

This guide provides a step-by-step approach to efficiently manage recurring sales lines in Business Central. By following the instructions, users can easily create, add, and export recurring sales lines to Excel.

Business Central

Environment:
ECL-BNV-USA-TEST-FR

MZANA PRODUCTS CO., INC.

< Finance Cash Management Sales Purchasing Popdock ForNAV Shopify >

Items Vendors Items Bank Accounts Chart of Accounts Item Tracking Info Status Production BOMs User Time Registers

t from last month

I ALLOWANCE was busy, with 1,000 units booked

Actions

- + Sales Quote + Purchase Quote > Find entries... > Reports
- + Sales Order + Purchase Order > New Excel Reports
- + Sales Invoice + Purchase Invoice > Payments Power BI Reports

ities

This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$5,975	\$5,839,497	\$4,045,224	0
See more	See more	See more	See more

ng Sales

Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
254	4	1	

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
331	7	1

2 Type "recurring sales" and click on the line

The screenshot shows the Dynamics 365 Business Central interface for MANZANA PRODUCTS CO., INC. A search bar at the top right contains the text "recurring sales". A dropdown menu is open, showing "Go to Pages and Tasks" with options for "Recurring Sales Lines" (Administration) and "Create Recurring Sales Invoices" (Tasks). Below this, there is a "Search for 'recurring sales'" section with "Search company data" and "Search Help" options. The background shows various financial metrics and a list of ongoing sales and purchases.

MANZANA PRODUCTS CO., INC.

Customers Vendors Items Bank Accounts

Insight from last month

OI ALLOWANCE with 1,000 units

Activities

Sales This Month: \$55,975

Overdue Sales Invoice Amount: \$5,839,497

Overdue Purch. Invoice Amount: \$4,045,224

Sales Invoices Predicted Overdue: 0

Ongoing Sales

Sales Quotes: 0

Sales Orders: 254

Completely Re... from Stock: 4

Sales Invoices: 1

Ongoing Purchases

Purchase Orders: 331

Ongoing Purch. Invoices: 7

Purch. Invoices... Next Week: 1

3 To review a specific Sales Line - Click on the line.

The screenshot shows the Dynamics 365 Business Central interface for MANZANA PRODUCTS CO., INC. The "Recurring Sales Lines" table is displayed. The table has two columns: "Code" and "Description". The first row is highlighted with a blue selection bar. An orange circle highlights the "Code" column header.

MANZANA PRODUCTS CO., INC.

Customers Vendors Items Bank Accounts

Insight from last month

OI ALLOWANCE with 1,000 units

Activities

Sales This Month: \$55,975

Overdue Sales Invoice Amount: \$5,839,497

Overdue Purch. Invoice Amount: \$4,045,224

Sales Invoices Predicted Overdue: 0

Ongoing Sales

Sales Quotes: 0

Sales Orders: 254

Completely Re... from Stock: 4

Sales Invoices: 1

Ongoing Purchases

Purchase Orders: 331

Ongoing Purch. Invoices: 7

Purch. Invoices... Next Week: 1

Code	Description
AGMARK	AGMARK
BL	BLANKET
BRAGG	BRAGG
BULKM	BULKM
CA	CA CONTAINER \$ SEAL
CA-CRV	CA-CRV
CASEK	CASEK
CASEPK	CASEPK
COD	COD
DRUM-TOTE	DRUM & TOTE
EDEN	EDEN
FILTER	FILTER
GBEE	GBEE
LOAD	LOAD
MATEO	MATEO
PALLETS	PALLETS
PREPAY	PREPAY
REEFER	REEFER
SW	SW

4 Click "Manage"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

MANZANA

Customers

Insight from

OL A with

Activities

Sales This Mo

\$55

> See more

Ongoing Sal

Sales Quote

0

Recurring Sales Lines

✓ Saved

+ New Manage

Code ↑	Description
AGMARK	AGMARK
BL	BLANKET
BRAGG	BRAGG
BULKM	BULKM
→ CA	CA CONTAINER \$ SEAL
CA-CRV	CA-CRV
CASEK	CASEK
CASEPK	CASEPK
COD	COD
DRUM-TOTE	DRUM & TOTE
EDEN	EDEN
FILTER	FILTER
GBEE	GBEE
LOAD	LOAD
MATEO	MATEO
PALLETS	PALLETS
PREPAY	PREPAY
REEFER	REEFER
SW	SW

