Release Notes for Data Entry Workflow 10.0.43.20

Release Notes

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Document Information

Title	Release Notes for Data Entry Workflow 10.0.43.20
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Solution Suite	DEW; Data Entry Workflows
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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) 10.0.43.20 from Staedean B.V. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Supply Chain Management, 10.0.40 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 Supply Chain Management is assumed.

1.3 Deliverables

Deliverable	Description
Solution package	Data Entry Workflow is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Data Entry Workflow 10.0.43.20
Release notes	This document is provided with the Data Entry Workflow product deliverables.
Implementation methodology	The solution package contains a *Data Entry Workflow implementation methodology* that provides detailed step-by-step instructions on how to install, learn, and implement the solution.
Getting started BPM library	The solution package includes a *Getting started with Data Entry Workflow* BPM library. This library contains several task guides that showcase some of the key capabilities of Data Entry Workflow.
Documentation BPM library	We are working on the documentation for *Data Entry Workflow*. This is not published as BPM library on the moment of this release.
Authentication assets	A STAEDEAN 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 10.0.43.20 for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version 10.0.40. 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 10.0.40 or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version 10.0.43, we recommend applying our Staedean 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	Staedean Version No.	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
25/10/2024	10.0.41.17	10.0.37	10.0.41	10.0.37 and above
09/12/2024	10.0.41.18	10.0.37	10.0.41	10.0.37 and above
11/02/2025	10.0.42.19	10.0.39	10.0.42	10.0.39 and above
08/04/2025	10.0.43.20	10.0.40	10.0.43	10.0.40 and above

In case of an Error, Staedean may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. Staedean 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 - Staedean

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?
- Please go to the Solution Management Workspace in your F&SCM environment

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@staedean.com

2. What's New

2.1 Release 10.0.43.20

2.1.1 Ability to amend data at approval step

This enhancement allows users to modify data within the Approval Step of the workflow. Previously, users were only able to approve, reject, delegate, or request changes at the approval stage without making direct modifications to the populated fields. With this update, users now have the capability to edit specific details before completing the approval process, reducing unnecessary rework and improving workflow efficiency.

A new "Allowed to Update" toggle button has been introduced in the workflow configuration settings to provide flexibility.

- The toggle is defaulted to "No", meaning that by default, users will not be allowed to amend details at the approval step.
- It is displayed only when the step type is set to "Approval", ensuring that editing capabilities are limited to relevant workflow stages.
- When set to "Yes", the assignee of the approval step will be able to modify specific fields within the workflow before approving or taking any other action.

When a user reaches the Approval Step in the DEW instance and the "Allowed to Update" option is enabled, they will be able to:

- Edit data fields within the Approval Tab before completing the approval process.
- Approve the workflow with the amended details without requiring a separate change request.
- Delegate the approval to another user if required.
- Reject the request if the information does not meet the necessary criteria.
- Request changes if additional modifications are needed from the data entry step instead of making edits directly.

The Amend on Approval Step enhancement in Data Entry Workflow (DEW) improves process agility by allowing direct modifications within the approval step when configured. Organizations can enable this feature in the template as needed, ensuring that approval workflows are both efficient and controlled.

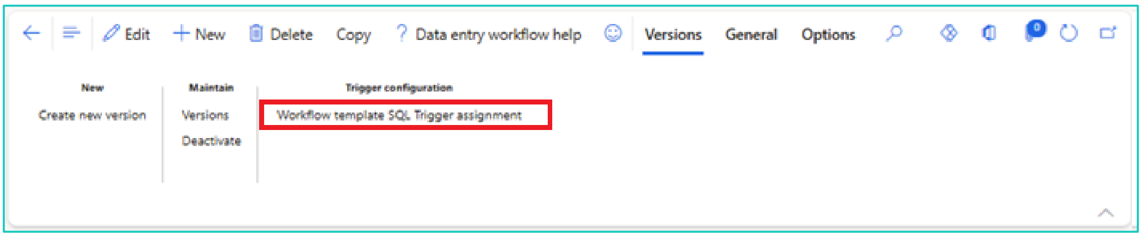
2.1.2 Workflow Instance Trigger

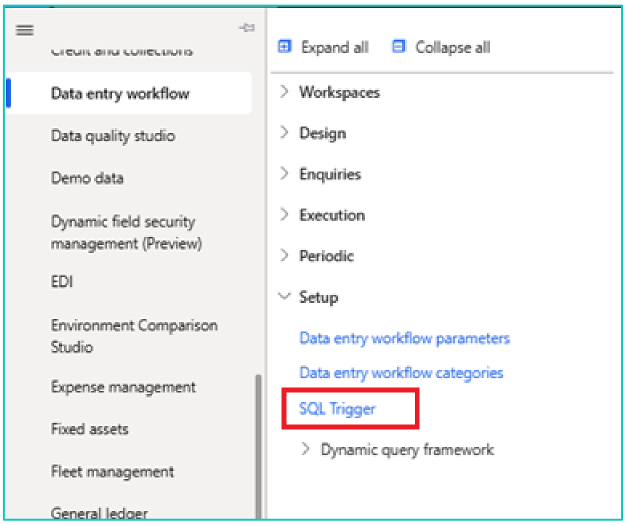
This enhancement allows application to automatically trigger a workflow instance whenever a record is created or modified within the application. This feature is particularly useful when integrating data from third-party applications into Dynamics 365, ensuring that any new or updated records automatically initiate a workflow for validation and further modification.

- The application now allows users to configure SQL triggers that activate a workflow instance when a record is inserted or updated in the system.
- This is particularly beneficial for scenarios where data is imported into Dynamics 365 using a third-party integration, ensuring that imported data goes through a structured validation process.
- Once a workflow instance is triggered for a record, users can review and modify details before final approval.

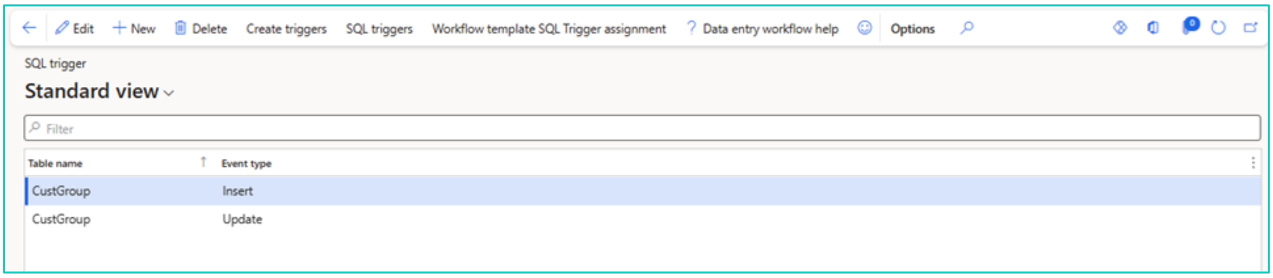
To enable this feature, users need to define a workflow template and configure SQL triggers for the desired table and event type.

- A new option "SQL Triggers" has been added to the Data Entry Workflow Template Designer page or it can be accessed from the SQL Trigger option under Setup section.





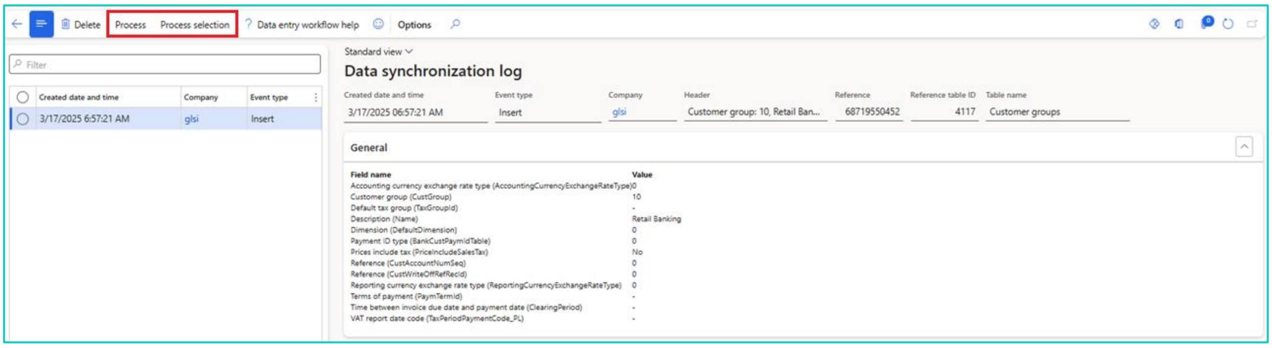
- Users can configure triggers for:
  - Insert: Triggered when a new record is created.
  - Update: Triggered when an existing record is modified.
- Users can also assign workflow templates to triggers, ensuring that different workflows are used based on specific conditions.
- The system allows the definition of query conditions, enabling different workflow templates based on field values (e.g., different workflows for organization-type customers vs. person-type customers).



- Once the trigger is defined, users must click on "Create Trigger", which synchronizes the setup in the system and ensures that the SQL trigger is registered in the database.
- On click of “SQL Triggers” button, you will be able to view the SQL triggers at database level.

Once the SQL trigger is set up, the workflow instance will be automatically created when the corresponding event occurs.

- After a record is inserted or updated, users can navigate to Data Synchronization Logs to view newly created workflow instances.
- The triggered workflow instance can be processed from the log page by clicking on the Process or Process selection button, initiating the standard DEW workflow.



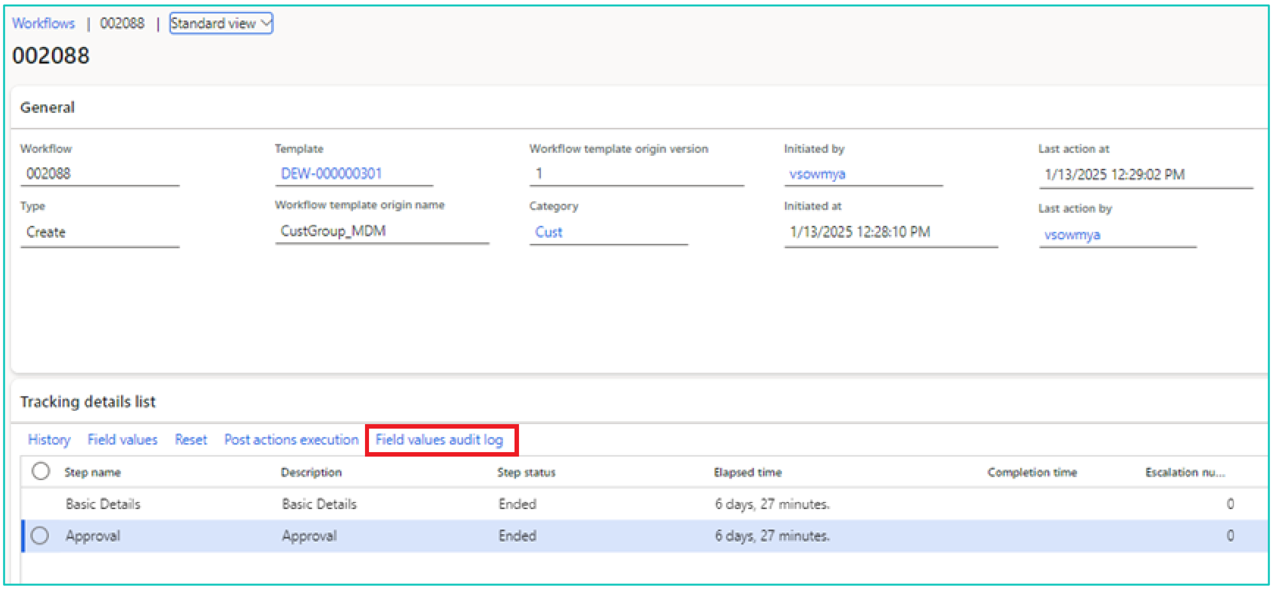
- The workflow instance will appear in the Data Entry Workflow Management Workspace, where users can review and modify record details.
- If the workflow includes an approval step, changes will only reflect in the system after final approval.

This feature enhances data governance and control by ensuring that all records, whether created manually or imported from external sources, go through an automated validation and approval process before being finalized.

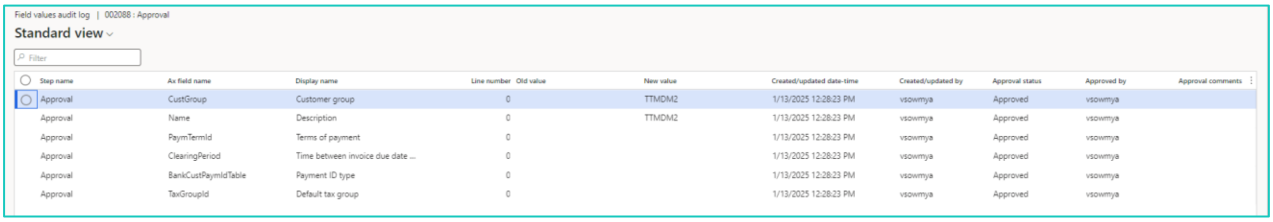
2.2 Release 10.0.42.19

2.2.1 Workflow instance-Audit Log History

This enhancement allows users to view comprehensive audit logs for each field within a workflow instance, providing greater transparency and traceability. Users can access a detailed audit log for each field within a workflow instance. The audit log can be accessed with a single click on the "Field Value Audit Log" button.



The audit log displays the step name, field name, display name, line number, old value, new value, created/updated datetime, Approval status, Approved By and Approval comments. The old value will appear blank if the field is being populated for the first time. For modified records, both the old and new values will be displayed.



Users can export the audit log data to an Excel file using the standard export feature of the F&SCM application.

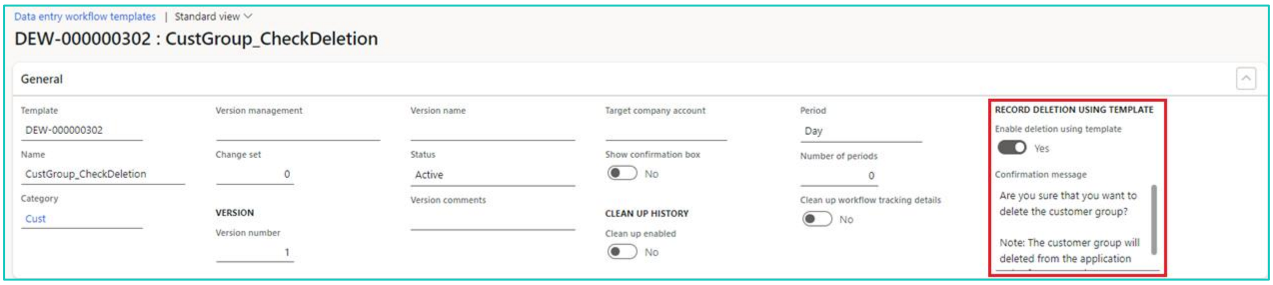
This new feature enhances transparency by providing a clear view of all changes made to each field, ensuring accountability. It improves traceability by making it easy to track and review the history of data modifications. Additionally, it simplifies the process of auditing and reviewing data changes within workflow instances.

2.2.2 Workflow for record deletion

This enhancement will allow the DEW admin to configure a workflow to delete records in the application using the data entry workflow template.

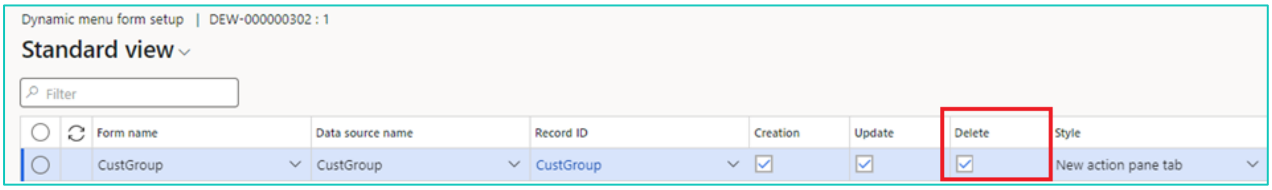
On the *Data entry workflow* page, General section, a new field group *Record deletion using template* has been added. This group has two fields:

- Enable deletion using template: This is a toggle button, defaulted to No. If the value of this field is changed to Yes, then the template can be used for the deletion of record.
- Configuration message: This is a free text field that allows the user to specify the error message that should appear when the user initiates the deletion of record using the template or while approving the deletion of the record. This field is mandatory if the *Enable deletion using template* field is marked as Yes.

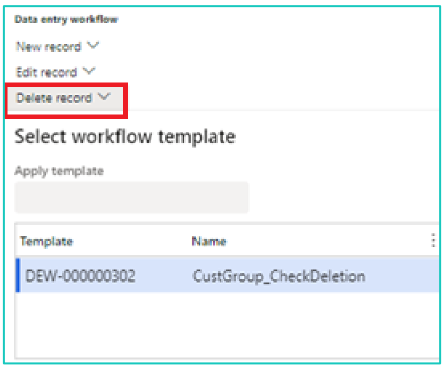


Additionally, users can configure which steps should be shown during deletion using the *Show for deletion* toggle button on the Step Details fast-tab. By default, the first step is always shown, but users can choose to display or hide other steps as needed.

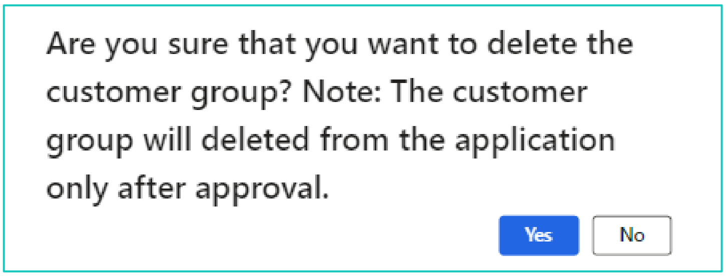
In the dynamic menu form setup, a new deletion option has been introduced alongside the existing options to create or update records. Once the template is activated, users can delete records by selecting the appropriate template and following the prompts.



To delete a record, users go to the data entry workflow, select "delete record," and choose the template.



The application will prompt for confirmation and will check for any dependencies before initiating the instance for the deletion of the record.



