



yaveon

Yaveon 365

Sales and Purchase

Sales and Purchase
in Business Central

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Microsoft
Partner

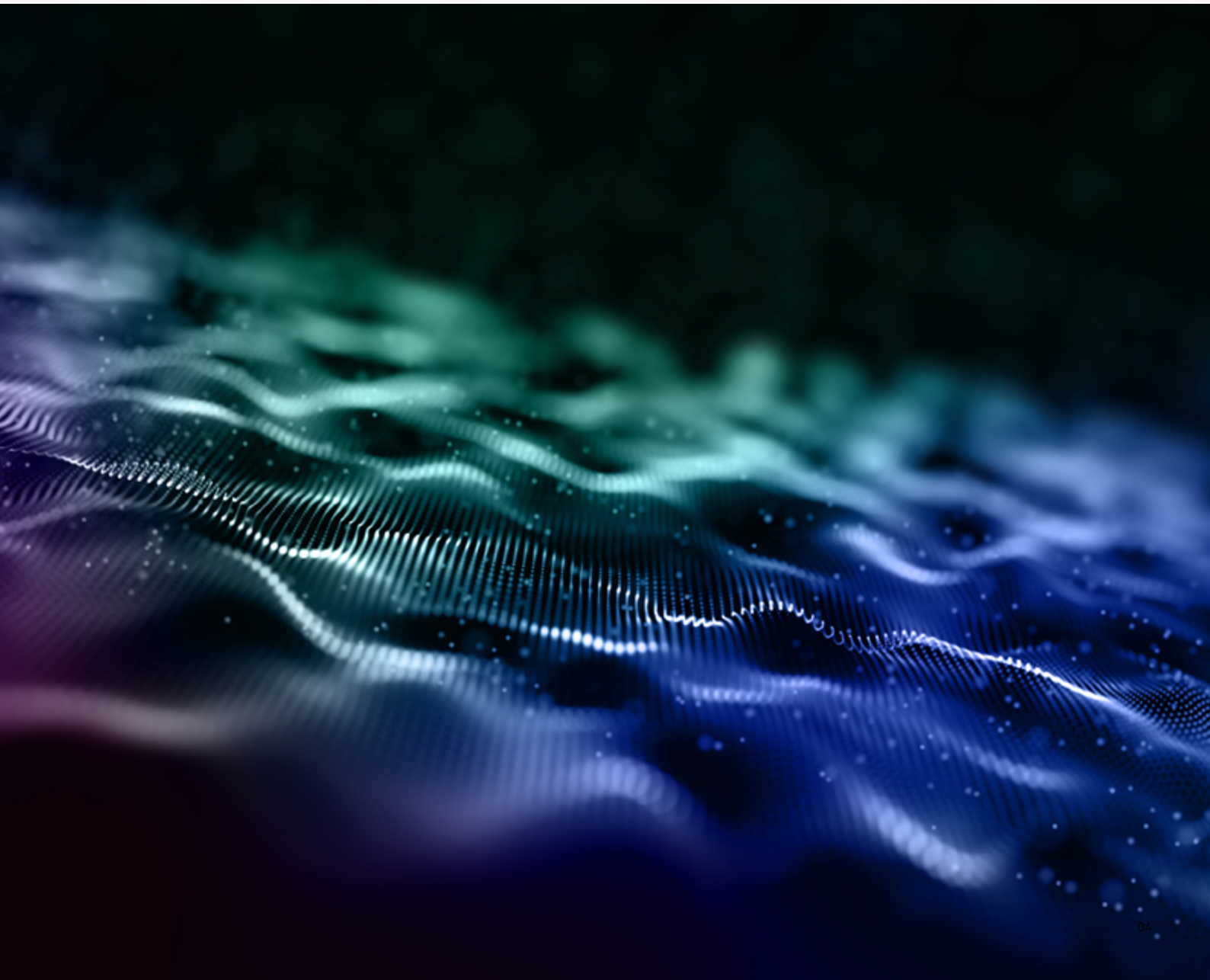
Everything at a Glance.

