User Manual Aptean Food and Beverage ERP

Customer Item Catalog

Product Documentation

aptean

Contents

Release notes

Article • 12/19/2025 • 2 min read

To view what's new or changed in each release of the Aptean Customer Item Catalog extension, select the specific release version.

Business Central

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November 2025	2502.3.0.0	Stability release
October 2025	2502.2.0.0	Stability release
September 2025	2502.1.0.0	Stability release
September 2025	2502.0.0.0	Feature release
August 2025	2501.1.0.0	Stability release
July 2025	2501.0.0.0	Feature release
April 2025	2402.5.0.0	Stability release
January 2025	2402.4.0.0	Platform release
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December 2024	2402.2.0.0	Stability release
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November 2023	2301.2.0.0	Stability release
November 2023	2301.1.0.0	Stability release
October 2023	2301.0.0.0	Feature release
June 2023	1.15.106358.0	Stability release
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October 2022	1.8.63977.0	Stability release
October 2022	1.8.62943.0	Stability release
September 2022	1.7.61994.0	Feature release
May 2022	1.6.47327.0	Stability release

March 2022	1.5.45367.0	Stability release

Power Automate

Date	Release version	Description
July 2023	1.0.110595.0	Stability release
February 2023	1.0.80662.0	Stability release

2502.4.0.0

Release Note • 12/19/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, improvements have been made to the filtering logic used to calculate the **Invoiced Quantity (Base)** and **Last Sales Invoice Date** field values on the **Sales Order** page, improving overall performance. This enhancement addresses the issue reported in bug ID #342128.

Resolved issues

The following issue has been resolved in this release.

ID	Description
342128	A performance issue occurs when opening the **Sales Item Catalog** page from the **Sales Order** page with large number of invoice records, as the system takes longer to load due to unnecessary data validation.

> **Note**
>
> This fix extends the resolution implemented for bug ID #310395 in version 2502.2.0.0, and the complete resolution is achieved in this release.

2502.3.0.0

Release Note • 11/26/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
314233	The system incorrectly handles customer item catalog notifications on the **Sales Order** page when the unit of measure, item number, variant code, or sales price is updated on multiple sales document lines that do not match the corresponding item catalog entries.

2502.2.0.0

Release Note • 10/22/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
310395	A performance issue occurs on the **Sales Item Catalog** page when accessing it from the **Sales Order** page.

Note

This fix is partially addressed in this release, with the complete resolution implemented under bug ID #342128 in version 2502.4.0.0.

2502.1.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, the **E-mail Sender Customer Item Catalog** and **Name Sender Customer Item Catalog** fields have been removed from the personalization on the **Sales & Receivables Setup** page. This enhancement addresses the issue reported in bug ID #282481.

UI/UX changes

The **Email Sender Customer Item catalog** and **Name Sender Customer Item catalog** fields have been removed from the personalization on the **Sales & Receivables Setup** page.

Resolved issues

The following issue has been resolved in this release.

ID	Description
282481	The system incorrectly allows to add the obsoleted **E-mail Sender Customer Item catalog** and **Name Sender Customer Item catalog** fields on the **Sales & Receivables Setup** page from the personalization.

2502.0.0.0

Release Note • 9/24/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, when the Aptean Advanced Pricing extension is installed, you can configure whether the system must include items that are part of a specific item catalog or all customer catalogs in price list reports on the **Price Report Template** page. For more information, see Integration with Aptean Advanced Pricing.

Integrations

The Aptean Customer Item Catalog extension has been integrated with the Aptean Advanced Pricing extension. For more information, see Integrations.

2501.1.0.0

Release Note • 8/27/2025 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
307819	The system incorrectly restricts selecting the **Item Catalog** action on the **Sales Quote** page when creating a sales quote from the **Customer Card** page.
315265	The system incorrectly displays a notification about the customer item catalog requirement multiple times when a value is entered in the **Customer No.** field on the **Sales Order** page.

2501.0.0.0

Release Note • 7/30/2025 • 1 min read

Features

With the feature added in this release of the Aptean Customer Item Catalog extension, you can manage catalog behavior and private labeling directly from the template pages of customers and items.

UI/UX changes

The following UI/UX changes have been made in this release.

- The following fields have been added to the **Item Template** page.
  - Private Label
  - Update Item Catalog
- The **Item Catalog Mandatory** toggle has been added to the **Customer Template** page.

2402.5.0.0

Release Note • 4/28/2025 • 1 min read

Enhancements/Modifications

The translation file for the Swedish (sv-SE) language has been updated with standard texts for better readability.

2402.4.0.0

Release Note • 1/30/2025 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, the *Item Cross Reference* table relation has been removed from the *SalesItemCatalogBufferFDW* and *SalesItemCatalogFDW* tables, ensuring compatibility with Business Central, version 26.

2402.3.0.0

Release Note • 1/15/2025 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
257299	The system incorrectly displays a notification when adding a non-private label item to the sales order line on the **Sales Order** page, when a line with a private label item already exists.

2402.2.0.0

Release Note • 12/30/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
254336	The system fails to display an error message when a private label item is added to a sales order but does not exist in the customer item catalog. This issue occurs when the **Private Label** toggle on the **Prices & Sales** FastTab of the associated **Item Card** page is turned on.

2402.1.0.0

Release Note • 12/17/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, the translation file for the Chinese (zh-CN) language has been added.

2402.0.0.0

Release Note • 10/9/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, the following enhancements have been made:

- The system validates the order date on a sales order against the **Valid From Date** and **Valid To Date** fields on the **Item Catalog** page for the linked item catalog lines and displays an error for the item number if the date is outside the valid range.
- The system ensures that the order date is valid for all linked item catalogs when an item is associated with multiple catalogs and displays errors for each invalid item until all issues are resolved.

2401.13.0.0

Release Note • 10/3/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, the **Item Availability Check** FactBox on the **Sales Item Catalog** page displays details of the item's availability based on the location of the associated sales order header.

2401.12.0.0

Release Note • 8/23/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, the process has been enhanced to manage the *User Group* and *User Group Permission Set* tables. This ensures compatibility with both current and future versions of Business Central, even when these tables are deprecated.

