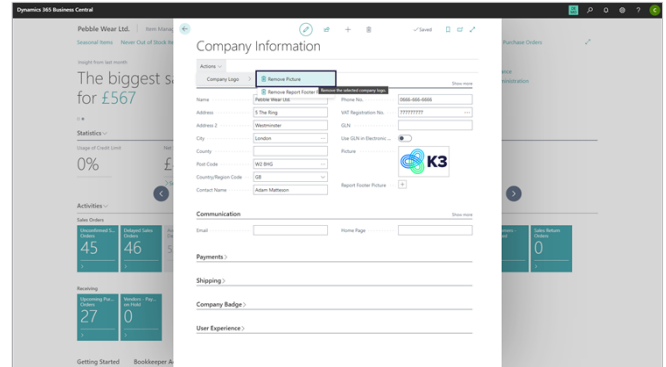
The logo image can be dropped into the field, or you can select an image by browsing for it.



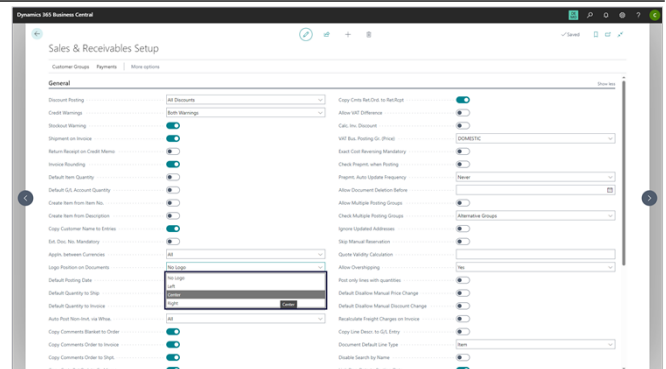
The same applies to the image used as a footer on documents.



An image can be removed by selecting Actions in the ribbon.



In the Sales & Receivables Setup, you can select Show more under the General tab. This will make the Logo Positions on Documents field visible, allowing you to fill in the logo position on documents.

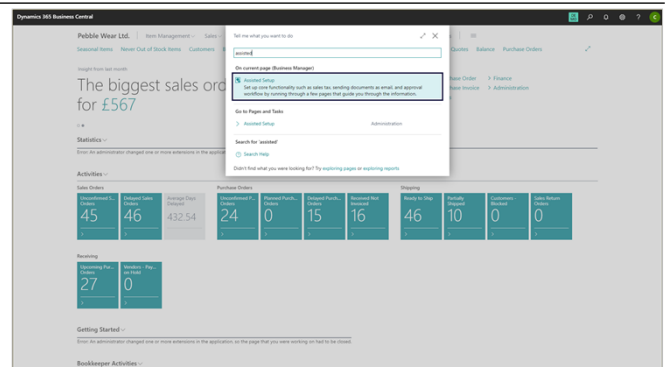


## 1.2. Assisted Setup BC25

Assisted Setup helps users configure and personalize their system step by step. It provides guided wizards for setting up key features such as finance, sales, purchasing, and integrations, making the onboarding process easier and reducing manual effort.

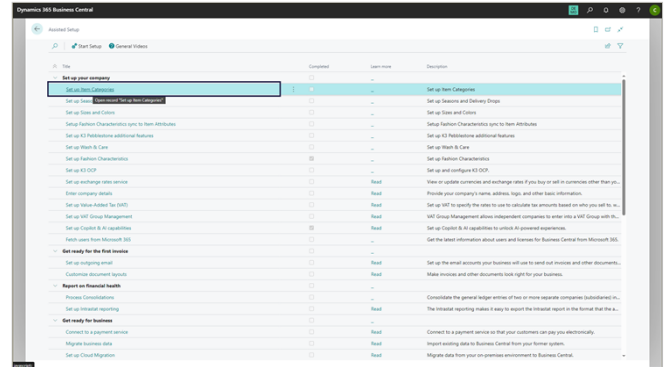


The Assisted Setup can be started by searching for it, or by selecting Assisted Setup in the settings menu in the upper right corner.

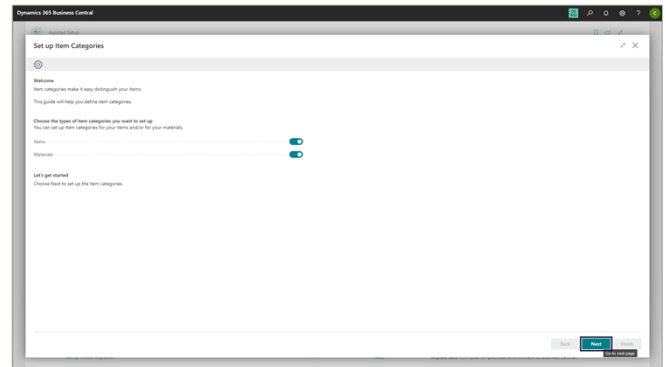


## K3 Pebblestone

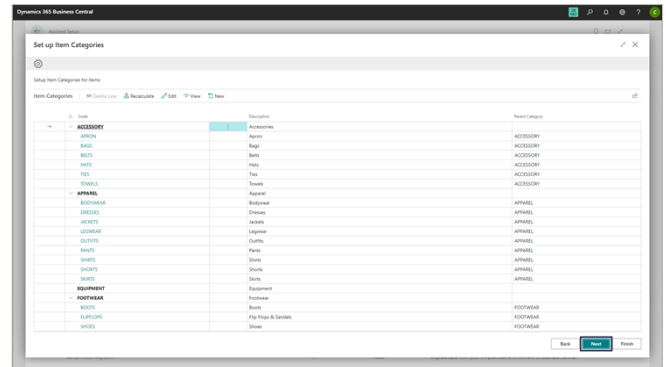
By clicking on the Set up topics from top to bottom, or by selecting one and choosing Start Setup from the ribbon, you enter a wizard that guides you through configuring the application. In this wizard, you can add, modify, or remove data, which is then directly saved in the underlying table.



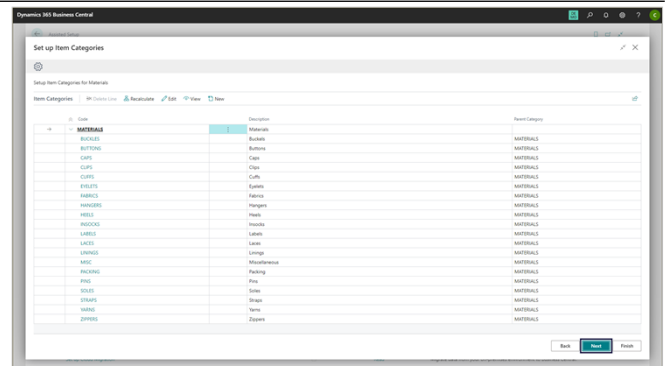
In the wizard, you can enable or disable components before proceeding to the next step.



Examples are already available. These can be modified, expanded, or removed as needed.



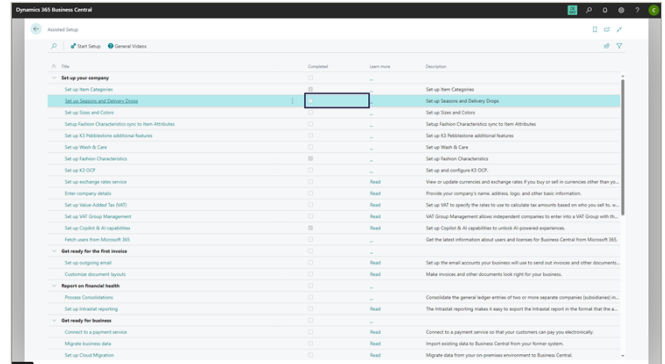
The data in the following screens can also be modified.





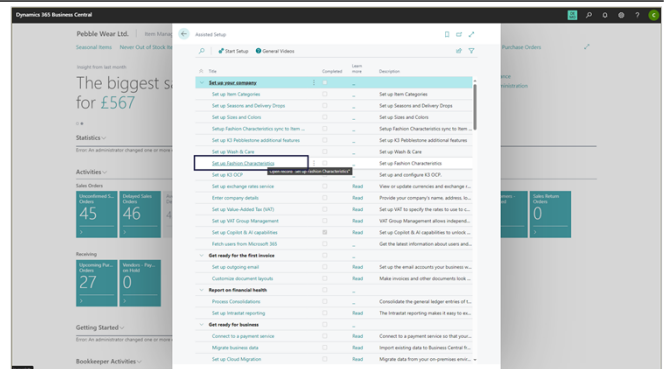
## K3 Pebblestone

Once a wizard is completed, a checkmark is placed in the Completed field in the overview.



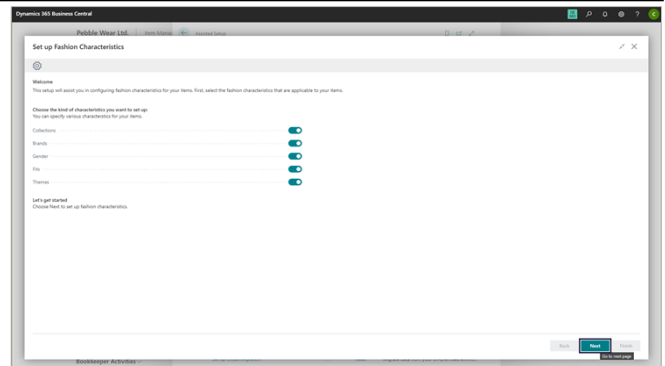
Title	Completed	Learn more	Description
<b>Set up your company</b>			
Set up Item Categories	<input checked="" type="checkbox"/>		Set up Item Categories
Set up Item Categories and Delivery Drops	<input checked="" type="checkbox"/>		Set up Item Categories and Delivery Drops
Set up Item and Colors	<input checked="" type="checkbox"/>		Set up Item and Colors
Setup Fashion Characteristics (sync to Item Attributes)	<input checked="" type="checkbox"/>		Setup Fashion Characteristics (sync to Item Attributes)
Set up K1 Pedestrian additional features	<input checked="" type="checkbox"/>		Set up K1 Pedestrian additional features
Set up Wash & Care	<input checked="" type="checkbox"/>		Set up Wash & Care
Set up Fashion Characteristics	<input checked="" type="checkbox"/>		Set up Fashion Characteristics
Set up K2 DCP	<input checked="" type="checkbox"/>		Set up and configure K2 DCP
Set up exchange rates	<input checked="" type="checkbox"/>	Read	View or update currencies and exchange rates if you buy or sell in currencies other than your...
Enter company details	<input checked="" type="checkbox"/>	Read	Provide your company's name, address, logo, and other basic information.
Set up Value Added Tax (VAT)	<input checked="" type="checkbox"/>	Read	Set up VAT to report the value added to calculate tax amounts based on what you sell for. It...
Set up VAT Group Management	<input checked="" type="checkbox"/>	Read	VAT Group Management allows independent companies to enter into a VAT Group with oth...
Set up Capital & Liabilities	<input checked="" type="checkbox"/>	Read	Set up Capital & Liabilities to unlock AI-powered experiences.
Fetch users from Microsoft 365	<input checked="" type="checkbox"/>	Read	Get the latest information about users and licenses for Business Central from Microsoft 365.
<b>Get ready for the first invoice</b>			
Set up outgoing email	<input checked="" type="checkbox"/>	Read	Set up the email accounts your business will use to send out invoices and other documents.
Customer document layout	<input checked="" type="checkbox"/>	Read	Make invoices and other documents look right for your business.
<b>Report on financial health</b>			
Process Consolidations	<input checked="" type="checkbox"/>	Read	Consolidate the general ledger entries of two or more separate companies (subsidiaries) in...
Set up financial reporting	<input checked="" type="checkbox"/>	Read	The financial reporting makes it easy to report the financial report in the format that the a...
<b>Get ready for business</b>			
Connect to a payment service	<input checked="" type="checkbox"/>	Read	Connect to a payment service so that your customers can pay you electronically.
Migrate business data	<input checked="" type="checkbox"/>	Read	Import existing data to Business Central from your former system.
Set up Cloud Migration	<input checked="" type="checkbox"/>	Read	Migrate data from your on-premise environment to Business Central.

Click on the Set up Fashion Characteristics



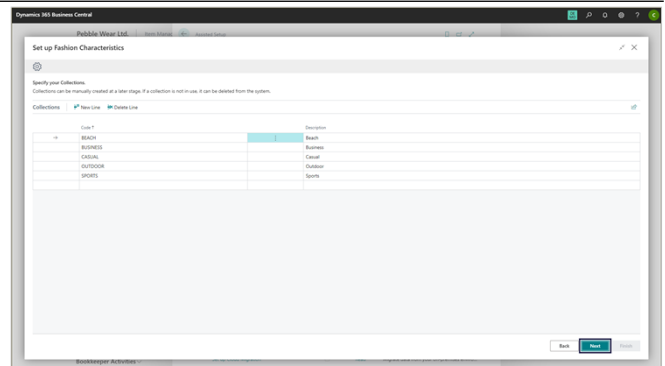
Title	Completed	Learn more	Description
<b>Set up your company</b>			
Set up Item Categories	<input checked="" type="checkbox"/>		Set up Item Categories
Set up Item Categories and Delivery Drops	<input checked="" type="checkbox"/>		Set up Item Categories and Delivery Drops
Set up Item and Colors	<input checked="" type="checkbox"/>		Set up Item and Colors
Setup Fashion Characteristics (sync to Item Attributes)	<input checked="" type="checkbox"/>		Setup Fashion Characteristics (sync to Item Attributes)
Set up K1 Pedestrian additional features	<input checked="" type="checkbox"/>		Set up K1 Pedestrian additional features
Set up Wash & Care	<input checked="" type="checkbox"/>		Set up Wash & Care
Set up Fashion Characteristics	<input checked="" type="checkbox"/>		Set up Fashion Characteristics
Set up K2 DCP	<input checked="" type="checkbox"/>		Set up and configure K2 DCP
Set up exchange rates	<input checked="" type="checkbox"/>	Read	View or update currencies and exchange rates...
Enter company details	<input checked="" type="checkbox"/>	Read	Provide your company's name, address, logo...
Set up Value Added Tax (VAT)	<input checked="" type="checkbox"/>	Read	Set up VAT to report the value added to use t...
Set up VAT Group Management	<input checked="" type="checkbox"/>	Read	VAT Group Management allows independent...
Set up Capital & Liabilities	<input checked="" type="checkbox"/>	Read	Set up Capital & Liabilities to unlock...
Fetch users from Microsoft 365	<input checked="" type="checkbox"/>	Read	Get the latest information about users and...
<b>Get ready for the first invoice</b>			
Set up outgoing email	<input checked="" type="checkbox"/>	Read	Set up the email accounts your business w...
Customer document layout	<input checked="" type="checkbox"/>	Read	Make invoices and other documents look...
<b>Report on financial health</b>			
Process Consolidations	<input checked="" type="checkbox"/>	Read	Consolidate the general ledger entries of...
Set up financial reporting	<input checked="" type="checkbox"/>	Read	The financial reporting makes it easy to r...
<b>Get ready for business</b>			
Connect to a payment service	<input checked="" type="checkbox"/>	Read	Connect to a payment service so that your...
Migrate business data	<input checked="" type="checkbox"/>	Read	Import existing data to Business Central f...
Set up Cloud Migration	<input checked="" type="checkbox"/>	Read	Migrate data from your on-premise enviro...

Select the fashion Business characteristics that are applicable to your items.



Characteristic	Toggle
Collections	<input checked="" type="checkbox"/>
Brands	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>
Fit	<input checked="" type="checkbox"/>
Themes	<input checked="" type="checkbox"/>

Once you have entered your own collections, these details are automatically saved in the table, and you can press Next.



Collection	Description
BEACH	Beach
BUSINESS	Business
CASUAL	Casual
OUTDOOR	Outdoor
SPORTS	Sports

[illegible]

Symphony 360 Business Central			
Assisted Setup			
	Part Setup	General Filters	
Step	Completed	Last seen	Description
<b>Set up your accounts</b>	1		
Set up your accounts			
Set up Bank Accounts and Delivery Digits			Set up Bank Accounts
Set up Bank and Cards			Set up Bank Accounts and Delivery Digits
Set up Bank Characteristics and Non-Attributes			Set up Bank Accounts
Set up 43 Publications additional features			Set up 43 Publications additional features
Set up Bank & Cash			Set up Bank & Cash
Set up Bank Characteristics			Set up Bank Characteristics
Set up an OGP			Set up an OGP and a DOD
Set up exchange rate service		Read	How to update currencies and exchange rates if you sell or sell in currencies other than your base currency
Provide your company's name, address, logo, and other basic information		Read	Provide your company's name, address, logo, and other basic information
Set up New Address ID (NAD)		Read	Set up NAD to verify the related tax code calculate for amounts based on where you sell or buy
Set up Group Management		Read	Set up Group Management also independent companies to enter into a 400 Group with you
Set up Customer & Accounts		Read	Set up Customer & Accounts to create an account record
Fetch data from Microsoft 365		Read	Get the user information about users and licenses from Business Central from Microsoft 365
<b>Get ready for the Real Estate</b>			
Set up company data			
Configure document layout		Read	Make updates to other documents like right for your business
<b>Prepare on financial health</b>			
Review Consolidation			Consolidate the general ledger which will allow you separate companies
Set up financial reporting		Read	The financial reporting tables will support the financial report in the format that you want
<b>Get ready for business</b>			
Connect to a payment service		Read	Connect to a payment service so that your customers can pay you electronically
Configure sales data		Read	Export existing sales to Business Central from your home system
Set up Cloud Migration		Read	Migrate data from your companies environment to Business Central

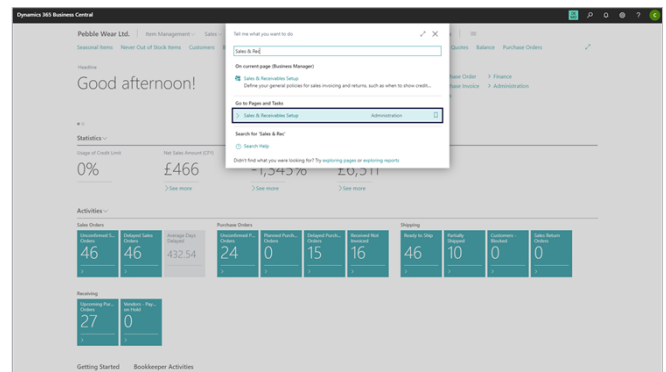


### 1.3.1. [ClickLearn]

You must define the general setup on the Sales & Receivables page, such as which sales documents are required, how their values are posted, and the type of lines to create by default. This general setup is typically performed once during the initial implementation.

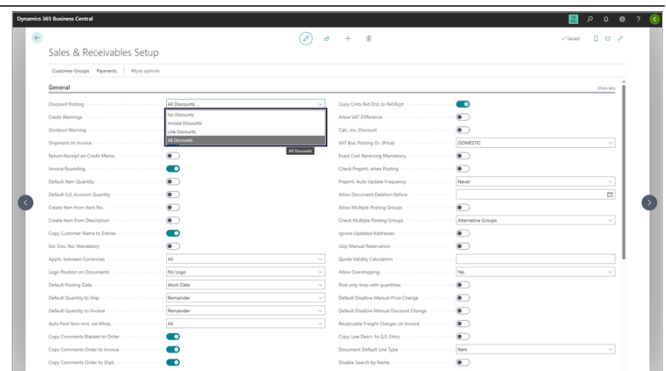


The Sales & Receivable Setup can be started by searching for it.



## Tab General

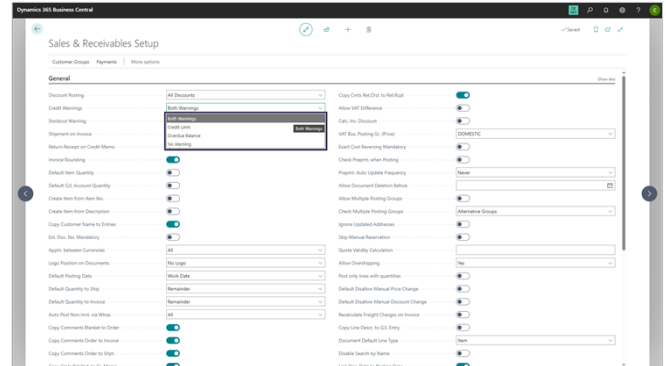
- **No Discounts:** Discounts are not posted separately but instead will subtract the discount before posting.
- **Invoice Discounts:** The invoice discount and invoice amount are posted simultaneously, based on the Sales Invoice Discount Account field in the General Posting Setup window.
- **Line Discounts:** The line discount and the invoice amount will be posted simultaneously, based on Sales Line Discount Account field in the General Posting Setup window.
- **All Discounts:** The invoice and line discounts and the invoice amount will be posted simultaneously, based on the Sales Invoice Discount Account field and Sales Line Discount Account fields in the General Posting Setup window.



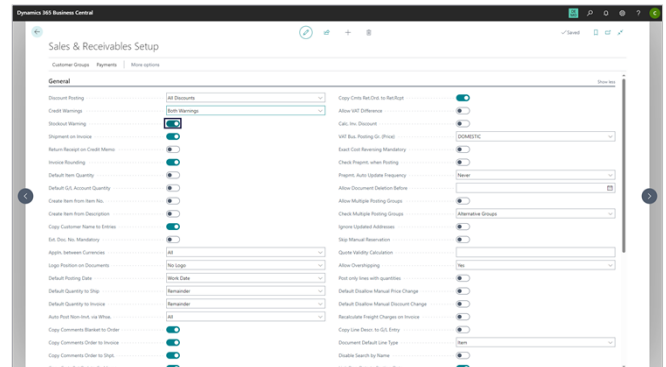


## K3 Pebblestone

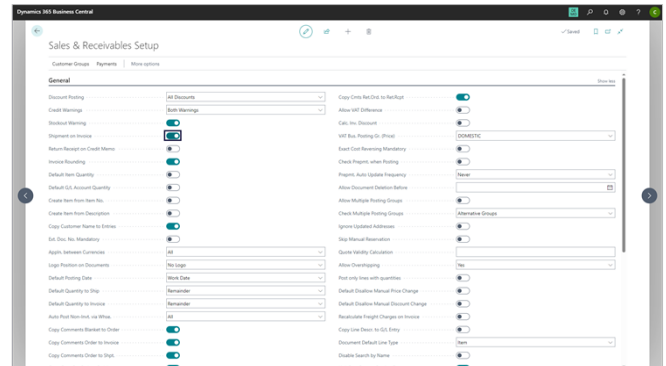
Specifies whether to warn about the customer's status when you create a sales order or invoice.



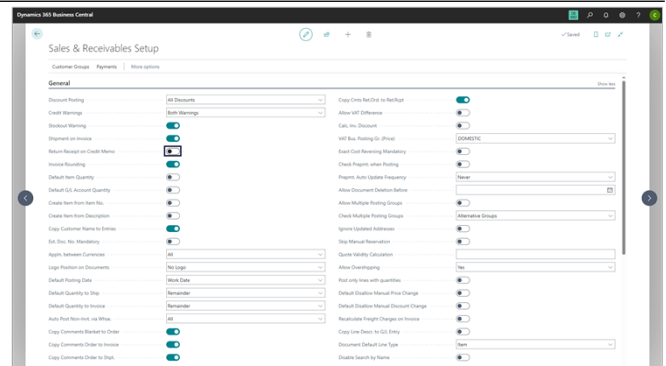
Specifies if a warning is displayed when you enter a quantity on a sales document that brings the item's inventory level below zero.



Specifies if a posted shipment and a posted invoice are automatically created when you post an invoice.

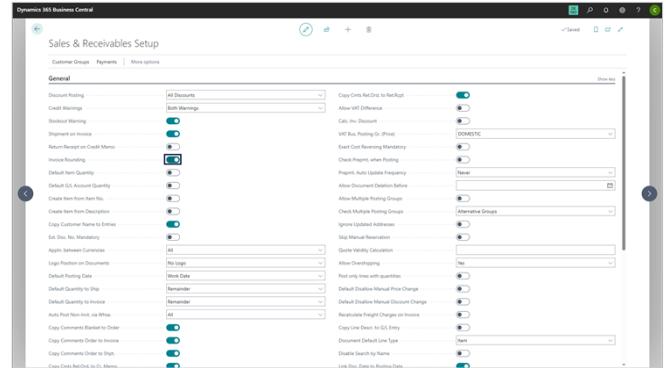


Specifies that a posted return receipt and a posted sales credit memo are automatically created when you post a credit memo.

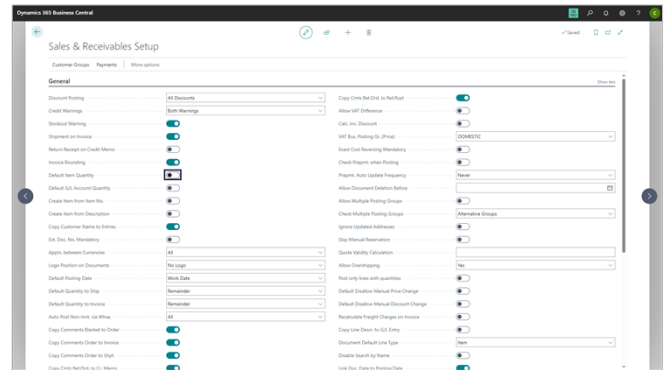


## K3 Pebblestone

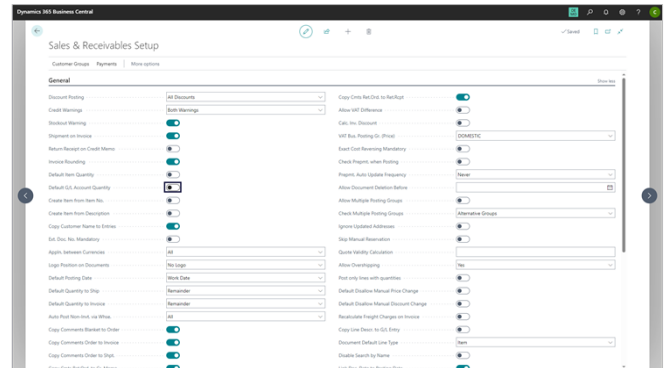
Specifies if amounts are rounded for sales invoices. Rounding is applied as specified in the Inv. Rounding Precision (LCY) field in the General Ledger Setup window.



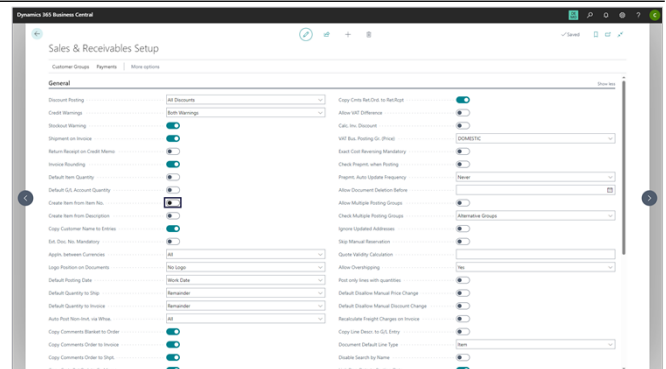
Specifies that the Quantity field is set to 1 when you fill in the Item No. field.



Specifies that Quantity is set to 1 on lines of type G/L Account.

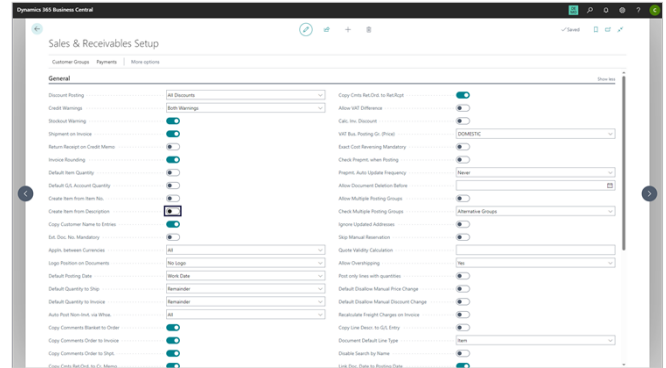


Specifies if the system will suggest to create a new item when no item matches the number that you enter in the No. Field on sales lines.

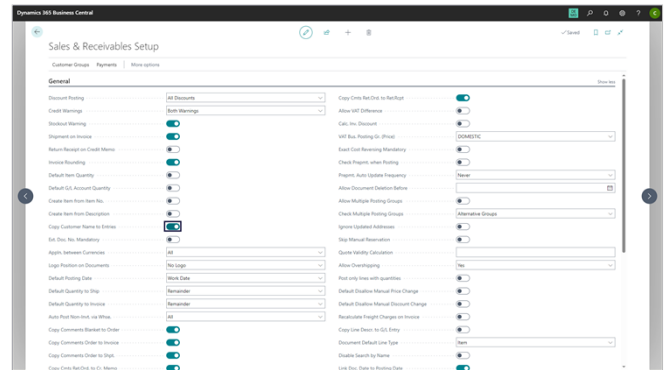


## K3 Pebblestone

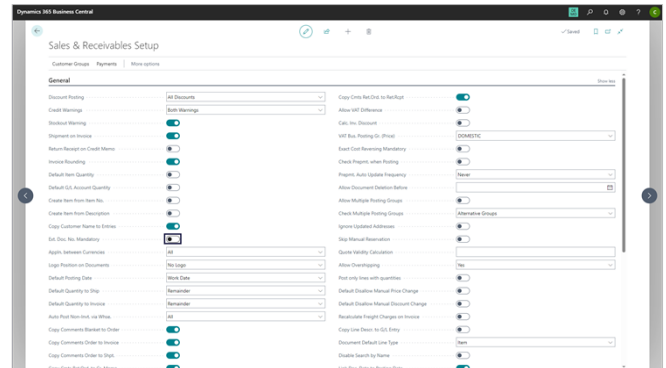
Specifies if the system will suggest to create a new item when no item matches the description that you enter in the Description field on sales lines.



Specifies if you want the name on customer cards to be copied to customer ledger entries during posting.

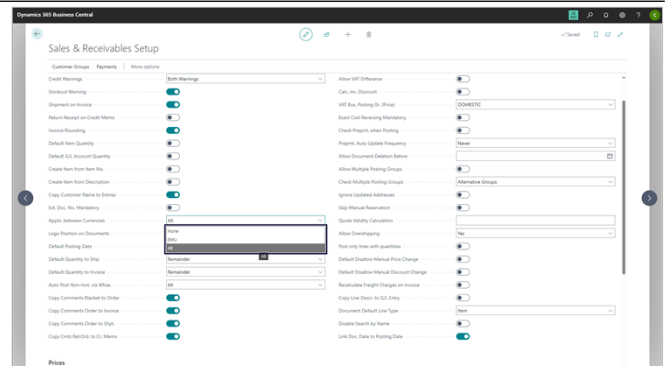


Specifies if it is mandatory to enter an external document number in the External Document No. field on a sales header or the External Document No. field on a general journal line.

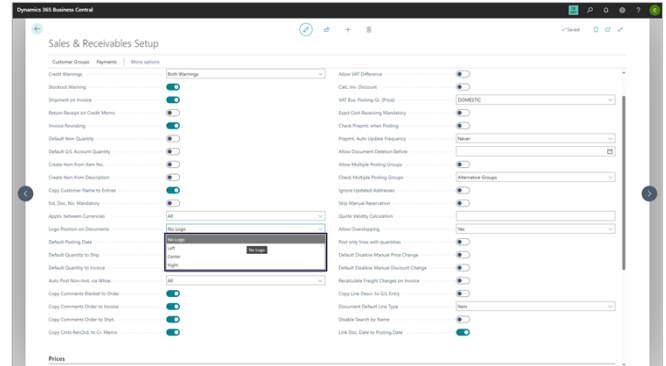


Specifies whether it is allowed to apply customer payments in different currencies.

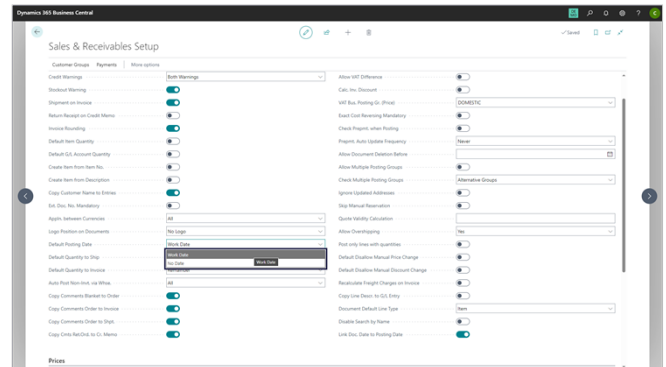
- None: All entries involved in one application must be in the same currency.
- EMU: You can apply entries in euro and one of the old national currencies (for EMU countries/regions) to one another.
- All: You can apply entries in different currencies to one another. The entries can be in any currency.



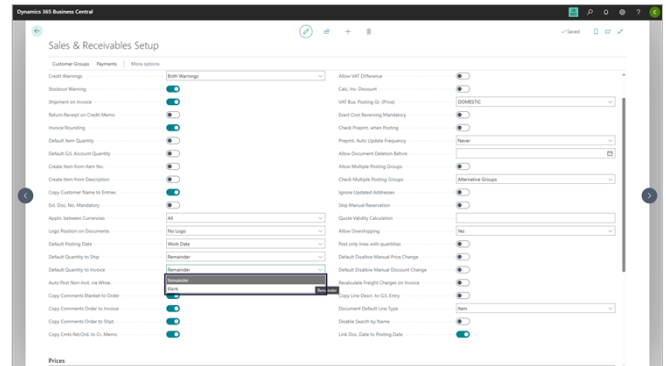
Specifies the position of your company logo on business letters and documents.



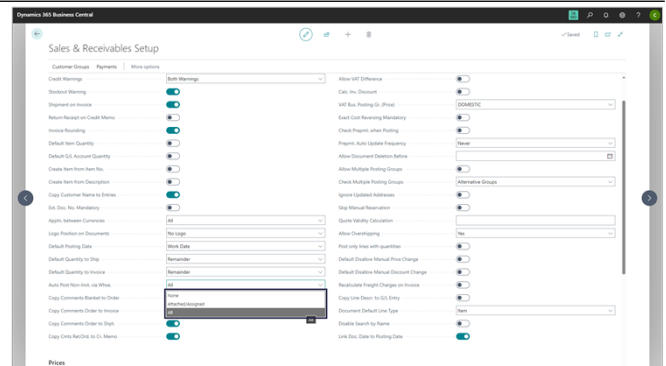
Specifies which date must be used as the default posting date on sales documents. If you select Work Date, the Posting Date field will be populated with the work date at the time of creating a new sales document. If you select No Date, the Posting Date field will be empty by default and you must manually enter a posting date before posting.



Specifies the default value for the Qty. to Invoice field on sales order lines and the Return Qty. to Invoice field on sales return order lines. If you choose Blank, the quantity to invoice is not automatically calculated.



Specifies if non-inventory item lines in a sales document will be posted automatically when the document is posted via warehouse. None: Do not automatically post non-inventory item lines. Attached/Assigned: Post item charges and other non-inventory item lines assigned or attached to regular items. All: Post all non-inventory item lines.



**Sales & Receivables Setup**

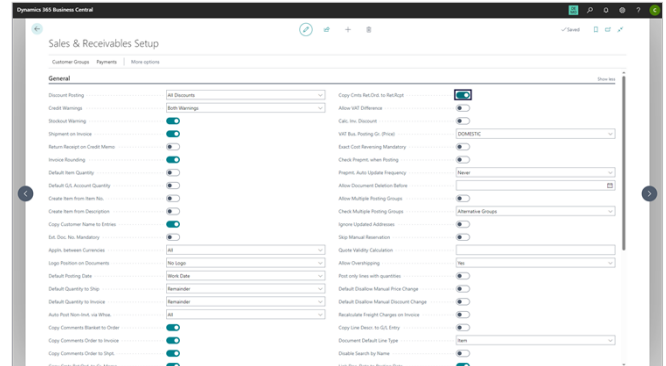
Customer Groups    Payments    Misc options

Credit Warning	Each Invoice	Allow V.I. Difference	<input type="checkbox"/>
Default Warning	<input type="checkbox"/>	Cal. Inv. Discount	<input type="checkbox"/>
Warning on In-Stock	<input checked="" type="checkbox"/>	Vol. Inv. Pricing In-Stock	<input type="checkbox"/>
Allow Receipts on Credit Items	<input checked="" type="checkbox"/>	Fixed Cost Inventory Management	<input type="checkbox"/>
Inventory Receiving	<input type="checkbox"/>	Check Prices when Posting	<input type="checkbox"/>
Default Item on Quantity	<input type="checkbox"/>	Project Auto Update Frequency	None
Allow U.S. Account Quantity	<input type="checkbox"/>	Allow Documented Sales	<input type="checkbox"/>
Country Restricted Item No.	<input type="checkbox"/>	Allow Multiple Project Issues	<input type="checkbox"/>
Close Item from Description	<input type="checkbox"/>	Check Multiple Posting Groups	<input type="checkbox"/>
Close Customer Name to Entries	<input type="checkbox"/>	Ignore Updated Invoice Sheet	<input type="checkbox"/>
Close Cr. Warranty	<input type="checkbox"/>	Stop Manual Reimbursement	<input type="checkbox"/>
Apply Item to Customers	All	Stop Vending Calculation	<input type="checkbox"/>
Stop Receipts on Reimbursements	No Input	Allow Overpayment	<input type="checkbox"/>
Default Pricing Date	First Date	Print only items with quantities	<input type="checkbox"/>
Default Quantity to Ship	Remainder	Default Estimate Manual Price Change	<input type="checkbox"/>
Default Quantity to Invoice	Remainder	Default Estimate Manual Discount Change	<input type="checkbox"/>
Automatic Item to Ship When	0	Reauthorize Payment Change on Invoice	<input type="checkbox"/>
Copy Comments Default to Invoice	<input checked="" type="checkbox"/>	Copy Line Item to S.O. Ship	<input type="checkbox"/>
Copy Comments Default to Invoice	<input type="checkbox"/>	Document Default Line Type	None
Copy Comments Order to Ship	<input type="checkbox"/>	Disable Search by Name	<input type="checkbox"/>
Copy Cost Rec'd to Cr. Items	<input checked="" type="checkbox"/>	Link Cost to Posting Date	<input checked="" type="checkbox"/>

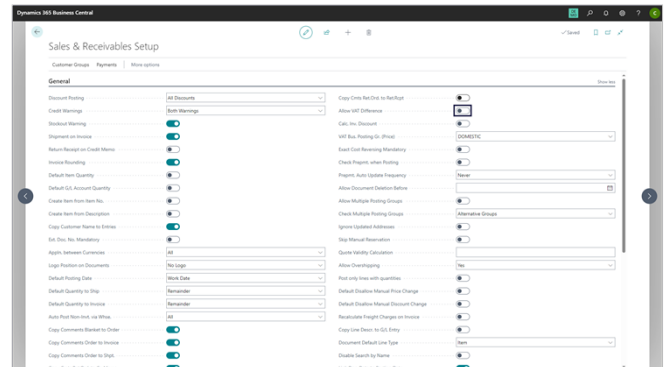
[illegible][illegible]

## K3 Pebblestone

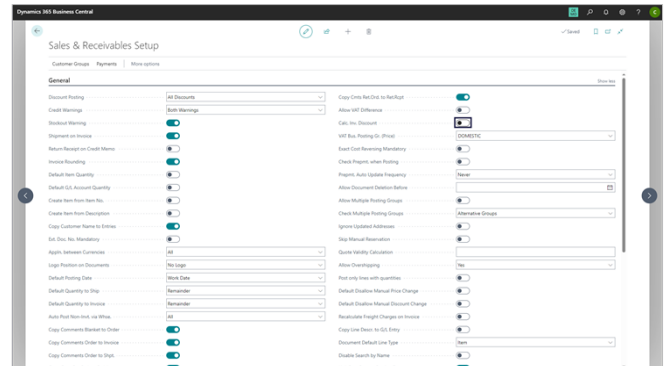
Specifies that comments are copied from the sales return order to the posted return receipt.



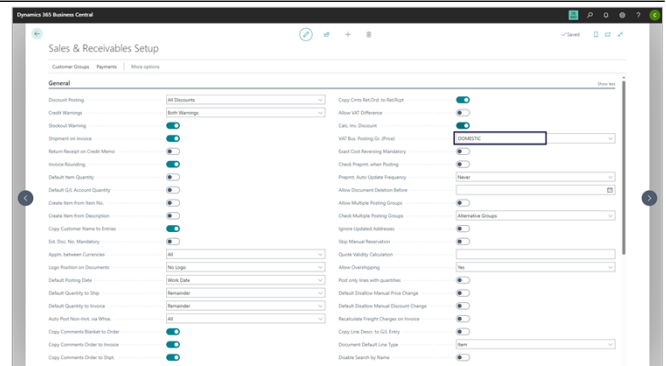
Specifies that comments are copied from the sales return order to the posted return receipt.



Specifies if the invoice discount amount is automatically calculated with sales documents. If this check box is selected, then the invoice discount amount is calculated automatically, based on sales lines where the Allow Invoice Disc. field is selected.



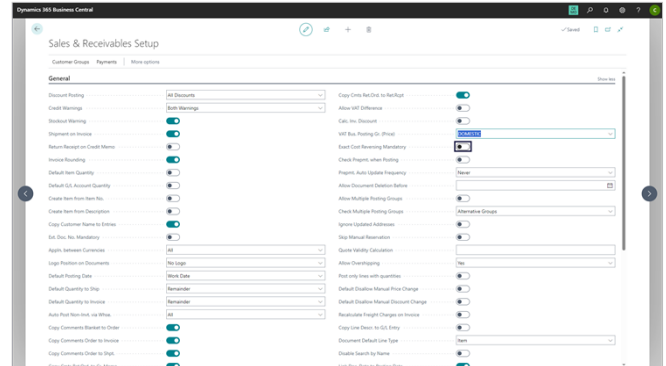
Specifies a VAT business posting group for customers for whom you want the item price including VAT to apply.



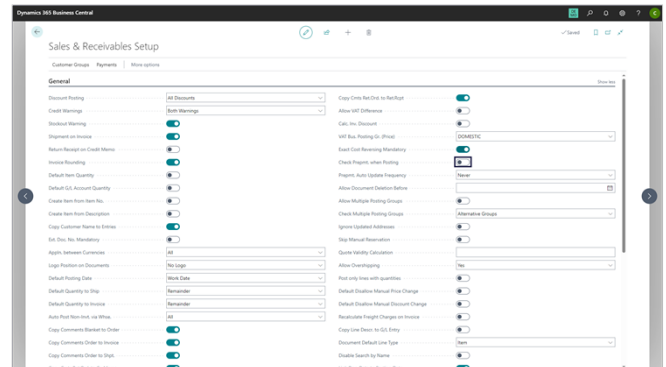


## K3 Pebblestone

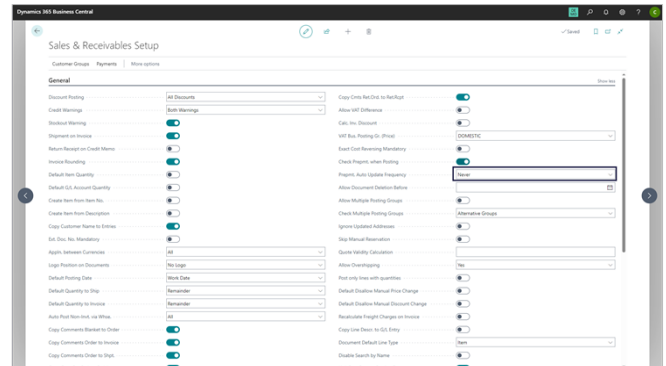
Specifies that a return transaction cannot be posted unless the Appl.-from Item Entry field on the sales order line specifies an entry.



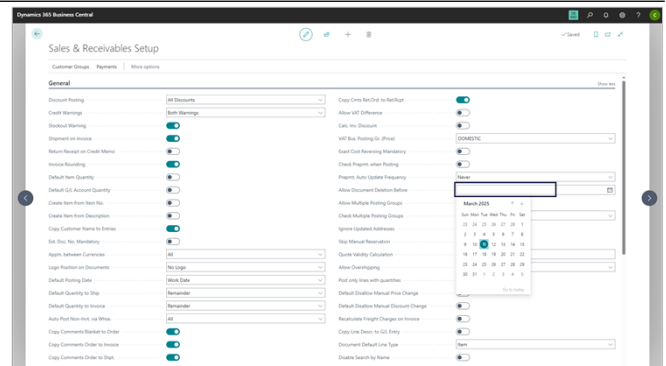
Specifies that you cannot ship or invoice an order that has an unpaid prepayment amount.



Specifies how often the job must run that automatically updates the status of orders that are pending prepayment.

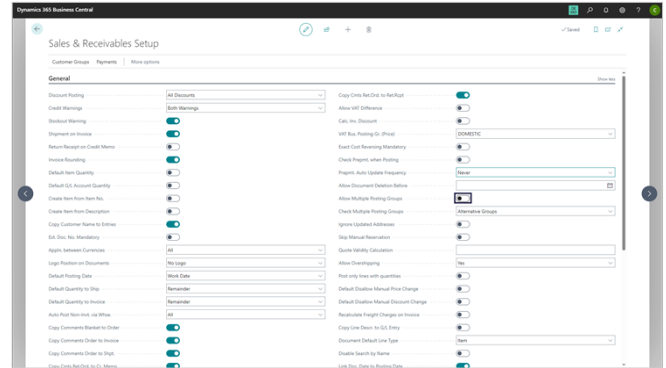


Specifies if and when posted sales invoices and credit memos can be deleted. If you enter a date, posted sales documents with a posting date on or after this date cannot be deleted.

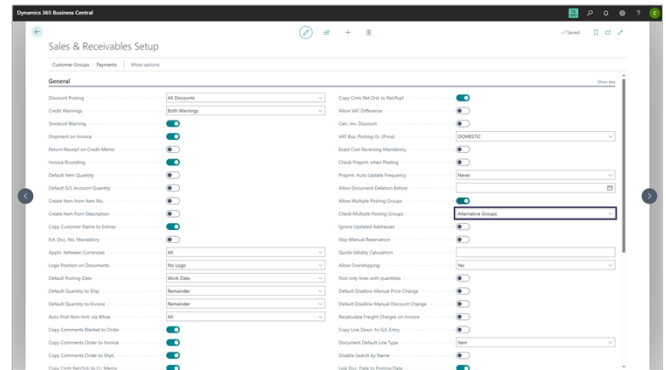


## K3 Pebblestone

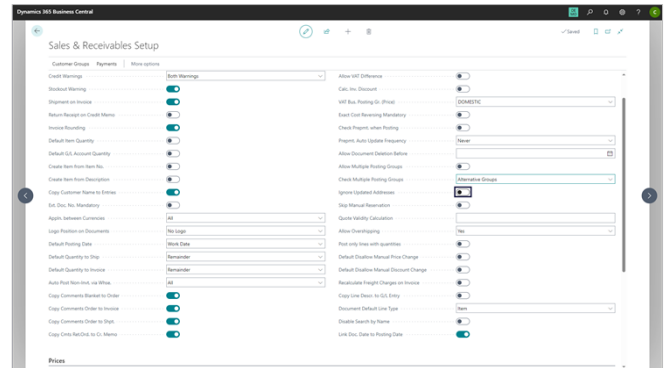
Specifies if multiple posting groups can be used for the same customer in sales documents.



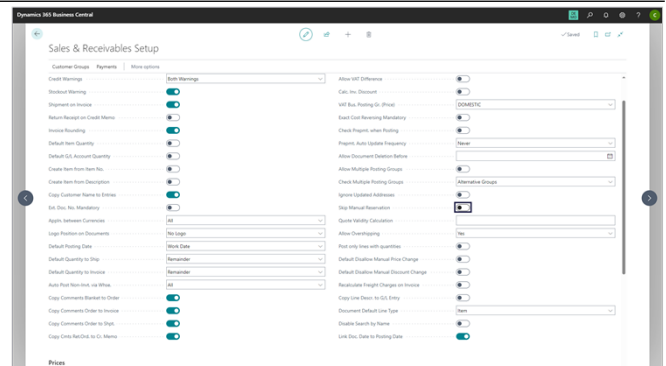
Specifies implementation method of checking which posting groups can be used for the customer.



Specifies if changes to addresses made on sales documents are copied to the customer card. By default, changes are copied to the customer card.

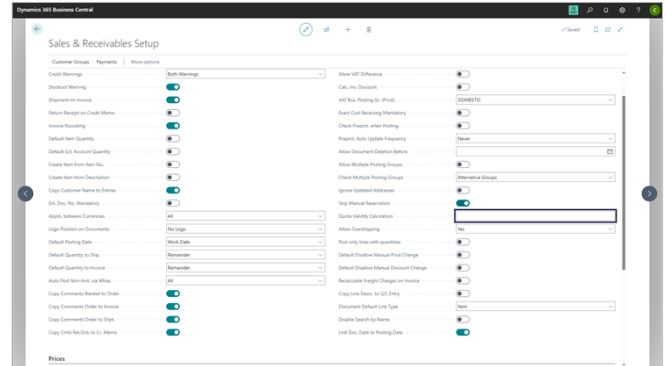


Specifies that the reservation confirmation message is not shown on sales lines. This is useful to avoid noise when you are processing many lines.

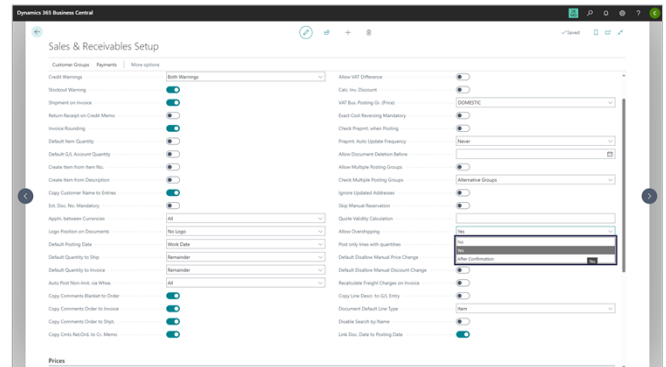


## K3 Pebblestone

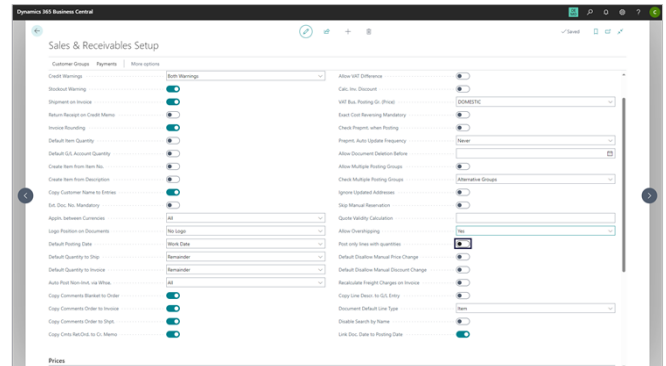
Specifies a formula that determines how to calculate the quote expiration date based on the document date.



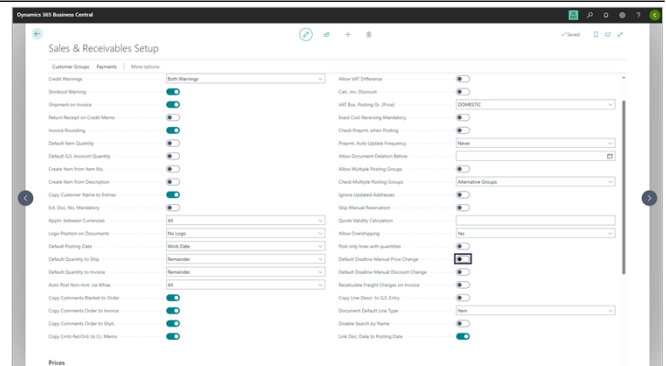
Specifies if overshipping is allowed.



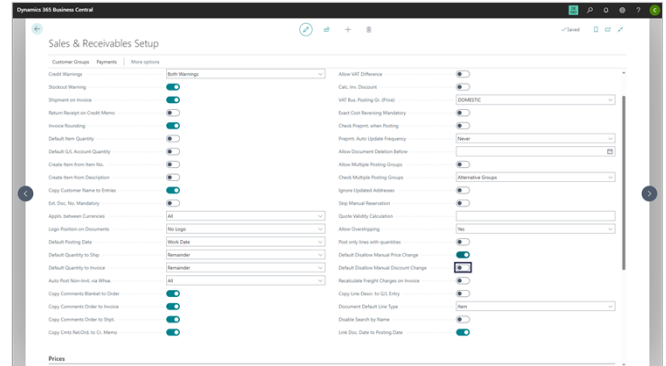
Specifies if only lines with quantities will be posted.



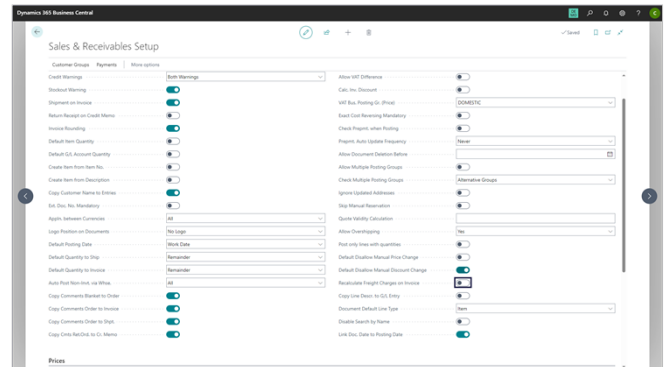
Default Disallow Manual Price Change



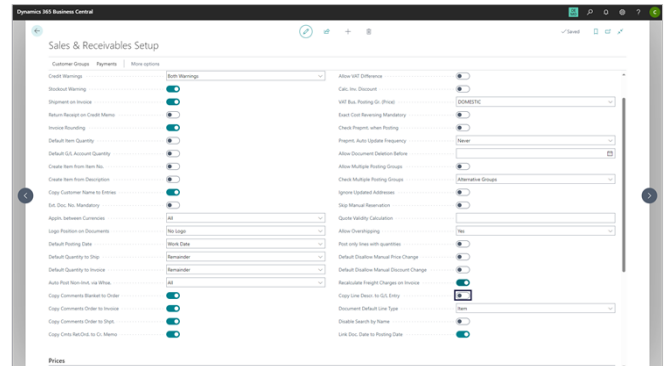
## Default Disallow Manual Discount Change



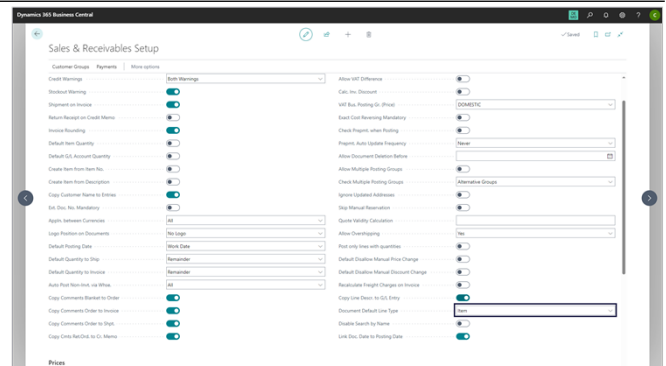
## Recalculate Freight Charges on Invoice



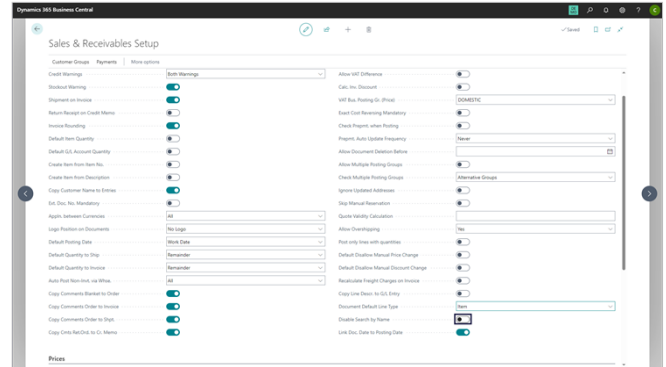
Specifies that the description on document lines of type G/L Account will be carried to the resulting general ledger entries.



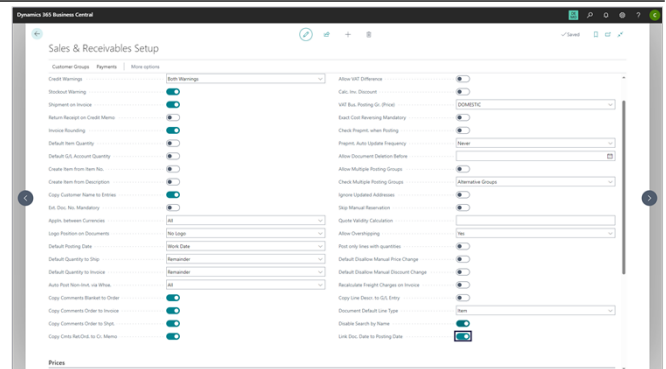
Specifies the default value for the Type field on the first line in new sales documents. If needed, you can change the value on the line.



Specifies that you can change the names of customers on open sales documents. The change applies only to the documents.

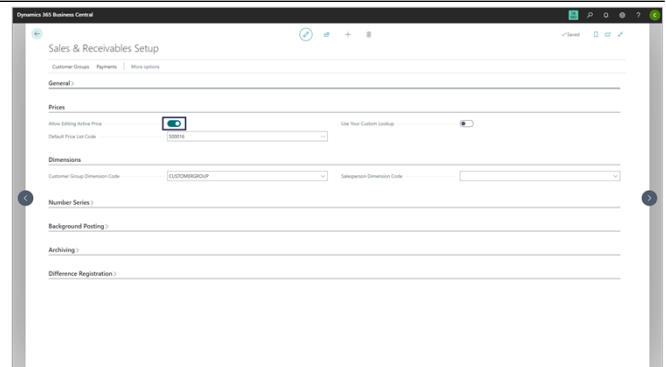


Specifies whether the document date changes when the posting date is modified.

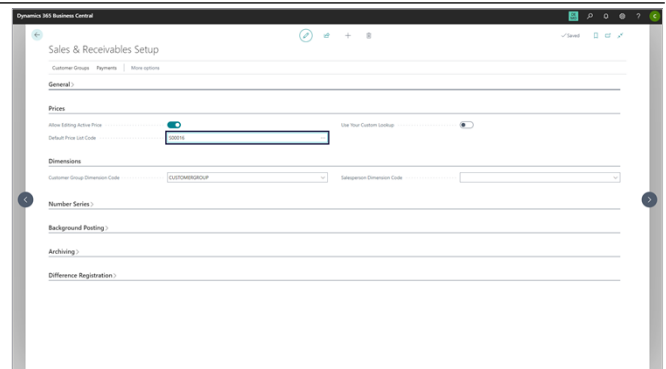


## Tab Prices

Specifies if the existing active sales price line can be modified or removed, or a new price line can be added to the active price list.

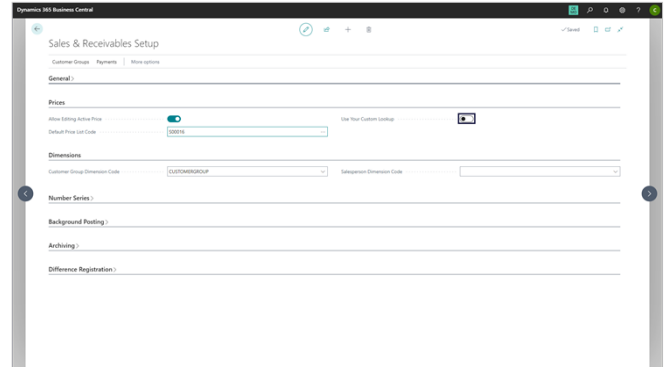


Specifies the code of the existing sales price list that stores all new price lines created in the price worksheet page.



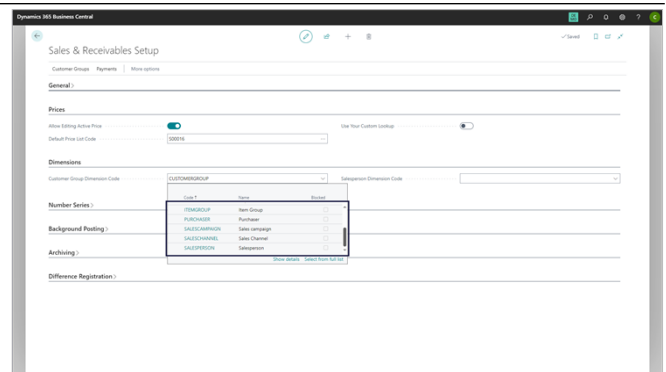
## K3 Pebblestone

Specifies whether the Assign-to Parent No., Assign-to No., and Product No. fields on price list pages use standard lookups to find records. If you have customized these fields and prefer your implementation, turn on this toggle.

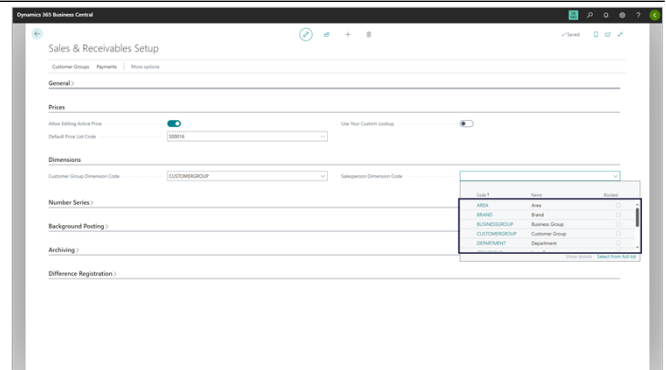


### Tab Dimensions

Specifies the dimension code for customer groups in your analysis report.

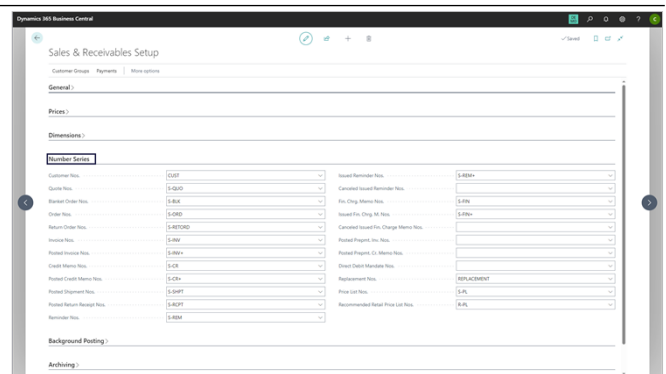


Specifies the dimension code for salespeople in your analysis report.



### Tab Number Series

Specifies the codes for the number series that will be used to assign numbers to different entities and documents.

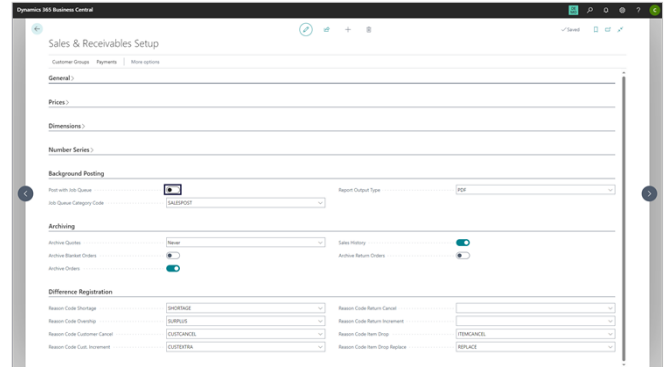


### Tab Background Posting

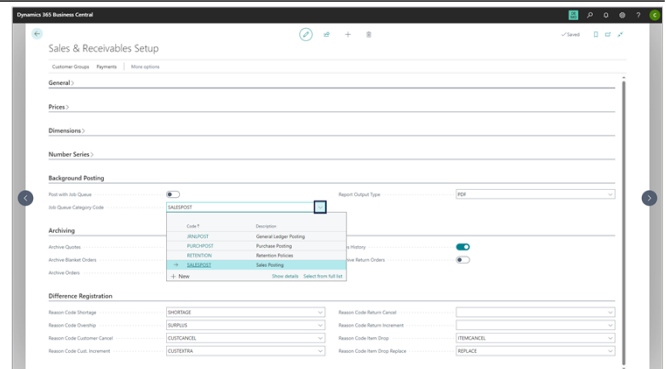


## K3 Pebblestone

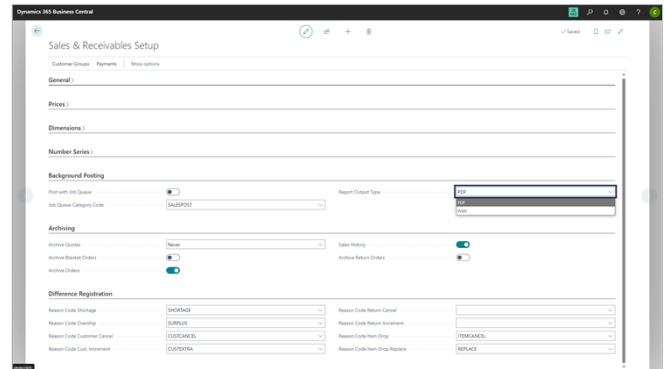
Specifies if you use job queues to post sales documents in the background.



Specifies the code for the category of the job queue that you want to associate with background posting.

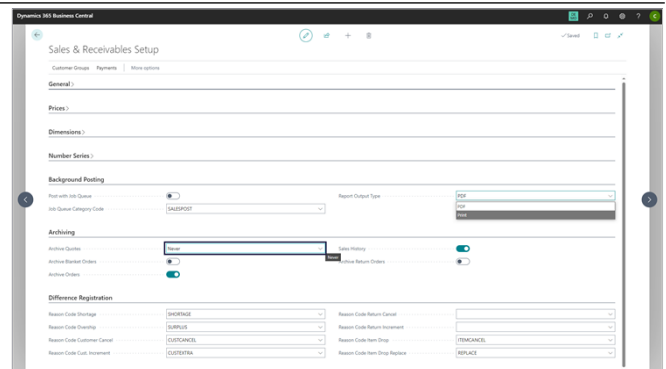


Specifies the output of the report that will be scheduled with a job queue entry when the Post and Print with Job Queue check box is selected.

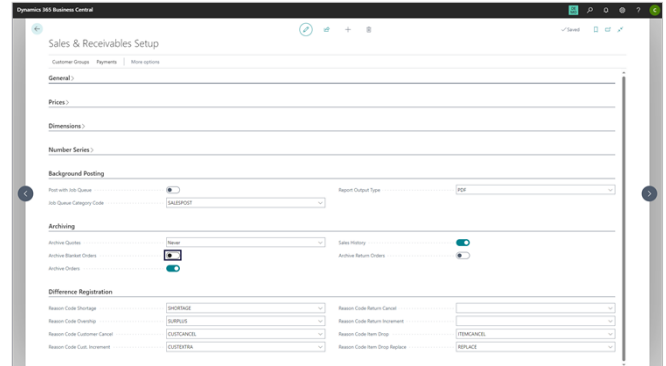


### Tab Archiving

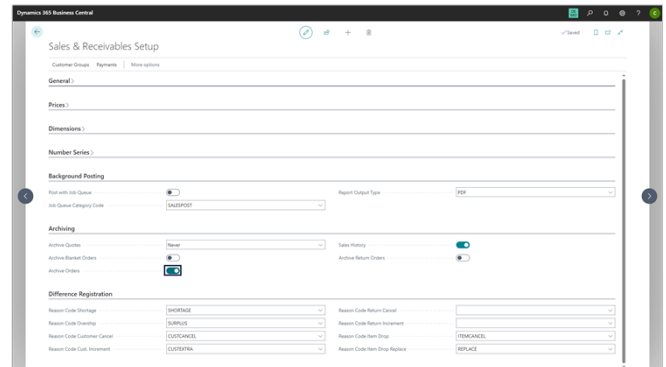
Specifies if you want to archive sales quotes when they are deleted.



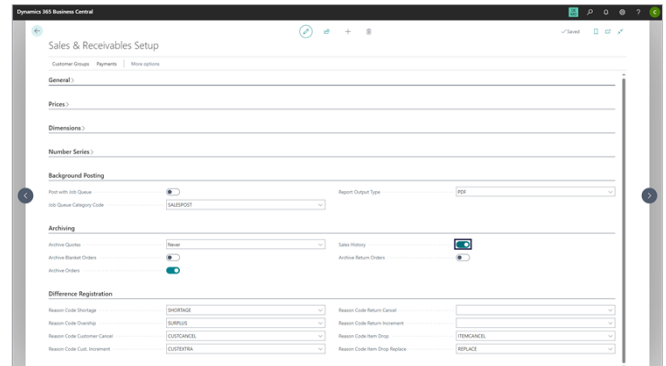
pecifies if you want to archive sales blanket orders when they are deleted.



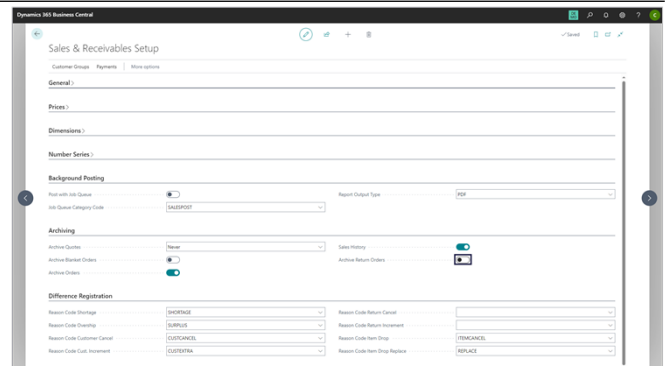
Specifies if you want to archive sales orders when they are deleted.



Sales History

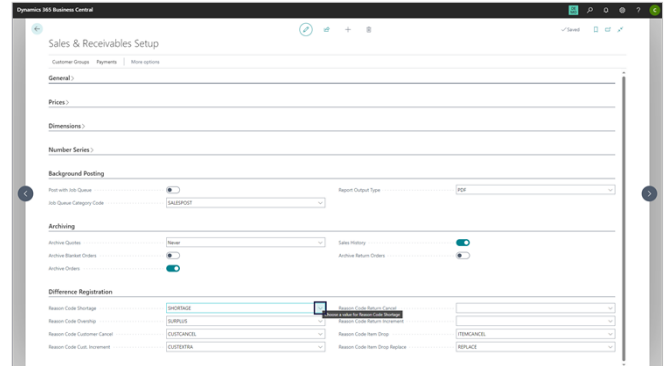


Specifies if you want to archive sales return orders when they are deleted.



Tab Difference Registration

## Reason Code Shortage



**Sales & Receivables Setup**

Customer Groups | Payments | Miscellaneous

**General**

**Prices**

**Dimensions**

**Number Series**

**Background Posting**

Post with Job Queue: ☐ Report Output Type: PDF

Job Queue Category Code: SALESPOST

**Archiving**

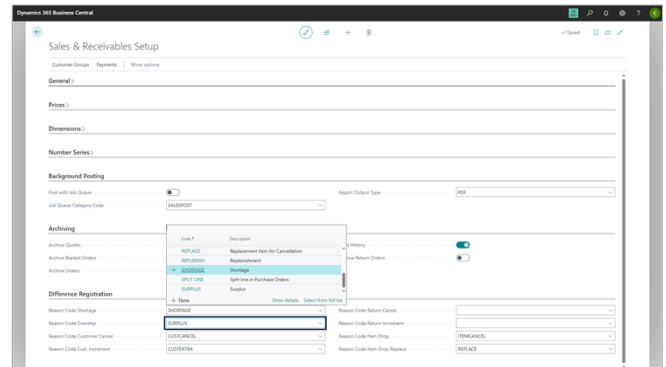
Archive Quotes: None Sales History: ☒

Archive Standard Orders: ☒ Archive Return Orders: ☐

**Difference Registration**

Reason Code Shortage	Reason Code Overship	Reason Code Customer Cancel	Reason Code Cust. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	OVERSHIP	CUSTOMERCANCEL	CUSTINCR				REPLACE

## Reason Code Overship



**Sales & Receivables Setup**

Customer Groups | Payments | Miscellaneous

**General**

**Prices**

**Dimensions**

**Number Series**

**Background Posting**

Post with Job Queue: ☐ Report Output Type: PDF

Job Queue Category Code: SALESPOST

**Archiving**

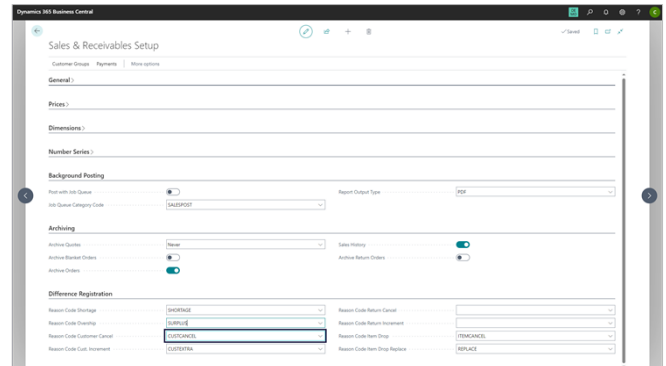
Archive Quotes: None Sales History: ☒

Archive Standard Orders: ☒ Archive Return Orders: ☐

**Difference Registration**

Reason Code Shortage	Reason Code Overship	Reason Code Customer Cancel	Reason Code Cust. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	OVERSHIP	CUSTOMERCANCEL	CUSTINCR				REPLACE

## Reason Code Customer Cancel



**Sales & Receivables Setup**

Customer Groups | Payments | Miscellaneous

**General**

**Prices**

**Dimensions**

**Number Series**

**Background Posting**

Post with Job Queue: ☐ Report Output Type: PDF

Job Queue Category Code: SALESPOST

**Archiving**

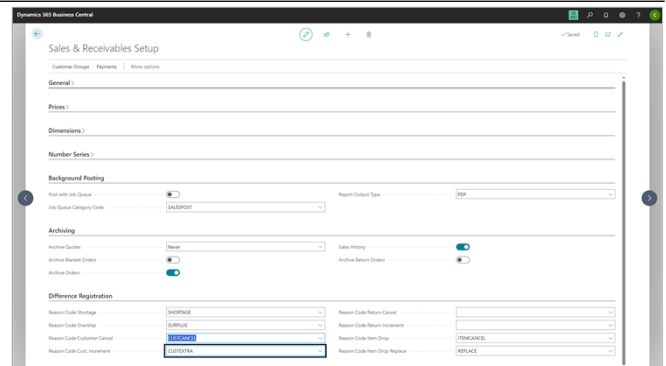
Archive Quotes: None Sales History: ☒

Archive Standard Orders: ☒ Archive Return Orders: ☐

**Difference Registration**

Reason Code Shortage	Reason Code Overship	Reason Code Customer Cancel	Reason Code Cust. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	OVERSHIP	CUSTOMERCANCEL	CUSTINCR				REPLACE

## Reason Code Cust. Increment



**Sales & Receivables Setup**

Customer Groups | Payments | Miscellaneous

**General**

**Prices**

**Dimensions**

**Number Series**

**Background Posting**

Post with Job Queue: ☐ Report Output Type: PDF

Job Queue Category Code: SALESPOST

**Archiving**

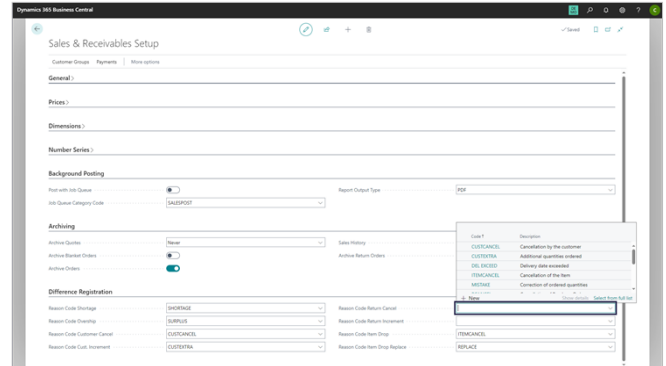
Archive Quotes: None Sales History: ☒

Archive Standard Orders: ☒ Archive Return Orders: ☐

**Difference Registration**

Reason Code Shortage	Reason Code Overship	Reason Code Customer Cancel	Reason Code Cust. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	OVERSHIP	CUSTOMERCANCEL	CUSTINCR				REPLACE

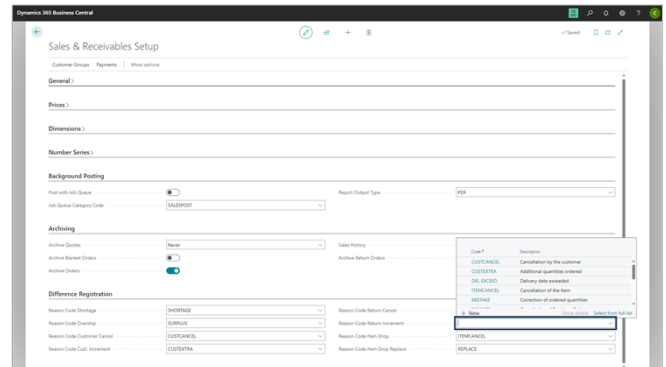
## Reason Code Return Cancel



The screenshot shows the 'Sales & Receivables Setup' window in Dynamics 365 Business Central. The 'Difference Registration' section is expanded, displaying a list of reason codes. The 'Reason Code Return Cancel' field is highlighted with a blue selection box.

Reason Code Shortage	Reason Code Overlap	Reason Code Customer Cancel	Reason Code Cus. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	SURPLUS	CUSTOMER	CUSTOMER	<b>REASON CODE RETURN CANCEL</b>	REASON CODE RETURN INCREMENT	REASON CODE ITEM DROP	REASON CODE ITEM DROP REPLACE

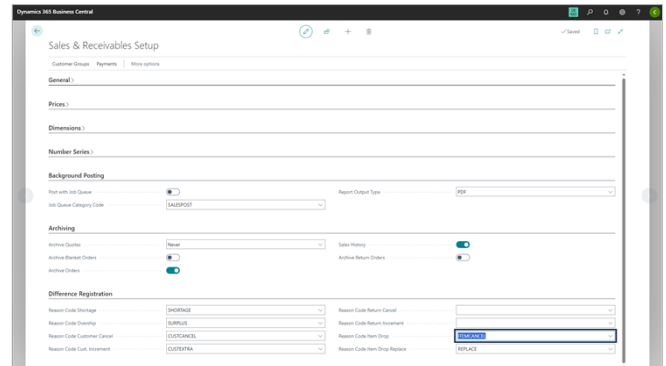
## Reason Code Return Increment



The screenshot shows the 'Sales & Receivables Setup' window in Dynamics 365 Business Central. The 'Difference Registration' section is expanded, displaying a list of reason codes. The 'Reason Code Return Increment' field is highlighted with a blue selection box.

Reason Code Shortage	Reason Code Overlap	Reason Code Customer Cancel	Reason Code Cus. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	SURPLUS	CUSTOMER	CUSTOMER	REASON CODE RETURN CANCEL	<b>REASON CODE RETURN INCREMENT</b>	REASON CODE ITEM DROP	REASON CODE ITEM DROP REPLACE

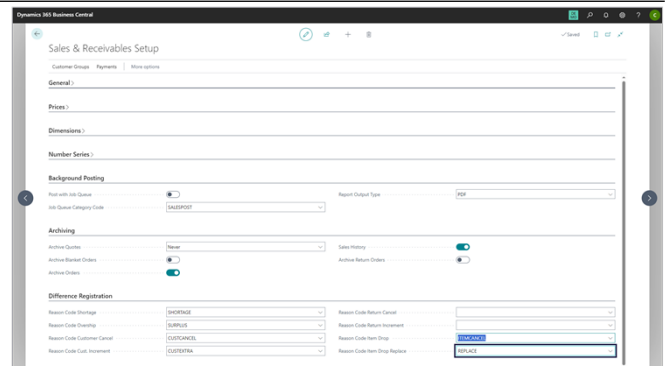
## Reason Code Item Drop



The screenshot shows the 'Sales & Receivables Setup' window in Dynamics 365 Business Central. The 'Difference Registration' section is expanded, displaying a list of reason codes. The 'Reason Code Item Drop' field is highlighted with a blue selection box.

Reason Code Shortage	Reason Code Overlap	Reason Code Customer Cancel	Reason Code Cus. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	SURPLUS	CUSTOMER	CUSTOMER	REASON CODE RETURN CANCEL	REASON CODE RETURN INCREMENT	<b>REASON CODE ITEM DROP</b>	REASON CODE ITEM DROP REPLACE

## Reason Code Item Drop Replace



The screenshot shows the 'Sales & Receivables Setup' window in Dynamics 365 Business Central. The 'Difference Registration' section is expanded, displaying a list of reason codes. The 'Reason Code Item Drop Replace' field is highlighted with a blue selection box.

Reason Code Shortage	Reason Code Overlap	Reason Code Customer Cancel	Reason Code Cus. Increment	Reason Code Return Cancel	Reason Code Return Increment	Reason Code Item Drop	Reason Code Item Drop Replace
SHORTAGE	SURPLUS	CUSTOMER	CUSTOMER	REASON CODE RETURN CANCEL	REASON CODE RETURN INCREMENT	REASON CODE ITEM DROP	<b>REASON CODE ITEM DROP REPLACE</b>

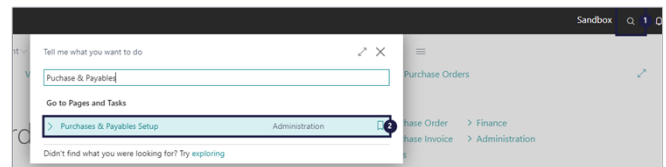
Thank you for watching!



## 1.4. Purchase & Payables Setup

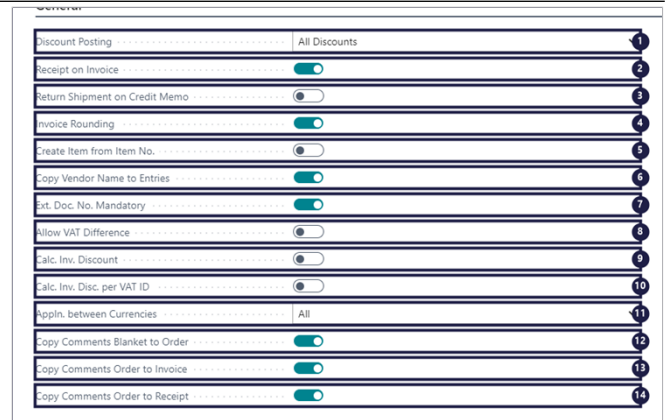
### Purchase & Payables Setup

1. Click on the link **Search** - Enter the text **Purchase & Payables**.
2. Click on **Purchases & Payables Setup Administration** ☐.

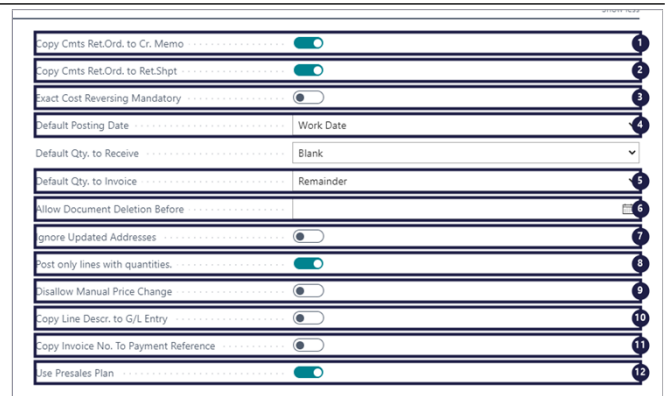


### General

1. **Discount Posting.**
2. **Receipt on Invoice.**
3. **Return Shipment on Credit Memo.**
4. **Invoice Rounding.**
5. **Create Item from Item No.**
6. **Copy Vendor Name to Entries.**
7. **Ext. Doc. No. Mandatory.**
8. **Allow VAT Difference.**
9. **Calc. Inv. Discount.**
10. **Calc. Inv. Disc. per VAT ID.**
11. **Appln. between Currencies.**
12. **Copy Comments Blanket to Order.**
13. **Copy Comments Order to Invoice.**
14. **Copy Comments Order to Receipt.**



1. **Copy Cmts Ret.Ord. to Cr. Memo.**
2. **Copy Cmts Ret.Ord. to Ret.Shtpt.**
3. **Exact Cost Reversing Mandatory.**
4. **Default Posting Date.**
5. **Default Qty. to Invoice.**  
Specifies the default value that is inserted in the Qty. to Invoice field in purchase order lines.
6. **Allow Document Deletion Before.**
7. **Ignore Updated Addresses.**
8. **Post only lines with quantities.**  
Specifies that only purchase lines with a value in the Qty. to Receive, Qty. to Invoice, or Return Qty. to Ship fields will be posted.
9. **Disallow Manual Price Change.**  
Indicates whether it is allowed to manually change purchase prices.
10. **Copy Line Descr. to G/L Entry.**
11. **Copy Invoice No. To Payment Reference.**



12. **Use Presales Plan.**  
Indicates whether or not presales orders are fulfilled by the presales plan. If you do not use presales plan the presales orders are included in the replenishment via the Requisition Worksheet. If you use presales plan the presales orders are fulfilled by the presales plan and they are excluded in the replenishment via the Requisition Worksheet. It will also be required to convert presales stock into direct stock to be able to resell remaining presales stock levels as never out of stock or direct orders.

## Number Series

1. **Vendor Nos.**
2. **Quote Nos.**
3. **Blanket Order Nos.**
4. **Order Nos.**
5. **Invoice Nos.**
6. **Posted Invoice Nos.**
7. **Credit Memo Nos.**
8. **Posted Credit Memo Nos.**
9. **Posted Receipt Nos.**

Vendor Nos.	1-9999	Posted Invoice Nos.	1-9999
Quote Nos.	1-9999	Posted Credit Memo Nos.	1-9999
Blanket Order Nos.	1-9999	Posted Receipt Nos.	1-9999
Order Nos.	1-9999		
Invoice Nos.	1-9999		

## Background Posting

1. **Post with Job Queue.**
2. **Post & Print with Job Queue.**
3. **Job Queue Category Code.**
4. **Notify On Success.**
5. **Report Output Type.**

Post with Job Queue	1	Notify On Success	1
Post & Print with Job Queue	1	Report Output Type	1
Job Queue Category Code	1-9999		

## Archiving

1. **Archive Quotes.**
2. **Archive Orders.**
3. **Archive Blanket Orders.**

Archive Quotes	1	Archive Blanket Orders	1
Archive Orders	1		

## Default Accounts

1. **Default Debit Account for Non-Item Lines.**
2. **Default Credit Account for Non-Item Lines.**

Default Debit Account for Non-Item Lines	1-9999	Default Credit Account for Non-Item Lines	1-9999
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## Difference Registration

1. **Reason Code Shortage.**  
Specifies the reason code that will be used as default to register cancellations due to shortages.
2. **Reason Code Over Receive.**  
Specifies the reason code that will be used as default to register the change when you receive more than ordered.
3. **Reason Code Cancel.**  
Specifies the reason code that will be used as default to register a cancellation by the vendor.

Reason Code Shortage	1-9999	Reason Code Cancel	1-9999
Reason Code Over Receive	1-9999	Reason Code Over Receive	1-9999

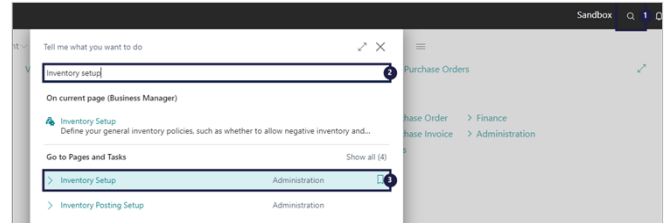


4. **Reason Code Increment.**  
Specifies the reason code that will be used as default to register an increment by the vendor.

## 1.5. Inventory setup

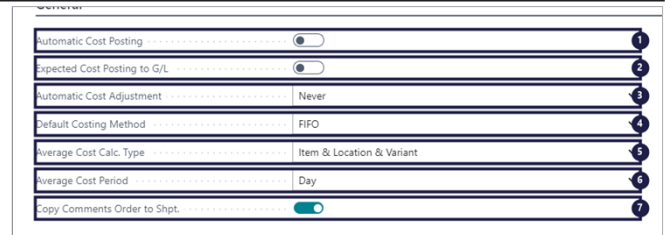
### Inventory setup

1. Click on the link **Search**.
2. Click on the field **Tell me what you want to do** - Enter the text **Inventory setup**.
3. Click on **Inventory Setup Administration**.

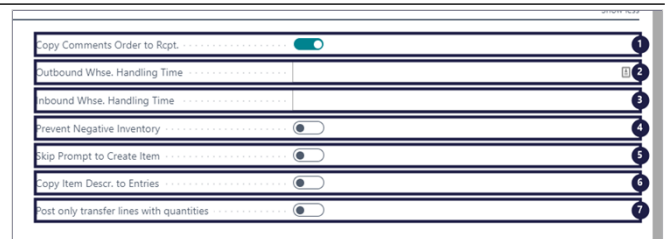


### General

1. **Automatic Cost Posting.**
2. **Expected Cost Posting to G/L.**
3. **Automatic Cost Adjustment Never**  
**Day Week Month Quarter Year**  
**Always.**
4. **Default Costing Method.**
5. **Average Cost Calc. Type.**
6. **Average Cost Period.**
7. **Copy Comments Order to Shpt.**



1. **Copy Comments Order to Rcpt.**
2. **Outbound Whse. Handling Time.**
3. **Inbound Whse. Handling Time.**
4. **Prevent Negative Inventory.**
5. **Skip Prompt to Create Item.**
6. **Copy Item Descr. to Entries.**
7. **Post only transfer lines with quantities.**  
Specifies that only transfer lines with a value in the Qty. to Ship, Qty. to Receive fields will be posted.



### Location

1. **Location Mandatory.**



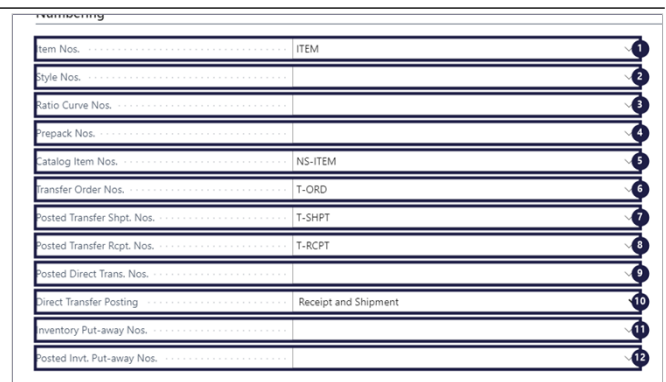
### Dimensions

1. **Item Group Dimension Code.**



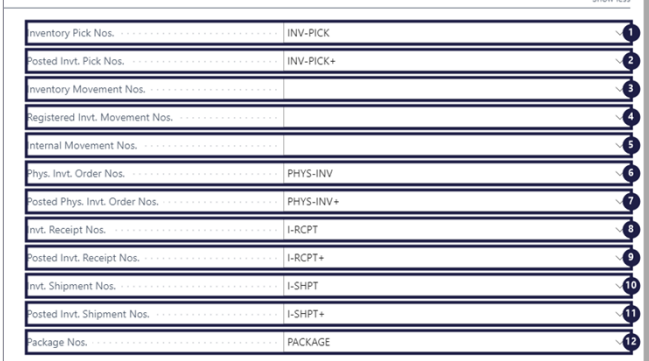
### Numbering

1. **Item Nos.**
2. **Style Nos.**  
Specifies the number series code that will be used to assign numbers to styles.
3. **Ratio Curve Nos.**  
Specifies the number series code that will be used to assign numbers to ratio curves.
4. **Prepack Nos.**  
Specifies the number series code that will be used to assigned numbers to



- Prepacks.
5. **Catalog Item Nos.**
  6. **Transfer Order Nos.**
  7. **Posted Transfer Shpt. Nos.**
  8. **Posted Transfer Rcpt. Nos.**
  9. **Posted Direct Trans. Nos.**
  10. **Direct Transfer Posting.**
  11. **Inventory Put-away Nos.**
  12. **Posted Invt. Put-away Nos.**


1. **Inventory Pick Nos.**
  2. **Posted Invt. Pick Nos.**
  3. **Inventory Movement Nos.**
  4. **Registered Invt. Movement Nos.**
  5. **Internal Movement Nos.**
  6. **Phys. Invt. Order Nos.**
  7. **Posted Phys. Invt. Order Nos.**
  8. **Invt. Receipt Nos.**
  9. **Posted Invt. Receipt Nos.**
  10. **Invt. Shipment Nos.**
  11. **Posted Invt. Shipment Nos.**
  12. **Package Nos.**
- Specifies the number series that will be used to assign numbers to packages.

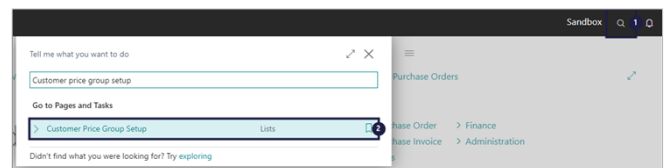


Inventory Pick Nos.	INV-PICK	1
Posted Invt. Pick Nos.	INV-PICK+	2
Inventory Movement Nos.		3
Registered Invt. Movement Nos.		4
Internal Movement Nos.		5
Phys. Invt. Order Nos.	PHYS-INV	6
Posted Phys. Invt. Order Nos.	PHYS-INV+	7
Invt. Receipt Nos.	I-RCPT	8
Posted Invt. Receipt Nos.	I-RCPT+	9
Invt. Shipment Nos.	I-SHPT	10
Posted Invt. Shipment Nos.	I-SHPT+	11
Package Nos.	PACKAGE	12

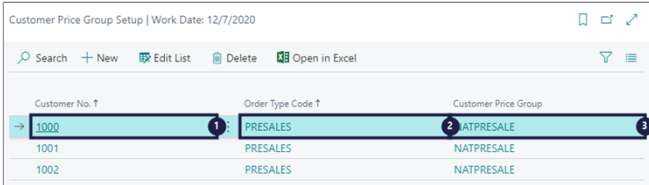
## 1.6. Customer price group Setup

### 1.6.1. Navigate to Customer price group Setup

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.**  
- Enter the text **Customer price group setup**.
2. Click on **Customer Price Group Setup Lists** .




1. **Customer No.**  
Specifies the customer account number for which the price groups are setup per order type.
2. **Order Type Code.**  
Specifies the order type for which you want to setup special discounts.
3. **Customer Price Group.**  
Specifies the customer price group code for this order type, which you can use as a criterion to set up special prices in the Sales Prices window.

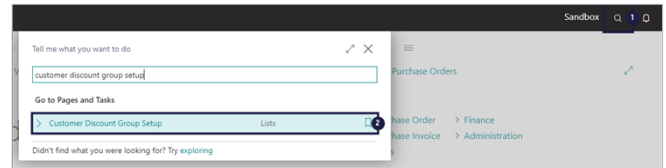


Customer No. ↑	Order Type Code ↑	Customer Price Group
1000	PRESALES	NATPRESALE
1001	PRESALES	NATPRESALE
1002	PRESALES	NATPRESALE
1003	PRESALES	NATPRESALE

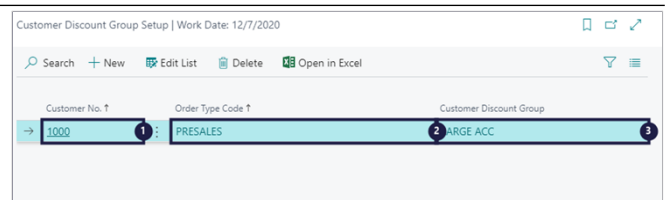
## 1.7. Customer discount group Setup

### 1.7.1. Navigate to Customer discount group Setup

1. Click on the link **Tell me what you want to do**. Quickly access actions, pages, reports, documentation, and apps and consulting services.  
- Enter the text **customer discount group setup**.
2. Click on **Customer Discount Group Setup Lists** .




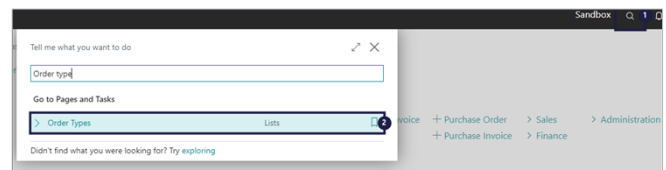
1. **Customer No.**  
Specifies the customer account number for which the price groups are setup per order type.
2. **Order Type Code.**  
Specifies the order type for which you want to setup special discounts.
3. **Customer Discount Group.**  
Specifies the customer discount group code for this order type, which you can use as a criterion to set up special discounts in the Sales Line Discounts window.



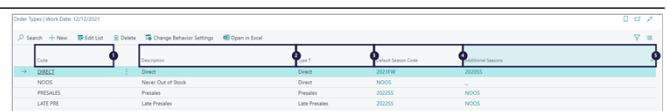
## 1.8. Order type Setup

Navigate to Order type

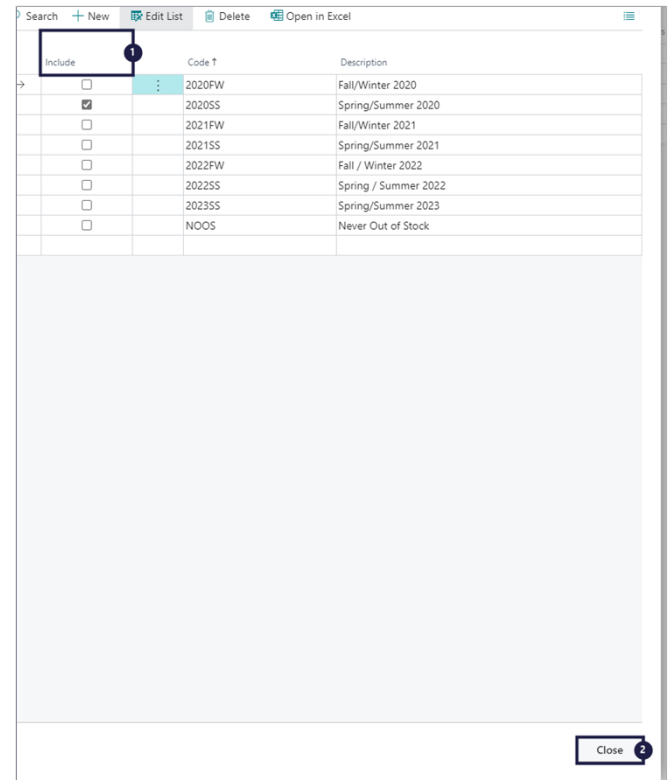
1. Click on the link **Search** - Enter the text **Order type**.
2. Click on **Order Types Lists** .



1. **Code.**  
Specifies a code for the order type.
2. **Description.**  
Specifies a description for the order type.
3. **Type.**  
Specifies the type that the Order Type applies to. The available options are, Direct, Presales, and Late Presales. The type controls the default behavior settings and is used on documents to separate presales and late presales orders from direct orders.
4. **Default Season Code.**  
Specifies the default season code that is used for this order type.
5. **Additional Seasons.**  
Setup a filter for extra seasons to enable the selection of items which belong to these seasons on documents.



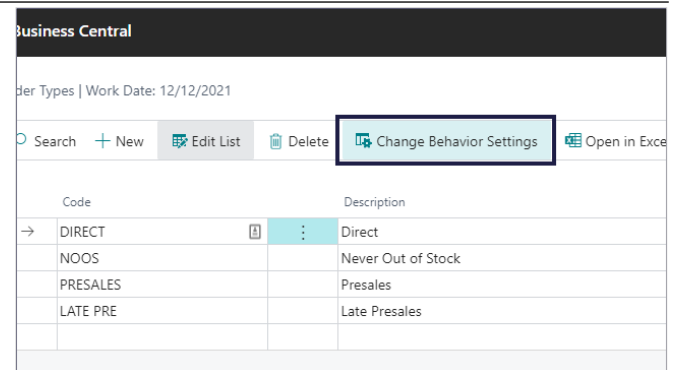
1. **Include.**  
To add multiple seasons include the seasons.
2. **Close.**



Code	Description
2020FW	Fall/Winter 2020
2020SS	Spring/Summer 2020
2021FW	Fall/Winter 2021
2021SS	Spring/Summer 2021
2022FW	Fall / Winter 2022
2022SS	Spring / Summer 2022
2023SS	Spring/Summer 2023
NOOS	Never Out of Stock

### Change Behavior Settings

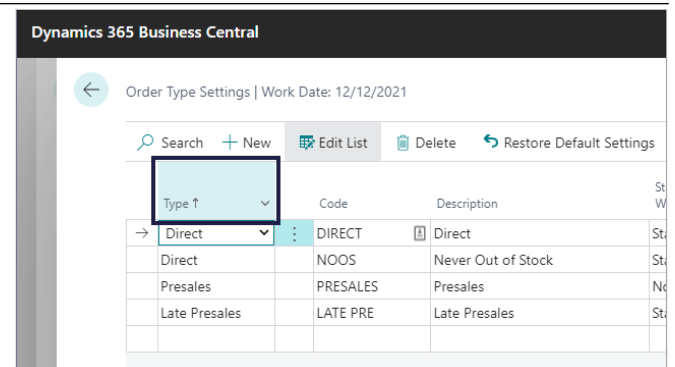
Change how, in particular, order entry behaves for sales documents with this order type assigned.



Code	Description
DIRECT	Direct
NOOS	Never Out of Stock
PRESALES	Presales
LATE PRE	Late Presales

### Type

Specifies the type that the Order Type applies to. The available options are, Direct, Presales, and Late Presales.



Type	Code	Description
Direct	DIRECT	Direct
Presales	PRESALES	Presales
Late Presales	LATE PRE	Late Presales

## Code

Specifies a code for the order type.

