

Promo Customers - Add or Edit Industry Group for Contact

This guide outlines the step-by-step process for adding or editing Industry Groups for contacts in BC.

In BC, a customer must have a Contact Number generated before they can be added to a campaign or promotion.

The steps in this guide explain how to link contacts to a promo group, which in BC is referred to as an Industry Group. For simplicity, Industry Groups are created only for customers who have promotions, and they are built based on the Customer Price Groups.

1 First step in this guide is to search up any existing Industry groups.

Business Central

Environment: ECL-ENV-USA-PROD-FR

VZANA PRODUCTS CO., INC. | < Finance Cash Management Sales Purchasing Popdock ForNAV Shopify > | PA SO

Customers Vendors Items Bank Accounts Chart of Accounts Item Tracking Info Status Production BOMs

Get started

Here are a few steps that make you ready for business

Your checklist:

1. A first look around
2. Company details
3. Update users
4. User permissions
5. User settings
6. Outgoing email

Enter company details

Provide your company's name, address, logo, and other basic information.

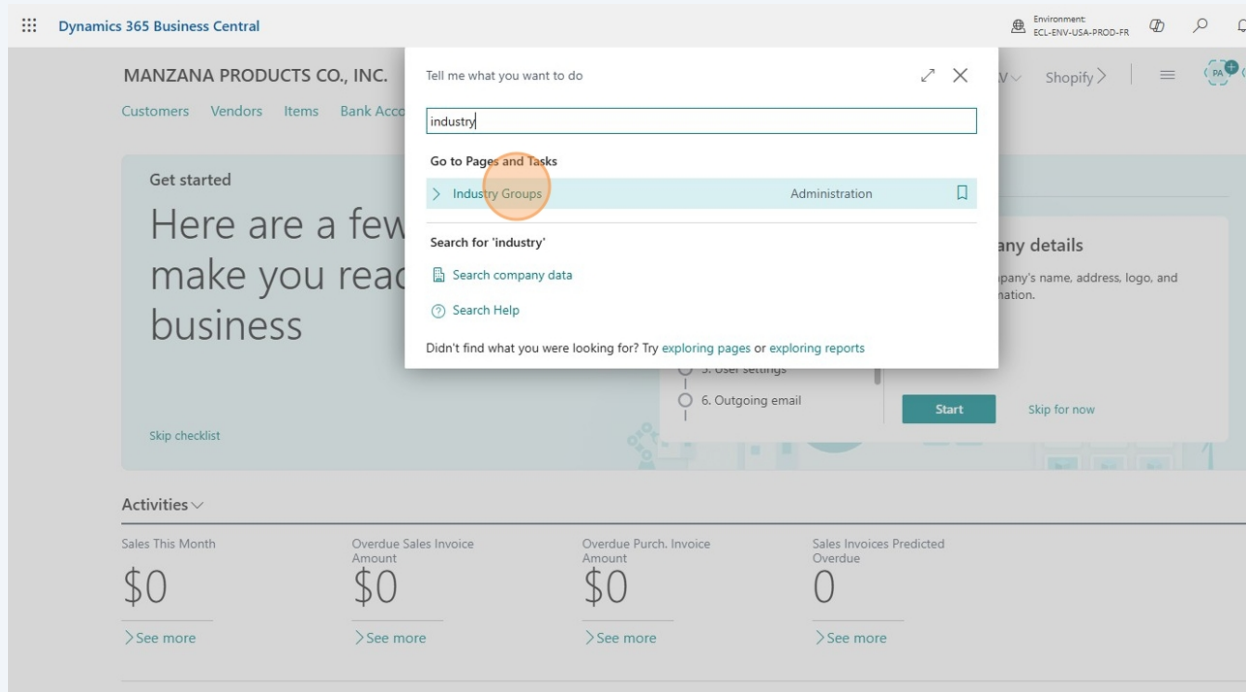
3 minutes

Start Skip for now

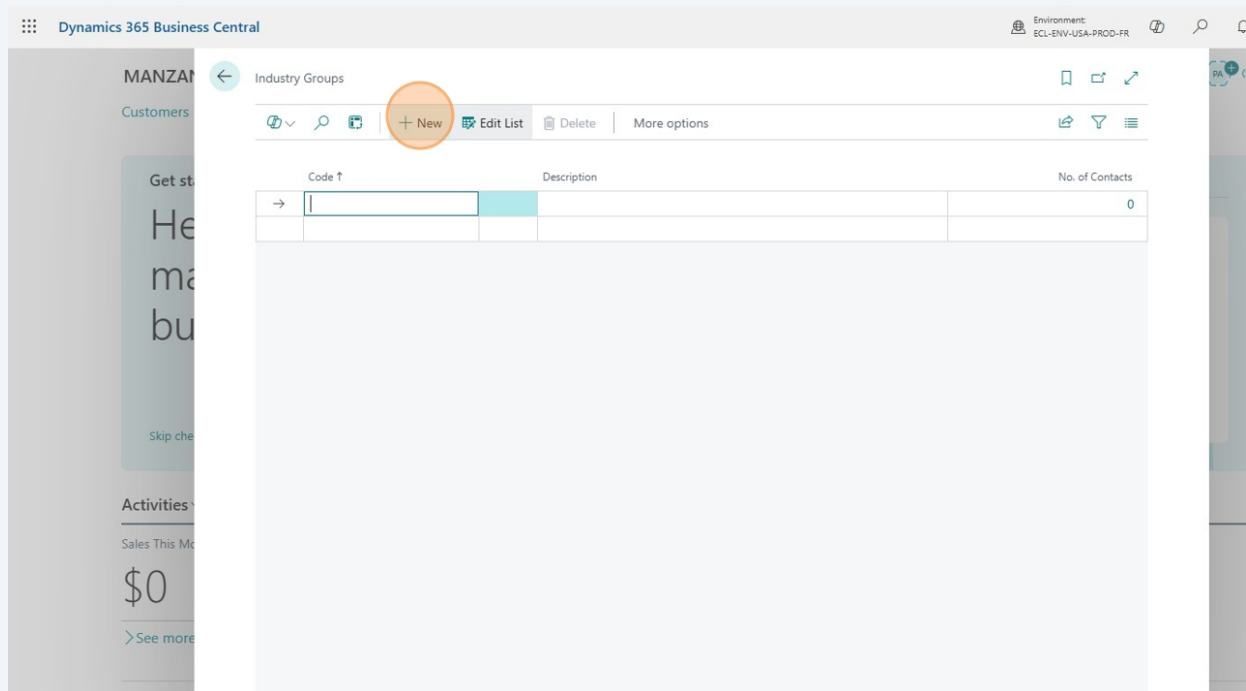
Activities

This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
0	\$0	\$0	0
> See more	> See more	> See more	> See more

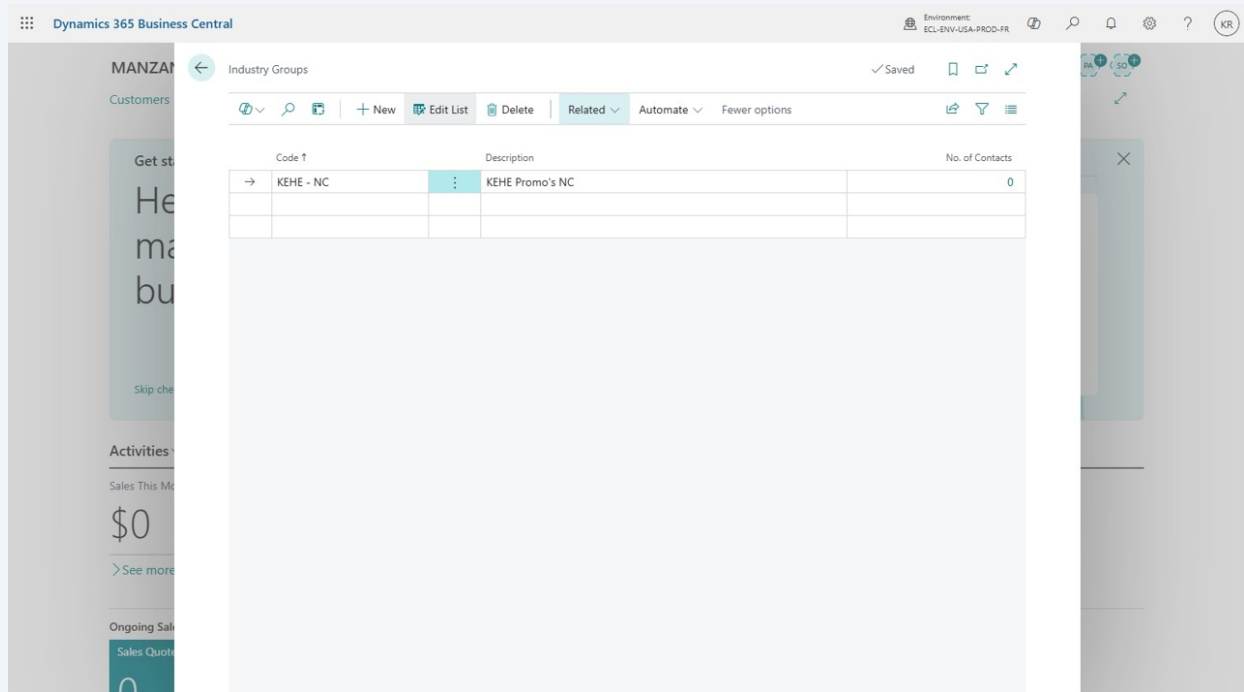
2 Search Industry Group and Click "Industry Groups"



