



Mission Control: Custom Fields

Megan De Freitas - 2024-11-22 - Mission Control Documentation

How to install Custom Fields

To begin working with custom fields the Cavallo Core Connector will need to be installed in BC. Steps to do this can be found here.

Once it has been installed, the licensing will need to be configured for the organization. To ensure that this is in place, please connect with the Cavallo Support team.

Where to find Custom Fields

Navigate to the top right of the Cavallo app

The screenshot shows the Cavallo app interface. At the top, there is a dark navigation bar with the following items: Mission Control, Customers, Documents, Products, and a plus sign. On the far right of this bar is a user profile icon labeled 'JL' with a dropdown arrow. A red arrow points to this icon. Below the navigation bar, there is a status bar showing 'All Workflows' (with a dropdown), 'Last updated Less than a min ago Refresh', 'Total Documents 255', 'Cost \$917,377.20', and 'Total \$1,250,307.85'. The main content area is divided into two columns. The left column contains 'Approvals (3)' and 'Workflows (14)', each with a search bar and a list of items. The right column contains a search bar and two tables. The top table is titled 'Documents need approval' and has columns for DOC NUMBER, CUST. PO NUMBER, CUSTOMER, DOC DATE, and STATUS. Below it is a table with a collapsed row for 'Margin Validation <10% (3)'. The bottom table is also titled 'Documents need approval' and has the same columns. It has several collapsed rows: 'New Quote (5)', 'Create Order (0)', 'New Order (18)', 'Order Details (3)', and 'Waiting for Payment (1)'. In the top right corner of the main content area, there is a settings menu icon (a gear) with a dropdown arrow, which is highlighted by a red arrow.

Select Settings from the menu

Mission Control Customers Documents Products + JL

All Workflows Last updated Less than a min ago Refresh Total Documents 255 Cost \$917,377.20

Switch company Jeff Lambert - Cronus

Settings Workflows Log Out

Approvals (3)

Search by Your Reference Type to Search

Documents need approval

DOC NUMBER	CUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS
Margin Validation <10% (3)				

Workflows (14)

Search

Select All

Quote Workflow Order Workflow

DOC NUMBER	CUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS
New Quote (5)				
Create Order (0)				
New Order (18)				
Order Details (3)				
Waiting for Payment (1)				

Then select the new "Custom Fields" setting to start inputting new fields.