**Dynamics 365 Business Central**

Order Type Settings | Work Date: 12/12/2021

Search + New Edit List Delete Restore Default Settings

Type ↑	Code	Description	Stockout Warning
→ Direct	DIRECT	Direct	Standard
Direct	NOOS	Never Out of Stock	Standard
Presales	PRESALES	Presales	None
Late Presales	LATE PRE	Late Presales	Standard

## Description

Specifies a description for the order type.

**Dynamics 365 Business Central**

Order Type Settings | Work Date: 12/12/2021

Search + New Edit List Delete Restore Default Settings Open in Excel

Type ↑	Code	Description	Stockout Warning
→ Direct	DIRECT	Direct	Standard
Direct	NOOS	Never Out of Stock	Standard
Presales	PRESALES	Presales	None
Late Presales	LATE PRE	Late Presales	Standard

## Stockout Warning

Specifies if a warning is displayed when you enter a quantity on a sales document that brings the item's inventory level below zero. Stockout warning typically will be 'No' for presales.

**Dynamics 365 Business Central**

Order Type Settings | Work Date: 12/12/2021

Edit List Delete Restore Default Settings Open in Excel

Code	Description	Stockout Warning	Credit Warning	Shipment Date Based On
DIRECT	Direct	Standard	Standard	Workdate of the Sales Document
NOOS	Never Out of Stock	Standard	Standard	Workdate of the Sales Document
PRESALES	Presales	None	None	Starting Date of the Delivery
LATE PRE	Late Presales	Standard	None	Starting Date of the Delivery

## Credit Warning

Specifies whether to warn about the customer's status when you create a sales order or invoice.

**Dynamics 365 Business Central**


Order Type Settings | Work Date: 12/12/2021

Edit List Delete Restore Default Settings Open in Excel

Description	Stockout Warning	Credit Warning	Shipment Date Based On
Direct	Standard	Standard	Workdate of the Sales Document
Never Out of Stock	Standard	Standard	Workdate of the Sales Document
Presales	None	None	Starting Date of the Delivery
Late Presales	Standard	None	Starting Date of the Delivery

### Shipment Date Based On

Specifies the date that will determine the shipment date.

ult Settings  Open in Excel

Stockout Warning	Credit Warning	Shipment Date Based On	Auto C
Standard	Standard	Workdate of the Sales Document	
Standard	Standard	Workdate of the Sales Document	
None	None	Starting Date of the Delivery Drop	
Standard	None	Starting Date of the Delivery Drop	

### Auto Cancel Remnants

Specifies if the remaining quantity will automatically be canceled when shipping less then the ordered quantity.

Shipment Date Based On	Auto Cancel Remnants	Reason Code for canceled remnants
Workdate of the Sales Document	<input checked="" type="checkbox"/>	SHORTAGE
Workdate of the Sales Document	<input checked="" type="checkbox"/>	SHORTAGE
Starting Date of the Delivery Drop	<input type="checkbox"/>	
Starting Date of the Delivery Drop	<input type="checkbox"/>	

### Reason Code for canceled remnants

Specifies the reason code that will be used to register an automatic cancellation of remaining quantities.



Sandbox


Auto Cancel Remnants	Reason Code for canceled remnants	Default Quantity to Ship	Default Quantity to Invoice
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder
<input type="checkbox"/>		Blank	Remainder
<input type="checkbox"/>		Blank	Remainder


### Default Quantity to Ship

Specifies the default value that is inserted in the Qty. to Ship field on sales order lines.

*Set the value to Blank if you use the Delivery plan otherwise you will not see the Sales orders.*

Sandbox  

✓ Saved 

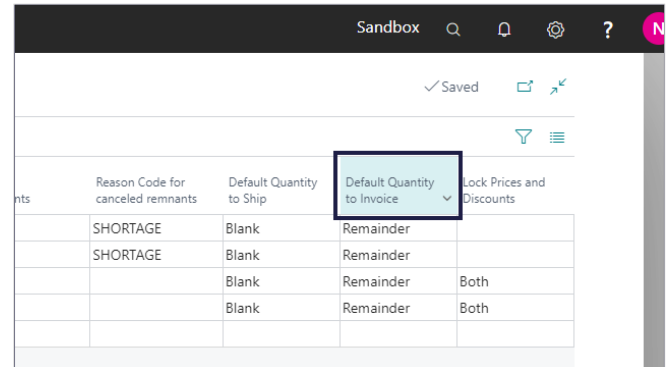


Auto Cancel Remnants	Reason Code for canceled remnants	Default Quantity to Ship	Default Quantity to Invoice	Lock Prices and Discounts
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder	
<input checked="" type="checkbox"/>	SHORTAGE	Blank	Remainder	
<input type="checkbox"/>		Blank	Remainder	Both
<input type="checkbox"/>		Blank	Remainder	Both



## Default Quantity to Invoice

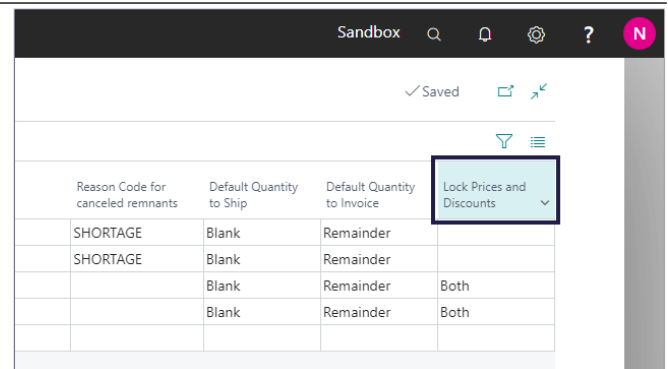
Specifies the default value that is inserted in the Qty. to Invoice field on sales order lines.



Reason Code for canceled remnants	Default Quantity to Ship	Default Quantity to Invoice	Lock Prices and Discounts
SHORTAGE	Blank	Remainder	
SHORTAGE	Blank	Remainder	
	Blank	Remainder	Both
	Blank	Remainder	Both

## Lock Prices and Discounts


Specifies if the Unit Price or Line Discount % will be locked on releasing the sales order.

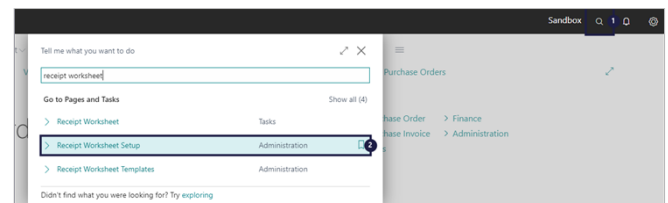


Reason Code for canceled remnants	Default Quantity to Ship	Default Quantity to Invoice	Lock Prices and Discounts
SHORTAGE	Blank	Remainder	
SHORTAGE	Blank	Remainder	
	Blank	Remainder	Both
	Blank	Remainder	Both

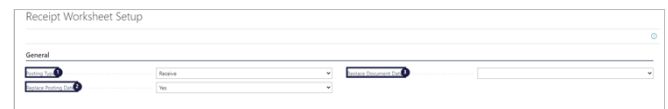
# 1.9. Receipt worksheet setup

## 1.9.1. Navigate to receipt worksheet setup

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **receipt worksheet**.
2. Click on **Receipt Worksheet Setup Administration** .



1. **Posting Type.**  
Specifies how the source document lines will be processed when you post the receipt worksheet. Available options are: Update, Receive, or Receive & Invoice.
2. **Replace Posting Date.**  
Indicates whether you want to replace the posting date of the source document upon posting the receipt worksheet. Available options are: No, Yes.
3. **Replace Document Date.**  
Indicates whether you want to replace the document date of the source document upon posting the receipt worksheet. Available options are: No, Yes.

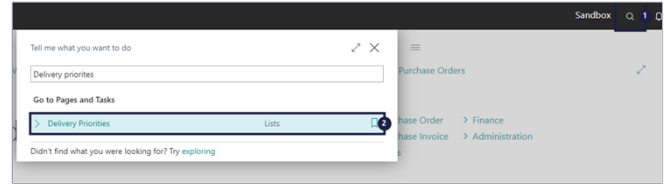


## 1.10.Delivery priorities

The delivery priority is used as a sorting sequence when allocating available stock to sales orders.

Delivery priorities

1. Click on the link **Search** - Enter the text **Delivery priorities**.
2. Click on **Delivery Priorities Lists**.

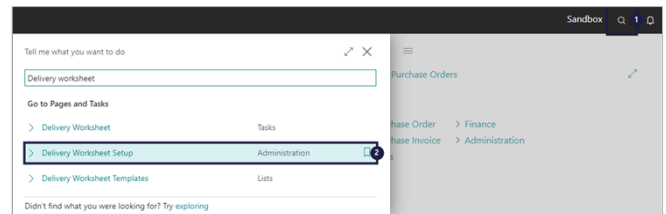


1. **Code**  
Specifies the code that identifies the delivery priority.
2. **Description**  
Specifies the description of the delivery priority.

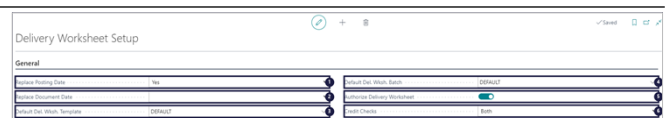
Code	Description
10-HIGH	High Priority
20-AVERAGE	Average priority
30-LOW	Low priority

## 1.11.Delivery worksheet Setup

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **Delivery worksheet**.
2. Click on **Delivery Worksheet Setup Administration**.



1. **Replace Posting Date No Yes.**  
Indicates whether you want to replace the posting date of the source document upon posting the delivery worksheet.
2. **Replace Document Date No Yes.**  
Indicates whether you want to replace the document date of the source document upon posting the delivery worksheet.
3. **Default Del. Wksh. Template.**  
Specifies the delivery worksheet template in which the delivery line will be created when created from the source document.
4. **Default Del. Wksh. Batch.**  
Specifies the delivery worksheet batch in which the delivery line will be created when created from the source document.
5. **Authorize Delivery Worksheet.**  
Indicates whether a credit check is performed when posting the delivery worksheet. If this field is not marked, the field Credit Checks = No Check.
6. **Credit Checks No Check Credit Limit Overdue Balance Both.**  
Specifies which credit check is performed when posting the delivery worksheet. The options are No

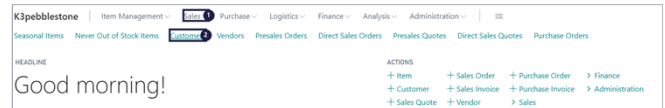


Check, Credit Limit, Overdue balance  
or Both.

## 1.12.Retail location

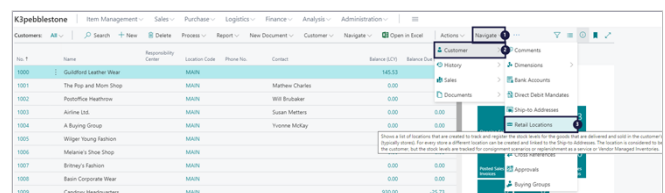
### 1.12.1. Navigate to Retail location

1. **Sales.**
2. **Customers.**

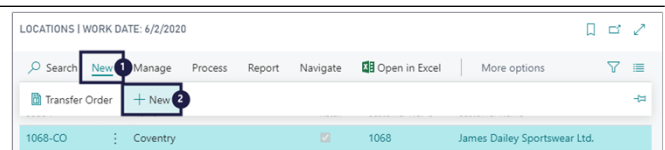


### 1.12.2. Create a new Retail Location

1. Click on the navigation menu item popup **Navigate**.
2. Move the mouse to the navigation menu item popup **Customer**.
3. Click on **Retail Locations**, it **Shows a list of locations that are created to track and register the stock levels for the goods that are delivered and sold in the customer's locations (typically stores). For every store a different location can be created and linked to the Ship-to Addresses. The location is considered to be owned by the customer, but the stock levels are tracked for consignment scenarios or replenishment as a service or Vendor Managed Inventories.**



1. Click on the navigation menu item popup **New**.
2. Click on the navigation menu item **New**.



1. **Code.**  
Specifies a location code for the warehouse or distribution center where your items are handled and stored before being sold.
2. **Name.**  
Specifies the name or address of the location.
3. **Use As In-Transit.**  
Specifies that this location is an in-transit location.
4. **Customer No.**  
Specifies the number of the customer that owns this location, which is typically a store or distribution center.
5. **Customer Name James Dailey Sportswear Ltd.**  
Specifies the customer that owns this location, which is typically a store




or distribution center.

1. **Address.**  
Specifies the location address.
2. **Address 2.**  
Specifies additional address information.
3. **Post Code.**  
Specifies the postal code.
4. **City.**  
Specifies the city of the location.
5. **Country/Region Code.**  
Specifies the country/region of the address.
6. **Contact.**  
Specifies the name of the contact person at the location.
7. **Phone No.**  
Specifies the telephone number of the location.
8. **Fax No.**  
Specifies the fax number of the location.
9. **Email.**  
Specifies the email address of the location.
10. **Home Page.**  
Specifies the location's web site.

1. **Main Location Code.**  
For a Retail Location a Main Location can be selected as well. This is the nearest Warehouse to the Retail Location and will be used later to transfer goods from the warehouses to the Retail Locations (stores).

## 1.13. Buying group

### 1.13.1. Navigate to Buying Group Setup

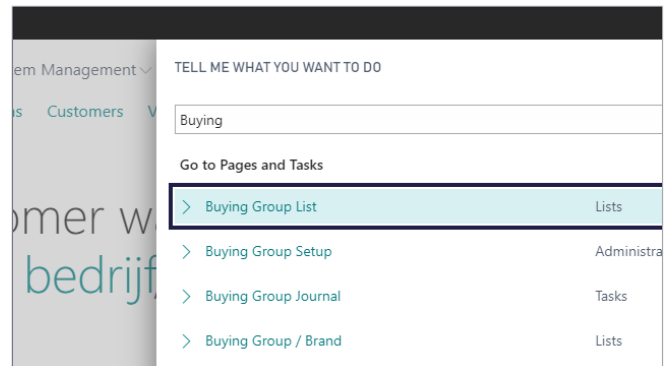
1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.**  
- Enter the text **Buying**.
2. Click on **Buying Group Setup Administration** .

1. **Setup the Caption Expressions for the Buying Group.**
2. **Enable Buying Groups.**  
Indicates that your company wants to use th Buying Groups functionality. By setting this checkmark the Buying Groups becomes available in the solution.
3. **Buying Group Nos.**

Specifies the code for the number series that will be used to assign numbers to Buying. To see the number series that have been set up in the No. Series table, click the field.

## 1.13.2. Navigate to Buying Group List

Click on **Buying Group List Lists** ☐



System Management > Customers > Buying

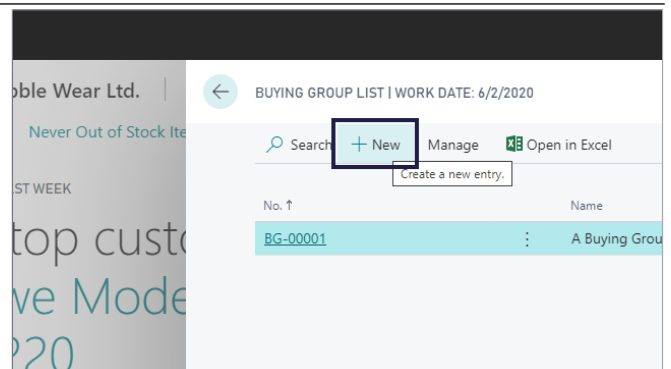
TELL ME WHAT YOU WANT TO DO

Buying

Go to Pages and Tasks

- > Buying Group List Lists
- > Buying Group Setup Administration
- > Buying Group Journal Tasks
- > Buying Group / Brand Lists

Create a new entry.



able Wear Ltd. | BUYING GROUP LIST | WORK DATE: 6/2/2020

Never Out of Stock Item

Search + New Manage Open in Excel

Create a new entry.

No. 1 Name

BG-00001 A Buying Group

- No.**  
Specifies the number of the buying group. The field is either filled automatically from a defined number series, or you enter the number manually because you have enabled manual number entry in the number-series setup.
- Name.**  
Specifies the name of the buying group. This name will appear on all documents for the buying group. You can enter a maximum of 50 characters, both numbers and letters.
- Customer No.**  
Specifies the name of the buying group. This name will appear on all documents for the buying group. You can enter a maximum of 50 characters, both numbers and letters.
- Customer Name A Buying Group.**  
Specifies the name of the customer that is created in the system for the buying group.
- Vendor No.**  
Specifies the number of the vendor



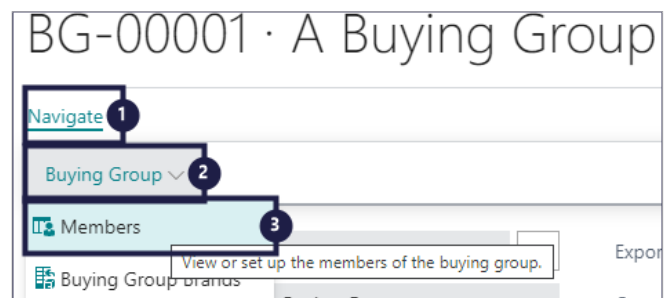
General

No.	BG-00001	Exportfile	C:\temp\intres\intres.bit
Name	A Buying Group	Create Extra Invoice	<input checked="" type="checkbox"/>
Customer No.	1004	Create Report	<input checked="" type="checkbox"/>
Customer Name	A Buying Group	Create File	<input checked="" type="checkbox"/>
Vendor No.		Control Number	4321
Vendor Name		Company Number	12
Report ID	11179205	Our Member No.	4321
Report Name	K3PF Buying Grp. P/D Euretco		

- that is created in the system for the buying group. This vendor number will be used to pay the buying group.
6. **Vendor Name.**  
Specifies the name of the vendor that is created in the system for the buying group.
  7. **Report ID.**  
Specifies the report that is used to print invoices for the buying group.
  8. **Report Name K3PF Buying Grp. P/D Euretco.**  
Specifies the name of the report that is used to print invoices and create files for the buying group.
  9. **Exportfile.**  
Specifies the directory and file name of the files that are created.
  10. **Create Extra Invoice.**  
Indicates whether or not an additional invoice is required for the buying group.
  11. **Create Report.**  
Indicates whether or not an report is required for the buying group.
  12. **Create File.**  
Indicates whether or not an file have to be created for file exchange with the buying group.
  13. **Control Number.**  
Specifies the buying group control number, which is used in the communication with the buying group.
  14. **Company Number.**  
Specifies the company number of the buying group.
  15. **Our Member No.**  
Specifies the member number of your company with the buying group.

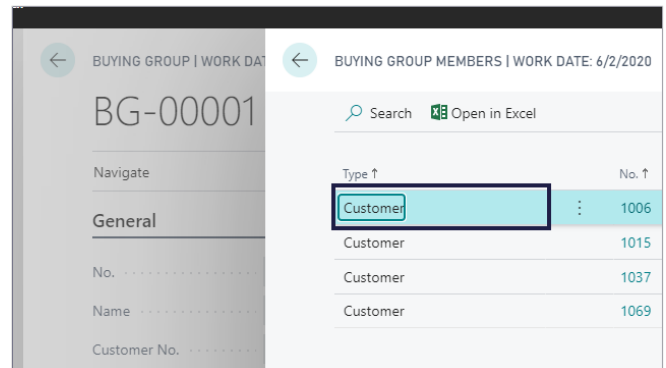
### 1.13.3. Navigate to Buying Group members

1. Click on the navigation menu item popup **Navigate**.
2. Click on the navigation menu item popup **Buying Group**.
3. **View or set up the members of the buying group.**



### Type

Indicates if the member is a vendor or a customer.





BUYING GROUP MEMBERS   WORK DATE: 6/2/2020	
Type ↑	No. ↑
Customer	1006
Customer	1015
Customer	1037
Customer	1069

### No.

Specifies the number of the customer or vendor that has a membership with a buying group.

← BUYING GROUP MEMBERS | WORK DATE: 6/2/2020

 Search  Open in Excel

Type ↑	No. ↑	Member No.
Customer	1006	581900
Customer	1015	41234-34
Customer	1037	458910
Customer	1069	345345

### Member No.

Specifies the buying group's member number of the customer or vendor.

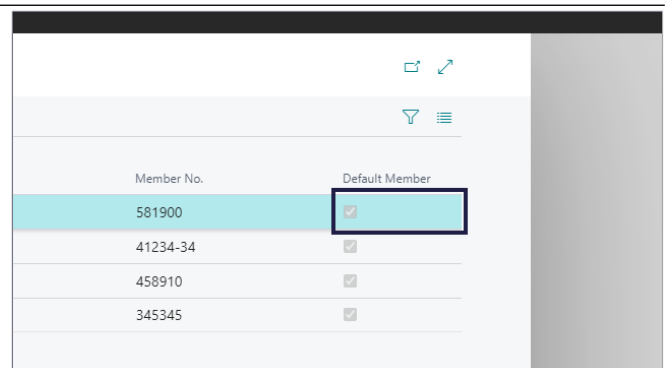
ORK DATE: 6/2/2020

el

No. ↑	Member No.	Default Member
⋮ 1006	581900	<input checked="" type="checkbox"/>
1015	41234-34	<input checked="" type="checkbox"/>
1037	458910	<input checked="" type="checkbox"/>
1069	345345	<input checked="" type="checkbox"/>

### Default Member

Indicates that this is the preferred buying group to use for the customer or vendor. There can only be one default buying group per customer or vendor.



BUYING GROUP MEMBERS   WORK DATE: 6/2/2020	
Member No.	Default Member
581900	<input checked="" type="checkbox"/>
41234-34	<input checked="" type="checkbox"/>
458910	<input checked="" type="checkbox"/>
345345	<input checked="" type="checkbox"/>



### 1.13.4. Navigate to Buying Group Brands

1. Move the mouse to the navigation menu item popup **Buying Group**.
2. Click on the navigation menu item **Buying Group Brands**.

1. Click on the navigation menu item **New**.
2. **Brand Code.**  
Select a brand to associate with the buying group.

### 1.13.5. Navigate to Buying Group Journal

1. Click on **Buying Group Journal Tasks** ☐.

#### Posting Date

Specifies the posting date for the entry.

#### Document Type

Specifies the type of document that the entry on the journal line is.

**Document No.**

Specifies a document number for the journal line.

Batch Name						
Manage	Process	Page	Post/Print	Line	Account	More options
Posting Date	Document Type	Document No.	Account Type	Account No.	Recipient Bank Account	
→ 6/2/2024			G/L Account *			

**Account Type**

Specifies the type of account that the entry on the journal line will be posted to.

Batch Name						
Manage	Process	Page	Post/Print	Line	Account	More options
Posting Date	Document Type	Document No.	Account Type	Account No.	Recipient Bank Account	Message Recipient
→ 6/2/2024			G/L Account *			
			G/L Account			

**Account No.**

Specifies the account number that the entry on the journal line will be posted to.

Batch Name						
Manage	Process	Page	Post/Print	Line	Account	More options
Posting Date	Document Type	Document No.	Account Type	Account No.	Recipient Bank Account	Message to Recipient
→ 6/2/2024			G/L Account *			
				Look up value		

**Recipient Bank Account**

Specifies the bank account that the amount will be transferred to after it has been exported from the buying group journal.

Batch Name						
Manage	Process	Page	Post/Print	Line	Account	More options
Document No.	Account Type	Account No.	Recipient Bank Account	Message to Recipient	Description	Credits
	G/L Account *					

**Message to Recipient**

Specifies the message exported to the payment file when you use the Export Payments to File function in the Buying Group Journal window.

.....							
DEFAULT							
Print Line Account More options							
Account Type	Account No.	Recipient Bank Account	Message to Recipient	Description	Creditor No.	Doc	A
G/L Account *							

**Description**

Specifies a description of the entry.

.....							
DEFAULT							
Account More options							
Account No.	Recipient Bank Account	Message to Recipient	Description	Creditor No.	Document Amount		
					0.00		

**Creditor No.**

Specifies the vendor who sent the purchase invoice.

.....							
DEFAULT							
More options							
Recipient Bank Account	Message to Recipient	Description	Creditor No.	Document Amount	Amount	Am	
				0.00	0.00		

**Document Amount**

Specifies the total amount (including VAT) that the journal line consists of.

.....							
DEFAULT							
Recipient Bank Account	Message to Recipient	Description	Creditor No.	Document Amount	Amount	Amount (LCV)	
				0.00	0.00	0.00	

**Amount**

Specifies the total amount (including VAT) that the journal line consists of.

..... DEFAULT						
to	Description	Creditor No.	Document Amount	Amount	Amount (LCY)	Total Exported Amount
			0.00	0.00	0.00	0.00

**Amount (LCY)**

Specifies the total amount in local currency (including VAT) that the journal line consists of.

..... DEFAULT						
in	Creditor No.	Document Amount	Amount	Amount (LCY)	Total Exported Amount	Bal. Account Type
		0.00	0.00	0.00	0.00	G/L Account

**Total Exported Amount**

Specifies the amount for the payment journal line that has been exported to payment files that are not canceled.

Document Amount	Amount	Amount (LCY)	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies Doc. Ty
0.00	0.00	0.00	0.00	G/L Account		
Open record "0.00"						

**Bal. Account Type**

Specifies the type of account that a balancing entry is posted to, such as BANK for a cash account.

Amount	Amount (LCY)	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. D
0.00	0.00	0.00	G/L Account				

**Bal. Account No.**

Specifies the number of the general ledger, customer, vendor, or bank account that the balancing entry is posted to, such as a cash account for cash purchases.

Amount	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Co
0.00	0.00	0.00	G/L Account				

**Applies-to Doc. Type**

Specifies the type of the posted document that this document or journal line will be applied to when you post, for example to register payment.

(LCY)	Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File
0.00	0.00	G/L Account						

**Applies-to Doc. No.**

Specifies the number of the posted document that this document or journal line will be applied to when you post, for example to register payment.

Total Exported Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
0.00	G/L Account							

**Applies-to Doc. Due Date**

Specifies the due date from the Applies-to Doc. on the journal line.

Amount	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies-to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
0.00	G/L Account							

### Correction

Specifies the entry as a corrective entry. You can use the field if you need to post a corrective entry to an account.

ted unit	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies- to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
.00	G/L Account					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Exported to Payment File

Specifies that the buying group journal line was exported to a buying group file.

ted unit	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies- to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
.00	G/L Account					<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### Has Payment Export Error

Specifies that an error occurred when you used the Export Payments to File function in the Payment Journal window.

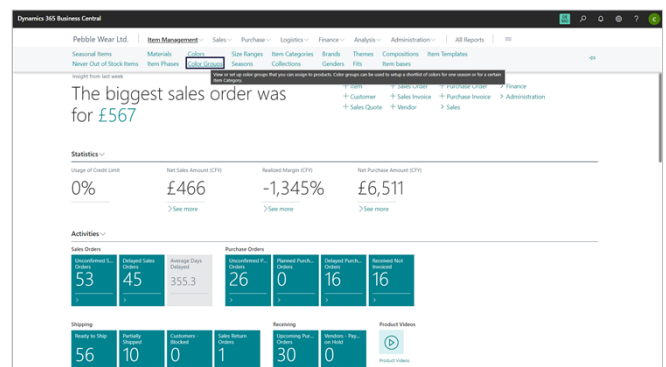
ted unit	Bal. Account Type	Bal. Account No.	Applies-to Doc. Type	Applies- to Doc. No.	Applies-to Doc. Due Date	Cor...	Exported to Payment File	Has Payment Export Error
.00	G/L Account					<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## 2. Item management

### 2.1. Item colors and sizes, matrix BC25

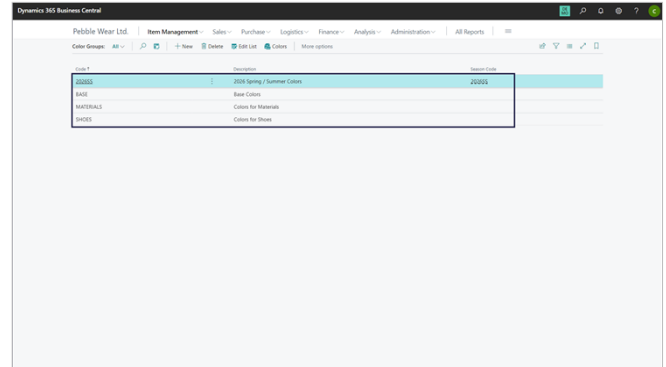
#### 2.1.1. Item Color Groups BC25

Color groups can be used to set up a shortlist of colors for a specific season or for a certain group of items, such as a category. A color group can be assigned to an item.

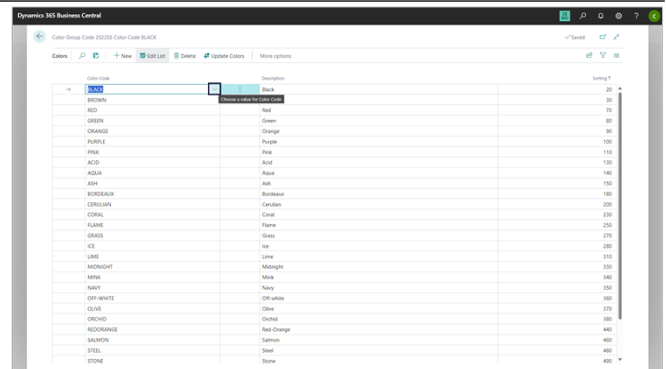


## K3 Pebblestone

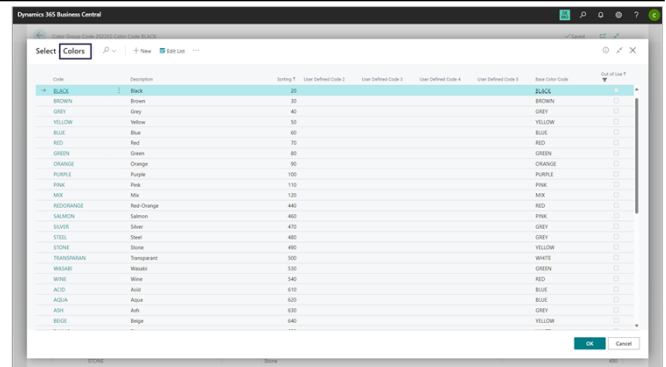
A color group can have selected colors assigned to it, along with a season code.



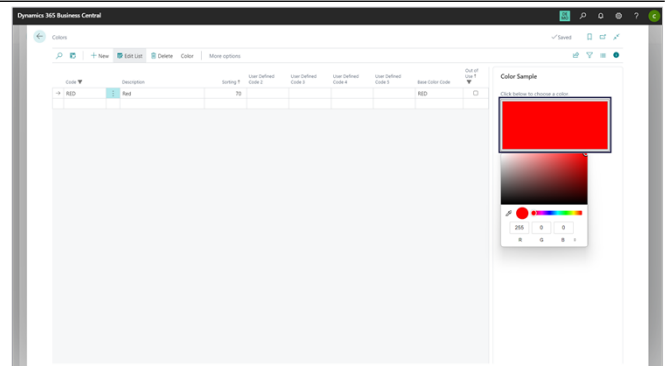
When adding colors to a color group, a sorting order is automatically generated, which can later be adjusted.



When adding a color to a color group, a color can be selected from the Colors group, where all colors are maintained.



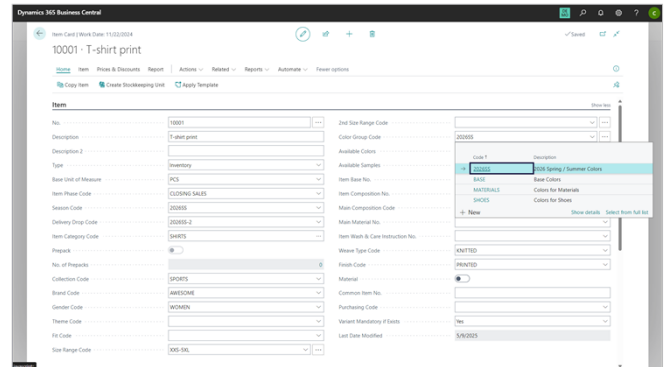
Each color can have a color sample linked to it.



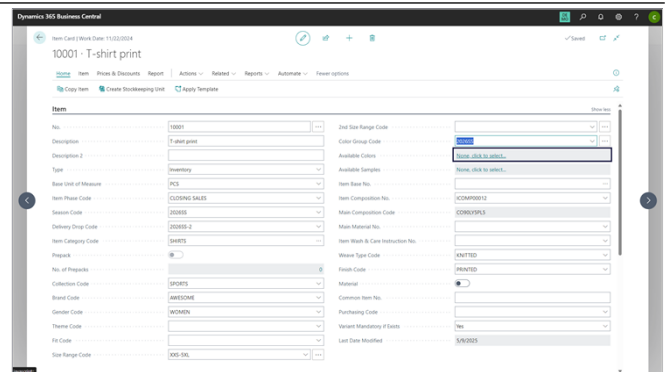


## 2.1.2. Item Colors BC25

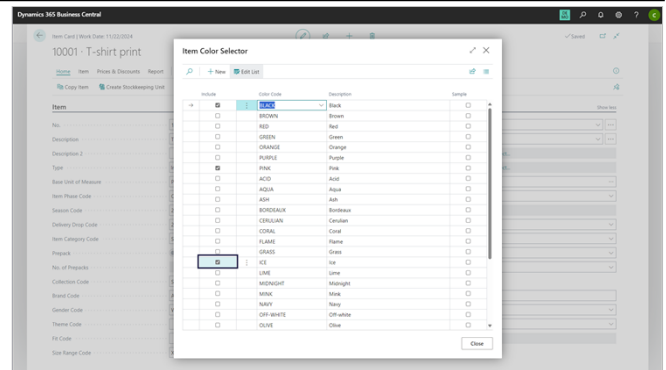
It is possible to assign a color group to an item.



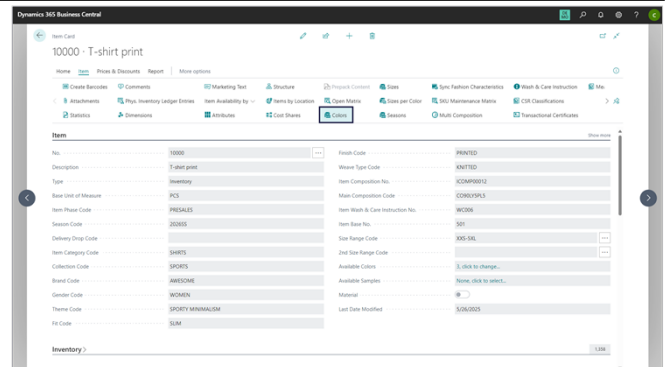
For the relevant item, you can select which colors from the group the item will be available in.



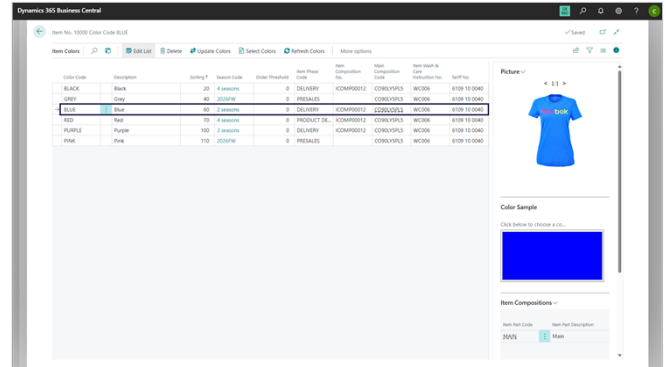
This can be done by selecting the desired colors within the color group.



The colors selected for the item can be accessed via the menu path: Item > Colors.

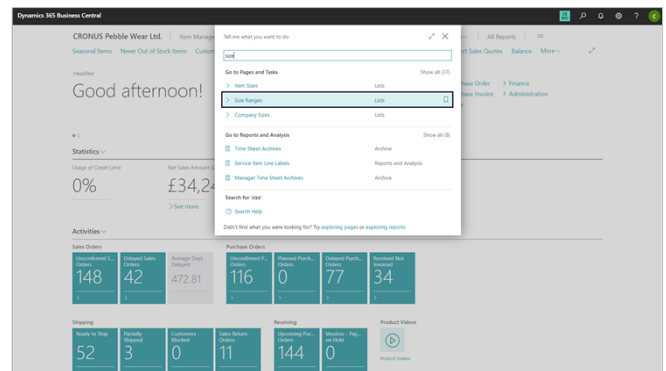


It is possible to configure different settings per color.

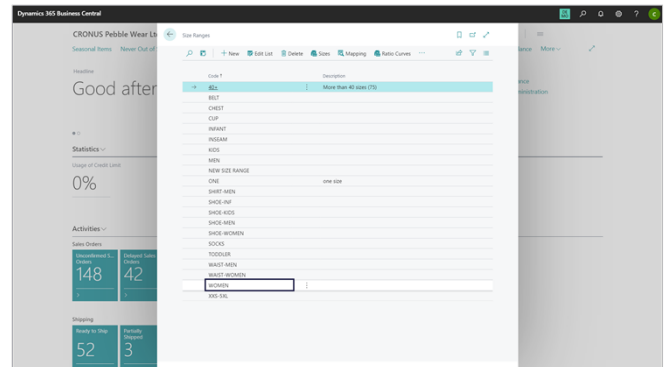


## 2.1.3. Item Size Ranges BC25

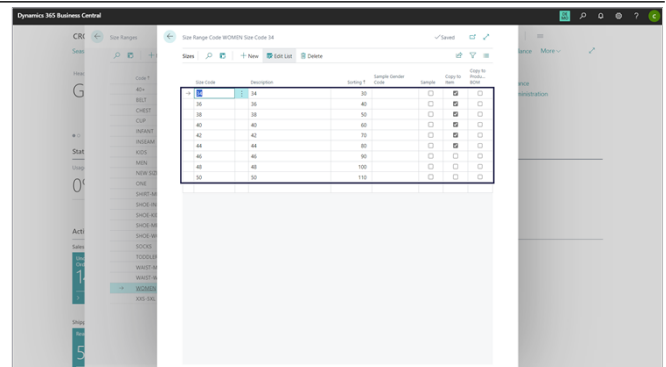
Navigate to Size Ranges.



Size Ranges can be used to set up a shortlist of sizes for a specific group of items, such as a category. A size range can be assigned to an item.

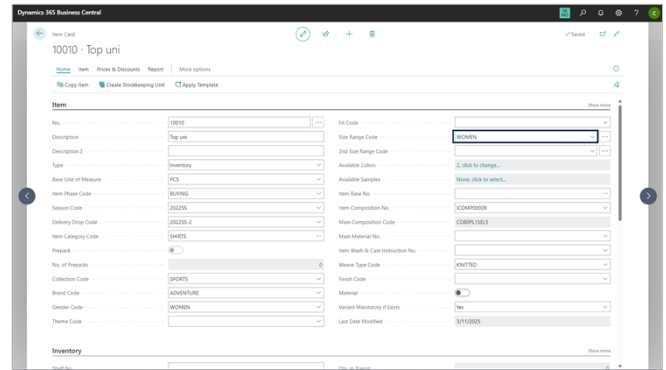


When adding sizes to a size range, a sorting order is automatically generated, which can later be adjusted. A size range can have selected sizes assigned to it, along with a sample gender code, an indicator for sample size, and options to copy the size to the item and/or production BOM.



## 2.1.4. Item Sizes BC25

It is possible to assign a size range to an item.



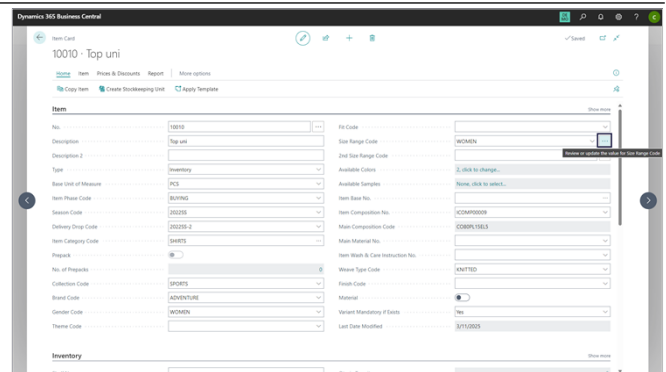
Item Card: 10010 - Top uni

Item

No.	10010	Fit Code	WOMEN
Description	Top uni	Size Range Code	
Description 2		2nd Size Range Code	
Type	Inventory	Available Colors	2, click to change...
Base Unit of Measure	PCS	Available Samples	None, click to select...
Item Phase Code	BUYING	Item Base No.	
Season Code	2022S	Item Composition No.	ICOMP0009
Delivery Drop Code	2022S-2	Main Composition Code	COMPL0005
Item Category Code	SHIRTS	Main Material No.	
Prepack		Item Wash & Care Instruction No.	
No. of Prepacks	8	Wash Type Code	UNITED
Collection Code	SPORTS	Finish Code	
Brand Code	ADVENTURE	Material	
Gender Code	WOMEN	Variant Mandatory Fields	Yes
Theme Code		Last Date Modified	5/15/2025

Inventory

For the relevant item, you can select which sizes from the group the item will be available in.



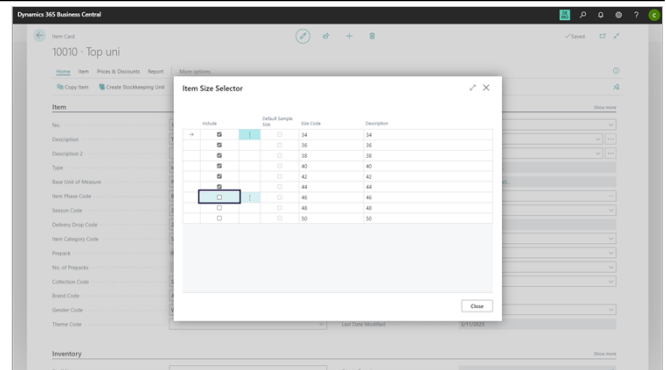
Item Card: 10010 - Top uni

Item

No.	10010	Fit Code	WOMEN
Description	Top uni	Size Range Code	
Description 2		2nd Size Range Code	
Type	Inventory	Available Colors	2, click to change...
Base Unit of Measure	PCS	Available Samples	None, click to select...
Item Phase Code	BUYING	Item Base No.	
Season Code	2022S	Item Composition No.	ICOMP0009
Delivery Drop Code	2022S-2	Main Composition Code	COMPL0005
Item Category Code	SHIRTS	Main Material No.	
Prepack		Item Wash & Care Instruction No.	
No. of Prepacks	8	Wash Type Code	UNITED
Collection Code	SPORTS	Finish Code	
Brand Code	ADVENTURE	Material	
Gender Code	WOMEN	Variant Mandatory Fields	Yes
Theme Code		Last Date Modified	5/15/2025

Inventory

This can be done by selecting the desired sizes within the size range.



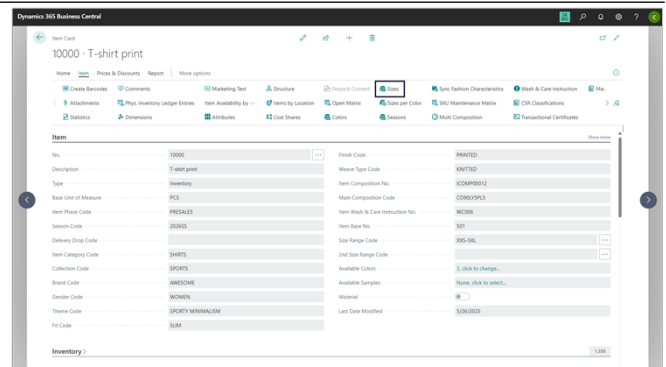
Item Card: 10010 - Top uni

Item Size Selector

Item	Default Sample	Size	Description
<input checked="" type="checkbox"/>		34	34
<input checked="" type="checkbox"/>		36	36
<input checked="" type="checkbox"/>		38	38
<input checked="" type="checkbox"/>		40	40
<input checked="" type="checkbox"/>		42	42
<input checked="" type="checkbox"/>		44	44
<input checked="" type="checkbox"/>		46	46
<input checked="" type="checkbox"/>		48	48
<input checked="" type="checkbox"/>		50	50

Close

The sizes selected for the item can be accessed via the menu path: Item > Sizes.



Item Card: 10000 - T-shirt print

Item

No.	10000	Fit Code	WOMEN
Description	T-shirt print	Size Range Code	
Description 2		2nd Size Range Code	
Type	Inventory	Available Colors	2, click to change...
Base Unit of Measure	PCS	Available Samples	None, click to select...
Item Phase Code	PRESALES	Item Base No.	
Season Code	2022S	Item Composition No.	ICOMP0009
Delivery Drop Code	2022S-2	Main Composition Code	COMPL0005
Item Category Code	SHIRTS	Main Material No.	
Collection Code	SPORTS	Item Wash & Care Instruction No.	
Brand Code	ADVENTURE	Wash Type Code	UNITED
Gender Code	WOMEN	Finish Code	
Theme Code	SPORTY MINIMALISM	Material	
Fit Code	SLM	Variant Mandatory Fields	Yes
		Last Date Modified	5/16/2025

Inventory

Inventory 10000 Size Code

Items Data [Edit List](#) [Delete](#) [Select Data](#) [Refresh Data](#) More options

Size Range Code T	Size Code	Description	Unit	Default Storage Unit	Unit Desc. Printing Control	Unit Weight	Net Weight	Last Date Modified	Last Time Modified
XSS-SAL	XSS	XSS	10	□	STANDARD	0	0	6/5/2021	9:27:09 PM
XSS-SAL	XS	XS	20	□	STANDARD	0	0	6/5/2021	9:27:09 PM
XSS-SAL	S	S	30	□	STANDARD	0	0	6/5/2021	9:27:09 PM
XSS-SAL	M	M	40	□	STANDARD	0	0	6/5/2021	9:27:09 PM
XSS-SAL	L	L	50	□	STANDARD	0	0	6/5/2021	9:27:09 PM
XSS-SAL	XL	XL	60	□	STANDARD	0	0	6/5/2021	9:27:09 PM
XSS-SAL	XXL	XXL	70	□	STANDARD	0	0	6/5/2021	9:27:09 PM

**Dynamics 365 Business Central**

Size Ranges

+ New + Add List + Delete + Sizes Mapping **Sales Counter** More options

Code T	Description
40+	More than 40 sizes (7)
BELT	
CHEST	
CLIP	
HONANT	
INGRAM	
KIDS	
MEN	
NEW SIZE RANGE	
ONE	one size
SHIRT MEN	
SHOE INF	
SHOE KIDS	
SHOE MEN	
SHOE WOMEN	
SOCKS	
TODDLER	
WASHT MEN	
WASHT WOMEN	
→ <b>ITEMS</b>	1
400-100	

WORKITEM: RCU1
Save
Print
Refresh
Filter
Columns
More options

Size Range Ratio Curves
+ New
EDIT LIST
Online
Ratio Curve Sizes

Code T	Description	Quantity
→ RCU1	RCU1	16
RCU2	RCU2	12

[illegible]

Each size range can have multiple ratio curves, each with different sets of quantities per size.

Code	Total	34	36	38	40	42	44	46	48	50
RC02	14		2	4	6	4	2			

Once a size range is assigned to an item, the associated ratio curves are included as well.

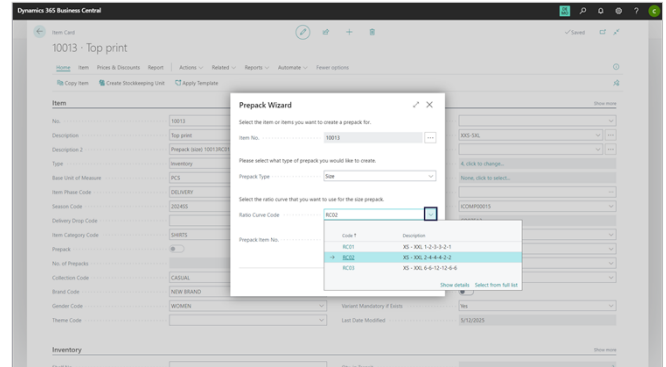
## 2.1.6. Item Prepack Sizes BC25

From an item with solid sizes, it is possible to create a prepack with a size range for this item by using the Create Prepack wizard function.

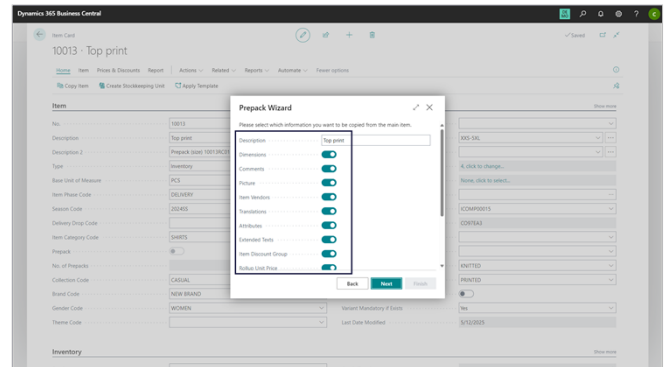
When creating a number of items across a size range, Size must be selected as the Prepack Type.

## K3 Pebblestone

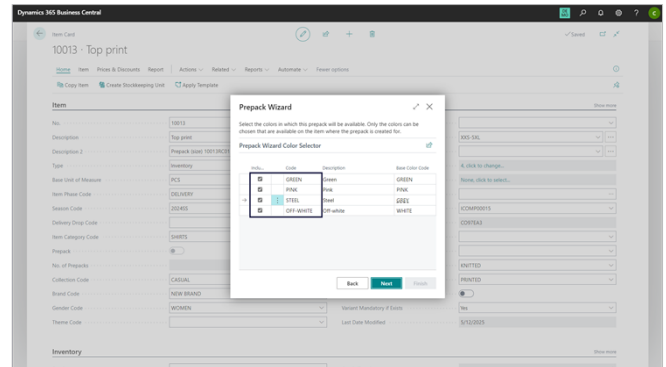
By selecting a ratio curve, the quantity distribution across the size range is determined. For the new prepack item to be created, a new item number will be generated, which also includes the ratio curve code.



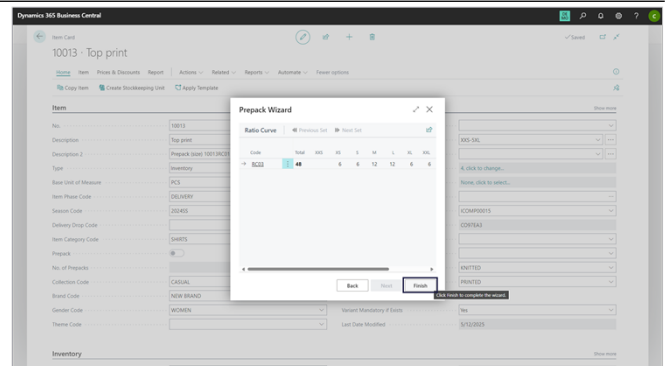
Characteristics of the main item can be copied to the new prepack item by enabling the desired options.



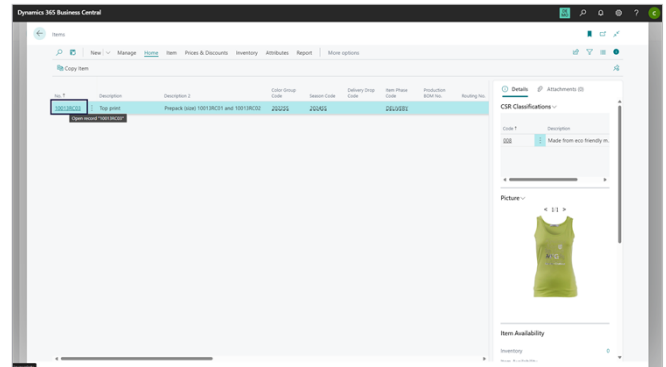
It is possible to specify in which colors the new prepack item should be available.



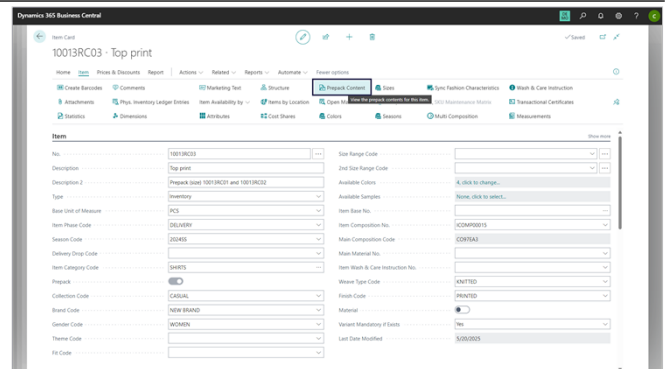
The prepack content is displayed.



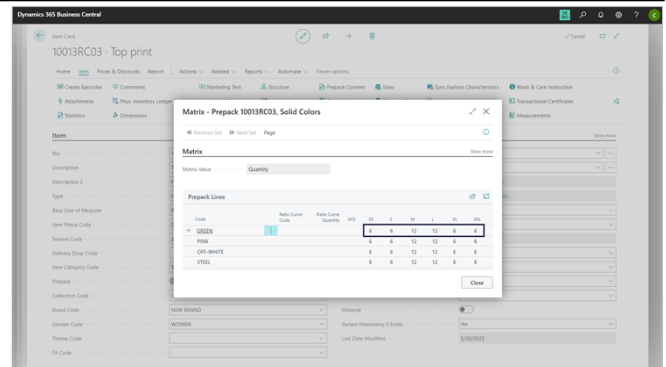
The newly created prepack item is displayed.



The prepack content can always be displayed for the newly created prepack item.

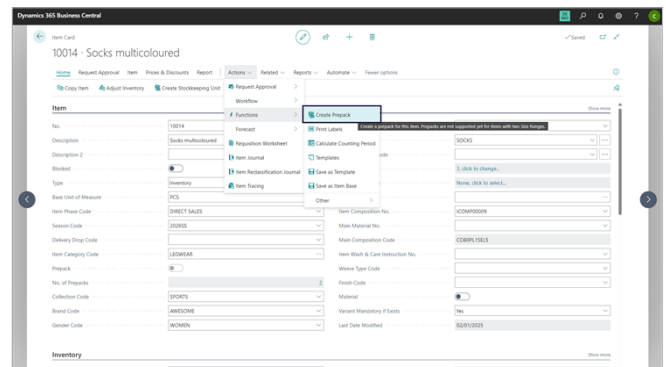


For the selected colors, the quantities per size within the chosen size range are shown.



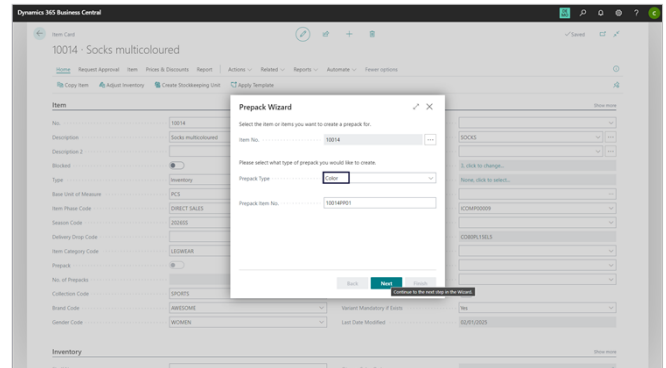
## 2.1.7. Item Prepack Colors BC25

From an item with solid sizes, it is possible to create a prepack over different colors for this item by using the Create Prepack wizard function.



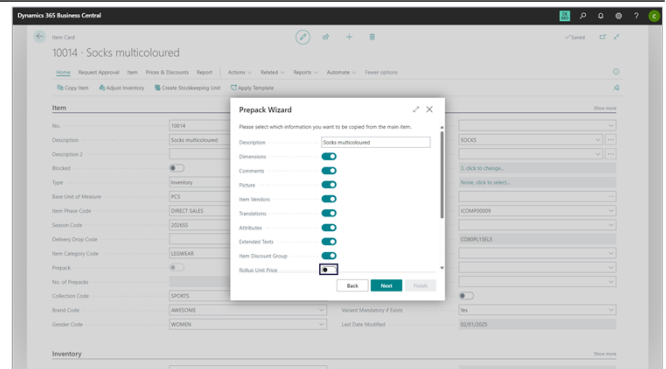


When creating a number of items across different colors, Color must be selected as the Prepack Type. For the new prepack item to be created, a new item number will be generated, extended with a PP code.



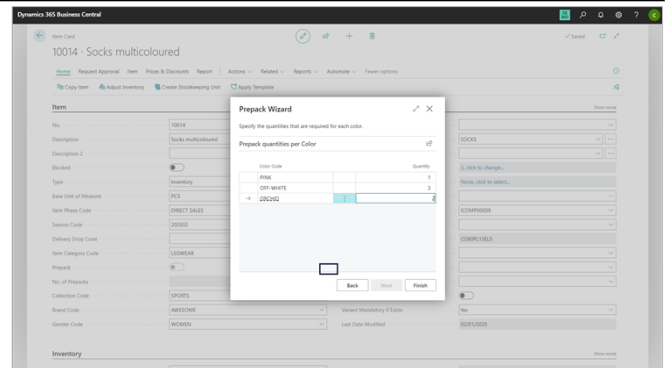
The screenshot shows the 'Prepack Wizard' dialog in Dynamics 365 Business Central. The 'Prepack Type' is set to 'Color'. The 'Prepack Item No.' is 10014PP001. The background shows the 'Item Card' for '10014 - Socks multicoloured'.

Characteristics of the main item can be copied to the new prepack item by enabling the desired options.



The screenshot shows the 'Prepack Wizard' dialog with the 'Copy from main item' checkbox checked. Various options are enabled, including 'Dimensions', 'Comments', 'Parties', 'Item Variations', 'Translations', 'Attributes', 'Extended Texts', 'Item Discount Group', and 'Bulk Unit Price'.

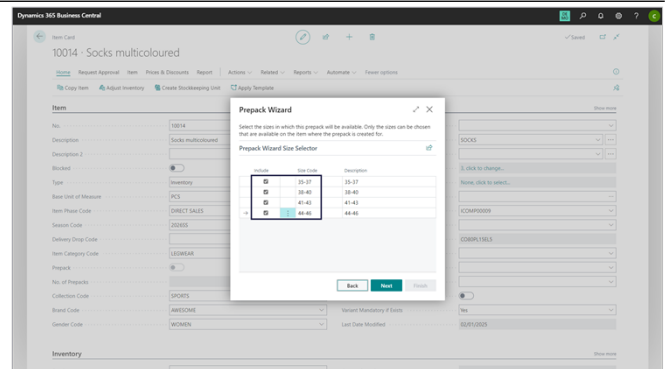
It is possible to specify the quantities per color included in a prepack for a specific size.



The screenshot shows the 'Prepack Wizard' dialog with the 'Specify quantities per color' checkbox checked. A table shows quantities for different colors and sizes:

Color Code	Quantity
PP00	1
000000	1
000000	1

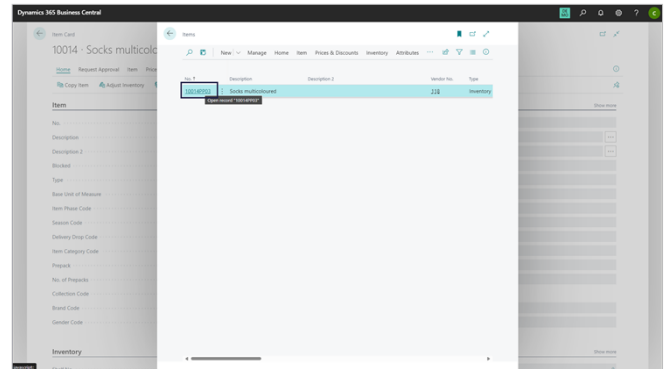
It is possible to specify in which sizes the new prepack item should be available.



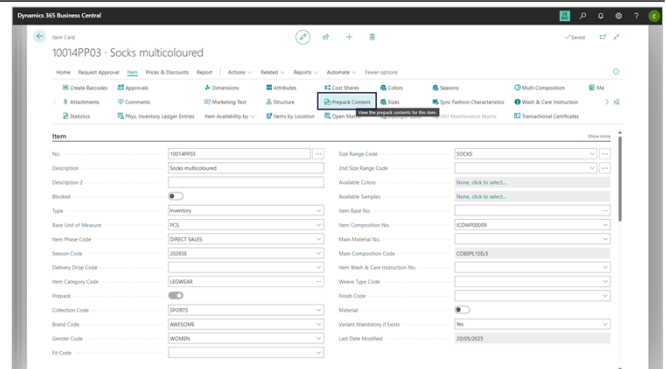
The screenshot shows the 'Prepack Wizard' dialog with the 'Specify sizes' checkbox checked. A table shows sizes and their descriptions:

Size Code	Description
35-37	35-37
38-40	38-40
41-43	41-43
44-46	44-46

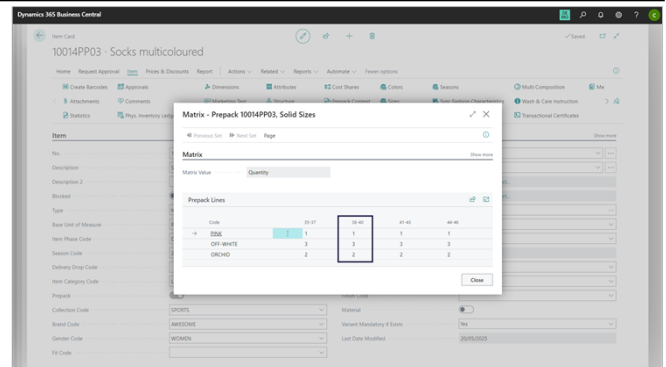
The newly created prepack item is displayed.



The prepack content can always be displayed for the newly created prepack item.

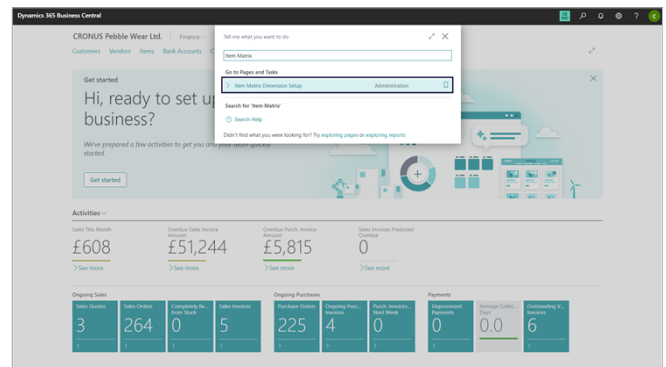


For the selected sizes, the quantities per color are shown.



## 2.1.8. Item Matrix dimensions setup BC

Navigate to Item Matrix Dimension Setup.



## K3 Pebblestone

### 1. Create Configurable Variant Codes

Enables the creation of meaningful variant codes based on item color and size combinations. A maximum of 10 characters is available to construct the variant code. These 10 characters can be divided between color, separator, first size, and optionally a second size.

### 2. Positions for Color

Defines how many characters within the variant code are used for the color value.

### 3. Separator

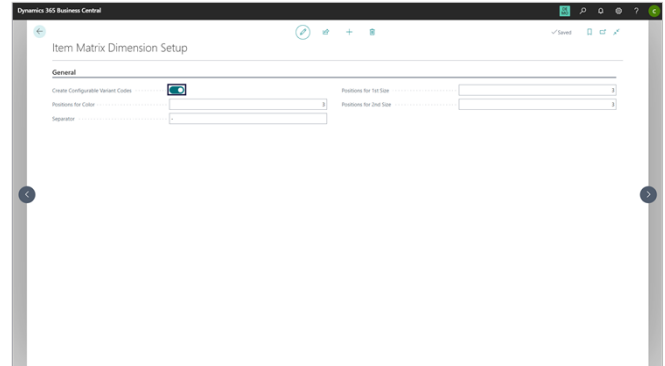
Specifies the character used to separate the color and size parts in the variant code.

### 4. Positions for 1st Size

Defines how many characters are allocated for the first size value in the variant code.

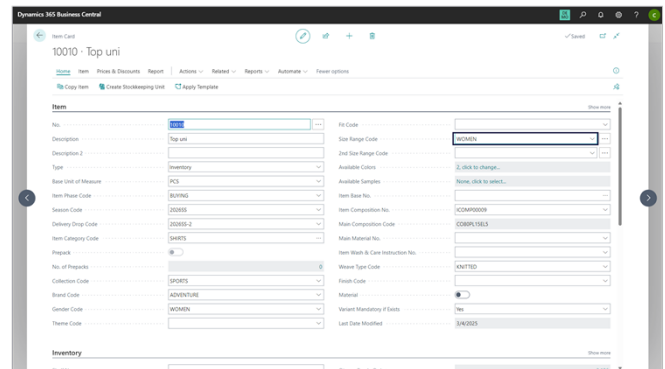
### 5. Positions for 2nd Size

Defines how many characters are used for the second size value. If no second size code exists, these characters are added to the first size value instead.

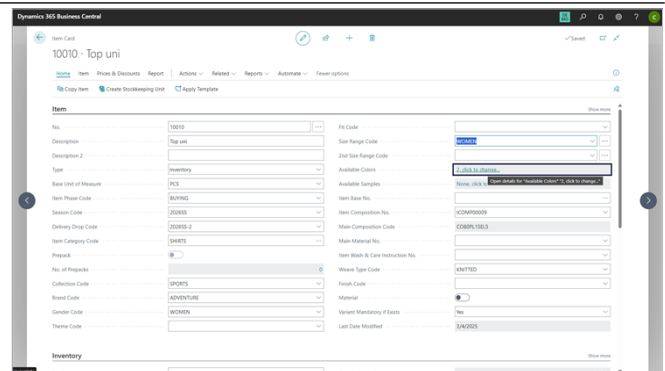


## 2.1.9. Item Matrix BC25

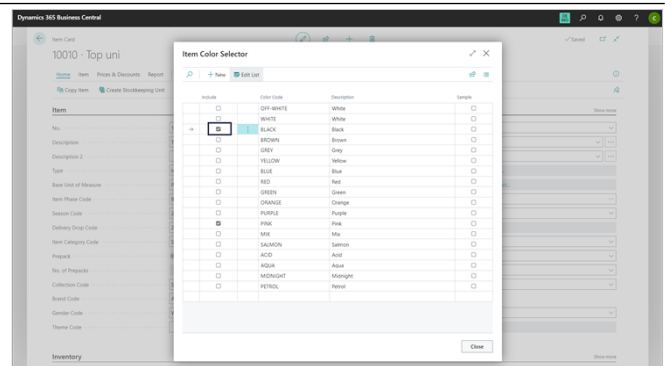
It is possible to link a predefined size range to an item. All active sizes in the selected size range are applied to the item.



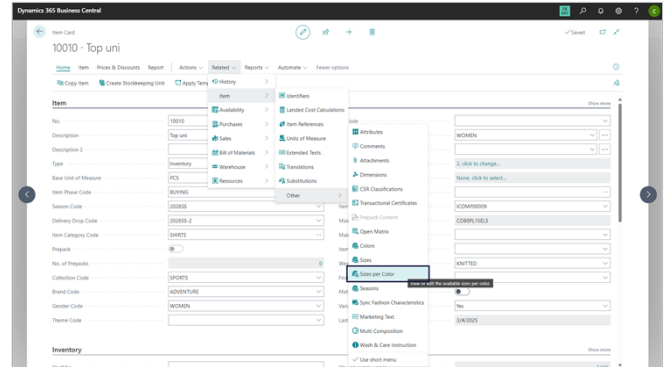
It is possible to link a predefined color group to an item and select specific colors from it. Alternatively, it is also possible to select individual colors without using a color group and link them to an item.



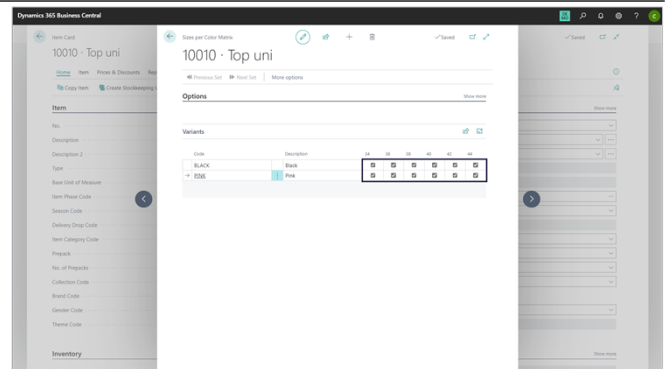
It is possible to select colors, unselect them if they haven't been used yet, or add additional colors at a later stage.



The selected sizes and colors can be displayed in a matrix on the item card by selecting Related > Item > Other > Sizes per Color from the menu.



Check boxes in the matrix indicate which sizes and colors have been selected.

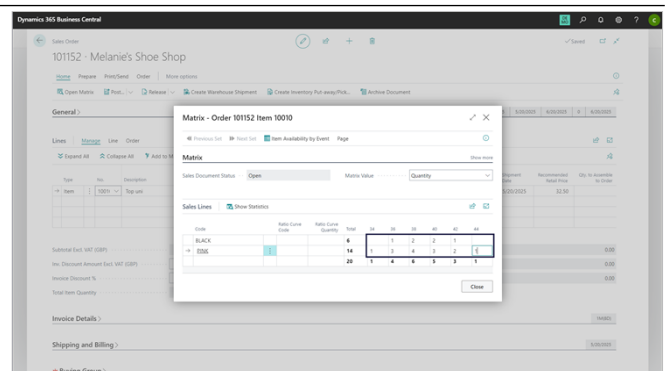


## 2.1.10. Item Matrix in sales order BC25

In a sales order, the use of multiple types of matrices is possible.

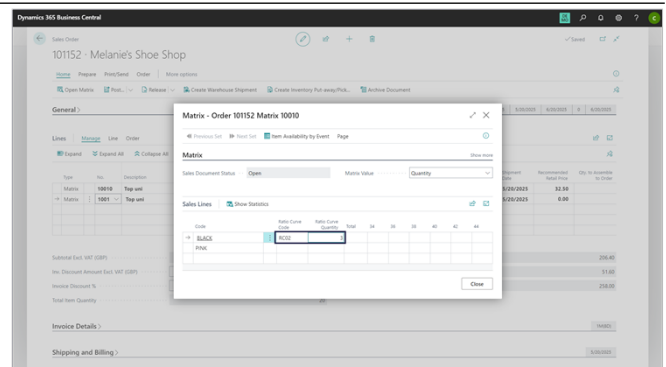
Standard matrix:

The simplest matrix consists of individual sizes combined with the colors selected for the item.

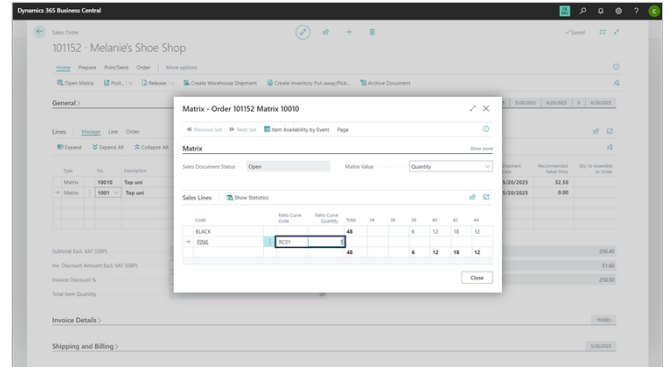


Standard matrix with ratio curve as input aid:

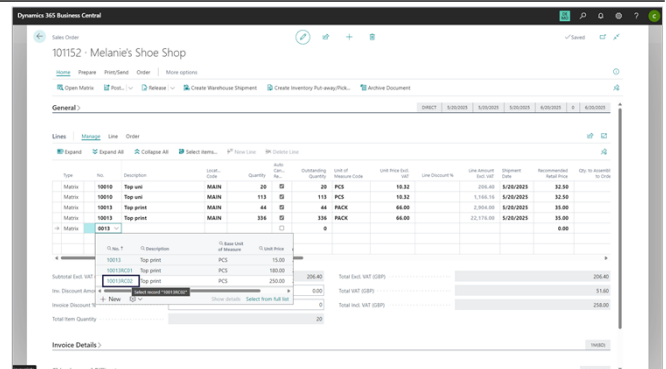
For an item with predefined ratio curves, the ratio curve code and ratio curve quantity can be entered as input aid, after which the system will convert this into individual sizes.



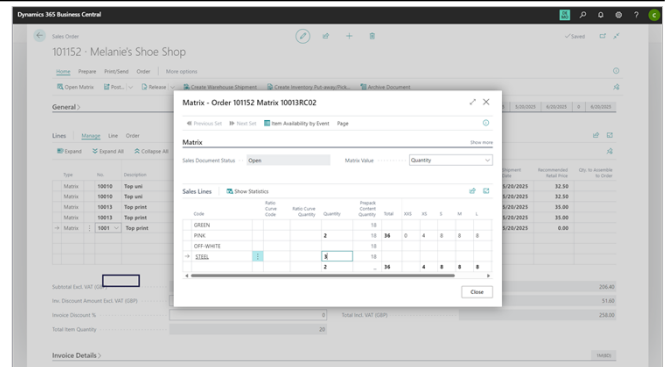
It is possible to select a different or the same ratio curve for each color.



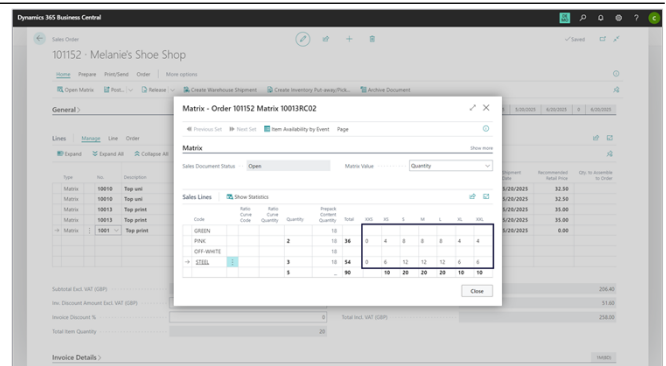
Matrix for a standalone prepack item with a predefined ratio curve:  
In addition to a regular item, a sales order line can also be created for a standalone prepack item with a predefined ratio curve.



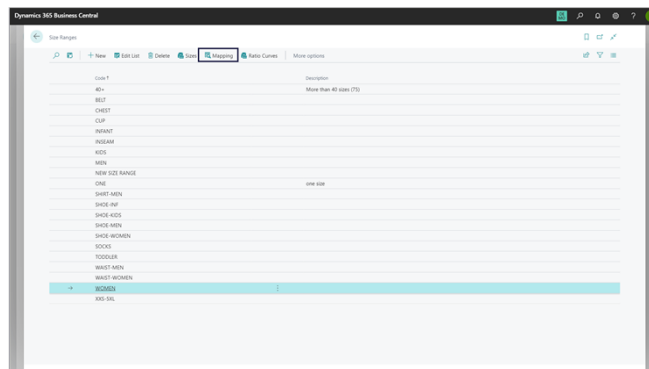
For a stand alone prepack item with a predefined ratio curve, the number of prepacks can be entered in the matrix under the Quantity column.



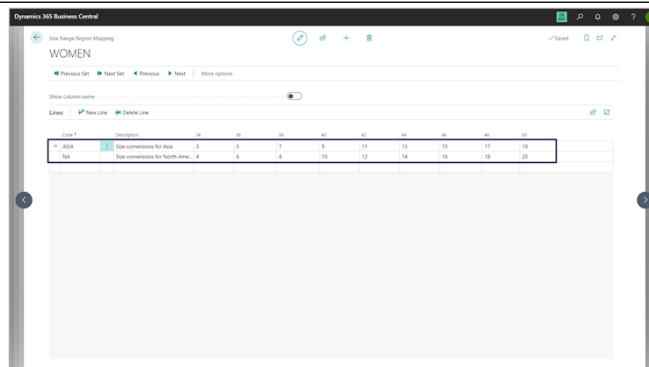
Based on the entered quantity of the prepack item, the system will convert this into individual sizes.



Navigate to Size Ranges. Select the correct size range and click on Mapping.

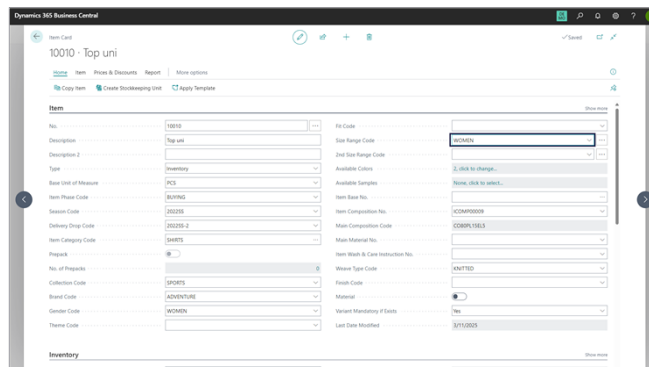


Create or select a Size Range Region Mapping code. Enter the foreign/external size code per size for the selected region mapping code. Each size range can have multiple size range region mapping codes, each with different foreign size codes per size.



Create or select the correct Size Range Region Mapping code.

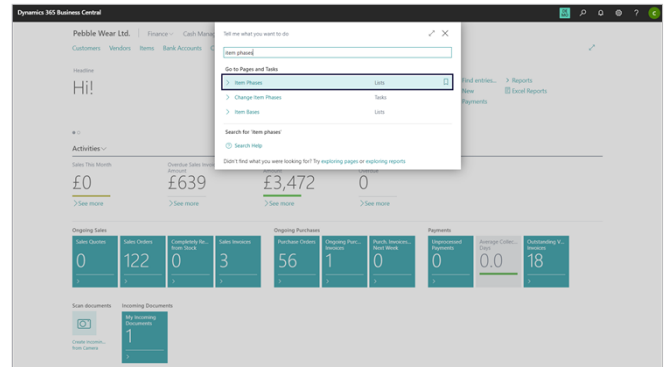
Once a size range is assigned to an item, the associated region mapping codes are included as well.



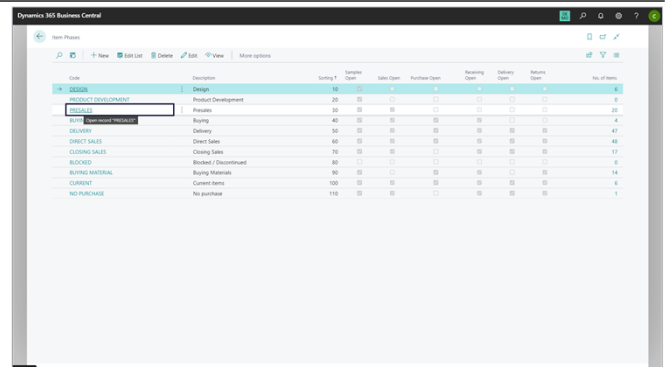
## 2.2. Item card, characteristic fashion fields BC25

### 2.2.1. Item Phases BC25

Navigate to Item Phases

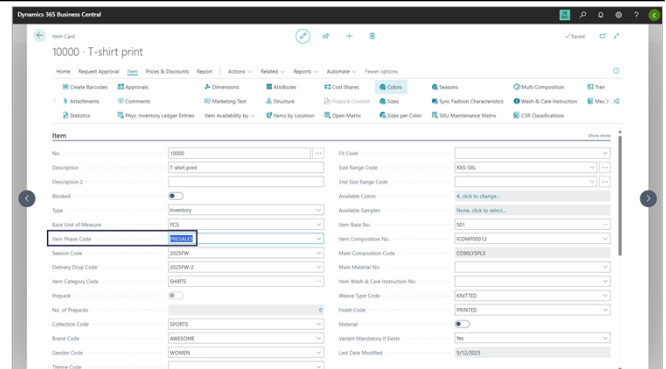


It is possible to create multiple item phases and specify which subprocesses are allowed per phase. If none of the subprocesses are allowed—meaning all options are unchecked—the item phase will block all listed processes. For each item phase, it is possible to see how many items it is assigned to and which items these are.

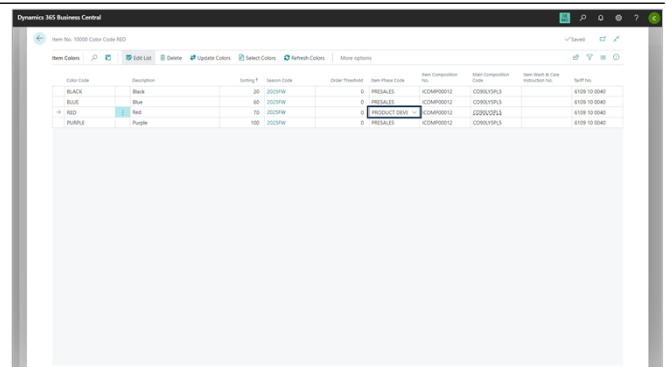


Code	Description	No. of Items
DESIGN	Design	16
PRODUCT DEVELOPMENT	Product Development	26
PRODUCTION	Production	30
BUYING	Buying	40
BUYING MATERIALS	Buying Materials	50
BUYING	Buying	60
BUYING MATERIALS	Buying Materials	70
BUYING	Buying	80
BUYING MATERIALS	Buying Materials	90
BUYING	Buying	100
BUYING MATERIALS	Buying Materials	110

On the item card, the correct item phase for that item can be selected. This will normally apply to all colors and variants, but you can also vary it per color or variant if needed.



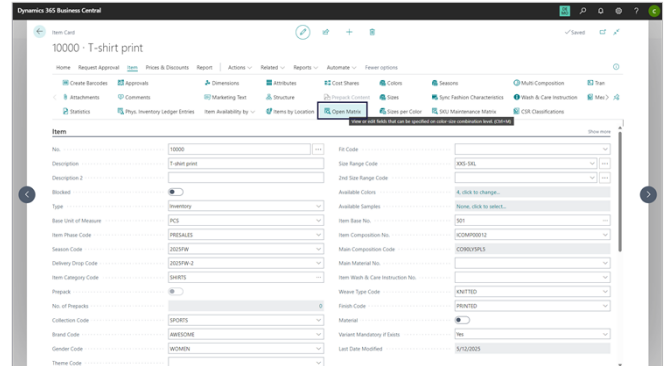
An item phase can be selected for each color.



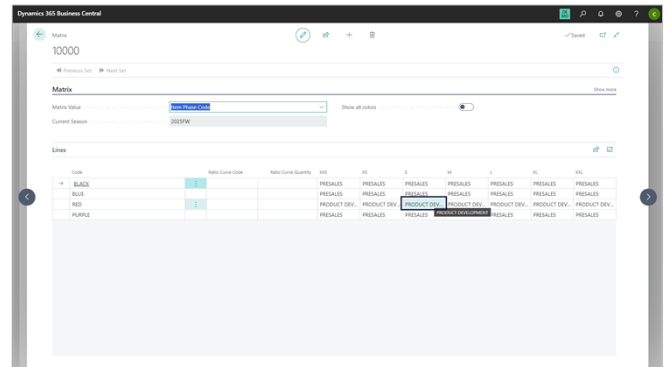
Color Code	Description	Item Phase Code
BLACK	Black	DESIGN
BLUE	Blue	DESIGN
RED	Red	DESIGN
PURPLE	Purple	DESIGN



By selecting Open Matrix on the item card,

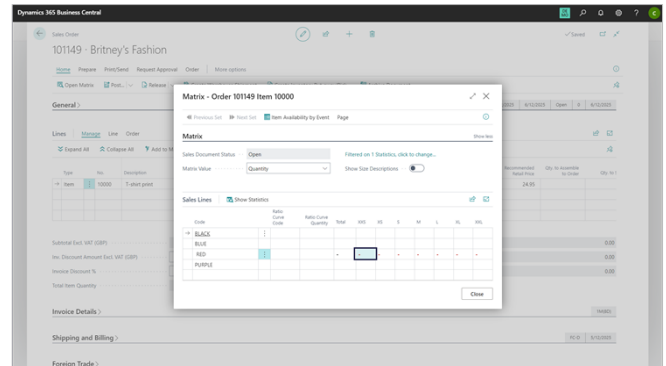


and choosing Item Phase Code in Matrix Value, it's possible to assign the Item Phase code per variant.

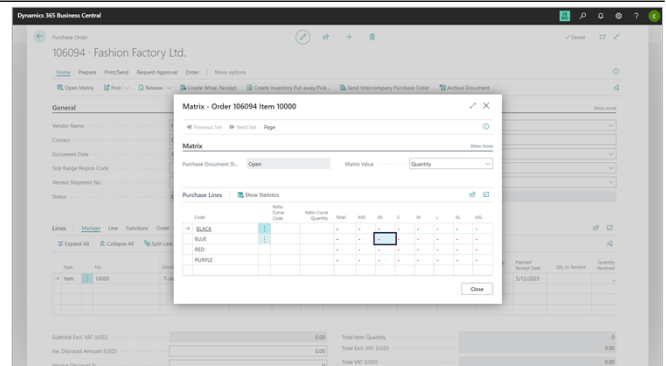


Code	Matrix Value	Matrix Quantity	XS	S	M	L	XL	XXL
BLACK	PRESALES	1	PRESALES	PRESALES	PRESALES	PRESALES	PRESALES	PRESALES
BLUE	PRESALES	1	PRESALES	PRESALES	PRESALES	PRESALES	PRESALES	PRESALES
RED	PRODUCT DEV.	1	PRODUCT DEV.	PRODUCT DEV.	PRODUCT DEV.	PRODUCT DEV.	PRODUCT DEV.	PRODUCT DEV.
PURPLE	PRESALES	1	PRESALES	PRESALES	PRESALES	PRESALES	PRESALES	PRESALES

In the sales order, it is determined based on the item phase code per item variant whether that specific variant is open or blocked.

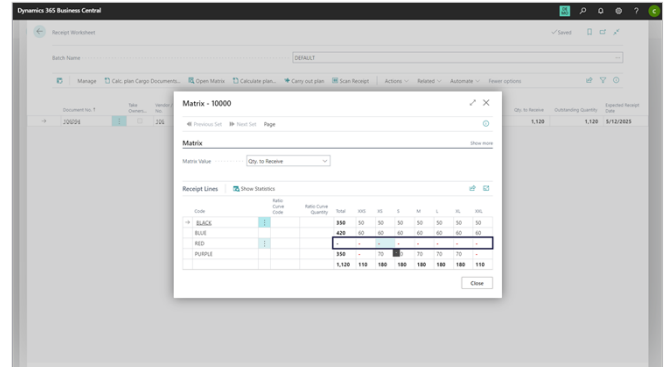


In the purchase order, it is determined based on the item phase code per item variant whether that specific variant is open or blocked.

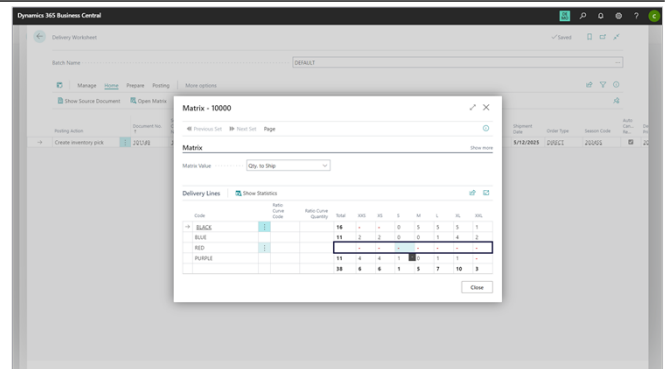


## K3 Pebblestone

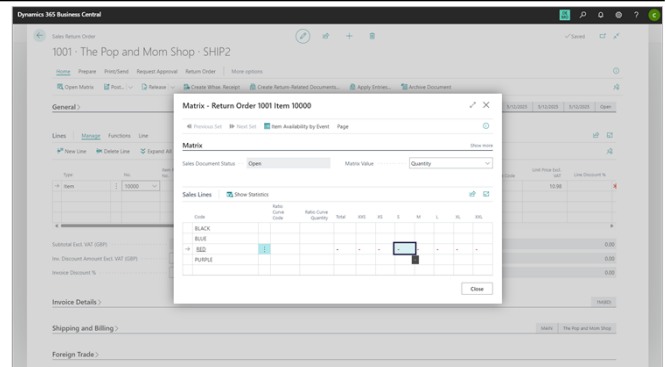
During receipt, it is determined based on the item phase code per item variant whether that specific variant is open or blocked.



During delivery, it is determined based on the item phase code per item variant whether that specific variant is open or blocked.

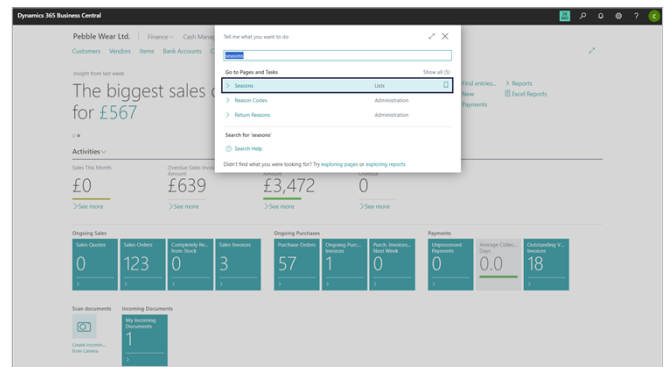


In the sales return order and purchase return order, it is determined based on the item phase code per item variant whether that specific variant is open or blocked.



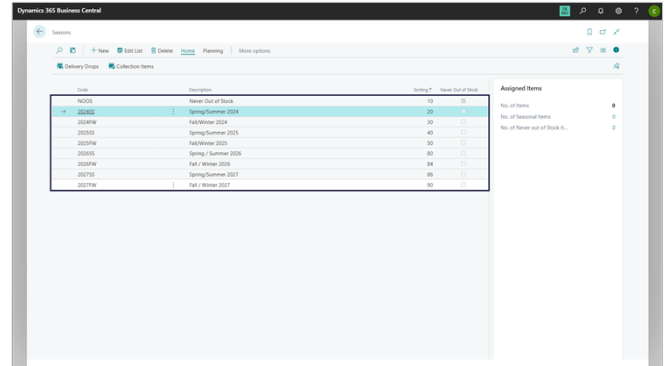
## 2.2.2. Item Seasons BC25

Navigate to Item Phases



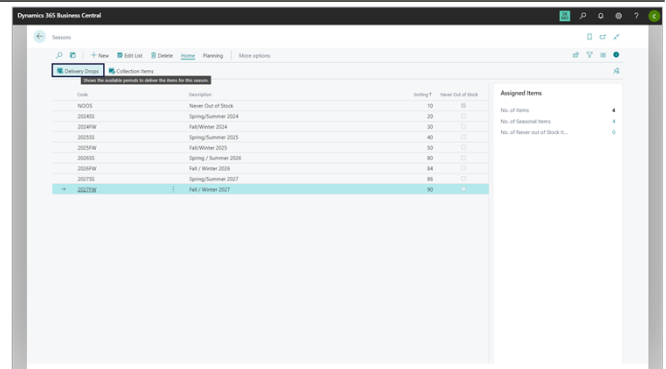
## K3 Pebblestone

It is possible to create multiple seasons.  
For each season, it is possible to see how many items it is assigned to and which items these are.



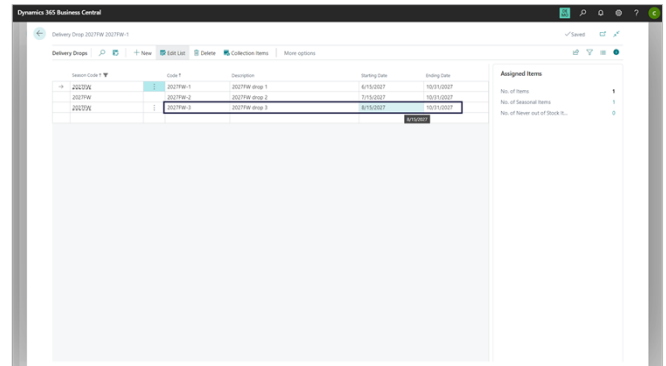
Code	Description	Starting Date	Ending Date
160000	Newest Out of Stock	16	16
2024WS	Spring/Summer 2024	20	20
2024FW	Fall/Winter 2024	20	20
2025SS	Spring/Summer 2025	40	40
2025FW	Fall/Winter 2025	50	50
2026SS	Spring/Summer 2026	80	80
2026FW	Fall/Winter 2026	84	84
2027SS	Spring/Summer 2027	86	86
2027FW	Fall/Winter 2027	90	90

Per season, multiple Delivery Drops can be added.



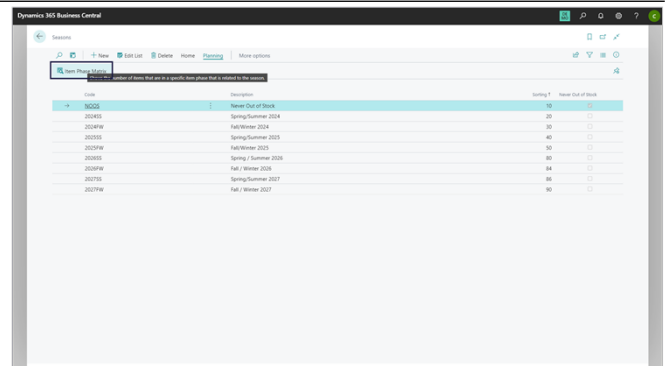
Code	Description	Starting Date	Ending Date
160000	Newest Out of Stock	16	16
2024WS	Spring/Summer 2024	20	20
2024FW	Fall/Winter 2024	20	20
2025SS	Spring/Summer 2025	40	40
2025FW	Fall/Winter 2025	50	50
2026SS	Spring/Summer 2026	80	80
2026FW	Fall/Winter 2026	84	84
2027SS	Spring/Summer 2027	86	86
2027FW	Fall/Winter 2027	90	90

Per delivery drop, a starting date and ending date can be set.



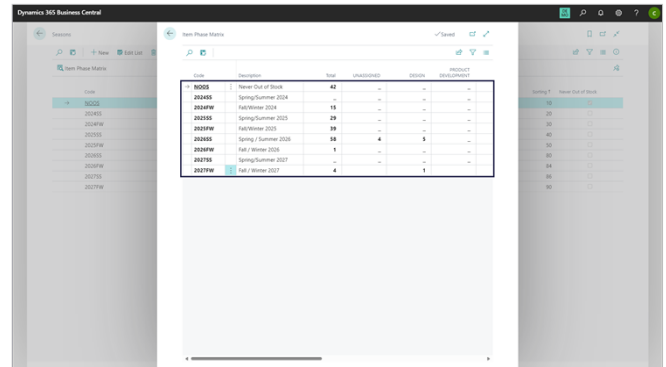
Code	Description	Starting Date	Ending Date
2027WS	Spring/Summer 2027	86	86
2027FW	Fall/Winter 2027	90	90

Under Planning > Item Phase Matrix,



Code	Description	Starting Date	Ending Date
160000	Newest Out of Stock	16	16
2024WS	Spring/Summer 2024	20	20
2024FW	Fall/Winter 2024	20	20
2025SS	Spring/Summer 2025	40	40
2025FW	Fall/Winter 2025	50	50
2026SS	Spring/Summer 2026	80	80
2026FW	Fall/Winter 2026	84	84
2027SS	Spring/Summer 2027	86	86
2027FW	Fall/Winter 2027	90	90

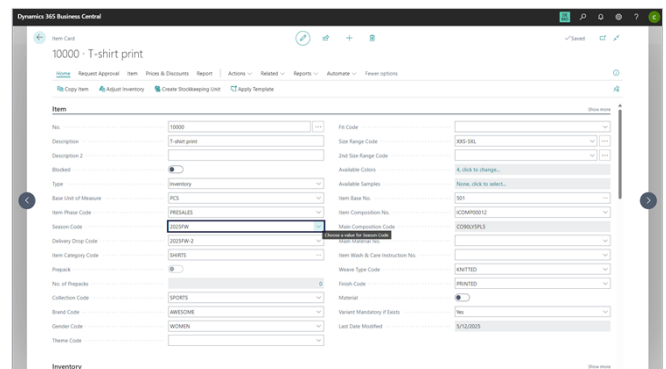
you can find an overview matrix displaying all Seasons and Item Phases.



Code	Description	Total	UNASSIGNED	OPEN	CLOSED
10000	Newest Out of Stock	42	-	-	-
2024WS	Spring/Summer 2024	-	-	-	-
2024FW	Fall/Winter 2024	15	-	-	-
2025WS	Spring/Summer 2025	29	-	-	-
2025FW	Fall/Winter 2025	39	-	-	-
2026WS	Spring/Summer 2026	16	4	5	-
2026FW	Fall/Winter 2026	1	-	-	-
2027WS	Spring/Summer 2027	-	-	-	-
2027FW	Fall/Winter 2027	4	-	1	-

### 2.2.2.1. Season on item card

On the item card, you can select a season during which the item can be sold.



Item Card: 10000 - T-shirt print

Season Code: 2025FW

Delivery Drop Code: 2025FW-2

Item Category Code: SPORTS

Brand Code: AWESOME

Gender Code: WOMEN

Theme Code: [empty]

Fit Code: [empty]

Size Range Code: [empty]

2nd Size Range Code: [empty]

Available Colors: [empty]

Available Samples: [empty]

Item Base No.: [empty]

Item Composition No.: [empty]

Main Composition Code: [empty]

Main Material No.: [empty]

Item Wash & Care Instruction No.: [empty]

Wash Type Code: [empty]

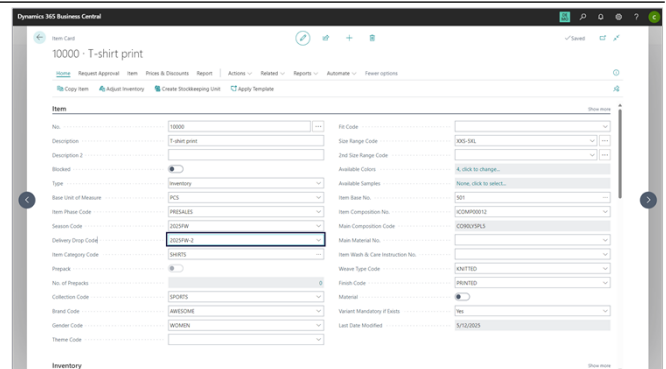
Fabric Code: [empty]

Material: [empty]

Variant Mandatory if Exists: [empty]

Last Date Modified: 5/12/2025

On the item card, you can select one of the delivery drops that were created under the corresponding season.



Item Card: 10000 - T-shirt print

Season Code: 2025FW

Delivery Drop Code: 2025FW-2

Item Category Code: SPORTS

Brand Code: AWESOME

Gender Code: WOMEN

Theme Code: [empty]

Fit Code: [empty]

Size Range Code: [empty]

2nd Size Range Code: [empty]

Available Colors: [empty]

Available Samples: [empty]

Item Base No.: [empty]

Item Composition No.: [empty]

Main Composition Code: [empty]

Main Material No.: [empty]

Item Wash & Care Instruction No.: [empty]

Wash Type Code: [empty]

Fabric Code: [empty]

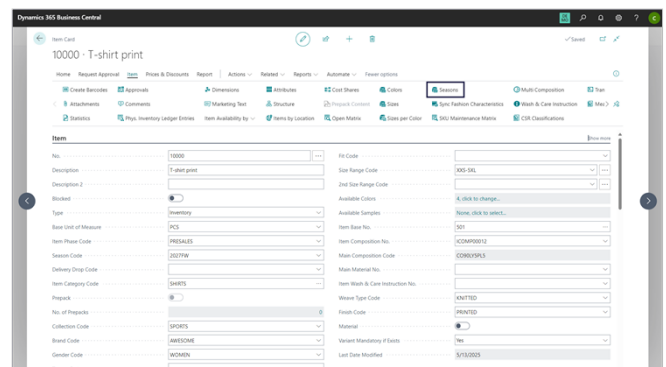
Material: [empty]

Variant Mandatory if Exists: [empty]

Last Date Modified: 5/12/2025

### 2.2.2.1.1. Carry over items

From the item card, you can select the menu option Seasons.



Item Card: 10000 - T-shirt print

Season Code: 2025FW

Delivery Drop Code: 2025FW-2

Item Category Code: SPORTS

Brand Code: AWESOME

Gender Code: WOMEN

Theme Code: [empty]

Fit Code: [empty]

Size Range Code: [empty]

2nd Size Range Code: [empty]

Available Colors: [empty]

Available Samples: [empty]

Item Base No.: [empty]

Item Composition No.: [empty]

Main Composition Code: [empty]

Main Material No.: [empty]

Item Wash & Care Instruction No.: [empty]

Wash Type Code: [empty]

Fabric Code: [empty]

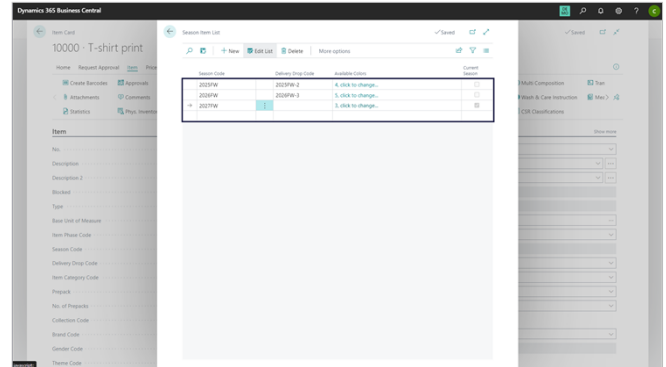
Material: [empty]

Variant Mandatory if Exists: [empty]

Last Date Modified: 5/12/2025

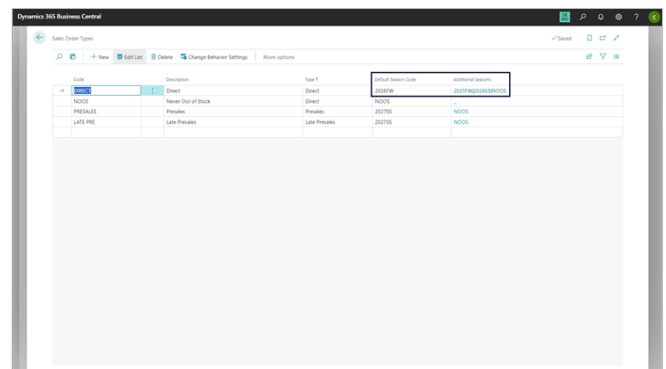
## K3 Pebblestone

When an item is successful, it may become a Carry-over item, meaning it is part of more than one season. Different seasons and delivery drops can be attached at both item and colour level. K3 Pebblestone supports this and ensures that the various seasons are correctly linked to the item and its colours.

