

USER MANUAL

As a new user of the Open Entity application, you can access the application's main page from the Role Center.

Dynamics 365 Business Central

Environment: OpenEntity Demo

CRONUS ES | Finance | Cash Management | Sales | Purchasing | Shopify | Open Entity | All Reports |

Dashboard

Insight from last week

Bartolomé Castellanos was busy, with 27,6 units booked

Actions

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

> Find entries...

> New

> Payments

> Reports

Excel Reports

Power BI Reports

Activities

Sales This Month

54.670 €

> See more

Overdue Sales Invoice Amount

332.437 €

> See more

Overdue Purch. Invoice Amount

34.030 €

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes

2

>

Sales Orders

46

>

Completely Re... from Stock

0

>

Sales Invoices

8

>

Ongoing Purchases

Purchase Orders

14

>

Ongoing Purch... Invoices

3

>

Purch. Invoices... Next Week

0

>

Payments

Unprocessed Payments

1

>

Average Collec... Days

0,0

>

Outstanding V... Invoices

10

>

Scan documents

Create Incom... from Camera

Incoming Documents

My Incoming Documents

0

>

Missing SII Entries

Missing SII Entries

0

>

Days Since Las... Check

0

>

Job Queue Tasks

Job Queue Tasks

Tasks Failed

Tasks In

Tasks In Queue

E-Document Activities

Incoming E-Document

Linked Purchase

Waiting Purch...

Intercompany

Incoming Transactions

New Intercom...

Rejected

Outgoing Transactions

Intercompany ...

The page that appears after navigating through **Open Entity -> Dashboard** is divided into three main sections.

In the first section, **Clipboard**, you will see a cue (button) displaying the number of pages you have configured with the utility (Copy/Clipboard).

The second section, **Utilities & Notifications**, includes the utilities available to you and the notifications resulting from operations (Clipboard and Utilities).

Dynamics 365 Business Central

Environment: OpenEntity_Demo

CRONUS ES

Finance

Cash Management

Sales

Purchasing

Shopify

Open Entity

All Reports

Dashboard

Manage

Open Entity - Dashboard

Clipboard

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Clipboard Pages

Utilities & Notifications

Main Utilities

Description	Folder	Action	Run Type
→ New promotional spring2024 Discounts	:	Run Process	Normal
Create an unique Order from other documents		Run Process	Normal

Open Entity Background Notifications

Date	Time	Source	Message	Result	Track	
→ 19/01/2025	:	10:06:48	Clipboard	Copy-Paste Sales Header: Orde...	Success	{b055af51-4bbb-44f6-9fd7-b382...

Folders and Archive

Folders List

Folder 1	Description	Utilities	
→ COPYPASTE	:	Templates dedicated to copy-paste action	1
DEMO		Demos	0
EXCEL		Templates 4 Excel	0
EXPORTS		Templates for Export Data	7
EXTERNAL APP		Templates 4 Connectivity	0
HODGEPODGE		A mess of Templates	0
POCF5555		Templates for Export Documents	0

Archived List

Entry No. 1	Date	Time	Type	Name	Notes	Source Template	
→ 1	:	03/06/2024	3:28:56	User	test custnewdiscounts	test custnewdiscounts	CUSTNEWDI...
2		06/06/2024	18:58:54	User	InventorySandboxDev 06-06-24	Inventory with empty Location	
4		06/08/2024	11:35:09	User	OEIT items	Demo Archive	EXPORTITEMS
5		18/08/2024	2:03:09	User	*	*	*
6		18/08/2024	2:22:27	2	Backup Data OE	from sysbackuprestore templa...	SYSAPPBACK...
7		24/09/2024	3:40:30	User	*	*	*
8		28/10/2024	6:58:00	User	*	*	CUSTOMER...

Close

Tasks Failed

Tasks In

Tasks In Queue

Linked Purchase

Waiting Purch...

New Intercom...

Rejected

Intercompany ...

The third and final section, **Folders and Archive**, consists of a 'virtual' folder system where you can organize the available utilities and a repository for your data archived by any of your utilities.

CLIPBOARD PAGES

This action will copy the records to the clipboard.

