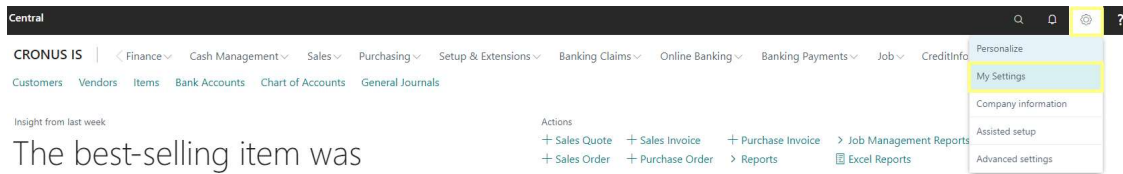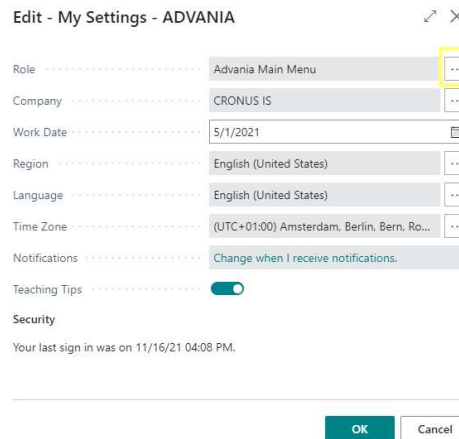**Advania Sales Addons**

Setup and instructions

Advania Sales Addons

1. SETUP

To be able to start using **Advania Sales Addons** features, the solution as well as its features must be enabled in *Sales Addons Setup*, which can be accessed in several ways. Via *Advania Main Menu* role center under *Setup & Extensions -> Advania*,

My Settings

My Settings - Role   Available Roles – Advania Main Menu

Advania Main Menu – Sales Addons Setup

via Manual Setup page under *Setup & Extensions,*

Manual Setup

Manual Setup – Advania Sales Addons

or Tell Me search.

Tell Me search – Sales Addons Setup

Sales Addons Setup page opens. Features can be set up only while the solution is disabled.

Sales Addons Setup

2. INSTRUCTIONS

Sales Addons Setup – Use Credit Limit

After enabling **Credit Limit feature** in *Sales Addons Setup*, the posting of a Sales Order/Invoice will be blocked by an error if Customer's Balance (LCY) summed with Amount Including VAT from the Sales document exceeds Customer's Credit Limit (LCY). Customer will be blocked as well if its Balance (LCY) exceeds its Credit Limit (LCY).

Customer – before posting

Sales Order

1002 · Advania Ísland ehf.

Process   Release   Posting   Prepare   Order   Request Approval   Print/Send   Navigate | Actions   Related   Fewer options

Post...   Post and New...   Post and Send...   Preview Posting

No.	1002	Due Date	6/1/2021
Customer Name	Advania Ísland ehf.	Requested Delivery Date	
Contact	Alvaro Carrera	External Document No.	
Posting Date	5/1/2021	Status	Open
Order Date	5/1/2021	Job No.	

Lines | Manage   Line   Order   Fewer options

Type		No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quant
→ Item	⋮	1896-S	ATHENS-skrifborð		1		

Subtotal Excl. VAT (ISK)	65,260	Total Excl. VAT (ISK)	65,260
Inv. Discount Amount Excl...	0	Total VAT (ISK)	15,662
Invoice Discount %	0	Total Incl. VAT (ISK)	80,922

Sales Order – post

Error Messages

Search   Open Related Record | More options

Message Type ↑		Description	Context	Context Field Name	Source
Error	⋮	*Can't post! Credit limit reached!*	Sales Header: Order,1002		_

Credit Limit reached error

Customer – after posting

Salesperson Code Verification

Salesperson Code Verification feature stops the posting of a sales document if the Salesperson Code is missing.

Sales Addons Setup – Salesperson Code Verification

If Salesperson Code Verification is enabled, an error message will stop the posting of the sales document which is missing a Salesperson Code.

