Introduction

Mandatory Field Setup enables you to setup that certain fields on records in a table must be specified. You choose a table, a condition field and value, and which fields that are mandatory - and optionally which value each field should have. If you select a conditional field, the content of this field moderates whether the set of required fields should be checked. If the mandatory fields do not meet the conditions, a consequence can be setup per table.

In example it is possible to setup that Customers having 'Customer Posting Group' "DENMARK" must have 'Country/Region Code' set to "DK". If this is not the case, the field 'Blocked' will be set to "All".
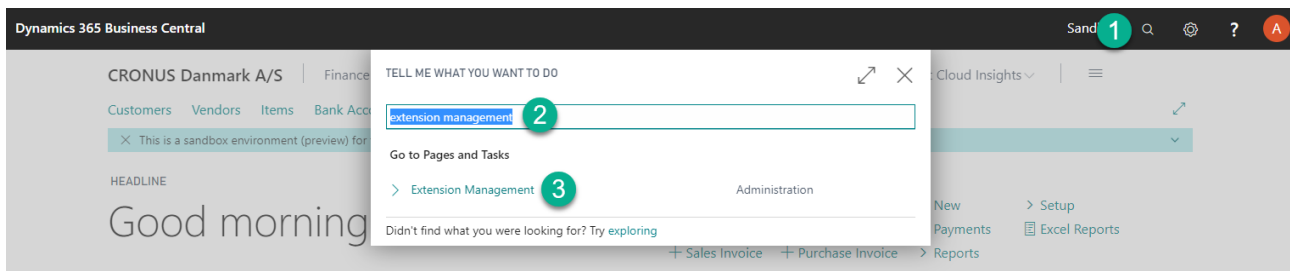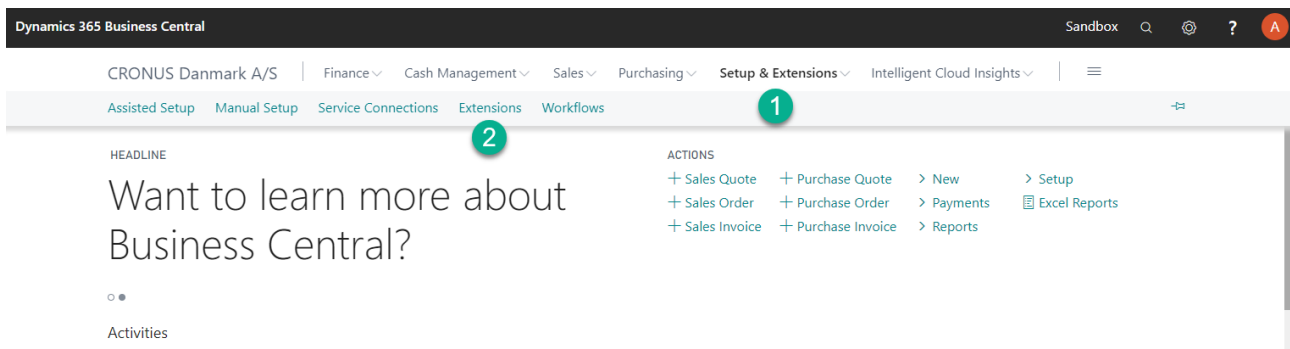
-- More information --

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How to install

Install Mandatory Fields from the Extension Management Page. Access this page by using search.
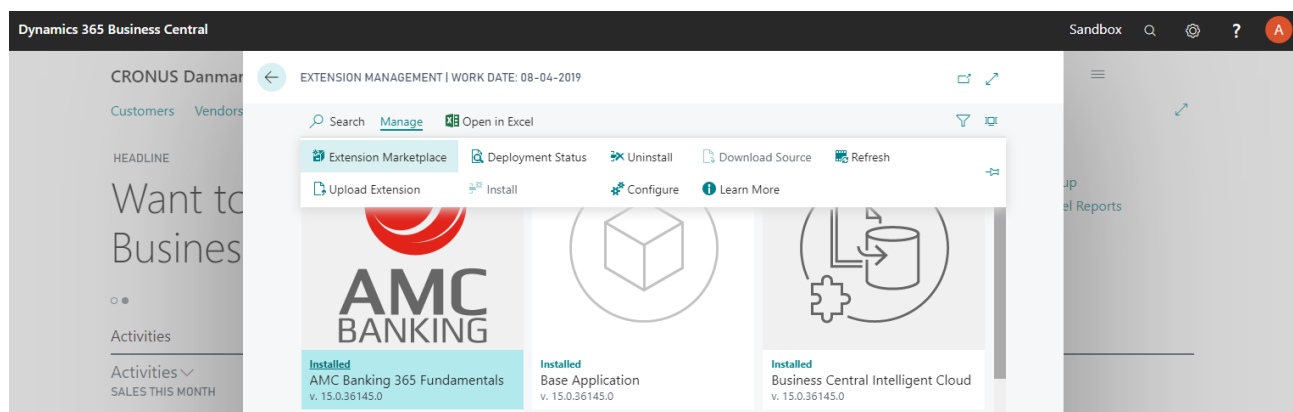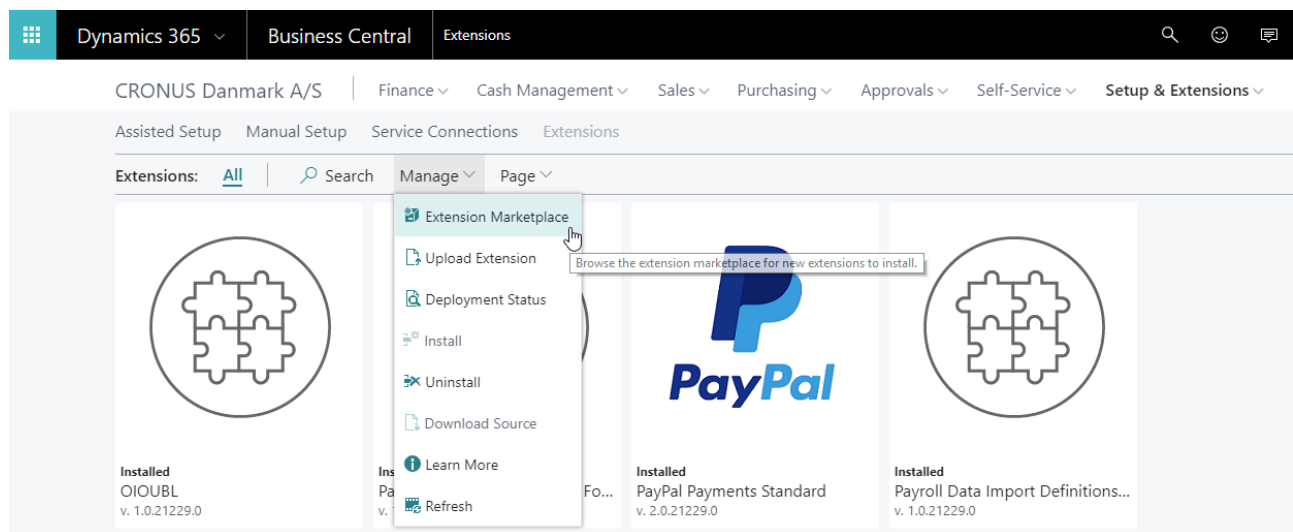