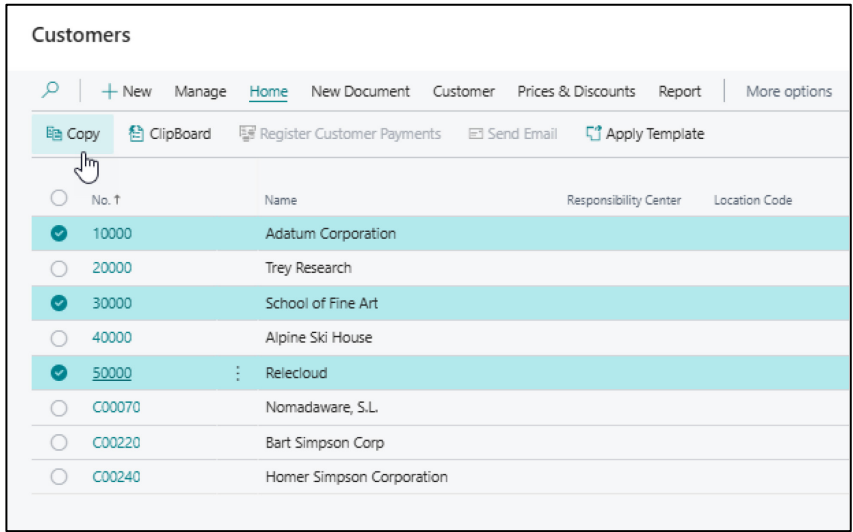
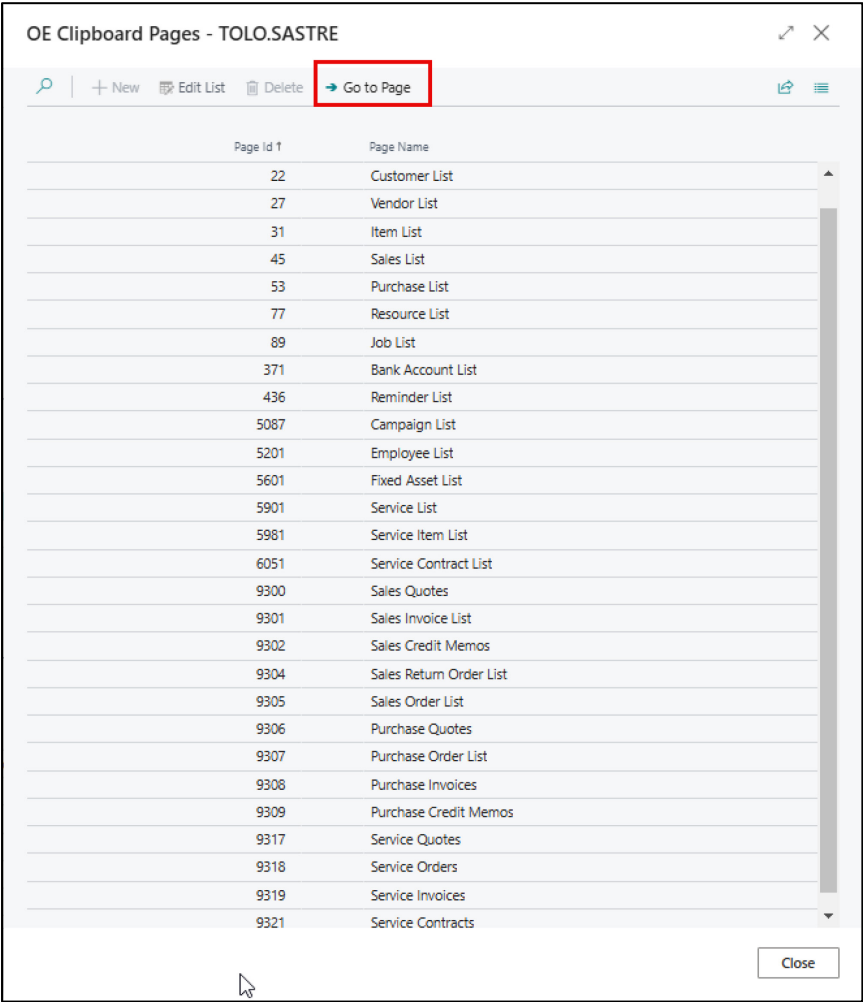
By clicking on **Clipboard Pages**, you will access a list of pages enabled with the **Copy-Clipboard** utility. Similarly, you will see these actions available if you access data lists independently (by navigating in the usual way within Business Central).

