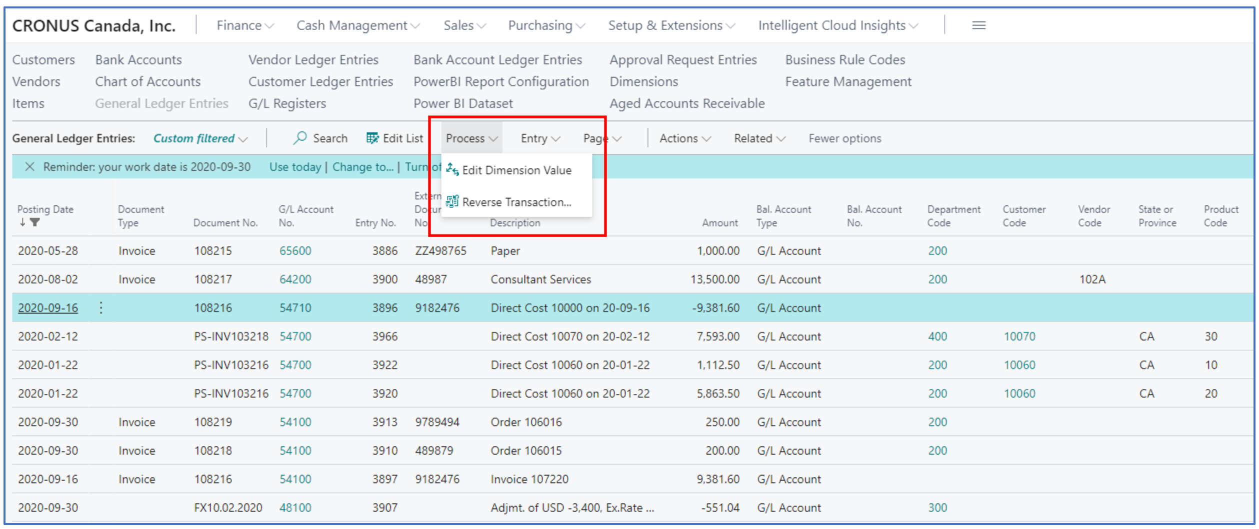
Edit Dimension Values and Business Rules

This training guide covers how to use the Edit Dimension Values function and set up business rules in Business Central. Edit Dimension Values lets you change dimension coding mistakes without having to enter correcting journal entries. Business Rules allow you to set rules for valid combinations of dimension values for specific accounts which makes the data entry process for accurate and less prone to error. If errors are made, they can be fixed easily with the Edit Dimension Values function.

Edit Dimension Values

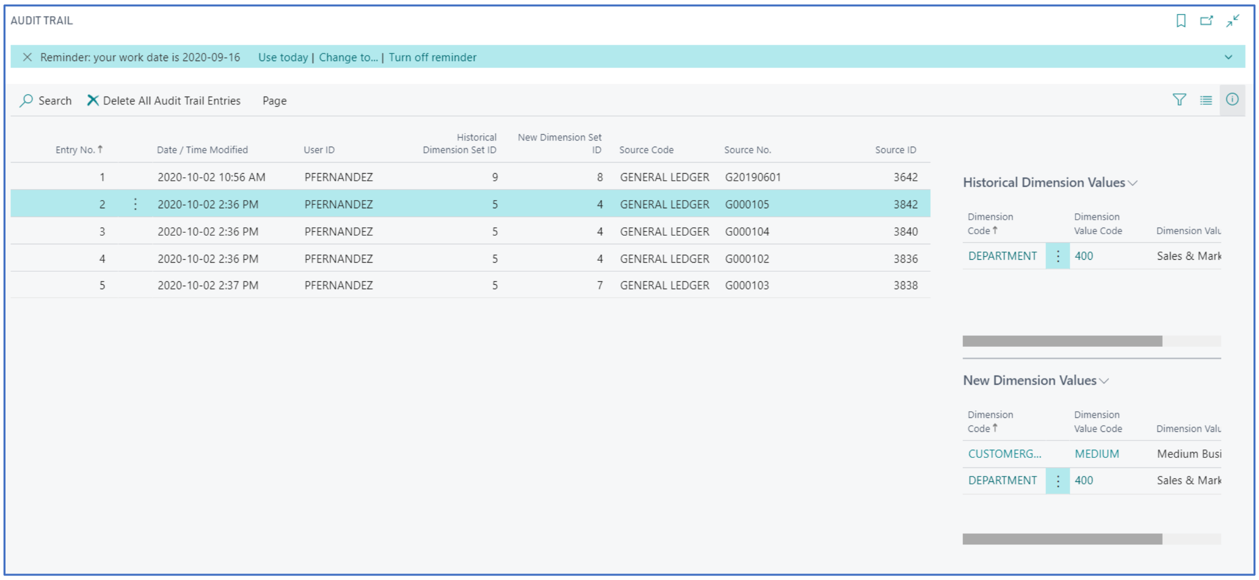
This function has been added to the General Ledger Entries table as well as other ledger tables. It allows you to change the dimension values of posted transactions in the case where the wrong dimension value has been posted. The module keeps track of who made the changes and what the original dimension value was before it was changed, in an Audit Trail.

