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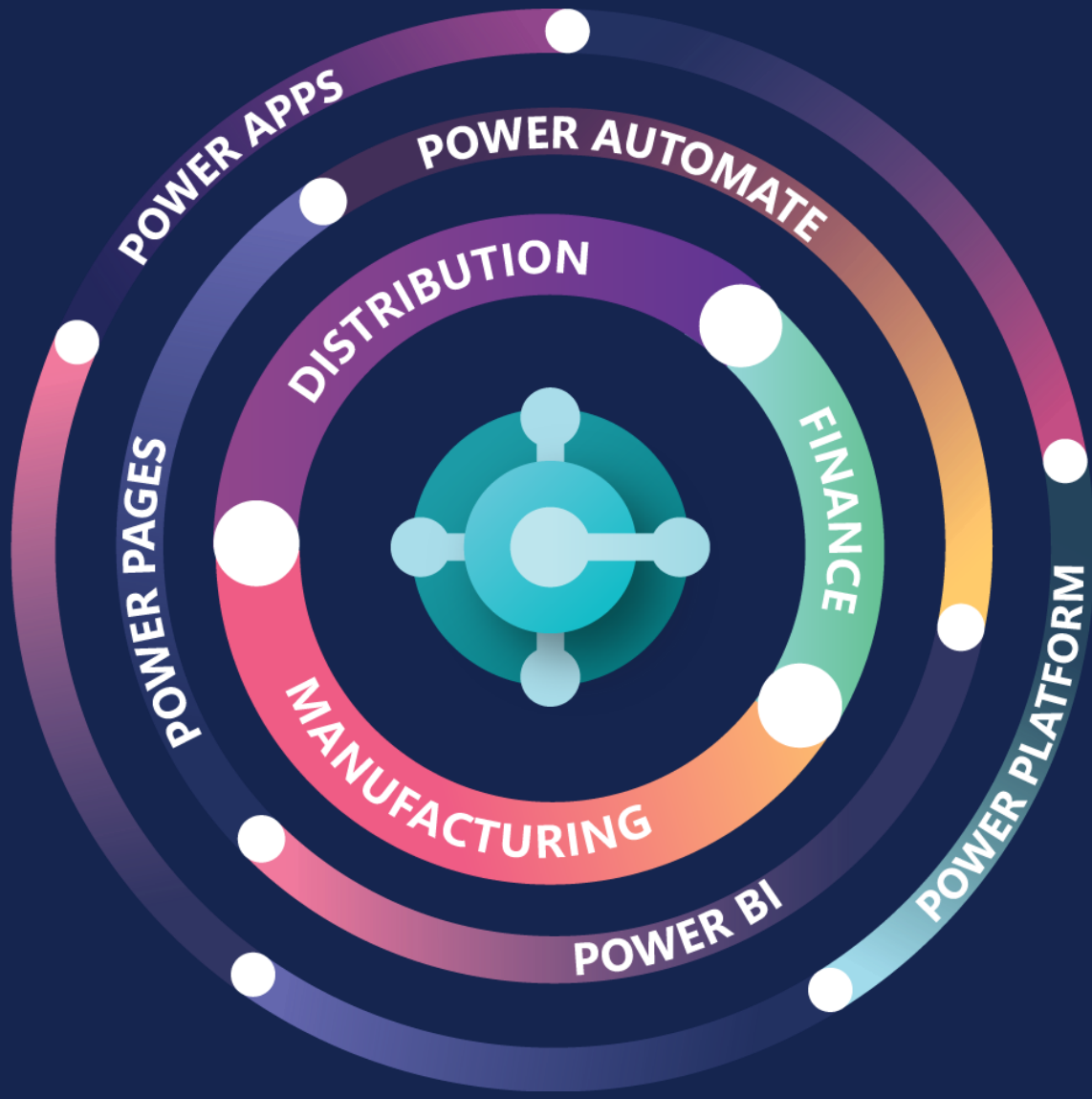
Is your data right and how can you guarantee it stays that way?



15th & 16th OCTOBER 2024

Can you hear me?

Is everything clear?

