



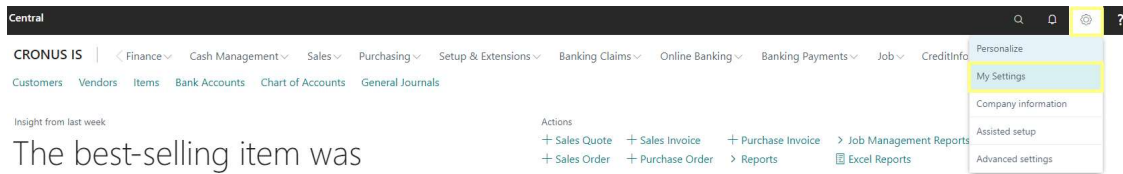
Advania Sales Addons

Setup and instructions

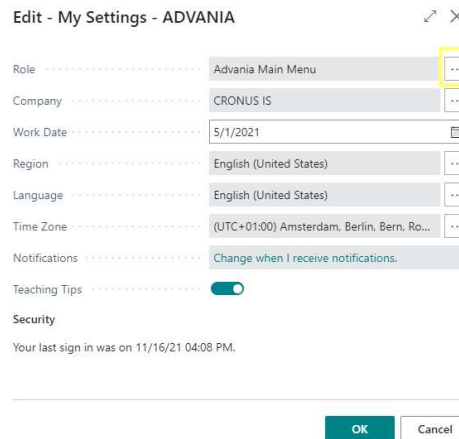
Advania Sales Addons

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

The screenshot shows the Advania main menu with the 'Setup & Extensions' dropdown menu open. The 'Sales Addons Setup' option is highlighted in yellow. The main menu includes sections for 'Insight from last week' (The best-selling item was PARIS-stóll, svartur with 16 units sold), 'Activities' (Sales This Month: kr1,207,020; Overdue Sales Invoice Amount: kr5,806,550; Overdue Purch. Amount: kr3,636), and 'Ongoing Sales' (Sales Quotes: 2, Sales Orders: 4, Sales Invoices: 6, Purchase Orders: 5, Ongoing Invoices: 6, Requests to Approve: 0, Open Approval Entries: 0).

Advania Main Menu – Sales Addons Setup

via Manual Setup page under Setup & Extensions,

The screenshot shows the 'Manual Setup' page. The 'Manual Setup' dropdown is open, and 'Manual Setup' is selected. The table below lists various setup items, with 'Advania - Sales Addons' highlighted in yellow.

Short Title	Extension Name	Description	Category	Keywords	Expected Du
Company	Base Application	Make general company settings.	General	Company	
Countries/Regions	Base Application	Define which countries and regions you tra...	General	Reference data, Country, Region, System	
Accounting Periods	Base Application	Set up the number of accounting periods wi...	Finance	Accounting, Periods	
Advania - H3 Salary Setup	Advania H3 Service	H3 Salary Setup	Human Resources	Salary, H3, IS, Employee	
Advania - Booking Connection	Advania Bokun.is Connection	Set up and define Booking Connection	Sales	Sales, Setup	
Advania - Sales Addons	Advania Sales Addons	Set up and define Sales Addons	Sales	Sales, Addons, Setup	
Advania - Subscription	Advania Subscription Invoices	Set up and define Subscription Invoices	Sales	Subscription, Sales, Invoice	
Advania - Online Banking Setup	Advania Banking Services	Set up and define Bank Solutions	Finance	Bank, Claims, Statements, IOBS	
Advania - Bank Account Service Setup	Advania Banking Services	Set up and define verify bank account format	Finance	Bank, IOBS, Setup	

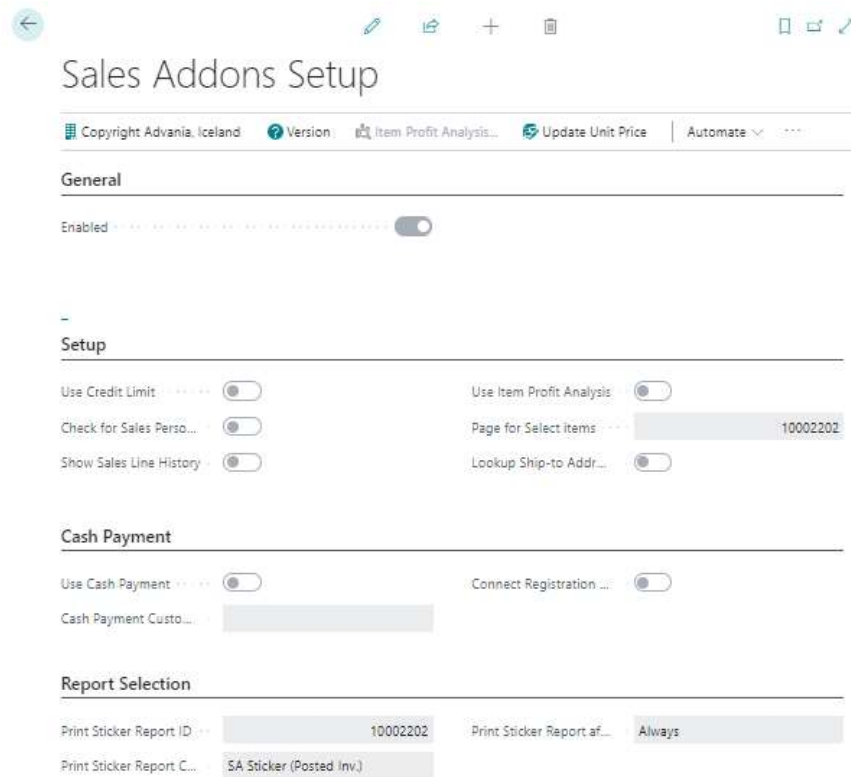
Manual Setup – Advania Sales Addons

or Tell Me search.

The screenshot shows the 'Tell Me search' interface. The search input field contains 'sales add'. Below the input field, under the heading 'Go to Pages and Tasks', the result '> Sales Addons Setup' is highlighted in yellow. At the bottom, there is a message: 'Didn't find what you were looking for? Try exploring pages and reports'.

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

Copyright Advania, Iceland Version Item Profit Analysis... Update Unit Price Automate

General

Enabled

Setup

Use Credit Limit Use Item Profit Analysis
Check for Sales Perso... Page for Select Items
Show Sales Line History Lookup Ship-to Addr...