> **Note**
>
> The *User Group* and *User Group Permission Set* tables are deprecated in Business Central, version 25.

2401.11.0.0

Release Note • 7/15/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
213233	An error occurs while changing the **Ship-to** field value on the **Shipping and Billing** FastTab of the **Sales Order** page. This issue arises when the sales order has existing sales lines, the associated customer is assigned with an item catalog code, and the **Item Catalog Mandatory** toggle on the **Customer Card** page is turned on.

2401.10.0.0

Release Note • 6/19/2024 • 1 min read

Enhancements/Modifications

The translation files for the following languages have been updated with standard texts for better readability.

- Swedish (sv-SE)
- Danish (da-DK)
- German (de-CH)
- French (fr-BE)
- French (fr-CH)
- Dutch (nl-BE)
- Dutch (nl-NL)

2401.9.0.0

Release Note • 5/24/2024 • 1 min read

Enhancements/Modifications

With this release of the Aptean Customer Item Catalog extension, modifications have been made to accommodate the following changes:

- Enhanced application interaction: Procedures have been added to enhance the application interaction, improve upgrade tag management, streamline upgrade and installation processes, and provide additional flexibility by managing upgrades on a per-company and per-database basis.
- Application area refresh: Updates have been implemented to improve the application area refresh process by integrating a new procedure into the *Enable* codeunit.
- Improved management of install and upgrade code: The *Install* and *Upgrade* codeunits have been updated to streamline the handling of installation, reinstallation, and upgrade processes, ensuring smoother transitions and minimizing disruptions during these operations.
- Centralized license management procedures: The existing license management codeunit has been modified to use centralized license management procedures, further reducing the need for application-specific adjustments.

2401.8.0.0

Release Note • 5/13/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
201673	When a sales order is created from the **Customer Card** page, the **Item Catalog** action is unavailable on the **Sales Order** page, preventing access to the **Sales Item Catalog** card page.

2401.7.0.0

Release Note • 4/17/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
192690	On the **Sales Order** page, upon selecting the **Item Catalog** action, the listing of the **Item No.** is displayed from bottom to top, because of the placement of the scrollbar at the bottom of the **Sales Item Catalog** page.

2401.6.0.0

Release Note • 4/17/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
188781	• An error occurs when executing the **Email Customer Item Catalogue** action on the **Customer Card** page. Upon selecting the **Current Email** action, the wizard confirms the account's existence, thereby preventing further action execution. • The system triggers notifications even after setting up the email.

2401.5.0.0

Release Note • 4/3/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
187014	An error occurs while creating a **Sales Invoice** with **Item Type** set as *G/L Account* in Business Central when *BASIC* permission sets exist for the user.

2401.4.0.0

Release Note • 2/21/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
177690	The **Update Item Catalog** field doesn't get updated as expected and a performance issue occurs on the **Sales Order** page, when the **Update Item Catalog** is set to *Always* on the **Item Card** page.

2401.3.0.0

Release Note • 2/13/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
149790	The sales item catalog buffer lines get deleted while executing the **Item Catalog** action on the **Sales Order** page when this extension is installed in conjunction with the Aptean **Transport** extension.

2401.2.0.0

Release Note • 9/16/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
173226	• An error occurs when entering the quantity in the sales order line. • An error occurs when trying to open the **Sales Item Catalog** page through a Sales Order.

2401.1.0.0

Release Note • 1/10/2024 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
168699	The **Update Item Catalog** field in the sales order line is not updated correctly when an item is added by searching the description instead of using the item number.

2401.0.0.0

Release Note • 1/10/2024 • 1 min read

Enhancements/Modifications

Modifications were made for the Aptean Customer Item Catalog extension to make the **Item Catalog** page accessible from the **Sales Quote** and **Blanket Sales Order** pages.

UI/UX changes

The **Item Catalog** action is added on the action bar of the **Sales Quotes** and **Blanket Sales Order** page.

2302.0.0.0

Release Note • 12/26/2023 • 1 min read

Enhancements/Modifications

Modifications were made for this extension to accommodate the changes in the Aptean Pricing Matrix extension. For more information, see Highlights of version 2301.0.0.0.

2301.3.0.0

Release Note • 12/1/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
157881	Upon inserting line items on **Sales Order** via **Item Catalog** function, the system fails to display the notifications in the mentioned scenarios: • Insufficient Inventory • Exceeded Credit limit.
162235	Upon posting a **Sales Order** with the **Item Catalog Mandatory** toggle enabled and the **Customer Item Catalog** configured, the system delays the posting, resulting in degrading performance.

2301.2.0.0

Release Note • 11/28/2023 • 1 min read

Enhancements/Modifications

The translation files have been updated to provide precise translations for field labels, tooltips, and other interface elements, resulting in improved accuracy and an enhanced user experience.

2301.1.0.0

Release Note • 11/15/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
154272	The ShowSalesLineNotification function within the PrivateLabel Codeunit leads to unusually long run-time, causing performance issues when dealing with a large number of records, specifically 750 or more.

2301.0.0.0

Release Note • 10/3/2023 • 1 min read

Features

With this release of the Aptean Customer Item Catalog extension, you can filter the customer item catalogs based on the item numbers and description.

Enhancements/Modifications

The **Item Catalog** page opens in an editable mode by default. To know more, see Item Catalog.

UI/UX changes

The **Item No.** and **Description** fields are added on the **Filters** FastTab of the **Customer Item Catalog** page.

> Note
>
> The **Description** field is not case-sensitive. Both fields display the result even when you enter the partial or full numbers or characters.

1.15.106358.0

Release Note • 6/28/2023 • 1 min read

Resolved issues

The following issue has been resolved in the release.

ID	Description
127053	Errors occur when processing sales documents, even if the user has Basic Permissions.

1.14.103701.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
118049	Upon importing the Customer Item Catalog via Power Automate in languages apart from English, the system throws an error due to an issue in the translated version.

1.13.96062.0

Release Note • 5/8/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
114115	Item Catalogs are not updated to Customer Item Catalog when the **Item Catalog Mandatory** toggle on the **Customer Card** page is turned off.

