

Knowledgebase > Mission Control > Mission Control Documentation > Mission Control: Custom Fields

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 in in place, please connect with the Cavallo Support team.

Where to find Custom Fields

Navigate to the top right of the Cavallo app

Mission Control Customers Docume	nts Products 🕂	JL V
■ All Workflows ∨ Last updated Less than	na min ago Refresh 👌 Total Documents 255	Cost \$917,377.20 Total \$1,250,307.85
Approvals (3)	Q Search by Your Reference ~ Type to Search	BC 🎒 HR 💭 +3 😇 🛄
Select All	Cocuments need approval DOC NUMBER CUST. PO NUMBER CUSTOMER	DOC DATE STATUS
Order Workflow	Margin Validation <10% (3)	
Workflows (14) Q. Search	DOC NUMBER V CUST. PO NUMBER CUSTOMER	DOC DATE STATUS
Select All	 Create Order (0) 	
Quote Workflow	 New Order (18) Order Details (3) 	
	$^{\vee}$ Waiting for Payment (1)	

Select Settings from the menu

All Workflows 🗸 🗉	ast updated Less th	an a min ago Refresh 💍		Total Documents 255	Cost \$917,377.20	Switch company Jeff Lambert - Cror
Approvals (3)		Q Search by Your Reference	•∽ Type to Se	earch	BC 🎯 HR 🏹 +	Settings
Q Search						Log Out
Select All		^ ▲ Documents	need approval			209 001
Order Workflow	~	DOC NUMBER 🔸	CUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS
		✓ Margin Validati	on <10% (3)			
Workflows (14)		DOC NUMBER 🔸	CUST. PO NUMBER	CUSTOMER	DOC DATE	STATUS
Select All		✓ New Quote (5)				
Select All		✓ Create Order (0)))			
Quote Workflow	\sim	V New Order (18)				

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

0	Mission Control Customers De	ocuments	Products 🕂		JL ~
	Settings > Emails				
	Global		Emails		
	Emails	→	Upload Logo	Choose Color	
	Payments	\rightarrow			
	Sales Documents	\rightarrow			
	Shipping and Invoicing	\rightarrow			
	User Groups (1)	\rightarrow			
	Custom Fields	\rightarrow			

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

Mission Control Customers Do	ocuments	Products +	JL ~
← Settings > Custom Fields Settings			
Global		Custom Fields	v Custom Field
Emails	\rightarrow	Q Search by label or description	-
Payments	\rightarrow		
Sales Documents	\rightarrow		
Shipping and Invoicing	\rightarrow	(IIIIII)	
User Groups (1)	\rightarrow		
Custom Fields	÷		
		No Results Found	

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.

0	Mission Control Customers Do	ocuments	Products +			X
	tings > Custom Fields					
	Payments	÷	 3 Custom fields are 	a publishing now		
	Sales Documents	\rightarrow	LABEL	APPLIES TO	TYPE	DESCRIPTION
	Shipping and Invoicing	\rightarrow	Test for 6pm	Document	Checkbox	
	User Groups (1)	\rightarrow	Low Margin Item	Product	Checkbox	Items that have less than 5% margin already built into the item.
	Custom Fields	<i>→</i>	Expedite	Document, Line Item	List	Expedite order processing
	Custom Fields	~	Showing 10 v out	of 3		< 1 >
			26 Custom fields a	re published		
			LABEL	APPLIES TO	TYPE	DESCRIPTION
			xApril27Test12	Document	Text	first test d
			Test Producter_	Product, Line Item	Checkbox	determines if the product is being tested on the market!

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.

© •	Aission Control Customers Do	ocuments	Products 🕂	JL ~
← Sett	ings > Custom Fields			
	Global		New Custom Field	
	Emails	\rightarrow	Label	
	Payments	\rightarrow		
	Sales Documents	\rightarrow	Data Type Text	
	Shipping and Invoicing	\rightarrow	Applies To Which entities would you like to add this custom field to?	
	User Groups (1)	\rightarrow	Customer Document Line Item Product	
	Custom Fields	÷	Description	
			0/100 characters used.	

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 to Customer ✓ Document ✓	
Description	
Customers that have ARR over \$50	lk
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 vise 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	
Text	~
Text	
List	1
Number	
Percent	
Currency	
Checkbox	
Date	

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	
# 2 Day Processing	⊳ ×
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.

