

Master Data Team Approvals.

Set up and Configuration.

Permissions

Permission Sets				
 Data		 Ask Copilot		
		Name Specifies the description of the record.		
		 Delete  Permissions		
Permission Set ↑	Name	Type ↑	Extension	
→ CONTOSO DEMO - E...	Contoso Demo - Edit	System	Contoso C	
CONTOSO DEMO - ...	Contoso Demo - Edit	System	Contoso C	
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.



Data Appro

Go to Pages and Tasks

> Data Approval Teams

> VAT Group Approved Members

Search for 'Data Appro'

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

+ New Edit List Delete More options										
Code ↑	Description	Show on Item Card	Show on Customer Card	Show on Vendor 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

Tell me what you want to do



approval mem

Go to Pages and Tasks

> Approval Team Members

Administration

> VAT Group Approved Members

Lists

Search for 'approval mem'

Search company data

Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

Approval Team Members

✓ Saved



| [+ New](#) [Edit List](#) [Delete](#) | [More options](#)



Team Code ↑		User Name ↑	
	ACCOUNTS		USER_10CA6FC5C7D34AD69515FA642E425D9C
	QUALITY		USER_10CA6FC5C7D34AD69515FA642E425D9C
	SALES		USER_10CA6FC5C7D34AD69515FA642E425D9C
	PRODUCTION		USER_10CA6FC5C7D34AD69515FA642E425D9C
→	PURCHASING	:	USER_10CA6FC5C7D34AD69515FA642E425D9C

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.

Tell me what you want to do



Item approval

Go to Pages and Tasks

> Item Approval Field Setup

Administration

> Approval Team Members

Administration

Search for 'Item approval '

 Search company data

 Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

Tell me what you want to do



Customer App

Go to Pages and Tasks

> Customer Approval Field Setup

Administration

Search for 'Customer App'

 Search company data

 Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

Tell me what you want to do



vendor app

Go to Pages and Tasks

> Vendor Approval Field Setup

Administration

Search for 'vendor app'

Search company data

Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

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

Vendor Approval Field Setup

<

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
24	Language Code	Language 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.



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

Item Approvals

Item Approvals ▾

Team Code ↑	App...	Approved By	Approved At	Last Field Changed	Reset At
→ PRODUCTION	⋮	☐			
ACCOUNTS		☐			
QUALITY		☐			
SALES		☐			
PURCHASING		☐			

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

PROD00005 - Test item for approvals

[Home](#) | [Request Approval](#) | [Item](#) | [Prices & Discounts](#) | [More options](#)

Copy Item Adjust Inventory Create Stockkeeping Unit Apply Template

✖ The page has an error. [Refresh \(F5\)](#) to undo the change, or correct the error.

E-Ship >

EDI >

Item Approvals

Item Approvals ▾

Team Code ↑	App...	Approved By	Approved At	Last Field Changed
✖ PRODUCTION	⋮	✖ ☒		
ACCOUNTS				
QUALITY				
SALES				
PURCHASING				

You are not a member of team PRODUCTION and cannot approve this item.



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

Item Card

PB00063 · Test Item for approvals

Home

Request Approval

Item

Prices & Discounts

More options

Copy Item

Adjust Inventory

Create Stockkeeping Unit

Apply Template

Drawing Control

E-Ship >

EDI >

No

Item Approvals

Item Approvals ▾

Team Code ↑	App...	Approved By	Approved At	Last Field Changed	Reset At
→ PRODUCTION		☒	BCEMAILLO...	12/08/2026 14:45	
ACCOUNTS		☐			
QUALITY		☐			
SALES		☐			
PURCHASING		☐			

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.

Item PB00063 requires approval

Summary by Copilot

BL

BC Email Logging

To: Accounts

←

↶

↷

Wed 12/08/2026 14:45

Item PB00063 has been approved by the previous team and now requires review by team ACCOUNTS. Open:

This email is powered by copious amounts of caffiene and little AL coding fairies from The Business Central Team Limited

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

Item Approvals

Item Approvals

	Team Code ↑		App...	Approved By	Approved At	Last Field Changed	Reset At
	PRODUCTION		☒	BCEMAILLO...	12/08/2026 14:45		
	ACCOUNTS		☒	BCEMAILLO...	12/08/2026 14:50		
	QUALITY		☒	BCEMAILLO...	12/08/2026 14:50		
→	SALES	⋮	☒	BCEMAILLO...	12/08/2026 14:50		
	PURCHASING		☐				

Completing the last approval will automatically unblock the record.

Item Card

PB00063 · Test Item for approvals

Home

Request Approval

Item

Prices & Discounts

More options

Copy Item

Adjust Inventory

Create Stockkeeping Unit

Apply Template

Drawing Control

Item

Show more

No. PB00063 ...

Base Unit of Measure ... EACH ▾

Description Test Item for approvals

Item Category Code ▾

Blocked ☐

Variant Mandatory if ... Default (No) ▾

Type Inventory ▾

Fields used by Control

Field Changes.

Where a field is assigned to a team;

←

Item Approval Field Setup

Not saved

+ New

Edit List

Delete

More options

	Field No. ↑		Field Caption	Team Code ↑
→	11		Inventory Posting Group	ACCOUNTS

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.

←

Item Card

PB00063 · Test Item for approvals

Home

Request Approval

Item

Prices & Discounts

More options

Copy Item

Adjust Inventory

Create Stockkeeping Unit

Apply Template

Drawing Control

Seq. on Component List

Costs & Posting

Show more

Cost Details

Costing Method ······ Standard ▾

Standard Cost ······ 0.00 ···

Unit Cost ·········· 0.00 ···

Net Invoiced Qty. ······ 0

Cost is Adjusted ······ ☐

Purchase Prices & Dis... ··· Create New...

Posting Details

Gen. Prod. Posting Gr... ··· PB ▾

Withholding Tax Prod... ··· ▾

Inventory Posting Gr... ··· PRESS ▾

Default Deferral Tem... ··· ▾

Foreign Trade

Commodity Code ······ ▾

Here we have changed the Inventory Posting Group to Press.

Item Approvals

Item Approvals ▾

	Team Code ↑	App...	Approved By	Approved At	Last Field Changed	Reset At
	PRODUCTION	☒	BCEMAILLO...	12/08/2026 14:45		
	ACCOUNTS	☐			Inventory Posting Group	12/08/2026 15:05
	QUALITY	☒	BCEMAILLO...	12/08/2026 14:50		
	SALES	☒	BCEMAILLO...	12/08/2026 14:50		
→	PURCHASING	☒	BCEMAILLO...	12/08/2026 14:55		

This can be seen in the approvals fast tab.

Item

Show more

No.	PB00063 ...	Base Unit of Measure	EACH ▼
Description	Test Item for approvals	Item Category Code	▼
Blocked		Variant Mandatory if	Default (No) ▼
Type	Inventory ▼		

Task and Detail

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

Email sent to the fields owning teamThis

Item PB00063 approval reset

Summary by Copilot

×

BL

BC Email Logging

To: Accounts

←

↶

↷

...

Wed 12/08/2026 15:05

Item PB00063 changed field Inventory Posting Group and team ACCOUNTS must review and approve the data again.

This email is powered by copious amounts of caffiene and little AL coding fairies from The Business Central Team Limited

This is the email sent to the fields owning team.