

# Sales Order Export to Excel



**solutioo**

**Info Brochure**

**English Version**

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WEB TECHNOLOGIES

## Revolutionize Your Sales Data Management

Are you tired of the hassle involved in exporting and mapping sales data manually? Our Sales Order Export App is here to simplify your workflow. Designed for Microsoft Dynamics 365 Business Central, this app makes exporting sales data to Excel quick and effortless.

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### Why Use Our App?

#### Efficient Data Management

No more tedious manual exports. Our app automates the process, saving you valuable time and reducing the risk of errors.

#### Flexible Templates

Customize your data exports with templates that can be tailored to meet your specific business needs.

#### Boosted Productivity

Spend less time handling data and more time making strategic decisions with our user-friendly and efficient export tool.

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### Key Features

#### Seamless Data Export

- Easily export sales order data from Microsoft Dynamics 365 Business Central to Excel.

Export Filter  ...

Template  ...

Export File Name

Field Name	Export
Document Type	<input type="checkbox"/>
Sell-to Customer No.	<input type="checkbox"/>
No.	<input type="checkbox"/>
Bill-to Customer No.	<input type="checkbox"/>
Bill-to Name	<input type="checkbox"/>
Bill-to Name 2	<input type="checkbox"/>
Bill-to Address	<input type="checkbox"/>
Bill-to Address 2	<input type="checkbox"/>
Bill-to City	<input type="checkbox"/>
Bill-to Contact	<input type="checkbox"/>
Your Reference	<input type="checkbox"/>
Ship-to Code	<input type="checkbox"/>
Ship-to Name	<input type="checkbox"/>
Ship-to Name 2	<input type="checkbox"/>
Ship-to Address	<input type="checkbox"/>
Ship-to Address 2	<input type="checkbox"/>

## Custom Template Creation

- Create and manage templates to define how your data is exported.
- Specify which fields to include and how they should be mapped.



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## General

ID .....	1	Export File Name .....	ExampleSalesOrderExport
Description .....	Template Card for Sales Orders	Export Type .....	SALES ORDER ...

## Export Templates Fields



New Line



Delete Line



	Field No. ↑	Field Name	Export
	1	Document Type	<input type="checkbox"/>
	2	Sell-to Customer No.	<input checked="" type="checkbox"/>
	3	No.	<input checked="" type="checkbox"/>
	4	Bill-to Customer No.	<input checked="" type="checkbox"/>
	5	Bill-to Name	<input type="checkbox"/>
	6	Bill-to Name 2	<input type="checkbox"/>
	7	Bill-to Address	<input checked="" type="checkbox"/>
	8	Bill-to Address 2	<input type="checkbox"/>
	9	Bill-to City	<input checked="" type="checkbox"/>
	10	Bill-to Contact	<input type="checkbox"/>
	11	Your Reference	<input checked="" type="checkbox"/>
	12	Ship-to Code	<input type="checkbox"/>
	13	Ship-to Name	<input checked="" type="checkbox"/>
	14	Ship-to Name 2	<input checked="" type="checkbox"/>
	15	Ship-to Address	<input checked="" type="checkbox"/>
	16	Ship-to Address 2	<input checked="" type="checkbox"/>
	17	Ship-to City	<input checked="" type="checkbox"/>
	18	Ship-to Contact	<input checked="" type="checkbox"/>
	19	Order Date	<input checked="" type="checkbox"/>
→	20	⋮	<input checked="" type="checkbox"/>

## Personalized Export Settings

- Customize export file names and select specific fields for export.
- Filter data based on criteria such as creation date to ensure you get exactly what you need.

Field Name		Export
Document Type		<input checked="" type="checkbox"/>
Sell-to Customer No.		<input type="checkbox"/>
No.		<input checked="" type="checkbox"/>
Bill-to Customer No.		<input type="checkbox"/>
Bill-to Name		<input checked="" type="checkbox"/>
Bill-to Name 2		<input type="checkbox"/>
Bill-to Address		<input checked="" type="checkbox"/>
→ Bill-to Address 2	⋮	<input checked="" type="checkbox"/>
Bill-to City		<input checked="" type="checkbox"/>

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## Who Will Benefit?

Our app is perfect for small to medium-sized businesses that rely on Microsoft Dynamics 365 Business Central and need a more efficient way to handle sales data exports.

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## What Sets Us Apart?

Our Sales Data Export App is not just about exporting data; it's about doing it in a way that is easy, customizable, and reliable. The app's intuitive interface, robust customization options, and ability to handle complex export tasks ensure it stands out from the competition.

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## Getting Started: A Step-by-Step Guide

### Step 1: Accessing the Export Function

Navigate to the Sales Orders section in Microsoft Dynamics 365 Business Central. You can find it under Sales.



