

## Custom Defined Fields


### App for Microsoft Dynamics 365 Business Central

Add custom fields to Microsoft Dynamics 365 Business Central. The app allows you to add up to 32 custom fields in different cards, with no coding needed.

#### How it works

The Custom Defined Fields app for Microsoft Dynamics 365 Business Central allows you to:

- ✓ activate the custom fields in a few seconds using the different types of data managed: dates, numbers, codes, etc.
- ✓ link the fields to a table for data validation
- ✓ select any existing table (e.g. Articles categories or Country codes ...) or define a new list of completely customized values / descriptions
- ✓ automatically propagate the values of the custom fields of customers and vendors on sales and purchase documents, inheriting the activated options



#### Quick guide:

1. configure and enable new fields
2. edit lists containing values for the new fields
3. copy the new fields on Sales / Purchase Header

To make the fields visible on the pages you can enable them from the appropriate setup by setting some simple options.



**NB**

Field names can be customized and can be translated into multiple languages.

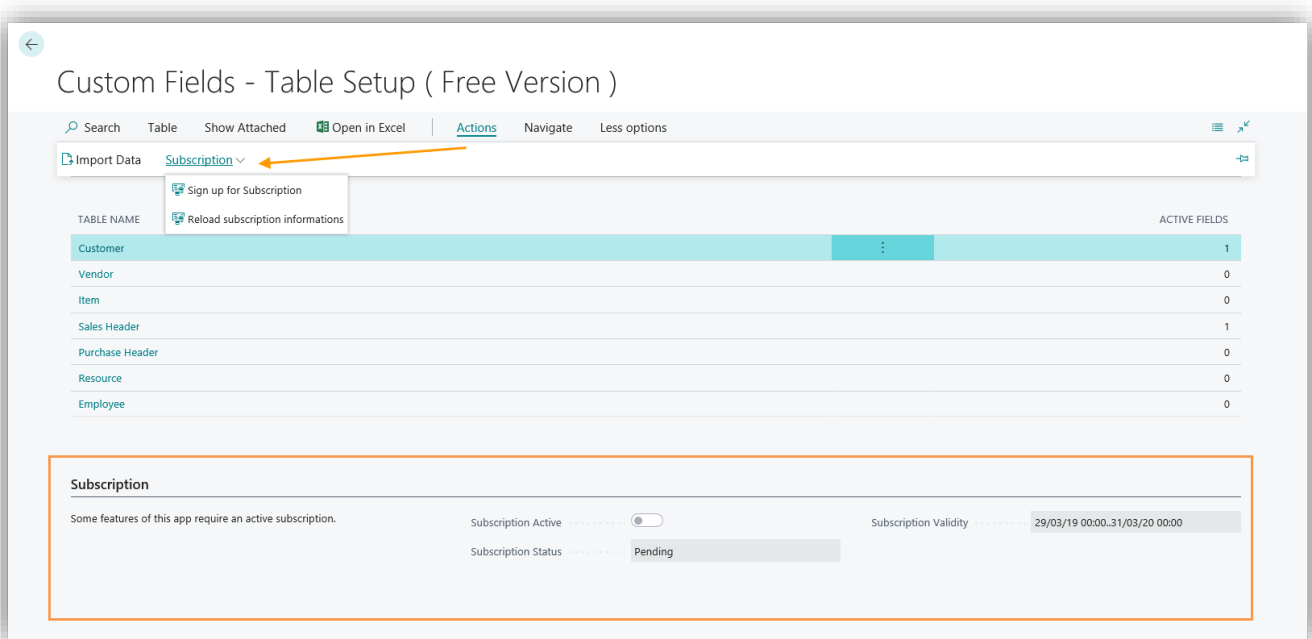


The custom fields are available for:

- ✓ Customer
- ✓ Vendor
- ✓ Item
- ✓ Sales header
- ✓ Purchase header
- ✓ Resource
- ✓ Employee

## Subscription

Some features of the Custom Defined Fields app require a subscription.



Custom Fields - Table Setup ( Free Version )

Search Table Show Attached Open in Excel Actions Navigate Less options

Import Data Subscription

Sign up for Subscription

Reload subscription informations

TABLE NAME	ACTIVE FIELDS
Customer	1
Vendor	0
Item	0
Sales Header	1
Purchase Header	0
Resource	0
Employee	0

Subscription

Some features of this app require an active subscription.

