User Guide

Easy Custom Field Extender for Dynamics 365 Business Central

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1. About

The Easy Custom Field Extender for Microsoft Dynamics 365 Business Central app allows users to add up to Add up to 3 custom fields to different entities. Custom fields allow users to customize the system and keep track of any special information relevant to their individual company. Customize your system as you see fit. No coding needed!

Entities Supported (3 fields per entity):

- Customer
- Vendor
- Item
- Sales Header (i.e. Sales Quote, Sales Order, Sales Invoice, and Sales Credit Memo)
- Purchase Header (i.e. Purchase Order, Purchase Invoice, and Purchase Credit Memo)

Features:

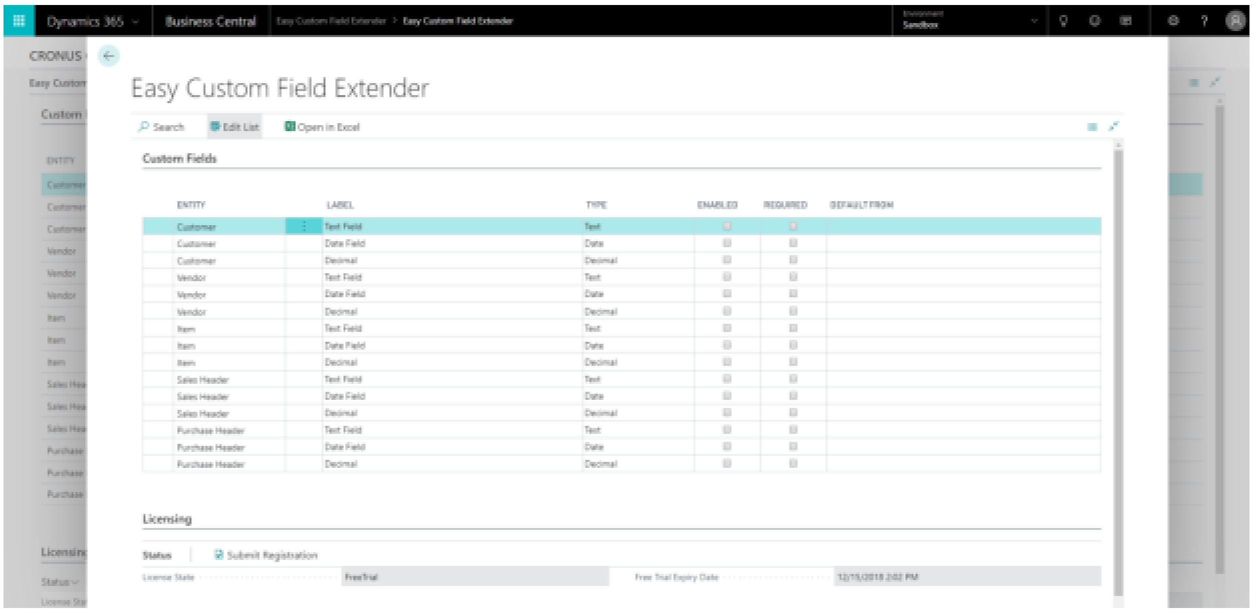
- Customize label names
- Data type options available: Text, Date and Decimal
- Create required fields
- Add default fields to transactions (ex. can have a custom field on the Vendor card that defaults on every Purchase Invoice created for that vendor).

For more information, please visit: https://www.websan.com/easy-custom-field-extender

