



 **DynaTech** | Systems

Accelerate Business

What Sets Us Apart

DynaTech's Competitive Advantage

DynaTech is an **AI-first IT consulting and Microsoft AI Cloud partner**, helping organizations reimagine how they operate through intelligent, cloud-native **business applications**.

We design, implement, and support business application platforms that enable core enterprise operations, decision-making, and digital transformation. Our work focuses on embedding AI, automation, and analytics into business processes to drive efficiency, insight, and scalable growth.

By combining **business applications, AI enablement, cloud, data, and automation**, we help organizations move toward intelligent, insight-driven operations with long-term sustainability—going beyond implementation to deliver real business outcomes.



150+

Global Projects

100+















Happy Clients

450+



Expert Minds

Microsoft Cloud Capabilities













Artificial Intelligence (AI)

 Copilot	 Microsoft Foundry	 Claude	 Azure Open AI	 MCP Server	 Cursor AI	 Blackbox AI
 GitHub Copilot	 Work IQ	 Fabric IQ	 Foundry IQ	 Microsoft Visual Studio	 Copilot Studio	 AI Studio















Data & BI

 Fabric	 Power BI	 Data Science	 Data Warehouse	 Data Factory	 OneLake	 Databases
 Data Lake	 Lakehouse	 Microsoft Purview	 Dataverse	 Real-Time Intelligence	 Data Engineering	

Business Applications

 Marketing	 Sales	 Finance	 SCM	 Commerce	 Dataverse
 Customer Service	 Field Service	 Finance & Operations	 Project Operations	 Human Resources	 Customer Insights

Microsoft Cloud & Low Code

 Azure Infra	 Logic Apps	 Service Bus	 Event Grid	 API Management	 Synapse Analytics	 Load Testing
 Functions	 Data Factory	 Power Pages	 Power Automate	 Power Apps	 AI Builder	 Azure FHIR

Master Data Management



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.



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. 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. Intelligent Approval Routing

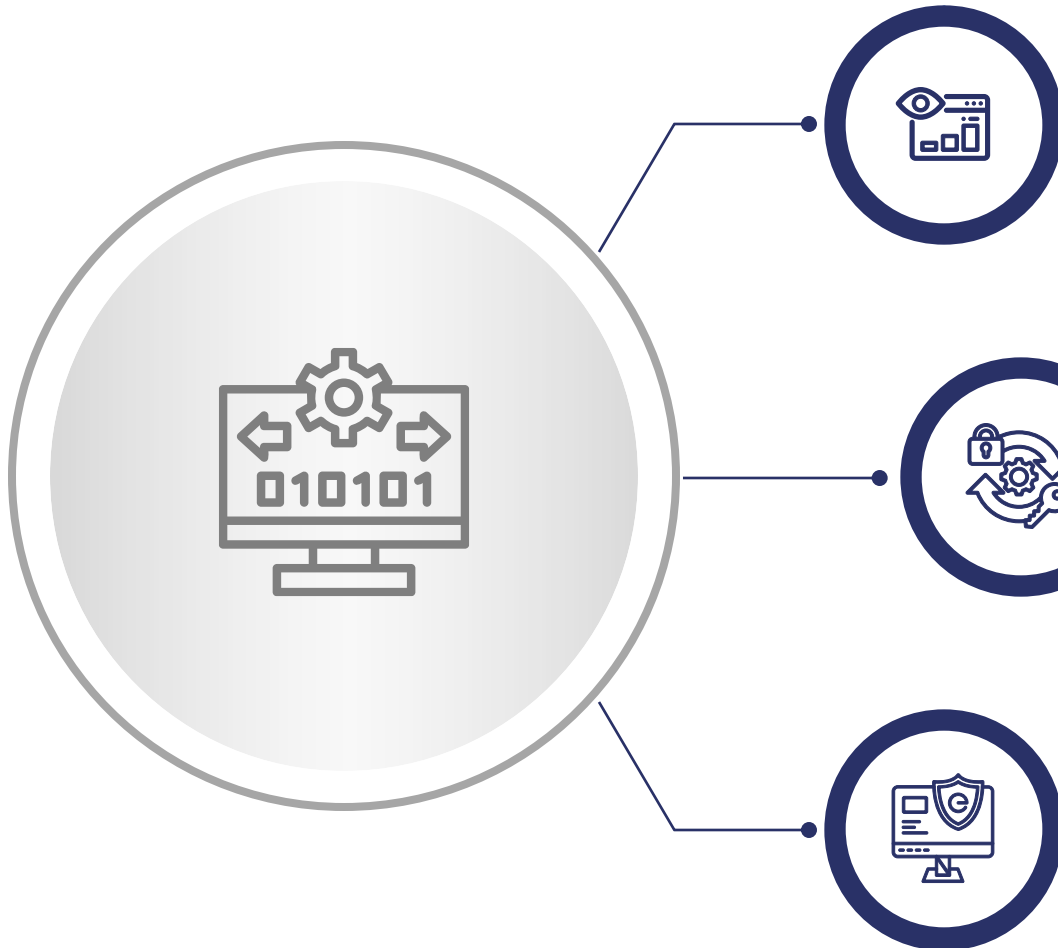
Drive efficiency and compliance with dynamic approval workflows tailored to the nature and risk profile of the requested change. Automatically route requests to the appropriate stakeholders or specialized data steward groups based on predefined rules.

04. 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

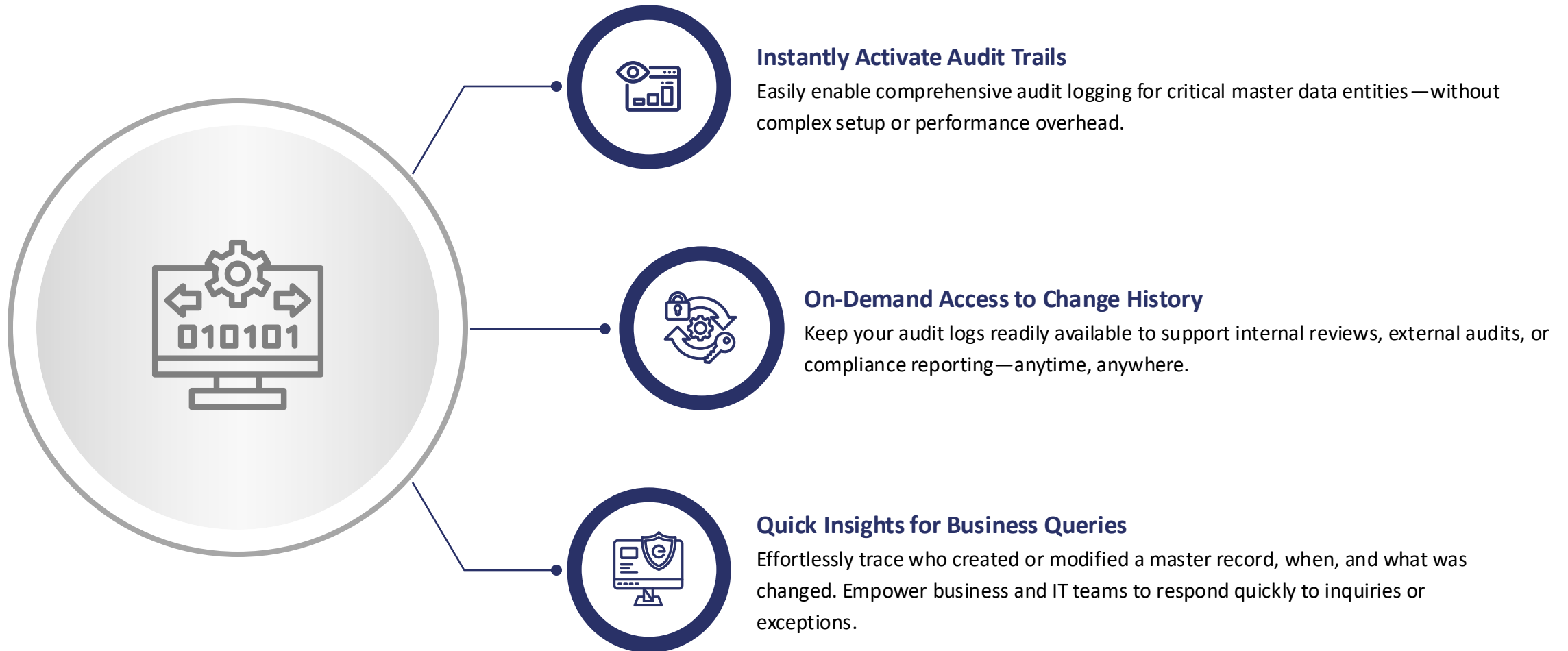
Apply role-based security to ensure that users only have the access they need—nothing more. Limit sensitive operations like bulk updates to authorized power users or data governance teams.

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.



Finance and Operations

Master data setup

Standard view * ▾

Filter

<input type="radio"/>	Form Name	Menu item name	Menu item type
<input checked="" type="checkbox"/>	Item - Release product	EcoResProductDetailsExtendedGrid	Display
<input type="checkbox"/>	Item Journal	InventJournalTableProject	Display
<input type="checkbox"/>	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
<input type="radio"/> 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
<input type="radio"/> aarushi.shah.ext	Aarushi Shah	Global Process Improve...	Romania	aarushi.shah...	ENVU_View_Only		ENVU_Duty_View_Only	ENVU_Privilege_View_Only	Menu item
<input type="radio"/> 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
<input type="radio"/> 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
<input type="radio"/> 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
<input type="radio"/> 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
<input type="radio"/> aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Purchasing agent		Maintain approved vendors	View Released products	Menu item
<input type="radio"/> aashima.goel.ext	Aashima Goel	Chief Procurement Officer	Belgium	aashima.goe...	Purchasing agent		Maintain product prices and discount master	View Released products	Menu item
<input type="radio"/> 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
<input type="radio"/> 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
<input type="radio"/> 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
<input type="radio"/> 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
<input type="radio"/> 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
<input type="radio"/> abhijit.baruah	Abhijit Baruah	Key Acct Mgr	China	abhijit.barua...	Envu_SalesAndMarketing_In...		Inquire into sales return order progress	View Released products	Menu item
<input type="radio"/> 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
<input type="radio"/> achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Maintain warehouse operation master	View Released products	Menu item
<input type="radio"/> achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into warehouse operation master	View Released products	Menu item
<input type="radio"/> achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into RFID/barcode master	View Released products	Menu item
<input type="radio"/> achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Warehouse manager		Inquire into products for operations master	View Released products	Menu item
<input type="radio"/> achraf.amadide	Achraf Amadide	Data Science & Analytics...	Germany	achraf.amad...	Inventory accountant clerk		Maintain BOM calculation master	View Released products	Menu item

The screenshot shows the 'User security configuration' page in Dynamics 365 Finance and Operations. The breadcrumb trail is 'Secure D365 > Security User Trace Details > User security configuration'. The page title is 'Standard View *'. A search filter is present above the table. The table lists various permissions for the resource 'View Released products'.

