



# **CUSTOM FIELDS**

**V1.14.0.0**

**IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL**

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**USER SCENARIO DOCUMENTATION**

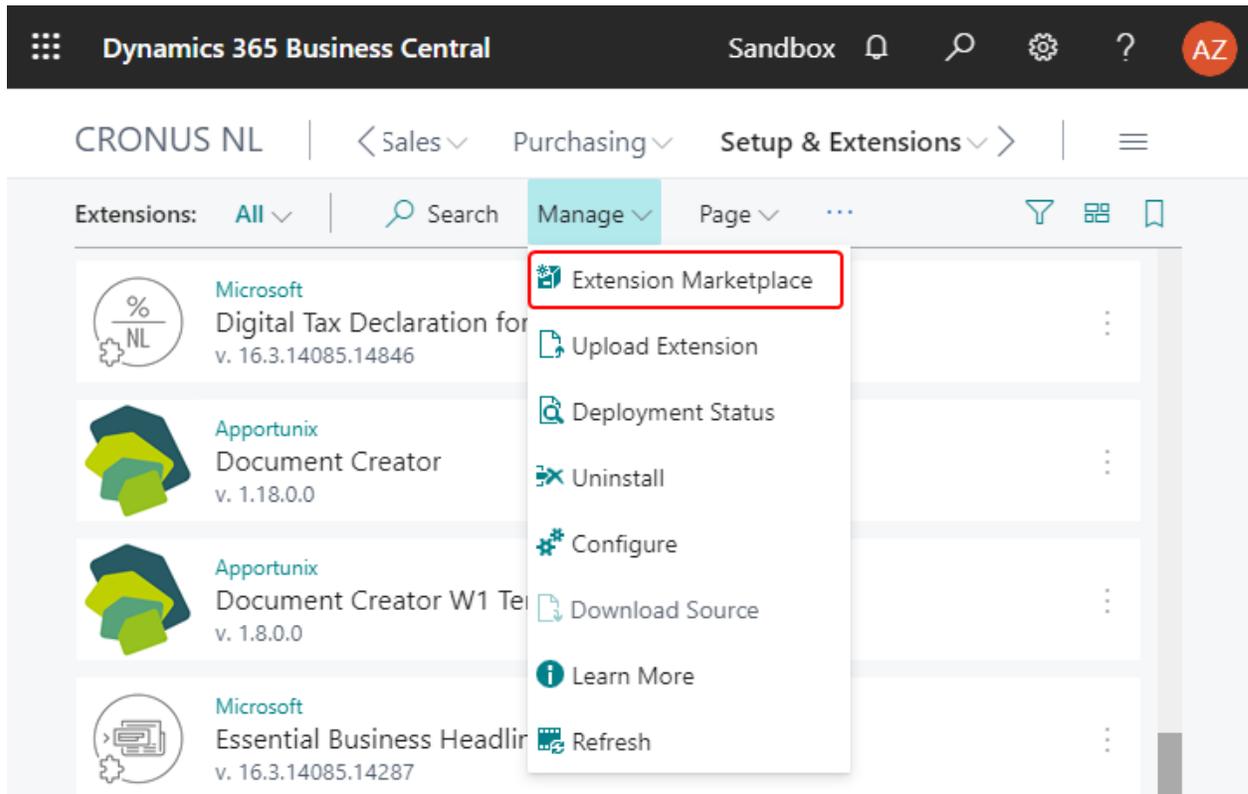
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## Installation

The Custom Fields extension can be installed from the Extension Marketplace (AppSource).

1. In Microsoft Dynamics 365 Business Central, go to **Setup & Extensions > Extensions**
2. Open the Extension Marketplace (AppSource) via: **Manage > Extension Marketplace**



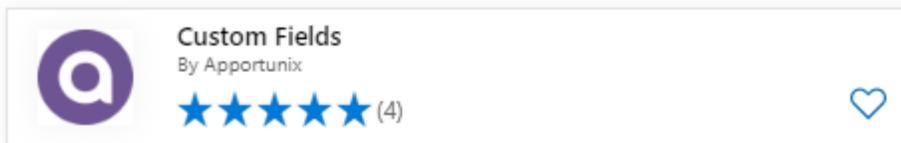
3. Search for and select "Custom Fields" (By Apportunix)



Trials  Pricing Model

Ratings

**App results (3)**



4. Please take note of the End-User License Agreement and Privacy Statement
5. Choose **GET IT NOW**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.

Apps > **Custom Fields**



## Custom Fields [save for later](#)

Apporunix

★★★★★ 5.0 (3)

[Overview](#) [Reviews](#)

**GET IT NOW**

**Pricing**  
Free

**Products**  
[Dynamics 365 Business Central](#)

**Publisher**  
Apporunix

**Acquire Using**  
Work or school account

**Version**  
1.14.0.0

**Categories**  
[Analytics](#)  
[Marketing](#)  
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**Support**  
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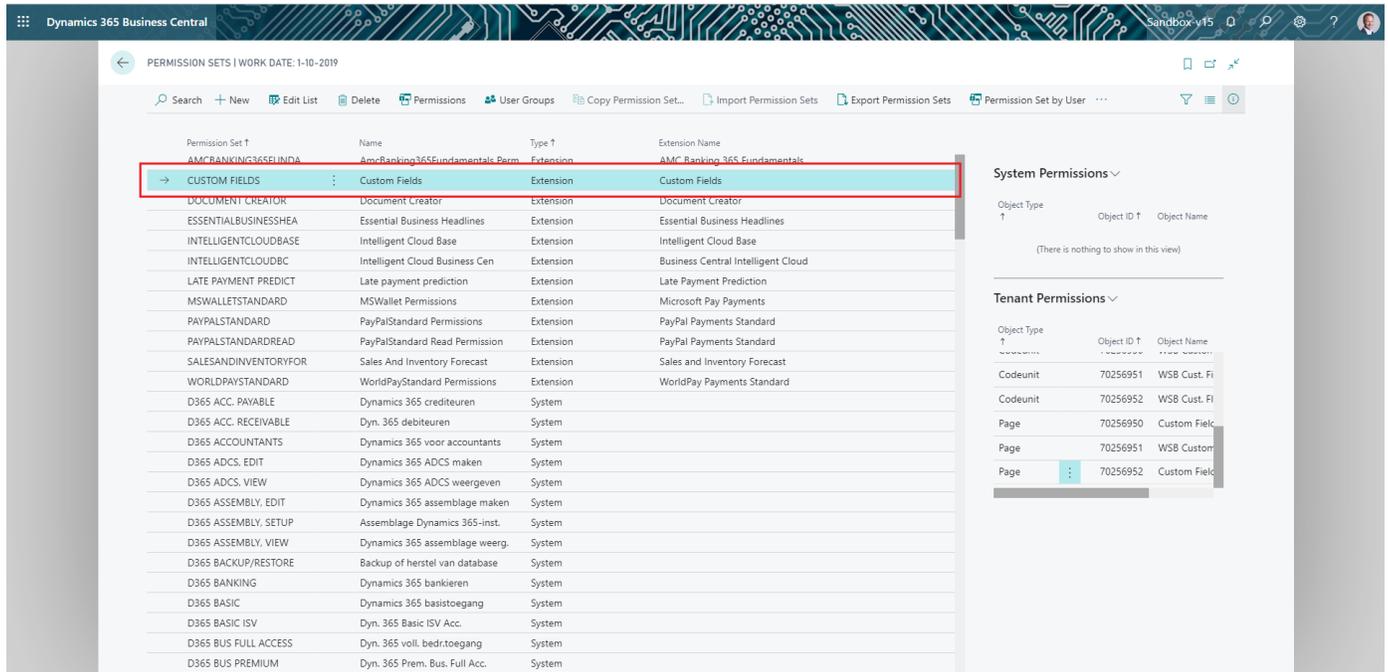
Easily create your own custom fields for customers, vendors, contacts and more

*Do you have customer data you can't register? Are you missing important contact or vendor information which is essential for your company business? And is there any sync between contacts, customers and vendors? Just some important issues Small to Midsize Businesses struggle with nowadays.*

At the moment a lot of standard fields for entities like contacts, customers and vendors are provided, but what if you want to register company specific data for your company process in Microsoft Dynamics 365 Business Central? We have the perfect app to help you get more productive. Using the **Custom Fields** extension you can easily create your own specific fields for customers, vendors, contacts and other entities. Each field can be set up with a field type for data entry, you can use customizable lists and can translate each custom field into your own language. The extension **Custom Fields** also supports synchronization of the custom fields between contacts, customers and vendors. This will enable you to maintain your data in one place and keep it in sync with the related data. A time-saving and error-limiting functionality!

