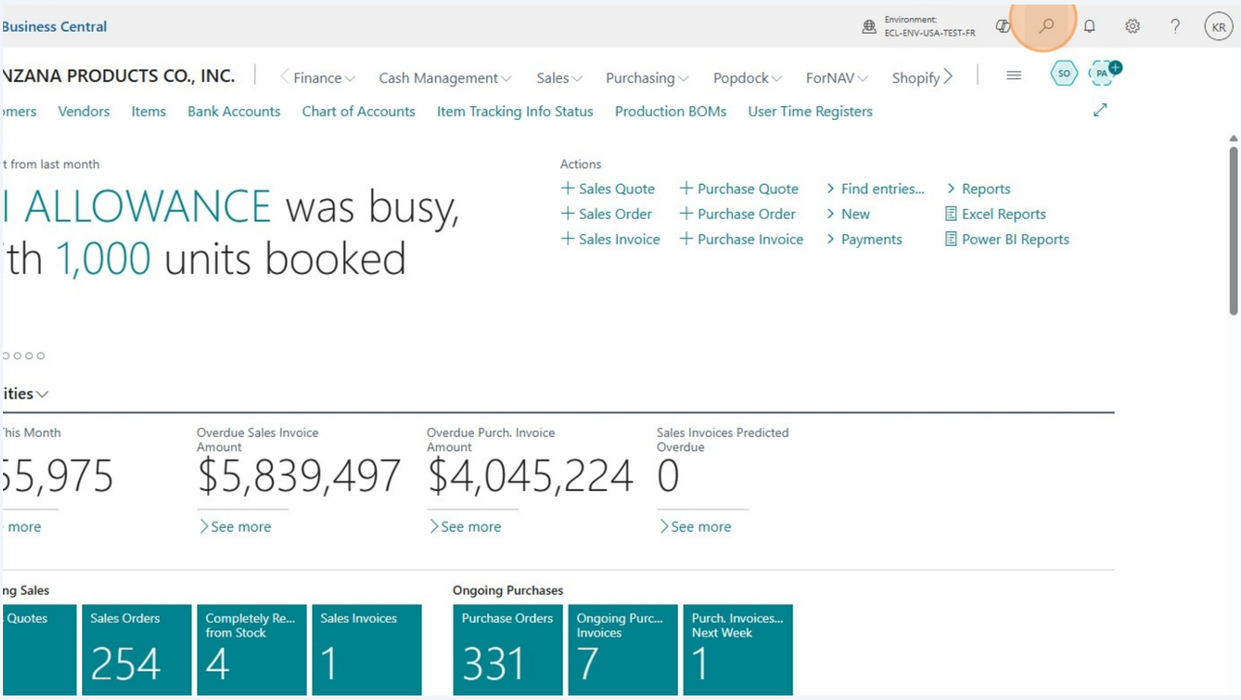
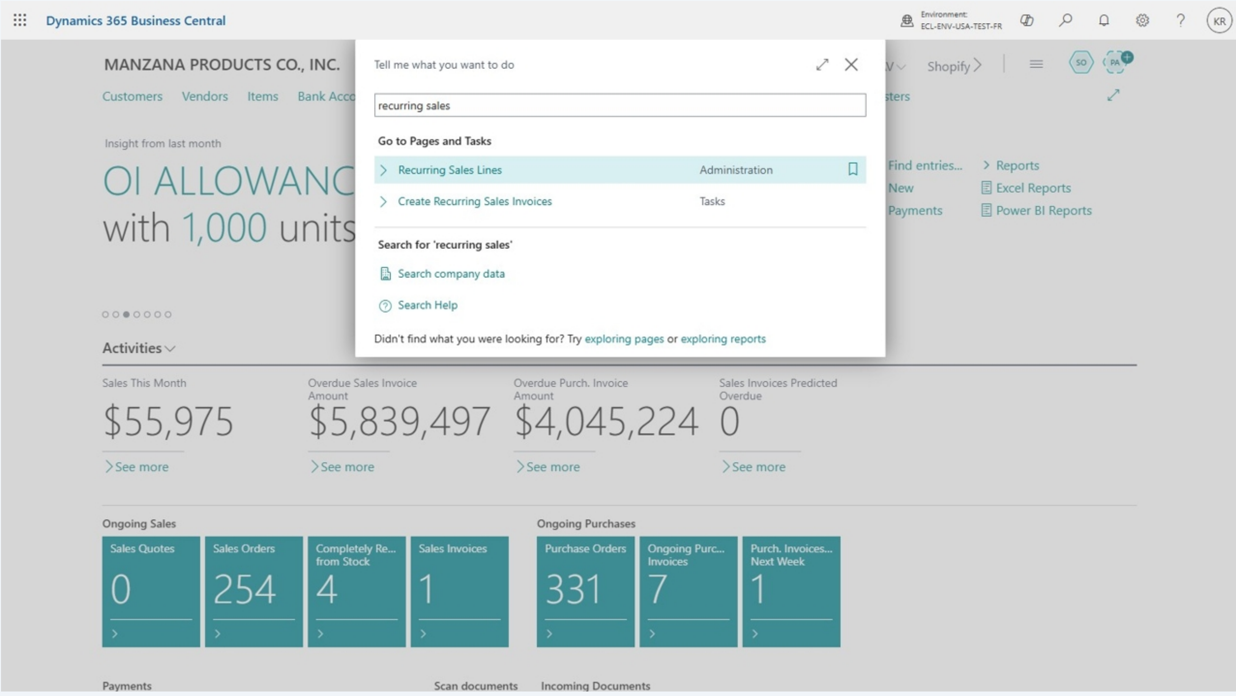
Recurring Sales Lines: How to create, add to Customer, add to Sales orders and export all to Excel

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.

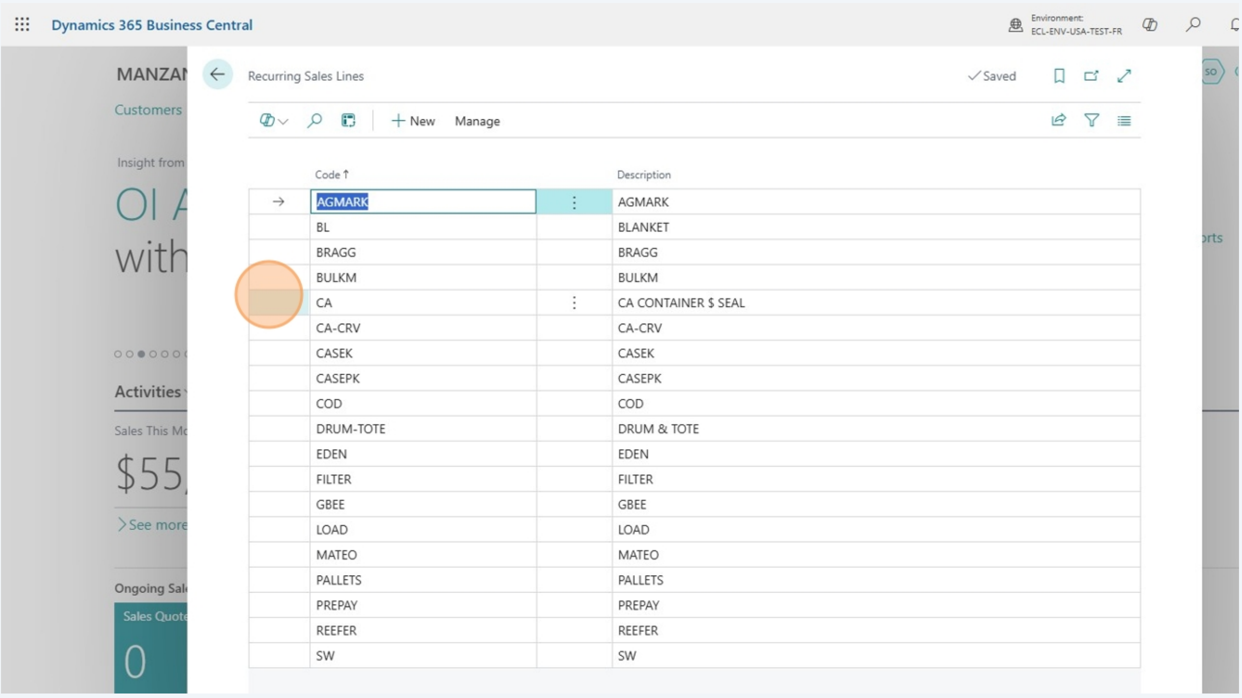
1 To review all recurring Sales Lines - Click the search button.



