

# YAVEON

## ProBatch 365 Trade

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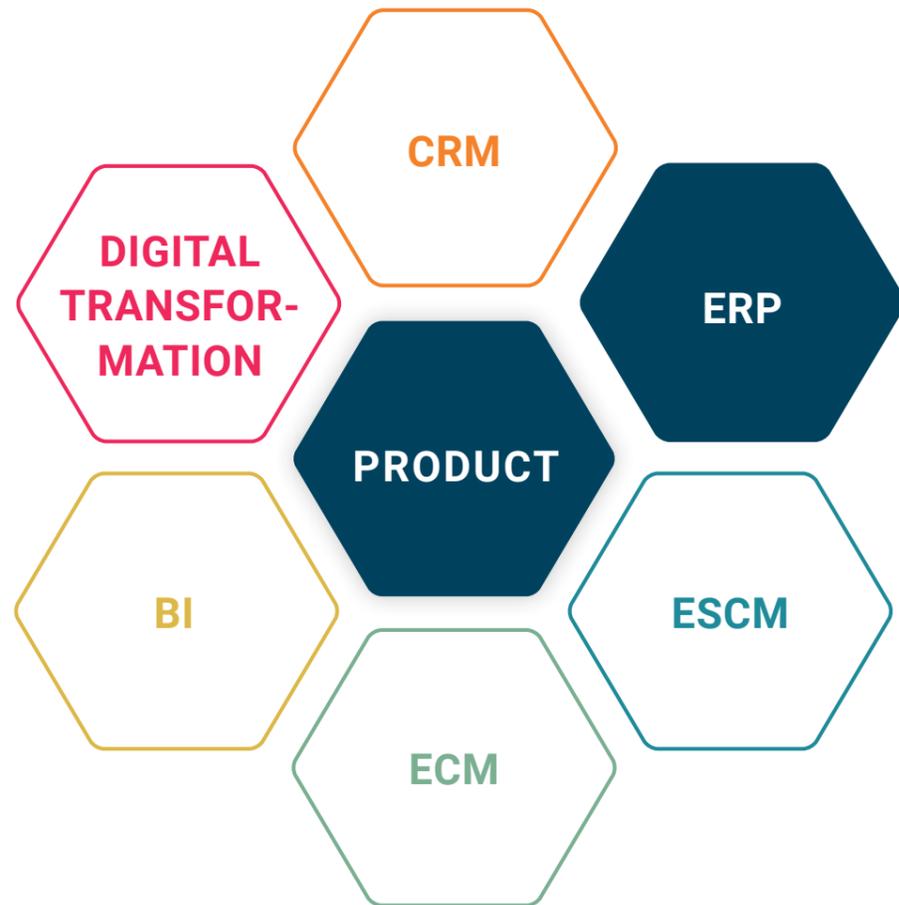
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Microsoft  
Partner



## EVERYTHING AT A GLANCE



### BASIS

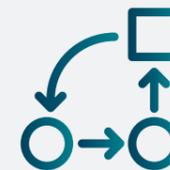
Microsoft Dynamics 365 Business Central

### COMPANY SIZE

Small and medium-sized companies

### INDUSTRIES

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



### HIERARCHICAL PRICING, MULTI-LEVEL DISCOUNTS

Hierarchical Pricing and Multi-Level Discounts make it possible to map the complex contract terms of the retail industry in Business Central. The prices you negotiated with your customers are inserted in the sales document - not the lowest price.



### CUSTOMER HIERARCHIES AND LISTINGS

Multi-level structures of chain stores and purchasing associations can be mapped with the help of customer hierarchies. For each hierarchy level, prices and discounts can be defined, and article assortments can be listed.



### COMMISSION / BONUS ACCOUNTING

It is easy to calculate and record retroactive rebates when customers reach revenue or sales targets in a specific period. It is also possible to settle and post sales commissions.

# HOW DOES THIS WORK EXACTLY? THE FEATURES

## Simplify your work with customer hierarchies

Classification made easy: To classify customers, set up customer hierarchies. You can do this, for example, by categorizing purchasing associations and chain stores or by mapping the business units of a corporate group. If required, you can also create these outlines in multiple levels: For example, you could combine the chain store branches in individual regions on one hierarchical level. You can assign regional units to a national level, which you then, in turn, assign to a continent level with other countries.

Individual customers can be assigned to each organizational unit. Conditions, such as prices and discounts, can be set up for each organization. These conditions are valid for all customers in this organizational unit as well as for the assigned level below. This also applies to listings and assortments, where you can define exceptions in lower levels.

