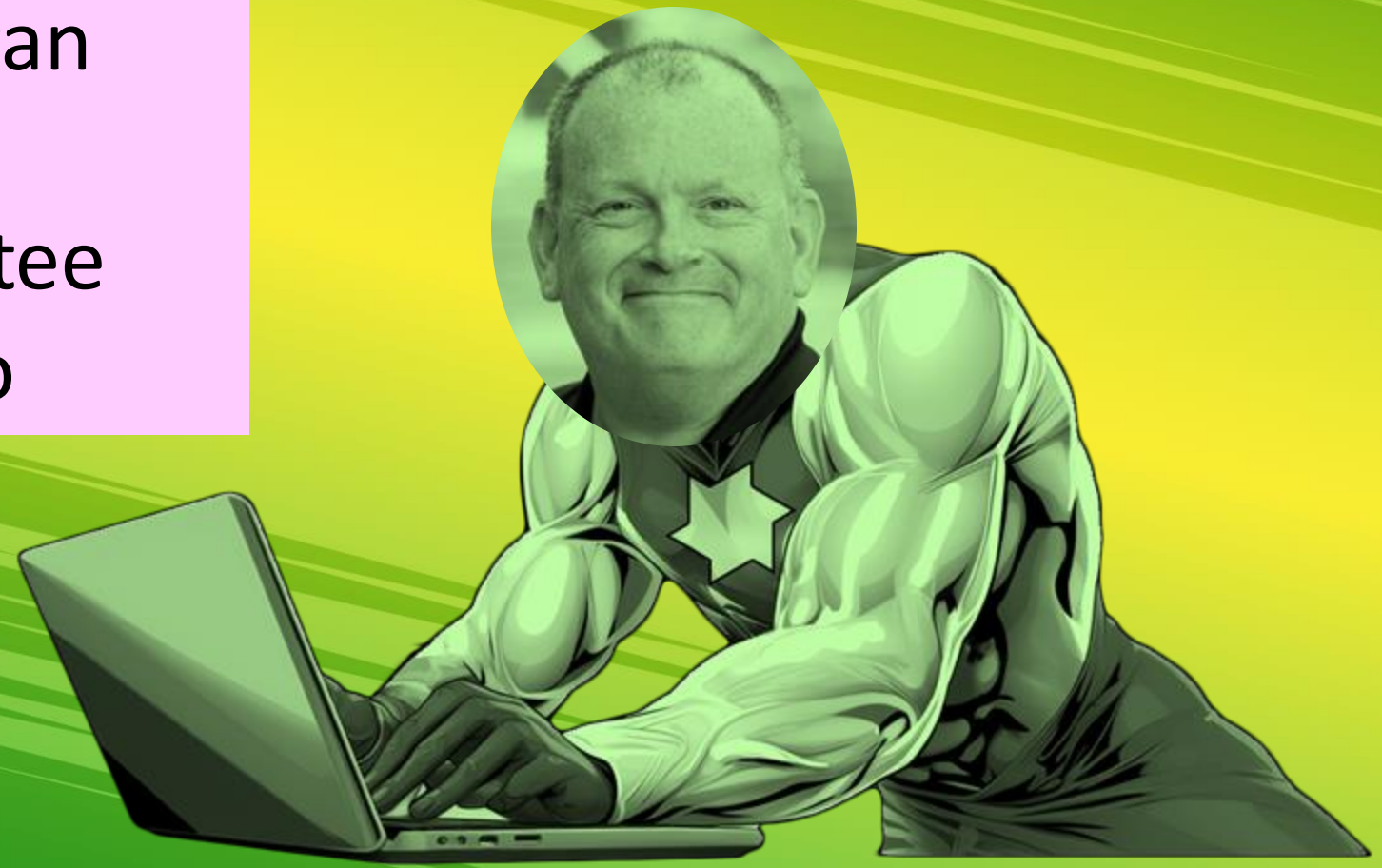
POWERED BY DUG
DYNAMICSCON
LIVE
MAY 2024
live.dynamicscon.com

30 Tips and Tricks for Business Central

Steve Chinsky, MVP, MCP

26-year BC/NAV veteran
Speaker/Volunteer
Programming Committee
Guardian Superhero



schinsky@accelerynt.com
@stevenchinsky
linkedin.com/in/steve-chinsky-321a20
774-254-1185

BC 3 Amigos - YouTube

Kim Dallefeld, MVP, MCT, MCP

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

#1 Date shortcuts

Work Date 1/15/2024

Posting Date: w

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

Posting Date: 1/15/2024

Posting Date: 15

Posting Date: 1/15/2024

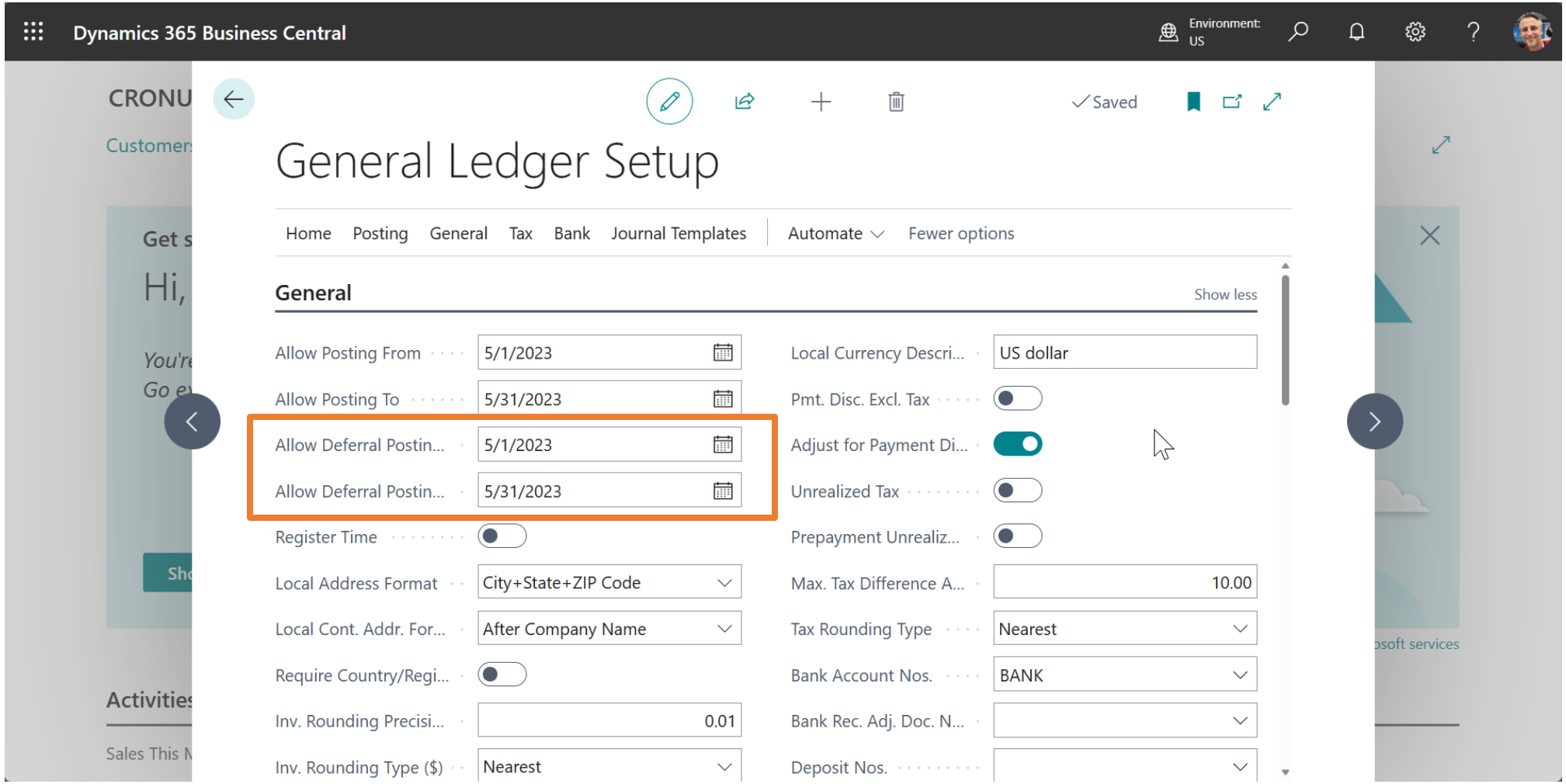
Posting Date: 0115

Posting Date: 1/15/2024

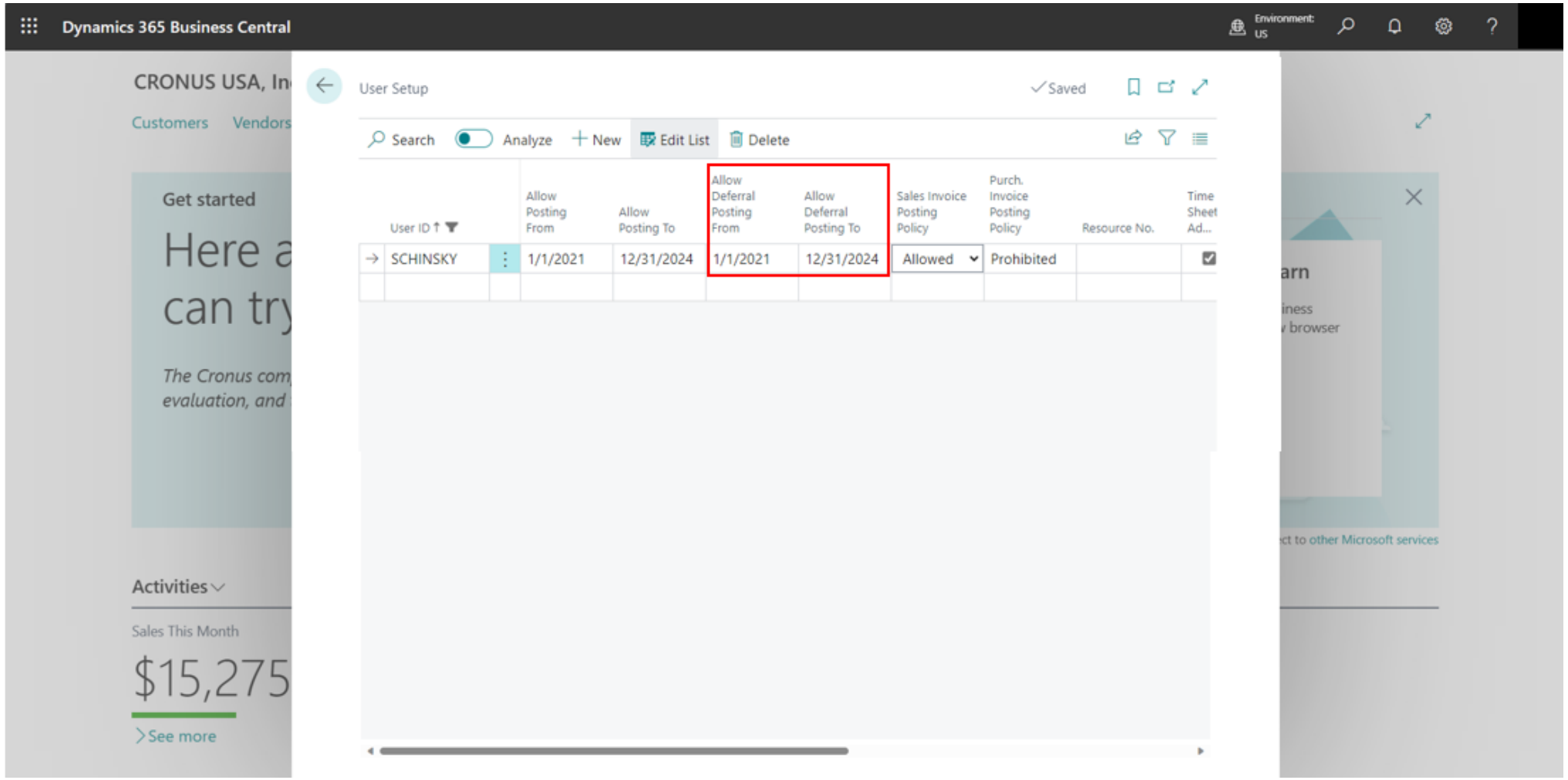
Posting Date: 011524

Posting Date: 1/15/2024

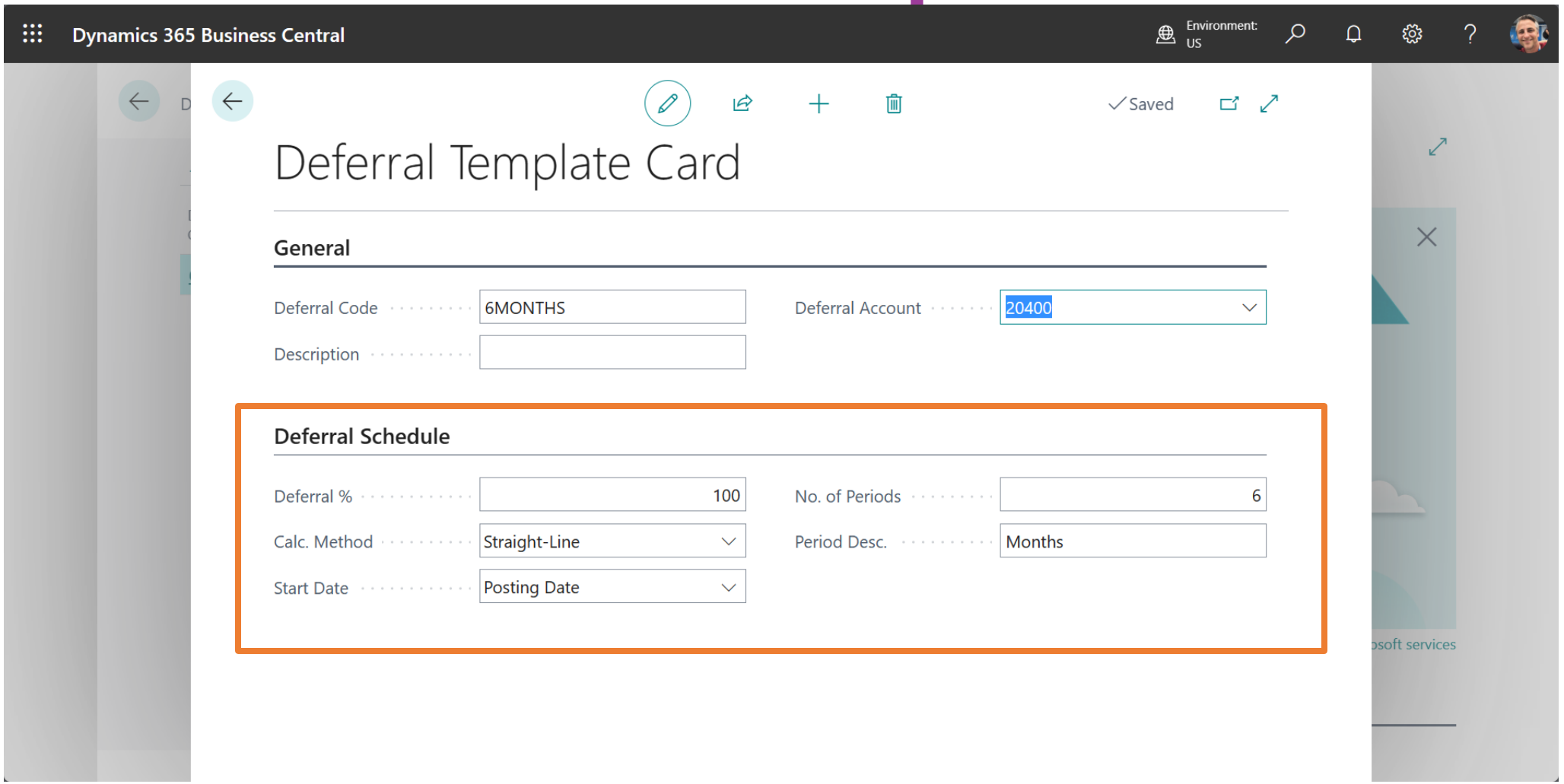
2 Allow posting of deferred revenue & expenses



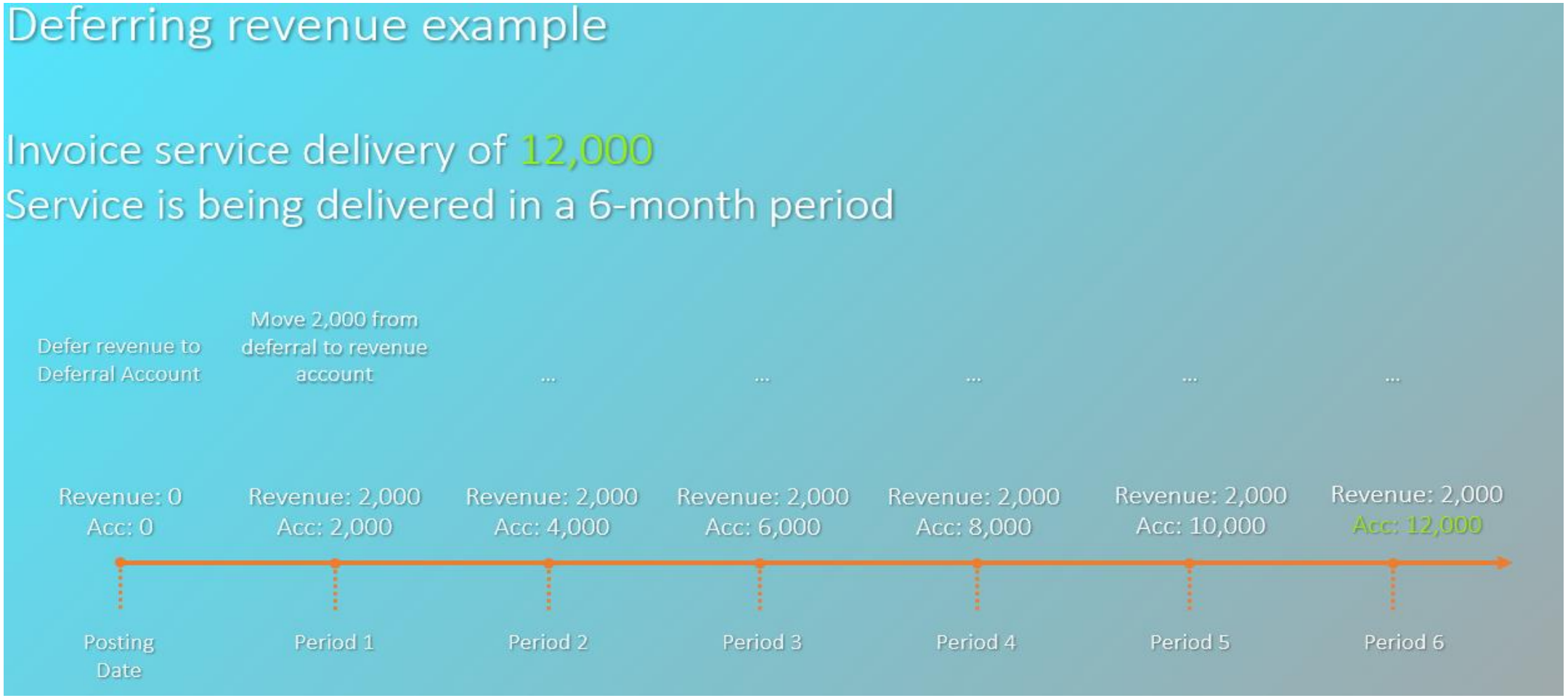
2 Override allowed deferral posting on specific users



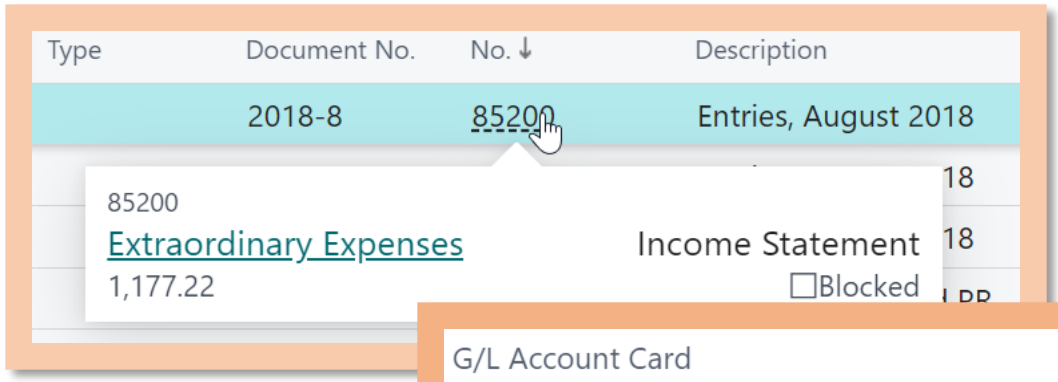
2 What is “Deferred revenue & expenses”?

