User Guide for Microsoft Dynamics 365 Business Central

Product: SD Easy Customise

Release: D365 BC V26+

Revision: May 2025

1 Contents

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 or involving a developer.

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 a separate extension app that contains all your changes. In your Production environment, with a subscription licence, you create the extension app, download and, following best practice, install and publish the extension app in your Sandbox environment for testing using Extension Management. You cannot publish the extension app directly into your Live environment, you can only download it. You can also commit your changes to GitHub or DevOps.

Once your changes have been tested in your Sandbox, you can then install and publish the extension app in your live Production environment using Extension Management.

If you choose the Free 30-Day Trial licence in your Sandbox environment, you can create and publish the extension app directly into your Sandbox environment to test, but you cannot download the created extension app to deploy to your Production environment.

If you choose the Free 30-Day Trial licence in your Production environment, you cannot download the created extension app.

3 Installing SD Easy Customise

3.1 Setup Wizard and Activating the Free Trial Licence

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

SD Easy Customise creates a separate extension app that contains all your object changes. In your Live environment with a subscription key, you create the extension app, download and, install and publish the extension app in your Sandbox environment for testing using Extension Management. Once your changes have been tested in your Sandbox, you can then install and publish the extension app in your live Production environment using Extension Management.

If you choose the Free 30-Day Trial licence in your Sandbox environment, you can create and publish the extension app directly into your Sandbox environment, but you cannot download the created extension app to deploy to your Production environment.

On install, the **Setup Wizard** guides you through activating a free 30 day trial and importing setup data.

In the **Setup Wizard**, enter your company name and email. Select **Free Trial** to start a 30 Day Free Trial. Then choose **Next Step** *(Figure 3-1)*.

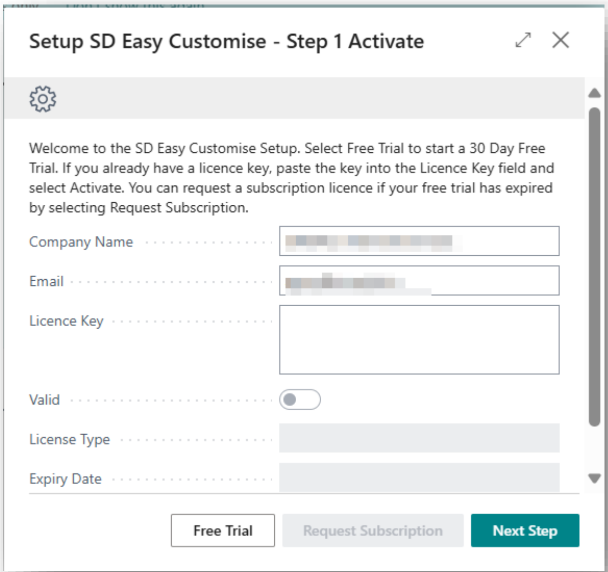


Figure 3-1

You can select the links in the Finish Installation section to open the Setup Card, Role Centre or the Product Info page in another tab. Choosing **Finish** will open the SD Easy Customise Role Centre in another tab. *(Figure 3-2)*.

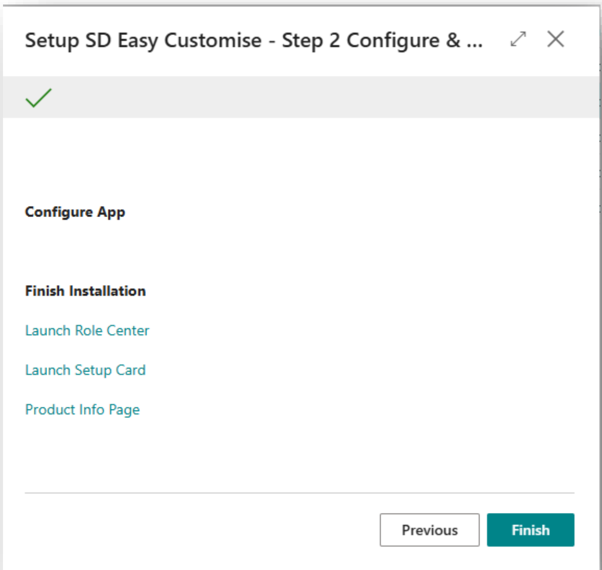


Figure 3-2

3.2 Security Setup

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

Permission Set ↑	Name	Extension Name
SDY EC ADMIN	SD Easy Customise - Admin	SD Easy Customise

Figure 3-3

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

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

3.3 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)*.

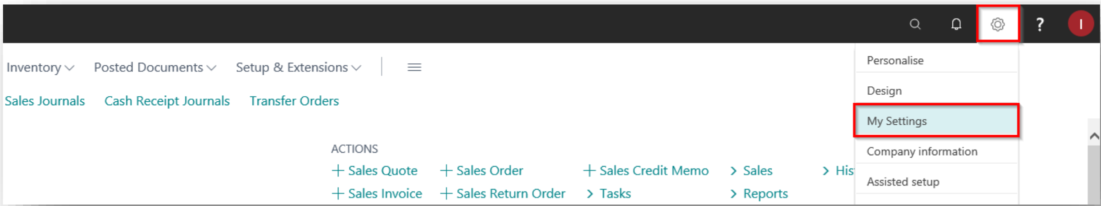


Figure 3-4

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

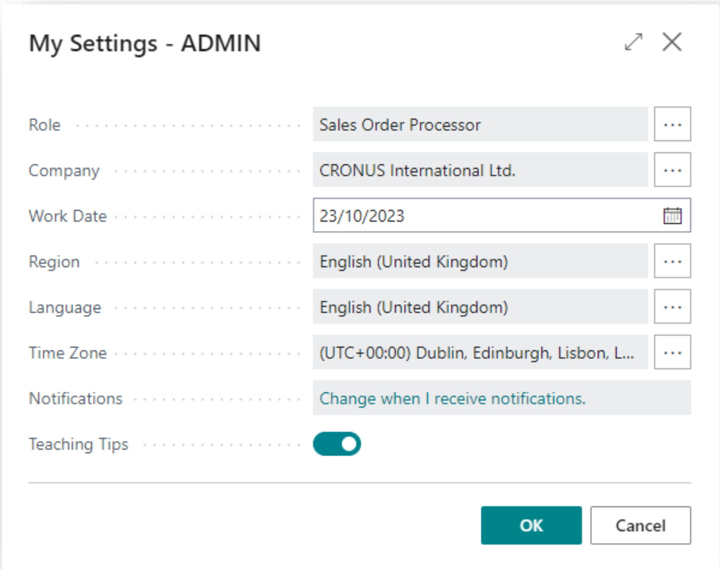


Figure 3-5

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

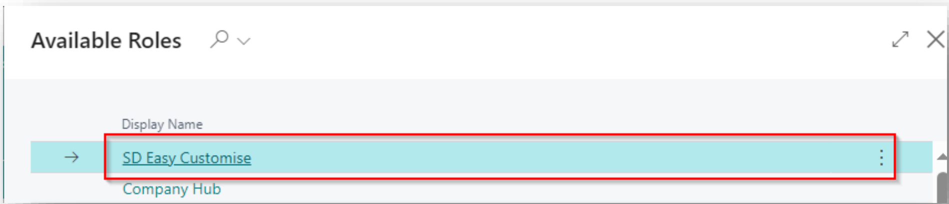


Figure 3-6

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)*.

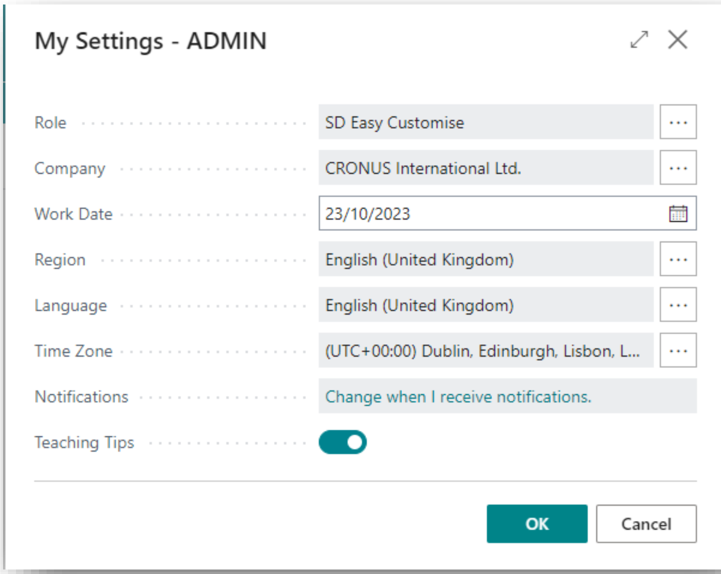


Figure 3-7

3.4 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)*.

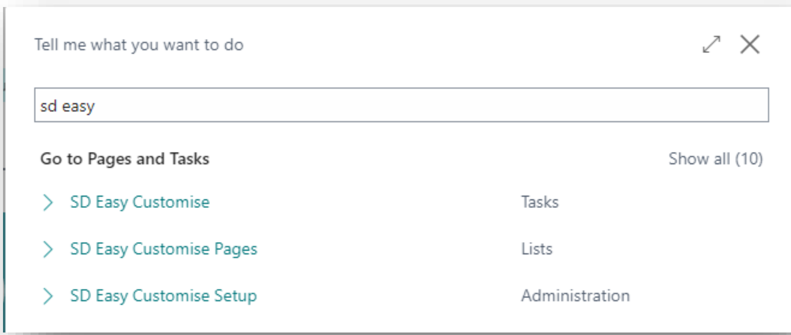


Figure 3-8

3.5 Bookmarking SD Easy Customise to Your Role Centre

For easy access to SD Easy Customise, you can bookmark the SD Easy Customise Role Centre page to your default Role Centre.

Search for **SD Easy Customise** in the Tell Me and choose the Book Mark action to the right of the result *(Figure 3-9)*.

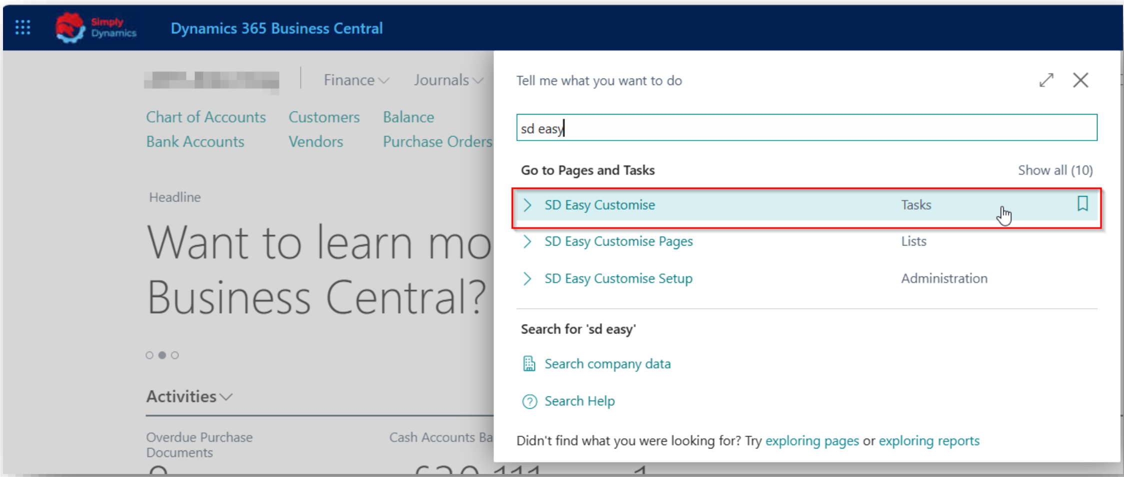


Figure 3-9

The SD Easy Customise page is now available in the navigation menu on your Role Centre *(Figure 3-10)*.

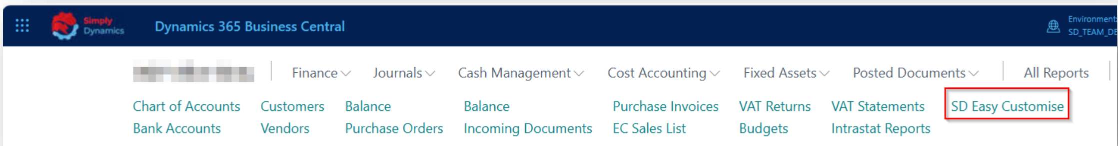


Figure 3-10

3.6 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 3-11)*, or by searching for **SD Easy Customise Setup** in the **Tell Me**.

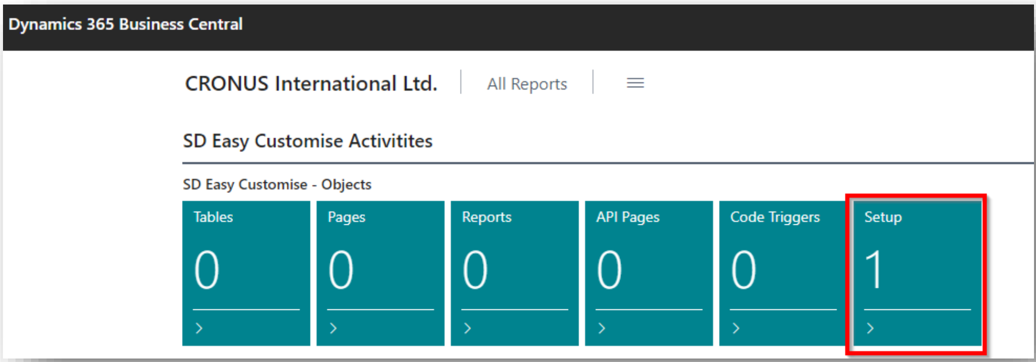


Figure 3-11

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 3-12)*.

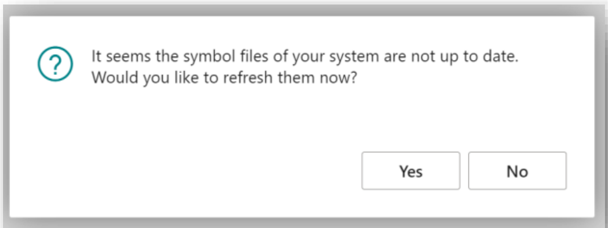


Figure 3-12

The following page is displayed. Choose the **Copy code and open page** action *(Figure 3-13)*.

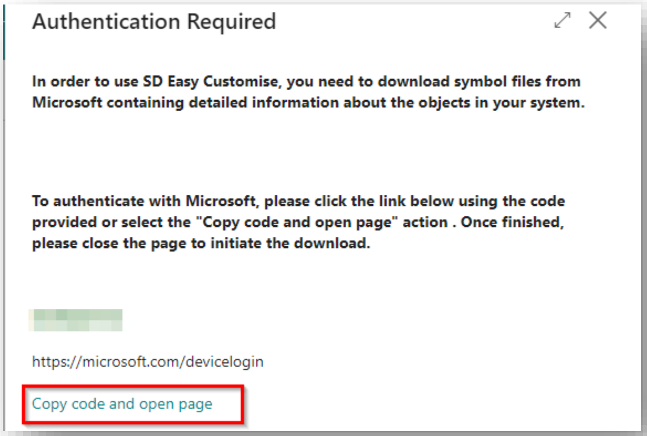


Figure 3-13

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 3-14)*.

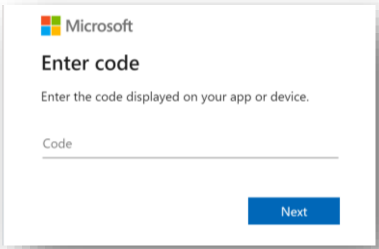


Figure 3-14

Choose **CTRL+V** to paste the code that you have copied from the previous step. Then choose **Next** *(Figure 3-15)*.

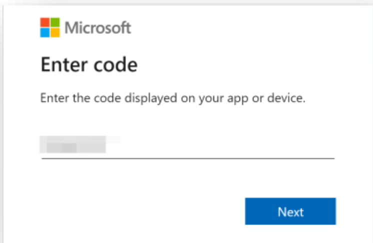


Figure 3-15

To download the symbols from Microsoft, you will need to pick an account with which to sign into Dynamics 365 Developer. If you are downloading symbols in a Sandbox environment you will need to have Super and Exten. Mgt. - Admin permissions. We have extended the Exten. Mgt. - Admin account to include the SDY EC ADMIN permissions. If you are downloading symbols in a Production environment you will need to have Super, Exten. Mgt. - Admin and D365 Snapshot Debug permissions.

Once you have successfully signed in, you will see this page. Close this window *(Figure 3-16)*.

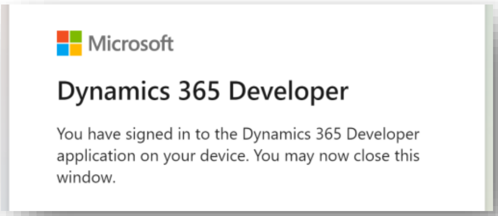


Figure 3-16

Back in your Dynamics 365 Business Central window you will see a message displaying the progress of the symbols download *(Figure 3-17)*.

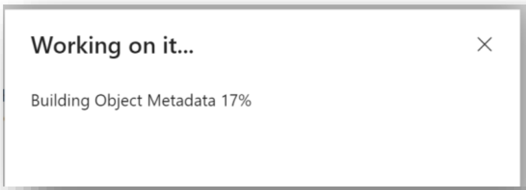


Figure 3-17

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 3-18)*. You can now 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

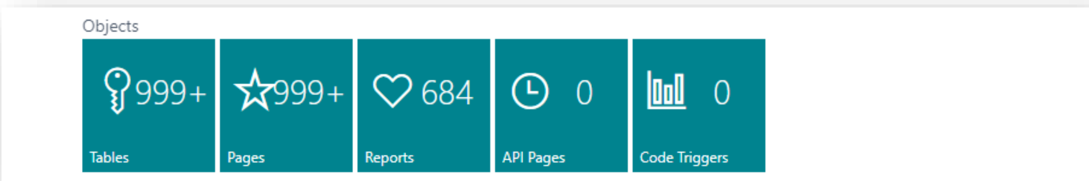


Figure 3-18

3.7 Activating the SD Easy Customise Licence with a Subscription Key

When your free 30 day trial licence has expired, you can request a subscription key from Simply Dynamics.

From the Tell Me, search for and select the **SD Easy Customise Setup** page. In the Home menu group, choose the **Product Activation** action *(Figure 3-19)*.

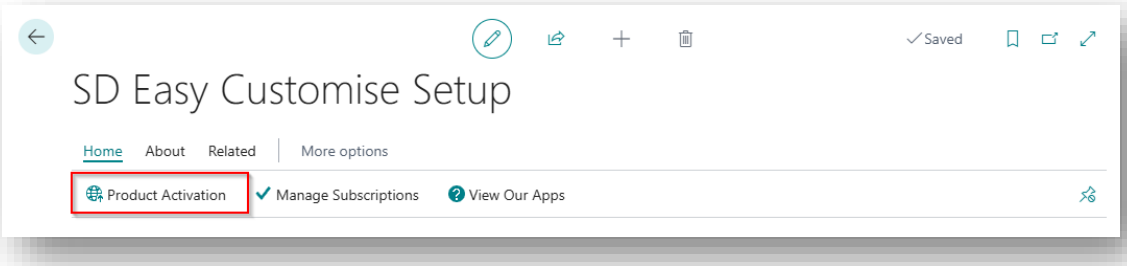


Figure 3-19

In the **Activate your product** page, request a subscription licence by selecting **Request Subscription** *(Figure 3-20)*.

