



CUSTOM FIELDS

IN MICROSOFT DYNAMICS 365
BUSINESS CENTRAL

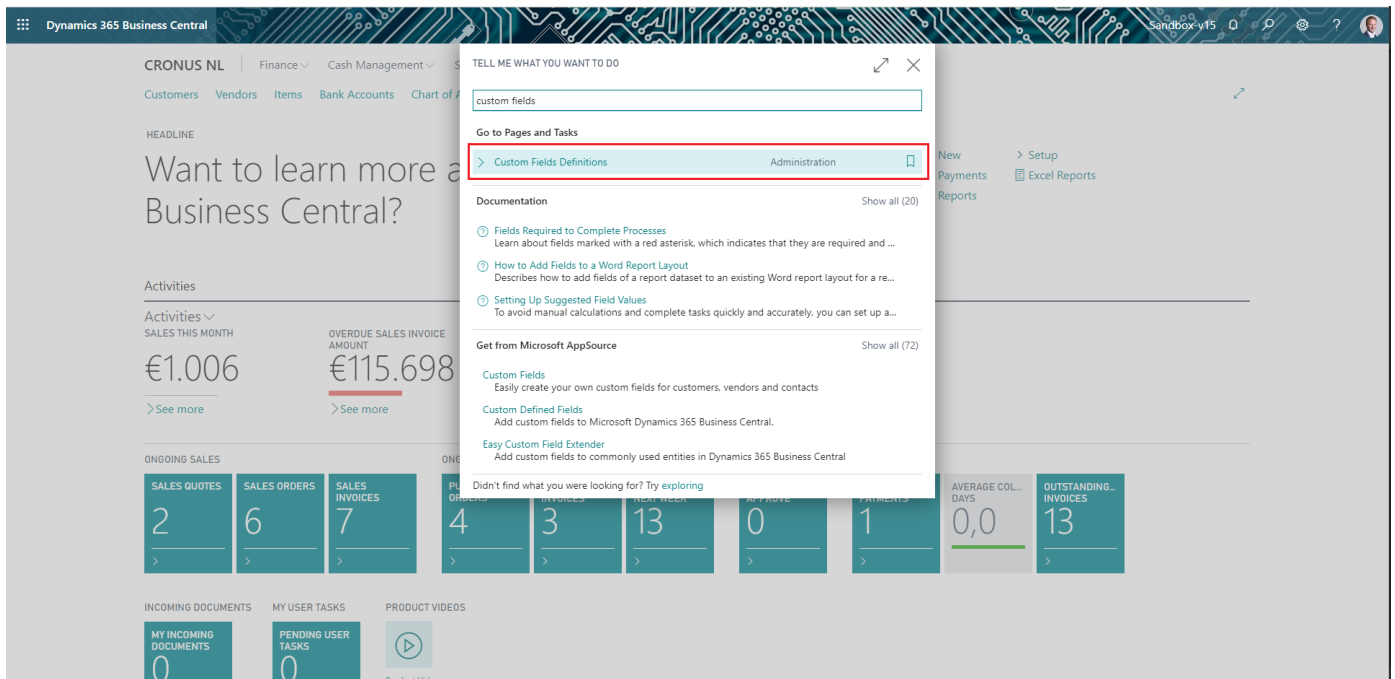
HOW TO USE

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Setup and Usage

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

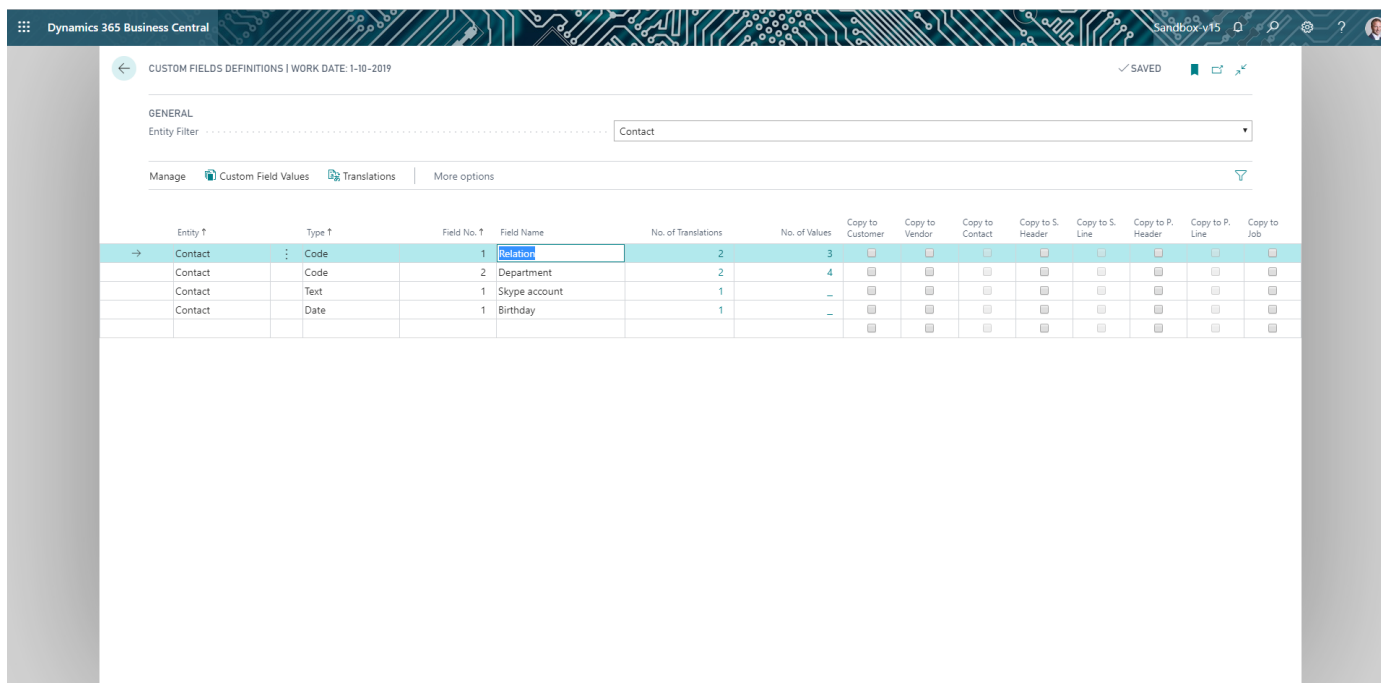


From the Custom Field Definitions page, it is possible to configure up to five custom fields for different data types for contacts, customers, vendors, items and jobs.

