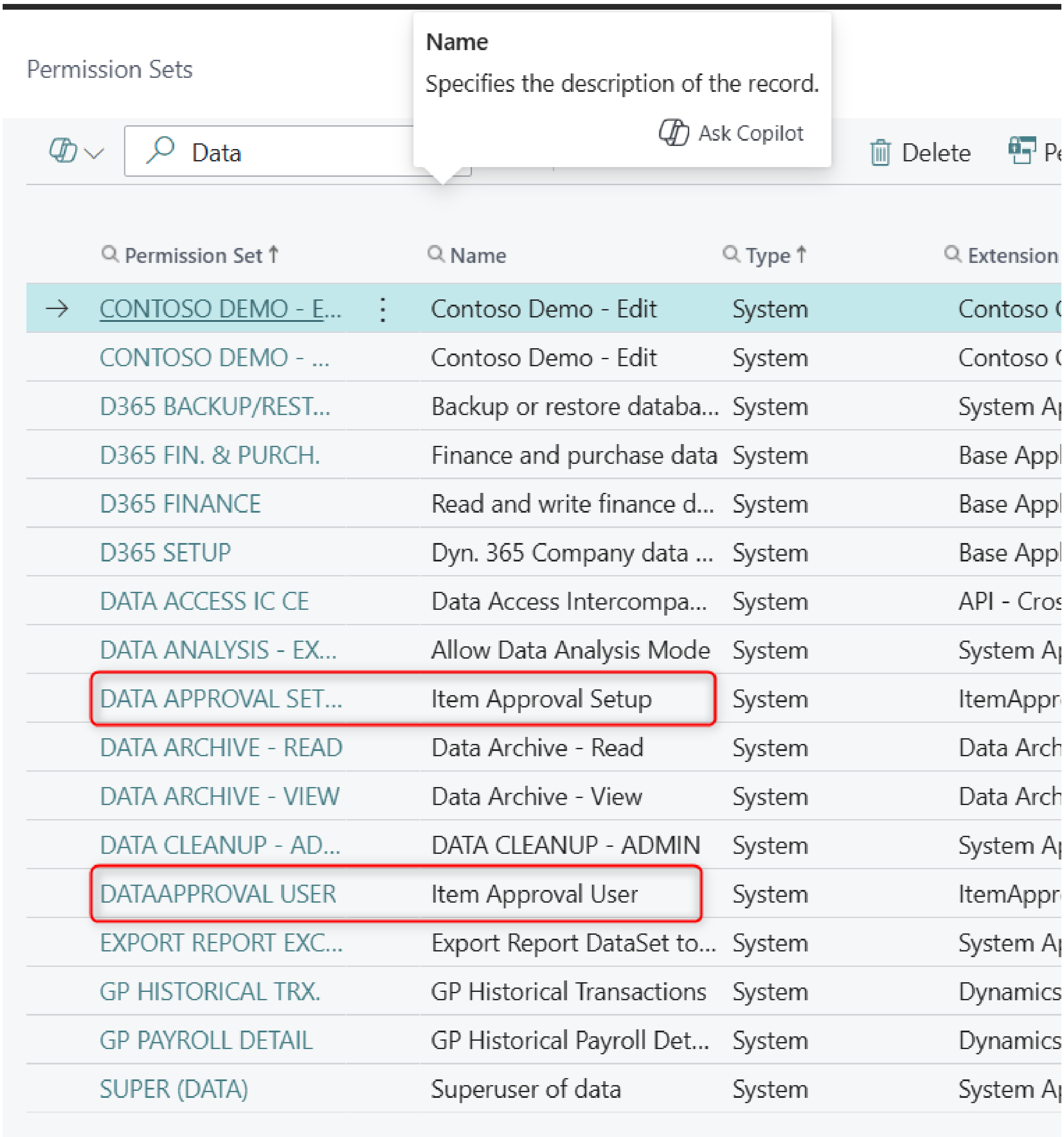
Master Data Team Approvals.

Set up and Configuration.

Permissions


Permission Sets

Name
Specifies the description of the record.
Ask Copilot

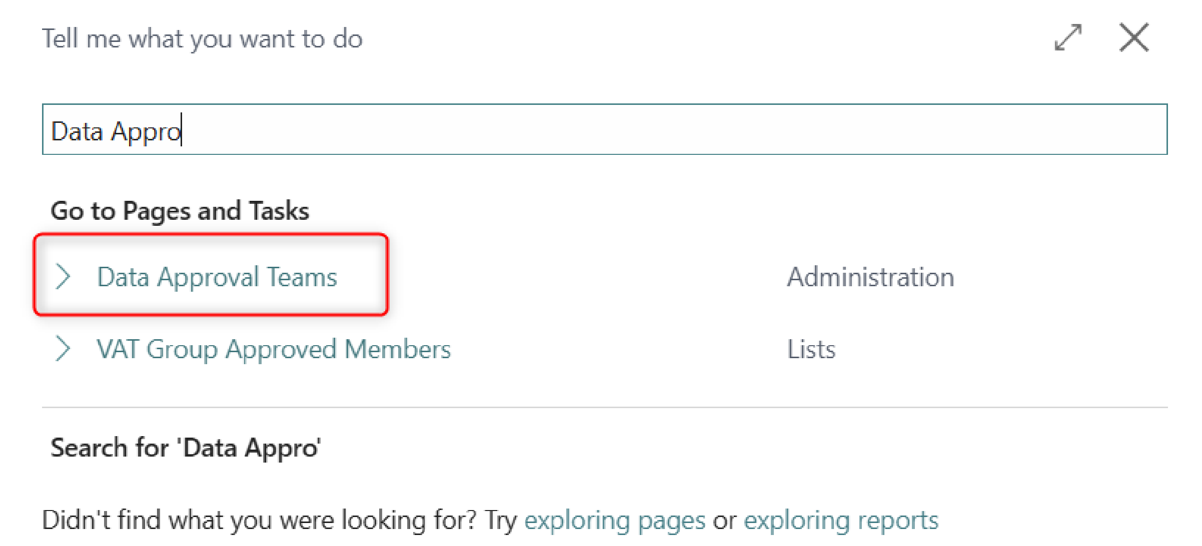
Data
Delete

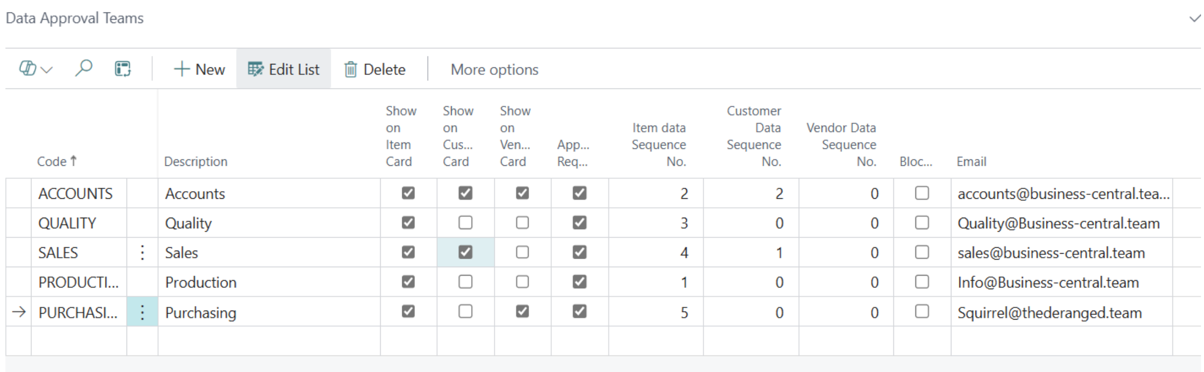
Permission Set ↑	Name	Type ↑	Extension
CONTOSO DEMO - E...	Contoso Demo - Edit	System	Contoso (
CONTOSO DEMO - ...	Contoso Demo - Edit	System	Contoso (
D365 BACKUP/REST...	Backup or restore databa...	System	System Ap
D365 FIN. & PURCH.	Finance and purchase data	System	Base Appl
D365 FINANCE	Read and write finance d...	System	Base Appl
D365 SETUP	Dyn. 365 Company data ...	System	Base Appl
DATA ACCESS IC CE	Data Access Intercompa...	System	API - Cros
DATA ANALYSIS - EX...	Allow Data Analysis Mode	System	System Ap
DATA APPROVAL SET...	Item Approval Setup	System	ItemAppr
DATA ARCHIVE - READ	Data Archive - Read	System	Data Arch
DATA ARCHIVE - VIEW	Data Archive - View	System	Data Arch
DATA CLEANUP - AD...	DATA CLEANUP - ADMIN	System	System Ap
DATAAPPROVAL USER	Item Approval User	System	ItemAppr
EXPORT REPORT EXC...	Export Report DataSet to...	System	System Ap
GP HISTORICAL TRX.	GP Historical Transactions	System	Dynamics
GP PAYROLL DETAIL	GP Historical Payroll Det...	System	Dynamics
SUPER (DATA)	Superuser of data	System	System Ap

There are two permission sets. All approval users must have DATAAPPROVAL USER.

