

Update Item Listing on Customers in Business Central

Adding an item to a customer in BC is a two-step process:

- Add the item to the Item Listing, which is maintained through the Customer Hierarchy.
- Add the item to the Sales Price table, which is maintained for the Customer Price Group.

Note: For simplicity, the Customer Hierarchy and the Customer Price Group use the same name.

1

To review what items are maintained for this customer, Go to: Related -> Yaveon 365 Trade -> Listing

The screenshot displays the 'Customer Card' for 'NAPA VALLEY DISTRIBUTORS' in the Yaveon 365 Business Central system. The interface includes a top navigation bar with tabs like 'Home', 'Request Approval', 'New Document', 'Prices & Discounts', 'Customer', 'Report', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. The 'Related' menu is expanded, showing options such as 'Customer', 'History', 'Prices & Discounts', 'Yaveon 365 Trade' (highlighted with an orange circle), 'Sales', 'Documents', 'Service', 'Vendor Scorecard', 'EDI', 'Yaveon 365 Customer Hierarchy Structure', 'Yaveon 365 Surcharges/Discounts', 'Assigned Customers (Bonus)', 'Recipients of Commission', 'Listing' (with a value of 2,608.32), 'Customer Hierarchy', and 'Other'. The main content area shows fields for 'Name', 'Balance (\$)', 'Balance (\$ As Vendor)', 'Overdue Balance (\$)', 'Credit Limit (\$)', 'Locked', 'Company Group Code', 'Address', 'Mobile Phone No.', 'Email', and 'Fax No.'. A 'Summary' panel on the right provides an overview of the customer's data and a 'Start summarizing' button.

2

If an item is not listed here, the item will need to be maintained in the Customer Hierarchy for this customer.

General

Sales Type Filter: Customer Starting Date Filter:

Sales Code Filter: C00297 Ending Date Filter:

Sales Code Name: NAPA VALLEY DISTRIBUTORS Item Filter:

Assortment Filter:

Manage Copy Listing Entries

Deactivated	Sales Type	Sales Code	Sales Code Name	Assortment Code	Item No.	Item Description	Item Group Code	Starting Date
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100539	NCOAST M.O.B JCE 24/100Z	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100542	NCOAST M.O.HC JCE 6/32OZ	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100544	NCOAST M.O.G JCE 6/32OZ	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100589	NCOAST M.O.B SCE 12/24OZ #2	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100593	NCOAST M.O.G SCE 12/24OZ	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		102247	NCOAST M.O.B SCE 6/4/3.2OZ	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		102804	NCOAST M.O.B CDR 8/64OZ - PET	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		102935	NCOAST M.O.SBEE SCE 6/24OZ	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103061	NCOAST M.O.B JCE 4/96OZ	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103080	NCOAST M.O.HC JCE 8/64OZ - REC...	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103195	NCOAST M.O.HC SCE 6/24OZ	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103206	NCOAST M.O.B JCE 8/64OZ - RECT ...	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103215	NCOAST M.O.B CDR 8/64OZ - RECT...	—	
→ ☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103218	NCOAST M.O.HC CDR 8/64OZ - RE...	—	
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100752	NCOAST M.O.B SCE 6/24OZ	—	

3

Switch to tab Customer Hierarchy (PROD)"

4

In the Customer Hierarchy page Click the "Search" field and search up the Customer Hierarchy for the customer