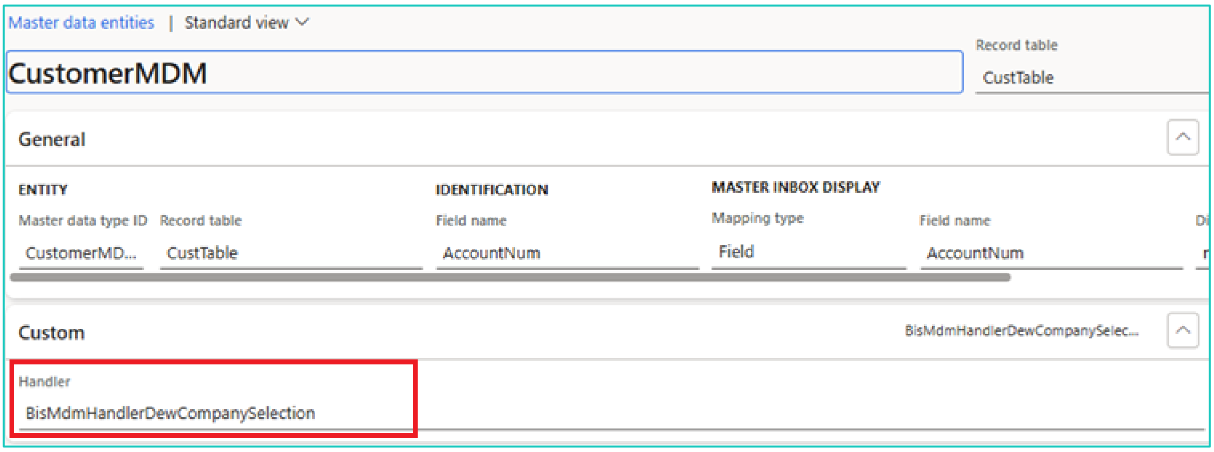
The application will check for dependencies and other conditions that might prevent deletion. If the record can be deleted, the user can proceed to the data entry workflow management page to approve the deletion. The approval step includes options to approve, delegate, or reject the deletion. Once approved, the record is permanently deleted from the application.

This new functionality provides the maker checker control for the deletion of records in the application with proper approval process in place.

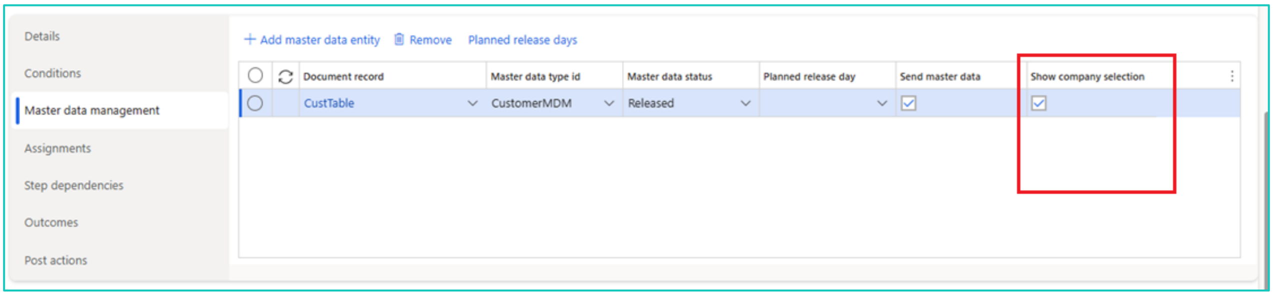
2.2.3 Legal entity selection for MDM distribution

This enhancement will allow the user to select the legal entities or companies where the data should be copied once it is approved. This enhancement provides greater flexibility and control over data management across multiple entities.

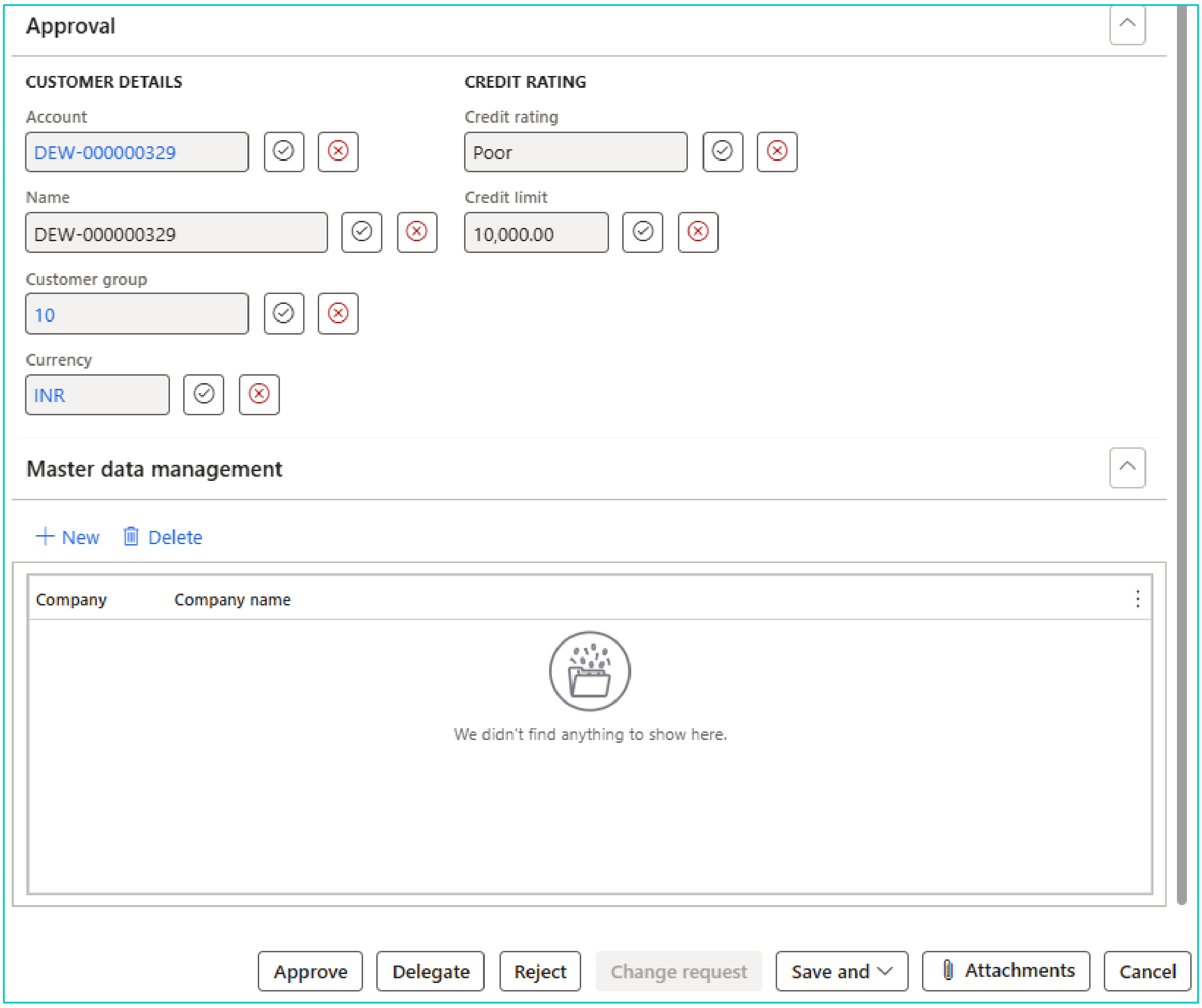
To configure this feature, ensure that the handler specified in the master data management application is set to ***BisMdmHandlerDewCompanySelection***. This configuration is essential for enabling the new feature in the data entry workflow template.



Additionally, In the approval step 's Master Data Management fast tab, a new column, "Show Company Selection," has been added as a checkbox. If this checkbox is unchecked, the data will be copied to all companies specified in the master data entity once approved. If the checkbox is checked, the application will prompt the user to select the specific master data entities where the data should be copied.



To use this feature, navigate to the Data Entry Workflow Management page and start a new instance. On the approval step, application will allow the user to select the company. For example: If the target company is selected as DEMF then, the data will be copied to the DEMF company only if all the master data (used in the record) are available in the target company. If the required master data records are not available in the target company, the application will display a message indicating that no records were created.



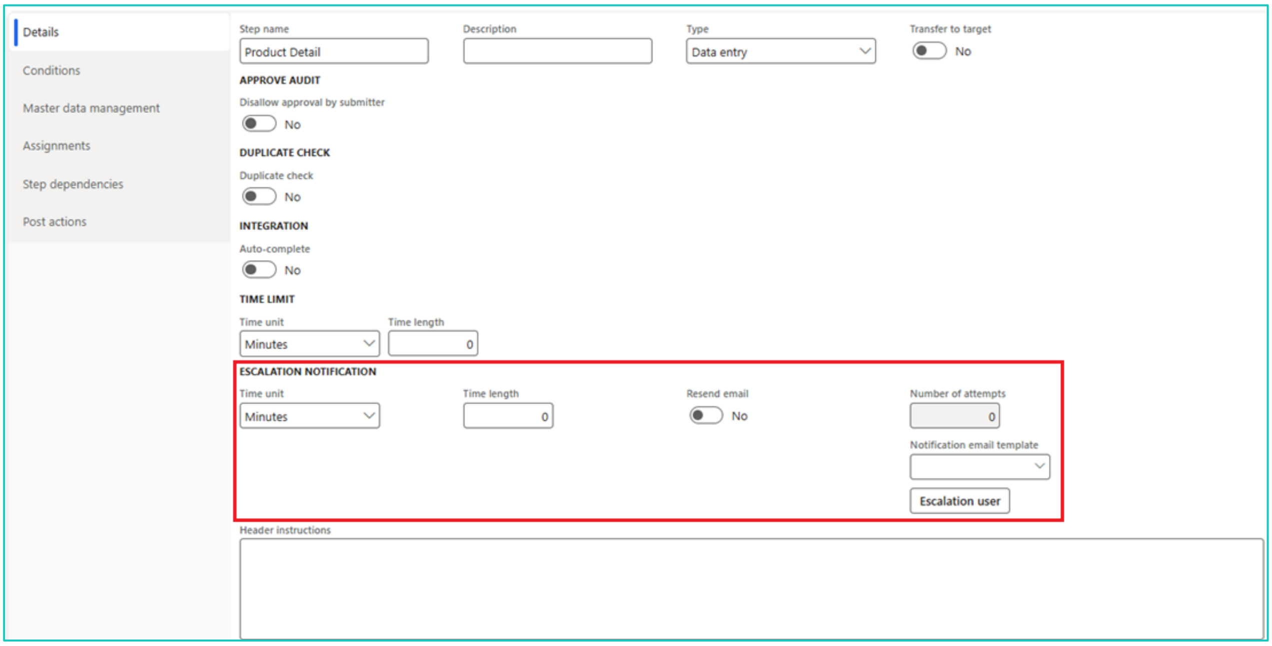
This feature enhances data management by allowing selective copying of data to specified entities, ensuring data consistency and accuracy across the organization.

2.2.4 Escalation email notification

This enhancement ensures timely action on assigned tasks by sending notifications if a particular step is not completed within a specified time frame.

In the Data Entry Workflow Template section, each step now includes an ***Escalation notification*** group in the details fast tab. Below are the fields in this group:

- **Time Unit:** Specify the unit of time (e.g., minutes, hours, days) for the escalation trigger.
- **Time Length:** Define the length of time after which the escalation email should be sent.
- **Resend Email:** Set this field to "Yes" to enable recurring escalation notifications.
- **Number of Attempts:** Specify the number of times the escalation email should be resent.
- **Notification Email Template:** Select the email template to be used for the escalation notifications.
- **Escalation User:** Add additional users who should receive the escalation email notifications. These users will be CCed in the email notification.



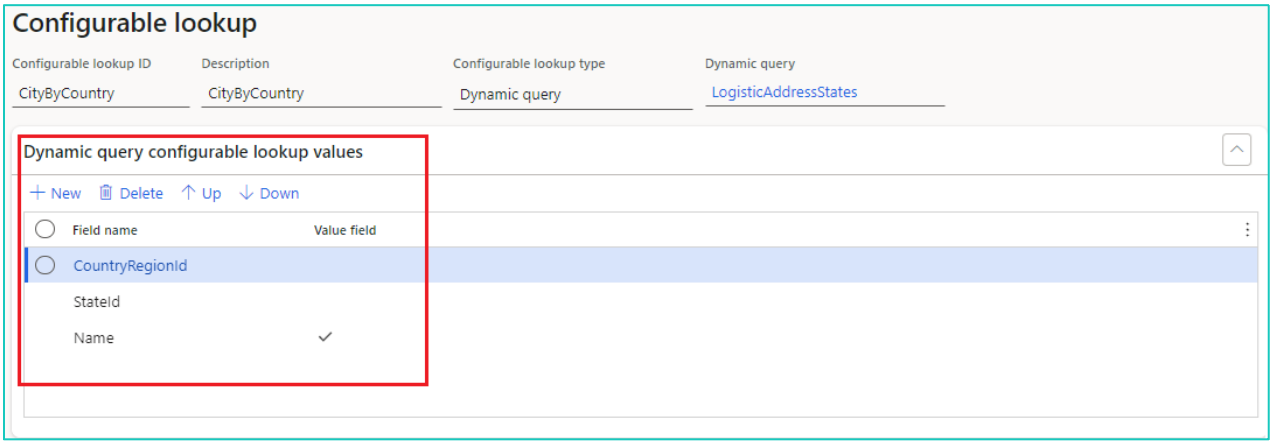
Notification email templates can be defined in the System Administration section under Email Setup. The list of templates specified here will be available in a dropdown menu for selection in the escalation notification setup.

If the assigned step is not started within the given time length, the application will trigger the email notification. If the resend email is enabled, and the step is not started even after the first notification, then application will resend the email notification again.

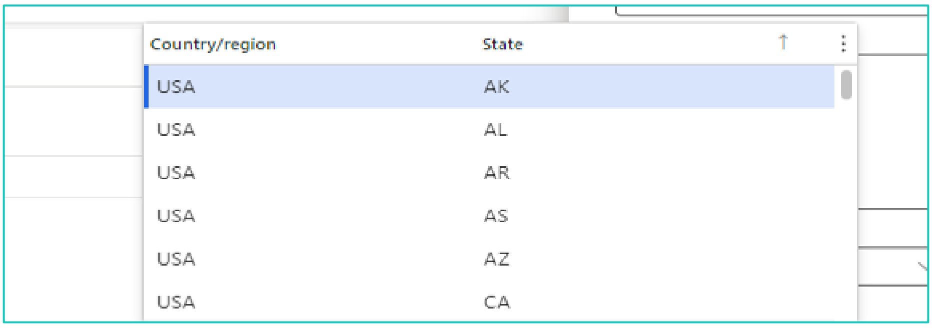
2.2.5 Data quality studio configurable lookup extension to data entry workflow

This enhancement allows the users to use the configurable lookups, that are configured in Data quality studio, to be used in data entry workflow as well. This feature ensures the data quality for the data being captured using data entry workflow by ensuring that dropdowns are populated based on the selected values, improving data accuracy and user experience.

We need to ensure that the configurable lookup is defined in the data quality studio, where user can specify the fields that must appear in the drop-down menu and can specify the value field as well.

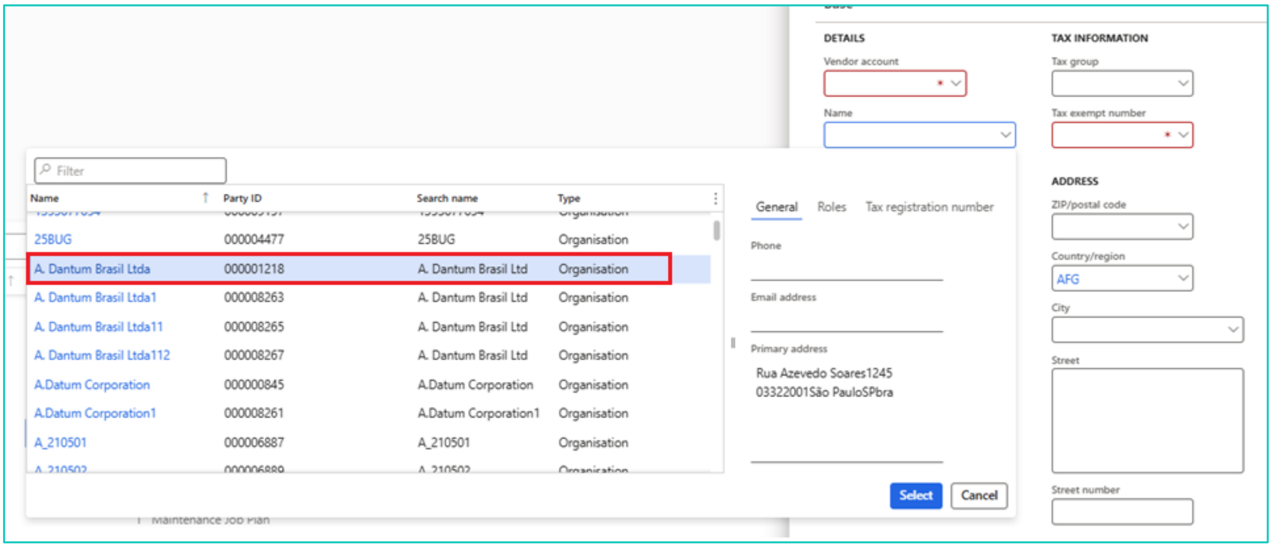


If the data quality policy which is using the configurable lookup in active and is enabled to be used in data entry workflow, then while capturing the data in the data entry workflow, application will populate the drop-down field based on the fields configured in the configurable lookup.

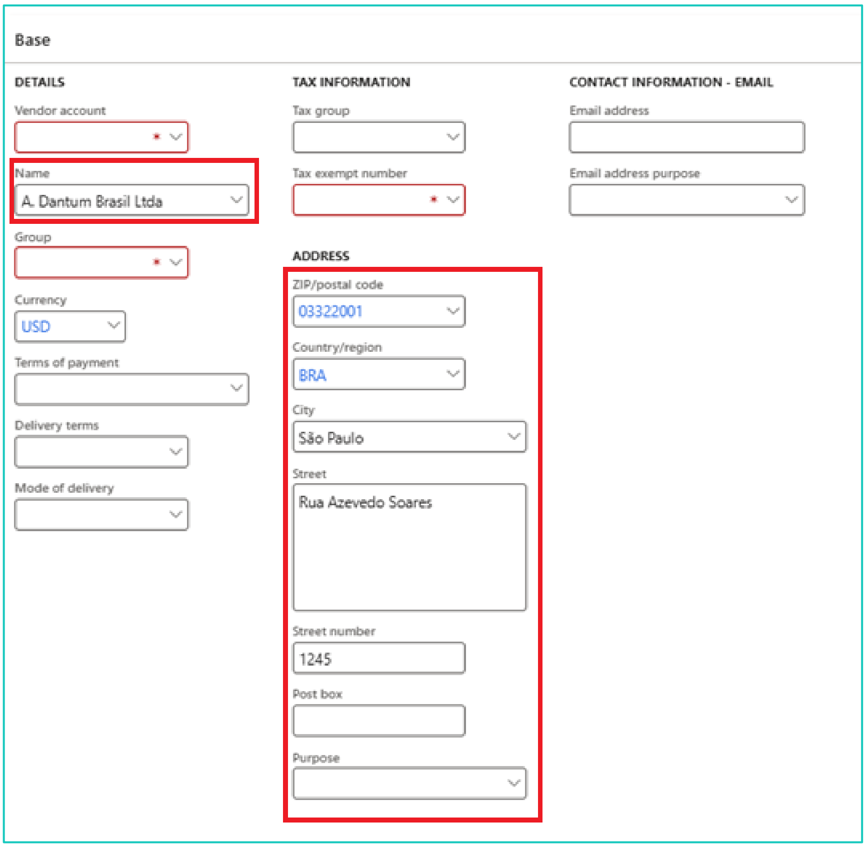


2.2.6 Copy vendor and customer details

This enhancement in the data entry workflow, aimed at simplifying the process of populating vendor details and customer details by selecting an existing party in the application. This feature, though modest in scope, is designed to save time and effort when creating vendor or customers.
When creating a new vendor or customer, users can now select a party from the list of pre-configured parties within the application.