~ 45 mins

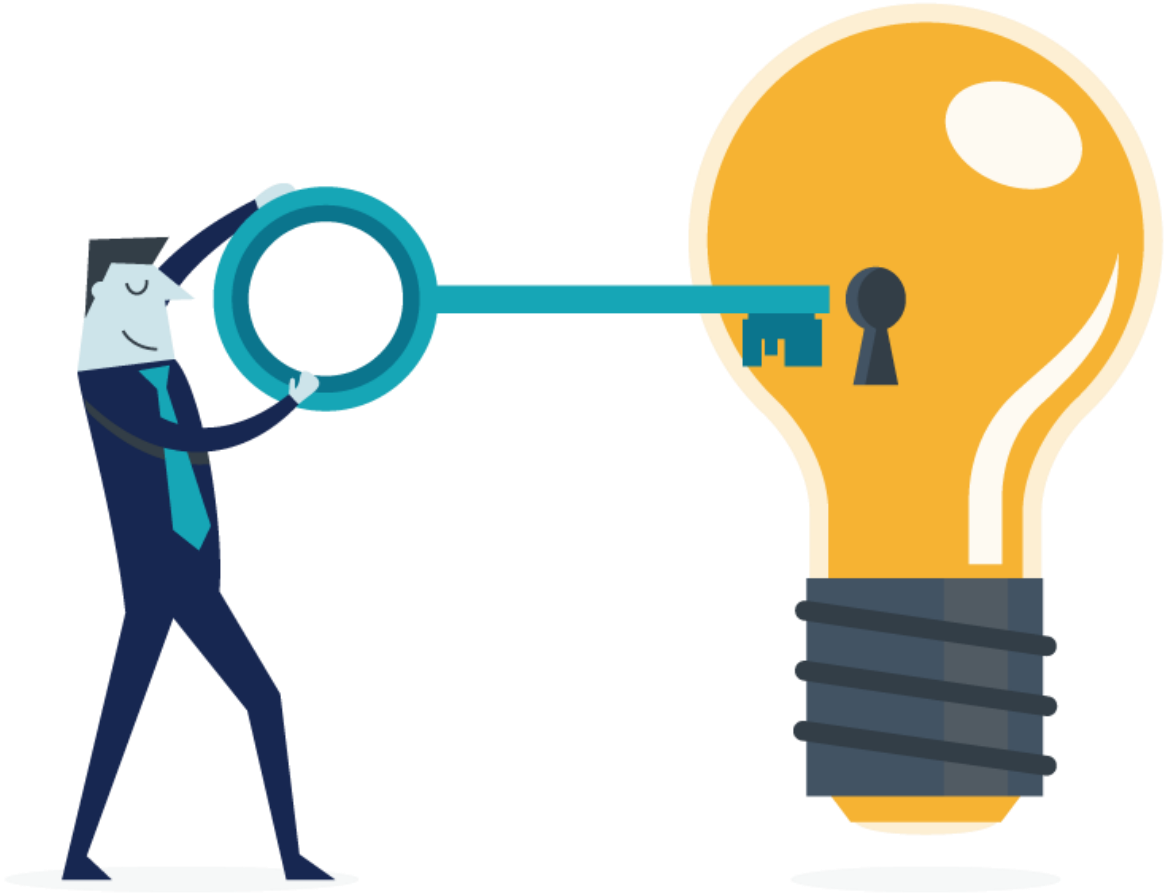
Q & A

Hi!

Gary Frostick
Clever Dynamics

What we'll cover

1. Why Data Quality is so important?
2. When should you check your data?
3. Data checking in Standard Business Central
4. Clever Data Validation



Why is Data Quality so Important?

Why is Data Quality so Important?

- Bad or missing data may stop you processing orders
- Bad or missing data slows you down
- Bad or missing data means you may have the wrong information internally
- Bad or missing data means you may give the wrong information to your customers
- Bad or missing data makes it harder to find the right information
- Bad or missing data means you may an incomplete view of historical data and trends
- Bad or missing data means you may not be able to produce the reports you or your co-workers require

When should you check your data?

