



User Guide

Easy Custom Field Extender for Dynamics 365 Business Central

Last updated: April 30, 2024

TABLE OF CONTENTS

Table of Contents 2

1. About 3

2. Configuration & Functionality 4

4. Security 7

5. Registration 8

1. ABOUT



The Easy Custom Field Extender for Microsoft Dynamics 365 Business Central app allows users to add up to Add up to 3 custom fields to different entities. Custom fields allow users to customize the system and keep track of any special information relevant to their individual company. Customize your system as you see fit. No coding needed!

Entities Supported (3 fields per entity):

- Customer
- Vendor
- Item
- Sales Header (i.e. Sales Quote, Sales Order, Sales Invoice, and Sales Credit Memo)
- Purchase Header (i.e. Purchase Order, Purchase Invoice, and Purchase Credit Memo)

Features:

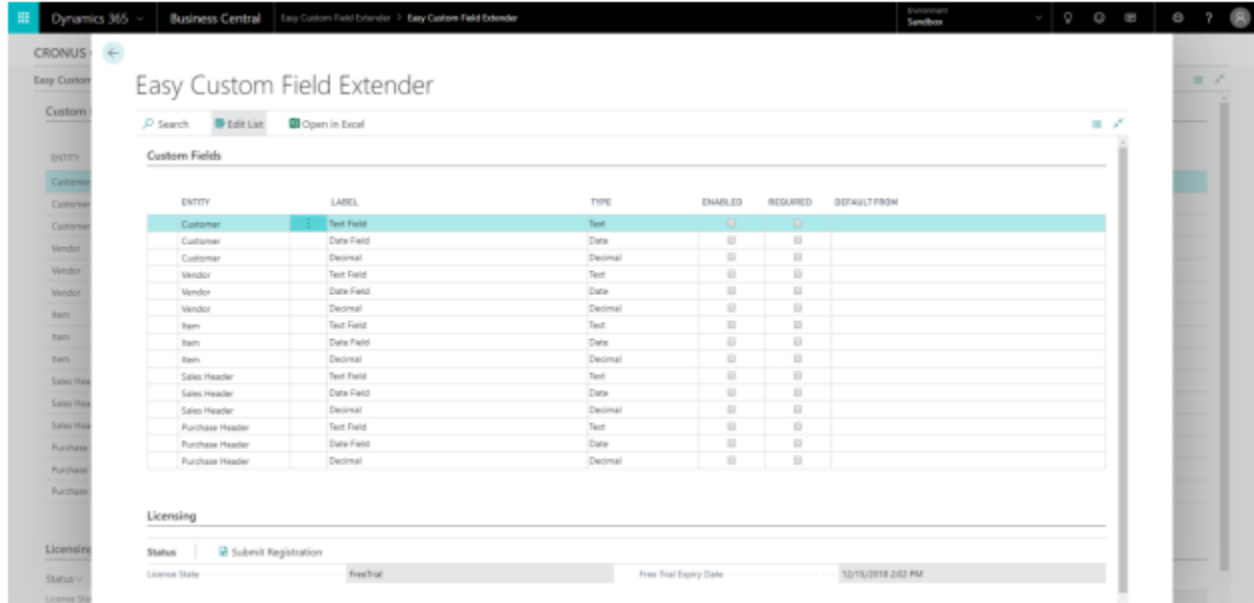
- Customize label names
- Data type options available: Text, Date and Decimal
- Create required fields
- Add default fields to transactions (ex. can have a custom field on the Vendor card that defaults on every Purchase Invoice created for that vendor).

For more information, please visit: <https://www.websan.com/easy-custom-field-extender>

2. CONFIGURATION & FUNCTIONALITY

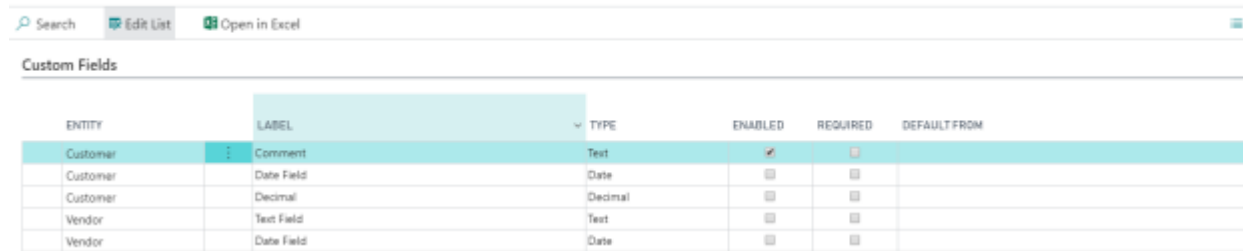
The application can be registered within the Assisted Setup. However, no formal app specific setup is required to begin using the application.

