

USER GUIDE

AL Combine Shipments

CSH

AL Combine Shipments combines multiple posted sales shipments into a single sales invoice, grouped by the criteria you configure.



AL Combine Shipments combines multiple posted sales shipments into a single sales invoice, grouped by the criteria you configure. Standard Business Central always groups by the same fixed keys; with AL Combine Shipments you decide which shipment fields must match for two shipments to land on the same invoice, with no development needed.

1. Concepts in one minute

- A **combine shipment code** is a named set of grouping fields. Two posted shipments end up on the same invoice when ALL the fields of the code match.
- The **setup lines** are the catalogue of shipment fields available for grouping. The **Mandatory** lines always apply; a code adds its own fields on top of them.
- The code is assigned on the **Customer** card, travels to the sales order and to the posted shipment, and stays editable on both.
- The **Combine Shipments (CSH)** report reads the posted shipments of a period and creates one invoice per distinct combination of the grouping values, as drafts or posted.
- On the combined invoice the customer master data has the final word: revalidated fields such as payment terms come from the customer card, not from the order.

2. Prerequisites

- Microsoft Dynamics 365 Business Central version 28.0 or later, Cloud (SaaS).
- Languages available: en-US and it-IT.
- The app installs together with its AppLibra dependencies: **AL Message Passing**, **AL Role Center** and **AL License and Trial Management**.
- Licensing: creating the setup record starts a one-month trial. The report checks the license at the start of every run; after the trial expires the run stops at the license check until a license is in place.
- Permissions: assign **ALPCS-USER** (AL Combine Shipments - User) to operators who run the combine, and **ALPCS-ADMIN** (AL Combine Shipments - Administrator) to whoever maintains the setup and the codes. ALPCS-ADMIN includes everything in ALPCS-USER.

An operator with only **ALPCS-USER** who opens the setup gets a standard Business Central permission error: that is expected, the setup requires **ALPCS-ADMIN**.

3. Setup

Search **Combine Shipment Setup (CSH)** in Tell Me, or start from the guided setup lists: in Assisted Setup the app appears as "Set up AL Combine Shipments", in Manual Setup as "Combine Shipment Setup (CSH)". The wizard **AL Combine Shipments Assisted Setup (CSH)** walks you through Welcome, Introduction and

the Terms of Use (confirm **I understand and accept these terms.**); in its setup step, choose **Add Suggested Fields** to create the default combine shipment code and the suggested setup fields.

The setup has two parts:

- The header, with **Def. Combine Shipment No.** (the code used for customers that have no code of their own) and **Assisted Setup Completed**.
- The **Combine Shipment Setup Lines (CSH)**: the catalogue of posted shipment fields available for grouping. Each line has **Mandatory**, **Sequence**, **Field Name**, **Sales Inv. Field Name** (the invoice header field that receives the value) and **Validate Invoice Header Field** (whether the value is validated on the invoice header or just assigned).

Add Suggested Fields (an action of the wizard's setup step) fills the catalogue with the suggested starting point: Bill-to Customer No., Sell-to Customer No., Ship-to Code, Customer Price Group and VAT Bus. Posting Group. It is a modifiable starting point: you can add any sales header field, and the mapping is validated against the real tables, so a grouping field must exist both on the posted shipment and on the sales invoice header.

Sequence ↑	Field Name	Sales Inv. Field Name	Mandatory	Validate Invoice Header Field
→ 10	Bill-to Customer No.	Bill-to Customer No.	✓	✓
20	Sell-to Customer No.	Sell-to Customer No.	✓	✓
30	Ship-to Code	Ship-to Code	✓	✓
40	Customer Price Group	Customer Price Group	✓	✓
50	VAT Bus. Posting Group	VAT Bus. Posting Group	✓	✓

The setup lines catalogue with the suggested fields, all mandatory and validated.

Sequence rule: the report validates the fields on the invoice header in **Sequence** order, and the mandatory customer fields come first (sequences 10-30). Give the fields of your codes a **Sequence** AFTER all the mandatory setup lines, for example 100 and up. A code field placed at or below the mandatory sequences still splits the invoices correctly, but its value gets overwritten on the invoice header by the customer defaults.

4. Combine shipment codes

Open **Combine Shipment List (CSH)** to see the codes and **Combine Shipment Card (CSH)** to edit one. A code has **No.**, **Description** and **Status**, plus its lines: the grouping fields picked from the non-mandatory part of the setup catalogue, each with **Sequence**, **Field Name**, **Sales Inv. Field Name** and **Validate Invoice Header Field**.

The screenshot shows the 'Combine Shipment List (CSH)' page in Dynamics 365 Business Central. The page has a header bar with the Dynamics 365 Business Central logo and environment information (bc28-w1). Below the header, there's a navigation bar with a back arrow, a search icon, and a '+ New' button. The main content area displays a table with three columns: 'No.', 'Description', and 'Status'. The table contains two rows: 'STANDARD' with status 'Certified' and 'LOCATION' with status 'Open'.

