CUSTOM FIELDS

V1.14.0.0

IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

USER SCENARIO DOCUMENTATION

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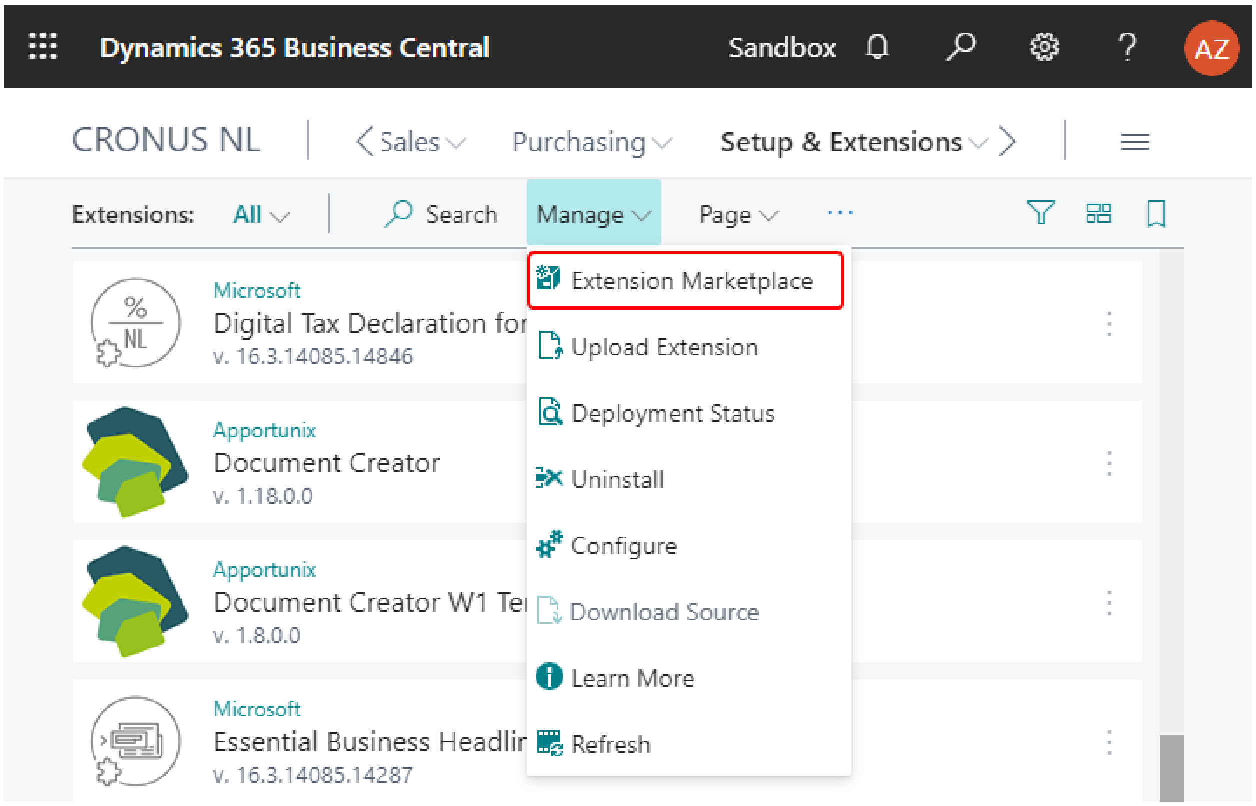
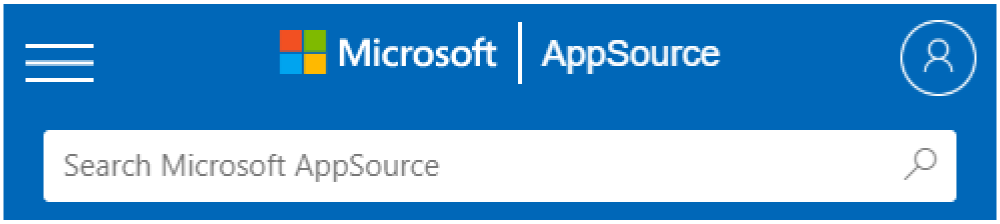
Installation

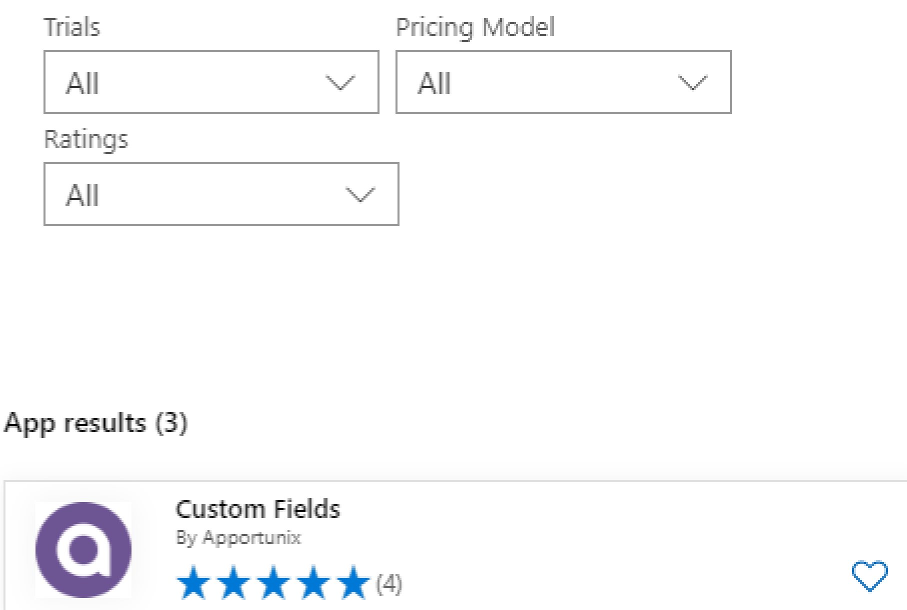
The Custom Fields extension can be installed from the Extension Marketplace (AppSource).