By selecting any of them and clicking the **'Go to Page'** action, you will be taken directly to the corresponding page.

Once the selected list is open (for example, **Customers**), in the **Home** option, you will see two new actions named **'Copy'** and **'Clipboard'**.

To use this utility, you must first select the data you want to work with and then click on the **'Copy'** action.

This action will copy the records to the clipboard.



On the **Clipboard** page, you can see up to five available actions at most. The available actions will depend on the configuration set by your **Manager**.

- **Paste:** Copies and pastes the selected records.
- **Export:** Exports the records to another company, environment, or tenant.
- **Excel:** Creates an Excel sheet with the selected data according to the chosen template.
- **Archive:** Creates an archive file with the selected data.
- **Save to File:** Generates an XML file with the selected data, downloading it to your computer.

The selected information depends on the chosen **Template**, which can simply operate with customer data or also include prices, discounts, orders, invoices, etc.

TOLO.SASTRE

✓ Saved

OE Clipboard

Edit List Delete Delete All Paste Export Excel Archive Save to File Refresh More options

General

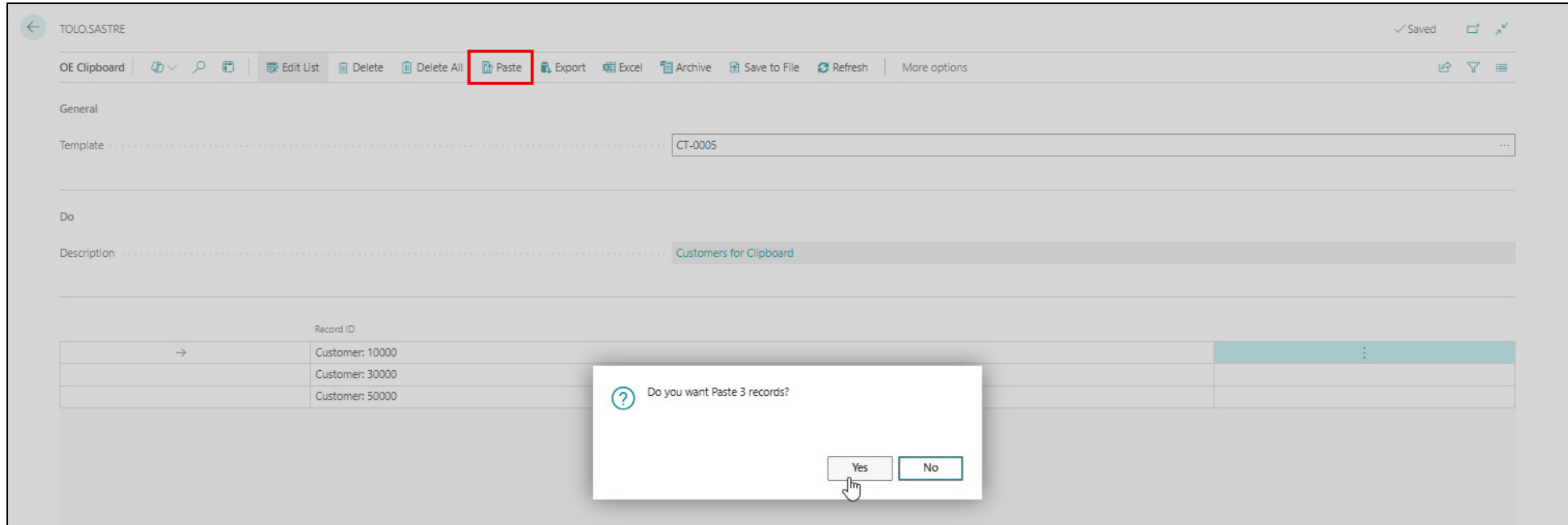
Template

Do

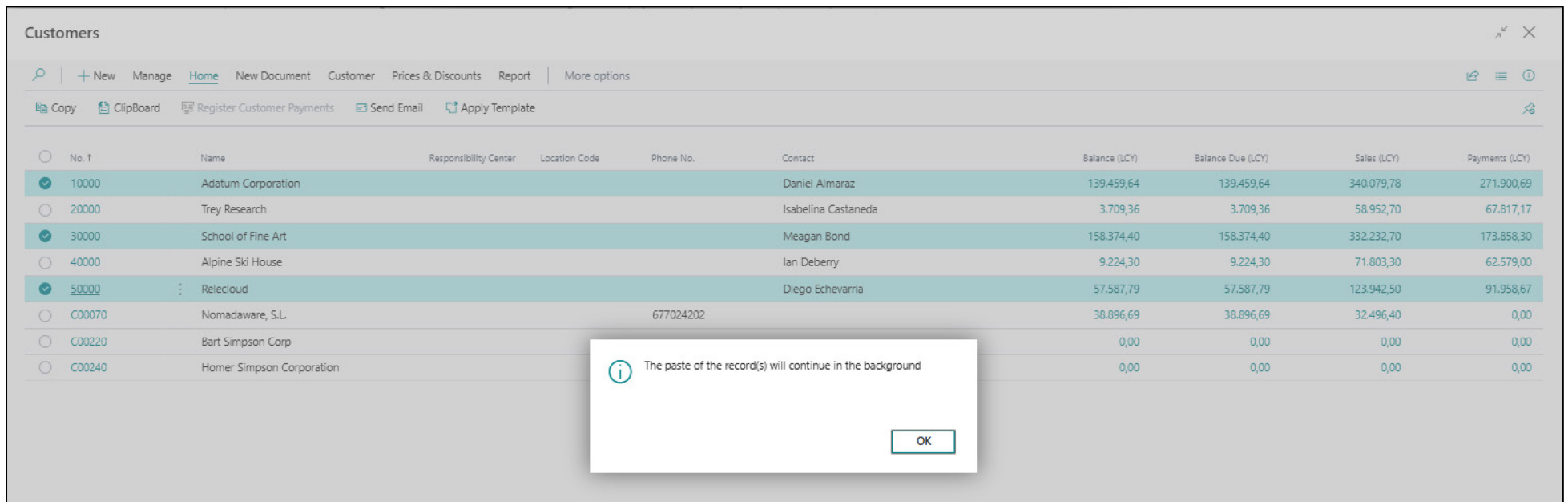
Description

Record ID
Customer: 10000
Customer: 30000
Customer: 50000

When performing an action, a confirmation will be requested.



The executed process runs in the background for the **Paste** and **Export** actions, but not for the other actions.