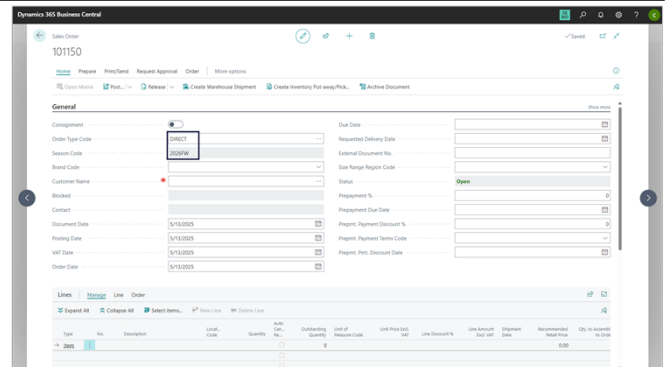


### 2.2.2.2. Season on sales order

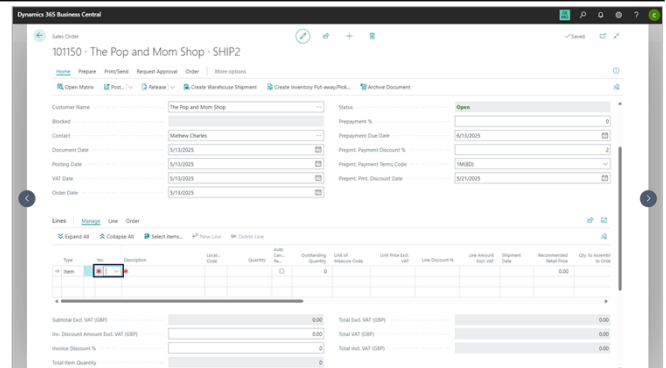
When defining the sales order types, the applicable default season can be set. Upon selecting the order type on the sales order header, this default season is applied to the header. Additional seasons can also be specified.



Upon selecting the order type on the sales order header, the defined default season is applied to the header.



Using both the default season and the additional seasons defined for the order type, a filter is applied to the sales order lines. As a result, only items belonging to these season(s) can be selected.



### 2.2.3. Carry Over Items BC25

When an item is successful, it may become a carry-over item, meaning it is included in more than one season. Different seasons can be assigned at both item and color level, ensuring that each season is properly linked to the relevant item and color.

[illegible]

**Dynamics MII Business Central**

Item Card    10000 - T-shirt print

Home    Sales    Purchase & Discounts    Report    More options

Create Barcode    Marketing Tool    Structure    Track Product Cost    Taxes    Item Fashion Characteristics    Wash & Care Instructions    New

Attachments    Phys Inventory Larger Entries    Item Availability by ...    Items by Location    Edit Master    Size per Color    MCO Maintenance Matrix    CRK Classifications

Statistics    Dimensions    Attributes    Lost Shares    Orders    Issues    Wash Composition    Transactional Certificates

---

Name	Value	Field Code	Value
Item No.	10000	Fashion Code	PRINTED
Description	T-shirt gsm	Washer Type Code	ANYTSHIRT
Type	Inventory	Item Construction No.	
Size of Warehouse	PXS	Main Composition Code	COLORCLOTH
Item Flavor Code	PRESALES	Item Wash & Care Instruction No.	WC005
Season Code	2020SS	Item Base No.	001
Delivery Drop Code		Size Range Code	XOS-SM
Item Category Code	SWEETS	2nd Size Range Code	
Collection Group	GPOURS	Available Colors	Color by Name
Brand Code	HITSCODE	Available Samples	None
Gender Code	WOMEN	Manual	Manual
Theatre Code	SPORTY MINIMALISM	Last Date Modified	6/20/2025
Fit Code	SLIM		

**Inventory**

The screenshot shows the 'Item Color Selector' dialog in Dynamics 365 Business Central. The dialog has a title bar with 'Item Color Selector' and standard window controls. Below the title bar is a search bar with a magnifying glass icon and a 'Select All' button. The main area is a table with columns: 'Name', 'Color Code', 'Description', and 'Sample'. The table lists various colors, and the 'SALMON' color is selected, indicated by a blue highlight and a checked checkbox. The background shows the 'Item Card' for '10000 - T-shirt print' with various tabs like 'General', 'Pricing & Discounts', 'Report', 'Inventory', 'Sales', 'Purchase', 'Manufacturing', 'Warehouse', 'Marketing', 'Sales History', 'Sales Forecast', 'Sales Order', 'Sales Invoice', 'Sales Return', 'Sales Credit', 'Sales Debit', 'Sales Transfer', 'Sales Adjustment', 'Sales Cancel', 'Sales Void', 'Sales Reversal', 'Sales Void', 'Sales Transfer', 'Sales Adjustment', 'Sales Cancel', 'Sales Void', 'Sales Reversal'.

Name	Color Code	Description	Sample
<input type="checkbox"/>	OFF-WHITE	White	
<input type="checkbox"/>	WHITE	White	
<input type="checkbox"/>	BLACK	Black	
<input type="checkbox"/>	BROWN	Brown	
<input type="checkbox"/>	GREY	Grey	
<input type="checkbox"/>	YELLOW	Yellow	
<input type="checkbox"/>	BLUE	Blue	
<input checked="" type="checkbox"/>	RED	Red	
<input type="checkbox"/>	GREEN	Green	
<input type="checkbox"/>	ORANGE	Orange	
<input type="checkbox"/>	PURPLE	Purple	
<input type="checkbox"/>	PINK	Pink	
<input type="checkbox"/>	NAVY	Navy	
<input checked="" type="checkbox"/>	SALMON	Salmon	
<input type="checkbox"/>	ACID	Acid	
<input type="checkbox"/>	AQUA	Aqua	
<input type="checkbox"/>	MIDNIGHT	Midnight	
<input type="checkbox"/>	PETROL	Petrol	

10000 - T-shirt print

Home > **Prints & Discounts** > Reports > **More options**

[Create Barcode](#)
[Print Labels](#)
[Print Inventory Labels](#)
[Print Labels by Location](#)
[Print Labels by Category](#)
[Print Labels by Color](#)
[Print Labels by Size](#)
[Print Labels by Material](#)
[Print Labels by Style](#)
[Print Labels by Color](#)
[Print Labels by Size](#)
[Print Labels by Material](#)
[Print Labels by Style](#)

[Inventory](#)
[Print Labels](#)
[Print Labels by Location](#)
[Print Labels by Category](#)
[Print Labels by Color](#)
[Print Labels by Size](#)
[Print Labels by Material](#)
[Print Labels by Style](#)

**Item**
**10000**
**Printed**

**Item Name**
**10000**
**Printed**

**Item Code**
**10000**
**Printed**

**Item Description**
**10000**
**Printed**

**Item Category**
**10000**
**Printed**

**Item Sub-Category**
**10000**
**Printed**

**Item Material**
**10000**
**Printed**

**Item Color**
**10000**
**Printed**

**Item Size**
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**Printed**

**Item Style**
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**Printed**

**Item Location**
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**Printed**

**Item Status**
**10000**
**Printed**

**Item Date**
**10000**
**Printed**

**Item Price**
**10000**
**Printed**

**Item Weight**
**10000**
**Printed**

**Item Length**
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**Item Width**
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**Printed**

**Item Height**
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**Printed**

**Item Volume**
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**Printed**

**Item Area**
**10000**
**Printed**

**Item Perimeter**
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**Printed**

**Item Surface Area**
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**Printed**

**Item Volume**
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**Item Weight**
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**Item Length**
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**Item Height**
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**Item Volume**
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**Printed**

**Item Weight**
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**Printed**

**Item Length**
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**Printed**

**Item Width**
**10000**
**Printed**

**Item Height**
**10000**
**Printed**

**Item Volume**
**10000**
**Printed**

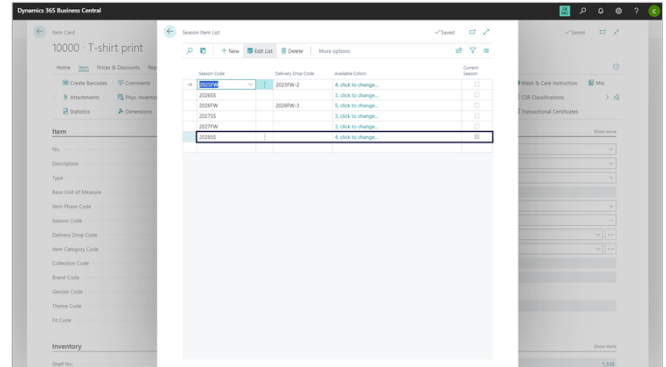
**Item Weight**
**10000**
**Printed**

**Item Length**
**10000**
**Printed**

**Item Width**
**10000**
**Printed**

**Item**

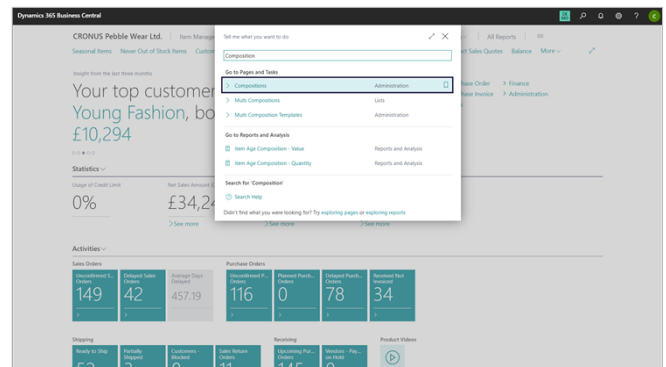
For each season, the colors used are shown. The current season is indicated with a check mark. This is the season currently set on the item card.



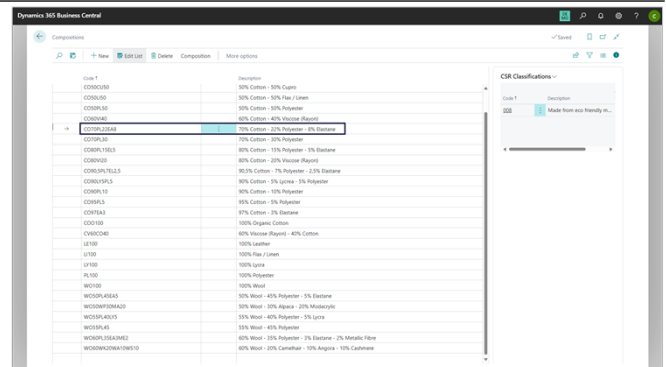
## 2.2.4. Item Compositions BC25

### 2.2.4.1. Item Composition

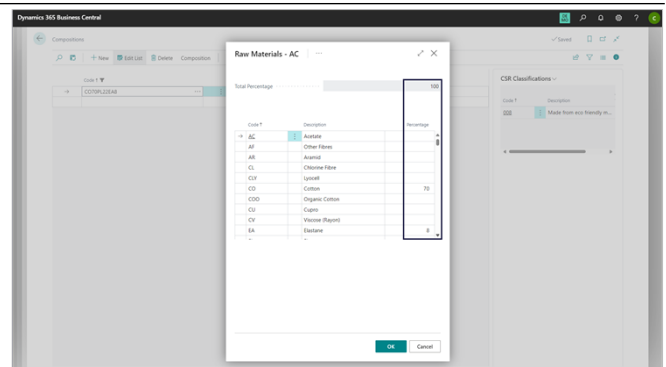
Navigate to Compositions



For each composition, a code can be created that includes various fabric compositions.



The composition code and description are generated once the percentages of the combined materials add up to 100 percent.

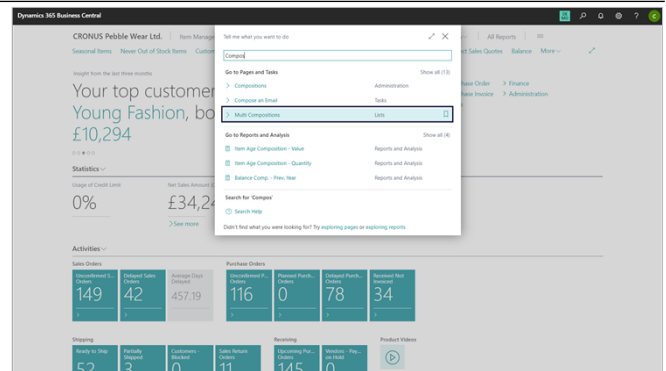


### 2.2.4.2. Multi Compositions

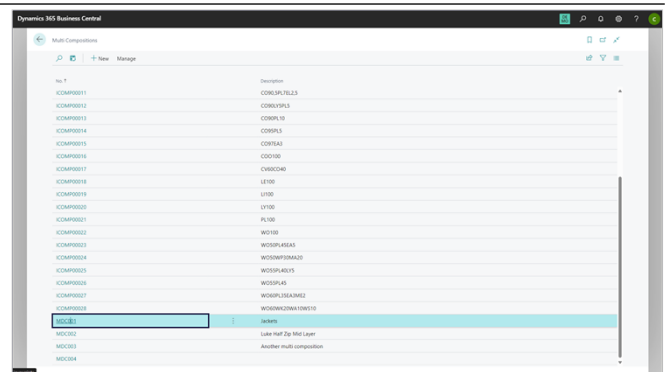
Multiple compositions can be applied to a single item, accommodating complex clothing styles with various fabrics and materials. For example, a jacket may

include separate compositions for the outer shell, inner liner, and additional components, allowing for greater flexibility and precision in product detailing.

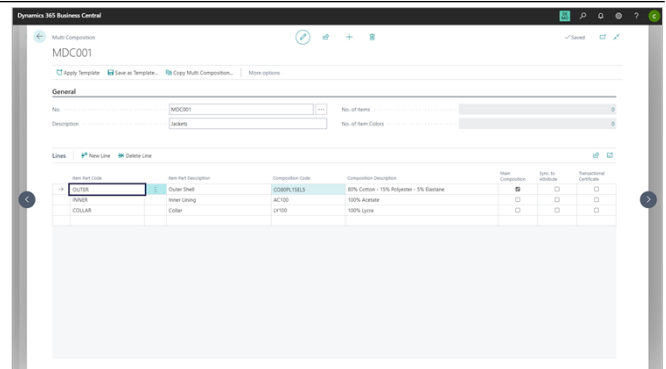
Navigate to Multi Compositions



For each Multi Composition, a code can be created that includes various item parts and their corresponding compositions.

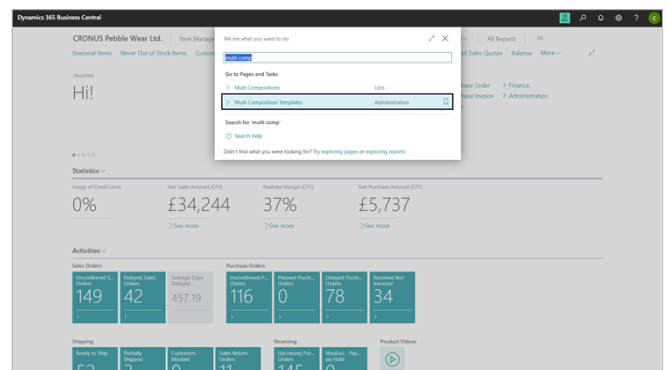


Item Part codes and descriptions can be freely defined and created. For each item part, a composition can be assigned. The complete set of item parts forms the multi composition. A checkmark in the Main Composition field indicates that the specific item part contains the main composition.



## 2.2.4.3. Multi Compositions Templates

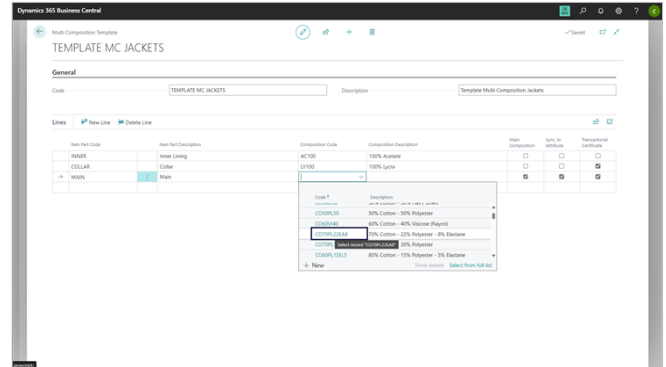
Navigate to Multi Composition Templates





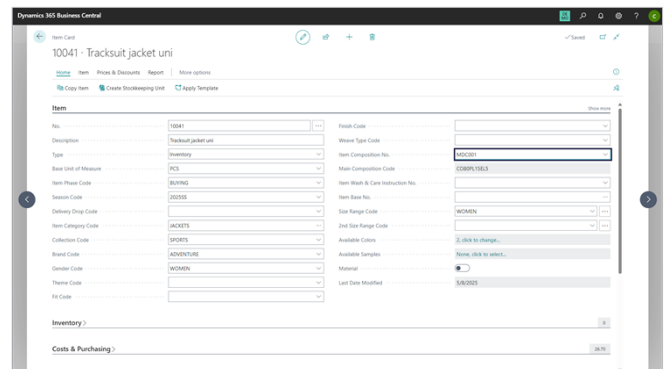
It is possible to manually create a template with various item parts and their compositions.

A template can also be generated from an existing multi composition by using the Save as Template function. Finally, when creating a new multi composition, an existing template can be used.



### 2.2.4.3.1. Item composition on item card

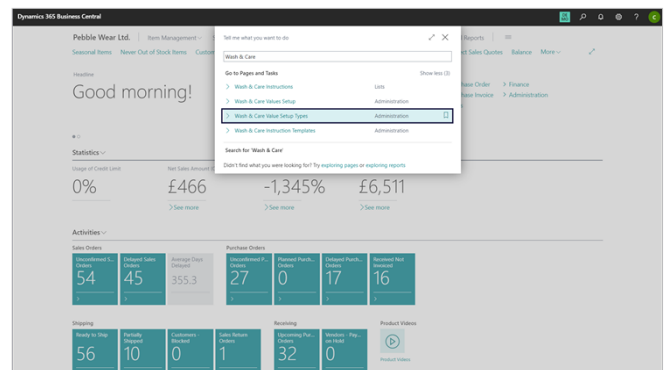
On the item card, the correct Multi Composition can be selected, after which the associated Main Composition code can also be displayed.



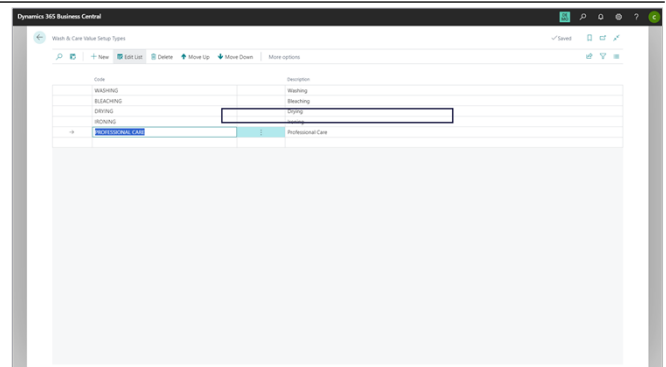
## 2.2.5. Item Wash and Care BC25

### 2.2.5.1. Wash and Care Values Setup Types

Navigate to Wash & Care Setup Types

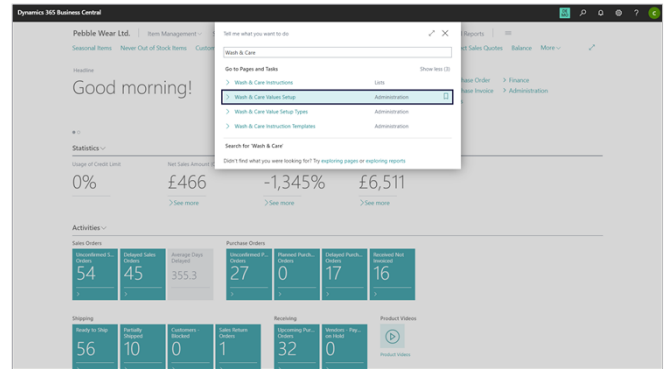


By creating custom group codes, instructions can be organized into groups.

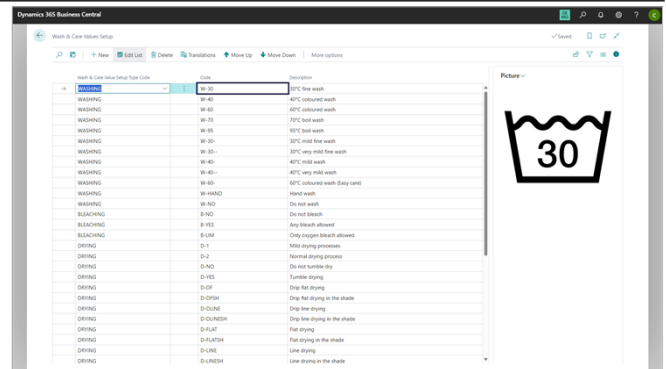


## 2.2.5.2. Wash and Care Values Setup

Navigate to Wash & Care Values Setup

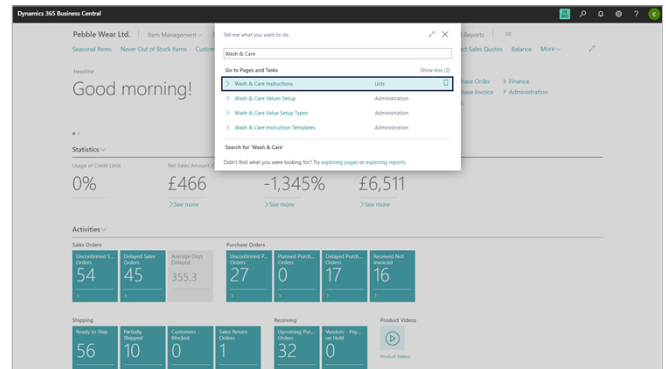


For each Wash & Care Value Setup Type Code, multiple codes can be created with a corresponding description and picture.

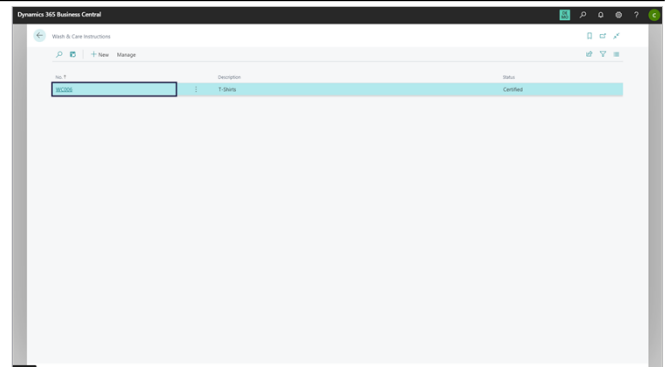


## 2.2.5.3. Wash and Care Instructions

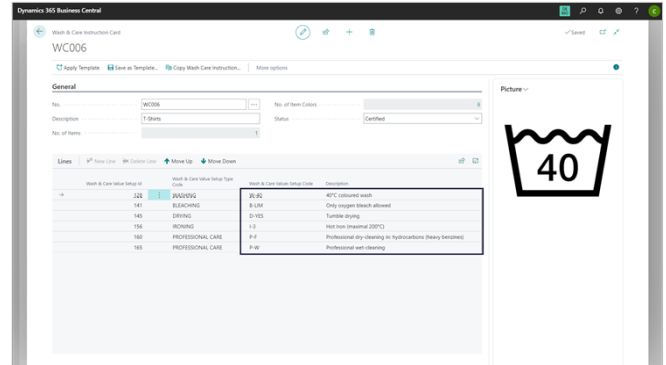
Navigate to Wash & Care Instructions



Multiple instruction sets can be created, each with its own wash and care characteristics.

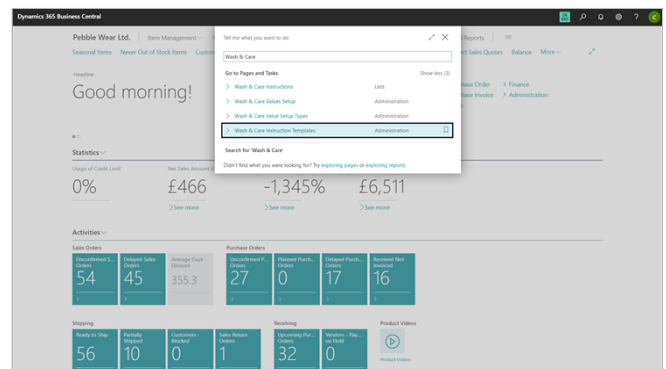


When creating a specific wash and care instruction card, the previously defined individual wash and care instruction value codes can be used. The instruction card can only be used once it has been certified.

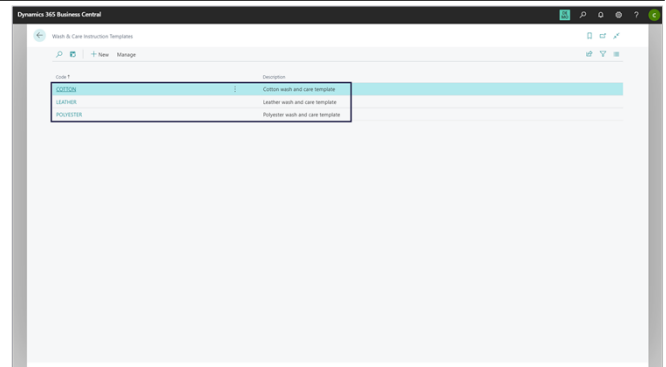


## 2.2.5.4. Wash and Care Instruction Templates

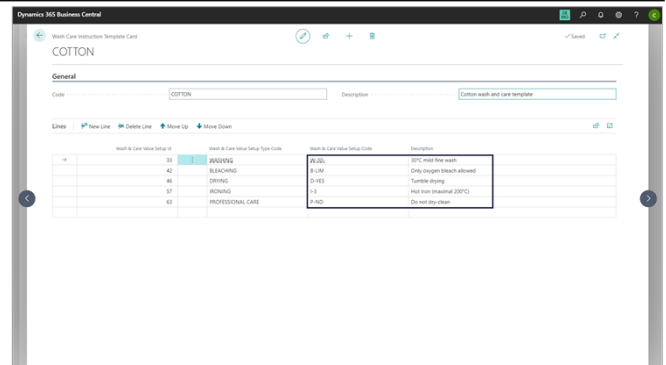
Navigate to Wash & Care Instruction Templates



It is possible to manually create templates with various wash and care instructions. A template can also be generated from an existing wash and care instruction by using the Save as Template function. Finally, when creating a new wash and care instruction, an existing template can be used.

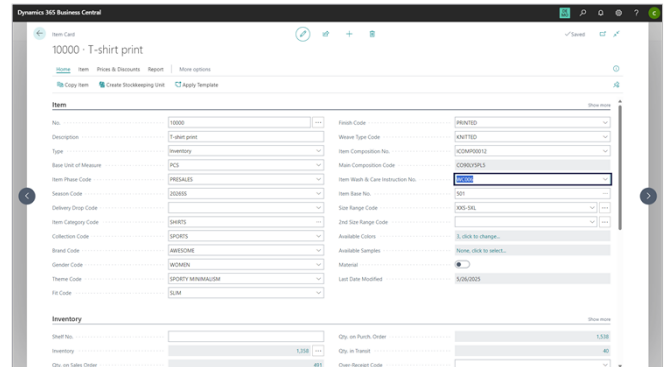


When creating a specific wash and care instruction card, the previously defined individual wash and care instruction value codes can be used.



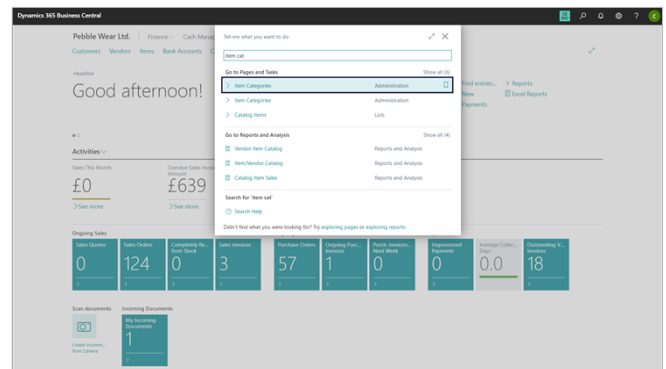
### 2.2.5.5. Wash and Care Instruction on item card

On the item card, the correct Wash & Care Instruction set can be selected.

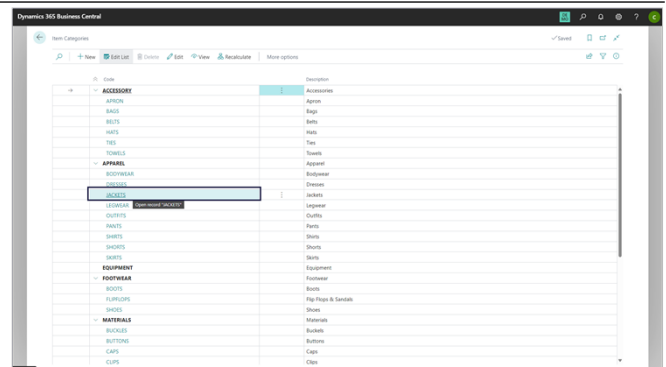


### 2.2.6. Item Categories BC25

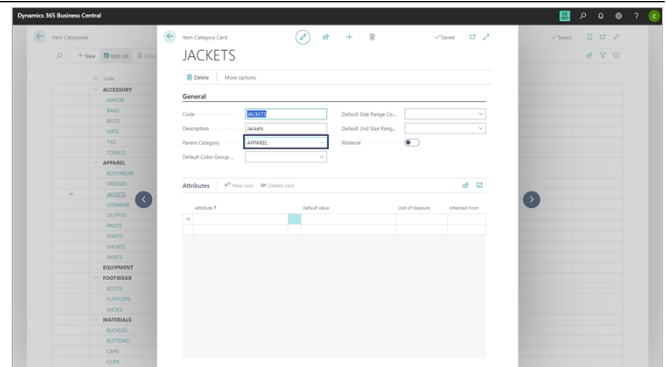
Navigate to Item Categories



It is possible to create multiple item categories as needed, with a distinction between regular and parent categories.

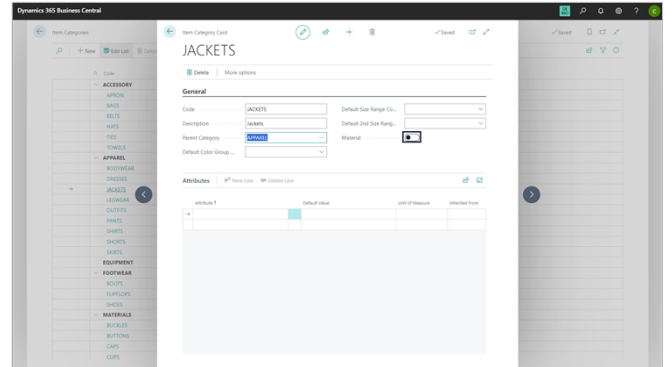


By filling in the Parent Category field, a category can be linked to another category.



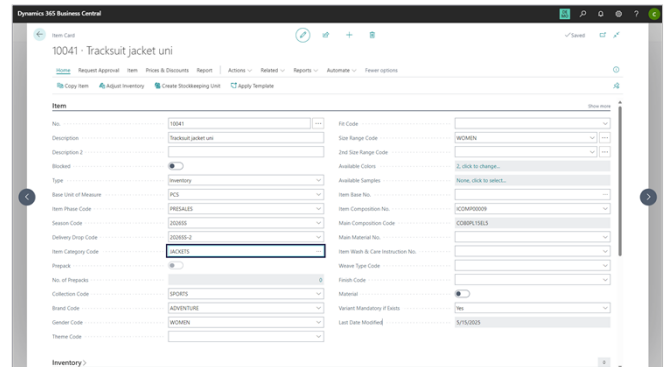
## K3 Pebblestone

It can be specified whether an item is a material or a finished product.



The screenshot shows the 'Item Category Card' for 'JACKETS'. The 'General' tab is active, displaying fields for Code (JACKETS), Description (Jackets), Parent Category (Jackets), and Default Color Group. The 'Attributes' section shows a table with columns for Attribute ID, Default Value, Unit of Measure, and Inherited From. The left sidebar shows a list of item categories including ACCESSORY, APPAREL, EQUIPMENT, and MATERIALS.

An item category can be assigned to an item on the item card.

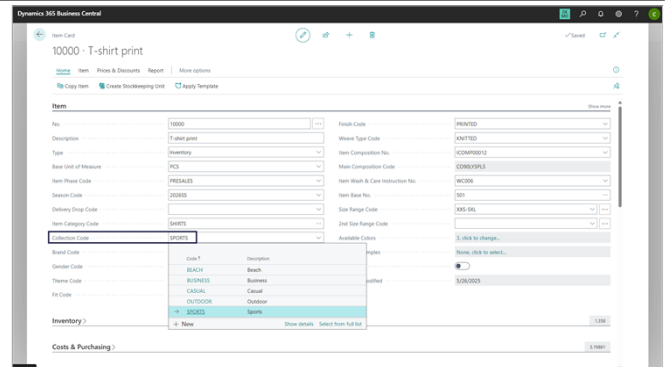


The screenshot shows the 'Item Card' for '10041 Tracksuit jacket uni'. The 'Item' tab is active, displaying various fields for the item, including No. (10041), Description (Tracksuit jacket uni), Type (Inventory), Base Unit of Measure (PCS), Item Phase Code (PRESALES), Season Code (2020SS), Delivery Drop Code (2020SS-0), Item Category Code (JACKETS), and various codes for Fit, Size Range, and Material. The 'Inventory' section shows the current stock level.

## 2.2.7. Collection Brand Gender Theme BC

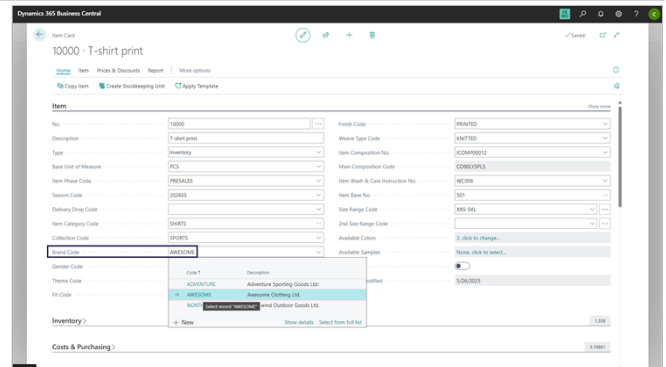
On the item card, there are numerous fashion-related fields available that can be filled as desired. Based on the content of these fields, statistical information can be gathered through segmentations using a BI tool.

It is possible to create as many collections as desired. The correct label can be assigned to each item.



The screenshot shows the 'Item Card' for '10000 T-shirt print'. The 'Item' tab is active, displaying various fields for the item, including No. (10000), Description (T-shirt print), Type (Inventory), Base Unit of Measure (PCS), Item Phase Code (PRESALES), Season Code (2020SS), Delivery Drop Code (2020SS-0), Item Category Code (JACKETS), and various codes for Fit, Size Range, and Material. The 'Inventory' section shows the current stock level.

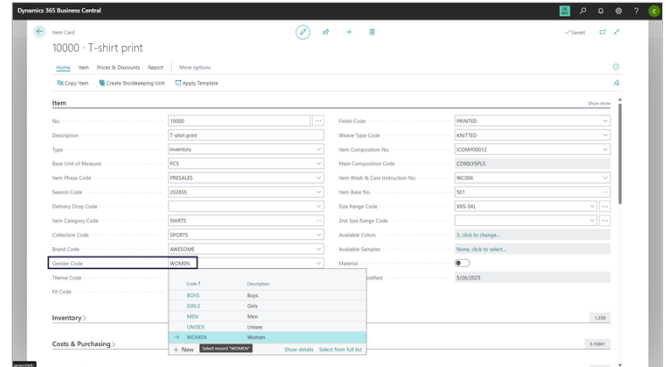
It is possible to create as many brands as desired. The correct label can be assigned to each item.



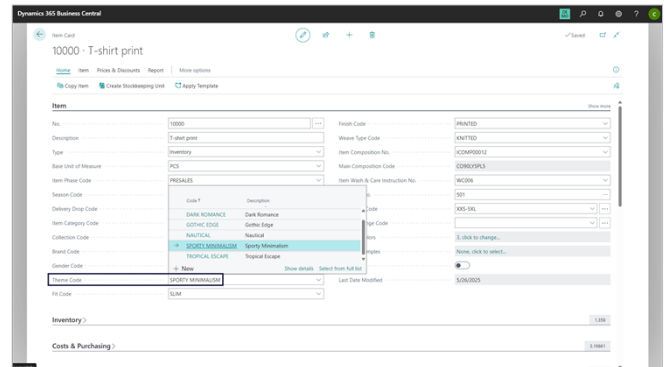
The screenshot shows the 'Item Card' for '10000 T-shirt print'. The 'Item' tab is active, displaying various fields for the item, including No. (10000), Description (T-shirt print), Type (Inventory), Base Unit of Measure (PCS), Item Phase Code (PRESALES), Season Code (2020SS), Delivery Drop Code (2020SS-0), Item Category Code (JACKETS), and various codes for Fit, Size Range, and Material. The 'Inventory' section shows the current stock level.

K3 Pebblestone

It is possible to create as many genders as desired.  
The correct label can be assigned to each item.



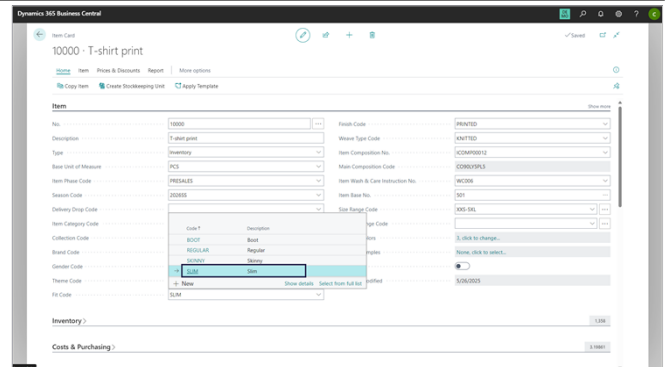
It is possible to create as many themes as desired.  
The correct label can be assigned to each item.



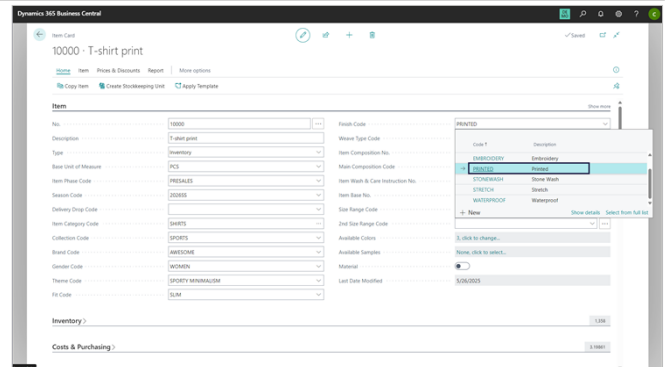
## 2.2.8. Fit Finish Weave Type BC25

On the item card, there are numerous fashion-related fields available that can be filled as desired. Based on the content of these fields, statistical information can be gathered through segmentations using a BI tool.

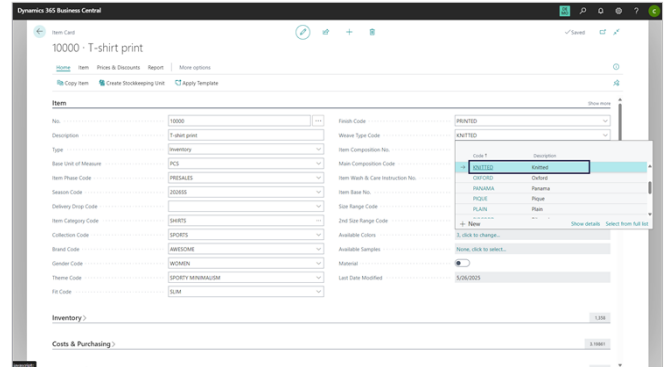
It is possible to create as many fits as desired. The correct label can be assigned to each item.



It is possible to create as many finishes as desired.  
The correct label can be assigned to each item.



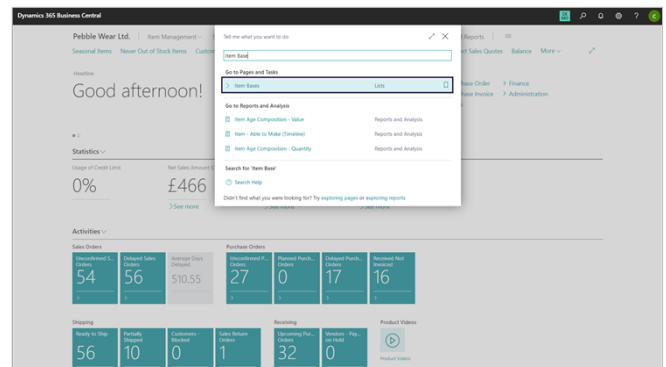
It is possible to create as many weave types as desired. The correct label can be assigned to each item.



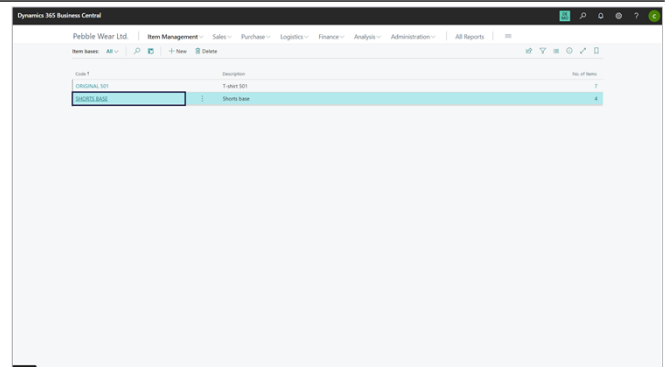
## 2.2.9. Item Bases BC25

### 2.2.9.1. Item Bases

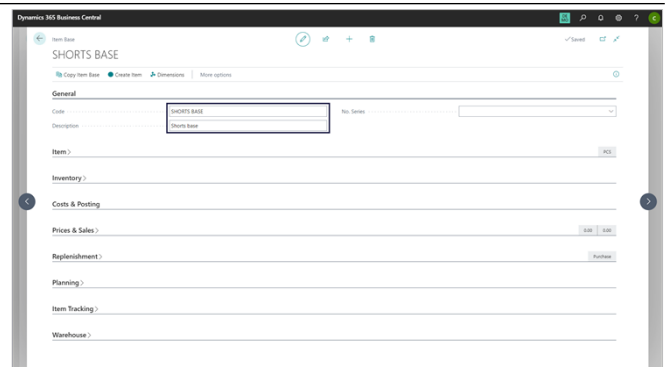
Navigate to Item Bases



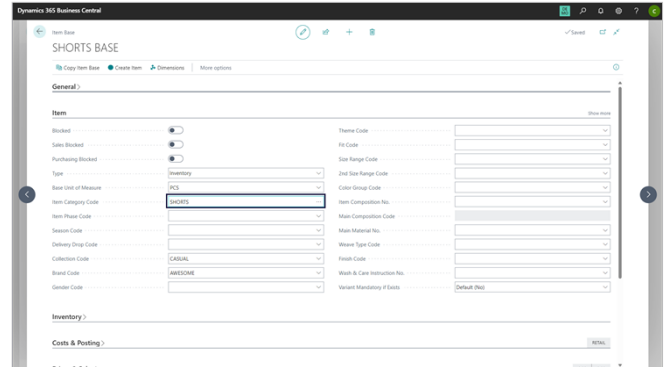
It is possible to create an item base code to set a number of recurring default characteristics.



Click on the button **Costs & Posting**

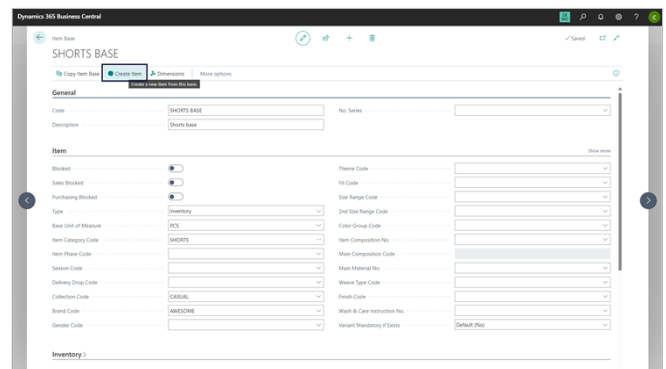


Predefined values can be set as desired for the created item base.

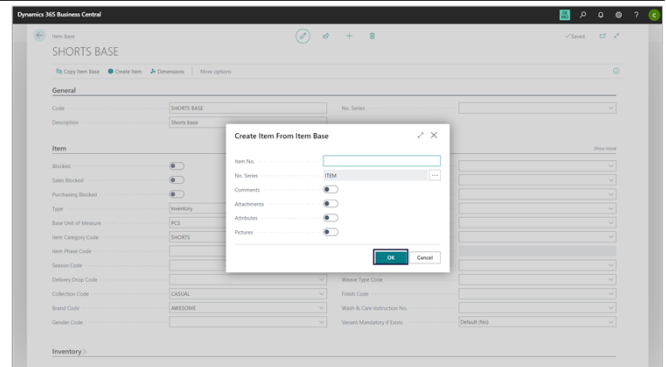


## 2.2.9.2. Create items from Item Base

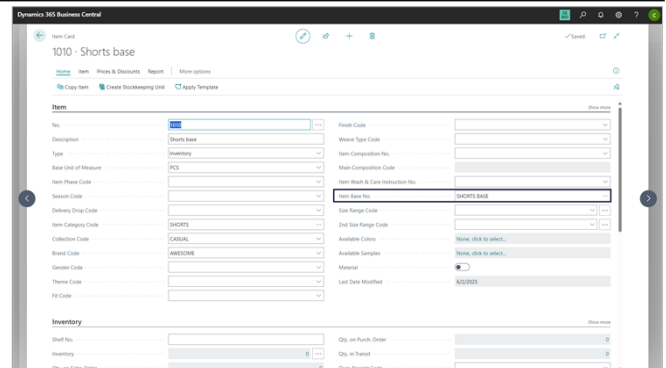
Click on the navigation menu item **Create Item**



Click on the button **OK**



Click on **No. Description Type Inventory Service Non-Inventory Base Unit of Measure Item Phase Code Season Code Delivery Drop Code Item Category Code Collection Code Brand Code Gender Code Theme Code Fit Code Finish Code Weave Type Code Item Composition No. Main Com**



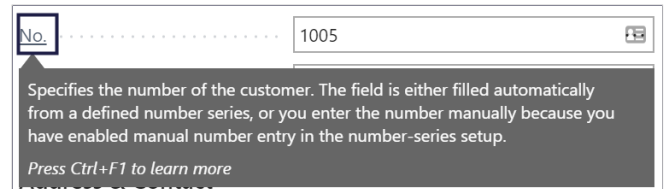


## 2.3. Item creation, prepacks, barcodes

### 2.3.1. Item creation

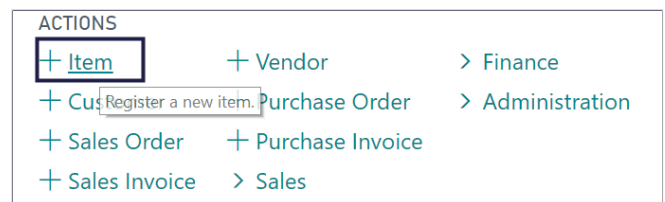
#### 2.3.1.1. Tooltip

1. All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.

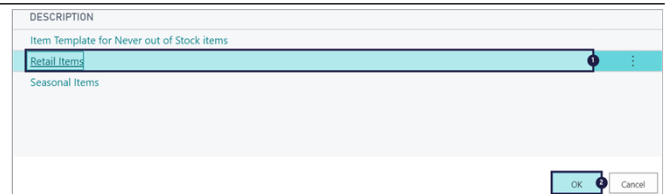


#### 2.3.1.2. Create a new Item

1. Click on the navigation menu item **Item**.



1. **Description.** Choose which template you want to use for creating a new Item.
2. Click on the button **OK**.



#### 2.3.1.3. General

1. **No.** Specifies the number of the item. The field is either filled automatically from a defined number series, or you enter the number manually.
2. **Description.** Fill in a Description for the item.
3. **Base Unit of Measure.** Specifies the base unit used to measure the item, such as piece, box, or pallet. The base unit of measure also serves as the conversion basis for alternate units of measure.
4. **Item Phase Code.** Specifies the code which reflects the status of the item, item statuses can be used to block for certain activities. E.g. Shipping or sales order entry
5. **Season Code.** Choose the Season, if the Season does not exist create one.
6. **Previous Seasons.** Specifies the number of previous seasons that this item belongs to.
7. **Delivery Drop Code.** Choose the Delivery drop, if the Delivery drop does not exist create one.

Item	
No. ....	10084 ... 1
Description .....	Socks multicoloured 2
Base Unit of Measure .....	PCS 3
Item Phase Code .....	CLOSING SALES 4
Season Code .....	2020SS 5
Previous Seasons .....	6
Delivery Drop Code .....	2 7
Item Category Code .....	LEGWEAR 8
Collection Code .....	CASUAL 9
Brand Code .....	AWESOME 10
Gender Code .....	MEN 11
Theme Code .....	12

8. **Item Category Code.**  
Choose the Item Category, if the Item Category does not exist create one.
9. **Collection Code.**  
Choose the Collection, if the Collection does not exist create one.
10. **Brand Code.**  
Choose the Brand, if the Brand does not exist create one.
11. **Gender Code.**  
Choose the Gender, if the Gender does not exist create one.
12. **Theme Code.**  
Choose the Theme, If the Theme does not exist create one.

1. **Fit Code.**  
Choose the Fit. If the Fit does not exist create one.
2. **Size Range Code.**  
Choose the Size Range, if the Size Range does not exist create one.
3. **2nd Size Range Code.**  
Choose the 2nd Size Range, if the 2nd Size Range does not exist create one.
4. **Color Group Code.**  
Choose the Color Group, if the Color Group does not exist create the Color Group.
5. **Available Colors.**  
Choose the Color, if the Color does not exist create the color(s).
6. **Composition Code.**  
Choose the Composition if the Composition does not exist create one.
7. **Style No.**  
Specifies the number of the style that the item belongs to.
8. **Main Material No.**  
Specifies the number for the main material.
9. **Weave Type Code.**  
Specifies the weave type of the item. The weave type is copied from the Main Material by default, but can also set specifcally for the main item.
10. **Finish Code.**  
Specifies how the item is finished. The finish is copied from the Main Material by default, but can also be set specifically for the main item.

Show less

Fit Code .....		1
Size Range Code .....	SOCKS	2
2nd Size Range Code .....		3
Color Group Code .....		4
Available Colors .....	3. click to change...	5
Composition Code .....	COB0PL15EL5	6
Style No. ....		7
Main Material No. ....		8
Weave Type Code .....		9
Finish Code .....		10

#### 2.3.1.4. Inventory

1. **Shelf No.**  
Specifies where to find the item in the warehouse. This is informational only.

<b>Inventory</b>	
Shelf No. ....	<div style="border: 1px solid black; height: 20px;"></div>

## 2.3.1.5. Cost & Purchasing

### 2.3.1.5.1. Cost Details

1. **Standard Cost.**  
Specifies the unit cost that is used as an estimation to be adjusted with variances later. It is typically used in assembly and production where costs can vary.
2. **Unit Cost.**  
Specifies the cost of one unit of the item or resource on the line.
3. **Special Purch. Prices & Discounts.**  
Specifies special purchase prices and line discounts for the item, if there are no purchase prices or line discounts create purchase prices and discounts.

COST DETAILS	
Standard Cost .....	0.00 <span>1</span>
Unit Cost .....	0.00 <span>2</span>
Special Purch. Prices & Disco...	<a href="#">Create New...</a> <span>3</span>

### 2.3.1.5.2. Foreign Trade

1. **Tariff No.**  
Add a code for the item's tariff number.

FOREIGN TRADE	
Tariff No. ....	<input type="text"/> <span>1</span>

### 2.3.1.6. Price & Sales

1. **Unit Price.**  
Specifies the price of one unit of the item or resource. You can enter a price manually or have it entered according to the Price/Profit Calculation field on the related card.
2. **Recommended Retail Price.**  
Specifies the recommended retail price for one unit of the item.
3. **Profit %.**  
Specifies the profit margin that you want to sell the item at. You can enter a profit percentage manually or have it entered according to the Price/Profit Calculation field.

Prices & Sales	
Unit Price .....	0.00 <span>1</span>
Recommended Retail Price ....	0.00 <span>2</span>
Profit % .....	0.00 <span>3</span>

1. **Special Sales Prices & Discounts.**  
Specifies special prices and line discounts for the item, if there are no prices and line discounts create prices and line discounts
2. **Special Recommended Retail Prices.**  
Specifies special recommended retail prices for the item, if there are no recommended retail prices create recommended retail prices.

Special Sales Prices & Discou...	<a href="#">Create New...</a> <span>1</span>
Special Recommended Retail ...	<a href="#">Create New...</a> <span>2</span>

### 2.3.1.7. Replenishment

1. **Lead Time Calculation.**  
Specifies a date formula for the amount of time it takes to replenish the item.
2. **Order Threshold.**  
Specifies the order threshold for this item. The Order threshold can also be set on color level. If the quantities on the presales orders are below the order threshold, then the item is most likely discontinued.

Replenishment	
Lead Time Calculation .....	6M <span>1</span>
Order Threshold .....	<span>2</span>

### 2.3.1.7.1. Purchase

1. Move the mouse to the field **Vendor No.**  
Specifies the vendor code of who supplies this item by default.
2. Click on the lookup button **Vendor No.**
3. Move the mouse to the cell **No.** on any row.

PURCHASE				
Vendor No. ....	<span>1</span> <span>2</span>			
Vendor Item No. ....				
	NO.	NAME	CITY	POST CODE
	100	London Fashion Makers	London	N12 5XY
	101	Malay-Dan Export Unit Sdn Bhd		MY-57000
	102	esyen '13 Sdn Bhd		MY-42000
	103	Tengah Butong Sdn Bhd		MY-88100
	104	Service for Fashion Ltd.		ZA-3900
	+ New <span>Select from full list</span>			
Last Phys. Invt. Date .....				
Last Counting Period Update .....				
Next Counting Start Date .....				

1. Move the mouse to the field **Vendor Item No.**  
Specifies the number that the vendor uses for this item, add it if needed.

Vendor Item No. ....	
----------------------	--

### 2.3.1.8. Warehouse

1. **Warehouse Class Code.**  
Specifies the warehouse class code for the item.
2. **Put-away Template Code.**  
Specifies the code of the put-away template by which the program determines the most appropriate zone and bin for storage of the item after receipt.
3. **Put-away Unit of Measure Code.**  
Specifies the code of the item unit of measure in which the program will put the item away.
4. **Phys Invt Counting Period Code.**  
Specifies the code of the counting period that indicates how often you want to count the item in a physical inventory.
5. **Last Phys. Invt. Date.**  
Specifies the date on which you last posted the results of a physical inventory for the item to the item ledger.
6. **Last Counting Period Update.**  
Specifies the last date on which you calculated the counting period. It is

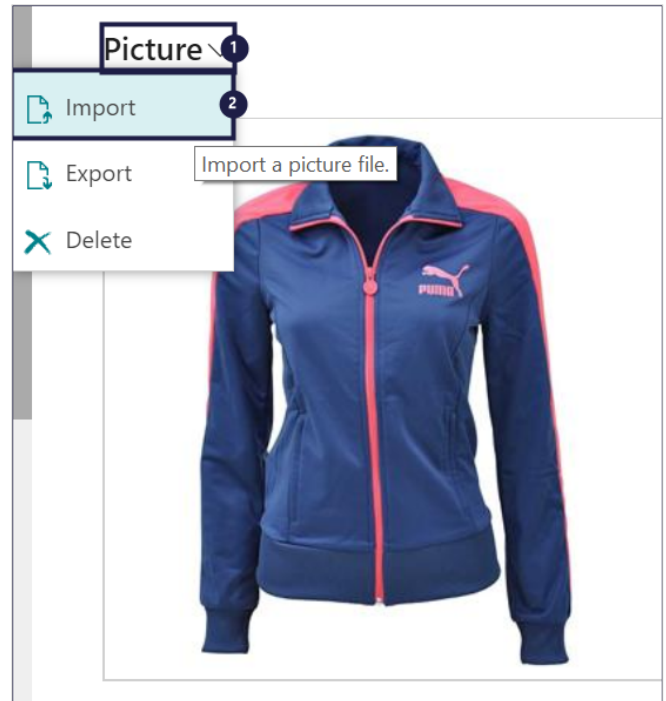
Warehouse		Show more	
Warehouse Class Code .....	<span>1</span>	Last Phys. Invt. Date .....	<span>6</span>
Put-away Template Code .....	<span>2</span>	Last Counting Period Update .....	<span>6</span>
Put-away Unit of Measure Code .....	<span>3</span>	Next Counting Start Date .....	<span>6</span>
Phys Invt Counting Period Code .....	<span>4</span>	Next Counting End Date .....	<span>6</span>

updated when you use the function  
Calculate Counting Period.

7. **Next Counting Start Date.**  
Specifies the starting date of the next counting period.
8. **Next Counting End Date.**  
Specifies the ending date of the next counting period.

### 2.3.1.9. Picture

1. Click on the link **Actions for Picture.**
2. **Import.**  
Choose import and add a picture.

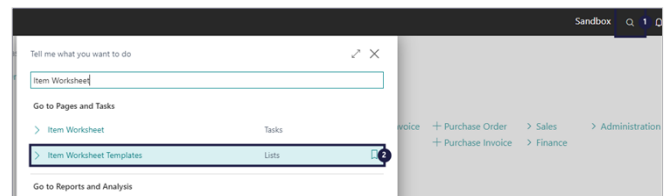


### 2.3.2. Import items

#### 2.3.2.1. Item Worksheet Templates setup

Navigate to Item worksheet templates

1. Click on the link **Search** - Enter the text **Item Worksheet.**
2. Click on **Item Worksheet Templates Lists.**

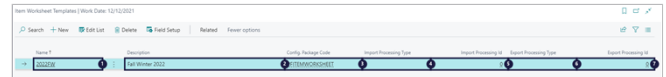


1. **New**  
**Create a new entry.**
2. **Edit List**  
**Make changes on the page.**
3. **Delete**  
**Delete the selected row.**
4. **Field Setup**  
**when choosing the assist edit you can change which fields are visible or not in the item worksheet.**
5. **Related.**
6. **Fewer options**  
**Hide secondary actions.**

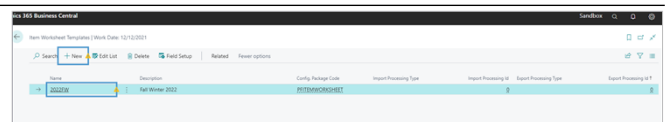


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1. **Name.**  
Specifies the name of the item worksheet template you are creating.
2. **Description.**  
Specifies a brief description of the item worksheet template you are creating.
3. **Config. Package Code.**  
Specifies the Configuration Package that will be used to import / export items, item colors and item sizes combined as a RapidStart package or by Excel.
4. **Import Processing Type.**  
Specifies the type of object that will be used to import data into the worksheet.
5. **Import Processing Id.**  
Specifies the object id that will be used to import data into the worksheet.
6. **Export Processing Type.**  
Specifies the type of object that will be used to export the data in the worksheet.
7. **Export Processing Id.**  
Specifies the object id that will be used to export the data in the worksheet.



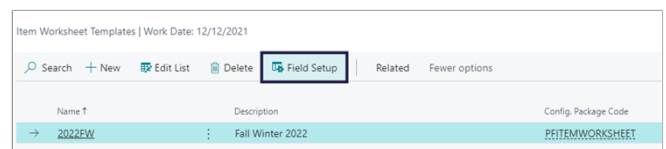
- **New:** Create a new entry.
- **Name:** When you have create a new item worksheet template, just give it a name. After you give it a name the configuration package code PFITEMWORKSHEET is automatically added.



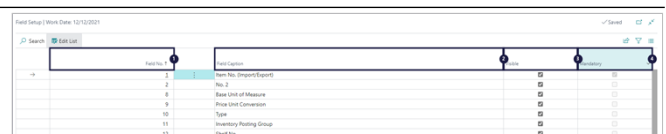
### 2.3.2.2. Field Setup Item worksheet

Navigate to Field Setup

1. **Field Setup**  
when choosing the assist edit you can change which fields are visible or not in the item worksheet.



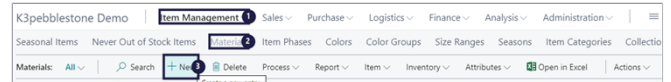
1. **Field No.**  
Specifies the field number.
2. **Field Caption.**  
Specifies the field caption.
3. **Visible.**  
Determines whether the field is visible or not.
4. **Mandatory.**  
Determines whether the field is mandatory visible. If mandatory is set, then visible is set too and you cannot change this.



## 2.3.3. Material creation

### 2.3.3.1. Create a new material

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Materials**.
3. Move the mouse to the navigation menu item **New**.



### 2.3.3.2. General

1. **No.**  
Specifies the number of the item. The field is either filled automatically from a defined number series, or you enter the number manually.
2. **Description.**  
Fill in a Description for the item.
3. **Base Unit of Measure.**  
Specifies the base unit used to measure the item, such as piece, box, or pallet. The base unit of measure also serves as the conversion basis for alternate units of measure.
4. **Item Phase Code.**  
Specifies the code which reflects the status of the item, item statuses can be used to block for certain activities. E.g. Shipping or sales order entry
5. **Season Code.**  
Choose the Season, if the Season does not exist create one.
6. **Delivery Drop Code.**  
Choose the Delivery drop, if the Delivery drop does not exist create one.
7. **Item Category Code.**  
Choose the Item Category, if the Item Category does not exist create one.
8. **Collection Code.**  
Choose the Collection, if the Collection does not exist create one.
9. **Brand Code.**  
Choose the Brand, if the Brand does not exist create one.
10. **Gender Code.**  
Choose the Gender, if the Gender does not exist create one.
11. **Theme Code.**  
Choose the Theme, If the Theme does not exist create one.

Item	
No. ....	T0006
Description .....	Fabric Pique
Base Unit of Measure .....	M
Item Phase Code .....	BUYING
Season Code .....	NOOS
Delivery Drop Code .....	
Item Category Code .....	
Collection Code .....	CASUAL
Brand Code .....	
Gender Code .....	
Theme Code .....	

1. **Size Range Code.**  
Choose the Size Range, if the Size Range does not exist create one.
2. **2nd Size Range Code.**  
Choose the 2nd Size Range, if the 2nd Size Range does not exist create one.
3. **Color Group Code.**  
Choose the Color Group, if the Color Group does not exist create the Color Group.
4. **Available Colors.**  
Choose the Color, if the Color does not exist create the color(s).
5. **Composition Code.**  
Choose the Composition if the Composition does not exist create one.
6. **Weave Type Code.**  
Specifies the weave type of the item.  
The weave type is copied from the Main Material by default, but can also set specifcally for the main item.
7. **Finish Code.**  
Specifies how the item is finished.  
The finish is copied from the Main Material by default, but can also be set specifically for the main item.
8. **Width.**  
Specifies the width of the fabric for the material.
9. **Shrinkage Length %.**  
Specifies the shrinkage percentage of the length of the fabric.
10. **Shrinkage Width %.**  
Specifies the shrinkage percentage of the width of the fabric.

Size Range Code .....	<input type="text"/>	1
2nd Size Range Code .....	<input type="text"/>	2
Color Group Code .....	BASE	3
Available Colors .....	13, click to change...	4
Composition Code .....	CO70PL30	5
Weave Type Code .....	PIQUE	6
Finish Code .....	<input type="text"/>	7
Width .....	<input type="text"/>	8
Shrinkage Length % .....	<input type="text"/>	9
Shrinkage Width % .....	<input type="text"/>	10
Last Date Modified .....	2/10/2020	

### 2.3.3.3. Inventory

- **Shelf No.**  
Specifies where to find the item in the warehouse.  
This is informational only.

Inventory		Show more
Shelf No. ....	<input type="text"/>	

### 2.3.3.4. Costs & Purchasing

1. **Standard Cost.**  
Specifies the unit cost that is used as an estimation to be adjusted with variances later. It is typically used in assembly and production where costs can vary.
2. **Unit Cost.**  
Specifies the cost of one unit of the item or resource on the line.
3. **Special Purch. Prices & Discounts.**  
Specifies special purchase prices and

Costs & Purchasing		Show more
COST DETAILS		FOREIGN TRADE
Standard Cost .....	<input type="text"/>	Tariff No. .... <input type="text"/>
Unit Cost .....	4.00	<input type="button" value="Look up value"/>
Special Purch. Prices & Discounts .....	<input type="button" value="Create New"/>	



4. line discounts for the item.  
**Tariff No.**  
Specifies a code for the item's tariff number.

### 2.3.3.5. Prices & Sales

1. **Unit Price.**  
Specifies the price of one unit of the item or resource. You can enter a price manually or have it entered according to the Price/Profit Calculation field on the related card.
2. **Recommended Retail Price.**  
Specifies the recommended retail price for one unit of the item.
3. **Profit %.**  
Specifies the profit margin that you want to sell the item at. You can enter a profit percentage manually or have it entered according to the Price/Profit Calculation field.
4. **Special Sales Prices & Discounts.**  
Specifies special prices and line discounts for the item.
5. **Special Recommended Retail Prices.**  
Specifies special recommended retail prices for the item.

### 2.3.4. Item Sizes - Ratio Curves BC25

Navigate to Size Ranges. Select the correct size range and click on Ratio Curves.

Create or select the correct Ratio Curve code and click on Ratio Curve Sizes.

Enter the quantities per size for the selected ratio curve.

Size	Quantity
34	1
36	2
38	2
40	4
42	4
44	2
46	1
48	1
<b>Total</b>	<b>14</b>

Each size range can have multiple ratio curves, each with different sets of quantities per size.

Size	Quantity
34	2
36	4
38	4
40	4
42	4
44	2
46	1
48	1
<b>Total</b>	<b>18</b>

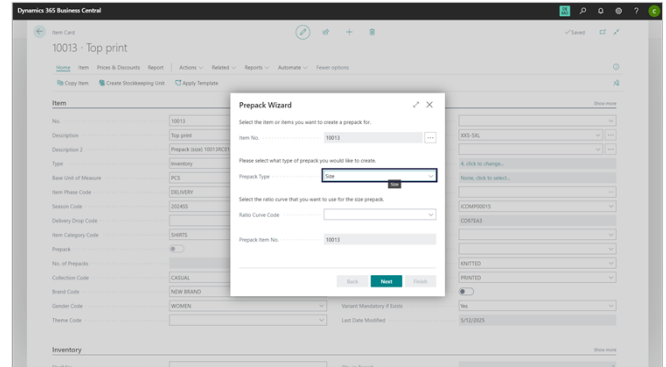
Once a size range is assigned to an item, the associated ratio curves are included as well.

## 2.3.5. Item Prepack Sizes BC25

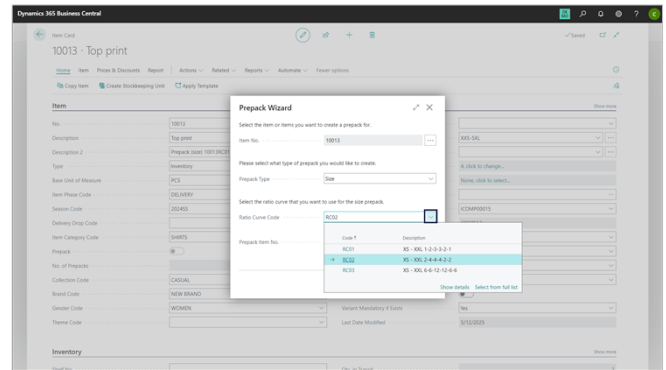
From an item with solid sizes, it is possible to create a prepack with a size range for this item by using the Create Prepack wizard function.

## K3 Pebblestone

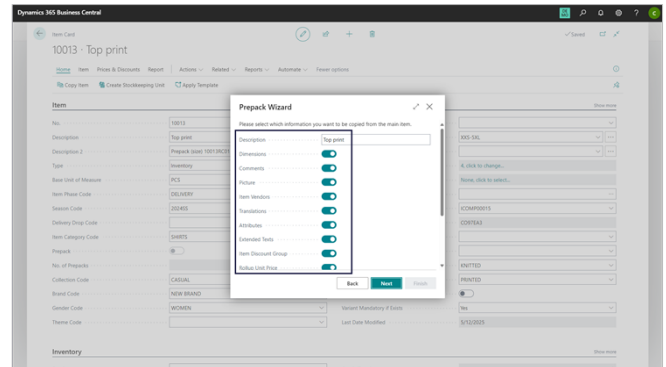
When creating a number of items across a size range, Size must be selected as the Prepack Type.



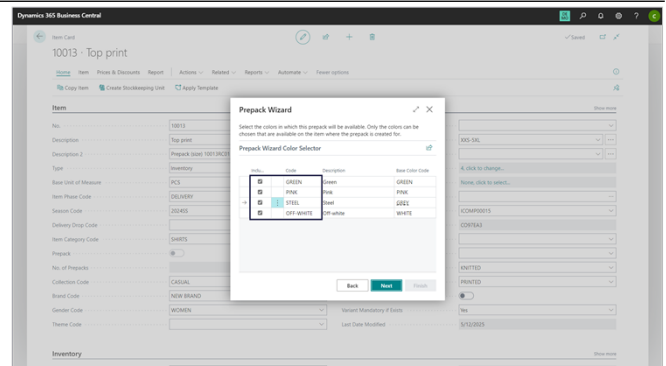
By selecting a ratio curve, the quantity distribution across the size range is determined. For the new prepack item to be created, a new item number will be generated, which also includes the ratio curve code.



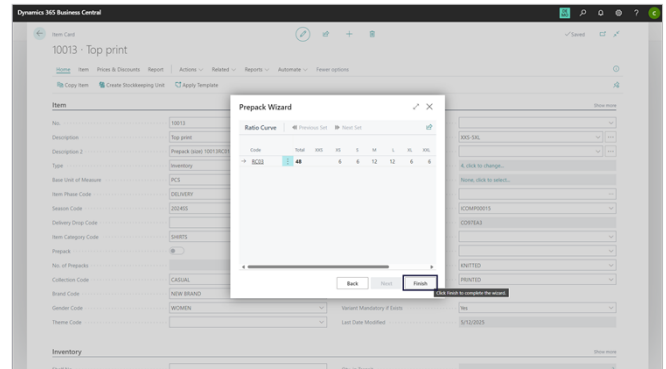
Characteristics of the main item can be copied to the new prepack item by enabling the desired options.



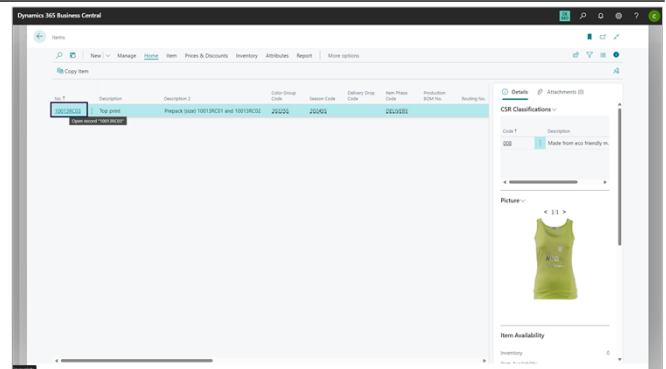
It is possible to specify in which colors the new prepack item should be available.



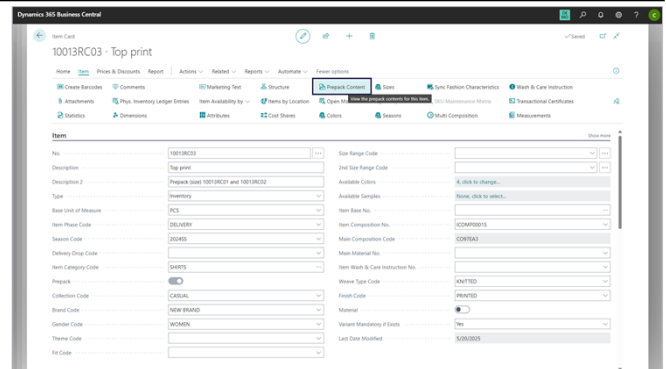
The prepack content is displayed.



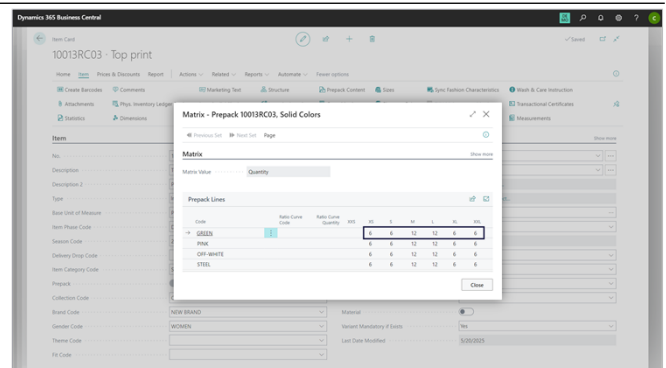
The newly created prepack item is displayed.



The prepack content can always be displayed for the newly created prepack item.

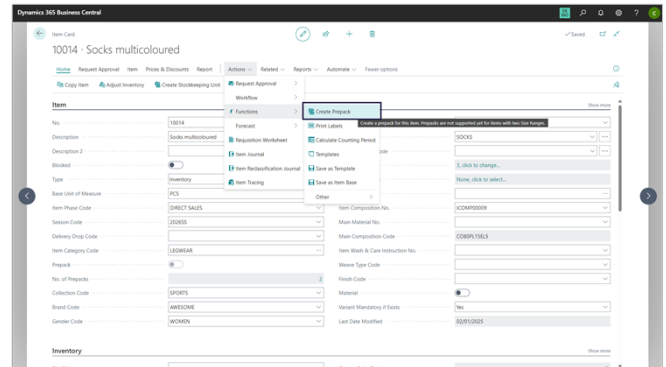


For the selected colors, the quantities per size within the chosen size range are shown.

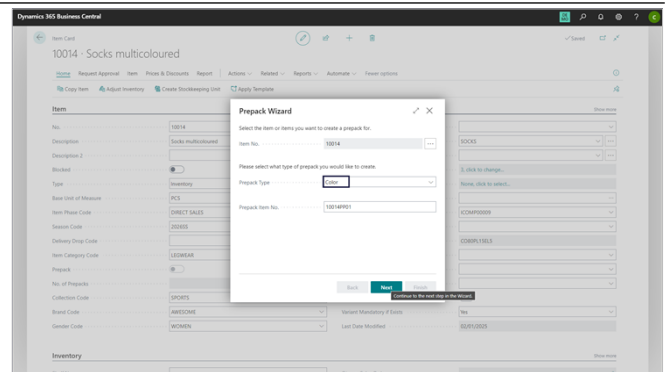


## 2.3.6. Item Prepack Colors BC25

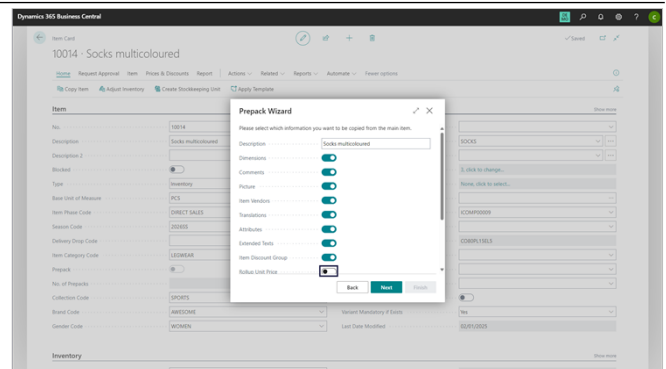
From an item with solid sizes, it is possible to create a prepack over different colors for this item by using the Create Prepack wizard function.



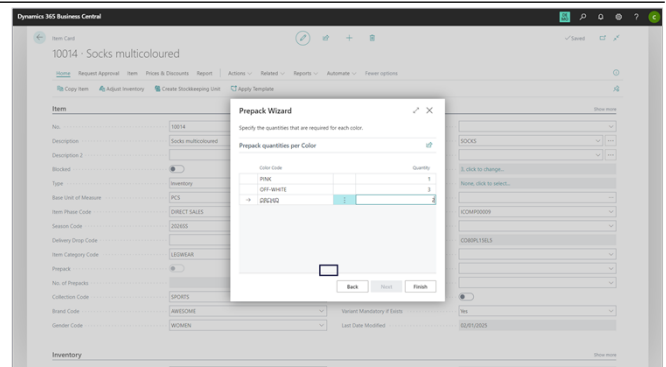
When creating a number of items across different colors, Color must be selected as the Prepack Type. For the new prepack item to be created, a new item number will be generated, extended with a PP code.



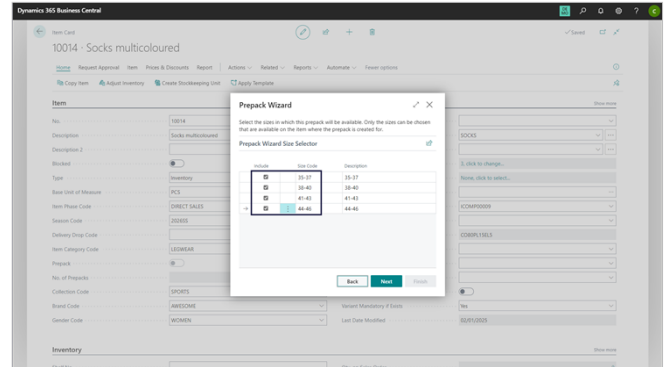
Characteristics of the main item can be copied to the new prepack item by enabling the desired options.



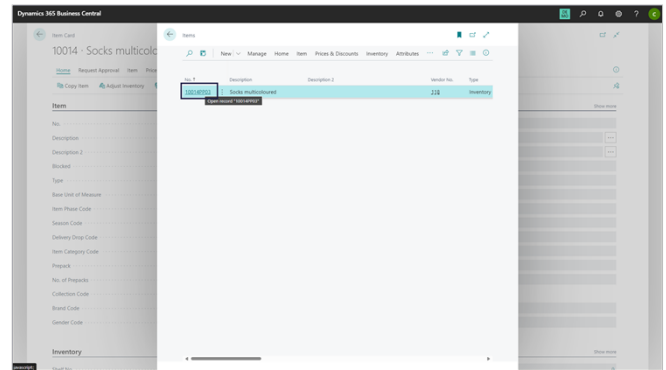
It is possible to specify the quantities per color included in a prepack for a specific size.



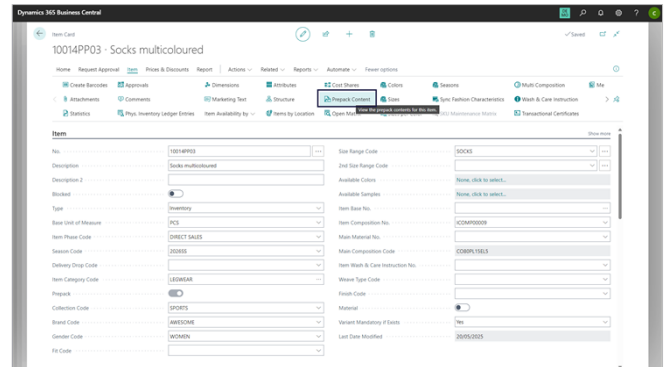
It is possible to specify in which sizes the new prepack item should be available.



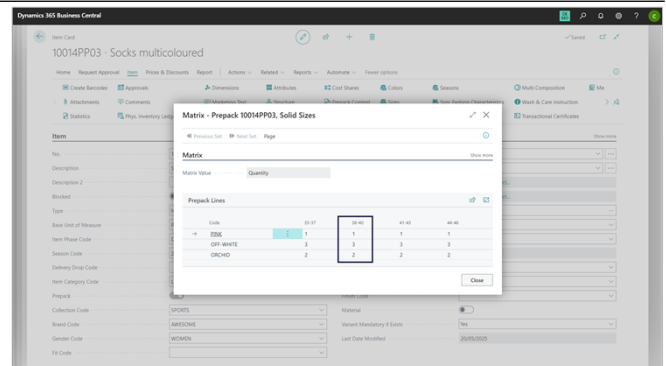
The newly created prepack item is displayed.



The prepack content can always be displayed for the newly created prepack item.



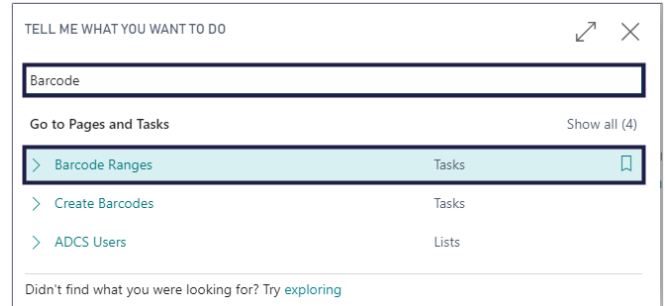
For the selected sizes, the quantities per color are shown.



## 2.3.7. Barcode Ranges

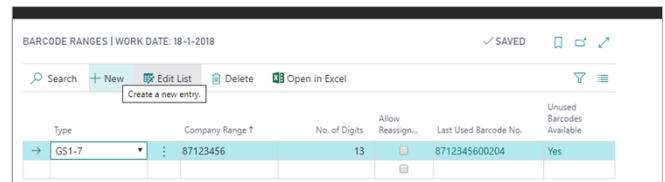
### 2.3.7.1. Navigate to Barcode Ranges

- Click on the link **Tell me what you want to do.** Quickly access actions, pages, reports, documentation, and apps and consulting services.
- Type to start search:.
- Choose **Barcode Ranges Tasks** ☐.

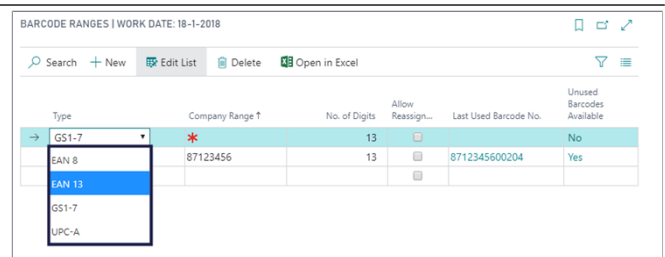


### 2.3.7.2. Create a new Barcode Range

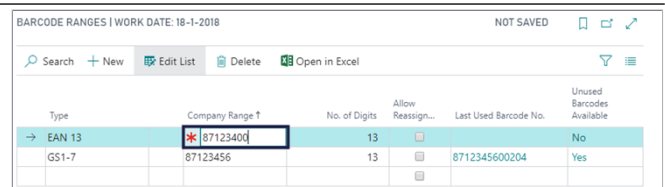
Click on the navigation menu item **New**.



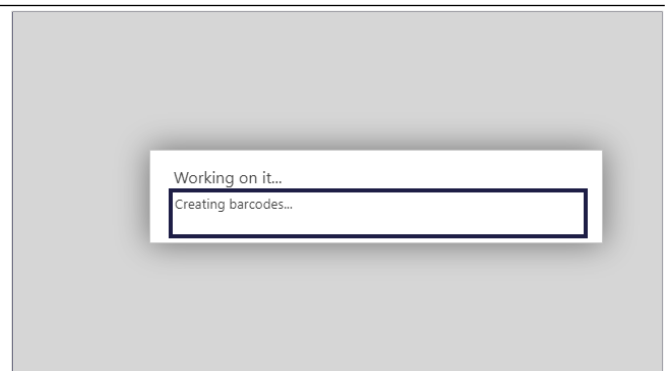
Click on an option from the list.



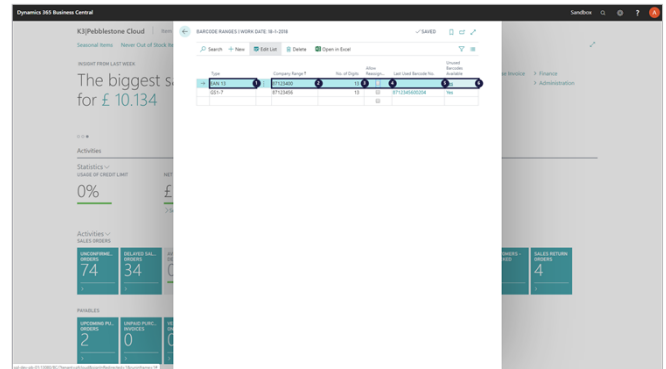
Fill in the **Company Range**.



The **Creating barcodes...** is running



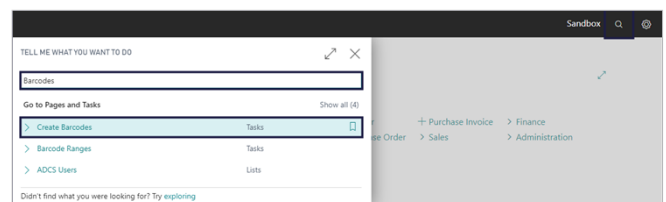
1. **Type.**  
Specifies the barcode format for which the range is setup.
2. **Company Range.**  
Specifies the portion of the barcode that corresponds with the range that has been purchased by the company. All barcodes that will be created from the range will be a sequencing number commencing with the range number and most likely a checkdigit. The Range No. should only hold the recurring part of the barcode's that are created from the range.
3. **No. of Digits.**  
Specifies the total number of digits a created barcode has, including the checkdigit. The length of the barcode is dependend of the barcode type.
4. **Allow Reassignment.**  
Indicates that it's allowed to reuse gaps in the existing range for barcode assignment. Gaps can be created when items are removed from the collection or when items with barcodes are manually removed. Usually reassignments are allowed to save some costs, but only after a couple of years to avoid that one barcode can exist for several items.
5. **Last Used Barcode No.**  
Specifies which barcode numbers is last assigned from the barcode range.
6. **Unused Barcodes Available.**  
Specifies if the barcode range has any barcodes available.



## 2.3.8. Create Barcodes

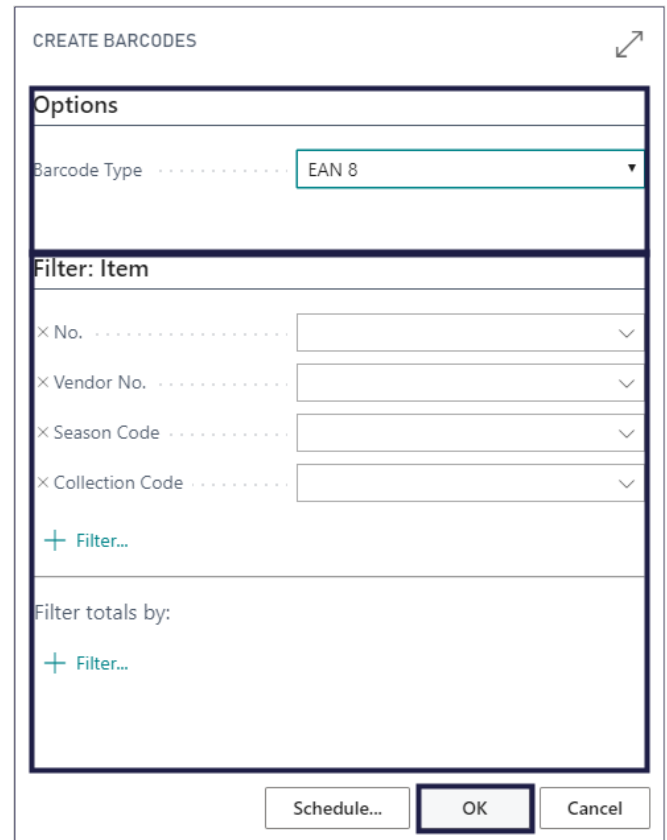
### 2.3.8.1. Navigate to Create Barcodes

- Click on the link **Tell me what you want to do.** Quickly access actions, pages, reports, documentation, and apps and consulting services.
- **Type to start search:.**
- Choose **Create Barcodes Tasks** ☐.



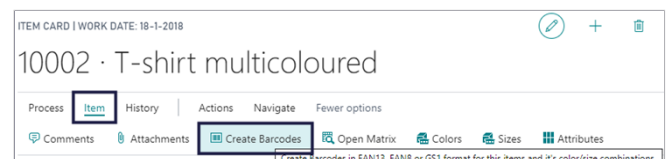


- Choose which barcode type you want to create.
- Choose the right filters.
- Click on the button **OK**.  
The barcodes are being created.

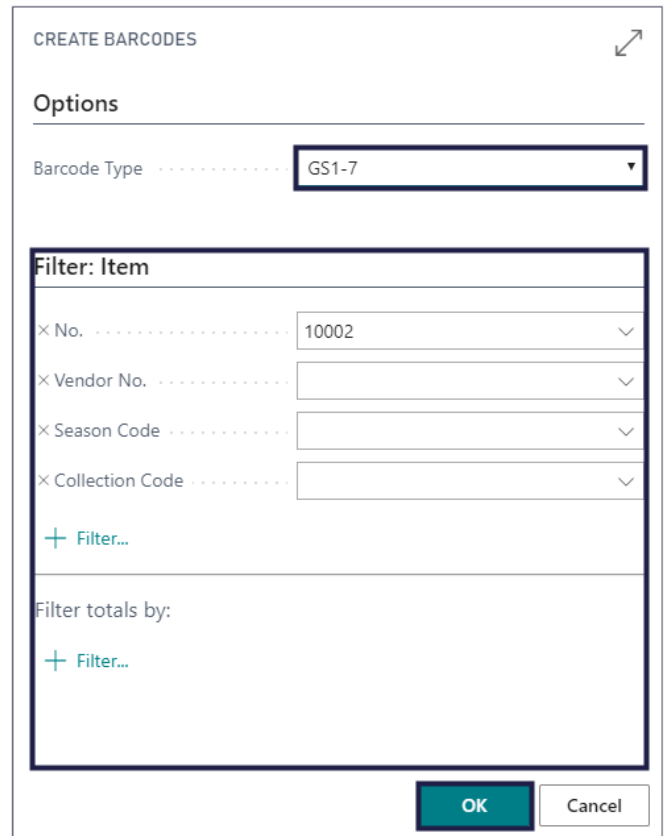


### 2.3.8.2. Create Barcodes on an item

- Click on the navigation menu item popup **Item**.
- Click on the navigation menu item **Create Barcodes**.



- Choose which barcode type you want to create.
- Choose the right filters.
- Click on the button **OK**.  
The barcodes are being created.



CREATE BARCODES

Options

Barcode Type ..... GS1-7

Filter: Item

× No. .... 10002

× Vendor No. ....

× Season Code ....

× Collection Code ....

+ Filter...

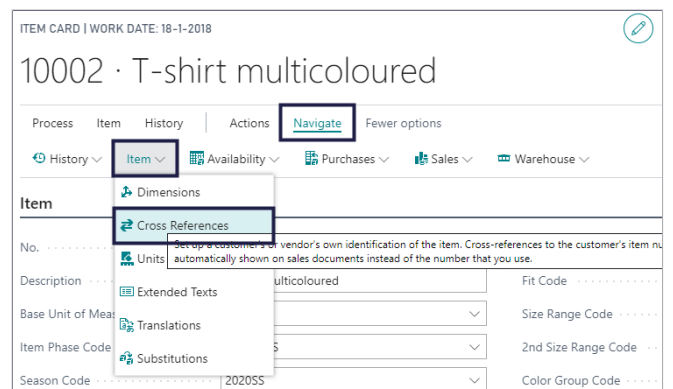
Filter totals by:

+ Filter...

OK Cancel

### 2.3.8.3. Navigate to Cross Reference

- Click on the navigation menu item popup **Navigate**.
- Click on the navigation menu item popup **Item**.
- Click on the navigation menu item **Cross References**.



ITEM CARD | WORK DATE: 18-1-2018

10002 · T-shirt multicoloured

Process Item History Actions **Navigate** Fewer options

History Item Availability Purchases Sales Warehouse

Item

Dimensions

**Cross References**

Units

Extended Texts

Translations

Substitutions

No. ....

Description .... multicoloured

Base Unit of Measure .... S

Item Phase Code .... S

Season Code .... 2020SS

Fit Code ....

Size Range Code ....

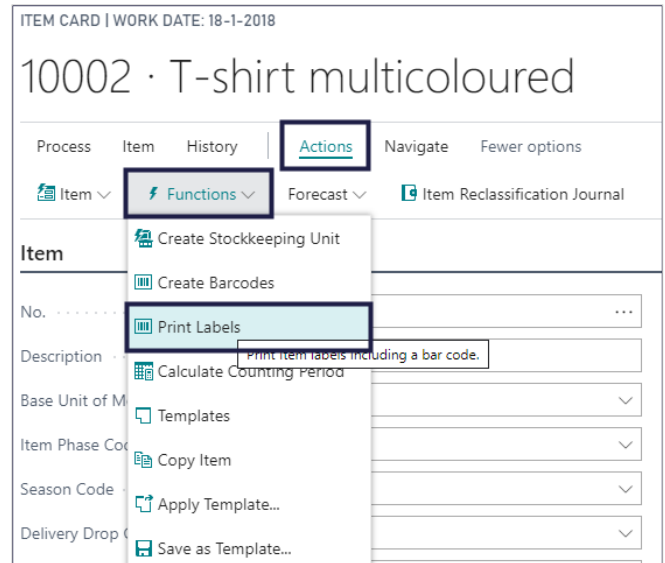
2nd Size Range Code ....

Color Group Code ....

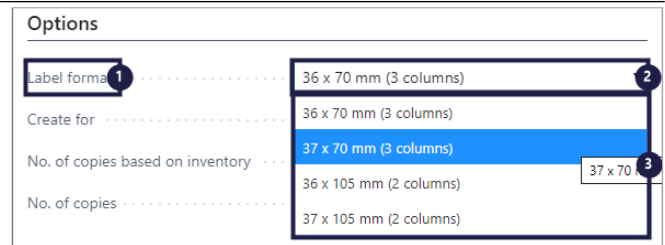
## 2.3.9. Barcode Labels

### 2.3.9.1. Navigate to Barcode labels on Item

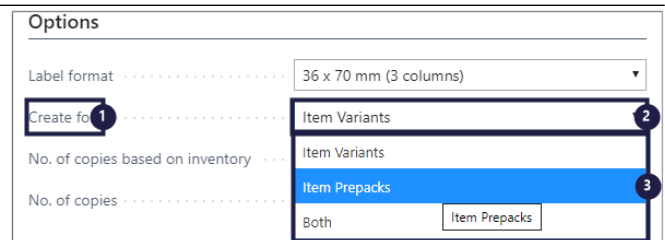
- Click on the navigation menu item popup **Actions**.
- Click on the navigation menu item popup **Functions**.
- Click on the navigation menu item **Print Labels**.



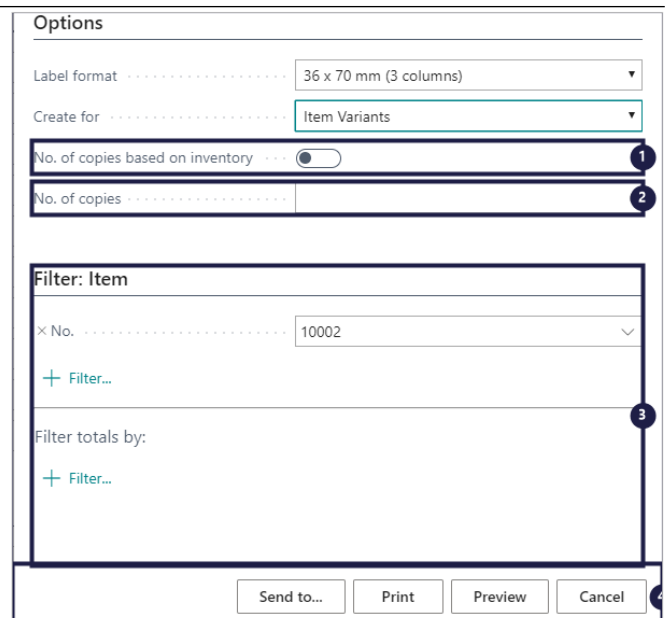
- Label format.**  
Specifies the size of the labels and whether they are printed in two or three columns.
- Click on the field **Label format**.
- Click on an option from the list.



- Create for.**  
Specifies if you want to print a label for each item variant, each item prepack, or both variants and prepacks.
- Click on the field **Create for**.
- Click on an option from the list.



- No. of copies based on inventory.**  
Indicates whether or not you want to print as much labels as there are items, item variants, or prepacks on inventory.
- No. of copies.**  
Specifies the number of labels you want to create if you have not chose to create the number of labels based on inventory.
- Choose the filters.
- Make a choice **Send to... Print Preview Cancel**.

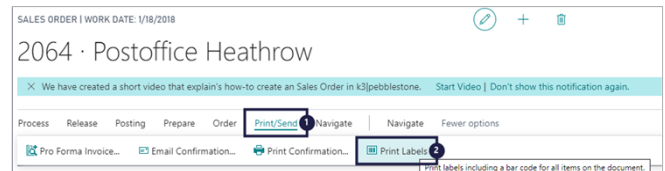


- This is the outcome of the preview.

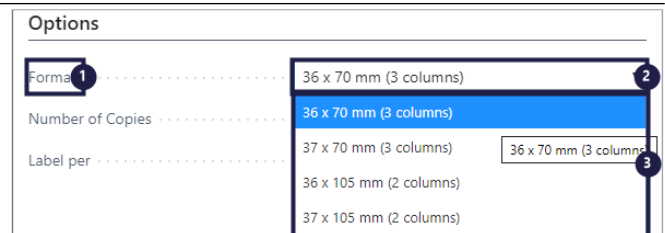


### 2.3.9.2. Print barcode label from Sales order

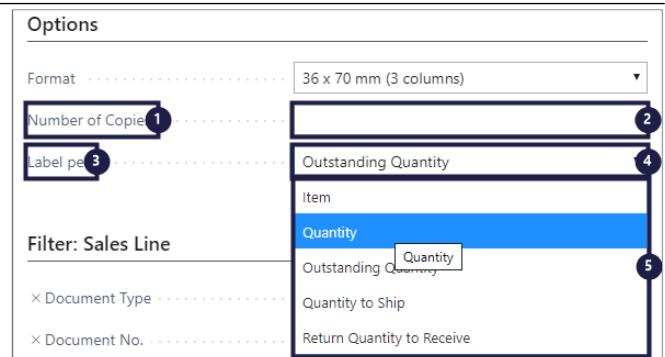
1. Click on the navigation menu item popup **Print/Send**.
2. Click on the navigation menu item **Print Labels**.



1. **Format.**  
Specifies the size of the labels and whether they are printed in two or three columns.
2. Click on the field **Format**.
3. Click on an option from the list.



1. **Number of Copies.**  
Specifies the number of labels you want to create if you have not chosen to create the number of labels based on inventory.
2. Choose the **Number of Copies**.
3. **Label per.**  
Indicates whether or not you want to print as much labels as there are items, quantities, outstanding quantities, etc..
4. Click on the field **Label per**.
5. Click on an option from the list.



1. Choose the filters.
2. Move the mouse to **Send to... Print Preview Cancel**.

- This is the outcome of the preview.

### 2.3.9.3. Print barcode label from Purchase order

1. Click on the navigation menu item popup **Print/Send**.
2. Click on the navigation menu item **Print Labels**.

1. **Format.**  
Specifies the size of the labels and whether they are printed in two or three columns.
2. Click on the field **Format**.
3. Click on an option from the list.

1. **Number of Copies.**  
Specifies the number of labels you want to create if you have not chosed to create the number of labels based on inventory.
2. Choose the **Number of Copies**.

1. **Label per.**  
Indicates whether or not you want to print as much labels as there are items, quantities, outstanding quantities, etc..
2. Click on the field **Label per.**
3. Click on an option from the list.

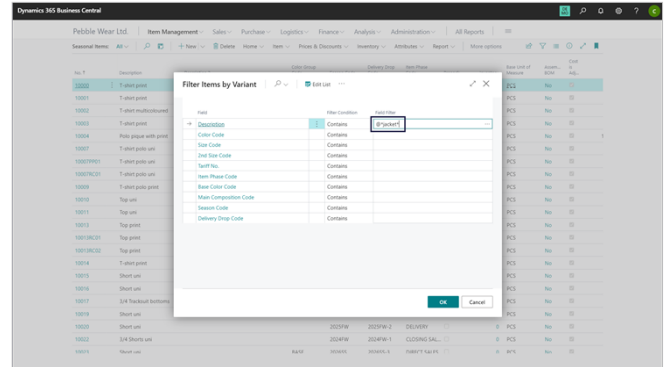
1. Choose the filters.
2. Move the mouse to **Send to... Print Preview Cancel.**

- This is the outcome of the preview.