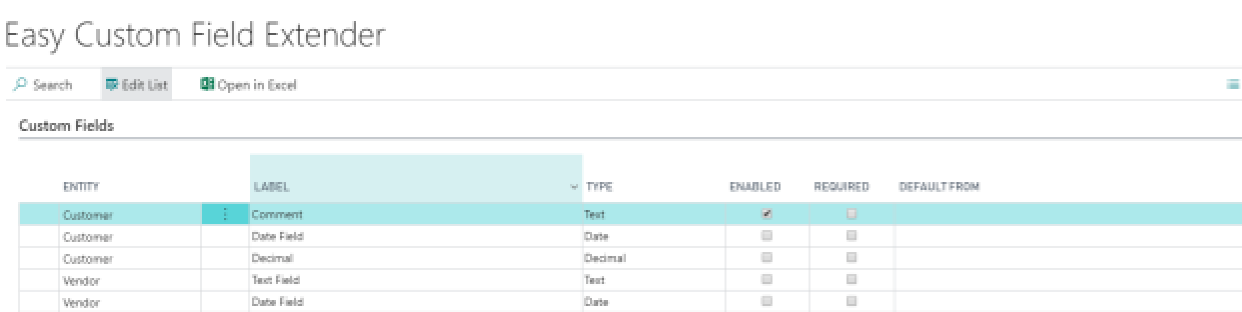
2. Configuration & Functionality

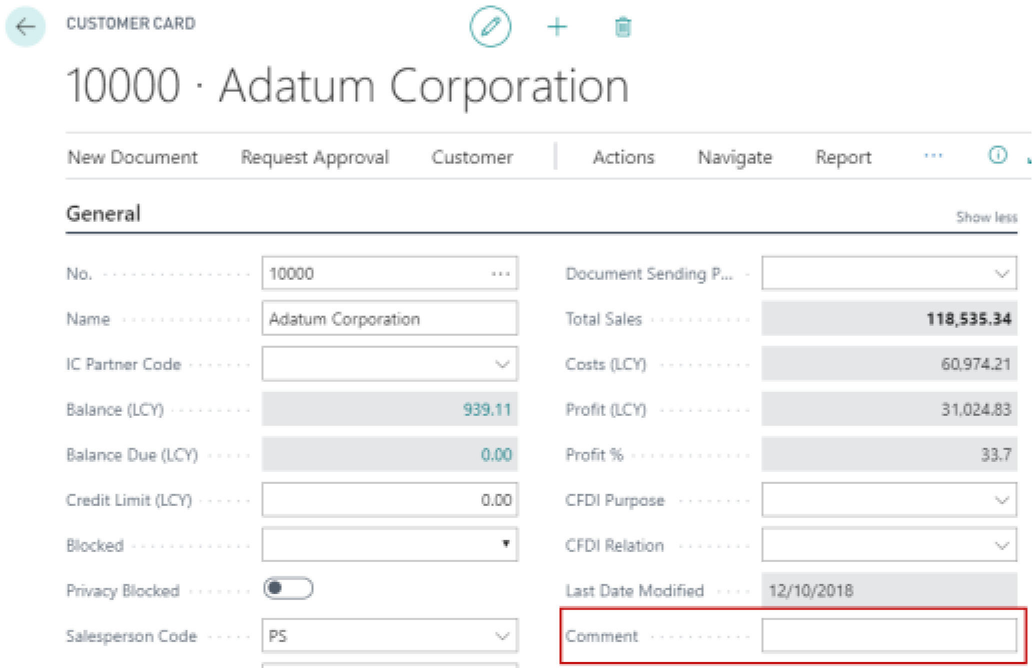
The application can be registered within the Assisted Setup. However, no formal app specific setup is required to begin using the application.

The app can be accessed by searching for Easy Custom Field Extender in the universal search.

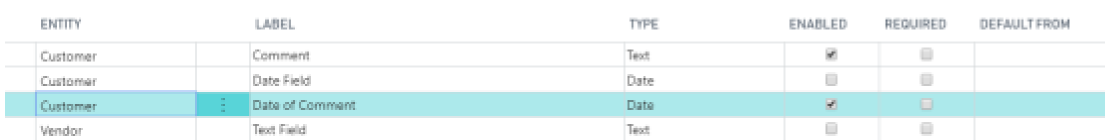


To have a custom field in an entity, the ‘Enabled’ field must be checked. When unchecking this field, related defaults will be unlinked unless the user declines the prompt. The Entity column is for reference. The fields will show in the actual entity in the same order as in the list here. Labels are the name of the field in the entity. The label text can be changed and must be unique per entity.