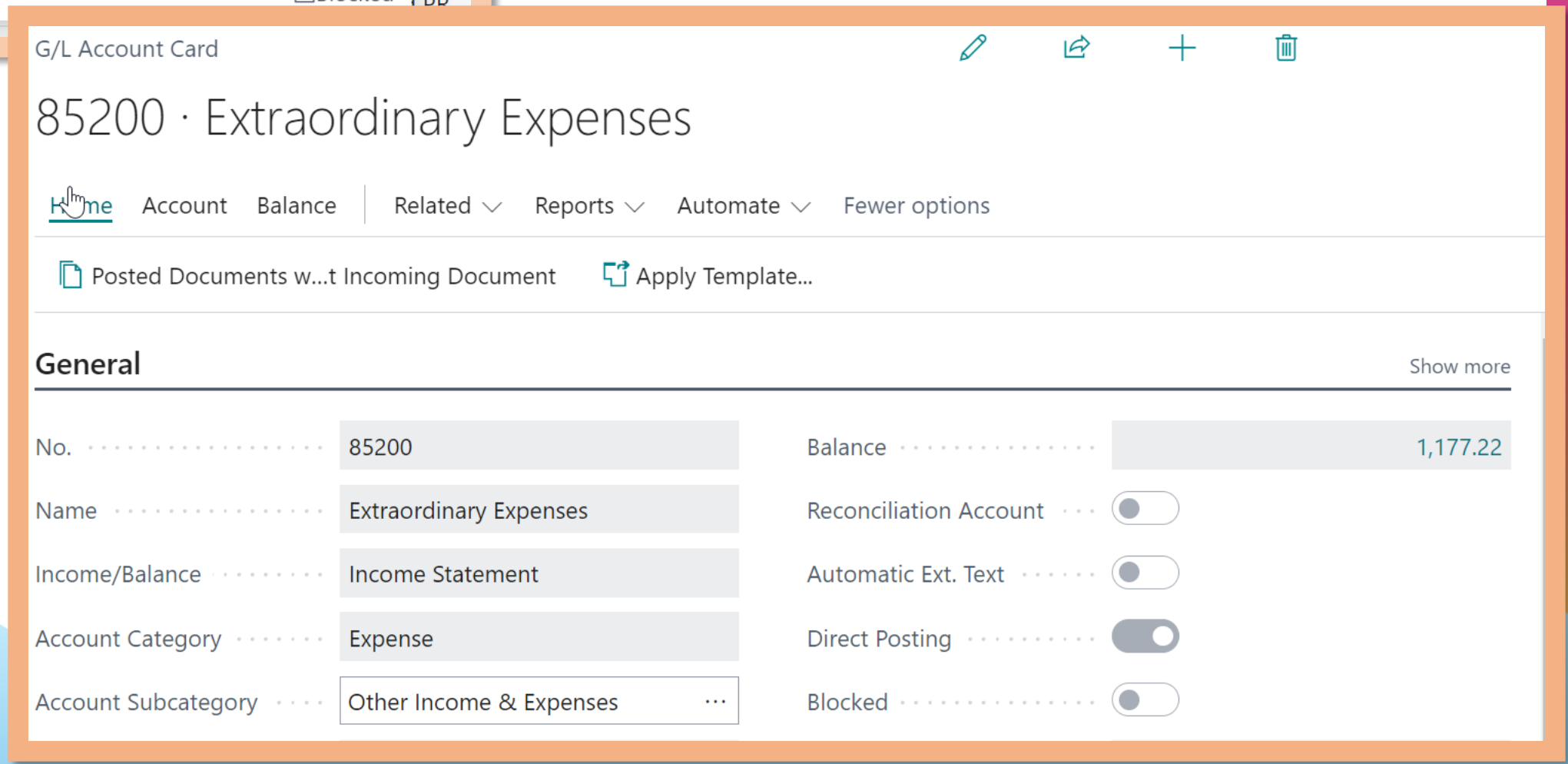


2 What is “Deferred revenue & expenses”?

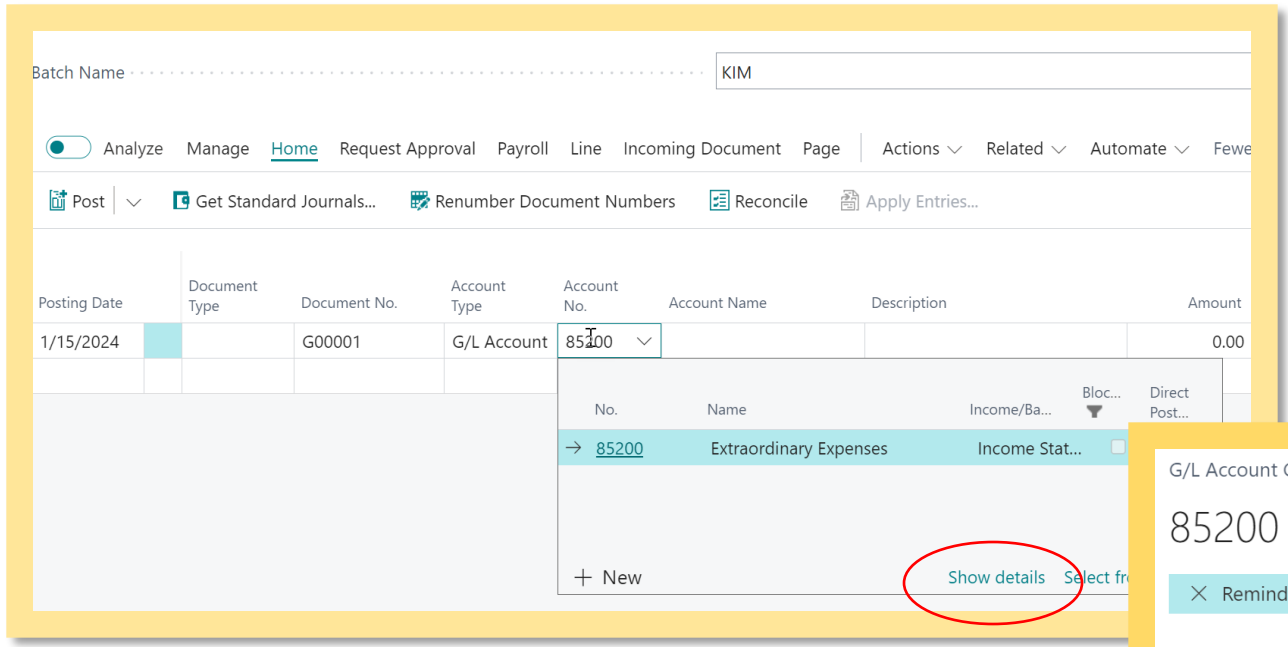


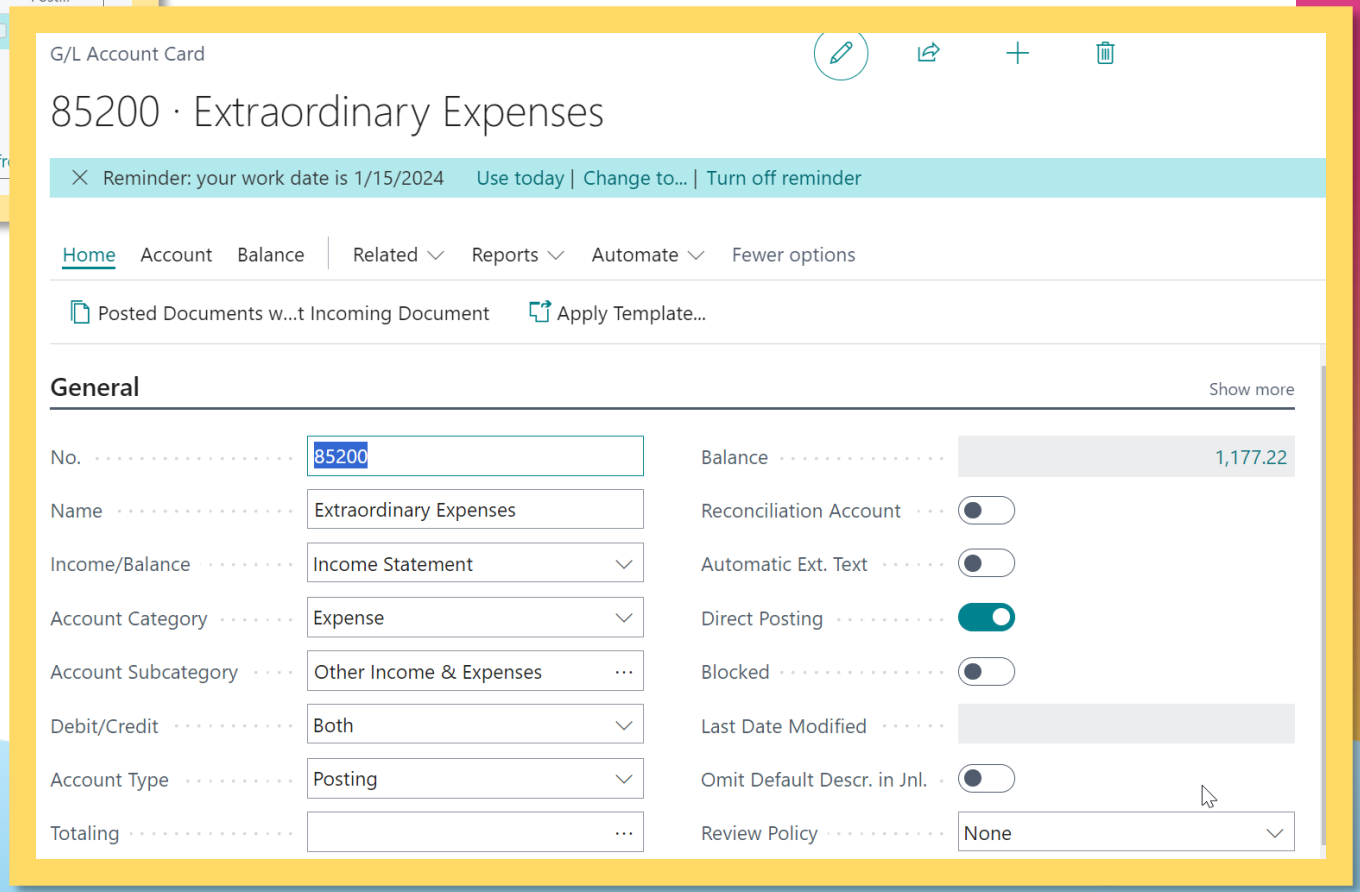
#3 Peeks


Type
Document No.
No.
Description
2018-8
85200
Entries, August 2018
85200
Extraordinary Expenses
1,177.22
Income Statement
Blocked

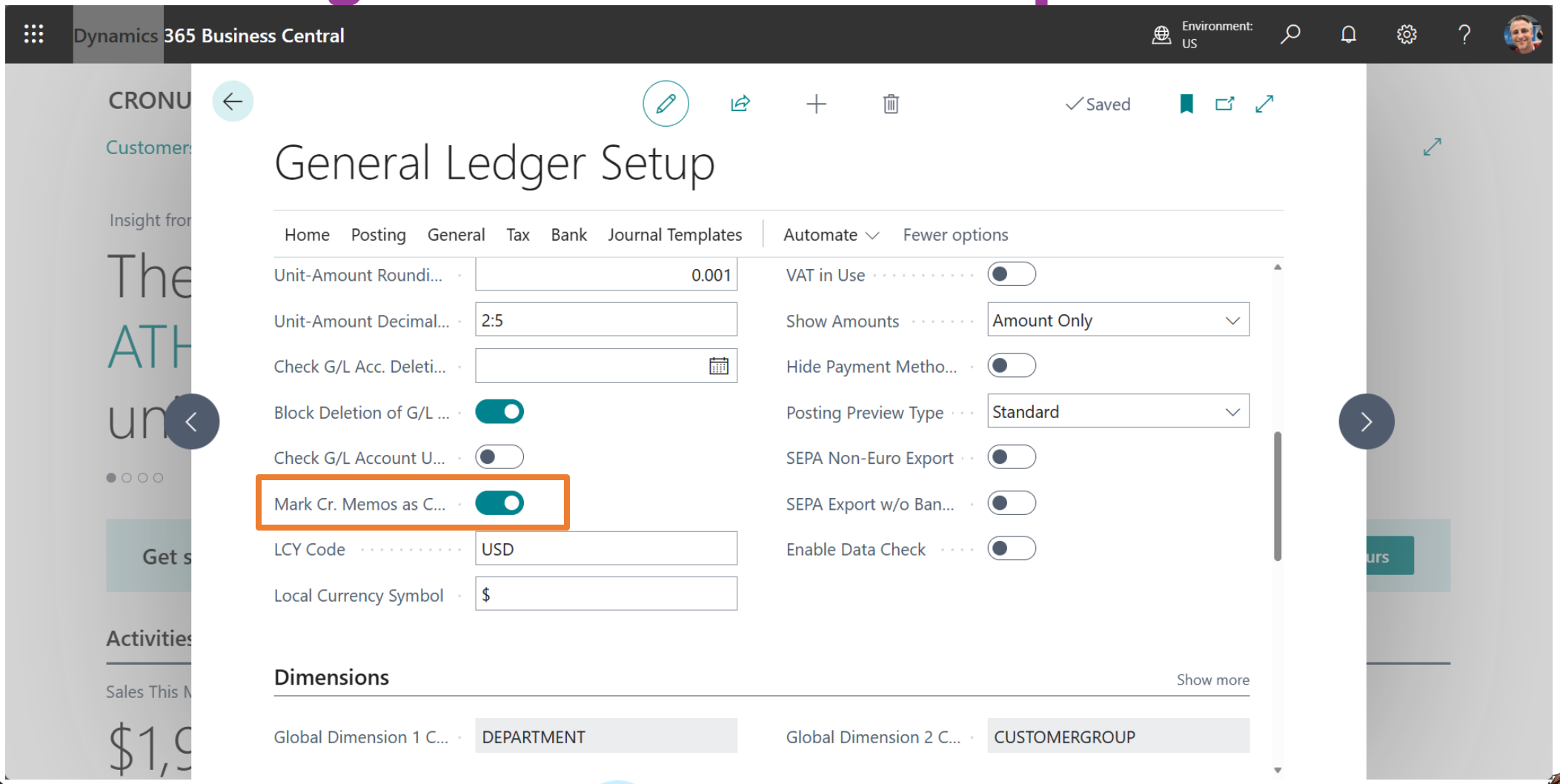

G/L Account Card
85200 · Extraordinary Expenses
Home
Account
Balance
Related
Reports
Automate
Fewer options
Posted Documents w...t Incoming Document
Apply Template...
General
Show more
No.
85200
Name
Extraordinary Expenses
Income/Balance
Income Statement
Account Category
Expense
Account Subcategory
Other Income & Expenses
Balance
1,177.22
Reconciliation Account
Automatic Ext. Text
Direct Posting
Blocked

#3 More Peeks


Batch Name
KIM
Analyze
Manage
Home
Request Approval
Payroll
Line
Incoming Document
Page
Actions
Related
Automate
Fewe
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


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
Show more
No.
85200
Name
Extraordinary Expenses
Income/Balance
Income Statement
Account Category
Expense
Account Subcategory
Other Income & Expenses
Debit/Credit
Both
Account Type
Posting
Totaling
Balance
1,177.22
Reconciliation Account
Automatic Ext. Text
Direct Posting
Blocked
Last Date Modified
Omit Default Descr. in Jnl.
Review Policy
None

4 Determining how Credit Memos are posted



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

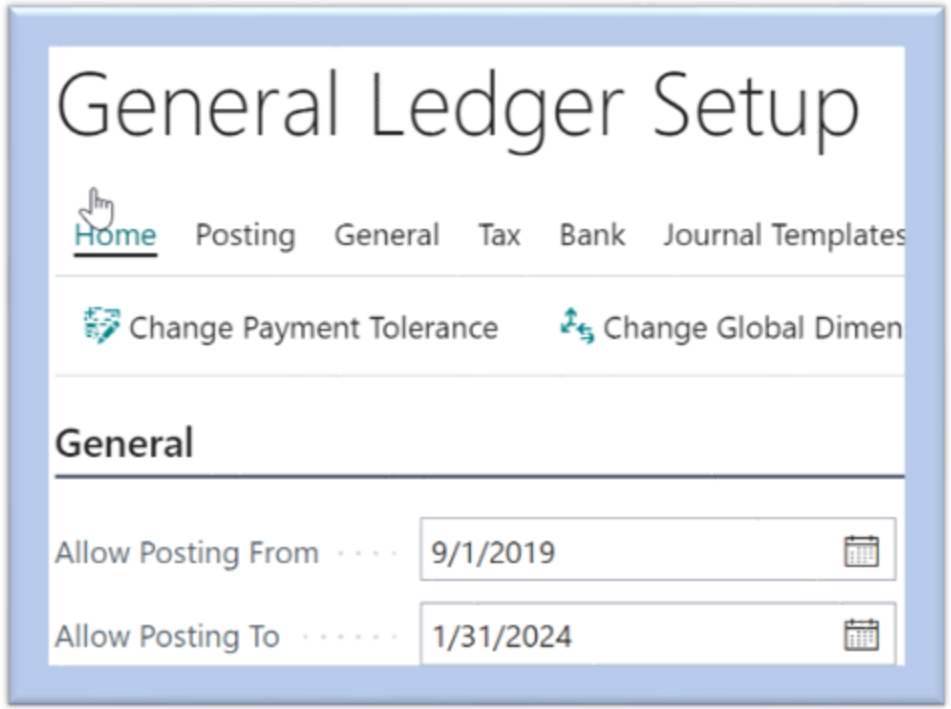
"Mark Cr. Memo as Correction"
enabled

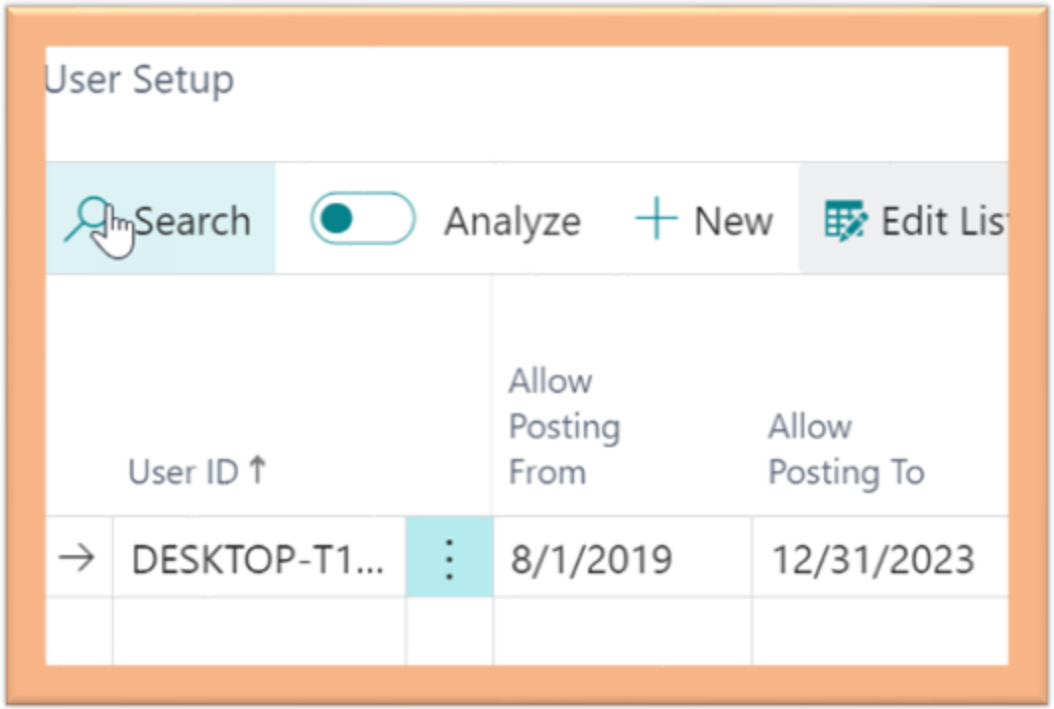
	Debit	Credit
Invoice	1,000	
Cr. Memo	-1,000	

Customer account

Some countries have this regulatory requirement

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





#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 — Saved

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 — Saved

1022 · Progressive Home Furnishings

Posting | Release | Prepare | Request Approval | Invoice | More options

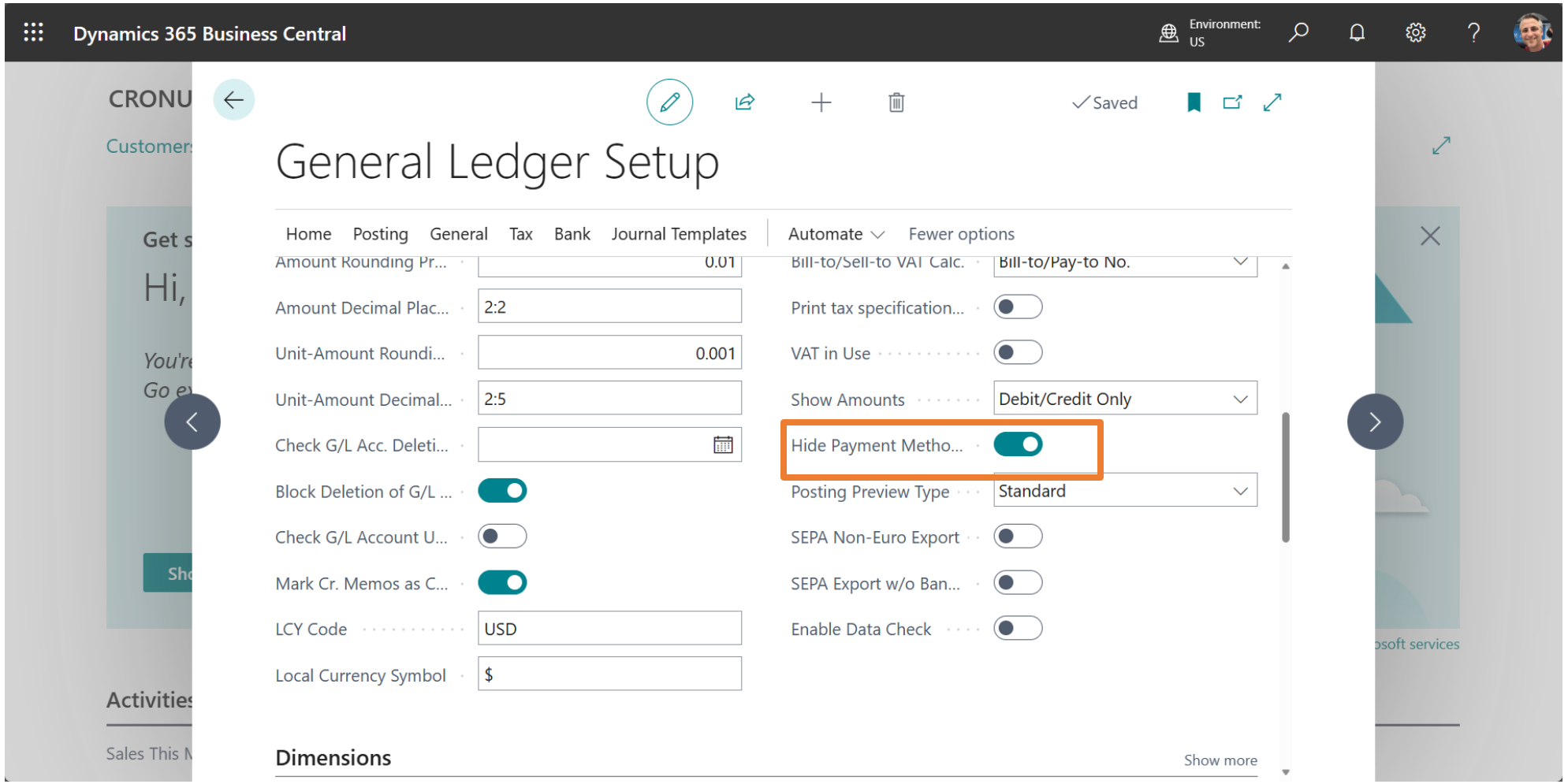
General — Show more

Vendor Name: Progressive Home Furnishings
Contact: Mr. Michael Sean Ray
Posting Date: 1/25/2023
Due Date: 1/31/2023
Vendor Invoice No.:
Status: Open