Page can also be accessed from the Business Manager Role Center, under the menu "Setup & Extensions"
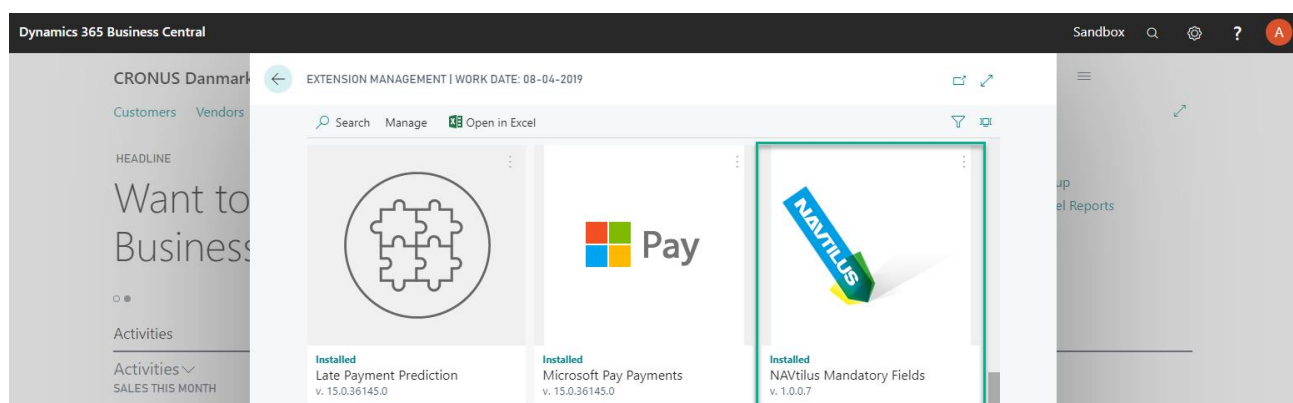
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Browse "Extension Marketplace" and locate the extension "Mandatory Fields".

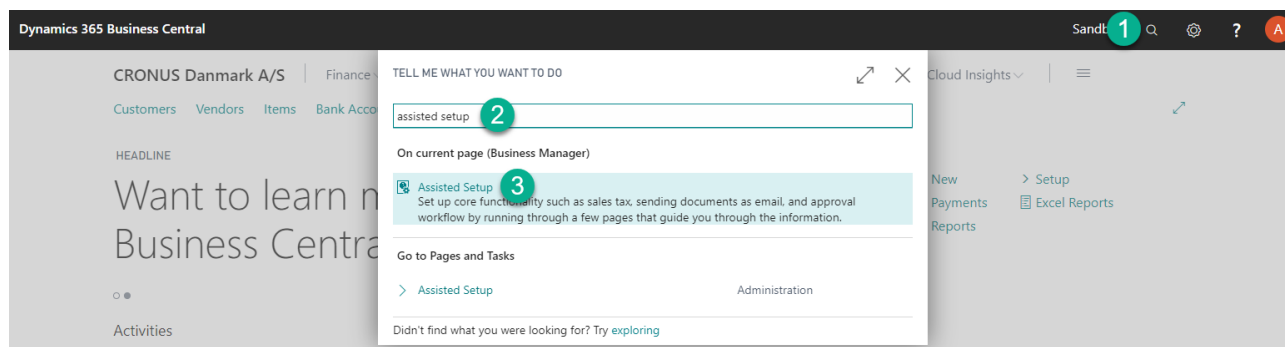Once found Click "Get it now" and proceed to install.

After successfull installation and refresh of the page the extension shows up on the Extensions page.
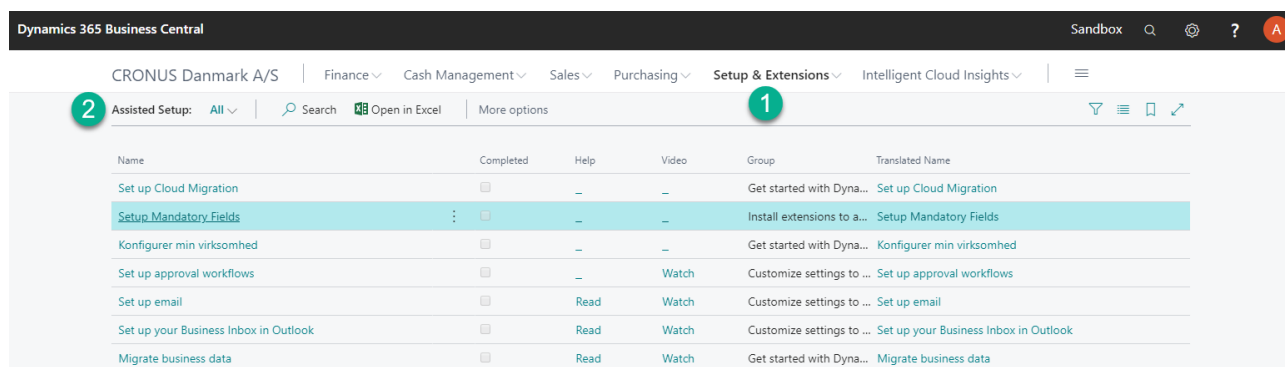

After successful installation users must logout and login again, to activate the new extension.

How to setup – Assisted Setup

Setup can be done using the Assisted Setup. Access this page by using search.

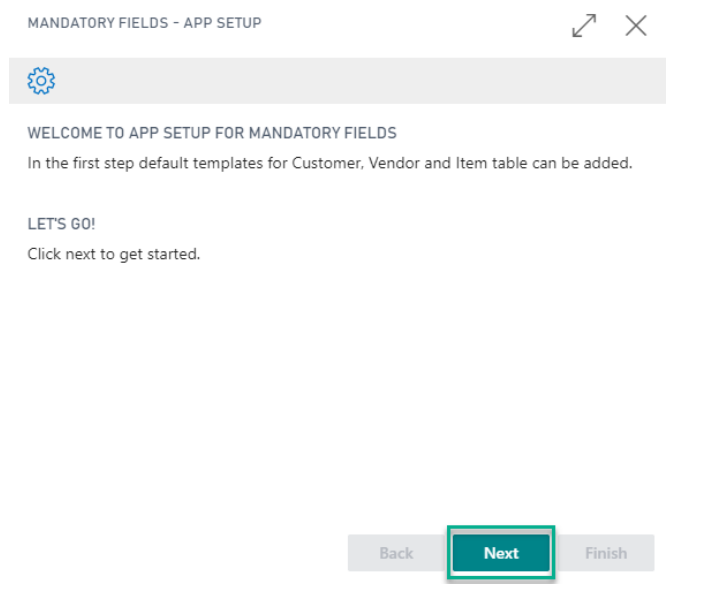Page can also be accessed from the Business Manager Role Center, under the menu "Setup & Extensions"
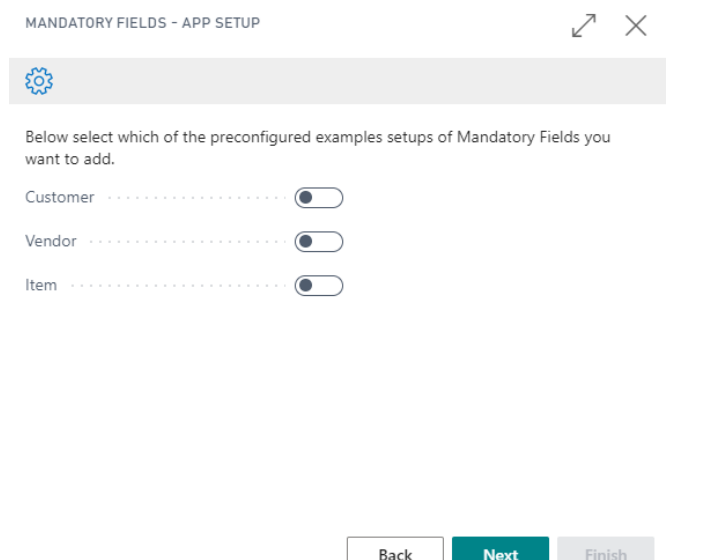

