

DYNAMICS CON

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DUG



Top 20 Things You Should Not Do in Dynamics 365 Business Central

Presenters: Kristen Hosman and Shannon Mullins

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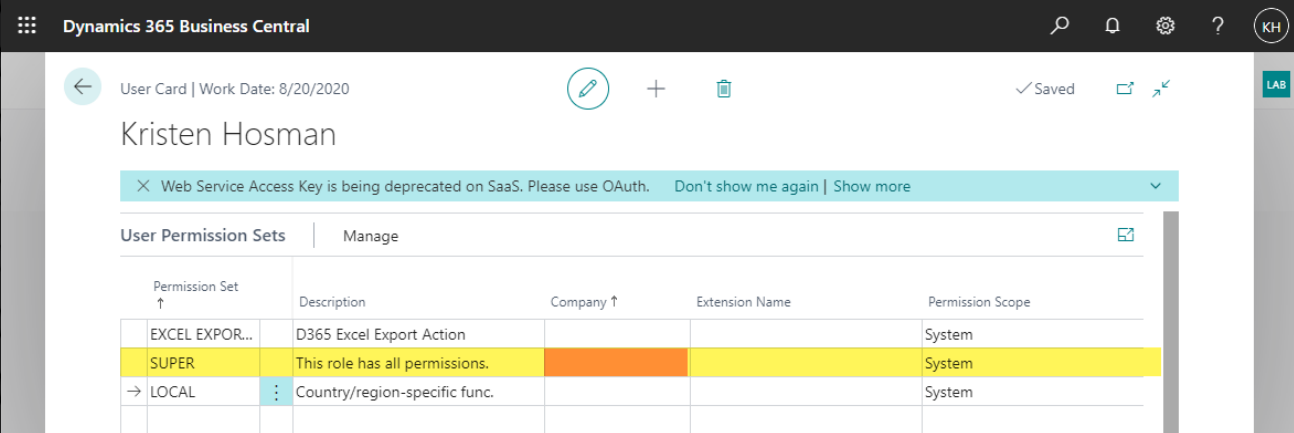
Why are we here?

We've taken the time to connect with other consultants, ISV's, and users to produce a list of 20 things you should never do in Dynamics 365 Business Central. Let's learn from each other's mistake so that we never find ourselves in a situation that isn't very desirable.

#1 User Security

User security defines what the user has access to within the system and what they're able to do. Couple of things to remember:

- Don't assign users the SUPER user permission set unless they are of system admin level.
- Don't forget to assign company level security if you have multiple companies.
- Do review the predefined user groups permissions to make sure you are giving the right amount of security and not too much.



The screenshot shows the Dynamics 365 Business Central interface. At the top, it says "Dynamics 365 Business Central". Below that, the "User Card" for "Kristen Hosman" is displayed, with a "Work Date" of 8/20/2020. A notification banner states: "Web Service Access Key is being deprecated on SaaS. Please use OAuth. Don't show me again | Show more". Below the notification, the "User Permission Sets" section is visible, with a "Manage" link. A table lists the permission sets assigned to the user:

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
EXCEL EXPOR...	D365 Excel Export Action			System
SUPER	This role has all permissions.			System
→ LOCAL	Country/region-specific func.			System

#2 Customizations

Don't adjust the system to meet your processes just because you can...first try to adjust your processes to the system.



Shawn Dorward | #MVPbuzz
@LifeHacks365com

Replying to @1ShannonMullin1 @KristenHosman and 2 others

Don't adjust the system to meet your processes, just because you can... first try to adjust your processes to the system. [#lifehacks365](#)



Matthew Perren
@MatthewPerren1

Replying to @1ShannonMullin1 @KristenHosman and 2 others

Are you **sure** that extension doesn't just replicate existing functionality that you don't know about/haven't bothered to check? (In my defence this is from when I was the client and the partner charged me to do dev that replicated something I later found NAV already did.)

#3 Change Log

The change log lets you track all direct modifications a user makes to data in the database. You must specify each table and field that you want the system to log and then you must activate the change log.

1. Change log setup > activate
2. Change log setup (table) list
3. Retention policy

Edit - Change Log Setup (Table) List

🔍 vendor		✕		🔧 Edit List		📄 Open in Excel	
		ID ↑		Name	Log Insertion	Log Modification	
→		23	⋮	Vendor	Some Fields	Some Fields	
		24		Vendor Invoice Disc.			
		25		Vendor Ledger Entry			
		93		Vendor Posting Group			



Jeremy Vyska #WearAMask #bytStrategiNu 🇸🇪
@JeremyVyska

Replying to @1ShannonMullin1 @KristenHosman and 2 others

Overuse/underuse the Change Log system.

I have customers without it on their key setup tables. I have customers who monitor an absurd amount of changes on master data.



David Singleton
@DFCSingleton

Replying to @JeremyVyska @1ShannonMullin1 and 3 others

It's not possible to under use Change Log 🤔🤔🤔

6:36 AM · Jan 24, 2021 · Twitter Web App



The Business Central Nerd @elnerddebrc · Jan 24
Replying to @DFCSingleton @JeremyVyska and 4 others

😊 yes, I would even include a new tracking event:

- ✓ Insert
- ✓ Modify
- ✓ Delete
- ✓ User check left and right to ensure nobody is looking at him, but refrain from continue.