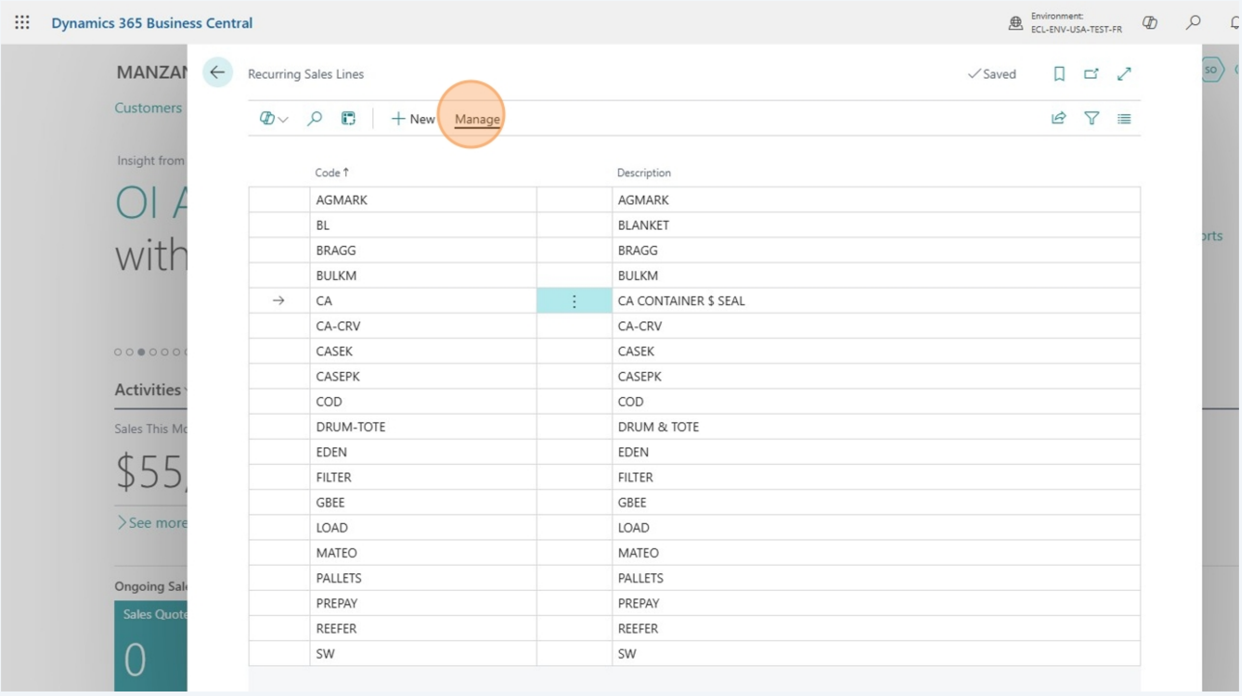
2 Type "recurring sales" and click on the line



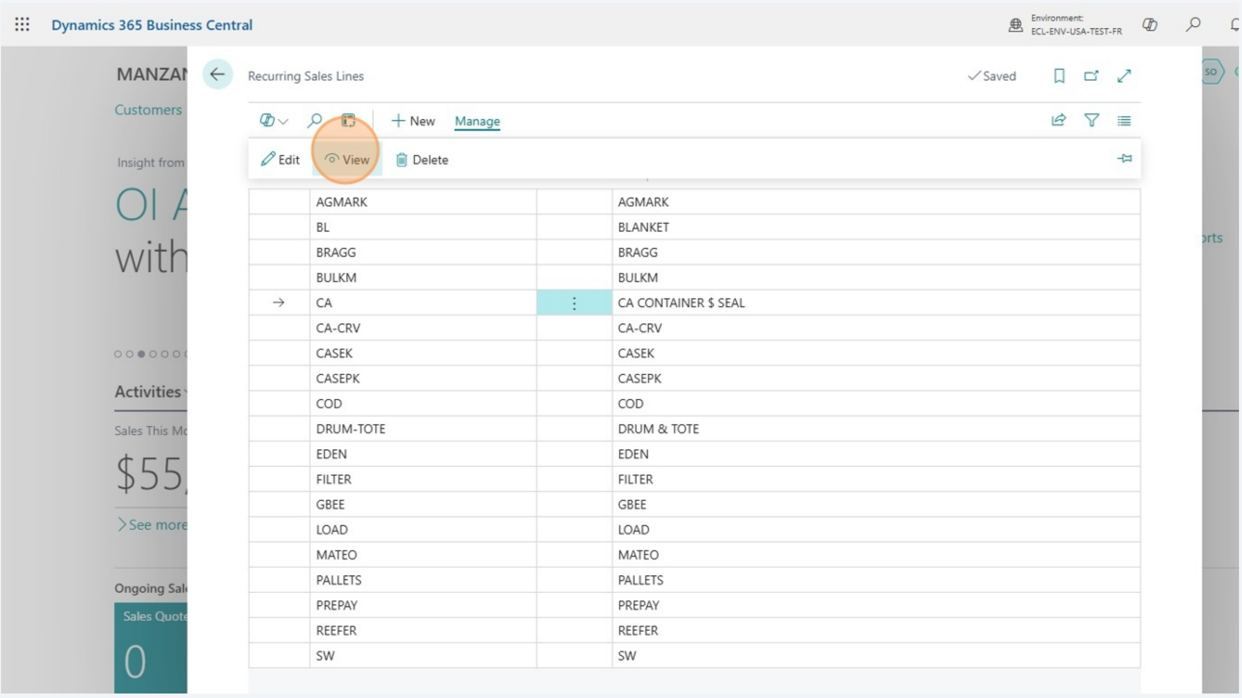
3 To review a specific Sales Line - Click on the line.



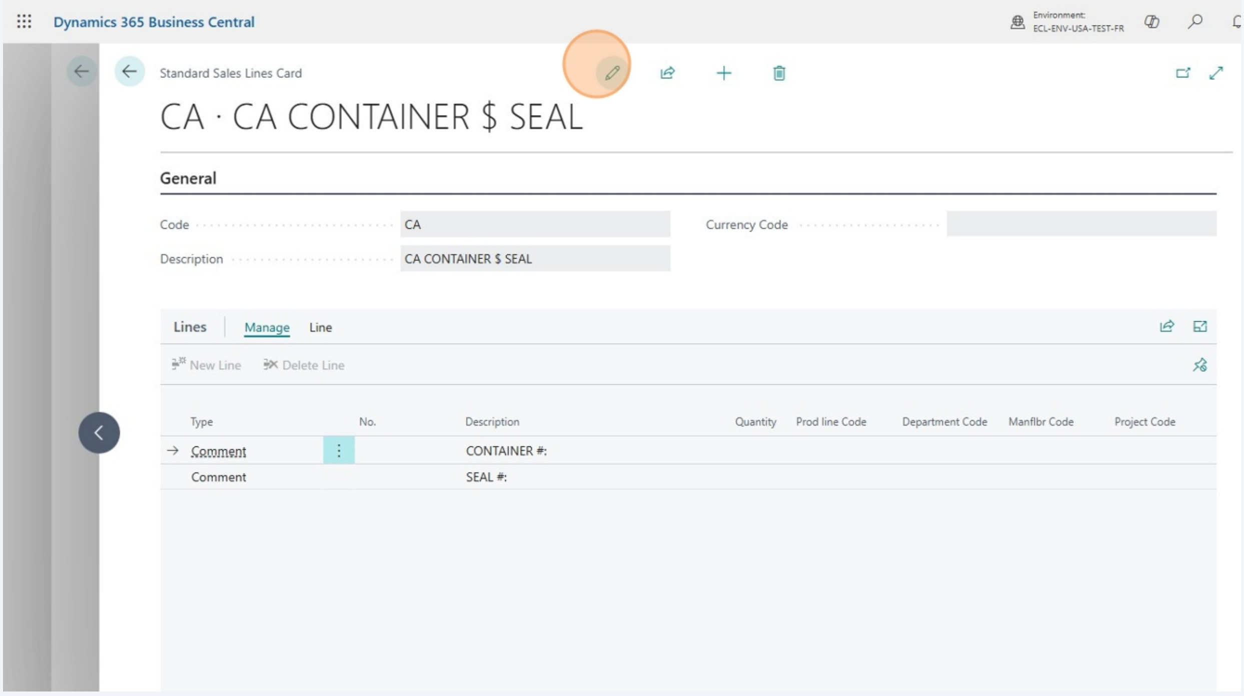
4 Click "Manage"



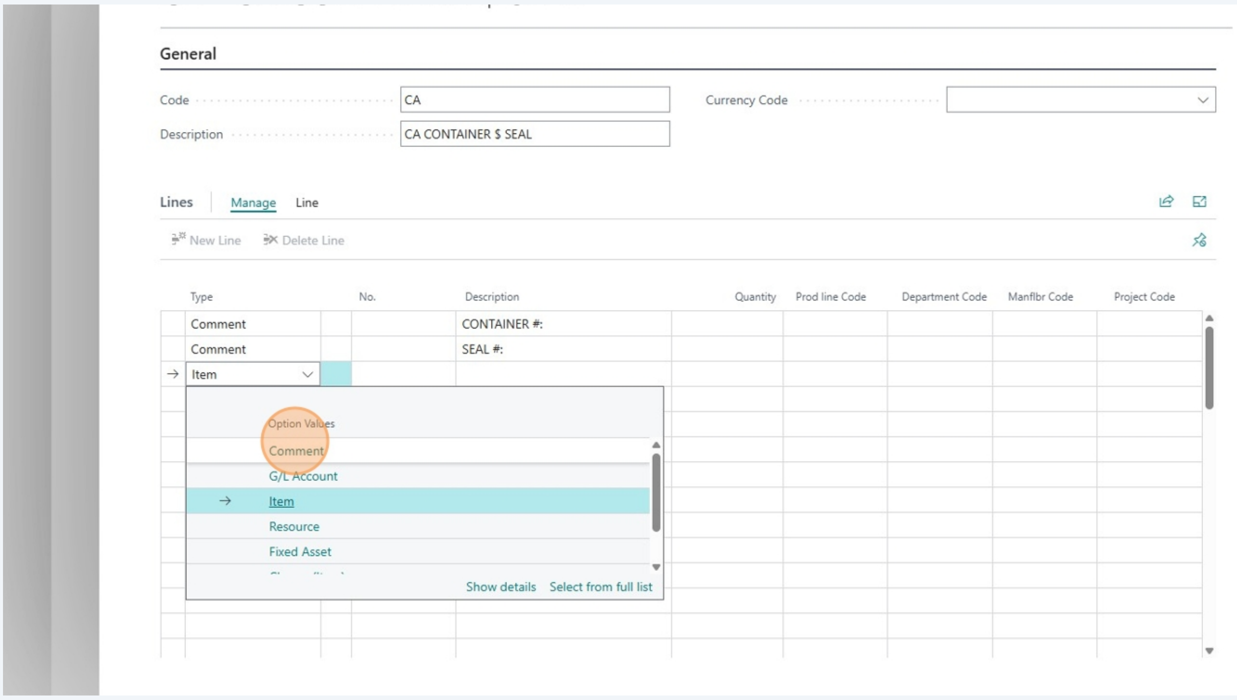
5 Click "View"