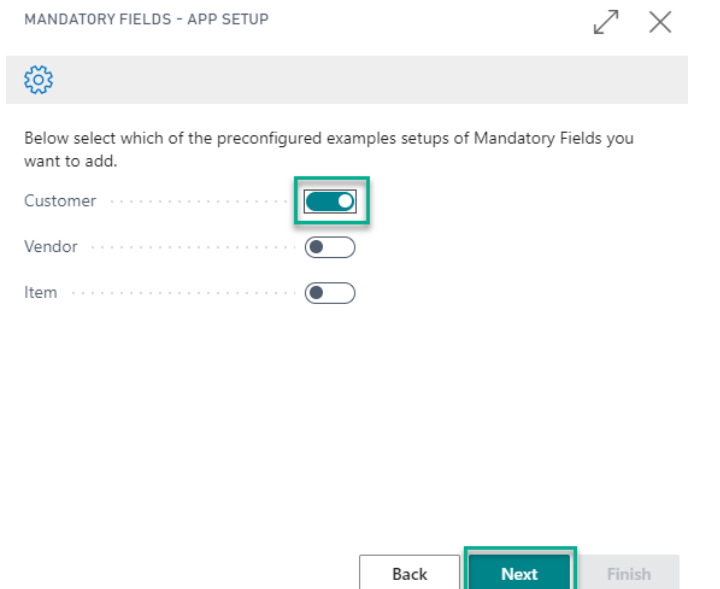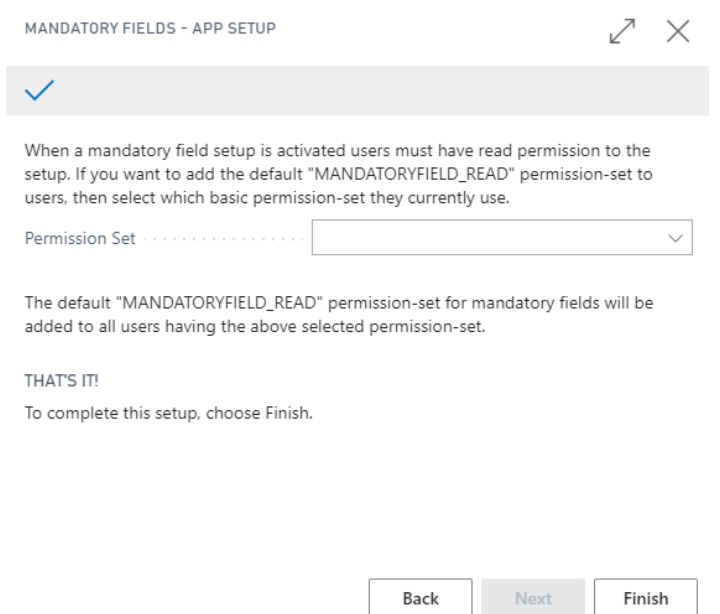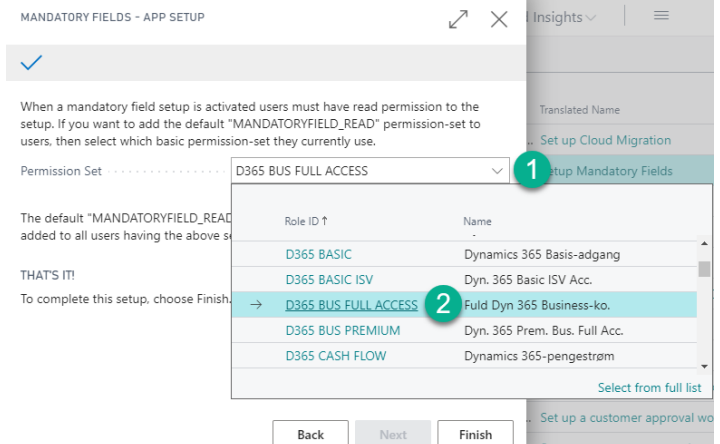From the Assisted Setup list, locate the line that reads "Setup Mandatory Fields".

Click on the text "Setup Mandatory Fields", or use the action "Start Setup" in the ribbon. This will start the Assisted Setup Wizard for Mandatory Fields.