The app can be accessed by searching for Easy Custom Field Extender in the universal search.



To have a custom field in an entity, the 'Enabled' field must be checked. When unchecking this field, related defaults will be unlinked unless the user declines the prompt. The Entity column is for reference. The fields will show in the actual entity in the same order as in the list here. Labels are the name of the field in the entity. The label text can be changed and must be unique per entity.

Easy Custom Field Extender



← CUSTOMER CARD ✎ + 🗑

10000 · Adatum Corporation

New Document Request Approval Customer | Actions Navigate Report ... ⓘ

General Show less

No. 10000 ...	Document Sending P... ..
Name Adatum Corporation	Total Sales 118,535.34
IC Partner Code ▾	Costs (LCY) 60,974.21
Balance (LCY) 939.11	Profit (LCY) 31,024.83
Balance Due (LCY) 0.00	Profit % 33.7
Credit Limit (LCY) 0.00	CFDI Purpose ▾
Blocked ▾	CFDI Relation ▾
Privacy Blocked <input checked="" type="checkbox"/>	Last Date Modified 12/10/2018
Salesperson Code PS ▾	Comment <input type="text"/>

Type represents the data type of the field. When this is changed, the data in this field will be erased from all records and any defaults associated with it will be unlinked unless the user declines the prompt

ENTITY	LABEL	TYPE	ENABLED	REQUIRED	DEFAULT FROM
Customer	Comment	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Customer	Date Field	Date	<input type="checkbox"/>	<input type="checkbox"/>	
Customer	Date of Comment	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Vendor	Text Field	Text	<input type="checkbox"/>	<input type="checkbox"/>	

The required checkbox will cause a red asterisk to show next to the field when it is empty. Required fields in an entity that can be posted will not allow posting to go through until it is populated.

Document Date	4/2/2018 <input type="text"/>	
Posting Date	4/2/2018 <input type="text"/>	<input type="text"/>
Order Date	4/2/2018 <input type="text"/>	<input type="text"/>
		Customer Request * <input type="text"/>

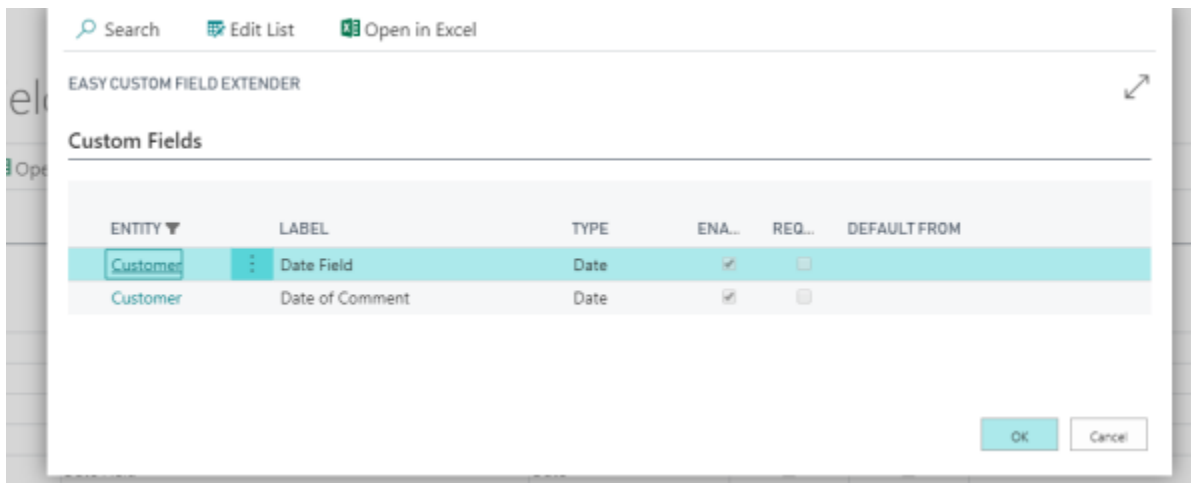
The default from column let's the user make a one-way connection from a customer/vendor custom field to a sales/purchase custom field. When established between two enabled fields, whenever the user makes a document from a customer/vendor or manually sets them in a document, the data will copy from the custom field in the customer/vendor to the document's

respective custom field. The default from field can only be set from the lookup (three dots button after clicking the field), typing in the box will give an error. The lookup will show the fields that can be used to default from, which will be customer or vendor fields with the same data type. Once a field is selected, the label of the field used to default from will show in the Default From column.

