

# Release Notes for Data Entry Workflow 10.0.39.14

Release Notes

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# Document Information

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# 1. Introduction

## 1.1 Purpose

This document highlights new features, bug fixes and improvements in this release of Data Entry Workflow (DEW) 10.0.39.14 from To-Increase B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, 10.0.36 and higher.

## 1.2 Audience

This document is intended for new users of Data Entry Workflow partners and customers. Some knowledge of Dynamics 365 for Finance and Operations is assumed.

## 1.3 Deliverables

Deliverable	Description
<b>Solution package</b>	Data Entry Workflow is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
<b>Software deployable package</b>	Data Entry Workflow 10.0.39.14
<b>Release notes</b>	This document is provided with the Data Entry Workflow product deliverables.
<b>Implementation methodology</b>	The solution package contains a <i>Data Entry Workflow implementation methodology</i> that provides detailed step-by-step instructions on how to install, learn, and implement the solution.
<b>Getting started BPM library</b>	The solution package includes a <i>Getting started with Data Entry Workflow</i> BPM library. This library contains several task guides that showcase some of the key capabilities of Data Entry Workflow.
<b>Documentation BPM library</b>	We are working on the documentation for <i>Data Entry Workflow</i> . This is not published as BPM library on the moment of this release.
<b>Authentication assets</b>	A To-Increase security certificate is provided to allow trusted installation of the provided model files and ISV license files.

## 1.4 Product Release information

*Data entry workflow 10.0.38.13 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.36. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running on D365*

version 10.0.36 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.39, we recommend applying our TI product release on that MS version as well. If you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.

This is summarized in the following table.



Release date [TI-Product]	[TI-Version number]	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
10/01/2024	10.0.37.12	10.0.34	10.0.37	10.0.34 and above
9/02/2024	10.0.38.13	10.0.35	10.0.38	10.0.35 and above
09/04/2024	10.0.39.14	10.0.36	10.0.39	10.0.36 and above

In case of an Error, To-Increase may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. To-Increase cannot be obliged to provide Hotfixes if Client has not deployed the latest Release or the Release second to the latest Release and/or is not using a supported version of Microsoft Dynamics.

To ensure our customers can fully leverage the latest enhancements, features, and quality improvements, we are committed to providing increased support by keeping them updated with the most recent releases. Our data indicates that customers on the latest version experience fewer issues and requests, demonstrate greater resilience, and effectively enhance their organizational efficiency.

More information about our latest available product versions, the latest validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : [Knowledge Base - Support - To-Increase](#)

## 1.5 SHA256 algorithm for licenses

You may have already been informed by Microsoft, that licenses that are generated using the SHA1 algorithm will no longer be supported starting at Microsoft Dynamics 365's F&SCM version 10.0.39. This update will be generally made available by Microsoft on March 15th, 2024.

As we currently use the SHA1 algorithm for our licenses, there is an action for you to take to ensure you can continue using our services. We introduce the new SHA256 algorithm for our licenses, which will be supported going forward by Microsoft.

What do you need to do before updating to version 10.0.39?

1. Please go to the Solution Management Workspace in your F&SCM environment
2. Retrieve and install these licenses based on the SHA256 algorithm. You can find a guide on how to do that under [this link](#)

After retrieving and installing the new license, you can upgrade to version 10.0.39 without any interruptions to our services.

There should be no effect on any of your performance. In case you experience any effect, please reach out to us under [customeroperations@to-increase.com](mailto:customeroperations@to-increase.com).

## 2. What's New

### 2.1 Current release

#### 2.1.1 Customer template design accelerator

This enhancement will allow a DEW user to configure a customer template using the design accelerator configured in the application. To use the design accelerator, application will allow the user to use the "Configure step" button to select the fields for the template.

Data entry workflow templates | Standard view ▾

### 000172 : Cust\_aCCelerator PO

**General**

Template 000172	Category Cust ▾	Change set 0
Name Cust_aCCelerator PO	Version management	<b>VERSION</b> Version number 1

**Workflow diagram**

Edit Refresh Select fields **Configure step**

Customer Details

Workflow: 000172, Version: 1

On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

1. Select the template.

### Configure data entry workflow template

● Welcome  
○ Configuration  
○ Summary

Use this wizard to configure your data entry workflow template. Please select a template type to continue

Template accelerator type

- None
- Product
- Customer
- Vendor

2. Enable the field groups (from Dynamics 365) using which you want to create the data entry workflow template and click on **Next** button.

