



45 tips in 45 minutes

Business Central



Tip # 1

#1: Use Background Posting to boost productivity

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the logo, "Dynamics 365 Business Central", and the environment "Environment: US". The main content area is titled "General Ledger Setup" and contains several sections: "Dimensions", "Background Posting", and "Reporting".

The "Background Posting" section is highlighted with a blue border and contains the following settings:

- Post with Job Queue:
- Post & Print with Job Queue:
- Job Queue Category: JRNLPST
- Notify On Success:
- Report Output Type: PDF

The "Reporting" section below it includes:

- Financial Report for Balance Sheet: M-BALANCE
- Financial Report for Retained Earnings: M-RETAINED
- Financial Report for Income Statement: M-INCOME
- Additional Reporting: (empty dropdown)

#1: Use Background Posting to boost productivity

The screenshot displays the Dynamics 365 Business Central user interface. At the top, the header bar shows the application name "Dynamics 365 Business Central" and the environment "Environment: US". Below the header, the navigation pane includes "CRONUS USA, Inc." and various functional areas such as Finance, Cash Management, Sales, Purchasing, and Shopify. A secondary navigation bar lists "Customers", "Vendors", "Items", "Bank Accounts", "Chart of Accounts", "General Ledger Setup", "Sales & Receivables Setup", and "More".

The main content area features a "Report Inbox" section with a table listing reports. The table has columns for "Description", "Created Date-Time", and "Output Type". One row is highlighted with a blue border, indicating it is selected. This row contains the text "PDF", a vertical ellipsis icon, the date and time "5/24/2023 11:30 ...", and the output type "PDF".

Description	Created Date-Time ↓	Output Type
<u>PDF</u>	⋮ 5/24/2023 11:30 ...	PDF



Tip # 2

#2: Get notified about Job Queue failures

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes the company name 'Contoso Electronics', the product name 'Dynamics 365 Business Central', and the environment 'V25 DK Environment: Denmark'. The main content area is titled 'Assisted Setup' and contains a list of setup tasks. The task 'Set up Job Queue Notifications' is highlighted in blue. The background shows a sidebar with 'Get started' information and a sales summary for 'Sales This Month' showing 'kr10,590'.

Title	Completed	Learn more	Description
Connect your files to the cloud	<input checked="" type="checkbox"/>	Read	Configure which features can work with O...
Do more with Business Central			
<u>Set up Job Queue Notifications</u>	<input type="checkbox"/>	Read	Set up Job Queue Notifications to receive ...
Excel Add-in Centralized Deployment	<input type="checkbox"/>	Read	Deploy the Excel add-in for specific users, ...
Configure the Cash Flow Forecast chart	<input type="checkbox"/>	Read	Specify the accounts to use for the Cash Fl...
Outlook Add-in Centralized Deployment	<input type="checkbox"/>	Read	Deploy Outlook add-in for specific users, g...
Teams App Centralized Deployment	<input type="checkbox"/>	Read	Deploy the Business Central app for Teams...
Power Automate Environment	<input type="checkbox"/>	Read	Override the default setting and choose a ...
Access data with Microsoft 365 licenses	<input type="checkbox"/>	Read	Unlock data across your organization by s...
Card Settings	<input type="checkbox"/>	Read	Configure security settings that determine ...
Set Up Time Sheets	<input type="checkbox"/>	Read	Track the time used on projects, register a...
Set up approval workflows			
Konfigurer maillogføring vha. funktionen M...	<input type="checkbox"/>	Read	Spor mailudvekslinger mellem dit salgstea...
Set up approval workflows	<input type="checkbox"/>	Read	Create approval workflows that automatic...
Set up an approval workflow to manage inv...	<input type="checkbox"/>	Read	Create approval workflows that automatic...
Set up a customer approval workflow	<input type="checkbox"/>	Read	Create approval workflows that automatic...
Set up an approval workflow to manage pa...	<input type="checkbox"/>	Read	Create approval workflows that automatic...
Set Up Extended Security			
Set up field monitoring	<input type="checkbox"/>	Read	You can monitor important fields when co...

#2: Get notified about Job Queue failures

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics' in the 'Environment: Denmark' region. The user is in the 'Assisted Setup' section, specifically on the 'Start Setup' page. A dialog box titled 'Set Up Job Queue notifications' is open, displaying the following content:

Set Up Job Queue notifications



Welcome to Job Queue notifications
Get notified about background tasks that Business Central executes with Job Queues.

Let's go!
Choose Next to specify who to notify about issues with job queue entries that run in the background.

At the bottom of the dialog, there are three buttons: 'Back', 'Next' (highlighted in teal), and 'Finish'.

The background interface shows a list of setup tasks under the 'Do more with' section, including 'Set up Job Queue notifications', 'Excel Add-in', 'Configure the Cash Flow', 'Outlook Add-in', 'Teams App Connector', 'Power Automate', 'Access data via Power BI', 'Card Settings', 'Set Up Time', 'Set up approval workflows', and 'Set Up Extended Security'.

#2: Get notified about Job Queue failures

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics' in the 'Environment: Denmark' region. The main window displays the 'Assisted Setup' screen with a sidebar menu. A modal dialog titled 'Set Up Job Queue notifications' is open in the foreground. The dialog contains the following elements:

- Who should know about issues with job queue entries?**
 - Notify the user who initiates b...
 - Notify these job queue notific...
- Choose one or more job queue notification administrators to notify about issues.
- Job Queue Notification Administrators List
- A table with the following structure:

User Name ↑	
→	ADMIN
- Navigation buttons: Back, Next, Finish.

#2: Get notified about Job Queue failures

The screenshot shows the Dynamics 365 Business Central interface for Contoso Electronics. The main window displays the 'Assisted Setup' page with a list of tasks. A modal dialog box titled 'Set Up Job Queue notifications' is open in the foreground. The dialog box contains a gear icon, the text 'How do you want to notify users?', and two toggle switches: 'In-product notifications' (which is turned on) and 'Control notifications with busin...' (also turned on). Below the toggles, there is a text prompt: 'Choose Next to specify when to show in-product notifications.' At the bottom of the dialog, there are three buttons: 'Back', 'Next' (highlighted in teal), and 'Finish'.

Set Up Job Queue notifications

How do you want to notify users?

In-product notifications

Control notifications with busin...

Choose Next to specify when to show in-product notifications.

Back Next Finish

#2: Get notified about Job Queue failures

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics' in the 'V25 DK' environment. The user is in the 'Assisted Setup' section, specifically on the 'Set Up Job Queue notifications' step. A modal dialog box is open, titled 'Set Up Job Queue notifications', which contains the following configuration options:

- When do you want to display in-product notifications?**
 - Immediately for each job queue...
 - After a threshold is reached
- Low threshold**: 3
- High threshold**: 5

A note is displayed: **NOTE: Job queue entries have issues when they fail more times than their Maximum number of attempts to run setting allows.** Below the note, it says: 'Choose Next to finish the in-product notifications setup.'

At the bottom of the dialog, there are three buttons: 'Back', 'Next' (highlighted in green), and 'Finish'.

The background interface shows a list of setup tasks under 'Do more with' and 'Set up approval workflows'. The 'Set up Job Queue notifications' task is currently selected and highlighted in teal.

#2: Get notified about Job Queue failures

The screenshot displays the Dynamics 365 Business Central interface for 'Contoso Electronics' in the 'Environment: Denmark' region. The main window shows the 'Assisted Setup' page with a list of tasks. A modal dialog box titled 'Set Up Job Queue notifications' is open, indicating that the setup is complete. The dialog includes a green checkmark, a confirmation message, and instructions on how to enable notifications using Power Automate. At the bottom of the dialog are 'Back', 'Next', and 'Finish' buttons.

Set Up Job Queue notifications

✓

The Job Queue notification setup is complete.

To enable notifications using Power Automate:

[Create an automated flow from Job Queue Notification template.](#)

Choose Finish to apply the setup and complete the guide.

Back **Next** **Finish**

#2: Get notified about Job Queue failures

Contoso Electronics

Dynamics 365 Business Central

CRONUS Danmark A/S

Finance

Cash Management

Sales

Purchasing

Shopify

All Reports

Customers

Vendors

Items

Bank Accounts

Chart of Accounts

✕ The Job "Post Sales Invoice 102228." scheduled by ADMIN experienced an issue. [Restart failed job](#) | [Show more details](#) | [Don't show again](#)

Insight from last week

The best-selling item was
BERLIN Gæstestol, gul with
400 units sold

Actions

+ Sales Quote

+ Purchase Quote

+ Sales Order

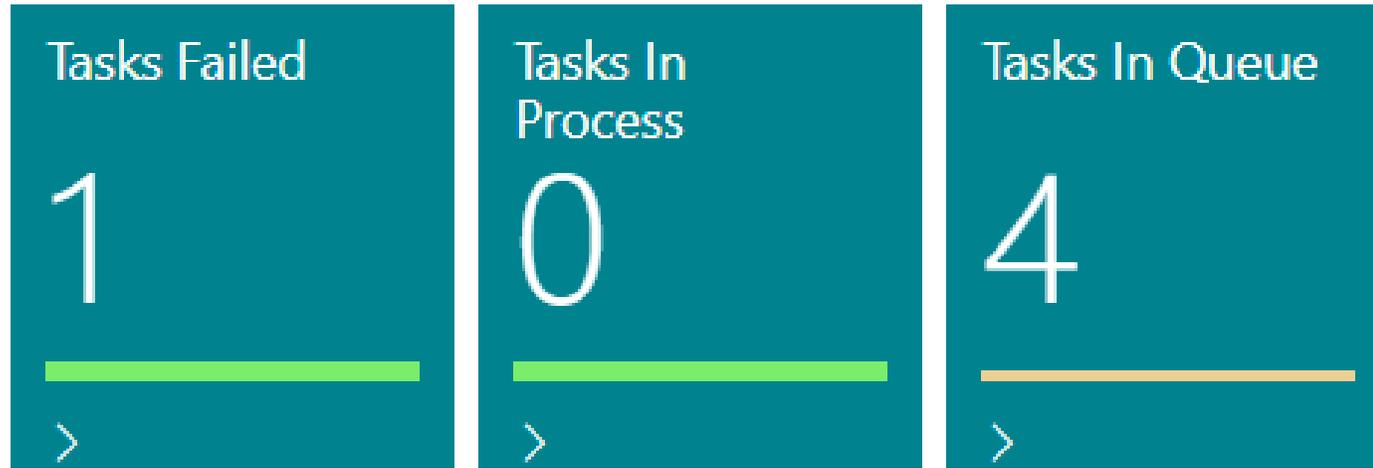
+ Purchase Order

+ Sales Invoice

+ Purchase Invoice

#2: Get notified about Job Queue failures

Job Queue Tasks



Regular users see their own job queues

Job Queue Notification Administrators see all



Tip # 3

#3: Easily connect your Shopify store to Business Central

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Dynamics 365 Business Central" and "Environment: Production". The main content area is titled "Assisted Setup" and lists various setup tasks. A modal dialog titled "Shopify Connector Setup" is open in the center, indicating successful completion. The dialog contains a green checkmark, the text "You're all set! We've already started importing products from your shop in Shopify.", and instructions to review shop settings. At the bottom of the dialog are "Back", "Next", and "Finish" buttons. The background interface shows a sidebar with "Get started" and "Hi, me" sections, and a main area with a list of setup tasks including "Migrate busi...", "Set up AMC...", "Set up Cloud...", "Set up a ban...", "Invite your e...", "Connect with...", "Do more with...", "Excel Add-in...", "Configure th...", "Outlook Add...", "Teams App Centralized Deployment", and "Power Automate Environment".

Shopify Connector Setup

✓

You're all set!
We've already started importing products from your shop in Shopify.

Review your shop settings to ensure that data synchronize correctly.

[Open shop settings](#)

Back **Next** **Finish**



Tip # 4

#4: Troubleshoot Shopify integration – run in the foreground

The screenshot shows the Dynamics 365 Business Central interface for a 'Shopify Shop Card'. The page title is 'Shopify Shop Card' and it is under the 'Synchronization' tab. A blue box highlights a grid of synchronization options: Sync Products, Sync Posted Sales Invoices, Sync Inventory, Sync Disputes, Sync Orders, Sync Product Images, Sync Customers, Sync All, Sync Shipments, Sync Prices, and Sync Payouts. Below this, the 'General' section contains fields for Code (MYSHOP), Shopify URL (https://cronus.myshopify.com), and a toggle for 'Enabled' which is currently turned on. Other settings include Logging Mode (Error Only), Allow Background Sync (disabled), Allow Data Sync to S... (enabled), and various API version and update options. The 'Item/Product Synchronization' section at the bottom includes settings for Sync Item, Auto Create Unknown..., Shopify Can Update I..., Can Update Shopify..., Item Template Code, Sync Item Attributes, Variant Prefix, SKU Mapping, SKU Field Separator, and Inventory Tracked.

Contoso Electronics Dynamics 365 Business Central Environment: v25US

CRONUS USA, Inc
Shops: All
Code ↑
MYSHOP

Shopify Shop Card

Related Synchronization | More options

- Sync Products
- Sync Posted Sales Invoices
- Sync Inventory
- Sync Disputes
- Sync Orders
- Sync Product Images
- Sync Customers
- Sync All
- Sync Shipments
- Sync Prices
- Sync Payouts

General

Code: MYSHOP
Shopify URL: https://cronus.myshopify.com
Enabled:
Has AccessKey:
Currency Code:
Language Code:
Logging Mode: Error Only
Allow Background Sync:
Allow Data Sync to S...:
Shopify Admin API Ve...:
Update API Version B...:
Show less

Item/Product Synchronization

Sync Item:
Auto Create Unknown...:
Shopify Can Update I...:
Can Update Shopify ...:
Item Template Code:
Sync Item Attributes:
Variant Prefix: V_
SKU Mapping:
SKU Field Separator: |
Inventory Tracked:
Show more



Tip # 5

#5: Use a company badge to help identify the company

Central  Environment: USA     

Posted Documents ▾ Shopify ▾ | All Reports | ☰

Sales Journals Cash Receipt Journals Transfer Orders Job Queue Entries ↗

Actions

- + Sales Quote + Sales Return Order > Sales
- + Sales Invoice + Sales Credit Memo > Reports
- + Sales Order > Tasks > History

Sales Orders Released Not Shipped



#5: Use a company badge to help identify the company

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main content area is titled 'Company Information' and contains several sections: 'Communication', 'Payments', 'Shipping', 'Tax', 'Company Badge', and 'User Experience'. The 'Company Badge' section is highlighted with a blue border and contains the following fields:

Field	Value
Company Badge	Custom
Company Badge Text	NYC
Company Badge Style	Orange

The left sidebar shows navigation options for 'Contoso', 'Sales Orders', 'Items', 'Headline', 'Activities', 'For Release', 'Intercompany', and 'Incoming Transactions'. The top navigation bar includes the 'Contoso Electronics' logo, 'Dynamics 365 Business Central' text, and user profile information for 'NYC Environment: USA'.

#5: Use a company badge to help identify the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "electronics" and "Dynamics 365 Business Central" on the left, and "Environment: USA" with a user profile icon on the right. A navigation bar below the header includes "Sales", "Purchasing", "Inventory", "Posted Documents", and "Shopify". A main content area shows a list of sales orders with a table header including "Month" and "Actions". The actions column contains "+ Sales Quote", "+ Sales Invoice", and "+ Sales Order". A large text overlay reads "Largest posted invoice was for 1000000".

An "Available Companies" dropdown menu is open on the right side of the screen. It features a search input field at the top. The list of companies is organized by region:

- USA** (indicated by an upward arrow):
 - Contoso Consolidation (with a "CON SOL" badge)
 - Contoso** (with an "NYC" badge and a checkmark)
- Denmark** (indicated by an upward arrow):
 - Contoso Denmark (with a "CPH" badge)
- Germany** (indicated by an upward arrow):
 - Contoso Germany (with a "HAM" badge)
- Preview** (indicated by an upward arrow):
 - Contoso (preview) (with a "TST" badge)

At the bottom of the interface, a "Sales Orders Released Not Shipped" dashboard shows five metrics:

- Sales Orders - Open: 4
- Completely Re... from Stock: 0
- Ready To Ship: 0
- Partially Shipped: 0
- Delivered: 0



Tip # 6

#6: Save database cost. Use Retention Policies to automatically clean up data

The screenshot displays the Dynamics 365 Business Central interface for configuring a Retention Policy. The main heading is "Job Queue Log Entry · 1 WEEK". The "General" section shows "Table Id" as 474 and "Table Caption" as Job Queue Log Entry. The "Retention Policy" section shows "Retention Period" set to 1 WEEK, "Enabled" as a toggle switch, and "Apply to all records" as a toggle switch. A blue box highlights the "Apply to all records" toggle, and an arrow points from a callout box below to this toggle.

Apply to all records

Deselect if you want to define rules for the clean-up (i.e. only delete logs of successful runs)

#6: Save database cost. Use Retention Policies to automatically clean up data

The screenshot displays the Dynamics 365 Business Central interface for configuring a retention policy for the 'Job Queue Log Entry' table. The 'Apply to all records' toggle is highlighted with a blue box. Below, a table shows retention rules for 'Status: Success' (2 DAYS) and 'Status: Error' (1 WEEK), with the first two columns highlighted in blue.

Table Filter Text	Retention Period	Keep Last Document Version	Enabled	Locked
→ Status: Success	2 DAYS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Status: Error	1 WEEK	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

#6: Save database cost. Get company & table size from Data Administration

The screenshot displays the 'Data Administration' page in Microsoft Dynamics 365 Business Central. The page is titled 'Data Administration' and includes a 'Data Administration Guide' link, a 'Refresh' button, and dropdown menus for 'Actions', 'Related', and 'Fewer options'. The main content area is divided into two sections: 'Table Size' and 'Company Size'.

Table Size

Table Name	Company Name	No. of Records	Data Size (KB) ↓	Last Period Size (30D)	Growth % (30D)
Config. Media Buffer	CRONUS USA, Inc.	67	2616	0	0.00
Data Sensitivity	(Cross-Company Data)	29920	1576	0	0.00
Calendar Entry	CRONUS USA, Inc.	14040	1056	0	0.00
Intelligent Cloud Stat...	(Cross-Company Data)	2825	608	608	0.00
Config. Package Field	CRONUS USA, Inc.	4812	560	0	0.00
G/L Entry	CRONUS USA, Inc.	4248	512	0	0.00
Config. Package Field	My Company	3059	360	0	0.00

Company Size

Company Name	Size (KB) ↓
CRONUS USA, Inc.	32200
(Cross-Company Data)	15496
My Company	7968
Total (KB)	55664

The interface also shows a sidebar with 'CRONUS USA, Inc.' and 'Customers Vendors' links, a 'Get started' section with 'Hi, me' and 'You're all set to t your own, or tak', and an 'Activities' section showing 'Sales This Month' as '\$11,914' with a '> See more' link. The top right corner indicates the environment is 'Production'.



Tip # 7

Setup tip # 1: Enable OneDrive integration for smooth collaboration

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Dynamics 365 Business Central" and "Environment: Production". The main content area is titled "Assisted Setup" and lists various setup tasks. A modal dialog box titled "OneDrive Setup" is open in the center, indicating a successful configuration. The dialog contains a green checkmark, the text "Success! All companies in this Business Central environment are now set up to use OneDrive. Business Central users will be able to share files depending on your organization's Microsoft 365 sharing policies.", and two buttons: "Help me configure policy" and "Done".

OneDrive Setup

✓

Success!
All companies in this Business Central environment are now set up to use OneDrive. Business Central users will be able to share files depending on your organization's Microsoft 365 sharing policies.

[Help me configure policy](#) **Done**

#1: Enable OneDrive integration for smooth collaboration

The screenshot displays the OneDrive web interface. At the top, there is a search bar and navigation icons. Below the search bar, a breadcrumb path is highlighted with a blue box: "My files > Business Central > CRONUS USA, Inc".

Below the breadcrumb, a table lists files. The first row is highlighted with a blue box, showing a file named "1306 Sales - Invoice PS-INV103197.pdf". The "Sharing" column for this file is "Shared", and the "Activity" column shows "You shared with Alan Steiner · 4m ago".

Name	Modified	Modified By	File size	Sharing	Activity
1306 Sales - Invoice PS-INV103197.pdf	About a minute ago	Søren Alexandersen	43.0 KB	Shared	You shared with Alan Steiner · 4m ago
Customer Card.xlsx	A few seconds ago	Søren Alexandersen	23.4 KB	Private	

The left sidebar shows the user's profile "Søren Alexandersen" and navigation options: Home, My files, Shared, Favorites, and Recycle bin. Below this, there are sections for "Browse files by" (People, Meetings) and "Quick access".



Tip # 8

#8: Deploy the Excel add-in so you can work with any list data in Excel

The screenshot shows the Microsoft Dynamics 365 Business Central interface. The top navigation bar includes the text 'Dynamics 365 Business Central' on the left and 'Environment: Production' with search, notification, and settings icons on the right. The main content area is titled 'Assisted Setup' and contains a list of setup tasks. The task 'Excel Add-in Centralized Deployment' is highlighted in light blue and has a checked checkbox in the 'Completed' column. Other tasks include 'Get started with Shopify', 'Set up a connection to Dataverse', 'Connect your files to the cloud', 'Do more with Business Central', 'Configure the Cash Flow Forecast chart', 'Outlook Add-in Centralized Deployment', 'Teams App Centralized Deployment', 'Power Automate Environment', 'Access data with Microsoft 365 licenses', 'Set up the Image Analyzer', 'Card Settings', 'Set Up Time Sheets', 'Set up approval workflows', 'Set up the Email Logging Using the Micros...', and 'Set up approval workflows'.

Title	Completed	Learn more	Description
Get started with Shopify	<input type="checkbox"/>	—	Easily set basic connection and synchroniz...
Set up a connection to Dataverse	<input type="checkbox"/>	Read	Connect to Dataverse for better insights a...
Connect your files to the cloud	<input checked="" type="checkbox"/>	Read	Configure which features can work with O...
Do more with Business Central	<input type="checkbox"/>	—	
<u>Excel Add-in Centralized Deployment</u>	<input checked="" type="checkbox"/>	Read	Deploy the Excel add-in for specific users, ...
Configure the Cash Flow Forecast chart	<input type="checkbox"/>	Read	Specify the accounts to use for the Cash Fl...
Outlook Add-in Centralized Deployment	<input type="checkbox"/>	Read	Deploy Outlook add-in for specific users, g...
Teams App Centralized Deployment	<input type="checkbox"/>	Read	Deploy the Business Central app for Teams...
Power Automate Environment	<input type="checkbox"/>	Read	Override the default setting and choose a ...
Access data with Microsoft 365 licenses	<input type="checkbox"/>	Read	Unlock data across your organization by s...
Set up the Image Analyzer	<input type="checkbox"/>	—	The Image Analyzer extension uses powerf...
Card Settings	<input type="checkbox"/>	Read	Configure security settings that determine ...
Set Up Time Sheets	<input type="checkbox"/>	Read	Track the time used on jobs, register absen...
Set up approval workflows	<input type="checkbox"/>	—	
Set up the Email Logging Using the Micros...	<input type="checkbox"/>	Read	Track email exchanges between your sales ...
Set up approval workflows	<input type="checkbox"/>	Read	Create approval workflows that automatic...

#8: Deploy the Excel add-in so you can work with any list data in Excel

The screenshot shows the Dynamics 365 Business Central interface during an 'Assisted Setup' process. A modal dialog titled 'Excel Add-in Centralized Deployment' is open, providing instructions for configuring Microsoft 365 settings. The dialog includes a gear icon, a title, a sub-header 'Configure Microsoft 365', and a list of three numbered steps. At the bottom, there are 'Back' and 'Next' buttons. The background shows the 'Assisted Setup' page with a list of tasks, including 'Excel Add-in' which is currently selected.

Environment: Production

My Company | Assisted Setup

Customers: All

Search Start Setup General Videos

Excel Add-in Centralized Deployment

Configure Microsoft 365
Let's start by configuring app settings in Microsoft 365. You must be part of the Office apps admin role or Global admin role to do this.

1. In the Microsoft 365 admin center, go to [Integrated Apps](#).
2. Choose 'Get apps', then search for and add 'Microsoft Dynamics Office Add-in'.
3. Follow the deployment instructions and choose who has access to the add-in.

All done?
After the add-in has been deployed, choose Next to configure Business Central.

Back Next

Title	Progress	Read	Description
Get started with Business Central			
Set up a connection to your data source			
Connect your data to Business Central			
Do more with Business Central			
Excel Add-in			
Configure the Excel Add-in			
Outlook Add-in			
Teams App Connector			
Power Automate			
Access data from external systems			
Set up the Invoicing Add-in			
Card Settings			
Set Up Time and Billing			
Set up approval workflows			
Set up the Email Logging Using the Microsoft Dynamics 365 Add-in	<input type="checkbox"/>	Read	Track email exchanges between your sales team and your customers.
Set up approval workflows	<input type="checkbox"/>	Read	Create approval workflows that automatically route requests to the appropriate person.

#8: Deploy the Excel add-in so you can work with any list data in Excel

Microsoft 365 admin center

Home > Integrated apps

Integrated apps

Discover, purchase, acquire, manage, and deploy Microsoft 365 Apps developed by Microsoft partners. You can also deploy and manage Line-of-business add-ins developed within your organization. For advanced management of these apps go to the respective admin center or page : [Azure Active Directory](#) | [SharePoint](#) | [Teams](#) | [Add-ins](#)

Deployed apps Available apps Blocked apps

All apps in this list have been installed for tenant users.

Popular apps to be deployed

- Mural**
Take ideas from imagination to activation with Mural in Microsoft 365
[Get it now](#) [View details](#)
- Adobe Acrobat for Microsoft 365**
Do more with PDFs – it's Acrobat built right into popular Microsoft enterprise apps.
[Get it now](#) [View details](#)
- CodeTwo for Outlook**
Outlook Add-in: Automatic email signatures, legal disclaimers & marketing banners in...
[Get it now](#) [View details](#)
- Salesforce**
Boost productivity by bringing the Salesforce Platform to Outlook
[Get it now](#) [View details](#)

[View more apps](#)

[Get apps](#) [Upload custom apps](#) [Refresh](#) 0 items [Filter](#) [Help & support](#) [Give Feedback](#)

Name	Host products	Status	Test deployment	Last modified
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#8: Deploy the Excel add-in so you can work with any list data in Excel

The screenshot shows the Microsoft 365 Admin Center AppSource interface. At the top, there is a search bar containing the text "Microsoft Dynamics Office Add-in". Below the search bar, the search results are displayed. The first result, "Microsoft Dynamics Office Add-in" by Microsoft Corporation, is highlighted with a blue border. This add-in is compatible with Excel and Word, has a 3.2 star rating from 244 reviews, and a "Get it now" button. The other two results are "LMS365 Learning Management Solution..." by EARNINGFORCE International, which are SaaS applications with 4.4 star ratings from 96 reviews and "Get it now" buttons. On the left side of the page, there is a list of categories and industries. At the bottom, there is a blue banner with the text "Find more apps and consulting services at AppSource" and a URL: "microsoft.com/en-us/product/office/WA104379629?embedHost=admin-portal&tab=Overview".

Microsoft 365 admin center

AppSource | Microsoft 365 Apps

Apps (0) | Other apps

Microsoft Dynamics Office Add-in

Search results for "Microsoft Dynamics Office Add-in"

Showing 7 results in apps. [Clear search](#)

Sort By: Best match

Categories

- AI + Machine Learning
- Analytics
- Collaboration
- Commerce
- Compliance & Legal
- Customer Service
- Finance
- Geolocation
- Human Resources
- Internet of Things
- IT & Management Tools
- Marketing
- Operations & Supply Chain
- Productivity
- Project Management
- Sales

Industries

- Automotive

All results

Microsoft Dynamics Office Add-in
Microsoft Corporation
Excel Word
The Microsoft Dynamics Office Add-in enables data connections to Microsoft Dynamics systems.
★ 3.2 (244 ratings)
[Get it now](#)

LMS365 Learning Management Solution...
EARNINGFORCE International
SaaS
[+included add-ins](#)
Deliver, manage, and spotlight learning with the Microsoft tools people use...
★ 4.4 (96 ratings)
[Get it now](#)

LMS365 Learning Management Solution...
EARNINGFORCE International
SaaS
[+included add-ins](#)
Deliver, manage, and spotlight learning with the Microsoft tools people use...
[Get it now](#)

Find more apps and consulting services at AppSource

microsoft.com/en-us/product/office/WA104379629?embedHost=admin-portal&tab=Overview

#8: Deploy the Excel add-in so you can work with any list data in Excel

The screenshot shows the Microsoft 365 admin center interface. The main content area is titled "Deploy New App" and is divided into two sections: "Users" and "Add users".

In the "Users" section, there are two radio buttons: "Users" (which is selected) and "Deployment".

The "Add users" section is for the "Microsoft Dynamics Office Add-in". It includes a toggle switch for "Is this a test deployment?" set to "No".

Under "Assign users", there are three radio button options:

- Just me (admin@CRMbc085123.onmicrosoft.com)
- Entire organization
- Specific users/groups

The "Entire organization" option is highlighted with a blue border and a mouse cursor. Below these options is a search bar labeled "Search for users or groups to add".

At the bottom of the "Add users" section, there is an "Email notification" section with a checkbox for "Send email notification to assigned users." and a link to "View email sample".

At the bottom of the page, there are two buttons: "Next" (in blue) and "Cancel" (in grey).