1.12.93676.0

Release Note • 9/16/2024 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
114122	When the *Always* option is selected in the **Update Item Catalog** field on the **Item Card** page and the **Enable Catalog Update** toggle on the **Customer Item Catalog Setup** page is turned on, the **Update Item Catalog** checkbox on the Sales Order lines is not automatically selected. Also, when the *Never* option is selected on the **Update Item Catalog** field on the **Item Card** page, the user is able to select the **Update Item Catalog** checkbox on the Sales Order line, and no error message appears.
112609	When the **Update Item Catalog** field on the **Item Card** page is left blank during the creation of an item, an error appears and the system does not allow the user to add items to the catalog lines.
112599	When a user tries to delete an Item catalog that contains Item Catalog lines, an error message containing a typo is displayed.
112608	Unable to release the Sales Order when an existing item is added to the Item Catalog line.

1.11.90092.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
108194	On the **Item Catalog** page, the default value of the **Quantity** field is *0*. While entering the value, the default value is not deleted automatically and the entered value is positioned before or after the default value.
108540	The notification *Setup Email is not Completed* continues to appear when using the **Email Customer Item Catalog** function even though the email setup has been done.

1.10.87410.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issues have been resolved in this release.

ID	Description
96786	The system permits adding items to the Item Catalog lines when the **Update Item Catalog** field on the item card is empty. Also, the Item **Description**, **Valid from Date** and **Valid to Date** were not updated on the Item Catalog lines.
97386	The presence of the **Customer No.** field in the Item Catalog line allows duplication of records as the same Item Catalog line can be created for different customers. Also, the system does not allow the creation of record with same **Item No.** and **Variant Code** but with different **Sales Unit of Measure** as it was not added as filter.

1.9.80403.0

Release Note • 4/29/2023 • 1 min read

Features

With this release of the Aptean Customer Item Catalog extension, you can access the following cues from the Role Center page for the Sales Order Processor and Business Manager roles:

Cue	
Item Catalog Activity	Valid Item Catalogs 7 days from now
	Invalid Item Catalogs 7 days from now
Incoming CIC Activity	Failed Incoming Customer Item Catalogs
	Open Sales Orders

Enhancements/Modifications

The Aptean Customer Item Catalog extension is now updated with minimal API to improve extensibility. The extensibility property applies to tables, pages, and other object types of this extension.

> **Note**
>
> Minimal APIs are a simplified approach for building fast HTTP APIs with ASP.NET Core. For more information, see [Minimal APIs overview | Microsoft Learn](https://learn.microsoft.com).

1.8.63977.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Minor technical changes were made to ensure the smooth functioning of the Aptean Customer Item Catalog extension.

1.8.62943.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

The SMTP Mail Setup feature has been deprecated in Business Central and it is replaced with Email Accounts to send mails to customers from a default mail ID. To know more, see Set up Email Accounts Administration.

1.7.61994.0

Release Note • 4/29/2023 • 1 min read

Features

With this release of Aptean Customer Item Catalog extension, you can

- Update the item catalog of the customers from sales lines and view the prices of the related records. This is enabled by the **Customer Item Catalog Setup**. To know more, see Customer Item Catalog Setup.
- Avoid duplication of items added to the Customer Item Catalog after the release of sales order. To know more, see Release of Sales Order.
- View the sales invoice details for a mentioned time period and access the sales item catalog from the **Sales Order** page. To know more, see Accessing the Sales Item Catalog page from Sales Order.
- Check and notify the currency code mismatch in the **Sales Item Catalog** and **Customer Card** page. To know more, see the Currency Code mismatch in the Customer and Sales document.

1.6.47327.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

Minor technical changes are made to keep our apps in line with the *updated* coding guidelines for Business Central.

1.5.45367.0

Release Note • 4/29/2023 • 1 min read

Enhancements/Modifications

The enhancement in this release is listed below:

- A localized version of Customer Item Catalog extension is made available for the Switzerland market with the addition of German language code [de-CH].
- Minor technical changes are made to keep our apps in line with the updated coding guidelines for Business Central.

Resolved issues

The following issue has been resolved in this release.

ID	Description
37768	Importing catalog from mail does not work due to the change in trigger.

1.0.110595.0

Article • 7/27/2023 • 1 min read

Enhancements/Modifications

The new Power Automate build tools have been employed to enhance efficiency and performance, and no other changes have been applied.

1.0.80662.0

Release Note • 4/29/2023 • 1 min read

Resolved issues

The following issue has been resolved in this release.

ID	Description
49733	The Power Automate currently in use for the Customer Item Catalog extension is outdated and insecure.

Introduction

Article • 4/3/2023 • 2 min read

The primary goal of the Aptean Customer Item Catalog (CIC) extension is to enter a sales order in a fast, structured and controlled manner. An item catalog may contain a variety of Item No/ Variant Code and Unit of Measure combinations. Multiple Item Catalog codes can then be linked to a customer via the **Customer Item Catalog** page. Based on this setup, the Sales Item Catalog page can be opened from the sales order, so you can quickly enter ordered quantities. And closing this page will create sales lines filled with quantities.

It is also possible to send the Customer Item Catalog as an Excel file via email to the customer. The customer can enter the desired order quantities in the Excel file and send it back. The received email with the attached Excel file will then result in an automatically processed sales order.

Some controls are executed when entering an item sales line directly. For a Private Label item i.e., the entered Item No./Variant Code must be included in the Customer Item Catalog. When the customer is set as Customer Item Catalog Mandatory= Yes, then the entered Item No./Variant Code and Unit of Measure must be included in the Customer Item Catalog.

Setup

Article • 12/27/2024 • 1 min read

The following setups are required.

- Manage permission sets
- Set item as private label
- Set item catalog mandatory for customer
- Set up item catalog
- Set up customer item catalog
- Export customer item catalog via email
- Set up export/import customer item catalog via email
- Set up Microsoft Power Automate

Manage permission sets

Article • 12/27/2024 • 3 min read

Permission sets in Business Central define a user's access level to various features and data within this extension.

We provide the following system permission sets:

- Direct
- Indirect

Direct permission sets

Users with this permission set can perform specific actions directly without requiring additional approvals or workflows. These sets include permissions to read, modify, delete, and create data.

