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Accelerate Business

DynaTech | Systems

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.

AICPA SOC 2

Microsoft Solutions Partner

Great Place To Work® Certified FEB 2025-FEB 2026 INDIA

D-U-N-S® REGISTERED™

ISO 9001:2015

CMMI level 3

150+

Global Projects

100+

Happy Clients

450+

Expert Minds

DynaTech

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

Why Master Data Management Is Critical for Enterprise Success

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.

Centralized Policy Management

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

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

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

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

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

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.

Complete Visibility into Access Rights

Gain a centralized, easy-to-navigate view of user permissions—know exactly who can create, edit, view, or delete master records across your organization.

Enforce Least-Privilege Access

Apply role-based security to ensure that users only have the access they need—nothing more. Limit sensitive operations like bulk updates to authorized power users or data governance teams.

Governed Access = Trusted Data

Strengthen compliance and data trust by controlling access at the field, record, and role level, reducing risk and eliminating unauthorized changes.

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.

Instantly Activate Audit Trails

Easily enable comprehensive audit logging for critical master data entities—without complex setup or performance overhead.

On-Demand Access to Change History

Keep your audit logs readily available to support internal reviews, external audits, or compliance reporting—anytime, anywhere.

Quick Insights for Business Queries

Effortlessly trace who created or modified a master record, when, and what was changed. Empower business and IT teams to respond quickly to inquiries or exceptions.

1 Data Completeness Rules

Ensure essential fields are filled.

- **Mandatory Fields Not Populated**: E.g., vendor master missing payment terms, customer missing credit limit.
- **Address Completeness:** Country, city, zip/postal codes.
- **Bank Details Check:** Vendors/customers missing IBAN/SWIFT or account number.

2 Data Consistency Rules

Detect mismatches across related records.

- **Duplicate Records:** E.g., same name, tax ID, or phone number across vendors/customers.
- **Inconsistent Naming Conventions:** Product names, legal entity names, etc.
- **Mismatch Between Legal Entity and Country-Specific Attributes:** E.g., VAT format doesn't match the country.

3 Data Accuracy Rules

Validate data formats and integrity.

- **Invalid Email or Phone Number Formats**
- **Incorrect Tax Numbers or VAT IDs:** Validate against country-specific formats.
- **Currency Code Mismatch:** Currency not matching country of operation.

4 Data Lifecycle Rules

Ensure master data is current and relevant.

- Inactive Customers/Vendors Not Flagged
- **Stale Records:** E.g., items not transacted in 12+ months.
- Outdated Bank Info or Contact Persons

5 Security and Compliance Rules

Check for compliance and access integrity.

› Unauthorized User Edits on Master Data

› Missing Change Log/Audit Trail

› **Segregation of Duties Violations:** E.g., same user creating and approving records.

6 Referential Integrity Rules

Ensure linked data is valid.

› **Customer Assigned to Non-existent Sales Region**

› **Product Assigned to Invalid Item Group**

› **Missing Default Financial Dimensions**

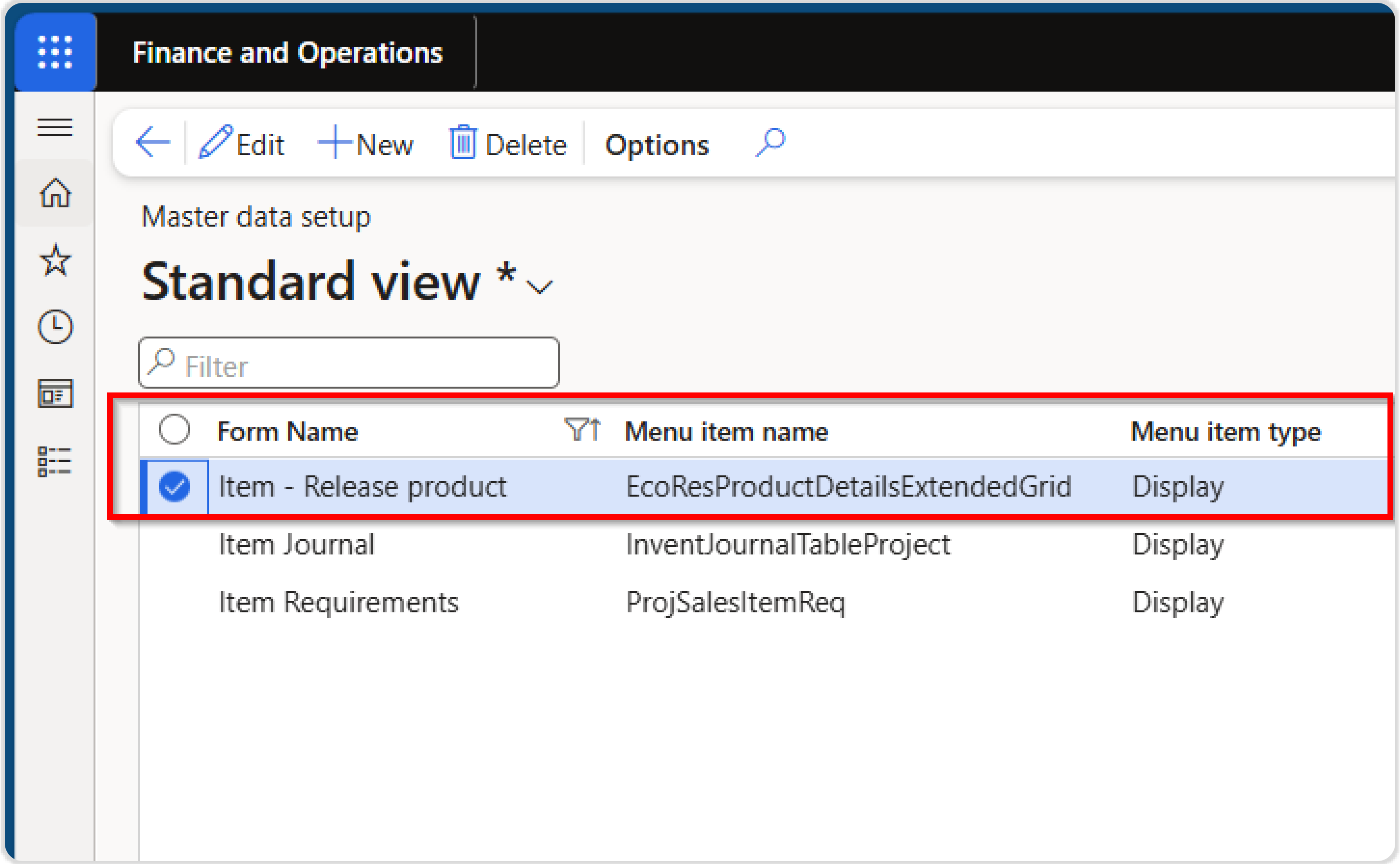
7 Performance and Volume Rules

Spot potential performance issues.

› **Excessive Custom Fields with No Usage**

› **Large Master Data Tables with No Archival Strategy**

› **Massive Number of Vendors with Zero Transactions**


Finance and Operations
Edit
New
Delete
Options
Master data setup
Standard view *
Filter
Form Name
Menu item name
Menu item type
Item - Release product
EcoResProductDetailsExtendedGrid
Display
Item Journal
InventJournalTableProject
Display
Item Requirements
ProjSalesItemReq
Display

Edit Delete Update View Permission Users Options

User security configuration

Standard View *

Filter

User Id	User Name	Designation	Department	Email Id	Role	Sub Role	Duty	Privilage	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 iten
aarushi.shah.ext	Aarushi Shah	Global Process Improve...	Romania	aarushi.shah...	ENVU_View_Only		ENVU_Duty_View_Only	ENVU_Privilege_View_Only	Menu iten
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 iten
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 iten
aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Accounts receivable manager		Enable quotation to sales order process	View Released products	Menu iten
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 iten
aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Purchasing agent		Maintain approved vendors	View Released products	Menu iten
aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Purchasing agent		Maintain product prices and discount master	View Released products	Menu iten
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 iten
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 iten
aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Discovery Purchasing Agent		Maintain	...sed products	Menu iten
aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Discovery Purchasing Agent		Maintain product prices and discount master	View Released products	Menu iten
abhijit.baruah	Abhijit Baruah	Key Acct Mgr	China	abhijit.barua...	Envu_SalesAndMarketing_In...		Inquire into quotation to sales order policies	View Released products	Menu iten
abhijit.baruah	Abhijit Baruah	Key Acct Mgr	China	abhijit.barua...	Envu_SalesAndMarketing_In...		Inquire into sales return order progress	View Released products	Menu iten
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 iten
achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Maintain warehouse operation master	View Released products	Menu iten
achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into warehouse operation master	View Released products	Menu iten
achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into RFID/barcode master	View Released products	Menu iten
achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into products for operations master	View Released products	Menu iten
achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Inventory accountant clerk		Maintain BOM calculation master	View Released products	Menu iten

Inquire into product purchase prices and discount master

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Finance and Operations | Secure D365 > Security User Trace Details > User security configuration | AR01 | HM

Edit | Delete | Update View Permission Users | Options

User security configuration

Standard View *

Filter

	Privilage	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
ıt 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
ıt master	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
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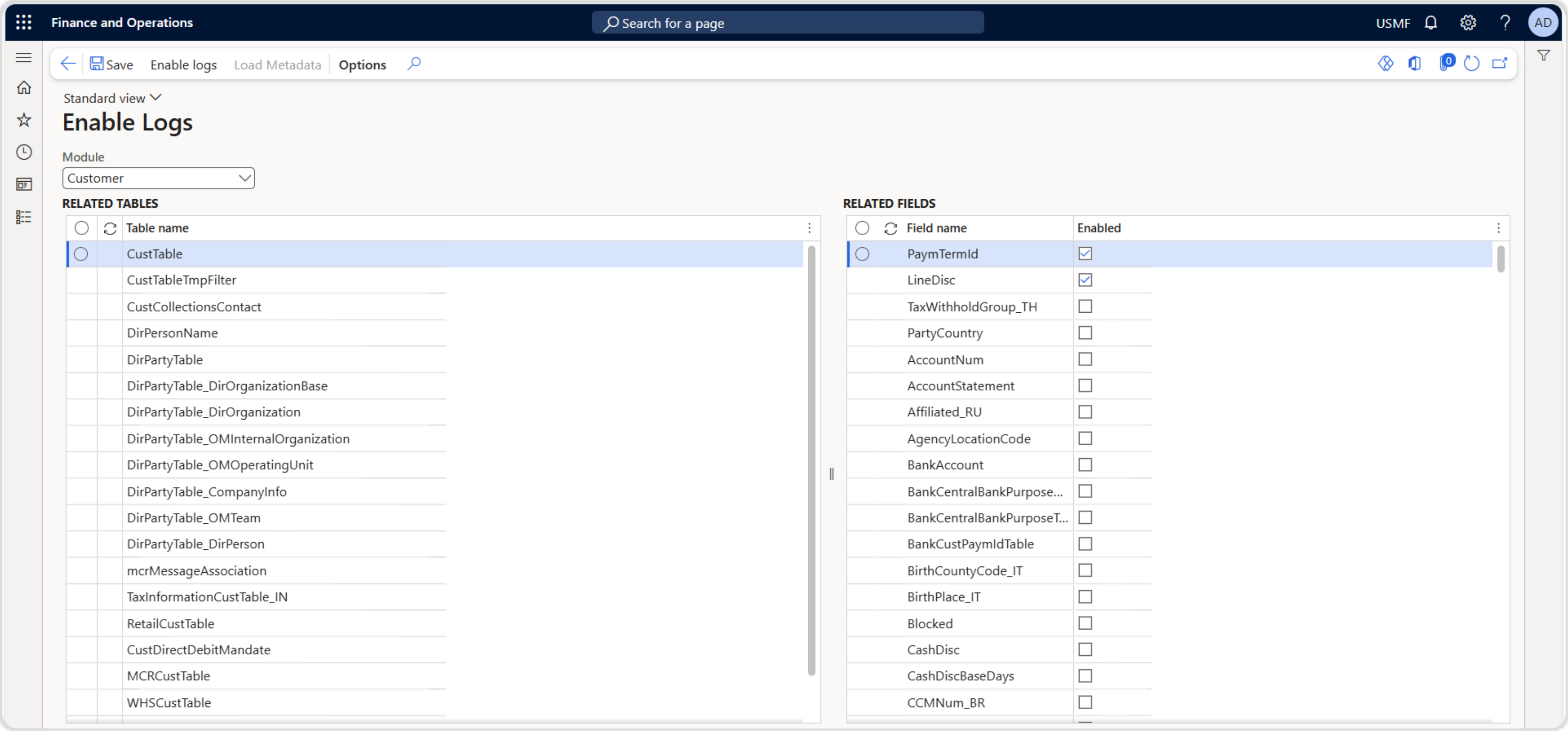
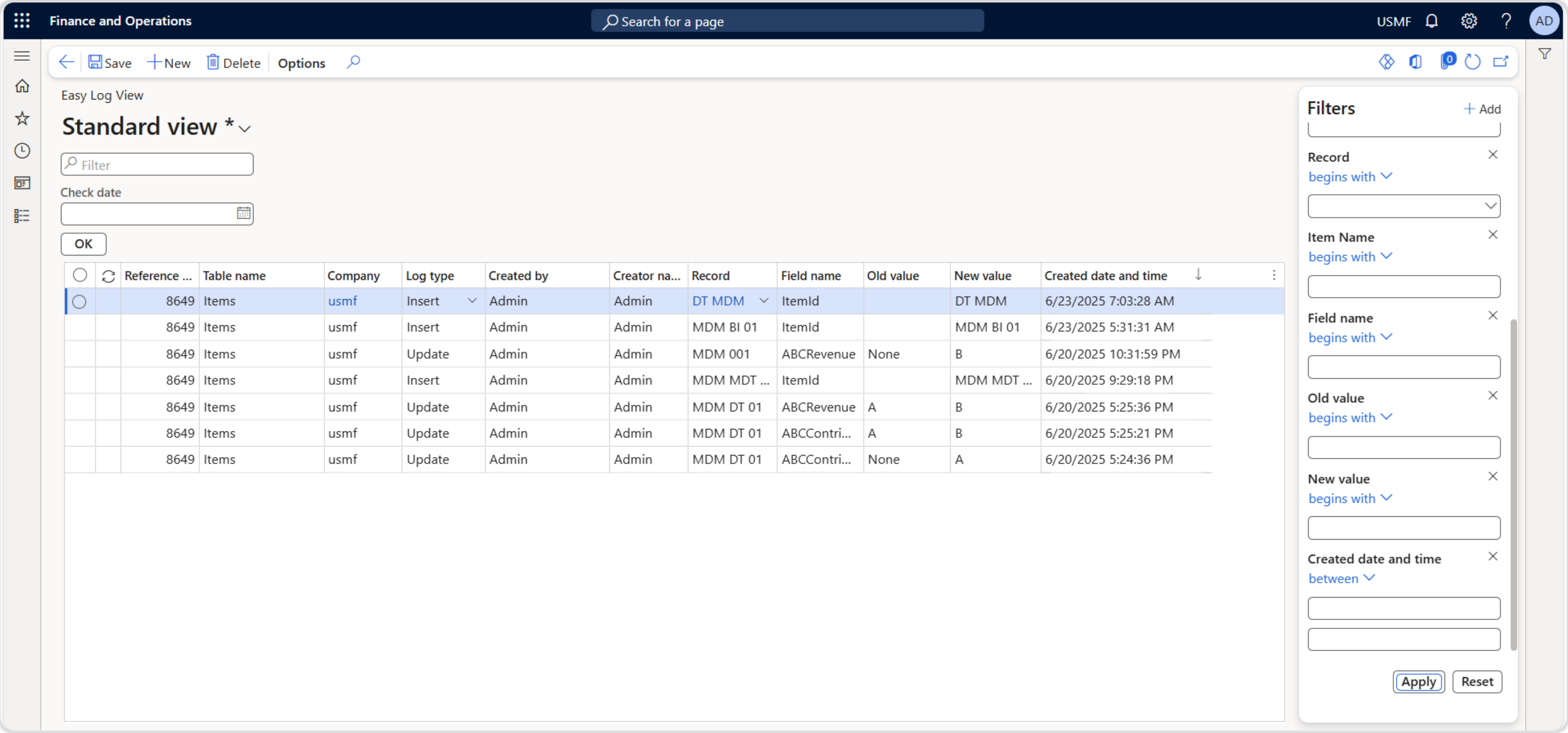
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
	View Released products	Menu item display	ECORESPRODUCTDETAILSEXTENDEDGRID	Allow	Unset	Unset	Unset	Unset	Team Members	Enabled	true
aster	View Released products	Menu item display	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

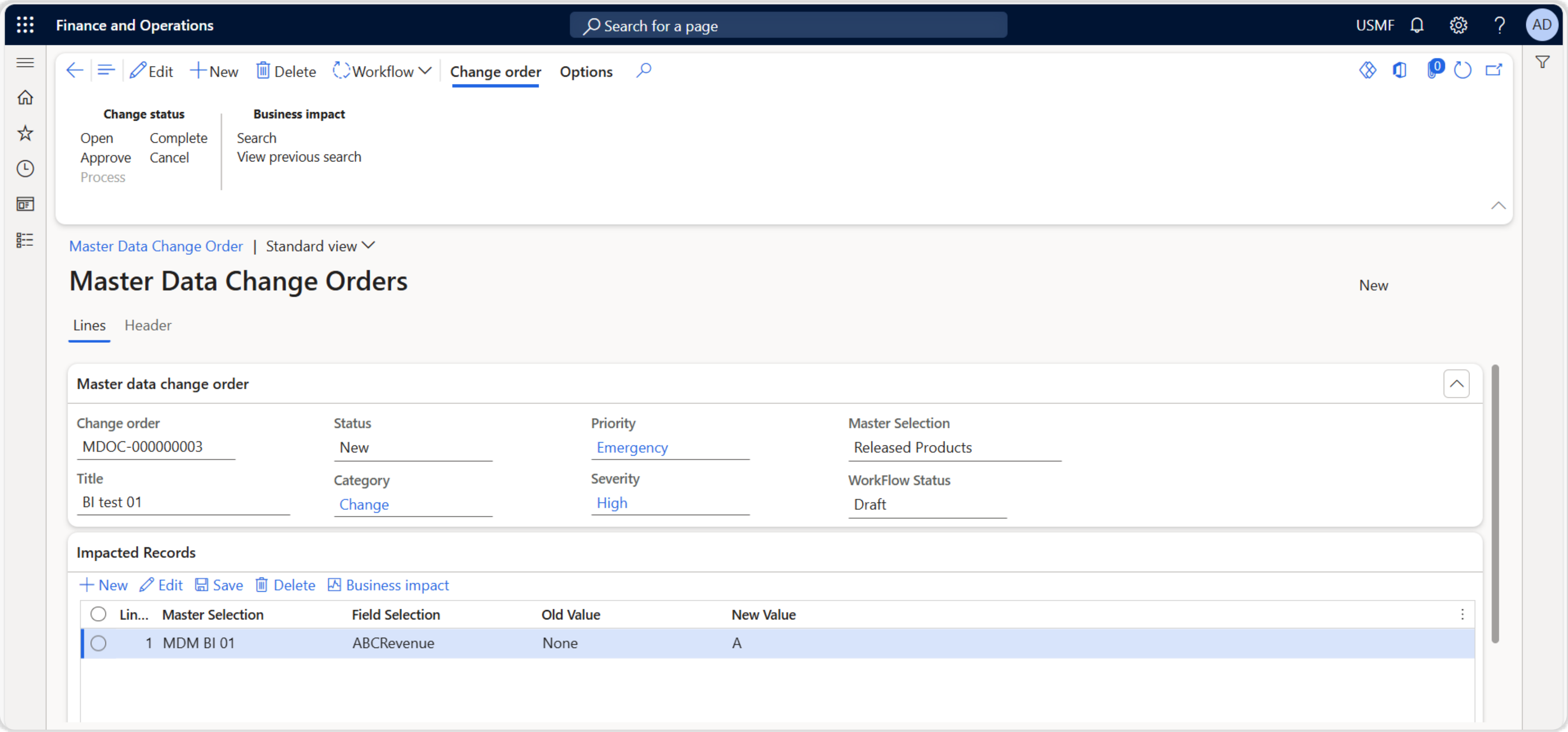
The user can enable logs based on the master records (Item, Customer, and Vendor). All related tables will appear based on the policy form in the related tables grid, and selecting a table will display its associated fields.




