



Data Editor Tool - Functional Guide

Table of Contents








1. Introduction
2. Getting Started
3. Core Features
 - Loading Table Data
 - Filtering Records
 - Field Management
 - Data Editing
 - Find & Replace
 - Record Management
 - Data Import/Export
4. Advanced Features
 - Rename Primary Keys
 - Update Operations
 - Sorting
5. Configuration
 - Data Editor Setup

- Logging
 - Run After Feature
6. Best Practices
 7. FAQ & Troubleshooting
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Introduction

Data Editor Tool is a free, open-source extension for Microsoft Dynamics 365 Business Central that simplifies table data management. This powerful tool allows users to easily view, edit, import, export, and manipulate table records through an intuitive interface.

Key Benefits

-  Direct table data manipulation
-  Bulk data operations
-  Advanced filtering and sorting
-  Import/Export capabilities
-  Primary key renaming
-  Comprehensive logging
-  MIT License (completely free)

Developer Information

- **Developer:** Volodymyr Dvernytskyi
 - **License:** MIT License
 - **Support:** support@volodver.com
-

Getting Started

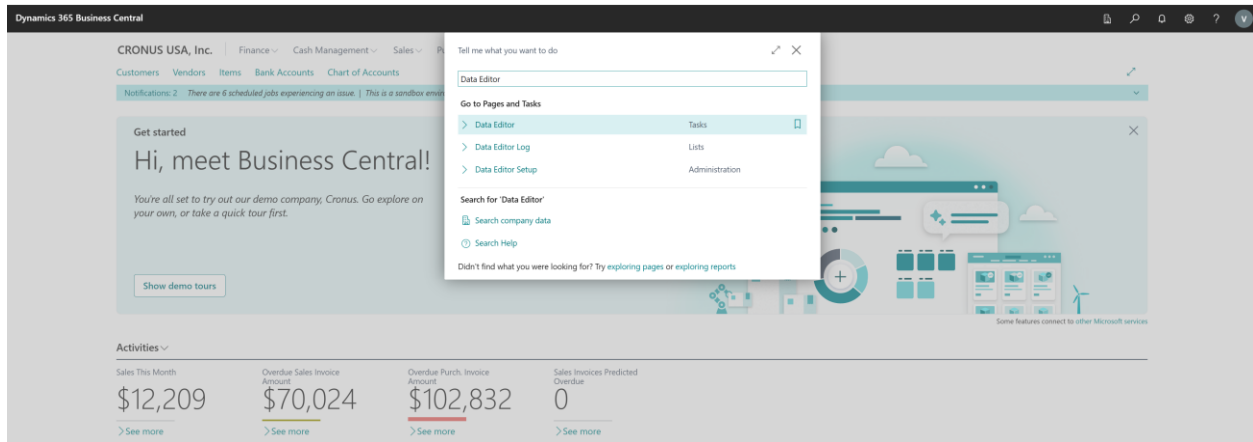
Installation

1. Download the Data Editor Tool from the Microsoft AppSource or GitHub repository
2. Install the extension in your Business Central environment
3. Assign necessary "**Data Editor Tool**" or "**SUPER**" permissions to users who will use the tool

Opening the Data Editor

To access the Data Editor Tool:

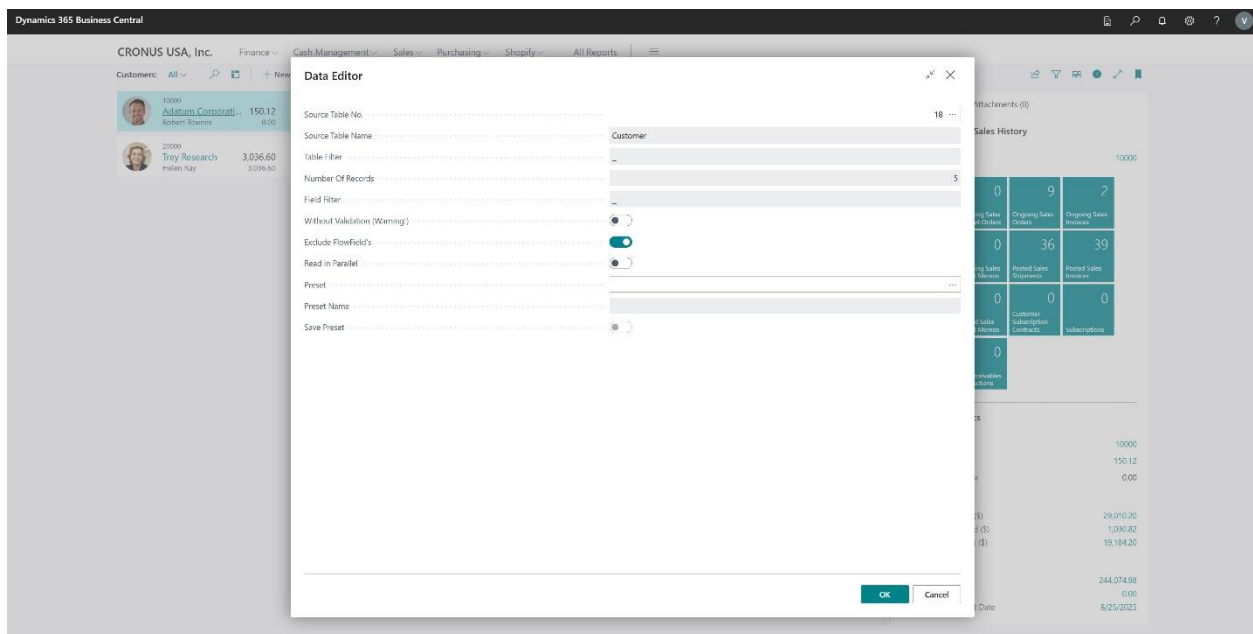
1. Use the search box in Business Central (Alt+Q)
2. Type "Data Editor"
3. Select "Data Editor" from the search results



Core Features

Loading Table Data

The Data Editor allows you to load any table data from your Business Central database with a simple interface.



How to Load Table Data:

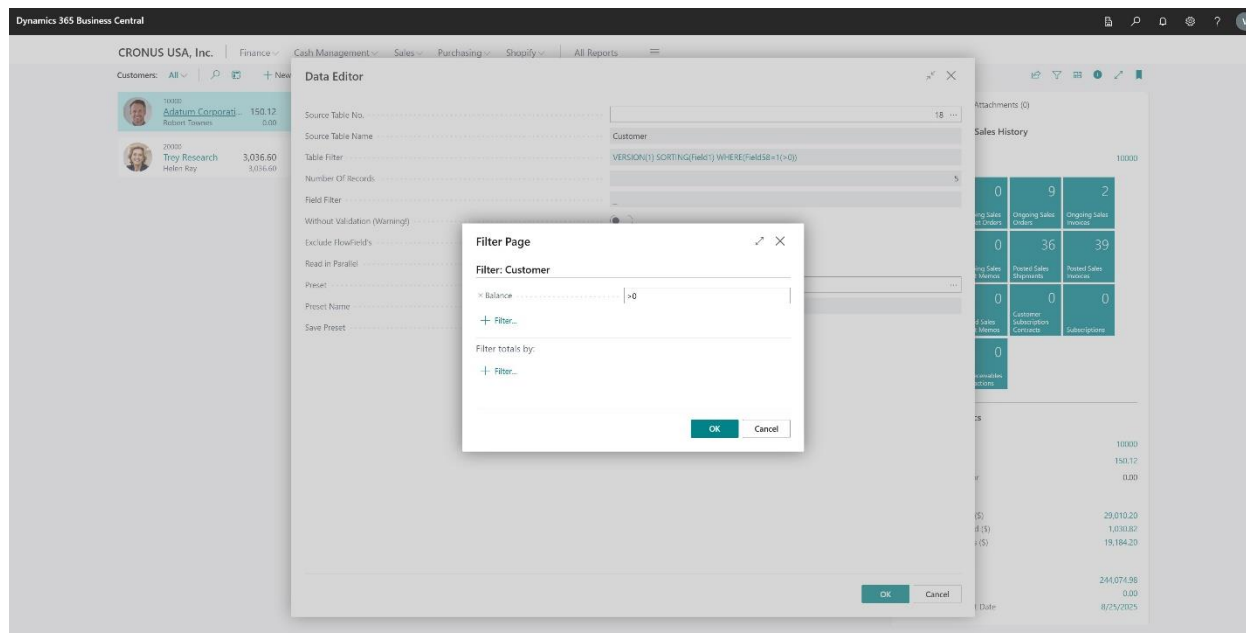
1. Open the Data Editor from the search box
2. Select the table you want to load from the dropdown list
3. Configure any desired filters or settings (optional)
4. Click "Load" to retrieve the data

The tool will display all records from the selected table in an editable grid format.

