# SalesPad for BC - Custom Fields

Cavallo Support - 2026-10-26 - Custom Fields

Custom Fields enable businesses to create unlimited extra fields for customers, documents, line items, and products in Business Central.  Track all of your business's required fields, and combine this with Mission Control to automate workflow processing based on these data points.


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## Setup

### With Mission Control

If you also buy Mission Control, then that setup process includes steps that establish communication between Mission Control and Business Central.  Complete those setup steps before continuing with Custom Fields setup.

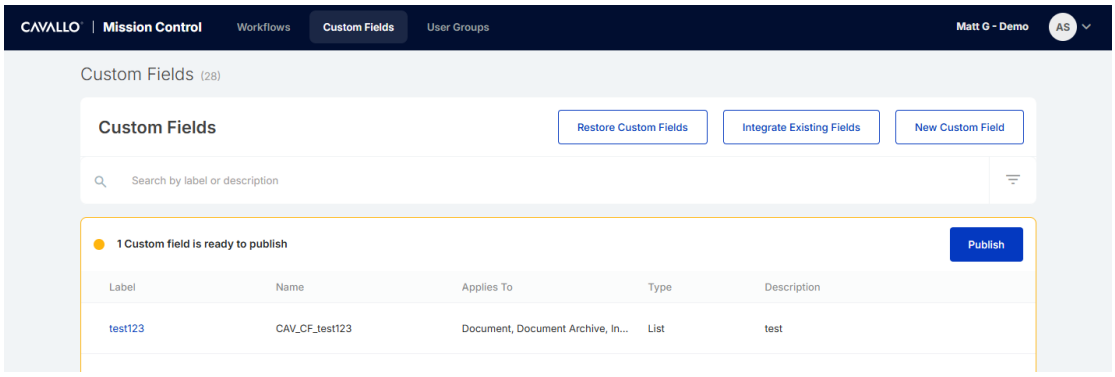
### Without Mission Control

If you buy Custom Fields without Mission Control, then you must provide your Business Central Tenant / Entra ID to Cavallo.  This allows Custom Fields to connect to your specific BC environment.

Your BC Tenant / Entra ID can be found by clicking the ? at the top right of Business Central, selecting "Help & Support", and copying the full text of the "Azure AD Tenant/Entra ID:" section at the bottom.  This must be completed before Custom Fields can be used.