Subscription Active

Subscription Validity 29/03/19 00:00..31/03/20 00:00

Subscription Status Pending

The subscription can be activated from the Table Setup page by clicking on *Actions* -> *Subscription* or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard. In particular:

- **FREE** version: only one custom field can be entered
- **PRO** version: it is possible to enter all 32 available custom fields.



## Table setup

In *Custom Fields - Table Setup* you can see the tables involved:

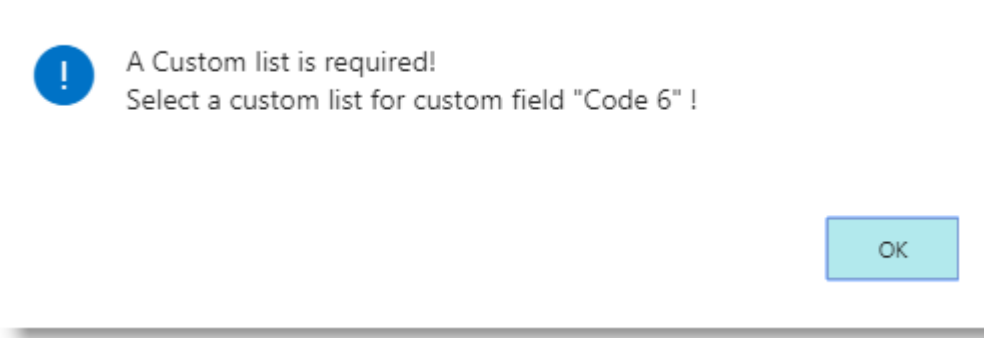
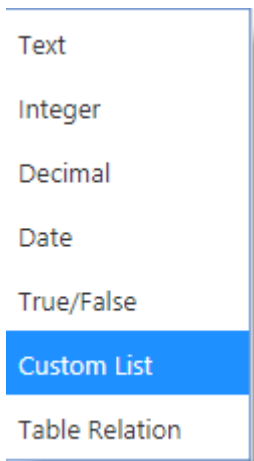
TABLE NAME	ACTIVE FIELDS
Customer	4
Vendor	0
Item	0
Sales Header	4
Purchase Header	0
Resource	0
Employee	0

**NB**

The column "Active fields" indicates the number of fields for which a setup has already been set.

In *Navigate-> Table-> User Defined Fields* it is possible to define and enable the fields. Selecting "Edit List" the page is modifiable:

TABLE NO.	ACTIVE	NAME	CAPTION	TYPE	LENGTH	TABLE RELATION	FIELD RELATION	TABLE RELATION - VISIBLE FIELD	CUSTOM LIST	TRANS... FIELD TO DOCUM
	<input type="checkbox"/>	Code 1		Custom List	30	0	0	No	LC01	<input type="checkbox"/>
18	<input checked="" type="checkbox"/>	Code 2	Gen Cond	Custom List	30	0	0	No	CG	<input checked="" type="checkbox"/>
18	<input type="checkbox"/>	Code 3		Custom List	30	0	0	No	LC02	<input type="checkbox"/>
18	<input type="checkbox"/>	Code 4		Table Relation	30	0	7	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Code 5		Table Relation	30	11	2	Yes		<input type="checkbox"/>
18	<input type="checkbox"/>	Code 6		Custom List	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Code 7		Custom List	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Code 8		Custom List	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Code 9		Custom List	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Code 10		Custom List	30	0	0	No		<input type="checkbox"/>
18	<input checked="" type="checkbox"/>	Number 1	Sub. Nr.	Integer	30	0	0	No		<input checked="" type="checkbox"/>
18	<input type="checkbox"/>	Number 2		Integer	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Number 3		Integer	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Number 4		Integer	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Number 5		Integer	30	0	0	No		<input type="checkbox"/>
18	<input checked="" type="checkbox"/>	Date 1	Start date serv. contract	Date	30	0	0	No		<input checked="" type="checkbox"/>
18	<input type="checkbox"/>	Date 2		Date	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Date 3		Date	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Date 4		Date	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Date 5		Date	30	0	0	No		<input type="checkbox"/>
18	<input checked="" type="checkbox"/>	Text 1	Service	Text	80	0	0	No		<input checked="" type="checkbox"/>
18	<input type="checkbox"/>	Text 2		Text	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Text 3		Text	30	0	0	No		<input type="checkbox"/>
18	<input type="checkbox"/>	Text 4		Text	30	0	0	No		<input type="checkbox"/>