Finance and Operations
Search for a page
USMF
AD
Save
New
Delete
Options
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

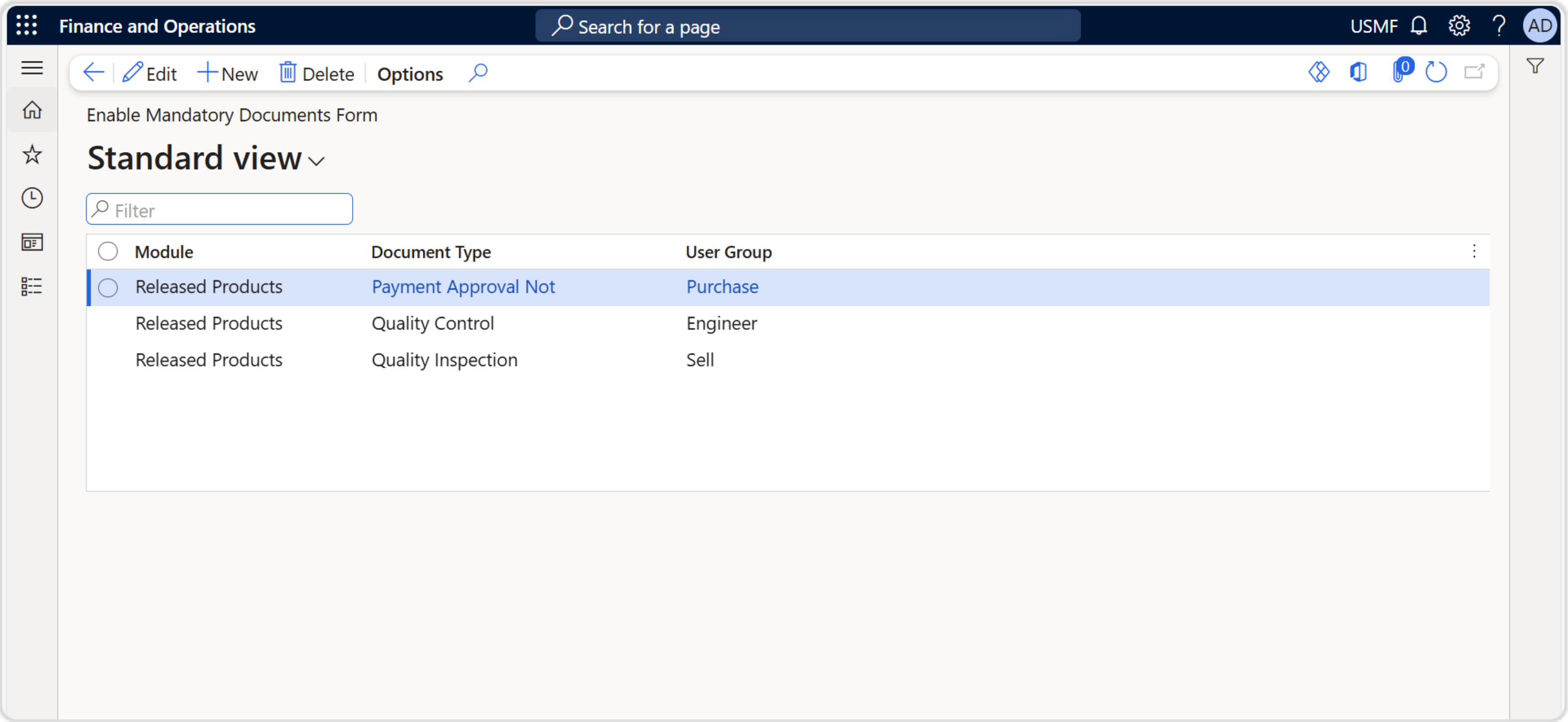
Master Data Change Order Form

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.



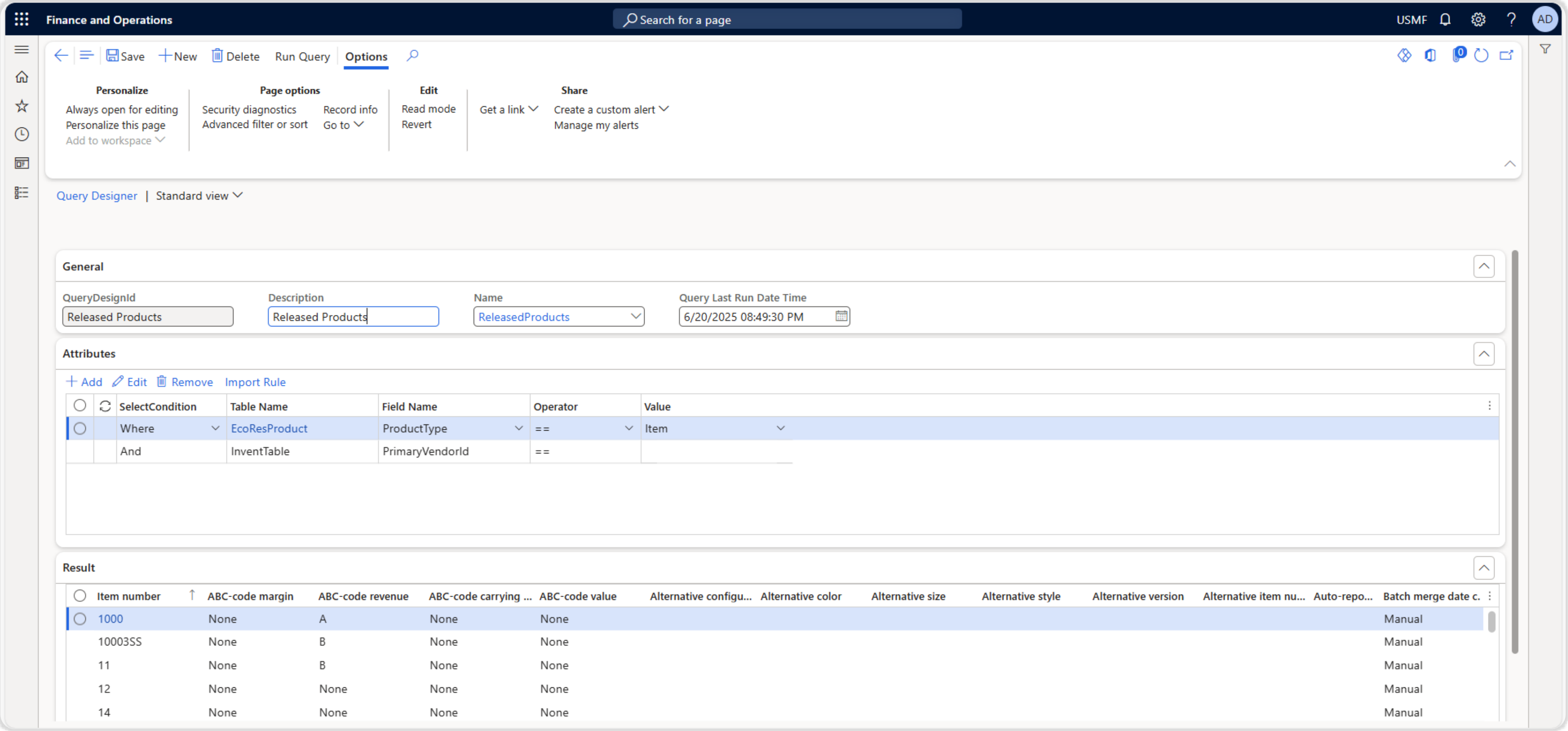
Enable Mandatory Document Form

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.



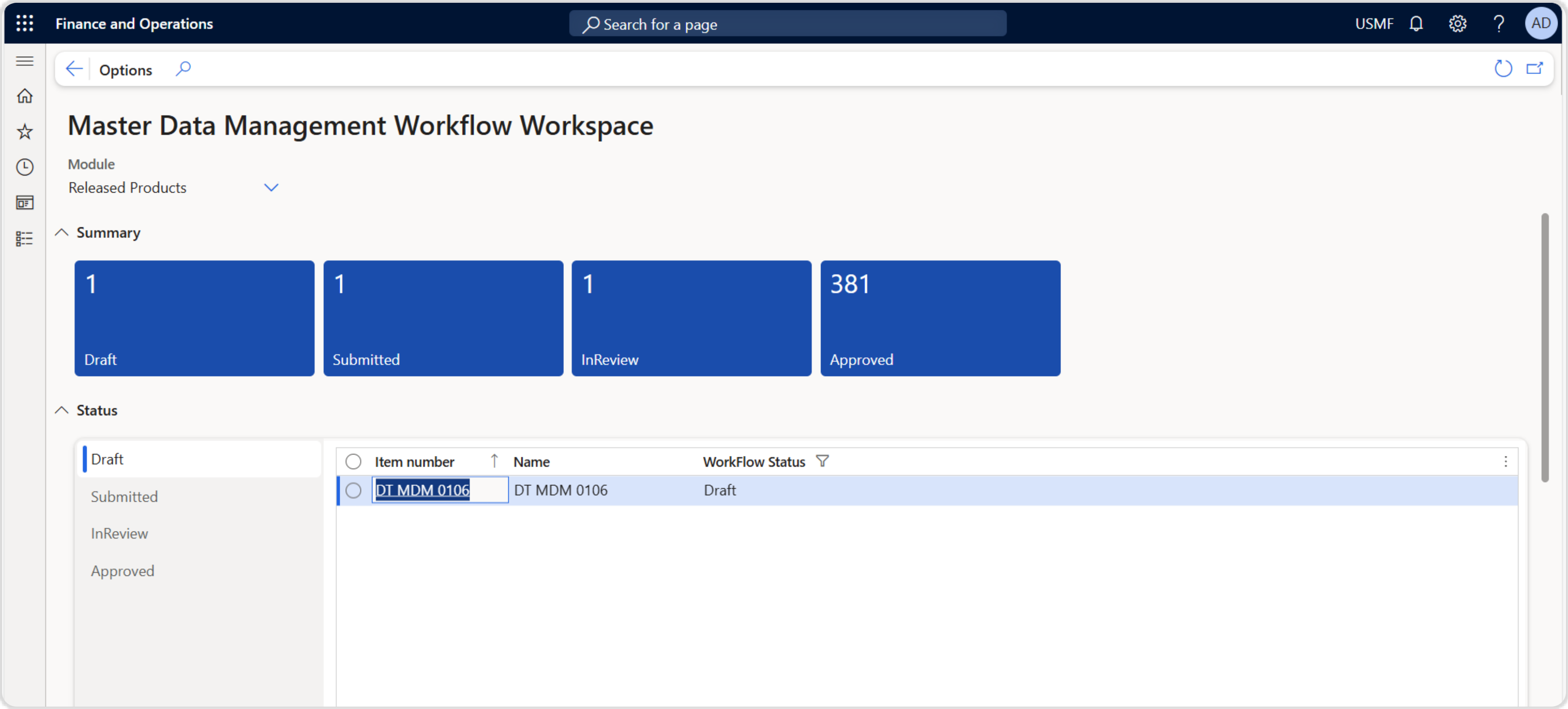
Query Engine

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



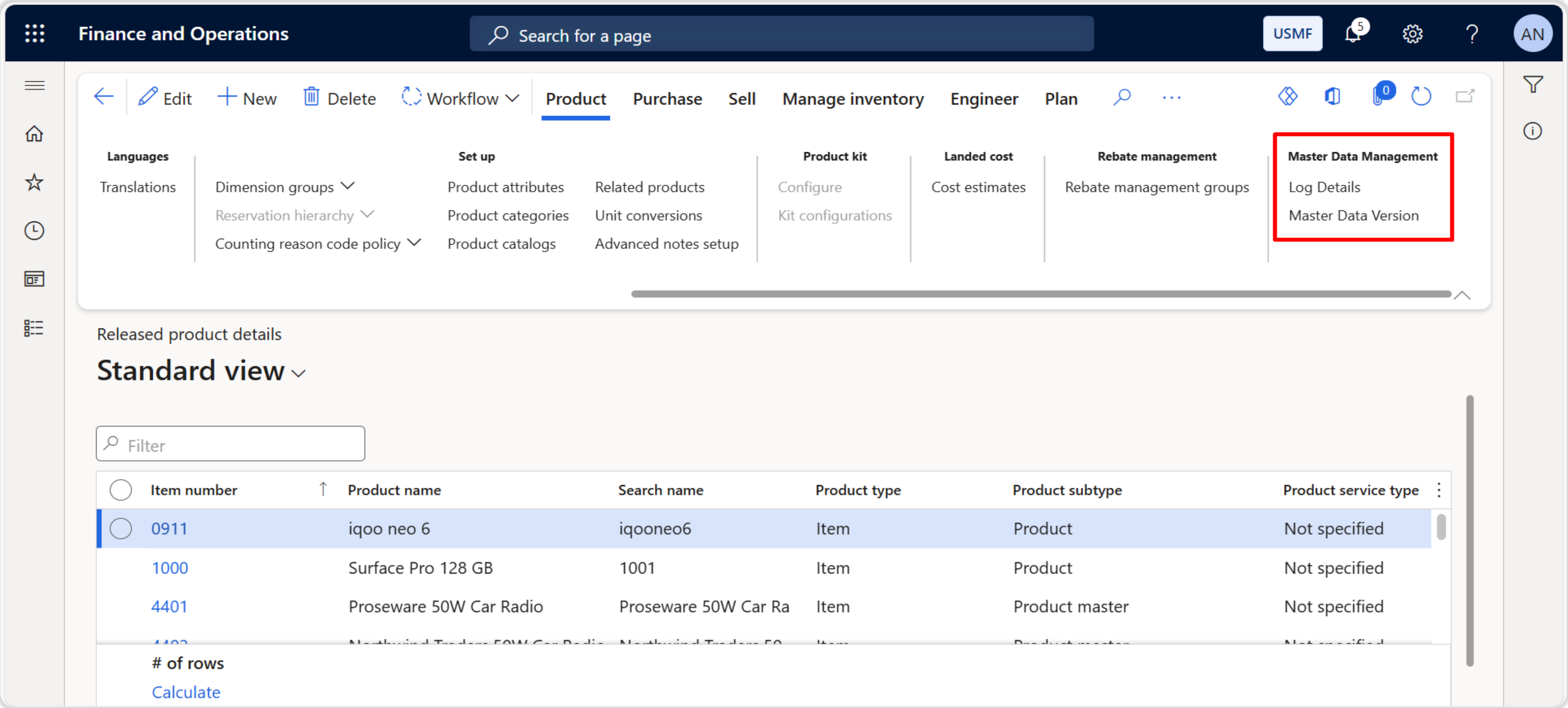
Master Data Management Workflow Workspace

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



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.



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 Transations)
    - 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

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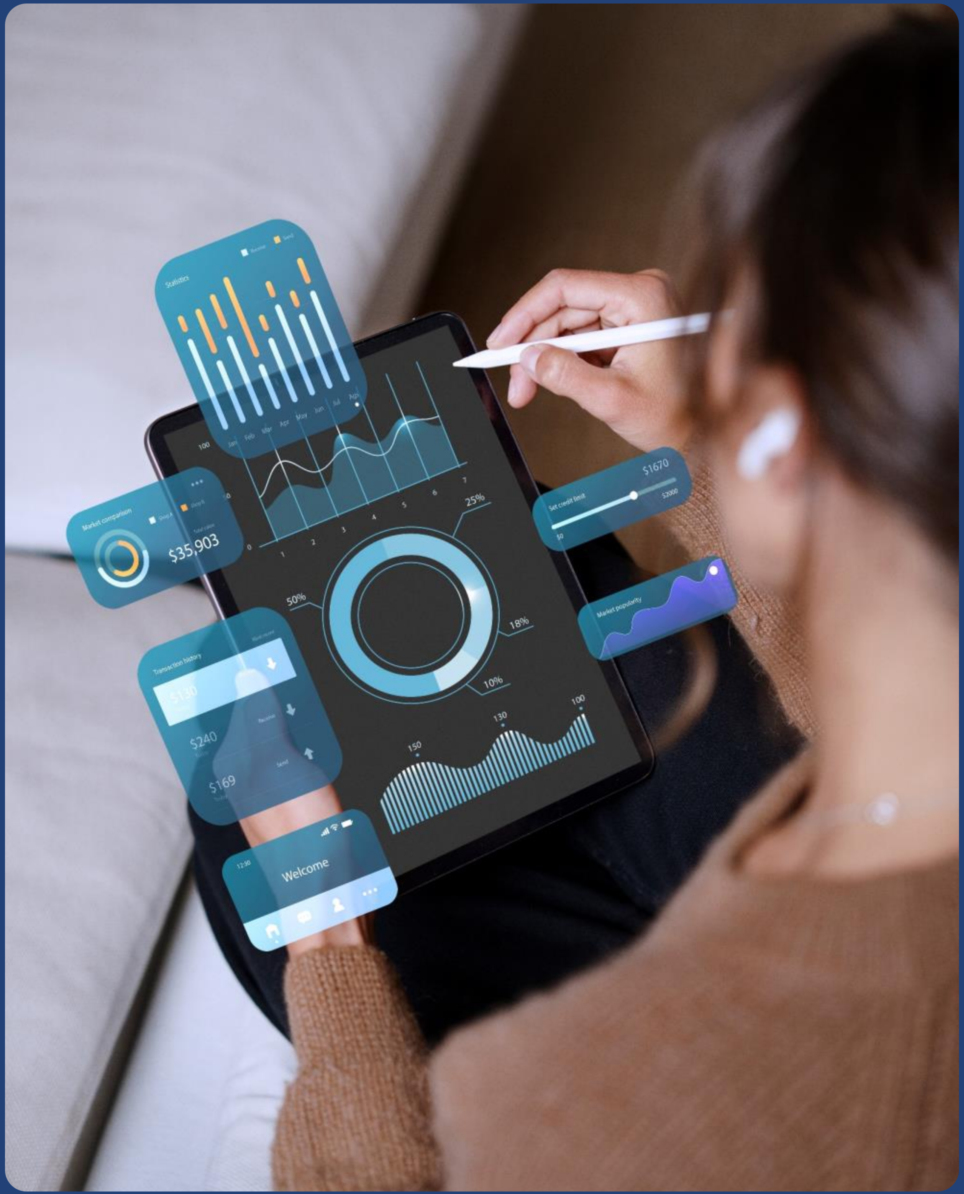
Master Data Management

Item Master



Introduction

- Overview of Master Data Management (MDM)
- Importance of item master data in business operations
- Objective: Understanding how to effectively manage Item Master in D365 F&O

What Is Master Data Management?

MDM

- A set of processes, policies, tools, and technologies
- To create and maintain a single, consistent, and accurate view of critical business data
- Key Entities
  Products
  Customers
  Vendor Etc.
- Focus today: Item Master (Product information)

Why is Item Master Data Important?