Mission Control Customers Documents Products + JL

Settings > Emails

Settings

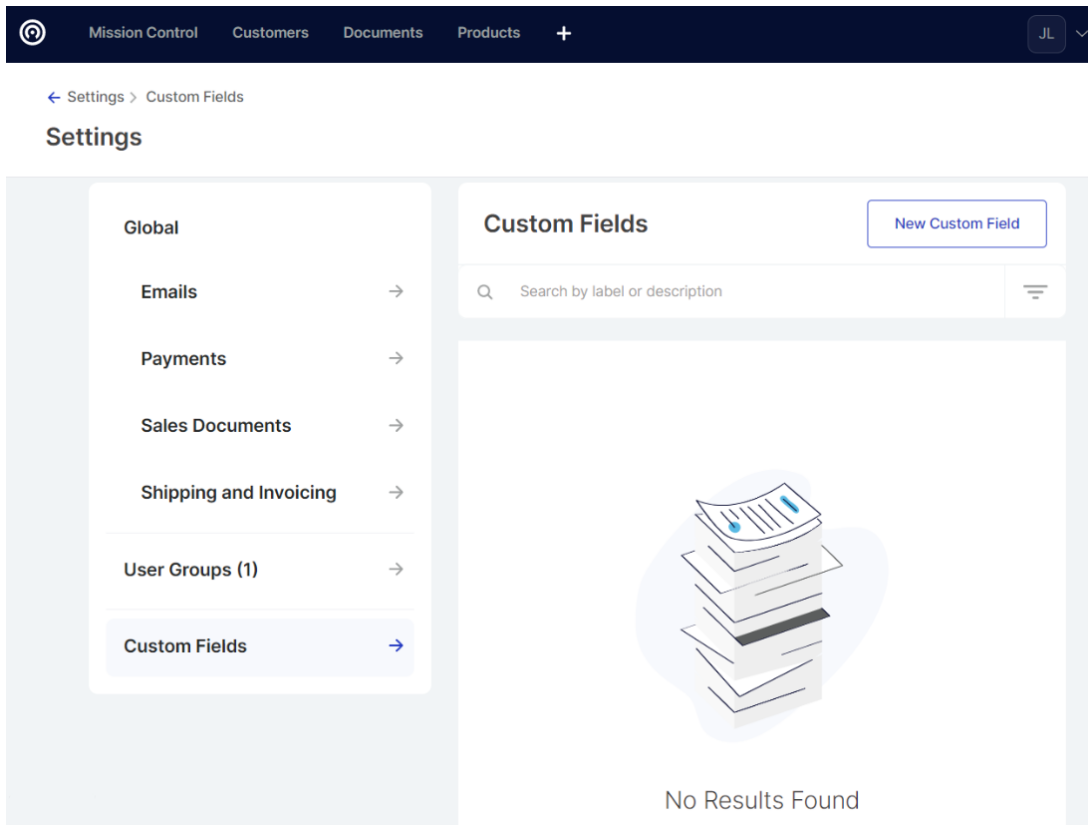
Global

- Emails
- Payments
- Sales Documents
- Shipping and Invoicing
- User Groups (1)
- Custom Fields

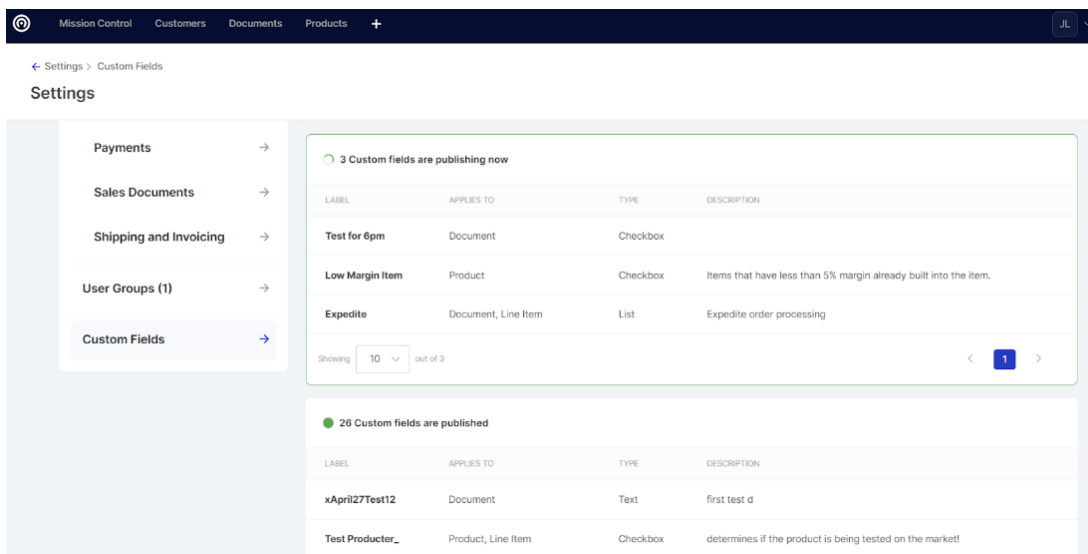
Emails

Upload Logo Choose Color

The first time logging in the experience will appear as below. To create a new Custom Field click the button "New Custom Field".

