

Default Dimension Rules

Quick reference: which rule to use when, and the priority order Business Central applies on posting.

Default dimensions are how you automate tagging so users do not have to think about it. Picking the wrong rule is the difference between clean data and constant cleanup. There are four rules. Use this reference to pick the right one for each combination of master record and dimension.

The four rules

Rule	Behavior	Use it for	Avoid when
Code Mandatory	Posting is blocked if the dimension is missing. The user must enter a value before the entry can post.	Critical dimensions you cannot afford to miss. Department on expense accounts. Project on time entries. Cost center on labor.	The list of valid values is large and users will not know which to pick.
Same Code	The dimension value must match the default. Cannot be overridden on the transaction.	Fixed assignments. The IT department always codes to cost center IT. A specific GL account always uses one project.	Anyone in the business has a legitimate reason to override.
No Code	The dimension must be blank on this master record. Posting is blocked if a value is entered.	Records where the dimension genuinely does not apply. Intercompany clearing accounts. Suspense accounts.	You are using it as a workaround to hide a master data problem.
Code Optional	A value is suggested but not required. User sees the default and can change or clear it.	Soft guidance where you want consistency without enforcement. Customer segment defaults that may flex by transaction.	The dimension matters for reporting accuracy. Optional becomes blank, fast.

How to choose

Run the proposed default through this decision flow. Pick the rule that matches the scenario you are in.

If your scenario is...	Use
The dimension is critical for finance reporting and the same value applies in 100% of cases.	Same Code
The dimension is critical for finance reporting but the value varies by transaction.	Code Mandatory

If your scenario is...	Use
The dimension does not apply to this master record at all and would create bad data.	No Code
The dimension is helpful but not essential, and users have judgment on when to apply it.	Code Optional
You are not sure which to pick, and the dimension matters for reporting.	Code Mandatory

Priority order at posting

Business Central does not apply just one default. It applies whichever default is most specific, working through this priority order. When two defaults conflict, the higher-priority source wins.

#	Source of default	Notes
1	Source-specific master record (e.g., specific Customer, Item, Vendor, Project)	Most specific. If the customer card has a default and the GL account has a different default, the customer wins.
2	Account Type defaults (e.g., G/L Account default)	Second priority. Useful when you want a class of accounts to share a default.
3	Account-level defaults set on the GL account itself	Applied when no master record provides a default.
4	User input on the transaction	User entry can override defaults set as Code Optional, but cannot override Same Code or No Code.

If you set Code Mandatory at level 3 and the user does not enter a value at level 4, the post is blocked. If you set Same Code at level 1 and the user tries to enter a different value at level 4, the entry is rejected.

Common mistakes to avoid

- Setting a default that is wrong most of the time. Defaults that are wrong silently corrupt your data faster than no default at all. Better to require entry than default the wrong value.
- Using Code Optional for dimensions that matter. Optional becomes blank. If the dimension is on a report, make it Code Mandatory or Same Code.
- Setting Code Mandatory on every account before testing. Test in a sandbox. Code Mandatory will block posts your team did not expect.
- Forgetting No Code on intercompany or suspense accounts. Without No Code, users will tag dimensions on these and your reports will look strange.
- Letting the values list grow unchecked. A Department dimension with 47 values is not a default problem, it is a master data problem.