#8: Deploy the Excel add-in so you can work with any list data in Excel

The screenshot shows the Microsoft 365 Admin Center interface. The top navigation bar includes the text "Microsoft 365 admin center", a search box, and icons for mail, documents, notifications, and settings. The left sidebar contains a navigation menu with categories like "Users & groups", "Resources", "Reports", "Settings", and "Apps". The main content area is titled "Deploy New App" and features a progress indicator with four steps: "Users" (checked), "Deployment" (active), "Permissions", and "Finish". The "Accept permissions requests" section contains the following information:

- App Permissions and Capabilities**
- Microsoft Dynamics Office Add-in** (with Word and Excel icons)
- App capabilities:**
 - Can read and make changes to your document
 - Can send data over the Internet
- Basic info**
- App publisher:** Microsoft Corporation
- App domain:** http://www.microsoft.com/

At the bottom of the page, there are three buttons: "Back", "Next", and "Cancel".

#8: Deploy the Excel add-in so you can work with any list data in Excel

The screenshot shows the Microsoft 365 Admin Center interface. At the top, there is a search bar and navigation icons. The main content area is titled "Deploy New App" and is divided into two columns. The left column contains a vertical progress indicator with four steps: "Users" (checked), "Deployment" (active), "Permissions" (unchecked), and "Finish" (unchecked). The right column is titled "Review and finish deployment" and contains the following sections: "Review your selected settings and deploy.", "Apps to deploy" (listing "Microsoft Dynamics Office Add-in" with Word and Excel icons), and "Assigned users" (listing "Entire organization"). At the bottom of the page, there are three buttons: "Back", "Finish deployment", and "Cancel".

Microsoft 365 admin center

Search

Deploy New App

- Users
- Deployment**
- Permissions
- Finish

Review and finish deployment

Review your selected settings and deploy.

Apps to deploy

Microsoft Dynamics Office Add-in
Word Excel

Assigned users

Entire organization

Back Finish deployment Cancel

#8: Deploy the Excel add-in so you can work with any list data in Excel

The screenshot displays the Microsoft 365 Admin Center interface. At the top, the header shows 'Microsoft 365 admin center' and a search bar. The left navigation pane is partially visible, showing categories like 'Users & groups' and 'Apps'. The main content area is titled 'Deploy New App' and features a progress bar with two steps: 'Users' and 'Deployment', both marked with green checkmarks. To the right, a large green checkmark and the text 'Deployment completed' are displayed. Below this, a table lists the deployed application: 'Microsoft Dynamics Office Add-in', which is associated with 'Word' and 'Excel' and is marked as 'Deployed'. An 'Open app' link is provided. A section titled 'Announce this to your users' contains a paragraph of text and a 'View this deployment' link. At the bottom of the deployment window, there are 'Done' and 'Cancel' buttons.

Microsoft 365 admin center

Search

Home > Integ

Deploy New App

- ✓ Users
- ✓ Deployment

✓ Deployment completed

Microsoft Dynamics Office Add-in	✓ Deployed	Open app ▾
Word Excel		

Announce this to your users

Studies show that new software is more successfully adopted when users are informed about the software and to use it. You'll soon receive an announcement email that explains to your users what you deployed and how to start using the app or solution. Forward this email to your users to improve your adoption rate 2-5x.

[View this deployment](#)

Done **Cancel**

#8: Deploy the Excel add-in so you can work with any list data in Excel

Microsoft Dynamics 365 Business Central

Environment: Production

My Company | Assisted Setup

Customers: All

Search Start Setup General Videos

Excel Add-in Centralized Deployment

Configure Business Central

Users of this environment can either receive the add-in through Centralized Deployment or through individual acquisition from the Office Store, but not both.

Enabling Centralized Deployment on this environment requires users to have their identity assigned to the add-in in Microsoft 365 as specified in the previous step to continue using the Edit in Excel feature.

Use Centralized Deployment

[Learn more about Configuring Business Central for Centralized Deployment](#)

Back Finish

Title	Read	Description
Get started with Excel Add-in		Learn about the features and synchronization options of the Excel Add-in for better insights across your organization.
Set up a connection to Excel		Configure the connection between your Excel spreadsheet and Dynamics 365 so users can work with On-premise data.
Connect your Excel spreadsheet		Link your Excel spreadsheet to the Dynamics 365 environment for specific users, groups, or roles.
Excel Add-in configuration		Configure the Excel Add-in settings, such as the data source and the use of the Cash Flow Add-in.
Configure the Excel Add-in		Set up the Excel Add-in for specific users, groups, or roles, including the central app for Teams.
Outlook Add-in configuration		Configure the Outlook Add-in settings, such as the data source and the use of the Cash Flow Add-in.
Teams App Configuration		Set up the Teams App Configuration, including the central app for Teams and the use of the Cash Flow Add-in.
Power Automate configuration		Configure the Power Automate settings, such as the data source and the use of the Cash Flow Add-in.
Access data from Excel		Learn about the features and synchronization options of the Excel Add-in for better insights across your organization.
Set up the Invoicing Add-in		Configure the Invoicing Add-in settings, such as the data source and the use of the Cash Flow Add-in.
Card Settings		Configure the Card Settings, such as the data source and the use of the Cash Flow Add-in.
Set Up Time and Billing		Configure the Time and Billing settings, such as the data source and the use of the Cash Flow Add-in.
Set up approval workflows		Configure the approval workflows that automatically create approval workflows that automatically create approval workflows...



Tip # 9

#9: Allow for over-receiving items when receiving purchases

Microsoft Dynamics 365 Business Central

Environment: Production

Item Card

1896-S · ATHENS Desk

Home | Request Approval | Item | Prices & Discounts | Actions | Related | Reports | Automate | Fewer options

Copy Item | Adjust Inventory | Create Stockkeeping Unit | Apply Template | Add to Shopify

Quantity on Hand	1,030	Net Weight	34.6
Qty. on Purch. Order	23	Gross Weight	39.79
Qty. on Sales Order	10	Unit Volume	1.2
Qty. on Job Order	0	Over-Receipt Code	OVERRCPT10
Qty. on Assembly Order	0		

Costs & Posting

Cost Details

Costing Method	FIFO
Standard Cost	780.70
Unit Cost	539.806
Net Invoiced Qty.	1,030
Cost is Adjusted	<input type="checkbox"/>
Purchase Prices & Discounts	Create New...

Posting Details

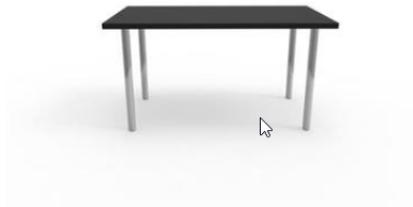
Gen. Prod. Posting Group	RETAIL
Tax Group Code	FURNITURE
Inventory Posting Group	RESALE
Default Deferral Template	

Foreign Trade

Tariff No.	
------------	--

Details | Attachments (0)

Picture



Marketing Text

Create with Copilot | Edit

Create draft based on this item's

#9: Allow for over-receiving items when receiving purchases

amics 365 Business Central

Environment: Production

Vendor Card

10000 · Fabrikam, Inc.

Home Request Approval New Document Vendor Prices & Discounts Report More options

Contact Merge With... Apply Template Send Email Pay Vendor

State GA

ZIP Code 31772

[Show on Map](#)

Contact

Primary Contact Code

Contact Krystal York

Invoicing >

Payments > CM

Receiving

Location Code ▾

Shipment Method Code ▾

Shipping Agent Code ▾

Lead Time Calculation

Base Calendar Code ▾

Customized Calendar No

Over-Receipt Code OVERRCPT20 ▾

#9: Allow for over-receiving items when receiving purchases

Microsoft Dynamics 365 Business Central

CRONUS USA, Inc

Over-Receipt Codes

Search + New Edit List Delete

Code ↑	Description	Default	Over-Receipt Tolerance %	Approval Required
OVERRCPT10	Over receipt up to 10% of quantity	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>
OVERRCPT20	Over receipt up to 20% of quantity	<input type="checkbox"/>	20	<input type="checkbox"/>
→ <u>OVERRCPT30</u>	Over receipt up to 20% of quantity	<input type="checkbox"/>	30	<input checked="" type="checkbox"/>

Amount Including Tax

0	5,792.79
0	2,230.45
0	11,584.10
0	3,880.45
0	885.80
0	1,000.00
0	2,000.00
0	1,040.00
0	9,543.18

#9: Allow for over-receiving items when receiving purchases

Amics 365 Business Central Environment: Production

Purchase Order ✓ Saved

106011 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

General Show more

Vendor Name: Fabrikam, Inc. Vendor Invoice No. *

Contact: Krystal York Vendor Shipment No.

Document Date: 4/10/2023 Status: Released

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Qty. to Receive	Qty. to Invoice
→ Item	1896-S		ATHENS Desk		10	PCS	1,500.00	11	

SUBTOTAL End. Tax (4.00%) 15,000.00 TOTAL End. Tax (4.00%) 15,000.00

#9: Allow for over-receiving items when receiving purchases

amics 365 Business Central

Environment: Production

Purchase Order 106011 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

The page has an error. Refresh (F5) to undo the change, or correct the error.

General

Vendor Name: Fabrikam, Inc. Vendor Invoice No.: 12345678
Contact: Krystal York Vendor Shipment No.:
Document Date: 4/10/2023 Status: Released

Lines

Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Qty. to Receive	Qty. to Invoice
Item	1896-S		ATHENS Desk		10	PCS	1,500.00	15	10

Validation Results
You cannot enter more than 1 in the Over-Receipt Quantity field.

#9: Allow for over-receiving items when receiving purchases

The screenshot shows the Dynamics 365 Business Central interface for Contoso Electronics. The main window displays the 'Over-Receipt Codes' configuration page. A table lists three codes with their descriptions, tolerance percentages, and approval requirements. The 'Default' checkbox for the first code (10% tolerance) is checked and highlighted with a red box.

Code ↑	Description	Default	Over-Receipt Tolerance %	Approval Required
→ <u>OVERRCPT10</u>	Over receipt up to 10% of quantity	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>
OVERRCPT20	Over receipt up to 20% of quantity	<input type="checkbox"/>	20	<input type="checkbox"/>
OVERRCPT30	Over receipt up to 30% of quantity	<input type="checkbox"/>	30	<input type="checkbox"/>

Default = "yes" means company wide.
Most restrictive setting wins.



Tip # 10

#10: Granular blocking of Item Variants

Dynamics 365 Business Central

Sales Invoice

S-INV102222 · Adatum Corporation

Home Prepare Print/Send Request Approval Invoice More options

Post Release

General

Customer Name: Adatum Corporation Due Date: 10/05/2023

Contact: Robert Townes Status: Open

Posting Date: 10/04/2023

Lines Manage Line

Select items... New Line Delete Line

Type	No.	Item Reference No.	Code	Description	Unit of Measure Code
Item	1000		BLACK	Black color	PCS
			GREEN	Green color	
			YELLOW	Yellow color	

1000 · Espresso Master

Item Variants

Code	Description	Blocked	Sales Blocked	Purchasing Blocked
BLACK	Black color	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
GREEN	Green color	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
RED	Red color	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
WHITE	White color	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
YELLOW	Yellow color	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Won't block posting of *already entered variants*



Tip # 11

#11: Use responsibilities to segregate activities, data and locations

365 Business Central Environment: Production

ISA, Inc. < Finance Cash Management Sales P >

All Search + New Delete Home ...

Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned U ID
10000	Adatum Corporation		WEST	

Users with Responsibility Center = West

Dynamics 365 Business Central Environment: Production

CRONUS USA, Inc. < Finance Cash Management Sales P >

Sales Orders: All Search + New Delete Home ...

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location C
S-ORD1010...	10000	Adatum Corporation		
S-ORD1010...	10000	Adatum Corporation		
S-ORD1010...	30000	School of Fine Art		
S-ORD1010...	40000	Alpine Ski House		
S-ORD1010...	10000	Adatum Corporation	Y-3	YELLOW
S-ORD1010...	10000	Adatum Corporation	Y-4	YELLOW
S-ORD1010...	10000	Adatum Corporation	Y-5	YELLOW
S-ORD1010...	10000	Adatum Corporation	W-1	WHITE
S-ORD1010...	10000	Adatum Corporation		WEST

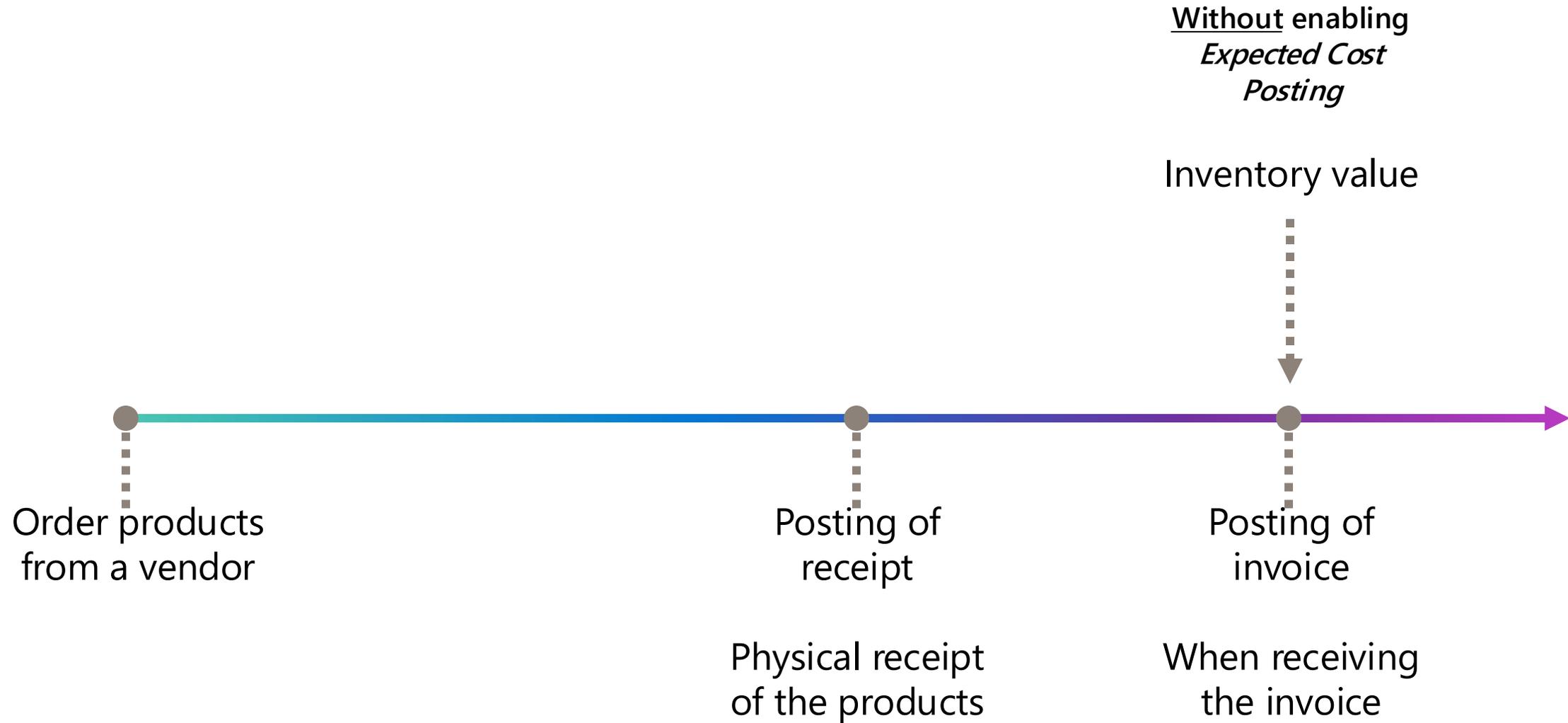
Users with no Responsibility Center



Tip # 12

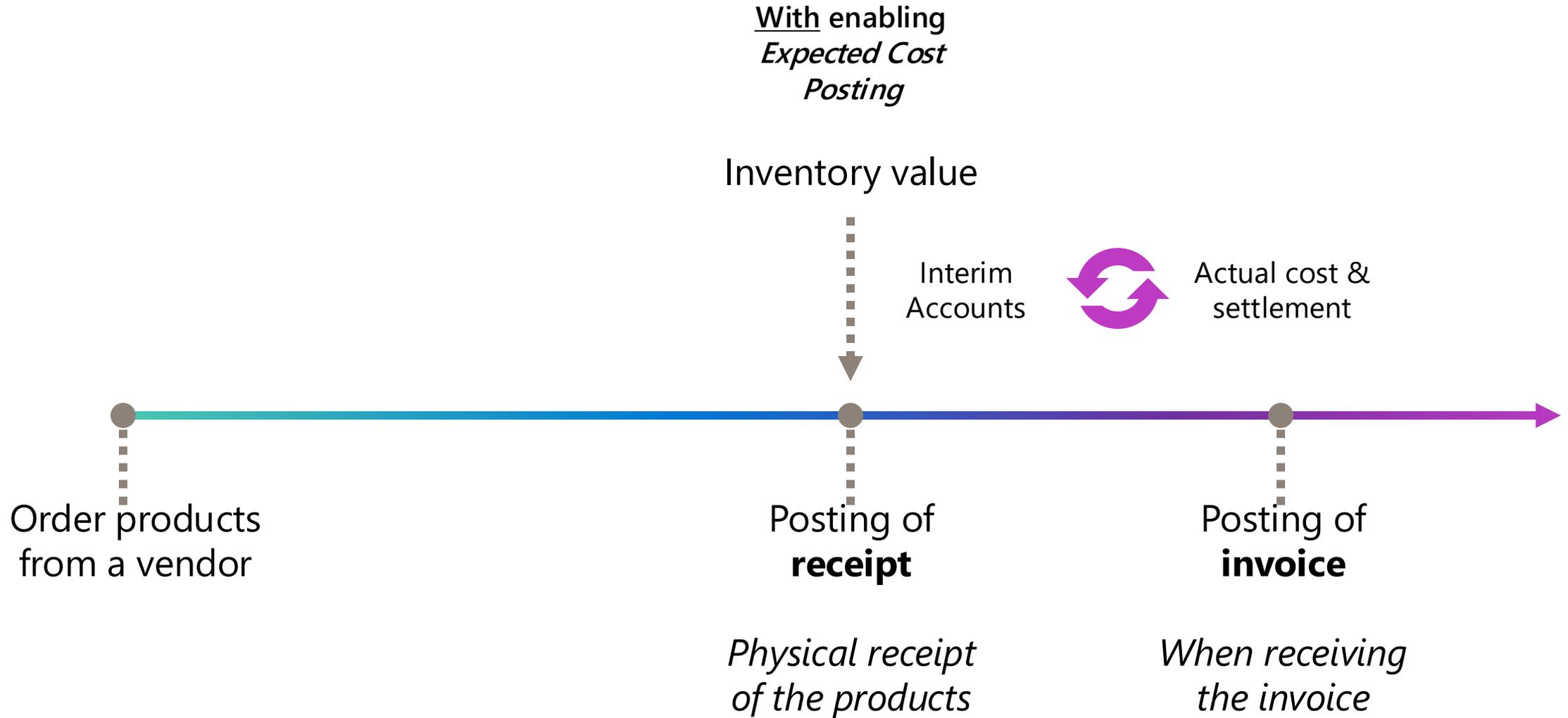
#12: Need inventory value in near-real-time?

Get closer to real-time with *expected cost*



#12: Need inventory value in near-real-time?

Get closer to real-time with *expected cost*



#12: Need inventory value in near-real-time?

Before you enable it, read the docs! Design Details: Expected Cost Posting

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main page is titled 'Inventory Setup' and has tabs for 'General', 'Posting', 'Journal Templates', and 'More options'. The 'General' tab is active, showing various settings like 'Automatic Cost Posting' (checked), 'Expected Cost Posting...', 'Automatic Cost Adjus...', 'Default Costing Meth...', 'Average Cost Calc. Type', 'Average Cost Period' (set to 'Day'), 'Copy Item Descr. to E...', 'Copy Comments Ord...' (checked), 'Allow Inventory Adjus...' (checked), and 'Location Mandatory' (unchecked). A dialog box is overlaid on the page, containing a question mark icon and the text: 'If you enable the Expected Cost Posting to G/L, the program must update table Post Value Entry to G/L. This can take several hours. Do you really want to change the Expected Cost Posting to G/L?'. The dialog has 'Yes' and 'No' buttons. A dashed arrow points from the dialog box up towards the title of the slide.



Tip # 13

#13: Substitute posting groups on-the-fly

The screenshot shows the 'Sales & Receivables Setup' page in Dynamics 365 Business Central. The page is divided into three tabs: 'Customer Groups', 'Payments', and 'More options'. The 'More options' tab is active, displaying a list of settings. The 'Allow Multiple Posting Groups' toggle is highlighted with a blue box and is currently turned on. Other settings include 'Calc. Inv. Discount', 'Tax Bus. Posting Gr. (Price)', 'Exact Cost Reversing Mandat...', 'Check Prepm. when Posting', 'Prepm. Auto Update Freque...', 'Allow Document Deletion Bef...', 'Check Multiple Posting Groups', 'Ignore Updated Addresses', 'Skip Manual Reservation', 'Quote Validity Calculation', 'Copy Line Descr. to G/L Entry', 'Document Default Line Type', and 'Disable Search by Name'. The page also features a top navigation bar with the 'Contoso Electronics' logo, 'Dynamics 365 Business Central' text, and user information for 'NYC Environment: USA'. A 'Saved' status is visible in the top right corner.

Setting	Value
Shipment on Invoice	On
Return Receipt on Credit Me...	Off
Invoice Rounding	On
Default Item Quantity	Off
Create Item from Item No.	Off
Create Item from Description	Off
Copy Customer Name to Entr...	On
Ext. Doc. No. Mandatory	Off
Appln. between Currencies	All
Logo Position on Documents	No Logo
Default Posting Date	Work Date
Default Quantity to Ship	Remainder
Auto Post Non-Inv. via Whse.	None
Copy Comments Blanket to O...	On
Calc. Inv. Discount	Off
Tax Bus. Posting Gr. (Price)	
Exact Cost Reversing Mandat...	Off
Check Prepm. when Posting	Off
Prepm. Auto Update Freque...	Never
Allow Document Deletion Bef...	
Allow Multiple Posting Groups	On
Check Multiple Posting Groups	Alternative Groups
Ignore Updated Addresses	Off
Skip Manual Reservation	Off
Quote Validity Calculation	
Copy Line Descr. to G/L Entry	Off
Document Default Line Type	Item
Disable Search by Name	Off

#13: Substitute posting groups on-the-fly

Contoso Electronics Dynamics 365 Business Central Environment: NYC USA

Customer Posting Groups ✓ Saved

Search Analyze + New Edit List Delete Edit View Related

Show All Accounts

Code ↑	Description	View All Accounts	Receivables Account	Service Charge Acc.	Payment Disc. Debit Acc.	Payment Disc. Credit Acc.
DOMESTIC	Domestic customers	<input type="checkbox"/>	15110		40910	40910
→ DOMESTICRISK	Domestic customers at risk	<input type="checkbox"/>	15115		40910	40910

#13: Substitute posting groups on-the-fly

Contoso Electronics Dynamics 365 Business Central

Environment: NYC USA

Customer Card

40000 · Alpine Ski House

Home Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate

Invoicing

Customer: [Dropdown]
Tax Registration: [Dropdown]
GLN: [Dropdown]
Use GLN in Elect:
Copy Sell-to Ad: Company [Dropdown]
Tax Liable:
Tax Area Code: N.ATL, GA [Dropdown]
Tax Identificatio: Legal Entity [Dropdown]
Tax Exemption: [Dropdown]
Registration No.: [Dropdown]

Posting Details

Gen. Bus. Postin...: DOMESTIC [Dropdown]
Customer Postin...: DOMESTIC [Dropdown]
Allow Multiple P...:

Prices and Discounts

Currency Code: [Dropdown]
Customer Price: [Dropdown]
Customer Disc: [Dropdown]
Allow Line Disc:
Invoice Disc. Co...: 40000 [Dropdown]

Payments >

1M(8D)

Details

Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No. 40000

1	0	1
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders

#13: Substitute posting groups on-the-fly

The screenshot displays the Dynamics 365 Business Central interface for 'Contoso Electronics' in the 'Environment: USA'.

The main view is 'Alternative Customer Posting Groups' for the 'DOMESTIC' customer. The table below shows the current configuration:

Alternative Customer Posting Group ↑	
→	DOMESTICRISK

The table has a search bar, 'Analyze' toggle, '+ New', 'Edit List', and 'Delete' buttons. The 'DOMESTICRISK' entry is highlighted in the dropdown menu.

On the right, a summary table shows financial data:

Amount Shipped Not Invoiced (\$)	Amount S Not Invoiced (\$)
0.00	
0.00	
0.00	
0.00	
0.00	

#13: Substitute posting groups on-the-fly

The screenshot displays the Dynamics 365 Business Central interface for a Sales Order. The header shows 'Contoso Electronics Dynamics 365 Business Central' and 'Environment: USA'. The main title is 'Sales Order S-ORD101012 · Alpine Ski House'. Below the title are navigation tabs: Home, Prepare, Print/Send, Request Approval, Order, Report, and More options. A secondary bar contains actions: Post..., Release, Create Warehouse Shipment, Create Inventory Put-away/Pick..., and Archive Document. The summary section shows financial totals: Subtotal Excl. Tax (USD) 5,004.00, Total Excl. Tax (USD) 5,004.00, Inv. Discount Amount Excl. Tax 0.00, Total Tax (USD) 350.28, Invoice Discount % 0, and Total Incl. Tax (USD) 5,354.28. The 'Invoice Details' section is expanded, showing a table with columns 'Code' and 'Description'. The table lists 'DOMESTIC' (Domestic customers) and 'DOMESTICRISK' (Domestic customers at risk). The 'Customer Posting Group' field is highlighted with a blue box, and its dropdown menu is open, showing 'DOMESTICRISK' selected. Other fields include Currency Code, Company Bank Account Code, VAT Bus. Posting Group, Payment Terms Code (1M(8D)), Payment Method Code, Tax Liable (checked), Department Code (SALES), Customergroup Code (SMALL), Payment Discount % (2), and Pmt. Discount Date (5/21/2024). A message box on the right states 'No payment service is made available.' The bottom left corner has a 'javascript:' watermark.