Filtering Records

Filtering Before Load

You can filter records before loading them to work with specific data sets without loading entire tables.

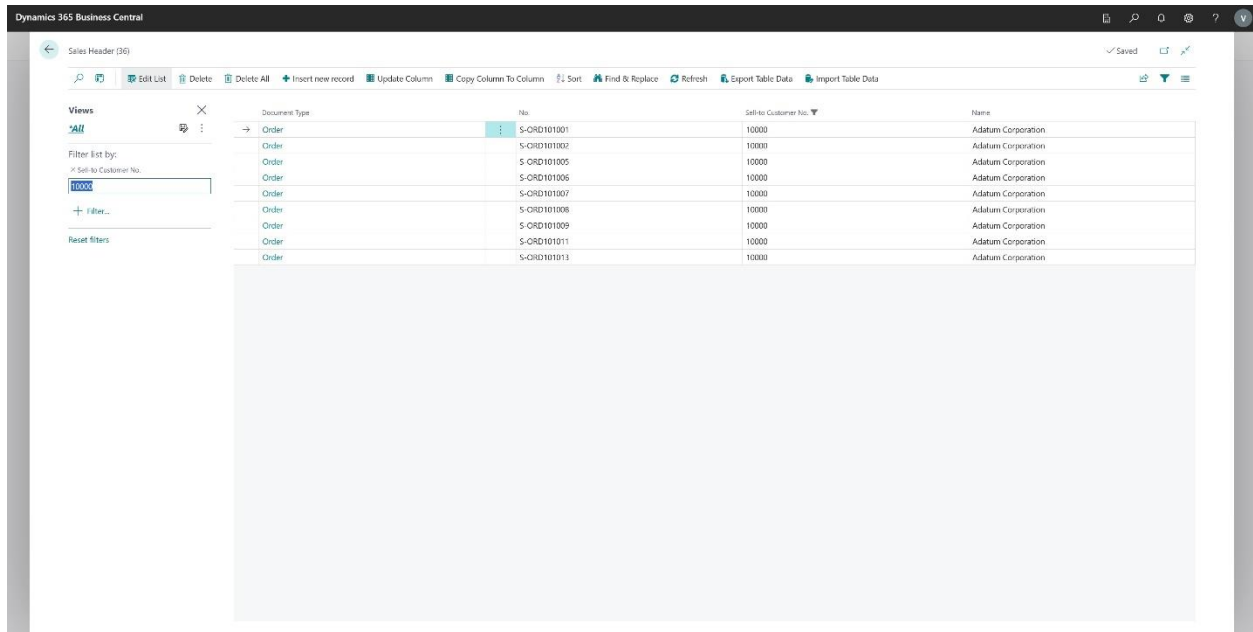


Steps to Filter Before Loading:

1. After selecting a table, click on "Filters" before loading
2. Add field filters by selecting:
 - Field name
 - Filter operator (=, <>, >, <, etc.)
 - Filter value
3. Add multiple filters as needed
4. The "Number of Records" field will show the count based on your filters
5. Click "OK" to retrieve filtered data

Filtering After Load

Once data is loaded, you can apply additional filters similar to standard Business Central pages.



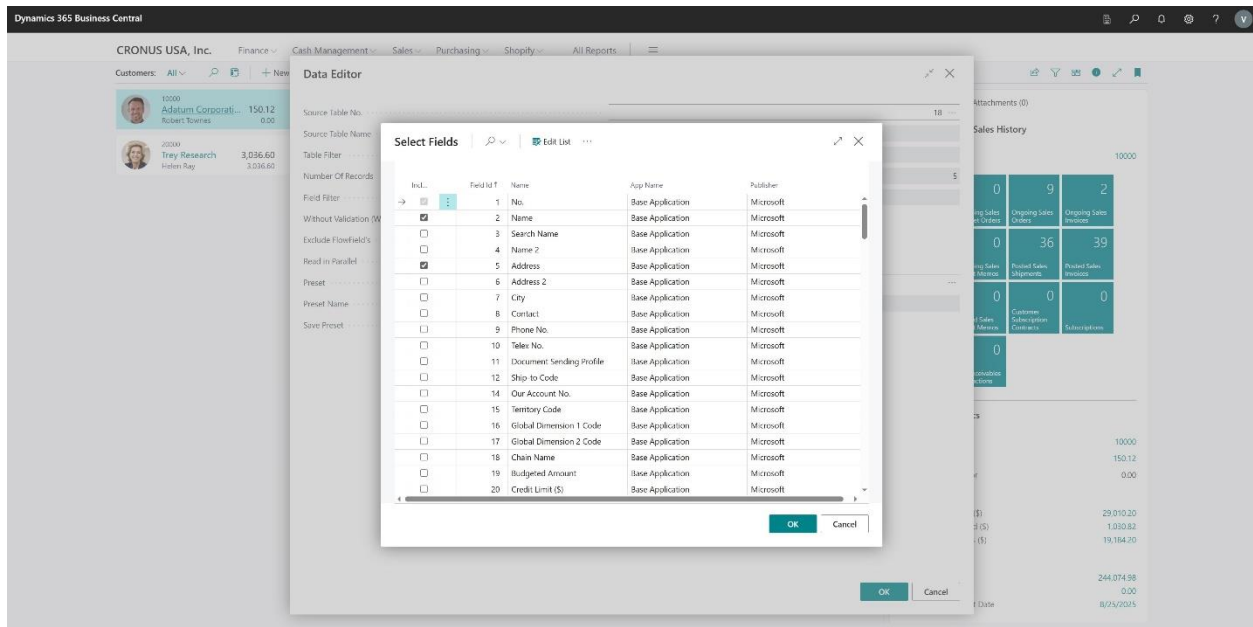
How to Filter Loaded Data:

- Use the filter pane on the right side
- Apply quick filters directly on column headers
- Use standard Business Central filter syntax

Field Management

Filter Fields Set

Control which fields are loaded and displayed for better performance and clarity.



Managing Field Sets:

- ### Without Validation

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Shopping | All Reports

Customers: All | Search | + New

Customer	Balance	Open Invoices
10000 Adam Corporation Robert Thomas	150.12 0.00	
20000 Trey Research Heidi Ray	3,036.60 3,036.60	

Data Editor

Source Table No. 18

Source Table Name Customer

Table Filter VERSON(1) SORTING(1) WHERE(InvDate = 1) <= 0

Number Of Records 5

Field Filter 1-25

Without Validation (Warning) ☒

Exclude RowFields ☒

Read in Parallel ☐

Preset

Preset Name

Save Preset ☐

OK Cancel

Sales History

Category	Open Invoices	Open Orders	Open Sales Invoices
Open Sales Invoices	0	9	2
Open Sales Orders	0	36	39
Open Sales Invoices	0	0	0
Open Sales Orders	0	0	0

10000

150.12
0.00

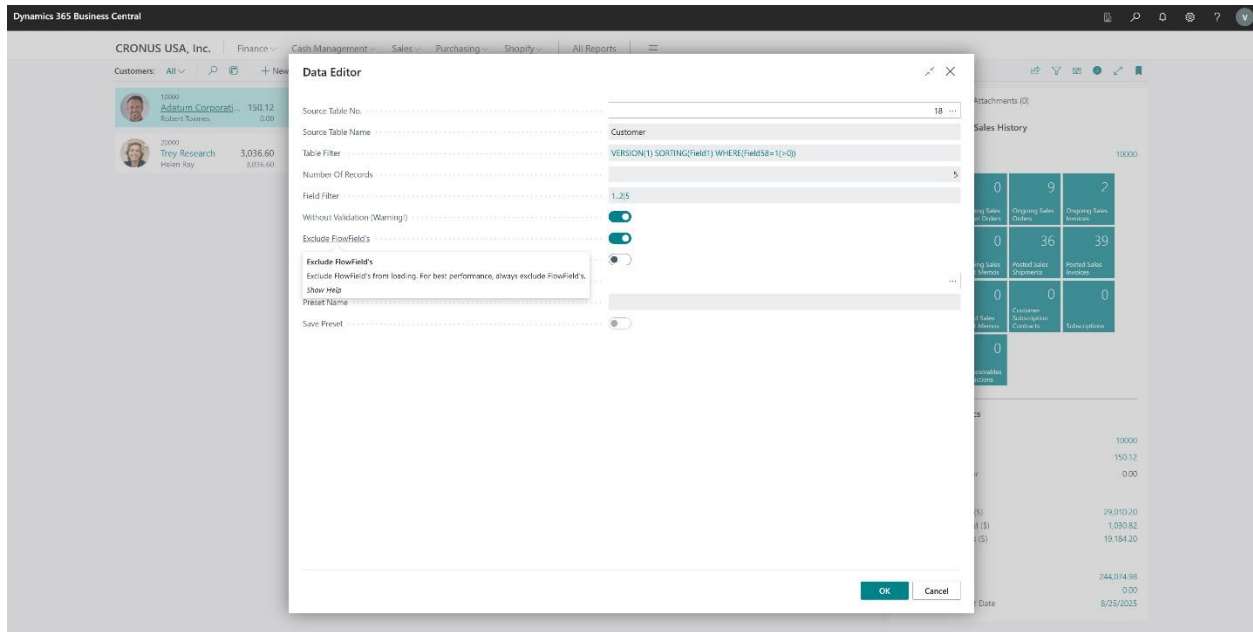
29,010.20
1,030.87
19,184.20

344,074.98
0.00
8/25/2023

- Bulk data corrections
- Bypassing business logic temporarily
- Data migration scenarios