The direct permission set ID for this extension is *CUSTITEMCATALOGFDW*.

Indirect permission sets

Users with this permission set can perform specific actions. This is used in conjunction with other permission sets to allow you to perform certain actions. These permissions typically involve additional conditions or approvals before the action can be completed.

The indirect permission set ID for this extension is *CUSTITEMCATBASICFDW*.

User-defined permission sets

In addition to the system permission sets we provide, you can create new permission sets or copy system permission sets and modify or delete access to specific entities according to your requirements. For more information, see Assign permissions to users and groups.

Assign a permission set

1. Select the Search icon  , enter **Users**, and then choose the related link.
   The **Users** list page opens.
2. Navigate to the username for which you want to assign the permission set and select it.
   The **User Card** page opens.

3. On the **User Permission Sets** FastTab, in the **Permission Set** field, enter the valid permission set for this extension.
   The associated fields are automatically updated based on the entered value.
   The user has the necessary permissions to use the features of the Aptean Customer Item Catalog extension, ensuring secure and role-based access.

Set item as private label

Article • 7/30/2025 • 4 min read

A private label item is intended for and may only be sold to a specific customer. For this purpose, an item has to be marked as a Private Label. It is not allowed to order a private label item if it doesn't exist in the Customer Item Catalog. If an item is selected in the sales order but not in the Customer Item Catalog, an error message appears.

If an item is set up as a private label and for that item, several variant codes are set up, an error will follow when entering an item/variant combination in a sales order line that is not present in the Customer Item Catalog. If the entered combination of item/variant exists in the Customer Item Catalog, the system checks if the order date of the sales order is equal or falls after the Valid from Date of the Item Catalog Line and if the order date is equal or falls before the Valid to Date. If the order date doesn't meet both requirements, the system displays an error message. See Set up the Item Catalog for more information.

1. Select the Search icon , enter **Items**, and then choose the related link.
   The Items list page opens.
2. Select the desired **No.**
3. On the **Prices & Sales** FastTab, turn on the **Private Label** toggle.
   When the **Private Label** toggle is turned on for an item and the item doesn't exist in any Item Catalog line, a notification appears, e.g., "Item No. doesn't exist in any Item Catalog Line." The notification is shown at the top of the **Item Card** page.
4. In the **Update Item Catalogs** field, select an option from the list.

The following options exist.

Option	Description
Always	The item gets updated automatically to the customer item catalog from the sales line.
Manual	You can manually update the item in the customer item catalog.
Never	The item is neither updated automatically from the sales line nor allowed to be manually updated in the customer item catalog.

The **Enable Catalog update from Sales Lines** toggle on the **Customer Item Catalog Setup** page is turned off, and if *Always* is selected in the **Update Item Catalogs** field on the selected **Item Card** page of the **Prices & Sales** FastTab, a notification appears.

Note

The system automatically updates the **Private Label** and **Update Item Catalog** field values on the **Item Template** page. These values are inherited from the associated fields on the **Item Card** page, and you can also manually select the field values.

Set item catalog mandatory for customer

Article • 4/3/2023 • 3 min read

If a customer is allowed to order items, variants, and unit of measure which are set up in their Customer Item Catalog, the customer must set Item Catalog as mandatory.

If the customer is only allowed to order items, variants, and unit of measure within their Customer Item Catalog, there is a check when entering directly on the sales order line. If the combination of the item number, variant code, and unit of measure doesn’t exist in the Customer Item Catalog, it isn’t allowed to sell the item to the customer and a notification appears. If the entered combination of the item number, variant code, and unit of measure exists in the Customer Item Catalog, the system checks if the order date of the sales order is equal or falls after the Valid from Date of the Item Catalog Line and if the order date is equal or falls before the Valid to Date. If the order date doesn’t meet both requirements, the system gives a notification. See Set up the Item Catalog for more information.

1. Select the Search icon , enter **Customers**, and then choose the related link.
   The **Customers** list page opens.
2. Select the desired **No.**
   The **Customer Card** page opens.
3. On the **General** FastTab, turn on the **Item Catalog Mandatory** toggle.
   When the **Item Catalog Mandatory** toggle is turned on for a customer and the customer doesn’t have any customer item catalogs set up, a notification appears, e.g., "Customer No. C0011 doesn't have any Customer Item Catalogs." The notification is shown in a blue bar at the top of the **Customer Card** page.

Set up item catalog

Article • 4/29/2023 • 5 min read

When a group of customers uses the same Item Catalog (i.e., they frequently order the same group of items), it is helpful to control the different groups of items once instead of multiple times (per customer). Therefore, an Item Catalog can be created. An Item Catalog can be linked to multiple Customers/Ship-to Addresses, see Set up Item Catalog per Customer for more information.

To open the **Item Catalogs** list page, select the Search icon , enter **Item Catalogs**, and then choose the related link.

Set up a new item catalog with validity date

1. On the action bar, select **New**.
2. In the **Code** field, enter a code, e.g., "BBQ".
3. In the **Description** field, enter the text that describes the item catalog, .e.g., "Barbecue Catalog".
   It is possible to set up a Valid from date and a Valid to date per Item Catalog. This indicates from and to when the Item Catalog is valid.
4. In the **Valid from Date** field, select the date from the calendar from which the item catalog is valid.
5. In the **Valid to Date** field, select the date from the calendar to which the item catalog is valid.

Add items to item catalog lines

With the Item Catalog Lines, you can set up the items that should be linked to a certain Item Catalog. It is possible to select a different Sales Unit of Measure and Variant Code.

1. On the **Item Catalogs** page, on the action bar, select **More Options** > **Actions** > **Item Catalog Lines**.
   The selected **Item Catalog** page opens.
2. On the action bar, select **New**.
3. In the **Item No.** field, select a value from the list.

> **Note**
>
> You can access the **Item Catalog** page by selecting **Actions** > **Functions** > **Item Catalog** on both the **Sales Quotes** and **Blanket Sales Order** pages.

Sort items and set validity dates in item catalog lines

The item numbers in the Item Catalog are sorted in the order of entering the lines. You can change the order of the items with the Move Up and Move Down action buttons. This adjusts how the items are displayed when the Item Catalog is opened from the sales order.

