DATA SECURITY

ADD WORKFLOWS AND MANDATORY FIELDS
IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

eos
solutions
A KUMAVISION GROUP COMPANY
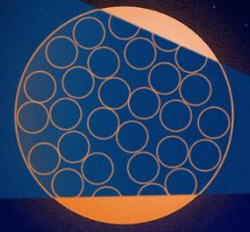
Data Security

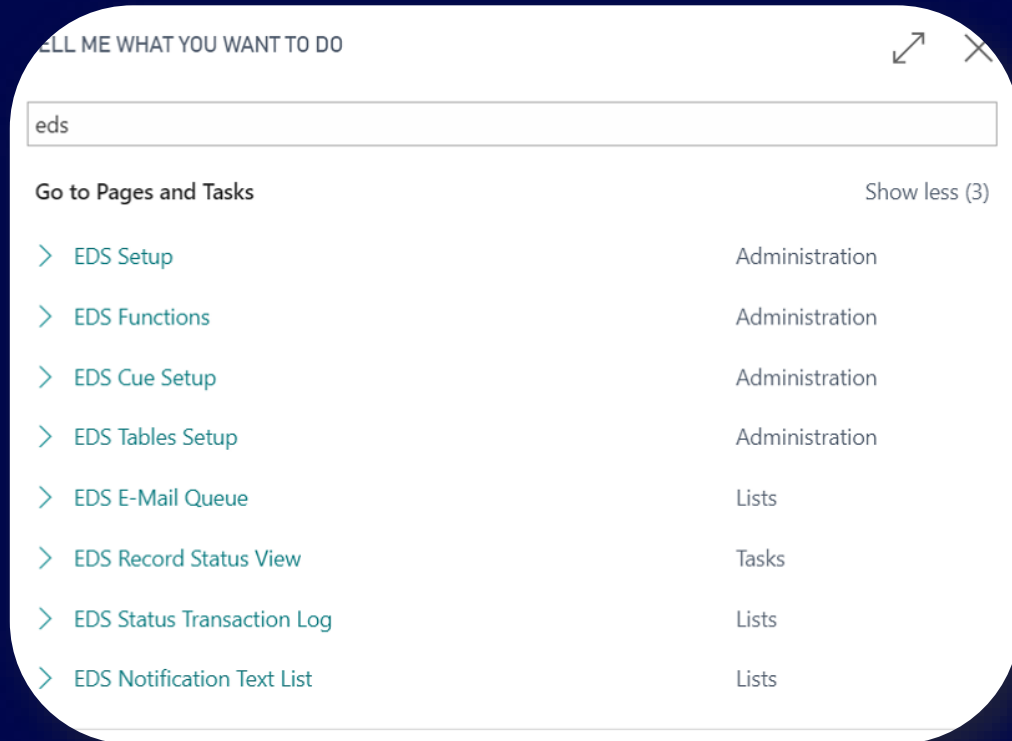### App for Microsoft Dynamics 365 Business Central

DO YOU NEED TO IMPROVE CONTROL AND ACCURACY WITH RECORD-LEVEL VALIDATION AND APPROVAL?

ARE YOU LOOKING FOR A SIMPLE WAY TO ENABLE ONLY CERTAIN USERS TO MODIFY CERTAIN RECORDS?

Data Security EOS Solutions app helps you **protecting important information from accidental modification.** Data Security is the simplest way to add Workflows to master data or document approvals in Microsoft Dynamics 365 Business Central.

Here is a list of the features involved

ELL ME WHAT YOU WANT TO DO

eds

Go to Pages and Tasks   Show less (3)

> EDS Setup   Administration
> EDS Functions   Administration
> EDS Cue Setup   Administration
> EDS Tables Setup   Administration
> EDS E-Mail Queue   Lists
> EDS Record Status View   Tasks
> EDS Status Transaction Log   Lists
> EDS Notification Text List   Lists

ALT + Q and EDS

Block

records that are not completely qualified
(I.E. Customer without VAT No)

Manage

user or group policy and permit to change
record status only to granted people

Send

emails when a record changes status, include context
info, (very easily, without coding)

Create

different approval path for a certain entity. For
example: order quick approval or detailed approvals

Table Setup

Starting from the "EDS Table setup" page administrators can **setup workflows states and paths**. For instance, you can simply define that a record can pass from "NEW" to "CERTIFIED" to "OBSOLETE".

On each status change you can apply predefined functions to check business rules or define mandatory fields or fields rules.

Define Permissions and mandatory fields

During the setup phase (or in demo environment) you can **skip all permission check for all tables.**

After status are set, you can apply permission for each status change to single users or groups.