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.

The screenshot displays the 'Enable Logs' configuration page in Dynamics 365 Finance and Operations. The interface includes a navigation bar with 'Save', 'Enable logs', 'Load Metadata', and 'Options' buttons. The 'Module' is set to 'Customer'. The 'RELATED TABLES' section lists various tables, with 'CustTable' selected. The 'RELATED FIELDS' section shows a list of fields with checkboxes to enable logging for each.

Table name	Field name	Enabled
<input checked="" type="radio"/> CustTable	<input checked="" type="checkbox"/> PaymTermId	<input checked="" type="checkbox"/>
<input type="radio"/> CustTableTmpFilter	<input checked="" type="checkbox"/> LineDisc	<input checked="" type="checkbox"/>
<input type="radio"/> CustCollectionsContact	<input type="checkbox"/> TaxWithholdGroup_TH	<input type="checkbox"/>
<input type="radio"/> DirPersonName	<input type="checkbox"/> PartyCountry	<input type="checkbox"/>
<input type="radio"/> DirPartyTable	<input type="checkbox"/> AccountNum	<input type="checkbox"/>
<input type="radio"/> DirPartyTable_DirOrganizationBase	<input type="checkbox"/> AccountStatement	<input type="checkbox"/>
<input type="radio"/> DirPartyTable_DirOrganization	<input type="checkbox"/> Affiliated_RU	<input type="checkbox"/>
<input type="radio"/> DirPartyTable_OMInternalOrganization	<input type="checkbox"/> AgencyLocationCode	<input type="checkbox"/>
<input type="radio"/> DirPartyTable_OMOperatingUnit	<input type="checkbox"/> BankAccount	<input type="checkbox"/>
<input type="radio"/> DirPartyTable_CompanyInfo	<input type="checkbox"/> BankCentralBankPurpose...	<input type="checkbox"/>
<input type="radio"/> DirPartyTable_OMTeam	<input type="checkbox"/> BankCentralBankPurposeT...	<input type="checkbox"/>
<input type="radio"/> DirPartyTable_DirPerson	<input type="checkbox"/> BankCustPaymIdTable	<input type="checkbox"/>
<input type="radio"/> mcrMessageAssociation	<input type="checkbox"/> BirthCountyCode_IT	<input type="checkbox"/>
<input type="radio"/> TaxInformationCustTable_IN	<input type="checkbox"/> BirthPlace_IT	<input type="checkbox"/>
<input type="radio"/> RetailCustTable	<input type="checkbox"/> Blocked	<input type="checkbox"/>
<input type="radio"/> CustDirectDebitMandate	<input type="checkbox"/> CashDisc	<input type="checkbox"/>
<input type="radio"/> MCRCustTable	<input type="checkbox"/> CashDiscBaseDays	<input type="checkbox"/>
<input type="radio"/> WHSCustTable	<input type="checkbox"/> CCMNum_BR	<input type="checkbox"/>

Finance and Operations USMF

Search for a page

Save +New Delete Options

Easy Log View

Standard view * v

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 v

Item Name begins with v

Field name begins with v

Old value begins with v

New value begins with v

Created date and time between v

Apply Reset

Master Data Change Order Form

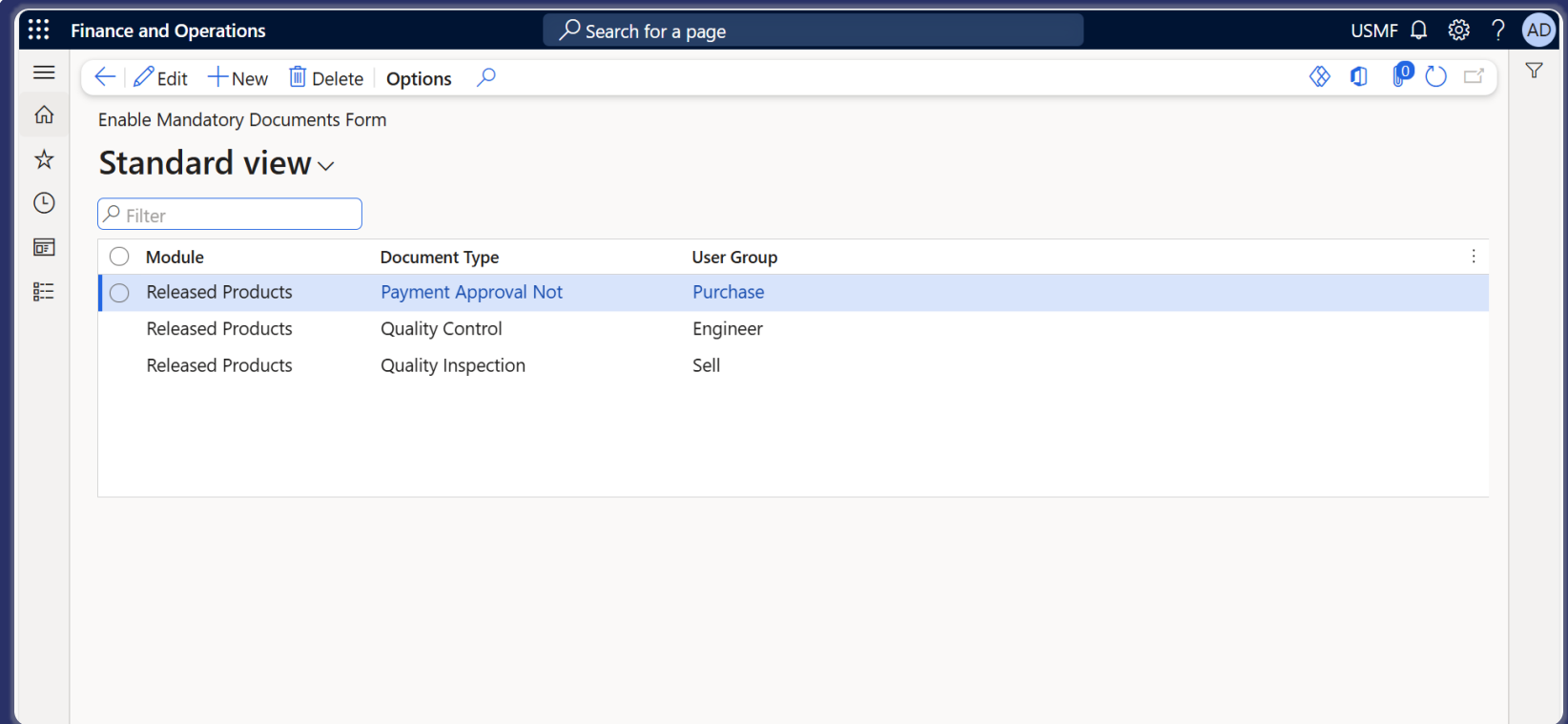
A form used to request, track, and manage changes to key master data records such as items, customers, and vendors, ensuring data accuracy and compliance.

The screenshot displays the 'Master Data Change Order' form in Dynamics 365 Finance and Operations. The form is titled 'Master Data Change Order' and is in 'Standard view'. It includes a 'Change order' field with the value 'MDOC-000000003', a 'Status' field set to 'New', a 'Priority' field set to 'Emergency', and a 'Master Selection' field set to 'Released Products'. Other fields include 'Title' (BI test 01), 'Category' (Change), 'Severity' (High), and 'WorkFlow Status' (Draft). Below the form is a table titled 'Impacted Records' with the following data:

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.



Finance and Operations

Search for a page

USMF

Enable Mandatory Documents Form

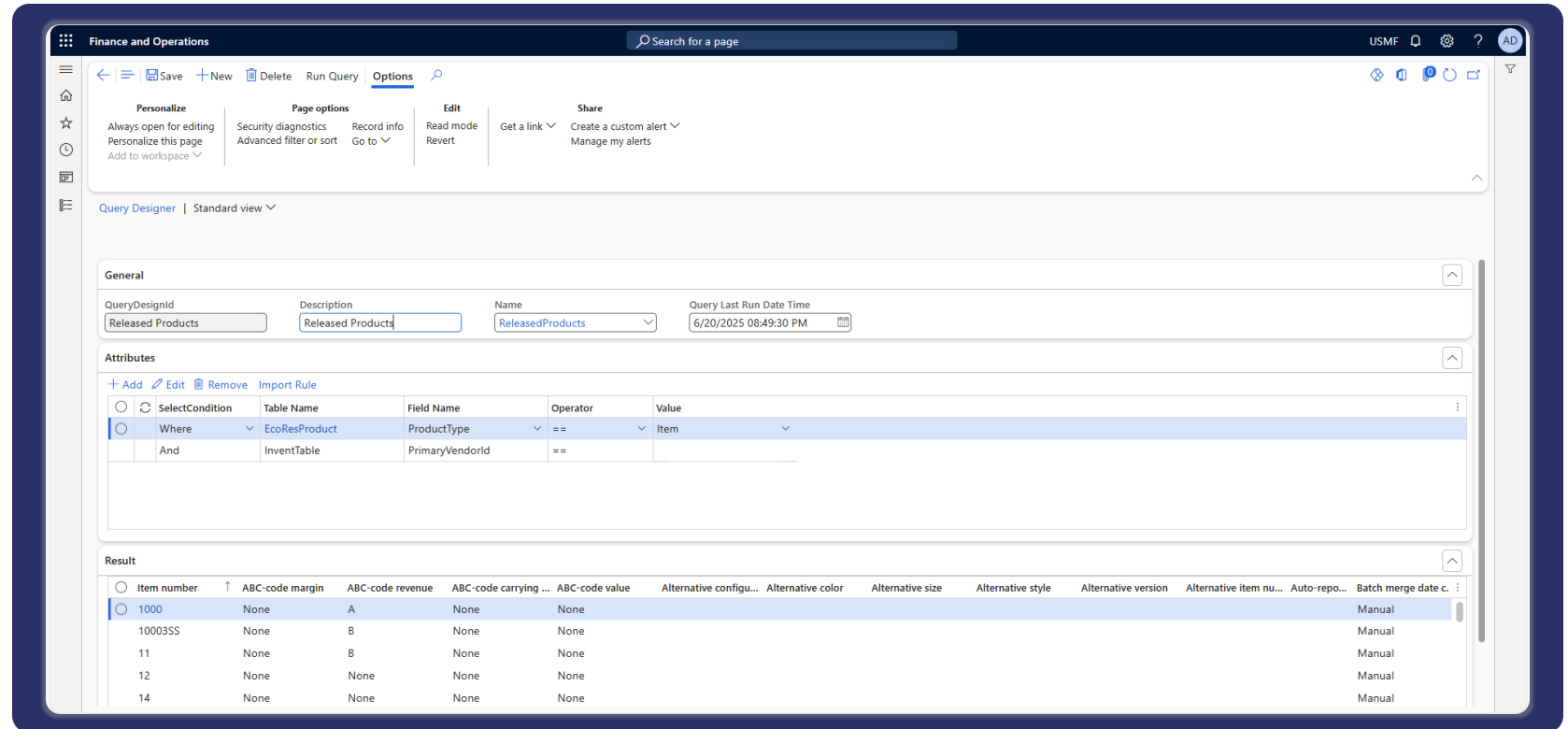
Standard view

Filter

Module	Document Type	User Group
Released Products	Payment Approval Not	Purchase
Released Products	Quality Control	Engineer
Released Products	Quality Inspection	Sell

