

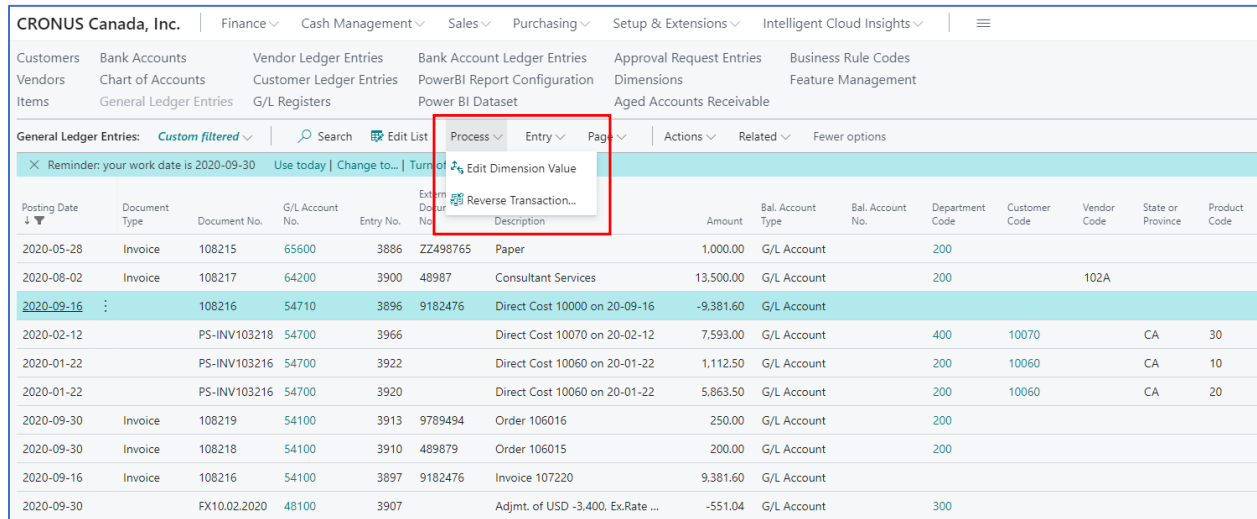
# Edit Dimension Values and Business Rules

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.



The screenshot displays the Business Central interface for 'CRONUS Canada, Inc.'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Setup & Extensions', and 'Intelligent Cloud Insights'. Below this, a secondary navigation bar lists various modules such as 'Customers', 'Bank Accounts', 'Vendor Ledger Entries', 'Bank Account Ledger Entries', 'Approval Request Entries', and 'Business Rule Codes'. The main area shows the 'General Ledger Entries' table with a 'Process' menu open, highlighting the 'Edit Dimension Value' option. The table contains columns for Posting Date, Document Type, Document No., G/L Account No., Entry No., Extn. Doc. No., Description, Amount, Bal. Account Type, Bal. Account No., Department Code, Customer Code, Vendor Code, State or Province, and Product Code. A specific row is highlighted in blue, showing a transaction on 2020-09-16 with a description 'Direct Cost 10000 on 20-09-16' and an amount of -9,381.60.

Posting Date	Document Type	Document No.	G/L Account No.	Entry No.	Extn. Doc. No.	Description	Amount	Bal. Account Type	Bal. Account No.	Department Code	Customer Code	Vendor Code	State or Province	Product Code
2020-05-28	Invoice	108215	65600	3886	ZZ498765	Paper	1,000.00	G/L Account		200				
2020-08-02	Invoice	108217	64200	3900	48987	Consultant Services	13,500.00	G/L Account		200		102A		
2020-09-16	:	108216	54710	3896	9182476	Direct Cost 10000 on 20-09-16	-9,381.60	G/L Account						
2020-02-12		PS-INV103218	54700	3966		Direct Cost 10070 on 20-02-12	7,593.00	G/L Account		400	10070		CA	30
2020-01-22		PS-INV103216	54700	3922		Direct Cost 10060 on 20-01-22	1,112.50	G/L Account		200	10060		CA	10
2020-01-22		PS-INV103216	54700	3920		Direct Cost 10060 on 20-01-22	5,863.50	G/L Account		200	10060		CA	20
2020-09-30	Invoice	108219	54100	3913	9789494	Order 106016	250.00	G/L Account		200				
2020-09-30	Invoice	108218	54100	3910	489879	Order 106015	200.00	G/L Account		200				
2020-09-16	Invoice	108216	54100	3897	9182476	Invoice 107220	9,381.60	G/L Account						
2020-09-30		FX10.02.2020	48100	3907		Adjmt. of USD -3,400, Ex.Rate ...	-551.04	G/L Account		300				

## 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.

The screenshot shows the 'AUDIT TRAIL' interface. At the top, there is a reminder: 'Reminder: your work date is 2020-09-16 Use today | Change to... | Turn off reminder'. Below this is a search bar and a 'Delete All Audit Trail Entries' button. The main area contains a table with the following data:

Entry No. ↑	Date / Time Modified	User ID	Historical Dimension Set ID	New Dimension Set ID	Source Code	Source No.	Source ID
1	2020-10-02 10:56 AM	PFERNADEZ	9	8	GENERAL LEDGER	G20190601	3642
2	2020-10-02 2:36 PM	PFERNADEZ	5	4	GENERAL LEDGER	G000105	3842
3	2020-10-02 2:36 PM	PFERNADEZ	5	4	GENERAL LEDGER	G000104	3840
4	2020-10-02 2:36 PM	PFERNADEZ	5	4	GENERAL LEDGER	G000102	3836
5	2020-10-02 2:37 PM	PFERNADEZ	5	7	GENERAL LEDGER	G000103	3838

On the right side, there are two panels: 'Historical Dimension Values' and 'New Dimension Values'. The 'Historical Dimension Values' panel shows:

Dimension Code ↑	Dimension Value Code	Dimension Val.
DEPARTMENT	400	Sales & Mark

The 'New Dimension Values' panel shows:

Dimension Code ↑	Dimension Value Code	Dimension Val.
CUSTOMERGR...	MEDIUM	Medium Busi
DEPARTMENT	400	Sales & Mark

## 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).

The screenshot shows the 'BUSINESS RULE CODES' interface. At the top, there is a reminder: 'Reminder: your work date is 2020-09-16 Use today | Change to... | Turn off reminder'. Below this is a search bar and a 'New' button. The main area contains a table with the following data:

Rule Code ↑	Description	Rule Type	G/L Account	Item	Resource	Fixed Asset	Global Dimension 1 Code	Global Dimension 2 Code
GL001	Test rule	G/L Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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)										
X 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	<input checked="" type="checkbox"/>	40100	400	LARGE	0000	100	10			
GL001	<input checked="" type="checkbox"/>	40100	500	MEDIUM	0000	100	10			
GL001	<input checked="" type="checkbox"/>	40100	600	SMALL	0000	100	10			
GL001	<input checked="" type="checkbox"/>	40250	400	LARGE	0000	200	20			
GL001	<input checked="" type="checkbox"/>	40250	500	MEDIUM	0000	200	20			
GL001	<input checked="" type="checkbox"/>	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.