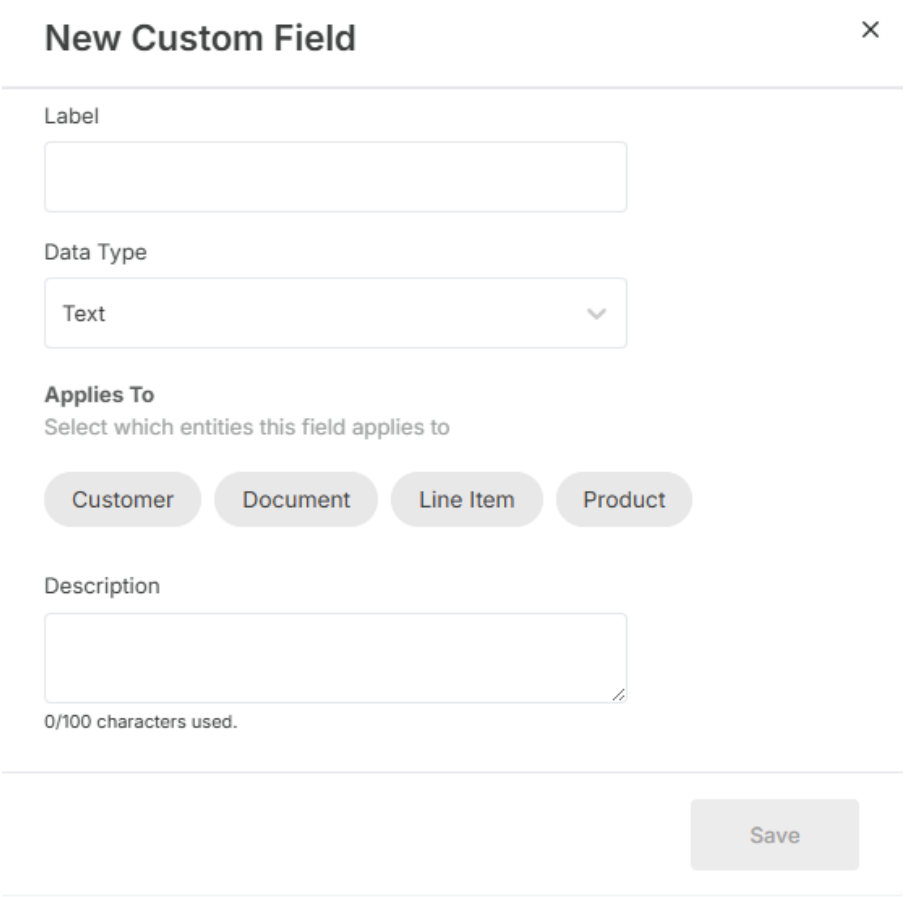
## Configure Custom Fields

In Mission Control, select Custom Fields from the top navigation.

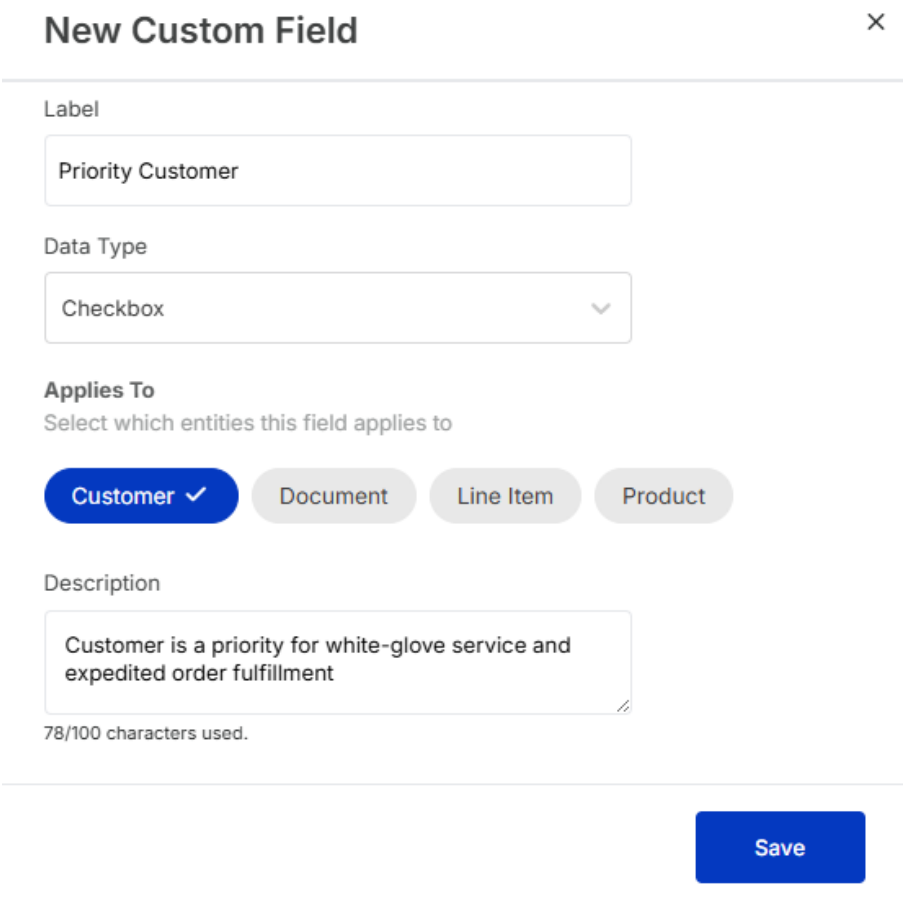



To create a new Custom Field, click the “New Custom Field” button at the top right.  Fill out the popup with the required information:

- **Label:** the display name that will be used for the custom field, max 18 characters
- **Data Type:** the type of data this field will hold, such as text, list, number, percent, currency, checkbox, or date
- **Applies To:** select the entities that should have this custom field, such as customers, documents, line items, and products
- **Description:** a helpful description for this custom field




The following screenshot shows a Priority Customer flag example:



### Supported Object Types

The following objects currently support custom fields:

- Sales documents, including:
    - Quotes
    - Orders
    - Invoices
    - Returns
    - Line Items
- Service documents, including:
    - Quotes
    - Orders
    - Invoices
    - Line Items
- Customers
- Item Masters / Products

### Custom Field Rolldowns

Custom fields can be assigned to customers, documents, line items, and products, which makes the field visible and editable for objects of that type in BC.

If multiple object types are selected, values will be automatically rolled down to related objects in certain situations:

- If a field applies to both customers and documents, new documents will copy the field value from their customer
- If a field applies to both documents and line items, new lines will copy the field value from their document
- If a field applies to both products and line items, new lines will copy the field value from their product (this overwrites any value copied from the document)

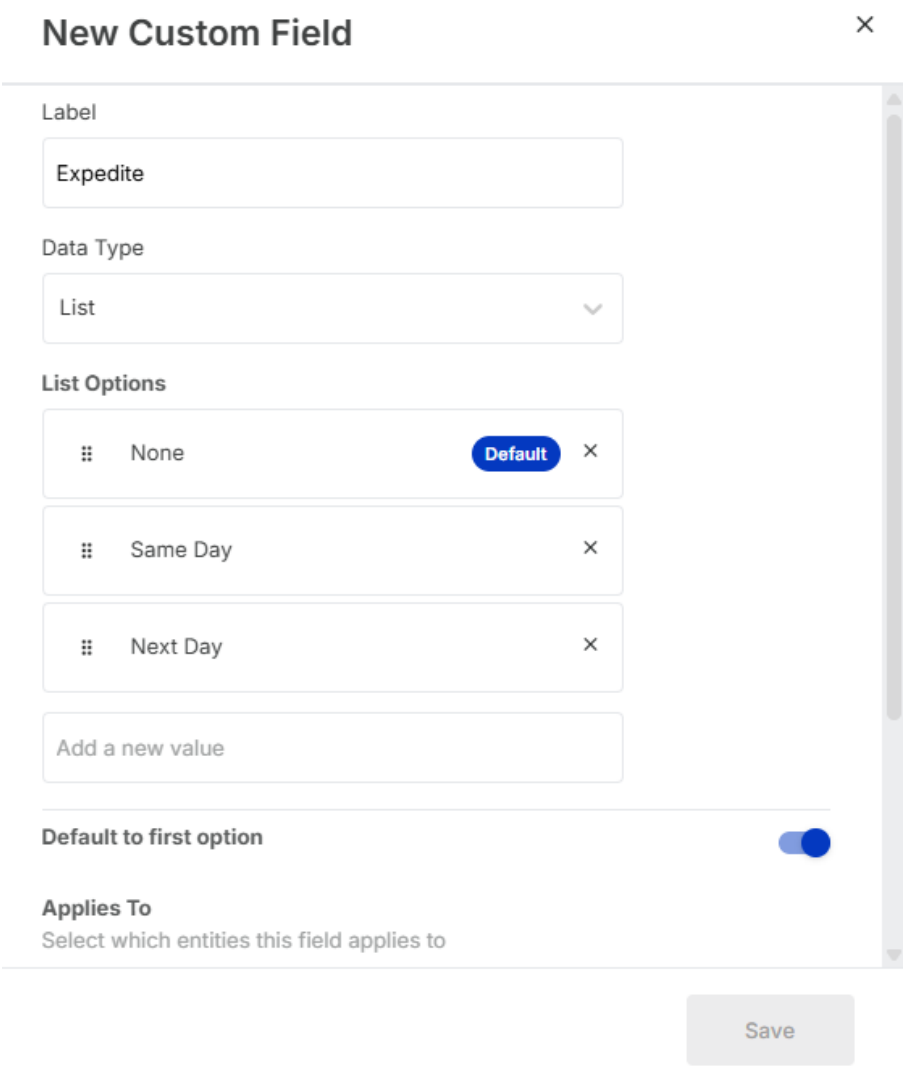
Changes made to the field on either object will not be reflected after the initial rolldown.  So if a Color custom field applies to both products and line items, and it is set to "Red" on the product, then new lines for that product will copy the value "Red" for their Color field.  If on one line, the value is then changed to "Blue", this change will not propagate to other lines or to the product.  And if the Color is changed to "Green" on the product, that will not affect any existing line items - it will only affect new line items that are created after that change.