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

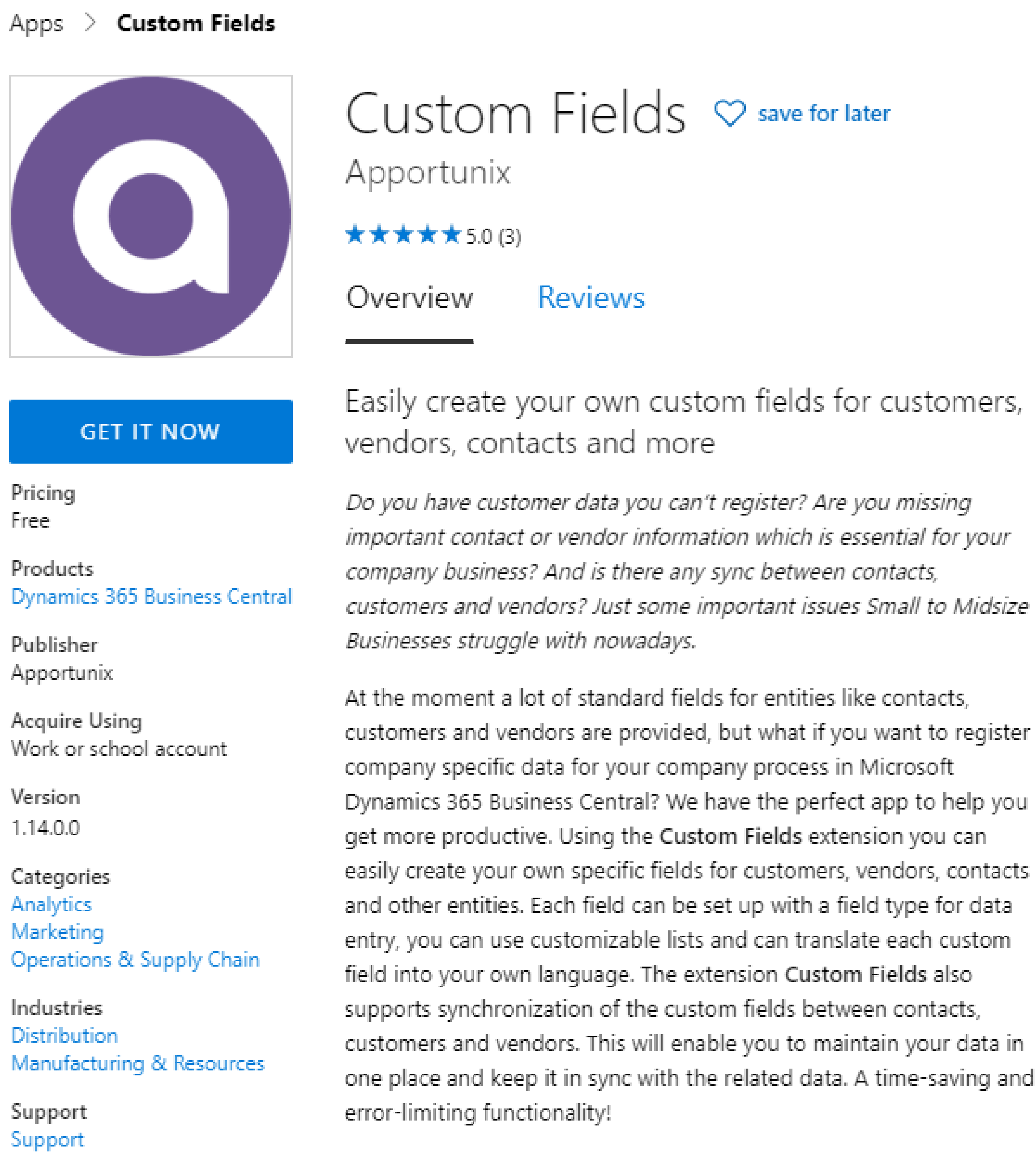


3. Search for and select “Custom Fields” (By Apportunix)



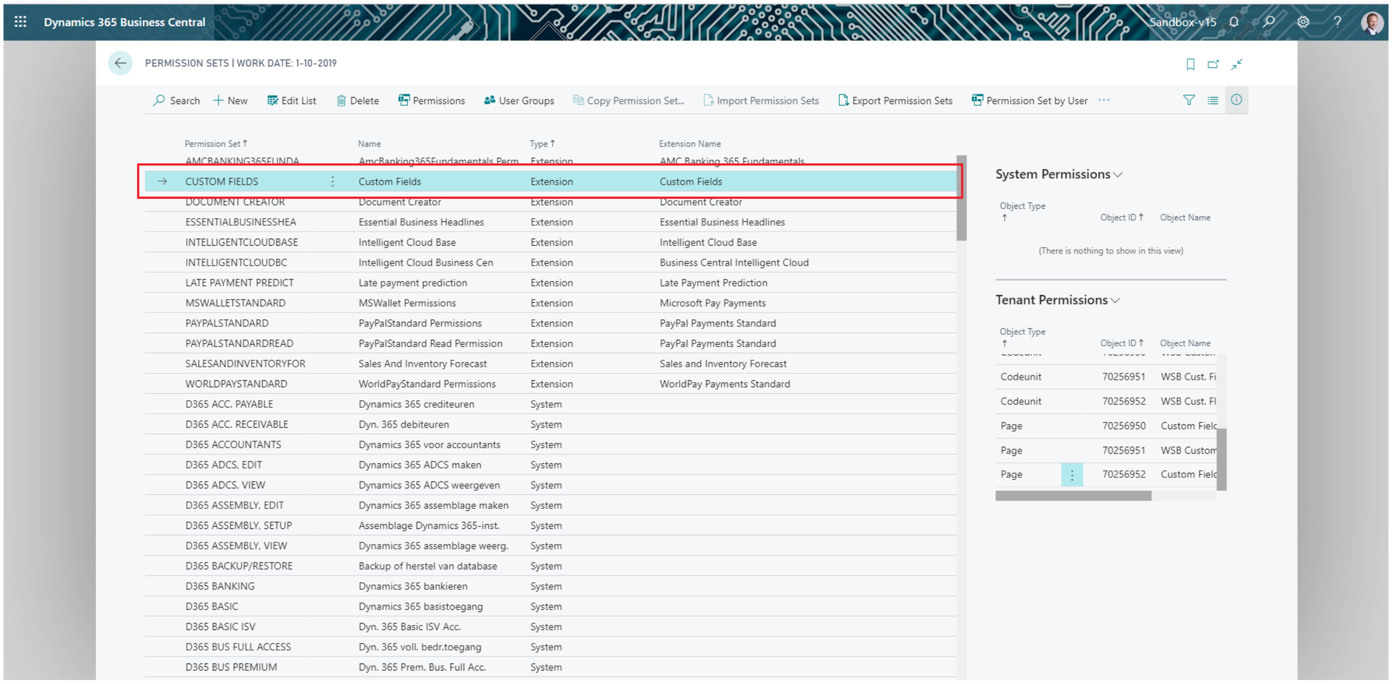


4. Please take note of the End-User License Agreement and Privacy Statement
5. Choose **GET IT NOW**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.



Permissions Configuration

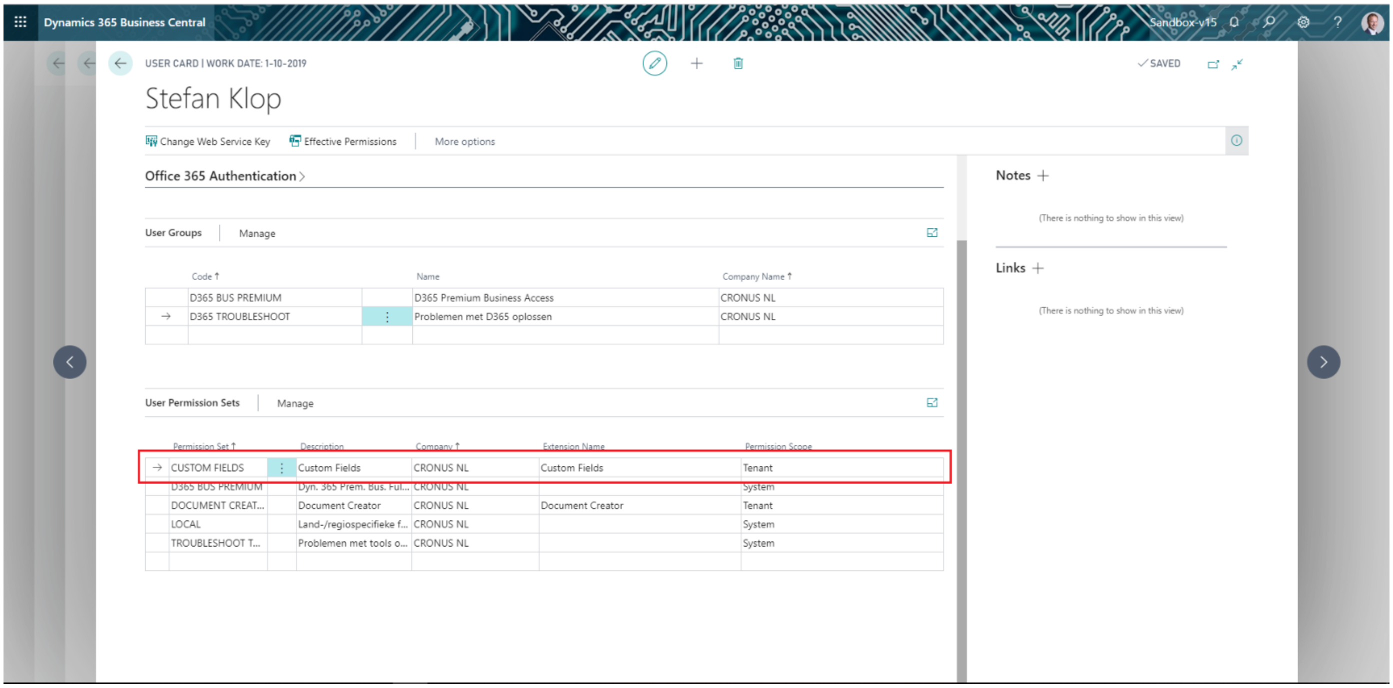
After Custom Fields extension installed the permission set CUSTOM FIELDS was added to the system.



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

To assign the CUSTOM FIELDS permission set to users:

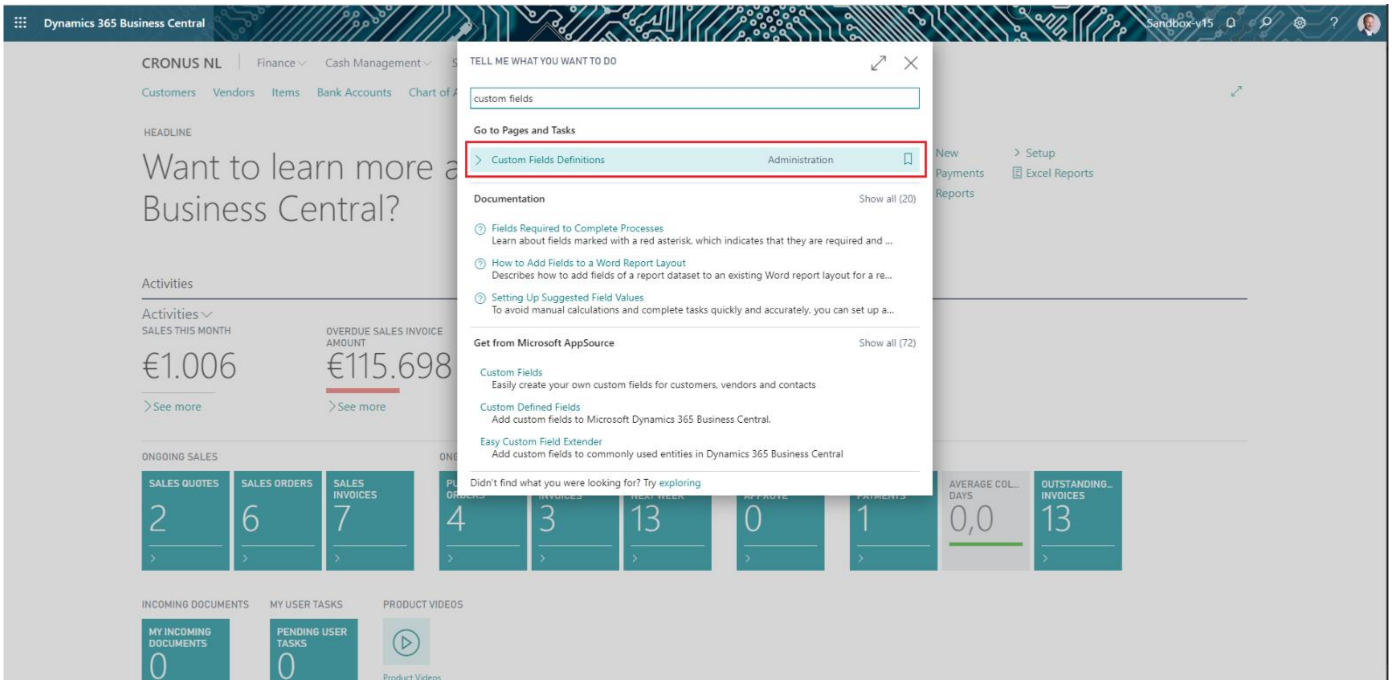
1. Choose the Lightbulb icon on the top right corner of the Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.
2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **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.