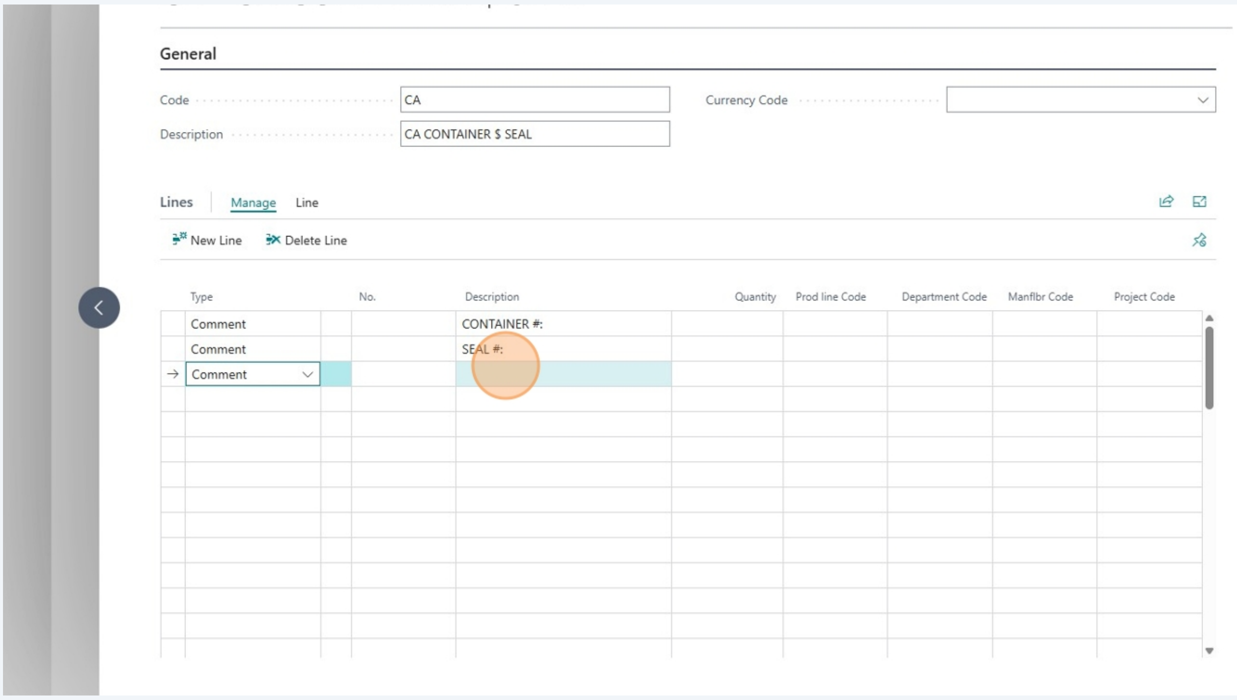
6 On this page you can review the text that belongs to this Sales Line - if you want to edit - Click here.



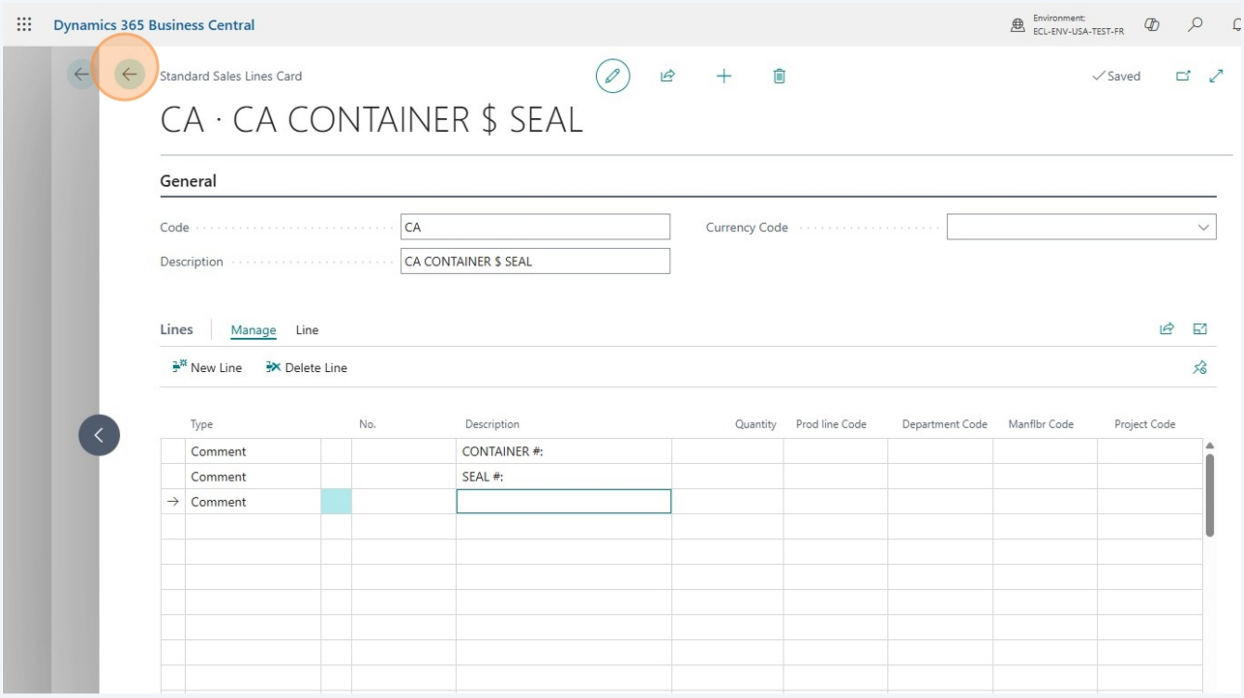
7 To add a new comment - Click "(Blank)"Click "Comment"



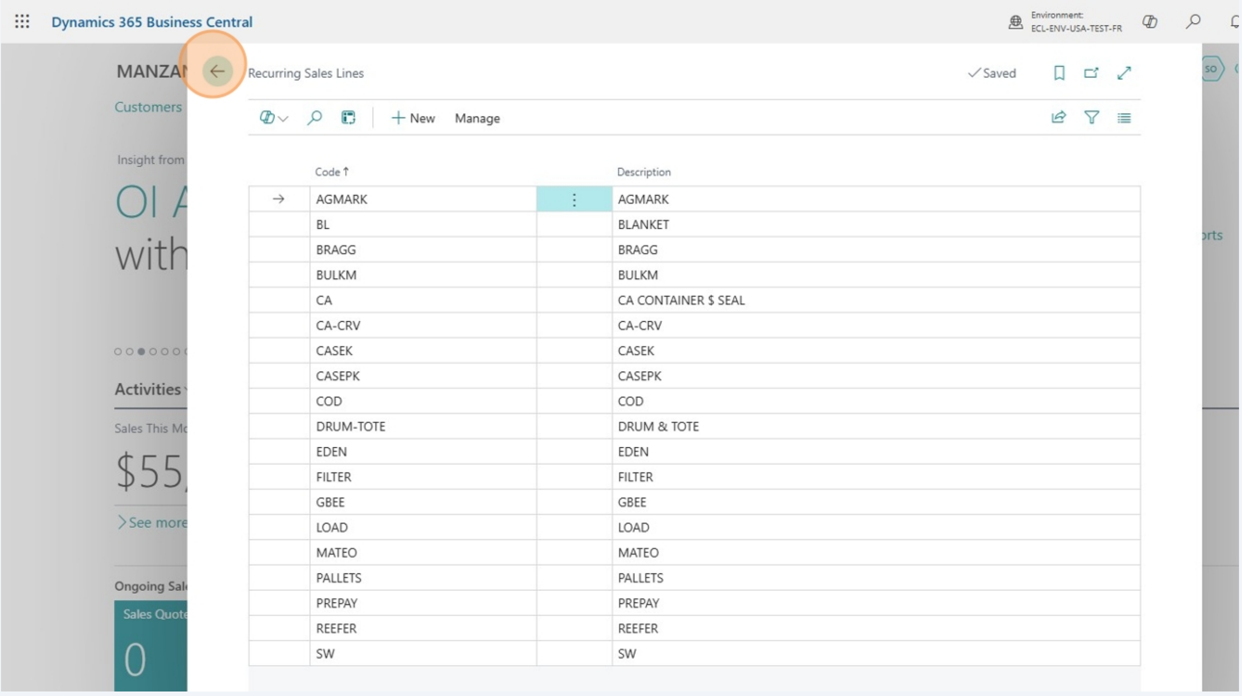
8 Click this text field.