### List Options

When "List" is selected as the data type, list options must be added.  Type each option into the "Add a new value" box, hitting Enter after to add the option to the list.

As list items are entered, their sequence can be rearranged by dragging and dropping each field, which affects how they are displayed to people who are selecting values for the custom field.  Click the X to the right of any items that should be removed.

Toggle on "Default to first option" to make the field automatically default to the first option in the list.  In this example, the Expedite field will default to "None", and then people can change that to "Same Day" or "Next Day".  Toggle this default option off if you want to know whether someone has made a selection, or make them review the field instead of accidentally letting it proceed with the default value.



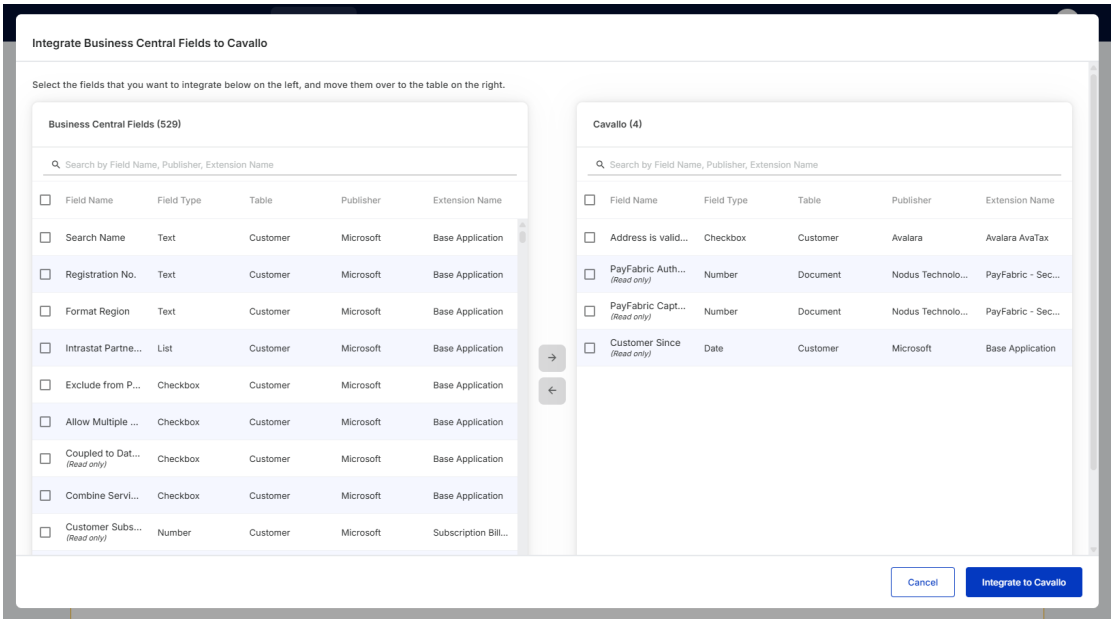

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## Integrate Existing BC Fields

Existing fields from Business Central can be imported via the Custom Fields screen so they can be used in Mission Control.  This makes it possible to structure workflows, business rules, and automations around other BC fields and 3rd party extensions.

Click the Integrate Existing Fields button to see the field integration popup.  You can search for fields to find them more easily.