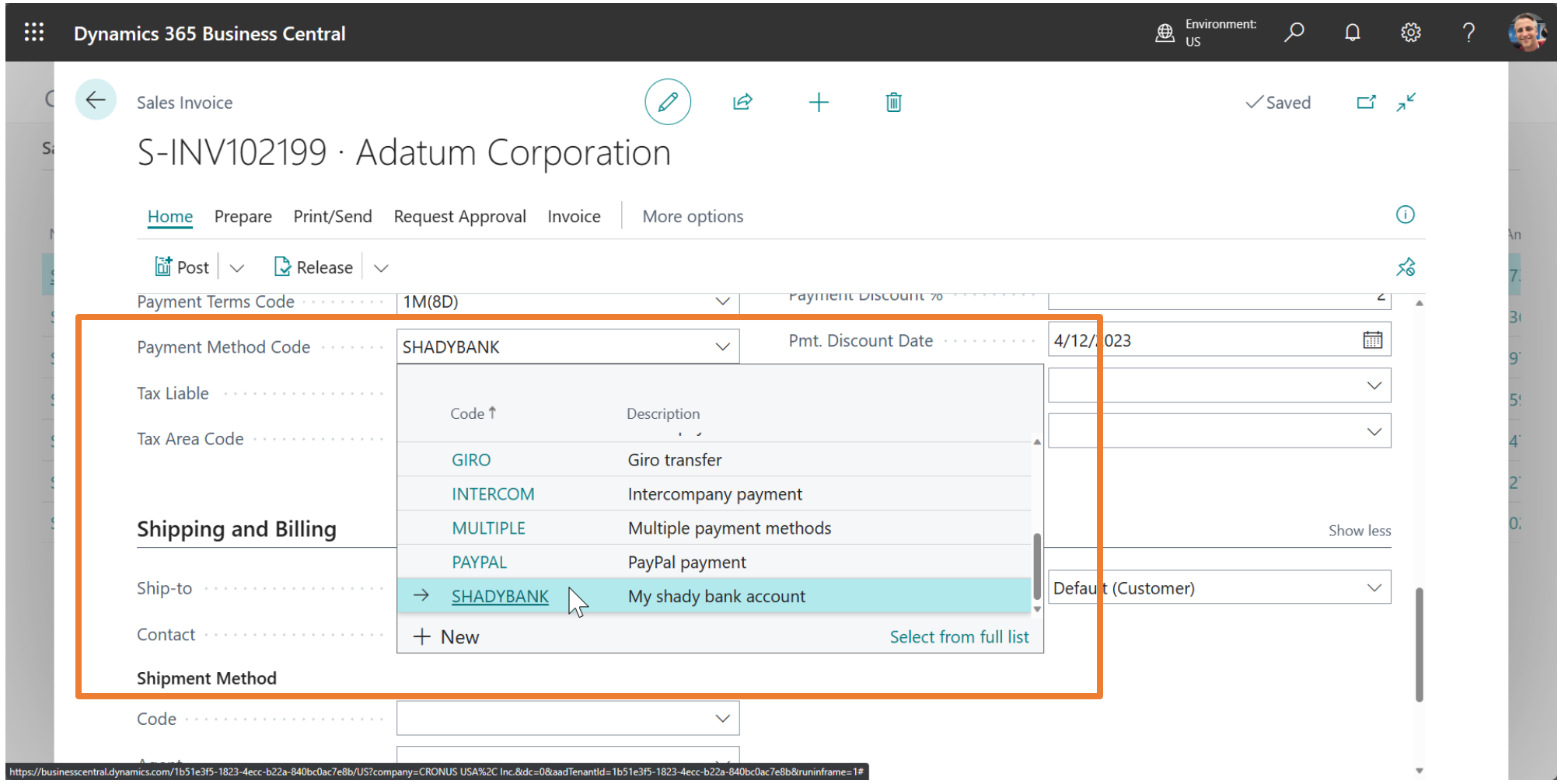
Lines | Manage | Line | Fewer options

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				

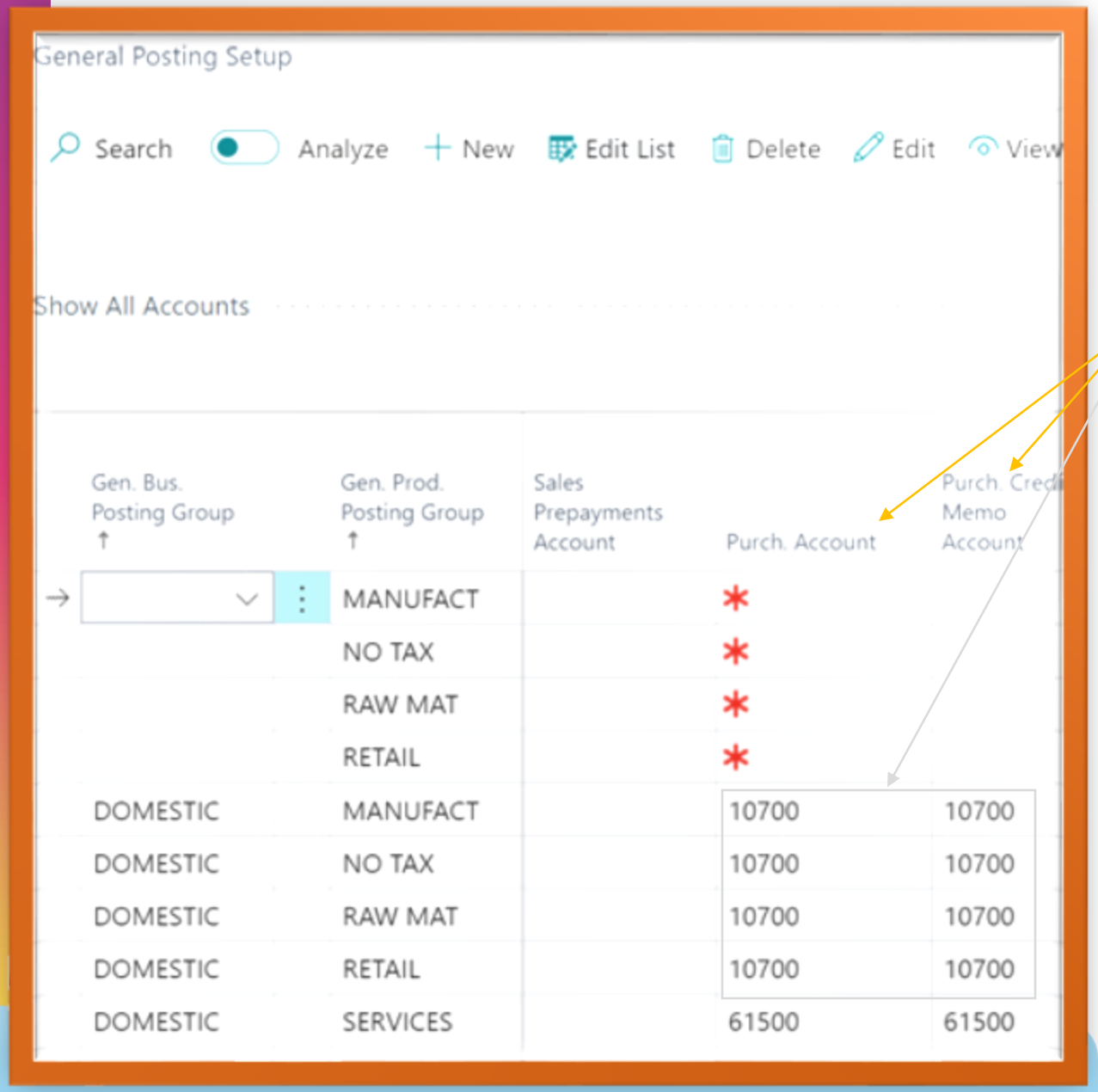
#6 Ensuring people do not change payment methods



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



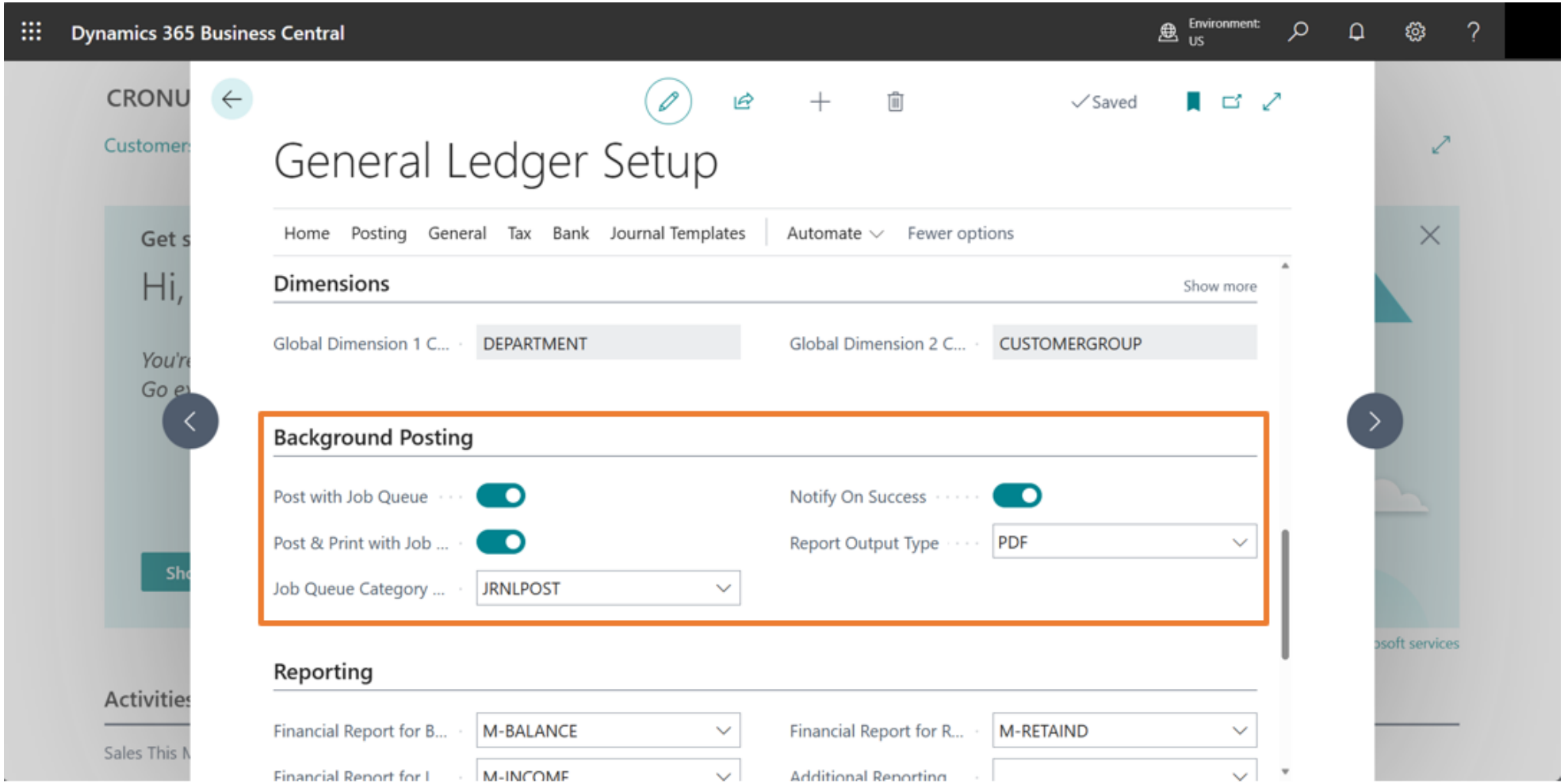
#7 Cronus data?



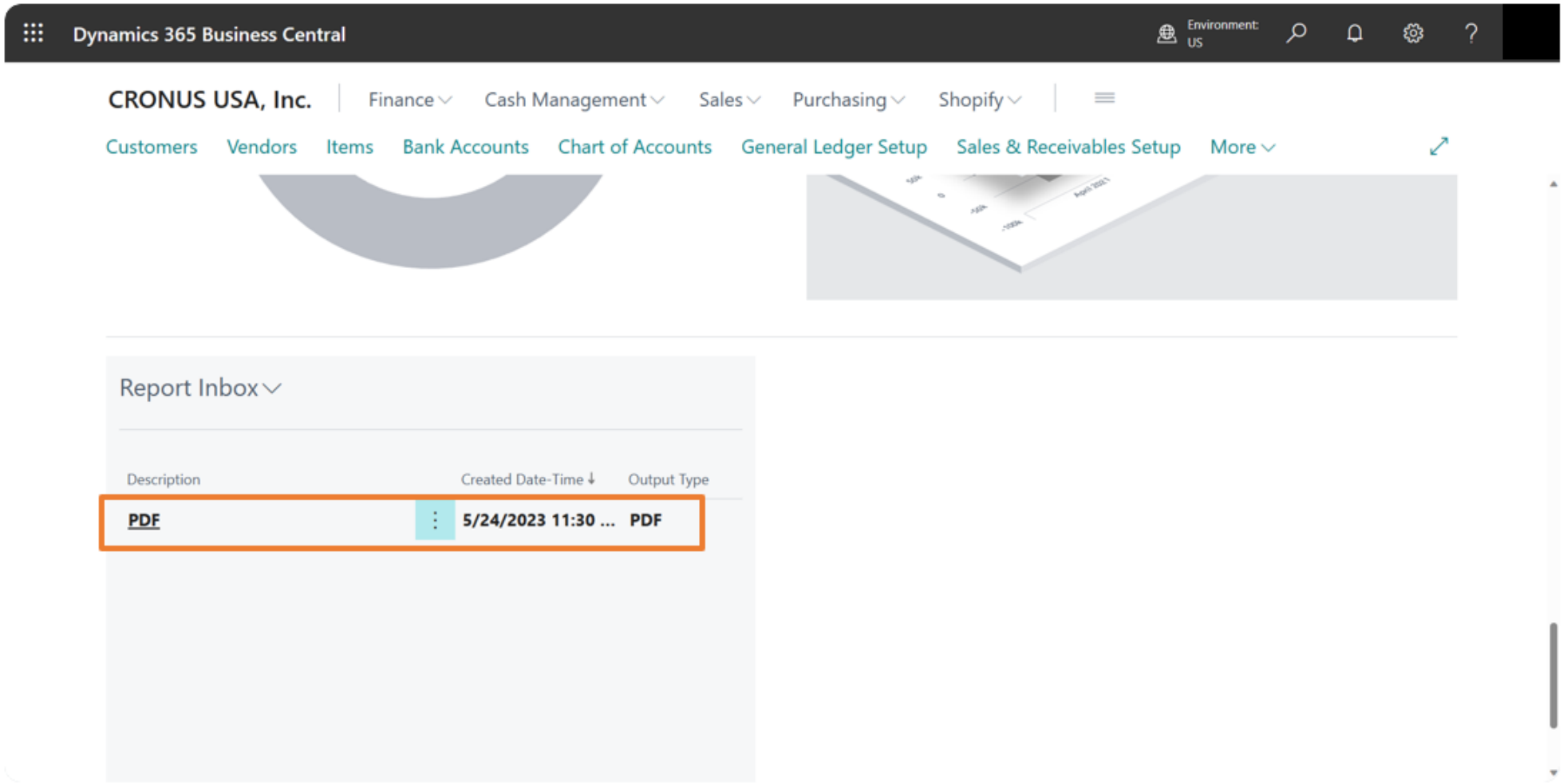
Setup for purchase accounts is wrong

Do not use production data unless you fix General Posting Setup

#8 Use Background Posting to boost productivity



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



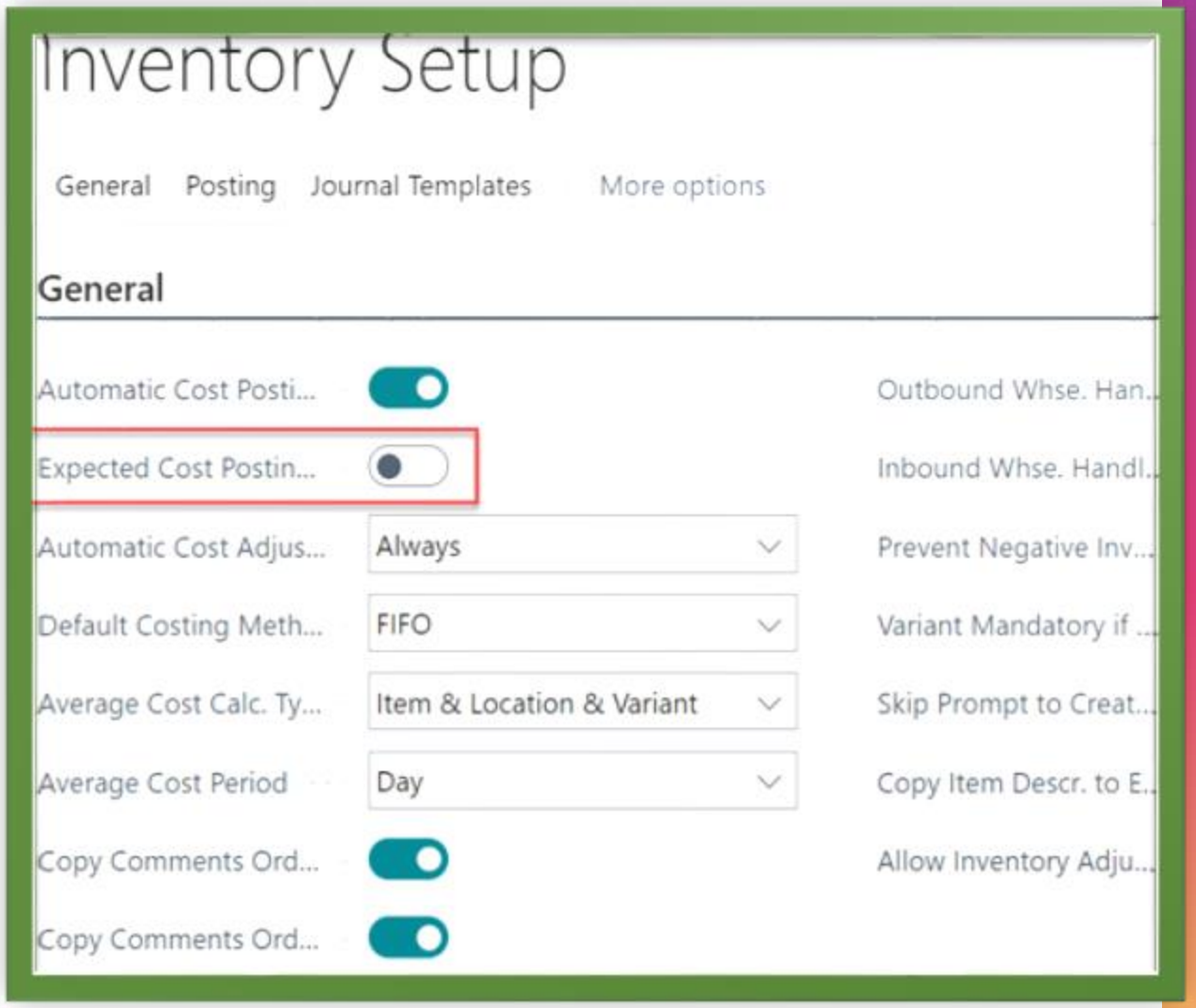
#9 Receipt Entries?

Posting a PO Receipt:

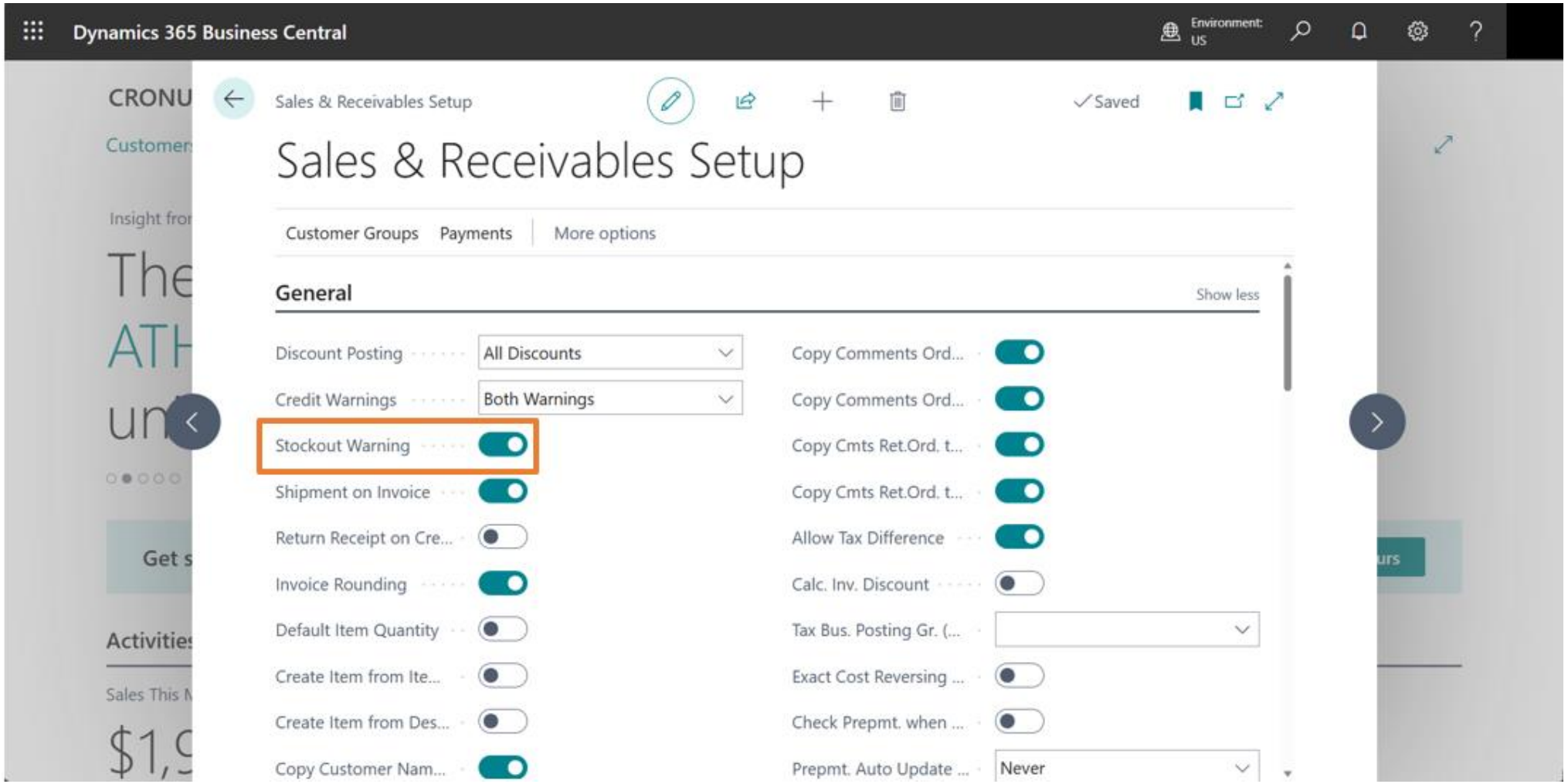
Debits	Interim Inventory
Credits	Accrued Acct Pay

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

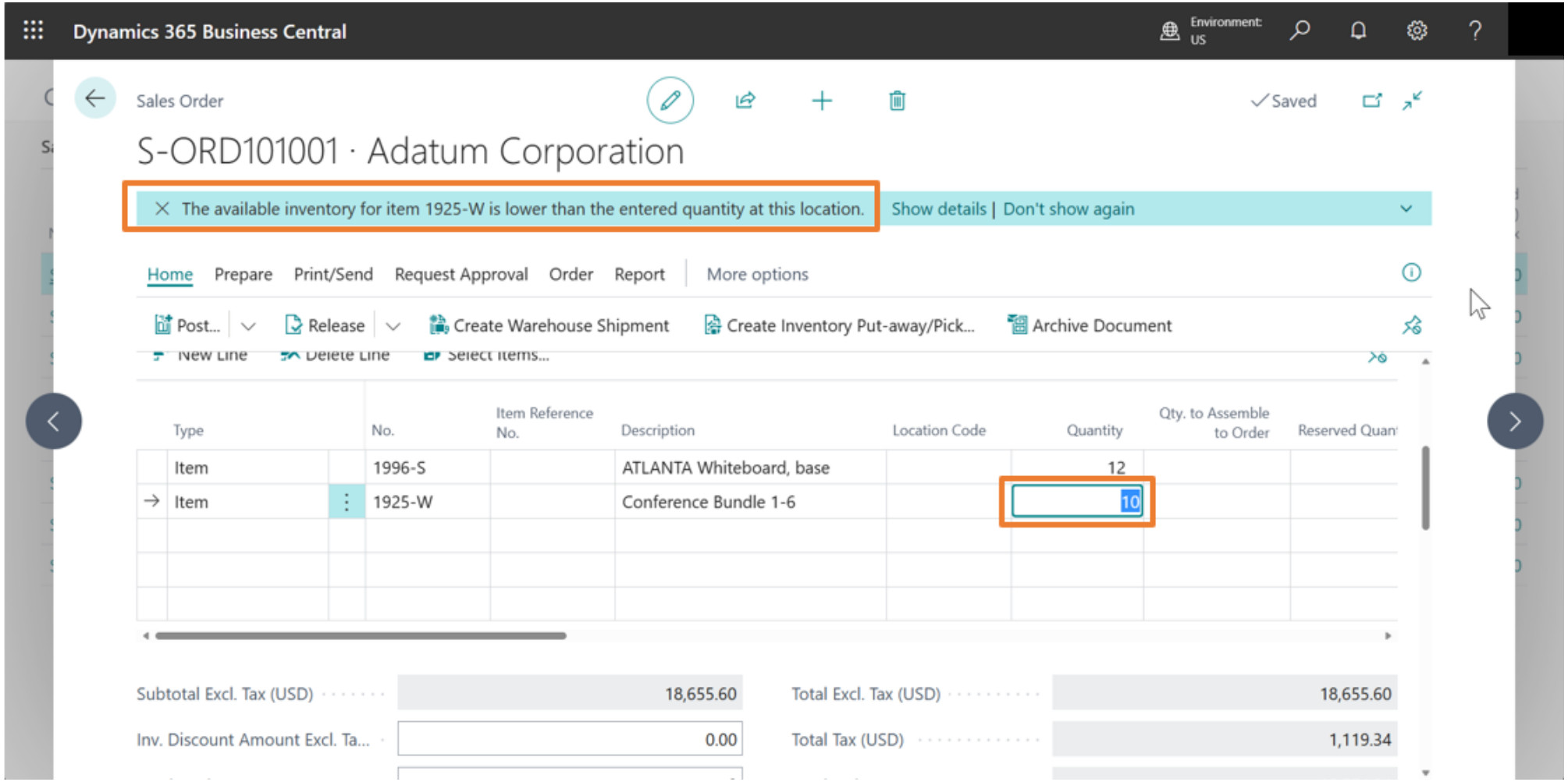
Also, posts an accrual for inventory costs on sales shipments.