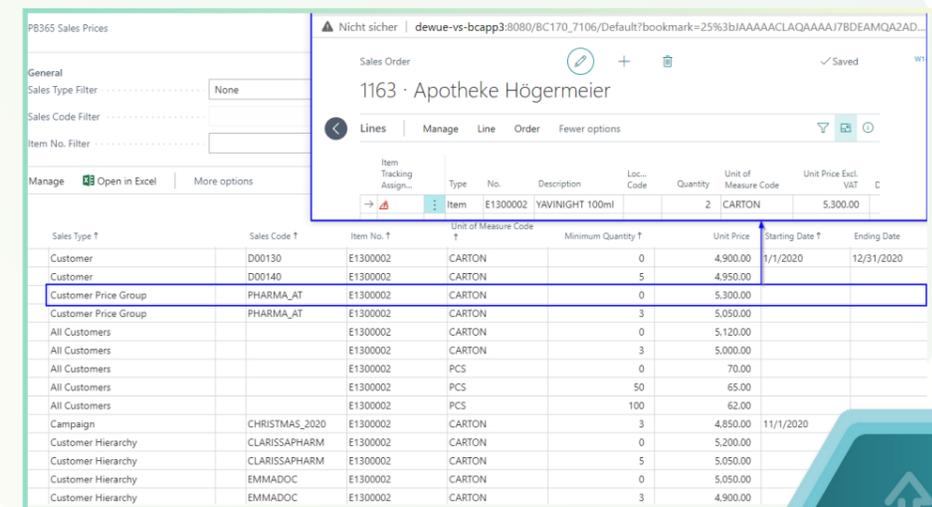
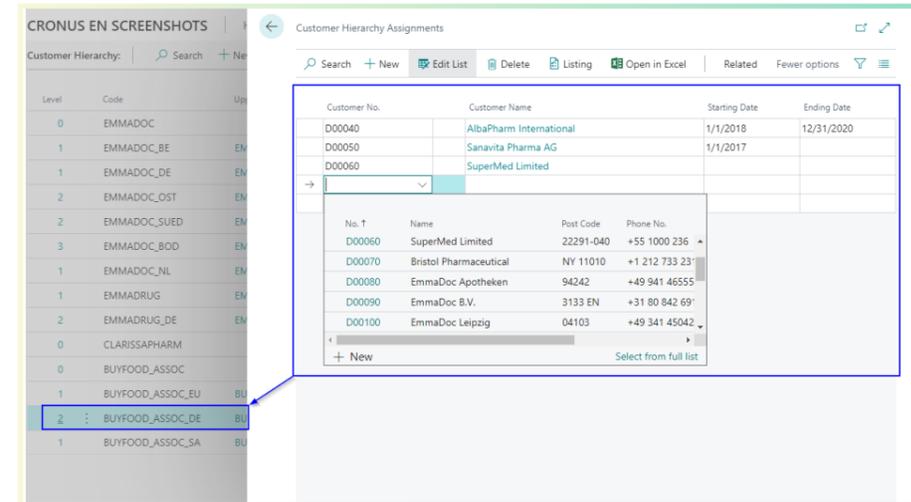
You can also define lot data such as lot number, status, expiration date or lot features that will be passed on from the component to the finished product during production.

## Accurate Prices with Hierarchical Pricing

With Hierarchical Pricing, you determine sales prices and master data across multiple levels. The system goes one step further: Contrary to the standard pricing of Microsoft Dynamics 365 Business Central, Hierarchical Pricing does not find the lowest price for an item but the exact price that was negotiated for the customer. From the most specific setup to the most general: Their determination of sales prices is along the following sequence: Campaign, Customer, Customer price group, Customer hierarchy, All customers, Sales price on the item card. As soon as a price is found in the sequence, this price is automatically used. This way, you ensure the price agreed with your customer is always used - even if the price on the item card is lower.

## Simpler processing of rebates in kind

Manage in-kind rebates: An in-kind rebate is not a cash rebate but the delivery of additional goods free of charge, whether further quantities of the same goods or a different item.



# HOW DOES THIS WORK EXACTLY? THE FEATURES

Bonus Rates

General  
 Recipient of Bonus Filter: [Dropdown] Code Filter: [Dropdown]  
 Type Filter: None Validity Period Filter: [Dropdown]

Manage  Open in Excel

Recipient of Bonus	Type	Code	Bonus Reference	Bonus Reference Limit	Bonus Type	Rate	Validity Period	Valid from	Valid to	Completed
D00040	All Items		Turnover	30,000.00	%	1.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00040	All Items		Turnover	40,000.00	%	1.50	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00080	Item Group	PHARMA	Turnover	5,000.00	%	2.00	2020_Q3	7/1/2020	9/30/2020	<input type="checkbox"/>
D00080	Item Group	PHARMA	Turnover	5,000.00	%	2.00	2020_Q4	10/1/2020	12/31/2020	<input type="checkbox"/>
D00080	Item Group	PHARMA	Turnover	10,000.00	%	1.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00080	Item Group	PHARMA	Turnover	20,000.00	%	2.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00080	Item Group	PHARMA	Turnover	40,000.00	%	5.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00150	Item	E1300002	Sales Quantity	800.00	Fixed Amount per Unit	0.10	2020_H2	7/1/2020	12/31/2020	<input type="checkbox"/>
D00160	Item	E1300002	Sales Quantity	800.00	Fixed Amount	80.00	2020_H2	7/1/2020	12/31/2020	<input type="checkbox"/>
D00130	Item Group	PHARMA	Turnover	10,000.00	%	1.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00130	Item Group	PHARMA	Turnover	20,000.00	%	2.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00130	Item Group	PROMO	Sales Quantity	100,000.00	Fixed Amount	3,000.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>
D00130	Item Group	PROMO	Sales Quantity	150,000.00	Fixed Amount	5,000.00	2021	1/1/2021	12/31/2021	<input type="checkbox"/>