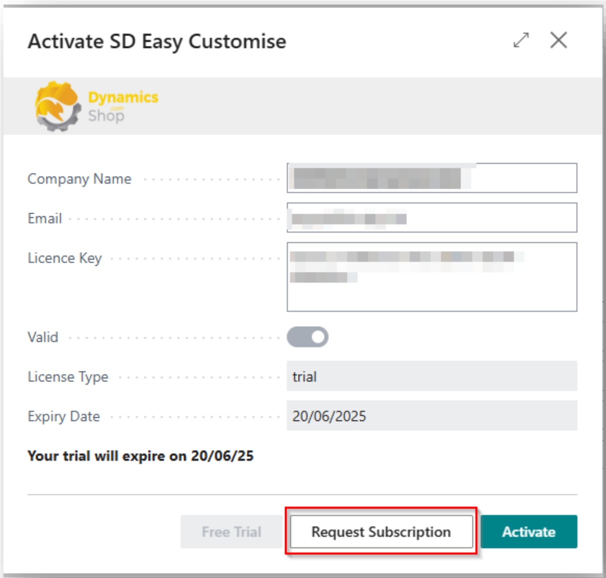


Figure 3-20

When you have received your subscription licence, in your Live Production environment, open the **Activate your product** page *(Figure 3-21)*

1. Enter your company name in **Company Name** and enter your company email in **Email.**

2. 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**.

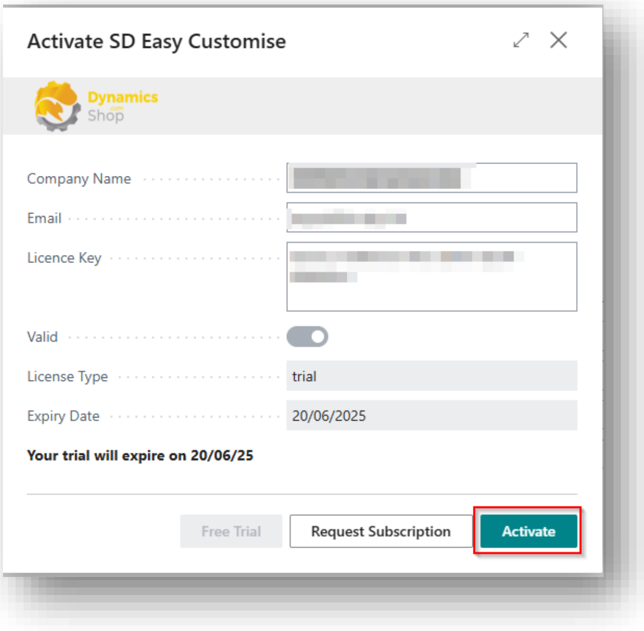


Figure 3-21

3. The **Activate your product** page will update to display a message that the activation was successful. The expiry date will depend on the expiration date of the subscription key. Choose **Finish** to exit the page.

4 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**.

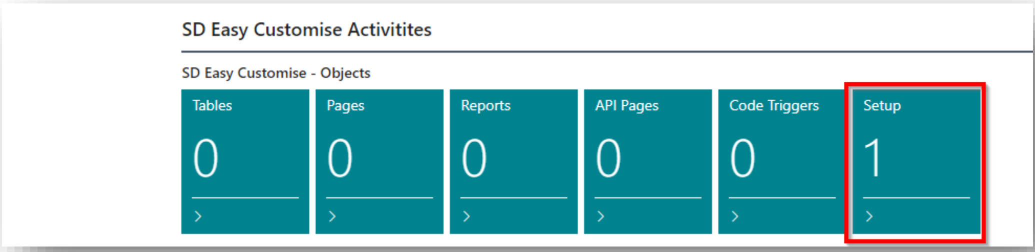


Figure 4-1

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 Sandbox.

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)*.

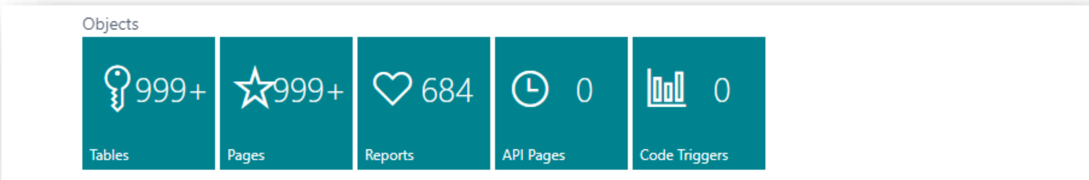


Figure 4-2

- **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)*.

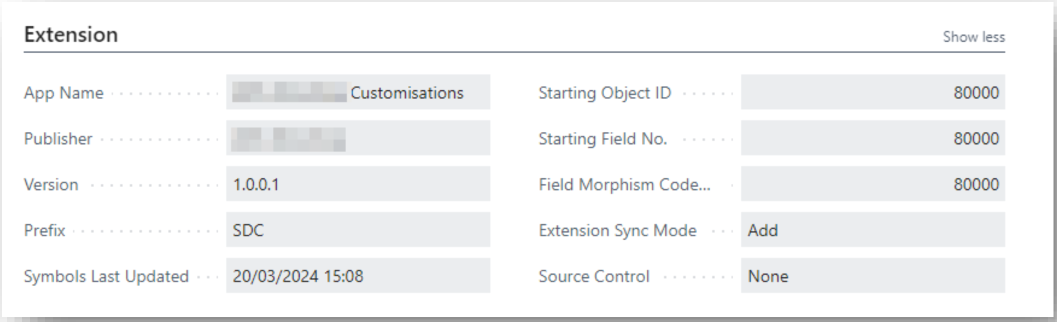


Figure 4-3

- **App Name** –Displays the name of the extension app containing your changes that is created and published. 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 version of the extension app that is created and published using SD Easy Customise. This value automatically increments by 0.1 each time the extension app is published.

- **Prefix** - The prefix to use for the extended objects created by SD Easy Customise. 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.

- **Field Morphism Codeunit ID** - Specify the ID to use for the Codeunit containing the details of field morphisms created 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)*.

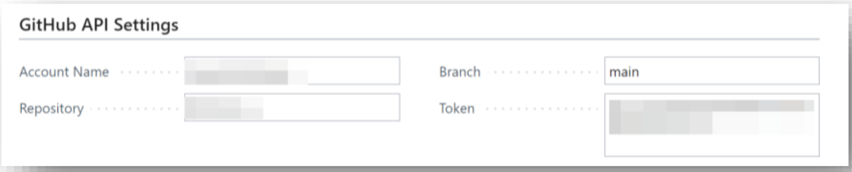


Figure 4-4

- **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 GitHub repository 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)*.

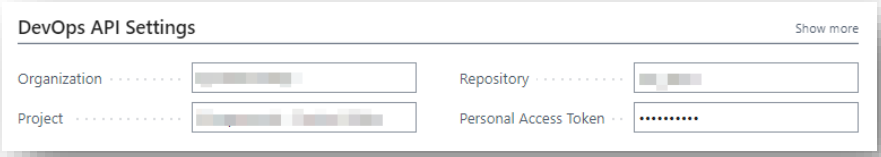


Figure 4-5

- **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.

- **Branch** - The branch in your GitHub repository where you will commit your changes.

- **Personal Access Token** – Enter your DevOps personal access token.

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

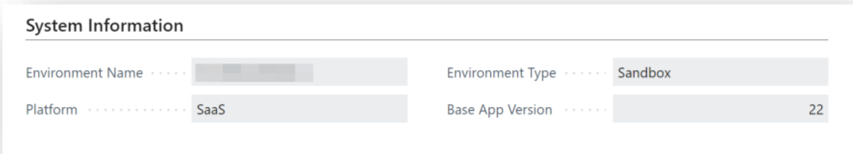


Figure 4-6

- **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.

- **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.

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

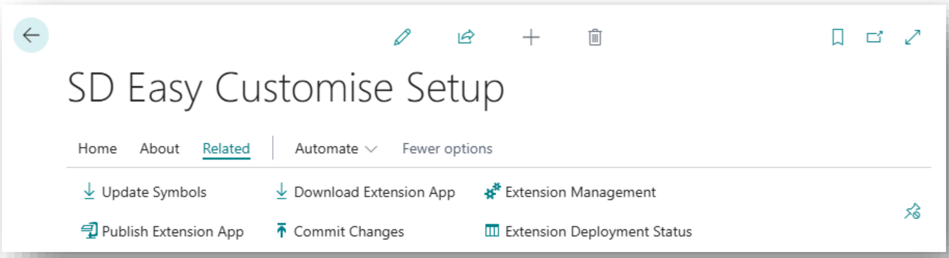


Figure 4-7

- **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.

- **Publish Extension App** – This option is only available in a Sandbox environment with a Trial Licence. 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 in your Sandbox environment that contains all your changes .

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

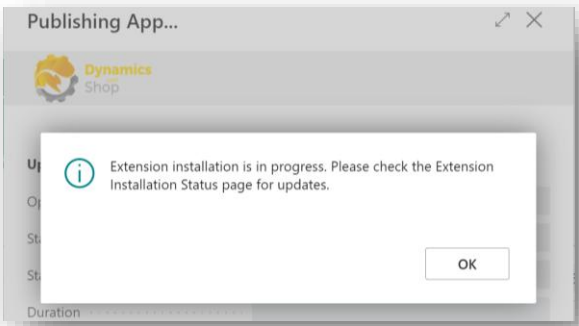


Figure 4-8

- **Download Extension App** – Choose this action to download the extension app that you have created in SD Easy Customise. This option is only available in the live production environment with a subscription licence.

In your Live environment with a subscription key, you make your changes, and download the extension app. Then install and publish the extension app in your Sandbox environment using Extension Management.

You cannot publish the extension app directly into your Live environment, you can only download it.

Once your changes have been tested in your Sandbox, you can then install and publish the extension app in your live Production environment using Extension Management.

- **Commit Changes** – Commits your changes to your GitHub or DevOps repository. Navigate to the SD Easy Customise Source Control Entries page to see the details of the committed objects.

- **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.

5 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 5-1)*.

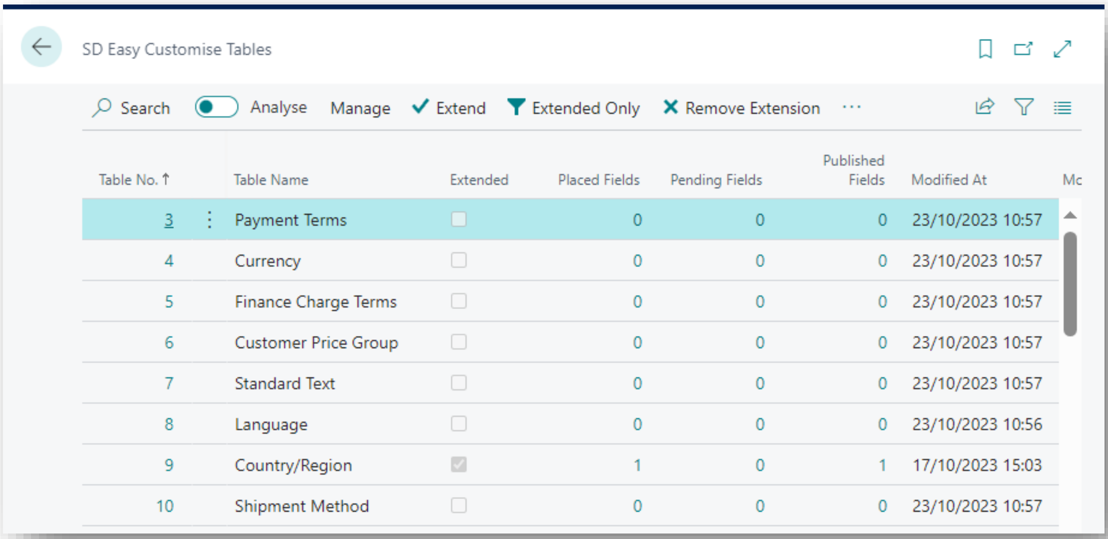


Figure 5-1

Choose the table you want to add a new field to and select **Extend** *(Figure 5-2)*.

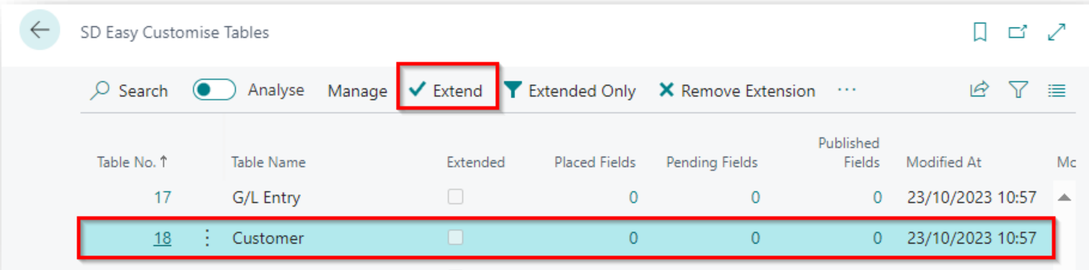


Figure 5-2

The **SD Easy Customise Table** card for the selected table opens. To add a field to the table, choose the **New** action *(Figure 5-3)*.

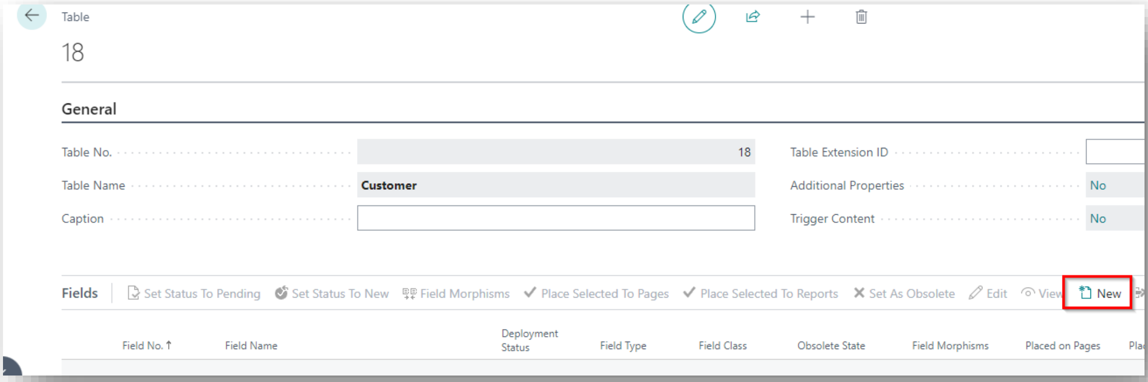


Figure 5-3

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 5-4)*.

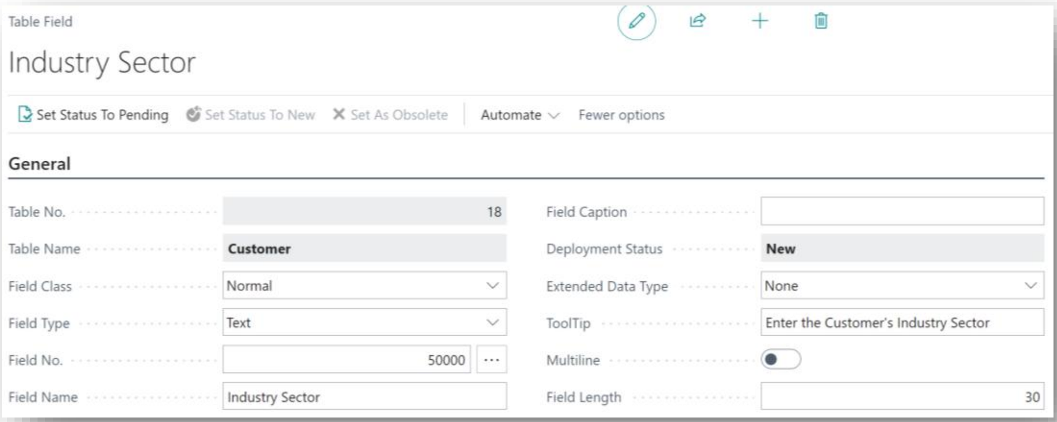


Figure 5-4

- **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 5-5)*.

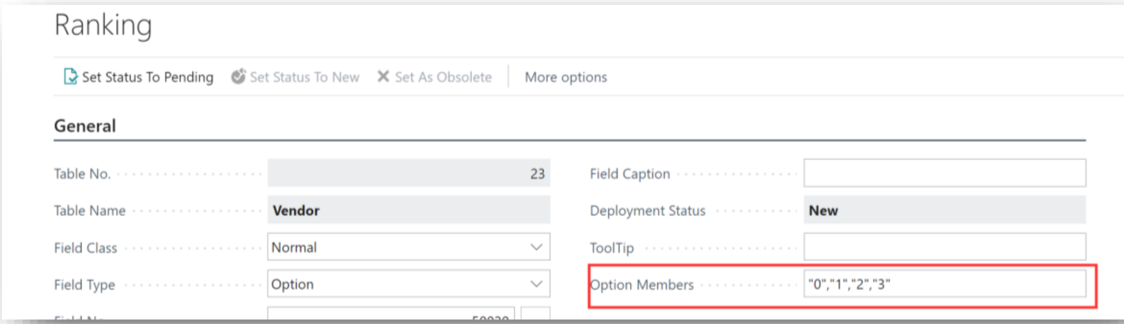


Figure 5-5

  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 5-6)*.

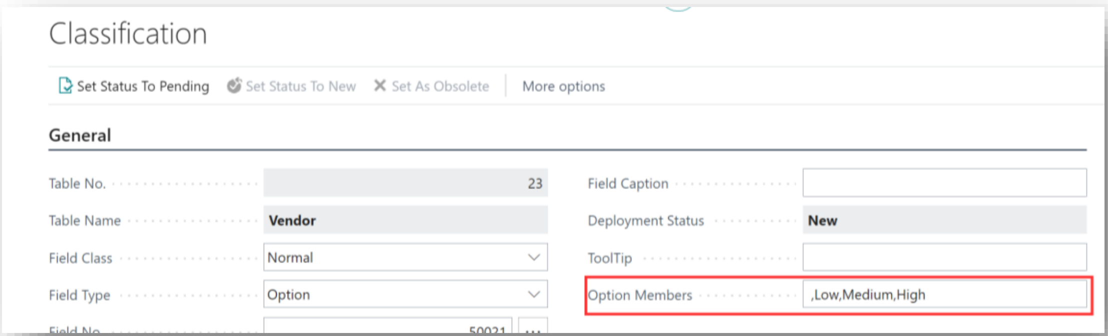


Figure 5-6

- **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 5-7)*.