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:

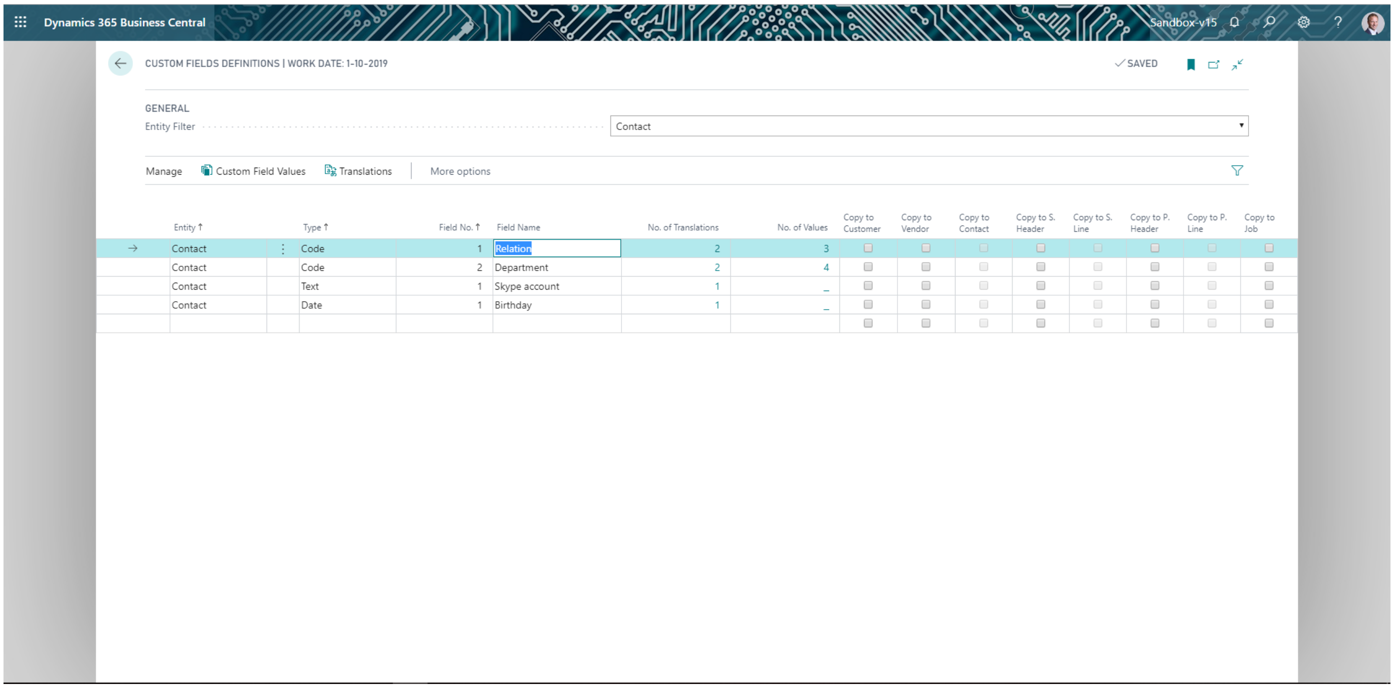


From the Custom Field Definitions page, it is possible to configure up to five custom fields for different data types for contacts, customers, vendors, items and jobs.

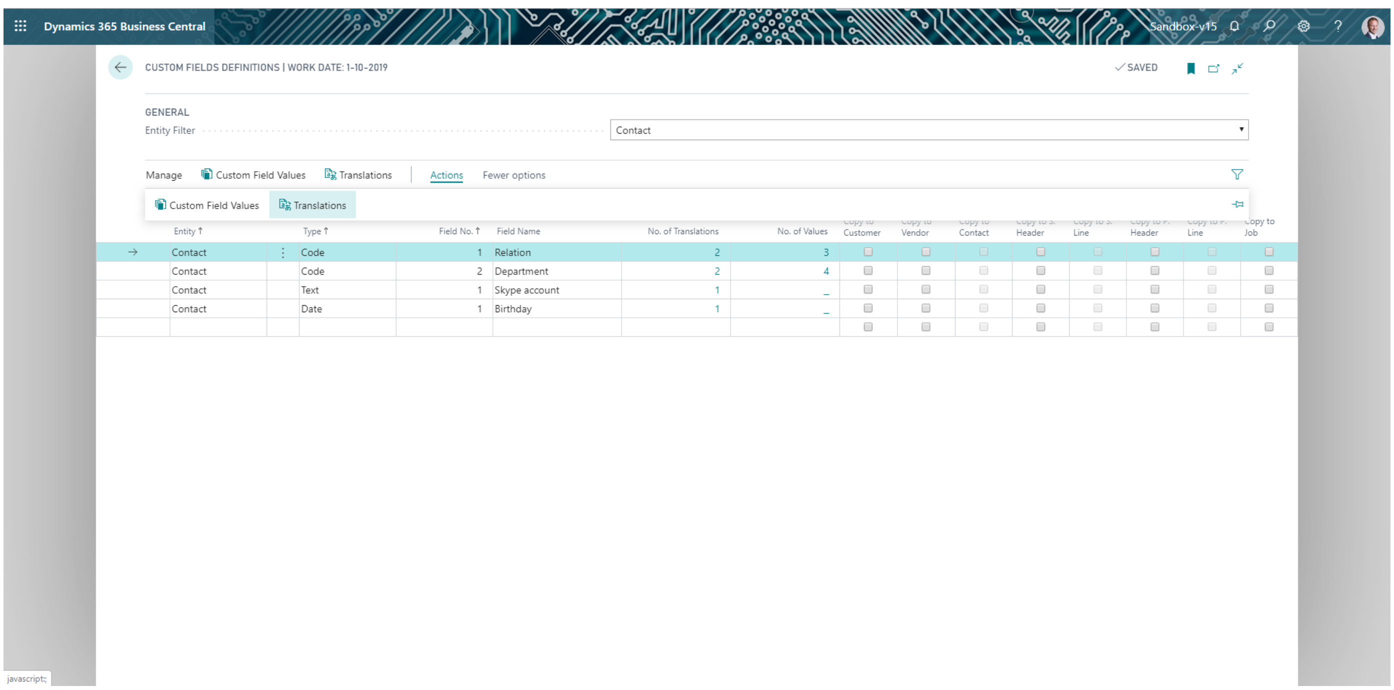
Scenario 1: Custom Fields on contacts

To set up custom fields for contacts:

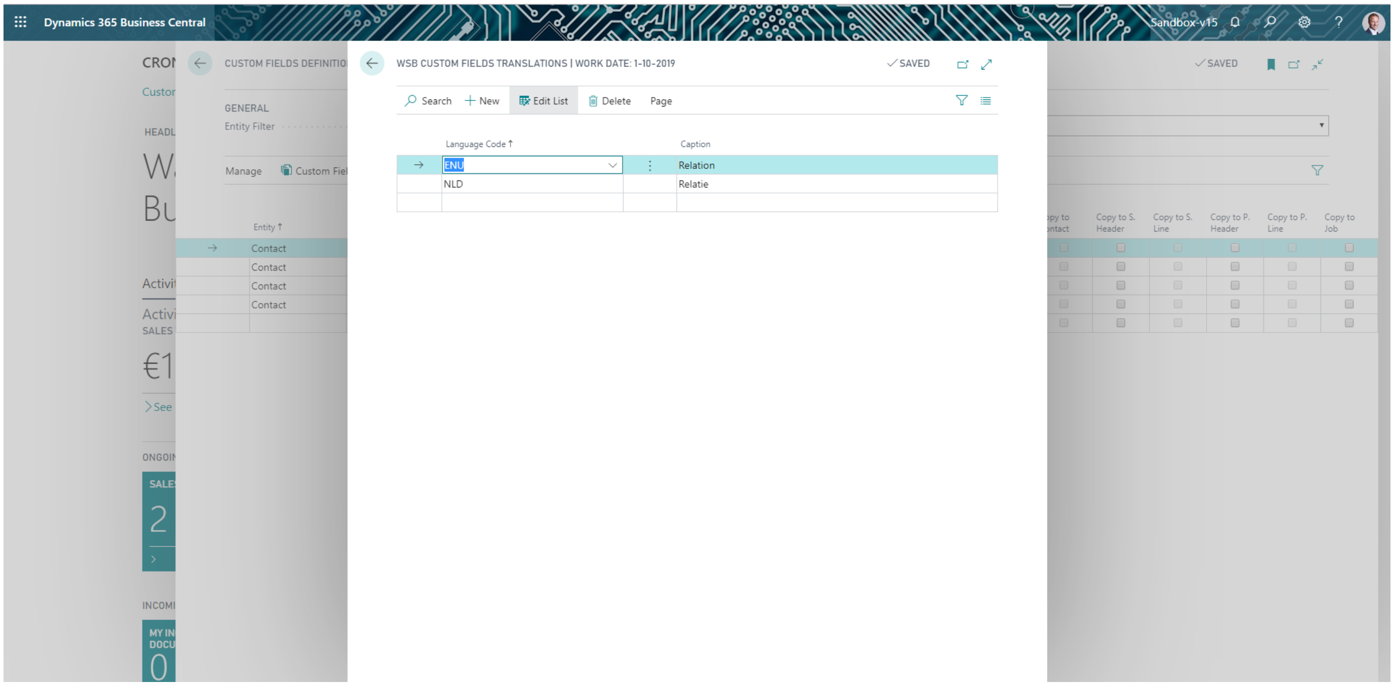
1. Choose the Contact as Entity Filter on the Custom Field Definitions page.
2. Add a new line, change the Type field to the appropriate one. The system will predefine Field No. but user can change it. The Field Name is mandatory to specify.
3. When the line inserted, the system will automatically add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



