

Kl. 11:50 – 12:15

Tips og triks i Business Central

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45 (18) tips in
45 (20) minutes
Business Central

[Bokførte salgsfakturaer](#)



Tip # 1

#1: Use Background Posting to boost productivity

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the Dynamics 365 Business Central logo, the environment name 'Environment: US', and various utility icons. The main content area is titled 'General Ledger Setup' and features a navigation bar with options like 'Home', 'Posting', 'General', 'Tax', 'Bank', 'Journal Templates', 'Automate', and 'Fewer options'. Below this, the 'Dimensions' section is visible, showing 'Global Dimension 1 C...' set to 'DEPARTMENT' and 'Global Dimension 2 C...' set to 'CUSTOMERGROUP'. The 'Background Posting' section is highlighted with a blue border and contains the following settings:

- Post with Job Queue:
- Post & Print with Job Queue:
- Job Queue Category: JRNLPST
- Notify On Success:
- Report Output Type: PDF

Below the Background Posting section is the 'Reporting' section, which includes dropdown menus for 'Financial Report for B...' (M-BALANCE), 'Financial Report for R...' (M-RETAIND), 'Financial Report for I...' (M-INCOME), and 'Additional Reporting'.

#1: Use Background Posting to boost productivity

The screenshot displays the Dynamics 365 Business Central user interface. At the top, the header bar shows the application name "Dynamics 365 Business Central" and the environment "Environment: US". Below the header, the organization name "CRONUS USA, Inc." is visible, followed by a navigation menu with options like Finance, Cash Management, Sales, Purchasing, and Shopify. A secondary menu includes Customers, Vendors, Items, Bank Accounts, Chart of Accounts, General Ledger Setup, Sales & Receivables Setup, and More. The main content area features a "Report Inbox" section with a table listing reports. One report is highlighted with a blue border:

Description	Created Date-Time ↓	Output Type
PDF	5/24/2023 11:30 ...	PDF



Tip # 5

#5: Use a company badge to help identify the company

The screenshot shows a software interface with a dark blue header bar. On the left, the word "ntral" is partially visible. On the right, there is a navigation area containing a search icon, a bell icon, a gear icon, a question mark icon, and a user profile picture. A blue square highlights a circular badge with "NYC" inside, next to the text "Environment: USA". Below the header, there is a navigation menu with items: "Posted Documents", "Shopify", "All Reports", and a hamburger menu icon. Below this, there are links for "Sales Journals", "Cash Receipt Journals", "Transfer Orders", and "Job Queue Entries". A vertical scrollbar is on the right side. At the bottom, there is a section titled "Sales Orders Released Not Shipped" with a progress bar below it.

Environment: USA

NYC

Posted Documents Shopify All Reports

Sales Journals Cash Receipt Journals Transfer Orders Job Queue Entries

Actions

- + Sales Quote + Sales Return Order > Sales
- + Sales Invoice + Sales Credit Memo > Reports
- + Sales Order > Tasks > History

Sales Orders Released Not Shipped

#5: Use a company badge to help identify the company

The screenshot shows the Dynamics 365 Business Central interface for the 'Contoso Electronics' company. The main content area is titled 'Company Information' and contains several sections: 'Communication', 'Payments', 'Shipping', 'Tax', 'Company Badge', and 'User Experience'. The 'Company Badge' section is highlighted with a blue border and contains the following fields:

Field	Value
Company Badge	Custom
Company Badge Style	Orange
Company Badge Text	NYC

The left sidebar shows navigation options for 'Contoso Electronics', including 'Sales Orders', 'Items', 'Headline', 'Activities', and 'Intercompany'. The top navigation bar includes the 'Contoso Electronics' logo, 'Dynamics 365 Business Central', and the environment 'NYC USA'.

#5: Use a company badge to help identify the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Electronics Dynamics 365 Business Central" and "Environment: USA". A navigation menu includes "Sales", "Purchasing", "Inventory", "Posted Documents", and "Shopify". Below this, there are links for "Items", "Customers", "Item Journals", "Sales Journals", and "Cash Receipt Journals".

The main content area features a large heading "Largest posted invoice was for" and a list of actions: "+ Sales Quote", "+ Sales Invoice", "+ Sales Order", and "> Tasks".

