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# DYNAMICS CON LIVE

MAY 2024



# 30 Tips and Tricks for Business Central

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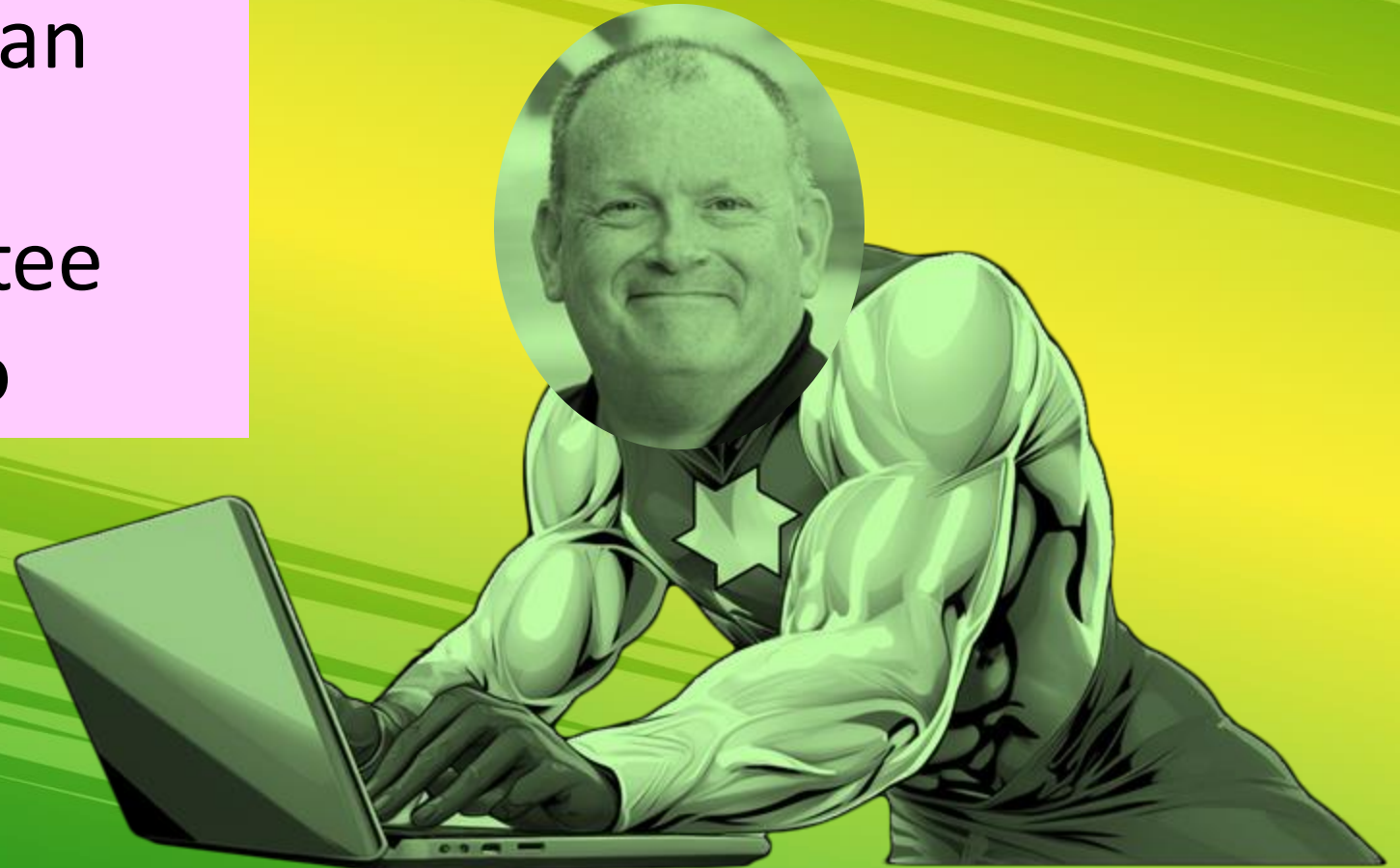
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774-254-1185



[BC 3 Amigos - YouTube](https://www.youtube.com/channel/UC...)



# Kim Dallefeld, MVP, MCT, MCP



28-year BC/NAV veteran  
Meetup Co-Leader  
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Community Superuser Qualifier

# #1 Date shortcuts

Work Date ..... 1/15/2024

Posting Date: w [calendar icon] 1/15/2024

Posting Date: 1/15/2024

× Posting Date: p3

× Posting Date: 02/01/24..02/29/24

Filter totals by: × Date Filter: p1..p3

Filter totals by: × Date Filter: 12/01/23..02/29/24

Posting Date: t [calendar icon] 1/15/2024

Posting Date: 1/15/2024

Posting Date: 15 [calendar icon] 1/15/2024

Posting Date: 1/15/2024

Posting Date: 0115 [calendar icon] 1/15/2024

Posting Date: 1/15/2024

Posting Date: 011524 [calendar icon] 1/15/2024

Posting Date: 1/15/2024



# # 2 Allow posting of deferred revenue & expenses

Dynamics 365 Business Central

Environment: US

## General Ledger Setup

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

### General

Allow Posting From: 5/1/2023

Allow Posting To: 5/31/2023

**Allow Deferral Postin...: 5/1/2023**

Allow Deferral Postin...: 5/31/2023

Register Time:

Local Address Format: City+State+ZIP Code

Local Cont. Addr. For...: After Company Name

Require Country/Regi...:

Inv. Rounding Precisi...: 0.01

Inv. Rounding Type (\$): Nearest

Local Currency Descri...: US dollar

Pmt. Disc. Excl. Tax:

Adjust for Payment Di...:

Unrealized Tax:

Prepayment Unrealiz...:

Max. Tax Difference A...: 10.00

Tax Rounding Type: Nearest

Bank Account Nos.: BANK

Bank Rec. Adj. Doc. N...:

Deposit Nos.:



# # 2 Override allowed deferral posting on specific users

Dynamics 365 Business Central

Environment: US

CRONUS USA, Inc. > Customers > Vendors

User Setup

✓ Saved

Search Analyze + 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	Resource No.	Time Sheet Ad...
→ SCHINSKY	1/1/2021	12/31/2024	1/1/2021	12/31/2024	Allowed	Prohibited		<input checked="" type="checkbox"/>

Get started

Here a can try

The Cronus com evaluation, and

Activities

Sales This Month

\$15,275

> See more

arn

Business browser

ect to other Microsoft services



# # 2 What is "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





## # 2 What is “Deferred revenue & expenses”?

### Deferring revenue example

Invoice service delivery of **12,000**

Service is being delivered in a 6-month period



# #3 Peeks

Type	Document No.	No. ↓	Description
	2018-8	85200	Entries, August 2018
		85200	Income Statement
			<input type="checkbox"/> Blocked

85200  
[Extraordinary Expenses](#)  
1,177.22

G/L Account Card ✎ ↗ + 🗑️

## 85200 · Extraordinary Expenses

[Home](#) Account Balance | Related ▾ Reports ▾ Automate ▾ Fewer options

📄 Posted Documents w...t Incoming Document 📄 Apply Template...

