



TQH Dimension Hierarchy

for Dynamics 365 Business Central



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Summary

The Dimension Hierarchy app extends existing standard dimensions functionality and creates links between dimensions which serves two main purposes:

- It allows to create tree hierarchy between various dimensions
- It auto-populates specific dimension values based on the dimensions structure set up starting from the top-level dimension value selected

Companies who have a fixed structure rules between financial dimensions used in their business will benefit from this solution by significantly reducing the time required during journals and orders creation.

Dimensions hierarchy set up

To start using the Dimension Hierarchy following steps must be performed:

- 1) **TQH Dimension Hierarchy** extension is loaded into Dynamics 365 Business Central
- 2) **TQH DIM HIERARCHY** Permission Set is assigned to a user(s)

TQH DIM HIERARCHY ...	TQH Dimension Hierarchy	TQH Dimension Hierarchy v.6	Tenant
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- 3) Dimension Values created
- 4) Linked Dimension setup added

Description and samples

Company has following 3 dimensions:

- Project
- Cost Centre
- Product Centre

CODE	NAME	CODE CAPTION	FILTER CAPTION	DESCRIPTION	BLOC...
COST CENTRE ...	Cost centre	Cost centre Code	Cost centre Filter	Cost Centre	<input type="checkbox"/>
PRODUCT CENT...	Product centre	Product centre Code	Product centre Filter	Product centre	<input type="checkbox"/>
PROJECT	Project	Project Code	Project Filter	Project	<input type="checkbox"/>

PROJECT dimension has following dimension subset of values created:

EDIT - DIMENSION VALUES - PROJECT · PROJECT + New

CODE	NAME
00000	Balance Sheet
40425	Corp Strategy
40448	Sales FAE EMEA
50001	PC_CEL
50002	PC_POS_OTHER
50003	PC_SharedServices_Other
50004	PC_IPR_Other
50005	PC_SHO
51030	MA
51031	MA_ADM
51032	MA_APL
51033	MA_MOD
51034	MA_VAL
51035	MA_SD1
51036	MA_CSD
51037	MA_PHY
51038	MA_SYS
51039	MA_BRD
51040	MA_CIP

COST CENTRE:

EDIT - DIMENSION VALUES - COST CENTRE · COST CENTRE + New

CODE		NAME
00000	...	Balance Sheet
40425	...	Corp Strategy
40448	...	Sales FAE EMEA
50001	...	PC_CEL
50002	...	PC_POS_OTHER
50003	...	PC_SharedServices_Other
50004	...	PC_IPR_Other
50005	...	PC_SHO
60000	...	Admin
60100	...	Legal
60200	...	HR
60300	...	IT

PRODUCT CENTRE:

EDIT - DIMENSION VALUES - PRODUCT CENTRE · PRODUCT CENTRE + New

CODE		NAME
000	...	Balance Sheet
400	...	Sales
501	...	Cellular
502	...	Positioning
503	...	ICD
504	...	IPR
505	...	Short Range
600	...	Admin

New setup allows to add linking dimension and code so that Project Code 40425, for example, has linked Cost Centre 40425, and Cost Centre 40425 in its turn has linked Product Centre 400 underneath. Same way Project Code 50030 has linked Cost Centre 50001 which in its turn has Product Centre 500.

To set up required links navigate to Dimensions page, select required dimension and click Dimension menu > Dimension Values.

Dimensions: <u>All</u>		Search	+ New	Manage	Dimension	Page	Actions
CODE	NAME	CODE CAPTION			Dimension Values		APTION
COST CENTRE	Cost centre	Cost centre Code			Account Type Default Dim.		re Filter
PRODUCT CENT...	Product centre	Product centre Code			Translations		centre Filter
PROJECT	Project	Project Code					Project Filter

Select dimension value and set relation to other dimension code by populating Linked Dimension Code (one of PROJECT, COST CENTRE OR PRODUCT CENTRE). We select COST CENTRE as per business rule and then select Linked Dimension Value Code from one of the existing COST CENTRE dimension values.

The whole setup will appear as shown below:

EDIT - DIMENSION VALUES - PROJECT - PROJECT + new

Code	Name	Dimension Value Type	Totalling	Blocked	Linked Dimension Code	Linked Dimension Value Code
00000	Balance Sheet	Standard		<input type="checkbox"/>	COST CENTRE	00000
40425	Corp Strategy	Standard		<input type="checkbox"/>	COST CENTRE	40425
40448	Sales FAE EMEA	Standard		<input type="checkbox"/>	COST CENTRE	40448
50001	Line Act	Standard		<input type="checkbox"/>	COST CENTRE	50001
50002	Line Act	Standard		<input type="checkbox"/>	COST CENTRE	50002
50003	Line Act	Standard		<input type="checkbox"/>	COST CENTRE	50003
50004	Line Act	Standard		<input type="checkbox"/>	COST CENTRE	50004
50005	Line Act	Standard		<input type="checkbox"/>	COST CENTRE	50005
51030	MA	Standard		<input type="checkbox"/>	COST CENTRE	50001
51031	MA_ADM	Standard		<input type="checkbox"/>	COST CENTRE	50001
51032	MA_APL	Standard		<input type="checkbox"/>	COST CENTRE	50001

This builds up Dimensions Hierarchy like:

Project Centre	Cost Centre	Product Centre
40425	40425	400
50002	50002	500
50001	50001	
51030		
51031		

Dimension hierarchy usage scenarios

When entering dimensions on journals, orders or other documents, selecting Project Centre and its value will auto-populate all linked dimensions from hierarchy set above. For example, selecting Project Centre 40425 will automatically add and set Cost Centre 40425 and Product Centre 400.