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

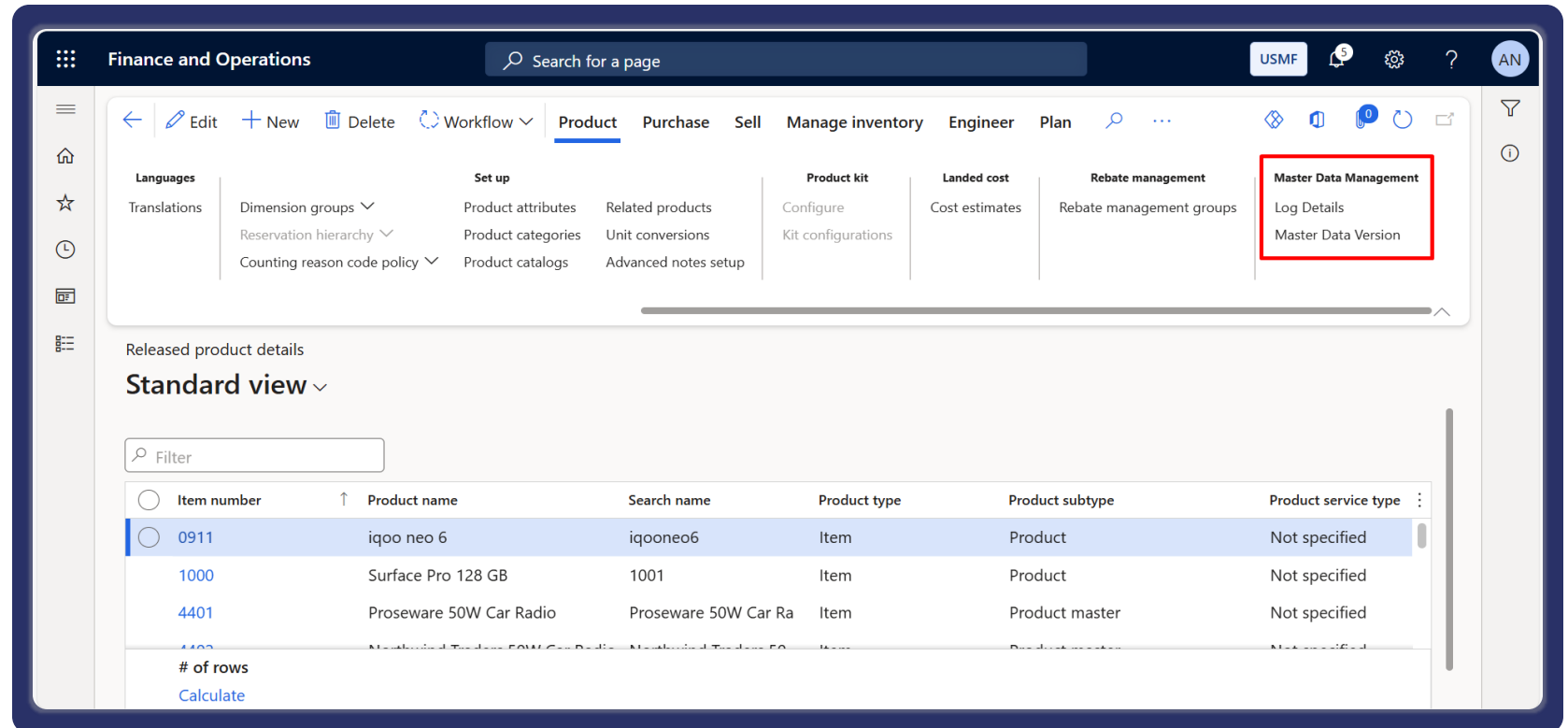
A centralized workspace to initiate, track, and manage workflow approvals for item, customer, and vendor master data changes, ensuring consistency, compliance, and data governance.

The screenshot displays the 'Master Data Management Workflow Workspace' interface. At the top, the navigation bar shows 'Finance and Operations' and a search bar. The page title is 'Options' with a search icon. The main heading is 'Master Data Management Workflow Workspace'. Below this, the 'Module' is set to 'Released Products'. The 'Summary' section features four blue cards representing workflow stages: 'Draft' (1), 'Submitted' (1), 'InReview' (1), and 'Approved' (381). The 'Status' section includes a filter menu with 'Draft' selected. A table below the filter shows a single entry:

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.



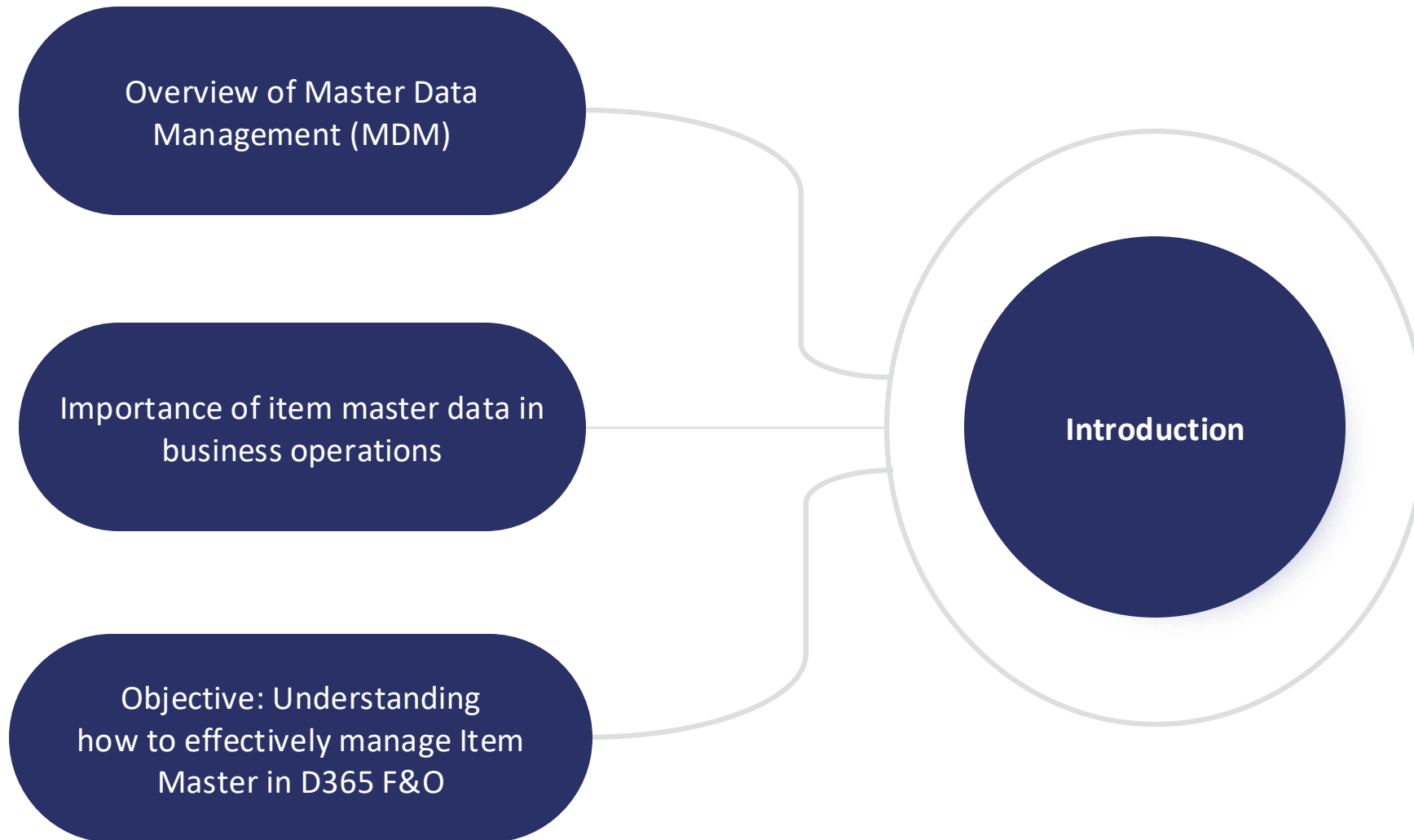
1. Control Your Master Data
 - › Define Control Policy at Global master level or Company Level
 - › Make Important Masters as Global
 - › Make Important Fields Mandatory
 - › Set User Groups/Centralize Team who can fill in information limited to their scope
 - › Define Dynamic Workflow for master data 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
3. 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

