



CUSTOM FIELDS

IN MICROSOFT DYNAMICS 365
BUSINESS CENTRAL

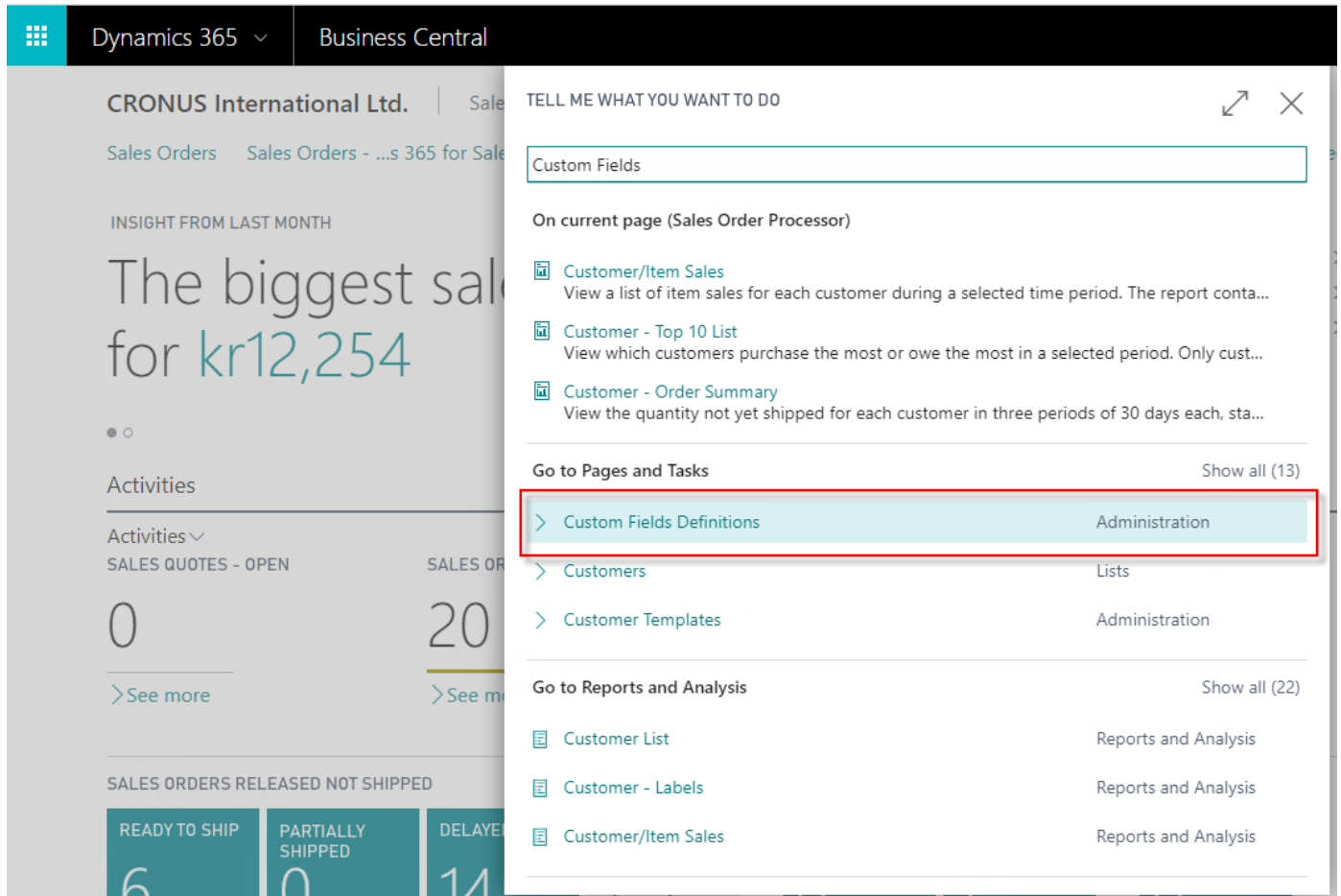
HOW TO USE

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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.

