

Customer Item Invoice History

If you would like to purchase our app, scroll to the last page.

Setup

1. Assign User App Permissions by using the search function and typing “users” in the search field.

The screenshot shows the Dynamics 365 Business Central interface. A search bar at the top right contains the text 'users'. Below the search bar, a search results pane is open, displaying two search results. A red arrow points to the 'Users' result in the 'NAME' column.

NAME	DEPARTMENT
Users	Administration/IT Administration/General
ADCS Users	Application Setup/Warehouse/ADCS

2. Drill into user.

The screenshot shows the Dynamics 365 Business Central 'Users' page. The page title is 'Users'. The main content area displays a table with columns for 'USER NAME', 'FULL NAME', 'STATE', and 'AUTHENTICATION'. A red arrow points to the 'DEMOUSER' entry in the 'USER NAME' column.

USER NAME	FULL NAME	STATE	AUTHENTICATION
DEMOUSER	...	Enabled	

3. Add WS-CSTITMHST permission set.

The screenshot shows the Dynamics 365 Business Central interface for a User Card. The 'User Permission Sets' section contains a table with the following data:

PERMISSION SET	DESCRIPTION	COMPANY	EXTENSION NAME
SUPER	...	This role has all permissions.	

A red arrow points to the 'SUPER' permission set in the table.

The screenshot shows the Dynamics 365 Business Central interface for a User Card with a 'PERMISSION SET LOOKUP' dialog box open. The dialog box has a search input field containing 'ws' and a table with the following data:

ROLE ID	NAME	EXTENSION NAME
WS-CSTITM...	...	WS - Customer It... Customer Item Invoice History

A red arrow points to the 'OK' button in the dialog box.

Usage

This application provides a listing of past posted invoice lines for a given Sell-to Customer/Item combination. It allows to see what the customer was charged in the past and allows you an easy way to update the current line pricing. The function can be access from three areas. (Sales Quotes, Sales Orders & Sales Invoices)

Sales Quotes

1. Go to the sales quotes list.

The screenshot shows the Dynamics 365 Business Central interface. A search dialog box is open, titled "SEARCH FOR PAGE OR REPORT". The search criteria is "sales quotes", resulting in 4 search results. A red arrow points to the first result, "Sales Quotes", which is in the "Home" department.

NAME	DEPARTMENT
Sales Quotes	Home
Sales Quotes	Sales
Sales Quotes	Departments/Sales & Marketing/Order Processing
Quotes - Dynamics 365 for Sales	Departments/Sales & Marketing/Microsoft Dynamics 365 for...

2. Drill into your sales quote.

The screenshot shows the Dynamics 365 Business Central interface with the "Sales Quotes" list view. A red arrow points to the first row of the list, which is highlighted in blue. The list contains two rows of data.

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	SELL-TO CONTACT	POSTING DATE	DUE DATE	REQUESTED DELIVERY DATE	AMOUNT	LOCATION CODE
S-QUO1001	20000	Trey Research	Helen Ray	4/2/2018	4/16/2018		2,896.00	
S-QUO1002	40000	Alpine Ski House	Ian Deberry	4/3/2018	5/3/2018		1,427.50	

3. Select the line you wish to see past invoice history for. Select the Lines:Line menu from the action ribbon and press on the “Past Invoices” action.

The screenshot shows the Dynamics 365 Business Central interface for a sales quote. The ribbon is set to 'Lines' and the 'FUNCTIONS' group is active. A red arrow points to the 'Past Invoices' icon in the ribbon. Below the ribbon, the 'General' section shows customer information for 'Trey Research' and 'Helen Ray'. The 'Lines' section contains a table with one line item.

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. V
Item	1936-S	BERLIN Guest Chair, yellow		10	0	PCS	2

Sales Orders

1. Go to the Sales Orders list.

The screenshot shows a search results window in Dynamics 365 Business Central. The search term 'sales orders' has been entered, resulting in 14 search results. A red arrow points to the first result, 'Sales Orders', which is highlighted in blue. The results table lists various sales order types and their associated departments.