Item Master Data

- Central to supply chain, manufacturing, sales, and procurement ports
- Ensures consistency and accuracy across modules
- Reduces duplication and errors
- Impacts reporting, inventory accuracy, and regulatory compliance

MDM Lifecycle for Item Master in D365 F&O

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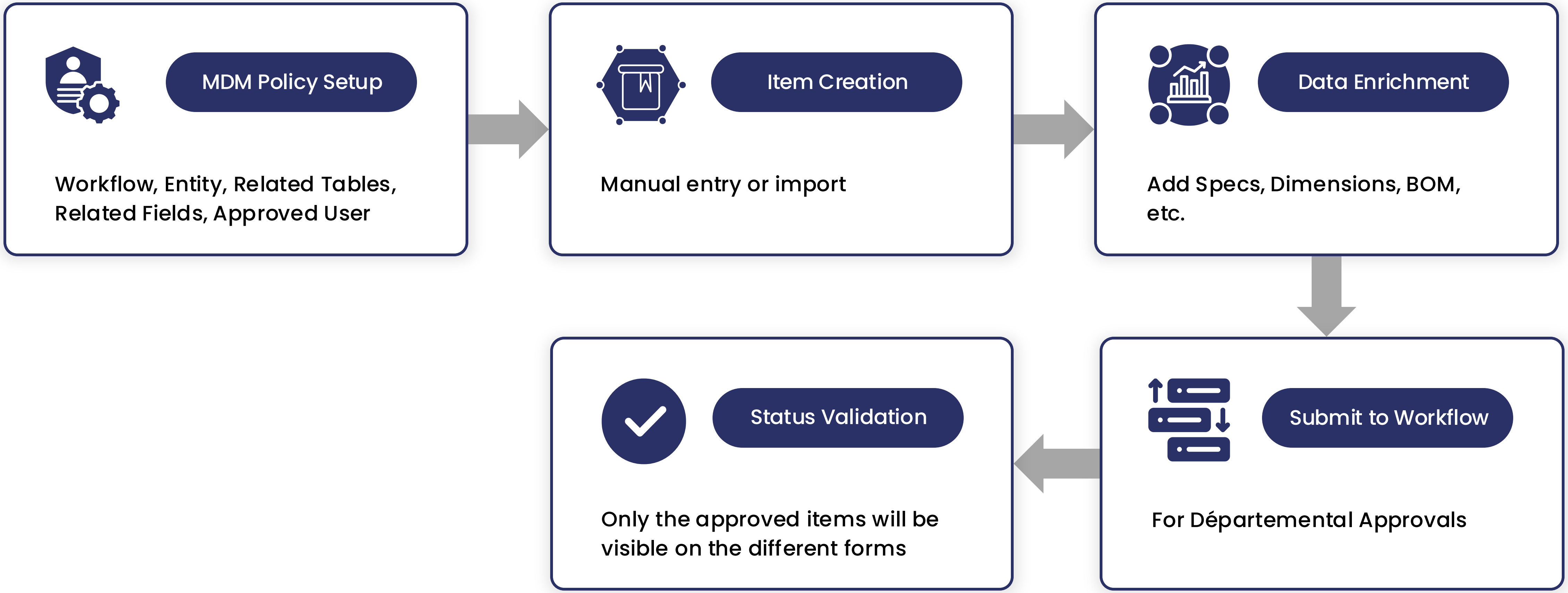
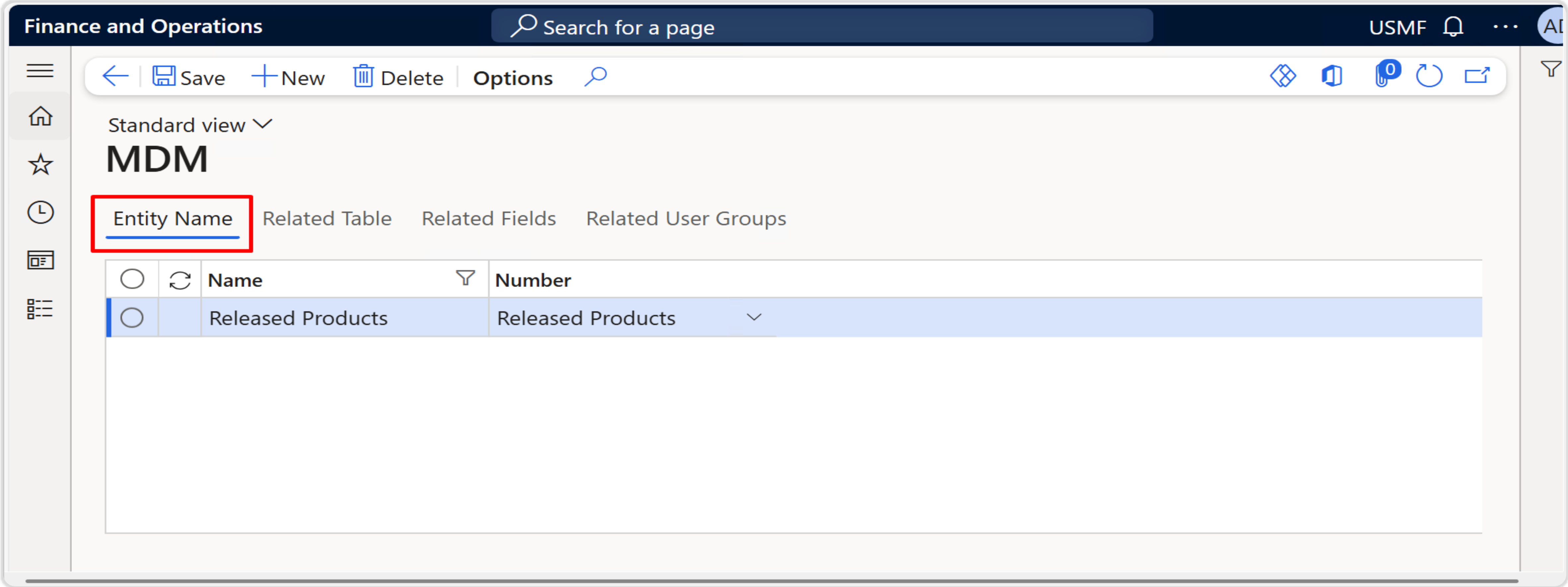
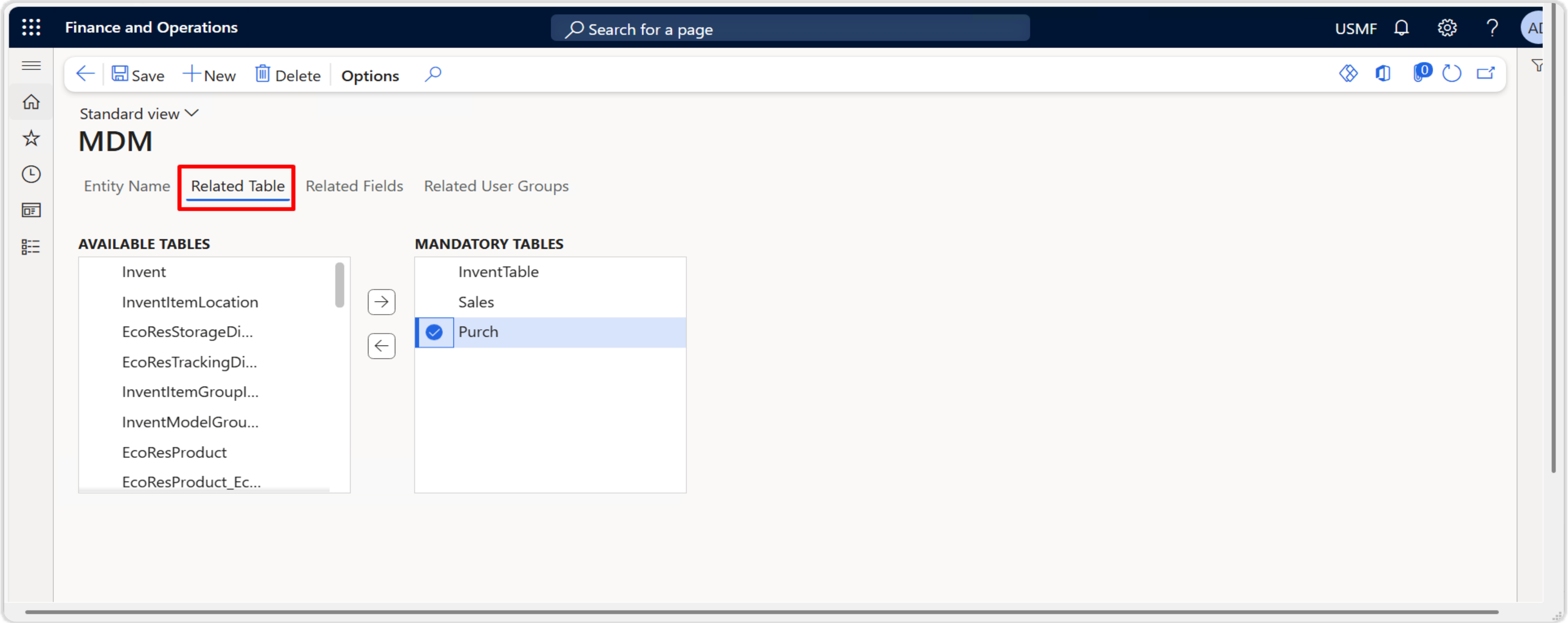


› We have a customized module where the user did a setup related to the Entity, tables, fields and workflow user groups, in short, we are activating the master data management.

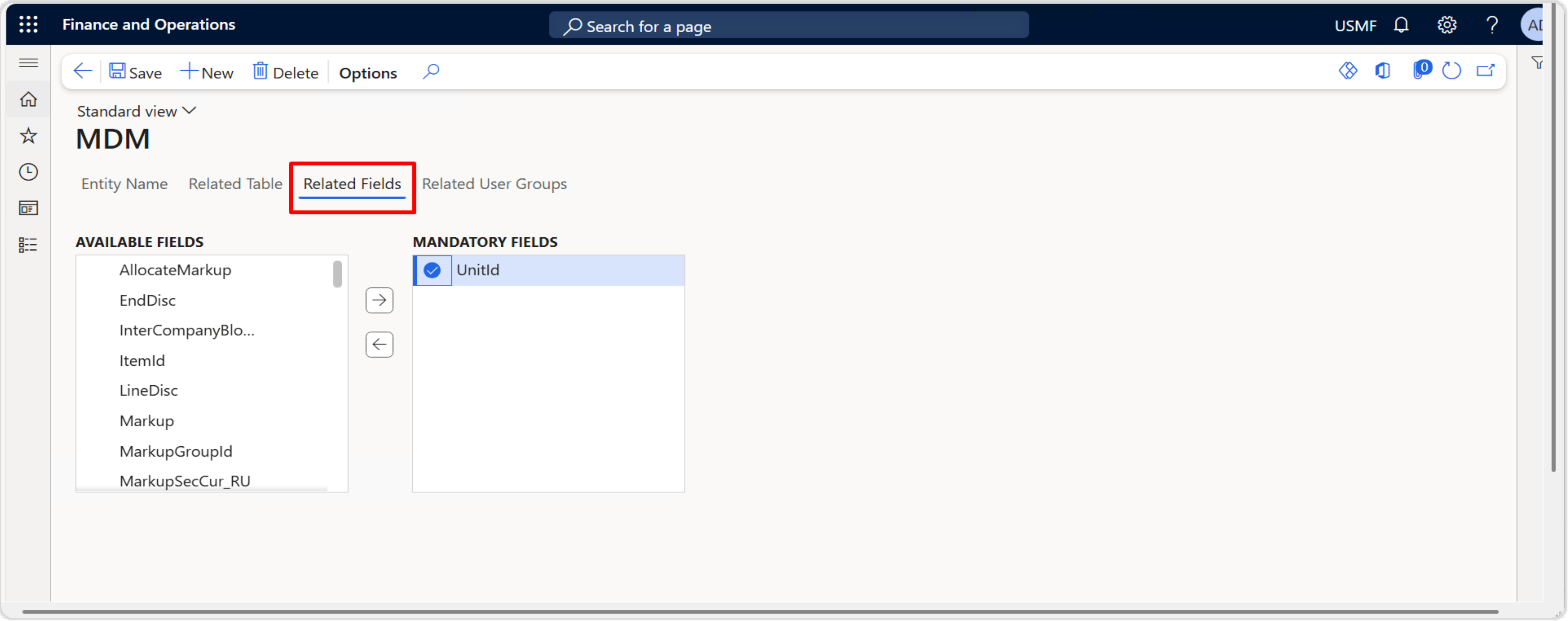
› **Entity Name** – On this form, the user will select the module where MDM needs to be activated. For now, we have selected Released products (Item Master)



- **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.

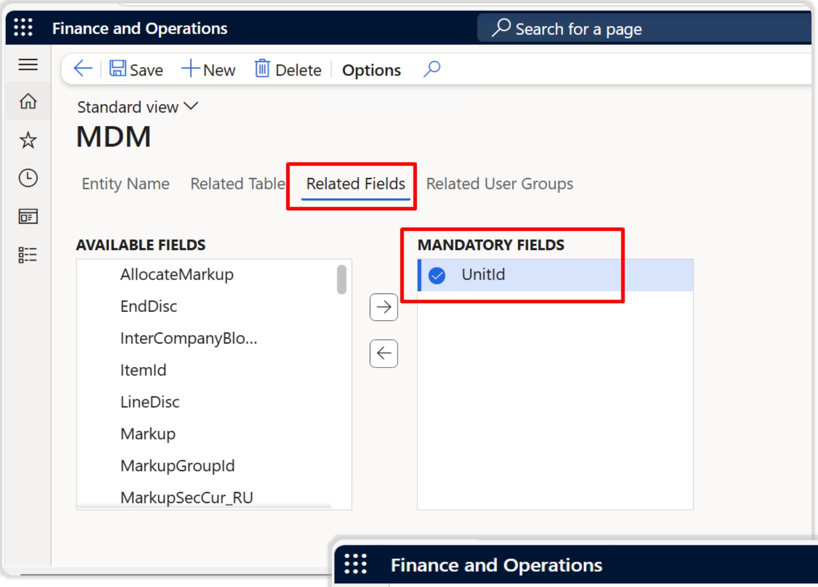


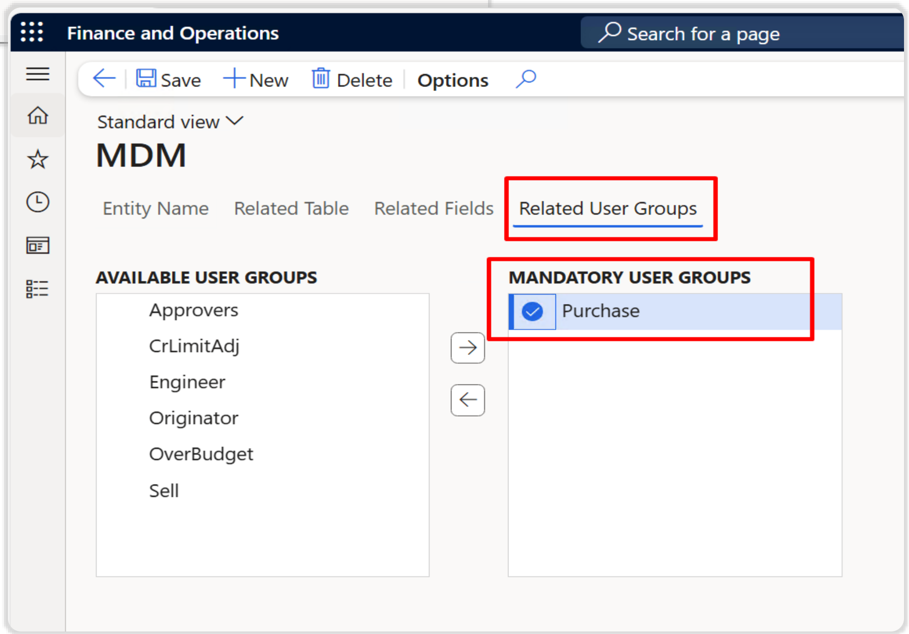
- **Related Fields –** In this grid, we have the list of available fields which is related to the table selected on the “Related Table-Mandatory Tables”. The user can move the fields from the Available fields grid to the Mandatory fields Grid. Also, we have mandated the fields for of table Sales and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



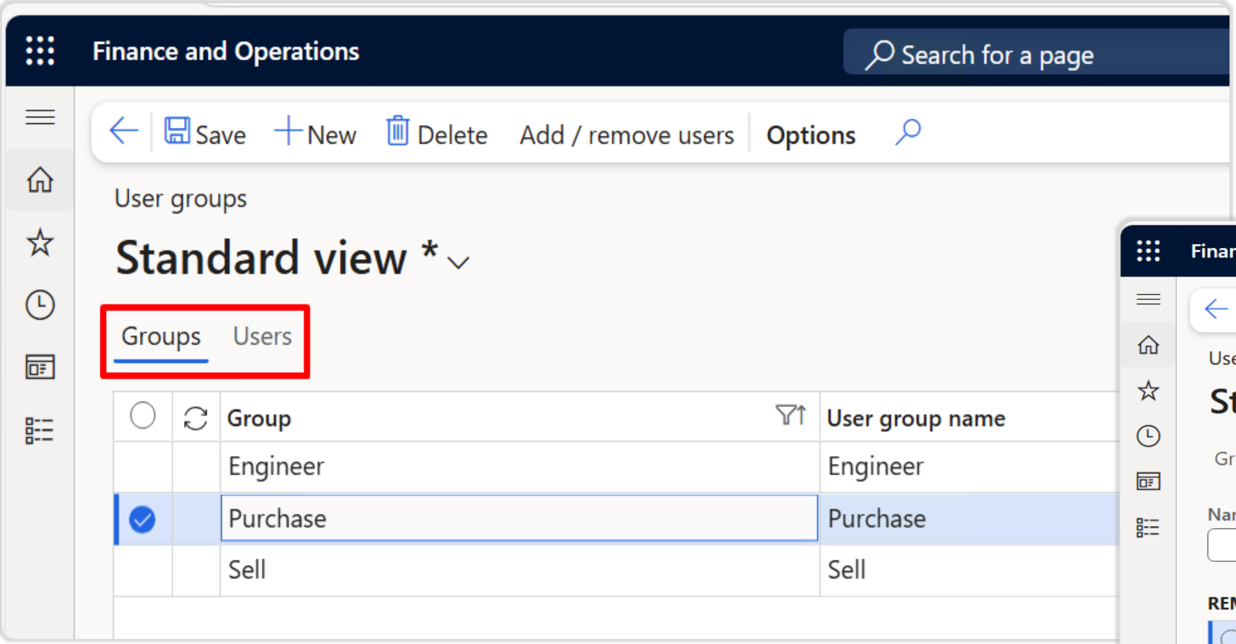
- **Related User Group** – In this grid, we have the list of available user groups. The user can move the groups from the Available user group grid to the Mandatory user group grid, This mandatory user group is linked with the field which was selected on the form "Related fields" Mandatory fields grid.

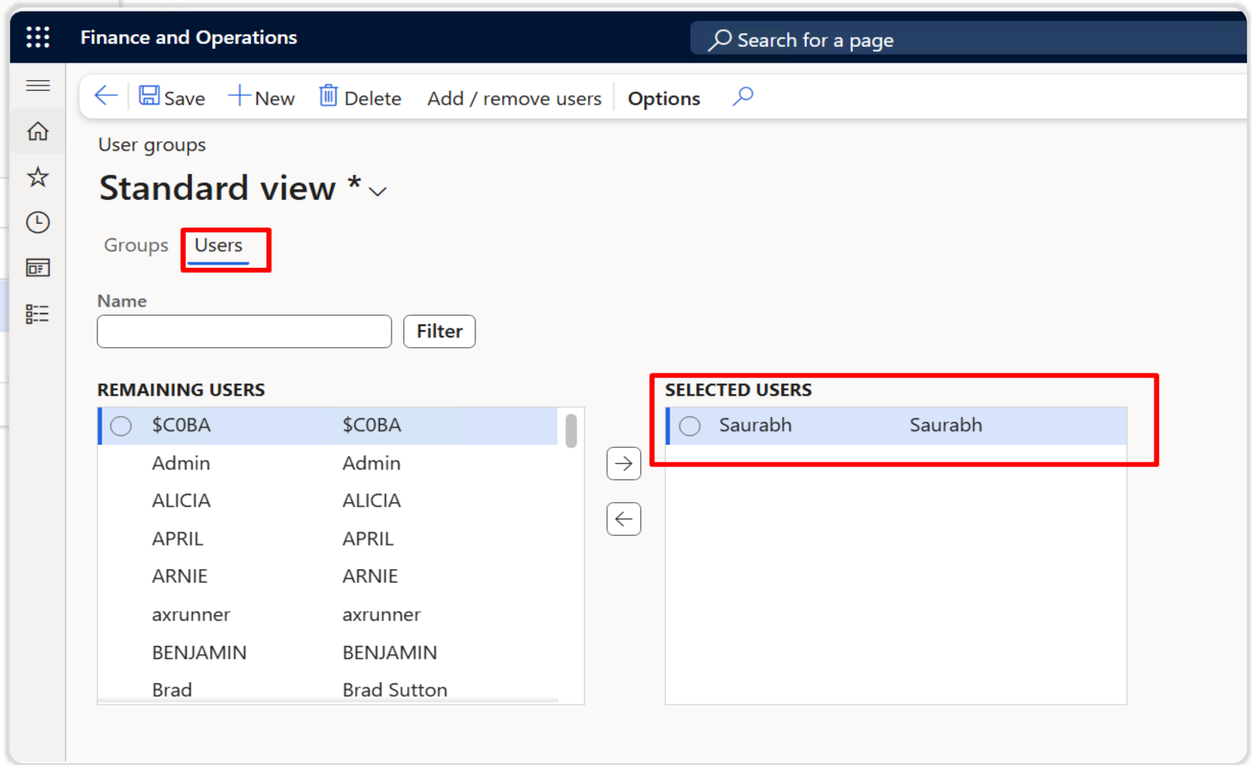
- **For example,** the user has selected a field "Unit ID" on the form "Related fields" under the Mandatory fields grid, and on the form Related user group, the user has moved the group Purchase from Available to Mandatory grid; in this way, the user has mandated the "Unit Id" field need to check buy Purchase group user.