## Permissions Configuration

After Custom Fields extension installed the permission set CUSTOM FIELDS was added to the system.



This permission set should be assigned to relevant users or user groups.

To assign the CUSTOM FIELDS permission set to users:

1. Choose the Lightbulb icon on the top right corner of the Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.
2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** FactBox.
3. Choose the **Edit** action to open the **User Card** page.
4. On the **User Permission Sets** FastTab, on a new line, fill in the Permission Set field with CUSTOM FIELDS.

USER CARD | WORK DATE: 1-10-2019

### Stefan Klop

Change Web Service Key | Effective Permissions | More options

#### Office 365 Authentication >

User Groups | Manage

Code ↑	Name	Company Name ↑
D365 BUS PREMIUM	D365 Premium Business Access	CRONUS NL
→ D365 TROUBLESHOOT	Problemen met D365 oplossen	CRONUS NL

#### User Permission Sets | Manage

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ CUSTOM FIELDS	Custom Fields	CRONUS NL	Custom Fields	Tenant
U365 BUS PREMIUM	Dyn. 365 Prem. Bus. Ful...	CRONUS NL		System
DOCUMENT CREAT...	Document Creator	CRONUS NL	Document Creator	Tenant
LOCAL	Land-/regiospecifieke f...	CRONUS NL		System
TROUBLESHOOT T...	Problemen met tools o...	CRONUS NL		System

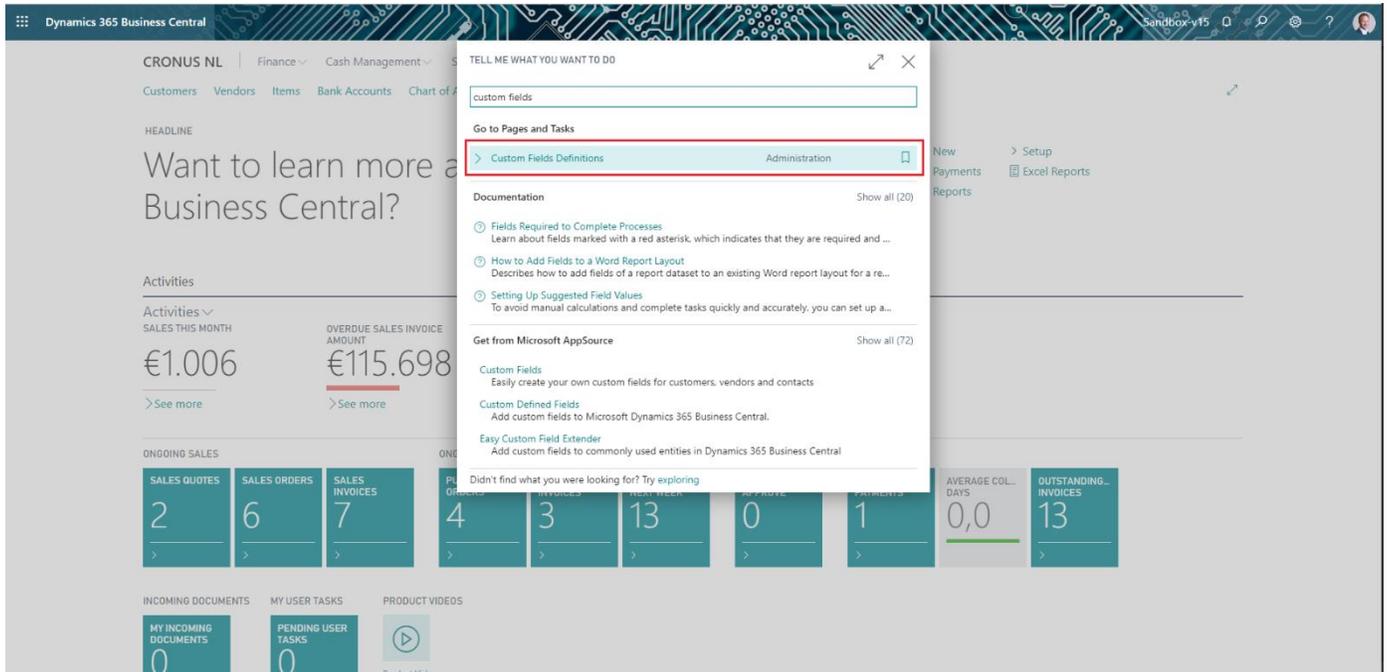
Notes +  
(There is nothing to show in this view)

Links +  
(There is nothing to show in this view)

For more information, please refer to Microsoft Dynamics 365 Business Central documentation - [Managing Users and Permissions](#)

## Setup and Usage

Search for Custom Fields Definition page to start custom fields configuration:

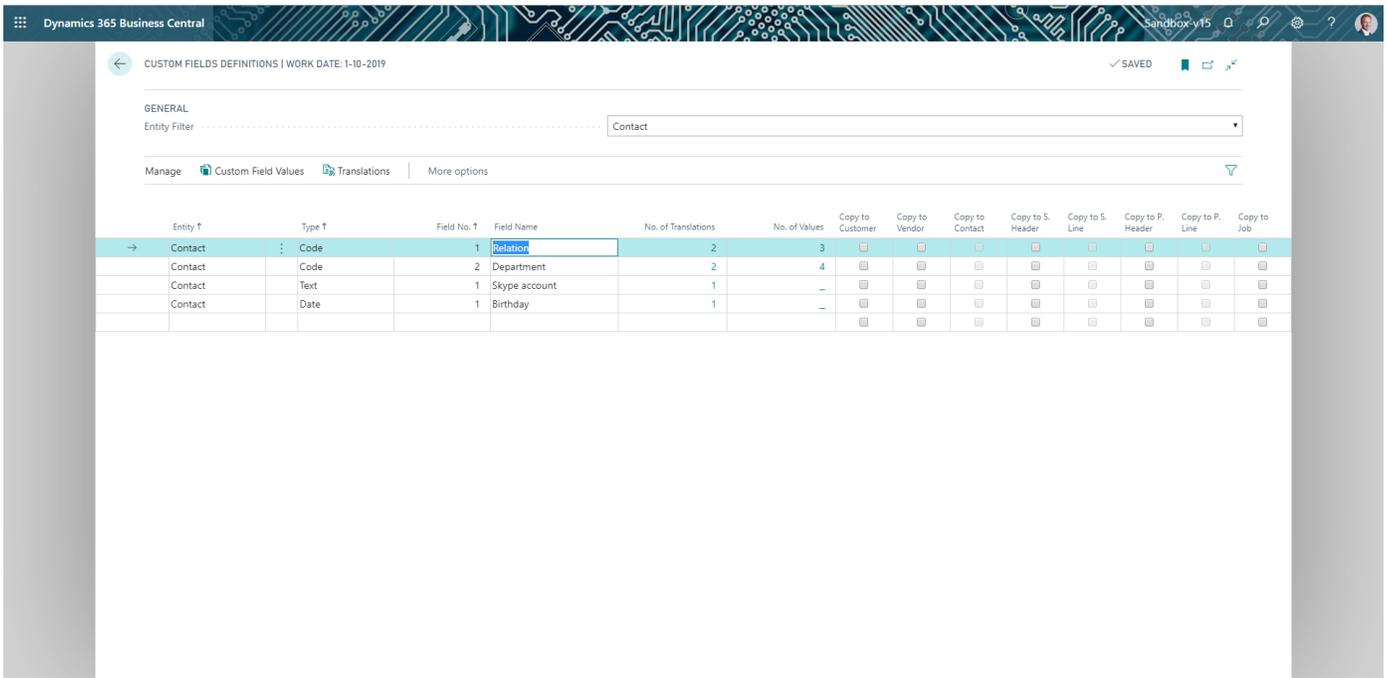


From the Custom Field Definitions page, it is possible to configure up to five custom fields for different data types for contacts, customers, vendors, items and jobs.