5 Click "View"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

MANZANA

Customers

Insight from

OL A with

Activities

Sales This Mo

\$55

> See more

Ongoing Sal

Sales Quote

0

Recurring Sales Lines

✓ Saved

+ New Manage

Edit View Delete

Code ↑	Description
AGMARK	AGMARK
BL	BLANKET
BRAGG	BRAGG
BULKM	BULKM
→ CA	CA CONTAINER \$ SEAL
CA-CRV	CA-CRV
CASEK	CASEK
CASEPK	CASEPK
COD	COD
DRUM-TOTE	DRUM & TOTE
EDEN	EDEN
FILTER	FILTER
GBEE	GBEE
LOAD	LOAD
MATEO	MATEO
PALLETS	PALLETS
PREPAY	PREPAY
REEFER	REEFER
SW	SW

6

On this page you can review the text that belongs to this Sales Line - if you want to edit - Click here.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

Standard Sales Lines Card

CA · CA CONTAINER \$ SEAL

General

Code CA Currency Code
 Description CA CONTAINER \$ SEAL

Lines | **Manage** | **Line**

New Line Delete Line

Type	No.	Description	Quantity	Prod line Code	Department Code	Manfbr Code	Project Code
→ Comment	:	CONTAINER #:					
Comment		SEAL #:					

7

To add a new comment - Click "(Blank)"Click "Comment"

General

Code CA Currency Code
 Description CA CONTAINER \$ SEAL

Lines | **Manage** | **Line**

New Line Delete Line

Type	No.	Description	Quantity	Prod line Code	Department Code	Manfbr Code	Project Code
Comment		CONTAINER #:					
Comment		SEAL #:					
→ Item							

Option Values
 Comment
 G/L Account
 → Item
 Resource
 Fixed Asset
 Show details Select from full list

8



9



10 Click here.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

MANZANA Products Co., Inc. | < Finance Cash Management Sales Purchasing Popdock ForNAV Shopify

Customers Vendors Items Bank Accounts Chart of Accounts Item Tracking Info Status Production BOMs User Time Registers

Insight from last month

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Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
0	254	4	1

Ongoing Purchases

Purchase Orders	Ongoing Purch... Invoices	Purch. Invoices... Next Week
331	7	1

Recurring Sales Lines

Code Description

AGMARK	AGMARK
BL	BLANKET
BRAGG	BRAGG
BULKM	BULKM
CA	CA CONTAINER \$ SEAL
CA-CRV	CA-CRV
CASEK	CASEK
CASEPK	CASEPK
COD	COD
DRUM-TOTE	DRUM & TOTE
EDEN	EDEN
FILTER	FILTER
GBEE	GBEE
LOAD	LOAD
MATEO	MATEO
PALLETS	PALLETS
PREPAY	PREPAY
REEFER	REEFER
SW	SW

11 Next, how to locate the Sales Lines on a Customer: Click "Customers"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

MANZANA PRODUCTS CO., INC. | < Finance Cash Management Sales Purchasing Popdock ForNAV Shopify

Customers Vendors Items Bank Accounts Chart of Accounts Item Tracking Info Status Production BOMs User Time Registers

Insight from last month

OI ALLOWANCE was busy, with 1,000 units booked

Actions

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice
- > Find entries...
- > New
- > Payments
- > Reports
- Excel Reports
- Power BI Reports

Activities

Sales This Month: \$55,975

Overdue Sales Invoice Amount: \$5,839,497

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Sales Invoices Predicted Overdue: 0

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
0	254	4	1

Ongoing Purchases

Purchase Orders	Ongoing Purch... Invoices	Purch. Invoices... Next Week
331	7	1

12 Choose a Customer - In this example Click "C00032"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

MANZANA PRODUCTS CO., INC.