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 | WORK DATE: 1-10-2019

✓ SAVED

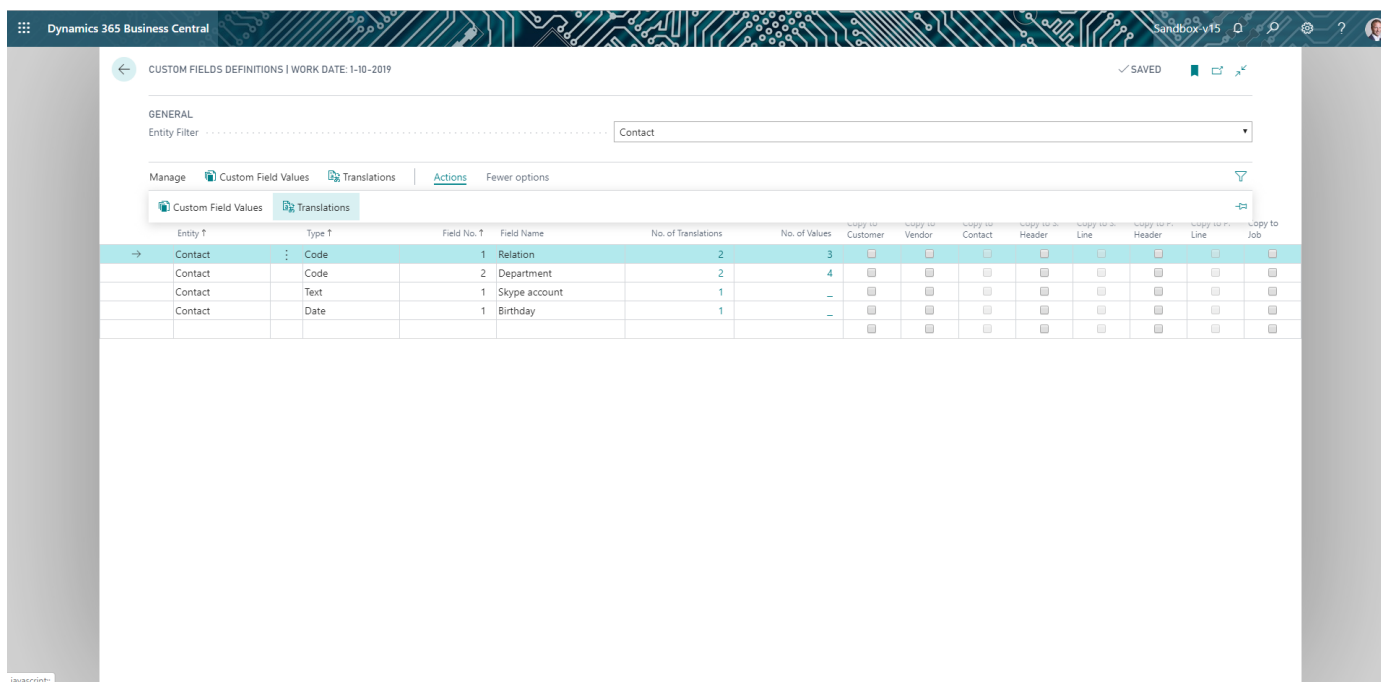
GENERAL

Entity Filter: Contact

Manage Custom Field Values Translations More options

Entity ↑	Type ↑	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
→ Contact	Code	1	Relation	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	2	Department	2	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Text	1	Skype account	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"/>
Contact	Date	1	Birthday	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"/>