FIELD	DESCRIPTION
Active	<p>Enable the setup line for the single field. The active fields are displayed in bold. To enable the line: <i>Process-&gt; Activate</i> or <i>Actions-&gt; Activation-&gt; Activate</i>. You can select multiple lines and activate them all together. N.B. To enable a Code field it is necessary to specify a Custom list:</p> 
Name	Name indicating the field TYPE (Code, Number, Date, Text, etc.). It is not editable. It will never appear on the page unless no label has been indicated for the active field.
Caption	Label that defines the name of the field that will appear on the page.
Type	<p>Type of field. The options are:</p>  <p>The code field type can be:</p> <ul style="list-style-type: none"> <li>▪ Custom list</li> <li>▪ Table relation</li> </ul>
Lenght	Length referred to Text fields (in other lines a default length of 30 is set)

<p>Table relation</p>	<p>If the "TABLE RELATION" type has been chosen, indicate the number of the Table to which the field should be related:</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p><input type="text" value="Search"/></p> <p>SELECT <span style="float: right;">↗</span></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">OBJECTID</th> <th style="width: 5%;">OBJECTTYPE ▼</th> <th style="width: 80%;">OBJECTNAME</th> </tr> </thead> <tbody> <tr><td>3</td><td>Table</td><td>Payment Terms</td></tr> <tr><td>4</td><td>Table</td><td>Currency</td></tr> <tr><td>5</td><td>Table</td><td>Finance Charge Terms</td></tr> <tr><td>6</td><td>Table</td><td>Customer Price Group</td></tr> <tr><td>7</td><td>Table</td><td>Standard Text</td></tr> <tr><td>8</td><td>Table</td><td>Language</td></tr> <tr><td>9</td><td>Table</td><td>Country/Region</td></tr> <tr><td>10</td><td>Table</td><td>Shipment Method</td></tr> <tr style="border: 2px solid orange;"><td>11</td><td>Table</td><td>Country/Region Translation</td></tr> <tr><td>13</td><td>Table</td><td>Salesperson/Purchaser</td></tr> <tr><td>14</td><td>Table</td><td>Location</td></tr> <tr><td>15</td><td>Table</td><td>G/L Account</td></tr> <tr><td>17</td><td>Table</td><td>G/L Entry</td></tr> <tr><td>18</td><td>Table</td><td>Customer</td></tr> <tr><td>19</td><td>Table</td><td>Cust. Invoice Disc.</td></tr> <tr><td>21</td><td>Table</td><td>Cust. Ledger Entry</td></tr> <tr><td>23</td><td>Table</td><td>Vendor</td></tr> <tr><td>24</td><td>Table</td><td>Vendor Invoice Disc.</td></tr> <tr><td>25</td><td>Table</td><td>Vendor Ledger Entry</td></tr> </tbody> </table> </div>	OBJECTID	OBJECTTYPE ▼	OBJECTNAME	3	Table	Payment Terms	4	Table	Currency	5	Table	Finance Charge Terms	6	Table	Customer Price Group	7	Table	Standard Text	8	Table	Language	9	Table	Country/Region	10	Table	Shipment Method	11	Table	Country/Region Translation	13	Table	Salesperson/Purchaser	14	Table	Location	15	Table	G/L Account	17	Table	G/L Entry	18	Table	Customer	19	Table	Cust. Invoice Disc.	21	Table	Cust. Ledger Entry	23	Table	Vendor	24	Table	Vendor Invoice Disc.	25	Table	Vendor Ledger Entry
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<p>Field relation</p>	<p>The relationship with the visible field must be defined for each table relationship:</p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>VISIBLE FIELDS LIST</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">NO.</th> <th style="width: 40%;">NAME</th> <th style="width: 50%;">CAPTION</th> </tr> </thead> <tbody> <tr style="border: 2px solid orange;"><td>1</td><td>Country/Region Code</td><td>Country/Region Code</td></tr> <tr style="border: 2px solid orange;"><td>2</td><td>Language Code</td><td>Language Code</td></tr> </tbody> </table> </div> <p>In addition, from <i>Field-&gt;Table Relation-Visible Fields</i> choose which individual fields to enable the relationship.</p>	NO.	NAME	CAPTION	1	Country/Region Code	Country/Region Code	2	Language Code	Language Code																																																			
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<p>Table Relation - Visible Field</p>	<p>The options are:</p> <ul style="list-style-type: none"> <li>▪ Yes: automatically compiled by the system if the relations from Field-&gt;Table Relation-Visible Fields are set</li> <li>▪ No: automatically compiled by the system if the relations from Field-&gt;Table Relation-Visible Fields are NOT set</li> </ul>																																																												