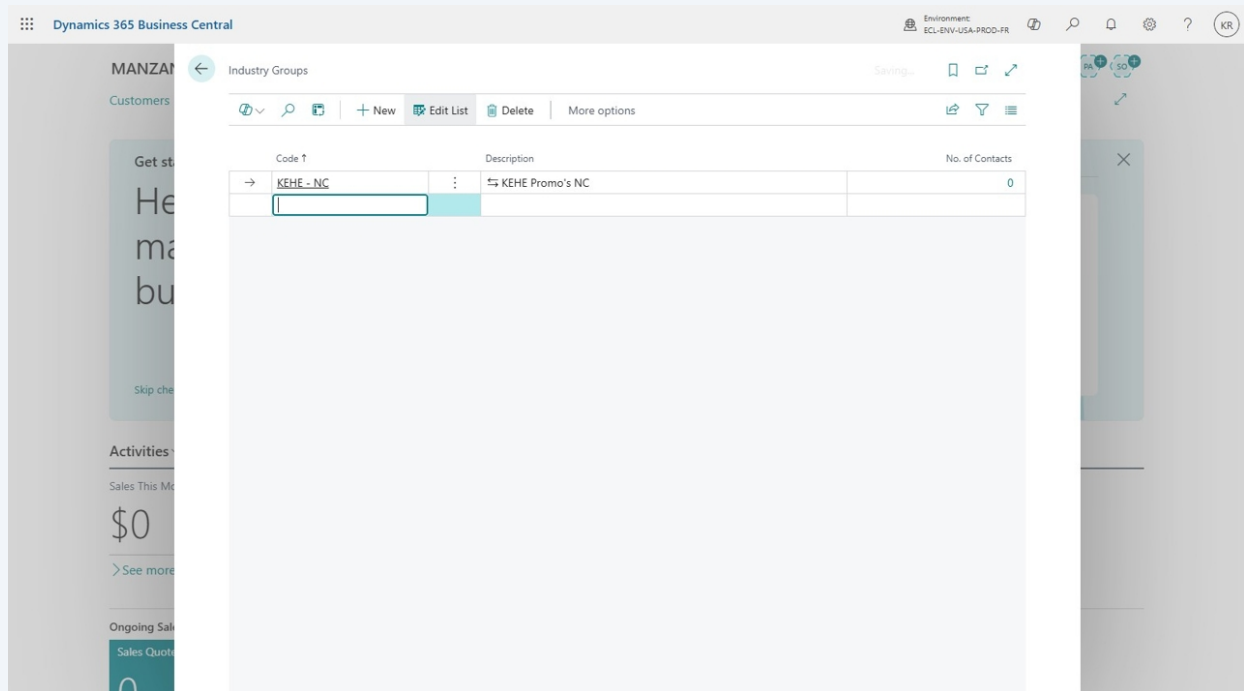
3 In this case no Industry groups have been created yet - Click "New"



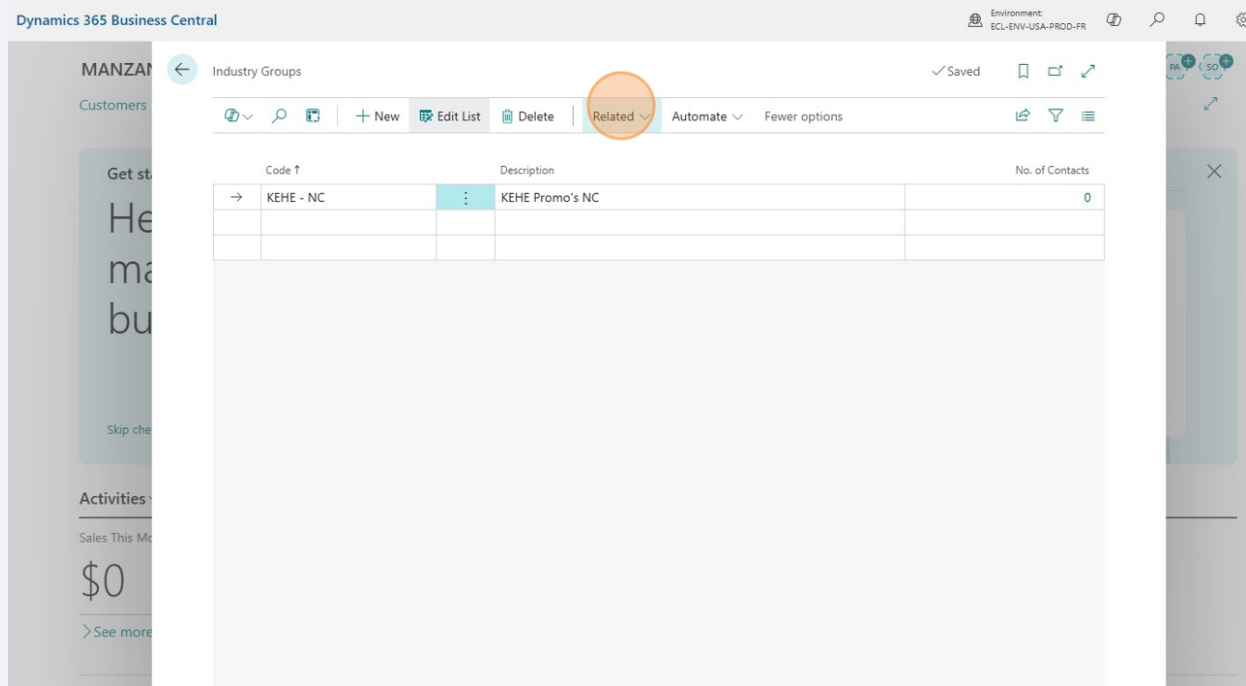
4 Type the name of the group you want to create, in this example: "KEHE - NC"