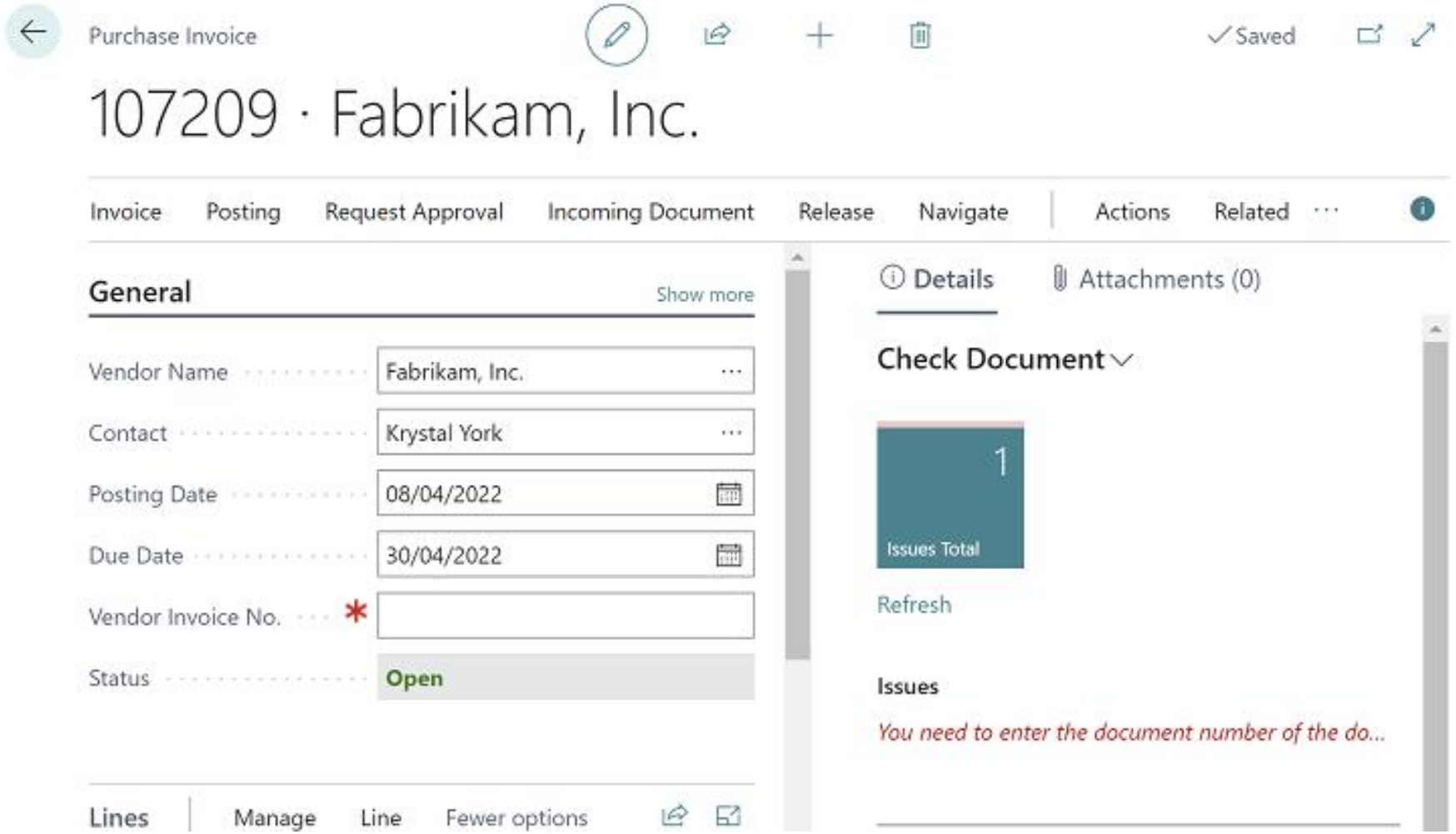
- Creating new master data records
- Entering documents
- Entering journals
- Batch loading data
- Migrating data from an existing system.

Data checking in Standard Business Central

- **Dimension Rules**
  - Dimension Values
  - Mandatory Dimensions
  - Dimension Combinations

- **Data Check on Documents and Journals**
  - Useful but only pre-warning of errors you will receive on posting