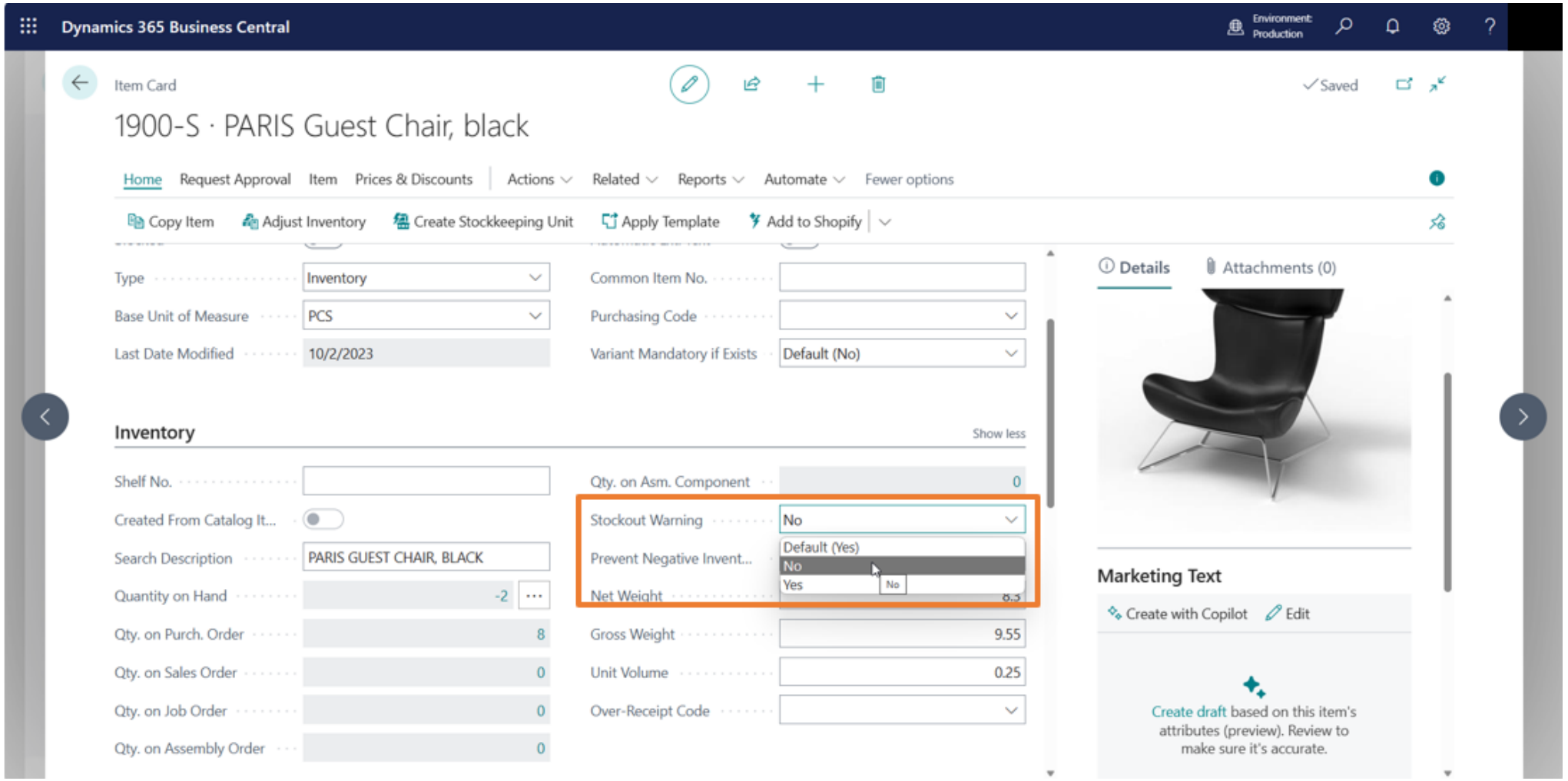
#10 *Warn* about negative inventory



#10 *Warn* about negative inventory



#10 Override on the items

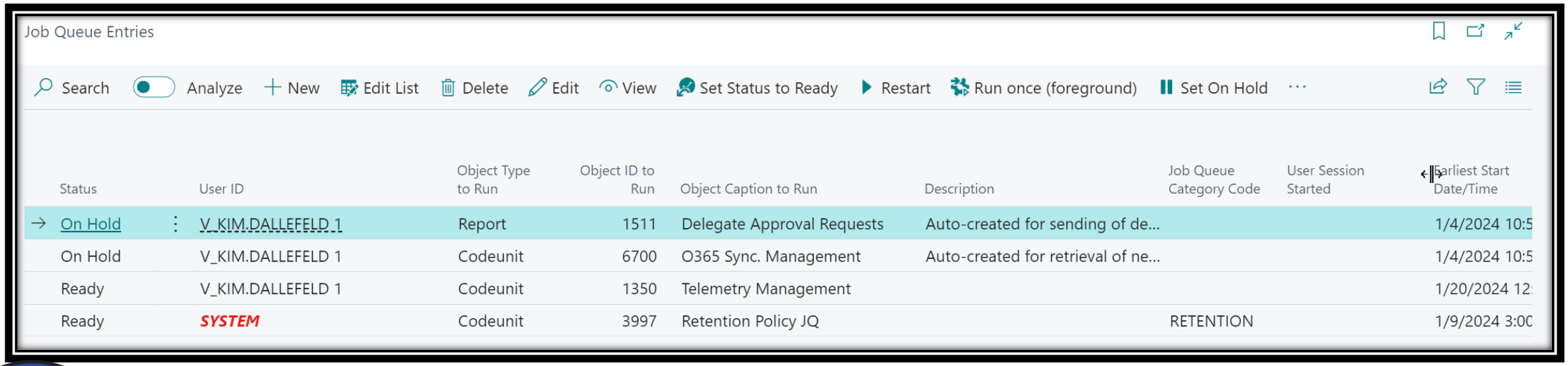


#11 Use Job Queue when?

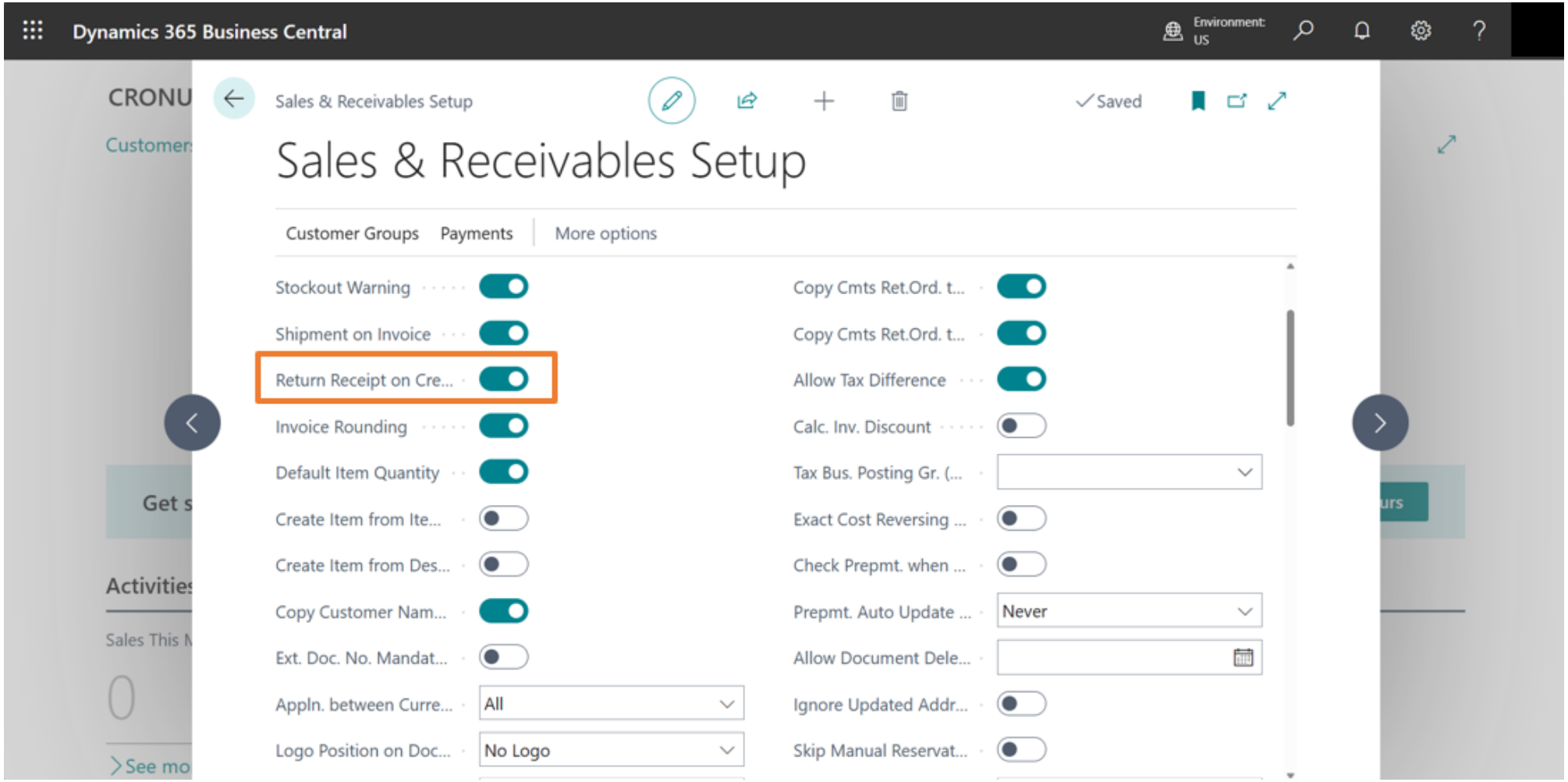
Job queue is a feature to execute programs on a schedule.

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

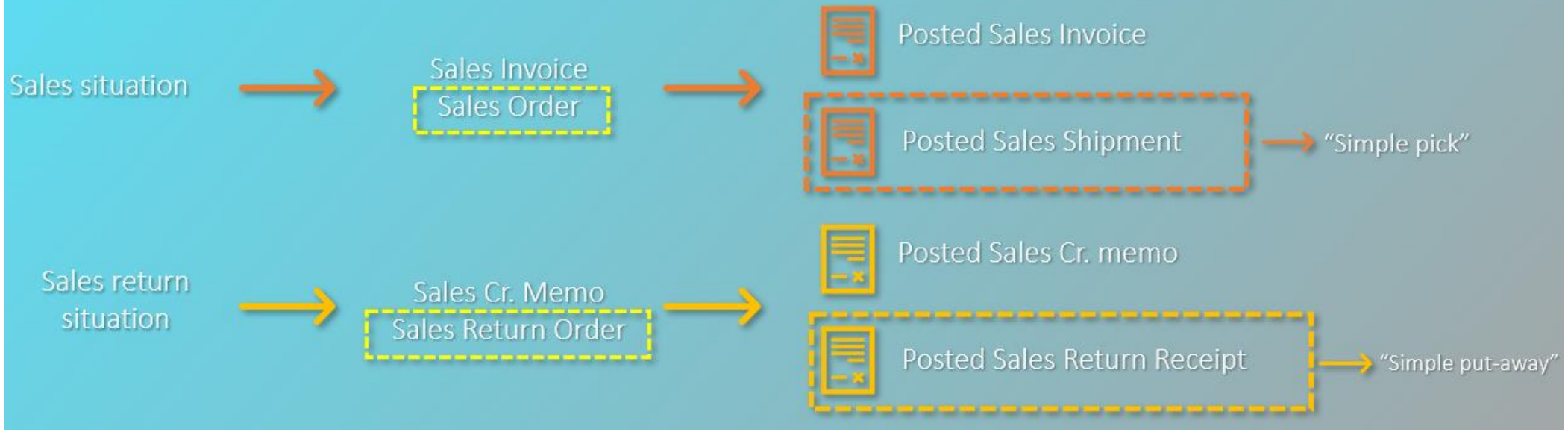


#12 Create a sales receipt document when posting credit memos



#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?



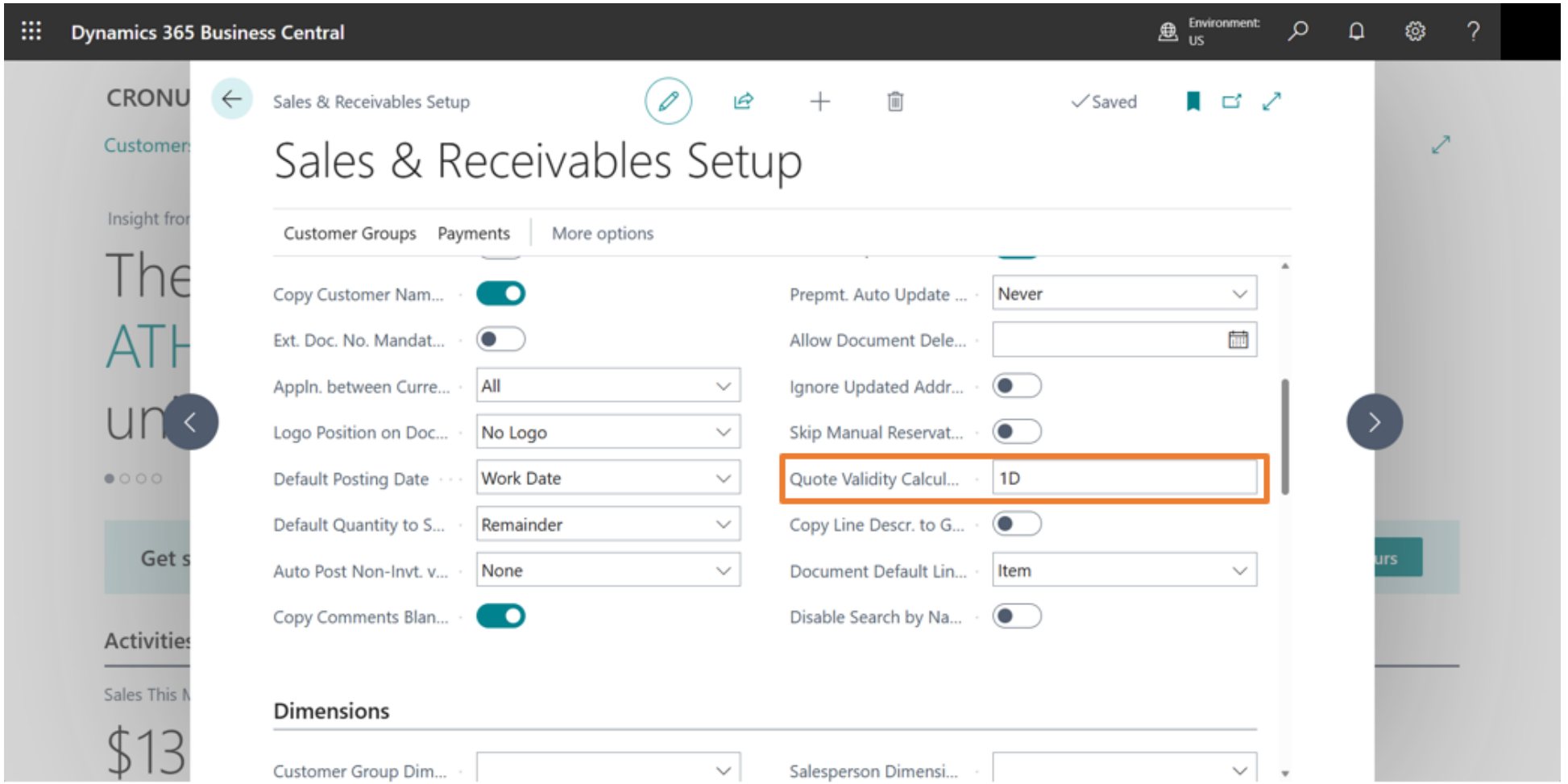
#13 No Service Mgt or Manufacturing?

This is licensed based

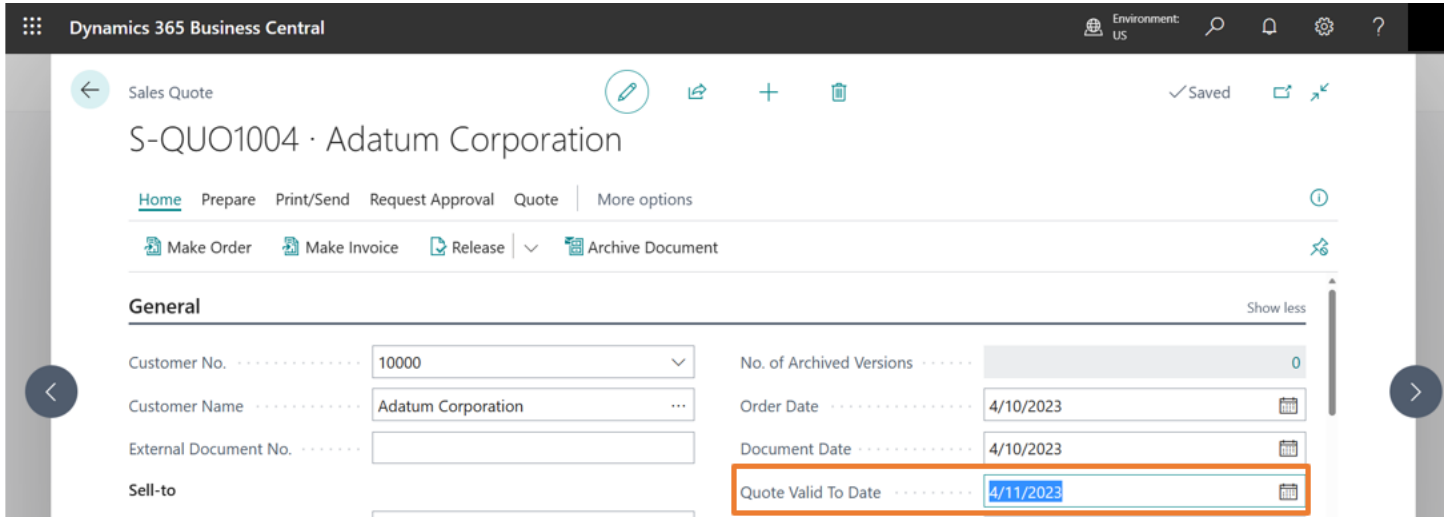
Essential license does not have Service or Manufacturing