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



← CUSTOM FIELDS DEFINITIONS | WORK DATE: 1-10-2019

✓ SAVED

GENERAL

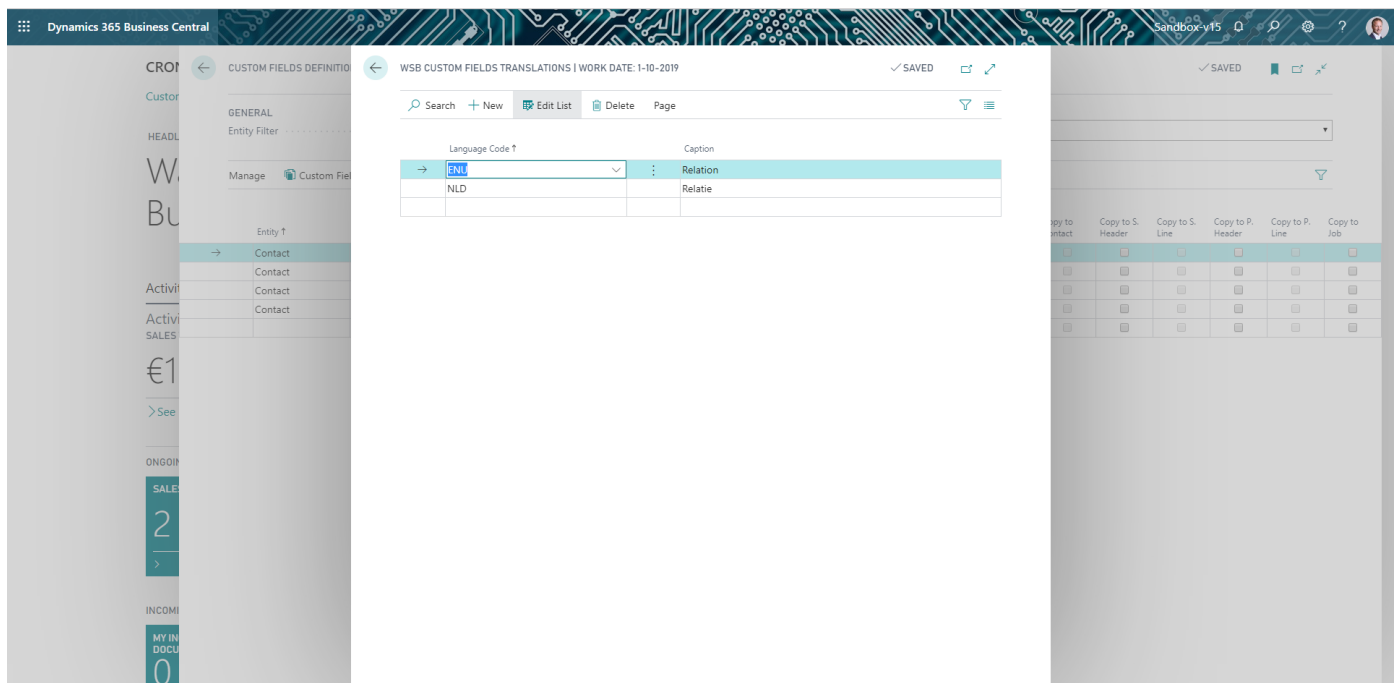
Entity Filter: Contact

Manage Custom Field Values Translations Actions Fewer options

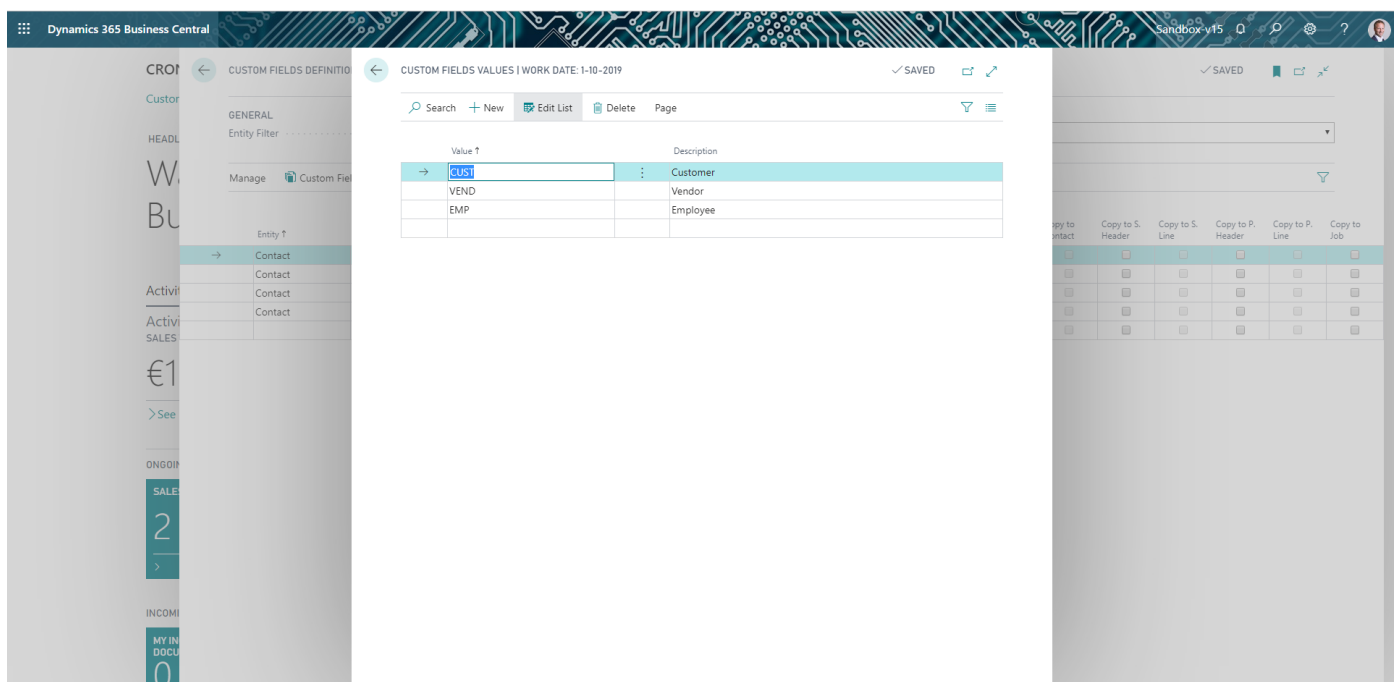
Custom Field Values Translations

Entity ↑	Type ↑	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
→ Contact	Code	1	Relation	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Code	2	Department	2	4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact	Text	1	Skype account	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"/>
Contact	Date	1	Birthday	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"/>

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



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:



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:

Dynamics 365 Business Central | WORK DATE: 1-10-2019

Search New Manage Process Contact Page More options

No.	Phone No.	Email	Salesperson Code	Territory Code	Relation	Department	Skype account	Birthday
CT000024			HD					
CT000023			HD					
CT000001		adatum.corporation@contoso...	KS					
CT000002		loek.walravens@contoso.com	KS					
CT000007		alpine.ski.house@contoso.com	KS	BUITENLAND	CUST	SALES		20-3-19
CT000008		ian.deberry@contoso.com	KS	BUITENLAND				
CT000011		fabrikam.inc@contoso.com	DB	BUITENLAND				
CT000012		krystal.york@contoso.com	DB	BUITENLAND				
CT000013		first.up.consultants@contoso.c...	DB					
CT000014		stern.westerink@contoso.com	DB					
CT000015		graphic.design.institute@cont...	DB	BUITENLAND				
CT000016		bryce.jasso@contoso.com	DB	BUITENLAND				
CT000028		klockefeer@wsb-solutions.nl						
CT000019		nod.publishers@contoso.com	DB					
CT000020		bart.vanderschans@contoso.co...	DB					
CT000027			HD					
CT000021		rabobank@contoso.com	HD					
CT000022		rabobank@contoso.com	HD					
CT000025			HD					
CT000026			HD					
CT000009		relecloud@contoso.com	KS					