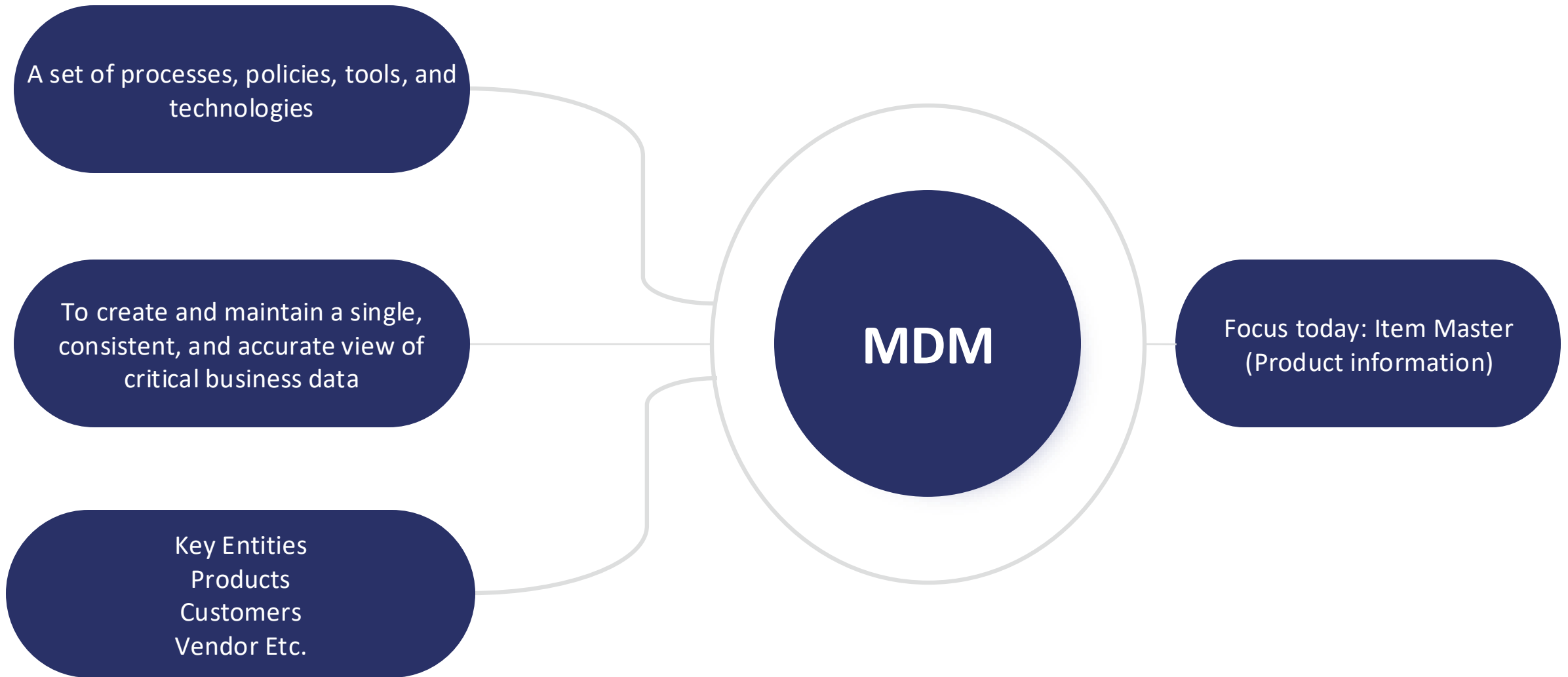
4. Easy Audit Logs Check
 - › Enable Logs Quickly
 - › Keep your Audit log Handy for auditing
 - › Review change quickly to answer business queries: Which master created or modified by whom and when
5. Audit Rules to check Data Health
 - › Data Completeness Rules
 - › Data Consistency Rules
 - › Data Accuracy Rules
 - › Data Lifecycle Rules
 - › Referential Integrity Rules
 - › Performance and Volume Rules
 - › Anomaly Detection via Power BI/Fabric
 - › Rule Hit Analytics

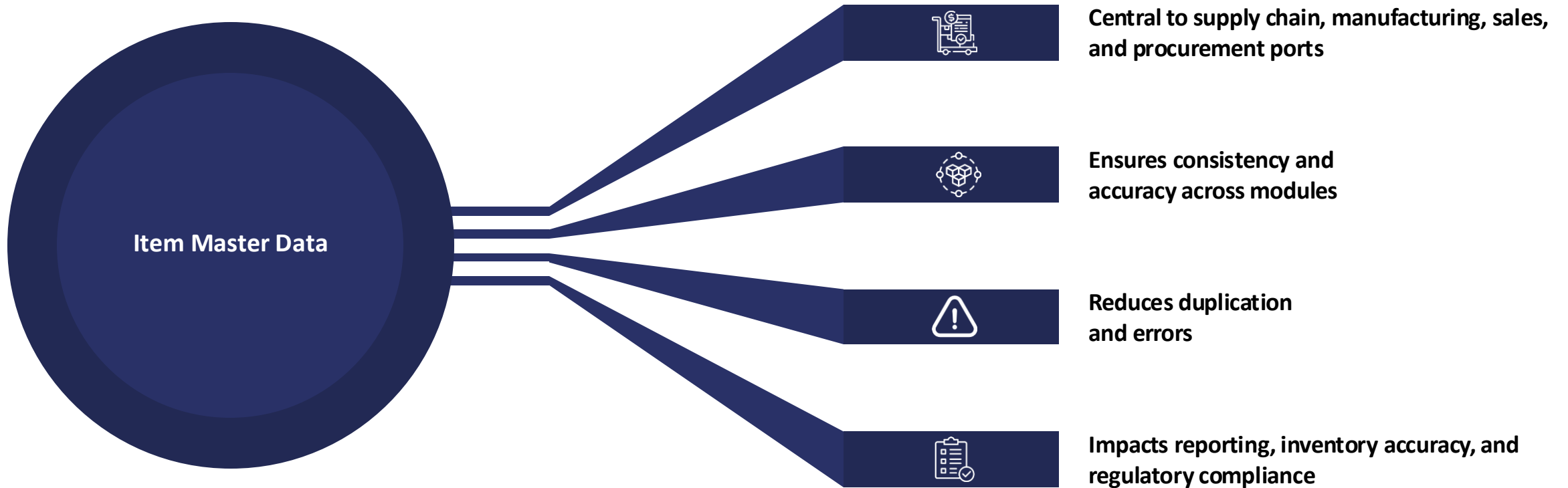
Master Data Management

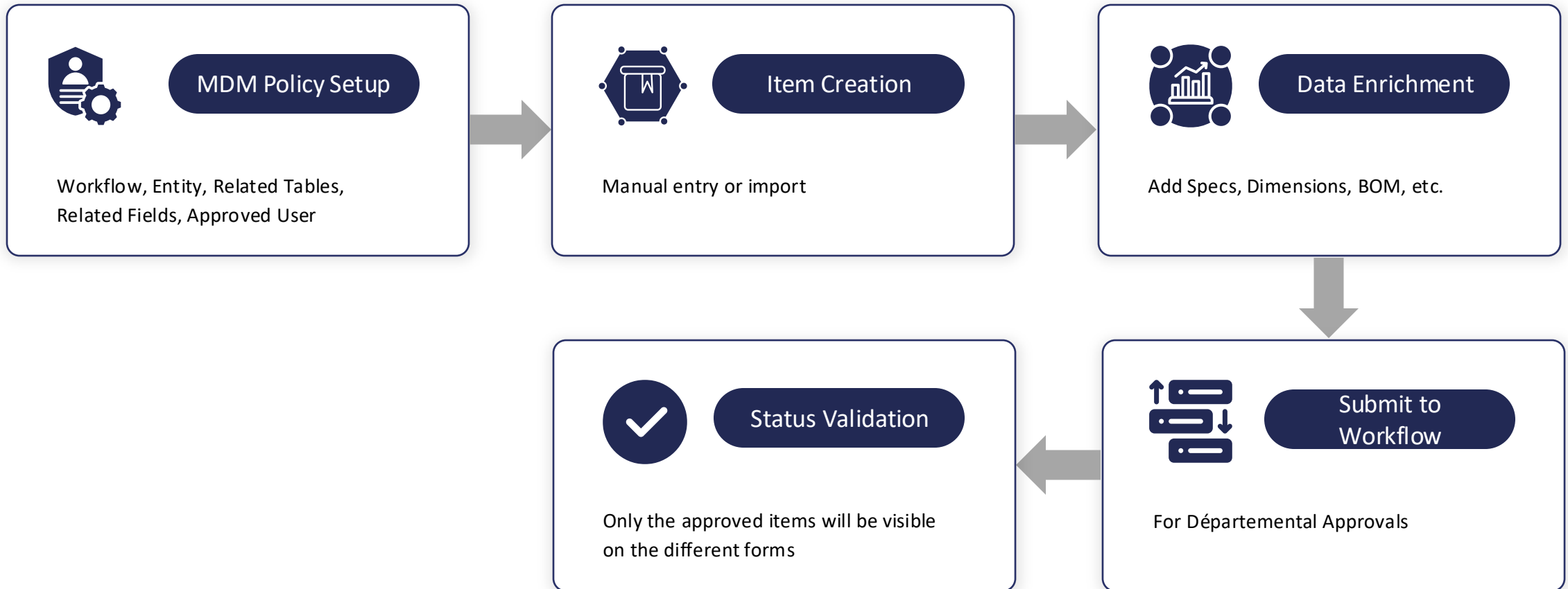
Item Master











- › 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)