#4 Direct Posting

Remember to turn off direct posting on all “control” accounts.

- Cash accounts (bank accounts)
- Accounts receivables
- Inventory
- Fixed assets
- Accounts payable



G/L Account Card | Work Date: 8/20/2020

10100 · Checking account

Process Account Balance | More options

General

General Journals | Work Date: 8/20/2020

Posting Date	Document Type	Document No.	Account Type	Account Category	Account Subcategory
12/31/2017		*	G/L Acco		

Batch Name: DEFAULT

No. 10100

Name: Checking account

Balance Sheet

Assets

Cash

Balance: 1,985.40

Reconciliation Account: ☒

Automatic Ext. Text: ☐

Direct Posting: ☒

Blocked: ☐

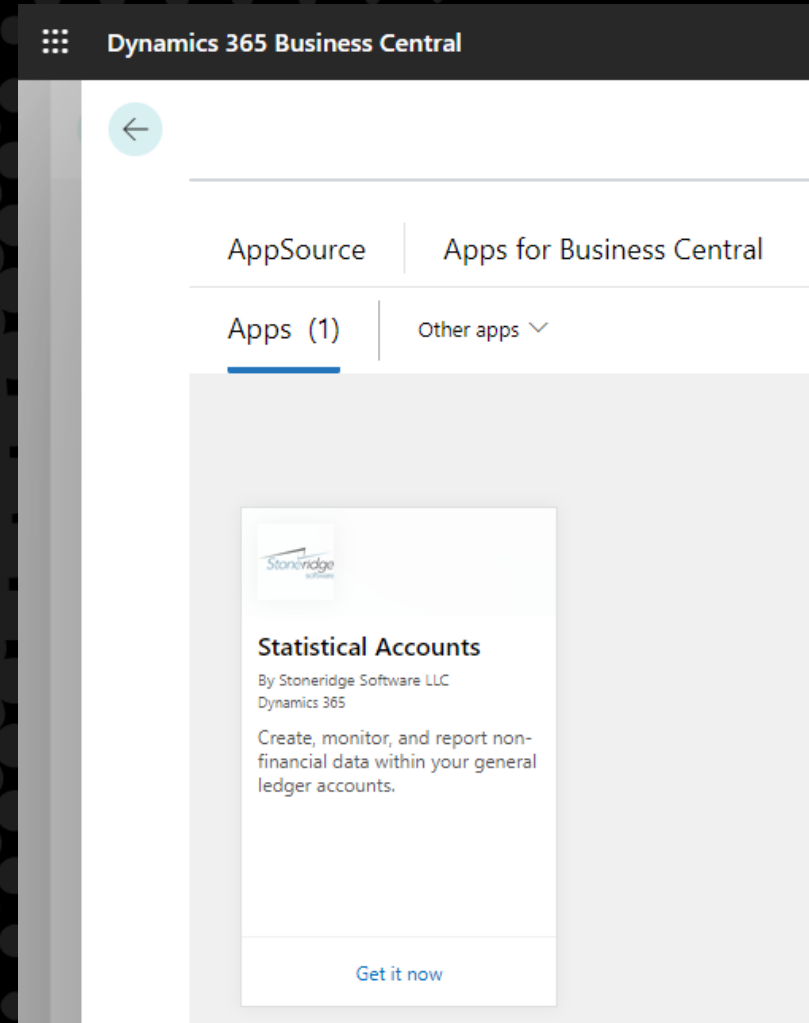
Account Type dropdown: G/L Account, Customer, Vendor, Bank Account, Fixed Asset, IC Partner, Employee

#5 Extension Management

Don't install new "Apps" into production environment without testing in sandbox environment first.

- You could mess with current processes.
- You could break a customization you already have in the system.

Do look at this customization by Stoneridge Software if you have the need of reporting on statistical accounts.



#6

Personalization's

Avoid having users personalize their own environments. Instead utilize “profile roles” so personalization's only have to be done once and then can be shared across other users.

Kristen Hosman – Personalizing Dynamics 365 Business Central

<https://www.youtube.com/watch?v=pQ32Utk-nek>

Top Screenshot: Dynamics 365 Business Central Settings

CRONUS USA, Inc. | < Finance > Cash Management > Sales > Purchasing > Setup & Ext

Customers Vendors Items Bank Accounts Chart of Accounts Deposits General Ledger Setup

Headline: Good evening, Kristen Hosman!

Actions: + Sales Invoice > Payments, + Purchase Invoice > Reports, > New > Setup

Settings

- Dynamics 365 Business Central
- Personalize My Settings
- Company information
- Assisted setup
- Advanced settings
- Admin Center

Callout: User personalization. Cannot be shared with other users.