In order to create the teams and assign fields to teams, a user must have the DATAPRROVAL SETUP permission set.

Data Approval Teams.



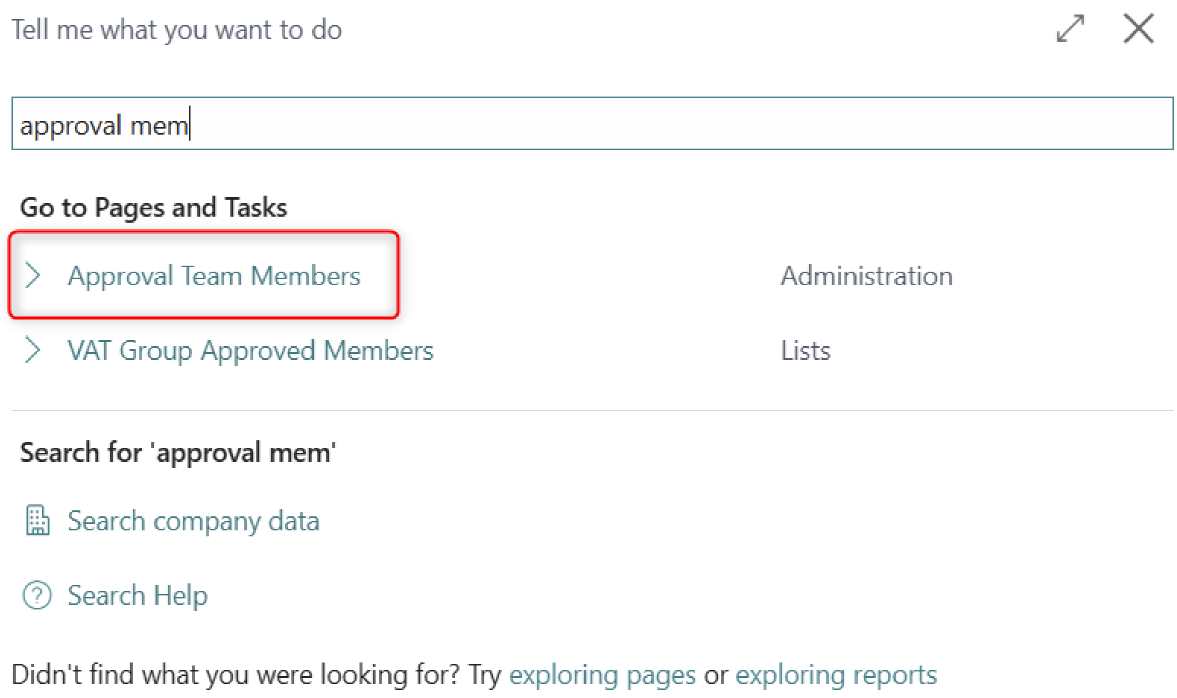


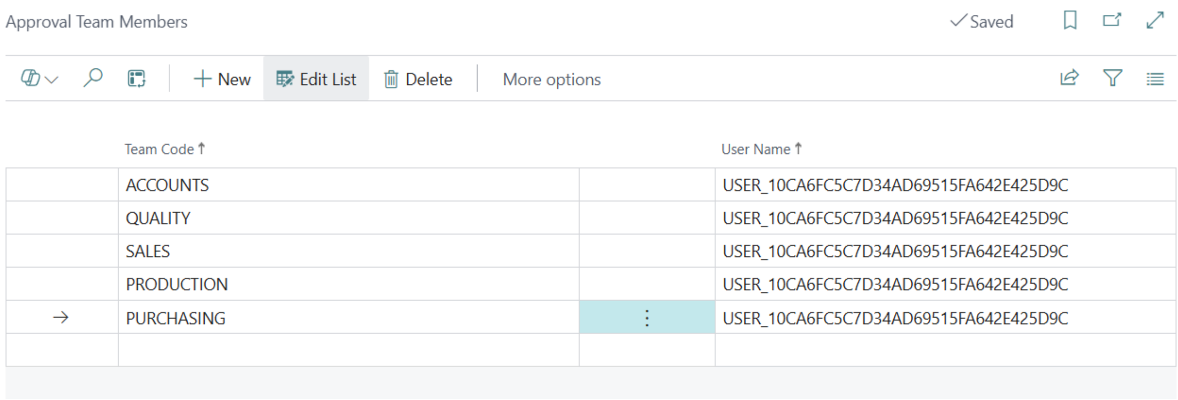
Code ↑	Description	Show on Item Card	Show on Cus... Card	Show on Ven... Card	App... Req...	Item data Sequence No.	Customer Data Sequence No.	Vendor Data Sequence No.	Bloc...	Email
ACCOUNTS	Accounts	☑	☑	☑	☑	2	2	0	☐	accounts@business-central.tea...
QUALITY	Quality	☑	☐	☐	☑	3	0	0	☐	Quality@Business-central.team
SALES	Sales	☑	☑	☐	☑	4	1	0	☐	sales@business-central.team
PRODUCTI...	Production	☑	☐	☐	☑	1	0	0	☐	Info@Business-central.team
PURCHASI...	Purchasing	☑	☐	☑	☑	5	0	0	☐	Squirrel@thederanged.team

Teams are set up here. There are tick boxes for Item, Customer and Vendor. A team will only need to approve if they are ticked. The email should be a distribution list and will be used to send notification emails in two ways.

- When a new record is created, emails will be sent in sequence order (The team at sequence number 1 will be creating the new record, so they will not receive an email. Once approval team who have the sequence number 1 has approved the data, an email will be sent to the team with sequence number 2 etc.
- Each team is responsible for various fields on a record. If any of those fields are edited, then the approval will be cancelled and that team will need to re-approve the record. A notification email will be sent.