Details Attachments (0)

Contact Statistics

GENERAL

Cost (LCY) 672.00
Duration (Min.) 84

OPPORTUNITIES

No. of Opportunities 3
Estimated Value (LCY) 10,450.00
Calcd. Current Value (LCY) 200.00

SEGMENTATION

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

https://businesscentral.dynamics.com/Sandbox-v15?company=CRONUS NL&runiframe=1#

Custom fields on Contacts List page

Dynamics 365 Business Central | WORK DATE: 1-10-2019

CONTACT CARD | WORK DATE: 1-10-2019

CT000007 · Alpine Ski House

Process Report More options

Foreign Trade >

Profile Questionnaire Manage

Question	Answer	Questions Answered (%)	Last Date Updated
(There is nothing to show in this view)			

Custom Fields

Relation CUST Birthday 20-3-1988

Department SALES

Skype account

Details Attachments (0)

Contact Picture

Contact Statistics

GENERAL

Cost (LCY) 672.00
Duration (Min.) 84

OPPORTUNITIES

No. of Opportunities 3
Estimated Value (LCY) 10,450.00
Calcd. Current Value (LCY) 200.00

SEGMENTATION

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

The screenshot shows the 'CONTACT CARD' for 'Alpine Ski House' (CT000007) in Microsoft Dynamics 365 Business Central. The interface includes a top navigation bar, a main content area with a 'Foreign Trade' section, and a right-hand sidebar with 'Details', 'Attachments', and 'Contact Statistics'. A dropdown menu is open for the 'Relation' custom field, showing options: 'CUST' (Customer), 'EMP' (Employee), and 'VEND' (Vendor). The 'CUST' option is selected. Below the dropdown, the 'Custom Fields' section shows 'Relation' set to 'CUST', 'Department' set to 'SALES', and 'Skype account' as an empty field. The 'Birthday' field is set to '20-3-1988'. The right-hand sidebar displays 'Contact Statistics' for 'GENERAL', 'OPPORTUNITIES', and 'SEGMENTATION'.

Value	Description
CUST	Customer
EMP	Employee
VEND	Vendor

Contact Statistics	
GENERAL	
Cost (LCY)	672.00
Duration (Min.)	84
OPPORTUNITIES	
No. of Opportunities	3
Estimated Value (LCY)	10,450.00
Calcd. Current Value (LCY)	200.00
SEGMENTATION	
No. of Job Responsibilities	0
No. of Industry Groups	0
No. of Business Relations	1
No. of Mailing Groups	0

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:

Microsoft Dynamics 365 Business Central interface showing the CUSTOM FIELDS DEFINITIONS page. The page displays a table of custom fields for the 'Customer' entity.

Entity Filter: Customer

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 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
Customer	Code	1	Relation	2	3	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer	Code	2	Customer Type	2	3	<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	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	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"/>

https://businesscentral.dynamics.com/Sandbox-v15?company=Cronus NL&runiframe=1#

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

Microsoft Dynamics 365 Business Central interface showing the CONTACT CARD for CT000007 · Alpine Ski House.

Foreign Trade >

Profile Questionnaire | Manage

Question	Answer	Questions Answered (%)	Last Date Updated
(There is nothing to show in this view)			

Custom Fields

Relation: CUST (dropdown menu)
Department: SALES (dropdown menu)
Skype account: (text field)

Birthday: 20-3-1988 (calendar icon)

Contact Statistics

GENERAL

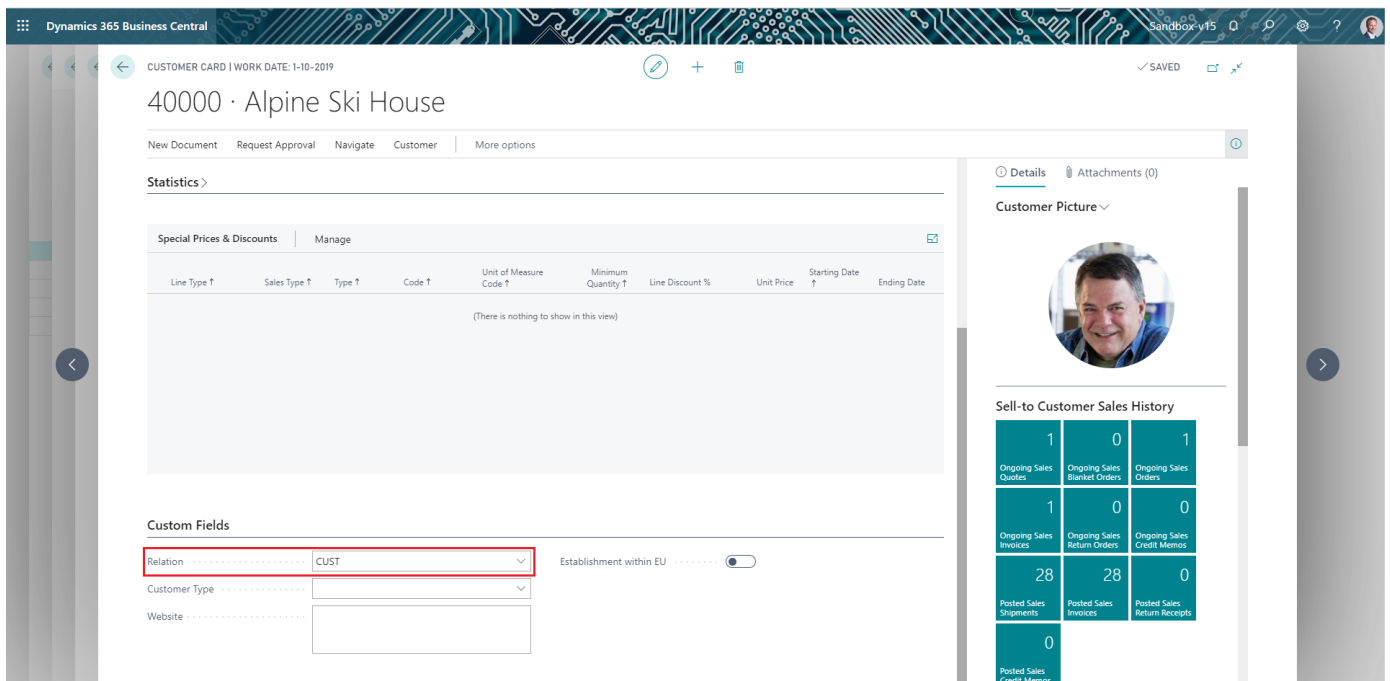
- Cost (LCY): 672.00
- Duration (Min.): 84