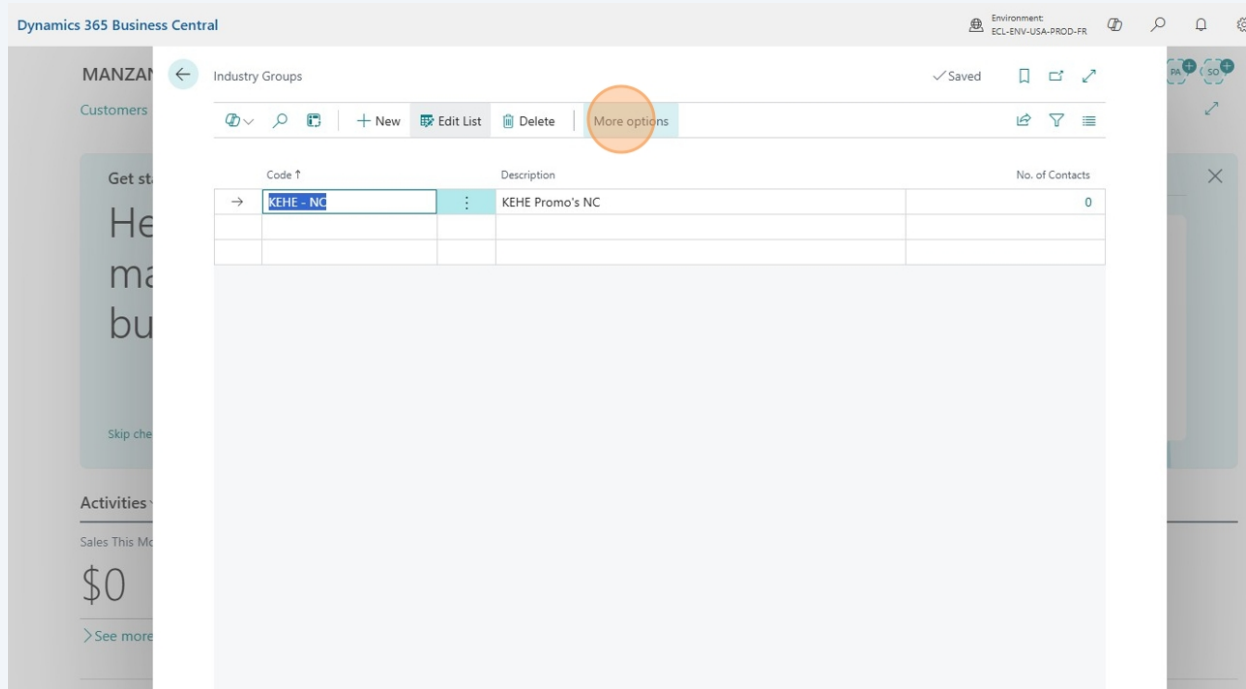
5 Type "KEHE Promo's NC Enter"



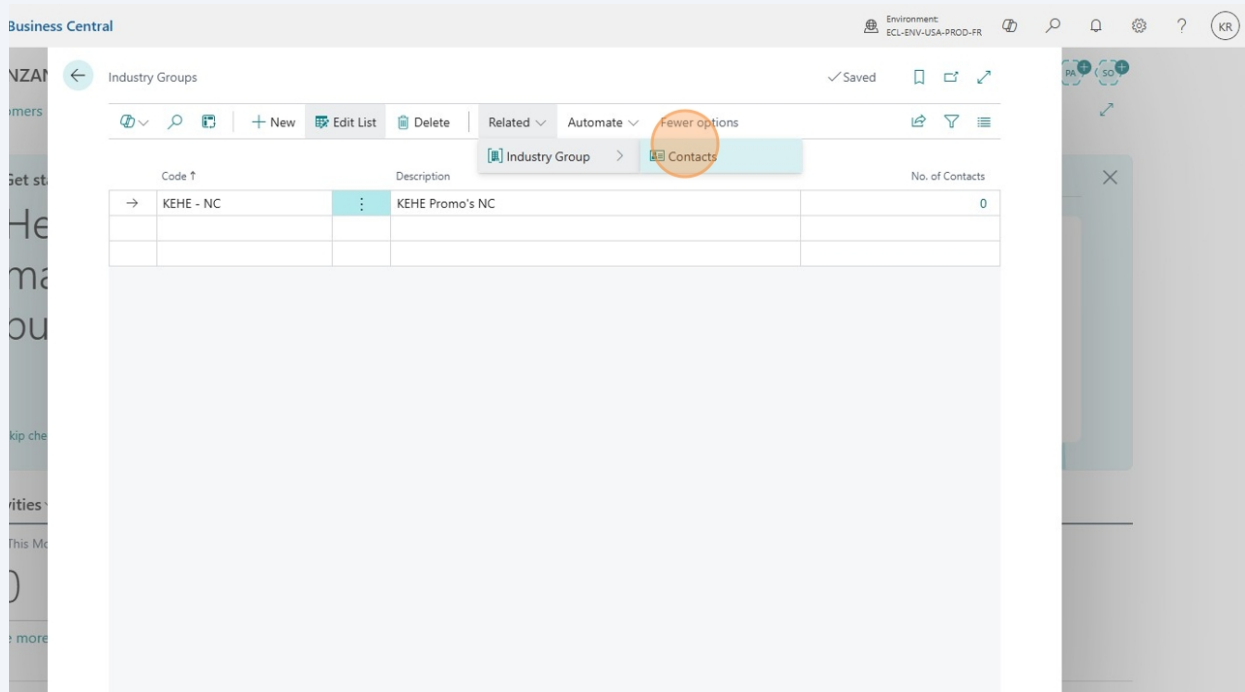
6 Next step is to assign the Contacts to this industry group - Click "Related"