Cash Payment

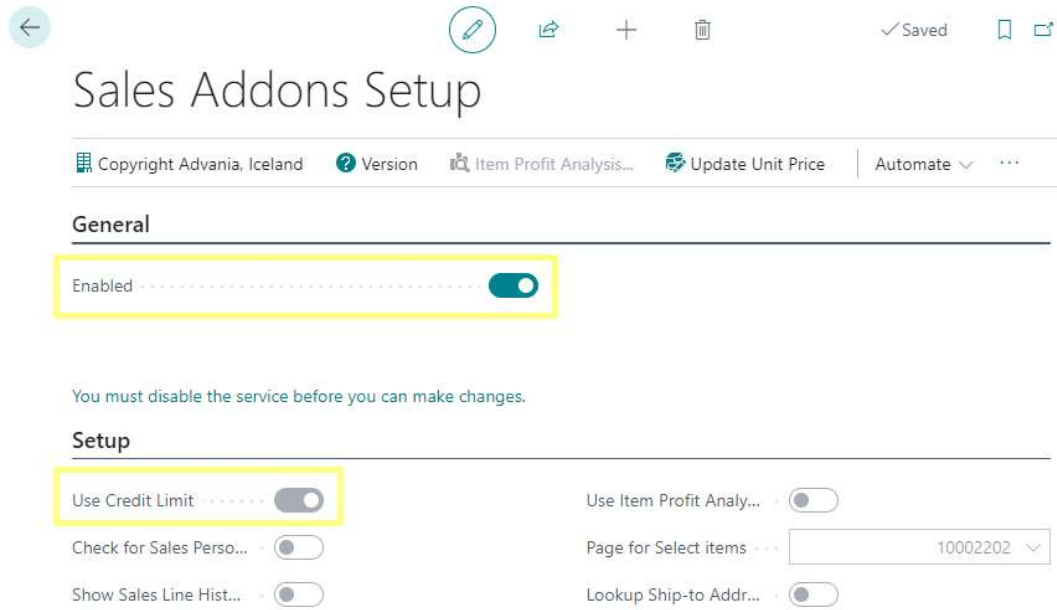
Use Cash Payment Connect Registration ...
Cash Payment Custo...

Report Selection

Print Sticker Report ID Print Sticker Report af...
Print Sticker Report C...

Sales Addons Setup

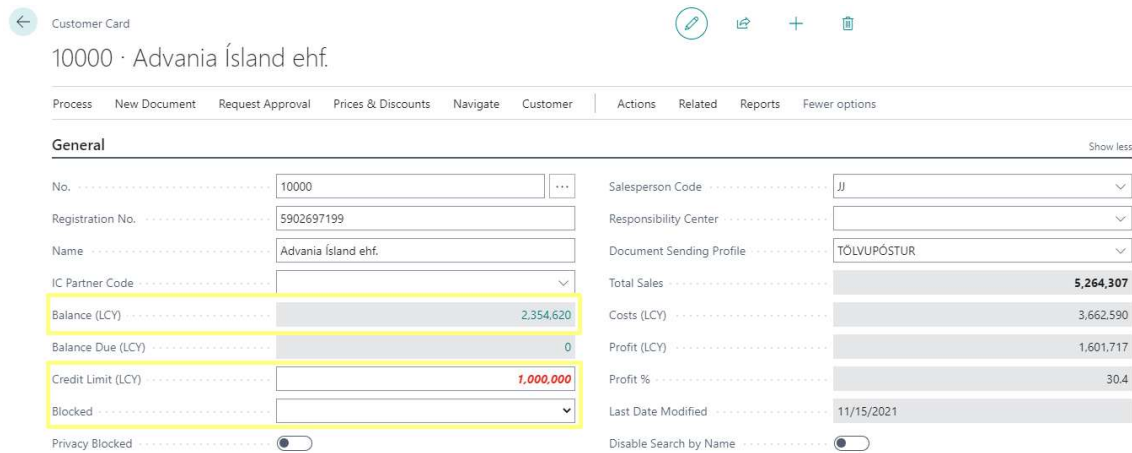
2. INSTRUCTIONS



The screenshot shows the 'Sales Addons Setup' page. At the top, there are navigation icons (back, edit, share, add, delete) and a 'Saved' status. The main title is 'Sales Addons Setup'. Below it, there's a breadcrumb trail: 'Copyright Advania, Iceland' > 'Version' > 'Item Profit Analysis...' > 'Update Unit Price' > 'Automate' > '...'. The 'General' section has a toggle for 'Enabled' which is currently turned on. Below this, a message states: 'You must disable the service before you can make changes.' The 'Setup' section contains several toggles: 'Use Credit Limit' (highlighted with a yellow box and turned on), 'Use Item Profit Analy...' (turned off), 'Check for Sales Perso...' (turned off), 'Page for Select items' (set to '10002202'), 'Show Sales Line Hist...' (turned off), and 'Lookup Ship-to Addr...' (turned off).

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).



The screenshot shows the 'Customer Card' for '10000 · Advania Ísland ehf.'. The 'General' section is expanded, showing various fields. The 'Balance (LCY)' field is highlighted with a yellow box and shows a value of 2,354,620. The 'Credit Limit (LCY)' field is also highlighted with a yellow box and shows a value of 1,000,000. Other fields include 'No.' (10000), 'Registration No.' (5902697199), 'Name' (Advania Ísland ehf.), 'Salesperson Code' (JJ), 'Responsibility Center', 'Document Sending Profile' (TÓLVUPÓSTUR), 'Total Sales' (5,264,307), 'Costs (LCY)' (3,662,590), 'Profit (LCY)' (1,601,717), 'Profit %' (30.4), 'Last Date Modified' (11/15/2021), and 'Privacy Blocked' (turned off).

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 Card

10000 · Advania Ísland ehf.

Process New Document Request Approval Prices & Discounts Navigate Customer Actions Related Reports Fewer o

General Show less

No.	10000	Salesperson Code	JJ
Registration No.	5902697199	Responsibility Center	
Name	Advania Ísland ehf.	Document Sending Profile ..	TÖLVUÞÓSTUR
IC Partner Code		Total Sales	5,264,307
Balance (LCY)	2,354,620	Costs (LCY)	3,662,590
Balance Due (LCY)	0	Profit (LCY)	1,601,717
Credit Limit (LCY)	1,000,000	Profit %	30.4
Blocked	All	Last Date Modified	11/17/2021
Privacy Blocked	<input type="checkbox"/>	Disable Search by Name	<input type="checkbox"/>

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

Copyright Advania, Iceland ? Version Item Profit Analysis... Update Unit Price Automate ...

