



Searching for Answers – Ready-to-use tools for all users in Business Central

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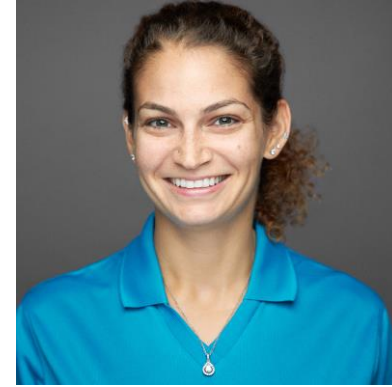


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LinkedIn!



Session Objectives

1. Become a pro at searching and finding the correct data in Business Central
2. Walk away with tools and tips to use immediately for finding the data you need
3. Make better decisions - financial, transactional, operational, no limits!



I want to find...



**...the date something actually
posted**



Sales invoice posted with future date

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Shopify

All Reports



Posted Sales Invoices: All



Delete

Home

Print/Send

Invoice

Correct

More options

No.	Customer No.	Customer Name	Currency Code	External Document No.	Posting Date	Due Date	Amount	Amount Including Tax	Remaining Amount
PS-INV103215	50000	Relecloud			7/2/2024	7/16/2024	13,599.56	13,599.56	13,599.56
PS-INV103198	30000	School of Fine Art			4/1/2024	4/30/2024	1,906.40	2,039.85	2,039.85
PS-INV103197	50000	Relecloud			3/31/2024	4/14/2024	2,907.40	3,081.84	3,081.84
PS-INV103196	30000	School of Fine Art			3/27/2024	3/31/2024	18,639.90	19,944.69	19,944.69
PS-INV103195	20000	Trey Research			3/26/2024	4/9/2024	964.00	1,012.20	1,012.20
PS-INV103194	40000	Alpine Ski House			3/24/2024	3/24/2024	4,604.80	4,927.14	0.00
PS-INV103193	30000	School of Fine Art			3/24/2024	3/24/2024	658.80	704.92	0.00
PS-INV103192	50000	Relecloud			3/23/2024	3/23/2024	4,336.00	4,596.16	0.00
PS-INV103191	10000	Adatum Corporation			3/21/2024	3/21/2024	20,359.40	21,580.96	0.00
PS-INV103190	20000	Trey Research			3/21/2024	3/21/2024	3,074.00	3,227.70	0.00



Find Company Data Demo

Dynamics 365 Business Central

Environment: PreviewW124Sandbox

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

Posted Sales Invoices: All | Delete | Home | Print/Send | Invoice | Correct | More options

No.	Customer No.	Customer Name	Currency Code	External Document No.	Posting Date	Due Date	Amount	Amount Including Tax	Remaining Amount	Location Code	No. Printed	Closed	Cancel
PS-INV103215	50000	Relecloud			7/2/2024	7/16/2024	13,599.56	13,599.56	13,599.56		0	No	
PS-INV103198	30000	School of Fine Art			4/1/2024	4/30/2024	1,906.40	2,039.85	2,039.85		0	No	
PS-INV103197	50000	Relecloud			3/31/2024	4/14/2024	2,907.40	3,081.84	3,081.84		0	No	
PS-INV103196	30000	School of Fine Art			3/27/2024	3/31/2024	18,639.90	19,944.69	19,944.69		0	No	
PS-INV103195	20000	Trey Research			3/26/2024	4/9/2024	964.00	1,012.20	1,012.20		0	No	
PS-INV103194	40000	Alpine Ski House			3/24/2024	3/24/2024	4,604.80	4,927.14	0.00		0	Yes	
PS-INV103193	30000	School of Fine Art			3/24/2024	3/24/2024	658.80	704.92	0.00		0	Yes	
PS-INV103192	50000	Relecloud			3/23/2024	3/23/2024	4,336.00	4,596.16	0.00		0	Yes	
PS-INV103191	10000	Adatum Corporation			3/21/2024	3/21/2024	20,359.40	21,580.96	0.00		0	Yes	
PS-INV103190	20000	Trey Research			3/21/2024	3/21/2024	3,074.00	3,227.70	0.00		0	Yes	
PS-INV103189	40000	Alpine Ski House			3/20/2024	3/20/2024	385.60	412.59	0.00		0	Yes	
PS-INV103188	50000	Relecloud			3/19/2024	3/19/2024	380.20	403.01	0.00		0	Yes	
PS-INV103187	30000	School of Fine Art			3/18/2024	3/18/2024	385.60	412.59	0.00		0	Yes	
PS-INV103186	10000	Adatum Corporation			3/17/2024	3/17/2024	964.00	1,021.84	0.00		0	Yes	
PS-INV103185	20000	Trey Research			3/16/2024	3/16/2024	219.60	230.58	0.00		0	Yes	
PS-INV103184	50000	Relecloud			2/28/2024	3/13/2024	2,714.60	2,877.48	2,877.48		0	No	
PS-INV103183	30000	School of Fine Art			2/28/2024	2/29/2024	2,666.80	2,853.48	2,853.48		0	No	
PS-INV103182	30000	School of Fine Art			2/24/2024	2/29/2024	15,264.60	16,333.12	16,333.12		0	No	
PS-INV103181	20000	Trey Research			2/24/2024	3/9/2024	1,156.80	1,214.64	1,214.64		0	No	
PS-INV103180	40000	Alpine Ski House			2/23/2024	3/23/2024	4,034.50	4,316.92	4,316.92		0	No	
PS-INV103179	50000	Relecloud			2/21/2024	2/21/2024	4,716.20	4,999.17	0.00		0	Yes	
PS-INV103178	10000	Adatum Corporation			2/20/2024	2/20/2024	16,770.40	17,776.62	0.00		0	Yes	
PS-INV103177	20000	Trey Research			2/20/2024	2/20/2024	2,691.10	2,825.66	0.00		0	Yes	
PS-INV103176	40000	Alpine Ski House			2/19/2024	2/19/2024	385.60	412.59	0.00		0	Yes	



I want to find...