Bottom Screenshot: Dynamics 365 Business Central Profiles (Roles)

Profiles (Roles) | Work Date: 8/20/2020

Profiles (Roles): All | Search + New Manage Use as default profile

Profile ID ↑	Display Name	Source	Role Center ID ↓	Ena...
*DYNAMICSCON	Super Hero	(User-created)	9022	<input checked="" type="checkbox"/>
ACCOUNTANT	Accountant	Base Application	9027	<input checked="" type="checkbox"/>
ACCOUNTING MANAGER	Accounting Manager	Base Application	9001	<input type="checkbox"/>
ACCOUNTING SERVICES	Outsourced Accounting Mana...	Base Application	9023	<input type="checkbox"/>
ADMIN	Administration	Base Application	8900	<input checked="" type="checkbox"/>

Callout: Profile roles can be shared (assigned) with other users.

#7 Allow Posting From/To

Don't leave the allow posting from and allow posting to blank in the general ledger setup window.

Do populate the allow posting from and allow posting to within the user setup window for those users that need the ability to post outside of the global settings in the general ledger setup window.

The top screenshot shows the 'General Ledger Setup' window in Dynamics 365 Business Central. The 'General' tab is selected, and the 'Allow Posting From' and 'Allow Posting To' fields are highlighted in yellow. The 'Allow Posting From' field is set to 3/1/2021, and the 'Allow Posting To' field is set to 3/31/2021. The 'LCY Code' is set to USD, and the 'Local Currency Symbol' is set to \$.

The bottom screenshot shows the 'User Setup' window in Dynamics 365 Business Central. The 'Work Date' is 8/20/2020. The 'Allow Posting From' and 'Allow Posting To' fields are highlighted in yellow. The 'Allow Posting From' field is set to 1/1/2021, and the 'Allow Posting To' field is set to 3/31/2021. The 'User ID' is KRISTEN, and the 'Time Sheet Ad...' checkbox is checked.

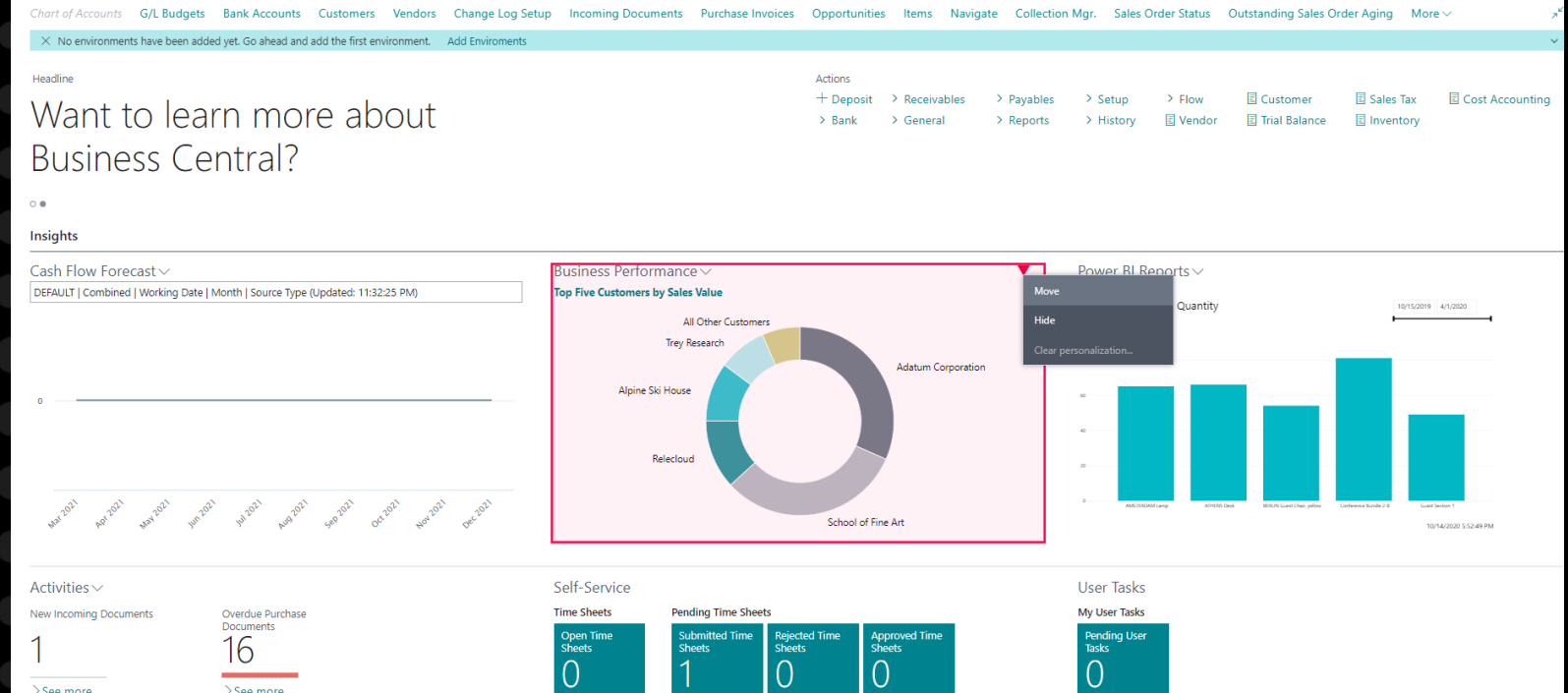
User ID ↑	Allow Posting From	Allow Posting To	Regi... Time	Salespers./Pu... Code	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Time Sheet Ad...	E-Mail
→ KRISTEN	1/1/2021	3/31/2021	<input type="checkbox"/>				<input checked="" type="checkbox"/>	

