

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Easy Customise

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2 Getting Started

SD Easy Customise allows users to create custom fields on tables; place custom or existing fields onto pages and reports; and easily create API pages that expose tables to be read from and written to; all from within your Microsoft Dynamics 365 Business Central environment without the need to write code.

With SD Easy Customise you can add your own custom code directly to table, page, and report triggers. You can also add your own custom trigger code to new table fields, and to new and existing page fields without involving a developer. You can modify properties on all new and existing table and page fields including updating ToolTips, making a field mandatory, changing captions, setting a field as mandatory and changing the field style again without involving a developer.

SD Easy Customise is intended for use by experienced Microsoft Dynamics 365 Business Central users that have a knowledge of object structures and some experience with the AL language.

SD Easy Customise creates an extension app that contains all your changes and is designed to be used in a Sandbox environment where, following best practice, users make changes to the objects and then test their changes. Once changes have been tested, users can then download the extension app from their Sandbox environment and deploy the extension app to their live Production environment.

If you choose the Free 30-Day Trial licence, you can create the extension app from SD Easy Customise in your Sandbox environment, but you cannot download the created extension app to deploy to your Production environment nor can you commit your changes to GitHub or DevOps.

If you receive a subscription licence from Simply Dynamics Ltd, you can download the created extension app to deploy to your Production environment and you can also commit your changes to GitHub or DevOps.





3 Installing SD Easy Customise

SD Easy Customise, is available to download from AppSource or you can install the app from within Business Central using Extension Marketplace.

As mentioned above, SD Easy Customise can be used only in Sandbox environments where it creates an extension app that contains all your object changes and, following best practice, where users test their changes before deploying to the Production environment. Once changes have been tested, users can then deploy the extension app created by SD Easy Customise to the live Production environment.

3.1 Allowing HttpClient Requests in SD Easy Customise

Switching on the **Allow HttpClient Requests** option allows SD Easy Customise to call an API that sends and returns licence key information to activate the product. The **Allow HttpClient Requests** option is automatically enabled on install of SD Easy Customise.

- 1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management**.
- 2. In the Extension Management list, you should see the SD Easy Customise App installed (*Figure 3-1*).

| 🔎 Search 💽 Analyse M | Manage More options | | | B |
|------------------------------|---------------------|---------------------|-----------------|-------------|
| | | | | |
| Name J | Publisher | Version | ls Installed | Published A |
| SD Easy Customise | Simply Dynamics Ltd | v. 2.0.0.0 | 2 | Global |
| Sales and Inventory Forecast | Microsoft | v. 23.0.12034.13077 | 2 | Global |

Figure 3-1





3. Select the **SD Easy Customise** App record and from the menu, select the **Manage** group, and choose **View** (*Figure 3-2*).

| 🔎 Search 	 💽 Analys | e <u>Manage</u> More op | tions | | | | |
|-----------------------|-------------------------|---------------------|------------------------------|-------------|----------|-----|
| Extension Marketplace | 🕒 Upload Extension | Installation Status | ତ View 😤 Install 🔹 Uninstall | 🖹 Unpublish | 🃭 Set up | |
| Name ↓ | | Publisher | Version | | ls Insta | led |
| SD Easy Customise | : | Simply Dynamics Ltd | v. 2.0.0.0 | | | |

Figure 3-2

4. The Allow HttpClient Requests option has been switched on (Figure 3-3).

| Extension Settings | | Ċ | + | Ē | , | ✓ Saved | c 2 |
|--------------------|----------------|---|-----------|---|--------------|---------|-----|
| SD Easy C | lustomise | | | | | | |
| Group | | | | | | | |
| | | | | | | | |
| App ID | f9c97e46-7b25- | | Publisher | | Simply Dynam | ics Ltd | |

Figure 3-3





3.2 Choosing the SD Easy Customise Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (*Figure 3-4*).

| | | | | | | | Ģ | Ô | ? | |
|---|-----------------|----------------------|---------|---------|-------|----------------|--------|---|---|------|
| Inventory ∨ Posted Documents ∨ Setup & Exte | nsions 🗸 🛛 🔳 | | | | | Personalise | | | | |
| Sales Journals Cash Receipt Journals Transfer O | rders | | | | | Design | | | | _ |
| | | | | | | My Settings | | | | |
| | ACTIONS | | | | | Company infor | mation | | | |
| | | | | > Sales | > His | Assisted setup | | | | - 18 |
| | + Sales Invoice | + Sales Return Order | > Tasks | Reports | | | | | | |

Figure 3-4

2. In the My Settings page, on the Role field, select the AssistEdit icon (Figure 3-5).

| Role Sales Order Processor ··· Company CRONUS International Ltd. ··· Work Date 23/10/2023 Image: Calibration of the second secon |
|---|
| Work Date 23/10/2023 Region English (United Kingdom) Language English (United Kingdom) |
| Region English (United Kingdom) ··· Language English (United Kingdom) ··· |
| Language · · · · · English (United Kingdom) |
| |
| Time Zone · · · · · · · · · · · · · · · · · · · |
| |
| Notifications Change when I receive notifications. |
| Teaching Tips |

Figure 3-5

3. You should see **SD Easy Customise** in the list of Roles (*Figure 3-6*).

| | 2 × |
|---|-------|
| | |
| : | |
| | · III |
| | |







- 4. Choose SD Easy Customise and click OK.
- 5. The **SD Easy Customise** Role should now be displayed in the **Role** field (*Figure 3-7*).

| Work Date 23/10/2023 Region English (United Kingdom) anguage English (United Kingdom) | •••• |
|---|------|
| Work Date 23/10/2023 Region English (United Kingdom) Language English (United Kingdom) | |
| Region English (United Kingdom) Language English (United Kingdom) | |
| Language English (United Kingdom) | |
| | |
| Time Zone · · · · · · · · · · · · · · · · · (UTC+00:00) Dublin, Edinburgh, Lisbon, L | |
| | |
| Notifications · · · · · · · · · · · Change when I receive notifications. | |
| Teaching Tips | |

Figure 3-7

3.3 Accessing the SD Easy Customise Pages

Use the **Tell Me** to search for SD Easy Customise pages. Begin typing **SD** or **Easy** to see a list of the SD Easy Customise pages (*Figure 3-8*).

| sd easy | |
|---------------------------|----------------|
| Go to Pages and Tasks | Show all (10) |
| > SD Easy Customise | Tasks |
| > SD Easy Customise Pages | Lists |
| > SD Easy Customise Setup | Administration |

Figure 3-8





3.4 Activating the SD Easy Customise Licence

To use SD Easy Customise, you must activate the licence.

1. From the **Tell Me**, search for and select the **SD Easy Customise Setup** card. When the **SD Easy Customise Setup** card first opens, you will be prompted that "Your license is invalid." Choose **OK** (*Figure 3-9*).

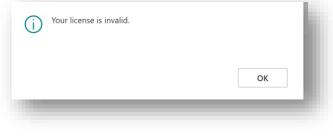
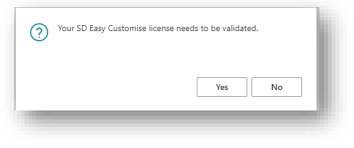


Figure 3-9

2. You are then prompted that "Your SD Easy Customise license needs to be validated." Choose **Yes** (*Figure 3-10*).





3. You will then see the Activate Your Product page.





3.4.1 Activating the SD Easy Customise Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free 30 day trial:

1. In the Activate Your Product page (Figure 3-11)

Enter your company name in Company Name.

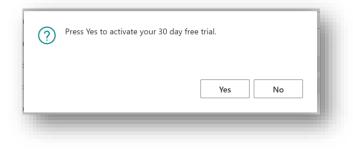
Enter your company email in Email.

Choose Free Trial.

| | - | | | |
|---|--------------------|---|------------|---|
| Dynamics Shop | | | | Î |
| | | | | 1 |
| Company Name | * | | | 1 |
| Email · · · · · · · · · · · · | * | | | |
| Product Key | | | | |
| Valid · · · · · · · · · · · · · · · · · · · | | | | |
| License Type | | | | |
| Expiry Date | | | | |
| | act Simply Dynamic | pired and the product is for a new Product K | | Ŧ |
| | Free Trial | Request Subscriptio | n Activate | |
| | | | | |

Figure 3-11

2. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** (*Figure 3-12*).









3. The **Activate your product page** will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free 30 day trial (*Figure 3-13*).

| Dynamics | | | |
|--|------------|----------------------|----------|
| Shop | | | |
| | | | |
| Company Name | | | |
| Email · · · · · · · · · · · · · · · | | | |
| Product Key | | | |
| Valid · · · · · · · · · · · · · · · · · · · | •••••• | | |
| License Type | trial | | |
| Expiry Date | 22/11/2 | 023 | |
| Activation successful! Customise! Your license expires o | | SAAS-SIMP-SDEASY | SD Easy |
| | Free Trial | Request Subscription | Activate |
| | | | |

Figure 3-13

- 4. Choose Finish to exit the page.
- 5. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.





3.4.2 Activating the SD Easy Customise Licence with a Product Key

Take the following steps if you have received a Product Key from Simply Dynamics Ltd.:

1. In the Activate Your Product page (Figure 3-14)

Enter your company name in Company Name.

Enter your company email in Email.

Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key**. Choose **Activate**.

| Shop | | | - |
|--|-------------------------|--------------------|----------|
| Company Name | | _ | |
| Email · · · · · · · · · · · · | | | |
| Product Key | | | |
| Valid · · · · · · · · · · · · · · · · · · · | | | |
| License Type | | | |
| Expiry Date | 22/11/2023 | | |
| Activation successful! Customise! Your license expires o | Thank you for using SAA | S-SIMP-SDEASY - SD | Easy |
| four neense expires o | | st Subscription | Activate |
| | Free man | st subscription | Activate |



- 4. The **Activate Your Product** page will update to display a message that the activation was successful. The expiry date will depend on the details of your subscription with Simply Dynamics Ltd.
- 5. Choose **Finish** to exit the page.





3.5 Downloading Symbol Files

The **SD Easy Customise Setup** can be accessed from the **SD Easy Customise Role Centre**, by selecting the **Setup** action cue (*Figure 3-15*), or by searching for **SD Easy Customise Setup** in the **Tell Me**.

| CRONUS | nternational L | .td. All Repor | ts 📃 🚍 | | |
|---------------|------------------|------------------|-----------|---------------|----------|
| SD Easy Cu | stomise Activiti | tes | | | |
| SD Easy Custo | mise - Objects | | | | |
| Tables | Pages | Reports | API Pages | Code Triggers | Setup |
| 0 | 0 | 0 | 0 | 0 | 1 |
| > | — <u> </u> | | | | <u> </u> |

Figure 3-15

When you first open the **SD Easy Customise Setup**, you will be prompted to update your symbol files. Symbols are references to the objects, properties, and functions in your Microsoft Dynamics 365 Business Central environment. SD Easy Customise uses the updated symbol files to build an index of the tables, pages, and reports in your system. Choose **Yes** *(Figure 3-16)*.

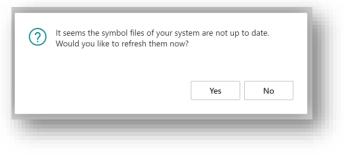


Figure 3-16





The following page is displayed. Choose the **Copy code and open page** action (*Figure 3-17*).

| Authentication Required | 2 × |
|---|-----|
| In order to use SD Easy Customise, you need to download Microsoft containing detailed information about the obje | |
| To authenticate with Microsoft, please click the link below provided or select the "Copy code and open page" action please close the page to initiate the download. | - |
| | - 1 |
| | |
| https://microsoft.com/devicelogin | |

Figure 3-17

A new tab is opened in your browser. The URL will bring you to Microsoft online to download the symbol files for your environment (*Figure 3-18*).

| Enter code | |
|-------------------------|--------------------------|
| Enter the code displaye | d on your app or device. |
| Code | |
| | Next |
| | |



Choose **CTRL+V** to paste the code that you have copied from the previous step. Then choose **Next** (*Figure 3-19*).

| Microsoft | |
|--------------------------|------------------------|
| Enter code | |
| Enter the code displayed | on your app or device. |
| | Next |
| | |
| - | |
| | |







To download the symbols from Microsoft, you will need to pick an account with which to sign into Dynamics 365 Developer. Once you have successfully signed in, you will see this page. Close this window (*Figure 3-20*).



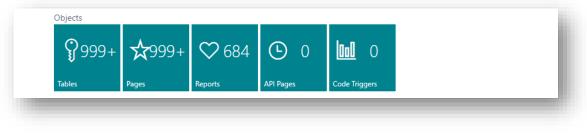
Figure 3-20

Back in your Dynamics 365 Business Central window you will see a message displaying the progress of the symbols download (*Figure 3-21*).

| Working on it | × |
|------------------------------|---|
| Building Object Metadata 17% | |
| | |
| | |
| | |

Figure 3-21

Once you have updated your symbols, the action cues in the **Objects** group are populated with a count of all the tables, pages, and reports that you have in your environment including extensions published as Global, PTE, and Dev (*Figure 3-22*).





Once the symbols have downloaded, you are ready to begin adding new custom fields to tables and placing new or existing fields onto pages or reports, all from within **SD Easy Customise** without the need to write code.





3.6 Security Setup

We have provided the following permission sets for SD Easy Customise: SDY EC ADMIN (*Figure 3-23*).

| SDY EC ADMIN | SD Easy Customise - Admin | SD Easy Customise |
|--------------|---------------------------|-------------------|
|--------------|---------------------------|-------------------|

Figure 3-23

We have also created an extension on the following standard Microsoft Dynamics 365 Business Central Permission:

• Exten. Mgt. - Admin includes SDY EC ADMIN permissions.