At the bottom, a dashboard section titled "Sales Orders Released Not Shipped" contains five cards with the following data:

Sales Orders - Open	Completely Re... from Stock	Ready To Ship	Partially Shipped	Del
4	0	0	0	0

An "Available Companies" dropdown menu is open on the right side of the screen. It contains a search bar and a list of companies with their respective badges:

- USA
- Contoso Consolidation (CON SOL badge)
- Contoso** (NYC badge, selected with a checkmark)
- Denmark
- Contoso Denmark (CPH badge)
- Germany
- Contoso Germany (HAM badge)
- Preview
- Contoso (preview) (TST badge)



Tip # 9

#9: Allow for over-receiving items when receiving purchases

Microsoft Dynamics 365 Business Central

Environment: Production

Item Card: 1896-S · ATHENS Desk

Home | Request Approval | Item | Prices & Discounts | Actions | Related | Reports | Automate | Fewer options

Copy Item | Adjust Inventory | Create Stockkeeping Unit | Apply Template | Add to Shopify


Quantity on Hand	1,030	Net Weight	34.6
Qty. on Purch. Order	23	Gross Weight	39.79
Qty. on Sales Order	10	Unit Volume	1.2
Qty. on Job Order	0	Over-Receipt Code	OVERRCPT10
Qty. on Assembly Order	0		

Costs & Posting Show more

Cost Details	Posting Details
Costing Method: FIFO	Gen. Prod. Posting Group: RETAIL
Standard Cost: 780.70	Tax Group Code: FURNITURE
Unit Cost: 539.806	Inventory Posting Group: RESALE
Net Invoiced Qty.: 1,030	Default Deferral Template:
Cost is Adjusted: <input type="checkbox"/>	Foreign Trade
Purchase Prices & Disco...: Create New...	Tariff No.:

Details | Attachments (0)

Picture



Marketing Text

[Create with Copilot](#) [Edit](#)

Create draft based on this item's

#9: Allow for over-receiving items when receiving purchases

Microsoft Dynamics 365 Business Central

Environment: Production

Vendor Card

10000 · Fabrikam, Inc.

Home | Request Approval | New Document | Vendor | Prices & Discounts | Report | More options

Contact | Merge With... | Apply Template | Send Email | Pay Vendor

State: GA

ZIP Code: 31772

[Show on Map](#)

Contact

Primary Contact Code: ...

Contact: Krystal York

Invoicing >

Payments > CM

Receiving

Location Code: ...

Shipment Method Code: ...

Shipping Agent Code: ...

Lead Time Calculation: ...

Base Calendar Code: ...

Customized Calendar: No

Over-Receipt Code: OVERRCPT20

#9: Allow for over-receiving items when receiving purchases

Microsoft Dynamics 365 Business Central

CRONUS USA, Inc. Over-Receipt Codes

Purchase Orders: All

Search + New Edit List Delete

Code ↑	Description	Default	Over-Receipt Tolerance %	Approval Required
106001	Over receipt up to 10% of quantity	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>
106002	Over receipt up to 20% of quantity	<input type="checkbox"/>	20	<input type="checkbox"/>
→ 106003	Over receipt up to 20% of quantity	<input type="checkbox"/>	30	<input checked="" type="checkbox"/>

Amount Including Tax

0	5,792.79
0	2,230.45
0	11,584.10
0	3,880.45
0	885.80
0	1,000.00
0	2,000.00
0	1,040.00
0	9,543.18

#9: Allow for over-receiving items when receiving purchases

Microsoft Dynamics 365 Business Central

Environment: Production

Purchase Order 106011 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

General Show more

Vendor Name: Fabrikam, Inc. Vendor Invoice No. *

Contact: Krystal York Vendor Shipment No.

Document Date: 4/10/2023 Status: Released

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Qty. to Receive	Qty. to Invoice
→ Item	1896-S		ATHENS Desk		10	PCS	1,500.00	11	

Subtotal End Total (USD) 45,000.00 Total End Total (USD) 45,000.00

#9: Allow for over-receiving items when receiving purchases

Microsoft Dynamics 365 Business Central

Environment: Production

Purchase Order 106011 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

The page has an error. Refresh (F5) to undo the change, or correct the error.

General Show more

Vendor Name Fabrikam, Inc. Vendor Invoice No. 12345678

Contact Krystal York Vendor Shipment No.