Exclude FlowFields

Improve performance by excluding FlowFields from loading (enabled by default).



Benefits:

- Faster data loading
- Reduced server load
- Better performance with large datasets

Data Editing

Direct Edit

Edit values directly in the page fields with inline editing capability.

Dynamics 365 Business Central

Customer (18)

✓ Saved

Edit List Delete Delete All Insert new record Update Column Copy Column To Column Sort Find & Replace Refresh Export Table Data Import Table Data

No.	Name	Address
10000	Adatum Corporation NEW VALUE	192 Market Square
20000	Trey Research	153 Thomas Drive
30000	School of Fine Art	10 High Tower Green
40000	Alpine Ski House	10 Deerfield Road
50000	Reflecloud	25 Water Way

How to Use Direct Edit:

1. Click on any cell in the grid
2. Type the new value
3. Press Enter or Tab to save
4. Values are saved as text format

Note: For dates and numbers, ensure correct formatting when using direct edit.

Modal Edit

For more precise editing with proper data type handling, use the Modal Edit feature.

Dynamics 365 Business Central

Sales Header (36)

✓ Saved

Edit List Delete Delete All Insert new record Update Column Copy Column To Column Sort Find & Replace Refresh Export Table Data Import Table Data

Document Type	No.	Sell-to Customer No.	Name
Order	S-ORD101001	10000	Adatum Corporation
Order	S-ORD101002	10000	Adatum Corporation
Order	S-ORD101003	30000	School of Fine Art
Order	S-ORD101004	40000	Alpine Ski House
Order	S-ORD101005	10000	Adatum Corporation
Order	S-ORD101006	10000	Adatum Corporation
Order	S-ORD101007	10000	Adatum Corporation
Order	S-ORD101008	10000	Adatum Corporation
Order	S-ORD101009	10000	Adatum Corporation
Order	S-ORD101010		Adatum Corporation
Order	S-ORD101011		Adatum Corporation
Order	S-ORD101012		Adatum Corporation

Sell-to Customer No.

10000

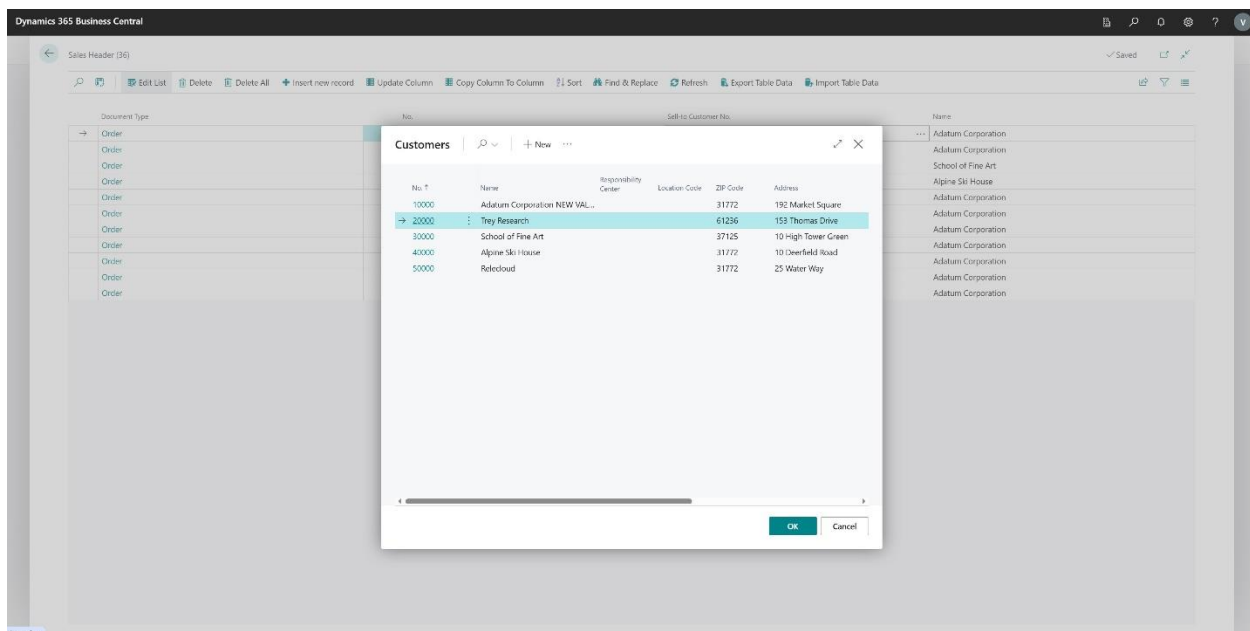
OK Cancel

Using Modal Edit:

1. Click the three dots (...) button in any cell
2. A modal window opens with:
 - Correct data type validation
 - Lookup functionality for related tables
 - Date picker for date fields
 - Number formatting for numeric fields
3. Enter or select the new value
4. Click "OK" to save changes

Dynamic Table Relations

When editing fields with table relations, the lookup functionality is automatically available.

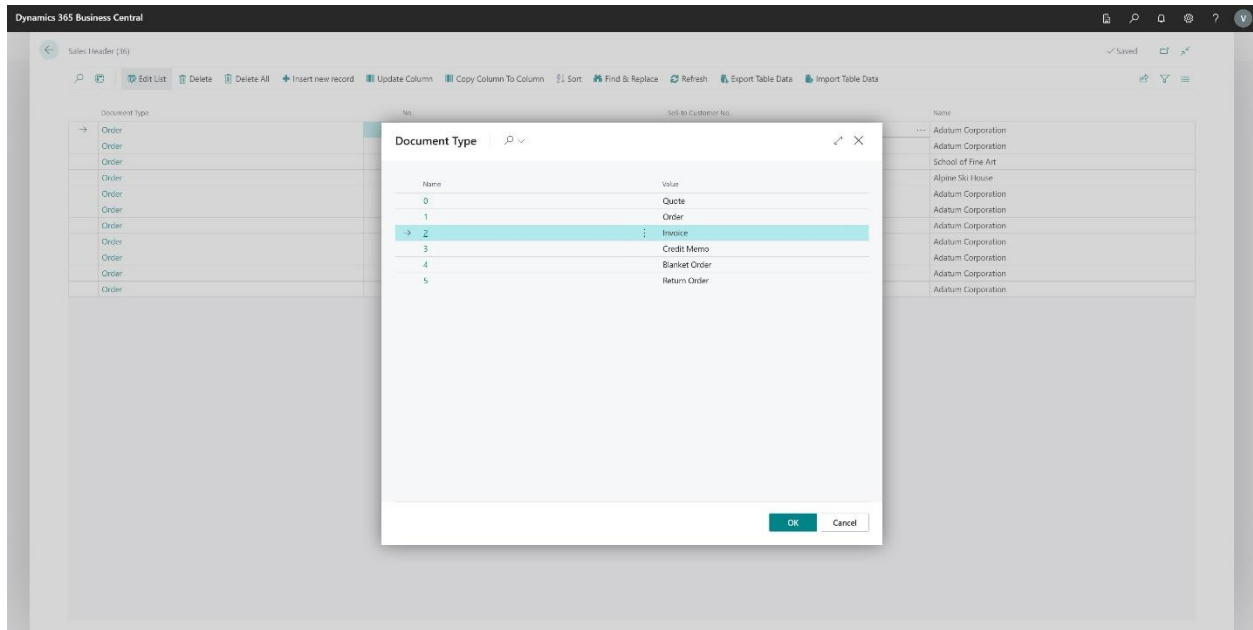


Example: When editing "Sell-To Customer No." on a Sales Header:

1. Click the three dots (...)
2. Click the lookup button in the modal
3. Select the customer from the list
4. The field is updated with the selected value

Enum and Option Selection

Easily change ENUM and Option fields with dropdown selection.