Customers: All

No. ↑	Name	Customer Hierarchy Code	Customer Price Group	Payment Terms Code	Location Code	Phone No.	Contact	VS Gr
C00001	MANZANA DONATIONS ONLY	C00001	MAN PU	COD	GREEN			
C00011	MANZANA DONATIONS ONLY - EMPLOYEE D...	C00011	MAN PU	COD	GREEN			
C00012	MANZANA DONATIONS ONLY - MANZANA ...	C00012	MAN PU	COD	GREEN			
C00021	MANZANA SAMPLES - SUPPLY CHAIN	C00021	MAN DEL	COD	GREEN			
C00026	3 TREASURE FOODS	C00026	VINEGAR	NET 30	GREEN			
C00032	ALBERTSONS	C00032	SAFEWAY	30D(10D)2	SUTTON	503-251-9200		
C00035	ALBERTSONS - AUBURN	C00035	SAFEWAY	30D(10D)2	SUTTON			
C00036	ALBERTSONS - BREA	C00036	SAFEWAY	30D(10D)2	SUTTON			
C00038	ALBERTSONS - ROANOKE	C00038	SAFEWAY	30D(10D)2	SUTTON			
C00039	ALBERTSONS - DENVER	C00039	SAFEWAY	30D(10D)2	SUTTON			
C00046	ALBERTSONS - MELROSE PARK - LIEBS	C00046	SAFEWAY	30D(10D)2	LIEBCP			
C00047	ALBERTSONS - METHUEN	C00047	SAFEWAY	30D(10D)2	SUTTON			
C00049	ALBERTSONS - PORTLAND	C00049	SAFEWAY	30D(10D)2	SUTTON			
C00050	ALBERTSONS - SALT LAKE CITY	C00050	SAFEWAY	30D(10D)2	SUTTON			
C00054	ALBERTSONS - TOLLESON	C00054	SAFEWAY	30D(10D)2	SUTTON			
C00055	ALBERTSONS - TRACY	C00055	SAFEWAY	30D(10D)2	SUTTON			
C00057	AMY'S KITCHEN INC	C00057	VINEGAR	NFT 30	GREEN	707-568-4790		

13 In the header, Click "Related"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

Customer Card

C00032 · ALBERTSONS

Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Yaveon 365 Price Info Contact Apply Template Merge With... Send

Yaveon 365 Customer Hierarchy Structure

Show less

Summary Preview

Copilot uses AI to gather valuable insights from data you already have access to.

See terms | Learn more

Start summarizing

Details Attachments (0)

Documents

Name File Ex

(There is nothing to show in this view)

Customer Card Fields:

- Customer Code: C00032
- Customer Name: ALBERTSONS
- Customer Code (dropdown):
- Price (\$): 77,730.00
- Price (\$) As Vendor: 0.00
- Price Due (\$): 73,746.00
- Limit (\$): 500,000.00
- Blocked: ☐
- Any Group Code: (dropdown)
- Customer Hierarchy Code: C00032
- Only listed Items: ☒
- Responsibility Center: (dropdown)
- Chain Name: (dropdown)
- Service Zone Code: (dropdown)
- Document Sending: (dropdown)
- Total Sales - Fiscal Year: 77,730.00
- Costs (\$): 0.00
- Profit (\$): 77,730.00
- Profit %: 100.0
- Last Date Modified: 10/13/2025
- Pop-up Notes: No
- Disable Search by Name: ☐
- CD Customer Layout Group: (dropdown)

14 Click "Sales"

The screenshot shows the Microsoft Dynamics 365 Business Central interface. The top navigation bar includes 'Home', 'Request Approval', 'New Document', 'Prices & Discounts', 'Customer', 'Report', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. The 'Related' menu is open, showing options like 'Customer', 'History', 'Prices & Discounts', 'Yaveon 365 Trade', 'Sales' (highlighted with an orange circle), 'Documents', 'Service', 'Delivery Rating', and 'EDI'. The main area displays the 'General' tab of the Customer Card for 'C00032 - ALBERTSONS'. The card includes fields for 'No.', 'Name', 'IC Partner Code', 'Balance (\$)', 'Balance (\$ As Vendor)', 'Balance Due (\$)', 'Credit Limit (\$)', 'Blocked', 'Privacy Blocked', 'Company Group Code', 'Customer Hierarchy Code', and 'Sell only listed Items'. A 'Summary' panel on the right shows a 'Start summarizing' button. The 'Documents' panel at the bottom indicates '(There is nothing to show in this view)'.