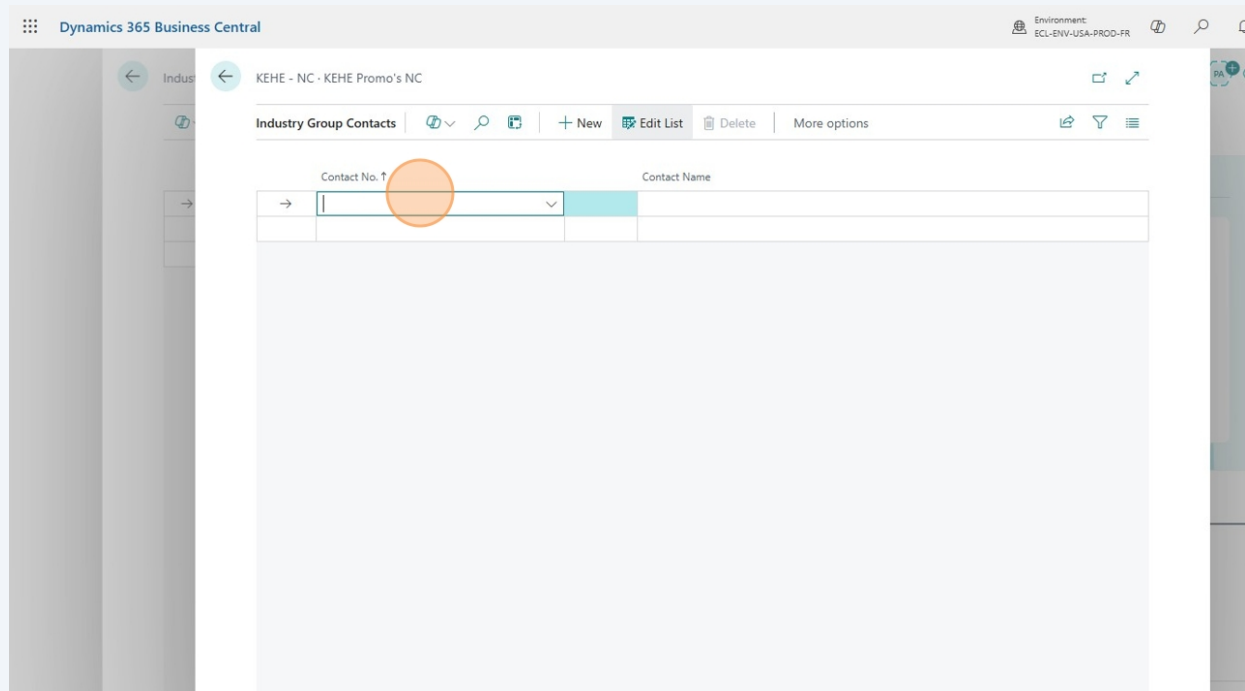
7 Click "More options"



8 Click "Contacts"



9 There are no contacts added yet - Click this text field.



10

This is a section of an export file from BC of the Customer Master. It has been filtered to the Customer Price Group: KEHE - NC. This is the list that will be pasted into the page as the contacts assigned to the Industry group KEHE NC

No.	Name	Customer Price Group	Bill-to Customer N	Primary Contact N
C00228	KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN	KEHE - NC	C00215	CT000089
C00229	KEHE DISTRIBUTORS - NCOAST - AURORA DC# 12	KEHE - NC	C00215	CT000090
C00231	KEHE DISTRIBUTORS - NCOAST - BREINIGSVILLE DC# 15	KEHE - NC	C00215	CT000091
C00233	KEHE DISTRIBUTORS - NCOAST - DOUGLASVILLE DC# 55	KEHE - NC	C00215	CT000092
C00234	KEHE DISTRIBUTORS - NCOAST - ELKTON DC# 01	KEHE - NC	C00215	CT000093
C00236	KEHE DISTRIBUTORS - NCOAST - PORTLAND DC# 25	KEHE - NC	C00215	CT000094
C00237	KEHE DISTRIBUTORS - NCOAST - ROMEOVILLE DC# 18	KEHE - NC	C00215	CT000095
C00238	KEHE DISTRIBUTORS - NCOAST - STOCKTON DC# 33	KEHE - NC	C00215	CT000096
C00649	KEHE DISTRIBUTORS - NCOAST - NORTH EAST DC# 27	KEHE - NC	C00215	CT000284
C00747	KEHE DISTRIBUTORS - NCOAST - ELLETTSVILLE DC# 16	KEHE - NC	C00215	CT000313
C00795	KEHE DISTRIBUTORS - NCOAST - GOODYEAR DC# 14	KEHE - NC	C00215	CT000345
C00819	KEHE DISTRIBUTORS - NCOAST - DALLAS DC# 19	KEHE - NC	C00215	CT000364
C00890	KEHE DISTRIBUTORS - NCOAST - CHICAGO	KEHE - NC	C00215	CT000452
C00927	KEHE DISTRIBUTORS - NCOAST - HIALEAH DC# 31	KEHE - NC	C00215	CT000497
C00934	KEHE DISTRIBUTORS - NCOAST - TUALATIN DC# 46	KEHE - NC	C00215	CT000506
C00935	KEHE DISTRIBUTORS - NCOAST - ONTARIO DC# 45	KEHE - NC	C00215	CT000507
C00950	KEHE DISTRIBUTORS - NCOAST - TAMPA DC# 01	KEHE - NC	C00215	CT000527
C01039	KEHE DISTRIBUTORS - NCOAST - NASHVILLE	KEHE - NC	C00215	CT001488

