

CUSTOM FIELDS

V1.14.0.0

IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

USER SCENARIO DOCUMENTATION



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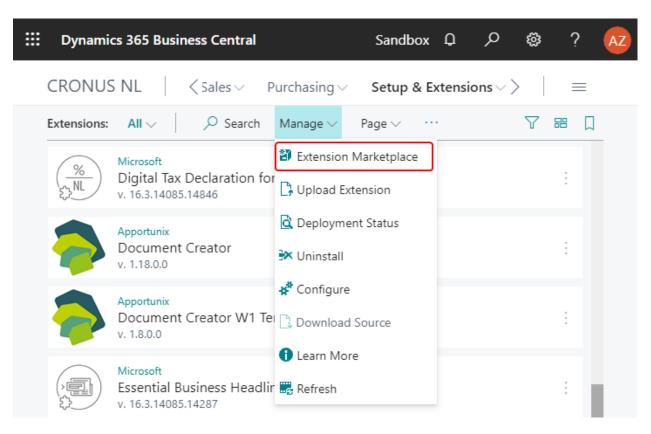
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Installation

The Custom Fields extension can be installed from the Extension Marketplace (AppSource).

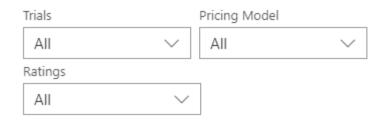
- 1. In Microsoft Dynamics 365 Business Central, go to Setup & Extensions > Extensions
- 2. Open the Extension Marketplace (AppSource) via: Manage > Extension Marketplace





3. Search for and select "Custom Fields" (By Apportunix)





App results (3)





- 4. Please take note of the End-User License Agreement and Privacy Statement
- 5. Choose **GET IT NOW**, enter your details, and follow the further steps in the **Extension Installation** page that will open in Microsoft Dynamics 365 Business Central.

Apps > Custom Fields



Custom Fields 🛇 save for later Apportunix

Overview

Reviews

GET IT NOW

Pricing Free

Products Dynamics 365 Business Central

Publisher Apportunix

Acquire Using Work or school account

Version 1.14.0.0

Categories Analytics Marketing Operations & Supply Chain

Industries Distribution Manufacturing & Resources

Support Support

Easily create your own custom fields for customers, vendors, contacts and more

Do you have customer data you can't register? Are you missing important contact or vendor information which is essential for your company business? And is there any sync between contacts, customers and vendors? Just some important issues Small to Midsize Businesses struggle with nowadays.

At the moment a lot of standard fields for entities like contacts, customers and vendors are provided, but what if you want to register company specific data for your company process in Microsoft Dynamics 365 Business Central? We have the perfect app to help you get more productive. Using the Custom Fields extension you can easily create your own specific fields for customers, vendors, contacts and other entities. Each field can be set up with a field type for data entry, you can use customizable lists and can translate each custom field into your own language. The extension Custom Fields also supports synchronization of the custom fields between contacts, customers and vendors. This will enable you to maintain your data in one place and keep it in sync with the related data. A time-saving and error-limiting functionality!



Permissions Configuration

After Custom Fields extension installed the permission set CUSTOM FIELDS was added to the system.