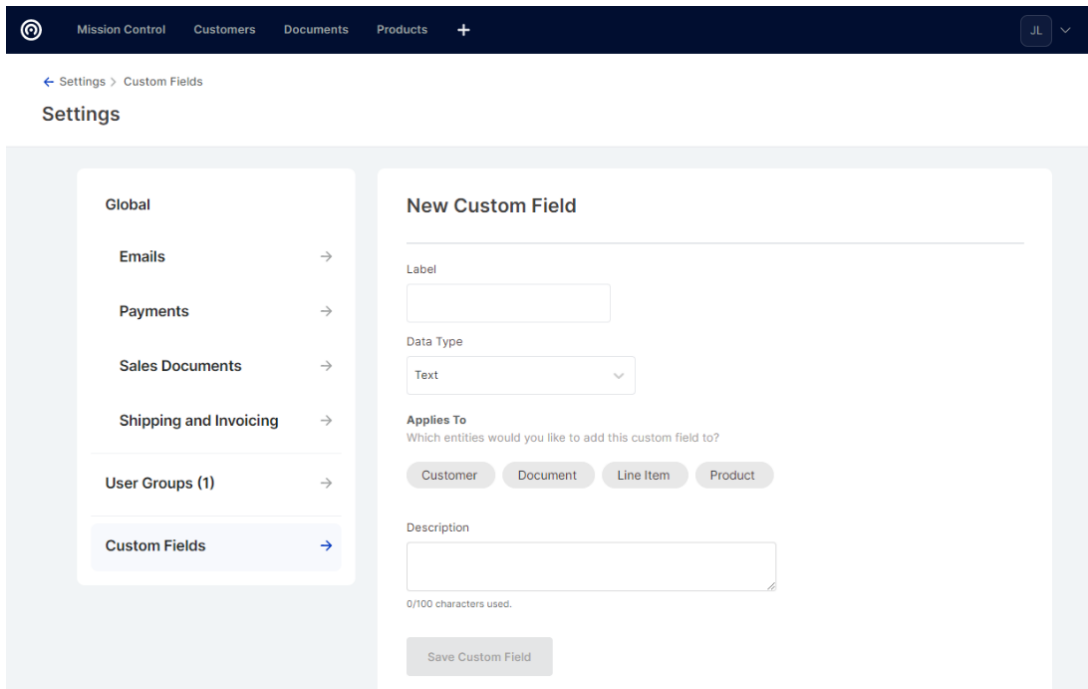


If this is not the first time logging in, a list of existing Custom Fields as well as any new fields that are scheduled to be published should appear on the screen.



How to enter a new Custom Field

After clicking the "New Custom Field" button the following screen will appear, fill out each section with the appropriate information for the new Custom Field.



Note: The Label field can hold a maximum of 18 characters.

Example of a filled out form:

New Custom Field

Label

High Value Cust

Data Type

Checkbox

Applies To

Which entities would you like to add this custom field to?

Customer ✓

Document ✓

Line Item

Product

Description

Customers that have ARR over \$50k

33/100 characters used.

Save Custom Field

Applies To

Custom fields can be associated with Customers, Documents, Line Items, and Products. The custom field will be available to view and edit for any objects of the types selected in this

section.

If multiple types are selected, values may be copied as documents are created.

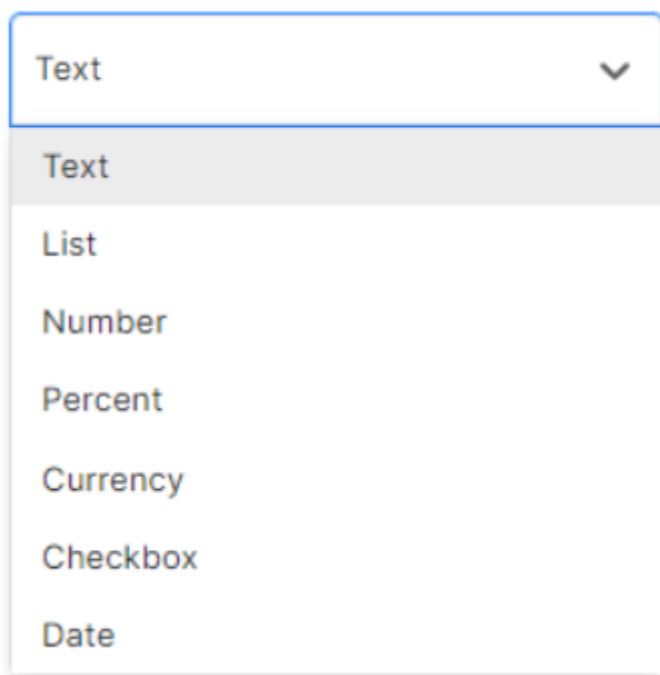
- If a field applies to both Customers and Documents, new documents will copy their value from their Customer.
- If a field applies to both Documents and Line Items, new lines will copy their value from their document.
- If a field applies to both Products and Line Items, new lines will copy their value from their product. This will overwrite any value copied from the document.

Changes made on the "Child" will not be reflected on the "Parent", and vice versa. This is to say, if a "Color" field applies to both Product and Line Item, and is set to "Red" on the product, new lines for that product will copy the value "Red". If on one line, the value is then changed to "Blue", this change will not propagate to other lines or to the product.