Select any fields that should be integrated, then click the right arrow to add them to the list of items to be brought into Cavallo.




If any fields were selected by mistake, simply select them from the list on the right and click the left arrow to remove them from the import list.

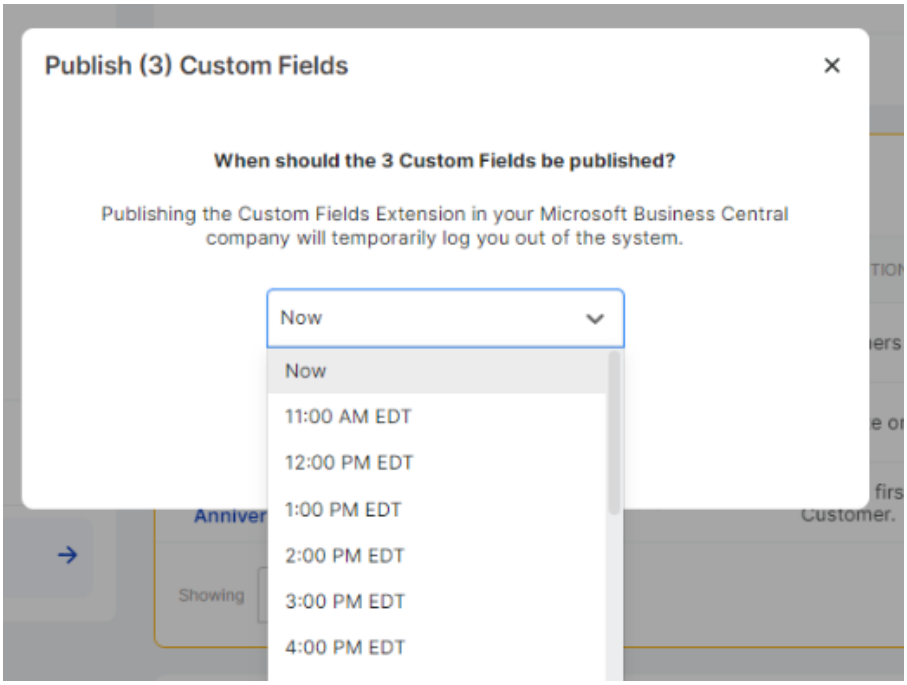
When ready, click the Integrate to Cavallo button at the bottom right.  Note that “(BC Field)” will be appended to the end of the field label for easy visibility of which fields were imported this way.

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## Publish Custom Fields

New custom fields appear at the top of the list in a "X Custom fields are ready to publish" group.  Custom fields must be published to be available in BC.

They can either be published now, or at a later time within the next 24 hours.  If a later time is selected, new custom fields cannot be added to the publish group unless the scheduled publish is cancelled first.




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# FAQs

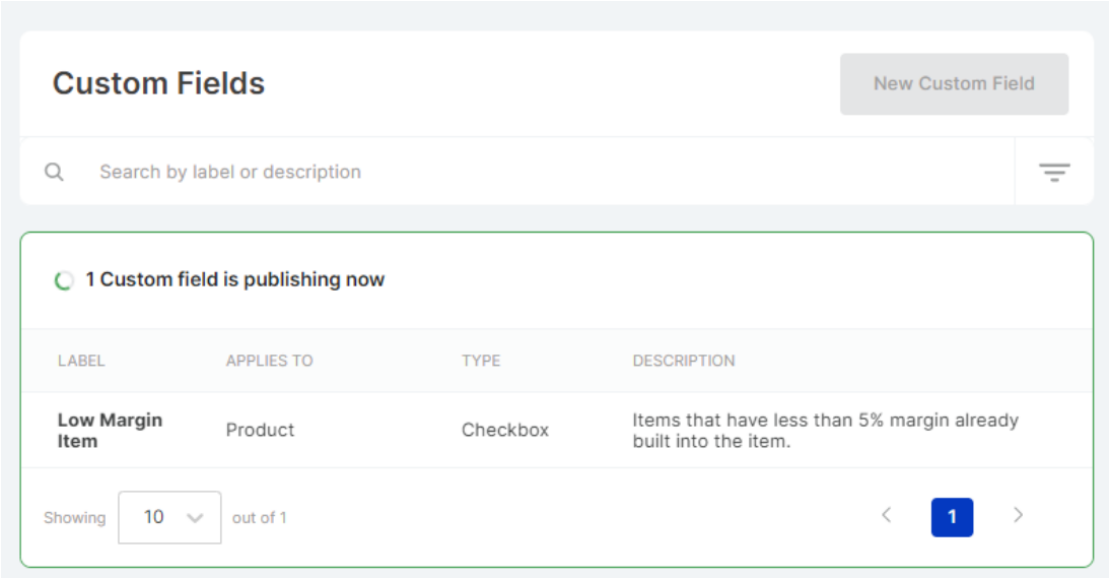
### How can I bulk update the new Custom Fields?