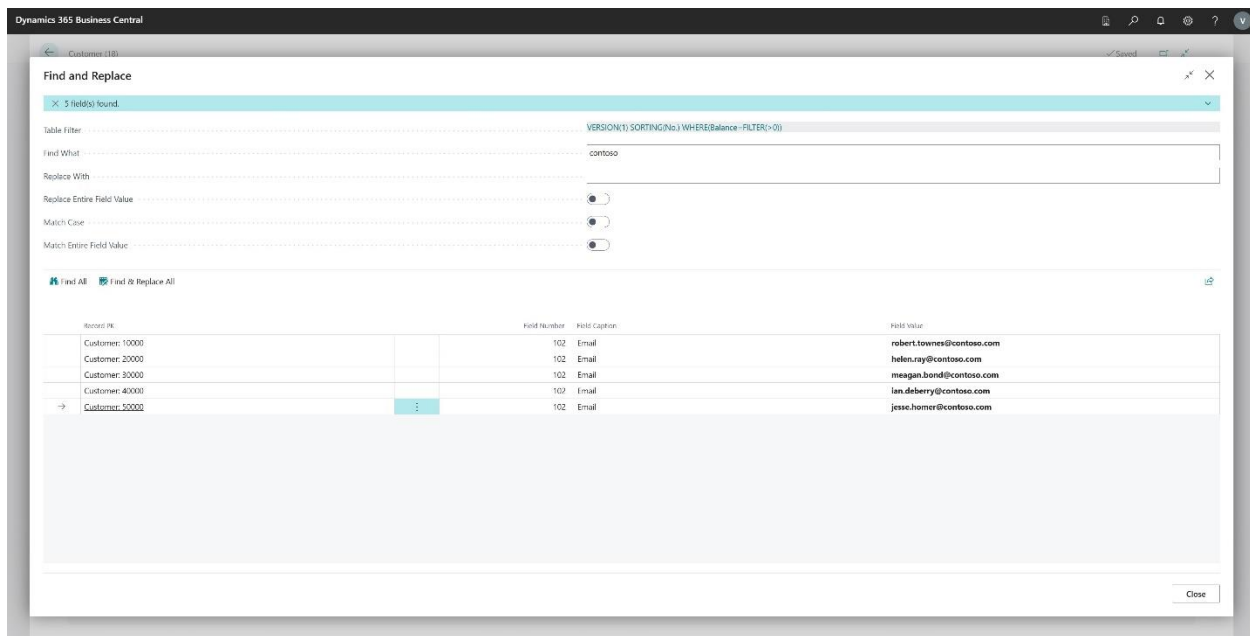


How to Change Enums/Options:

1. Click on an enum or option field
2. A dropdown list appears with available values
3. Select the desired option
4. The change is applied immediately

Find & Replace

Powerful search and replace functionality similar to Excel but working directly with Business Central data.



Features:

- Find specific values across all fields
- Replace values with filtering options
- Change specific values for specific entries
- Bulk replace operations

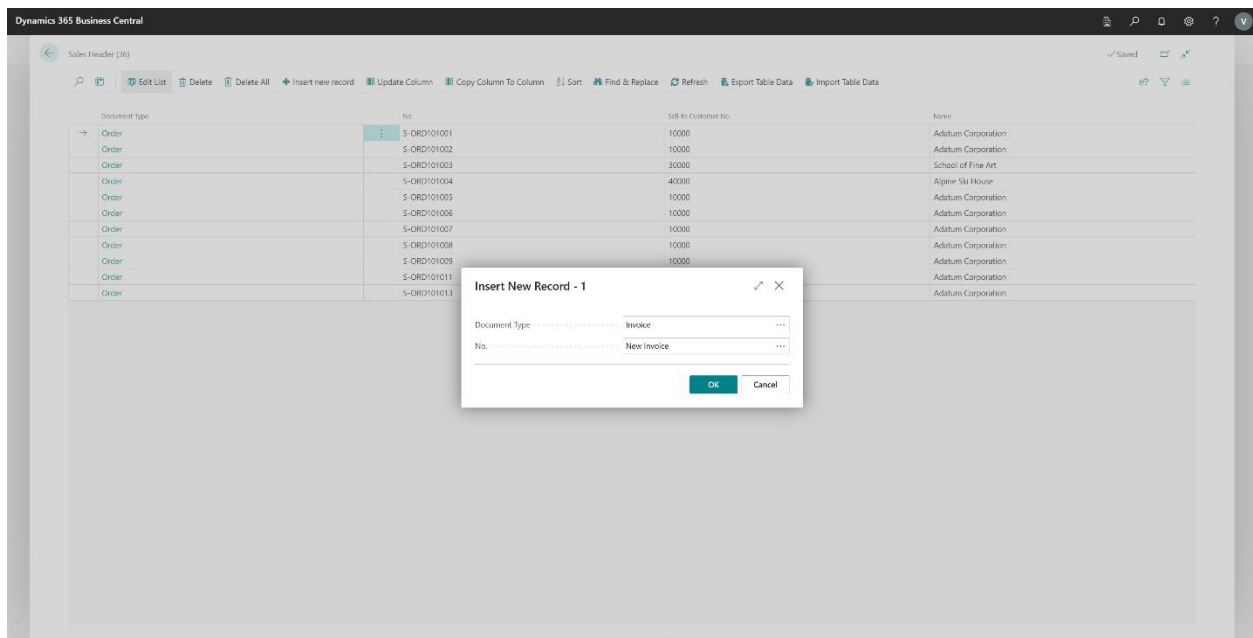
How to Use Find & Replace:

1. Click "Find & Replace" button
2. Enter search criteria:
 - Field to search (or all fields)
 - Value to find
 - Value to replace with (optional)
3. Review found results
4. Choose to replace:
 - Individual occurrences
 - All occurrences
 - Filtered occurrences

Record Management

Insert New Record

Add new records directly to the opened table.

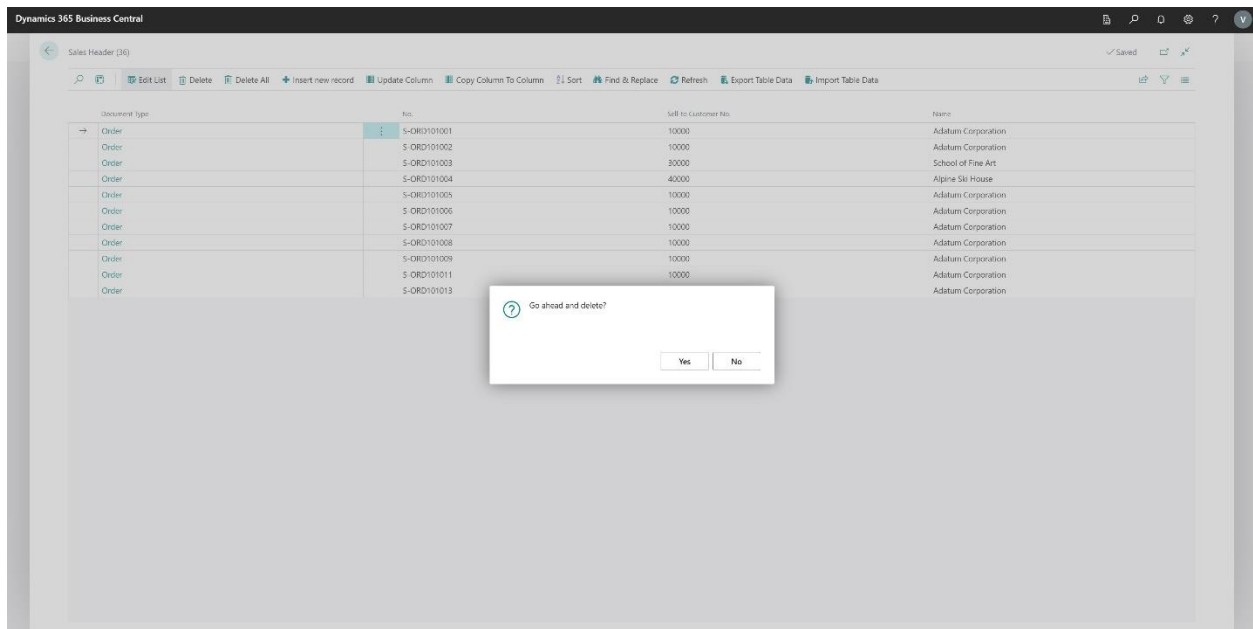


Steps to Insert a Record:

1. Click "New" button
2. Fill in required fields in the new row
3. Complete all mandatory fields
4. The record is saved automatically

Delete Record

Remove records from tables with confirmation.