NAME	DEPARTMENT
Sales Orders	Home
Sales Orders	Sales
Blanket Sales Orders	Sales
Sales Return Orders	Sales
Sales Orders	Departments/Sales & Marketing/Order Processing
Blanket Sales Orders	Departments/Sales & Marketing/Order Processing

2. Drill into your sales order.

The screenshot shows the Dynamics 365 Business Central interface for Sales Orders. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Sales Orders'. Below this is a ribbon with 'HOME', 'ACTIONS', 'NAVIGATE', and 'REPORT' tabs. The 'ACTIONS' tab is active, showing options like 'New', 'Edit', 'View', 'Delete', 'Sales Reservation Avail.', 'Approvals', and 'Open in Excel'. The main area displays a table of sales orders with columns: NO., SELL-TO CUSTOMER NAME, EXTERNAL DOCUMENT NO., LOCATION CODE, DOCUMENT DATE, COMPLETE... SHIPPED, AMOUNT SHIPPED NOT INVOICED (LCY), and AMOUNT SHIPPED NOT INVOICED (LCY) INCL. VAT. The first row, S-ORD101001, is highlighted in light blue, and a red arrow points to its 'NO.' column.

NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUMENT NO.	LOCATION CODE	DOCUMENT DATE	COMPLETE... SHIPPED	AMOUNT SHIPPED NOT INVOICED (LCY)	AMOUNT SHIPPED NOT INVOICED (LCY) INCL. VAT
S-ORD101001	Adatum Corporation			4/2/2018	No	0.00	0.00
S-ORD101002	Adatum Corporation			5/1/2018	No	0.00	0.00
S-ORD101003	School of Fine Art			4/22/2018	No	0.00	0.00
S-ORD101004	Alpine Ski House			5/13/2018	No	0.00	0.00

3. Select the line you wish to see past invoice history for. Select the Lines:Line menu from the action ribbon and press on the "Past Invoices" action.

The screenshot shows the Dynamics 365 Business Central interface for a specific sales order, S-ORD101001 - Adatum Corporation. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Sales Orders > S-ORD101001 - Adatum Corporation'. Below this is a ribbon with 'HOME', 'ACTIONS', 'NAVIGATE', and 'REPORT' tabs. The 'ACTIONS' tab is active, showing options like 'Explosion BOM', 'Select Nonstock Items', 'Event', 'BOM Level', 'Reservation Entries', 'Dimensions', 'Past Invoices', 'Document Line Tracking', 'Insert Ext. Texts', 'Period', 'Item Tracking Lines', 'Item Charge Assignment', 'Attachments', 'Deferral Schedule', 'Reserve...', 'Location', 'Select Item Substitution', 'Order Promising', and 'Assemble to Order'. The 'Past Invoices' action is highlighted in light blue, and a red arrow points to it. The main area displays the sales order details for S-ORD101001 - Adatum Corporation, including a 'General' section with fields for Customer Name, Contact, Posting Date, and Order Date.

EDIT - SALES ORDER - S-ORD101001 - ADATUM CORPORATION

S-ORD101001 · Adatum Corporation

General

Customer Name	Adatum Corporation	Due Date
Contact	Robert Townes	Requested Delivery Date
Posting Date	4/2/2018	External Document No.
Order Date	4/2/2018	

Sales Invoices

1. Go to the Sales Invoice list.

The screenshot shows the Dynamics 365 Business Central interface. A search window is open with the text 'Sales invoices' entered. The search results list several items, with a red arrow pointing to the 'Sales Invoices' entry under the 'Sales' department.

NAME	DEPARTMENT
Sales Invoices	Home
Sales Invoices - Pending Document Exchange	Home
Sales Invoices	Sales
Posted Sales Invoices	Sales
Sales Invoices	Departments/Financial Management/Receivables
Posted Sales Invoices	Financial Management/Receivables/History
Sales Invoices	Departments/Sales & Marketing/Order Processing
Posted Sales Invoices	Departments/Sales & Marketing/History

2. Drill into your Sales Invoice

The screenshot shows the 'Sales Invoices' list in Dynamics 365 Business Central. A red arrow points to the first invoice, 'S-INV102199', which is highlighted in blue. The table below shows the details of several invoices.