**...everything in the system related
to a specific vendor invoice number**



Search in data...

Dynamics 365 Business Central

New View Strategies

Finance ▾

Cash Management ▾

Sales ▾

Purchasing ▾



Customers

Vendors

Chart of Accounts

Posted Purchase Invoices

Register Customer Payments

Bar

Actions

+ Sales Order

+ Sales Invoice

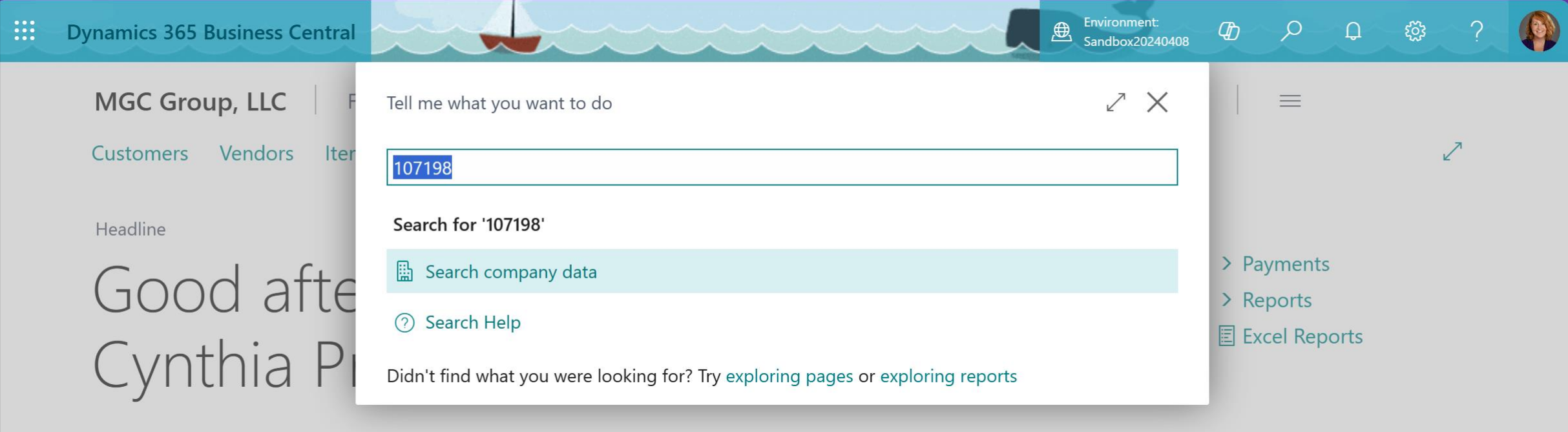
+ Purchase Invoice

> Find entries...

> Search in data...



Search company data



The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the application name, a decorative wave graphic with a sailboat, and the environment name 'Sandbox20240408'. A search bar is open, displaying the query '107198'. Below the search bar, a dropdown menu offers the option 'Search company data' (highlighted in light blue) and 'Search Help'. A message at the bottom of the search bar suggests exploring pages or reports if the search is unsuccessful. The background shows a navigation pane with 'MGC Group, LLC' and a main content area with a headline 'Good afternoon Cynthia P...'.



Searching company data Demo

The screenshot shows the Dynamics 365 Business Central interface for the 'NVS Training Company' in an 'Environment: Sandbox'. The navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. The main content area features a key insight: 'Your top customer was School of Fine Art, bought for \$23,102'. Below this, there are four summary cards for 'Sales This Month' (\$3,052), 'Overdue Sales Invoice Amount' (\$63,890), 'Overdue Purch. Invoice Amount' (\$49,422), and 'Sales Invoices Predicted Overdue' (0). The 'Ongoing Sales' section contains cards for Sales Quotes (2), Sales Orders (7), Completely Re... from Stock (0), and Sales Invoices (8). The 'Ongoing Purchases' section contains cards for Purchase Orders (6), Ongoing Purch... Invoices (7), and Purch. Invoices... Next Week (0). The 'Payments' section contains cards for Unprocessed Payments (1), Average Collec... Days (5.5), and Outstanding V... Invoices (14). An 'Incoming Documents' card shows 'My Incoming Documents' (1). At the bottom, there are tabs for 'User Tasks', 'Email Status', 'Approvals', and 'Intercompany'.



I want to find...



**...the attributes of an item from
the sales line to confirm I am
selecting the correct item**





S-ORD101004 · Alpine Ski House

[Home](#) Prepare Print/Send Request Approval Order Report | More options

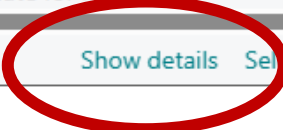
Post... | Release | Create Warehouse Shipment | Create Inventory Put-away/Pick... | Archive Document