Please select the elements to create for your workflow.

Customer main data	Performs the base operations for customer template accelerator scenarios
<input type="radio"/> No	
Customer address information	Define customer addresses in your template
<input type="radio"/> No	
Customer contact information	Define customer contact information in your template
<input type="radio"/> No	

3. Select the customer template type and enable the type of information that you want to use from customer basic details (main data) and click on Next button.

Please select what customer elements need added to the workflow

Customer template type  
 Organisation

Identification  
 Yes

Credit information  
 Yes

Tax information  
 Yes

4. Select the contact address information field using the arrow buttons and click on Next button.

Please select the address elements to create in the workflow

Purpose field  
 No

**AVAILABLE**

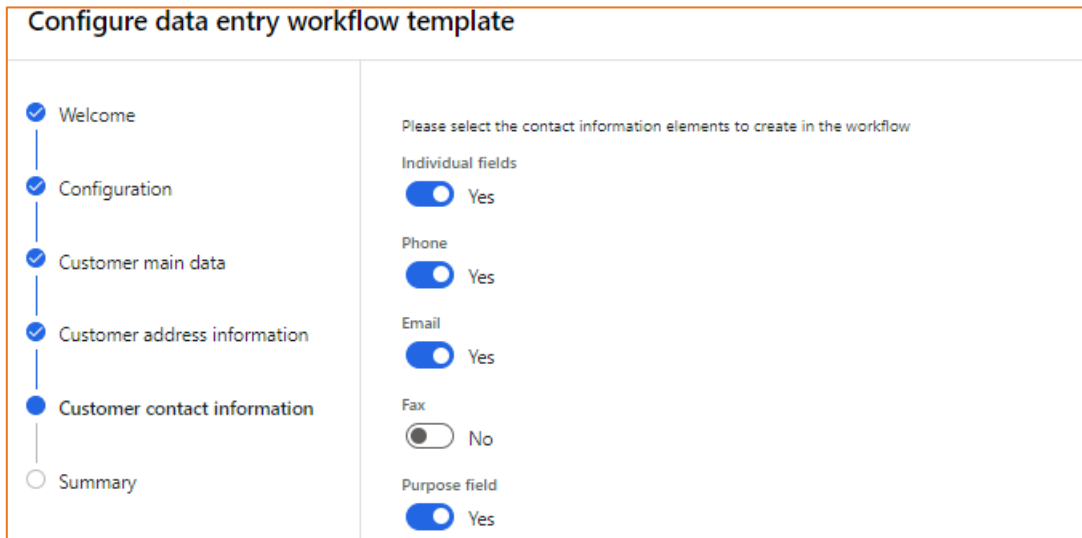
- Address application object
- Country/region
- Street
- District
- Street number
- Building complement
- Post box
- Street code

**SELECTED**

- Address application object
- Postcode
- City
- County
- State or province

Note: You can enable “Purpose field” to allow the user to configure purpose field for customer address information.

5. Enable the contact information fields that you want to configure on the template and click on Next button.



**Configure data entry workflow template**

✓ Welcome  
✓ Configuration  
✓ Customer main data  
✓ Customer address information  
● Customer contact information  
○ Summary