#8

Don't forget to shortcut and personalize

Use personalization by role or individual to:

- Move fields
- Add Fields
- Change column orders
- Hide dashboard items
- Sort Shortcuts



#9 Posting Groups

Don't limit posting groups to just one

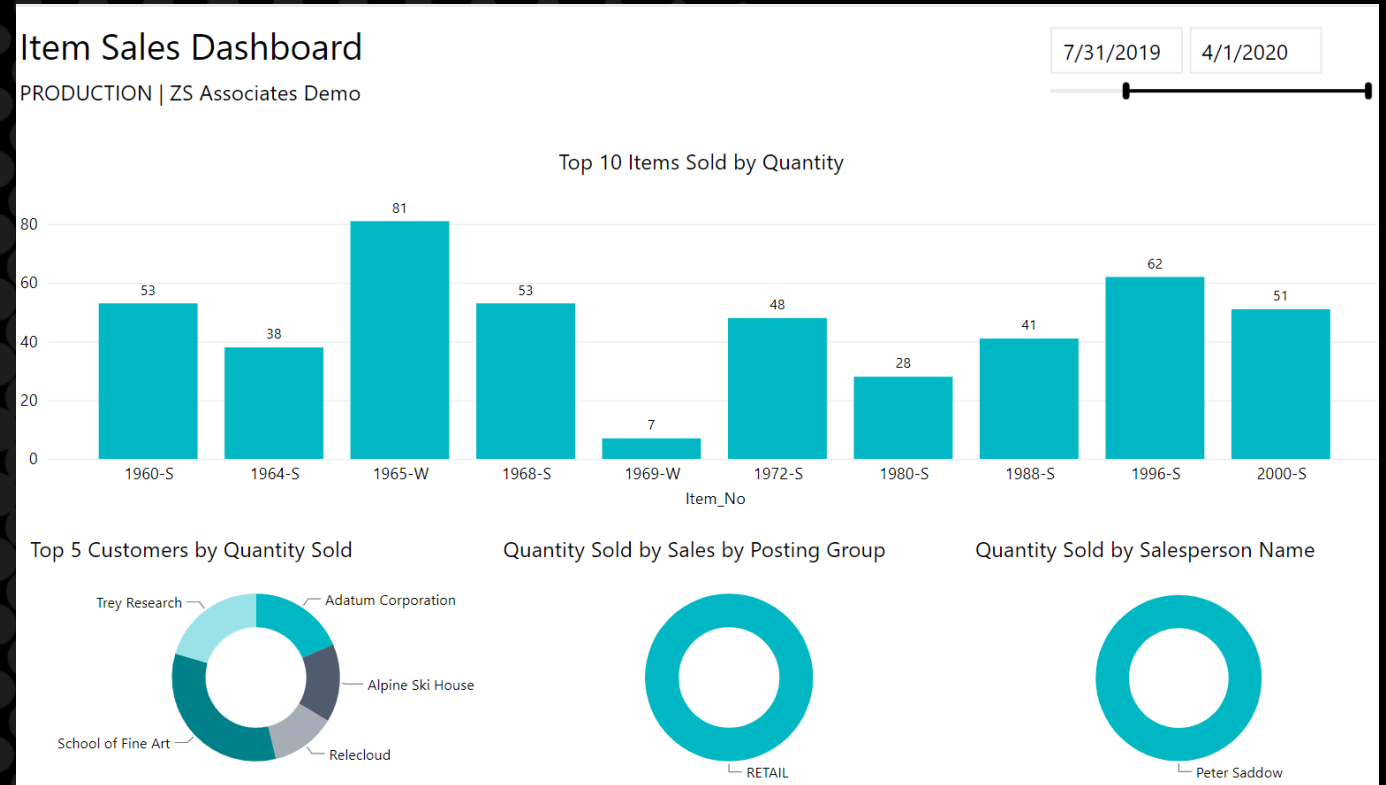
- Use posting groups to group customers, vendors, fixed assets, manufacturing items, etc.
- Report off of posting groups
- Use for combination of G/L account posting settings

- > FA Posting Groups
- > Job Posting Groups
- > Vendor Posting Groups
- > Customer Posting Groups
- > Employee Posting Groups
- > Inventory Posting Groups
- > VAT Product Posting Groups
- > VAT Business Posting Groups
- > Bank Account Posting Groups
- > Gen. Business Posting Groups
- > General Product Posting Groups
- > VAT Prod. Posting Group Conv.
- > Gen. Prod. Posting Group Conv.

#10

Don't just use out of the box reporting

- Enable powerful tools to make your reporting robust
 - Jet Reports
 - Power BI
 - Excel OData Reporting Connections
 - SQL reporting



#11 Outlook Adapter

Works directly inside outlook.
Provides insights into leads, contacts,
companies and vendors.