#13: Substitute posting groups on-the-fly

Contoso Electronics | Dynamics 365 Business Central | NYC Environment: USA

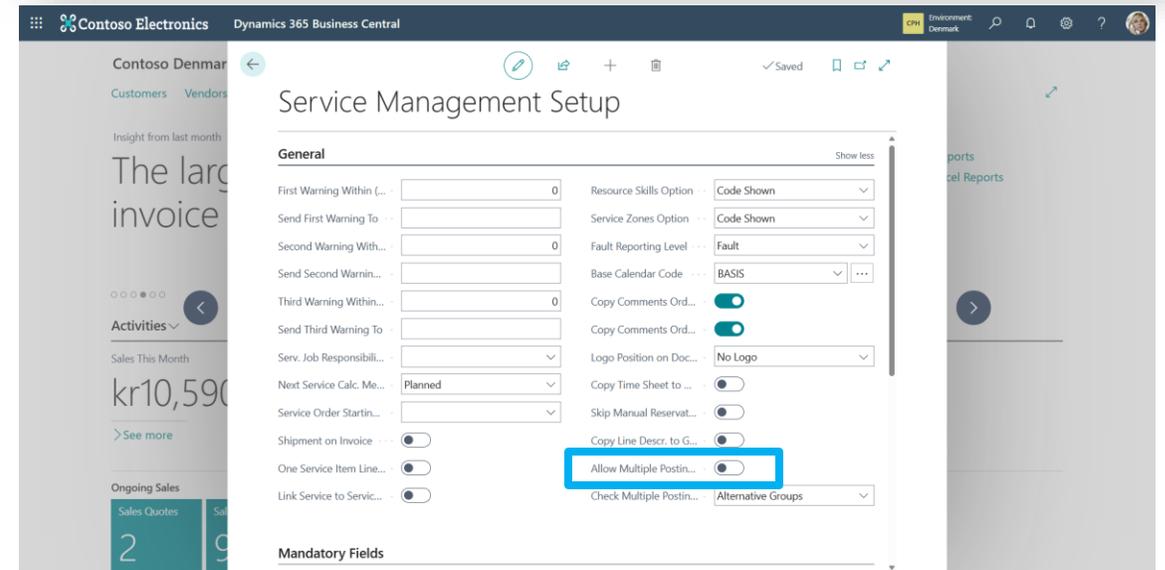
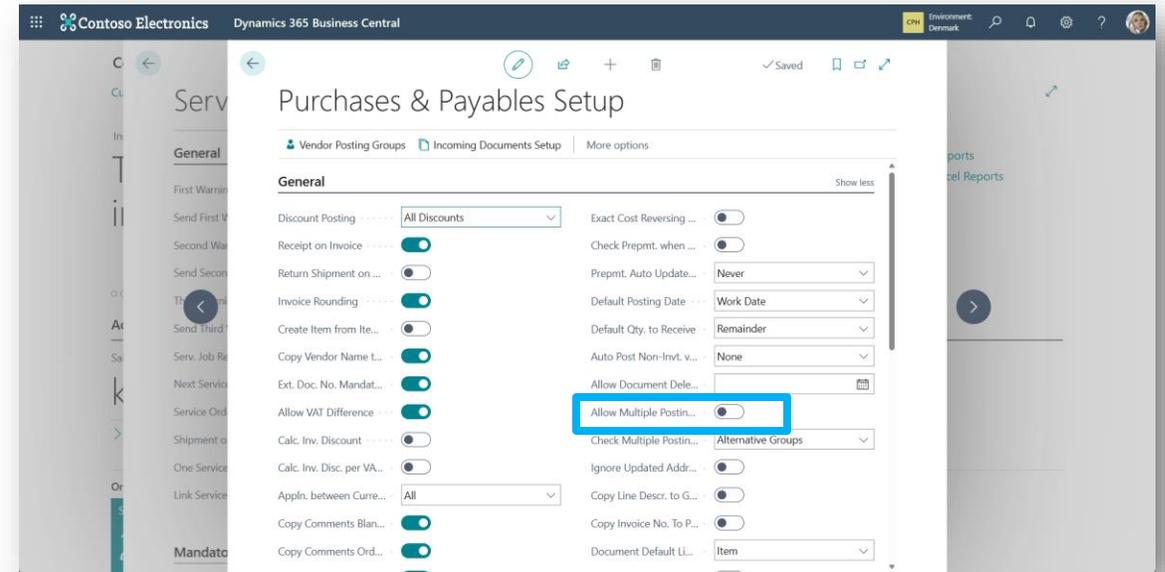
Contoso | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Chart of Accounts: All | Search | New | Delete | Edit List | Home | Account | Balance | Navigate

No.	Name	Net Change	Balance	Income/Ba...	Account Category	Account Subcategory
14250	WIP, Invoiced Sales	-	-	Balance Sh...	Assets	Inventory
14299	Total, Work in Progress	-	-	Balance Sh...	Assets	Inventory
15000	Receivables	-	-	Balance Sh...	Assets	Assets
15100	Accounts Receivables	-	-	Balance Sh...	Assets	Assets
15110	Account Receivable, Domestic	142,411.88	142,411.88	Balance Sh...	Assets	Assets
15115	Account Receivable, Domestic (At risk)	53,542.80	53,542.80	Balance Sh...	Assets	Assets
15120	Account Receivable, Foreign	-	-	Balance Sh...	Assets	Assets
15130	Contractual Receivables	-	-	Balance Sh...	Assets	Assets
15140	Consignment Receivables	-	-	Balance Sh...	Assets	Assets
15150	Credit cards and Vouchers Receivables	-	-	Balance Sh...	Assets	Assets
15199	Total, Account Receivables	195,954.68	195,954.68	Balance Sh...	Assets	Assets
15900	Other Current Receivables	-	-	Balance Sh...	Assets	Assets
15910	Current Receivable from Employees	-	-	Balance Sh...	Assets	Assets
15920	Accrued income not yet invoiced	-	-	Balance Sh...	Assets	Assets

#13: Substitute posting groups on-the-fly

Also possible in
Purchase and Service





Tip # 14

#14: Remainder Quantity on purchase orders

Contoso Electronics Dynamics 365 Business Central

Environment: NYC USA

Purchase Order 106008 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

Document Date: 1/5/2024 Status: Open

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Description	Unit of Measure Code	Quantity	Qty. to Receive	Quantity Received	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
Item	1896-S	ATHENS Desk	PCS	10	4	-	780.70		FURNITURE

Subtotal Excl. Tax (USD) 7,807.00 Total Excl. Tax (USD) 7,807.00

Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00

Invoice Discount % 0 Total Incl. Tax (USD) 7,807.00

Invoice Details > CM

Shipping and Payment > WHITE

#14: Remainder Quantity on purchase orders

The screenshot displays the Dynamics 365 Business Central interface for a purchase order. The header shows 'Contoso Electronics' and 'Dynamics 365 Business Central'. The purchase order number is '106008' for 'Fabrikam, Inc.'. The document date is '1/5/2024' and the status is 'Open'. A modal dialog is open, asking the user to select an action: 'Receive' (selected), 'Invoice', or 'Receive and Invoice'. The dialog has 'OK' and 'Cancel' buttons.

Purchase Order Details:

- Document Date: 1/5/2024
- Status: Open

Lines Table:

Type	No.	Description	Quantity Received	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
Item	1896-S	ATHENS Des	-	780.70		FURNITURE

Summary Table:

Subtotal Excl. Tax (USD)	7,807.00	Total Excl. Tax (USD)	7,807.00
Inv. Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	7,807.00

Invoice Details > CM

Shipping and Payment > WHITE

#14: Remainder Quantity on purchase orders

Contoso Electronics Dynamics 365 Business Central

Environment: USA

Purchase Order 106008 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release... Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

General Show more

Vendor Name: Fabrikam, Inc. Vendor Invoice No.: 12345
Contact: Krystal York
Document Date: 1/5/2024

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Description	Unit of Measure Code	Quantity	Qty. to Receive	Quantity Received	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
→ Item	1896-S	ATHENS Desk	PCS	10	6	4	780.70		FURNITURE

Subtotal Excl. Tax (USD) 7,807.00 Total Excl. Tax (USD) 7,807.00
Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00
Invoice Discount % 0 Total Incl. Tax (USD) 7,807.00

We don't necessarily want this auto filled with remaining quantity

#14: Remainder Quantity on purchase orders

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main window is titled 'Purchases & Payables Setup' and is currently on the 'General' tab. A dropdown menu for 'Default Qty. to Receive' is open, with 'Remainder' selected. The interface includes a left-hand navigation pane with a list of purchase orders, a top navigation bar with the company name and environment details, and a right-hand pane showing vendor information for 'Fabrikam, Inc.'.

General Show less

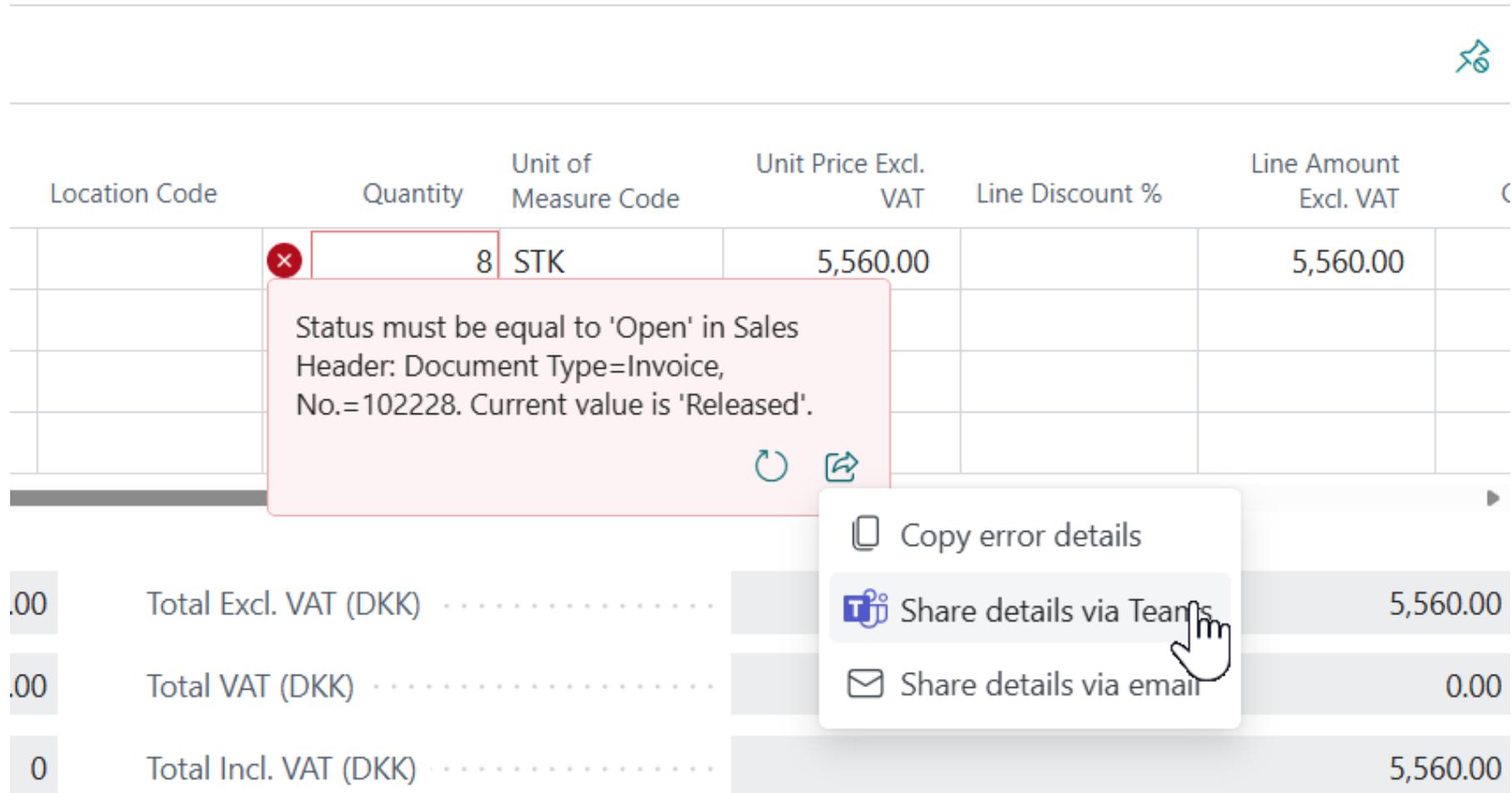
Field	Value
Discount Posting	All Discounts
Receipt on Invoice	On
Return Shipment on ...	Off
Invoice Rounding	On
Create Item from Ite...	Off
Copy Vendor Name t...	On
Ext. Doc. No. Mandat...	On
Allow Tax Difference	On
Calc. Inv. Discount	Off
Calc. Inv. Disc. per Tax...	Off
Appln. between Curre...	All
Copy Comments Blan...	On
Copy Comments Ord...	On
Copy Comments Ord...	On
Copy Cmts Ret.Ord. t...	On
Copy Cmts Ret.Ord. t...	On
Check Prepm. when ...	Off
Prepm. Auto Update...	Never
Default Posting Date	Work Date
Default Qty. to Receive	Remainder
Combine Special Ord...	Blank
Use Vendor's Tax Are...	Off
Auto Post Non-Invt. v...	None
Allow Document Dele...	
Allow Multiple Postin...	On
Check Multiple Postin...	Alternative Groups
Ignore Updated Addr...	Off
Copy Line Descr. to G...	Off
Copy Invoice No. To P...	Off
Document Default Li...	Item
Disable Search by Na...	Off
Link Doc. Date to Pos...	Off

Vendor: 10000 Fabrikam, Inc. 4255550101
Email: york@contoso.com
User: Krystal York



Tip # 15

#15: Get unblocked – Easily share error details



The screenshot shows a software interface with a table of data. A red error message box is overlaid on the table, and a sharing menu is open over the bottom row of the table.

Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	
	8	STK	5,560.00		5,560.00	
.00	Total Excl. VAT (DKK)					5,560.00
.00	Total VAT (DKK)					0.00
0	Total Incl. VAT (DKK)					5,560.00

Error Message: Status must be equal to 'Open' in Sales Header: Document Type=Invoice, No.=102228. Current value is 'Released'.

Sharing Menu:

- Copy error details
- Share details via Teams
- Share details via email

#15: Get unblocked – Easily share error details

TABLES

[Home](#) Prepare F

Post | Rec

The page has an error

Lines | M

Select items...

Type
Item

Subtotal Excl. VAT (DKK)

Inv. Discount Amount E

Microsoft Teams - Copilot for Finance - Microsoft Edge Beta

https://teams.microsoft.com/share?href=https%3A%2F%2Fbusinesscentral.dynamics.com%2F5...

Share to Microsoft Teams

Share to

Type the name of a person, group, or channel

Say something about this

(Use **Ctrl+V** to paste the error details from the clipboard here.)

Link to page:

https://businesscentral.dynamics.com/5e39e051-2efc-43b7-b612-932bd2473990/Denmark?company=CRONUS%20Denmark%20A%2FS&bookmark=1D_JAAAAACLAGAAAAJ7BjEAMAAyADIAMgA4&page=43

Share

Quantity	Unit of Measure
8	STK

Subtotal Excl. VAT (DKK)

Inv. Discount Amount E

#15: Get unblocked – Easily share error details

TABLE OF CONTENTS

Home Prepare F

Post | Rec

The page has an error

Lines | M

Select items...

Type
Item

Subtotal Excl. VAT (DKK)

Inv. Discount Amount E

Microsoft Teams - Copilot for Finance - Microsoft Edge Beta

https://teams.microsoft.com/share?href=https%3A%2F%2Fbusinesscentral.dynamics.com%2F5...

Share to Microsoft Teams

Share to

Type the name of a person, group, or channel

Say something about this

Hey Mary
Can you help me with this error?

Here are the error details to help troubleshooting:

Error message:
Status must be equal to 'Open'

in Sales Header: Document Type=Invoice, No.=102228. Current value is 'Released'.

Internal session ID:
cf1f980f-78a3-4801-8bc5-fcb4a5c6c492

Application Insights session ID:
a143869b-f9a2-442e-8a8e-eba8393a5d57

Share

	Quantity	Unit of Measure
Item	8	STK

Subtotal Excl. VAT (DKK)

Inv. Discount Amount E



Tip # 16

#16: Don't allow posting without Location Code

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the application name 'Dynamics 365 Business Central', the environment 'US', and various utility icons. The main content area is titled 'Inventory Setup' and contains several tabs: 'General', 'Posting', 'Journal Templates', 'Automate', and 'Fewer options'. Under the 'Automate' tab, there are settings for 'Average Cost Period' (set to 'Day'), 'Skip Prompt to Creat...' (disabled), 'Copy Comments Ord...' (enabled), and 'Copy Item Descr. to E...' (disabled). A blue rectangular box highlights the 'Location' section, which contains the 'Location Mandatory' toggle, currently turned on. Below this are sections for 'Dimensions' (with an empty 'Item Group Dimension Code' field) and 'Numbering' (with 'Item Nos.' set to 'ITEM' and 'Direct Transfer Posting' set to 'Receipt and Shipment'). The interface also features a left-hand navigation pane with 'CRONU' and 'Customers Vendors' visible, and a right-hand pane with a 'Show desktop' button at the bottom.

#16: Don't allow posting without Location Code

Dynamics 365 Business Central

Environment: US

Sales Invoice

S-INV102200 · Adatum Corporation

Home Prepare Print/Send Request Approval Invoice Actions Related Automate Fewer options

Post Release

Posting Date: 5/1/2023

Lines Manage Line

Select items... New Line Delete Line

Type	No.	Item Reference No.	Description	Code	Name	Qty	Unit	Price
→ Item	2000-S		SYDNEY Swivel Chair, green	EAST	East Warehouse	2	PCS	190.10
				MAIN	Main Warehouse			
				SILVER	Silver Warehouse			
				WEST	West Warehouse			
				WHITE	White Warehouse			
				YELLOW	Yellow Warehouse			

+ New Select from full list

Subtotal End Tot (USD) 380.20 Total End Tot (USD) 380.20

#16: Don't allow posting without Location Code

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes the application name, environment (US), and user profile. The main content area displays a list of error messages. A single error message is highlighted in a light blue row:

Message Type ↑	Description	Context	Con
<u>Error</u>	<i>Location Code must have a value in Sales Line: Document Type=Invoice...</i>	Sales Header: Invoice,S-INV102200	



Tip # 17

#17: Fully automate Reminders / Dunning letters

The screenshot displays the Dynamics 365 Business Central user interface for Contoso Electronics. The main header shows the company name and navigation tabs for Finance, Cash Management, Sales, Purchasing, and Shopify. A 'My Settings - ADMIN' dialog is open, and within it, the 'Available Roles' dialog is displayed. This dialog lists various roles, with 'Accounts Receivable Administrator' highlighted in blue. The background interface includes a dashboard with a card for 'Sales This Month' showing a value of \$1,906, and a 'KPIs' section with cards for 'Sales Quotes' (2), 'Sales Orders' (9), and 'Completely from Stock' (0).

Available Roles

Display Name
Company Hub
Accountant
→ <u>Accounts Receivable Administrator</u>
Business Manager
Business Manager Evaluation
Service Manager
Sales Order Processor
Manufacturing Manager
Project Manager
Sales and Relationship Manager
Administration of users, security groups and permissions

OK Cancel

#17: Fully automate Reminders / Dunning letters

Contoso Electronics | Dynamics 365 Business Central | Environment: v24

CRONUS USA, Inc. | Posted Documents | Sales Documents | Reminder Documents | Reports | All Reports

Customers | Balance | Sales Orders | Sales Invoices | Sales Return Orders

Reminders

Reminders

Draft Reminders 0	Issued, not paid reminders 0	Reminders not sent 0	Configured automations 3	Automation failures 0
----------------------	---------------------------------	-------------------------	-----------------------------	--------------------------

User Tasks

My User Tasks

Pending User Tasks 0

Self-Service

Current Time Sheet

0

Open Current Time Sheet

Time Sheets

New Time Sheets 0	Time Sheets In progress 0
----------------------	------------------------------

Pending Time Sheets

Submitted Time Sheets 0	Rejected Time Sheets 0	Approved Time Sheets 0
----------------------------	---------------------------	---------------------------

Insights

Customers with overdue balance | Overdue invoices

#17: Fully automate Reminders / Dunning letters

Sending Reminders is a 3-step process

1 Create

2 Issue (Post)

3 Send

#17: Fully automate Reminders / Dunning letters

1 Create

2 Issue (Post)

3 Send

The screenshot shows the Dynamics 365 Business Central interface for 'Reminders Automation'. The top navigation bar includes 'Contoso Electronics' and 'Dynamics 365 Business Central'. The main area displays a table of automation jobs. Three blue callout boxes with numbers 1, 2, and 3 are positioned above the table, with arrows pointing to the first three rows of the table.

Code ↑	Description	Status
CREATE REMINDERS	Create draft Reminders for all customers	On Hold
ISSUE REMINDERS	Issue DOMESTIC reminders	On Hold
SEND REMINDERS - DOMESTIC CUSTOMERS	Send Reminders for domestic customers	On Hold

The interface also features a left-hand navigation pane with sections for 'Reminders' (showing 'Draft Reminders' and 'Issued reminders' counts), 'Self-Service' (with a 'Current Time Sheet' widget), and 'Insights'.

#17: Fully automate Reminders / Dunning letters

1

Create

CREATE REMINDERS

Start | Pause | Refresh | Log entries | Reminders | Actions | Automate | Fewer options

General

Code: CREATE REMINDERS
Description: Create draft Reminders for all customers
Blocked:
Reminder Terms Filter: DOMESTIC|FOREIGN
Status: On Hold

Scheduling

Cadence:

- Manual
- Weekly**
- Monthly
- Custom schedule

Actions | New | Setup | Delete | Merge

Order ↑	Type	Code	Step summary	Stop on error
→ 1	Create Reminder	DEFAULT	Default setup	<input type="checkbox"/>

#17: Fully automate Reminders / Dunning letters

The screenshot shows the Dynamics 365 Business Central interface for configuring reminder automation. The page title is "CREATE REMINDERS" under the "Reminder Automation" section. The top navigation bar includes the Contoso Electronics logo, "Dynamics 365 Business Central", and the environment name "Environment v24".

General

- Code: CREATE REMINDERS
- Blocked:
- Description: Create draft Reminders for all customers
- Reminder Terms Filter: DOMESTIC|FOREIGN
- Status: On Hold

Scheduling

- Cadence: Manual

Actions

- New
- Setup** (highlighted with a blue box)
- Delete
- Move up
- Move down
- Set stop on error

Order ↑	Type	Code	Step summary	Stop on error
→ 1	⋮ Create Reminder	DEFAULT	Default setup	<input type="checkbox"/>

#17: Fully automate Reminders / Dunning letters

The screenshot shows the Dynamics 365 Business Central interface for 'Send Reminders Setup'. The dialog box is titled 'Send Reminders Setup - SEND EMAIL - SEND REMINDERS - DOMESTIC CUSTOMER...'. It is divided into three sections: 'General', 'Report settings', and 'Communication settings'. In the 'General' section, the 'Code' is 'SEND EMAIL' and the 'Description' is 'Default setup'. The 'Report settings' section includes 'Show amounts not due' and 'Show multiple interest...'. The 'Communication settings' section includes 'Log interaction', 'Print reminders', 'Send by email', and 'Attach invoice document...'. A dropdown menu for 'Attach invoice document...' is open, showing options: 'All', 'No', 'Overdue only', and 'All'. A mouse cursor is pointing at the 'Overdue only' option.

Send Reminders Setup - SEND EMAIL - SEND REMINDERS - DOMESTIC CUSTOMER...

Page

General

Code SEND EMAIL Send multiple times f...

Description Default setup

Report settings

Show amounts not due .. Show multiple interest...

Communication settings

Log interaction Print reminders

Use document sendin... Send by email

Attach invoice docum... All

No

Overdue only

All

#17: Fully automate Reminders / Dunning letters

Tailor e-mail texts per Reminder Level

The screenshot displays the Dynamics 365 Business Central interface for configuring Reminder Terms. The top navigation bar includes the company name 'Contoso Electronics', the product 'Dynamics 365 Business Central', and the environment 'LIVE Environment: v24'. The left sidebar shows navigation options for 'CRONUS USA, Inc.', 'Customers', 'Balance', 'Reminders', 'Self-Service', and 'Insights'. The main content area is titled 'Reminder Terms' and features a table with the following columns: Code, Description, Maximum Number of Reminders, Post Interest, Post Additi... Fee, Post Additi... Fee per Line, and Minimum Amount (LCY). Two terms are listed: 'DOMESTIC' for 'Domestic Customers' and 'FOREIGN' for 'Foreign Customers', both with a maximum of 0 reminders and a minimum amount of 0.00. The 'DOMESTIC' row is highlighted in light blue.

Code ↑	Description	Maximum Number of Reminders	Post Interest	Post Additi... Fee	Post Additi... Fee per Line	Minimum Amount (LCY)
<u>DOMESTIC</u>	Domestic Customers	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
FOREIGN	Foreign Customers	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00

#17: Fully automate Reminders / Dunning letters

Tailor e-mail texts per Reminder Level

The screenshot shows the 'Reminder Terms Setup' page in Dynamics 365 Business Central. The page title is 'DOMESTIC · Domestic Customers'. The 'General' section includes fields for 'Reminder Terms Code' (DOMESTIC), 'Description' (Domestic Customers), and 'Maximum Number of ...' (0). The 'Languages with custo...' field shows 'Attachments: ENU' and 'Emails: ENU'. The 'Reminder Level' section has a table with three rows. The first row is highlighted, and the 'Customer Communication' column has a checked checkbox. The 'Customer Communication' button in the toolbar is highlighted with a blue box.

Environment: v24

Reminder Terms Setup

DOMESTIC · Domestic Customers

Customer Communication | More options

General

Show more

Reminder Terms Code ... DOMESTIC

Description Domestic Customers

Maximum Number of ... 0

Languages with custo... Attachments: ENU
Emails: ENU

Reminder Level | New Line | Delete Line | Reminder Level Fees | **Customer Communication** | ...

No. ↑	Grace Period	Due Date Calculation	Calculate Interest	Add. Fee Calculation Type	Customer Communi...
→ 1	2D	1M	<input type="checkbox"/>	Fixed	<input checked="" type="checkbox"/>
2	2D	1M	<input type="checkbox"/>	Fixed	<input type="checkbox"/>
3	2D	1M	<input type="checkbox"/>	Fixed	<input type="checkbox"/>

Languages with customer communications Attachments: ENU
Emails: ENU

#17: Fully automate Reminders / Dunning letters

Tailor e-mail texts per Reminder Level

General Show more

Reminder Terms Code: DOMESTIC Languages with custo... Attachments: ENU Emails: ENU

Description: Domestic Customers

Maximum Number of ...: 0

Reminder Level | New Line | Delete Line | Reminder Level Fees | Customer Communication | ...

No. ↑	Grace Period	Due Date Calculation	Calculate Interest	Add. Fee Calculation Type	Custom Comm
→ 1	2D	1M	<input type="checkbox"/>	Fixed	
2	2D	1M	<input type="checkbox"/>	Fixed	
3	2D	1M	<input type="checkbox"/>	Fixed	

Subject Oops! We're missing your payment

Greeting

Hey!

Body Text

We noticed you have outstanding payments, and this is a friendly reminder 😊
We're all busy, and it probably just slipped through the cracks.

The payment was due on %1, and we've attached a copy of the invoice for your convenience.

Thank you!

Subject Is everything alright?

Greeting

Hi

Body Text

You haven't responded to our last reminder, which was due on %1, and we still haven't received payment 😞
Could you please take the time to bring this in order with your accountant.

We appreciate it!

Thank you!

Subject Let's make you an offer you can't refuse

Greeting

Hello

Body Text

It seems you're not getting our reminders and don't have your books entirely in order.
We're sending over the collections family to help sort this out and restore the good nature of our relationship 🙏

It'll only take 5 minutes!

👉



Tip # 18

#18: Revaluation of G/L Account (track source currency code & amount on G/L)

Contoso Electronics Dynamics 365 Business Central

Environment: v24

25400 Current Loans

General Ledger Entries

Posting Date	Document Type	Document No.	G/L Account No.	Description	Source Currency Code	Source Currency Amount	Amount (\$)	Department Code
→ 1/18/2024	Payment	BANK1	25400	Current Loans	EUR	-10,000.00	-9,952.00	

#18: Revaluation of G/L Account (track source currency on G/L)

Contoso Electronics Dynamics 365 Business Central Environment: LI VE v24

Feature Management ✓ Saved

Feature Management: All 🔍 📄 🔗 Edit List 🔗 🔍 ☰

Feature		Automatically enabled from	Automatically enabled from version
Feature Update: Replace the existing EU 3-Party Trade Purchase functionalit...	Learn more	2025 Wave 1 (from April to Se...	26.0
Feature Update: Enable use of new extensible exchange rate adjustment, in...	Learn more	2025 Wave 1 (from April to Se...	26.0
Feature Update: Enable use of new extensible invoice posting engine	Learn more	2025 Wave 1 (from April to Se...	26.0
→ <u>Feature Update: Enable use of G/L currency revaluation</u>	⋮ Learn more	2025 Wave 2 (from October 20...	27.0
Feature: Convert user group permissions	Learn more	2024 Wave 2 (from October 20...	25.0
Feature Update: Enable using 1099 forms to transmit the tax data to the IRS...	Learn more	2025 Wave 2 (from October 20...	27.0
Feature Update: Enable use of package tracking in physical inventory orders	Learn more	2025 Wave 2 (from October 20...	27.0
Feature Update: Use new communication texts for reminder terms	Learn more	2025 Wave 2 (from October 20...	27.0
Feature Update: Replace the existing Intrastat functionality with the new Int...	Learn more	2024 Wave 2 (from October 20...	25.0
Feature: Enable using SAF-T Audit Files Exports	Learn more	2025 Wave 1 (from April to Se...	26.0
Feature Update: New sales pricing experience	Learn more	2025 Wave 1 (from April to Se...	26.0
Feature Update: Auto-save with every field change	Learn more	2024 Wave 2 (from October 20...	25.0
Feature: Enable using bulk operations for Shopify connector	Learn more	2025 Wave 1 (from April to Se...	26.0
Feature Update: Use new customer and item templates in Shopify; instead o...	Learn more	2024 Wave 2 (from October 20...	25.0

#18: Revaluation of G/L Account (track source currency on G/L)

The screenshot displays the Dynamics 365 Business Central interface for a G/L Account Card. The account name is "25400 · Current Loans". The top navigation bar includes the Contoso Electronics logo, "Dynamics 365 Business Central", and environment information "LI VE Environment: v24".

The main content area is divided into sections:

- Account Information:** Includes "Home", "Account", "Balance", and "More options" tabs. Below are "Posted Documents w...t Incoming Document" and "Apply Template..." options.
- Posting Groups:** Fields for "Gen. Prod. Posting Group", "VAT Bus. Posting Group", "Default IC Partner G/L Acc. No.", and "Default Deferral Template".
- Revaluation Section:**
 - "Source Currency Posting" and "Source Currency Code" dropdown menus. A blue mouse cursor is pointing at the "Source Currency Code" dropdown, which is open, showing options: "Multiple Currencies", "Same Currency", and "LCY Only".
 - "Source Currency Revaluation" and "Unrealized Revaluation" toggle switches, both currently turned off.
- Consolidation & Reporting:** Includes expandable sections for "Consolidation" and "Reporting".

At the bottom right, there are buttons for "Average Rate (Manual) | No" and "No Adjustment".

#18: Revaluation of G/L Account (track source currency on G/L)

The screenshot shows the Dynamics 365 Business Central interface for a G/L Account Card. The account is '25400 · Current Loans'. The top navigation bar includes 'Contoso Electronics', 'Dynamics 365 Business Central', and 'Environment: v24'. The main content area has a breadcrumb trail: Home > Account > Balance > Related > Reports > Automate > Fewer options. A dropdown menu is open under 'Account', with 'Source Currencies' highlighted. Other options in the menu include 'General Posting Setup', 'Tax Posting Setup', 'G/L Register', and 'Other'. Below the menu, the 'Revaluation' section contains two dropdowns for 'Source Currency Posting' and 'Source Currency Code', and two toggle switches for 'Source Currency Revaluation' and 'Unrealized Revaluation'. The 'Consolidation' section has a dropdown set to 'Average Rate (Manual)' and a 'No' button. The 'Reporting' section has a 'No Adjustment' button.