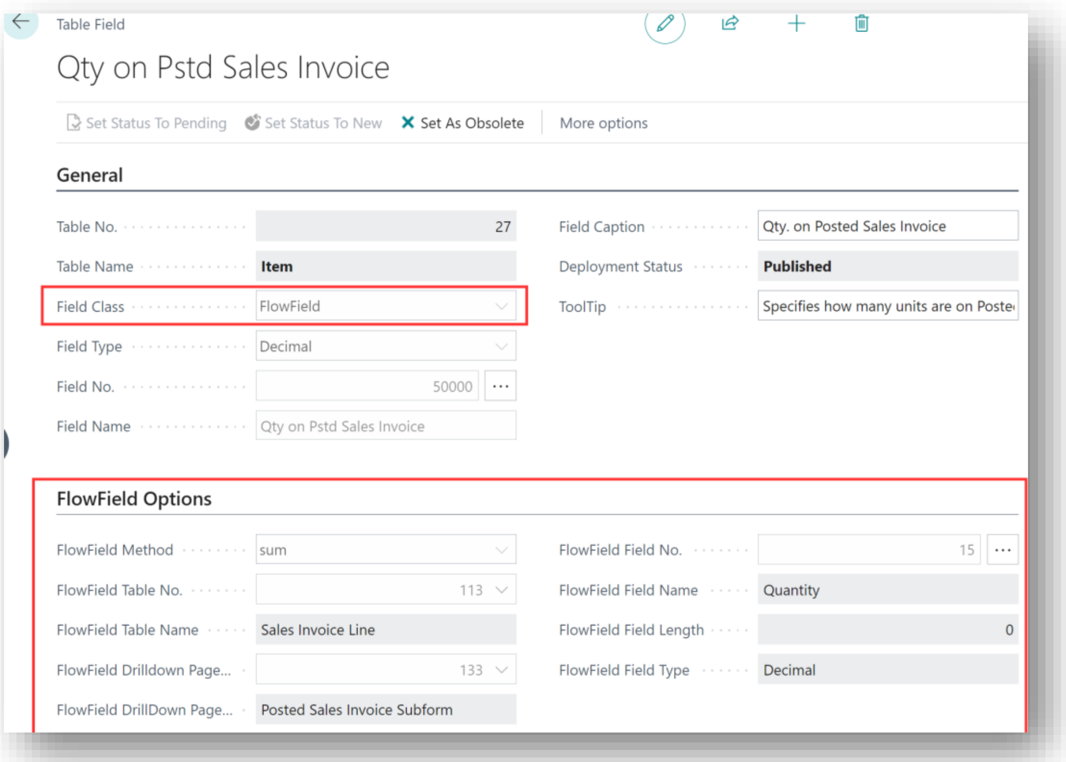


Figure 5-7

You can also add filters to the FlowField *(Figure 5-8)*.

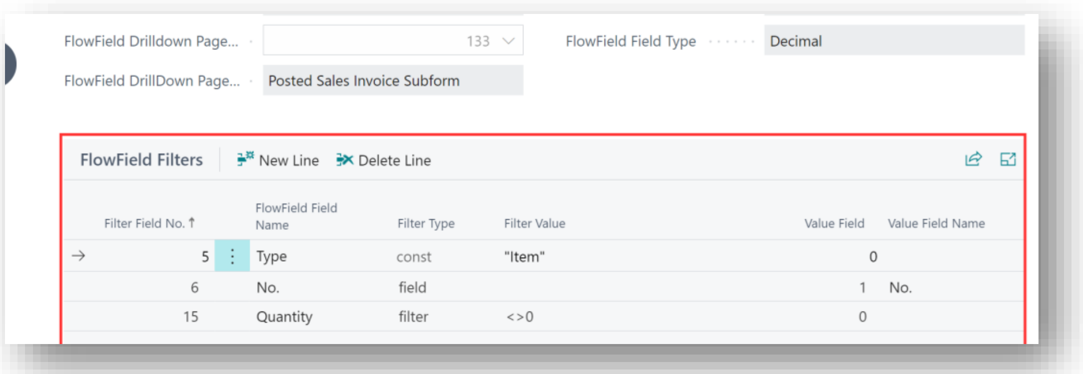


Figure 5-8

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 5-9)*.

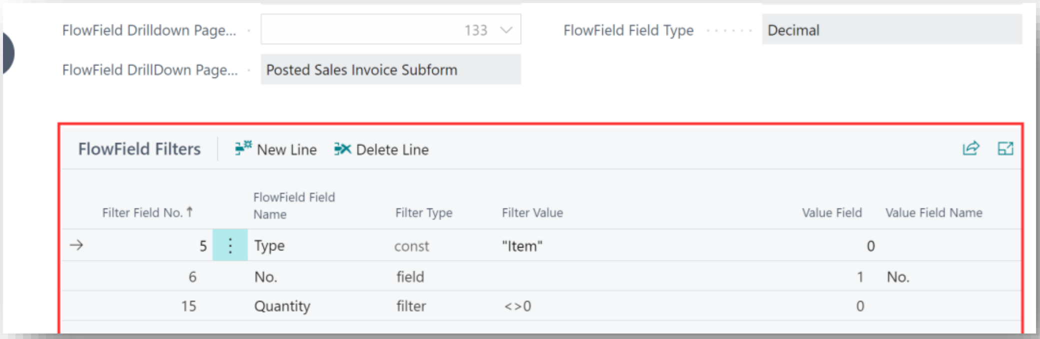


Figure 5-9

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

Below is an example of how to create a Lookup FlowField *(Figure 5-10)*.

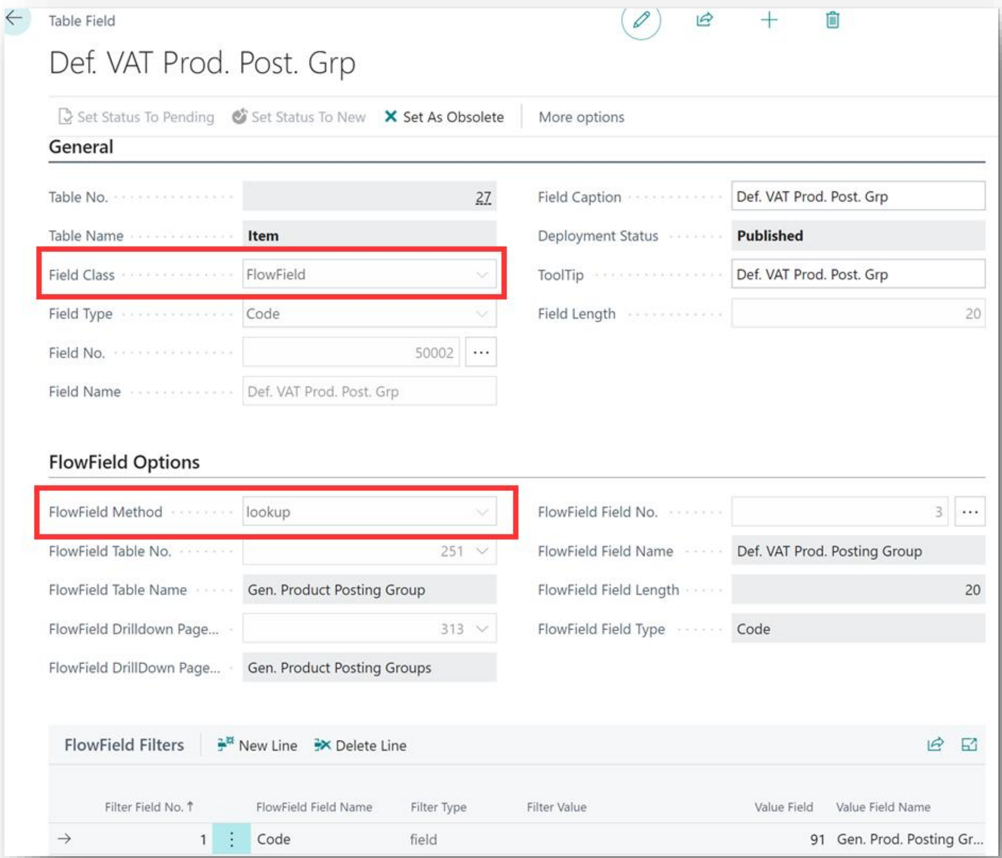


Figure 5-10

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 5-11)*.

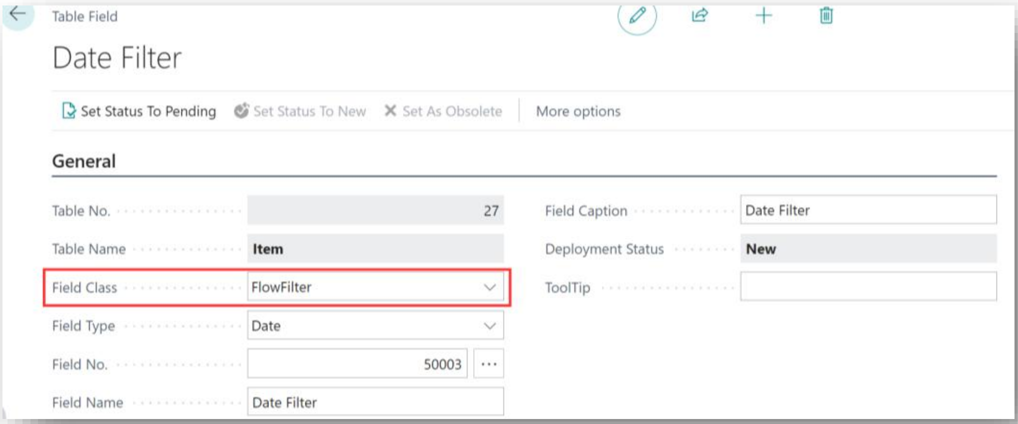


Figure 5-11

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 5-12)*.

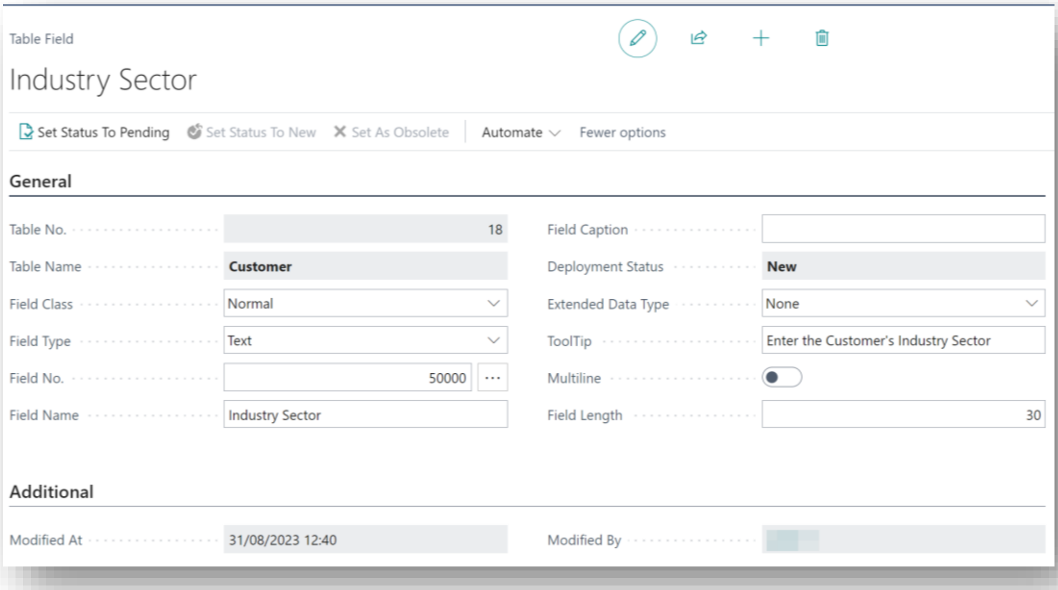


Figure 5-12

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 5-13)*.

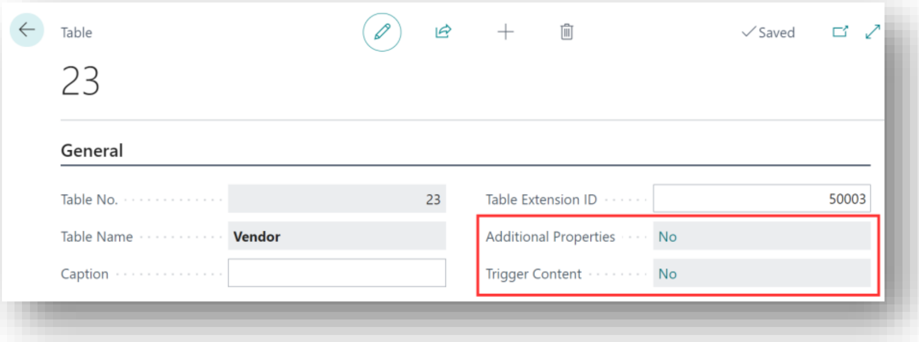


Figure 5-13

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 5-14)*. **Field Morphism** is discussed in detail in a separate section.

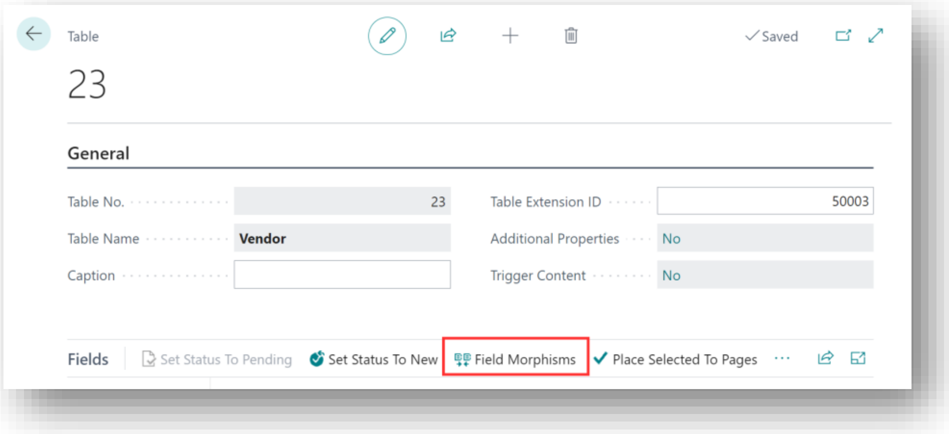


Figure 5-14

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 5-15)* 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**.

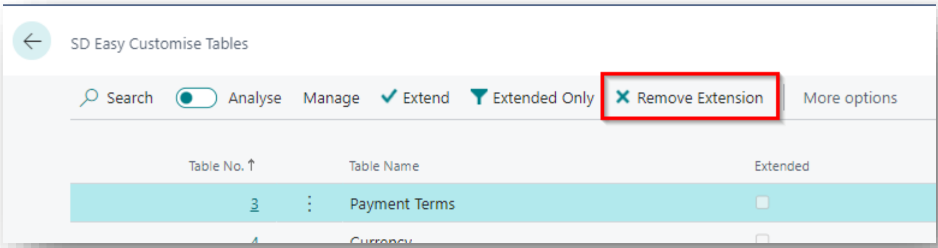


Figure 5-15

6 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.

6.1.1 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 6-1)*.

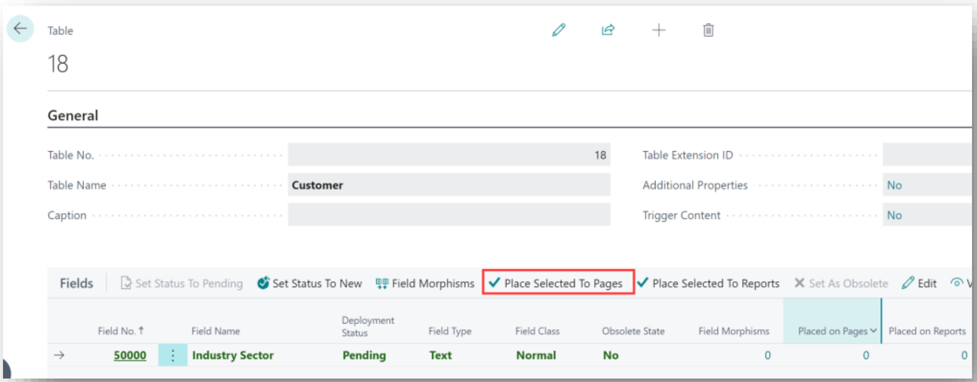
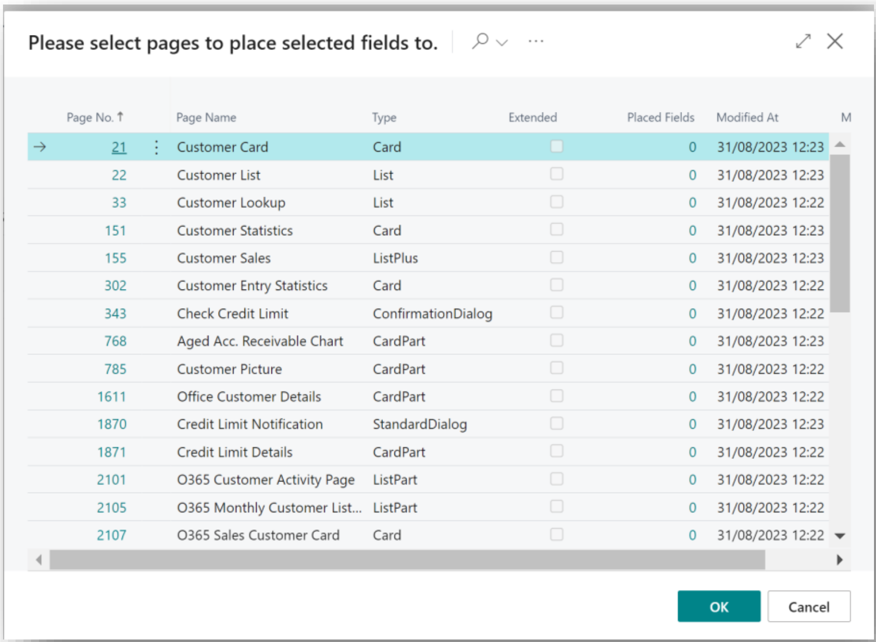


Figure 6-1

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 6-2)*. You can also select multiple pages at once.



Please select pages to place selected fields to.

Page No. ↑	Page Name	Type	Extended	Placed Fields	Modified At
21	Customer Card	Card	☐	0	31/08/2023 12:23
22	Customer List	List	☐	0	31/08/2023 12:23
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 12:23
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
2107	O365 Sales Customer Card	Card	☐	0	31/08/2023 12:22

OK Cancel

Figure 6-2

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 6-3)*.