Data checking in Standard Business Central



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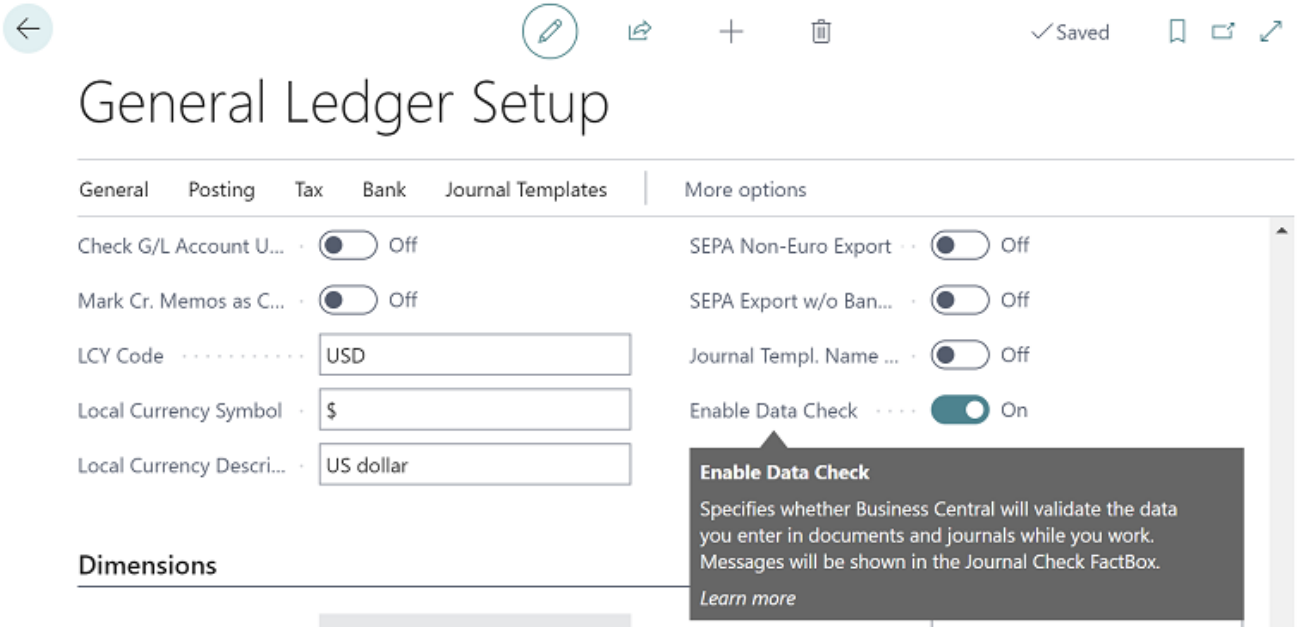
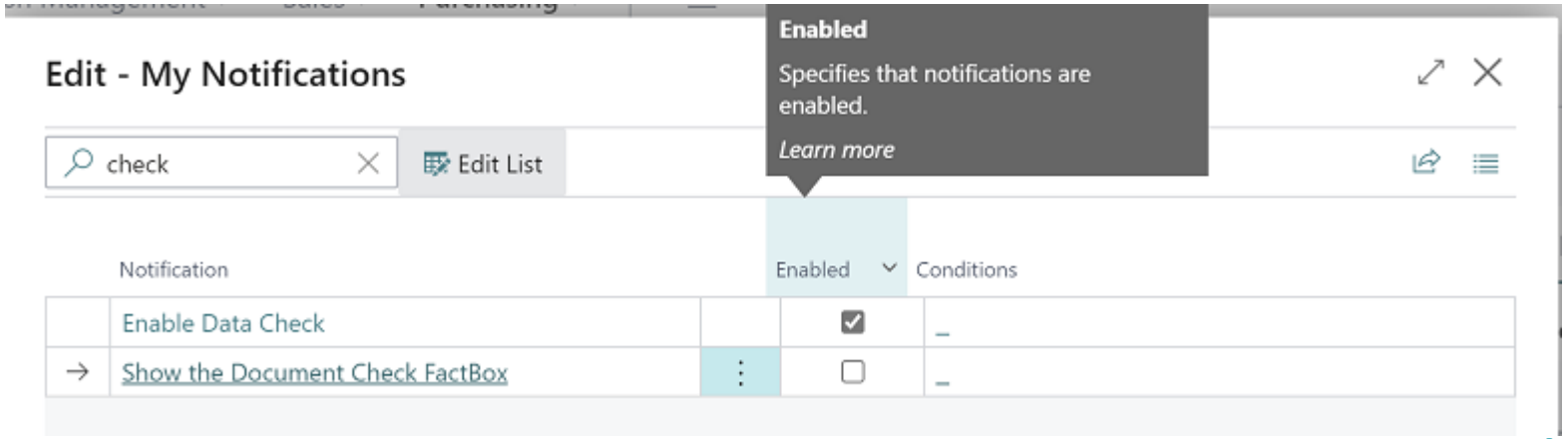
Data checking in Standard Business Central





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Clever Data Validation

- Template driven data check that can be set against **ANY** table in Business Central
- Data Checks:
  - Mandatory Fields
  - Field Lengths
  - Value Range
  - Allowed Values
  - Check Format of data (i.e. Bank account numbers, Post Codes etc.)
  - Can vary depending on other data on the record (i.e. different address formats for different countries)
- Can block failed master data records
- Can check documents on release
- Can batch check data of same records
- Can check data imported through configuration packages

Demo

Clever Data Validation Demo

1. Introduction to Clever Data Validation
2. Data Validation Templates
3. Conditional Data Validation Templates
4. Using Copilot with Clever Data Validation
5. Record Restrictions and Workflow
6. Checking Imported Data

If you currently have Clever Essentials…

- No additional cost for Clever Data Validation.