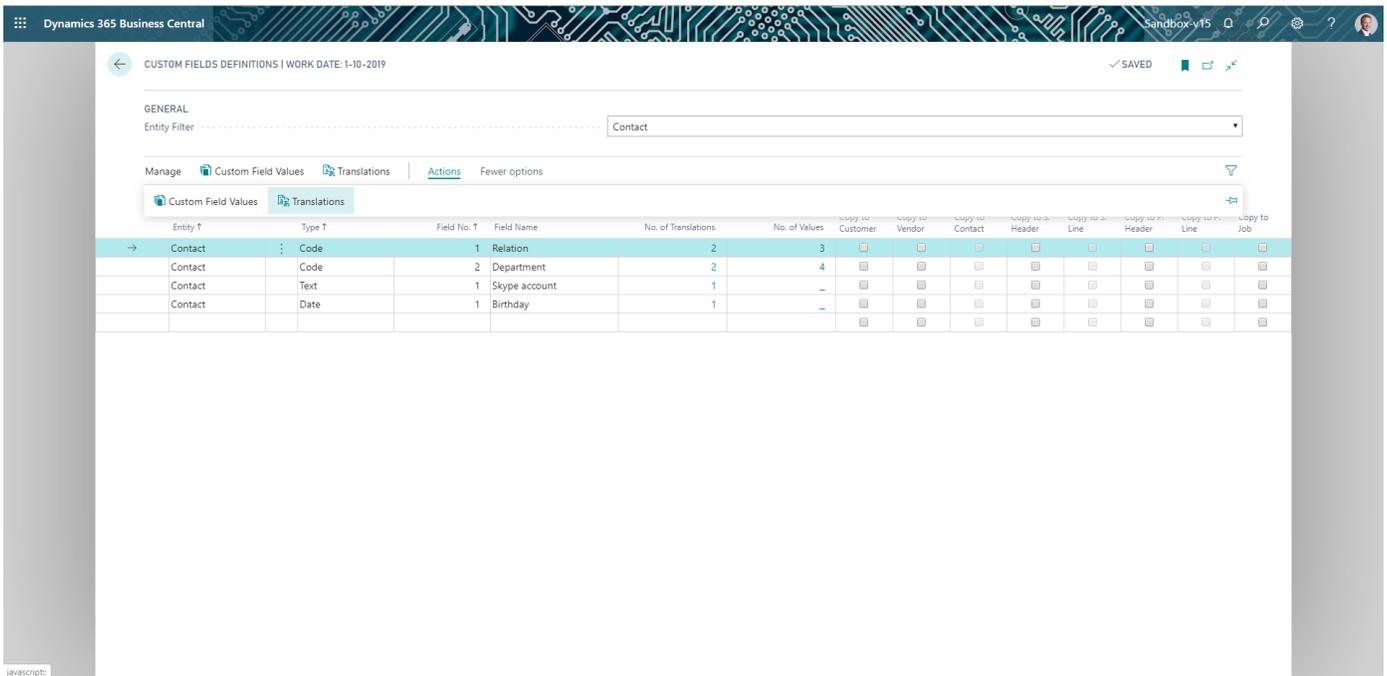
### Scenario 1: Custom fields on contacts

To set up custom fields for contacts:

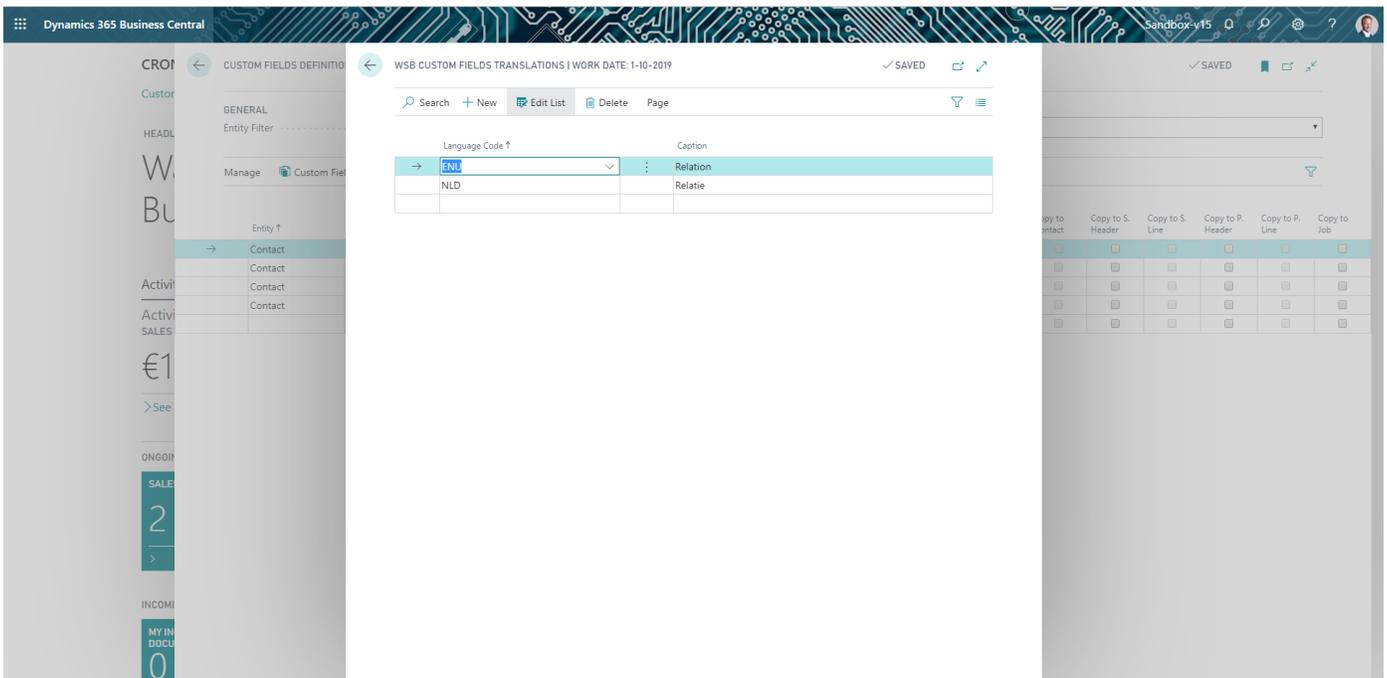
1. Choose the Contact as Entity Filter on the Custom Field Definitions page.
2. Add a new line, change the Type field to the appropriate one. The system will predefine Field No. but user can change it. The Field Name is mandatory to specify.
3. When the line inserted, the system will automatically add English (ENU) caption of the custom field. This default caption is the same as field name.