Data types

The following data types are available for use: Text, List, Number, Percent, Currency, Checkbox, Date

Data Type



A screenshot of a dropdown menu for selecting a data type. The menu is open, showing a list of options. The top option is "Text", which is currently selected and highlighted in a light blue box. Below it are "List", "Number", "Percent", "Currency", "Checkbox", and "Date". Each option is displayed in a simple, sans-serif font. A small downward-pointing arrow is visible on the right side of the "Text" option, indicating that the menu is open.

List Options Input

If you select List as the data type, the list items will be populated as they are typed into the new value box. Once all list items have been entered, the order can be rearranged by dragging and dropping each field to order how the list should be displayed. If an item needs to be removed, simply by clicking on the X to the right of the item.

Label

Expedite

Data Type

List

List Values

- None Default
- Same Day Processing
- Next Day Processing
- 2 Day Processing X
- Add a new value

Default to first list value

Additionally, when the "Default to first list value" is selected, the first item of the list will always be selected whenever the field is incorporated.

Integrating existing Custom Fields from Business Central

Cavallo has the ability to import other existing fields from Business Central through our Custom Fields screen.

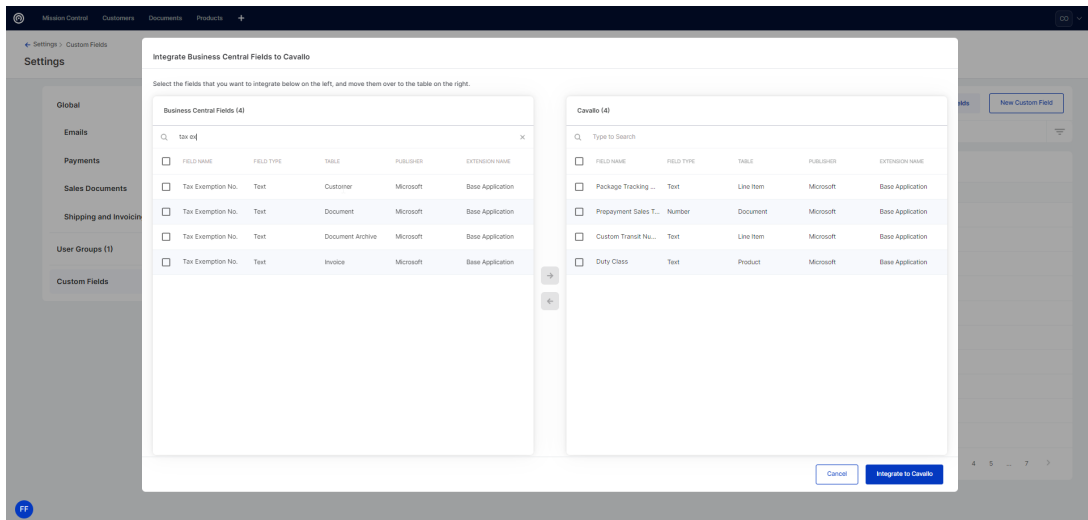


After clicking the "Integrate Existing Fields" button, the field picker will be displayed.