← CUSTOM FIELDS DEFINITIONS

GENERAL

Entity Filter Contact

Manage Process Actions Less options

ENTITY	TYPE	FIELD NO.	FIELD NAME	NO. OF TRANSLATIO...	NO. OF VALUES	COPY TO CUS...	COPY TO VEN...	COPY TO CON...
Contact	Code	1	Relation	2	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	2	Department	2	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	3	PSBC Account No.	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Text	1	Skype Account	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Date	1	Birthday	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

← CUSTOM FIELDS DEFINITIONS

GENERAL

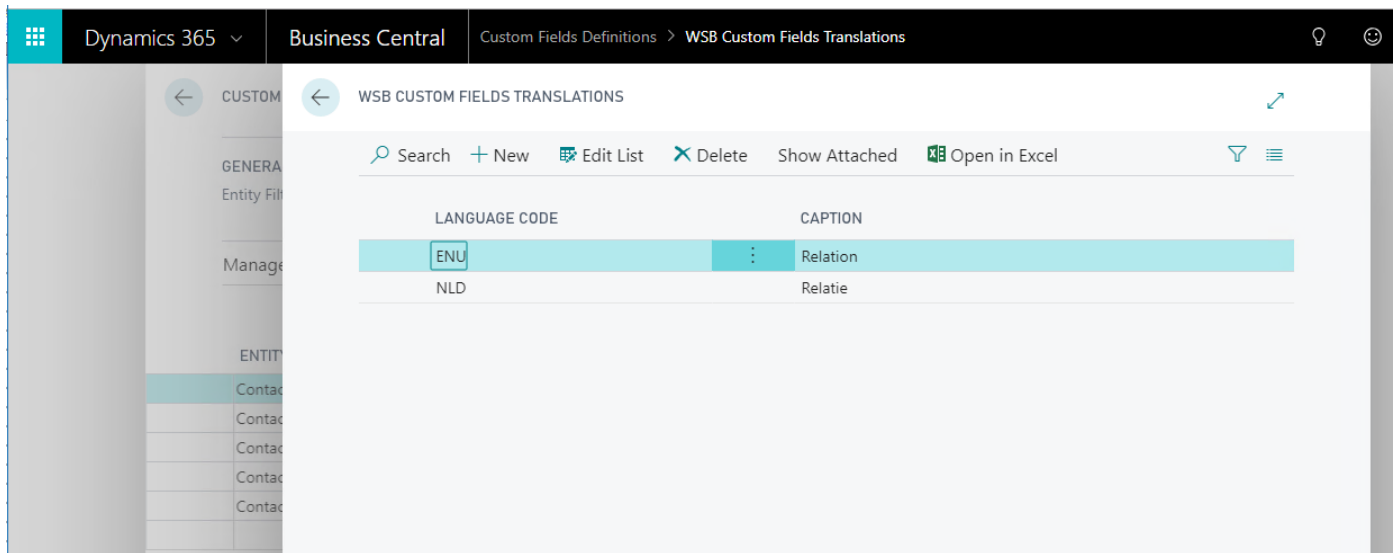
Entity Filter Contact

Manage Process Actions Less options

Custom Field Values Translations

ENTITY	TYPE	FIELD NO.	FIELD NAME	TRANSLATIO...	VALUES	CUS...	VEN...	COPY TO CON...
Contact	Code	1	Relation	2	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	2	Department	2	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	3	PSBC Account No.	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Text	1	Skype Account	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Date	1	Birthday	2	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