11

The list below is copied in from the grouping of customers that belong to the Customer Price Group "Kehe - NC"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

KEHE - NC - KEHE Promo's NC

Industry Group Contacts

✓ Saved

+

New

Edit List

Delete

More options

Contact No. ↑	Contact Name
CT000089	KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN
CT000090	KEHE DISTRIBUTORS - NCOAST - AURORA DC# 12
CT000091	KEHE DISTRIBUTORS - NCOAST - BREINIGSVILLE DC# 15
CT000092	KEHE DISTRIBUTORS - NCOAST - DOUGLASVILLE DC# 55
CT000093	KEHE DISTRIBUTORS - NCOAST - ELKTON DC# 01
CT000094	KEHE DISTRIBUTORS - NCOAST - PORTLAND DC# 25
CT000095	KEHE DISTRIBUTORS - NCOAST - ROMEOVILLE DC# 18
CT000096	KEHE DISTRIBUTORS - NCOAST - STOCKTON DC# 33
CT000284	KEHE DISTRIBUTORS - NCOAST - NORTH EAST DC# 27
CT000313	KEHE DISTRIBUTORS - NCOAST - ELLETTSVILLE DC# 16
CT000345	KEHE DISTRIBUTORS - NCOAST - GOODYEAR DC# 14
CT000364	KEHE DISTRIBUTORS - NCOAST - DALLAS DC# 19
CT000452	KEHE DISTRIBUTORS - NCOAST - CHICAGO
CT000497	KEHE DISTRIBUTORS - NCOAST - HIALEAH DC# 31
CT000506	KEHE DISTRIBUTORS - NCOAST - TUALATIN DC# 46
CT000507	KEHE DISTRIBUTORS - NCOAST - ONTARIO DC# 45
CT000527	KEHE DISTRIBUTORS - NCOAST - TAMPA DC# 01
CT001488	KEHE DISTRIBUTORS - NCOAST - NASHVILLE

12 Refresh the page and the number of added contacts is visible - Click the link "18"

Business Central

Environment: ECL-ENV-USA-PROD-FR

Industry Groups

✓ Saved

+ New Edit List Delete Related Automate Fewer options

Code ↑	Description	No. of Contacts
→ KEHE - NC	KEHE Promo's NC	18

13 Review the list of added contacts.

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

KEHE - NC - KEHE Promo's NC

Industry Group Contacts

+ New Edit List Delete More options

Contact No. ↑	Contact Name
→ CT000088	KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN
CT000090	KEHE DISTRIBUTORS - NCOAST - AURORA DC# 12
CT000091	KEHE DISTRIBUTORS - NCOAST - BREINIGSVILLE DC# 15
CT000092	KEHE DISTRIBUTORS - NCOAST - DOUGLASVILLE DC# 55
CT000093	KEHE DISTRIBUTORS - NCOAST - ELKTON DC# 01
CT000094	KEHE DISTRIBUTORS - NCOAST - PORTLAND DC# 25
CT000095	KEHE DISTRIBUTORS - NCOAST - ROMEOVILLE DC# 18
CT000096	KEHE DISTRIBUTORS - NCOAST - STOCKTON DC# 33
CT000284	KEHE DISTRIBUTORS - NCOAST - NORTH EAST DC# 27
CT000313	KEHE DISTRIBUTORS - NCOAST - ELLETTSVILLE DC# 16
CT000345	KEHE DISTRIBUTORS - NCOAST - GOODYEAR DC# 14
CT000364	KEHE DISTRIBUTORS - NCOAST - DALLAS DC# 19
CT000452	KEHE DISTRIBUTORS - NCOAST - CHICAGO
CT000497	KEHE DISTRIBUTORS - NCOAST - HIALEAH DC# 31
CT000506	KEHE DISTRIBUTORS - NCOAST - TUALATIN DC# 46
CT000507	KEHE DISTRIBUTORS - NCOAST - ONTARIO DC# 45
CT000527	KEHE DISTRIBUTORS - NCOAST - TAMPA DC# 01
CT001488	KEHE DISTRIBUTORS - NCOAST - NASHVILLE

14

Next: How to add a new contact to an existing industry group from the customer card - From the Main screen Click "Customers"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

MANZANA PRODUCTS CO., INC. | Finance | Cash Management | Sales | Purchasing | Popdock | ForNAV | Shopify

Customers | Vendors | Items | Bank Accounts | Chart of Accounts | Item Tracking Info Status | Production BOMs

Get started

Here are a few steps that make you ready for business

Skip checklist

Your checklist:

1. A first look around
2. **Company details**
3. Update users
4. User permissions
5. User settings
6. Outgoing email

Enter company details

Provide your company's name, address, logo, and other basic information.