15 Click "Recurring Sales Lines..."

The screenshot shows the Microsoft Dynamics 365 Business Central interface. The top navigation bar includes 'Request Approval', 'New Document', 'Prices & Discounts', 'Customer', 'Report', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. The 'Related' menu is open, showing options like 'Customer', 'History', 'Prices & Discounts', 'Yaveon 365 Trade', 'Sales' (highlighted with an orange circle), 'Documents', 'Service', 'Delivery Rating', and 'EDI'. The 'Sales' option is further expanded, showing 'Prepayment Percentages', 'Recurring Sales Lines...' (highlighted with an orange circle), 'Sales Tolerances', and 'Sales Approval Setup'. The main area displays the 'General' tab of the Customer Card for 'C00032 - ALBERTSONS'. The card includes fields for 'No.', 'Name', 'IC Partner Code', 'Balance (\$)', 'Balance (\$ As Vendor)', 'Balance Due (\$)', 'Credit Limit (\$)', 'Blocked', 'Privacy Blocked', 'Company Group Code', 'Customer Hierarchy Code', and 'Sell only listed Items'. A 'Summary' panel on the right shows a 'Start summarizing' button. The 'Documents' panel at the bottom indicates '(There is nothing to show in this view)'.

16

This dropdown shows which Recurring Sales Lines are assigned to this customer. It also shows that the Sales lines will need to be manually entered on the Sales orders for this customer. This can be changed by choosing a different option in the dropdown.

Business Central

Environment: ECL-ENV-USA-TEST-FR

ALBERTSONS

✓ Saved

Sales Lines

+ New Edit List Delete Card More options

	Description	Valid From Date	Valid To date	Payment Method Code	Payment Terms Code	Direct Debit Mandate ID	Bloc...	Insert Rec. Lines On Quotes	Insert Rec. Lines On Orders	Insert Rec. Lines On Invoices	Insert Rec. Lines On Cr. Memos
BLANKET							☐	Manual	Manual	Manual	Manual
COD							☐	Manual	Manual	Manual	Manual
PAY	PREPAY						☐	Manual	Manual	Manual	Manual
FER	REEFER						☐	Manual	Manual	Manual	Manual
SW							☐	Manual	Manual	Manual	Manual

17

Click here to exit the view.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

C00032 - ALBERTSONS

✓ Saved

Recurring Sales Lines

+ New Edit List Delete Card More options

Code ↑	Description	Valid From Date	Valid To date	Payment Method Code	Payment Terms Code	Direct Debit Mandate ID	Bloc...	Insert Rec. Lines On Quotes	Insert Rec. Lines On Orders	Insert Rec. Lines On Invoices	Insert Rec. Lines On Cr. Memos
→ BL	BLANKET						☐	Manual	Manual	Manual	Manual
COD	COD						☐	Manual	Manual	Manual	Manual
PREPAY	PREPAY						☐	Manual	Manual	Manual	Manual
REEFER	REEFER						☐	Manual	Manual	Manual	Manual
SW	SW						☐	Manual	Manual	Manual	Manual

18

Next, how to locate the Sales Lines on a Sales order "Click "Sales"

amics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

MANZANA PRODUCTS CO., INC. | < Finance > Cash Management > **Sales** > Purchasing > Popdock > ForNAV > Shopify > | ≡ SO PA

Customers: All > | < > 🔍 📄 + New 🗑 Delete Home > New Document > Customer > Prices & Discounts > Report > ... | 📄 🔍 ≡ ⓘ ↶ 📌

No. ↑	Name	Customer Hierarchy Code	Customer Price Group	Payment Terms Code	Location Code	Phone No.	Contact	VS Custor Group Co
C00001	MANZANA DONATIONS ONLY	C00001	MAN PU	COD	GREEN			
C00011	MANZANA DONATIONS ONLY - EMPLOYEE D...	C00011	MAN PU	COD	GREEN			
C00012	MANZANA DONATIONS ONLY - MANZANA ...	C00012	MAN PU	COD	GREEN			
C00021	MANZANA SAMPLES - SUPPLY CHAIN	C00021	MAN DEL	COD	GREEN			
C00026	3 TREASURE FOODS	C00026	VINEGAR	NET 30	GREEN			
C00032	ALBERTSONS	C00032	SAFEWAY	30D(10D)2	SUTTON	503-251-9200		
C00035	ALBERTSONS - AUBURN	C00035	SAFEWAY	30D(10D)2	SUTTON			
C00036	ALBERTSONS - BREA	C00036	SAFEWAY	30D(10D)2	SUTTON			
C00038	ALBERTSONS - ROANOKE	C00038	SAFEWAY	30D(10D)2	SUTTON			
C00039	ALBERTSONS - DENVER	C00039	SAFEWAY	30D(10D)2	SUTTON			
C00046	ALBERTSONS - MELROSE PARK - LIEBS	C00046	SAFEWAY	30D(10D)2	LIEBCP			
C00047	ALBERTSONS - METHUEN	C00047	SAFEWAY	30D(10D)2	SUTTON			
C00049	ALBERTSONS - PORTLAND	C00049	SAFEWAY	30D(10D)2	SUTTON			
C00050	ALBERTSONS - SALT LAKE CITY	C00050	SAFEWAY	30D(10D)2	SUTTON			
C00054	ALBERTSONS - TOLLESON	C00054	SAFEWAY	30D(10D)2	SUTTON			
C00055	ALBERTSONS - TRACY	C00055	SAFEWAY	30D(10D)2	SUTTON			
C00057	ALBION KITCHEN INC	C00057	VINEGAR	NET 30	GREEN	703-558-4700		