Approval Team Members

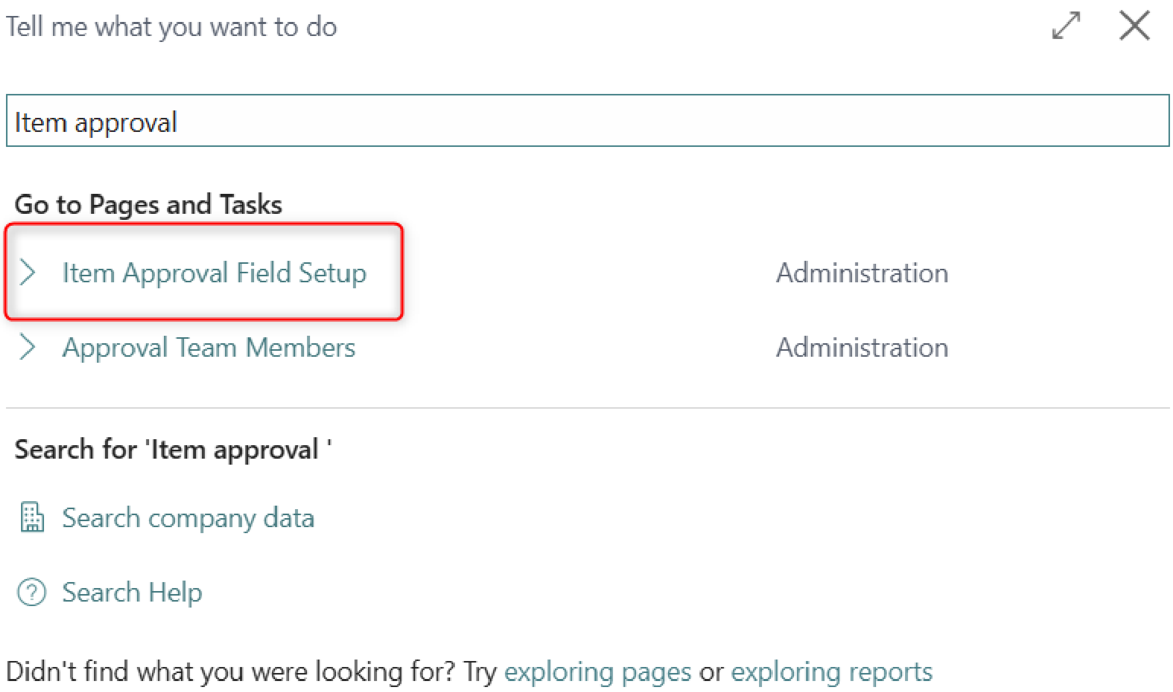


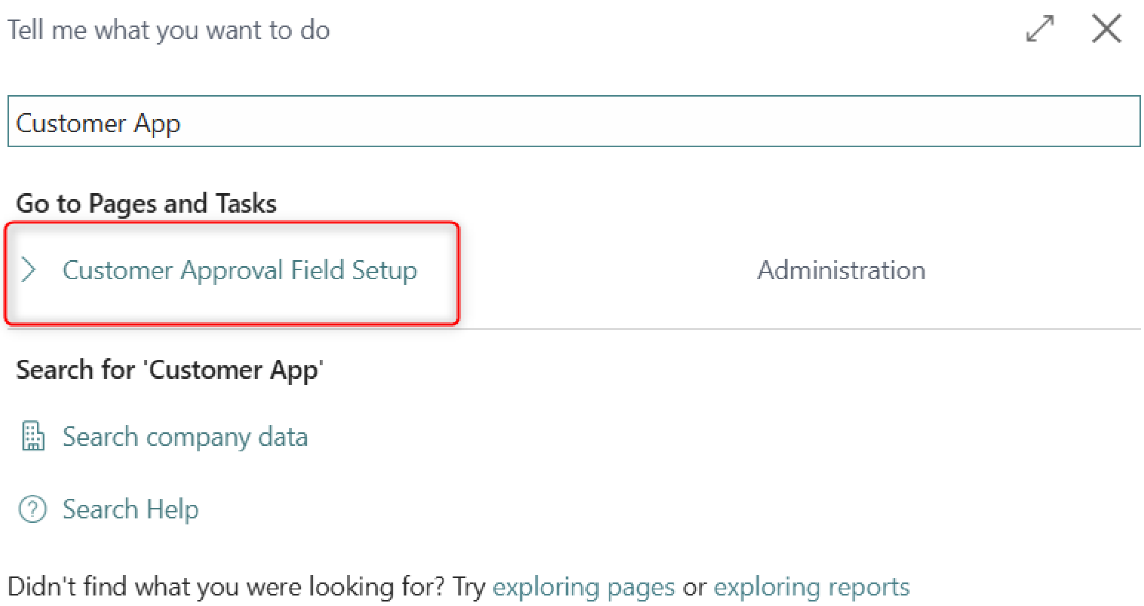


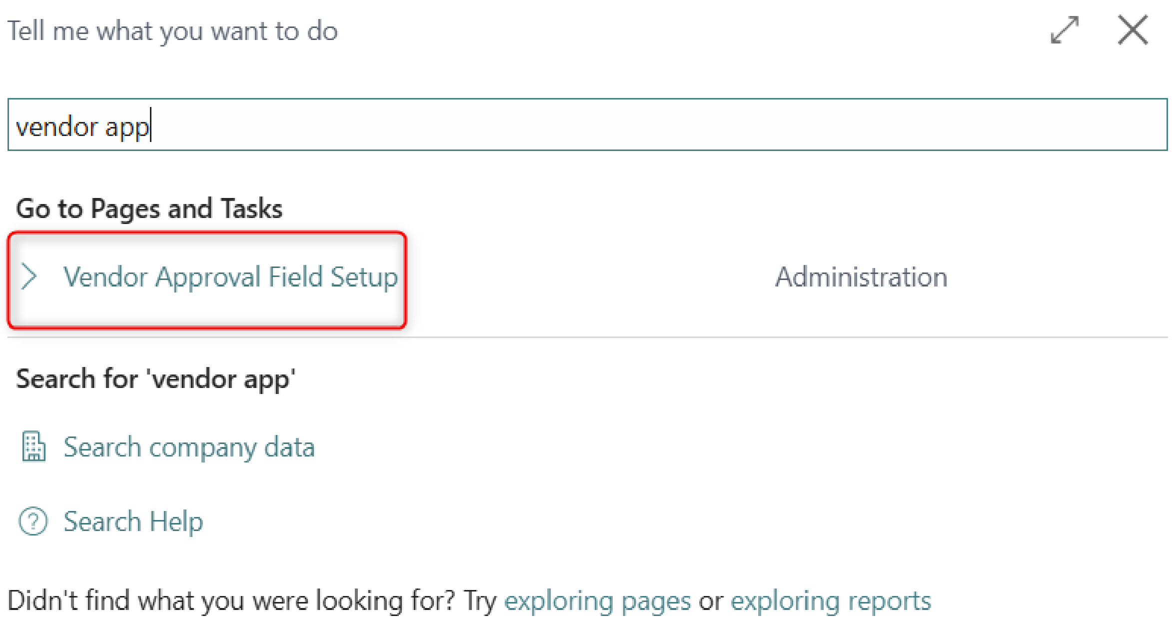
One user can be a member of multiple teams and will be able to complete the approval for each team they are a member of.

Any team member can approve on behalf of that team.

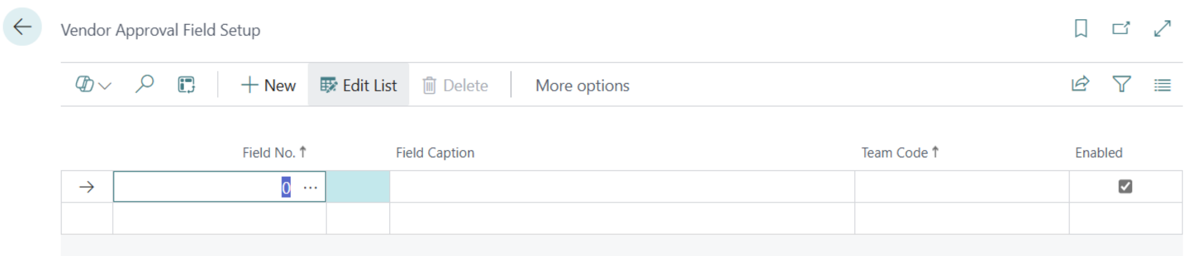
Field Assignment.