Existing functionality in BC can be used to process a bulk update:

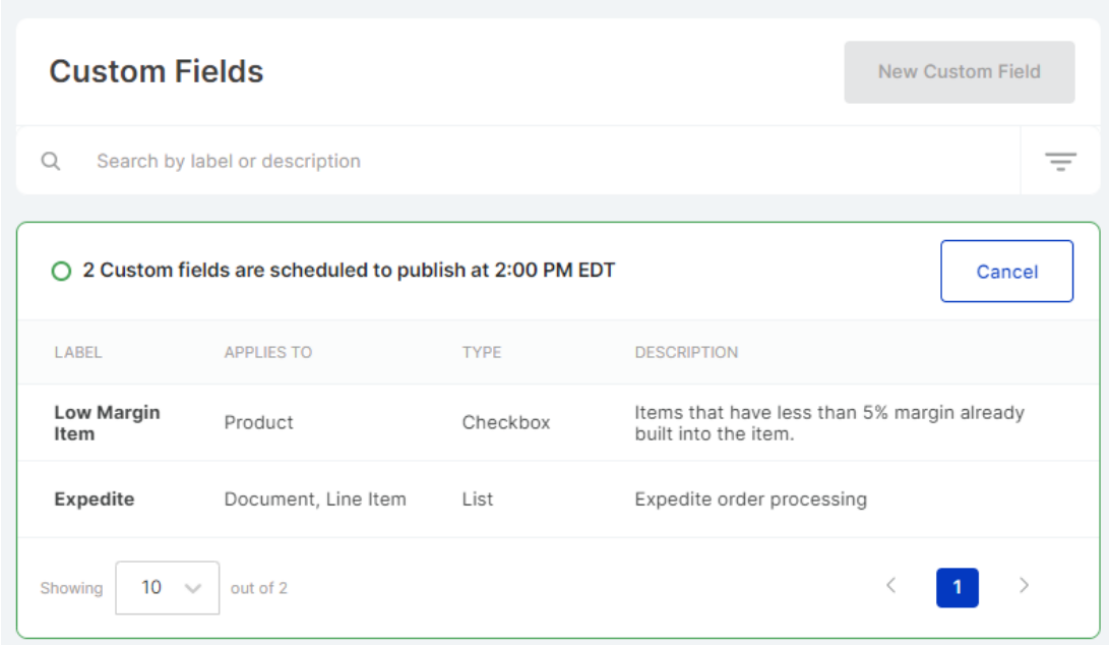
- Microsoft - Import Business Data from Other Finance Systems
- Encore Blog - How to Easily Import Data into Dynamics 365 Business Central

### I can't create any new Custom Fields

If the "New Custom Field" button is grayed out, there may be a publishing event currently running.  This process must complete before you can add new custom fields.




Or there may be a scheduled publishing job that has not run yet.  You can click the Cancel button, add your new field, then re-schedule publishing for the fields.



### My scheduled publish didn’t run, what happened?

If you see that a publishing event has not occurred at its scheduled time, the screen may not have automatically refreshed yet to show it is processing.  Please refresh your screen before contacting support.