

# Customer Item Invoice History

## 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 dropdown menu displays '2 search results: All Lists'. A red arrow points to the 'Users' link in the search results. The search results table is as follows:

NAME	DEPARTMENT
<a href="#">Users</a>	Administration/IT Administration/General
<a href="#">ADCS Users</a>	Application Setup/Warehouse/ADCS

2. Drill into user.

The screenshot shows the Dynamics 365 Business Central 'Users' page. The 'VIEW - USERS' section is active, showing a table of users. A red arrow points to the 'DEMOUSER' entry in the 'USER NAME' column. The table is as follows:

USER NAME	FULL NAME	STATE	AUTHENTICATION E
DEMOUSER	...	Enabled	

### 3. Add WS-CSTITMHST permission set.

**Dynamics 365 Business Central** | Users > User Card

**EDIT - USER CARD**

## User Card

**General**

User Name: DEMOUSER | State: Enabled

Full Name: | Contact Email: |

**Web Service Access >**

**Office 365 Authentication >**

**User Groups**

CODE	NAME	COMPANY NAME
		CRONUS Canada, Inc.

**User Permission Sets**

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

**Dynamics 365 Business Central** | User Card

**EDIT - USER CARD**

## User Card

**General**

User Name: DEMOUSER | State: Enabled

Full Name: | Contact Email: |

**Web Service Access >**

**Office 365 Authentication >**

**User Groups**

CODE	NAME	COMPANY

HOME

PERMISSION SET LOOKUP | WS

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

OK Cancel

## 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, displaying search results for 'sales quotes'. The results table lists four items, with the first one highlighted by a red arrow.

NAME	DEPARTMENT
<a href="#">Sales Quotes</a>	Home
<a href="#">Sales Quotes</a>	Sales
<a href="#">Sales Quotes</a>	Departments/Sales & Marketing/Order Processing
<a href="#">Quotes - Dynamics 365 for Sales</a>	Departments/Sales & Marketing/Microsoft Dynamics 365 for...

2. Drill into your sales quote.

The screenshot shows the 'Sales Quotes' list in Dynamics 365 Business Central. The list contains two quotes, with the first one highlighted by a red arrow.

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. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Sales Quotes > S-QUO1001 · Trey Research'. The 'FUNCTIONS' ribbon is active, showing the 'Lines' menu. A red arrow points to the 'Past Invoices' action under the 'Lines' menu. Below the ribbon, the 'EDIT - SALES QUOTE - S-QUO1001 · TREY RESEARCH' page is displayed. The 'General' tab is selected, showing fields for 'Customer Name' (Trey Research), 'Contact' (Helen Ray), 'Due Date', and 'Requested Delivery Date'. The 'Lines' section shows a table with columns: TYPE, NO., DESCRIPTION, LOCATION CODE, QUANTITY, QTY. TO ASSEMBLE TO ORDER, UNIT OF MEASURE CODE, and UNIT PRICE EXCL. V. The first line is an 'Item' with NO. 1936-S, DESCRIPTION 'BERLIN Guest Chair, yellow', QUANTITY 10, and QTY. TO ASSEMBLE TO ORDER 0.

