

Dimension Manager Setup Documents for Microsoft Dynamics 365 Business Central

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1. INTRODUCTION

Dimension Manager gives you the ability to navigate through any posted document or transaction, and to add, change, or delete dimensions on documents and all related entries created when the document was originally posted. This saves you the long, tedious process of reversing out, recreating, and reposting the document.

We also understand that this power can be dangerous, so access to these functions can be tightly controlled by permissions security and posting date range. You'll have a complete audit trail of who changed what and when, and there's even an undo function to get you right back to where you started.

Have you ever had a great idea for a dimension and wanted to report on your historical data for that dimension? Now you can set up new dimensions on a customer, for example, and automatically update all the historical entries and transactions from that customer, instantly enabling you to run reports on that dimension.

Works with all Microsoft Dynamics NAV (Navision) dimension types-global and extended (shortcut).

Large budgets can be time-consuming to update. Dimension Manager will allow users to batch change Dimensions in budgets.

FEATURES

- Add or change dimensions without having to reverse out and recreate documents and transactions.
- Have the freedom and flexibility to create and assign new dimensions to customers, items and vendors.
- Report on historical data by updating dimensions.

HIGHLIGHTS

- Quickly modify any document or transaction with updated dimensions
- Batch change dimensions for filtered lists of transactions or ledger entries
- Built-in protections include security, audit trail, and undo functions
- Great for fixing user errors, closing periods, and overall super-user sanity
- Update historical transactions with new dimensions
- View extended dimensions in the G/L Entry table instead of just the NAV global dimension

2. Dimension Management Setup

- 2.1. Search the “**Dimension Management Setup**” Page
- 2.2. Click and open the Dimension Management Setup Page

←

✓ SAVED

Dimension Management Setup

Process VLDM Roles Actions Fewer options

Version VLDM4.19

General

Enable Dimension M... ☒

Enable Posting Date ... ☐

Allow Batch Changes... ☐

Auto Purge Days 0

- 2.3. In “Dimension Management Setup” page, click on “**Update Doc Line Nos**” Action button. It will update the custom “Document Line No.” field in sales, purchase posted documents and after updating it will allow to change the dimensions. It’s a mandatory step. Please follow below steps to perform the Update Doc Line Nos action.

←

✓ SAVED

Dimension Management Setup

Process VLDM Roles Actions Fewer options

Update Doc Line Nos Update G/L Shortcut Dimensions

General

Enable Dimension M... ☒

Enable Posting Date ... ☐

Allow Batch Changes... ☐

Auto Purge Days 0

- 2.4. Once click on **Update Doc Line Nos** it popups a page where you can fill the dates. Enter **Start Date** and **End Date** then click on **Close** button.

Manage

EDIT - VLC UPDATEDOCLINESREQUESTPAGE



Options

Start Date 1/1/2001

End Date 1/1/2022

Close

Successfully updated document line number.

OK

2.5. In “**Dimension Management Setup**” page Click on “**Update G/L Shortcut Dimensions**” action button it will update the shortcut dimension value to “General Ledger Entries”.

✓ SAVED

Dimension Management Setup

[Process](#) [VLDM Roles](#) [Actions](#) [Fewer options](#)

General

Enable Dimension M...

Enable Posting Date ...

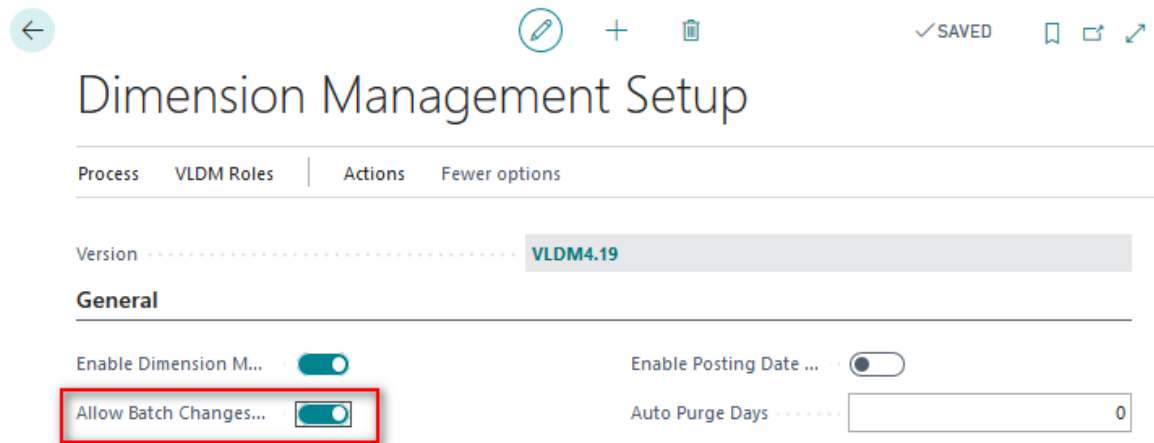
Allow Batch Changes...