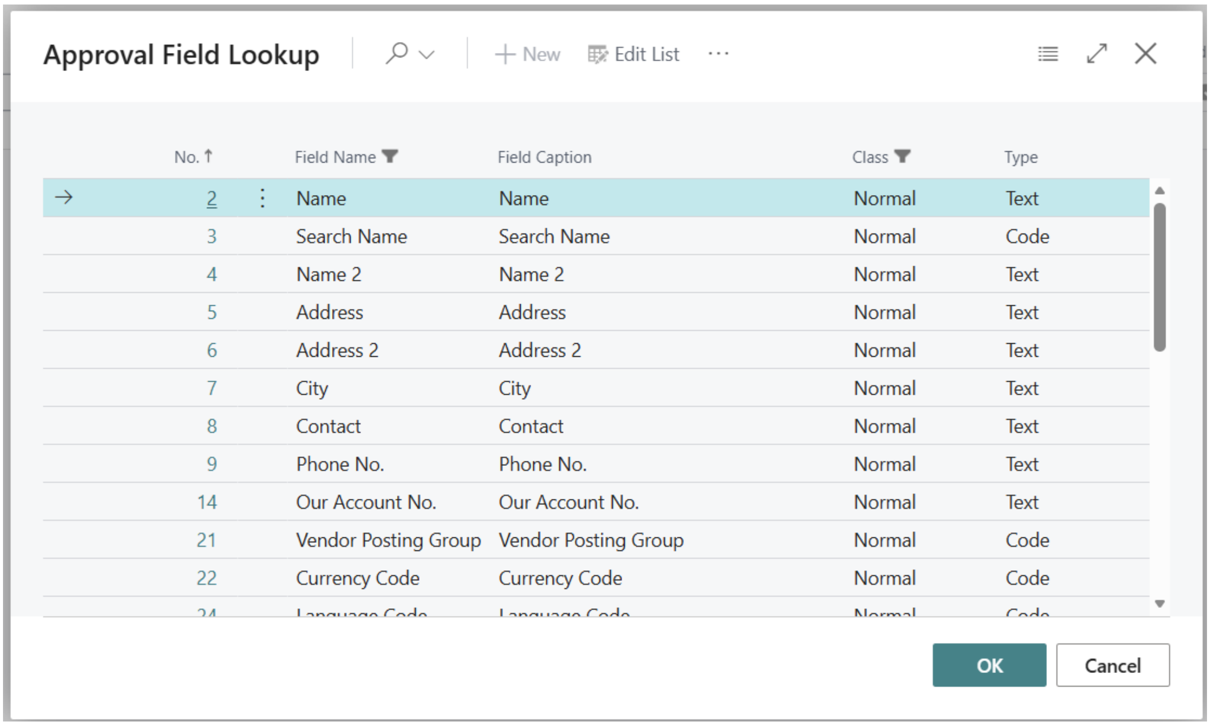




The three areas covered by this extension are Item, Customer and Vendor and assigning fields is the same for all three areas.



Use the ellipses on Field ID. This will open a look up page that contains all the fields on that page. Select the field you want. You can only select fields that are editable.



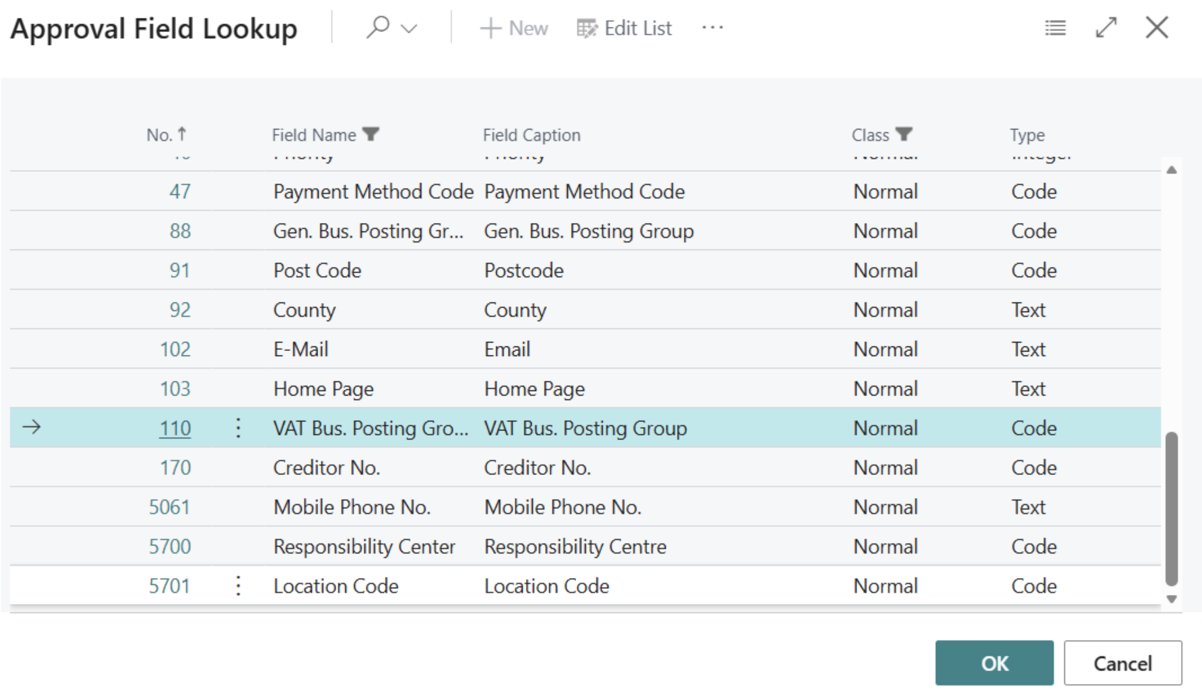
Approval Field Lookup

New Edit List

No.	Field Name	Field Caption	Class	Type
2	Name	Name	Normal	Text
3	Search Name	Search Name	Normal	Code
4	Name 2	Name 2	Normal	Text
5	Address	Address	Normal	Text
6	Address 2	Address 2	Normal	Text
7	City	City	Normal	Text
8	Contact	Contact	Normal	Text
9	Phone No.	Phone No.	Normal	Text
14	Our Account No.	Our Account No.	Normal	Text
21	Vendor Posting Group	Vendor Posting Group	Normal	Code
22	Currency Code	Currency Code	Normal	Code

OK Cancel

You will notice there is no No. field available, this is because you couldn't normally edit that field.



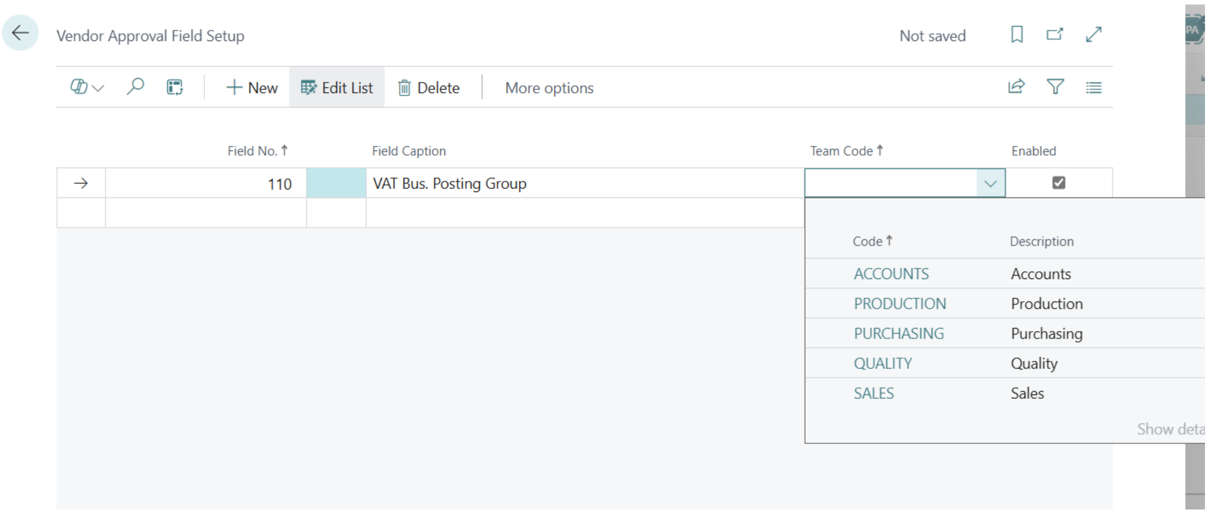
Approval Field Lookup

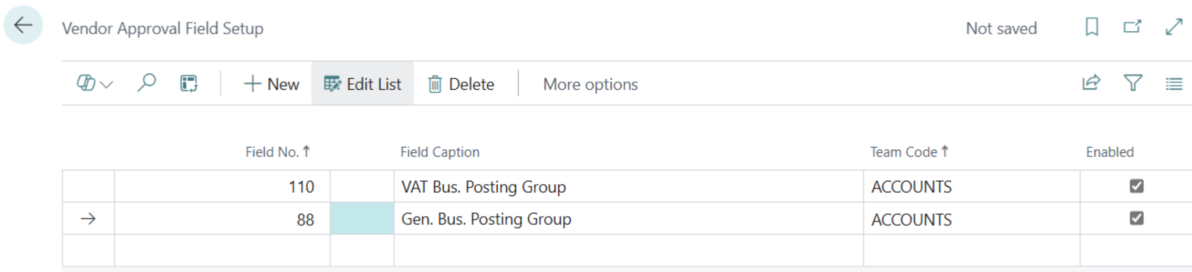
New Edit List

No.	Field Name	Field Caption	Class	Type
47	Payment Method Code	Payment Method Code	Normal	Code
88	Gen. Bus. Posting Gr...	Gen. Bus. Posting Group	Normal	Code
91	Post Code	Postcode	Normal	Code
92	County	County	Normal	Text
102	E-Mail	Email	Normal	Text
103	Home Page	Home Page	Normal	Text
110	VAT Bus. Posting Gro...	VAT Bus. Posting Group	Normal	Code
170	Creditor No.	Creditor No.	Normal	Code
5061	Mobile Phone No.	Mobile Phone No.	Normal	Text
5700	Responsibility Center	Responsibility Centre	Normal	Code
5701	Location Code	Location Code	Normal	Code

OK Cancel

Select the field and click OK. You will have to do this multiple times to ensure all necessary fields are captured.