Posting a sales document with missing Salesperson Code

Missing Salesperson Code error message

Sales Lines History
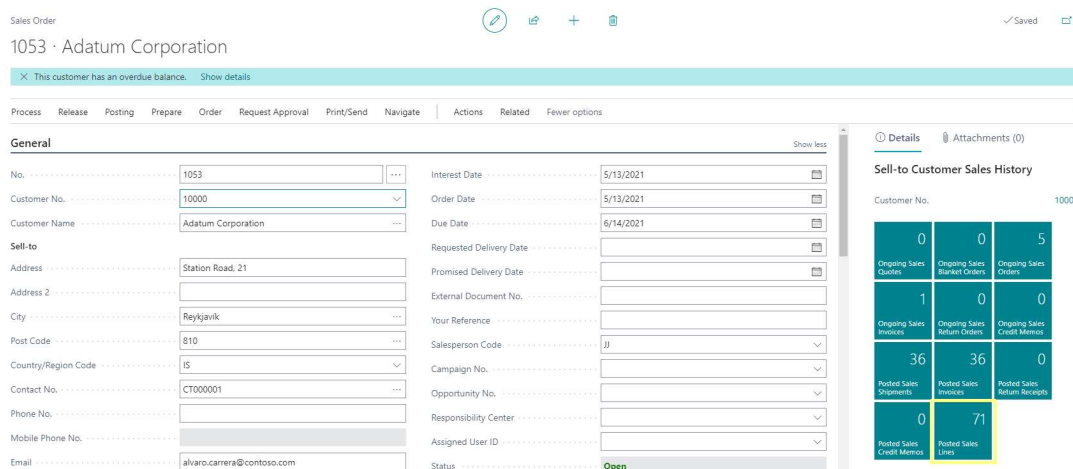
Sales Lines History feature enables the users to see an additional *Posted Sales Lines* box in the Sell-To Customer Sales History factbox when creating a new Sales Order.

Sales Addons Setup – Sales Lines History

When we add a Customer to a new Sales Order, we get information about posted sales lines for that customer in the box *Posted Sales Lines* in the Sell-To Customer Sales History factbox.

Sales Addons Setup – Sales Lines History

We can drill-down to see a list of the posted sales lines.

Posted Sales Lines

Search + New 📝 Edit List 🗑 Delete

| Document No. ↑	Posting Date	Type	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Deferral Code	Department Code	Customergroup Code
103002	1/15/2020	Item	1960-S	ROME-stóll, grænn	4	STYKKI	12.570,00		50.280			MEÐAL
103007	1/19/2020	Item	1896-S	ATHENS-skrifborð	5	STYKKI	65.260,00		326.300			MEÐAL
103007	1/19/2020	Item	1972-S	MUNICH-skrifst.stóll, gulur	2	STYKKI	12.390,00		24.780			MEÐAL
103007	1/19/2020	Item	1996-S	ATLANTA-tússtafla, grunn	4	STYKKI	91.120,00		364.480			MEÐAL
103016	2/13/2020	Item	1960-S	ROME-stóll, grænn	4	STYKKI	12.570,00		50.280			MEÐAL
103020	2/17/2020	Item	1896-S	ATHENS-skrifborð	7	STYKKI	65.260,00		456.820			MEÐAL
103020	2/17/2020	Item	1972-S	MUNICH-skrifst.stóll, gulur	2	STYKKI	12.390,00		24.780			MEÐAL
103020	2/17/2020	Item	1996-S	ATLANTA-tússtafla, grunn	4	STYKKI	91.120,00		364.480			MEÐAL
103028	3/14/2020	Item	1960-S	ROME-stóll, grænn	5	STYKKI	12.570,00		62.850			MEÐAL

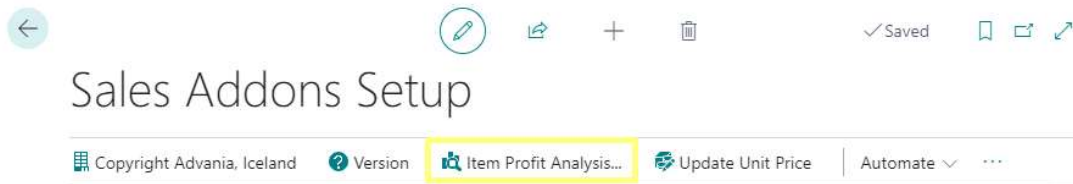*Sales Addons Setup – Sales Lines History*