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

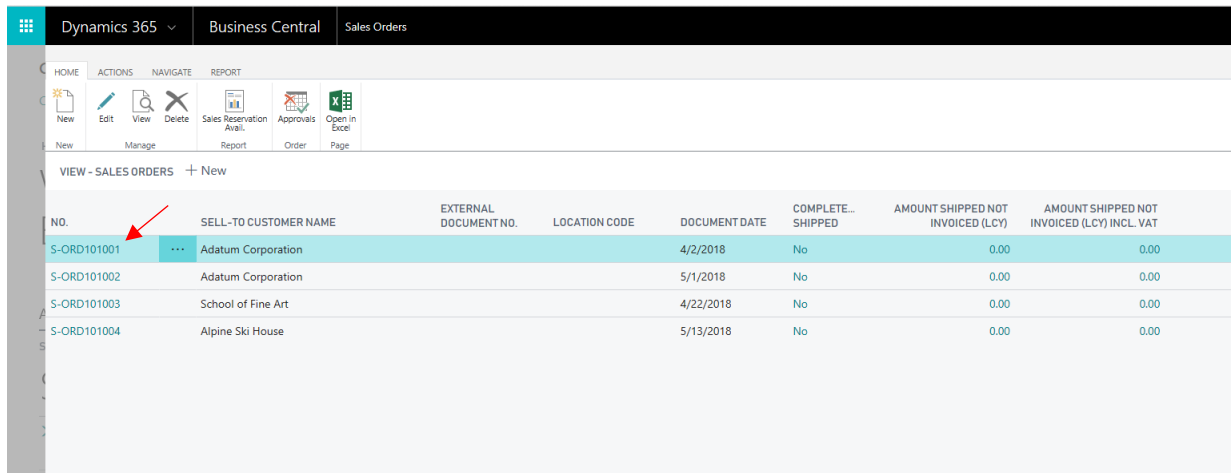
## Sales Orders

1. Go to the Sales Orders list.

The screenshot shows the Dynamics 365 Business Central interface with a search overlay. The search bar contains 'sales orders'. The search results show 14 results. A red arrow points to the first result, 'Sales Orders', which is highlighted. The search results table has columns: NAME and DEPARTMENT.

NAME	DEPARTMENT
<a href="#">Sales Orders</a>	Home
<a href="#">Sales Orders</a>	Sales
<a href="#">Blanket Sales Orders</a>	Sales
<a href="#">Sales Return Orders</a>	Sales
<a href="#">Sales Orders</a>	Departments/Sales & Marketing/Order Processing
<a href="#">Blanket Sales Orders</a>	Departments/Sales & Marketing/Order Processing

## 2. Drill into your sales order.



Dynamics 365 Business Central Sales Orders

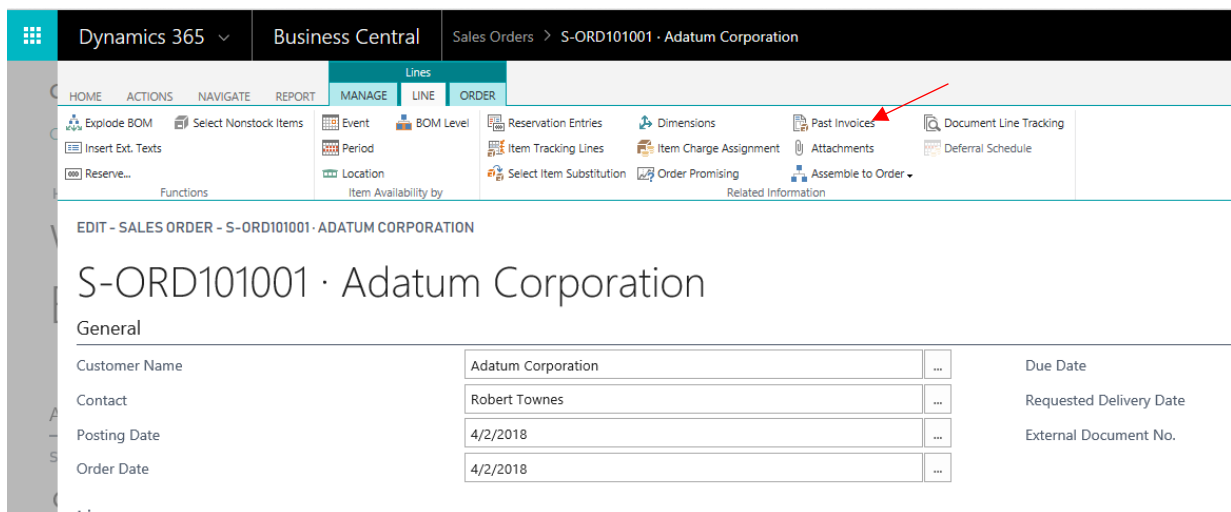
HOME ACTIONS NAVIGATE REPORT

New Edit View Delete Sales Reservation Avail. Approvals Open in Excel

VIEW - SALES ORDERS + New

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.



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 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 Assemble to Order

Functions Item Availability by Related Information

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 bar at the top right contains the text 'Sales invoices'. Below the search bar, a list of search results is displayed. A red arrow points to the third result, 'Sales Invoices', which is under the 'Sales' department.

NAME	DEPARTMENT
<a href="#">Sales Invoices</a>	Home
<a href="#">Sales Invoices - Pending Document Exchange</a>	Home
<a href="#">Sales Invoices</a>	Sales
<a href="#">Posted Sales Invoices</a>	Sales
<a href="#">Sales Invoices</a>	Departments/Financial Management/Receivables
<a href="#">Posted Sales Invoices</a>	Financial Management/Receivables/History
<a href="#">Sales Invoices</a>	Departments/Sales & Marketing/Order Processing
<a href="#">Posted Sales Invoices</a>	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 row, which has the invoice number 'S-INV102199'.