NO.	SELL-TO CUSTOMER NAME	SELL-TO CONTACT	POSTING DATE	LOCATION CODE	DUE DATE
S-INV102199	Adatum Corporation	Robert Townes	4/4/2018		5/4/2018
S-INV102200	Adatum Corporation	Robert Townes	5/1/2018		6/1/2018
S-INV102201	Trey Research	Helen Ray	4/3/2018		4/17/2018
S-INV102202	School of Fine Art	Meagan Bond	4/5/2018		4/30/2018
S-INV102203	School of Fine Art	Meagan Bond	5/13/2018		5/31/2018
S-INV102204	Alpine Ski House	Ian Deberry	5/1/2018		6/1/2018
S-INV102205	Relecloud	Jesse Homer	4/2/2018		4/16/2018

- Select the line you wish to see past invoice history for. Select the Lines:Line menu from the action ribbon and press on the “Past Invoices” action.

The screenshot shows the Dynamics 365 Business Central interface for editing a sales invoice (S-INV102199) for Adatum Corporation. The ribbon is set to 'Lines'. The 'Past Invoices' action is highlighted with a red arrow. Below the ribbon, the invoice details are shown, including Customer Name (Adatum Corporation), Posting Date (4/4/2018), Contact (Robert Townes), and Due Date (5/4/2018). The 'Lines' section contains a table with the following data:

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	TAX GROUP CODE	LINE DISCOUNT %	LINE AMOUNT EXCL. VAT	AMOUNT INCLUDING VAT	QTY. TO AS
Item	1968-S	MEXICO Swivel Chair, black		5	PCS	285.50	TAXABLE		1,427.50	1,613.08	
Item	1996-S	ATLANTA Whiteboard, base		7	PCS	2,099.10	TAXABLE		14,693.70	16,603.88	
Comment		Thank you for ordering								0.00	

The Past Invoices Page

- The past invoices page provides you a list of all past posted sales invoice lines for the selected customer & item. If you wish to update your current document price with that from a selected line in the “Past Invoice” age, press the “Revise Line Price” action from the action ribbon.

The screenshot shows the Dynamics 365 Business Central interface for editing a sales order (S-ORD101001) for Adatum Corporation. The ribbon is set to 'Lines'. The 'Past Invoices' action is highlighted with a red arrow. Below the ribbon, the 'VIEW - PAST INVOICES' page is displayed for Control1120075007. The page shows the Customer (10000: Adatum Corporation) and Item (1996-S: ATLANTA Whiteboard...). A table lists the past invoices with the following data:

DOCUMENT NO.	SHIPMENT DATE	QUANTITY	UNIT OF MEASURE	UNIT PRICE EXCL. VAT
PS-INV103191	3/21/2018	7	Piece	2,099.10
PS-INV103178	3/21/2018	6	Piece	2,099.10
PS-INV103165	3/21/2018	4	Piece	2,099.10
PS-INV103157	3/21/2018	2	Piece	2,099.10
PS-INV103136	3/21/2018	4	Piece	2,099.10
PS-INV103125	3/21/2018	4	Piece	2,099.10
PS-INV103110	3/21/2018	4	Piece	2,099.10
PS-INV103099	3/21/2018	5	Piece	2,099.10
PS-INV103085	3/21/2018	4	Piece	2,099.10
PS-INV103070	3/21/2018	5	Piece	2,099.10
PS-INV103059	3/21/2018	5	Piece	2,099.10
PS-INV103044	3/21/2018	6	Piece	2,099.10
PS-INV103033	3/21/2018	6	Piece	2,099.10
PS-INV103020	3/21/2018	4	Piece	2,099.10
PS-INV103007	3/21/2018	4	Piece	2,099.10

2. Answer yes to update your current document line price.

The screenshot shows the Dynamics 365 Business Central interface. The main window displays a sales order for 'S-ORD101001' from 'Adatum Corporation'. A 'VIEW - PAST INVOICES' window is open, showing a list of invoices. A confirmation dialog box is overlaid on the screen, asking: 'Update Unit price from 2,099.1 to 2,099.1?'. The dialog has 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button.