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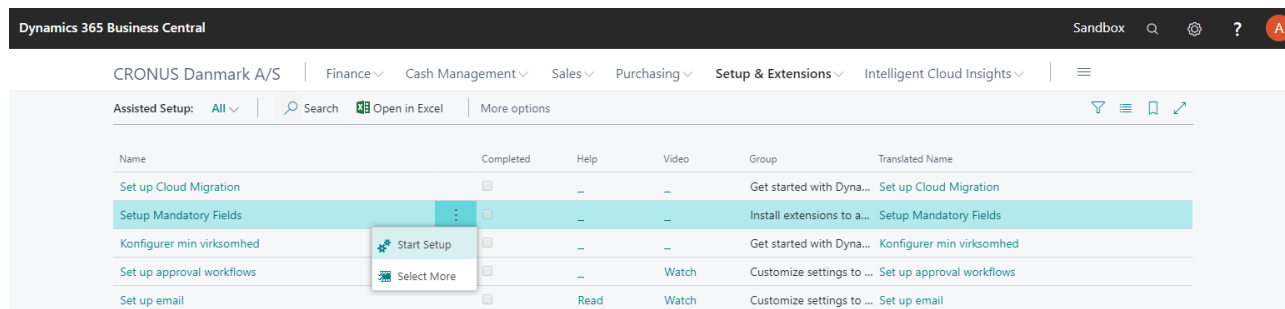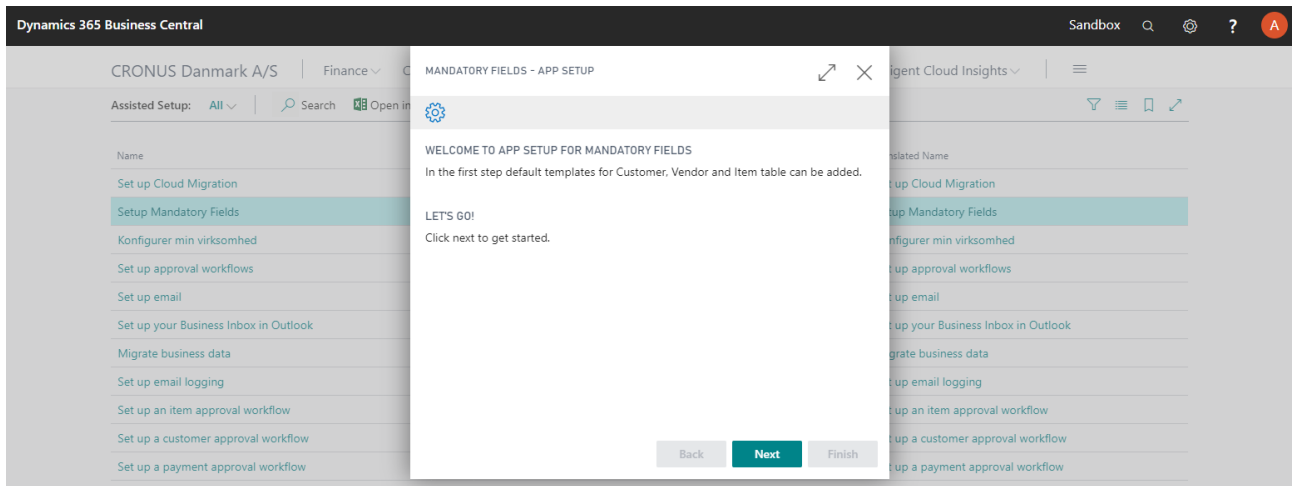
The purpose of the Wizard is to help you setup some pre-configured examples of the mandatory field setup. It also help to ensure that every user has the required permissions to use the extension.

Click Next to start the setup	MANDATORY FIELDS – APP SETUP ⚙ WELCOME TO APP SETUP FOR MANDATORY FIELDS In the first step default templates for Customer, Vendor and Item table can be added. LET'S GO! Click next to get started. Back **Next** Finish
In this step, you can choose to activate example setups of mandatory fields. Select one or more by setting a check mark besides each.	MANDATORY FIELDS – APP SETUP ⚙ Below select which of the preconfigured examples setups of Mandatory Fields you want to add. Customer ⬤ Vendor ⬤ Item ⬤ Back **Next** Finish

|	
In this guide, we select Customer. Click Next.	MANDATORY FIELDS – APP SETUP ⚙ Below select which of the preconfigured examples setups of Mandatory Fields you want to add. Customer · · · · · · · · · · · ◉ Vendor · · · · · · · · · · · · ◯ Item · · · · · · · · · · · · · · ◯ Back　**Next**　Finish
When a mandatory field setup is activated, all users must have permission to read the setup. In this step of the wizard we select a permission set that all users currently have. The setup will then assign, all users having the selected permission set, the proper permissions to read mandatory field setup.	MANDATORY FIELDS – APP SETUP ✓ When a mandatory field setup is activated users must have read permission to the setup. If you want to add the default "MANDATORYFIELD_READ" permission-set to users, then select which basic permission-set they currently use. Permission Set · · · · · · · · · [　　　　　　　▽] The default "MANDATORYFIELD_READ" permission-set for mandatory fields will be added to all users having the above selected permission-set. THAT'S IT! To complete this setup, choose Finish. Back　Next　Finish
In this guide, we select "D365 BUS FULL ACCESS"	MANDATORY FIELDS – APP SETUP ✓ When a mandatory field setup is activated users must have read permission to the setup. If you want to add the default "MANDATORYFIELD_READ" permission-set to users, then select which basic permission-set they currently use. Permission Set · · · · · · · · · [D365 BUS FULL ACCESS　▽] ① The default "MANDATORYFIELD_READ added to all users having the above s THAT'S IT! To complete this setup, choose Finish. Role ID ↑　　　　　Name D365 BASIC　　　Dynamics 365 Basis-adgang D365 BASIC ISV　Dyn. 365 Basic ISV Acc. → D365 BUS FULL ACCESS ② Fuld Dyn 365 Business-ko. D365 BUS PREMIUM　Dyn. 365 Prem. Bus. Full Acc. D365 CASH FLOW　Dynamics 365-pengestrøm 　　　　　Select from full list Back　Next　Finish

Click Finish to complete the setup	**MANDATORY FIELDS – APP SETUP** ⤢ ✕ ✓ When a mandatory field setup is activated users must have read permission to the setup. If you want to add the default "MANDATORYFIELD_READ" permission-set to users, then select which basic permission-set they currently use. Permission Set · · · · · · · · · · · · · · · D365 BUS FULL ACCESS ⌄ The default "MANDATORYFIELD_READ" permission-set for mandatory fields will be added to all users having the above selected permission-set. THAT'S IT! To complete this setup, choose Finish. Back Next Finish

Back on the Assisted Setup page the "Setup of Mandatory Fields" will be set to status Completed.

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Assisted Setup: All ⌄ | 🔍 Search ▣ Open in Excel | More options   ▽ ≣ ▢ ⤢

Name	Completed	Help	Video	Group	Translated Name
Set up Cloud Migration	☐	_	_	Get started with Dyna...	Set up Cloud Migration
Setup Mandatory Fields	☑	_	_	Install extensions to a...	Setup Mandatory Fields
Konfigurer min virksomhed	☐	_	_	Get started with Dyna...	Konfigurer min virksomhed
Set up approval workflows	☐	_	Watch	Customize settings to ...	Set up approval workflows
Set up email	☐	Read	Watch	Customize settings to ...	Set up email
Set up your Business Inbox in Outlook	☐	Read	Watch	Customize settings to ...	Set up your Business Inbox in Outlook
Migrate business data	☐	Read	Watch	Get started with Dyna...	Migrate business data