Customers		Item Charges	Sales Orders	Sales Invoices	Sales Return Orders	Finance Charge Memos	Posted Sales Credit Memos	Posted Sales Shipments	Issued Finance Charge Memos			
Items	Sales Quotes	Blanket Sales Orders	Sales Credit Memos	Reminders	Posted Sales Invoices	Posted Sales Return Receipts	Posted Sales Reminders					
No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Document Date	Status	Comple... Shipped	Amount Shipped Not Invoiced (LCY)	Invoiced (LCY) Incl. VAT	Amount	Amount Including VAT
101001	10000	Adatum Corporation				02.04.2024	Open	No	0,00	0,00	16.851,60	20.053,40
101002	10000	Adatum Corporation				01.05.2024	Open	No	0,00	0,00	2.296,40	2.732,72
101003	30000	School of Fine Art				22.04.2024	Open	No	0,00	0,00	5.208,80	5.208,80
101004	40000	Alpine Ski House				13.05.2024	Open	No	0,00	0,00	573,00	573,00
101005	10000	Adatum Corporation	Y-3	GELB		01.06.2023	Open	No	0,00	0,00	150,00	178,50
101006	10000	Adatum Corporation	Y-4	GELB		01.06.2023	Open	No	0,00	0,00	600,00	714,00
101007	10000	Adatum Corporation	Y-5	GELB		01.06.2023	Open	No	0,00	0,00	450,00	535,50
101008	10000	Adatum Corporation	W-1	WEISS		01.06.2023	Open	No	0,00	0,00	60,00	71,40
101009	10000	Adatum Corporation	SVC-1	HAUPT		01.06.2023	Open	No	0,00	0,00	2.400,00	2.856,00

## Step 2: Setting Up a Template

1. Once on the Sales Orders Page, go to the Actions section.
2. Click on 'Open Excel Mapping'.

3. Press on the three dots right of the field "Template
4. Use the Action "New" on the "Export Templates List" page.
5. Fill your templates data, such as file name, description and the export type (currently only Sales Order is available), the ID will update automatically, once the card has been saved.

Export Template Card

✓ Saved

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**General**

ID ..... 1

Description ..... Template Card for Sales Orders

Export File Name ..... ExampleSalesOrderExport

Export Type ..... SALES ORDER ...



**Export Templates Fields**    New Line    Delete Line   

Field No. ↑	Field Name	Export
1	Document Type	<input type="checkbox"/>
2	Sell-to Customer No.	<input checked="" type="checkbox"/>
3	No.	<input checked="" type="checkbox"/>
4	Bill-to Customer No.	<input checked="" type="checkbox"/>
5	Bill-to Name	<input type="checkbox"/>
6	Bill-to Name 2	<input type="checkbox"/>
7	Bill-to Address	<input checked="" type="checkbox"/>
8	Bill-to Address 2	<input type="checkbox"/>
9	Bill-to City	<input checked="" type="checkbox"/>
10	Bill-to Contact	<input type="checkbox"/>
11	Your Reference	<input checked="" type="checkbox"/>
12	Ship-to Code	<input type="checkbox"/>
13	Ship-to Name	<input checked="" type="checkbox"/>
14	Ship-to Name 2	<input checked="" type="checkbox"/>
15	Ship-to Address	<input checked="" type="checkbox"/>
16	Ship-to Address 2	<input checked="" type="checkbox"/>
17	Ship-to City	<input checked="" type="checkbox"/>
18	Ship-to Contact	<input checked="" type="checkbox"/>
19	Order Date	<input checked="" type="checkbox"/>
→	20  Posting Date	<input checked="" type="checkbox"/>




### Step 3: Exporting Your Data




1. Back on the Sales Order Export Page, select the sales orders you wish to export. If you want to export all, leave this field empty.

2. Choose the appropriate template.
3. Click on 'Export to Excel'. The sheet will be generated, and a download should start.

Sales Order Export ✓ Saved  

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   | 
 + New Edit List Delete Export to Excel

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Export Filter ...

Template 1 ...

Export File Name ExampleSalesOrderExport

Field Name	Export
Customer Price Group	<input checked="" type="checkbox"/>
Prices Including VAT	<input checked="" type="checkbox"/>
Invoice Disc. Code	<input checked="" type="checkbox"/>
Customer Disc. Group	<input checked="" type="checkbox"/>
Language Code	<input checked="" type="checkbox"/>
Format Region	<input checked="" type="checkbox"/>
Salesperson Code	<input checked="" type="checkbox"/>
Order Class	<input checked="" type="checkbox"/>
Comment	<input checked="" type="checkbox"/>
No. Printed	<input checked="" type="checkbox"/>
On Hold	<input checked="" type="checkbox"/>
Applies-to Doc. Type	<input checked="" type="checkbox"/>
Applies-to Doc. No.	<input checked="" type="checkbox"/>
Bal. Account No.	<input checked="" type="checkbox"/>
Recalculate Invoice Disc.	<input checked="" type="checkbox"/>

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## Experience the Difference Today

Transform your sales data management with our powerful, user-friendly app. Get it now and see how it can make your data handling processes more efficient and error-free.

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For more information, visit our [website](#), contact our support team at [Jonah.schreiber@solutiono.de](mailto:Jonah.schreiber@solutiono.de) or [book a meeting with our support](#).