General >

Lines | [Manage](#) Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax																								
→ Item	2000-S	SYDNEY Swivel Chair, green			3	-	PCS	190.10																								
<table border="1"> <thead> <tr> <th>No. ↑</th> <th>Description</th> <th>Base Unit of Measure</th> <th>Unit Price</th> </tr> </thead> <tbody> <tr> <td>→ 2000-S</td> <td>SYDNEY Swivel Chair, green</td> <td>PCS</td> <td>190.10</td> </tr> <tr> <td>F-100</td> <td>Remote pump</td> <td>PCS</td> <td>100.00</td> </tr> <tr> <td>F-101</td> <td>Paper Coffee Cups</td> <td>PCS</td> <td>2,400.00</td> </tr> <tr> <td>INSURANCE</td> <td>Annual Insurance Premium</td> <td>EA</td> <td>0.00</td> </tr> <tr> <td>PROJECT C...</td> <td>Project Total Price Estimate for ...</td> <td>EA</td> <td>0.00</td> </tr> </tbody> </table>									No. ↑	Description	Base Unit of Measure	Unit Price	→ 2000-S	SYDNEY Swivel Chair, green	PCS	190.10	F-100	Remote pump	PCS	100.00	F-101	Paper Coffee Cups	PCS	2,400.00	INSURANCE	Annual Insurance Premium	EA	0.00	PROJECT C...	Project Total Price Estimate for ...	EA	0.00
No. ↑	Description	Base Unit of Measure	Unit Price																													
→ 2000-S	SYDNEY Swivel Chair, green	PCS	190.10																													
F-100	Remote pump	PCS	100.00																													
F-101	Paper Coffee Cups	PCS	2,400.00																													
INSURANCE	Annual Insurance Premium	EA	0.00																													
PROJECT C...	Project Total Price Estimate for ...	EA	0.00																													
Subtotal Excl. Tax (USD)					570.30	Total Excl. Tax (USD)																										
Inv. Discount Amount Excl. Tax					0.00	Total Tax (USD)																										
Invoice Discount %					0	Total Incl. Tax (USD)																										



2000-S · SYDNEY Swivel Chair, green

[Home](#) | [Request Approval](#) | [Item](#) | [Prices & Discounts](#) | [More options](#)

📄 Copy Item | 📄 Adjust Inventory | 📄 Create Stockkeeping Unit | 📄 Apply Template

Item Show more

No.	<input type="text" value="2000-S"/>	...	Base Unit of Measure	<input type="text" value="PCS"/>	▼
Description	<input type="text" value="SYDNEY Swivel Chair, green"/>		Item Category Code	<input type="text" value="CHAIR"/>	▼
Blocked	<input type="checkbox"/>		Variant Mandatory if Exists	<input type="text" value="Default (No)"/>	▼
Type	<input type="text" value="Inventory"/>				▼

Inventory Show more

Shelf No.	<input type="text"/>	Stockout Warning	<input type="text" value="Default (Yes)"/>	▼
Quantity on Hand	<input type="text" value="38"/>	...	Unit Volume	<input type="text" value="0.25"/>
Qty. on Purch. Order	<input type="text" value="0"/>	Over-Receipt Code	<input type="text"/>	▼
Qty. on Sales Order	<input type="text" value="3"/>			

Costs & Posting Show more

Cost Details		Posting Details	
Costing Method	<input type="text" value="FIFO"/>	Gen. Prod. Posting Group	<input type="text" value="RETAIL"/>
Standard Cost	<input type="text" value="148.10"/>	Tax Group Code	<input type="text" value="FURNITURE"/>
Unit Cost	<input type="text" value="148.10"/>	Inventory Posting Group	<input type="text" value="RESALE"/>

📄 Details | 📄 Attachments (0)

Marketing Text

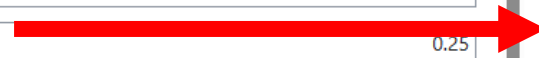
✎ Edit | 📄 Draft with Copilot

🌟
Create draft based on this item's attributes.

Item Attributes ▼

Attribute	Value
Color	Green
Depth	80 CM
Width	90 CM
Height	110 CM
Material Description	Cotton, S

Forecast ▼



2000-S · SYDNEY Swivel Chair, green

[Home](#) [Request Approval](#) [Item](#) [Prices & Discounts](#) | [More options](#)

📄 Copy Item 📦 Adjust Inventory 🏗 Create Stockkeeping Unit 🔄 Apply Template

Item

Show more

No.

Description

Blocked

Type

Inventory

Shelf No.

Quantity on Hand

Qty. on Purch. Order

Qty. on Sales Order

Costs & Posting

Show more

Cost Details

Costing Method

Standard Cost

Unit Cost

Net Invoiced Qty.

Posting Details

Gen. Prod. Posting Group

Tax Group Code

Inventory Posting Group

Default Deferral Template

Item Attribute Values - 2000-S · SYDNEY Swivel Chair, green

↗ ✕

Item Attribute Values 📄 New Line ✕ Delete Line

🔗 🗑

Attribute ↑	Value	Unit of Measure
Color	Green	
Depth	80	CM
Height	110	CM
→ Material Description	Cotton, Steel legs	
Width	90	CM

OK Cancel

📄 Details 📎 Attachments (0)

Marketing Text

✎ Edit 📄 Draft with Copilot

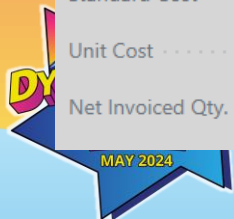
🌟
Create draft based on this item's attributes.

Item Attributes

Attribute	Value
Color	Green
Depth	80 CM
Width	90 CM
Height	110 CM
Material Description	Cotton, Steel legs

Forecast

Status Sales forecast not available for this item.



I want to find...



...a list of items filtered to data not available for selection from the filter pane



Filter by Attributes

Dynamics 365 Business Central

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

Items: All | + New | Delete | Home | Item | Prices & Discounts | **Attributes** | Report | More options

No. ↑	Description	Type	Quantity on Hand	Substi... Exist	Assem... BOM		Unit Cost	Unit Price	Vendor No.
1896-S	ATHENS Desk	Inventory	4	No	No		780.70	1,000.80	30000
1900-S	PARIS Guest Chair, black	Inventory	0	No	No	PCS	150.30	192.80	20000
1906-S	ATHENS Mobile Pedestal	Inventory	5	No	No	PCS	338.20	433.60	30000
1908-S	LONDON Swivel Chair, blue	Inventory	3	No	No	PCS	148.10	190.10	30000
1920-S	ANTWERP Conference Table	Inventory	10	No	No	PCS	505.40	647.80	20000
1925-W	Conference Bundle 1-6	Inventory	0	No	Yes	PCS	0.00	188.80	
1928-S	AMSTERDAM Lamp	Inventory	8	No	No	PCS	42.80	54.90	10000
1929-W	Conference Bundle 1-8	Inventory	0	No	Yes	PCS	0.00	233.80	

Attributes

- Filter by Attributes
- Clear Attributes Filter



Filter entries by Dimensions

General Ledger Entries | Home | Review Entries | Actions | Related | Automate | Fewer options

Find entries... | Reverse Transaction... | Correct Dimensions | Entry

- Dimensions
- Value Entries
- G/L Dimension Overview
- Set Dimension Filter...