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How to setup - Manual Setup

Manual setup, or just setup of new mandatory fields, can be done using the Mandatory Fields Setup. Access this page by using search.
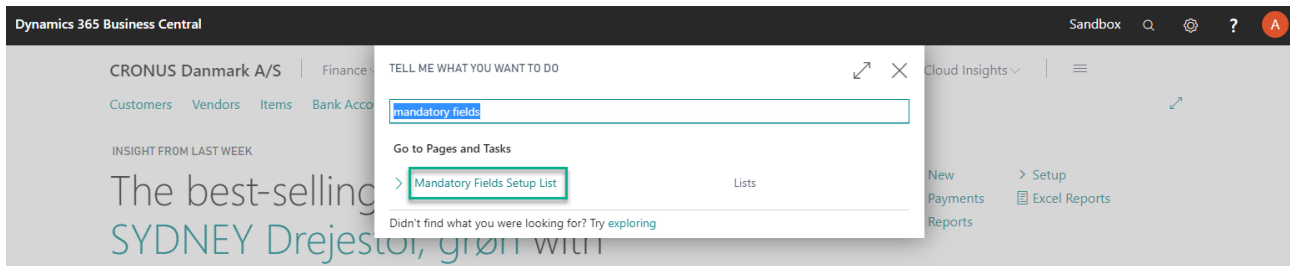
The Mandatory Fields Setup List allows you to either view/edit existing field setups, or create a new setup.
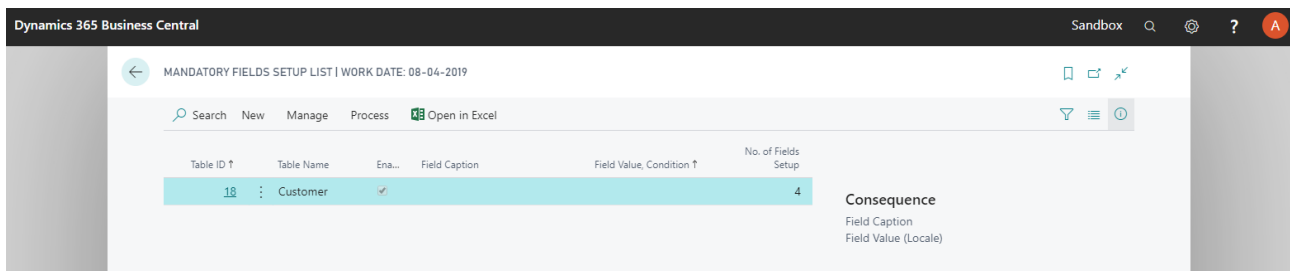
Select the action "New" and then "Assisted Setup…" in the ribbon, which will open a Wizard that guides you through the setup process.

Click Next to start the setup	
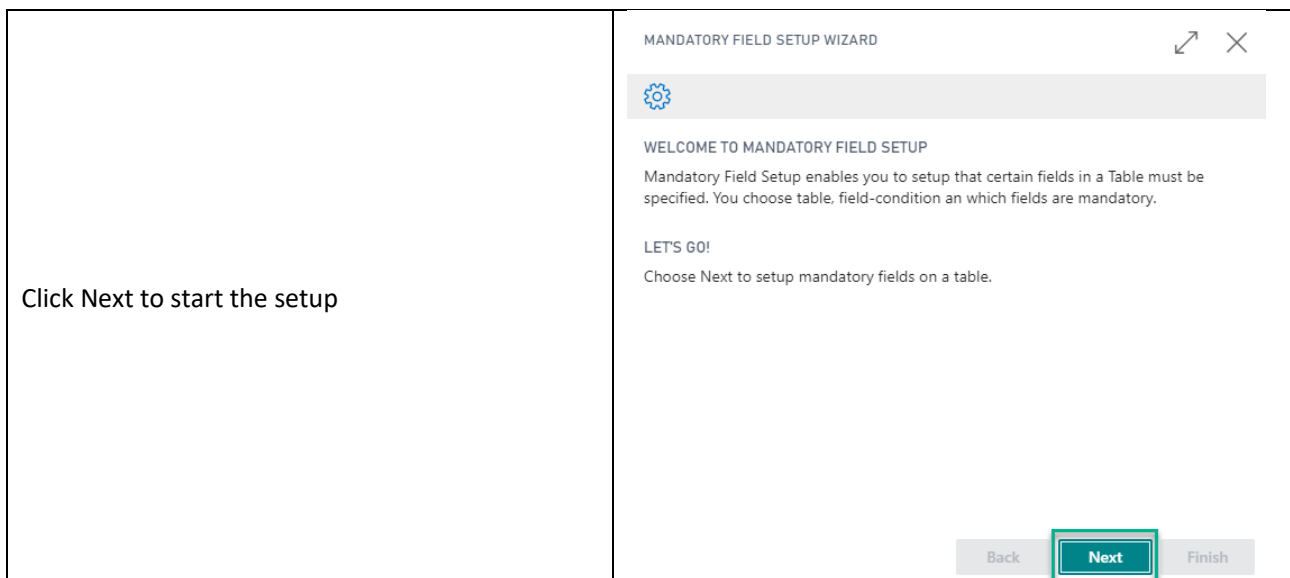
In this step, you choose on which table you want to setup mandatory fields. Select if the setup should be enabled. Optionally, you can select if a certain field and value should moderate if the fields are mandatory.	MANDATORY FIELD SETUP WIZARD ⟋ ✕ ⚙ Start by selecting table, and optional a field with conditional value. In next step you will be able to specify which fields are mandatory. Table ID · · · · · · · · · · · · · · · · ▢ **1** ⌄ Table Name · · · · · · · · · ▢ Enabled · · · · · · · · · · · · ◯— **2** Field ID · · · · · · · · · · · · · · ▢ **3** ··· Field Caption · · · · · · · · · · ▢ Field Value, Condition · · · · · · · · · ▢ Back **Next** Finish
In this guide, we select the Vendor table. We also select that the setup should only apply if "Country/Region Code" is "DE" We also enables the setup. Click Next.	MANDATORY FIELD SETUP WIZARD ⟋ ✕ ⚙ Start by selecting table, and optional a field with conditional value. In next step you will be able to specify which fields are mandatory. Table ID · · · · · · · · · · · · · · · · 23 ⌄ Table Name · · · · · · · · · · · · Vendor Enabled · · · · · · · · · · · · —◯ Field ID · · · · · · · · · · · · · · 35 ··· Field Caption · · · · · · · · · · Country/Region Code Field Value, Condition · · · · · · · · · DE Back **Next** Finish
In this step, we specify which fields are mandatory. Optionally you can select if each fields should have a specific value or should not have a certain value.	MANDATORY FIELD SETUP WIZARD ⟋ ✕ ✓ Below you can select which fields that are mandatory, and optionally which value each field should have. Fields Setup ⌄ | Required Field ID ↑	Required Field Caption	Equal To (Optional)
→ *			 Back **Next** Finish

In this guide, we select the field "Language Code" and sets the "Equal To" to value "ENU"

By this, we setup that if Vendor is German, the Language Code must be "ENU". Then English translations will be used on reports.

MANDATORY FIELD SETUP WIZARD

Below you can select which fields that are mandatory, and optionally which value each field should have.

Fields Setup ⌄

Required Field ID ↑	Required Field Caption	Equal To (Optional)
→ 24	Language Code	ENU

Back | **Next** | Finish

Click Finish to complete the setup

MANDATORY FIELD SETUP WIZARD

THAT'S IT!
To complete this setup, choose Finish.