### General Show more

No. ....	85200	Balance .....	1,177.22
Name .....	Extraordinary Expenses	Reconciliation Account ...	<input type="checkbox"/>
Income/Balance .....	Income Statement	Automatic Ext. Text .....	<input type="checkbox"/>
Account Category .....	Expense	Direct Posting .....	<input checked="" type="checkbox"/>
Account Subcategory .....	Other Income & Expenses ...	Blocked .....	<input type="checkbox"/>



# #3 More Peeks

Batch Name: KIM

Analyze Manage Home Request Approval Payroll Line Incoming Document Page Actions Related Automate Fewer

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

Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Amount
1/15/2024		G00001	G/L Account	85200			0.00

No. Name Income/Ba... Bloc... Direct Post...

→ 85200 Extraordinary Expenses Income Stat...

+ New [Show details](#) Select fr...

### G/L Account Card

## 85200 · Extraordinary Expenses

Reminder: your work date is 1/15/2024 Use today | Change to... | Turn off reminder

Home Account Balance Related Reports Automate Fewer options

Posted Documents w...t Incoming Document Apply Template...

#### General

No. 85200 Balance 1,177.22

Name Extraordinary Expenses Reconciliation Account

Income/Balance Income Statement Automatic Ext. Text

Account Category Expense Direct Posting

Account Subcategory Other Income & Expenses Blocked

Debit/Credit Both Last Date Modified

Account Type Posting Omit Default Descr. in Jnl.

Totaling Review Policy None



# # 4 Determining how Credit Memos are posted

Dynamics 365 Business Central

Environment: US

## General Ledger Setup

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

Unit-Amount Roundi...	0.001	VAT in Use	<input type="checkbox"/>
Unit-Amount Decimal...	2:5	Show Amounts	Amount Only
Check G/L Acc. Deleti...		Hide Payment Metho...	<input type="checkbox"/>
Block Deletion of G/L ...	<input checked="" type="checkbox"/>	Posting Preview Type	Standard
Check G/L Account U...	<input type="checkbox"/>	SEPA Non-Euro Export	<input type="checkbox"/>
<b>Mark Cr. Memos as C...</b>	<input checked="" type="checkbox"/>	SEPA Export w/o Ban...	<input type="checkbox"/>
LCY Code	USD	Enable Data Check	<input type="checkbox"/>
Local Currency Symbol	\$		

### Dimensions

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



# # 4 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




# #5 Allow Posting From/To Dates X 2???


## General Ledger Setup

[Home](#) [Posting](#) [General](#) [Tax](#) [Bank](#) [Journal Templates](#)

[Change Payment Tolerance](#) [Change Global Dimen](#)

### General

Allow Posting From ..... 9/1/2019 

Allow Posting To ..... 1/31/2024 

## User Setup

[Search](#)  Analyze [+ New](#) [Edit Lis](#)

User ID ↑		Allow Posting From	Allow Posting To
→ DESKTOP-T1...	⋮	8/1/2019	12/31/2023



# #5 Default GL Accounts by Vendor

1

Standard Purchase Code Card

CLEANING · Monthly cleaning expenses for buildings

**General**

Code ..... CLEANING      Currency Code .....

Description ..... Monthly cleaning expenses for ...

Lines    Manage    Line    Fewer options

Type	No.	Description	Quantity	Departme... Code	Project Code	Customergro... Code	Area Code
→ G/L Account	65100	Cleaningfor administration		ADM			
G/L Account	65100	Cleaningfor production		PROD			

2

01254796 · Progressive Home Furnishings

Recurring Purchase Lines    Search    + New    Edit List    Delete    Card    More options

Code ↑	Description	Insert Rec. Lines On Quotes	Insert Rec. Lines On Orders	Insert Rec. Lines On Invoices	Insert Rec. Lines On Cr. Memos
→ CLEANING	Monthly cleaning expenses for buil...	Manual	Manual	Automatic	Manual

3

Purchase Invoice

1022 · Progressive Home Furnishings

Posting    Release    Prepare    Request Approval    Invoice    More options

**General**      Show more

Vendor Name ..... Progressive Home Furnishings      Due Date ..... 1/31/2023

Contact ..... Mr. Michael Sean Ray      Vendor Invoice No. .... \*

Posting Date ..... 1/25/2023      Status ..... Open

Lines    Manage    Line    Fewer options

Type	No.	Item Reference No.	Description/Comment	Quantity	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Del
→ G/L Account	65100		Cleaningfor administration	*			
G/L Account	65100		Cleaningfor production	*			



# #6 Ensuring people do not change payment methods

Dynamics 365 Business Central

Environment: US

## General Ledger Setup

Home Posting General Tax Bank Journal Templates Automate Fewer options

Amount Rounding Pr...	0.01	Bill-to/Sell-to VAT Calc.	Bill-to/Pay-to No.
Amount Decimal Plac...	2:2	Print tax specification...	<input type="checkbox"/>
Unit-Amount Roundi...	0.001	VAT in Use	<input type="checkbox"/>
Unit-Amount Decimal...	2:5	Show Amounts	Debit/Credit Only
Check G/L Acc. Deleti...	<input type="text"/>	Hide Payment Metho...	<input checked="" type="checkbox"/>
Block Deletion of G/L ...	<input checked="" type="checkbox"/>	Posting Preview Type	Standard
Check G/L Account U...	<input type="checkbox"/>	SEPA Non-Euro Export	<input type="checkbox"/>
Mark Cr. Memos as C...	<input checked="" type="checkbox"/>	SEPA Export w/o Ban...	<input type="checkbox"/>
LCY Code	USD	Enable Data Check	<input type="checkbox"/>
Local Currency Symbol	\$		

Dimensions Show more





# #6 Security – ensure no one channels funds to incorrect places

Dynamics 365 Business Central

Environment: US

Sales Invoice

S-INV102199 · Adatum Corporation

Home Prepare Print/Send Request Approval Invoice More options

Post Release

Payment Terms Code: 1M(8D) Payment Discount %: Pmt. Discount Date: 4/12/2023

Payment Method Code: SHADYBANK

Tax Liable

Tax Area Code

**Shipping and Billing**

Ship-to: SHADYBANK My shady bank account

Contact: + New

Shipment Method

Code ↑	Description
GIRO	Giro transfer
INTERCOM	Intercompany payment
MULTIPLE	Multiple payment methods
PAYPAL	PayPal payment
SHADYBANK	My shady bank account

Default (Customer)

https://businesscentral.dynamics.com/1b51e3f5-1823-4ecc-b22a-840bc0ac7e8b/US?company=CRONUS\_USA%2C\_Inc.&dc=0&aadTenantId=1b51e3f5-1823-4ecc-b22a-840bc0ac7e8b&runiframe=1#