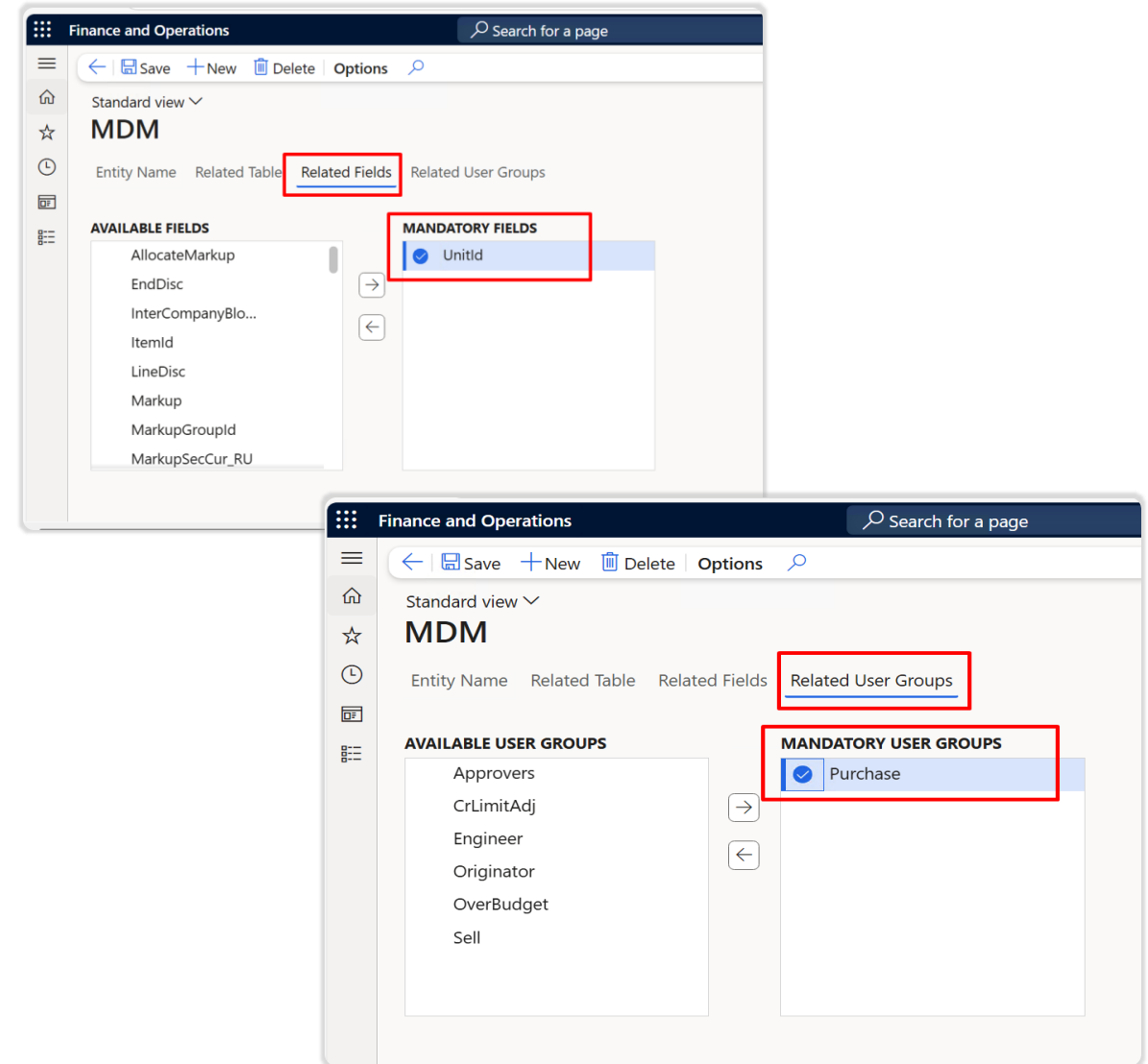
The screenshot shows the Dynamics 365 MDM setup interface. The page title is "Finance and Operations" and the search bar contains "Search for a page". The user is logged in as "USMF". The main content area is titled "MDM" and shows a "Standard view" dropdown. Below the title, there are four tabs: "Entity Name", "Related Table", "Related Fields", and "Related User Groups". The "Entity Name" tab is selected and highlighted with a red box. Below the tabs, there is a table with two columns: "Name" and "Number". The table contains one row with "Released Products" in the "Name" column and "Released Products" in the "Number" column. The "Released Products" row is highlighted in blue.

Name	Number
Released Products	Released Products

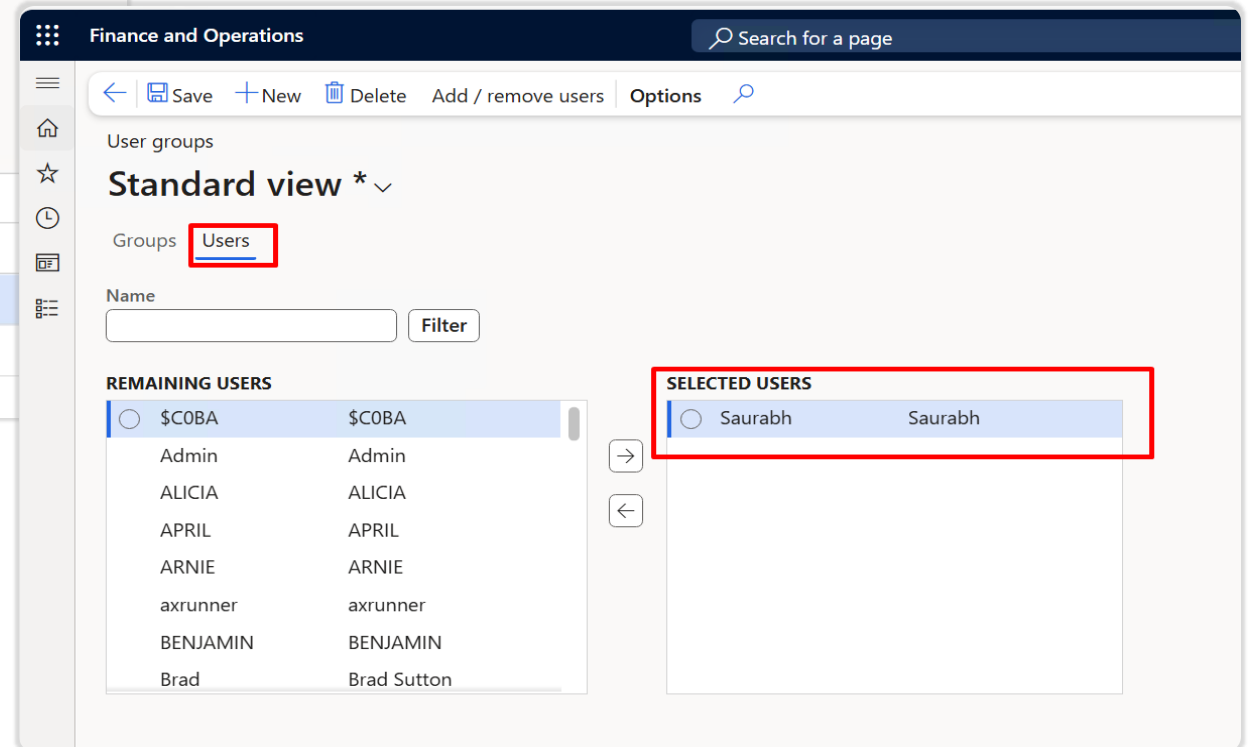
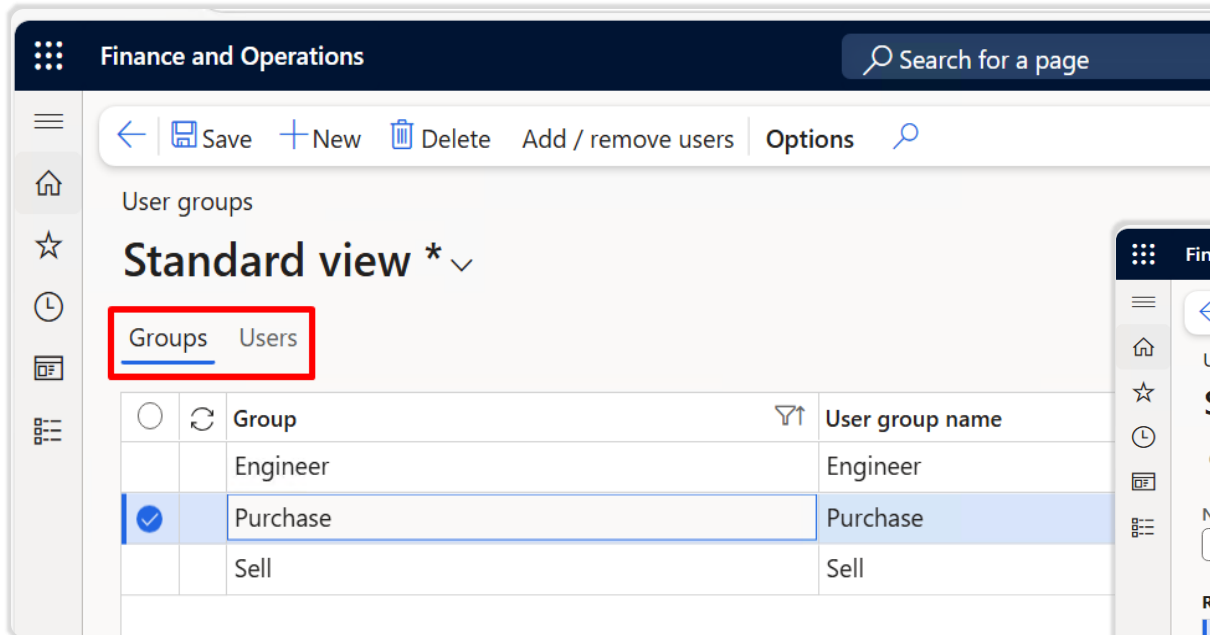
- › **Related Table** – In this grid, we have the list of available tables which is related to the entity selected on the Entity name grid. The user can move the tables from the Available tables grid to the Mandatory tables Grid. Here we have mandated the three tables InventTables, Sales and Purch.

The screenshot shows the Dynamics 365 MDM interface for configuring related tables. The 'Related Table' tab is highlighted with a red box. The 'AVAILABLE TABLES' list contains the following items: Invert, InventItemLocation, EcoResStorageDi..., EcoResTrackingDi..., InventItemGroupl..., InventModelGrou..., EcoResProduct, and EcoResProduct_Ec... The 'MANDATORY TABLES' list contains: InventTable, Sales, and Purch. The 'Purch' table is selected and highlighted in blue. Navigation arrows are visible between the two lists.

- › **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.



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

The screenshot displays the 'Released product details' page in Microsoft Dynamics 365 Finance and Operations. The page title is 'Standard view' and the item identifier is 'DT MDM 0104 : DT MDM 0104'. The 'General' tab is active, showing the following fields:

- 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:** (Empty text area)
- ADMINISTRATION:** Storage dimension group (SiteWH), Tracking dimension group (Batch-Phy), Item model group (FIFO).
- Reservation hierarchy:** (Empty text field)
- Counting reason code policy:** (Empty text field)
- Product lifecycle state:** (Empty dropdown menu)
- Advanced notes group:** (Empty dropdown menu)

The 'Purchase' tab is also visible at the bottom, showing fields for Purchase order unit, Administration buyer group, Price update latest purchase price, Charges price charges, Discounts line discount group, and Pricing precision.

- › 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 navigation bar includes 'Finance and Operations', a search bar, and user information 'USMF'. Below this is a secondary navigation bar with various functional areas: 'Product', 'Purchase', 'Sell', 'Manage inventory', 'Engineer', 'Plan', 'Manage projects', 'Manage costs', 'Commerce', 'General', 'Setup', and 'Options'. The 'Product' area is expanded, showing sub-sections: 'Maintain' (Apply template, Validate), 'New' (Product Template), 'Product master' (Released product variants, Product dimensions), 'Languages' (Translations), 'Set up' (Product attributes, Product categories, Product catalogs, Related products, Unit conversions, Advanced notes setup), 'Product kit' (Configure, Kit configurations), and 'Rebate management' (Rebate management groups). The 'Workflow' button in the 'Product master' section is highlighted with a red box. Below the navigation is the 'Released product details' section for 'DT MDM 0104 : DT MDM 0104' in 'Standard view'. The 'General' tab is active, 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 '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),

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...
- InventItemGroupl...
- InventModelGrou...
- EcoResProduct
- EcoResProduct_Ec...

MANDATORY TABLES

- InventTable
- Purch
- Sales

- › 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.