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Customer Hierarchy

Search

+ New Manage Assignment Yaveon 365 Price and Discounts More options

Code	Upper Level Hierarchy Code	Description	Address	Address 2	Post Code	City	Country/Regi... Code	County	Ph
MAN DEL		MANZANA SAMPLES SUPPLY ...							
C00021	MAN DEL	MANZANA SAMPLES - SUPP...							
C00273	MAN DEL	MANZANA - VINEGAR DEPT ...							
C00275	MAN DEL	MANZANA SAMPLES - SALES							
C00973	MAN DEL	MANZANA SAMPLES - SALE...							
MAN PU		MANZANA DONATIONS ONLY							
C00001	MAN PU	MANZANA DONATIONS ONLY							
C00011	MAN PU	MANZANA DONATIONS ON...							
C00012	MAN PU	MANZANA DONATIONS ON...							
MAN QA PU		MANZANA QA DEPT							
C00274	MAN QA PU	MANZANA QA DEPT							
MAR PU		MARUKAN BULK							
C00717	MAR PU	MARUKAN VINEGAR (USA) I...							
C00718	MAR PU	MARUKAN VINEGAR (CALIF...							
NAPA VAL		NAPA VALLEY							
C00297	NAPA VAL	NAPA VALLEY DISTRIBUTORS							

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In this example: Type "napa"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Customer Hierarchy

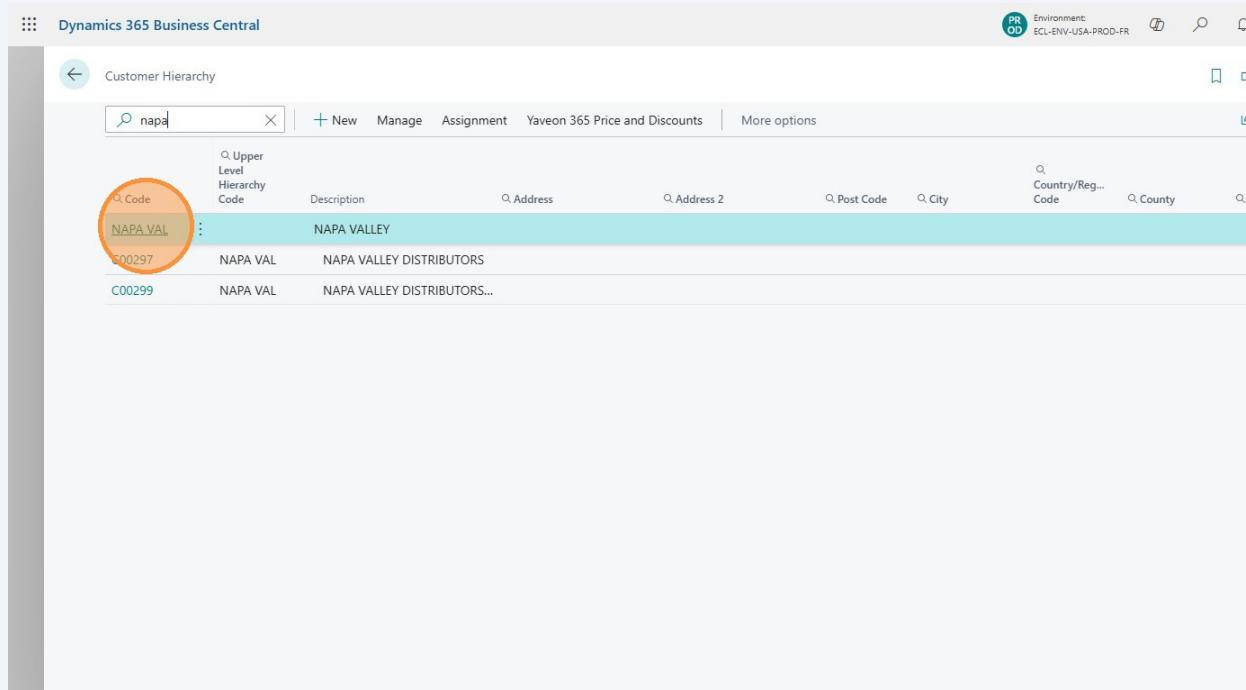
napa

+ New Manage Assignment Yaveon 365 Price and Discounts More options

Code	Upper Level Hierarchy Code	Description	Address	Address 2	Post Code	City	Country/Regi... Code	County	Phone No
NAPA VAL		NAPA VALLEY							
C00297	NAPA VAL	NAPA VALLEY DISTRIBUTORS							
C00299	NAPA VAL	NAPA VALLEY DISTRIBUTORS...							