\leftarrow	PERMISSION SETS WORK DATE: 1-10-201	9						e
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	\rightarrow CUSTOM FIELDS	Custom Fields	Extension	Custom Fields	System Permiss	ions∨		
	DOCUMENT CREATOR	Document Creator	Extension	Document Creator	Object Type			
	ESSENTIALBUSINESSHEA	Essential Business Headlines	Extension	Essential Business Headlines	1	Object ID ↑	Object Name	
	INTELLIGENTCLOUDBASE	Intelligent Cloud Base	Extension	Intelligent Cloud Base	(There is not	thing to show in t	this view)	
	INTELLIGENTCLOUDBC	Intelligent Cloud Business Cen	Extension	Business Central Intelligent Cloud	(There is not	uning to show in t	ans view)	
	LATE PAYMENT PREDICT	Late payment prediction	Extension	Late Payment Prediction				
	MSWALLETSTANDARD	MSWallet Permissions	Extension	Microsoft Pay Payments	Tenant Permiss	ions \vee		
	PAYPALSTANDARD	PayPalStandard Permissions	Extension	PayPal Payments Standard	Object Type			
	PAYPALSTANDARDREAD	PayPalStandard Read Permission	Extension	PayPal Payments Standard	1	Object ID ↑	Object Name	
	SALESANDINVENTORYFOR	Sales And Inventory Forecast	Extension	Sales and Inventory Forecast				
	WORLDPAYSTANDARD	WorldPayStandard Permissions	Extension	WorldPay Payments Standard	Codeunit	70256951	WSB Cust. Fi	
	D365 ACC, PAYABLE	Dynamics 365 crediteuren	System		Codeunit	70256952	WSB Cust. FI	
	D365 ACC. RECEIVABLE	Dyn. 365 debiteuren	System		Page	70256950	Custom Field	
	D365 ACCOUNTANTS	Dynamics 365 voor accountants	System		Page	70256951	WSB Custor	
	D365 ADCS, EDIT	Dynamics 365 ADCS maken	System		Page	70256952	Custom Field	
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	D365 ASSEMBLY, VIEW	Dynamics 365 assemblage weerg.	System					
	D365 BACKUP/RESTORE	Backup of herstel van database	System					
	D365 BANKING	Dynamics 365 bankieren	System					
	D365 BASIC	Dynamics 365 basistoegang	System					
	D365 BASIC ISV	Dyn. 365 Basic ISV Acc.	System					
	D365 BUS FULL ACCESS	Dyn. 365 voll. bedr.toegang	System					

This permission set should be assigned to relevant users or user groups.

To assign the CUSTOM FIELDS permission set to users:

- 1. Choose the Lightbulb icon on the top right corner of the Microsoft Dynamics 365 Business Central to open search, enter **Users**, and then choose the related link.
- 2. Select the user that you want to assign permission to. Any permission sets that are already assigned to the user are displayed in the **Permission Sets** FactBox.
- 3. Choose the **Edit** action to open the **User Card** page.
- 4. On the User Permission Sets FastTab, on a new line, fill in the Permission Set field with CUSTOM FIELDS.



Conge Web Service Key Effective Permissions More options Office 365 Authentication > User Groups Manage Code 1 Notes Notes Code 1 Namage </th <th>Stefan Klo</th> <th>р</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	Stefan Klo	р								
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For more information, please refer to Microsoft Dynamics 365 Business Central documentation - <u>Managing Users</u> and <u>Permissions</u>



Setup and Usage

Search for Custom Fields Definition page to start custom fields configuration:

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	Activities ~		Setting Up Suggested Field Values To avoid manual calculations and complete tasks quickly and accurately, you can set up a	
	SALES THIS MONTH	OVERDUE SALES INVOICE	Get from Microsoft AppSource Show all (72)	
	€1.006	€115.698	Custom Fields Easily create your own custom fields for customers, vendors and contacts	
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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.



	GENERAL Entity Filter				Contact									۲
	Manage 📓 Custom	Field Values 🕞 Translations	More options										٢	7
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\rightarrow		Code		Relation	2	3								
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The user can add captions for other relevant languages in Custom Fields Translations page which is accessible from Actions:

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\rightarrow		: Code		Relation	2	3								
	Contact	Code Text		Department Skype account	2	4								
	Contact	Date		Birthday	1									

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



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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:

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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:

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Custom fields on Contacts List page

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		~				No. of Job Responsibilities	0	
	Department SALES	~				No. of Industry 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.

