

YAVEON

ProBatch 365 Sales & Purchase

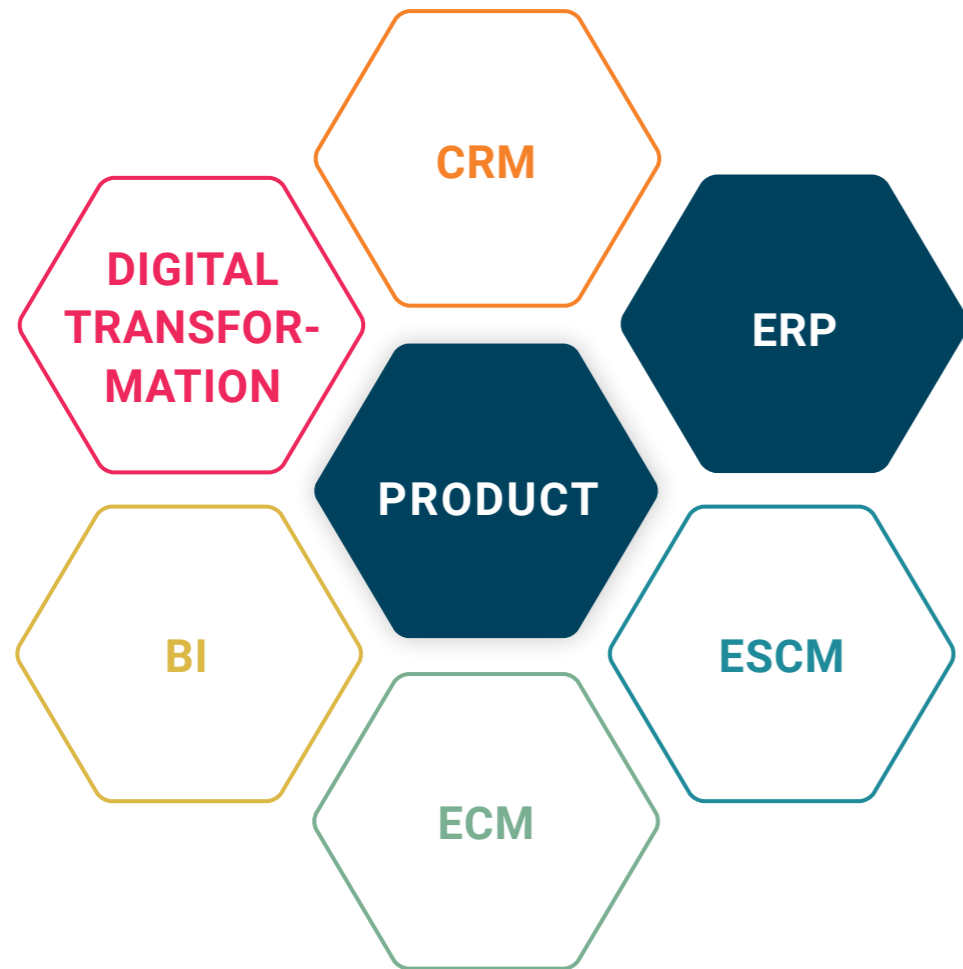
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Microsoft
Partner



EVERYTHING AT A GLANCE



BASIS

Microsoft Dynamics 365 Business Central

COMPANY SIZE

Small and medium-sized companies

INDUSTRIES

Chemicals, pharmaceuticals, biotechnology, cosmetics, food, medical technology



1

DELIVERY TOLERANCES

2

PURCHASING & SALES QUALIFICATIONS

3

EXTENSION OF BLANKET ORDERS AND BLANKET PURCHASE ORDERS

HOW DOES THIS WORK EXACTLY? THE FEATURES

Adjust the delivery quantity

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

Make compliance easy

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

Handle Purchasing

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

Keep an overview

A purchase line list and a sales line list make it easier to keep track of all sales and purchase activity by eliminating the need to scroll through a series of purchase and sales documents. These lists can be easily filtered, searched, sorted and exported to facilitate analysis.

Keep control

With ProBatch 365 Sales and Purchase, you can limit the number of suppliers from which an item can be purchased via Purchase Approval for items. The number of customers allowed to buy an item can also be restricted via Sales Approval for Items. This feature can be used in situations where licenses or permits are required for the purchase and sale of goods, such as in the pharmaceutical retail sector.

Stay up to date

When planning or creating purchasing or sales documents, use the capabilities offered by blanket orders, such as the validity period of the contract, information about outstanding call-off quantities or existing blanket orders.