Item Profit Analysis

Item Profit Analysis feature enables the users to use a page to see additional item information
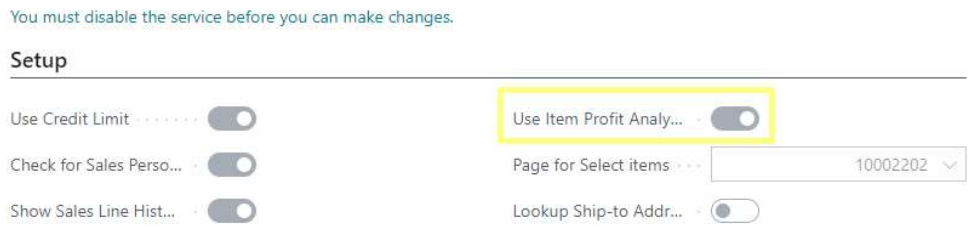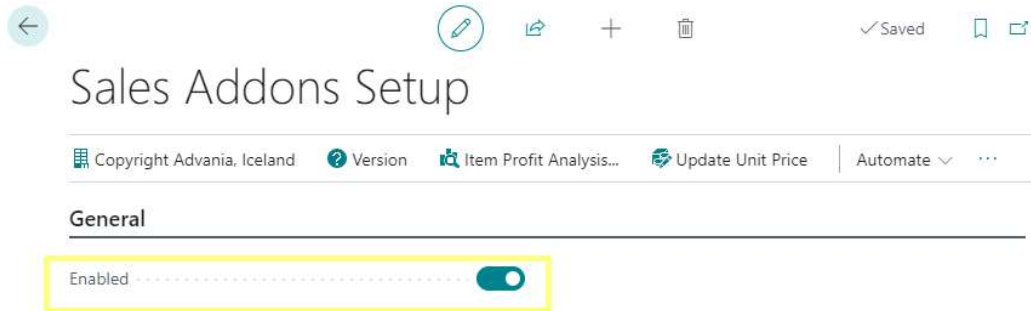
Sales Addons Setup – Use Item Profit Analysis

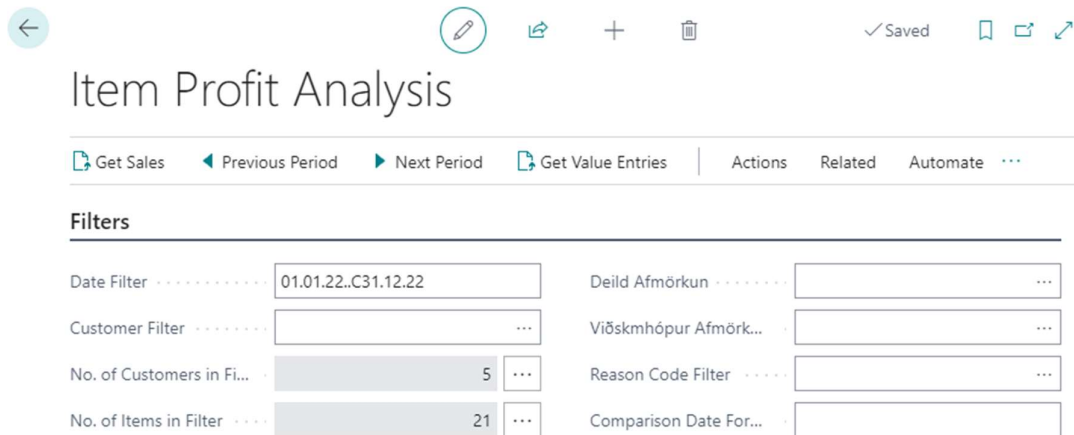You can navigate to the Item Profit Analysis page directly from the Sales Addons Setup page or from the search

