



Accelerate Business

What Sets Us Apart

DynaTech's Competitive Advantage

Backed by years of expertise and a team of skilled professionals, DynaTech Systems stands at the forefront of the IT services industry. Our extensive portfolio includes cutting-edge solutions in cloud, ERP and CRM implementation, data analytics, artificial intelligence, and more.

We prioritize long-term partnerships built on collaboration and trust, delivering innovative, scalable, and secure solutions to keep our clients ahead in a rapidly evolving landscape.



150+

Global Projects

100+

Happy Clients

450+

Expert Minds

Microsoft Cloud Capabilities



Cloud



Azure
Infra



Azure
Services



Logic
Apps



Service
Bus



Functions



Event
Grid



API
Management



Synapse
Analytics



Load
Testing



Data
Factory



Business Applications



Marketing



Sales



Finance



SCM



Commerce



Customer
Service



Field
Service



Finance &
Operations



Project
Operations



Human
Resources



Low Code



Power
Pages



AI
Builder



Power
Apps



Power
Automate



Copilot
Studio



Data & BI



Fabric



Dataverse



Power BI



Customer
Insights



OneLake



Data
Engineering



Copilot



Data
Lake



Data
Factory



Data
Science



Data
Warehouse



Lakehouse



Microsoft
Purview



Real-Time
Intelligence

Agenda of this Presentation

1. Why Master Data Management Is Critical for Enterprise Success
2. Master Data Control
3. Master Data Change Management
4. Master Data Access Control
5. Seamless Audit Logging
6. Data Health Audit Rule

Data Governance & Compliance

- › Enforce global and local control policies.
- › Ensure audit readiness with traceable change logs.
- › Meet regulatory requirements (e.g., SOX, GDPR).

Controlled Change Management

- › Route change requests through dynamic approvals.
- › Assess impact across companies and open transactions.
- › Maintain a full audit trail of what changed, when, and by whom.



Data Health & Audit Logging

- › Enforce mandatory fields, validations, and completeness rules.
- › Detect duplicates, inconsistencies, and stale records.
- › Validate formats for tax, currency, and contact details.
- › Maintain audit trails and on-demand access to change history.

Role-Based Access & Accountability

- › Define who can create, edit, or delete master data.
- › Limit sensitive actions like bulk updates to authorized users.
- › Centralize stewardship through user groups.

Take Control of Your Master Data with Confidence

Empower your organization with a robust, scalable framework for Master Data Governance tailored for Dynamics 365 Finance & Operations.

Define and enforce master data policies globally or at the company level to ensure consistency, compliance, and control across all business units.

Global Master Data Harmonization



Ensure data quality from the ground up by marking essential fields as mandatory. Prevent incomplete records from entering the system and disrupting downstream processes.

Role-Based Data Stewardship



Implement flexible workflow automation that adapts to business context, master type, and data sensitivity—ensuring the right level of review and accountability.

Pre-Usage Validation & Enforcement



Centralized Policy Management

Identify and elevate critical master records—such as Customers, Vendors, and Products—as global entities to drive standardization across your enterprise landscape.



Field-Level Governance

Assign user groups or centralized data teams to manage specific master data segments. Empower them with the right access to update only what falls within their domain.



Dynamic, Rules-Driven Approval Workflows

Block records from being used in operational transactions until they are fully approved and authorized—safeguarding your processes from unverified or incomplete data.

Master Data Change Management — Controlled, Transparent, Accountable

Transform the way your organization handles master data changes with a powerful, workflow-driven change management framework built for enterprise scalability.

01

Structured Change Requests

Enable users to initiate formal change requests for critical master data such as customers, vendors, products, or financial dimensions—ensuring traceability and governance at every step.

02

Intelligent Approval Routing

Drive efficiency and compliance with dynamic approval workflows tailored to the nature and risk profile of the requested change. Automatically route requests to the appropriate stakeholders or specialized data steward groups based on predefined rules.



04

Cross-Company Impact Assessment

Keep stakeholders in the loop with automated notifications at each stage of the change process. Ensure full transparency with a comprehensive audit trail capturing who changed what, when, and why.

03

Real-Time Notifications & Audit Trail

Gain instant visibility into the downstream impact of a change—see which companies, legal entities, or open transactions are linked to the data being impacted. Make informed decisions with dependency awareness built into every request.

Master Data Access Control — Transparent, Granular, Secure

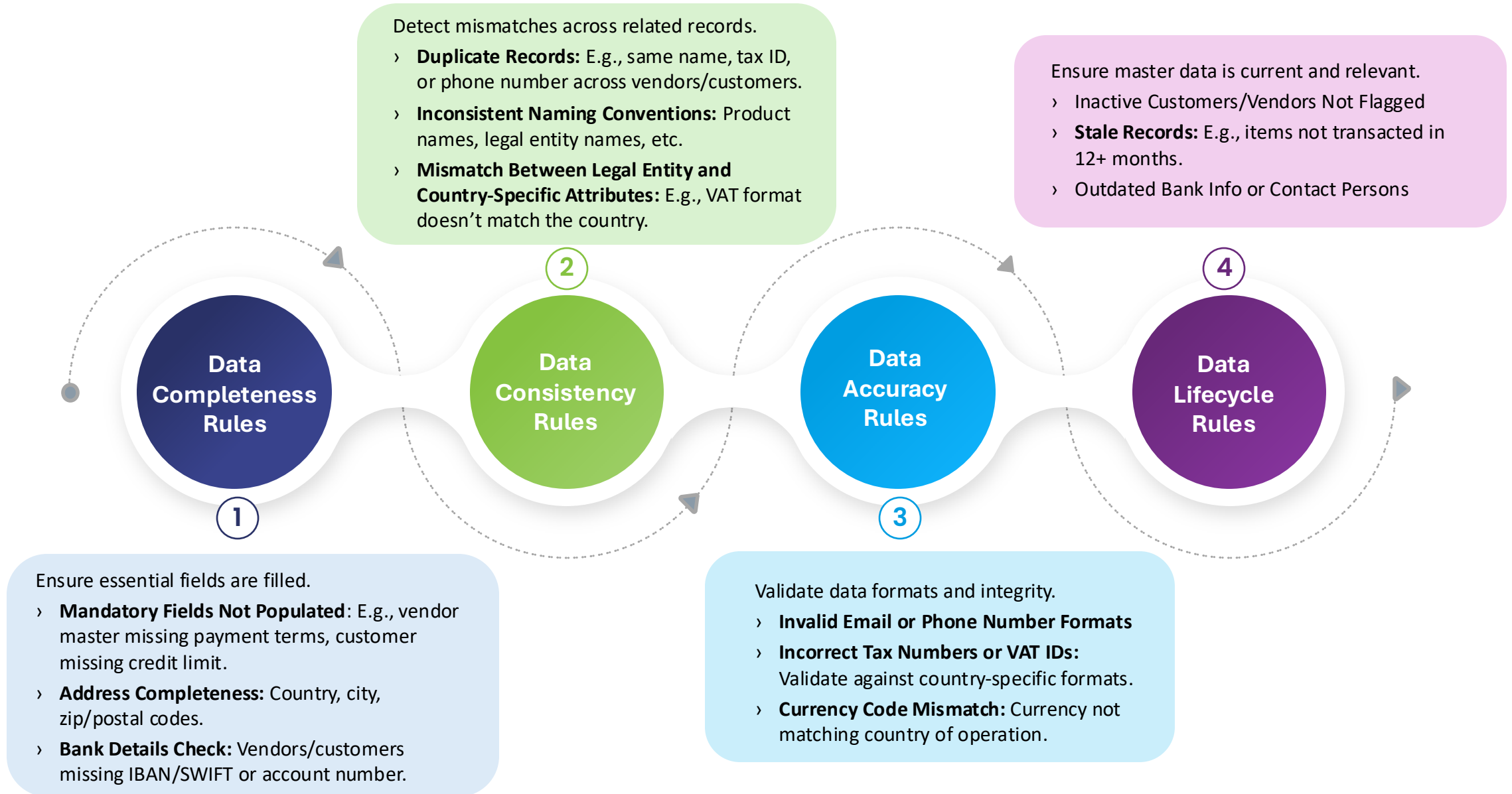
Ensure accountability and control with a robust framework to manage who can access, create, or modify your critical master data.

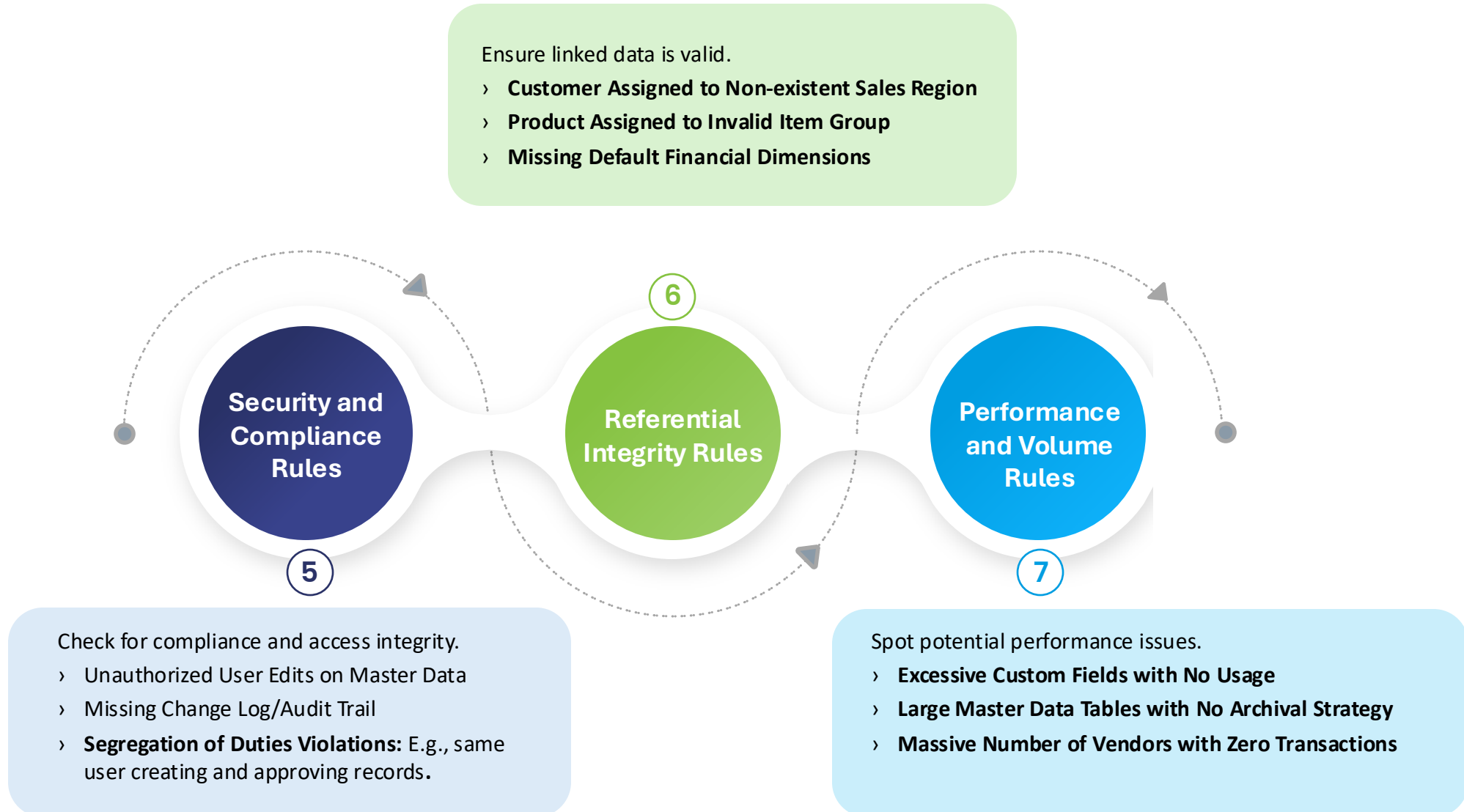


Seamless Audit Logging — Always Ready, Always Traceable

Stay compliant and in control with built-in, transparent audit logging designed for master data governance at scale.







The screenshot shows the Dynamics 365 Finance and Operations Master data setup interface. The 'Standard view' is selected, and a table of menu items is displayed. The first row, 'Item - Release product', is highlighted with a red box.