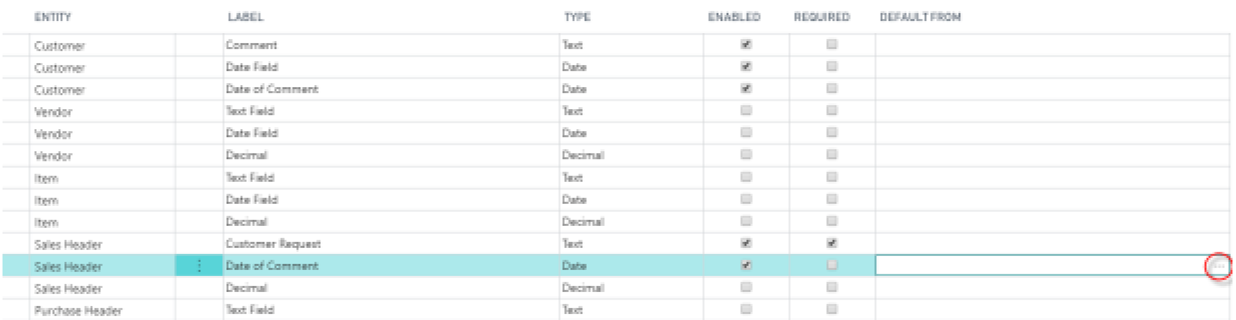
Type represents the data type of the field. When this is changed, the data in this field will be erased from all records and any defaults associated with it will be unlinked unless the user declines the prompt



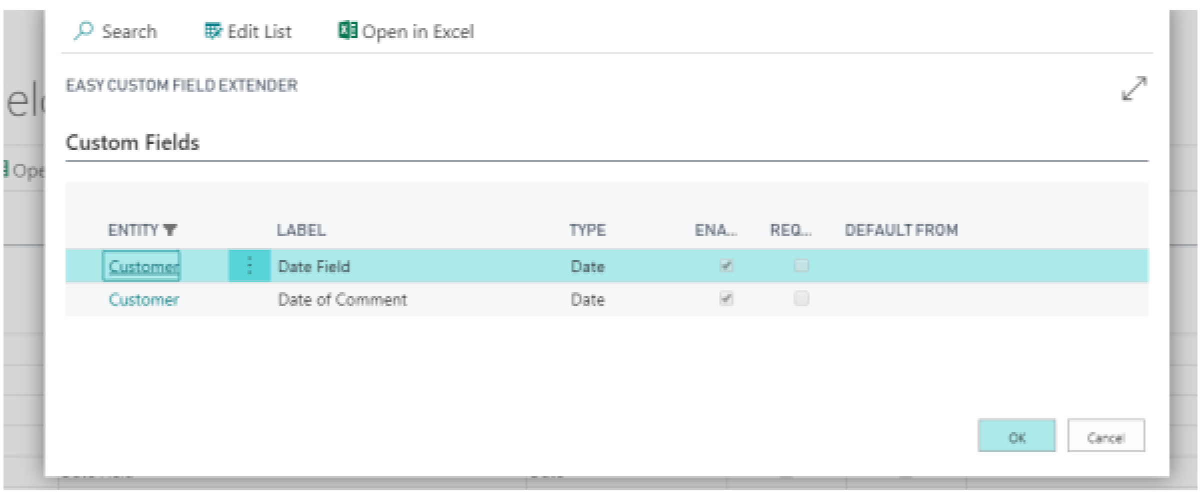
The required checkbox will cause a red asterisk to show next to the field when it is empty. Required fields in an entity that can be posted will not allow posting to go through until it is populated.

The default from column let's the user make a one-way connection from a customer/vendor custom field to a sales/purchase custom field. When established between two enabled fields, whenever the user makes a document from a customer/vendor or manually sets them in a document, the data will copy from the custom field in the customer/vendor to the document's respective custom field. The default from field can only be set from the lookup (three dots button after clicking the field), typing in the box will give an error. The lookup will show the fields that can be used to default from, which will be customer or vendor fields with the same data type. Once a field is selected, the label of the field used to default from will show in the Default From column.