› **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.





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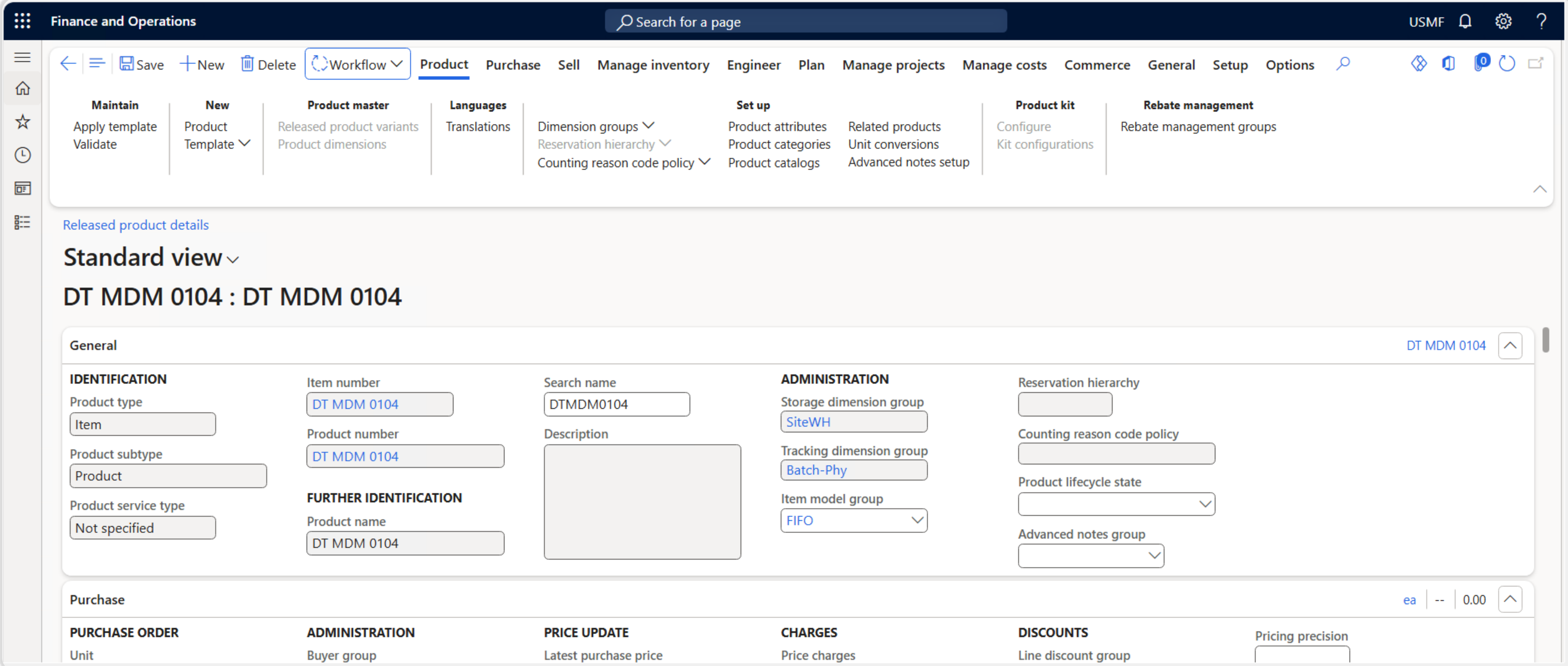
› Let's take an example: the user has created an Item and provided basic details.



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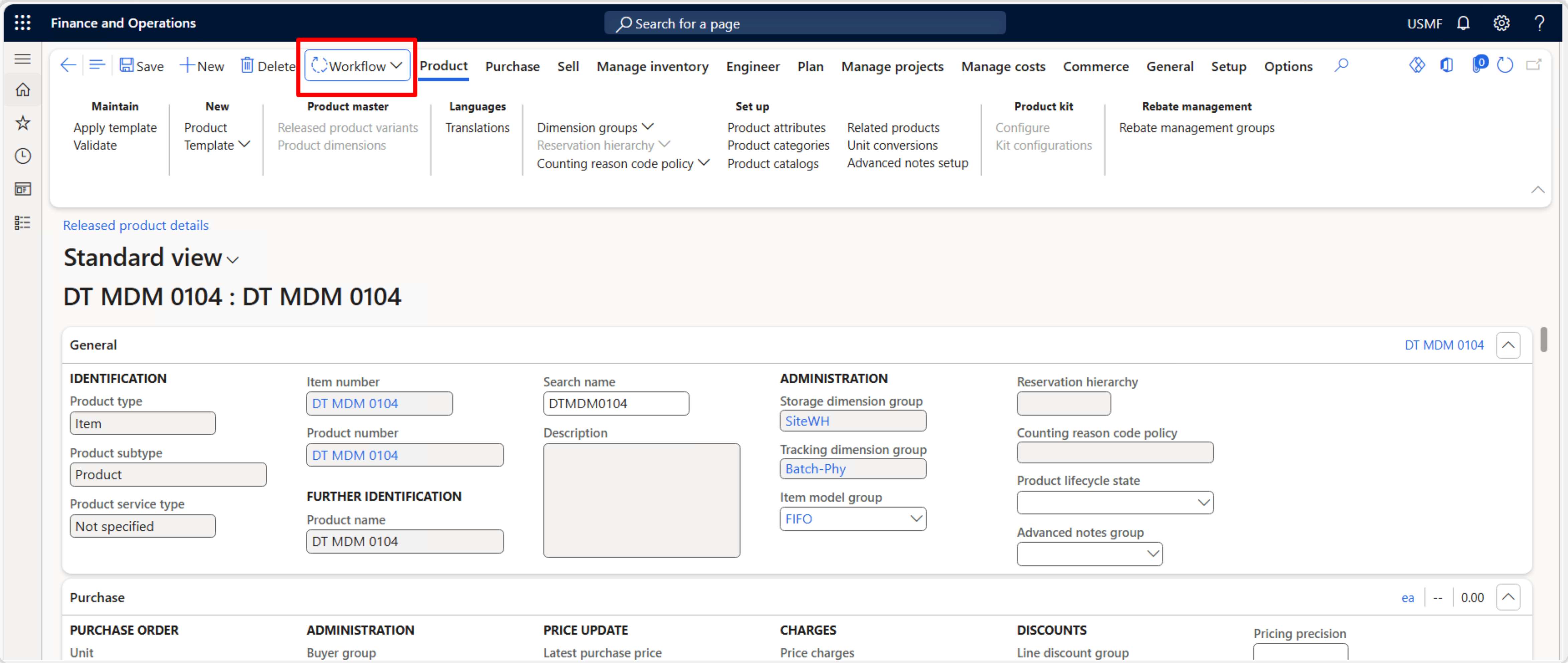
› As the MDM is activated for the item master, the user needs to submit the item to a workflow, and it is assigned to the required person as per the MDM policy.



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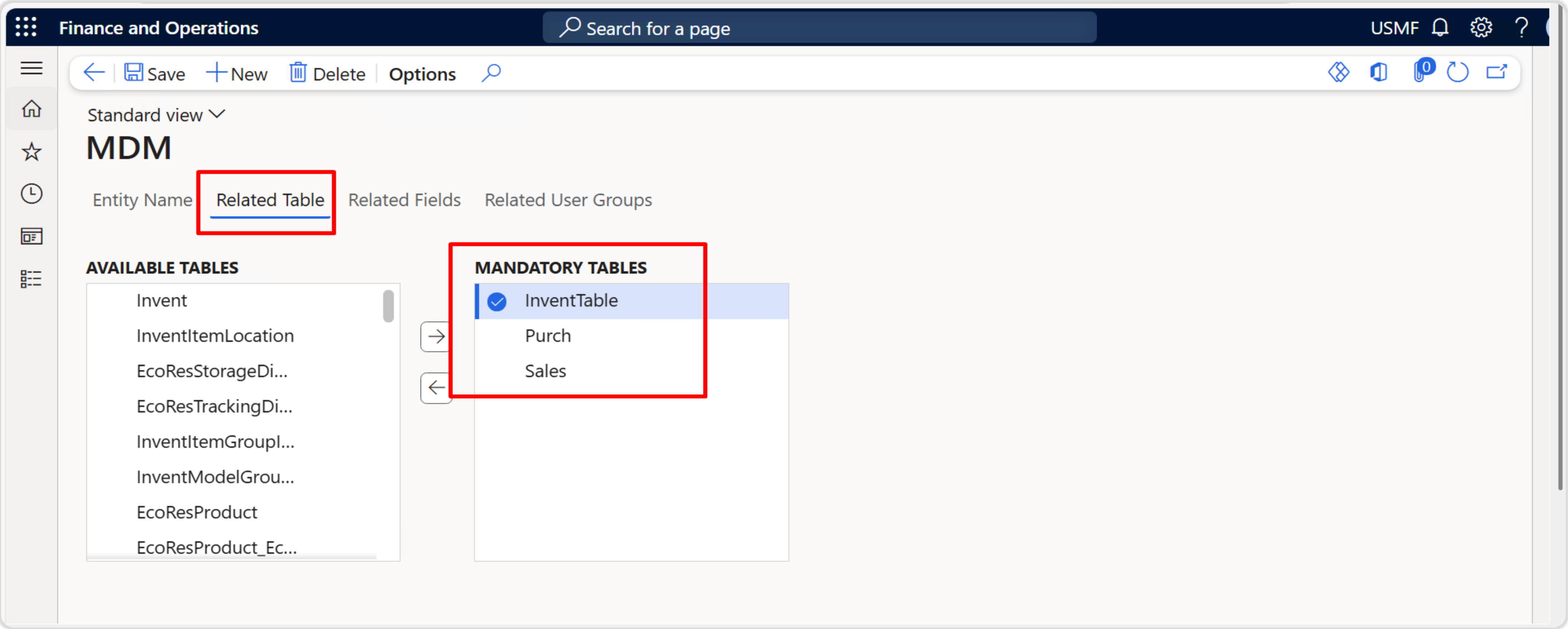
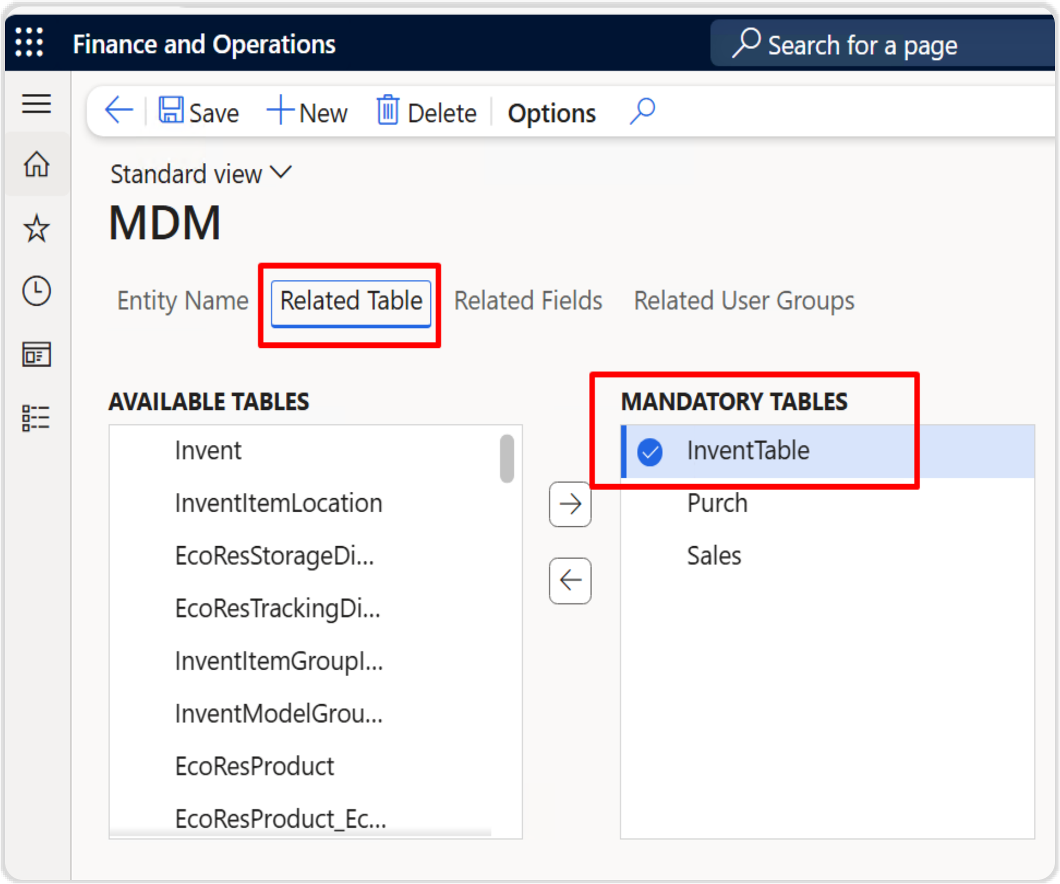
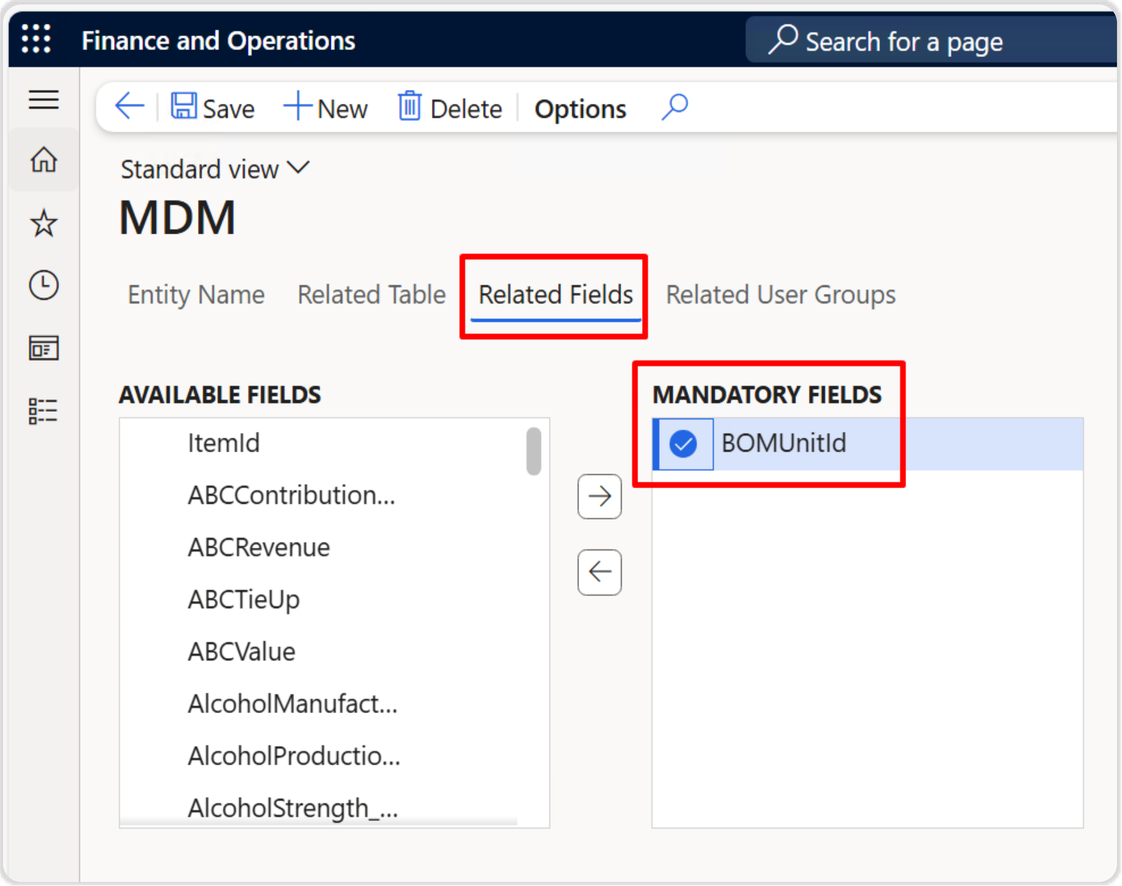
- On the MDM policy setup, let's mandate the fields "Unit" of Purchase and Sell, and the BOM unit ID on the Engineer tab, for that on the "Related Table" form, first need to move the tables from Available to Mandatory Tables where this field is available. (Invent Table For Engineer tab BOM Unit field,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