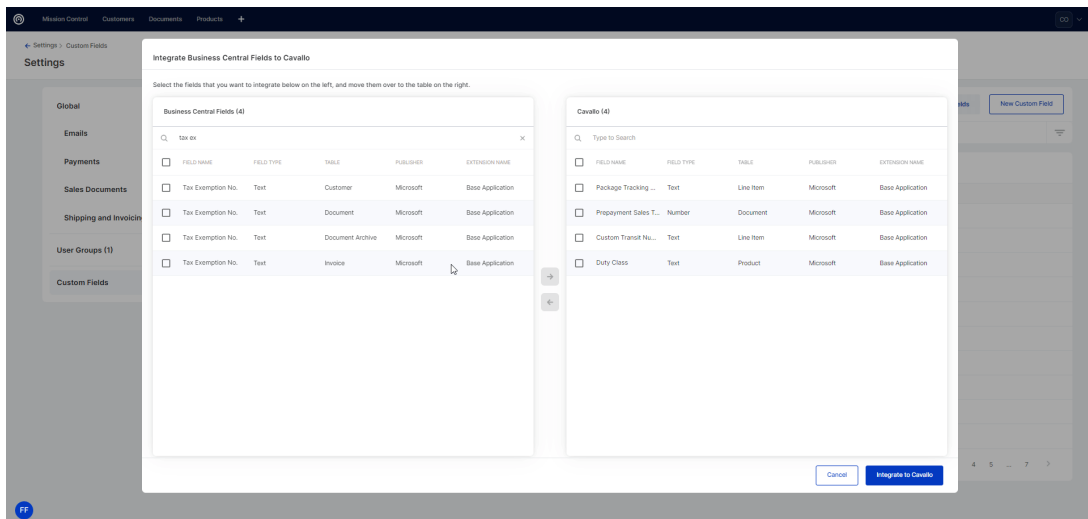
The screenshot shows the 'Custom Fields' configuration screen in Cavallo. On the left is a navigation menu with 'Custom Fields' selected. The main area displays a table of 62 existing fields from Business Central. The table has columns for LABEL, APPLIES TO, TYPE, and DESCRIPTION. The fields listed include LPS Zone, Transit from Date/Time, Stocked Warning, Ship to LPS Zone, Search Description, Sales Tax Amount Rounding, Retention Unit %, Retention Attached to Line No., Outstanding Amount, and notWalled. At the top right of the table area are buttons for 'Integrate Existing Fields' and 'New Custom Field'. A search bar is located above the table. At the bottom, it shows 'Showing 10 out of 62' and a pagination control.

LABEL	APPLIES TO	TYPE	DESCRIPTION
LPS Zone (BC Field)	Customer	Text	
Transit from Date/Time (BC Field)	Document	Date	
Stocked Warning (BC Field)	Product	List	
Ship to LPS Zone (BC Field)	Document	Text	
Search Description (Used only)	Line Item	Text	
Sales Tax Amount Rounding (BC Field)	Document	Number	
Retention Unit % (BC Field)	Line Item	Number	
Retention Attached to Line No. (BC Field)	Line Item	Number	
Outstanding Amount (BC Field) (Used only)	Document	Number	
notWalled (BC Field)	Document	Text	

On this screen, any fields that should be brought into Cavallo can be searched for.



After selecting the fields that should be integrated, click the right arrow to add them to the list of items to be brought into Cavallo. If there is a mistake, simply select the item(s) from the list on the right and click the left arrow to remove them from the import list.



When ready, either run a publish now or schedule one to be run in the future and the selected fields will be integrated into the Cavallo app. For reference, "(BC Field)" will be appended to the end of the Label for future reference.



Publishing new Custom Fields

Once all of the new Custom Fields have been entered, they will appear in a list at the top of the screen. If the list appears complete, the Custom Fields can be scheduled for publishing.

Custom Fields New Custom Field

Search by label or description

● 3 Custom fields are ready to publish Publish

LABEL	APPLIES TO	TYPE	DESCRIPTION
High Value Cust	Customer, Document	Checkbox	Customers that have ARR over \$50k
Expedite	Document, Line Item	List	Expedite order processing
Cust Anniversary	Customer	Date	Day we first started doing business with a Customer.

Showing 10 out of 3 1

Custom Fields can either be published now, or at a later time within the next 24 hours.

Publish (3) Custom Fields ×

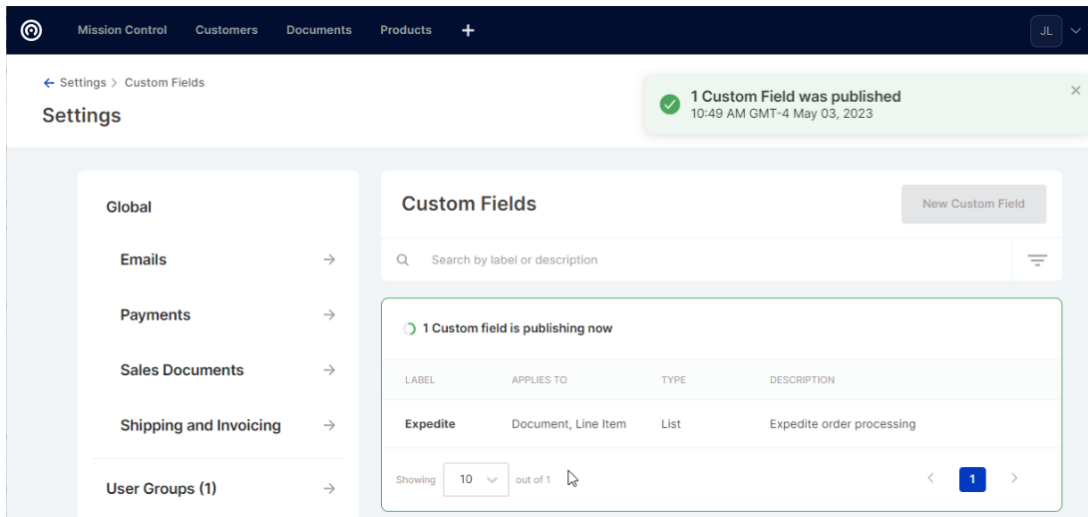
When should the 3 Custom Fields be published?