← co	DNTACT CARD WORK DATE: 1-10-2	019		Ø +	i i		~	SAVED 🗖 🔎
(CT000007 · A	lpine Ski I	House					
Pr	ocess Report More opt	tions						0
Fo	oreign Trade >						Details Attachments	(0)
							Contact Picture \lor	
	Profile Questionnaire Man	nage				63		
	Question		Answer		Questions Answered (%) Last Da	ste Updated	$\left(\right)$	
			(There is nothing	to show in this view))
								/
							Contact Statistics	
		Value 1	Description				GENERAL	172 84
		→ <u>CUST</u>	Customer				Cost (LCY) Duration (Min.)	672.00 84
		EMP	Employee				OPPORTUNITIES	
0	ustom Fields	VEND	Vendor				No. of Opportunities	3
-	ustom metus	+ New		Select from full list			Estimated Value (LCY) Calcd. Current Value (LCY)	10.450.00 200.00
Re	lation	CUST	~	Birthday	20-3-1988		SEGMENTATION	
De	epartment	SALES	~				No. of Job Responsibilities	0
Sk	ype account						No. of Industry Groups No. of Business Relations	0
20	ype decount						No. of Mailing Groups	0

Scenario 2: Synchronization of custom fields between contacts and customers

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:



	GENERAL								Copy to C	ontact				
	Entity Filter				Customer				field is cop	a value of thi ied to the link	ked contact			•
	Manage	ield Values 🕃 Translations	Actions F	ewer options					customers	n be defined or vendors. F1 to learn m			7	7
	Entity 1	Туре †	Field No. ↑	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Cogy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
÷	Customer	Code	1	Relation	2	3			۲					
	Customer	Code		Customer Type	2	3								
	Customer	Text Boolean		Website Establishment within EU	2	-								
						-						0		

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

C1000007 · Alpi	ne Ski House					
Process Report More options						0
Foreign Trade >				() D	etails 🔋 Attachments (0)	
				Con	tact Picture \sim	
Profile Questionnaire Manage						
Question	Answer		Questions Answered (%) Las	t Date Updated	(\bigcirc)	
	(There is nothin	g to show in this view)			$\left(\begin{array}{c} \\ \end{array}\right)$	
				Con	tact Statistics	
				GENE		
				Cost Durat	(LCY) tion (Min.)	672.00 84
				59400 A24	ORTUNITIES	
Custom Fields					of Opportunities nated Value (LCY)	3 10.450,00
Relation		Birthday	20-3-1988	Calco	I. Current Value (LCY)	200.00
Department SALE				SEGN	MENTATION of Job Responsibilities	0
	3				if Industry Groups	0



40000 · Alpine Ski House	
New Document Request Approval Navigate Customer More options	0
Statistics >	Details Attachments (0)
	Customer Picture \sim
Special Prices & Discounts Manage	
Unit of Measure Minimum Starting Date Line Type 1 Sales Type 1 Type 1 Code 1 Code 1 Quantity 1 Line Discount % Unit Price 1 Ending	ng Date
(There is nothing to show in this view)	
	Sell-to Customer Sales History
	1 0 1
	Ongoing Sales Quotes Blanket Orders Orders
Custom Fields	1 0 0
	Ongoing Sales Invoices Return Orders Credit Memos
Relation CUST V Customer Type V	28 28 0
Customer type	Posted Sales Posted Sales Posted Sales Shipments Invoices Return Receipts

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

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

	CUSTOM FIELDS DEFINITIO	WSB CUSTOM FIELDS TRANSLATIONS	WORK DATE: 1-10-2019	🗸 SAVED 🗖 🏹				/ SAVED		× ⁴
Custor	GENERAL	🔎 Search 🕂 New 🐺 Edit List	🗎 Delete Page	7 ≣						
HEADL	Entity Filter	Language Code ↑	Caption							Ŧ
\bigvee	Manage 🗐 Custom Fiel	→ NLD	✓ Verjaardag							V
Bu		ENU	Birthday		spy to		Copy to S.	Conv to P	Copy to P.	
	Entity 1				ontact	Header	Line	Header	Line	Job
	Contact									
Activit	Contact Contact									
Activi										
Activi										
€1 >see ONGOM SALE 2					l					
ІЛСОМІ					- 11					