Posting Date	Document Type	Document No.	G/L Account No.	Description	Department Code	Customergro... Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Posti
→ 4/1/2024	:	109001	50110	Direct Cost					
4/1/2024		109001	50110	Direct Cost					
4/1/2024		108001	50110	Direct Cost					
4/1/2024		108001	50110	Direct Cost on 04/01/24					
4/1/2024		PS-INV103198	50110	Direct Cost 30000 on 04/01/24	SALES	LARGE			
4/1/2024		PS-INV103198	50110	Direct Cost 30000 on 04/01/24	SALES	LARGE			
3/31/2024		PS-INV103197	50110	Direct Cost 50000 on 03/31/24	SALES	MEDIUM			
3/31/2024		PS-INV103197	50110	Direct Cost 50000 on 03/31/24	SALES	MEDIUM			
3/27/2024		PS-INV103196	50110	Direct Cost 30000 on 03/27/24	SALES	LARGE			
3/27/2024		PS-INV103196	50110	Direct Cost 30000 on 03/27/24	SALES	LARGE			



I want to find...



**...the BC version my company is
using**



Help & Support

The screenshot shows the Dynamics 365 Business Central interface. The main content area is titled "Help & Support" and includes sections for "Give feedback", "Troubleshooting", and "Report a problem".

Troubleshooting section:

- Version: US Business Central 24.0 (Platform 24.0.19566.0 + Application 24.0.16410.17628)
- View the last known error
- Inspect pages and data
- Analyze performance
- Enable additional logging
- Attach debugger to this session

Report a problem section:

- Your administrator or Business Central reselling partner has not specified any support information.
- Copy the text below and add it to your support request:
- Microsoft Entra tenant ID: 564b3dbe
- Session ID (client): fd6db188-b1d4-494d-9b6d-87151c5bac7b
- Session ID (server): 800182
- User telemetry ID: 27739846-6980-43ea-9d6e-fe010a30c8ba

The "Help" sidebar on the right contains a search bar and several resource categories. A red arrow points to the "Help & Support" link under the "Other resources" section.



I want to find...



**...all shipments and invoices
related to this order**



Quantity Shipped, Invoiced

Dynamics 365 Business Central

Environment: Sandbox

Sales Order

S-ORD101003 · School of Fine Art

Home Prepare Print/Send Request Approval **Order** Report More options

Dimensions Statistics Comments Attachments Approvals Invoices Customer Shipments

General

Customer No. 30000 Due Date 2/29/2024

Customer Name School of Fine Art Requested Delivery Date 2/26/2024

Contact Meagan Bond External Document No. CUSTOMER PO1011569

Posting Date 2/28/2024 Status Released

Document Date 2/28/2024 Workflow Queue

Order Date 2/1/2024

Lines

Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Quantity	Location Code	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Qty. to Ship	Quantity Shipped	Qty. to Invoice	Quantity Invoiced	Blanket Order No.	Blar
Item	1920-S	ANTWERP Conference Table	8		PCS	647.80	MIAMI, FL	1	7	2	6		
G/L Account	50200	Freight charge	1			550.00	MIAMI, FL		1		1		

Subtotal Excl. Tax (USD) 5,732.40 Total Excl. Tax (USD) 5,732.40

Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 362.77

Invoice Discount % 0 Total Incl. Tax (USD) 6,095.17

Invoice Details >

CM Yes MIAMI, FL



I want to find...



**...the invoice for a specific
shipment**



Item Invoice Lines

Posted Sales Shipment ✎ ↶ + 🗑

S-SHPT102215 · Trey Research

[Home](#) | Shipment | Certificate of Supply | More options

✎ Update Document 🖨 Print... 🔍 Find entries... 📦 Track Package

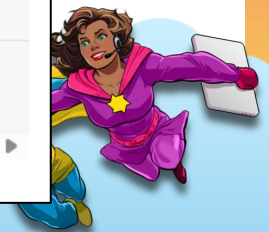
General Show more

No.	S-SHPT102215	Requested Delivery Date	
Customer	Trey Research	Promised Delivery Date	
Contact	Helen Ray	Quote No.	
Posting Date	4/10/2023	Order No.	S-ORD101008

Lines | Functions | Line ↶ ↷

📏 Dimensions 💬 Comments 📄 Item Tracking Entries 🔗 Assemble-to-Order 📄 Item Invoice Lines 🔍 Document Line Tracking 🔗

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Quantity Invoiced	Planned Delivery Date	Planned Shipment Date
→ <u>Item</u>	:	2000-S	SYDNEY Swivel Chair, green		4	PCS	4	4/10/2023	4/10/2023



I want to find...