☐	Form Name	Menu item name	Menu item type
☒	Item - Release product	EcoResProductDetailsExtendedGrid	Display
	Item Journal	InventJournalTableProject	Display
	Item Requirements	ProjSalesItemReq	Display

User security configuration

Standard View * v

Filter

User Id	User Name	Designation	Department	Email Id	Role	Sub Role	Duty	Privilege	Resource
☐ aaron.medina	Aaron Medina	Technical Services	United Kingdo...	aaron.medin...	Envu_AccountsPayable_Inquiry		Inquire into purchase order to invoice policies	View Released products	Menu item
☐ aarushi.shah.ext	Aarushi Shah	Global Process Improve...	Romania	aarushi.shah...	ENVU_View_Only		ENVU_Duty_View_Only	ENVU_Privilege_View_Only	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Purchasing manager		Inquire into product purchase prices and discount master	View Released products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Accounts receivable manager		Enable quotation to sales order process	Manage Released products details	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Accounts receivable manager		Enable quotation to sales order process	View Released products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Accounts receivable manager		Inquire into quotation to sales order policies	View Released products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Purchasing agent		Maintain approved vendors	View Released products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Purchasing agent		Maintain product prices and discount master	View Released products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Accounts payable manager		Inquire into purchase order to invoice policies	View Released products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Discovery Purchasing Manag...		Inquire into product purchase prices and discount master	View Released products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Discovery Purchasing Agent		Maintain Inquire into product purchase prices and discount master	Used products	Menu item
☐ aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Discovery Purchasing Agent		Maintain product prices and discount master	View Released products	Menu item
☐ abhijit.baruah	Abhijit Baruah	Key Acct Mgr	China	abhijit.barua...	Envu_SalesAndMarketing_In...		Inquire into quotation to sales order policies	View Released products	Menu item
☐ abhijit.baruah	Abhijit Baruah	Key Acct Mgr	China	abhijit.barua...	Envu_SalesAndMarketing_In...		Inquire into sales return order progress	View Released products	Menu item
☐ abhijit.baruah	Abhijit Baruah	Key Acct Mgr	China	abhijit.barua...	Envu_SalesAndMarketing_In...		Inquire into product sales prices and discount master	View Released products	Menu item
☐ achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Maintain warehouse operation master	View Released products	Menu item
☐ achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into warehouse operation master	View Released products	Menu item
☐ achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into RFID/barcode master	View Released products	Menu item
☐ achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into products for operations master	View Released products	Menu item
☐ achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Inventory accountant clerk		Maintain BOM calculation master	View Released products	Menu item

Finance and Operations | Secure D365 > Security User Trace Details > User security configuration

AR01

← Edit Delete Update View Permission Users Options

User security configuration

Standard View * v

Filter

	Privilege	Resource Type	Context/Resource	Read	Update	Create	Delete	Invoke	License	Assignment Status	Enabled
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	ENVU_Privilege_View_Only	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
it master	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	Manage Released products details	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Allow	Allow	Allow	Unset	Operations	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
it master	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
aster	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true

Enable Log Form

The user can enable logs based on the master records (Item, Customer, and Vendor). All related tables will appear based on the policy form in the related tables grid, and selecting a table will display its associated fields.

Finance and Operations Search for a page USMF ? AD

Standard view ▾
Enable Logs

Module
Customer ▾

RELATED TABLES

☐	Table name
☒	CustTable
☐	CustTableTmpFilter
☐	CustCollectionsContact
☐	DirPersonName
☐	DirPartyTable
☐	DirPartyTable_DirOrganizationBase
☐	DirPartyTable_DirOrganization
☐	DirPartyTable_OMInternalOrganization
☐	DirPartyTable_OMOperatingUnit
☐	DirPartyTable_CompanyInfo
☐	DirPartyTable_OMTeam
☐	DirPartyTable_DirPerson
☐	mcrMessageAssociation
☐	TaxInformationCustTable_IN
☐	RetailCustTable
☐	CustDirectDebitMandate
☐	MCRCustTable
☐	WHSCustTable

RELATED FIELDS

☐	Field name	Enabled
☒	PaymTermId	☒
☐	LineDisc	☒
☐	TaxWithholdGroup_TH	☐
☐	PartyCountry	☐
☐	AccountNum	☐
☐	AccountStatement	☐
☐	Affiliated_RU	☐
☐	AgencyLocationCode	☐
☐	BankAccount	☐
☐	BankCentralBankPurpose...	☐
☐	BankCentralBankPurposeT...	☐
☐	BankCustPaymIdTable	☐
☐	BirthCountyCode_IT	☐
☐	BirthPlace_IT	☐
☐	Blocked	☐
☐	CashDisc	☐
☐	CashDiscBaseDays	☐
☐	CCMNum_BR	☐

Finance and Operations

Search for a page

USMF

Easy Log View

Standard view * ▾

Filter

Check date

OK

	Reference ...	Table name	Company	Log type	Created by	Creator na...	Record	Field name	Old value	New value	Created date and time
	8649	Items	usmf	Insert	Admin	Admin	DT MDM	ItemId		DT MDM	6/23/2025 7:03:28 AM
	8649	Items	usmf	Insert	Admin	Admin	MDM BI 01	ItemId		MDM BI 01	6/23/2025 5:31:31 AM
	8649	Items	usmf	Update	Admin	Admin	MDM 001	ABCRevenue	None	B	6/20/2025 10:31:59 PM
	8649	Items	usmf	Insert	Admin	Admin	MDM MDT ...	ItemId		MDM MDT ...	6/20/2025 9:29:18 PM
	8649	Items	usmf	Update	Admin	Admin	MDM DT 01	ABCRevenue	A	B	6/20/2025 5:25:36 PM
	8649	Items	usmf	Update	Admin	Admin	MDM DT 01	ABCContri...	A	B	6/20/2025 5:25:21 PM
	8649	Items	usmf	Update	Admin	Admin	MDM DT 01	ABCContri...	None	A	6/20/2025 5:24:36 PM

Filters + Add

Record ×
begins with ▾

Item Name ×
begins with ▾

Field name ×
begins with ▾

Old value ×
begins with ▾

New value ×
begins with ▾

Created date and time ×
between ▾

Apply Reset

Master Data Change Order Form

A form used to request, track, and manage changes to key master data records such as items, customers, and vendors, ensuring data accuracy and compliance.

The screenshot displays the 'Master Data Change Order' form within the 'Finance and Operations' application. The interface includes a top navigation bar with a search bar and user profile, and a left sidebar with navigation icons. The main content area is titled 'Master Data Change Orders' and features a 'New' button. Below the title, there are tabs for 'Lines' and 'Header'. The 'Header' tab is active, showing a form with the following fields:

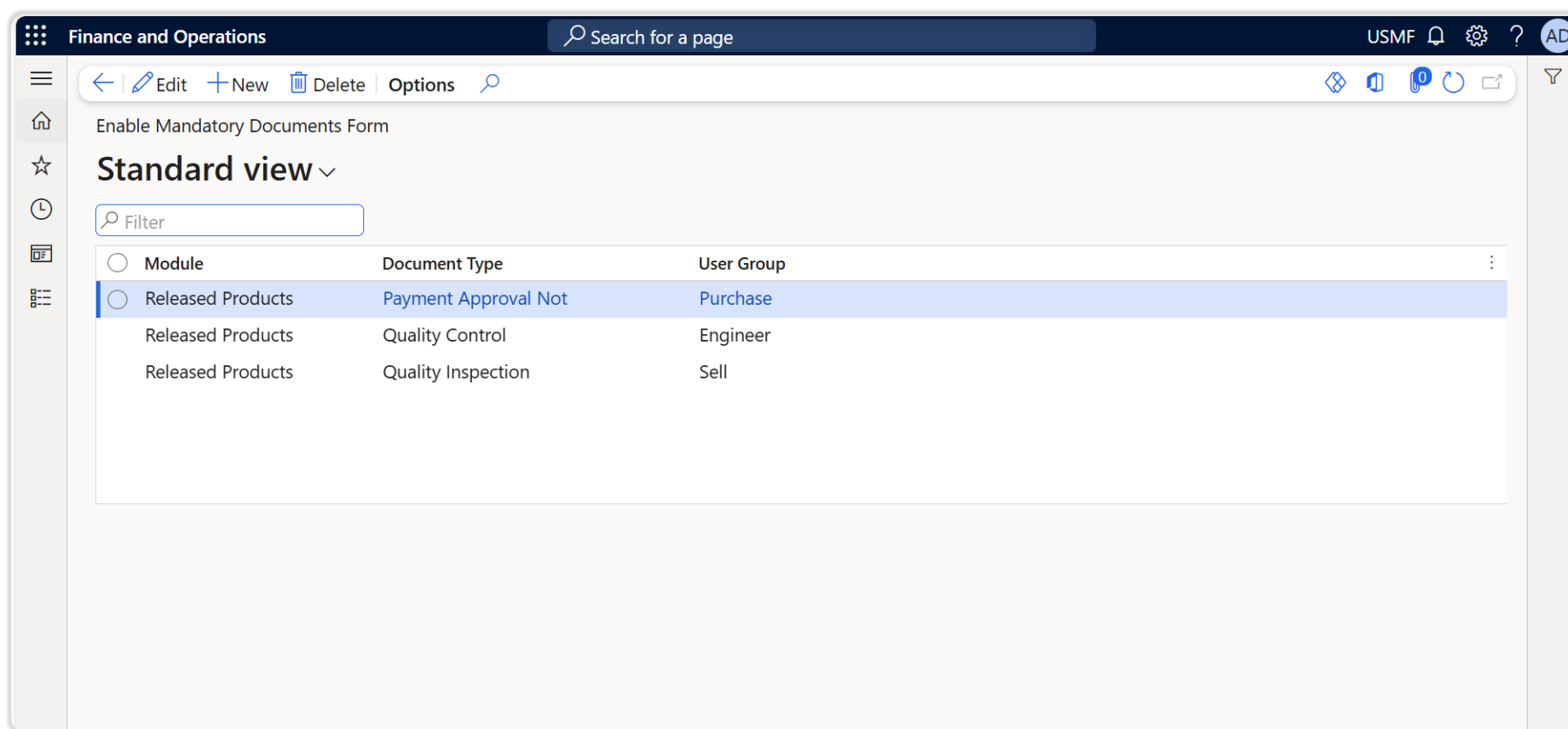
Field	Value
Change order	MDOC-000000003
Status	New
Priority	Emergency
Master Selection	Released Products
Title	BI test 01
Category	Change
Severity	High
WorkFlow Status	Draft

Below the header form, there is a section titled 'Impacted Records' with a table showing the impact of the change order on master data records.

Lin...	Master Selection	Field Selection	Old Value	New Value
1	MDM BI 01	ABCRevenue	None	A

Enable Mandatory Document Form

This form is used to define and enforce mandatory document requirements for specific user groups involved in managing key master data records such as items, customers, and vendors—ensuring process compliance and data integrity.



Query Engine

A configurable engine used to fetch, filter, and display data based on defined business logic and user-specific criteria

The screenshot displays the Microsoft Dynamics 365 Finance and Operations Query Designer interface. The top navigation bar includes the 'Finance and Operations' title, a search bar, and user information (USMF, AD). The main toolbar contains options like 'Save', 'New', 'Delete', 'Run Query', and 'Options'. The 'Options' tab is active, showing sections for 'Personalize', 'Page options', 'Edit', and 'Share'. Below this, the 'Query Designer' section is set to 'Standard view'. The 'General' section shows the query name 'Released Products', description 'Released Products', and the last run date/time '6/20/2025 08:49:30 PM'. The 'Attributes' section contains a table with two rows of conditions:

SelectCondition	Table Name	Field Name	Operator	Value
Where	EcoResProduct	ProductType	==	Item
And	InventTable	PrimaryVendorId	==	

The 'Result' section displays a table with the following data:

Item number	ABC-code margin	ABC-code revenue	ABC-code carrying ...	ABC-code value	Alternative configu...	Alternative color	Alternative size	Alternative style	Alternative version	Alternative item nu...	Auto-repo...	Batch merge date c.
1000	None	A	None	None								Manual
10003SS	None	B	None	None								Manual
11	None	B	None	None								Manual
12	None	None	None	None								Manual
14	None	None	None	None								Manual

Master Data Management Workflow Workspace

A centralized workspace to initiate, track, and manage workflow approvals for item, customer, and vendor master data changes, ensuring consistency, compliance, and data governance.

The screenshot displays the 'Master Data Management Workflow Workspace' interface within the 'Finance and Operations' application. The top navigation bar includes a search bar and user information (USMF, AD). The left sidebar shows navigation options like 'Options', 'Home', 'Star', 'Clock', and 'List'. The main content area is titled 'Master Data Management Workflow Workspace' and shows the 'Module' as 'Released Products'. Under the 'Summary' section, four blue boxes represent workflow stages: 'Draft' (1), 'Submitted' (1), 'InReview' (1), and 'Approved' (381). Below this, the 'Status' section features a list of items. The first item is 'DT MDM 0106' with a 'Draft' status. The table has columns for 'Item number', 'Name', and 'WorkFlow Status'.