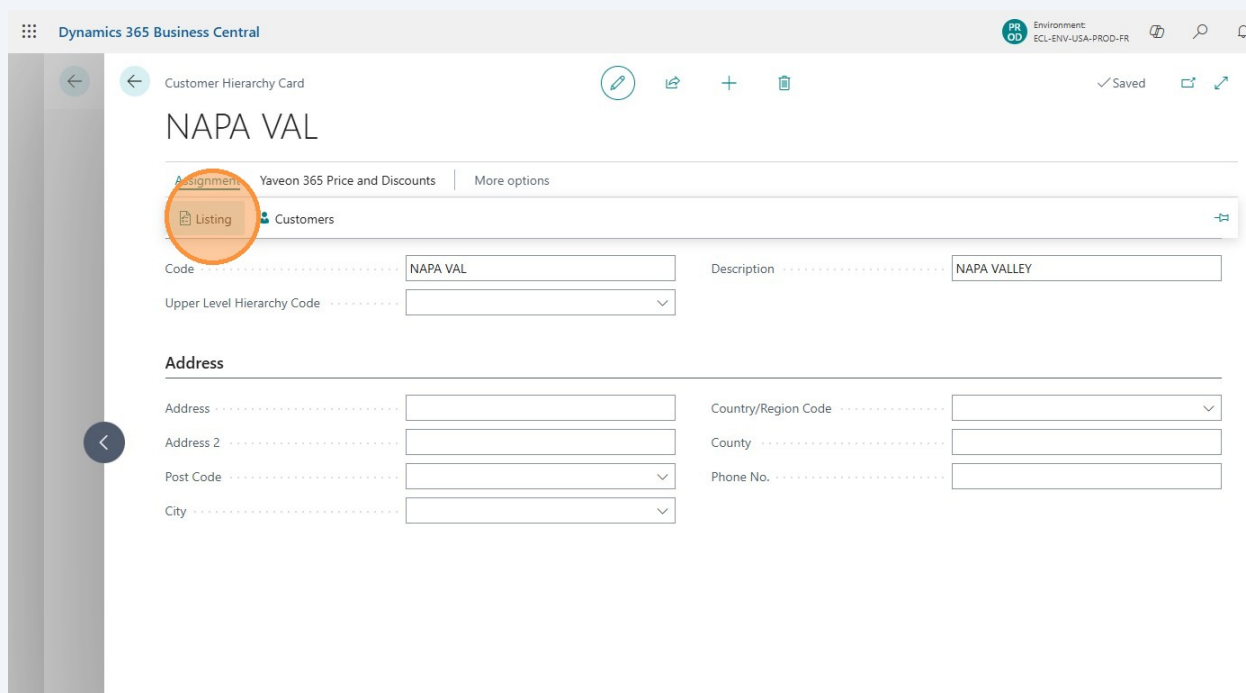
6

The NAPA VALLEY customer hierarchy consists of a parent code, **NAPA VAL**, with two customers linked to it. To maintain item listings, updates only need to be made at the parent level, as all customers within the hierarchy will be automatically updated. To proceed, Click on NAPA VAL



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Click "Listing"



8 Click "Assignment"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Customer Hierarchy Card

NAPA VAL

Assignment | Napa 365 Price and Discounts | More options

General

Code: NAPA VAL Description: NAPA VALLEY

Upper Level Hierarchy Code:

Address

Address: Country/Region Code:

Address 2: County:

Post Code: Phone No.:

City:

9 Add any new item in this table. Click out once done.

Filter: Customer Hierarchy Starting Date Filter:

Item Filter: NAPA VAL Ending Date Filter:

Item Name: NAPA VALLEY Item Filter:

Item Filter:

Manage Copy Listing Entries

Selected	Sales Type	Sales Code	Sales Code Name	Assortment Code	Item No.	Item Description	Item Group Code	Starting Date	Ending Date
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100293	NCOAST M.O.B JCE 24/100Z	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100539	NCOAST M.O.B JCE 6/32OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100542	NCOAST M.O.HC JCE 6/32OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100544	NCOAST M.O.G JCE 6/32OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100589	NCOAST M.O.B SCE 12/24OZ #2	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100593	NCOAST M.O.G SCE 12/24OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		102247	NCOAST M.O.B SCE 6/4/3.2OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		102804	NCOAST M.O.B CDR 8/64OZ - PET	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		102935	NCOAST M.O.SBEE SCE 6/24OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103061	NCOAST M.O.B JCE 4/96OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103080	NCOAST M.O.HC JCE 8/64OZ - REC...	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103195	NCOAST M.O.HC SCE 6/24OZ	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103206	NCOAST M.O.B JCE 8/64OZ - RECT...	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		103215	NCOAST M.O.B CDR 8/64OZ - RECT...	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		105218	NCOAST M.O.HC CDR 8/64OZ - RE...	-		
☐	Customer Hi...	NAPA VAL	NAPA VALLEY		100752	NCOAST M.O.B SCE 6/24OZ	-		

10 Step 2 - Update the Sales price table

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 >

Activities >

This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$3,604,938	\$762,210	\$4,707,917	0
See more	See more	See more	See more

Ongoing Sales

Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
290	24	0	
See more	See more	See more	See more

Ongoing Purchases

Purchase Orders	Ongoing Purch. Invoices	Purch. Invoices... Next Week
341	2	29
See more	See more	See more

Payments

Unprocessed Payments	Average Collec... Days	Outstanding V... Invoices
0	10.2	256
See more	See more	See more

Scan documents

Create Incoming... from Camera

Incoming Documents

My Incoming Documents

0

[See more](#)

11 Type "sales pri"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

MANZANA PRODUCTS CO., INC. | Customers > Vendors > Items > Bank Accounts >

Activities >

Sales This Month

Sales This Month	Overdue Amount
\$3,604,938	\$762,210
See more	See more

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock
0	290	24
See more	See more	See more

Payments

Unprocessed Payments	Average Collec... Days	Outstanding V... Invoices
0	10.2	256
See more	See more	See more

Scan documents

Create Incoming... from Camera

Incoming Documents

My Incoming Documents

0

[See more](#)

Search for 'sales pri'

Go to Pages and Tasks

Go to Pages and Tasks	Lists	Tasks
> Sales Price Lists		
> Sales Price Worksheet		
> Yaveon 365 Sales Prices		

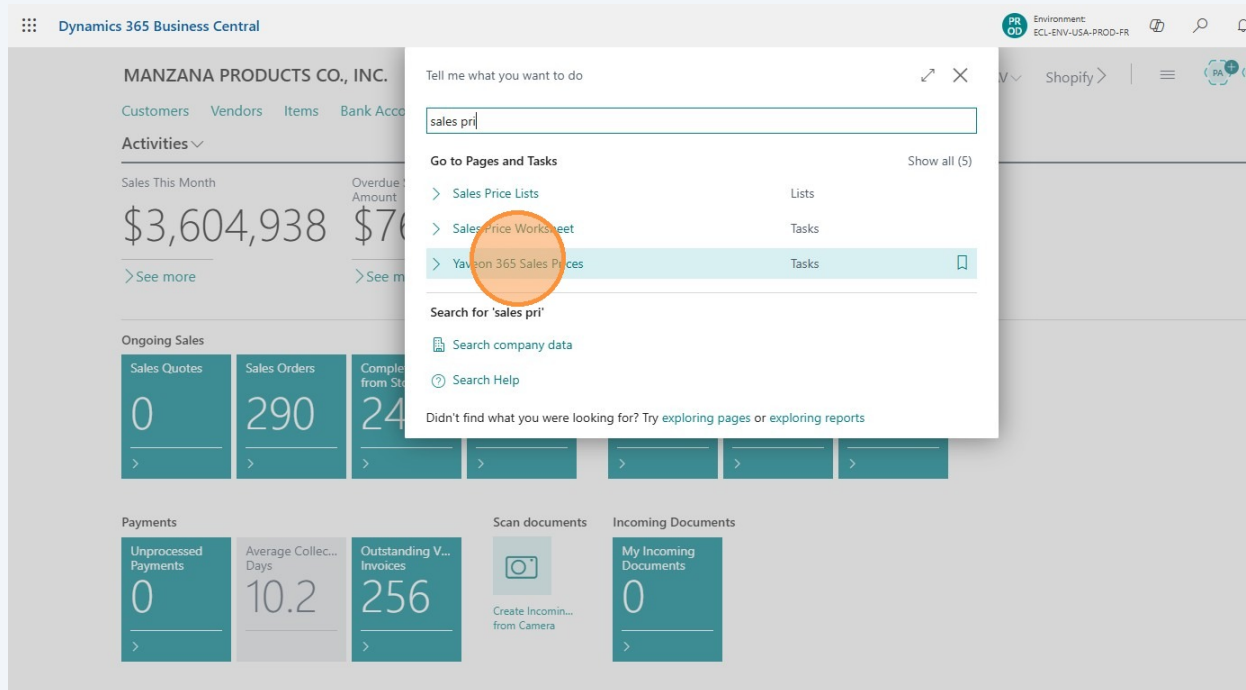
Search for 'sales pri'