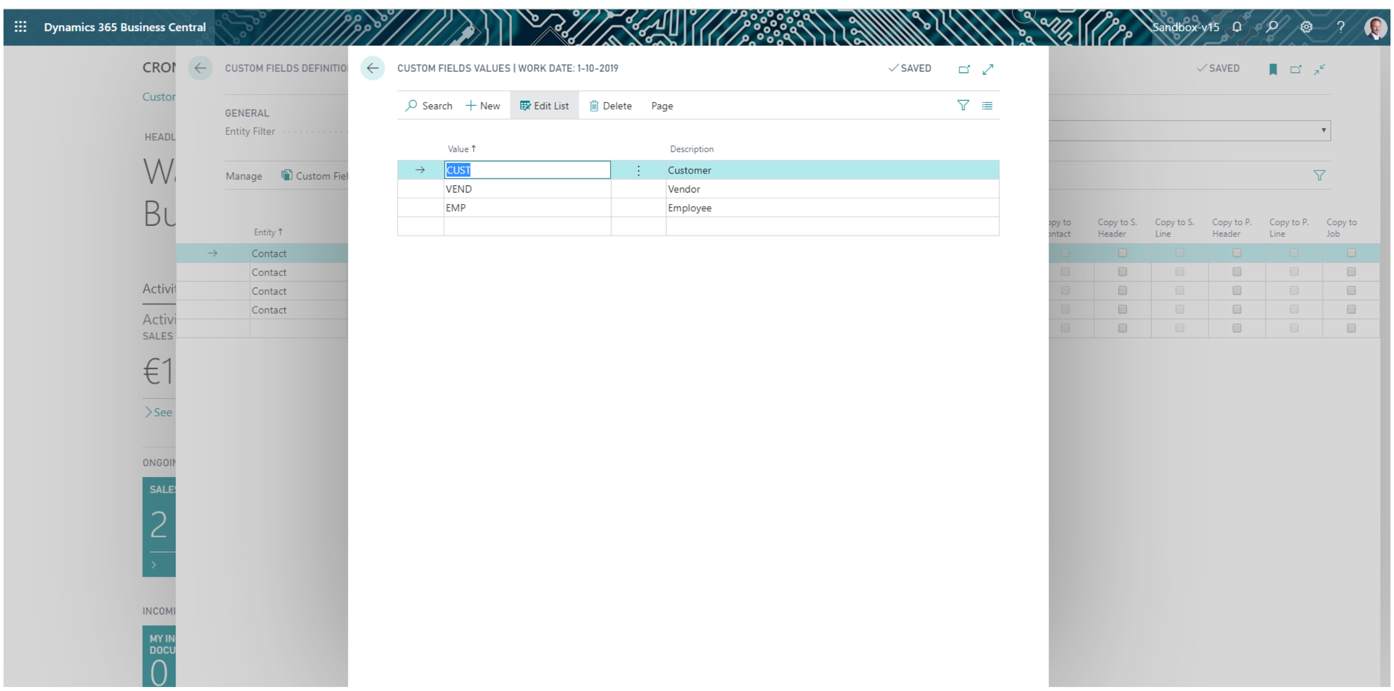
The user can add captions for other relevant languages in Custom Fields Translations page which is accessible from Actions:



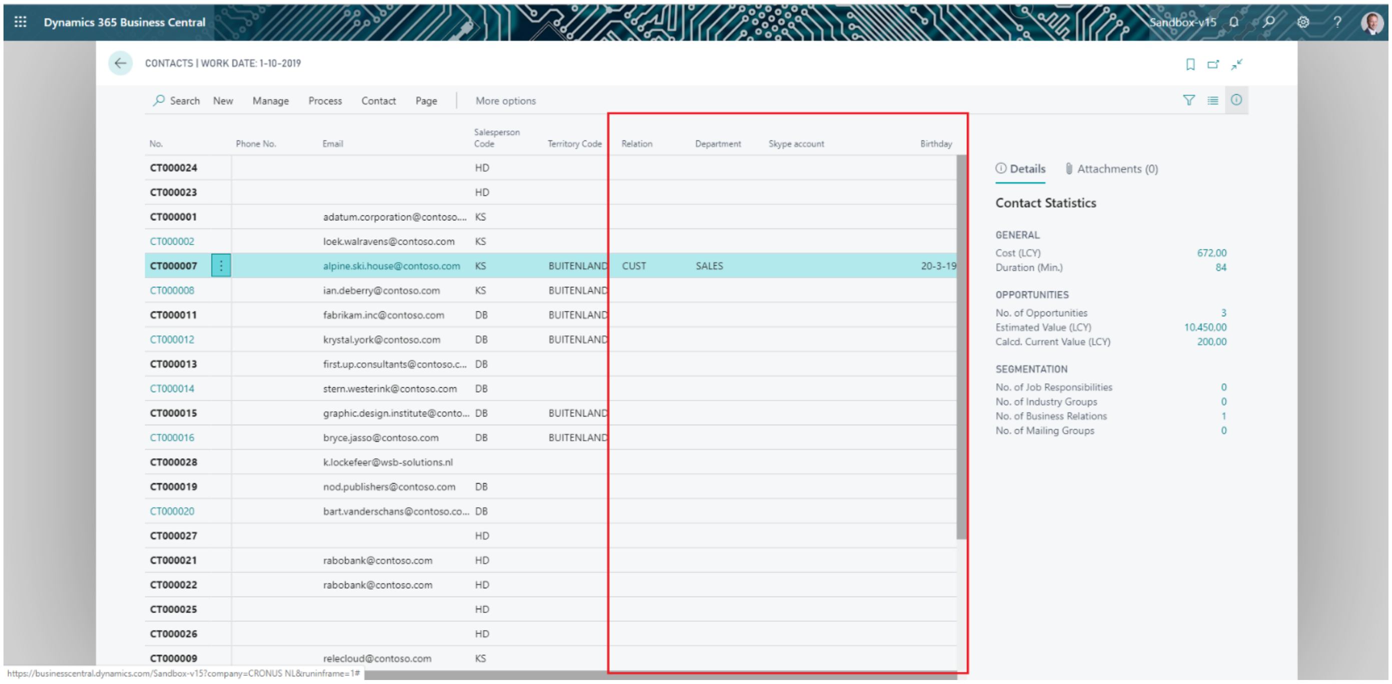
The example below shows captions in English and Dutch languages defined for the same custom field:



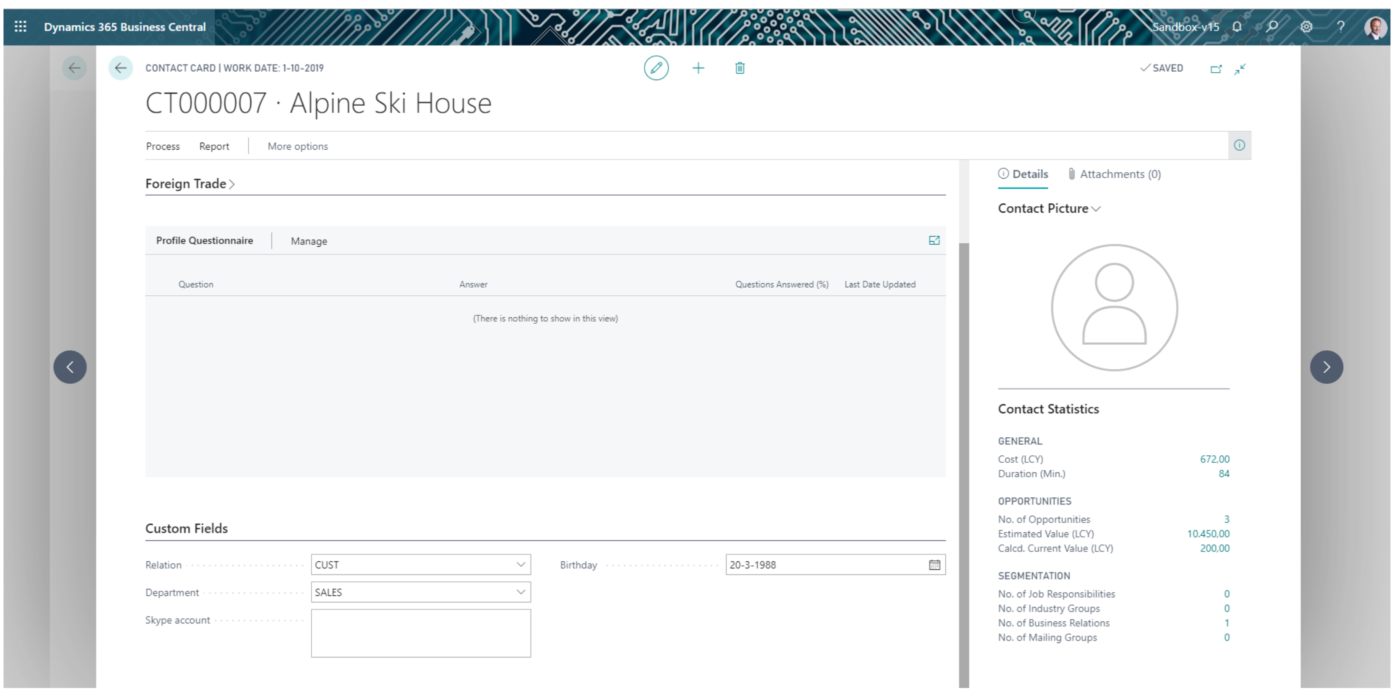
For custom fields of Code type, it is possible to set up values using Custom Field Values page accessible from Actions on the Custom Fields Definitions page:



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:

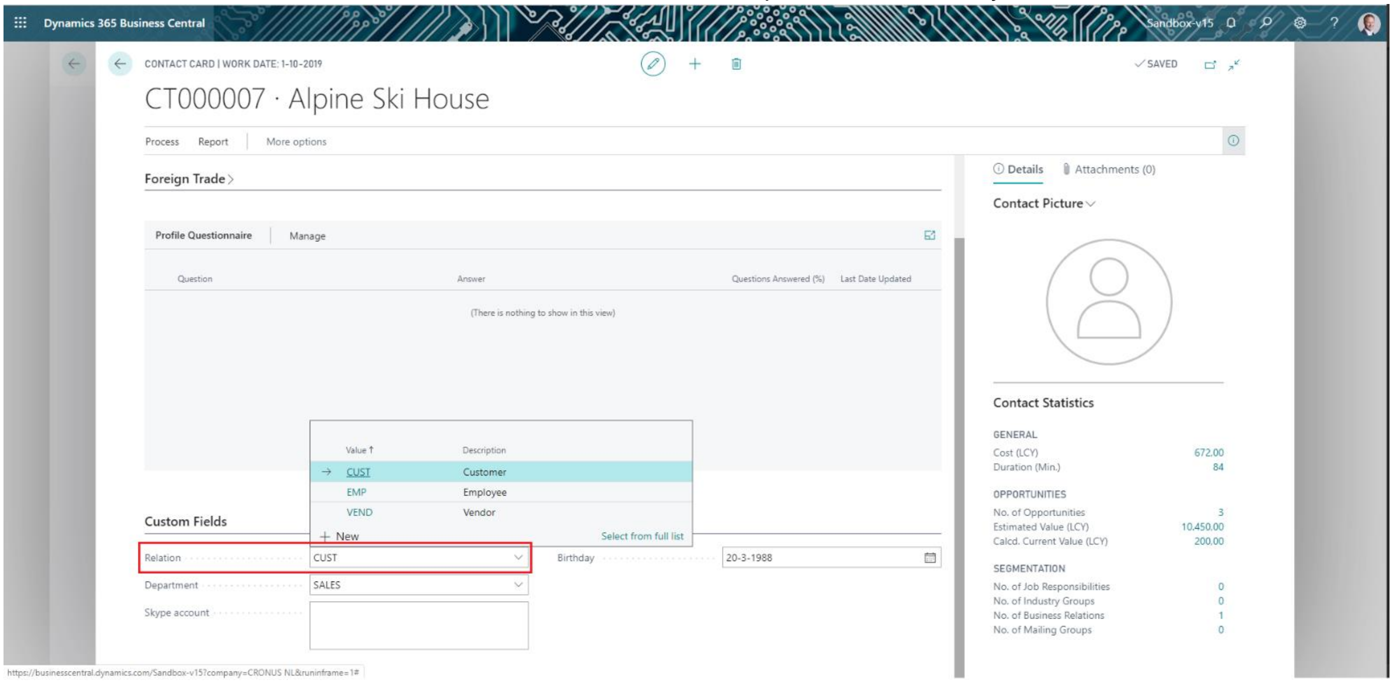


<u>Custom fields on Contacts List page</u>



<u>Custom fields on the Contact Card page</u>

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

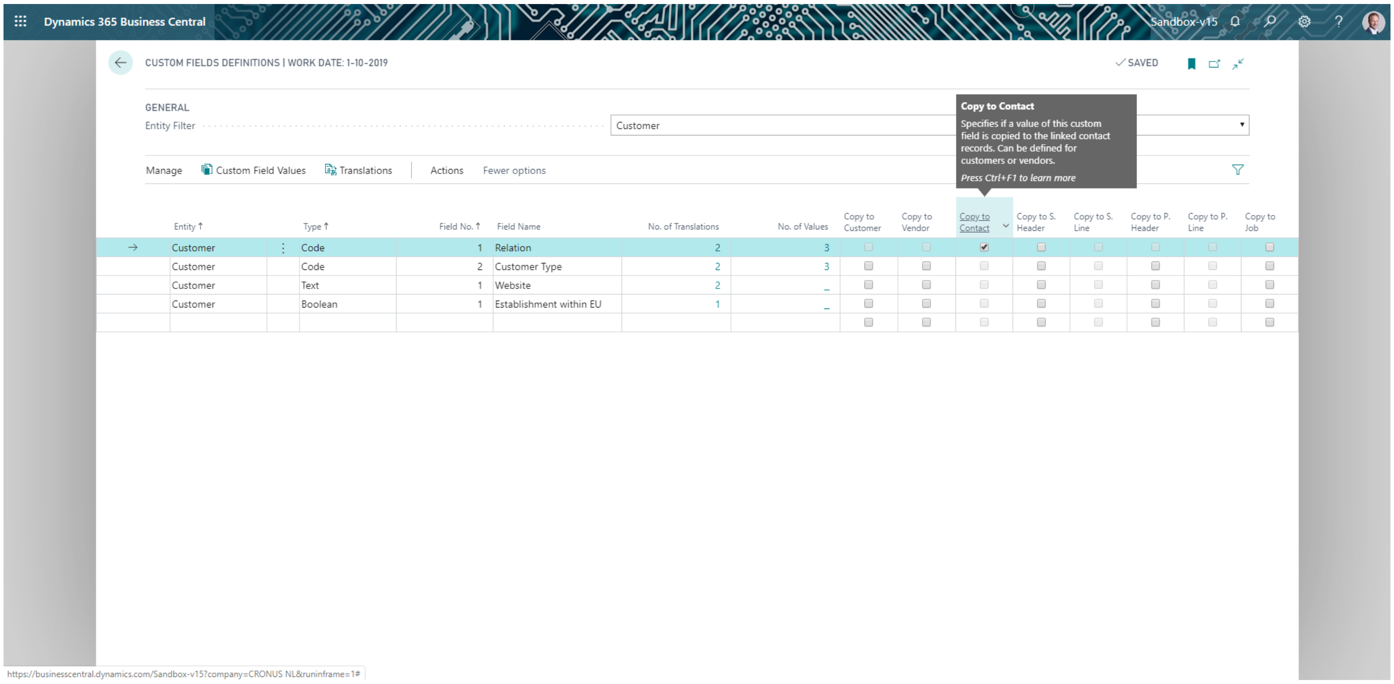


Scenario 2: Synchronization of custom fields between contacts and customers

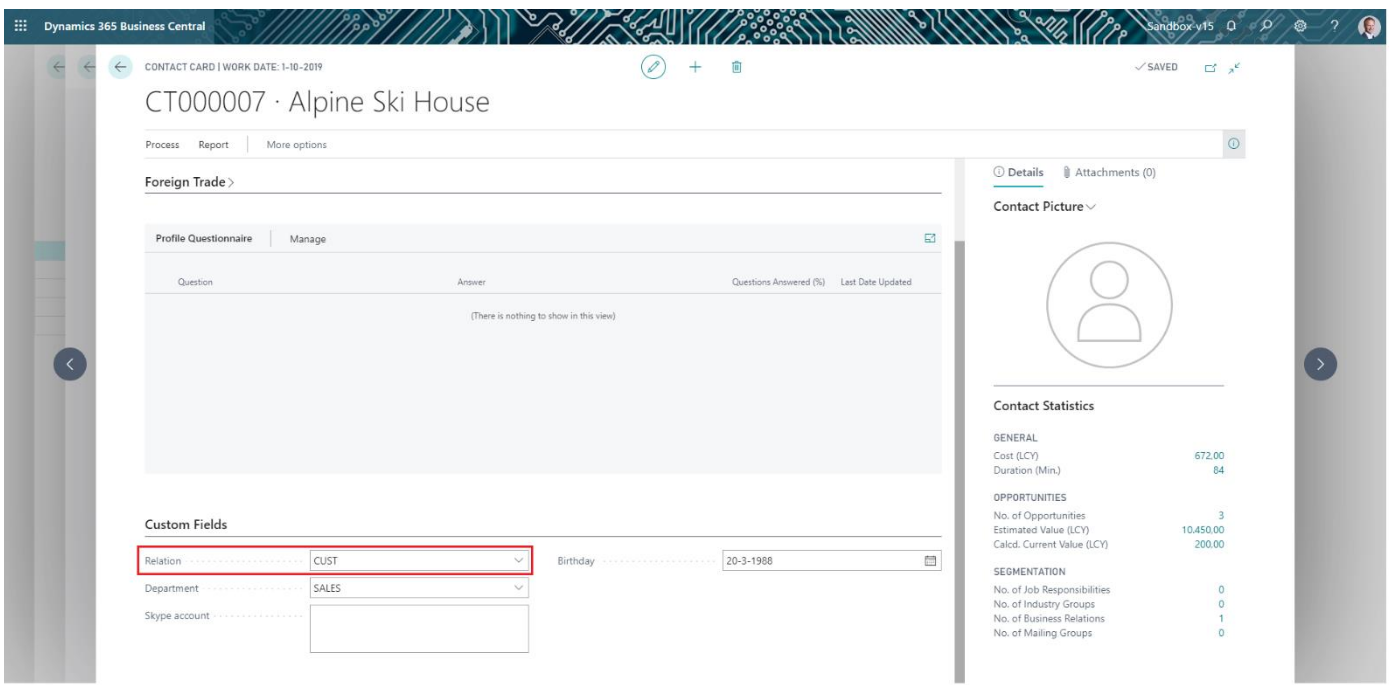
Custom Fields extension enables possibility to synchronize values of the same type and the same field number between contacts and customers (also between contacts and vendors) when these records are linked to each other (using Contact Business Relation).