Custom list      If the "CUSTOM LIST" type has been chosen, indicate the list to which the field should be related:

Transfer field to to documents      By ticking the option, the changes will be shown on the Sales/Purchase Header. In the Sales/Purchase Header the copied fields will appear in light blue:

### Setup Custom Fields - SALES HEADER

🔍 Search
📄 Edit List
Process
Field
Show Attached
📄 Open in Excel

TABLE NO. ▼	ACTI...	NAME	CAPTION	TYPE
36	<input type="checkbox"/>	Code 10		Custom List
36	<input checked="" type="checkbox"/>	<b>Number 1</b>	Sub Nr.	Integer
36	<input type="checkbox"/>	Number 2		Integer
36	<input type="checkbox"/>	Number 3		Integer
36	<input type="checkbox"/>	Number 4		Integer
36	<input type="checkbox"/>	Number 5		Integer
36	<input checked="" type="checkbox"/>	<b>Date 1</b>	Serv. start date	Date
36	<input type="checkbox"/>	Date 2		Date
36	<input type="checkbox"/>	Date 3		Date
36	<input type="checkbox"/>	Date 4		Date
36	<input type="checkbox"/>	Date 5		Date
36	<input checked="" type="checkbox"/>	<b>Text 1</b>	Service	Text
36	<input type="checkbox"/>	Text 2		Text
36	<input type="checkbox"/>	Text 3		Text
36	<input type="checkbox"/>	Text 4		Text
36	<input type="checkbox"/>	Text 5		Text
36	<input type="checkbox"/>	True/False 1	Verified	True/False
36	<input type="checkbox"/>	True/False 2		True/False
36	<input type="checkbox"/>	True/False 3		True/False

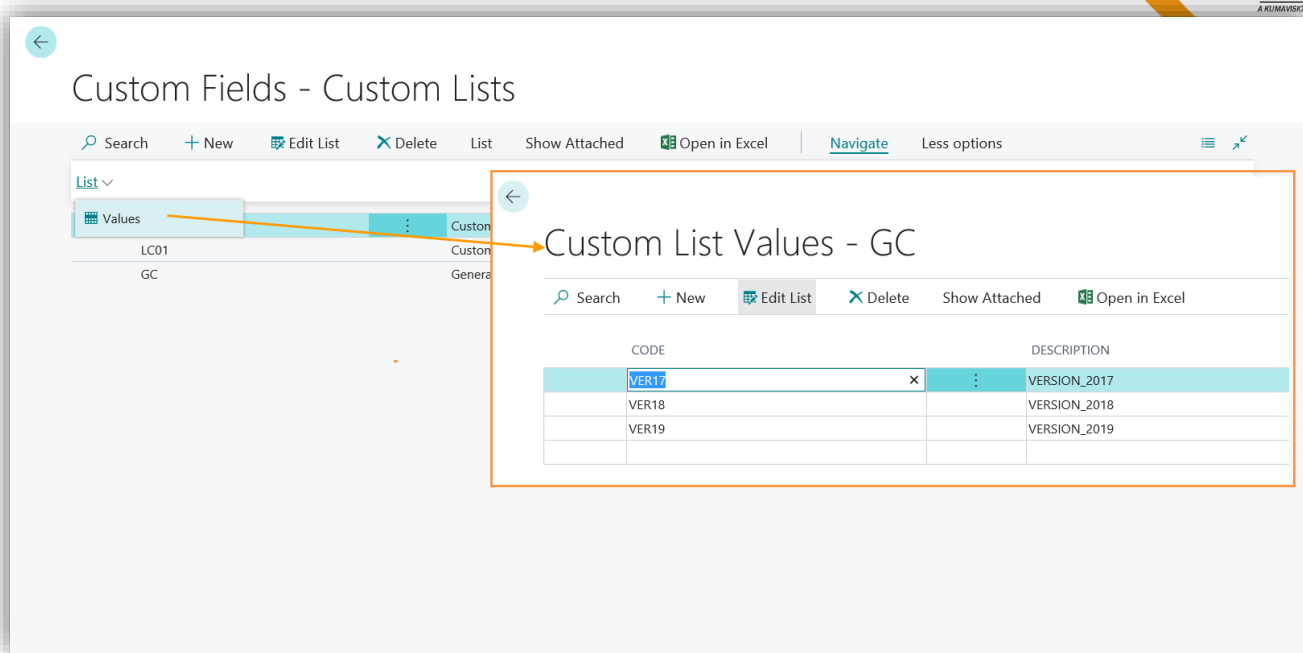
From *Field-> Fields Translation* you can define the translations..

