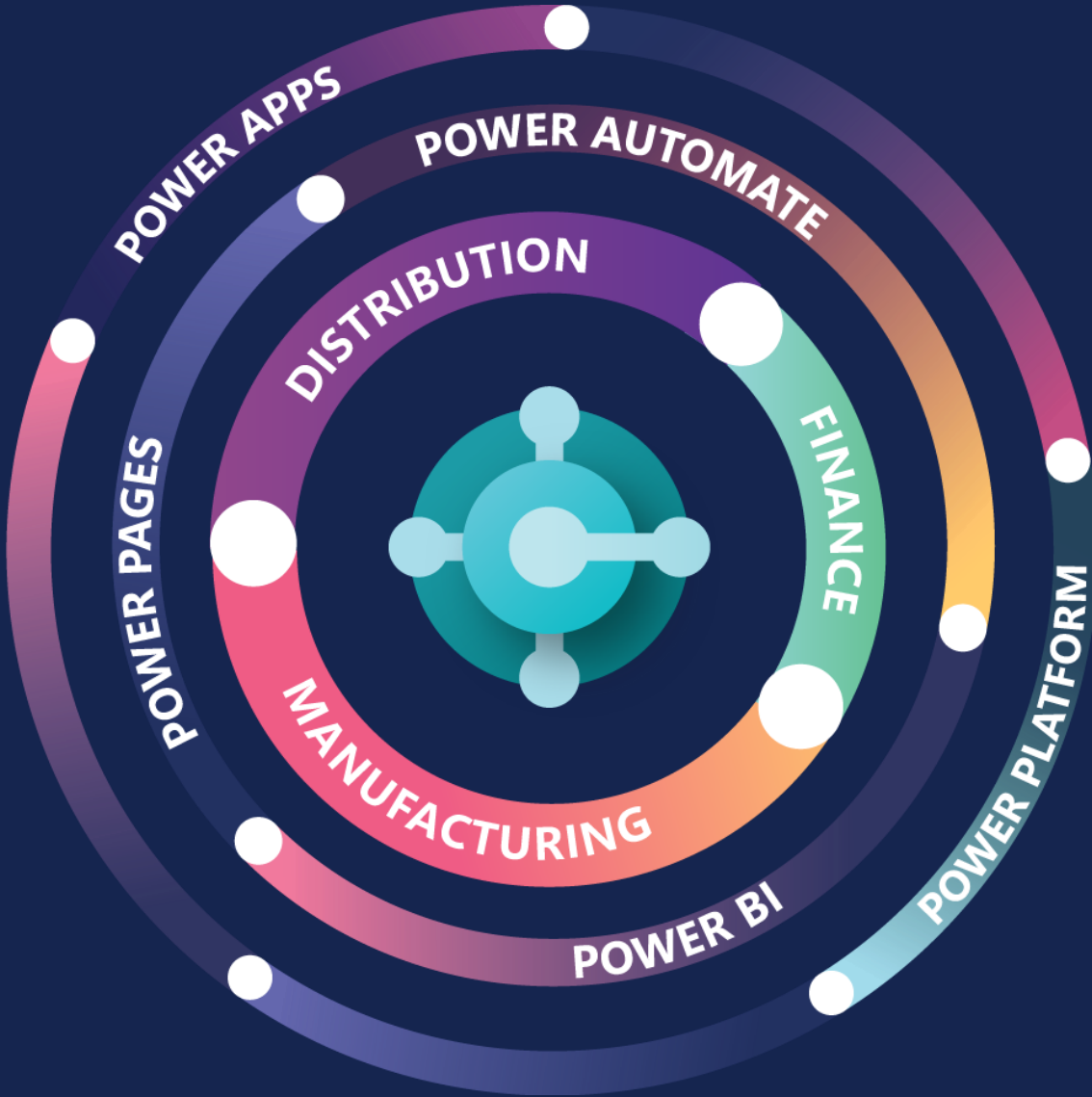


BUSINESS CENTRAL connect

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





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 have 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

The screenshot displays the Microsoft Dynamics 365 Business Central interface for a Purchase Invoice. The main header shows the invoice number '107209' and the vendor name 'Fabrikam, Inc.'. The breadcrumb navigation includes 'Purchase Invoice', 'Posting', 'Request Approval', 'Incoming Document', 'Release', 'Navigate', 'Actions', and 'Related'. The 'General' tab is active, showing fields for Vendor Name (Fabrikam, Inc.), Contact (Krystal York), Posting Date (08/04/2022), Due Date (30/04/2022), Vendor Invoice No. (marked with a red asterisk), and Status (Open). The right-hand pane is titled 'Check Document' and shows a '1' in a teal box representing the 'Issues Total'. Below this, there is a 'Refresh' button and a message: 'Issues: You need to enter the document number of the do...'. The bottom navigation bar includes 'Lines', 'Manage', 'Line', and 'Fewer options'.

Data checking in Standard Business Central



General Ledger Setup

General Posting Tax Bank Journal Templates More options

Check G/L Account U... Off

Mark Cr. Memos as C... Off

LCY Code

Local Currency Symbol

Local Currency Descri...

SEPA Non-Euro Export Off

SEPA Export w/o Ban... Off

Journal Templ. Name ... Off

Enable Data Check On

Enable Data Check
Specifies whether Business Central will validate the data you enter in documents and journals while you work. Messages will be shown in the Journal Check FactBox.
[Learn more](#)

Dimensions

Edit - My Notifications

Edit List

Enabled
Specifies that notifications are enabled.
[Learn more](#)

Notification	Enabled	Conditions
Enable Data Check	<input checked="" type="checkbox"/>	-
→ Show the Document Check FactBox	<input type="checkbox"/>	-

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

Thank you.

BUSINESS CENTRAL
connect

15th & 16th OCTOBER 2024