3 minutes

Start Skip for now

Activities

Sales This Month: \$0 > See more

Overdue Sales Invoice Amount: \$0 > See more

Overdue Purch. Invoice Amount: \$0 > See more

Sales Invoices Predicted Overdue: 0 > See more

15

Search up a Kehe - NC customer for this example Click "C00228"

Q No. ↑	Q Name	Customer Hierarchy Code	Q Bill-to Customer No.	Q Customer Price Group	Q Payment Terms Code	Q Location Code	Q Phone No.	Q Co
C00201	KEHE - CADIA - CHINO DC# 41	C00201	C00215	KEHE - PL	NET 35	GREEN		
C00203	KEHE - CADIA - PORTLAND DC# 25	C00203	C00215	KEHE - PL	NET 35	GREEN		
C00204	KEHE - CADIA - STOCKTON DC# 33	C00204	C00215	KEHE - PL	NET 35	GREEN		
C00209	KEHE - SPROUTS - AURORA DC# 12	C00209	C00215	KEHE - PL	30D(15D)2	GREEN		
C00210	KEHE - SPROUTS - CHINO DC# 41	C00210	C00215	KEHE - PL	30D(15D)2	GREEN		
C00211	KEHE - SPROUTS - DOUGLASVILLE DC# 55	C00211	C00215	KEHE - PL	30D(15D)2	GREEN		
C00213	KEHE - SPROUTS - STOCKTON DC# 33	C00213	C00215	KEHE - PL	30D(15D)2	GREEN		
C00215	KEHE DISTRIBUTORS		C00215			GREEN		
C00224	KEHE - CADIA - ROMEOVILLE	C00224	C00215	KEHE - PL	NET 35	GREEN		
C00228	KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN	C00228	C00215	KEHE - NC	30D(15D)2	GREEN		
C00229	KEHE DISTRIBUTORS - NCOAST - AURORA DC# 12	C00229	C00215	KEHE - NC	30D(15D)2	GREEN		
C00231	KEHE DISTRIBUTORS - NCOAST - BREINIGSVILLE DC# 15	C00231	C00215	KEHE - NC	30D(15D)2	GREEN		
C00233	KEHE DISTRIBUTORS - NCOAST - DOUGLASVILLE DC# 55	C00233	C00215	KEHE - NC	30D(15D)2	GREEN		
C00234	KEHE DISTRIBUTORS - NCOAST - ELKTON DC# 01	C00234	C00215	KEHE - NC	30D(15D)2	GREEN		
C00236	KEHE DISTRIBUTORS - NCOAST - PORTLAND DC# 25	C00236	C00215	KEHE - NC	30D(15D)2	GREEN		
C00237	KEHE DISTRIBUTORS - NCOAST - ROMEOVILLE DC# 18	C00237	C00215	KEHE - NC	30D(15D)2	GREEN		
C00238	KEHE DISTRIBUTORS - NCOAST - STOCKTON DC# 33	C00238	C00215	KEHE - NC	30D(15D)2	GREEN		
C00649	KEHE DISTRIBUTORS - NCOAST - NORTH EAST DC# 27	C00649	C00215	KEHE - NC	30D(15D)2	GREEN		
C00746	KEHE - CADIA - ELLETTSVILLE DC# 16	C00746	C00215	KEHE - PL	NET 35	GREEN		
C00747	KEHE DISTRIBUTORS - NCOAST - ELLETTSVILLE DC# 16	C00747	C00215	KEHE - NC	30D(15D)2	GREEN		

16 In the Customer Card - Click "Contact"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Customer Card

C00228 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN

Home Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Yaveon 365 Price Info **Contact** Apply Template Merge With... Send Email Pop-up Notes Yaveon 365 Customer Hierarchy Structure

General Show more

No. C00228 Customer Hierarchy Code C00228

Name KEHE DISTRIBUTORS - NCOAST - CH Sell only listed Items ☒

Balance (\$) 0.00 Chain Name

Balance (\$) As Vendor 0.00 Total Sales - Fiscal Year 0.00

Balance Due (\$) 0.00 Costs (\$) 0.00

Credit Limit (\$) 0.00 Pop-up Notes No

Blocked CD Customer Layout Group

Company Group Code

Address & Contact Show more

Address Phone No.

Address 16081 FERN AVE. Mobile Phone No.

Summary Preview

Copilot uses AI to gather valuable insights from you already have access to.

See terms | Learn more

Start summarizing

Details Attachments (0)

Customer Picture

17 Click "Edit"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

CT000089 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN

Contacts New Manage Home Contact Prices & Discounts Actions Related Reports Automate Fewer options

Edit View Delete

No.	Name ↑	Company Name ↑	Contact Business Relation	Phone No.	Email
CT000089	KEHE DISTRIBUTORS - NCO...	KEHE DISTRIBUTORS - NCOAST...	Customer		aptradeinvoices@kehe.com

Details Attachments (0)

Contact Statistics

General

Cost (\$)

Duration (Min.)

