

How to Personalize Fields in Business Central

This guide is based on the Item Card but you can use the guide to personalize any pages in Business Central by following the steps outlined. Whether you're looking to hide unnecessary fields or personalize key metrics, this guide provides the essential instructions to optimize your Business Central environment.

1 To personalize a page, start by Clicking the Settings icon.

The screenshot shows the Business Central interface for 'PRODUCTS CO., INC.'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Popdock', 'ForNAV', 'Shopify', and 'All Reports'. A settings gear icon is highlighted in the top right corner. Below the navigation bar, a table lists various items with columns for Description, Base Unit of Measure, Quantity on Hand, Production BOM No., Routing No., Item Tracking Code, Item Category Code, Gen. Prod. Posting Group, Inventory Posting Group, and Unit Cost.

Description	Bloc...	Base Unit of Measure	Quantity on Hand	Production BOM No.	Routing No.	Item Tracking Code	Item Category Code	Gen. Prod. Posting Group	Inventory Posting Group	Unit C
TMARKET M.O.R VIN 12/32OZ	<input type="checkbox"/>	CASE	1,551	P00008-1000...	RVB0002	LOT.MEG	VI.CASED...12/32.OZ	INV.SALE	EG	19.
NAT BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	0			LOT APPLES	RAW MAT	FRUIT	FRUIT	(
ORG BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	439,123.22			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
ORG GALA APPLE - JCE/SCE	<input type="checkbox"/>	LB	152,420			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
NAT BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	0	P00001-0000...	RT00180	LOT WIP	INGREDIENTS	WIP	WIP	0.
ORG BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	107,440	P00001-0000...	RT00140	LOT WIP	INGREDIENTS	WIP	WIP	0.2
CASE FOR 12/32OZ JCE BTLS	<input type="checkbox"/>	EA	25,688			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.9
CASE FOR 12/16OZ VIN BTLS	<input type="checkbox"/>	EA	7,758			LOT PKG	CONTAINER	PACKAGING	PACKAGING	(
CASE FOR 12/32OZ VIN BTLS	<input type="checkbox"/>	EA	12,160			LOT PKG	CONTAINER	PACKAGING	PACKAGING	(
CASE FOR 18/4/4 SCE CUPS	<input type="checkbox"/>	EA	8,091			LOT PKG	CONTAINER	PACKAGING	PACKAGING	(
CASE FOR 12/6/4 SCE CUPS	<input type="checkbox"/>	EA	3,852			LOT PKG	CONTAINER	PACKAGING	PACKAGING	(
CRTN TRAY FOR 12/25OZ SCE JARS	<input type="checkbox"/>	EA	132,576			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.2
CRTN DIVIDER FOR 12/32OZ JCE CASE	<input type="checkbox"/>	EA	28,538			LOT PKG	CONTAINER	PACKAGING	PACKAGING	1.2
CRTN DIVIDER FOR 12/16OZ VIN CASE	<input type="checkbox"/>	EA	7,869			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 6/4/3.2OZ SCE PCHS	<input type="checkbox"/>	EA	39,024			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.3
M.N.B JUICE - BULK	<input type="checkbox"/>	GAL	0	FORM000072	PRESS01	LOT WIP	JC BULK	WIP	WIP	0.7

2 Click "Personalize"

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Business Central' and 'Environment: ECL-ENV-USA-TEST-FR'. The main menu shows 'PRODUCTS CO., INC.' with various functional areas like Finance, Cash Management, Sales, Purchasing, Popdock, ForNAV, and Shopify. A 'Settings' panel is open on the right, with 'Personalize' highlighted under 'Dynamics 365 Business Central'. Below the menu, a table displays product information with columns for Description, Base Unit of Measure, Quantity on Hand, Production BOM No., Routing No., Item Tracking Code, and Item Category Code.