On Status change you can define mandatory fields and fields rules.

Watch Data Security in action

Change Record Status, inherit color and permission

Certify the Vendor record in "EDS Table Setup", go to Vendor list and start managing the status.

You can change the record status clicking on the upper right "EDS Record Status" factbox and then "Change Status".

Easily Check and Block business activities

For each status you can act on simple checkbox to disable business action like:

1. Modify record data

2. Delete record

3. Print (on documents)

4. Posting (on documents)

5. Release (on documents)

Functions

TYPE	CODE	DESCRIPTION	NOTIFICATION TEXT HEADER CODE
Mail	ALERT		ALERT
Exec	BLOCK_CUSTOMER	Block Customer	
Exec	CHECKDIM_CUSTO...	Check Customer Dimensions	
Exec	ECHKVATREG_CUST	VAT Registration check block	
Exec	UNBLOCK_CUSTOMER	Unblock Customer	
Exec	WCHKVATREG_CUST	VAT Registration check warning	

EDS FUNCTIONS | WORK DATE: 28/01/2021 ✓ SAVED

Search + New Edit List Delete Open in Excel

CODE	DESCRIPTION
BLOCK_CUSTOMER	Block Customer
BLOCK_GLACCOUNT	Block G/L Account
BLOCK_ITEM	Block Item
BLOCK_JOB	Block Job
BLOCK_VENDOR	Block Vendor
CHECKDIM_CUSTOMER	Check Customer Dimensions
CHECKDIM_ITEM	Check Item Dimensions
CHECKDIM_JOB	Check Job Dimensions
CHECKDIM_VENDOR	Check Vendor Dimensions
ECHKVATREG_CONT	VAT Registration check block
ECHKVATREG_CUST	VAT Registration check block
ECHKVATREG_VEND	VAT Registration check block
MESSAGE_ITEM	Item Message
UNBLOCK_CUSTOMER	Unblock Customer
UNBLOCK_GLACCOUNT	Unblock G/L Account
UNBLOCK_ITEM	Unblock Item
UNBLOCK_JOB	Unblock Job
UNBLOCK_VENDOR	Unblock Vendor
WCHKVATREG_CONT	VAT Registration check warning
WCHKVATREG_CUST	VAT Registration check warning
WCHKVATREG_VEND	VAT Registration check warning

For each table you can select and apply business function that comes out of the box.

Bulk updates and monitoring

EDS RECORD STATUS VIEW | WORK DATE: 28/01/2021

GENERAL

Table ID .... 18 ⋯

Document Type .... 0 ▼

FILTERS

DS Status Filter .... ⋯   Filter Field 5

Filter Field 1 ....   Filter Field 6

Filter Field 2 ....   Filter Field 7

Filter Field 3 ....   Filter Field 8

Filter Field 4 ....   Filter Field 9

⟳ Change Status   🔍 Show   ⟳ Synchronization | More options

STATUS CODE		STATUS DESCRIPTION	FIELD 1	FIELD 2	FIELD 3
NEW	⋮	New	01121212	Spotsmeyer's Furnishings	SPOTSMEYER'S FURNISHINGS
NEW		New	01445544	Progressive Home Furnishings	PROGRESSIVE HOME FURNISH...
NEW		New	01454545	New Concepts Furniture	NEW CONCEPTS FURNITURE
NEW		New	01905893	Candoxy Canada Inc.	CANDOXY CANADA INC.
NEW		New	01905899	Elkhorn Airport	ELKHORN AIRPORT
NEW	⋮	New	01905902	London Candoxy Storage Cam...	LONDON CANDOXY STORAGE...
NEW		New	10000	Cannon Group SpA	CANNON GROUP SPA
NEW		New	20000	Grafiche magiche 2000	GRAFICHE MAGICHE 2000
NEW		New	20309920	Metatorad Malaysia Sdn Bhd	METATORAD MALAYSIA SDN B...
NEW		New	20312912	Highlights Electronics Sdn Bhd	HIGHLIGHTS ELECTRONICS SD...
NEW		New	20339921	TraxTonic Sdn Bhd	TRAXTONIC SDN BHD
NEW		New	21233572	Somadis	SOMADIS
NEW		New	21245278	Maronegoce	MARONEGOCE

Administrators can **filter and update record massively** using a specific page.

Use this page also to perform the starting synchronization and set the pre-existing records to "NEW" or a more appropriate status.

Data Security
App for Microsoft Dynamics 365 Business Central

SUBSCRIPTION

Some features of the Data Security app require a subscription.

The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard.

Contact us for more info:

www.eos-solutions.it/en/contact-support.html