The second action in the data list (**Customers -> Clipboard**) simply opens the page to check whether there are still records pending processing or if they have already been processed and are no longer visible.

Background actions executed from the clipboard are reflected in our **Notifications** area, informing us of the operation's outcome.

If we want to see the details of the performed operations, we can click on the **'Track'** column.

Dashboard

Manage

Open Entity - Dashboard

Clipboard

Clipboard Pages

Utilities & Notifications

Main Utilities

Open Entity Background Notifications

Refresh Action

Description	Folder	Action	Run Type	Date	Time	Source	Message	Result	Track
→ New promotional spring2024 Discounts		Run Process	Normal	19/01/2025	10:06:48	Clipboard	Copy-Paste Sales Header: Orde...	Success	{b055af51-4bbb-44f6-9fd7-b382...
Create an unique Order from other document						Clipboard	Copy-Paste Customer: 50000	Success	{08eb720c-0cca-4baf-8ead-d4e0...

Folders and Archive

Folders List

Folder f	Description
→ COPYPASTE	Temp
DEMO	Dem
EXCEL	Temp
EXPORTS	Temp
EXTERNAL APP	Temp
HODGEPODGE	A me
...	Temp

OE Log Operations List - {08EB720C-0CCA-4BAF-8EAD-D4E00E1C1AE9}

Record ID	Action	Suc...	Error Code	Error Description
→ Customer: C00250	Insert	✓		
Sales Price: 1900-S,Customer,C00250,18/02...	Insert	✓		
Sales Line Discount: Item,1896-S,Customer,...	Insert	✓		
Sales Line Discount: Item,1896-S,Customer,...	Insert	✓		
Sales Line Discount: Item,1906-S,Customer,...	Insert	✓		
Sales Line Discount: Item,1906-S,Customer,...	Insert	✓		
Sales Line Discount: Item,1964-S,Customer,...	Insert	✓		
Sales Line Discount: Item,1964-S,Customer,...	Insert	✓		
Customer: C00260	Insert	✓		
Sales Price: 1906-S,Customer,C00260,"", "", ...	Insert	✓		
Customer: C00270	Insert	✓		