Contoso Electronics Dynamics 365 Business Central Environment: v24

G/L Account Card 25400 · Current Loans

Home Account Balance Related Reports Automate Fewer options

Dimensions Commerce Account Source Currencies Extended Text Receivables-Payables

Gen. Prod. Posting Group General Posting Setup Other Default IC Partner G/L Acc. No

VAT Bus. Posting Group Tax Posting Setup Default Deferral Template

G/L Register

Other

Revaluation

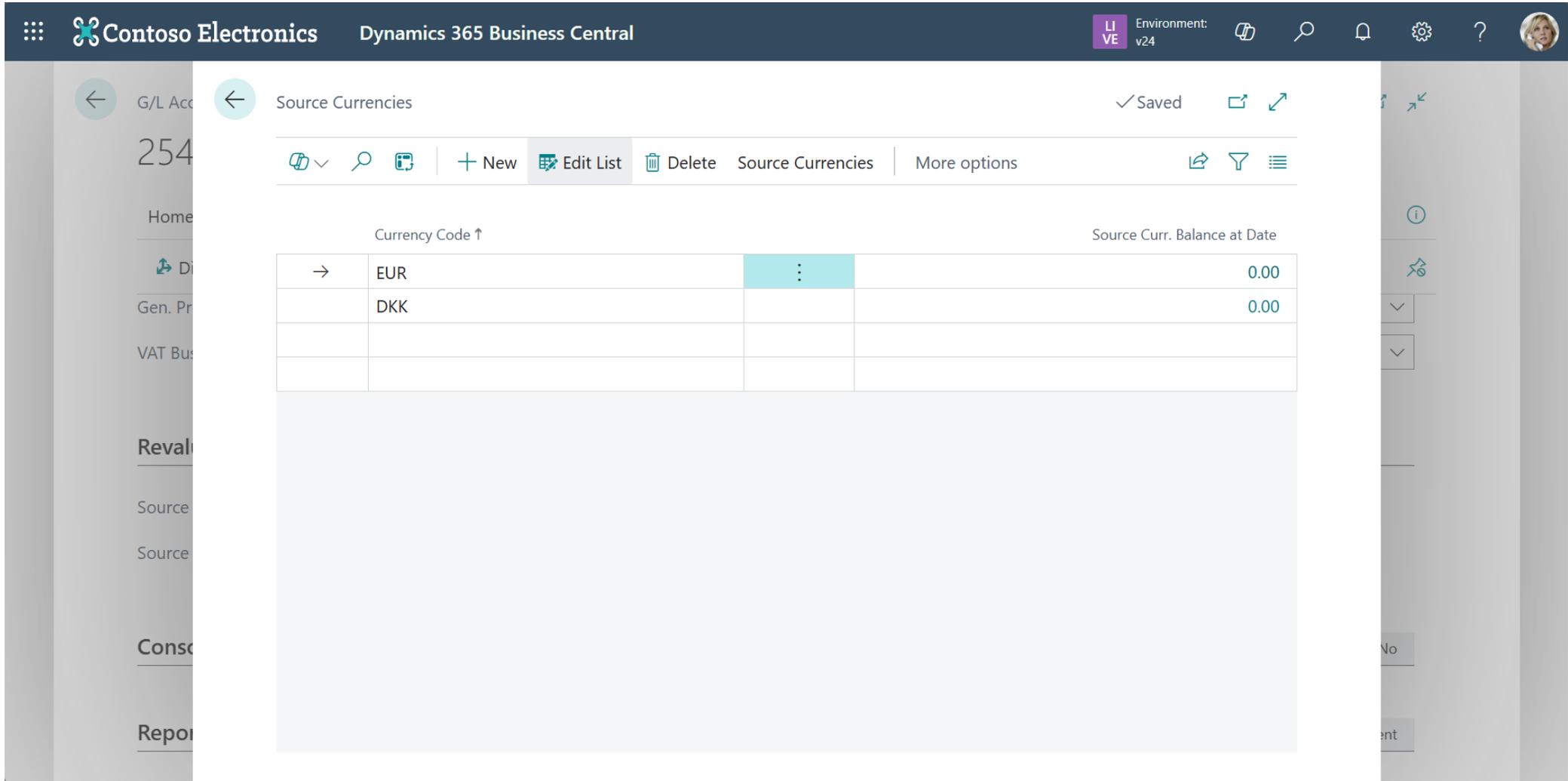
Source Currency Posting Source Currency Revaluation

Source Currency Code Unrealized Revaluation

Consolidation Average Rate (Manual) No

Reporting No Adjustment

#18: Revaluation of G/L Account (track source currency on G/L)



The screenshot shows the Dynamics 365 Business Central interface for the 'Source Currencies' page. The top navigation bar includes the 'Contoso Electronics' logo, 'Dynamics 365 Business Central', and environment information 'LI VE Environment: v24'. The page title is 'Source Currencies' with a 'Saved' status indicator. The main content area features a table with the following data:

	Currency Code ↑		Source Curr. Balance at Date
→	EUR	:	0.00
	DKK		0.00

The interface also includes a left-hand navigation pane with options like 'G/L Acc', 'Home', 'Reval', 'Source', and 'Consolidation', and a right-hand pane with various utility icons and a user profile picture.

#18: Revaluation of G/L Account (track source currency on G/L)

Contoso Electronics Dynamics 365 Business Central Environment: v24

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

Chart of Accounts: All + New Delete Edit List Home Account Balance

No.	Name				
25100	Clearing Account for Factoring, Cur				
25200	Current Liabilities to Employees				
25300	Clearing Account for third party				
25400	Current Loans	-9,952.00	-9,952.00	Balance Sh...	Liabilities
25500	Liabilities, Grants Received	-	-	Balance Sh...	Liabilities
25999	Total, Other Current Liabilities	-9,952.00	-9,952.00	Balance Sh...	Liabilities
26000	Accrued Expenses and Deferred Income			Balance Sh...	Liabilities
26100	Accrued wages/salaries	-	-	Balance Sh...	Liabilities
26200	Accrued Holiday pay	-	-	Balance Sh...	Liabilities
26300	Accrued Pension costs	-	-	Balance Sh...	Liabilities
26400	Accrued Interest Expense	-	-	Balance Sh...	Liabilities
26500	Deferred Income	-	-	Balance Sh...	Liabilities

Posted Documents without Incoming Document
Indent Chart of Accounts
G/L Currency Revaluation
Close Income Statement
Review Entries

Revaluates per currency, not per transaction!



Tip # 19

#19: Manage Copilot features

CRONUS USA, Inc. | Finance

Customers Vendors Items Bank

Get started

Hi, meet Bus

You're all set to try out our demo on your own, or take a quick tour first.

Show demo tours

Activities

Sales This Month

\$1,906

See more

Ongoing Sales

Sales Quotes	Sales Orders	Co from
2	11	0

Copilot & AI capabilities

Learn about Copilot

Copilot and other generative AI capabilities use Azure OpenAI Service. Your environment connects to Azure OpenAI Service in your region. [How do I govern my Copilot data?](#)

Production ready previews | Deactivate Supplemental Terms of Use

Capability ↑	Status	Publisher	
→ Chat	Active	Microsoft	Learn More
Analyze list	Active	Microsoft	Learn More
E-Document Matching Assistance	Active	Microsoft	Learn More
Bank Account Reconciliation	Active	Microsoft	Learn More
Sales Lines Suggestions	Active	Microsoft	Learn More

Generally available | Deactivate Supplemental Terms of Use

Capability ↑	Status	Publisher	
→ Marketing text suggestions	Active	Microsoft	Learn More

Some features connect to other Microsoft

Scan documents

Create Incomin...



Tip # 20

#20: Share report settings across the company

Dynamics 365 Business Central

Environment: Production

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

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer | ...

No. ↑	Name	Address	City	ZIP Code	State	Responsibility Center	Location Cod
10000	Adatum Corporation	192 Market Square	Atlanta	31772	GA		
20000	Trey Research	153 Thomas Drive	Chicago	61236	IL		
30000	School of Fine Art	10 High Tower Green	Miami	37125	FL		
40000	Alpine Ski House	10 Deerfield Road	Atlanta	31772	GA		
<u>50000</u>	⋮ Relecloud	25 Water Way	Atlanta	31772	GA		

#20: Share report settings across the company

Dynamics 365 Business Central

Environment: Production

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

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer

No. ↑	Name	Address	City	State	Country
10000	Adatum Corporation	192 Market Square	Atlanta		
20000	Trey Research	153 Thomas Drive	Chicago		
30000	School of Fine Art	10 High Tower Green	Miami	37125	FL
40000	Alpine Ski House	10 Deerfield Road	Atlanta	31772	GA
<u>50000</u>	Relecloud	25 Water Way	Atlanta	31772	GA

Report menu options:

- Prices & Discounts
- Report
- More options

Report sub-menu options:

- Scheduled Statements
- Statement
- Customer Order Summary

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface for the 'Customer - Order Summary' report. The background shows a list of customers for 'CRONUS USA, Inc.' with columns for 'No.' and 'Name'. The '50000' customer, 'Relecloud', is selected. The report settings dialog is open, showing the following configuration:

- Printer:** (Handled by the browser)
- Report Layout:** ./Sales/Reports/CustomerOrderSummar...
- Use default values from:** Last used options and filters
- Options:**
 - Show Amounts in \$
 - Starting Date
- Filter: Customer:**
 - State: GA

At the bottom of the dialog are buttons for 'Send to...', 'Print', 'Preview', and 'Cancel'. A dropdown menu is open for the 'Use default values from' field, showing a list of options with 'Last used options and filters' selected. A 'Select from full list' button is highlighted in the dropdown menu.

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. The main window shows the 'Customer - Order Summary' report for 'CRONUS USA, Inc.'. A modal dialog titled 'Select - Report Settings' is open, showing a table of report settings. The table has columns for Name, Report ID, Report Name, Assigned to, Created by, and a checkbox for 'Share with all users'. The row for 'Last used options and filters' is selected, showing Report ID .107, Report Name 'Customer - Order Summary', Assigned to 'ADMIN', and Created by 'ADMIN'. The 'Share with all users' checkbox is currently unchecked. The dialog also includes an 'Analyze' toggle, an 'Edit List' button, and 'OK' and 'Cancel' buttons at the bottom.

Name ↑	Report ID ↑	Report Name	Assigned to ↑	Created by	Share with all users	Corr
→ Last used options and filters	.107	Customer - Order Summary	ADMIN	ADMIN	<input type="checkbox"/>	CRC

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.' and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. The current view is 'Customer - Order Summary'. A modal dialog titled 'Select - Report Settings' is open, showing a list of reports. The report 'Last used options and filte...' is selected, and a context menu is open over it with the 'New' option highlighted. The dialog also features an 'Analyze' toggle, an 'Edit List' button, and 'OK' and 'Cancel' buttons at the bottom. The background report table has columns for Name, Report ID, Assigned to, Created by, and Location Cod.

No. ↑	Name ↑	Report ID ↑	Assigned to ↑	Created by	Location Cod
10000					
20000					
30000	→ Last used options and filte...	.107	ADMIN	ADMIN	
40000					
50000					

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.', 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Shopify', and 'All Reports'. The current report is 'Customer - Order Summary'. A 'Select - Report Settings' dialog box is open, and within it, a 'Pick Report' dialog box is displayed. The 'Pick Report' dialog has the following fields and controls:

- Name:** Georgia customers
- Report Name:** Customer - Order Summary
- Report ID:** 107
- Company Name:** CRONUS USA, Inc.
- Shared with All Users:** A toggle switch that is currently turned on.

At the bottom of the 'Pick Report' dialog are 'OK' and 'Cancel' buttons. The background shows a table with columns for 'No.' and 'Name', with values ranging from 10000 to 50000. Other UI elements like 'Send to...', 'Print', 'Preview', and 'Cancel' buttons are visible at the bottom of the report view.

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.', 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. A 'Customers' list is visible on the left, with 'All' selected and a search bar. A 'Select - Report' dialog is open, showing a list of reports with '50000' selected. The 'Customer - Order Summary' dialog box is the primary focus, containing the following fields and options:

- Customer - Order Summary** (Title)
- Starting Date: 10/04/2023
- Filter: Customer**
- × State: GA
- × No.: [Empty]
- × Search Name: [Empty]
- × Customer Posting Group: [Empty]
- + Filter...
- Filter totals by:
- × Currency Filter: [Empty]
- OK and Cancel buttons

In the background, a 'Share with all users' dialog is partially visible, showing a list of users with 'CRC' selected.

#20: Share report settings across the company

The screenshot shows the Dynamics 365 Business Central interface. The main window displays the 'Customer - Order Summary' report for 'CRONUS USA, Inc.'. A dialog box titled 'Select - Report Settings' is open, showing a table of report settings. The 'Created by' field is highlighted with a blue box, and the 'Share with all users' checkbox is checked.

Name ↑	Report ID ↑	Report Name	Assigned to ↑	Created by	Share with all users	Corr
→ Georgia customers	.107	Customer - Order Summary		ADMIN	<input checked="" type="checkbox"/>	CRC
Last used options and filte...	107	Customer - Order Summary	ADMIN	ADMIN	<input type="checkbox"/>	CRC

Buttons: OK, Cancel

#20: Share report settings across the company

Dynamics 365 Business Central Environment: Production

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

Customers: All | Search

No. ↑	Name
10000	Adatum Corporat
20000	Trey Research
30000	School of Fine Art
40000	Alpine Ski House
50000	Relecloud

Customer - Order Summary

Printer: (Handled by the browser)

Report Layout: ./Sales/Reports/CustomerOrderSummar... [...]

Use default values from: Last used options and filters

Options

Show Amounts in \$

Starting Date

Name ↑

- Georgia customers
- Last used options and filters

Show details Select from full list

Filter: Customer

× State: GA

Send to... Print Preview Cancel



Tip # 21

#21: Upload multiple files in the new Document Attachment FactBox

The screenshot displays the Dynamics 365 Business Central interface for a document titled "Wide World Importers". The top navigation bar includes the "Dynamics 365 Business Central" logo, the environment name "Environment: v25US", and various utility icons. The main content area shows the document details, including the invoice number "40000", the contact "Toby Rhode", and the document date "01/05/2024". The "Attachments" factbox is open, showing a "Documents" menu with the "Upload files" option highlighted. The "Attachments (0)" section is currently empty, displaying the message "nothing to show in this view".

Wide World Importers

Request Approval Invoice | More options

Statistics Comments Attachments Approvals Vendor

Details Attachments (0)

Documents ▾

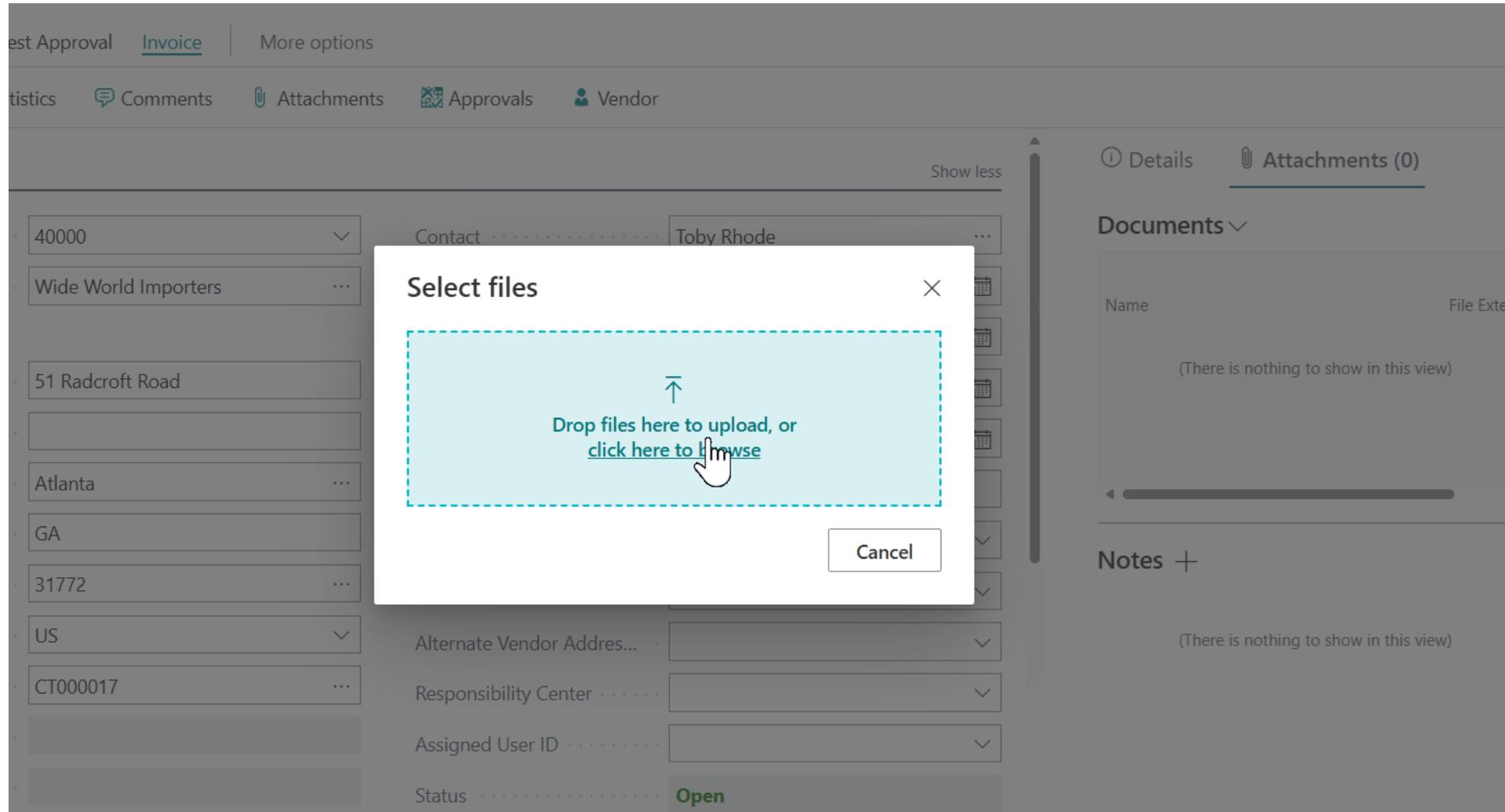
- Show details
- Upload files**
- Download
- Open in Excel
- Delete Line

nothing to show in this view

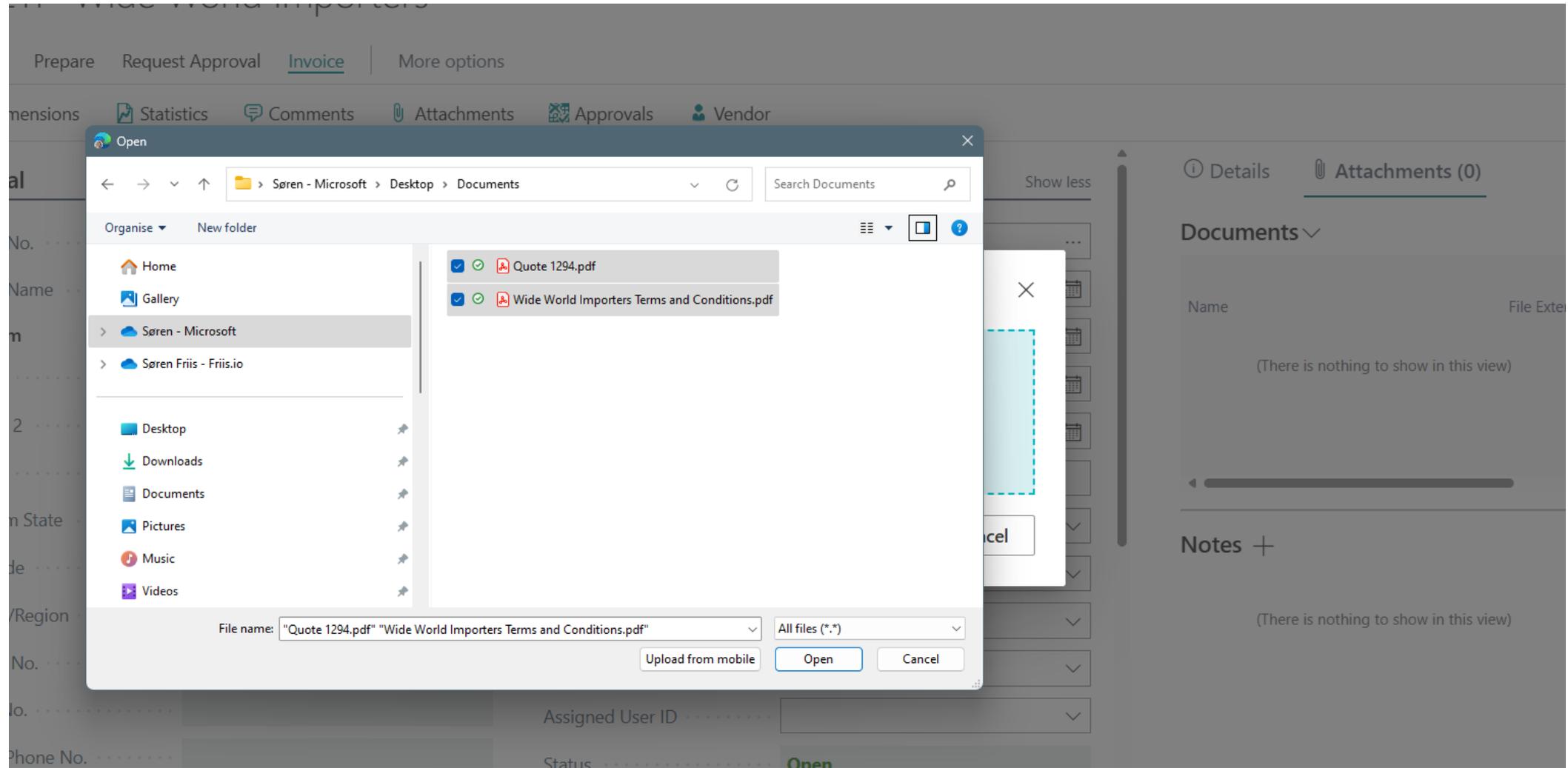
Notes +

(There is nothing to show in this view)

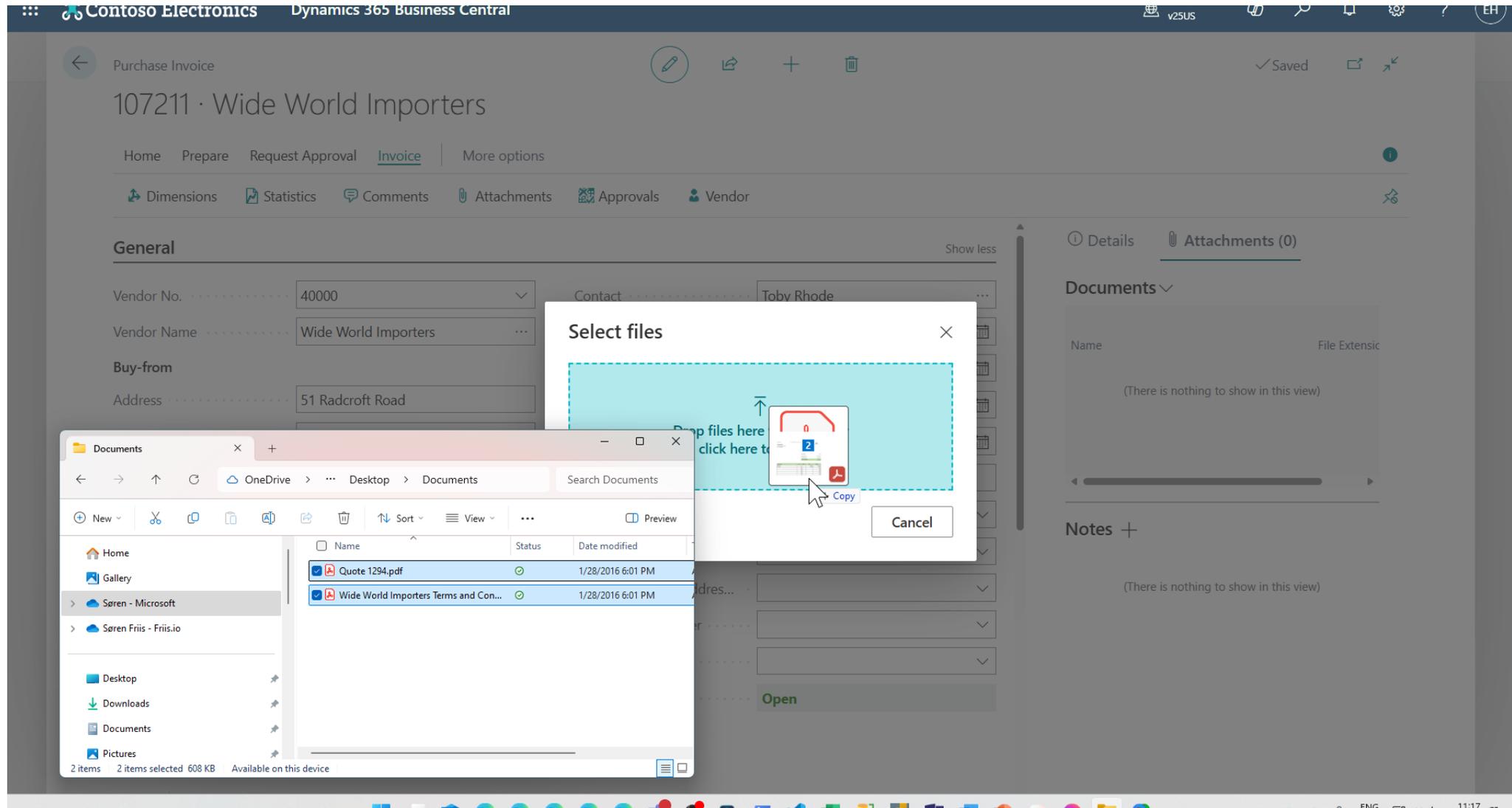
#21: Upload multiple files in the new Document Attachment FactBox



#21: Upload multiple files in the new Document Attachment FactBox



#21: Upload multiple files in the new Document Attachment FactBox



#21: Upload multiple files in the new Document Attachment FactBox

The screenshot displays the Dynamics 365 Business Central interface for a Purchase Invoice. The breadcrumb trail is: Contoso Electronics > Dynamics 365 Business Central > Purchase Invoice > 107211 · Wide World Importers. The main navigation bar includes Home, Prepare, Request Approval, Invoice (selected), and More options. Below this is a secondary navigation bar with Dimensions, Statistics, Comments, Attachments, Approvals, and Vendor. The main content area is divided into two sections: General and Attachments (2).

General (Show less)

Vendor No.	40000	Contact	Toby Rhode
Vendor Name	Wide World Importers	Document Date	01/05/2024
Buy-from		Invoice Received Date	
Address	51 Radcroft Road	Posting Date	01/05/2024
Address 2		Due Date	31/05/2024
City	Atlanta	Vendor Invoice No.	107211
Buy-from State	GA	Purchaser Code	
Post Code	31772	Campaign No.	
Country/Region	US	Alternate Vendor Address	
Contact No.	CT000017	Responsibility Center	
Phone No.		Assigned User ID	
Mobile Phone No.		Status	Open
Email	wide.world.importers@contoso.com		

Attachments (2)

Name	File Extension
Quote 1294	pdf
Wide World Importers Terms and...	pdf

Notes +

(There is nothing to show in this view)

At the bottom left, there are links for Lines, Manage, and Line. At the bottom right, there are icons for sharing and printing.

#21: Upload multiple files in the new Document Attachment FactBox

The screenshot displays the Dynamics 365 Business Central interface for a Purchase Invoice. The main header shows 'Personalising: Purchase Invoice' and 'Field'. The breadcrumb trail is 'Purchase Invoice > 107211 · Wide World Importers'. The 'Invoice' tab is active, with other tabs like 'Home', 'Prepare', 'Approve', and 'Request Approval' visible. A navigation bar includes 'Dimensions', 'Statistics', 'Comments', 'Attachments', 'Approvals', and 'Vendor'. The 'General' section contains fields for Vendor No. (40000), Vendor Name (Wide World Importers), Buy-from Address (51 Radcroft Road), City (Atlanta), Buy-from State (GA), Post Code (31772), Country/Region (US), Contact No. (CT000017), Contact (Toby Rhode), Document Date (01/05/2024), Invoice Received Date, Posting Date (01/05/2024), Due Date (31/05/2024), Vendor Invoice No. (107211), Purchaser Code, Campaign No., Alternate Vendor Address, Responsibility Center, Assigned User ID, and Status (Open). On the right, the 'Attachments (2)' FactBox is open, showing a table of documents:

Name	File Extension
Quote 1294	pdf
Wide World Importers Terms and...	pdf

Below the table are sections for 'Links' and 'Notes'. A note at the bottom states '(There is nothing to show in this view)'. A red 'X' is drawn over the 'Attachments' section header in the FactBox.



Tip # 22

#22: Get insights into usage of BC – enable Application Insights

Contoso Electronics Dynamics 365 Business Central admin center

+ New Refresh Environment Transfers Recently deleted environments

Environments

Name	Application Family	Type	State	Country/region	Current Version	Available Update Version
USA	Business Central	Production	Active	US	23.5.16502.16589	
Denmark	Business Central	Sandbox	Active	DK	23.5.16502.16589	
Germany	Business Central	Sandbox	Active	DE	23.5.16502.16589	
v24	Business Central	Sandbox	Active	US	24.0.16410.17628	

Essentials

Service health

0 incidents or advisories.