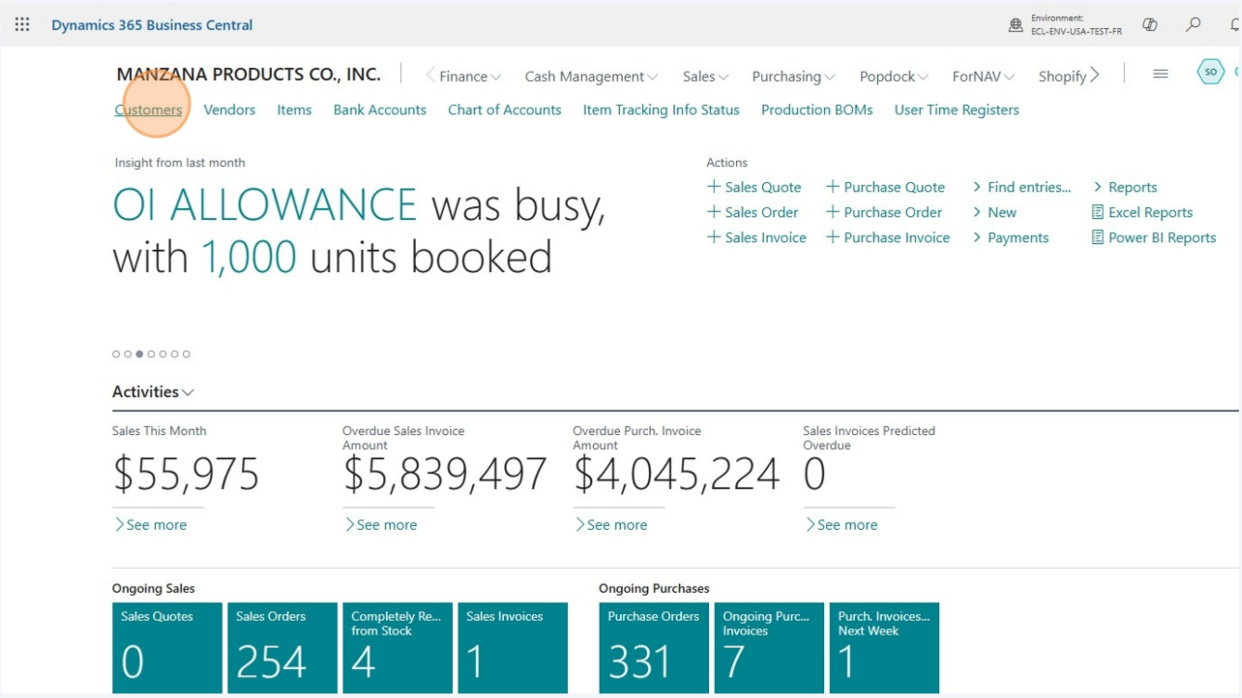
9 Once changes are complete, make sure changes are saved, then - Click here.



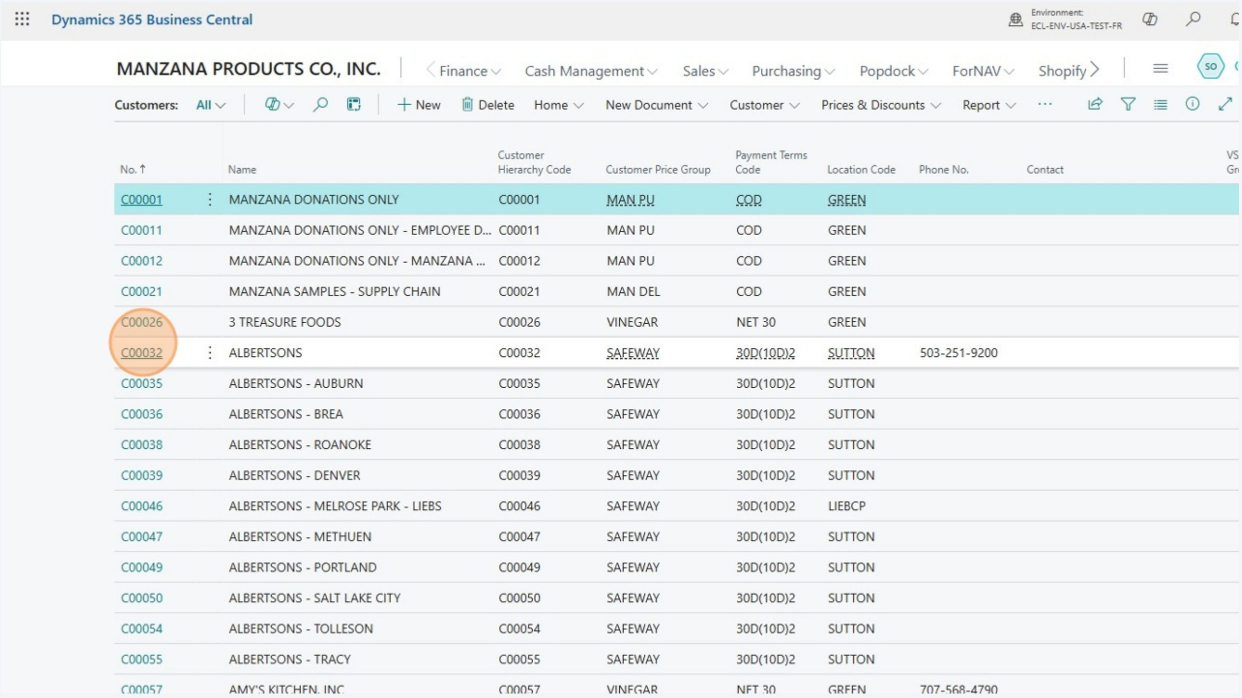
10 Click here.



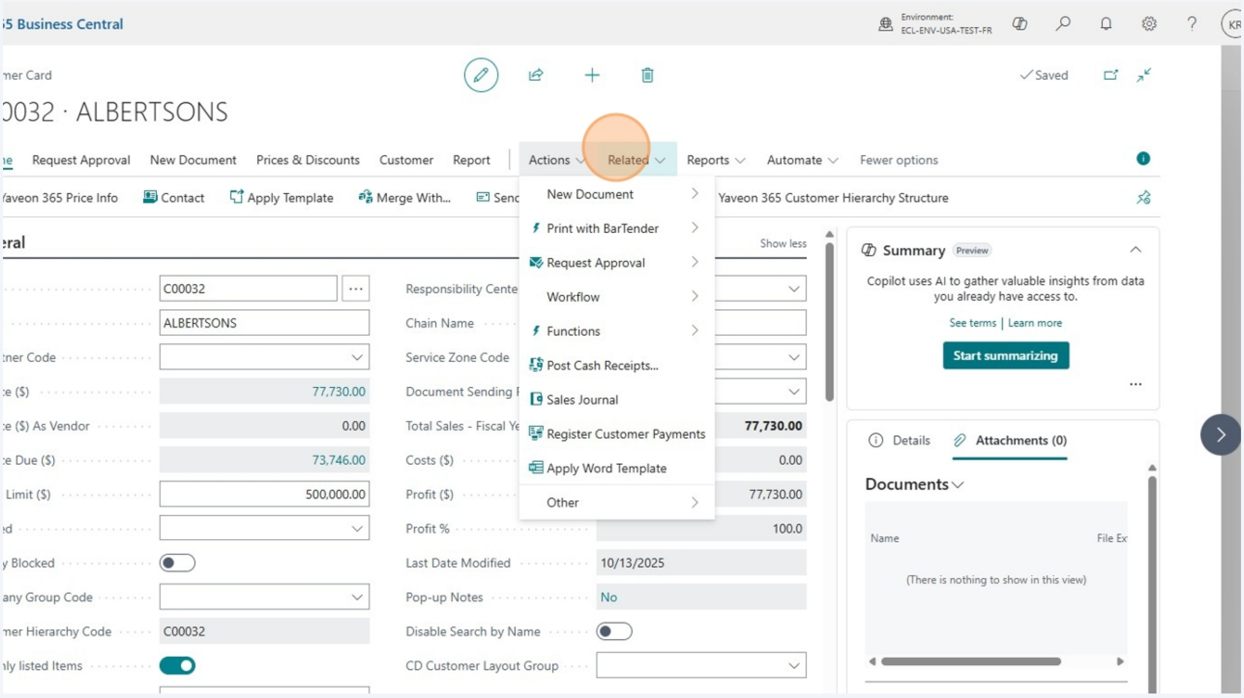
11 Next, how to locate the Sales Lines on a Customer: Click "Customers"



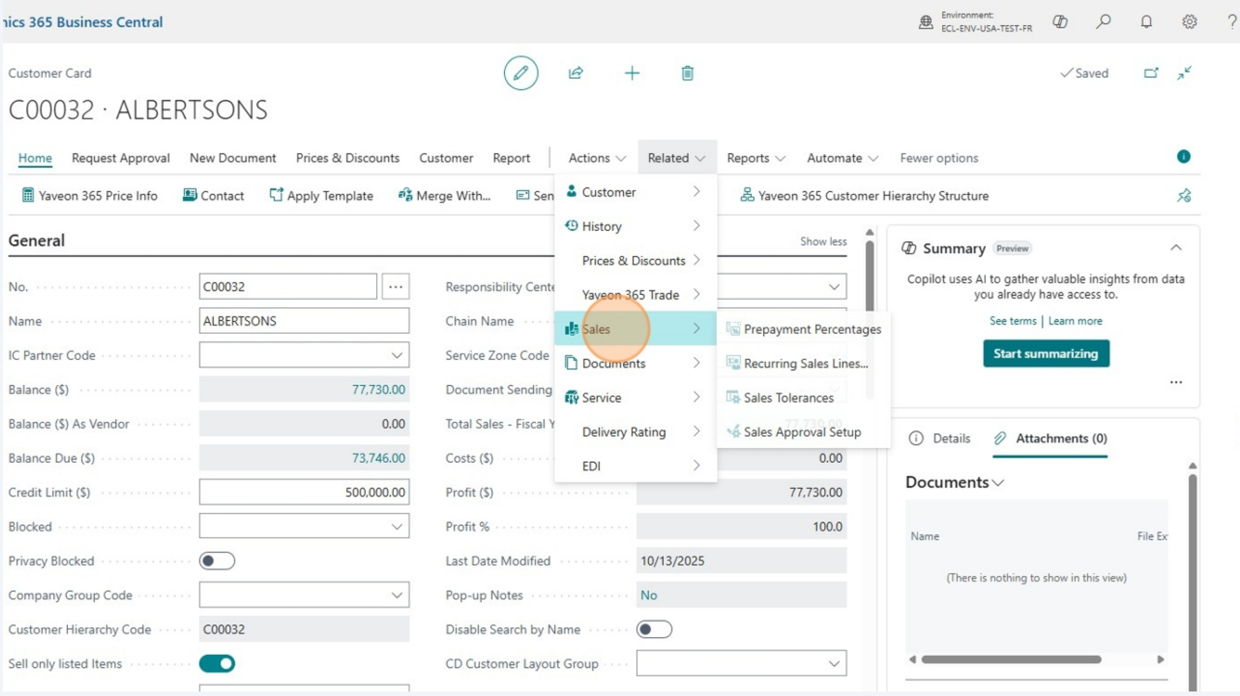
12 Choose a Customer - In this example Click "C00032"