**...records in a list based on certain
criteria**



Head-to-Head Battle

**SEARCH
IN LIST**

VS

**FILTER
IN LIST**



SEARCH IN LIST Demo

Dynamics 365 Business Central

Environment: Sandbox

Items

Items: All Search Analyze + New Manage Home Prices & Discounts Item Attributes Report More options

Adjust Inventory Copy Item

No. ↑	Description	Unit Cost	Costing Method	Standard Cost	Lead Time Calculation	Quantity on Hand	Type	Last Date Modified	Unit Price	Item Category Code	Item Tracking Code	Subst... Exist	Assem... BOM	Base Unit of Measure	Cost is Adj...	Vendor No
1000	BERLIN Guest Chair, yellow	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1896-S	ATHENS Desk	780.70	FIFO	0.00		123	Inventory	3/28/2022	1,000.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000
1900-S	PARIS Guest Chair, black	150.30	FIFO	0.00		90	Inventory	2/16/2021	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1906-S	ATHENS Mobile Pedestal	338.20	FIFO	0.00		5	Inventory	2/16/2021	433.60	TABLE		No	No	PCS	<input checked="" type="checkbox"/>	30000
1908-S	LONDON Swivel Chair, blue	148.10	FIFO	0.00		3	Inventory	2/16/2021	190.10	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000
1920-S	ANTWERP Conference Table	505.40	FIFO	0.00		20	Inventory	2/16/2021	647.80	TABLE		No	No	PCS	<input checked="" type="checkbox"/>	20000
1925-W	Conference Bundle 1-6	0.00	FIFO	0.00		0	Inventory	2/16/2021	188.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1928-S	AMSTERDAM Lamp	42.80	FIFO	0.00		8	Inventory	2/16/2021	54.90	MISC		No	No	PCS	<input checked="" type="checkbox"/>	10000
1929-W	Conference Bundle 1-8	0.00	FIFO	0.00		0	Inventory	2/16/2021	233.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1936-S	BERLIN Guest Chair, yellow	150.30	FIFO	0.00		100	Inventory	2/19/2021	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1953-W	Guest Section 1	0.00	FIFO	0.00		-49	Inventory	2/16/2021	125.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1960-S	ROME Guest Chair, green	150.30	FIFO	0.00		2	Inventory	2/16/2021	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1964-S	TOKYO Guest chair, blue	150.30	FIFO	0.00		4	Inventory	3/19/2024	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1965-W	Conference Bundle 2-8	0.00	FIFO	0.00		-81	Inventory	2/16/2021	233.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1968-S	MEXICO Swivel Chair, black	148.10	FIFO	0.00		10	Inventory	7/22/2021	190.10	CHAIR		Yes	No	PCS	<input checked="" type="checkbox"/>	30000
1969-W	Conference Package 1	0.00	FIFO	0.00		-7	Inventory	2/16/2021	341.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1972-S	MUNICH Swivel Chair, yellow	148.10	FIFO	0.00		0	Inventory	2/19/2021	190.10	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000
1980-S	MOSCOW Swivel Chair, red	148.10	FIFO	0.00		0	Inventory	2/16/2021	190.10	CHAIR		Yes	No	PCS	<input checked="" type="checkbox"/>	30000
1988-S	SEOUL Guest chair, red	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		Yes	No	PCS	<input checked="" type="checkbox"/>	20000
1992-S	Denver Guest Chair, pink	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		No	No		<input checked="" type="checkbox"/>	20000
1996-S	ATLANTA Whiteboard, base	1,089.90	FIFO	0.00		10	Inventory	2/16/2021	1,397.30	MISC		No	No	PCS	<input checked="" type="checkbox"/>	30000
2000-S	SYDNEY Swivel Chair, green	148.10	FIFO	0.00		38	Inventory	7/22/2021	190.10	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000



FILTER IN LIST Demo

Dynamics 365 Business Central

Environment Sandbox

Items

Items: All Search Analyze + New Manage Home Prices & Discounts Item Attributes Report More options

Adjust Inventory Copy Item

No. ↑	Description	Unit Cost	Costing Method	Standard Cost	Lead Time Calculation	Quantity on Hand	Type	Last Date Modified	Unit Price	Item Category Code	Item Tracking Code	Substi... Exist	Assem... BOM	Base Unit of Measure	Cost is Adj...	Vendor No
1000	BERLIN Guest Chair, yellow	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1896-S	ATHENS Desk	780.70	FIFO	0.00		123	Inventory	3/28/2022	1,000.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000
1900-S	PARIS Guest Chair, black	150.30	FIFO	0.00		90	Inventory	2/16/2021	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1906-S	ATHENS Mobile Pedestal	338.20	FIFO	0.00		5	Inventory	2/16/2021	433.60	TABLE		No	No	PCS	<input checked="" type="checkbox"/>	30000
1908-S	LONDON Swivel Chair, blue	148.10	FIFO	0.00		3	Inventory	2/16/2021	190.10	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000
1920-S	ANTWERP Conference Table	505.40	FIFO	0.00		20	Inventory	2/16/2021	647.80	TABLE		No	No	PCS	<input checked="" type="checkbox"/>	20000
1925-W	Conference Bundle 1-6	0.00	FIFO	0.00		0	Inventory	2/16/2021	188.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1928-S	AMSTERDAM Lamp	42.80	FIFO	0.00		8	Inventory	2/16/2021	54.90	MISC		No	No	PCS	<input checked="" type="checkbox"/>	10000
1929-W	Conference Bundle 1-8	0.00	FIFO	0.00		0	Inventory	2/16/2021	233.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1936-S	BERLIN Guest Chair, yellow	150.30	FIFO	0.00		100	Inventory	2/19/2021	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1953-W	Guest Section 1	0.00	FIFO	0.00		-49	Inventory	2/16/2021	125.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1960-S	ROME Guest Chair, green	150.30	FIFO	0.00		2	Inventory	2/16/2021	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1964-S	TOKYO Guest chair, blue	150.30	FIFO	0.00		4	Inventory	3/19/2024	192.80	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	20000
1965-W	Conference Bundle 2-8	0.00	FIFO	0.00		-81	Inventory	2/16/2021	233.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1968-S	MEXICO Swivel Chair, black	148.10	FIFO	0.00		10	Inventory	7/22/2021	190.10	CHAIR		Yes	No	PCS	<input checked="" type="checkbox"/>	30000
1969-W	Conference Package 1	0.00	FIFO	0.00		-7	Inventory	2/16/2021	341.80			No	Yes	PCS	<input checked="" type="checkbox"/>	
1972-S	MUNICH Swivel Chair, yellow	148.10	FIFO	0.00		0	Inventory	2/19/2021	190.10	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000
1980-S	MOSCOW Swivel Chair, red	148.10	FIFO	0.00		0	Inventory	2/16/2021	190.10	CHAIR		Yes	No	PCS	<input checked="" type="checkbox"/>	30000
1988-S	SEOUL Guest chair, red	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		Yes	No	PCS	<input checked="" type="checkbox"/>	20000
1992-S	Denver Guest Chair, pink	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		No	No		<input checked="" type="checkbox"/>	20000
1996-S	ATLANTA Whiteboard, base	1,089.90	FIFO	0.00		10	Inventory	2/16/2021	1,397.30	MISC		No	No	PCS	<input checked="" type="checkbox"/>	30000
2000-S	SYDNEY Swivel Chair, green	148.10	FIFO	0.00		38	Inventory	7/22/2021	190.10	CHAIR		No	No	PCS	<input checked="" type="checkbox"/>	30000