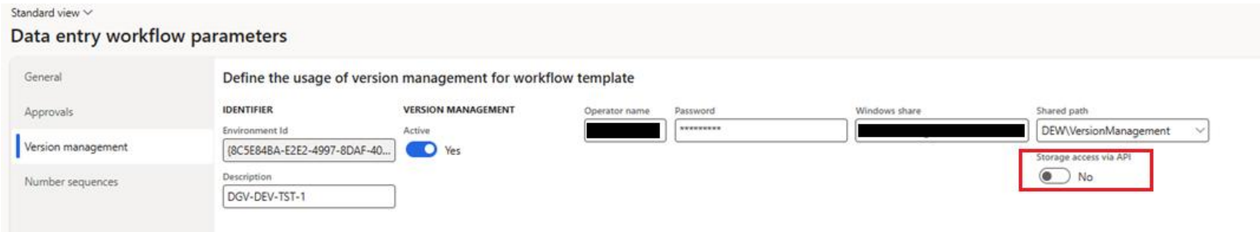
The system will automatically populate the vendor's name, and address details.



This enhancement significantly reduces the time required to enter basic vendor details by enabling the copying of information from an existing vendor. By selecting a vendor and clicking the "Select" button, the application will auto-fill the relevant fields, ensuring accuracy and consistency in the data entry process.
This enhancement will greatly improve workflow efficiency and streamline the data entry process.

2.2.7 Version Management Enhancement

On the *Version Management* fast-tab, a new field *Storage access via API.* If this option is enabled, then application will use API for the Azure file storage connection.



2.3 Release 10.0.41.17

No new features.

2.4 Release 10.0.41.16

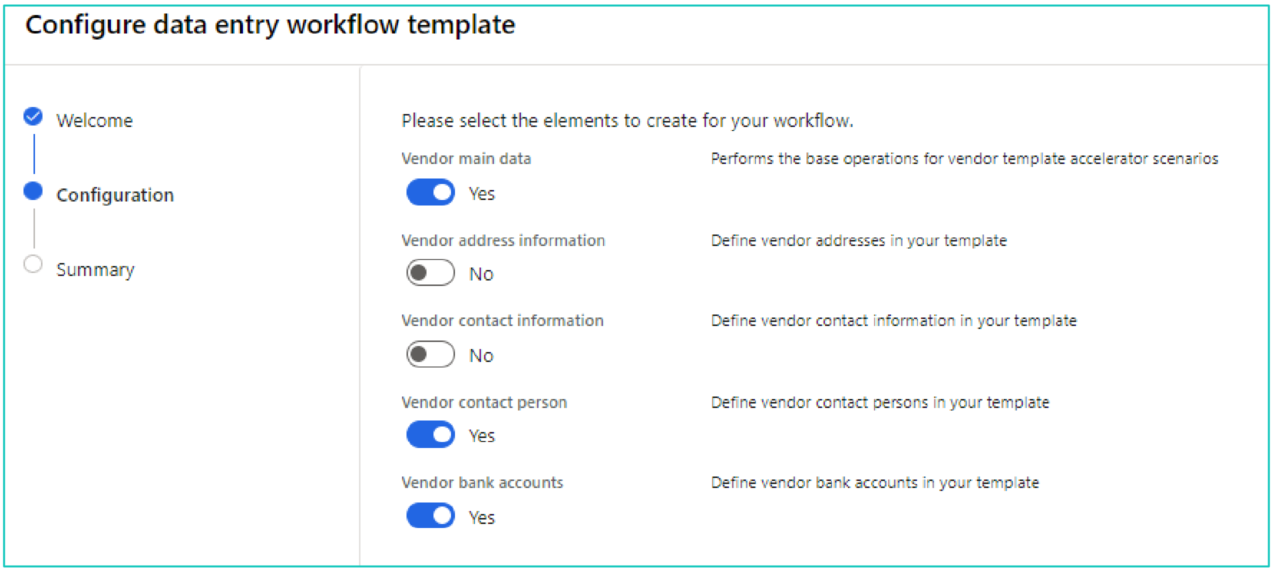
2.4.1 Vendor template design accelerator follow-up enhancement

As per the current implementation of data entry workflow, a user can define the following elements in a vendor template using template accelerator framework:

- Vendor main data
- Vendor's address information
- Vendor's contact information

This enhancement will allow a data entry workflow user to also define the following elements as well:

- Vendor Contact Person
- Bank Accounts



For the *Contact person*, application allows the user to select from the following information:

1. General
2. Phone
3. Email
4. Fax and,
5. Address

For the *Bank Details*, application allows the user to enable bank details in the template.

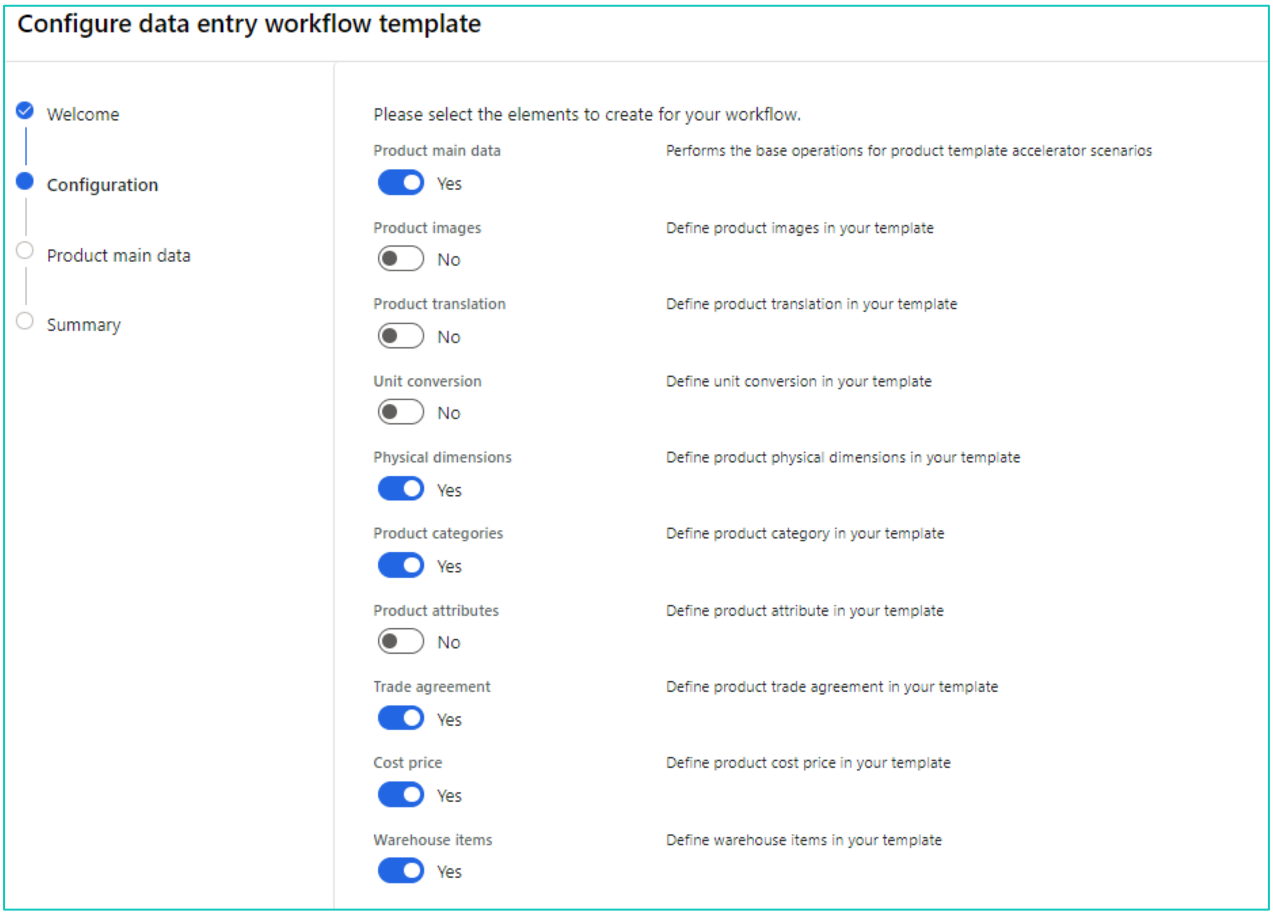
2.4.2 Product template design accelerator follow-up enhancement

As per the current implementation of data entry workflow, a user can define the following elements in a vendor template using template accelerator framework:

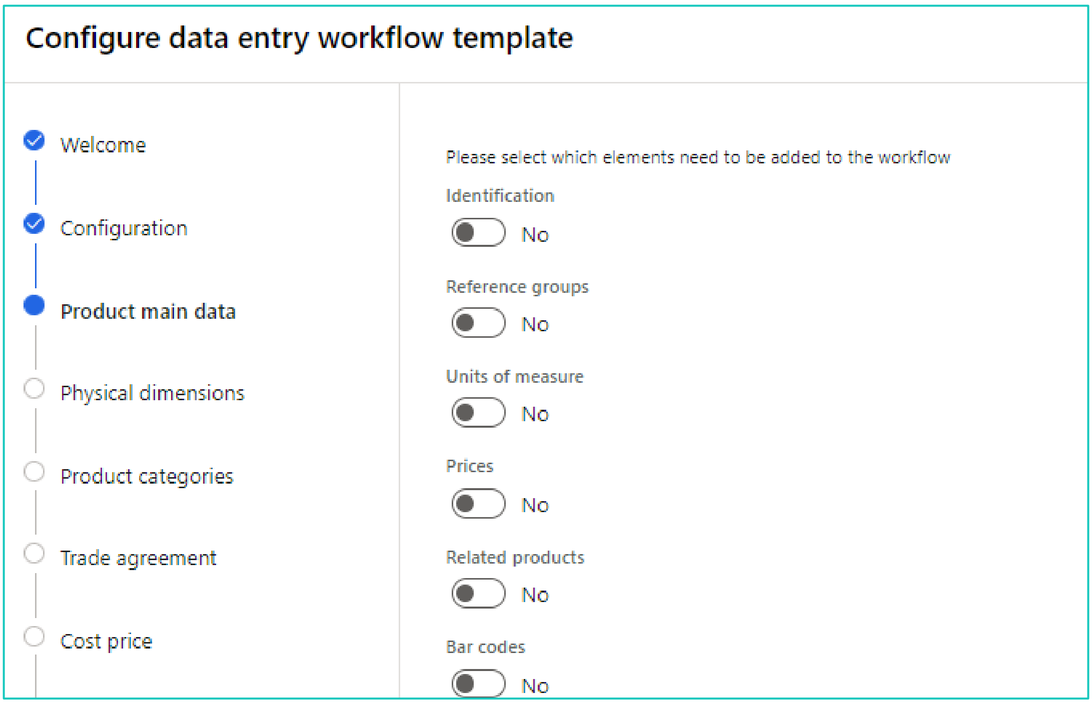
- Product Main data
- Product image
- Product translation
- Unit Conversions
- Product attributes

This enhancement will allow a data entry workflow user to also define the following elements as well:

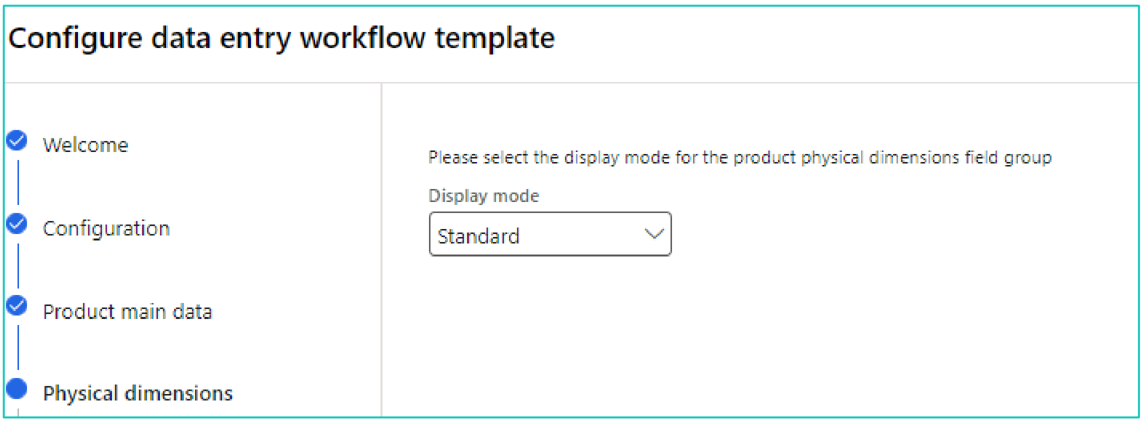
- Trade agreement
- Cost price
- Product categories
- Warehouse Items
- Physical dimensions
- Related Products
- Item Barcode



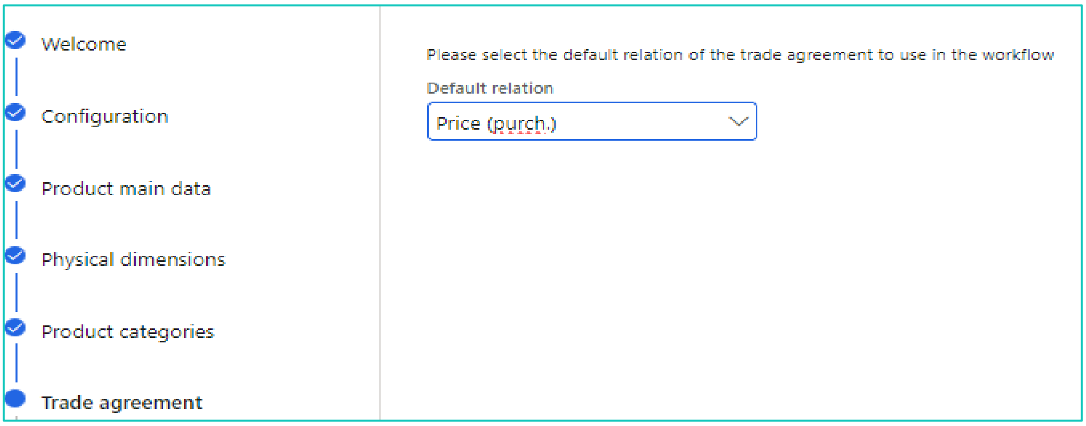
Related Products and Bar Codes are available in Product Main Data section.



For *Physical dimension, Cost Price,* and *Product Categories*, application allows the user to select the display mode from the following options: Standard and Grid.

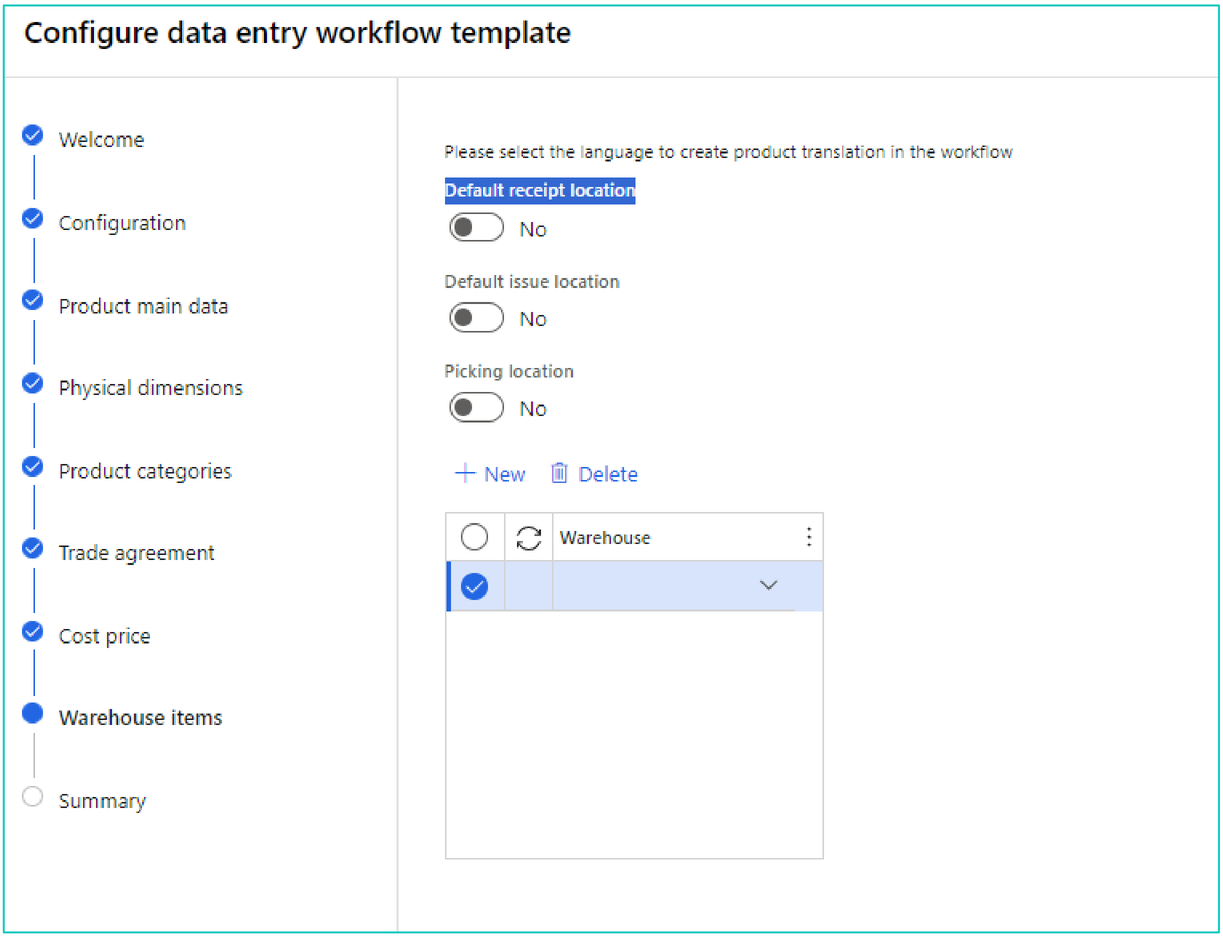


For *Trade agreement*, application allows the user to select the default relations.