General

Enabled

You must disable the service before you can make changes.

Setup

Use Credit Limit	<input type="checkbox"/>	Use Item Profit Analy... ..	<input type="checkbox"/>
Check for Sales Perso... ..	<input checked="" type="checkbox"/>	Page for Select items	10002202
Show Sales Line Hist... ..	<input type="checkbox"/>	Lookup Ship-to Addr... ..	<input type="checkbox"/>

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.

← Sales Invoice ✎ ↻ + 🗑

102203 · School of Fine Art

Posting | Prepare | Invoice | Release | Request Approval | Navigate | Actions | Related | Fewer options

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

Customer No.	30000	Posting Date	5/13/2021
Customer Name	School of Fine Art	Interest Date	
Sell-to		Due Date	5/31/2021
Address	Tindaseli 10	External Document No.	
Address 2		Salesperson Code	
City	Miami	Campaign No.	

Posting a sales document with missing Salesperson Code

← Error Messages 🗑 ↻

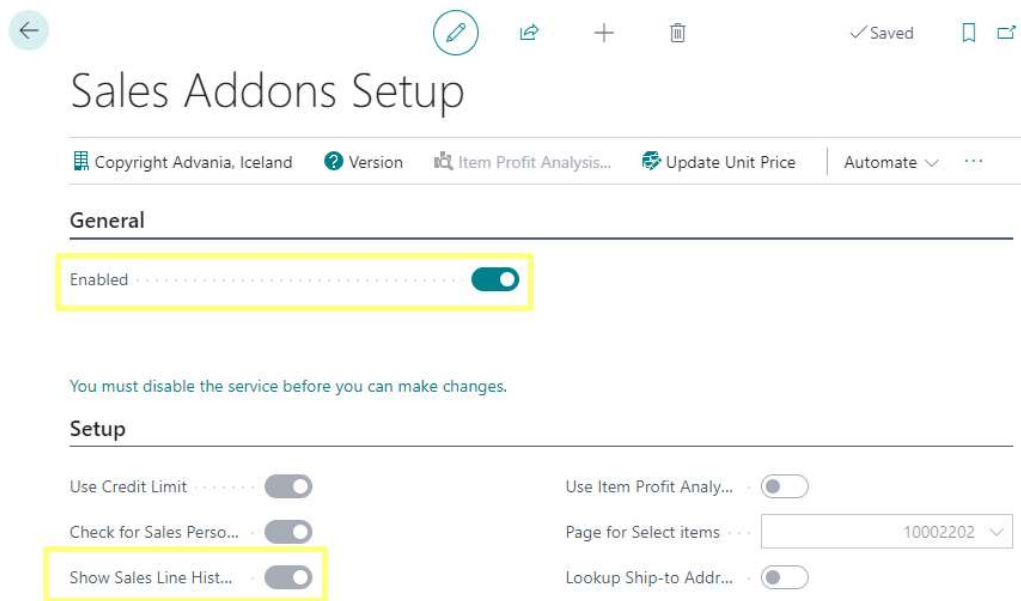
Search | Open Related Record | Actions | Fewer options 🔍 🗑 ☰

Message Type ↑	Description	Context	Conti
Error	<i>Salesperson Code must have a value in Sales Header: Document Type=Invoice, No.=102203....</i>	Sales Header....	

Missing Salesperson Code error message

Sales Lines History

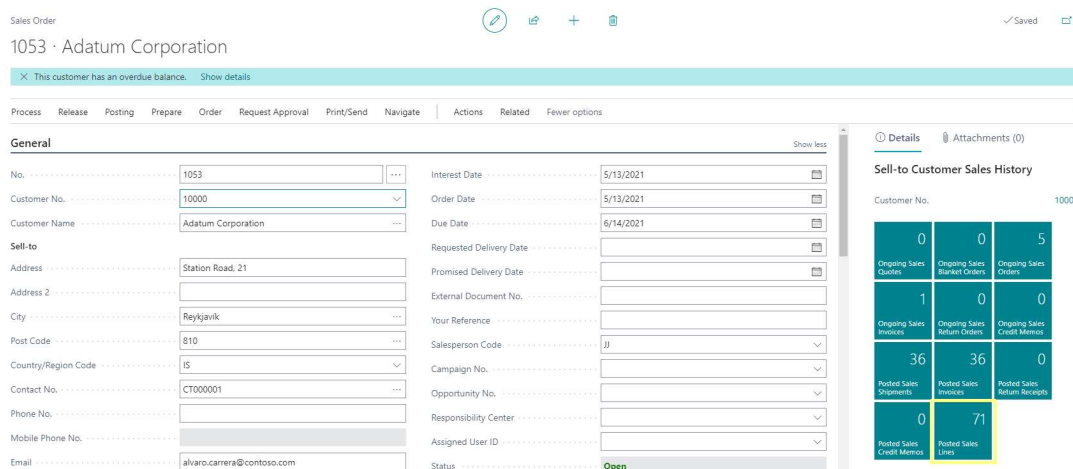
Sales Lines History feature enables the users to see an additional *Posted Sales Lines* box in the Sell-To Customer Sales History factbox when creating a new Sales Order.



The screenshot shows the 'Sales Addons Setup' configuration page. The 'General' section has a toggle for 'Enabled' which is turned on. The 'Setup' section contains several other toggles: 'Use Credit Limit' (off), 'Check for Sales Perso...' (off), 'Show Sales Line Hist...' (off), 'Use Item Profit Analy...' (off), and 'Lookup Ship-to Addr...' (off). A dropdown menu for 'Page for Select items' is set to '10002202'.

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.



The screenshot shows a 'Sales Order' form for customer '1053 · Adatum Corporation'. The 'Sell-to' section contains address and contact information. On the right, the 'Sell-to Customer Sales History' factbox is visible, showing a grid of sales metrics. The 'Posted Sales Lines' metric is highlighted with a yellow box and shows a value of 71.