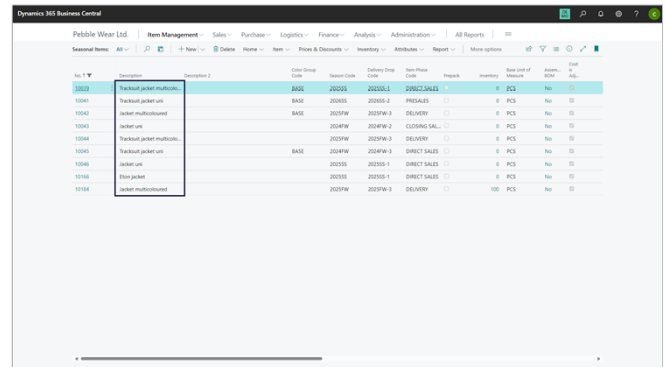
## 2.3.10. Filter items by variant BC25

Navigate to Filter by Variants

Enter a filter in the Field Filter field behind the field you want to filter on.



Based on your filter term, the items that match the filter will be displayed.

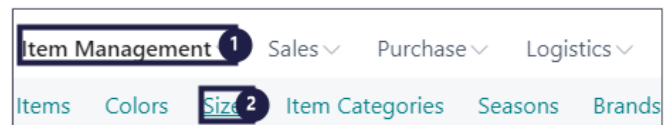


## 2.4. Item samples

### 2.4.1. One sample size for all genders

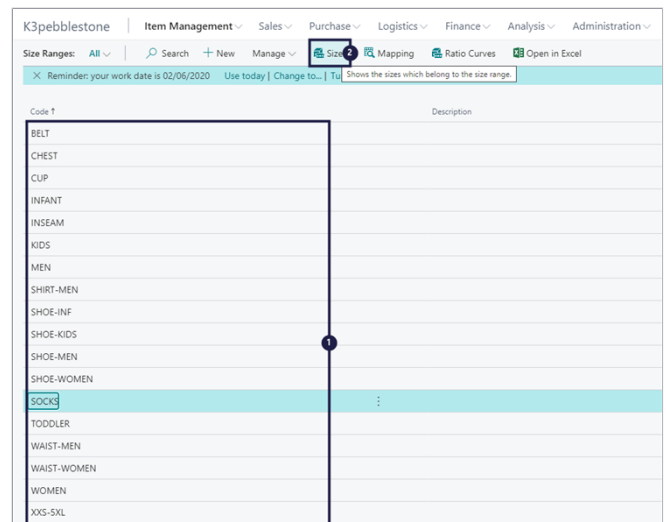
#### 2.4.1.1. Navigate to Sizes

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Sizes**.




#### 2.4.1.2. Sample size for all genders

1. Click on the cell **Code** on any row.
2. Click on the navigation menu item **Sizes**.



### Sample

Mark the field "Sample" for the size which is the default sample for all genders.

Change to...   Turn off reminder				
ete  Open in Excel				
Sorting ↑	Sample Gender Code	Sample	Copy to Item	
10		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
20		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
30		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
40		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

### Sample

Sorting ↑	Sample Gender Code	Sample	Copy to Item	
10		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
20		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
30		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
40		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
50		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
60		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
70		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
80		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
90		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
100		<input type="checkbox"/>	<input checked="" type="checkbox"/>	

When you want another size as default sample for all genders then mark the field "Sample" for the other size. In this case you get the following question:

40

40

50

→ 41

41

60

42


42

70

43

44

45

 Size Code 40 is already assigned as sample. Do you want to make Size Code 41 as the new sample instead?


Note: If you want samples per gender then you must fill the field Sample Gender Code instead of marking the field Sample.

Yes








No

- Click on the button **Yes**. When you click on the button No, Size 40 stays as default sample for all genders. When you click on the button Yes, Size 41 will become the default sample for all genders.


SIZE RANGE CODE SHIRT-MEN SIZE CODE 41

✓ SAVED 

Sizes

 Search  New  Edit List  Delete  Open in Excel  

Size Code	Description	Sorting ↑	Sample Gender Code	Sample	Copy to Item
36	36	10		<input type="checkbox"/>	<input checked="" type="checkbox"/>
37	37	20		<input type="checkbox"/>	<input checked="" type="checkbox"/>
38	38	30		<input type="checkbox"/>	<input checked="" type="checkbox"/>
39	39	40		<input type="checkbox"/>	<input checked="" type="checkbox"/>
40	40	50		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
→ 41	41	60		<input type="checkbox"/>	<input checked="" type="checkbox"/>
42	42	70		<input type="checkbox"/>	<input checked="" type="checkbox"/>
43				<input type="checkbox"/>	<input checked="" type="checkbox"/>
44				<input type="checkbox"/>	<input checked="" type="checkbox"/>
45				<input type="checkbox"/>	<input checked="" type="checkbox"/>

 Size Code 40 is already assigned as sample.  
Do you want to make Size Code 41 as the new sample instead?

Note: If you want samples per gender then you must fill the field Sample Gender Code instead of marking the field Sample.

Yes

No



### 2.4.1.3. Sample size on the item card

#### 1. Available Colors.

1. Sample.
2. Sample.
3. Choose the sample colors.  
Click on the button **Close**.

#### Available Samples

### 2.4.2. One sample size per gender

#### 2.4.2.1. Navigate to sizes

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **Size Ranges**.

#### 2.4.2.2. Samples sizes per gender

1. Click on the cell **Code** with the value **SHIRT**.
2. Click on the navigation menu item **Sizes**.

When you want to select one size as default sample for example gender Girls.

Click on the link in cell **Code** with the value **GIRLS**

Click on the link in cell **Code** with the value **BOYS**

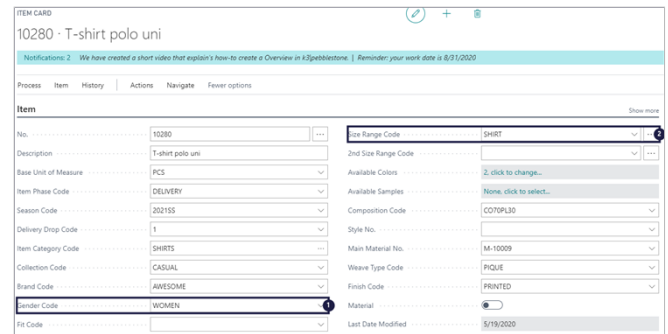
Click on the link in cell **Code** with the value **WOMEN**

Click on the link in cell **Code** with the value **MEN**

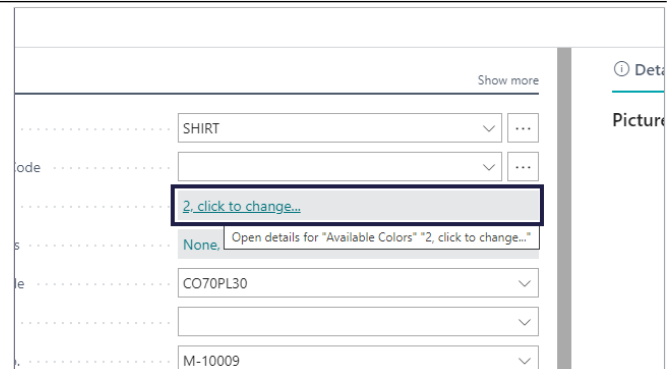
108/278

### 2.4.2.3. Samples size on item card

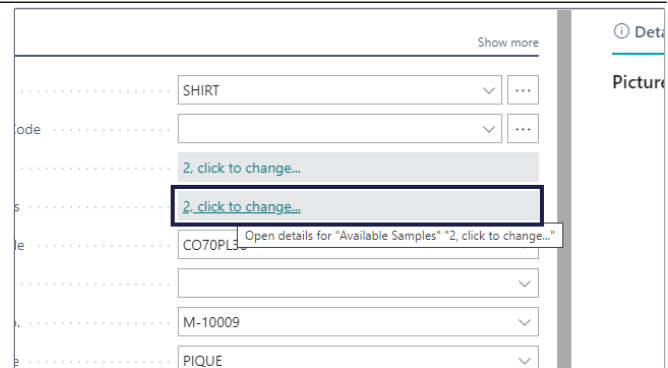
1. **Gender Code.**
2. **Size Range Code.**



#### Available Colors



#### Available Samples



## 2.5. Item calculations, landed cost BC25

### 2.5.1. Landed Cost BC25

Item calculation templates and item calculation worksheets help companies manage costs better, improve price transparency, and optimize profitability through accurate and consistent calculations.



The term 'landed cost' refers to the sum of expenses associated with shipping a product, such as taxes and fees for international shipping. If businesses sell their products at the landed cost, they will not make any profit.

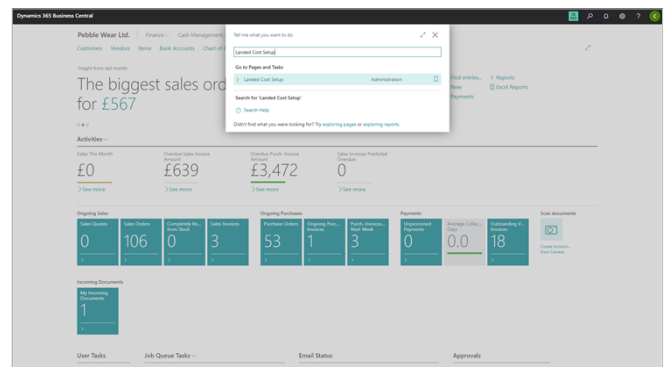


As such, it is crucial companies are able to determine their landed cost so they can price their products appropriately.

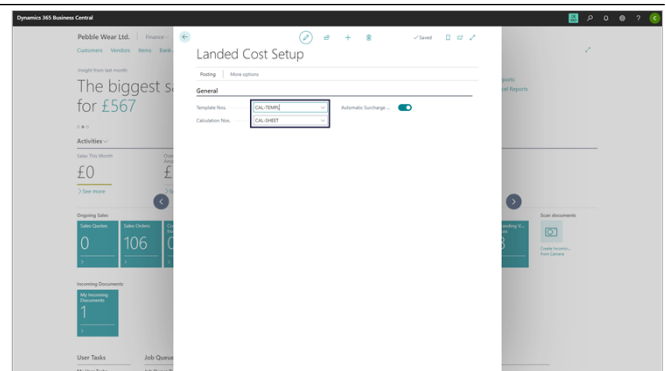


### 2.5.1.1. Landed Cost Setup

Search for Landed Cost Setup

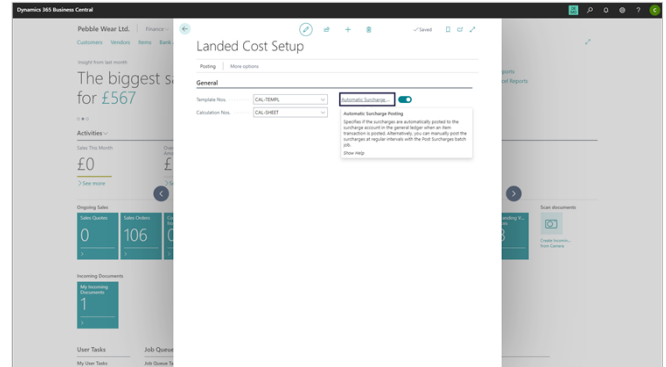


Specify the number series that will be used to assign numbers to template numbers. Specify the number series that will be used to assign numbers to calculation numbers.

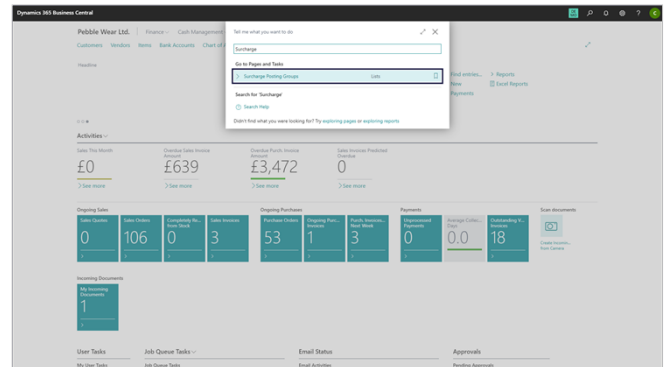


By creating surcharge posting groups and linking G/L accounts to them, it is possible to post coverages for calculated costs to the general ledger.

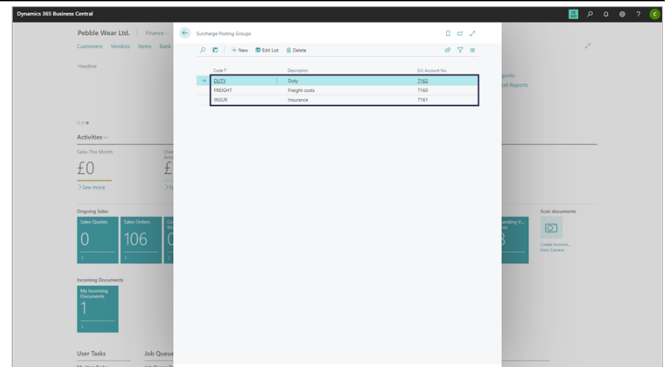
Specify if the surcharges are automatically posted to the surcharge account in the general ledger when an item transaction is posted.  
Alternatively, you can manually post the surcharges at regular intervals with the post Surcharges batch job.



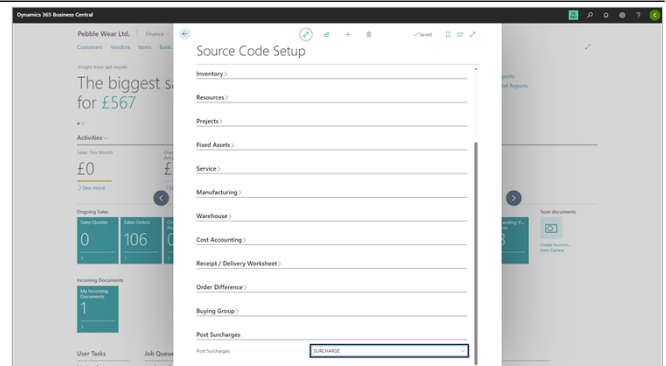
### Search for Surcharge Posting Groups



Set up Surcharge posting Groups and select a G/L Account from the G/L Account table.  
This can be any G/L Account No.



### Source Code Post Surcharges must be setup

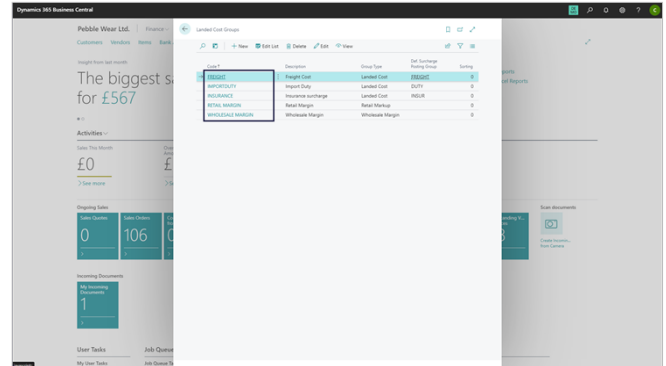


### 2.5.1.2. Landed Cost Groups

It is possible to create landed cost groups with landed cost group elements and assign them a surcharge posting group, which is linked to the coverage G/L account.

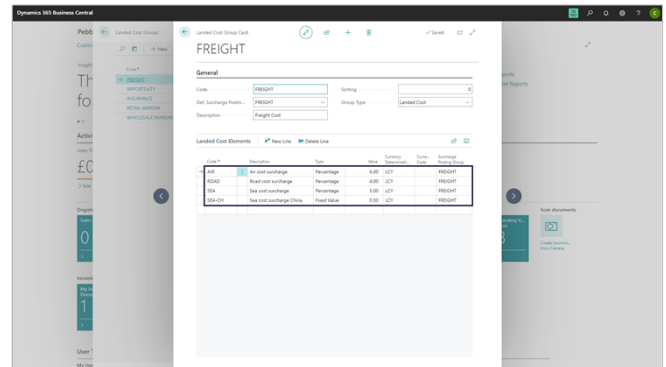
## K3 Pebblestone

Create the following Landed Cost Groups including the Landed Cost Elements



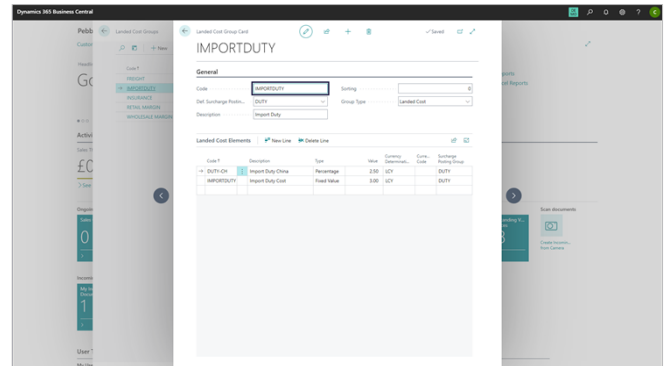
Code	Description	Group Type	Def. Surcharge Posting Group	Surcharge
FREIGHT	Freight Cost	Landed Cost	INSURANCE	0
IMPORTDUTY	Import Duty	Landed Cost	DUTY	0
INSURANCE	Insurance exchange	Landed Cost	INSUR	0
WHS-MARGIN	Warehouse Margin	Basic Margin	Basic Margin	0
WHOLESALE-MARGIN	Wholesale Margin	Wholesale Margin	Wholesale Margin	0

For each created landed cost group, you can create various options, including the corresponding fixed value or percentage and surcharge posting group. Like for FREIGHT:



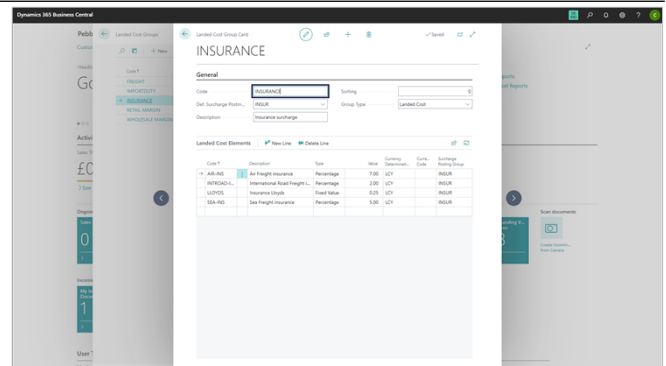
Code	Description	Type	Value	Surcharge Posting Group	Surcharge
IMP	Freight exchange	Percentage	1.00	INSUR	INSUR
IMP-CH	Freight exchange China	Percentage	1.00	INSUR	INSUR
IMP-CH	Freight exchange China	Fixed Value	1.00	INSUR	INSUR

The following elements could be created under IMPORTDUTY



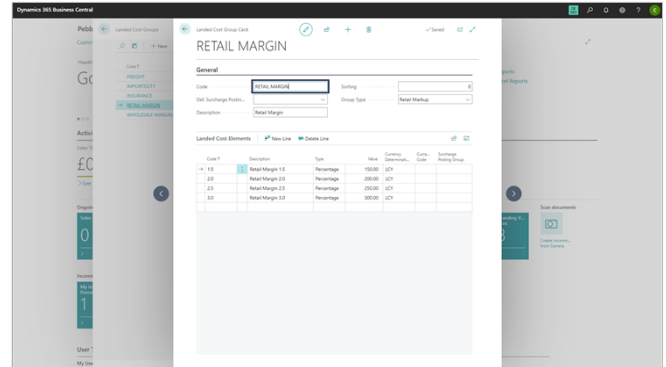
Code	Description	Type	Value	Surcharge Posting Group	Surcharge
IMP-CH	Import Duty China	Percentage	1.00	INSUR	INSUR
IMP-CH	Import Duty China	Fixed Value	1.00	INSUR	INSUR

The following elements could be created under INSURANCE



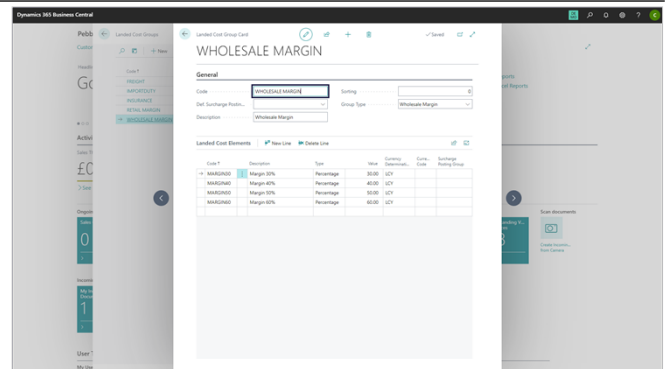
Code	Description	Type	Value	Surcharge Posting Group	Surcharge
IMP-CH	Insurance exchange	Percentage	1.00	INSUR	INSUR
IMP-CH	Insurance exchange	Fixed Value	1.00	INSUR	INSUR

The following elements could be created under  
RETAIL MARGIN



Cost #	Description	Type	Value	Control	Formula	Group
1.1	Retail Margin 1.5	Percentage	150.00	LCY		
2.0	Retail Margin 2.0	Percentage	200.00	LCY		
2.1	Retail Margin 2.1	Percentage	200.00	LCY		
3.0	Retail Margin 3.0	Percentage	300.00	LCY		

The following elements could be created under  
WHOLESALE MARGIN



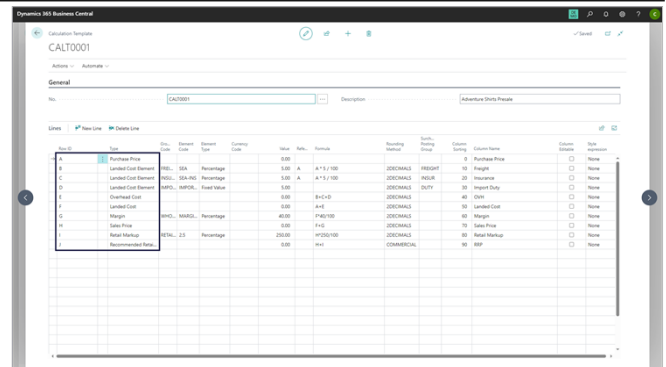
Cost #	Description	Type	Value	Control	Formula	Group
1.1	Margin 50%	Percentage	50.00	LCY		
1.2	Margin 40%	Percentage	40.00	LCY		
1.3	Margin 30%	Percentage	30.00	LCY		
1.4	Margin 20%	Percentage	20.00	LCY		

### 2.5.1.3. Calculation Templates

In the Calculation Template, the calculation can be defined from purchase price, landed cost, and sales price, all the way through to the recommended retail price.

Customers can create as many Calculation Templates as needed to speed up the creation of new price calculations.

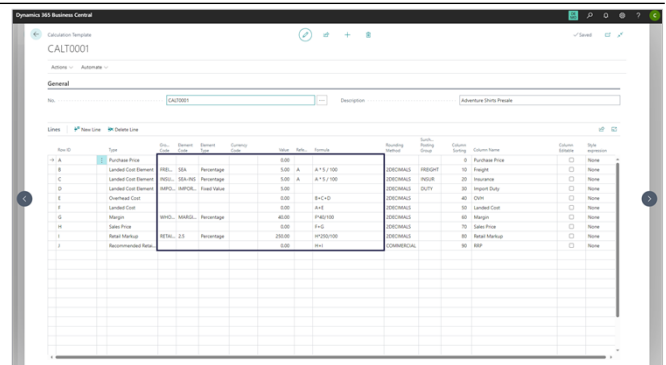
The 'Row ID' can be chosen freely, and the 'Type' column links to the field on the item card in Business Central. The 'Column Name' is the final display in the calculation scheme.



Row ID	Type	Control	Value	Formula	Group	Column Name	Column
1	Purchase Price	PERC	5.00	A * 1.1 / 100	PERCENT	Purchase Price	1
2	Landed Cost Element	PERC	5.00	A * 1.1 / 100	PERCENT	Freight	2
3	Landed Cost Element	PERC	5.00	A * 1.1 / 100	PERCENT	Insurance	3
4	Landed Cost Element	PERC	5.00	A * 1.1 / 100	PERCENT	Import Duty	4
5	Landed Cost	PERC	5.00	A * 1.1 / 100	PERCENT	LCY	5
6	Margin	PERC	40.00	P * 40 / 100	PERCENT	Margin	6
7	Sales Price	PERC	5.00	P * 1.1 / 100	PERCENT	Sales Price	7
8	Retail Markup	PERC	20.00	P * 20 / 100	PERCENT	Retail Markup	8
9	Recommended Retail	PERC	5.00	P * 1.1 / 100	PERCENT	RSP	9

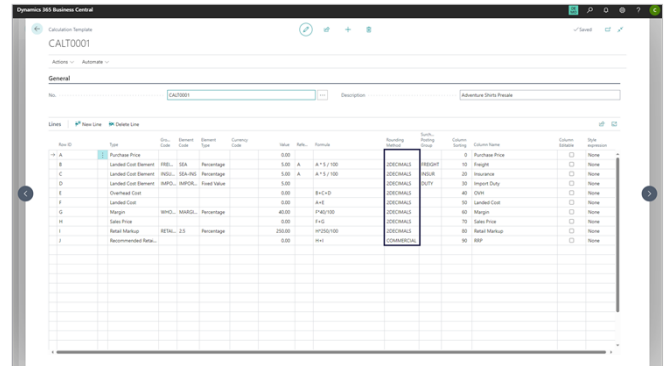
The structure of the calculation lines can be customized as desired, using predefined Landed Cost Groups and Elements.

By utilizing the 'Reference,' where a previously mentioned Row ID can be filled in, the 'Formula' is automatically generated.



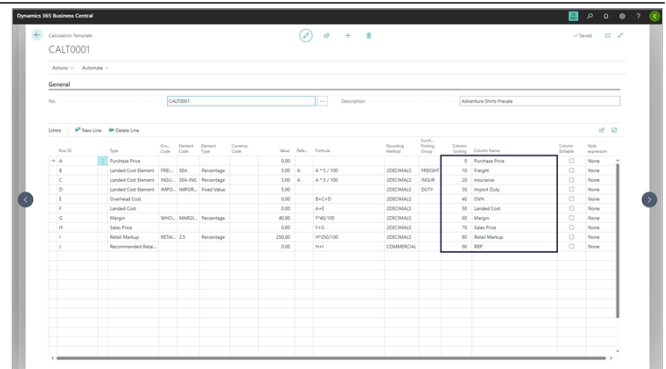
Row ID	Type	Control	Value	Formula	Group	Column Name	Column
1	Purchase Price	PERC	5.00	A * 1.1 / 100	PERCENT	Purchase Price	1
2	Landed Cost Element	PERC	5.00	A * 1.1 / 100	PERCENT	Freight	2
3	Landed Cost Element	PERC	5.00	A * 1.1 / 100	PERCENT	Insurance	3
4	Landed Cost Element	PERC	5.00	A * 1.1 / 100	PERCENT	Import Duty	4
5	Landed Cost	PERC	5.00	A * 1.1 / 100	PERCENT	LCY	5
6	Margin	PERC	40.00	P * 40 / 100	PERCENT	Margin	6
7	Sales Price	PERC	5.00	P * 1.1 / 100	PERCENT	Sales Price	7
8	Retail Markup	PERC	20.00	P * 20 / 100	PERCENT	Retail Markup	8
9	Recommended Retail	PERC	5.00	P * 1.1 / 100	PERCENT	RSP	9

By creating rounding methods, the correct rounding can be achieved



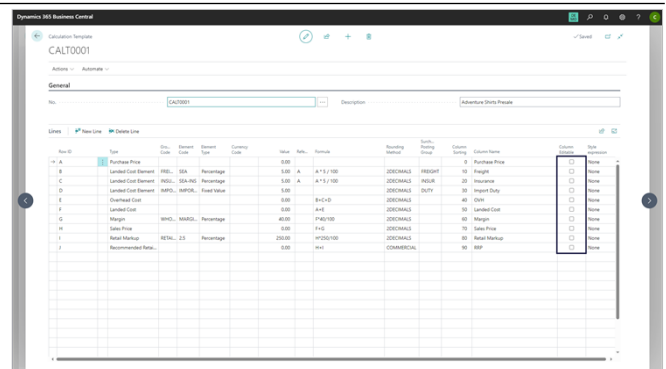
Line ID	Type	Description	Unit	Formula	Rounding Method	Column Name
A	Purchase Price				ROUND	Purchase Price
B	Landed Cost Element	INSURANCE		A * 1.1 / 100	ROUND	Insurance
C	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
D	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
E	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
F	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
G	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
H	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
I	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
J	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
K	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
L	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
M	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
N	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
O	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
P	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
Q	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
R	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
S	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
T	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
U	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
V	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
W	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
X	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
Y	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty
Z	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty

By placing a number in the 'Column Sorting' column it is possible to indicate that a calculation template row should appear as a user-defined column in the Item Calculation Sheet. By leaving the number in the 'Column Sorting' column blank, it will not appear in the Item Calculation Sheet.



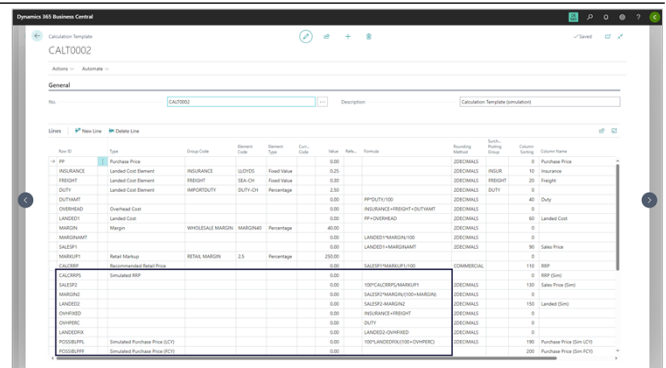
Line ID	Type	Description	Unit	Formula	Rounding Method	Column Name	Column Sorting
A	Purchase Price				ROUND	Purchase Price	1
B	Landed Cost Element	INSURANCE		A * 1.1 / 100	ROUND	Insurance	2
C	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
D	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
E	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
F	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
G	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
H	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
I	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
J	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
K	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
L	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
M	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
N	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
O	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
P	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
Q	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
R	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
S	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
T	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
U	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
V	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
W	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
X	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
Y	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2
Z	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	2

When Column Editable is set to true, users can change the values in the columns in the Item Calculation Sheet. Please note that this field can not be set to true if the template line contains a formula.



Line ID	Type	Description	Unit	Formula	Rounding Method	Column Name	Column Editable
A	Purchase Price				ROUND	Purchase Price	true
B	Landed Cost Element	INSURANCE		A * 1.1 / 100	ROUND	Insurance	false
C	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
D	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
E	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
F	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
G	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
H	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
I	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
J	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
K	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
L	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
M	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
N	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
O	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
P	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
Q	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
R	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
S	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
T	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
U	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
V	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
W	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
X	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
Y	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
Z	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false

It is also possible to create a calculation template for a simulated recommended retail price back to a potential purchase price



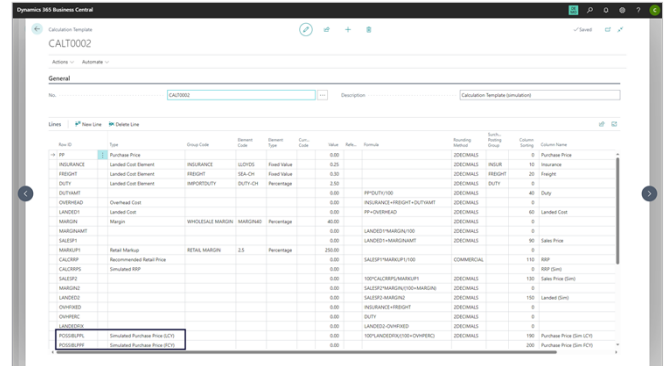
Line ID	Type	Description	Unit	Formula	Rounding Method	Column Name	Column Editable
A	Purchase Price				ROUND	Purchase Price	true
B	Landed Cost Element	INSURANCE		A * 1.1 / 100	ROUND	Insurance	false
C	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
D	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
E	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
F	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
G	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
H	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
I	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
J	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
K	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
L	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
M	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
N	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
O	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
P	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
Q	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
R	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
S	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
T	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
U	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
V	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
W	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
X	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
Y	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false
Z	Landed Cost Element	IMPORT DUTY		A * 1.1 / 100	ROUND	Import Duty	false



### K3 Pebblestone

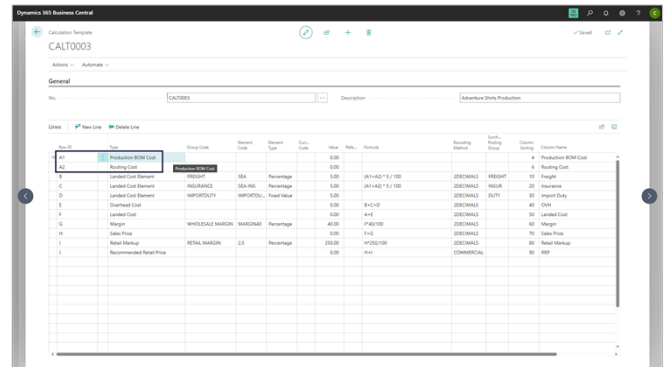
By manually entering the simulated recommended retail price and setting the correct formulas, it is possible to calculate back to the intended purchase price.

When calculating backwards, the calculated purchase price can be converted to foreign currency by using type Simulated Purchase Price FCY. The exchange rate for the currency must be defined in the Item Calculation Sheet.



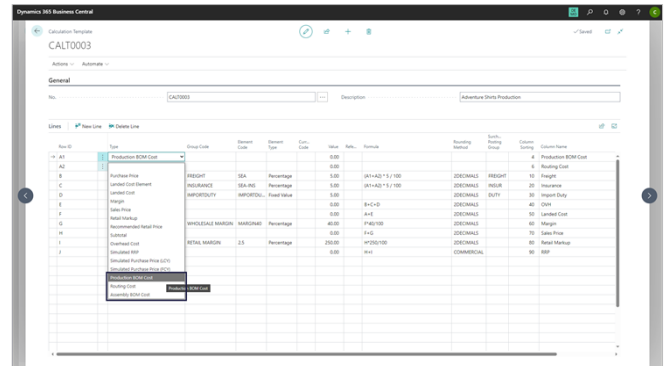
Line No.	Type	Group Code	Item Code	Item Name	Unit Cost	Value	Rate	Formula	Quantity	Unit Price	Column Name
1	Purchase Price					0.00					Purchase Price
2	Insurance	INSURANCE	INSUR	Insurance	10.00	10.00					Insurance
3	Freight	FREIGHT	FREIGHT	Freight	20.00	20.00					Freight
4	Landfill	LANDFILL	LANDFILL	Landfill	5.00	5.00					Landfill
5	Overhead	OVERHEAD	OVERHEAD	Overhead	40.00	40.00					Overhead
6	Margin	MARGIN	MARGIN	Margin	40.00	40.00					Margin
7	Recommended Retail Price	RETAIL PRICE	RETAIL PRICE	Recommended Retail Price	200.00	200.00					Recommended Retail Price
8	Simulated Purchase Price FCY			Simulated Purchase Price FCY	0.00	0.00					Simulated Purchase Price FCY

The following calculation template could be created based on the Production BOM cost and Routing cost, or on the Assembly BOM cost



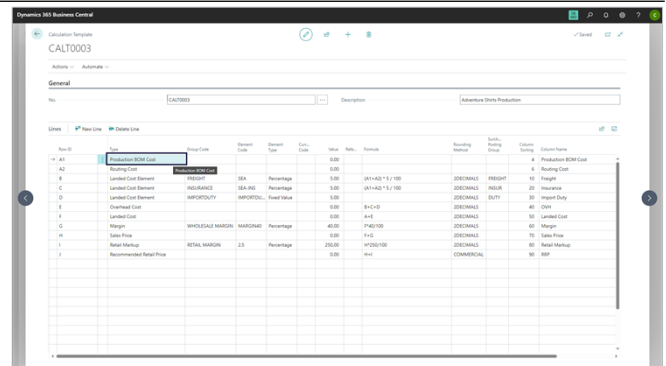
Line No.	Type	Group Code	Item Code	Item Name	Unit Cost	Value	Rate	Formula	Quantity	Unit Price	Column Name
1	Production BOM Cost					0.00					Production BOM Cost
2	Routing Cost					0.00					Routing Cost
3	Assembly BOM Cost					0.00					Assembly BOM Cost
4	Insurance	INSURANCE	INSUR	Insurance	10.00	10.00					Insurance
5	Freight	FREIGHT	FREIGHT	Freight	20.00	20.00					Freight
6	Landfill	LANDFILL	LANDFILL	Landfill	5.00	5.00					Landfill
7	Overhead	OVERHEAD	OVERHEAD	Overhead	40.00	40.00					Overhead
8	Margin	MARGIN	MARGIN	Margin	40.00	40.00					Margin
9	Recommended Retail Price	RETAIL PRICE	RETAIL PRICE	Recommended Retail Price	200.00	200.00					Recommended Retail Price
10	Simulated Purchase Price FCY			Simulated Purchase Price FCY	0.00	0.00					Simulated Purchase Price FCY

The current calculation is based on items. Since in Production Boms and Assembly Boms, final items and materials are recorded per variant, the calculation for each item will be based on the default variant (color,size,second size combination) of the final item.



Line No.	Type	Group Code	Item Code	Item Name	Unit Cost	Value	Rate	Formula	Quantity	Unit Price	Column Name
1	Production BOM Cost					0.00					Production BOM Cost
2	Routing Cost					0.00					Routing Cost
3	Assembly BOM Cost					0.00					Assembly BOM Cost
4	Insurance	INSURANCE	INSUR	Insurance	10.00	10.00					Insurance
5	Freight	FREIGHT	FREIGHT	Freight	20.00	20.00					Freight
6	Landfill	LANDFILL	LANDFILL	Landfill	5.00	5.00					Landfill
7	Overhead	OVERHEAD	OVERHEAD	Overhead	40.00	40.00					Overhead
8	Margin	MARGIN	MARGIN	Margin	40.00	40.00					Margin
9	Recommended Retail Price	RETAIL PRICE	RETAIL PRICE	Recommended Retail Price	200.00	200.00					Recommended Retail Price
10	Simulated Purchase Price FCY			Simulated Purchase Price FCY	0.00	0.00					Simulated Purchase Price FCY

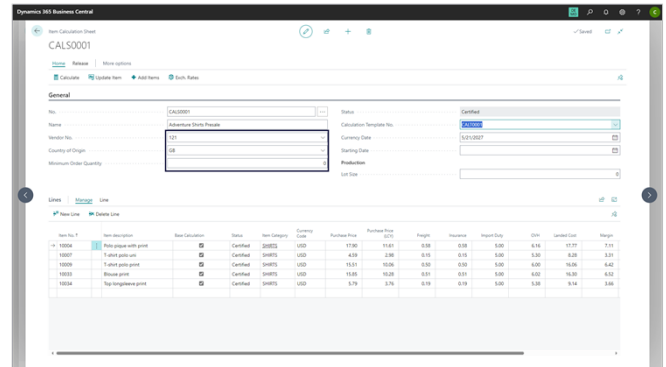
Based on the Production Bom material quantities, the Production Routing quantities and the Assembly Bom material quantities from the default size and default color, the purchasing costs (Unit Cost) of all underlying materials and operations are added together (cost per material and operations multiplied by Quantity Per) and shown in the Production Bom cost, Production Routing cost and Assembly Bom cost calculation line and included in the item calculation.



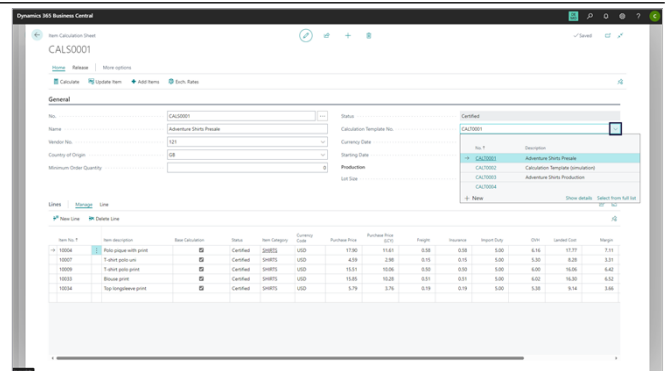
Line No.	Type	Group Code	Item Code	Item Name	Unit Cost	Value	Rate	Formula	Quantity	Unit Price	Column Name
1	Production BOM Cost					0.00					Production BOM Cost
2	Routing Cost					0.00					Routing Cost
3	Assembly BOM Cost					0.00					Assembly BOM Cost
4	Insurance	INSURANCE	INSUR	Insurance	10.00	10.00					Insurance
5	Freight	FREIGHT	FREIGHT	Freight	20.00	20.00					Freight
6	Landfill	LANDFILL	LANDFILL	Landfill	5.00	5.00					Landfill
7	Overhead	OVERHEAD	OVERHEAD	Overhead	40.00	40.00					Overhead
8	Margin	MARGIN	MARGIN	Margin	40.00	40.00					Margin
9	Recommended Retail Price	RETAIL PRICE	RETAIL PRICE	Recommended Retail Price	200.00	200.00					Recommended Retail Price
10	Simulated Purchase Price FCY			Simulated Purchase Price FCY	0.00	0.00					Simulated Purchase Price FCY

### 2.5.1.4. Item Calculation Sheet

In the Item Calculation Sheet, using a selected Calculation Template, item calculations with the same structure can be created for multiple items at once. These can be defined per vendor, country of origin, or minimum order quantity. It is possible to setup currency rates for vendors which trade with a different currency.



When creating an Item Calculation Sheet for a specific group of items, a previously created Calculation Template must be applied. For all items added in the underlying lines, the calculation elements from the template will be adopted.

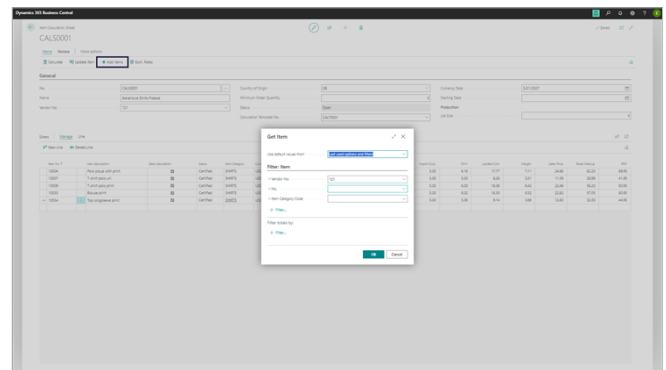


#### 2.5.1.4.1. Add items to the calculation sheet

In the ribbon, the option "Add items" is available. After choosing this option a report is opened in which you can set filters.

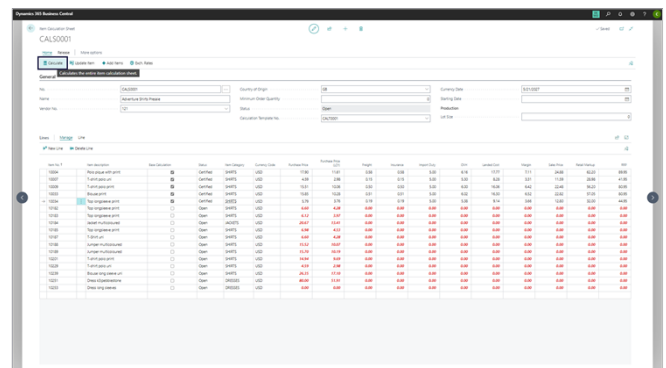
For example, the following filters can be set to add items as calculation sheet lines :

- Vendor Number
- Item Category
- Brand

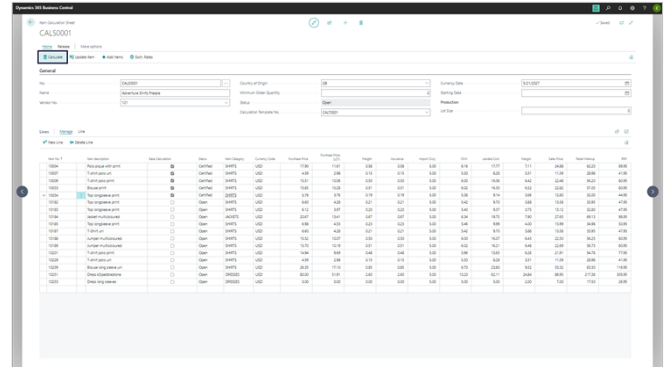


#### 2.5.1.4.2. Calculate item lines in the calculation sheet

Values that have not yet been calculated are displayed in red and italicized. In the ribbon, the option Calculate is available.



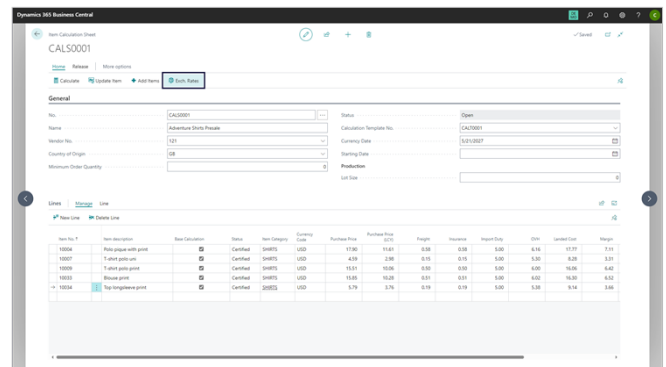
The lines are calculated using the data from elements in the linked calculation template. Calculated values are displayed in black and upright.



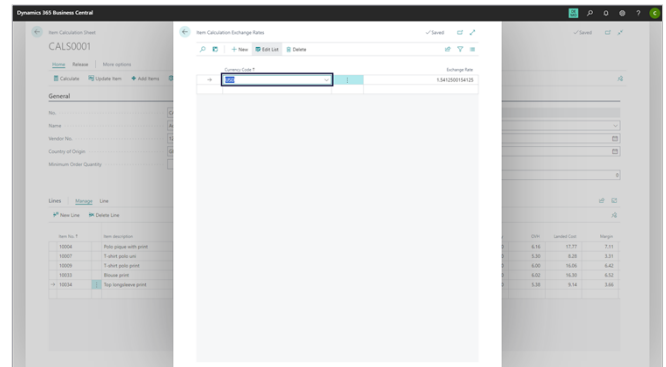
### 2.5.1.4.3.

### Currency Rate and Base calculation

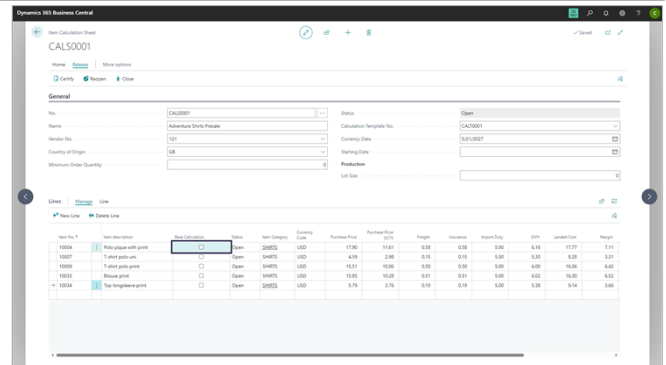
Currency rates must be filled in on the Currency Date for all currencies used in the Item Calculation Sheet.



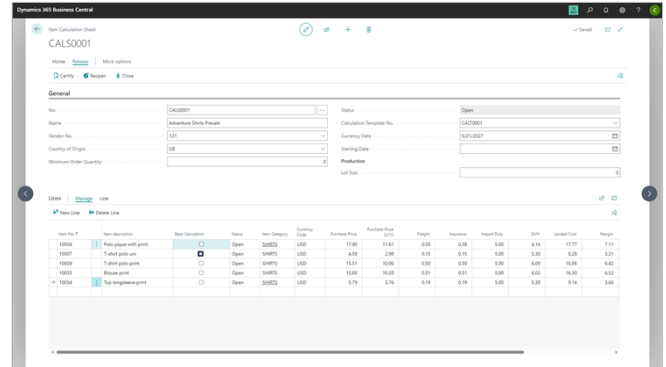
After entering the currency code, the currency rate is taken from the exchange rate setup but can be changed manually



It is possible to set the Base Calculation on an item if this item already has a base calculation indicator in another calculation sheet.



If so, the Base Calculation in the other calculation sheet will be removed, even if the status on that line is not Open, and it will be set in the current calculation sheet.



**Item Calculation Sheet: CAL50001**

**General**

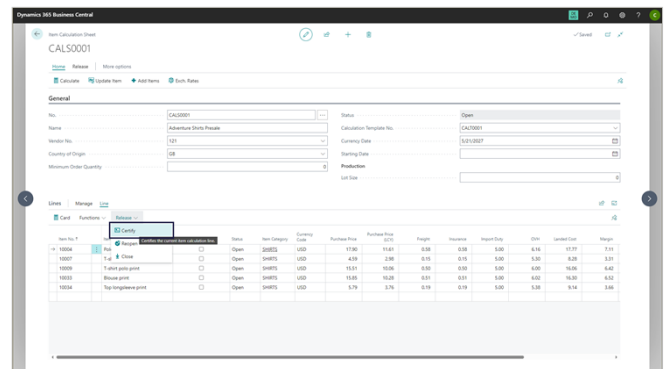
No.: CAL50001 Status: Open  
 Name: Adventure Sports Products Calculation Template No.: CAL70001  
 Number No.: 121 Currency Date: 5/21/2025  
 Country of Origin: US Starting Date:  
 Minimum Order Quantity: 0 Production Lot Size:

**Lines**

Item No.	Item Description	Base Calculation	Status	Item Category	Country Code	Purchase Price	Purchase Price (USD)	Weight	Volume	Weight (kg)	Volume (m³)	Unit Cost	Margin
10004	Pink piggy bank with prize	Open	Open	20000	USD	17.00	17.00	0.08	0.08	0.08	0.08	6.14	17.00
10007	T-shirt piggy bank	Open	Open	20000	USD	4.39	4.39	0.10	0.10	0.10	0.10	5.20	4.39
10009	T-shirt piggy bank	Open	Open	20000	USD	15.11	15.11	0.08	0.08	0.08	0.08	16.00	15.11
10010	Blue piggy bank	Open	Open	20000	USD	15.15	15.15	0.10	0.10	0.10	0.10	16.00	15.15
10014	Top long-sleeved shirt	Open	Open	20000	USD	5.79	5.79	0.10	0.10	0.10	0.10	5.80	5.79

## 2.5.1.4.4. Certify and Close calculation sheet

When creating a new Item Calculation Sheet, the status is 'Open'.  
 Once everything in the Item Calculation Sheet is completed and ready for use, the status should be changed to 'Certified'.  
 Before certifying the whole sheet, it is possible to certify each item line individually.



**Item Calculation Sheet: CAL50001**

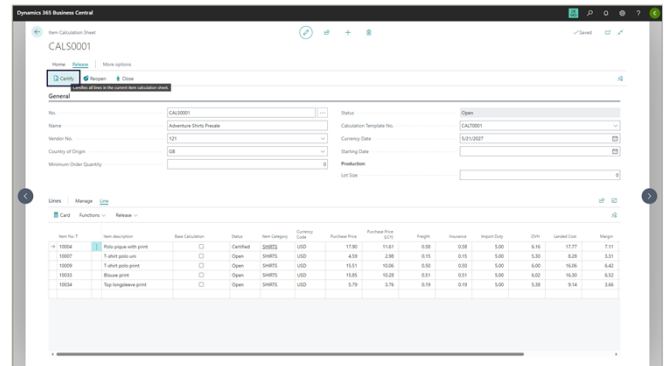
**General**

No.: CAL50001 Status: Open  
 Name: Adventure Sports Products Calculation Template No.: CAL70001  
 Number No.: 121 Currency Date: 5/21/2025  
 Country of Origin: US Starting Date:  
 Minimum Order Quantity: 0 Production Lot Size:

**Lines**

Item No.	Item Description	Base Calculation	Status	Item Category	Country Code	Purchase Price	Purchase Price (USD)	Weight	Volume	Weight (kg)	Volume (m³)	Unit Cost	Margin
10004	Pink piggy bank with prize	Open	Open	20000	USD	17.00	17.00	0.08	0.08	0.08	0.08	6.14	17.00
10007	T-shirt piggy bank	Open	Open	20000	USD	4.39	4.39	0.10	0.10	0.10	0.10	5.20	4.39
10009	T-shirt piggy bank	Open	Open	20000	USD	15.11	15.11	0.08	0.08	0.08	0.08	16.00	15.11
10010	Blue piggy bank	Open	Open	20000	USD	15.15	15.15	0.10	0.10	0.10	0.10	16.00	15.15
10014	Top long-sleeved shirt	Open	Open	20000	USD	5.79	5.79	0.10	0.10	0.10	0.10	5.80	5.79

It is also possible to certify all items in the sheet by certifying the entire calculation sheet



**Item Calculation Sheet: CAL50001**

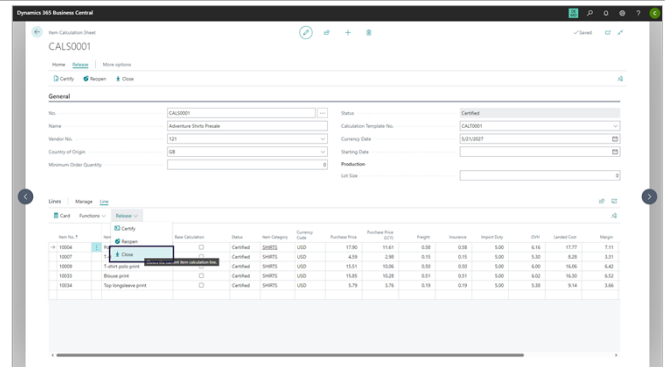
**General**

No.: CAL50001 Status: Open  
 Name: Adventure Sports Products Calculation Template No.: CAL70001  
 Number No.: 121 Currency Date: 5/21/2025  
 Country of Origin: US Starting Date:  
 Minimum Order Quantity: 0 Production Lot Size:

**Lines**

Item No.	Item Description	Base Calculation	Status	Item Category	Country Code	Purchase Price	Purchase Price (USD)	Weight	Volume	Weight (kg)	Volume (m³)	Unit Cost	Margin
10004	Pink piggy bank with prize	Open	Open	20000	USD	17.00	17.00	0.08	0.08	0.08	0.08	6.14	17.00
10007	T-shirt piggy bank	Open	Open	20000	USD	4.39	4.39	0.10	0.10	0.10	0.10	5.20	4.39
10009	T-shirt piggy bank	Open	Open	20000	USD	15.11	15.11	0.08	0.08	0.08	0.08	16.00	15.11
10010	Blue piggy bank	Open	Open	20000	USD	15.15	15.15	0.10	0.10	0.10	0.10	16.00	15.15
10014	Top long-sleeved shirt	Open	Open	20000	USD	5.79	5.79	0.10	0.10	0.10	0.10	5.80	5.79

When an Item Calculation Sheet is no longer needed, its status should be 'Closed'.  
 Before closing the whole sheet, it is possible to close each item line individually.



**Item Calculation Sheet: CAL50001**

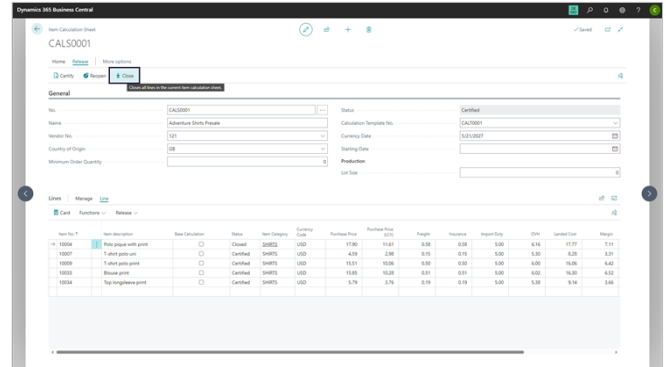
**General**

No.: CAL50001 Status: Closed  
 Name: Adventure Sports Products Calculation Template No.: CAL70001  
 Number No.: 121 Currency Date: 5/21/2025  
 Country of Origin: US Starting Date:  
 Minimum Order Quantity: 0 Production Lot Size:

**Lines**

Item No.	Item Description	Base Calculation	Status	Item Category	Country Code	Purchase Price	Purchase Price (USD)	Weight	Volume	Weight (kg)	Volume (m³)	Unit Cost	Margin
10004	Pink piggy bank with prize	Open	Certified	20000	USD	17.00	17.00	0.08	0.08	0.08	0.08	6.14	17.00
10007	T-shirt piggy bank	Open	Certified	20000	USD	4.39	4.39	0.10	0.10	0.10	0.10	5.20	4.39
10009	T-shirt piggy bank	Open	Certified	20000	USD	15.11	15.11	0.08	0.08	0.08	0.08	16.00	15.11
10010	Blue piggy bank	Open	Certified	20000	USD	15.15	15.15	0.10	0.10	0.10	0.10	16.00	15.15
10014	Top long-sleeved shirt	Open	Certified	20000	USD	5.79	5.79	0.10	0.10	0.10	0.10	5.80	5.79

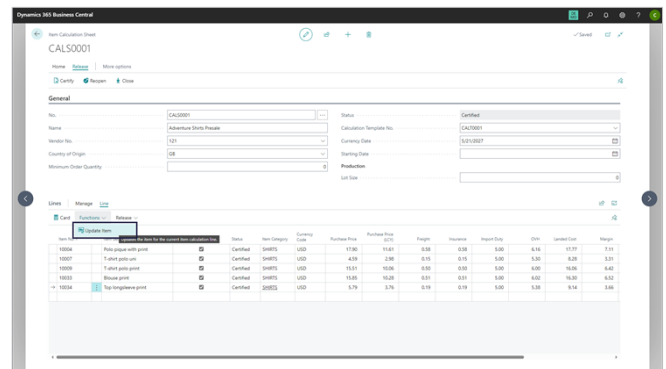
It is possible to close a complete sheet and create a new one for a new season.  
Calculations with status closed cannot be used anymore.



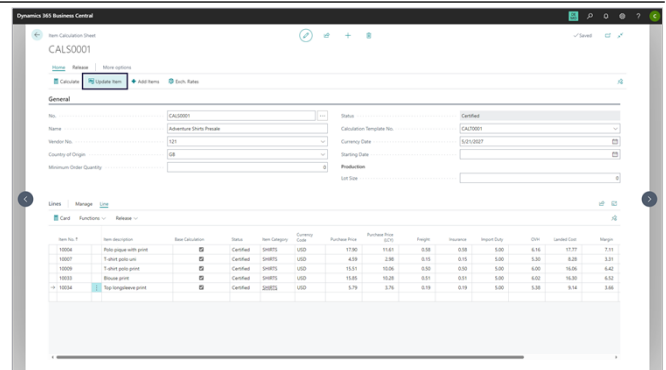
## 2.5.1.4.5. Update Item Card

Once an item in the Item Calculation Sheet is Certified, it is possible to update each item card individually.

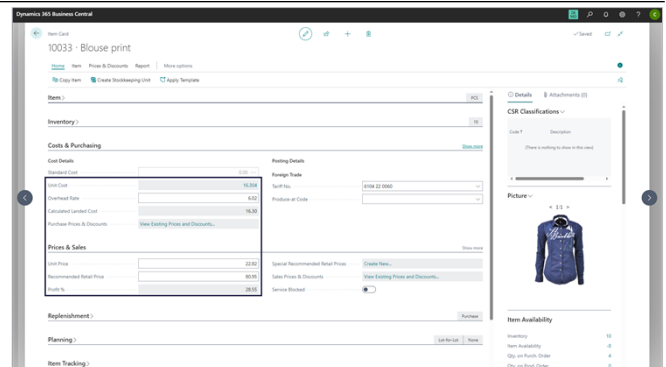
When the field “Base Calculation” is marked, the fields Purchase price – Last Direct Cost, Sales Price – Unit price, Recommended Retail Price - RRP are transferred from Item Calculation Sheet line to the item card



It is also possible to update the item cards for all items in the calculation sheet. An item calculation for all items in the Item Calculation Sheet will be created or updated.

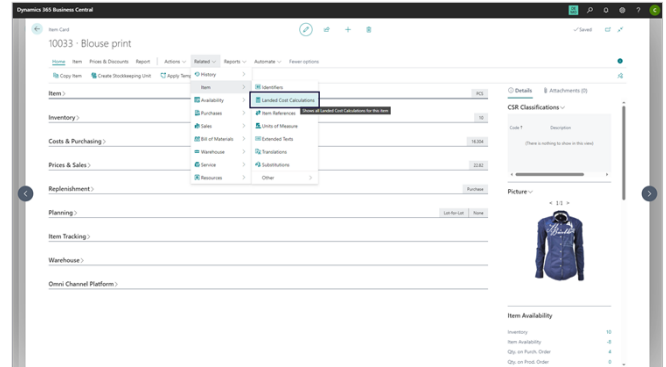


Calculated fields can be changed on the item card before any postings are made. After the first posting, these fields on the item card can no longer be updated, similar to standard Business Central functionality.

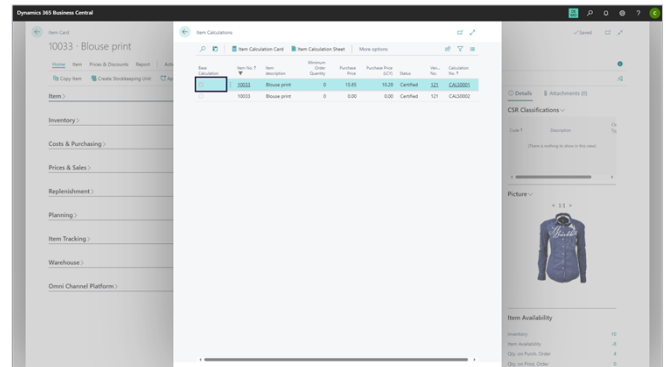


## K3 Pebblestone

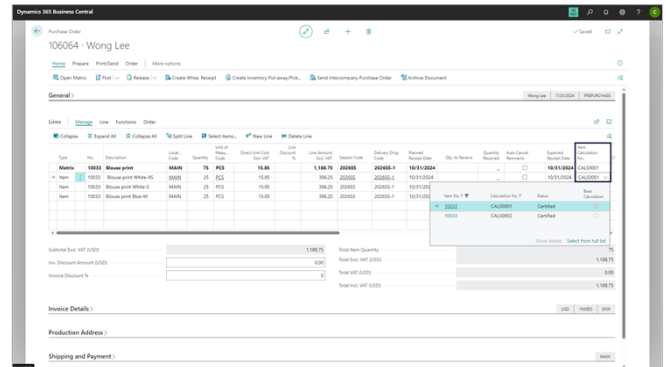
It is possible to display multiple linked calculations for the same item from the item card.



The item calculation where the "Base Calculation" field is checked will be used when posting the purchase invoice, allowing the correct coverage G/L accounts to be incremented based on the surcharge posting groups in this item calculation.

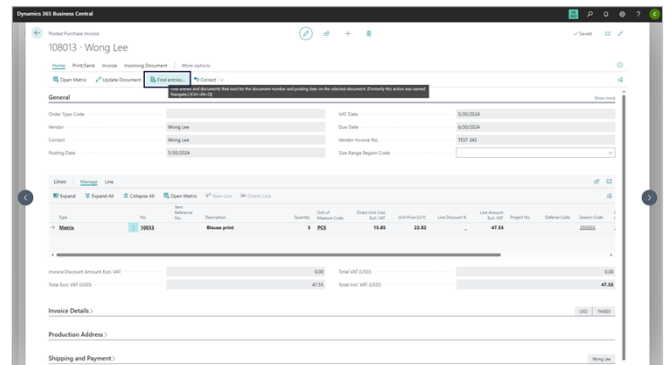


When multiple item calculation numbers are linked to an item, you can choose a different item calculation in the purchase order line than the default base item calculation.



### 2.5.1.5. Posted purchase invoice

For the entries linked to the Posted Purchase Invoice, it is visible that the surcharges are allocated to the G/L accounts as set in the Surcharge Posting Groups.



[illegible]

Check if the surcharges are allocated to the G/L accounts as set in the Surcharge Posting Groups

[illegible]

The surcharge G/L accounts are increased when posting, with the overhead account as the counterpart. At the end of each period, these surcharge accounts need to be cleared against the actual cost accounts. If differences arise between the accumulated surcharge amounts and the accumulated actual costs, the surcharge percentages and amounts can be adjusted for the next period.

The landed cost functionality in K3 Pebblestone for Microsoft Business Central optimizes cost management for fashion brands. It provides detailed tracking, advanced filtering, and financial insights to accurately calculate total product costs. This ensures better control over procurement, pricing, and profitability, enhancing overall operational efficiency and decision-making.





## 2.6. Item prices and discounts BC25

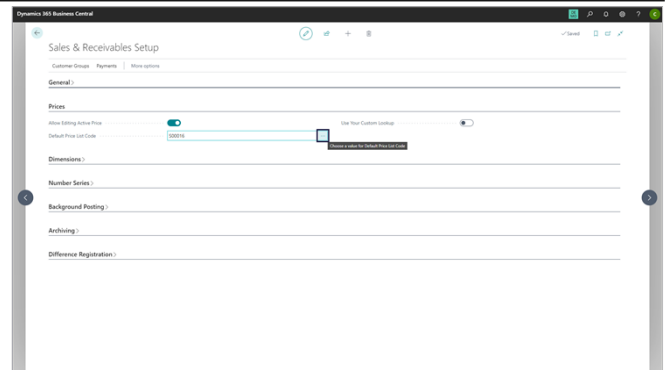
### 2.6.1. Sales prices BC25

Special sales prices and discounts provide flexibility and efficiency in managing pricing strategies. They enable the definition of customer-specific prices, volume-based discounts, and time-limited promotions. Prices and discounts can be set based on criteria such as customer groups, item categories, currencies, and date ranges. This ensures accurate pricing, supports diverse sales models, and reduces manual adjustments.

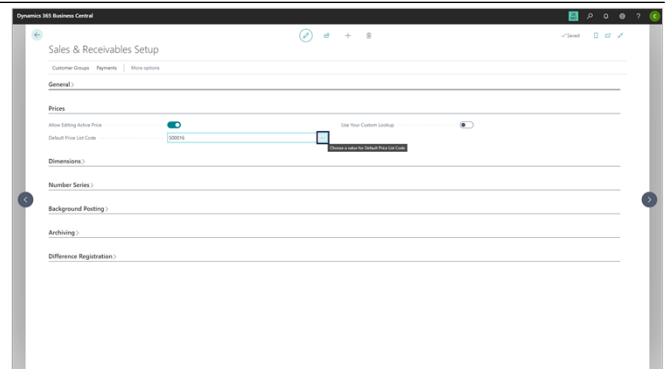


The Sales & Receivable Setup can be started by searching for it.

To allow to edit prices on active price lists for items, resources, customers, or other entities that use pricing, turn on the Allow Editing Active Price toggle.

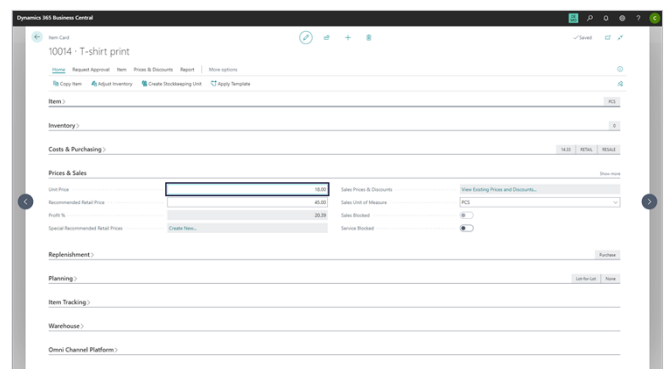


Field Default Price List Code specifies the code of the existing sales price list that stores all new price lines created in the price worksheet page.



#### 2.6.1.1. Default sales price and special sales price lists

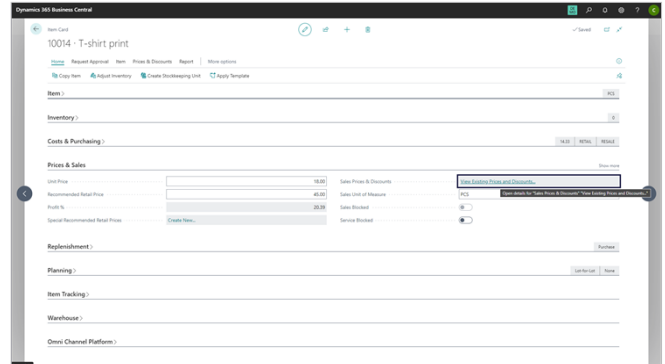
The default sales price of an item can be entered in the Unit Price field on the item card.



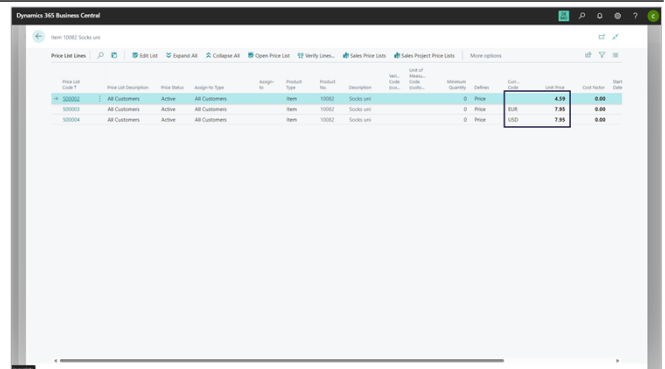


### K3 Pebblestone

It is possible to create special sales price lists where a specific price, different from the default, can be set for an item.

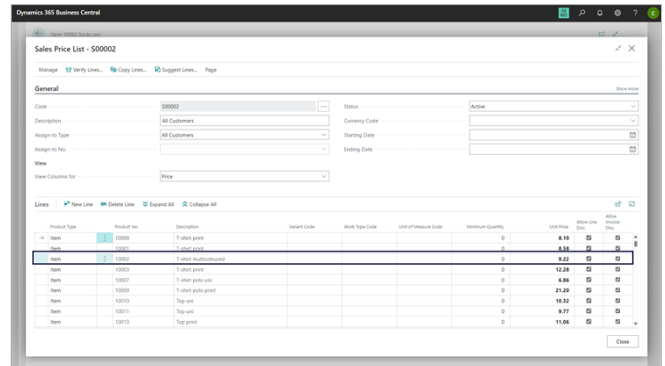


It is possible to add the same item to multiple price lists, such as a price list for all customers, a specific customer price group like a country, a particular customer, or a specific campaign. The item price can be defined for each price list in a different currency, for a specific period, unit of measure, or minimum quantity.

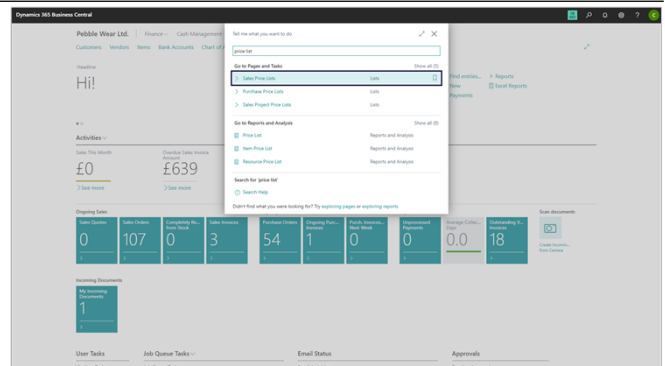


Price List	Product No.	Description	Variant Code	Work Type Code	Unit of Measure Code	Minimum Quantity	Unit Price	Price
10002	10002	T-shirt print				0	10.00	10.00
10003	10002	T-shirt print				0	10.00	10.00
10004	10002	T-shirt print				0	10.00	10.00

By opening a price list, you can adjust the price of an item on that specific list. To do this, the price list must be in Draft status, and after making the adjustment, it should be set to Active.



The Sales Price Lists can also be started by searching for it.



Dynamics 365 Business Central									
Sales Price List									
New    Manage									
Task #	Description		Status	How many items?	Status	Currency	Assign to?	Assign to	Ending Date
100000	1	Default Price List	Active	<input type="checkbox"/>	Price & Discount				
100001	All Customers		Active	<input type="checkbox"/>	Price	EUR	All Customers		
100002	All Customers		Active	<input type="checkbox"/>	Price	EUR	All Customers		
100003	All Customers		Active	<input type="checkbox"/>	Price	USD	All Customers		
100004	Customer Price Group EU		Active	<input type="checkbox"/>	Price & Discount	EUR	Customer Price Group EU		
100005	Customer Price Group EU		Active	<input type="checkbox"/>	Price & Discount	EUR	Customer Price Group EU		
100006	Customer Price Group EU		Active	<input type="checkbox"/>	Price & Discount	USD	Customer Price Group EU		
100007	Customer Price Group EU		Active	<input type="checkbox"/>	Price & Discount	USD	Customer Price Group EU		
100008	Customer Price Group NATIONAL		Active	<input type="checkbox"/>	Price & Discount	EUR	Customer Price Group NATIONAL		
100009	Customer Price Group NATIONAL		Active	<input type="checkbox"/>	Price	EUR	Customer Price Group NATIONAL		
100010	Customer Price Group NATIONAL		Active	<input type="checkbox"/>	Price	USD	Customer Price Group NATIONAL		
100011	Customer Price Group NARTESIAE		Active	<input type="checkbox"/>	Price & Discount	EUR	Customer Price Group NARTESIAE		
100012	Customer Price Group NARTESIAE		Active	<input type="checkbox"/>	Price	EUR	Customer Price Group NARTESIAE		
100013	Customer Price Group NARTESIAE		Active	<input type="checkbox"/>	Price & Discount	USD	Customer Price Group NARTESIAE		
100014	Customer Dis. Group LARIS ACC		Active	<input type="checkbox"/>	Discount		Customer Dis. Group LARIS ACC		
100015	Customer Dis. Group RETEL		Active	<input type="checkbox"/>	Discount		Customer Dis. Group RETEL		
100016	Default Price List		Active	<input type="checkbox"/>	Price	EUR	All Customers		
100017	Sales Price for FORDON		Draft	<input type="checkbox"/>	Price & Discount	USD	Customer Price Group FORDON		
100018	Customer Price Group US Retail		Active	<input type="checkbox"/>	Price & Discount	USD	Customer Price Group US Retail		
100019	Customer Price Group US - Various Prices		Active	<input type="checkbox"/>	Price & Discount	USD	Customer Price Group US	01/10/2025	12/31/2025

**Dynamics 365 Business Central**

s00019

[Workflows](#) | 
 [Copy Lines](#) | 
 [Suggest Lines](#) | 
 More options

### General

Cards	S00019	Status	Active
Description	Customer Price Group US - provides PMS	Carding Code	USD
Assigner Type	Customer Price Group	Starting Date	31/12/2025
Assigner No.	44 Customer	Ending Date	12/01/2025
Name	Customer Price Group		
View Columns Bar	Customer Price Group Company		

[Filters](#) | 
 [New Line](#) | 
 [Delete Line](#) | 
 [Expand](#) | 
 [Expand All](#) | 
 [Collapse All](#)

Product Type	Item No.	Description	Variant Code	Work Type Code	Unit of Measure	Quantity	Default	Price	Line Amount %	Net Price	Tax
Matrix	10005	Tablet pc10			PCL	8	Price	\$ 6.45	0.00		
Matrix	10045	Trackball tablet unit			PCL	8	Price	\$9.00	0.00		
Matrix	10014	Mouse			PCL	8	Price	\$9.00	0.00		

Open Finance Central

## 500019

[New Line Item...](#)
[Copy Lines...](#)
[Suggest Lines...](#)
[More options](#)

### General

**500019** ▼ Status: **Active** ▼  
 Description: **Customer Price Group UK - provides PMSB** ▼ Currency Code: **USD** ▼  
 Assign-to Type: **Customer Price Group** ▼ Starting Date: **16/10/2025** ▼  
 Price: **US** ▼ Ending Date: **10/01/2025** ▼  
 View Columns Bar: **Price & Discount** ▼ Price & Discount

[Lines](#)
[New Line](#)
[Delete Line](#)
[Expand](#)
[Expand All](#)
[Collapse All](#)

Product Type	Product Key	Description	Variant Code	Work Item Code	Unit of Measure	Quantity	Minimum Quantity	Default	Price	Unit Price	Line Discount %	Net Price
Matrix	10000	1000000000			PCS	0	0	Price		0.00	0.00	
Matrix	10004	Trackback jacket uni			PCS	0	0	Price		20.00	0.00	
Matrix	10014	jeans			PCS	0	0	Price		30.00	0.00	

**Dynamics 365 Business Central**

### Sales Price List

100019

▼ Weekly Lines... ▼ Copy Lines... ▼ Suggest Lines... More options

**General**

Code	100019	Status	Active
Description	Customer Price Group US - products FRCS	Currency Code	
Assignment Type	Customer Price Group	Starting Date	
View	All	Ending Date	
Show Column Bar	Price & Discount		

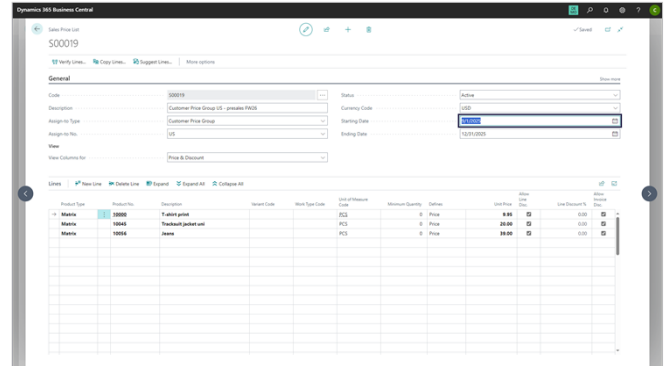
Lines | New Line | Delete Line | Expand | Expand All | Collapse All

Product Type	Product No.	Description	Unit Code	Work Unit Code	Unit of Measure	Minimum Quantity	Default	Unit Price	Unit	Low Discount %	Percent
Metric	10000	T-shirt design	PCS		PCS	0	Price	\$ 9.95	01	0.00	0%
Metric	10001	Pocketbook journal unit	PCS		PCS	0	Price	\$ 10.00	01	0.00	0%
Metric	10004	Jewelry	PCS		PCS	0	Price	\$ 4.00	02	0.00	0%

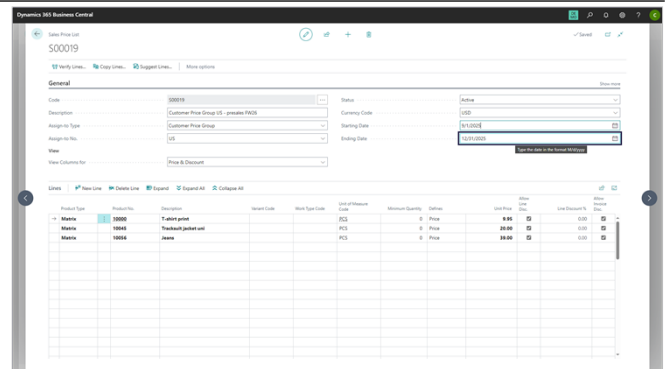
Right-click menu:  
 Add  
 Edit  
 Delete  
 Refresh  
 Refresh Fields  
 South African Rand  
 Select Price List Unit

## K3 Pebblestone

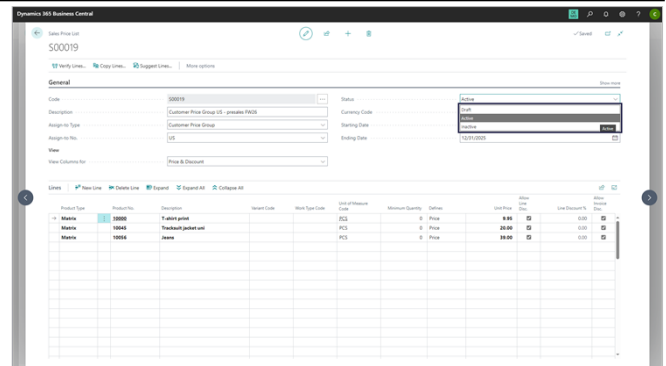
The Starting Date specifies the date from which the price is valid.



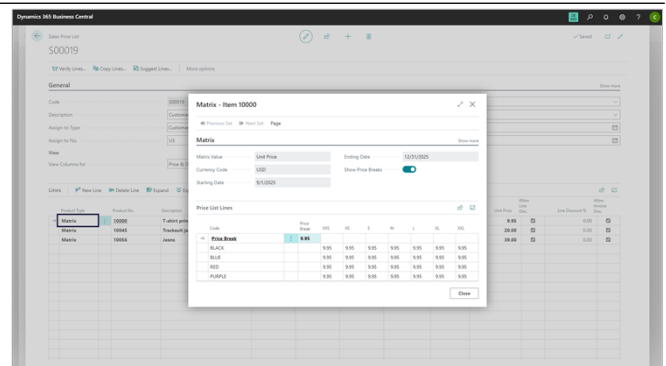
The Ending Date specifies the last date the price is valid.



The Status field specifies whether the price list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and can be edited (when Allow Editing Active Price is enabled) and used for price calculations.

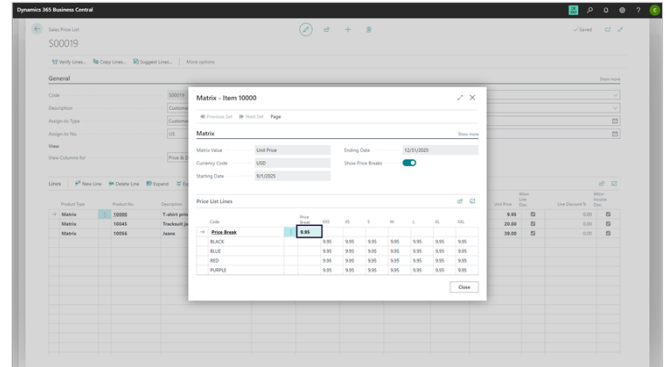


When in the sales price list line the Product Type is Item, it is possible to enter a Unit Price for an item. When in the sales price list line the Product Type is Matrix, it is possible to enter the price per variant in a matrix format.

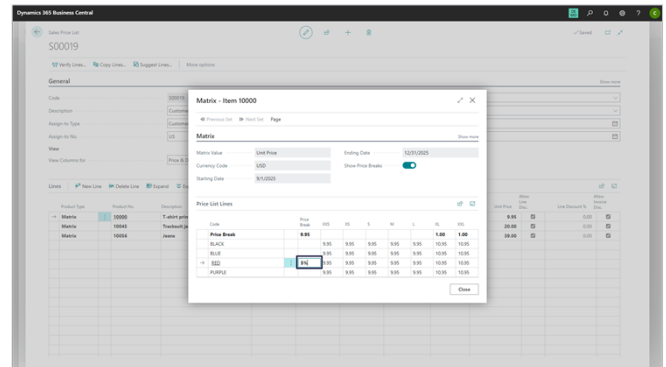


## K3 Pebblestone

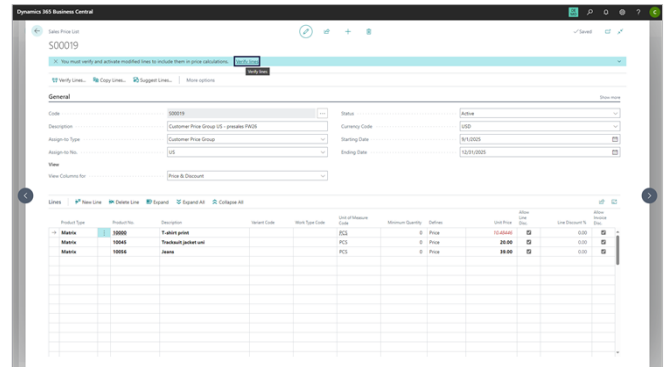
By using the general field at the top left of the Price Break row and column, all variants can be filled at once with the entered amount.



In the Price Break row or column, an additional amount or percentage can be entered, which will be applied to all variants in the respective row or column.

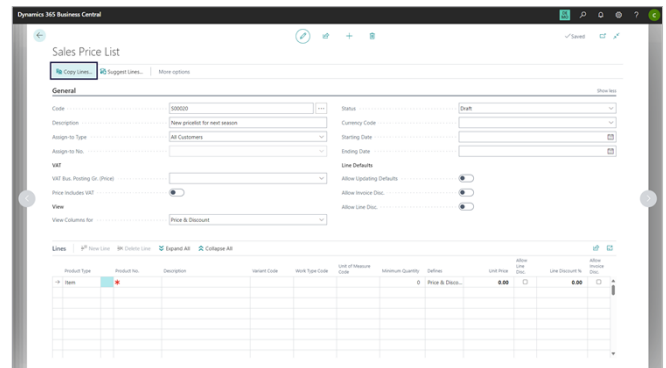


The Verify Lines function checks data consistency in the new and modified price list lines, finds the duplicate price lines and suggests the resolution of the line conflicts.

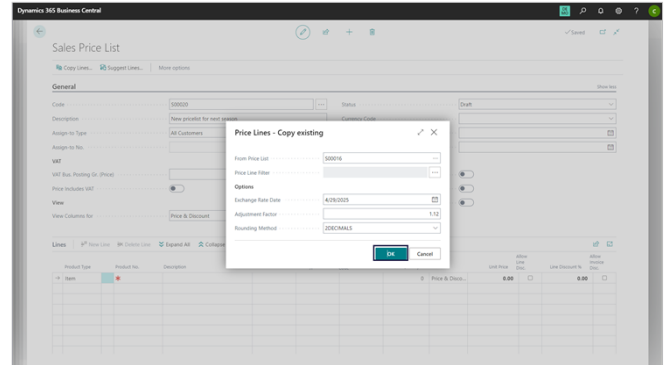


### 2.6.1.2. Creating sales price lists

By creating a new sales price list and then using the Copy Lines function, items with prices from another list can be copied into the new list.



When retrieving existing prices, an adjustment factor can be entered, which will be multiplied with the retrieved prices and rounded according to the specified rounding method. For prices in a different currency, the desired exchange rate date can also be specified.



### 2.6.1.3. Best price principle

The sales price engine uses the best price principle. When multiple price lines are found, a price line with a variant code and/or a currency specified, will have priority over a price line without. When these priorities have been applied and there are still multiple price lines the price line with the lowest price will be picked.

Thank you for watching!



### 2.6.2. Recommended Retail Prices BC25

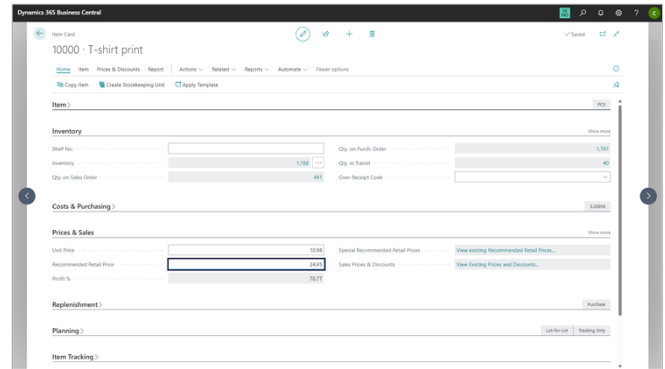
In Business Central, the Recommended Retail Price (RRP) represents the sales price plus a margin for the retailer. It can be recorded at the item variant level within the matrices. This RRP can then be used in the layouts of documents, such as sales quotes or order confirmations, to clearly communicate suggested retail pricing to customers.



#### 2.6.2.1. Default recommended retail price and special recommended

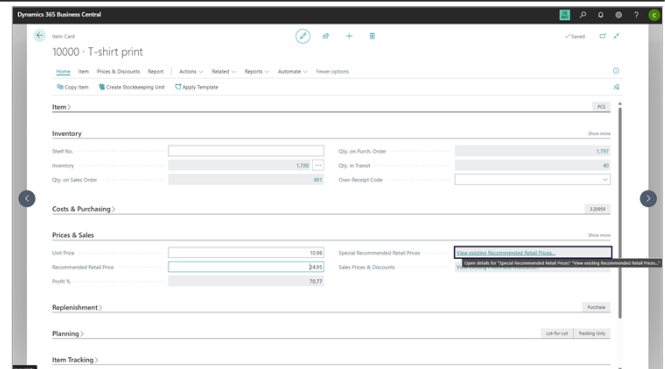
## retail price lists

The default recommended retail price (RRP) of an item can be entered in the Recommended Retail Price field on the item card.



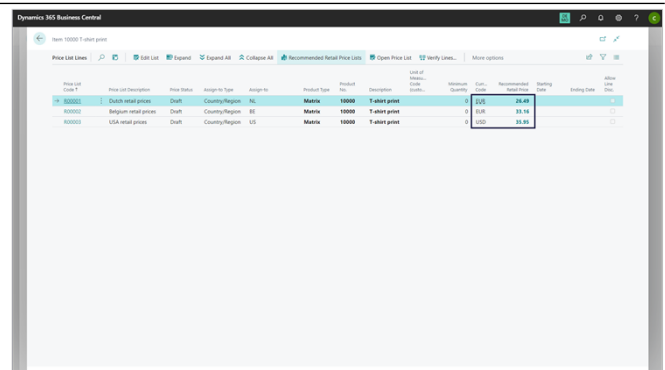
Dynamics 365 Business Central Item Card for '10000 - T-shirt print'. The 'Prices & Sales' section shows the 'Recommended Retail Price' field set to 24.95. Other fields include 'Unit Price' (10.00), 'Special Recommended Retail Price' (link), 'Sales Prices & Discounts' (link), 'Profit %' (70.77), and 'Over Receipt Code'.

It is possible to create special recommended retail price lists where a specific price, different from the default, can be set for an item.



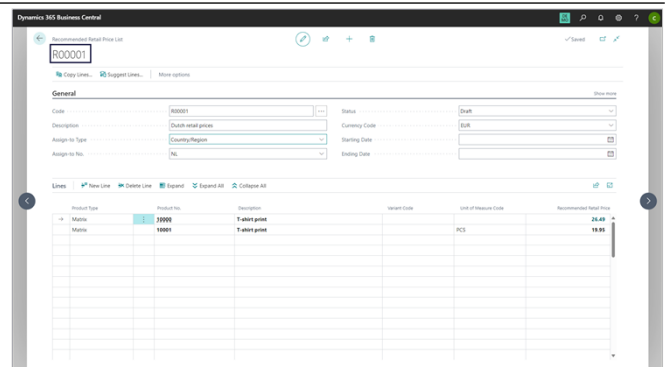
Dynamics 365 Business Central Item Card for '10000 - T-shirt print'. The 'Special Recommended Retail Price' field is highlighted, showing a value of 24.95. A tooltip indicates: 'Special Recommended Retail Price: Special Recommended Retail Price. This price is used for special recommended retail price lists. It is not used for standard recommended retail price lists.' Other fields include 'Unit Price' (10.00), 'Recommended Retail Price' (24.95), 'Sales Prices & Discounts' (link), 'Profit %' (70.77), and 'Over Receipt Code'.

It is possible to add the same item to multiple recommended retail price lists, such as a price list for specific countries, customer price group or all customers. The item price can be defined for each price list in a different currency, for a specific period, unit of measure, or minimum quantity.



Price List Code	Price List Description	Price Status	Assign To Type	Assign To	Product Type	Product No.	Description	Unit of Measure	Quantity	Unit Price	Recommended Retail Price	Starting Date	Ending Date
RL0001	Dutch retail prices	Draft	Country/Region	NL	Matrix	10000	T-shirt print	EA	1	24.95	24.95		
RL0002	Belgium retail prices	Draft	Country/Region	BE	Matrix	10000	T-shirt print	EA	1	24.95	24.95		
RL0003	USA retail prices	Draft	Country/Region	US	Matrix	10000	T-shirt print	EA	1	24.95	24.95		

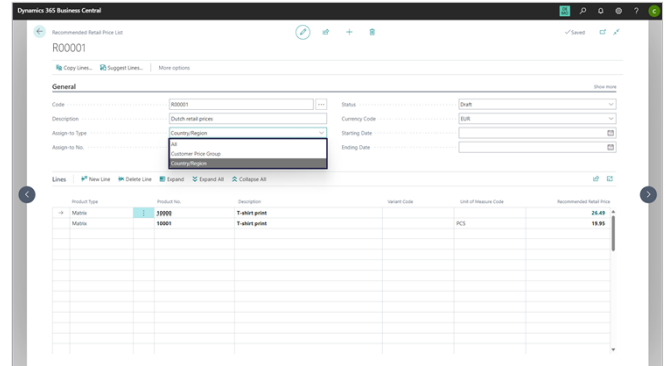
By opening a price list, you can adjust the recommended retail price of an item on that specific list. To do this, the price list must be in Draft status, and after making the adjustment, it should be set to Active.



Dynamics 365 Business Central Recommended Retail Price List form for 'RL0001'. The 'General' section shows the price list is in 'Draft' status. Other fields include 'Code' (RL0001), 'Description' (Dutch retail prices), 'Assign To Type' (Country/Region), 'Assign To' (NL), 'Status' (Draft), 'Currency Code' (EUR), 'Starting Date' (blank), and 'Ending Date' (blank).

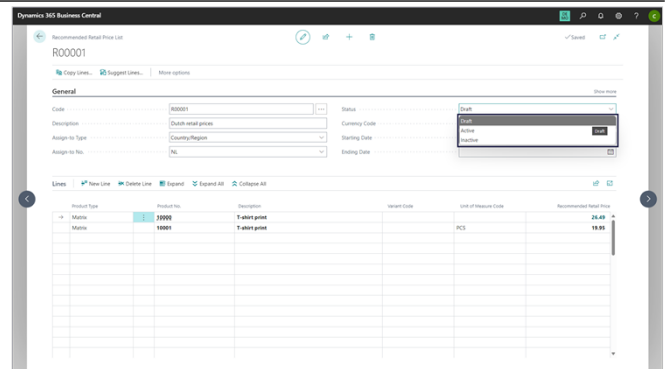
Product Type	Product No.	Description	Variant Code	Unit of Measure Code	Recommended Retail Price
Matrix	10000	T-shirt print		EA	24.95
Matrix	10001	T-shirt print		EA	24.95

The Assign-to Type field specifies the type of entity to which the recommended retail price list is assigned. The options are relevant to the entity you are currently viewing.



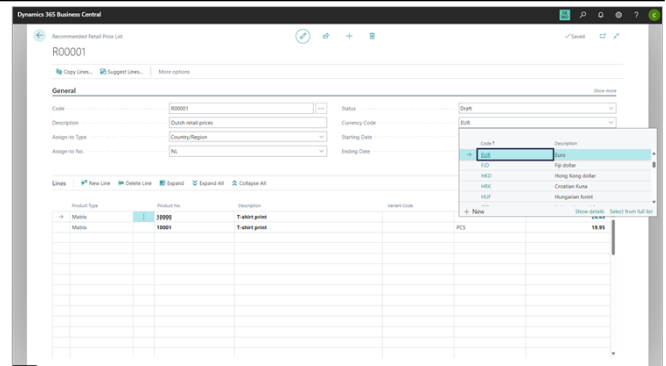
The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. The 'Assign-to Type' field is highlighted, and a dropdown menu is open, showing options: 'Customer Price Group' and 'Country/Region'.

The Status field specifies whether the price list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and can be edited (when Allow Editing Active Price is enabled) and used for price calculations.



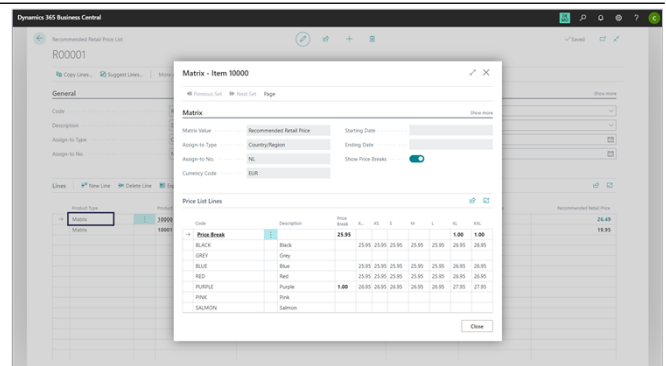
The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. The 'Status' field is highlighted, and a dropdown menu is open, showing options: 'Draft', 'Inactive', and 'Active'.

The Currency Code field specifies the currency code of the price list.



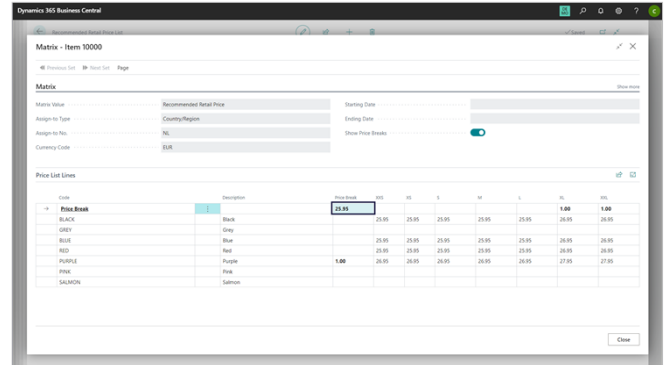
The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. The 'Currency Code' field is highlighted, and a dropdown menu is open, showing options: 'USD', 'EUR', 'GBP', 'JPY', 'AUD', 'CAD', 'CHF', 'CNY', 'HKD', 'INR', 'KRW', 'MXN', 'NZD', 'SGD', 'THB', 'TRY', 'ZAR', 'BRL', 'RUB', 'UAH', 'VND', 'IDR', 'MYR', 'PHP', 'TWD', 'NZD', 'USD', 'EUR', 'GBP', 'JPY', 'AUD', 'CAD', 'CHF', 'CNY', 'HKD', 'INR', 'KRW', 'MXN', 'NZD', 'SGD', 'THB', 'TRY', 'ZAR', 'BRL', 'RUB', 'UAH', 'VND', 'IDR', 'MYR', 'PHP', 'TWD'.

When in the sales price list line the Product Type is Item, it is possible to enter a Unit Price for an item. When in the sales price list line the Product Type is Matrix, it is possible to enter the price per variant in a matrix format.



The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. A dialog box titled 'Matrix - Item 10000' is open, showing a table with columns: 'Code', 'Description', 'Price Break', 'K', 'M', 'S', 'L', 'XL', 'XXL'. The table contains data for various items and their prices.

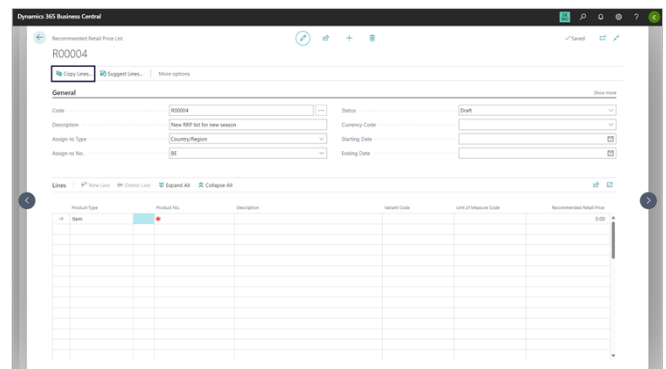
By using the general field at the top left of the Price Break row and column, all variants can be filled at once with the entered amount. In the Price Break row or column, an additional amount or percentage can be entered, which will be applied to all variants in the respective row or column.



The screenshot shows the 'Price Breaks' window for item 10000. It includes a 'Matrix' section with fields for Matrix Value, Recommended Retail Price, Starting Date, Ending Date, Assign to Type, Country/Region, Assign to No., and Currency Code. Below this is a 'Price List Lines' table with columns for Code, Description, Price Break, and various currency codes (USD, EUR, GBP, etc.). The 'Price Break' column is highlighted, showing a value of 25.95 for the 'Black' variant.

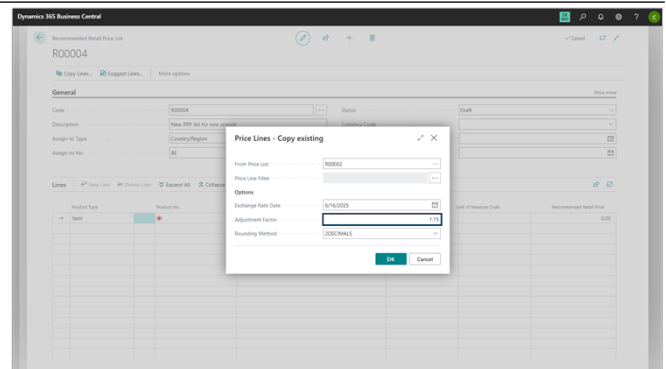
### 2.6.2.2. Creating sales price lists

By creating a new recommended retail price list and then using the Copy Lines function, items with prices from another list can be copied into the new list.



The screenshot shows the 'Recommended Retail Price List' window for list R00004. It includes a 'General' section with fields for Code, Description, Assign to Type, Assign to No., Status, Currency Code, Starting Date, and Ending Date. Below this is a 'Lines' table with columns for Product Type, Product No., Description, Variant Code, Unit of Measure Code, and Recommended Retail Price.

When retrieving existing recommended retail prices, an adjustment factor can be entered, which will be multiplied with the retrieved prices and rounded according to the specified rounding method. For prices in a different currency, the desired exchange rate date can also be specified.



The screenshot shows the 'Price Lines - Copy existing' dialog box. It includes fields for Price List, Price Line Filter, Exchange Rate Date, Adjustment Factor, and Rounding Method. The 'Adjustment Factor' field is highlighted, showing a value of 1.0.

### 2.6.2.3. Best price principle

The price engine uses the best price principle. When multiple recommended retail price lines are found, a price line with a variant code and/or a currency specified, will have priority over a price line without. When these priorities have been applied and there are still multiple price lines the price line with the lowest price will be picked.

Thank you for watching!



