Sales Assist Add-on for Microsoft Dynamics 365 Business Central

1. Introduction

Sales Assist is an add-on for Microsoft Dynamics 365 Business Central designed to streamline and standardize the process of adding related sales lines to sales documents. It allows users to define *Sales Assist Groups* that bundle together items, resources, charges, and other entities, which can then be added to sales documents in a controlled and consistent way.

This add-on is especially useful for scenarios such as:

- Selling product bundles or kits
- Adding mandatory or optional related services
- Automatically including charges or additional lines
- Reducing manual entry errors and setup time

2. Key Concepts

2.1 Sales Assist Group (Header)

A **Sales Assist Group** is the header record that represents a logical grouping of related entities. This group is assigned to either an **Item** or a **Resource** in Business Central.

Once assigned, the group determines which related lines can be added to a sales document when that item or resource is used as a sales line.

2.2 Sales Assist Group Lines (Lines)

Sales Assist Group Lines define the individual entities that form part of a Sales Assist Group.

Each line represents a potential related sales line that can be added to a sales document.

Supported Line Types

Sales Assist Group Lines support the following types:

- Item
- Item Charge
- Resource
- G/L Account
- Fixed Asset
- Allocation Account

Each type behaves according to the same business rules as when it is manually added to a sales line in standard Business Central.

3. Sales Assist Group Line Configuration

3.1 Type and No.

- **Type** determines the entity type (Item, Resource, G/L Account, etc.).
- **No.** represents the related entity record (for example, a specific Item or Resource).

The **No.** lookup is filtered based on the selected type and only shows entities that are valid for use on sales lines, following standard Business Central rules.

3.2 Currency Code

- The **Currency Code** determines whether a Sales Assist Group Line is available for selection on a sales document.
- Only lines matching the currency of the sales document (or blank currency, if applicable) will be available.

This allows different pricing or related items to be configured per currency.

3.3 Default Quantity and Unit Price

Sales Assist Group Lines may optionally define:

- **Default Quantity**
- **Default Unit Price**

These values control how the related sales line is created:

- If a default value **is populated**, it will overwrite the value that would normally be assigned by Business Central when the sales line is created.
- If a default value **is not populated**, the standard default behaviour of the sales line will be used instead.

3.4 Include by Default

- The **Include by Default** flag determines whether a line is automatically included when related items are added.
- When enabled, the line will be pre-selected when the user opens the related items selection list from a sales line.

Users can still manually include or exclude lines before confirming.

3.5 Priority

- The **Priority** field determines the order in which a line is created as a sales line.
- Use **"Move Up"** or **"Move Down"** to increase or decrease Priority.
- The order of creation of sales lines (lower number = higher priority).

3.6 Optional Defaults

All default values on Sales Assist Group Lines are **optional**.

If no defaults are specified:

- Quantity, price, and other values will be derived from standard Business Central logic when the sales line is created.

If defaults are specified:

- The created sales line will use the configured values from the Sales Assist Group Line instead.

4. Assigning a Sales Assist Group

A Sales Assist Group is assigned on:

- **Item Card**, or
- **Resource Card**

Once assigned, the group becomes active for sales lines using that item or resource.

5. Adding Related Items to Sales Documents

5.1 Supported Sales Documents

Related items can only be added on the following sales documents:

- Sales Quotes
- Sales Orders
- Sales Invoices

5.2 Add Related Items Action

To add related items:

1. Open a supported sales document.
2. Select a sales line that uses an Item or Resource configured with a Sales Assist Group.
3. On the **Sales Lines**, open the **Sales Assist** menu.
4. Choose **Add Related Items**.

A list of available Sales Assist Group Lines will be displayed, filtered by:

- Assigned Sales Assist Group
- Currency Code
- Validity rules based on line type

5.3 Creating Sales Lines

When confirmed:

- Selected related items are added as new sales lines.
- Default values from the Sales Assist Group Lines are applied if configured.
- Otherwise, standard Business Central defaults are used.

6. Special Handling: Item Charges

Item Charge lines require additional action after being added.

- Item Charges must be allocated to existing sales lines.
- This follows standard Business Central item charge allocation functionality.

Sales Assist does not change or bypass standard allocation requirements.

7. Posting Setup Requirements

Before adding any entity to a Sales Assist Group Line, ensure that:

- All required **posting groups** are correctly configured.
- The entity can be successfully posted when added manually to a sales line.

Failure to configure posting groups correctly may result in errors when adding related items to sales documents.

8. Managing Related Lines

8.1 Manual Removal

- Added related sales lines can be removed manually at any time, using standard sales line deletion.

8.2 Removing Master Lines

When a **master sales line** (the line that triggered the addition of related items) is deleted:

- The user is prompted with an option to also remove the related lines.
- The user may choose whether or not to delete the related lines.

This provides flexibility while maintaining control over linked sales lines.

9. Summary

Sales Assist enhances sales document creation by:

- Standardizing the addition of related sales lines
- Reducing manual entry and setup errors
- Supporting flexible pricing and currency scenarios
- Respecting standard Business Central business rules and posting logic

By leveraging Sales Assist Groups and Group Lines, organizations can significantly improve consistency, accuracy, and efficiency in their sales processes.

10. Version Information

Detail	Information
Add-on Name	Sales Assist
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