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



III Dynamics 365 Bu	usiness Central	////				23(11)		Sandbox-v15	P @ ?	
	CRONUS NL Finance V	Cash Management	p EDIT - MY SETTINGS		2 =	E				
	Customers Vendors Items HEADLINE Want to lear Business Ce Activities	Bank Accounts Chart of Account	Role	1-10-2019 Dutch (Netherlands) Dutch (Netherlands) Change when I receive notificati	Luote 	 > New > Payments > Reports 	> Setup	2		
	Activities∨ sales this Month €1.006 > See more	overdue sales invoice €115.698 >see more	t 34.301	OK ↓ >See more	Cancel					
	ONCOING SALES SALES OUDTES SALES OUDTES SALES ORDERS		ONGOING PUR F	APPROVALS PURCH INVOL HEAT WEEK 13 >	PAYMENTS UNPROCESS PAYMENTS 1 >	eD AVERAGE C DAYS	ol- invoices 13			

3. 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:

€ €	CONTACTKAART WERKDATUM: 1-10-2019		OPGESLAGEN 🖬 🧩
	CT000007 · Alpine Ski House		
	Proces Rapport Acties Navigeren Rapport Minder opties		0
	Buitenlandse handel >	🕐 Details 👔 Bijlagen	n (0)
		Contactafbeelding	·
	Profielvragenlijst Beheren		
	Vræg Antwoord	Beantwoorde vragen (%) Laatst bijgewerkt op	
	(Er valt niets te tonen in deze we	ergave)	
<			
			0
		Contactstatistiek	
		Contactstatistiek	0
			672.00
		ALGEMEEN Kosten (LV)	
	Vrije velden	ALGEMEEN Kosten (LV) Duur (Min) ØPPORTUNITIES Aantai opportunities	
		ALGEMEEN Kosten (LV) Duur (Min.) OPPORTUNITIES Anntal opportunities Geschatte waarde (LV) Berekende huidige waarde	84 3 10.450.00
	Relatie Verjaard	ALGEMEEN Kosten (LV) Duur (Min.) OPPORTUNITIES Aantal opportunities Geschatte waarde (LV) Berekende huidige waarde SEGMENTATIE	84 10.45000 (LV) 200.00
		ALGEMEEN Kosten (LV) Duur (Min.) OPPORTUNTIES Aantal opportunities Geschatte waarde (LV) Berekende huidige waarde	84 3 10.450.00

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

their documents and jobs

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:

													AVED 7	·
	GENERAL Entity Filter Manage 👘 Custom Fi				MI					Copy to S. I Specifies if a field is copie quote/ordei memo/retur or contact is document.	i value of this ed to sales /invoice/crea n order when	lit 1 customer	 ۲	•
					NO. OF		СОРУ ТО	COPY TO	COPY TO	COPY TO S.	COPY TO	COPY TO P.	СОРУ ТО	COPY TO
	ENTITY	TYPE	FIELD NO.	FIELD NAME	TRANSLATIONS	NO. OF VALUES	CUSTO	VENDOR	CONTA	HEADER ~	S. LINE	HEADER	P. LINE	JOB
_	ENTITY Customer	TYPE Code		FIELD NAME Relation	TRANSLATIONS	NO. OF VALUES	CUSTO	VENDOR		HEADER ~	S. LINE	HEADER	P. LINE	
-			1		TRANSLATIONS 2 2	NO. OF VALUES			CONTA					JOB
ŀ	Customer	Code	1	Relation	TRANSLATIONS 2 2 2 2 2	6			CONTA					JOB
E	Customer Customer	Code Code	1 2 1	Relation Customer Type	2	6			CONTA					JOB

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.

Process Quote F	Request Approval	Print/Send Release Na	avigate More opt	tions							
Lines Manage	More options							62	Document	s Attached	
TYPE	N0.	DESCRIPTION	LOCATION	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	DISCOL	Documents	tomer Sales	11:4
Item	*	*			0				Sell-to Cus	tomer Sales	History
									5	0	0
Subtotal Excl. VAT (EUR))		0.00 Total	Excl. VAT (EUR)				0.00	Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
Inv. Discount Amount E				VAT (EUR)				0.00	0	0	0
Invoice Discount %			0 Total	Incl. VAT (EUR)				0.00	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
Invoice Details >							5/1/2019 RE	MBOURS	O Posted Sales Shipments	O Posted Sales Invoices	O Posted Sales Return Receipts
Shipping and Billi	ing >						Ste	fan Klop	0	invoices	Retorn Receipes
Foreign Trade >									Posted Sales Credit Memos		

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

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.