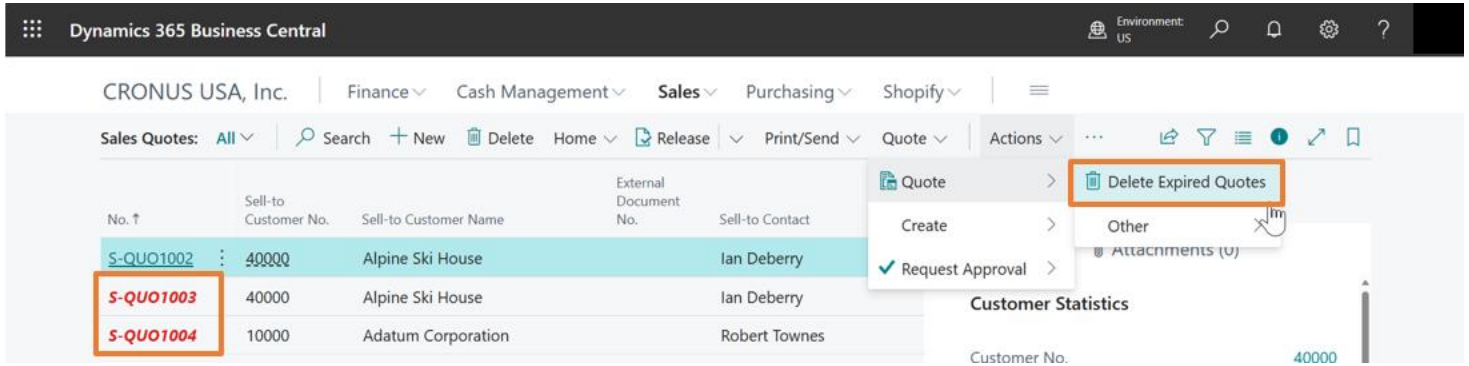
Premium license is required

#14 Managing expired sales quotes

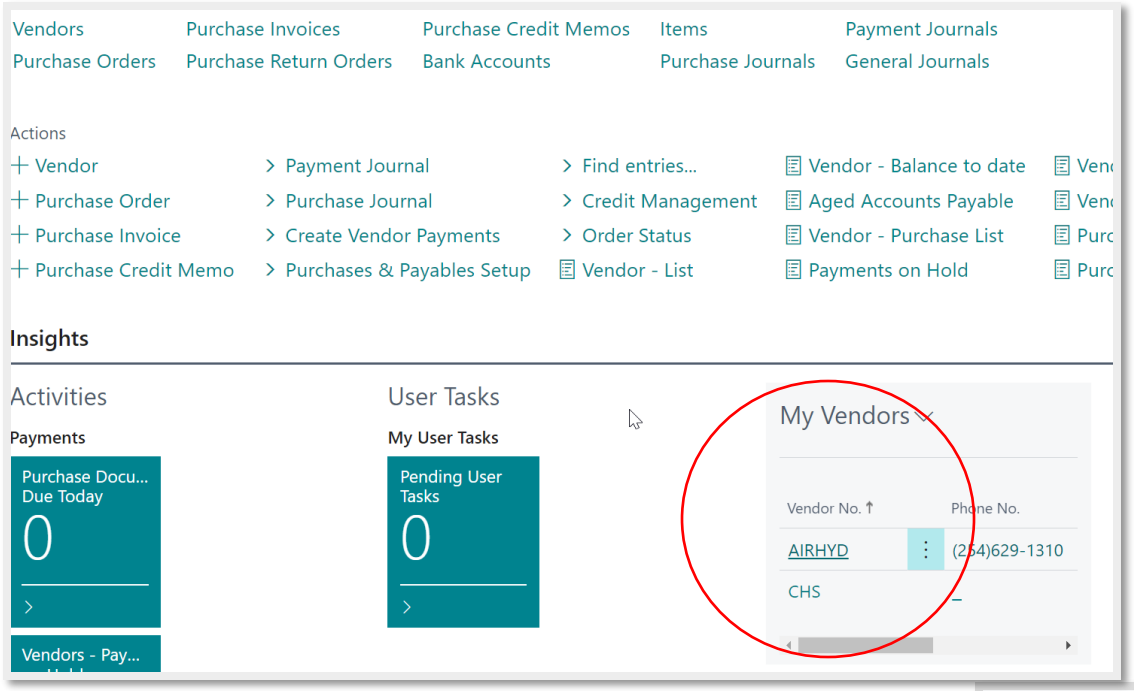


#14 Quote Valid To Date automatically calculated and Delete expired quotes (consider job queue)



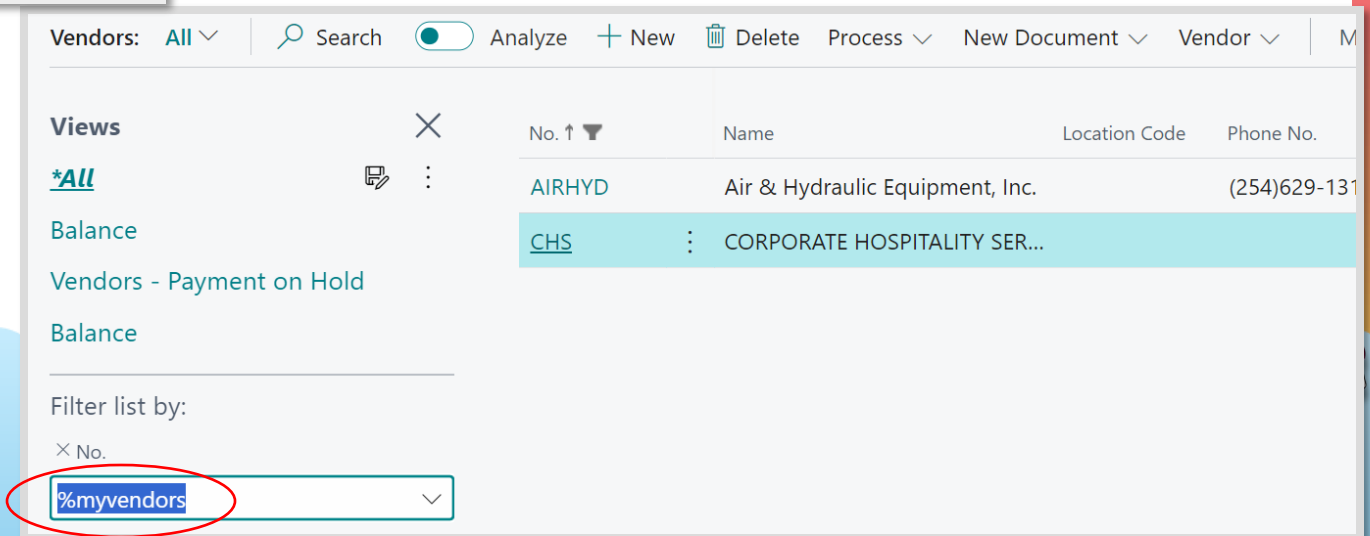


#15 Mycustomer, myvendors, myitems?



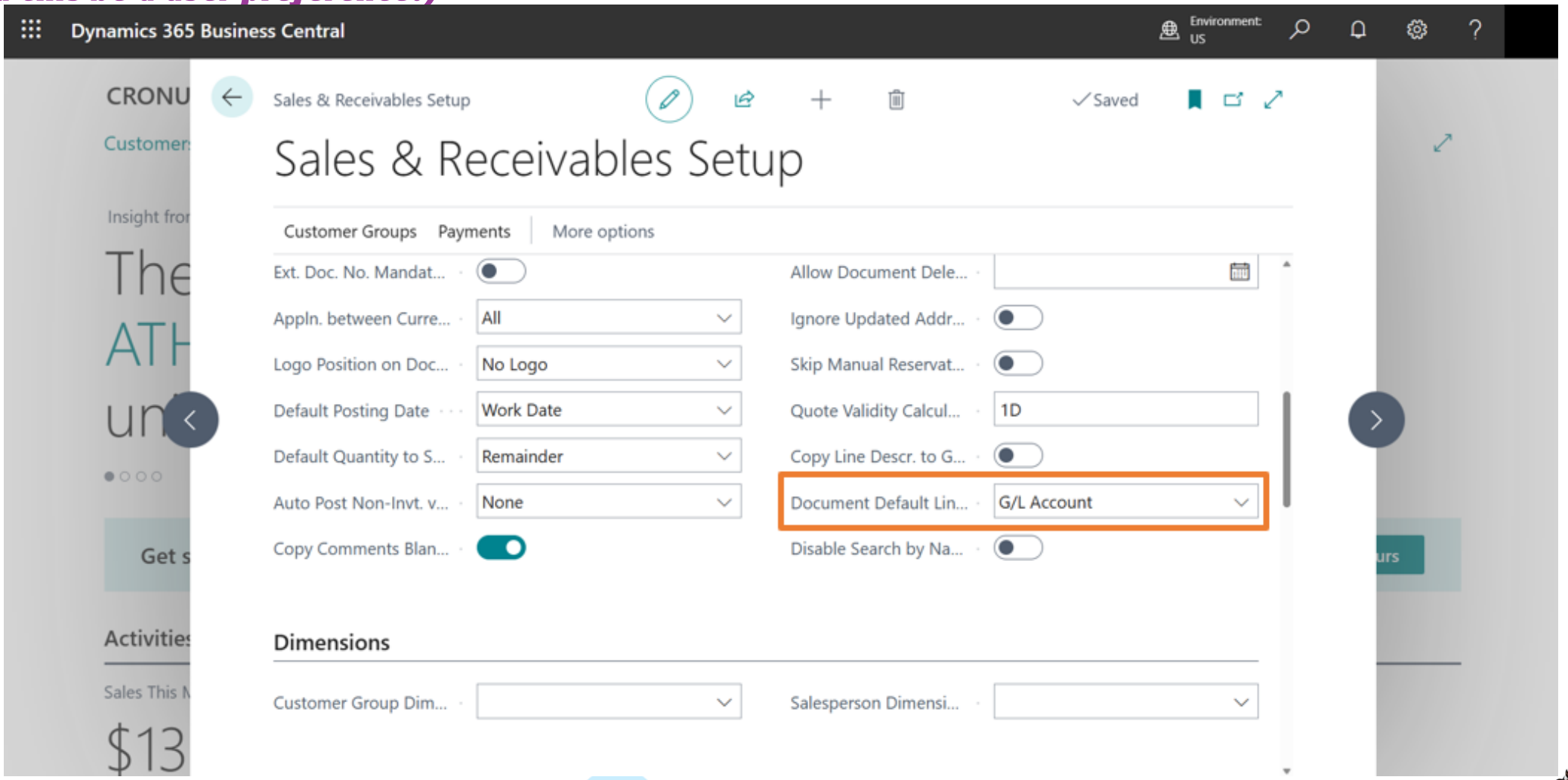
You manage the list, adding and deleting as desired.

Use the shortcut %myxxxxxx for quick filtering.

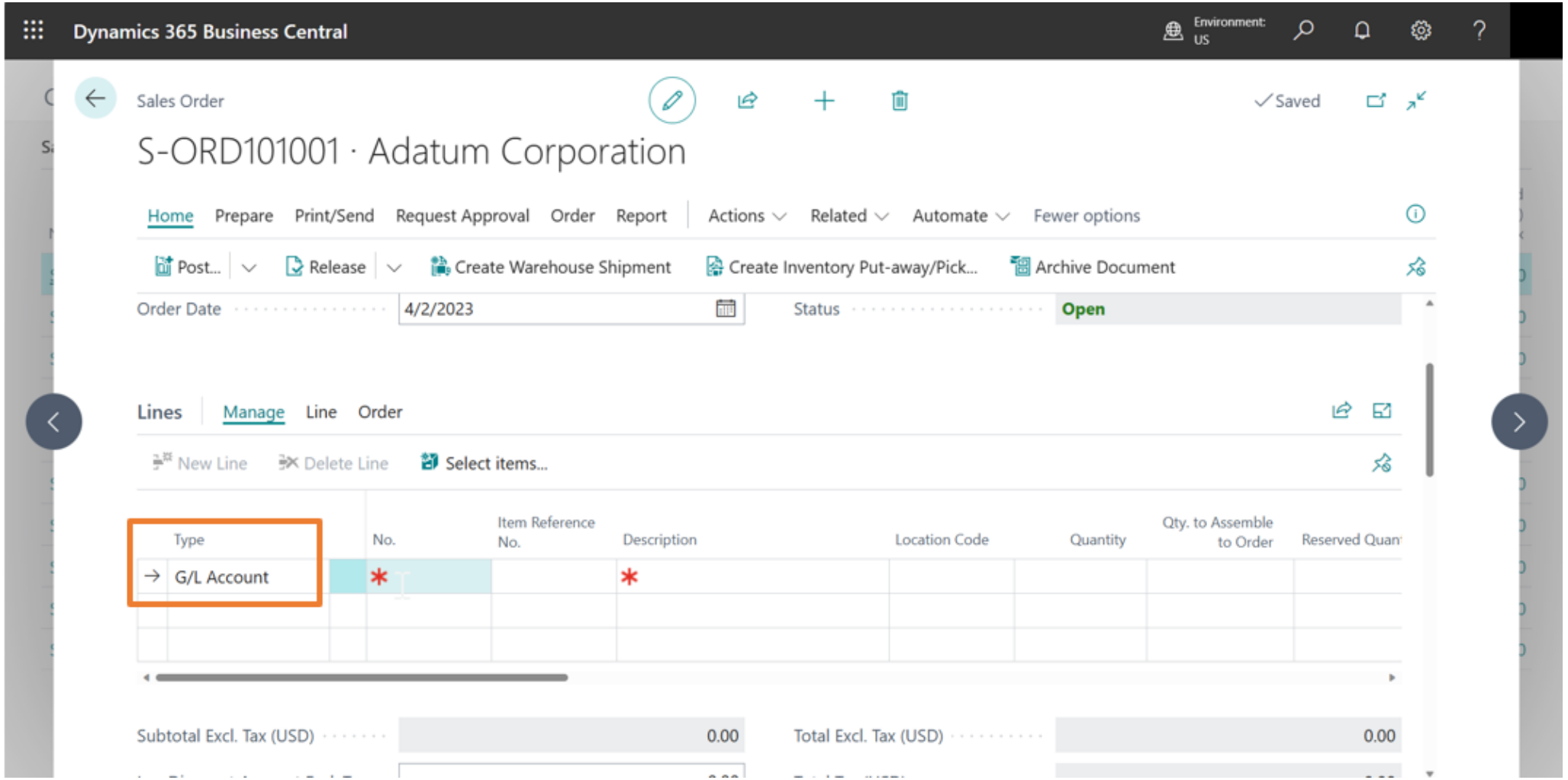


#16 Defaulting the line type to most used

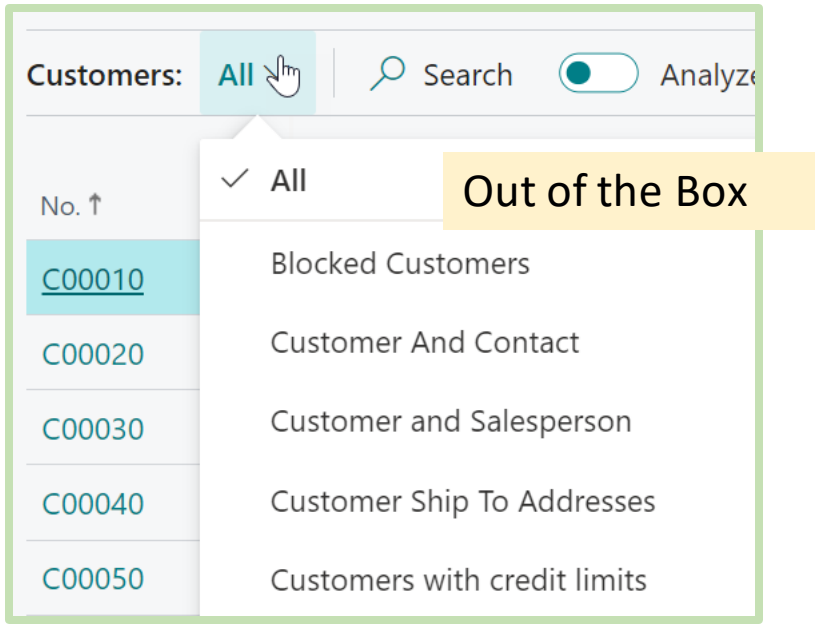
(Should this be a user preference?)



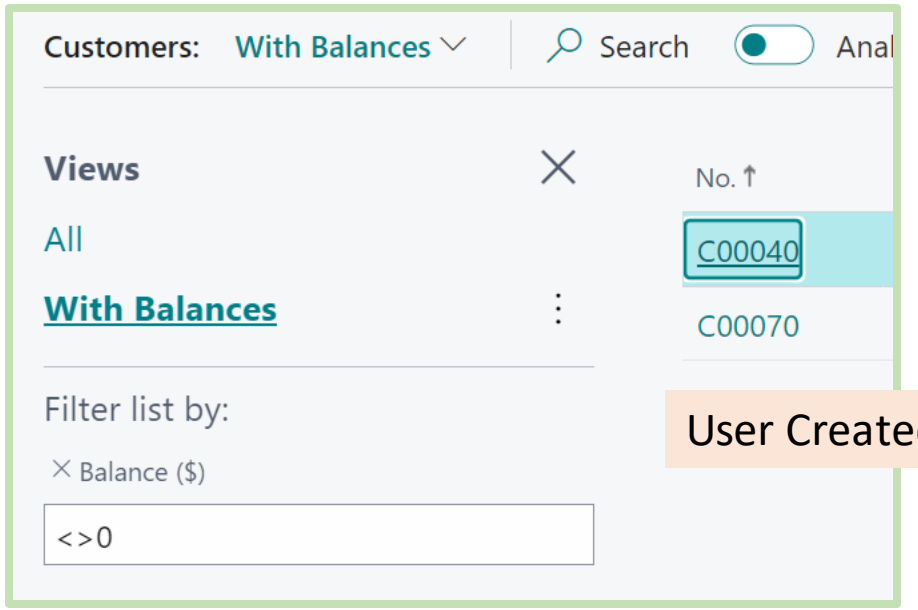
#16 Example of defaulting type to G/L Account



#17 Same filters over and over?

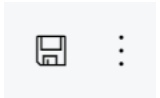


Out of the Box



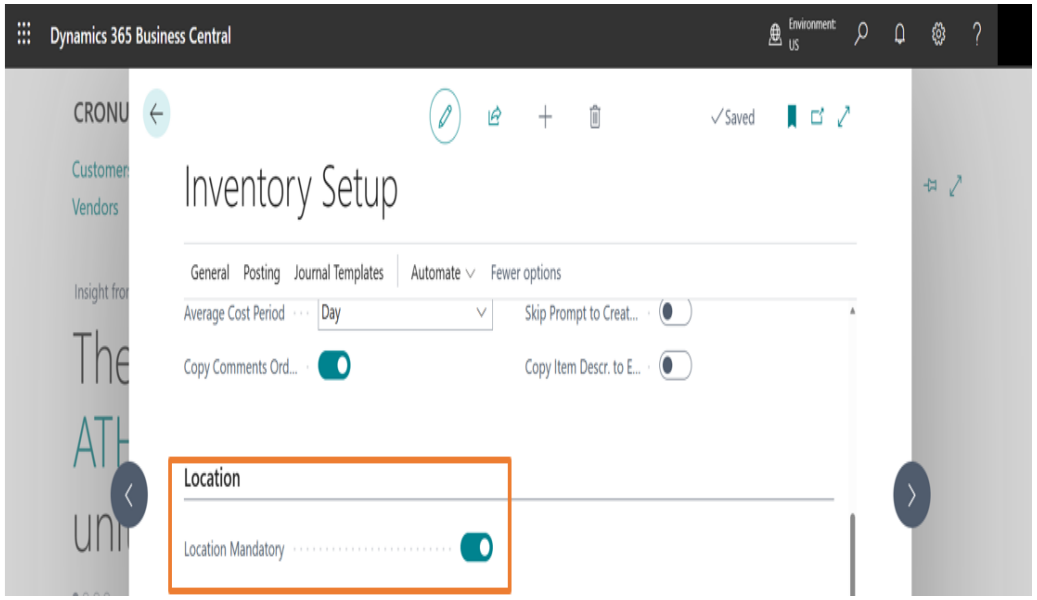
User Created

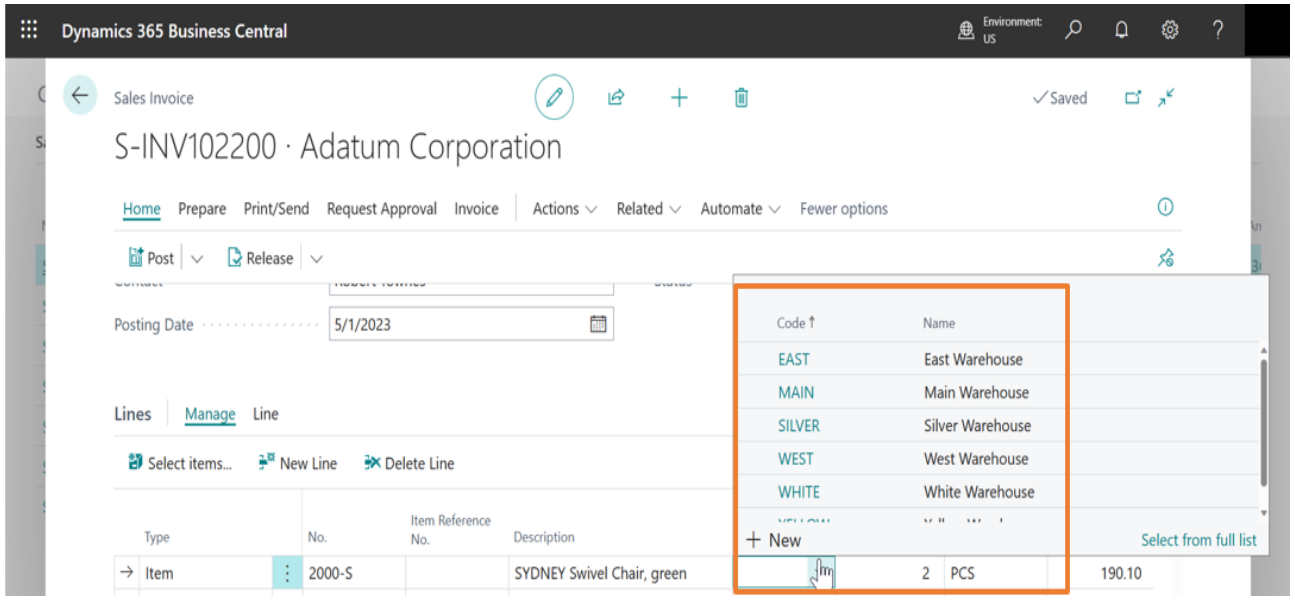
1. After filtering
2. Choose the Save icon
3. Give your filter a name
4. Select from either of the above