Search company data

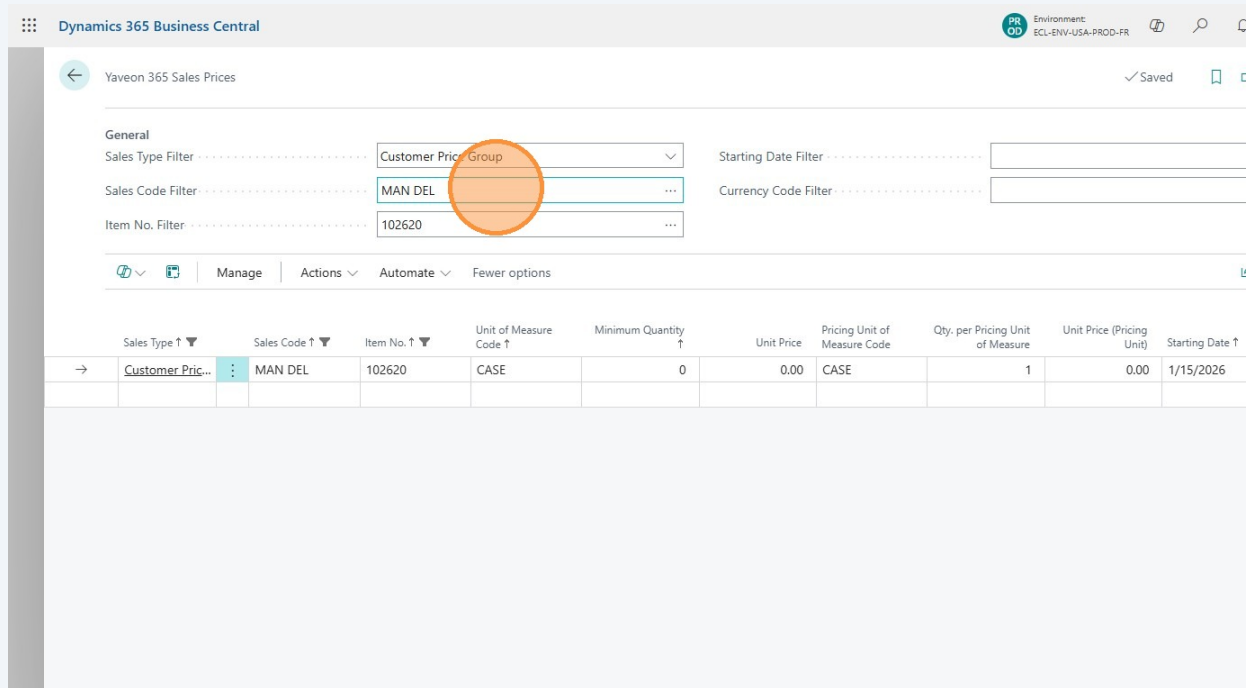
Search Help

Didn't find what you were looking for? Try exploring pages or exploring reports

12 Click "Yaveon 365 Sales Prices"

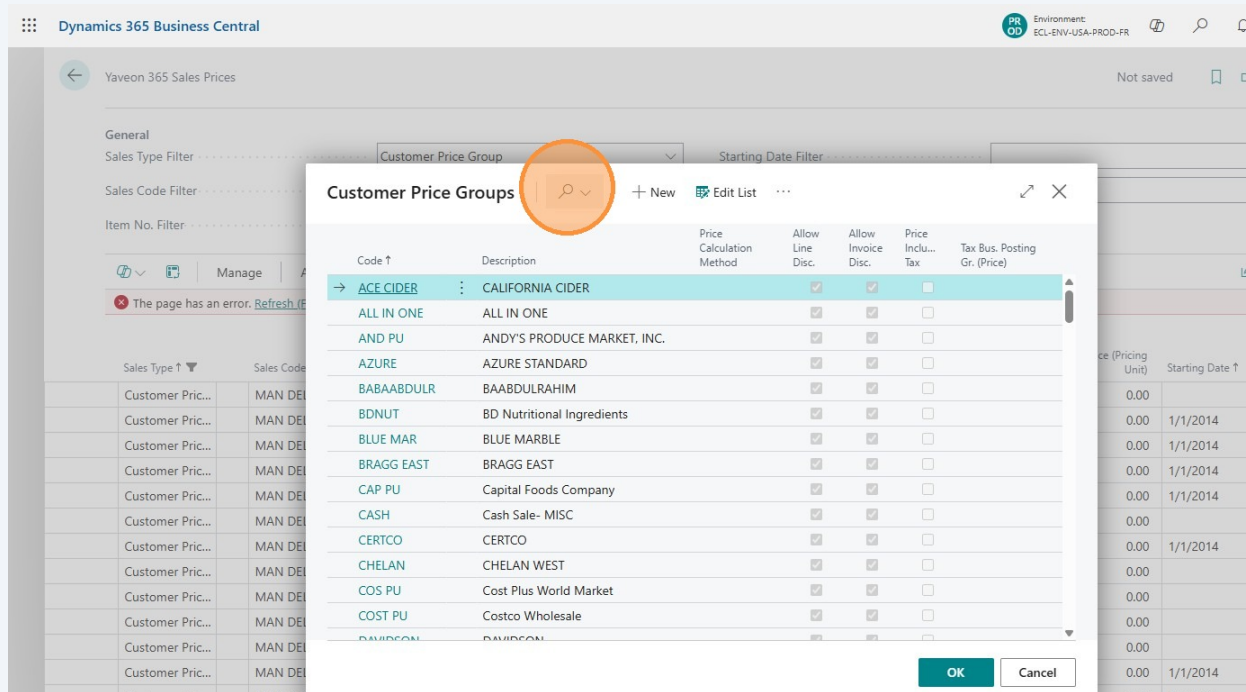


13 To search up a certain Customer Price Grp, Click the 3 dots in the Sales Code Filter field.



14

Customer Price Groups are named as the Customer Hierarchy for simplicity. To search - > Click the looking glass.