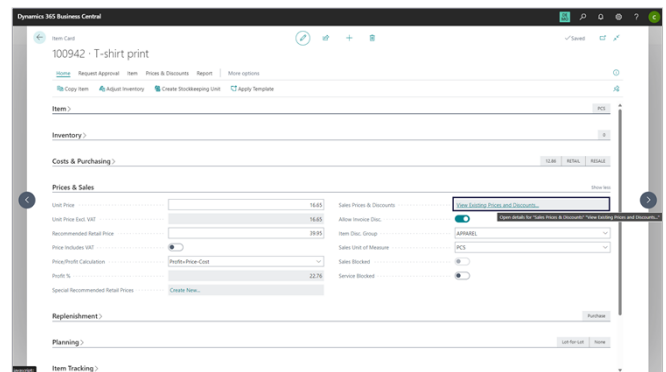
## 2.6.3. Sales discounts BC25

Special sales prices and discounts provide flexibility and efficiency in managing pricing strategies. They enable the definition of customer-specific prices, volume-based discounts, and time-limited promotions. Prices and discounts can be set based on criteria such as customer groups, item categories, currencies, and date ranges. This ensures accurate pricing, supports diverse sales models, and reduces manual adjustments.

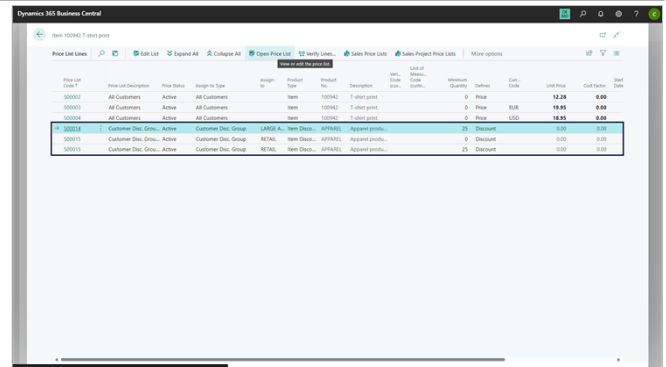


### 2.6.3.1. Special sales discount lists

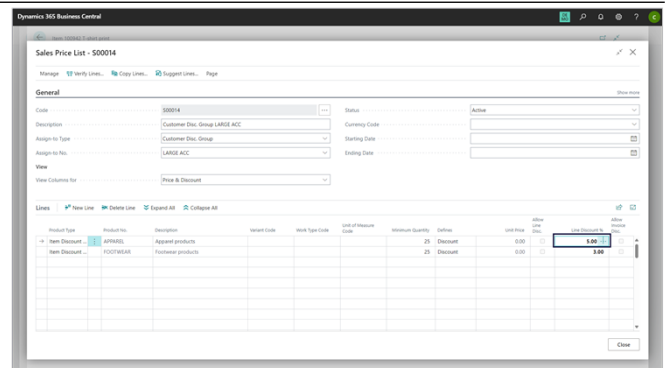
It is possible to create special sales price/discount lists where a specific discount can be set for an item.



It is possible to add the same item to multiple price/discount lists, such as a discount list for all customers, a specific customer discount group like a country, a particular customer, or a specific campaign. The item discount can be defined for each discount list in a different currency, for a specific period, unit of measure, or minimum quantity.

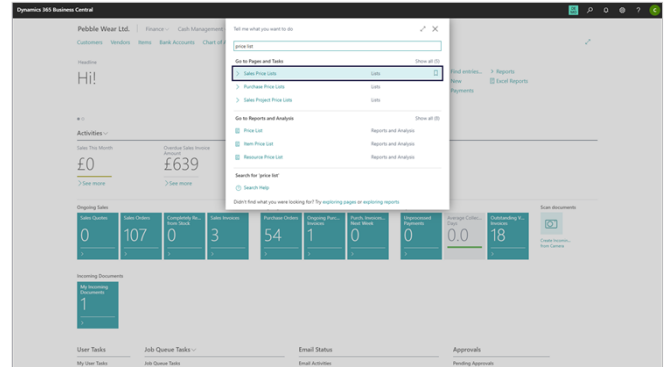


By opening a price/discount list, you can adjust the discount percentage of an item on that specific list. To do this, the price list must be in Draft status, and after making the adjustment, it should be set to Active.

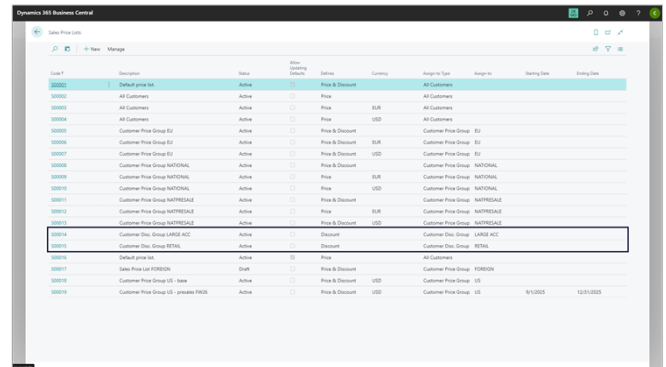


## K3 Pebblestone

The Sales Price/Discount Lists can also be started by searching for it.

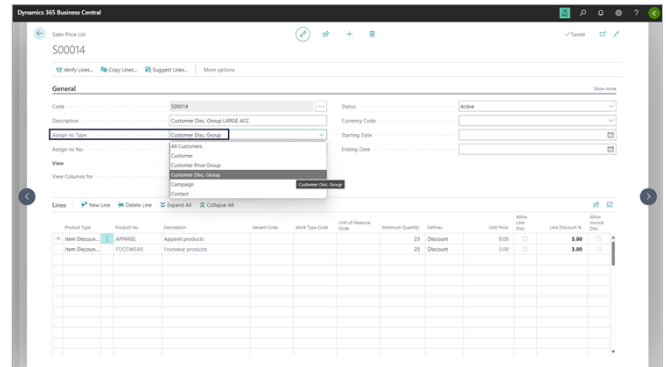


As mentioned earlier, sales discount lists can be created for different groups, with varying items and prices. This can be done per country, customer price group, customer agreement, for a specific period, for a certain unit of measure, currency, or starting from a minimum quantity.

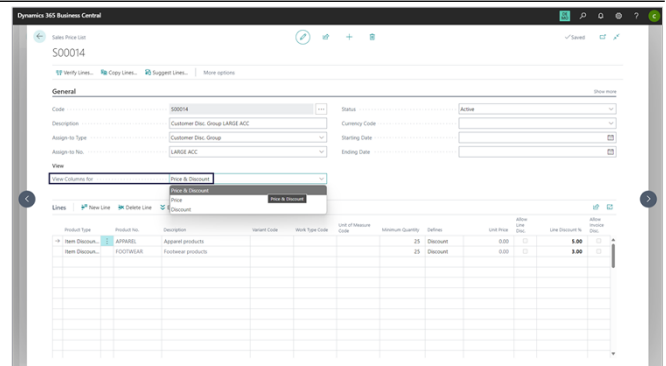


Item No.	Description	Item	Status	Price	Currency	Assign To Type	Assign To	Starting Date	Ending Date
500001	Default price list	Price	Active	Price & Discount	USD	All Customers			
500002	All Customers	Price	Active	Price	EUR	All Customers			
500003	All Customers	Price	Active	Price	USD	All Customers			
500004	Customer Price Group EU	Price & Discount	Active	Price & Discount	EUR	Customer Price Group - EU			
500005	Customer Price Group EU	Price & Discount	Active	Price & Discount	USD	Customer Price Group - EU			
500006	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	EUR	Customer Price Group - NATIONAL			
500007	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	USD	Customer Price Group - NATIONAL			
500008	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	EUR	Customer Price Group - NATIONAL			
500009	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	USD	Customer Price Group - NATIONAL			
500010	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	EUR	Customer Price Group - NATIONAL			
500011	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	USD	Customer Price Group - NATIONAL			
500012	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	EUR	Customer Price Group - NATIONAL			
500013	Customer Price Group NATIONAL	Price & Discount	Active	Price & Discount	USD	Customer Price Group - NATIONAL			
500014	Customer Price Group LARGE ACC	Price & Discount	Active	Price & Discount	EUR	Customer Price Group - LARGE ACC			
500015	Customer Price Group LARGE ACC	Price & Discount	Active	Price & Discount	USD	Customer Price Group - LARGE ACC			
500016	Default price list	Price	Active	Price	EUR	All Customers			
500017	Sales Price List FOREIGN	Price & Discount	Active	Price & Discount	EUR	Customer Price Group - FOREIGN			
500018	Customer Price Group US - Large	Price & Discount	Active	Price & Discount	USD	Customer Price Group - US			
500019	Customer Price Group US - Standard Price	Price & Discount	Active	Price & Discount	USD	Customer Price Group - US			

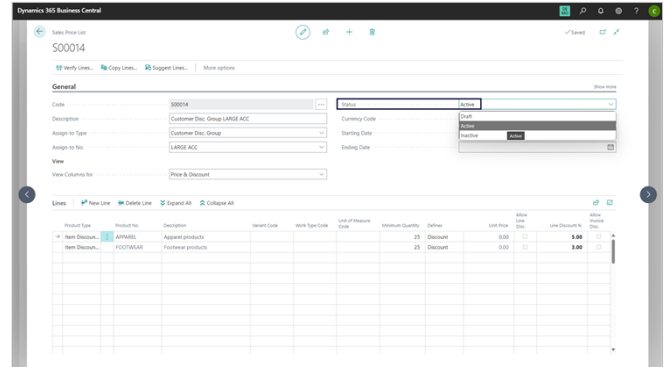
The Assign-to Type field specifies the type of entity to which the discount list is assigned. The options are relevant to the entity you are currently viewing.



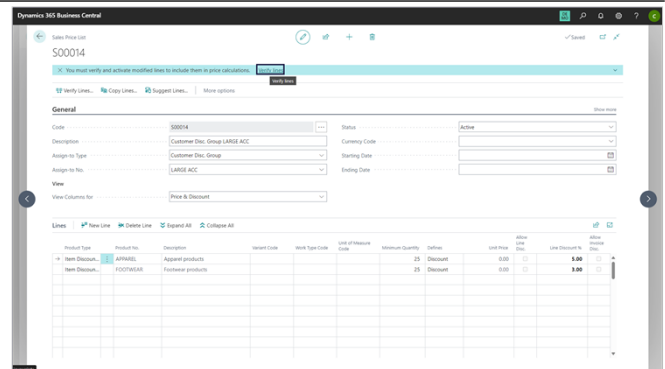
The View Columns for field specifies the amount type filter that defines the columns shown in the price list lines.



The Status field specifies whether the price/discount list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and can be edited (when Allow Editing Active Price is enabled) and used for price calculations.

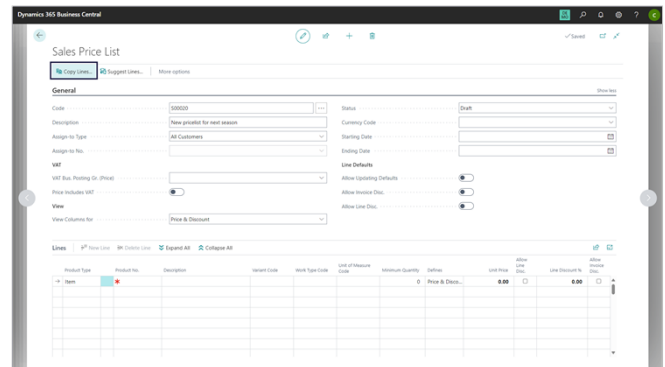


The Verify Lines function checks data consistency in the new and modified discount list lines, finds the duplicate discount lines and suggests the resolution of the line conflicts.

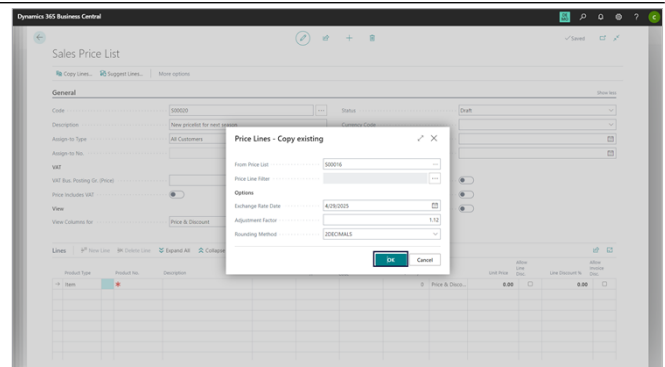


### 2.6.3.2. Creating sales price lists

By creating a new sales price list and then using the Copy Lines function, items with discounts from another list can be copied into the new list.



When retrieving existing discounts percentages, an adjustment factor can be entered, which will be multiplied with the retrieved discount percentages and rounded according to the specified rounding method.



### 2.6.3.3. Best price principle

The sales price/discount engine uses the best price principle.

When multiple discount lines are found, the discount line with the highest discount will be picked.

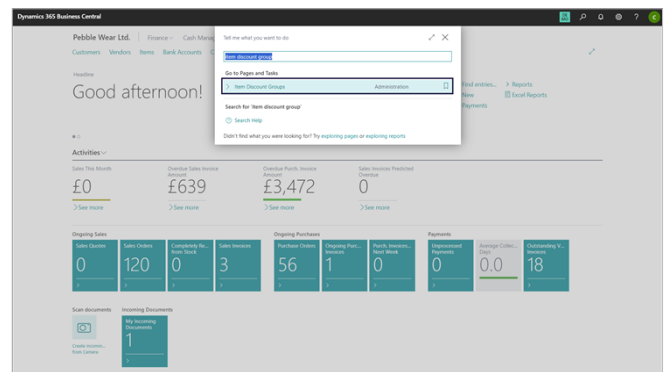
Thank you for watching!



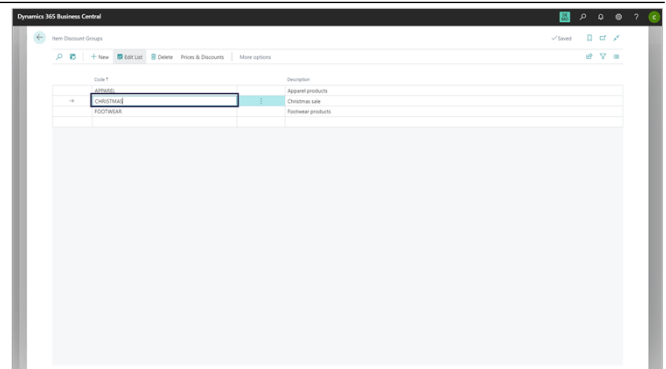
## 2.6.4. Item Discount Groups BC25

Item Discount Groups in Business Central provide a structured method for managing various discount scenarios on item level. Time-limited discounts can be set up, with defined start and end dates. This functionality enables the assignment of tailored discount lists to specific item discount groups, ensuring accurate and efficient discount management across different markets and conditions.

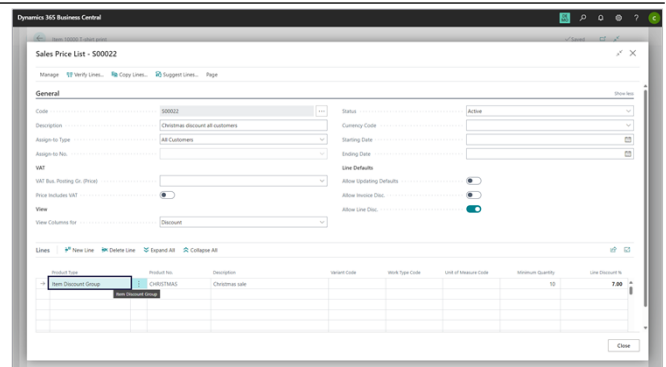
Item Discount Groups can be found by using the search function.



Multiple item discount groups can be created.

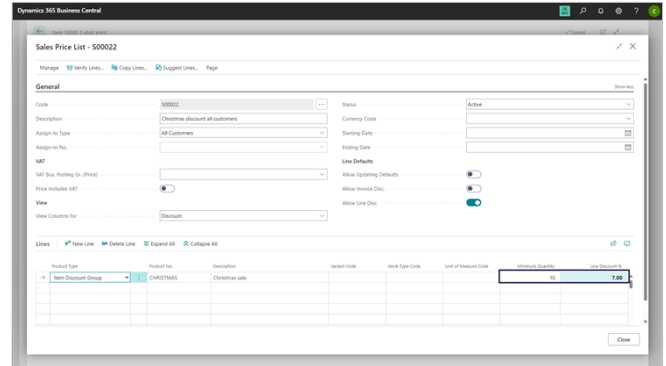


By creating a sales price list with the product type Item Discount Group, it can be linked to an Item Discount Group.

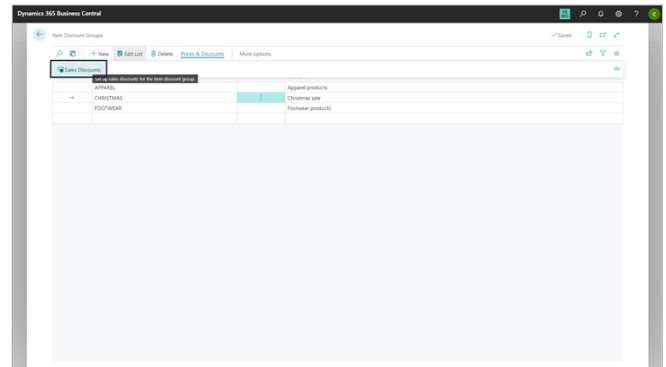


## K3 Pebblestone

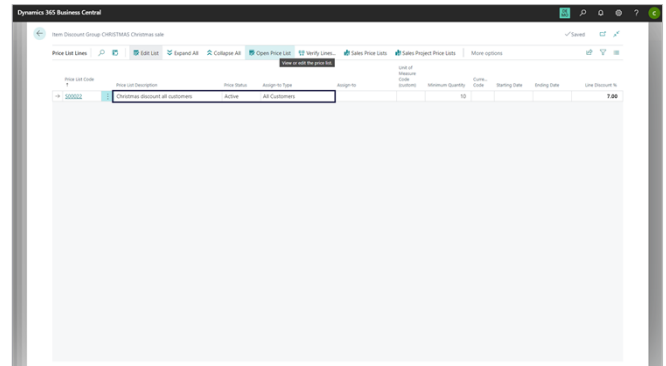
In the sales price line with product type Item Discount Group, select a group, a minimum quantity, and a line discount percentage.



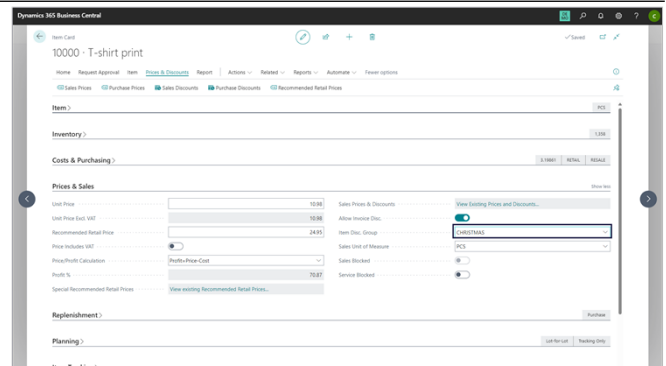
Check whether the created sales price list with the Item Discount Group is linked to the corresponding Item Discount Group.



All sales price lists with Product Type 'Item Discount Group' are displayed.



Link the item to the Item Discount Group.



When entering the sales order, customers receive the specified discount for this item if the quantity exceeds the minimum.

## 2.6.5. Special Purchase Prices and Discounts

### 2.6.5.1. Navigate to Special Purchase Prices & discounts

1. **Special Purch. Prices & Discounts**  
**Create New...**

### 2.6.5.2. Create Special Purchase price

Click on the field **Special Purch. Prices & Discounts**

1. Click on the item **Create New Special Price...**
2. Click on the button **OK**.

1. **Vendor No. Filter.**  
Specifies a filter for which purchase prices display.
2. **Item No. Filter.**  
Specifies a filter for which purchase prices to display.
3. **Starting Date Filter.**  
Specifies a filter for which purchase prices to display.

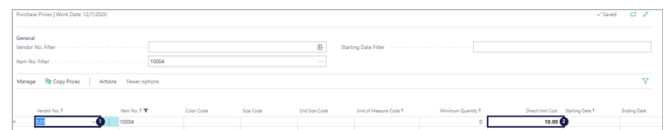
1. **Vendor No.**  
Specifies the number of the vendor who offers the line discount on the item.

## K3 Pebblestone

2. **Item No.**  
Specifies the number of the item that the purchase price applies to.
3. **Color Code.**  
Specifies the color code of the item on the line.
4. **Size Code.**  
Specifies the size code of the item on the line.
5. **2nd Size Code.**  
Specifies the second size code of the item on the line.
6. **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.
7. **Minimum Quantity.**  
Specifies the minimum quantity of the item that you must buy from the vendor in order to get the purchase price.
8. **Direct Unit Cost.**  
Specifies the cost of one unit of the selected item or resource.
9. **Starting Date.**  
Specifies the date from which the purchase price is valid.
10. **Ending Date.**  
Specifies the date to which the purchase price is valid.

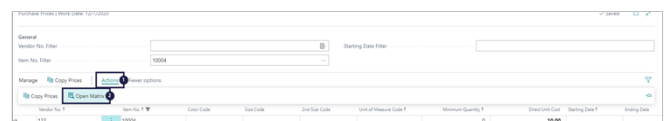
### 2.6.5.3. Add a Special purchase price

1. Choose **Vendor No.**
2. Add **Direct Unit Cost.**



### 2.6.5.4. Different purchase prices on variant level.

1. Click on the navigation menu item popup **Actions**.
2. **View values for sales price lines on color-size combination level for the item.**



1. Change the price on variant level.
2. Click on the button **Close**.

Code	S	M	L
→ PINK	10.00	10.00	10.50
SALMON	10.00	10.00	10.50
AQUA	10.00	10.00	10.50
MIDNIGHT	10.00	10.00	10.50
OFF-WHITE	10.00	10.00	10.50

### 2.6.5.5. Create Special discount price

Click on the field **Special Purch. Prices & Discounts**

1. Click on the item **Create New Special Discount...**
2. Click on the button **OK**.

1. **Vendor No. Filter.**  
Specifies a filter for which purchase line discounts display.
2. **Item No. Filter.**  
Specifies a filter for which purchase line discounts to display.
3. **Starting Date Filter.**  
Specifies a filter for which purchase line discounts to display.

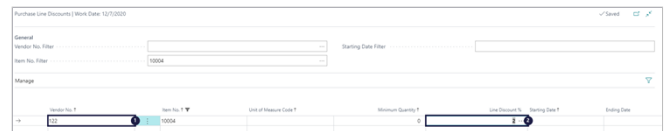
1. **Vendor No.**  
Specifies the number of the vendor who offers the line discount on the item.
2. **Item No.**  
Specifies the number of the item that the purchase line discount applies to.
3. **Unit of Measure Code.**  
Specifies how each unit of the item or resource is measured, such as in pieces or hours. By default, the value in the Base Unit of Measure field on the item or resource card is inserted.
4. **Minimum Quantity.**



- Specifies the minimum quantity of the item that you must buy from the vendor in order to receive the purchase line discount.
5. **Line Discount %.**  
Specifies the discount percentage that is granted for the item on the line.
  6. **Starting Date.**  
Specifies the date from which the purchase line discount is valid.
  7. **Ending Date.**  
Specifies the date to which the purchase line discount is valid.

## 2.6.5.6. Add a Special discount price

1. Choose **Vendor No.**
2. Add **Line Discount %**.



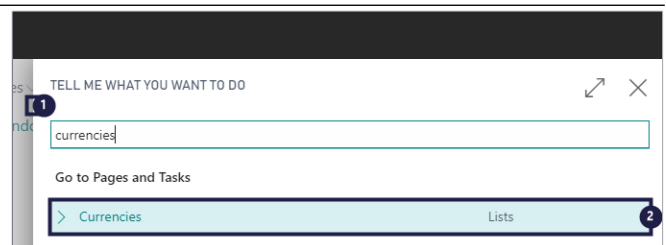
## 2.6.6. Pricing in different currencies

### 2.6.6.1. Navigate to Currencies

1. Click on the link **TELL ME WHAT YOU WANT TO DO**.

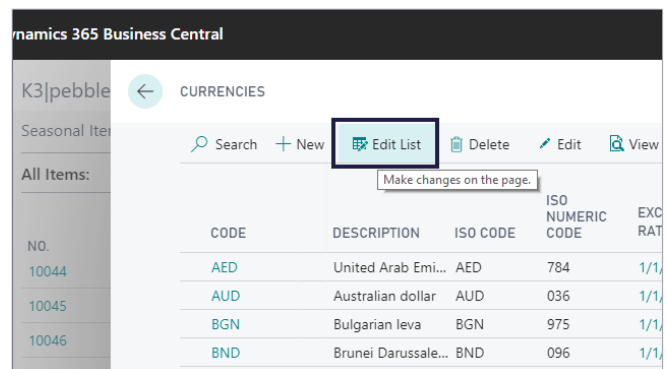


1. Enter the text **currencies**.
2. Click on **Currencies Lists**.



### 2.6.6.1.1. Choose the sales price currency

Click on the navigation menu item **Edit List**



NO.	CODE	DESCRIPTION	ISO CODE	ISO NUMERIC CODE	EXC RAT
10044	AED	United Arab Emi...	AED	784	1/1
10045	AUD	Australian dollar	AUD	036	1/1
10046	BGN	Bulgarian leva	BGN	975	1/1
10047	BND	Brunei Darussale...	BND	096	1/1

### Sales Price Currency

Check mark the boxes which sales prices must be available.

EXCHANGE RATE DATE	EXCHANGE RATE	EMU CURRENCY	SALES PRICE CURRENCY	PRICE ROUNDING METHOD	REALIZED GAINS ACC.	UNREALIZED GAINS ACC.
1/1/2017	0.233753	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.342995	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.316096	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.392997	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.245198	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.431903	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.543424	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.026618	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.1168	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.011217	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340
1/1/2017	0.6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340
1/1/2017	0.301402	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340

### Sales Price Rounding Method

EXCHANGE RATE	EMU CURRENCY	PRICE CURRENCY	ROUNDING METHOD	REALIZED GAINS ACC.	LOSSES ACC.	UNREALIZED GAINS ACC.
3753	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
2995	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
6096	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
2997	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
5198	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
1903	<input type="checkbox"/>	<input checked="" type="checkbox"/>		9330	9340	
3424	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
6618	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
1168	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
1217	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340	
1402	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	

Specifies how the sales prices for this currencies are rounded. The system will automatically convert local prices to sales prices in this currency and then round it according to the Rounding Method setup. Choose the Sales Price Rounding Method you prefer.

392997	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
245198	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
431903	<input type="checkbox"/>	<input checked="" type="checkbox"/>		9330	9340	
543424	<input type="checkbox"/>	<input type="checkbox"/>				
026618	<input type="checkbox"/>	<input type="checkbox"/>				
0.1168	<input type="checkbox"/>	<input type="checkbox"/>				
011217	<input type="checkbox"/>	<input type="checkbox"/>				
0.6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				
301402	<input type="checkbox"/>	<input type="checkbox"/>				
087635	<input type="checkbox"/>	<input type="checkbox"/>				
118165	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
003674	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
000097	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
014401	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	

### NEARWHOLE

EXCHANGE RATE	EMU CURRENCY	SALES PRICE CURRENCY	PRICE ROUNDING METHOD	REALIZED GAINS ACC.	LOSSES ACC.	UNREALIZED GAINS ACC.
0.233753	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.342995	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.316096	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.392997	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.245198	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.431903	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340	
0.543424	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.026618	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.1168	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.011217	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	
0.6458	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NEARWHOLE	9330	9340	
0.301402	<input type="checkbox"/>	<input type="checkbox"/>		9330	9340	

### 2.6.6.1.2.

View the sales price currency on the item

Click on the field Special Sales Prices & Discounts on the item card

Country/Region of Origin Code ... US

Show less

37.20 Profit % ..... 67.04

37.20 Special Sales Prices & Discounts ... [View Existing Prices and Discounts...](#)

89.95 Special Recommended Retail Pr... [Create New...](#) [Open det...](#)

Allow Invoice Disc. .... ☒

Item Disc. Group ..... APPAREL

1. **Unit Price (CAD).**  
This is the currency which just have been setting up it specifies the price of the item in the foreign currency.

LINE TYPE	SALES TYPE	SALES CODE	TYPE	UNIT OF MEASURE CODE	MINIMUM QUANTITY	LINE DISCOUNT %	UNIT PRICE	UNIT PRICE (CAD)	UNIT PRICE (USD)
Sales Line Discount	Customer Price/Disc. Group	LARGE ACC	Item Disc. Group		25.00	5.00	0.00	0.00	0.00
Sales Line Discount	Customer Price/Disc. Group	RETAIL	Item Disc. Group		0.00	2.00	0.00	0.00	0.00
Sales Line Discount	Customer Price/Disc. Group	RETAIL	Item Disc. Group		25.00	3.00	0.00	0.00	0.00
Sales Price	Customer Price/Disc. Group	EU	Item		0.00	0.00	28.40	65.95	43.95
Sales Price	Customer Price/Disc. Group	NATIONAL	Item		0.00	0.00	27.50	63.95	42.95
Sales Price	Customer Price/Disc. Group	NATPRESALE	Item		0.00	0.00	27.00	62.95	41.95
Sales Price	Customer Price/Disc. Group	NATPRESALE	Item		0.00	0.00	27.40	63.95	42.95

## 3. Sales

### 3.1. Sales prices and discounts BC25

#### 3.1.1. Customer Price Groups BC25

Customer Price Groups in Business Central offer a structured way to manage various pricing scenarios. They enable the creation of specific price lists for domestic and foreign customers, including price lists in different currencies. Additionally, they support time-bound price lists for presales items, allowing prices to be applied within a defined start and end date. This functionality also allows for assigning tailored price lists to specific customer groups, ensuring accurate and efficient price management across diverse markets and conditions.

Customer Price Groups can be found by using the search function.

Want to learn more about Business Central?

Activities

£0

£639

0 107 0 3 54 1 0 0 0.0 18

1

User Tasks Job Queue Tasks Email Status Approvals

My User Tasks Job Queue Tasks Email Activities Pending Approvals

It is possible to create price groups for different customer segments. Like NATIONAL, EU, FOREIGN or US.

Code	Description	Price Calculation Method	Allow Line Disc.	Allow Item Disc.	Price Includes VAT	10% Vat. Rating (0-100)
EU	Foreign & other countries		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	EU
FOREIGN	Foreign & other countries		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	FOREIGN
NATIONAL	National		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NATIONAL
NATPRESALE	National Presales		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	NATPRESALE
US	United States		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	US
US1	Including VAT		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	US1

Customer Price Group

[New](#)
[Edit List](#)
[Delete](#)
[Customer Price Group](#)
[More options](#)

Code	Description	Price Calculation Method	Allow Low Price	Allow Invoiced Price	Price Invoiced VAT	Price Invoiced VAT
EU	EU		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<a href="#">Edit</a>
FOREIGN	Foreign / other countries		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
NATIONAL	National		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
NATPREL	National Prepaid		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
UAT	United States		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
UAT	Including UAT		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

[New Customer Price Group](#)

Code	Description
EU	Domestic customers and vendors
FOREIGN	Customers and vendors in EU
UAT	Other customers and vendors from EU

[Show details](#)
[Select from full list](#)

The screenshot displays the 'Customer Price Group' page in Dynamics 365 Business Central. The page has a top navigation bar with the title 'Customer Price Group' and a search bar. Below the navigation bar, there are tabs for 'Sales Price List', 'Sales Price', and 'More options'. The main content area shows a table with columns for 'Name', 'Description', and various status flags. The 'Name' column is highlighted with a red box, and the 'Description' column is highlighted with a blue box. The 'Name' column contains the text 'NAFIRELAC' and the 'Description' column contains the text 'Foreign / other countries'.

Name	Description	Is Active	Is Archived	Is Deleted	Is Locked	Is Read-Only	Is System	Is User-Defined
NAFIRELAC	Foreign / other countries							
NAFIRELAC	Regional							
NAFIRELAC	National Products							
NAFIRELAC	United States							
NAFIRELAC	Including VAT							

Customer Price Groups

[Customer Price Group](#)
[New](#)
[Edit](#)
[Delete](#)
[Customer Price Group](#)
[More options](#)

[Add Price Item](#)
[100 Sales Prices](#)

[View all sales prices for products that you sell to customers that belong to the selected price group.](#)

→	EU					EU
	FOREIGN	Foreign / Other countries				EXPORT
	NATIONAL	National				DOMESTIC
	NATIONWIDE	National Products				DOMESTIC
	US	United States				EXPORT
	WWT	Including WWT				EXPORT

**Dynamics 365 Business Central**

Customer Price Group US United States

Price List Lines 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100 101 102 103 104 105 106 107 108 109 110 111 112 113 114 115 116 117 118 119 120 121 122 123 124 125 126 127 128 129 130 131 132 133 134 135 136 137 138 139 140 141 142 143 144 145 146 147 148 149 150 151 152 153 154 155 156 157 158 159 160 161 162 163 164 165 166 167 168 169 170 171 172 173 174 175 176 177 178 179 180 181 182 183 184 185 186 187 188 189 190 191 192 193 194 195 196 197 198 199 200 201 202 203 204 205 206 207 208 209 210 211 212 213 214 215 216 217 218 219 220 221 222 223 224 225 226 227 228 229 230 231 232 233 234 235 236 237 238 239 240 241 242 243 244 245 246 247 248 249 250 251 252 253 254 255 256 257 258 259 260 261 262 263 264 265 266 267 268 269 270 271 272 273 274 275 276 277 278 279 280 281 282 283 284 285 286 287 288 289 290 291 292 293 294 295 296 297 298 299 300 301 302 303 304 305 306 307 308 309 310 311 312 313 314 315 316 317 318 319 320 321 322 323 324 325 326 327 328 329 330 331 332 333 334 335 336 337 338 339 340 341 342 343 344 345 346 347 348 349 350 351 352 353 354 355 356 357 358 359 360 361 362 363 364 365 366 367 368 369 370 371 372 373 374 375 376 377 378 379 380 381 382 383 384 385 386 387 388 389 390 391 392 393 394 395 396 397 398 399 400 401 402 403 404 405 406 407 408 409 410 411 412 413 414 415 416 417 418 419 420 421 422 423 424 425 426 427 428 429 430 431 432 433 434 435 436 437 438 439 440 441 442 443 444 445 446 447 448 449 450 451 452 453 454 455 456 457 458 459 460 461 462 463 464 465 466 467 468 469 470 471 472 473 474 475 476 477 478 479 480 481 482 483 484 485 486 487 488 489 490 491 492 493 494 495 496 497 498 499 500 501 502 503 504 505 506 507 508 509 510 511 512 513 514 515 516 517 518 519 520 521 522 523 524 525 526 527 528 529 530 531 532 533 534 535 536 537 538 539 540 541 542 543 544 545 546 547 548 549 550 551 552 553 554 555 556 557 558 559 560 561 562 563 564 565 566 567 568 569 570 571 572 573 574 575 576 577 578 579 580 581 582 583 584 585 586 587 588 589 590 591 592 593 594 595 596 597 598 599 600 601 602 603 604 605 606 607 608 609 610 611 612 613 614 615 616 617 618 619 620 621 622 623 624 625 626 627 628 629 630 631 632 633 634 635 636 637 638 639 640 641 642 643 644 645 646 647 648 649 650 651 652 653 654 655 656 657 658 659 660 661 662 663 664 665 666 667 668 669 670 671 672 673 674 675 676 677 678 679 680 681 682 683 684 685 686 687 688 689 690 691 692 693 694 695 696 697 698 699 700 701 702 703 704 705 706 707 708 709 710 711 712 713 714 715 716 717 718 719 720 721 722 723 724 725 726 727 728 729 730 731 732 733 734 735 736 737 738 739 740 741 742 743 744 745 746 747 748 749 750 751 752 753 754 755 756 757 758 759 760 761 762 763 764 765 766 767 768 769 770 771 772 773 774 775 776 777 778 779 780 781 782 783 784 785 786 787 788 789 790 791 792 793 794 795 796 797 798 799 800 801 802 803 804 805 806 807 808 809 810 811 812 813 814 815 816 817 818 819 820 821 822 823 824 825 826 827 828 829 830 831 832 833 834 835 836 837 838 839 840 841 842 843 844 845 846 847 848 849 850 851 852 853 854 855 856 857 858 859 860 861 862 863 864 865 866 867 868 869 870 871 872 873 874 875 876 877 878 879 880 881 882 883 884 885 886 887 888 889 890 891 892 893 894 895 896 897 898 899 900 901 902 903 904 905 906 907 908 909 910 911 912 913 914 915 916 917 918 919 920 921 922 923 924 925 926 927 928 929 930 931 932 933 934 935 936 937 938 939 940 941 942 943 944 945 946 947 948 949 950 951 952 953 954 955 956 957 958 959 960 961 962 963 964 965 966 967 968 969 970 971 972 973 974 975 976 977 978 979 980 981 982 983 984 985 986 987 988 989 990 991 992 993 994 995 996 997 998 999 1000 1001 1002 1003 1004 1005 1006 1007 1008 1009 1010 1011 1012 1013 1014 1015 1016 1017 1018 1019 1020 1021 1022 1023 1024 1025 1026 1027 1028 1

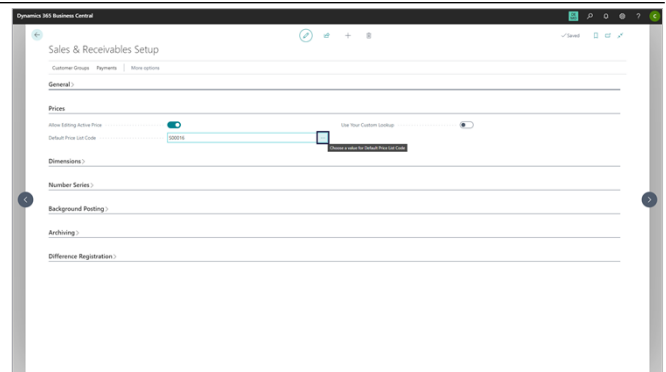
### 3.1.2. Sales prices BC25

Special sales prices and discounts provide flexibility and efficiency in managing pricing strategies. They enable the definition of customer-specific prices, volume-based discounts, and time-limited promotions. Prices and discounts can be set based on criteria such as customer groups, item categories, currencies, and date ranges. This ensures accurate pricing, supports diverse sales models, and reduces manual adjustments.

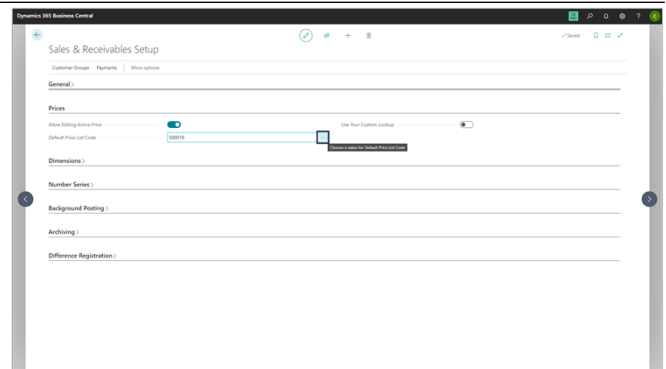


The Sales & Receivable Setup can be started by searching for it.

To allow to edit prices on active price lists for items, resources, customers, or other entities that use pricing, turn on the Allow Editing Active Price toggle.

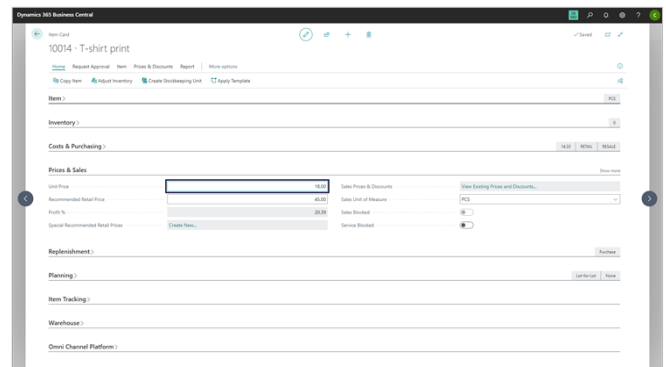


Field Default Price List Code specifies the code of the existing sales price list that stores all new price lines created in the price worksheet page.



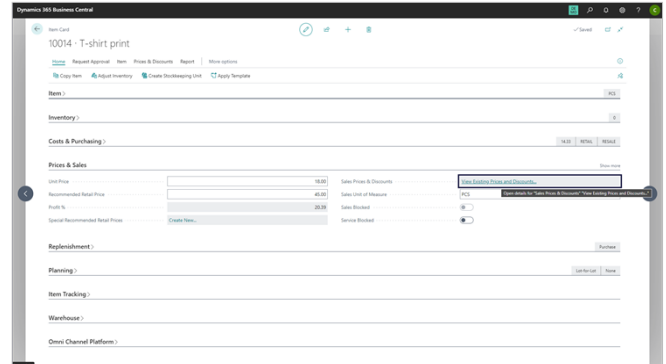
#### 3.1.2.1. Default sales price and special sales price lists

The default sales price of an item can be entered in the Unit Price field on the item card.

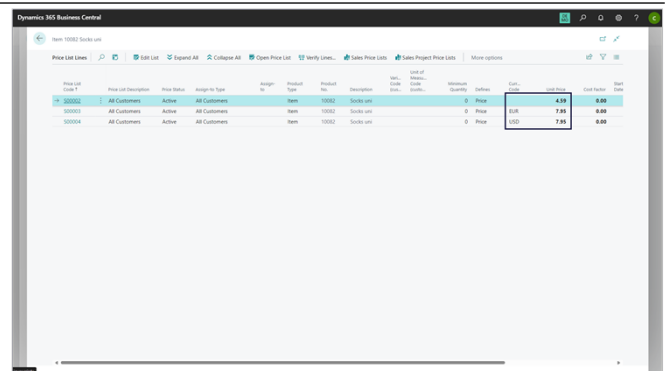


## K3 Pebblestone

It is possible to create special sales price lists where a specific price, different from the default, can be set for an item.

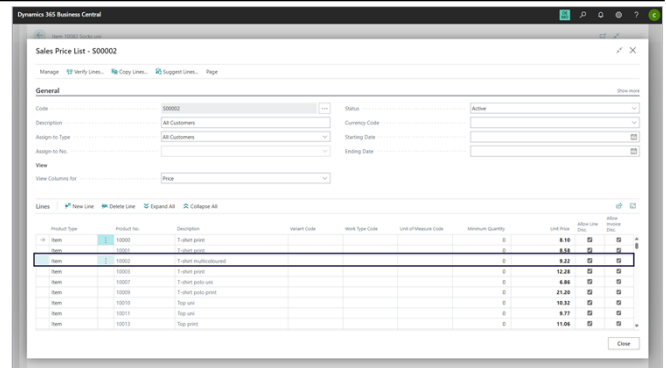


It is possible to add the same item to multiple price lists, such as a price list for all customers, a specific customer price group like a country, a particular customer, or a specific campaign. The item price can be defined for each price list in a different currency, for a specific period, unit of measure, or minimum quantity.

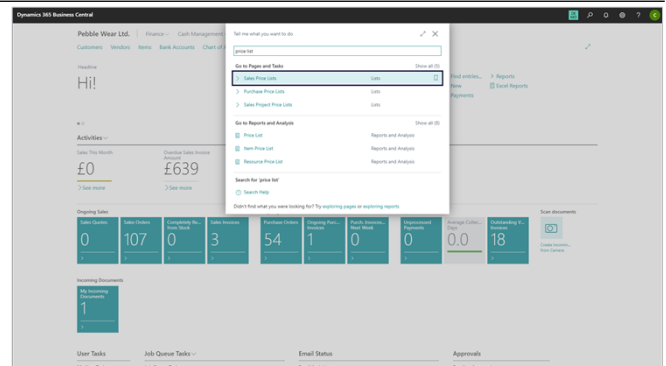


Product No.	Description	Variant Code	Work Type Code	Unit of Measure Code	Minimum Quantity	Unit Price	Price
10002	All Customers	Active	All Customers	Item	10002	Scale unit	4.59
10003	All Customers	Active	All Customers	Item	10002	Scale unit	7.81
10004	All Customers	Active	All Customers	Item	10002	Scale unit	7.81

By opening a price list, you can adjust the price of an item on that specific list. To do this, the price list must be in Draft status, and after making the adjustment, it should be set to Active.



The Sales Price Lists can also be started by searching for it.



System: M&S Business Central										
<a href="#">Home</a> <a href="#">Reports</a> <a href="#">Tools</a> <a href="#">Help</a>										
<a href="#">File</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Format</a> <a href="#">Tools</a> <a href="#">Window</a> <a href="#">Help</a>										
<a href="#">New</a> <a href="#">Open</a> <a href="#">Save</a> <a href="#">Print</a> <a href="#">Find</a> <a href="#">Replace</a> <a href="#">Undo</a> <a href="#">Redo</a> <a href="#">Cut</a> <a href="#">Copy</a> <a href="#">Paste</a> <a href="#">Delete</a> <a href="#">Insert</a> <a href="#">Format</a> <a href="#">Align</a> <a href="#">Text</a> <a href="#">List</a> <a href="#">Table</a> <a href="#">Grid</a> <a href="#">Zoom</a> <a href="#">Full Screen</a> <a href="#">Exit</a>										
Line #	Description	Name	Allow Discount?	Units	Default	Currency	Assign To	Billing Date	Billing Date	
100001	1 Default price MS.	Achsa	<input checked="" type="checkbox"/>		Price & Discount		All Customers			
100002	All Customers	Achsa	<input type="checkbox"/>		Price	BUR	All Customers			
100003	All Customers	Achsa	<input type="checkbox"/>		Price	BUR	All Customers			
100004	Customer Price Group E-I	Achsa	<input type="checkbox"/>		Price & Discount	BUR	Customer Price Group E-I			
100005	Customer Price Group E-I	Achsa	<input type="checkbox"/>		Price & Discount	BUR	Customer Price Group E-I			
100007	Customer Price Group E-I	Achsa	<input type="checkbox"/>		Price & Discount	USD	Customer Price Group E-I			
100008	Customer Price Group NATIONAL	Achsa	<input type="checkbox"/>		Price & Discount	BUR	Customer Price Group NATIONAL			
100009	Customer Price Group NATIONAL	Achsa	<input type="checkbox"/>		Price	BUR	Customer Price Group NATIONAL			
100010	Customer Price Group NATIONAL	Achsa	<input type="checkbox"/>		Price	USD	Customer Price Group NATIONAL			
100011	Customer Price Group NATRESALE	Achsa	<input type="checkbox"/>		Price & Discount	BUR	Customer Price Group NATRESALE			
100012	Customer Price Group NATRESALE	Achsa	<input type="checkbox"/>		Price	BUR	Customer Price Group NATRESALE			
100013	Customer Price Group NATRESALE	Achsa	<input type="checkbox"/>		Price & Discount	USD	Customer Price Group NATRESALE			
100014	Customer Price Group LARGE ACC	Achsa	<input type="checkbox"/>		Discount		Customer Price Group LARGE ACC			
100015	Customer Price Group STENO	Achsa	<input type="checkbox"/>		Discount		Customer Price Group STENO			
100016	Default price MS.	Achsa	<input type="checkbox"/>		Price & Discount		All Customers			
100017	Sales Price FORSDEN	Dash	<input type="checkbox"/>		Price & Discount	USD	Customer Price Group FORSDEN			
100018	Customer Price Group L-1, 100%	Achsa	<input type="checkbox"/>		Price & Discount	USD	Customer Price Group L-1, 100%			
100019	Customer Price Group L-2, 100%ms PRIB	Achsa	<input type="checkbox"/>		Price & Discount	USD	Customer Price Group L-2, 100%ms PRIB	5/1/2025	10/1/2025	

**Customer PO**

500019

Copy Lines... Suggest Items... More options

---

**General**

Date:	2025/11	Status:	Pending
Description:	Customer Price Group US - standard PRDS	Currency Code:	USD
Assigning To:	Customer Price Group	Starting Date:	9/1/2025
Name:	All Customers	Ending Date:	12/31/2025
New Customer No:	Customer		
	Customer Price Group		
	Language		
	Country		

Lines New Line Delete Line Expand All Expand All Collapse All

Product Type	Product No.	Description	Itemcat Code	Mark Type Code	Unit of Measure Code	Minimum Quantity	Default	Order Price	Line Discount %	Net Price
Materia	10000	T-shirt polo	PCS	0	Price			\$ 6.00	0.00	\$ 6.00
Materia	10001	TrackSuit jacket suit	PCS	0	Price			\$ 20.00	0.00	\$ 20.00
Materia	10002	Jeanse	PCS	0	Price			\$ 8.00	0.00	\$ 8.00

**Inventory 360 Business Central**

Inventory Item: **5000119** Save Print

Get ready links: [Copy Links...](#) [Export Links...](#) [More options](#)

### General

Date:	2020/11	Status:	Active
Description:	Customer Price Group US - automatic PRICES	Currency Code:	USD
Assign to Type:	Customer Price Group	Starting Date:	9/1/2005
Assign to No.	US	Ending Date:	12/31/2020
Name:	<b>Price &amp; Discount</b>		
Name (Country No.)			

[Back & Forward](#)

Links: [New Line](#) | [Delete Line](#) | [Expand](#) | [Expand All](#) | [Collapse All](#)

Product No.	Product No.	Description	Variant Code	Stock Type Code	Unit of Measure	Minimum Quantity	Default	Unit Price	Line Discount %	Net Price
Martinie	10000	T-shirt print		PCL	S	0	Price	\$4.00	0.00	\$4.00
Martinie	10000	Technical jacket print		PCL	S	0	Price	\$9.00	0.00	\$9.00
Martinie	10000	Jeanne		PCS	L	0	Price	\$8.00	0.00	\$8.00

**Customer 360 Business Central**

500019

70 Party Lines... 1 Copy Lines... 2 Suggest Lines... 3 More options

**General**

Code: 500019  
 Description: Customer Price Group US - standard FRSL  
 Assign to Type: Starting Price Group  
 Assign to No: US  
 Note: Price & Discount

Status: Enabled  
 Currency Code: USD  
 Starting Date: 1/1/2023  
 Ending Date: 12/31/2023

Line Item: 1  
 Description: 10 dollar  
 Quantity: 1  
 Unit Price: \$10.00  
 Total Price: \$10.00

Line Item: 2  
 Description: 20 dollar  
 Quantity: 1  
 Unit Price: \$20.00  
 Total Price: \$20.00

Line Item: 3  
 Description: 30 dollar  
 Quantity: 1  
 Unit Price: \$30.00  
 Total Price: \$30.00

Line Item: 4  
 Description: 40 dollar  
 Quantity: 1  
 Unit Price: \$40.00  
 Total Price: \$40.00

Line Item: 5  
 Description: 50 dollar  
 Quantity: 1  
 Unit Price: \$50.00  
 Total Price: \$50.00

Line Item: 6  
 Description: 60 dollar  
 Quantity: 1  
 Unit Price: \$60.00  
 Total Price: \$60.00

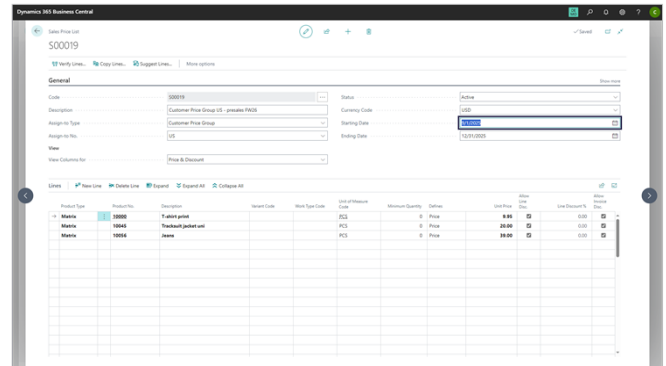
Line Item: 7  
 Description: 70 dollar  
 Quantity: 1  
 Unit Price: \$70.00  
 Total Price: \$70.00

Line Item: 8  
 Description: 80 dollar  
 Quantity: 1  
 Unit Price: \$80.00  
 Total Price: \$80.00

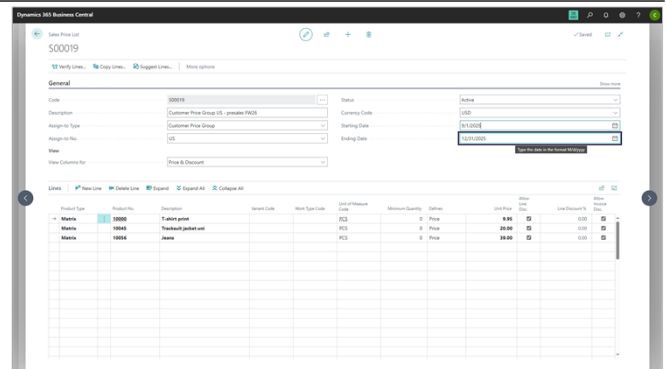
Line Item: 9  
 Description: 90 dollar  
 Quantity: 1  
 Unit Price: \$90.00  
 Total Price: \$90.00

Line Item: 10  
 Description: 100 dollar  
 Quantity: 1  
 Unit Price: \$100.00  
 Total Price: \$100.00

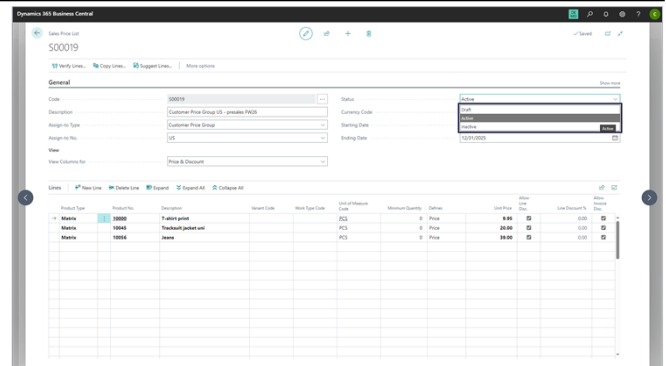
The Starting Date specifies the date from which the price is valid.



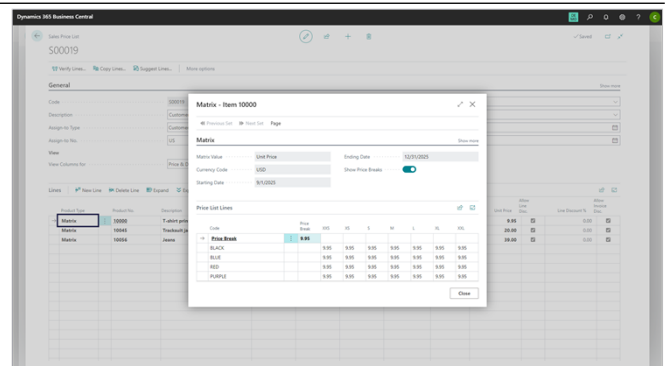
The Ending Date specifies the last date the price is valid.



The Status field specifies whether the price list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and can be edited (when Allow Editing Active Price is enabled) and used for price calculations.



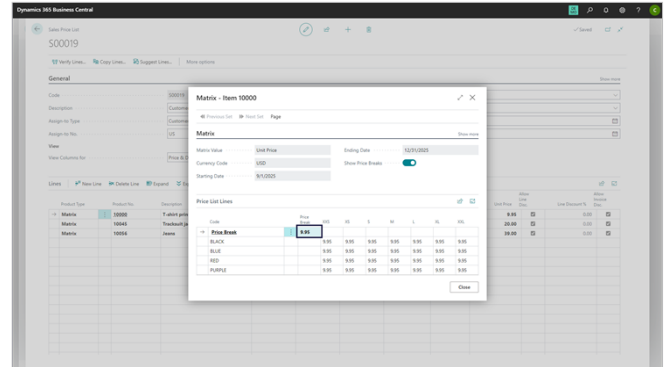
When in the sales price list line the Product Type is Item, it is possible to enter a Unit Price for an item. When in the sales price list line the Product Type is Matrix, it is possible to enter the price per variant in a matrix format.



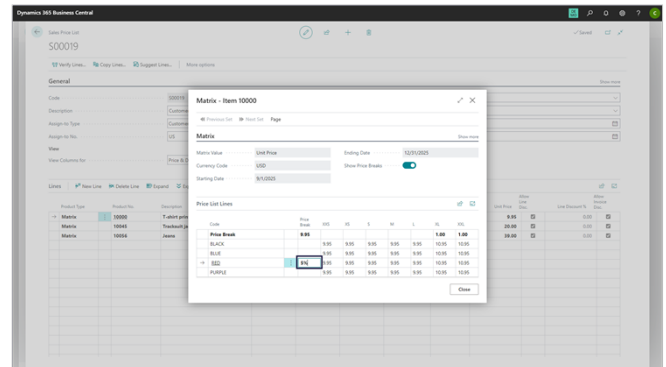


## K3 Pebblestone

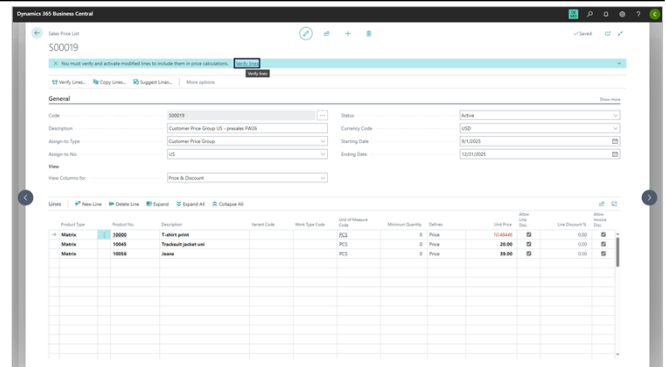
By using the general field at the top left of the Price Break row and column, all variants can be filled at once with the entered amount.



In the Price Break row or column, an additional amount or percentage can be entered, which will be applied to all variants in the respective row or column.

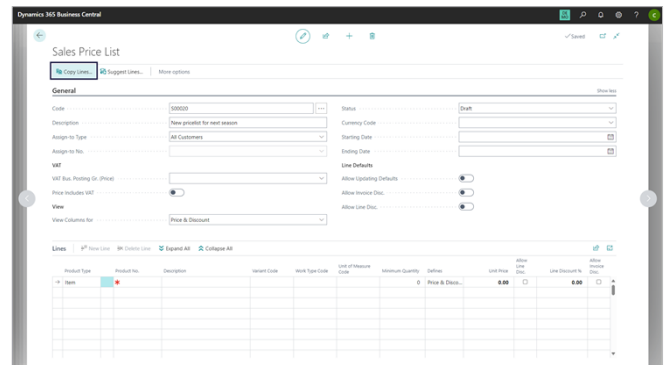


The Verify Lines function checks data consistency in the new and modified price list lines, finds the duplicate price lines and suggests the resolution of the line conflicts.

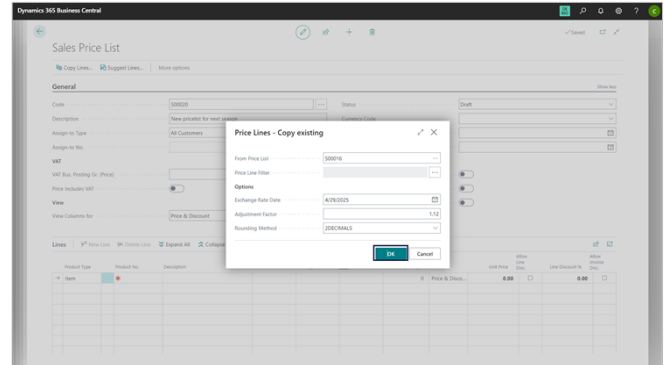


### 3.1.2.2. Creating sales price lists

By creating a new sales price list and then using the Copy Lines function, items with prices from another list can be copied into the new list.



When retrieving existing prices, an adjustment factor can be entered, which will be multiplied with the retrieved prices and rounded according to the specified rounding method. For prices in a different currency, the desired exchange rate date can also be specified.



### 3.1.2.3. Best price principle

The sales price engine uses the best price principle. When multiple price lines are found, a price line with a variant code and/or a currency specified, will have priority over a price line without. When these priorities have been applied and there are still multiple price lines the price line with the lowest price will be picked.

Thank you for watching!



### 3.1.3. Recommended Retail Prices BC25

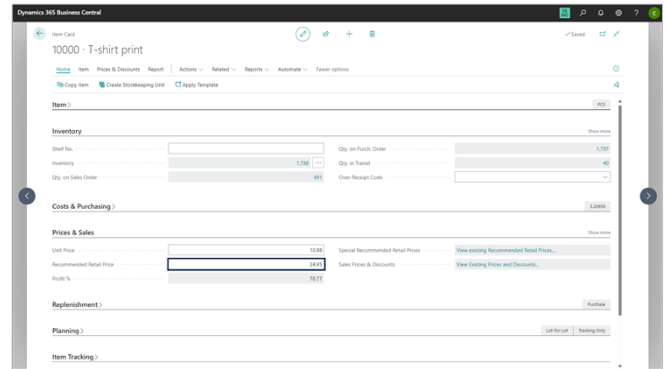
In Business Central, the Recommended Retail Price (RRP) represents the sales price plus a margin for the retailer. It can be recorded at the item variant level within the matrices. This RRP can then be used in the layouts of documents, such as sales quotes or order confirmations, to clearly communicate suggested retail pricing to customers.



#### 3.1.3.1. Default recommended retail price and special recommended

## retail price lists

The default recommended retail price (RRP) of an item can be entered in the Recommended Retail Price field on the item card.



Item Card: 10000 - T-shirt print

Inventory

Costs & Purchasing

Prices & Sales

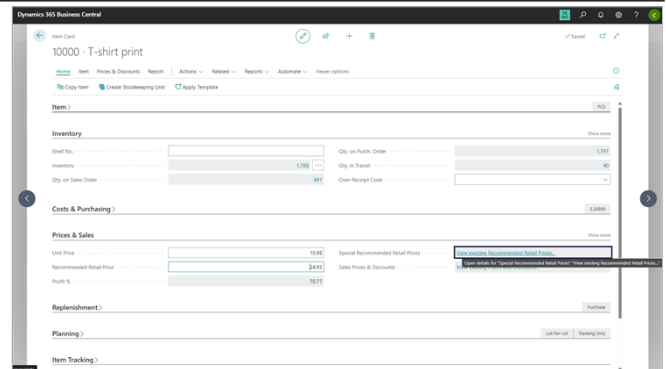
Unit Price	10.00	Special Recommended Retail Price	View existing Recommended Retail Prices...
Recommended Retail Price	24.95	Sales Prices & Discounts	View Existing Prices and Discounts...
Profit %	70.77		

Replenishment

Planning

Item Tracking

It is possible to create special recommended retail price lists where a specific price, different from the default, can be set for an item.



Item Card: 10000 - T-shirt print

Inventory

Costs & Purchasing

Prices & Sales

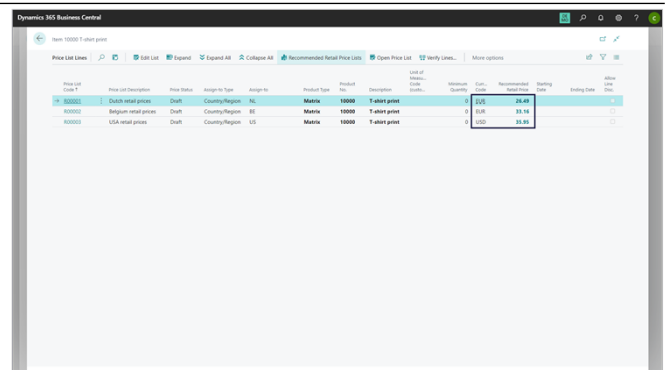
Unit Price	10.00	Special Recommended Retail Price	View existing Recommended Retail Prices...
Recommended Retail Price	24.95	Sales Prices & Discounts	View Existing Prices and Discounts...
Profit %	70.77		

Replenishment

Planning

Item Tracking

It is possible to add the same item to multiple recommended retail price lists, such as a price list for specific countries, customer price group or all customers. The item price can be defined for each price list in a different currency, for a specific period, unit of measure, or minimum quantity.

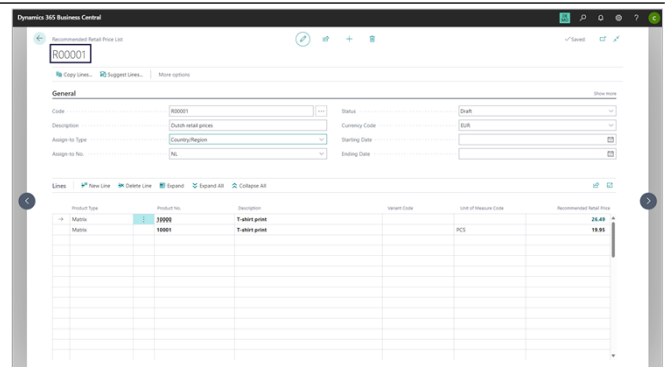


Item Card: 10000 - T-shirt print

Recommended Retail Price List

Price List Code	Price List Description	Price Status	Assign To Type	Assign To	Product Type	Product No.	Description	Unit of Measure	Quantity	Recommended Retail Price	Starting Date	Ending Date
RL0001	Dutch retail prices	Draft	Country/Region	NL	Matrix	10000	T-shirt print	USD	1	24.95		
RL0002	Belgium retail prices	Draft	Country/Region	BE	Matrix	10000	T-shirt print	EUR	1	24.95		
RL0003	USA retail prices	Draft	Country/Region	US	Matrix	10000	T-shirt print	USD	1	24.95		

By opening a price list, you can adjust the recommended retail price of an item on that specific list. To do this, the price list must be in Draft status, and after making the adjustment, it should be set to Active.



Item Card: 10000 - T-shirt print

Recommended Retail Price List

General

Code: RL0001

Description: Dutch retail prices

Assign To Type: Country/Region

Assign To: NL

Status: Draft

Starting Date: 6/16/2025

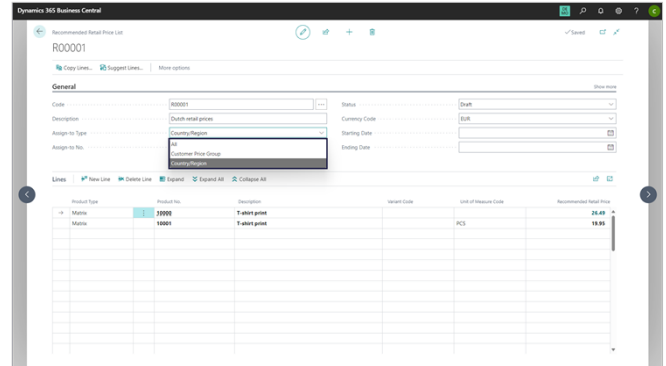
Ending Date: 6/16/2025

Lines

Product Type	Product No.	Description	Variant Code	Unit of Measure Code	Recommended Retail Price
Matrix	10000	T-shirt print		USD	24.95
Matrix	10001	T-shirt print		USD	24.95

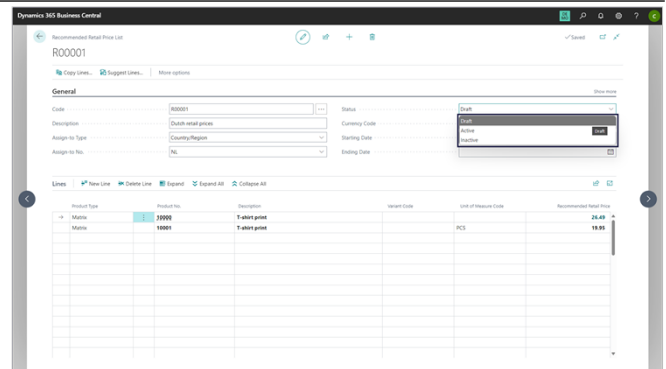
### K3 Pebblestone

The Assign-to Type field specifies the type of entity to which the recommended retail price list is assigned. The options are relevant to the entity you are currently viewing.



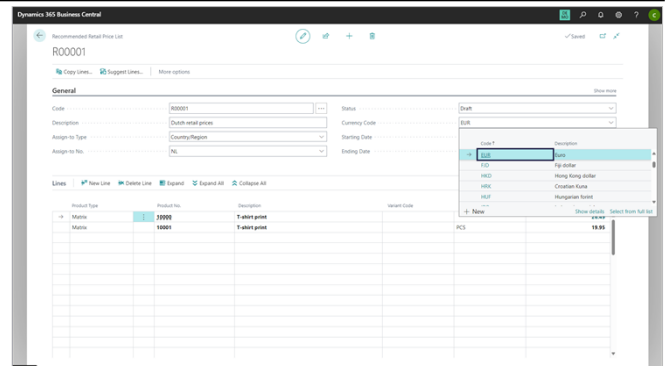
The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. The 'Assign-to Type' dropdown is open, showing options: 'Customer Price Group' and 'Country/Region'. The 'Customer Price Group' option is selected.

The Status field specifies whether the price list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and can be edited (when Allow Editing Active Price is enabled) and used for price calculations.



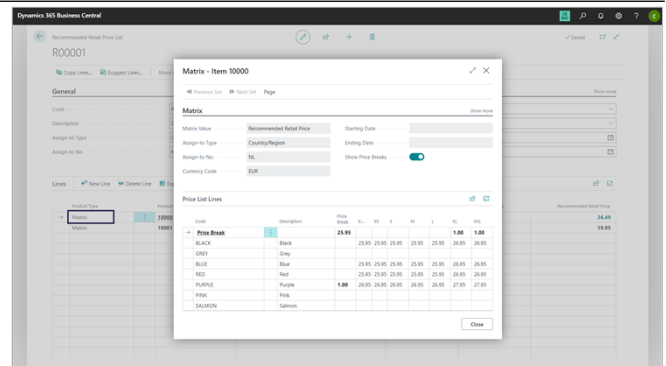
The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. The 'Status' dropdown is open, showing options: 'Draft', 'Inactive', and 'Active'. The 'Draft' option is selected.

The Currency Code field specifies the currency code of the price list.



The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. The 'Currency Code' dropdown is open, showing options: 'USD', 'EUR', 'GBP', 'JPY', 'AUD', 'CAD', 'CHF', 'CNY', 'HKD', 'INR', 'KRW', 'MXN', 'NZD', 'SGD', 'THB', 'TRY', 'ZAR'. The 'USD' option is selected.

When in the sales price list line the Product Type is Item, it is possible to enter a Unit Price for an item. When in the sales price list line the Product Type is Matrix, it is possible to enter the price per variant in a matrix format.

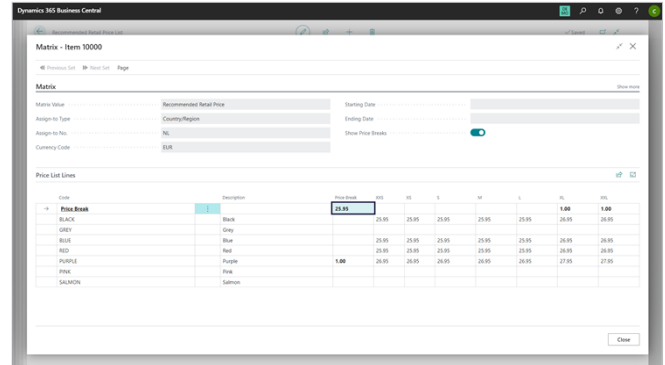


The screenshot shows the 'Recommended Retail Price List' form in Dynamics 365 Business Central. A 'Matrix - Item 10000' dialog box is open, showing a table of price breaks for different variants of the item.

Code	Description	Price Break	U	HS	S	M	L	XL	XXL
BLACK	Black	25.95	25.95	25.95	25.95	25.95	25.95	25.95	25.95
GREEN	Green	25.95	25.95	25.95	25.95	25.95	25.95	25.95	25.95
BLUE	Blue	25.95	25.95	25.95	25.95	25.95	25.95	25.95	25.95
RED	Red	25.95	25.95	25.95	25.95	25.95	25.95	25.95	25.95
PURPLE	Purple	1.00	25.95	25.95	25.95	25.95	25.95	25.95	25.95
PINK	Pink								
UNKNOWN	Unknown								

## K3 Pebblestone

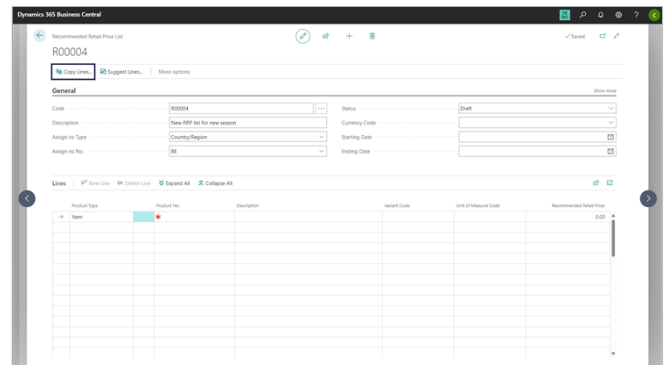
By using the general field at the top left of the Price Break row and column, all variants can be filled at once with the entered amount. In the Price Break row or column, an additional amount or percentage can be entered, which will be applied to all variants in the respective row or column.



The screenshot shows the 'Price Breaks' window in Dynamics 365 Business Central. It displays a table with columns for 'Code', 'Description', 'Price Break', 'USD', 'EUR', 'GBP', 'JPY', 'AUD', 'CAD', 'CHF', 'CNY', 'HKD', 'INR', 'KRW', 'MXN', 'NZD', 'SGD', 'THB', 'TRY', 'ZAR', 'BRL', 'RUB', 'UAH', 'VND', 'IDR', 'MYR', 'PHP', 'TWD', 'NZD', 'AUD', 'CAD', 'CHF', 'CNY', 'HKD', 'INR', 'KRW', 'MXN', 'NZD', 'SGD', 'THB', 'TRY', 'ZAR', 'BRL', 'RUB', 'UAH', 'VND', 'IDR', 'MYR', 'PHP', 'TWD'. The 'Price Break' column is highlighted, and a value of '25.95' is entered in the first row.

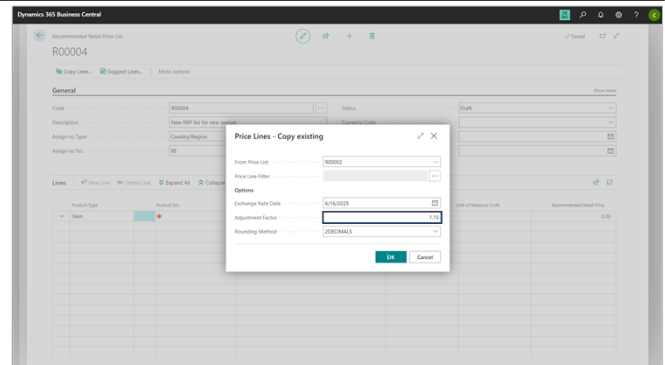
### 3.1.3.2. Creating sales price lists

By creating a new recommended retail price list and then using the Copy Lines function, items with prices from another list can be copied into the new list.



The screenshot shows the 'Recommended Retail Price List' window in Dynamics 365 Business Central. It displays a table with columns for 'Item', 'Product Type', 'Product No.', 'Description', 'Variant Code', 'Unit of Measure Code', and 'Recommended Retail Price'. The 'Recommended Retail Price' column is highlighted, and a value of '0.00' is entered in the first row.

When retrieving existing recommended retail prices, an adjustment factor can be entered, which will be multiplied with the retrieved prices and rounded according to the specified rounding method. For prices in a different currency, the desired exchange rate date can also be specified.



The screenshot shows the 'Price Lines - Copy existing' dialog box in Dynamics 365 Business Central. It contains fields for 'From Price List' (R00002), 'From Line Filter', 'Exchange Rate Date' (6/16/2025), 'Adjustment Factor' (1.0), and 'Rounding Method' (2DECIMALS). The 'OK' button is highlighted.

### 3.1.3.3. Best price principle

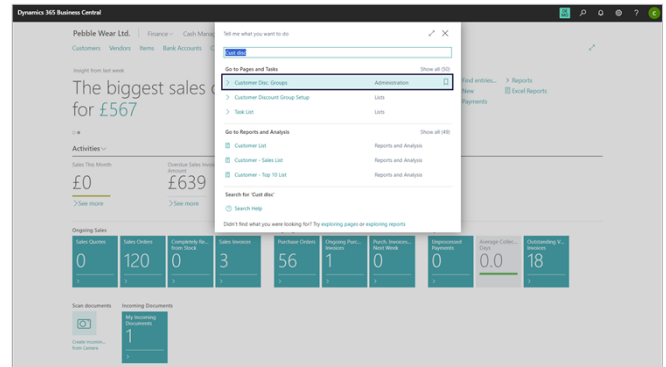
The price engine uses the best price principle. When multiple recommended retail price lines are found, a price line with a variant code and/or a currency specified, will have priority over a price line without. When these priorities have been applied and there are still multiple price lines the price line with the lowest price will be picked.

Thank you for watching!

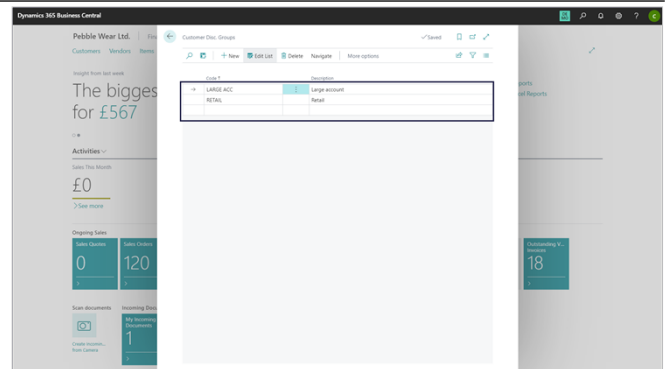
### 3.1.4. Customer Discounts Groups BC25

Customer Discount Groups in Business Central provide a structured method for managing various discount scenarios. Specific discount lists can be created for domestic and international customers, including lists in multiple currencies. Time-limited discounts for presales items can also be set up, with defined start and end dates. This functionality enables the assignment of tailored discount lists to specific customer groups, ensuring accurate and efficient discount management across different markets and conditions.

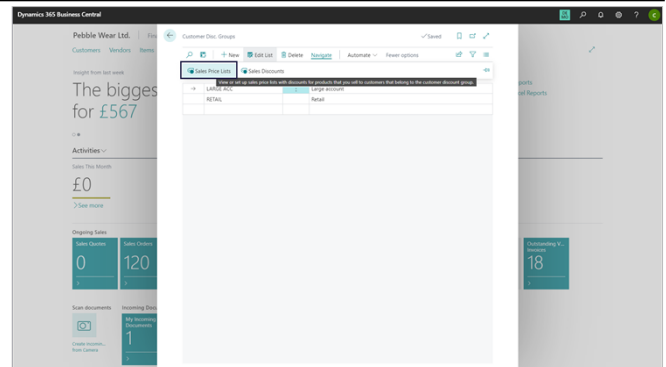
Customer Discount Groups can be found by using the search function.



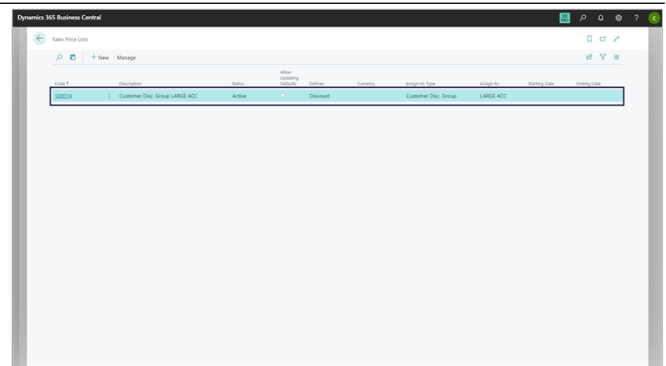
It is possible to create discount groups for different customer segments. Like Large Accounts and Retailers.



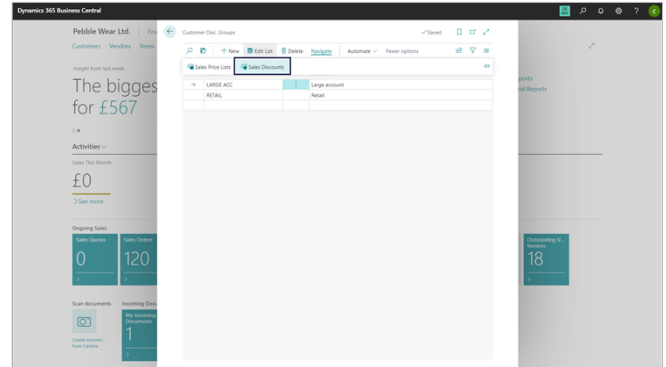
The Sales Price Lists option is available for selection.



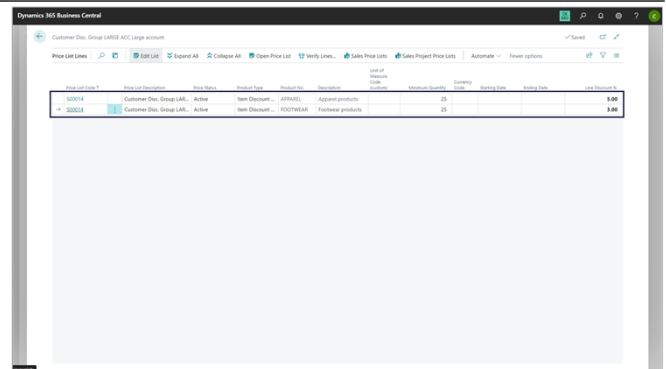
Multiple price lists can be linked to a certain customer discount group, such as a list with a different currency or a list with a specific start and end date.



The Sales Discounts option is also available for selection.



Selecting Sales Discounts provides insight into the different line discount percentages per customer discount group. From this screen, it is possible to maintain discounts for the selected price list.



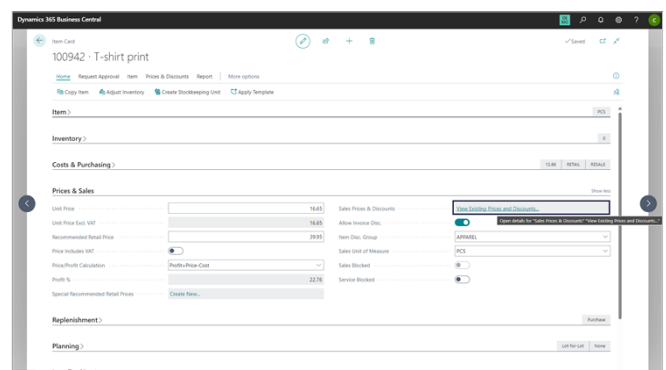
### 3.1.5. Sales discounts BC25

Special sales prices and discounts provide flexibility and efficiency in managing pricing strategies. They enable the definition of customer-specific prices, volume-based discounts, and time-limited promotions. Prices and discounts can be set based on criteria such as customer groups, item categories, currencies, and date ranges. This ensures accurate pricing, supports diverse sales models, and reduces manual adjustments.



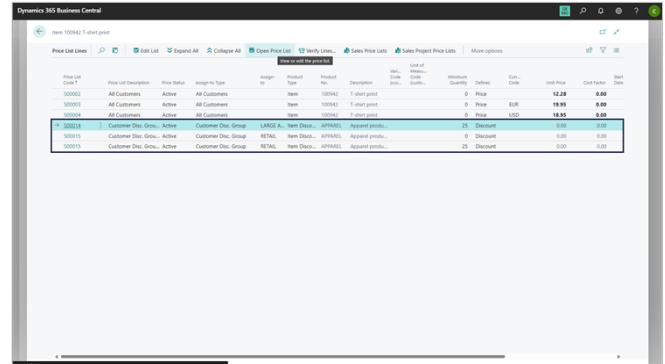
#### 3.1.5.1. Special sales discount lists

It is possible to create special sales price/discount lists where a specific discount can be set for an item.



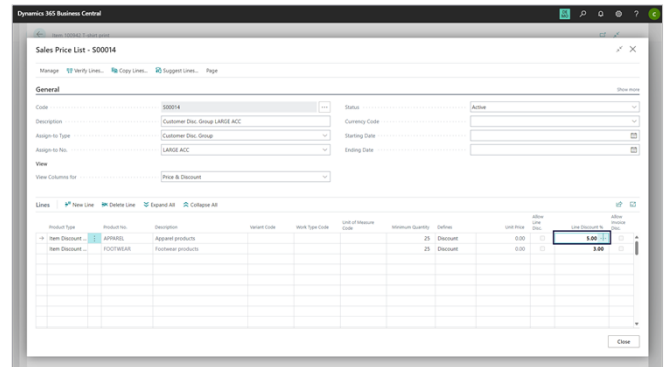


It is possible to add the same item to multiple price/discount lists, such as a discount list for all customers, a specific customer discount group like a country, a particular customer, or a specific campaign. The item discount can be defined for each discount list in a different currency, for a specific period, unit of measure, or minimum quantity.



Price List Code	Price List Description	Price Status	Assign To Type	Assign To	Product Type	Description	Unit of Measure	Minimum Quantity	Unit Price	Unit Value
000001	All Customers	Active	All Customers	Item	ITEM	T-shirt print	2	Price	EUR	12.58
000003	All Customers	Active	All Customers	Item	ITEM	T-shirt print	2	Price	EUR	18.55
000004	All Customers	Active	All Customers	Item	ITEM	T-shirt print	2	Price	USD	18.55
000005	Customer Disc. Group	Active	Customer Disc. Group	ITEM	ITEM	Apparel products	25	Discount	0.00	0.00
000010	Customer Disc. Group	Active	Customer Disc. Group	ITEM	ITEM	Apparel products	25	Discount	0.00	0.00
000011	Customer Disc. Group	Active	Customer Disc. Group	ITEM	ITEM	Apparel products	25	Discount	0.00	0.00

By opening a price/discount list, you can adjust the discount percentage of an item on that specific list. To do this, the price list must be in Draft status, and after making the adjustment, it should be set to Active.

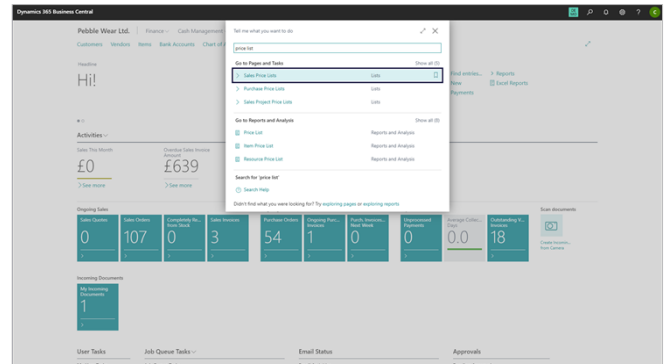


Code	Description	Assign To Type	Assign To	Status	Starting Date	Ending Date
000014	Customer Disc. Group LARISE ACC	Customer Disc. Group	LARISE ACC	Active		

Product Type	Product No.	Description	Unit of Measure	Minimum Quantity	Unit Price	Unit Value
Item Discount	APPEARL	Apparel products	25	Discount	0.00	0.00
Item Discount	FOOTWEAR	Footwear products	25	Discount	0.00	0.00

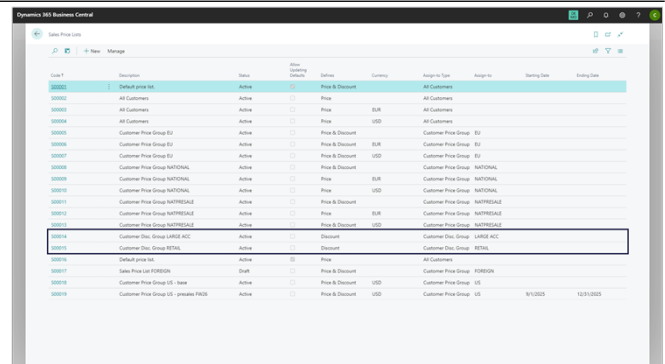
The Sales Price/Discount Lists can also be started by searching for it.



Search results for 'Sales Price List':

- Go to Pages and Tools: Sales Price List (Link)
- Go to Reports and Analysis: Price List (Link), Item Price List (Link), Resource Price List (Link)

As mentioned earlier, sales discount lists can be created for different groups, with varying items and prices. This can be done per country, customer price group, customer agreement, for a specific period, for a certain unit of measure, currency, or starting from a minimum quantity.

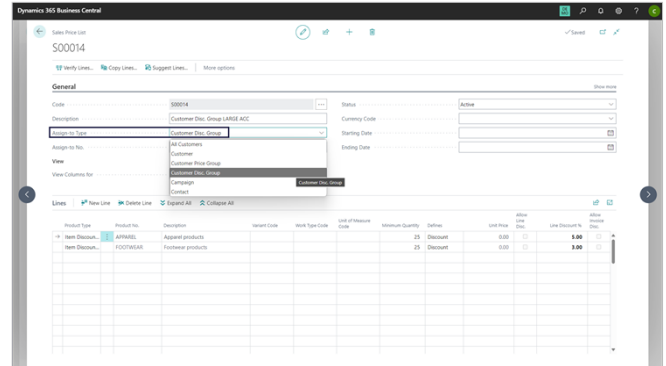


Code	Description	Status	Assign To Type	Assign To	Starting Date	Ending Date
000001	Default price list	Active	All Customers	Item		
000003	All Customers	Active	All Customers	Item		
000004	All Customers	Active	All Customers	Item		
000005	Customer Price Group E1	Active	Customer Price Group	E1		
000006	Customer Price Group E2	Active	Customer Price Group	E2		
000007	Customer Price Group E3	Active	Customer Price Group	E3		
000008	Customer Price Group NATIONAL	Active	Customer Price Group	NATIONAL		
000009	Customer Price Group NATIONAL	Active	Customer Price Group	NATIONAL		
000010	Customer Price Group NATIONAL	Active	Customer Price Group	NATIONAL		
000011	Customer Price Group NATIONAL	Active	Customer Price Group	NATIONAL		
000012	Customer Price Group NATIONAL	Active	Customer Price Group	NATIONAL		
000013	Customer Price Group NATIONAL	Active	Customer Price Group	NATIONAL		
000014	Customer Price Group LARISE ACC	Active	Customer Price Group	LARISE ACC		
000015	Customer Price Group RETAIL	Active	Customer Price Group	RETAIL		
000016	Default price list	Active	All Customers	Item		
000017	Sales Price List FOREIGN	Draft	Customer Price Group	FOREIGN		
000018	Customer Price Group US - Sale	Active	Customer Price Group	US	9/1/2025	12/31/2025
000019	Customer Price Group US - Wholesale	Active	Customer Price Group	US	9/1/2025	12/31/2025

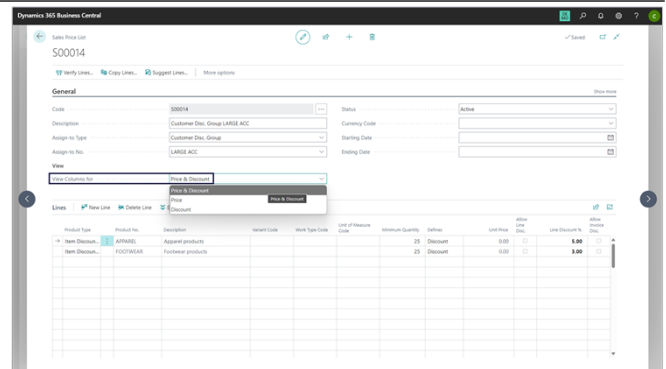


## K3 Pebblestone

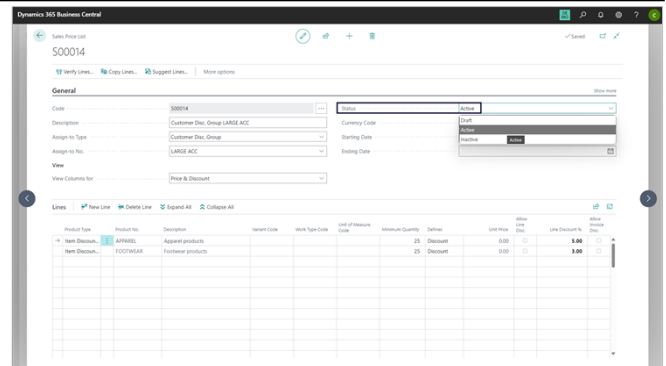
The Assign-to Type field specifies the type of entity to which the discount list is assigned. The options are relevant to the entity you are currently viewing.



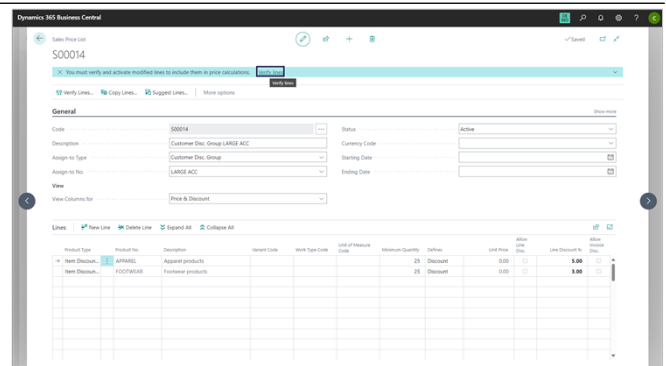
The View Columns for field specifies the amount type filter that defines the columns shown in the price list lines.



The Status field specifies whether the price/discount list is in Draft status and can be edited, Inactive and cannot be edited or used, or Active and can be edited (when Allow Editing Active Price is enabled) and used for price calculations.

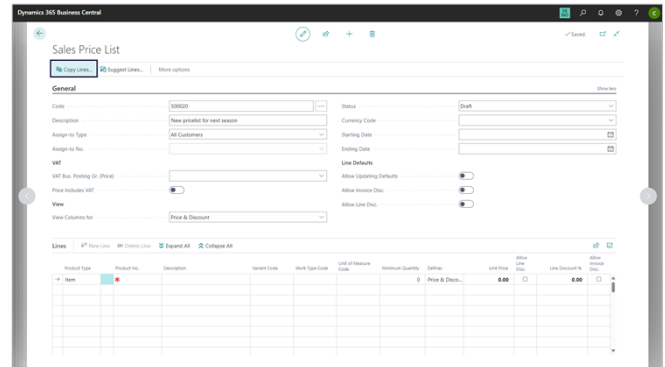


The Verify Lines function checks data consistency in the new and modified discount list lines, finds the duplicate discount lines and suggests the resolution of the line conflicts.

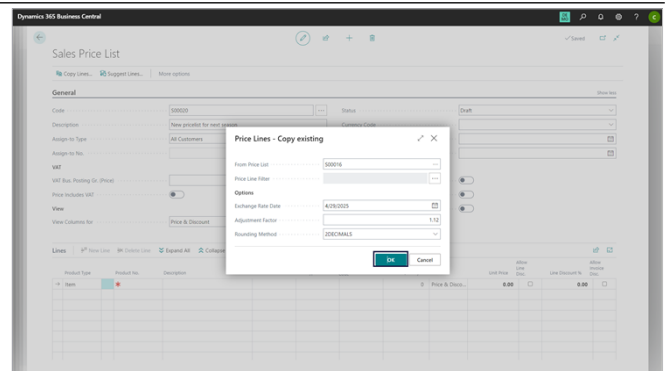


### 3.1.5.2. Creating sales price lists

By creating a new sales price list and then using the Copy Lines function, items with discounts from another list can be copied into the new list.



When retrieving existing discounts percentages, an adjustment factor can be entered, which will be multiplied with the retrieved discount percentages and rounded according to the specified rounding method.



### 3.1.5.3. Best price principle

The sales price/discount engine uses the best price principle.

When multiple discount lines are found, the discount line with the highest discount will be picked.

Thank you for watching!

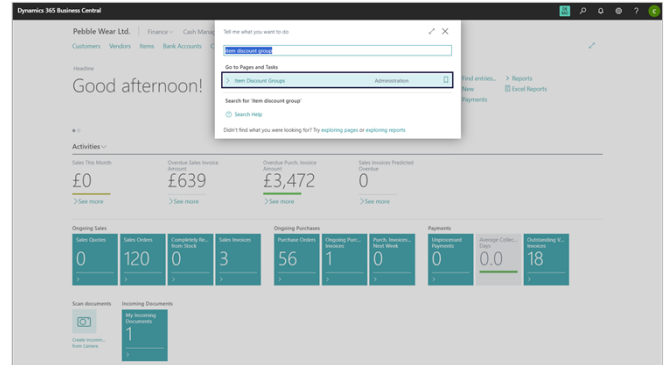


### 3.1.6. Item Discount Groups BC25

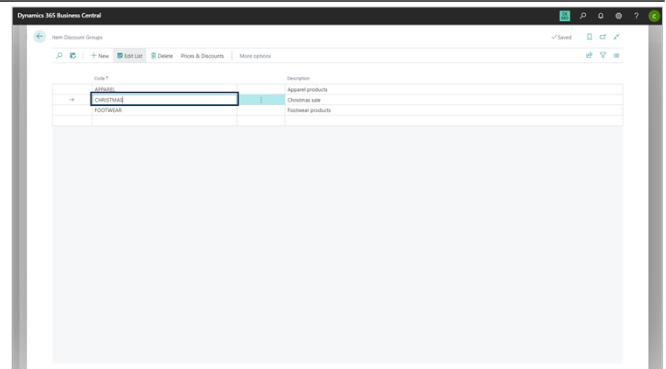
Item Discount Groups in Business Central provide a structured method for managing various discount scenarios on item level. Time-limited discounts can be set up, with defined start and end dates. This functionality enables the assignment of tailored discount lists to specific item discount groups, ensuring accurate and efficient discount management across different markets and conditions.

## K3 Pebblestone

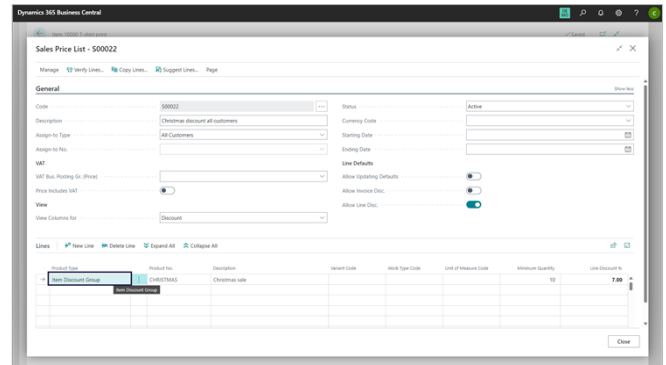
Item Discount Groups can be found by using the search function.



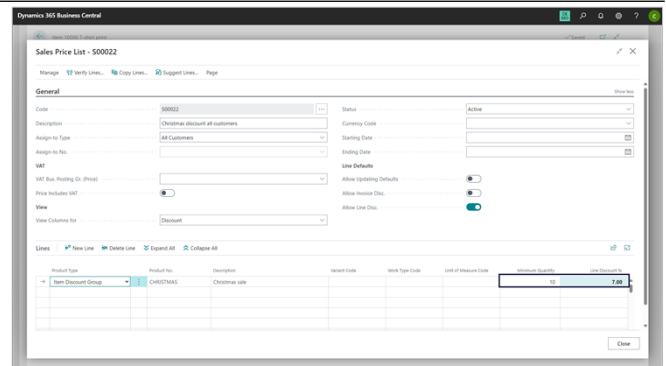
Multiple item discount groups can be created.



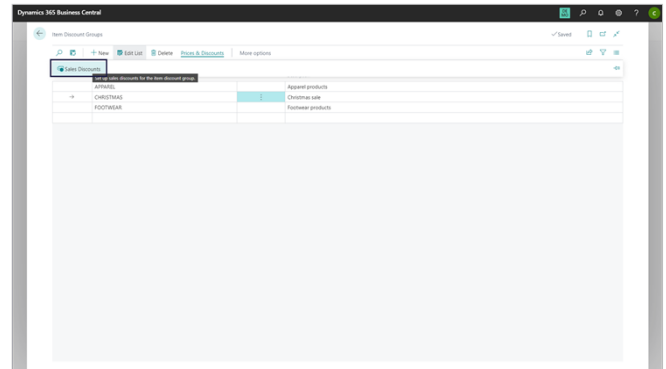
By creating a sales price list with the product type Item Discount Group, it can be linked to an Item Discount Group.



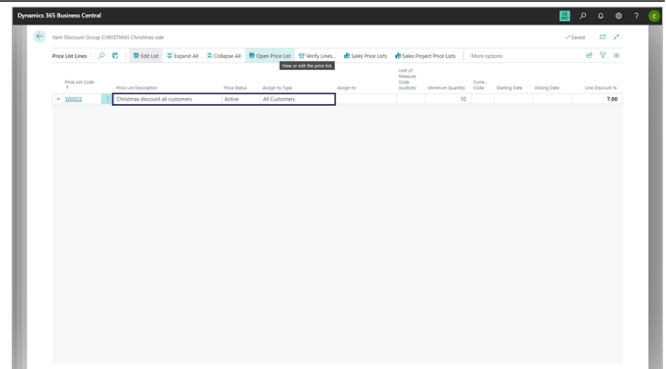
In the sales price line with product type Item Discount Group, select a group, a minimum quantity, and a line discount percentage.



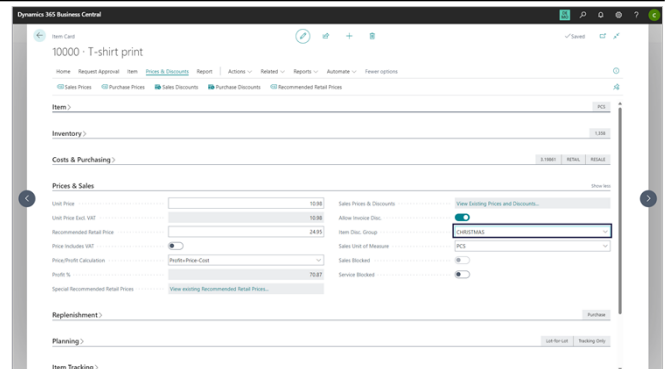
Check whether the created sales price list with the Item Discount Group is linked to the corresponding Item Discount Group.