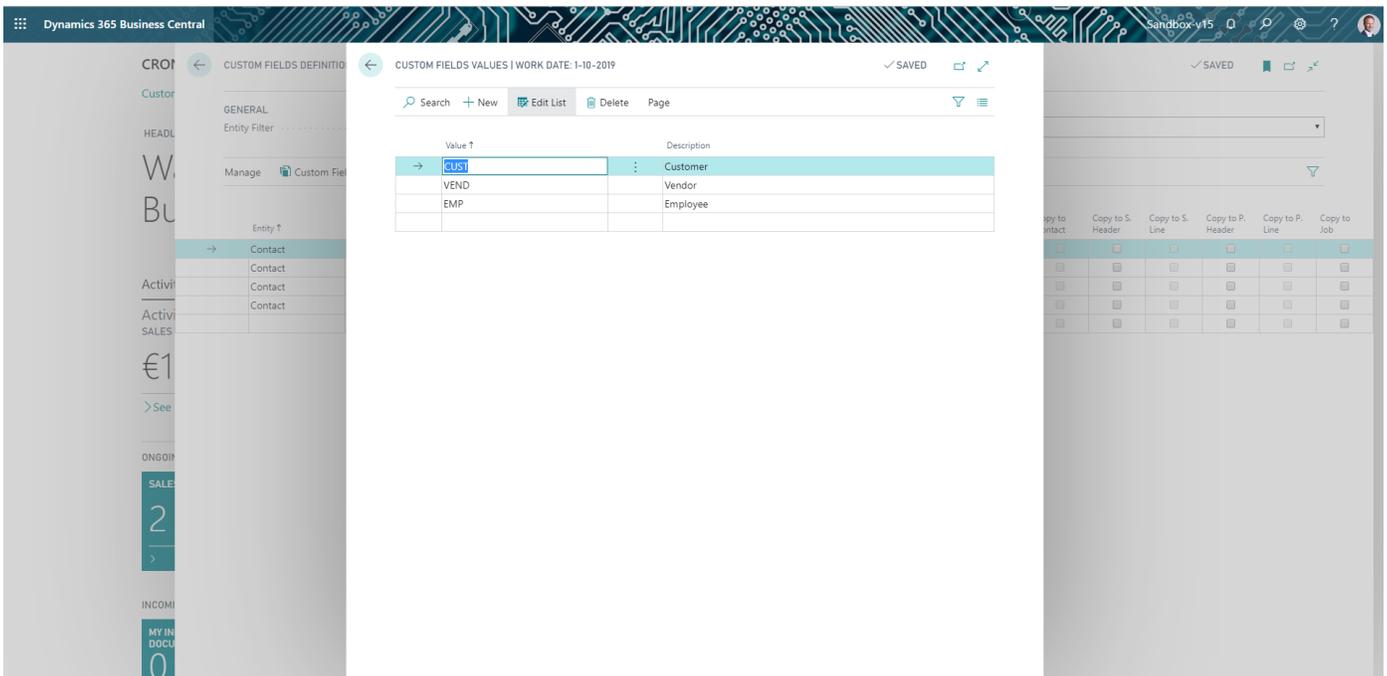
The user can add captions for other relevant languages in Custom Fields Translations page which is accessible from Actions:



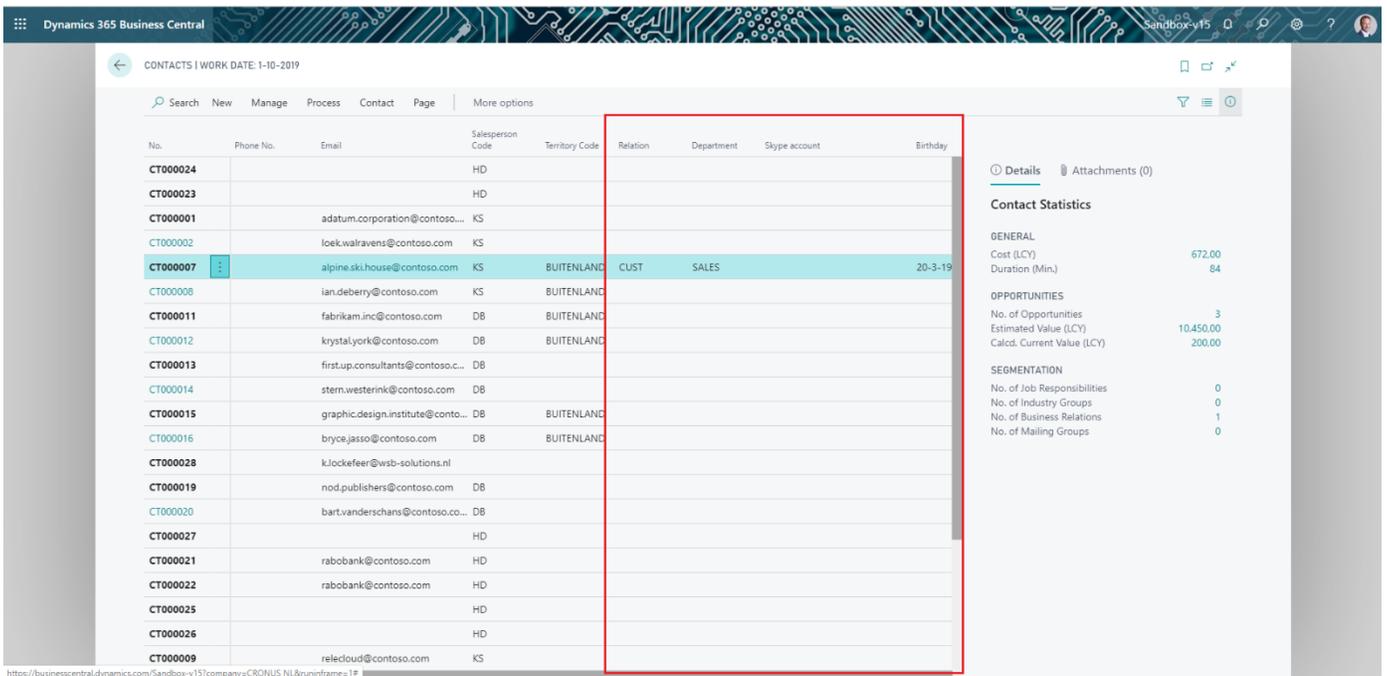
The example below shows captions in English and Dutch languages defined for the same custom field:



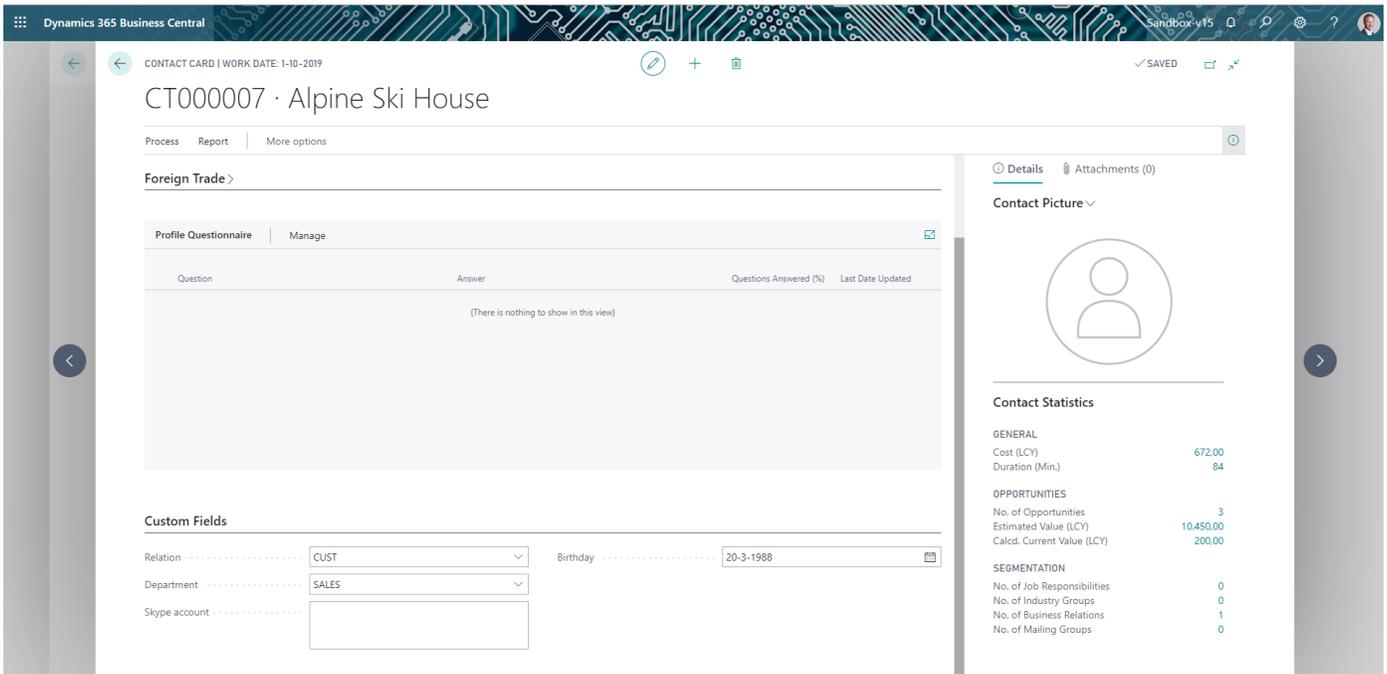
For custom fields of Code type, it is possible to set up values using Custom Field Values page accessible from Actions on the Custom Fields Definitions page:



After users logout and login again, the newly defined custom fields will be available on the list and card page (Custom Fields fasttab) of the contacts:

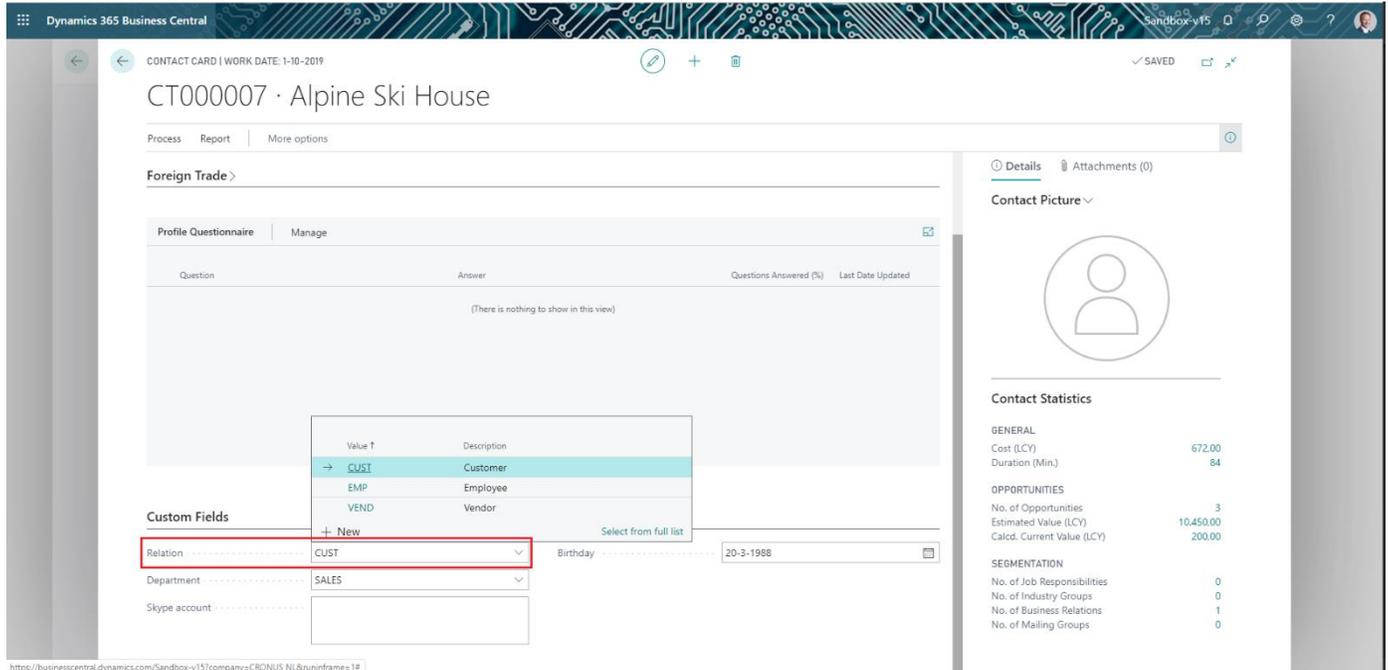


Custom fields on Contacts List page



Custom fields on the Contact Card page

The values defined for the custom field are available in the lookup but not mandatory to select.



## Scenario 2: Synchronization of custom fields between contacts and customers

Custom Fields extension enables possibility to synchronize values of the same type and the same field number between contacts and customers (also between contacts and vendors) when these records are linked to each other (using Contact Business Relation).

To set up synchronization for custom field of type Code between contacts and customers:

1. Set up custom fields for contact entity as described in Scenario 1.
2. Choose the Customer as Entity Filter on the Custom Field Definitions page.
3. Add custom fields and set Copy to Contact checkbox on the fields which should be kept in synchronization with contact:

**CUSTOM FIELDS DEFINITIONS | WORK DATE: 1-10-2019**

Entity Filter: Customer

Entity ↑	Type ↑	Field No. ↑	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
Customer	Code	1	Relation	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
Customer	Code	2	Customer Type	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Text	1	Website	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Boolean	1	Establishment within EU	1	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Copy to Contact**  
Specifies if a value of this custom field is copied to the linked contact records. Can be defined for customers or vendors.  
Press Ctrl+F1 to learn more

After the configuration is completed, the system will keep synchronized values if custom fields modified on a contact or customer:

**CONTACT CARD | WORK DATE: 1-10-2019**  
CT000007 · Alpine Ski House

Process Report More options

**Foreign Trade >**

Profile Questionnaire Manage

Question	Answer	Questions Answered (%)	Last Date Updated
(There is nothing to show in this view)			

**Custom Fields**

Relation: CUST Birthday: 20-3-1988

Department: SALES

Skype account:

**Contact Statistics**

**GENERAL**

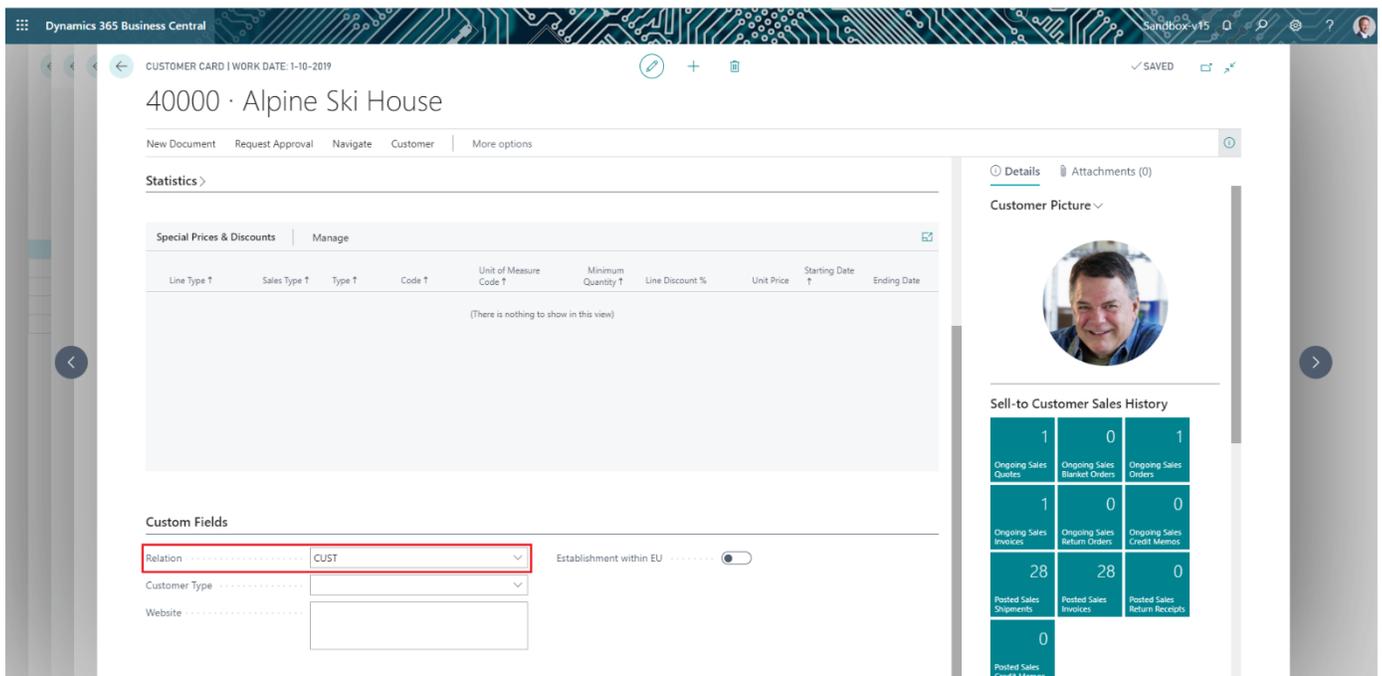
Cost (LCY)	672.00
Duration (Min.)	84

**OPPORTUNITIES**

No. of Opportunities	3
Estimated Value (LCY)	10450.00
Calcd. Current Value (LCY)	200.00