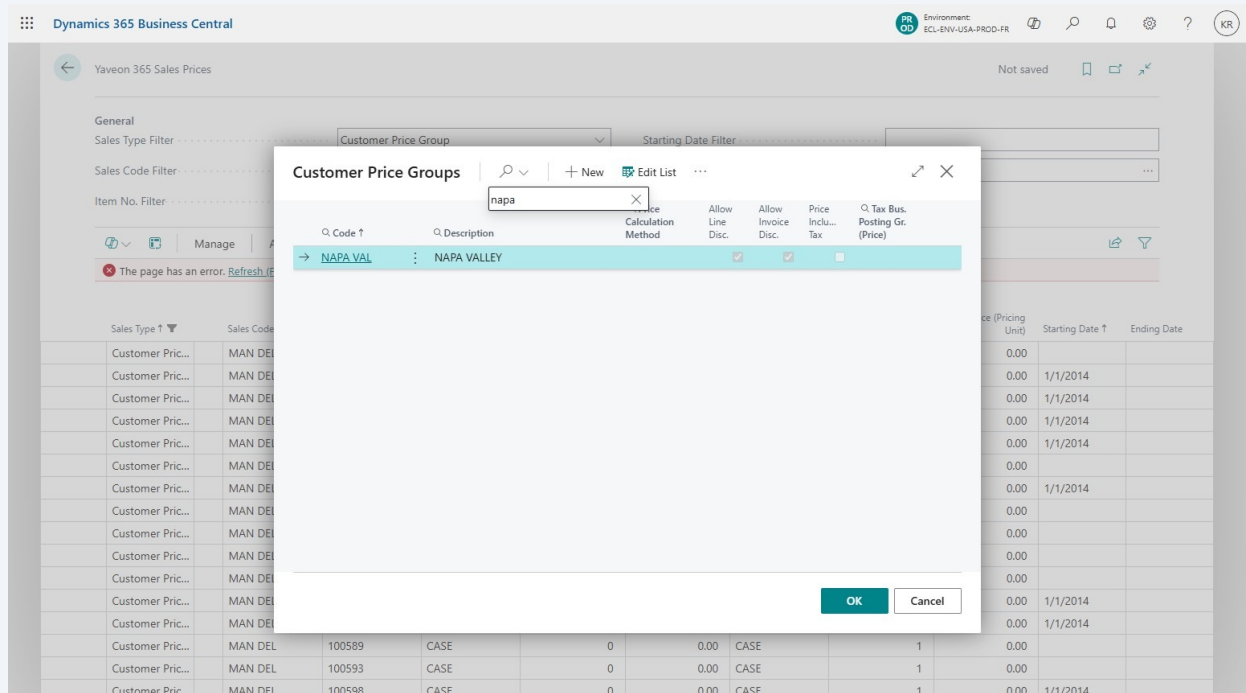


The screenshot shows the Dynamics 365 Business Central interface. The main window displays the 'Yaveon 365 Sales Prices' page. A modal dialog box titled 'Customer Price Groups' is open in the center. The dialog box has a search icon (a magnifying glass) in the top left corner, which is highlighted with an orange circle. The dialog box contains a table with the following columns: Code, Description, Price Calculation Method, Allow Line Disc., Allow Invoice Disc., Price Inclusion Tax, and Tax Bus. Posting Gr. (Price). The table lists several price groups, with 'ACE CIDER' (CALIFORNIA CIDER) selected. The background page shows a table of sales prices with columns for Sales Type, Sales Code, and Price.

Code	Description	Price Calculation Method	Allow Line Disc.	Allow Invoice Disc.	Price Inclusion Tax	Tax Bus. Posting Gr. (Price)
ACE CIDER	CALIFORNIA CIDER		☒	☒	☐	
ALL IN ONE	ALL IN ONE		☒	☒	☐	
AND PU	ANDY'S PRODUCE MARKET, INC.		☒	☒	☐	
AZURE	AZURE STANDARD		☒	☒	☐	
BABAABDULR	BAABDULRAHIM		☒	☒	☐	
BDNUT	BD Nutritional Ingredients		☒	☒	☐	
BLUE MAR	BLUE MARBLE		☒	☒	☐	
BRAGG EAST	BRAGG EAST		☒	☒	☐	
CAP PU	Capital Foods Company		☒	☒	☐	
CASH	Cash Sale- MISC		☒	☒	☐	
CERTCO	CERTCO		☒	☒	☐	
CHELAN	CHELAN WEST		☒	☒	☐	
COS PU	Cost Plus World Market		☒	☒	☐	
COST PU	Costco Wholesale		☒	☒	☐	
DAVISON	DAVISON		☒	☒	☐	

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Type "napa"



The screenshot shows the Dynamics 365 Business Central interface. The main window displays the 'Yaveon 365 Sales Prices' page. A modal dialog box titled 'Customer Price Groups' is open in the center. The dialog box has a search icon (a magnifying glass) in the top left corner. The search bar contains the text 'napa'. The dialog box contains a table with the following columns: Code, Description, Price Calculation Method, Allow Line Disc., Allow Invoice Disc., Price Inclusion Tax, and Tax Bus. Posting Gr. (Price). The table lists several price groups, with 'NAPA VAL' (NAPA VALLEY) selected. The background page shows a table of sales prices with columns for Sales Type, Sales Code, and Price.