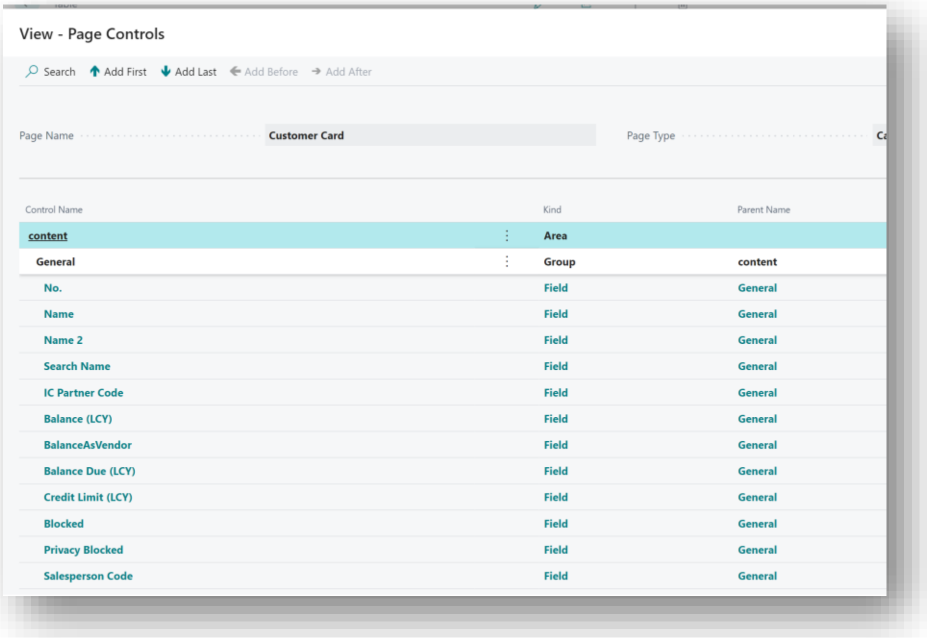


Figure 6-3

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 6-4)*.

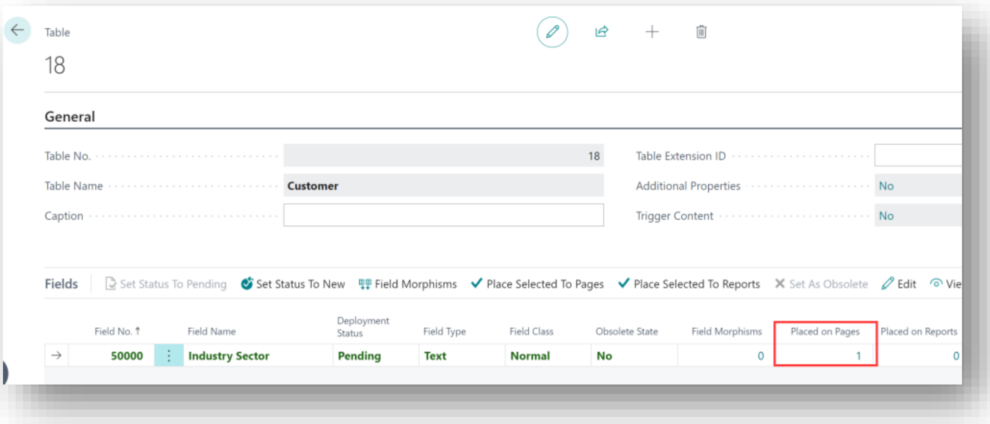


Figure 6-4

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 6-5)*.

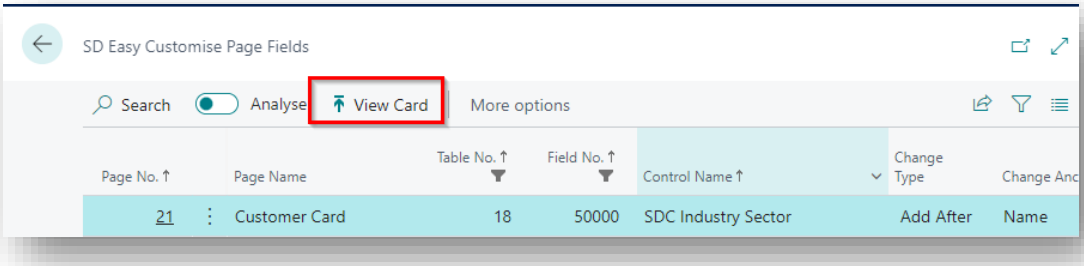


Figure 6-5

In the **Page** card you can set additional properties on the field controls that you have added to the card *(Figure 6-6)*. 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.

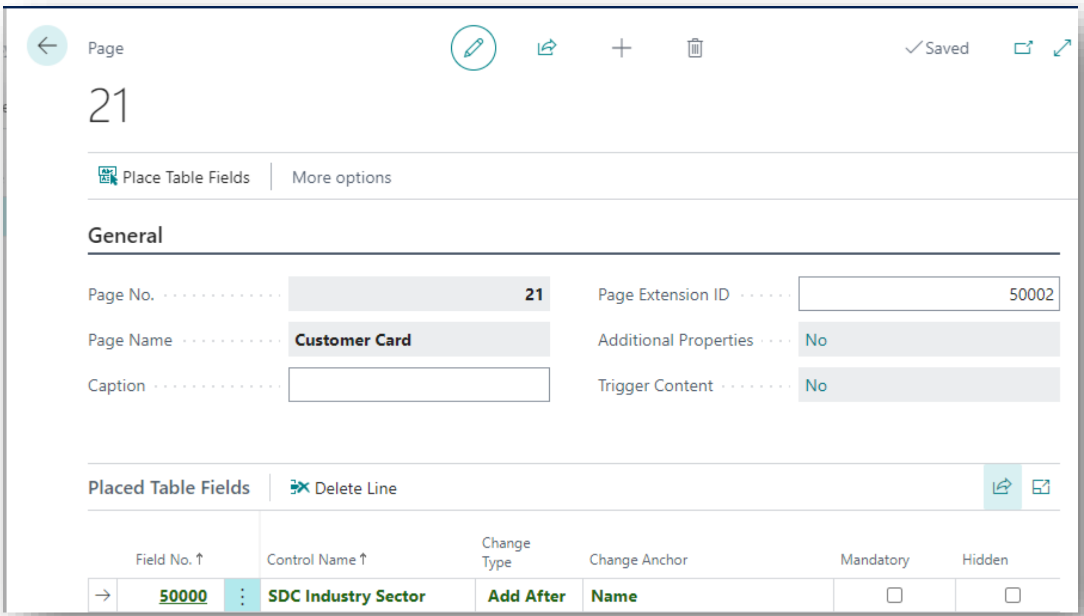


Figure 6-6

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 6-7)*.

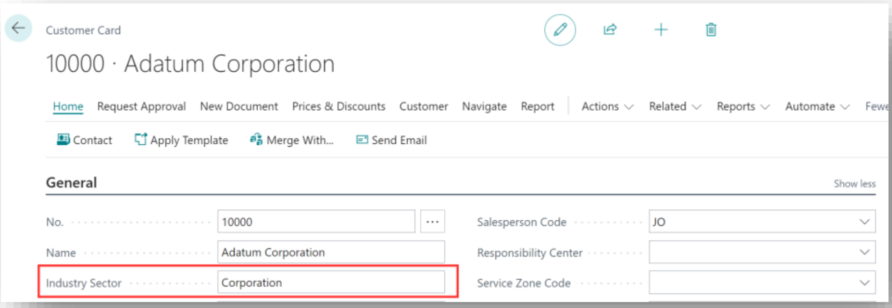


Figure 6-7

6.1.2 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 6-8)*.

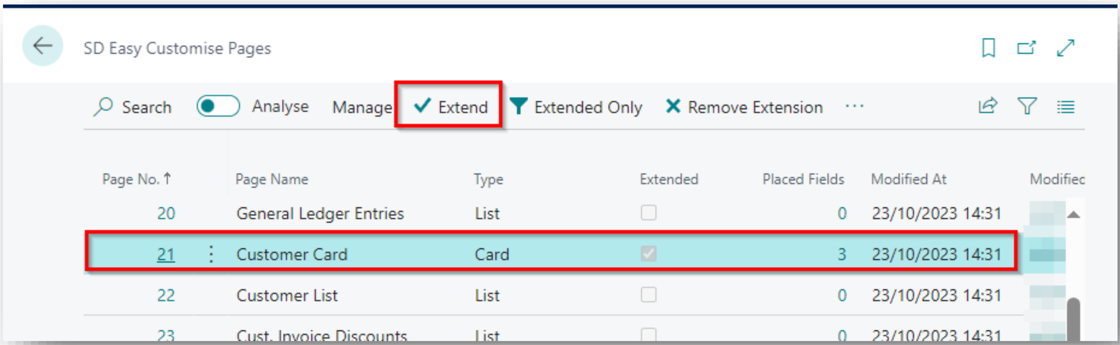


Figure 6-8

The **Page** card opens. Choose the **Place Table Fields** action *(Figure 6-9)*.

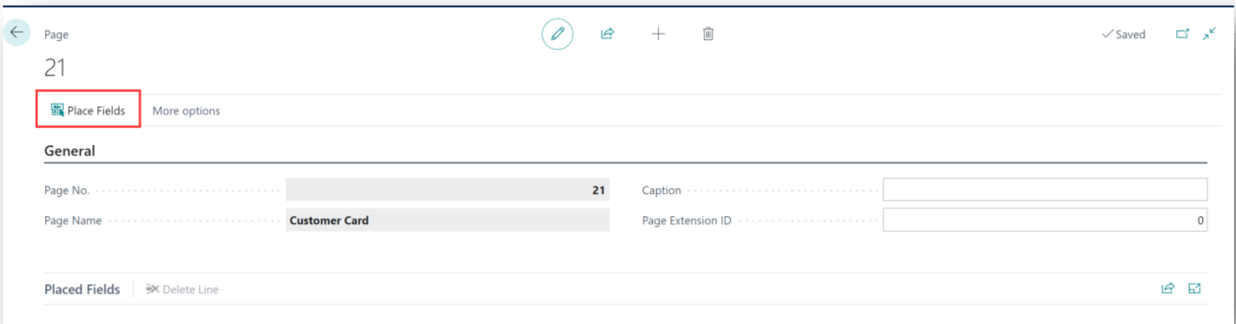


Figure 6-9

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 6-10)*.

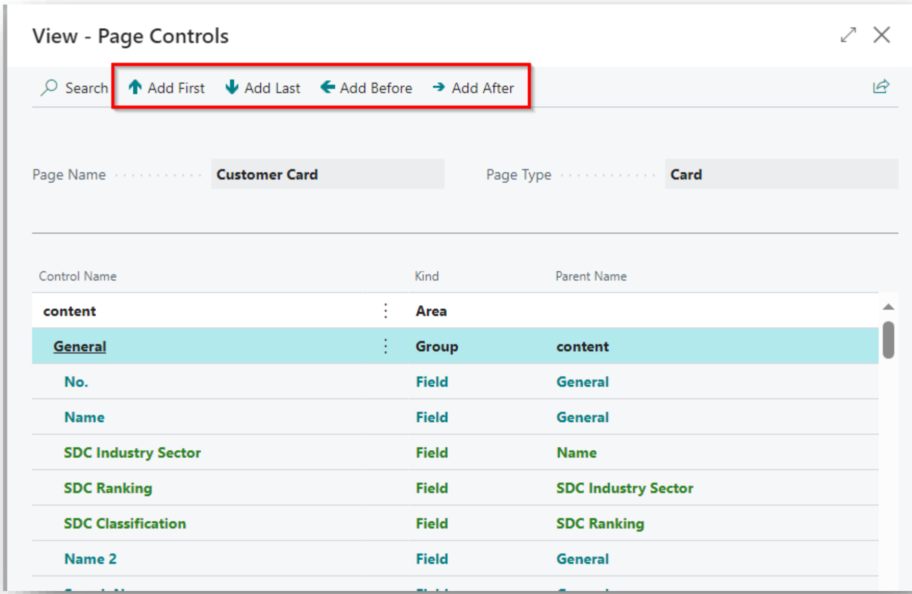


Figure 6-10

In the **Fields** page, select a field to add to the page and click **OK** *(Figure 6-11)*.

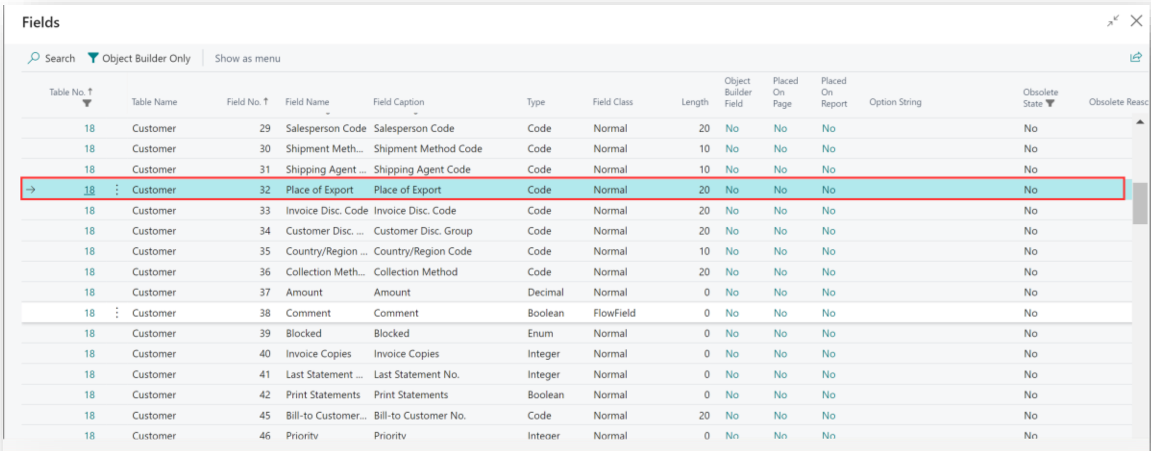


Figure 6-11

We can see that the selected field, in this example the Place of Export, is now appearing on the **Page Controls** page *(Figure 6-12)*. Close the **Page Controls** page.

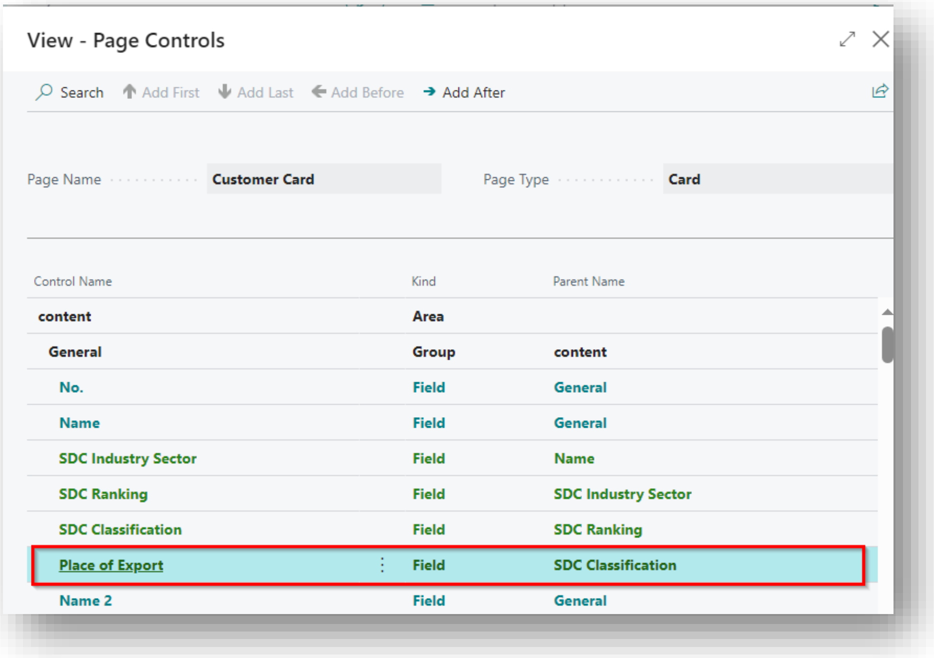


Figure 6-12

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 6-13)*.

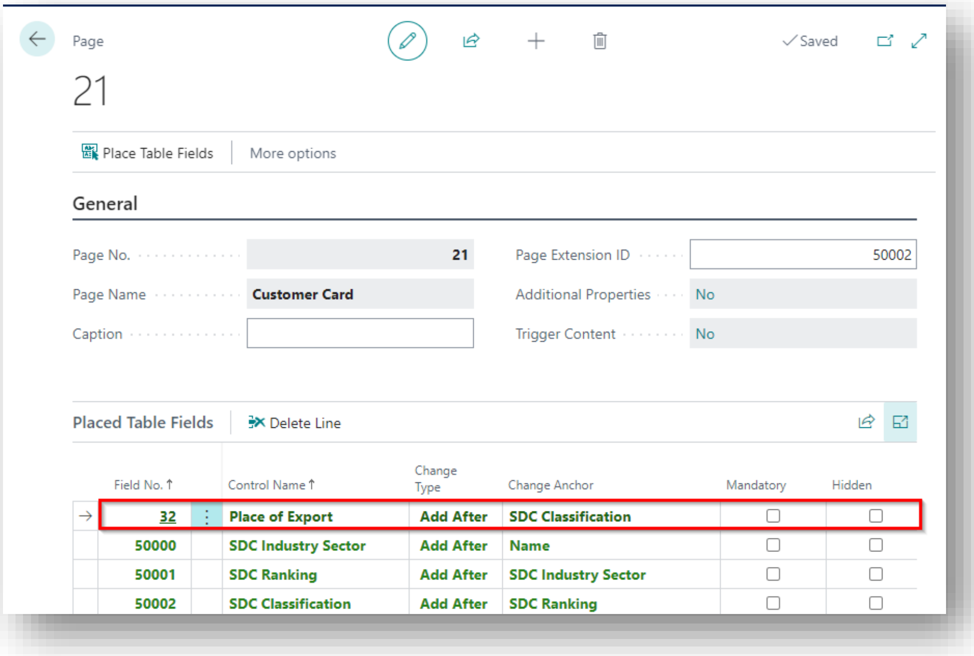


Figure 6-13

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 6-14)*.

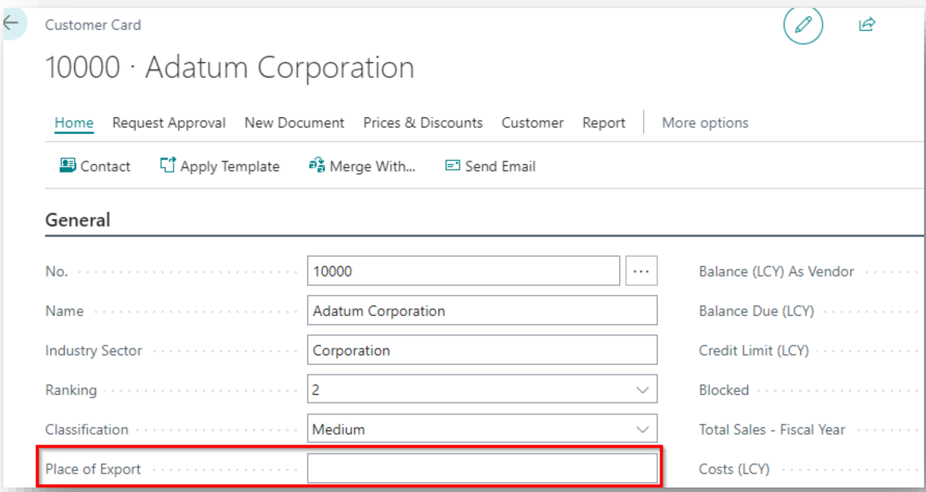


Figure 6-14

6.1.3 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 6-15)*.