For the *Warehouse Items*, application allows the user to enable the following information in the template:

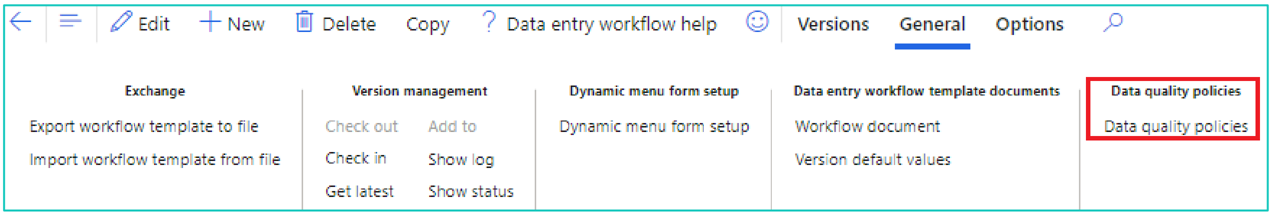
- Default receipt location
- Default issue location
- Picking location
- Select Warehouses



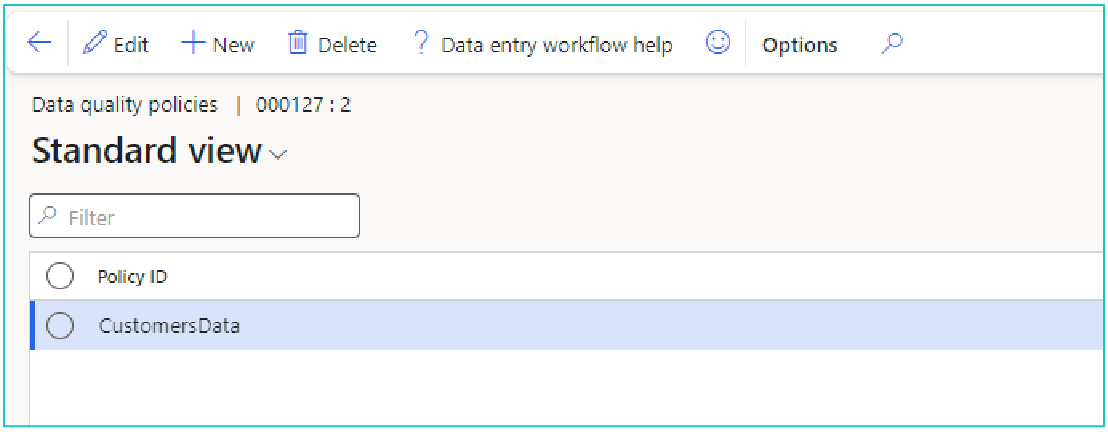
2.4.3 Ability to limit data quality policy for Workflow Templates

This enhancement will be applicable only if the Data quality studio is also installed on the F&SCM instance. As per the current implementation of data entry workflow, if data quality policies are configured to be executed for the Data entry workflow templates, then all the active data quality policies will be applicable on the data entry workflow as well.

This enhancement will allow the template designer to select the data quality policies which must be applicable on a data entry workflow template. In the *General* action tab, a new option *Data quality policy* has been added.



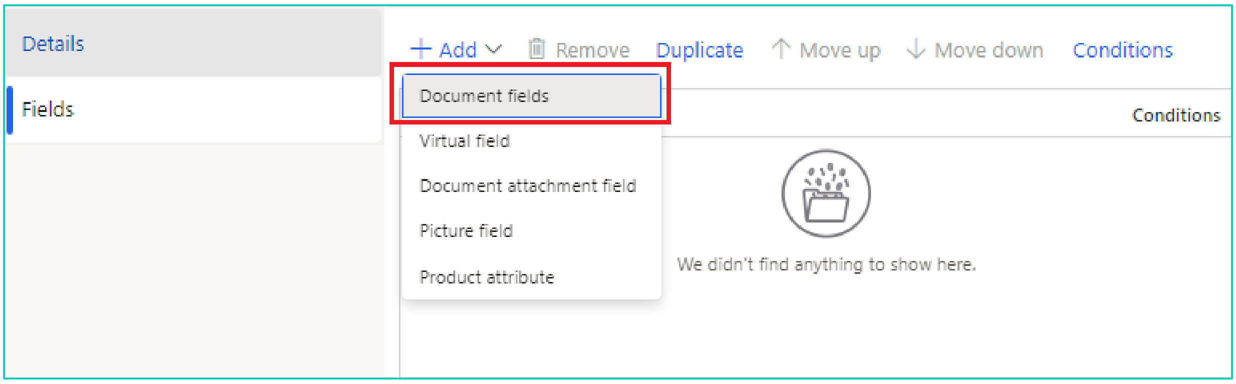
On clicking *Data quality policy,* application will prompt a pop-up which will allow the user to specify the data quality policies that must be applicable while creating or editing a record using the workflow template.



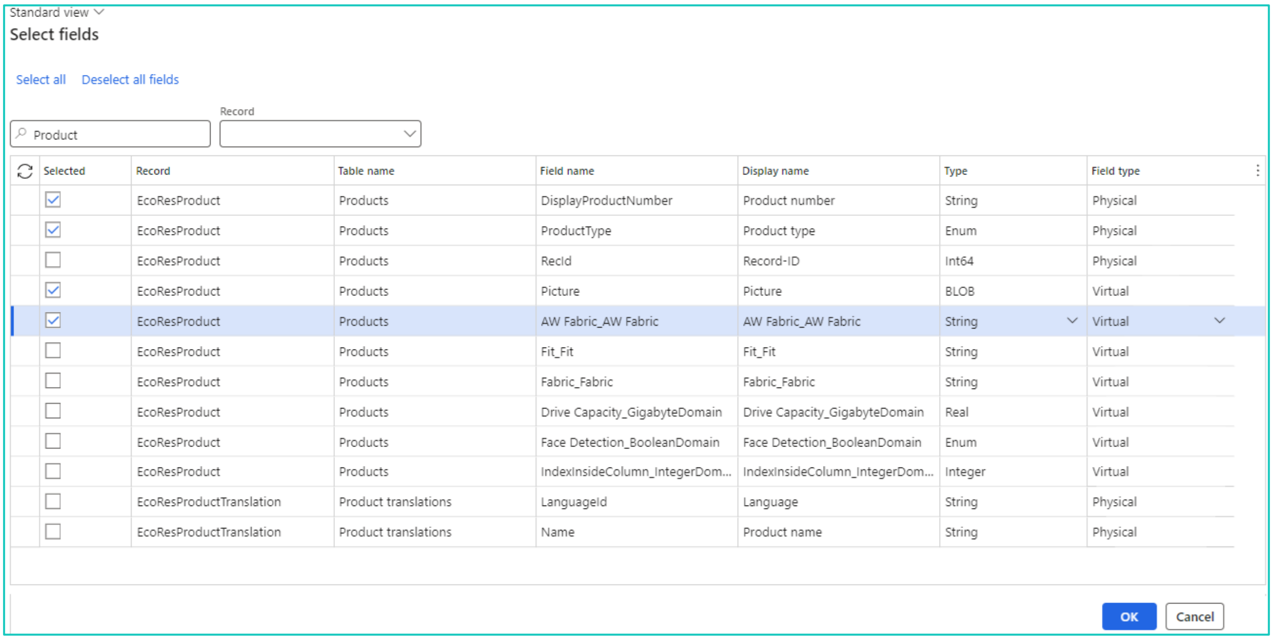
This pop-up will allow the user to add the data quality policies by clicking on New button. To delete an existing data quality policy, user need to select the data quality policy and click on Delete button.

2.4.4 Ability to select multiple fields from documents

This enhancement will allow the user to select the multiple fields from a document at once. The existing option '*Add field from document*', which allows the user to select one field at a time has been replaced with *Document fields* option.



On clicking Document fields button, application will prompt a pop-up that will allow the user to select multiple documents.

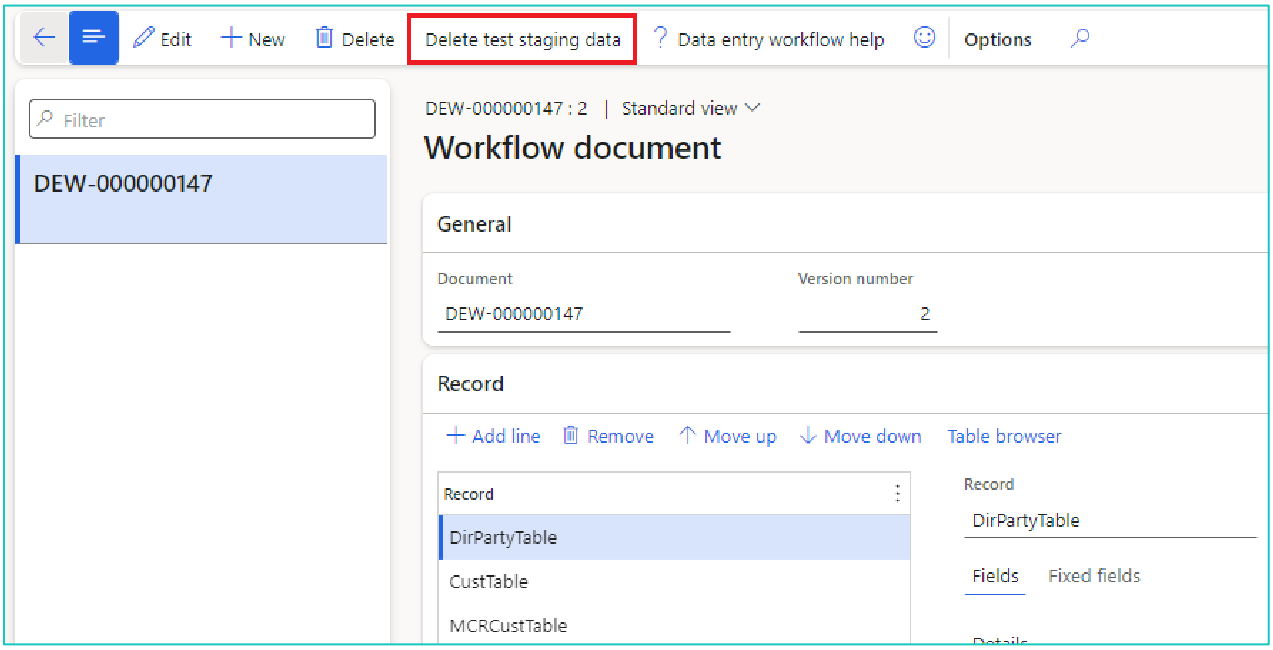


On click of OK button, the selected field will be added to the fields grid.

2.4.5 Ability to delete test staging data

As per the current implementation of the Data entry workflow, user cannot delete a workflow document if it has any test 0taging data (Data created while the template is activated in test mode).

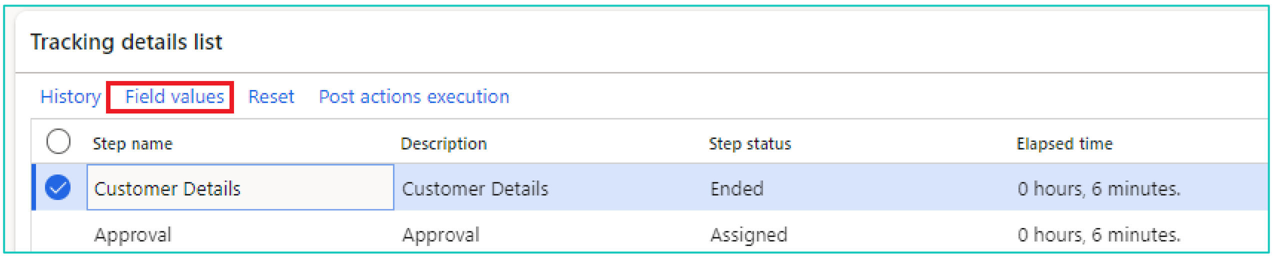
This enhancement will allow the user to delete the test staging data for a selected document. A new button named, *Delete test staging data,* has been added on the Workflow document page.



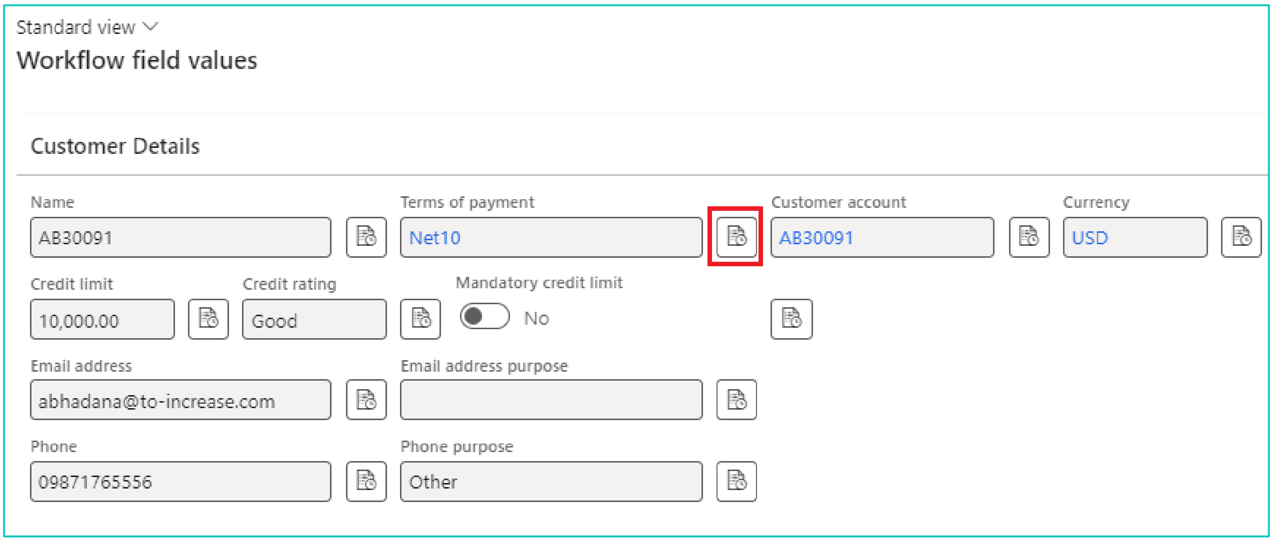
On the click of this button, application will delete the test data related to the selected document.

2.4.6 Ability to modify test staging data

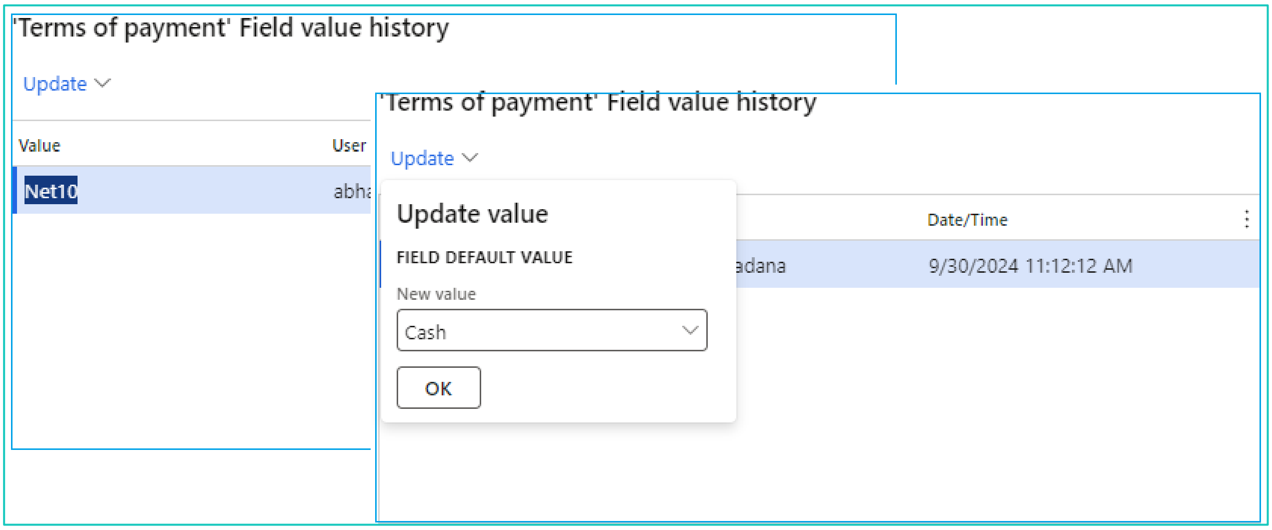
As per the current implementation of the Data entry workflow, application allow a user to view the Fields value of a step by clicking on the *Field values* button available on the Tracking details list grid of the Workflow page.



On clicking *Field values* button, application prompts a pop-up that allows the user to view the value of fields in the workflow instance. User can also view the history by clicking on the *View history* icon.



On clicking the *View history* icon, application will populate the history of the changes made for the field. There will be an additional button, ***Update***, that will allow the user to update the value of the field.