Back | Next | **Finish**

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How to uninstall

Uninstall Mandatory Fields from the Extension Management Page. Access this page by using search.
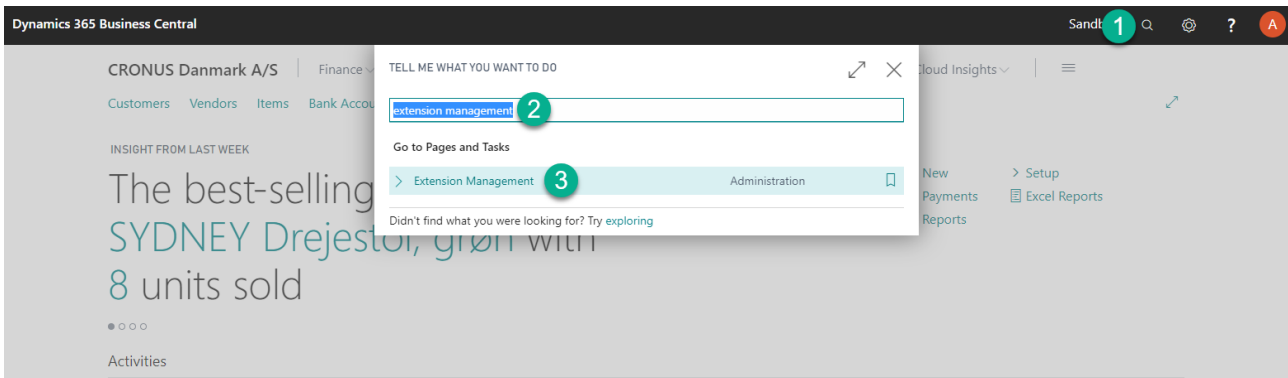
Page can also be accessed from the Business Manager Role Center, under the menu "Setup & Extensions"
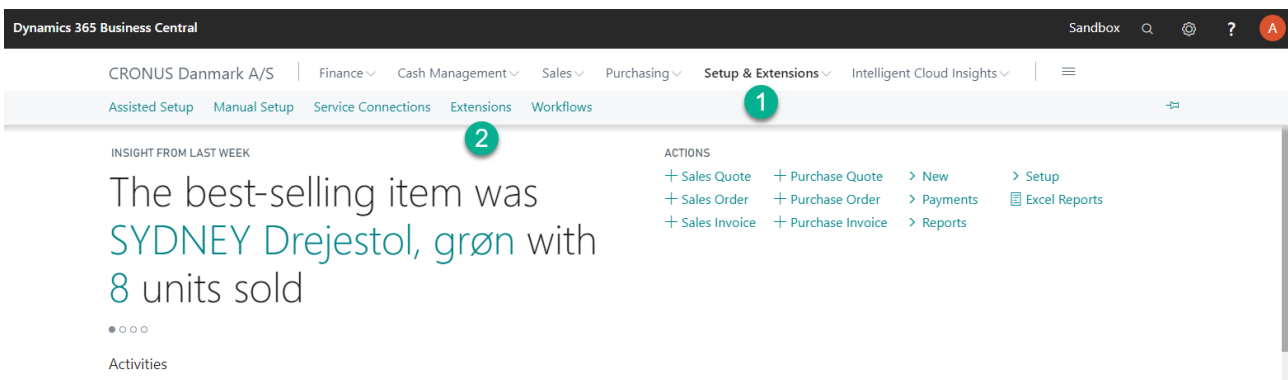
Locate and select the line that reads "Mandatory Fields".

Select the action "Manage" and then "Uninstall" from the ribbon to remove the extension.
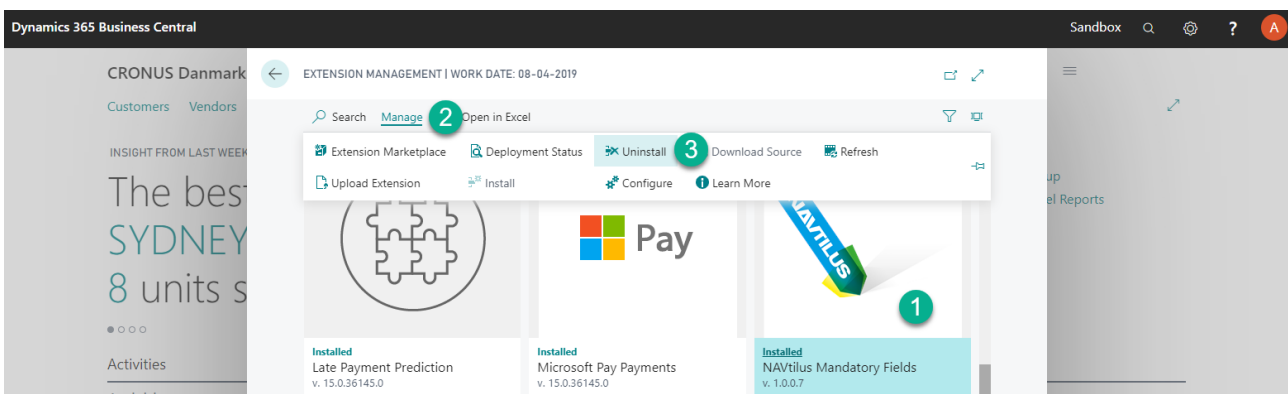
After successful un-installation users must logout and login again, to remove the extension.

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Usage example 1: Customer

We open the Mandatory Field Setup. Access this page by using search.
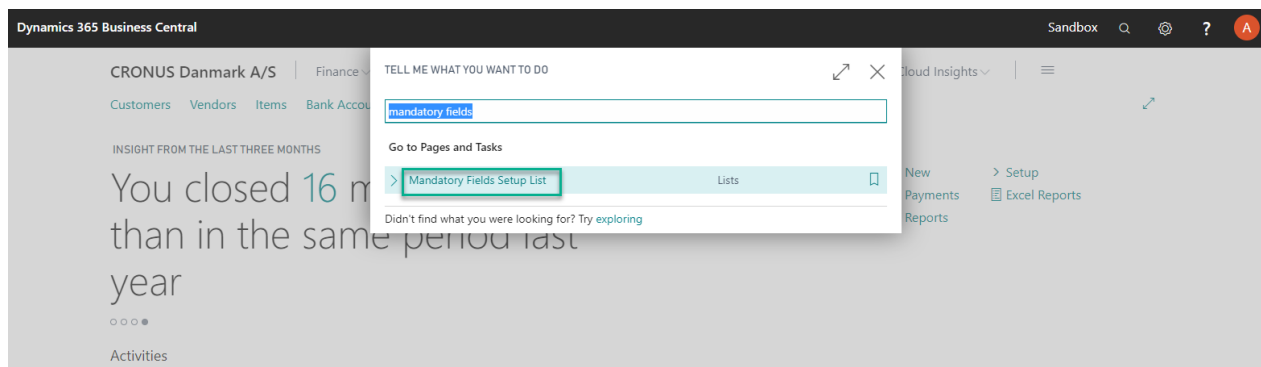
Consider the following example of mandatory field setup.
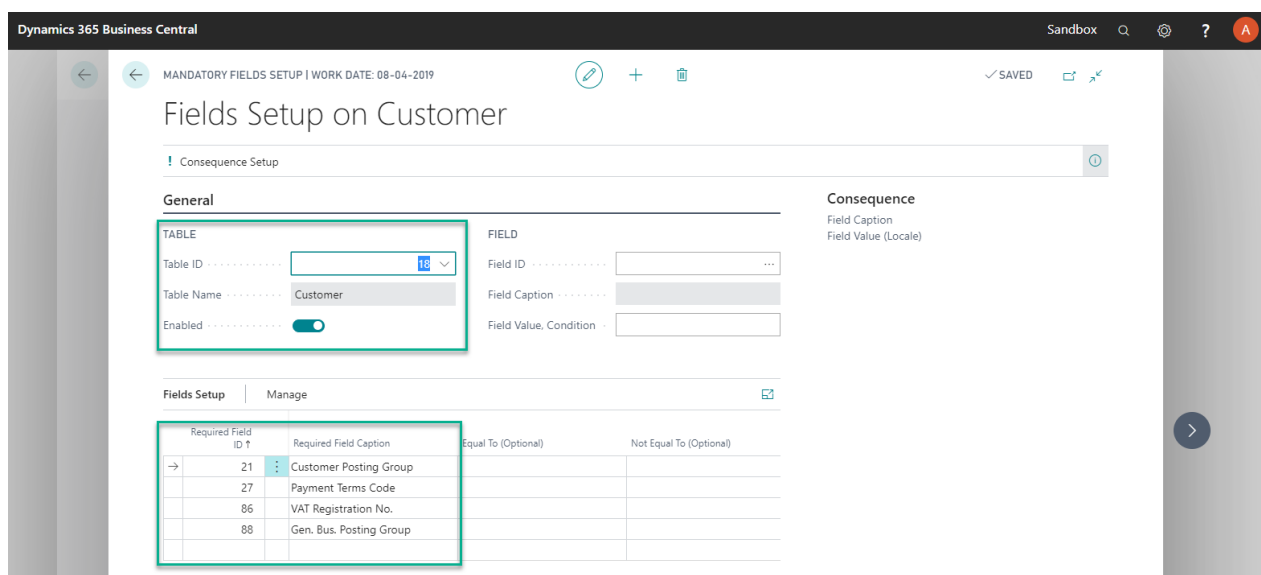
The setup is on the Customer table, and requires that the following fields must be specified