19

Click "Sales Orders"

MANZANA PRODUCTS CO., INC. | < Finance > Cash Management > **Sales** > Purchasing > Popdock > ForNAV > Shopify > | ≡

Customers	Sales Quotes	Sales Invoices	Reminders	Posted Sales Credit Memos	Issued Reminders
Items	Sales Orders	Sales Credit Memos	Finance Charge Memos	Posted Sales Return Receipts	Issued Finance Charge Memos
Item Charges	Blanket Sales Orders	Sales Return Orders	Posted Sales Invoices	Posted Sales Shipments	

C00001	MANZANA DONATIONS ONLY	C00001	MAN PU	COD	GREEN
C00011	MANZANA DONATIONS ONLY - EMPLOYEE D...	C00011	MAN PU	COD	GREEN
C00012	MANZANA DONATIONS ONLY - MANZANA ...	C00012	MAN PU	COD	GREEN
C00021	MANZANA SAMPLES - SUPPLY CHAIN	C00021	MAN DEL	COD	GREEN
C00026	3 TREASURE FOODS	C00026	VINEGAR	NET 30	GREEN
C00032	ALBERTSONS	C00032	SAFEWAY	30D(10D)2	SUTTON 503-251-9200
C00035	ALBERTSONS - AUBURN	C00035	SAFEWAY	30D(10D)2	SUTTON
C00036	ALBERTSONS - BREA	C00036	SAFEWAY	30D(10D)2	SUTTON
C00038	ALBERTSONS - ROANOKE	C00038	SAFEWAY	30D(10D)2	SUTTON
C00039	ALBERTSONS - DENVER	C00039	SAFEWAY	30D(10D)2	SUTTON
C00046	ALBERTSONS - MELROSE PARK - LIEBS	C00046	SAFEWAY	30D(10D)2	LIEBCP
C00047	ALBERTSONS - METHUEN	C00047	SAFEWAY	30D(10D)2	SUTTON
C00049	ALBERTSONS - PORTLAND	C00049	SAFEWAY	30D(10D)2	SUTTON
C00050	ALBERTSONS - SALT LAKE CITY	C00050	SAFEWAY	30D(10D)2	SUTTON
C00054	ALBERTSONS - TOLLESON	C00054	SAFEWAY	30D(10D)2	SUTTON
C00055	ALBERTSONS - TRACY	C00055	SAFEWAY	30D(10D)2	SUTTON

20 In this example Click "SO1048470"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

MANZANA PRODUCTS CO., INC. | Finance | Cash Management | Sales | Purchasing | Popdock | ForNAV | Shopify

Sales Orders: All | + New | Delete | Home | Release | Post... | Print/Send | Order | EDI | ...