4 Using SD Easy Customise

4.1 SD Easy Customise Setup

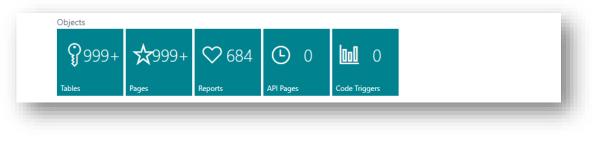
The SD Easy Customise Setup can be accessed from the SD Easy Customise Role Centre, by selecting the Setup action cue (*Figure 4-1*), or by searching for SD Easy Customise Setup in the Tell Me.

| CRONUS | International L | td. All Repor | ts 📃 🚍 | | |
|---------------|-------------------|---------------|-----------|---------------|--------|
| SD Easy Cu | istomise Activiti | tes | | | |
| SD Easy Custo | omise - Objects | | | | |
| Tables | Pages | Reports | API Pages | Code Triggers | Setup |
| 0 | 0 | 0 | 0 | 0 | 1 |
| > | <u>></u> | | | | → → |



When you first open the **SD Easy Customise Setup**, you will be prompted to update your symbol files. Symbols are references to the objects, properties, and functions in your Microsoft Dynamics 365 Business Central environment. SD Easy Customise uses the updated symbol files to build an index of the tables, pages, and reports in your system. See the section above on Downloading Symbol Files.

Once you have updated your symbols, the action cues in the **Objects** group are populated with a count of all the tables, pages, and reports that you have in your environment including extensions published as Global, PTE, and Dev (*Figure 4-2*).





• Tables – Drill through on this cue to open the SD Easy Customise Tables list.





- Pages Drill through on this cue to open the SD Easy Customise Pages list.
- **Reports** Drill through on this cue to open the **SD Easy Customise Reports** list.
- API Pages Drill through on this cue to open the SD Easy Customise API Pages list.
- Code Triggers Drill through on this cue to open the SD Easy Customise Code Triggers list.

The **SD Easy Customise Setup** contains the following fields in the **Extension** FastTab (*Figure 4-3*).

| Extension | | | Show less |
|---|------------------|---------------------------------|-----------|
| App Name | Customisations | Starting Object ID | 80000 |
| Publisher | 1. S. S. | Starting Field No. | 80000 |
| Version · · · · · · · · · · · · · · · · · · · | 1.0.0.1 | Field Morphism Code | 80000 |
| Prefix | SDC | Extension Sync Mode | |
| Symbols Last Updated | 20/03/2024 15:08 | Source Control · · · · · · None | |



- App Name Displays the name of the extension app that is created and published with your changes using SD Easy Customise. This defaults to the Company Name followed by Customisations.
- **Publisher** This field defines the publisher's name on the extension app created and published using SD Easy Customise. Defaults to the current Company Name. This field cannot be updated after the extension app is first published.
- Version The initial version of the extension app that is created and published using SD Easy Customise. This value automatically increments by .1 each time the extension app is published.
- **Prefix** The prefix that SD Easy Customise will use. It is advisable not to change this field once you have created your first extension app using **SD Easy Customise**.
- Symbols Last Updated The date and time when the symbols were last updated.





- **Starting Object ID** Specify the starting object ID to use for any new table extension, page extension, or report extension created using SD Easy Customise. Defaults to 80,000.
- **Starting Field No.** Specify the starting field number to use for any extended fields placed on a table, page, or report using SD Easy Customise. Defaults to 80,000.
- Extension Sync Mode Select from either Add or Force. Choosing Add means that
 when removing extended fields from a table you will need to set the field as obsolete
 to remove the field from your extension. You can set a field as obsolete by choosing
 the Set As Obsolete action in the Table card. If you chose Force, you will be able to
 delete an extended field from a table by choosing the Delete Line action in the Table
 card or the Remove Extension action in the SD Easy Customise Tables list. If you
 delete an extended field from a table any data in that field will be irretrievably lost.
- Source Control Options are None, GitHub, or DevOps. Choosing GitHub or DevOps allows you to commit your extension changes up to GitHub or DevOps using the Commit Changes action.

The **GitHub API Settings** FastTab is displayed if you have selected **GitHub** for the **Source Control** option (*Figure 4-4*).

| ccount Name | Branch main |
|-------------|-------------|
| epository | Token |
| | |



- Account Name Enter the name of your GitHub account.
- **Repository** The name of your GitHub repository where you will commit the extension changes that you make using SD Easy Customise.
- **Branch** Specify the branch in your repository on GitHub where you will commit your changes.
- **Token** Enter your GitHub token.





The **DevOps API Settings** FastTab is displayed if you have selected **DevOps** for the **Source Control** option (*Figure 4-5*).

| rganization · · · · · · | Reposi | itory | |
|-------------------------|--------|-----------------|--|
| oject | Person | al Access Token | |



- **Organization** Enter the name of your DevOps organization.
- **Project** The name of your DevOps project.
- **Repository** The name of your DevOps repository where you will commit the extension changes that you make using SD Easy Customise.
- **Personal Access Token** Enter your DevOps personal access token.

The System Information FastTab displays the following fields (Figure 4-6).

| nvironment Name | | Environment Type Sandbox | |
|-----------------|------|--------------------------|----|
| atform | SaaS | Base App Version | 22 |
| | | | |



- Environment Name The name of the environment where the SD Easy Customise App is installed.
- **Environment Type** The type of environment where the SD Easy Customise App is installed. SD Easy Customise is designed to be installed in a Sandbox environment only.
- **Platform** The platform where the SD Easy Customise extension app is installed. SaaS or On Prem.
- **Base App Version** The version of the Microsoft Dynamics 365 Business Central base app in the environment where SD Object Builder App is installed.





The SD Easy Customise Setup contains the following actions in the Related menu group (*Figure 4-7*).

| ÷ | (| 🖉 🖻 + 🛍 |
|-------------------------|--------------------------------------|------------------------|
| SD Easy (| Customise | Setup |
| Home About <u>Relat</u> | ed More options | |
| | ↓ Download Package | 💣 Extension Management |
| | Download Fackage | * Extension management |



• **Update Symbols** – Choosing this action updates the symbols in your environment. Follow the steps outlined above in the section Downloading Symbol Files.

Once the symbols have downloaded, you are ready to begin adding new custom fields to tables and placing new or existing fields onto pages or reports, all from within **SD Easy Customise** without the need to write code.

• **Publish App** – This action creates and publishes the extension app that contains the changes you have made when, for example, you add new custom fields to a table and place new or existing fields onto a page or report.

SD Easy Customise creates an extension app that contains all your changes and is designed to be used in a Sandbox environment where, following best practice, users make changes to the objects and then test their changes. Once changes have been tested, users can then deploy the extension app to their live Production environment.

| UI Extension installation is in progress. Please check the Extension Installation Status page for updates. | Bynamics Shop | |
|---|---------------------------------------|--|
| | Installation Status page for updates. | |
| Duration · · · · · · · · · · · · · · · · · · · | | |

Choose **OK** to begin installing your extension (Figure 4-8).







- **Download Package** Choose this action to download the extension app that you have created in SD Easy Customise. This extension app can be deployed to your live Production environment when testing is complete.
- **Commit Changes** Commits your changes to your GitHub or DevOps repository.
- Extension Management Opens the standard Microsoft Dynamics 365 Business Central Installed Extensions list.
- **Extension Deployment Status** Opens the standard Microsoft Dynamics 365 Business Central Extension Installation Status list.





4.2 SD Easy Customise – Adding Fields to Tables

As mentioned above, to begin using **SD Easy Customise**, you need to update your symbols. When the symbols have downloaded, you are ready to begin adding new fields to tables.

Open the SD Easy Customise Tables list, accessed from the SD Easy Customise Setup, the SD Easy Customise Role Centre or by searching the Tell Me (*Figure 4-9*).

| ✓ Search | | Analyse Manage | ✓ Extend 📍 | Extended Only | X Remove Extensi | on … | ¢ 7 | = |
|------------|---|----------------------|------------|---------------|------------------|---------------------|------------------|---|
| Table No.↑ | | Table Name | Extended | Placed Fields | Pending Fields | Published Fields | Modified At | I |
| <u>3</u> | ÷ | Payment Terms | | 0 | 0 | 0 | 23/10/2023 10:57 | |
| 4 | | Currency | | 0 | 0 | 0 | 23/10/2023 10:57 | |
| 5 | | Finance Charge Terms | | 0 | 0 | 0 | 23/10/2023 10:57 | |
| 6 | | Customer Price Group | | 0 | 0 | 0 | 23/10/2023 10:57 | |
| 7 | | Standard Text | | 0 | 0 | 0 | 23/10/2023 10:57 | |
| 8 | | Language | | 0 | 0 | 0 | 23/10/2023 10:56 | |
| 9 | | Country/Region | V | 1 | 0 | 1 | 17/10/2023 15:03 | |
| 10 | | Shipment Method | | 0 | 0 | 0 | 23/10/2023 10:57 | |



Choose the table you want to add a new field to and select Extend (Figure 4-10).

| ✓ Search | | Analyse | Manage | ✓ Extend ▼ | Extended Only | × Remove Extension | ı | ¢ 7 | ≡ |
|------------|-----|------------|--------|-------------------|---------------|--------------------|---------------------|------------------|----|
| Table No.↑ | | Table Name | | Extended | Placed Fields | Pending Fields | Published Fields | Modified At | Mc |
| 17 | | G/L Entry | | | 0 | 0 | 0 | 23/10/2023 10:57 | |
| <u>18</u> | - 1 | Customer | | | 0 | 0 | 0 | 23/10/2023 10:57 | |

Figure 4-10

The SD Easy Customise Table card for the selected table opens. To add a field to the table,





choose the **New** action (Figure 4-11).

| Ger | neral | | | | | | | | | | |
|-------|--------------------------------|---------------------------|----------------------|----------------------|------------------|----------------|---------------------|-----------------------|---|-----------------|-----|
| Table | e No. · · · · · · · · · · · · | | | | | 1 | 8 | Table Extension ID | | | |
| Table | e Name | | Customer | | | | | Additional Properties | 5 · · · · · · · · · · · · · · · · · · · | No | > |
| Capt | tion · · · · · · · · · · · · · | | | | | | | Trigger Content · · · | | No | > |
| | | | | | | | | | | | |
| Field | ds 🛛 🕞 Set Status | To Pending 🛛 🗳 Set Status | io New 🚏 Field Morph | isms 🗸 Place S | elected To Pages | ✓ Place Se | lected [·] | To Reports 🗙 Set As | s Obsolete 🖉 Edit | 🔿 View 🎽 N | lew |
| | Field No.↑ | Field Name | | Deployment Status | Field Type | Field Class | | Obsolete State | Field Morphisms | Placed on Pages | F |
| | | | | | | (There is not) | aing to r | show in this view) | | | |

Figure 4-11

In the **Table Field** card, if you are adding a field with a **Field Class** of **Normal**, you can set the following values for the field that you are adding to the table (*Figure 4-12*).

| ndustry Sector | | | |
|---|--------|---------------------------------------|--------|
| Set Status To Pending 🚳 Set Status To New 🛛 X Set As Obsolete | Autor | mate \checkmark Fewer options | |
| ieneral | | | |
| able No. · · · · · · · · · · · · · · · · · · · | 18 | Field Caption | |
| ble Name · · · · · · · · Customer | | Deployment Status · · · · · · · · New | |
| eld Class · · · · · · · Normal | \sim | Extended Data Type | \sim |
| eld Type | \sim | ToolTip | |
| ield No | | Multiline | |
| ield Name Industry Sector | | Field Length | 30 |



- **Table No.** Displays the table no. of the table that you are adding the new field to.
- Table Name Displays the name of the table that you are adding the field to.
- Field Class Choose from a field class of Normal, FlowField or FlowFilter. Depending on the chosen Field Class, different fields will display in the Table Field card.
- Field Type Choose the type of field you are creating. Depending on the chosen Field Type different fields will display in the **General** FastTab.





- Field No. The field number for the new field.
- Field Name Enter a name for the field.
- Field Caption Enter a caption for the field.
- **Deployment Status** Displays the status of the field. Options are **New**, **Pending**, or **Published**. Deployment Status is set to Published once the fields have been added by publishing the extension app and the symbols have been updated.
- **ToolTip** Enter a ToolTip for the field.
- **Option Members** Displayed if you chose a **Field Type** of **Option**. Enter the values for your option field.

If you are adding numbers to the Option Members field, the values must be enclosed in double quotes e.g., "0","1","2","3" etc. (*Figure 4-13*).

| Set Status To Pending Set Status To New X Set | As Obsolete More of | options |
|---|---------------------|-------------------|
| General | | |
| able No. | 23 | Field Caption |
| Table Name · · · · · · · · · · · · Vendor | | Deployment Status |
| ield Class | \sim | ToolTip |
| | | |



If you are adding text to the Option Members field and want to leave the first option blank leave a blank space at the beginning of the field e.g. ,Low,Medium,High (*Figure 4-14*).

| Set Status To Pending 🚳 Se | t Status To New 🗙 Set As | Obsolete More o | ptions |
|----------------------------|--------------------------|-----------------|---|
| General | | | |
| Table No. | | 23 | Field Caption |
| Table Name | Vendor | | Deployment Status · · · · · · · · New |
| Field Class | Normal | \sim | ToolTip · · · · · · · · · · · |
| Field Type | Option | \sim | Option Members · · · · · · · · / ,Low,Medium,High |







- Extended Data Type Displays if you chose a Field Type of Text.
- Multiline Displays if you chose a Field Type of Text.
- Field Length Displays if you choose a Field Type of Code or Text.