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

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 invoice (S-INV102199) for Adatum Corporation. The 'Lines' menu is open, and the 'Past Invoices' action is highlighted with a red arrow. The main window displays the invoice details, including the customer name (Adatum Corporation), posting date (4/4/2018), and a table of invoice lines.

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	

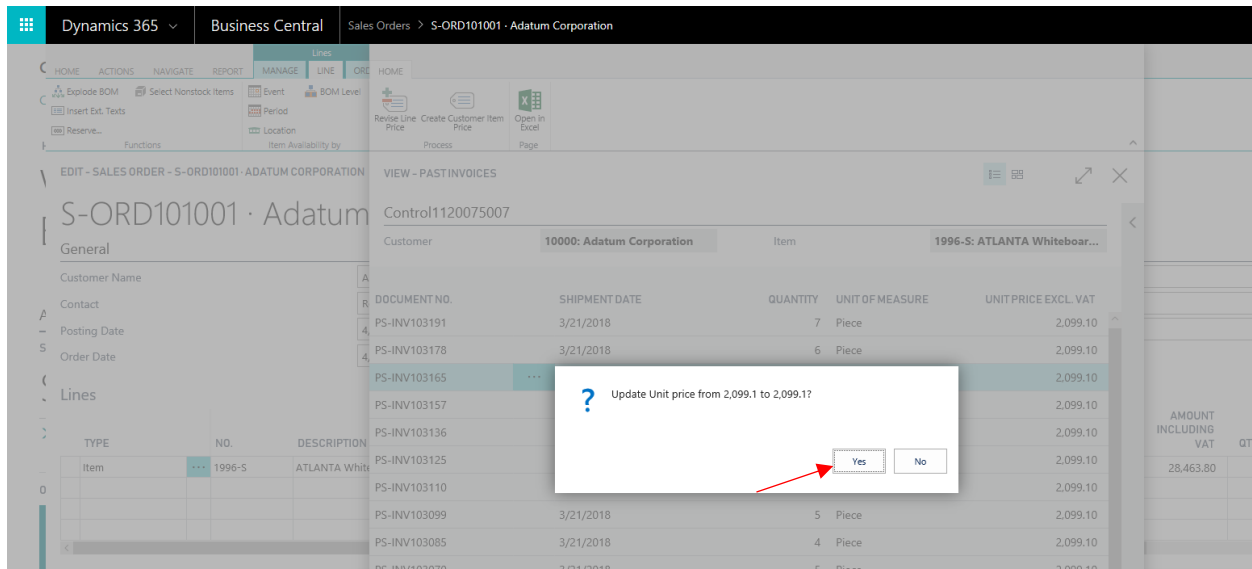
## The Past Invoices Page

1. 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.