1. Navigate to the desired Item **No.**
2. On the action bar, select the **Move Up** action button to move the selected line upwards in the list.
3. Click the **Move Down** action button to move the selected line downwards in the list.
   Like in the Item Catalog, it is possible to specify a Valid from the date and Valid to date. However, the specific dates on the Item Catalog Lines must be within the date range of the Item Catalog. This indicates from and to when the specific item in the Item Catalog is valid.
   When entering a sales line manually, the validity of the item will be checked with the dates in the Item Catalog lines if the item is set up as Private Label and/or when the customer is set as Item Catalog mandatory. When opening the Sales Item Catalog page or exporting the email with the Customer Item Catalog, these dates are considered. The Sales Item Catalog page and the email with the Customer Item Catalog attached, are created based on the validity of these dates.
4. In the **Valid from Date** field, select the date from which the item is available within the item catalog.
5. In the **Valid to Date** field, select the date from the calendar until which the item is available within the item catalog.

Validate sales orders and manage errors

If the **Order Date** field on the **Sales Order** page is not within the range of the **Valid From Date** and **Valid To Date** fields of the linked item catalog lines, the system displays an error message, prompting you to either adjust the order date or delete the invalid sales lines.

If an item number is linked to multiple item catalogs for the same customer, the order date must be valid for all linked item catalog lines. If the order date is outside the valid range for any linked item catalog line, the system displays an error for the invalid item number and prevents to proceed further.

Set up customer item catalog

Article • 7/30/2025 • 8 min read

Multiple Item Catalogs can be linked to a customer or to a combination of Customer/Ship-to Address via the setup of the Customer Item Catalog. This is done to indicate which catalogs belong per customer.

Customer item catalog setup

1. Select the Search icon , enter **Customer Item Catalog Setup**, and then choose the related link.
   The **Customer Item Catalog Setup** page opens.
2. On the **Customer Item Catalog** FastTab, turn on the **Enable Catalog update from Sales Lines** toggle to update the item catalog from the sales lines.
3. In the **Sales History Inclusion Timeframe** field, enter a value.
   It shows the sales history for the item catalog. For example, 1D = 1 day, 1M = 1 month and 1Y = 1 year.
4. Turn on the **Show Related Price List Records** toggle to display the price list records associated with the item catalog.

Set up item catalog per customer

1. Select the Search icon , enter **Customers**, and then choose the related link.
   The **Customers** list page opens.
2. Select the desired **No.** to open the **Customer Card** page.
3. On the action bar, select **More Options** > **Related** > **Customer** > **Item Catalogs**.
4. In the **Item Catalog Code** field, select a value from the list.
5. While creating the Customer Item Catalog, a notification appears as *It's possible to set up Customer Item Catalogs for Ship-to Addresses*.
   The notification is displayed when the customer has Ship-to Addresses setup and there is no Customer Item Catalog setup for any of these Ship-to addresses. The notification can be disabled.
6. When creating the Customer Item Catalog, a notification appears as *It's possible to make Item Catalog Mandatory for the Customer No. xxx*.
   The notification is displayed when the **Item Catalog Mandatory** toggle is turned off on the **Customer Card** page. The notification can be disabled.
7. The **Description** field is automatically populated based on the selection of **Item Catalog Code**.
8. In the **Sales Price List** field, select a value from the drop-down list.
   You can select only the Sales Price List with active status on the **Sales Price List** page or an error appears.

9. **Assign-To Type** and **Assign-To** fields are automatically populated based on the selection of the value in the **Sales Price List** field.
10. Turn on the **Update from Sales** toggle against the required Item Catalog line to update the customer item catalog lines from the sales lines, .
    If the **Update from Sales** toggle is turned on for multiple lines on the **Customer Item Catalog** page, an error appears.
    Only one line in the **Customer Item Catalog** page can have the **Update from Sales** toggle turned on.
11. The Enable Catalog update from Sales Lines toggle on the Customer Item Catalog Setup page is turned off, and if Update from Sales Line check box is selected, on the **Customer Item Catalogs** page, an error appears.
    The Item Catalog is now set up for this customer.

> **Note**
>
> The system automatically updates the **Item Catalog Mandatory** field values on the **Item Template** page. These values are inherited from the **Item Catalog Mandatory** field value on the **Customer Card** page, and you can also manually select the field values.

Set up item catalog per ship-to address

Multiple Item Catalogs can be linked to a combination of Customer/Ship-to Address via the setup of the Customer Item Catalog. This is done to indicate which catalogs belong per Ship-to Address of the Customer. If no Item Catalogs are linked to the selected combination of Customer and Ship-to Address in the sales order, the Item Catalog lines that are linked to only the Customer will be shown on the Sales Item Catalog page. See Fast Order Entry: enter sales line via Sales Item Catalog for more information.

1. Select the Search icon , enter **Customers**, and then choose the related link.
   The Customers list page opens.
2. Select the desired **No.** open the **Customer Card** page.
3. On the action bar, select **More Options** > **Related** > **Customer** > **Ship-to Addresses**. On the **Ship-to Address** List page, select a Ship-to Address.
4. On the action bar, select **Related** > **Item Catalogs**.
5. On the **Customer Item Catalogs** page, fill in the necessary fields. For more information, see Set up Item Catalog per Customer.

The Item Catalog is now set up for this Ship-to Address.

Sort items in customer item catalog

The Item Catalog Codes are sorted in the order of entering the lines. You can change the order of the items with Move Up and Move Down action buttons. This adjusts the way the Customer Item Catalogs are displayed when the Catalog is opened from the sales order and when the Item Catalog is sent to a customer with an email.

1. On the **Customer Item Catalogs** page, navigate to the desired **Item Catalog Code**.
2. On the action bar, select the **Move Up** action button to move the selected line upwards in the list.
3. Select the **Move Down** action button to move the selected line downwards in the list.

Export customer item catalog via email

Article • 4/29/2023 • 1 min read

It is possible to send an email to a customer with an attached file that contains the Customer Item Catalog. This email informs the customer of the current catalog.