Publishing the Custom Fields Extension in your Microsoft Business Central company will temporarily log you out of the system.

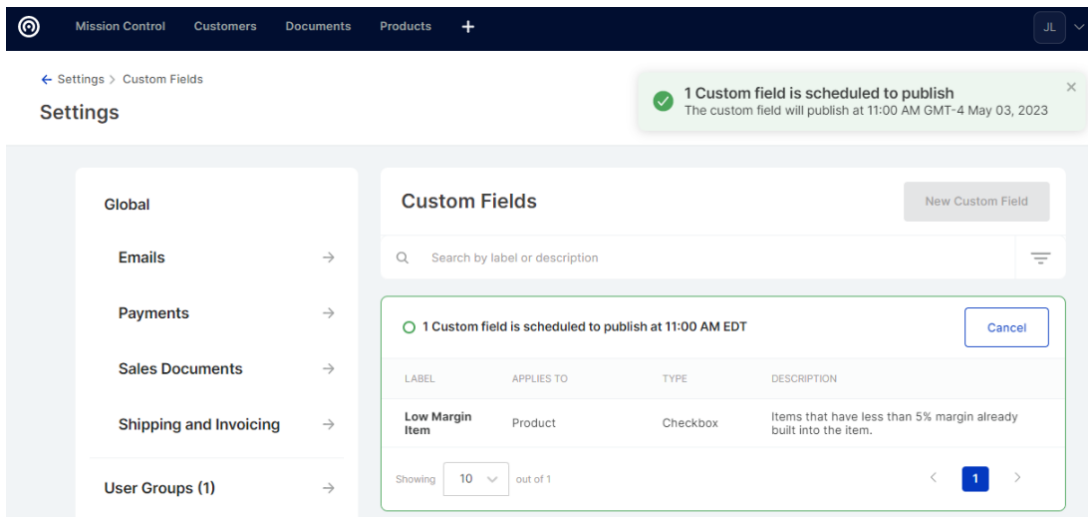
Now ▼

- Now
- 11:00 AM EDT
- 12:00 PM EDT
- 1:00 PM EDT
- 2:00 PM EDT
- 3:00 PM EDT
- 4:00 PM EDT

If publish now is selected, the following view will appear:



If publish at a later time is selected, the following view will appear:



NOTE: When a later time has been selected, users will not be able to add any new Custom Fields to the batch unless the scheduled publish has been canceled.

FAQs

What object types are Custom Fields supported on?

- Documents, including:
 - Quotes,
 - Orders,
 - Invoices, and
 - Returns
- Customers
- Line Item
- Item Masters/Products

At this moment in time, there is no support from Cavallo to have Custom Fields on Purchase

Orders.

How can I bulk update the new Custom Fields?