# #7 Cronus data?

Setup for purchase accounts is wrong

Do not use production data unless you fix General Posting Setup

## General Posting Setup

Search Analyze New Edit List Delete Edit View

Show All Accounts

Gen. Bus. Posting Group ↑	Gen. Prod. Posting Group ↑	Sales Prepayments Account	Purch. Account	Purch. Credit Memo Account
→	MANUFACT		*	
	NO TAX		*	
	RAW MAT		*	
	RETAIL		*	
DOMESTIC	MANUFACT		10700	10700
DOMESTIC	NO TAX		10700	10700
DOMESTIC	RAW MAT		10700	10700
DOMESTIC	RETAIL		10700	10700
DOMESTIC	SERVICES		61500	61500



# #8 Use Background Posting to boost productivity

Dynamics 365 Business Central

Environment: US

## General Ledger Setup

Home Posting General Tax Bank Journal Templates Automate Fewer options

Dimensions Show more

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

### Background Posting

Post with Job Queue  Notify On Success

Post & Print with Job ...  Report Output Type PDF

Job Queue Category ... JRNLPOST

Reporting

Financial Report for B... M-BALANCE Financial Report for R... M-RETAINED

Financial Report for I... M-INCOME Additional Reporting



# #8 Printed documents turn up in Report Inbox (Post & Print)

Dynamics 365 Business Central

Environment: US

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

Customers | Vendors | Items | Bank Accounts | Chart of Accounts | General Ledger Setup | Sales & Receivables Setup | More

### Report Inbox

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



# #9 Receipt Entries?

**Posting a PO Receipt:**

**Debits**

**Interim Inventory**

**Credits**

**Accrued Acct Pay**

**Note: requires defining these fields in Inventory Posting Setup and General Posting Setup**

**Also, posts an accrual for inventory costs on sales shipments.**

## Inventory Setup

General   Posting   Journal Templates   More options

### General

Automatic Cost Posti...	<input checked="" type="checkbox"/>	Outbound Whse. Han...
Expected Cost Postin...	<input type="checkbox"/>	Inbound Whse. Handl...
Automatic Cost Adjus...	Always	Prevent Negative Inv...
Default Costing Meth...	FIFO	Variant Mandatory if ...
Average Cost Calc. Ty...	Item & Location & Variant	Skip Prompt to Creat...
Average Cost Period	Day	Copy Item Descr. to E...
Copy Comments Ord...	<input checked="" type="checkbox"/>	Allow Inventory Adju...
Copy Comments Ord...	<input checked="" type="checkbox"/>	



# #10 Warn about negative inventory

Dynamics 365 Business Central

Environment: US

CRONU Sales & Receivables Setup

## Sales & Receivables Setup

Customer Groups Payments More options

### General

Show less

Discount Posting	All Discounts	Copy Comments Ord...	<input checked="" type="checkbox"/>
Credit Warnings	Both Warnings	Copy Comments Ord...	<input checked="" type="checkbox"/>
<b>Stockout Warning</b>	<input checked="" type="checkbox"/>	Copy Cmts Ret.Ord. t...	<input checked="" type="checkbox"/>
Shipment on Invoice	<input checked="" type="checkbox"/>	Copy Cmts Ret.Ord. t...	<input checked="" type="checkbox"/>
Return Receipt on Cre...	<input type="checkbox"/>	Allow Tax Difference	<input checked="" type="checkbox"/>
Invoice Rounding	<input checked="" type="checkbox"/>	Calc. Inv. Discount	<input type="checkbox"/>
Default Item Quantity	<input type="checkbox"/>	Tax Bus. Posting Gr. (...)	
Create Item from Ite...	<input type="checkbox"/>	Exact Cost Reversing ...	<input type="checkbox"/>
Create Item from Des...	<input type="checkbox"/>	Check Prepmnt. when ...	<input type="checkbox"/>
Copy Customer Nam...	<input checked="" type="checkbox"/>	Prepmnt. Auto Update ...	Never



# #10 Warn about negative inventory

Dynamics 365 Business Central

Environment: US

Sales Order S-ORD101001 · Adatum Corporation

✕ The available inventory for item 1925-W is lower than the entered quantity at this location. Show details | Don't show again

Home Prepare Print/Send Request Approval Order Report More options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

NEW LINE Delete Line Select Items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
Item	1996-S		ATLANTA Whiteboard, base		12		
→ Item	⋮	1925-W	Conference Bundle 1-6		10		

Subtotal Excl. Tax (USD) 18,655.60 Total Excl. Tax (USD) 18,655.60

Inv. Discount Amount Excl. Tax 0.00 Total Tax (USD) 1,119.34



# #10 Override on the items

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

Type: Inventory  
Base Unit of Measure: PCS  
Last Date Modified: 10/2/2023


Common Item No.:  
Purchasing Code:  
Variant Mandatory if Exists: Default (No)

### Inventory

Shelf No.:  
Created From Catalog It...:   
Search Description: PARIS GUEST CHAIR, BLACK  
Quantity on Hand: -2  
Qty. on Purch. Order: 8  
Qty. on Sales Order: 0  
Qty. on Job Order: 0  
Qty. on Assembly Order: 0

Qty. on Asm. Component: 0  
Stockout Warning: No  
Prevent Negative Invent...: No  
Net Weight: 6.3  
Gross Weight: 9.55  
Unit Volume: 0.25  
Over-Receipt Code:

Details | Attachments (0)



Marketing Text

Create with Copilot | Edit

Create draft based on this item's attributes (preview). Review to make sure it's accurate.





# #11 Use Job Queue when?

Job queue is a feature to execute programs on a schedule.

Use them for such things as Adjust Cost – Item Entries to run nightly.

When you choose a report and the option to Schedule a one-time job queue is created

Job Queue Entries

Search Analyze + New Edit List Delete Edit View Set Status to Ready Restart Run once (foreground) Set On Hold

Status	User ID	Object Type to Run	Object ID to Run	Object Caption to Run	Description	Job Queue Category Code	User Session Started	Earliest Start Date/Time
→ On Hold	V_KIM.DALLEFELD_1	Report	1511	Delegate Approval Requests	Auto-created for sending of de...			1/4/2024 10:5
On Hold	V_KIM.DALLEFELD 1	Codeunit	6700	O365 Sync. Management	Auto-created for retrieval of ne...			1/4/2024 10:5
Ready	V_KIM.DALLEFELD 1	Codeunit	1350	Telemetry Management				1/20/2024 12:
Ready	<b>SYSTEM</b>	Codeunit	3997	Retention Policy JQ		RETENTION		1/9/2024 3:0C