- Customer Posting Group
- Gen. Bus. Posting Group

- Payment Terms Code
- VAT Registration No.

We open the Customer list page. Access this page from the Business Manager Role Center.

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We select the first Customer on the list, and then the action "Edit" from the ribbon.

The Customer Card is shown

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We do any kind of update on the Customer. In this example, we update the field "Home Page" on the "Address & Contact" tab.

We close the page to save the changes.

Right away, we get a warning that the customer is not properly setup in accordance with the mandatory field setup for the Customer table.

Click Ok to close the message.

If we inspect the Customer, we can see that 3 out of the mandatory 4 fields are filled.

If you specify the missing fields, in this case "VAT Registration No.", then the validation against mandatory fields are successful.

Usage example 2: Vendor with a Consequence Setup

We open the Mandatory Field Setup. Access this page by using search.
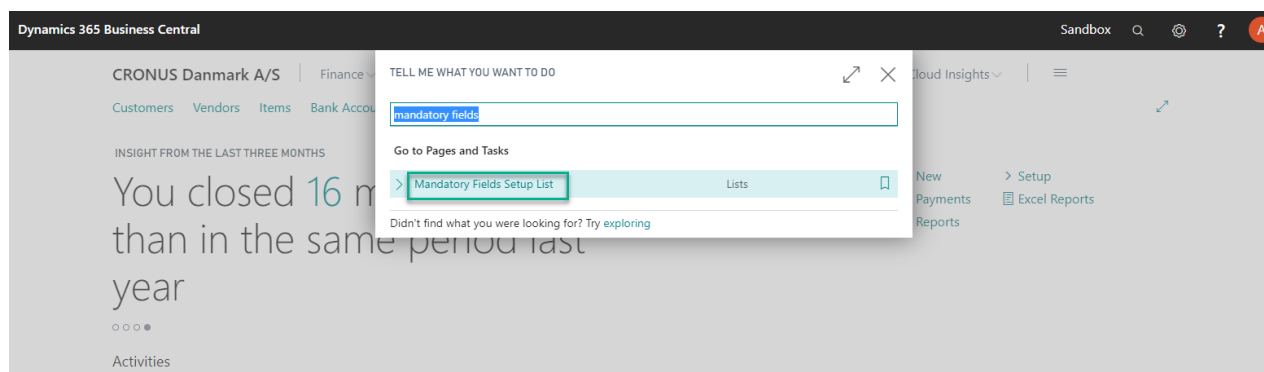
From the Mandatory Fields Setup List we open the setup on Vendor.
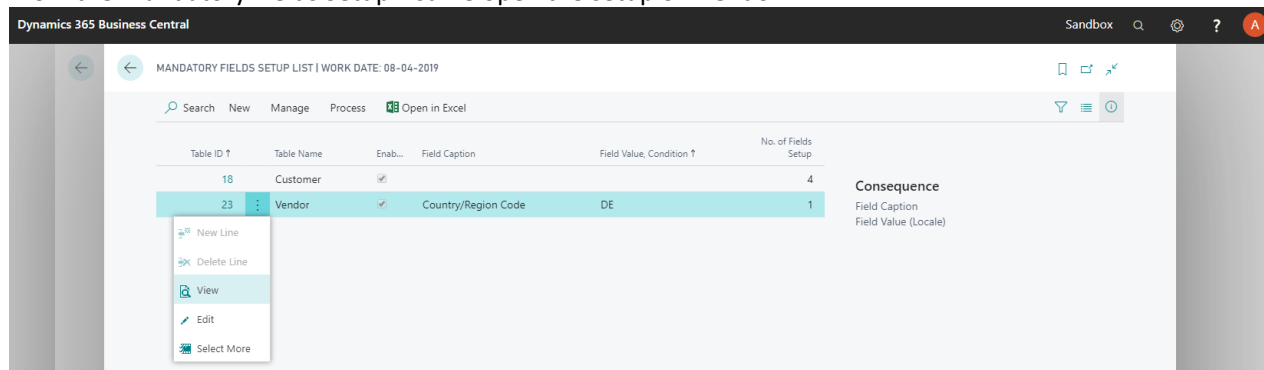
Consider the following example of mandatory field setup.
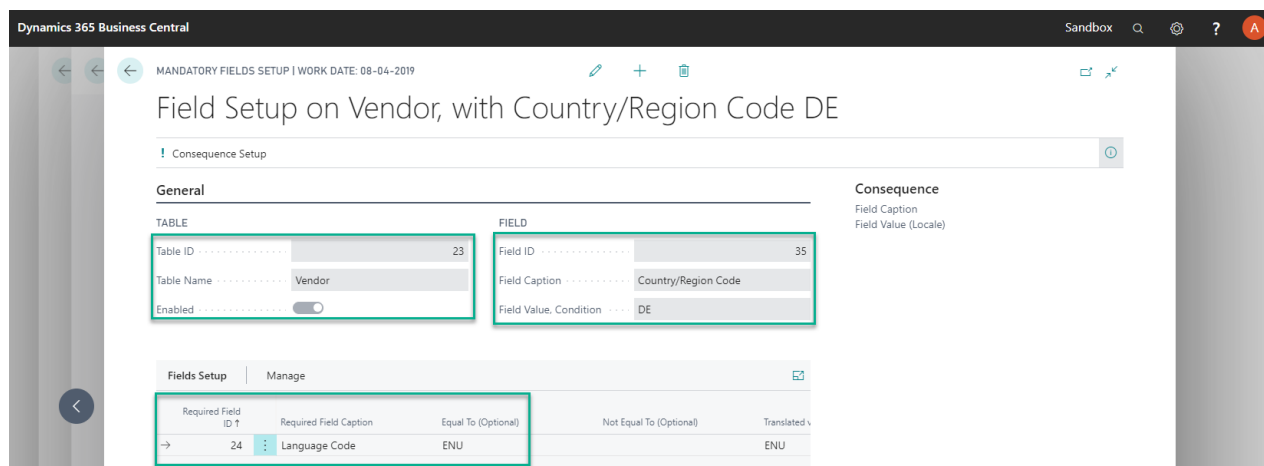
The setup is on the Vendor table, and is active if;
- "Country/Region Code" have the value "DE"