Description	Bloc...	Base Unit of Measure	Quantity on Hand	Production BOM No.	Routing No.	Item Tracking Code	Item Category Code	Gen. Prod. Posting Group	Inventory Posting Group	Unit Co
TMARKET M.O.R VIN 12/32OZ	<input type="checkbox"/>	CASE	1.551	P00008:1000...	RV80002	LOT.MFG	VI.CASED...12/32OZ	INV.SALE	EG	19.0
NAT BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	0			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
ORG BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	439,123.22			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
ORG GALA APPLE - JCE/SCE	<input type="checkbox"/>	LB	152.420			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
NAT BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	0	P00001-0000...	RT00180	LOT WIP	INGREDIENTS	WIP	WIP	0.0
ORG BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	107.440	P00001-0000...	RT00140	LOT WIP	INGREDIENTS	WIP	WIP	0.2
CASE FOR 12/32OZ JCE BTLS	<input type="checkbox"/>	EA	25.688			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.9
CASE FOR 12/16OZ VIN BTLS	<input type="checkbox"/>	EA	7.758			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 12/32OZ VIN BTLS	<input type="checkbox"/>	EA	12.160			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 18/4/4 SCE CUPS	<input type="checkbox"/>	EA	8.091			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 12/6/4 SCE CUPS	<input type="checkbox"/>	EA	3.852			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CRTN TRAY FOR 12/25OZ SCE JARS	<input type="checkbox"/>	EA	132.576			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.2
CRTN DIVIDER FOR 12/32OZ JCE CASE	<input type="checkbox"/>	EA	28.538			LOT PKG	CONTAINER	PACKAGING	PACKAGING	1.2
CRTN DIVIDER FOR 12/16OZ VIN CASE	<input type="checkbox"/>	EA	7.869			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 6/4/3.2OZ SCE PCHS	<input type="checkbox"/>	EA	39.024			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
M.N.B JUICE - BULK	<input type="checkbox"/>	GAL	0	FORM000072	PRESS01	LOT WIP	JC BULK			

3 To remove a column: Click on the Column name, in this example "Routing No."

The screenshot shows the Dynamics 365 Business Central interface with the 'Routing No.' column header highlighted by a red circle. The table below shows the same data as in the previous screenshot, but with additional columns for 'Gen. Prod. Posting Group' and 'Inventory Posting Group' visible. A 'Clear personalization...' button is visible at the top right of the table area.

Description	Bloc...	Base Unit of Measure	Quantity on Hand	Production BOM No.	Routing No.	Item Tracking Code	Item Category Code	Gen. Prod. Posting Group	Inventory Posting Group	Unit Co
TMARKET M.O.R VIN 12/32OZ	<input type="checkbox"/>	CASE	1.551	P00008:1000...	RV80002	LOT.MFG	VI.CASED...12/32OZ	INV.SALE	EG	19.0
NAT BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	0			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
ORG BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	439,123.22			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
ORG GALA APPLE - JCE/SCE	<input type="checkbox"/>	LB	152.420			LOT APPLES	RAW MAT	FRUIT	FRUIT	0.2
NAT BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	0	P00001-0000...	RT00180	LOT WIP	INGREDIENTS	WIP	WIP	0.0
ORG BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	107.440	P00001-0000...	RT00140	LOT WIP	INGREDIENTS	WIP	WIP	0.2
CASE FOR 12/32OZ JCE BTLS	<input type="checkbox"/>	EA	25.688			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.9
CASE FOR 12/16OZ VIN BTLS	<input type="checkbox"/>	EA	7.758			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 12/32OZ VIN BTLS	<input type="checkbox"/>	EA	12.160			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 18/4/4 SCE CUPS	<input type="checkbox"/>	EA	8.091			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CASE FOR 12/6/4 SCE CUPS	<input type="checkbox"/>	EA	3.852			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7
CRTN TRAY FOR 12/25OZ SCE JARS	<input type="checkbox"/>	EA	132.576			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.2
CRTN DIVIDER FOR 12/32OZ JCE CASE	<input type="checkbox"/>	EA	28.538			LOT PKG	CONTAINER	PACKAGING	PACKAGING	1.2
CRTN DIVIDER FOR 12/16OZ VIN CASE	<input type="checkbox"/>	EA	7.869			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7

4

Click "Hide" and that column will be removed from the page. You can add it back anytime.