Item number	Name	WorkFlow Status
DT MDM 0106	DT MDM 0106	Draft

Master Data Management Versions

Users can view the log details and the associated Master Data Change Order for a specific master record under the Master Data Management menu. This information is accessible through the 'Log Details' and 'Master Data Version' menus for individual Item, Customer, and Vendor master records.

The screenshot displays the Microsoft Dynamics 365 Finance and Operations user interface. The top navigation bar includes the 'Finance and Operations' title, a search bar, and user information (USMF, 5 notifications, settings, help, and user 'AN'). The main navigation pane on the left shows various icons for home, favorites, and recent items. The central pane features a 'Product' menu with sub-items: Languages, Set up, Product kit, Landed cost, Rebate management, and Master Data Management. The 'Master Data Management' sub-menu is highlighted with a red box, containing 'Log Details' and 'Master Data Version'. Below the navigation pane, the 'Released product details' section is visible, showing a 'Standard view' of a table with columns: Item number, Product name, Search name, Product type, Product subtype, and Product service type. The table lists several products, including 'iqoo neo 6', 'Surface Pro 128 GB', and 'Proseware 50W Car Radio'. A filter bar is present above the table, and a '# of rows Calculate' button is at the bottom left of the table area.

Item number	Product name	Search name	Product type	Product subtype	Product service type
0911	iqoo neo 6	iqooneo6	Item	Product	Not specified
1000	Surface Pro 128 GB	1001	Item	Product	Not specified
4401	Proseware 50W Car Radio	Proseware 50W Car Ra	Item	Product master	Not specified
4402	Proseware 50W Car Radio	Proseware 50W Car Ra	Item	Product master	Not specified

1. Control Your Master Data

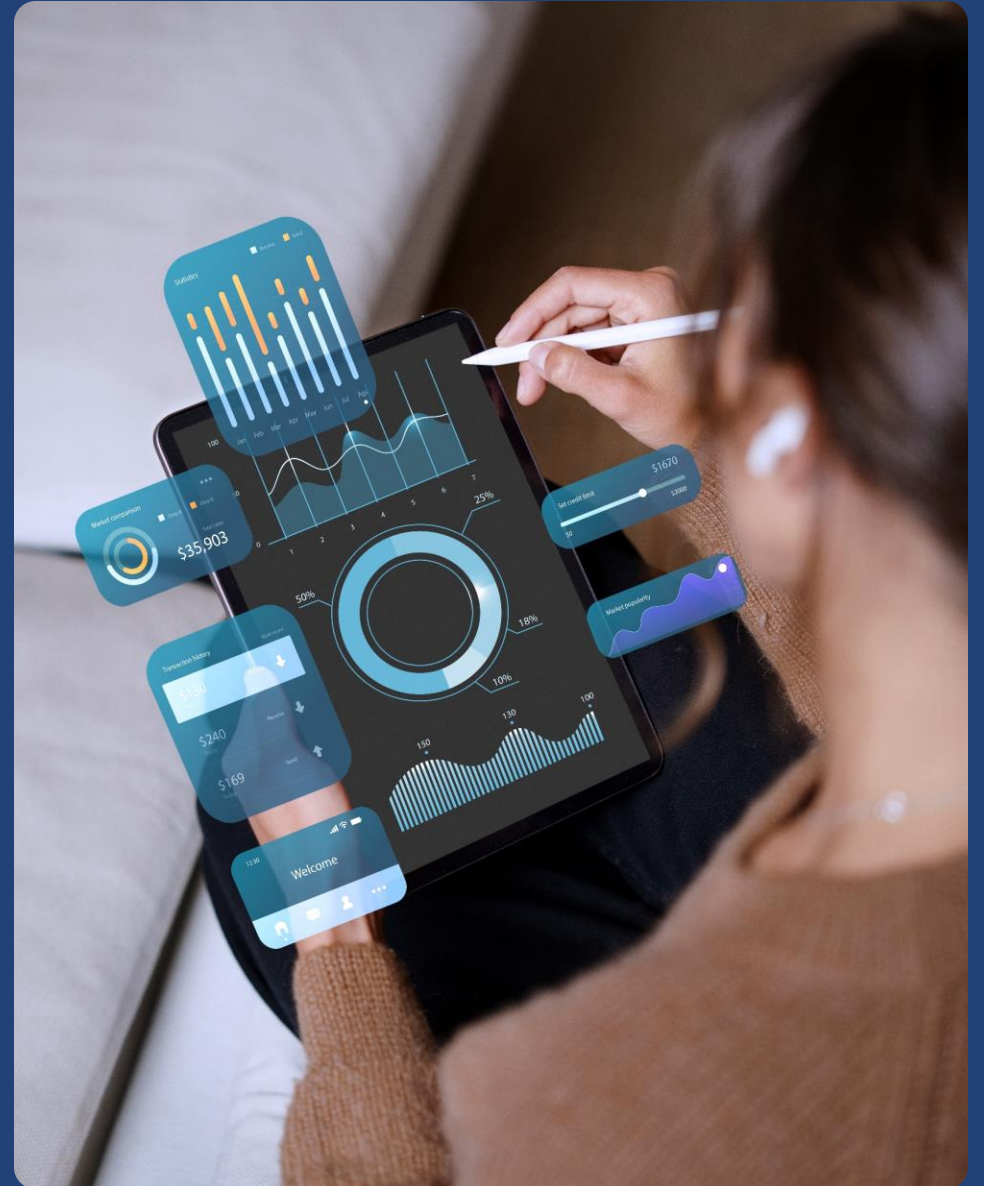
- Define Control Policy at Global master level or Company Level
- Make Important Masters as Global
- Make Important Fields Mandatory
- Set User Groups/Centralize Team who can fill in information limited to their scope
- Define Dynamic Workflow for master data approval
- Restrict records being used in business process till final approval/authorized

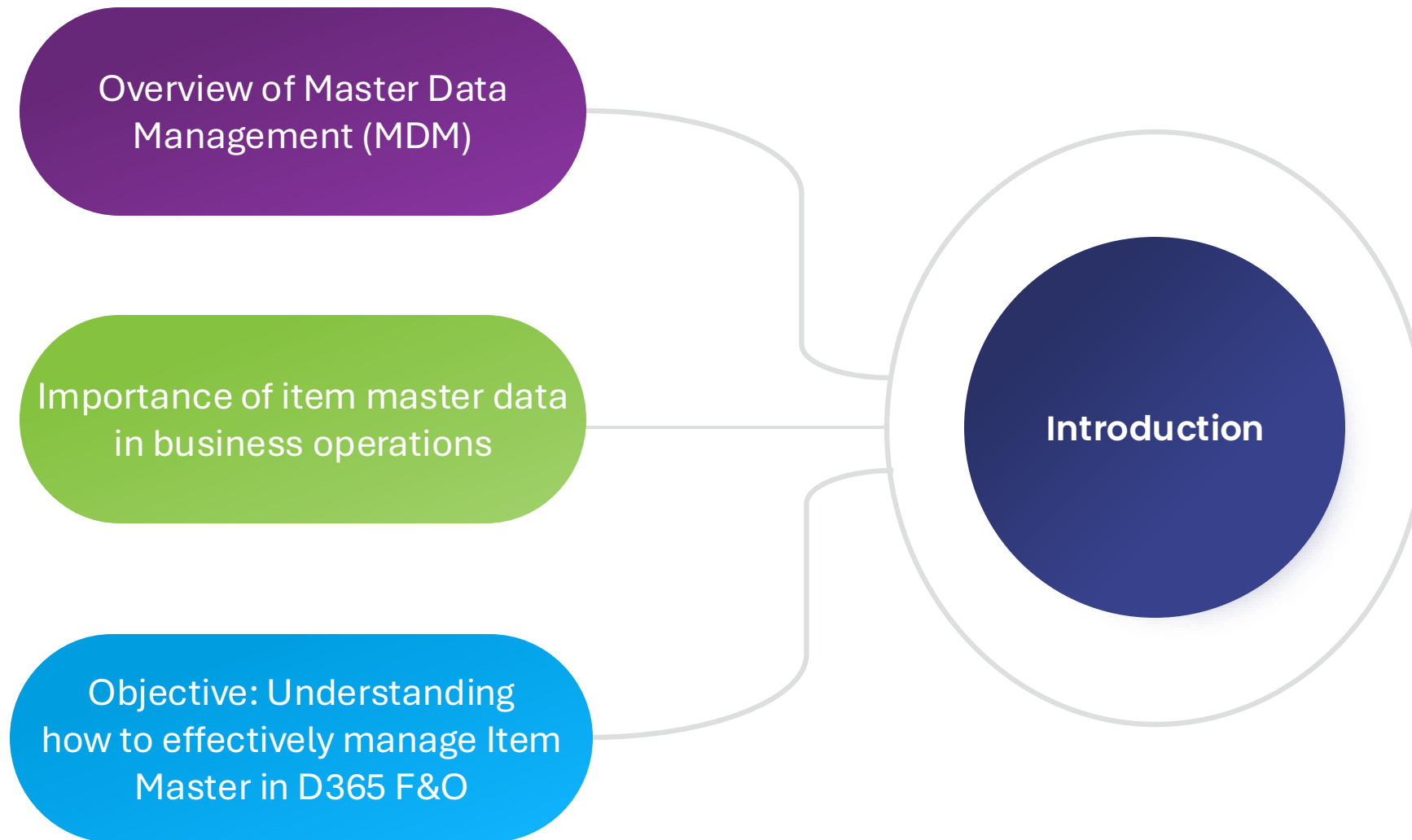
2. Change Management of Master Data

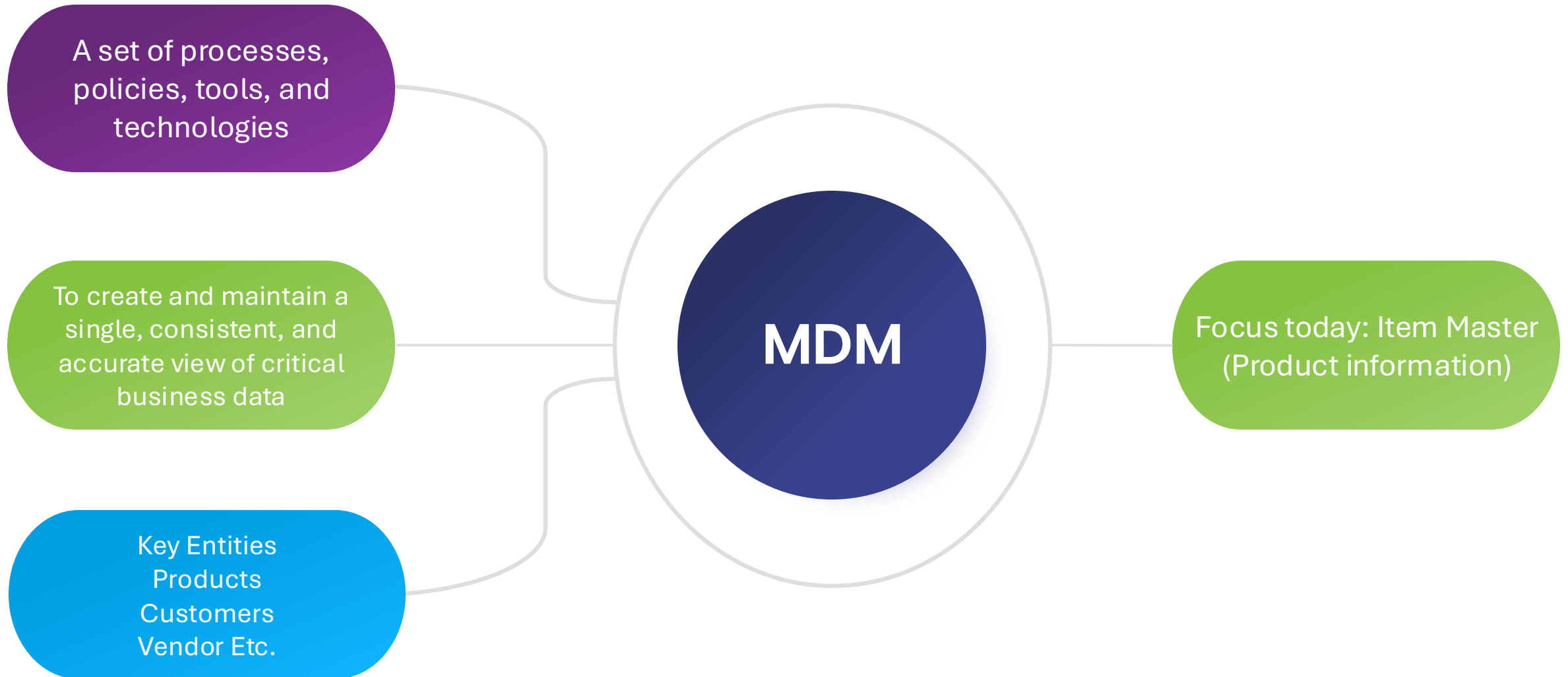
- Change request for master data
- Approval process based on change request type
- Redirect change request to specific user group
- Impact Assessment of change, Visibility on dependency (Companies, Open Transitions/Related Transactions)
- Notifications on changes