In the **Table Field** card, if you are adding a field with a **Field Class** of **Flow Field**, you can set the following values for the FlowField that you are adding to the table (*Figure 4-15*).

| Set Status To Pending | 🖇 Set Status To New 🛛 🗙 Set As 🕻 | Obsolete | More options | |
|---|----------------------------------|----------|----------------------------|--------------------------------------|
| General | | | | |
| Table No. · · · · · · · · · · · · · · · · · · · | | 27 | Field Caption | Qty. on Posted Sales Invoice |
| Table Name | Item | | Deployment Status | Published |
| Field Class | FlowField | \sim | ToolTip | Specifies how many units are on Post |
| Field Type | Decimal | \sim | | |
| Field No. | 50000 | 0 | | |
| Field Name | Qty on Pstd Sales Invoice | | | |
| FlowField Options | | | | |
| FlowField Method | sum | | FlowField Field No. | 15 |
| | 1 | 13 🗸 | FlowField Field Name | Quantity |
| FlowField Table No. | | | Elever Field Field Leverth | |
| FlowField Table No. · · · · · · · · · · · · · · · · · · · | Sales Invoice Line | | FlowField Field Length | |

Figure 4-15

You can also add filters to the FlowField (Figure 4-16).

| FlowField D | rillDown Page. | Posted Sales In | nvoice Subform | | | |
|-------------|----------------|--|----------------|------------------------|-------------|------------------|
| | | | | | | |
| | | | | | | |
| | d Filtore | <table-of-contents> 👬 New Line 🛛 🕅 🕅</table-of-contents> | Doloto Lino | | | Ŕ |
| FlowFiel | d Filters | - New Line - L | Delete Lille | | | |
| FlowFiel | a Filters | | | | | |
| | ield No. 1 | FlowField Field | Filter Type | Filter Value | Value Field | Value Field Name |
| | | FlowField Field Name | | Filter Value "Item" | Value Field | Value Field Name |
| Filter F | ield No. † | FlowField Field Name | Filter Type | | C | Value Field Name |





For published FlowField fields, users can modify the FlowField Filters, even if the field is published, by choosing the **Refresh CalcFormula** action in the **FlowField Filters** FastTab (*Figure 4-17*).

| owField Filters 📑 [#] New Line | e 🦮 Delete Line 🧭 | Refresh Calcformula | |
|---|-------------------|---------------------|--|
| | | | |

Figure 4-17

SD Easy Customise automatically calculates FlowFields when placed on a page or report.

| General | 🖇 Set Status To New 🛛 🗙 Set As Obse | olete | More options | | |
|---|---|--------|----------------------|------------------------------|-----|
| Table No. | | 27 | Field Caption | Def. VAT Prod. Post. Grp | |
| Table Name | Item | | Deployment Status | Published | |
| Field Class | FlowField | \sim | ToolTip | Def. VAT Prod. Post. Grp | |
| Field Type | Code | ~ | Field Length | | |
| Field No. | 50002 | | | | |
| | | | | | |
| Field Name FlowField Options | Def. VAT Prod. Post. Grp | | | | |
| | | ~ | FlowField Field No. | 3 | 3. |
| FlowField Options | | ~ | FlowField Field No. | Def. VAT Prod. Posting Group | 3 |
| FlowField Options | lookup 251 | > | | | |
| FlowField Options FlowField Method FlowField Table No. | lookup 251 | | FlowField Field Name | Def. VAT Prod. Posting Group | |
| FlowField Options FlowField Method FlowField Table No. FlowField Table Name | lookup 251 Gen. Product Posting Group | | FlowField Field Name | Def. VAT Prod. Posting Group | 3 . |

Below is an example of how to create a Lookup FlowField (*Figure 4-18*).

Figure 4-18





In the **Table Field** card, if you are adding a field with a **Field Class** of **Flow Filter**, you can set the following values for the field that you are adding to the table (*Figure 4-19*).

| Date Filter | | | |
|---------------------------|---------------------------------------|-------------------|-------------|
| 🕃 Set Status To Pending 💰 | Set Status To New 🛛 🗙 Set As Obsolete | More options | |
| General | | | |
| Table No. | 27 | Field Caption | Date Filter |
| Table Name | Item | Deployment Status | New |
| Field Class | FlowFilter 🗸 🗸 | ToolTip | |
| Field Type | Date 🗸 | | |
| Field No. | 50003 | | |
| Field Name | Date Filter | | |

Figure 4-19

When you have entered the details for the new field, select the **Set Status To Pending** action which updates the **Deployment Status** to **Pending** (*Figure 4-20*).

| Industry Sector | | | | |
|---------------------------|---------------------------------|--------|---|--------------------------------------|
| Set Status To Pending Set | Status To New 🗙 Set As Obsolete | Automa | te \lor Fewer options | |
| General | | | | |
| Table No. | | 18 | Field Caption | |
| Table Name | Customer | | Deployment Status | New |
| Field Class | Normal | \sim | Extended Data Type | None |
| Field Type | Text | \sim | ToolTip · · · · · · · · · · · · · · · · · · · | Enter the Customer's Industry Sector |
| Field No. | 50000 | | Multiline · · · · · · · · · · · · · · · · · · · | |
| Field Name | Industry Sector | | Field Length | 3 |
| | | | | |
| Additional | | | | |
| Modified At | 31/08/2023 12:40 | | Modified By | |

Figure 4-20

Exit the Table Field card, returning to the Table card.





From the **Table** card, you can set **Additional Properties** and **Trigger Content** both at table level and at field level. Drill through on the **Additional Properties** and **Trigger Content** fields to set properties or create trigger content. It is recommended that users have at least some knowledge of the AL language before adding trigger code or setting additional properties (*Figure 4-21*).

| 23 | | | |
|---|----|--------------------------------|-------|
| General | | | |
| Table No. | 23 | Table Extension ID | 50003 |
| Table Name •••••••••••••••••••••••••••••••••••• | | Additional Properties ••••• No | |
| Caption · · · · · · · · · | | Trigger Content · · · · · No | |

Figure 4-21

In the **Table** card you can also morph fields that you have created on the table to other tables that are related to the current table (*Figure 4-22*). **Field Morphism** is discussed in detail in a separate section.

| General | | | | | |
|---|--------|----|-----------------------|----|-------|
| Table No. | | 23 | Table Extension ID | | 50003 |
| Table Name | Vendor | | Additional Properties | No | |
| Caption · · · · · · · · · · · · · · · · · · · | | | Trigger Content | No | |
| | | | | | |

Figure 4-22

You can now place the newly created fields on to pages and/or reports.

The **Remove Extension** action on the SD Easy Customise Tables list (*Figure 4-23*) deletes the field that was created for the table. When a field is deleted, it is also removed from all pages/reports it has been placed to and all data stored in the field will be irretrievably lost.





To delete a field, the **Extension Sync Mode** on the **SD Easy Customise Setup** must be set to **Force**.

| SD Easy (| Customise Table | is | | | | | |
|-----------|-----------------|----------|---------|-------------|------------------------|--------------------|--------------|
| ,∕⊃ Sear | rch 💽 Ai | nalyse | Manage | ✓ Extend | T Extended Only | × Remove Extension | More options |
| | Table No | o. ↑ | Tab | le Name | | Exte | nded |
| | | <u>3</u> | : Pay | yment Terms | | | |
| | | 4 | <u></u> | rropcy | | | |

Figure 4-23





4.3 SD Easy Customise – Placing Fields on Pages

You can place newly created fields on to pages from either the **SD Easy Customise Table** card or from the **SD Easy Customise Page** card.

4.3.1 Placing Fields on Pages from the SD Easy Customise Table Card

In this example we will use the **SD Easy Customise Table** card.

Open the **SD Easy Customise Tables** list, accessed from the **SD Easy Customise Setup** or by searching the **Tell Me**.

Select the field, or fields, that you want to place on the page and choose the **Place Selected To Pages** action (*Figure 4-24*).

| 18 | | | | | | | | | | |
|---------|---|------------------------------|----------------------|-------------|------------------------------------|----------|------------|-----------------------|-------------------|-------------------|
| Gene | ral | | | | | | | | | |
| Table N | Vo. · · · · · · · · · · · · · · · · · · · | | | | | 18 | Table Exte | ension ID · · · · · · | | |
| Table N | Vame · · · · · · · | Cus | tomer | | | | Additiona | I Properties | | No |
| Caption | n | | | | | | Trigger Co | ontent · · · · · · | | No |
| | | | | | | | | | | |
| Field | ds 🛛 🖓 Set Sta | itus To Pending 🛛 💣 Set Stat | us To New 📲 Fiel | d Morphisms | Place Selected | To Pages | ✓ Place S | elected To Reports | 🗙 Set As Obsolet | e 🥖 Edit 💿 |
| | Field No. † | Field Name | Deployment Status | Field Type | Field Class | Obsolet | e State | Field Morphisms | Placed on Pages ∽ | Placed on Reports |
| | 50000 | Industry Sector | Pending | Text | Normal | No | | 0 | 0 | c |

Figure 4-24





The **Easy Customise Pages** list opens. In our example, as we are in the Table card for the Customer table, pages related to the Customer table are displayed in the **Easy Customise Pages** list. Select the record for the Customer Card and choose **OK** (*Figure 4-25*). You can also select multiple pages at once.

| 22 Customer List List 0 31/08/2023 12:23 33 Customer Lookup List 0 31/08/2023 12:23 151 Customer Statistics Card 0 31/08/2023 12:23 155 Customer Sales ListPlus 0 31/08/2023 12:23 302 Customer Entry Statistics Card 0 31/08/2023 12:22 343 Check Credit Limit ConfirmationDialog 0 31/08/2023 12:22 768 Aged Acc. Receivable Chart CardPart 0 31/08/2023 12:22 765 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:22 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | Page No. ↑ | Page Name | Туре | Extended | Placed Fields | Modified At | М |
|---|---|------------|-----------------------------|--------------------|----------|---------------|------------------|----------|
| 33 Customer Lookup List 0 31/08/2023 12:22 151 Customer Statistics Card 0 31/08/2023 12:23 155 Customer Sales ListPlus 0 31/08/2023 12:23 302 Customer Entry Statistics Card 0 31/08/2023 12:22 343 Check Credit Limit ConfirmationDialog 0 31/08/2023 12:22 768 Aged Acc. Receivable Chart CardPart 0 31/08/2023 12:22 768 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:22 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | > | <u>21</u> | Customer Card | Card | | 0 | 31/08/2023 12:23 | ^ |
| 151 Customer Statistics Card 0 31/08/2023 12:23 155 Customer Sales ListPlus 0 31/08/2023 12:23 302 Customer Entry Statistics Card 0 31/08/2023 12:23 302 Customer Entry Statistics Card 0 31/08/2023 12:22 343 Check Credit Limit ConfirmationDialog 0 31/08/2023 12:22 768 Aged Acc. Receivable Chart CardPart 0 31/08/2023 12:22 765 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:22 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart | | 22 | Customer List | List | | 0 | 31/08/2023 12:23 | ÷ |
| 155 Customer Sales ListPlus 0 31/08/2023 12:23 302 Customer Entry Statistics Card 0 31/08/2023 12:22 343 Check Credit Limit ConfirmationDialog 0 31/08/2023 12:22 768 Aged Acc. Receivable Chart CardPart 0 31/08/2023 12:22 768 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:23 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 33 | Customer Lookup | List | | 0 | 31/08/2023 12:22 | : |
| 302 Customer Entry Statistics Card 0 31/08/2023 12:22 343 Check Credit Limit ConfirmationDialog 0 31/08/2023 12:22 768 Aged Acc. Receivable Chart CardPart 0 31/08/2023 12:22 768 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:22 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 151 | Customer Statistics | Card | | 0 | 31/08/2023 12:23 | ÷ |
| 343 Check Credit Limit ConfirmationDialog 0 31/08/2023 12:22 768 Aged Acc. Receivable Chart CardPart 0 31/08/2023 12:23 785 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:22 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 155 | Customer Sales | ListPlus | | 0 | 31/08/2023 12:23 | ÷ |
| 768 Aged Acc. Receivable Chart CardPart 0 31/08/2023 12:23 785 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:23 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 302 | Customer Entry Statistics | Card | | 0 | 31/08/2023 12:22 | : |
| 785 Customer Picture CardPart 0 31/08/2023 12:22 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:23 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 343 | Check Credit Limit | ConfirmationDialog | | 0 | 31/08/2023 12:22 | : |
| 1611 Office Customer Details CardPart 0 31/08/2023 12:22 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:23 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 768 | Aged Acc. Receivable Chart | CardPart | | 0 | 31/08/2023 12:23 | |
| 1870 Credit Limit Notification StandardDialog 0 31/08/2023 12:23 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 785 | Customer Picture | CardPart | | 0 | 31/08/2023 12:22 | |
| 1871 Credit Limit Details CardPart 0 31/08/2023 12:22 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 1611 | Office Customer Details | CardPart | | 0 | 31/08/2023 12:22 | |
| 2101 O365 Customer Activity Page ListPart 0 31/08/2023 12:22 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 1870 | Credit Limit Notification | StandardDialog | | 0 | 31/08/2023 12:23 | |
| 2105 O365 Monthly Customer List ListPart 0 31/08/2023 12:22 | | 1871 | Credit Limit Details | CardPart | | 0 | 31/08/2023 12:22 | |
| | | 2101 | O365 Customer Activity Page | ListPart | | 0 | 31/08/2023 12:22 | |
| 2107 O365 Sales Customer Card Card 0 31/08/2023 12:22 - | | 2105 | O365 Monthly Customer List | ListPart | | 0 | 31/08/2023 12:22 | |
| · · · · · · · · · · · · · · · · · · · | | 2107 | O365 Sales Customer Card | Card | | 0 | 31/08/2023 12:22 | - |
| | | | | | | | | • |

Figure 4-25

The **SD Easy Customise Page Controls** page which shows the structure of the page, opens for the first page selected.