Auto Purge Days

Completed

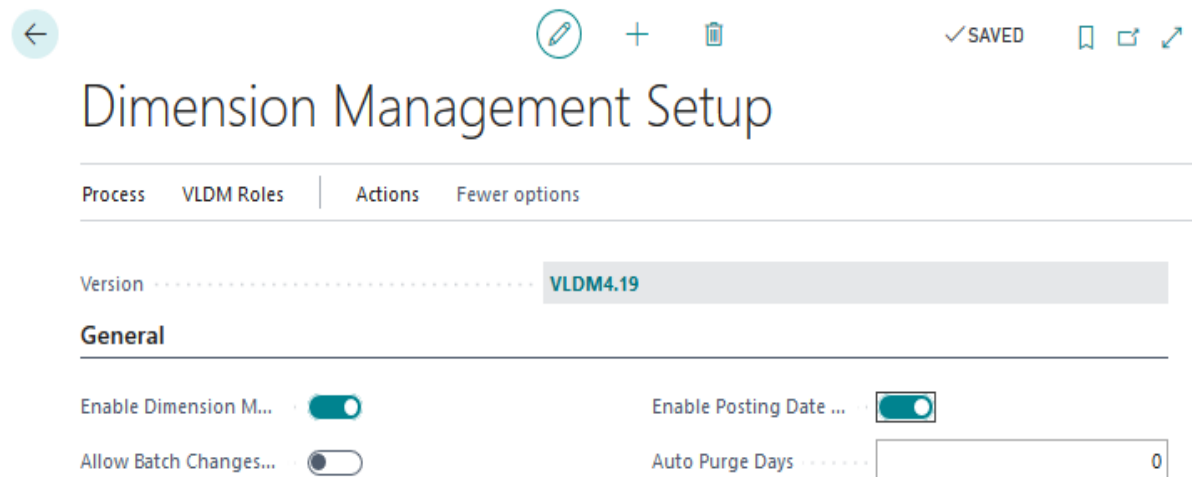
OK

- 2.6. In Dimension Management Setup page check mark, the “**Allow Batch Changes for Master**” option. Dimensions will be changed for all masters like **customer**, **vendor** and **item**.



The screenshot shows the 'Dimension Management Setup' page. At the top, there are navigation icons (back, edit, add, delete) and a 'SAVED' status. Below the title, there are tabs for 'Process', 'VLDM Roles', 'Actions', and 'Fewer options'. The 'Version' is 'VLDM4.19'. Under the 'General' section, there are four toggle switches: 'Enable Dimension M...' (checked), 'Enable Posting Date ...' (unchecked), 'Allow Batch Changes...' (checked, highlighted with a red box), and 'Auto Purge Days' (set to 0).

- 2.7. In Dimension Management Setup page check mark, the “**Enable Posting Date**” option. If you want to update the dimensions according to the posting Date, then **enable posting date** Boolean.



The screenshot shows the 'Dimension Management Setup' page. At the top, there are navigation icons (back, edit, add, delete) and a 'SAVED' status. Below the title, there are tabs for 'Process', 'VLDM Roles', 'Actions', and 'Fewer options'. The 'Version' is 'VLDM4.19'. Under the 'General' section, there are four toggle switches: 'Enable Dimension M...' (checked), 'Enable Posting Date ...' (checked), 'Allow Batch Changes...' (unchecked), and 'Auto Purge Days' (set to 0).

NOTE: We cannot enable **Allow Batch Changes for master** and **Enable Posting Date**. Either one must be selected in the setup.