Please select the contact information elements to create in the workflow

Individual fields  Yes

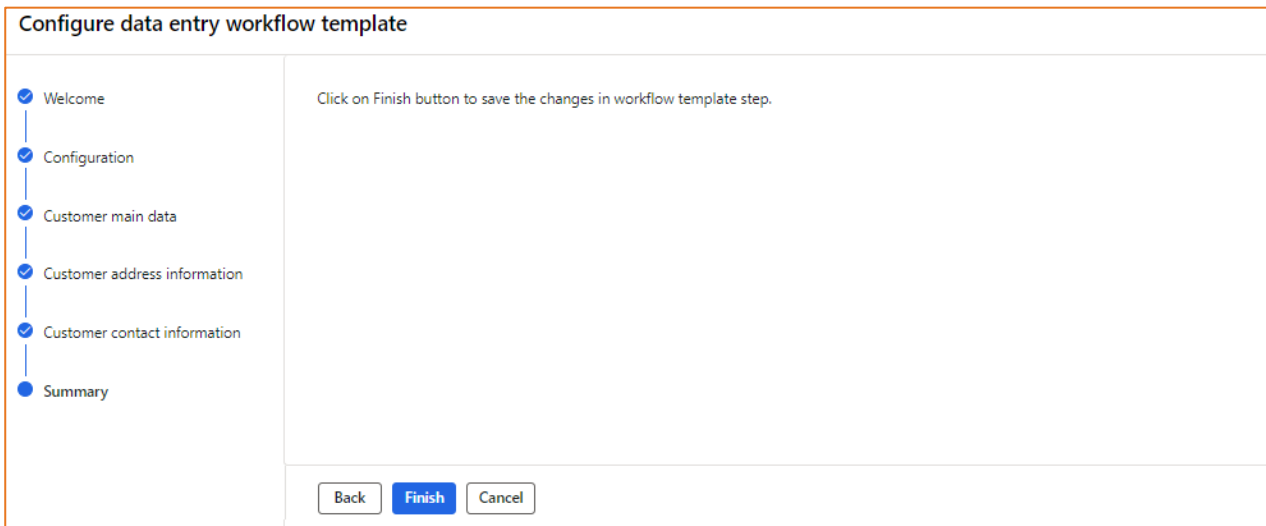
Phone  Yes

Email  Yes

Fax  No

Purpose field  Yes

6. Click on the **Finish** button to finish selecting the fields.



**Configure data entry workflow template**

✓ Welcome  
✓ Configuration  
✓ Customer main data  
✓ Customer address information  
✓ Customer contact information  
● Summary

Click on Finish button to save the changes in workflow template step.

Back Finish Cancel

On the click of **Finish** button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

User can navigate to the individual fields and can remove the field(s) if needed.



## 2.1.2 Product template design accelerator

This enhancement will allow a DEW user to configure a product template using the design accelerator configured in the application. To use the design accelerator, application will allow the user to use the “Configure step” button to select the fields for the template.

000174 : Prod\_Template\_PO

**General**

Template: 000174    Category: [dropdown]    Change set: 0    Version name: [text]  
Name: Prod\_Template\_PO    Version management: [text]    **VERSION**    Status: Draft  
Version number: 1

**Workflow diagram**

Finish + Add Remove Add dependency Copy Cut Paste Refresh Select fields **Configure step**

Product Details

Workflow: 000174, Version: 1

On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

1. Select the template.

● Welcome  
○ Configuration  
○ Summary

Use this wizard to configure your data entry workflow template. Please select a template type to continue

Template accelerator type

None  
 Product  
 Customer  
 Vendor

2. Enable the field groups (from Dynamics 365) using which you want to include in the data entry workflow template and click on **Next** button.

**Configure data entry workflow template**

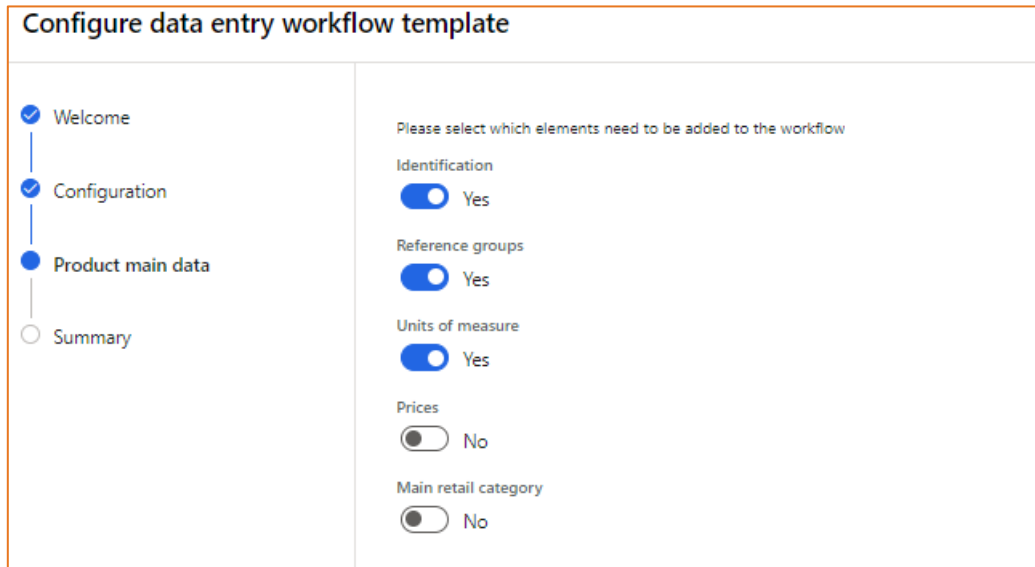
✔ Welcome  
● Configuration  
○ Summary

Please select the elements to create for your workflow.