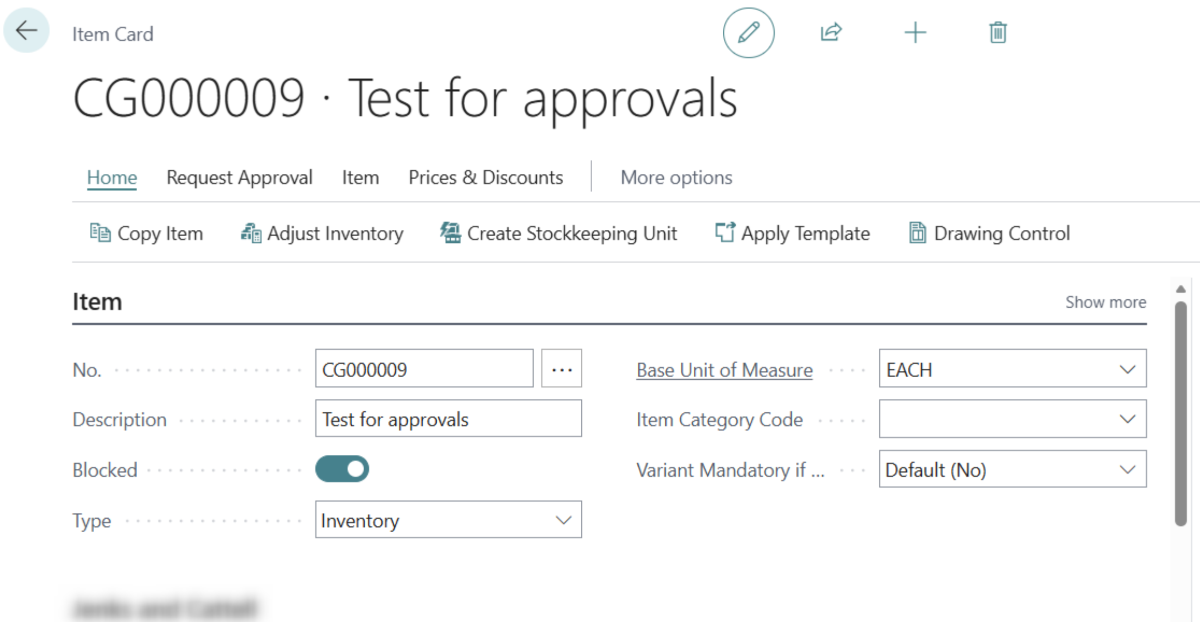


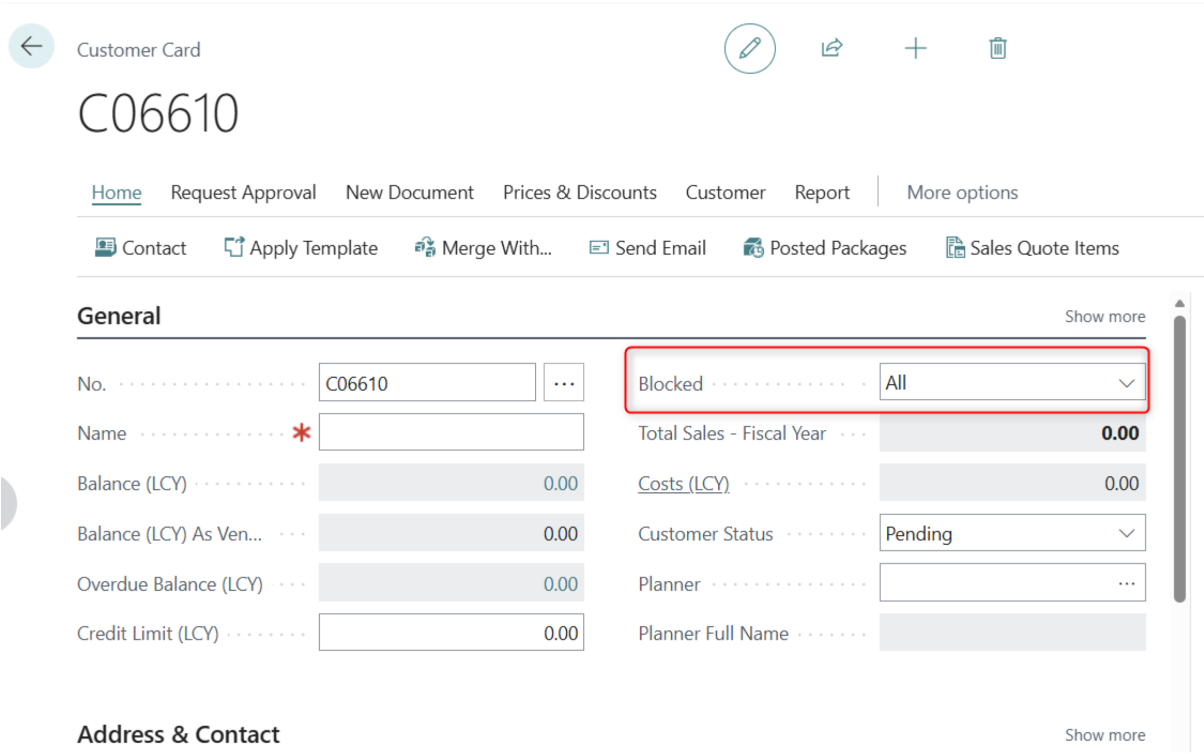


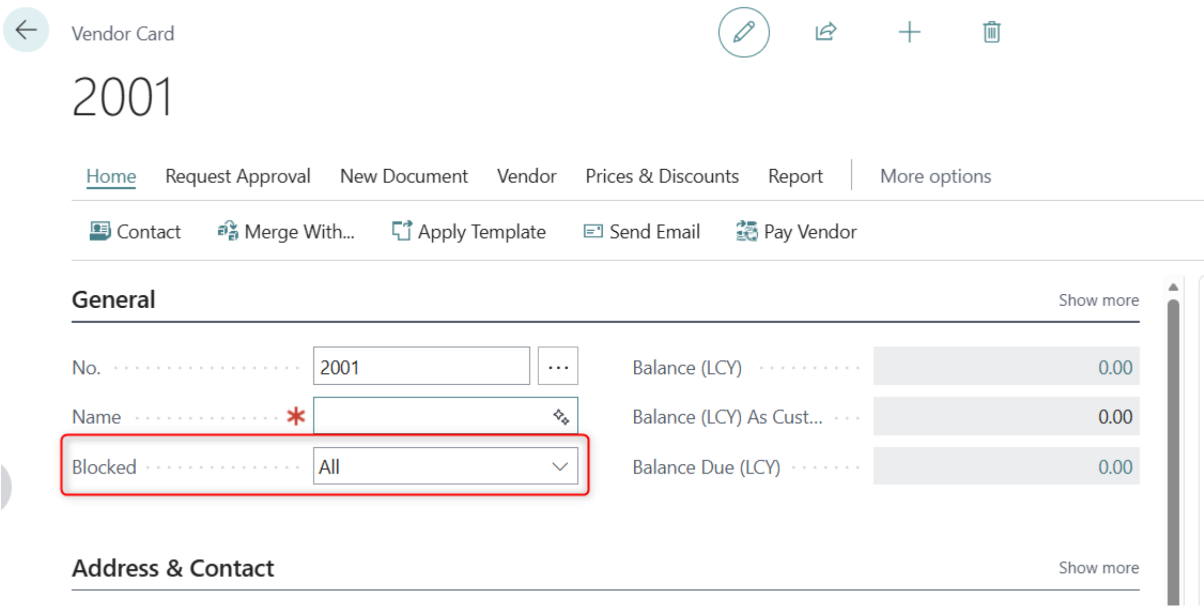
A field cannot be assigned to multiple teams, because there can only be one ultimate owner.