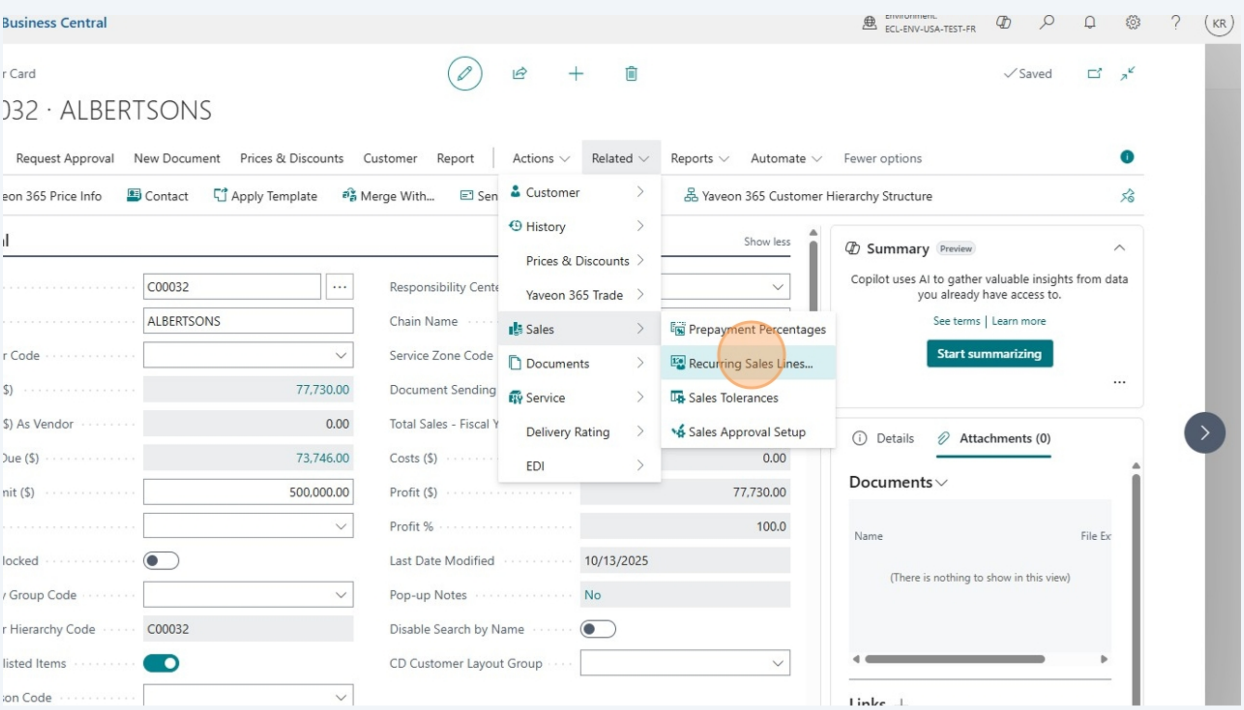
13 In the header, Click "Related"



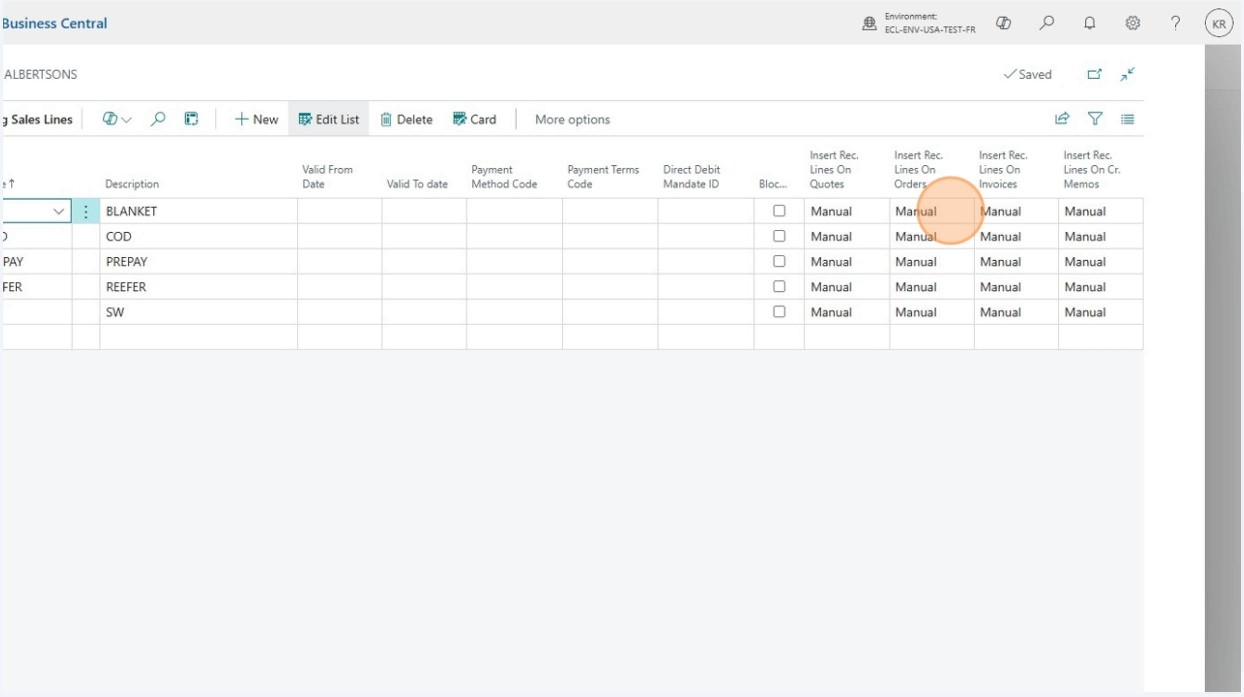
14 Click "Sales"



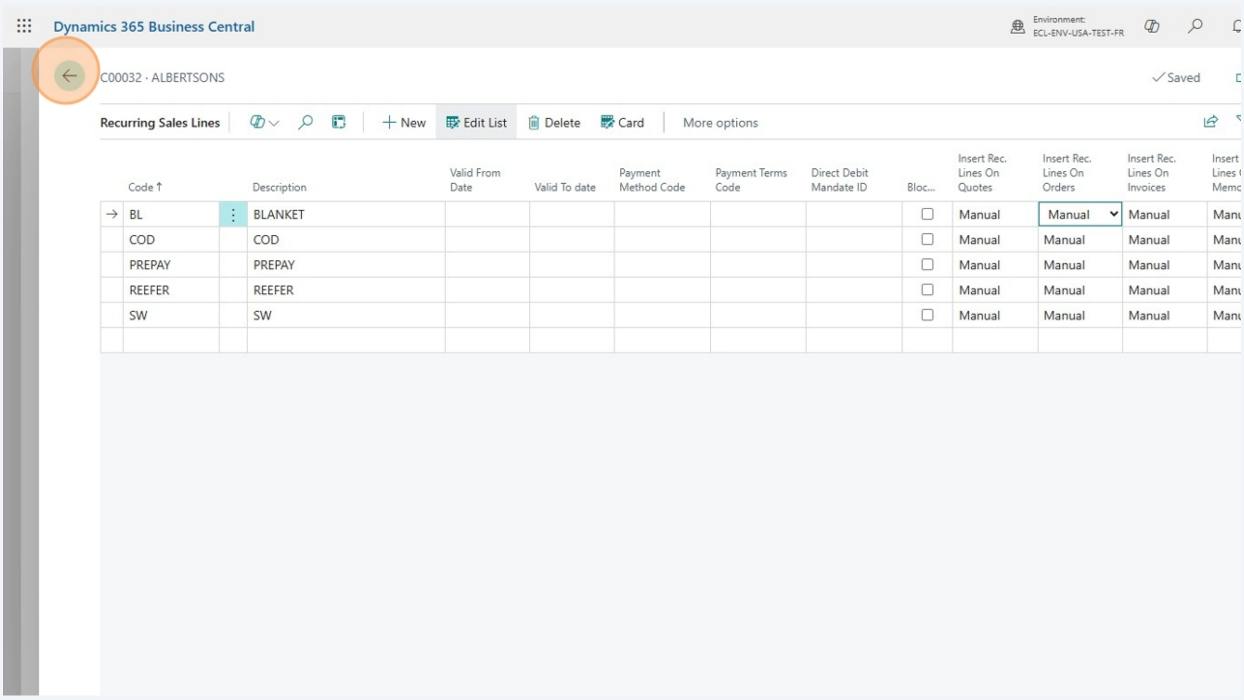
15 Click "Recurring Sales Lines..."