DOCUMENT NO.	SHIPMENT DATE	QUANTITY	UNIT OF MEASURE	UNIT PRICE EXCL. VAT
PS-INV103191	3/21/2018	7	Piece	2,099.10
PS-INV103178	3/21/2018	6	Piece	2,099.10
PS-INV103165	3/21/2018	4	Piece	2,099.10
PS-INV103157	3/21/2018	2	Piece	2,099.10
PS-INV103136	3/21/2018	4	Piece	2,099.10
PS-INV103125	3/21/2018	4	Piece	2,099.10
PS-INV103110	3/21/2018	4	Piece	2,099.10
PS-INV103099	3/21/2018	5	Piece	2,099.10
PS-INV103085	3/21/2018	4	Piece	2,099.10
PS-INV103070	3/21/2018	5	Piece	2,099.10

3. Close the page to return to your document.

The screenshot shows the same Dynamics 365 Business Central interface. The 'VIEW - PAST INVOICES' window is still open. A red arrow points to the 'Close' button at the bottom right of the window.

DOCUMENT NO.	SHIPMENT DATE	QUANTITY	UNIT OF MEASURE	UNIT PRICE EXCL. VAT
PS-INV103191	3/21/2018	7	Piece	2,099.10
PS-INV103178	3/21/2018	6	Piece	2,099.10
PS-INV103165	3/21/2018	4	Piece	2,099.10
PS-INV103157	3/21/2018	2	Piece	2,099.10
PS-INV103136	3/21/2018	4	Piece	2,099.10
PS-INV103125	3/21/2018	4	Piece	2,099.10
PS-INV103110	3/21/2018	4	Piece	2,099.10
PS-INV103099	3/21/2018	5	Piece	2,099.10
PS-INV103085	3/21/2018	4	Piece	2,099.10
PS-INV103070	3/21/2018	5	Piece	2,099.10
PS-INV103059	3/21/2018	5	Piece	2,099.10
PS-INV103044	3/21/2018	6	Piece	2,099.10
PS-INV103033	3/21/2018	6	Piece	2,099.10
PS-INV103020	3/21/2018	4	Piece	2,099.10
PS-INV103007	3/21/2018	4	Piece	2,099.10

If you wish to create a Customer Item Price, press the “Create Customer Item Price” action button from the ribbon.

Dynamics 365 Business Central Sales Orders > S-ORD101001 · Adatum Corporation

HOME ACTIONS NAVIGATE REPORT MANAGE LINE ORDER

EXPLODE BOM SELECT NONSTOCK ITEMS EVENT BOM LEVEL INSERT EXT. TEXTS PERIOD LOCATION FUNCTIONS ITEM AVAILABILITY BY RESERVE...

VIEW - PAST INVOICES

Control1120075007

Customer: 10000: Adatum Corporation Item: 1996-S: ATLANTA Whiteboar...

DOCUMENT NO.	SHIPMENT DATE	QUANTITY	UNIT OF MEASURE	UNIT PRICE EXCL. VAT
PS-INV103191	3/21/2018	7	Piece	2,099.10
PS-INV103178	3/21/2018	6	Piece	2,099.10
PS-INV103165	3/21/2018	4	Piece	2,099.10
PS-INV103157	3/21/2018	2	Piece	2,099.10
PS-INV103136	3/21/2018	4	Piece	2,099.10
PS-INV103125	3/21/2018	4	Piece	2,099.10
PS-INV103110	3/21/2018	4	Piece	2,099.10
PS-INV103099	3/21/2018	5	Piece	2,099.10
PS-INV103085	3/21/2018	4	Piece	2,099.10
PS-INV103070	3/21/2018	5	Piece	2,099.10
PS-INV103059	3/21/2018	5	Piece	2,099.10
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PS-INV103033	3/21/2018	6	Piece	2,099.10
PS-INV103020	3/21/2018	4	Piece	2,099.10
PS-INV103007	3/21/2018	4	Piece	2,099.10