2.5 Release 10.0.40.15

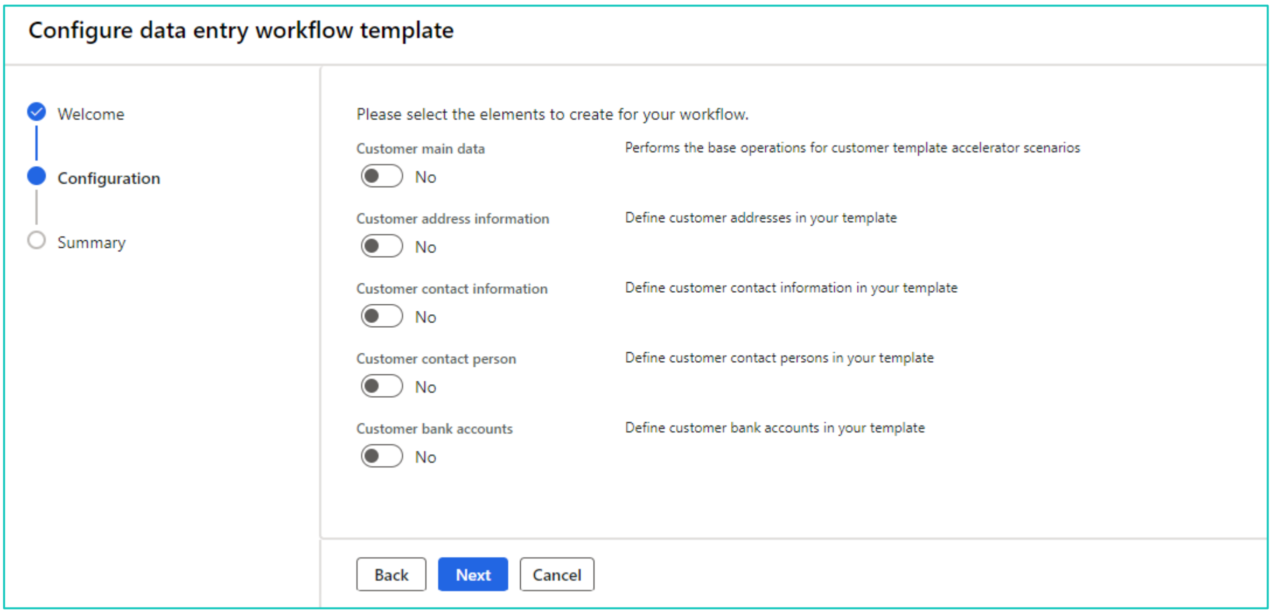
2.5.1 Customer template design accelerator follow-up enhancement

As per the current implementation of data entry workflow, a user can define the following elements in a customer template using template accelerator framework:

- Customer Main Data
- Address Information
- Contact Information

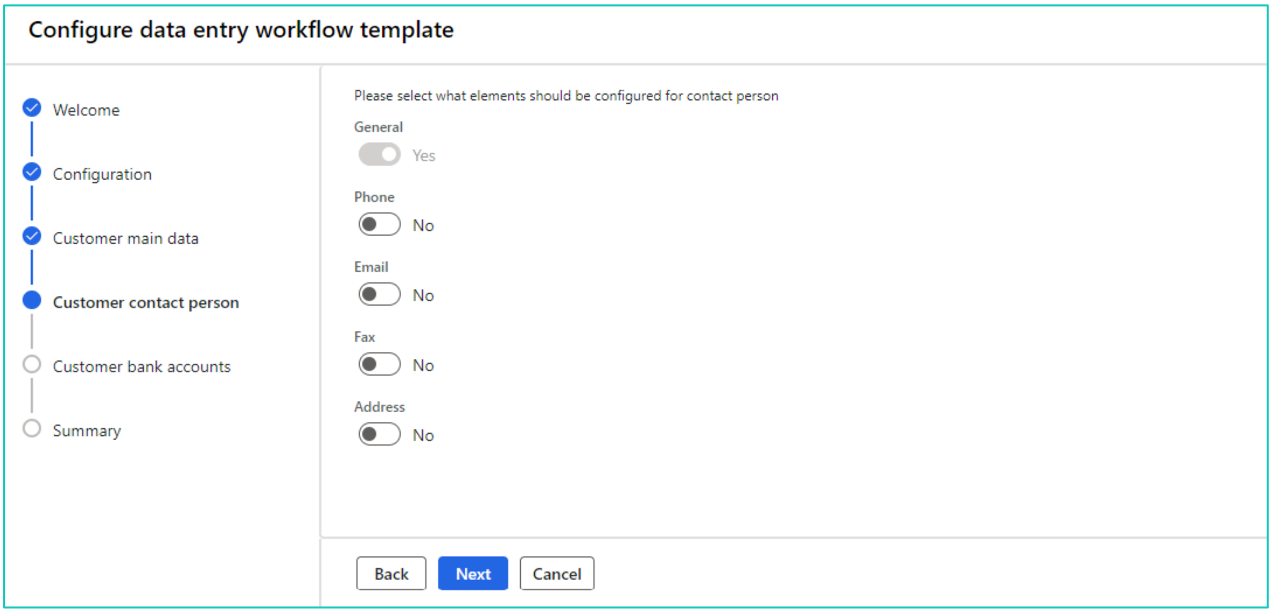
This enhancement will allow a data entry workflow user to also define the following elements as well:

- Customer Contact Person
- Customer Bank Accounts



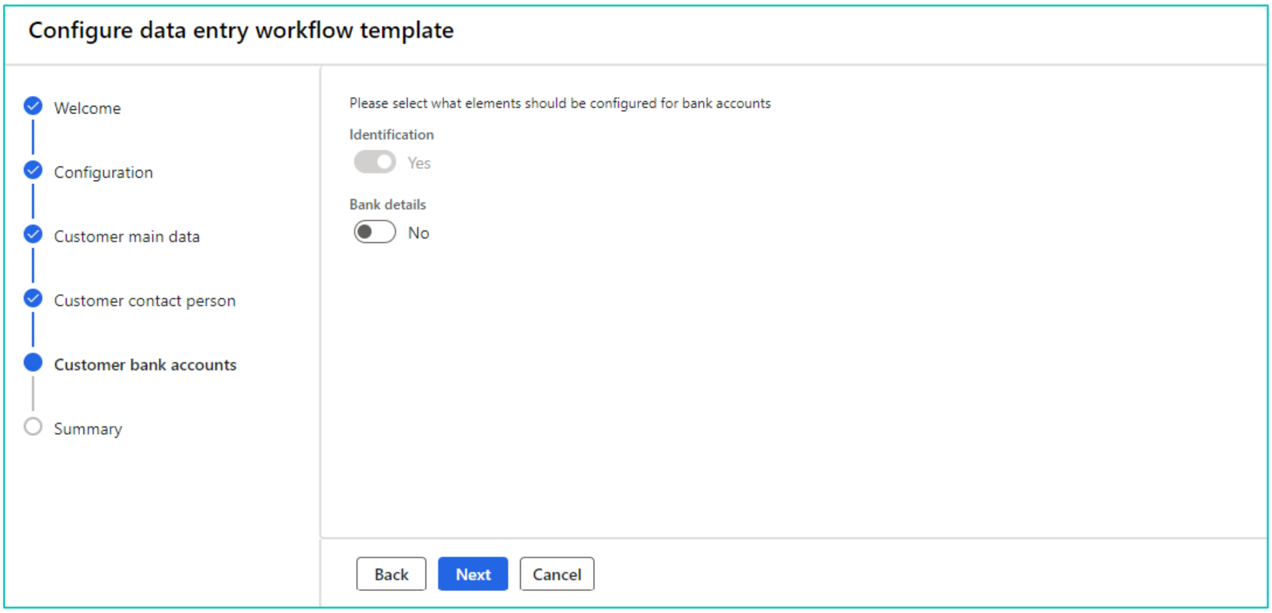
For the *Contact person*, application allows the user to select from the following information:

1. General
2. Phone
3. Email
4. Fax and,
5. Address



For the *Bank account*, application allows the user to select from the following information:

1. Identification and,
2. Bank details



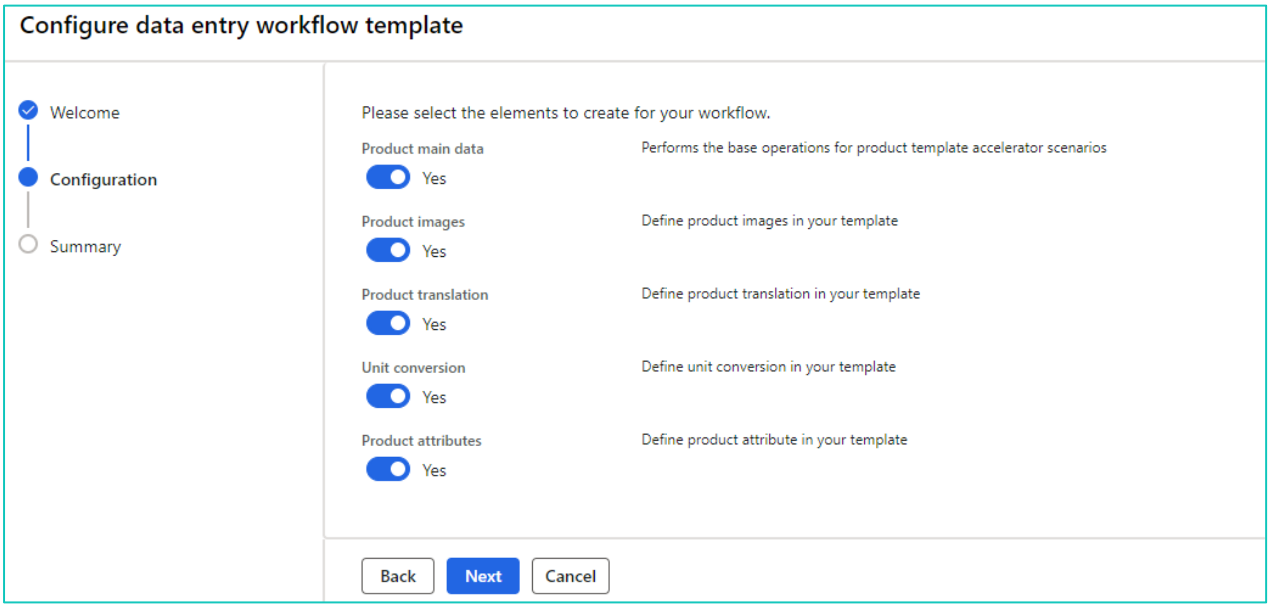
2.5.2 Product template design accelerator follow-up enhancement

As per the current implementation of data entry workflow, a user can define the following elements in a product template using template accelerator framework:

- Product Main Data

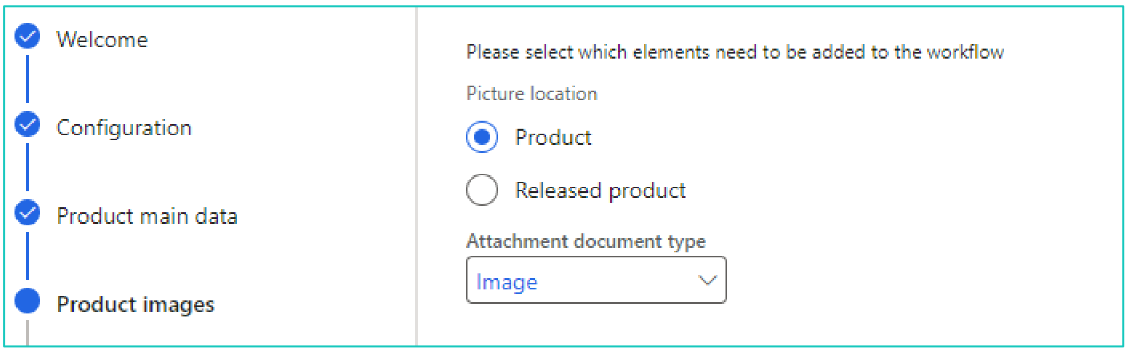
This enhancement will allow a data entry workflow user to define these new elements as well:

- Product image
- Product translation
- Unit Conversions
- Product attributes

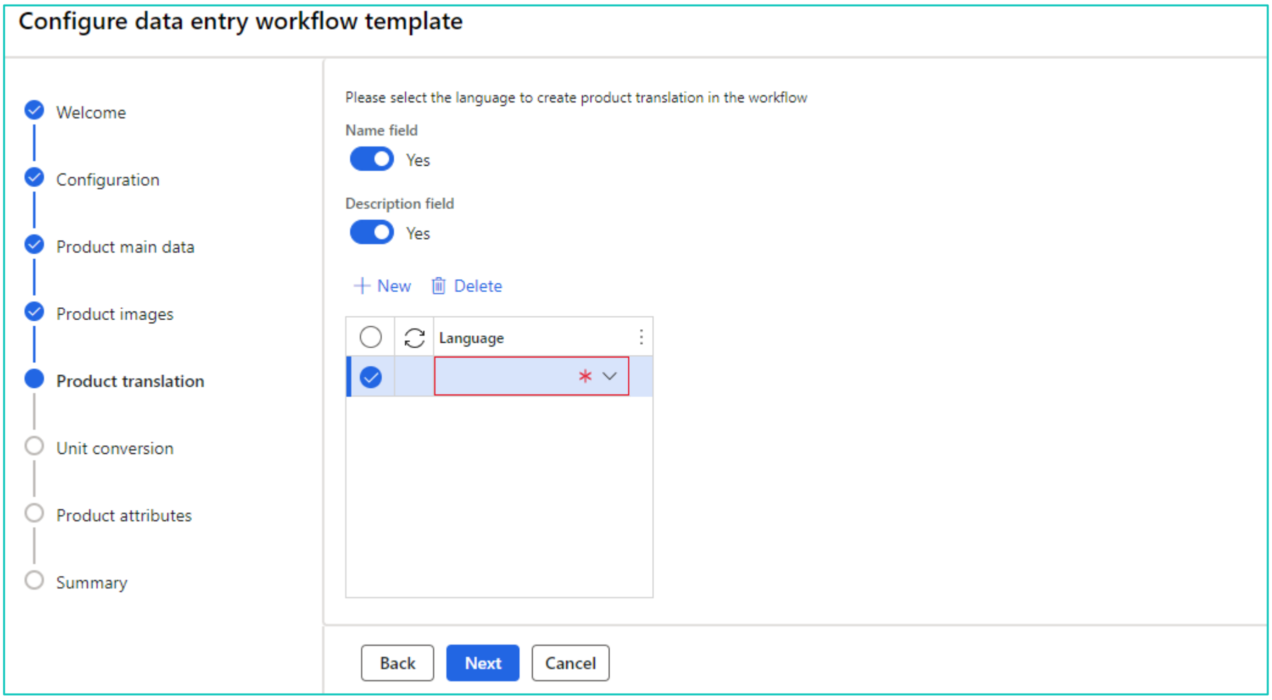


For the *Product image,* application allows the configure the following information:

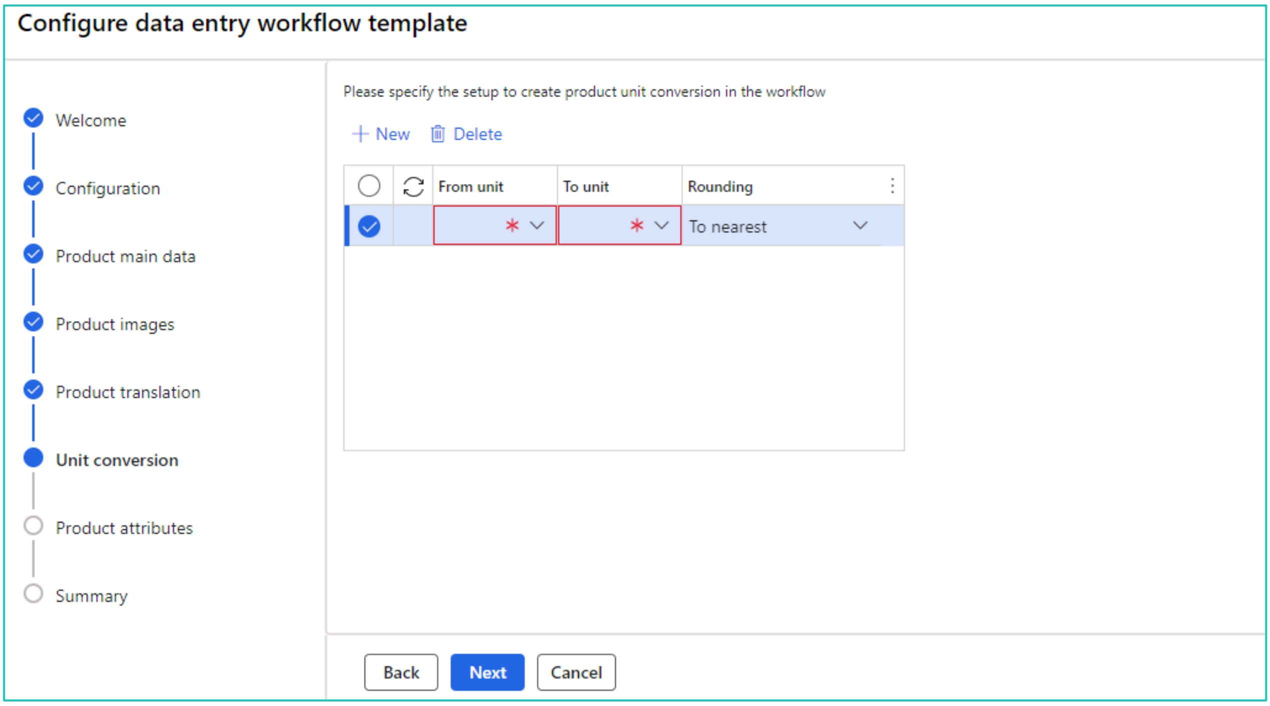
- Product Location: Product location can be selected as Product or Released product, depending on where the images need to be stored
- Attachment document type: Since images are going to be stored as document handling entries on either a product or released product, we need to configure what document handling type should we use for these entries.



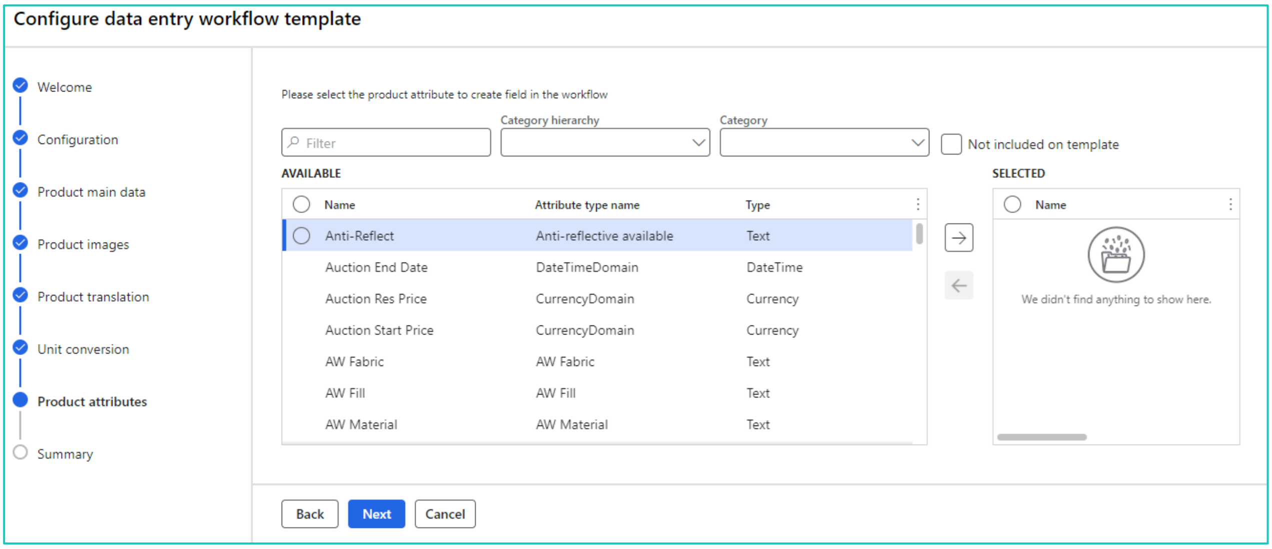
For the *Product translation,* application allows the configure the following information: *Name*, *Description*, and *Languages*.



For the *Unit conversion,* application allows the configure the following information: *From Unit, To Unit and Rounding.*



For the *Product attributes,* application allows the select the attributes to be included in the template from the list of product attributes.