Finance and Operations

Standard view

MDM

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

AVAILABLE TABLES

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

MANDATORY TABLES

- InventTable
- Purch
- Sales

Finance and Operations

Standard view

MDM

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

AVAILABLE FIELDS

- ItemId
- ABCContribution...
- ABCRevenue
- ABCTieUp
- ABCValue
- AlcoholManufact...
- AlcoholProductio...
- AlcoholStrength_...

MANDATORY FIELDS

- BOMUnitId

- › 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...
- InventItemGroupl...
- 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

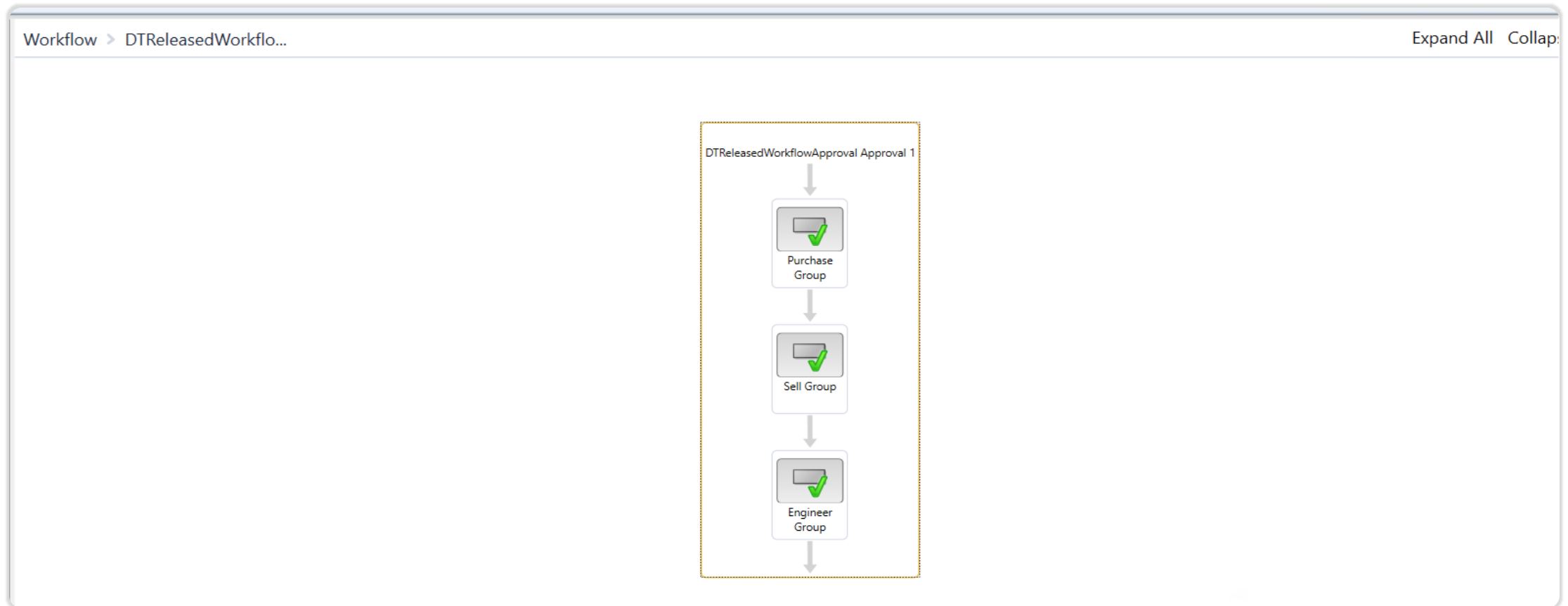
AVAILABLE FIELDS

- 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 S/4HANA Finance and Operations interface. The top navigation bar includes 'Finance and Operations', a search bar, and user information 'USMF'. The main navigation pane on the left shows various icons for navigation. The central area is titled 'Released product details' and shows 'Standard view'. The main content area displays 'DT MDM : DT MDM 0105' with a 'Title' field. Below this, there are sections for 'General', 'IDENTIFICATION', 'FURTHER IDENTIFICATION', and 'ADMINISTRATION'. The 'IDENTIFICATION' section includes fields for Product type, Item, Product subtype, Product service type, and Item number. The 'FURTHER IDENTIFICATION' section includes Product name. The 'ADMINISTRATION' section includes Storage dimension group. On the right side, the 'Action center' shows '1 total' notifications, with one notification stating: 'Please enter a value for the Mandatory field Unitld , Less than a minute ago'. There are 'See all' and 'Clear all' buttons in the action center.

- › 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.

Finance and Operations

Search for a page

USMF

Save + New Delete Options

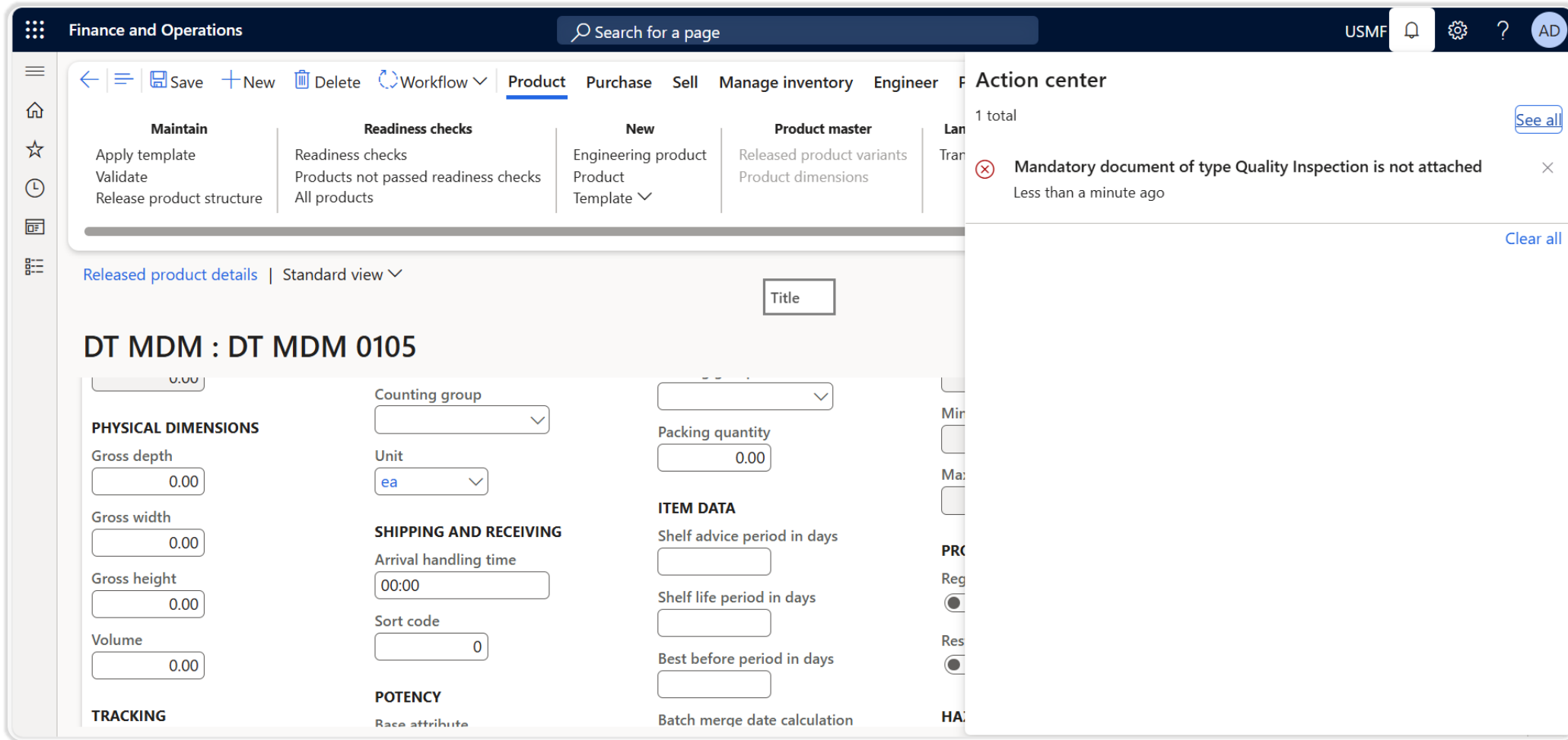
Enable Mandatory Documents Form

Standard view * v

Filter

	Module	Document Type	User Group
<input checked="" type="checkbox"/>	Released Products v	Quality Inspection v	Purchase v

- › 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.



- › 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 shows the Dynamics 365 Finance and Operations interface. At the top, there is a search bar and navigation tabs for 'Product', 'Purchase', 'Sell', 'Manage inventory', 'Engineer', and 'Plan'. Below this is a navigation pane with various options like 'View', 'Trade agreements', 'Approved vendor', 'Purchase order', 'Invoice matching', and 'Related information'. The main content area displays 'Released product details' in 'Standard view'. A table with columns for 'Item number', 'Product name', 'Search name', 'WorkFlowStatus', 'Product type', 'Product subtype', and 'F' is shown. The 'WorkFlowStatus' column for the item 'DT MDM 0104' is highlighted with a red box and contains the value 'InReview'.

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."