Subtotal Excl. VAT (CAD)
Inv. Discount Amount Excl. VAT (CAD)
Invoice Discount %

Invoice Details
Currency Code
Payment Terms Code
Tax Liabile

AMOUNT INCLUDING VAT 28,463.80 QTY. TO SHIP 12

Close

4. Answer Yes to create a new customer item price record.

Dynamics 365 Business Central S-ORD101001 · Adatum Corporation

HOME ACTIONS NAVIGATE REPORT MANAGE LINE ORDER

EXPLODE BOM SELECT NONSTOCK ITEMS EVENT BOM LEVEL INSERT EXT. TEXTS PERIOD LOCATION FUNCTIONS ITEM AVAILABILITY BY RESERVE...

VIEW - PAST INVOICES

Control1120075007

Customer: 10000: Adatum Corporation Item: 1996-S: ATLANTA Whiteboar...

DOCUMENT NO.	SHIPMENT DATE	QUANTITY	UNIT OF MEASURE	UNIT PRICE EXCL. VAT
PS-INV103191	3/21/2018	7	Piece	2,099.10
PS-INV103178	3/21/2018	6	Piece	2,099.10
PS-INV103165	3/21/2018	4	Piece	2,099.10
PS-INV103157	3/21/2018	2	Piece	2,099.10
PS-INV103136	3/21/2018	4	Piece	2,099.10
PS-INV103125	3/21/2018	4	Piece	2,099.10
PS-INV103110	3/21/2018	4	Piece	2,099.10
PS-INV103099	3/21/2018	5	Piece	2,099.10
PS-INV103085	3/21/2018	4	Piece	2,099.10
PS-INV103070	3/21/2018	5	Piece	2,099.10

Subtotal Excl. VAT (CAD)
Inv. Discount Amount Excl. VAT (CAD)
Invoice Discount %

AMOUNT INCLUDING VAT 28,463.80 QTY. TO SHIP 12

Do you wish to create a new customer specific item price of 2,099.1 starting 04/09/18?

Yes No

Also, you can view the customer picture & Item picture from the “Past Invoice” page. Press on the grey arrow to show the information.

VIEW - PAST INVOICES

Control1120075007

Customer: 10000: Adatum Corporation Item: 1996-S: ATLANTA Whiteboard...

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PS-INV103110	3/21/2018	4	Piece	2,099.10
PS-INV103099	3/21/2018	5	Piece	2,099.10
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PS-INV103033	3/21/2018	6	Piece	2,099.10
PS-INV103020	3/21/2018	4	Piece	2,099.10
PS-INV103007	3/21/2018	4	Piece	2,099.10

Amount including VAT: 28,463.80 Qty. to Ship: 12

VIEW - PAST INVOICES

Control1120075007

Customer: 10000: Adatum Corporation Item: 1996-S: ATLANTA Whiteboard...

DOCUMENT NO.	SHIPMENT DATE	QUANTITY	UNIT OF MEASURE	UNIT PRICE EXCL. VAT
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PS-INV103099	3/21/2018	5	Piece	2,099.10
PS-INV103085	3/21/2018	4	Piece	2,099.10
PS-INV103070	3/21/2018	5	Piece	2,099.10
PS-INV103059	3/21/2018	5	Piece	2,099.10
PS-INV103044	3/21/2018	6	Piece	2,099.10
PS-INV103033	3/21/2018	6	Piece	2,099.10
PS-INV103020	3/21/2018	4	Piece	2,099.10
PS-INV103007	3/21/2018	4	Piece	2,099.10