Control records displayed in black are containers or groups. Blue control records are controls that have been placed on pages using the base application or an application that was not created by **SD Easy Customise**. Green control records are controls that have been placed on the page by **SD Easy Customise**. For pages that contain list parts, for example the Sales Order page, the list part will display first in the Page Controls page.



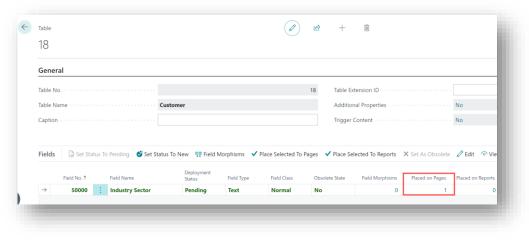


Choose where on the page you want to place the field. Depending on where you want to place the field choose the appropriate action - **Add First**, **Add Last**, **Add Before**, or **Add After** (*Figure 4-26*).

| ⊃ Search 🛧 Add First 🗳 Add Last 秦 Add Before → Add After | | | |
|--|---|-------|-------------|
| ge Name ···· Customer Card | | | Page Type |
| ontrol Name | | Kind | Parent Name |
| content | ÷ | Area | |
| General | | Group | content |
| No. | | Field | General |
| Name | | Field | General |
| Name 2 | | Field | General |
| Search Name | | Field | General |
| IC Partner Code | | Field | General |
| Balance (LCY) | | Field | General |
| BalanceAsVendor | | Field | General |
| Balance Due (LCY) | | Field | General |
| Credit Limit (LCY) | | Field | General |
| Blocked | | Field | General |
| Privacy Blocked | | Field | General |
| Salesperson Code | | Field | General |

Figure 4-26

Back in the **Table** card, the value in the **Placed on Pages** column has been updated. Drill through on the **Placed on Pages** value (*Figure 4-27*).









This opens the **SD Easy Customise Page Fields.** From here you can see the pages where the field has been placed. Select the **View Card** action (*Figure 4-28*).

| ✓ Search | | 🔵 Analyse 🖣 View C | Card More op | otions | | | É | \ ≣ |
|-----------|---|--------------------|--------------|-------------|---------------------|---|----------------|-----------|
| Page No.↑ | | Page Name | Table No. 🕇 | Field No. ↑ | Control Name ↑ | ~ | Change Type | Change An |
| <u>21</u> | ÷ | Customer Card | 18 | 50000 | SDC Industry Sector | | Add After | Name |

Figure 4-28

In the **Page** card you can set additional properties on the field controls that you have added to the card (*Figure 4-29*). You can set the placed field to **Mandatory**, **Hidden**, **Multiline** or **Read Only**. You can also change the **Field Style** and update the **ToolTip**. From the **Page** card you can also add **Additional Properties** or **Trigger Code** to the field placed on the page and at page level. The **Place Table Fields** action in the **Page** card allows you to place existing fields on to a page.

| e 4 | | \bigcirc | | | |
|-------------------------|---------------------|----------------|---------------------------------|-----------|--------|
| 21 | | | | | |
| 📓 Place Table Fields | More options | | | | |
| General | | | | | |
| Page No. | | 21 | Page Extension ID | | 500 |
| Page Name | Customer Card | | Additional Properties · · · · N | lo | |
| Caption · · · · · · · · | | | Trigger Content · · · · · · N | lo | |
| | | | | | |
| Placed Table Fields | 🔁 Delete Line | | | | ¢ |
| Field No. 1 | Control Name↑ | Change Type | Change Anchor | Mandatory | Hidden |
| → <u>50000</u> ; | SDC Industry Sector | Add After | Name | | |

Figure 4-29

You can then publish the extension app from the **SD Easy Customise Setup** card which will create and publish an extension that contains all the changes you have made in SD Easy Customise.





When you have published the app extension, navigate to the **Customer** card. You can see the newly created field is on the page and you can enter a value in the field (*Figure 4-30*).

| 1000 |)0 · Adatum | Corporation | | | | | _ | |
|-----------|----------------------|-----------------------------|-------------------|--|----------------------|----------------|----------------|--------------------|
| 1000 | Auatum | corporation | | | | | | |
| Home | Request Approval Ne | w Document Prices & D | Discounts Custome | r Navigate Report | Actions \checkmark | Related \sim | Reports \lor | Automate \vee Fe |
| 😐 Cor | ntact 📑 Apply Templa | ate 🛛 🔒 Merge With | Send Email | | | | | |
| | | - | | | | | | |
| | | | | | | | | |
| Genera | al | | | | | | | Show less |
| | al | 10000 | | Salesperson Code | | JO | | Show less |
| No. · · · | | 10000 Adatum Corporation | | Salesperson Code Responsibility Cente | | | | |

Figure 4-30





4.3.2 Placing Fields on Pages from the SD Easy Customise Page Card

In this example we will use the **SD Easy Customise Page** card to place fields on to pages. Open the **SD Easy Customise Pages** list, accessed from the **SD Easy Customise Setup**, the **SD Easy Customise Role Centre** or by searching the **Tell Me**.

Select the page that you want to place the newly created field, or existing fields, on and choose the **Extend** action (*Figure 4-31*).

| SD Easy | Cubto | | - ugeo | | | | Σ | |
|---------|-----------|---|-------------------------|----------------------|-------------------|---------------|------------------|---------|
| ,∕⊃ Se | arch | | 🔵 Analyse 🛛 Manage 🗸 | Extend T Exte | nded Only 🗙 Remov | ve Extension | · E | 7 ≣ |
| Page | No. 1 | | Page Name | Туре | Extended | Placed Fields | Modified At | Modifie |
| | 20 | | General Ledger Entries | List | | 0 | 23/10/2023 14:31 | |
| | <u>21</u> | ÷ | Customer Card | Card | | 3 | 23/10/2023 14:31 | |
| | 22 | | Customer List | List | | 0 | 23/10/2023 14:31 | |
| | 23 | | Cust. Invoice Discounts | List | | 0 | 23/10/2023 14:31 | 1.0 |

Figure 4-31

The Page card opens. Choose the Place Table Fields action (Figure 4-32).

| Page | Ø \$ | + 11 | √Saved □ ਤ [⊄] |
|-------------------------------|------|-------------------|-------------------------|
| 21 | | | |
| Reference Fields More options | | | |
| General | | | |
| Page No. | 21 | Caption · · · · · | |
| Page Name ····· Customer Card | | Page Extension ID | 0 |
| | | | |
| Placed Fields ∄≪ Delete Line | | | 6 2 |
| | | | |
| | | | |

Figure 4-32

The **Page Controls** page shows the structure of the page. Control records displayed in black are containers or groups. Blue control records are controls that have been placed on pages using the base application or an application that was not created by **SD Easy Customise**. Green control records are controls that have been placed on the page by **SD Easy Customise**. For





pages that contain list parts, for example the Sales Order page, the list part will display first in the **Page Controls** page.

Using the Add First, Add Last, Add Before or Add After actions in the Page Controls page will open the Fields page (*Figure 4-33*).

| 🔎 Search 🔥 Add First | Add Last 64 | dd Rafa | ra 🛋 Add Aftar | 1 | Ŕ |
|----------------------|---------------|---------|----------------|-------------------------|---|
| Search Add First | Add Last CA | | re 👒 Add After | | |
| | | | | | |
| age Name | Customer Card | | Page | Type · · · · · · · Card | |
| | | | | | |
| | | | | | |
| Control Name | | | Kind | Parent Name | |
| content | | | Area | | |
| <u>General</u> | | ÷ | Group | content | |
| No. | | | Field | General | |
| Name | | | Field | General | |
| SDC Industry Sector | | | Field | Name | |
| SDC Ranking | | | Field | SDC Industry Sector | |
| SDC Classification | | | Field | SDC Ranking | |
| Name 2 | | | Field | General | |

Figure 4-33

In the Fields page, select a field to add to the page and click OK (Figure 4-34).

| ields | | | | | | | | | | | | | | ~ × |
|---------------------------------|--------------|------------------|-------------|--------------------|----------------------|---------|-------------|--------|----------------------------|----------------------|------------------------|---------------|---------------------|----------------|
| ✓ Search | T Obj | ect Builder Only | Show as men | u | | | | | | | | | | ß |
| Table No | a.↑ ▼ | Table Name | Field No. † | Field Name | Field Caption | Туре | Field Class | Length | Object Builder Field | Placed On Page | Placed On Report | Option String | Obsolete State 🝸 | Obsolete Reasc |
| | 18 | Customer | 29 | Salesperson Code | Salesperson Code | Code | Normal | 20 | No | No | No | | No | ^ |
| | 18 | Customer | 30 | Shipment Meth | Shipment Method Code | Code | Normal | 10 | No | No | No | | No | |
| | 18 | Customer | 31 | Shipping Agent | Shipping Agent Code | Code | Normal | 10 | No | No | No | | No | |
| \rightarrow | <u>18</u> | Customer | 32 | Place of Export | Place of Export | Code | Normal | 20 | No | No | No | | No | |
| | 18 | Customer | 33 | Invoice Disc. Code | Invoice Disc. Code | Code | Normal | 20 | No | No | No | | No | |
| | 18 | Customer | 34 | Customer Disc | Customer Disc. Group | Code | Normal | 20 | No | No | No | | No | |
| | 18 | Customer | 35 | Country/Region | Country/Region Code | Code | Normal | 10 | No | No | No | | No | |
| | 18 | Customer | 36 | Collection Meth | Collection Method | Code | Normal | 20 | No | No | No | | No | |
| 1 1 1 1 1 1 1 | 18 | Customer | 37 | Amount | Amount | Decimal | Normal | 0 | No | No | No | | No | |
| | 18 | Customer | 38 | Comment | Comment | Boolean | FlowField | 0 | No | No | No | | No | |
| | 18 | Customer | 39 | Blocked | Blocked | Enum | Normal | 0 | No | No | No | | No | |
| | 18 | Customer | 40 | Invoice Copies | Invoice Copies | Integer | Normal | 0 | No | No | No | | No | |
| | 18 | Customer | 41 | Last Statement | Last Statement No. | Integer | Normal | 0 | No | No | No | | No | |
| | 18 | Customer | 42 | Print Statements | Print Statements | Boolean | Normal | 0 | No | No | No | | No | |
| | 18 | Customer | 45 | Bill-to Customer | Bill-to Customer No. | Code | Normal | 20 | No | No | No | | No | |
| | 18 | Customer | 46 | Priority | Priority | Integer | Normal | 0 | No | No | No | | No | |
| | 10 | Customer | 47 | Daumont Motho | Dowmont Mothod Code | Cada | Normal | 10 | Ma | Min | Ma | | No | |

Figure 4-34





We can see that the selected field, in this example the Place of Export, is now appearing on the **Page Controls** page (*Figure 4-35*). Close the **Page Controls** page.

| Search ↑ Add First ↓ Add Last | | à | 14 |
|---|-------------------|---------------------|----|
| Search Tr Add First Tr Add Last | Add Before Add At | ter | |
| | | | |
| Page Name · · · · · · · · · · Customer Card | 1 | Page Type Card | |
| | | | |
| Control Name | Kind | Parent Name | |
| content | Area | | |
| General | Group | content | |
| No. | Field | General | |
| Name | Field | General | |
| SDC Industry Sector | Field | Name | |
| SDC Ranking | Field | SDC Industry Sector | |
| SDC Classification | Field | SDC Ranking | |
| Place of Export | : Field | SDC Classification | |
| Name 2 | Field | General | |

Figure 4-35

We are now back in the **Page** card for the Customer card and can see that the Place of Export field is now showing in the **Placed Table Fields** list part (*Figure 4-36*).

| Page | | | | Ø B | + 0 | √ Sa | aved 🗖 |
|---------------|-----------------|---------|---------------------|----------------|---------------------------------|-----------|--------|
| 21 | | | | | | | |
| B P | lace Table Fi | elds | More options | | | | |
| Gene | eral | | | | | | |
| Page I | No | | | 21 | Page Extension ID | | 50002 |
| Page I | Name · · · · | | Customer Card | | Additional Properties · · · · N | lo | |
| Captio | n · · · · · · · | | , | | Trigger Content · · · · · N | lo | |
| Place | d Table Fie | lds | € Delete Line | | | | r e |
| | Field No. ↑ | c | Control Name↑ | Change Type | Change Anchor | Mandatory | Hidden |
| \rightarrow | <u>32</u> | - E - F | Place of Export | Add After | SDC Classification | | |
| | 50000 | S | SDC Industry Sector | Add After | Name | | |
| | 50001 | S | SDC Ranking | Add After | SDC Industry Sector | | |
| | | | | | | | |





Having placed the fields, you can then choose to add some extra properties, add some trigger code, or set additional properties, as mentioned in the section above.

You can then publish the extension app from the **SD Easy Customise Setup** card which will create and publish an extension that contains all the changes you have made in SD Easy Customise.

