



FACT SHEET



Clever Trade Plus

Increases productivity & efficiency during
purchasing & the sales process

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Product Overview

Clever Trade Plus enhances the existing standard trade features within Microsoft Dynamics 365 Business Central and increases productivity and efficiency during purchasing and sales processes.

Benefits

- See item substitutions, variant codes, date of last sale and quantity last ordered for easy upselling and quickly placing customer orders
- Configure blanket order timeframes and connect relevant blanket orders and lines with items to automatically consume the quantity available in stock
- Construct item level restrictions and define items which can be used only for blanket orders
- Set default ship-to-code delivery addresses to ensure orders always arrive at the right address.
- Streamline your document archiving process and only keep what you need
- Use enhanced document number controls to check for duplicates on release of an order and also for duplicated item references on customers, vendors or barcodes
- See a log of all changes made on blanket orders, quotes, orders, return orders, invoices and credit memos.
- Status approvals when new inventory items are added or when existing inventory items have been changed

Requirements

Dynamics 365 Business Central

Want to make upselling easy?

Clever Trade Plus allows you to place customer orders quickly, store re-order exclusions and see re-ordering substitutions.

On the sales order you can now see a reorder list which will show item substitutions, variant codes, date of last sale and quantity last ordered, as well as the ability to input the quantity the customer wants to order. All the product information you need for reordering is now available in one view so there's no need to switch between screens!

Greater control & visibility with blanket orders

Blanket orders are often a customer bugbear but Clever Trade Plus has introduced new features to give users greater visibility and control. You can now easily specify the time frame for blanket orders to be used and utilise the new Auto Consumption feature which will allow for manually added items on Sales or Purchase Orders to automatically connect to the relevant Blanket Order and Line, consuming the quantity available in stock. If item level restrictions are needed you can now define if items are to be used only for blanket orders, restricting other users from being able to select them and holding the needed stock.

Sales item reorder list

No.	Variant Code	Item Description	Substitute for No.	Sales Unit of Measure	Quantity	Unit Price After Line Discount	Last Unit Price After Discount	Qty. Last Ordered (Base)	Date of Last Sale
1900-S		ROME Guest Chair, green		PCS		125.10	125.10	5.00	19/03/2023
1972-S		MUNICH Seinel Chair, yellow		PCS		123.30	123.30	3.00	23/03/2023
1996-S		ATLANTA Whiteboard, base		PCS		906.70	906.70	12.00	02/04/2023
1965-W		Conference Bundle 2-8		PCS		151.70	151.70	1.00	15/02/2023
1953-W		Guest Section 1		PCS		81.60	81.60	23.00	05/02/2023
1000		Lot management item		PCS		0.00	5.00	1.00	01/05/2023
4000D		Catchweight item		KG		0.00	0.03	800.00	01/05/2023
1900-S		PARIS Guest Chair, black		PCS		125.10	2,900.00	1.00	05/10/2023
1906		Serial No Item		PCS		0.00			
1005		Quality Lot Tracked Item		PCS		0.00			
1900-S		PARIS Guest Chair, black	1014	PCS		0.00			
1896-S	1	ATHENS Desk		PCS		649.40			
1906-S	GREEN	ATHENS Mobile Pedestal		PCS		281.40			

Autoconsumption being used on a PO

Type	No.	Description	Blanket Order No.	Blanket Order Line No.	Quantity	Unit of Measure Code	Location Code	Direct Unit Cost Excl. VAT	Line Amount Excl. VAT	Qty. to Receive
Item	1900-S	PARIS Guest Chair, black	1001	20000	6	PCS		5.00	30.00	6

Blanket Order

Blanket Order No. 1001

Blanket Order Line No. 20000

Item No. 1900-S

Available Qty. (Base) 2.00

Blanket From Date -

Blanket To Date -

No. of Blanket Orders 3



Never ship to the wrong address again!

Clever Trade Plus contains a new mandatory ship-to-code field to ensure that the right delivery address is selected every time for sales orders. Just set a default delivery address and sleep easy knowing that once set, the order will always turn up at the right address – no nasty surprises!