Business Central

Environment: ECL-ENV-USA-TEST-FR

PRODUCTS CO., INC. | Finance | Cash Management | Sales | Purchasing | Popdock | ForNAV | Shopify | All Reports

the sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

Description	Bloc...	Base Unit of Measure	Quantity on Hand	Production BOM No.	Routing No.	Gen. Prod. Posting Group	Inventory Posting Group	Unit C...		
TMARKET M.O.R VIN 12/32OZ	<input type="checkbox"/>	CASE	1,551	P00008-1000...	RV80002	32.OZ	INV.SALE	EG	19.	
NAT BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	0			FRUIT	FRUIT			
ORG BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	439,123.22			FRUIT	FRUIT	0.2		
ORG GALA APPLE - JCE/SCE	<input type="checkbox"/>	LB	152,420			FRUIT	FRUIT	0.2		
NAT BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	0	P00001-0000...	RT00180	LOT WIP	INGREDIENTS	WIP	WIP	0.
ORG BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	107,440	P00001-0000...	RT00140	LOT WIP	INGREDIENTS	WIP	WIP	0.2
CASE FOR 12/32OZ JCE BTLs	<input type="checkbox"/>	EA	25,688			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.9
CASE FOR 12/16OZ VIN BTLs	<input type="checkbox"/>	EA	7,758			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.
CASE FOR 12/32OZ VIN BTLs	<input type="checkbox"/>	EA	12,160			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.
CASE FOR 18/4/4 SCE CUPS	<input type="checkbox"/>	EA	8,091			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.
CASE FOR 12/6/4 SCE CUPS	<input type="checkbox"/>	EA	3,852			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.
CRTN TRAY FOR 12/25OZ SCE JARS	<input type="checkbox"/>	EA	132,576			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.2
CRTN DIVIDER FOR 12/32OZ JCE CASE	<input type="checkbox"/>	EA	28,538			LOT PKG	CONTAINER	PACKAGING	PACKAGING	1.2
CRTN DIVIDER FOR 12/16OZ VIN CASE	<input type="checkbox"/>	EA	7,869			LOT PKG	CONTAINER	PACKAGING	PACKAGING	0.7

5

To move a column: In this example, Click on the column "Sales Unit of Measure" and drag the column to the desired place on the page

Business Central

Environment: ECL-ENV-USA-TEST-FR

PRODUCTS CO., INC. | Finance | Cash Management | Sales | Purchasing | Popdock | ForNAV | Shopify | All Reports

the sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

Item Category Code	Gen. Prod. Posting Group	Inventory Posting Group	Unit Cost	Stock Unit Exists	Purch. Unit of Measure	Sales Unit of Measure	Qty. on Purch. Order	Qty. on Sales Order	Qty. on Component Lines	Qty. on Prod. Order
VLCASED...12/32.OZ	INV.SALE	EG	19.7966	No	CASE	CASE	0	50	0	0
RAW MAT	FRUIT	FRUIT	0.235	No	LB	LB	0	0	0	0
RAW MAT	FRUIT	FRUIT	0.24253	Yes	LB	LB	4,882,025	0	11,650	0
RAW MAT	FRUIT	FRUIT	0.22567	Yes	LB	LB	1,192,000	0	0	0
INGREDIENTS	WIP	WIP	0.2707	No	LB	LB	0	0	0	0
INGREDIENTS	WIP	WIP	0.27332	No	LB	LB	0	0	472,774	500
CONTAINER	PACKAGING	PACKAGING	0.98212	No	EA	EA	22,000	0	4,495	0
CONTAINER	PACKAGING	PACKAGING	0.737	No	EA	EA	0	0	0	0
CONTAINER	PACKAGING	PACKAGING	0.955	No	EA	EA	0	0	3,545	0
CONTAINER	PACKAGING	PACKAGING	0.914	No	EA	EA	0	0	1,182	0
CONTAINER	PACKAGING	PACKAGING	0.749	No	EA	EA	40,000	0	3,153	0
CONTAINER	PACKAGING	PACKAGING	0.24995	No	EA	EA	0	0	10,527	0
CONTAINER	PACKAGING	PACKAGING	1.28526	No	EA	EA	23,000	0	4,450	0
CONTAINER	PACKAGING	PACKAGING	0.76961	No	EA	EA	0	0	0	0

6 To add a field to the screen that is currently not visible to you: Click "Field"

Dynamics 365 Business Central

Environment: ECL-ENV-USA-TEST-FR

Personalizing: Items + Field Clear personalization...