How it works.

When a new record is created, it will appear as blocked.

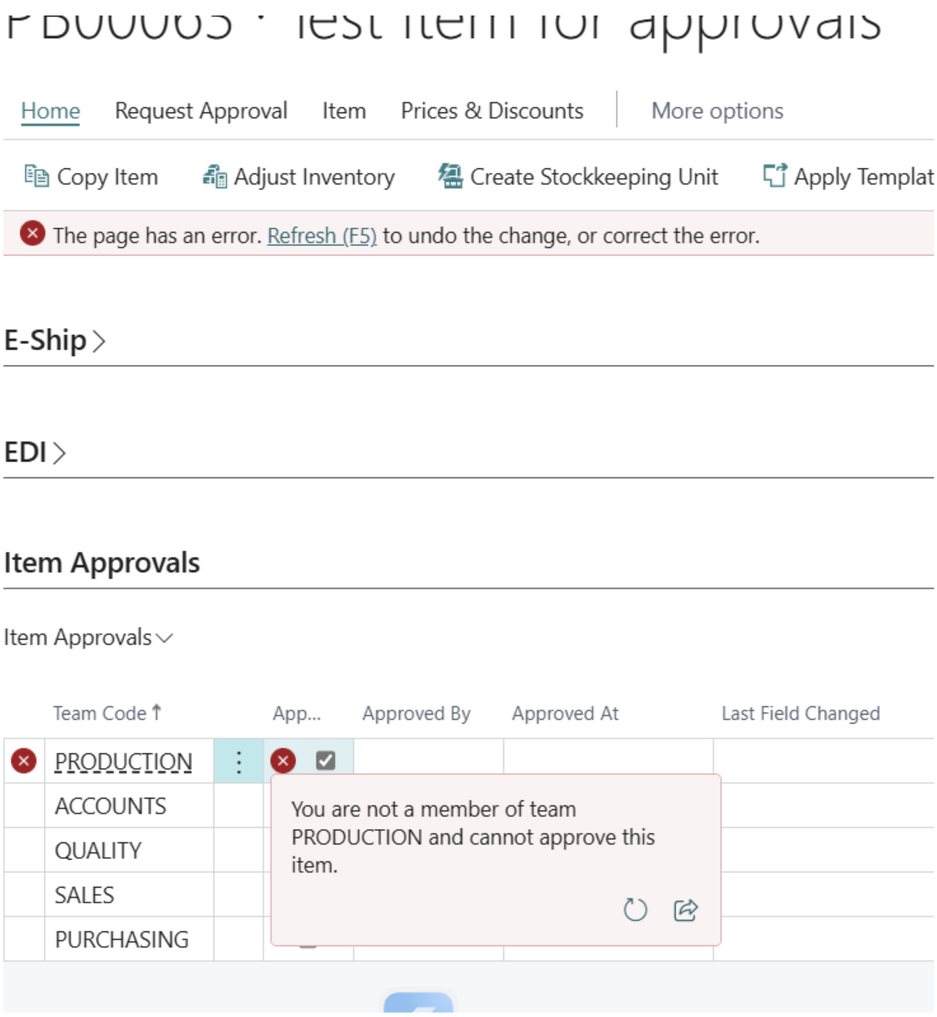



Customer Card
C06610
Home
Request Approval
New Document
Prices & Discounts
Customer
Report
More options
Contact
Apply Template
Merge With...
Send Email
Posted Packages
Sales Quote Items
General
Show more
No.
C06610
Blocked
All
Name
Total Sales - Fiscal Year
0.00
Balance (LCY)
0.00
Costs (LCY)
0.00
Balance (LCY) As Ven...
0.00
Customer Status
Pending
Overdue Balance (LCY)
0.00
Planner
Credit Limit (LCY)
0.00
Planner Full Name
Address & Contact
Show more

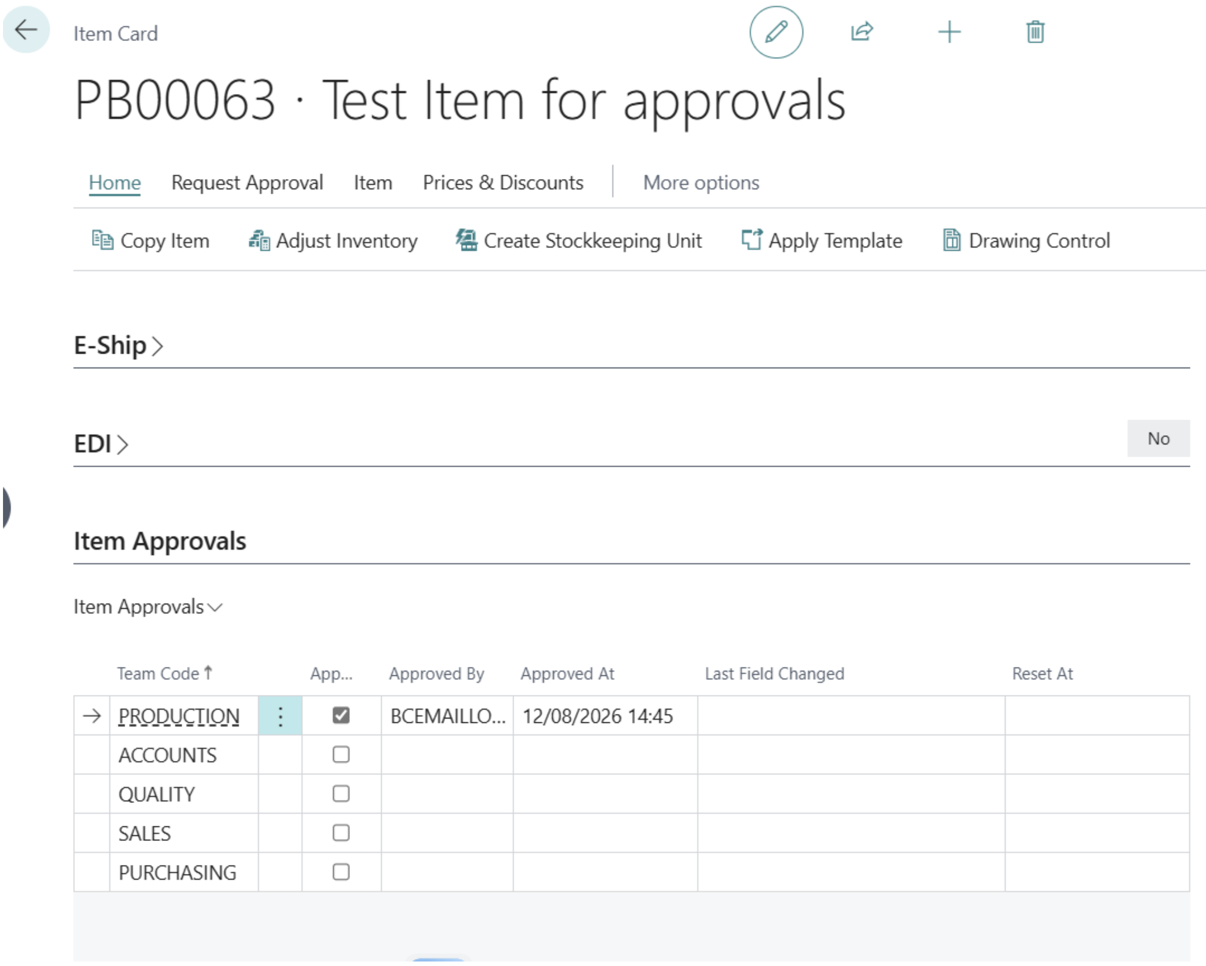

Vendor Card
2001
Home
Request Approval
New Document
Vendor
Prices & Discounts
Report
More options
Contact
Merge With...
Apply Template
Send Email
Pay Vendor
General
Show more
No.
2001
Balance (LCY)
0.00
Name
Balance (LCY) As Cust...
0.00
Blocked
All
Balance Due (LCY)
0.00
Address & Contact
Show more