When you have published the app, navigate to the **Customer** card. In the Customer card you can see the newly placed field (*Figure 4-37*).

| 10000 · Adatum Co | rporation | |
|------------------------------|---|-------------------------|
| Home Request Approval New Do | cument Prices & Discounts Customer Report | More options |
| 🖴 Contact 🛛 🗂 Apply Template | 🖓 Merge With 🖃 Send Email | |
| General | | |
| | | |
| | | |
| No | 10000 | Balance (LCY) As Vendor |
| No | | Balance (LCY) As Vendor |
| | Adatum Corporation | |
| Name ····· | Adatum Corporation Corporation | Balance Due (LCY) |
| Name | Adatum Corporation Corporation 2 ~ | Balance Due (LCY) |

Figure 4-37





4.3.3 Placing Expression Fields on Pages from the SD Easy Customise Page Card

From the **Page** card you can also add **Expression Fields** and place to a page. For this example, we will create and place an expression field on to the Sales Order page (*Figure 4-38*).

| | | | (r |) 🖻 | + 1 | | | | √Saved ⊑ |
|---|------------------------------------|--------------------------------------|---------------------------------------|--------|-----------------|-------------|---------|---|----------|
| 42 | | | | | | | | | |
| 📆 Place Table Fields More | options | | | | | | | | |
| General | | | | | | | | | |
| Page No. | | | | 42 | Page Extension | ID | | | 5000 |
| Page Name | Sales Order | r | | | Additional Prop | erties | No | • · · · · · · · · · · · · · · · · · · · | |
| Caption · · · · · · · · · · · · · · · · · · · | | | | | Trigger Content | | No | | |
| | | | | | | | | | |
| Placed Table Fields > | | Edit Expression 📓 Pla | ice To Page | | | | | | é E |
| | Line ≩× Delete Line ∛o I Change | Edit Expression 📾 Pla ange Anchor | ce To Page Expression Data Type | Hidden | Multiline | Field Style | Caption | ▼ ToolTip | ළ ව |
| Expression Fields 관려 New | Line ⅔× Delete Line ⅔D Change | | Expression | Hidden | | | | | |

Figure 4-38

Navigate to the **Expression Fields** list part and enter a name for the control. Then choose the **Edit Expression** action (*Figure 4-39*).

| 42 | | | | | | | | | |
|---------------------------|--------------|-------------------------|-----------------------|--------|-----------------|------------------|---------|---------|-----|
| 42 | | | | | | | | | |
| 🚟 Place Table Fields | More options | | | | | | | | |
| General | | | | | | | | | |
| Page No. | | | | 42 | Page Extension | ID · · · · · · · | | | 500 |
| Page Name | | Sales Order | | | Additional Prop | erties | No | | |
| Caption · · · · · · · · · | | | | | Trigger Content | | No | | |
| Placed Table Fields | | elete Line 🥇 Edit Expre | ssion 翻 Place To Page | | | | | | ĿĊ |
| Control Name 1 | Ci Ty | ange pe Change Ancho | r Data Type | Hidden | Multiline | Field Style | Caption | ToolTip | |
| | ÷. | | Decimal | | | None | * | * | |
| \rightarrow VAT AMOUNT | | | | | | | | | |

Figure 4-39

The **Expression Field** card opens with information and examples of how to create an expression field. Enter your code expression and choose the **Validate Expression** action to





validate the code expression (*Figure 4-40*). The validation of the code expression is limited to a check that the correct number of parentheses are present in the **Code Expression**.

| VAT AMOUNT | <u> </u> | |
|---|--|------|
| | | |
| ↓ Validate Expression ✔ Force Validate Expression More options | | |
| General | | |
| Expression field allows imbedding of AL code expression directly into a field on your selected page. It supports arithmetical operations such as ((Rec."Field 1" - Rec."Field 2") / 2), and some methods of System Data Type that have a supported return data type such as CalcDate() etc. | More information on System Data Type Validated | |
| Requirements & Examples | | |
| Examples are based on table 36, "Sales Header" | | |
| Following returns VAT amount (Decimal) (Rec."Amount Including VAT" - Rec."Amount") | | |
| Follwing returns a date 1 week before Posting Date (Date) | | |
| CalcDate('<-1W>', Rec."Posting Date") | | |
| | | |
| Code Expression | | |
| (Rec."Amount Including VAT" - Rec."Amount") | | |
| | | |
| | | |
| Table Fields | | ් සි |
| Field Name | Туре 🝸 | |
| | Enum | |

Figure 4-40

Back in the **Page** card, choose the **Place To Page** action to place the expression field to the page. In this example we will place the expression field on the Sales Order page (*Figure 4-41*).

| 42 | | | | | | | | | | |
|----------------------------|----------------------|-------------------------|-------------------------|--------|-----------------|--|---------|---------|---|------|
| | | | | | | | | | | |
| Reference Table Fields Mor | e options | | | | | | | | | |
| General | | | | | | | | | | |
| Page No. | | | | 42 | Page Extension | ID | | | 5 | 5000 |
| Page Name | Sales (| Order | | | Additional Prop | erties · · · · · | No | | | |
| Caption | | | | | Trigger Content | | No | | | |
| Placed Table Fields > | w Line 😽 Delete Line | 🏷 Edit Expression 🖳 Pla | ce To Page | | | | | | Ŕ | 6 |
| Expression Fields | | | | | | | | | | |
| Expression Fields 🗦 🖁 Ne | | | | | | and the second s | Caption | ToolTip | | |
| Expression Fields 🗦 🖲 Ne | Change Type | Change Anchor | Expression Data Type | Hidden | Multiline | Field Style | Caption | 10011p | | _ |





Place the expression field on to the page using the Add First, Add Last, Add Before or Add After actions (*Figure 4-42*).

| 🔾 Search 🏠 Add First 🛛 🕹 Add Last 🗧 Add Before 🏾 Ə Add After | | | | Ŀ |
|--|---|-------|-----------------------|---|
| je Name | | | Page Type Document | |
| ontrol Name | | Kind | Parent Name | |
| content | | Area | | A |
| SalesLines | | Part | content | |
| General | ÷ | Group | content | |
| No. | | Field | General | |
| Sell-to Customer No. | | Field | General | |
| Sell-to Customer Name | | Field | General | |
| AOB Classification | | Field | Sell-to Customer Name | |
| AOB Industry Sector | | Field | Sell-to Customer Name | |
| VAT Registration No. | | Field | General | |
| Posting Description | | Field | General | |
| Sell-to Contact | | Field | General | |
| No. of Archived Versions | | Field | General | |
| Document Date | | Field | General | |
| Posting Date | | Field | General | - |
| | | | | |

Figure 4-42

You can then publish the app extension from the **SD Easy Customise Setup** card which will create and publish an extension that contains all the changes you have made in SD Easy Customise.

When you have published the app, navigate to the **Sales Order** page where you can see the expression field has been placed on the page (*Figure 4-43*).

| 101002 · Adatum | Corporation | | | | |
|---|-----------------------------|---------|-----------------------------------|-----------------|---|
| Home Prepare Print/Send | Request Approval Order More | options | | | |
| 🔯 Post 🗸 🕞 Release | Create Warehouse Shipment | 😭 Cre | eate Inventory Put-away/Pick 📲 Ai | rchive Document | |
| General | | | | | Show mor |
| Customer Name | Adatum Corporation | | Due Date | 01/06/2022 | tit in the second se |
| Contact · · · · · · · · · · · · · · · · · · · | Robert Townes | | Requested Delivery Date | 02/05/2022 | Ē |
| Posting Date | 01/05/2022 | | External Document No. | | |
| VAT Date | 01/05/2022 | Ē | Status | Released | |
| Order Date | 01/05/2022 | | Vat Amount | | 370.55 |







4.3.4 Changing the Quick Entry Sequence of fields from the SD Easy Customise Page Card

The entry sequence refers to how the user can navigate through fields on a page by pressing the **Enter** key on the keyboard. The quick entry sequence can be updated as standard through user personalisation but this only updates on a per user basis. The quick entry sequence functionality in SD Easy Customise is applied to all users in the environment.

From the **Page** card you can change the default quick entry sequence of fields on a page. In this example, we will change the standard entry sequence of fields on the **Customer Card** (*Figure 4-44*).

| 🗑 Place Table Fields More options | | |
|---|------------------------------------|-----|
| General | | |
| Page No. | 21 Page Extension ID | 500 |
| Page Name ···· Customer Card | Additional Properties · · · · · No | |
| Caption | Trigger Content No | |
| | | |
| Expression Fields > | | |
| | | فب |
| Expression Fields > Quick Entry Sequence 🛛 🕸 Delete Line 🏕 Add Fields 🏠 Move Up 🗳 Move Down | | Ŕ |
| | | Ŀ |

Figure 4-44

Navigate to the **Quick Entry Sequence** FastTab and chose the **Add Fields** action (*Figure 4-45*).

| uick Entry Sequence 🤅 Delete Line 🍽 Add Fie | lds 🕈 Move Up 🛛 🖞 Move Down | |
|---|-----------------------------|---|
| Control Name | | |
| | | (There is nothing to show in this view) |
| | | |
| | | |





The **Page Controls** list opens with the available controls/fields that can be added to the quick entry sequence. We will choose Name, Salesperson Code, Phone No., and E-Mail. Choose **OK** to close the Page Controls list (*Figure 4-46*).

| 0 | Control Name Privacy Blocked | Kind T Field | Parent Name General | |
|------------|-------------------------------------|------------------------|------------------------|--|
| | Salesperson Code | Field | General | |
| 0 | Responsibility Center | Field | General | |
| 0 | Service Zone Code | Field | General | |
| 0 | Document Sending Profile | Field | General | |
| 0 | TotalSales2 | Field | General | |
| 0 | CustSalesLCY - CustProfit - AdjmtCo | Field | General | |
| 0 | AdjCustProfit | Field | General | |
| 0 | AdjProfitPct | Field | General | |
| 0 | Last Date Modified | Field | General | |
| 0 | Disable Search by Name | Field | General | |
| \bigcirc | Priority | Field | General | |
| 0 | Phone No. | Field | Address & Contact | |
| 0 | MobilePhoneNo | Field | Address & Contact | |
| 0 | E-Mail | Field | Address & Contact | |

Figure 4-46

The controls/fields have been added to the Quick Entry Sequence list part. You can choose the **Move Up** and **Move Down** actions to change the order of the quick entry sequence (*Figure 4-47*).

| k Entry Sequence | 🗙 Delete Line 🛛 👎 Add Fields | ↑ Move Up ↓ Move Down |] | |
|------------------|------------------------------|-----------------------|---|--|
| Control I | ame | | | |
| Name | | | | |
| Salespe | son Code | | | |



We have changed the order of the quick entry sequence in the Customer Card to place focus in the Name field when the Customer Card is opened. Selecting the Enter key will then bring us to the Salesperson Code, then to the Phone No and then to the E-Mail field and selecting Enter again will revert to the default order of sequence for the remaining fields on the Customer Card (*Figure 4-48*).





| | Control Name | |
|---------------|------------------|--|
| \rightarrow | Name | |
| | Salesperson Code | |
| | Phone No. | |
| | E-Mail | |
| | | |

Figure 4-48

Next, publish the app extension from the **SD Easy Customise Setup** card which will create and publish an extension that contains all the changes you have made in SD Easy Customise.

When you have published the app, navigate to the **Customer Card** where you can check the quick entry sequence that you have set up. When you now open the Customer Card, the focus is initially on the Name field. Selecting the Enter key will then bring us to the Salesperson Code, then to the Phone No, then to the E-Mail field and selecting Enter again will revert to the default order of sequence from that point onwards, bringing us to the Fax No. field, and then to the next fields in the default quick entry sequence (*Figure 4-49*).

| 10000 · Adatum Corpora | ations | | |
|--|------------------------------------|--|------|
| | | | |
| Home Request Approval New Document | Prices & Discounts Customer Report | Nore options | |
| 🖴 Contact 🛛 🗂 Apply Template 🛛 👫 Merg | ge With 🖻 Send Email | | |
| General | | | Show |
| | | | _ |
| No | 0 | Privacy Blocked | |
| | 0 ··· | Privacy Blocked 2 Salesperson Code | |
| | um Corporations | | 10 |
| Name Adatu | um Corporations | Salesperson Code Responsibility Center | 10 |
| Name Adatu Classification Medi Ranking 2 | um Corporations | Salesperson Code Responsibility Center | |

Figure 4-49





4.3.5 Associating a new field of type blob with a HTML Editor from the SD Easy Customise Page Card

From the **Page** card you can also associate a blob field with a HTML Editor. This allows you to use a HTML Editor to enter details into the blob field. In this example, we will associate a newly created field on the Item table of type blob, called Additional Item Notes, to the **Item Card** (*Figure 4-50*).

| Place Table Fields More options | | | |
|---|-----------|--------------|--------------------------|
| General | | | |
| Page No. | | 30 | Page Extension ID |
| Page Name | Item Card | | Additional Properties No |
| Caption · · · · · · · · · · · · · · · · · · · | | | Trigger Content No |
| | | | |
| Placed Table Fields > | | | |
| | | | |
| | | | |
| Expression Fields > | | | |
| | | | |
| Quick Entry Sequence > | | | |
| Quick Entry Sequence / | | | |
| | | | |
| | | | |
| HTML Editor | | | |
| | SDC Addit | tonal Item | Notes |
| HTML Editor Content Field | SDC Addit | tonal Item | Notes |
| HTML Editor Content Field | | tonal Item I | Notes |
| HTML Editor HTML Editor Content Field HTML Editor Placed Place Editor to Page Remove Editor from Page | | tonal Item I | Notes |