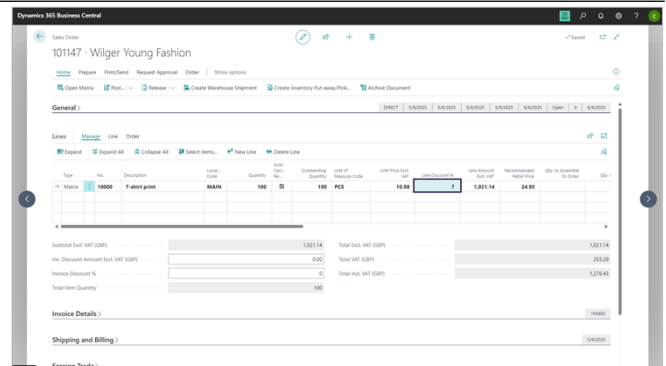
All sales price lists with Product Type 'Item Discount Group' are displayed.



Link the item to the Item Discount Group.



When entering the sales order, customers receive the specified discount for this item if the quantity exceeds the minimum.

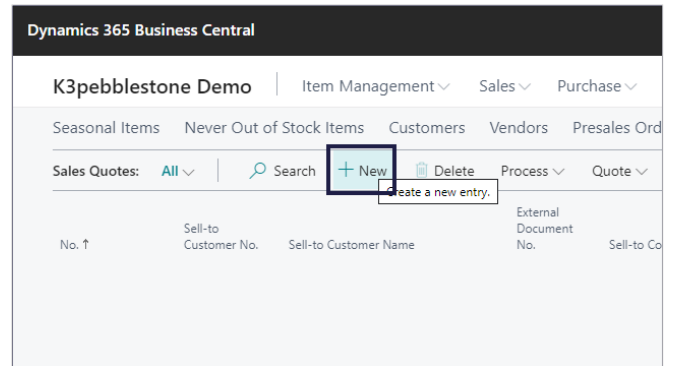


## 3.2. Sales orders and quotes

### 3.2.1. Sales Quote

#### 3.2.1.1. Create a Sales Quote

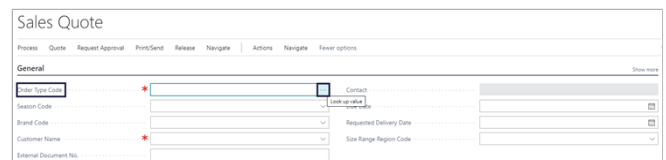
Click on the navigation menu item **New**



The screenshot shows the Dynamics 365 Business Central interface. At the top, there's a header bar with 'Dynamics 365 Business Central' and a sub-header 'K3pebblestone Demo'. Below this, there are navigation tabs: 'Seasonal Items', 'Never Out of Stock Items', 'Customers', 'Vendors', and 'Presales Ord'. The main area displays a table for 'Sales Quotes'. The table has columns: 'No. ↑', 'Sell-to Customer No.', 'Sell-to Customer Name', 'External Document No.', and 'Sell-to Co'. Above the table, there are action buttons: '+ New', 'Delete', 'Process', and 'Quote'. The '+ New' button is highlighted with a red box, and a tooltip 'Create a new entry.' is visible next to it.

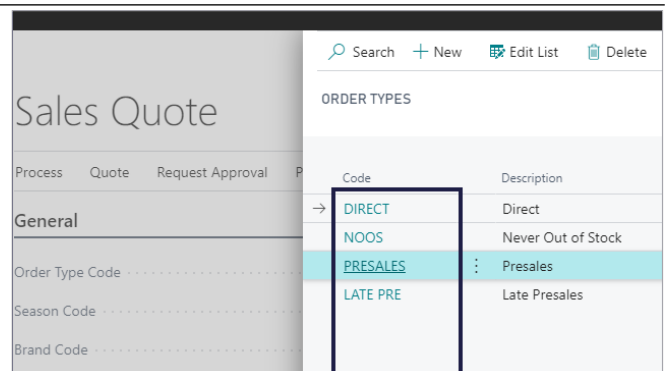
#### 3.2.1.2. General

- **Order Type Code.**  
Specifies a code for the order type that this sales quote belongs to.
- Click on the lookup button **Order Type Code**.



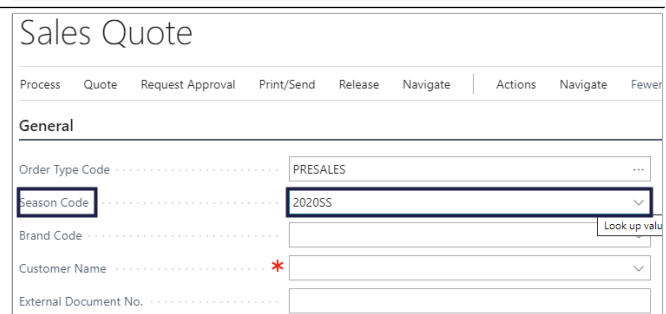
The screenshot shows the 'Sales Quote' form. The 'General' tab is selected. The 'Order Type Code' field is highlighted with a red box, and a red asterisk indicates it's a required field. A 'Lookup value' button is visible next to the field. Other fields include 'Season Code', 'Brand Code', 'Customer Name', and 'External Document No.'.

Click on the link in cell **Code** on any row



The screenshot shows the 'Sales Quote' form with the 'ORDER TYPES' dropdown menu open. The menu lists four options: 'DIRECT', 'NOOS', 'PRESALES', and 'LATE PRE'. The 'PRESALES' option is highlighted with a red box. The dropdown is titled 'ORDER TYPES' and has a search bar at the top.

- **Season Code.**  
Specifies a code for the season that this sales quote belongs to.
- Move the mouse to the field **Season Code**.



The screenshot shows the 'Sales Quote' form. The 'Season Code' field is highlighted with a red box and contains the value '2020SS'. A 'Lookup value' button is visible next to the field. Other fields include 'Order Type Code' (set to 'PRESALES'), 'Brand Code', 'Customer Name', and 'External Document No.'.

- **Brand Code.**  
Specifies a code for the brand that this sales quote belongs to.
- Click on the lookup button **Brand Code**.
- Click on the link in cell **Code** on any row.

SALES QUOTE | WORK DATE: 1/18/2018

1005

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

**General**

Order Type Code ..... PRESALES ..... Contact .....

Season Code ..... 2020SS ..... Due Date .....

Brand Code ..... Requested .....

Customer Name ..... \*

External Document No. ....> ADVENTURE Adventure Sporting Goods Ltd.

Code 1	Description
ADVENTURE	Adventure Sporting Goods Ltd.
AWESOME	Awesome Clothing Ltd.
CPS	Select record "AWESOME" rfield Shop
NORTHWIND	Northwind Outdoor Goods Ltd.
PALLISER	PALLISER

Lines Manage Line Functions

Type Style No. No.

→ Item + New Select from full list

- **Customer Name.**  
Specifies the name of the customer who will receive the products and be billed by default.
- Click on the lookup button **Customer Name**.
- Click on the link in cell **No.** on any row.

SALES QUOTE | WORK DATE: 1/18/2018

1005

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

**General**

Order Type Code ..... PRESALES ..... Contact .....

Season Code ..... 2020SS ..... Due Date .....

Brand Code ..... AWESOME ..... Requested .....

Customer Name ..... \* Size Range .....

External Document No. ....> No. 1 Name Post Code Phone No.

No. 1	Name	Post Code	Phone No.
1000	Guildford Leather Wear	GU7 5GT	
1001	The Pop and Mom Shop	CB3 7GG	
1002	Postoffice Heathrow	N16 3AZ	
1003	Airline Ltd.	M61 2YG	
1004	Select record "1003" Group	DY5 4DJ	

Lines Manage Line Functions

Type Style No. No.

→ Item + New Select from full list

- **External Document No.**  
Specifies a document number that refers to the customer's or vendor's numbering system.

SALES QUOTE | WORK DATE: 1/18/2018

1005 · Airline Ltd.

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

**General**

Order Type Code ..... PRESALES ..... Contact .....

Season Code ..... 2020SS ..... Due Date .....

Brand Code ..... AWESOME ..... Requested .....

Customer Name ..... Airline Ltd. ....

External Document No. ....

- **Contact.**  
Specifies the name of the person to contact at the customer.

Contact ..... Susan Metters ..... \*

Due Date ..... 1/18/2018 ..... \*

Requested Delivery Date ..... \*

Size Range Region Code ..... EU ..... \*

- **Due Date.**  
Specifies when the related sales invoice must be paid.

Contact ..... Susan Metters ..... \*

Due Date ..... 1/18/2018 ..... \*

Requested Delivery Date ..... \*

Size Range Region Code ..... EU ..... \*

- **Requested Delivery Date.**  
Specifies the date that the customer has asked for the order to be delivered.

Contact ..... Susan Metters ..... \*

Due Date ..... 1/18/2018 ..... \*

Requested Delivery Date ..... \*

Size Range Region Code ..... EU ..... \*

### 3.2.1.3. Sales quote lines

- Move the mouse to **Size Range Region Code**. Specifies the region code that is used to define mappings for size ranges

Contact .....	Susan Metters
Due Date .....	1/18/2018
Requested Delivery Date .....	
Size Range Region Code .....	EU

- Type.**  
Specifies the type of transaction that will be posted with the document line. If you select Comment, then you can enter any text in the Description field, such as a message to a customer.
- Style No.**  
Specifies the Style of the selected item. When you select a style number first the list of items to choose from will only show items which belong to this style.
- No.**  
Specifies the number of a general ledger account, item, resource, additional cost, or fixed asset, depending on the contents of the Type field.
- Description.**  
Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.
- Location Code.**  
Specifies the inventory location from which the items sold should be picked and where the inventory decrease is registered.
- Quantity.**  
Specifies how many units are being sold.
- 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.
- Unit Price Excl. VAT.**  
Specifies the price for one unit on the sales line.
- Unit Price Excl. VAT.**  
Specifies the price for one unit on the sales line.
- Line Discount %.**  
Specifies the discount percentage that is granted for the item on the line.

Lines	Manage	Line	Functions	Fewer options					
Type	Style No.	No.	Description	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Unit Price	Line Discount %
Item	1	2013	to print	24N	1	1	10.40	10.40	0
<div>Open report</div>									

1. **Line Amount.**  
Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.
2. **Season Code.**  
Specifies a code for the season that this quoted item belongs to.
3. **Delivery Drop Code.**  
Specifies the code that defines the drop in which this item will be delivered, associated with the season.
4. **Department Code.**  
Specifies the code for Shortcut Dimension 1, which is one of two global dimension codes that you set up in the General Ledger Setup window.
5. **Area Code.**  
Specifies the code for Shortcut Dimension 2, which is one of two global dimension codes that you set up in the General Ledger Setup window.

Line Amount	Season Code	Delivery Drop Code	Department Code	Area Code
104.00	1 02055	2	3	4

### 3.2.1.4. Make order from quote

- Click on the navigation menu item popup **Release**.
- Click on the navigation menu item **Release**.

SALES QUOTE | WORK DATE: 1/18/2018

1005 · Airline Ltd.

Process Quote Request Approval Print/Send **Release** Navigate Actions Navigate Fewer options

Release Reopen

Release the document to the next stage of processing. When a document is released, it will be included in all availability calculations from the associated receipt date of the items. You must release the document before you can make changes to it. (Ctrl+R)

- Click on the navigation menu item popup **Process**.
- Click on the navigation menu item **Make Order**.

SALES QUOTE | WORK DATE: 1/18/2018

1005 · Airline Ltd.

Process Quote Request Approval Print/Send Release Navigate Actions Navigate Fewer options

Make Order Make Invoice Copy Document...

Convert the sales quote to a sales order.

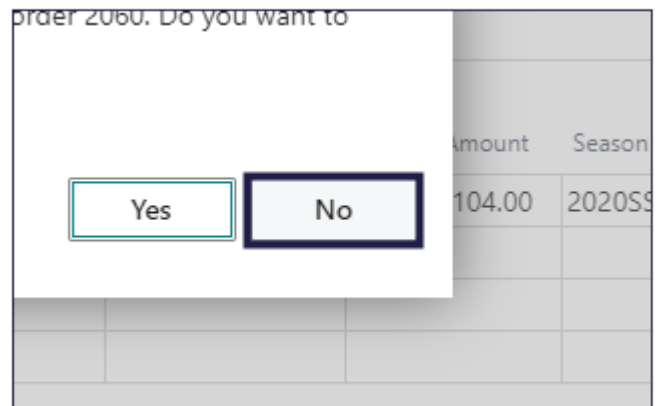
- Click on the button **Yes**.

Convert the quote to an order?

Yes No



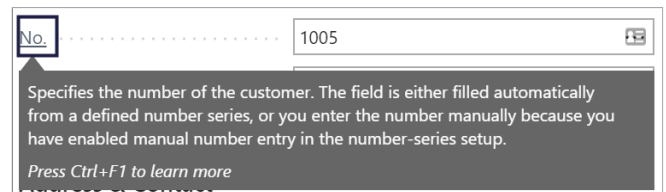
- Click on the button **No**.



### 3.2.2. Sales order creation

#### 3.2.2.1. Tooltips

- All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.



#### 3.2.2.2. Order Types

On the Order Type a season and or additional seasons can be attached.

Example:

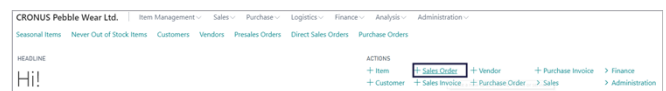
When choosing Order Type Presales the default season is filled on the Sales Order header.

- Code.**
- Description.**
- Type.**
- Default Season Code.**
- Additional Seasons.**

CODE	DESCRIPTION	TYPE	DEFAULT SEASON CODE	ADDITIONAL SEASONS
DIRECT	Direct	Direct	WOOD	(Define Filter...)
WOOD	Never Out of Stock	Direct	WOOD	(Define Filter...)
PRESALES	Presales	Presales	2020S	(Define Filter...)
LATE PRE	Late Presales	Late Presales		(Define Filter...)

#### 3.2.2.3. Create a new Sales Order

- Click on the navigation menu item **Sales Order**.



#### 3.2.2.4. General

- Move the mouse to the field **Order Type Code**.
- Click on the lookup button **Order Type Code**.

General	
Order Type Code	<input type="text" value="1"/> <input type="button" value="2"/>
Season Code	<input type="text" value=""/>
Brand Code	<input type="text" value=""/>
Customer Name	<input type="text" value=""/>
Order Date	<input type="text" value=""/>

1. Choose a code for the order type that this sales order belongs to.

CODE	DESCRIPTION
DIRECT	Direct
NOOS	Never Out of Stock
PRESALES	Presales
LATE PRE	Late Presales

1. Move the mouse to the field **Season Code**. Specifies a code for the season that this sales order belongs to.

General

Order Type Code ..... PRESALES

Season Code ..... 2020SS

Brand Code ..... \*

Customer Name ..... \*

Order Date ..... 7/25/2019

1. Move the mouse to the field **Brand Code**.
2. Click on the lookup button **Brand Code**.

General

Order Type Code ..... PRESALES

Season Code ..... 2020SS

Brand Code ..... 1

Customer Name ..... \*

Order Date ..... 7/25/2019

1. Choose a code for the brand that this sales order belongs to.

Brand Code ..... \*

Customer Name ..... \*

Order Date ..... \*

CODE DESCRIPTION

ADVENTURE Adventure Sporting Goods Ltd.

AWESOME Awesome Clothing Ltd.

NORTHWIND Northwind Outdoor Goods Ltd.

Lines Manage Line Order Fe + New Select from full list

1. Move the mouse to the field **Customer Name**.
2. Click on the lookup button **Customer Name**.

General

Order Type Code ..... PRESALES

Season Code ..... 2020SS

Brand Code ..... AWESOME

Customer Name ..... 1

Order Date ..... 7/25/2019

1. Choose the customer who will receive the products and be billed by default.

Customer Name ..... \*

Order Date ..... \*

Size Range

NO. NAME CITY POST CODE

1000 Guildford Leather Wear Guildford GU7 5GT

1001 The Pop and Mom Shop Cambridge CB3 7GG

1002 Postoffice Heathrow London N16 34Z

1003 Airline Ltd. Manchester M61 2YG

1004 A Buying Group Dudley DY5 4DJ

Lines Manage Line Order Fe + New Select from full list

1. Move the mouse to the field **Order Date**. Specifies the date when the order was created.

General

Order Type Code ..... PRESALES

Season Code ..... 2020SS

Brand Code ..... AWESOME

Customer Name ..... Guildford Leather Wear

Order Date ..... 7/25/2019

1. **Requested Delivery Date.**  
Specifies the date that the customer has asked for the order to be delivered.
2. **External Document No.**  
Specifies a document number that refers to the customer's or vendor's numbering system.
3. **Salesperson Code.**  
Specifies the name of the salesperson who is assigned to the customer.
4. **Size Range Region Code.**  
Specifies the region code that is used to define mappings for size ranges.
5. **Status.**  
Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.

Requested Delivery Date .....	<input type="text"/>	1
External Document No. ....	<input type="text"/>	2
Salesperson Code .....	AH	3
Size Range Region Code .....	EU	4
Status .....	Open	5

### 3.2.2.5.

### Sales lines

#### Type

Order Date .....		7/29/2019	
<div> <div>Lines</div> <div>Manage</div> <div>Line</div> <div>Order</div> <div>Fewer options</div> </div>			
TYPE	NO.	AUTO CANCEL REMAINDER	DESCR
<input type="text" value="Item"/>		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
Total Excl. VAT (GBP) .....			
Total VAT (GBP) .....			

Click on the lookup button in the cell **Type**

Order Date .....		7/29/2019	
<div> <div>Lines</div> <div>Manage</div> <div>Line</div> <div>Order</div> <div>Fewer options</div> </div>			
TYPE	NO.	AUTO CANCEL REMAINDER	DESCR
<input type="text" value="Item"/>		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	
Total Excl. VAT (GBP) .....			
Total VAT (GBP) .....			

Move the mouse to the cell **Option Values** with the value **Item**

Specifies the type of transaction that will be posted with the document line.

TYPE	NO.	CANCEL REMAINDER	DESCRIPTION
Item		<input type="checkbox"/>	
OPTION VALUES			
Comment			
G/L Account			
Item			
Select from full list			

Invoice Details

Currency Code .....

VAT Bus. Posting Group ..... DOMESTIC

**No.**

Order Date ..... 7/29/2019

Lines | Manage | Line | Order | Fewer options

TYPE	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

Total Excl. VAT (GBP) .....

Total VAT (GBP) .....

Click on the lookup button in the cell **No.**

Order Date ..... 7/29/2019

Lines | Manage | Line | Order | Fewer options

TYPE	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

Look up value

Total Excl. VAT (GBP) .....

Total VAT (GBP) .....

Click on the link in cell **No.** on any row  
Specifies the number of a general ledger account, item, resource, additional cost, or fixed asset, depending on the contents of the Type field.

Lines | Manage | Line | Order | Fewer options

TYPE	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item		<input type="checkbox"/>	
		<input type="checkbox"/>	
		<input type="checkbox"/>	

NO. DESCRIPTION

10001 T-shirt print

10002 T-shirt multicoloured

10010 Top uni

10013 Top print

10026 Skirt uni

Invoice Details

+ New

### Auto Cancel Remainder

Specifies if the remaining quantity will automatically be canceled when shipping less than the ordered quantity.

Order Date		7/29/2019	
<div>Lines</div> <div>Manage Line Order Fewer options</div>			
TYPE	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	10001	<input checked="" type="checkbox"/>	T-shirt print
		<input type="checkbox"/>	
		<input type="checkbox"/>	
Total Excl. VAT (GBP)			
Total VAT (GBP)			

### Description

Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.

		7/29/2019	
<div>Manage Line Order Fewer options</div>			
NO.	AUTO CANCEL REMAINDER	DESCRIPTION	UNIT OF MEASURE CODE
10001	<input checked="" type="checkbox"/>	T-shirt print	PCS
	<input type="checkbox"/>	T-shirt print	
	<input type="checkbox"/>		
T (GBP)		0.0	
3P)		0.0	

### Unit of Measure Code

Specifies the base unit used to measure the item, such as piece, box, or pallet.

7/29/2019		Status	
Fewer options			
AUTO CANCEL REMAINDER	DESCRIPTION	UNIT OF MEASURE CODE	LOCATION CODE
<input checked="" type="checkbox"/>	T-shirt print	PCS	MAIN
<input type="checkbox"/>			
<input type="checkbox"/>			
		0.00	
		0.00	Total Incl. VAT (GBP)

### Location Code


Specifies the inventory location from which the items sold should be picked and where the inventory decrease is registered.

		Status	
Fewer options			
DESCRIPTION	UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY
T-shirt print	PCS	MAIN	
		MAIN	
		0.00	
		0.00	Total Incl. VAT (GBP)

### Quantity


		Status			Open
UNIT OF MEASURE CODE		LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %
PCS	MAIN				
			0.00		
			0.00		
			Total Incl. VAT (GBP)		

Click on the lookup button in the cell **Quantity**  
Fill in the quantities in the order matrix

		Status .....		Open	
UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %	LI AMOU
PCS	MAIN				

### Quantity

Specifies how many units are being sold.

		Status .....	Open	
UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %
PCS	MAIN	12 ...	8.58	
			8.58	
			Total Incl. VAT (GBP) .....	

### Unit Price

Specifies the price for one unit on the sales line.

		Status .....		Open	
UNIT OF MEASURE CODE	LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT
PCS	MAIN	12	8.58		102.96
			8.58		
8.58		Total Incl. VAT (GBP) .....			

### Line Discount %

Specifies the discount percentage that is granted for the item on the line.

Status	Open					
LOCATION CODE	QUANTITY	UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP	
MAIN	12	8.58		102.96		
Total Incl. VAT (GBP)						

### Line Amount

Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.

	Open					
QUANTITY	UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED	
12	8.58		102.96			
			102.96			
VAT (GBP)						1

### Qty. to Ship

Specifies the quantity of items that remain to be shipped.

	Open				
UNIT PRICE	LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED	
8.58		102.96			
					10.73


### Quantity Shipped

Specifies the quantity of items that remain to be shipped.

	Open			
LINE DISCOUNT %	LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED	
	102.96			
				10.73

### Outstanding Quantity

Specifies how many units of the item on the line have been unfulfilled.

7/29/2019				Status .....	
er options					
LINE AMOUNT	QTY. TO SHIP	QUANTITY SHIPPED	OUTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED
102.96		-	12		-
8.58					
Total Incl. VAT (GBP) .....					


### Qty. to Invoice

Specifies the quantity that remains to be invoiced. It is calculated as Quantity minus Qty. Invoiced.

			Status .....		
QTY. TO SHIP	QUANTITY SHIPPED	OUTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE
	-	12		-	
		8.58		Total Incl. VAT (GBP) .....	

### Quantity Invoiced

Specifies how many units of the item on the line have been posted as invoiced.

		Status		Open	
QUANTITY SHIPPED	OUTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE
—	12		—		1/15/2020
			Open record <sup>***</sup> in a new window		
8.58		Total Incl. VAT (GBP)			

### Requested Delivery Date

Specifies the date that the customer has asked for the order to be delivered.

		Status		Open	
OUTSTANDI... QUANTITY	QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE	SEASON CODE
12		-		/15/2020	2020SS



**Shipment Date**

Specifies when items on the document are shipped or were shipped. A shipment date is usually calculated from a requested delivery date plus lead time.

Status ..... Open						
QTY. TO INVOICE	QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE	SEASON CODE	DELIVERY DROP CODE	DEI CO
	-		1/15/2020	2020SS	2	
Type the date in the format M/d/yyyy						
Total Incl. VAT (GBP) .....						

**Season Code**

Specifies a code for the season that this ordered item belongs to.

Status ..... Open						
QUANTITY INVOICED	REQUES... DELIVERY DATE	SHIPMENT DATE	SEASON CODE	DELIVERY DROP CODE	DEPARTME... CODE	A
-		1/15/2020	2020SS	2		
2020SS						
VAT (GBP) .....						

**Delivery Drop Code**

Specifies the code that defines the drop in which this item will be delivered, associated with the season.

Status ..... Open						
REQUES... DELIVERY DATE	SHIPMENT DATE	SEASON CODE	DELIVERY DROP CODE	DEPARTME... CODE	AREA C	
-	1/15/2020	2020SS	2			
10.73						

### 3.2.2.6. Invoice details

- Currency Code.**  
Specifies the currency of amounts on the sales document.
- VAT Bus. Posting Group.**  
Specifies the VAT specification of the involved customer or vendor to link transactions made for this record with the appropriate general ledger account according to the VAT posting setup.
- Payment Terms Code.**  
Specifies a formula that calculates the payment due date, payment discount date, and payment discount amount.

Invoice Details	
Currency Code .....	1
VAT Bus. Posting Group .....	DOMESTIC 2
Payment Terms Code .....	1M(8D) 3

- Department Code.**  
Specifies the code for Shortcut Dimension 1, which is one of two global dimension codes that you set

Department Code .....	4
Area Code .....	5

up in the General Ledger Setup window.

2. **Area Code.**  
Specifies the code for Shortcut Dimension 2, which is one of two global dimension codes that you set up in the General Ledger Setup window.

### 3.2.2.7. Shipping and Billing

#### 3.2.2.7.1. Shipping

1. **Ship-to.**  
Specifies the address that the products on the sales document are shipped to. Default (Sell-to Address): The same as the customer's sell-to address.  
Alternate Ship-to Address: One of the customer's alternate ship-to addresses.  
Custom Address: Any ship-to address that you specify in the fields below.
2. **Contact.**  
Specifies the name of the contact person at the address that products on the sales document will be shipped to.

Shipping and Billing	
Ship-to .....	Default (Sell-to Address) <span>1</span>
Contact .....	<span>2</span>

#### 3.2.2.7.2. Shipment method

1. **Code.**  
Specifies how items on the sales document are shipped to the customer.
2. **Agent.**  
Specifies which shipping agent is used to transport the items on the sales document to the customer.

SHIPMENT METHOD	
Code .....	EXW <span>1</span>
Agent .....	FEDEX <span>2</span>

#### 3.2.2.7.3. Billing

1. **Bill-to.**  
Specifies the customer that the sales invoice will be sent to. Default (Customer): The same as the customer on the sales invoice.  
Another Customer: Any customer that you specify in the fields below.
2. **Location Code.**  
Specifies the location from where inventory items to the customer on the sales document are to be shipped by default.
3. **Shipment Date.**  
Specifies when items on the document are shipped or were

Bill-to .....	Default (Customer) <span>1</span>
Location Code .....	MAIN <span>2</span>
Shipment Date .....	7/29/2019 <span>3</span>

shipped. A shipment date is usually calculated from a requested delivery date plus lead time.

### 3.2.3. Use Prepack in Sales Order

#### 3.2.3.1. Use Prepack in Sales Order

1. Move the mouse to the column header **Main Item No.**
2. Enter the Main Item number.
3. Click on the link in cell **No.** with the value **10023**.

1. Move the mouse to the lookup button in the cell **No.**
2. Click on the cell **Description** on any row.

Click on the link in cell **Quantity**

1. Click on the cell **Prepack Qty.** - Enter **Prepack Qty.**
2. Click on the button **Close**.

1. **Quantity.**  
Specifies how many units are being sold.
2. Move the mouse to the column header **Prepack Qty.**  
Specifies the quantity within a prepack

## 3.2.4. Use Ratio Curves in Sales Order

### 3.2.4.1. Ratio Curves in Sales order

Open Matrix to fill in **Quantity**

Click on the lookup button in the cell **Ratio Curve Code**

Choose a Ratio Curve.

## K3 Pebblestone

Add the quantity for the **Ratio Curve Quantity**, press Tab.  
The quantities will be filled based on the Ratio Curve.

Sales Document Status: Open Matrix Value: .....

Sales Lines

Code	Ratio Curve Code	Ratio Curve Quantity	Total	XXS	XS	S
NAVY	RC	1				
<b>Total</b>						

1. Click on the button **Close**.

Matrix

Sales Document Status: Open Matrix Value: Quantity

Sales Lines

Code	Ratio Curve Code	Ratio Curve Quantity	Total	XXS	XS	S	M	L	XL	XXL
NAVY	RC	10	1	2	2	2	2	2	1	
<b>Total</b>		10	1	2	2	2	2	2	1	

Close

### 3.2.5. Sales return order creation

#### 3.2.5.1. Navigate to sales return order

1. **Sales.**
2. **Return Orders.**

Dynamics 365 Business Central

K3pebblestone Cloud | Item Management | Sales | Purchase | Logistics | Finance | Analysis | Administration | ...

Presales Orders Direct Orders Presales Quotes Direct Quotes Customers Contacts Customer Price Groups Customer Discount Groups Return Orders Posted Shipments Posted Return Receipts

HEADLINE

Want to learn more about Business Central?

ACTIONS

+ Item + Sales Quote + Sales Invoice + Purchase Order + Sales + Administration  
+ Customer + Sales Order + Vendor + Purchase Invoice + Finance

#### 3.2.5.2. Create a sales return order

Create a new entry.

K3pebblestone Cloud | Item Management | Sales | Purchase | Logistics | Finance | Analysis | Administration | ...

Presales Orders Direct Orders Presales Quotes Direct Quotes Customers Contacts Customer Price Groups Customer Discount Groups Return Orders Posted Shipments Posted Return Receipts

Return Orders All Search Create a new entry

#### 3.2.5.3. General

1. **Customer No.**  
Specifies the number of the customer associated with the sales return.
2. **Customer Name** The value for this field is required.  
Specifies the name of the customer.
3. **Order Date.**  
Specifies the date when the order was created.
4. **External Document No.**  
Specifies a document number that refers to the customer's or vendor's numbering system.
5. **Status Open.**  
Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.

Sales Return Order

Process Release Posting Print/Send Return Order Actions Fewer options

General

Customer No. External Document No.  
Customer Name Date  
Order Date

### 3.2.5.4. Sales lines

1. **Type.**  
Specifies the type of transaction that will be posted with the document line. If you select Comment, then you can enter any text in the Description field, such as a message to a customer.
2. **No.**  
Specifies the number of a general ledger account, item, resource, additional cost, or fixed asset, depending on the contents of the Type field.
3. **Description.**  
Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.
4. **Return Reason Code.**  
Specifies the code explaining why the item was returned.
5. **Location Code.**  
Specifies the location from where inventory items to the customer on the sales document are to be shipped by default.
6. **Quantity.**  
Specifies how many units are being returned.
7. **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.
8. **Unit Price.**  
Specifies the price for one unit on the sales line.
9. **Line Discount %.**  
Specifies the discount percentage that is granted for the item on the line.
10. **Line Amount.**  
Specifies the net amount, excluding any invoice discount amount, that must be paid for products on the line.
11. **Return Qty. to Receive.**  
Specifies the quantity of items that remain to be shipped.



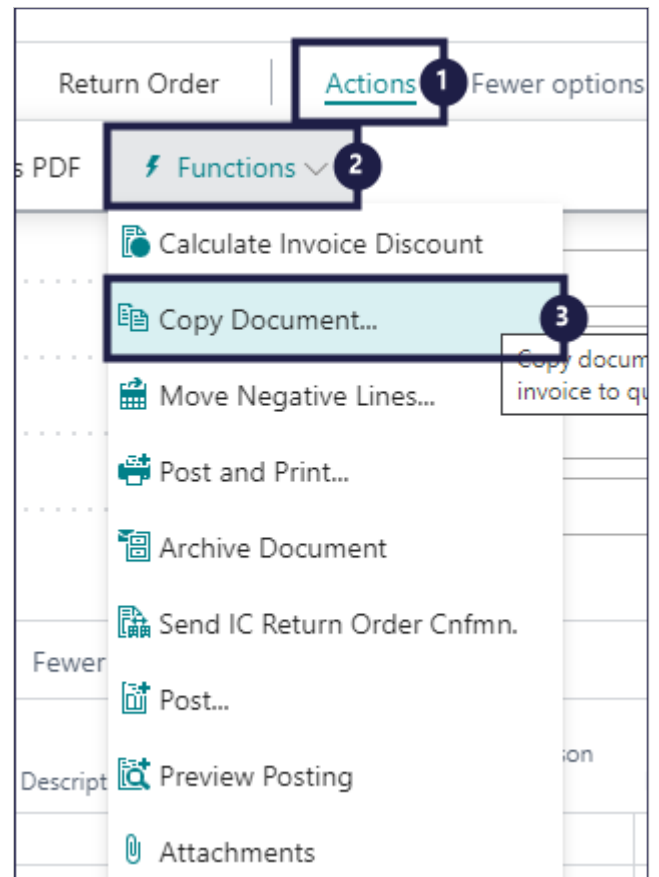
1. **Return Qty. Received.**  
Specifies how many units of the item on the line have been posted as shipped.
2. **Outstanding Quantity.**  
Specifies how many units of the item on the line have been unfulfilled.
3. **Qty. to Invoice.**  
Specifies the quantity that remains to



- be invoiced. It is calculated as  
Quantity - Qty. Invoiced.
4. **Quantity Invoiced.**  
Specifies how many units of the item  
on the line have been posted as  
invoiced.

### 3.2.5.4.1. Copy document

1. **Actions.**
2. **Functions.**
3. **Copy document lines and header information from another sales document to this document. You can copy a posted sales invoice into a new sales invoice to quickly create a similar document.**



1. **Document Type.**  
Specifies the type of document that is processed by the report or batch job.
2. Click on an option from the list.

COPY SALES DOCUMENT

Options

Document Type ..... Quote **1**

Document No. .... \*

Doc. No. Occurrence .....

Version No. ....

Sell-to Customer No. ....

Sell-to Customer Name .....

Include Header .....

Recalculate Lines .....

Quote

Blanket Order

Order

Invoice

Return Order

Credit Memo

Posted Shipment

**Posted Invoice** **2**

Posted Return Receipt

Posted Credit Memo

Arch. Quote

Arch. Order

Arch. Blanket Order

Arch. Return Order

Location Code

Quantity

**Document No.**

Specifies the number of the document that is processed by the report or batch job.

MENT

Posted Invoice

\*

Look up value

MD

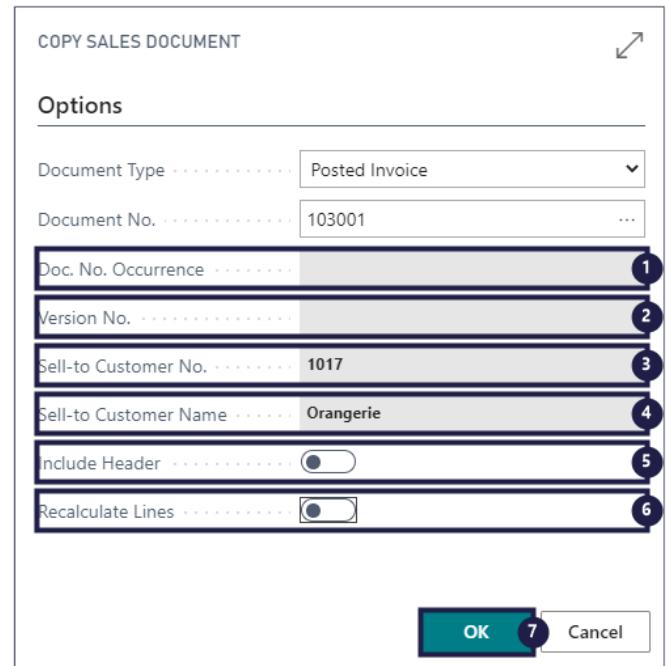
1. Click on an option from the list.
2. Click on the button **OK**.

No.	Customer No.	Customer Name	Currency Code	Due Date	Amount	Amount including VAT
103003	1020	Het Nieuwe Mode bedrijf		30/06/2020	139.00	139.00
103002	1020	Het Nieuwe Mode bedrijf		30/06/2020	81.00	81.00
→ 103001	1017	Orangerie		30/06/2020	97.20	97.20

OK **2** Cancel

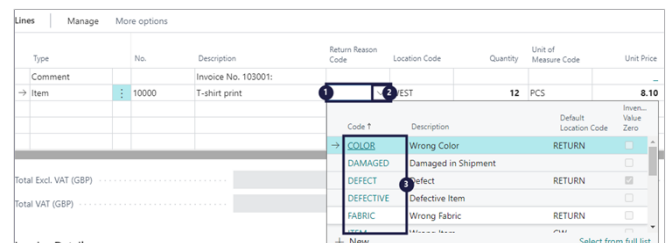


1. **Doc. No. Occurrence (Blank).**  
Specifies the number of times the No. value has been used in the number series.
2. **Version No. (Blank).**  
Specifies the version of the document to be copied.
3. **Sell-to Customer No. 1017.**  
Specifies the sell-to customer number that will appear on the new sales document.
4. **Sell-to Customer Name Orangerie.**  
Specifies the sell-to customer name that will appear on the new sales document.
5. **Include Header.**  
Specifies if you also want to copy the information from the document header. When you copy quotes, if the posting date field of the new document is empty, the work date is used as the posting date of the new document.
6. **Recalculate Lines.**  
Specifies that lines are recalculate and inserted on the sales document you are creating. The batch job retains the item numbers and item quantities but recalculates the amounts on the lines based on the customer information on the new document header. In this way, the batch job accounts for item prices and discounts that are specifically linked to the customer on the new header.
7. Click on the button **OK**.



### 3.2.5.5. Return reason code

1. **Return Reason Code.**
2. Click on the lookup button in the cell **Return Reason Code**.
3. Move the mouse to the cell **Code** on any row.



### 3.2.5.6. Invoicing details

1. **Currency Code.**  
Specifies the currency that is used on the entry.
2. **Payment Terms Code.**  
Specifies a formula that calculates the payment due date, payment discount date, and payment discount amount.
3. **Shipment Date.**  
Specifies when items on the



180/278

### 3.2.6. Consignment order

#### 3.2.6.1. Consignment order

Click on the navigation menu item **Sales Order**

The screenshot shows the navigation menu with the following items: Finance, Analysis, Administration, and a list of menu items: Direct Sales Orders, Presales Quotes, Direct Sales Quotes, and Purchase Orders. The 'Sales Order' link is highlighted with a red box.

#### Consignment

Indicates if the order is a consignment order. Consignment orders offer additional functionality for consignment scenario's.

The screenshot shows the 'Sales Order' form with the following fields: Consignment (toggle), Order Type Code (lookup), Season Code (lookup), Brand Code (lookup), and Customer Name (lookup). The 'Consignment' toggle is highlighted with a red box.

1. Click on the lookup button **Order Type Code**.

The screenshot shows the 'Sales Order' form with the following fields: Consignment (toggle), Order Type Code (lookup), Season Code (lookup), Brand Code (lookup), Customer Name (lookup), and Order Date (calendar). The 'Order Type Code' lookup button is highlighted with a red box.

Click on the link in cell **Code** on any row

The screenshot shows the 'ORDER TYPES' table with the following columns: Code, Description, Type, and Default Season Code. The 'Code' column is highlighted with a red box.

Code	Description	Type	Default Season Code
DIRECT	Direct	Direct	2020FW
NOOS	Never Out of Stock	Direct	NOOS
PRESALES	Presales	Presales	2021SS
LATE PRE	Late Presales	Late Presales	2021SS

1. Click on the lookup button **Customer Name**.

The screenshot shows the 'Sales Order' form with the following fields: Consignment (toggle), Order Type Code (lookup), Season Code (lookup), Brand Code (lookup), Customer Name (lookup), and Order Date (calendar). The 'Customer Name' lookup button is highlighted with a red box.

Click on the link in cell **No.** on any row  
If a customer has multiple ship to addresses, a pop-up appears.

CUSTOMERS				
No. ↑	Name	Responsibility Center	Location Code	Post Code
1044	New Concepts Fashion	EAST	US-GA 3177	
1045	Omni Consumer Products	EAST	US-IL 61236	
1046	Metatorad Malaysia Sdn Bhd	EAST	MY-47400	
1047	Gadgetron Accessories	EAST	MY-57000	
1048	TraxTonic Sdn Bhd	EAST	MY-93450	
1049	Somadis	EAST	MO-10100	

Click on the link in cell **Code** on any row

SHIP-TO ADDRESS LIST - 1068 - JAMES DAILEY SPORTSWEAR LTD.		
Code ↑	Name	City
→ COVENTRY	James Dailey Sportswear Ltd.	Coventry
LIVERPOOL	James Dailey Sportswear Ltd.	Liverpool
LONDON	James Dailey Sportswear Ltd.	London
MANCHESTER	James Dailey Sportswear Ltd.	Manchest

### 3.2.6.1.1.

### Manually quantity for Transfer order

**Qty. to Ship**, needs to be filled manually, before creating the transfer order.

Discount %	Line Amount	Qty. on Transfer Order	Qty. to Ship	Quantity Shipped	Outstanding Quantity
2	105.84	0	12	—	
12		Total VAT (GBP)			

### 3.2.6.1.2.

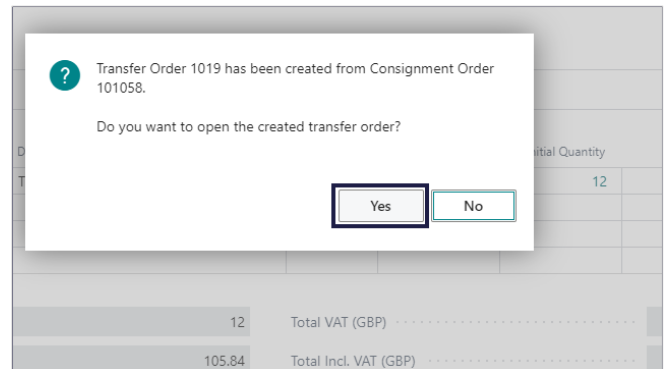
### Create consignment transfer order

Click on the navigation menu item popup **Release**

SALES ORDER   WORK DATE: 6/2/2020	
101058 · James Dailey Sportswear Ltd. · MANCHES	
Process	Release Posting Prepare Order Print/Send Navigate Actions
General	
Consignment	<input checked="" type="checkbox"/>
Order Type Code	PRESALES
Season Code	2021SS
Brand Code	
Customer Name	James Dailey Sportswear Ltd.

[illegible]

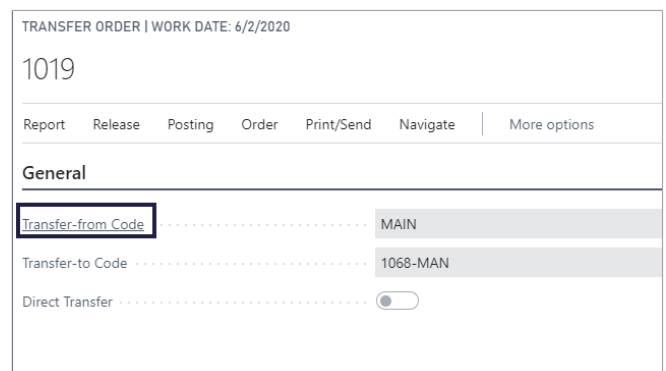
Click on the button **Yes**



### 3.2.6.2. Transfer order

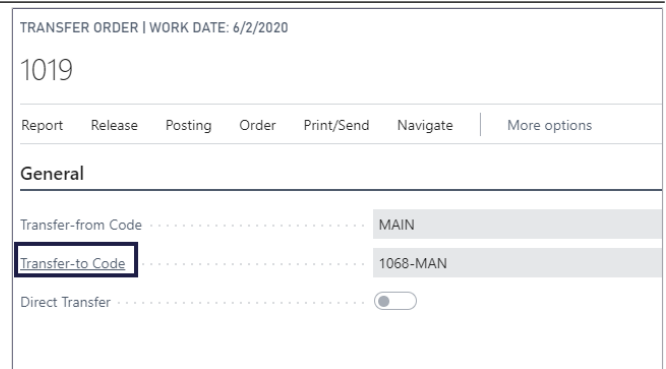
#### Transfer-from Code

Specifies the code of the location that items are transferred from.



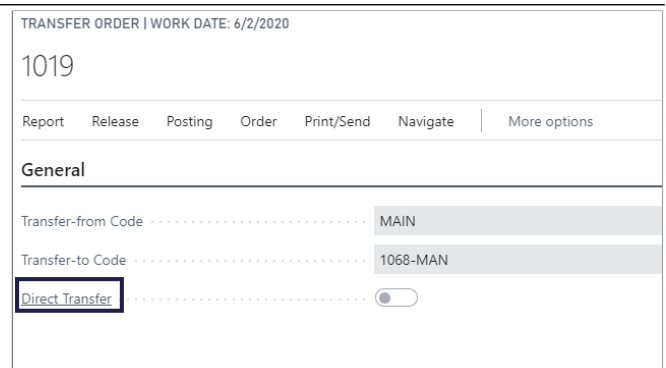
#### Transfer-to Code

Specifies the code of the location that the items are transferred to.



#### Direct Transfer

Specifies that the transfer does not use an in-transit location. When you transfer directly, the Qty. to Receive field will be locked with the same value as the quantity to ship.



**In-Transit Code**

Specifies the in-transit code for the transfer order, such as a shipping agent.

+

In-Transit Code

OWN LOG.

Posting Date

6/2/2020

Status

Released

**Posting Date**

Specifies the posting date of the transfer order.

ions

In-Transit Code

OWN LOG.

Posting Date

6/2/2020

Status

Released

Posting Date

Specifies the posting date of the transfer order.

Learn more

**Status**

Specifies whether the transfer order is open or has been released for warehouse handling.

In-Transit Code

OWN LOG.

Posting Date

6/2/2020

Status

Released

**Delivery Priority Code**

Specifies the code that defines the Delivery Priority of this location. The delivery priority is used as a sorting sequence when allocating available stock to transfer orders.

Shipment

Shipment Date

6/2/2020

Delivery Priority Code

PRI0 3

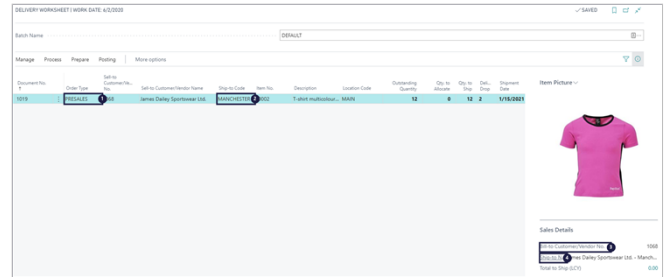
Outbound Whse. Handling Time

Shipment Method Code

Transfer-from >

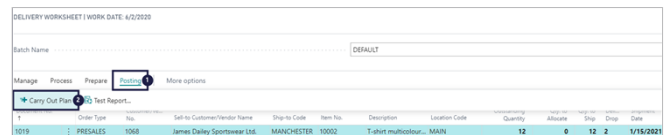
### 3.2.6.3. Transfer order in the Delivery worksheet

1. **Order Type.**  
Specifies a code for the order type that this order belongs to.
2. **Ship-to Code.**  
Specifies the Ship-to Code for the order line.
3. **Bill-to Customer/Vendor No.**  
Specifies the number of the customer (sales order) or vendor (purchase return order) that you send the invoice to.
4. **Ship-to Name.**  
Specifies the name of the customer (sales order) or vendor (purchase return order) that you deliver the items to.

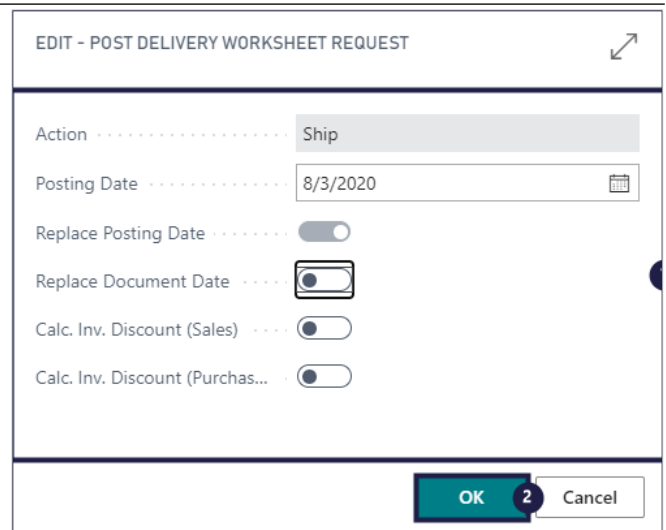


#### 3.2.6.3.1. Create Inventory pick for Transfer order in Delivery worksheet.

1. **Posting.**
2. **Carry Out Plan.**

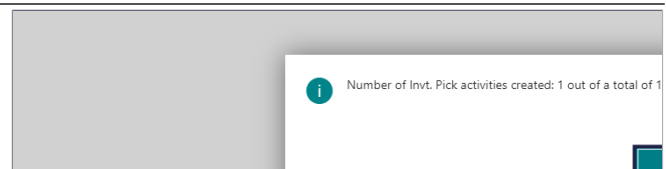


1. Fill in or enable the necessary fields - Enter **Date**.
2. Click on the button **OK**.



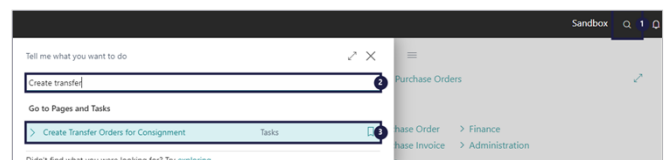
Inventory pick is created.

1. Click on the button **OK**.



### 3.2.7. Create transfer order for consignment

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.**
2. Move the mouse to the field **Type to start search:** - Enter **Create**

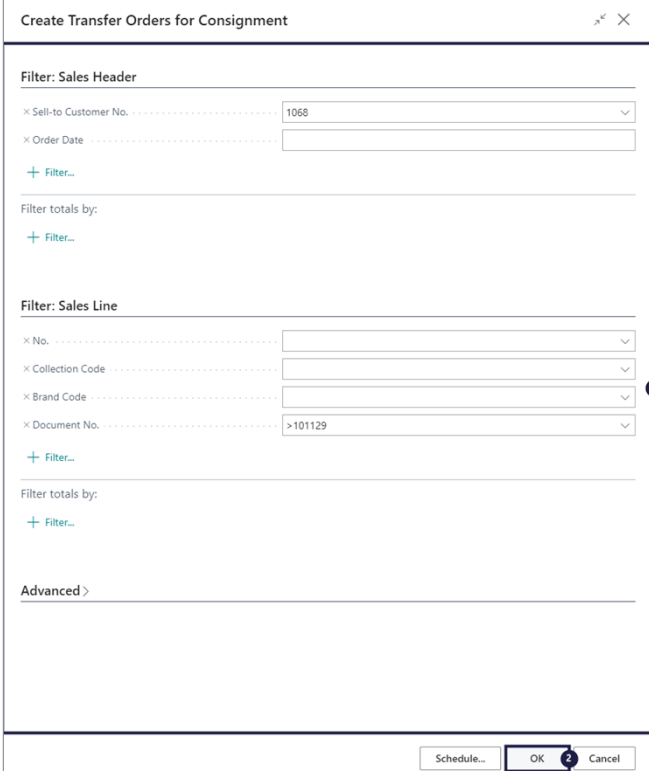




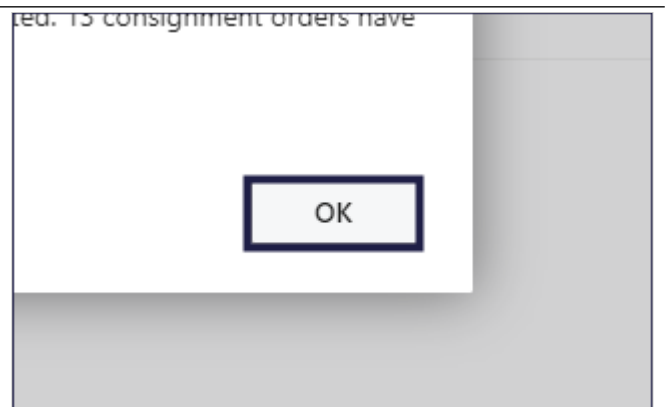
**transfer.**

3. Click on **Create Transfer Orders for Consignment Tasks** .

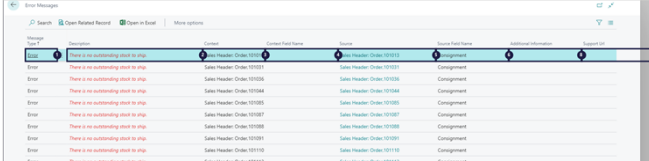
1. Set the filters for which you want to create transfer orders.
2. Click on the button **OK**.



1. Click on the button **OK**.



1. **Message Type.**  
Specifies if the message is an error, a warning, or information.
2. **Description.**  
Specifies the message.
3. **Context.**  
Specifies the context record.
4. **Context Field Name.**  
Specifies the field where the error occurred.
5. **Source.**  
Specifies the record source of the error.
6. **Source Field Name.**  
Specifies the field where the error occurred.



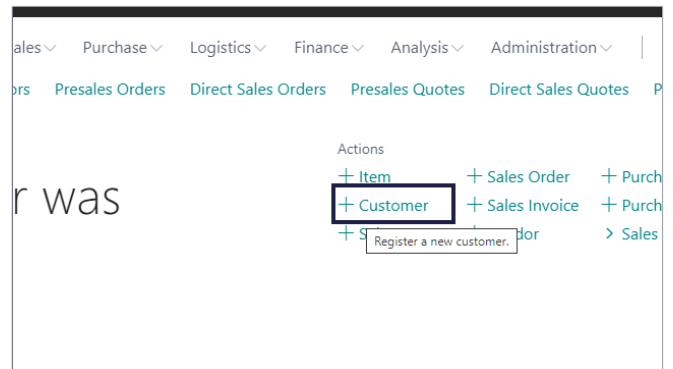
Message Type	Description	Context	Context Field Name	Source	Source Field Name
Error	There is no outstanding stock in ship	Sales Header: Order 101025	Consignment	Sales Header: Order 101025	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101026	Consignment	Sales Header: Order 101026	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101028	Consignment	Sales Header: Order 101028	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101029	Consignment	Sales Header: Order 101029	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101030	Consignment	Sales Header: Order 101030	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101031	Consignment	Sales Header: Order 101031	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101032	Consignment	Sales Header: Order 101032	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101033	Consignment	Sales Header: Order 101033	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101034	Consignment	Sales Header: Order 101034	Consignment
Error	There is no outstanding stock in ship	Sales Header: Order 101035	Consignment	Sales Header: Order 101035	Consignment

7. **Additional Information.**  
Specifies more information than the information shown in the Description field.
8. **Support Url.**  
Specifies the URL of an external web site that offers additional support.

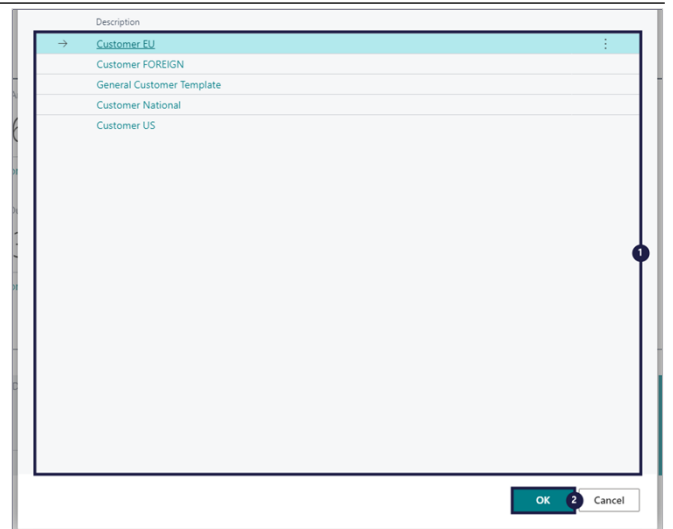
## 3.2.8. Customer creation

### 3.2.8.1. Create a new customer

Click on the link **Register a new customer.**



1. Choose which template you want to use for creating a new Customer.
2. Click on the button **OK.**



### 3.2.8.2. General

General

1. **No.**  
Specifies the number of the customer. The field is either filled automatically from a defined number serie, or you enter the number manually.
2. **Name .**  
Fill in the Customers name.
3. **Balance (LCY).**  
Specifies the payment amount that the customer owes for completed sales. This value is also known as the customer's balance.
4. **Balance Due (LCY).**

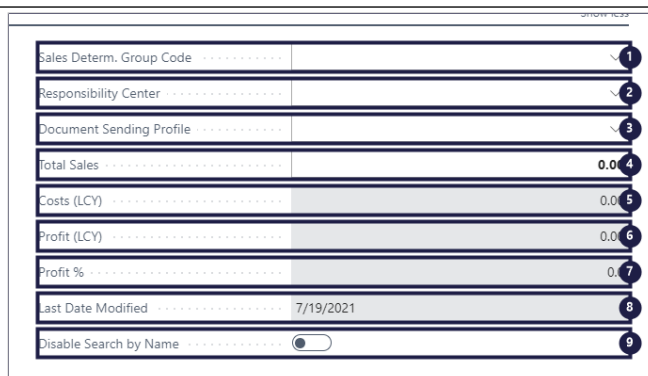


### K3 Pebblestone

- Specifies payments from the customer that are overdue per today's date.
5. **Credit Limit.**  
Specifies the maximum amount you allow the customer to exceed the payment balance before warnings are issued.
  6. **Blocked.**  
Specifies which transactions with the customer that cannot be processed, for example, because the customer is insolvent.
  7. **Privacy Blocked.**  
Specifies whether to limit access to data for the data subject during daily operations. This is useful, for example, when protecting data from changes while it is under privacy review.
  8. **Salesperson Code.**  
Specifies a code for the salesperson who normally handles this customer's account.
  9. **Sales Manager Code.**  
Specifies a code for the sales manager who normally handles this customer's account.

#### General

1. **Sales Determination Group Code.**  
Specifies to which sales determination group the customer belongs.
2. **Responsibility Center.**  
Specifies the code for the responsibility center that will administer this customer by default.
3. **Document Sending Profile.**  
Specifies the preferred method of sending documents to this customer, so that you do not have to select a sending option every time that you post and send a document to the customer. Sales documents to this customer will be sent using the specified sending profile and will override the default document sending profile.
4. **Total Sales.**  
Specifies your total sales turnover with the customer in the current fiscal year. It is calculated from amounts excluding VAT on all completed and open invoices and credit memos.
5. **Costs (LCY) .**  
Specifies how much cost you have incurred from the customer in the current fiscal year.
6. **Profit (LCY) .**



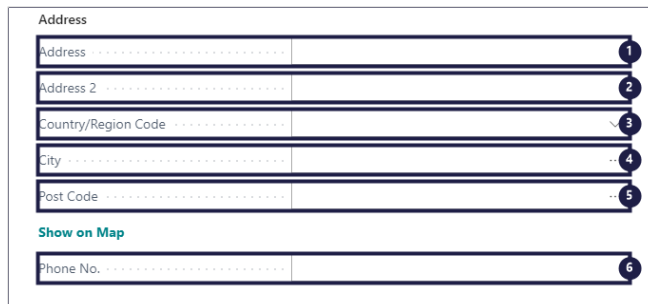
Sales Determ. Group Code		1
Responsibility Center		2
Document Sending Profile		3
Total Sales	0.0	4
Costs (LCY)	0.0	5
Profit (LCY)	0.0	6
Profit %	0.	7
Last Date Modified	7/19/2021	8
Disable Search by Name	<input type="checkbox"/>	9

7. **Profit % .**  
Specifies how much profit you have made from the customer in the current fiscal year.
8. **Last Date Modified.**  
Specifies when the customer card was last modified.
9. **Disable Search by Name.**  
Specifies that you can change customer name in the document, because the name is not used in search.

### 3.2.8.3. Address & Contact

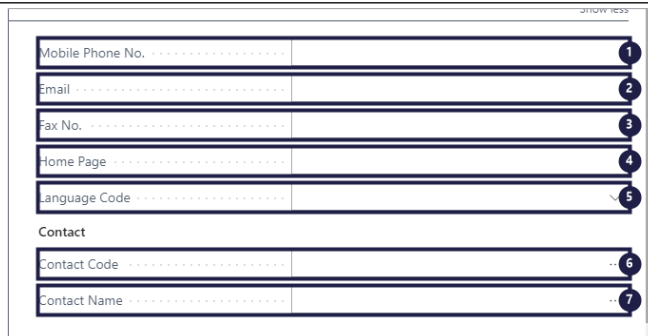
#### Address

1. **Address.**  
Specifies the customer's address. This address will appear on all sales documents for the customer.
2. **Address 2.**  
Specifies additional address information.
3. **Country/Region Code.**  
Specifies the country/region of the address.
4. **City.**  
Specifies the customer's city.
5. **Post Code.**  
Specifies the postal code.
6. **Phone No.**  
Specifies the customer's telephone number.



#### Contact

1. **Mobile Phone No.**  
Specifies the customer's mobile telephone number.
2. **Email.**  
Specifies the customer's email address.
3. **Fax No.**  
Specifies the customer's fax number.
4. **Home Page.**  
Specifies the customer's home page address.
5. **Language Code.**  
Specifies the language to be used on printouts for this customer.
6. **Contact Code.**  
Specifies the contact number for the customer.
7. **Contact Name.**  
Specifies the name of the person you



regularly contact when you do  
business with this customer.

### 3.2.8.4. Invoicing

#### Invoicing

1. **Bill-to Customer.**  
Specifies a different customer who will be invoiced for products that you sell to the customer in the Name field on the customer card.
2. **VAT Registration No.**  
Specifies the customer's VAT registration number for customers in EU countries/regions.
3. **GLN.**  
Specifies the customer in connection with electronic document sending.
4. **Use GLN in Electronic Documents.**  
Specifies whether the GLN is used in electronic documents as a party identification number.
5. **Copy Sell-to Addr. to Qte From Company.**  
Specifies which customer address is inserted on sales quotes that you create for the customer.

Bill-to Customer	1
VAT Registration No.	2
GLN	3
Use GLN in Electronic Documents	4
Copy Sell-to Addr. to Qte From Company	5

Posting Details

#### Posting details

1. **Gen. Bus. Posting Group EU.**  
Specifies the customer's trade type to link transactions made for this customer with the appropriate general ledger account according to the general posting setup.
2. **VAT Bus. Posting Group EU.**  
Specifies the customer's VAT specification to link transactions made for this customer to.
3. **Customer Posting Group EU.**  
Specifies the customer's market type to link business transactions to.

Gen. Bus. Posting Group EU	1
VAT Bus. Posting Group EU	2
Customer Posting Group EU	3

#### Prices and Discounts

1. **Currency Code.**  
Specifies the default currency for the customer.
2. **Customer Price Group EU.**  
Specifies the customer price group code, which you can use to set up special sales prices in the Sales Prices window.
3. **Customer Disc. Group.**  
Specifies the customer discount group code, which you can use as a criterion to set up special discounts in the Sales Line Discounts window.
4. **Allow Line Disc.**  
Specifies if a sales line discount is

Currency Code	1
Customer Price Group EU	2
Customer Disc. Group	3
Allow Line Disc.	4
Invoice Disc. Code C00010	5
Prices Including VAT	6

calculated when a special sales price is offered according to setup in the Sales Prices window.

5. **Invoice Disc. Code C00010.**  
Specifies a code for the invoice discount terms that you have defined for the customer.
6. **Prices Including VAT.**  
Specifies if the Unit Price and Line Amount fields on document lines should be shown with or without VAT.

### 3.2.8.5. Payments

#### Payments

1. **Application Method Manual.**  
Specifies how to apply payments to entries for this customer.
2. **Partner Type.**  
Specifies for direct debit collections if the customer that the payment is collected from is a person or a company.
3. **Payment Terms Code.**  
Specifies a code that indicates the payment terms that you require of the customer.
4. **Payment Method Code.**  
Specifies how the customer usually submits payment, such as bank transfer or check.
5. **Reminder Terms Code.**  
Specifies how reminders about late payments are handled for this customer.
6. **Fin. Charge Terms Code.**  
Specifies finance charges are calculated for the customer.
7. **Cash Flow Payment Terms Code.**  
Specifies a payment term that will be used to calculate cash flow for the customer.
8. **Print Statements.**  
Specifies whether to include this customer when you print the Statement report.
9. **Last Statement No.**  
Specifies the number of the last statement that was printed for this customer.
10. **Block Payment Tolerance.**  
Specifies that the customer is not allowed a payment tolerance.
11. **Preferred Bank Account Code.**  
Specifies the customer's bank account that will be used by default when you process refunds to the customer and direct debit collections.
12. **Special Payment Conditions.**

Application Method	Manual	1	Cash Flow Payment Terms Code	CM	1
Partner Type		2	Print Statements	<input checked="" type="checkbox"/>	2
Payment Terms Code	CM	3	Last Statement No.		3
Payment Method Code	ACCOUNT	4	Block Payment Tolerance	<input type="checkbox"/>	4
Reminder Terms Code	FOREIGN	5	Preferred Bank Account Code		5
Fin. Charge Terms Code	330 FOR	6	Special Payment Conditions	Create New...	6

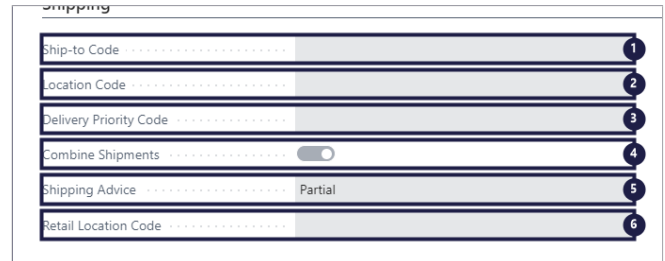
Specifies special payment conditions for customers.

### 3.2.8.6.

### Shipping

#### Shipping

1. **Ship-to Code.**  
Specifies the code for another shipment address than the customer's own address, which is entered by default.
2. **Location Code.**  
Specifies from which location sales to this customer will be processed by default.
3. **Delivery Priority Code.**  
Specifies the code that defines the Delivery Priority of this customer. The delivery priority is used as a sorting sequence when allocating available stock to sales orders.
4. **Combine Shipments.**  
Specifies if several orders delivered to the customer can appear on the same sales invoice.
5. **Shipping Advice Partial.**  
Specifies if the customer accepts partial shipment of orders.
6. **Retail Location Code.**  
Specifies which location code has been created to track and register the stock levels for the goods that are delivered and sold in the customer's location (typically a store). The location is considered to be owned by the customer, but the stock levels are tracked for consignment scenarios or replenishment as a service or Vendor Managed Inventories.

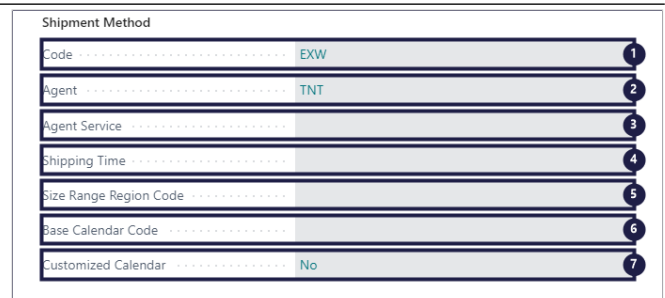


The screenshot shows a 'Shipping' configuration form with the following fields and values:

Field	Value	Order
Ship-to Code		1
Location Code		2
Delivery Priority Code		3
Combine Shipments	<input type="checkbox"/>	4
Shipping Advice	Partial	5
Retail Location Code		6

#### Shipment Method

1. **Code.**  
Specifies which shipment method to use when you ship items to the customer.
2. **Agent.**  
Specifies which shipping company is used when you ship items to the customer.
3. **Agent Service.**  
Specifies the code for the shipping agent service to use for this customer.
4. **Shipping Time.**  
Specifies how long it takes from when the items are shipped from the warehouse to when they are delivered.



The screenshot shows a 'Shipment Method' configuration form with the following fields and values:

Field	Value	Order
Code	EXW	1
Agent	TNT	2
Agent Service		3
Shipping Time		4
Size Range Region Code		5
Base Calendar Code		6
Customized Calendar	No	7

5. **Size Range Region Code.**  
Specifies the region code that is used to define mappings for size ranges.
6. **Base Calendar Code.**  
Specifies a customizable calendar for shipment planning that holds the customer's working days and holidays.
7. **Customized Calendar.**  
Specifies that you have set up a customized version of a base calendar.

### 3.2.9. Order Type pricing

#### 3.2.9.1. Navigate to Order Type pricing

1. Click on the navigation menu item **Customers**.

K3pebblestone Cloud	Item Management	Sales	Purchase	Logistics	Finance	Analysis	Administration
Seasonal Items	Never Out of Stock Items	Customers	Vendors	Presales Orders	Direct Sales Orders	Purchase Orders	

1. Move the mouse to the cell **No.** on any row.  
Choose the customer you want to set de Order Type pricing for.
2. Click on the link in cell **No.** with the value **1000**.

NO.	NAME
1000	Guildford Leather Wear
1001	The Pop and Mom Shop
1002	Postoffice Heathrow
1003	Airline Ltd.
1004	A Buying Group
1005	Wilger Young Fashion
1006	Melanie's Shoe Shop
1007	Britney's Fashion
1008	Basin Corporate Wear
1009	Candoxy Headquarters
1010	CRONUS Pebble Wear Awesome
1011	CRONUS Pebble Wear Northwind
1012	CRONUS Pebble Wear Adventure
1013	Grand Hotel
1014	Fashion store Van der Gilde
1015	Dutch Sporting Goods
1016	KLM Facility Services
1017	Orangerie
1018	All Copy
1019	Prestige
1020	Het Nieuwe Mode bedrijf
1021	Candoxy Nederland BV
1022	Francematic Manière



1. Click on the navigation menu item popup **Navigate**.
2. Click on the link **Prices and Discounts**.
3. Click on the navigation menu item **Price Group Setup**.

### 3.2.9.2. Set-up a different price group per Order Type

1. **Order Type Code.**
2. Click on the lookup button in the cell **Order Type Code**.
3. Click on the cell **Code** on any row. Choose the order type for which you want to setup special discounts.

1. **Customer Price Group.**
2. Click on the lookup button in the cell **Customer Price Group**.
3. Click on the cell **Code** on any row. Choose the customer price group code for this order type.

### 3.2.10. Inventory and price list

#### 3.2.10.1. Navigate to Inventory and Price list

1. Click on the navigation menu item popup **Item Management**.
2. Click on the navigation menu item **All Items**.

1. Click on the link **Inventory**.
2. Click on the navigation menu item **Inventory and Price List**.

- **Calculate Availability.**  
Specifies the kind of availability you want to show on the report
- Click on the field **Calculate Availability**.
- Click on an option from the list.

- **Print per Location.**  
Specifies if you want to group the items per

location

Options

Calculate Availability ..... Inventory

Print per Location ..... ☐

- **Include Items Not on Inventory.**  
Indicates whether you want to show items that are not available

Options

Calculate Availability ..... Inventory

Print per Location ..... ☐

Include Items Not on Inventory ..... ☐

- **Show Pictures.**  
Indicates whether you want to show a picture for each color, each item, or no pictures at all
- Click on the field **Show Pictures.**
- Click on an option from the list.

Options

Calculate Availability ..... Inventory

Print per Location ..... ☐

Include Items Not on Inventory ..... ☐

Show Pictures ..... Item

Date ..... Color

Sales Type ..... Item

Sales Code ..... No Pictures

- **Date.**  
Specifies the calendar date when the sales price and recommended retail price agreements ends

Options

Calculate Availability ..... Inventory

Print per Location ..... ☐

Include Items Not on Inventory ..... ☐

Show Pictures ..... Color

Date ..... 1/18/2018

- **Sales Type.**  
Specifies the sales price type, which defines whether the sales price is for an individual, group, all customers, or a campaign
- Click on the field **Sales Type.**
- Click on an option from the list.

Options

Calculate Availability ..... Inventory

Print per Location ..... ☐

Include Items Not on Inventory ..... ☐

Show Pictures ..... Color

Date ..... 1/18/2018

Sales Type ..... All Customers

Sales Code ..... Customer

Currency Code ..... Customer Price Group

Filter Item ..... All Customers

- **Sales Code.**  
Specifies the code that belongs to the Sales Type

Date ..... 1/18/2018

Sales Type ..... All Customers

Sales Code .....

Currency Code .....

- **Currency Code.**  
Specifies the code for the currency of the sales prices and recommended retail prices
- Click on the lookup button **Currency Code.**
- Move the mouse to the cell **Code** on any row.

Currency Code .....

Filter: Item

Code ↑

Description

→ AED United Arab Emirates dirham

AUD Australian dollar

BGN Bulgarian leva

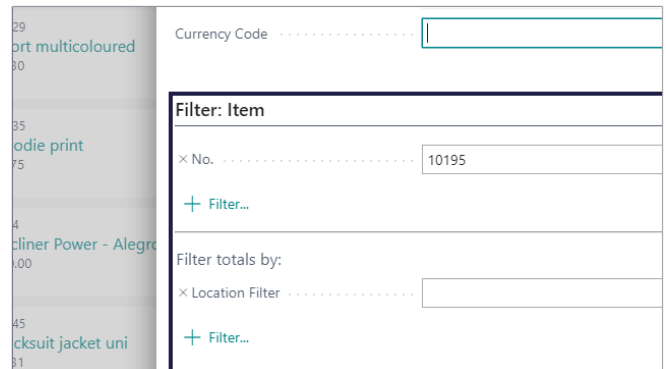
BND Brunei Darussaleam dollar

BRL Brazilian real

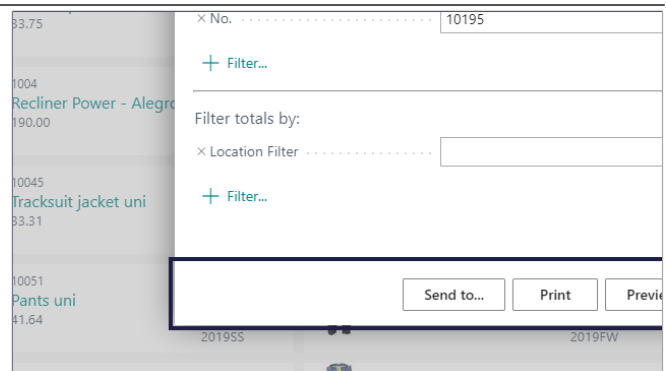
Filter totals by: + New

Select from full list

Choose the filters



Make a choice **Send to...** **Print Preview** **Cancel**



This is the outcome of the inventory and price list

Business Central				
<b>Item Availability</b>				
K3pebblestone Demo				
All Customers				
<b>10195</b>	<b>Tracksuit jacket multicol</b>			<b>34</b>
Unit Price		21.86		
Recommended Retail Price		69.95		

## 3.2.11. Comment lines

### 3.2.11.1. Attach comment line

Comment lines on sales and purchase documents can relate to an ordered item, resource, or g/l account line (VAS, instructions for the vendor or explanation for the customer).

1. Click on the row menu button.
2. Click on the menu item **Attach/Detach Comment**.

Lines	Manage	Line	Order	Fewer options			
Type	No.	Delivery Priority Code	Purchasing Code	Variant Code	Description	Location Code	Quantity
Item	10007	PRI0 3		*	T-shirt polo uni	MAIN	12
→ Comment					Please put in a red box		...
Functions					Label the box BLUE		...
Attach/Detach Comment	10009	PRI0 3		*	T-shirt polo print	MAIN	20
Manage					Pack in separate box		...
New Line					Thank you for the order		...
Delete Line							...
Select More							...

1. Click on the row menu button.
2. Click on the menu item **Attach/Detach Comment**.

Lines	Manage	Line	Order	Fewer options			
Type	No.	Delivery Priority Code	Purchasing Code	Variant Code	Description	Location Code	Quantity
Item	10007	PRI0 3		*	T-shirt polo uni	MAIN	12
→ Comment					Please put in a red box		...
Functions					Label the box BLUE		...
Attach/Detach Comment	10009	PRI0 3		*	T-shirt polo print	MAIN	20
Manage					Pack in separate box		...
New Line					Thank you for the order		...
Delete Line							...
Select More							...

1. Click on the row menu button.
2. Click on the menu item **Attach/Detach Comment**.

Lines	Manage	Line	Order	Fewer options			
Type	No.	Delivery Priority Code	Purchasing Code	Variant Code	Description	Location Code	Quantity
Item	10007	PRI0 3			T-shirt polo uni	MAIN	12
Comment					Please put in a red box		
Comment					Label the box BLUE		
Item	10009	PRI0 3			T-shirt polo print	MAIN	20
Comment					Pack in separate box		
Comment					Thank you for the order		
Functions							
Attach/Detach Comment							
Manage							
New Line							
Delete Line							
Select More							
						32	Total VAT (GBP)
						496.21	Total Incl. VAT (GBP)

### 3.2.11.2.

### Comment line on orderconfirmation

1. Click on the navigation menu item popup **Print/Send**.
2. Click on the link **Print a sales order confirmation**.

SALES ORDER | WORK DATE: 6/2/2020

101056 · James Dailey Sportswear Ltd. · MANCHESTER

Process Release Posting Prepare Order **Print/Send** 1 Navigate Actions Navigate Fewer options

Pro Forma Invoice... Email Confirmation... **Print Confirmation...** 2 Print Labels Attach as PDF...  
Print a sales order confirmation.

1. Click on the button **Preview**.

**Print Settings**

Selected printer: (Browser)

**Saved Settings**

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

**Options**

No. of Copies 0

Show Internal Information ☐

Archive Document ☐

Log Interaction ☐

Show Assembly Components ☐

**Filter: Sales Order**

× No. 101056

× Bill-to Customer No. 1068

× Sell-to Customer No.

× No. Printed

+ Filter...

Filter totals by:

+ Filter...

Send to... Print **Preview** Cancel

### 3.2.11.3. Comment line from special order to purchase order

#### Purchasing Code

Attached comments to a special order line are copied to the purchase document.

Lines	Manage	Line	Order	Fewer options		
Type	No.	Delivery Priority Code	Purchasing Code	Variant Code	Descrip	
Item	10007	PRI0 3	SPEC ORDER		T-shirt	
Comment					Plea	
Comment					Labe	
→ Item	10009	PRI0 3	SPEC ORDER	*	T-shirt	
Comment					Pack	
Comment					Thank	

- Purchase order.

#### 65 Business Central

PURCHASE ORDER | WORK DATE: 6/2/2020

106023 · Wong Lee

- Click on the navigation menu item popup **Print/Send**.
- Click on the link **Prepare to print the document**. The report request window for the document opens where you can specify what to include on the print-out.

PURCHASE ORDER | WORK DATE: 6/2/2020

106023 · Wong Lee

Process Release Posting Prepare Order **Print/Send** Navigate More options

Print Send... Attach as PDF Print Labels

Prepare to print the document. The report request window for the document opens where you can specify what to include on the print-out.

1. Click on the button **Preview**.

Print Settings

Selected printer:

(Browser)

Saved Settings

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from:

Last used options and filters

Options

No. of Copies

0

Show Internal Information

Archive Document

Log Interaction

Filter: Purchase Order

× Document Type

Order

× No.

106023

× Buy-from Vendor No.

121

× No. Printed

+ Filter...

Filter totals by:

+ Filter...

Send to...

Print

Preview

Cancel

## 3.2.12. Initial quantity sales order

### 3.2.12.1. Activate initial quantity

1. **Status Open.**  
Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.

SALES ORDER WORK DATE: 6/10/2020

101066 - Wilger Young Fashion

Process Release Posting Prepare Order Print/Send Navigate Actions Navigation Filter options

General

Commitment

101066

Due Date

7/10/2020

Order Type Code

PREPARED

Requested Delivery Date

Season Code

202115

External Document No.

Brand Code

Extension Code

AM

Customer Name

Wilger Young Fashion

Size Range Region Code

Order Date

6/10/2020

Status

Open

Items

Item

101066

Item Code

101066

Description

Top print

Quantity

24

Unit Price

15.00

Line Amount

360.00

Item Quantity

24

Total Incl. VAT (GBP)

540.00

1. Click on the navigation menu item popup **Release**.
2. Click on the link **Release the document to the next stage of processing. When a document is released, it will be included in all availability calculations from the expected receipt date of the items.**

SALES ORDER WORK DATE: 6/10/2020

101066 - Wilger Young Fashion

Process Release Posting Prepare Order Print/Send Navigate Actions Navigation Filter options

General

Commitment

101066

Due Date

7/10/2020

Order Type Code

PREPARED

Requested Delivery Date

Season Code

202115

External Document No.

Brand Code

Extension Code

AM

Customer Name

Wilger Young Fashion

Size Range Region Code

Order Date

6/10/2020

Status

Released

- You must reopen the document before you can make changes to it. (Ctrl+F9).**
3. **Status Released.**  
Specifies whether the document is open, waiting to be approved, has been invoiced for prepayment, or has been released to the next stage of processing.

### Initial Quantity

Specifies how many units have been ordered originally. The Quantity is set when the order is released.

Location Code	Quantity	Initial Quantity	Registered Differences	Auto Can... Re...	Qty
MAIN	10	10	-	<input type="checkbox"/>	
MAIN	24	24	-	<input type="checkbox"/>	

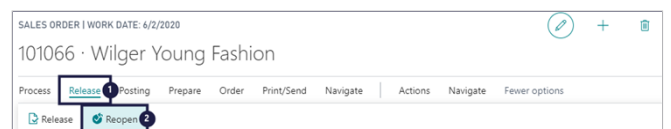
### Registered Differences

Specifies how many units of the item have been registered as change.

Location Code	Quantity	Initial Quantity	Registered Differences	Auto Can... Re...	Qty. to Assemble to Order	Unit Mea
MAIN	10	10	-	<input type="checkbox"/>		PCS
MAIN	24	24	-	<input type="checkbox"/>		PCS

## 3.2.12.2. Registered differences

- Click on the navigation menu item popup **Release**.
- Click on the link **Reopen the document to change it after it has been approved. Approved documents have the Released status and must be opened before they can be changed.**



Click on the link in cell **Quantity** with the value **10**

Location Code	Quantity	Initial Quantity	Registered Differences
MAIN	10	10	
MAIN	24	24	

### K3 Pebblestone

1. **Reason Code Neg. Change.**  
Specifies the reason code that will be used to register a negative change.
2. **Reason Code Pos. Change.**  
Specifies the reason code that will be used to register a positive change.
3. Delete the quantities for size 34 and 44.
4. Click on the button **Close**.

Click on the link in cell **Registered Differences** with the value **-2**

Location Code	Quantity	Initial Quantity	Registered Differences	Auto Can... Re...	Qty. to Assemble to Order	Unit Measure
MAIN	8	10	-2	<input type="checkbox"/>		PCS
MAIN	24	24	-	<input type="checkbox"/>		PCS

### 3.2.12.3. Reset Initial order quantity

1. Click on the navigation menu item popup **Actions**.
2. **Reopens the sales order and allows you to enter quantities without register order differences. When differences exist you must confirm this action and all differences will be removed.**

1. Click on the navigation menu item popup **Release**.
2. Click on **Reopen**.

1. Click on the navigation menu item popup **Actions**.
2. Click on **Reset Initial Order Quantity**.

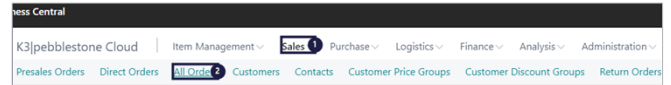
1. **There are registered order differences. When you continue, all registered differences will be removed. Do you want to continue?**
2. Click on the button **Yes**.



### 3.2.13. Batch open en release Sales Orders

#### 3.2.13.1. Navigate to all orders

1. Click on the navigation menu item popup **Sales**.
2. Click on the navigation menu item **All Orders**.



#### 3.2.13.1.1. Open and release orders

1. Move the mouse to the cell **Status** with the value **Open**.
2. Click on the row menu button.
3. Click on the menu item **Select More**.

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	ORDER TYPE	SEASON CODE	EXTERNAL DOCUMENT NO.	LOCATION CODE	ASSIGNED USER ID	DOCUMENT DATE	STATUS	COMP. SHIPP.	AMOUNT SHIPPED	AMOUNT NOT SHIPPED	AMOUNT TOTAL	AMOUNT RECEIVED
101008	1044	New Concepts Fashion	PRESALES	2020SS		EAST		8/12/2019	Released	No	0.00	0.00	4,994.00	4,994.00
101009	1051	Krustyco	PRESALES	2020SS		WEST		8/12/2019	Open	No	0.00	0.00	5,994.00	5,994.00
101010	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No	0.00	0.00	480.00	480.00
101011	1006	Melanie's Shoe Shop	PRESALES	2020SS		MAIN		8/12/2019	Released	No	0.00	0.00	1,640.00	1,640.00
101012	1006	Melanie's Shoe Shop	DIRECT	2020SS		MAIN		8/12/2019	Open	No	0.00	0.00	264.18	264.18
101013	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No	0.00	0.00	0.00	0.00
101014	1005	Wilger Young Fashion	NOOS	2020SS		MAIN		8/12/2019	Open	No	0.00	0.00	0.00	0.00

Select row which you want to release

NO.	NO.	SELL-TO CUSTOMER NAME	CODE
101008	1044	New Concepts Fashion	PRESALES
101009	1051	Krustyco	PRESALES
101010	1005	Wilger Young Fashion	PRESALES
101011	1006	Melanie's Shoe Shop	PRESALES
101012	1006	Melanie's Shoe Shop	DIRECT
101013	1005	Wilger Young Fashion	PRESALES
101014	1005	Wilger Young Fashion	NOOS
101015	1005	Wilger Young Fashion	PRESALES
101016	1007	Britney's Fashion	PRESALES
101017	1005	Wilger Young Fashion	PRESALES

1. Click on the navigation menu item popup **Release**.
2. Release one or more documents to the next stage of processing. When a document is released, it will be included in all availability calculations from the expected receipt date of the items. You must reopen the document before you can make changes to it.

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	ORDER TYPE	SEASON CODE	EXTERNAL DOCUMENT NO.	LOCATION CODE	ASSIGNED USER ID	DOCUMENT DATE	STATUS
101008	1044	New Concepts Fashion	PRESALES	2020SS		EAST		8/12/2019	Released
101009	1051	Krustyco	PRESALES	2020SS		WEST		8/12/2019	Open
101010	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open
101011	1006	Melanie's Shoe Shop	PRESALES	2020SS		MAIN		8/12/2019	Released
101012	1006	Melanie's Shoe Shop	DIRECT	2020SS		MAIN		8/12/2019	Open
101013	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open

1. A pop-up appears: **3 Sales Orders have been released**.
2. Click on the button **OK**.




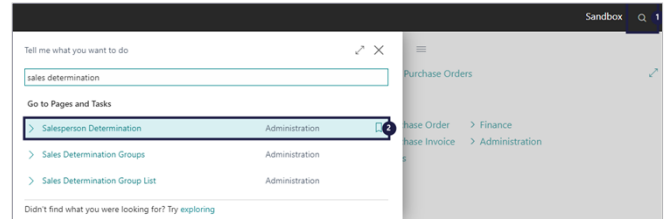
1. Check if the **Status** of the orders are **Released**.

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	ORDER TYPE	SEASON CODE	EXTERNAL DOCUMENT NO.	LOCATION CODE	ASSIGNED USER ID	DOCUMENT DATE	STATUS	COMP. SHIPP.
101008	1044	New Concepts Fashion	PRESALES	2020SS		EAST		8/12/2019	Released	No
101009	1051	Krustyco	PRESALES	2020SS		WEST		8/12/2019	Released	No
101010	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Released	No
101011	1006	Melanie's Shoe Shop	PRESALES	2020SS		MAIN		8/12/2019	Released	No
101012	1006	Melanie's Shoe Shop	DIRECT	2020SS		MAIN		8/12/2019	Released	No
101013	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101014	1005	Wilger Young Fashion	NOOS	2020SS		MAIN		8/12/2019	Open	No
101015	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101016	1007	Britney's Fashion	PRESALES	2020SS		MAIN		8/12/2019	Released	No
101017	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101018	1005	Wilger Young Fashion	PRESALES	2020SS		MAIN		8/12/2019	Open	No
101019	1005	Wilger Young Fashion	DIRECT	2019SS		MAIN		8/12/2019	Open	No
101020	1000	Gulfstream Leather Wear				MAIN		8/12/2019	Released	No

## 3.2.14. Salesperson Determination

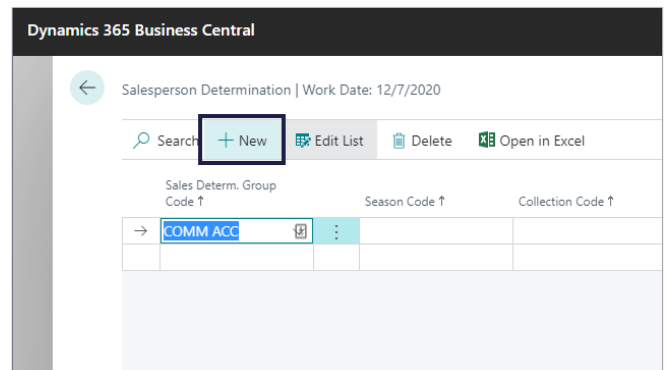
### 3.2.14.1. Navigate to Salesperson Determination

1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.** - Enter the text **sales determination..**
2. Click on **Salesperson Determination Administration** .



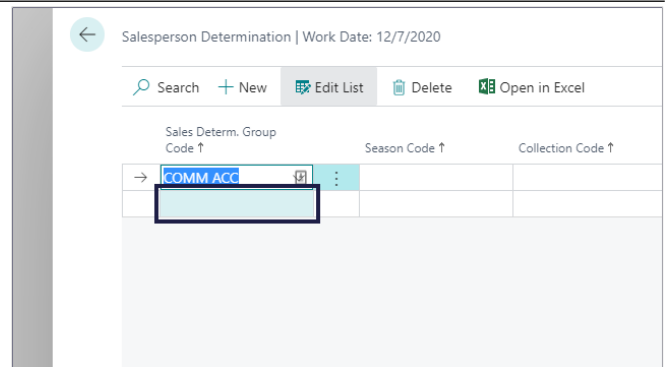
### 3.2.14.2. Create a new Salesperson Determination

Create a new entry.



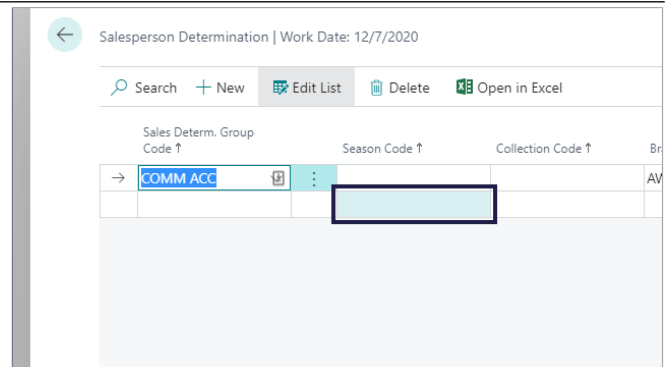
#### Sales Determ. Group Code

Specifies the sales determination group code that must be used on the sales document to determine the salesperson and sales manager.



#### Season Code

Specifies the season code that must be used on the sales document line to determine the salesperson and sales manager.



### K3 Pebblestone

#### Collection Code

Specifies the collection code that must be used on the sales document line to determine the salesperson and sales manager.

n Determination   Work Date: 12/7/2020				
<a href="#">+ New</a> <a href="#">Edit List</a> <a href="#">Delete</a> <a href="#">Open in Excel</a>				
s Determ. Group	Season Code ↑	Collection Code ↑	Brand Code ↑	Item
AM ACC			AWESOME	

#### Brand Code

Specifies the brand code that must be used on the sales document line to determine the salesperson and sales manager.

Date: 12/7/2020				
<a href="#">List</a> <a href="#">Delete</a> <a href="#">Open in Excel</a>				
Season Code ↑	Collection Code ↑	Brand Code ↑	Item Category Code ↑	Ge
		AWESOME		W

#### Item Category Code

Specifies the item category code that must be used on the sales document line to determine the salesperson and sales manager.

Open in Excel				
Collection Code ↑	Brand Code ↑	Item Category Code ↑	Gender Code ↑	Cc
	AWESOME		WOMEN	

#### Gender Code

Specifies the gender code that must be used on the sales document line to determine the salesperson and sales manager.

Brand Code ↑	Item Category Code ↑	Gender Code ↑	Country/Region Code ↑	Sta
AWESOME		WOMEN		

### K3 Pebblestone

#### Country/Region Code

Specifies the country/region code that must be used on the sales document to determine the salesperson and sales manager.

Item Category Code ↑	Gender Code ↑	Country/Region Code ↑	Starting Date ↑	Ending Date
	WOMEN	<input type="text"/>		

#### Starting Date

Specifies the date from which the sales person determination is valid.

Gender Code ↑	Country/Region Code ↑	Starting Date ↑	Ending Date	Salesperson Code
WOMEN		<input type="text"/>		PS

#### Ending Date




Specifies the date to which the sales person determination is valid.



✓ Saved

Country/Region Code ↑	Starting Date ↑	Ending Date	Salesperson Code	Sales Manager Code
		<input type="text"/>	PS	

#### Salesperson Code

Specifies the Salesperson Code. This Salesperson Code is chosen in the sales line based on sales determination group, season, collection, brand, item category, gender and country/region in the sales document.

✓ Saved   

Code ↑	Starting Date ↑	Ending Date	Salesperson Code	Sales Manager Code
			<input type="text"/>	

**Sales Manager Code**

Specifies the Sales Manager Code. This Sales Manager Code is chosen in the sales line based on sales determination group, season, collection, brand, item category, gender and country/region in the sales document.

Beginning Date	Ending Date	Salesperson Code	Sales Manager Code
		PS	

**3.2.15. Document node****3.2.15.1. Navigate to Document node**

The Sales / Purchase Document Node will link item ledger entries to the original order number. They also store the relation between the posted Shipment / Receipt and the Invoice.

The "Document Node" is always under the Related Tab

	Tab	Group	Action
Purchase Order	Related	Documents	Document Node
Purchase Return Order	Related	Documents	Document Node
Sales Order	Related	Documents	Document Node
Sales Order list	Related	Documents	Document Node
Sales Return Order	Related	Documents	Document Node
Posted Sales Shipment	Related		Document Node
Posted Sales Invoice	Related	Invoice	Document Node
Posted Return Receipt	Related	Return Rcpt.	Document Node
Posted Sales Credit Memo	Related	Cr. Memo	Document Node
Posted Purchase Receipt	Related	Receipt	Document Node
Posted Purchase Invoice	Related	Invoice	Document Node
Posted Return Shipment	Related	Return Shpt.	Document Node
Posted Purchase Credit Memo	Related	Cr. Memo	Document Node

1. Click on the navigation menu item popup **Related**.
2. Click on the navigation menu item popup **Documents**.
3. Click on the link **Shows the shipments and invoices related to this order**.

1. **Document Type.**  
Specifies the Document Type of the unposted document.
2. **Document No.**  
Specifies the Document No. of the unposted document.
3. **Shipment No.**  
Specifies the number of the shipment or receipt for this document.
4. **Posted Invoice No.**  
Specifies the number of the invoice or credit memo for this document.

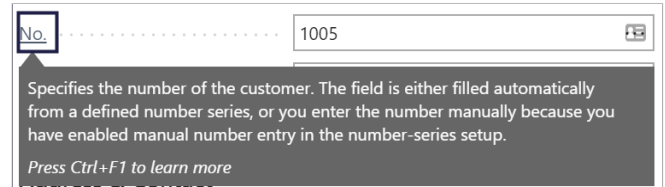
Document Type	Document No.	Shipment No.	Posted Invoice No.
SALES	101125		

## 4. Purchase

### 4.1. Vendor creation

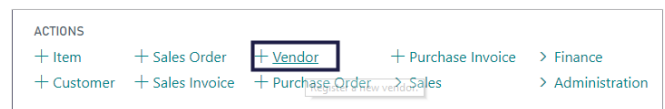
#### 4.1.1. Tooltips

1. All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.

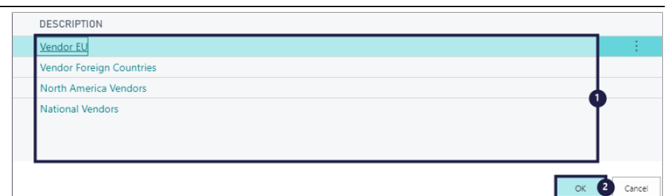


#### 4.1.2. Create a new Vendor

1. Click on the navigation menu item **Vendor**.

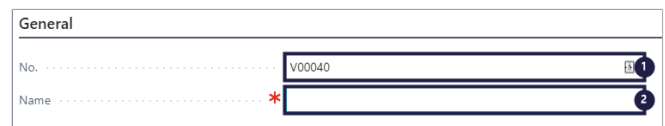


1. **Description.**  
Choose which template you want to use for creating the new Vendor.
2. Click on the button **OK**.



#### 4.1.3. General

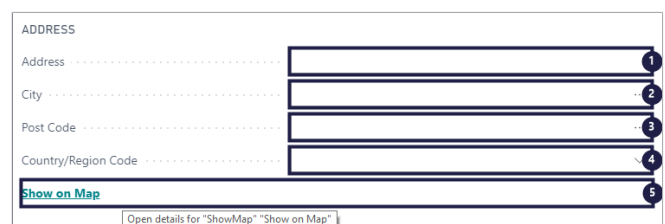
1. **No.**  
Specifies the number of the Vendor. The field is either filled automatically from a defined number serie, or you enter the number manually.
2. **Name.**  
Specifies the vendor's name. You can enter a maximum of 30 characters, both numbers and letters.



#### 4.1.4. Address & Contacts

##### 4.1.4.1. Address

1. **Address.**  
Add the address.
2. **City.**  
Add the City from the dropdown, if the City does not exist create one.
3. **Post Code.**  
Add the Post Code from the dropdown, if the Post code does not exist create a one.
4. **Country/Region Code.**  
Add the Country Code from the dropdown, if the Country does not



excist create one.

5.

**Open details for "ShowMap"**  
**"Show on Map".**

#### 4.1.4.2.

### Contacts

1.

**Contact.**

Add the name of the person you regularly contact when you do business with this vendor.

2.

**Phone No.**

Add the Phone Number.

3.

**Email.**

Add the vendor's email address.

4.

**Home Page.**

Add the vendor's web site.

CONTACT	
Contact .....	<input type="text"/>
Phone No. ....	<input type="text"/>
Email .....	<input type="text"/>
Home Page .....	<input type="text"/>

#### 4.1.5.

### Invoicing

1.

**VAT Registration No.**

Add the vendor's VAT registration number.

2.

**Prices Including VAT, No.**

Specifies if the Unit Price and Line Amount fields on document lines should be shown with or without VAT.

Invoicing	
VAT Registration No. ....	<input type="text"/>
Prices Including VAT .....	<input type="checkbox"/>

#### 4.1.6.

### Payments

1.

**Payment Terms Code.**

Choose a Payment Term code from the dropdown, if the Payment Term code does not excist create one.

2.

**Payment Method Code.**

Choose how to make payment, such as with bank transfer, cash, or check. if the Payment Method code does not excist create one.

3.

**Cash Flow Payment Terms Code.**

Choose a Cash Flow Payment Term code from the dropdown, if the Cash Flow Payment Term code does not excist create one.

Payments			
Payment Terms Code .....	<input type="text"/>	Cash Flow Payment Terms Code .....	<input type="text"/>
Payment Method Code .....	<input type="text"/>		

#### 4.1.7.

### Receiving

1.

**Location Code.**

Choose a Location code from the dropdown, if the Location code does not excist create one.

Receiving			
Location Code .....	<input type="text"/>	Lead Time Calculation .....	<input type="text"/>
Payment Method Code .....	<input type="text"/>	Customized Calendar .....	<input type="text"/>

2. **Shipment Method Code.**  
Add the delivery conditions of the related shipment, such as free on board (FOB). If the Shipment Method Code does not exist create one.
- 3.

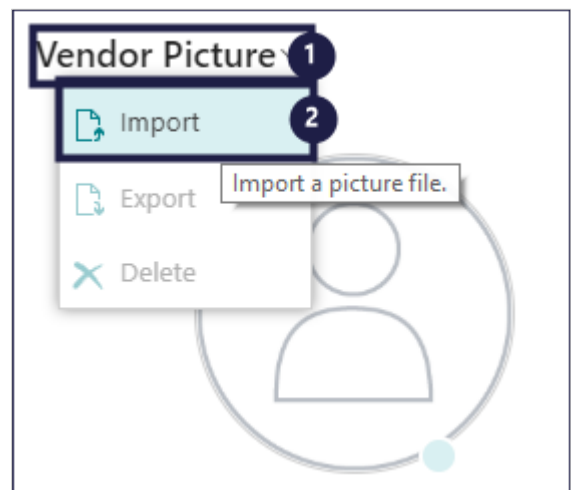
#### Lead Time Calculation.

Add a date formula for the amount of time it takes to replenish the item.

4. **Customized Calendar.**  
Specifies if you have set up a customized calendar for the vendor.

### 4.1.8. Picture

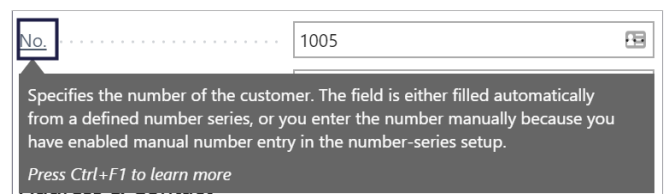
1. Click on the link **Actions for Vendor Picture.**
2. **Import.**  
Choose import and add a picture.



## 4.2. Purchase order creation

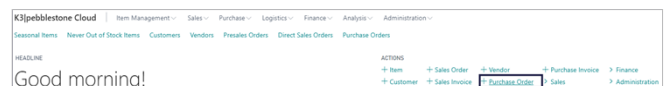
### 4.2.1. Tooltips

1. All over in the application you can check if there is a tooltip. Hover the pointer over an item, without clicking it, and a tooltip may appear.