MANZANA PRODUCTS CO., INC. Finance Cash Management Sales Purchasing Popdock ForNAV Shopify All Reports

Items: All + New Delete Home Item Special Prices & Discounts Attributes Report EDI Actions

× You can get the sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

No. ↑	Gen. Prod. Posting Group	Inventory Posting Group	Unit Cost	Stock... Unit Exists	GTIN	Qty. on Purch. Order	Qty. on Sales Order	Qty. on Prod. Order	Qty. on Component Lines	Purch. Unit of Measure	Sales Unit of Measure	QA Item Group C
100006	INV.SALE	EG	19.7966	No		0	50	0	0	CASE	CASE	EGQU
100023	FRUIT	FRUIT	0.235	No		0	0	0	0	LB	LB	APLRE
100024	FRUIT	FRUIT	0.24253	Yes		4,882,025	0	0	11,650	LB	LB	APLRE
100025	FRUIT	FRUIT	0.22567	Yes		1,192,000	0	0	0	LB	LB	APLRE
100026	WIP	WIP	0.2707	No		0	0	0	0	LB	LB	
100027	WIP	WIP	0.27332	No		0	0	500	472,774	LB	LB	
100029	PACKAGING	PACKAGING	0.98212	No		22,000	0	0	4,495	EA	EA	
100030	PACKAGING	PACKAGING	0.737	No		0	0	0	0	EA	EA	
100031	PACKAGING	PACKAGING	0.955	No		0	0	0	3,545	EA	EA	
100032	PACKAGING	PACKAGING	0.914	No		0	0	0	1,182	EA	EA	
100033	PACKAGING	PACKAGING	0.749	No		40,000	0	0	3,153	EA	EA	
100034	PACKAGING	PACKAGING	0.24995	No		0	0	0	10,527	EA	EA	
100036	PACKAGING	PACKAGING	1.28526	No		23,000	0	0	4,450	EA	EA	
100037	PACKAGING	PACKAGING	0.76961	No		0	0	0	0	EA	EA	

7 Search the list of fields or scroll to the field: Drag and drop to screen

sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

Description	Block	Base Unit of Measure	Quantity on Hand	Production BOM No.	Item Tracking Code	Item Category Code	Gen. Prod. Posting Group	Inven Postir
MARKET M.O.R. VIN 12/32OZ		CASE	1.551	P00008-1000...	LOT.MER	XL.CASED...12/32.OZ	INV.SALE	ES
IAT BLEND APPLE - JCE/SCE		LB	0		LOT APPLES	RAW MAT	FRUIT	FF
IRG BLEND APPLE - JCE/SCE		LB	439,123.22		LOT APPLES	RAW MAT	FRUIT	FF
IRG GALA APPLE - JCE/SCE		LB	152,420		LOT APPLES	RAW MAT	FRUIT	FF
IAT BLEND APPLE PUREE - BULK		LB	0	P00001-0000...	LOT WIP	INGREDIENTS	WIP	W
IRG BLEND APPLE PUREE - BULK		LB	107,440	P00001-0000...	LOT WIP	INGREDIENTS	WIP	W
ASE FOR 12/32OZ JCE BTLS		EA	25,688		LOT PKG	CONTAINER	PACKAGING	PF
ASE FOR 12/16OZ VIN BTLS		EA	7,758		LOT PKG	CONTAINER	PACKAGING	PF
ASE FOR 12/32OZ VIN BTLS		EA	12,160		LOT PKG	CONTAINER	PACKAGING	PF
ASE FOR 18/4/4 SCE CUPS		EA	8,091		LOT PKG	CONTAINER	PACKAGING	PF
ASE FOR 12/6/4 SCE CUPS		EA	3,852		LOT PKG	CONTAINER	PACKAGING	PF
RTN TRAY FOR 12/25OZ SCE JARS		EA	132,576		LOT PKG	CONTAINER	PACKAGING	PF
RTN DIVIDER FOR 12/32OZ JCE CASE		EA	28,538		LOT PKG	CONTAINER	PACKAGING	PF
RTN DIVIDER FOR 12/16OZ VIN CASE		EA	7,869		LOT PKG	CONTAINER	PACKAGING	PF
ASE FOR 6/4/3.2OZ SCE PCHS		EA	39,024		LOT PKG	CONTAINER	PACKAGING	PF
M.N.B JUICE - BULK		GAL	0	FORM000072	LOT WIP	JC BULK	WIP	W
M.O.GA JUICE - BULK - DMSTC		GAL	0	P00001-0000...	LOT WIP	JC BULK	WIP	W