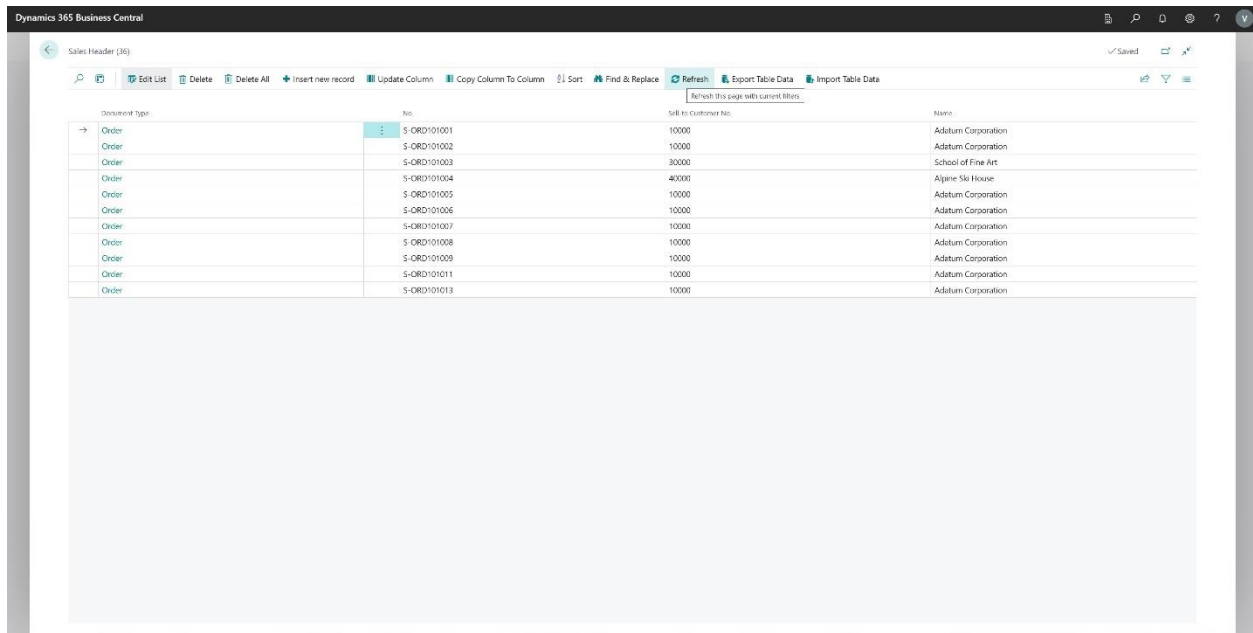
How to Delete Records:

1. Select the record(s) to delete

2. Click "Delete" button
3. Confirm the deletion
4. Records are permanently removed

Refresh Data

Get the latest changes from Business Central tables.



When to Refresh:

- After other users make changes
- To verify your modifications
- Before starting new edits

The refresh feature is optimized for quick data reloading.

Advanced Features

Rename Primary Keys

Unique capability to change primary key values with support for up to 15 values in the primary key.

Dynamics 365 Business Central

Sales Header (10)

✓ Saved

Edit List | Delete | Delete All | Insert new record | Update Column | Copy Column To Column | Sort | Find & Replace | Refresh | Export Table Data | Import Table Data

Document Type	No.	Sell-to Customer No.	Name
Order	S-ORD101001 NEW PR	10000	Adatum Corporation
Order	S-ORD101002	10000	Adatum Corporation
Order	S-ORD101003	30000	Schoel of Fine Art
Order	S-ORD101004	40000	Alpine Ski House
Order	S-ORD101005	10000	Adatum Corporation
Order	S-ORD101006	10000	Adatum Corporation
Order	S-ORD101007	10000	Adatum Corporation
Order	S-ORD101008	10000	Adatum Corporation
Order	S-ORD101009	10000	Adatum Corporation
Order	S-ORD101011	10000	Adatum Corporation
Order	S-ORD101013	10000	Adatum Corporation

How to Rename Primary Keys:

1. Select a record with the primary key to rename
2. Click "Rename Primary Key"
3. Enter new primary key values
4. Confirm the change

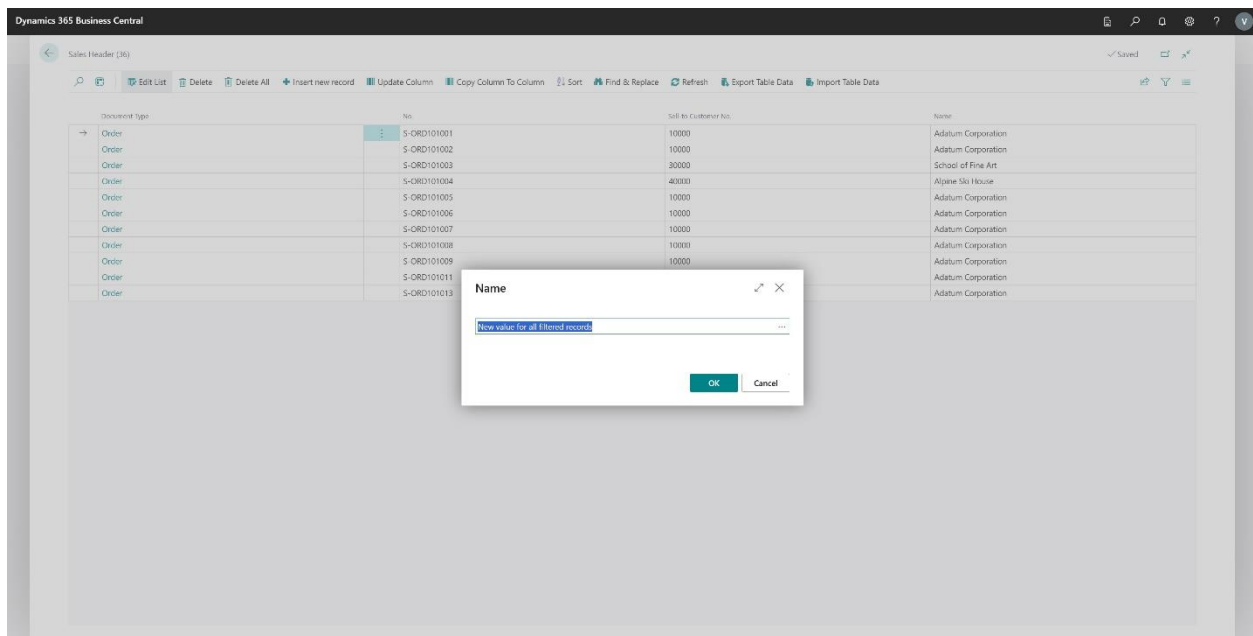
Limitations:

- Cannot change Enum/Option to 0 or from 0 to another value
- Some system tables may have restrictions

Update Operations

Update Column

Update a specific field value for all filtered records at once.