Create new:

- Customers
- Vendors
- Invoices (Sales and Purchasing)
- Purchase Orders
- Quotes
- Orders
- Send for Approval
- View Notes


our weekly Nashville Event and Nomination Guide


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Mon 3/1/2021 10:23 AM
To: Shannon Mullins

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 Nashville Business Journal Weekly Event Guide

 Commercial Real Estate Leadership Awards

Deadline Sunday, March 7

Deadline Extended - Nominate Now!

Nominate the most impactful leaders in Music City's commercial real estate industry. You have one more week!

[Submit a Nomination](#)

← C00030 · Nashville Business Journal

Details

0.00	0.00
Balance (\$)	Past Due
0.00	0.00
LTD Sales	YTD Sales

Aged Accounts Receivable ▾

Sell-to Customer Sales History

C00030
Customer No.

0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders
0	0

#12 Special Characters

Avoid using special characters within the No. (code) fields. Some reporting and inquiry tools don't like them.



Paul James

Fri 2/5/2021 3:24 PM

To: Kristen Hosman

I finally figured out why I can't get the Jet report to work for Mark. It's because of the FA SubClass: COMP&ACC. Jet Reports can't accept that **special character** in the name. Can that be change and all entries in the FA Ledger be changed to drop the & symbol?

Company

Fixed Asset Roll Forward

January 31, 2021

Class	Sub Class	Asset ID	Description	Asset				Accum. Depreciation		
				Beginning	Purchases	Disposals	Ending	Beginning	Depreciation	Disposals
TANGIBLE										

Jet Reports



The FilterField 'FA Subclass Code' has an empty Filter argument, which is not allowed. Use "" to filter for blank, or prefix the Filter argument with @@ if it is a cell reference.

[More information...](#)

OK

Copy to Clipboard

#13

Closing Income Statement

Close the year without checking account types (income/balance). Not verifying this will cause your beginning balances for balance sheet accounts to be incorrect.

Also remember to close to a dimension level.

Business Central

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Setup & Extensions

Intelligent Cloud Insights



Chart of Accounts:

All

Search

+ New

Delete

Edit List

Process

Report

Page

More options

No.	Name	Net Change	Balance	Income/Balance	Account Subcategory	Account Type	Totaling
10000	BALANCE SHEET	—	—	Balance Sheet	Assets	Heading	
10001	ASSETS	—	—	Balance Sheet	Assets	Begin-Total	
10100	Checking account	1,985.40	1,985.40	Income Statement	Cash	Posting	
10200	Saving account	—	—	Balance Sheet	Cash	Posting	
10300	Petty Cash	96,549.23	96,549.23	Balance Sheet	Cash	Posting	
10400	Accounts Receivable	72,893.84	72,893.84	Balance Sheet	Accounts Receivable	Posting	
10500	Prepaid Rent	—	—	Balance Sheet	Prepaid Expenses	Posting	
10600	Prepaid Insurance	—	—	Balance Sheet	Prepaid Expenses	Posting	

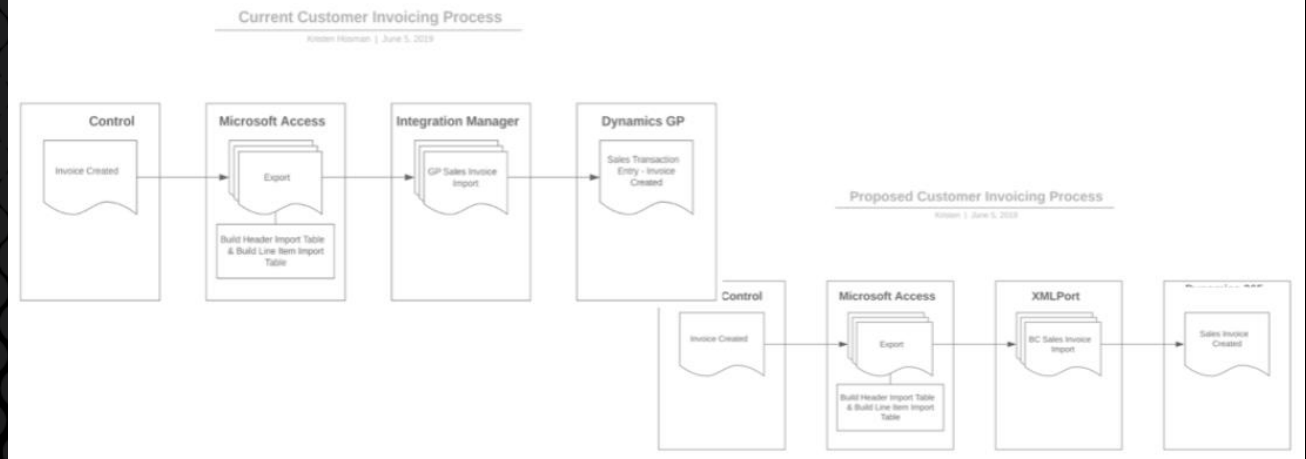
#14

New Processes

Never test a new process in your production environment, especially if it means turning on new functionality.

If you're going to test in the production environment, make sure it's a test company and not your production company.