Product

- Product: ERP
- Basis: Microsoft Dynamics 365 Business Central
- Company size: Small and medium-sized companies
- Industries: Chemicals, pharmaceuticals, biotechnology, cosmetics, food, medical technology

The Three Most Important Advantages:

- Delivery tolerances
- Purchasing & sales qualifications
- Extension of blanket orders and blanket purchase orders



How Does This Work Exactly?

The Features.

Adjust the Delivery Quantity

Delivery tolerances allow you and your supplier to adjust the delivery quantity during the delivery process within agreed tolerances. This feature is particularly useful when dealing with bulk materials, where accurate measurement of quantities is not always possible.

Make Compliance Easy

The creation of country-specific VAT registration numbers is enabled, and account assignment and tax rate determination are automated. Now you can show the actual flow of goods between different countries for tax purposes, as required by European tax law, without having to manually access the document.

Handle Purchasing

The Purchase Quote Manager allows you to conveniently create purchase requests, send them to multiple vendors, then select the best offer and generate a purchase order.

Keep an Overview

A purchase line list and a sales line list make it easier to track all sales and purchasing activities by eliminating the need to scroll through multiple documents. These lists can be filtered, searched, sorted, and exported for easy analysis.

Keep Control

With Sales and Purchase, you can limit the number of suppliers from which an item can be purchased using Purchase Approval for Items. Similarly, the number of customers allowed to buy an item can be restricted with Sales Approval for Items – a feature especially useful when licenses or permits are required, such as in the pharmaceutical retail sector.

Stay Up to Date

When planning or creating purchasing or sales documents, use the tools provided by blanket orders, such as contract validity periods, outstanding call-off quantities, and existing blanket order information.

Business Central

PB365 V17 W1 TEST (2.0) | Home | Master Data | Setup

Purchase Lines List | All | Search | Show Document | Reservation Entries | Item Tracking Lines | Traffic Light Control | Open in Excel | More options

Document Type	Docu. No.	Traffic Light	Buy-from Vendor No.	No.	Description	Quantity	Unit of Meas. Code	Outstanding Quantity	Expected Receipt Date	Unit Price (€)	Line Amount Excl. VAT	Location Code
Order	106235	●	K00040	E1200000	Syloid	20.400	KG	0	09.09.2020	0,00		MUNICH
Order	106235	●	K00040	E1200003	Pure water	5.500	L	0	09.09.2020	0,00		MUNICH
Order	106235	●	K00040	E1200004	API YAVIPROFEN	770	KG	0	09.09.2020	0,00		MUNICH
Order	106236	●	K00050	E1200005	Instruction Leaflet	9.000	PCS	0	25.09.2020	0,00		MUNICH
Order	106237	●	K00040	E1200000	Syloid	5.000	KG	0	25.09.2020	0,00	75.000,00	MUNICH
Order	106237	●	K00040	E1200001	Ethanol	1.000	L	0	25.09.2020	0,00	12.000,00	MUNICH
Order	106237	●	K00040	E1200004	API YAVIPROFEN	500	KG	0	25.09.2020	0,00	39.500,00	MUNICH
Order	106240	●	K00050	E1300000	YAVINIGHT 50ml	2.400	PCS	2.400	22.09.2020	0,00	48.000,00	MUNICH
Order	106243	●	K00050	E1200002		5	KG	0	16.09.2020	0,00		MUNICH
Order	106243	●	K00050	E1200002	Pharmacost	8	KG	8	16.09.2020	0,00		MUNICH
Order	106244	●	K00050	E1200002		10	KG	0	16.09.2020	0,00		MUNICH
Order	106249	●	K00070	E1200000	Syloid	210	KG	210	16.01.2021	0,00	885,20	MUNICH
Order	106249	●	K00070	C1300010	Label	150	PCS	150	16.01.2021	0,00	15,00	MUNICH
Order	106249	●				0		0		0,00		
Order	106250	●	K00090	C1000001	YAVICOLOUR blue	2.500	L	2.500	04.11.2020	0,00	15.000,00	COLOGNE
Order	106250	●	K00090	C1000002	YAVICOLOUR red	1.250	L	1.250	04.11.2020	0,00	6.250,00	COLOGNE
Order	106251	●	K00070	C1000002	YAVICOLOUR red	2.500	L	2.500	04.11.2020	0,00	12.500,00	BERLIN
Order	106251	●	K00070	C1000001	YAVICOLOUR blue	1.500	L	1.500	04.11.2020	0,00	9.000,00	BERLIN
Order	106252	●	K00100	C1000001	YAVICOLOUR blue	1.200	L	0	05.11.2020	0,00	7.200,00	COLOGNE
Order	106252	●	K00100	C1000002	YAVICOLOUR red	1.200	L	0	05.11.2020	0,00	6.000,00	COLOGNE
Order	106253	●	K00040	E1200000	Syloid	211.469	KG	211.469	30.09.2020	0,00	892,40	MUNICH