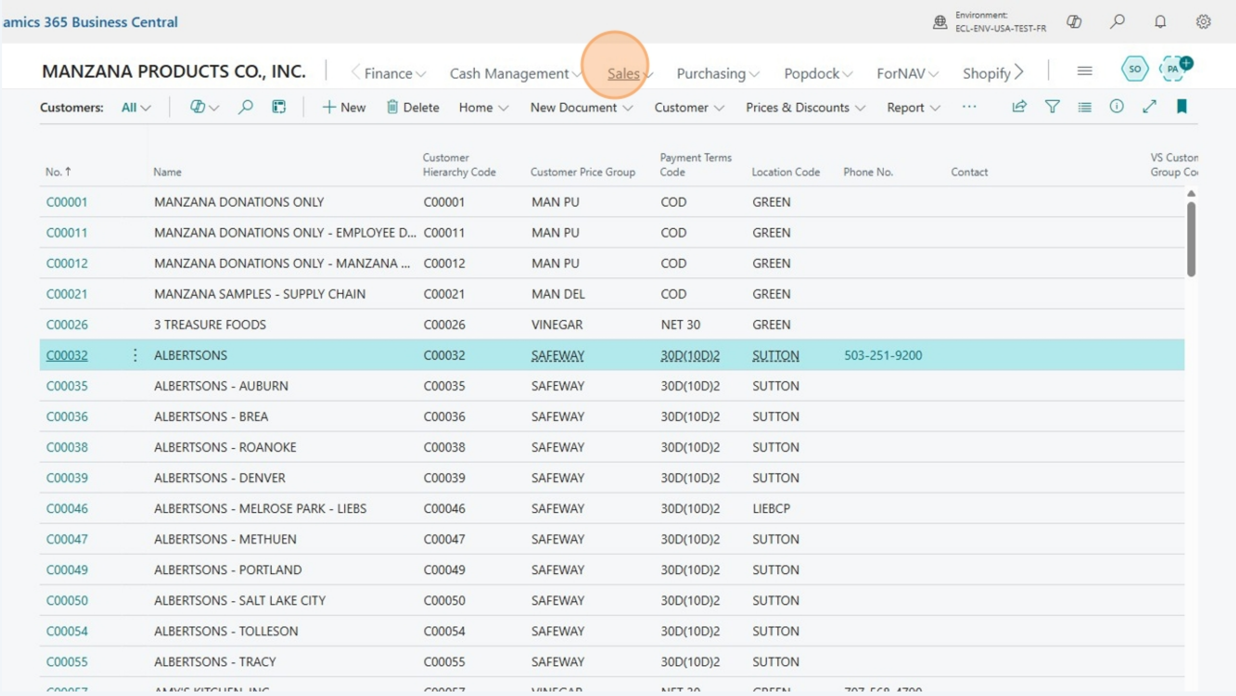
16 This dropdown shows which Recurring Sales Lines are assigned to this customer. It also shows that the Sales lines will need to be manually entered on the Sales orders for this customer. This can be changed by choosing a different option in the dropdown.



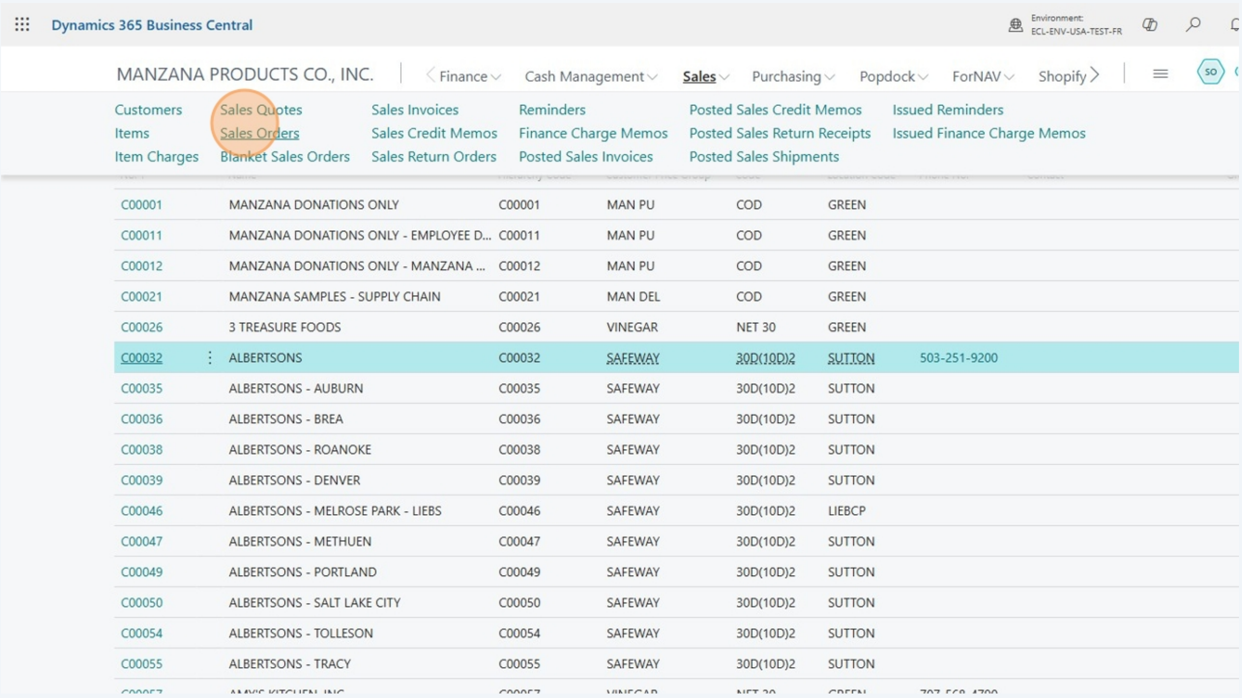
17 Click here to exit the view.



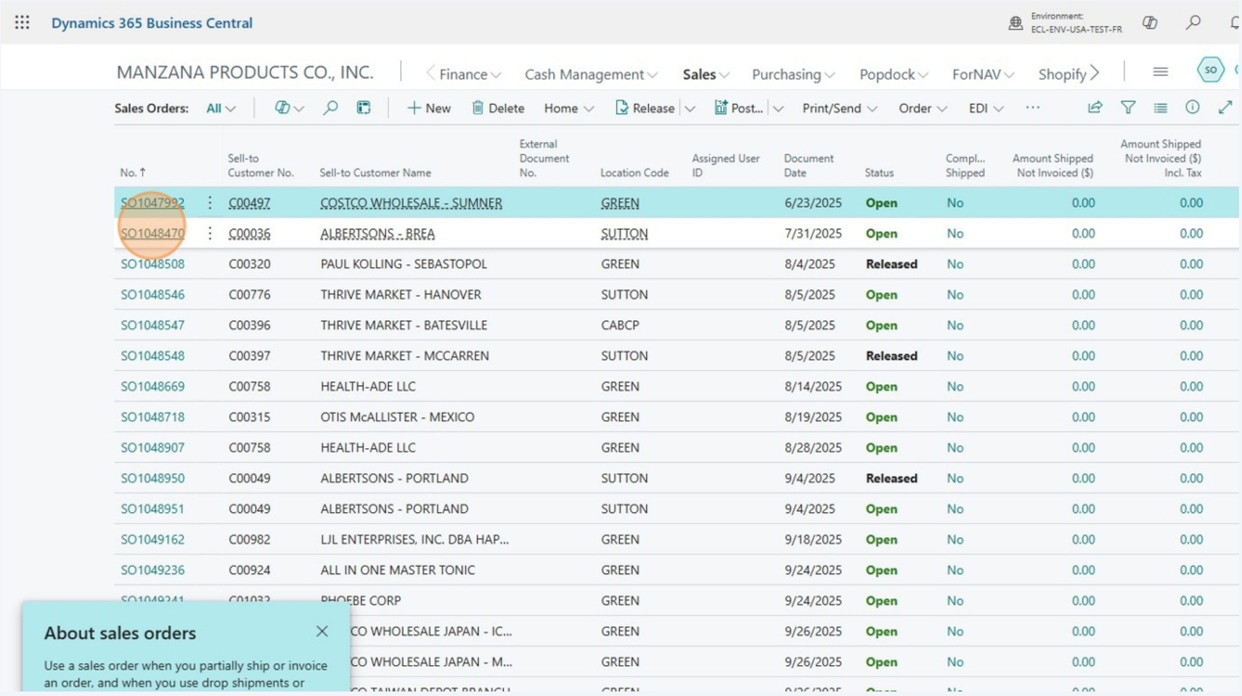
18 Next, how to locate the Sales Lines on a Sales order "Click "Sales"



