MICRO APPS

Relevant Items Only App

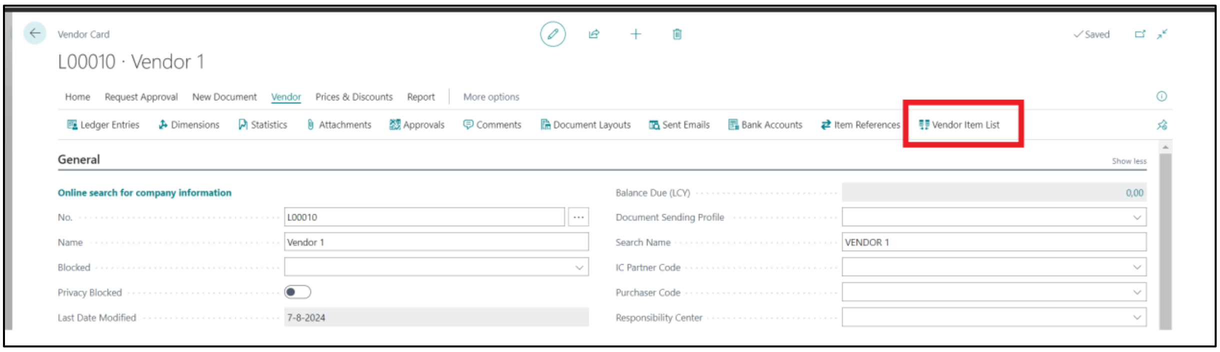
This document will describe all the necessary information for the use of the Relevant item only app, created by Micro-Apps. This extension creates the possibility only purchase or sell items that are connected to the vendor or customer

Installation:

The installation of the relevant items only app is available via the Microsoft Marketplace for Business Central extensions/apps. From here you can automatically install the extension and make it available within every company within your Business Central environment.

Vendor item list:

The vendor item list is the first step in using the Relevant Items Only app. Here, we determine which items or G/L accounts should be standard for a vendor. To access this list, go to the vendor card and navigate to Vendor > Vendor Item List.



In the vendor item list, we can add multiple lines for items or G/L accounts. The following options are available to fill in:

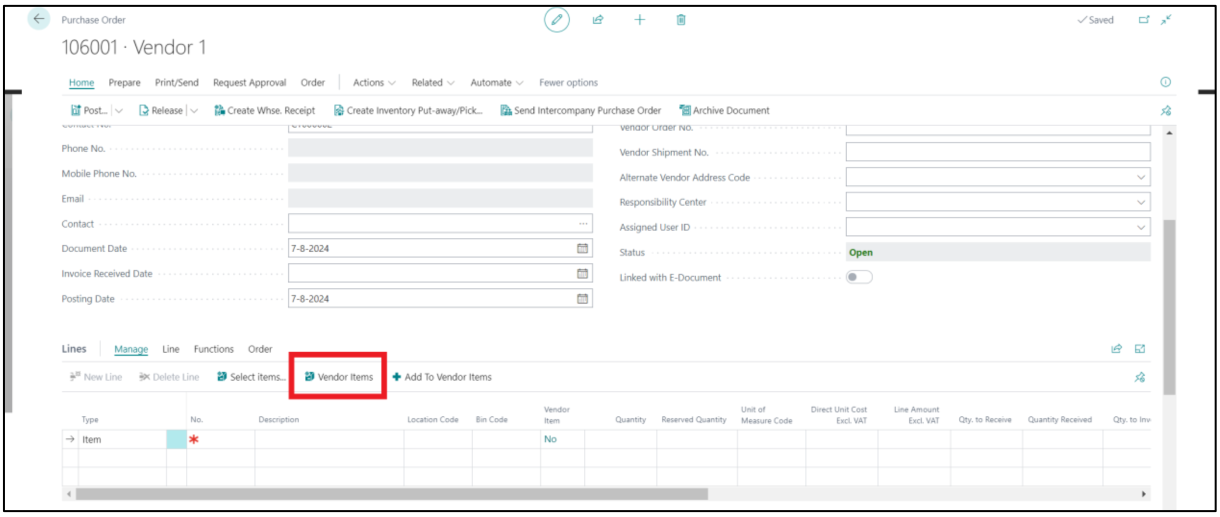
- **Item Type**: Choose what you want to add to the vendor item list.
  - Item
  - G/L Account
- **No.**: Enter the number of the item or G/L account.
- **Item Variant**: Specify the variant type of the item. This is not necessary for G/L accounts.
- **Unit of Measure Code**: Enter the unit of measure.
- **Description**: Provide a description of the item or G/L account.