Sell-to Customer Sales History		
Customer No. 10000		
Ongoing Sales Quotes	0	0
Ongoing Sales Blanket Orders	0	5
Ongoing Sales Orders	0	0
Ongoing Sales Invoices	1	0
Ongoing Sales Return Orders	0	0
Ongoing Sales Credit Memos	0	0
Posted Sales Shipments	36	36
Posted Sales Invoices	36	0
Posted Sales Return Receipts	0	0
Posted Sales Credit Memos	0	71

Sales Addons Setup – Sales Lines History

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

Posted Sales Lines

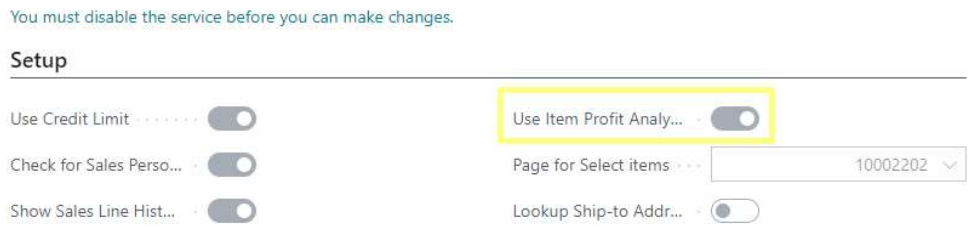
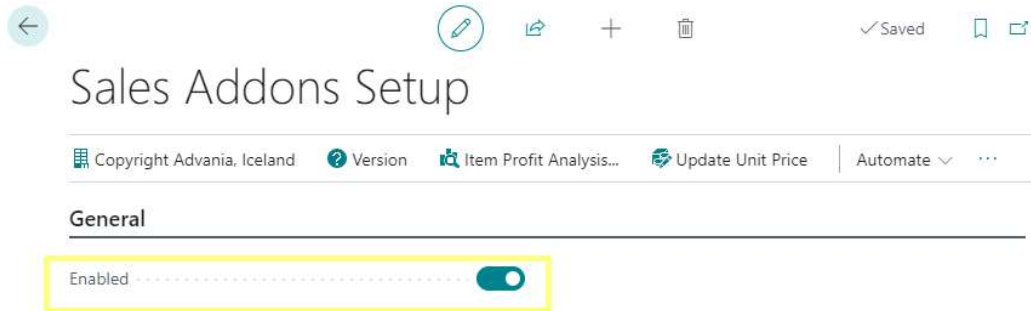
Search + New Edit List Delete

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	1960-5	ROME-stóll, grænn	4	STYKKI	12.570.00		50.280			MEDAL
103007	1/19/2020	Item	1896-5	ATHENS-skrifborð	5	STYKKI	65.260.00		326.300			MEDAL
103007	1/19/2020	Item	1972-5	MUNICH-skrifstóll, gulur	2	STYKKI	12.390.00		24.780			MEDAL
103007	1/19/2020	Item	1996-5	ATLANTA-tússtafla, grunn	4	STYKKI	91.120.00		364.480			MEDAL
103016	2/13/2020	Item	1960-5	ROME-stóll, grænn	4	STYKKI	12.570.00		50.280			MEDAL
103020	2/17/2020	Item	1896-5	ATHENS-skrifborð	7	STYKKI	65.260.00		456.820			MEDAL
103020	2/17/2020	Item	1972-5	MUNICH-skrifstóll, gulur	2	STYKKI	12.390.00		24.780			MEDAL
103020	2/17/2020	Item	1996-5	ATLANTA-tússtafla, grunn	4	STYKKI	91.120.00		364.480			MEDAL
103028	3/14/2020	Item	1960-5	ROME-stóll, grænn	5	STYKKI	12.570.00		62.850			MEDAL

Sales Addons Setup – Sales Lines History

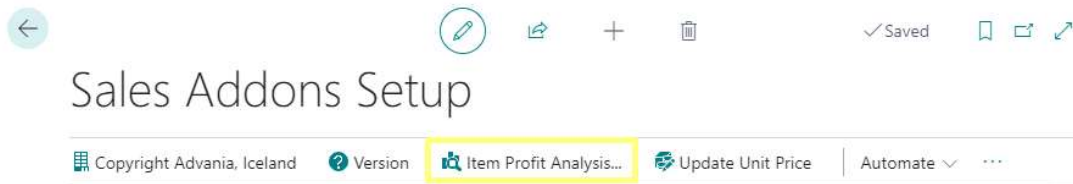
Item Profit Analysis

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

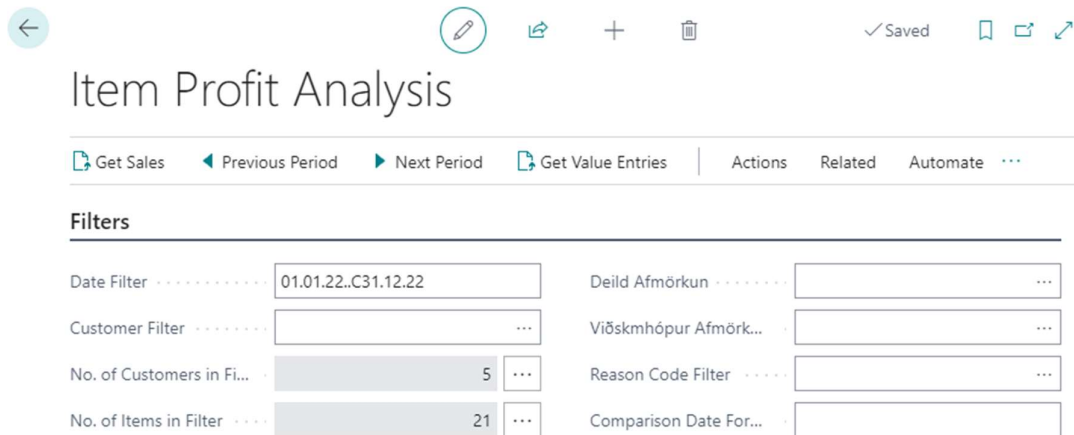


Sales Addons Setup – Item Profit Analysis



Tell me search – Item Profit Analysis

The Item Profit Analysis page will open



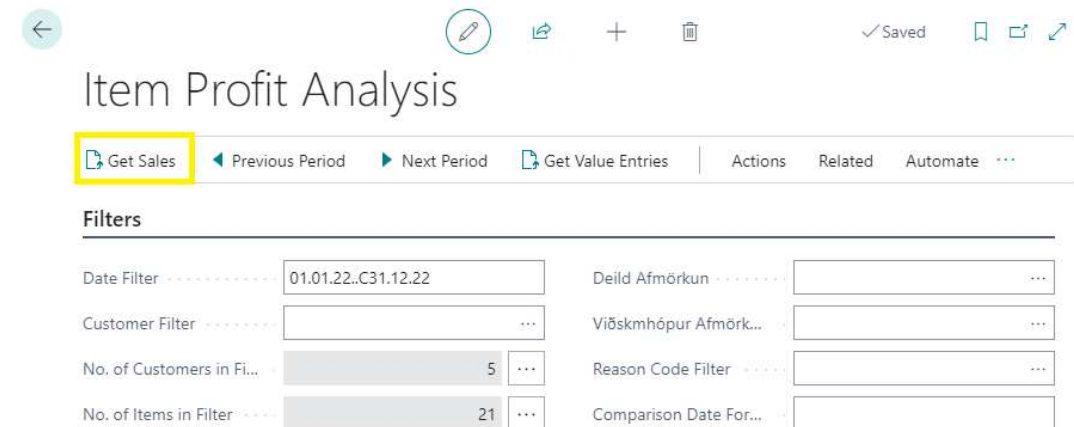
Item Profit Analysis

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

←
📝
🔗
+
🗑️
✓ Saved
📄
🔍

Item Profit Analysis

📄 Get Sales
◀ Previous Period
▶ Next Period
📄 Get Value Entries
Actions
Related
Automate
Fewer options