1. Click the default from field and select the ellipsis

ENTITY	LABEL	TYPE	ENABLED	REQUIRED	DEFAULTFROM
Customer	Comment	Text	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Customer	Date Field	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Customer	Date of Comment	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Vendor	Text Field	Text	<input type="checkbox"/>	<input type="checkbox"/>	
Vendor	Date Field	Date	<input type="checkbox"/>	<input type="checkbox"/>	
Vendor	Decimal	Decimal	<input type="checkbox"/>	<input type="checkbox"/>	
Item	Text Field	Text	<input type="checkbox"/>	<input type="checkbox"/>	
Item	Date Field	Date	<input type="checkbox"/>	<input type="checkbox"/>	
Item	Decimal	Decimal	<input type="checkbox"/>	<input type="checkbox"/>	
Sales Header	Customer Request	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Sales Header	Date of Comment	Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sales Header	Decimal	Decimal	<input type="checkbox"/>	<input type="checkbox"/>	
Purchase Header	Text Field	Text	<input type="checkbox"/>	<input type="checkbox"/>	

2. There are 2 customer fields with the same type available, click on the row and ok to save (or the customer entity on the row)



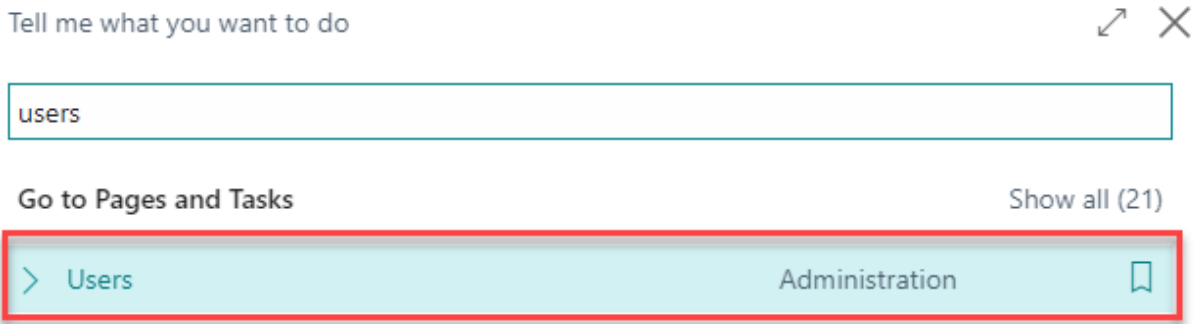
3. The default from column will update with the name of the field chosen

4. SECURITY

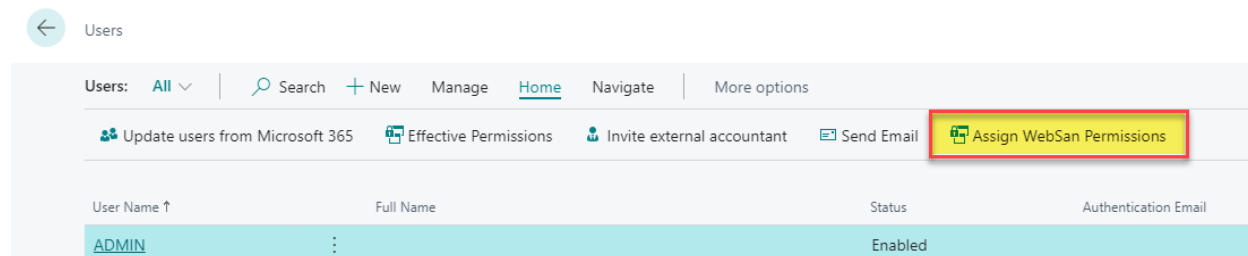
The application, along with the rest of WebSan Inc.'s Dynamics 365 apps, have a built-in Auto Permission security functionality. When a user with the proper credentials installs an App, the Auto Permission function automatically triggers and assigns or updates the user's permissions. No other action is needed from the user.

When a user without the proper credentials installs an App, the Auto Permission function allows the installation, but user permissions are not changed. In this case, a user with the proper security credentials can change the user's permissions later.

To change user permissions, search and go to the User list.



In the Users window, select Assign WebSan Permissions to assign all users the WebSan Permission Set.



5. REGISTRATION

To register a WebSan Inc.'s application, in Business Central, search WebSan Client Information and select WebSan Client Information – Administration.

Tell me what you want to do ↗ ✕

Go to Pages and Tasks

> WebSan Client Information Administration 🔖

In the WebSan Client Information window, enter your company's contact and billing information. After your information is complete, select Transmit Data.

📝 🔗 + 🗑️ ✓ Saved 🔖 🔄 ↗

WebSan Client Information

📡 Transmit Data

General

MS Client ID On Hold

Active

Contact Information

Company *	PostalCode / ZipCode *
Name *	Country *
Address *	Phone
Address2	Email
City *	Email CC
Province / State *	Billing is Same as Co... <input checked="" type="checkbox"/>