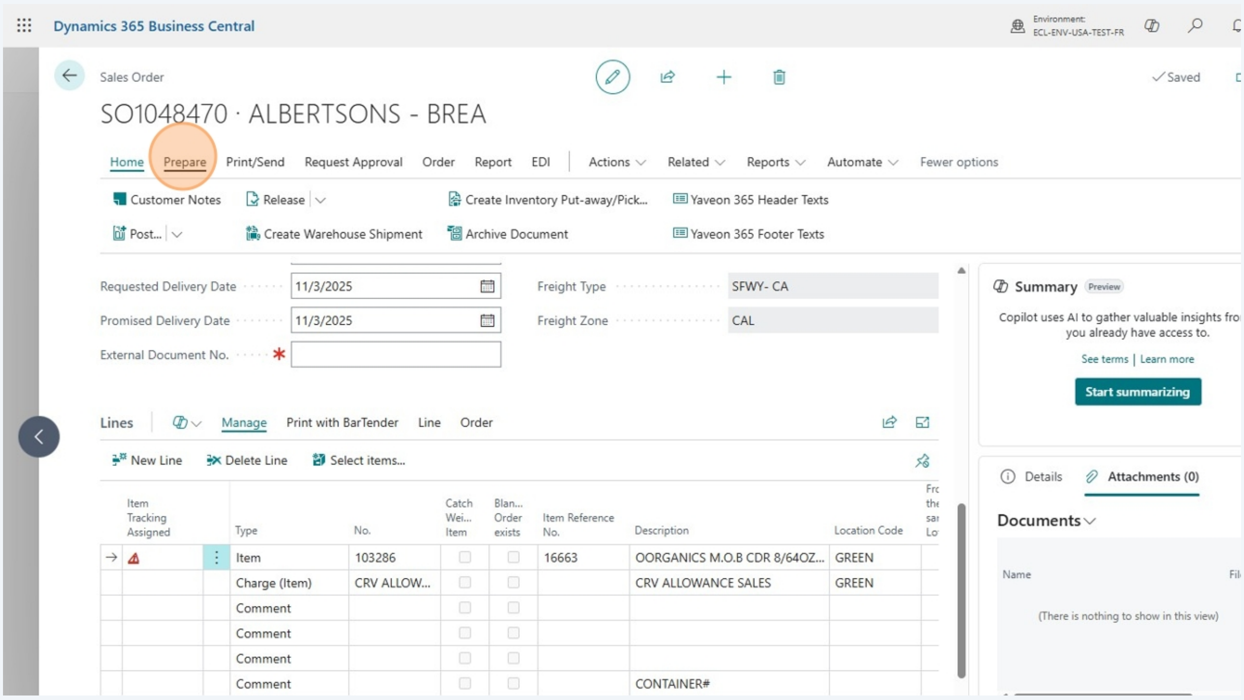
19 Click "Sales Orders"



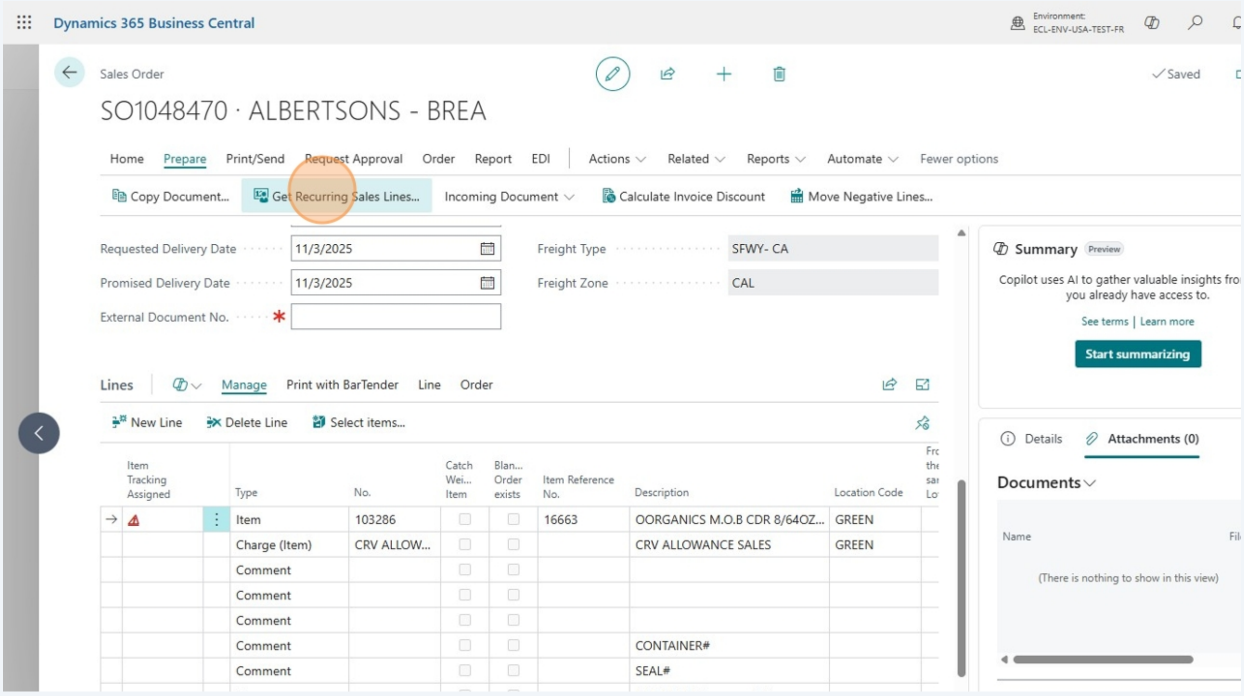
20 In this example Click "SO1048470"



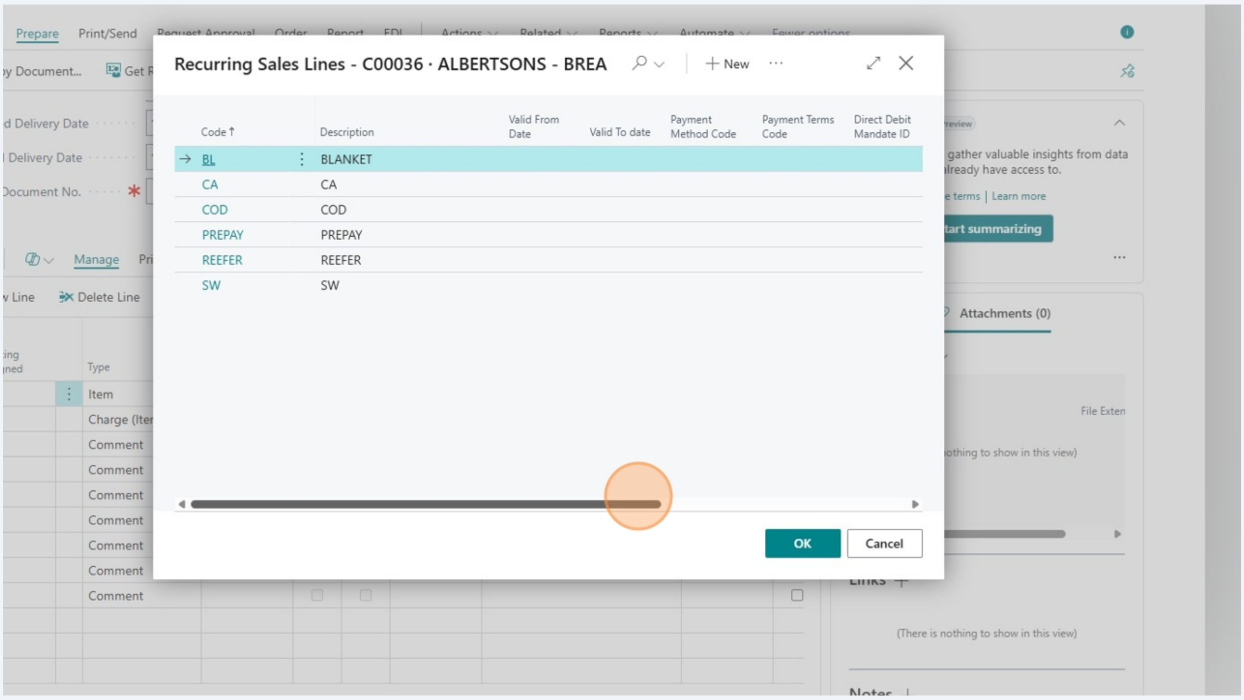
21 Click "Prepare"



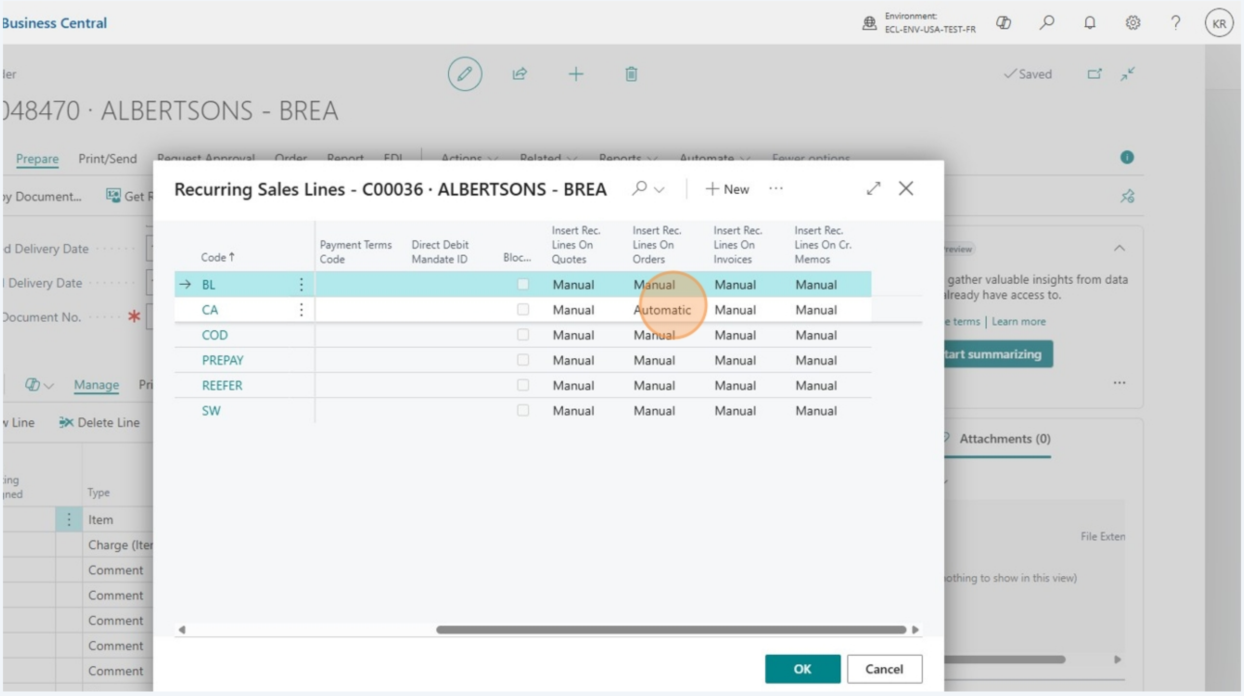
22 Click "Get Recurring Sales Lines..."



