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Background:
- Awarded MS MVP in BizApps in 2014
- Have worked with AX since 2007
- Have worked with D365FO since 2016

Become a master of your data - Dynamics 365 Excel Addin

In most implementations, its all about minimum viable products and getting to the objectives. And then everyone leaves... and no then its all about 'innovating' and finding your own way. There is little time spent on end user enablement. Its time for that to change...

Take control of your data and understand how your data comes in an out of your ERP. Explore on your own, test on your own, then execute valuable use cases on your own.

In this session, we'll demonstrate multiple common scenarios that companies encounter such as creating Sales orders, purchase orders, customers, free text invoices, data cleanup, etc using Excel.
The goal is to leave this session being able to execute on your own scenarios right out of the gate.

Excel – Live demonstration

- What is the Excel addin
- Open in Excel vs Edit in Excel
- Searching for entities in Excel
- Searching for entities in D365
- Creating a custom worksheet
- Publish data from Excel to D365
- Advanced tasks with Excel (filtering, sorting, auto-refreshing)
- Saving Excels (best practices)
- Attaching Excel templates to entities.
- Leverage base MS Excel templates (sales order, free text invoice, customers)
- Attaching custom entities (technical)
- Web service Excel call
- Some bonus Excel content if time allows!!

Template	Supported account types	How to access the template
Ledger journal lines	Account: Ledger, Customer, Vendor, Bank Offset account: Ledger, Customer, Vendor, Bank Intercompany is supported.	General journal
Invoice register	Account: Vendor Offset account: Ledger Intercompany isn't supported.	AP invoice register
Invoice journal	Accounts: Vendor Offset account: Ledger Intercompany is supported.	AP invoice journal
Vendor invoice		Vendor invoice
Customer invoice journal	Account: Customer Offset account: Ledger Intercompany is supported.	General journal
Free text invoice		On the **Free text invoice** page, click **Open in Excel** (the Microsoft Office icon).
Fixed assets journal	Asset to ledger, bank, customer, or vendor. Intercompany isn't supported.	Fixed asset journal
Vendor payment journal	Account: Vendor Offset account: Ledger, Bank Intercompany is supported.	Vendor payment journal
Customer payment journal	Account: Customer Offset account: Ledger, Bank Intercompany is supported.	Customer payment journal
Project expense journal	Account: Project, Ledger, Customer, Vendor Offset account: Project, Ledger, Customer, Vendor Intercompany is supported.	General journal Expense (under Project management and accounting)

[Publish journal lines and documents from Excel - Finance | Dynamics 365 | Microsoft Learn](#)

Live
Demo!

Q&A