×

gii > Custom Fields 1995					
Global		Custom Fields			Integrate Existing Fields New Custom Field
Emails	÷	Q. Search by label or description			
Payments	->	62 Custom fields are published			
Sales Documents	~	LABL.	APPLIES TO	TYPE DESCRIPTION	
Shipping and Invoicing	÷	UPS Zone (BC Field)	Customer	Text	
User Groups (1)	<i>→</i>	Transit-from Date/Time (80 Field)	Document	Date	
August False	+	Stockout Warning (BC Field)	Product	Ust	
Custom Fields	-	Ship-to UPS Zone (8C Field)	Document	Text	
		Search Description (New only)	Line Item	Text	
		Sales Tax Amount Rounding (Sc Field)	Document	Number	
		Retention VAT % (BC Field)	Line Item	Number	
		Retention Attached to Line No. (BC Reta)	Line Item	Number	
		Outstanding Amount (\$) (IIC Field) (Read only)	Document	Number	
		nodWalletID (#C field)	Document	Text	
		Showing 10 v out of 62			< 1 2 3 4 5 7 >

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

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

ngs	Integrate Business Cent	ral Fields to Caval	10										-	
	Select the fields that you wan	at to integrate below	in the left, and move them	over to the table on	the right.									
Global	Business Central Fields (4	\$)					Cav	allo (4)					alds New Cus	tom I
Emails	O, tax ex				×		Q	Type to Search						
Payments	TIELD NAME	FIELD TYPE	TABLE	PUBLISHER	EXTENSION NAME			FIELD NAME	FIELD TYPE	TABLE	PUBLISHER	EXTENSION NAME		
Sales Documents	Tax Exemption No.	Text	Customer	Microsoft	Base Application			Package Tracking	Text	Line Item	Microsoft	Base Application		
Shipping and Invoicin-	Tax Exemption No.	Text	Document	Microsoft	Base Application			Prepayment Sales T	Number	Document	Microsoft	Base Application		
User Groups (1)	Tax Exemption No.	Text	Document Archive	Microsoft	Base Application			Custom Transit Nu	Text	Line Item	Microsoft	Base Application		
out oroups (i)	Tax Exemption No.	Text	Invoice	Microsoft	Base Application			Duty Class	Text	Product	Microsoft	Base Application		
Custom Fields						<i>></i>								
						4								
													4 5 3	,

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.

ings	Integrate Business Ce	mural Fields to Cav	78110										
	Select the fields that you	want to integrate belo	w on the left, and move them	over to the table o	in the right.								
Global	Business Central Field	s (4)					Caval	llo (4)					Hds New Custom Fi
Emails	O, tax ex				×		۹. ۲	Type to Search					
Payments	FIELD NAME	FIELD TYPE	TABLE	PUBLISHER	EXTENSION NAME			FIELD NAME	RELD TYPE	TABLE	PUBLISHER	EXTENSION NAME	
Sales Documents	Tax Exemption P	Io. Text	Customer	Microsoft	Base Application			Package Tracking	Text	Line Item	Microsoft	Base Application	
Shipping and Invoicin	Tax Exemption P	lo. Text	Document	Microsoft	Base Application			Prepayment Sales T	Number	Document	Microsoft	Base Application	
User Groups (1)	Tax Exemption P	Io. Text	Document Archive	Microsoft	Base Application			Custom Transit Nu	Text	Line Item	Microsoft	Base Application	
	Tax Exemption P	Io. Text	Invoice	Microsoft	Base Application	<i>→</i>		Duty Class	Text	Product	Microsoft	Base Application	
Custom Fields						*							
						<i>e</i> -							
													4 5 7

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 Fi	New Custom Field		
Q Search by la	abel or description		-
😑 3 Custom fie	elds 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 v	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?									
			-						
Publ		stom Fields Extension in ye any will temporarily log you							
	oomp	, , , , , , , , , , , , , , , , , , ,		,					
		Now	~						
						iers			
		Now							
		11:00 AM EDT				e or			
		12:00 PM EDT							
	Annive	1:00 PM EDT			Custor	firs ner.			
<i>→</i>		2:00 PM EDT		-					
	Showing	3:00 PM EDT							
		4:00 PM EDT							