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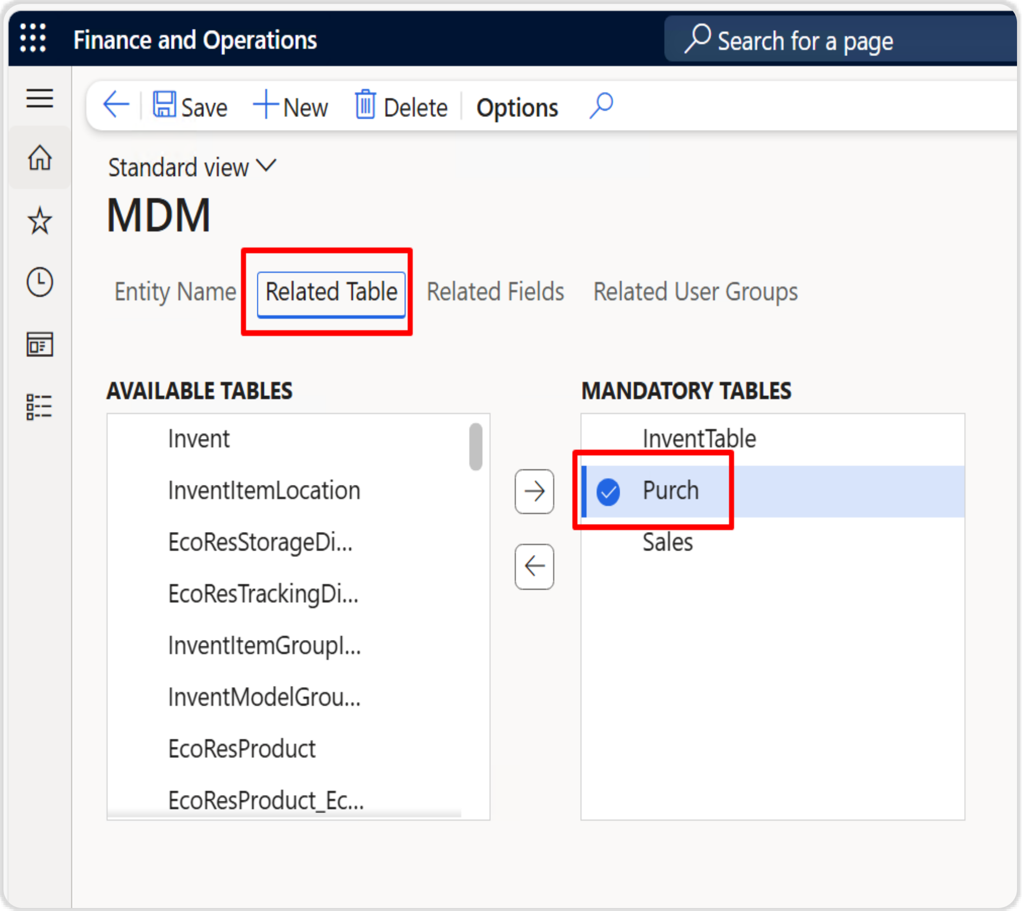
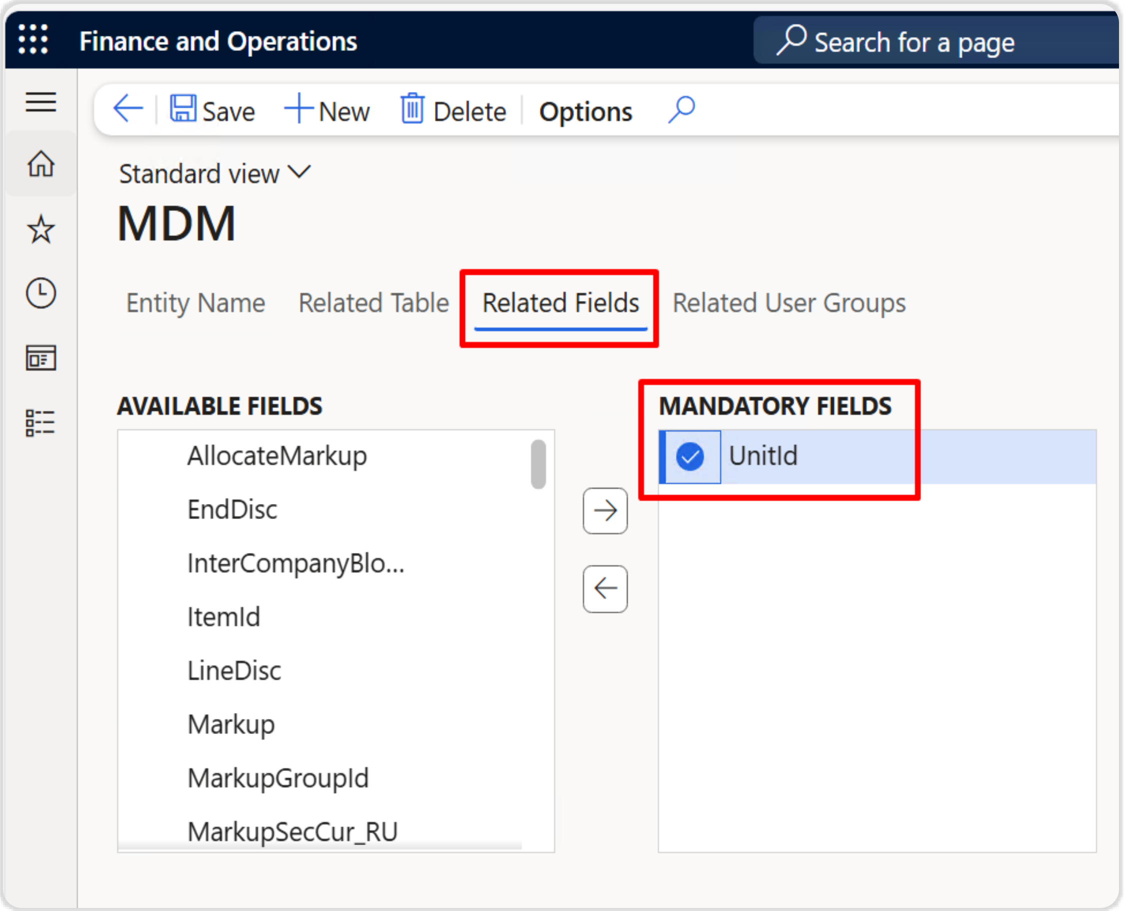
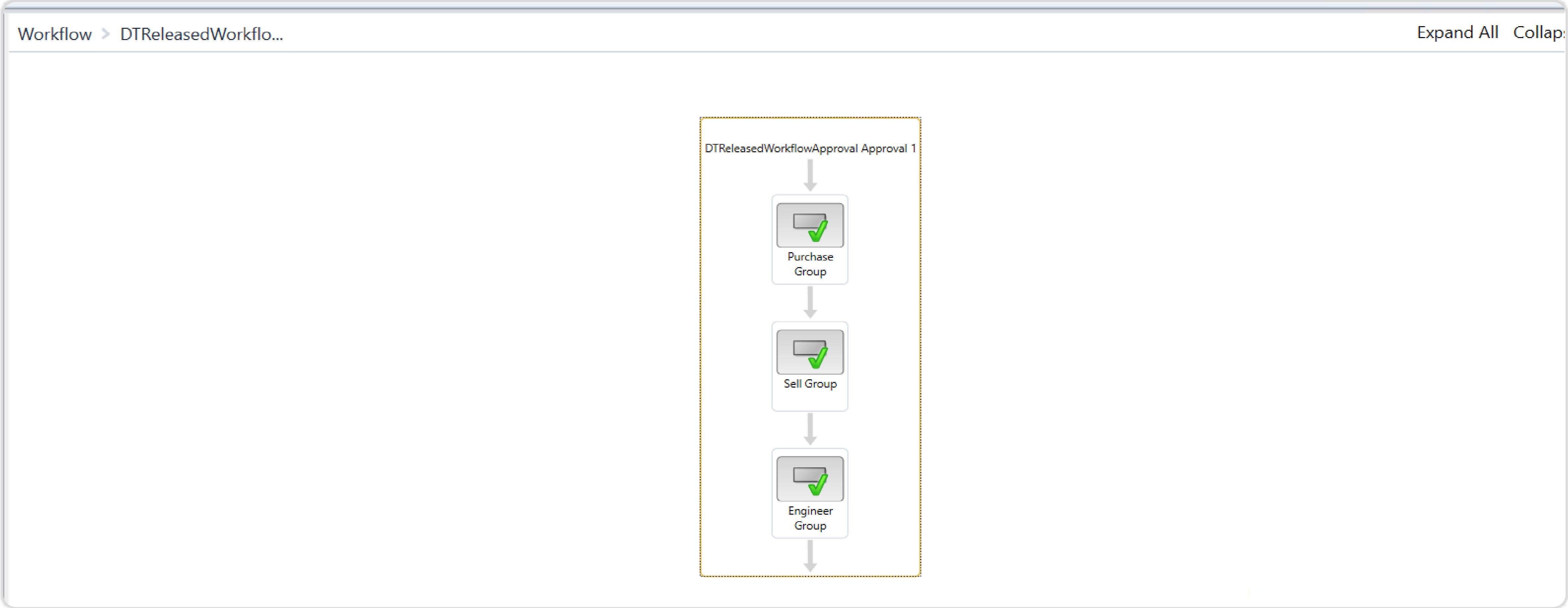
› Same way, now select a Purch table, on the form related table under the Mandatory tables grid, now click on the related fields form and move the field Unit ID from Available to the Mandatory fields grid,

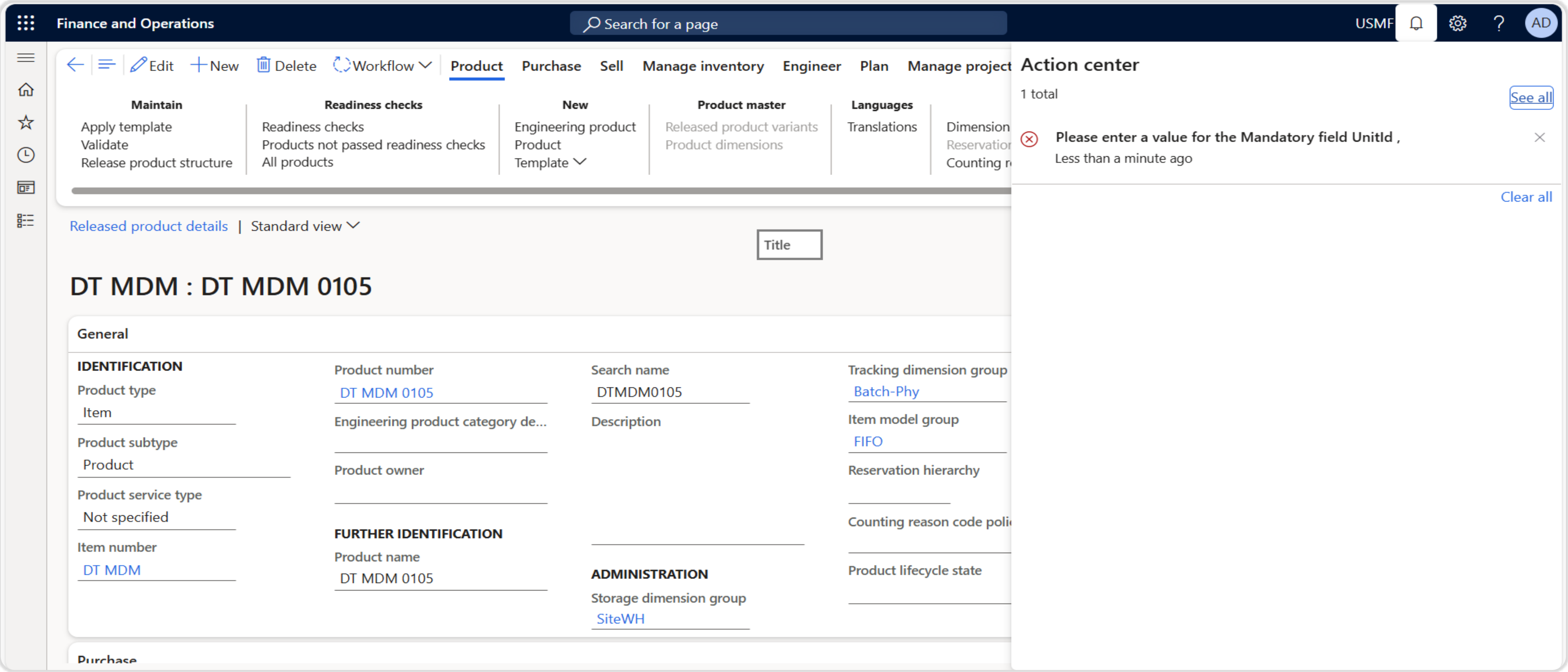




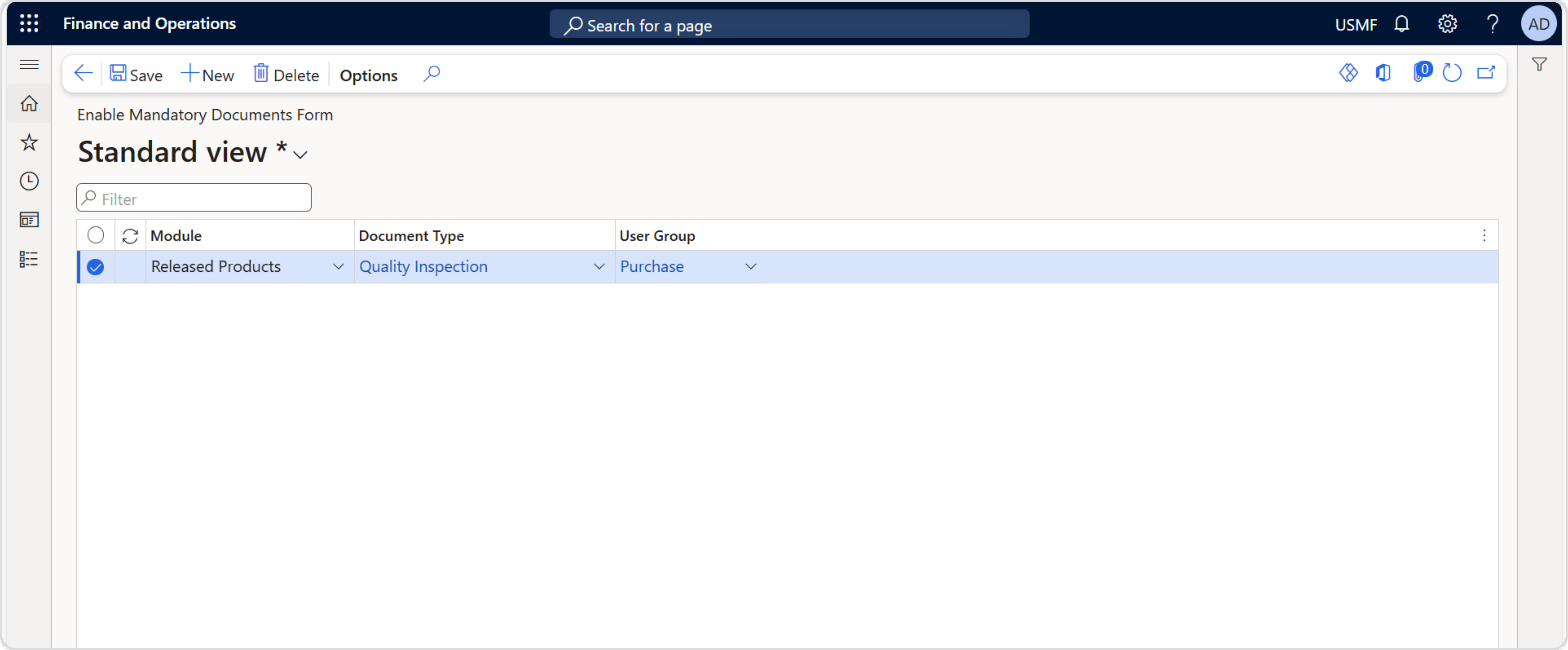
- As we mandate the fields “Unit” of Purchase and Sell, and the BOM unit on the Engineer, the workflow has been set up as if the values in these fields are blank, the assigned user will not be able to approve the workflow, and the system will notify the user, as per the hierarchy the first approval goes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



- 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.



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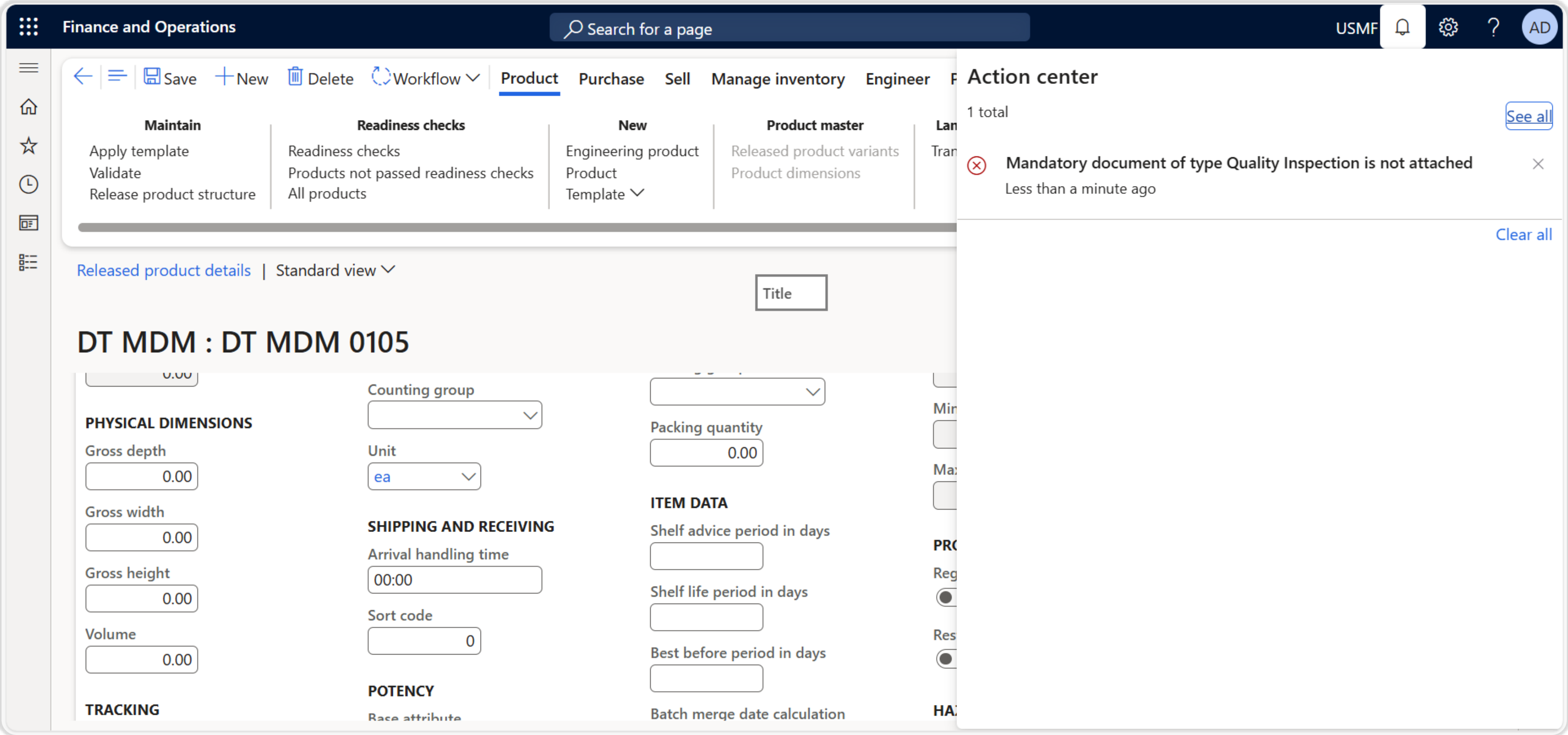
- Since mandatory documents have been enforced, if any required document is missing when the user attempts to approve the workflow, an error notification will be displayed to alert the user.



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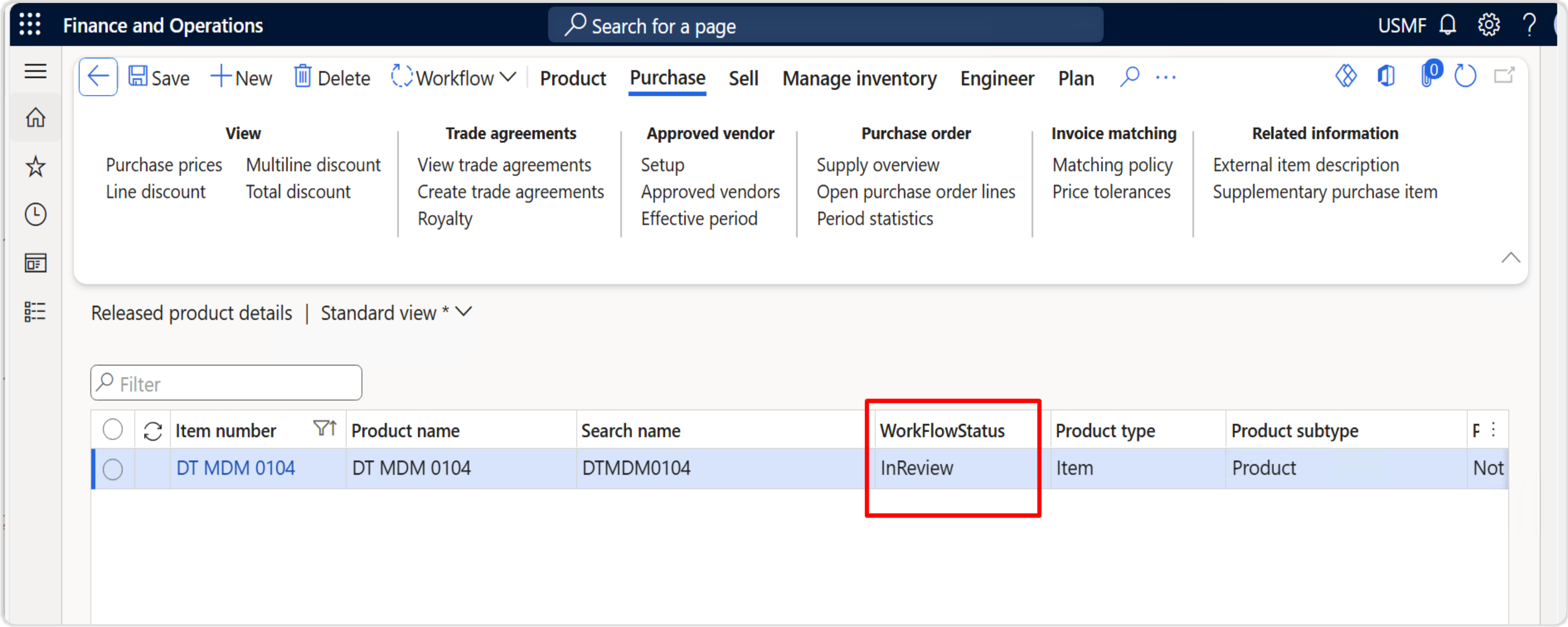
- If the workflow status is in Draft or in-review, the item will not be visible in the different forms. It will be visible as soon as all the assigned users have approved the workflow.