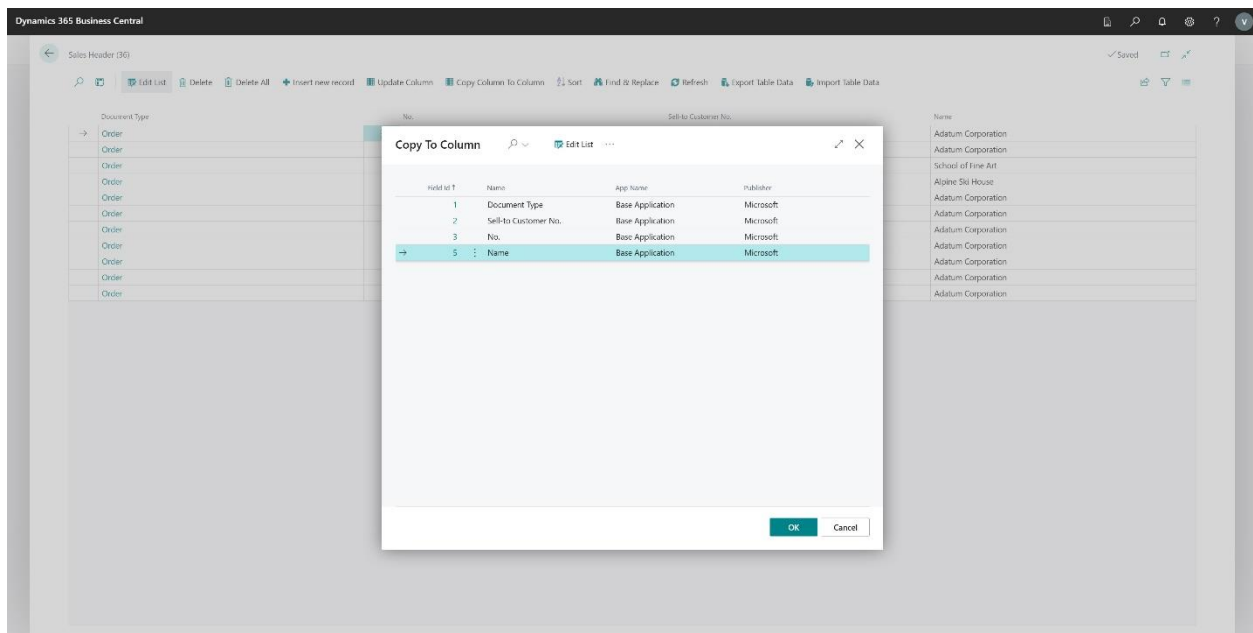


Steps for Bulk Update:

1. Apply filters to select target records
2. Click "Update Column"
3. Select the field to update
4. Enter the new value
5. Confirm to apply to all filtered records

Copy Column to Column

Copy data from one column to another for all records.



How to Copy Columns:

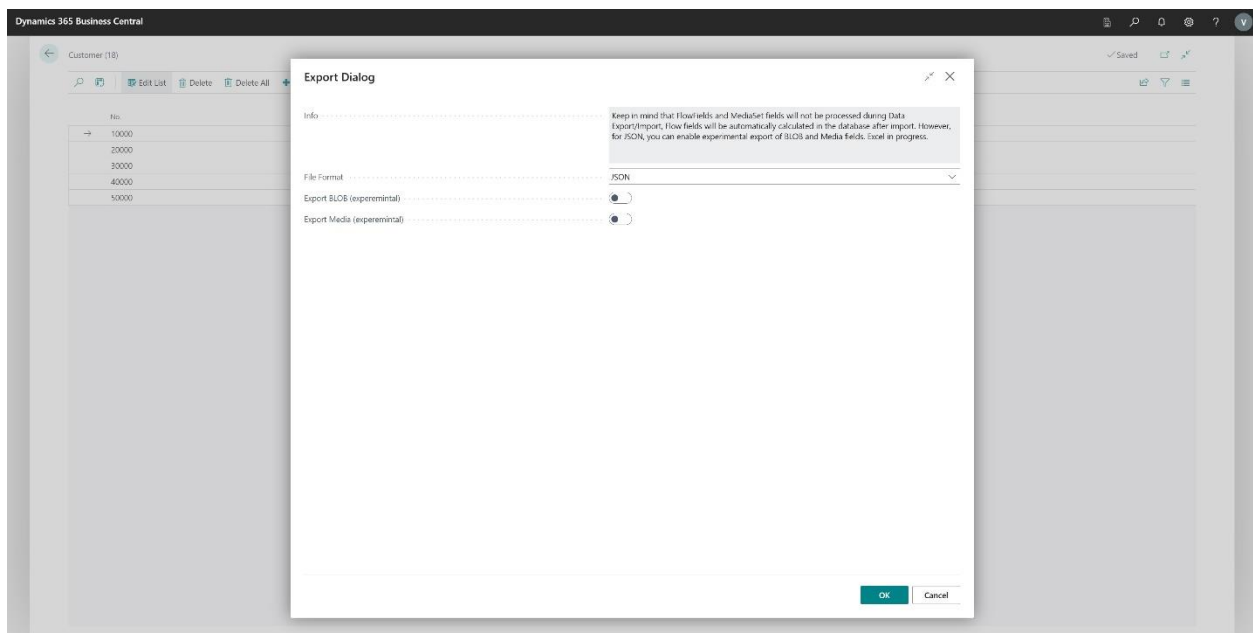
1. Click "Copy Column to Column"
2. Select source column
3. Select destination column
4. Confirm the operation

Note: Data types must be compatible for successful copying.

Data Import/Export

Export Table Data

Export data in multiple formats for external use or backup.



Export Options:

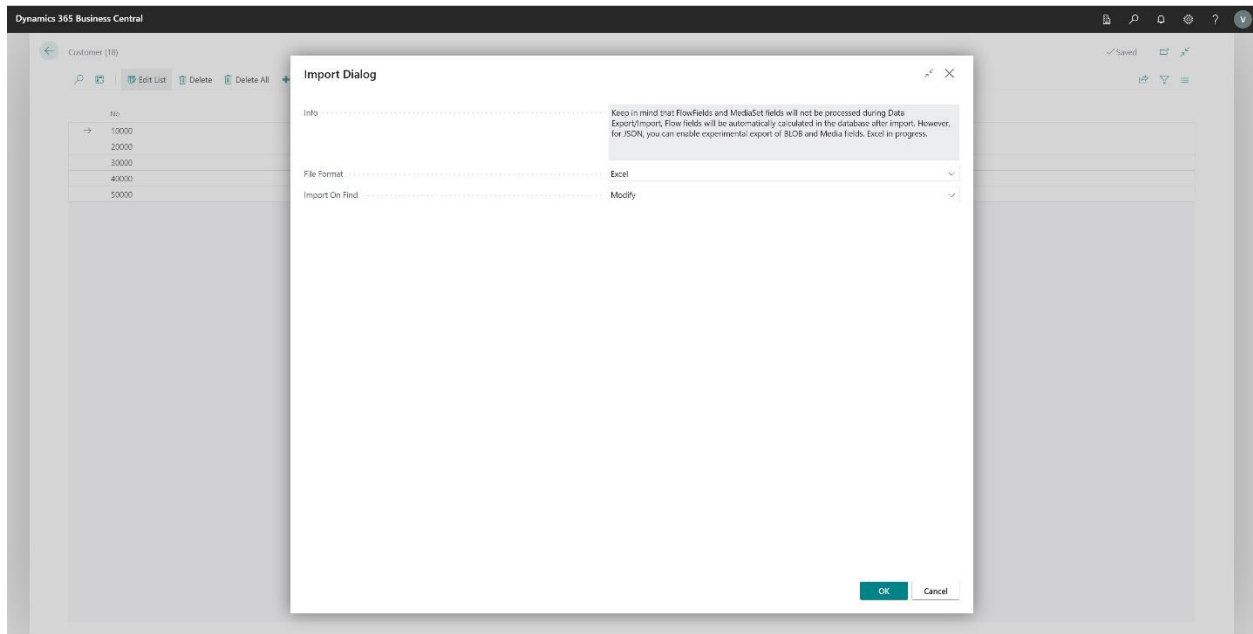
- **Excel Format:** Standard .xlsx files
- **JSON Format:** Including experimental BLOB/Media fields in Base64

Export Steps:

1. Load and filter desired data
2. Click "Export"
3. Choose format (Excel or JSON)
4. Select fields to export
5. Save the file

Import Table Data

Import previously exported data or external data files.