Figure 4-50

Navigate to the **HTML Editor** FastTab and, from the **HTML Editor Content Field** drop down list, choose the Additional Item Notes field. Then choose the **Place Editor to Page** action *(Figure 4-51)*.

| HTML Editor Content Field | SDC Additor | nal Item Notes | \sim |
|---------------------------|-------------|----------------|--------|
| HTML Editor Placed | | | |
| Place Editor to Page | | | |
| Remove Editor from Page | | | |







The **Page Controls** list opens. Select where you want to place the HTML Editor. In this example we will add it to the last position in the Item FastTab (*Figure 4-52*).

| | ← Add Before → Add Afte | er | Ŕ |
|-------------------------------------|-------------------------|--------------------------|-------|
| Page Name · · · · · · · · Item Card | Pag | ge Type · · · · · · Card | |
| Control Name | Kind | Parent Name | Ý |
| content | Area | | |
| <u>ltem</u> | Group | content | |
| No. | Field | ltem | |
| Description | Field | ltem | |
| Description 2 | Field | ltem | |
| Blocked | Field | ltem | |
| Туре | Field | ltem | |
| Base Unit of Measure | Field | ltem | |
| Last Date Modified | Field | ltem | |
| GTIN | Field | ltem | |
| Item Category Code | Field | ltem | |
| Manufacturer Code | Field | ltem | |
| Service Item Group | Field | ltem | - |
| | | | Close |

Figure 4-52

Back in the HTML Editor FastTab, the HTML Editor Placed is now set to yes (Figure 4-53).

| HTML Editor | | |
|---------------------------|---|-----|
| HTML Editor Content Field | \cdot SDC Additonal Item Notes \sim | |
| HTML Editor Placed | | - 1 |
| Place Editor to Page | | - 1 |
| Remove Editor from Page | | |



You then publish the app extension from the **SD Easy Customise Setup** card which will create and publish an extension that contains all the changes you have made in SD Easy Customise.





When you have published the app, navigate to the **Item Card** where you now enter data into the new field, Additional Item Notes, using a HTML Editor (*Figure 4-54*).

| Home Request Approv | al Item Prices & Discounts Act | ions 🗸 Related 🗸 Reports 🗸 Automate | e 🗸 Fewer options | | |
|---|--|-------------------------------------|-------------------|--|---|
| 陷 Copy Item 🛛 🦓 Adj | ust Inventory 🛛 🟯 Create Stockkeepi | ng Unit 📑 Apply Template | | | |
| Item | | | | | Show le |
| Blocked Type Base Unit of Measure Last Date Modified GTIN Item Category Code Service Item Group | PARIS Guest Chair, black PARIS Guest Chair, black PCS Inventory CHAIR CHAIR | Exclude From Service · | | B I U S ³⁹ 6 a x, x ² A a = <i>I</i> _x Normal c Arial | H₄ H₂ I≣ I≣ Normal ≎ about the item |
| Automatic Ext. Texts Common Item No Purchasing Code | | | | | |
| Variant Mandatory if Ex | Default (No) | | | | |

Figure 4-54





4.4 SD Easy Customise – Placing Fields on Reports

You can place newly created fields on reports from the **SD Easy Customise Table** card or from the **SD Easy Customise Report** card.

In this example we will use the **SD Easy Customise Report** card to place fields on to reports. Open the **SD Easy Customise Reports** list, which is accessed from the **SD Easy Customise Setup**, the **SD Easy Customise Role Centre** or by searching the **Tell Me**.

In the **SD Easy Customise Reports** list, select the report that you want to place the field, or fields, to and select the **Extend** action (*Figure 4-55*).

| > Search | | 🔵 Analyse 🛛 Manage 🔽 E | xtend T Ex | tended Only 🗙 Re | move Extension | | ¢ 7 |
|-----------------|-----|----------------------------|------------|------------------|-------------------|------------------|------------------|
| Report No. ↑ | | Report Name | Extended | Processing Only | Default Layout | Placed Fields | Modified At |
| 98 | | Date Compress General Le | | | RDLC | 0 | 23/10/2023 14:50 |
| 99 | | Delete Empty G/L Registers | | | RDLC | 0 | 23/10/2023 14:50 |
| <u>101</u> | - 1 | Customer - List | | | RDLC | 0 | 23/10/2023 14:50 |
| 103 | | Customer Register | | | RDLC | 0 | 23/10/2023 14:50 |

Figure 4-55

In the SD Easy Customise Report card, chose the New Layout action (Figure 4-56).

| 101 | | | |
|--------------------------------------|--|---------------|------------------|
| 🗱 Place Fields 🕑 New Layout 🚯 Update | Layout 📑 Export Layout 📑 Import Layout 📑 | Remove Layout | More options |
| General | | | |
| Report No. | | 101 | Default Layout |
| Report Name | Customer - List | | RDLC Layout Path |
| Report Extension ID | | 0 | _ |
| | | | Trigger Content |





Select the Place Fields action to place fields on the report (Figure 4-57).

| 101 | | | | | |
|------------------------------------|-------------------------------------|-------------------|---|------------------------|-----|
| 🖼 Place Fields 🔠 New Layout 🛛 🕏 Up | date Layout 🛛 Export Layout 📑 Impor | t Layout 🛛 🔀 Remo | ove Layout More options | | |
| General | | | | | |
| Report No. | | 101 | Default Layout RDLC | | |
| Report Name | Customer - List | | RDLC Layout Path | | |
| Report Extension ID | | 50000 | | | |
| | | | Trigger Content · · · · · · · · · · · · · · · · · · · | | |
| Placed Fields Placed Fields | | | | | r e |
| | | | | | |
| Name T | Dataitem | | Table No. † Table Name | Field No. † Field Name | |

Figure 4-57

The Report Controls page opens. Select the Add action (Figure 4-58).

| Search Add | | | | Ŕ |
|----------------------------------|----------|-----------------------------|------------|------------|
| eport Name | 101 | Report Name · · · · · · · · | Customer - | List |
| Name | Туре | Parent Name | Table No. | Table Name |
| Customer | Dataltem | | 18 | Customer |
| COMPANYNAME | Column | Customer | 0 | |
| Customer_TABLECAPTIONC | Column | Customer | 0 | |
| CustFilter | Column | Customer | 0 | |
| Customer_No_ | Column | Customer | 0 | |
| Customer_Customer_Posting_Group_ | Column | Customer | 0 | |
| Customer_Customer_Disc_Group_ | Column | Customer | 0 | |
| Customer_Invoice_Disc_Code_ | Column | Customer | 0 | |
| Customer_Customer_Price_Group_ | Column | Customer | 0 | |
| Customer_Fin_Charge_Terms_Code_ | Column | Customer | 0 | |
| CustomerPayment_Terms_Code_ | Column | Customer | 0 | |
| CustomerSalesperson_Code_ | Column | Customer | 0 | |
| CustomerCurrency_Code_ | Column | Customer | 0 | |
| Customer Credit Limit LCV | Column | Customer | ٥ | • • |
| | | | | Close |







In the **From DataItem** page, choose the data item which the field that you want to place on the report will come from (*Figure 4-59*).

| Dataltem Name | | Table No. | Table Name | | |
|-------------------|---|-----------|------------|----|--------|
| → <u>Customer</u> | : | 18 | Customer | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | ОК | Cancel |
| | | | | | |

Figure 4-59

Scroll down in the **Fields** list and select the required field. Choose **OK** to close the **Fields** list *(Figure 4-60)*.

| elds 🔍 🖓 🗸 | | | | | | | | | | |
|-------------|------------|-------------|--------------------------|--------------------------|---------|-------------|--------|----------------------------|----------------------|------------------------|
| Table No. † | Table Name | Field No. † | Field Name | Field Caption | Туре | Field Class | Length | Object Builder Field | Placed On Page | Placed On Report |
| 18 | Customer | 9 | Phone No. | Phone No. | Text | Normal | 30 | No | No | No |
| 18 | Customer | 10 | Telex No. | Telex No. | Text | Normal | 20 | No | No | No |
| 18 | Customer | 11 | Document Sending Profile | Document Sending Profile | Code | Normal | 20 | No | No | No |
| 18 | Customer | 12 | Ship-to Code | Ship-to Code | Code | Normal | 10 | No | No | No |
| 18 | Customer | 14 | Our Account No. | Our Account No. | Text | Normal | 20 | No | No | No |
| <u>18</u> | Customer | 15 | Territory Code | Territory Code | Code | Normal | 10 | No | Yes | No |
| 18 | Customer | 16 | Global Dimension 1 Code | Global Dimension 1 Code | Code | Normal | 20 | No | No | No |
| 18 | Customer | 17 | Global Dimension 2 Code | Global Dimension 2 Code | Code | Normal | 20 | No | No | No |
| 18 | Customer | 18 | Chain Name | Chain Name | Code | Normal | 10 | No | Yes | No |
| 18 | Customer | 19 | Budgeted Amount | Budgeted Amount | Decimal | Normal | 0 | No | No | No |
| 18 | Customer | 20 | Credit Limit (LCY) | Credit Limit (LCY) | Decimal | Normal | 0 | No | No | No |
| 18 | Customer | 21 | Customer Posting Group | Customer Posting Group | Code | Normal | 20 | No | No | No |
| 18 | Customer | 22 | Currency Code | Currency Code | Code | Normal | 10 | No | No | No |
| 18 | Customer | 23 | Customer Price Group | Customer Price Group | Code | Normal | 10 | No | No | No |





In the **Report Controls** list you can see the newly placed field (*Figure 4-61*). Close the **Report Controls** page.

| 🔎 Search 👖 Add | | | | | Ŀ |
|----------------------------------|----------|-----------------------------|------------|------------|---|
| eport Name | 101 | Report Name · · · · · · · · | Customer - | List | |
| Name | Туре | Parent Name | Table No. | Table Name | |
| Customer | Dataltem | | 18 | Customer | |
| SDC_Territory_Code | Column | Customer | 18 | Customer | |
| COMPANYNAME | Column | Customer | 0 | | |
| Customer_TABLECAPTIONC | Column | Customer | 0 | | |
| CustFilter | Column | Customer | 0 | | |
| Customer_No_ | Column | Customer | 0 | | |
| Customer_Customer_Posting_Group_ | Column | Customer | 0 | | |

Figure 4-61

Back in the **Report** card, choose the **Update Layout** action to update the layout (*Figure 4-62*).

| 🖾 Place Fields 🔚 N | ew Layout 🛛 😫 Update Layo | out 🚺 Export Lay | out 📑 Import Layo | ut 🔀 Remove La | ayout |
|---------------------|---------------------------|------------------|-------------------|----------------|-------|
| General | | | | | |
| Report No. | | 101 De | fault Layout | RDLC | |
| Report Name | Customer - List | RD | DLC Layout Path | | |
| Report Extension ID | | 0 | | | |
| | | Tri | gger Content | No | |
| | | | | | |
| Placed Fields | Delete Line | | | | Ŕ |

Figure 4-62





Choose the **Export Layout** action to export and edit the report layout in a Report Layout Editor of your choice (*Figure 4-63*).

| 📆 Place | Fields Bnew Layout B Update | Layout 🗋 Ex | port Layout 📑 Import Layo | out 🔀 Remov | e Layout More options | 5 | | |
|-------------|---------------------------------|---------------|---------------------------|-------------|-----------------------|------------|-------------|----------------|
| General | I | | | | | | | |
| Report No |). | | | 101 | Default Layout | | RDLC | |
| Report Na | ame cu | stomer - List | | | RDLC Layout Path | | | |
| Report Ext | tension ID | | | 50000 | | | | |
| | | | | | Trigger Content | ••••••• | Yes | |
| Placed F | ields 🕃 Delete Line | | | | | | | Ľ |
| Nar | ne î | | Dataitem | | Table No. † | Table Name | Field No. † | Field Name |
| → <u>AO</u> | B Territory Code | | Customer | | 18 | Customer | 15 | Territory Code |

Figure 4-63

You do not need to publish the extension app to see the field in the data item on the exported layout as the field is added to the layout immediately (*Figure 4-64*).