# #12 Create a sales receipt document when posting credit memos

Dynamics 365 Business Central

Environment: US

CRONU Sales & Receivables Setup

## Sales & Receivables Setup

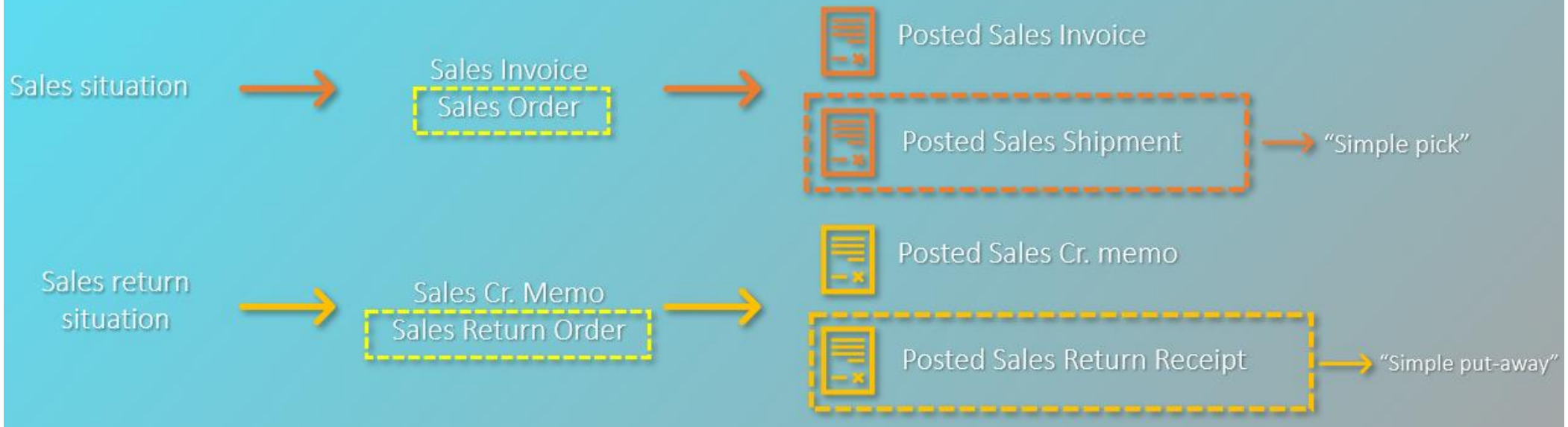
Customer Groups Payments More options

Stockout Warning	<input checked="" type="checkbox"/>	Copy Cmts Ret.Ord. t...	<input checked="" type="checkbox"/>
Shipment on Invoice	<input checked="" type="checkbox"/>	Copy Cmts Ret.Ord. t...	<input checked="" type="checkbox"/>
<b>Return Receipt on Cre...</b>	<input checked="" type="checkbox"/>	Allow Tax Difference	<input checked="" type="checkbox"/>
Invoice Rounding	<input checked="" type="checkbox"/>	Calc. Inv. Discount	<input type="checkbox"/>
Default Item Quantity	<input checked="" type="checkbox"/>	Tax Bus. Posting Gr. (...)	<input type="text"/>
Create Item from Ite...	<input type="checkbox"/>	Exact Cost Reversing ...	<input type="checkbox"/>
Create Item from Des...	<input type="checkbox"/>	Check Prepmt. when ...	<input type="checkbox"/>
Copy Customer Nam...	<input checked="" type="checkbox"/>	Prepmt. Auto Update ...	Never
Ext. Doc. No. Mandat...	<input type="checkbox"/>	Allow Document Dele...	<input type="text"/>
Appln. between Curre...	All	Ignore Updated Addr...	<input type="checkbox"/>
Logo Position on Doc...	No Logo	Skip Manual Reservat...	<input type="checkbox"/>



# #12 Why would I want a sales receipt document?

- Makes no difference for item movement  
(Movement is posted even without shipments/return receipts)
- Do you need shipment/return documents separately?
- Do you handle physical movement of items in a **separate process?**



# #13 No Service Mgt or Manufacturing?

This is licensed based

Essential license does not have Service or Manufacturing

Premium license is required



# #14 Managing expired sales quotes

Dynamics 365 Business Central

Environment: US

CRONU Sales & Receivables Setup

## Sales & Receivables Setup

Customer Groups Payments More options

Copy Customer Nam...	<input checked="" type="checkbox"/>	Prepmt. Auto Update ...	Never
Ext. Doc. No. Mandat...	<input type="checkbox"/>	Allow Document Dele...	
Appln. between Curre...	All	Ignore Updated Addr...	<input type="checkbox"/>
Logo Position on Doc...	No Logo	Skip Manual Reservat...	<input type="checkbox"/>
Default Posting Date	Work Date	Quote Validity Calcul...	1D
Default Quantity to S...	Remainder	Copy Line Descr. to G...	<input type="checkbox"/>
Auto Post Non-Invt. v...	None	Document Default Lin...	Item
Copy Comments Blan...	<input checked="" type="checkbox"/>	Disable Search by Na...	<input type="checkbox"/>

**Dimensions**

Customer Group Dim... Salesperson Dimensi...



# #14 Quote Valid To Date automatically calculated and Delete expired quotes (consider job queue)

Dynamics 365 Business Central

Environment: US

Sales Quote

S-QUO1004 · Adatum Corporation

Home Prepare Print/Send Request Approval Quote More options

Make Order Make Invoice Release Archive Document

General

Customer No. 10000 No. of Archived Versions 0

Customer Name Adatum Corporation Order Date 4/10/2023

External Document No. Document Date 4/10/2023

Sell-to Quote Valid To Date 4/11/2023

Dynamics 365 Business Central

Environment: US

CRONUS USA, Inc. Finance Cash Management Sales Purchasing Shopify

Sales Quotes: All Search + New Delete Home Release Print/Send Quote Actions

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Sell-to Contact
S-QUO1002	40000	Alpine Ski House		Ian Deberry
S-QUO1003	40000	Alpine Ski House		Ian Deberry
S-QUO1004	10000	Adatum Corporation		Robert Townes

Quote Valid To Date 4/11/2023

Customer Statistics

Customer No. 40000



# #15 Mycustomer, myvendors, myitems?

The screenshot shows a software interface with several navigation menus at the top: Vendors, Purchase Invoices, Purchase Credit Memos, Items, and Payment Journals. Below these are sub-menus for Purchase Orders, Purchase Return Orders, Bank Accounts, Purchase Journals, and General Journals. An 'Actions' section lists various tasks like '+ Vendor', '+ Purchase Order', '+ Purchase Invoice', and '+ Purchase Credit Memo'. An 'Insights' section shows 'Activities' and 'User Tasks' with 'Payments' and 'My User Tasks' cards. A 'My Vendors' popup window is open, showing a list of vendors with columns for 'Vendor No.' and 'Phone No.'. The vendor 'AIRHYD' is selected, and its details are shown below: 'AIRHYD' and '(254)629-1310'. The vendor 'CHS' is also visible in the list.

You manage the list, adding and deleting as desired.

Use the shortcut %myxxxxxx for quick filtering.