OPPORTUNITIES

- No. of Opportunities: 3
- Estimated Value (LCY): 10,450.00
- Calcd. Current Value (LCY): 200.00

SEGMENTATION

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



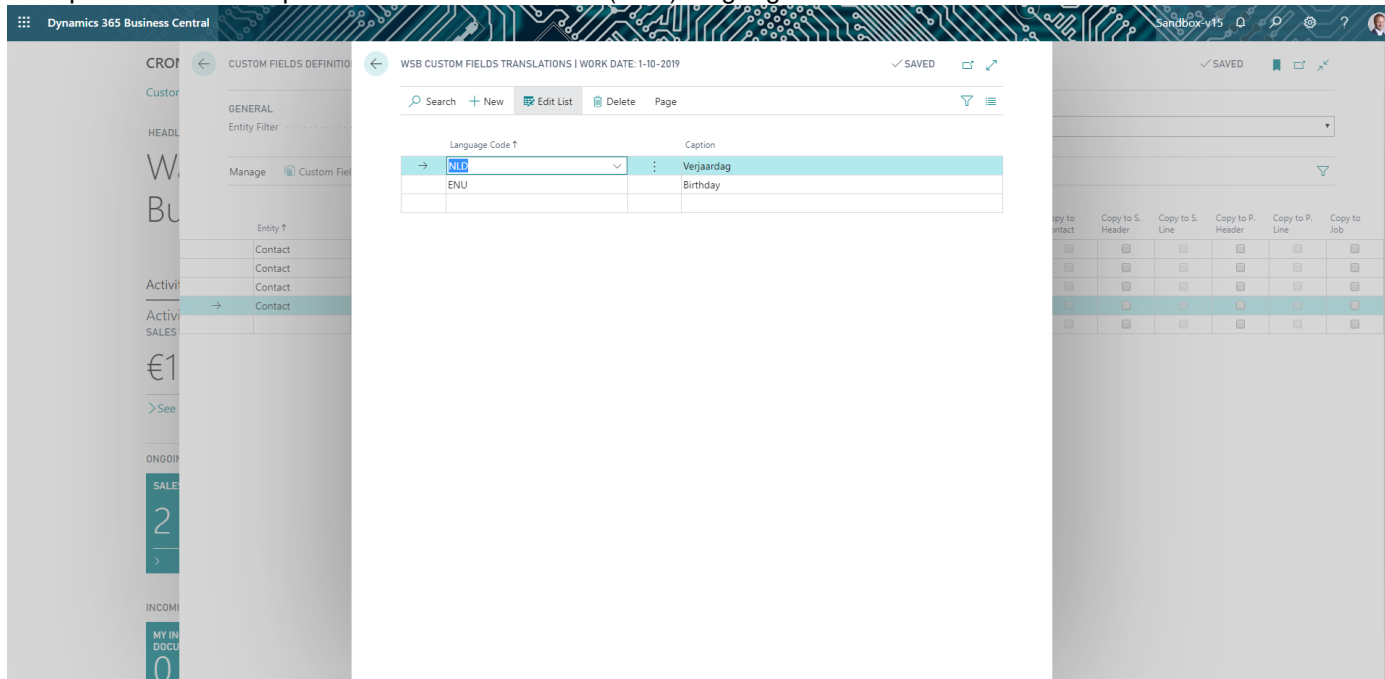
The screenshot shows the 'CUSTOMER CARD' for '40000 · Alpine Ski House' with a work date of 1-10-2019. The interface includes a top navigation bar, a left sidebar, and a main content area. The main content area is divided into several sections: 'Statistics' (with a 'Special Prices & Discounts' table), 'Custom Fields' (with a 'Relation' field set to 'CUST'), and a right-hand pane showing 'Details' and 'Attachments (0)'. The 'Details' pane includes a 'Customer Picture' and a 'Sell-to Customer Sales History' table.

Line Type ↑	Sales Type ↑	Type ↑	Code ↑	Unit of Measure Code ↑	Minimum Quantity ↑	Line Discount %	Unit Price	Starting Date ↑	Ending Date
(There is nothing to show in this view)									

1	0	1
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
28	28	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

