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DYNAMICS CON LIVE

MAY 2024



**Business Central
Implementation Best Practices
from a newbie....**

Presented by: Alyssa Buis

- Full-time stay at home mom
Using BC since 2022
- Certified Functional BC Consultant
Oct 22
- Background in Service Desk
Management for GP for 6+ years
- Implemented more than 10 BC
integrations from multiple ERPs
- Directions NA Speaker
- CollabDays Utah Speaker
- DUG St. Louis Meetup Leader



Agenda

- Project Phases
 - M365 Tools
- Knowing Your Customer
 - Standard Settings
 - Testing
 - Documentation



Project Phases

Phases

- Pre-sales
- Estimate
- Discovery
 - Setup
- Validation
 - Go Live



Phases – Pre-sales & Estimate

- Demo(s) of Business Central
- Quick recap of modules needed
- Provide SOW & Project Estimate
- Provide Project Plan & Timeline



Phases – Discovery

- Multiple sessions (if needed)
- Walk-through ALL current processes
 - Record the session
- Ask questions & **DON'T ASSUME ANYTHING**



Phases – Setup & Validation

- Create requirements list
- Validate settings multiple times
 - Validate with teammate
- Mark off only when fully completed



Phases – Go Live

- Create Go Live tasks lists
- Be fully available to customer
 - Set dedicated meetings
 - Be flexible



M365 Tools

Tools

Many great tools inside the M365 space that can keep everything linked!

- Teams
- Planner
- Outlook
- SharePoint
- OneDrive
- Key Websites
- Loop (looking forward to researching more!)