Tired of how many versions of documents are lingering in your Business Central system?

Are these multiple versions using up space within your system?

At the moment you will currently get an archived version saved every time documents are re-opened. Clever Trade Plus streamlines the archiving process, ensuring that only the most relevant copies are kept. Using this feature, your sales and purchase orders are automatically archived when the document is released, limiting the number of archive versions and space used. It's also possible to retain invoiced sales or purchases and return orders using Clever Trade Plus, just select the documents you want to keep visible.

Sales Invoice

102229 · Adatum Corporation

Home Prepare Print/Send Approve Request Approve

Post Release

General

View - Sales List

Search Show Document More options

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No. ↓	Location Code	Assigned User ID	Document Date
101095	10000	Adatum Corporation	665			05/10/2023

Do you want to get paid quicker?

Enhanced document number controls could help with that!

We have taken the standard functionality of Business Central which checks to see if an external document reference already exists when posting a document and enhanced it – now you check for duplicates earlier in the process, at release of an order. Should a duplicated code be entered on sales orders, sales invoices or posted sales invoice, a notification will appear letting you know as well as showing you the existing documents it features on. By entering a unique customer reference code there's less invoice admin for the customer, meaning you get your money quicker - win-win!

Similar functionality also allows you to prohibit the use of duplicated item references for customer, vendor or barcodes. If you're happy to use duplicated item references that's fine too, just switch this on and away you go!

Entry No. 4	Entry DateTime	Document Type	User ID	Document No.	Line No.	Sell-to Customer No.	Type	No.	Old Quantity	New Quantity	Net Change Quantity	Old Line Amount	New Line Amount	Net Change Line Amount	Ship-to Code	Shipment Method Code
29	04/10/2023 16:03	Order	ADMIN	101095	10000	10000	Item	1900-S	0.00	5.00	5.00	0.00	625.50	625.50	LONDON	CFR
28	04/10/2023 16:03	Order	ADMIN	101095	10000	10000	Item	1900-S	5.00	0.00	-5.00	625.50	0.00	-625.50	LONDON	CFR
27	04/10/2023 15:58	Quote	ADMIN	1006	10000	10000	Item	1896-S	0.00	7.00	7.00	0.00	350.00	350.00		
26	04/10/2023 15:58	Quote	ADMIN	1006	10000	10000	Item	1896-S	7.00	0.00	-7.00	4,545.80	0.00	-4,545.80		
25	04/10/2023 15:58	Quote	ADMIN	1006	10000	10000	Item	1896-S	0.00	7.00	7.00	0.00	4,545.80	4,545.80		
24	04/10/2023 15:58	Quote	ADMIN	1006	10000	10000	Item	1896-S	0.00	0.00	0.00	0.00	0.00	0.00		
23	04/10/2023 15:58	Quote	ADMIN	1006	10000	10000	Item	1896-S	0.00	0.00	0.00	0.00	0.00	0.00		
22	04/10/2023 15:57	Return Order	ADMIN	1004	10000	10000	Item	1896-S	0.00	-2.00	-2.00	0.00	-1,298.80	-1,298.80		

Greater visibility of changes & item statuses

As you will already know keeping a close eye on sales and purchase orders is vital to businesses, so we have introduced two features in Clever Trade Plus which will make this a breeze. Missed amendments causing problems when it comes to the dreaded audit? Now you will see a log of all changes made on blanket orders, quotes, orders, return orders, invoices or credit memos. You can now also see enhanced statuses of items. When new inventory items have been added or the status of an existing item has been changed, approval will need to be given – always making sure that the right status is attached to the right item as wrong statuses could result in sales or purchases being blocked.



Item Status						✓ Saved	🔖	📄	↗
Code ↑	Description	Blocked	Sales Blocked	Purchasing Blocked					
→ APPROVED	Approval granted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
DISC	Discontinued	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					
NEW	New - Requires approval	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					

Item status table



This app collection really is jam-packed with everything you need to receive inventory and take orders efficiently, as well as giving you greater visibility and all the data you need at your fingertips.



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