Document Type	Doc. No.	Traffic Light	Buy-From Vendor No.	No.	Description	Quantity	Unit of Meas. Code	Outstanding Quantity	Expected Receipt Date	Unit Price (EUR)	Line Amount Excl. VAT	Location Code
Order	106235	●	K00040	E1200000	Sylfold	20.400	KG	0	09.09.2020	0,00		MUNICH
Order	106235	●	K00040	E1200003	Pure water	5.500	L	0	09.09.2020	0,00		MUNICH
Order	106235	●	K00040	E1200004	API YAVIPROFEN	770	KG	0	09.09.2020	0,00		MUNICH
Order	106236	●	K00050	E1200005	Instruction Leaflet	9.000	PCS	0	25.09.2020	0,00		MUNICH
Order	106237	●	K00040	E1200000	Sylfold	5.000	KG	0	25.09.2020	0,00	75.000,00	MUNICH
Order	106237	●	K00040	E1200001	Ethanol	1.000	L	0	25.09.2020	0,00	12.000,00	MUNICH
Order	106237	●	K00040	E1200004	API YAVIPROFEN	500	KG	0	25.09.2020	0,00	39.500,00	MUNICH
Order	106240	●	K00060	E1300000	YAVINIGHT 50ml	2.400	PCS	2.400	22.09.2020	0,00	48.000,00	MUNICH
Order	106243	●	K00050	E1200002		5	KG	0	16.09.2020	0,00		MUNICH
Order	106243	●	K00050	E1200002	Pharmacoat	8	KG	8	16.09.2020	0,00		MUNICH
Order	106244	●	K00050	E1200002		10	KG	0	16.09.2020	0,00		MUNICH
Order	106249	●	K00070	E1200000	Sylfold	210	KG	210	16.01.2021	0,00	886,20	MUNICH
Order	106249	●	K00070	C1300010	Label	150	PCS	150	16.01.2021	0,00	15,00	MUNICH
Order	106249	●				0		0		0,00		
Order	106250	●	K00090	C1000001	YAVICOLOUR blue	2.500	L	2.500	04.11.2020	0,00	15.000,00	COLOGNE
Order	106250	●	K00090	C1000002	YAVICOLOUR red	1.250	L	1.250	04.11.2020	0,00	6.250,00	COLOGNE
Order	106251	●	K00070	C1000002	YAVICOLOUR red	2.500	L	2.500	04.11.2020	0,00	12.500,00	BERLIN
Order	106251	●	K00070	C1000001	YAVICOLOUR blue	1.500	L	1.500	04.11.2020	0,00	9.000,00	BERLIN
Order	106252	●	K00100	C1000001	YAVICOLOUR blue	1.200	L	0	05.11.2020	0,00	7.200,00	COLOGNE
Order	106252	●	K00100	C1000002	YAVICOLOUR red	1.200	L	0	05.11.2020	0,00	6.000,00	COLOGNE

Item No.	Description	Vendor No.	Vendor Name	Quote No.	Order No.	Quantity	Unit of Meas. Code	Req. Rec.
C1000001	YAVICOLOUR b...	K00040	Alphapharm GmbH	1017	106271	1,000	L	31,0
		K00050	Pharma Print	1018		1,000	L	31,0
		K00060	Alpine Ointment Co...	1019		1,000	L	31,0
C1000002	YAVICOLOUR r...					0		
		K00040	Alphapharm GmbH	1017	106271	1,000	L	31,0
		K00050	Pharma Print	1018		1,000	L	31,0



Blanket Sales Order
1005 · Van Bommel Pharmacy Utrecht

Process: Request Approval, Print/Send, Release, Order, More options

General

Customer Name: Van Bommel Pharmacy Utrecht

Contact: Salesrep

No. of Archived Versions: 0

Retrieve Invoice Discount autom.:

Document Date: 05.01.2020

Due Date: 26.01.2020

Order Date: 05.01.2020

Lines	Manage	Line	Functions	Feewer options
Type	No.	Description	Quantity	Minimal Quantity to Call-Off
Item	E1300002	YAVINIGHT 100ml	20	2
Item	E1300002	YAVINIGHT 100ml	5	0
Item	E1300002	YAVINIGHT 100ml	5	0

Subtotal Excl. VAT (EUR): 124.950,00

Incl. Discount Amount Excl. VAT (EUR): 0,00

THE YAVEON PROBATCH 365 BASE APP

That all sounds excellent.

But wasn't there something about a surprise?

That's right, the **YAVEON Base app:**

It is more than a base. It is your foundation.

Set up traffic light rules for tables

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

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

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

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

Set up extended texts

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

Set up master data features

Assign features with a specific value to an item. You can also set up features whose value is calculated via a formula based on the values of other features.