### 4.2.2. Create a new Purchase Order

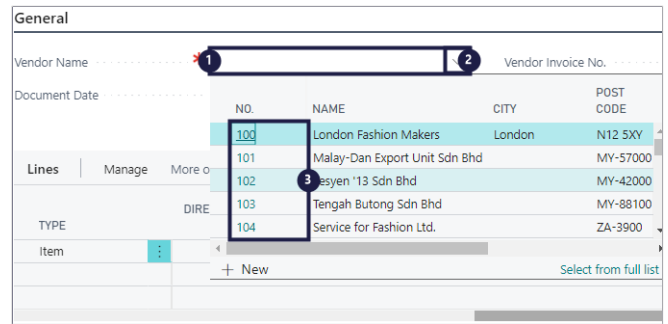
1. Click on the navigation menu item **Purchase Order.**



### 4.2.3. General

1. Move the mouse to the field **Vendor Name.**
2. Click on the lookup button **Vendor Name.**
3. Choose the name of the vendor who delivers the products.





1. Move the mouse to the field **Document Date**. Specifies the date when the related document was created.

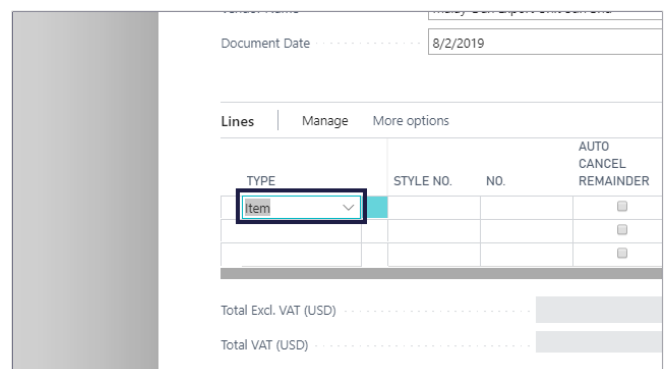


1. **Vendor Invoice No.**  
Specifies the document number of the original document you received from the vendor. You can require the document number for posting, or let it be optional. By default, it's required, so that this document references the original.
2. **Vendor Order No.**  
Add the vendor's order number, if needed.
3. **Purchaser Code.**  
Specifies which purchaser is assigned to the vendor.
4. **Status.**  
Specifies whether the record is open, waiting to be approved, invoiced for prepayment, or released to the next stage of processing.

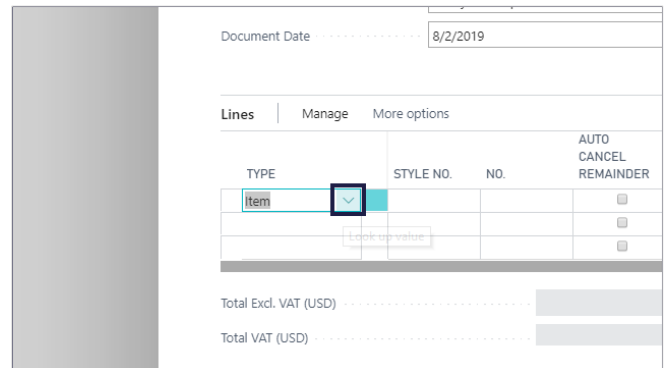


## 4.2.4. Purchase Lines

### Type



Click on the lookup button in the cell **Type**



Document Date ..... 8/2/2019

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER
Item			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

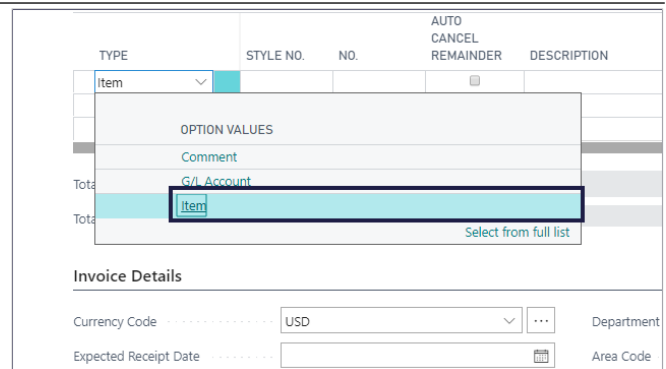
Look up value

Total Excl. VAT (USD) .....

Total VAT (USD) .....

Move the mouse to the cell **Option Values** with the value **Item**

Specifies the type of transaction that will be posted with the document line. If you select Comment, then you can enter any text in the Description field, such as a message to a vendor.



TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

OPTION VALUES

Comment

G/L Account

Item

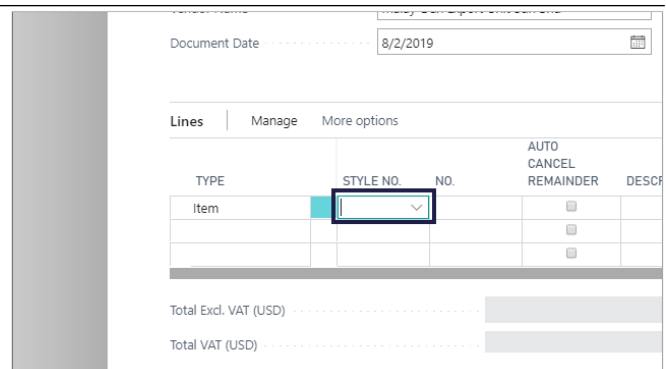
Select from full list

Invoice Details

Currency Code ..... USD ..... Department

Expected Receipt Date ..... Area Code

**Style No.**



Document Date ..... 8/2/2019

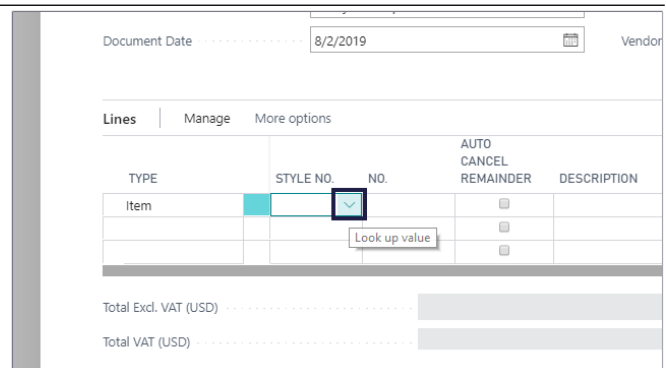
Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCR
Item			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Total Excl. VAT (USD) .....

Total VAT (USD) .....

Click on the lookup button in the cell **Style No.**



Document Date ..... 8/2/2019 Vendor

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Look up value

Total Excl. VAT (USD) .....

Total VAT (USD) .....

## K3 Pebblestone

Move the mouse to the cell **No.** on any row  
Choose the Style number.

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Total Excl. VAT (USD) ..... + New

Total VAT (USD) .....

Invoice Details

Currency Code ..... USD

**No.**

Vendor Invoice No. .... TEST

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	T901		<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Item Quantity .....

Click on the lookup button in the cell **No.**

Invoice No. .... TEST

Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
PE	T901		<input type="checkbox"/>	
m			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Look up value

Quantity .....

Click on the cell **No.** on any row  
Choose the item, number of a general ledger account,  
resource, additional cost, or fixed asset, depending on  
the contents of the Type field.

Lines | Manage | More options

TYPE	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
Item	T901		<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

Item Quantity .....

Total Excl. VAT (USD) .....

Invoice Details

### Auto Cancel Remainder

Specifies if the remaining quantity will automatically be canceled when receiving less than the ordered quantity.

Invoice No. .... TEST				
Manage More options				
	STYLE NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION
	T901	10003	<input checked="" type="checkbox"/>	T-shirt print
			<input type="checkbox"/>	
			<input type="checkbox"/>	
			<input type="checkbox"/>	

### Description

Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.

TEST				Status .....
ons				
NO.	NO.	AUTO CANCEL REMAINDER	DESCRIPTION	LOCATION CODE
	10003	<input type="checkbox"/>	T-shirt print	MAIN
		<input type="checkbox"/>	T-shirt print	
		<input type="checkbox"/>		
		<input type="checkbox"/>		

0 Total VAT (USD)

### Location Code

Specifies a code for the location where you want the items to be placed when they are received.

Status .....				
CANCEL REMAINDER				
	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE
<input type="checkbox"/>	T-shirt print	MAIN		PCS
<input type="checkbox"/>		MAIN		
<input type="checkbox"/>				
<input type="checkbox"/>				

0 Total VAT (USD)

### Quantity

Status ..... Open				
DESCRIPTION				
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST
T-shirt print	MAIN		PCS	

0 Total VAT (USD)

Click on the lookup button in the cell **Quantity**  
Fill in the quantities in the order matrix

Status ..... Open					
	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT
	MAIN	<input type="text" value=""/>	PCS		
			<input type="button" value="Look up value"/>		
		0	Total VAT (USD) .....		

### Quantity

Specifies the number of units of the item specified on the line.

Status ..... Open					
DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST	
T-shirt print	MAIN	<input type="text" value="480"/>	PCS		
		480	Total VAT (USD) .....		

### 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.

Status ..... Open					
LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %	
MAIN	480	<input type="text" value="PCS"/>			
		480	Total VAT (USD) .....		

### Direct Unit Cost

Specifies the cost of one unit of the selected item or resource.

Status ..... Open					
LOCATION CODE	QUANTITY ↑	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %	LINE AMOUNT
MAIN	480	PCS	<input type="text" value=""/>		
		Total VAT (USD) .....			

Open					
QUANTITY ↑	UNIT OF MEASURE CODE	DIRECT UNIT COST	LINE DISCOUNT %	LINE AMOUNT	QTY. TO RECEIVE
480	PCS				480
0.00					

[illegible]

DIRECT UNIT COST		LINE DISCOUNT %	LINE AMOUNT	QTY. TO RECEIVE	QUANTITY RECEIVED	QTY. TO INVOICE
			480		—	480
			480	Total VAT (USD)		

<a href="#">Open</a>				
LINE DISCOUNT %	LINE AMOUNT	QTY. TO RECEIVE	QUANTITY RECEIVED	QTY INVC
		480	-	
				0.00

**Qty. to Invoice**

Specifies the quantity that remains to be invoiced. It is calculated as Quantity - Qty. Invoiced.

Status ..... Open					
LINE AMOUNT	QTY. TO RECEIVE	QUANTITY RECEIVED	QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE
	480	-	480	-	
480	Total VAT (USD) .....				

**Quantity Invoiced**

Specifies how many units of the item on the line have been posted as invoiced.

..... Open					
QTY. TO RECEIVE	QUANTITY RECEIVED	QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE
480	-	480	-		2/12/2020
d) .....					0.00

**Planned Receipt Date**

Specifies the date when the item is planned to arrive in inventory.

..... Open					
QUANTITY RECEIVED	QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE	SE/COI
-	480	-		2/12/2020	201
.....					0.00

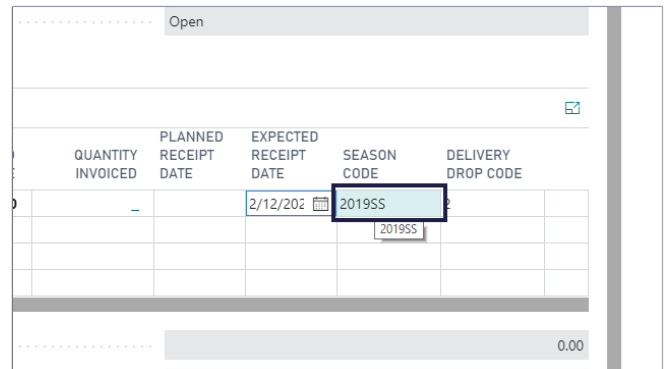
**Expected Receipt Date**

Specifies the date you expect the items to be available in your warehouse. If you leave the field blank, it will be calculated as follows: Planned Receipt Date + Safety Lead Time + Inbound Warehouse Handling Time = Expected Receipt Date.

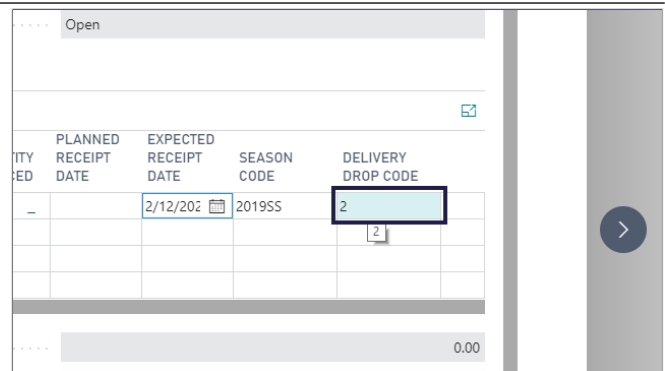
Open					
QTY. TO INVOICE	QUANTITY INVOICED	PLANNED RECEIPT DATE	EXPECTED RECEIPT DATE	SE/COI	
480	-		2/12/2020	201	
.....					0.00

**Season Code**

Specifies a code for the season that this ordered item belongs to.


**Delivery Drop Code**

Specifies a code for the delivery drop that this item belongs to.



1. **Item Quantity.**  
Specifies the Total Quantity field on all lines of type Item in the document.
2. **Total Excl. VAT (USD).**  
Specifies the sum of the value in the Line Amount Excl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.
3. **Total VAT (USD).**  
Specifies the sum of VAT amounts on all lines in the document.
4. **Total Incl. VAT (USD).**  
Specifies the sum of the value in the Line Amount Incl. VAT field on all lines in the document minus any discount amount in the Invoice Discount Amount field.



## 4.2.5. Invoice details

1. **Currency Code.**  
Specifies the currency of amounts on the purchase document.
2. **Expected Receipt Date.**  
Specifies the date you expect the items to be available in your warehouse. If you leave the field blank, it will be calculated as follows:  
Planned Receipt Date + Safety Lead Time + Inbound Warehouse Handling Time = Expected Receipt Date.
3. **VAT Bus. Posting Group.**



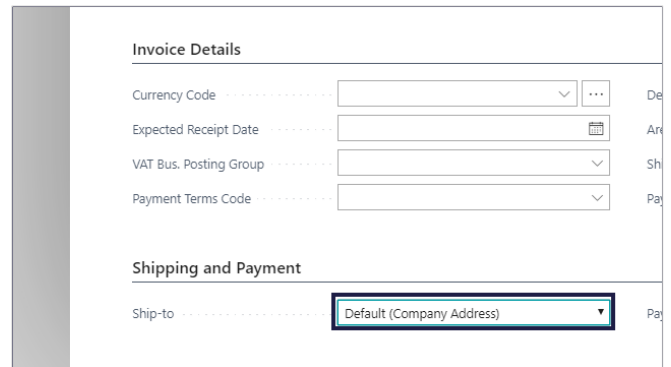


- Specifies the VAT specification of the involved customer or vendor to link transactions made for this record with the appropriate general ledger account according to the VAT posting setup.
4. **Payment Terms Code.**  
Specifies a formula that calculates the payment due date, payment discount date, and payment discount amount.
  5. **Shipment Method Code.**  
Specifies the delivery conditions of the related shipment, such as free on board (FOB).
  6. **Payment Reference.**  
Specifies the payment of the purchase invoice.
  7. **Creditor No.**  
Specifies the number of the vendor.
  8. **Requested Receipt Date.**  
Specifies the date that you want the vendor to deliver to the ship-to address.

## 4.2.6. Shipping & Payment

### Ship-to

Specifies the address that the products on the purchase document are shipped to. Default (Company Address): The same as the company address specified in the Company Information window.

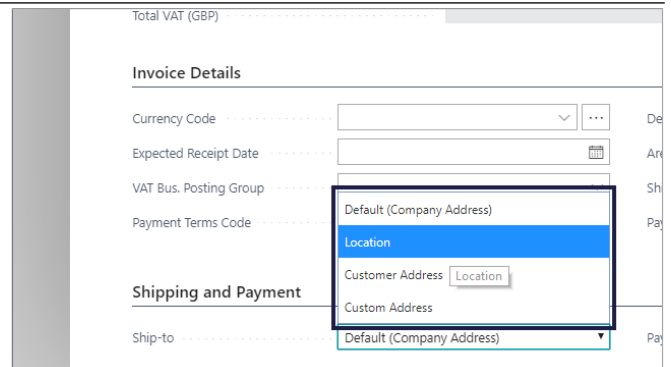


The screenshot shows the 'Invoice Details' section with fields for Currency Code, Expected Receipt Date, VAT Bus. Posting Group, and Payment Terms Code. Below this is the 'Shipping and Payment' section, where the 'Ship-to' dropdown menu is open, displaying 'Default (Company Address)' as the selected option.

### Default (Company Address)

Location: One of the company's location addresses.  
Customer Address: Used in connection with drop shipment.

Custom Address: Any ship-to address that you specify in the fields below.



The screenshot shows the 'Invoice Details' section with fields for Currency Code, Expected Receipt Date, VAT Bus. Posting Group, and Payment Terms Code. Below this is the 'Shipping and Payment' section, where the 'Ship-to' dropdown menu is open, displaying a list of options: 'Default (Company Address)', 'Location', 'Customer Address', and 'Custom Address'. The 'Location' option is highlighted.



1. Click on the link in cell **Code** on any row.

Add the quantity for the **Ratio Curve Quantity**, press Tab.  
The quantities will be filled based on the Ratio Curve.

1. Click on the button **Close**.

## 5. From sales to purchase

### 5.1. Presales Worksheet BC25

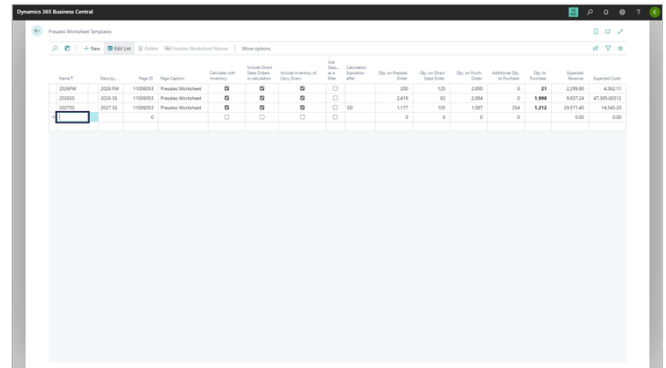
In the dynamic and fast-paced fashion industry, efficient presales management is crucial for success. Fashion brands must carefully plan and track their seasonal collections to ensure they meet market demand while managing production constraints. K3 Pebblestone on Microsoft Business Central offers an advanced presales worksheet functionality that streamlines this process, empowering multiple users to manage their respective parts of each collection effectively.



#### 5.1.1. Presales Worksheet Templates

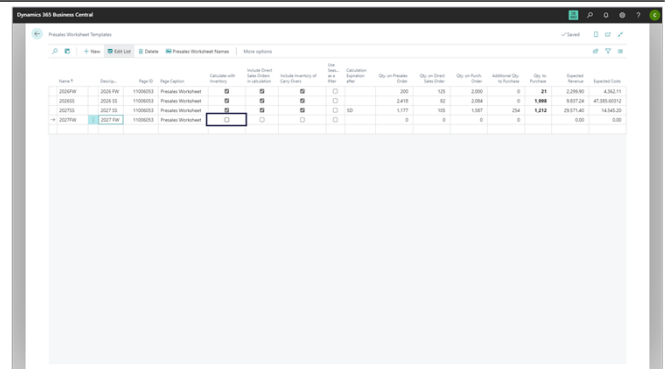
A presales worksheet template can be created for each presales season or delivery drop. Per template, settings can be configured to determine whether to account for direct sales orders or existing inventory.

Enter the new template name



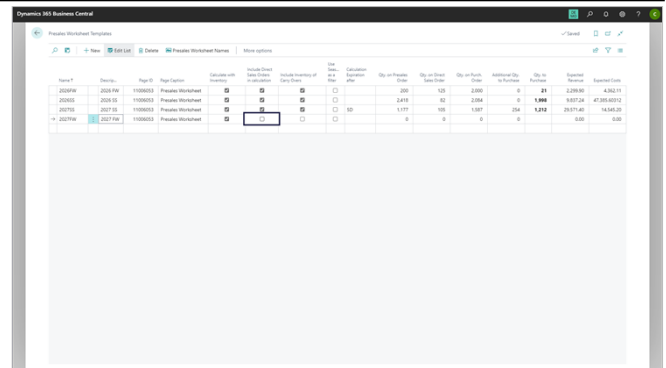
Name	Entity	Page ID	Page Caption	Calculate with Inventory	Include Direct Sales Orders	Include Inventory of Day Order	Calculation Date-Time	Qty on Hand	Qty on Order	Qty on Hand	Qty on Order	Additional Qty	Qty to Receive	Expected Receipt	Expected Cost
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		200	125	2000	0	0	0	21	2,200.00
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2,410	62	2,004	0	0	0	1,900	5,607.24
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		1,177	100	1,007	254	0	0	1,254	2,617.40
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0	0	0	0	0.00

Choose whether existing inventory should be included in the calculation



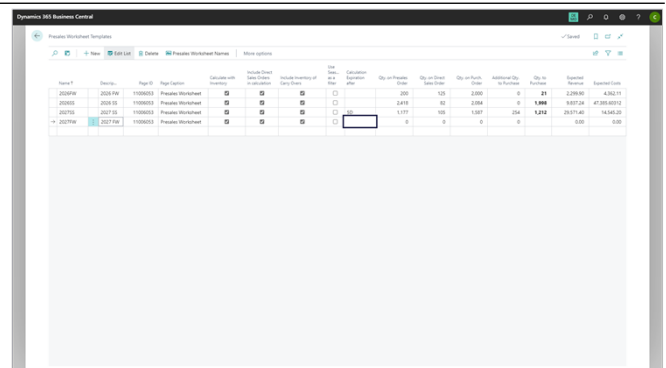
Name	Entity	Page ID	Page Caption	Calculate with Inventory	Include Direct Sales Orders	Include Inventory of Day Order	Calculation Date-Time	Qty on Hand	Qty on Order	Qty on Hand	Qty on Order	Additional Qty	Qty to Receive	Expected Receipt	Expected Cost
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		200	125	2000	0	0	0	21	2,200.00
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2,410	62	2,004	0	0	0	1,900	5,607.24
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		1,177	100	1,007	254	0	0	1,254	2,617.40
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0	0	0	0	0.00

Choose whether direct sales orders should be included in the calculation



Name	Entity	Page ID	Page Caption	Calculate with Inventory	Include Direct Sales Orders	Include Inventory of Day Order	Calculation Date-Time	Qty on Hand	Qty on Order	Qty on Hand	Qty on Order	Additional Qty	Qty to Receive	Expected Receipt	Expected Cost
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		200	125	2000	0	0	0	21	2,200.00
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2,410	62	2,004	0	0	0	1,900	5,607.24
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		1,177	100	1,007	254	0	0	1,254	2,617.40
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0	0	0	0	0.00

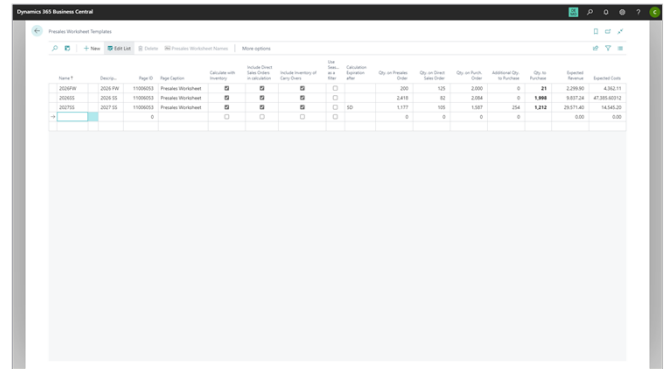
Enter the date formula that indicates when a calculation is too old and recalculation of the lines is recommended for the 'Calculation Date-Time' field



Name	Entity	Page ID	Page Caption	Calculate with Inventory	Include Direct Sales Orders	Include Inventory of Day Order	Calculation Date-Time	Qty on Hand	Qty on Order	Qty on Hand	Qty on Order	Additional Qty	Qty to Receive	Expected Receipt	Expected Cost
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		200	125	2000	0	0	0	21	2,200.00
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		2,410	62	2,004	0	0	0	1,900	5,607.24
202505	2025 02	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		1,177	100	1,007	254	0	0	1,254	2,617.40
202509	2025 F4	1100053	Pebblestone Worksheet	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0	0	0	0	0	0	0	0.00

### 5.1.1.1. Multi-User Presales Worksheet Names

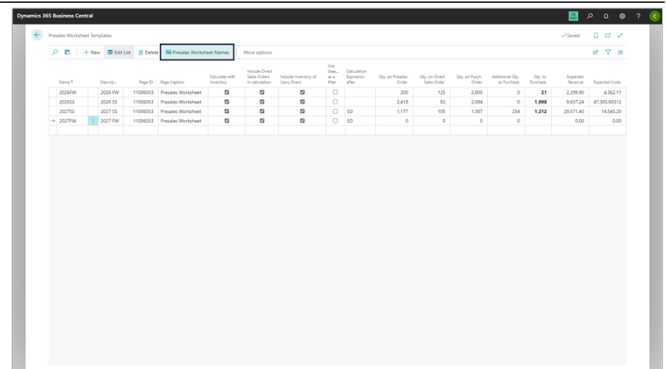
The presales worksheet in K3 Pebblestone allows multiple users to have their own presales worksheet batch. This is essential for fashion brands, as different teams or individuals often handle various aspects of a seasonal collection. Each user can work independently on their batch, ensuring focused and efficient management of their responsibilities.



Name	Description	Age	Age Category	Calculation Method	Include Inventory of Sales Order	Calculation Method	Qty on Presales Order	Qty on Presales Order	Qty on Presales Order	Additional Qty to Purchase	Qty to Purchase	Expected Revenue	Expected Costs
2027W	2027 W	1000000	Presales Worksheet				200	125	2000	0	21	220000	4,562.11
2027W	2027 W	1000000	Presales Worksheet				2410	62	2000	0	1,000	5857.24	47,395.00
2027W	2027 W	1000000	Presales Worksheet				1,137	100	1,000	254	1,242	2637.40	14,545.20
2027W	2027 W	1000000	Presales Worksheet				0	0	0	0	0	0.00	0.00

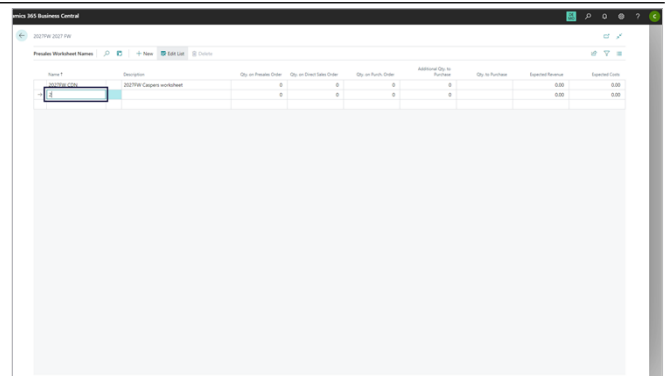
In an existing template, create a new worksheet name for each user to work with their own set of items

Click on the navigation menu item **Presales Worksheet Names**



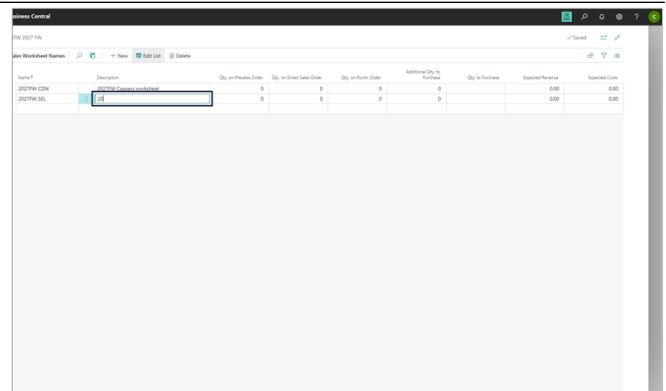
Name	Description	Age	Age Category	Calculation Method	Include Inventory of Sales Order	Calculation Method	Qty on Presales Order	Qty on Presales Order	Qty on Presales Order	Additional Qty to Purchase	Qty to Purchase	Expected Revenue	Expected Costs
2027W	2027 W	1000000	Presales Worksheet				200	125	2000	0	21	220000	4,562.11
2027W	2027 W	1000000	Presales Worksheet				2410	62	2000	0	1,000	5857.24	47,395.00
2027W	2027 W	1000000	Presales Worksheet				1,137	100	1,000	254	1,242	2637.40	14,545.20
2027W	2027 W	1000000	Presales Worksheet				0	0	0	0	0	0.00	0.00

Enter the new name



Name	Description	Age	Age Category	Calculation Method	Include Inventory of Sales Order	Calculation Method	Qty on Presales Order	Qty on Presales Order	Qty on Presales Order	Additional Qty to Purchase	Qty to Purchase	Expected Revenue	Expected Costs
2027W	2027 W	1000000	Presales Worksheet				200	125	2000	0	21	220000	4,562.11
2027W	2027 W	1000000	Presales Worksheet				2410	62	2000	0	1,000	5857.24	47,395.00
2027W	2027 W	1000000	Presales Worksheet				1,137	100	1,000	254	1,242	2637.40	14,545.20
2027W	2027 W	1000000	Presales Worksheet				0	0	0	0	0	0.00	0.00

Enter the new description



Name	Description	Age	Age Category	Calculation Method	Include Inventory of Sales Order	Calculation Method	Qty on Presales Order	Qty on Presales Order	Qty on Presales Order	Additional Qty to Purchase	Qty to Purchase	Expected Revenue	Expected Costs
2027W	2027 W	1000000	Presales Worksheet				200	125	2000	0	21	220000	4,562.11
2027W	2027 W	1000000	Presales Worksheet				2410	62	2000	0	1,000	5857.24	47,395.00
2027W	2027 W	1000000	Presales Worksheet				1,137	100	1,000	254	1,242	2637.40	14,545.20
2027W	2027 W	1000000	Presales Worksheet				0	0	0	0	0	0.00	0.00

### 5.1.2. Presales Worksheet

Based on the collected presold order quantities, the presales plan allows determining the quantities to be purchased or produced.

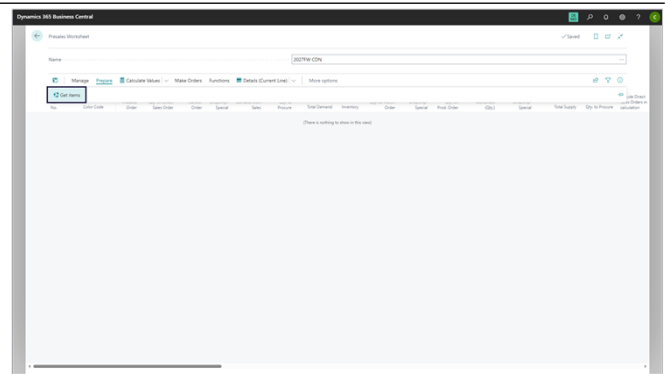
### 5.1.2.1. Get Items function

To create a presales worksheet, users can add items to the worksheet using the "Get Items" function. This feature provides extensive filtering options, making it easy to fetch items based on specific criteria such as:

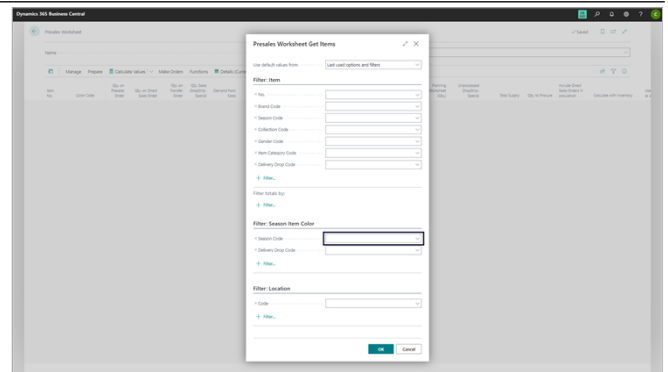
- Season
- Delivery drop
- Item category
- Gender
- Collection

These filters ensure that only relevant items are included in the worksheet, allowing for targeted and accurate presales management.

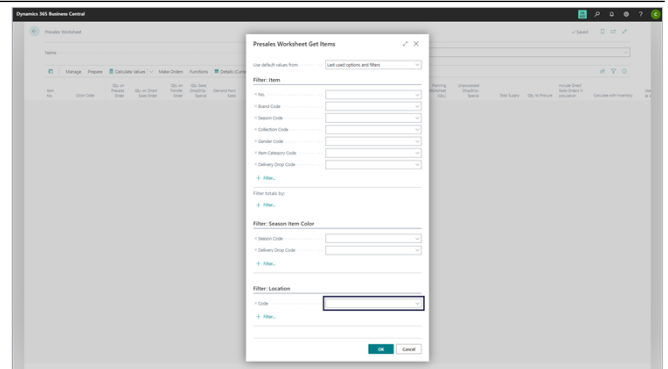
Click on the navigation menu item Prepare and Get Items



Optionally, apply a filter to the presales season

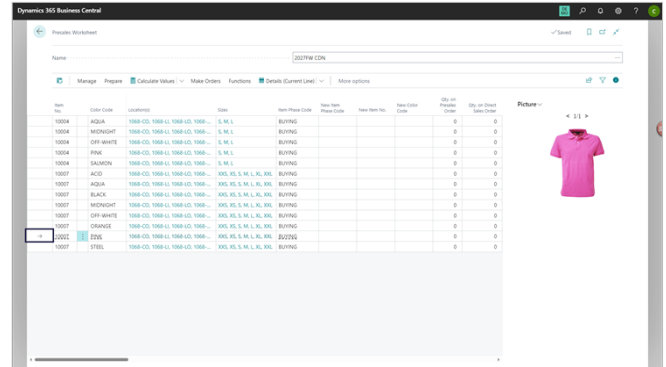


Apply a filter to the location if desired.  
If no location filter is entered, an overview of all locations is provided, which offers less clarity.



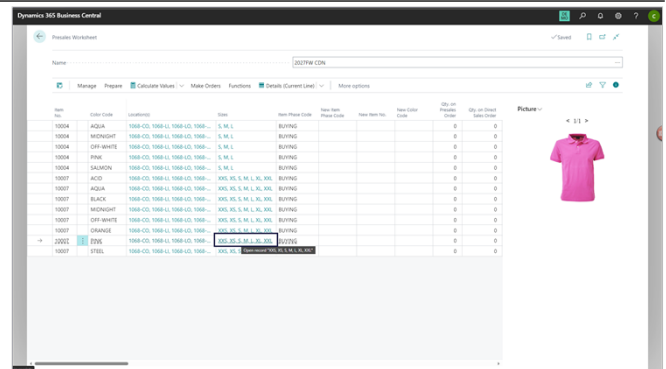
## K3 Pebblestone

Each line in the worksheet is created per item color, accommodating the common industry practice where an item is available in multiple colors.



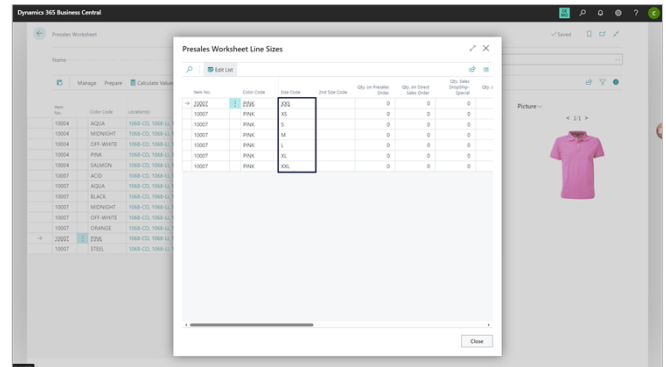
Item No.	Color Code	Location	Size	Item Phase Code	Item No. (New)	Item Color Code	Qty. on Hand	Qty. on Order
10004	AQUA	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	MIDNIGHT	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	OFF WHITE	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	PINK	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	SALMON	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10007	ACID	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	AQUA	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	BLACK	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	MIDNIGHT	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	OFF WHITE	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	ORANGE	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
20002	EVIS	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	STEEL	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0

Clicking on the displayed size range shows information per size



Item No.	Color Code	Location	Size	Item Phase Code	Item No. (New)	Item Color Code	Qty. on Hand	Qty. on Order
10004	AQUA	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	MIDNIGHT	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	OFF WHITE	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	PINK	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10004	SALMON	1000-CO	1000-L	1000-US	1000...	S, M, L	0	0
10007	ACID	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	AQUA	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	BLACK	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	MIDNIGHT	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	OFF WHITE	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	ORANGE	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
20002	EVIS	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0
10007	STEEL	1000-CO	1000-L	1000-US	1000...	XXS, XS, S, M, L, XL, XXL	0	0

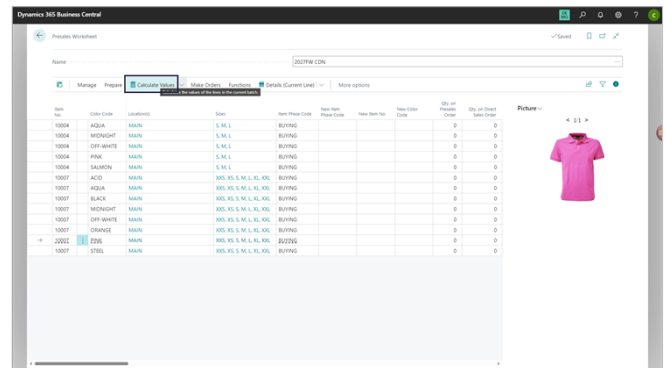
The information shows on size level



Item No.	Color Code	Item Color Code	Qty. on Hand
20002	EVIS	XXS	0
10007	PINK	XS	0
10007	PINK	S	0
10007	PINK	M	0
10007	PINK	L	0
10007	PINK	XL	0
10007	PINK	XXL	0

### 5.1.2.2. Calculate Values function

By clicking the menu item Calculate Values, the presold quantities, the quantities on direct sales orders, inventory, and purchase orders are calculated, the threshold quantities are retrieved, and the other totals are recalculated



Item No.	Color Code	Location	Size	Item Phase Code	Item No. (New)	Item Color Code	Qty. on Hand	Qty. on Order
10004	AQUA	MAIN	S, M, L	BUYING			0	0
10004	MIDNIGHT	MAIN	S, M, L	BUYING			0	0
10004	OFF WHITE	MAIN	S, M, L	BUYING			0	0
10004	PINK	MAIN	S, M, L	BUYING			0	0
10004	SALMON	MAIN	S, M, L	BUYING			0	0
10007	ACID	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0
10007	AQUA	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0
10007	BLACK	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0
10007	MIDNIGHT	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0
10007	OFF WHITE	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0
10007	ORANGE	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0
20002	EVIS	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0
10007	STEEL	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING			0	0

## K3 Pebblestone

The quantities in the lines are summed per item color for the specified location(s).  
The quantities per size can also be displayed.

Item No.	Color Code	Location	Size	Item Phase Code	New Item No.	New Item Phase Code	New Item Size	Qty on Hand	Qty on Order
10004	AQUA	MAIN	S, M, L	BUYING				152	21
10004	MIDNIGHT	MAIN	S, M, L	BUYING				0	0
10004	OFF-WHITE	MAIN	S, M, L	BUYING				292	42
10004	PINK	MAIN	S, M, L	BUYING				207	42
10004	SALMON	MAIN	S, M, L	BUYING				0	0
10007	ACID	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				0	0
10007	AQUA	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				0	0
10007	BLACK	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				296	0
10007	MIDNIGHT	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				100	0
10007	OFF-WHITE	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				100	0
10007	ORANGE	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				0	0
20002	STEEL	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				0	0
10007	STEEL	MAIN	XXS, XS, S, M, L, XL, XXL	BUYING				0	0

### 5.1.2.3. Undersold item color combinations

During the presales period, it is possible to monitor which colors are selling well and which are lagging. Adjustments can be made during the presales period to convert less sold colors to better-selling colors. This allows more focus on the popular colors throughout the period.

Based on the pre-sold quantities, enter a new Item Phase for item color combinations that need to be blocked because they are undersold.

Enter a new Item Phase with the value BLOCKED

Item No.	Color Code	Item Phase Code	New Item No.	New Item Phase Code	New Item Size	Qty on Hand	Qty on Order	Total Demand
10004	AQUA	BUYING				152	21	173
10004	MIDNIGHT	BUYING				0	0	13
10004	OFF-WHITE	BUYING				292	42	334
10004	PINK	BUYING				207	42	249
10004	SALMON	BUYING				0	0	22
10007	ACID	BUYING				0	0	0
10007	AQUA	BUYING				0	0	0
10007	BLACK	BUYING				296	0	296
10007	MIDNIGHT	BUYING				100	0	100
10007	OFF-WHITE	BUYING				100	0	100
10007	ORANGE	BUYING				0	0	0
20002	STEEL	BUYING				0	0	0
10007	STEEL	BUYING				0	0	0

Click on the navigation menu item Functions and Apply New Item Phases

Item No.	Color Code	Item Phase Code	New Item No.	New Item Phase Code	New Item Size	Qty on Hand	Qty on Order	Total Demand
10004	AQUA	BUYING				152	21	173
10004	MIDNIGHT	BUYING				0	0	13
10004	OFF-WHITE	BUYING				292	42	334
10004	PINK	BUYING				207	42	249
10004	SALMON	BUYING				0	0	22
10007	ACID	BUYING				0	0	0
10007	AQUA	BUYING				0	0	0
10007	BLACK	BUYING				296	0	296
10007	MIDNIGHT	BUYING				100	0	100
10007	OFF-WHITE	BUYING				100	0	100
10007	ORANGE	BUYING				0	0	0
20002	STEEL	BUYING				0	0	0
10007	STEEL	BUYING				0	0	0



## K3 Pebblestone

The new item phases will be transferred to the "Item Phase" column and the "New Item Phase" column will be cleared

The screenshot shows the 'Presales Worksheet' in Dynamics 365 Business Central. The table lists various items with columns for Item No., Color Code, New Item Phase, New Item Color, Qty on Hand, Qty on Order, and Total Demand. Several items are marked as 'BLOCKED' in the 'New Item Phase' column, including 10004 (AQUA), 10004 (MIDNIGHT), 10004 (OFF-WHITE), 10004 (PINK), 10004 (SALMON), 10007 (ACID), 10007 (AQUA), 10007 (BLACK), 10007 (MIDNIGHT), 10007 (OFF-WHITE), 10007 (ORANGE), 10007 (PINK), and 10007 (STEEL).

### 5.1.2.4. Replace blocked item colors

#### 5.1.2.4.1. Enter New Item No. and New Item Color

For the blocked item colors, a replacement item can be entered

This screenshot shows the 'Presales Worksheet' with a replacement item entered. The 'New Item No.' column now contains '10004' for the previously blocked items, and the 'New Item Color' column contains 'OFF-WHITE'. The 'Total Demand' column shows the updated values for each item.

For another blocked item color, a replacement color can be entered

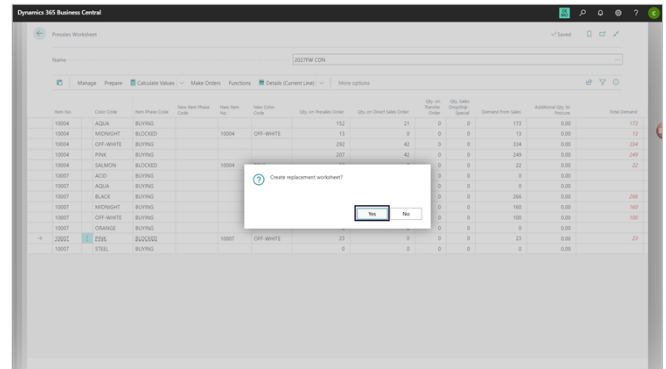
This screenshot shows the 'Presales Worksheet' with another replacement item entered. The 'New Item No.' column now contains '10004' for the previously blocked items, and the 'New Item Color' column contains 'PINK'. The 'Total Demand' column shows the updated values for each item.

#### 5.1.2.4.2. Function Create replacements

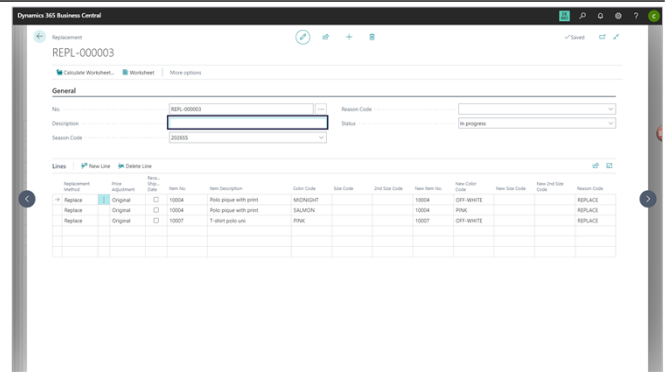
With this function in the presales worksheet, the system identifies which item colors are blocked and where it needs to create a replacement. It is also possible to run the replacement standalone.

This screenshot shows the 'Presales Worksheet' with the 'Create Replacements' function highlighted in the 'Functions' tab. The function is used to automatically create replacement items for blocked colors.

The replacement worksheet will be created

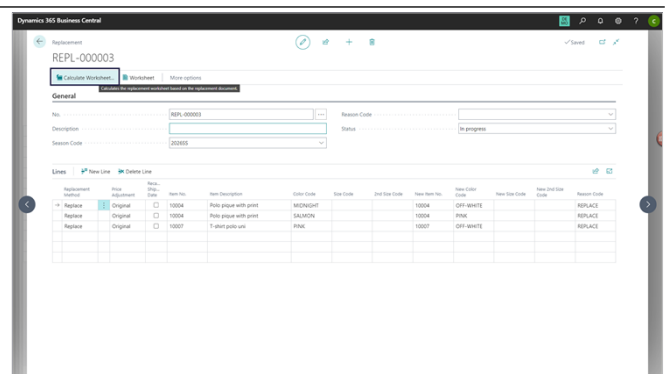


In the Replacement page, you can indicate through the Replacement Method whether the blocked item should be replaced or canceled.

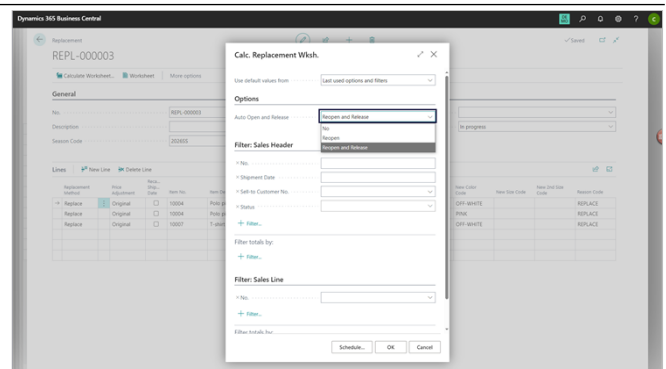


By using the Calculate Worksheet function, all the sales lines for the specified item color combinations are found and automatically replaced or canceled, with the system providing them with a reason code in the sales lines.

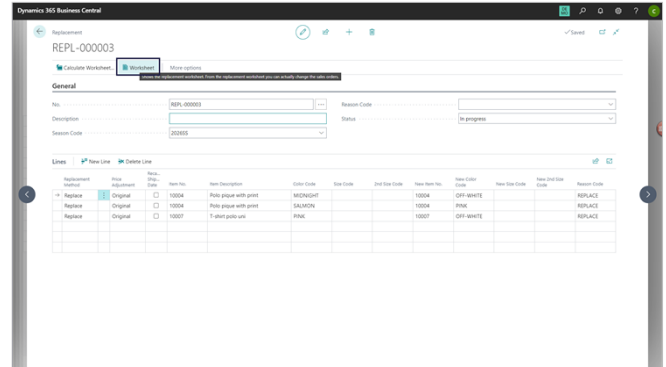
Click on the navigation menu item Calculate Worksheet.



Automatic opening and releasing of sales orders is possible to enable changes in the sales orders



Click on the navigation menu item **Worksheet**

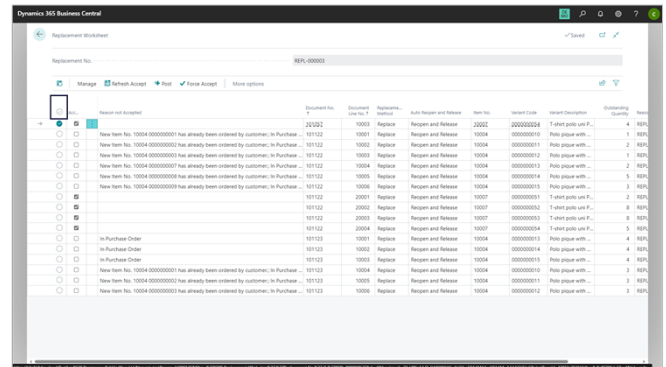


### 5.1.2.4.3. Replacement Worksheet

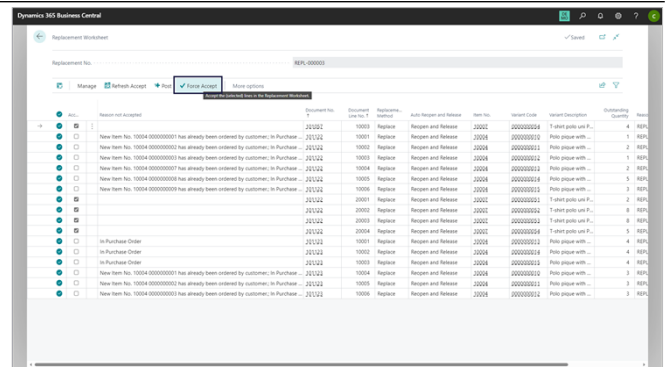
#### 5.1.2.4.3.1. Accept the proposed replacement sales order lines

One can review and optionally check or uncheck the suggested replacement sales order lines. Customers can be informed, and based on their preference, the replacement or cancellation can be accepted.

Additionally, multiple suggested lines can be selected and all checked at once, using the 'Force Accept' function.



Click on the navigation menu item **Force Accept**



#### 5.1.2.4.3.2. Post proposed and accepted replacement sales order lines

Upon posting, the system will automatically update all sales lines, saving a lot of work compared to manual adjustments.

Click on the navigation menu item **Post**

[illegible]

Sales lines will be updated

The screenshot displays the 'Requirement Worksheet' in Dynamics 365 Business Central. The table lists various requirements, including those for 'New Item No. 10004 0000000001' and 'In Purchase Order'. A modal dialog box is open, asking 'Do you want to post the Requirement #RP\_000001?'. The 'Yes' button is highlighted, indicating the user's intention to post the requirement.

#### 5.1.2.4.3.3. Check sales difference entries

It's possible to check the changed sales lines differences in two places

On Replacement page , click on the navigation menu item Sales Differences

The screenshot displays the Dynamics 360 Business Central user interface. At the top, the breadcrumb navigation shows "Dynamics 360 Business Central". The main title bar indicates the current view is "Replacement REPL-000003". Below this, there are tabs for "Calculation Worksheet", "Worksheet", "Related", "Automatic", and "Trace Logically". A red box highlights the "To Line Differences" button under the "Related" tab.

The "General" section contains the following fields:

- No.:** REPL-000003
- Description:**
- Season Code:** 202803
- Status:** Finished

A tooltip message states: "The selected field reflects which kit applies to the replacement." Below the general information, there are sections for "Lines", "New Line", and "Delete Line".

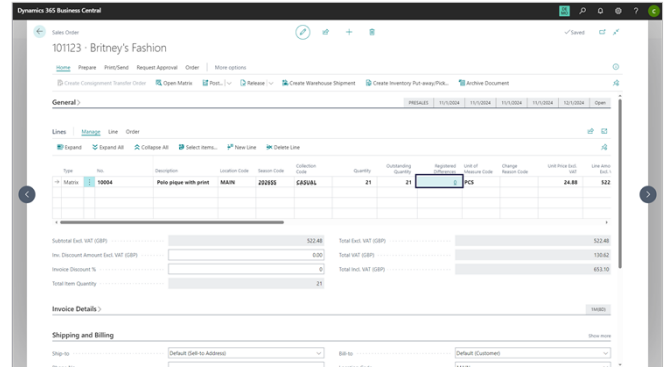
The "Lines" section shows a table with columns: Item No., Item Description, Unit Code, Size Code, Joint Size Code, New Item No., New Item Code, New Item Code, and Remark Code. The table lists three replacement lines:

Item No.	Item Description	Unit Code	Size Code	Joint Size Code	New Item No.	New Item Code	New Item Code	Remark Code
10004	Poly pipe with joint	MATBOUT			10004	OFF-SHOTS		REPLACE
10004	Poly pipe with joint	SALMON			10004	PINK		REPLACE
10007	T-shaft pipe unit	BHNC			10007	OFF-SHOTS		REPLACE

### Check Sales Difference Entries

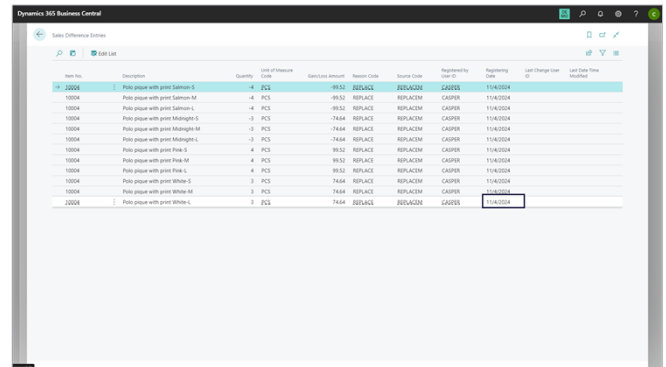
Document	Order	Date	Description	Quantity	Unit of Measure Code	Quantity Entered	Material Amount	Resource Code	Source Code	Reprogram by User ID	Beginning Date	Last Change Date	Last Print Date
Order	191122	19004	Rink plaque with post Fastlane S	-3	PCS	-64.84	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19004	Rink plaque with post white M	1	PCS	4.80	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19004	Rink plaque with post white M	2	PCS	46.76	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19004	Rink plaque with post white M	2	PCS	46.76	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19004	Rink plaque with post white M	2	PCS	46.76	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19004	Rink plaque with post white M	2	PCS	46.76	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19004	Rink plaque with post white M	3	PCS	144.4	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Fast Lane	-2	PCS	-12.70	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Fast Lane	-6	PCS	-64.80	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Fast Lane	-6	PCS	-64.80	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Fast Lane	-6	PCS	-64.80	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Off-white M	2	PCS	51.72	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Off-white M	2	PCS	4.80	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Off-white M	8	PCS	94.88	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191122	19007	T-turret gun use Off-white M	8	PCS	94.88	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-4	PCS	-65.52	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-4	PCS	-65.52	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-4	PCS	-65.52	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-4	PCS	-65.52	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-3	PCS	-14.64	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-3	PCS	-14.64	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-3	PCS	-14.64	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-4	PCS	95.52	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post Fastlane S	-4	PCS	95.52	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post white M	3	PCS	144.4	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	19004	Rink plaque with post white M	3	PCS	144.4	REPLACEMENT		REFCAPTR	CAPTR	1/14/2004	1/14/2004	
Order	191123	20006	Rink plaque with post white M	3	PCS	74.64	REPLACEMENT	REJG02R	REFCAPTR	CAPTR	1/14/2004	1/14/2004	

On sales order line, click in cell Registered Differences



Type	No.	Description	Location Code	Reason Code	Collection Code	Quantity	Outstanding Quantity	Registered Differences	Unit of Measure	Unit Price (USD)	Line Amount (USD)
M	10004	Polo player with print	MAIN	202005	CA5001	21	21	21	PCS	24.88	522

Check Sales Difference Entries

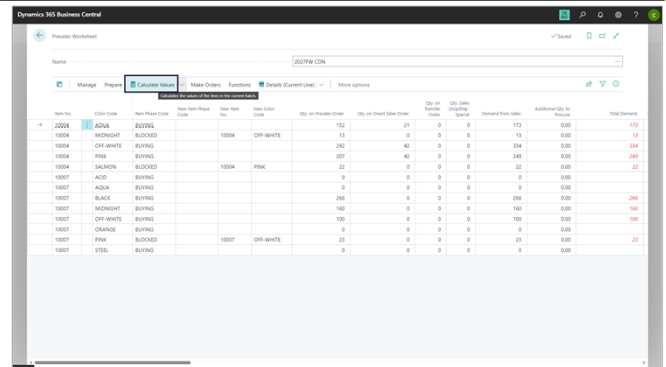


Item No.	Description	Quantity	Unit of Measure	Entered Amount	Reason Code	Source Code	Registered On	Registered Date	Last Change User	Last Date Time Modified
10004	Polo player with print Salmon-L	-4	PCS	99.52	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print Salmon-L	-4	PCS	99.52	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print Mangrove-L	-3	PCS	74.64	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print Mangrove-L	-3	PCS	74.64	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print Mangrove-L	-3	PCS	99.52	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print Pink-M	4	PCS	99.52	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print Pink-L	4	PCS	99.52	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print White-L	3	PCS	74.64	REPLACE	REPLACIN	CA5001	11/4/2024		
10004	Polo player with print White-M	3	PCS	74.64	REPLACE	REPLACIN	CA5001	11/4/2024		
20008	Polo player with print White-L	3	PCS	74.64	REPLACE	REPLACIN	CA5001	11/4/2024		

#### 5.1.2.4.4. Recalculate Values

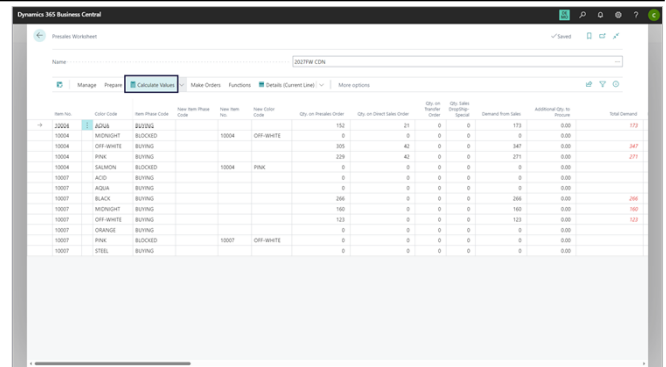
During the use of the presales worksheet, constant recalculation is necessary to reevaluate changed conditions.

Click on the navigation menu button Calculate Values



Item No.	Color Code	New Item Code	New Item Description	New Item Reason Code	Qty on Presales Order	Qty on Direct Sales Order	Qty on Transfer Order	Qty on Pending Order	Qty on Demand Order	Additional Qty to Reserve	Total Demand
10004	ACQUA	202004	BLOCKED		152	0	0	0	0	152	152
10004	MIDNIGHT	10004	BLOCKED		13	0	0	0	0	13	13
10004	OFF-WHITE	10004	BLOCKED		292	42	0	0	0	334	334
10004	PINK	10004	BLOCKED		227	42	0	0	0	269	269
10004	SALMON	10004	BLOCKED		22	0	0	0	0	22	22
10007	ACQUA	10007	BLOCKED		0	0	0	0	0	0	0
10007	BLACK	10007	BLOCKED		266	0	0	0	0	266	266
10007	MIDNIGHT	10007	BLOCKED		160	0	0	0	0	160	160
10007	OFF-WHITE	10007	BLOCKED		120	0	0	0	0	120	120
10007	ORANGE	10007	BLOCKED		0	0	0	0	0	0	0
10007	PINK	10007	BLOCKED		23	0	0	0	0	23	23
10007	STEEL	10007	BLOCKED		0	0	0	0	0	0	0

Check Qty on Presales Order for blocked item colors. All quantities on presales orders are set to 0, as they have been replaced or canceled.



Item No.	Color Code	New Item Code	New Item Description	New Item Reason Code	Qty on Presales Order	Qty on Direct Sales Order	Qty on Transfer Order	Qty on Pending Order	Qty on Demand Order	Additional Qty to Reserve	Total Demand
10004	ACQUA	202004	BLOCKED		152	21	0	0	0	173	173
10004	MIDNIGHT	10004	BLOCKED		13	0	0	0	0	13	13
10004	OFF-WHITE	10004	BLOCKED		292	42	0	0	0	334	334
10004	PINK	10004	BLOCKED		227	42	0	0	0	269	269
10004	SALMON	10004	BLOCKED		22	0	0	0	0	22	22
10007	ACQUA	10007	BLOCKED		0	0	0	0	0	0	0
10007	BLACK	10007	BLOCKED		266	0	0	0	0	266	266
10007	MIDNIGHT	10007	BLOCKED		160	0	0	0	0	160	160
10007	OFF-WHITE	10007	BLOCKED		120	0	0	0	0	120	120
10007	ORANGE	10007	BLOCKED		0	0	0	0	0	0	0
10007	PINK	10007	BLOCKED		23	0	0	0	0	23	23
10007	STEEL	10007	BLOCKED		0	0	0	0	0	0	0

## Toggle per worksheet line

On the Presales Worksheet Templates, default settings can be configured, such as "Include Direct Sales Orders in Calculation," "Calculate with Inventory," and "Use Season as a Filter."

These settings are applied automatically when worksheet lines are created but can be adjusted per worksheet line as needed.

Dynamics 365 Business Central

Preserves Worksheet Templates

Save

Preserves Worksheet Names

More options

Name	Calculate with existing	Include Blank Cells (even if cell is blank)	Include emptying of Empty Rows	Use Blank as a Fill	Calculation type	Qty on Hand (Qty)	Qty on Stock (Qty)	Qty on Order (Qty)	Additional Qty. to Purchase	Qty to Purchase	Expended Balance	Expected Cost
20230704	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		200	125	2,000	0	21	2,999.00	4,582.11
20230305	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		2,413	82	2,094	0	1,989	9,837.24	47,285.0212
20230704	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	50	1,245	100	1,507	0	11	6.00	12,842.88
20230705	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	50	0	0	0	0	0	0.00	0.00

Per worksheet line, these settings can be configured to include or exclude out-of-season sales, to count direct sales orders in total demand, and to include inventory in the overall demand calculation.

[illegible]

### 5.1.3. Additional quantities to purchase or produce

To ensure adequate stock for direct sales after retailers have received their orders, users can increase the quantities to purchase or produce. This is facilitated by a function that allows quantities to be adjusted by a specific factor. This feature helps in maintaining optimal inventory levels, supporting ongoing sales efforts beyond the initial presales phase.

Manufacturers often have minimum order quantities for each color. Users can set the threshold at the item color level, enabling them to monitor if sufficient quantities have been sold per color. The "total demand" column provides a clear visual indication: if the quantity sold is below the threshold, it shows red, signaling that the order threshold has not been met.

If thresholds are used, representing minimum purchase quantities per item color, they can be set individually per item color.

If the intended purchase quantity falls below the threshold, one can decide to add additional quantities or check the 'Ignore Threshold' field.

**Dynamics 365 Business Central**

Previous Worksheet | Save | Print | Refresh

Name: [DYNAMICS] | Filter: [All]

Menu: Manage | Prepare | Calculate Values | Make Orders | Functions | Details (Current Line) | More options

Item No.	Color Code	Qty. on Hand	Purchase Order	Qty. on Order	Total Qty. on Order	Reorder Point	Additional Qty. to Purchase	Total Demand	Order Release Date	Theoretical Changeover	Milieu Threshold	Ignore Threshold	Qty. on Hand, Color	Is Stock Available
→ 2000A	AQUA	152	21	0	173	0.00	173	0	173	86.5	IS	CO	0	0
1000A	MIDNIGHT	0	0	0	0	0.00	0	0	0	0	IS	CO	0	0
1000B	OPI-WHITE	355	42	0	347	0.00	347	200	200	171.5	IS	CO	0	0
1000A	PINK	229	0	0	271	0.00	271	200	200	128.5	IS	CO	0	0
1000T	TARSON	0	0	0	0	0.00	0	0	0	0	IS	CO	0	0
1000T	ACID	0	0	0	0	0.00	0	0	0	0	IS	CO	0	0
1000T	AQUA	0	0	0	0	0.00	0	0	0	0	IS	CO	0	0
1000T	BLACK	264	0	0	264	0.00	264	200	200	138	IS	CO	0	0
1000T	MIDNIGHT	160	0	0	160	0.00	160	200	200	120	IS	CO	0	0
1000T	OPI-WHITE	123	0	0	123	0.00	123	200	200	100	IS	CO	0	0
1000T	ORANGE	0	0	0	0	0.00	0	0	0	0	IS	CO	0	0
1000T	PINK	0	0	0	0	0.00	0	0	0	0	IS	CO	0	0
1000T	STEEL	0	0	0	0	0.00	0	0	0	0	IS	CO	0	0

[illegible]

**Dynamics 365 Business Central**

Previous Worksheet

Name: DUTYFR CON

Management Prepare Calculate Values Make Orders Functions Details (Current Item) More options

Item No.	Color Code	Qty. on Hand	Qty. on Order	Qty. in Stock	Qty. in Transit	Reserved From Sale	Average Cost USD/CU YD	Total Demand	Order Threshold	Threshold Change	Below Threshold	Ignore Threshold	Qty. on Hand, Order	Qty. in Transit, Order
→ 1000A	ACQUA	152	21	0	0	171	152	172	200	88.5	0	CI	0	0
1000A	MIDNIGHT	0	0	0	0	0.00			200	0	0	CI	0	0
1000A	OPI WHITE	955	42	0	0	347	9.00	347	200	171.5	0	CI	0	0
1000A	PINK	229	0	0	0	271	0.00	271	200	135.5	0	CI	0	0
1000T	VAGBORN	0	0	0	0	0.00			200	0	0	CI	0	0
1000T	ACQUA	0	0	0	0	0.00			0	0	0	CI	0	0
1000T	ACQUA	0	0	0	0	0.00			0	0	0	CI	0	0
1000T	BLACK	264	0	0	0	266	0.00	266	0	0	0	CI	266	0
1000T	MIDNIGHT	160	0	0	0	160	0.00	160	0	0	0	CI	160	0
1000T	OPI WHITE	123	0	0	0	123	0.00	123	0	0	0	CI	120	0
1000T	ORANGE	0	0	0	0	0.00			0	0	0	CI	0	0
1000T	PINK	0	0	0	0	0.00			0	0	0	CI	0	0
1000T	STEEL	0	0	0	0	0.00			0	0	0	CI	0	0

**Dynamics 365 Business Central**

File Edit View Settings Help

Available Workbooks

2023FAR CEN

Name

Manager Properties Calculate Values Make Orders Functions Details (Current Line) More options

2023FAR CEN

Item No.	Order Code	Qty on Hand Product	Qty on Hand Sales Order	Qty. Stock Inventory	Allocated Inventory	Allocated Sales Order	Additional Qty. To Purchase	Total Threshold	Order Threshold	Threshold Strategy	Min. Threshold	Ignore Threshold	Qty. on Hand Product	Qty. Stock Inventory
10004	AGDA	152	21	0	0	173	\$2.00	223	200	1115	0	0	0	0
10004	MIDWEST	0	0	0	0	0	0.00	200	0	0	0	0	0	0
10004	OFF-WHITE	342	42	0	0	347	60.00	407	200	200.5	0	0	0	0
10004	PRND	233	42	0	0	275	200.00	281	200	100.5	0	0	0	0
20004	AGDA	0	0	0	0	0	0.00	200	0	0	0	0	0	0
10007	ALCO	0	0	0	0	0	0.00	0	0	0	0	0	0	0
10007	AGDA	0	0	0	0	0	0.00	0	0	0	0	0	0	0
10007	BLACK	256	0	0	0	266	0.00	266	0	0	0	0	256	0
10007	MIDWEST	160	0	0	0	160	0.00	160	0	0	0	0	0	0
10007	OFF-WHITE	133	0	0	0	133	0.00	133	0	0	0	0	133	0
10007	CANADA	0	0	0	0	0	0.00	0	0	0	0	0	0	0
10007	PRND	0	0	0	0	0	0.00	0	0	0	0	0	0	0
10007	STYL	0	0	0	0	0	0.00	0	0	0	0	0	0	0





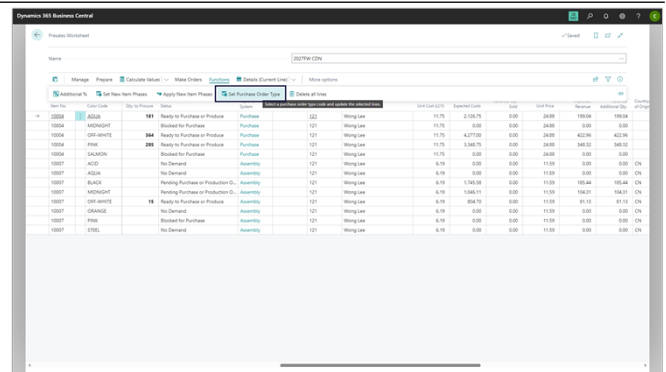
It is possible to use the 'Set new Item Phase' function to apply a selected item phase for multiple items in the worksheet.

[illegible][illegible][illegible][illegible]

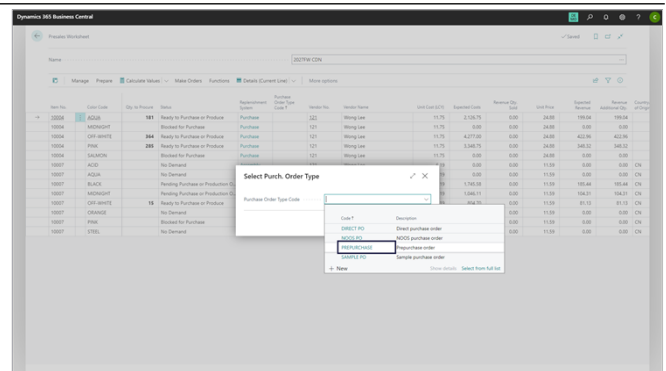
### 5.1.3.3. Create purchase orders

When the status in the worksheet lines is 'Ready to Purchase or Produce', the purchase orders can be created for the quantities to procure.

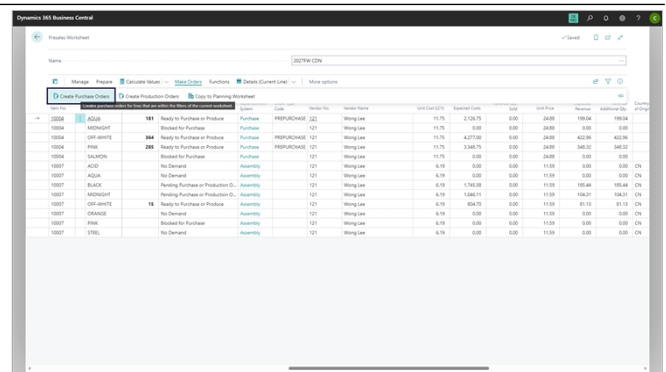
Click on the navigation menu item **Set Purchase Order Type**



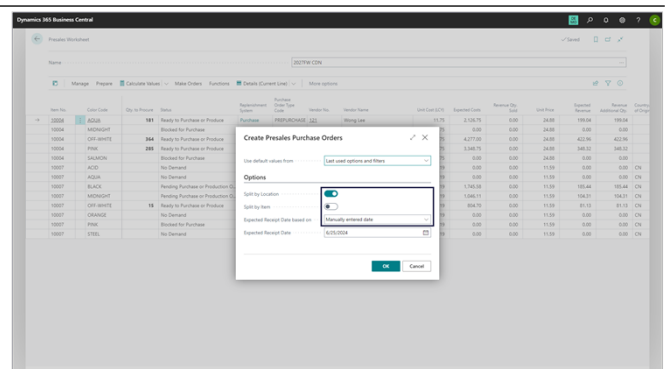
Select a purchase order type



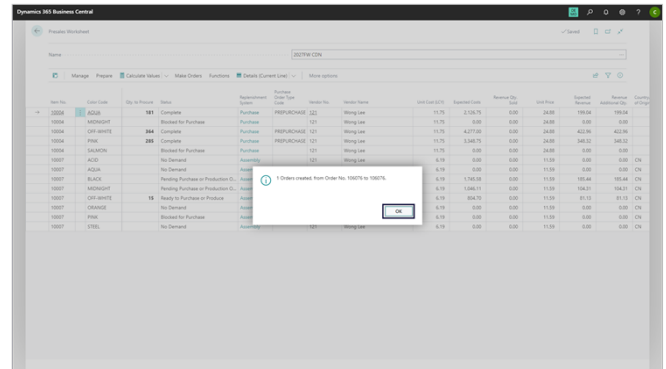
Click on the navigation menu item **Create Purchase Orders**



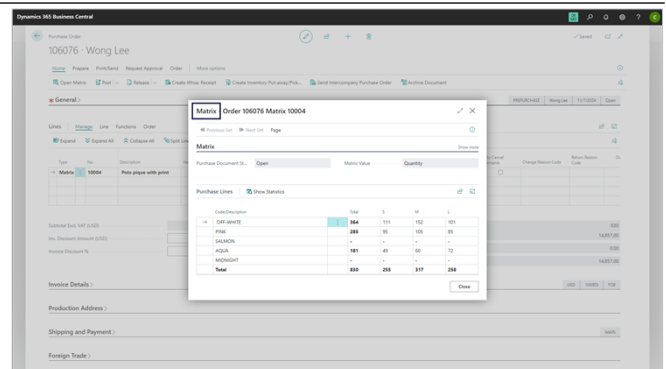
Choose whether you want a purchase order created per location or per item  
The Expected Receipt Date can be based on the starting date of the delivery drop or manually entered



A purchase order has been created



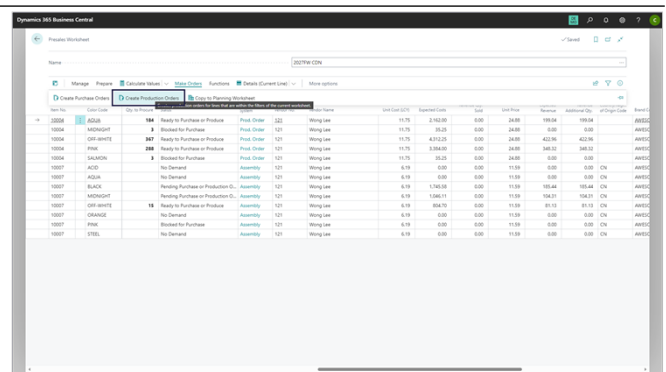
Check the created purchase order. In the matrix, the ordered quantities can be found for each color-size combination.



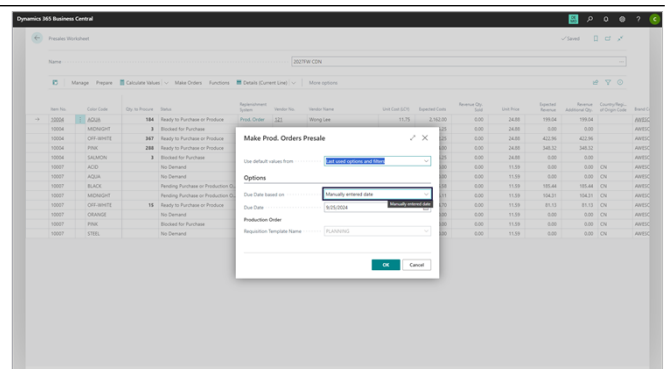
#### 5.1.3.4. Create production orders

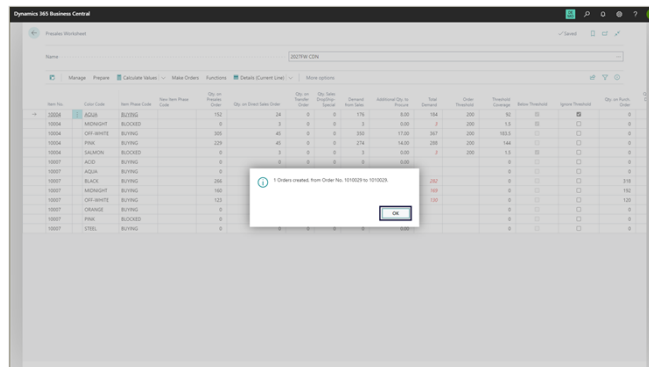
When the status in the worksheet lines is 'Ready to Purchase or Produce', the production orders can be created for the quantities to procure.

Click on the navigation menu item **Create Production Orders**

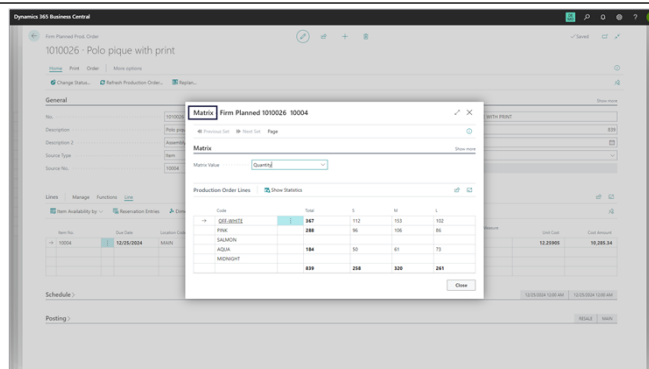


Choose whether you want the Due Date based on the starting date of the delivery drop or manually entered



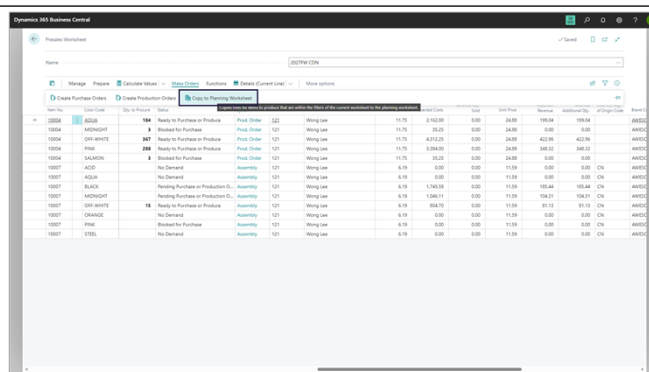


Check the created production order. In the matrix, the ordered quantities can be found for each color-size combination.

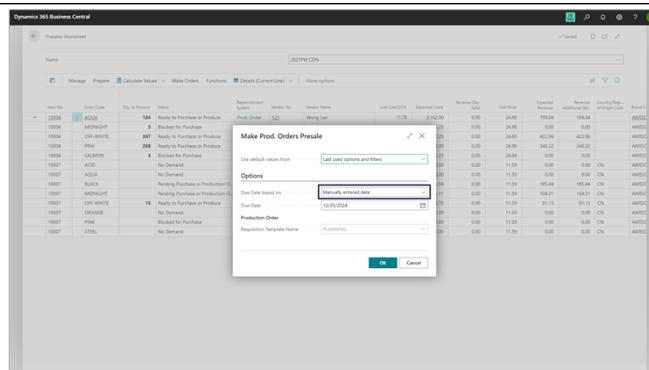


When the status in the worksheet lines is 'Ready to Purchase or Produce', the production orders can be created for the quantities to procure.

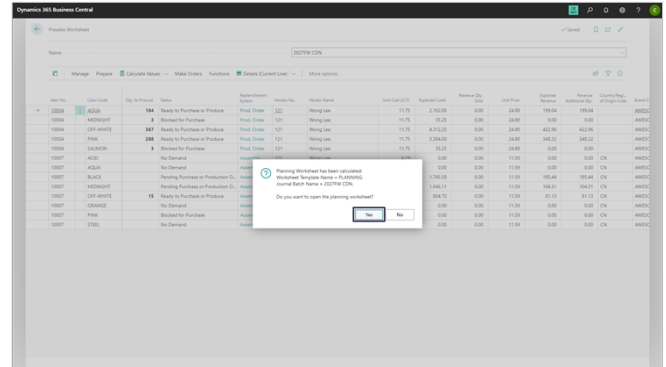
Click on the navigation menu item **Copy to Planning Worksheet**



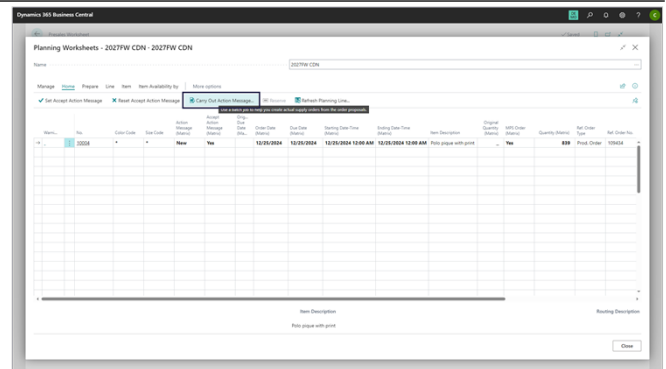
Choose whether you want the Due Date based on the starting date of the delivery drop or manually entered



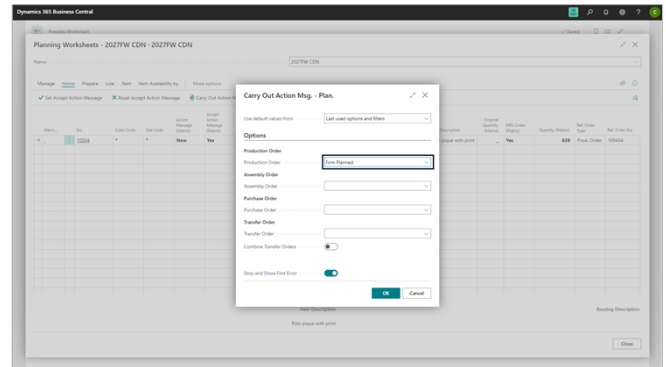
Choose whether you want to open the planning worksheet



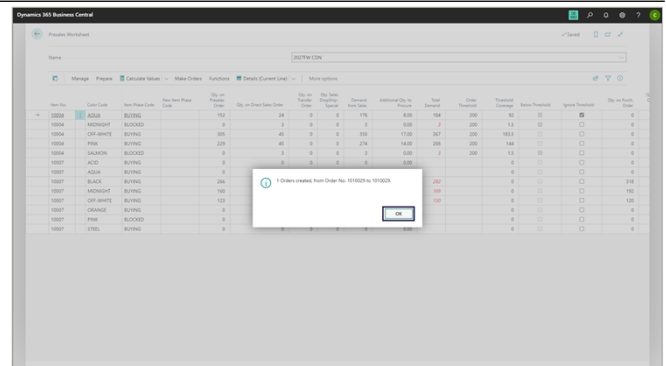
Click on the navigation menu item **Carry Out Action Message...**



Choose whether you want a planned, firm planned production order, firm planned & print, or copy to requisition worksheet



A firm planned production order has been created



## 5.1.4. Conclusion

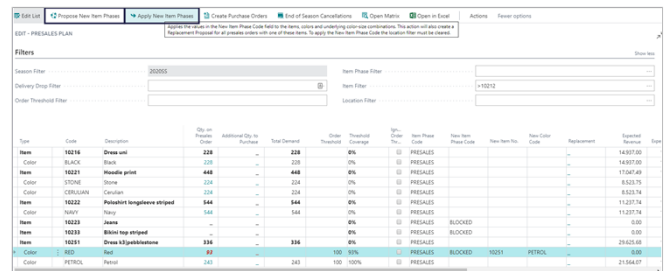
The presales plan functionality in K3 Pebblestone on Microsoft Business Central revolutionizes presales management for fashion brands. By offering detailed tracking, extensive filtering options, and critical financial insights, it empowers users to efficiently manage their parts of each seasonal collection, ensuring market demand is met and production constraints are effectively handled. This advanced tool not only enhances operational efficiency but also supports strategic decision-making, contributing to the overall success and profitability of fashion brands.



## 5.2. Replacement and cancellation by wholesaler

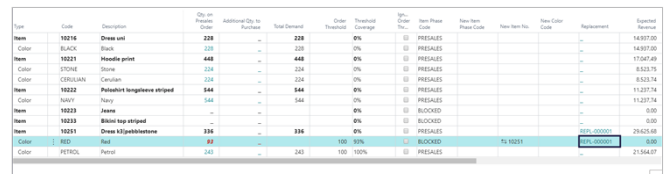
### 5.2.1. Replacement proposal

- Click on the navigation menu item **Propose New Item Phases**.  
The new Item Phase is proposed.
- When you want to replace items because minimum has not been reached, enter this first. Click on the navigation menu item **Apply New Item Phases**.



### 5.2.2. Replacement

- Click on the **Replacement** number in cell **Replacement**.  
The replacement worksheet will open.



### 5.2.3. Replacement worksheet

- No.**  
Replacement Worksheet document No.
- Description.**  
Specifies the replacement worksheet description.
- Reason Code.**  
Specifies the reason code for the replacement worksheet.
- Status New In progress Finished.**  
Specifies whether the document is new, in progress, or has been finished.



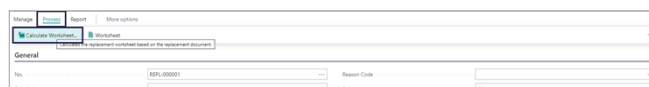
- Replacement Method.**  
Indicates whether the item, color and/or size on the line will be replaced or cancelled.
- Price Adjustment.**



- Indicates whether a price charge is applicable or that the current prices will be remained.
3. **Recalculate Shipment Date.**  
Indicates whether the shipment date will be recalculated or that the current shipment date on the order lines will be remained.
  4. **Item No.**  
Specifies the number of the item on the replacement line that will be replaced or cancelled.
  5. **Item Description.**  
Specifies a description of the item on the replacement line that will be replaced or cancelled.
  6. **Color Code.**  
Specifies the code of the color on the replacement line that will be replaced or cancelled.
  7. **Size Code.**  
Specifies the code of the size on the replacement line that will be replaced or cancelled .
  8. **2nd Size Code.**  
Specifies the code of the additional size, for example waist or inseam for the item on the replacement line that will be replaced or cancelled.
  9. **New Item No.**  
Specifies the number of the item that will replace the item selected in the Item No. field.
  10. **New Color Code.**  
Specifies the code of the color that will replace the color selected in the Color Code field.
  11. **New Size Code.**  
Specifies the code of the size that will replace the size selected in the Size Code field.
  12. **New 2nd Size Code.**  
Specifies the code of the additional size, for example waist or inseam for the item that will replace the size selected in the 2nd Size Code field.
  13. **Reason Code.**  
Specifies the reason code, a supplementary source code that enables you to identify the reason for the replacement or cancellation on this line.

## 5.2.4. Calculate Worksheet

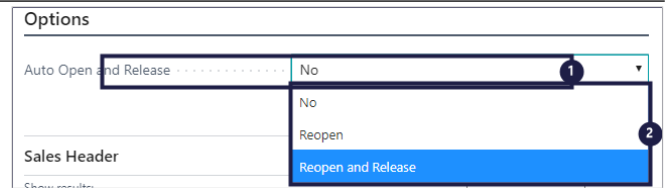
- Click on the navigation menu item popup **Process**.
- Click on the navigation menu item **Calculate Worksheet...**



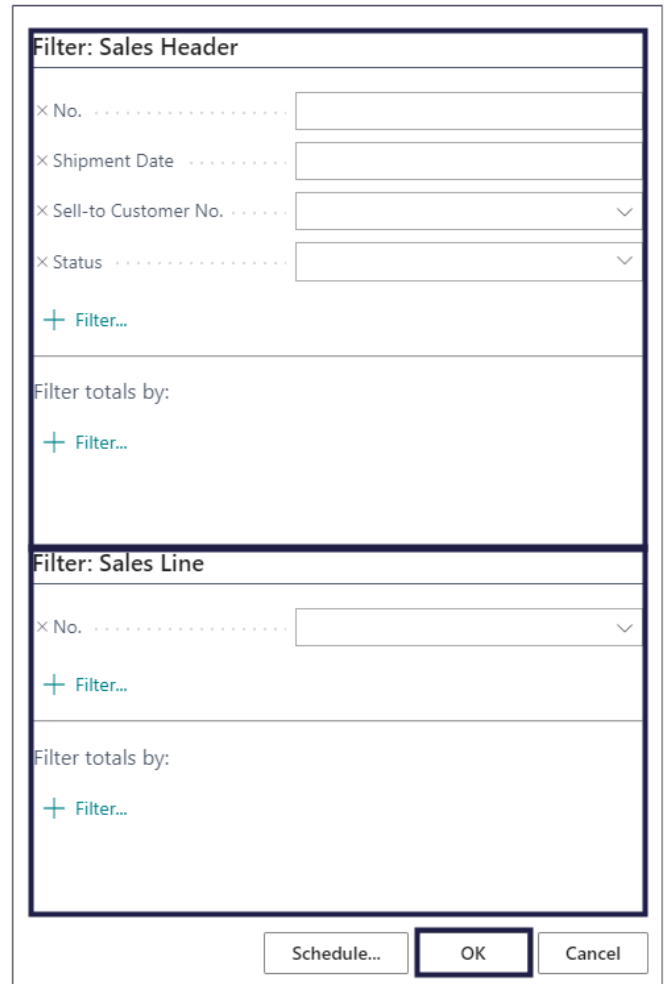
The screenshot shows a web application interface for the 'Calculate Worksheet' function. At the top, there are tabs for 'Calculate Worksheet' and 'Worksheet'. Below the tabs, there is a 'General' section with several input fields: 'No.' (containing 'RPL-000001'), 'Reason Code', 'Description', 'Status', and 'View'. A small message at the top right says 'Calculate Worksheet based on the replacement documents'.

The edit calculate worksheet will open.

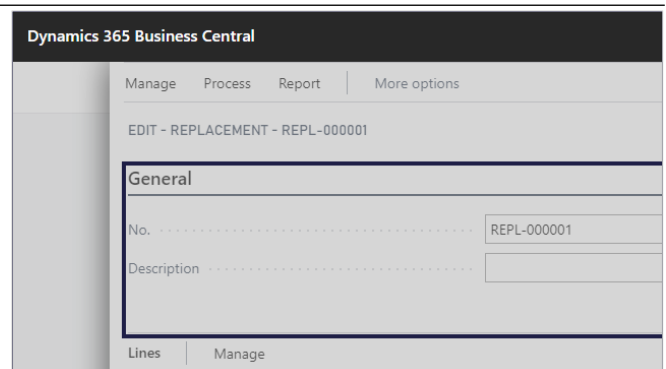
1. Move the mouse to **Auto Open and Release No Reopen Reopen and Release**.
2. Choose if you want to **Reopen and Release** the order.



- If needed choose the right filters for Sales Header.
- If needed choose the right filters for Sales Line.
- Click on the button **OK**.

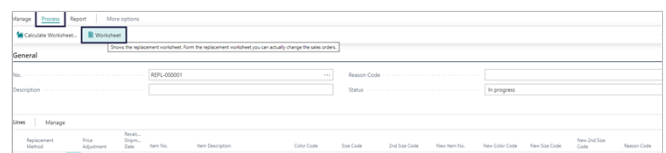


The status changed into, in progress.



## 5.2.5. Worksheet





- Click on the navigation menu item popup **Process**.
- Click on the navigation menu item **Worksheet**. The calculated worksheet will open.









### Accept

Indicates whether to accept the proposed changes for this line.

Replacement No. ....	
Manage  Post  Refresh Accept  Force Accept  Print...	
Accept	Reason not Accepted
→ <input type="checkbox"/>	New Item No. 10251 0000000002 has already been order
<input type="checkbox"/>	New Item No. 10251 0000000003 has already been order
<input type="checkbox"/>	New Item No. 10251 0000000004 has already been order
<input type="checkbox"/>	New Item No. 10251 0000000005 has already been order
<input type="checkbox"/>	New Item No. 10251 0000000006 has already been order
<input type="checkbox"/>	New Item No. 10251 0000000002 has already been order
<input type="checkbox"/>	New Item No. 10251 0000000003 has already been order



### Reason not Accepted

Specifies a code to explain why you don't want to accept the proposed changes for this line.

Replacement No. ....	
Manage  Post  Refresh Accept  Force Accept  Print...   More c	
Accept	Reason not Accepted
→ <input type="checkbox"/>	New Item No. 10251 0000000002 has already been ordered by customer 200
<input type="checkbox"/>	New Item No. 10251 0000000003 has already been ordered by customer 200
<input type="checkbox"/>	New Item No. 10251 0000000004 has already been ordered by customer 200
<input type="checkbox"/>	New Item No. 10251 0000000005 has already been ordered by customer 200
<input type="checkbox"/>	New Item No. 10251 0000000006 has already been ordered by customer 200
<input type="checkbox"/>	New Item No. 10251 0000000002 has already been ordered by customer 201
<input type="checkbox"/>	New Item No. 10251 0000000003 has already been ordered by customer 201


### Document No.

Specifies the number of the sales order that represents the line.

REPL-000001	
Accept  Force Accept  Print...   More options	
	Document No. ↑
0000000002 has already been ordered by customer	2007
0000000003 has already been ordered by customer	2007
0000000004 has already been ordered by customer	2007
0000000005 has already been ordered by customer	2007
0000000006 has already been ordered by customer	2007
0000000002 has already been ordered by customer	2011
0000000003 has already been ordered by customer	2011

### Document Line No.

Specifies the line number of the sales order line.

REPL-000001	
Accept  Print...   More options	
	Document No. ↑
ready been ordered by customer	2007
ready been ordered by customer	75000
ready been ordered by customer	75000
ready been ordered by customer	75002
ready been ordered by customer	75003
ready been ordered by customer	75004
ready been ordered by customer	2011
ready been ordered by customer	75000
ready been ordered by customer	75001

### Replacement Method

Indicates whether the item, color and/or size on the line will be replaced or cancelled.

REPL-000001						
Print... More options						
	Document No. ↑	Document Line No. ↑	Replaceme... Method	Price Adjustment	Recalculate Shipment Date	Aut
ered by customer	2007	75000	Replace	Original	<input type="checkbox"/>	No
ered by customer	2007	75001	Replace	Replace	<input type="checkbox"/>	No
ered by customer	2007	75002	Replace	Original	<input type="checkbox"/>	No
ered by customer	2007	75003	Replace	Original	<input type="checkbox"/>	No
ered by customer	2007	75004	Replace	Original	<input type="checkbox"/>	No
ered by customer	2011	75000	Replace	Original	<input type="checkbox"/>	No
ered by customer	2011	75001	Replace	Original	<input type="checkbox"/>	No

### Price Adjustment

Indicates whether a price charge is applicable or that the current prices will be remained.

REPL-000001

More options

Document No. ↑	Document Line No. ↑	Replaceme... Method	Price Adjustment	Recalculate Shipment Date	Auto Reopen and Re
ner 2007	75000	Replace	Original	<input type="checkbox"/>	No
ner 2007	75001	Replace	Original	Original <input type="checkbox"/>	No
ner 2007	75002	Replace	Original	<input type="checkbox"/>	No
ner 2007	75003	Replace	Original	<input type="checkbox"/>	No
ner 2007	75004	Replace	Original	<input type="checkbox"/>	No
ner 2011	75000	Replace	Original	<input type="checkbox"/>	No
ner 2011	75001	Replace	Original	<input type="checkbox"/>	No

### Recalculate Shipment Date

Indicates whether the shipment date will be recalculated or that the current shipment date on the order lines will be remained.

REPL-000001						
No. ↑	Document Line No. ↑	Replaceme... Method	Price Adjustment	Recalculate Shipment Date	Auto Reopen and Release	Item No.
	75000	Replace	Original	<input type="checkbox"/>	No	10251
	75001	Replace	Original	<input type="checkbox"/>	No	10251
	75002	Replace	Original	<input type="checkbox"/>	No	10251
	75003	Replace	Original	<input type="checkbox"/>	No	10251
	75004	Replace	Original	<input type="checkbox"/>	No	10251
	75000	Replace	Original	<input type="checkbox"/>	No	10251
	75001	Replace	Original	<input type="checkbox"/>	No	10251

### Auto Reopen and Release

Indicates whether the sales order will be automatically reopened and replaced to apply the replacement

nt ↑	Replaceme... Method	Price Adjustment	Recalculate Shipment Date	Auto Reopen and Release	Item No.	Variant Co
0	Replace	Original	<input type="checkbox"/>	No	10251	0000000
1	Replace	Original	<input type="checkbox"/>	No	10251	0000000
2	Replace	Original	<input type="checkbox"/>	No	10251	0000000
3	Replace	Original	<input type="checkbox"/>	No	10251	0000000
4	Replace	Original	<input type="checkbox"/>	No	10251	0000000
0	Replace	Original	<input type="checkbox"/>	No	10251	0000000
1	Replace	Original	<input type="checkbox"/>	No	10251	0000000

**Item No.**

Specifies the number of the item on the line that will be replaced or cancelled.

Item No.	Variant Code	Variant Description
10251	0000000008	Dress k3 pebblestone
10251	10251 00000009	Dress k3 pebblestone
10251	0000000010	Dress k3 pebblestone
10251	0000000011	Dress k3 pebblestone
10251	0000000012	Dress k3 pebblestone
10251	0000000008	Dress k3 pebblestone
10251	0000000009	Dress k3 pebblestone

**Variant Code**

Specifies the code of the item variant on the line that will be replaced or cancelled.

Variant Code	Variant Description
0000000008	Dress k3 pebblestone Red-36
0000000009	Dress k3 pebblestone Red-38
0000000010	Dress k3 pebblestone Red-40
0000000011	Dress k3 pebblestone Red-42
0000000012	Dress k3 pebblestone Red-44
0000000008	Dress k3 pebblestone Red-36
0000000009	Dress k3 pebblestone Red-38

**Variant Description**

Specifies the description of the item variant on the line that will be replaced or cancelled.

Variant Description	New Item No.	New Variant Code
Dress k3 pebblestone Red-36	10251	0000000002
Dress k3 pebblestone Red-38	10251	0000000003
Dress k3 pebblestone Red-40	10251	0000000004
Dress k3 pebblestone Red-42	10251	0000000005
Dress k3 pebblestone Red-44	10251	0000000006
Dress k3 pebblestone Red-36	10251	0000000002
Dress k3 pebblestone Red-38	10251	0000000003

**New Item No.**

Specifies the number of the item that will replace the item selected in the Item No. field.

Variant Code	Variant Description	New Item No.	New Variant Code	New Variant Description
0000000008	Dress k3 pebblestone Red-36	10251	0000000002	Dress k3 pebblestone
0000000009	Dress k3 pebblestone Red-38	10251	Look up value 03	Dress k3 pebblestone
0000000010	Dress k3 pebblestone Red-40	10251	0000000004	Dress k3 pebblestone
0000000011	Dress k3 pebblestone Red-42	10251	0000000005	Dress k3 pebblestone
0000000012	Dress k3 pebblestone Red-44	10251	0000000006	Dress k3 pebblestone
0000000008	Dress k3 pebblestone Red-36	10251	0000000002	Dress k3 pebblestone
0000000009	Dress k3 pebblestone Red-38	10251	0000000003	Dress k3 pebblestone

### New Variant Code

Specifies the code of the item variant that will replace the item variant selected in the Variant Code field.

REPL-000001			
Print... More options			
Variant Description	New Item No.	New Variant Code	New Variant Description
Dress k3 pebblestone Red-36	10251	0000000002	Dress k3 pebblestone Petrol-36
Dress k3 pebblestone Red-38	10251	0000000003	Look up value pebblestone Petrol-38
Dress k3 pebblestone Red-40	10251	0000000004	Dress k3 pebblestone Petrol-40
Dress k3 pebblestone Red-42	10251	0000000005	Dress k3 pebblestone Petrol-42
Dress k3 pebblestone Red-44	10251	0000000006	Dress k3 pebblestone Petrol-44
Dress k3 pebblestone Red-36	10251	0000000002	Dress k3 pebblestone Petrol-36
Dress k3 pebblestone Red-38	10251	0000000003	Dress k3 pebblestone Petrol-38

### New Variant Description

Specifies the description of the item variant that will replace the item variant selected in the Variant Code field.

REPL-000001			
More options			
Option	New Item No.	New Variant Code	New Variant Description
pebblestone Red-36	10251	0000000002	Dress k3 pebblestone Petrol-36
pebblestone Red-38	10251	0000000003	Dress k3 pebblestone Petrol-38
pebblestone Red-40	10251	0000000004	Dress k3 pebblestone Petrol-40
pebblestone Red-42	10251	0000000005	Dress k3 pebblestone Petrol-42
pebblestone Red-44	10251	0000000006	Dress k3 pebblestone Petrol-44
pebblestone Red-36	10251	0000000002	Dress k3 pebblestone Petrol-36
pebblestone Red-38	10251	0000000003	Dress k3 pebblestone Petrol-38

### Outstanding Quantity

Specifies how many units on the order line have not yet been shipped.

New Variant Code	New Variant Description	Outstanding Quantity	Reason Code	Order Status	Sp Or
0000000002	Dress k3 pebblestone Petrol-36	1	REPLACE	Open	
0000000003	Dress k3 pebblestone Petrol-38	2	REPLACE	Open	
0000000004	Dress k3 pebblestone Petrol-40	2	REPLACE	Open	
0000000005	Dress k3 pebblestone Petrol-42	3	REPLACE	Open	
0000000006	Dress k3 pebblestone Petrol-44	3	REPLACE	Open	
0000000002	Dress k3 pebblestone Petrol-36	1	REPLACE	Open	
0000000003	Dress k3 pebblestone Petrol-38	1	REPLACE	Open	

### Reason Code

Specifies the Reason Code that reflects why the cancellation or replacement occurred.

New Variant Description	Outstanding Quantity	Reason Code	Order Status	Special Order	Drop Shipment
Dress k3 pebblestone Petrol-36	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3 pebblestone Petrol-38	2	REPLACE	Look up value	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3 pebblestone Petrol-40	2	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3 pebblestone Petrol-42	3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3 pebblestone Petrol-44	3	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3 pebblestone Petrol-36	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>
Dress k3 pebblestone Petrol-38	1	REPLACE	Open	<input type="checkbox"/>	<input type="checkbox"/>

REPLACEMENT WORKSHEET | WORK DATE: 18-12-2018

Replacement No. REPL-000001

Manage ☒ Item ☒ Refresh Actual ☒ Force Assign ☐ Print... ☐ More options

Reason not accepted

	Document No. #	Replacement Reason	Reason Alignment	Auto Register and Release	Item No.	Variant Code	Variant Description
Reason not accepted	75000	Replace	Original	No	12151	0000000000	Dress 4-Sleeved
✓	75001	Replace	Original	No	12151	0000000000	Dress 4-Sleeved
✓	75002	Replace	Original	No	12151	0000000000	Dress 4-Sleeved
✓	75003	Replace	Original	Yes	12151	0000000001	Dress 4-Sleeved

- Click on the button **Yes**.