Purchase Lines

Purchase Quote Manager Card

0002

Quotes | Quote View | Create Orders

Manage | Line | Fewer options

No. Description

0001 YAVICOLOUR blue

0002 YAVICOLOUR red

Purchase Quote Manager Quote View

✓ Saved

General

Quote No. PQM0002

✓ Assign | Open in Excel | More options

Item No.	Description	Vendor No.	Vendor Name	Quote No.	Order No.	Quantity	Unit of Meas. Code	Req. Rev.
→ C1000001	YAVICOLOUR b...					0		
		K00040	Alphapharm GmbH	1017	106271	1,000	L	31,0
		K00050	Pharma Print	1018		1,000	L	31,0
		K00050	Alpine Ointment Co...	1019		1,000	L	31,0
✓ C1000002	YAVICOLOUR r...					0		
		K00040	Alphapharm GmbH	1017	106271	1,000	L	31,0
		K00050	Pharma Print	1018		1,000	L	31,0

Received Receipt Vendors Assigned Vendors

021 3 K00040

2 K00040

Purchase Quote Manager

Dynamics 365 Business Central

Blanket Sales Order

1005 · Van Bommel Pharmacy Utrecht

Process Request Approval Print/Send Release Order More options

General Show more

Customer Name: Van Bommel Pharmacy Utrecht

Contact:

No. of Archived Versions: 0

Retrieve Invoice Discount autom.: ☒

Document Date: 05.01.2020

Due Date: 25.01.2020

Order Date: 05.01.2020

External Document No.:

Salesperson Code:

Campaign No.:

Responsibility Center:

Assigned User ID:

Status: Released

Lines Manage Line Functions Power options

Type	No.	Description	Quantity	Mineral Quantity to Call-Off	Qty. in Call-Off Orders	Outstanding Qty to Call-Off	Contract Fulfillment %	Unit of Measure Code	Shipment Date	Starting Date	Ending Date	Unit Price Excl. VAT	Line Amount Excl. VAT	Qty. to Ship	Quantity Shipped
Item	E1300002	YAWNIGHT 100ml	20	2	6	12	10.00	CARTON	01.03.2020	01.01.2020	31.12.2020	4,250.00	85,000.00	18	2
Item	E1300002	YAWNIGHT 100ml	5	0	0	5	0.00	CARTON	01.06.2020	01.01.2020	31.12.2020	4,250.00	20,825.00		
Item	E1300002	YAWNIGHT 100ml	5	0	0	5	0.00	CARTON	01.09.2020	01.01.2020	31.12.2020	4,250.00	20,825.00		

Subtotal Excl. VAT (EUR): 124,950.00

Total Excl. VAT (EUR): 124,950.00

Inv. Discount Amount Excl. VAT (EUR): 0.00

Total VAT (EUR): 31,237.50

Blanket Sales Order

Yaveon 365 Base

Set Up [Traffic Light Rules](#) for Tables

Red, yellow, green - we all know the traffic light principle. In the Base app, the colors make your life easier by acting as a visual reinforcement.

Define traffic light rules that change the colors based on values. For example, you can specify that fully delivered sales orders are indicated in green, while undelivered orders are indicated in red. Select the rules in the list view to highlight records.