1. Easy Track and Control Who can manage master data
 - Easy view to review access of Master Data: Who has Create, Edit, View or Delete access
 - Limited rights for bulk update
 - Alers on Bulk Update of Critical data
2. Easy Audit Logs Check
 - Enable Logs Quickly
 - Keep your Audit log Handly for auditing
 - Review change quickly to answer business queries: Which master created or modified by whom and when
3. Audit Rules to check Data Health
 - Data Completeness Rules
 - Data Consistency Rules
 - Data Accuracy Rules
 - Data Lifecycle Rules
 - Referential Integrity Rules
 - Performance and Volume Rules
 - Anomaly Detection via Power BI/Fabric
 - Rule Hit Analytics

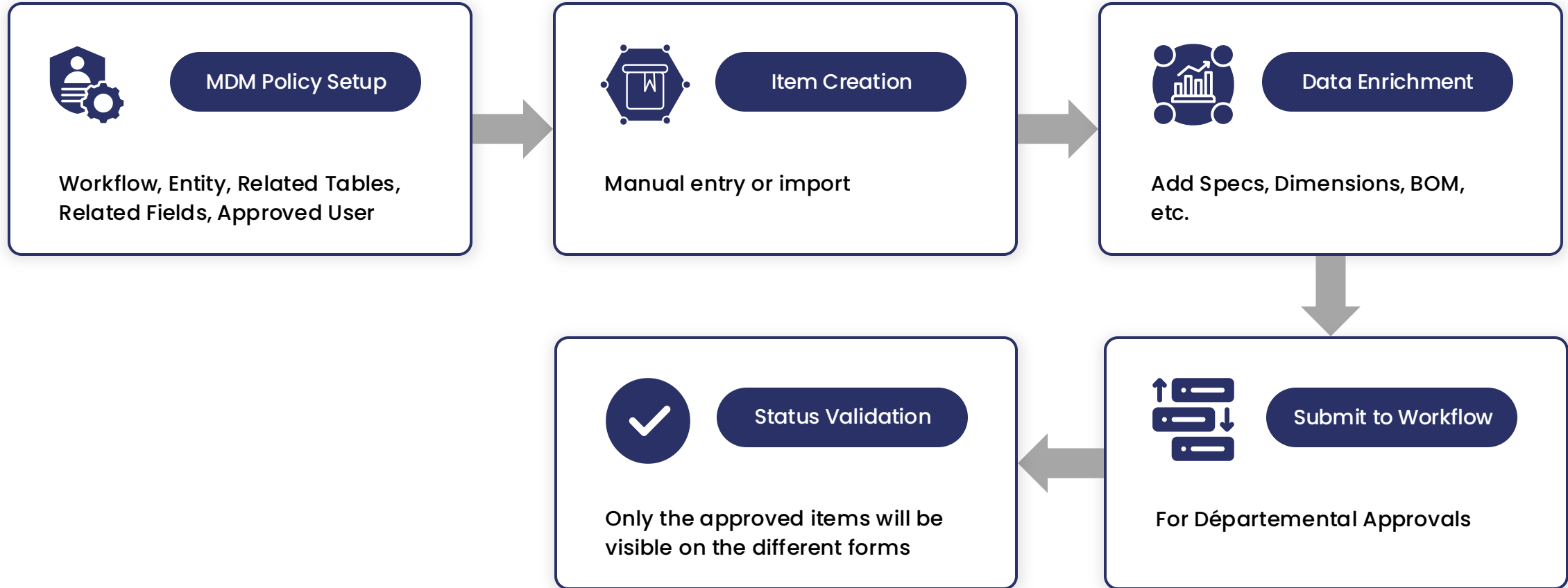
Master Data Management Item Master











- › We have a customized module where the user did a setup related to the Entity, tables, fields and workflow user groups, in short, we are activating the master data management.
- › **Entity Name** – On this form, the user will select the module where MDM needs to be activated. For now, we have selected Released products (Item Master)

The screenshot shows the 'Finance and Operations' MDM setup interface. The 'Entity Name' tab is selected and highlighted with a red box. Below it, a table shows 'Released Products' selected for both 'Name' and 'Number' columns.

	Name	Number
☐	Released Products	Released Products

- › **Related Table** – In this grid, we have the list of available tables which is related to the entity selected on the Entity name grid. The user can move the tables from the Available tables grid to the Mandatory tables Grid. Here we have mandated the three tables InventTables, Sales and Purch.

The screenshot shows the 'Finance and Operations' interface for the 'MDM' entity. The 'Related Table' tab is selected and highlighted with a red box. Below the tab, there are two columns: 'AVAILABLE TABLES' and 'MANDATORY TABLES'. The 'AVAILABLE TABLES' column lists several tables, including 'Invent', 'InventItemLocation', 'EcoResStorageDi...', 'EcoResTrackingDi...', 'InventItemGroupI...', 'InventModelGrou...', 'EcoResProduct', and 'EcoResProduct_Ec...'. The 'MANDATORY TABLES' column lists 'InventTable', 'Sales', and 'Purch', with 'Purch' selected and highlighted in blue. A red box highlights the 'Related Table' tab, and a blue box highlights the 'Purch' table in the 'MANDATORY TABLES' column.

Finance and Operations

Search for a page

USMF

Standard view

MDM

Entity Name **Related Table** Related Fields Related User Groups

AVAILABLE TABLES

- Invent
- InventItemLocation
- EcoResStorageDi...
- EcoResTrackingDi...
- InventItemGroupI...
- InventModelGrou...
- EcoResProduct
- EcoResProduct_Ec...

MANDATORY TABLES

- InventTable
- Sales
- ☒ Purch

- › **Related Fields** – In this grid, we have the list of available fields which is related to the table selected on the “Related Table-Mandatory Tables”. The user can move the fields from the Available fields grid to the Mandatory fields Grid. Also, we have mandated the fields for of table Sales and InvenTable.

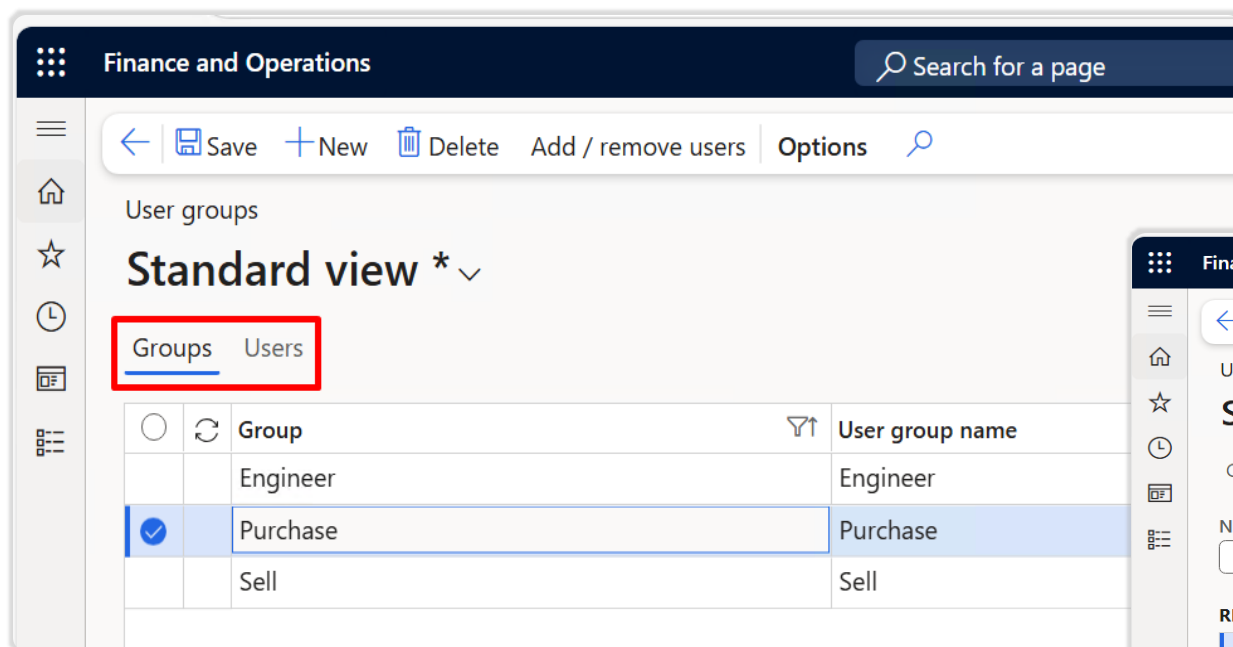
The screenshot displays the 'Related Fields' configuration page within the 'Finance and Operations' application. The page title is 'MDM'. Below the title, there are four tabs: 'Entity Name', 'Related Table', 'Related Fields' (which is selected and highlighted with a red rectangle), and 'Related User Groups'. The 'Related Fields' tab is divided into two main sections: 'AVAILABLE FIELDS' and 'MANDATORY FIELDS'. The 'AVAILABLE FIELDS' section contains a list of fields: 'AllocateMarkup', 'EndDisc', 'InterCompanyBlo...', 'ItemId', 'LineDisc', 'Markup', 'MarkupGroupId', and 'MarkupSecCur_RU'. The 'MANDATORY FIELDS' section contains a single field, 'UnitId', which is marked as mandatory with a blue checkmark icon. Navigation buttons (Save, New, Delete, Options) are located at the top left of the page, and a search bar is at the top right. The left sidebar shows the application navigation menu.

- › **Related User Group** – In this grid, we have the list of available user groups. The user can move the groups from the Available user group grid to the Mandatory user group grid, This mandatory user group is linked with the field which was selected on the form “Related fields” Mandatory fields grid.
- › **For example**, the user has selected a field “Unit ID” on the form “Related fields” under the Mandatory fields grid, and on the form Related user group, the user has moved the group Purchase from Available to Mandatory grid; in this way, the user has mandated the “Unit Id” field need to check buy Purchase group user.

The screenshot shows the 'Related Fields' tab of the 'MDM' form. The 'AVAILABLE FIELDS' list on the left includes: AllocateMarkup, EndDisc, InterCompanyBlo..., ItemId, LineDisc, Markup, MarkupGroupId, and MarkupSecCur_RU. The 'MANDATORY FIELDS' list on the right has 'UnitId' selected with a blue checkmark. Red boxes highlight the 'Related Fields' tab and the 'MANDATORY FIELDS' list.

The screenshot shows the 'Related User Groups' tab of the 'MDM' form. The 'AVAILABLE USER GROUPS' list on the left includes: Approvers, CrLimitAdj, Engineer, Originator, OverBudget, and Sell. The 'MANDATORY USER GROUPS' list on the right has 'Purchase' selected with a blue checkmark. Red boxes highlight the 'Related User Groups' tab and the 'MANDATORY USER GROUPS' list.

- › **User Group** – It's a standard form where we will create a User group and add the user to the created group. For example, we have created a Group "Purchase", and in this group, the user Saurabh Is added.