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

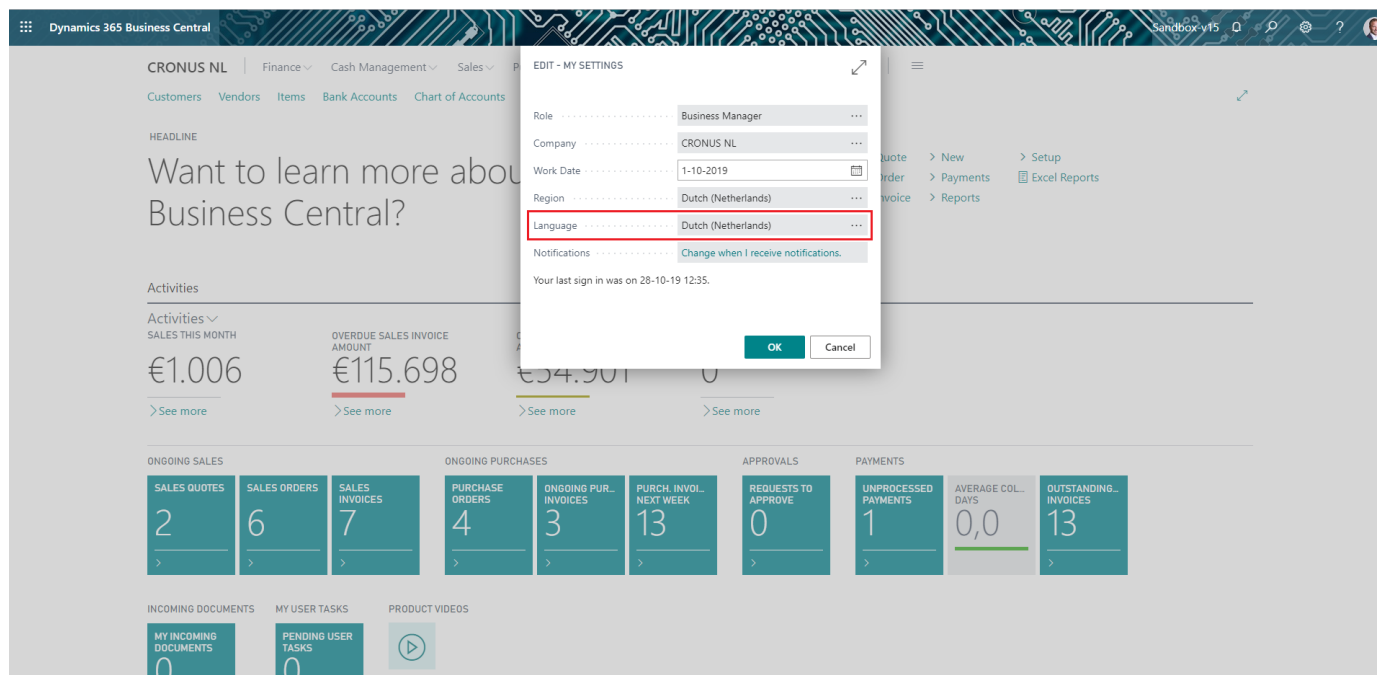
1. Set up custom fields caption translations for Dutch (NLD) language:



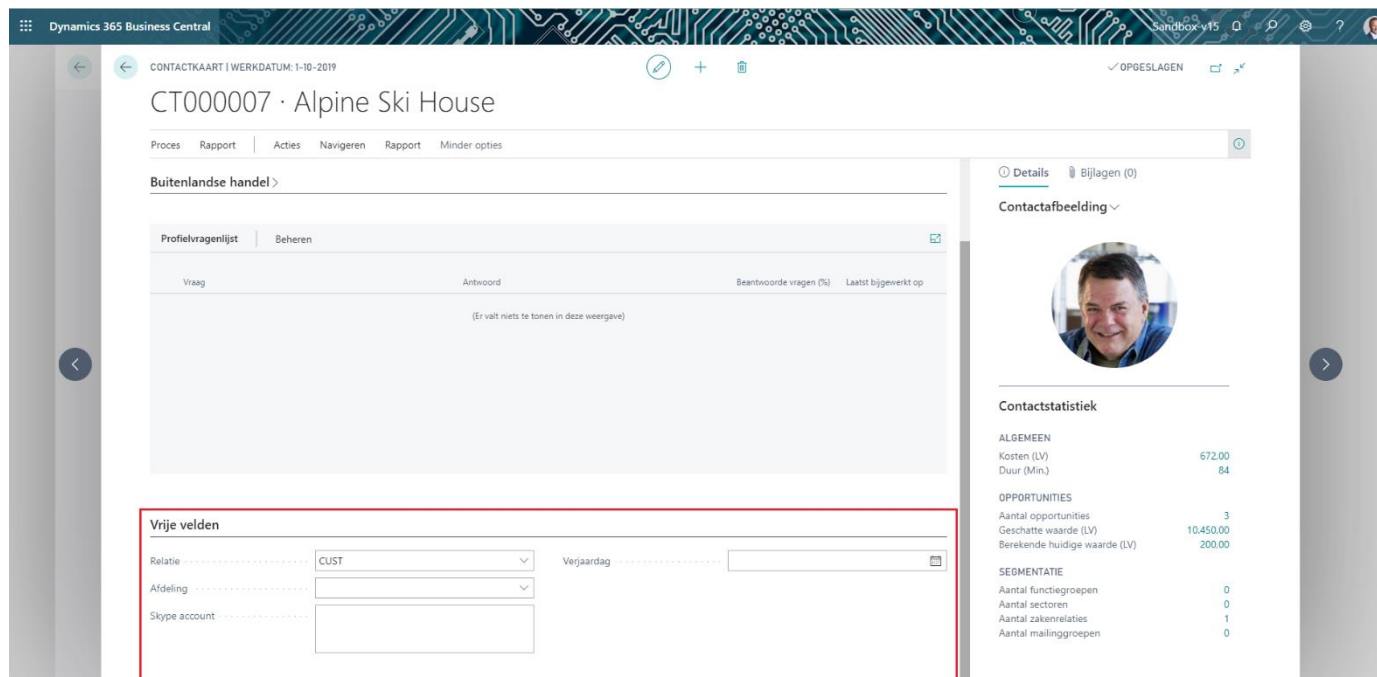
The screenshot shows the 'CUSTOM FIELDS DEFINITION' page for 'WSB CUSTOM FIELDS TRANSLATIONS'. The page has a top navigation bar, a left sidebar, and a main content area. The main content area is divided into two sections: 'GENERAL' (with 'Entity Filter' and 'Manage' buttons) and 'Custom Fields' (with a table of custom fields). The 'Custom Fields' table has columns for 'Language Code' and 'Caption'.