No. ↑	Description	Status
STANDARD	One invoice per customer, split by location and shipment method	Certified
LOCATION	Split by location only	Open

The code list: STANDARD is Certified, LOCATION is still Open.

At run time the report always applies the **Mandatory** catalogue lines and adds the lines of the customer's code. Two shipments are combined on the same invoice only when all these fields match; the matched values are carried to the invoice header, assigned or validated according to the line setting. Customers without a code of their own fall back to **Def. Combine Shipment No.** from the setup.

Combine Shipment Card (CSH)

STANDARD

General

No. STANDARD Status Certified

Description One invoice per customer, split by location at

Sequence ↑	Field Name	Sales Inv. Field Name	Validate Invoice Header Field
100	Location Code	Location Code	☐
110	Shipment Method Code	Shipment Method Code	☐

The STANDARD code: Certified, with Location Code and Shipment Method Code at sequences 100 and 110.

Bring a code to **Status** = Certified when its field list is final: certifying validates the mapping of the lines and locks them against further changes. Make it part of your procedure before handing the code to operations: the run itself does not check the status.

5. Daily use

5.1 Customer, order, posted shipment

Assign the code in **Combine Shipment No.** on the **Customer** card, at the bottom of the Invoicing FastTab: it is the only field the run reads to group a customer's shipments (the standard **Combine Shipments** toggle belongs to standard combined invoicing and is not read by the app). When you create a sales order the code is copied from the customer (both when the sell-to customer is entered and when the bill-to customer changes, falling back to the setup default), and it stays editable on the order, in the Shipping and Billing FastTab (use **Show more** if hidden).

Shipping and Billing Show less

Ship-to	Default (Sell-to Address)	Location Code	
Phone No.		Shipment Date	01/08/2026
Contact	Robert Townes	Shipping Advice	Partial
Shipment Method		Outbound Whse. Handling Time	
Code		Shipping Time	
Agent		Late Order Shipping	No
Agent Service		Combine Shipments	☒
Package Tracking No.		Completely Shipped	No
Combine Shipment No.	STANDARD	Transportation By	
Bill-to	Default (Customer)	Shipment Time	

A sales order with Combine Shipment No. inherited from the customer, in the Shipping and Billing FastTab.

After posting, the code is on the posted sales shipment too, and you can still correct it there through the standard **Posted Sales Shipment - Update** page.

5.2 Run Combine Shipments

Run the report **Combine Shipments (CSH)**. The request page offers:

- **Combine From Date** and **Combine To Date**: the period of the shipments to combine.
- **Posting Date** and **Document Date** of the invoices to create. Both must be filled in; Posting Date defaults to the work date and Document Date to the Posting Date. An empty date stops the run with an error.
- **Calc. Inv. Discount**: defaults to the value in Sales & Receivables Setup; you can always turn it off for the single run, while you can turn it on only when the setup field is off.
- **Post Invoices**: post the created invoices immediately, or leave them as drafts to review first.
- Filters on **Sell-to Customer No.** and **Bill-to Customer No.** to restrict the batch.

The entered values are saved for the next run.

The request page: period, posting and document date, Post Invoices off, one bill-to customer filtered.

The report picks up only shipment lines with a quantity shipped and not yet invoiced, so running it twice does not duplicate invoices. Customers blocked with **A11** or **Invoice** are skipped.

5.3 The combined invoice

The result is one sales invoice per distinct combination of the grouping values in the period, with those values carried into the invoice header. Keep in mind:

- The customer master data has the final word. The revalidation of the mandatory fields resets payment terms, payment method and salesperson from the customer card, so the combined invoice follows the master data even where an order carried different values. In normal production this is invisible, because order and master data coincide.
- Free-text lines of the shipments are not copied to the combined invoice, by design: they carry no customer or grouping fields, so they cannot be attributed safely. Each shipment keeps its own heading line on the invoice, so the shipments remain distinguishable.

6. Italian localization

The companion app **AL Combine Shipments IT** adds the Italian deferred-invoicing rules on top of the base app; its behavior is visible only with the Italian localization of Business Central. It groups the shipments also by operation type (the *sezionale*), makes the **Operation Type** mandatory for the run, confines the run period within one month, carries the operation occurred date, the bank, CUP and CIG to the invoice header, hooks the VAT exemption handling, and forces the *fattura* (e-invoice) document type on the combined invoices. With the Italian localization the request page also shows the **Operation Type** and **Forced Fattura Document Type** options.

Fatt. cumulative (CSH)

Opzioni

Cumula da data	01/01/2026
Cumula a data	31/01/2026
Tipo Operazione	IT-VN-SLS
Data registrazione	31/01/2026
Data documento	31/01/2026
Calcola sconto fatt.	☐
Registra fatture	☐
Forza tipo documento fattura	

Filtro: Documenti sped. vendite

Programmazione... OK Annulla

The request page with the Italian localization: one-month period, mandatory Operation Type and the Forced Fattura Document Type option.