1. Click the default from field and select the ellipsis



2. There are 2 customer fields with the same type available, click on the row and ok to save (or the customer entity on the row)



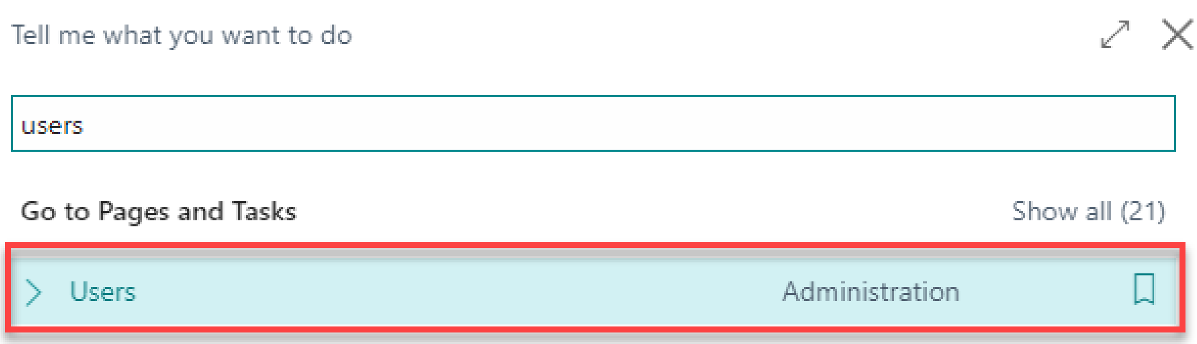
3. The default from column will update with the name of the field chosen

4. Security

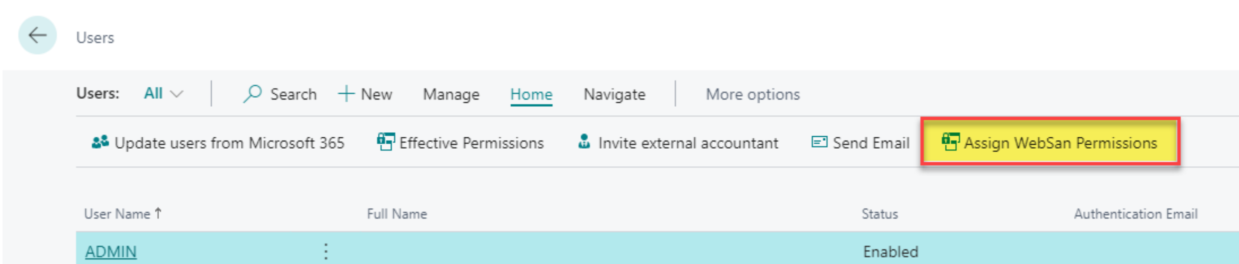
The application, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in Auto Permission security functionality. When a user with the proper credentials installs an App, the Auto Permission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the Auto Permission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.

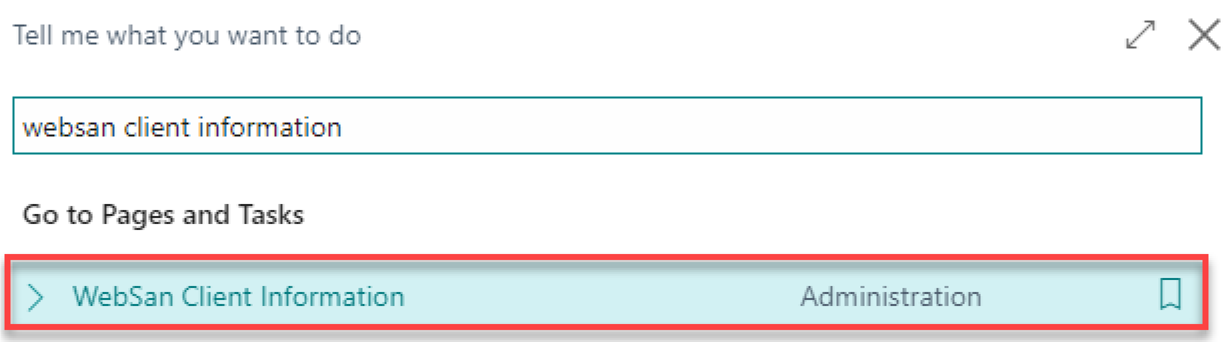


In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



5. Registration

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.



In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.