Finance and Operations

Search for a page

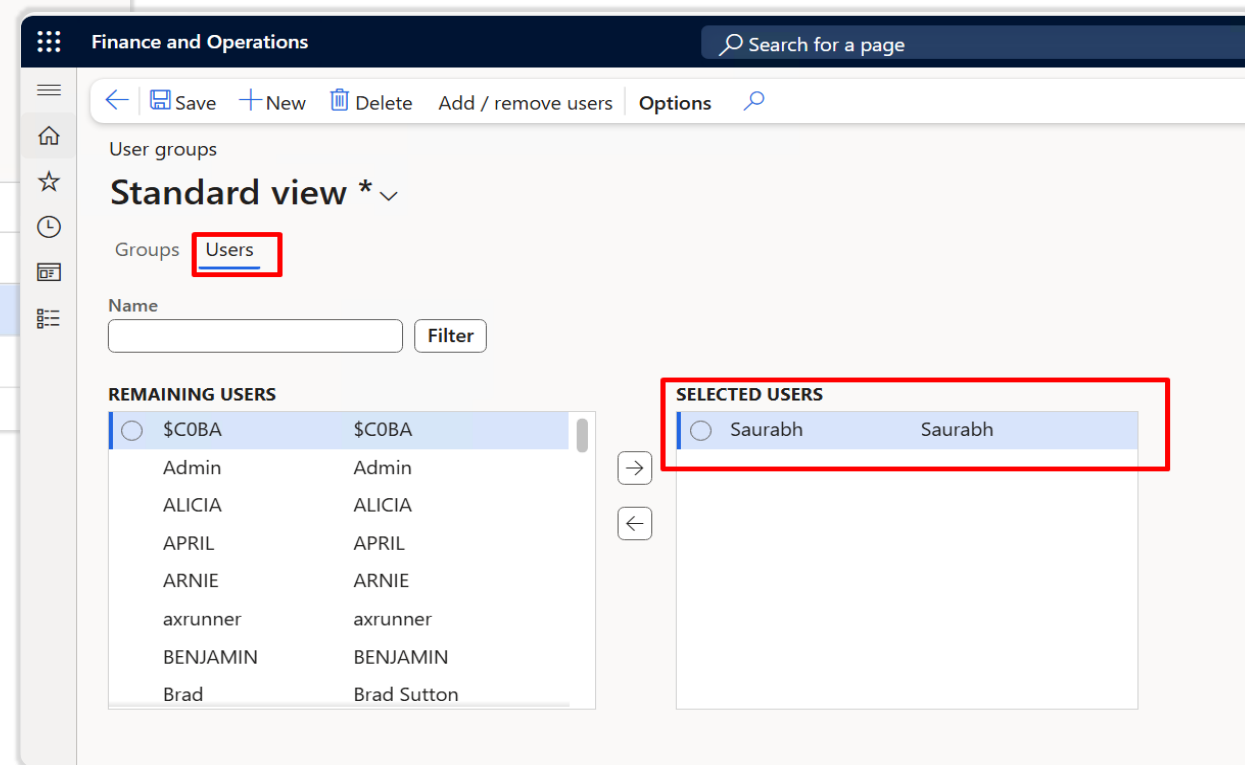
Save New Delete Add / remove users Options

User groups

Standard view * ▾

Groups Users

	Group	User group name
	Engineer	Engineer
☒	Purchase	Purchase
	Sell	Sell



Finance and Operations

Search for a page

Save New Delete Add / remove users Options

User groups

Standard view * ▾

Groups Users

Name Filter

REMAINING USERS

☒	\$COBA	\$COBA
	Admin	Admin
	ALICIA	ALICIA
	APRIL	APRIL
	ARNIE	ARNIE
	axrunner	axrunner
	BENJAMIN	BENJAMIN
	Brad	Brad Sutton

→

←

SELECTED USERS

☒	Saurabh	Saurabh
-------------------------------------	---------	---------

› Let's take an example: the user has created an Item and provided basic details.

Finance and Operations

Search for a page

USMF

Workflow

Product Purchase Sell Manage inventory Engineer Plan Manage projects Manage costs Commerce General Setup Options

Maintain New Product master Languages Set up Product kit Rebate management

Apply template Product Template Released product variants Translations Dimension groups Reservation hierarchy Counting reason code policy Product attributes Related products Configure Kit configurations Rebate management groups

Released product details

Standard view

DT MDM 0104 : DT MDM 0104

General

DT MDM 0104

IDENTIFICATION

Product type
Item

Product subtype
Product

Product service type
Not specified

Item number
DT MDM 0104

Product number
DT MDM 0104

FURTHER IDENTIFICATION

Product name
DT MDM 0104

Search name
DTMDM0104

Description

ADMINISTRATION

Storage dimension group
SiteWH

Tracking dimension group
Batch-Phy

Item model group
FIFO

Reservation hierarchy

Counting reason code policy

Product lifecycle state

Advanced notes group

Purchase

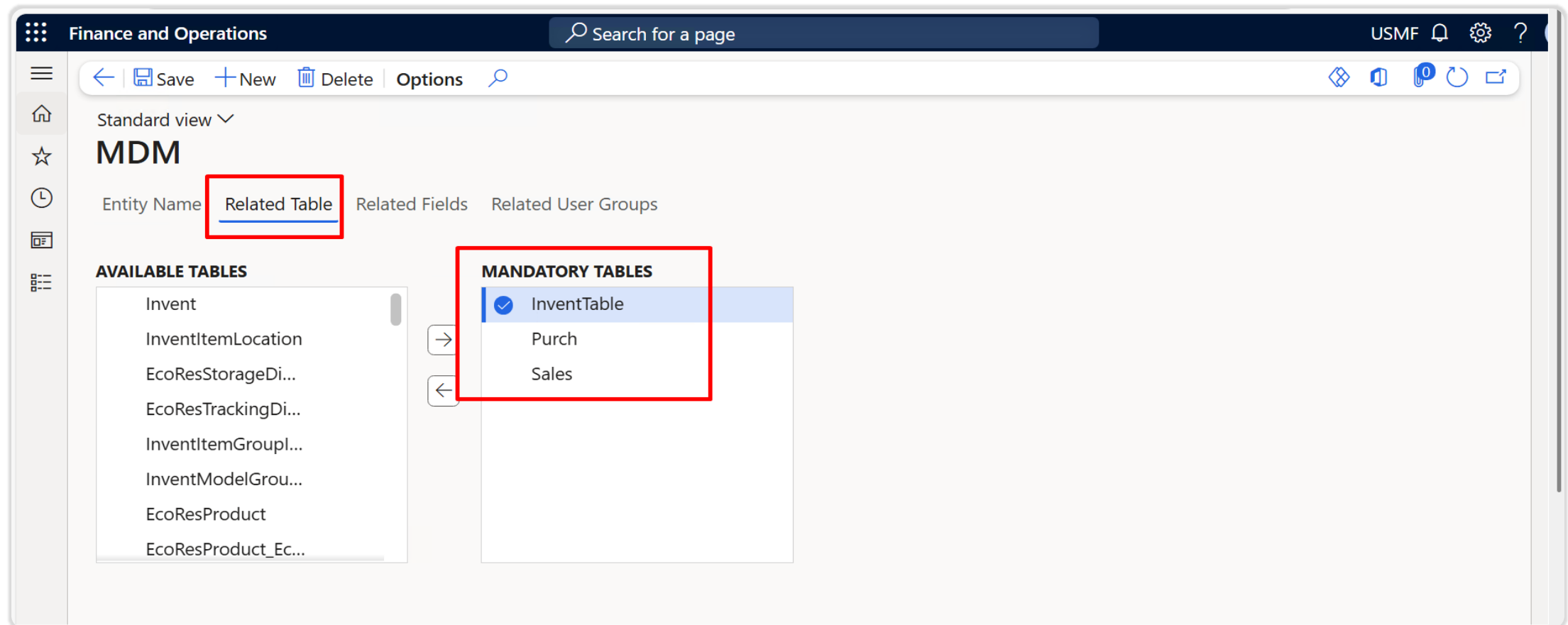
ea -- 0.00

PURCHASE ORDER	ADMINISTRATION	PRICE UPDATE	CHARGES	DISCOUNTS	Pricing precision
Unit	Buyer group	Latest purchase price	Price charges	Line discount group	

- › As the MDM is activated for the item master, the user needs to submit the item to a workflow, and it is assigned to the required person as per the MDM policy.

The screenshot displays the Dynamics 365 Finance and Operations user interface. At the top, the 'Workflow' button in the navigation bar is highlighted with a red rectangle. Below the navigation bar, the 'Product master' section is active, showing various product management options. The main content area displays 'Released product details' for 'DT MDM 0104 : DT MDM 0104' in 'Standard view'. The 'General' tab is selected, showing fields for 'IDENTIFICATION' (Product type: Item, Product subtype: Product, Product service type: Not specified), 'Item number' (DT MDM 0104), 'Product number' (DT MDM 0104), 'Search name' (DTMDM0104), 'Description', 'ADMINISTRATION' (Storage dimension group: SiteWH, Tracking dimension group: Batch-Phy, Item model group: FIFO), 'Reservation hierarchy', 'Counting reason code policy', 'Product lifecycle state', and 'Advanced notes group'. The 'Purchase' section at the bottom shows fields for 'PURCHASE ORDER' (Unit), 'ADMINISTRATION' (Buyer group), 'PRICE UPDATE' (Latest purchase price), 'CHARGES' (Price charges), 'DISCOUNTS' (Line discount group), and 'Pricing precision' (0.00).

- › On the MDM policy setup, let's mandate the fields "Unit" of Purchase and Sell, and the BOM unit ID on the Engineer tab, for that on the "Related Table" form, first need to move the tables from Available to Mandatory Tables where this field is available. (Invent Table For Engineer tab BOM Unit field, Purch table for Purchase tab Unit field, Sales table for Sell tab Unit Field),



- › Now select any of the tables on the form related table under the Mandatory tables grid. Here we have selected a table, Invent Table, now click on the related fields form and move the field BOM Unit ID from Available to the Mandatory fields grid, in this way the user can make the field mandatory for the fields of different tables.

The screenshot shows the 'MDM' configuration page with the 'Related Table' tab selected. The 'AVAILABLE TABLES' list on the left includes 'Invent', 'InventItemLocation', 'EcoResStorageDi...', 'EcoResTrackingDi...', 'InventItemGroupI...', 'InventModelGrou...', 'EcoResProduct', and 'EcoResProduct_Ec...'. The 'MANDATORY TABLES' list on the right includes 'InventTable' (which is selected with a blue checkmark), 'Purch', and 'Sales'. Navigation arrows are present between the two lists.

The screenshot shows the 'MDM' configuration page with the 'Related Fields' tab selected. The 'AVAILABLE FIELDS' list on the left includes 'ItemId', 'ABCContribution...', 'ABCRevenue', 'ABCTieUp', 'ABCValue', 'AlcoholManufact...', 'AlcoholProductio...', and 'AlcoholStrength_...'. The 'MANDATORY FIELDS' list on the right includes 'BOMUnitId' (which is selected with a blue checkmark). Navigation arrows are present between the two lists.

- › Same way, now select a Purch table, on the form related table under the Mandatory tables grid, now click on the related fields form and move the field Unit ID from Available to the Mandatory fields grid,

Finance and Operations

Search for a page

Standard view ▾

MDM

Entity Name **Related Table** Related Fields Related User Groups

AVAILABLE TABLES

- Invent
- InventItemLocation
- EcoResStorageDi...
- EcoResTrackingDi...
- InventItemGroupI...
- InventModelGrou...
- EcoResProduct
- EcoResProduct_Ec...

MANDATORY TABLES

- InventTable
- ☒ Purch
- Sales

Finance and Operations

Search for a page

Standard view ▾

MDM

Entity Name Related Table **Related Fields** Related User Groups

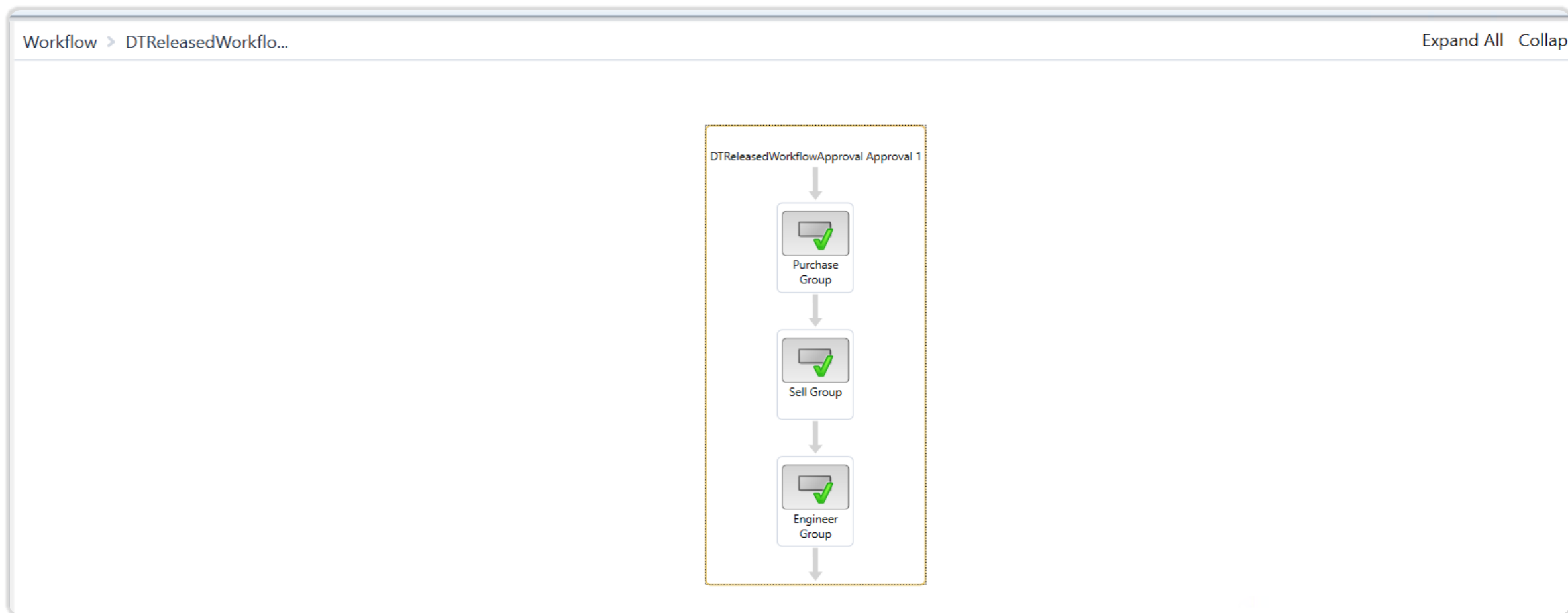
AVAILABLE FIELDS

- AllocateMarkup
- EndDisc
- InterCompanyBlo...
- ItemId
- LineDisc
- Markup
- MarkupGroupId
- MarkupSecCur_RU

MANDATORY FIELDS

- ☒ UnitId

- › As we mandate the fields “Unit” of Purchase and Sell, and the BOM unit on the Engineer, the workflow has been set up as if the values in these fields are blank, the assigned user will not be able to approve the workflow, and the system will notify the user, as per the hierarchy the first approval goes to the Purchase group as soon as the Purchase group approved the workflow it will assign to next group, also the approval of all the user group is mandatory.