The screenshot shows the 'Vendors' list view in the software interface. The top bar includes 'Vendors: All', a search icon, and buttons for 'Analyze', '+ New', 'Delete', 'Process', 'New Document', and 'Vendor'. The 'Views' section on the left lists 'All', 'Balance', 'Vendors - Payment on Hold', and 'Balance'. The main table displays a list of vendors with columns for 'No.', 'Name', 'Location Code', and 'Phone No.'. The vendor 'AIRHYD' is selected, and its details are shown below: 'AIRHYD' and '(254)629-1310'. The vendor 'CHS' is also visible in the list. A search filter is applied, and the text '%myvendors' is entered in the search field, which is circled in red.

No. ↑	Name	Location Code	Phone No.
AIRHYD	Air & Hydraulic Equipment, Inc.		(254)629-1310
CHS	CORPORATE HOSPITALITY SER...		



# #16 Defaulting the line type to most used

*(Should this be a user preference?)*

Dynamics 365 Business Central

Environment: US

Sales & Receivables Setup

## Sales & Receivables Setup

Customer Groups | Payments | More options

Ext. Doc. No. Mandat...	<input type="checkbox"/>	Allow Document Dele...	<input type="text"/>
Appln. between Curre...	All	Ignore Updated Addr...	<input type="checkbox"/>
Logo Position on Doc...	No Logo	Skip Manual Reservat...	<input type="checkbox"/>
Default Posting Date	Work Date	Quote Validity Calcul...	1D
Default Quantity to S...	Remainder	Copy Line Descr. to G...	<input type="checkbox"/>
Auto Post Non-Invt. v...	None	Document Default Lin...	G/L Account
Copy Comments Blan...	<input checked="" type="checkbox"/>	Disable Search by Na...	<input type="checkbox"/>

### Dimensions

Customer Group Dim...	<input type="text"/>	Salesperson Dimensi...	<input type="text"/>
-----------------------	----------------------	------------------------	----------------------





# #16 Example of defaulting type to G/L Account

Dynamics 365 Business Central

Environment: US

Sales Order

S-ORD101001 · Adatum Corporation

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

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

Order Date 4/2/2023 Status Open

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
→ G/L Account	*		*				

Subtotal Excl. Tax (USD) 0.00 Total Excl. Tax (USD) 0.00



# #17 Same filters over and over?

Customers: All | Search | Analyze

No. ↑	
C00010	Blocked Customers
C00020	Customer And Contact
C00030	Customer and Salesperson
C00040	Customer Ship To Addresses
C00050	Customers with credit limits

Out of the Box

Customers: With Balances | Search | Analyze

Views

	No. ↑
All	C00040
<b>With Balances</b>	C00070

Filter list by:

× Balance (\$)

<>0

User Created

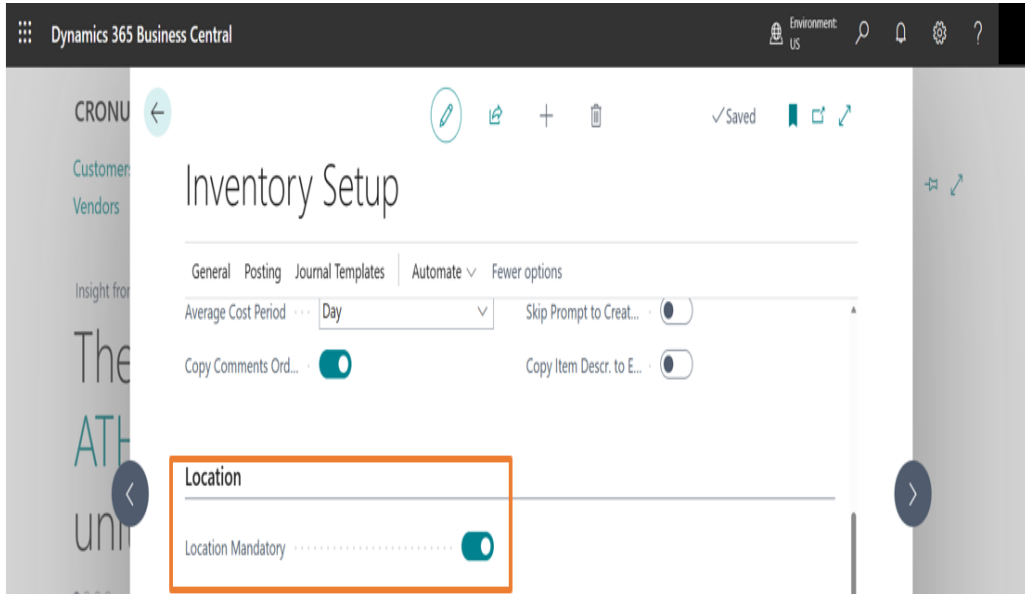
1. After filtering
2. Choose the Save icon
3. Give your filter a name
4. Select from either of the above



PS - %myxxxxxx works here also



# #18 Don't allow posting without Location code



Inventory Setup

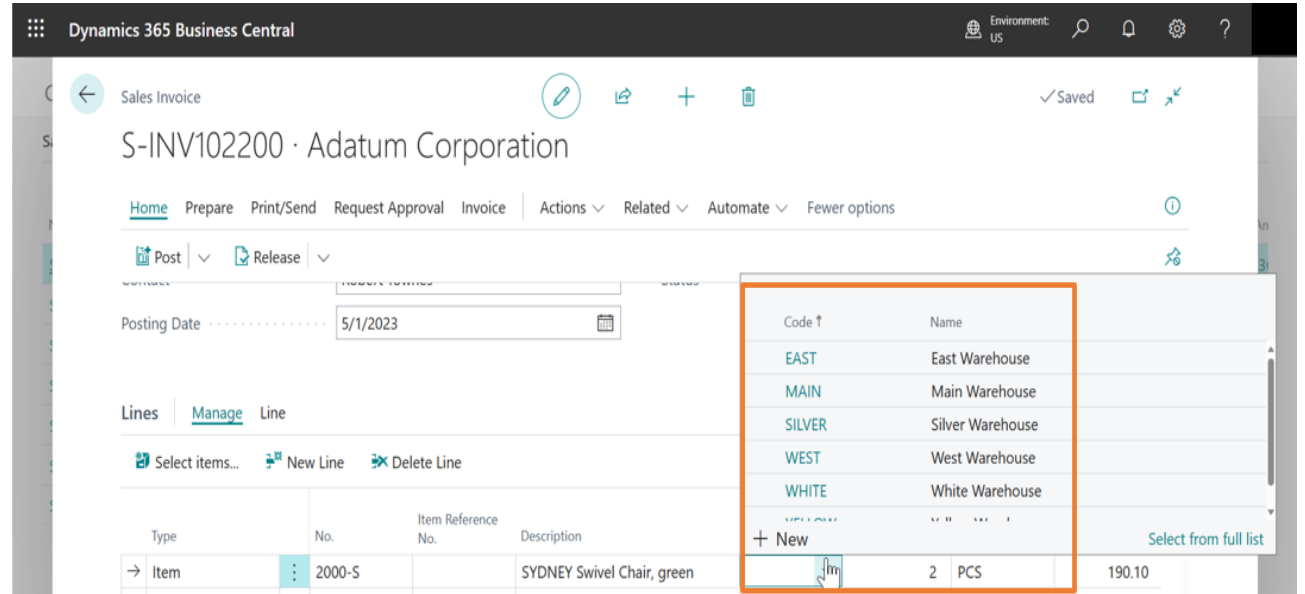
General Posting Journal Templates Automate Fewer options

Average Cost Period Day Skip Prompt to Creat...