Sales Addons Setup – Item Profit Analysis

Tell me search – Item Profit Analysis

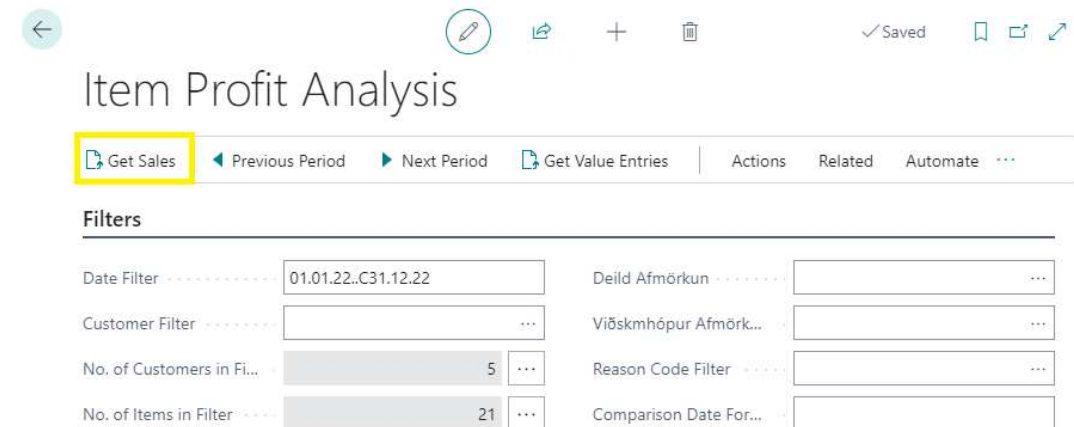The Item Profit Analysis page will open

Item Profit Analysis

We start by inserting the relevant filters, e.g. date and if a specific customer is to be selected.

You can set specific customer in the „Customer Filter" field. You can also go to „No. of Customers in Filter" and enter more than one. By default all customers are selected. The same applies to the field „No. Of Items in Filter". There you can go in and select the Item no. To view. By default all items are selected.

It is also possible to filter sales on certain dimensions.

Once the necessary filters have been set, click on the „Get Sales" action

Item Profit Analysis – Get Sales

The system returns information on item categories and production categories which can then be drilled down to specific products
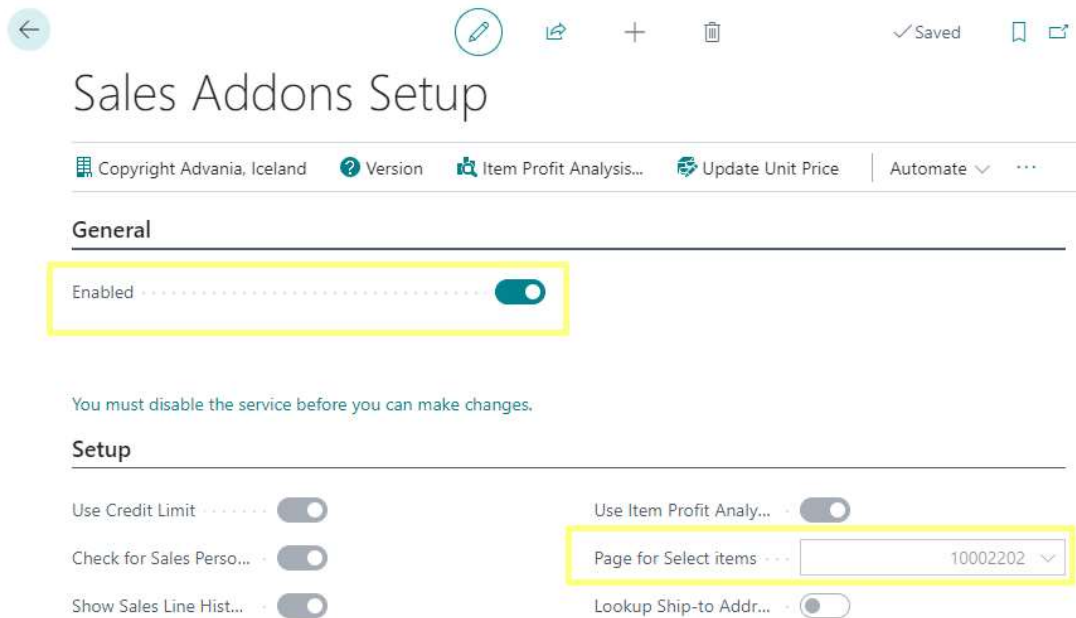
Item Profit Analysis – Information on Categories