#22: Get insights into usage of BC – enable Application Insights

Contoso Electronics Dynamics 365 Business Central admin center

Apps Sessions Database Support Update Settings Copy Restore Rename Delete Refresh

Environments

Notification Recipients

Microsoft Entra Apps

Telemetry

Reported Outages

Operations

Capacity

Environments > USA

Details				Active ⓘ
Name	Application Family	Country/region	Azure Region	
USA	Business Central	US	East US	
Type	Telemetry ⓘ Not Set (Define)	Security Group	Access with Microsoft 365 Licenses ⓘ	
		Not Set (Define)	Off (Modify)	
URL https://businesscentral.dynamics.com/aae2ad71-f6d2-45bd-a4f3-00851793cdba/USA				

Version Management			
Application Version	Platform Version	Available Update Version	Update Scheduling Available ⓘ
23.5.16502.16589	23.0		

#22: Get insights into usage of BC – enable Application Insights

Azure services

Create a resource

Application Insights

Application Insights ☆

+ Create View

Recent resources

Test
3 hours ago

Free training from Microsoft

[Instrument server-side web application code w...](#)
6 units · 34 min

Useful links

[Overview](#) ↗
[Get started](#) ↗
[Documentation](#) ↗
[Pricing](#) ↗

Resources

Recent Favorite

Name

Test

Development

Friis.io

DefaultWorkspace-68a95aae-14

LogAnalyticsDefaultResources

See all

Navigate

Subscriptions

Resource groups

All resources

Dashboard

Storage accounts

Event Grid

Azure Data Explorer...

Monitor

More services

	Last Viewed
on Insights	3 hours ago
e group	a day ago
tion	2 days ago
lytics workspace	2 days ago
e group	2 days ago

#22: Get insights into usage of BC – enable Application Insights

Home >

Test Application Insights

Search

Application Dashboard Getting started Search Logs Monitor resource group Feedback Favorites Rename Delete

Essentials JSON View

Resource group (move) : [Development](#) Instrumentation Key : a8e19870-3fd2-40da-8801-a1aae7a2730d

Location : West Europe Connection String : `InstrumentationKey=a8e19870-3fd2-40da-8801-a1aae7a2730d;Ingestio`

Subscription (move) : [Friis.io](#) Workspace : [DefaultWorkspace-68a95aae-1423-4517-ace2-9c2da6599c2b-WEU](#)

Subscription ID : 68a95aae-1423-4517-ace2-9c2da6599c2b

Tags (edit) : [Add tags](#)

Show data for last:

30 minutes **1 hour** 6 hours 12 hours 1 day 3 days 7 days 30 days

Failed requests

Failed requests (Count) test: 0

Server response time

Server response time (Avg) test: --

Server requests

Server requests (Count) test: 0

Monitoring

- Alerts
- Metrics

Application map Smart detection Live metrics Transaction search Availability Failures Performance Troubleshooting guides (preview)

#22: Get insights into usage of BC – enable Application Insights

The screenshot shows the Dynamics 365 Business Central admin center interface. The left sidebar contains navigation options: Environments, Notification Recipients, Microsoft Entra Apps, Telemetry, Reported Outages, Operations, and Capacity. The main content area displays the 'USA' environment details, including its name, application family (Business Central), country/region (US), type (Production), and URL. A 'Version Management' section shows the application version (23.5.16502.16589) and platform version (23.0). On the right, a 'Logging telemetry' configuration panel is open, showing the 'Enable telemetry' toggle is turned on and the 'Connection String' field contains the value: `InstrumentationKey=a8e19870-3fd2-40da-8801-a1aae7a2730d;Ing`. The 'Save' and 'Cancel' buttons are visible at the bottom of the panel.

Logging telemetry
USA

Enter the connection string for the Azure Application Insights resource where you want telemetry to be stored for the environment. [Learn more](#)

Caution: Applying this connection string requires a restart to the environment. We recommend doing this when no users are active in Business Central.

Enable telemetry

Connection String *

`InstrumentationKey=a8e19870-3fd2-40da-8801-a1aae7a2730d;Ing`

Save Cancel

Details			
Name	Application Family	Country/region	
USA	Business Central	US	
Type	Telemetry (2)	Security Group	
Production	Not Set (Define)	Not Set (Define)	
URL			
https://businesscentral.dynamics.com/aae2ad71-f6d2-45bd-a4f3-00851793cdba/USA			

Version Management			
Application Version	Platform Version	Available Update Version	
23.5.16502.16589	23.0		
Update will start on or after	Update Window (UTC-06:00) (2)	Update Rollout State (2)	
	09:00 PM - 04:00 AM (Modify)		

#22: Get insights into usage of BC – enable Application Insights

Usage ▾

Search

File ▾ Export ▾ Chat in Teams Get insights Subscribe to report

Tenant/Environment/Company: All ▾

Application areas (base application)

This page shows which parts of the Business Central base application the users use (or do not use).

Usage by Application areas

Area	Count
Sales	167
Finance	114
Purchasing	46
Inventory	72
Project Management	14
Warehouse Management	8
Manufacturing	4
Relationship Management	4
Assembly Management	2
Assembly	2
Human Resources	0
Payment	0
Service Management	0
Total	448

Page views and reports run

Area	Count
Sales	184
Finance	114
G/L	50
Payment	33
Currency	12
Dimensions	10
Item charges	6
Financial reporting	2
Fixed Assets	1
Intercompany	1
Tax	1
VAT	1
Workflow	1
Inventory	72
Purchasing	46
Planning	45
Project Management	14
Warehouse Management	8
Manufacturing	4
Relationship Management	4
Assembly Management	2
Assembly	2
Human Resources	0
Payment	0
Service Management	0
Total	448

Application area usage by Environments

Count	Area	Sub Area	Domain	AAD tenant Id	Environment Name
167	Sales				
45	Inventory				

Go back



Tip # 23

#23: Prevent negative inventory

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the logo, 'Dynamics 365 Business Central', and the environment 'US'. The main content area is titled 'Inventory Setup' and has tabs for 'General', 'Posting', 'Journal Templates', 'Automate', and 'Fewer options'. The 'General' tab is active, showing various settings. A blue box highlights the 'Prevent Negative Inventory' toggle, which is currently turned on. Other visible settings include 'Automatic Cost Posting' (on), 'Expected Cost Posting' (off), 'Automatic Cost Adjustment' (Always), 'Default Costing Method' (FIFO), 'Average Cost Calculation Type' (Item & Location & Variant), 'Average Cost Period' (Day), 'Copy Comments on Order' (on), 'Outbound Warehouse Handling' (empty), 'Inbound Warehouse Handling' (empty), 'Variant Mandatory if...' (off), 'Skip Prompt to Create...' (off), and 'Copy Item Description to...' (off). The 'Location' section is partially visible at the bottom.

General Show less

- Automatic Cost Posting ·
- Expected Cost Posting ·
- Automatic Cost Adjus... · Always
- Default Costing Meth... · FIFO
- Average Cost Calc. Ty... · Item & Location & Variant
- Average Cost Period · Day
- Copy Comments Ord... ·
- Copy Comments Ord... ·
- Outbound Whse. Han... ·
- Inbound Whse. Handl... ·
- Prevent Negative Inv...** ·
- Variant Mandatory if ... ·
- Skip Prompt to Creat... ·
- Copy Item Descr. to E... ·

Location

Location Mandator...

Example of blocking negative inventory at sales invoice posting

Dynamics 365 Business Central

Environment: US

Error Messages

Search Open Related Record

Message Type ↑	Description	Context	Context Field Name	Source
Error	You have insufficient quantity of Item 1896-S on inventory.	Sales Line: Invoice,S-INV102201,10...		-

Show desktop

Override on the individual items

Most permissive wins

Dynamics 365 Business Central

Environment Production

Item Card

1900-S · PARIS Guest Chair, black

Home Request Approval Item Prices & Discounts Actions Related Reports Automate Fewer options

Copy Item Adjust Inventory Create Stockkeeping Unit Apply Template Add to Shopify

Inventory

Shelf No. Qty. on Asm. Component 0

Created From Catalog It...

Search Description PARIS GUEST CHAIR, BLACK

Quantity on Hand 0

Qty. on Purch. Order 8

Qty. on Sales Order 0

Qty. on Job Order 0

Qty. on Assembly Order 0

Stockout Warning Default (Yes)

Prevent Negative Invent... No

Net Weight Default (Yes)

Gross Weight 9.55

Unit Volume 0.25

Over-Receipt Code

Costs & Posting

Costing Method FIFO

Standard Cost 150.30

Posting Details

Gen. Prod. Posting Group RETAIL

Tax Group Code FURNITURE

Details Attachments (0)

Picture



Marketing Text

Create with Copilot Edit



Tip # 24

#24: Define checklists for users and roles

The screenshot displays the Dynamics 365 Business Central user interface. At the top, the header includes the application name 'Dynamics 365 Business Central' and the environment 'Environment: US'. A navigation bar below the header lists various functional areas: 'My Company', 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. A secondary navigation bar includes 'Customers', 'Vendors', 'Items', 'Bank Accounts', 'Chart of Accounts', 'General Ledger Setup', 'Sales & Receivables Setup', and 'More'. The main content area features a 'Get started' section with the text 'Here are a few steps that make you ready for business' and a 'Skip checklist' link. A 'Your checklist:' panel is open, showing a list of tasks: '1. Sales Orders' (selected), '2. Sales Invoices', '3. Sales Return Orders', and '4. Microsoft Learn'. To the right of the list is a detailed view for '1. Sales Orders' with the title 'Manage orders, fulfillment, and invoicing', a description, and a '15 minutes' duration. Below this view are 'Start' and 'Skip for now' buttons. At the bottom, an 'Activities' section displays four key performance indicators: 'Sales This Month', 'Overdue Sales Invoice Amount', 'Overdue Purch. Invoice Amount', and 'Sales Invoices Predicted Overdue', each with a corresponding gauge chart.

Get started

Here are a few steps that make you ready for business

Skip checklist

Your checklist:

1. Sales Orders
2. Sales Invoices
3. Sales Return Orders
4. Microsoft Learn

Manage orders, fulfillment, and invoicing

Sales orders track what is ordered, what is shipped, and what is invoiced, all in a way that is connected to your inventory.

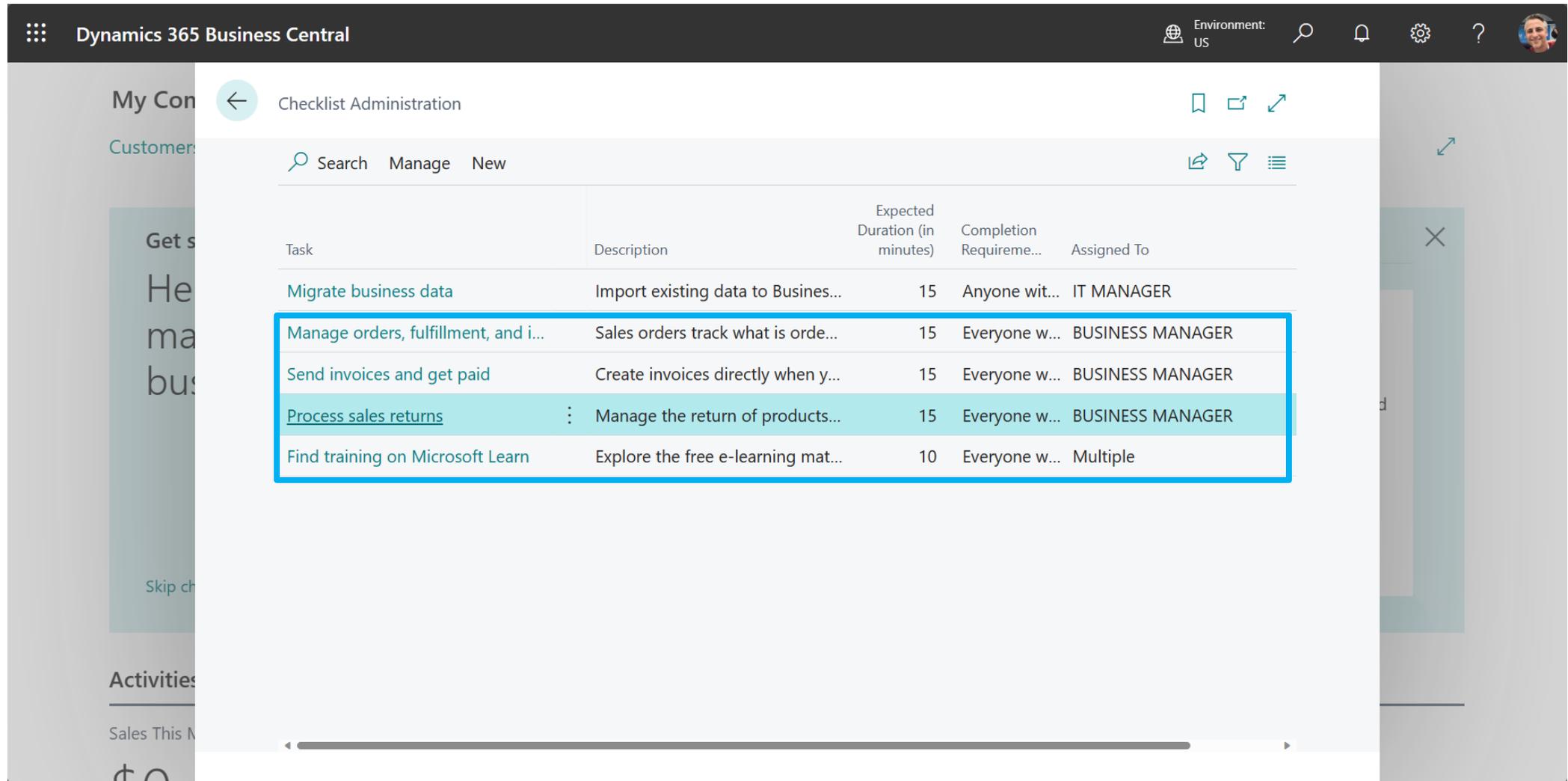
🕒 15 minutes

Start Skip for now

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue

#24: Define checklists for users and roles



The screenshot displays the Dynamics 365 Business Central interface for Checklist Administration. The top navigation bar shows the application name and environment (US). The main content area features a table with columns for Task, Description, Expected Duration (in minutes), Completion Requirements, and Assigned To. A blue box highlights the row for 'Process sales returns'.

Task	Description	Expected Duration (in minutes)	Completion Requirements	Assigned To
Migrate business data	Import existing data to Busines...	15	Anyone wit...	IT MANAGER
Manage orders, fulfillment, and i...	Sales orders track what is orde...	15	Everyone w...	BUSINESS MANAGER
Send invoices and get paid	Create invoices directly when y...	15	Everyone w...	BUSINESS MANAGER
<u>Process sales returns</u>	Manage the return of products...	15	Everyone w...	BUSINESS MANAGER
Find training on Microsoft Learn	Explore the free e-learning mat...	10	Everyone w...	Multiple



Tip # 25

#25: Troubleshoot the Business Central online service connectivity

Navigate to:

<https://businesscentral.dynamics.com/connectivity>

Or to:

<https://aka.ms/bccp>

(short for Business Central Client Performance)

#25: Troubleshoot Business Central online connectivity

Troubleshoot connectivity

This page is intended to help troubleshoot issues with your connection to the Dynamics 365 Business Central online service.

Check started at 04/04/2024, 9:52 am Coordinated Universal Time

- ✔ Business Central resources in Azure Content Delivery Network (CDN)
- ✔ User authentication
- ✔ Business Central environments discovery
- ✔ Application service connectivity
- ✔ Web server connectivity
- ✔ Service health status

All done. No issues detected.

[Restart the check](#)

[Learn more](#)

Microsoft Entra tenant ID: aae2ad71-f6d2-45bd-a4f3-00851793cdba
Operation ID: c8a08d765706450d884349c04d66136c
[Legal](#) | [Privacy](#)

[Go to Business Central](#)



Tip # 26

#26: Browse setup across functional areas with the Role Explorer

Contoso Electronics | Dynamics 365 Business Central | Environment: v24

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

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

Insight from last month

Your top customer was **School of Fine Art**, bought for **\$23,102**

○ ● ○ ○ ○ ○

Activities ▾

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$906	\$63,890	\$49,422	0
> See more			

Actions

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice
- > Find entries...
- > New
- > Payments
- > Reports
- Excel Reports

#26: Browse setup across functional areas with the Role Explorer

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes the company logo, 'Dynamics 365 Business Central', and environment information 'LIVE Environment: v24'. A search bar contains 'Find' and a highlighted 'Explore more roles' button. The main content area is titled 'My Business Central Business Manager' and displays a list of functional areas with their respective item counts:

- Home (5)**
 - Customers
 - Vendors
 - Items
 - Bank Accounts
 - Chart of Accounts
- Sales (17)**
 - Customers
 - Items
 - Item Charges
 - Sales Quotes
 - Sales Orders
 - Blanket Sales Orders
 - Sales Invoices
 - Sales Credit Memos
 - Sales Return Orders
 - Reminders
 - Finance Charge Memos
- Finance (17)**
 - General Journals
 - Chart of Accounts
 - G/L Account Categories
 - G/L Budgets
 - Fixed Assets
 - Financial Reporting
 - Sales Budgets
 - Purchase Budgets
 - Sales Analysis Reports
 - Purchase Analysis Reports
 - Inventory Analysis Reports
 - Currencies
 - Employees
 - Dimensions
 - Statistical Accounts
 - Allocation Accounts
 - Posted General Journals
- Cash Management (13)**
 - Cash Flow Forecasts
 - Chart of Cash Flow Accounts
 - Cash Flow Manual Revenues
 - Cash Flow Manual Expenses
 - Cash Receipt Journals
 - Payment Journals
 - Bank Accounts
 - Bank Acc. Statements
 - Payment Recon. Journals
 - Direct Debit Collections
 - Payment Terms
 - Bank Deposits
 - Bank Account Reconciliations
- Shopify (9)**
 - Shops
 - Customers
 - Products

#26: Browse setup across functional areas with the Role Explorer

Contoso Electronics Dynamics 365 Business Central Environment: v24

CRONUS USA, Inc. | All | Reports & Analysis | **Administration** | Find | ...

- Company Hub**
 - > Explore
 - Setup (1)**
 - Environment Links
- Human Resources**
 - > Explore
 - Setup (11)**
 - Human Resources Setup
 - Human Resources Units of Measure
 - Causes of Inactivity
 - Grounds for Termination
 - Unions
 - Employment Contracts
 - Relatives
 - Employee Misc. Articles
 - Confidential
 - Qualifications
 - Employee Statistics Groups
- System Administration**
 - > Explore
 - General (7)**
 - System (4)
 - System Information
 - Extension Management
 - Mobile device activation and app
 - Printer Management
 - Application (7)
 - Online Map Setup
 - Bank Export/Import Setup
 - Cue Setup
 - Assisted Setup
 - Transformation Rules
 - Manual Setup
 - Image Analysis Setup
 - Job Queue (1)
 - Scheduled Tasks
 - Change Log (1)
 - Change Log Setup
 - Reporting (5)
 - Report Layout Selection
- Finance**
 - > Explore
 - General Ledger (2)**
 - Analysis by Dimensions
 - Setup (3)
 - General Ledger Setup
 - Deferral Templates
 - General Journal Templates
 - Cash Management (1)**
 - Setup (5)
 - Cash Flow Setup
 - Cash Flow Report Selections
 - Payment Terms
 - Payment Methods
 - Currencies
 - Cost Accounting (1)**
 - Setup (1)
 - Cost Accounting Setup
 - Receivables (1)**
 - Setup (2)
 - Sales & Receivables Setup
 - Finance Charge Terms

#26: Browse setup across functional areas with the Role Explorer

The screenshot displays the Dynamics 365 Business Central interface for Contoso Electronics. The top navigation bar includes the company name, environment details (LIVE Environment: v24), and various utility icons. The main content area is divided into functional areas: Administration, Find, and a menu icon. A dropdown menu is open over the 'Administration' area, listing categories such as System Administration, General (7), Data (4), Users (3), Workflow (1), Services (9), Microsoft 365 (4), and Copilot (1). The 'Expand all' option is highlighted with a blue border. On the left, the 'Company Hub' is expanded to show sub-areas like Human Resources, Purchasing, and Service. On the right, other functional areas like Finance, Project, and Sales And Marketing are visible.

Contoso Electronics | Dynamics 365 Business Central | LIVE Environment: v24

CRONUS USA, Inc. | All | Reports & Analysis | Administration | Find | ...

Company Hub ▾

Human Resources ▾

Purchasing ▾

Service ▾

System Administration

- Find as you type
- Expand
- Expand all**
- Collapse
- Collapse all

General (7)

Data (4)

Users (3)

Workflow (1)

Services (9)

Microsoft 365 (4)

Copilot (1)

Finance ▾

Project ▾

Sales And Marketing ▾

Manufacturing ▾

Resource ▾

#26: Browse setup across functional areas with the Role Explorer

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the logo for 'Contoso Electronics', the text 'Dynamics 365 Business Central', and a 'LIVE Environment: v24' indicator. Below the header, the breadcrumb trail shows 'CRONUS USA, Inc.' followed by 'All', 'Reports & Analysis', and 'Administration'. A search bar is highlighted with a blue box, containing the text 'inventory' and a close button. To the right of the search bar, it says '8 results' with up and down arrows. The main content area is divided into three columns: 'Company Hub', 'System Administration', and 'Finance'. Each column has a 'Setup' section with a list of items. The 'System Administration' column is the most detailed, listing various setup tasks like 'System Information', 'Extension Management', and 'Printer Management'. The 'Finance' column lists 'General Ledger Setup', 'Cash Flow Setup', and 'Payment Methods'.

CRONUS USA, Inc. | All | Reports & Analysis | Administration | 8 results ^ v | ...

Company Hub
> Explore
Setup (1)
- Environment Links
^

System Administration
> Explore
General (7)
- System (4)
- System Information
- Extension Management
- Mobile device activation and app
- Printer Management
- Application (7)
- Online Map Setup
- Bank Export/Import Setup
- Cue Setup
- Assisted Setup
- Transformation Rules
- Manual Setup
- Image Analysis Setup
- Job Queue (1)
- Scheduled Tasks
- Change Log (1)
- Change Log Setup
- Reporting (5)
- Report Layout Selection
- Report Settings

Finance
> Explore
General Ledger (2)
- Analysis by Dimensions
- Setup (3)
- General Ledger Setup
- Deferral Templates
- General Journal Templates
Cash Management (1)
- Setup (5)
- Cash Flow Setup
- Cash Flow Report Selections
- Payment Terms
- Payment Methods
- Currencies
Cost Accounting (1)
- Setup (1)
- Cost Accounting Setup
Receivables (1)
- Setup (2)
- Sales & Receivables Setup
- Finance Charge Terms

#26: Browse setup across functional areas with the Role Explorer

The screenshot shows the Dynamics 365 Business Central Role Explorer interface. At the top, the header includes the company name 'Contoso Electronics', the application 'Dynamics 365 Business Central', and environment details 'LIVE Environment: v24'. The breadcrumb trail is 'CRONUS USA, Inc. > All > Reports & Analysis > Administration > inventory'. A search bar contains the text 'inventory' and shows '1 of 8' results. The left sidebar shows a tree view with 'Setup (13)' expanded, and 'Inventory Setup' highlighted. The main content area displays a list of search results categorized by functional area: Code Coverage, Feature Management, Data (4), Users (3), and Workflow (5). A callout box with a grey background and black text says 'CTRL+DOWN to browse through search results', pointing to the 'Inventory (1)' result which is highlighted in blue. Other results include FA Setup, FA Classes, FA Subclasses, FA Locations, FA Journal Templates, FA Reclassification Journal Template, Insurance Journal Templates, Inventory Posting Setup, Inventory Setup, Item Charges, Item Categories, Rounding Methods, Analysis Types, Invt. Analysis Column Templates, and Invt. Analysis Line Templates.

Contoso Electronics Dynamics 365 Business Central Environment: LIVE v24

CRONUS USA, Inc. | All | Reports & Analysis | Administration | inventory 1 of 8

> Explore
Setup (13)
- Purchases & Payables Setup
- Standard Purchase Codes
- Purchasing Codes
- Shipment Methods
- Return Reasons
- Report Selections Purchase
- Requisition Worksheet Templates
- Units of Measure
- Nonstock Item Setup
- Item Discount Groups
- Item Tracking Codes
- **Inventory** Setup
- Purchase Analysis (3)
- Analysis Types
- Purch. Analysis Column Templates
- Purch. Analysis Line Templates

- Code Coverage
- Feature Management
Data (4)
- Reference Data (5)
- Company Information
- No. Series
- ZIP Codes
- Languages
- Countries/Regions
- Data Management (2)
- Data Classification Worksheet
- Privacy for App Integrations
- Data Migration (2)
- Data Migration Overview
- Data Migration Settings
- Data Exchange (1)
- Data Exchange Types
Users (3)
- Users
- User Setup
- User Settings
Workflow (5)

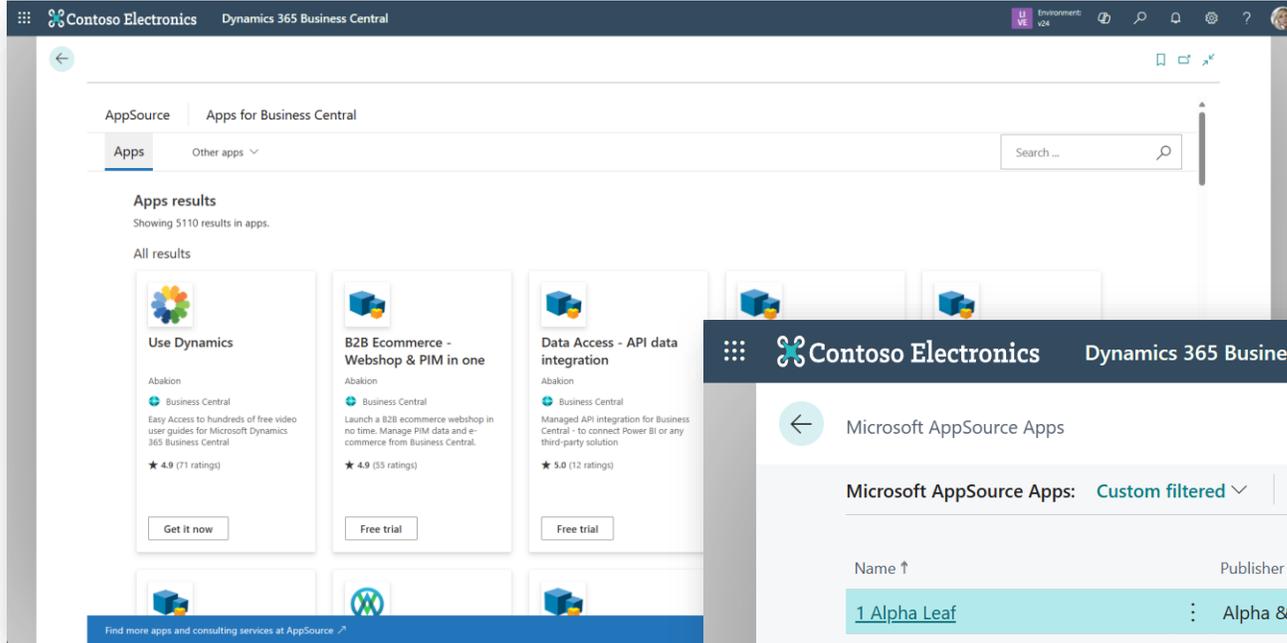
- FA Setup
- FA Classes
- FA Subclasses
- FA Locations
- FA Journal Templates
- FA Reclassification Journal Template
- Insurance Journal Templates
Inventory (1)
- Setup (8)
- **Inventory** Posting Setup
- **Inventory** Setup
- Item Charges
- Item Categories
- Rounding Methods
- Analysis Types
- Invt. Analysis Column Templates
- Invt. Analysis Line Templates
Setup (11)
- General Posting Setup

CTRL+DOWN to browse through search results



Tip # 27

#27: Find apps on Microsoft AppSource



Extension Marketplace is being deprecated



This screenshot shows the 'Microsoft AppSource Apps' list in Dynamics 365 Business Central. The list is filtered to 'Custom filtered' and displays a table of apps with columns for Name, Publisher Name, Installation status, Popularity, Average Rating, No. Of Ratings, and Last Modified Date.

Name ↑	Publisher Name ↑	Instal...	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solutio...	<input type="checkbox"/>	7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	4/5/2024 12:03 AM
1Staff 365 Front Office Integration	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:39 AM
1Staff 365 Timesheet Import	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:40 AM
24/7 TimeTracker	David Boehm, CPA and Company I...	<input type="checkbox"/>	7.73	5.00	2	9/3/2023 1:08 PM
360 Canadian EFT	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	3	12/8/2023 6:35 PM
360 Canadian PAD	360 Visibility Inc.	<input type="checkbox"/>	7.73	0.00	0	12/13/2023 11:01 P...
360 Quick Sign	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	1	12/12/2023 4:45 PM
365 business Address Validation	365 business development	<input type="checkbox"/>	7.73	5.00	1	2/26/2024 9:08 PM
365 business API	365 business development	<input type="checkbox"/>	7.73	5.00	2	3/13/2024 9:29 PM
365 business Barcode	365 business development	<input type="checkbox"/>	7.73	0.00	0	1/8/2024 8:21 PM
365 business PDF	365 business development	<input type="checkbox"/>	7.73	4.50	2	4/2/2024 3:25 PM

Replaced by Microsoft AppSource Apps

#27: Find apps on Microsoft AppSource

List supports normal Business Central filtering

The screenshot displays the Microsoft AppSource interface within the Dynamics 365 Business Central environment. The header shows 'Contoso Electronics' and 'Dynamics 365 Business Central'. The environment is identified as 'LI VE v24'. The main content area is titled 'Microsoft AppSource Apps' and is currently in a 'Custom filtered' state. A list of apps is shown with columns for Name, Publisher Name, Inst..., Popularity, and Average Rating. The first app, 'Bankfeed - bank statement impo...', is highlighted. A filter is applied to the Name column with the value '*bank*'. The interface includes navigation options like 'View AppSource' and 'View in AppSource', and a filter list section with a 'Reset filters' button.