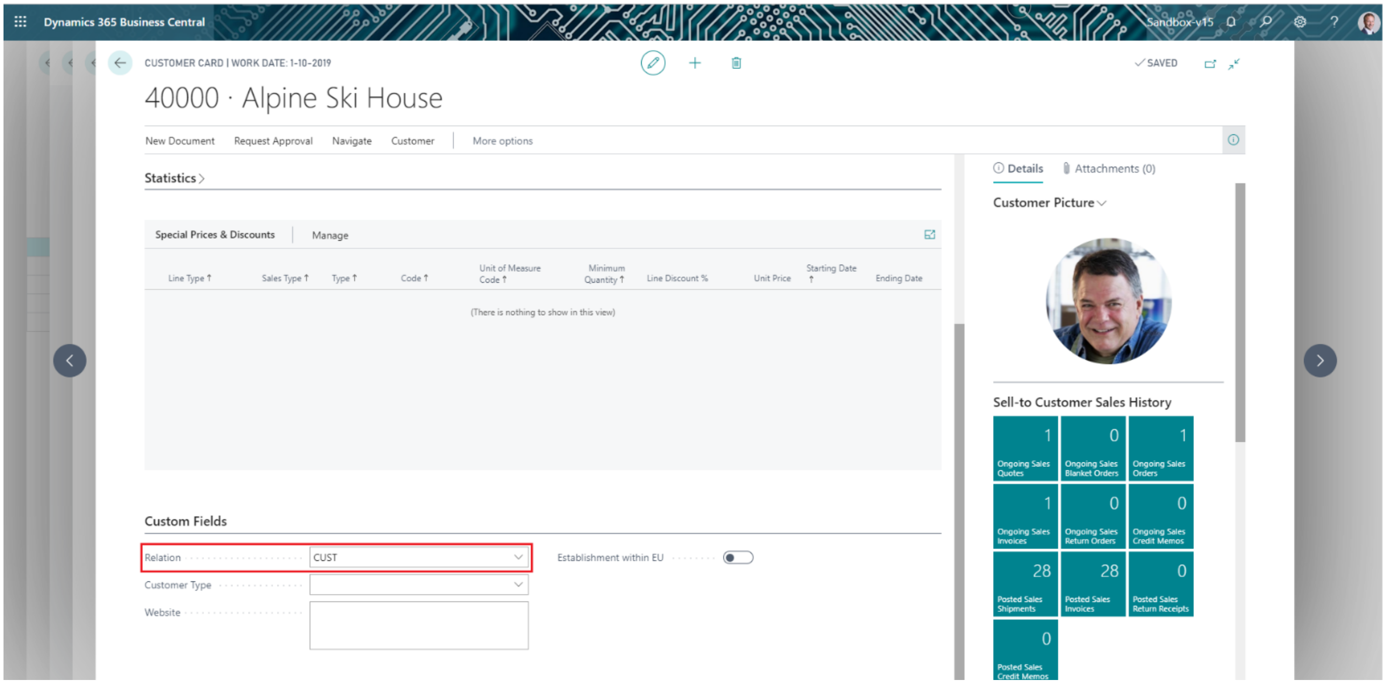
To set up synchronization for custom field of type Code between contacts and customers:

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:



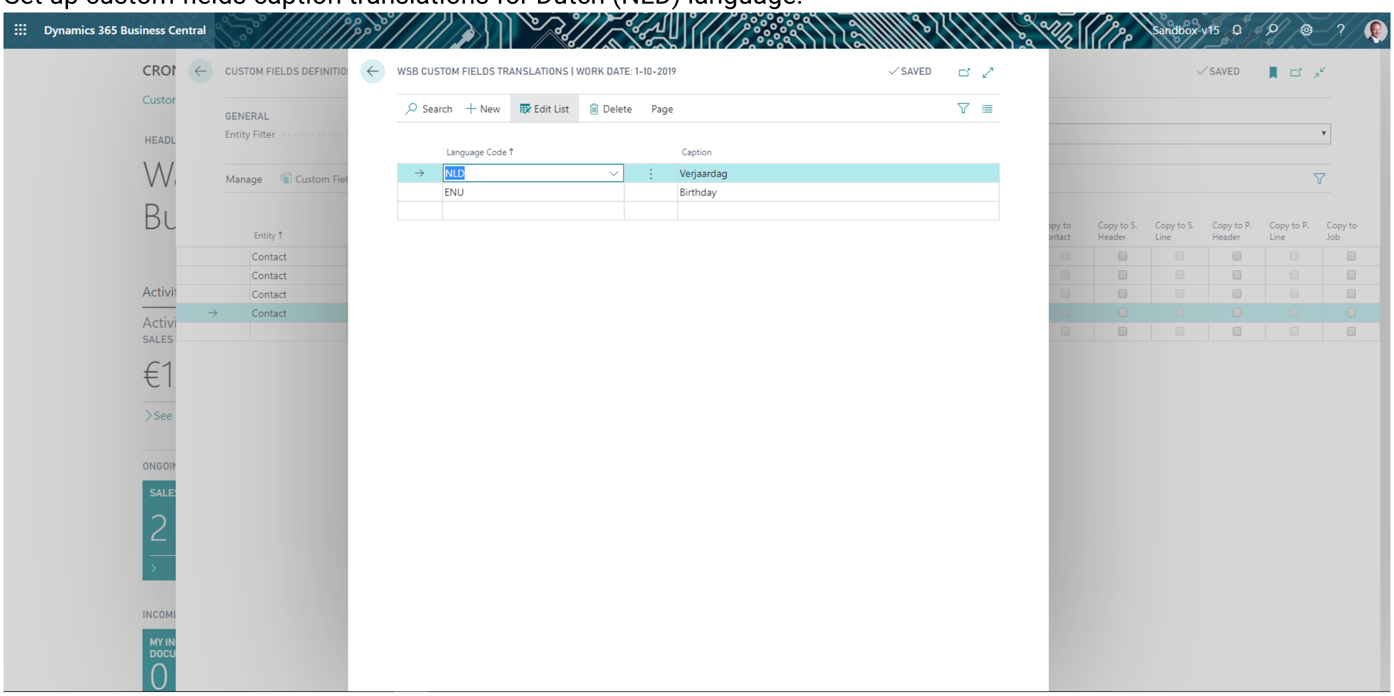
After the configuration is completed, the system will keep synchronized values if custom fields modified on a contact or customer:



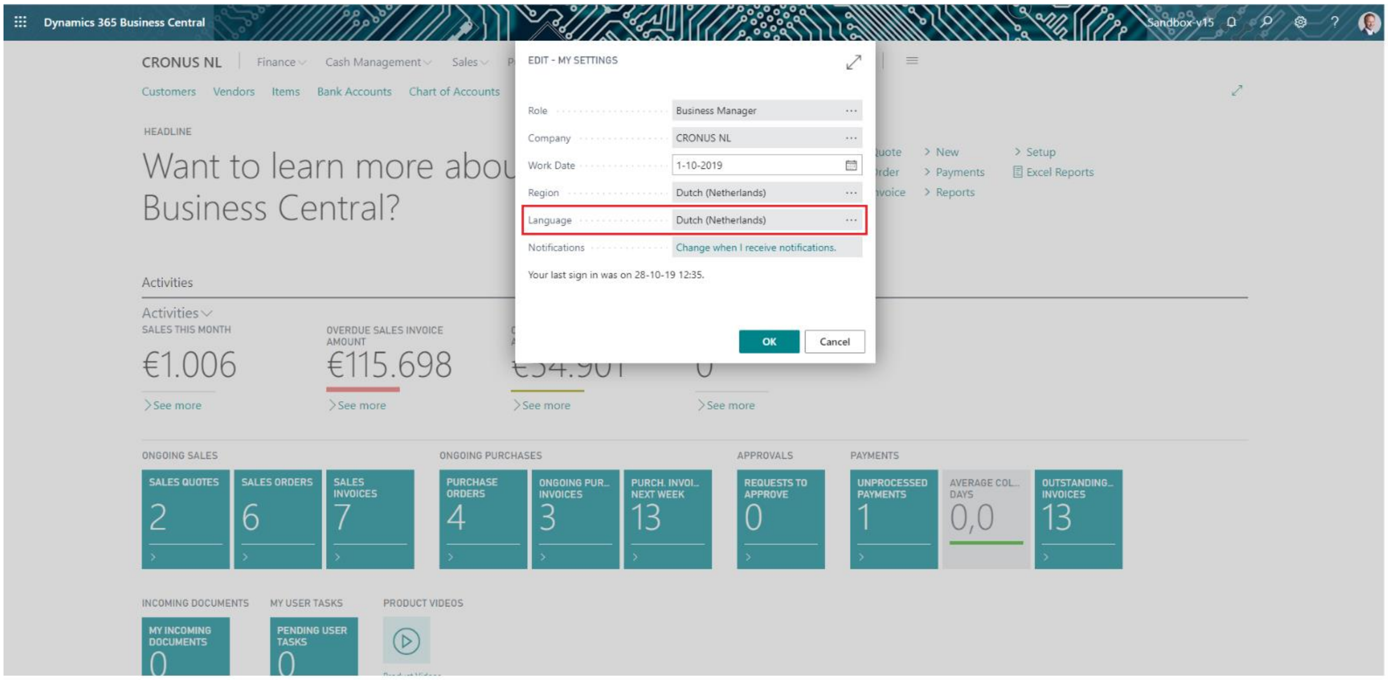


Scenario 3: Custom Fields in Dutch (Netherlands) system language

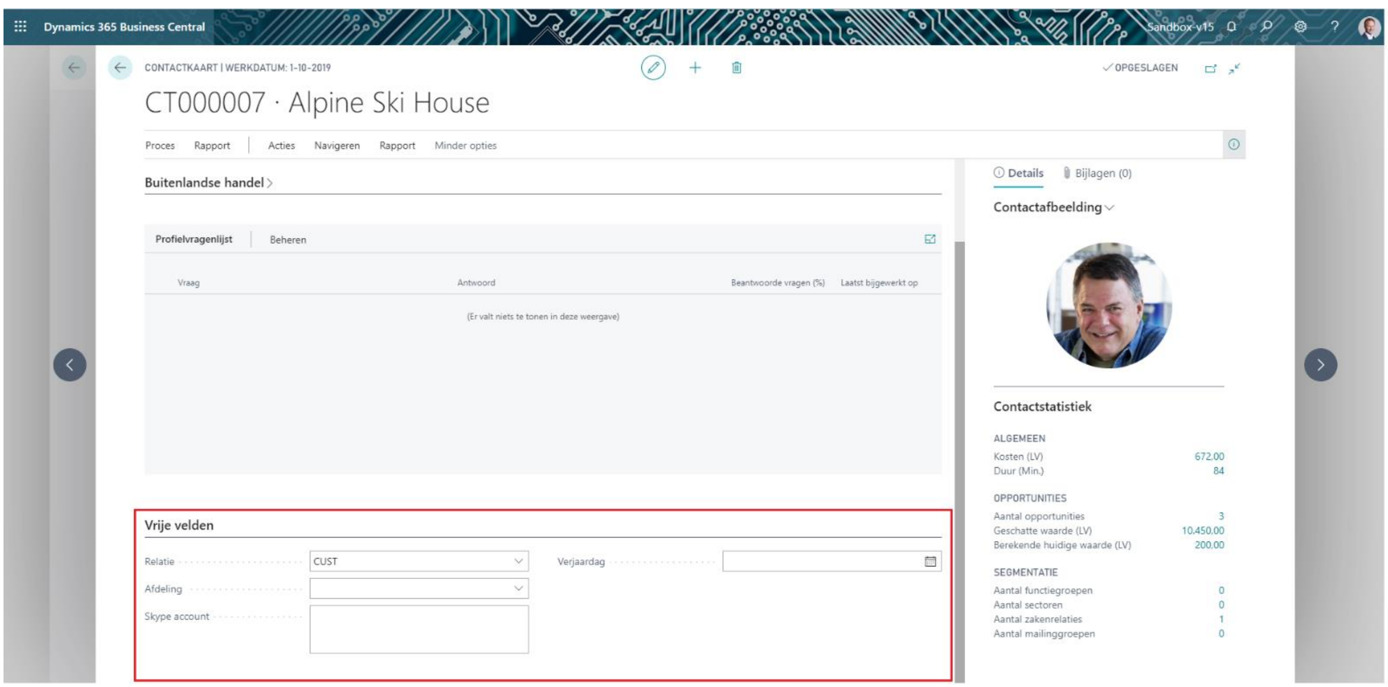
1. Set up custom fields caption translations for Dutch (NLD) language:



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



3. 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:

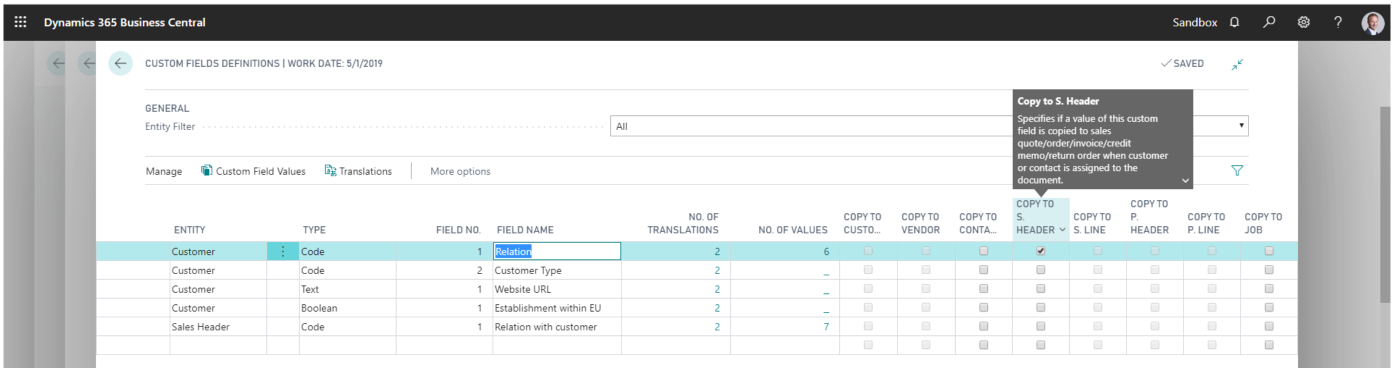


Scenario 4: Synchronization of custom fields between contacts, customers & vendors and their documents and jobs

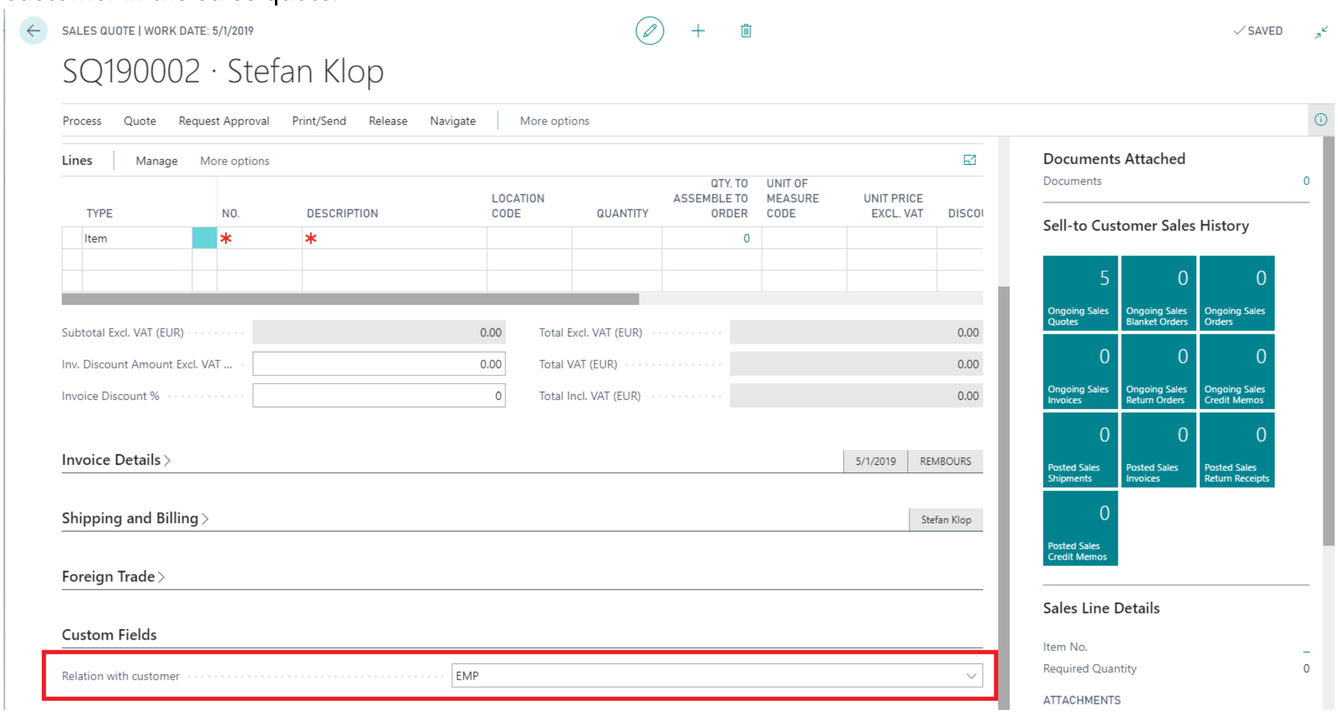
Custom Fields extension enables possibility to transfer values of a contact, customer or vendor to the header of their documents, like sales quote and purchase order or jobs (only for customer).

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:



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.



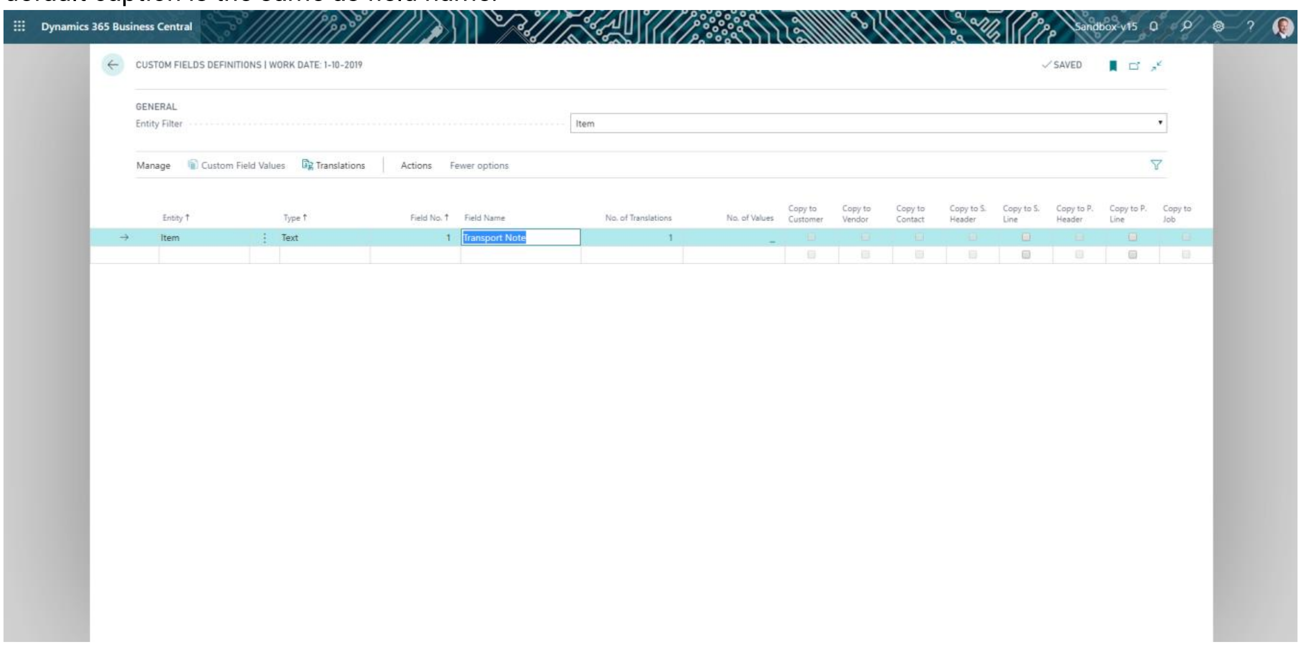
This same case is applicable for transferring values from vendors to purchase documents and customers to jobs.