Never Test a New Process In Your Production Company



#15 Configuration Package Card

Make sure you uncheck the Delete Table Records Before Processing.

Dynamics 365 Business Central

←

Config. Package Card

Process | Package | More options

General

Code VENDORS Language ID
Package Name Vendors Processing Order
Product Version Exclude Config. Tables ☐

Tables | Manage | More options

Table ID ↑	Table Name	Parent Table ID	Data Template	Dim... as Col...	Skip Table Trig...	Delete Table Records Before Processing	No. of Package Records	No. of Fields Available	No. of Fields Included
→ 23	Vendor	0		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	84	84

#16 Don't use the same number series for G/L batches

If you have multiple users, using different G/L batches, it is recommended to use different number series or there could be issues during posting.

No. Series ✓ Saved 🔍 🔗 🔗

✕ Reminder: your work date is 3/10/2021 Use today | Change to... | Turn off reminder

🔍 Search + New Edit List Delete Navigate Page Related Fewer options

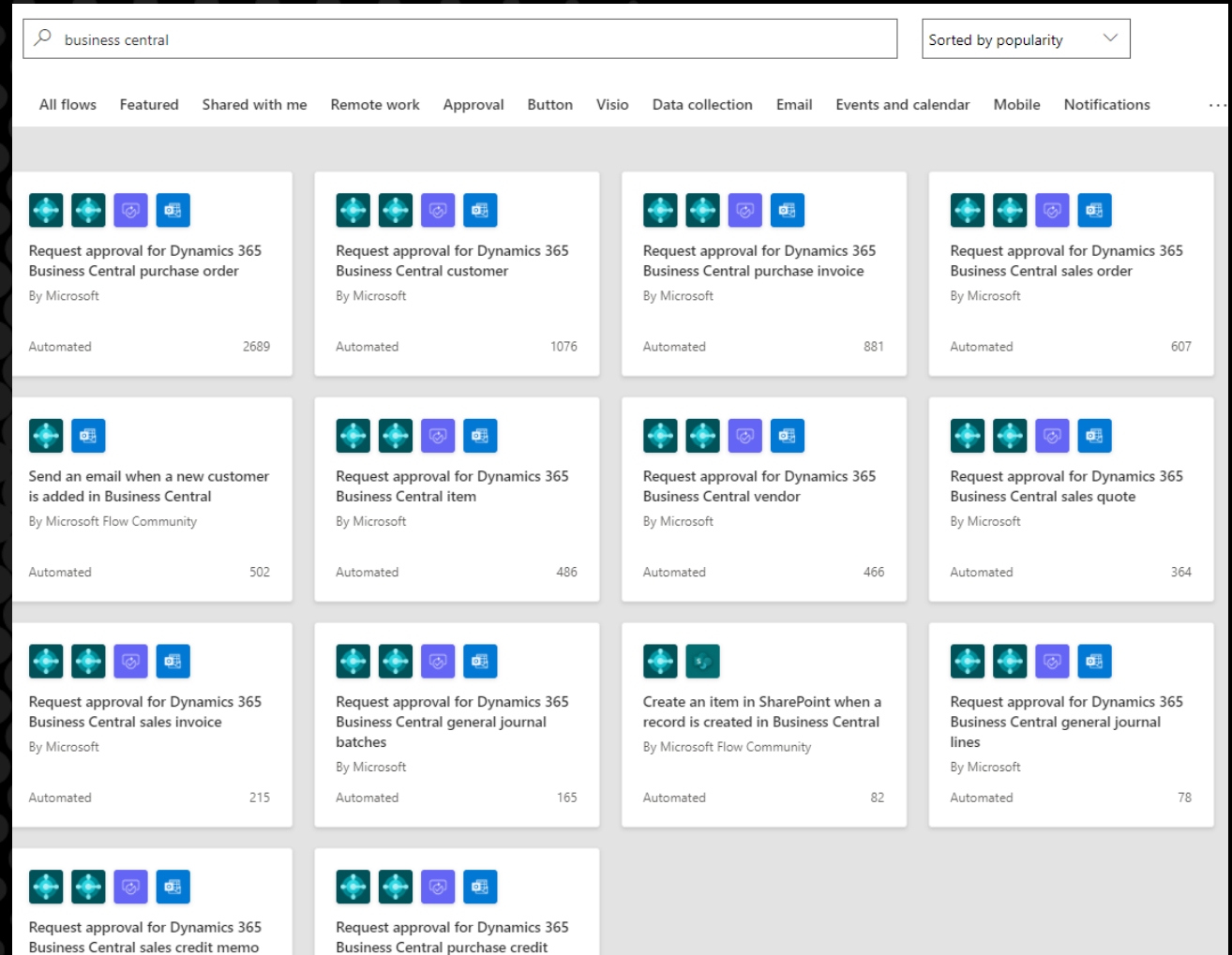
Code ↑	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Def... Nos.	Ma. Nos.
→ BANK	BANK	B010	B990	—	—	✓	
CAMP	Campaign	CP0001	CP9999	—	—	✓	
CASHFLOW	Cash Flow Forecast	CF000001	—	—	—	✓	
CONT	Contact	CT000001	CT100000	6/30/2020	CT000034	✓	
CONTRACT	Contracts	C0000001	C9999999	4/6/2020	C0000001	☐	
CT-MSG	Credit Transfer Msg. ID	1001	9999	—	—	✓	
CUST	Customer	C00010	C99990	6/30/2020	C00020	✓	
DEFF	Deferral Schedule	D000001	D999999	—	—	☐	
DEP	Deposits	DEP000001	DEP000000	—	—	☐	
D-INV	Draft Invoice	D-00001	D-99999	—	—	✓	
D-INV+	Posted Invoice	00001	99999	—	—	✓	
D-QUO	Estimate	E-00001	E-99999	—	—	✓	
EMP	Employee	E0010	E9990	—	—	✓	
FA	Fixed Asset	FA000010	FA999990	5/18/2020	FA000100	✓	
FA-INS	Insurance	INS000010	INS999990	—	INS000040	✓	
FA-INSJNLG	Insurance Journal	N00001	N01000	—	—	✓	
FA-JNL	Fixed Asset Journal	G05001	G06000	—	—	✓	
FAJNL-GL	Fixed Asset G/L Journal	F00001	F01000	—	—	✓	
FAJNL-GLR	Recurring Fixed Asset G/L Jnl	RF00001	RF01000	—	—	✓	
GJNL-GEN	General Journal	G00001	G01000	4/6/2020	G00002	✓	
GJNL-PMT	Payment Journal	G04001	G05000	—	—	✓	
GJNL-RCPT	Cash Receipts Journal	G02001	G03000	—	—	✓	