ADDITIONAL FILTERING SYMBOLS

? *	Wild Card - ?one unknown - *multiple unknown
..	Range
	Pipe
..	Combinations
<>	Not
"	Blank
@	Case Insensitive
t 31 0831	Date Entry and Date Filters
%mycustomers	Token Filter



ADDITIONAL FILTERING SYMBOLS Demo

Dynamics 365 Business Central

Items

Items: All Search Analyze + New Manage Home Prices & Discounts Item Attributes Report More options

Adjust Inventory Copy Item

Views

- All
- My Items
- Desk and Chairs
- Chairs that we need to sell asap
- Chairs - order now
- Blank Item Category
- All [Copy]
- Tables
- Low stock chairs, no subs

Filter list by:

+ Filter...

Filter totals by...

Reset filters

No. ↑	Description	Unit Cost	Costing Method	Standard Cost	Lead Time Calculation	Quantity on Hand	Type	Last Date Modified	Unit Price	Item Category Code	Item Tracking Code	Substi... Exist
1000	BERLIN Guest Chair, yellow	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		No
1896-S	ATHENS Desk	780.70	FIFO	0.00		123	Inventory	3/28/2022	1,000.80	CHAIR		No
1900-S	PARIS Guest Chair, black	150.30	FIFO	0.00		90	Inventory	2/16/2021	192.80	CHAIR		No
1906-S	ATHENS Mobile Pedestal	338.20	FIFO	0.00		5	Inventory	2/16/2021	433.60	TABLE		No
1908-S	LONDON Swivel Chair, blue	148.10	FIFO	0.00		3	Inventory	2/16/2021	190.10	CHAIR		No
1920-S	ANTWERP Conference Table	505.40	FIFO	0.00		20	Inventory	2/16/2021	647.80	TABLE		No
1925-W	Conference Bundle 1-6	0.00	FIFO	0.00		0	Inventory	2/16/2021	188.80			No
1928-S	AMSTERDAM Lamp	42.80	FIFO	0.00		8	Inventory	2/16/2021	54.90	MISC		No
1929-W	Conference Bundle 1-8	0.00	FIFO	0.00		0	Inventory	2/16/2021	233.80			No
1936-S	BERLIN Guest Chair, yellow	150.30	FIFO	0.00		100	Inventory	2/19/2021	192.80	CHAIR		No
1953-W	Guest Section 1	0.00	FIFO	0.00		-49	Inventory	2/16/2021	125.80			No
1960-S	ROME Guest Chair, green	150.30	FIFO	0.00		2	Inventory	2/16/2021	192.80	CHAIR		No
1964-S	TOKYO Guest chair, blue	150.30	FIFO	0.00		4	Inventory	3/19/2024	192.80	CHAIR		No
1965-W	Conference Bundle 2-8	0.00	FIFO	0.00		-81	Inventory	2/16/2021	233.80			No
1968-S	MEXICO Swivel Chair, black	148.10	FIFO	0.00		10	Inventory	7/22/2021	190.10	CHAIR		Yes
1969-W	Conference Package 1	0.00	FIFO	0.00		-7	Inventory	2/16/2021	341.80			No
1972-S	MUNICH Swivel Chair, yellow	148.10	FIFO	0.00		0	Inventory	2/19/2021	190.10	CHAIR		No
1980-S	MOSCOW Swivel Chair, red	148.10	FIFO	0.00		0	Inventory	2/16/2021	190.10	CHAIR		Yes
1988-S	SEOUL Guest chair, red	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		Yes
1992-S	Denver Guest Chair, pink	150.30	FIFO	0.00		0	Inventory	3/19/2024	192.80	CHAIR		No
1996-S	ATLANTA Whiteboard, base	1,089.90	FIFO	0.00		10	Inventory	2/16/2021	1,397.30	MISC		No
2000-S	SYDNEY Swivel Chair, green	148.10	FIFO	0.00		38	Inventory	7/22/2021	190.10	CHAIR		No



I want to find...



**...the invoices related to a
payment**



Like Matching Socks



Applied Entries Demo

Dynamics 365 Business Central

40000 - Wide World Importers

Vendor Ledger Entries: All | Search | Analyze | Edit List | Home | Entry | More options

Show Document | Apply Entries | Find entries... | Create Payment | Reverse Transaction...