Item Profit Analysis – Drill down to specific products

Page for Select Items

Page for Select Items feature enables the users to choose which page they want to use when selecting items in sales order lines. By default, this is set to Advania's custom Item List page 10002202.
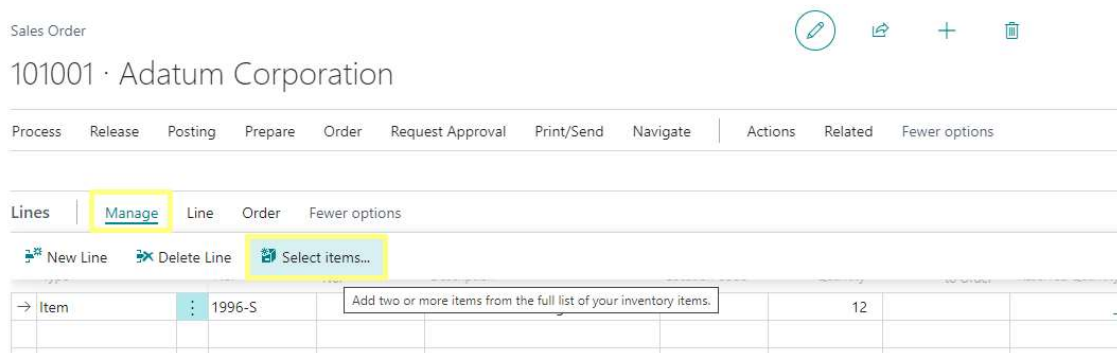
Sales Addons Setup – Item Line Selection

If page 10002202 is selected in Sales Addons Setup, it will open when running Select Items... action in Sales Order Lines. Otherwise, the standard Item List page 31 will open.

Sales Order Lines – Select items

In Advania's custom Item List page, the users will be able to see Reference No. if there is any for the given item, as well as insert Quantity which will then be added to the new Sales Order Line.

Items

	No. ↑	Description	Reference No.	Qty.	Type	Inventory	Substi... Exist
	1896-S	ATHENS-skrifborð	78382_43764	7	Inventory	-34	No
→	1900-S	PARIS-stóll, svartur		3	Inventory	-11	No
	1906-S	ATHENS-laus fótstallur		0	Inventory	-11	No
	1908-S	LONDON-skrst.stóll, blár		0	Inventory	-25	No
	1920-S	ANTWERP-fundarborð		0	Inventory	-19	No
	1925-W	Símafundarbúnt 1–6		0	Inventory	-3	No
	1928-S	AMSTERDAM-lampi		0	Inventory	-5	No
	1929-W	Símafundarbúnt 1–8		0	Inventory	0	No
	1936-S	BERLIN-stóll, gulur		0	Inventory	77	No
	1953-W	Gestahluti 1		0	Inventory	-49	No
	1960-S	ROME-stóll, grænn		0	Inventory	2	No
	1964-S	TOKYO-stóll, blár		0	Inventory	4	No
	1965-W	Símafundarbúnt 2–8		0	Inventory	-81	No
	1968-S	MEXICO-skrifstóll, svartur		0	Inventory	-5	Yes
	1969-W	Símafundarpakki 1		0	Inventory	-7	No
	1972-S	MUNICH-skrifst.stóll, gulur		0	Inventory	0	No
	1980-S	MOSCOW-skststóll, rauður		0	Inventory	0	Yes
	1988-S	SEOUL-stóll, rauður		0	Inventory	0	Yes
	1996-S	ATLANTA-tússtafla, grunn		0	Inventory	3	No
	2000-S	SYDNEY Skrst.stóll, grænn		0	Inventory	34	No

OK Cancel

Advania Items

All item lines with added quantity will be taken into account when new lines are added to the Sales Order.