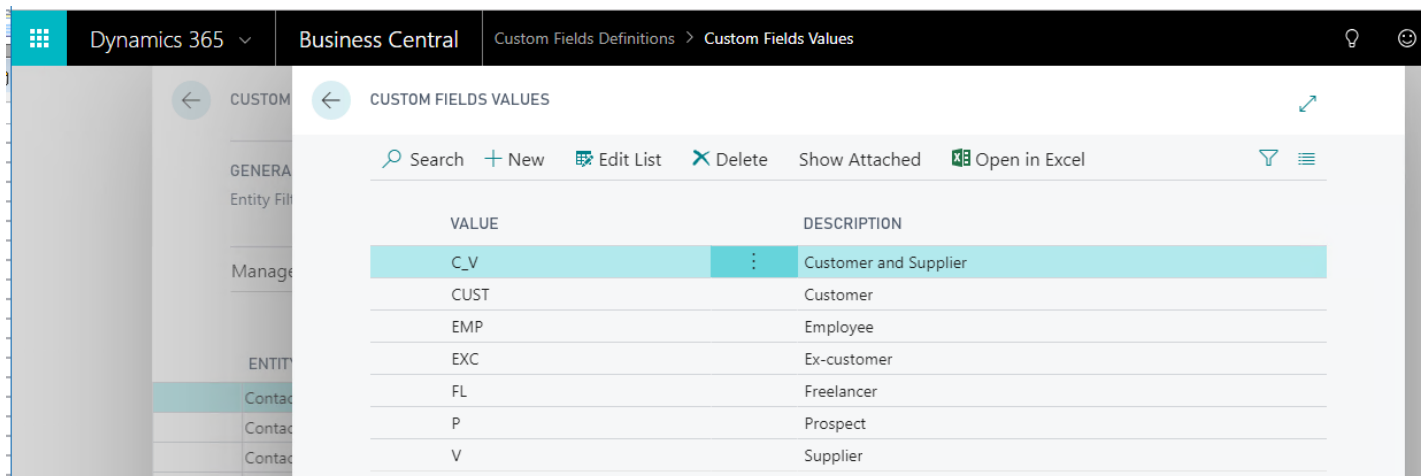
The example below shows captions in English and Dutch languages defined for the same custom field:



The screenshot shows the 'WSB CUSTOM FIELDS TRANSLATIONS' page in Dynamics 365 Business Central. The page has a navigation pane on the left with 'CUSTOM FIELDS' selected. The main area displays a table with two columns: 'LANGUAGE CODE' and 'CAPTION'. The table contains two rows: one for 'ENU' with a caption 'Relation' and one for 'NLD' with a caption 'Relatie'. Above the table are buttons for 'Search', '+ New', 'Edit List', 'Delete', 'Show Attached', and 'Open in Excel'.

LANGUAGE CODE	CAPTION
ENU	Relation
NLD	Relatie

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:



The screenshot shows the 'CUSTOM FIELDS VALUES' page in Dynamics 365 Business Central. The page has a navigation pane on the left with 'CUSTOM FIELDS' selected. The main area displays a table with two columns: 'VALUE' and 'DESCRIPTION'. The table contains seven rows: 'C_V' (Customer and Supplier), 'CUST' (Customer), 'EMP' (Employee), 'EXC' (Ex-customer), 'FL' (Freelancer), 'P' (Prospect), and 'V' (Supplier). Above the table are buttons for 'Search', '+ New', 'Edit List', 'Delete', 'Show Attached', and 'Open in Excel'.

VALUE	DESCRIPTION
C_V	Customer and Supplier
CUST	Customer
EMP	Employee
EXC	Ex-customer
FL	Freelancer
P	Prospect
V	Supplier

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:

CRONUS International Ltd.

Sales Orders Sales Orders

HEADLINE

Good evening

Activities

Activities

SALES QUOTES - OPEN

0

> See more

SALES ORDERS RELEASED

READY TO SHIP

6

PARTIAL SHIP

0

CONTACTS

Search New Manage Process Show Attached Open in Excel

NO.	TERRITORY CODE	RELATION	DEPARTME...	PSBC ACCOUNT NO.	SKYPE ACCOUNT	BIRTHDAY
CT200081	SW					
CT200021	NWAL					
CT100212	SWAL					
CT100223	FOREIGN					
CT200006	SWAL					
CT100211	S					
CT100006	EANG	EMP	DEV	AC 120798	skype_acc	11/14/1980
CT200057	EANG					
CT200116	EANG					
CT200118	EANG					
CT100011	FOREIGN					
CT100190	FOREIGN					
CT200008	FOREIGN					
CT200119	FOREIGN					
CT200047	FOREIGN					
CT200104	FOREIGN					
CT200134	FOREIGN					
CT000087	SE					