There are two additional options for managing the list:

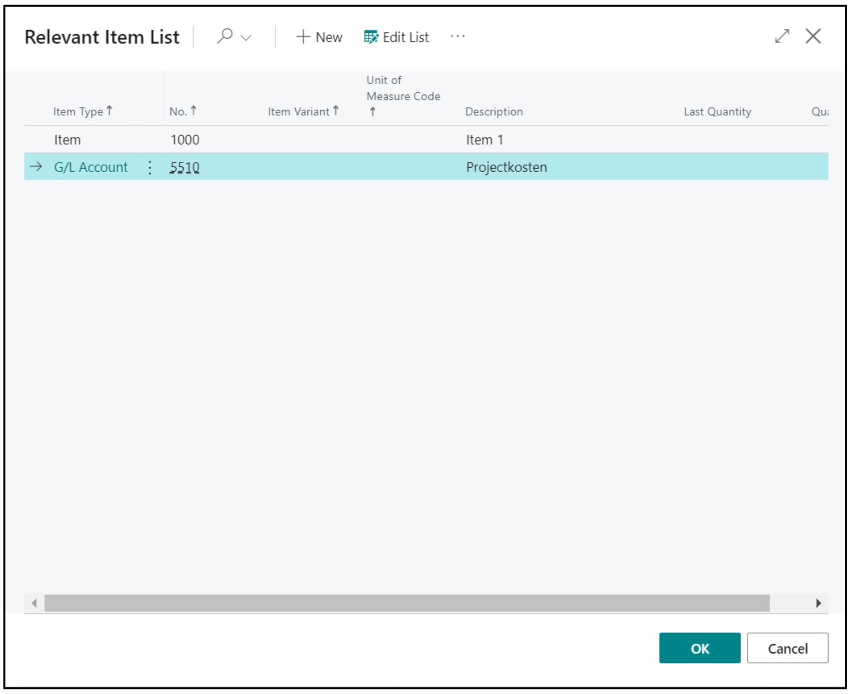
- **Copy Selected Lines**: Copy lines from one vendor to another.
- **Suggest Lines**: Add items using a filter. It is possible to filter by items and G/L accounts.

Purchase Order Guide

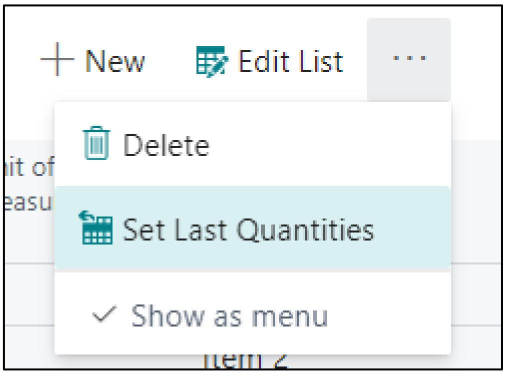
When creating a purchase order for a vendor with an established vendor item list, you can use the **"Vendor Items"** button to display all items specific to that vendor.



Upon pressing the **"Vendor Items"** button, a list of items from the vendor item list appears. Here, you can select one or multiple items to add to your order. The list also shows the last quantity purchased, and you can fill in the quantity field to automatically add the specified amount to the order.