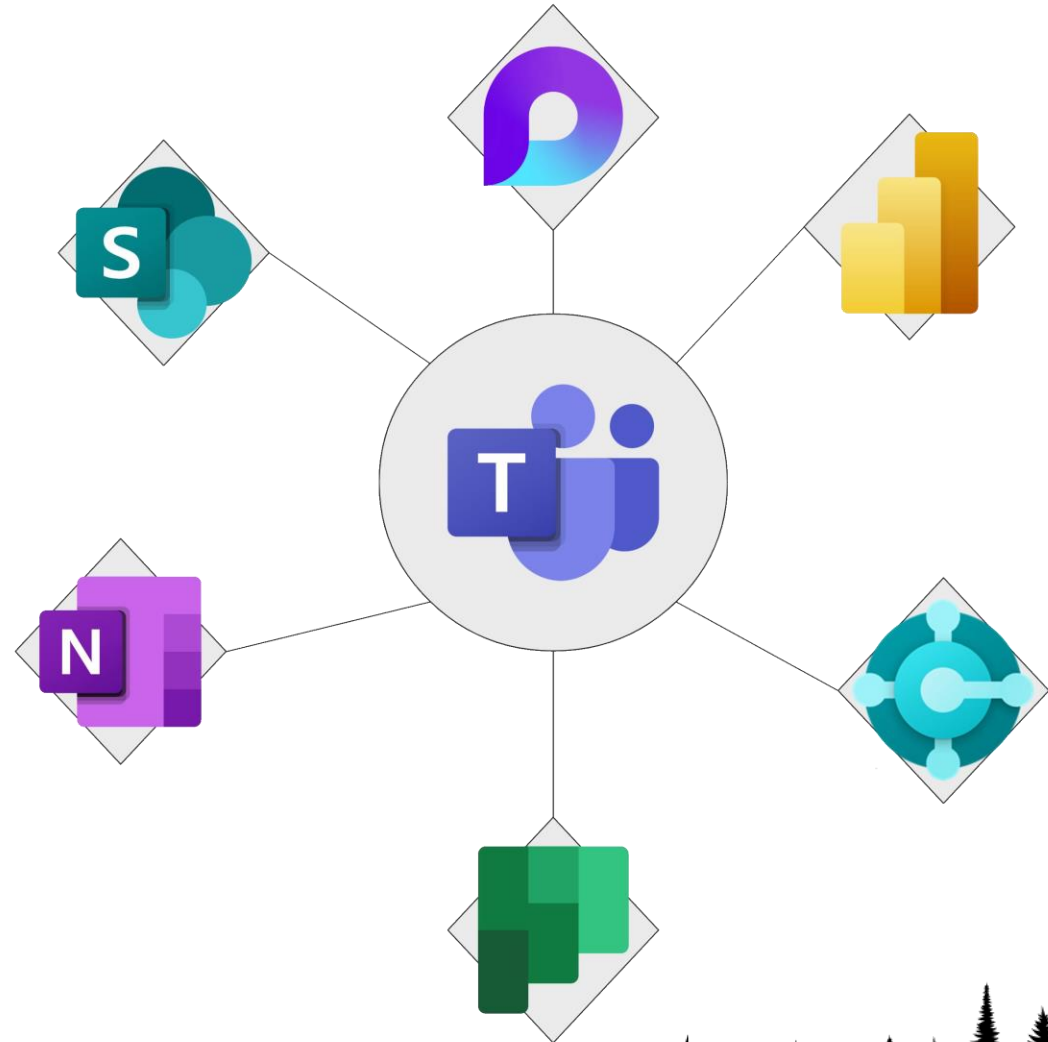
M365 Tool Belt

By: Copilot



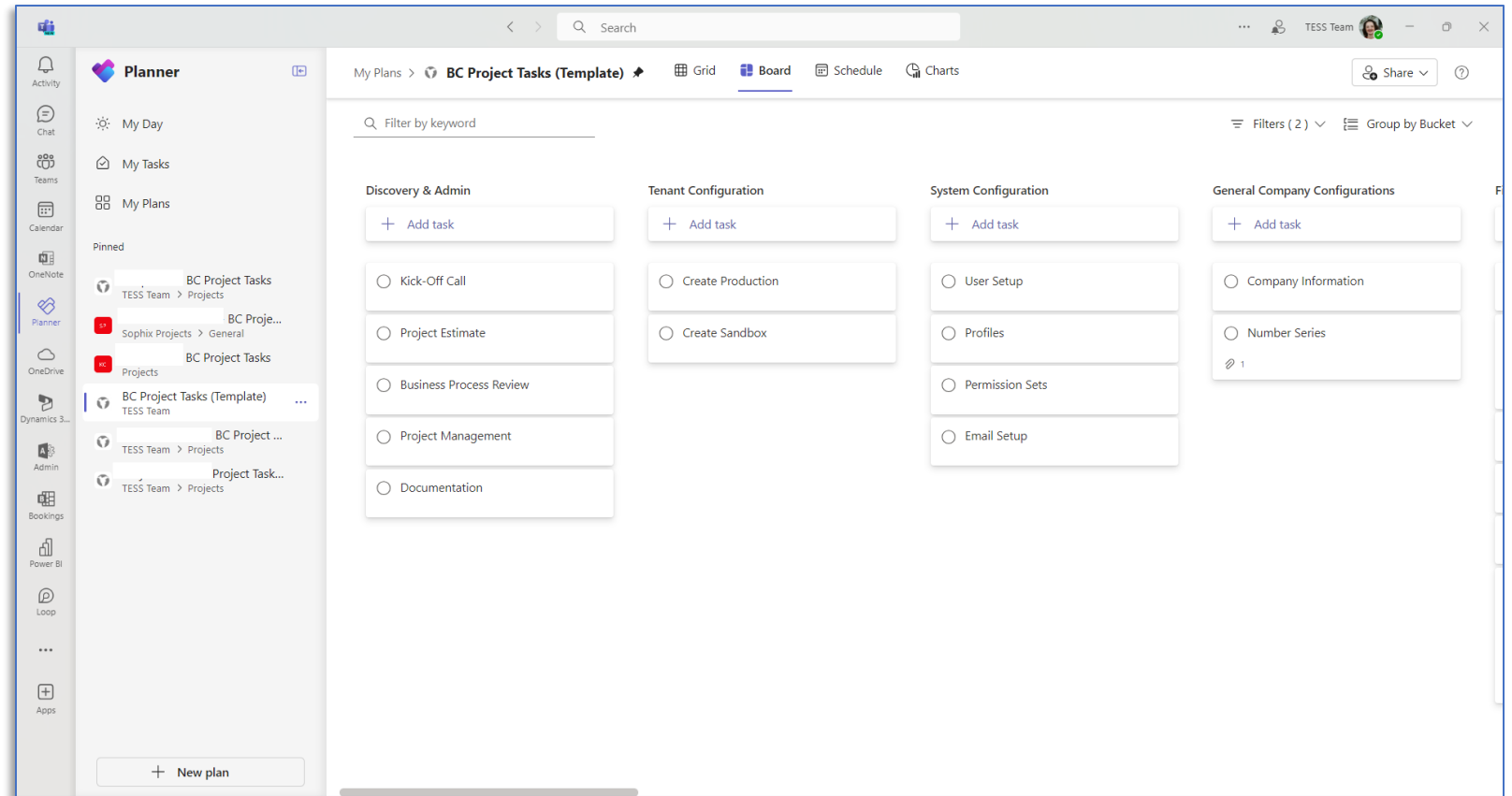
Tools - Teams

- Link many M365 apps directly
- Team collaboration & communication



Tools - Planner

- Create & assign tasks
- Create multiple plans
- For personal & team collaboration
- Many tracking views



Tools – Websites

- Microsoft Learn
learn.microsoft.com
- Microsoft Planner
releaseplans.microsoft.com



Knowing Your Customer

Customer – Questions to ask?

- Industry?
- Team Size?
- Modules?
- Essential processes?
 - New processes?
 - Workflows?
 - Third parties?