Name ↑ ▼	Publisher Name ↑	Inst...	Popularity	Average Rating
Bankfeed - bank statement impo...	Softera Baltic	<input type="checkbox"/>	7.73	5.00
Citibank API Integration	On Point Ltd.	<input type="checkbox"/>	7.73	0.00

#27: Find apps on Microsoft AppSource

Filtered to apps that works on *this* environment localization

The screenshot shows the Microsoft AppSource interface within the Dynamics 365 Business Central environment. The header includes the Contoso Electronics logo, the environment name 'Dynamics 365 Business Central', and a 'LIVE Environment: v24' indicator. The main content area displays a list of apps under the heading 'Microsoft AppSource Apps: Custom filtered'. The list is sorted by Name and includes columns for Name, Publisher Name, Installation status, Popularity, Average Rating, No. Of Ratings, and Last Modified Date. The first app, 'Alpha Leaf', is highlighted in blue.

Name ↑	Publisher Name ↑	Instal...	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solutio...	<input type="checkbox"/>	7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	4/5/2024 12:03 AM
1Staff 365 Front Office Integration	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:39 AM
1Staff 365 Timesheet Import	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:40 AM
24/7 TimeTracker	David Boehm, CPA and Company I...	<input type="checkbox"/>	7.73	5.00	2	9/3/2023 1:08 PM
360 Canadian EFT	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	3	12/8/2023 6:35 PM
360 Canadian PAD	360 Visibility Inc.	<input type="checkbox"/>	7.73	0.00	0	12/13/2023 11:01 P...
360 Quick Sign	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	1	12/12/2023 4:45 PM
365 business Address Validation	365 business development	<input type="checkbox"/>	7.73	5.00	1	2/26/2024 9:08 PM
365 business API	365 business development	<input type="checkbox"/>	7.73	5.00	2	3/13/2024 9:29 PM
365 business Barcode	365 business development	<input type="checkbox"/>	7.73	0.00	0	1/8/2024 8:21 PM
365 business PDF	365 business development	<input type="checkbox"/>	7.73	4.50	2	4/2/2024 3:25 PM

#27: Find apps on Microsoft AppSource

Use Copilot -> Analyze list to search for apps

Contoso Electronics Dynamics 365 Business Central

Environment: v24

Microsoft AppSource Apps: Custom filtered

Name ↑	Publisher Name ↑	Instal...	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solutio...	<input type="checkbox"/>	7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	4/5/2024 12:03 AM
1Staff 365 Front Office Integration	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:39 AM
1Staff 365 Timesheet Import	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:40 AM
24/7 TimeTracker	David Boehm, CPA and Company I...	<input type="checkbox"/>	7.73	5.00	2	9/3/2023 1:08 PM
360 Canadian EFT	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	3	12/8/2023 6:35 PM
360 Canadian PAD	360 Visibility Inc.	<input type="checkbox"/>	7.73	0.00	0	12/13/2023 11:01 P...
360 Quick Sign	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	1	12/12/2023 4:45 PM
365 business Address Validation	365 business development	<input type="checkbox"/>	7.73	5.00	1	2/26/2024 9:08 PM
365 business API	365 business development	<input type="checkbox"/>	7.73	5.00	2	3/13/2024 9:29 PM
365 business Barcode	365 business developr	<input type="checkbox"/>	7.73	0.00	0	1/8/2024 8:21 PM
365 business PDF	365 business developme	<input type="checkbox"/>	7.73	4.50	2	4/2/2024 3:25 PM

Analyze list

#27: Find apps on Microsoft AppSource

The screenshot displays the Microsoft AppSource Apps page in Dynamics 365 Business Central. The page header includes the organization name 'Contoso Electronics' and the environment 'V25 DK Denmark'. The main content area shows a table of apps with columns for Name, Publisher Name, Installed status, Popularity, Average Rating, No. Of Ratings, and Last Modified Date Time. A modal window titled 'Analyze Microsoft AppSource Apps' is overlaid on the table, containing a search input field with the text 'show me all "bank" apps with ratings' and a 'Generate' button.

Name ↑	Publisher Name ↑	Installed	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solutions, LLC	<input type="checkbox"/>	7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North America	<input type="checkbox"/>	1.00	0.00	0	9/25/2024 5:24 PM
1Staff 365 Front Office Integration	Professional Advantage North America	<input type="checkbox"/>	1.00	0.00	0	5/31/2024 6:37 AM
1Staff 365 Payroll NOW Integration	Professional Advantage North America	<input type="checkbox"/>	1.00	0.00	0	9/27/2024 4:40 AM
1Staff 365 Timesheet Import					0	8/2/2024 6:18 AM
1Vision IoT					0	9/3/2024 5:58 PM
24/7 TimeTracker					2	9/4/2024 2:39 PM
2Notify					2	10/1/2024 10:17 AM
360 Canadian EFT					3	9/4/2024 11:07 PM
360 Canadian PAD					0	9/2/2024 9:40 AM
360 Quick Sign					1	5/17/2024 7:58 PM
365 business Address Validation	365 business development	<input type="checkbox"/>	1.00	5.00	1	8/2/2024 10:17 AM
365 business API	365 business development	<input type="checkbox"/>	1.00	5.00	2	9/4/2024 5:50 PM
365 business Barcode	365 business development	<input type="checkbox"/>	1.00	0.00	0	9/10/2024 11:02 AM
365 business PDF	365 business development	<input type="checkbox"/>	1.00	4.50	2	9/19/2024 7:24 PM
365 business Print Agent	365 business development	<input type="checkbox"/>	1.00	0.00	0	10/4/2024 2:59 PM
365 business Proxy Application	365 business development	<input type="checkbox"/>	1.00	0.00	0	9/19/2024 7:17 PM
365 Cannabis Cultivation	365Vertical	<input type="checkbox"/>	1.00	0.00	0	10/7/2024 12:22 PM
365 Cannabis Processing and Distribution	365Vertical	<input type="checkbox"/>	1.00	0.00	0	10/7/2024 10:29 AM

#27: Find apps on Microsoft AppSource

Contoso Electronics Dynamics 365 Business Central

Environment: v24

Microsoft AppSource Apps: Custom filtered

View AppSource View in AppSource

Name ↑	Publisher Name ↑	Instal...	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solution...	<input type="checkbox"/>	7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	4/5/2024 12:03 AM
1Staff 365 Front Office Integration	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:39 AM
1Staff 365 Time Tracking	Professional Advantage North Am...	<input type="checkbox"/>	7.73	0.00	0	3/22/2024 6:40 AM
24/7 TimeTr						1:08 PM
360 Canadian EFT	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	3	12/8/2023 6:35 PM
360 Canadian PAD	360 Visibility Inc.	<input type="checkbox"/>	7.73	0.00	0	12/13/2023 11:01 PM
360 Quick Sign	360 Visibility Inc.	<input type="checkbox"/>	7.73	5.00	1	12/12/2023 4:45 PM
365 business Address Validation	365 business development	<input type="checkbox"/>	7.73	5.00	1	2/26/2024 9:08 PM
365 business API	365 business development	<input type="checkbox"/>	7.73	5.00	2	3/13/2024 9:29 PM
365 business Barcode	365 business development	<input type="checkbox"/>	7.73	0.00	0	1/8/2024 8:21 PM
365 business PDF	365 business development	<input type="checkbox"/>	7.73	4.50	2	4/2/2024 3:25 PM

Preparing the analysis tab

Stop generating ESC

#27: Find apps on Microsoft AppSource

The screenshot displays the Microsoft AppSource Apps list in Dynamics 365 Business Central. The interface includes a header with the organization name 'Contoso Electronics' and environment 'v25 DK Denmark'. The main content area shows a table of apps with columns for Name, Publisher Name, and Average. A filter is applied to show 'Bank apps with ratings'. A right-hand pane allows for column and filter management. A bottom panel shows the analysis description and options to keep or discard the filter.

Name	Publisher Name	Average
AMC Banking 365 Business	AMC Banking	5.00
AMC Banking 365 Fundamentals	Microsoft	3.667
Bankfeed - bank statement import & reconcili...	Softera Baltic	5.00
E-Bank Reconciliation	SimCrest	4.00
Electronic Banking	WebSan Solutions Inc.	5.00
Electronic Banking Base App	IT.integro sp. z o.o.	5.00
Investnet Yodlee Bank Feeds	Microsoft	2.857
Realtime Bank	BCS Itera	5.00
Vendor Bank Approval Workflow	AMJS CONSULTING	5.00
Vendor Bank Approvals	ASQIT Ltd.	5.00
Yavrio Open Banking	Yavrio	5.00
		50.524

Analysis: show me all "bank" apps with ratings Preview AI-generated content may be incorrect Terms of use Learn more

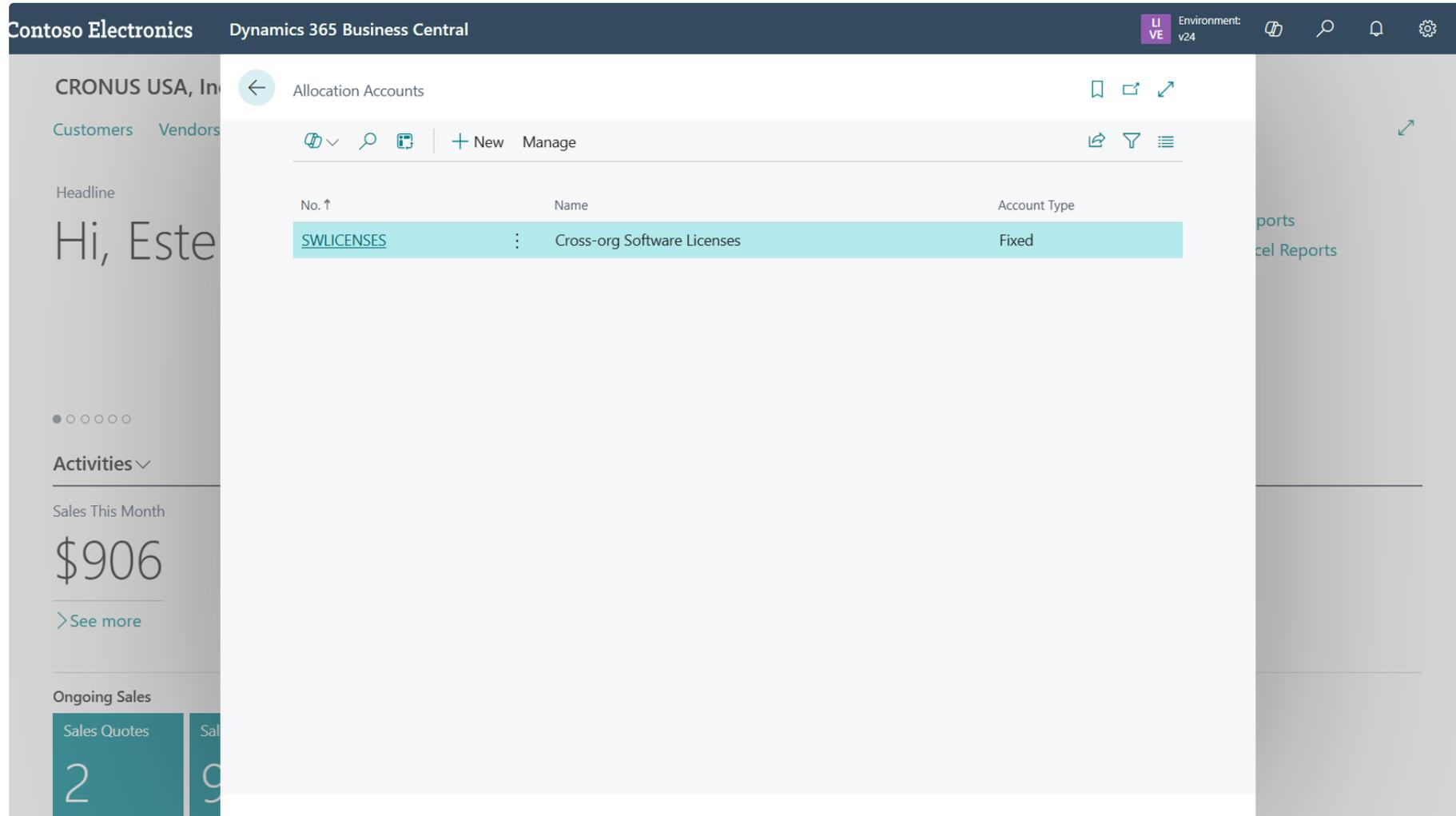
Keep it Discard

Rows: 11 of 3,281 Total Rows: 3,281 Filtered: 11



Tip # 28

#28: Use Allocation Accounts to easily allocate expenses



The screenshot displays the Dynamics 365 Business Central interface for Contoso Electronics. The main content area shows the 'Allocation Accounts' list, which contains one entry: 'SWLICENSES' with the name 'Cross-org Software Licenses' and an account type of 'Fixed'. The interface includes a left-hand navigation pane with options for 'Customers' and 'Vendors', and a right-hand pane with 'Reports' and 'Excel Reports'. The top navigation bar shows the user's environment as 'Environment: v24'.

Contoso Electronics Dynamics 365 Business Central Environment: v24

CRONUS USA, Inc. Allocation Accounts

Customers Vendors

Headline

Hi, Este

● ○ ○ ○ ○ ○

Activities ▾

Sales This Month

\$906

> See more

Ongoing Sales

No. ↑	Name	Account Type
SWLICENSES	Cross-org Software Licenses	Fixed

Sales Quotes Sales

2 9

Reports Excel Reports

#28: Use Allocation Accounts to easily allocate expenses

Contoso Electronics Dynamics 365 Business Central

Environment: v24

Allocation Account

General

No. SWLICENSES Account Type Fixed

Name Cross-org Software Licenses Document Line Split Split Amount

Fixed Account Distribution | New Line | Delete Line | Test Allocation | Dimensions

Destination Account Type	Destination Account Number	Destination Account Name	Share	Percent
→ G/L Account	60300	Licenses, United States	4.00	50%
G/L Account	60301	Licenses, Spain	1.00	13%
G/L Account	60302	Licenses, Germany	1.00	13%
G/L Account	60303	Licenses, Denmark	1.00	13%
G/L Account	60304	Licenses, Sweden	1.00	13%
				0%

#28: Use Allocation Accounts to easily allocate expenses

Contoso Electronics Dynamics 365 Business Central

Environment: v24

General Journals ✓ Saved

Batch Name: DAILY

Manage [Home](#) Request Approval Payroll Line Incoming Document Page Actions Related Automate Fewer options

Post Get Standard Journals... Renumbr Document Numbers Reconcile Apply Entries...

Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Currency Code	Amount	Gen. Posting Type	Gen. Bus. Posting Group
1/18/2024	Payment	12345	Allocation ...	SWLICENSES	Cross-org Software Licenses	BC Licenses		5,000.00		

Number of Lines	Balance	Total Balance
1	0.00	0.00

#28: Use Allocation Accounts to easily allocate expenses

Contoso Electronics Dynamics 365 Business Central

Environment: v24

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

Chart of Accounts: All | 603 | + New | Delete | Edit List | Home | Account | Balance | Navigate | Report | More options

No.	Name	Net Change	Balance	Income/Ba...	Account Category	Account Subcategory	Account Type	Totaling
60300	Licenses, United States	2,500.00	2,500.00	Income Sta...			Posting	
60301	Licenses, Spain	625.00	625.00	Income Sta...			Posting	
60302	Licenses, Germany	625.00	625.00	Income Sta...			Posting	
60303	Licenses, Denmark	625.00	625.00	Income Sta...			Posting	
60304	Licenses, Sweden	625.00	625.00	Income Sta...			Posting	



Tip # 29

#29: User browser tab groups for more efficiency

The screenshot shows a web browser with several tabs open: Customers (LIVE), Items (CPH), Sales Orders (NYC), Payment Journals (HAM), and Extend general ledger posting. The URL is <https://businesscentral.dynamics.com/aae2ad71-f6d2-45bd-a4f3-00851793cdba/v24?company=CRONUS%20USA%2C%20Inc.&node=0000233e-438d-0000-0c28-4f00836bd2d2&page=22&dc=...>

The page header shows "Contoso Electronics Dynamics 365 Business Central" and "Environment: v24". The main navigation bar includes "CRONUS USA, Inc." and various functional areas: Finance, Cash Management, Sales, Purchasing, and Shopify. The "Sales" menu is currently selected.

The "Customers" section is active, showing a list of customers. The table below summarizes the visible data:

Customer ID	Customer Name	Contact Name	Balance
10000	Adatum Corporation	Robert Townes	-1,060.85
20000	Trey Research	Helen Ray	3,036.60
30000	School of Fine Art	Meagan Bond	53,833.52
40000	Alpine Ski House	Ian Deberry	4,316.92
50000	Relecloud	Jesse Homer	8,836.80

The right-hand pane shows "Attachments (0)", "Links +", and "Notes +", all of which are currently empty.



Tip # 30

#30: Automatically suggest balancing amount in journals

ynamics 365 Business Central

Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage **Home** Request Approval Payroll Line Incoming Document Page More options

Post Get Standard Journals... Renumber Document Numbers Reconcile Apply Entries...

Posting Date	Account Type	Account No.	Account Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Amount	Amount (\$)	Bal. Account Type	Bal. Account No.
10/04/2023	G/L Account	11100	Development Expenditure	Development Expenditure	Purchase	DOMESTIC	100.00	100.00	Bank Acct	CHECKING

Number of Lines: 1 Balance: 0.00 Total Balance: 0.00

#30: Automatically suggest balancing amount in journals

Microsoft Dynamics 365 Business Central

Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage Home Request Approval Payroll Line Incoming Document Page More options

Delete

Posting Date	Description	Currency Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Tax Liabile	Tax Area Code	Tax Group Code	Amount
10/04/2023	Development Expenditure		Purchase	DOMESTIC		<input type="checkbox"/>		NONTAXABLE	100.00
→ 10/04/2023	World Wide Bank					<input type="checkbox"/>		▼	0.00

Number of Lines: 2

Balance: 100.00

Total Balance: 100.00

#30: Automatically suggest balancing amount in journals

dynamics 365 Business Central SUM MIT Environment: Production

General Journals ✓ Saved

Batch Name:

Analyze Manage Home Request Approval Payroll Line Incoming Document Page More options

Posting Date	Currency Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Tax Liabile	Tax Area Code	Tax Group Code	Amount	Amount (\$)	Bal. Account Type
10/04/2023		Purchase	DOMESTIC		<input type="checkbox"/>		NONTAXABLE	100.00	100.00	G/L Account
→ 10/04/2023					<input type="checkbox"/>			-100.00	<input type="text" value="-100.00"/>	G/L Account

Number of Lines	Balance	Total Balance
2	0.00	<input type="text" value="0.00"/>

#30: Automatically suggest balancing amount in journals

ynamics 365 Business Central

Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage **Home** Request Approval Payroll Line Incoming Document Page More options

Post Get Standard Journals... Renumber Document Numbers Reconcile Apply Entries...

Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Amount	Amount (\$)
10/04/2023	Invoice	00001	G/L Account	11100	Development Expenditure	Development Expenditure	Purchase	DOMESTIC	100.00	100.00

Number of Lines	Balance	Total Balance
1	100.00	100.00

#30: Automatically suggest balancing amount in journals

Dynamics 365 Business Central

Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage Home

Post Get Standard

Posting Date: 10/04/2023 Document Type: Invoice

General Journal Batches

Search + New Edit List

Name ↑	Bal. Account No.	No. Series	Posting No. Series	Reason Code	Copy Tax Setup to Jnl. Lines	Allow Tax Diff...	Sug... Bala... Am...	Copy to Post... Jnl. Lines
→ DEFAULT					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
MONTHLY	18200	GJNL-GEN			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Amount Amount (\$)

100.00	100.00
--------	--------

Number of Lines Balance Total Balance

1	100.00	100.00
---	--------	--------

OK Cancel

#30: Automatically suggest balancing amount in journals

Dynamics 365 Business Central Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage Home

Post Get Standard

Posting Date: 10/04/2023 Document Type: Invoice

Amount: 100.00 Amount (\$): 100.00

Number of Lines: 1 Balance: 100.00 Total Balance: 100.00

General Journal Batches

Name ↑	Bal. Account No.	No. Series	Posting No. Series	Reason Code	Copy Tax Setup to Jnl. Lines	Allow Tax Diff...	Sug... Bala... Am...	Copy to Post... Jnl. Lines
→ DEFAULT					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
MONTHLY	18200	GJNL-GEN			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

OK Cancel

#30: Automatically suggest balancing amount in journals

ynamics 365 Business Central

Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage Home Request Approval Payroll Line Incoming Document Page More options

Post Get Standard Journals... Renumber Document Numbers Reconcile Apply Entries...

Posting Date	Document No.	Account Type	Account No.	Account Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Amount	Amount (\$)	Bal. Account Type
10/04/2023	00001	G/L Account	11100	Development Expenditure	Development Expenditure	Purchase	DOMESTIC	100.00	100.00	G/L Account
10/04/2023	00001	Bank Acco...	SAVINGS	World Wide Bank	World Wide Bank			-100.00	-100.00	G/L Account

Amount is auto-suggested equal to remaining balance on the same *Document No.*

Number of Lines	Balance	Total Balance
2	0.00	0.00

#30: Automatically suggest balancing amount in journals

ynamics 365 Business Central

Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage **Home** Request Approval Payroll Line Incoming Document Page More options

Post Get Standard Journals... Renumber Document Numbers Reconcile Apply Entries...

Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Amount	Amount (\$)
10/04/2023	Invoice	00001	G/L Account	11100	Development Expenditure	Development Expenditure	Purchase	DOMESTIC	100.00	100.00
10/04/2023	Invoice	00001	Bank Acco...	SAVINGS	World Wide Bank	World Wide Bank			-50.00	-50.00
10/04/2023	Invoice	00002	Bank Acco...	CHECKING	World Wide Bank	World Wide Bank			100.00	100.00

Number of Lines: 3

Balance: 150.00

Total Balance: 150.00

#30: Automatically suggest balancing amount in journals

ynamics 365 Business Central

Environment: Production

General Journals

Batch Name: DEFAULT

Analyze Manage **Home** Request Approval Payroll Line Incoming Document Page More options

Post Get Standard Journals... Renumber Document Numbers Reconcile Apply Entries...

Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Amount	Amount (\$)
10/04/2023	Invoice	00001	G/L Account	11100	Development Expenditure	Development Expenditure	Purchase	DOMESTIC	100.00	100.00
10/04/2023	Invoice	00001	Bank Acco...	SAVINGS	World Wide Bank	World Wide Bank			-50.00	-50.00
10/04/2023	Invoice	00002	Bank Acco...	CHECKING	World Wide Bank	World Wide Bank			100.00	100.00
10/04/2023	Invoice	00002	G/L Account	12110	Building	Building			-100.00	-100.00

Number of Lines	Balance	Total Balance
4	50.00	50.00



Tip # 31

#31: Governing deferred revenue & expenses

Dynamics 365 Business Central

Environment: US

General Ledger Setup

Home | Posting | General | Tax | Bank | Journal Templates | Automate | Fewer options

General

Show less

Allow Posting From	5/1/2023	Local Currency Descri...	US dollar
Allow Posting To	5/31/2023	Pmt. Disc. Excl. Tax	<input type="checkbox"/>
Allow Deferral Postin...	5/1/2023	Adjust for Payment Di...	<input checked="" type="checkbox"/>
Allow Deferral Postin...	5/31/2023	Unrealized Tax	<input type="checkbox"/>
Register Time	<input type="checkbox"/>	Prepayment Unrealiz...	<input type="checkbox"/>
Local Address Format	City+State+ZIP Code	Max. Tax Difference A...	10.00
Local Cont. Addr. For...	After Company Name	Tax Rounding Type	Nearest
Require Country/Regi...	<input checked="" type="checkbox"/>	Bank Account Nos.	BANK
Inv. Rounding Precisi...	0.01	Bank Rec. Adj. Doc. N...	
Inv. Rounding Type (\$)	Nearest	Deposit Nos.	

#31: Governing deferred revenue & expenses

Dynamics 365 Business Central

Environment: US

CRONUS USA, Inc.

Customers Vendors

Get started

Here a
can try

The Cronus com
evaluation, and

Activities

Sales This Month

\$15,275

> See more

User Setup

✓ Saved

Search + New Edit List Delete

User ID ↑	Allow Posting From	Allow Posting To	Allow Deferral Posting From	Allow Deferral Posting To	Sales Invoice Posting Policy	Purch. Invoice Posting Policy	Regi... Time	Salespers./Pu.. Code
→ SOREN	4/1/2023	5/31/2023	4/1/2023	12/31/2023	Allowed	Allowed	<input type="checkbox"/>	

arn

Business
by browser

ect to other Microsoft services

#31: Governing deferred revenue & expenses

Dynamics 365 Business Central

Environment: US

Deferral Template Card

General

Deferral Code 6MONTHS

Deferral Account 20400

Description

Deferral Schedule

Deferral % 100

No. of Periods 6

Calc. Method Straight-Line

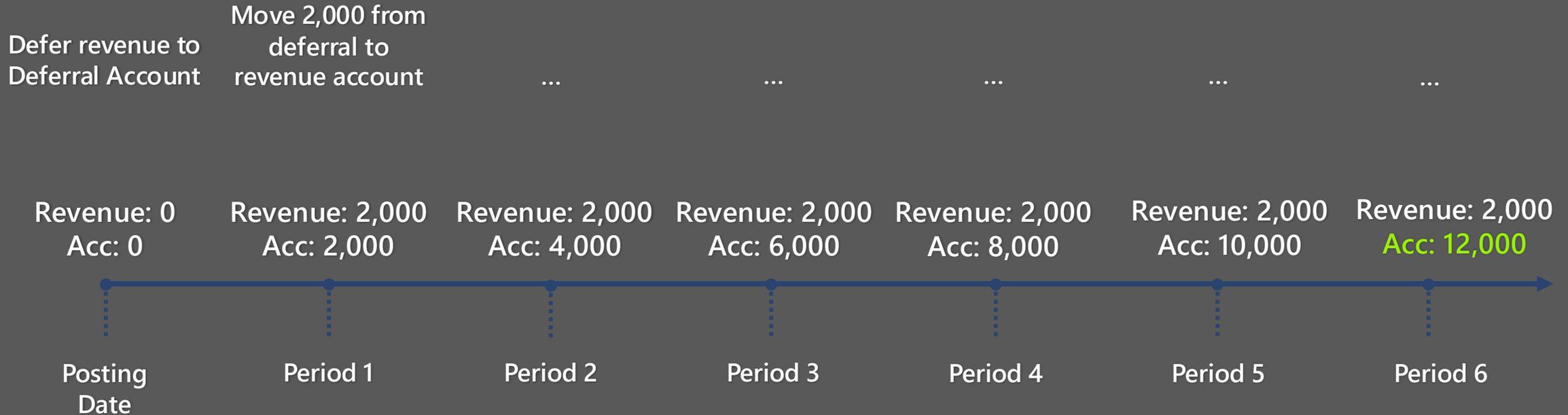
Period Desc. Months

Start Date Posting Date

Deferring revenue example

Invoice service delivery of **12,000**

Service is being delivered in a 6-month period





Tip # 32

#32: Restricting deletion of G&L accounts

The screenshot shows the Dynamics 365 Business Central interface for the 'General Ledger Setup' page. The page title is 'General Ledger Setup' and it includes a navigation bar with 'Home', 'Posting', 'General', 'Tax', 'Bank', and 'Journal Templates'. The 'General' tab is active. The page is divided into two columns of settings. The left column contains settings for 'Amount Rounding', 'Amount Decimal Plac...', 'Unit-Amount Roundi...', 'Unit-Amount Decimal...', 'Check G/L Acc. Deleti...', 'Block Deletion of G/L ...', 'Check G/L Account U...', 'Mark Cr. Memos as C...', 'LCY Code', and 'Local Currency Symbol'. The right column contains settings for 'Print tax specification...', 'VAT in Use', 'Show Amounts', 'Hide Payment Metho...', 'Posting Preview Type', 'SEPA Non-Euro Export', 'SEPA Export w/o Ban...', and 'Enable Data Check'. A blue rectangular box highlights the 'Check G/L Acc. Deleti...' field (set to 5/10/2023) and the 'Block Deletion of G/L ...' toggle (which is turned on). The 'Check G/L Account U...' toggle is also turned on. The top of the page shows the Dynamics 365 Business Central logo, the environment 'US', and various utility icons. The bottom of the page shows the 'Dimensions' section with a 'Show more' link.