## List Setup

In *Custom Fields - Custom lists* you can define the lists that can be used in the Code fields and than assign values.

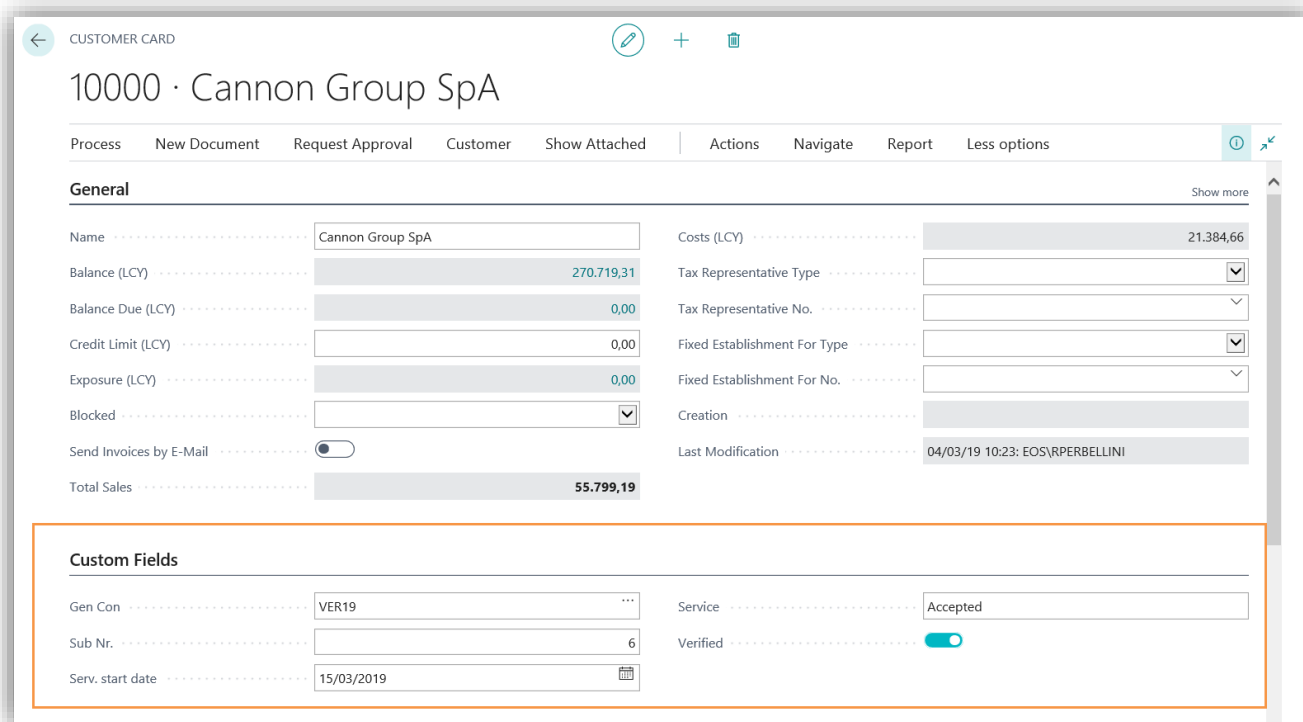
For each new list it is necessary to set a code and a description. Then go to *Navigate-> List-> Values*:





## Custom Fields Tab

Once configured and activated, the fields are shown in the Custom fields Tab of the selected pages. Example:



**NB**

During the posting the Custom Fields Tab of the order will be transferred to the invoice.