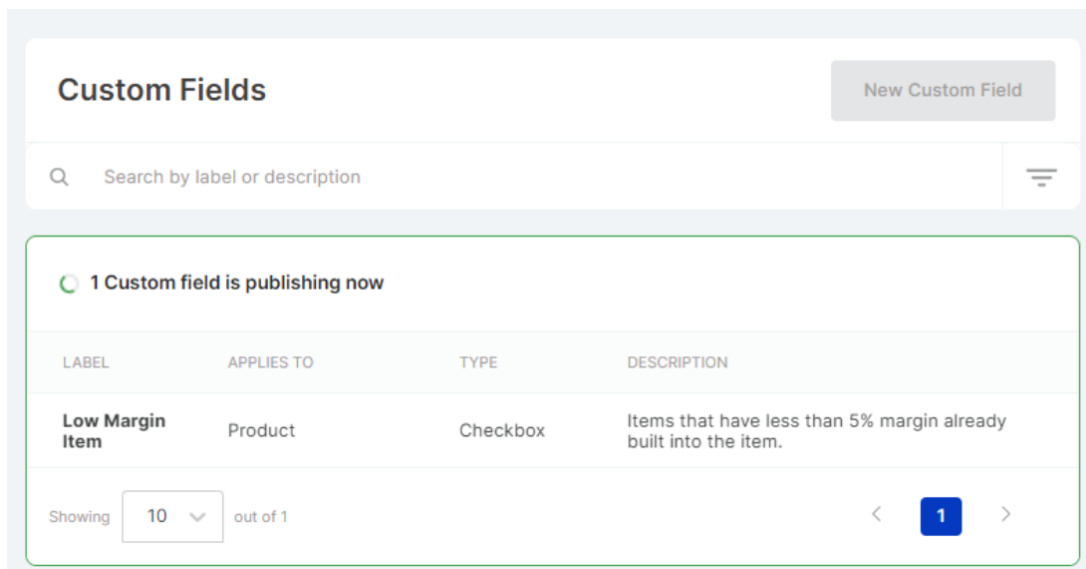
While there are no tools currently in Cavallo that will easily allow you to bulk update any of your new Custom Fields, you can use the existing functionality in BC to process a bulk update.

The following articles can help explain how to use the existing BC functionality:

- [Microsoft - Import Business Data from Other Finance Systems](#)
- [Encore Blog - How to Easily Import Data into Dynamics 365 Business Central](#)

I can't input any new Custom Fields

If you are unable to click the "New Custom Field" button because it is grayed out, there is probably either a publishing event currently running:



The screenshot shows the 'Custom Fields' interface. At the top right, there is a 'New Custom Field' button that is grayed out. Below the header is a search bar with the text 'Search by label or description'. A notification banner at the top of the table area states '1 Custom field is publishing now'. The table below has the following data:

LABEL	APPLIES TO	TYPE	DESCRIPTION
Low Margin Item	Product	Checkbox	Items that have less than 5% margin already built into the item.

At the bottom of the table area, it says 'Showing 10 out of 1' with a dropdown menu and a pagination control showing '1'.

Or there is a scheduled publishing job that has not run yet:

Custom Fields New Custom Field

Search by label or description

2 Custom fields are scheduled to publish at 2:00 PM EDT Cancel

LABEL	APPLIES TO	TYPE	DESCRIPTION
Low Margin Item	Product	Checkbox	Items that have less than 5% margin already built into the item.
Expedite	Document, Line Item	List	Expedite order processing

Showing 10 out of 2 1

In the first case you will need to wait until the process completes. In the second case, you can click the cancel button, add any new custom fields you would like, then reschedule the publishing job.

My scheduled publish didn't run, what happened?

If you see that a scheduled Custom Field publishing event has not occurred, please refresh your screen before contacting support.

Screenshot of process after 11:00am, before refreshing:

Settings Custom Fields

Settings

Global

- Emails →
- Payments →
- Sales Documents →
- Shipping and Invoicing →
- User Groups (1) →
- Custom Fields →

Custom Fields New Custom Field

Search by label or description

1 Custom field is scheduled to publish at 11:00 AM EDT Cancel

LABEL	APPLIES TO	TYPE	DESCRIPTION
Low Margin Item	Product	Checkbox	Items that have less than 5% margin already built into the item.

Showing 10 out of 1 1

27 Custom fields are published

11:01 AM 5/3/2023

Screenshot of process after 11:00am, after refreshing:

Settings | Document Edit | salespad-front-stage.herokuapp.com/settings/custom-fields?companyId=345

Mission Control | Customers | Documents | Products | + | JL

Settings > Custom Fields

Settings

Global

- Emails →
- Payments →
- Sales Documents →
- Shipping and Invoicing →
- User Groups (1) →
- Custom Fields** →

Custom Fields

New Custom Field

Search by label or description

1 Custom field is publishing now

LABEL	APPLIES TO	TYPE	DESCRIPTION
Low Margin Item	Product	Checkbox	Items that have less than 5% margin already built into the item.

Showing 10 out of 1

27 Custom fields are published

LABEL	APPLIES TO	TYPE	DESCRIPTION
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44°F Cloudy | Search | 11:03 AM 5/3/2023