- › As we have mandated the fields, and if it's blank, and the user tries to approve the workflow, the error notification will notify to user.

The screenshot displays the SAP Finance and Operations (F&O) interface. The top navigation bar includes the 'Finance and Operations' title, a search bar, and user information (USMF, AD). The main navigation menu on the left lists various functional areas: Maintain, Readiness checks, New, Product master, Languages, and Action center. The 'Product' tab is selected, showing a list of product-related actions. The 'Action center' panel on the right displays a notification: 'Please enter a value for the Mandatory field UnitId , Less than a minute ago'. The main content area shows the 'Released product details' for 'DT MDM : DT MDM 0105'. The 'General' section contains fields for Identification (Product type, Item, Product subtype, Product service type, Item number) and Further Identification (Product name, Product number, Search name, Description, Tracking dimension group, Item model group, Reservation hierarchy, Counting reason code policy, Product lifecycle state). The 'ADMINISTRATION' section includes the Storage dimension group (SiteWH).

Finance and Operations Search for a page USMF AD

Maintain **Readiness checks** **New** **Product master** **Languages** **Action center**

Apply template
Validate
Release product structure

Readiness checks
Products not passed readiness checks
All products

Engineering product
Product
Template

Released product variants
Product dimensions

Translations
Dimension
Reservation
Counting r

1 total [See all](#)

Please enter a value for the Mandatory field UnitId ,
Less than a minute ago

[Clear all](#)

[Released product details](#) | Standard view

DT MDM : DT MDM 0105

General

IDENTIFICATION

Product type
Item
Product subtype
Product
Product service type
Not specified
Item number
DT MDM

Product number
DT MDM 0105

Engineering product category de...

Product owner

FURTHER IDENTIFICATION

Product name
DT MDM 0105

ADMINISTRATION

Storage dimension group
SiteWH

Tracking dimension group
Batch-Phy

Item model group
FIFO

Reservation hierarchy

Counting reason code poli

Product lifecycle state

Purchase

- › To enable the mandatory document 'Quality Inspection' for the 'Release Products' module and the 'Purchase' user group, open the 'Enable Mandatory Documents' form. Create a new line, then select 'Release Products' in the Module field, choose 'Quality Inspection' as the Document Type, and select 'Purchase' in the User Group field.

The screenshot shows the 'Enable Mandatory Documents Form' in the Dynamics 365 Finance and Operations interface. The form is titled 'Enable Mandatory Documents Form' and is in 'Standard view'. A search bar is present above the table. The table has four columns: 'Module', 'Document Type', and 'User Group'. A single line is added to the table with the following values:

	Module	Document Type	User Group
☒	Released Products	Quality Inspection	Purchase

- › Since mandatory documents have been enforced, if any required document is missing when the user attempts to approve the workflow, an error notification will be displayed to alert the user.

The screenshot displays the Dynamics 365 Finance and Operations user interface. The top navigation bar includes the 'Finance and Operations' title, a search bar, and user information (USMF, AD). The left sidebar contains navigation icons. The main content area is titled 'Released product details' and shows the 'Standard view' for product 'DT MDM : DT MDM 0105'. The interface is divided into several sections: 'Maintain' (Apply template, Validate, Release product structure), 'Readiness checks' (Readiness checks, Products not passed readiness checks, All products), 'New' (Engineering product, Product, Template), and 'Product master' (Released product variants, Product dimensions). The 'PHYSICAL DIMENSIONS' section includes input fields for Gross depth, Gross width, Gross height, and Volume, all set to 0.00. The 'SHIPPING AND RECEIVING' section includes input fields for Counting group, Unit (set to 'ea'), Arrival handling time (set to '00:00'), Sort code (set to '0'), and Potency. The 'ITEM DATA' section includes input fields for Packing quantity (set to 0.00), Shelf advice period in days, Shelf life period in days, Best before period in days, and Batch merge date calculation. An 'Action center' on the right side of the screen displays a notification: 'Mandatory document of type Quality Inspection is not attached' with a red 'X' icon and a 'See all' link. Below the notification is a 'Clear all' link.

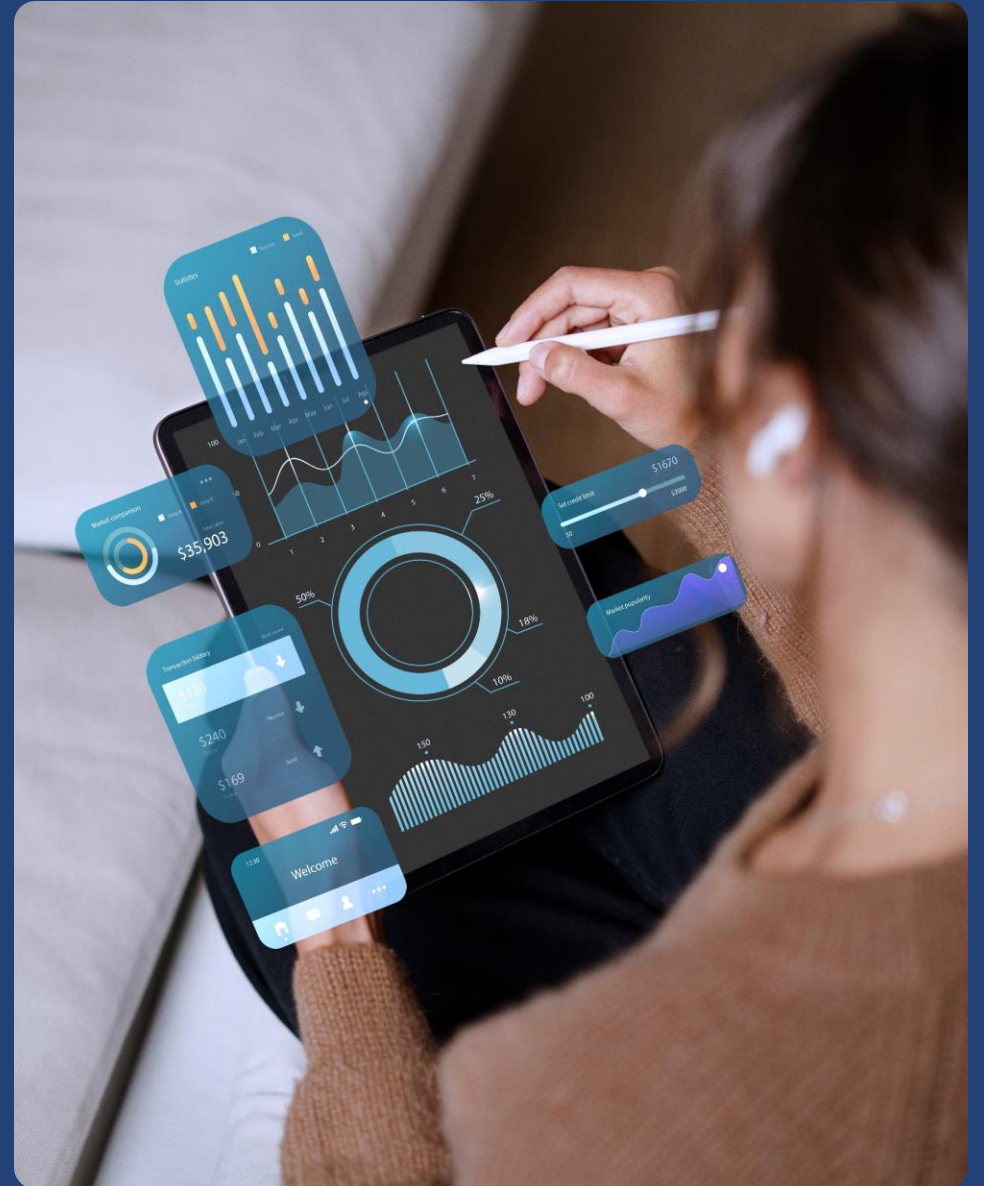
- › If the workflow status is in Draft or in-review, the item will not be visible in the different forms. It will be visible as soon as all the assigned users have approved the workflow.

The screenshot displays the 'Finance and Operations' application interface. The top navigation bar includes a search bar and user information (USMF). The main menu on the left shows various icons for navigation. The central area is titled 'Released product details | Standard view *'. Below this, there is a table with columns for Item number, Product name, Search name, WorkFlowStatus, Product type, Product subtype, and a final column with a dropdown arrow. The first row of data shows 'DT MDM 0104' for the item number and product name, 'DTMDM0104' for the search name, 'InReview' for the WorkFlowStatus (highlighted with a red box), 'Item' for the product type, and 'Product' for the product subtype. The final column contains the text 'Not'.

Item number	Product name	Search name	WorkFlowStatus	Product type	Product subtype	F :
DT MDM 0104	DT MDM 0104	DTMDM0104	InReview	Item	Product	Not

Form List	
Purchase requisition	Inventory adjustment number
Purchase order	Inventory counting journal
Category hierarchy	Inventory Transfer journal
Trade agreement journal	Inventory BOM Journal
Purchase agreement	Batches
Price tolerances	Serial numbers
Vendor rebate agreement	Picking list
Supplementary Items	Inventory ownership change Journal
Sales order	Bills of materials
Sales agreement	Route version
Customer rebate agreement	Operation relation
Inventory movement journal	Production BOM

Master Data Management Query Engine



Query Designer Master

- › To configure a Query Designer, certain prerequisite setups are required. Begin by setting up the Query Designer Master—select the appropriate module, provide a correct form name, and then click 'Load Metadata'. This metadata loading is a one-time process. In our case, since the setup is for the Release Products module, select the module accordingly and enter 'ReleasedProducts' as the name."

The screenshot displays the 'Query Designer Master' window within the 'Finance and Operations' application. The top navigation bar includes a search bar and user profile. The main area shows a 'Standard view' of a table. The table has two columns: 'Type' and 'Name'. The row 'Released Products' is selected, and its name 'ReleasedProducts' is entered in the 'Name' field. A red rectangle highlights the selection area.