General Ledger Setup

Home | Posting | **General** | Tax | Bank | Journal Templates | Automate | Fewer options

Amount Rounding Pl... : 0.01

Amount Decimal Plac... : 2:2

Unit-Amount Roundi... : 0.001

Unit-Amount Decimal... : 2:5

Check G/L Acc. Deleti... : 5/10/2023

Block Deletion of G/L ... :

Check G/L Account U... :

Mark Cr. Memos as C... :

LCY Code : USD

Local Currency Symbol : \$

Print tax specification... :

VAT in Use :

Show Amounts : Amount Only

Hide Payment Metho... :

Posting Preview Type : Standard

SEPA Non-Euro Export :

SEPA Export w/o Ban... :

Enable Data Check :

Dimensions [Show more](#)

How the G/L account deletion rules work

- If Balance \neq 0 an account **cannot** be deleted
- If no other restriction is set an account **can be deleted** if Balance = 0
- Restrict deletion by transaction "freshness"
 - ✓ Use "Block Deletion of "G/L Accounts"" & "Check G/L Acc. Deletion After""
- Restrict deletion if account is used in setup tables
 - ✓ Use "Check G/L Account Usage""

Restrict deletion of data for last 5 years

- Set "Check G/L Acc. Deletion After" to:
The date before which it is okay to delete transactions
- Example: All transactions back to and including 2019 must be kept.
- Set Check G/L Acc. Deletion After" to December 31st 2018





Tip # 33

#33: Determining how Credit Memos are posted

The screenshot shows the Dynamics 365 Business Central interface for the 'General Ledger Setup' page. The page title is 'General Ledger Setup' and it includes a navigation bar with tabs for 'Home', 'Posting', 'General', 'Tax', 'Bank', and 'Journal Templates'. The 'General' tab is selected. The page is divided into two columns of settings. The left column contains settings for 'Unit-Amount Roundi...', 'Unit-Amount Decimal...', 'Check G/L Acc. Deleti...', 'Block Deletion of G/L ...', 'Check G/L Account U...', 'Mark Cr. Memos as C...', 'LCY Code', and 'Local Currency Symbol'. The right column contains settings for 'VAT in Use', 'Show Amounts', 'Hide Payment Metho...', 'Posting Preview Type', 'SEPA Non-Euro Export', 'SEPA Export w/o Ban...', and 'Enable Data Check'. The 'Mark Cr. Memos as C...' toggle is highlighted with a blue box. Below the main settings is a 'Dimensions' section with two global dimensions: 'Global Dimension 1 C...' set to 'DEPARTMENT' and 'Global Dimension 2 C...' set to 'CUSTOMERGROUP'. The top navigation bar shows 'Dynamics 365 Business Central' and 'Environment: US'. The left sidebar shows a navigation pane with 'CRONU' and 'Customer' visible. The right sidebar shows a search bar and a user profile picture.

Dynamics 365 Business Central

Environment: US

General Ledger Setup

Home Posting General Tax Bank Journal Templates Automate Fewer options

Unit-Amount Roundi... 0.001

Unit-Amount Decimal... 2:5

Check G/L Acc. Deleti...

Block Deletion of G/L ...

Check G/L Account U...

Mark Cr. Memos as C...

LCY Code USD

Local Currency Symbol \$

VAT in Use

Show Amounts Amount Only

Hide Payment Metho...

Posting Preview Type Standard

SEPA Non-Euro Export

SEPA Export w/o Ban...

Enable Data Check

Dimensions Show more

Global Dimension 1 C... DEPARTMENT

Global Dimension 2 C... CUSTOMERGROUP

Why determine how Credit Memos are posted?

“Mark Cr. Memo as Correction”
disabled

	Debit	Credit
Invoice	1,000	
		1,000 Cr. Memo

Customer account

“Mark Cr. Memo as Correction”
enabled

	Debit	Credit
Invoice	1,000	
Cr. Memo	-1,000	

Customer account

Some countries have this regulatory requirement



Tip # 34

#34: Setting the local currency

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the Dynamics 365 Business Central logo, the environment name 'Environment: US', and navigation icons for search, notifications, settings, and help. The main content area is titled 'General Ledger Setup' and features a navigation bar with tabs for 'Home', 'Posting', 'General', 'Tax', 'Bank', and 'Journal Templates'. The 'General' tab is active, displaying various configuration options. A blue box highlights the 'LCY Code' field, which is set to 'USD', and the 'Local Currency Symbol' field, which is set to '\$'. Other visible settings include 'Unit-Amount Rounding' (0.001), 'Unit-Amount Decimal' (2:5), 'Check G/L Acc. Deletion' (calendar icon), 'Block Deletion of G/L' (toggle on), 'Check G/L Account U...' (toggle off), 'Mark Cr. Memos as C...' (toggle on), 'VAT in Use' (toggle off), 'Show Amounts' (Debit/Credit Only), 'Hide Payment Metho...' (toggle off), 'Posting Preview Type' (Standard), 'SEPA Non-Euro Export' (toggle off), 'SEPA Export w/o Ban...' (toggle off), and 'Enable Data Check' (toggle off). At the bottom, the 'Dimensions' section shows 'Global Dimension 1 C...' set to 'DEPARTMENT' and 'Global Dimension 2 C...' set to 'CUSTOMERGROUP'. The left sidebar shows a navigation pane with 'CRONU' and 'Customer' visible, and a 'Get s' section with 'Hi,' and 'You're Go e'. The right sidebar shows a 'Microsoft services' link.

#34: Setting the local currency

Dynamics 365 Business Central

Environment: US

Customer Ledger Entries

Search Edit List Home Entry More options

Show Document Find entries... Create Reminder...
Apply Entries Reverse Transaction... Create Finance Charge Memo...

Posting Date	Customer Name	Description	Department Code	Customergro... Code	Currency Code	Original Amount	Debit A
→ 3/31/2023	Relecloud	Invoice S-INV102197	SALES	MEDIUM		3,081.84	
3/25/2023	Relecloud	Invoice S-INV102192	SALES	MEDIUM		-4,596.16	
3/25/2023	Relecloud	Invoice S-INV102192	SALES	MEDIUM		4,596.16	
3/21/2023	Relecloud	Invoice S-INV102188	SALES	MEDIUM		-403.01	
3/21/2023	Relecloud	Invoice S-INV102188	SALES	MEDIUM		403.01	
2/28/2023	Relecloud	Invoice S-INV102184	SALES	MEDIUM		2,877.48	
2/22/2023	Relecloud	Invoice S-INV102179	SALES	MEDIUM		-4,999.17	
2/22/2023	Relecloud	Invoice S-INV102179	SALES	MEDIUM		4,999.17	
1/31/2023	Relecloud	Invoice S-INV102171	SALES	MEDIUM		2,877.48	
1/25/2023	Relecloud	Invoice S-INV102166	SALES	MEDIUM		-2,757.70	

#34: Setting the local currency

Dynamics 365 Business Central

Environment: US

Currencies

✓ Saved

Search + New Edit List Delete Edit View Home Exchange Rate Service More options

✓ Suggest Accounts Change Payment Tolerance Exch. Rates Adjust Exchange Rate Exchange Rate Adjust. Register

Code ↑	Description	ISO Code	ISO Numeric Code	Symbol	Exchange Rate Date	Exchange Rate	EMU Curr...	Realized Gains Acc.	Realized Losses Acc.	Unreal. Gains A
CAD	Canadian dollar	CAD	124	\$	1/1/2021	0.665604	<input type="checkbox"/>	40500	40500	
EUR	Euro	EUR	978	€	1/1/2021	0.9952	<input checked="" type="checkbox"/>	40500	40500	
MXN	Mexican peso	MXN	484	\$	1/1/2021	0.111114	<input type="checkbox"/>	40500	40500	
→ USD	⋮ United States D...	ISD		\$	-	0	<input type="checkbox"/>			



Tip # 35

#35: Resolve errors as you type

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the logo, 'Dynamics 365 Business Central', and the environment 'US'. The main content area is titled 'General Ledger Setup' and contains various configuration options. A blue box highlights the 'Enable Data Check' toggle switch, which is currently turned on. Other visible settings include 'Block Deletion of G/L ...' (on), 'Mark Cr. Memos as C...' (on), 'LCY Code' (USD), and 'Local Currency Symbol' (\$). Below the main settings, there are sections for 'Dimensions' and 'Background Posting'. The 'Dimensions' section shows 'Global Dimension 1 C...' set to 'DEPARTMENT' and 'Global Dimension 2 C...' set to 'CUSTOMERGROUP'. The 'Background Posting' section is partially visible at the bottom.

Dynamics 365 Business Central

Environment: US

CRONU
Customer
Insight from
The
ATH
un
Get s
Activities
Sales This M
\$1,9

General Ledger Setup

Home Posting General Tax Bank Journal Templates Automate Fewer options

Check G/L Acc. Deleti...
Block Deletion of G/L ...
Check G/L Account U...
Mark Cr. Memos as C...
LCY Code
Local Currency Symbol

Hide Payment Metho...
Posting Preview Type
SEPA Non-Euro Export
SEPA Export w/o Ban...
Enable Data Check

Dimensions

Global Dimension 1 C... DEPARTMENT Global Dimension 2 C... CUSTOMERGROUP

Background Posting

#35: Resolve errors as you type

Dynamics 365 Business Central

Environment: US

General Journals

Batch Name: DEFAULT

Manage: [Home](#) Request Approval Payroll Line Incoming Document Page | Actions Related Automate Fewer options

Post Get Standard Journals... Renumber Document Numbers Reconcile Apply Entries...

Posting Date	Description	Currency Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group
→ 4/10/2023	Saving account				

Journal Check ▾

1	1	1
Lines checked	Lines with issues	Issues Total

Current line

Amount must have a value in Gen. Journal Line: J...

Number of Lines	Balance	Total Balance
1	0.00	0.00

Journal Line Details

Posting Group



Tip # 36

#36: Stay on top of environment lifecycle events (scheduled updates etc.)

The screenshot displays the Dynamics 365 Business Central interface for Contoso Electronics. The top navigation bar includes the company name, environment details (HQ US, Headquarters), and user profile. The main navigation area lists various functional areas like Finance, Sales, and Purchasing. A settings panel is open on the right, with 'Admin Center' highlighted. The dashboard features a large insight card about deal performance and a grid of key metrics.

Contoso Electronics | Dynamics 365 Business Central

Environment: HQ US Headquarters

Settings

Dynamics 365 Business Central

- Personalize
- My Settings
- Company information
- Assisted setup
- Advanced settings
- Admin Center**

Microsoft 365

View all

Insight from last month

You closed 2 more deals than in the same period last year

Activities

Metric	Value
Sales This Month	\$1,001
Overdue Sales Invoice Amount	\$70,024
Overdue Purch. Invoice Amount	\$49,422
Sales Invoice Overdue	0

#36: Stay on top of environment lifecycle events (scheduled updates etc.)

The screenshot shows the Dynamics 365 Business Central admin center interface. The top navigation bar includes the title "Dynamics 365 Business Central admin center" and icons for settings, help, and user profile. The left sidebar contains a menu with items: Environments, Notification Recipients (highlighted), Microsoft Entra Apps, Telemetry, Reported Outages, Operations, and Capacity. The main content area is titled "Notification Recipients" and features a table with columns "Name" and "Email Address". Above the table are buttons for "+ Add recipient" and "Remove recipient". A modal window titled "Add recipient" is open on the right, containing the instruction "Add an email to receive notifications" and two input fields: "Name *" with the value "Søren Alexandersen" and "Email Address *" with the value "soalex@microsoft.com". At the bottom of the modal are "Save" and "Cancel" buttons.

Dynamics 365 Business Central admin center

Environments

Notification Recipients

Microsoft Entra Apps

Telemetry

Reported Outages

Operations

Capacity

+ Add recipient — Remove recipient

Notification Recipients

Name	Email Address
------	---------------

Add recipient

Add an email to receive notifications

Name *

Søren Alexandersen

Email Address *

soalex@microsoft.com

Save Cancel



Tip # 37

#37: Take control of when updates occur

Note the new update rules(!)

The screenshot shows the Dynamics 365 Business Central admin center interface. The top navigation bar includes 'Update Settings' with a dropdown menu. The dropdown menu is open, showing two options: 'Set update window' and 'Set update date', both highlighted with a blue box. The main content area displays the details for the 'SandboxV22' environment.

Environments > SandboxV22

Details				Active ⓘ
Name	Application Family	Country/region	Azure Region	
SandboxV22	Business Central	US	East US	
Type	Application Insights Connection String (?)	Security Group	Access with Microsoft 365 Licenses (?)	
Sandbox	Not Set (Define)	Not Set (Define)	Off (Modify)	
URL				
https://businesscentral.dynamics.com/1b51e3f5-1823-4ecc-b22a-840bc0ac7e8b/SandboxV22				

Version Management			
Application Version	Platform Version	Available Update Version	Update Scheduling Available (?)
22.5.59966.60134	22.0	23.0.12034.12676	Yes
Update will start on or after	Update Window (UTC-06:00) (?)	Update Rollout State (?)	
Nov 05, 2023 (Modify)	09:00 PM - 04:00 AM (Modify)	Postponed	

#37: Take control of when updates occur

Note the new update rules(!)

The screenshot shows the Dynamics 365 Business Central admin center interface. The main content area displays the configuration for the 'SandboxV22' environment. It is divided into two sections: 'Details' and 'Version Management'.

Details:

Name	Application Family	Country/region	Azure Region
SandboxV22	Business Central	US	East US
Type	Application Insights Connection String (?)	Security Group	Access with Microsoft 365 Licen
Sandbox	Not Set (Define)	Not Set (Define)	Off (Modify)
URL https://businesscentral.dynamics.com/1b51e3f5-1823-4ecc-b22a-840bc0ac7e8b/SandboxV22			

Version Management:

Application Version	Platform Version	Available Update Version	Update Scheduling Available (?)
22.5.59966.60134	22.0	23.0.12034.12676	Yes
Update will start on or after Nov 05, 2023 (Modify)	Update Window (UTC-06:00) (?) 09:00 PM - 04:00 AM (Modify)	Update Rollout State (?) Postponed	

Set update window

SandboxV22

The update window is the time of day when updates may be applied to environment. During the update, the environment will not be available. Ideally, the update window should occur outside working hours for the environment. [Learn more](#)

Select the update window start and end times, relative to a specific time zone.

Time zone *

(UTC+01:00) Brussels, Copenhagen, Madrid, Paris

i The current offset from UTC for the selected time zone is +02:00 due to Daylight Saving Time.

Start Time

09:00 PM

End Time

04:00 AM

i If the end time is less than the start time, the update window will end on the following day from the start of the update window.

[Save](#) [Cancel](#)

#37: Take control of when updates occur

Note the new update rules(!)

The screenshot shows the Dynamics 365 Business Central admin center interface. The main content area displays details for the 'SandboxV22' environment. The interface is divided into two main sections: 'Details' and 'Version Management'.

Details:

Name	Application Family	Country/region	Azure Region
SandboxV22	Business Central	US	East US
Type	Application Insights Connection String (?)	Security Group	Access with Microsoft 365 Licen
Sandbox	Not Set (Define)	Not Set (Define)	Off (Modify)
URL https://businesscentral.dynamics.com/1b51e3f5-1823-4ecc-b22a-840bc0ac7e8b/SandboxV22			

Version Management:

Application Version	Platform Version	Available Update Version	Update Scheduling Available (?)
22.5.59966.60134	22.0	23.0.12034.12676	Yes
Update will start on or after	Update Window (UTC-06:00) (?)	Update Rollout State (?)	
Nov 05, 2023 (Modify)	09:00 PM - 04:00 AM (Modify)	Postponed	

Schedule environment update

SandboxV22

Visit [Business Central Updates](#) to find out more about the update roll-c process.

Current Version: 22.5.59966.60134

Current Scheduled Update Date: Not Set

Select a date to schedule the update of this environment. The update w occur within the time frame defined in the update window settings for t environment. Or you can choose to allow the update to run outside the update window.

Select an update version:

Update Date:

The chosen update date applies to your local time zone as detected by the browser. The update window for the environment in your local time is: 05:00 AM - 12:00 PM (UTC+02:00)

Allow the update to run outside the update window

 No

[Schedule update](#) [Cancel](#)



Tip # 38

#38: Easily create an Excel layout for a report

Amics 365 Business Central

Environment: Production

05 October 2023
Page 1
ADMIN

Inventory - Top 10 List
Period:
CRONUS USA, Inc.

Ranked according to largest Sales (LCY)

Rank	No.	Description	Sales (\$)	Inventory	Portion of Sales (LCY)
1	1936-S	BERLIN Guest Chair, yellow	486,028.00	77	*****
2	1896-S	ATHENS Desk	180,144.00	15	*****
3	1996-S	ATLANTA Whiteboard, base	167,676.00	10	*****
4	1920-S	ANTWERP Conference Table	53,880.60	6	****
5	1906-S	ATHENS Mobile Pedestal	45,094.40	5	****
6	1900-S	PARIS Guest Chair, black	23,136.00	0	**
7	1960-S	ROME Guest Chair, green	20,629.60	2	**
8	1972-S	MUNICH Swivel Chair, yellow	20,150.60	0	**
9	1968-S	MEXICO Swivel Chair, black	19,960.50	10	**
10	1965-W	Conference Bundle 2-8	18,937.80	-81	**
Total			1,035,637.50	44	
Total Sales			1124997.5	41	
% of Total Sales			92.10	107.3	

#38: Easily create an Excel layout for a report

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. A search bar is open with the text 'inventory top'. The search results are displayed in a list under the heading 'Go to Reports and Analysis'. The first result is 'Inventory Top 10 List', which is highlighted. To the right of this result, the text 'Reports and Analysis' is visible. Below the search results, there are options to 'Search company data' and 'Search Help'. At the bottom of the search results, there is a message: 'Didn't find what you were looking for? Try exploring pages or exploring reports'. The background of the interface shows a 'Get started' section with the text 'Hi, meet Business Central' and a 'Show demo tours' button. At the bottom of the page, there is an 'Activities' section with a table of financial data.

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$1 906	\$63 890	\$49 422	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. A modal dialog titled 'Inventory Top 10 List' is open, allowing for report configuration. The dialog includes the following settings:

- Printer:** (Handled by the browser)
- Report Layout:** ./InventoryMgt/Reports/InventoryTop10... (with a menu icon)
- Use default values from:** Last used options and filters
- Options:**
 - Show:** Largest
 - Show:** Sales (\$)
 - Quantity:** 10
 - Include Items Not on Inventory ...:** (toggle is off)

At the bottom of the dialog, four buttons are visible: 'Send to...' (highlighted with a blue box), 'Print', 'Preview', and 'Cancel'. The background shows a dashboard with a 'Get started' section and a table of sales data.

Amount	Amount	Overdue	Amount
\$1 906	\$63 890	\$49 422	0

#38: Easily create an Excel layout for a report

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The main report is 'Inventory Top 10 List'. A dialog box titled 'Choose file type...' is open, allowing the user to select the output format. The options are:

- PDF Document
- XML Document
- Microsoft Word Document
- Microsoft Excel Document (data and layout)
- Microsoft Excel Document (data only)
- Schedule...

The 'Microsoft Excel Document (data only)' option is highlighted with a red rectangular box. The dialog box also features 'OK' and 'Cancel' buttons. In the background, a table of data is visible with columns for 'Amount' and 'Overdue', showing values like \$1,906, \$63,890, and \$49,422.

#38: Easily create an Excel layout for a report

The screenshot displays the Microsoft Excel interface with the 'Table Design' ribbon active. The spreadsheet shows a table with the following data:

Item_No	Item_Description	Item_Sales_LCY	Item_Inventory	BarText	Item_Sales_LCY	Control24	ItemSales
1	BERLIN Guest Chair, yellow	486,028.00	77.	*****	486,028.00	0.00	0.00
2	ATHENS Desk	180,144.00	15.	*****	180,144.00	0.00	0.00
3	ATLANTA Whiteboard, base	167,676.00	10.	*****	167,676.00	0.00	0.00
4	ANTWERP Conference Table	53,880.60	6.	*****	53,880.60	0.00	0.00
5	ATHENS Mobile Pedestal	45,094.40	5.	****	45,094.40	0.00	0.00
6	PARIS Guest Chair, black	23,136.00	0.	**	23,136.00	0.00	0.00
7	ROME Guest Chair, green	20,629.60	2.	**	20,629.60	0.00	0.00
8	MUNICH Swivel Chair, yellow	20,150.60	0.	**	20,150.60	0.00	0.00
9	MEXICO Swivel Chair, black	19,960.50	10.	**	19,960.50	0.00	0.00
10	Conference Bundle 2-8	18,937.80	-81.	**	18,937.80	0.00	0.00

At the bottom of the Excel window, the status bar shows: Calculation Mode: Automatic, Workbook Statistics, Average: 103563.75, Count: 20, Sum: 1035637.5, Give Feedback to Microsoft, and 130% zoom.

#38: Easily create an Excel layout for a report



#38: Easily create an Excel layout for a report

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. A search bar is open with the text 'inventory top'. Below the search bar, the results are categorized under 'Go to Reports and Analysis', with 'Inventory Top 10 List' highlighted. Below this, there are search options: 'Search company data' and 'Search Help'. At the bottom of the search results, there is a link: 'Didn't find what you were looking for? Try exploring pages or exploring reports'. The background shows a dashboard with a 'Get started' section and a 'Show demo tours' button. At the bottom, there is an 'Activities' section with a table of financial data.

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$1 906	\$63 890	\$49 422	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for the company 'CRONUS USA, Inc.'. A modal dialog titled 'Inventory Top 10 List' is open, allowing for report configuration. The dialog includes the following fields and options:

- Printer:** (Handled by the browser)
- Report Layout:** ./InventoryMgt/Reports/InventoryTop10... (This field is highlighted with a blue box, and a blue square icon with three dots is visible to its right, indicating a menu for creating or selecting a layout.)
- Use default values from:** Last used options and filters
- Options:**
 - Show:** Largest
 - Show:** Sales (\$)
 - Quantity:** 10
 - Include Items Not on Inventory ...:** (Toggle switch is turned off)

At the bottom of the dialog, there are four buttons: 'Send to...', 'Print', 'Preview', and 'Cancel'. The background shows a 'Get started' banner and a table with financial data.

Amount	Amount	Overdue	Amount
\$1 906	\$63 890	\$49 422	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.' and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. The current report is 'Inventory Top 10 List'. A 'Report Layouts' dialog box is open, showing a table with the following data:

Report ID ↑	Report Name	Layout Name	Description	Def...
→ 711	Inventory Top 10 List	./InventoryMgt/Reports/Invent...	./InventoryMgt/Reports/Invent...	<input checked="" type="checkbox"/>

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. In the background, a summary card for 'Sales This Month' is visible, showing a total of \$1,906. Below it, a table lists 'Amount' values: \$63,890, \$49,422, and 0.

#38: Easily create an Excel layout for a report

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar shows 'CRONUS USA, Inc.' and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. The current report is 'Inventory Top 10 List'. A 'Report Layouts' dialog box is open, displaying a table of report layouts. The 'Manage' menu is open over the table, with 'New' selected. Below the table, there are 'OK' and 'Cancel' buttons. At the bottom of the screen, a summary bar shows 'Sales This Month' with values: \$1,906, \$63,890, \$49,422, and 0.

Report ID ↑	Report Name	Report Description	Default
711	Inventory	InventoryMgt/Reports/Invent...	<input checked="" type="checkbox"/>

Activities

Sales This Month

\$1,906 \$63,890 \$49,422 0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.' and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. A sub-navigation bar shows 'Customers', 'Vendors', and 'Items'. The current report is titled 'Inventory Top 10 List'. A dialog box titled 'Add New Layout for a Report' is open, allowing the user to configure a new layout for the report. The dialog box contains the following fields and options:

- Report ID:** 711
- Report Name:** Inventory Top 10 List
- Layout Name:** Top products (Graphs)
- Description:** Use this report for board meetings
- Format Options:** Excel
- Available in All Companies:**

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. The background shows a partial view of the report's data table, including columns for 'Sales This Month' and 'Amount', with values like \$1,906, \$63,890, and \$49,422.

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Dynamics 365 Business Central" and "Environment: Production". The main navigation bar includes "CRONUS USA, Inc." and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. A sub-navigation bar shows "Customers", "Vendors", and "Items". The current report is titled "Inventory Top 10 List".

A "Report Layouts" dialog box is open, showing a table with columns for "Report ID", "Report", and "Def...". The first row is highlighted, showing "711" for the Report ID and "InventoryMgt/Reports/Invent..." for the Report name. Below the table, there are "OK" and "Cancel" buttons.

A "Choose Excel layout file" dialog box is overlaid on the "Report Layouts" dialog. It features a dashed teal box with the text "Drop a file here to upload, or click here to browse" and an upward-pointing arrow. A purple arrow points from the bottom of this dialog to a file icon labeled "Inventory Top 10 List.xlsx".

At the bottom of the screen, a table displays financial data:

Amount	Amount	Overdue	Amount
\$1 906	\$63 890	\$49 422	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. The main window shows the 'Inventory Top 10 List' report. A 'Report Layouts' dialog box is open, listing available layouts for this report. The dialog box has a table with the following data:

Report ID	Report Name	Layout Name	Description	Def...
711	Inventory Top 10 List	./InventoryMgt/Reports/Invent...	./InventoryMgt/Reports/Invent...	<input checked="" type="checkbox"/>
→ 711	Inventory Top 10 List	Top products (Graphs)	Use this report for board meeti...	<input type="checkbox"/>

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. The background interface shows the 'CRONUS USA, Inc.' header, navigation tabs for 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify', and a 'Send to...' button at the bottom of the report area.

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and the environment 'SUM MIT Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.', 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Shopify', and 'All Reports'. The current report is 'Inventory Top 10 List'. A 'Report Layouts' dialog box is open, showing a table of report layouts. The table has columns for 'Report ID', 'Report Name', and 'Default'. The layout with ID '711' and name 'Inventory products (Graphs)' is selected. A context menu is open over this row, with 'Set Default' highlighted. The dialog box also has 'OK' and 'Cancel' buttons. In the background, a table shows sales data for 'Sales This Month' with values: \$1,906, \$63,890, \$49,422, and 0.

Report ID	Report Name	Default
711	Inventory products (Graphs)	<input type="checkbox"/>

Amount	Amount	Overdue	Amount
\$1,906	\$63,890	\$49,422	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.' and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. The current report is 'Inventory Top 10 List'. A 'Report Layouts' dialog box is open, showing a table of available layouts for this report.

Report ID ↑	Report Name	Layout Name	Description	Def...
711	Inventory Top 10 List	./InventoryMgt/Reports/Invent...	./InventoryMgt/Reports/Invent...	<input type="checkbox"/>
→ 711	Inventory Top 10 List	Top products (Graphs)	Use this report for board meeti...	<input checked="" type="checkbox"/>

At the bottom of the dialog box, there are 'OK' and 'Cancel' buttons. The background report shows a summary of sales for the month, with values like \$1,906 and \$63,890.

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. A modal dialog titled 'Inventory Top 10 List' is open, allowing for report configuration. The 'Report Layout' dropdown is highlighted with a blue box, showing 'Top products (Graphs)' selected. Other settings include 'Printer' set to '(Handled by the browser)', 'Use default values from' set to 'Last used options and filters', 'Show' set to 'Largest', 'Show' set to 'Sales (\$)', 'Quantity' set to 10, and 'Include Items Not on Inventory' set to 'Off'. At the bottom of the dialog are buttons for 'Send to...', 'Download', and 'Cancel'. The background shows a navigation menu with 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify', and a 'Get started' banner with a 'Show demo tours' button.

Inventory Top 10 List

Printer (Handled by the browser) ▾

Report Layout **Top products (Graphs)** ▾

Use default values from Last used options and filters ▾

Options

Show Largest ▾

Show Sales (\$) ▾

Quantity 10

Include Items Not on Inventory ...

Send to... Download Cancel

Activities ▾

Sales This Month

\$1 906 \$63 890 \$49 422 0

#38: Easily create an Excel layout for a report





Tip # 39

#39: Monitor sensitive fields

Contoso Electronics Dynamics 365 Business Central Environment: v25US

Company Information

✕ This page contains sensitive business data. You can set up a notification to alert you when data changes. Enable Field Monitoring | Don't show this again.

Related ▾

General Show more

Name	<input type="text" value="CRONUS USA, Inc."/>	Country/Region Code	<input type="text" value="US"/>
Address	<input type="text" value="7122 South Ashford Street"/>	Contact Name	<input type="text" value="Adam Matteson"/>
Address 2	<input type="text" value="Westminster"/>	Phone No.	<input type="text" value="+1 425 555 0100"/>
City	<input type="text" value="Atlanta"/>	Federal ID No.	<input type="text"/>
State	<input type="text" value="GA"/>	EORI Number	<input type="text"/>
ZIP Code	<input type="text" value="31772"/>	Picture	
SAT ZIP Code	<input type="text"/>		

Communication Show more

Email	<input type="text"/>	EIN Number	<input type="text"/>
Home Page	<input type="text"/>	IRS Contact No.	<input type="text"/>

Payments >

#39: Monitor sensitive fields

The screenshot displays the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main page shows the 'Company Information' form with sections for 'General', 'Communication', 'Payments', and 'Shipping'. A modal dialog box titled 'Field Monitoring Assisted Setup Guide' is open in the center. The dialog has a gear icon in the top left and a close button in the top right. The content includes a 'Welcome' section with the following text:

Monitoring fields helps prevent unwanted changes to sensitive data. When someone changes a value in a monitored field, the change is logged, and a notification can be sent by email to a designated recipient.

For each change, you can view the original and new value, the user who made the change, and the time and date that the change occurred.

Monitoring fields can impact performance. We recommend that you only monitor the fields you think are most important.

At the bottom of the dialog are three buttons: 'Back', 'Next' (highlighted in teal), and 'Finish'.

The background form shows the following data for 'Company Information':

- General:** Name: CRONUS USA, I...; Address: 7122 South Ash...; Address 2: Westminster; City: Atlanta; State: GA; ZIP Code: 31772; SAT ZIP Code: [empty]
- Communication:** Email: [empty]; Home Page: [empty]
- Payments:** [empty]
- Shipping:** [empty]

The top navigation bar includes 'Contoso Electronics', 'Dynamics 365 Business Central', and 'Environment: v25US'. The right side of the bar has icons for search, notifications, settings, and help, along with a user profile picture.

#39: Monitor sensitive fields

The screenshot displays the Dynamics 365 Business Central interface for 'Contoso Electronics'. The background shows the 'Company Information' form with fields for Name, Address, City, State, ZIP Code, and Communication details. A modal dialog box titled 'Field Monitoring Assisted Setup Guide' is centered on the screen. The dialog includes a gear icon, a 'Let's Get Started' section with explanatory text, a link to 'View Data Classification Worksheet', and three toggle switches for 'Sensitive', 'Personal', and 'Company Confidential'. At the bottom of the dialog are 'Back', 'Next', and 'Finish' buttons.