Custom fields on Contacts List page

Dynamics 365 Business Central Contacts > CT100006 · A. Gibson's Law Firm

CONTACT CARD

CT100006 · A. Gibson's Law Firm


Process Report Show Attached Page More options

Profile Questionnaire		Manage	QUESTIONS ANSWERED (%)	LAST DATE UPDAT
QUESTION	ANSWER			
Company Ownership	Stock Exchange			1/31/2
No. of employees	1..99			1/31/2

Custom Fields

Relation	EMP	Skype Account	skype_acc
Department	DEV	Birthday	11/14/1980
PSBC Account N...	AC 120798		

Contact Picture



Contact Statistics

GENERAL

Cost (LCY)	0.00
Duration (Min.)	0

OPPORTUNITIES

No. of Opportunities	1
Estimated Value (LCY)	200,000.00
Calcd. Current Value (LCY)	600.00

SEGMENTATION

No. of Job Responsibilities	0
No. of Industry Groups	1
No. of Business Relations	2
No. of Mailing Groups	0

Custom fields on the Contact Card page

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

Microsoft Dynamics 365 Business Central | Contacts > CT100006 · A. Gibson's Law Firm

CONTACT CARD

CT100006 · A. Gibson's Law Firm

Process | Report | Show Attached | Page | Actions | Navigate | Report | Less options

Profile Questionnaire		Manage	QUESTIONS ANSWERED (%)	LAST DATE UPDAT
QUESTION	ANSWER			
Company Ownership	Stock Exchange			1/31/2
No. of employees	1..99			1/31/2

VALUE	DESCRIPTION
C_V	Customer and Supplier
CUST	Customer
EMP	Employee
EXC	Ex-customer
FL	Freelancer
+ New	Select from full list

Custom Fields

Relation EMP

Department DEV

PSBC Account N... AC 120798

Skype Account skype_acc

Birthday 11/14/1980

Scenario 2: Synchronization of custom fields between contacts and customers

WSB 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

Entity Filter: Customer

Manage Process Actions Less options

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

ENTITY	TYPE	FIELD NO.	FIELD NAME	NO. OF TRANSLATIONS	NO. OF VALUES	COPY TO CUSTO...	COPY TO VEND...	COPY TO CONTA...
Customer	Code	1	Relation	2	7	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Customer	Code	2	Customer Type	2	5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Text	1	Website URL	2	-	<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"/>

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

CONTACT CARD
CT100006 · A. Gibson's Law Firm

Process Report Show Attached Page Actions Navigate Report Less options

Profile Questionnaire | Manage

QUESTION	ANSWER	QUESTIONS ANSWERED (%)	LAST DATE UPDAT
Company Ownership	Stock Exchange		1/31/2
No. of employees	1.99		1/31/2

Custom Fields

Relation: EMP
Department: DEV
PSBC Account N...: AC 120798
Skype Account: skype_acc
Birthday: 11/14/1980

Contact Picture

Contact Statistics

GENERAL
Cost (LCY): 0.00
Duration (Min.): 0

OPPORTUNITIES
No. of Opportunities: 1
Estimated Value (LCY): 200,000.00
Calcd. Current Value (LCY): 600.00

SEGMENTATION
No. of Job Responsibilities: 0
No. of Industry Groups: 1
No. of Business Relations: 2
No. of Mailing Groups: 0