Do you want to search for items with specific features? Just use the feature search. You can filter an item list so that only the items that match the criterion are displayed.

For even more benefits, combine the function with other YAVEON apps, for example, Quality Assurance and Manufacturing.

No. 1	Description	Target Value	Unit of Measure Code	Data Type	Feature Type	Calcul. Feature	Calculation Formula
DETEX	detex		GR/10000M	Decimal	MA001		
F000001	Labeling	OK		Option	MA017		
F000002	Packaging	OK		Option	MA017		
F000003	Certificate	ATTACHED		Option	MA017		
F000004	Shipping Note	ATTACHED		Option	MA017		
F000005	Content of active ingre...	%		Decimal	MA002		
F000006	PH-Value	+7.0		Decimal	MA015		
F000007	Salt Content	4.00	%	Decimal	MA003		
F000008	Methanol	%		Decimal	MA015		
F000009	Optical rotation	0.0		Decimal	MA002		
F000010	Energy kj		KJ	Decimal	MA014		F000011+
F000011	Fat		GR	Decimal	MA009		
F000012	Sugar		GR	Decimal	MA010		
F000013	Ethanol		GR	Decimal	MA015		
F000014	Colour			Option	MA016		
F000015	API YAVIPROFEN		MG	Decimal	MA002		
F000016	Air pressure measur...		BAR	Decimal	MA020		
F000017	Zero Setting		GR	Decimal	MA020		
F000018	10g		GR	Decimal	MA020		
F000019	100g		GR	Decimal	MA020		

ProBatch 365 Base Corporate Design Documents Setup

Actions

General

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

Report Print Details

Print Logo:
 Logo alignment in do...: Right
 Print Return Address:
 Print Footer:
 Footer height - max...: 0
 Doc. No. to Documen...:
 Print Page Transfer S...:
 Remove Empty Lines...:
 Show Labels without...:
 Show Lines with Zero...:

Print Blanket Sales Or...:
 Length of Description: 0
 Print Description 2:
 Print Assembly Comp...:
 Print Tracking Inform...:
 PB365 Extended Texts:
 INSERT EMPTY LINE AFTER LINE TYPE
 Standard texts (Attac...:
 Empty/Comment:
 Item:



THE YAVEON PROBATCH 365 BASE APP

Set up a corporate design for your documents

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

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

To add information, choose which columns and fields to print on the document.

If you don't like the order of the columns, just change them according to your preference.

For even more benefits, extend the function for other YAVEON apps, for example, Trade, Hazardous Substances Management, Warehouse Management, Manufacturing, and Lot Management.

Get an overview with the inventory summary

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

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

For even more benefits, add columns for other YAVEON apps, for example, Lot Management, Warehouse Management, Manufacturing, and Hazardous Substances Management.

Extend the authorization management of Microsoft Dynamics 365 Business Central

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

Traf. Light	Item No.	Item Description	Lot No.	Serial No.	Location Code	Zone Code	Bin Code
●	E1200004	API YAVIPROFEN	LOT000081		BERLIN		
●	E1200004	API YAVIPROFEN	LOT000103		MUNICH	RECEIVE	REC-01
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...
●	E1200005	Instruction Leaflet	LOT000004		MUNICH	RM	RM-02-02-...
●	E1200005	Instruction Leaflet	LOT000018		MUNICH	RM	RM-02-02-...
●	E1200005	Instruction Leaflet	LOT000054		BERLIN		
●	E1200005	Instruction Leaflet	LOT000096		MUNICH	RECEIVE	REC-01
●	E1300000	YAVINIGHT 50ml	2020703		MUNICH	SHELF	SH-01-01-02
●	E1300000	YAVINIGHT 50ml	LOT-0069		MUNICH	PICK	KO-02-08-01
●	E1300000	YAVINIGHT 50ml	LOT-0072		UTRECHT		
●	E1300000	YAVINIGHT 50ml	LOT-0073		BERLIN		
●	E1300000	YAVINIGHT 50ml	LOT-0074		BERLIN		
●	E1300001	YAVI Bears	LOT000021		MUNICH	PICK	KO-02-08-01
●	E1300001	YAVI Bears	LOT000028		UTRECHT		

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

Assigned Role ID ↑	Restrict Permissions	Scope ↑
D365 BASIC	<input type="checkbox"/>	System
D365 SALES DOC. EDIT	<input type="checkbox"/>	System
D365 SALES DOC. POST	<input type="checkbox"/>	System
RM-CONT	<input type="checkbox"/>	System
D365 VENDOR. EDIT	<input checked="" type="checkbox"/>	System

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