One configuration is required: the sezionale of the combined invoice follows the **Default Sales Operation Type** of the customer's VAT Business Posting Group, because the master data wins over the request page and the order. Set that field on your VAT business posting groups before running the combine. Without the companion app the grouping stays generic: no sezionale, no one-month limit, no forced document type.

Fattura vendita

102834 · Adatum Corporation

Home page Prepara Stampa/Invia Approvazione richieste Fattura Visualizza opzioni

Registra Rilascio

Indirizzo 2		ID utente assegnato	
Città	Genova	Tipo operazione	IT-VN-SLS
CAP	16100	Codice attività	
Codice paese/area geografica	IT	Stato	Aperto
Nr. contatto	CT000014	Descrizione lavoro	
Nr. di telefono		Partita IVA	789456278
Nr. cellulare		Nr. ordine delle spedizioni	
E-mail	robert.townes@contoso.com	Nr. registrazione	
Contatto	Andrea Ricci	Tipo ricevuta	(Vuoto)
Vs. riferimento		Nr. Ricevuta	0,00
Data documento	01/08/2027		
Data esecuzione operazione	01/08/2027		

The combined invoice with the Italian data: Operation Type, Operation Occurred Date and Document Date.

Dynamics 365 Business Central

Ambiente: bc28-it

Fattura vendita

102834 · Adatum Corporation

Home page | Prepara | Stampa/Invia | Approvazione richieste | Fattura | Visualizza opzioni

Registra | Rilascio

Dettagli fattura

Cod. valuta: []

Codice conto corrente bancario: []

Data spedizione: 01/08/2027

Tipo di caricatore di terze parti: (Vuoto)

Nr. caricatore di terze parti: []

Cat. reg. business IVA: NAZIONALE

Cod. condizioni pagam.: 1M(8G)

C/C bancario: ECA

Effetti cumulativi: []

Triangolazione intracomun.: []

Servizio di pagamento: Nessun servizio di pagamento

Reparto Codice: []

Categoriacliente Codice: MEDIA

ID mandato per addebito diretto: []

Tipo di documento Fattura: TD01

Codice unico di progetto: []

Codice identificativo gara: []

Timbro fattura: []

Importo timbro fattura: 0,00

Nr. ordine acquisto cliente: []

Nr. conto bancario pagamento: []

Panoramica dettagli contratto so...: (Vuoto)

Invoice details of the combined invoice: the forced e-invoice document type TD01 and the bank account carried from the order.

7. Where to find it

- **Tell Me:** search "CSH", or directly "Combine Shipment Setup (CSH)", "Combine Shipment List (CSH)", "Combine Shipments (CSH)" (the report).
- **Role center:** the **Combine Shipments (CSH)** group (the app installs the AppLibra role center; press Shift+F12, choose Explore other roles, then AppLibra).
- **On master data and documents:** **Combine Shipment No.** on the Customer card, on the sales order, and on the posted sales shipment (editable via **Posted Sales Shipment - Update**).

8. FAQ and limits

- **The run stops with an error on the dates.** Posting Date and Document Date are both required on the request page; fill them in and run again.
- **A customer's shipments are not invoiced.** Customers blocked with **A11** or **Invoice** are skipped by the batch. Check that the posted shipments carry a **Combine Shipment No.** and a quantity shipped not yet invoiced. Also check the license: after the one-month trial expires the run stops at the license check.
- **Do I have to certify a code?** Yes, as a working rule: **Certified** locks the field list so the grouping cannot change between runs. The run does not block an **Open** code by itself, so certify before handing the code to operations.
- **My grouping value does not reach the invoice header.** Check the **Sequence** of the code line: it must come after the mandatory setup fields, for example 100 and up.

- **Payment terms on the invoice differ from the order.** By design: the combined invoice follows the customer master data on the revalidated mandatory fields.
- **Text lines of the shipments are missing on the invoice.** By design: free-text lines are never copied; each shipment keeps its heading line on the invoice.
- **Can I group by any field?** By any field that exists both on the posted shipment and on the sales invoice header; the mapping is validated when you enter the setup line.
- **Running the batch twice.** Safe: only quantities shipped and not yet invoiced are picked up, so nothing is duplicated.
- **An operator cannot open the setup.** Expected with **ALPCS-USER** only: setup and codes require **ALPCS-ADMIN**. The legacy permission set was replaced by these two; the upgrade moves its assignments to ALPCS-ADMIN.

9. Support and resources

- Publisher: **AppLibra** - <https://applibra.com>
- Apps catalog: <https://applibra.com/apps>
- Privacy policy: <https://applibra.com/privacy-policy>
- Terms of use: <https://applibra.com/terms>