Customer – Know the Team

- Full Name
- Contact Info
- Company Role
 - Processes
- License Type



Standard Settings

Settings – No Series

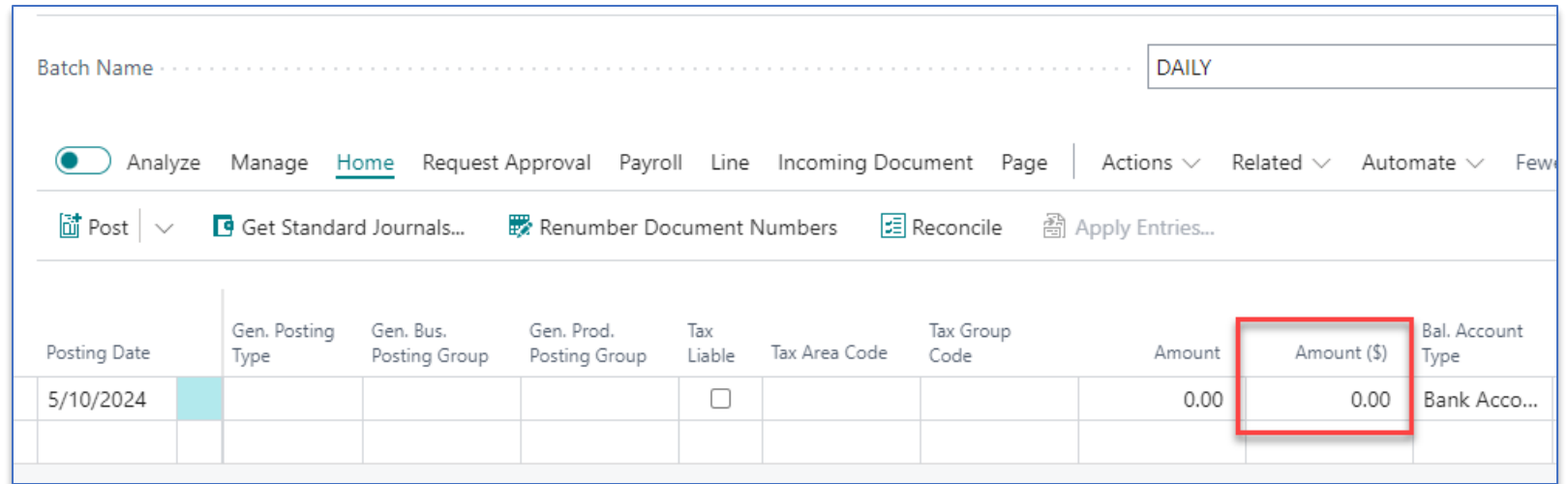
- Expand the No Series before anything else!

Code ↑	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Def... Nos.	M N
A-BLK	Assembly Blanket Orders	A00001	A99999	–	–	<input checked="" type="checkbox"/>	▲
A-ORD	Assembly Orders	A00001	A99999	–	–	<input checked="" type="checkbox"/>	
A-ORD+	Posted Assembly Orders	A00001	A99999	–	–	<input checked="" type="checkbox"/>	
A-QUO	Assembly Quote	A00001	A99999	–	–	<input checked="" type="checkbox"/>	
BANK	BANK	B010	B999	4/30/2024	B140	<input checked="" type="checkbox"/>	
BKADJ	Bank Adjustments	BKADJ0001	BKADJ9999	–	–	<input type="checkbox"/>	
BNKDEPOSIT	Bank Deposit	BD00001	BD99999	–	–	<input checked="" type="checkbox"/>	
CAMP	Campaign	CP0001	CP9999	–	–	<input checked="" type="checkbox"/>	
CONT	Contact	CT000001	CT999999	5/8/2024	CT001842	<input checked="" type="checkbox"/>	
CT-MSG	Credit Transfer Msg. ID	1001	9999	–	–	<input checked="" type="checkbox"/>	
CUST	Customer	C00010	C99990	–	–	<input checked="" type="checkbox"/>	



Settings – Profiles

- Company Profile settings
- Hide duplicate fields on main windows
- Highlight Saved Views on List Pages



Batch Name DAILY

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

Post ▾ Get Standard Journals... Renummer Document Numbers Reconcile Apply Entries...

Posting Date	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Tax Liable	Tax Area Code	Tax Group Code	Amount	Amount (\$)	Bal. Account Type
5/10/2024				<input type="checkbox"/>			0.00	0.00	Bank Acco...



Settings – Simple Changes

- General Ledger Setup – Preview Posting - Extended View
- Purchase & Payables Setup – Default Line Type – GL Account
 - Purchase Invoice Header – Add Posting Description
- Feature Management – Any new features that we have tested and have found to very helpful!



Testing

Testing

- Create your copy of live with all the settings/data
- Test all processes FULLY!
- Training for processes (old & new)
- Provide customers the access to test processes themselves (test company!)



Documentation

Wait...who does documentation?!



Documentation

- Based off original project plan & estimate
- Any project changes that were decided during different phases
- Setup formats: check, ACH, sales/purchase invoices, default emails, etc!





GO LIVE!
(AND HIDE)

Questions?



Contact Info:
Alyssa Buis

alyssa@tessteam.com

X: @alyssatessteam

Linked In: Alyssa Buis