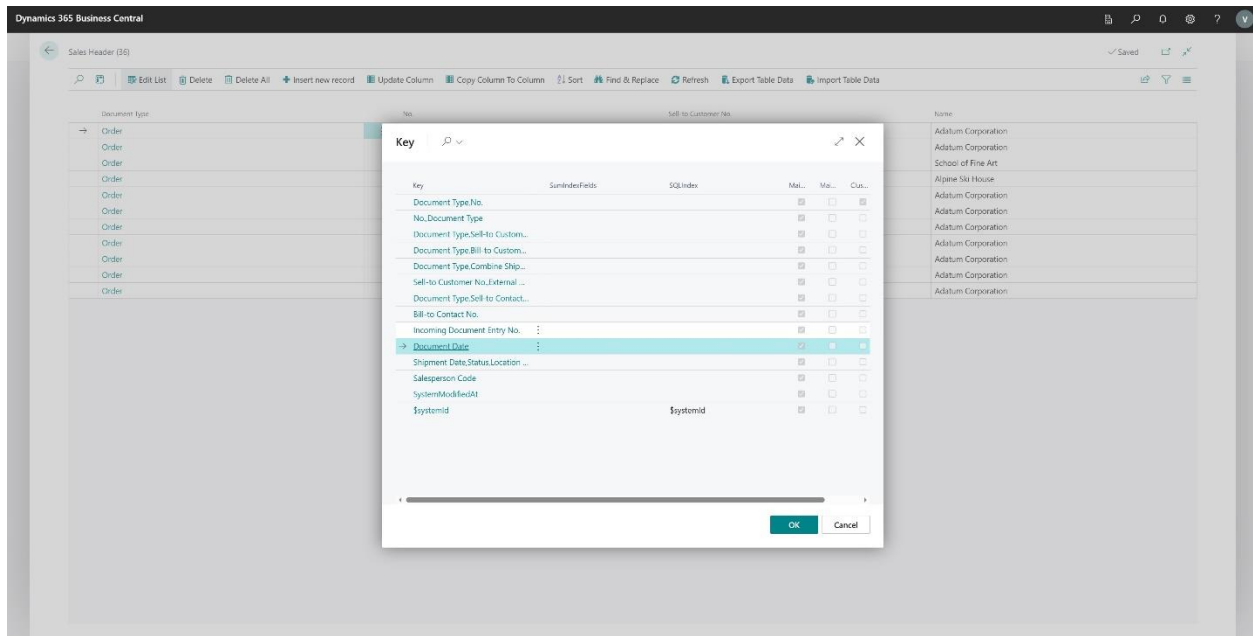


Import Process:

1. Click "Import"
2. Select file (Excel or JSON)
3. Configure "Import On Find" behavior:
 - **Error:** Stop if duplicate found
 - **Skip:** Ignore duplicates
 - **Modify:** Update existing records
4. Map fields if necessary
5. Execute import

Sorting

Sort records by any available key in the table.



How to Sort:

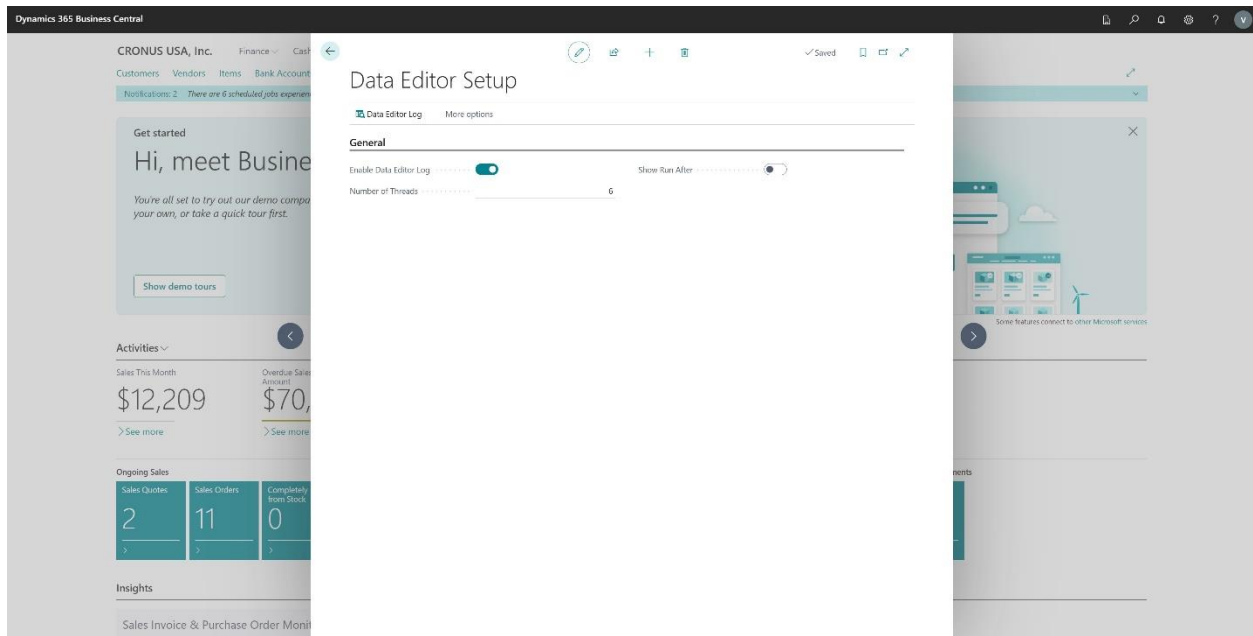
1. Click on column headers for quick sort
2. Use "Sort" button for advanced sorting
3. Select sorting key from available options
4. Choose ascending or descending order

Note: Sorting in the UI uses text fields, so numerical sorting may appear different than expected.

Configuration

Data Editor Setup

Configure global settings for the Data Editor Tool.



Available Settings:

- Enable/Disable logging
- Number of parallel threads
- "Shows Run After" function
- Default behaviors

To Access Setup:

1. Search for "Data Editor Setup"
2. Configure desired settings
3. Changes apply immediately

Logging

Data Editor Log

Comprehensive logging of all data operations for audit and tracking purposes.

Dynamics 365 Business Central

Data Editor Log

✓ Saved

Show Old Value Show New Value More options

Entry No.	Record ID	Table No.	Table Name	Field No.	Field Name	Action Type	Old Value	New Value	Web Value	Created At	Created By
2	Customer:20000	18	Customer	2	Name	Modify	Trey Research	New Name		9/15/2025 3:36 AM	VLD
1	VDV Data Editor Set...	72995579	VDV Data Editor Setup	2	Enable Data Editor Log	Modify	No	Yes		9/15/2025 3:33 AM	VLD

Log Information Includes:

- User who made changes
- Timestamp of operations
- Type of operation (Insert/Modify/Delete)
- Changed values
- Table and record information

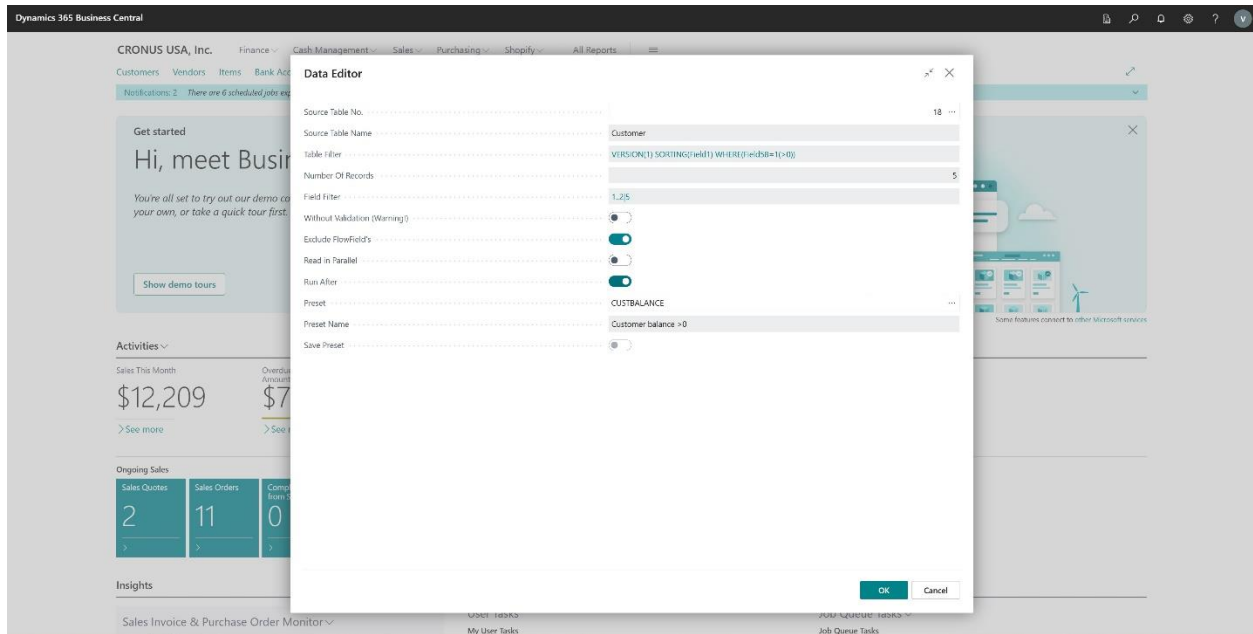
Managing Logs:

1. Enable logging in Data Editor Setup
2. View logs from "Data Editor Log" page
3. Filter logs by date, user, or operation
4. Export logs for compliance

Important: The log table itself cannot be modified using the Data Editor for security reasons.

Run After Feature

Convenient feature for editing multiple tables in sequence.