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

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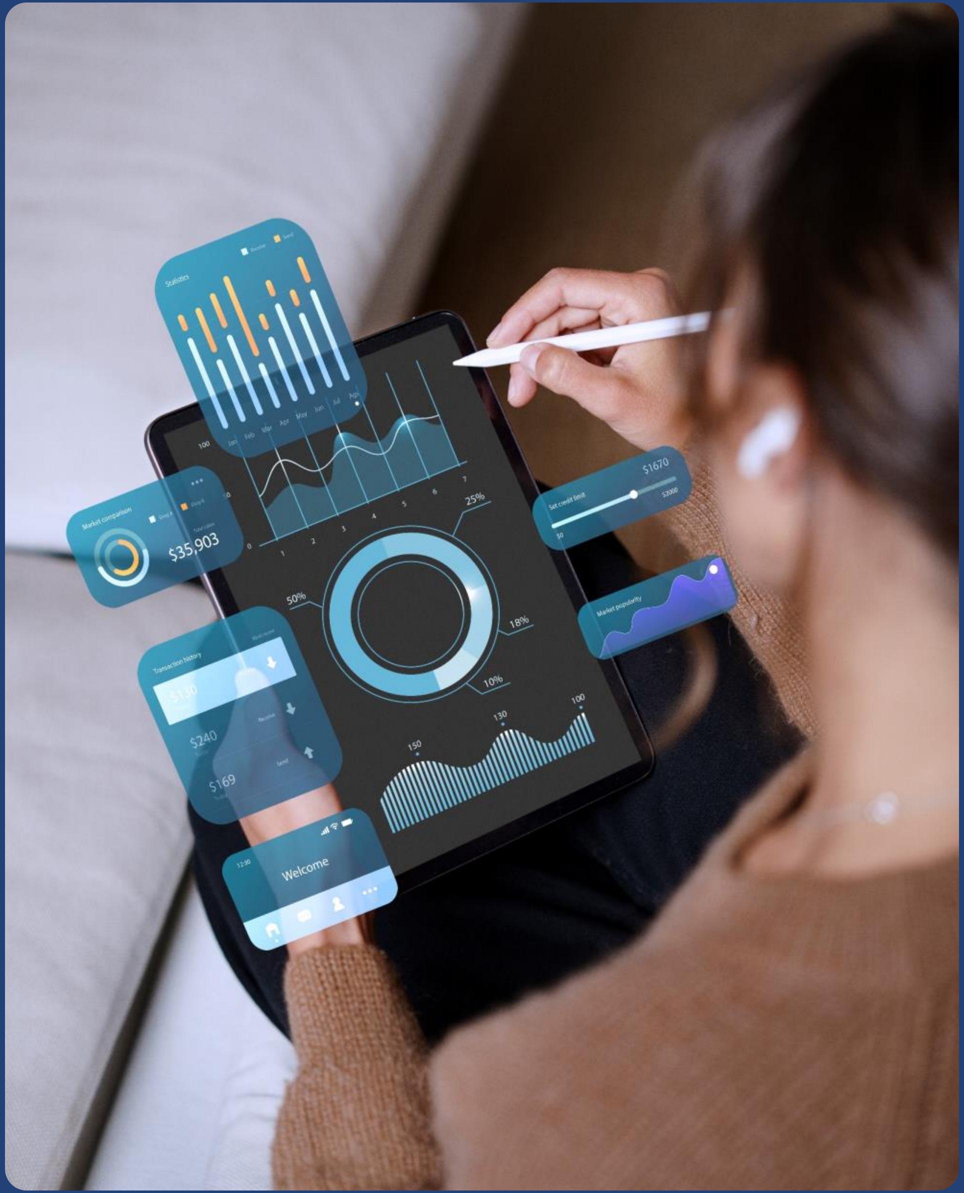
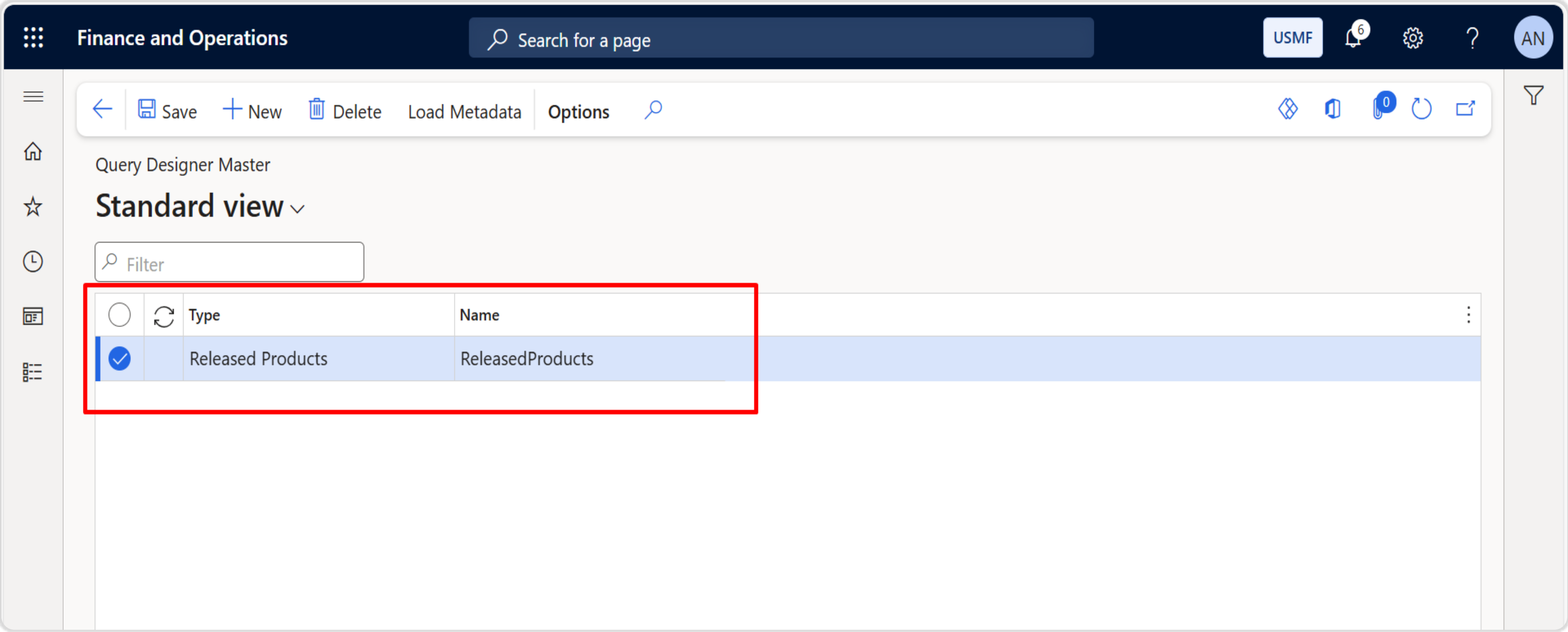
Master Data Management

Query Engine



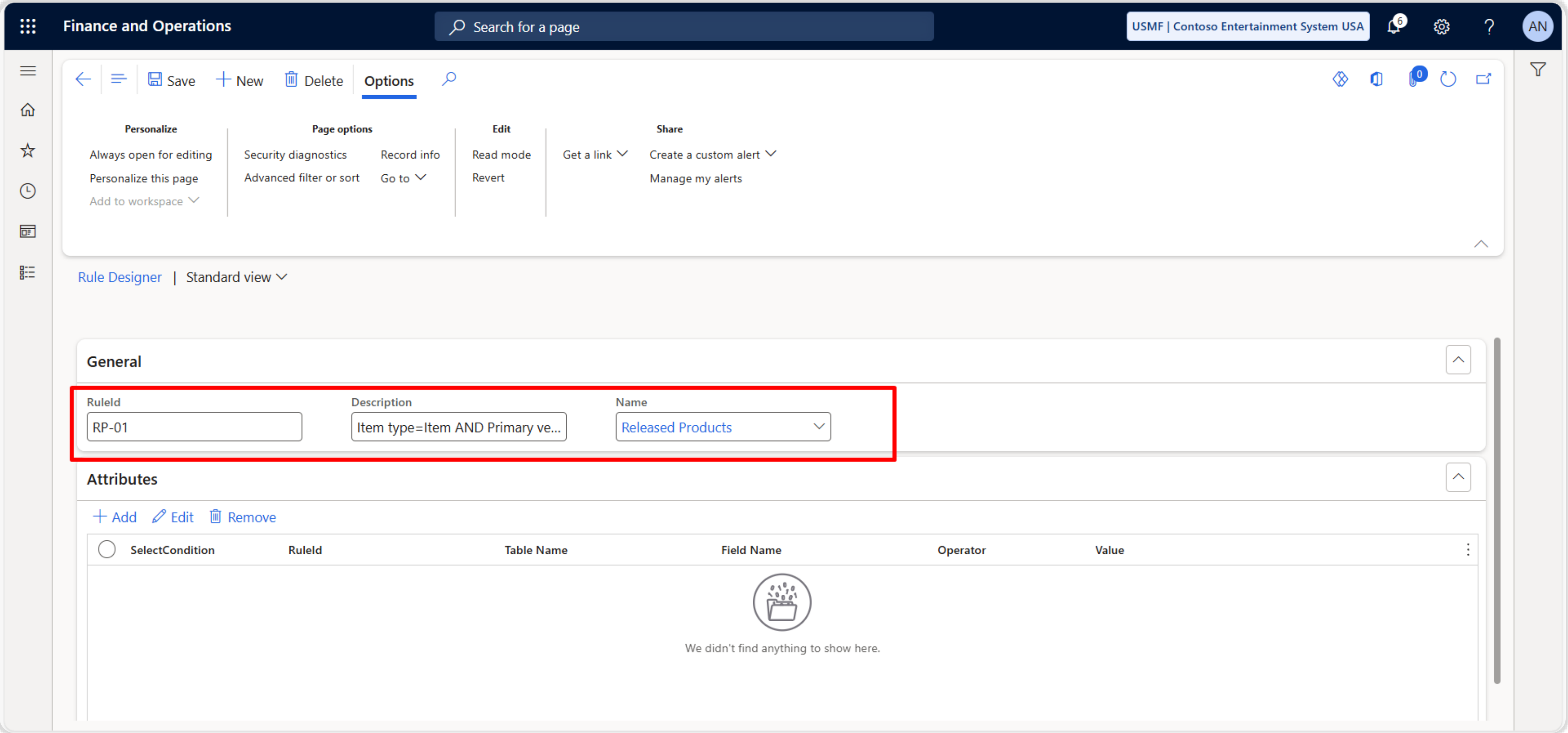
Query Designer Master

- 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."



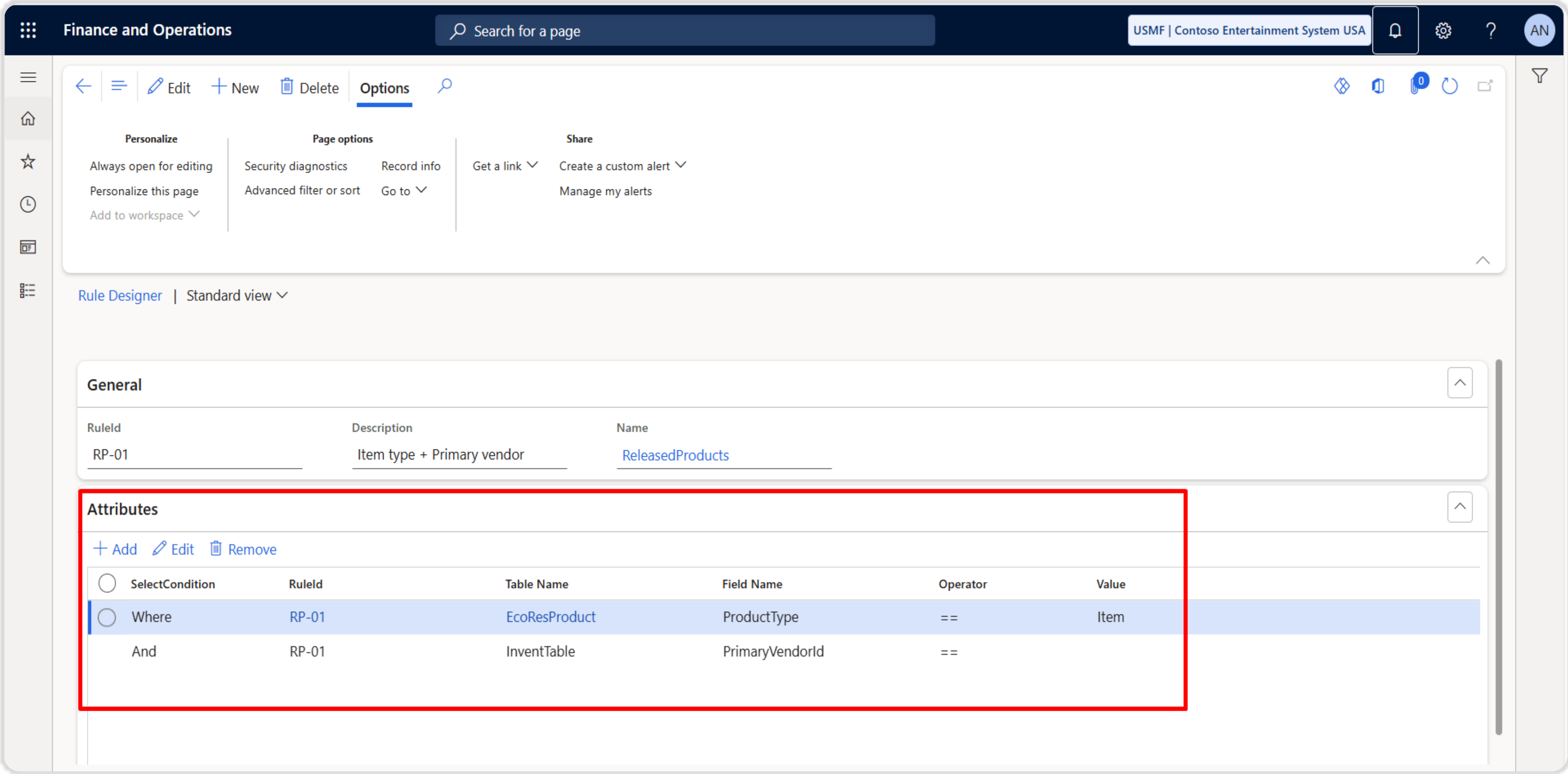
Rule Designer

› 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.



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.



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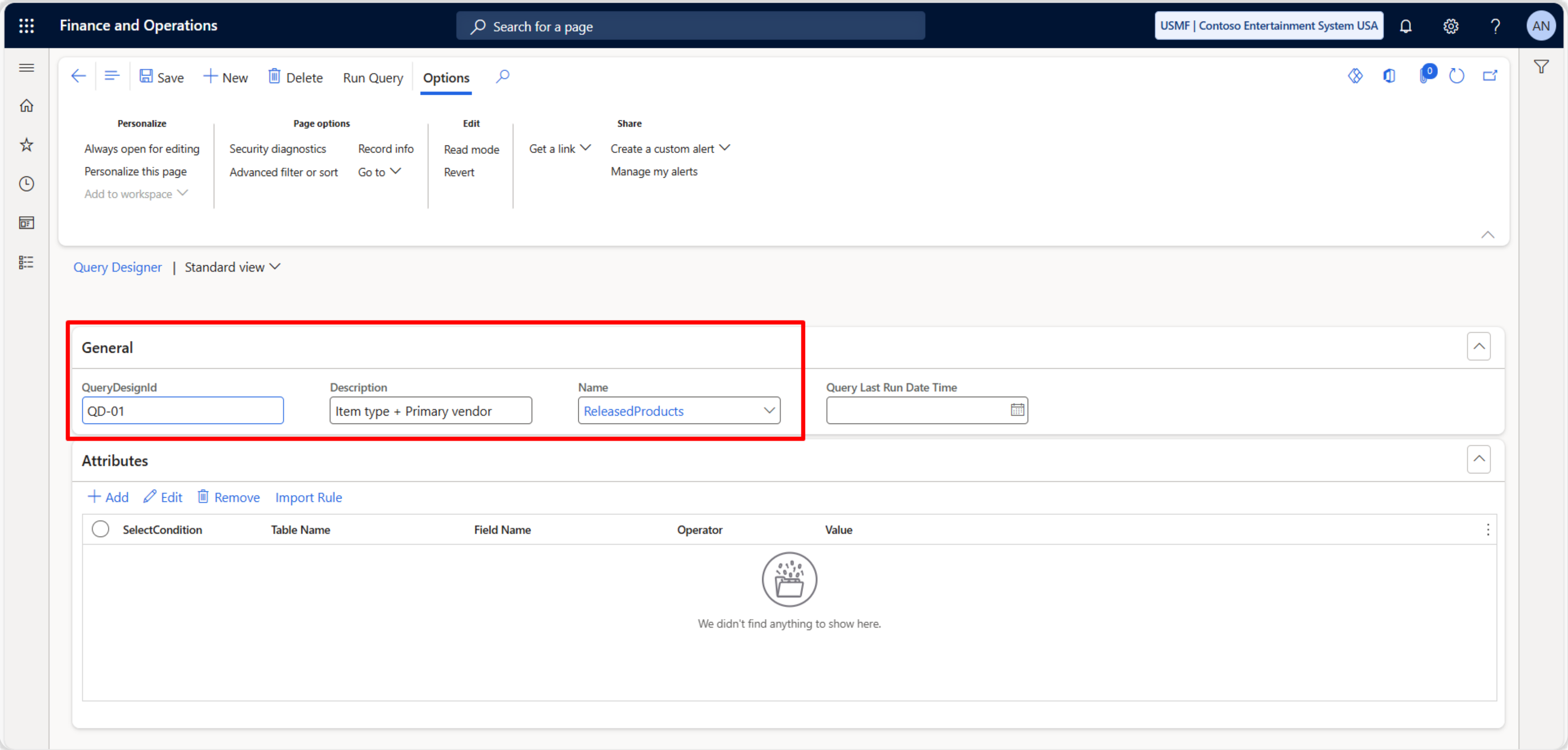
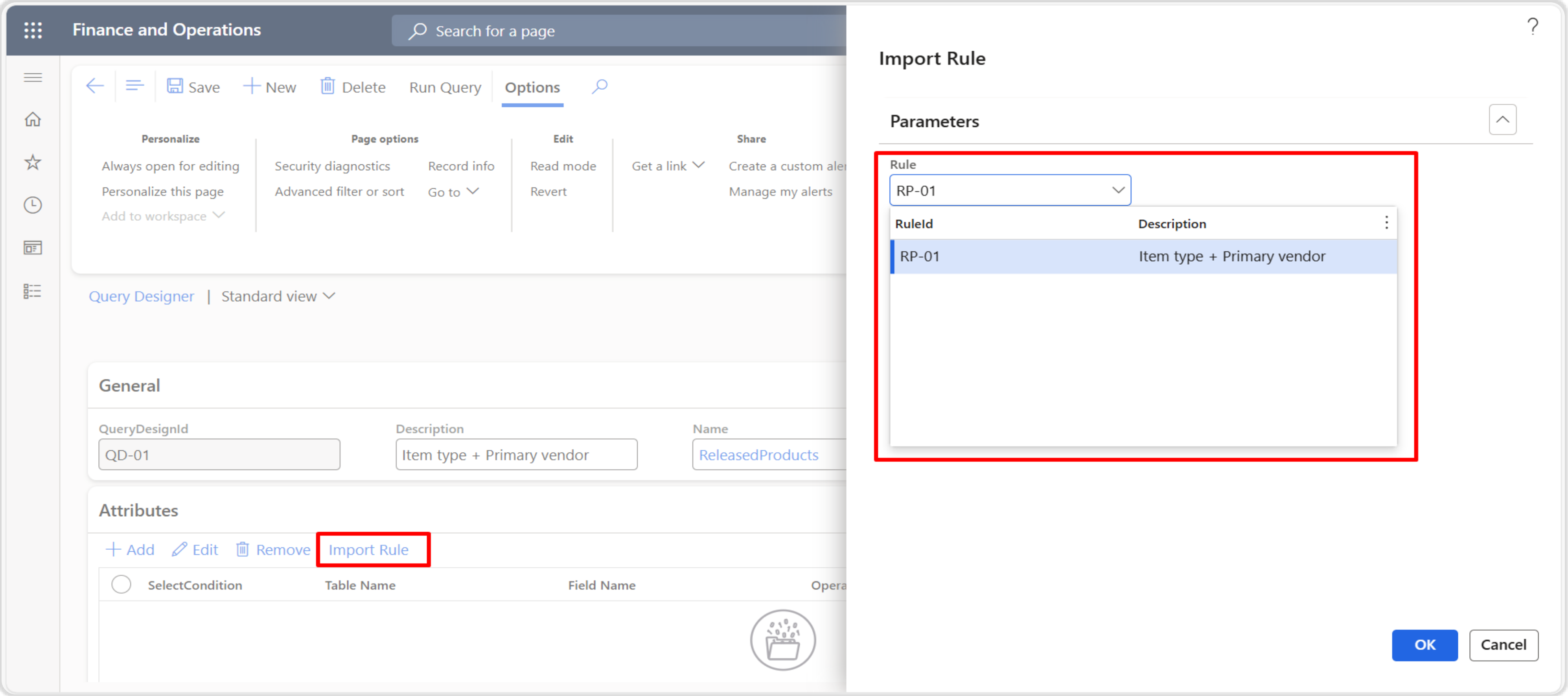
Query Designer

- 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'.