Posting Date	Document Date	Document Type	Document No.	Vendor No. ↓	Description	Original Amount	Amount	Remaining Amount	Due Date	IRS 1099 Code	IRS 1099 Amount	Pmt. Discount Date	Open	On Hold
3/19/2024	3/19/2024	Payment	G04010	40000	Wide World Importers	13,863.53	13,863.53	0.00	3/19/2024		0.00		<input type="checkbox"/>	<input type="checkbox"/>
→ 4/10/2023	4/10/2023	Payment	G04001	40000	Wide World Importers	4,329.57	4,329.57	0.00	4/10/2023		0.00		<input type="checkbox"/>	<input type="checkbox"/>
3/16/2023	3/16/2023	Invoice	108206	40000	Invoice 107206	-1,115.23	-1,115.23	0.00	3/31/2023		0.00	3/16/2023	<input type="checkbox"/>	<input type="checkbox"/>
3/15/2023	3/15/2023	Invoice	108205	40000	Invoice 107205	-13,863.53	-13,863.53	0.00	3/31/2023		0.00	3/15/2023	<input type="checkbox"/>	<input type="checkbox"/>
3/9/2023	3/9/2023	Invoice	108197	40000	Invoice 107197	-3,214.34	-3,214.34	0.00	3/31/2023		0.00	3/9/2023	<input type="checkbox"/>	<input type="checkbox"/>
2/15/2023	2/15/2023	Payment	108193	40000	Invoice 107193	796.59	796.59	0.00	2/15/2023		0.00		<input type="checkbox"/>	<input type="checkbox"/>
2/15/2023	2/15/2023	Invoice	108193	40000	Invoice 107193	-796.59	-796.59	0.00	2/15/2023		0.00	2/15/2023	<input type="checkbox"/>	<input type="checkbox"/>
2/14/2023	2/14/2023	Payment	108192	40000	Invoice 107192	11,552.94	11,552.94	0.00	2/14/2023		0.00		<input type="checkbox"/>	<input type="checkbox"/>
2/14/2023	2/14/2023	Invoice	108192	40000	Invoice 107192	-11,552.94	-11,552.94	0.00	2/14/2023		0.00	2/14/2023	<input type="checkbox"/>	<input type="checkbox"/>
2/9/2023	2/9/2023	Payment	108184	40000	Invoice 107184	3,214.34	3,214.34	0.00	2/9/2023		0.00		<input type="checkbox"/>	<input type="checkbox"/>
2/9/2023	2/9/2023	Invoice	108184	40000	Invoice 107184	-3,214.34	-3,214.34	0.00	2/9/2023		0.00	2/9/2023	<input type="checkbox"/>	<input type="checkbox"/>
1/16/2023	1/16/2023	Payment	108180	40000	Invoice 107180	955.91	955.91	0.00	1/16/2023		0.00		<input type="checkbox"/>	<input type="checkbox"/>
1/16/2023	1/16/2023	Invoice	108180	40000	Invoice 107180	-955.91	-955.91	0.00	1/16/2023		0.00	1/16/2023	<input type="checkbox"/>	<input type="checkbox"/>
1/15/2023	1/15/2023	Payment	108179	40000	Invoice 107179	8,087.06	8,087.06	0.00	1/15/2023		0.00		<input type="checkbox"/>	<input type="checkbox"/>
1/15/2023	1/15/2023	Invoice	108179	40000	Invoice 107179	-8,087.06	-8,087.06	0.00	1/15/2023		0.00	1/15/2023	<input type="checkbox"/>	<input type="checkbox"/>
1/9/2023	1/9/2023	Payment	108171	40000	Invoice 107171	3,214.34	3,214.34	0.00	1/9/2023		0.00		<input type="checkbox"/>	<input type="checkbox"/>
1/9/2023	1/9/2023	Invoice	108171	40000	Invoice 107171	-3,214.34	-3,214.34	0.00	1/9/2023		0.00	1/9/2023	<input type="checkbox"/>	<input type="checkbox"/>
12/16/2022	12/16/2022	Payment	108168	40000	Invoice 107168	318.64	318.64	0.00	12/16/2022		0.00		<input type="checkbox"/>	<input type="checkbox"/>
12/16/2022	12/16/2022	Invoice	108168	40000	Invoice 107168	-318.64	-318.64	0.00	12/16/2022		0.00	12/16/2022	<input type="checkbox"/>	<input type="checkbox"/>
12/10/2022	12/10/2022	Payment	108159	40000	Invoice 107159	477.95	477.95	0.00	12/10/2022		0.00		<input type="checkbox"/>	<input type="checkbox"/>
12/10/2022	12/10/2022	Invoice	108159	40000	Invoice 107159	-477.95	-477.95	0.00	12/10/2022		0.00	12/10/2022	<input type="checkbox"/>	<input type="checkbox"/>
12/9/2022	12/9/2022	Payment	108157	40000	Invoice 107157	1,071.45	1,071.45	0.00	12/9/2022		0.00		<input type="checkbox"/>	<input type="checkbox"/>
12/9/2022	12/9/2022	Invoice	108157	40000	Invoice 107157	-1,071.45	-1,071.45	0.00	12/9/2022		0.00	12/9/2022	<input type="checkbox"/>	<input type="checkbox"/>
12/1/2022	12/1/2022	Payment	108015	40000	Invoice 107015	4,395.61	4,395.61	0.00	12/1/2022		0.00		<input type="checkbox"/>	<input type="checkbox"/>
12/1/2022	12/1/2022	Invoice	108015	40000	Invoice 107015	-4,395.61	-4,395.61	0.00	12/1/2022		0.00	12/1/2022	<input type="checkbox"/>	<input type="checkbox"/>
12/1/2022	12/1/2022	Payment	108014	40000	Invoice 107014	14,338.62	14,338.62	0.00	12/1/2022		0.00		<input type="checkbox"/>	<input type="checkbox"/>
12/1/2022	12/1/2022	Invoice	108014	40000	Invoice 107014	-14,338.62	-14,338.62	0.00	12/1/2022		0.00	12/1/2022	<input type="checkbox"/>	<input type="checkbox"/>



I want to find...