2.5.3 Standard Segment and Sub-segment lookup filter extension to Data entry workflow template

This enhancement will enable users to apply the standard lookup filters for the Segment and Sub-segment fields from the standard F&SCM application to the Data Entry Workflow Template as well. This applies to both customer and vendor areas.

2.5.4 Conditional configurable lookup extensions to data entry workflow templates

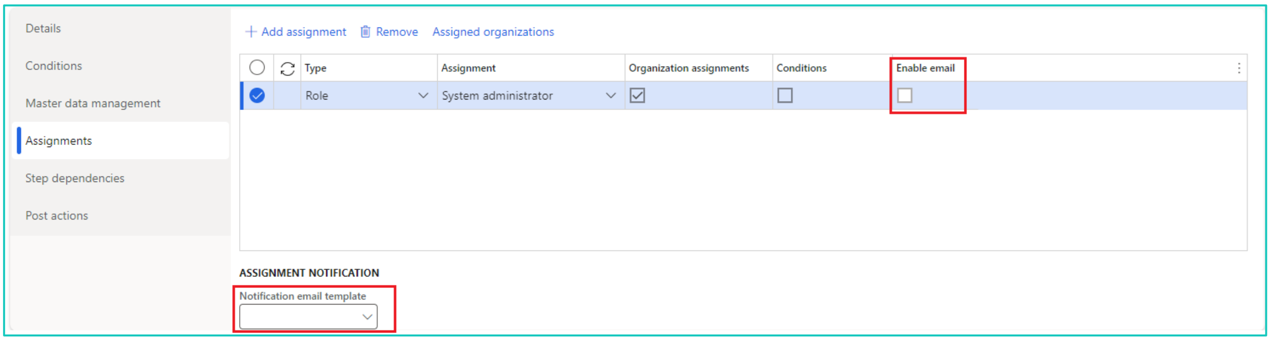
This enhancement will allow the user to use the conditional configurable lookup (configurable lookups which should be populated based on the value of another field) configured in Data quality policy while adding or amending a record using the data entry workflow template.

2.5.5 Workflow assignment notifications

This enhancement will allow the user to configure the workflow assignment notification while assigning roles or user to each step. While assigning roles or users to a step, application will allow the user to enable email for each assignment for that step. A new checkbox field named as *Enable email* has been added on the Assignment tab which will allow the user to enable or disable email notification for each assignment.

If the assignment has been enables for any Role or Team, then the application will trigger the email notification to all the users who are part of that team once the workflow reaches that step.

Application also allows the user to select the email template from the email templates configured on *System email templates* page (*System administration -> Setup -> Email)*.



Following tags can be used in the html email template for email notification:

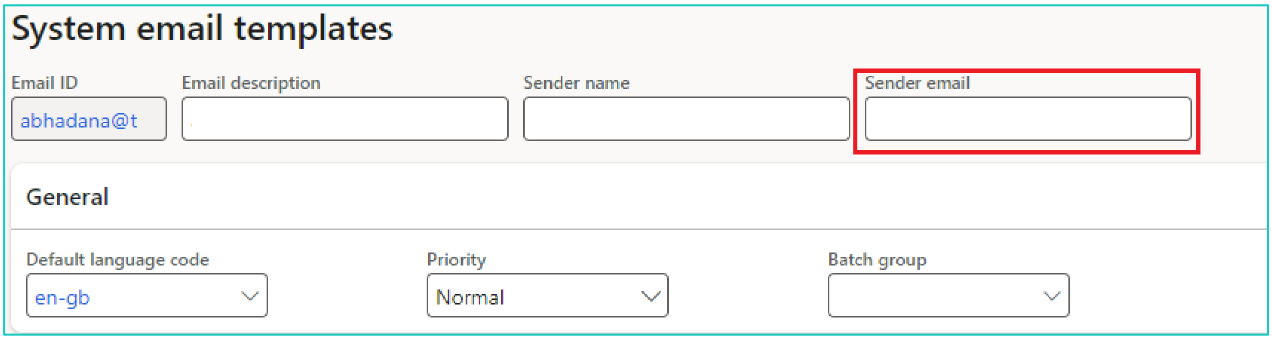
- WorkflowId: This tag will be replaced by workflow id.
- TemplateName - replaced with workflow template name
- StepName - replaced with the name of the step
- StepDescription - replaced with step description
- TitleFields: This tag will be replaced by the title fields stored on the workflow instance.
- WorkspaceURL: This tag will be replaced by the url that will navigate the user to the workspace.

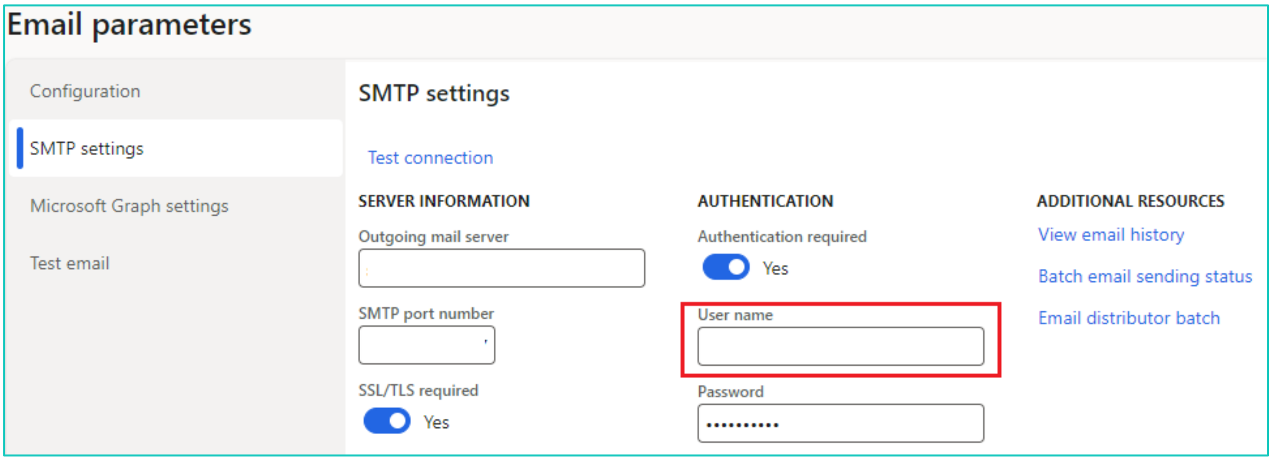
Below is the screenshot of the sample template:

```
<p>Hello, </p>

<p>A new workflow task has been created for workflow <B>%WorkflowId%</b></p>

<P> Record details: <B>%TitleFields%</b></p>
<p><u><a href = "%WorkspaceURL%">Go to all tasks assigned to me</a></u><p>

```

Note:

- Please make sure that the Sender email address configured for the email template must be the same as the username configured on the SMTP settings tab of the Email parameter page.

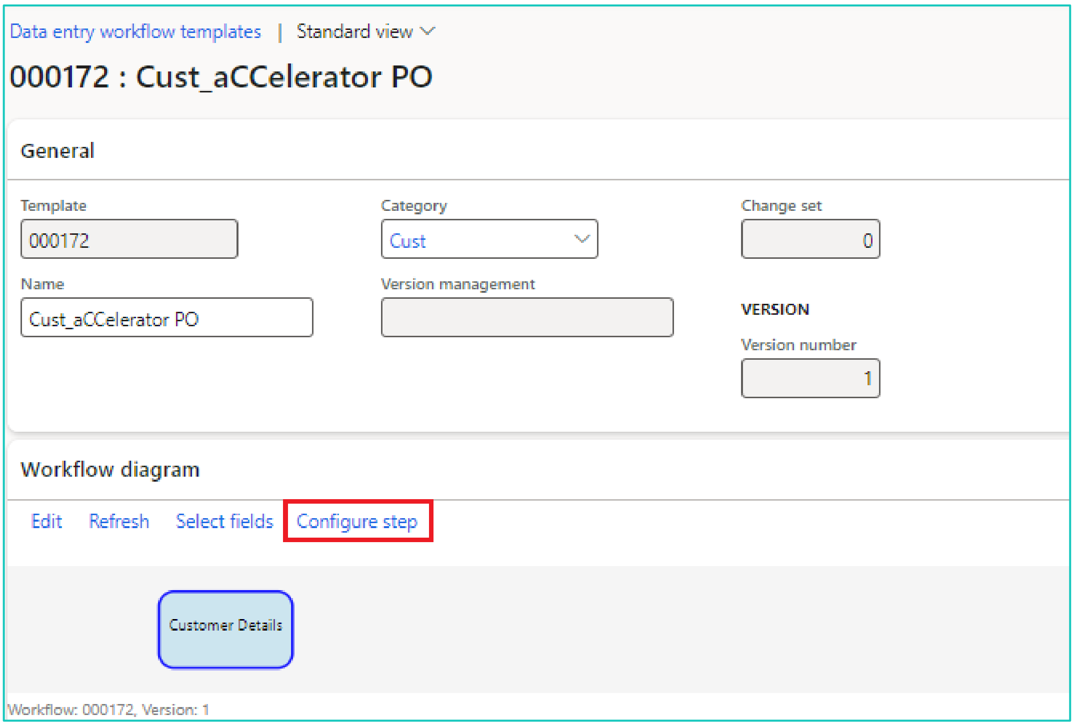



Email parameters
Configuration
SMTP settings
Microsoft Graph settings
Test email
SMTP settings
Test connection
SERVER INFORMATION
Outgoing mail server
SMTP port number
SSL/TLS required
Yes
AUTHENTICATION
Authentication required
Yes
User name
Password
ADDITIONAL RESOURCES
View email history
Batch email sending status
Email distributor batch

2.6 Release 10.0.39.14

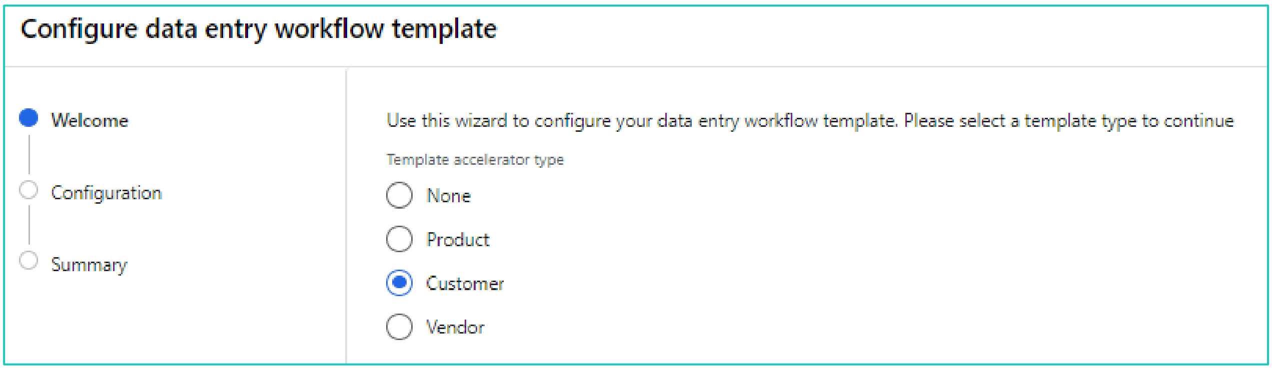
2.6.1 Customer template design accelerator

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.

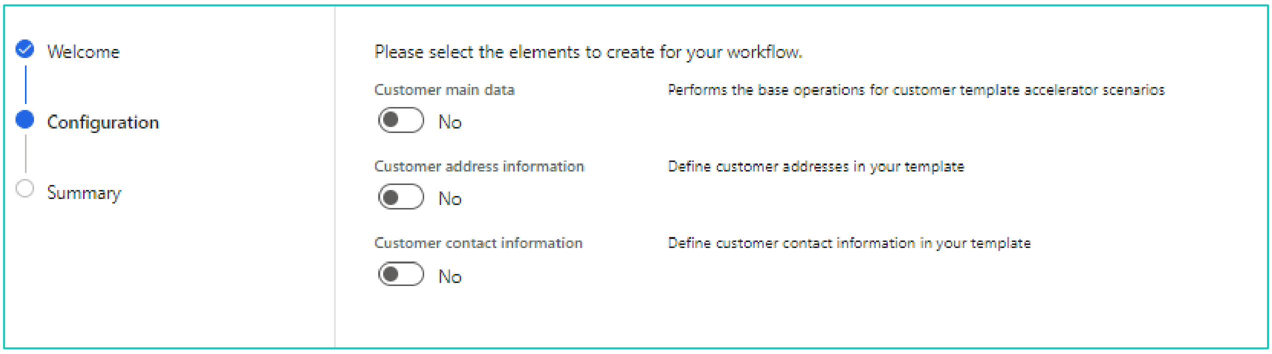


On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

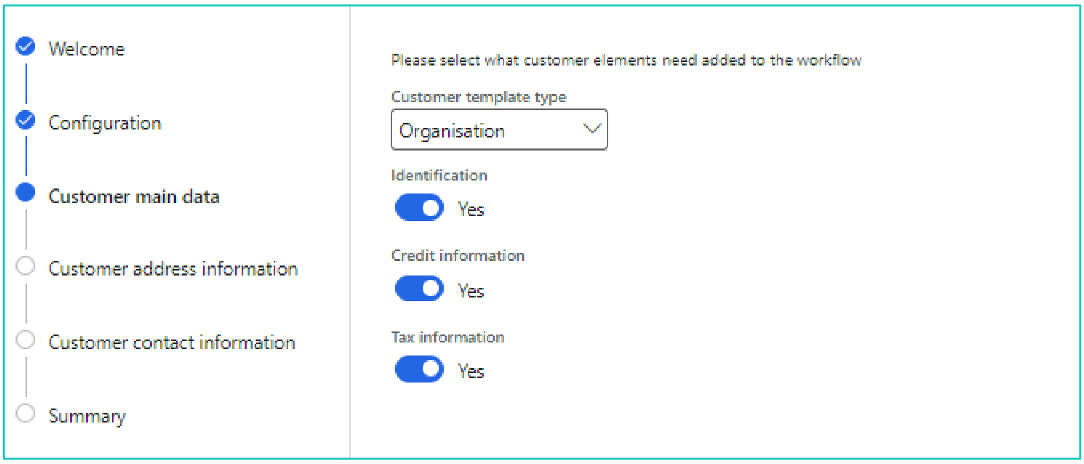
1. Select the template.



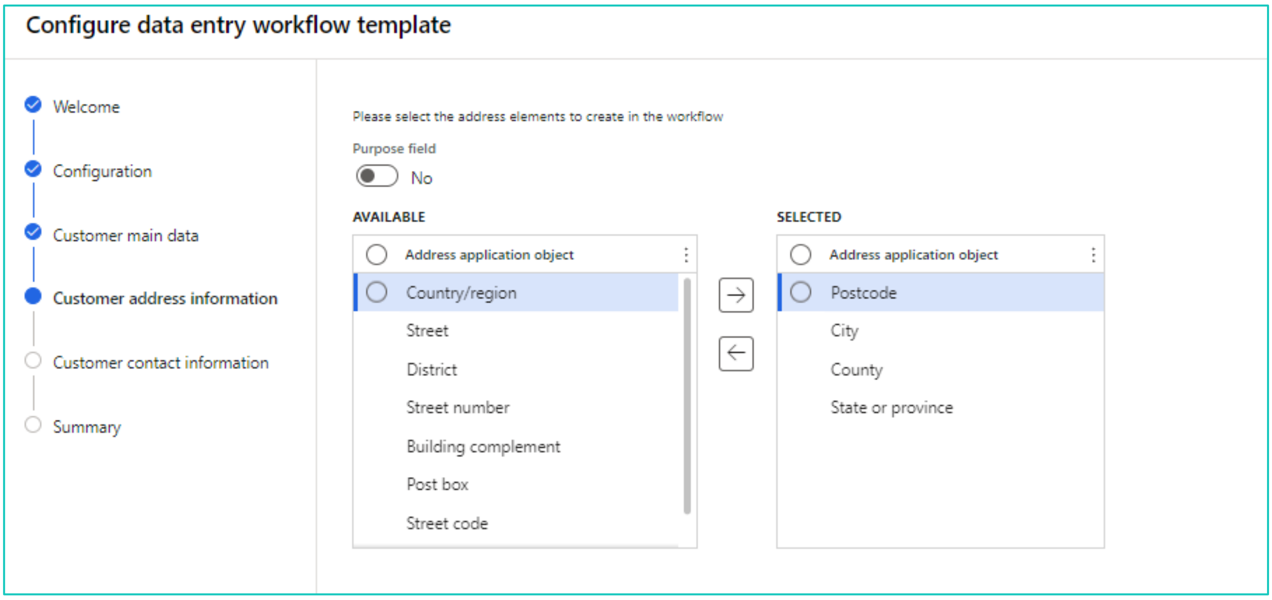
2. Enable the field groups (from Dynamics 365) using which you want to create the data entry workflow template and click on ***Next*** button.



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.