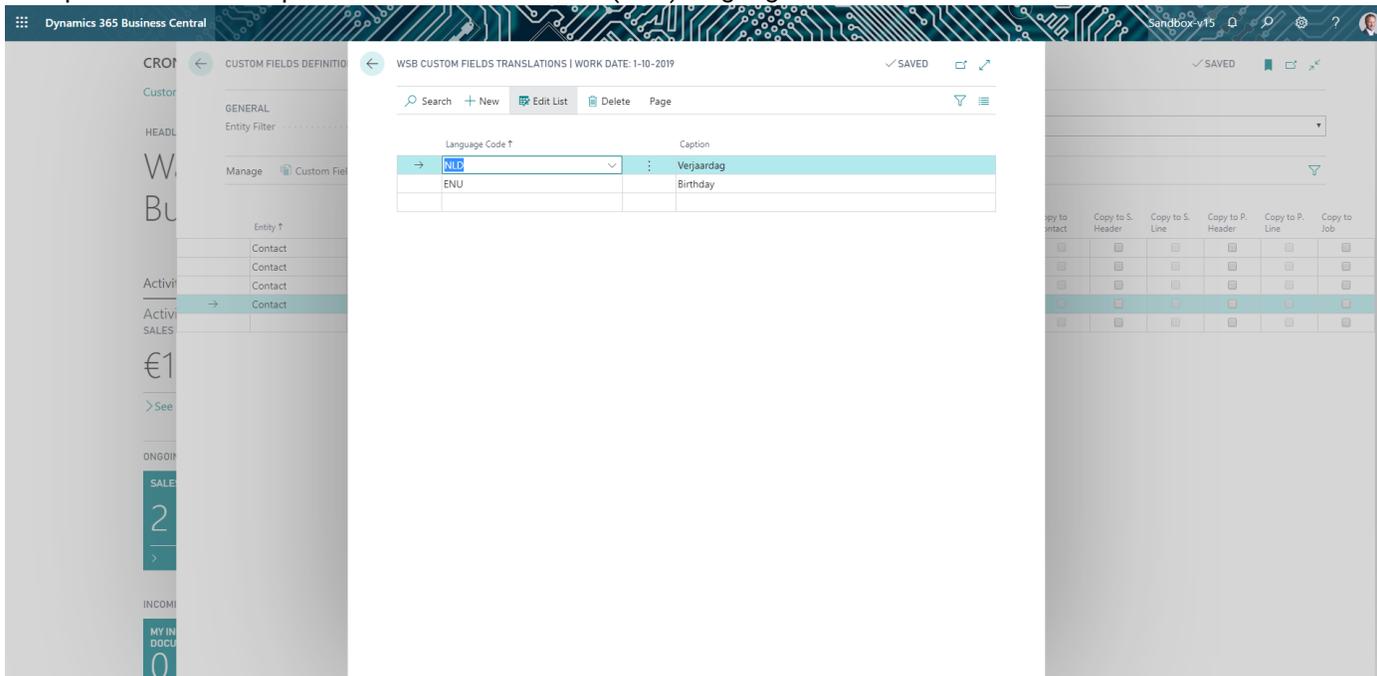
**SEGMENTATION**

No. of Job Responsibilities	0
No. of Industry Groups	0
No. of Business Relations	1
No. of Mailing Groups	0

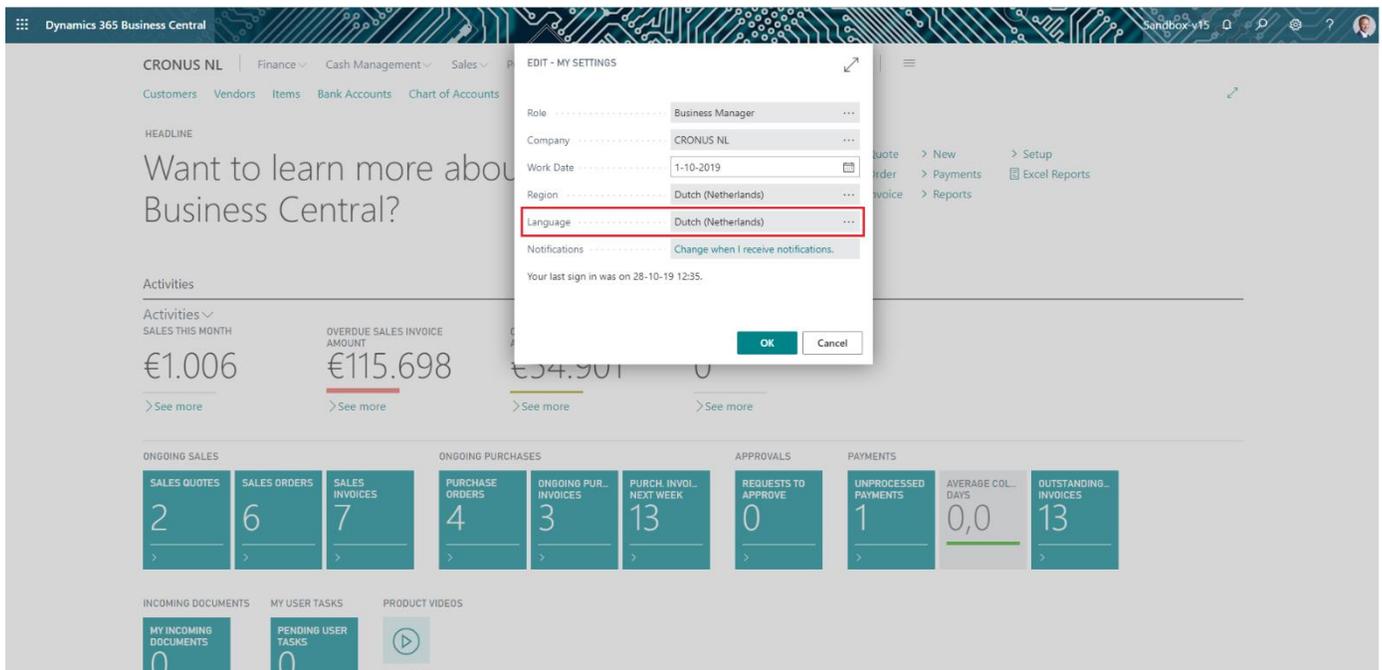


### Scenario 3: Custom fields in Dutch (Netherlands) system language

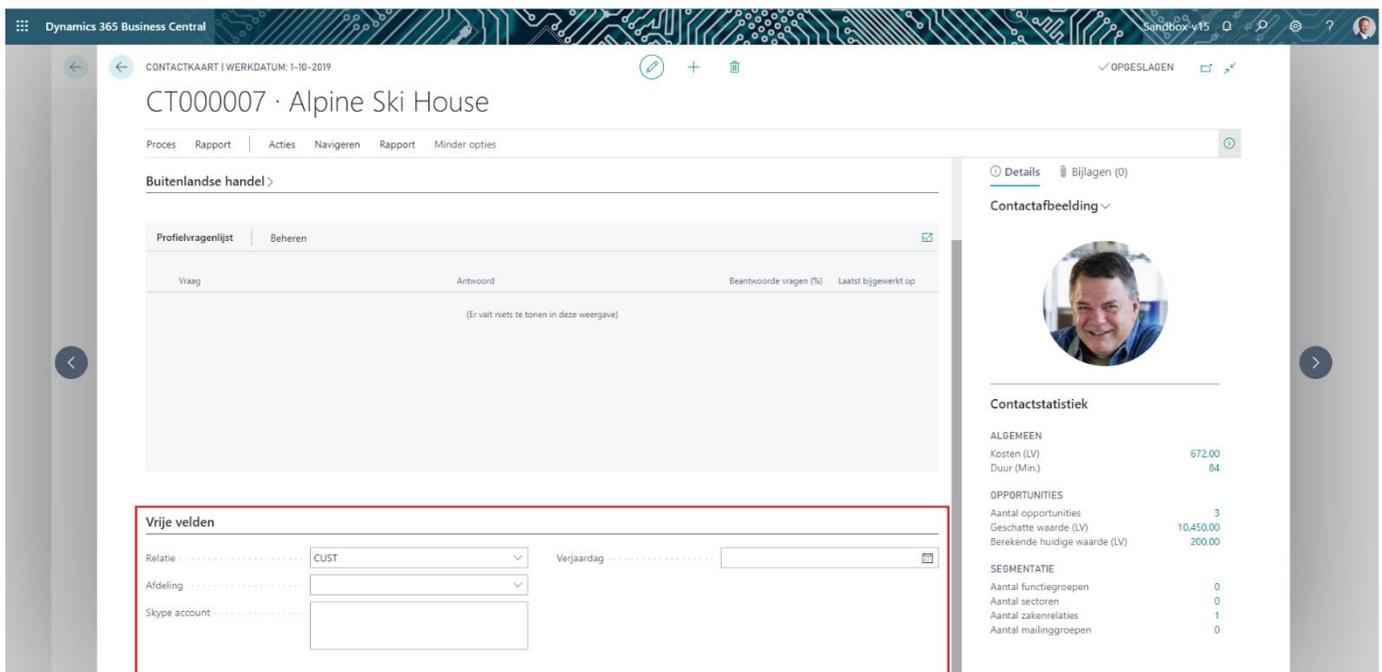
1. Set up custom fields caption translations for Dutch (NLD) language:



2. Open My Settings page and change Language to Dutch (Netherlands):



- After the language of the Microsoft Dynamics 365 Business Central changed, open the contact card and custom fields are shown according to captions defined for NLD language layer in Custom Fields Definitions:



## Scenario 4: Synchronization of custom fields between contacts, customers & vendors and their documents and jobs

Custom Fields extension enables possibility to transfer values of a contact, customer or vendor to the header of their documents, like sales quote and purchase order or jobs (only for customer).

To set up transferring of a custom field of type Code from a customer to the header of a sales quote.

1. Set up custom fields for Sales Header entity as described in Scenario 2.
2. Choose the Customer as Entity Filter on the Custom Field Definitions page.
3. Add custom fields and set Copy to S. Header checkbox (sales header) on the fields which should be transferred to the sales quote:

ENTITY	TYPE	FIELD NO.	FIELD NAME	NO. OF TRANSLATIONS	NO. OF VALUES	COPY TO CUSTO...	COPY TO VENDOR	COPY TO CONTA...	COPY TO S. HEADER	COPY TO S. LINE	COPY TO P. HEADER	COPY TO P. LINE	COPY TO JOB
Customer	Code	1	Relation	2	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Code	2	Customer Type	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Text	1	Website URL	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Boolean	1	Establishment within EU	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Header	Code	1	Relation with customer	2	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

After the configuration is completed, the system will keep transfer the values if the customer is used as a sell-to customer in the sales quote.

SALES QUOTE | WORK DATE: 5/1/2019

SQ190002 · Stefan Klop

Process Quote Request Approval Print/Send Release Navigate More options

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	DISCOI
Item	*	*			0			

Subtotal Excl. VAT (EUR) 0.00 Total Excl. VAT (EUR) 0.00  
 Inv. Discount Amount Excl. VAT ... 0.00 Total VAT (EUR) 0.00  
 Invoice Discount % 0 Total Incl. VAT (EUR) 0.00

Invoice Details > 5/1/2019 REMBOURS

Shipping and Billing > Stefan Klop

Foreign Trade >

Custom Fields

Relation with customer EMP

Documents Attached 0

Sell-to Customer Sales History

5 Ongoing Sales Quotes	0 Ongoing Sales Blanket Orders	0 Ongoing Sales Orders
0 Ongoing Sales Invoices	0 Ongoing Sales Return Orders	0 Ongoing Sales Credit Memos
0 Posted Sales Shipments	0 Posted Sales Invoices	0 Posted Sales Return Receipts
0 Posted Sales Credit Memos		

Sales Line Details

Item No. -  
 Required Quantity 0

ATTACHMENTS

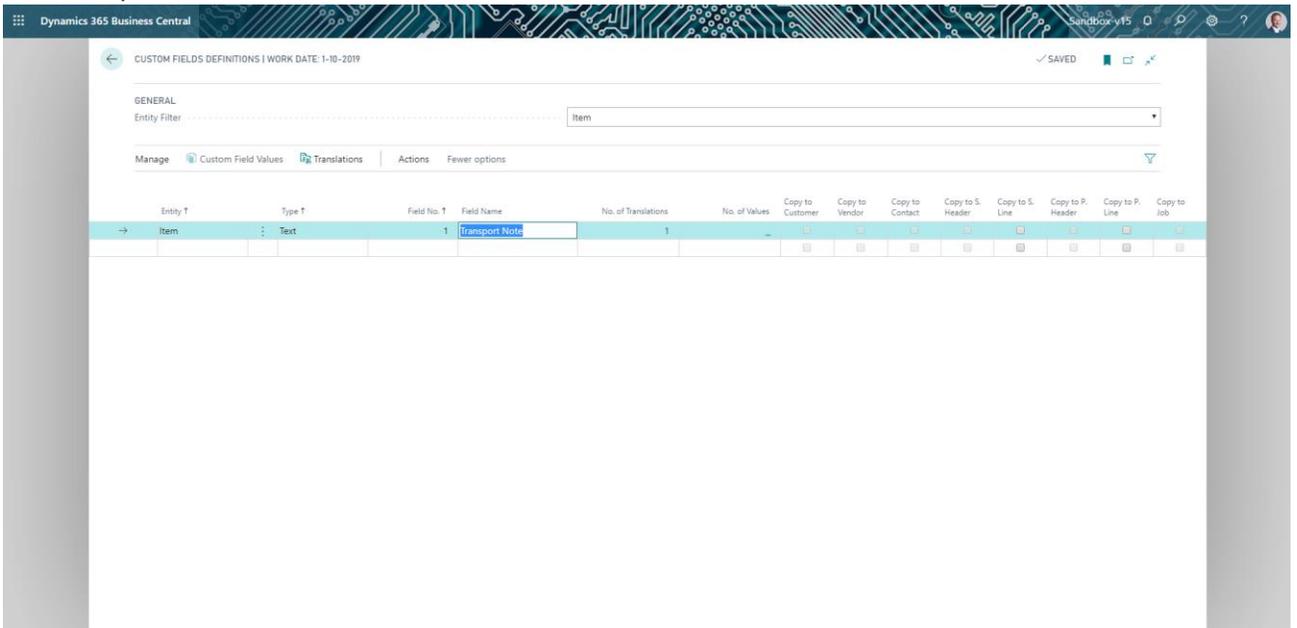
This same case is applicable for transferring values from vendors to purchase documents and customers to jobs.

## Scenario 5: Synchronization of custom fields between items and sales & purchase lines

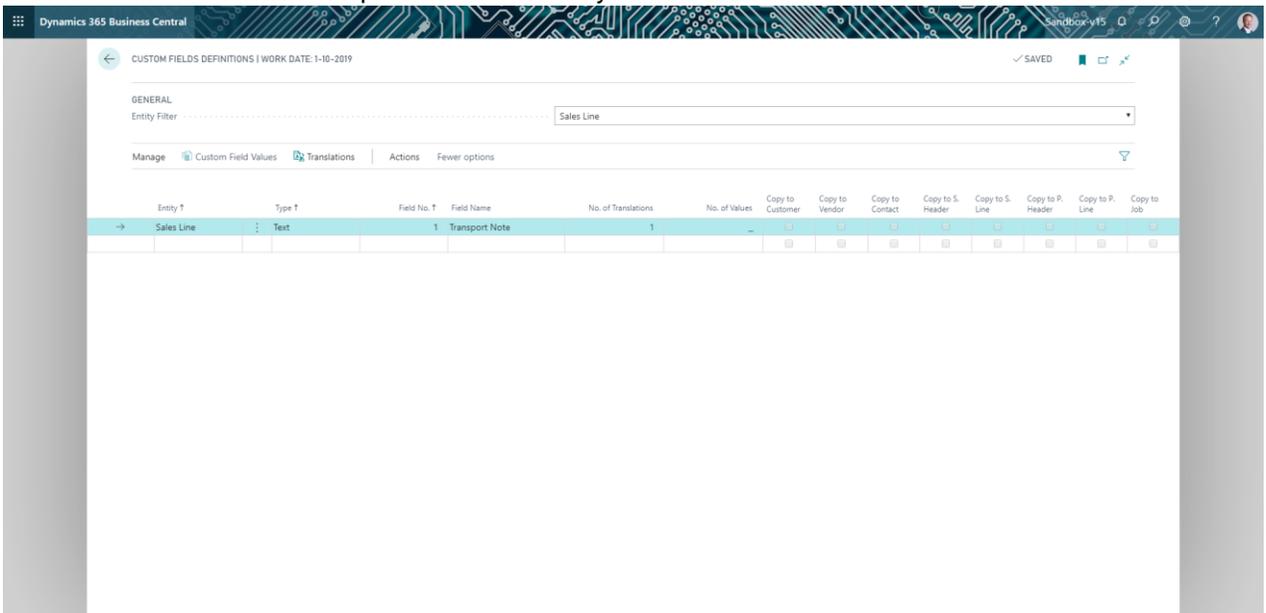
Custom Fields extension enables possibility to transfer values of an item to a sales or purchase line

To set up transferring for a custom field of type Text from an item to a sales order line.