Filters

Date Filter 01.01.22..C31.12.22	Deild Afmörkun ⋮
Customer Filter ⋮	Viðskmáttur Afmörkun ... ⋮
No. of Customers in Filter .. 5 ⋮	Reason Code Filter ⋮
No. of Items in Filter 21 ⋮	Comparison Date Formula .. ⋮

Description	Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Profit Amount (Actual)	Profit % (Actual)
- Totals -	530	11.739.224,93	8.022.130,00	3.717.094,93	31,66
→ > UNDEFINED - Unknown Catego...	137	1.793.080,00	0,00	1.793.080,00	100,00
> DÓT - Testing	2	2.000,00	0,00	2.000,00	100,00
> HÚSGÖGN - Skrifstofuhúsgögn	322	7.158.464,93	5.849.500,00	1.308.964,93	18,29
> ÝMISL - Ýmislegt	69	2.785.680,00	2.172.630,00	613.050,00	22,01

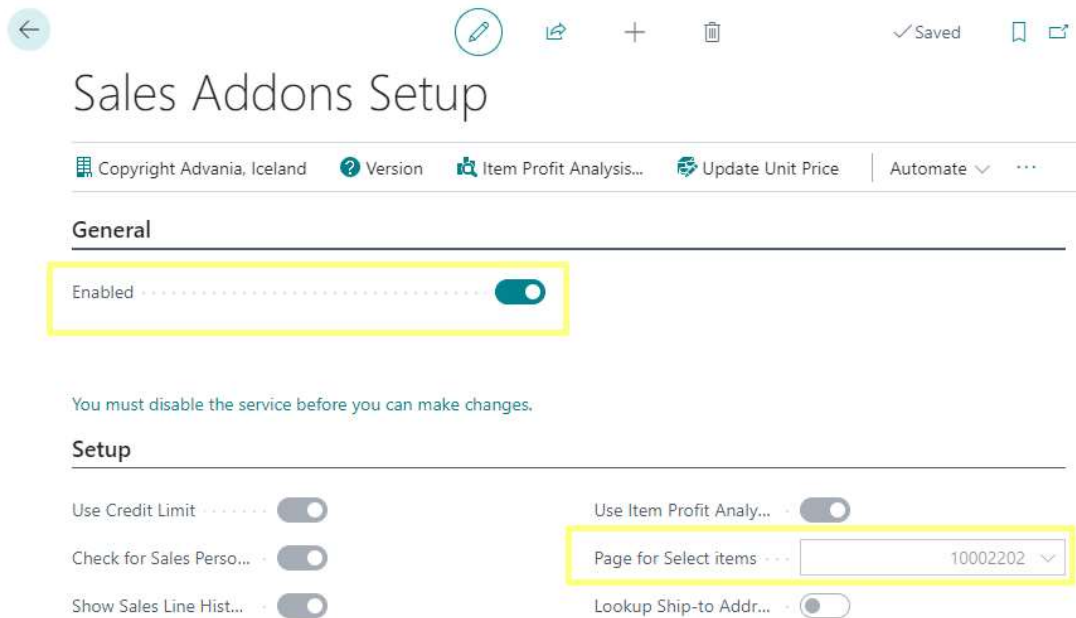
Item Profit Analysis – Information on Categories

Description	Quantity	Sales Amount (Actual)	Lost Amount (Actual)	Profit Amount (Actual)	Profit % (Actual)
- Totals -	530	11.739.224,93	8.022.130,00	3.717.094,93	31,66
→ > UNDEFINED - Unknown Catego...	137	1.793.080,00	0,00	1.793.080,00	100,00
1953-W - Gestahluti 1	49	401.800,00	0,00	401.800,00	100,00
1965-W - Símafundarbúnt 2-8	81	1.235.250,00	0,00	1.235.250,00	100,00
1969-W - Símafundarpakki 1	7	156.030,00	0,00	156.030,00	100,00
> DÓT - Testing	2	2.000,00	0,00	2.000,00	100,00
B10001 - Test	2	2.000,00	0,00	2.000,00	100,00
> HÚSGÖGN - Skrifstofuhúsgögn	322	7.158.464,93	5.849.500,00	1.308.964,93	18,29
1900-S - PARIS-stóll, svartur	34	427.380,60	333.200,00	94.180,60	22,04
> BORÐ - Skrifstofuborð	48	2.880.955,94	2.443.200,00	437.755,94	15,19

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.



General

Enabled

You must disable the service before you can make changes.

Setup

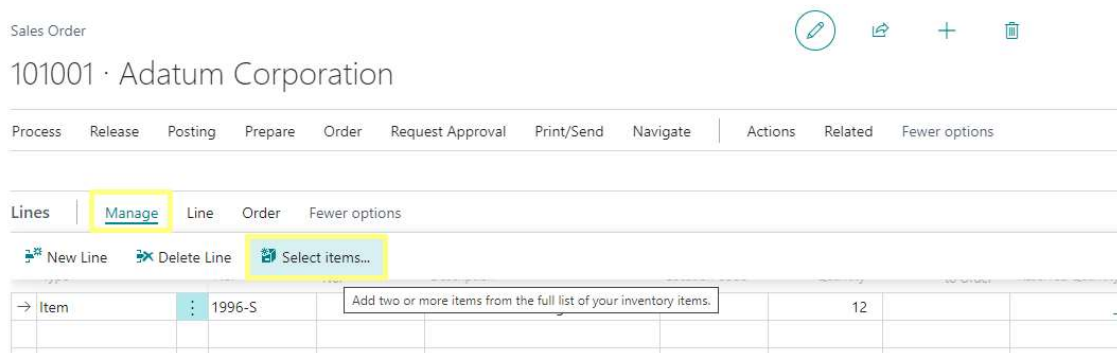
Use Credit Limit Use Item Profit Analy...