Sales Order

101001 · Adatum Corporation

Process Release Posting Prepare Order Request Approval Print/Send Navigate | Actions Related Fewer options

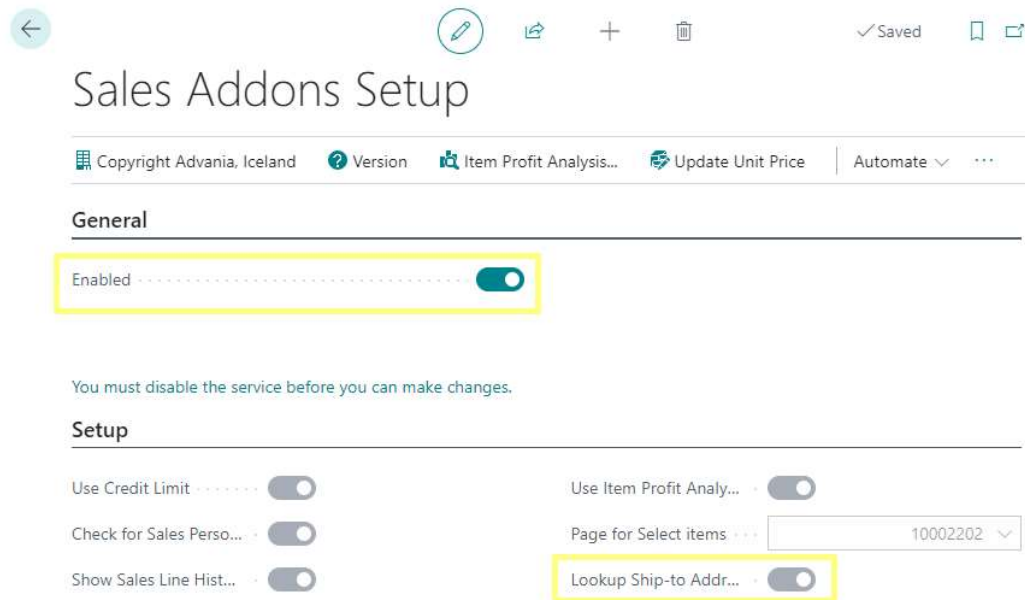General >   4/2/2021 4/2/2021 5/2/2021 Open

Lines | Manage Line Order Fewer options

	Type		No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT
→	Item		1996-S		ATLANTA-tússtafla, grunn		12		_	STYKKI	91,120.00
	Item		1896-S		ATHENS-skrifborð		7		_	STYKKI	65,260.00
	Item		1900-S		PARIS-stóll, svartur		3		_	STYKKI	12,570.00

Sales Order Lines

Lookup Ship-to Address

Lookup Ship-to Address feature enables the users to look up in Ship-to Address List from Sales documents if the Customer is using them. After enabling the feature in *Sales Addons Setup*, lookup will be enabled for Sales Quotes, Sales Orders, Sales Invoices and Sales Credit Memos on validating Customer No. or Customer Name on the document.

Sales Addons Setup – Lookup Ship-to Address

If, after enabling the feature, we choose a Customer that does not use Ship-to Addresses, *Ship-to* will be automatically set to **Default (Sell-to Address)**. Otherwise, *Ship-to Address List* page will open, where we can choose *Ship-to Address.*

Ship-to Address List

Ship-to will automatically be set to **Alternate Shipping Address**. It can be found under *Shipping and Billing* tab in Sales documents.

Ship-to in Shipping and Billing

Cash Payment

Cash Payment feature adds Cash Payment Customer information to Sales documents if the Customer is set up in *Sales Addons Setup*, with possibility to connect to National Register Service via Customer's Registration No. It also makes it possible to print this Cash Payment information from the posted Sales documents.

Sales Addons Setup – Cash Payment

Only after enabling **Cash Payment feature** will „Cash Payment Customer" and „Connect Registration No." fields become enabled. Set up the Customer for which you want Cash Payment information to be shown and optionally enable connection with National Register Service. NRS Connection can only be used if *Advania - National Register Service Subscription* is enabled in Service Connections page.

Cash Payment Customer Information will now be visible in the document where they can be manually filled out, or they can be automatically imported from National Register Service. We can run automatic import if we set Registration No. and then run Apply National Register action which is enabled only if „Connect Registration No." field in setup is enabled.