Code	Description	Price Calculation Method	Allow Line Disc.	Allow Invoice Disc.	Price Inclusion Tax	Tax Bus. Posting Gr. (Price)
NAPA VAL	NAPA VALLEY		☒	☒	☐	

16 Click "NAPA VAL"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-PROD-FR

Yaveon 365 Sales Prices

Not saved

General

Sales Type Filter: Customer Price Group

Starting Date Filter:

Sales Code Filter:

Item No. Filter:

The page has an error. Refresh

Customer Price Groups

Search: napa

Code: NAPA VAL

Description: NAPA VALLEY

Allow Line Disc.:

Allow Invoice Disc.:

Price Includ. Tax:

Tax Bus. Posting Gr. (Price):

OK

Cancel

Price (Pricing Unit)	Starting Date
0.00	
0.00	1/1/2014
0.00	1/1/2014
0.00	1/1/2014
0.00	1/1/2014
0.00	1/1/2014
0.00	1/1/2014
0.00	
0.00	
0.00	
0.00	
0.00	1/1/2014
0.00	
0.00	
0.00	
0.00	
0.00	1/1/2014

17 Add any items with their sales prices and valid dates in this table

General

Sales Type Filter: Customer Price Group

Starting Date Filter:

Sales Code Filter: NAPA VAL

Currency Code Filter:

Item No. Filter:

Manage

Actions

Automate

Fewer options

Sales Type	Sales Code	Item No.	Unit of Measure Code	Minimum Quantity	Unit Price	Pricing Unit of Measure Code	Qty. per Pricing Unit of Measure	Unit Price (Pricing Unit)	Starting Date
Customer Pric...	NAPA VAL	100542	CASE	0	17.52	CASE	1	17.52	1/29/2024
Customer Pric...	NAPA VAL	100544	CASE	0	19.50	CASE	1	19.50	8/1/2022
Customer Pric...	NAPA VAL	100544	CASE	0	17.52	CASE	1	17.52	1/29/2024
Customer Pric...	NAPA VAL	100589	CASE	0	26.28	CASE	1	26.28	8/1/2022
Customer Pric...	NAPA VAL	100593	CASE	0	26.28	CASE	1	26.28	8/1/2022
Customer Pric...	NAPA VAL	100752	CASE	0	13.14	CASE	1	13.14	1/5/2026
Customer Pric...	NAPA VAL	102247	CASE	0	14.10	CASE	1	14.10	8/1/2022
Customer Pric...	NAPA VAL	102804	CASE	0	36.00	CASE	1	36.00	8/1/2022
Customer Pric...	NAPA VAL	102804	CASE	0	32.40	CASE	1	32.40	1/29/2024
Customer Pric...	NAPA VAL	102804	CASE	0	32.40	CASE	1	32.40	5/1/2025
Customer Pric...	NAPA VAL	102935	CASE	0	15.00	CASE	1	15.00	8/1/2022
Customer Pric...	NAPA VAL	103061	CASE	0	30.00	CASE	1	30.00	5/1/2024
Customer Pric...	NAPA VAL	103080	CASE	0	32.40	CASE	1	32.40	1/1/2025
Customer Pric...	NAPA VAL	103195	CASE	0	13.14	CASE	1	13.14	2/1/2025
Customer Pric...	NAPA VAL	103206	CASE	0	32.40	CASE	1	32.40	1/1/2025
Customer Pric...	NAPA VAL	103215	CASE	0	32.40	CASE	1	32.40	1/1/2025
Customer Pric...	NAPA VAL	103218	CASE	0	32.40	CASE	1	32.40	1/1/2025

18 That concludes the SCRIBE.