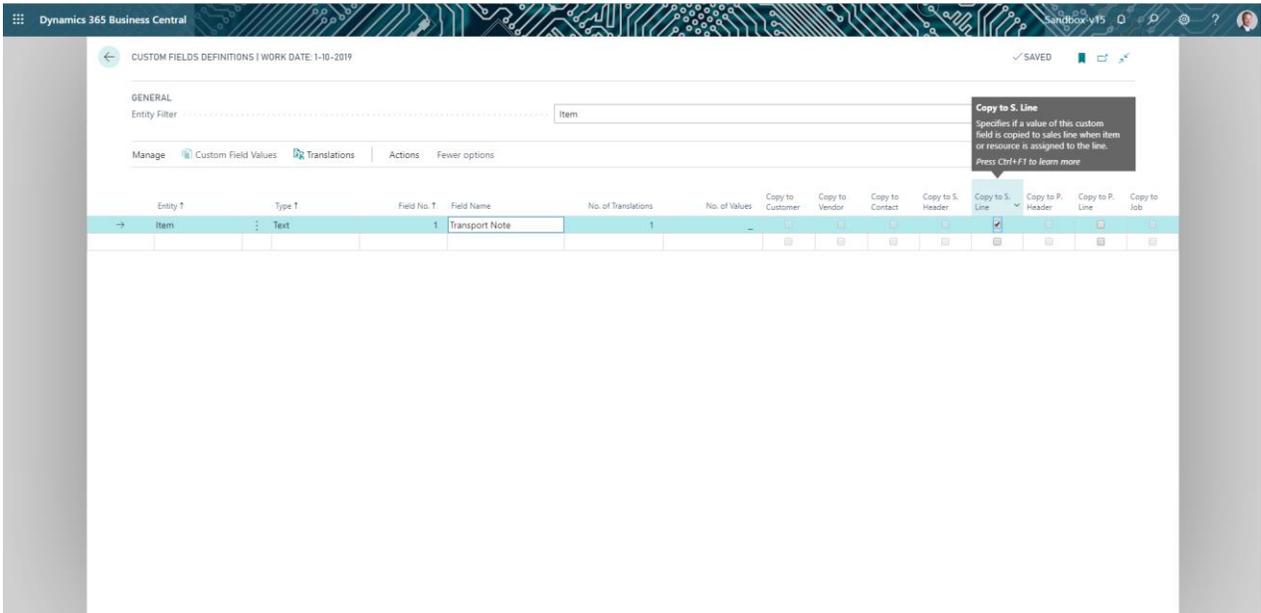
1. Choose the Item as Entity Filter on the Custom Field Definitions page.
2. Add a new line, change the Type field to Text. The system will predefine Field No. but user can change it. Specify the Field Name as Transport Note
3. When the line inserted, the system will automatically add English (ENU) caption of the custom field. This default caption is the same as field name.



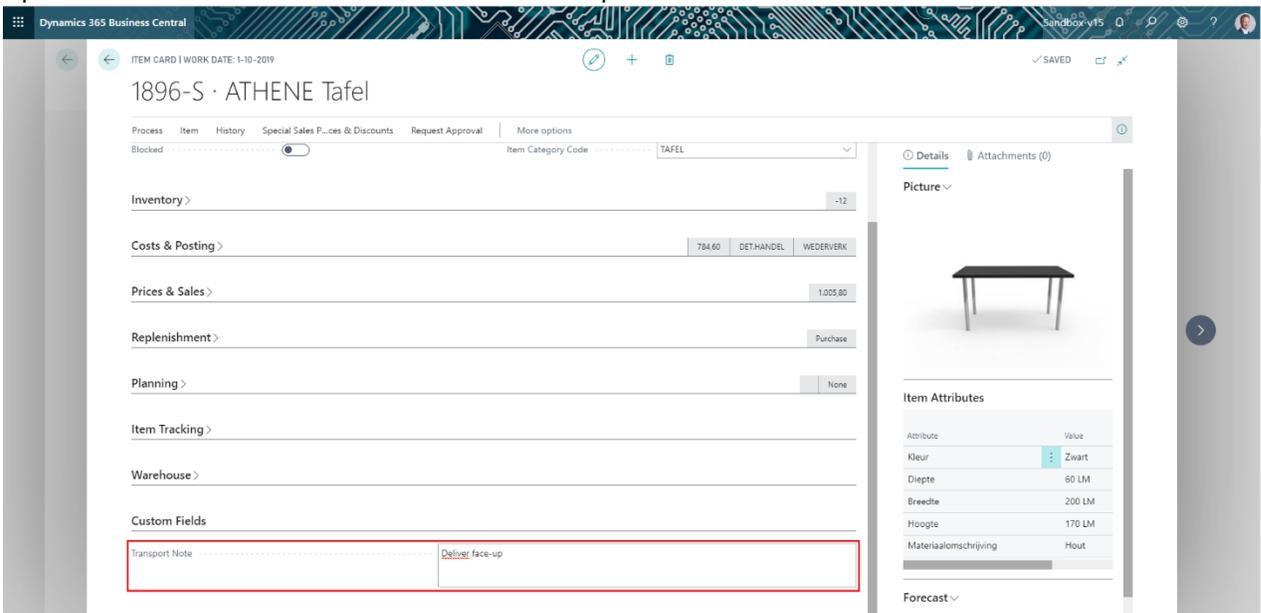
4. Create the same field from step 1 till 3 for the Entity filter Sales line



- Choose the Item as Entity Filter on the Custom Field Definitions page.
- Copy to S. Line checkbox (sales line) on the field created at step 1 which should be transferred to the sales order line



- Open an Item card and fill in the custom field *Transport Note* on the FastTab *Custom Fields*



- Create a Sales Order and enter the Item used on step 7 in the Sales lines

9. The custom field filled in step 7 is transferred to the sales line

The screenshot displays the Dynamics 365 Business Central interface for a sales order. The header shows the order number '101004' and the customer name 'Alpine Ski House'. The 'General' tab is active, showing a table of sales lines. A red box highlights the 'Transport Note' field in the second line, which contains the text 'Deliver face-up'. The right-hand pane shows the 'Sell-to Customer Sales History' and 'Customer Details' sections.

Type	Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Department Code	Customergro... Code	Transport Note
Item	-	14-5-2019	13-5-2019	13-5-2019			Transport Note
→ Item	-	14-5-2019	13-5-2019	13-5-2019			Deliver face-up

Summary values:

- Subtotal Excl. VAT (EUR): 1,578.80
- Total Excl. VAT (EUR): 1,578.80
- Inv. Discount Amount Excl. VAT: 0.00
- Total VAT (EUR): 0.00
- Invoice Discount %: 0
- Total Incl. VAT (EUR): 1,578.80

Customer Details:

- Customer No.: 40000
- Name: Alpine Ski House
- Phone No.:
- Email: ian.deberry@contoso.com
- Fax No.:
- Credit Limit (LCY): 0.00
- Available Credit (LCY): 0.00