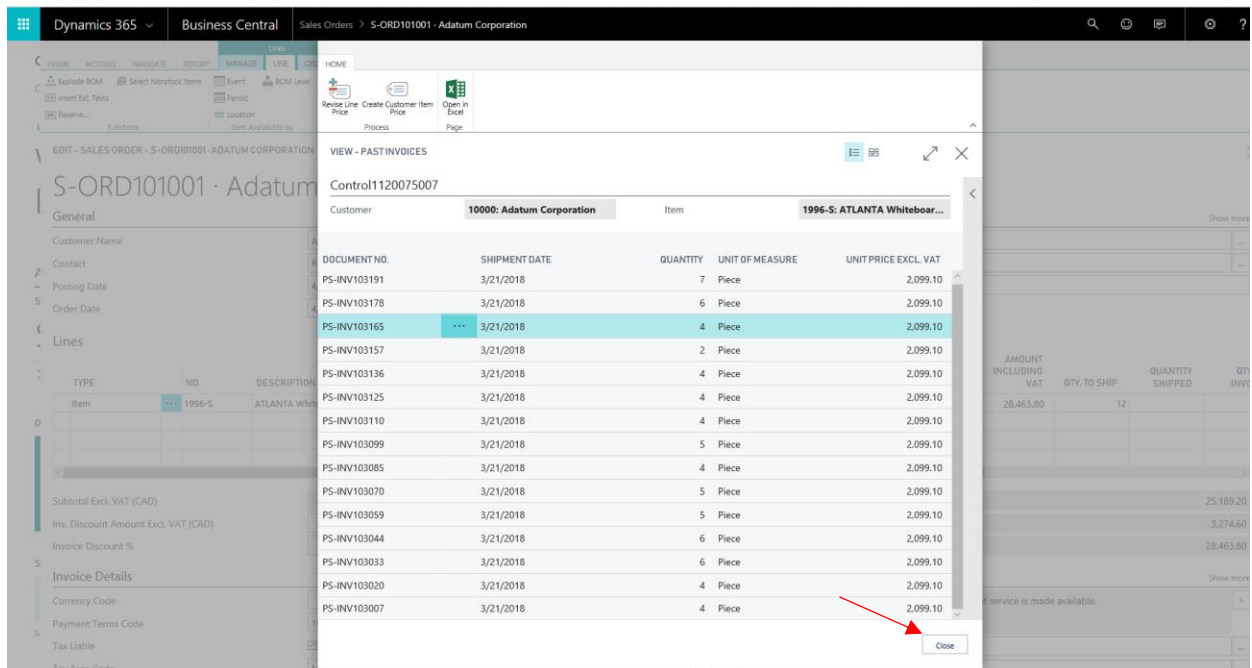
The screenshot shows the Dynamics 365 Business Central interface for a sales order (S-ORD101001) for Adatum Corporation. The 'Past Invoices' page is open, displaying a list of past invoices for the selected customer (10000: Adatum Corporation) and item (1996-S: ATLANTA Whiteboard...). The 'Revise Line Price' action is highlighted with a red arrow. The main window displays the invoice details, including the customer name (Adatum Corporation), posting date (4/4/2018), and a table of invoice lines.

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.



3. Close the page to return to your document.



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

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

EDIT - SALES ORDER - S-ORD101001 · ADATUM CORPORATION

S-ORD101001 · Adatum Corporation

General

Customer Name  
 Contact  
 Posting Date  
 Order Date

Lines

TYPE	NO.	DESCRIPTION
Item	1996-S	ATLANTA Whiteboard

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

Invoice Details

Currency Code  
 Payment Terms Code  
 Tax Liability

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
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

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

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

VIEW - SALES ORDER - S-ORD101001 · ADATUM CORPORATION

S-ORD101001 · Adatum Corporation

General

Customer Name  
 Contact  
 Posting Date  
 Order Date

Lines

TYPE	NO.	DESCRIPTION
Item	1996-S	ATLANTA Whiteboard

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

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
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

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.

**Dynamics 365** | Business Central | S-ORD101001 - Adatum Corporation

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VIEW - SALES ORDER - S-ORD101001 - ADATUM CORPORATION

## S-ORD101001 · Adatum Corporation

General

Customer Name  
Contact  
Posting Date  
Order Date

Listings

TYPE	NO.	DESCRIPTION
Item	1996-S	ATLANTA Whiteboard

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

Invoice Details

Currency Code  
Payment Terms Code  
Tax Liable  
Tax Area Code

Shipping and Billing

VIEW - PAST INVOICES

Control1120075007

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

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

AMOUNT INCLUDING VAT    QTY TO SHIP  
28,463.80                  12

... service is made available.

**Dynamics 365** | Business Central | S-ORD101001 - Adatum Corporation

## S-ORD101001 · Adatum Corporation

HOME ACTIONS NAVIGATE REPORT MANAGE LINE CARD

- Explosive BOM Select Nonstock Items
- Insert Ext. Tests
- Reserve...

Functions

LINE CARD

- Event BOM Level
- Period Location Item Availability by

HOME

- Revise Line Price Process
- Create Customer Item Price
- Open in Excel Page

### VIEW - PAST INVOICES

Control1120075007

Customer	10000: Adatu...	Item	1996-S: ATLA...
	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

>

Customer Picture ▾

Item Picture ▾

Close

AMOUNT INCLUDING VAT 28,463.80

QTY. TO SHIP 12

QUANTITY SHIPPED

service is made available.

VIEW - SALES ORDER - S-ORD101001 - ADATUM CORPORATION

General

Customer Name  
Contact  
Posting Date  
Order Date

Lines

TYPE	NO.	DESCRIPTION
Item	1996-S	ATLANTA WH

Subtotal Excl. Vat (CAD)  
Inv. Discount Amount Excl. VAT (CAD)  
Invoice Discount %  
Invoice Details  
Currency Code  
Payment Terms Code  
Tax Liabile  
Tax Area Code

Shipping and Billing