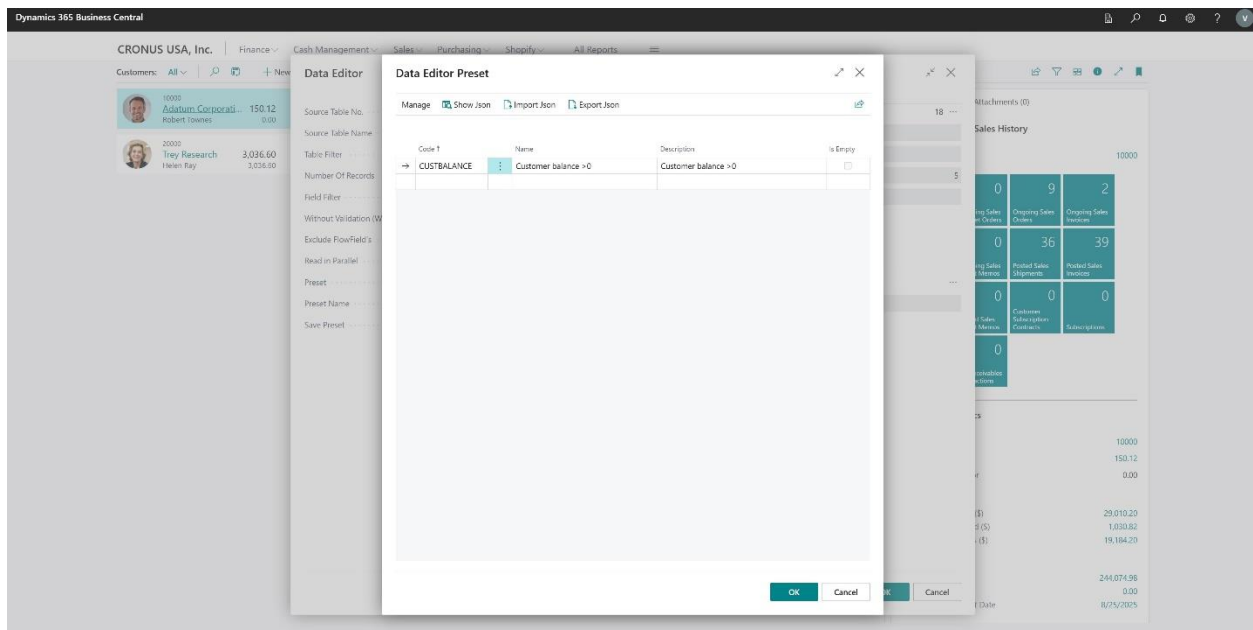


How Run After Works:

1. Enable "Shows Run After" in setup
2. The "Run After" option appears on Data Editor page
3. When enabled, closing a table automatically reopens the Data Editor
4. Useful for sequential table editing workflows

Presets

Save and load filter and table configurations for repeated use.



Creating Presets:

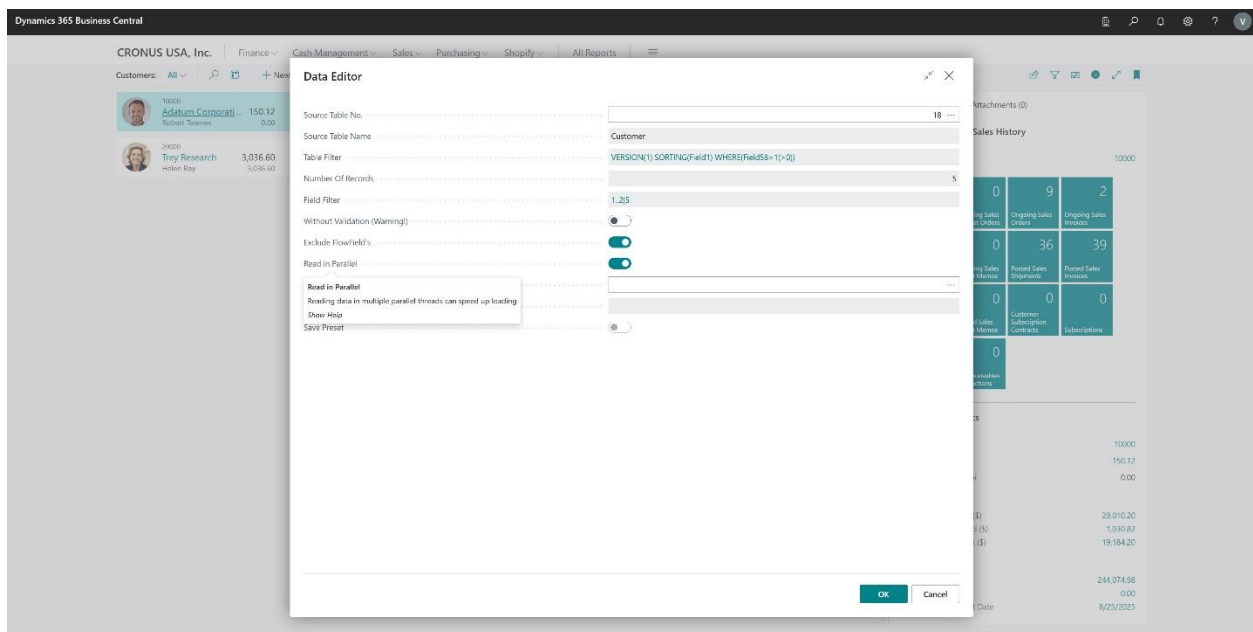
1. Configure filters and field selections
2. Click "Save as Preset"
3. Name your preset
4. Access saved presets from dropdown

Benefits:

- Unlimited number of presets
- Quick access to common configurations
- Share presets with team members

Read in Parallel

Accelerate data loading for large datasets using parallel processing.



When to Use:

- Tables with >100,000 records
- Complex FlowField calculations

Configuration:

1. Enable in Data Editor Setup
2. Set number of parallel threads
3. Monitor performance improvements

Best Practices

Performance Optimization

1. **Exclude FlowFields** when not needed
2. **Use filters** before loading large tables
3. **Enable parallel reading** for large datasets
4. **Select only necessary fields** to reduce load

Data Safety

1. **Always backup** before bulk operations
2. **Test in sandbox** environment first
3. **Enable logging** for critical changes
4. **Use validation** unless specifically needed to bypass

Efficient Workflows

1. **Create presets** for repetitive tasks
2. **Use Find & Replace** for bulk corrections
3. **Leverage Modal Edit** for complex data types
4. **Enable Run After** for multi-table operations

Common Use Cases

Data Migration

- Import data from Excel
- Bypass validation for initial load
- Use Update Column for standardization
- Export for verification

Data Cleanup

- Find & Replace for corrections
- Delete duplicate records
- Update outdated values
- Rename incorrect primary keys

Testing & Development

- Quick data setup for testing
 - Bypass business logic for edge cases
 - Export/Import test datasets
 - Direct table manipulation
-

FAQ & Troubleshooting

Frequently Asked Questions

Q: Can I undo changes made in Data Editor?

A: No, changes are committed immediately. Always backup data before making significant changes.

Q: Why can't I see certain fields?

A: Check if FlowFields are excluded or if field filters are applied.

Q: Can multiple users use Data Editor simultaneously?

A: Yes, but be cautious of conflicting changes. Use the Refresh function regularly.

Q: Is there a limit to the number of records I can load?

A: No hard limit, but performance may degrade with very large datasets (>100,000 records).

Q: Can I edit system tables?

A: Yes, but with restrictions. Some system tables are protected and cannot be modified.

Troubleshooting Common Issues

Slow Performance

- Enable "Exclude FlowFields"
- Use filters to reduce data volume
- Enable parallel reading
- Select fewer fields

Import Failures

- Verify data format matches table structure
- Check for primary key conflicts
- Ensure data types are compatible

Validation Errors

- Enable "Without Validation" if appropriate
- Check field relationships
- Verify mandatory fields are populated
- Review Business Central validation rules

Access Denied

- Verify user permissions
 - Check table permissions
 - Ensure extension is properly installed
 - Contact system administrator
-

Support & Resources

Getting Help

- **Email:** support@volodver.com
- **Phone:** +1 720-973-8440
- **Address:** 2020 N Academy Blvd, Ste 261, Colorado Springs, CO 80909, USA

Additional Resources

- [Source Code on GitHub](#)
- [Developer Blog](#)

License Information

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This functional guide is based on Data Editor Tool for Microsoft Dynamics 365 Business Central, developed by Volodymyr Dvernytskyi.