You can set up the traffic light rules for the following tables:

- Items
- Vendors
- Customers
- Inventory Summary
- Purchase Lines
- Sales Lines

Set Up [Extended Texts](#)

Whether for master data or purchase and sales documents: Define extended texts for accounts payable, customers, G/L accounts, items, and resources. You want an automatic transfer to purchase and sales documents? No problem. Discover even more benefits by using extended texts in other Yaveon apps, for example, Research and Development, Warehouse Management, Sales & Purchase, and Quality Assurance.

Set Up [Master Data Features](#)

Assign features with a specific value to an item. You can also set up features whose value is calculated via a formula based on the values of other features. Do you want to search for items with specific features? Just use the feature search. You can filter an item list so that only the items that match the criterion are displayed. For even more benefits, combine the function with other Yaveon apps, for example, Quality Assurance and Manufacturing.

Features

Search + New Manage Card Comments Open in Excel More options

No. #	Description	Target Value	Unit of Measure Code	Data Type	Feature Type	Calcul... Feature	Calculation Formula	Rounding Type	Status	Quality Assura...	Transfer to next Level	Next Level Calc. Type	Prods...	Resear... & Devel...
DETEX	detex		GR/10000M	Decimal	MA001	☐		Nearest	Certified	☐	☒	Average	☒	☒
F000001	Labeling	OK		Option	MA017	☐		Nearest	Certified	☒	☐		☐	☐
F000002	Packaging	OK		Option	MA017	☐		Nearest	Certified	☒	☐		☐	☐
F000003	Certificate	ATTACHED		Option	MA017	☐		Nearest	Certified	☒	☐		☐	☐
F000004	Shipping Note	ATTACHED		Option	MA017	☐		Nearest	Certified	☒	☐		☐	☐
F000005	Content of active ingre...	%		Decimal	MA002	☐		Nearest	Certified	☒	☒	Average	☒	☐
F000006	PH-Value	+7.0		Decimal	MA015	☐		Nearest	Certified	☒	☐		☒	☐
F000007	Salt Content	4.00	%	Decimal	MA003	☐		Nearest	Certified	☒	☐		☒	☐
F000008	Methanol	%		Decimal	MA015	☐		Nearest	Certified	☒	☐		☒	☐
F000009	Optical rotation	0.0		Decimal	MA002	☐		Nearest	Certified	☒	☐		☒	☐
F000010	Energy kJ		KJ	Decimal	MA014	☒	F000011 + F00001...	Nearest	Certified	☒	☐		☒	☐
F000011	Fat		GR	Decimal	MA009	☐		Nearest	Certified	☒	☒	Additive	☒	☐
F000012	Sugar		GR	Decimal	MA010	☐		Nearest	Certified	☒	☒	Additive	☒	☐
F000013	Ethanol		GR	Decimal	MA015	☐		Nearest	Certified	☒	☒	Additive	☒	☐
F000014	Colour			Option	MA016	☐		Nearest	Certified	☐	☐		☒	☐
F000015	API YAVIPROFEN		MG	Decimal	MA002	☐		Nearest	Certified	☒	☒	Additive	☒	☐
F000016	Air pressure measurem...		BAR	Decimal	MA020	☐		Nearest	Certified	☒	☐		☒	☐
F000017	Zero Setting		GR	Decimal	MA020	☐		Nearest	Certified	☒	☐		☒	☐
F000018	10g		GR	Decimal	MA020	☐		Nearest	Certified	☒	☐		☒	☐

Features

Inventory Summary

Search Traffic Light Control Product Labels ProBatch Item Tracing Lot No. Info Card Item Ledger Entries Warehouse Entries Open in Excel