1. Navigate to the desired **Customer Card** page.
2. On the action bar, select **More options** > **Actions** > **Email Customer Item Catalog...**
   The **Mail Customer Item Catalog** dialog box opens.
   It is possible to send a Customer Item Catalog that is set up for a specific Ship-to Address.
3. The **Customer No.** field is automatically populated.
4. In the **Ship-to Code** field, click the AssistEdit button.
5. The **Ship-to Address** list page opens.
6. Select the desired **Code** and click **OK**.
7. The **Ship-to Code** field is filled. Click **OK**.

When mailing the Customer Item Catalog, the Work Date will be used to check if there are valid Item Catalog lines. If there are no Item Catalog lines that are valid on the work date, no email will be sent to the customer and the related notification is shown on the **Customer Card** page.

If the email is successfully sent to the customer, a notification, *Email successfully sent to* jdoe@aptean.com, will show in a blue bar at the top of the **Customer Card** page.

Set up export/import customer item catalog via email

Article • 4/3/2023 • 6 min read

To send the Customer Item Catalog via email, the following configuration steps must be performed.

Set up email accounts

To send and receive emails within Dynamics 365 Business Central, you can set up the required settings on the **Email Accounts** page.

1. Select the Search icon , enter **Email Accounts**, and then choose the related link.
   The **Email Accounts** list page opens.
2. To create a new sender account:
   a. On the action bar, select **New** > **Add an email account**.

      Alternatively, select the Search icon , enter **Set Up Email**, and then choose the related link.
      The **Set Up Email** page opens.

   b. Click **Next**.

   c. Navigate to the desired line from the list to specify the type of email account that must be added.

   d. Click **Next**.

   e. Fill in the required fields.

   f. Click **Next**.
      The new sender account is created.

3. To send email from an existing list:
   a. Navigate to the **Email Accounts** page.

   b. On the action bar, select **Navigate** > **Email Scenarios**.
      The **Email Scenario Assignment** page opens.
      It displays the list of email IDs configured to the Email Accounts.

   c. Navigate and select the desired record.

   d. On the action bar, select **Assign Scenarios**.
      It displays all the Email Scenarios associated with Email Accounts.

   e. Select **Customer Item Catalog**.

   f. Click **OK**.
      It assigns the selected email ID to the Customer Item Catalog.

> **Note**
>
> Only one Email ID can be assigned to one scenario.

All the Email sent from Customer Item Catalog is sent from the assigned Email ID only.

Set up outgoing email through assisted setup

When you are setting up email configuration for the first time, you have to follow the below steps:

1. Select the Search icon , enter **Assisted Setup**, and then choose the related link.
   The **Assisted Setup** page opens.
2. Select **Setup outgoing email** from the list.

   The **Email Accounts** list page opens.
   Follow the instructions provided in the [Set up email accounts](#) from step 2.

Set up email address for a customer

To send an email to a customer with the attached file containing Customer Item Catalog, you must fill in the fields on the customer card page.

1. Navigate to the desired **Customer Card** page.
2. On the **Address & Contact** FastTab, in the **Email** field, enter the customer's email address.

Set up email subject and body text for a customer

You can specify the subject and body text when sending an email to the customer with the Customer Item Catalog attached.

1. Navigate to the desired **Customer Card** page.
2. On the action bar, select **Related** > **Customer** > **Email Text Item Catalog**.
3. In the **Email Text Code** field, select the drop-down.
4. Select + **New**.
   The **Email Text Customer Item Catalog** page opens.
5. In the **Code** field, enter a code to identify the textual content of the email that contains the customer item catalog and that is sent to the customer.

6. In the **Description** field, enter the information.
7. In the **Subject Description** field, enter the details.
8. In the **Body Description** field, enter the description.
9. Select **OK**.
   If the email text customer item catalog is not set up, a notification, *Email Text Customer Item Catalog isn't set up*, will appear. Since the email text is not mandatory, the notification can be disabled.

Set up Microsoft Power Automate

Article • 4/29/2023 • 2 min read

Import customer item catalog excel from email

After sending an email to a customer with the Customer Item Catalog excel file attached, the customer can fill in the quantities in it for the items to be ordered. The customer can then reply to the received email and attach the edited file. When the mail with the edited file is received back, it can be automatically converted into a sales order with the correct items, variants, units of measure, and quantities.

To download the Customer Item Catalog Power Automate zip file, click here.

Prerequisites

To process the received email with the Excel file automatically into a sales order, you must set up the Microsoft Power Automate Solution Customer Item Catalog (Managed). To know more, see Deployment Instructions.

You also need

- A generic email address to which customers can send the filled item catalog. This email address will be used to set up Microsoft Power Automate.
- The Outlook-folders used when setting up the Customer Item Catalog solution should exist.

The Power Automate checks whether the sender of the email is present in the Dynamics 365 Business Central. Therefore the customer's email address must be set up on the customer card. To know more, see Set up export/import Customer Item Catalog via email.

Automatically process received customer item catalog into sales order

Article • 4/29/2023 • 3 min read

After sending a mail to a customer with the Customer Item Catalog in the attachment, the customer can fill the quantities in the Excel file for the items he wants to order. The customer then can reply to the received mail and attach the edited file. When the mail with the edited file is received back, then it will be automatically processed into a sales order with the correct items, variant, unit of measure, and quantities.

Open exported customer item catalog via email

The customer has received the email and can open the attached Customer Item Catalog.

1. Select the received email.
   The previously set up subject and body text are shown in the email.
2. Click **Download**.
   The **Customer No**, **Customer Name** and the **Ship-to Code** are automatically filled in the Excel file. The customer can then fill the **Requested Delivery Date** and requested quantity.
3. Save the Excel file, reply to the received email, add the Excel as an attachment and send the email.

Open automatically created sales order

When the email is received from the customer, open the Incoming Item Catalogs.

1. Select the Search icon , enter **Incoming Customer Item Catalogs**, and then choose the related link.
   The **Incoming Customer Item Catalogs** page opens.
2. Select the specified line on the **Incoming Customer Item Catalogs** page.
3. On the action bar, select **Navigate** > **Card**.
   This will open the **Sales Order** which is automatically created for this Incoming Customer Item Catalog.
   The Ship-to Code from the Excel file is automatically processed on the **Sales Order**.