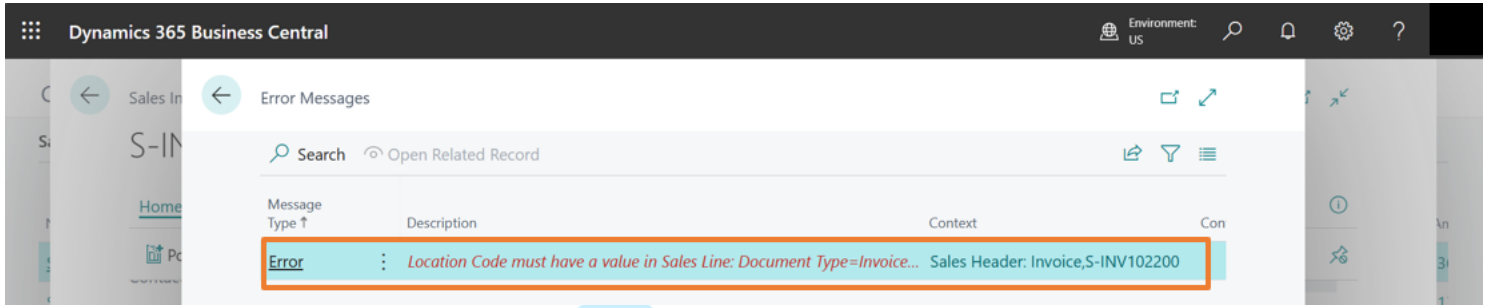
PS - %myxxxxxx works here also

#18 Don’t allow posting without Location code



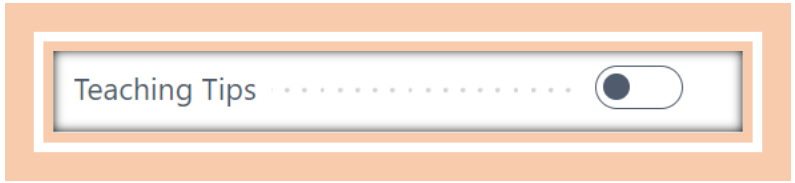


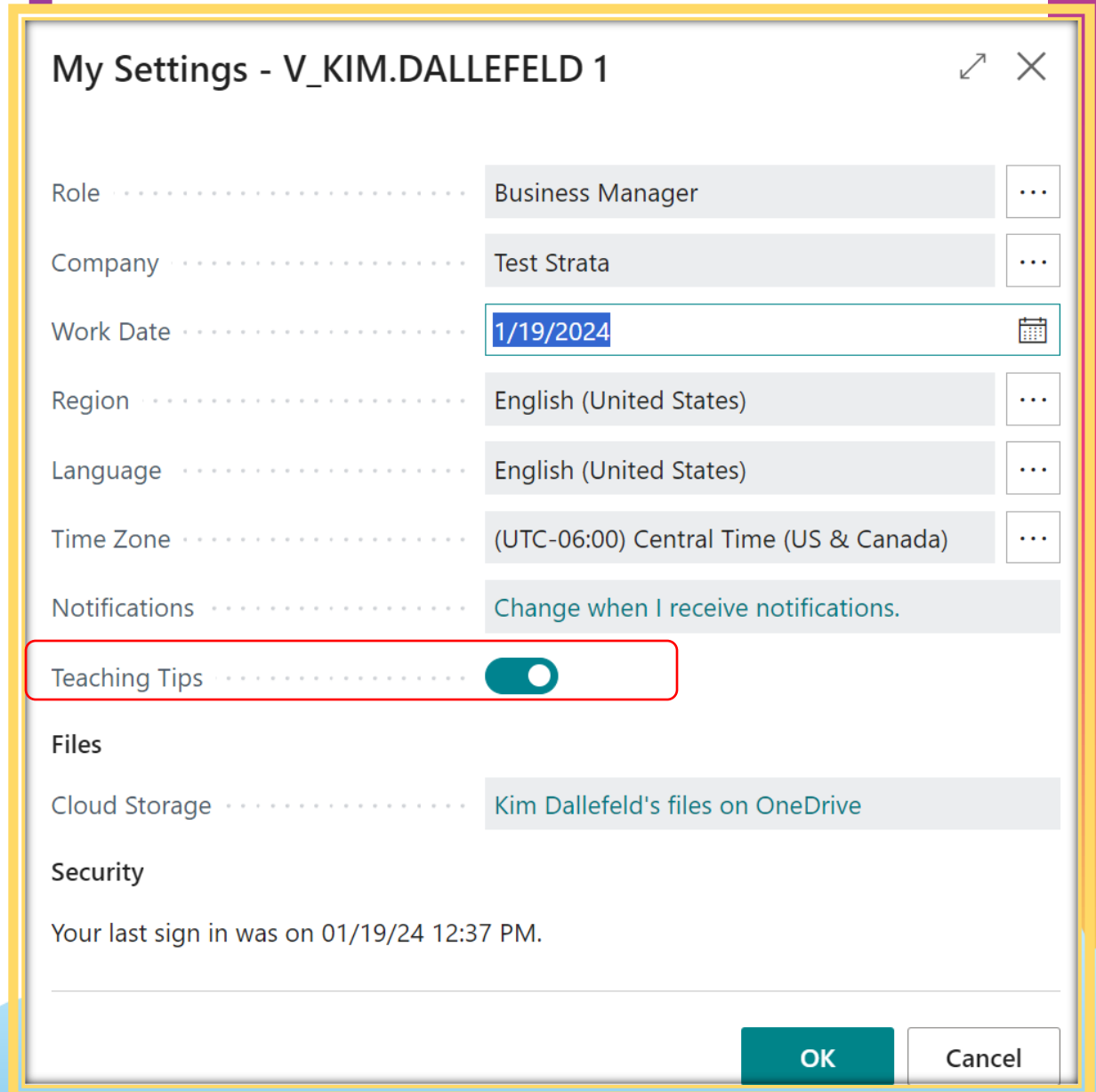
If you have locations, you probably want to use them, for consistency



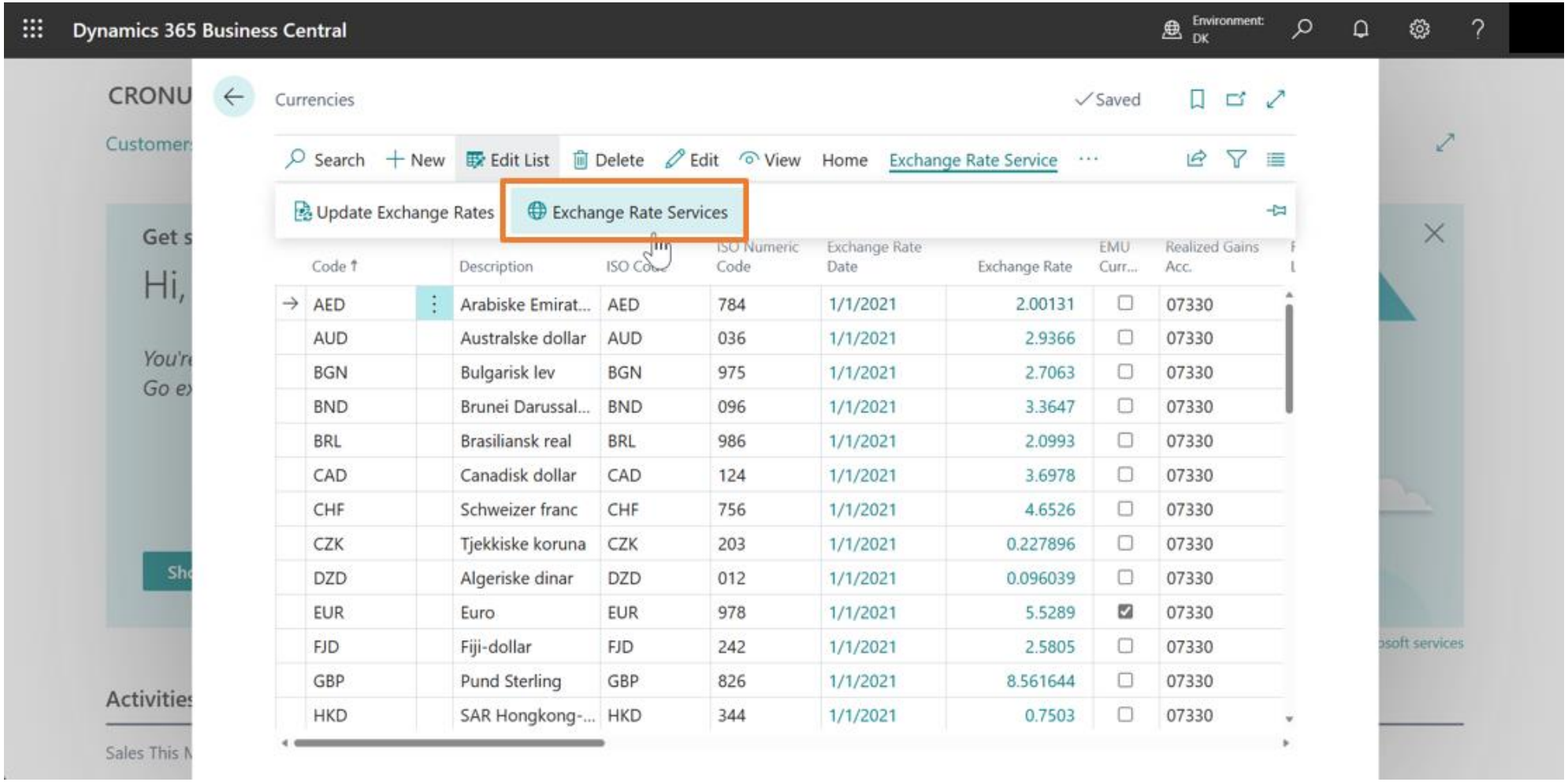
#19 Stop Pesky Popups

Teaching Tips –
My Settings
Toggle Off



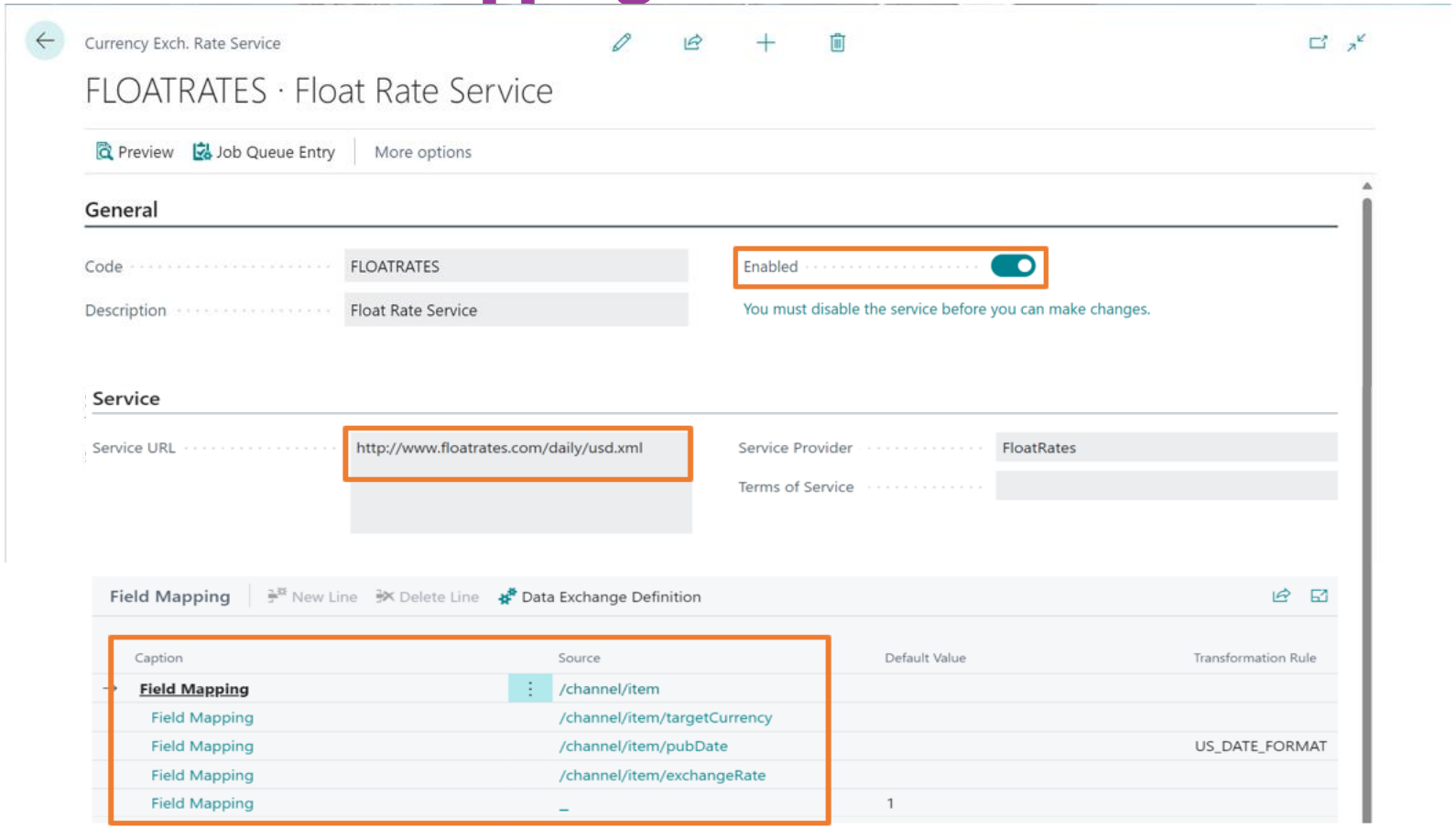


#20 Set up a Currency Exchange Rate Service in 2 minutes

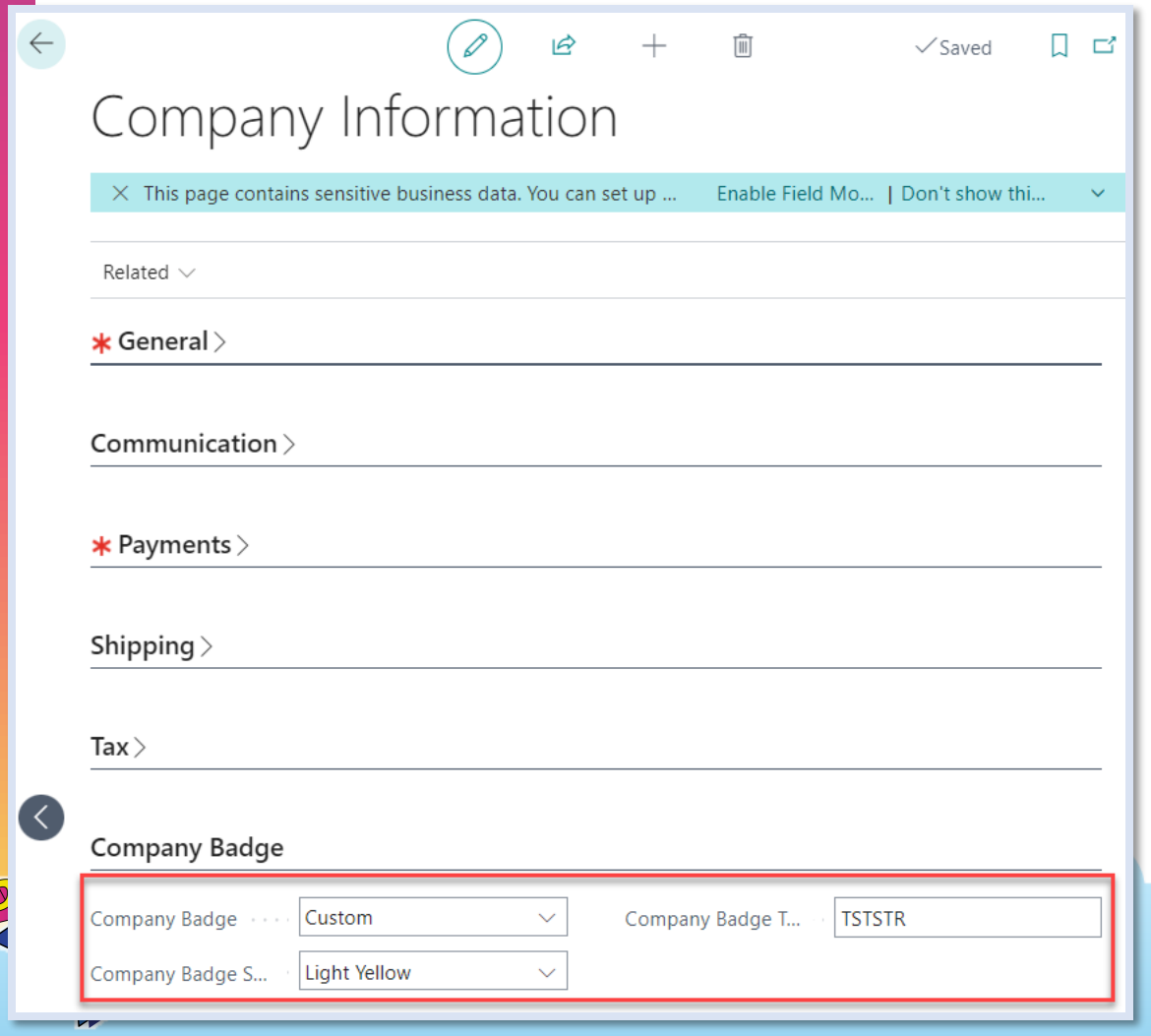


Code	Description	ISO Code	ISO Numeric Code	Exchange Rate Date	Exchange Rate	EMU Curr...	Realized Gains Acc.
AED	Arabiske Emirat...	AED	784	1/1/2021	2.00131	☐	07330
AUD	Australske dollar	AUD	036	1/1/2021	2.9366	☐	07330
BGN	Bulgarisk lev	BGN	975	1/1/2021	2.7063	☐	07330
BND	Brunei Darussal...	BND	096	1/1/2021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

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



#21 Use a Company Badge?



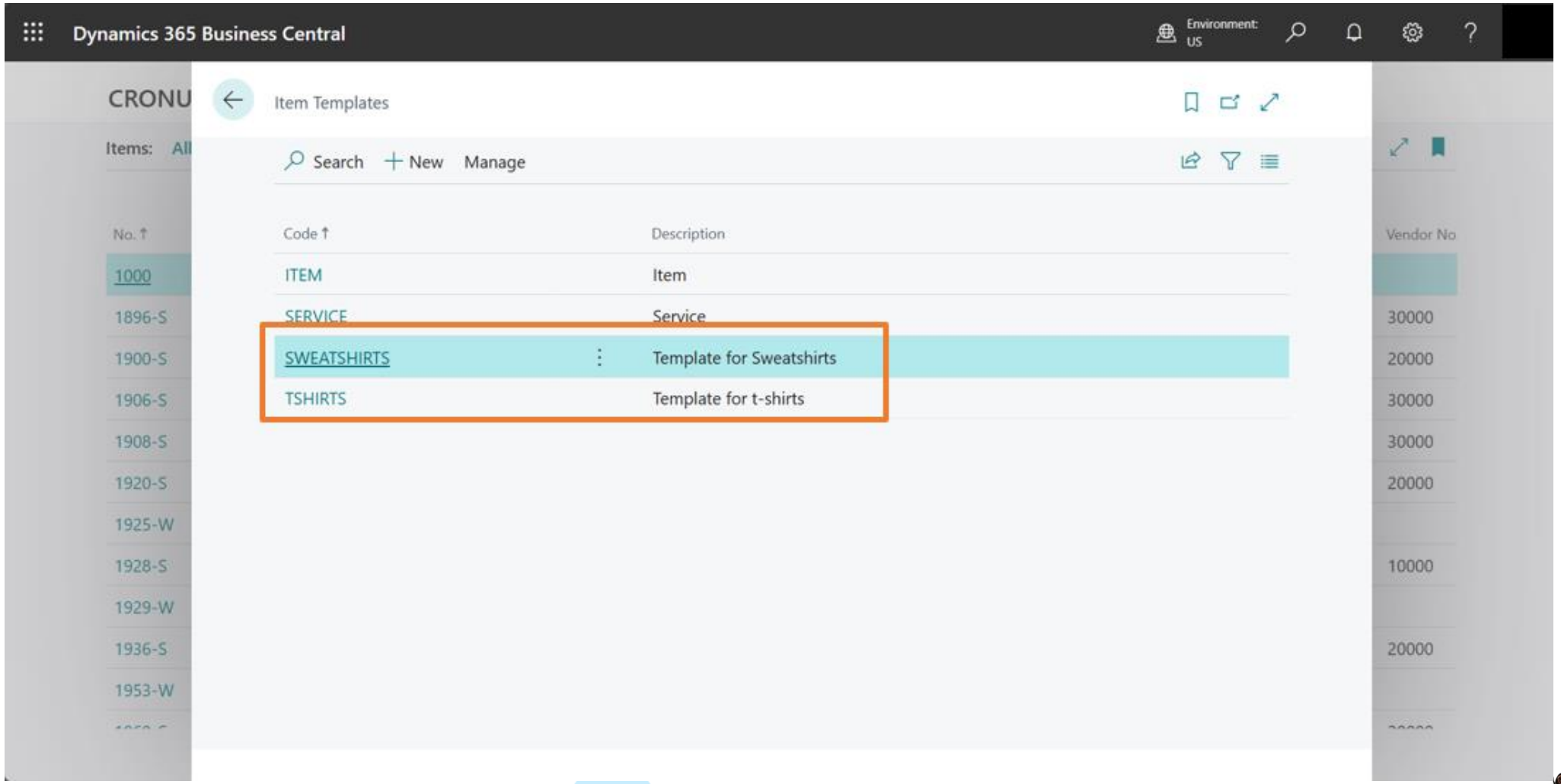
Super helpful

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

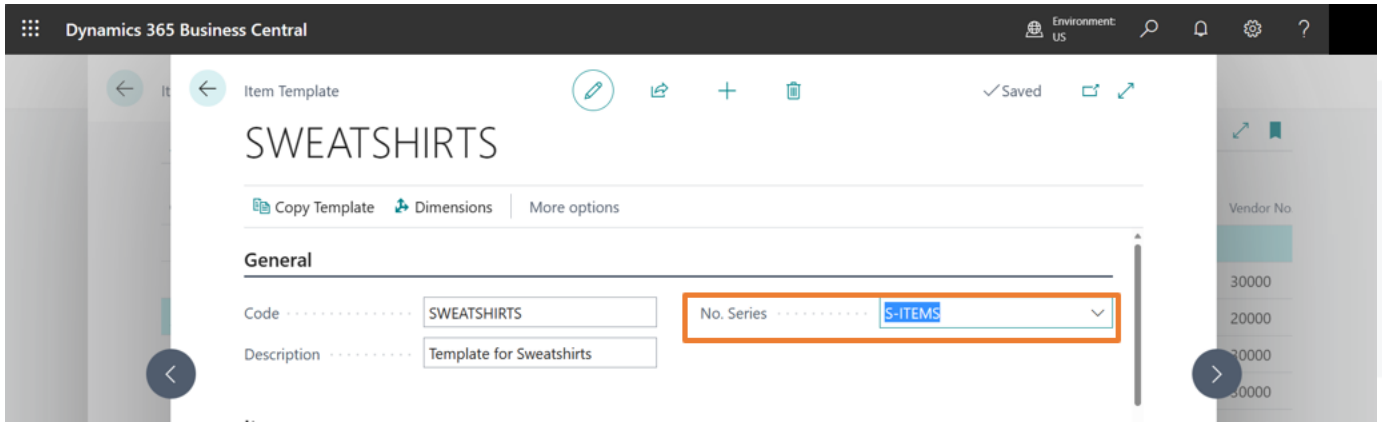
Easy to setup.

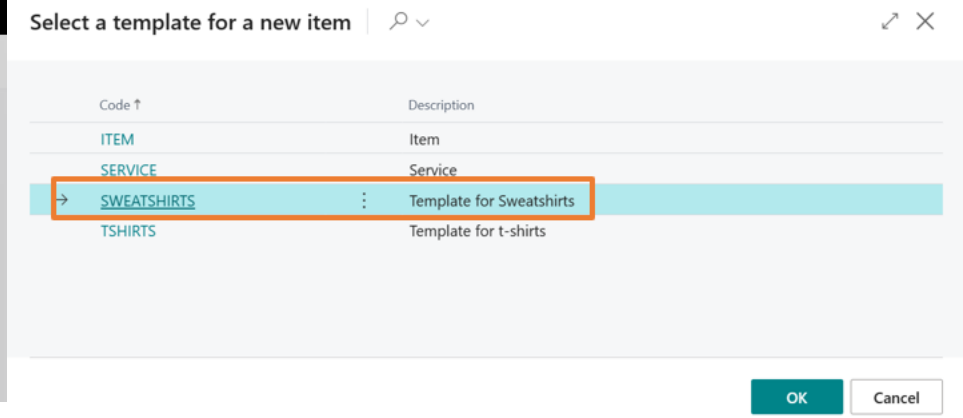
Yes, use it!!!