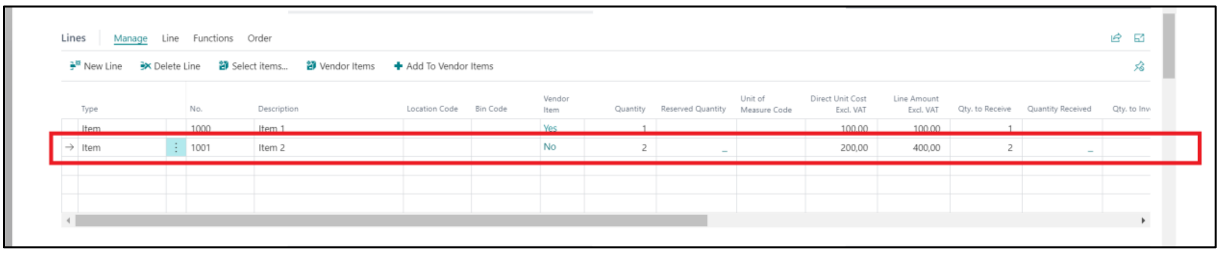


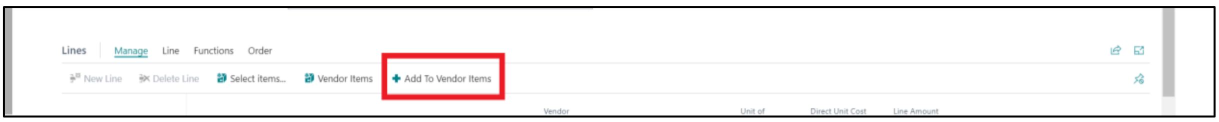
Additionally, in the **"Vendor Items"** list on the purchase order, you can use the **"Set Last Quantities"** button to add the last purchased quantities to the order in one step.



In the example below, we added Item 1 using the **"Vendor Items"** button, and it now appears on the order.

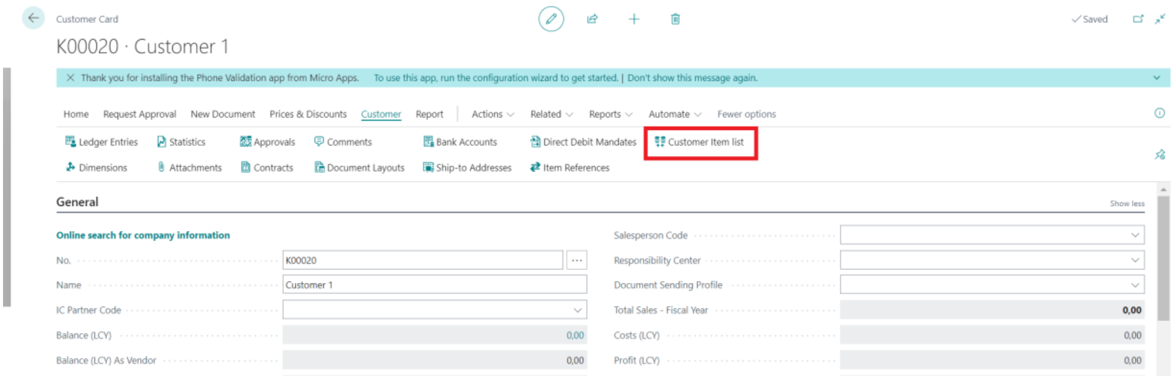
When adding a non-vendor item to the purchase order, you'll notice a column labeled **"Vendor Item"** in the line items. This column indicates whether the item is part of the vendor list (Yes) or not (No). To add a new item to the vendor list, select the line for the item you want to include and press **"Add to Vendor Items."** This action will add the item to the vendor item list.





Customer Item list

On the customer side, the **"Customer Item List"** option is available, functioning similarly to the vendor item list. Instead of a vendor item list, you use the customer item list to add items or G/L accounts for your customers.



For customers, this feature is used on sales orders instead of purchase orders. You can add relevant items for your customers using the **"Customer Items"** option. This will display the same table and options as the **"Vendor Items"** feature but for customers.

To add items or G/L accounts to the customer item list, you can also use the **"Add to Customer Items"** button to include them directly in your item list.