Approval sequence

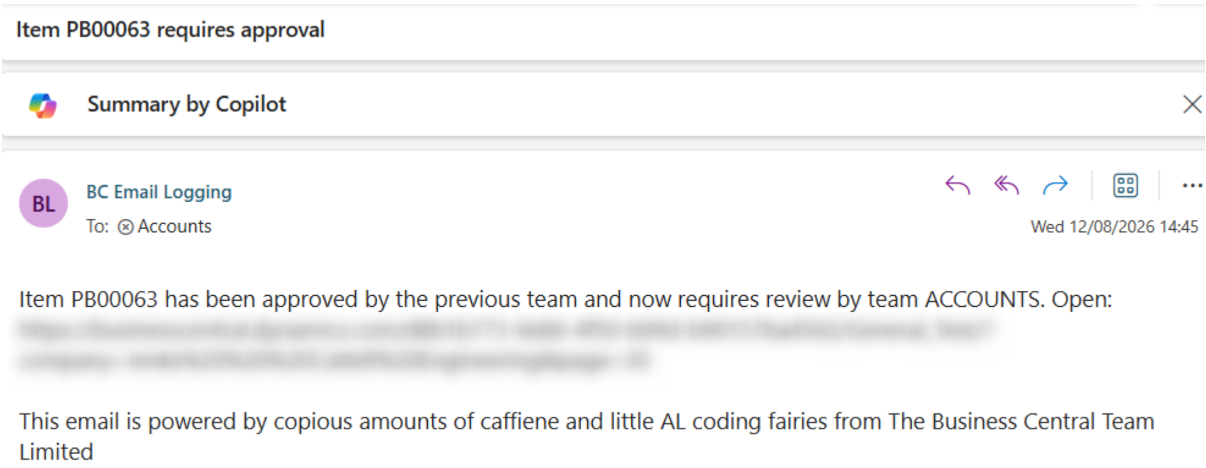
At the bottom of each record, there are tick boxes for each team that must approve the record.



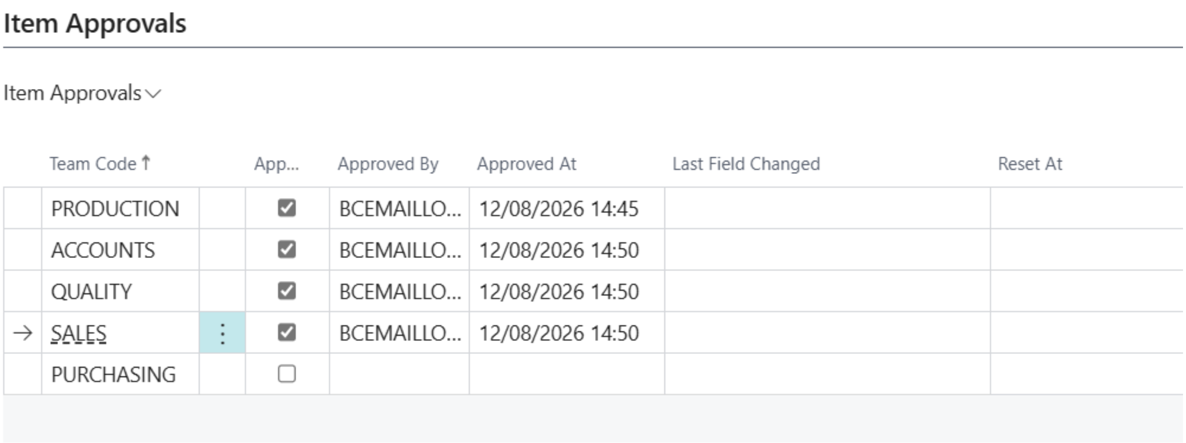
A user must be a member of that team, or they will get an error.



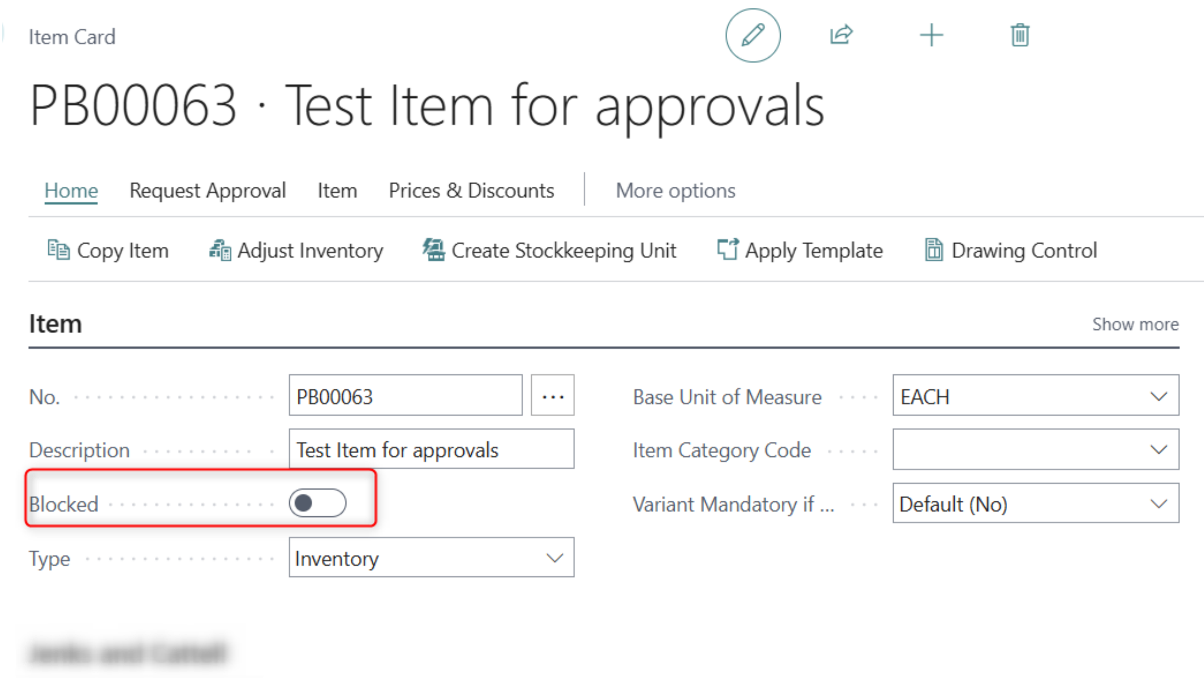
Once they have ticked approve, then the approval is recorded and an email is sent to the next team in the sequence with a link.



The process continues through the sequence, and each team gets an email. (The team that creates the record does not get an email)

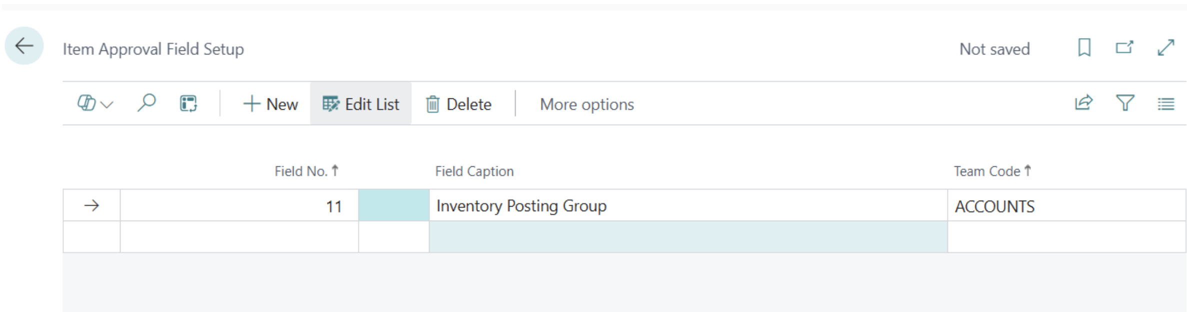


Completing the last approval will automatically unblock the record.