The sales order is created with the correct items and quantities.

Manually process received file customer item catalog if an error occurs

Article • 4/3/2023 • 3 min read

If the customer used a different "From" mail address instead of the mail address that is set up on the customer card page, the email will automatically be moved to the Error-folder of hot mail inbox. If the customer forgot to attach the Excel file with the Customer Item Catalog, the email is not moved but it will remain in the Inbox-folder.

When the customer uses the correct "From" mail address and the Excel file is correctly attached, the system still can run into an error when processing the Excel file into a sales order. In that case, a new line is created in the Incoming Item Catalogs page with a failed status. It's possible to manually process the received file into a sales order.

Open the excel file with the received customer item catalog

When the email is received from the customer, open the Incoming Item Catalogs.

1. Navigate to the specified **Incoming Customer Item Catalogs** page.
2. The **Status** field with the value *Failed* indicates that the email isn't automatically processed into a Sales Order.
3. The **Message** field shows the reason why the email isn't automatically processed into a Sales Order.
4. Select the **Excel** field with the value **Yes**.
   This automatically opens the Excel file.

The Excel file contains the Customer Item Catalog that is sent by the customer.

The Sales Order can then be created manually based on the Excel file.

Change the status to closed

After creating the Sales Order, the record in the **Incoming Customer Item Catalogs** page can be closed.

1. Navigate to the desired line on the **Incoming Customer Item Catalogs** page.
2. Select the **Status** field with the value *Failed*.
3. On the action bar, select **Process** > **Close**.

Delete lines in incoming customer item catalog

It is possible to remove lines with Status= Closed in the Incoming Customer Item Catalogs table. By deleting this records, the Incoming Customer Item Catalogs table becomes more clear and organized.

1. Select the Search icon , enter **Delete Incoming Customer Item Catalogs Lines**, and then choose the related link.
   The **Delete Incoming Customer Item Catalogs Lines** page opens.
2. In the **Deletion Date** field, enter the deletion date.
3. Select **OK**.

All the records with status **Closed** up until the selected date are deleted.

Fast Order Entry: enter sales line via sales item catalog

Article • 4/3/2023 • 10 min read

By using the Sales Item Catalog page, it is possible to quickly create sales order lines. This page can be opened from within the sales order and it contains the Item Catalog lines that are linked to the customer via the Customer Item Catalog table. On the page only the Quantity field is editable. Closing the page automatically creates sales order lines for every Sales Item Catalog line with a Quantity above zero.

Create a new sales order

It is possible to quickly create sales order lines by using the page Sales Item Catalog. This page can be opened from within the sales order and it contains the Item Catalog lines that are linked to the customer via Customer Item Catalog table .

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
   The **Sales Orders** list page opens.
2. On the action bar, select **New**.
3. The **Sales Order** page opens.
4. In the **Customer Name** field, select the AssistEdit button to open the **Customers** page.
5. Select the desired customer and click **OK**.
   The Sales Order is now created.

Update item catalog field in sales order

The **Update Item Catalog** field values are updated on the sales order based on the information provided in the **Update Item Catalog** field on the **Item Card** page and the **Enable Catalog Update from Sales Lines** field on the **Customer Item Catalog Setup** page.

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
   The **Sales Orders** list page opens.
2. Select the desired **No**.
   The **Sales Order** page opens.
3. On the **Lines** FastTab, **Update Item Catalog** field appears.
   If the checkbox is selected, it indicates that the item is to be updated to the customer item catalog from the

sales line.
For this, all the following conditions must be true:

a. On the **Item Card** page, in the **Prices & Sales** FastTab, in the **Update Item Catalog** field, the value is 'Always'.
b. On the **Customer Item Catalog Setup** page, the **Enable Catalog Update from Sales Lines** toggle is turned on.
c. On the **Customer Item Catalogs** page, the **Update from Sales Line** check box is selected.
d. On the **Customer Card** page, in the **General** FastTab, the **Item Catalog Mandatory** toggle is turned on.
e. On the **Item Card** page, in the **Prices & Sales** FastTab, the **Private Label** toggle is turned on.
If the checkbox is cleared, then it indicates that the item already exists in the customer item catalog and has moved from the sales line.
For this, either one or all the following conditions must be true:
f. On the **Item Card** page, in the **Prices & Sales** FastTab, in the **Update Item Catalog** field, the value is 'Manual' or 'Never'.
g. On the **Customer Item Catalog Setup** page, the **Enable Catalog Update from Sales Lines** toggle is turned off.
h. On the **Customer Item Catalogs** page, the **Update from Sales Line** check box is cleared.

Open the page sales item catalog on the sales order

When a customer is set as Item Catalog Mandatory = Yes, a notification will be shown after creating a sales order. The page Sales Item Catalog can be opened directly from this notification which contains the Item Catalog lines that are linked to the customer.

1. Click the link **It's easier to use Item Catalog** to create sales lines on the **Sales Order** page.
   When the customer is set as Item Catalog Mandatory = No, the notification will not appear. It is still possible to use the page **Sales Item Catalog** for quick order entry.
2. On the action bar, select **Actions** > **Functions** > **Item Catalog**.
   If no Item Catalogs are linked to the selected combination of Customer and Ship-to Address in the sales order, the Item Catalog lines that are linked to only the Customer will be shown on the Sales Item Catalog page.
   The page also shows the item reference if the combination of item and unit of measure is set up for the customer that is selected in the sales order. If you enter an item reference between yours and your customer's item number, then this number will override the standard item number when you enter the item reference number on a sales document. Item references allow you to create a reference between your system and your customer's system to replace item numbers that you use at the time of document issuance. This allows you to maintain the item codes in your system but present the sales item using codes that are in their system.
   Only the **Quantity** field is editable on the Sales Item Catalog page. The page only shows those lines where the order date of the sales order is equal or falls after the Valid from Date of the Item Catalog Lines and where the order date is equal or falls before the Valid to Date. If the order date doesn't meet both requirements, the items are not shown and therefore cannot be selected on this page.
3. Enter **Quantity**.