Product main data    Performs the base operations for product template accelerator scenarios

Yes

3. Select the customer template type and enable the product main data that you want to include in the data entry workflow template and click on Next button.



**Configure data entry workflow template**

Please select which elements need to be added to the workflow

Identification  Yes

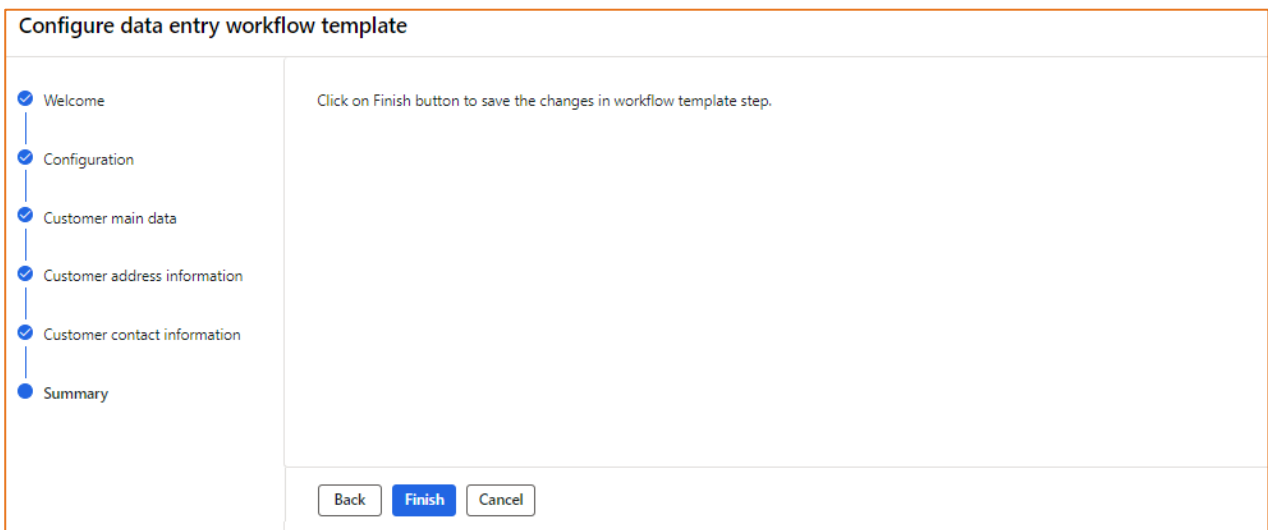
Reference groups  Yes

Units of measure  Yes

Prices  No

Main retail category  No

4. Click on the *Finish* button to finish selecting the fields.



**Configure data entry workflow template**

Click on Finish button to save the changes in workflow template step.

Back Finish Cancel

On the click of *Finish* button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

User can navigate to the individual fields and can remove the field(s) if needed.

### 2.1.3 Vendor template design accelerator

This enhancement will allow a DEW user to configure a vendor template using the design accelerator configured in the application. To use the design accelerator, application will allow the user to use the “Configure step” button to select the fields for the template.

Data entry workflow templates | Standard view

## 000175 : Vendor\_Template\_PO

**General**

Template	Category	Change set	Version name
<input type="text" value="000175"/>	<input type="text" value="Vend"/>	<input type="text" value="0"/>	<input type="text"/>
Name	Version management	<b>VERSION</b>	Status
<input type="text" value="Vendor_Template_PO"/>	<input type="text"/>	Version number	<input type="text" value="Draft"/>
		<input type="text" value="1"/>	

**Workflow diagram**

Finish + Add Remove Add dependency Copy Cut Paste Refresh Select fields **Configure step**

Basic Details

Workflow: 000175, Version: 1

On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

1. Select the template.

### Configure data entry workflow template

Welcome

Configuration

Summary

Use this wizard to configure your data entry workflow template. Please select a template type to continue

Template accelerator type

- None
- Product
- Customer
- Vendor

2. Enable the field groups (from Dynamics 365) using which you want to create the data entry workflow template and click on **Next** button.