Check for Sales Perso... Page for Select items ... 10002202

Show Sales Line Hist... Lookup Ship-to Addr...

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

101001 · Adatum Corporation

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

Lines | Manage | Line | Order | Fewer options

New Line Delete Line Select items...

→ Item	:	1996-S	Add two or more items from the full list of your inventory items.	12		
--------	---	--------	-------------------------------------------------------------------	----	--	--

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			Inventory	-11	No
1906-S	ATHENS-laus fótstallar		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-skrststóll, 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

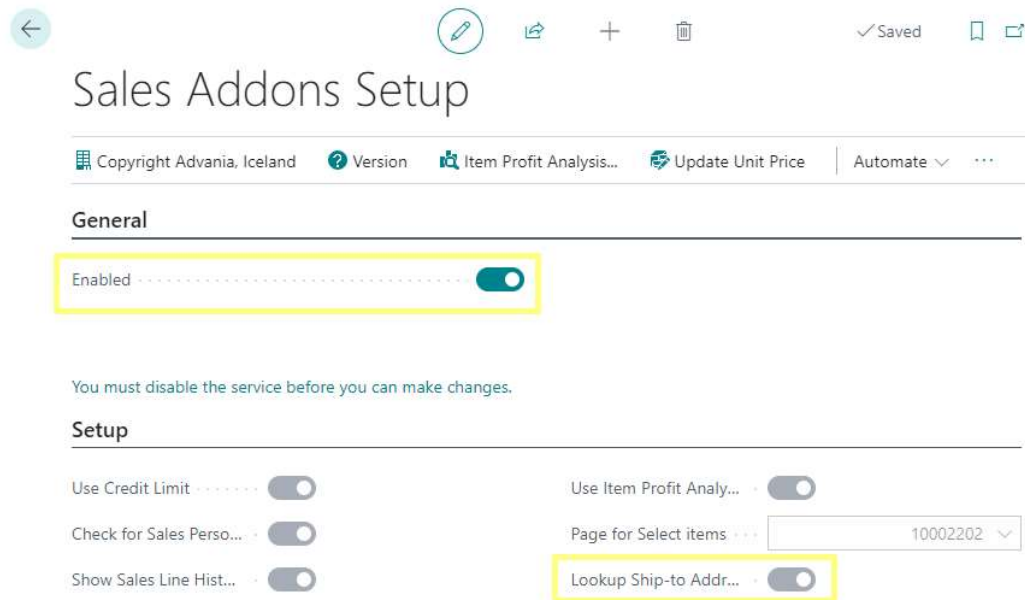
Lines Manage Line Order Fewer options

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.



The screenshot shows the 'Sales Addons Setup' window. The 'General' section has the 'Enabled' toggle switch turned on. The 'Setup' section has several other toggles: 'Use Credit Limit', 'Check for Sales Perso...', and 'Show Sales Line Hist...' are all turned off. 'Use Item Profit Analy...' is turned on. 'Page for Select items' is set to '10002202'. The 'Lookup Ship-to Addr...' toggle is also turned on and highlighted with a yellow box.

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 - 10000 · Adatum Corporation | 🔍 + New ... ↗ ✕

Code ↑	Name	City	Location Code
→ CHELTENHAM	Adatum Corporation	Reykjavik	
REYKJAVÍK	Adatum Corporation	Reykjavik	

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.

Sales Order

1053 · Trey Research

✕ This customer has an overdue balance. Show details

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







Shipping and Billing Show less

Ship-to	Alternate Shipping Address	Bill-to	Default (Customer)
Code	FLEET	Location Code	
Name	Trey Research	Shipment Date	5/13/2021
Address	Beacon Hill Road	Shipping Advice	Partial
Address 2		Outbound Whse. Handling Time	
City	Reykjavik	Shipping Time	
Post Code	131	Late Order Shipping	No
Country/Region	IS	Combine Shipments	<input type="checkbox"/>
Contact			




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.

←   +  ✓ Saved   

Sales Addons Setup

Copyright Advania, Iceland  Version  Item Profit Analysis...  Update Unit Price Automate ▾ ⋮

General

Enabled

You must disable the service before you can make changes.

Setup >

Cash Payment

Use Cash Payment Connect Registration ...

Cash Payment Custo... 10000

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

1002 · Advania Ísland ehf.

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

Poststod Shipment Apply National Register... Create Inventory Put-away/Pick...

Customer No.	10000	Your Reference	
Contact	Alvaro Carrera	Salesperson Code	JJ
No. of Archived Versions	0	Campaign No.	
Document Date	5/1/2021	Opportunity No.	
Posting Date	5/1/2021	Responsibility Center	
Interest Date	5/1/2021	Assigned User ID	
Order Date	5/1/2021	Status	Open
Due Date	6/1/2021	Job No.	
Requested Delivery Date		Work Description	
Promised Delivery Date			
External Document No.			

Cash Payment Customer Information	
Registration No.	5902697199
Name	
Address	
Post Code	
City	

Sales Order – Cash Payment and Apply Natonal Register

Sales Order

1002 · Advania Ísland ehf.

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

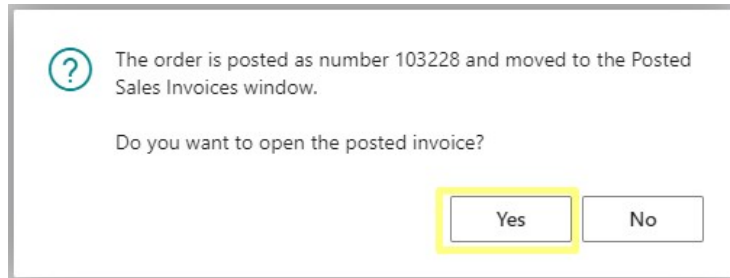
General Show less

Customer No.	10000	Your Reference	
Contact	Alvaro Carrera	Salesperson Code	JJ
No. of Archived Versions	0	Campaign No.	
Document Date	5/1/2021	Opportunity No.	
Posting Date	5/1/2021	Responsibility Center	
Interest Date	5/1/2021	Assigned User ID	
Order Date	5/1/2021	Status	Open
Due Date	6/1/2021	Job No.	
Requested Delivery Date		Work Description	
Promised Delivery Date			
External Document No.			