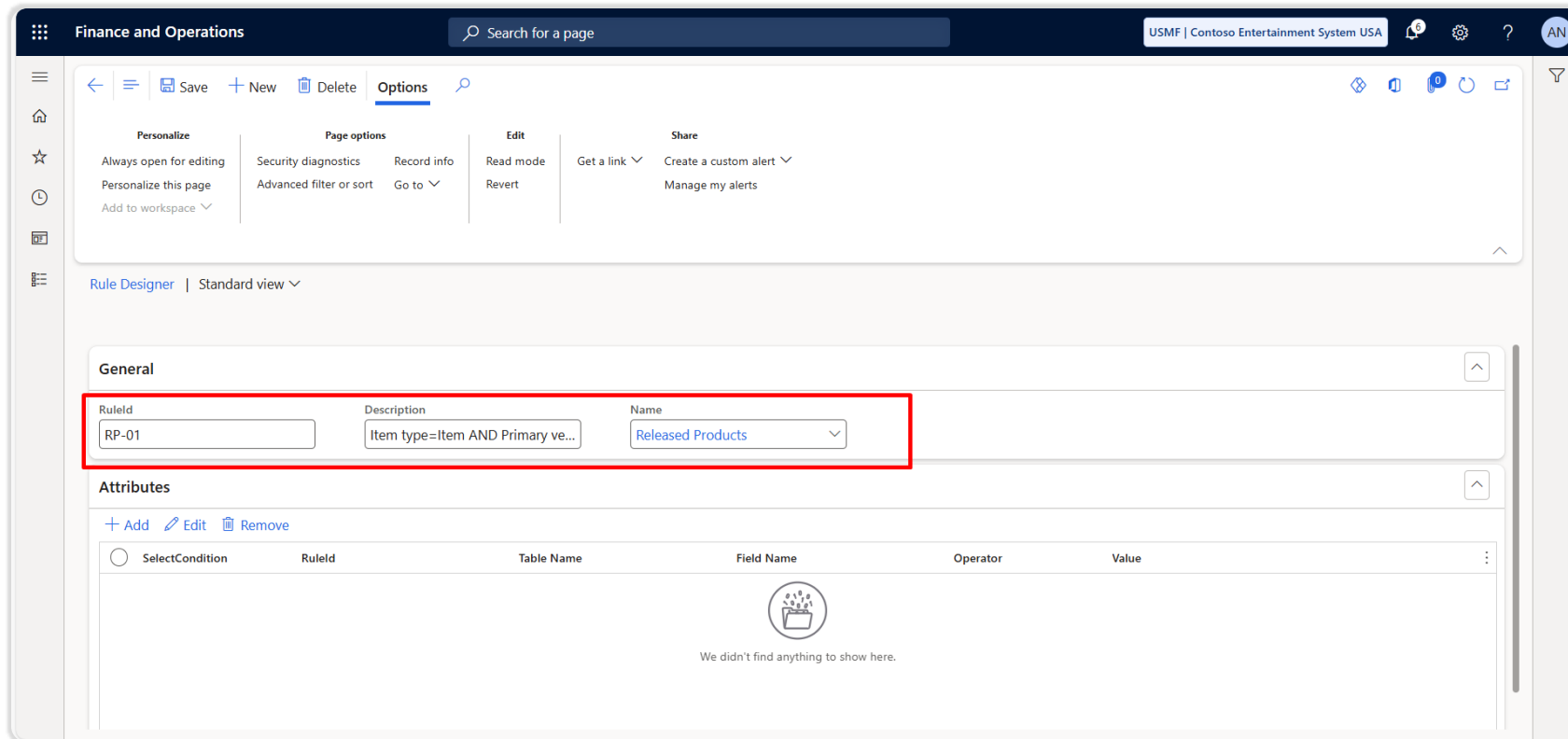
The screenshot displays the 'Query Designer Master' interface within the 'Finance and Operations' application. The top navigation bar includes 'USMF', a notification bell with '6', a settings gear, a help icon, and a user profile 'AN'. The main toolbar contains 'Save', 'New', 'Delete', 'Load Metadata', and 'Options'. The page title is 'Query Designer Master' and the view is 'Standard view'. A search bar labeled 'Filter' is present. Below the search bar is a table with the following data:

Type	Name
Released Products	ReleasedProducts

The row containing 'Released Products' and 'ReleasedProducts' is selected and highlighted in blue. A red rectangular box highlights this row.

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 in Dynamics 365. The 'General' tab is active, and the following fields are visible:

Field	Value
Ruleid	RP-01
Description	Item type=Item AND Primary ve...
Name	Released Products

The 'Attributes' section is 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. The 'Attributes' section is highlighted with a red box. It contains the following data:

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

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 Dynamics 365 Query Designer interface. The top navigation bar includes 'Finance and Operations', a search bar, and user information 'USMF | Contoso Entertainment System USA'. The main toolbar contains 'Save', '+ New', 'Delete', 'Run Query', and 'Options'. The 'Options' menu is open, showing 'Personalize', 'Page options', 'Edit', and 'Share' sections. The 'General' tab is selected, and the 'QueryDesignId' field is highlighted with a red box. The 'Description' field contains 'Item type + Primary vendor', and the 'Name' dropdown is set to 'ReleasedProducts'. The 'Attributes' section is empty, showing a table with columns for 'SelectCondition', 'Table Name', 'Field Name', 'Operator', and 'Value'. A message at the bottom of the table states 'We didn't find anything to show here.'

SelectCondition	Table Name	Field Name	Operator	Value
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.

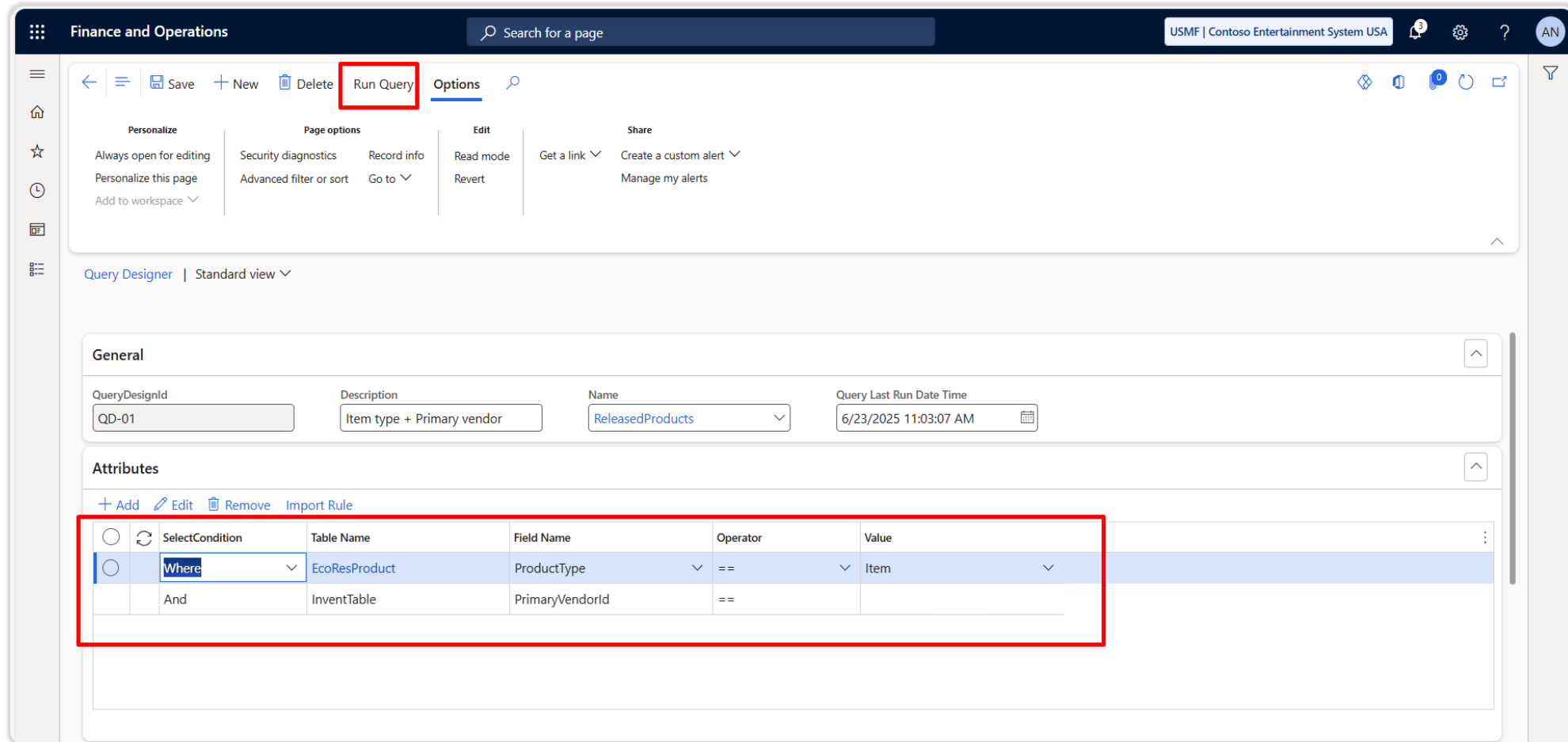
The screenshot displays the 'Query Designer' interface within the 'Finance and Operations' application. The main window shows the 'Attributes' tab with a table of attributes. The 'Import Rule' button is highlighted with a red box. An 'Import Rule' dialog box is open, showing a dropdown menu with 'RP-01' selected. Below the dropdown is a table of rules:

RuleId	Description
RP-01	Item type + Primary vendor

The 'Import Rule' dialog box also features 'OK' and 'Cancel' buttons at the bottom right.

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.

The screenshot shows the 'Query Designer' interface in Dynamics 365. The 'General' tab is active, displaying 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 with the following data:

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.

The screenshot shows the Dynamics 365 Finance and Operations interface. The top navigation bar includes 'Finance and Operations', a search bar, and user information (USMF, AD). The left-hand navigation pane shows the 'Number sequences' tab selected. The main area displays the 'Master data management parameters' form, specifically the 'Set up Number Sequence for MDM Parameters' section. The 'Reference' dropdown is set to 'Change order', and the 'Number sequence' dropdown is set to 'MDCO'. The 'Order Id' field is visible below the table.

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

MDM Master

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

Finance and Operations

← Edit + New Delete Options

MDM Categories

Standard view ▾

Category	Description
<input type="radio"/> Change	Change
<input type="radio"/> Issue	Issue
<input type="radio"/> New Development	New Development

Finance and Operations

← Edit + New Delete Options

MDM Priorities

Standard view ▾

Priority	Description
<input type="radio"/> Emergency	Emergency
<input type="radio"/> Routine	Routine
<input type="radio"/> Urgent	Urgent