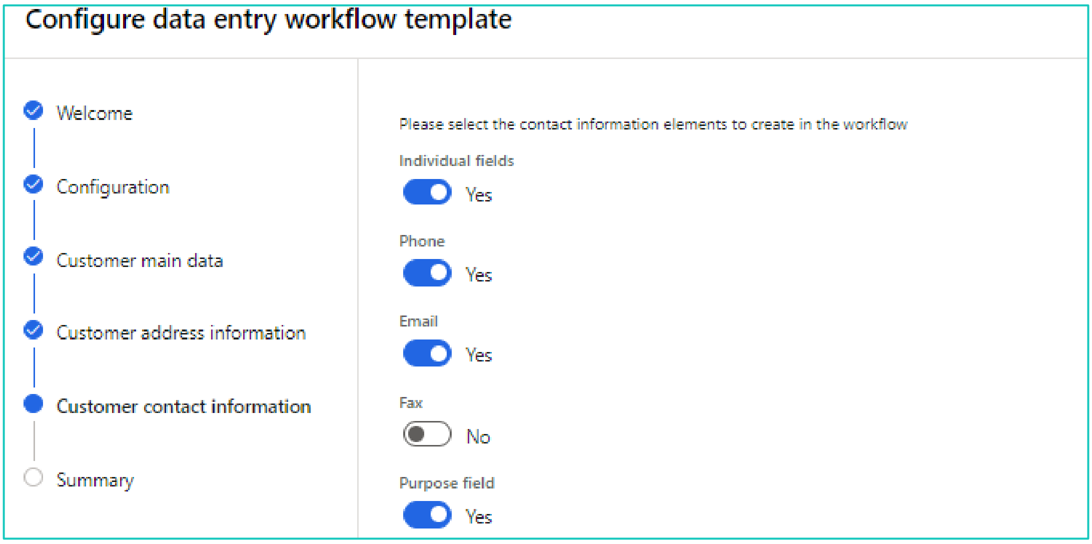


4. Select the contact address information field using the arrow buttons and click on Next button.

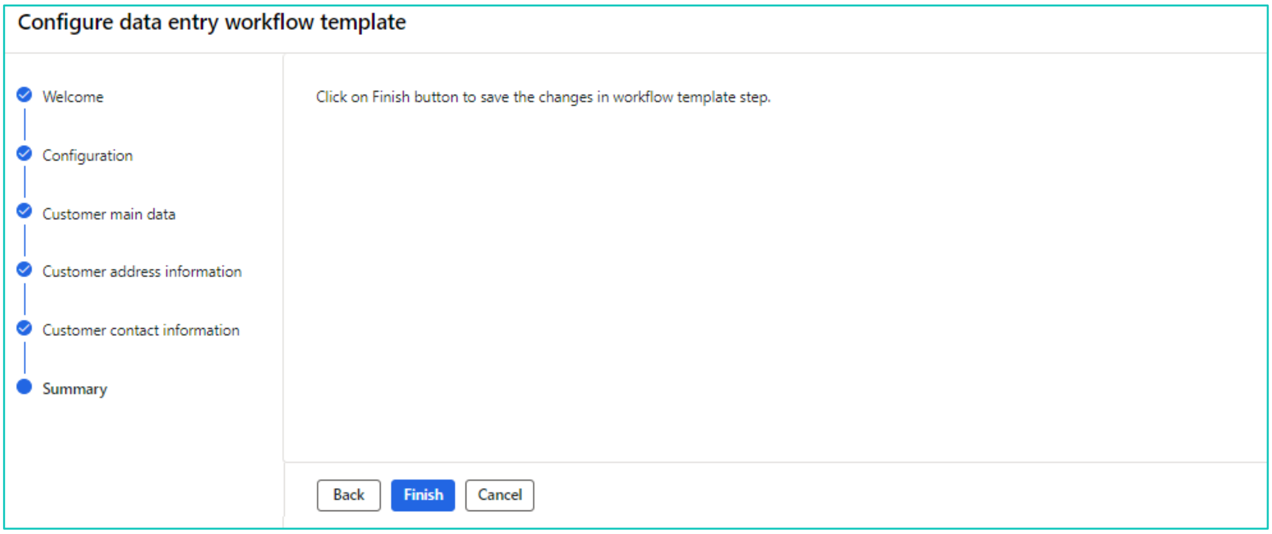


Note: You can enable "Purpose field" to allow the user to configure purpose field for customer address information.

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.

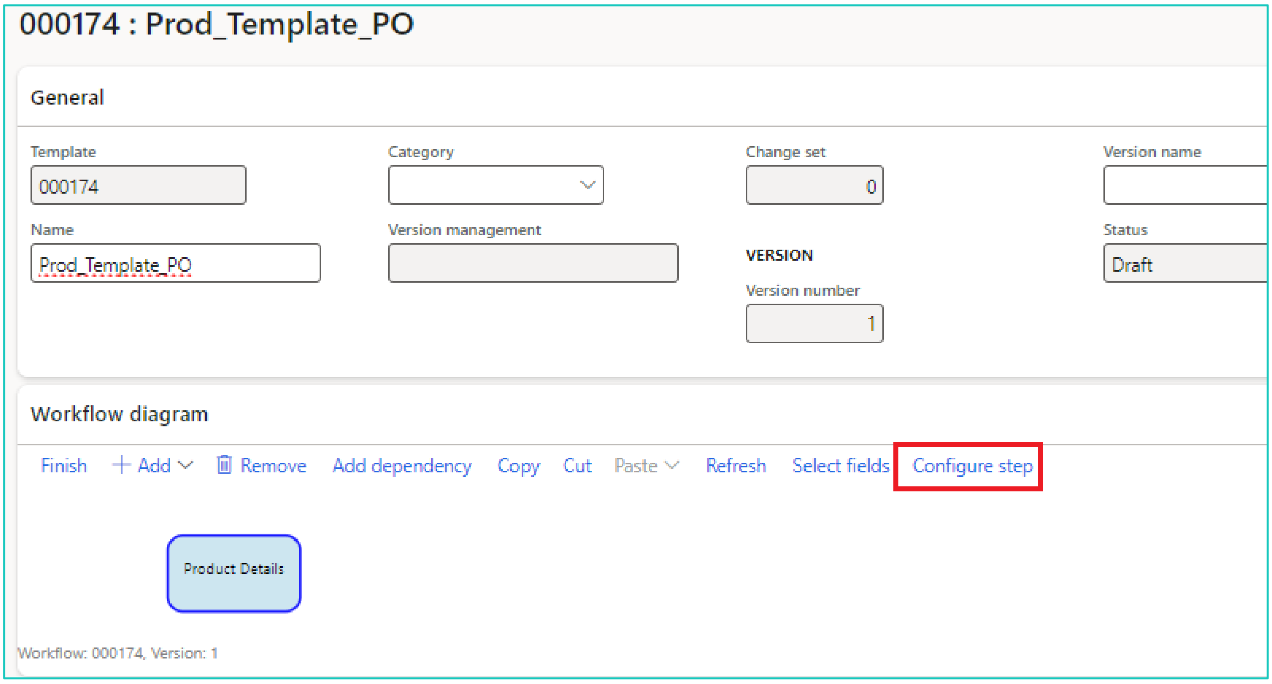


On the click of ***Finish*** button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

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

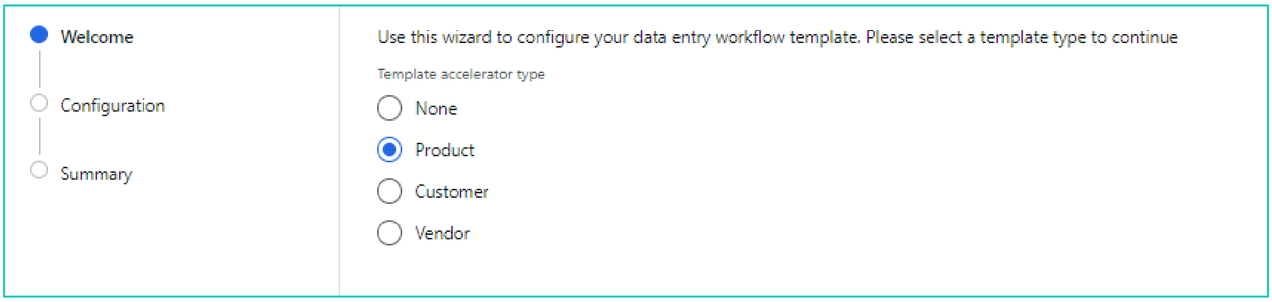
2.6.2 Product template design accelerator

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.

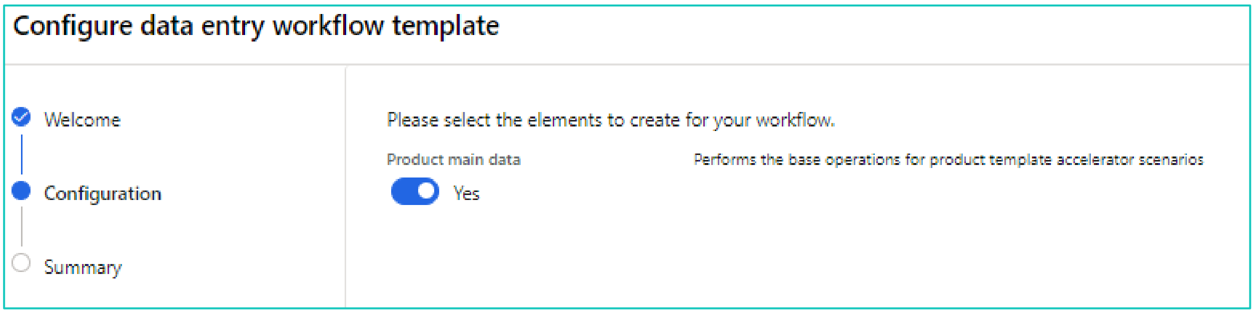


On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

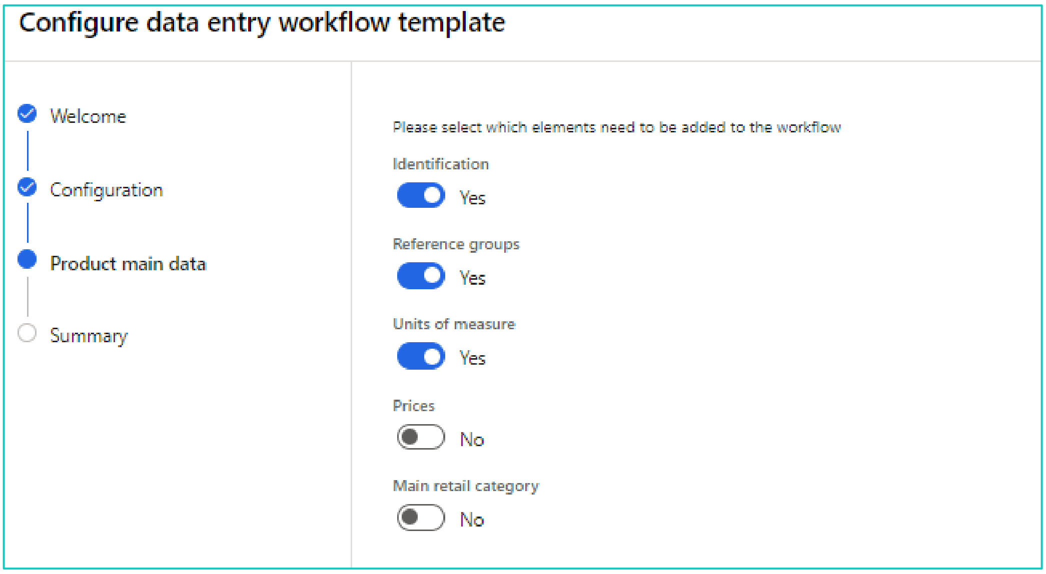
1. Select the template.



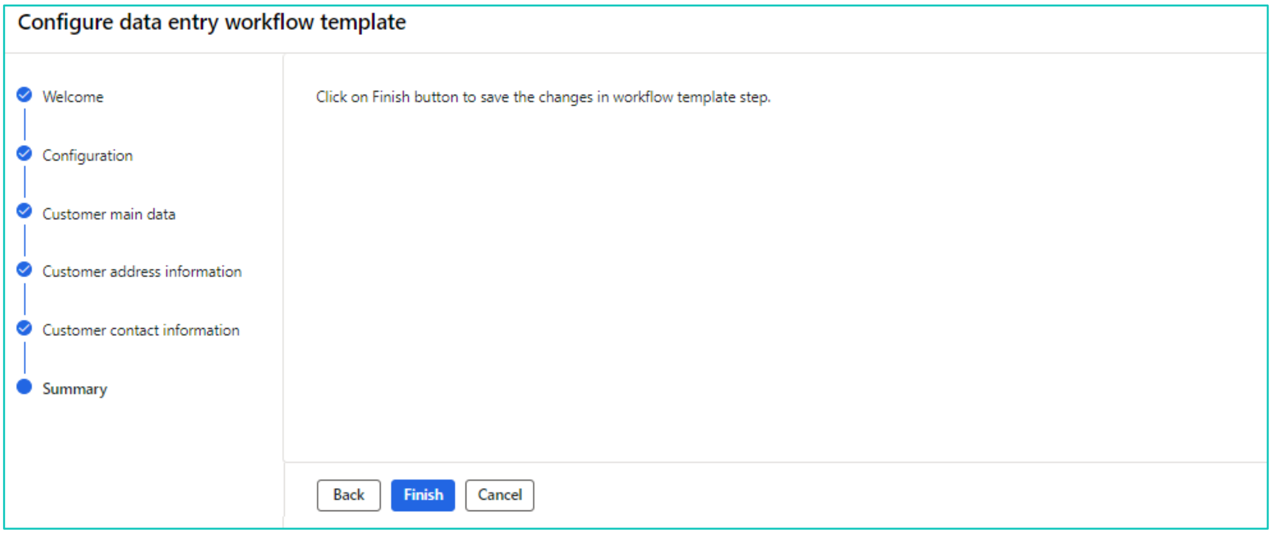
2. Enable the field groups (from Dynamics 365) using which you want to include in the data entry workflow template and click on ***Next*** button.



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.



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

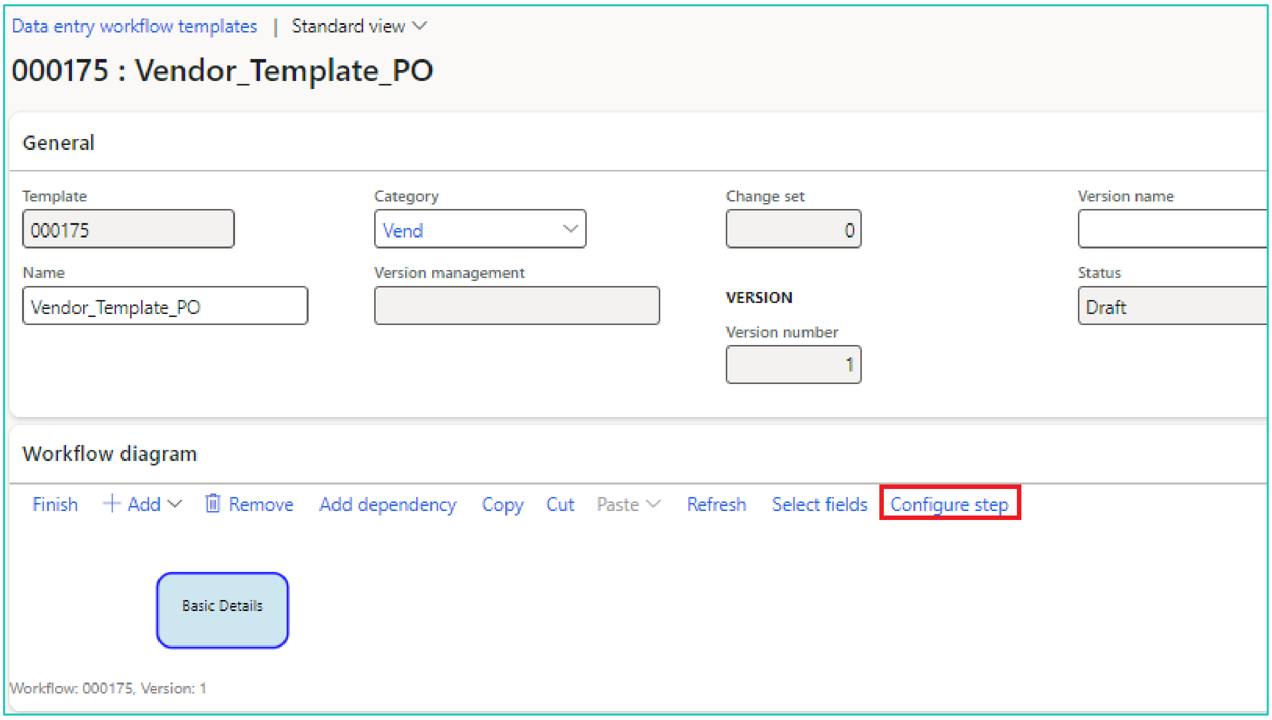


On the click of ***Finish*** button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

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

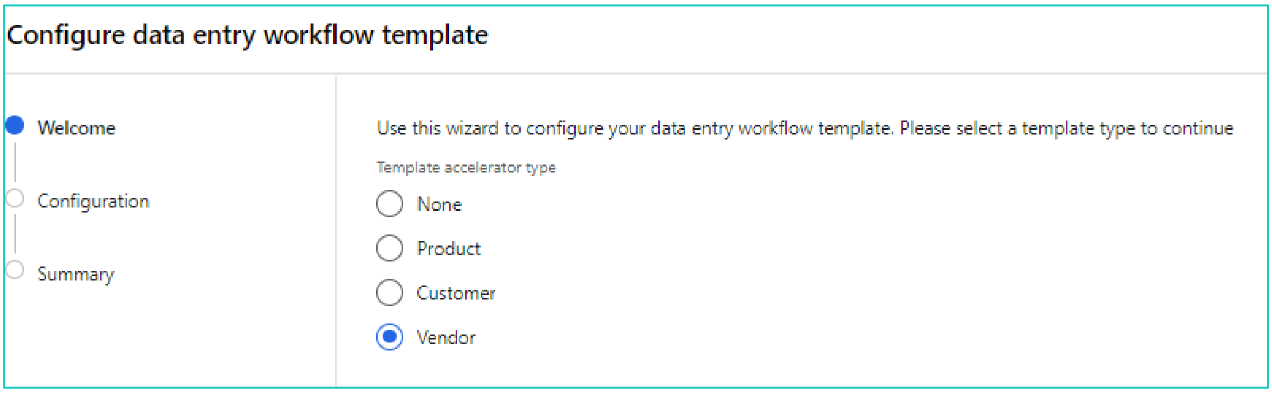
2.6.3 Vendor template design accelerator

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.

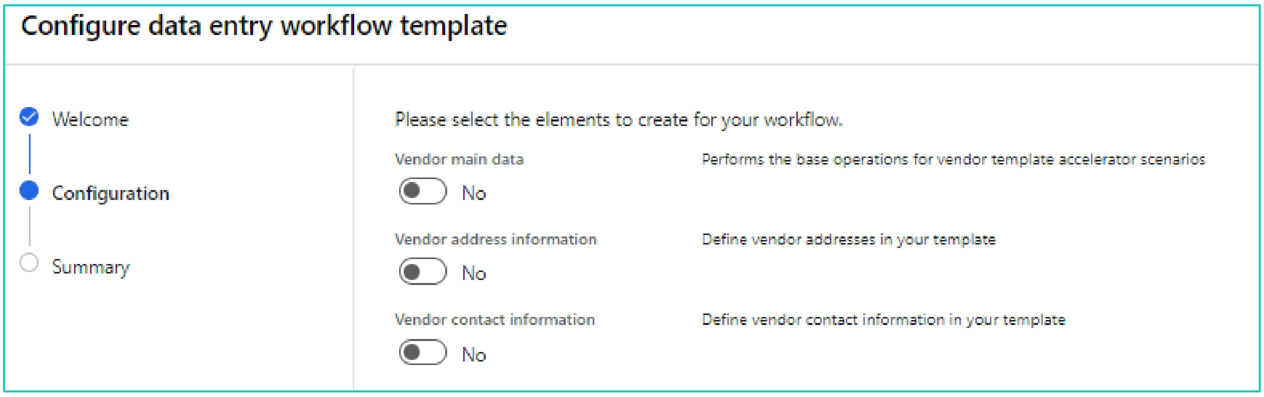


On the click of *Configure step* button, application will prompt a pop-up. The user will need to perform the following steps on this pop-up:

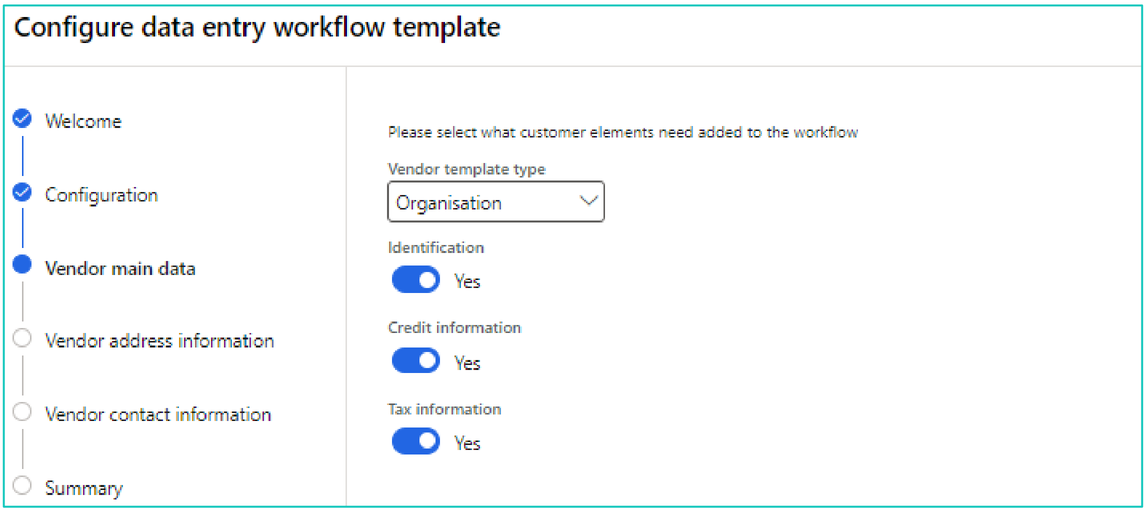
1. Select the template.