Field Monitoring Assisted Setup Guide

Let's Get Started

If you have specified data sensitivity classifications for fields, you can add the fields based on their classifications.

If you have not classified your fields, you can add fields and manage settings for individual fields on the Monitored Fields Worksheet page.

[View Data Classification Worksheet](#)

Sensitive

Personal

Company Confidential

Back **Next** **Finish**

#39: Monitor sensitive fields

Field Monitoring Assisted Setup Guide

Choose The Change Notification Recipient
Specify the user who will receive an email notification when someone changes a value in a monitored field.

Notification Recipient ADMIN ...

Notification Email Account System User ...

Type : SMTP or Microsoft 365
(not Current user)

Back Next Finish

Assisted Setup

CRONUS USA, Inc.

Customers Vendors

Insight from last month

Your top School \$23,102

Activities

Sales This Month \$1,906

Ongoing Sales

Sales Quotes Sales

2 9

Payments

Start Setup General Videos

Learn

Set up Job Q

Excel Add-in

Configure th

Outlook Add

Teams App C

Power Autom

Access data

Card Setting

Set Up Time

Set up approv

Set up the E

Set up appro

Set up an ap

Set up a cust

Set up an approval workflow to manage pay... Create approval workflows that automatica...

Set Up Extended Security

Set up field monitoring Read You can monitor important fields when so...

#39: Monitor sensitive fields

The screenshot displays the Dynamics 365 Business Central interface. The top navigation bar shows 'Contoso Electronics' and 'Dynamics 365 Business Central'. The main page is titled 'Company Information' for 'CRONUS USA, Inc.'. A dialog box titled 'Field Monitoring Assisted Setup Guide' is open in the center. The dialog contains a green checkmark, the text 'That's it!', and instructions: 'For notifications, you must specify the fields for which to send them. Turn on the View Monitored Fields toggle, and then choose Finish to open the Monitored Fields Worksheet page. Choose Notify for each field.' Below this, it says 'If you just want to start monitoring fields, choose Finish. You will need to restart Business Central.' A toggle switch for 'View Monitored Fields' is shown in the 'On' position. At the bottom of the dialog are three buttons: 'Back', 'Next', and 'Finish'. The background page shows fields for Name, Address, City, State, ZIP Code, and SAT ZIP Code under the 'General' section, and 'Communication' and 'Payments' sections below.

#39: Monitor sensitive fields

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes the logo for 'Contoso Electronics', the text 'Dynamics 365 Business Central', and the environment 'v25US'. The main content area is titled 'Monitored Fields Worksheet' and contains a table of monitored fields. The table has columns for 'Table No.', 'Table Caption', 'Field No. ↑', 'Field Caption', and 'Notify'. A blue box highlights the 'Notify' column, which contains checkmarks for all listed fields. The left sidebar shows the 'Company Info' entity with sections for 'General', 'Communication', 'Payments', and 'Shipping'. The right sidebar shows a 'Show more' button and a search bar.

Table No.	Table Caption	Field No. ↑	Field Caption	Notify
79	Company Information	2	Name	<input checked="" type="checkbox"/>
79	Company Information	4	Address	<input checked="" type="checkbox"/>
79	Company Information	6	City	<input checked="" type="checkbox"/>
79	Company Information	7	Phone No.	<input checked="" type="checkbox"/>
79	Company Information	12	Bank Name	<input checked="" type="checkbox"/>
79	Company Information	13	Bank Branch No.	<input checked="" type="checkbox"/>
79	Company Information	14	Bank Account No.	<input checked="" type="checkbox"/>
79	Company Information	19	Tax Registration No.	<input checked="" type="checkbox"/>
79	Company Information	30	ZIP Code	<input checked="" type="checkbox"/>
79	Company Information	31	State	<input checked="" type="checkbox"/>
79	Company Information	36	Country/Region Code	<input checked="" type="checkbox"/>
79	Company Information	38	IBAN	<input checked="" type="checkbox"/>
79	Company Information	39	SWIFT Code	<input checked="" type="checkbox"/>

#39: Monitor sensitive fields

Contoso Electronics Dynamics 365 Business Central Environment: v25US

Company Information

Related ▾

General Show more

Name	CRONUS USA, Inc.	Country/Region Code	US ▾
Address	1234 South Ashford Street	Contact Name	Adam Matteson
Address 2	Westminster	Phone No.	+1 425 555 0100
City	Atlanta ...	Federal ID No.	
State	GA	EORI Number	
ZIP Code	31772 ...	Picture	
SAT ZIP Code			

Communication Show more

Email		EIN Number	
Home Page		IRS Contact No.	▾

Payments Show more

Bank Name	World Wide Bank	Payment Routing No.	99-99-999
Bank Branch No.	US99999	Giro No.	888-9999

#39: Monitor sensitive fields

Business Central Extended Security - Monitored Change Notification



Ester Henderson

To: Ester Henderson



Mon 14/10/2024 12:04

**You are signed up to receive email notifications when certain data is changed in the CRONUS USA, Inc. company in Microsoft Dynamics 365 Business Central.
This message is to inform you that the following change was made:**

Extended Security has detected a [change](#) in a Company Information field marked for monitoring:

Original "Address" Value: 3782 South Ashford Street

New "Address" Value: 1234 South Ashford Street

Changed By: ADMIN

Changed Date/Time: 10/14/24 12:04 PM

[Effective permissions](#) for user ADMIN allowed for this change.

Notification messages are sent automatically and cannot be replied to.

Reply

Forward



Tip # 40

#40: Fine tune which data is searched – per role

Don't search tables you never need to search

The screenshot shows the Dynamics 365 Business Central user interface for 'Contoso Electronics'. A search bar at the top center contains the text 'reled'. A search results dropdown menu is open, displaying the following sections:

- Tell me what you want to do** (with share and close icons)
- Search input field containing 'reled'
- Go to Pages and Tasks** (with 'Show all (6)' link)
- Transformation Rules (Administration)
- Payment Application Rules (Tasks)
- My Settings (Administration)
- Search for 'relec'**
- Search company data (highlighted with a blue box)
- Search Help

Below the search results, a message reads: "Didn't find what you were looking for? Try exploring pages or exploring reports". The background shows a dashboard with various data cards, including 'Sales Quotes - Open' (2), 'Sales Orders - Open' (9), and 'Intercompany' sections.

#40: Fine tune which data is searched – per role

Don't search tables you never need to search

The screenshot shows the Dynamics 365 Business Central search interface. The search bar contains the text 'relecloud'. The search results are displayed in a table with the following categories and items:

Description	
Contacts	
CT000010	Jesse Homer: Company Name: Relecloud
CT000009	Relecloud: Name: Relecloud
Customers	
50000	Relecloud: Name: Relecloud
Customer Ledger Entries	
1928:	Customer Name: Relecloud
2207:	Customer Name: Relecloud
2152:	Customer Name: Relecloud
Customer Ledger Entries: Show all results	
Sales Invoices	
S-INV102205	Relecloud: Name: Relecloud
Posted Sales Shipments	
S-SHPT102197	Relecloud: Name: Relecloud

The 'Results' section header is highlighted with a blue box, and the 'Set up where to search' button is also highlighted with a blue box. The search bar contains the text 'relecloud'.

#40: Fine tune which data is searched – per role

Don't search tables you never need to search

The screenshot shows the Dynamics 365 Business Central interface with a dialog box titled "Enable lists for searching" open. The dialog is for the role "Sales Order Processor". It features a search bar, "Edit List" and "Reset to default" buttons, and a toggle for "Show only search enabled lists" which is currently turned on. Below is a table with columns for List No., List Name, Enable Search, and Main Source Table. The "Enable Search" column contains checkboxes, with "Customers", "Sales Quotes", and "Sales Invoices" checked.

List No. ↑	List Name	Enable Search	Main Source Table
15	Locations	<input type="checkbox"/>	Location
25	Customer Ledger Entries	<input type="checkbox"/>	Cust. Ledger Entry
32	Items	<input type="checkbox"/>	Item
33	Customers	<input checked="" type="checkbox"/>	Customer
77	Resources	<input type="checkbox"/>	Resource
142	Posted Sales Shipments	<input type="checkbox"/>	Sales Shipment Header
143	Posted Sales Invoices	<input type="checkbox"/>	Sales Invoice Header
144	Posted Sales Credit Memos	<input type="checkbox"/>	Sales Cr.Memo Header
904	Assembly List	<input type="checkbox"/>	Assembly Header
5052	Contacts	<input type="checkbox"/>	Contact
9300	Sales Quotes	<input checked="" type="checkbox"/>	Sales Header
9301	Sales Invoices	<input checked="" type="checkbox"/>	Sales Header
9302	Sales Credit Memos	<input type="checkbox"/>	Sales Header
9303	Blanket Sales Orders	<input type="checkbox"/>	Sales Header
9304	Sales Return Orders	<input type="checkbox"/>	Sales Header

#40: Fine tune which data is searched – per role

Don't search tables you never need to search

The screenshot shows the Dynamics 365 Business Central interface for Contoso Electronics. A search bar is open with the text 'reled' entered. The search results are displayed in a list format under the heading 'Go to Pages and Tasks'. The results include:

- Transformation Rules (Administration)
- Payment Application Rules (Tasks)
- My Settings (Administration)

Below the search results, there are options to 'Search for 'relec'', 'Search company data', and 'Search Help'. A message at the bottom of the search results says 'Didn't find what you were looking for? Try exploring pages or exploring reports'.

The background of the screenshot shows the main dashboard with various tiles for 'For Release', 'Intercompany', 'User Tasks', and 'Email Status'. The 'For Release' section includes tiles for 'Sales Quotes - Open' (2), 'Sales Orders - Open' (9), and several '0' tiles. The 'Intercompany' section includes 'Incoming Transactions' (New Intercom... 0, Rejected... 0) and 'Outgoing Transactions' (Intercompany ... 0). The 'User Tasks' section includes 'My User Tasks' (Pending User Tasks 0). The 'Email Status' section includes 'Email Activities' (Failed Emails in Outbox, Draft Emails in Outbox, Sent Emails Last 30 Days).

#40: Fine tune which data is searched – per role

Don't search tables you never need to search

The screenshot shows the Dynamics 365 Business Central search interface. The search bar contains the text 'relecloud'. The search results are displayed in a table with the following data:

Description	
→	Customers
	50000 Relecloud: Name: Relecloud
	Sales Invoices
	S-INV102205 Relecloud: Name: Relecloud

A callout box at the bottom of the search results area contains the text: "Leaner search results + better use of system resources".



Tip # 41

#41: When to update apps after a Business Central update

The screenshot displays the Dynamics 365 Business Central admin center interface. The top navigation bar includes the Contoso Electronics logo, the text "Dynamics 365 Business Central admin center", and user profile icons. A secondary navigation bar contains links for Apps, Sessions, Database, Support, Update Settings, Copy, Restore, Rename, Delete, and Refresh. The left sidebar lists various management areas: Environments (selected), Notification Recipients, Microsoft Entra Apps, Telemetry, Reported Outages, Operations, and Capacity. The main content area shows the "Environments > v25US" page. It features three main sections: "Details", "Version Management", and "Linked Power Platform Environment".

Details Active

Name	Application Family	Country/region	Azure Region
v25US	Business Central	US	South Central US
Type	Telemetry	Security Group	Access with Microsoft 365 Licenses
Production	Not Set (Define)	Not Set (Define)	On (Modify)
URL https://businesscentral.dynamics.com/5e39e051-2efc-43b7-b612-932bd2473990/v25US			

Version Management

Application Version	Platform Version	Available Update Version	Update Scheduling Available
25.0.23364.25209	25.0		?
Update will start on or after	Update Window (UTC-06:00)	Update Rollout State	Apps Update Cadence
	21:00 - 04:00 (Modify)		Default (Modify)

Linked Power Platform Environment

Environment
Not Set (Link Power Platform environment)

#41: When to update apps after a Business Central update

Contoso Electronics Dynamics 365 Business Central admin center

Environments > v25US

Details

Name	Application Family	Country/region	Azure Region
v25US	Business Central	US	South Central
Type	Telemetry ?	Security Group	Access with Microsoft Account ?
Production	Not Set (Define)	Not Set (Define)	On (Modify)
URL https://businesscentral.dynamics.com/5e39e051-2efc-43b7-b612-932bd2473990/v25US			

Version Management

Application Version	Platform Version	Available Updates
25.0.23364.25209	25.0	
Update will start on or after	Update Window (UTC-06:00) ?	Update Rollout Strategy ?
	21:00 - 04:00 (Modify)	

Linked Power Platform Environment

Environment ?
Not Set (Link Power Platform environment)

Set Apps Update Cadence

v25US

AppSource apps update automatically when your environment updates, and you can choose below whether this should happen with every minor and major update, or only with major updates. Per-tenant extensions are not affected by this setting and will update as chosen when the app package was uploaded to the environment.

If you set the app update cadence to Default, Microsoft will decide which updates to your environment will also update the installed AppSource apps. Currently we will only do this with major updates, but we may decide to include minor updates in the future.

Apps update cadence: *

Default

With minor and major updates

With major updates

Save Cancel

Default: Currently, we update apps on major updates. May decide to change that in the future.



Tip # 42

#42: Easily get a fresh sandbox based off your production environment

Dynamics 365 Business Central admin center

+ New Refresh Recently deleted environments

Environments

Name	Application Family	Type	State	Country/region	Current Version	Available Update Version
Production 	Business Central	Production	Active	US	23.0.12034.12676	
Sandbox 	Business Central	Sandbox	Active	US	23.0.12034.12474 (Pre...	
Sandbox2023rw2 	Business Central	Sandbox	Active	US	23.0.12034.12676	

Essentials

Service health

 0 incidents or advisories.

#42: Easily get a fresh sandbox based off your production environment

Dynamics 365 Business Central admin center

Apps Sessions Database Support Update Settings Copy Restore Rename Delete Refresh

Environments > Production

Details				Active ⓘ
Name	Application Family	Country/region	Azure Region	
Production	Business Central	US	South Central US	
Type	Application Insights Connection String ⓘ	Security Group	Access with Microsoft 365 Licenses ⓘ	
Production	Not Set (Define)	Not Set (Define)	Off (Modify)	
URL				
https://businesscentral.dynamics.com/7d009676-bfe0-45ef-a25b-99ef37ef460d/Production				

Version Management			
Application Version	Platform Version	Available Update Version	Update Scheduling Available ⓘ
23.0.12034.12676	23.0		

#42: Easily get a fresh sandbox based off your production environment

The screenshot shows the Dynamics 365 Business Central admin center interface. The top navigation bar includes 'Apps', 'Sessions', 'Database', 'Support', and 'Update Settings'. The left sidebar contains various navigation options. The main content area is titled 'Environments > Production' and displays details for the 'Production' environment. A 'Copy environment' dialog box is open on the right side of the screen.

Environments > Production

Details

Name	Application Family	Country/region
Production	Business Central	US
Type	Application Insights Connection String (?)	Security Group
Production	Not Set (Define)	Not Set (Define)
URL	https://businesscentral.dynamics.com/7d009676-bfe0-45ef-a25b-99ef37ef46	

Version Management

Application Version	Platform Version	Available Update Version
23.0.12034.12676	23.0	

Copy environment

Production

Learn more about copying environments in the following article: [Managing Production and Sandbox Environments in the Admin Center](#).

When you copy an environment that integrates with other services, ensure that you avoid any interference with production data.

New environment name: *

CopyFromProd

Do not add personal data to the environment name as this is not treated as restricted data.

New environment type:

Sandbox

Copy **Cancel**

#42: Easily get a fresh sandbox based off your production environment

dynamics 365 Business Central admin center

Apps Sessions Database Support Update Settings Copy Restore Rename Delete Refresh

Environments > Production

Details				Active ⓘ	Copy Scheduled
Name	Application Family	Country/region	Azure Region		
Production	Business Central	US	South Central US		
Type	Application Insights Connection String ⓘ	Security Group	Access with Microsoft 365 Licenses ⓘ		
Production	Not Set (Define)	Not Set (Define)	Off (Modify)		
URL					
https://businesscentral.dynamics.com/7d009676-bfe0-45ef-a25b-99ef37ef460d/Production					

Version Management			
Application Version	Platform Version	Available Update Version	Update Scheduling Available ⓘ
23.0.12034.12676	23.0		

#42: Easily get a fresh sandbox based off your production environment

The image shows a screenshot of the Dynamics 365 Business Central admin center interface. The main window displays the 'Environments' section, which lists several environments: Production, CopyFromProd, Sandbox, and Sandbox2023rw2. The 'CopyFromProd' environment is highlighted. A modal window titled 'Available Companies' is open, showing a search bar and a list of companies. The 'CopyFromProd' environment is selected, and the 'Available Companies' modal shows the 'CRONUS USA, Inc.' company selected for the 'CopyFromProd' environment. The 'Production' environment also shows 'CRONUS USA, Inc.' as the selected company. The 'My Company' option is also visible in both sections.

Environments

Name	Application Family
Production	Business Central
CopyFromProd	Business Central
Sandbox	Business Central
Sandbox2023rw2	Business Central

Available Companies

Search:

CopyFromProd

- CRONUS USA, Inc.** ✓
- My Company

Production

- CRONUS USA, Inc.**
- My Company

Service health

0 incidents or advisories.



Tip # 43

#43: Add any (table) field to the page

Microsoft Dynamics 365 Business Central

Environment: Production

My Company | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer | Prices & Discounts | Report

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (\$)	Balance Due (\$)	Sales (\$)	Pa
C00070	⋮	Some Company 1				0.00	0.00	0.00	
C00080		Some Company 2				0.00	0.00	0.00	
C00090		Some Company 3				0.00	0.00	0.00	
C00100		Some Company 4				0.00	0.00	0.00	
C00110		Some Company 5				0.00	0.00	0.00	
C00120		Some Company 6				0.00	0.00	0.00	
C00130		Some Company 7				0.00	0.00	0.00	
C00140		Some Company 8				0.00	0.00	0.00	
C00150		Some Company 9				0.00	0.00	0.00	
C00160		Some Company 10				0.00	0.00	0.00	

#43: Add any (table) field to the page

The screenshot displays the Microsoft Dynamics 365 Business Central interface. The main window shows the 'Profiles (Roles)' table. The table has columns for Profile ID, Display Name, Source, Role Center ID, and Use as default profile. The 'BUSINESS MANAGER' profile is highlighted in blue. The background shows a list of customers and a sales table.

Profile ID	Display Name ↑	Source	Role Center ID	Ena...	Use as def... prof...
ACCOUNTANT	Accountant	Base Application	9027	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ACCOUNTING MANAGER	Accounting Manager	Base Application	9001	<input type="checkbox"/>	<input type="checkbox"/>
AP COORDINATOR	Accounts Payable Coordinator	Base Application	9002	<input type="checkbox"/>	<input type="checkbox"/>
AR ADMINISTRATOR	Accounts Receivable Administr...	Base Application	9003	<input type="checkbox"/>	<input type="checkbox"/>
SECURITY ADMINISTRATOR	Administration of users, securit...	Base Application	9024	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BLANK	Blank Profile	System Application	8999	<input type="checkbox"/>	<input type="checkbox"/>
BOOKKEEPER	Bookkeeper	Base Application	9004	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS MANAGER	Business Manager	Base Application	9022	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BUSINESS MANAGER EVALU...	Business Manager Evaluation	Base Application	9022	<input checked="" type="checkbox"/>	<input type="checkbox"/>
COMPANYHUB	Company Hub	Company Hub	1151	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CREDIT MANAGER	Credit and Collections Manager	Base Application	36603	<input type="checkbox"/>	<input type="checkbox"/>
EMPLOYEE	Employee	Base Application	8999	<input type="checkbox"/>	<input type="checkbox"/>
FIN	Finance	Base Application	8901	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HR	Human Resources	Base Application	8902	<input checked="" type="checkbox"/>	<input type="checkbox"/>

#43: Add any (table) field to the page

Microsoft Dynamics 365 Business Central

Environment: Production

Profile (Role)

Profile (Role)

Customize pages | Copy profile... | Clear customized pages | More options

General

Profile ID	BUSINESS MANAGER	Role Center ID	9022 ...
Source	Base Application	Enabled	<input checked="" type="checkbox"/>
Display Name	Business Manager	Show in Role Explorer	<input type="checkbox"/>
Description	Functionality for managers in charge of keeping the business viable by determining product and		

Additional Settings

Use as default profile	<input type="checkbox"/>	Disable personalization	<input type="checkbox"/>
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Notes +

(There is nothing to show in this view)

#43: Add any (table) field to the page

The screenshot shows the Dynamics 365 Business Central interface. At the top, the navigation bar includes 'Dynamics 365 Business Central', 'Environment: Production', and 'Clear customization...'. Below this, the 'Customizing Business Manager' tab is active, with 'Business Manager' and '+ Field' visible. The main navigation area shows 'My Company' and various functional areas like Finance, Cash Management, Sales, Purchasing, etc. A context menu is open over the 'Customers' field, with options: 'Move', 'Hide', and 'Open (Ctrl+Click)'. The 'Open (Ctrl+Click)' option is highlighted by the mouse cursor. The main content area displays a personalized greeting: 'Good afternoon, Søren Alexandersen!'. Below the greeting, there are 'Activities' and a dashboard with four summary cards: 'Sales This Month' (\$0), 'Overdue Sales Invoice Amount' (\$0), 'Overdue Purch. Invoice Amount' (\$0), and 'Sales Invoices Predicted Overdue' (0). At the bottom, there are three sections: 'Ongoing Sales' (Sales Quotes: 0, Sales Orders: 0, Sales Invoices: 0), 'Ongoing Purchases' (Purchase Orders: 0, Ongoing Purch. Invoices: 0, Purch. Invoices Next Week: 0), and 'Payments' (Unprocessed Payments: 0, Average Collection Days: 0.0, Outstanding V. Invoices: 0).

#43: Add any (table) field to the page

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. Below this, a navigation bar includes 'Customers' and a '+ Field' button. A 'Clear customization...' link and a red 'Done' button are also present.

The main content area shows a table of customers. The table has columns for 'No.', 'Name', 'Responsibility Center', 'Location Code', 'Phone No.', 'Contact', 'Balance (\$)', and 'Balance Du'. The first row is highlighted in light blue.

On the right side, a sidebar titled 'Add Field to Page' is open. It contains a search bar with 'All fields (Preview)' selected. Below the search bar, a list of fields is displayed, including 'Text Address', 'Text Address 2', 'Boolean Allow Line Disc.', 'Boolean Allow Multiple Posting Group', 'Decimal Amount', 'Option Application Method', 'Decimal Balance', 'Decimal Balance Due', and 'Decimal Balance on Date'.

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (\$)	Balance Du
C00070	Some Company 1					0.00	
C00080	Some Company 2					0.00	
C00090	Some Company 3					0.00	
C00100	Some Company 4					0.00	
C00110	Some Company 5					0.00	
C00120	Some Company 6					0.00	
C00130	Some Company 7					0.00	
C00140	Some Company 8					0.00	
C00150	Some Company 9					0.00	
C00160	Some Company 10					0.00	

#43: Add any (table) field to the page

ynamics 365 Business Central

Environment: Production

My Company | Finance | Cash Management | **Sales** | Purchasing | Shopify | All Reports

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer | Prices & Discounts | Report | ...

No. ↑	Name	Address	City	ZIP Code	State	Responsibility Center	Location Code	Phone No.	Contact
C00070	Some Company 1	Some Street and Number 1	Montgomery	36101	Alabama				
C00080	Some Company 2	Some Street and Number 2	Charlotte	28201	North Carolina				
C00090	Some Company 3	Some Street and Number 3	Anchorage	99501	Alaska				
C00100	Some Company 4	Some Street and Number 4	Phoenix	85001	Arizona				
C00110	Some Company 5	Some Street and Number 5	Philadelphia	19019	Pennsylvania				
C00120	Some Company 6	Some Street and Number 6	Albuquerque	87101	New Mexico				
C00130	Some Company 7	Some Street and Number 7	Utica	39175	Mississippi				
C00140	Some Company 8	Some Street and Number 8	Deeth	89823	Nevada				
C00150	Some Company 9	Some Street and Number 9	Vallery Falls	97630	Oregon				
C00160	Some Company 10	Some Street and Number 10	Portage	04768	Maine				



Tip # 44

#44: Easily import master data

The screenshot displays the Microsoft Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' on the left and 'Environment: Production' with search, notification, and settings icons on the right. Below the header, a navigation bar includes 'My Company' and several menu items: 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Shopify', and 'All Reports'. The main content area is titled 'Customers: All' and features a search bar, an 'Analyze' toggle, and buttons for '+ New' and 'Delete'. A secondary navigation bar contains 'Home', 'New Document', 'Customer', 'Prices & Discounts', and 'Report'. A context menu is open over a table, showing options: 'Open in Excel', 'Edit in Excel' (highlighted), 'Share to Teams', and 'Copy link'. The table has columns for 'No.', 'Name', 'Responsibility Center', 'Location Code', 'Phone No.', 'Contact', 'Bal', 'Sales (\$)', and 'Pe'. The table is currently empty, with the message '(There is nothing to show in this view)' centered below the column headers.

#44: Easily import master data

The screenshot displays the Microsoft Excel interface with the following components:

- Customer Card** header with a search bar (Search (Alt + Q)).
- Ribbon** with tabs: File, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, Help, and **Table Design**.
- Table Design** ribbon groups: Font (Calibri, 11), Alignment (Wrap Text, Merge & Center), Number (Text, \$, %, .00, .0), Styles (Conditional Formatting, Format As Table, Cell Styles), Cells (Insert, Delete, Format), Editing (AutoSum, Clear, Sort & Filter, Find & Select), Add-ins (Add-ins), and Analyze Data.
- Table** with columns: Name, CFDI Customer Name, Name 2, Search Name, IC Partner Code, Balance (\$), Balance Due (\$), Credit Limit (\$), Blocked, and Privacy Blocked.
- Microsoft Dynamics Data Connector** panel on the right with options: New, Refresh, Publish, Filter, and Design.
- Sheet1** tab at the bottom left.
- Automatic Workbook Statistics** indicator at the bottom left.
- Give Feedback to Microsoft** link at the bottom right.

#44: Easily import master data

The screenshot displays the Microsoft Dynamics 365 interface. At the top, there is a search bar and a navigation menu. Below this is the 'Table Design' ribbon with various formatting and editing options. The main area shows a data table with the following columns: Credit Limit (\$), Address, Address 2, Country/Region Code, City, State, ZIP Code, Phone No., and Mobile Phone No. The table contains 10 rows of data for different companies. The 'ZIP Code' column for 'Company 10' is highlighted with a green border and contains the value '04768'. On the right side, the 'Data Connector' pane is visible, showing the source 'Customer_Card_Excel' and the field 'ZIP Code'. The 'Publish' button in the Data Connector pane is highlighted with a blue box.

Company	Credit Limit (\$)	Address	Address 2	Country/Region Code	City	State	ZIP Code	Phone No.	Mobile Phone No.
Company 1	1000	Some Street and Number 1		US	Montgomery	Alabama	36101		
Company 2		Some Street and Number 2		US	Charlotte	North Carolina	28201		
Company 3	2000	Some Street and Number 3		US	Anchorage	Alaska	99501		
Company 4		Some Street and Number 4		US	Phoenix	Arizona	85001		
Company 5		Some Street and Number 5		US	Philadelphia	Pennsylvania	19019		
Company 6	1000	Some Street and Number 6		US	Albuquerque	New Mexico	87101		
Company 7		Some Street and Number 7		US	Utica	Mississippi	39175		
Company 8		Some Street and Number 8		US	Deeth	Nevada	89823		
Company 9	5000	Some Street and Number 9		US	Vallery Falls	Oregon	97630		
Company 10		Some Street and Number 10		US	Portage	Maine	04768		

#44: Easily import master data

ynamics 365 Business Central

Environment: Production

My Company | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer | Prices & Discounts | Report

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (\$)	Balance Due (\$)	Sales (\$)	Pa
C00070	⋮	Some Company 1				0.00	0.00	0.00	
C00080		Some Company 2				0.00	0.00	0.00	
C00090		Some Company 3				0.00	0.00	0.00	
C00100		Some Company 4				0.00	0.00	0.00	
C00110		Some Company 5				0.00	0.00	0.00	
C00120		Some Company 6				0.00	0.00	0.00	
C00130		Some Company 7				0.00	0.00	0.00	
C00140		Some Company 8				0.00	0.00	0.00	
C00150		Some Company 9				0.00	0.00	0.00	
C00160		Some Company 10				0.00	0.00	0.00	

Templates are not used when importing this way!



Tip # 45

#45: Easily jump to entity with CTRL+ALT+DOWN

Dynamics 365 Business Central

Environment: Prod

Item Card

1000 · Espresso Master

Home Request Approval Item Prices & Discounts Actions Related Reports Automate Fewer options

Copy Item Adjust Inventory Create Stockkeeping Unit Apply Template

Item

Show more

No.	1000	Base Unit of Me...	PCS
Description	Espresso Master	Item Category C...	EM
Blocked	<input type="checkbox"/>	Variant Mandat...	Default (No)
Type	Inventory		

Inventory

Show more

Shelf No.		Stockout Warning	Default (Yes)
Quantity on Hand	-12	Unit Volume	0
Qty. on Purch. O...	0	Over-Receipt Co...	
Qty. on Sales Or...	1		

Details Attachments (0)

Picture



Marketing Text

Create with Copilot Edit

Thank you!