OK Cancel

Time	Type	Name	Notes	Source Template
3:28:56	User	test custnewdiscounts	test custnewdiscounts	CUSTNEWDI...
18:58:54	User	InventorySandboxDev 06-06-24	Inventory with empty Location	
11:35:09	User	OBIT items	Demo Archive	EXPORTITEMS
2:03:09	User	*	*	*
2:22:27	2	Backup Data OE	from sysbackuprestore templa...	SYSAPPBACK...
3:40:30	User	*	*	*
...	...	...	...	...

Close

In the **Notifications** area, we can: **Refresh** the page to check if new notifications have been added, **Delete Line**, which removes the notification we are currently on, **Clear All**, which deletes all notifications.

Open Entity Background Notifications▼

Date	Source	Message	Result	Track
19/01/2025	Clipboard	Copy-Paste Sales Header: Orde...	Success	{b055af51-4bbb-44f6-9fd7-b382...
→ 19/01/2025	Clipboard	Copy-Paste Customer: 50000	Success	{08eb720c-0cca-4baf-8ead-d4e0...

Delete Line

Refresh

Clear All

Open in Excel

In **Main Utilities**, we will find our most frequently used functions. Those that we use less frequently can be **moved** to the ‘**virtual folders**’ or **Folders**, simply by selecting or even creating one in the ‘**Folder**’ column.

This way, we can organize our recurring tasks and know where to find them when needed. When moving a utility to a folder, the number of templates in that folder will increase, while the current entry will disappear from the **Main Utilities** section.

Utilities & Notifications

Main Utilities▼

Open Entity Background Notifications

Description	Folder	Action	Run Type	Date
New promotional spring2024 Discounts		Run Process	Normal	→ 19/01/2025
→ Create an unique Order from other documents	⋮	Run Process	Normal	

Folders and Archive

Folders List▼

Folder ↑	Description	Count
→ COPYPASTE	Templates dedicated to copy-paste act...	0
DEMO	Demos	0
EXCEL	Templates 4 Excel	0
EXPORTS	Templates for Export Data	7
EXTERNAL APP	Templates 4 Connectivity	0
HODGEPODGE	A mess of Templates	0
PROCESSES	Templates for Execute Processes	2
REPLICATION	Templates for Replicate Data	0
REQUESTS	Templates for Request Info	2
ULYSES	Templates for that PMS	0
WEBHOOKS	Base Template 4 Webhooks	0

Folder ↑

User ↑

Description

COPYPASTE

DEMO

EXCEL

EXPORTS

EXTERNAL APP

+ New

Show details

Select from full list

We can perform the reverse operation by accessing the templates within a folder by clicking on its number or selecting **‘Go to Folder’** from the **Folders List** actions.

Simply by clearing (removing) the corresponding **Folder** column, the utility will be **relocated** to **Main Utilities**, and it will disappear from the current folder.

Utilities & Notifications				
Main Utilities ▾				
Description		Folder	Action	Run Type
→	New promotional spring2024 Discounts	⋮	Run Process	Normal
Folders and Archive				
Folders List ▾				
Folder ↑		Description	Utilities	
	COPYPASTE	Templates dedicated to copy-paste action	1	▲
→	DEMO	Demos	1	⬇
	EXCEL	Templates 4 Excel		
	EXPORTS	Templates for Export Data	7	

OE My Custom List				↗	✕
🔍	⚙ Edit List	📄 Run		🔗	☰
Description		Action	Folder ▾		
→	Create an unique Order from other documents	⋮ Run Process	DEMO		▾

To execute our utilities, whether in the **Main Utilities** area or from our folders, we will select the **Run** action.

Utilities & Notifications

Main Utilities ▾

Run
Open in Excel

	Folder	Action	Run Type
onal spring2024 Discounts		Run Process	Normal
→ Create an unique Order from other documents	⋮	Run Process	Normal

It is important to note that the **Action** column indicates the nature of the utility (e.g., Export, Process Execution, Excel, Copy-Paste, etc.), while the **Run Type** column specifies how it will be executed (Normal, in Background, or Scheduled).

