



Custom Fields

Product Development - 2025-07-01 - Major Features

Overview

The **Custom Fields** feature in the Profit Max Platform application enables companies to introduce and utilize up to **10 custom-defined fields** from their source system. These fields will enhance data segmentation and reporting by appearing as columns within various grids and serving as segmentation options for various analytical features. Initially configured by **Cavallo employees**, these fields will eventually be configured directly by admins at the **company level** (not the individual user level).

This feature offers flexibility in mapping custom fields from different ERP systems, including **Dynamics GP**, **SalesPad**, and **Microsoft Business Central**, with plans to support **Dynamics 365 Finance & Operations (F&O)**.

Key Features

- **10 configurable custom fields per company:** Available in grids and as segmentation options.
- **ERP integrations:** Supports Dynamics GP, SalesPad, and Microsoft Business Central custom fields.
- **Granular control:** Custom fields tied to specific entities, ensuring relevant field availability in appropriate contexts.
- **Note:** Only custom fields with the data type of text or boolean will be available for segmentation.

Configuration Details

Cavallo employees will initially handle the configuration of these custom fields but will transition to **user-managed configurations** at the company level soon.

Supported ERP Systems and Field Sources

1. Microsoft Dynamics GP UDFs

- **Supported Entities:**

- Item Master
- Sales Document
- Customer
- Fields are derived from the static **user-defined fields (UDFs)** that are GP-Only.

2. SalesPad UDFs

- **Supported Entities:**
 - Item Master
 - Sales Document
 - Sales Line Item
 - Customer

3. Microsoft Business Central Custom Fields

1. Supported Entities:

- Item Master
- Invoice Header
- Invoice Line
- Customer

2. Supported Fields:

- Custom fields created by **third-party applications** within Business Central.
- Custom fields created by the **Cavallo Custom Fields** application.

3. Mapping Requirement:

- Fields must be mapped via **Cavallo's Custom Field application**, managed within **Cavallo Cloud**.

4. Dynamics 365 Finance & Operations (F&O)

- **Status:** Support planned; specific details TBD.

Field Availability in Profit Max Platform

The availability of each custom field depends on the **type of entity** to which it is tied. The following rules govern where and how custom fields appear in the application:

- **Sales Document Custom Fields:** Available in grids containing **Sales Document Number/ID**.
- **Item Custom Fields:** Available in grids containing **Item Number**.
- **Customer Custom Fields:** Available in grids containing the **Customer Number**.
- **Sales Line Item Custom Fields:** Available in grids containing the **Sales Line Item ID**.

Integration with Analytical Modules and Widgets

Custom fields will also be integrated into widgets supporting segmentation within Profit Max Platform, allowing for more granular reporting:

Sales, COGS, and Margin Modules, plus Margin Variance Analysis:

Custom fields will appear in the list of segment options, providing additional segmentation options based on the field type and entity.

Field Type Limitations

- **Only non-numeric fields** (such as boolean or text fields) are available for segmentation.
- Numeric custom fields will not be available for segmentation, although they can still appear as columns in grids.

Conclusion

The **Custom Fields** feature allows companies to extend the power of Profit Max Platform by introducing additional, tailored fields from their ERP systems. This enhancement allows for more precise data analysis and segmentation while maintaining flexibility for future growth. With future updates, companies will be able to manage these custom fields independently, providing even greater control over their analytical capabilities.