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Document Date	Status	Compl... Shipped	Amount Shipped Not Invoiced (\$)	Amount Shipped Not Invoiced (\$) Incl. Tax
SO1047992	C00497	COSTCO.WHOLESALE - SUMNER		GREEN		6/23/2025	Open	No	0.00	0.00
SO1048470	C00036	ALBERTSONS - BREA		SUTTON		7/31/2025	Open	No	0.00	0.00
SO1048508	C00320	PAUL KOLLING - SEBASTOPOL		GREEN		8/4/2025	Released	No	0.00	0.00
SO1048546	C00776	THRIVE MARKET - HANOVER		SUTTON		8/5/2025	Open	No	0.00	0.00
SO1048547	C00396	THRIVE MARKET - BATESVILLE		CABCP		8/5/2025	Open	No	0.00	0.00
SO1048548	C00397	THRIVE MARKET - MCCARREN		SUTTON		8/5/2025	Released	No	0.00	0.00
SO1048669	C00758	HEALTH-ADE LLC		GREEN		8/14/2025	Open	No	0.00	0.00
SO1048718	C00315	OTIS McALLISTER - MEXICO		GREEN		8/19/2025	Open	No	0.00	0.00
SO1048907	C00758	HEALTH-ADE LLC		GREEN		8/28/2025	Open	No	0.00	0.00
SO1048950	C00049	ALBERTSONS - PORTLAND		SUTTON		9/4/2025	Released	No	0.00	0.00
SO1048951	C00049	ALBERTSONS - PORTLAND		SUTTON		9/4/2025	Open	No	0.00	0.00
SO1049162	C00982	LIL ENTERPRISES, INC. DBA HAP...		GREEN		9/18/2025	Open	No	0.00	0.00
SO1049236	C00924	ALL IN ONE MASTER TONIC		GREEN		9/24/2025	Open	No	0.00	0.00
SO1049241	C01032	PHOEBE CORP		GREEN		9/24/2025	Open	No	0.00	0.00
		CO WHOLESALE JAPAN - IC...		GREEN		9/26/2025	Open	No	0.00	0.00
		CO WHOLESALE JAPAN - M...		GREEN		9/26/2025	Open	No	0.00	0.00
		CO TAKAHASHI BRANCH		GREEN		9/26/2025	Open	No	0.00	0.00

About sales orders X

Use a sales order when you partially ship or invoice an order, and when you use drop shipments or

21 Click "Prepare"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

Sales Order

SO1048470 · ALBERTSONS - BREA

Home Prepare Print/Send Request Approval Order Report EDI Actions Related Reports Automate Fewer options

Customer Notes Release Create Inventory Put-away/Pick... Yaveon 365 Header Texts

Post... Create Warehouse Shipment Archive Document Yaveon 365 Footer Texts

Requested Delivery Date 11/3/2025 Freight Type SPFWY- CA

Promised Delivery Date 11/3/2025 Freight Zone CAL

External Document No. *

Summary Preview

Copilot uses AI to gather valuable insights from you already have access to.

See terms | Learn more

Start summarizing

Details Attachments (0)

Documents

Name File

(There is nothing to show in this view)

Lines Manage Print with BarTender Line Order

New Line Delete Line Select items...

Item Tracking Assigned	Type	No.	Catch Wei... Item	Blan... Order exists	Item Reference No.	Description	Location Code	Fr... the sal... Lo
→	Item	103286			16663	OORGANICS M.O.B CDR 8/64OZ...	GREEN	
	Charge (Item)	CRV ALLOW...				CRV ALLOWANCE SALES	GREEN	
	Comment							
	Comment							
	Comment							
	Comment					CONTAINER#		

22 Click "Get Recurring Sales Lines..."

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

Sales Order

SO1048470 · ALBERTSONS - BREA

Home Prepare Print/Send Request Approval Order Report EDI Actions Related Reports Automate Fewer options

Copy Document... **Get Recurring Sales Lines...** Incoming Document Calculate Invoice Discount Move Negative Lines...

Requested Delivery Date 11/3/2025 Freight Type SPWY- CA
Promised Delivery Date 11/3/2025 Freight Zone CAL
External Document No. *

Lines Manage Print with BarTender Line Order

New Line Delete Line Select items...

Item Tracking Assigned	Type	No.	Catch We... Item	Blan... Order exists	Item Reference No.	Description	Location Code
→	Item	103286			16663	OORGANICS M.O.B CDR 8/64OZ...	GREEN
	Charge (Item)	CRV ALLOW...				CRV ALLOWANCE SALES	GREEN
	Comment						
	Comment						
	Comment					CONTAINER#	
	Comment					SEAL#	

Summary Preview

Copilot uses AI to gather valuable insights from data you already have access to.

See terms | Learn more

Start summarizing

Details Attachments (0)

Documents

Name File Extension

(There is nothing to show in this view)

23 Click on the Sales Line you want to add to the Sales order.

Prepare Print/Send Request Approval Order Report EDI Actions Related Reports Automate Fewer options

Copy Document... Get Recurring Sales Lines... Incoming Document Calculate Invoice Discount Move Negative Lines...

Requested Delivery Date 11/3/2025 Freight Type SPWY- CA
Promised Delivery Date 11/3/2025 Freight Zone CAL
External Document No. *

Lines Manage Print with BarTender Line Order

New Line Delete Line Select items...