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.



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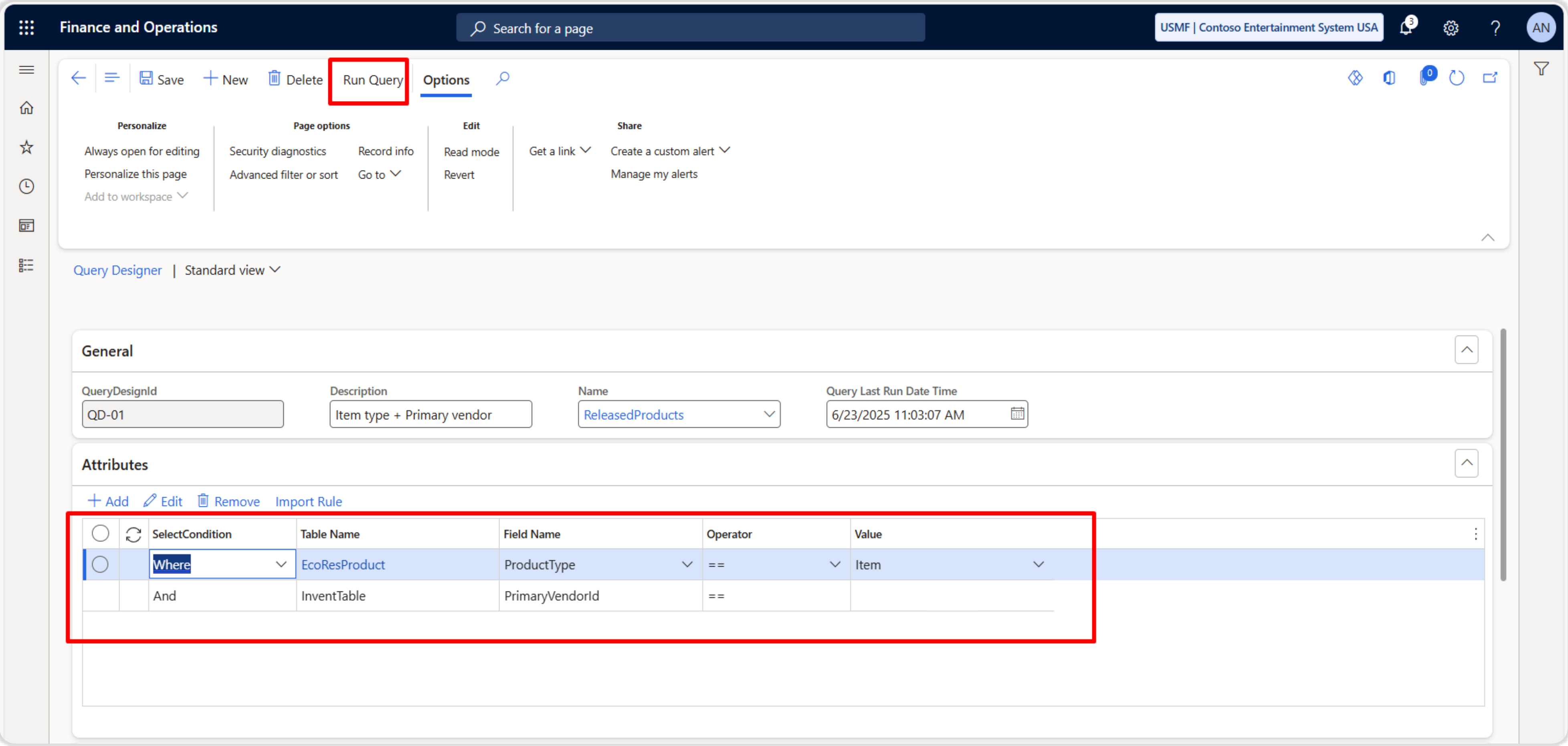
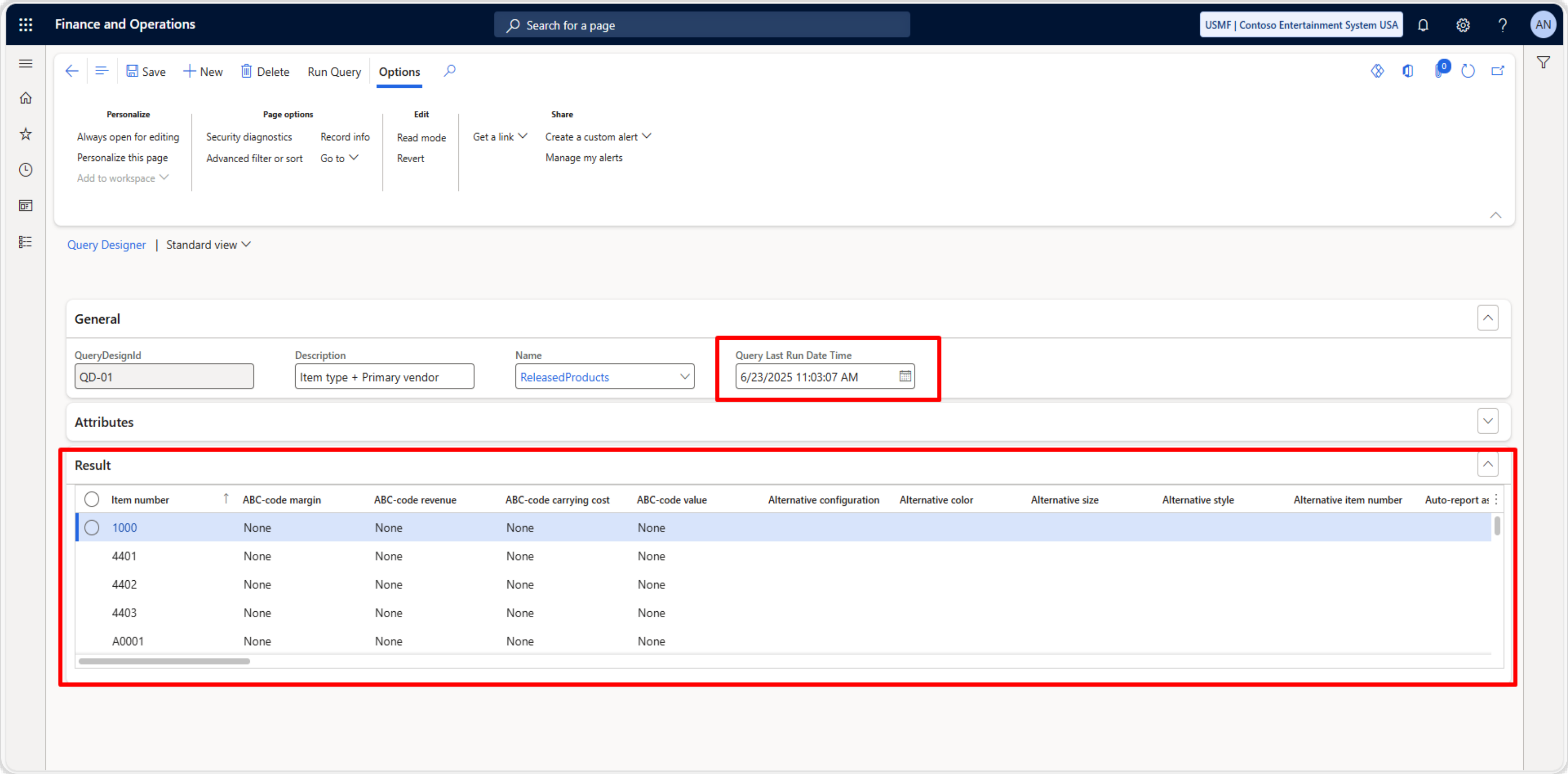
Query Designer

- 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.



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.



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

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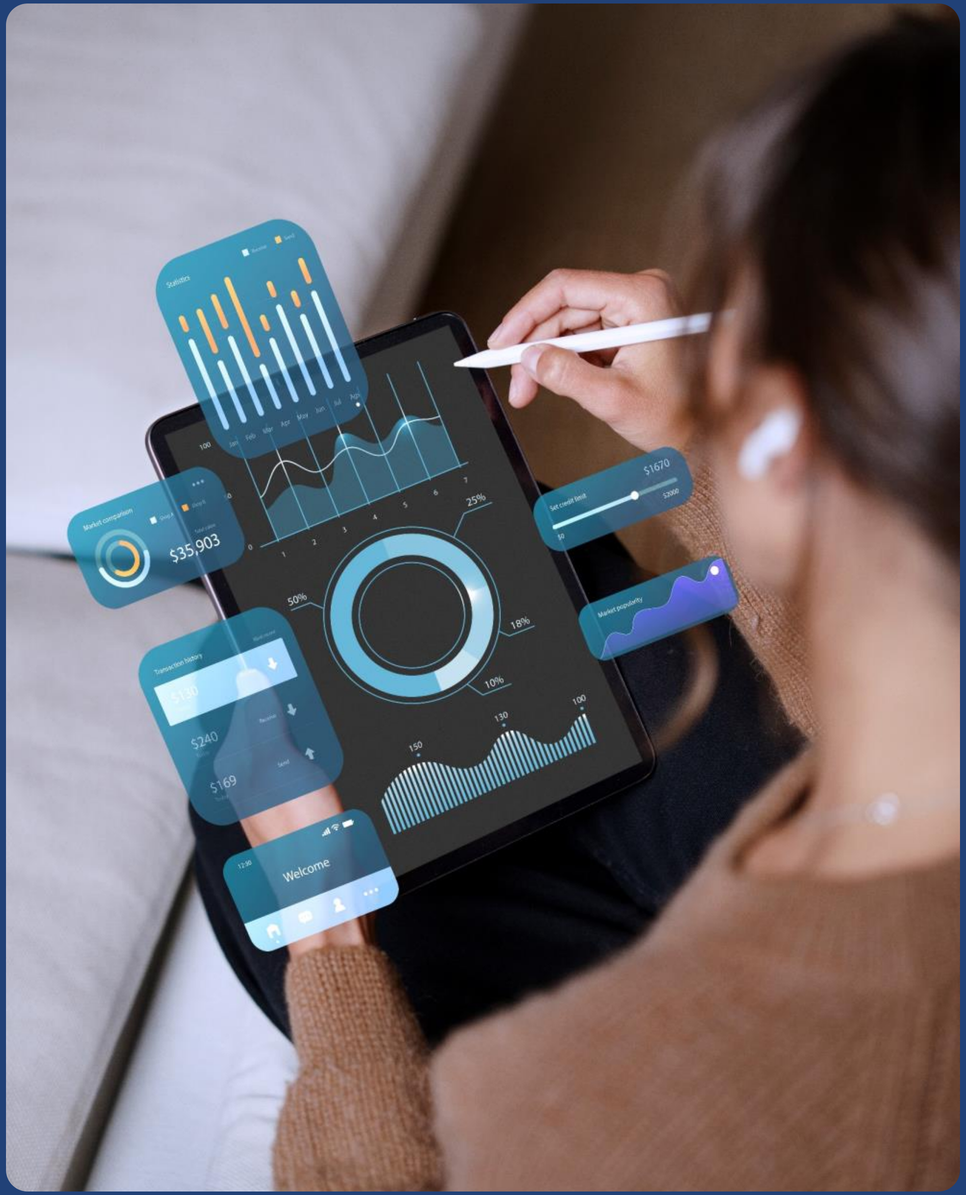
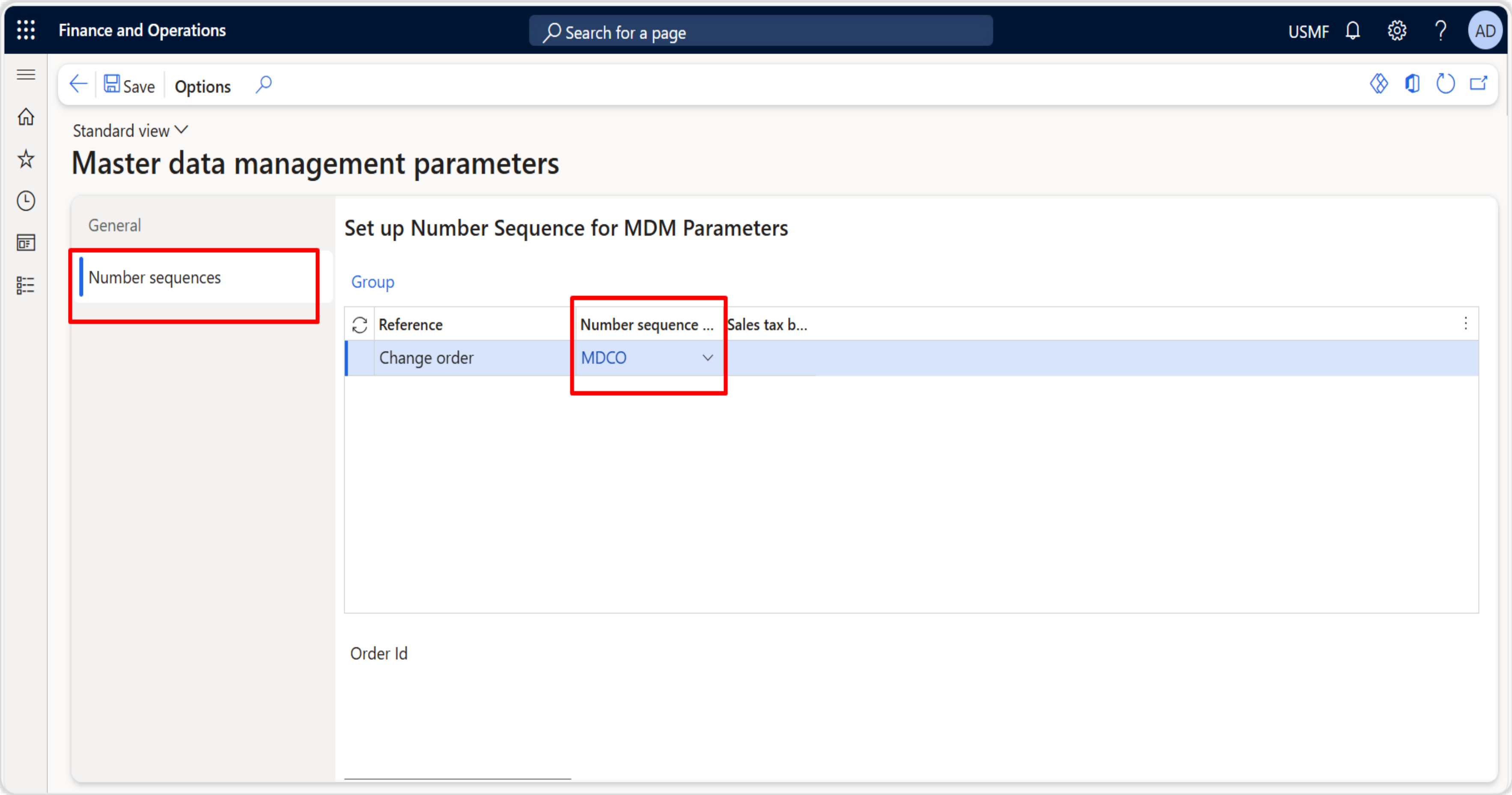
Master Data Management

Master Data Change Order



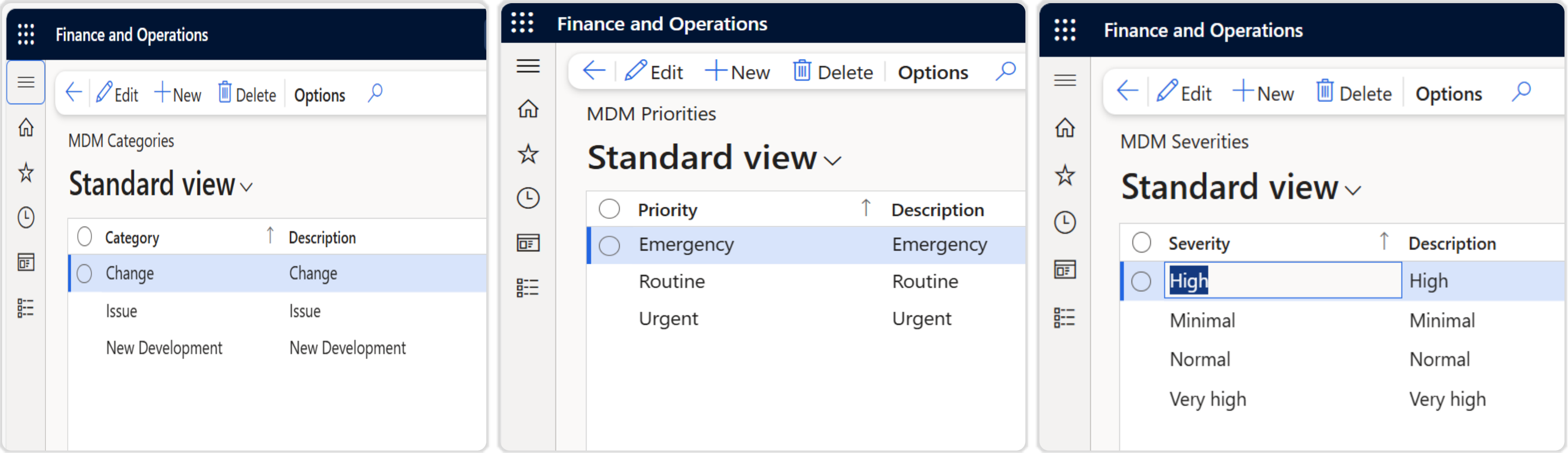
Number Sequence

› 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.