Copy Comments Ord...  Copy Item Descr. to E...

Location

Location Mandatory



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

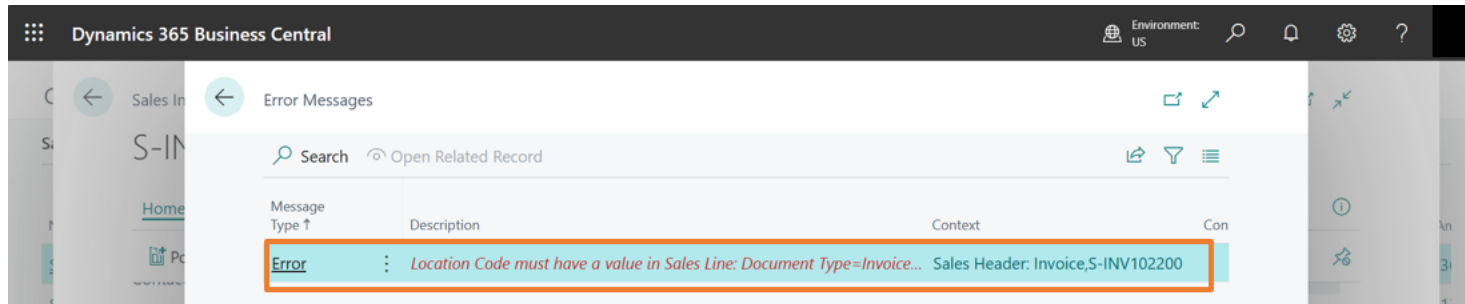
Lines Manage Line

Select items... New Line Delete Line

Type	No.	Item Reference No.	Description			
Item	2000-S		SYDNEY Swivel Chair, green			

Code	Name
EAST	East Warehouse
MAIN	Main Warehouse
SILVER	Silver Warehouse
WEST	West Warehouse
WHITE	White Warehouse
+ New	Select from full list

If you have locations, you probably want to use them, for consistency



Error Messages

Search Open Related Record

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



# #19 Stop Pesky Popups

**Teaching Tips –  
My Settings  
Toggle Off**



My Settings - V\_KIM.DALLEFELD 1

Role	Business Manager	...
Company	Test Strata	...
Work Date	1/19/2024	📅
Region	English (United States)	...
Language	English (United States)	...
Time Zone	(UTC-06:00) Central Time (US & Canada)	...
Notifications	Change when I receive notifications.	
Teaching Tips	<input checked="" type="checkbox"/>	

**Files**

Cloud Storage ..... Kim Dallefeld's files on OneDrive

**Security**

Your last sign in was on 01/19/24 12:37 PM.

OK Cancel



# #20 Set up a Currency Exchange Rate Service in 2 minutes

Dynamics 365 Business Central

Environment: DK

Currencies

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

Update Exchange Rates Exchange Rate Services

Code	Description	ISO Code	ISO Numeric Code	Exchange Rate Date	Exchange Rate	EMU Curr...	Realized Gains Acc.
AED	Arabiske Emirat...	AED	784	1/1/2021	2.00131	<input type="checkbox"/>	07330
AUD	Australske dollar	AUD	036	1/1/2021	2.9366	<input type="checkbox"/>	07330
BGN	Bulgarisk lev	BGN	975	1/1/2021	2.7063	<input type="checkbox"/>	07330
BND	Brunei Darussal...	BND	096	1/1/2021	3.3647	<input type="checkbox"/>	07330
BRL	Brasiliansk real	BRL	986	1/1/2021	2.0993	<input type="checkbox"/>	07330
CAD	Canadisk dollar	CAD	124	1/1/2021	3.6978	<input type="checkbox"/>	07330
CHF	Schweizer franc	CHF	756	1/1/2021	4.6526	<input type="checkbox"/>	07330
CZK	Tjekkiske koruna	CZK	203	1/1/2021	0.227896	<input type="checkbox"/>	07330
DZD	Algeriske dinar	DZD	012	1/1/2021	0.096039	<input type="checkbox"/>	07330
EUR	Euro	EUR	978	1/1/2021	5.5289	<input checked="" type="checkbox"/>	07330
FJD	Fiji-dollar	FJD	242	1/1/2021	2.5805	<input type="checkbox"/>	07330
GBP	Pund Sterling	GBP	826	1/1/2021	8.561644	<input type="checkbox"/>	07330
HKD	SAR Hongkong...	HKD	344	1/1/2021	0.7503	<input type="checkbox"/>	07330



# #20 Create new, name it: Fill in Service URL and add the details of the Field Mapping: Enable the service

Currency Exch. Rate Service

FLOATRATES · Float Rate Service

Preview Job Queue Entry More options

### General

Code ..... FLOATRATES **Enabled**

Description ..... Float Rate Service You must disable the service before you can make changes.

### Service

Service URL ..... **http://www.floatrates.com/daily/usd.xml** Service Provider ..... FloatRates

Terms of Service .....

### Field Mapping

New Line Delete Line Data Exchange Definition

Caption	Source	Default Value	Transformation Rule
<b>Field Mapping</b>	/channel/item		
Field Mapping	/channel/item/targetCurrency		
Field Mapping	/channel/item/pubDate		US_DATE_FORMAT
Field Mapping	/channel/item/exchangeRate		
Field Mapping	-	1	



# #21 Use a Company Badge?



Dynamics 365 Business Central

TST  
STR

Environment:  
Production



KD



✓ Saved



## Company Information

× This page contains sensitive business data. You can set up ... Enable Field Mo... | Don't show thi... ▾

Related ▾

\* General >

Communication >

\* Payments >

Shipping >

Tax >

Company Badge

Company Badge ... Custom ▾ Company Badge T... TSTSTR

Company Badge S... Light Yellow ▾

Super helpful

Stays on every screen, so you always know which company and database you are working in.

Easy to setup.

Yes, use it!!!