#17

Don't forget to use Power Automate

Power Automate comes standard and can be used with lots of functions, such as emails to a new customer, workflow approval, business process notifications, and even workflows.

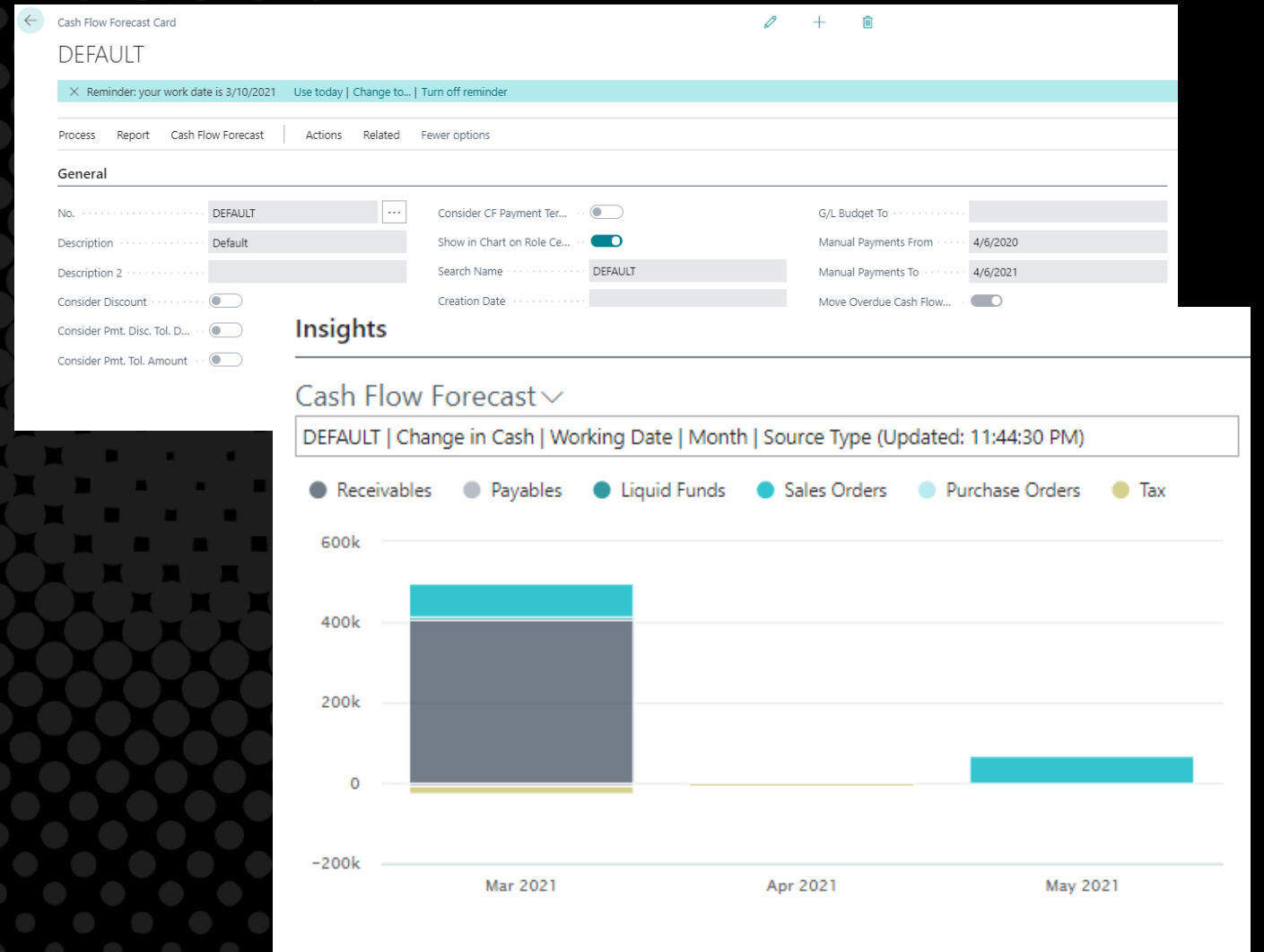
Check out some of the free templates here: <https://us.flow.microsoft.com/en-us/search/?q=business+central>



#18- Don't forget to use Budgets and Forecasts

You can have multiple budgets, by sales, items, customers, vendors, fixed assets, etc. for reporting purposes.

