



Quickly achieve business process compliance and data accuracy with fields' customization in your Dynamics system.



If you are responsible for IT or managing data quality and accuracy in your organization, you will recognize these issues:

“Our standard system does not reflect the controls we want to put in place.”

“Sometimes there is a need for additional flexibility in customizing fields, which can increase our flexibility.”

“We need an easy to use system that we can set-up and customize easily and run quickly.”

Data compliance overview

- ▶ Seven areas in Dynamics can be selected and made mandatory fields – customer, vendor, General Ledger account, Items, Resource, Jobs and Fixed Assets
- ▶ Out of the box for Business Central with an easy to use interface

Personalized data overview

- ▶ Enable 14 fields (including the master card) to customize item, customer and vendor data
- ▶ Mixture of text, decimals and Boolean fields available to customize
- ▶ Customized fields are then propagated to Sales and Purchase documents and for statistical analysis and workflows
- ▶ Out of the box for Business Central with an easy to use interface



Update existing records in bulk

For the mandatory fields functionality, select the table you want to update using the “Update Records” function. The “Blocked Records” button shows a list of blocked records in error to be rectified.



Set up the tables you wish to affect

The accelerator automatically sets up the seven tables to modify and fourteen fields to customize

- Blocking field
- Blocking value
- Enabling or disabling your information message for users by table
- Adding additional information



Select fields you wish to control and customize

For each field you can choose to add free fields or activate control on Insert and/or on Modify.



Set up the tables you wish to affect

An out-of-the box solution delivered for a quick start:

- Specific tables and fields
- Preconfigured solution
- Specific range
- User manual

CUSTOMER CARD | DATE DE TRAVAIL: 1/27/2022

30000 · John Haddock Insurance Co.

New Document Request Approval Navigate Customer Plus d'options

General

No. 30000 Blocked All Total Sales 6,142.90

Name John Haddock Insurance Privacy Blocked Costs (LCY) 3,221.90

IC Partner Code Salesperson Co. PS Profit (LCY) 2,921.00

Balance (LCY) 349,615.40 Responsibility C... Profit % 47.6

Balance Due (L... 110,020.08 Service Zone C... N Last Date Modi... 3/5/2020

Credit Limit (LCY) 0.00 Document Sen... Disable Search ...

Address & Contact MO2 4RT Miss Patricia Doyle

Additional information No

Invoicing DOMESTIC DOMESTIC LARGE ACC

Payments

Payment Terms * Payment Terms Code

Mandatory Fields Errors

Field Payment Terms Code

Customer Picture

Sell-to Customer Sales History

| | | | |
|-----------------------------|------------------------------|------------------------|------------------------|
| 0 | 0 | 5 | 0 |
| Ongoing Sales Quotes | Ongoing Sales Blanket Orders | Ongoing Sales Orders | Ongoing Sales Invoices |
| 0 | 0 | 5 | 2 |
| Ongoing Sales Return Orders | Ongoing Sales Credit Memos | Posted Sales Shipments | Posted Sales Invoices |

SALES ORDER | DATE DE TRAVAIL: 1/27/2022

1002 · The Cannon Group PLC

Process Release Posting Prepare Order Request Approval Print/Send Navigate Plus d'options

General

No. 1002 Posting Date 1/27/2022 Requested Del... 1/27/2022

Customer Name Cannon Group PLC Order Date 1/27/2022 External Docu... 2/6/2022

Contact Mr. Andy Teal Due Date 2/6/2022

Customer Additional Information

My Own Text F... Text Value 1 My Own Share... SC1 My Own Share... 2/25/2020

My Own Text F... Text Value 2

My Own Boole... My Own Date ... 2/25/2020

Sell-to Customer Sales History

| | | | |
|-----------------------------|------------------------------|------------------------|------------------------|
| 0 | 0 | 6 | 0 |
| Ongoing Sales Quotes | Ongoing Sales Blanket Orders | Ongoing Sales Orders | Ongoing Sales Invoices |
| 0 | 0 | 6 | 3 |
| Ongoing Sales Return Orders | Ongoing Sales Credit Memos | Posted Sales Shipments | Posted Sales Invoices |
| 1 | 1 | | |
| Posted Sales Receipts | Posted Sales Credit Memos | | |

Customer Details

Customer No. 10000

Data compliance

Each time a record is inserted, or modified, all fields will be controlled according to the Mandatory Fields' setup. If at least one of these fields is not filled (0 for decimals, false for Booleans, empty for texts or codes etc.), a list of fields in error will be created and the record will be blocked.

This means that the setup blocking field will take the setup blocked value and a List of fields in error will be visible on the record card.

Personalized data

Once setup is complete, all selected fields will be available in Customers, Item and Vendor cards into the Additional Information FastTab.

All can be used as regular fields.

All information contained in customers, vendors and items will be propagated to sales and purchase documents when created and can be modified into the document itself.

For example, posting a sales order will propagate information to a shipment and invoice.

Speak to Prodware about getting your Dynamics 365 Business Central system fully compliant with your own data quality and accuracy needs.



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