Language Code ↑	Caption
NLD	Verjaardag
ENU	Birthday

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



- 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:

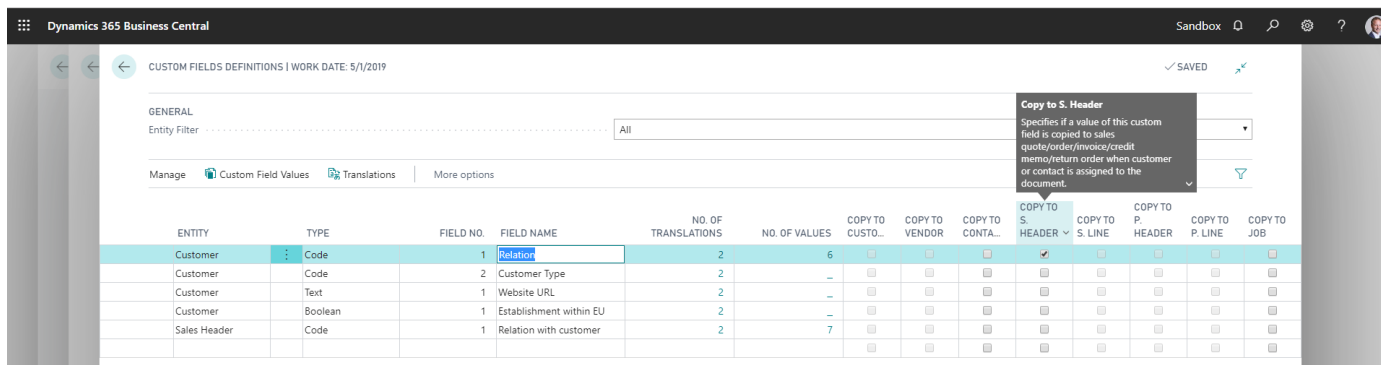


Scenario 4: Synchronization of custom fields between contacts, customers & vendors and their documents and jobs

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).

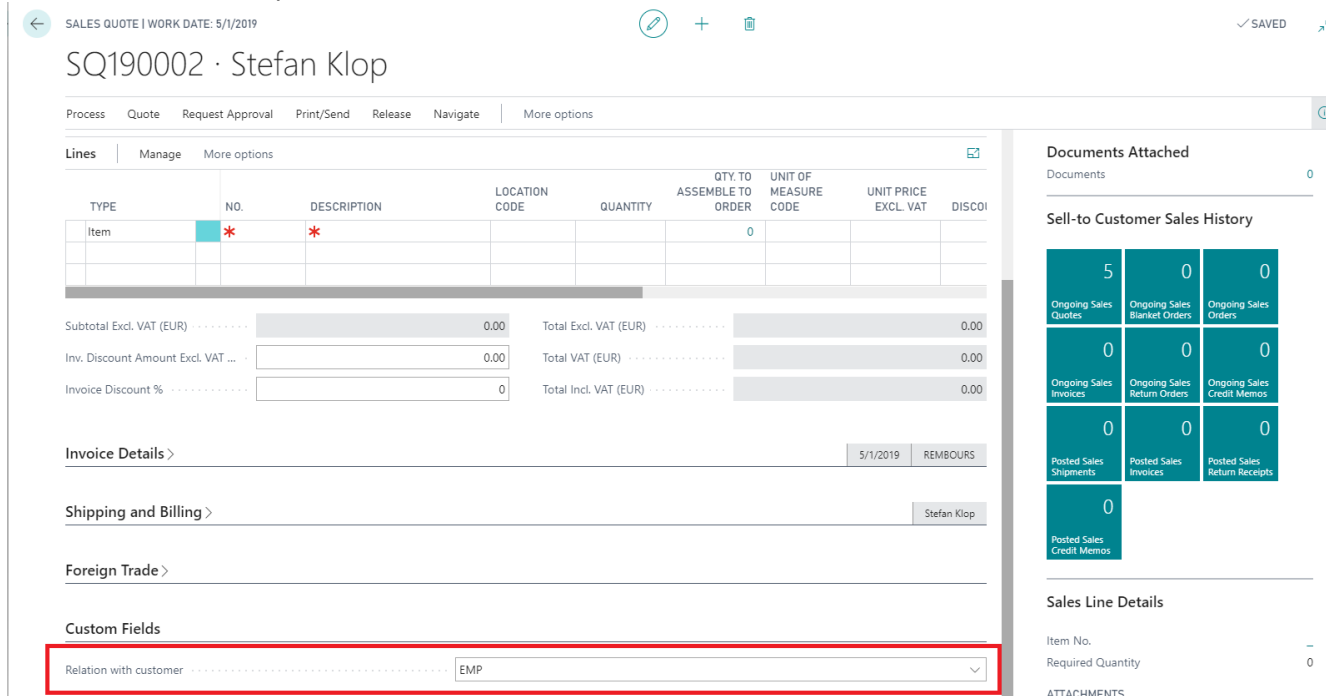
To set up transferring of a custom field of type Code from a customer to the header of a sales quote.

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:



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 checked="" type="checkbox"/>				
Customer	Code	2	Customer Type	2	-								
Customer	Text	1	Website URL	2	-								
Customer	Boolean	1	Establishment within EU	2	-								
Sales Header	Code	1	Relation with customer	2	7								