	GENERAL			Item									
		Field Values 📴 Translations		item								1	7
	Entity †	Type †	Field No. 1 Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	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	-								8
L													

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

	GENERAL														
	Entity Filter					Sales Line									•
	Manage 👘 Custom	Field Values	Translations	Actions Fe	ewer options										7
	Entity †	Тур	ie †	Field No. †	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
\rightarrow	Sales Line	: Tex	t	1	Transport Note	1	-								



- 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

						Item						field is con	a value of th	ne when item	
	Manage 👘 Custor	n Field Valu	es B R Translation	s Actions F	ewer options							Press Ctrl+	F1 to learn m	ore	
	Entity 7		Type 1	Field No. 1	Field Name	No. of Translations	No. of Values	Copy to Customer	Copy to Vendor	Copy to Contact	Copy to S. Header	Copy to S. Line	Copy to P. Header	Copy to P. Line	Copy to Job
\rightarrow	Item	1	Text	1	Transport Note	1	-					2			

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

ITEM CARD I WORK DATE: 1-10-2019	(<i>e</i>) + 🗈		√SAVED ⊑ , "
1896-S · ATHENE Tafel			
Process Item History Special Sales Pces & Discounts Rec			0
Blocked · · · · · · · · · · · · · · · · · ·	Item Category Code TAFEL	· Details	Attachments (0)
Inventory >		Picture ~	
Costs & Posting >	784,60 0	ET.HANDEL WEDERVERK	
Prices & Sales >		1.005.80	
Replenishment >		Purchase	1 1
Planning >		None Item Attri	butes
Item Tracking >		Attribute	Value
Warehouse >		Kleur Diepte	Zwart 60 LM
Curter Fills		Breedte	200 LM
Custom Fields		Hoogte Materiaalor	170 LM
Transport Note	Deliver face-up	Materiaalor	iscriniyving nout
Transport Note	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

Dynamics 365 Bu		°///		P]///		Ĭ	3///~~					be all of sandbox-vi		27	
€ € €											√ SAVED	⊐',×			
	101004 ·	Alp	pine Sk	i Hou											
	Process Release Posting Prepare Order Request Approval Print/Send Navigate More options												0		
	General> 13-5-2019 13-5-2019 13-6-2019											Details Attachments (0)			
												Sell-to Customer Sales History			
	Lines Manage More options											1 0 1			
	Туре		Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Department Code	Customergro Code	Transport Note			Ongoing Sales Ongoing Sales Ongoing Sales Blanket Orders Orders			
	Item		-	14-5-2019	13-5-2019	13-5-2019						1 0 0	- 1		
	\rightarrow Item	1	-	14-5-2019	13-5-2019	13-5-2019			Deliver face-up			Danning Stiller - Openning Stiller	- 1		
•												Ongoing Sales Ongoing Sales Return Orders Credit Memos	- 1	-	
												28 28 0	- 1	\diamond	
												Posted Sales Posted Sales Posted Sales Shipments Invoices Return Receipts	- 1		
											0				
	Subtotal Excl. VAT (EUR)									1.578,80	Posted Sales				
	Inv. Discount Amount	Inv. Discount Amount Excl. VAT · 0,00 Total VAT (EUR) · · · · 0,00								0,00	Credit Memos				
	Invoice Discount %	voice Discount % · · · · · · 0 Total Incl. VAT (EUR) · · · · · · 1.578.80								1.578.80	Customer Details ~				
												Customer No. 40	0000		
	Invoice Details > 11/(8D)										1M(8D)	Name Alpine Ski Ho			
												Phone No. Email ian.deberry@contoso.			
	Shipping and Billing > 11-9-2019										11-9-2019	Fax No.	com		
													0,00		
	Foreign Trade											Available Credit (LCY)	0,00		