Cash Payment Customer Information			
Registration No.	5902697199	Post Code	105
Name	Advania Ísland ehf.	City	Reykjavik
Address	Guðrúnartúni 10		

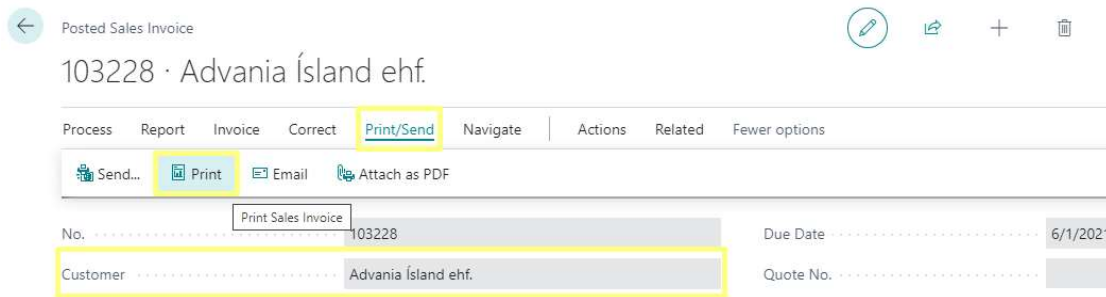
Sales Order – Cash Payment Infomration after running Apply Natonal Register

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

Printer (Handled by the browser) ▾

Options >

Filter: Posted Sales Invoice

× No. 103228 ▾

× Sell-to Customer No. ▾


× No. Printed ▾

+ Filter...

Advanced >

Send to... Print Preview Cancel

SA Sales - Invoice – request page




Advania Ísland ehf.
Alvaro Carrera
Guðrúnartúni 10
105 Reykjavík
Ísland

Sales - Invoice
 Page 1 of 1

CRONUS IS
 Vinland 1
 Vesturbæ
 999 Vesturvík

Kennitala	5902697199	Invoice No.	103228
Reikn.færlist á viðskm.	10000 / 5902697199	Phone No.	+354 999 9999
VSK-númer	108513	E-Mail	hugi@advaniabc.onmicrosoft.com
		Home Page	
		VAT Reg. No.	777777777
Pöntunarnr.	1002	Reg. No.	5902697199
Posting Date	maí 1, 2021	Bank	Þjóðarbankinn
Interest Date	maí 1, 2021	Númer bankareikn	99-099888
Due Date	júní 1, 2021		
Payment Terms	1 Mánuður / 2% afsl. innan 8 daga	Salesperson	Jóhannes Jóhannsson

Nr.	Lýsing	QTY	UOM	Unit Price	VAT	Amount
1896-S	ATHENS-skrifborð	1	Stykki	65,260	HEFDB,	65,260
Total ISK Excl. VAT						65,260.00
24% VSK						15,662.00
Total ISK Incl. VAT						80,922.00

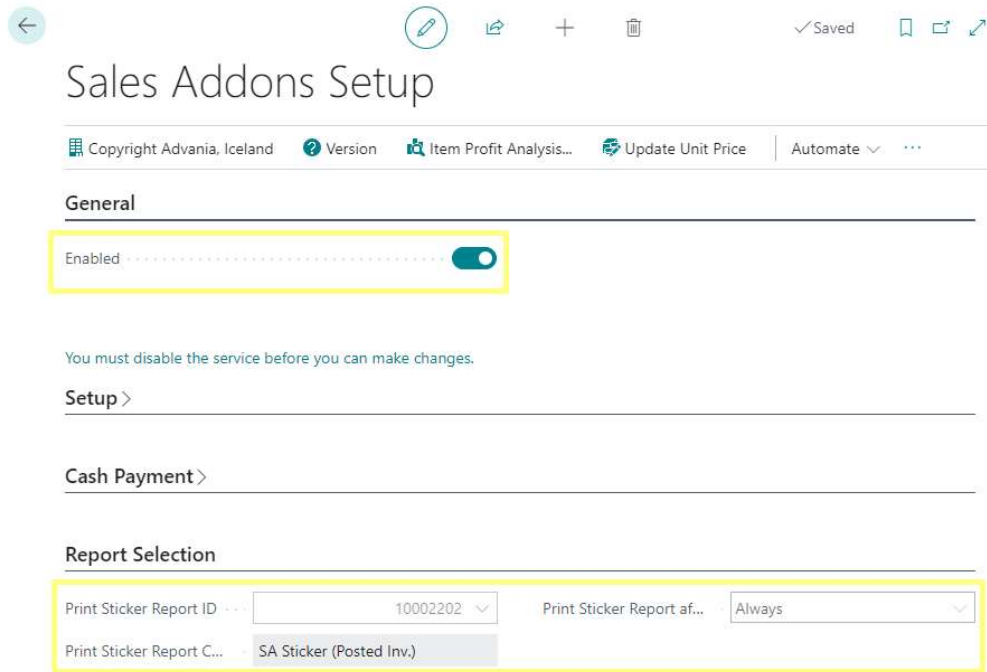

Borga með WorldPay (Athugaðu: Þú ert í tilraunafyrirtæki og þetta er ekki raunverulegur reikningur. Ekki er hægt að borga reikninginn í raun.)

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**.



← [edit] [share] [add] [trash] ✓ Saved [refresh] [print] [share]

Sales Addons Setup

Copyright Advania, Iceland | Version | Item Profit Analysis... | Update Unit Price | Automate ▾ ...

General

Enabled:

You must disable the service before you can make changes.

[Setup >](#)

[Cash Payment >](#)

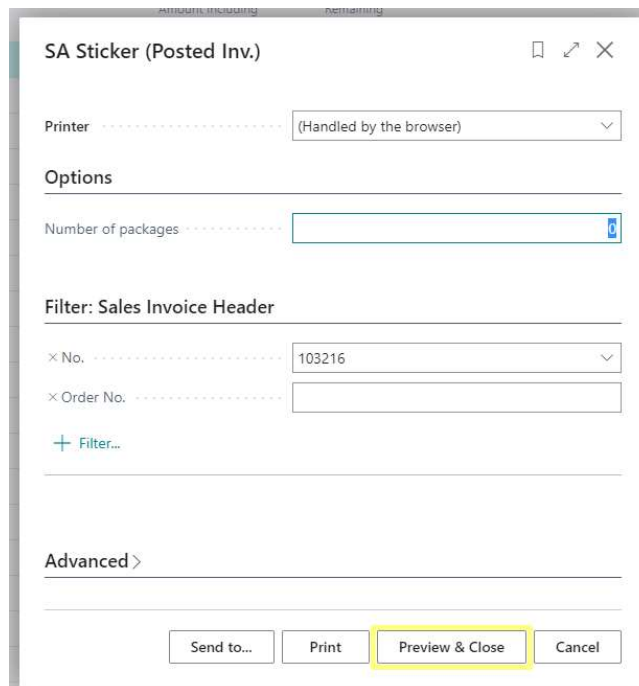
Report Selection

Print Sticker Report ID: 10002202 | Print Sticker Report af...: Always

Print Sticker Report C...: SA Sticker (Posted Inv.)