| | CustomerList.rdlc [Design] 😐 🗙 | • ₹ ₽ × |
|--|--|--|
| | | E. X |
| [&ExecutionTime | [Customer ListCaption] | Customer_Fin_Charge_Ter A |
| [PageNumber [&UseriD | | Customer_Payment_Terms |
| COST | [COMPANYNAME] | Customer_Salesperson_Co |
| | | Customer_Currency_Code_ |
| | [Customer_TABLECAPTIONCustFilter] | Customer_Credit_Limit_L(|
| | | Customer_Credit_Limit_L(|
| istomer Paym [Customer Salespe [Customer Curr it LCY Caption] :e LCY Caption | Customer No Cap Customer Cust Customer Cust Customer Invoi | Customer_Balance_LCY_ |
| | | Customer_Balance_LCY_I |
| stomer_Paymi [Customer_Salesper [Customer_Curre [Customer_Credit [Customer_Balar | [Customer_No_] [Customer_Custo [Customer_Custo [Customer_Invoic [| CustAddr_1_ |
| | [CustAddr_1_][CustAddr_2_][CustAddr_3_][CustAddr_4_][CustAddr_5_][CustAddr_6_] | CustAddr_2_ |
| | [Customer_ContactCaption]: [Customer_Contact] | CustAddr_3_ |
| | [Customer_Phone_No_Caption]: [Customer_Phone_No_] | CustAddr_4_ |
| | | CustAddr_5_ Customer Contact |
| | | Customer_Contact |
| | | |
| | | Customer_Phone_No_ |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No CustAddr_6_ |
| [Sum(Customer_Balanco_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_6_ CustAddr_7_ |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No CustAddr_6_ CustAddr_7_ CustAddr_7_ CustomerListCaption |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No CustAddr_6_ CustAddr_7_ CustomerListCaption CurrReport_PAGENOCaptic |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_6_ CustAddr_7_ Customer_ListCaption CurrReport_PAGENOCaptic Customer_No_Caption |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_6_ CustAddr_7_ Customer_ListCaption CurrReport_PAGENOCaptic Customer_No_Caption Customer_No_Caption |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_6_ CustAddr_7_ Customer_ListCaption CurReport_PAGENOCaptic Customer_No_Caption Customer_Customer_Posti Customer_Customer_Disc_ |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_5_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_No_Caption Customer_Customer_Dosti Customer_Customer_Disc_ Customer_Invoice_Disc_ |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No CustAddr_6_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_No_Caption Customer_Customer_Posti Customer_Customer_Posti Customer_Lustomer_Disc_ Customer_Lustomer_Disc_ Customer_Lustomer_Disc_ |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_6_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_No_Caption Customer_Customer_Posti Customer_Customer_Disc_ Customer_Lotomer_Disc_ Customer_Lotomer_Price Customer_Lotomer_Price Customer_Lotomer_Price |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_5_ CustAddr_7_ Customer_ListCaption Customer_No_Caption Customer_Customer_Posti Customer_Customer_Posti Customer_Customer_Posti Customer_Customer_Price Customer_Customer_Price Customer_Fin_Charge_Ter Customer_Paymen_Terms |
| [Sum(Customer_Balance_LCY_) | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_5_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_Customer_Posti Customer_Customer_Posti Customer_ListCaption Customer_Invoice_Disc_ Customer_Invoice_Disc_ Customer_Invoice_Disc_ Customer_Invoice_Disc_ Customer_Incharge_Tei Customer_Payment_Terms Customer_Salesperson_Co |
| [Sum(Customer_Balance_LCY_) | [Total_LCY_Caption] | Customer_Phone_No_ CustAddr_5_ CustAddr_7_ CustAddr_7_ Customer_ListCaption CurReport_PAGENOCaptic Customer_No_Caption Customer_Customer_Disc. Customer_Customer_Disc. Customer_Customer_Dirce. Customer_Customer_Price. Customer_Satesperson_Co Customer_Satesperson_Co |
| | | Customer_Phone_No_ CustAddr_5_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_No_Caption Customer_Customer_Disc_ Customer_Customer_Disc_ Customer_Livoice_Disc_ Customer_Livoice_Disc_ Customer_Fine_Charge_Tel Customer_Fine_Charge_Tel Customer_Salesperson_Co Customer_Currency_Code, Customer_Currency_Code, |
| [Sum(Customer_Balance_LCY_)] | [Total_LCY_Caption] | Customer_Phone_No CustAddr_5_ CustAddr_7_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_Customer_Posti Customer_Customer_Posti Customer_Linvoice_Disc_ Customer_Invoice_Disc_ Customer_Invoice_Disc_ Customer_Invoice_Disc_ Customer_Incharge_Tei Customer_Salesperson_Co Customer_Customer_Tems Customer_Calesperson_Code, Customer_Credit_Limit_L(Customer_Credit_Limit_L(|
| | | Customer_Phone_No_ CustAddr_5_ CustAddr_5_ CustAddr_7_ Customer_ListCaption Customer_No_Caption Customer_Customer_Posti Customer_Customer_Pisc_ Customer_Customer_Pisc_ Customer_Customer_Pisc_ Customer_Satesperson_Co Customer_Satesperson_Co Customer_Centerox_Code Customer_Centerox_Code Customer_Centerox_Code Customer_Centerox_Code Customer_ContactCaption |
| Column Groups | Row Groups | Customer_Phone_No_ CustAddr_5_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_No_Caption Customer_Customer_Posti Customer_Customer_Posti Customer_Customer_Posti Customer_Customer_Price Customer_Customer_Fice Customer_Fin_Charge_Tel Customer_Salesperson_Co Customer_Ceretit_Umit_L(Customer_Ceretit_Umit_L(Customer_Ceretit_Umit_L(Customer_Ceretit_Umit_L(Customer_ContactCaption |
| Column Groups | Row Groups | Customer_Phone_No_ CustAddr_5_ CustAddr_7_ CustAddr_7_ Customer_ListCaption Customer_LostOcaptic Customer_Customer_Posti Customer_Customer_Posti Customer_Customer_Posti Customer_Customer_Pice Customer_Customer_Fice Customer_Customer_Terms Customer_Caster_Source Customer_CertetLimit_Lic Customer_CertetLimit_Lic Customer_CertetLimit_Lic Customer_CertetLimit_Lic Customer_CertetLimit_Lic Customer_CostactCaption |





Place the field on the report layout and save your changes (Figure 4-65).

| rt Data 🔫 👻 | # × CustomerList.rdlc (Design)* ** × |
|--|--|
| Customer_Fin_Charg | |
| Customer_Payment_T | |
| | FRI Ice |
| Customer_Salesperso | I_CO [COMPANYNAME] |
| Customer_Currency_C | |
| Customer_Credit_Lim | |
| Customer_Credit_Lim | |
| Customer_Balance_L | |
| | |
| CustAddr_1_ CustAddr 2 | [Customer_No_] [Customer_Custo [Customer_Losto [Customer_Invoic [Customer_Custo [Customer_Fin_C [Customer_Paymi [Customer_Salesper [Customer_Curre [Customer_Credit [Customer_Ba |
| CustAddr_2_ | [CustAddr 1_][CustAddr 2_][CustAddr 3_][CustAddr 4_][CustAddr 5_][CustAddr 7_] |
| | [Customer_ContactCaption]; [Customer_Contact] |
| CustAddr_4_ | [Customer_Phone_No_Caption]: [Customer_Phone_No_] |
| | [rerritory Code: [SDC_Territory_Code] |
| Customer_Contact | |
| Customer_Phone_No CustAddr_6_ | |
| | [Total_LCY_Caption] [Sum(Customer_Balance_LCY |
| | |
| Customer_ListCaptic | |
| CurrReport_PAGENOC | |
| Customer_No_Caption | |
| Customer_Customer_ | |
| Customer_Customer_ | |
| Customer_Invoice_Di | |
| Customer_Customer_ | |
| Customer_Fin_Charg | |
| Customer_Payment_T | |
| Customer_Salesperso | |
| Customer_Currency_C | |
| Customer_Credit_Lim | |
| Customer_Balance_L Customer_ContactCap | |
| | |
| Customer_Phone_No | |
| Total_LCY_Caption | |
| SDC_Territory_Code | |

Figure 4-65

Back in SD Easy Customise, import the amended report layout (Figure 4-66).

| 101 | | | | | | | |
|--------------------------------------|--------------------|--------------------------|-------------|----------------------|---------------------|------------|---|
| 🚆 Place Fields 🛛 🔠 New Layout 🛛 🛃 Up | date Layout 🛛 🗋 Ex | port Layout 🕻 Import Lay | out 🔀 Remov | e Layout More option | 15 | | |
| General | | | | | | | |
| Report No. | | | 101 | Default Layout | RDLC | | |
| Report Name | Customer - List | | | RDLC Layout Path | | | |
| Report Extension ID | | | 50000 | | | | |
| | | | | Trigger Content | Yes | | |
| | | | | | | | |
| Placed Fields 🛛 🏞 Delete Line | | | | | | | Ŕ |
| | | | | | | | |
| Name ↑ → AOB Territory Code | | Dataitem Customer | | | Table Name Customer | Field Name | |





Your new layout has imported and the RDLC Layout Path is updated (Figure 4-67).

| 🖹 Place Fields | New Layout | 😼 Update Layout | 📑 Exp | oort Layout | 🔓 Import Layout | 🖹 Remove L | ayout ··· |
|-----------------------|---------------|-----------------|-------|-------------|---------------------|--------------|----------------|
| General | | | | | | | |
| Report No. | | | 101 | RDLC La | ayout Path | ReportExtens | sion/SDCCustom |
| Report Name | Custor | mer - List | | | | LISTEXT.FOIC | |
| Report Extension | ID · · · · · | | 0 | | | | |
| Default Layout | RDLC | | | Trigger | Content · · · · · · | No | |
| | | | | | | | |
| Placed Fields | 🔁 Delete Line | 2 | | | | | r (|
| Name 1 | | Dataitem | | Table No.↑ | Table Name | Field No. 🕇 | Field Name |
| ightarrow SDC Territo | rv Code | Customer | | 18 | Customer | 15 | Territory Code |

Then publish the extension app from the **SD Easy Customise Setup** card which will create and publish an extension that contains all the changes you have made in SD Easy Customise.

Then, as per standard Microsoft Dynamics Business Central, use the **Report Layout Selection** to set the report to use your **Custom Layout**.





4.5 SD Easy Customise – Morphing Fields to Other Tables

When you have created fields on a table you can specify if the new fields morph to fields in other tables that are associated with the table where you have created the originating field.

In an example above, we added a new field, Industry Sector, to the Customer table (*Figure 4-68*).

| 🗟 Set Status To Pending 🛛 🔡 Set Status To New 🛛 🗙 | Set As Obsolete Autom | mate \sim Fewer options | |
|---|-----------------------|--|--------|
| General | | | |
| Table No. | 18 | Field Caption | |
| Table Name · · · · · · Customer | | Deployment Status · · · · · · · Pending | |
| Field Class · · · · · · Normal | | Extended Data Type | \sim |
| Field Type Text | | ToolTip Enter the Customer's Industry Sector | |
| Field No. | 50000 | Multiline | |
| Field Name · · · · · · · Industry Sector | | Field Length | 30 |

Figure 4-68

To morph the value of this Industry Sector field to other tables, select the **Field Morphisms** action in the **Table** card (*Figure 4-69*).

| | | \bigcirc | | | | |
|---------------------|---------------------------------------|--|------------------------|-------------------|-------|-------|
| 18 | | | | | | |
| General | | | | | | |
| Table No. | | 18 | Table Extension ID | | | 50000 |
| Table Name | Customer | | Additional Properti | es · · · · No | | |
| Caption · · · · · · | | | Trigger Content | Yes | | |
| | | | | | Pager | 8 2 |
| Fields Set S | Status To Pending 🛛 🔮 S Field Name | et Status To New Deployment Status | Field Type Field Class | Obsolete State | Field | Pla |

Figure 4-69





In this example, we want the contents of the newly created field on the Customer table to morph to the Sales Header table. Select the record in the list and choose the **Enable/Disable** action (*Figure 4-70*).

| Manage | Enable/Disable Toestination Table | Card | | | | |
|---------------|-----------------------------------|------|------------------------|----------------------|---------------|---------|
| | | | | | | |
| | Source Table Name | | Destination Table Name | Routing Field Name | Field Created | Enabled |
| \rightarrow | Customer | : | Sales Header | Sell-to Customer No. | No | No |
| | Customer | | Sales Header | Bill-to Customer No. | No | No |
| | Customer | | Gen. Journal Line | | No | No |

Figure 4-70

Choose Yes to create the Industry Sector field on the Sales Header table (Figure 4-71).

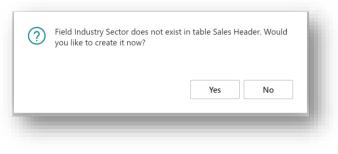


Figure 4-71

Choose the **Destination Table Card** action to open the Table that this field has been added to *(Figure 4-72).*

| Manage | Enable/Disable | ▲ Destination Table Card | ł | | | | |
|---------------|-------------------|--------------------------|---|------------------------|----------------------|---------------|---------|
| | | | | | | | |
| | Source Table Name | | | Destination Table Name | Routing Field Name | Field Created | Enabled |
| \rightarrow | Customer | | | Sales Header | Sell-to Customer No. | Yes | Yes |
| | Customer | | | Sales Header | Bill-to Customer No. | Yes | No |
| | Customer | | | Gen. Journal Line | | No | No |

Figure 4-72





From here you can place the morphed field to the related Sales Header pages (Figure 4-73).

| | | \bigcirc | | | | |
|---------------------|--------------------------|------------------|---------------|-----------------|-----------------|--------------------|
| 36 | | | | | | |
| General | | | | | | |
| Table No. | | 36 | Table | Extension ID | | |
| Table Name | Sales Header | | Additi | onal Properties | No | |
| Caption · · · · · · | | | Trigge | r Content | No | |
| | | | | | | |
| Fields Set | Status To Pending 🛛 🕉 Se | et Status To New | ₽ Field Mo | rphisms 🗸 P | lace Selected T | o Pages \cdots 🖻 |
| | | Deployment | | | Obsolete | Field Morphisms |
| Field No. 1 | Field Name | Status | Field Type | Field Class | State | iviorphisms |

Figure 4-73

You can also morph the Industry Sector field that you placed on the Sales Header table to other tables related to the Sales Header table (*Figure 4-74*).