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

0	Mission Control Customers I	Documents	Products -	+				JL ~
	tings > Custom Fields				1 Custon 10:49 AM 0	Field was published GMT-4 May 03, 2023		×
	Global		Custor	n Fields			New Custom Field	
	Emails	\rightarrow	Q Searci	h by label or description				Ŧ
	Payments	÷) 1 Custo	om field is publishing now				
	Sales Documents	\rightarrow	LABEL	APPLIES TO	TYPE	DESCRIPTION		
	Shipping and Invoicing	\rightarrow	Expedite	Document, Line Item	List	Expedite order processir	ng	
	User Groups (1)	\rightarrow	Showing 1	0 🗸 out of 1 🎝			< 1 →	

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

0	Mission Control Customers Do	ocuments	Products 🕂					JL
	iettings > Custom Fields				I Custom	field is scheduled to field will publish at 11:00	publish AM GMT-4 May 03, 2023	× 3
	Global		Custom F	ields			New Custom Field	
	Emails	\rightarrow	Q Search by	label or description			-	-
	Payments	\rightarrow	O 1 Custom fi	eld is scheduled to publi	sh at 11:00 AM EDT		Cancel	
	Sales Documents	\rightarrow	LABEL	APPLIES TO	ТҮРЕ	DESCRIPTION		
	Shipping and Invoicing	\rightarrow	Low Margin Item	Product	Checkbox	Items that have less the built into the item.	an 5% margin already	
	User Groups (1)	\rightarrow	Showing 10	∽ out of 1			< 1 >	

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,
 - $\circ~$ Orders,
 - $\circ~$ Invoices, and
 - Returns
- CustomersLine 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:

- <u>Microsoft Import Business Data from Other Finance Systems</u>
- 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:

Custom Fi	New Custom Field				
Q Search by la	abel or description				Ŧ
O 1 Custom fie	ld is publishing now				
LABEL	APPLIES TO	TYPE	DESCRIPTION		
Low Margin Item	Product	Checkbox	Items that have less that built into the item.	an 5% margin alread	у
Showing 10 V	out of 1			< 1	>

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

Custom Fi	New Custom Field			
Q Search by la	abel or description			
O 2 Custom fie	lds are scheduled to pub	lish at 2:00 PM ED	T	Cancel
LABEL	APPLIES TO	TYPE	DESCRIPTION	
Low Margin Item	Product	Checkbox	Items that have less than 5 built into the item.	5% margin already
Expedite	Document, Line Item	List	Expedite order processing	
Showing 10 v	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.

Settings × D	ocument Edit	× +	~ - ō ×
igstarrow igstarro	rokuapp.com/settin		🕒 년 🛧 🛊 🎫 🗖 餐 :
Mission Control Customers	Documents	Products +	JL ~
← Settings > Custom Fields Settings			
Global		Custom Fields	New Custom Field
Emails	\rightarrow	Q Search by label or description	-
Payments	\rightarrow	O 1 Custom field is scheduled to publish at 11:00 AM EDT	Cancel
Sales Documents	\rightarrow	LABEL APPLIES TO TYPE DESCRIPTION	
Shipping and Invoici	ng →	Low Margin Product Checkbox liters that h Item into the iten	ave less than 5% margin already built n.
User Groups (1)	\rightarrow	Showing 10 v out of 1	
Custom Fields	÷	27 Custom fields are published	
F		LABEL APPLIES TO TYPE DESCRIPTION	
44°F Cloudy		📕 🔍 Search 🛛 🖄 🖬 🧭	11:01 AM 5/3/2023

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

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

O Settin	gs	×	Document Edit	× +					\sim	_	0 ×
	C 🗎 salespad	-front-stage.h	erokuapp.com/settir					3 € \$	*	=J [1 🛞 E
0	Mission Control	Customers	Documents	Products +							JL ~
← Se	ttings > Custom Fi	elds									
Set	tings										
	Global			Custom I	Fields			New	Custon	Field	
	Emails		\rightarrow	Q Search by	/ label or description						Ŧ
	Payment	S	\rightarrow	O 1 Custom f	ield is publishing now	b					
	Sales Do	cuments	\rightarrow	LABEL	APPLIES TO	TYPE	DESCRIPTION				
	Shipping	and Invoic	ing \rightarrow	Low Margin Item	Product	Checkbox	Items that have less tha into the item.	an 5% margin a	lready	built	
	User Group	os (1)	\rightarrow	Showing 10	✓ out of 1			<	1	>	
A	Custom Fie	elds	÷	27 Custom	fields are published						
				LABEL	APPLIES TO	ТҮРЕ	DESCRIPTION				
44°F Clou				Q	Search	🐁 🖬 🗳 👘					11:03 AM 5/3/2023