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

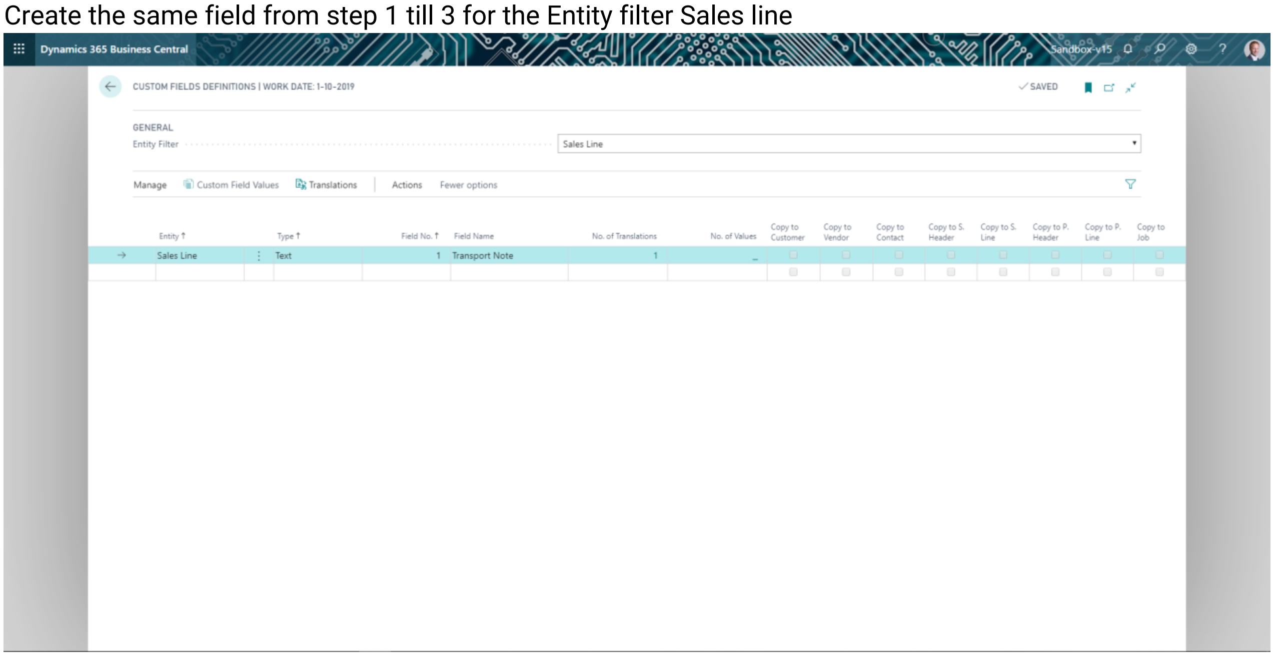
Custom Fields extension enables possibility to transfer values of an item to a sales or purchase line

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

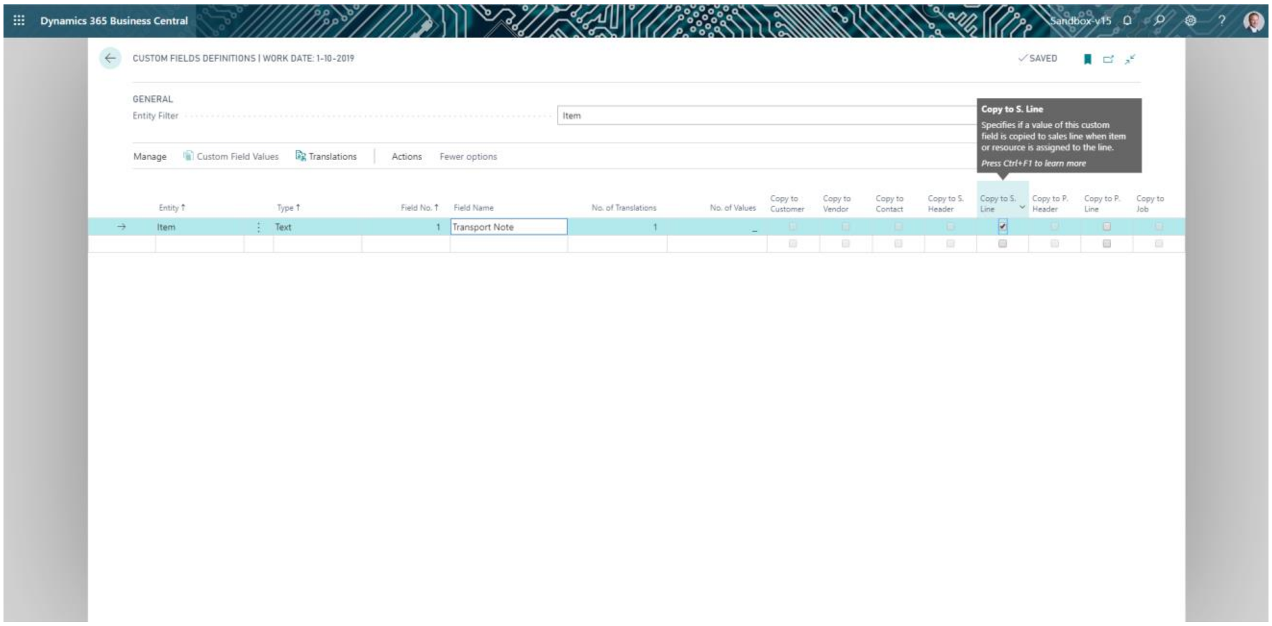
1. Choose the Item as Entity Filter on the Custom Field Definitions page.
2. Add a new line, change the Type field to Text. The system will predefine Field No. but user can change it. Specify the Field Name as Transport Note
3. When the line inserted, the system will automatically add English (ENU) caption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



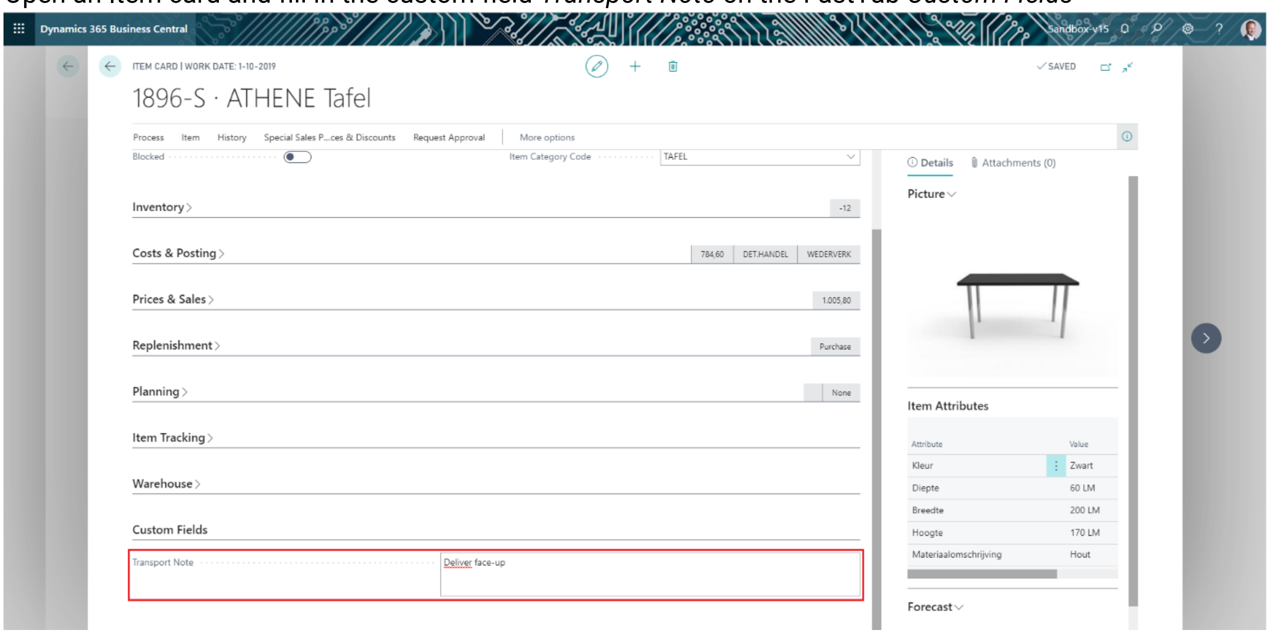
4. Create the same field from step 1 till 3 for the Entity filter Sales line



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



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



8. 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