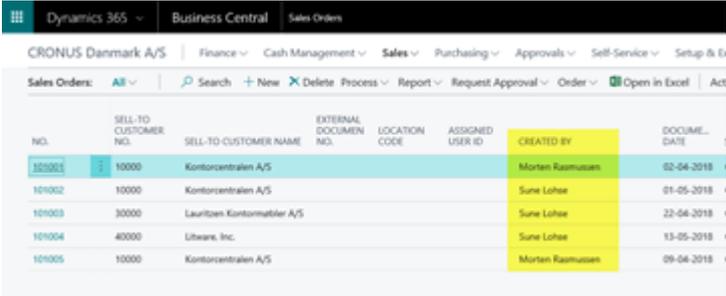


Created-by on Documents

Keep track of who created the initial documents

Have you ever wanted to track who created the original Sales Order or Purchase Order?

And to your surprise, this information is generally not available in your Microsoft Dynamics 365 Business Central.



NO.	SELL-TO CUSTOMER NO.	SELL-TO-CUSTOMER NAME	EXTERNAL DOCUMENT NO.	LOCATION CODE	ASSIGNED USER ID	CREATED BY	DOCUMENT DATE
101001	10000	Kontorcentralen A/S				Morten Rasmussen	02-04-2018
101002	10000	Kontorcentralen A/S				Sune Lohse	01-05-2018
101003	30000	Lauitzten Kontorcentraler A/S				Sune Lohse	22-04-2018
101004	40000	Lithware, Inc.				Sune Lohse	13-05-2018
101005	10000	Kontorcentralen A/S				Morten Rasmussen	09-04-2018

Created-by on Documents is a simple and free extension that helps you to get insight into who created the original documents.

When you have installed **Created-by on Documents** in your Dynamics 365 Business Central, it simply enables a "Created by" field which is displayed on the "General" fast-tab on the various Sales and Purchase Documents and in the various Order lists.

When you enter an order - the "Created by" field will automatically be populated with the name of the user, and it will automatically keep track of the users on archived documents and posted documents - easily viewable for tracking purposes.

Setup

Once you have installed the **Created-by on Documents** extension into your Dynamics 365 Business Central, you are ready to go. There is no need for setup.

The "Created by" field will appear on the various types of Purchase documents and Sales documents pages such as:

- Sales Order, Quote, Invoice, Credit Memo, Return Order, Blanket Sales Order, Sales Order Archives
- Sales Order List, Quote List, Invoice List, Credit Memo List, Return Order List, Blanket Sales Order List
- Posted Sales Shipment, Posted Sales Invoice, Posted Credit Memo
- Posted Sales Shipment List, Posted Sales Invoice List, Posted Sales Credit Memo List
- Purchase Order, Quote, Invoice, Credit Memo, Return Order, Blanket Purchase Order, Purchase Order Archives
- Purchase Order List, Quote List, Credit Memo List, Return Order List, Blanket Purchase Order List
- Posted Purchase Receipt, Posted Purchase Invoice, Posted Purchase Credit Memo
- Posted Purchase Receipt List, Posted Purchase Invoice List, Posted Purchase Credit Memo List



Available from Microsoft AppStore

Read more at:

Abakion.com / Created By

Step-by-Step instructions

The following is a guideline for using the Created-by on Documents

1. New Sales Order Example

- a. Open your Dynamics 365 Business Central.
- b. Create a new Sales Order.

The screenshot shows the Dynamics 365 Business Central dashboard for 'CRONUS Danmark A/S'. The top navigation bar includes 'Dynamics 365' and 'Business Central'. Below the navigation, there are several menu items: Finance, Cash Management, Sales, Purchasing, Approvals, Self-Service, Setup & Extensions, and Intelligent Cloud Insights. The main content area features a 'Your top customer was' section with a card for 'Kontorcentralen A/S' showing a purchase amount of 1.339 kr. Below this, there are 'Activities' and 'Key Metrics' sections. The 'Key Metrics' section includes: SALES THIS MONTH (11.966kr), OVERDUE SALES INVOICE AMOUNT (585.914kr), OVERDUE PURCH. INVOICE AMOUNT (277.320kr), SALES INVOICES PREDICT... OVERDUE (0), ONGOING PURCHASES (PURCHASE ORDERS: 4, ONGOING PURCH. INVOICES: 3, PURCH. INVOIC... NEXT WEEK: 0), PAYMENTS (UNPROCESSED PAYMENTS: 1, AVERAGE COLLECT... DAYS: 0,0, OUTSTANDING... INVOICES: 10), INCOMING DOC... (MY INCOMING DOCUMENTS: 1), and MY USER TASKS (PENDING USER TASKS: 0).