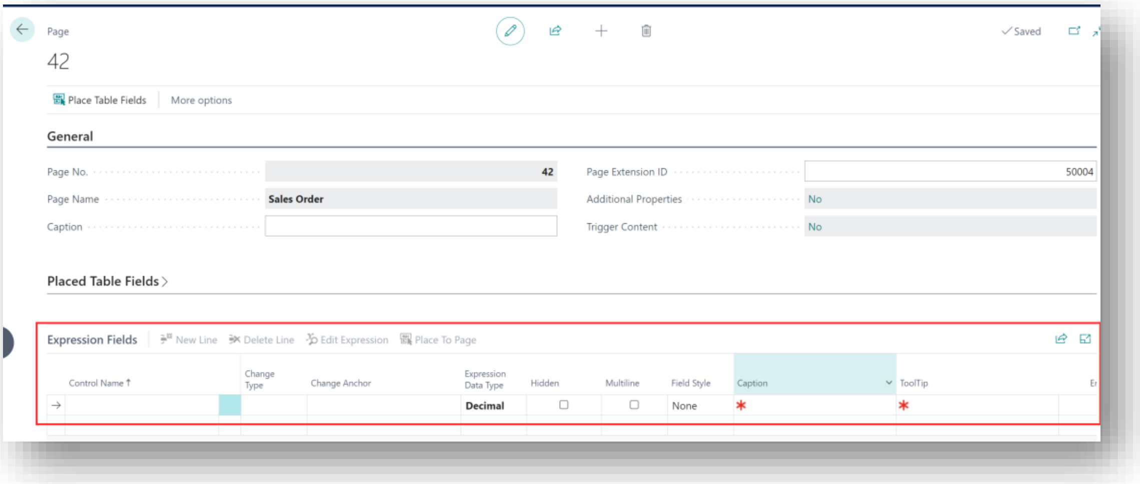


Figure 6-15

Navigate to the **Expression Fields** list part and enter a name for the control. Then choose the **Edit Expression** action *(Figure 6-16)*.

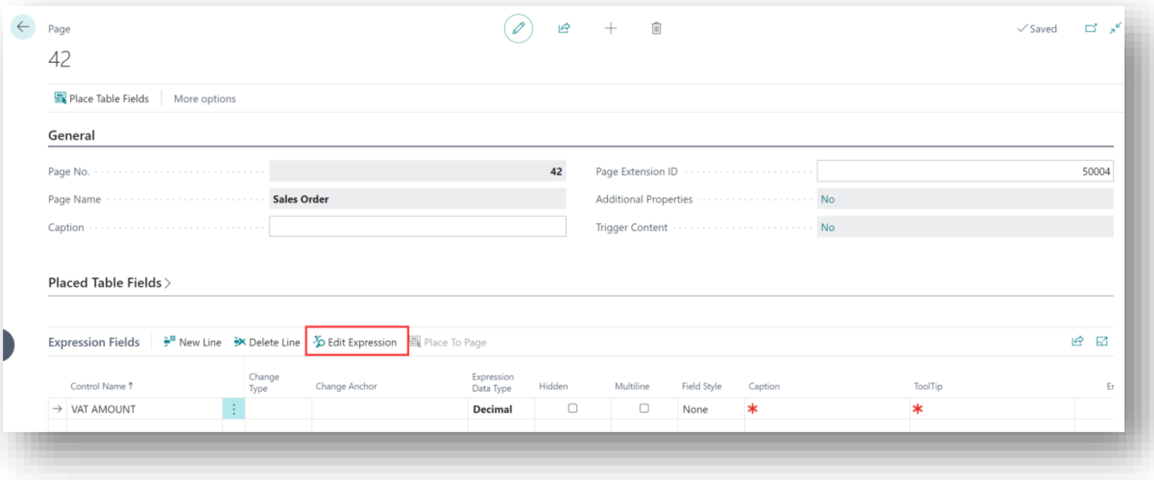


Figure 6-16

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 6-17)*. The validation of the code expression is limited to a check that the correct number of parentheses are present in the **Code Expression**.

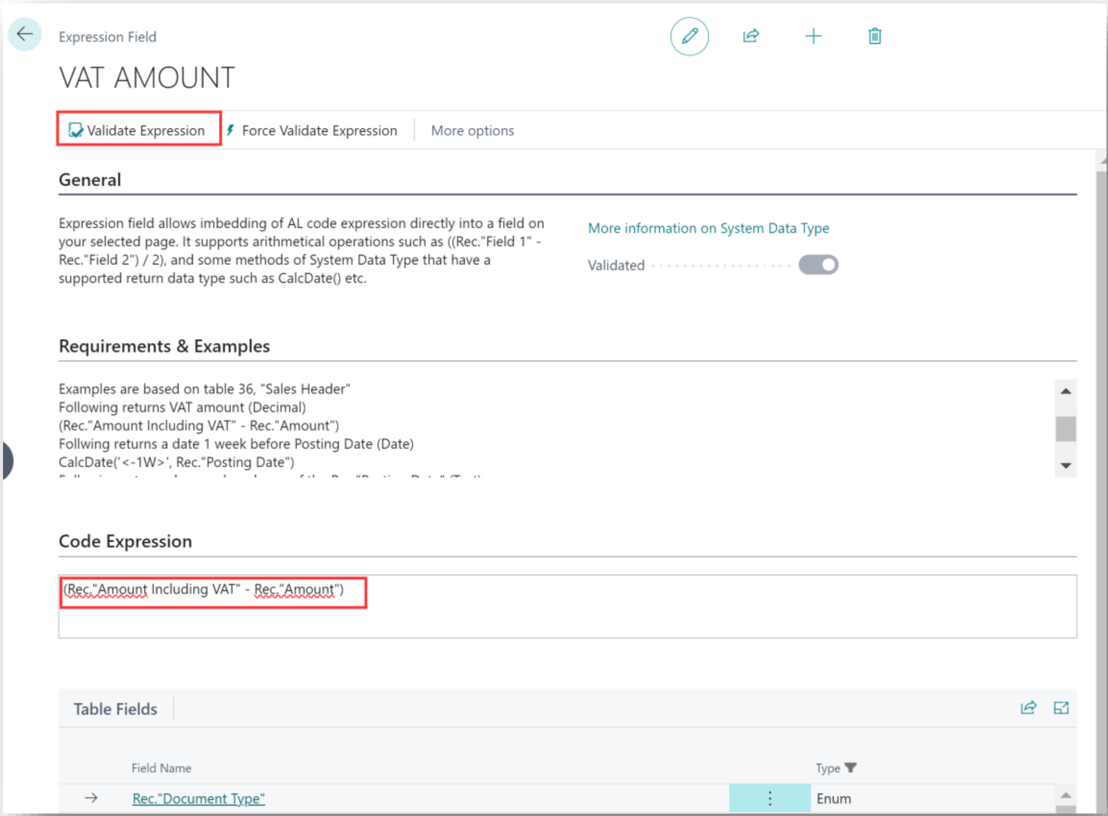


Figure 6-17

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 6-18)*.

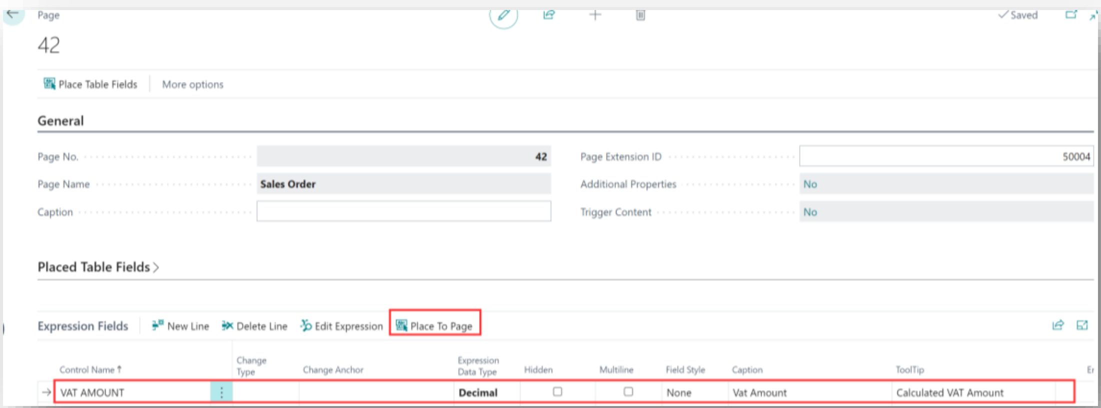


Figure 6-18

Place the expression field on to the page using the **Add First**, **Add Last**, **Add Before** or **Add After** actions *(Figure 6-19)*.

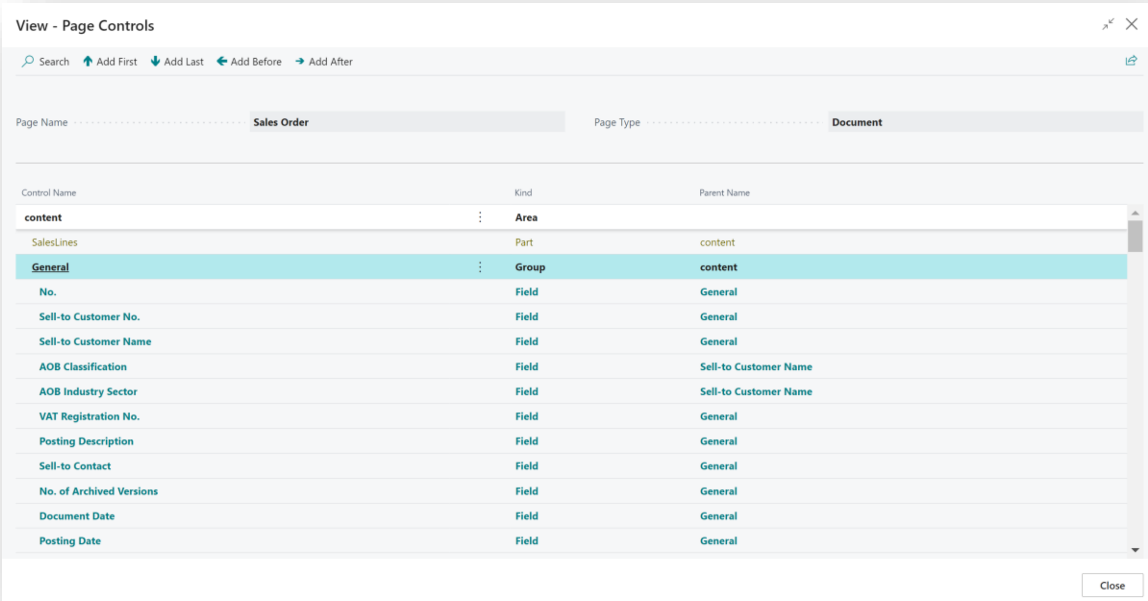


Figure 6-19

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 6-20)*.

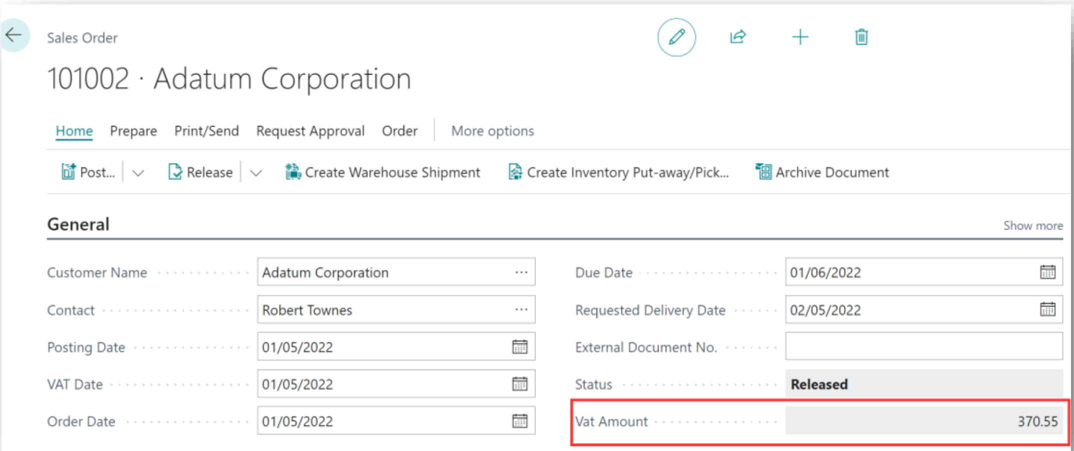


Figure 6-20

6.1.4 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 6-21)*.

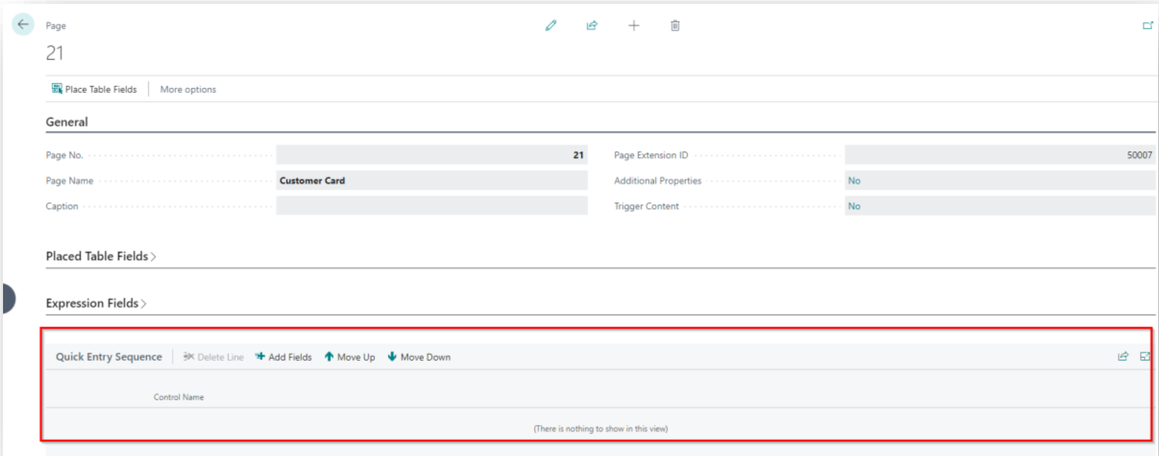


Figure 6-21

Navigate to the **Quick Entry Sequence** FastTab and chose the **Add Fields** action *(Figure 6-22)*.

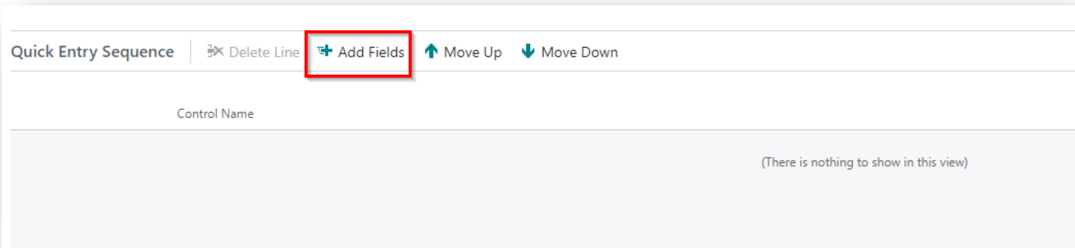


Figure 6-22

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 6-23)*.

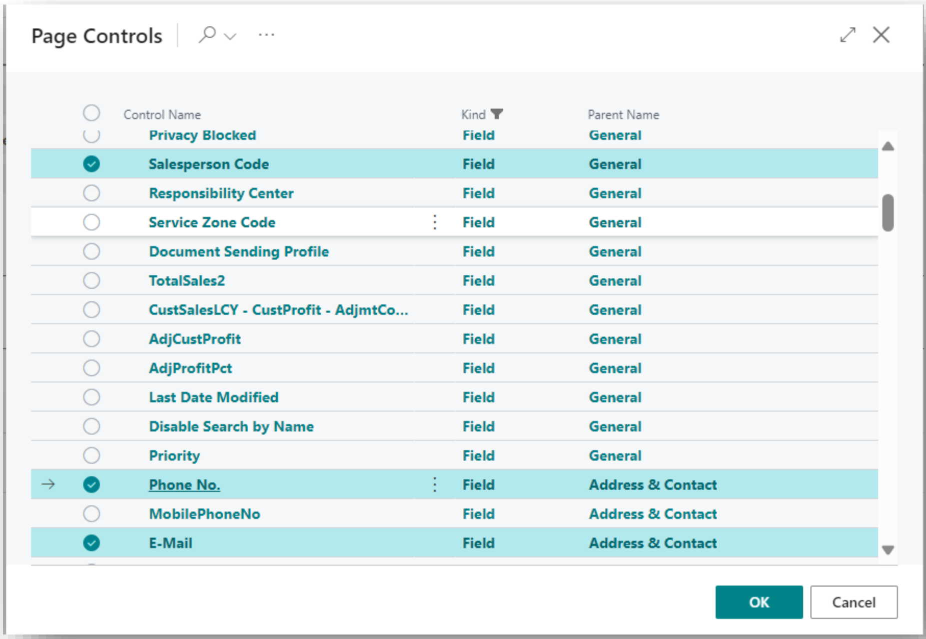


Figure 6-23

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 6-24)*.

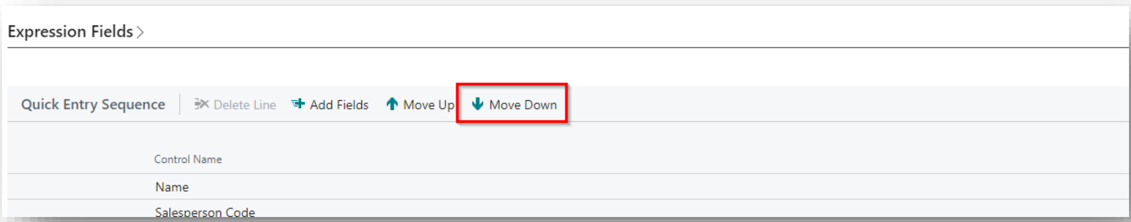


Figure 6-24

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 6-25)*.