When clicking on the **Run** action, one of the two available types of pages will typically open for data selection.

Selector: This option only allows us to select the records visible on the page.

Dashboard

The action was executed correctly!

Manage

Open Entity - Dashboard

Clipboard

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Clipboard Pages

Utilities & Notifications

Main Utilities ▾

Description

New promotional spring2024 Discounts	
→ Export Projects	⋮

Folders and Archive

Folders List ▾

Folder ↑	Description
DEMO	Demos
EXCEL	Templates 4 Excel
→ EXPORTS	⋮ Templates for Export Data
EXTERNAL APP	Templates 4 Connectivity

Record Lookup

☐ No. ↑

☒ Description ↑

☐ Bill-to Customer No. ↑

☐ Starting Date ↑

☒ JOB00010	Remodelación de área de rece...	30000	01/03/22
☐ JOB00020	Decorar sala de conferencias	10000	01/03/22
→ ☒ JOB00030	⋮ Muebles de oficina nuevos	20000	01/03/22
☐ P00010	Instalación de S-100 Semi-Aut...	10000	
☐ P00020	Suministros y mantenimiento d...	10000	
☐ P00040	Remodelación de área de rece...	30000	01/03/22

OK

Cancel

Launcher: This option allows us to select data based on the filters configured for this task.

The screenshot shows the 'OE Launcher' window. At the top, there are two buttons: 'Edit List' and 'Launch', with 'Launch' highlighted by a red rectangle. Below these is the 'Template' section with fields for 'Code' (MAKEDOCSALETO), 'Table Name', 'Table ID' (0), and a 'Comment' (we are going to create a sales document with lines from other existing documents.). The 'OE Filters Section' is a table with columns: Field Name, Comment, Operator, Field Value, and Filter String. A red arrow points to the 'Comment' column. The table contains several filter rules, including one for 'Customer' with 'No.' as the field name and 'No. will be the customer for the new document!' as the comment. The 'Field Value' column has a dropdown menu open showing '30000'.

Field Name	Comment	Operator	Field Value	Filter String
→ Customer	No. will be the customer for the new document!	=	30000	
Sales Line				
Document Type	Filter by Doc. Type	=	Order	
Document No.	Filter by Doc. No.			1001..101008
Type	Item Type (Item, Resource, ...)			
No.	The Code for previous Type filter...			

The **Launcher** can contain multiple sections depending on the configuration set by the **Manager** to fulfill its purpose.

Here, we focus on the **Filters** section to visualize the main columns we may encounter. The most important columns are:

- **Operator:** Related to the **Field Value** column, it specifies how the filter is applied.
- **Filter String:** Filters data based on the syntax we are already familiar with in Business Central.
 - Only one of the two options can be used: (**Operator + Field Value**) or **Filter String**.
- **Comment:** This column is optional and configurable by the Manager.

Other sections include:

- **Replace:** Used to substitute values in the retrieved fields.
- **Parameters:** Allows the task to start with an input parameter, such as a price increase for formula calculations.
- **Table Selection:** Displays the structure of the template or task to be executed, providing the opportunity to enable or disable specific lines (tables) before running the process.

All sections and fields depend on the configuration set by the **Manager**, including their visibility and editability.

After executing the utility, whether through the **Selector** page by clicking the **‘OK’** button or via the **Launcher** using the **‘Run’** action, the page will close, and we will be able to view the operation's results in the standard **Business Central notifications** area as well as in the **Open Entity Notifications** section.

Dashboard

The Run Process action was successfully completed!

Manage

Open Entity - Dashboard

Clipboard

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Clipboard Pages

Utilities & Notifications

Main Utilities

Description	Folder	Action	Run Type
New promotional spring2024 Discounts		Run Process	Normal
→ Create an unique Order from other documents		Run Process	Normal

Open Entity Background Notifications

Date	Time	Source	Message	Result	Track
→ 19/01/2025	10:38:37	My Utilities	Run Process	Success	(8671b12c-2d1a-49c5-a364-9e2...

Finally, we have a list containing all our archived data (**Archived List**), which is created either through a task from our **Utilities** or via an action from the **Clipboard**.