Opportunities

No. of Opportunities

Estimated Value (\$)

Calcd. Current Value (\$)

Segmentation

No. of Job Responsibilities

No. of Industry Groups

No. of Business Relations

No. of Mailing Groups

Recurring Billing

0 0

Customer

18 Click "Contact"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Contact Card

CT000089 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN

Home Contact Prices & Discounts Report Actions Related Reports Automate Fewer options

Create Opportunity Create Interaction Create Sales Order

General

No. CT000089

Name KEHE DISTRIBUTORS - NCOAS

Type Company

Company Name KEHE DISTRIBUTORS - NCO

Business Relation Customer

Salesperson Code ACOSTA

History Manage Functions

Show Attachments Create Interaction Create Opportunity Comments New Line Delete Line

Interaction Salesperson Code Description Attach... Comm... Opportunity No. Campaign No.

(There is nothing to show in this view)

Summary Preview

Details Attachments (0)

Contact Picture

Contact Statistics

General

Cost (\$)

Duration (Min.)

19 Click "Related"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Contact Card

CT000089 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN

Home Contact Prices & Discounts Report Actions Related Reports Automate Fewer options

Create Opportunity Create Interaction Create Sales Quote Apply Template...

General

No. CT000089

Name KEHE DISTRIBUTORS - NCOAS

Type Company

Company No. CT000089

Company Name KEHE DISTRIBUTORS - NCO

Business Relation Customer

Salesperson Code ACOSTA

History Manage Functions

Show Attachments Create Interaction Create Opportunity Comments New Line Delete Line

Interaction Salesperson Code Description Attach... Comm... Opportunity No. Campaign No.

(There is nothing to show in this view)

Summary Preview

Details Attachments (0)

Contact Picture

Contact Statistics

General

Cost (\$)

Duration (Min.)

20 Click "Company"

The screenshot shows the 'Contact Card' for 'CT000089 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN'. The 'Related' dropdown menu is open, and the 'Company' option is highlighted. The 'General' tab is active, showing fields for 'No.', 'Name', and 'Type'. The 'Business Relations' section shows 'Company Name', 'Business Relation', and 'Salesperson Code'. The 'History' section is empty. The 'Contact Picture' and 'Contact Statistics' sections are also visible.

Environment: ECL-ENV-USA-PROD-FR

Contact Card

CT000089 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN

Home Contact Prices & Discounts Report Actions Related Reports Automate Fewer options

Create Opportunity Create Interaction Create Sale

General

No. CT000089

Name KEHE DISTRIBUTORS - NCOAST

Type Company

Related Information Person Alternative Address Other

Business Relations

Company Name KEHE DISTRIBUTORS - NCOAST

Business Relation Customer

Salesperson Code ACOSTA

History Manage Functions

Show Attachments Create Interaction Create Opportunity Comments New Line Delete Line

Interaction Salesperson Code Description Attach... Comm... Opportunity No. Campaign No.

(There is nothing to show in this view)

Summary Preview

Details Attachments (0)

Contact Picture

Contact Statistics

General

Cost (\$) 0.00

Duration (Min.) 0

21 Click "Industry Groups"

The screenshot shows the 'Contact Card' for 'CT000089 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN'. The 'Related' dropdown menu is open, and the 'Industry Groups' option is highlighted. The 'General' tab is active, showing fields for 'No.', 'Name', and 'Type'. The 'Business Relations' section shows 'Company Name', 'Business Relation', and 'Salesperson Code'. The 'History' section is empty. The 'Contact Picture' and 'Contact Statistics' sections are also visible.

Environment: ECL-ENV-USA-PROD-FR

Business Central

Contact Card

CT000089 · KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN

Contact Prices & Discounts Report Actions Related Reports Automate Fewer options

Create Opportunity Create Interaction Create Sale

General

No. CT000089

Name KEHE DISTRIBUTORS - NCOAST

Type Company

Related Information Person Alternative Address Other

Business Relations

Company Name KEHE DISTRIBUTORS - NCOAST

Business Relation Customer

Salesperson Code ACOSTA

History Manage Functions

Show Attachments Create Interaction Create Opportunity Comments New Line Delete Line

Interaction Salesperson Code Description Attach... Comm... Opportunity No. Campaign No.

(There is nothing to show in this view)

Summary Preview

Details Attachments (0)

Contact Picture

Contact Statistics

General

Cost (\$) 0.00

Duration (Min.) 0

22

In this example the Industry group is already maintained for the contact. Had that not been the case, it can be added here. Click here.

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes a back arrow (highlighted with a red circle), the contact name 'CT000089 - KEHE DISTRIBUTORS - NCOAST - CHINO DC# 41- FERN', and a 'Saved' status. Below the navigation bar is the 'Contact Industry Groups' table. The table has two columns: 'Industry Group Code' and 'Industry Group Description'. The first row contains the value 'KEHE - NC' in the code column and 'KEHE Promo's NC' in the description column. The table also includes action buttons: '+ New', 'Edit List', 'Delete', and 'More options'.



Alert! If a Customer has more than one Contact, it will be the Contact type = Company that has to be assigned to the Industry Group. This unfortunately makes it a bit more cumbersome to identify the contact number and the assignment will have to be done manually. Choose the Contact number in BOLD

23

The industry group has been created and is ready to be used for promo's.