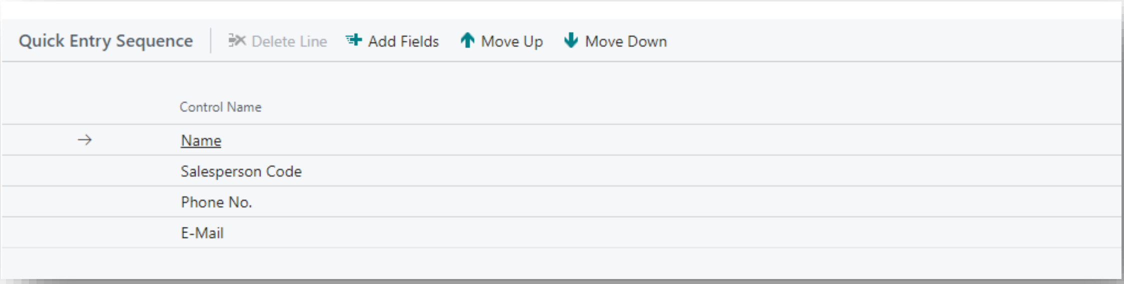


Figure 6-25

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 6-26)*.

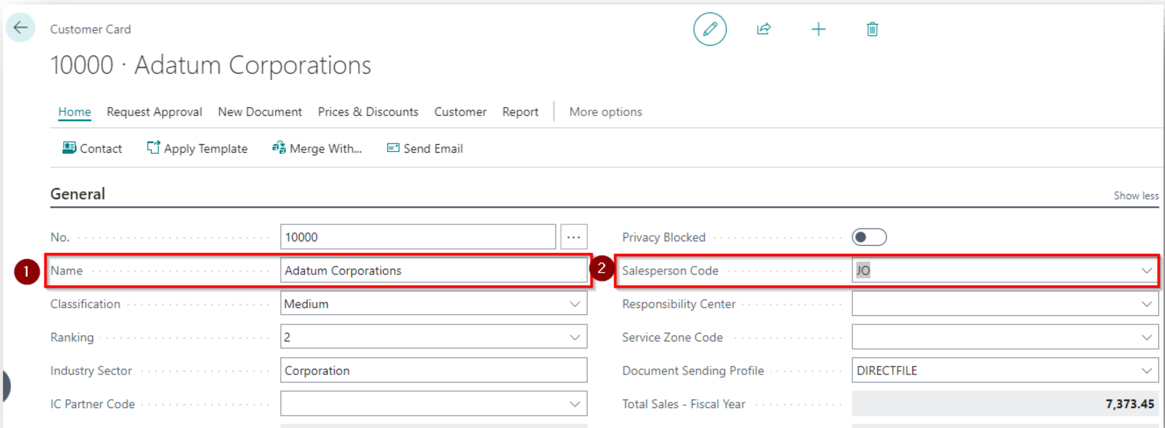


Figure 6-26

6.1.5 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 6-27)*.

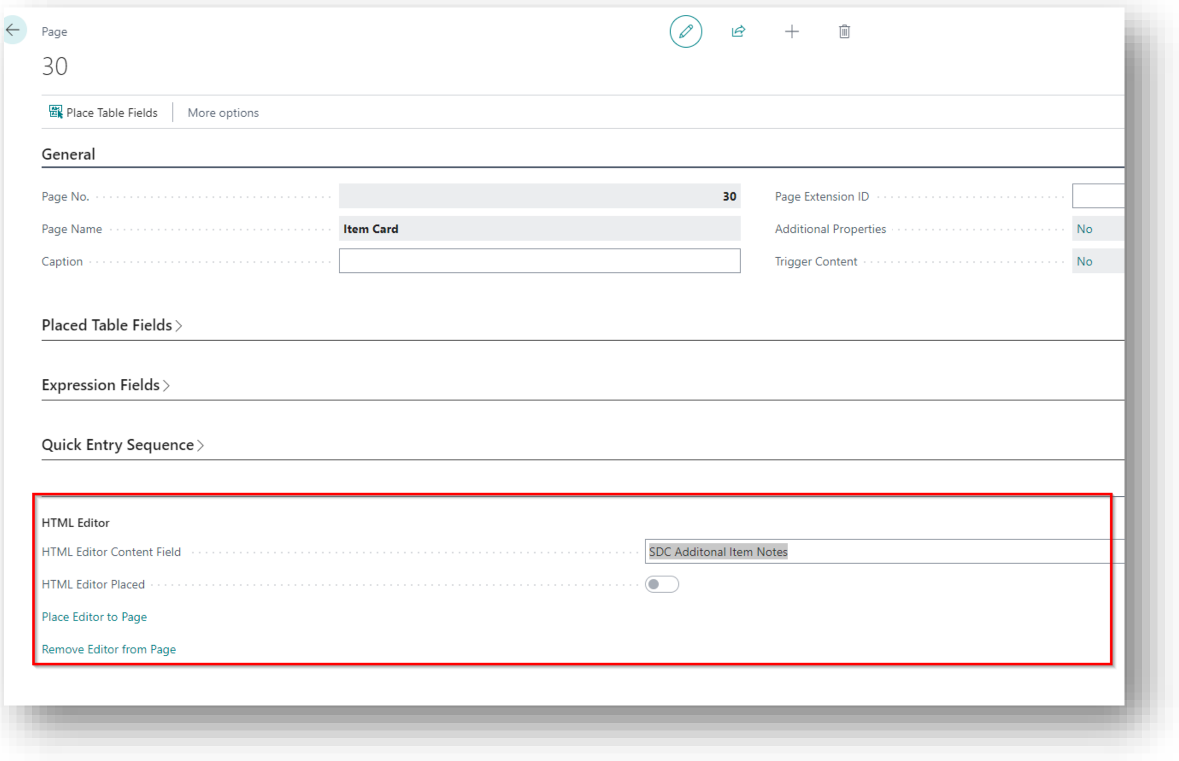


Figure 6-27

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 6-28)*.

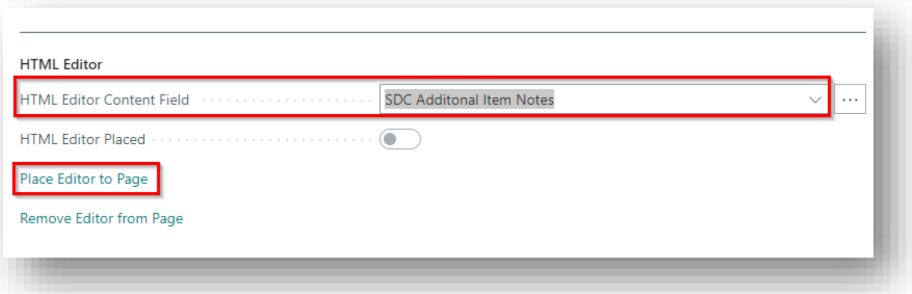


Figure 6-28

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 6-29)*.

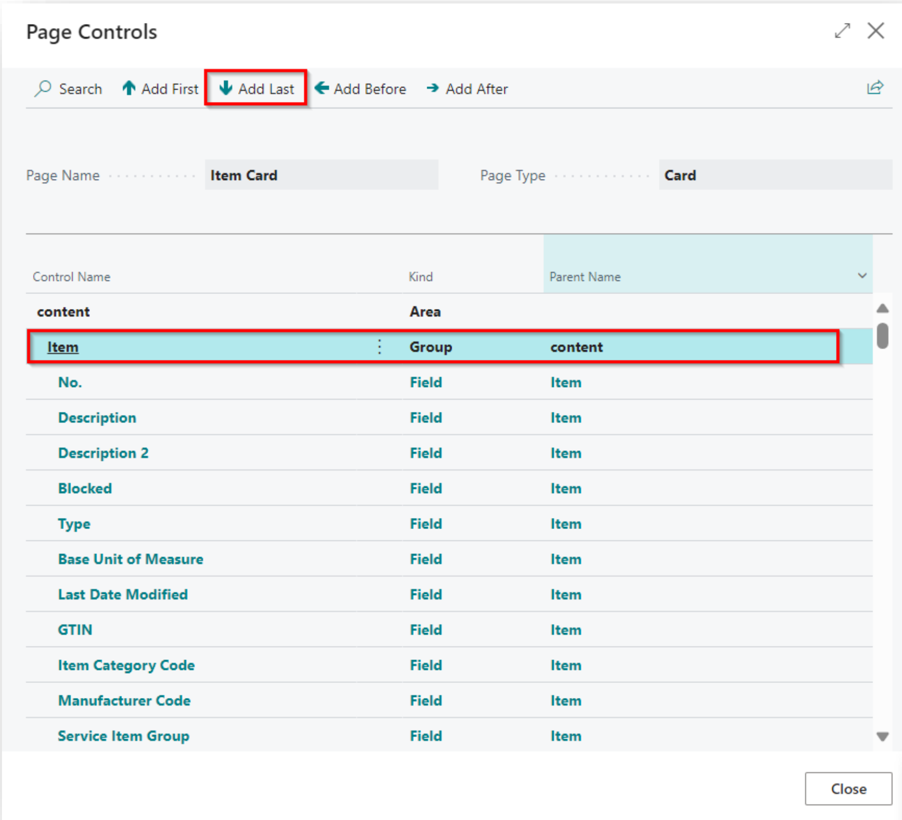


Figure 6-29

Back in the **HTML Editor** FastTab, the **HTML Editor Placed** is now set to yes *(Figure 6-30)*.

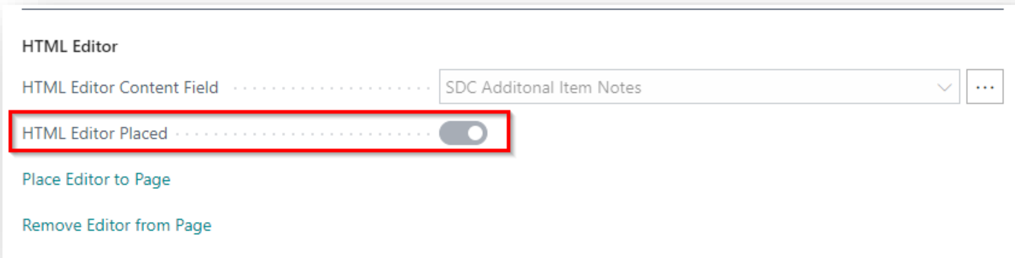


Figure 6-30

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 6-31)*.

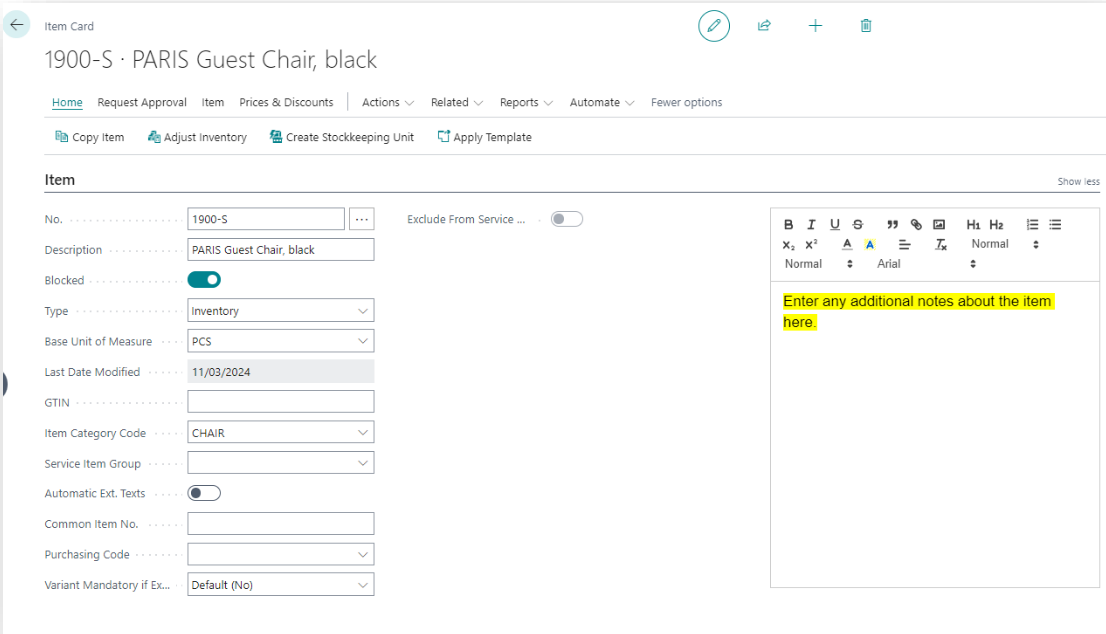


Figure 6-31

7 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 7-1)*.

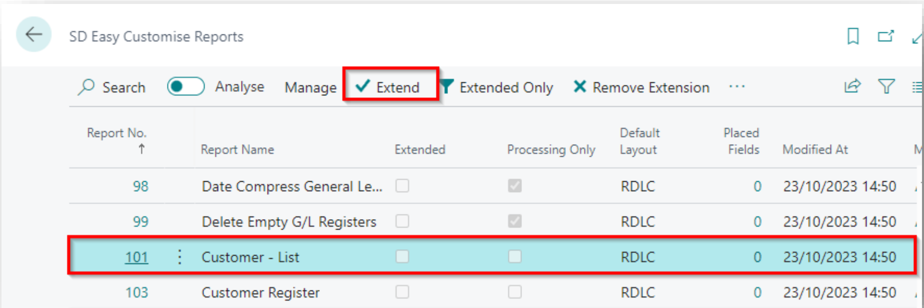


Figure 7-1

In the **SD Easy Customise Report** card, chose the **New Layout** action *(Figure 7-2)*.

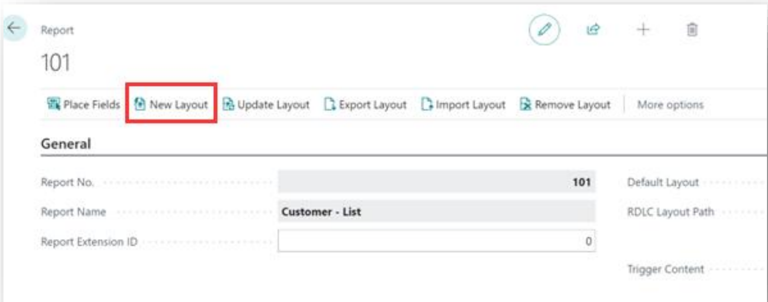


Figure 7-2

Select the **Place Fields** action to place fields on the report *(Figure 7-3)*.

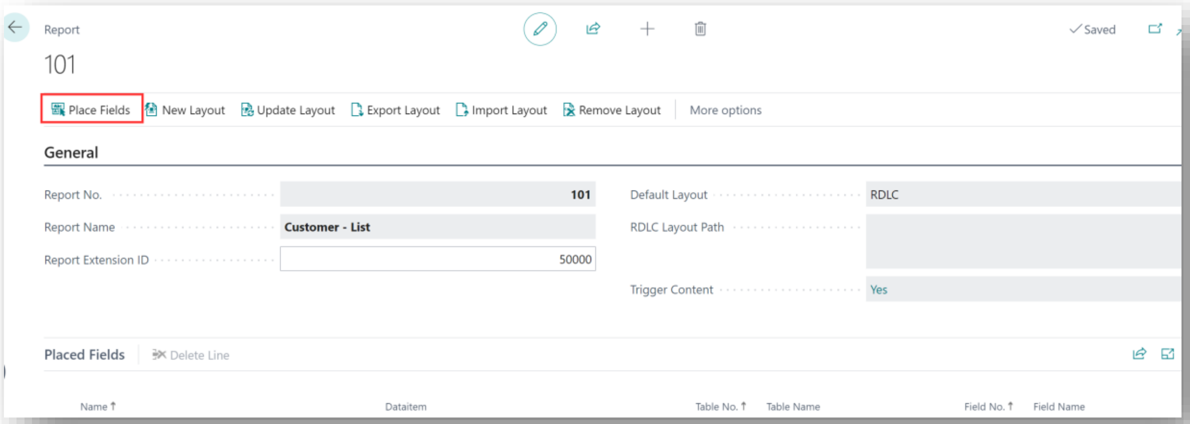


Figure 7-3

The **Report Controls** page opens. Select the **Add** action *(Figure 7-4)*.

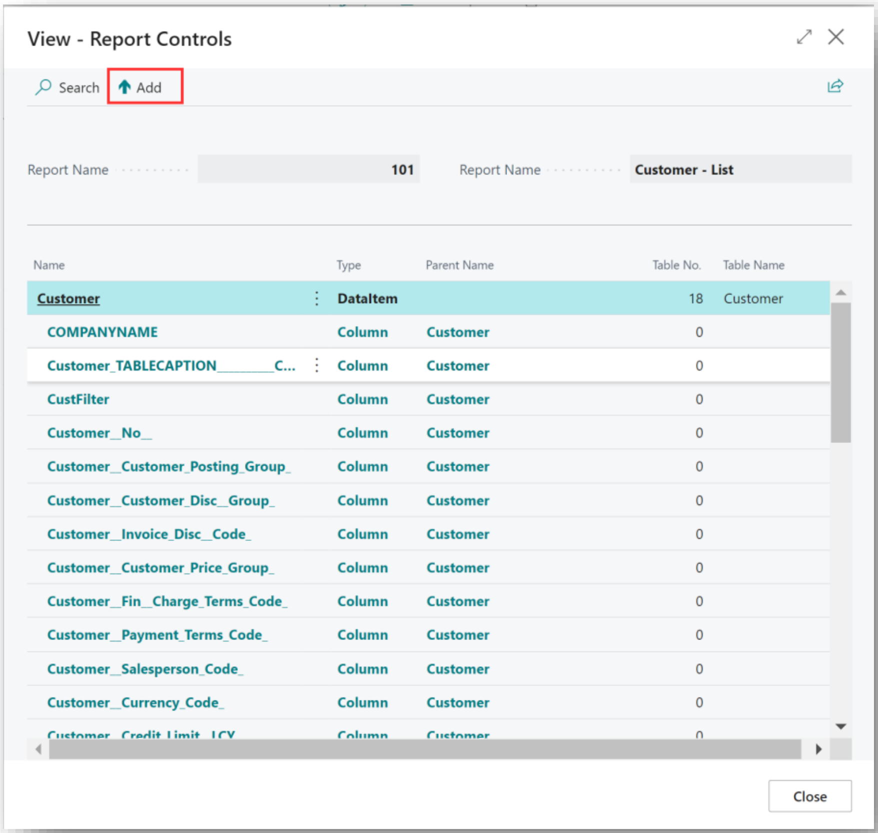


Figure 7-4

In the **From DataItem** page, choose the data item which the field that you want to place on the report will come from *(Figure 7-5)*.