### Configure data entry workflow template

- Welcome
- Configuration
- Summary

Please select the elements to create for your workflow.

Vendor main data Performs the base operations for vendor template accelerator scenarios  
 No

Vendor address information Define vendor addresses in your template  
 No

Vendor contact information Define vendor contact information in your template  
 No

3. Select the vendor template type and enable the type of information that you want to use from vendor basic details (main data) and click on Next button.

### Configure data entry workflow template

- Welcome
- Configuration
- Vendor main data
- Vendor address information
- Vendor contact information
- Summary

Please select what customer elements need added to the workflow

Vendor template type

Identification  
 Yes

Credit information  
 Yes

Tax information  
 Yes

4. Select the contact address information field using the arrow buttons and click on Next button.

### Configure data entry workflow template

- Welcome
- Configuration
- Vendor main data
- Vendor address information
- Vendor contact information
- Summary

Please select the address elements to create in the workflow

Purpose field  
 No

**AVAILABLE**

- Address application object
- Country/region
- Street
- District
- Street number
- Building complement
- Post box
- Street code

→

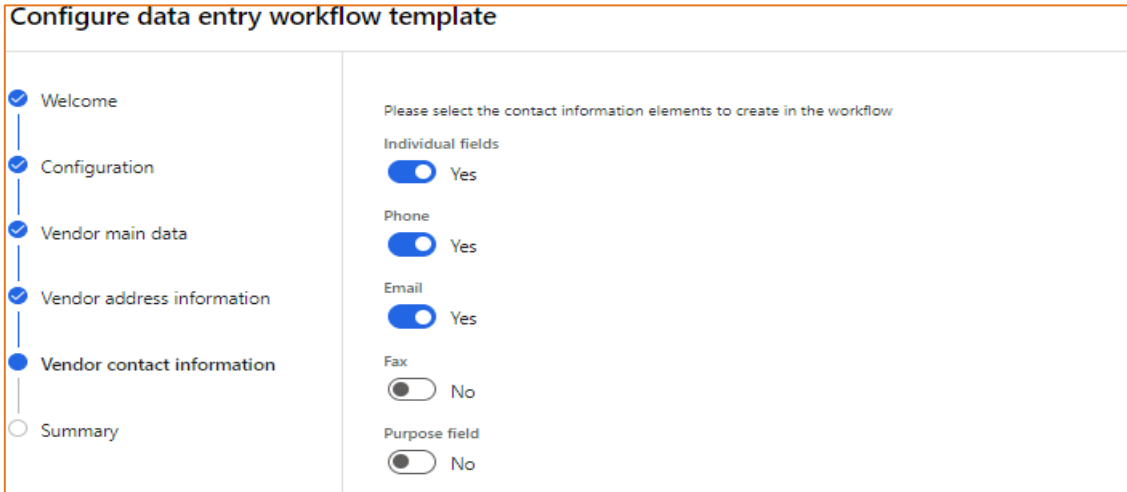
←

**SELECTED**

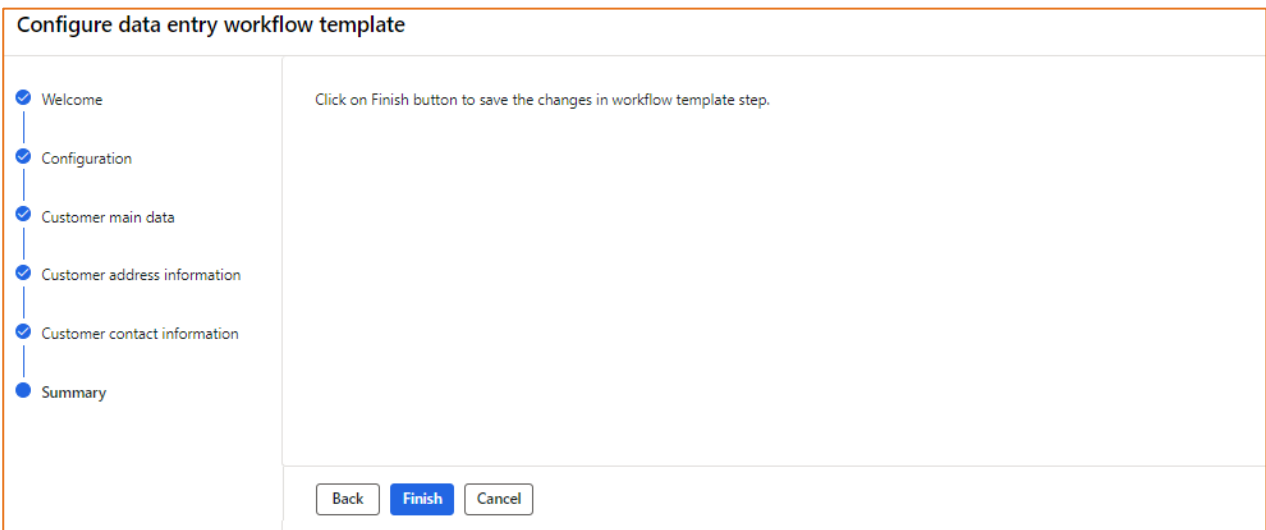
- Address application object
- Postcode
- City
- County
- State or province

Note: You can enable “Purpose field” to allow the user to configure purpose field for customer address information.

5. Enable the contact information fields that you want to configure on the template and click on Next button.



6. Click on the **Finish** button to finish selecting the fields.

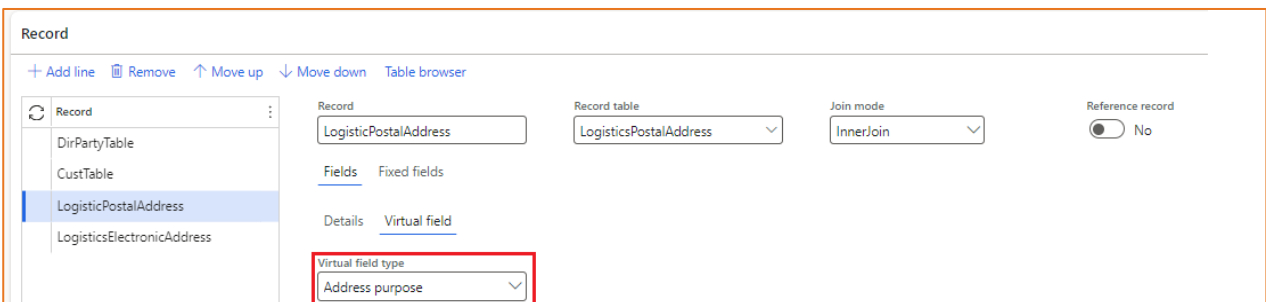


On the click of **Finish** button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

User can navigate to the individual fields and can remove the field(s) if needed.

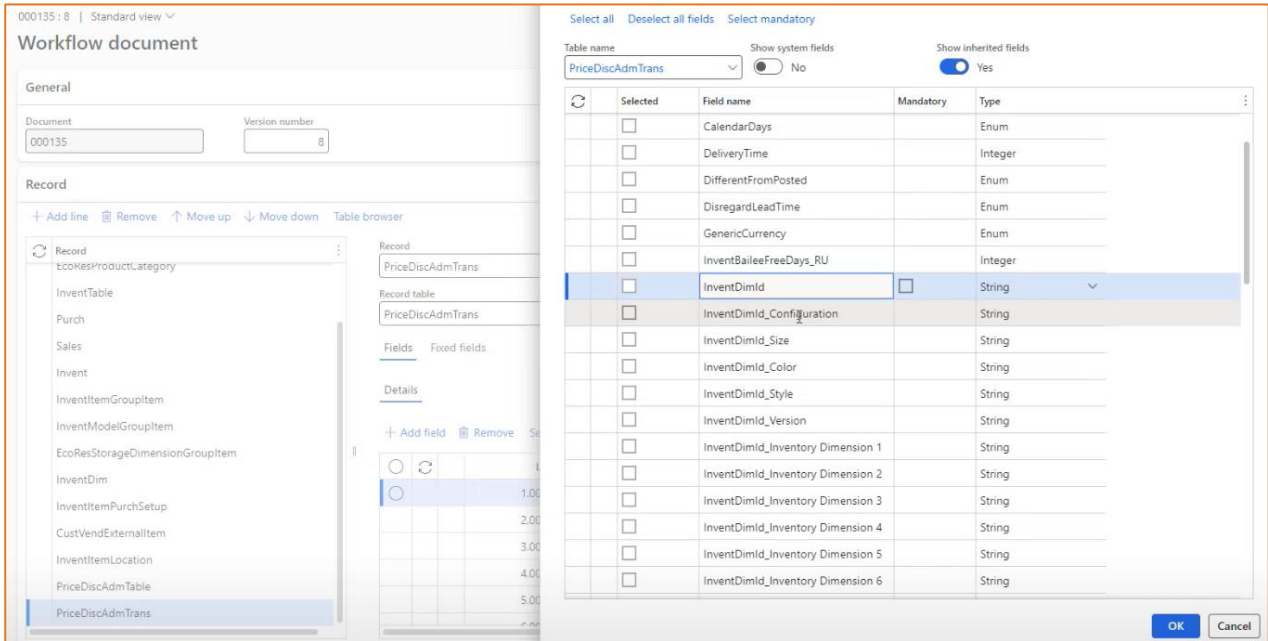
### 2.1.4 Add purpose selection for Addresses and contact information