Finance and Operations

← Edit + New Delete Options

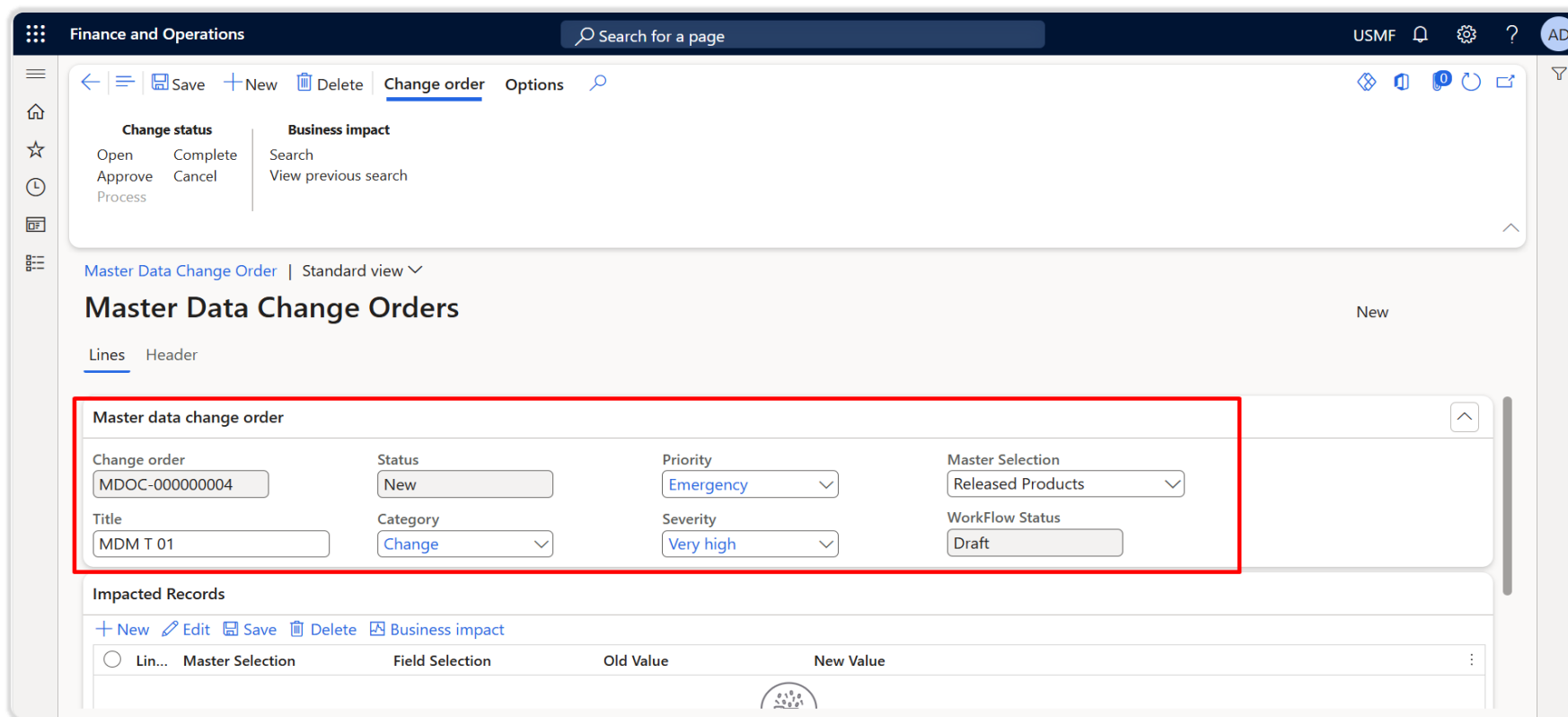
MDM Severities

Standard view ▾

Severity	Description
<input type="radio"/> High	High
<input type="radio"/> Minimal	Minimal
<input type="radio"/> Normal	Normal
<input type="radio"/> 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.



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 Orders' interface. At the top, there are navigation options: 'Change status' (Open, Complete, Approve, Cancel, Process), 'Business impact' (Search, View previous search), and 'Change order' (Options). The 'Process' button is highlighted with a red box. Below this is the 'Master Data Change Order' form with the following fields:

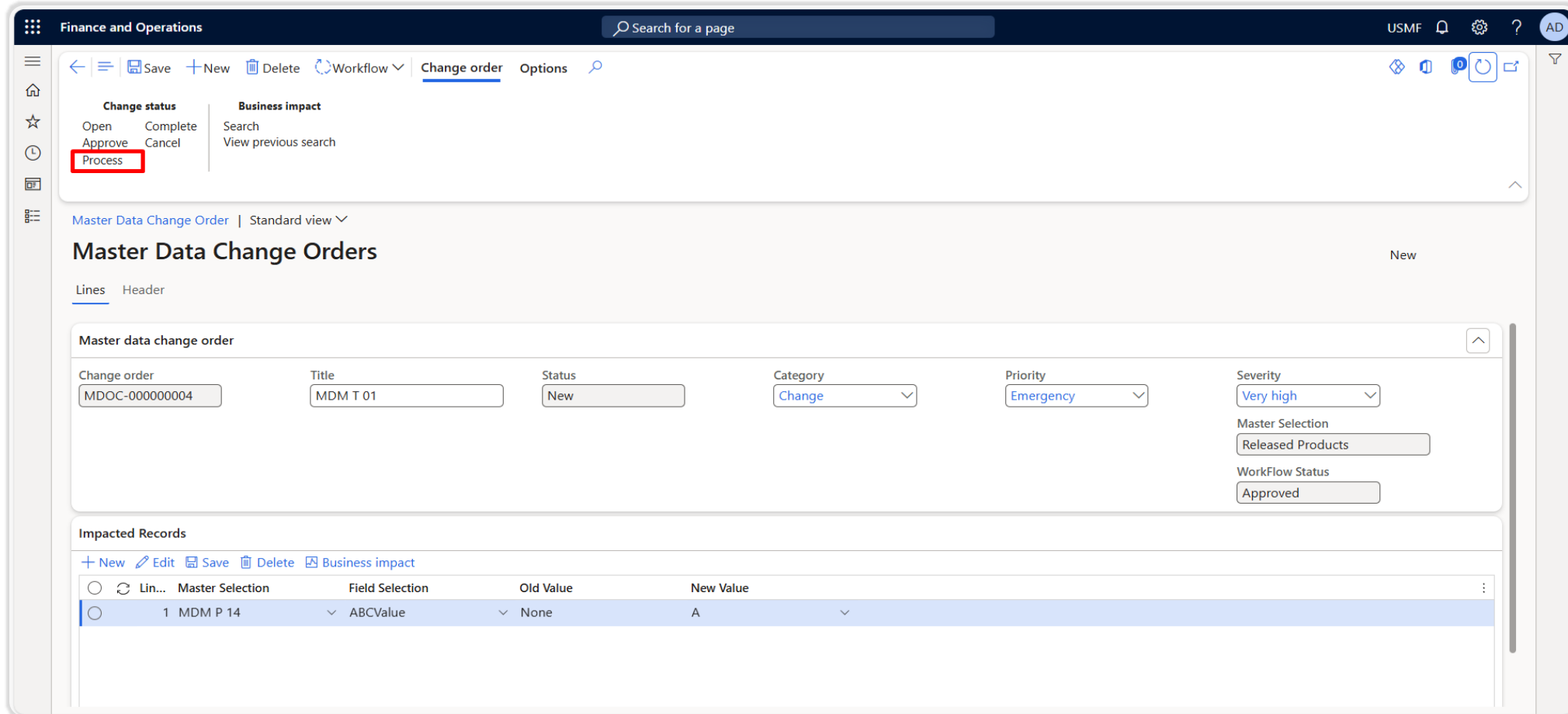
- Change order: MDOC-00000004
- Title: MDM T 01
- Status: New
- Category: Change
- Priority: Emergency
- Severity: Very high
- Master Selection: Released Products
- WorkFlow Status: Draft (highlighted with a red box)

Below the form is the 'Impacted Records' table, which is highlighted with a red box:

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

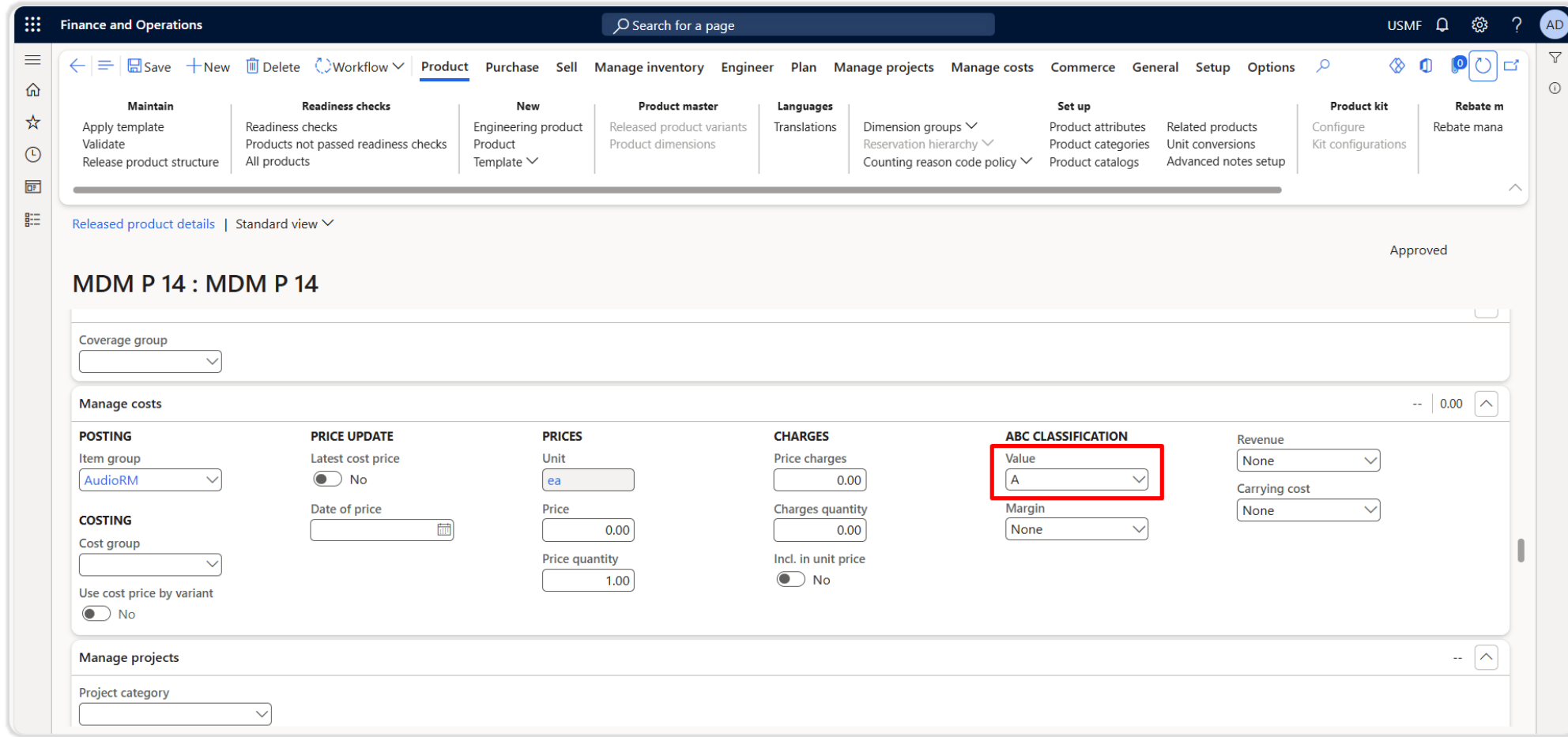
Master Data Change Order

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



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.

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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