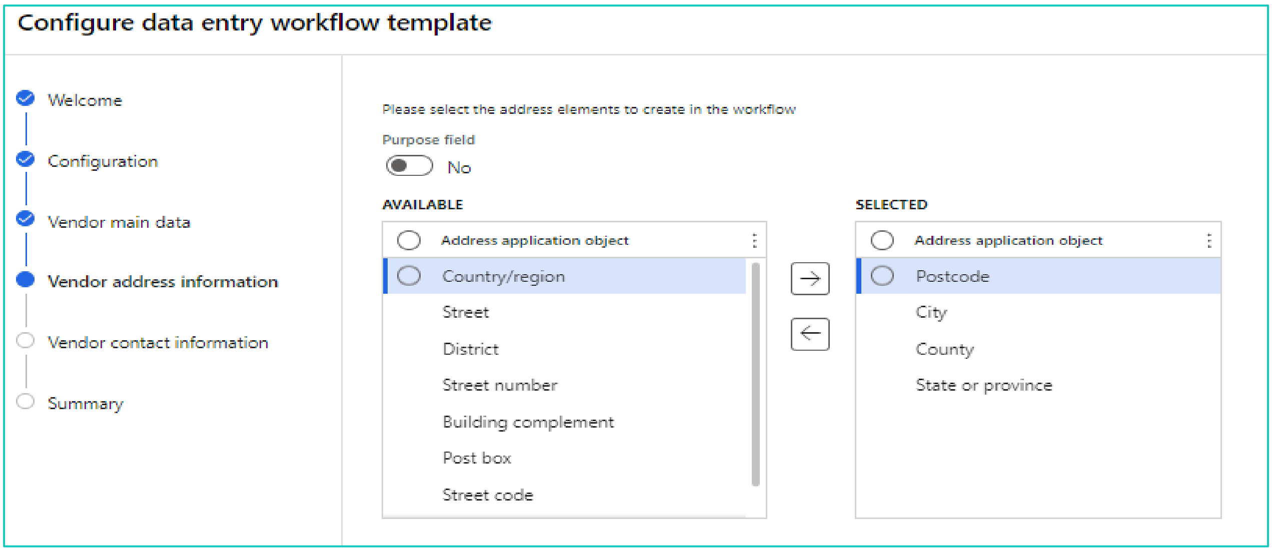
2. Enable the field groups (from Dynamics 365) using which you want to create the data entry workflow template and click on ***Next*** button.



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.

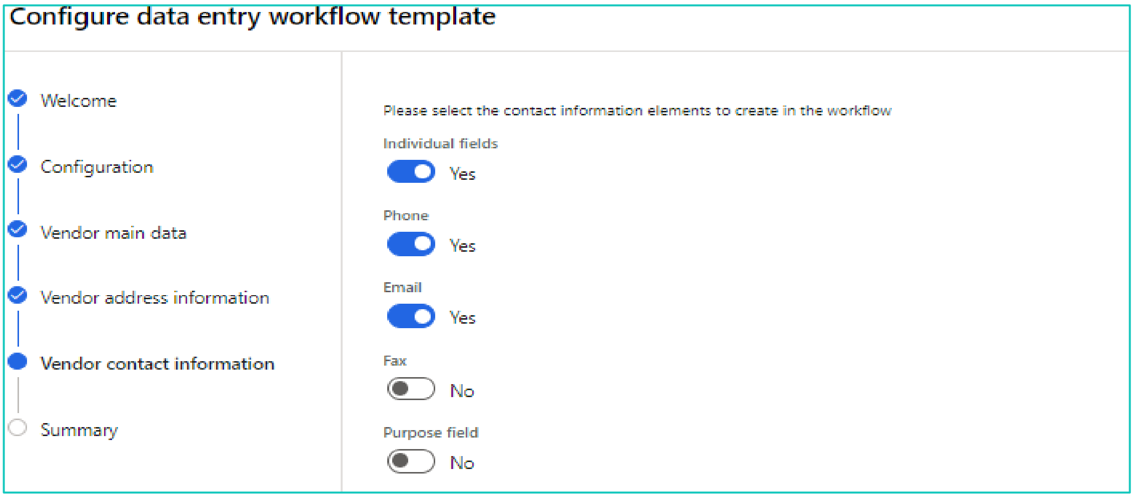


4. Select the contact address information field using the arrow buttons and click on Next button.

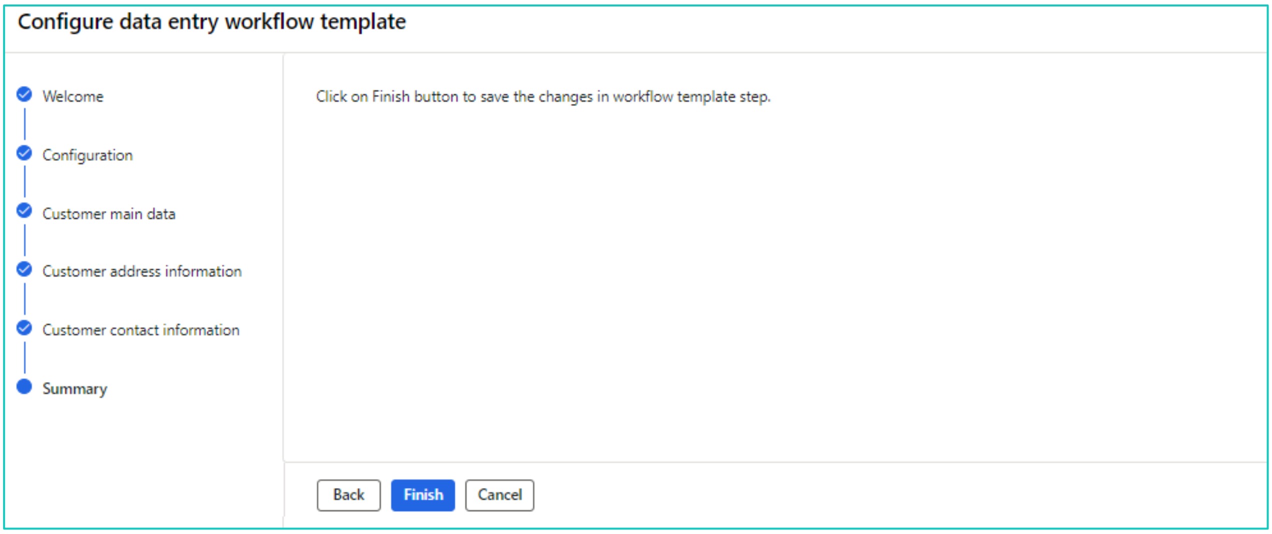


Note: You can enable “Purpose field” to allow the user to configure purpose field for customer address information.

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.

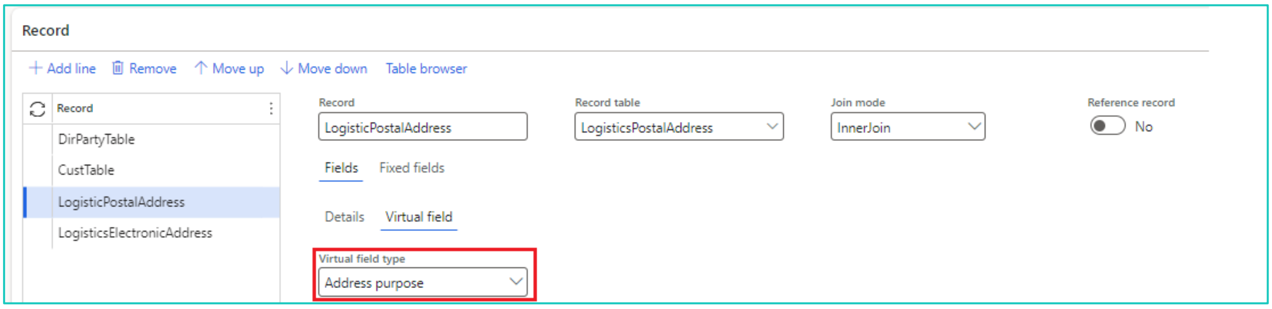


On the click of *Finish* button, application will close the pop-up and navigate the user to template page and will populate the field groups and field based on the configuration selected.

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

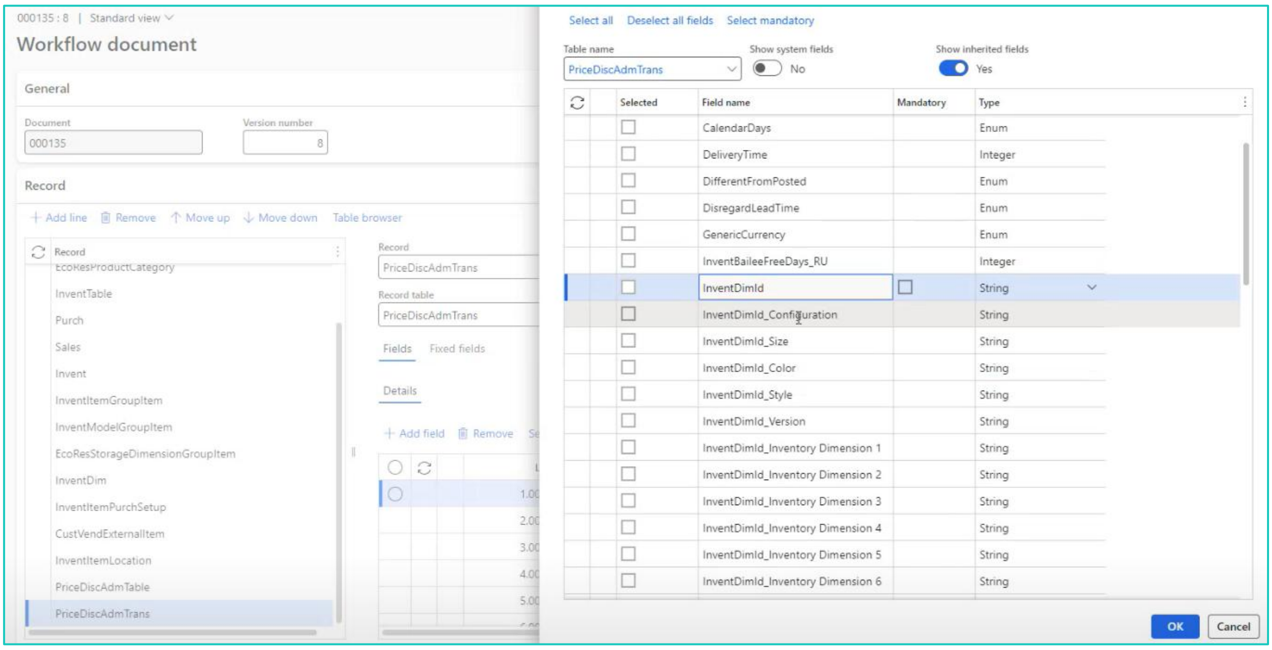
2.6.4 Add purpose selection for Addresses and contact information

The standard F&SCM 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.



2.6.5 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.

2.7 Version 10.0.38.13

2.7.1 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 10.0.43.20

ID	Title
187989	DEW - Does not support Number sequences with continuous set to yes This fix will ensure that application must support continuous number sequence for customer account number.
216039	CS00236264 | Enumerables are considered empty even when populated This fix will ensure that the user is able to create a record using a DEW template which has ApprovedCustForecastPolicyType field.
217013	CS00236430 | DEW incorrectly assigning Workflow to users who no longer have a security role This bug fix will ensure that the users who are not allocated with the role specified in the Assignment tab should not be able to access the workflow instance step.

3.2 10.0.42.19

ID	Title
185649	Reset steps button must reassign workflow step. This fix must ensure that on clicking “Restart Step(s)” button, the selected step will be reallocated to the user and the pop-up will appear immediately to make the changes in the data captured in that step.
194617	Workflow stuck in progress after conditional branching This fix will ensure that in case of conditional branching, application must navigate the user to next step (based on the condition) without any error.
204537	Error creating Maintenance Plan Lines This fix will ensure that user to able to create a template with Maintenance plan lines and is able to capture data using the template.
208175	CS00235214 | Template query This fix will ensure that for toggle button, “No” is considered a value and application must not prompt the error that the value is not filled for this field.

3.3 10.0.41.18

ID	Title
208370	Jobtype Default - work description length on DEW not present same behavior as in standard D365 This fix will ensure that the details captured for Memo type fields must not be truncated when the data is transferred into F&O after approval.

3.4 10.0.41.17

ID	Title
204537	Error creating Maintenance Plan Lines This fix will ensure that user is successfully able to create and activate the workflow for Maintenance Plan lines to capture maintenance plans

3.5 10.0.41.16

ID	Title
201928	CS00234434 | DEW -Lookup fields not inserting the correct information This fix will ensure that while selecting a Bank account using the drop-down, application must populate the bank account in the field so that the record can be saved.

3.6 10.0.40.15

ID	Title
187975	Duplicate tables created when using InventTable extensions This fix will ensure that when processing a released product template which has MCRInventTable, WHSInventTable, RetailInventTable in the Workflow document, application must allow the user to create the record without any error
195663	Int64 field not showing up on DEW template This fix will ensure that Int64 fields that are not surrogate keys will be displayed in a data entry workflow template and will store and transfer the value to the final field without issues.

3.7 10.0.39.14

ID	Title
184432	New version Create with blank Template giving error while adding new fields in the template. 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.
186403	Approve label spelling is wrong for grid view. The spelling of “Approve” label was incorrect for grid on the approve steps. The spelling has been corrected.
186565	Selecting fields before Country/region field in the LogisticsPostalAddress table does not populate data correct on record. 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.

187355	The sequence does not appear the same in the DEW Instance as defined in the configuration lookup. This fix will ensure that the sequence for configuration look (User defined list) must be same as configured in the DQS application.

3.8 10.0.38.13

ID	Title
	Field values form cannot be opened if the workflow record name contains spaces. 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.
	Default values are not populated for specific enums and reference fields 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.

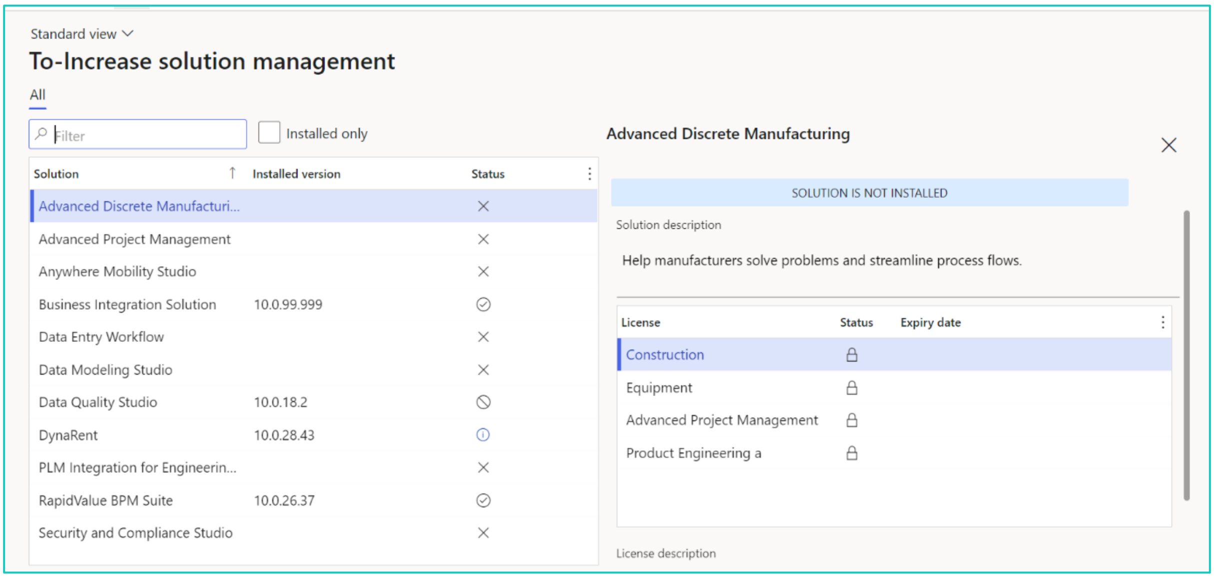
4. Common features

Staedean 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 Supply Chain Management 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.



On all Staedean 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.

Below is the list of changes in common library in Jan-2025 release:

#	Issue	Description
1	Deprecation fix	This will ensure that the STAEDEAN License team can generate and upload license files to Azure Blob Storage without any impact. Additionally, customers will be able to retrieve their license files from Azure Blob Storage seamlessly.
2	Enumeration translation fix	This will ensure that customers do not encounter any issues while using the 'Populate Enumeration Translations' process.
3	Solution management batch job issue	This will ensure that customers do not experience any issues while performing deployments or maintenance mode activities.
4	To hide the 'Used' column in Solution management	This will ensure that no confusion is caused to customers due to the accuracy of the Used column data.
5	In-App feedback - tenant fix	This will ensure that the In-App feedback does not automatically pop up for STAEDEAN users.

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 Staedean.

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 Staedean support.