Archived List

Manage

Delete Line

Data Recovery

Open Excel

Show Entity

Card

Grid

	Date	Time	Type	Name	Notes	Source Template
1	03/06/2024	3:28:56	User	test custnewdiscounts	test custnewdiscounts	CUSTNEWDI...
2	06/06/2024	18:58:54	User	InventorySandboxDev 06-06-24	Inventory with empty Location	
4	06/08/2024	11:35:09	User	OEIT items	Demo Archive	EXPORTITEMS
5	18/08/2024	2:03:09	User	Customer+Prices+Discounts	Only a Demo	*
6	18/08/2024	2:22:27		Backup Data OE	from sysbackuprestore templa...	SYSAPPBACK.
9	09/10/2024	6:58:00	User	New Discounts		CUSTNEWDI..
0	14/11/2024	10:27:40	User	dos pedidos		CP-COPYSAL.
1	02/12/2024	17:32:11	User	testlinedisc		CUSTNEWDI..
12	02/12/2024	17:49:46	User	test4		CP-COPYSAL.
13	04/01/2025	13:21:24	User	dos pedidos modificado	Borrado manual campo obsole...	CP-COPYSAL.

The columns in the **Archived List** include:

- **Entry No.:** A number automatically generated when the entry is created.
- **Date:** The date when the entry was created.
- **Time:** The time of creation.
- **Data Type:** Indicates whether the data is user-generated or system-generated.
- **Name:** The name provided when the file was created.
- **Notes:** Any observations entered during the file creation process.
- **Template:** The template (if available) that generated the data.

The main actions available in the **Archive List** are:

Manage

- **Delete Line:** Deletes the selected archive entry.
- **Data Recovery:** Initiates the restoration of the archived data to the Business Central tables if the **Source Template** column exists.

Caution should be exercised when using this option, as the data may be outdated or the template may have changed.

Show Entity

Card: Displays the data contained in the archive as a detailed record card.

OE Card Viewer

Archive

Tag

Value

Item

No.

1896-S

Description

Escritorio ATENAS

Inventory

-27

SalesQty.

211

SalesLCY

192609.92

PurchasesQty.

184

PurchasesLCY

144366.4

Item

No.

1900-S

Description

Silla inv. PARÍS, negra

Inventory

-20

SalesQty.

140

SalesLCY

25489

PurchasesQty.

120

PurchasesLCY

18132

Close

Grid: Displays the data as a list.

OE Grid Viewer

Archive

Table

A

B

C

D

E

F

G

H

I

Item

Item

No.

Description

Inventory

SalesQty.

SalesLCY

PurchasesQty.

PurchasesLCY

1896-S	Escritorio ATENAS	-27	211	192609.92	184	144366.4
1900-S	Silla inv. PARÍS, negra	-20	140	25489	120	18132
1900-S-NEW	Silla inv. PARÍS, negra - NEW M...	-5	5	968.5	0	0
1906-S	Pedestal móvil ATENAS	-25	134	58397.2	109	37049.1
1908-S	Silla giratoria LONDRES, azul	3	75	14325	78	11614.2
1920-S	Mesa de conferencia AMBERES	-16	103	67063.3	87	44196
1925-W	Paquete de conferencia 1-6	0	0	0	0	0
1928-S	Lámpara ÁMSTERDAM	-25	199	10984.8	174	7499.4
1929-W	Paquete de conferencia 1-8	0	0	0	0	0
1936-S	Silla invit. BERLÍN, amar.	77	158	30604.6	235	35508.5
1953-W	Sección invitados 1	-49	49	6193.6	0	0
1960-S	Silla inv. ROMA, verde	2	107	20725.9	109	16469.9
1964-S	Silla inv. TOKIO, azul	4	74	14333.8	78	11785.8
1965-W	Paquete de conferencia 2-8	-81	81	19035	0	0
1968-S	Silla giratoria MÉXICO, negra	-60	165	31515	105	15634.5
1969-W	Conjunto de conferencia 1	-7	7	2404.5	0	0
1972-S	Silla giratoria MUNICH, amar.	0	106	20246	106	15783.4
1980-S	Silla giratoria MOSCÚ, roja	0	61	11651	61	9082.9
1988-S	Silla inv. SEUL, roja	0	75	14527.5	75	11332.5

Close