Traf... Light	Item No. ▼	Item Description	Lot No.	Serial No.	Location Code	Zone Code	Bin Code	Quantity (Base)	Base Unit of Meas... Code	Load Carrier No.	Load Carr... Type	Status	Date Entry
●	E1200004	API YAVIPROFEN	LOT000081		BERLIN			280	KG			QUARANTINE	16.09
●	E1200004	API YAVIPROFEN	LOT000103		MUNICH	RECEIVE	REC-01	1,500	KG			QUARANTINE	15.12
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...	1,000	PCS	PAL000243	EURO	QC	08.09
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...	1,000	PCS	PAL000244	EURO	QC	08.09
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...	1,000	PCS	PAL000245	EURO	QC	08.09
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...	1,000	PCS	PAL000246	EURO	QC	08.09
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...	1,000	PCS	PAL000247	EURO	QC	08.09
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...	1,000	PCS	PAL000248	EURO	QC	08.09
●	E1200005	Instruction Leaflet	LOT000018		MUNICH	RM	RM-02-02-...	3,000	PCS			QUARANTINE	09.09
●	E1200005	Instruction Leaflet	LOT000054		BERLIN			1,000	PCS			QUARANTINE	16.09
●	E1200005	Instruction Leaflet	LOT000096		MUNICH	RECEIVE	REC-01	50	PCS			QUARANTINE	04.11
●	E1300000	YAVINIGHT 50ml	2020703		MUNICH	SHELF	SH-01-01-02	50	PCS	PAL000205	EURO	RELEASED	01.09
●	E1300000	YAVINIGHT 50ml	LOT-0069		MUNICH	PICK	KO-02-08-01	1,210	PCS			RELEASED	14.09
●	E1300000	YAVINIGHT 50ml	LOT-0072		UTRECHT			6,250	PCS			RELEASED	20.09
●	E1300000	YAVINIGHT 50ml	LOT-0073		BERLIN			3,125	PCS			RELEASED	20.09
●	E1300000	YAVINIGHT 50ml	LOT-0074		BERLIN			1,000	PCS			QUARANTINE	16.09
●	E1300001	YAVI Bears	LOT000021		MUNICH	PICK	KO-02-08-01	39,400	PCS			RELEASED	15.09
●	E1300001	YAVI Bears	LOT000028		UTRECHT			60,000	PCS			RELEASED	15.09

Inventory Summary with Traffic Lights

Set Up a [Corporate Design](#) for Your Documents

Choose the layout that suits your company best and use it for diverse purchase, sales, and stock transfer documents.

Do you need the edited document in another language? No problem. Simply choose from the languages assigned to the labels for fields and columns and add document and field names. With one click, the finished document is ready. To add information, choose which columns and fields to print on the document.

If you don't like the order of the columns, just change them according to your preference. For even more benefits, extend the function for other Yaveon apps, for example, Trade, HazMat Connect, Warehouse Management, Manufacturing, and Lot Management.

Get an [Overview](#) With the Inventory Summary

With the Inventory Summary, you always have an overview of the current inventory - sorted by item, batch, location, and storage space.

Would you like an up-to-date status report of your inventory? You've got it - because all of the information about your inventory is in one place and is automatically updated with every posting. It is your information center for warehouse managers, clerks, and production planners.

For even more benefits, add columns for other Yaveon apps, for example, Lot Management, Warehouse Management, Manufacturing und HazMat Connect.

Extend the [Authorization Management](#) of Microsoft Dynamics 365 Business Central

Do you want to combine permission sets in the system and even be able to exclude certain rights? With Permission Set Management, this is possible.

General

Default Language	ENG	No copy Data run	☒
Default Date Format	304	Line No divisor for POS	
Example for default d...	19. May 2021	Proforma Invoice No.	Order No

Report Print Details

Print Logo	☒	Print Blanket Sales Or...	☒
Logo alignment in do...	Right	Length of Description	0
Print Return Address	☒	Print Description 2	☒
Print Footer	☒	Print Assembly Comp...	☒
Footer height - maxi...	0	Print Tracking Inform...	☒
Don't Print to Desktop	☒	Print Extended Text	☒

Corporate Design Setup

Role ID ↑		Name	
	BASE_ACCESS_TRAINING		Ergänzung zu SuperData
	PB365 LM QP		PB Qualified Person
	PB365 LM QS		PB Quality Supervisor
→	SAL-REP	⋮	Sales Representative
	YAV-SUPER-DATA		YAVEON Super Data

Assigned Permission Sets Lines | Manage

Assigned Role ID ↑		Restrict Permissions	Scope ↑
	D365 BASIC	☐	System
	D365 SALES DOC, EDIT	☐	System
	D365 SALES DOC, POST	☐	System



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