**...a posted document and it's not
there**



Find Entries Demo

Dynamics 365 Business Central

Environment: Sandbox

60200 Advertising Expense

General Ledger Entries | Search | Analyze | Edit List | Home | Review Entries | More options

Find entries... | Reverse Transaction... | Correct Dimensions | Entry

Posting Date	Document Type	Document No.	G/L Account No.	Job No.	Description	Department Code	Customergroup Code	Amount	Source Code	Source Type	Source No.	Item type Code
11/15/2023	Invoice	108217	60200		Invoice 107217			325.00	PURCHASES	Vendor	30000	-
→ 10/30/2023	Invoice	108219	60200		Invoice 107210			150.00	PURCHASES	Vendor	20000	-
10/25/2023	Invoice	10389329	60200		Help with advertising			500.00	PURCHJNL	Vendor	10000	-
7/1/2021		G00005	60200		Accrual for June Supplies			-100.00	GENJNL			-
6/30/2021		G00004	60200		Accrual for June Supplies			100.00	GENJNL			-
6/1/2021		G00003	60200		Accrual for May Supplies			-100.00	GENJNL			-
5/31/2021		G00002	60200		Accrual for May Supplies			100.00	GENJNL			-
4/30/2021		G00001	60200		Accrual for April Supplies			100.00	GENJNL			-



Can we delete documents?

Purchases & Payables Setup

Vendor Posting Groups | Incoming Documents Setup | More options

General Show less

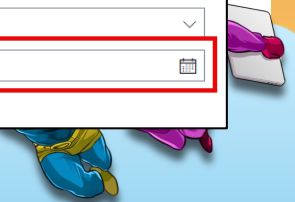
Discount Posting	All Discounts	Check Prepm. when Posting	<input type="checkbox"/>
Receipt on Invoice	<input checked="" type="checkbox"/>	Prepm. Auto Update Frequency	Never
Return Shipment on Credit Memo	<input type="checkbox"/>	Default Posting Date	Work Date
Invoice Rounding	<input checked="" type="checkbox"/>	Default Qty. to Receive	Remainder
Create Item from Item No.	<input type="checkbox"/>	Combine Special Orders Default	Always Combine
Copy Vendor Name to Entries	<input checked="" type="checkbox"/>	Use Vendor's Tax Area Code	<input type="checkbox"/>
Ext. Doc. No. Mandatory	<input checked="" type="checkbox"/>	Auto Post Non-Inv. via Whse. ...	
Allow Tax Difference	<input checked="" type="checkbox"/>	Allow Document Deletion Before	
Calc. Inv. Discount	<input type="checkbox"/>	Allow Multiple Posting Groups	

Sales & Receivables Setup

Customer Groups | Payments | More options

General Show less

Discount Posting	All Discounts	Copy Cmts Ret.Ord. to Cr. Memo	<input checked="" type="checkbox"/>
Credit Warnings	Both Warnings	Copy Cmts Ret.Ord. to Ret.Rcpt	<input checked="" type="checkbox"/>
Stockout Warning	<input checked="" type="checkbox"/>	Allow Tax Difference	<input checked="" type="checkbox"/>
Shipment on Invoice	<input checked="" type="checkbox"/>	Calc. Inv. Discount	<input type="checkbox"/>
Return Receipt on Credit Memo	<input type="checkbox"/>	Tax Bus. Posting Gr. (Price)	
Invoice Rounding	<input checked="" type="checkbox"/>	Exact Cost Reversing Mandatory	<input type="checkbox"/>
Default Item Quantity	<input type="checkbox"/>	Check Prepm. when Posting	<input type="checkbox"/>
Create Item from Item No.	<input type="checkbox"/>	Prepm. Auto Update Frequency	Never
Create Item from Description	<input type="checkbox"/>	Allow Document Deletion Before	
Copy Customer Name to Entries	<input type="checkbox"/>	Allow Multiple Posting Groups	<input type="checkbox"/>



Deleting a document DOES NOT delete the related entries

General Ledger Entries | Search | Analyze | Edit List | Home | Review Entries | More options

Find entries... | Reverse Transaction... | Correct Dimensions | Entry ▾

Posting Date ↓	Document Type	Document No.	G/L Account No. ↓ ▾	Job No.	Description	Amount	Source Code
→ 11/15/2023	Invoice	108217	60200		Invoice 107217	325.00	PURCHASES
10/30/2023	Invoice	108219	60200		Invoice 107210	150.00	PURCHASES
10/25/2023	Invoice	10389329	60200		Help with advertising	500.00	PURCHJNL



What if I want to “undo” a posted document?

↩ Correct

✗ Cancel

📄 Create Corrective Credit Memo

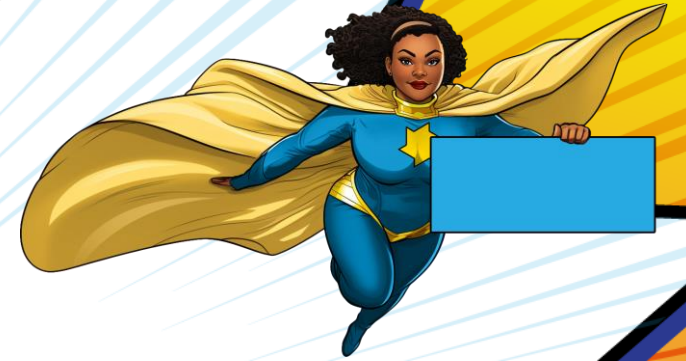
	Credit Memo created	User can review CM before posting	Automatic application of CM to original invoice	New invoice created
Create Corrective Credit Memo	✓	✓	✓	
Cancel	✓		✓	
Correct	✓		✓	✓

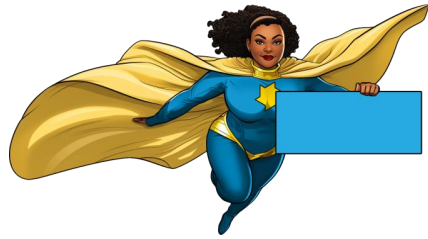


I want to find...



Superheroes with Questions





Thank you for attending!



Cynthia Priebe

Sharing the Righter Way
Cynthia@cynthiapriebe.com

Add us on
LinkedIn!



Cari Corozza

New View Strategies
Cari@getyournewview.com