...t the Replacement REPL-000001?

**Yes** **No**

75003	Replace	Original
75004	Replace	Original

- The replacement has been booked.

REPLACEMENT WORKSHEET WORK DATE: 16-1-2018

Replacement No. \_\_\_\_\_

Manage **Print** Refresh Accept ✓ Home Accept ✓ Print... More options

Accept	Reason not Accepted	Document No. T	Document Line No. T	Replacement Method	Price Adjustment	Replacement Document Date	Auto Request and Release	Item No.	Variant Code	Variant Description
(There is nothing to show in this card)										

- The status changed into, finished.

Manage Process Report More options

EDIT - REPLACEMENT - REPL-000001

General	
No.	REPL-000001
Description	
Reason Code	
Status	Finished

## 5.3. Requisition Worksheet

### 5.3.1. Navigate to Requisition Worksheet

- Click on the navigation menu item popup **Purchase**.
- Click on the navigation menu item **Requisition Worksheet**.

K3pebblestone Demo | Item Management | Sales | **Purchase** | Logistics | Finance | Analysis | Administration

All Orders Vendors Contacts Posted Receipts **Requisition Worksheet**

### 5.3.2. Calculate plan

- Click on the navigation menu item popup **Process**.
- Click on the navigation menu item **Calculate Plan...**

REQUISITION WORKSHEET

Remember your work date is 5/11/2020. Use today | Change No. | Turn off reminder

Name: \_\_\_\_\_

Process Manage **Calculate Plan** Report Drop Shipment Special Order Line Item Availability by Actions Navigate Report Power options

Calculate Plan **Calculate Plan** Carry Out Action Manage

Tip: Use the calculator to help you calculate a supply plan for items and establishing only that have the Requisition System set to Purchase or Supply.

Quantity	Release Code	Class Code	Date	Class Code	Vendor No.	Vendor Item No.	Requisition System
----------	--------------	------------	------	------------	------------	-----------------	--------------------

## K3 Pebblestone

1. **Starting Date.**  
Specifies the date to use for new orders. This date is used to evaluate the inventory.
2. **Ending Date.**  
Specifies the date where the planning period ends. Demand is not included beyond this date.
3. **Use Forecast.**  
Specifies a forecast that should be included as demand when running the planning batch job.
4. **Exclude Forecast Before.**  
Specifies how much of the selected forecast to include, by entering a date before which forecast demand is not included.
5. **Respect Planning Parameters for Supply Triggered by Safety Stock.**  
Specifies that planning lines triggered by safety stock will respect the following planning parameters: Reorder Point, Reorder Quantity and Maximum Inventory in addition to all order modifiers. If you do not select this check box, planning lines triggered by safety stock will only cover the exact demand quantity.
6. Choose the filters, if needed.
7. Click on the button **OK**.

CALCULATE PLAN - REQ. WKSH.

**Saved Settings**

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

**Options**

Starting Date ..... 1/1/2020

Ending Date ..... 5/30/2020

Use Forecast .....

Exclude Forecast Before .....

Respect Planning Parameters for S... ☐

**Filter: Item**

X No. .... 10003|10010|10025|10026|10029|10031

X Search Description .....

+ Filter...

Filter totals by:

X Location Filter .....

+ Filter...

OK Cancel

The plan is being calculated.

Ending Date ..... 5/30/2020

Use Forecast .....

Exclude Forecast Before .....

Respect Planning Parameters for S... ☐

**Filter: Item**

X No. .... 10003|10010|10025|10026|10029|10031

X Search Description .....

+ Filter...

Working on it...

Calculating the plan...

Item No. 10003

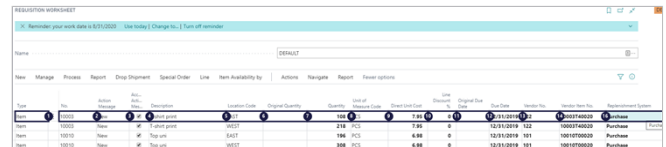
Cancel

The outcome of the calculated plan.

Type	No.	Action Message	Acc... Acti... Mes...	Description
Item	10003	New	<input checked="" type="checkbox"/>	T-shirt print
Item	10003	New	<input checked="" type="checkbox"/>	T-shirt print
Item	10010	New	<input checked="" type="checkbox"/>	Top uni
Item	10010	New	<input checked="" type="checkbox"/>	Top uni
Item	10025	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10025	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10026	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10026	New	<input checked="" type="checkbox"/>	Skirt uni
Item	10029	New	<input checked="" type="checkbox"/>	Short multicoloured
Item	10029	New	<input checked="" type="checkbox"/>	Short multicoloured

## K3 Pebblestone

1. **Type.**  
Specifies the type of requisition worksheet line you are creating.
2. **No.**  
Specifies the number of the involved entry or record, according to the specified number series.
3. **Action Message.**  
Specifies an action to take to rebalance the demand-supply situation.
4. **Accept Action Message.**  
Specifies whether to accept the action message proposed for the line.
5. **Description.**  
Specifies a description of the entry of the product to be sold. To add a non-transactional text line, fill in the Description field only.
6. **Location Code.**  
Specifies a code for an inventory location where the items that are being ordered will be registered.
7. **Original Quantity.**  
Specifies the quantity stated on the production or purchase order, when an action message proposes to change the quantity on an order.
8. **Quantity.**  
Specifies the number of units of the item or resource specified on the line.
9. **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.
10. **Direct Unit Cost.**  
Specifies the cost of one unit of the selected item or resource.
11. **Line Discount %.**  
Specifies the discount percentage that is granted for the item on the line.
12. **Original Due Date.**  
Specifies the date when you can expect to receive the items.
13. **Due Date.**  
Specifies the due date stated on the production or purchase order, when an action message proposes to reschedule an order.
14. **Vendor No.**  
Specifies the number of the vendor who will ship the items in the purchase order.
15. **Vendor Item No.**  
Specifies the number that the vendor uses for this item.
16. **Replenishment System.**



Item	No.	Type	Action Message	Accept Action Message	Description	Location Code	Original Quantity	Quantity	Unit of Measure Code	Direct Unit Cost	Line Discount %	Original Due Date	Due Date	Vendor No.	Vendor Item No.	Replenishment System
Item	1000	Item	✓		Item		100	100	PCS	1.00	0	12/31/2019	12/31/2019	1000000000	1000000000	Purchase
Item	10010	Item	✓		Item		100	100	PCS	1.00	0	12/31/2019	12/31/2019	1000000000	1000000000	Purchase
Item	10010	Item	✓		Item		100	100	PCS	1.00	0	12/31/2019	12/31/2019	1000000000	1000000000	Purchase

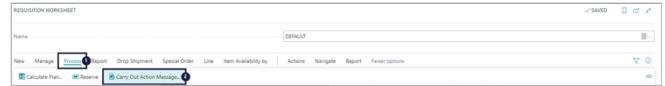


K3 Pebblestone

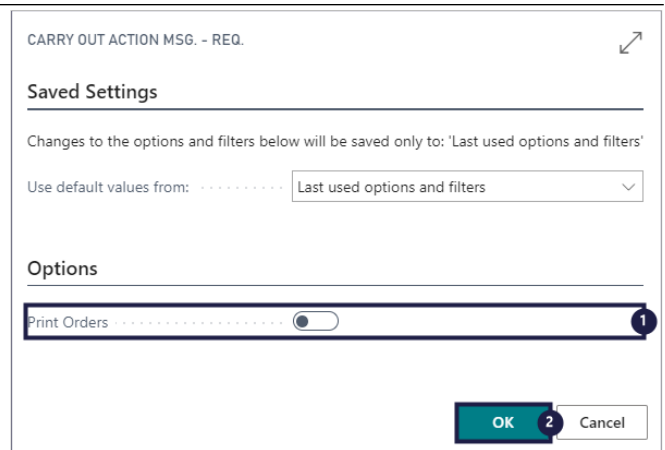
Specifies which kind of order to use to create replenishment orders and order proposals.

### 5.3.3. Creating PO from requisition Worksheet

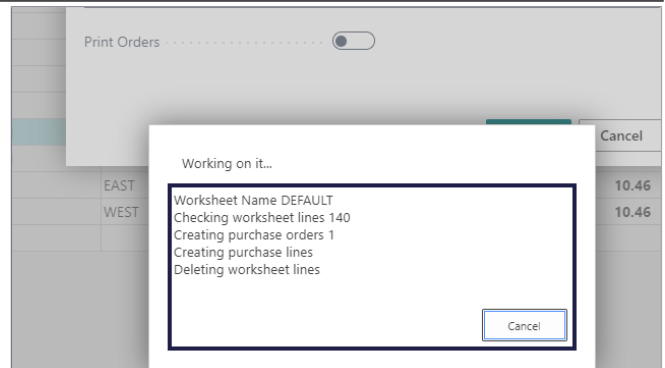
1. Click on the navigation menu item popup **Process**.
2. **Carry Out Action Message...**, Use a batch job to help you create actual supply orders from the order proposals.



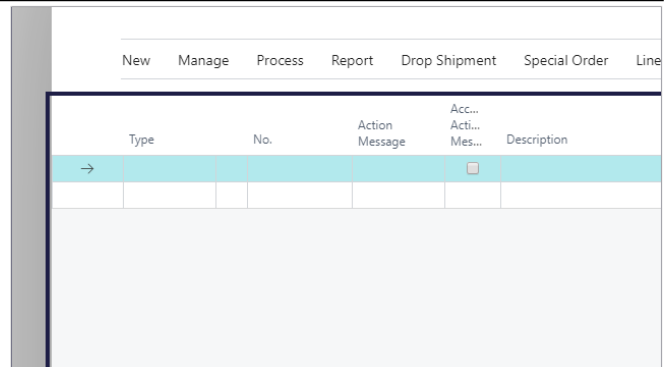
1. **Print Orders.**  
Specifies whether to print the purchase orders after they are created.
2. Click on the button **OK**.



The purchase orders are being created.

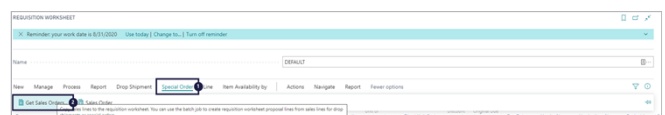


The purchase orders are created, go to the purchase orders.



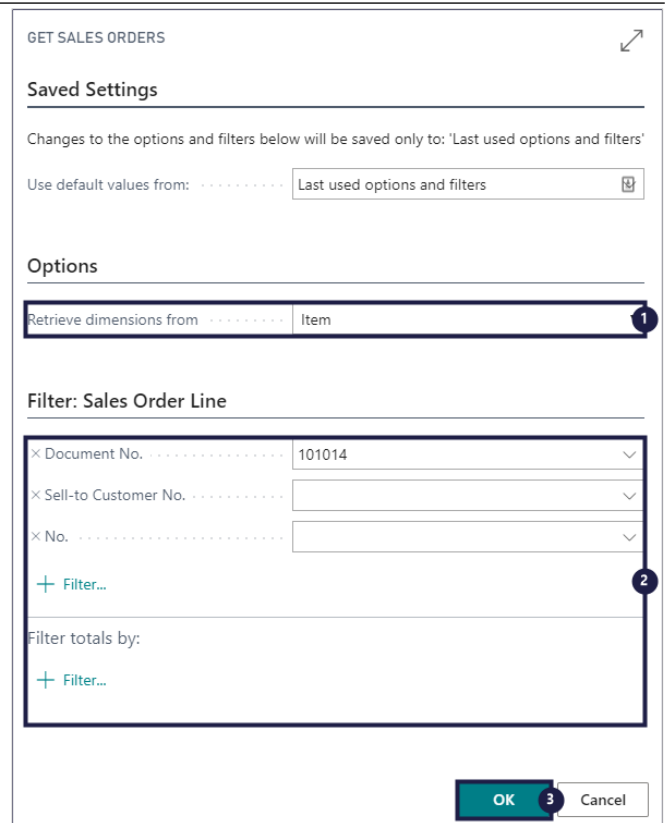
### 5.3.4. Special order

1. Click on the navigation menu item popup **Special Order**.
2. Click on the navigation menu item



### Get Sales Orders...

1. **Retrieve dimensions from Item Sales Line.**  
Specifies the source of dimensions that will be copied in the batch job. Dimensions can be copied exactly as they were used on a sales line or can be copied from the items used on a sales line.
2. Choose the filters, if needed.
3. Click on the button **OK**.



**GET SALES ORDERS**

**Saved Settings**

Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: ..... Last used options and filters

**Options**

Retrieve dimensions from ..... Item 1

**Filter: Sales Order Line**

× Document No. .... 101014 2

× Sell-to Customer No. ....

× No. ....

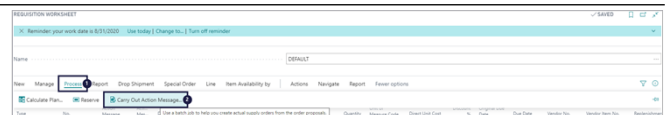
+ Filter...

Filter totals by:

+ Filter...

**OK** 3 Cancel

1. Click on the navigation menu item popup **Process**.
2. **Carry Out Action Message..., Use a batch job to help you create actual supply orders from the order proposals.**

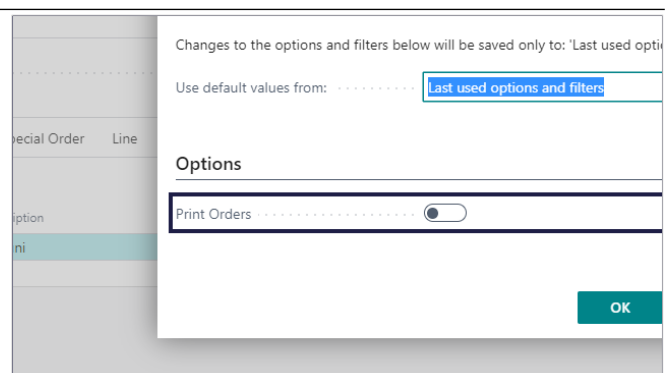


Navigation menu items: Home, Manage, 1 Process, Drop Shipment, Special Order, Line, Item Availability, Actions, Navigator, Report, Footer options.

2 Carry Out Action Message...

### Print Orders

Specifies whether to print the purchase orders after they are created.



Changes to the options and filters below will be saved only to: 'Last used options and filters'

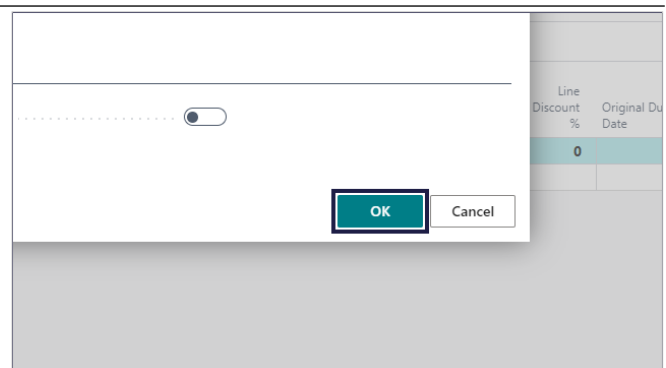
Use default values from: ..... Last used options and filters

**Options**

Print Orders ..... 1

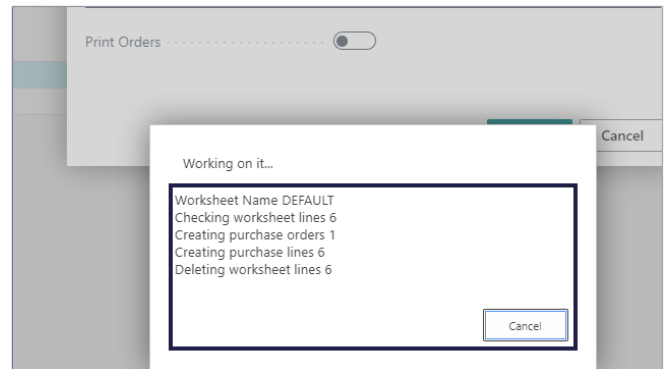
**OK** 2

Click on the button **OK**

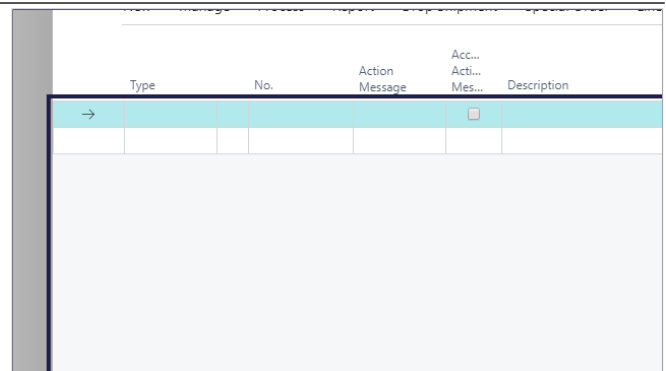


**OK** 1 Cancel

The purchase orders are being created.

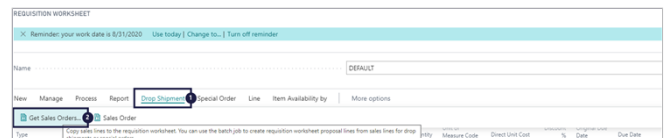


The purchase orders are created, go to the purchase orders.

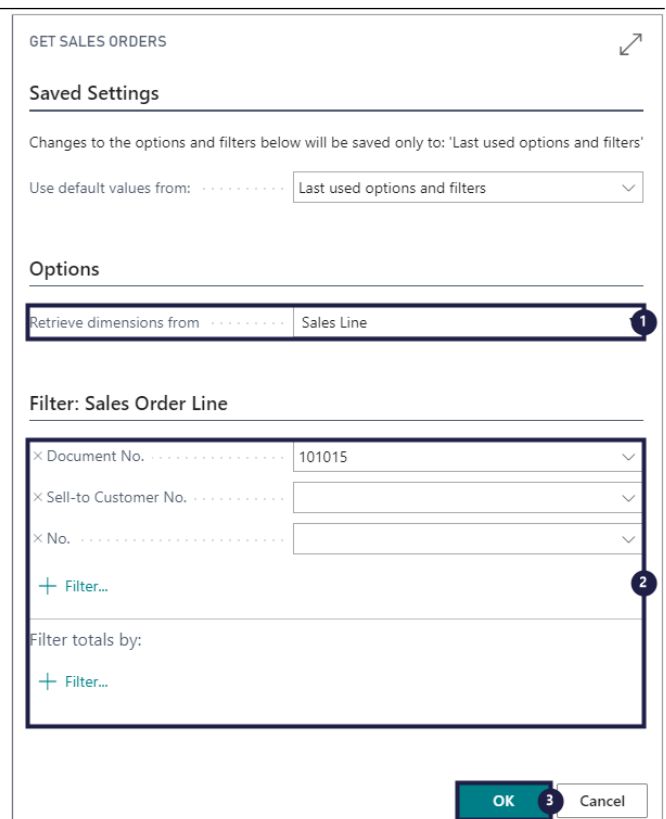


### 5.3.5. Drop Shipment

1. Click on the navigation menu item popup **Drop Shipment**.
2. Click on the navigation menu item **Get Sales Orders...**



1. **Retrieve dimensions from Item Sales Line.**  
Specifies the source of dimensions that will be copied in the batch job. Dimensions can be copied exactly as they were used on a sales line or can be copied from the items used on a sales line.
2. Choose the filters, if needed.
3. Click on the button **OK**.



- REGISTRATION WORKSHEET
- × Reminder your work date is 8/31/2020 Use today | Change to... | Turn off reminder
- Name  DEFAULT
- New Manage **Account** Report Drop Shipment Special Order Line Item Availability | More options
- Calculate Plan... Reserve **Carry Out Action Message**
- Order  Use this field to create actual supply orders from the order proposal.
- | Quantity | Unit of Measure | Drop Ship Date | Drop Ship Location | Drop Ship Name | Drop Ship Address |
|----------|-----------------|----------------|--------------------|----------------|-------------------|
|          |                 |                |                    |                |                   |



Changes to the options and filters below will be saved only to: 'Last used options and filters'

Use default values from: Last used options and filters

### Options

Print Orders ☐


OK



Working on it...

- Worksheet Name DEFAULT
- Checking worksheet lines 7
- Creating purchase orders 1
- Creating purchase lines
- Deleting worksheet lines

Cancel

Type	No.	Action Message	Acc... Acti... Mes...	Description
→				

## 5.4. Item Supply Planning

### 5.4.1. Navigate to Item supply planning

### 5.4.2. Item supply planning

1. Click on the navigation menu item popup **Process**.
2. Click on the link **View supply planning**.

The screenshot shows the K3 Pebblestone Cloud Item Management interface. The 'Process' menu is highlighted, and the 'View supply planning' link is visible under the 'Inventory' section.

1. **Code.**  
Specifies at first level the Item Code, at second and third level it show the Variant Component.
2. **Description.**  
Specifies the description of the Item.
3. **Outstanding Quantity.**  
Specifies how many units of the item are outstanding.
4. **Quantity.**  
Specifies how many units of the item have been specified.
5. **Received Quantity.**  
Specifies how many units of the item are received.
6. **Expected Receipt Date.**  
Specifies the expected receipt date of the item specified on the line.
7. **Requested Receipt Date.**  
Specifies the date that the vendor should to deliver to the ship-to address. The value in the field is used to calculate the latest date you can order the items to have them delivered on the requested receipt date.
8. **Planned Receipt Date.**  
Specifies the date when the item is planned to arrive in inventory.

The screenshot shows the 'ITEM SUPPLY PLANNING' table. The columns are: CODE, DESCRIPTION, OUTSTANDING QUANTITY, QUANTITY, RECEIVED QUANTITY, EXPECTED RECEIPT DATE, REQUESTED RECEIPT DATE, and PLANNED RECEIPT DATE. The table contains data for various items, including 'Dress polo unit'.

### 5.4.3. Item supply planning details

1. Click on the link **Show the details for this item and inbound document**.

The screenshot shows the 'ITEM SUPPLY PLANNING DETAILS' table. The columns are: SOURCE DOCUMENT, DOCUMENT NO., ITEM NO., DESCRIPTION, LOCATION CODE, UNIT OF MEASURE, EXPECTED RECEIPT DATE, REQUESTED RECEIPT DATE, PLANNED RECEIPT DATE, SIZE RANGE CODE, COLOR GROUP CODE, COLOR CODE, and SIZE CODE. The table contains data for various items, including 'Dress polo unit'.

1. **Source Document.**  
Specifies the source type document on the line.
2. **Document No.**  
Specifies the document number on the line.
3. **Item No.**  
Specifies the number of the involved entry or record, according to the specified number series.

The screenshot shows the 'ITEM SUPPLY PLANNING DETAILS' table. The columns are: SOURCE DOCUMENT, DOCUMENT NO., ITEM NO., DESCRIPTION, LOCATION CODE, UNIT OF MEASURE, EXPECTED RECEIPT DATE, REQUESTED RECEIPT DATE, PLANNED RECEIPT DATE, SIZE RANGE CODE, COLOR GROUP CODE, COLOR CODE, and SIZE CODE. The table contains data for various items, including 'Dress polo unit'.

4. **Description.**  
Specifies a description of the item on the line.
5. **Location Code.**  
Specifies the location code of the item specified on the line.
6. **Unit of Measure.**  
Specifies the unit of measure of the item on the line.
7. **Expected Receipt Date.**  
Specifies the expected receipt date of the item specified on the line.
8. **Requested Receipt Date.**  
Specifies the date that the vendor should to deliver to the ship-to address. The value in the field is used to calculate the latest date you can order the items to have them delivered on the requested receipt date.
9. **Planned Receipt Date.**  
Specifies the date when the item is planned to arrive in inventory.  
Forward calculation: planned receipt date = order date + vendor lead time (per the vendor calendar and rounded to the next working day in first the vendor calendar and then the location calendar). If no vendor calendar exists, then: planned receipt date = order date + vendor lead time (per the location calendar). Backward calculation: order date = planned receipt date - vendor lead time (per the vendor calendar and rounded to the previous working day in first the vendor calendar and then the location calendar). If no vendor calendar exists, then: order date = planned receipt date - vendor lead time (per the location calendar).
10. **Size Range Code.**  
Specifies which kind of horizontal components, typically sizes, you want to use for this item. The components in this group are used to create item variants.
11. **Color Group Code.**  
Specifies which kind of vertical components, typically colors, you want to use for this item. The components in this group are used to create item variants.
12. **Color Code.**  
Specifies a code to identify the item vertical component. An item vertical component refers to an element (e.g. color) that is available to this item.
13. **Size Code.**  
Specifies a code to identify the item

horizontal component. An item horizontal component refers to an element (e.g. size) that is available to this item.

1. **Quantity.**  
Specifies how many units of the item have been specified.
2. **Outstanding Quantity.**  
Specifies how many units of the item are outstanding.
3. **Qty. to Invoice.**  
Specifies the quantity to invoice of the item specified on the line.
4. **Qty. to Receive.**  
Specifies the quantity to receive of the item specified on the line.
5. **Outstanding Amount.**  
Specifies the outstanding amount of the item specified on the line.
6. **Quantity Received.**  
Specifies the quantity received of the item specified on the line.
7. **Quantity Invoiced.**  
Specifies the quantity invoiced of the item specified on the line.

QUANTITY	OUTSTANDL... QUANTITY	QTY. TO INVOICE	QTY. TO RECEIVE	OUTSTANDL... AMOUNT	QUANTITY RECEIVED	QUANTITY INVOICED
40	40	40	40	756.00	0	0
46	46	46	46	869.40	0	0
46	46	46	46	869.40	0	0
34	34	34	34	642.60	0	0
26	26	26	26	491.40	0	0
8	8	8	8	151.20	0	0
34	34	34	34	642.60	0	0
46	46	46	46	869.40	0	0
52	52	52	52	982.80	0	0
40	40	40	40	756.00	0	0
20	20	20	20	378.00	0	0

## 6. Logistics

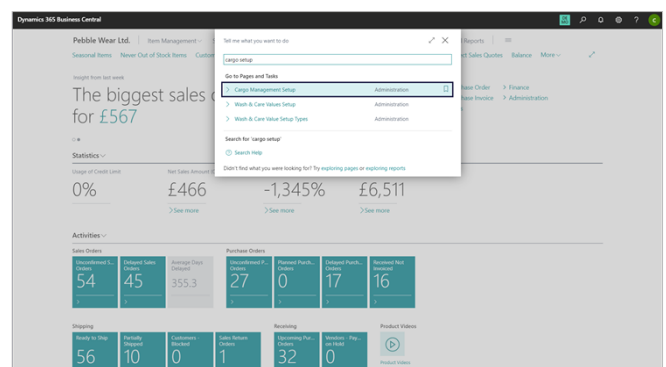
### 6.1. Cargo Management BC25

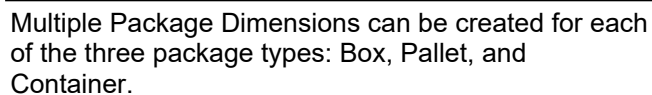
The solution's Cargo Management tools allow businesses to easily oversee, manage, and distribute cargo to warehouses with user-friendly features. Fashion companies can quickly access important information about vendors, transport routes, dates, and other essential documents to ensure smooth operations without any hassle.



#### 6.1.1. Setups

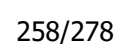
Navigate to Cargo Management Setup





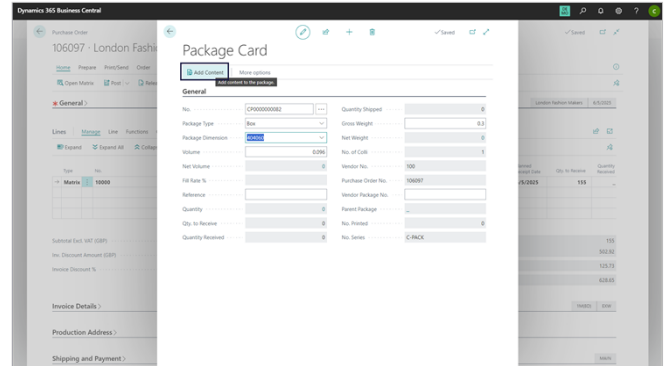
### 6.1.2.1. Add packages to purchase orders manually

From a purchase order, the packages in which the items will be delivered can be specified.

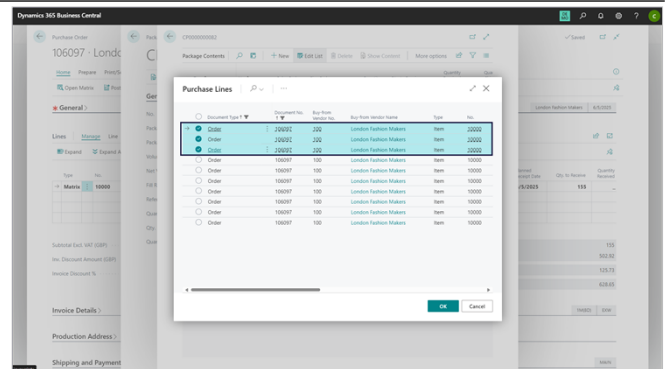




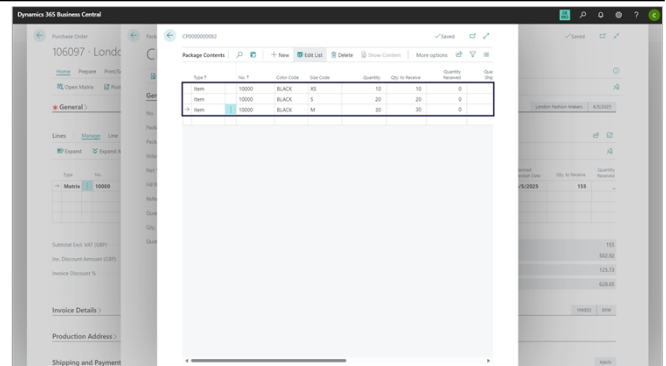
After creating a new package card with the correct attributes, content can be added using a dedicated function.



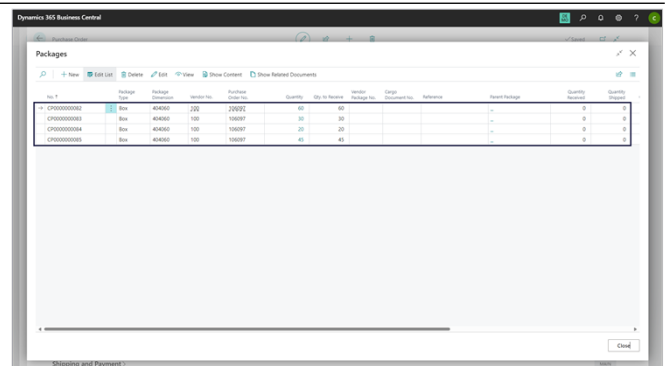
By drilling down on the No. field when Type is set to Item, the desired purchase order lines can be selected to include in the created package.



Items added to the package from the purchase lines become visible in the Package Contents.

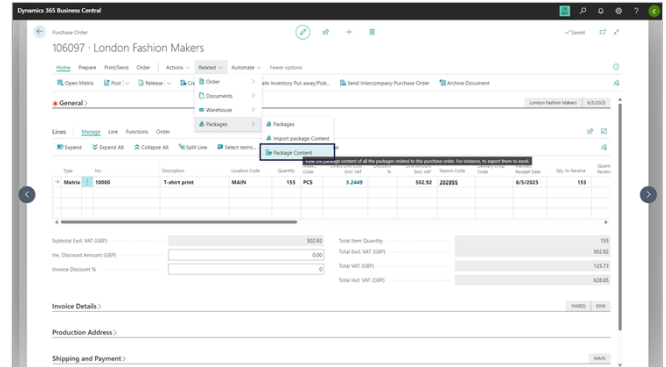


When adding packages to a purchase order, an overview will appear showing all packages and the quantities per package.



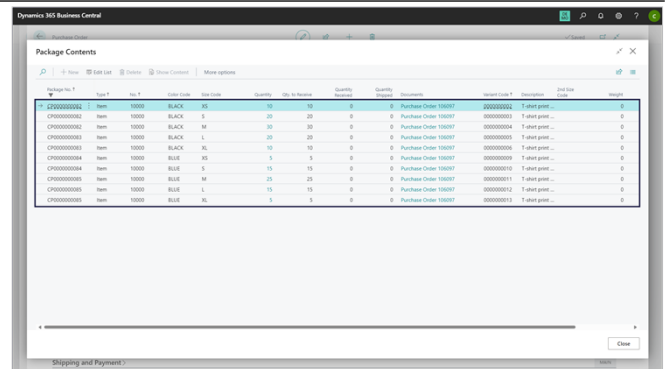
## K3 Pebblestone

It is always possible to access the package content directly from a purchase order at a later time.



The screenshot shows a Dynamics 365 Business Central interface for a Purchase Order (106097) for 'London Fashion Makers'. The 'Package Content' button is highlighted in the top navigation bar. Below the button, a table lists the package contents with columns for Item No., Description, Location Code, Quantity, and Unit. The table shows a total quantity of 155 PCS and a total value of 3,249.92.

The package contents overview shows the package numbers and the quantities per item variant.

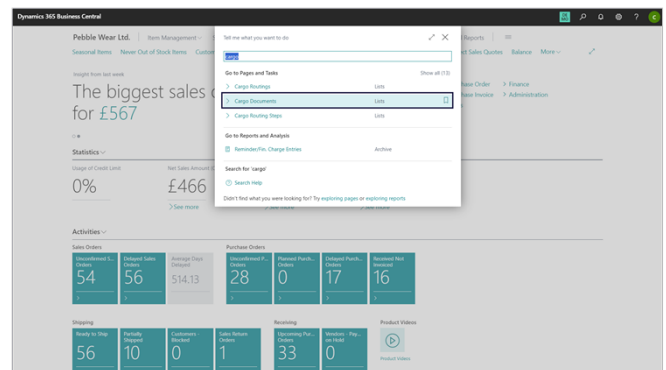


The screenshot shows the 'Package Contents' overview table in Dynamics 365 Business Central. The table lists the package contents with columns for Item No., Description, Location Code, Quantity, and Unit. The table shows a total quantity of 155 PCS and a total value of 3,249.92.

Item No.	Description	Location Code	Quantity	Unit
CP00000001	Item 10000	BLACK	30	PCS
CP00000002	Item 10000	BLACK	30	PCS
CP00000003	Item 10000	BLACK	30	PCS
CP00000004	Item 10000	BLACK	30	PCS
CP00000005	Item 10000	BLACK	30	PCS
CP00000006	Item 10000	BLACK	30	PCS
CP00000007	Item 10000	BLACK	30	PCS
CP00000008	Item 10000	BLACK	30	PCS
CP00000009	Item 10000	BLACK	30	PCS
CP00000010	Item 10000	BLACK	30	PCS
CP00000011	Item 10000	BLACK	30	PCS
CP00000012	Item 10000	BLACK	30	PCS
CP00000013	Item 10000	BLACK	30	PCS
CP00000014	Item 10000	BLACK	30	PCS
CP00000015	Item 10000	BLACK	30	PCS
CP00000016	Item 10000	BLACK	30	PCS
CP00000017	Item 10000	BLACK	30	PCS
CP00000018	Item 10000	BLACK	30	PCS
CP00000019	Item 10000	BLACK	30	PCS
CP00000020	Item 10000	BLACK	30	PCS
CP00000021	Item 10000	BLACK	30	PCS
CP00000022	Item 10000	BLACK	30	PCS
CP00000023	Item 10000	BLACK	30	PCS
CP00000024	Item 10000	BLACK	30	PCS
CP00000025	Item 10000	BLACK	30	PCS
CP00000026	Item 10000	BLACK	30	PCS
CP00000027	Item 10000	BLACK	30	PCS
CP00000028	Item 10000	BLACK	30	PCS
CP00000029	Item 10000	BLACK	30	PCS
CP00000030	Item 10000	BLACK	30	PCS
CP00000031	Item 10000	BLACK	30	PCS
CP00000032	Item 10000	BLACK	30	PCS
CP00000033	Item 10000	BLACK	30	PCS
CP00000034	Item 10000	BLACK	30	PCS
CP00000035	Item 10000	BLACK	30	PCS
CP00000036	Item 10000	BLACK	30	PCS
CP00000037	Item 10000	BLACK	30	PCS
CP00000038	Item 10000	BLACK	30	PCS
CP00000039	Item 10000	BLACK	30	PCS
CP00000040	Item 10000	BLACK	30	PCS
CP00000041	Item 10000	BLACK	30	PCS
CP00000042	Item 10000	BLACK	30	PCS
CP00000043	Item 10000	BLACK	30	PCS
CP00000044	Item 10000	BLACK	30	PCS
CP00000045	Item 10000	BLACK	30	PCS
CP00000046	Item 10000	BLACK	30	PCS
CP00000047	Item 10000	BLACK	30	PCS
CP00000048	Item 10000	BLACK	30	PCS
CP00000049	Item 10000	BLACK	30	PCS
CP00000050	Item 10000	BLACK	30	PCS
CP00000051	Item 10000	BLACK	30	PCS
CP00000052	Item 10000	BLACK	30	PCS
CP00000053	Item 10000	BLACK	30	PCS
CP00000054	Item 10000	BLACK	30	PCS
CP00000055	Item 10000	BLACK	30	PCS
CP00000056	Item 10000	BLACK	30	PCS
CP00000057	Item 10000	BLACK	30	PCS
CP00000058	Item 10000	BLACK	30	PCS
CP00000059	Item 10000	BLACK	30	PCS
CP00000060	Item 10000	BLACK	30	PCS
CP00000061	Item 10000	BLACK	30	PCS
CP00000062	Item 10000	BLACK	30	PCS
CP00000063	Item 10000	BLACK	30	PCS
CP00000064	Item 10000	BLACK	30	PCS
CP00000065	Item 10000	BLACK	30	PCS
CP00000066	Item 10000	BLACK	30	PCS
CP00000067	Item 10000	BLACK	30	PCS
CP00000068	Item 10000	BLACK	30	PCS
CP00000069	Item 10000	BLACK	30	PCS
CP00000070	Item 10000	BLACK	30	PCS
CP00000071	Item 10000	BLACK	30	PCS
CP00000072	Item 10000	BLACK	30	PCS
CP00000073	Item 10000	BLACK	30	PCS
CP00000074	Item 10000	BLACK	30	PCS
CP00000075	Item 10000	BLACK	30	PCS
CP00000076	Item 10000	BLACK	30	PCS
CP00000077	Item 10000	BLACK	30	PCS
CP00000078	Item 10000	BLACK	30	PCS
CP00000079	Item 10000	BLACK	30	PCS
CP00000080	Item 10000	BLACK	30	PCS
CP00000081	Item 10000	BLACK	30	PCS
CP00000082	Item 10000	BLACK	30	PCS
CP00000083	Item 10000	BLACK	30	PCS
CP00000084	Item 10000	BLACK	30	PCS
CP00000085	Item 10000	BLACK	30	PCS
CP00000086	Item 10000	BLACK	30	PCS
CP00000087	Item 10000	BLACK	30	PCS
CP00000088	Item 10000	BLACK	30	PCS
CP00000089	Item 10000	BLACK	30	PCS
CP00000090	Item 10000	BLACK	30	PCS
CP00000091	Item 10000	BLACK	30	PCS
CP00000092	Item 10000	BLACK	30	PCS
CP00000093	Item 10000	BLACK	30	PCS
CP00000094	Item 10000	BLACK	30	PCS
CP00000095	Item 10000	BLACK	30	PCS
CP00000096	Item 10000	BLACK	30	PCS
CP00000097	Item 10000	BLACK	30	PCS
CP00000098	Item 10000	BLACK	30	PCS
CP00000099	Item 10000	BLACK	30	PCS
CP00000100	Item 10000	BLACK	30	PCS

### 6.1.3. Cargo document

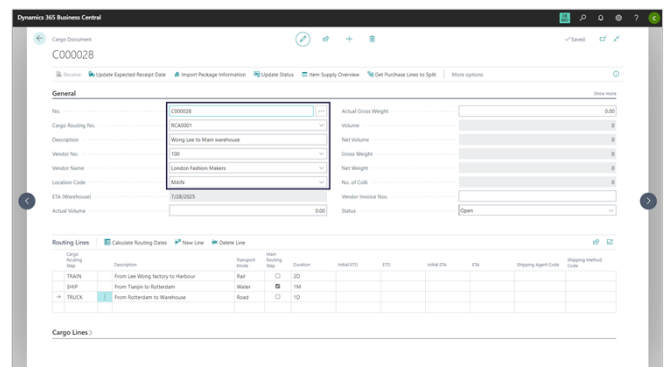
Navigate to Cargo Documents



The screenshot shows the Dynamics 365 Business Central interface with a search bar and a list of navigation options. The 'Cargo Documents' option is highlighted in the list.

#### 6.1.3.1. Cargo document Header

Cargo management begins with a cargo document, which is where items are grouped together ready for transport via the same vehicle.



The screenshot shows the Dynamics 365 Business Central interface for a Cargo Document Header (C000028). The form includes fields for Item No., Description, Location Code, and Actual Volume. The 'Routing Lines' section shows a table with columns for Item No., Description, Location Code, and Actual Volume.

Item No.	Description	Location Code	Actual Volume
TRUCK	From Tangle to Rotterdam	Water	10
TRUCK	From Rotterdam to Warehouse	Road	10

### 6.1.3.2. Cargo document Routing Lines

It is possible to define Cargo Routings in advance, specifying four possible transport mode options, a duration, and the main routing step.

After selecting a Cargo Routing No. in the cargo document header, one or more dates can be entered in the Cargo Routing Lines. Using the durations, the Calculate Routing Dates function will then calculate the remaining dates.

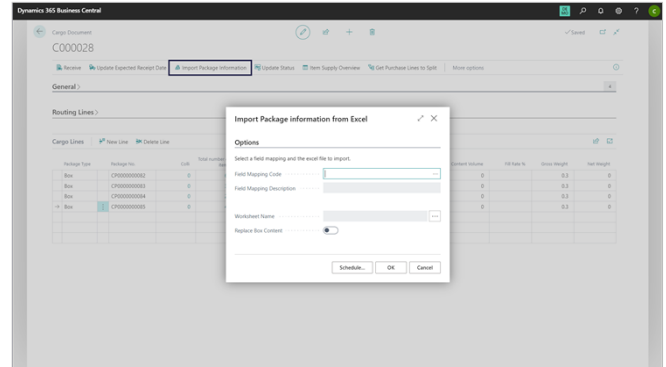
### 6.1.3.3. Cargo document Cargo Lines

It is possible to manually add previously assembled packages, pallets, or containers in the Cargo Lines, or to create them directly in the Cargo Lines and fill them manually.

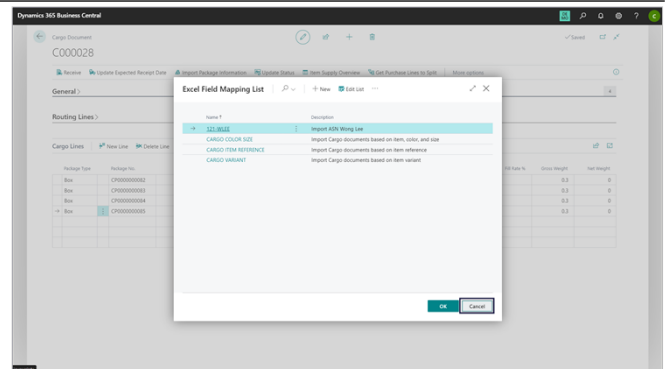
Based on the entered cargo lines, the linked items, purchase orders, and purchase order lines will be displayed in the factbox.

### 6.1.3.3.1. Import packages in cargo document

Using the Import Package Information function, package information can be imported from an Excel sheet and added as cargo lines to the cargo document.

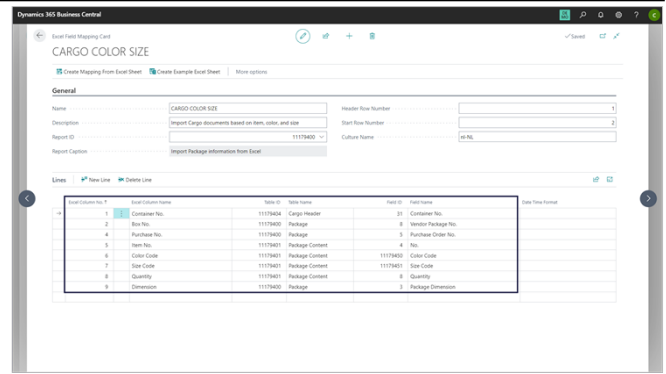


Excel Field Mappings can be created in advance as needed, which can then be used during the import process.

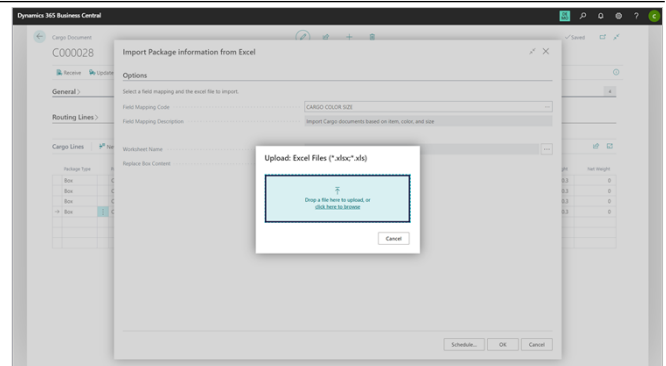


The Excel Field Mapping specifies which columns in the Excel sheet correspond to which fields in Business Central.

The Excel field mapping and the Excel file should have the same columns name. If this is not the case, an error message will appear and explain which mapping doesn't match. When the error is corrected, the package information will be filled. The field vendor package number in combination with purchase order should be unique, if this is not the case an error will appear. This should help prevent packages from being imported twice.



By dropping an Excel file or browsing to it, the data in the sheet is used to create cargo lines based on the specified field mapping.

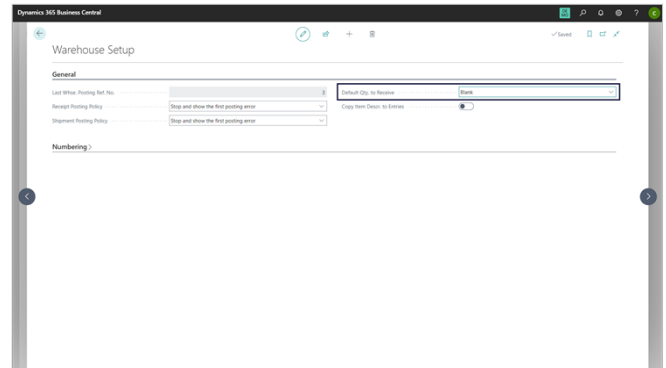


### 6.1.3.3.2.

### Receiving by scanning - warehouse receipt

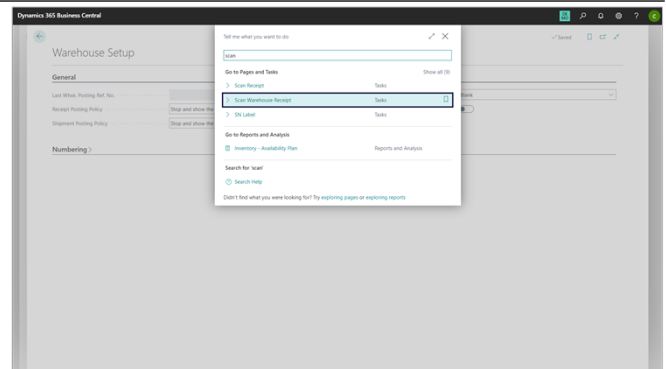
## K3 Pebblestone

In the Warehouse Setup, set the default Qty to Receive to Blank.



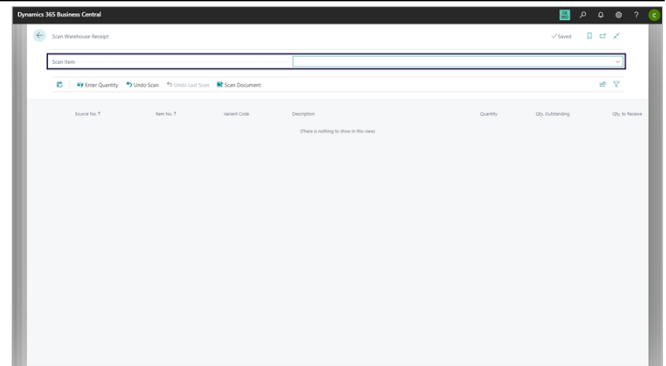
The screenshot shows the 'Warehouse Setup' window in Dynamics 365 Business Central, specifically the 'General' tab. The 'Default Qty to Receive' field is highlighted with a red box, indicating where to set the default quantity to 'Blank'.

Navigate to Scan Warehouse Receipt or use the function Scan Receipt on the Warehouse Receipt document.



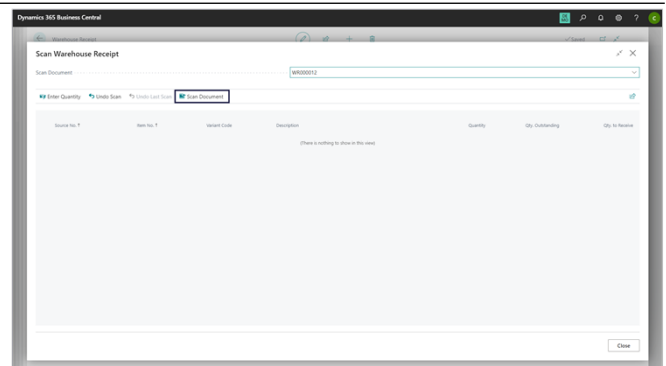
The screenshot shows the 'Warehouse Setup' window with a navigation menu open. The 'Scan Warehouse Receipt' option is highlighted, indicating the next step in the process.

The scanned bar code or manually entered value will be used as a reference to find the item to be received. The reference can be a single item or a box.



The screenshot shows the 'Scan Warehouse Receipt' window. The 'Scan Item' field is highlighted, indicating where to enter the scanned bar code or manually entered value.

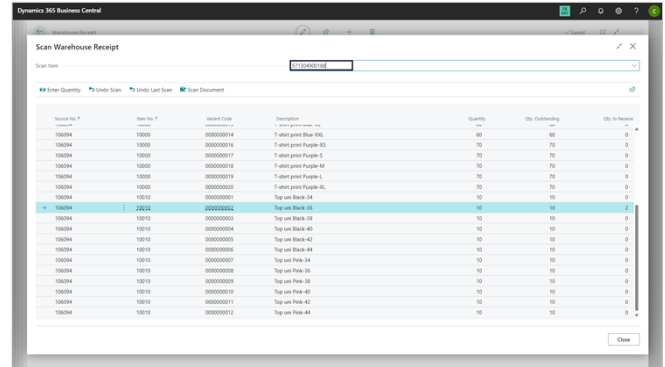
The scan status reflects the handling of the next entry. The scan status can be changed using the actions in the action bar. By first selecting the Scan Document function and scanning the document number, the lines in the document can be retrieved.



The screenshot shows the 'Scan Warehouse Receipt' window. The 'Scan Document' button is highlighted, indicating the next step in the process.

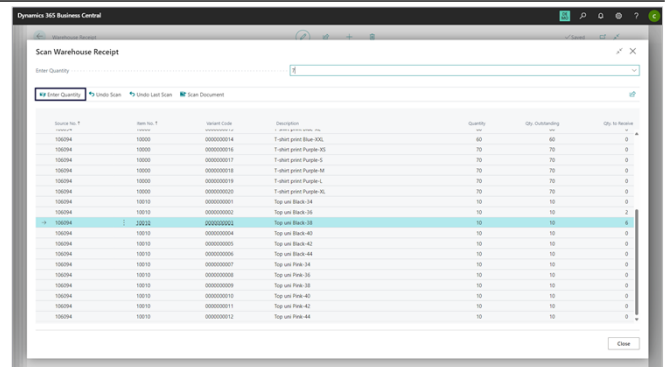
## K3 Pebblestone

By scanning the item reference, such as a bar code, it is possible to scan one specific item variant at a time.



Source No. T	Item No. T	Variant Code	Description	Quantity	Qty. Outstanding	Qty. to Receive
150004	10000	000000014	T-shirt print Blue-XL	80	80	0
150004	10000	000000016	T-shirt print Purple-XS	70	70	0
150004	10000	000000017	T-shirt print Purple-S	70	70	0
150004	10000	000000018	T-shirt print Purple-M	70	70	0
150004	10000	000000019	T-shirt print Purple-L	70	70	0
150004	10000	000000020	T-shirt print Purple-XL	70	70	0
150004	10010	000000001	Top unit Black-34	10	10	0
150004	10010	000000002	Top unit Black-36	10	10	0
150004	10010	000000003	Top unit Black-38	10	10	0
150004	10010	000000004	Top unit Black-40	10	10	0
150004	10010	000000005	Top unit Black-42	10	10	0
150004	10010	000000006	Top unit Black-44	10	10	0
150004	10010	000000007	Top unit Pink-34	10	10	0
150004	10010	000000008	Top unit Pink-36	10	10	0
150004	10010	000000009	Top unit Pink-38	10	10	0
150004	10010	000000010	Top unit Pink-40	10	10	0
150004	10010	000000011	Top unit Pink-42	10	10	0
150004	10010	000000012	Top unit Pink-44	10	10	0

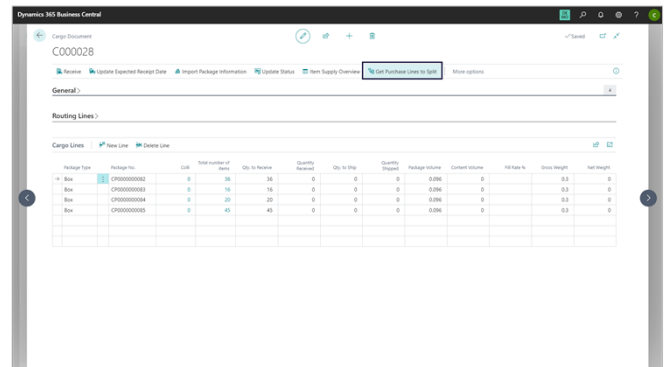
By first selecting the Enter Quantity function, entering the amount, and then scanning the item reference, multiple units of an item variant can be scanned.



Source No. T	Item No. T	Variant Code	Description	Quantity	Qty. Outstanding	Qty. to Receive
150004	10000	000000014	T-shirt print Blue-XL	80	80	0
150004	10000	000000016	T-shirt print Purple-XS	70	70	0
150004	10000	000000017	T-shirt print Purple-S	70	70	0
150004	10000	000000018	T-shirt print Purple-M	70	70	0
150004	10000	000000019	T-shirt print Purple-L	70	70	0
150004	10000	000000020	T-shirt print Purple-XL	70	70	0
150004	10010	000000001	Top unit Black-34	10	10	0
150004	10010	000000002	Top unit Black-36	10	10	0
150004	10010	000000003	Top unit Black-38	10	10	0
150004	10010	000000004	Top unit Black-40	10	10	0
150004	10010	000000005	Top unit Black-42	10	10	0
150004	10010	000000006	Top unit Black-44	10	10	0
150004	10010	000000007	Top unit Pink-34	10	10	0
150004	10010	000000008	Top unit Pink-36	10	10	0
150004	10010	000000009	Top unit Pink-38	10	10	0
150004	10010	000000010	Top unit Pink-40	10	10	0
150004	10010	000000011	Top unit Pink-42	10	10	0
150004	10010	000000012	Top unit Pink-44	10	10	0

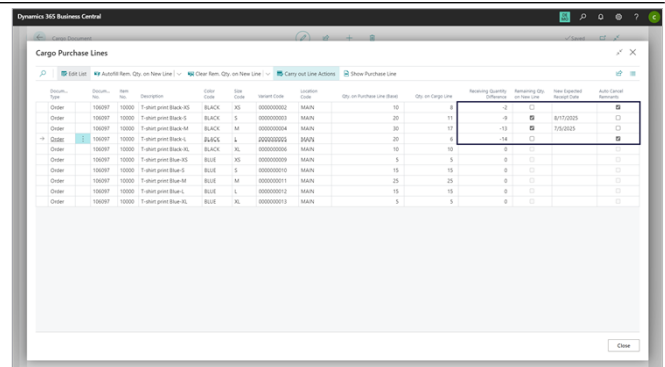
### 6.1.3.4. Get purchase lines to split

Use the Get Purchase Lines to Split function when the received quantities are lower than those ordered in the related purchase lines.



Package Type	Package No.	Unit	Total number of items	Qty. to Receive	Quantity Received	Qty. to Ship	Quantity Shipped	Package Volume	Content Volume	HS Rate %	Gross Weight	Net Weight
Box	CP000000002	0	36	36	0	0	0	0.0396	0	0	0.0	0
Box	CP000000003	0	36	36	0	0	0	0.0396	0	0	0.0	0
Box	CP000000004	0	20	20	0	0	0	0.0396	0	0	0.0	0
Box	CP000000005	0	40	40	0	0	0	0.0396	0	0	0.0	0

The differences will be calculated automatically. Decide whether a new purchase order line with a new expected receipt date should be created for the remaining quantities, or whether the outstanding quantities can be cancelled.



Order	Item No.	Description	Unit	Qty. on Purchase Line	Qty. on Order Line	Remaining Quantity	Expected Qty.	New Expected	Order Status
Order	150007	10000	T-shirt print Black-XS	10	10	0	10	8/1/2025	Open
Order	150007	10000	T-shirt print Black-S	20	20	0	20	8/1/2025	Open
Order	150007	10000	T-shirt print Black-M	30	30	0	30	8/1/2025	Open
Order	150007	10000	T-shirt print Black-L	10	10	0	10	8/1/2025	Open
Order	150007	10000	T-shirt print Black-XL	10	10	0	10	8/1/2025	Open
Order	150007	10000	T-shirt print Blue-XS	5	5	0	5	8/1/2025	Open
Order	150007	10000	T-shirt print Blue-S	10	10	0	10	8/1/2025	Open
Order	150007	10000	T-shirt print Blue-M	20	20	0	20	8/1/2025	Open
Order	150007	10000	T-shirt print Blue-L	15	15	0	15	8/1/2025	Open
Order	150007	10000	T-shirt print Blue-XL	5	5	0	5	8/1/2025	Open

**106097 - London Fashion Makers**

[New](#)
[Prepare](#)
[Print/Stand](#)
[Order](#)
[Actions](#)
[Related](#)
[Automate](#)
[Footer Options](#)

[Open Header](#)
[Print](#)
[Reopen](#)
[Create With Receipt](#)
[Create Inventory Put-away Pick](#)
[Send Intercompany Purchase Order](#)
[Archive Document](#)

**General** London Fashion Makers 6/20/2015

[Lines](#)
[Totals](#)
[Line Functions](#)
[Order](#)

[Expand](#)
[Expand All](#)
[Collapse All](#)
[Split Line](#)
[Select Items...](#)
[New Line](#)
[Delete Line](#)

Type	No.	Description	Location Code	Quantity	Unit Quantity	Price	Unit of Measure	Stock Cost Price	Line Discount	Line Amount	Season Code	Delivery Date	Inventory Drop Date
Material	10000	1 shirt gray	MAIN	157	155	-39	PCS	3.2660		376.43	202015	6/3/2025	6/3/2025
Material	10000	1 shirt gray	MAIN	22	20	95	PCS	3.2660		71.96	202015		
Subtotal (Excl. VAT GBP)				451.81	Total Item Quantity		159	Subtotal Amount (GBP)		451.81			
Invoice Discount Amount (GBP)				0.00	Total VAT (GBP)		112.75	Invoice Discount %		0			
					Total incl. VAT (GBP)		564.56						

**Invoice Details** Print View

**Production Address**

[illegible]

When the cargo document is posted, it is possible that related packages, pallets or even cargo documents are completely received. During posting, the related packages will be marked as Received. The Update Status function allows checking and changing the cargo document status. The function enables the status of multiple documents to be checked in a single action.

**Cargo Document**  
C000028

[Refresh](#)
[Update Expected Receipt Date](#)
[Import Package Information](#)
[Update Status](#)
[Item Supply Overview](#)
[Get Purchase Lines to Split](#)
[More options](#)

**General**

No.: C000028 Actual Gross Weight: 0.00  
 Cargo Routing No.: RAC0001 Volume: 0.00  
 Description: Wing Lead to Main warehouse Net Volume: 0.00  
 Master No.: 100 Gross Weight: 0.0  
 Master Name: London Station Masters Net Weight: 0.0  
 Location Code: MATH Net of Gds: 0  
 ETA (Download): 7/08/2005 Vendor Invoice No.:  
 Actual Volume: 0.00 Status: Open

[Details](#)
[Attachments \(0\)](#)

**Related**

Purchase Documents  
 Purchase Doc. Lines  
 Purchase Orders  
 Purchase Order Lines

Purchase Order No. 1  
 10000  
 Order 10000  
 10

Purchase Order No. 7  
 10000  
 Order 10000  
 10

**Routing Lines** [Calculate Routing Dates](#) [View Line](#) [Delete Line](#) [Go](#)

Cargo Item	Description	Term, Unit	Origin	Destination	Initial ETD	ETD	Initial ETA	ETA	Shipping Agent Code	Shipping Method Code
→ TSSAN, SHIP	From Wing Factory to Harbour	Full	20	6/02/2005	6/02/2005	6/02/2005	6/02/2005			
→ TSSAN, SHIP	From Tugan to Rotterdam	Water	10	6/02/2005	6/02/2005	7/02/2005	7/02/2005			
→ TSSAN, SHIP	From Rotterdam to Warehouse	Air	10	7/02/2005	7/02/2005	7/08/2005	7/08/2005			

**Cargo Lines**

**Dynamics MII Business Central**

Cargo Document  
C000028

Refresh 
  Update Expected Receipt Date 
  Import Purchase Information 
  Update Status 
  View Supply Chain 
  Set Purchase Lines to Split 
  More options

---

**General** Show menu

No.	C000028	Actual Gross Weight	0.00
Cargo Routing No.	RCA0001	Volume	0.364
Description	Wing Line to Main airstaircase	Net Volume	0
Weight Unit	KG	Gross Weight	1.2
Vendor Name	Lundin Aviation Motors	Net Weight	0
Location Code	MARF	No. of Cals	0
CRM (Workorder)	ZY08-0025	Vendor Invoice No.	A
Actual Volume	0.00	Status	Open

**Routing Lines**

New Line 
  Delete Line 
  Print 
  Copy

Type	Package No.	Cost	Total volume of items	Qty to Receive	Quantity Shipped	Qty to Ship	Quantity Shipped	Purchase Order Number	Contract volume
New	CPO000000002	0	26	26	0	0	0	0	0
New	CPO000000003	0	18	18	0	0	0	0	0
New	CPO000000004	0	20	20	0	0	0	0	0
New	CPO000000005	0	40	40	0	0	0	0	0

**Details**  Attachments (0)

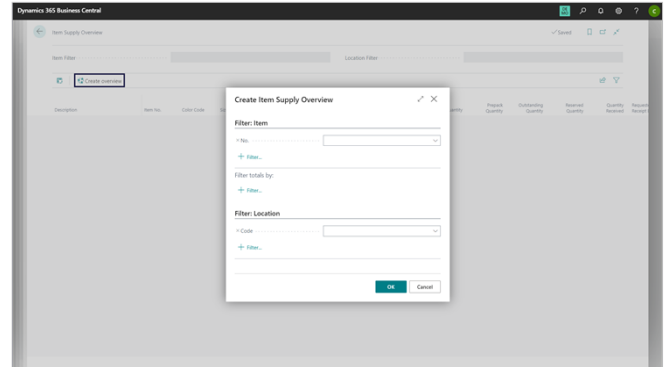
**Related**

- Purchase Documents 10000
- Purchase Doc. Lines Order 100001
- Purchase Orders 10

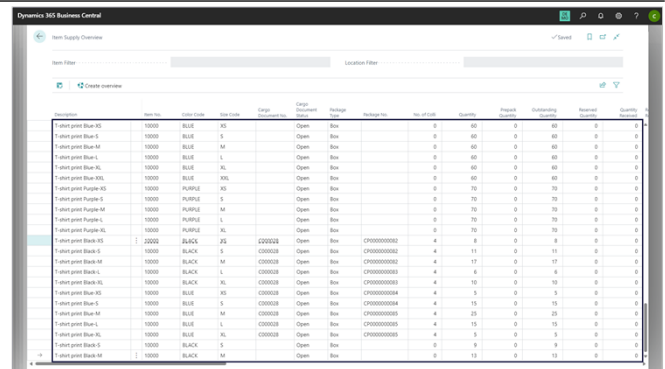
Invoice Order no. T  
**10002**

New  
Inventory 1 2

The information is loaded each time the page is opened and items have been selected. The information is not stored, ensuring that the overview is always up to date.



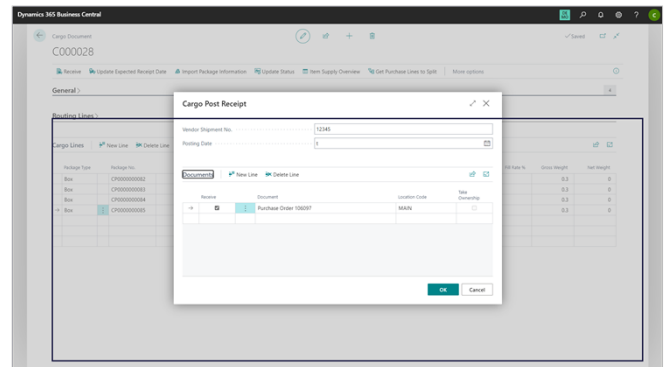
Item Supply Overview shows all incoming items within K3 Pebblestone. It provides details from purchase orders, production orders, transfer orders, cargo documents and packages in combination with delivery dates, ETD and ETA.



Item No.	Item Name	Item Code	Item Type	Order	Order Type	Package	Package No.	Qty. Ordered	Qty. Received	Qty. On Hand	Qty. Available
10000	T-shirt print Blue XS	BLU XS	XS	Open	Box			0	0	0	0
10000	T-shirt print Blue S	BLU S	S	Open	Box			0	0	0	0
10000	T-shirt print Blue M	BLU M	M	Open	Box			0	0	0	0
10000	T-shirt print Blue L	BLU L	L	Open	Box			0	0	0	0
10000	T-shirt print Blue XL	BLU XL	XL	Open	Box			0	0	0	0
10000	T-shirt print Blue XXL	BLU XXL	XXL	Open	Box			0	0	0	0
10000	T-shirt print Purple XS	PUR XS	XS	Open	Box			0	0	0	0
10000	T-shirt print Purple S	PUR S	S	Open	Box			0	0	0	0
10000	T-shirt print Purple M	PUR M	M	Open	Box			0	0	0	0
10000	T-shirt print Purple L	PUR L	L	Open	Box			0	0	0	0
10000	T-shirt print Purple XL	PUR XL	XL	Open	Box			0	0	0	0
20000	T-shirt print Black XS	BLK XS	XS	Open	Box	CP0000000002	4	0	0	0	0
10000	T-shirt print Black S	BLK S	S	Open	Box	CP0000000002	4	0	0	0	0
10000	T-shirt print Black M	BLK M	M	Open	Box	CP0000000002	4	0	0	0	0
10000	T-shirt print Black L	BLK L	L	Open	Box	CP0000000003	4	0	0	0	0
10000	T-shirt print Black XL	BLK XL	XL	Open	Box	CP0000000003	4	0	0	0	0
10000	T-shirt print Blue XS	BLU XS	XS	Open	Box	CP0000000004	4	0	0	0	0
10000	T-shirt print Blue S	BLU S	S	Open	Box	CP0000000004	4	0	0	0	0
10000	T-shirt print Blue M	BLU M	M	Open	Box	CP0000000005	4	0	0	0	0
10000	T-shirt print Blue L	BLU L	L	Open	Box	CP0000000005	4	0	0	0	0
10000	T-shirt print Blue XL	BLU XL	XL	Open	Box	CP0000000005	4	0	0	0	0
10000	T-shirt print Black S	BLK S	S	Open	Box		0	0	0	0	0
10000	T-shirt print Black M	BLK M	M	Open	Box		0	0	0	0	0

### 6.1.3.6. Cargo document Receive

By selecting the Receive function on the Cargo Document, all entered quantities linked to the corresponding purchase documents will be posted as received in one action.



### 6.1.3.7. Take Ownership procedure

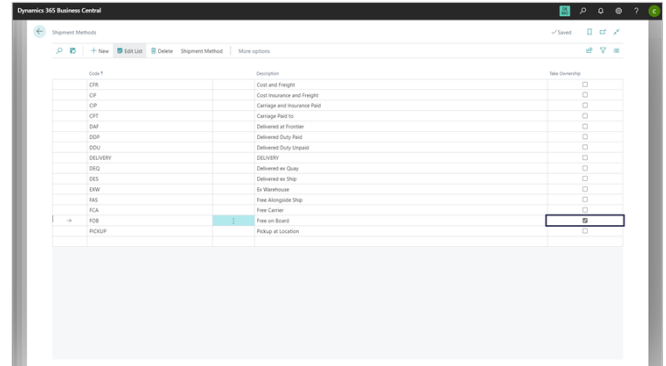
In many cases, goods are manufactured in other countries and shipped overseas before being received in the warehouse. In most of these cases, the Wholesale company becomes the owner of the goods once they are ready to be loaded onto a vessel. This means the goods should be included in inventory even though they are not yet in the warehouse. To support this, the Take Ownership functionality was created.



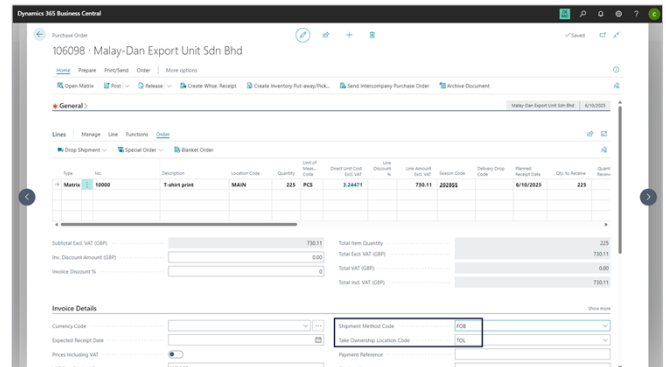
### K3 Pebblestone

For each shipment method, it can be specified whether the wholesale company becomes the owner of the goods once they are ready to be loaded onto a vessel.

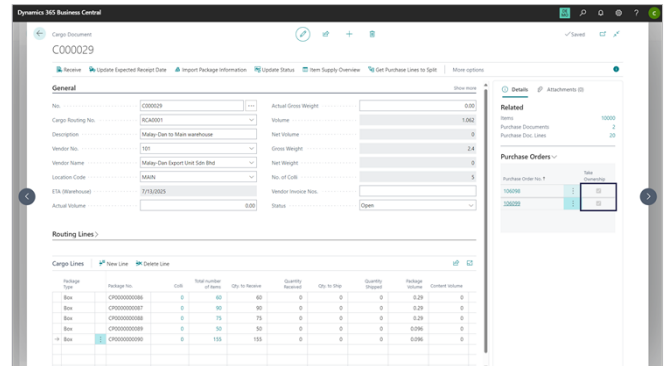
The warehouse Location Code, Shipment Method Code, and Default Ownership Location can be set on the vendor card and carried over to the purchase order.



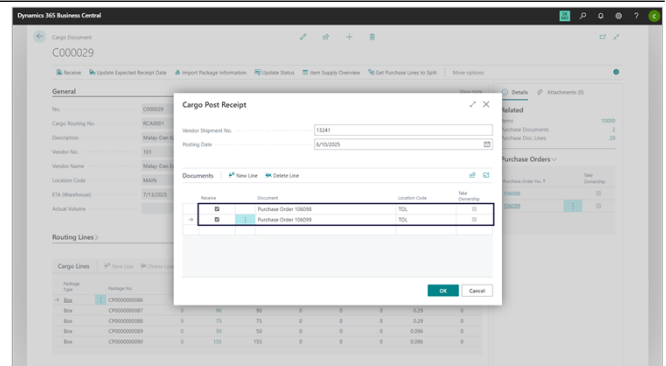
When posting the purchase receipt, the moment they are ready to be shipped, the goods are received in a different warehouse then indicated on the purchase order, in the Take Ownership Location. Subsequently a transfer order from this Take Ownership Location to the warehouse on the purchase order will be created. This transfer order will be used when the goods are actually received in the warehouse on the purchase order.



When entering the quantities to be received, a link is made to the corresponding purchase order lines. This clarifies whether the purchase order(s) involve Take Ownership.

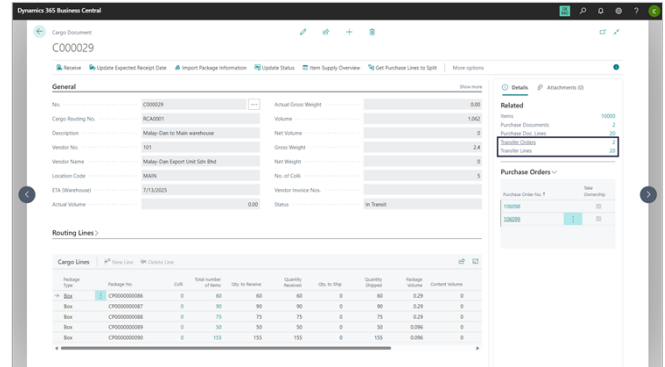


The first time when posting the cargo document receipt—at the moment the goods are ready to be shipped—they are received in the Take Ownership Location instead of the warehouse location indicated on the purchase order line. Subsequently, a transfer order will be created from this Take Ownership Location to the warehouse location specified on the purchase order.



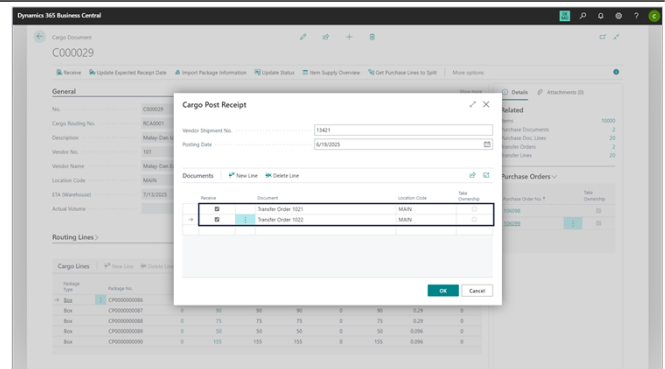
## K3 Pebblestone

The linked transfer orders and transfer order lines will be visible in the factbox based on the created transfer orders.



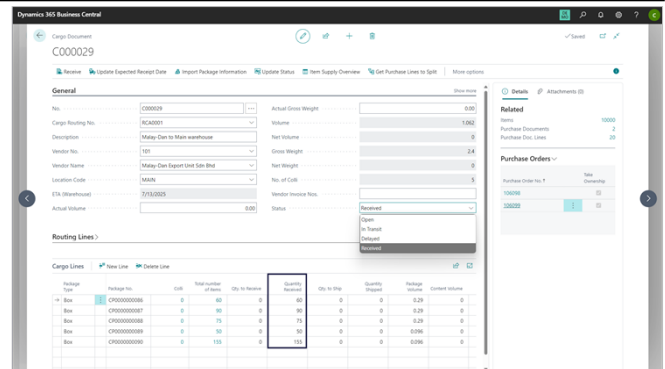
Package No.	Qty	Qty to Receive	Quantity Received	Qty to Ship	Quantity Shipped	Package Volume	Content Volume
CP000000006	0	60	60	0	60	0.29	0
CP000000007	0	90	90	0	90	0.23	0
CP000000008	0	75	75	0	75	0.23	0
CP000000009	0	50	50	0	50	0.096	0

The second time the cargo document receipt is posted, the transfer orders will be used when the goods are actually received in the warehouse location specified on the purchase order.



Document	Location Code	New Ownership
Transfer Order 1021	MAIN	0
Transfer Order 1022	MAIN	0

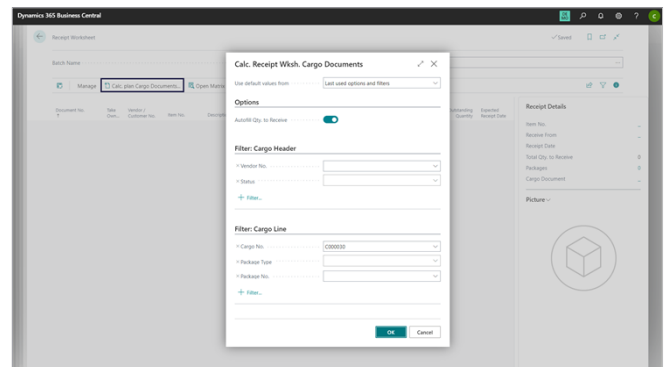
After posting the receipt, the Quantity Received in the Cargo Lines will also be updated. Once all cargo lines are received, the status of the Cargo Document will be set to Received.



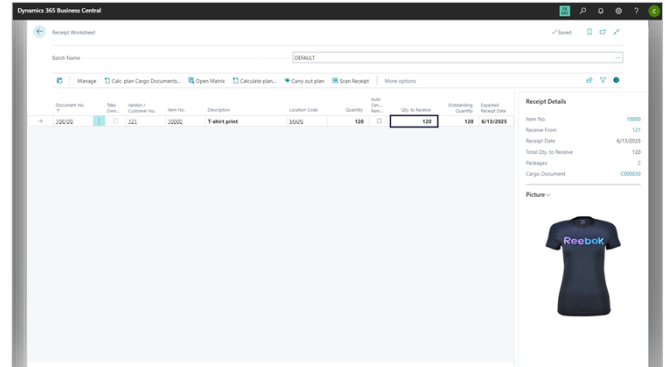
### 6.1.4. Receive cargo doc through receipt worksheet

It is possible to receive packages, pallets, or containers on cargo documents in a receipt worksheet.

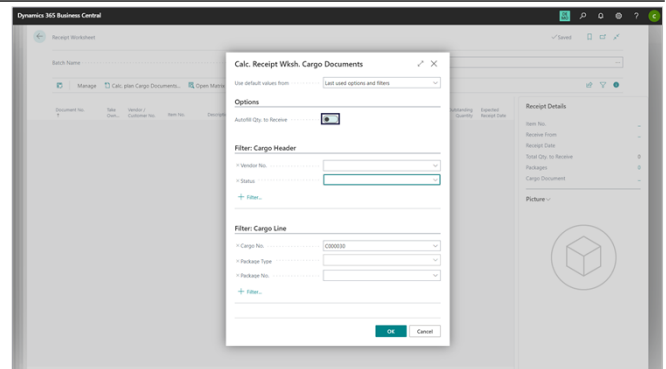
When retrieving them using the Calculate Plan Cargo Documents function, it is possible to check the Autofill Qty to Receive field.



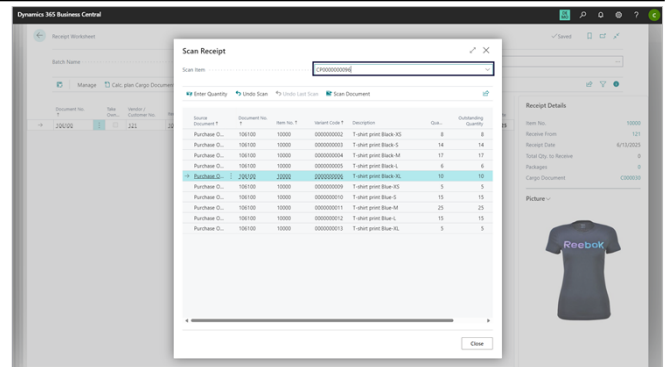
In the receipt worksheet, multiple retrieved cargo documents can be processed at once. The factbox shows the link to the cargo document.



When retrieving cargo documents using the Calculate Plan Cargo Documents function, it is possible not to check the Autofill Qty to Receive field in order to scan it afterwards.



The quantities in the Qty to Receive field are filled based on the scanned barcodes or package, pallet, or container numbers.



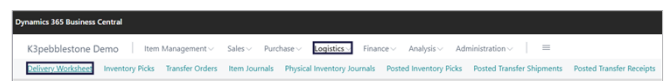
Thanks for watching



## 6.2. Delivery plan

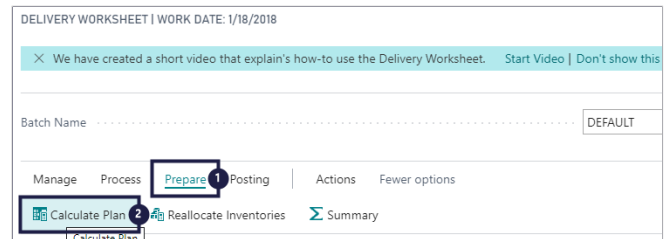
### 6.2.1. Navigate to Delivery worksheet

Click on the navigation menu item popup **Logistics**.  
Click on the navigation menu item **Delivery Worksheet**.



## 6.2.2. Calculate Plan

1. Click on the navigation menu item popup **Prepare**.
2. Click on the navigation menu item **Calculate Plan**.



DELIVERY WORKSHEET | WORK DATE: 1/18/2018

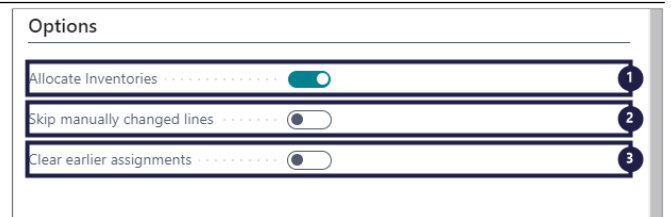
× We have created a short video that explain's how-to use the Delivery Worksheet. [Start Video](#) | [Don't show this](#)

Batch Name ..... DEFAULT

Manage Process **Prepare** Posting Actions Fewer options

**Calculate Plan** Reallocate Inventories Summary

1. Click on **Allocate Inventories**. Immediately allocate available inventories to the added delivery worksheet lines.
2. Click on **Skip manually changed lines**. Skip lines that have been modified manually.
3. Click on **Clear earlier assignments**. Set all Qty's to ship to zero, before allocating the available inventories to delivery worksheet lines.



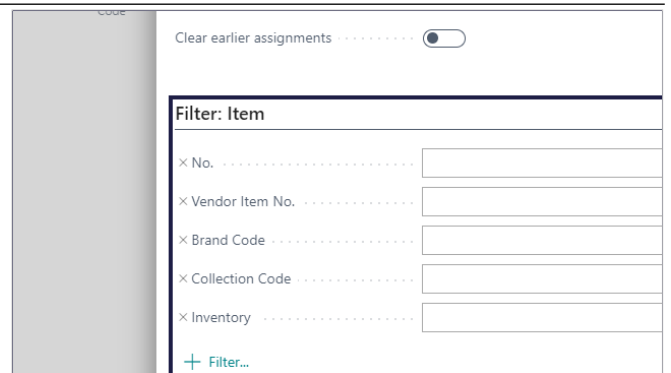
Options

Allocate Inventories ..... ☒ 1

Skip manually changed lines ..... ☐ 2

Clear earlier assignments ..... ☐ 3

Choose the filter for Item, if needed.



Clear earlier assignments ..... ☐

**Filter: Item**

× No. ....

× Vendor Item No. ....

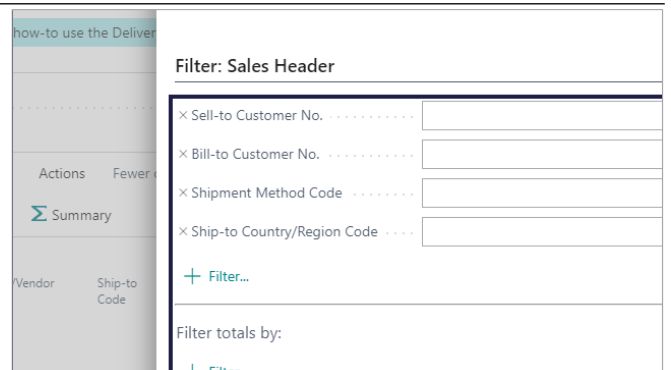
× Brand Code ....

× Collection Code ....

× Inventory ....

+ Filter...

Choose the filter for Sales Header, if needed.



**Filter: Sales Header**

× Sell-to Customer No. ....

× Bill-to Customer No. ....

× Shipment Method Code ....

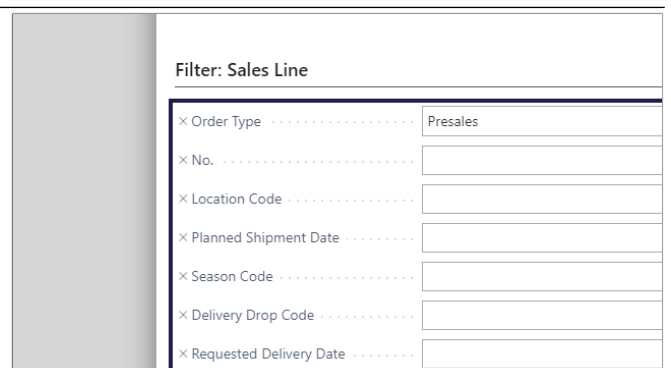
× Ship-to Country/Region Code ....

+ Filter...

Filter totals by:

+ Filter

Choose the filter for Sales line, if needed.



**Filter: Sales Line**

× Order Type ..... Presales

× No. ....

× Location Code ....

× Planned Shipment Date ....

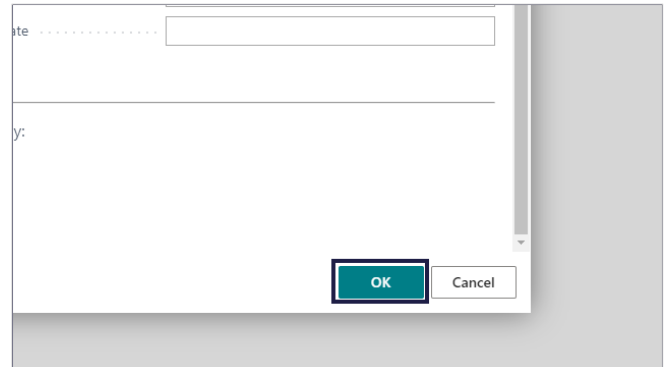
× Season Code ....

× Delivery Drop Code ....

× Requested Delivery Date ....

+ Filter

Click on the button **OK**



A screenshot of a software dialog box. It has a title bar at the top, a main area with some text and a text input field, and a bottom area with two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangle.

### 6.2.3. Delivery worksheet lines

1. **Document No.**  
Specifies the document number of the source document.
2. **Sell-to Customer/Vendor No.**  
Specifies the Sell-to Customer/Vendor No. for the order line.
3. **Sell-to Customer/Vendor Name.**  
Specifies the name of Sell-to Customer/Vendor for the order line.
4. **Ship-to Code.**  
Specifies the Ship-to Code for the order line.
5. **Item No.**  
Specifies the Item No. of the order line.
6. **Description.**  
Specifies the order line description.
7. **Outstanding Quantity.**  
Specifies how many units on the delivery line have not yet been shipped.
8. **Qty. to Allocate.**  
Specifies how many units of the delivery line quantity that you can to assign to this line.
9. **Qty. to Ship.**  
Specifies the quantity of items that remain to be shipped.
10. **Delivery Drop.**  
Specifies the delivery drop of the line.
11. **Shipment Date.**  
Specifies the shipment date of the line.
12. **Auto Cancel Remainder.**  
Specifies whether the remainder quantities on the order will be auto cancelled.

DELIVERY WORKSHEET | WORK DATE: 1/18/2018

Batch Name: ..... DEFAULT

Manage Process Prepare Posting Actions Fewer options

Delete

Document No.	Sell-to Customer/Vendor No.	Sell-to Customer/Vendor Name	Ship-to Code	Item No.	Description	Outstanding Quantity	Qty. to Allocate	Qty. to Ship	Delivery Drop	Shipment Date	Auto Cancel Remainder
1013	1005	Wilder Young Fashion		10195	Trackout jacket multi...	37	0	37	2	1/15/2018	✓
1013	1005	Wilder Young Fashion		10200	Top longleeve print	29	29	0	2	1/15/2018	✓
1013	1005	Wilder Young Fashion		10202	Jacket uni	24	24	0	1	12/15/2018	✓

1. Move the mouse to the column header **Order Type**. Specifies the Order Type of the Order.
2. Move the mouse to the column header **Season Code**. Specifies the Season Code value for Item.
3. Move the mouse to the column header **Delivery Priority**. Specifies the delivery priority for the line.
4. Move the mouse to the column header **Planned Shipment Date**. Specifies the planned shipment date of the line.
5. Move the mouse to the column header **Shipping Agent Code**. Specifies the shipping agent code for the line.
6. Move the mouse to the column header **Posting Status**. Specifies the posting status of the line.

Order Type	Season Code	Delivery Priority	Planned Shipment Date	Shipping Agent Code	Posting Status
PRESALES	2019SS		12/15/2018	TNT	Open
PRESALES	2019SS		1/15/2019	TNT	Open
PRESALES	2019SS		12/15/2018	TNT	Open
PRESALES	2019SS		12/15/2018	TNT	Open

## 6.2.4. Reallocate Inventories

Click on the navigation menu item **Reallocate Inventories**.

DELIVERY WORKSHEET | WERKDATUM: 18-1-2018

Batch Name .....

Beheren Process Prepare Posting Acties Minder opties

Calculate Plan **Reallocate Inventories** Summary

1. **Skip manually changed lines.** Skip lines that have been modified manually.
2. **Clear earlier assignments.** Set all Qty's to ship to zero, before allocating the available inventories to delivery worksheet lines.

Options

Skip manually changed lines ..... ☐ 1

Clear earlier assignments ..... ☒ 2

1. Choose the filters if needed.
2. Click on the button **OK**.

Filter: Delivery Line

× Worksheet Template Name ..... DEFAULT ✓

× Journal Batch Name ..... DEFAULT ✓

× Posting Status ..... Open ✓ 1

+ Filter...

OK 2 Cancel



## 6.2.5. Summary

Click on the navigation menu item popup **Prepare**.  
Click on the navigation menu item **Summary**.

1. **Document No.**  
Specifies the document number of the source document.
2. **Bill-to Customer/Vendor No.**  
Specifies the Bill-to Customer or Bill-to vendor of the Document No.
3. **Outstanding Qty. (Base).**  
Specifies the Outstanding Qty. (Base) for the selected Dimension Field
4. **Qty. to Ship (Base).**  
Specifies the Qty. to Ship (Base) for the selected Dimension Field.
5. **To Ship (LCY).**  
Specifies the amount to ship in LCY for the selected Dimension Field.
6. **Actual Fill %.**  
Specifies the % of quantity that will be shipped for the selected Dimension Field.
7. **Posting Status.**  
Posting status gives the indication that the goods can be shipped with or without approval.  
The Sales orders which needs approval, will have posting status pending approval, they will stay in the Delivery Worksheet and in the delivery worksheet summary.

Document No.	Bill-to Customer/Vendor No.	Outstanding Qty (Base)	Qty to Ship (Base)	To Ship (LCY)	Actual Fill %	Posting Status
1005	1019	78	7	153.02	8%	Pending Approval
1007	1031	114	0	0.00	0%	Open
1008	1037	100	0	0.00	0%	Open
1009	1009	100	0	0.00	0%	Open
1010	1022	124	0	0.00	0%	Open
1011	1024	40	0	0.00	0%	Open
1012	1026	124	0	0.00	0%	Open
1013	1003	135	35	356.41	26%	Open

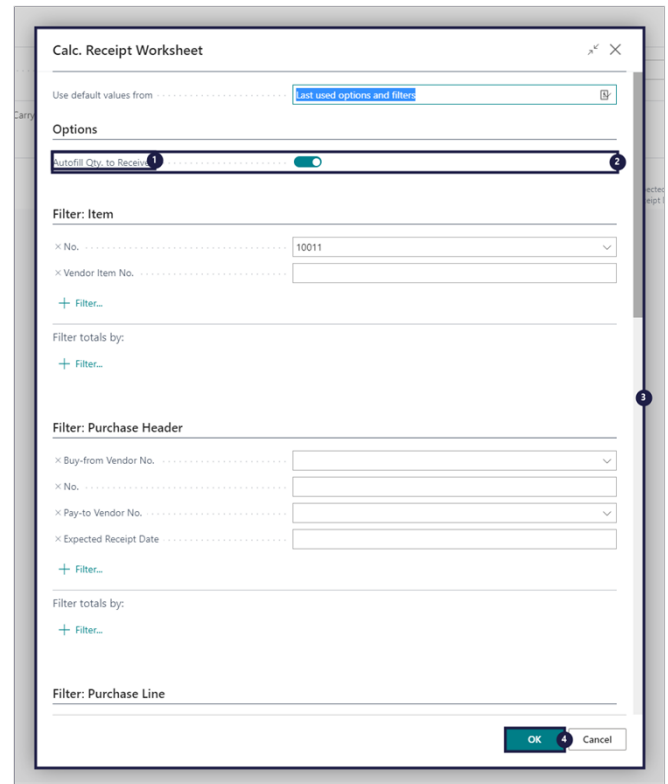
## 6.3. Receipt worksheet

### 6.3.1. Navigate to receipt worksheet

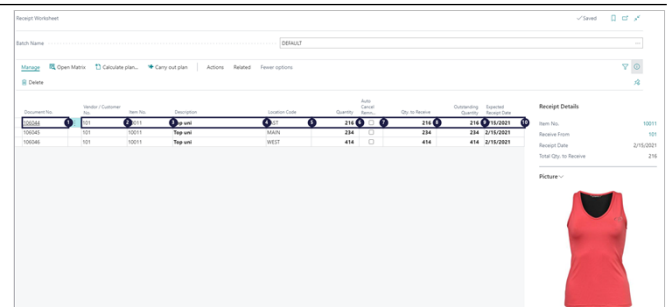
1. Click on the link **Tell me what you want to do. Quickly access actions, pages, reports, documentation, and apps and consulting services.**  
- Enter the text **receipt worksheet**.
2. Click on **Receipt Worksheet Tasks**.



1. **Autofill Qty. to Receive.**
2. **Indicates whether Qty. to Receive will be filled automatically with Outstanding Quantity, when the receipt worksheet lines are generated.**
3. **Place the filters you need.**
4. **Click on the button OK.**

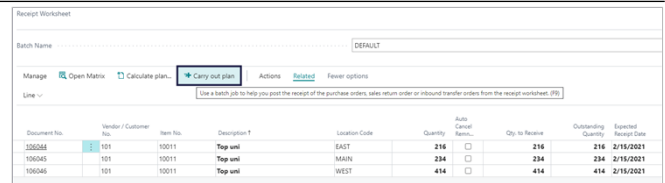


1. **Document No.**  
Specifies the number of the purchase order, the sales return order, or the inbound transfer on the worksheet.
2. **Vendor / Customer No.**  
Specifies the number for the vendor on the purchase order, or the number for the customer on a sales return order. A blank value is shown for an inbound transfer.
3. **Item No.**  
Specifies the number of the item on the receipt line.
4. **Description.**  
Specifies a description of the entry of the product to be received.
5. **Location Code.**  
Specifies the code for the inventory location where the item on the receipt line will be registered.
6. **Quantity.**  
Specifies the number of units of the item included on the purchase order line, the sales return order line, or the inbound transfer line.
7. **Auto Cancel Remnants.**  
Specifies whether the remnants on the order will be auto cancelled.
8. **Qty. to Receive.**  
Specifies the quantity of items that remains to be received.
9. **Outstanding Quantity.**  
Specifies the quantity of items that



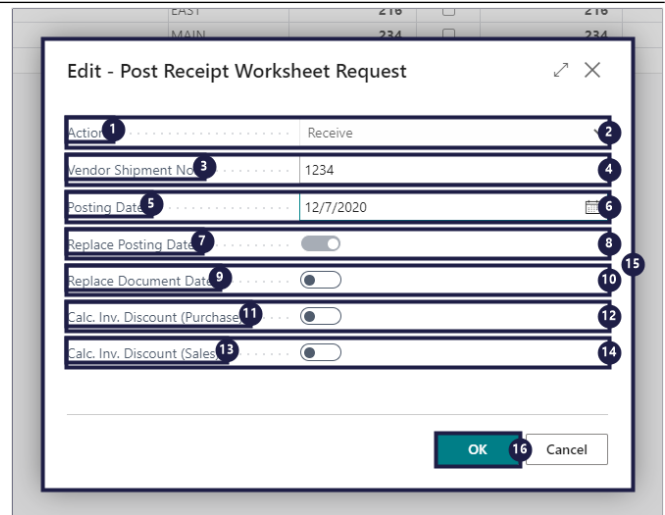
- can be received in the source document line on the receipt line.
10. **Expected Receipt Date.**  
Specifies the date you expect the items to be available in your warehouse.

1. **Carry out plan, Use a batch job to help you post the receipt of the purchase orders, sales return order or inbound transfer orders from the receipt worksheet. (F9).**



Document No.	Vendor / Customer No.	Item No.	Description	Location Code	Quantity	Auto Cancel	Qty. to Receive	Outstanding Quantity	Expected Receipt Date
100048	101	10011	Top unit	EAST	216	<input type="checkbox"/>	216	216	2/15/2021
100048	101	10011	Top unit	MAIN	334	<input type="checkbox"/>	334	334	2/15/2021
100048	101	10011	Top unit	WEST	414	<input type="checkbox"/>	414	414	2/15/2021

1. **Action.**
2. **Specifies how the source document lines will be processed. When you select Update, the Quantity to Receive field in the source document line will be updated.**
3. **Vendor Shipment No.**
4. **Specifies the vendor's shipment number.**
5. **Posting Date.**
6. **Specifies the posting date of the record.**
7. **Replace Posting Date.**
8. **Indicates whether the posting date on the source document will be replaced by the specified posting date.**
9. **Replace Document Date.**
10. **Indicates whether the document date on the source document will be replaced by the posting date.**
11. **Calc. Inv. Discount (Purchase).**
12. **Specifies if the invoice discount amount is automatically calculated with purchase documents. If this check box is selected, then the invoice discount amount is calculated automatically when you post the purchase order.**
13. **Calc. Inv. Discount (Sales).**
14. **Specifies if the invoice discount amount is automatically calculated with sales documents. If this check box is selected, then the invoice discount amount is calculated automatically when you post the sales return order.**
15. **Edit - Post Receipt Worksheet Request.**
16. Click on the button **OK**.



1

2

3

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11

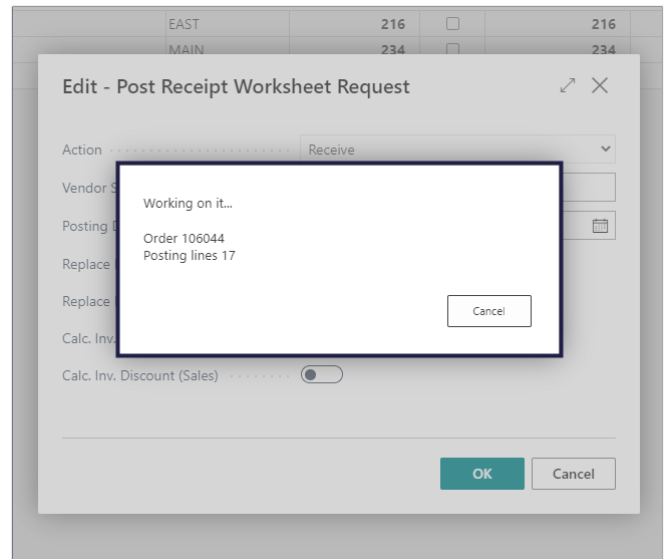
12

13

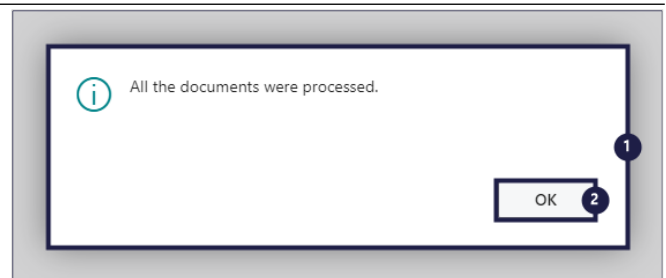
14

16

1. **Working on it...**



1. **All the documents were processed.**
2. Click on the button **OK**.



## 6.4. Create Warehouse receipt

### 6.4.1. Create warehouse receipt

1. Click on the navigation menu item popup **Actions**.
2. Click on the navigation menu item popup **Warehouse**.
3. Click on the navigation menu item **Create Warehouse Receipts**.

Receipt Worksheet | Work Date: 20/04/2021

Document No.	Description	Location Code	Quantity	Unit	Qty. to Receive	Quantity	Receipt Date
106131	T-shirt print	AMSTERDAM	40		20	40	11/05/2021
106131	Warehouse Receipt Lines	AMSTERDAM	40		0	40	20/10/2021

1. **Delete Receipt Worksheet.**  
Specifies if all existing receipt worksheet lines will be removed after the Warehouse Receipts are created.
2. Set filters if needed.
3. Click on the button **OK**.

Receipt Worksheet - Create Receipt

Options

Delete Receipt Worksheet. ....

1

Filter: Receipt Line

× Vendor / Customer No. ....

×

× Document No. ....

×

× Item No. ....

×

+ Filter...

Advanced >

OK 3

Cancel

1 Warehouse Receipt Header has been created.

1 Warehouse Receipt Header has been created.

OK