CUSTOMER CARD
C00010 · A. Gibson's Law Firm

New Document | Request Approval | Customer | Show Attached | Actions | Navigate

Invoicing Show more

VAT Registration No. ...
Copy Sell-to Addr. to ... Company

POSTING DETAILS

Gen. Bus. Posting Gro... EU
Customer Posting Gr... EU

PRICES AND DISCOUNTS

Customer Price Group ...
Customer Disc. Group ... LARGE ACC

*** Payments >**

Shipping > Partial

Custom Fields

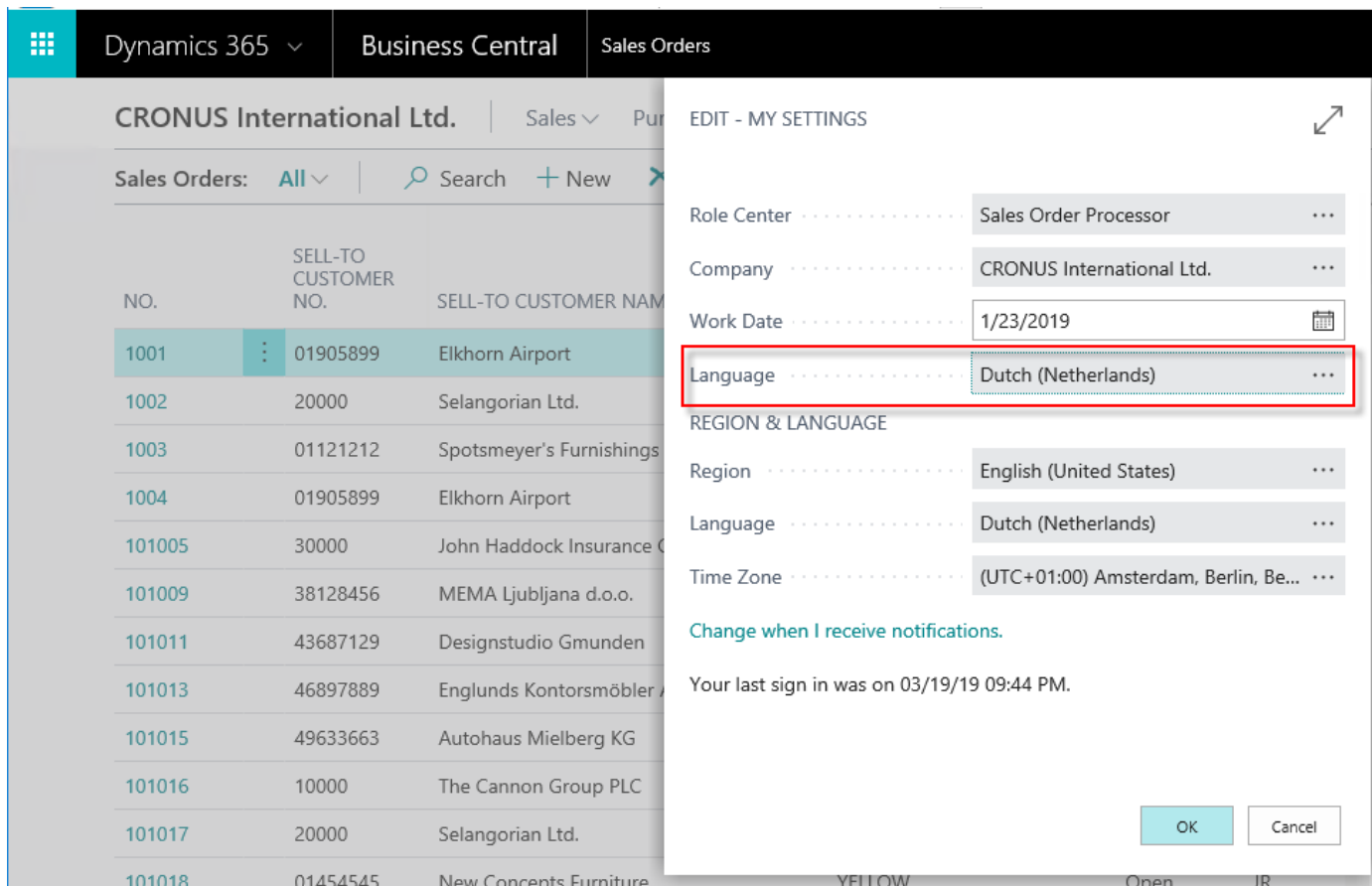
Relation EMP
Customer Type TRADER
Remarks
Establishment within ... ☒