# #22 Use Item Templates to number new items

Dynamics 365 Business Central

Environment: US

CRONU

Item Templates

Items: All

Search + New Manage

No. ↑	Code ↑	Description	Vendor No
1000	ITEM	Item	
1896-S	SERVICE	Service	30000
1900-S	SWEATSHIRTS	Template for Sweatshirts	20000
1906-S	TSHIRTS	Template for t-shirts	30000
1908-S			30000
1920-S			20000
1925-W			
1928-S			10000
1929-W			
1936-S			20000
1953-W			





# #22 Set number series per template

Dynamics 365 Business Central

Environment: US

Item Template

## SWEATSHIRTS

Copy Template Dimensions More options

General

Code SWEATSHIRTS No. Series S-ITEMS

Description Template for Sweatshirts

Select a template for a new item

Code	Description
ITEM	Item
SERVICE	Service
SWEATSHIRTS	Template for Sweatshirts
TSHIRTS	Template for t-shirts

OK Cancel

When creating items, each template uses different numbering

Dynamics 365 Business Central

Environment: US

Item Card

## S00004 · Modern Sweatshirt

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

Copy Item Adjust Inventory Create Stockkeeping Unit Apply Template

Item

No. S00004

Description Modern Sweatshirt

Dynamics 365 Business Central

Environment: US

Item Card

## T00002 · Modern T-shirt

Home Request Approval Item Prices & Discounts Actions Related

Copy Item Adjust Inventory Create Stockkeeping Unit Apply Template

Item

No. T00002

Description Modern T-shirt



# #23 More Screen Real Estate?

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

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

No. ↑	Name	Phone No.	Contact	Allow Multi-Posting Groups	Balance (\$)	Balance Due (\$)
01121212	Spotsmeyer's Furnishings		Mr. Mike Nash	<input type="checkbox"/>	75,752.48	75,752.48
01445544	Progressive Home Furnishings		Mr. Scott Mitchell	<input type="checkbox"/>	2,461.00	2,461.00
01454545	New Concepts Furniture		Ms. Tammy L. McDonald	<input type="checkbox"/>	0.00	0.00
01905893	Candoxy Canada Inc.		Mr. Rob Young	<input type="checkbox"/>	0.00	0.00
01905899	Elkhorn Airport		Mr. Ryan Danner	<input type="checkbox"/>	0.00	0.00
01905902	London Candoxy Storage Cam...		Mr. John Kane	<input type="checkbox"/>	0.00	0.00
10000	The Cannon Group PLC		Mr. Andy Teal	<input checked="" type="checkbox"/>	191,053.72	191,053.72
20000	Selangorian Ltd.			<input type="checkbox"/>		
20309920	Metatorad Malaysia Sdn Bhd			<input type="checkbox"/>		
20312912	Highlights Electronics Sdn Bhd			<input type="checkbox"/>		
20339921	TraxTonic Sdn Bhd			<input type="checkbox"/>		
21233572	Somadis			<input type="checkbox"/>		

Details | Attachments (0)

Sell-to Customer Sales History

Customer No. 01121212

0	0	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	Ongoing Sales Invoices

Hide/Show Fact Boxes

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

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

No. ↑	Name	Phone No.	Contact	Allow Multi-Posting Groups	Balance (\$)	Balance Due (\$)	Sales (\$)	Payments (\$)
01121212	Spotsmeyer's Furnishings		Mr. Mike Nash	<input type="checkbox"/>	75,752.48	75,752.48	0.00	0.00
01445544	Progressive Home Furnishings		Mr. Scott Mitchell	<input type="checkbox"/>	2,461.00	2,461.00	2,461.00	0.00
01454545	New Concepts Furniture		Ms. Tammy L. McDonald	<input type="checkbox"/>	0.00	0.00	0.00	0.00
01905893	Candoxy Canada Inc.		Mr. Rob Young	<input type="checkbox"/>	0.00	0.00	0.00	0.00
01905899	Elkhorn Airport		Mr. Ryan Danner	<input type="checkbox"/>	0.00	0.00	0.00	0.00
01905902	London Candoxy Storage Campus		Mr. John Kane	<input type="checkbox"/>	0.00	0.00	0.00	0.00
10000	The Cannon Group PLC		Mr. Andy Teal	<input checked="" type="checkbox"/>	191,053.72	191,053.72	124,958.05	384,552.13
20000	Selangorian Ltd.		Mr. Mark McArthur	<input type="checkbox"/>	81,061.49	81,061.49	19,107.97	264,867.61
20309920	Metatorad Malaysia Sdn Bhd		Mrs. Azleen Samat	<input type="checkbox"/>	0.00	0.00	0.00	0.00
20312912	Highlights Electronics Sdn Bhd		Mr. Mark Darrell Boland	<input type="checkbox"/>	0.00	0.00	0.00	0.00



# #24 Sales forecasting per location

No need for Premium license, even though setting is on Manufacturing Setup

The screenshot shows the Dynamics 365 Business Central interface for the 'Manufacturing Setup' page. The page title is 'Manufacturing Setup' and it is in the 'Environment: US'.

Key settings visible include:

- Dynamic Low-Level C...**: Toggled ON.
- Numbering**: Planned Order Nos. is set to 'M-PLAN'.
- Planning**:
  - Current Demand Fore... is set to 'FORECAST'.
  - Use forecast on locati...**: Toggled ON (highlighted with an orange box).
  - Use forecast on varia... is Toggled OFF.
  - Default Safety Lead Ti... is set to '1D'.
  - Blank Overflow Level is set to 'Allow Default Calculation'.
  - Combined MPS/MRP ... is Toggled ON.
  - Components at Locat... is empty.
  - Default Dampener Pe... is empty.
  - Default Dampener % is set to '0.0'.



# #25 More Screen Real Estate?

Customer Card

01121212 · Spotsmeyer's Furnishings

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

**General** Show less

No.	01121212	Salesperson Code	PS
Name	Spotsmeyer's Furnishings	Responsibility Center	
IC Partner Code		Document Sending Profile	
Balance (\$)	75,752.48	Total Sales - Fiscal Year	0.00
Balance (\$) As Vendor	0.00	Costs (\$)	0.00
Balance Due (\$)	75,752.48	Profit (\$)	0.00
Credit Limit (\$)			
Blocked			
Privacy Blocked	<input type="checkbox"/>		

**Fast Tabs  
Collapse / Expand**

Customer Card

01121212 · Spotsmeyer's Furnishings

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

**General** Show more

No.	01121212	Credit Limit (\$)	0.00
Name	Spotsmeyer's Furnishings	Blocked	
Balance (\$)	75,752.48	Salesperson Code	PS
			0.00

Customer Card

01121212 · Spotsmeyer's Furnishings

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

**General** > Spotsmeyer's Furnishings PS



# #25 More Screen Real Estate?

Customer Card



✓ Saved

## 01454545 · New Concepts Furniture

Home Request Approval New Document Prices & Discounts Customer Report | Actions ▾ Related ▾ Reports ▾ Automate ▾ Fewer options

### General

Show more

No. ....	<input type="text" value="01454545"/>	<input type="text" value="..."/>	Balance Due (\$) .....	<input type="text" value="0.00"/>
Name .....	<input type="text" value="New Concepts Furniture"/>		Blocked .....	<input type="text" value=""/>
Balance (\$) .....	<input type="text" value="0.00"/>		Salesperson Code .....	<input type="text" value="PS"/>