Go to Cash management menu, open Payment journals. Click journal name to create new journal (CASHPAY).

NAME	DESCRIPTION	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	NO. SERIES	POSTING NO. SERIES	REASON CODE	COPY VAT SETUP TO	ALL... VAT DIFFER	ALL... PAYME EXPOS	SUG... BALAN AMOUI
CASHPAY	Cash payments	Vendor		GJNL-PMT			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

From the top action pane, select HOME > Dimensions:

Dynamics 365 > Business Central > Payment Journals > CASHPAY-Cash payments

HOME
ACTIONS
NAVIGATE

Delete
Post
Post and Print
Suggest Vendor Payments...
Suggest Employee Payments...

Dimensions

Apply Entries...
Print Cheque...
Export...
Transmit...
Void Cheque

Credit Transfer Reg. Entries
Credit Reg
Bank

EDIT - PAYMENT JOURNAL

Batch Name

POSTING DATE	DOCUME... TYPE	DOCUME... NO.	EXTERNAL DOCUMENT NO.	ACCOUNT TYPE	ACCOUNT NO.	RECIPIENT BANK ACCOUNT	MESSA
16/04/20	Payment	G04001		G/L Account *			

Dimensions

View or edit dimensions, such as area, project, or department, that you can assign to sales and purchase documents to distribute costs and analyse transaction history.

On the Edit Dimension Set Entries page opened, populate top level/parent dimension code and select value (40425, for example):

HOME

EDIT - PAYMENT CASHPAY 0 - EDIT DIMENSION SET ENTRIES + New

DIMENSION CODE		DIMENSION VALUE CODE		DIMENSION VALUE NAME
PROJECT	

CODE	NAME
00000	Balance Sheet
40425	Corp Strategy
40448	Sales FAE EMEA
50001	PC_CEL
50002	PC_POS_OTHER
50003	PC_SharedServices_Other

Select from full list

Press the TAB key to allow selected value to be saved and processed which will automatically populate other linked dimensions set up previously.

HOME

EDIT - PAYMENT CASHPAY 0 - EDIT DIMENSION SET ENTRIES + New

DIMENSION CODE		DIMENSION VALUE CODE		DIMENSION VALUE NAME
PROJECT	...	40425		Corp Strategy
COST CENTRE	...	40425		Corp Strategy
PRODUCT CENTRE	...	400		Sales

Close

All dimensions are now added to journal:

EDIT - PAYMENT JOURNAL ✕

Batch Name ...

POSTING DATE	CREDITOR NO.	AMOUNT	AMOUNT (LCY)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	PROJECT CODE	SHORTCUT DIMENSION 3 CODE	SHORTCUT DIMENSION 4 CODE
16/04/20	...	0.00	0.00	Vendor		40425	40425	400

Dimensions can be changed following same pattern – changing PROJECT CODE value will automatically change linked COST CENTRE AND PRODUCT CENTRE dimension values.

Changing PROJECT CODE from 40425 to 50001:

EDIT - PAYMENT JOURNAL

Batch Name

POSTING DATE	AMOUNT	AMOUNT (LCY)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	PROJECT CODE	SHORTCUT DIMENSION 3 CODE	SHORTCUT DIMENSION 4 CODE	UBF
16/04/2018	...	0.00	0.00	Vendor	40425	40425	400	

CODE	NAME
00000	Balance Sheet
40425	Corp Strategy
40448	Sales FAE EMEA
50001	PC_CEL
50002	PC_POS_OTHER
50003	PC_SharedServices_Other

[Select from](#)

will result in all three dimensions to have new values in one click instead of changing all one by one.

EDIT - PAYMENT JOURNAL

Batch Name

CASHPAY

POSTING DATE	AMOUNT	AMOUNT (LCY)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	PROJECT CODE	SHORTCUT DIMENSION 3 CODE	SHORTCUT DIMENSION 4 CODE
16/04/2018	0.00	0.00	Vendor		50001	50001	501

The Dimension Structure app is applicable for situations when there is 1:1 relation between dimensions, i.e. parent dimension drives and defaults all the remaining set of linked dimensions. The functionality also restricts users from changing values of populated linked dimensions (COST CENTRE and PRODUCT CENTRE) with an error message displayed.

Support and Availability

Supported Editions

This app supports the Essentials and Premium Editions of Dynamics 365 Business Central

Supported Countries

United Kingdom and United States