Place fields by dragging from the list to a position on the page.

Recommended fields

- Lead Time Calculation
- Option Manufacturing Policy
- Decimal Overhead Rate
- Option Price/Profit Calculation
- Decimal Profit %
- Option Replenishment System
- Code Routing No.
- Code Search Description
- Code Shelf No.
- Decimal Standard Cost
- Boolean Substitutes Exist
- Code Tariff No.

Routing No.

Specifies the production route that contains the operations needed to manufacture this item.

- Code type (max size 20)
- Defined by the page
- From Base Application (Microsoft)

8

Once Personalization is completed Click "Done". Refresh the page

Business Central

Environment: ECL-ENV-USA-TEST-FR

ams + Field Clear personalization... Done Less

ODOCTS CO., INC. < Finance Cash Management Sales Purchasing Popdock ForN# >

+ New Delete Home Item Special Prices & Discounts Attributes ...

sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

description	Bloc...	Base Unit of Measure	Quantity on Hand	Production BOM No.	Routing No.	Item Tracking Code	Item Category Code	Gen. l Postir
MARKET M.O.R VIN 12/32OZ	<input type="checkbox"/>	CASE	1.551	P00008-1000...	RY80002	LOT.MER	XL.CASED..12/32.OZ	IN
IAT BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	0			LOT APPLES	RAW MAT	FF
IRG BLEND APPLE - JCE/SCE	<input type="checkbox"/>	LB	439.123.22			LOT APPLES	RAW MAT	FF
IRG GALA APPLE - JCE/SCE	<input type="checkbox"/>	LB	152.420			LOT APPLES	RAW MAT	FF
IAT BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	0	P00001-0000...	RT00180	LOT WIP	INGREDIENTS	W
IRG BLEND APPLE PUREE - BULK	<input type="checkbox"/>	LB	107.440	P00001-0000...	RT00140	LOT WIP	INGREDIENTS	W
ASE FOR 12/32OZ JCE BTLs	<input type="checkbox"/>	EA	25.688			LOT PKG	CONTAINER	PF
ASE FOR 12/16OZ VIN BTLs	<input type="checkbox"/>	EA	7.758			LOT PKG	CONTAINER	PF
ASE FOR 12/32OZ VIN BTLs	<input type="checkbox"/>	EA	12.160			LOT PKG	CONTAINER	PF
ASE FOR 18/4/4 SCE CUPS	<input type="checkbox"/>	EA	8.091			LOT PKG	CONTAINER	PF
ASE FOR 12/6/4 SCE CUPS	<input type="checkbox"/>	EA	3.852			LOT PKG	CONTAINER	PF
RTN TRAY FOR 12/25OZ SCE JARS	<input type="checkbox"/>	EA	132.576			LOT PKG	CONTAINER	PF
RTN DIVIDER FOR 12/32OZ JCE CASE	<input type="checkbox"/>	EA	28.538			LOT PKG	CONTAINER	PF
RTN DIVIDER FOR 12/16OZ VIN CASE	<input type="checkbox"/>	EA	7.869			LOT PKG	CONTAINER	PF

Add Field to Page

Place fields by dragging from the list to a position on the page.

Recommended fields

- Lead Time Calculation
- Option Manufacturing Policy
- Decimal Overhead Rate
- Option Price/Profit Calculation
- Decimal Profit %
- Option Replenishment System
- Code Search Description
- Code Shelf No.
- Decimal Standard Cost
- Boolean Substitutes Exist