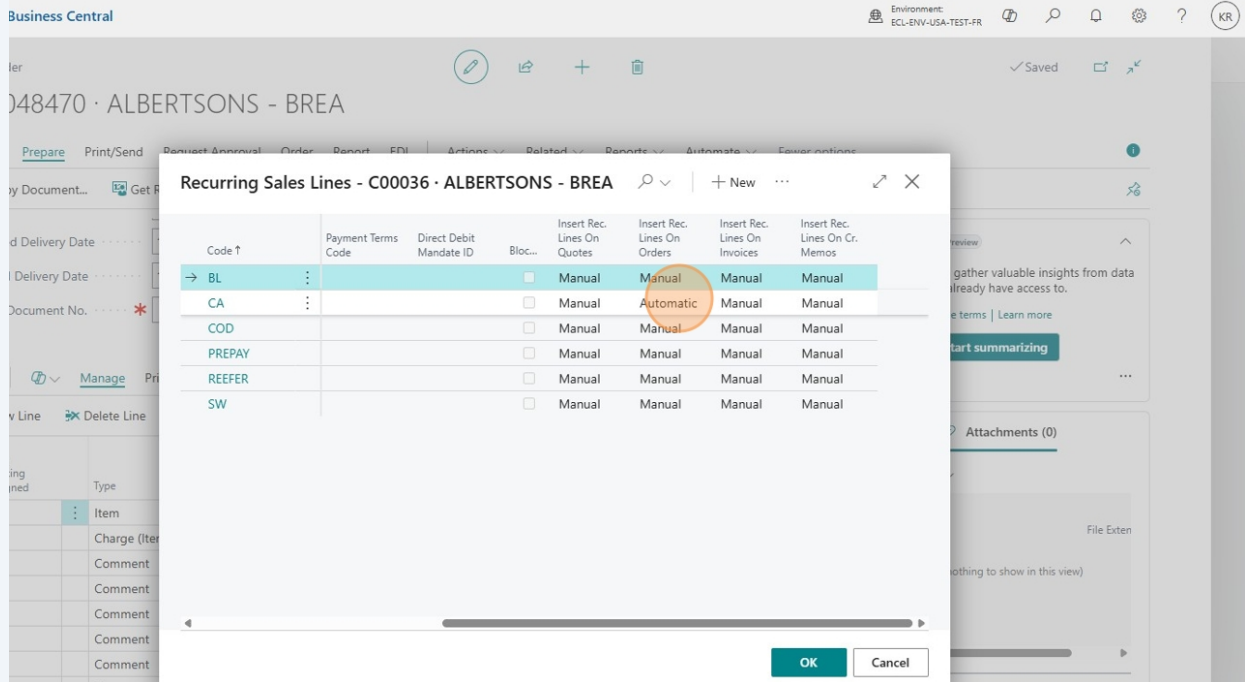
Recurring Sales Lines - C00036 · ALBERTSONS - BREA

Code	Description	Valid From Date	Valid To date	Payment Method Code	Payment Terms Code	Direct Debit Mandate ID
→ BL	BLANKET					
CA	CA					
COD	COD					
PREPAY	PREPAY					
REEFER	REEFER					
SW	SW					