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

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

LANGUAGE CODE	CAPTION
ENU	Birthday
NLD	Verjaardag

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



CRONUS International Ltd. | Sales ▾ | Pur

Sales Orders: All ▾ | Search + New

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME
1001	01905899	Elkhorn Airport
1002	20000	Selangorian Ltd.
1003	01121212	Spotsmeyer's Furnishings
1004	01905899	Elkhorn Airport
101005	30000	John Haddock Insurance Co.
101009	38128456	MEMA Ljubljana d.o.o.
101011	43687129	Designstudio Gmunden
101013	46897889	Englunds Kontorsmöbler
101015	49633663	Autohaus Mielberg KG
101016	10000	The Cannon Group PLC
101017	20000	Selangorian Ltd.
101018	01454545	New Concepts Furniture

EDIT - MY SETTINGS

Role Center Sales Order Processor ...

Company CRONUS International Ltd. ...

Work Date 1/23/2019

Language Dutch (Netherlands) ...

REGION & LANGUAGE

Region English (United States) ...

Language Dutch (Netherlands) ...

Time Zone (UTC+01:00) Amsterdam, Berlin, Be... ..

[Change when I receive notifications.](#)

Your last sign in was on 03/19/19 09:44 PM.

OK Cancel

- 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:

CONTACT CARD

CT200081 · Greg Chapman

Process	Report	Gekoppeld weergeven	Pagina	Meer opties
Educational level		Bachelor		1/31/2020
Marital Status		Children		1/31/2020
Sex		Male		1/31/2020

Vrije velden

Relatie Skype

Department Verjaardag

PSBC Account No.

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

WSB 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.

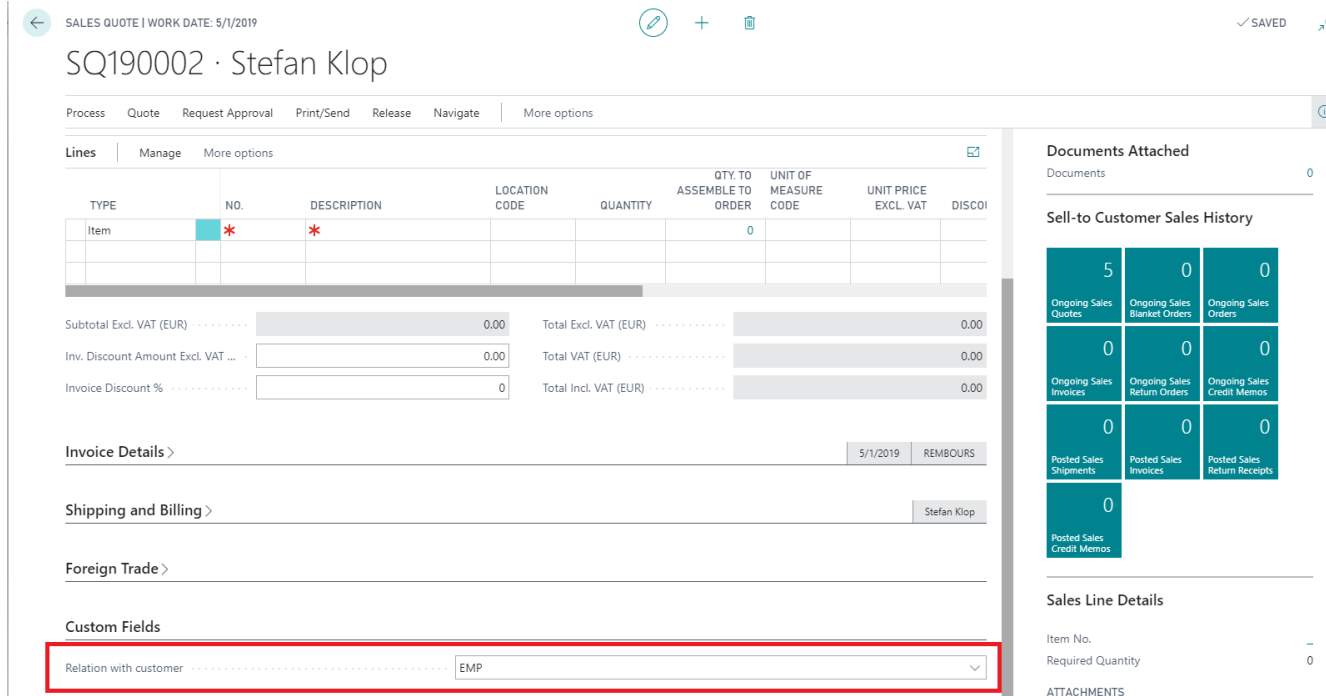
1. Set up custom fields for Sales Header entity as described in Scenario 2.
2. Choose the Customer as Entity Filter on the Custom Field Definitions page.
3. Add custom fields and set Copy to S. Header checkbox (sales header) on the fields which should be transferred to the sales quote:

CUSTOM FIELDS DEFINITIONS | WORK DATE: 5/1/2019

Entity Filter: All

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

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

Sales Line Details

Item No. Required Quantity 0

ATTACHMENTS

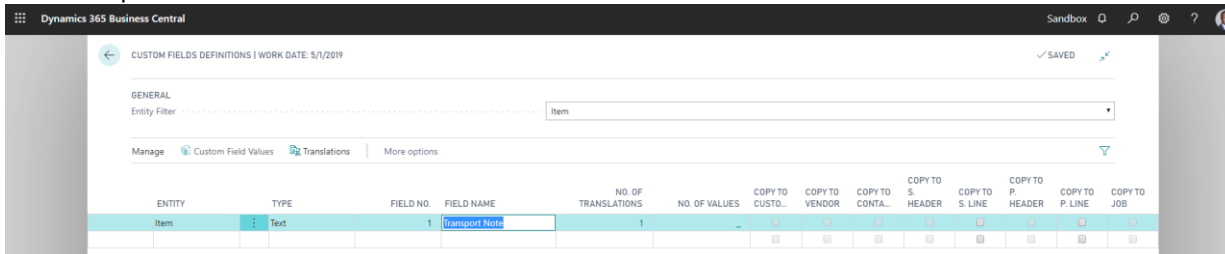
This same case is applicable for transferring values from vendors to purchase documents and customers to jobs.

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

WSB 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.



Dynamics 365 Business Central

Sandbox

CUSTOM FIELDS DEFINITIONS | WORK DATE: 5/1/2019

GENERAL

Entity Filter Item

Manage Custom Field Values Translations More options

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
Item	Text	1	Transport Note	1									

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

The screenshot shows the 'CUSTOM FIELDS DEFINITIONS' page in Dynamics 365 Business Central. The 'Entity Filter' is set to 'Sales Line'. A table lists the custom fields:

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 1	COPY TO P. HEADER	COPY TO P. LINE	COPY TO JOB
Sales Line	Text	1	Transport Note	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"/>

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

The screenshot shows the 'CUSTOM FIELDS DEFINITIONS' page with the 'Entity Filter' set to 'Item'. The table shows the custom field 'Transport Note' with the 'COPY TO S. LINE 1' checkbox checked. A tooltip explains: 'Copy to S. Line: Specifies if a value of this custom field is copied to sales line when item or resource is assigned to the line. Press Ctrl+F1 to learn more.'

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 1	COPY TO P. HEADER	COPY TO P. LINE	COPY TO JOB
Item	Text	1	Transport Note	1	-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

The screenshot shows the 'ITEM CARD' for '1896-S · ATHENE Tafel'. The 'Custom Fields' fasttab is active, and the 'Transport Note' field is filled with the text 'Deliver face-up'.

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