Sales Order 1123 · SuperMed Lim

Process Release Posting Prepara

General

Lines

Item Tracking Assign...	Type	No.	Description	Code	Quantity	Measure Code	VAT	Discount %	Excl. VAT	Main Recipient	Qty. to Ship	Shipped	Qty.
→	Item	E1000001	YAVIPROFEN N1 ...	MUNL...	3,000	PCS	9.00		27,000.00	0.00			
→	Item	E1000002	YAVIPROFEN N2 ...	MUNL...	4,000	PCS	17.00		68,000.00	0.00			
→	Item	E1000003	YAVIPROFEN N3 ...	MUNL...	2,000	PCS	32.00		64,000.00	0.00			

Subtotal Excl. VAT (EUR) ..... 159,000.00 Total Excl. VAT (EUR) ..... 151,145.40  
 Inv. Discount Amount Excl. VAT (EUR) ..... 7,854.60 Total VAT (EUR) ..... 0.00  
 Invoice Discount % ..... 4.94 Total Incl. VAT (EUR) ..... 151,145.40

Invoice Details

Edit - Invoice Discount Details

Template Code	Description	Service Charge	Discount %	Calculation Basis	Base Value	Discount Value	New Value
DI04	Invoice Discount	0.00	3.00	Original Val...	159,000.00	4,770.00	154,230.00
DI02	Association Discount	0.00	2.00	Discounted ...	154,230.00	3,084.60	151,145.40

Commission Calculation CC00017

Issue and Create Purchase Invoice Create Commission Calculations Suggest Commission Calc. Lines Issue Issue and Print Recipient of Commission

General

No. CC00017 Address 2  
 Recipient of Commission No. P000003 Post Code 10117  
 Recipient Type Vendor City Berlin  
 Recipient No. K00100 Posting Date 1/15/2021  
 Name Maria Espinoza Document Date 1/15/2021  
 Name 2 Address Werderscher Markt 17 Calculation from 1/1/2020 Calculation to 12/31/2020

Lines

Document Type	Docum. No.	Self-to Custom. No.	Item No.	Item Description	Posting Date	Document Date	Quan.	Unit of Measure Code	Line Amount (EUR)	Commission Amount (EUR)	Commission Amount (EUR)
→ Posted Invoice	103057		D00170	E1300000 YAV/NIGHT 50ml	11/4/2020	12/1/2020	2	CARTON	9,118.00	8,935.64	268.07
→ Posted Invoice	103052		D00180	E1300000 YAV/NIGHT 50ml	11/15/2020	11/15/2020	2	CARTON	9,118.00	8,935.64	268.07

## More options with multi-level line and invoice discounts

Set up discounts at line discount and invoice discount level - and even multi-level. You can define the sequence of stages. The second and further discount lines can use the original or the discounted value of the previous line as a base. The determination of discounts follows the same hierarchical principle as the determination of the price: from the most specific setup to the most general.

## Fair bonuses thanks to bonus settlement

Has your customer reached a defined revenue or sales target in a set period? With bonus calculation, you can provide a subsequent rebate based on sales volume or revenue. Invoices, credit notes, line discounts, and invoice discounts are taken into account in the calculation. You can choose either the actual customer or another customer as a bonus recipient.

## Automatic calculation of surcharges and discounts

Do you find that inserting and calculating markups and markdowns in the sales order is time-consuming? Automate it based on the total amount. If required, you can also extend the functionality to include the delivery condition, for example, to map the insertion of freight surcharges.

## Accurate payments with commission settlement

Commissions for sales representatives, sales agencies, or customers - you can calculate and post all these with the commission settlement. It is possible to determine commissions based on both quantities and revenue. Commissions can be set up as a percentage, per item-unit, or fixed amount and incorporated in a scale.

# 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	Calcu... 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

**General**

Default Language: ENG

Default Date Format: 304

Example for default d.: 19. May 2021

No copy Data run:

Line No divisor for POS:

Proforma Invoice No.: Order No

**Report Print Details**

Print Logo:

Logo alignment in do...: Right

Print Return Address:

Print Footer:

Footer height - maxi...: 0

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 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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