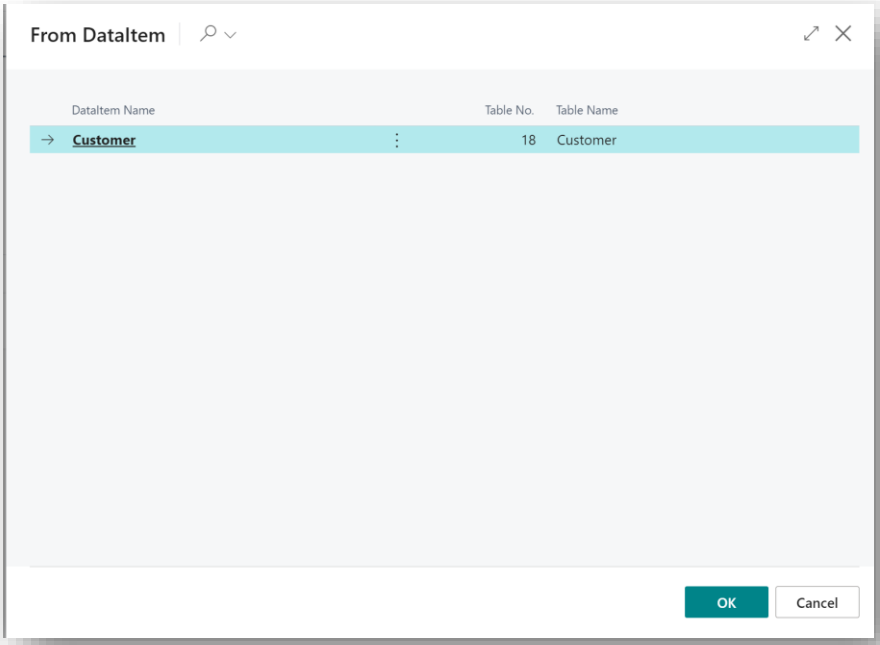


Figure 7-5

Scroll down in the **Fields** list and select the required field. Choose **OK** to close the **Fields** list *(Figure 7-6)*.

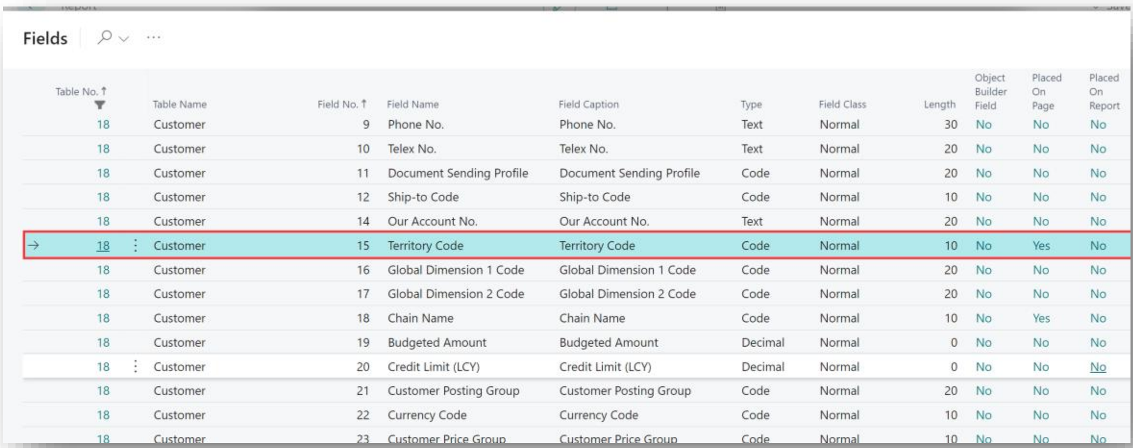


Table No.	Table Name	Field No.	Field Name	Field Caption	Type	Field Class	Length	Object Builder Field	Placed On Page	Placed On Report
18	Customer	9	Phone No.	Phone No.	Text	Normal	30	No	No	No
18	Customer	10	Telex No.	Telex No.	Text	Normal	20	No	No	No
18	Customer	11	Document Sending Profile	Document Sending 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
18	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

Figure 7-6

In the **Report Controls** list you can see the newly placed field *(Figure 7-7)*. Close the **Report Controls** page.

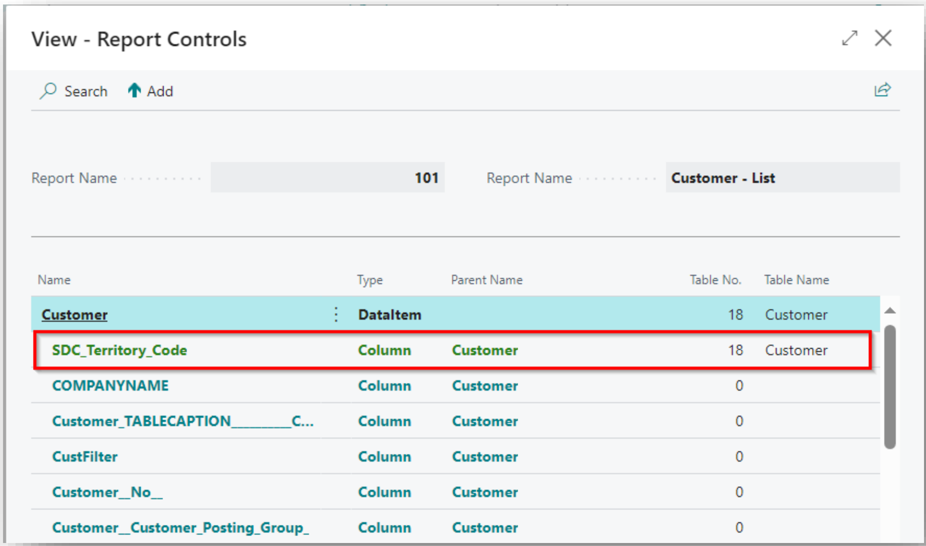


Figure 7-7

Back in the **Report** card, choose the **Update Layout** action to update the layout *(Figure 7-8).*

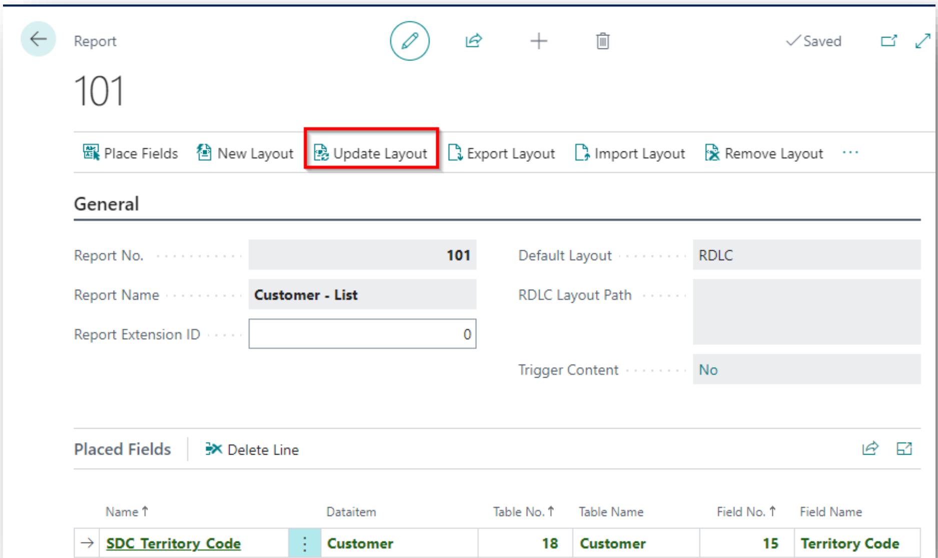


Figure 7-8

Choose the **Export Layout** action to export and edit the report layout in a Report Layout Editor of your choice *(Figure 7-9)*.

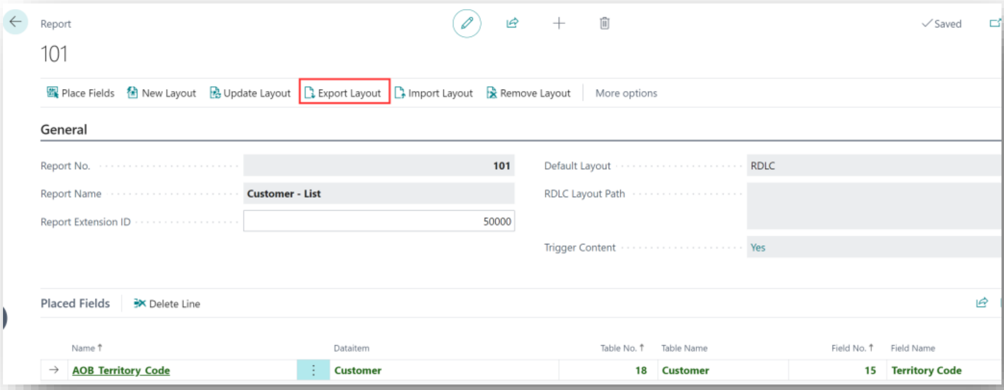


Figure 7-9

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 7-10)*.

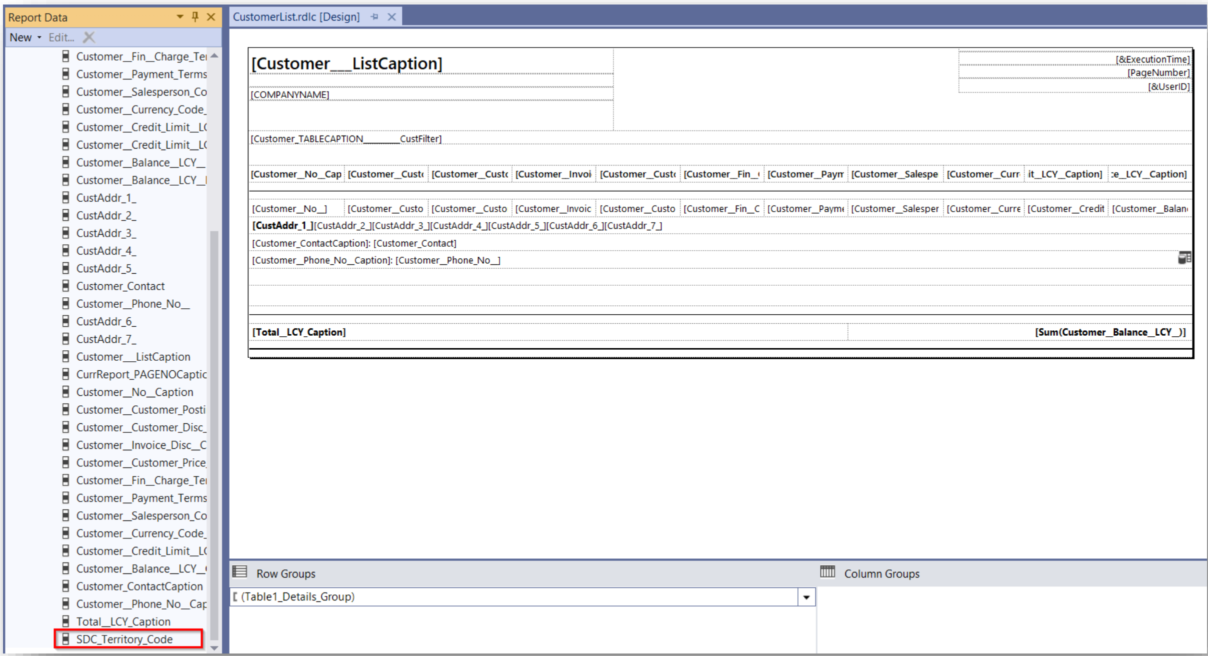


Figure 7-10

Place the field on the report layout and save your changes *(Figure 7-11)*.

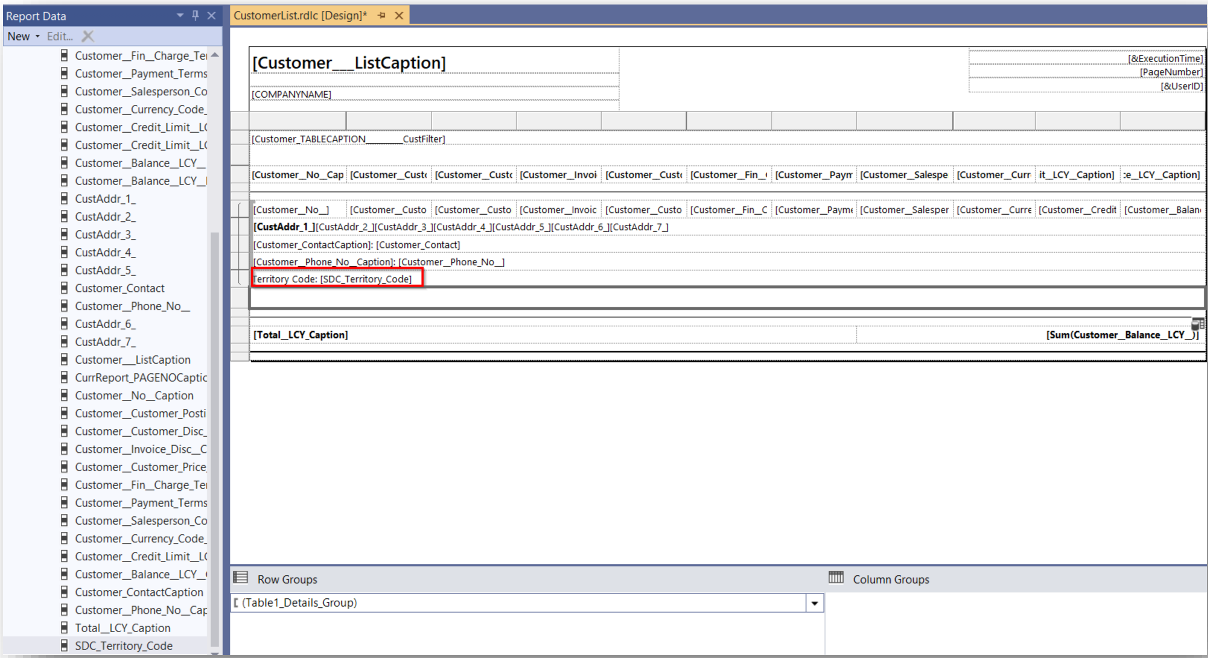


Figure 7-11

Back in SD Easy Customise, import the amended report layout *(Figure 7-12)*.

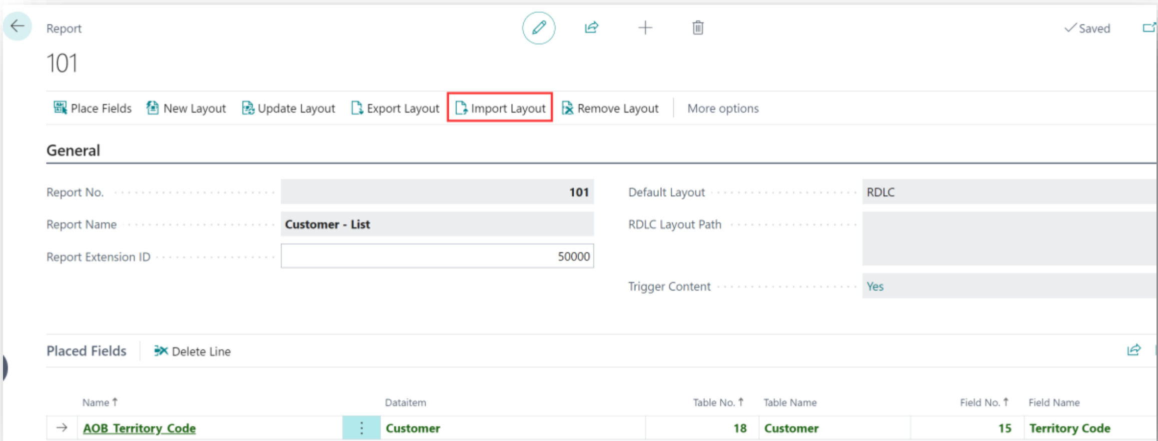


Figure 7-12

Your new layout has imported and the **RDLC Layout Path** is updated *(Figure 7-13)*.

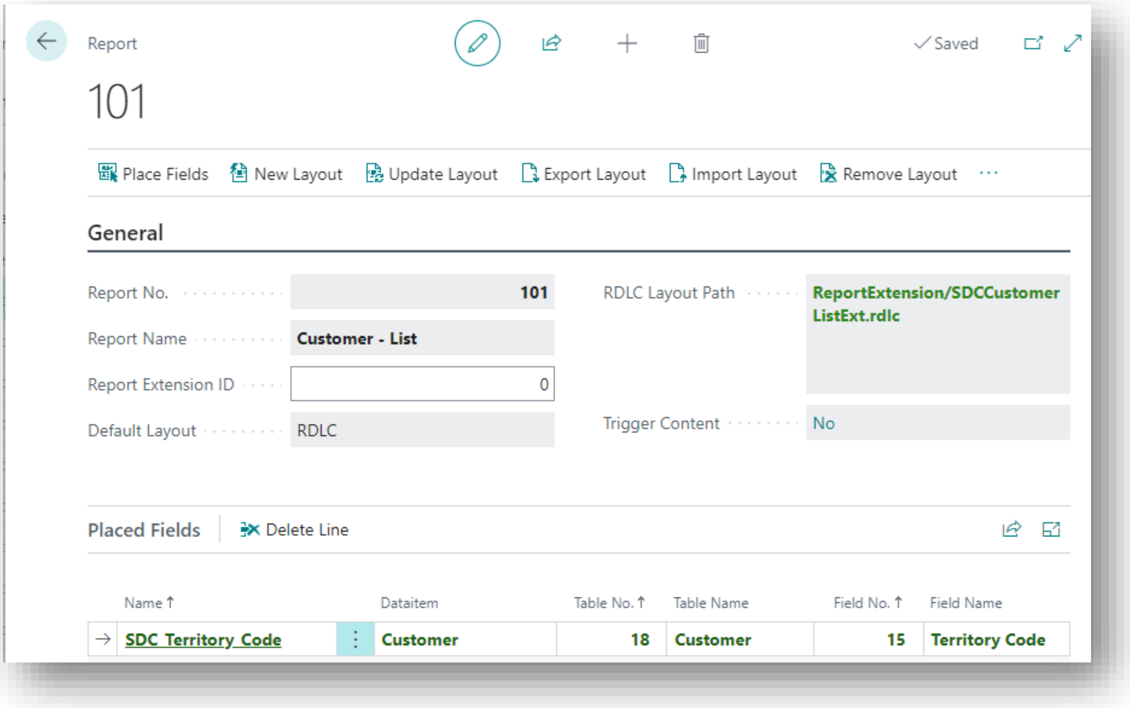


Figure 7-13

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**.

8 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 8-1)*.