OK Cancel

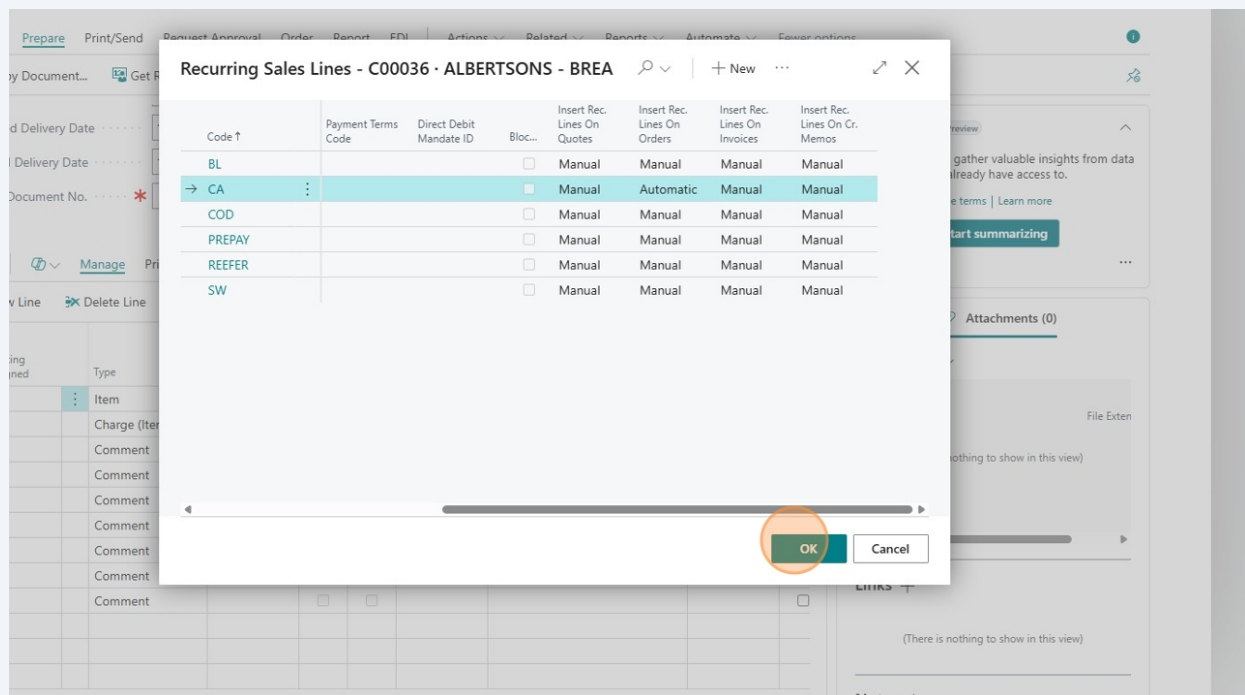
24

To review or change how BC is adding the Sales Lines for this Customer, look at the columns and change if necessary by clicking the drop down and choose a different option.



25

Click "OK"



26 Click here.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

Sales Order

SO1048470 · ALBERTSONS - BREA

Home Prepare Print/Send Request Approval Order Report EDI Actions Related Reports Automate Fewer options

Copy Document... Get Recurring Sales Lines... Incoming Document Calculate Invoice Discount Move Negative Lines...

Retrieve Surcharges/Disco... Actual Total Pallets 0.00

Document Date 7/31/2025 Total Weight Override

Posting Date 7/31/2025 Actual Total Weight 0.00

Order Date 10/27/2025 Appt. Time 2:00:00 PM

Due Date 8/30/2025 Delivered Pricing

Requested Delivery Date 11/3/2025 Freight Type SPWY- CA

Promised Delivery Date 11/3/2025 Freight Zone CAL

External Document No. *

Summary Preview

Copilot uses AI to gather valuable insights from you already have access to.

See terms | Learn more

Start summarizing

Details Attachments (0)

Documents

Name File

(There is nothing to show in this view)

Lines Manage Print with BarTender Line Order

New Line Delete Line Select items...

Item Tracking Assigned	Type	No.	Catch Wei... Item	Blan... Order exists	Item Reference No.	Description	Location Code	Frt th... sar... Lor
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27 Switch to tab Config. Package Card - KR-RECURR-SALESLINES"

28

Adding this section to help identify the table to maintain all customers and their recurring sales lines - Table 172, export the package.

Apply Package Validate Package Import from Excel Export to Excel Get Tables... Actions Automate Fewer options

General

Code KR-RECURR-SALESLINES Language ID

Package Name KR-Recurr-SalesLines Processing Order

Product Version Exclude Config. Tables

Tables Manage Table Functions Excel

New Line Delete Line

Table ID ↑	Table Name	Parent Table ID	Data Template	Dim... as Col...	Skip Table Trig...	Delete Table Records Before Processing	No. of Package Records	No. of Fields Available	No. of Fields Included	No. of Fields to Validate	No. of Packa Err
172	Standard Customer Sales Code	0		☐	☐	☐	0	14	14	14	

29

Last step of this tutorial since it's the free software I am not allowed to switch to excel to show the file but it works like any other config package or Rapidstart in NAV

Dynamics 365 Business Central Environment: ECL-ENV-USA-TEST-FR

Config. Package Card KR-RECURR-SALESLINES

Apply Package Validate Package Import from Excel Export to Excel Get Tables... Actions Automate Fewer options

General

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172	Standard Customer Sales Code	0		☐	☐	☐	0	14	14	14	