The Edit Dimension Values function can be found in the Process menu.



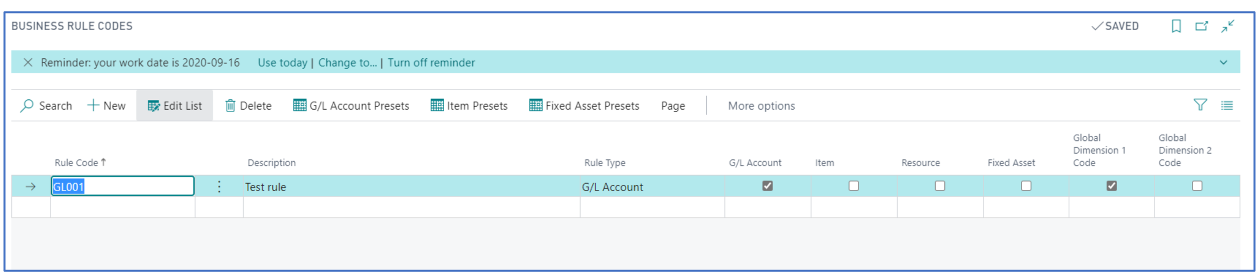
Audit Trail

Type Audit Trail in the search box and click on Audit Trail. Click on any entry in the left window and the right window will show you what the original dimension value was. In the following screen shot, the CUSTOMERGROUP code was changed from blank to MEDIUM.

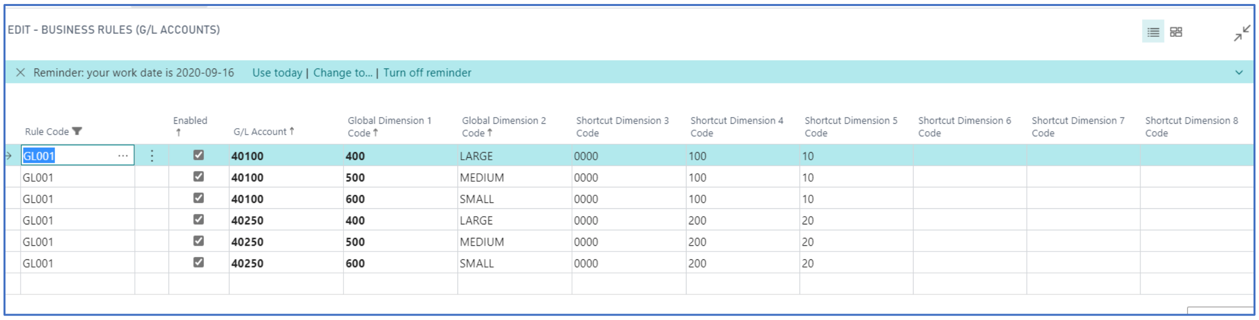


Business Rules

Enter Business Rule in the search box and select Business Rules Codes. The following screen shot shows one code that has been set up for GL Accounts. The rule is based on the Account Code and the DEPARTMENT code (Global Dimension 1 Code).



Click on the Rule Code, and then click on G/L Account Presets in the ribbon. The following business rules have been set up. Each rule is triggered on the bold items, in this example they are G/L Account number and DEPARTMENT (Global Dimension 1 Code). For each combination of account and department shown in the list below, the business rule will populate the other 4 dimensions as shown. If a user enters a different combination of codes, including blanks (i.e. not entering a code at all), then the business rule will populate the entry with the preset codes in the business rule.



EDIT - BUSINESS RULES (G/L ACCOUNTS)

Reminder: your work date is 2020-09-16 Use today | Change to... | Turn off reminder

Rule Code	Enabled	G/L Account	Global Dimension 1 Code	Global Dimension 2 Code	Shortcut Dimension 3 Code	Shortcut Dimension 4 Code	Shortcut Dimension 5 Code	Shortcut Dimension 6 Code	Shortcut Dimension 7 Code	Shortcut Dimension 8 Code
GL001	☑	40100	400	LARGE	0000	100	10			
GL001	☑	40100	500	MEDIUM	0000	100	10			
GL001	☑	40100	600	SMALL	0000	100	10			
GL001	☑	40250	400	LARGE	0000	200	20			
GL001	☑	40250	500	MEDIUM	0000	200	20			
GL001	☑	40250	600	SMALL	0000	200	20			

Chart of Accounts Card

There are two additional fields that have been added to the Chart of Accounts card:

- **Apply Business Rules Presets** – this applies any presets that you have set up in the Business Rules. If this field is turned on, then any presets that have been set up will apply to transactions entered and will default the applicable dimension values. The preset dimension values will populate into the journal entry or document, saving data entry time and ensuring accuracy of coding.
- **Apply Business Rules Validation** – if you enable this field, then any default dimension values set in the Business Rules cannot be changed during data entry. At the time of posting, this function will check the combination of dimension values to make sure it matches the presets and if it doesn’t match, it will not let you post and will give you an error message. This setting forces the Business Rules Presets to be applied.