The standard F&O application allows the user to specify the purpose for the address and contact information being specified. This enhancement will allow the data entry workflow user to configure the purpose field (As a virtual field) to specify the purpose field for the address and contact information.



## 2.1.5 Inventory dimensions as virtual fields in data entry workflow template

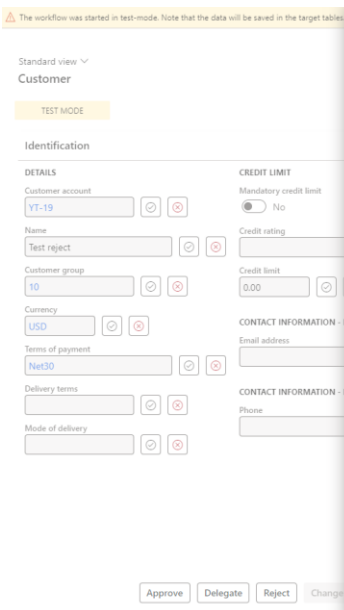
This enhancement will allow the user to select the inventory dimensions field while creating a workflow document for a record which has inventory dimensions.



While the workflow is being executed, the application will treat the inventory dimension field as virtual fields.

## 2.1.6 Reject and Delegate buttons change

Due to a breaking change in the way drop-dialogs work in 10.0.39 we had to switch our logic for our Delegate and Reject workflow buttons. When using these buttons, instead of opening a drop-dialog form, we are now using a standard dialog form to perform these operations. The rest of the functionality remained unchanged.



## 2.2 Version 10.0.38.13

### 2.2.1 Added support for DQS webservice configurable lookup

In the latest release of Data Quality Studio, a new feature has been introduced that allows a configurable lookup to be defined based on a webservice. The new way of executing the configurable lookup was not working correctly from Data entry workflow. Moreover, the existing configurable lookup options (Defined list & Dynamic query) stopped working as well.

In order to overcome these issues, we are now releasing a new version of Data entry workflow, along with a new version of Data Quality Studio that will solve the issues and make the webservice configurable lookup available in Data entry workflow as well.

## 3. Bug Fixes

### 3.1 Current release

ID	Title
184432	<p>New version Create with blank Template giving error while adding new fields in the template.</p> <p>This fix will ensure that while creating a new version using blank template, application should allow the user to create steps and select fields for steps.</p>
186403	<p>Approve label spelling is wrong for grid view.</p> <p>The spelling of “Approve” label was incorrect for grid on the approve steps. The spelling has been corrected.</p>
186565	<p>Selecting fields before Country/region field in the LogisticsPostalAddress table does not populate data correct on record.</p> <p>This fix ensures that while capturing the address details, the application must ensure that the address is saved regardless of the sequence of the field in the workflow template.</p>
187355	<p>The sequence does not appear the same in the DEW Instance as defined in the configuration lookup.</p> <p>This fix will ensure that the sequence for configuration look (User defined list) must be same as configured in the DQS application.</p>

### 3.2 10.0.38.13

ID	Title
	<p>Field values form cannot be opened if the workflow record name contains spaces.</p> <p>We have recently discovered that if document records are defined with spaces, the field values, as well as the grid control functionality is not working properly. We have solved the issue, yet we recommend defining the document records without a space in their name.</p>
	<p>Default values are not populated for specific enums and reference fields</p> <p>Solved the default values for reference fields. For enums, we have changed the default value lookup to show the technical name instead of the value.</p>



## 4. Common features

To-Increase is offering various add-on solutions. Some features and technical solutions are common or could be common for all our solutions on the Dynamics 365 Finance and Operations platform. As of November 2022, we will start leveraging a new common library model.