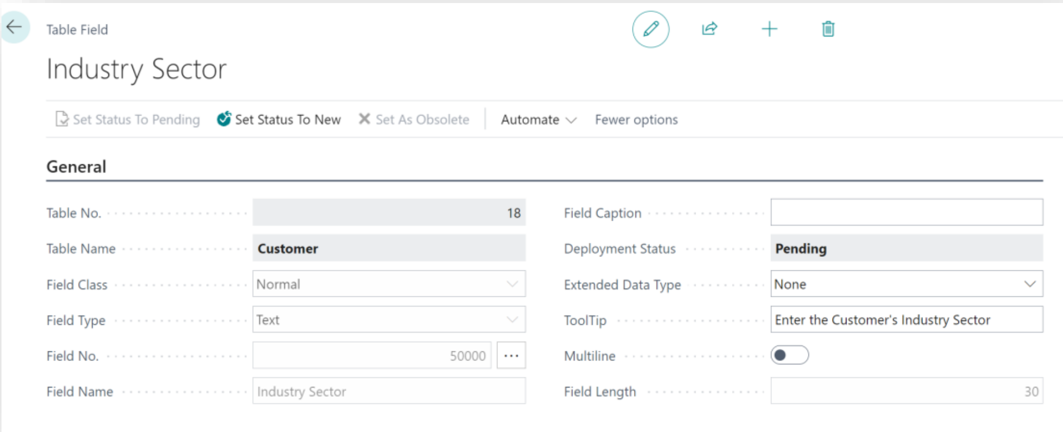


Figure 8-1

To morph the value of this Industry Sector field to other tables, select the **Field Morphisms** action in the **Table** card *(Figure 8-2)*.

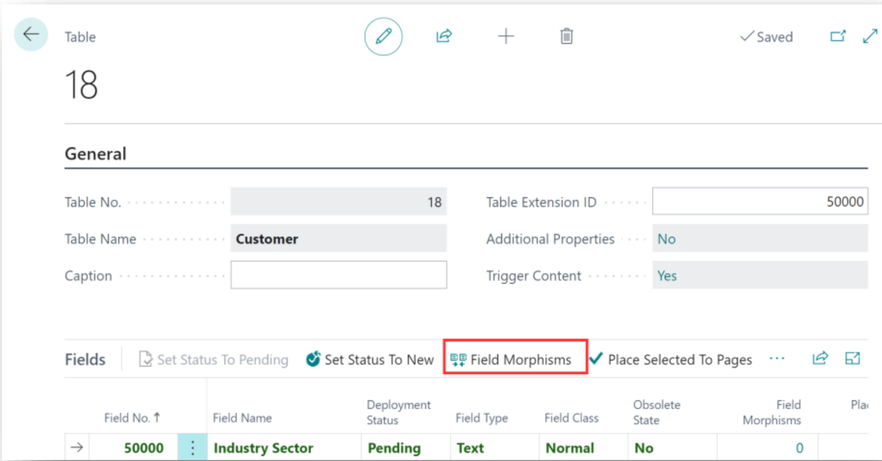


Figure 8-2

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 8-3)*.

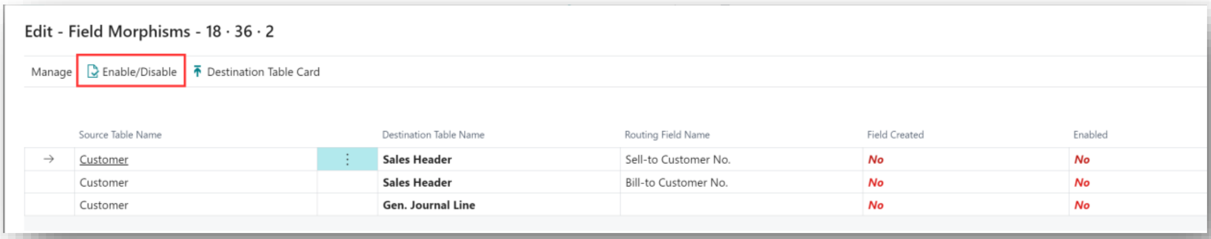


Figure 8-3

Choose **Yes** to create the Industry Sector field on the Sales Header table *(Figure 8-4)*.

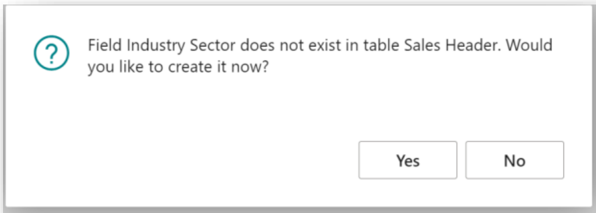


Figure 8-4

Choose the **Destination Table Card** action to open the Table that this field has been added to *(Figure 8-5)*.

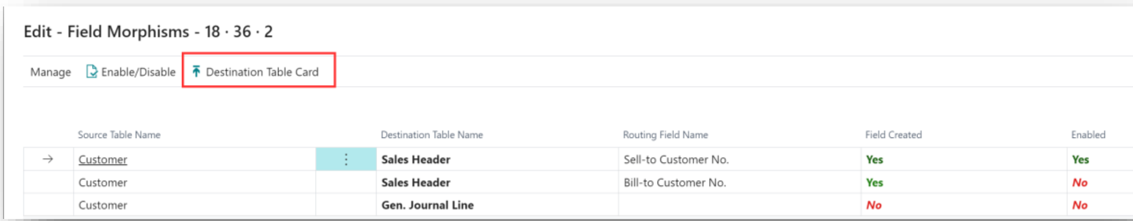


Figure 8-5

From here you can place the morphed field to the related Sales Header pages *(Figure 8-6)*.

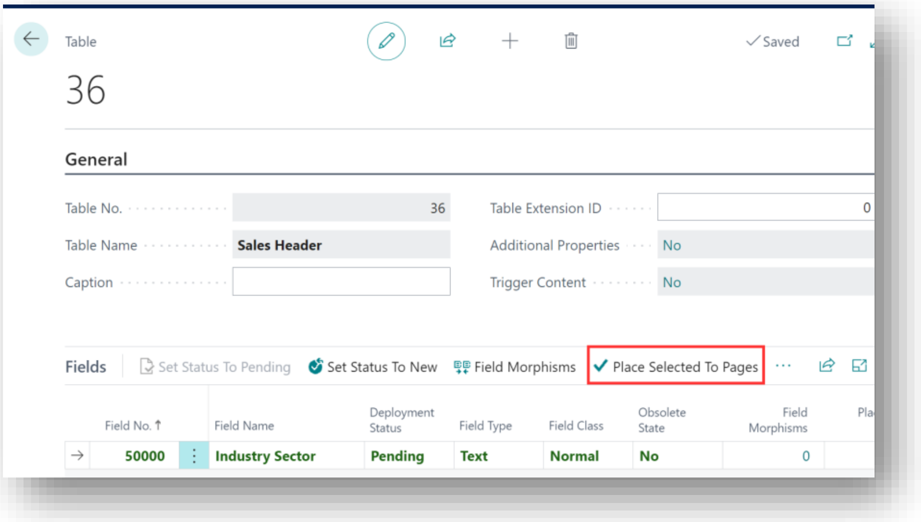


Figure 8-6

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 8-7)*.

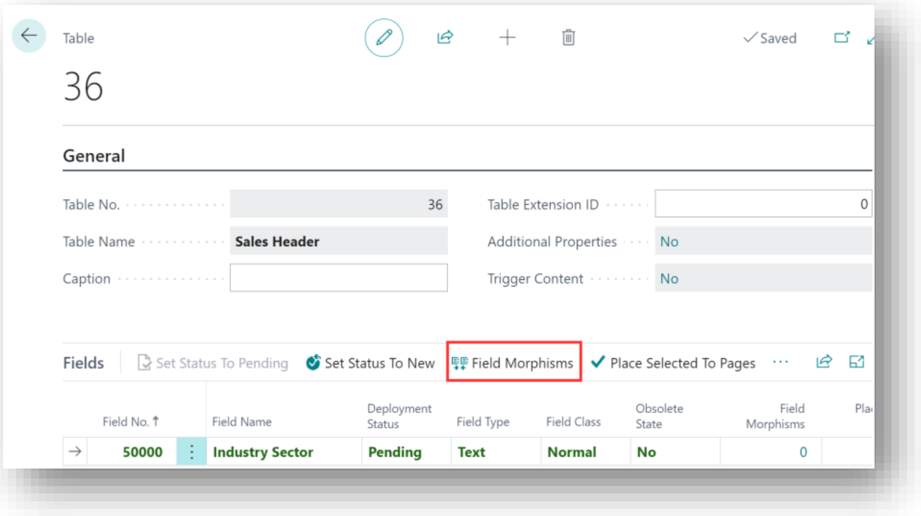


Figure 8-7

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	To
Standard Text		Sales Line
Standard Text		Purchase Line
G/L Account	Gen. Journal Line	G/L Entry

From	Routing	To
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
Item		Assembly Header
Item		Job Planning Line
Item		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	To
Purchase Line		Purchase Cr. Memo Line
Purchase Line		Purchase Line Archive
Sales Invoice Header		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 1

9 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 9-1)*.

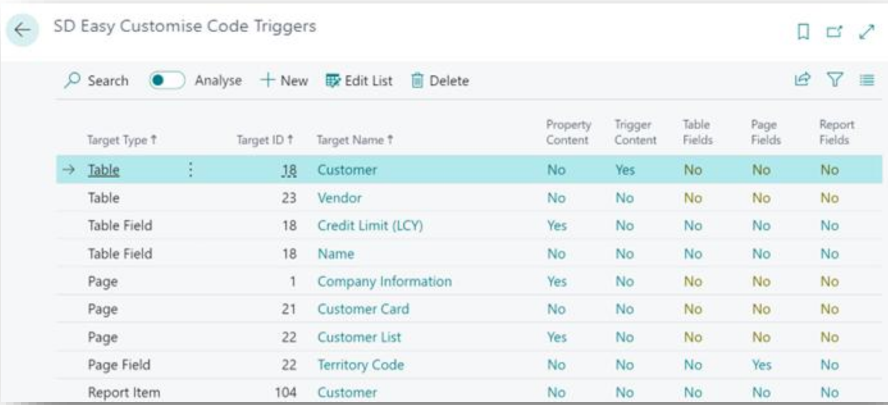


Figure 9-1

Drill in on the Property Content column where you can view existing or add new Additional Properties *(Figure 9-2)*.

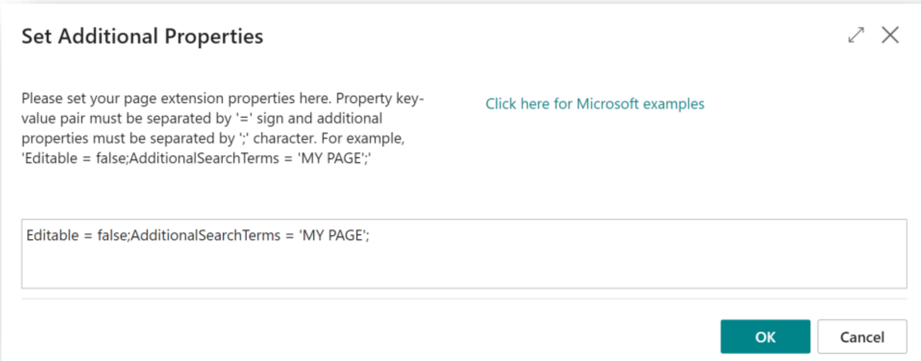


Figure 9-2

Drill in on the Trigger Content column where you can view existing or add new Trigger Code *(Figure 9-3)*.

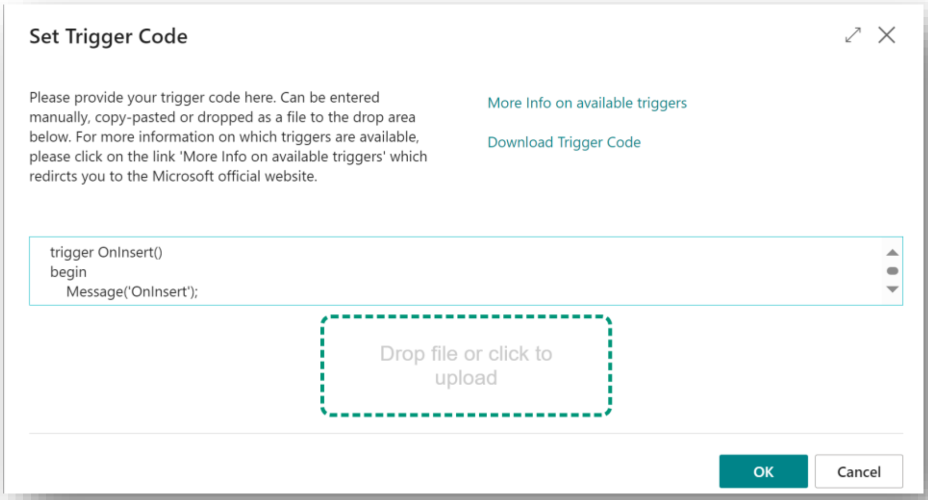


Figure 9-3

10 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 10-1)*.

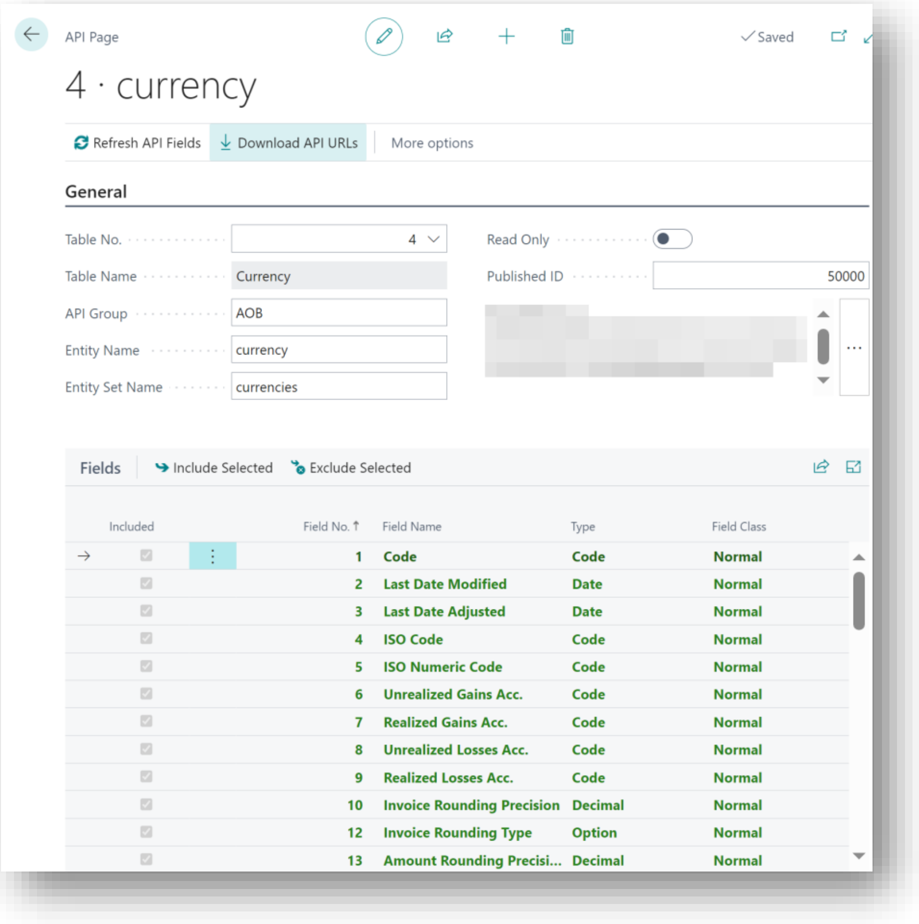


Figure 10-1

11 SD Easy Customise – Downloading and Publishing the Extension App

To publish the extension app in your Sandbox environment, navigate to the **SD Easy Customise Setup**. From the **Related** menu group, choose the **Publish Extension App** action. The extension app is created and published in your Sandbox environment.

To publish the extension app in your Production environment, choose the **Download Extension App** action. Install and publish the extension app in your Sandbox environment for testing using Extension Management. When you have finished testing you can then install the extension app in your Production environment using Extension Management. You cannot publish the extension app directly into your Live environment, you can only download it. You can also commit your changes to GitHub or DevOps *(Figure 11-1)*.

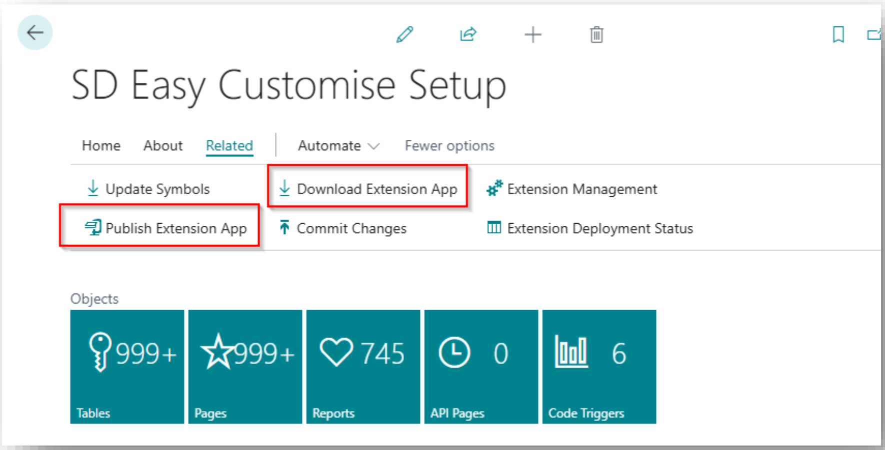


Figure 11-1

12 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 12-1)*.

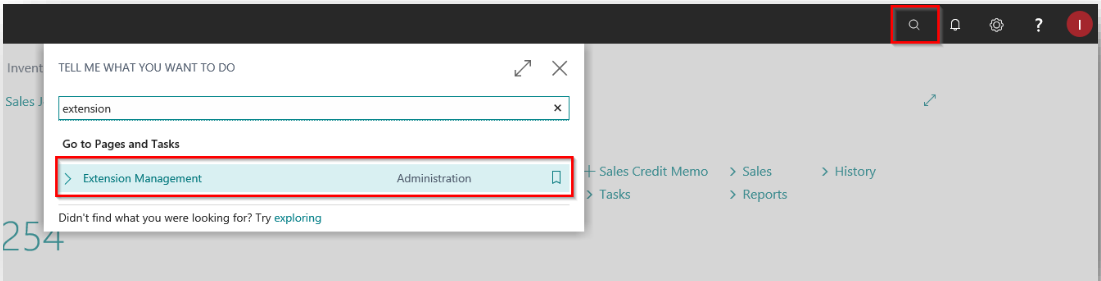


Figure 12-1

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 12-2)*.

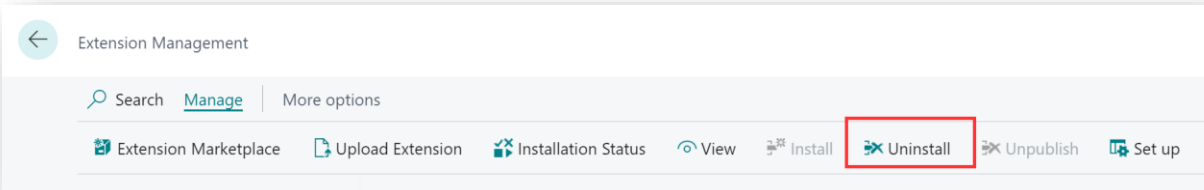


Figure 12-2

Dynamics
Shop

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Simply Dynamics

Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.

Dynamics Shop

DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.

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