- c. Enter the Customer No. and select the Customer.

The screenshot shows the 'Sales Order' form in Dynamics 365 Business Central. The form is titled 'Sales Order' and has a navigation bar with 'Process', 'Posting', 'Request Approval', 'Actions', 'Navigate', and 'Less options'. The 'General' section is active, and the 'Customer Name' field is highlighted with a red asterisk. A dropdown menu is open, showing a list of customers with columns for 'NO.', 'NAME', 'CITY', and 'PHONE NO.'. The first customer, 'Kontorcentralen A/S' with NO. 10000 and City Nyborg, is highlighted in green. Other customers listed include Ravel Møbler (NO. 20000, Atlanta), Lauritzen Kontormøbler A/S (NO. 30000, Koge), Litware, Inc. (NO. 40000, Hilliard), and Relecloud (NO. 50000, Guildford). A '+ New' button and a 'Select from full list' link are also visible at the bottom of the dropdown. Below the dropdown, the 'Lines' section is partially visible, showing columns for 'TYPE', 'NO.', 'DESCRIPTION', 'LOCATION CODE', 'QUANTITY', 'RESERVED QUANTITY', 'UNIT OF MEASURE CODE', 'UNIT PRICE EXCL. VAT', and 'LIN DISCOUNT %'.

d. The Created by will automatically populate after the Customer is selected on the new order.

101005 · Kontorcentralen A/S

Process Posting Request Approval Actions Navigate Less options

General Show more

Customer Name: Kontorcentralen A/S Contact: Robert Townes

SELL-TO: Posting Date: 09-04-2018

Contact Phone No.: Order Date: 09-04-2018

Contact Fax No.: Due Date: 09-05-2018

Contact E-Mail: robert.townes@contoso.com Requested Delivery Date:

Contact Role: External Document No.:

Created By: Morten Rasmussen

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	RESERVED QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. VAT	DISCOUNT %
Item	1988-S	SEOUL Gæstestol, rød		*	-	STK	1.071.00	

Subtotal Excl. VAT (DKK) 0.00 Total Excl. VAT (DKK) 0.00

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

Invoice Discount % 0 Total Incl. VAT (DKK) 0.00

e. When finished, the Created by will display in the Sales Order list view.

NO.	SEL-TO CUSTOMER NO.	SEL-TO CUSTOMER NAME	EXTERNAL DOCUMENT NO.	LOCATION CODE	ASSIGNED USER ID	CREATED BY	DOCUME. DATE	STATUS	COM. SHIPPE	AMOUNT SHIPPED NOT INVOICED (LCY)	AMOUNT SHIPPED NOT INVOICED (LCY) INCL. VAT
101001	10000	Kontorcentralen A/S				Morten Rasmussen	02-04-2018	Open	No	0.00	0.00
101002	10000	Kontorcentralen A/S				Sune Lohse	01-05-2018	Open	No	0.00	0.00
101003	30000	Lauritzen Kontormøbler A/S				Sune Lohse	22-04-2018	Open	No	0.00	0.00
101004	40000	Litware, Inc.				Sune Lohse	13-05-2018	Open	No	0.00	0.00
101005	10000	Kontorcentralen A/S				Morten Rasmussen	09-04-2018	Open	No	0.00	0.00

Customer Statistics

Customer No. 10000
Balance (LCY) 64,278.75

SALES

Outstanding Orders (LCY) 133,937.50
Shipped Not Invd. (LCY) 0.00
Outstanding Invoices (LCY) 125,685.00

Total (LCY) **323,901.25**
Credit Limit (LCY) 0.00
Overdue Amounts (LCY) as of... 62,940.00
Total Sales (LCY) 338,149.00
Invoiced Prepayment Amount... 0.00

Customer Details

Customer No. 10000
Phone No.

2. Repeat these steps for other purchase and sales documents.