| 36 |) | | | | | | | |
|--------|---------------------|---------------------|----------------------|--------------------|-----------------|-------------------|--------------------|-----|
| Gene | eral | | | | | | | |
| Table | No. · · · · · · · · | | 36 | Table I | Extension ID | | | |
| Table | Name · · · · · | Sales Header | | Additi | onal Properties | No | | |
| Captic | on •••••• | | | Trigge | r Content | No | | |
| | s 🕞 Set Sta | atus To Pending 🛛 🔮 | Set Status To New | ₽₽ Field Mo | rphisms 🗸 P | Place Selected To | o Pages ···· 🕑 | ₹ 1 |
| Fields | | | | | | | | |
| | Field No. 1 | Field Name | Deployment Status | Field Type | Field Class | Obsolete State | Field Morphisms | |

Figure 4-74

The grid below shows the tables from where you can morph a field to and indicates if you need to use a routing table to morph a field from one table to another (*Table 1*).

| From | Routing | То | |
|---------------|-------------------|---------------|--|
| Standard Text | | Sales Line | |
| Standard Text | | Purchase Line | |
| G/L Account | Gen. Journal Line | G/L Entry | |





| From | Routing | То |
|-----------------|-----------------------------|---------------------------|
| Customer | Field: Bill-To Customer No. | Sales Header |
| Customer | Field: Sell-To Customer No. | Sales Header |
| Customer | Gen. Journal Line | Cust. Ledger Entry |
| Vendor | Field: Pay-To. Vendor No. | Purchase Header |
| Vendor | Field: Buy-From Vendor No. | Purchase Header |
| Vendor | Gen. Journal Line | Vendor Ledger Entry |
| Item | | Purchase Line |
| Item | | Sales Line |
| ltem | | Assembly Header |
| Item | | Job Planning Line |
| ltem | | Production BOM Line |
| Sales Header | | Sales Line |
| Sales Header | Gen. Journal Line | Cust. Ledger Entry |
| Sales Header | Item Journal Line | Item Ledger Entry |
| Sales Header | Item Journal Line | Value Entry |
| Sales Header | Item Journal Line | Capacity Ledger Entry |
| Sales Header | | Sales Shipment Header |
| Sales Header | | Sales Invoice Header |
| Sales Header | | Sales Cr. Memo Header |
| Sales Header | | Sales Header Archive |
| Sales Header | | Warehouse Activity Header |
| Sales Header | | Return Rcpt. Header |
| Sales Line | Item Journal Line | Item Ledger Entry |
| Sales Line | Item Journal Line | Value Entry |
| Sales Line | Item Journal Line | Capacity Ledger Entry |
| Sales Line | | Sales Shipment Line |
| Sales Line | | Sales Invoice Line |
| Sales Line | | Sales Cr. Memo Line |
| Sales Line | | Sales Line Archive |
| Purchase Header | | Purchase Line |
| Purchase Header | Gen. Journal Line | Vendor Ledger Entry |
| Purchase Header | Item Journal Line | Item Ledger Entry |
| Purchase Header | Item Journal Line | Value Entry |
| Purchase Header | Item Journal Line | Capacity Ledger Entry |
| Purchase Header | | Purchase Receipt Header |
| Purchase Header | | Purchase Invoice Header |
| Purchase Header | | Purch. Cr. Memo Header |
| Purchase Header | | Purchase Header Archive |
| Purchase Header | | Return Shipment Header |
| Purchase Line | Item Journal Line | Item Ledger Entry |
| Purchase Line | Item Journal Line | Value Entry |
| Purchase Line | Item Journal Line | Capacity Ledger Entry |
| Purchase Line | | Purchase Receipt Line |
| Purchase Line | | Purchase Invoice Line |





| From | Routing | То |
|----------------------|---------|--------------------------|
| Purchase Line | | Purchase Cr. Memo Line |
| Purchase Line | | Purchase Line Archive |
| Sales Invoice Header | r | Sales Header |
| Ship To Address | | Sales Header |
| Assembly Header | | Posted Assembly Header |
| Item Category | | Item |
| Transfer Header | | Transfer Shipment Header |
| Transfer Header | | Transfer Receipt Header |

Table 4-1





4.6 SD Easy Customise – Code Triggers List

Using the SD Easy Customise Code Triggers list you can easily view existing or add new Property Content or Trigger Content to the various Target Types of Table, Table Field, Page, Page Field, Report or Report Field (*Figure 4-75*).

| 50 | Easy Custon | nise Code Trigge | S | | | | | |
|---------------|---------------|------------------|------------------------|---------------------|--------------------|-----------------|----------------|------------------|
| ۶ | Search 💽 | Analyse + Nev | 🗸 🐺 Edit List 🧻 Delete | | | | L | 87 🗉 |
| | Target Type † | Target ID † | Target Name † | Property Content | Trigger Content | Table Fields | Page Fields | Report Fields |
| \rightarrow | Table | 3.8 | Customer | No | Yes | No | No | No |
| | Table | 23 | Vendor | No | No | No | No | No |
| | Table Field | 18 | Credit Limit (LCY) | Yes | No | No | No | No |
| | Table Field | 18 | Name | No | No | No | No | No |
| | Page | 1 | Company Information | Yes | No | No | No | No |
| | Page | 21 | Customer Card | No | No | No | No | No |
| | Page | 22 | Customer List | Yes | No | No | No | No |
| | Page Field | 22 | Territory Code | No | No | No | Yes | No |
| | Report Item | 104 | Customer | No | No | No | No | No |

Figure 4-75

Drill in on the Property Content column where you can view existing or add new Additional Properties (*Figure 4-76*).

| Set Additional Properties | | | 2 × | ł |
|--|-----------------------------------|----|--------|---|
| Please set your page extension properties here. Property key- value pair must be separated by '=' sign and additional properties must be separated by ';' character. For example, 'Editable = false;AdditionalSearchTerms = 'MY PAGE';' | Click here for Microsoft examples | | | |
| Editable = false;AdditionalSearchTerms = 'MY PAGE'; | | | | |
| | | ОК | Cancel | |

Figure 4-76





Drill in on the Trigger Content column where you can view existing or add new Trigger Code (*Figure 4-77*).

| ease provide your trigger code here. Can be entered anually, copy-pasted or dropped as a file to the drop area elow. For more information on which triggers are available, ease click on the link 'More Info on available triggers' which dircts you to the Microsoft official website. | More Info on available triggers Download Trigger Code | |
|---|--|--------|
| trigger OnInsert() begin Message('OnInsert'); | | • |
| Drop file up | or click to load | |
| | ок | Cancel |

Figure 4-77





4.7 SD Easy Customise – API Pages

With SD Easy Customise using the SD Easy Customise API Page you can easily, create API pages that expose tables to be read from and written to without writing code (*Figure 4-78*).

| 4 . | curre | ncv | | | | | | |
|----------|------------------------|---|--|--|---|--|--|----|
| | curre | ncy | | | | | | |
| 😂 Ref | fresh API Fields | 5 <u>↓</u> Downl | oad API URLs | More option: | 5 | | | |
| Gener | al | | | | | | | |
| Gener | ai | | | | | | | |
| Table N | o. · · · · · · · · · · | | | 4 🗸 | Read Only | •••••• | | |
| Table N | ame · · · · · · | Curren | су | | Published ID | , | | 50 |
| API Gro | up · · · · · · · | AOB | | | | | | |
| | | | | | | | | |
| Entity N | lame | curren | cy | | | | | |
| Entity S | et Name | current | cies | | | | | • |
| | | | | | | | | |
| Field | ls 🍤 Inclu | ude Selected | 诸 Exclude S | elected | | | | Ŕ |
| Field | | ude Selected | • | | | | | Ŕ |
| 1 | Included | ude Selected | Field No. 1 | Field Name | | Туре | Field Class | ß |
| | Included | ude Selected | Field No. † 1 | Field Name Code | 116-1 | Code | Normal | ß |
| 1 | Included | ide Selected | Field No. † 1 2 | Field Name Code Last Date Mo | | Code Date | Normal Normal | Ŕ |
| 1 | Included | ide Selected | Field No. † 1 | Field Name Code | | Code | Normal | ĿĊ |
| 1 | Included | i e e e e e e e e e e e e e e e e e e e | Field No. 1 1 2 3 | Field Name Code Last Date Mo Last Date Adj | usted | Code Date Date | Normal Normal Normal | ĿĊ |
| 1 | Included | : | Field No. ↑ 1 2 3 4 | Field Name Code Last Date Mo Last Date Adj ISO Code | usted Code | Code Date Date Code | Normal Normal Normal Normal | £ |
| 1 | Included | : | Field No. † 1 2 3 4 5 | Field Name Code Last Date Mo Last Date Adj ISO Code ISO Numeric Unrealized Ga | usted Code iins Acc. | Code Date Date Code Code | Normal Normal Normal Normal Normal | Ŀ |
| 1 | Included | : | Field No. † 1 2 3 4 5 6 | Field Name Code Last Date Mo Last Date Adj ISO Code ISO Numeric Unrealized Ga | usted Code iins Acc. s Acc. | Code Date Date Code Code | Normal Normal Normal Normal Normal Normal | Ŀ |
| 1 | Included | ide Selected | Field No. † 1 2 3 4 5 6 7 | Field Name Code Last Date Mo Last Date Adj ISO Code ISO Numeric Unrealized Gain | usted Code nins Acc. s Acc. sses Acc. | Code Date Date Code Code Code | Normal Normal Normal Normal Normal Normal | £ |
| 1 | Included | i e elected | Field No. † 1 2 3 4 5 6 7 7 8 | Field Name Code Last Date Mo Last Date Adj ISO Code ISO Numeric Unrealized Gain Unrealized Loss | usted Code nins Acc. s Acc. sses Acc. | Code Date Date Code Code Code Code Code Code | Normal Normal Normal Normal Normal Normal Normal | Ŀ |

Figure 4-78

You will need to have an app created in Azure and added to the standard Microsoft Business Central **Azure Active Directory Applications** page to get a token for the API.





4.8 SD Easy Customise – Publishing the Extension App

To publish the extension app, navigate to the **SD Easy Customise Setup**. From the **Related** menu group, choose the **Publish App** action (*Figure 4-79*).

| | | ê + 🖻 | |
|---|--|---|---------------------------------|
| SD Easy (| Customise Set | up | |
| Home About Relate | d More options | | |
| ↓ Update Symbols | 🛓 Download Package 🛛 💣 Exter | ision Management | |
| 🗐 Publish App | ↑ Commit Changes ■ Exter | ision Deployment Status | |
| | | | |
| Objects | | | |
| | | | |
| | | | |
| \$°999+ ☆ | 999+ 🋇 684 🕒 |) 1 [<u>[10]</u> 0 | |
| ¥999+ ☆ | '999+ ♥ 684 € _{Reports} API Pr | | |
| · · | | | |
| Tables Pages | | | |
| · · | | | |
| Tables Pages | Reports API Pa | | ;/10/2023 15:41 |
| Tables Pages Extension | Reports API Pa Customisations | iges Code Triggers | |
| Tables Pages Extension App Name | Reports API Pa Customisations | iges Code Triggers | 1/10/2023 15:41 5000 5000 |
| Tables Pages Extension App Name Publisher | Reports API Re Customisations | ges Code Triggers Symbols Last Updated ··· 23 Starting Object ID ····· Starting Field No. ···· | 5000 |

Figure 4-79

• **Publish App** – This action creates and publishes the extension app that contains the changes you have made when, for example, you add new fields to a table and place new or existing fields onto a page or report.

SD Easy Customise creates an extension app that contains all your changes and is designed to be used in a Sandbox environment where, following best practice, users make changes to the objects and then test their changes. Once changes have been tested, users can then deploy the extension app to their live Production environment.





Choose **OK** to the message to begin the extension app installation (*Figure 4-80*).

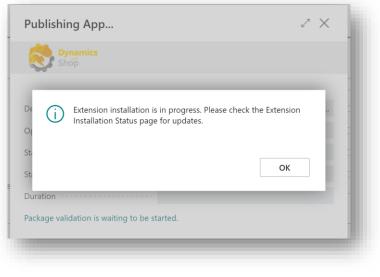


Figure 4-80

The **SD Easy Customise Deployment Status** page updates with details of the installation progress (*Figure 4-81*).

| Publishing App | 2 X |
|-------------------------------------|---------------------------|
| Shop | |
| Uploading Extension: ' | Customisations' by ' |
| Operation Type | DeployPackage |
| Status | InProgress |
| Started On | 23/10/2023 15:46 |
| Duration | 6 seconds 42 milliseconds |
| Package validation is waiting to be | e started. |
| | |

Figure 4-81





5 Uninstalling SD Easy Customise

You can uninstall SD Easy Customise using the Web Client:

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 5-1*).

| 2 | | 2 | NT TO DO | | |
|---------------------------------------|-----|-----|------------------------------|-----------------------------------|----|
| 2 | | | NT 10 00 | TELL ME WHAT YOU WANT TO D | nt |
| | J | | | extension | J |
| | . I | | | Go to Pages and Tasks | L |
| - Sales Credit Memo > Sales > History | | י [| nent Administration | > Extension Management | l |
| | | | e looking for? Try exploring | Didn't find what you were looking | L |
| | | | | + | 2 |
| | | | | | |

Figure 5-1

- 2. In Extension Management, you should see the SD Easy Customise app installed.
- 3. Select the **SD Easy Customise** app and choose the **Uninstall** Action (*Figure 5-2*).

| \leftarrow | Extension Management | | | | | | | |
|--------------|-----------------------|--------------------|-----------------------|--------|-------------------------------|-------------|-------------|----------|
| | ✓ Search Manage M | lore options | | | | | _ | |
| | Extension Marketplace | C Upload Extension | 💕 Installation Status | ⊙ View | } [≭] Install | 🔭 Uninstall | 🛃 Unpublish | 🌇 Set up |
| | | | - | | | | | |

Figure 5-2



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