Sales Order – Cash Payment and Apply Natonal Register

Sales Order – Cash Payment Infomration after running Apply Natonal Register

After posting the document, we can print/view it in pdf format with Cash Payment Registration No. shown by running Print action from the posted document.
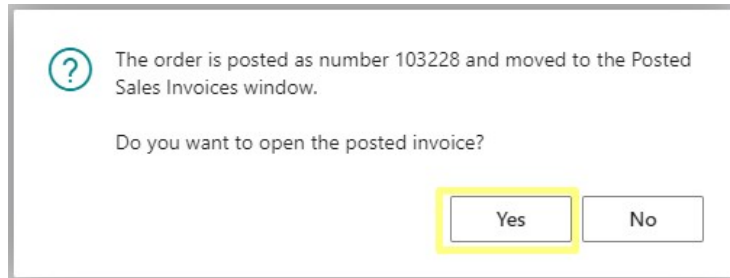
Open the posted document

If the Customer from the document is not set up in *Sales Addons Setup* or the feature is not enabled, Cash Payment Registration No. will not be displayed on the report.
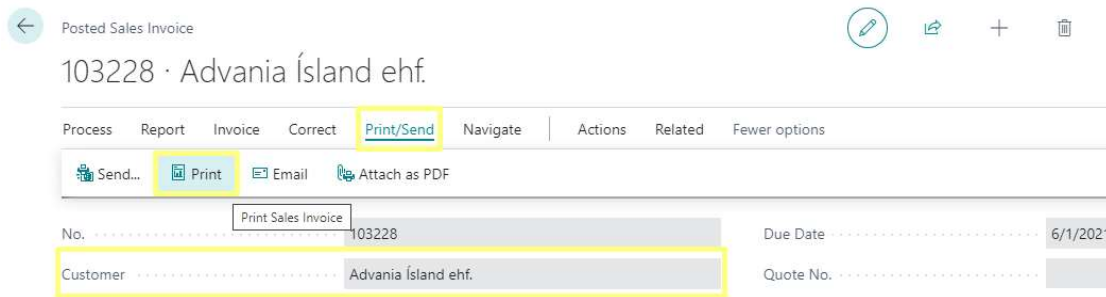
Print Posted Sales Invoice with Cash Payment Information

SA Sales - Invoice – request page

SA Sales - Invoice report with Cash Payment Information

The same process as the one shown for Sales Invoices is used for Sales Quotes and Sales Credit Memos as well.

Reports

In the **Report Selection** section of *Sales Addons Setup*, **Print Sticker report** ids and captions are automatically filled out when opening the setup page for the first time – they show which objects are used for running the reports. In addition, we can choose whether to **Print Sticker Report after Posting**.
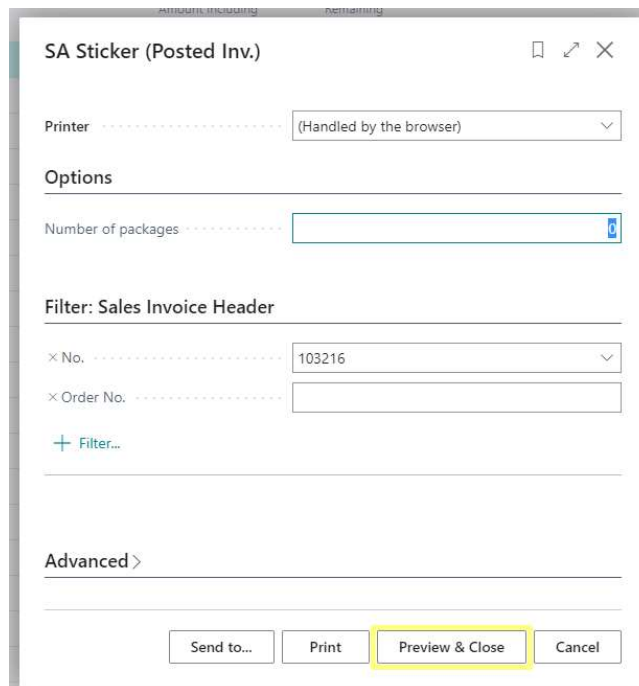
Sales Addons Setup – Report Selection