#22 Use Item Templates to number new items

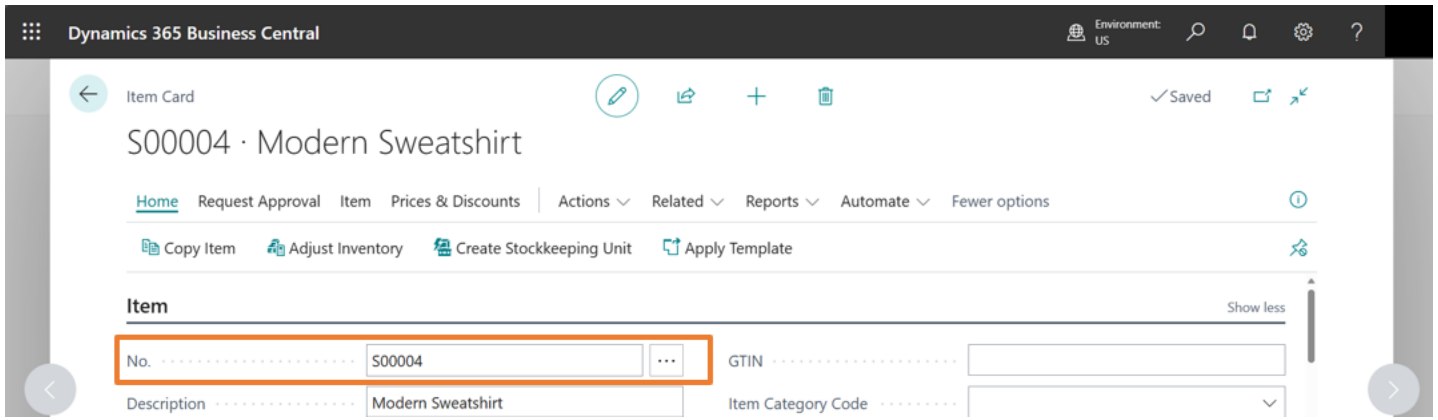


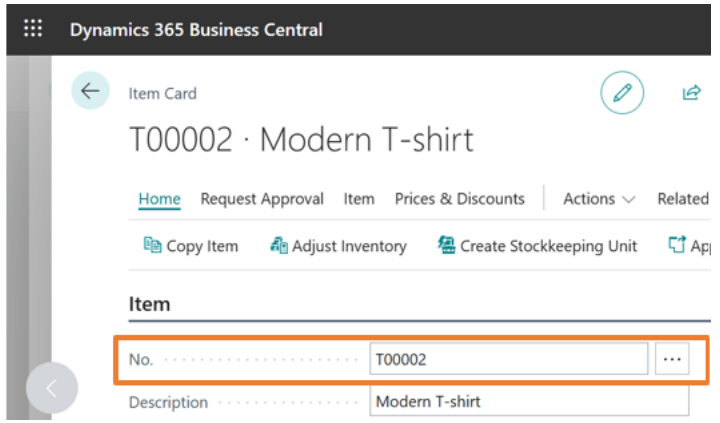
#22 Set number series per template



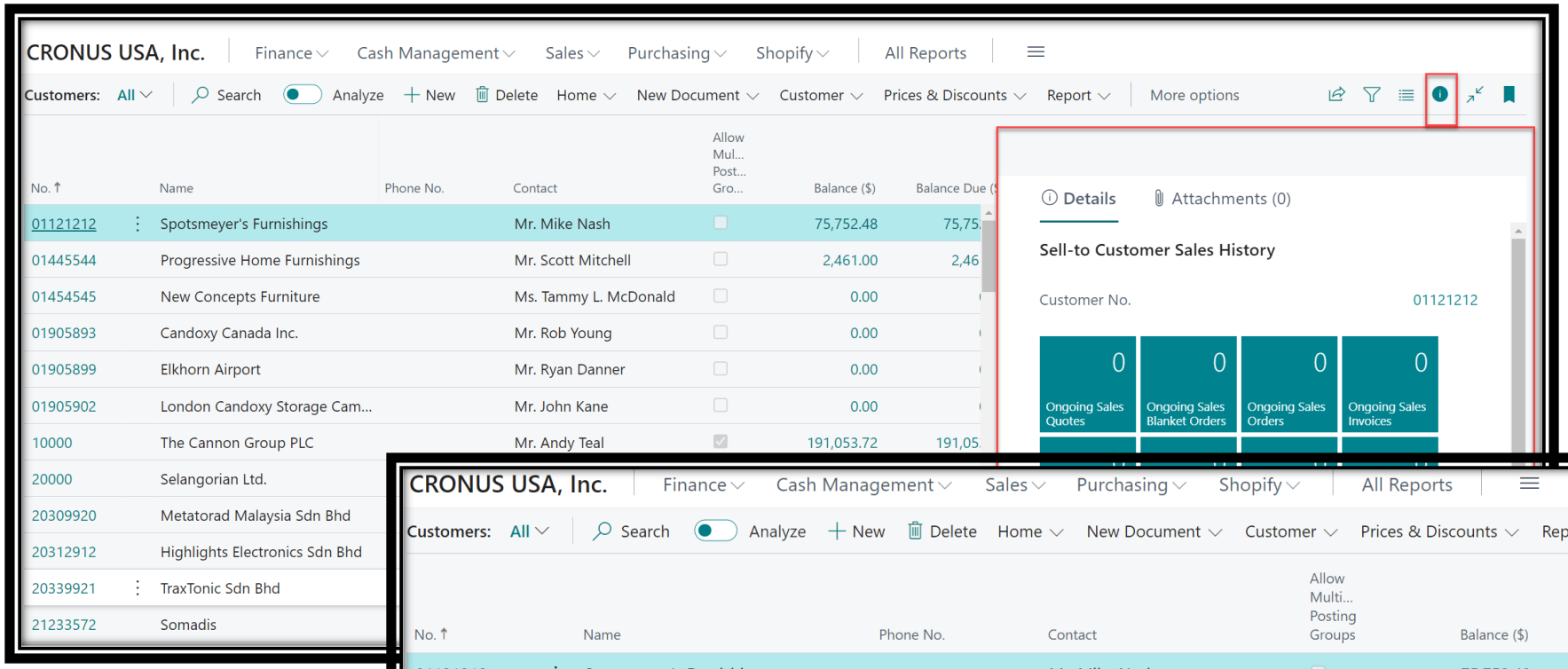


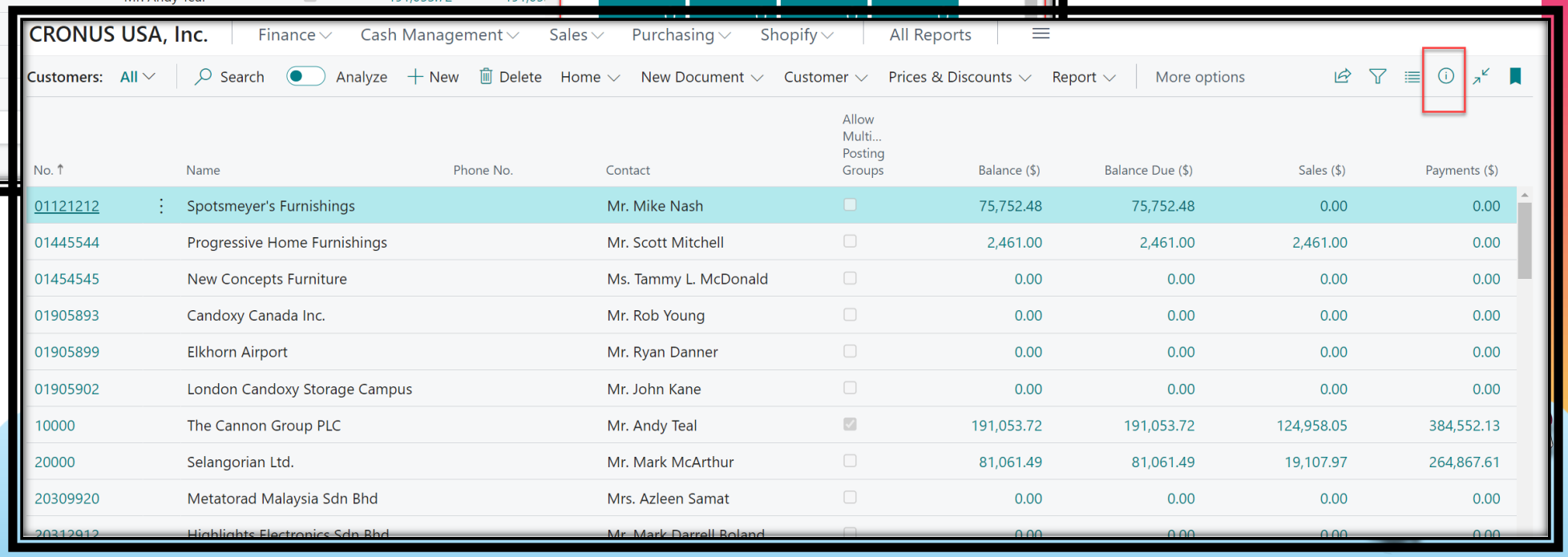
When creating items, each template uses different numbering





#23 More Screen Real Estate?

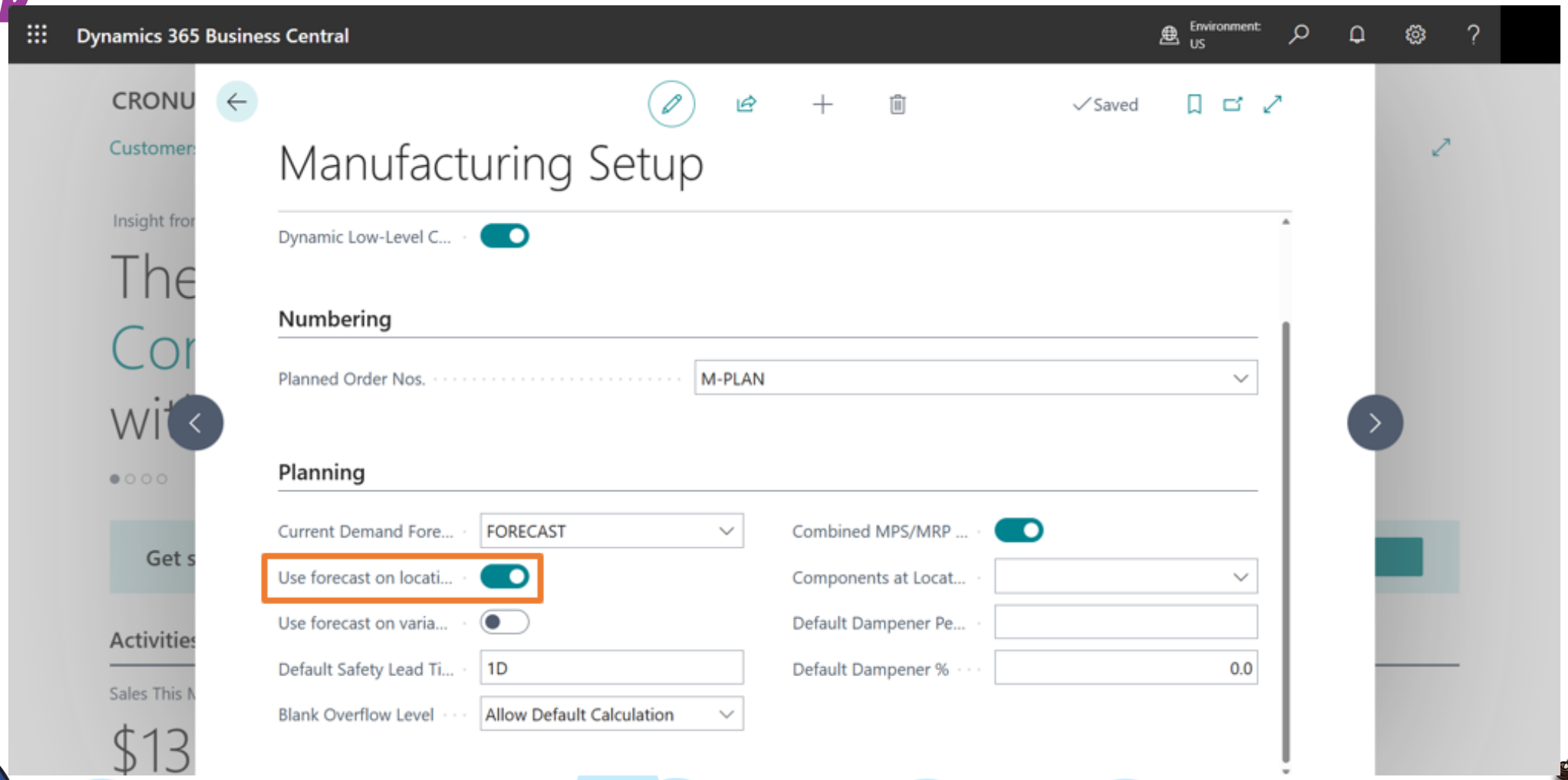




Hide/Show Fact Boxes

#24 Sales forecasting per location

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



#25 More Screen Real Estate?

Customer Card

01121212 · Spotsmeyer's Furnishings

Saved

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			

Customer Card

01121212 · Spotsmeyer's Furnishings

Saved

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

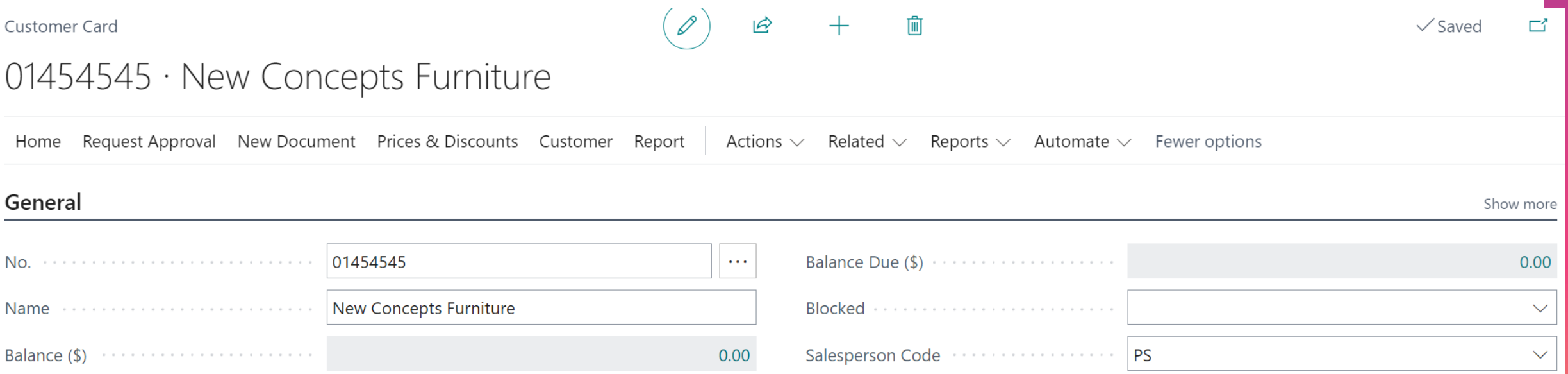
Saved

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

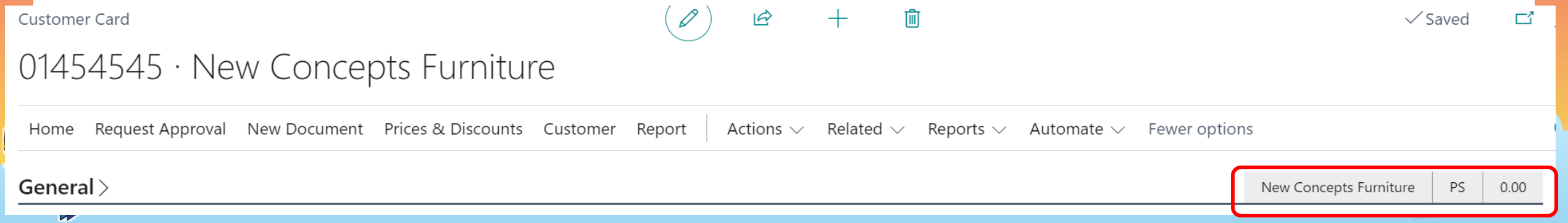
General | Spotsmeyer's Furnishings | PS

Fast Tabs
Collapse / Expand

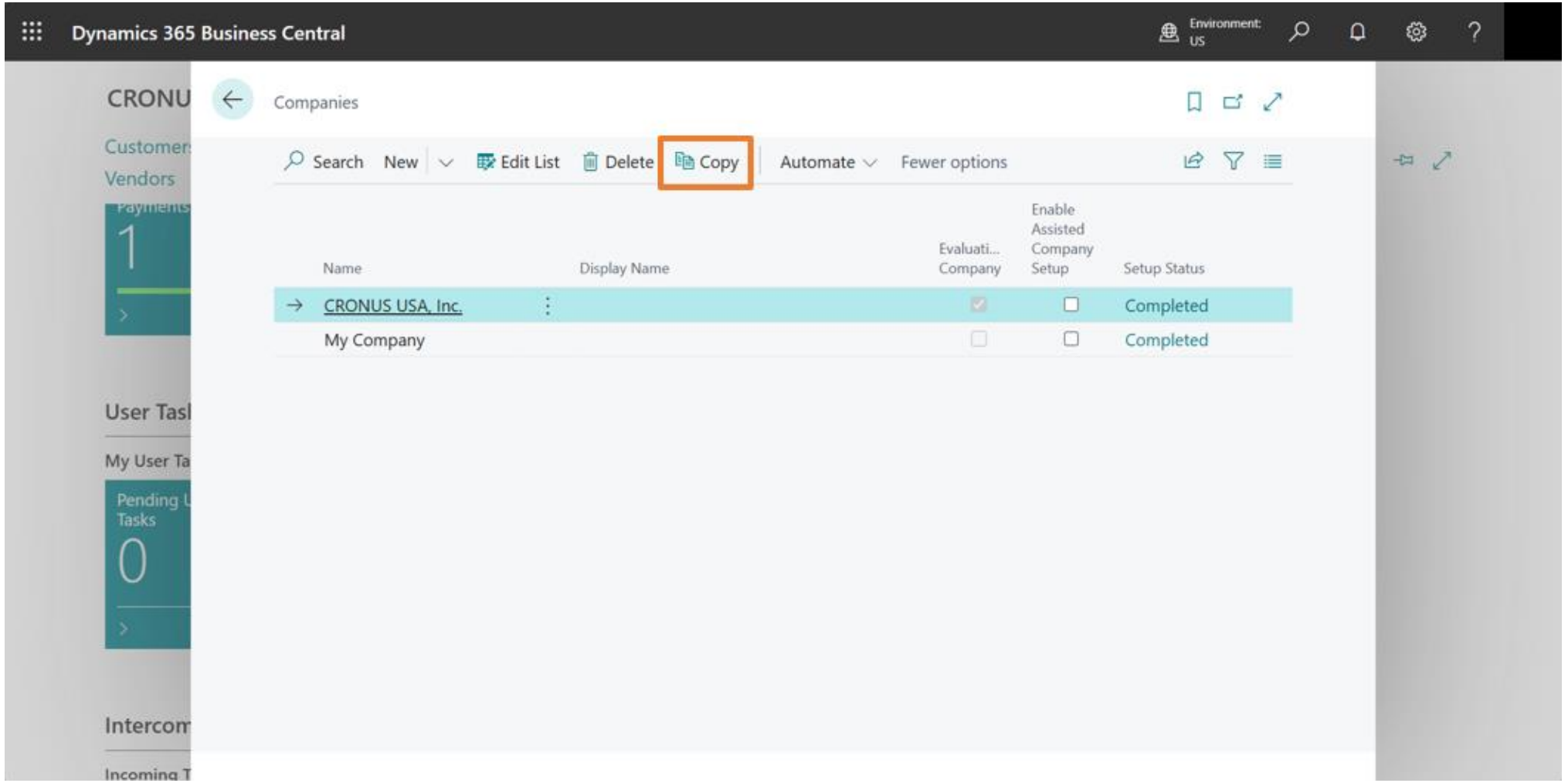
#25 More Screen Real Estate?