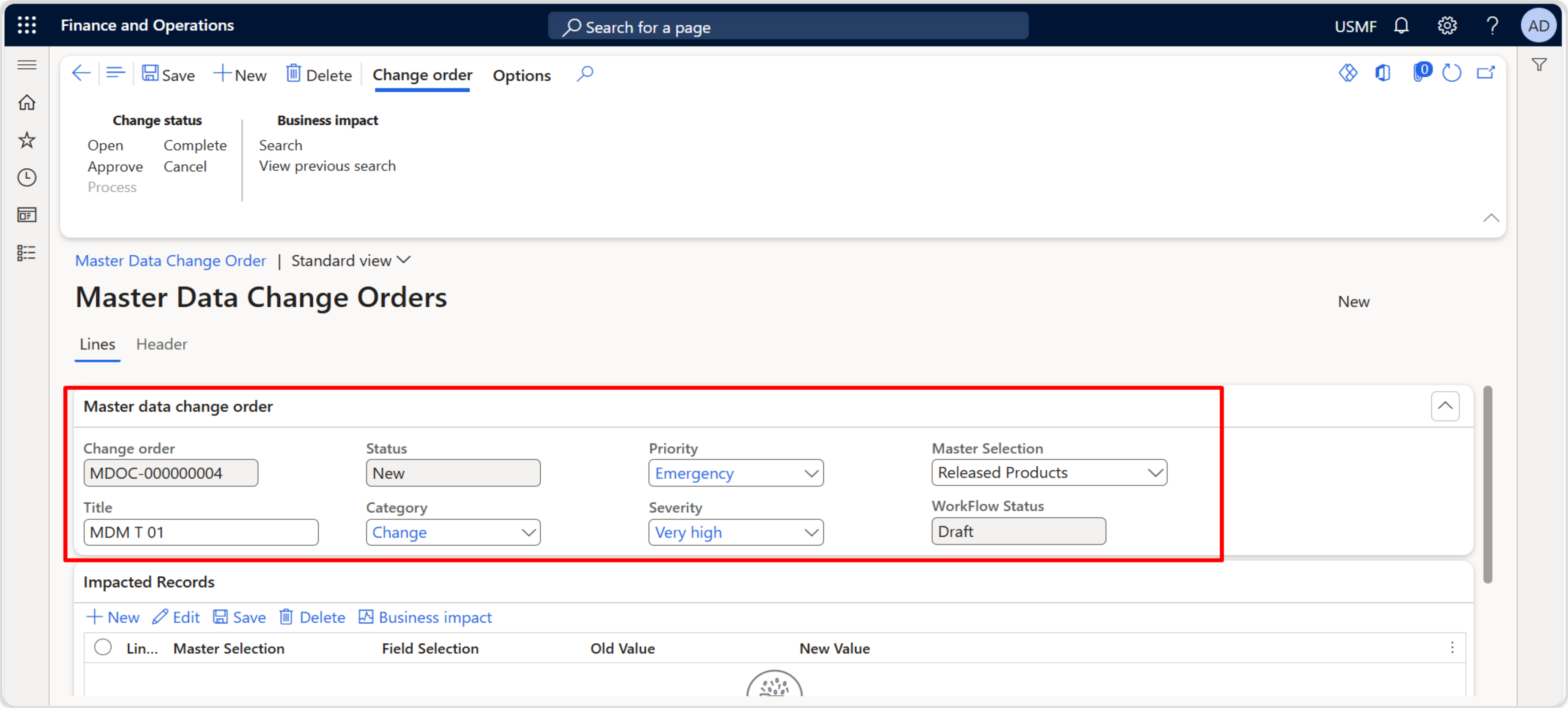
MDM Master

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



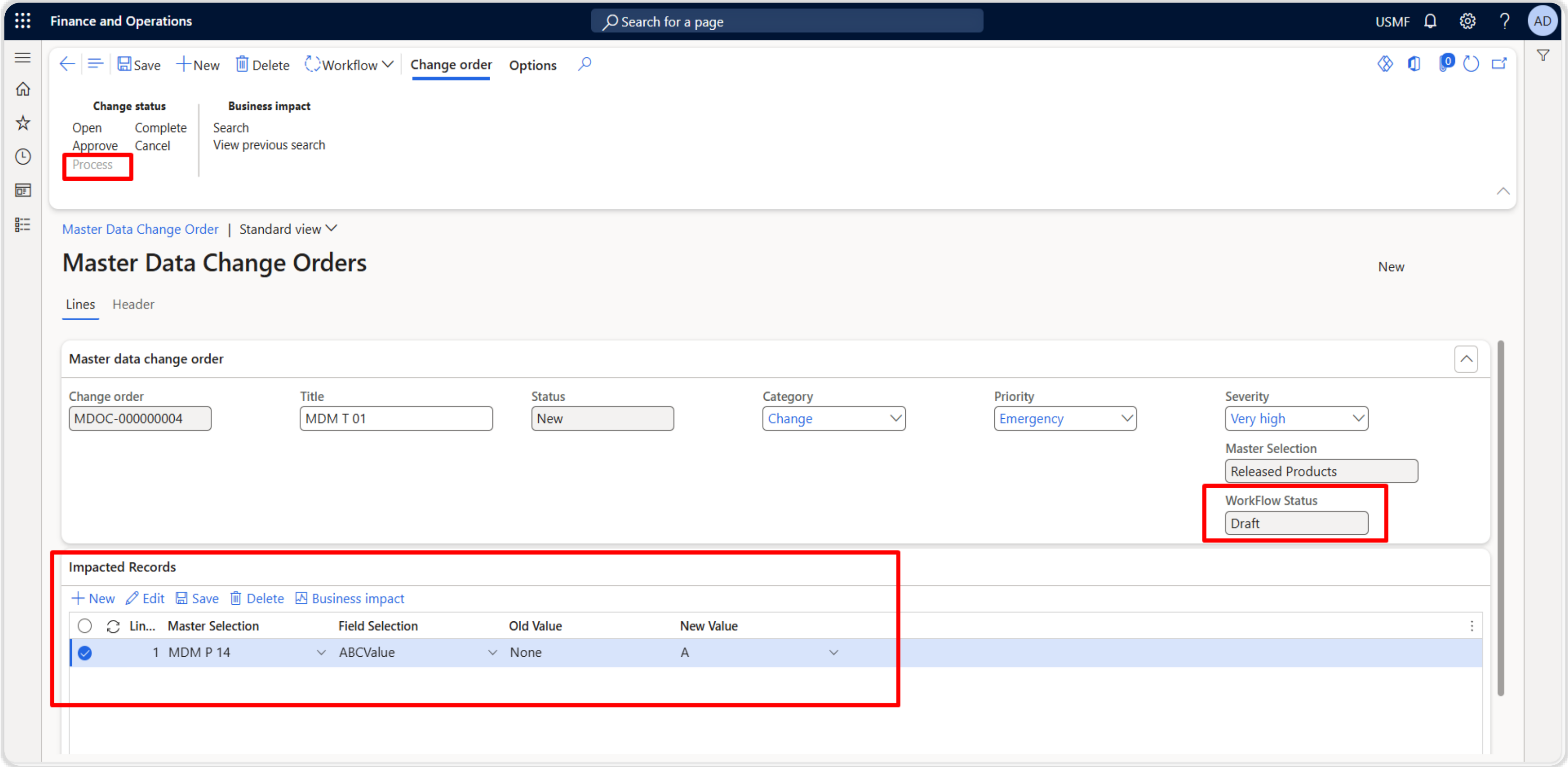
Master Data Change Order

› 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.



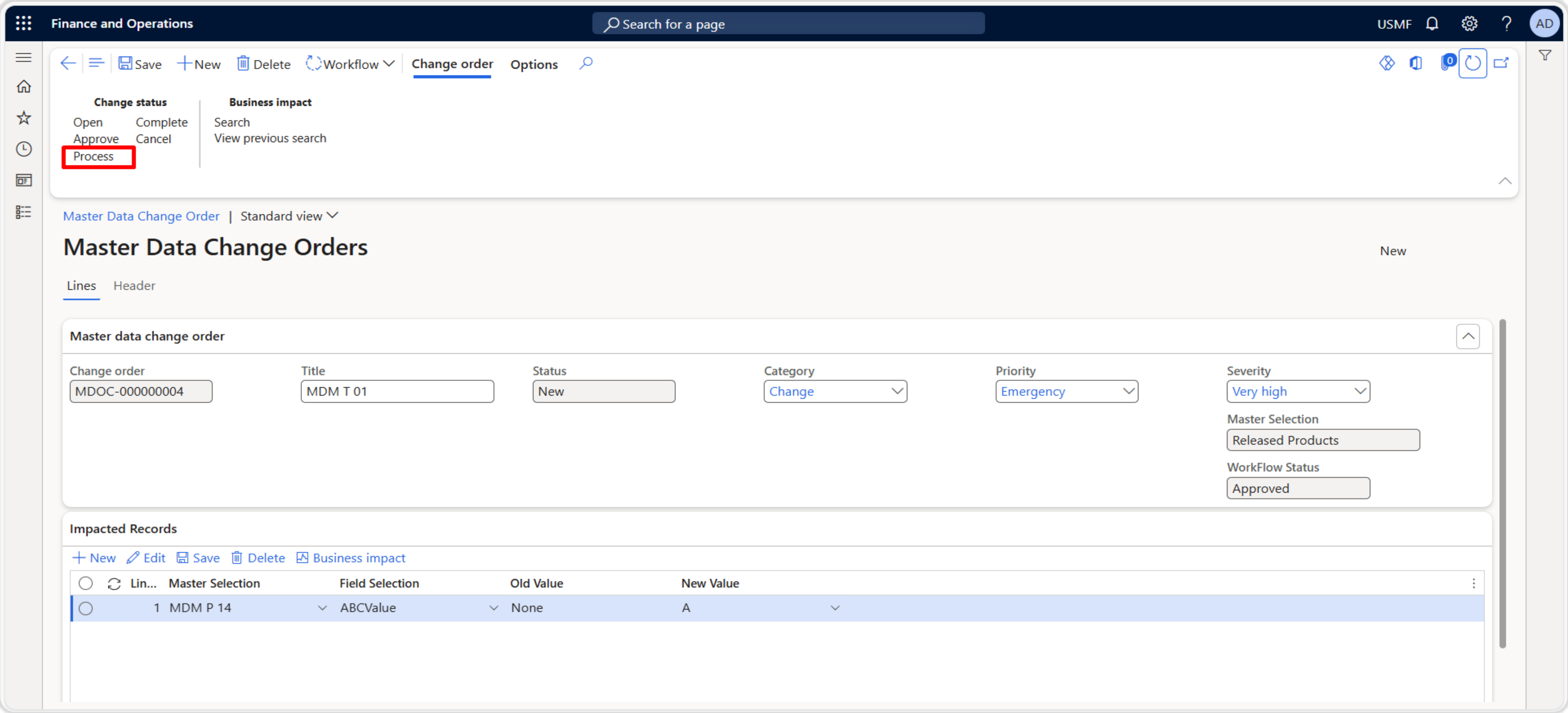
Master Data Change Order

› "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.



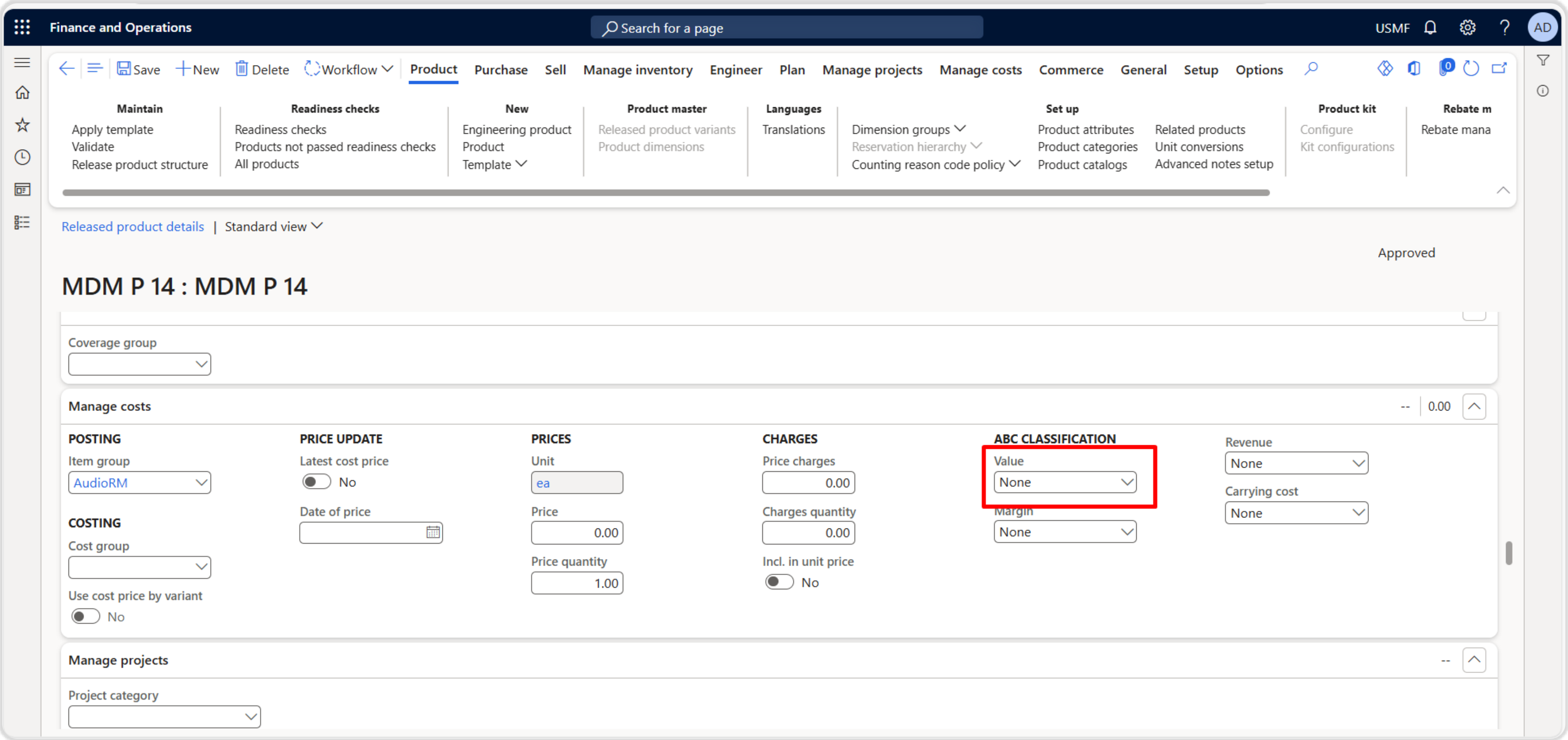
Master Data Change Order

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



Master Data Change Order

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



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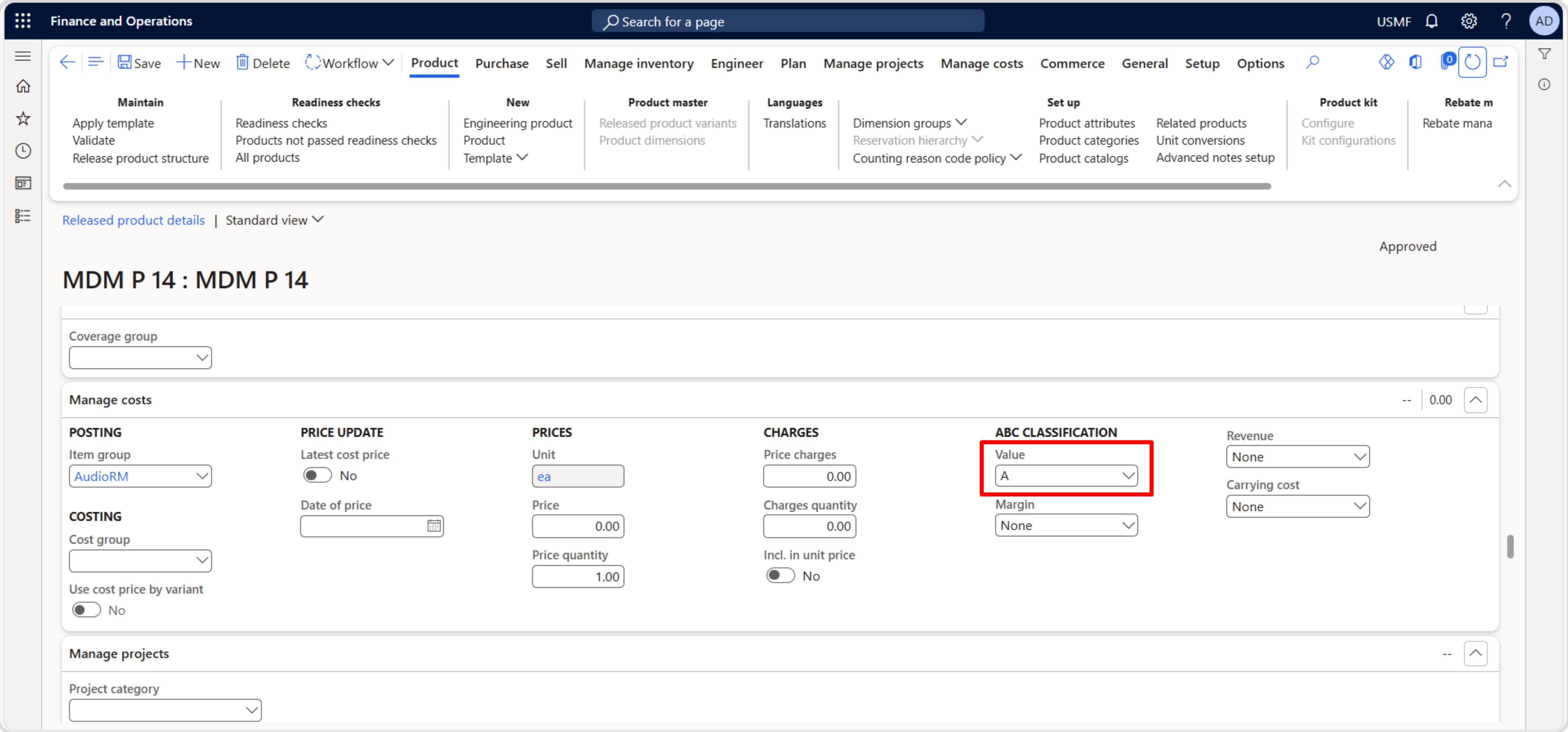
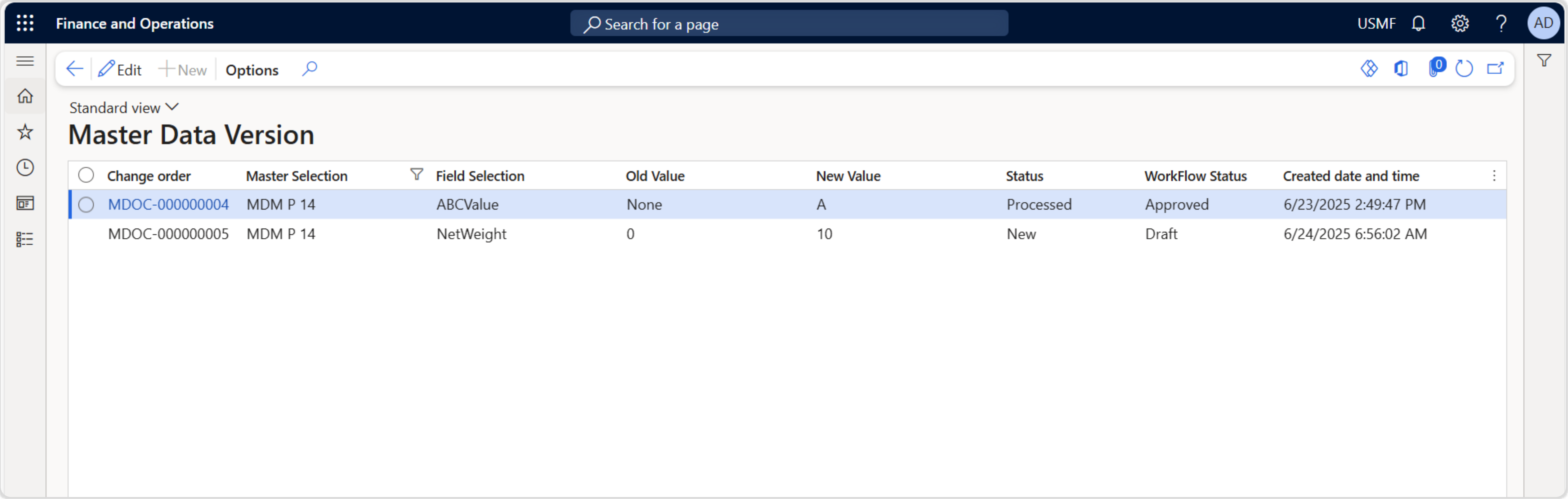
Master Data Change Order

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



Master Data Version

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



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