The common library model will be a centralized location where the new common features will be added automatically, and customers don't have to make an additional effort to update the build pipelines after the first enablement of this model.

ISV licensing is technically supported with a code signing certificate. The certificate we must use expires every three years, next up for renewal in 2023. Soon, our solutions will refer to this common model for the code signing certificate, instead of maintaining it separately in all our solutions.

Next to technical content, the common library comes with features which are beneficial to our customers. E.g. a Solutions Management dashboard gives a clear view of currently installed versions, status of license, option to renew licenses without any downtime, easy access to release notes and documentation, and the ability to leave feedback through the in-app feedback system.

Standard view ▾

### To-Increase solution management

All

Filter   Installed only

Solution	Installed version	Status
Advanced Discrete Manufacuri...		×
Advanced Project Management		×
Anywhere Mobility Studio		×
Business Integration Solution	10.0.99.999	☑
Data Entry Workflow		×
Data Modeling Studio		×
Data Quality Studio	10.0.18.2	🔄
DynaRent	10.0.28.43	🔄
PLM Integration for Engineerin...		×
RapidValue BPM Suite	10.0.26.37	☑
Security and Compliance Studio		×

#### Advanced Discrete Manufacturing

SOLUTION IS NOT INSTALLED

Solution description

Help manufacturers solve problems and streamline process flows.

License	Status	Expiry date
Construction	🔒	
Equipment	🔒	
Advanced Project Management	🔒	
Product Engineering a	🔒	

License description

On all To-Increase forms, there is on the left-top of the forms a smiley icon in the menu where you can provide us feedback, suggestions, and ideas so we can learn how improve our solutions.

?

### To-Increase would love your feedback!

Please rate your experience in using the All solutions screen.

- 5 - Excellent
- 4
- 3
- 2
- 1 - Poor

Please tell us why you chose the rating. Additional insights would help us improve our products further.

Thank you for providing us feedback!

Your privacy is important to us. To protect your privacy, please don't include any personal information.

Submit

Cancel

## 5. Known Issues and limitations.

In this section the known issues and limitations that are currently in DEW will be highlighted. These issues or limitations can also be due to standard Dynamics 365 limitations. Known issues and limitations:

- User can setup alerts as notifications. A data entity to continue with data outside of Dynamics 365 is not available yet.
- Diagram operations can sometime lead strange arrangement when complex scenarios are performed. If you ever get into a situation where the diagram is not looking correct, we suggest you remove the dependencies and then use Cut & Paste function to move the steps in the order that you prefer.
- Grid control has been released in Preview mode, which comes with some limitations:
  - We currently support 10 tables that can serve as grid data sources.
  - We can have fields from a single workflow document record in a grid.
  - We can only have 1 grid per Tab page.

We have items on the roadmap that will improve the product. If you want to learn about upcoming features, you can contact To-Increase.

In general, the Data Entry workflow can work for any regular table and field, regardless of if it is part of the standard, an ISV solution, customization or configured custom field. We have concentrated our testing on master data entry: Customers, (Released) Products, Vendor and Vendor bank accounts. We did test some other tables as well. If there is any specific behaviour which needs attention to get the recording or processing better for your scenarios, please contact us so we can improve the solution.

Together with the solution, we provide sample data entry workflow templates. The tutorials are provided 'as-is' and not supported as part of the main application. The examples are mainly intended for learning and demo purposes. Before using them in a production environment, you must verify if they will work as per your expectations.

Microsoft is continuously adding new features in the application directly and via Feature Management. Sometimes these are public preview and will be made generally available in future releases, in other cases, they are already general available, and you have the choice to activate them. Currently, we are not testing compatibility with all new features or combinations. Once a feature is enabled at the customer environment and in case of any issues or questions related to new standard features and our solutions, kindly contact us via To-Increase support.