If you don’t currently have Clever Essentials…

- Clever Essentials £125 per month
- Individual App

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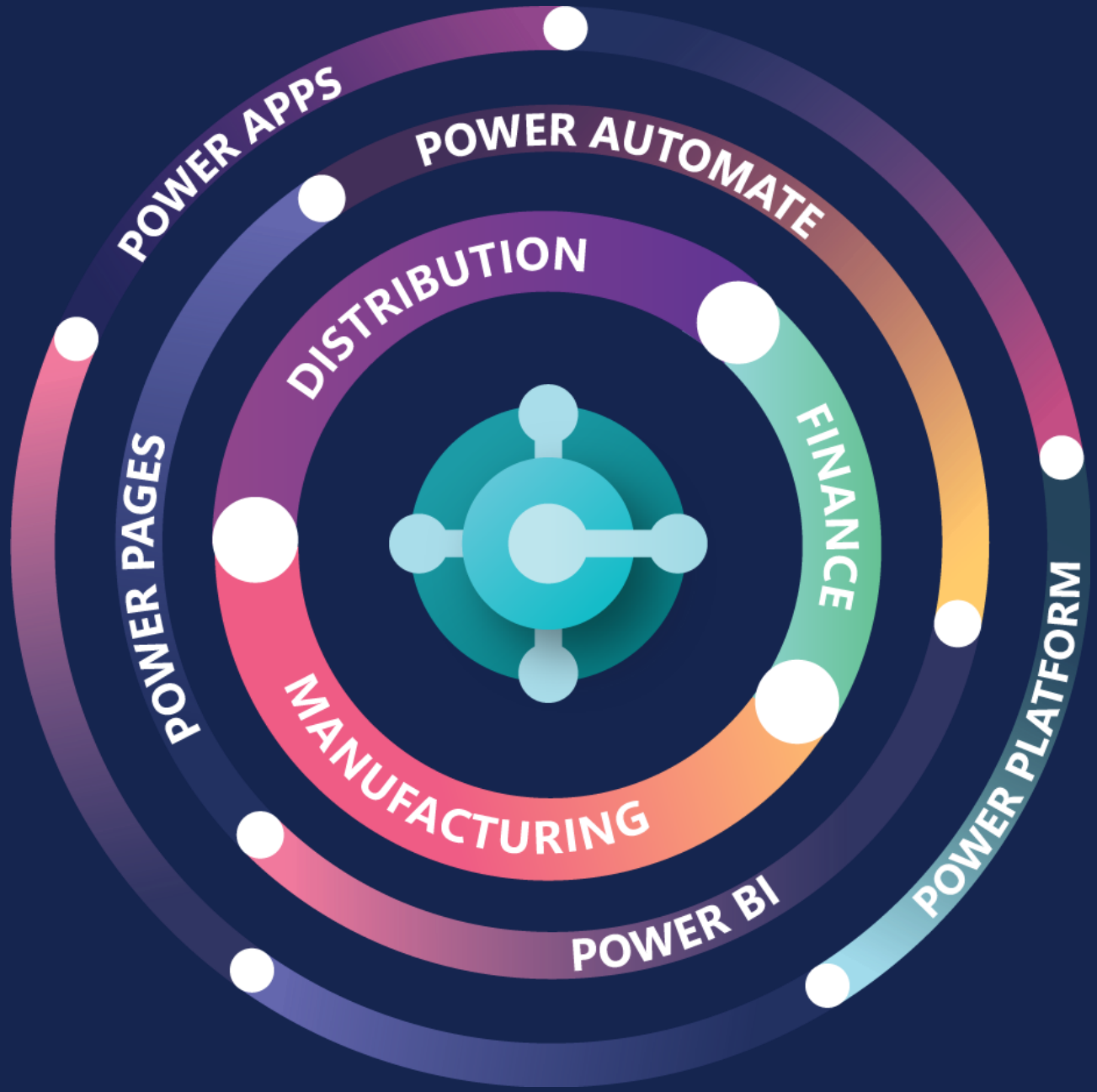
Thank you.

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