Print Sticker Report's request page is automatically run after posting a Sales Order/Invoice if „Print Sticker Report after Posting" is set to Always in *Sales Addons Setup*.
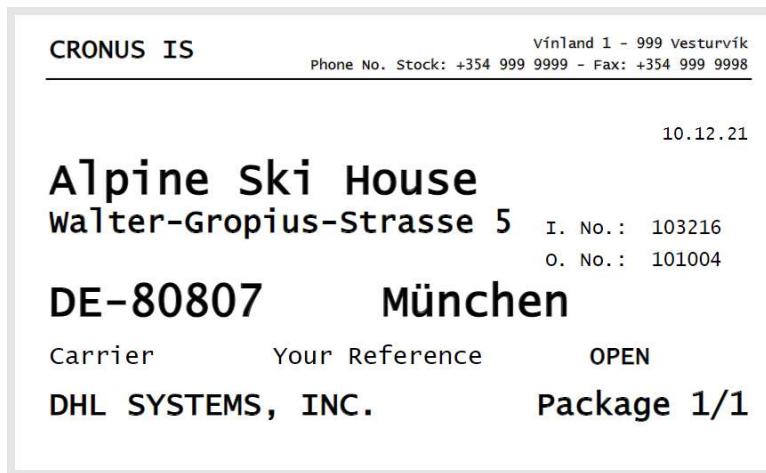

Print Sticker report – request page

If „Print Sticker Report after Posting" is set to Never in *Sales Addons Setup,* the report won't be run after posting, and if it's set to Ask then the printing of the Sticker Report must be confirmed.

Print Sticker report confirmation
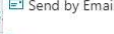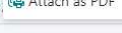

Sticker report

Print Sticker report can also be run from Posted Sales Invoice/Posted Sales Invoices if „Print Sticker Report ID" is populated in *Sales Addons Setup*, and if the solution is enabled.

Run Print Sticker report from Posted Sales Invoices
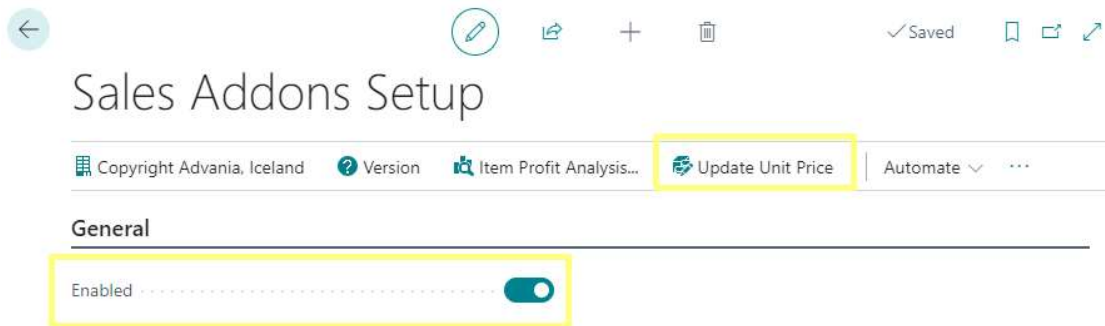
Run Print Sticker report from a Posted Sales Invoice

Update Unit Price

Update Unit Price feature enables the users to modify the sales lines unit price based on the values on Item card or Sales Price.

Sales Addons Setup – Update Unit Price

You can navigate to the Update Unit Price action directly from the Sales Addons Setup page or from the search.

Tell me search – Update Unit Price

The action will run a report request page where we can choose the source we want to use for Unit Price update (Item, Sales Price) and filter the sales lines based on Document Type.

Update Unit Price – Request Page

After setting the parameters and running the report, a confirmation message will appear:

After the update is finished, a message informing how many lines were updated will appear.

1 line(s) updated

OK

If we choose to update Unit Price in sales lines based on Item, that means that Unit Price will be updated for all filtered lines with items that have Base Unit of Measure different from Sales Unit of Measure. Unit Price will be recalculted by multiplying Item Unit Price and Qty. Per Unit of Measure.

Update Unit Price based on Item

Similar applies if we choose to update Unit Price in sales lines based on Sales Price. Unit Price will be updated for all filtered lines with items that have Base Unit of Measure different from Unit of Measure that is currently active in Sales Price. Unit Price will be recalculted by multiplying Unit Price from the Sales Price and Qty. Per Unit of Measure.

Update Unit Price based on Sales Price