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

Lines Manage 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

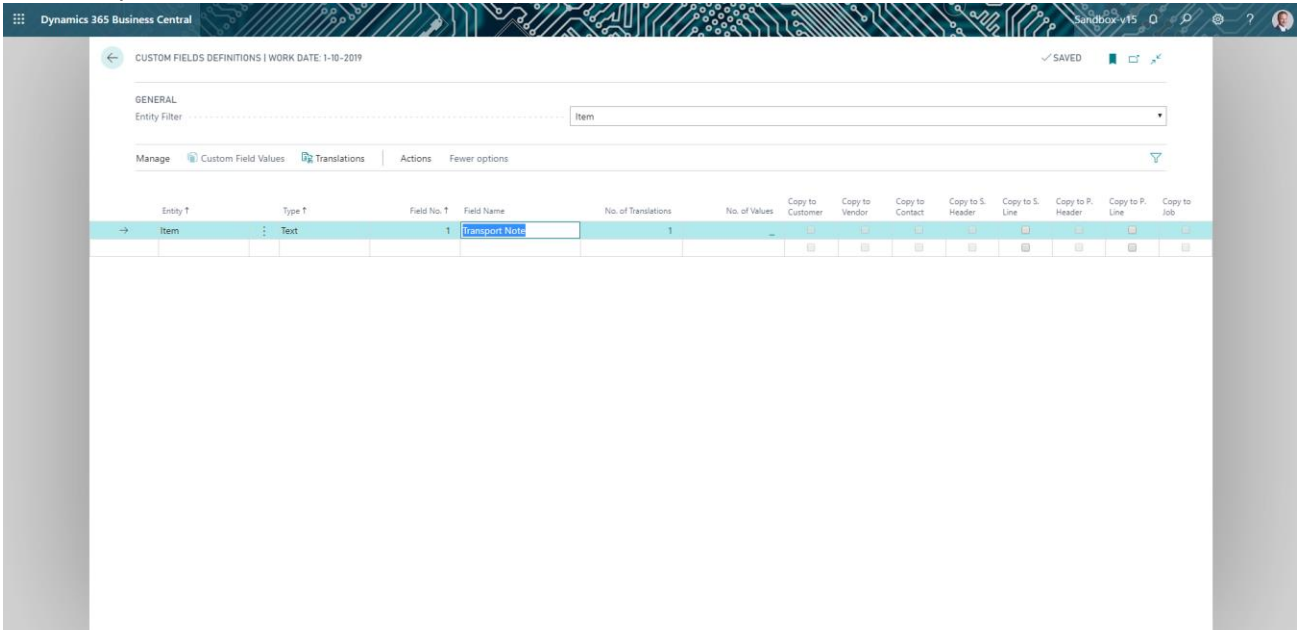
This same case is applicable for transferring values from vendors to purchase documents and customers to jobs.

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

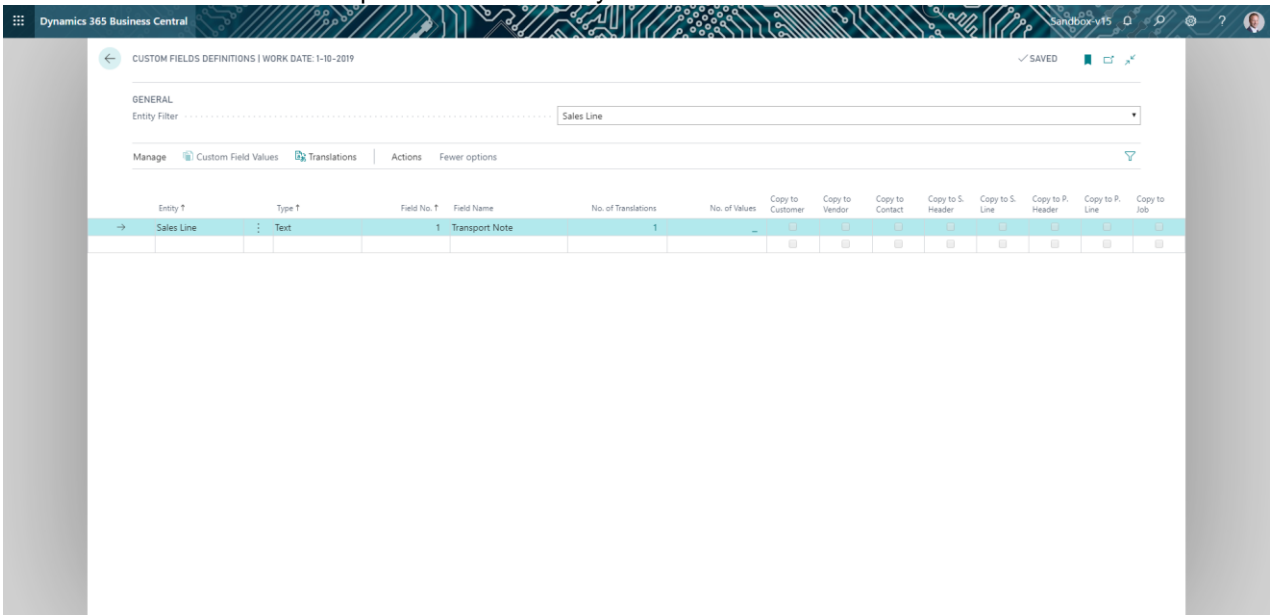
To set up transferring for a custom field of type Text from an item to a sales order line.

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.



Entity	Type	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
Item	Text	1	Transport Note	1									

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



Entity	Type	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
Sales Line	Text	1	Transport Note	1									

5. Choose the Item as Entity Filter on the Custom Field Definitions page.

- Copy to S. Line checkbox (sales line) on the field created at step 1 which should be transferred to the sales order line

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

- 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 Business Central

SALES ORDER | WORK DATE: 1-10-2019

101004 · Alpine Ski House

Process Release Posting Prepare Order Request Approval Print/Send Navigate More options

General > 13-5-2019 13-5-2019 13-6-2019

Lines Manage More options

Type	Qty. Assigned	Planned Delivery Date	Planned Shipment Date	Shipment Date	Department Code	Customergro... Code	Transport Note
Item	1	14-5-2019	13-5-2019	13-5-2019			
→ Item	1	14-5-2019	13-5-2019	13-5-2019			Deliver face-up

Subtotal Excl. VAT (EUR) 1,578.80 Total Excl. VAT (EUR) 1,578.80

Inv. Discount Amount Excl. VAT 0.00 Total VAT (EUR) 0.00

Invoice Discount % 0 Total Incl. VAT (EUR) 1,578.80

Invoice Details > 1M82D

Shipping and Billing > 11-9-2019

Foreign Trade >

Details Attachments (0)

Sell-to Customer Sales History

Ongoing Sales Quoties	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	1
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
1	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
28	28	0
Posted Sales Credit Memos		
0		

Customer Details >

Customer No. 40000

Name Alpine Ski House

Phone No.

Email ian.deberry@contoso.com

Fax No.

Credit Limit (LCY) 0.00

Available Credit (LCY) 0.00