Type	Name
Released Products	ReleasedProducts

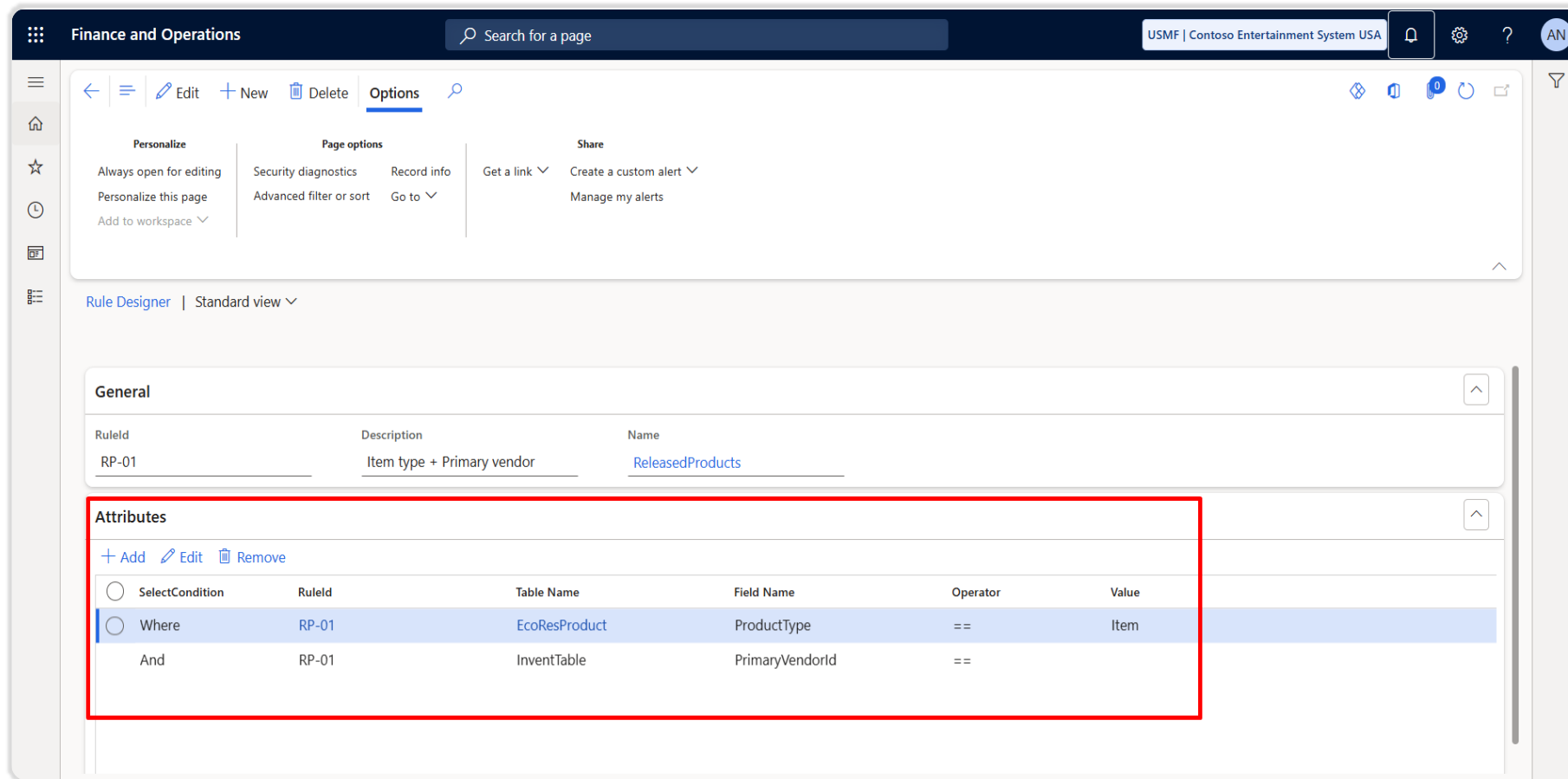
Rule Designer

- › Next, in the Rule Designer form, users can define predefined rules that will be applied to the Query Designer form. In this example, we are setting up a rule for Released Products with the condition: Item Type = 'Item' AND Primary Vendor = NULL. To create this, add a new rule, enter values for 'Rule ID' and 'Description' in the General tab, and select the appropriate module from the 'Name' dropdown. Since this rule is for Released Products, that module should be selected.

The screenshot shows the 'Rule Designer' interface within the 'Finance and Operations' application. The top navigation bar includes a search bar and user information. The left sidebar contains navigation icons. The main content area is divided into two tabs: 'General' and 'Attributes'. The 'General' tab is currently selected and contains three input fields: 'Ruleid' (with the value 'RP-01'), 'Description' (with the value 'Item type=Item AND Primary ve...'), and 'Name' (a dropdown menu showing 'Released Products'). The 'Attributes' tab is below it and is currently empty, displaying a message: 'We didn't find anything to show here.'

Rule Designer

- › Now, add a new line in the Attributes section by clicking the 'Add' button. Enter the required details in the fields: Table Name, Field Name, Operator, and Value. Since we are configuring the rule 'Item Type = Item AND Primary Vendor = NULL', two lines need to be created—one for 'Item Type = Item' and another for 'Primary Vendor = NULL', and click on save.

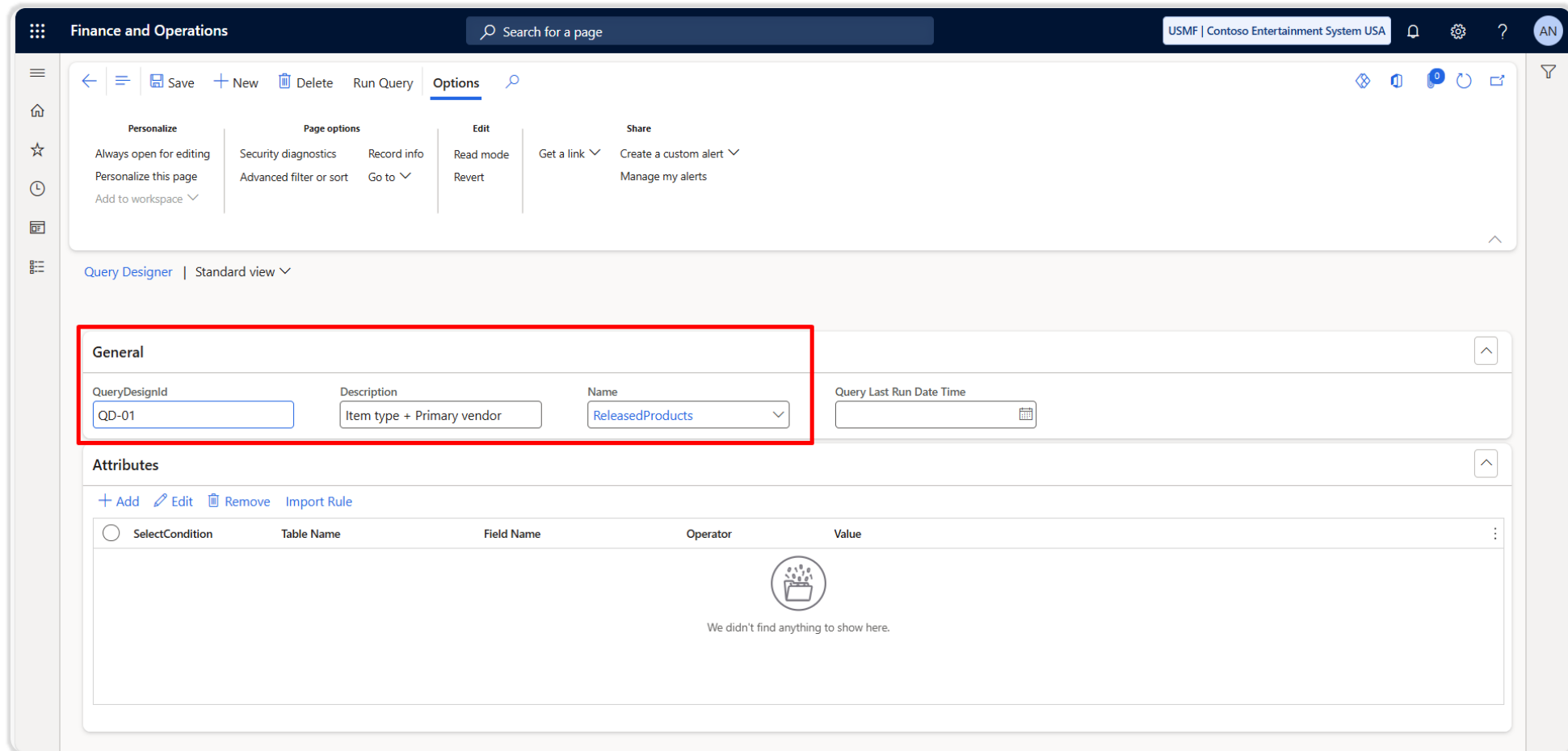


The screenshot shows the 'Rule Designer' interface in Dynamics 365. The 'Attributes' section is highlighted with a red box. It contains a table with the following data:

	RuleId	Table Name	Field Name	Operator	Value
☐ SelectCondition					
☒ Where	RP-01	EcoResProduct	ProductType	==	Item
☐ And	RP-01	InventTable	PrimaryVendorId	==	

Query Designer

- › On the Query Designer form, users can either execute predefined rules or define and run their own custom rules. To do this, start by creating a new Query Designer entry—in the general tab, fill in the 'Query Design ID' and 'Description' fields, and select the appropriate master from the 'Name' dropdown. In our case, the master will be 'ReleasedProducts'.



The screenshot shows the 'Query Designer' form in the 'Finance and Operations' application. The 'General' tab is selected, and the 'QueryDesignId' field is highlighted with a red box. The 'Name' dropdown is set to 'ReleasedProducts'.

QueryDesignId	Description	Name	Query Last Run Date Time
QD-01	Item type + Primary vendor	ReleasedProducts	

The 'Attributes' section is empty, displaying a message: 'We didn't find anything to show here.'

Query Designer

- › In the Attributes tab, users can either import predefined rules or define custom ones. To import a rule created in the Rule Designer, click on 'Import Rule'. This will open the 'Import Rule' window—select the desired rule from the dropdown list and click 'OK' to proceed.

The screenshot displays the 'Query Designer' interface for 'Finance and Operations'. The 'Attributes' tab is active, showing a table with columns: SelectCondition, Table Name, Field Name, and Operation. The 'Import Rule' button is highlighted with a red box. The 'Import Rule' window is open, showing a dropdown menu for 'Rule' with 'RP-01' selected. Below the dropdown is a table with columns 'RuleId' and 'Description'. The table contains one row: 'RP-01' with the description 'Item type + Primary vendor'. The 'Import Rule' window also has 'OK' and 'Cancel' buttons at the bottom right.

Query Designer Interface:

- Page Header:** Finance and Operations, Search for a page
- Navigation:** Back, Save, New, Delete, Run Query, Options
- Personalize:** Always open for editing, Personalize this page, Add to workspace
- Page options:** Security diagnostics, Advanced filter or sort, Go to
- Edit:** Read mode, Revert
- Share:** Get a link, Create a custom alert, Manage my alerts
- Query Designer:** Standard view
- General:** QueryDesignId: QD-01, Description: Item type + Primary vendor, Name: ReleasedProducts
- Attributes:** + Add, Edit, Remove, **Import Rule**

Import Rule Window:

- Parameters:** Rule: RP-01
- Table:**

RuleId	Description
RP-01	Item type + Primary vendor

- Buttons:** OK, Cancel

Query Designer

- › Once the user clicks 'OK', the rule is imported into the Attributes tab. Then, click 'Run Query' to execute the rule and load the results in the Result tab.

The screenshot shows the 'Query Designer' interface in Dynamics 365. The top navigation bar includes 'Finance and Operations', a search bar, and user information 'USMF | Contoso Entertainment System USA'. The main toolbar has buttons for 'Save', 'New', 'Delete', 'Run Query' (highlighted with a red box), and 'Options'. Below the toolbar are sections for 'Personalize', 'Page options', 'Edit', and 'Share'. The 'Query Designer' section is set to 'Standard view'. The 'General' tab shows fields for 'QueryDesignId' (QD-01), 'Description' (Item type + Primary vendor), 'Name' (ReleasedProducts), and 'Query Last Run Date Time' (6/23/2025 11:03:07 AM). The 'Attributes' tab is active, displaying a table with two rows of conditions. The first row is highlighted with a blue background and a red border.

	SelectCondition	Table Name	Field Name	Operator	Value
☒	Where	EcoResProduct	ProductType	==	Item
☐	And	InventTable	PrimaryVendorId	==	

Query Designer

- Once the query is executed, the data is populated in the Result tab. The 'Query Last Run Date Time' field in the General tab will also be updated if the user runs the query again using the same Query Rule ID.

The screenshot displays the Query Designer interface in Dynamics 365 Finance and Operations. The top navigation bar shows 'Finance and Operations' and a search bar. The main area is divided into several sections:

- Personalize:** Includes options like 'Always open for editing', 'Personalize this page', and 'Add to workspace'.
- Page options:** Includes 'Security diagnostics', 'Record info', 'Advanced filter or sort', and 'Go to'.
- Edit:** Includes 'Read mode' and 'Revert'.
- Share:** Includes 'Get a link' and 'Create a custom alert'.