## Personalize

Customer Card



✓ Saved

## 01454545 · New Concepts Furniture

Home Request Approval New Document Prices & Discounts Customer Report | Actions ▾ Related ▾ Reports ▾ Automate ▾ Fewer options

### General >

New Concepts Furniture | PS | 0.00

# #26 Copy the newly set up company (for testing or prod)

Dynamics 365 Business Central

Environment: US

CRONUS Companies

Search New Edit List Delete **Copy** Automate Fewer options

Name	Display Name	Evaluati... Company	Enable Assisted Company Setup	Setup Status
→ <u>CRONUS USA, Inc.</u>	⋮	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Completed
My Company		<input type="checkbox"/>	<input type="checkbox"/>	Completed

User Task  
My User Task  
Pending User Tasks  
Intercom  
Incoming Tasks



# #27 Default Item Quantity

## Sales & Receivables Setup

Customer Groups | Payments | More options

### General

Discount Posting ..... All Discounts ▾ Defau

Credit Warnings ..... Both Warnings ▾ Auto I

Stockout Warning .....  Allow

Invoice Rounding .....  Calc. I

Default Item Quantity ..  Tax Bu

Lines | [Manage](#) Line Order

New Line Delete Line Select items...

Type	No.	Variant Code	Description	Deferral Code	Locat... Code	Quantity	Unit of Measure Co
Item	1000		Bicycle		BLUE	*	PCS
→ Item	⋮	1000	Bicycle		BLUE	1	PCS

First line defaults no quantity

Turn on Default Item Quantity, second line defaults quantity to 1



# #28 Admin: Add languages so every user can feel at home

Microsoft | AppSource Apps Consulting Services Industry Clouds Partners

Apps > German language (Germany)

**German language (Germany)**  
by Microsoft  
Dynamics 365 Business Central  
Pricing Free **Get it now** Save to my list

Overview Ratings + reviews Details + support

This application adds the German language (Germany) to Microsoft Dynamics 365 Business Central. Microsoft Dynamics 365 Business Central is available in many languages. By installing this application, you are viewing the base application in German language (Germany).

The screenshot shows the Dynamics 365 Business Central interface for 'Chip and Dale Snack Co.'. A dialog box titled 'Available Languages' is open, displaying a list of languages. The 'German (Germany)' option is highlighted with a blue selection bar and a right-pointing arrow. The background interface shows navigation tabs like Finance, Cash Management, Sales, and Purchasing, along with a dashboard card for 'Your top customers'.

Name
English (United States)
Estonian (Estonia)
Finnish (Finland)
French (Belgium)
French (Canada)
French (France)
French (Switzerland)
German (Austria)
→ German (Germany)
German (Switzerland)
Greek (Greece)
Hungarian (Hungary)
Icelandic (Iceland)

User selects language in My Settings





# #28 All languages available, regardless which country you're in

## German user in US? No problem

Chip and Dale Snack Co.

< Finance

Cash Management

Sales

Purchasing

Logistik- Statistiken

Shopify



Customers

Bank Accounts

Fixed Assets

Planning Worksheets

Requisition Worksheets

Production BOMs

Vendors

Chart of Accounts

Recurring General Journals

Planned Production Orders

Jobs



Items

Dimensions

Fixed Asset Book Value 01

Released Production Orders

Purchasing Codes

Überschrift

# Guten Tag Steven Chinsky!

Aktionen

+ Sales Quote

+ Purchase Invoice

> Produktkonfigurator

+ Sales Order

> Find entries...

> Lager Zählung

+ Sales Invoice

> New

Excel Reports

+ Purchase Quote

> Payments

+ Purchase Order

> Reports

● ○ ○

Activities

Sales This Month

\$0

> Weitere Informationen

Overdue Sales Invoice  
Amount

\$45,526

> Weitere Informationen

Overdue Purch. Invoice  
Amount

\$48,437

> Weitere Informationen

Überfällige  
Verkaufsrechnungen

0

> Weitere Informationen



# #29 Auto Populate Qty to Receive/Ship?

## Sales & Receivables Setup

Customer Groups | Payments | More options

**General** Show more

Discount Posting ..... All Discounts

Default Quantity to S... Remainder

Credit Warnings ..... Both Warnings

Auto Post Non-Inv... None

## Purchases & Payables Setup

Vendor Posting Groups | Incoming Documents Setup | Automate | Fewer options

**General** Show more

Discount Posting ..... All Discounts

Exact Cost Reversing ...

Invoice Rounding .....

Prepmt. Auto Update... Never

Create Item from It...

Default Posting Date ... Work Date

Copy Vendor Name t...

Default Qty. to Receive Remainder

Lines | [Manage](#) | Line | Functions | Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Qty. to Receive
→ Item	1000	Bicycle		10	PCS	363.798	3,637.98	10



# #30 Admin can set Teaching tip visibility per user

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	SVC-1	MAIN

**About sales orders** ✕

Use a sales order when you partially ship or invoice an order, and when you use drop shipments or prepayments. For sales that are fully shipped and invoiced in one go, sales invoices are typically used instead.

[Show Help](#) [Take a tour](#)

Chip and  
Customers  
Vendors  
Items  
Headline  
War

User Settings

Search  Analyze  + New Manage

User ID ↑	Role	Language	Region	Company
<a href="#">SCHINSKY</a>	Business Manager	English (United States)	English (United States)	Nikkei MC A

tor



# #30 Admin can set Teaching tip visibility per user

The screenshot displays the 'User Settings' page for a user named 'SCHINSKY'. At the top, there are navigation icons (back, edit, share, add, delete) and a 'Saved' status. Below the user name, there are options to 'Clear Personalized Pages' and 'More options'. The 'General' section contains several settings:

User ID	SCHINSKY	...	Time Zone	(UTC-05:00) Eastern Time ...	...
Role	Business Manager	...	Company	Nikkei MC Aluminum	▼
Language	English (United States)	...	Teaching Tips	<input checked="" type="checkbox"/>	
Region	English (United States)	...			

The 'Teaching Tips' toggle switch is highlighted with an orange border, indicating it is currently turned on.



# General Business Central resources

## Learn more!



**Looking for resources?**

[aka.ms/BCUsers](https://aka.ms/BCUsers)



**Join the conversation**

[twitter.com/MSDyn365BC](https://twitter.com/MSDyn365BC)



**Need more training?**

[aka.ms/BCLearn](https://aka.ms/BCLearn)



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**Read the capability guide**

[aka.ms/BCcapabilities](https://aka.ms/BCcapabilities)



**Watch on-demand sessions**

[aka.ms/BCLE](https://aka.ms/BCLE)



# Questions and Answers





**THANK YOU!**

**Need Help:**

[schinsky@accelerynt.com](mailto:schinsky@accelerynt.com)

[kim@dallefeld.com](mailto:kim@dallefeld.com)