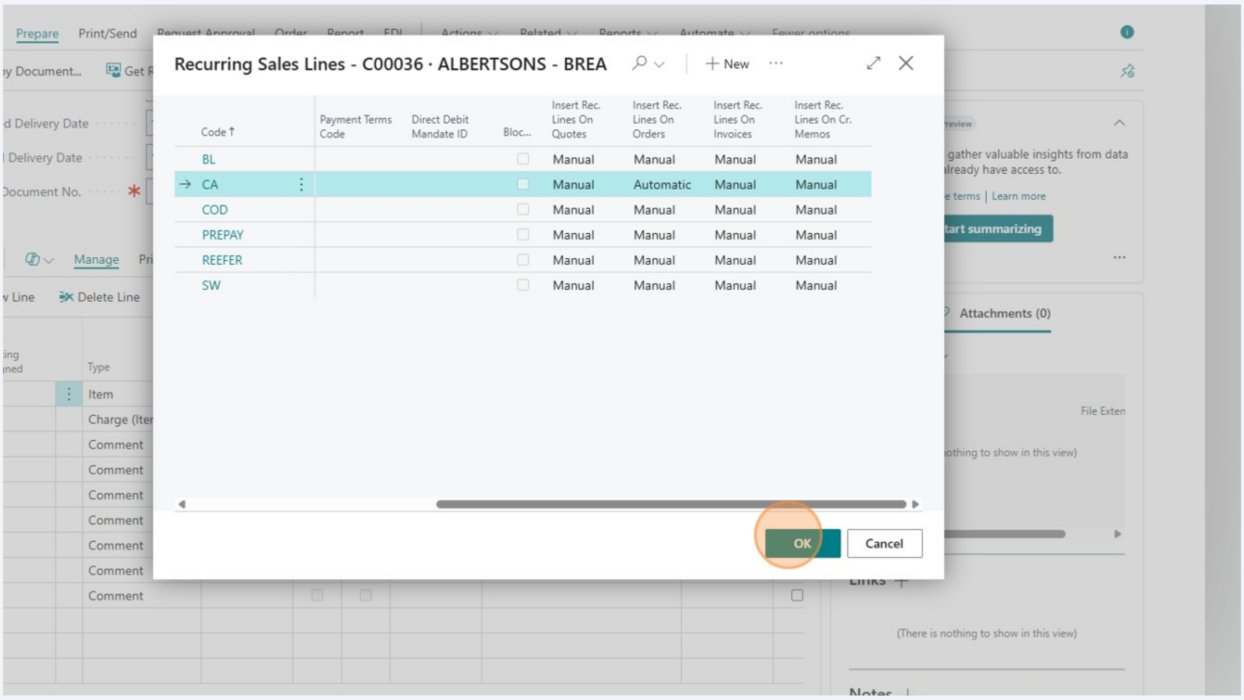
23 Click on the Sales Line you want to add to the Sales order.



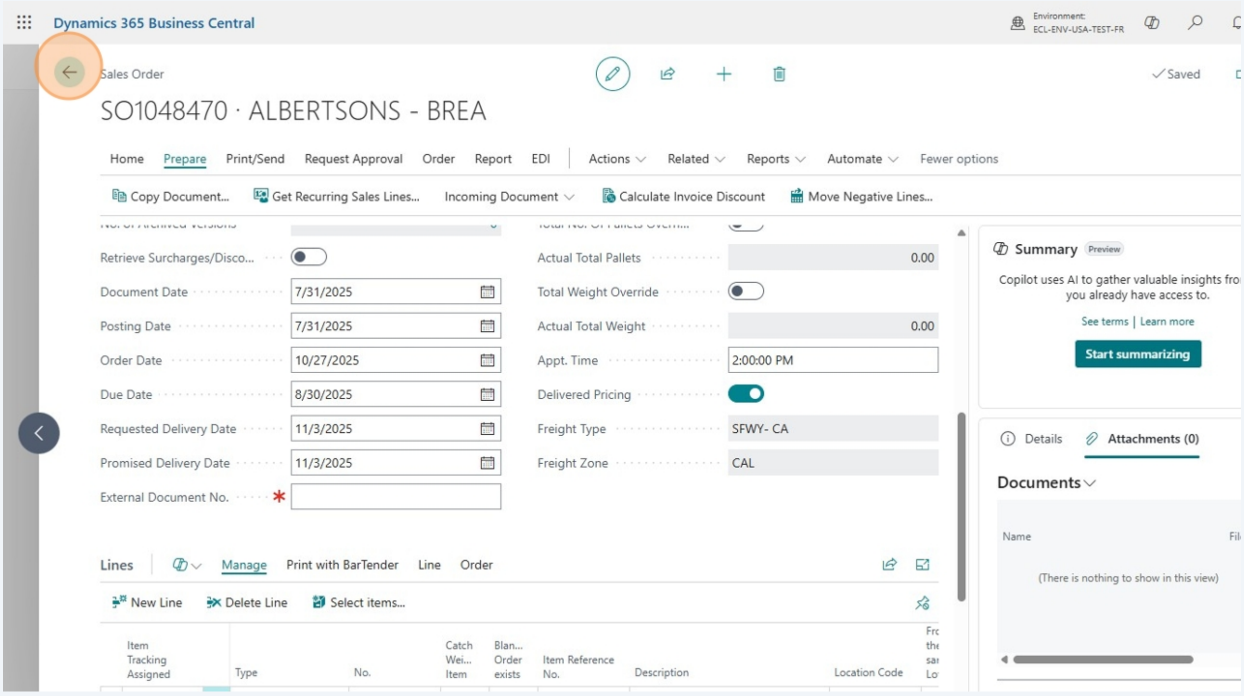
24 To review or change how BC is adding the Sales Lines for this Customer, look at the columns and change if necessary by clicking the drop down and choose a different option.



25 Click "OK"

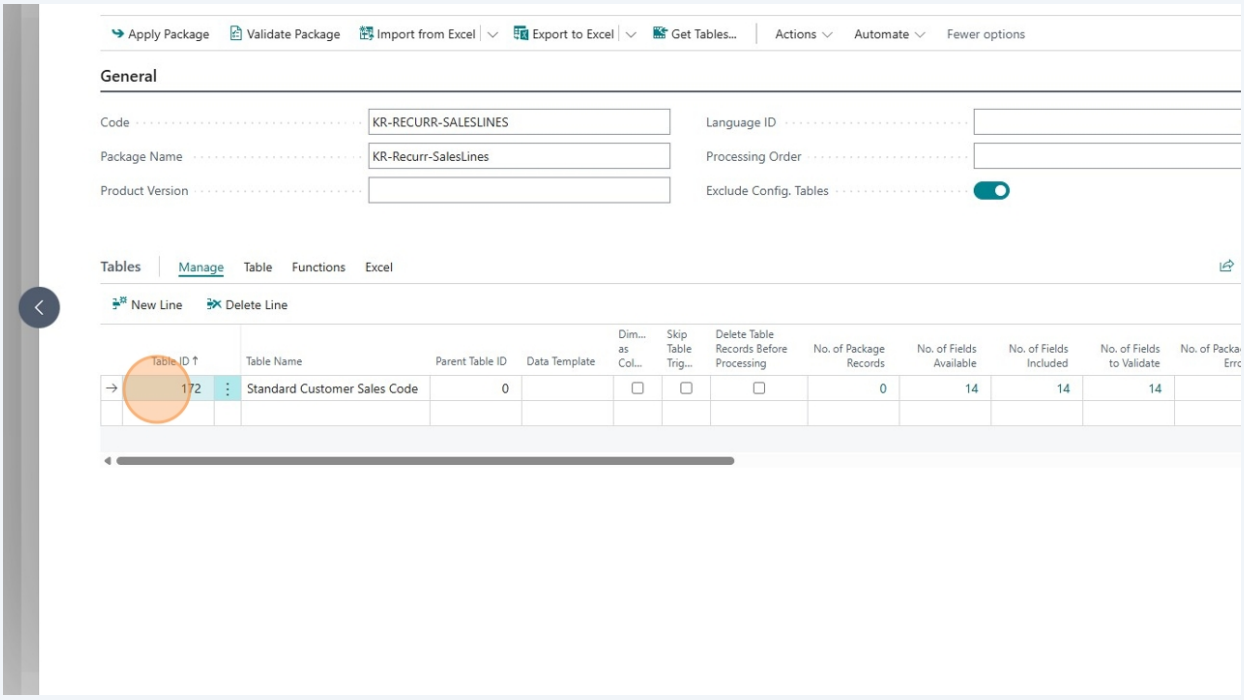


26 Click here.



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.



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