4. Click **OK**.
   This creates sales order lines for every Sales Item Catalog line with a Quantity above 0.
5. Enter **Quantity**.
6. Click **Cancel**.
   This opens a new dialog box.
   It is possible to save the Sales Item Catalog if the quantity is filled.
   The dialog box displays the message, **Sales Item Catalog still contains quantities. Do you want to save these?**
7. Click **Yes**.

When re-opening the page Sales Item Catalog, the quantities will be shown on the correct item line.

Accessing the sales item catalog page from sales order

You can access the Sales Item Catalog page from the Sales Order page where you can view the sales invoice details for a selected timeframe.

1. Select the Search icon , enter **Sales Orders**, and then choose the related link.
   The **Sales Orders** list page opens.
2. Select the desired **No**.
   The **Sales Order** page opens.
3. On the action bar, select **More actions** > **Actions** > **Functions** > **Item Catalog**
4. Select the value in the **Invoiced Quantity Base** field for the desired record which specifies the total number of items that are sold in the mentioned timeframe.
   This opens a page with posted sales invoice details. The sales invoice records are displayed based on the value entered in the **Sales History Inclusion Timeframe** field on the **Customer Item Catalog Setup** page.
   For example, if 1Y is entered in the **Sales History Inclusion Timeframe** field on the **Customer Item Catalog Setup** page, then the page displays the sales invoice records for one year back from the Posting Date.
   If the **Sales History Inclusion Timeframe** field is left blank, no result is displayed.
5. The **Last Sales Invoice Date** field displays the recently posted sales invoice date.

Sales item catalog Lines associated with sales price list

On the Sales Item Catalog page, the line item is expanded to find the sales price list of items associated with the customer when the following conditions are satisfied:

1. On the **Customer Item Catalog Setup** page, the **Show Related Price List Records** toggle is turned on.
2. On the **Feature Management** page, in the **Feature** field, **Feature Update :New sales pricing experience** is enabled for *All Users*.

> **Note**
>
> System will not allow reverting the Feature Management Extension once installed.

3. On the **Sales Price List** page for the selected record, on the **General** FastTab, in the **Status** field, *Active* is selected from the drop-down list.
4. Navigate to the **Sales Item Catalog** page for the desired customer.
5. Click the desired sales line item which expands to display the related sales price of the item inherited from the Sales Price List selected on the **Customer Item Catalogs** page.
   The **Item Availability Check** FactBox provides an overview of the item's availability based on the location of the associated sales order header.

Release of sales order

Article • 4/3/2023 • 2 min read

The selection of the **Update Item Catalog** check box on the **Sales Order** page indicates that the item in the sales line is not updated on the **Customer Item Catalog** page. When **Release** action is performed, the item gets inserted with the details such as Item No., Variant Code/UOM from the sales line.

1. Navigate to the desired **Sales Order** page.
2. On the **Lines** FastTab, the **Update Item Catalog** field appears.
   If the checkbox is selected, it indicates that the item gets updated to the customer item catalog from the sales line.
3. On the action bar, select **Release** > **Release.**
   This action moves the added item to the **Customer Item Catalog** page, and now the **Update Item Catalog** checkbox is cleared.
   When an item exists on the **Customer Item Catalog** page, and the user tries to select the **Update Item Catalog** checkbox, an error appears.
   When you reopen the sales order for an item that was already released and perform release action as per step 4, the **Customer Item Catalog** is neither updated nor the record duplicated.

Currency code mismatch in the customer and sales document

A notification appears on selecting a line record on the Sales Item Catalog page when the Currency Code in the **Customer Card** page and **Sales Price** list page is different. When the Currency Code is blank on the **Customer Card** page, the Currency Code from General Ledger Setup is automatically inherited.

1. Navigate to the **Sales Item Catalog** page for the desired customer.
2. Select the desired line record.
   The system checks and compares the Currency Code of items on the **Customer Card** page and **Sales Price** list page related to the Customer Item Catalog. If any mismatch is found, a notification appears.

Check item catalog mandatory and private label when entering a sales line manually

Article • 12/1/2025 • 2 min read

If the customer is only allowed to order items within his catalog, there is a check when an item number is entered directly in the sales order line. If the item number in combination with the variant and unit of measure doesn't exist in the Customer Item Catalog, it isn't allowed to sell the item to this customer.

If the **Private Label** checkbox is selected for an item, you cannot sell the item unless it exists in the customer item catalog. If the item, variant, and unit of measure combination that you select on the sales order does not exist in the catalog, the system shows a notification. Additionally, you will also receive an error message when you try to release the order.

Entering an item manually on a sales order line

When entering a sales line manually on a sales order where the Customer is set as Item Catalog Mandatory = Yes, a notification will occur when for the first time a combination of an Item, Variant and Unit of Measure is entered that does not exist in the Item Catalog.

- The notification indicates which Item No., Variant Code, and Unit of Measure is not set up in the Customer Item Catalog.
- If you manually enter a sales line on a sales order, the system shows a notification if the private label item, variant, and unit of measure combination you enter does not exist in the customer item catalog.

Changing the order date, sell-to customer or ship-to address on a sales order

When the Order Date, Sell-to Customer or Ship-to Address is changed in a sales order with existing lines and the (new) customer is set as Item Catalog mandatory = Yes, an error will be thrown. In this case, the sales lines should be deleted.

When the Order Date, Sell-to Customer or Ship-to Address is changed in a sales order with existing lines and the sales line include a Private label Item, an error will be thrown. In this case, the sales line that contains the Private Label item should be deleted.

Deployment instructions

Article • 4/29/2023 • 1 min read

To set up the Aptean **Customer Item Catalog** extension on your Business Central environment, click the corresponding links in the table.

Item	Link
Prerequisites	Click here
App specific instructions	Click here

Integrations

Article • 9/24/2025 • 1 min read

The Aptean Customer Item Catalog extension has been integrated with the following extension:

- Aptean Advanced Pricing

Aptean Advanced Pricing

Article • 9/24/2025 • 1 min read

When the Aptean Customer Item Catalog extension is used in conjunction with the Aptean Advanced Pricing extension, you can configure whether the system must include items that are part of a specific item catalog or all customer catalogs in price list reports on the **Price Report Template** page. For more information, see Create price report templates.