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*.



SA Sticker (Posted Inv.) [refresh] [share] [close]

Printer: (Handled by the browser)

Options

Number of packages:

Filter: Sales Invoice Header

× No.: 103216

× Order No.:

+ Filter...

Advanced >

Send to... | Print | **Preview & Close** | Cancel

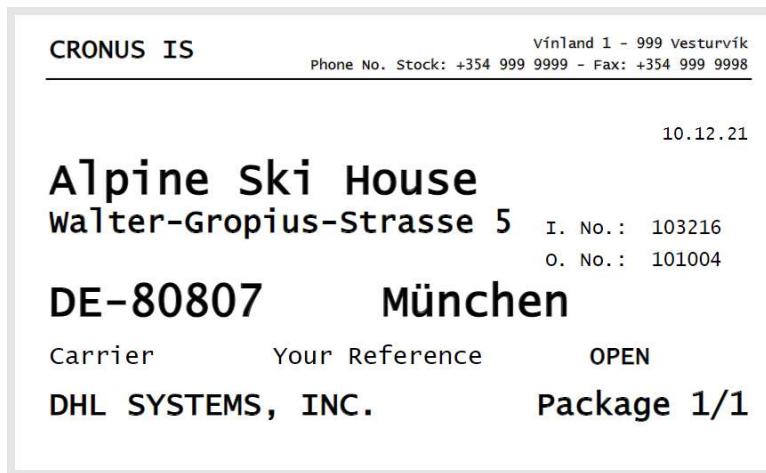
Print Sticker report – request page

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?

Yes No



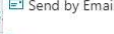
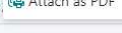
Print Sticker report confirmation



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.

CRONUS IS | Setup | ☰

No.	Customer No.	Customer Name	Currency Code	Due Date	Print/Send	Actions	Related	Fewer options
103216	40000	Alpine Ski House		6/13/2021			37,170	
103215	30000	School of Fine Art	USD	4/30/2021			15.00	
103217	30000	School of Fine Art		4/30/2021			337,920	
103198	30000	School of Fine Art		4/30/2021			124,260	
103197	50000	Relecloud		4/14/2021	189,570	235,067	235,067	

Run Print Sticker report from Posted Sales Invoices



Posted Sales Invoice

103216 · Alpine Ski House

Process Invoice Correct **Print/Send** Navigate Actions Related Fewer options

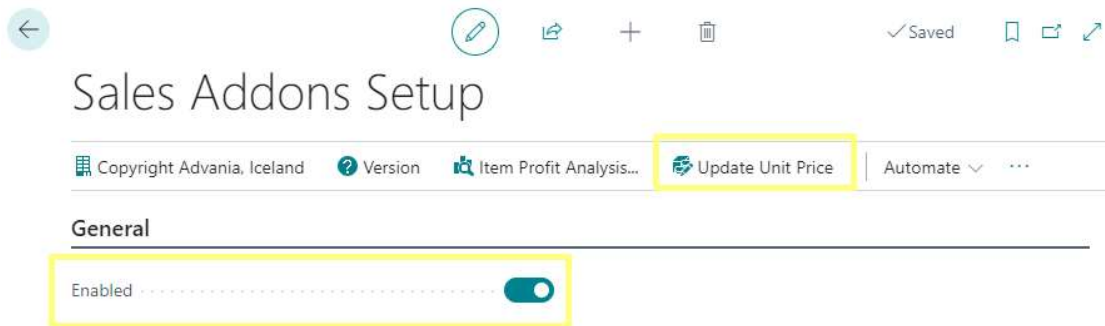
Send... **Print Sticker** Print... Email Attach as PDF

No.	103216	Due Date	6/13/2021
Customer	Alpine Ski House	Quote No.	
Sell-to		Order No.	101004
Address	Walter-Gropius-Strasse 5	Pre-Assigned No.	
Address 2	Park Stadt Schwabing	External Document No.	

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

Copyright Advania, Iceland ? Version Item Profit Analysis... **Update Unit Price** Automate ...

General

Enabled

You must disable the service before you can make changes.

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 what you want to do ↗ ✕

update unit

On current page (Sales Addons Setup)

Go to Pages and Tasks

> SA Update Unit Price
Tasks

Documentation

Didn't find what you were looking for? Try [exploring pages and reports](#)

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.

SA Update Unit Price ↗ ✕

Options

Update Unit Price From ▾

Filter: Sales Line

× Document Type ▾

[+ Filter...](#)

Update Unit Price – Request Page

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

? Update Unit Price in Sales Order lines based on Item?

Yes

No

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

i 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 recalculated by multiplying Item Unit Price and Qty. Per Unit of Measure.

The screenshot shows the 'Item Card' for '1968-S · MEXICO-skrifstóll, svartur'. The 'Prices & Sales' section is highlighted, showing the 'Unit Price' set to 12,390.00. A dropdown menu is open for 'Sales Unit of Measure', showing 'SAFN' selected with a 'Qty. per Unit of Measure' of 4. Other visible fields include 'Base Unit of Measure' (STYKKI), 'Purchasing Code', and 'Variant Mandatory if Exists' (Default (No)).

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 recalculated by multiplying Unit Price from the Sales Price and Qty. Per Unit of Measure.

The screenshot shows the 'Item Card' for '1968-S · MEXICO-skrifstóll, svartur' with the 'Sales Prices' section active. A table lists sales prices for item 1968-S. The 'Unit of Measure Code' is highlighted as 'SAFN' with a 'Qty. per Unit of Measure' of 4. The 'Unit Price' is 1,000.00 and the 'Starting Date' is 1/1/2021.

Sales Type ↑	Sales Code ↑	Item No. ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Unit Price	Starting Date ↑	Ending Date
→ All Cust		1968-S	SAFN	0	1,000.00	1/1/2021	12/31/2022

Update Unit Price based on Sales Price