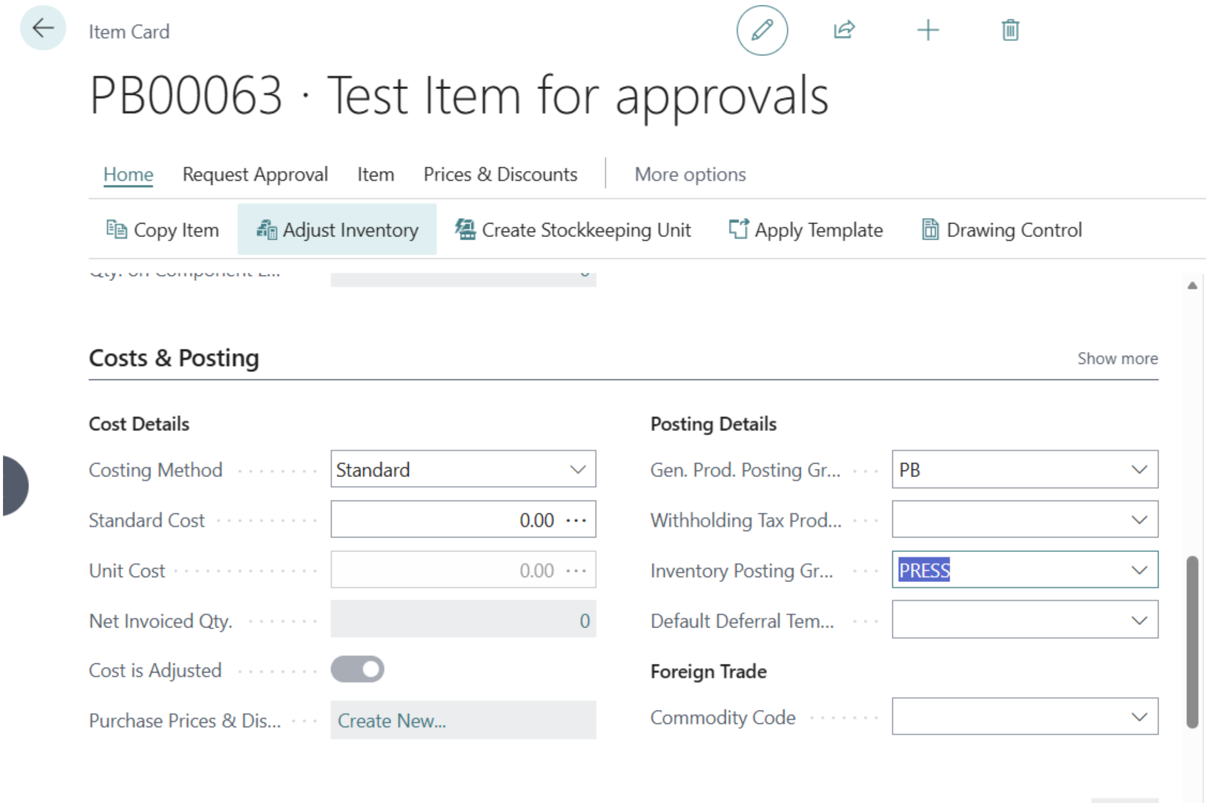


Field Changes.

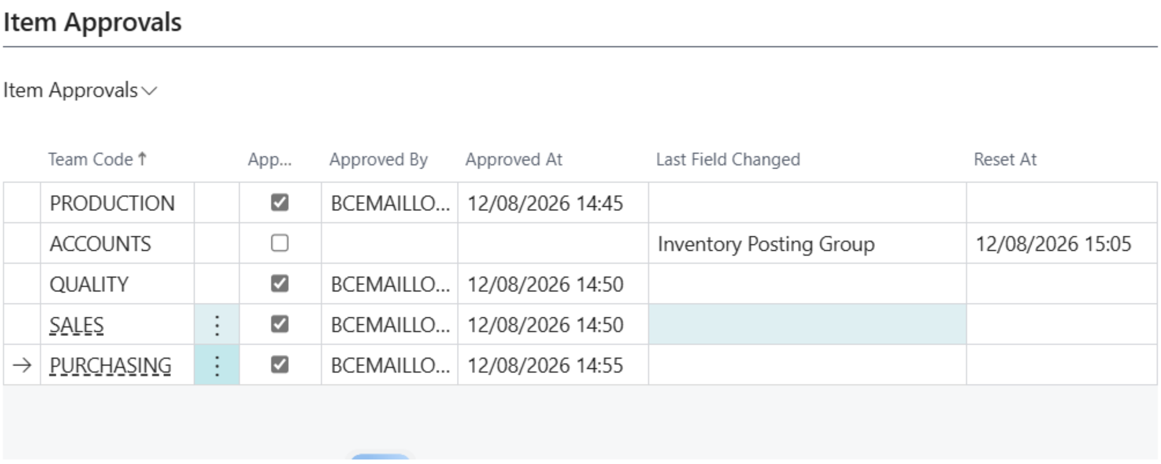
Where a field is assigned to a team;



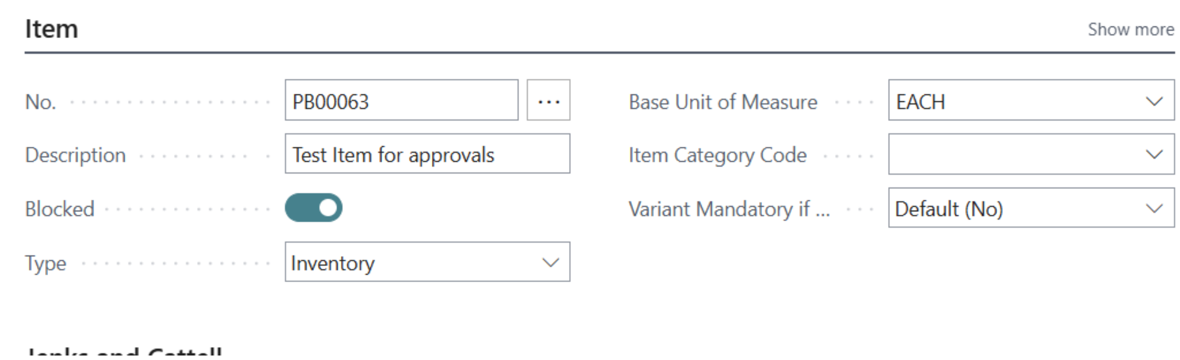
Any change to that field, will first remove the approval for the owning team, sending an email to advise them and will block that record.



Here we have changed the Inventory Posting Group to Press.

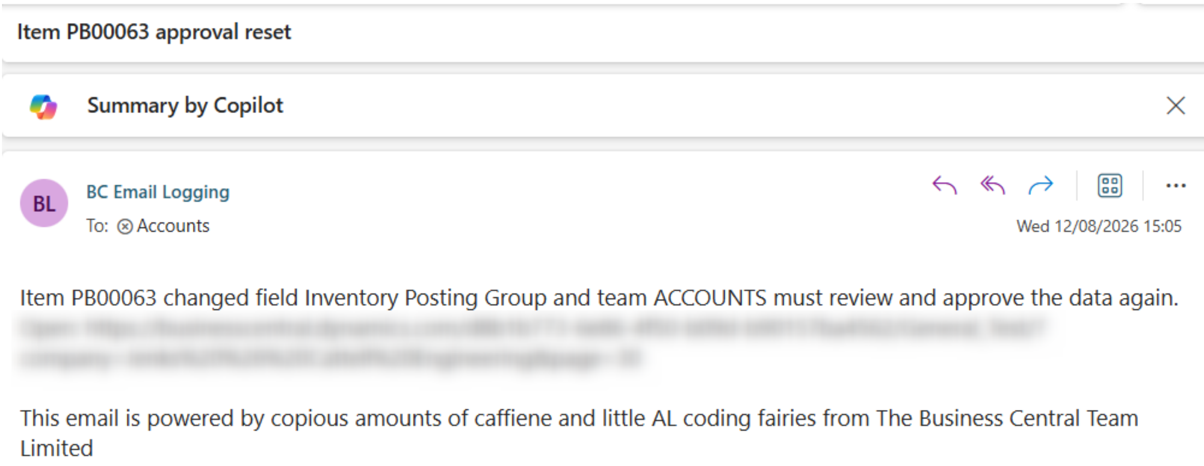


This can be seen in the approvals fast tab.



The item is now blocked, and you are unable to unblock it without approval.

Email sent to the fields owning teamThis



This is the email sent to the fields owning team.