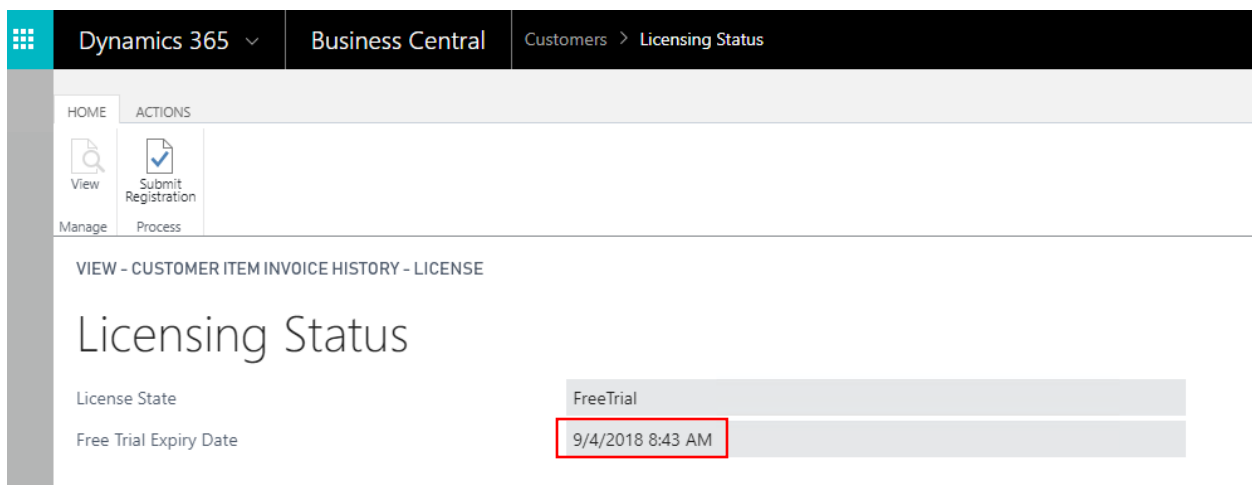
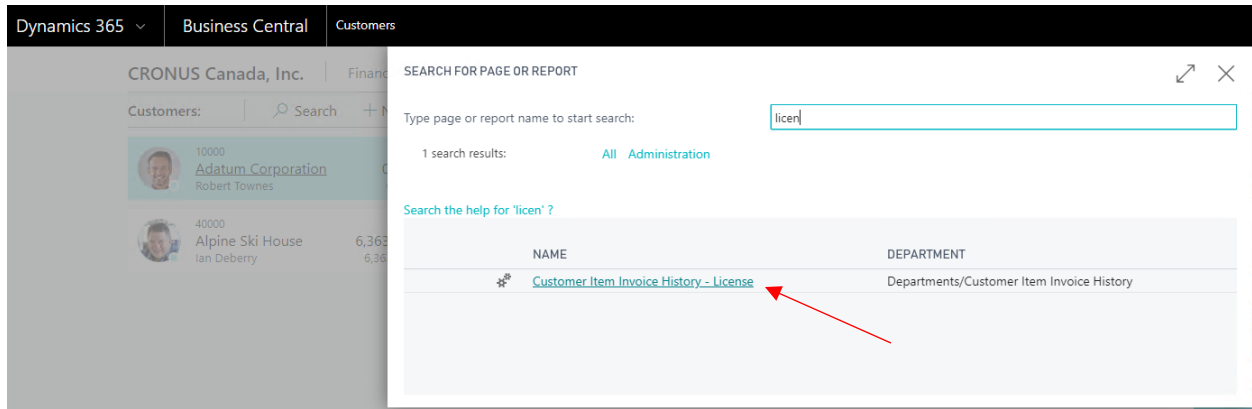
Customer Picture: [Image of a man]

Item Picture: [Image of a whiteboard]

Amount including VAT: 28,463.80 Qty. to Ship: 12

How to purchase our Customer Item Invoice History for Dynamics 365 app

You will get access to our Customer Item Invoice History app for Dynamics 365 free for 30 days. If you would like to view the free trial expire date, search for customer item invoice history in the search bar.



Contact accounting@websan.com or 416-499-1235, when you're ready to purchase our app.