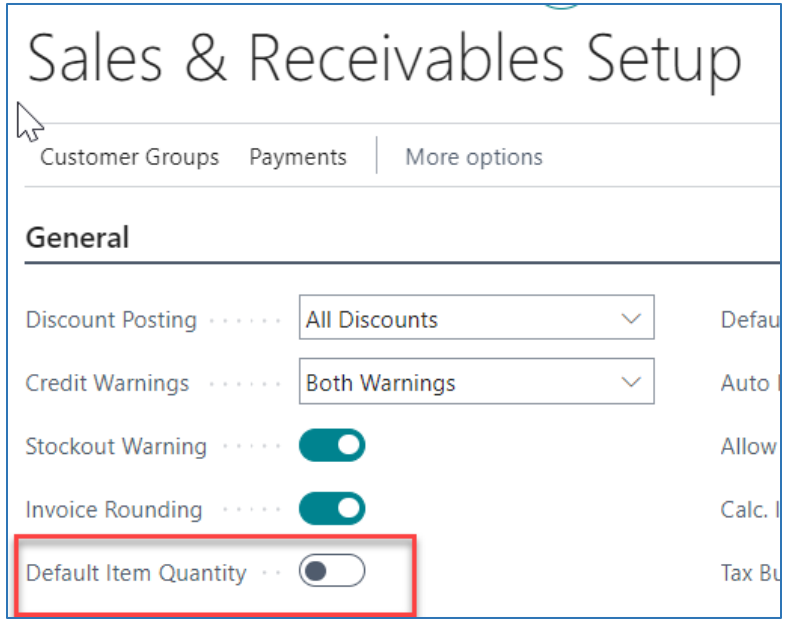
Personalize

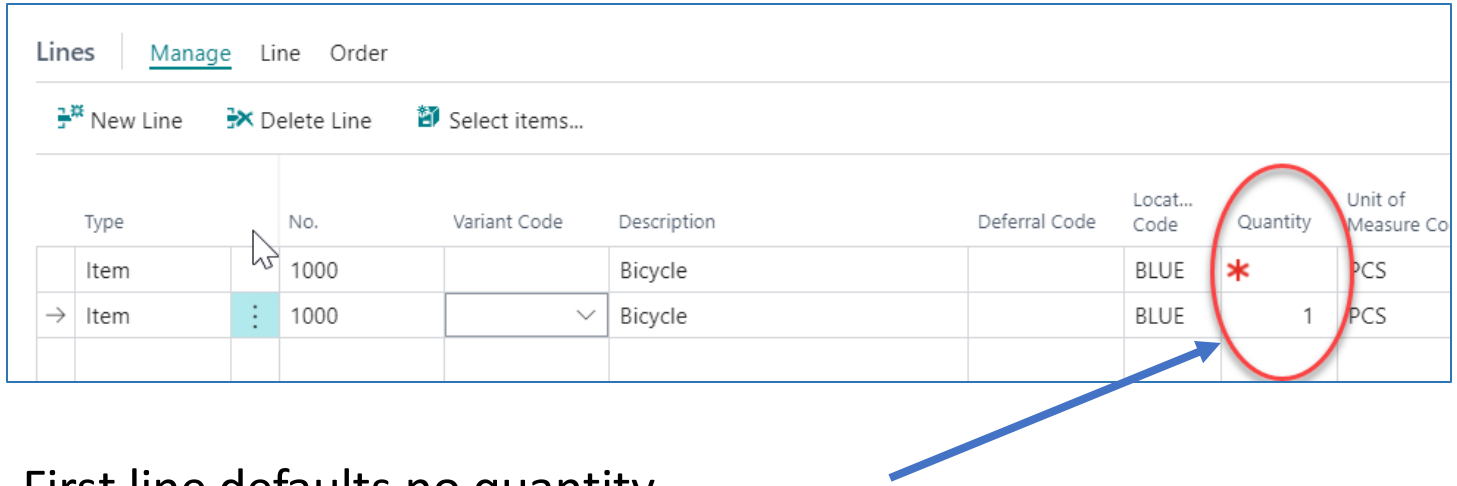


#26 Copy the newly set up company (for testing or prod)



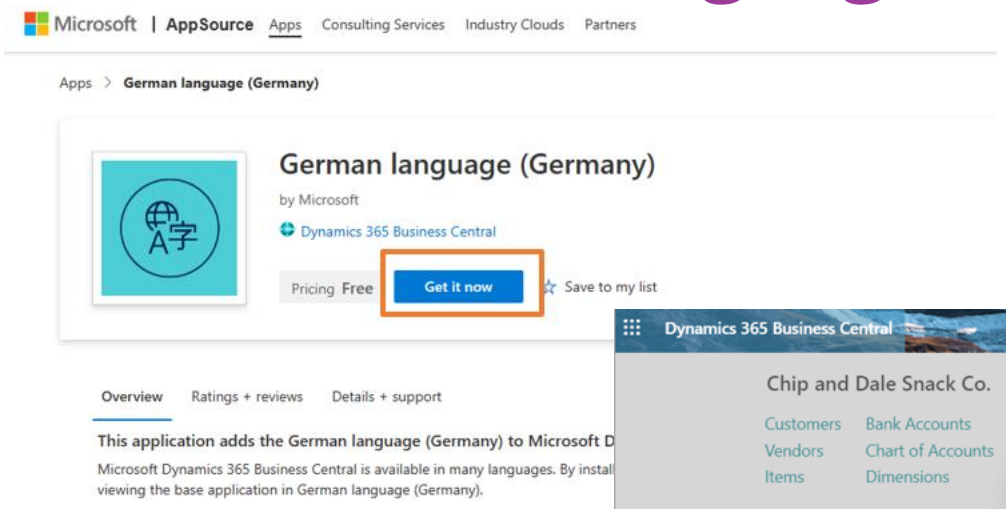
#27 Default Item Quantity



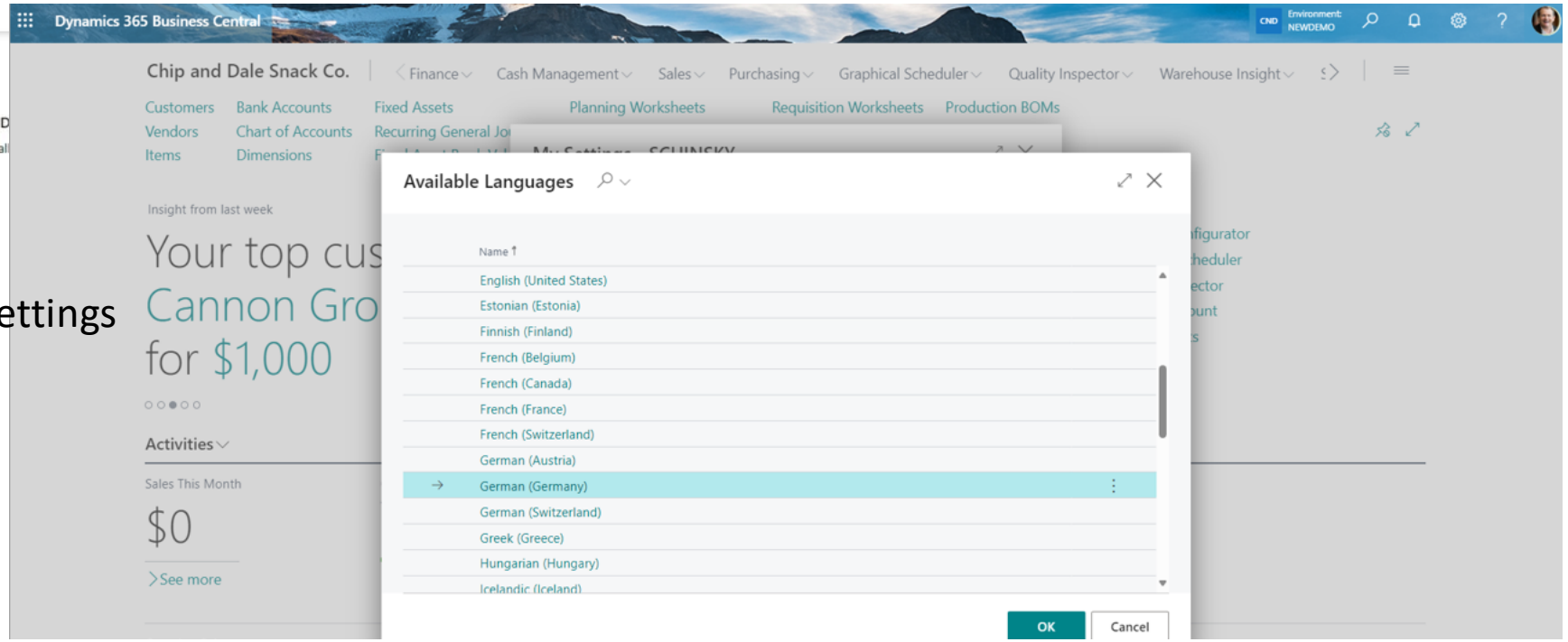


First line defaults no quantity
Turn on Default Item Quantity, second line defaults quantity to 1

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

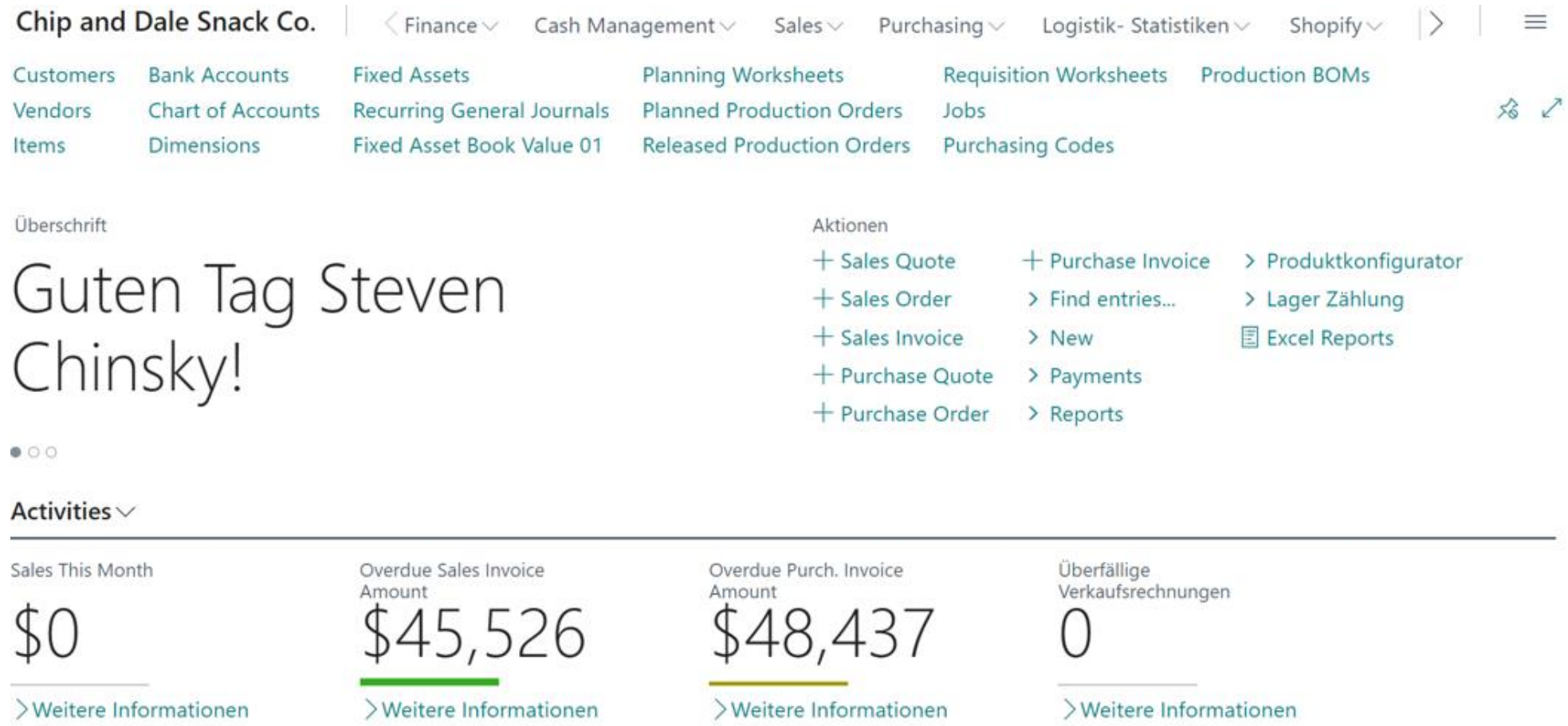


User selects language in My Settings

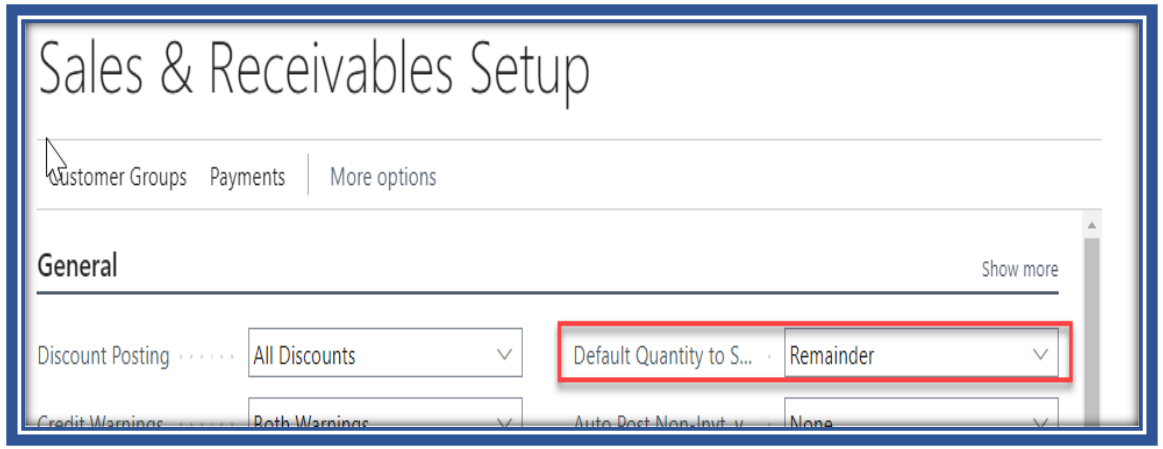


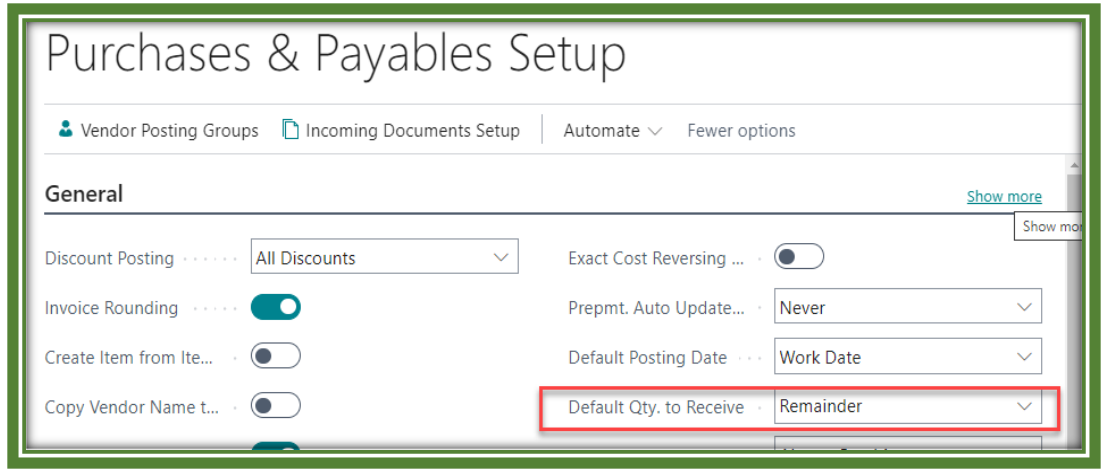
#28 All languages available, regardless which country you're in

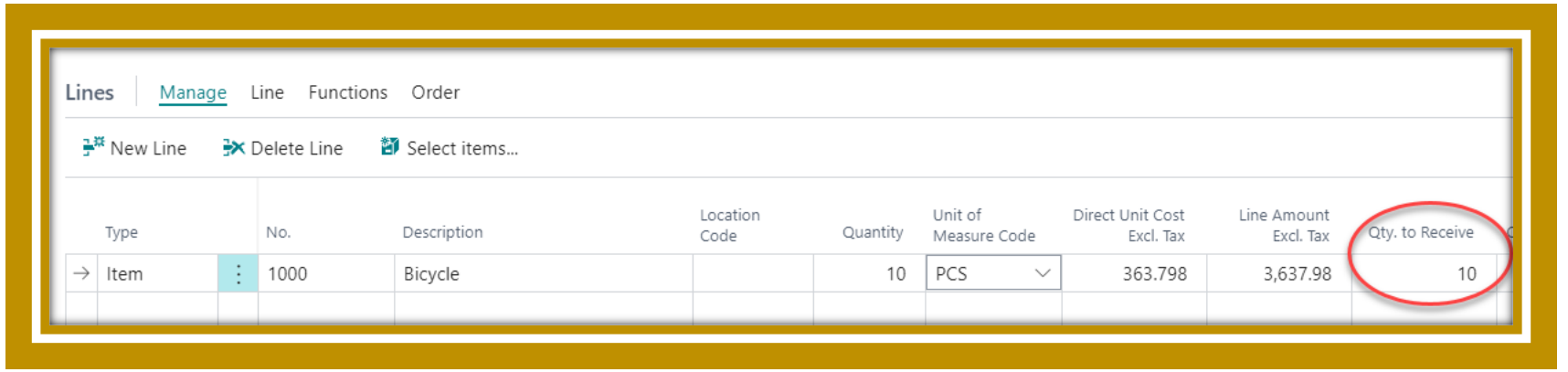
German user in US? No problem



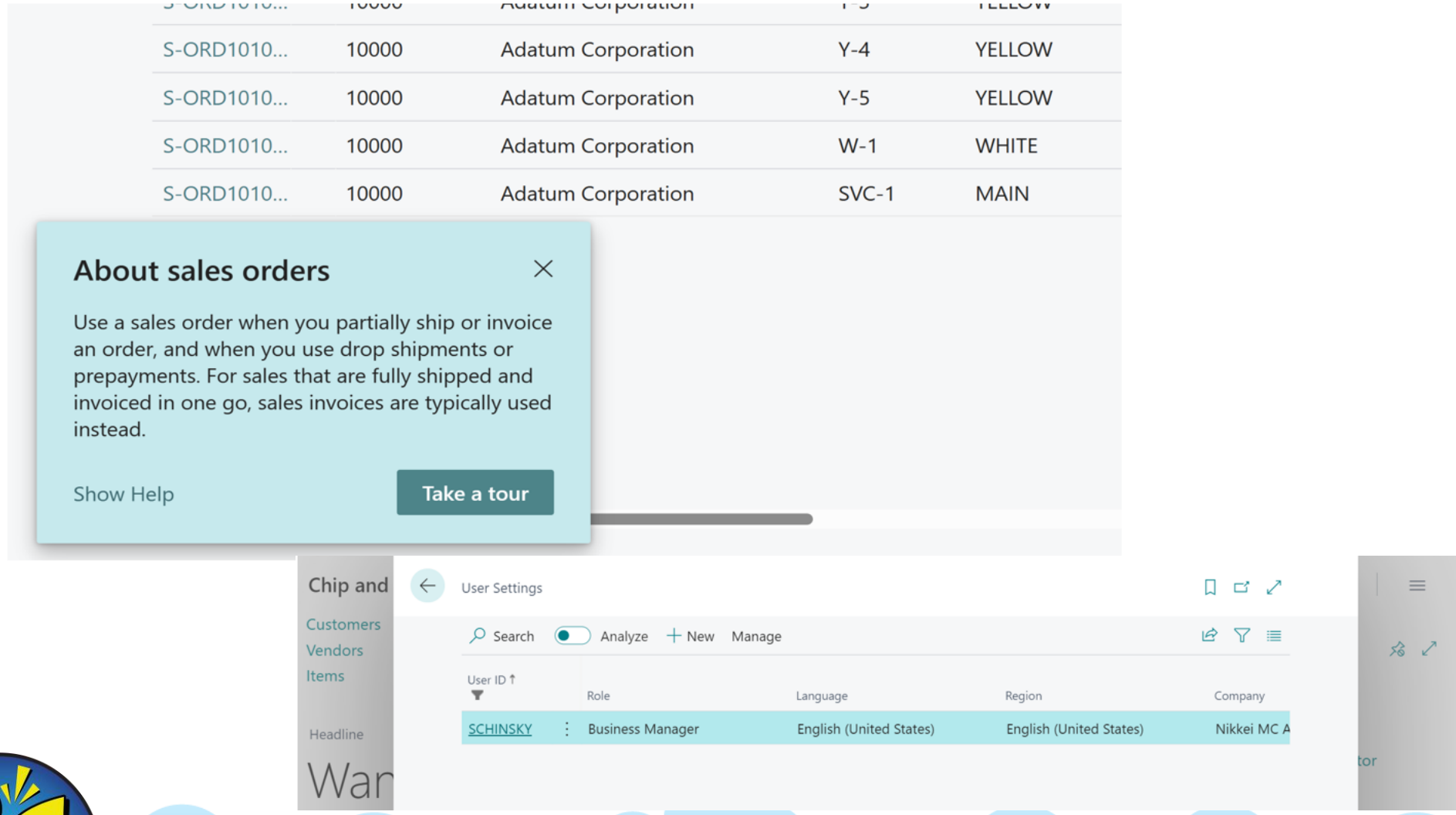
#29 Auto Populate Qty to Receive/Ship?



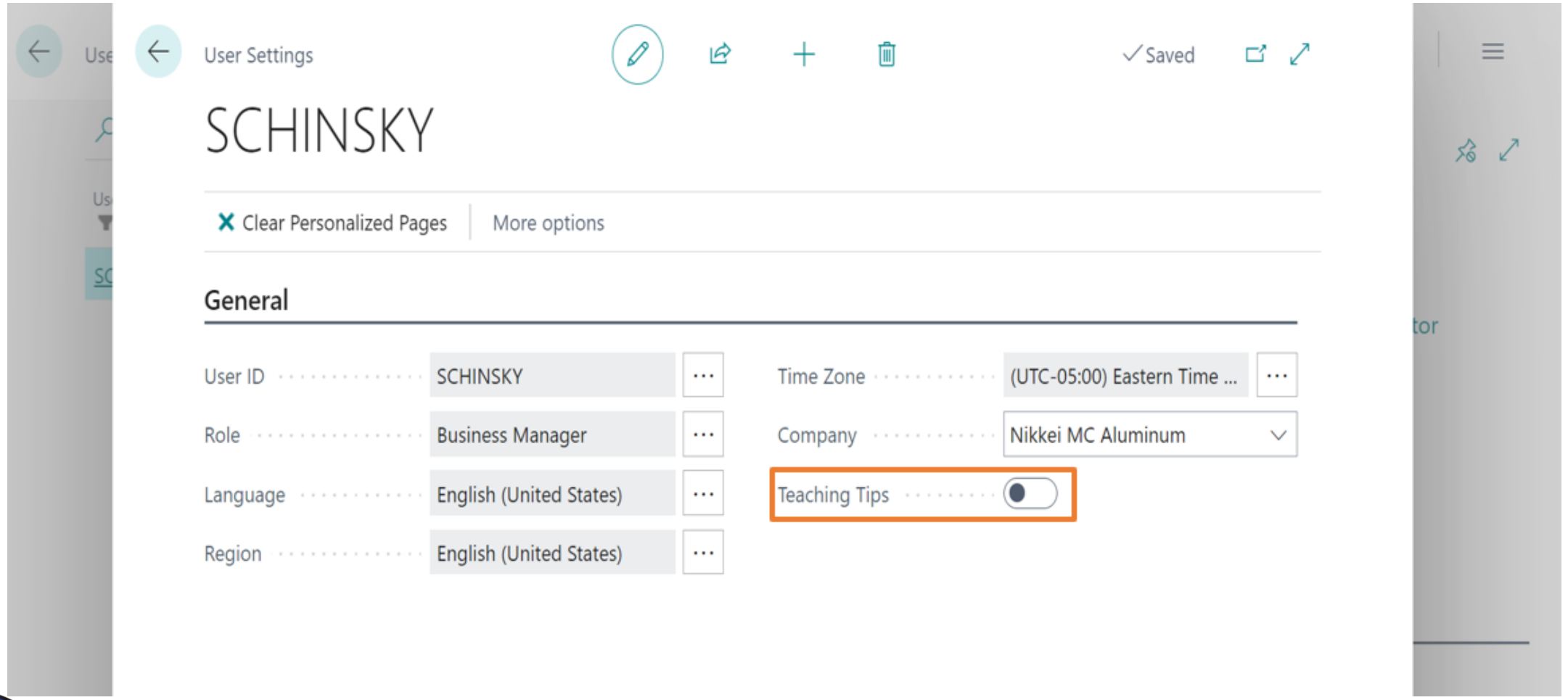




#30 Admin can set Teaching tip visibility per user



#30 Admin can set Teaching tip visibility per user



General Business Central resources
Learn more!

Looking for resources?
aka.ms/BCUsers

Join the conversation
twitter.com/MSDyn365BC

Need more training?
aka.ms/BCLearn

Follow us on LinkedIn
aka.ms/BCLinkedIn

Read the capability guide
aka.ms/BCcapabilities

Watch on-demand sessions
aka.ms/BCLE

Questions and Answers

THANK YOU!

Need Help:

schinsky@accelerynt.com
kim@dallefeld.com