Then the following field are mandatory;
- "Language", musts be equal to "ENU"

Additionally, we want to configure a Consequence if the mandatory field validation is not successful (when it is added it will show up in the FactBox).

Select the action "Consequence Setup" from the ribbon - to view, edit or create.

If the Consequence Setup is empty, we select the action "+" from the ribbon to create a new entry.

In the Table Section the field "Table ID" is automatically filled.

In "Field ID", we select the field "Blocked"

In "Field Value", a valid input for the selected field must be provided. When using the option-field "Blocked" on Vendor it allows either; "","Payment" or "All" (without quotes).

In this case, we type "all" in the "Field Value" (without quotes), and hit the ENTER key, or click on another field to change focus.

Right away, the value is translated and saved as a value that is independent of user's current language setting. If we inspect the setup, the following is saved:

Close the setup and return to the Role Center.

We open the Vendor list page. Access this page from the Business Manager Role Center.

We create a Vendor from the list, by selecting the action "New" from the ribbon.

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Vendors: All ⌄ | 🔍 Search + New 🗑 Delete Process ⌄ New Document ⌄ Vendor ⌄ Navigate ⌄ 📊 Open in Excel

10000		
Fredborg Lamper A/S	13.568,75	⋮
Krystal York	13.568,75	

20000		
Elvstrøm Træindustri A/S	32.131,25	⋮
Evan McIntosh	32.131,25	

30000		
Schmeichel Møbler A/S	45.736,25	⋮
Bryce Jasso	45.736,25	

40000		
Wide World Importers	95.353,00	⋮
Toby Rhode	95.353,00	

50000		
Fabrikam, Inc.	90.531,00	⋮
Raymond Hillard	90.531,00	

In this, we choose not to use a template, and simply select the first line and then clicks OK in the Template list.

🔍 Search   📊 Open in Excel | More options

SELECT A TEMPLATE FOR A NEW VENDOR

	Description	
→	Tomt kreditorkort	⋮
	Kontantbetalingskreditor (kontant, moms)	
	Privat kreditor (giro, ingen moms)	
	Business-to-business-kreditor (bank, moms)	
	EU-kreditor (EUR, bank)	

OK   Cancel

On the newly created Vendor we do the following

1) Enter a company name in the field "Name"
2) Select DE for Germany in the field "Country/Region Code"
3) Click "Show More" on the "Address & Contact" tab
4) Leave the field "Language Code" empty

We close the page to save the changes.

Right away, we get a warning that the vendor is not properly setup in accordance with the mandatory field setup for the Vendor table. The message also reads that Vendor, are automatically set to "All" in the field "Blocked".

Note: If vendor is already "All" in the field "Blocked", then the message is slightly different.

Click Ok to close the message.

If vendor card is reopened the Below the result is shown.

If you specify the missing field, in this case "Language Code" to value "ENU", then the validation against mandatory fields are successful.

Click Ok to close the message.

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Additional information

The following is just additional documentation on the setup that is included with the App. Editing this setup is not expected.

Permission Set

There are two permission sets included with the extension.

- MANDATORYFIELD_READ
- MANDATORYFIELD_SETUP

All users should be assigned the "MANDATORYFIELD_READ" permission set directly or through a User Group.

All users who are allowed to update mandatory field setup should be assigned the "MANDATORYFIELD_SETUP" permission set.
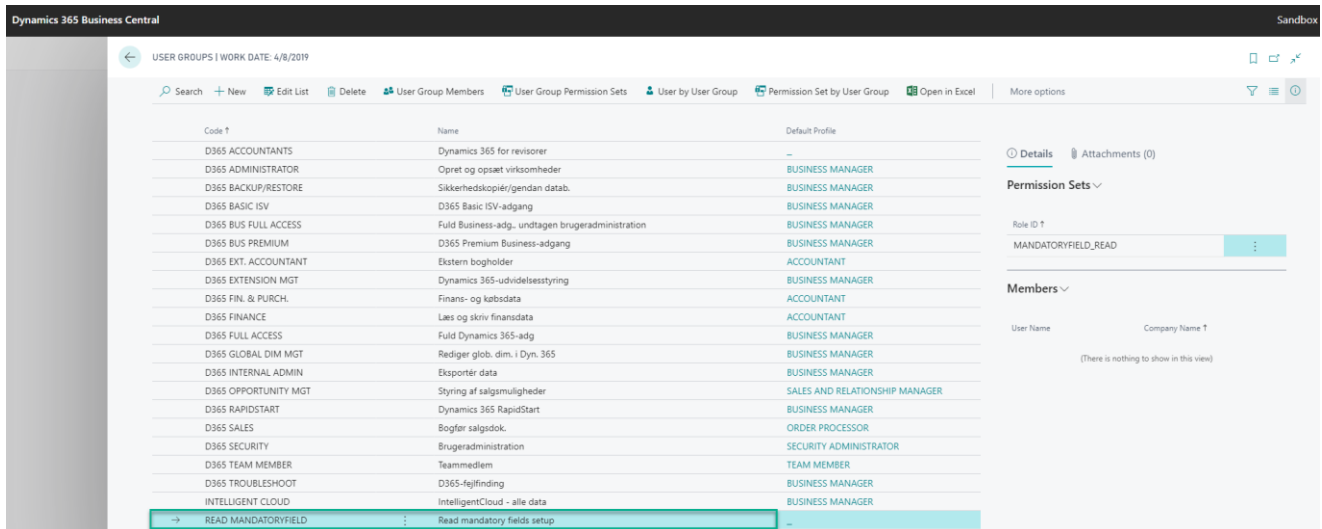
Any user who is allowed to run the Assisted Setup Wizard requires the "MANDATORYFIELD_SETUP" permission set.

Any user who has either the "SUPER" or "SUPER (DATA)" permission set, already has access to all tables and setup of Mandatory Fields.

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User Group

There are one User Group included with the extension.

- MANDATORYFIELD_READ

The User Group can be used to assign users the "MANDATORYFIELD_READ" permission set. (Described in the section "Permission Set")