Business Central also has a robust cash flow forecast with smart forecasting.



#19- Don't forget to use APIs and ODATA

You can use OData inside Power BI, Excel, SQL Reports, integration connections, and more. It is your friend!

You can find the tables available under web services. If you can create extensions, you can always create your own API queries.

Web Services

X OData V3 (on the page referred as OData) is being deprecated on SaaS. Please use OData V4. Don't show me again | Show more

Search + New Edit List Delete Reload Open in Excel More options

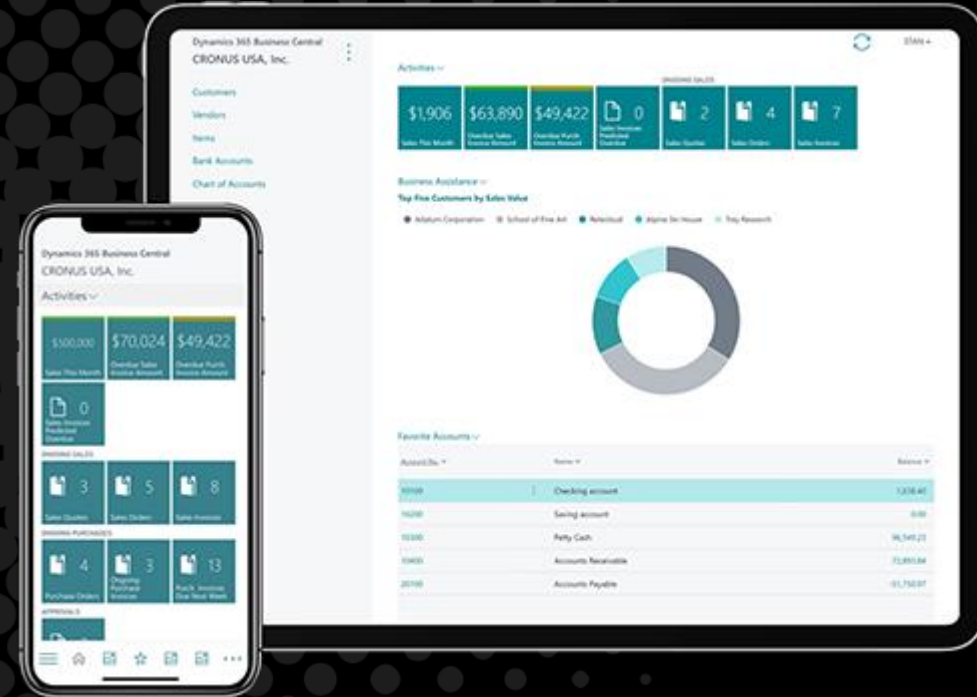
Views	Object Type †	Object ID	Object Name	Service Name †	All Tera...	Publi...	OData V4 URL	OData URL	SOAP URL
All	Query	261	G/L Entries	G/LEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
Filter list by...	Query	265	Item Ledger Entries	ItemLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	103	Item Sales and Profit	ItemSalesAndProfit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	102	Item Sales by Customer	ItemSalesByCustomer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	268	Job Ledger Entries	JobLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	61	Power BI Cust. Item Ledg. Ent.	Power BI Cust. Item Ledg. Ent.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	62	Power BI Cust. Ledger Entries	Power BI Cust. Ledger Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	50	Power BI Customer List	Power BI Customer List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	53	Power BI GL Amount List	Power BI GL Amount List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	58	Power BI GL Budgeted Amount	Power BI GL BudgetedAmount	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	52	Power BI Item Purchase List	Power BI Item Purchase List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	57	Power BI Item Sales List	Power BI Item Sales List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable
	Query	54	Power BI Jobs List	Power BI Jobs List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://api.businesscentral.dynamics...	https://api.businesscentral.dynamics...	Not applicable

#20- Don't forget to install the mobile app

Perfect for controllers, CFOs, salespeople, and more.

You can view or create BC data straight from your mobile device. Can do most functions except create payments.

<https://docs.microsoft.com/en-us/dynamics365/business-central/install-mobile-app#:~:text=Access%20your%20Business%20Central%20data,attach%20pictures%20with%20your%20camera>



Best Practices

- **Don't share usernames and passwords.**
- **Have a customization developed without requiring full source code and design documentation from the developer or partner.**
- **Use Microsoft Learn!**
- **Leverage your community, we're here to help!**



Thank You Community!