The 'General' tab is selected, showing the following fields:

- QueryDesignId:** QD-01
- Description:** Item type + Primary vendor
- Name:** ReleasedProducts
- Query Last Run Date Time:** 6/23/2025 11:03:07 AM

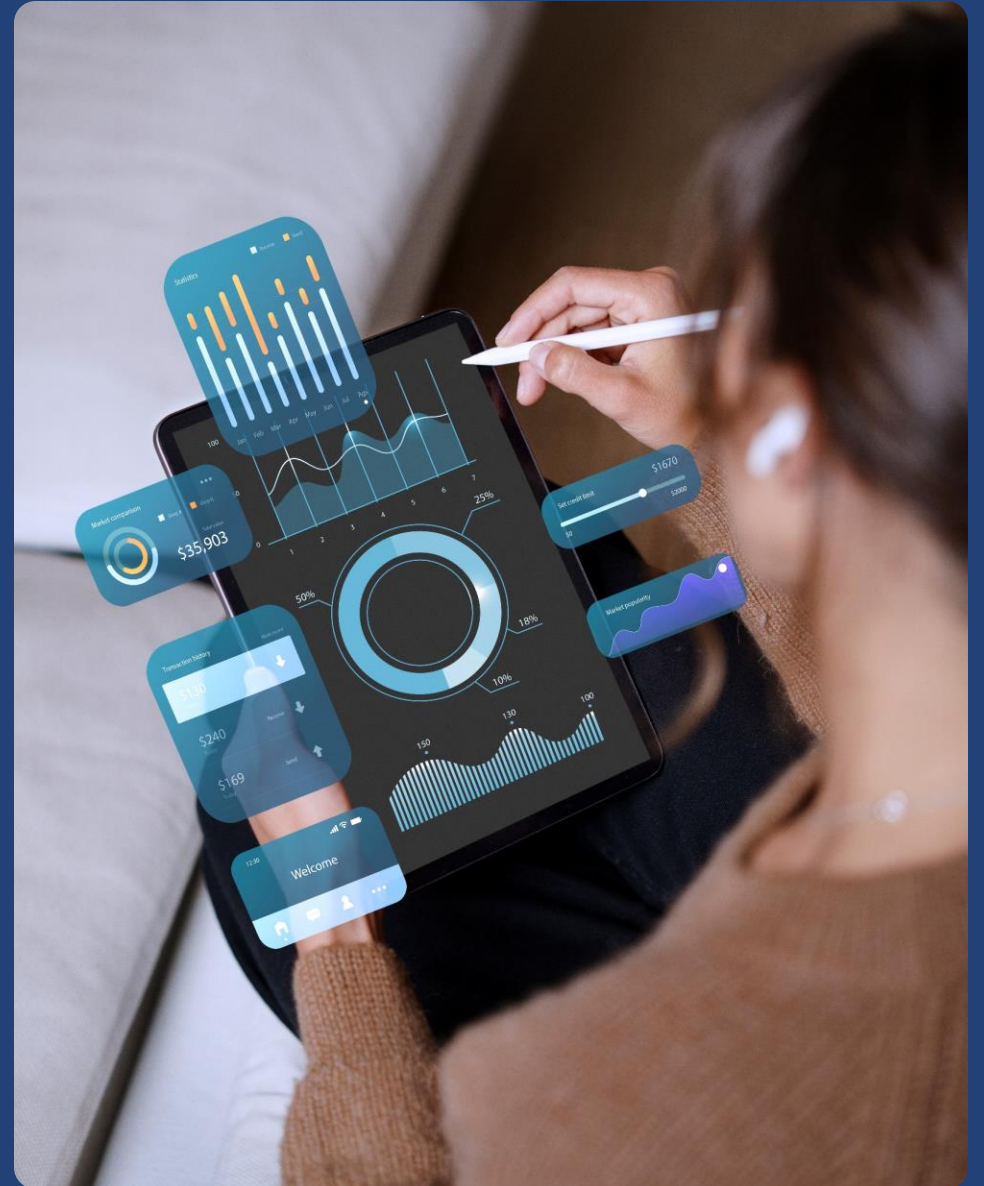
The 'Result' tab is also visible, showing a table of data. The table has the following columns:

Item number	ABC-code margin	ABC-code revenue	ABC-code carrying cost	ABC-code value	Alternative configuration	Alternative color	Alternative size	Alternative style	Alternative item number	Auto-report as
1000	None	None	None	None						
4401	None	None	None	None						
4402	None	None	None	None						
4403	None	None	None	None						
A0001	None	None	None	None						

List of Rules		
Item master	Item type + Overdelivery + Underdelivery (Purchase & Sales)	Item type = Item AND Overdelivery = NULL AND Underdelivery = NULL
Item master	Item type + Cost group	Item type = Item AND Cost group = NULL
Item master	Item type + Calculation group	Item type = Item AND Calculation group = NULL
Item master	Item type + Primary vendor	Item type = Item AND Primary vendor = NULL
Item master	Direct delivery flag + Direct delivery warehouse	Direct delivery = Yes AND Direct delivery warehouse = NULL
Vendor master	Mode of delivery	Mode of delivery IS NULL
Vendor master	Method of payment + Vendor group	Method of payment IS NULL
Vendor master	Vendor status	Vendor status = On hold
Vendor master	Term of payment	Term of payment = NULL
Vendor master	Financial dimension	Financial dimension = NULL
Vendor master	Invoice account	Invoice account = NULL
Customer master	Customer group + Credit limit	Customer group IN ('Retail', 'Wholesale') AND Credit limit = 0
Customer master	Customer group + Delivery mode	Customer group = 'International' AND Delivery mode IS NULL
Customer master	Customer status	Customer status = On hold
Customer master	Delivery terms	Delivery terms = NULL
Customer master	Priority	Priority = "High"
Customer master	Financial dimension	Financial dimension = NULL
Customer master	Customer Group + Terms of Payment	Customer Group=ABC AND Terms of Payment = NULL

Master Data Management

Master Data Change Order



Number Sequence

- › Begin by setting up a number sequence for the Master Data Change Order. To do this, create a new number sequence using the standard Number Sequence form, and then assign it to the 'Change Order' reference under the Master Data Management Parameters.

Finance and Operations

Search for a page

USMF

Standard view

Master data management parameters

General

Number sequences

Set up Number Sequence for MDM Parameters

Group

Reference	Number sequence ...	Sales tax b...
Change order	MDCO	

Order Id

MDM Master

› Next, configure the MDM Categories, MDM Priorities, and MDM Severities according to the business requirements.

The image displays three screenshots of the MDM Master configuration interface, each showing a different configuration screen. All three screens have a dark blue header with the text "Finance and Operations" and a sidebar with navigation icons. The top bar of each screen contains a back arrow, an "Edit" icon, a "+ New" button, a "Delete" icon, and an "Options" button.

MDM Categories: The first screenshot shows the "MDM Categories" screen. It has a "Standard view" dropdown. Below it is a table with two columns: "Category" and "Description". The "Change" category is selected and highlighted in blue.

Category	Description
Change	Change
Issue	Issue
New Development	New Development

MDM Priorities: The second screenshot shows the "MDM Priorities" screen. It has a "Standard view" dropdown. Below it is a table with two columns: "Priority" and "Description". The "Emergency" priority is selected and highlighted in blue.

Priority	Description
Emergency	Emergency
Routine	Routine
Urgent	Urgent

MDM Severities: The third screenshot shows the "MDM Severities" screen. It has a "Standard view" dropdown. Below it is a table with two columns: "Severity" and "Description". The "High" severity is selected and highlighted in blue.

Severity	Description
High	High
Minimal	Minimal
Normal	Normal
Very high	Very high

Master Data Change Order

- › Now, create a new Master Data Change Order. In the master data change order tab, the Change Order number will be generated based on the assigned number sequence. Enter the required values in the Title, Category, Priority, and Severity fields, and select the appropriate master form from the Master Selection, depending on where the data needs to be updated. In our case we are changing field data on the product, so the released product has been selected.

Finance and Operations

Search for a page

USMF

AD

Save + New Delete Change order Options

Change status
Open Complete
Approve Cancel
Process

Business impact
Search
View previous search

Master Data Change Order | Standard view

Master Data Change Orders New

Lines Header

Master data change order

Change order: MDOC-000000004
Status: New
Priority: Emergency
Master Selection: Released Products
Title: MDM T 01
Category: Change
Severity: Very high
WorkFlow Status: Draft

Impacted Records

+ New Edit Save Delete Business impact

Lin...	Master Selection	Field Selection	Old Value	New Value
--------	------------------	-----------------	-----------	-----------

Master Data Change Order

- › "Next, in the 'Impacted Record' tab, add a new line and enter the required details. In this example, we are updating the field 'ABC Value' from 'None' to 'A' for the item 'MDM P 14'. Submit the change order to the workflow. At this stage, under the change status menu, the 'Process' button is disabled and will only be enabled once the change order is approved.

The screenshot displays the 'Master Data Change Order' form in the Dynamics 365 interface. The form is titled 'Master Data Change Order' and is in 'Standard view'. The 'Change status' menu is open, showing options: Open, Complete, Approve, Cancel, and Process. The 'Process' button is highlighted with a red box. The 'Business impact' section shows 'Search' and 'View previous search'. The form fields include: Change order (MDOC-000000004), Title (MDM T 01), Status (New), Category (Change), Priority (Emergency), Severity (Very high), Master Selection (Released Products), and WorkFlow Status (Draft). The 'WorkFlow Status' field is also highlighted with a red box. Below the form is the 'Impacted Records' table, which is highlighted with a red box. The table has columns: Lin..., Master Selection, Field Selection, Old Value, and New Value. It contains one record: 1 MDM P 14, ABCValue, None, A.

Lin...	Master Selection	Field Selection	Old Value	New Value
1	MDM P 14	ABCValue	None	A

Master Data Change Order

- › Once the workflow is approved, click the 'Process' button to apply the changes to the master data..

The screenshot displays the 'Master Data Change Order' management interface. The top navigation bar includes 'Finance and Operations' and a search bar. The left sidebar contains navigation icons. The main area shows the 'Master Data Change Order' form with the following fields:

- Change order:** MDOC-000000004
- Title:** MDM T 01
- Status:** New
- Category:** Change
- Priority:** Emergency
- Severity:** Very high
- Master Selection:** Released Products
- WorkFlow Status:** Approved

The 'Process' button is highlighted in the top left. Below the form is a table of 'Impacted Records' showing a single record with a change from 'None' to 'A'.

Lin...	Master Selection	Field Selection	Old Value	New Value
1	MDM P 14	ABCValue	None	A

Master Data Change Order

› Currently, the value of the field is 'None'..

The screenshot displays the 'Finance and Operations' application interface for MDM Setup. The top navigation bar includes a search bar and various icons. The main menu on the left lists 'Released product details' and 'Standard view'. The central area is titled 'MDM P 14 : MDM P 14' and shows a 'Coverage group' dropdown. Below this, the 'Manage costs' section is active, displaying a table with columns for 'POSTING', 'PRICE UPDATE', 'PRICES', 'CHARGES', 'ABC CLASSIFICATION', and 'Revenue'. The 'ABC CLASSIFICATION' column is highlighted with a red box, showing 'Value' and 'Margin' both set to 'None'. The 'Revenue' column shows 'None' and 'Carrying cost' shows 'None'. The 'Manage projects' section at the bottom shows a 'Project category' dropdown.

POSTING	PRICE UPDATE	PRICES	CHARGES	ABC CLASSIFICATION	Revenue
Item group AudioRM	Latest cost price ☐ No Date of price 	Unit ea Price 0.00 Price quantity 1.00	Price charges 0.00 Charges quantity 0.00 Incl. in unit price ☐ No	Value None Margin None	None Carrying cost None

Master Data Change Order

- › After processing, the field value is successfully updated from 'None' to 'A'.

The screenshot displays the SAP MDM Setup interface for 'Released product details'. The main title is 'MDM P 14 : MDM P 14'. The 'ABC CLASSIFICATION' field is highlighted with a red box, showing the value 'A'. The interface includes various tabs and sections for managing product data.

Released product details | Standard view

MDM P 14 : MDM P 14

Approved

Coverage group

Manage costs

POSTING

Item group

AudioRM

COSTING

Cost group

Use cost price by variant

No

PRICE UPDATE

Latest cost price

No

Date of price

PRICES

Unit

ea

Price

0.00

Price quantity

1.00

CHARGES

Price charges

0.00

Charges quantity

0.00

Incl. in unit price

No

ABC CLASSIFICATION

Value

A

Margin

None

Revenue

None

Carrying cost

None

Manage projects

Project category

Master Data Version

- › Users can view the associated Master Data Change Order for a specific master record under the Master Data Management menu.

The screenshot displays the 'Master Data Version' page within the 'Finance and Operations' application. The page includes a search bar, navigation icons, and a table of change orders. The table has the following columns: Change order, Master Selection, Field Selection, Old Value, New Value, Status, WorkFlow Status, and Created date and time. Two records are shown:

Change order	Master Selection	Field Selection	Old Value	New Value	Status	WorkFlow Status	Created date and time
MDOC-000000004	MDM P 14	ABCValue	None	A	Processed	Approved	6/23/2025 2:49:47 PM
MDOC-000000005	MDM P 14	NetWeight	0	10	New	Draft	6/24/2025 6:56:02 AM

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USA, Canada, UK, India



Mail Us

sales@dynatechconsultancy.com



Phone

+1 844 787 3365



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