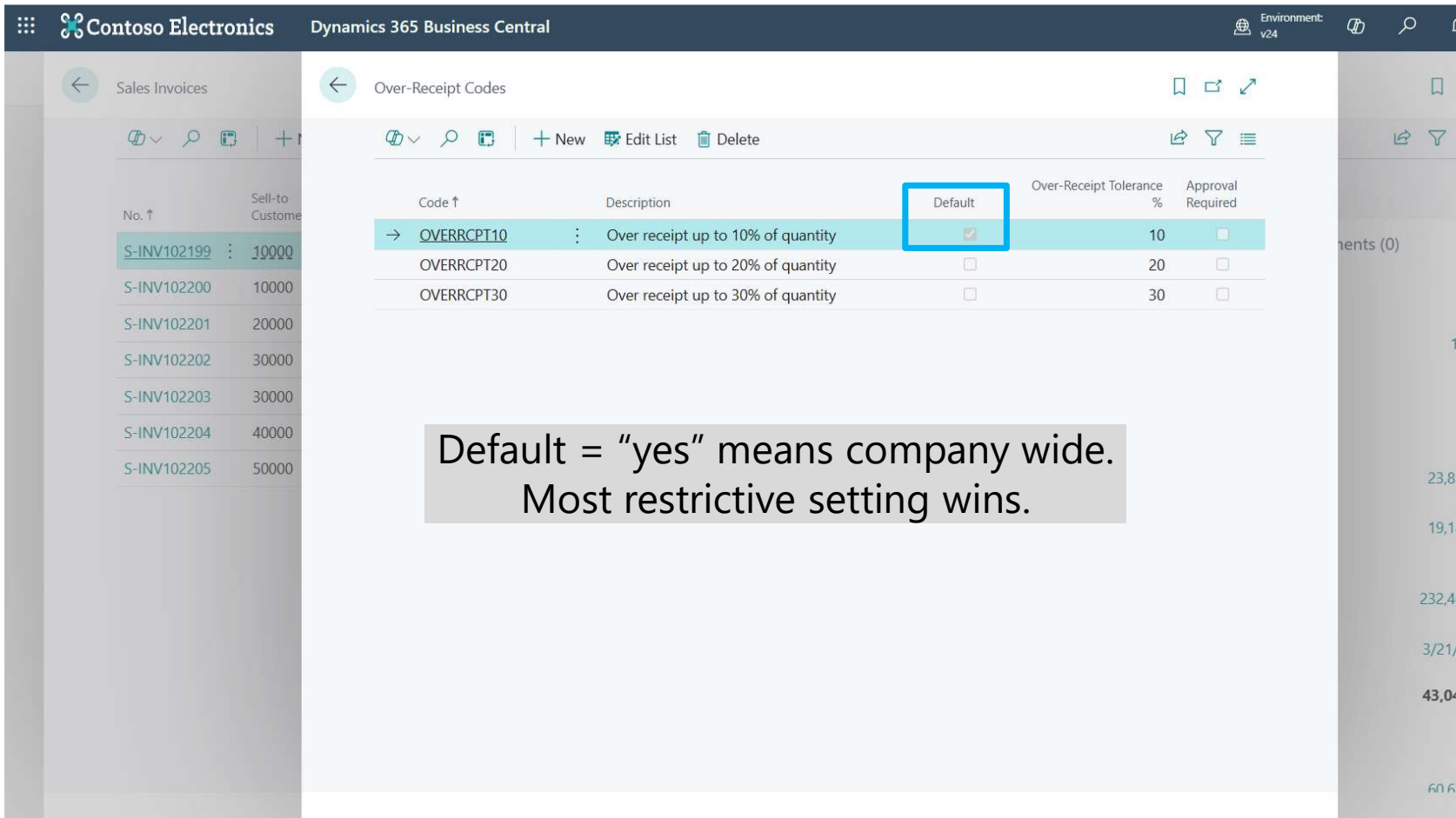
Document Date 4/10/2023 Status **Released**

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Qty. to Receive	Qty. to Invoice
Item	1896-S		ATHENS Desk		10	PCS	1,500.00	15	10
									Validation Results You cannot enter more than 1 in the Over-Receipt Quantity field.

#9: Allow for over-receiving items when receiving purchases



The screenshot shows the Dynamics 365 Business Central interface for Contoso Electronics. The main window displays the 'Over-Receipt Codes' table. The table has the following columns: Code, Description, Default, Over-Receipt Tolerance %, and Approval Required. The first row, 'OVERRCPT10', is selected and highlighted in light blue, with its 'Default' checkbox checked and circled in blue. The other two rows, 'OVERRCPT20' and 'OVERRCPT30', have their 'Default' checkboxes unchecked. A text box is overlaid on the bottom of the screenshot.

Code	Description	Default	Over-Receipt Tolerance %	Approval Required
→ OVERRCPT10	Over receipt up to 10% of quantity	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>
OVERRCPT20	Over receipt up to 20% of quantity	<input type="checkbox"/>	20	<input type="checkbox"/>
OVERRCPT30	Over receipt up to 30% of quantity	<input type="checkbox"/>	30	<input type="checkbox"/>

Default = "yes" means company wide.
Most restrictive setting wins.



Tip # 13

#13: Substitute posting groups on-the-fly

The screenshot shows the 'Sales & Receivables Setup' page in Dynamics 365 Business Central. The page is divided into two columns of settings. The 'Allow Multiple Posting Groups' toggle is highlighted with a blue box. The 'Check Multiple Posting Groups' dropdown is set to 'Alternative Groups'.

Customer Groups | **Payments** | **More options**

Setting	Value
Shipment on Invoice	On
Return Receipt on Credit Me...	Off
Invoice Rounding	On
Default Item Quantity	Off
Create Item from Item No.	Off
Create Item from Description	Off
Copy Customer Name to Entr...	On
Ext. Doc. No. Mandatory	Off
Appln. between Currencies	All
Logo Position on Documents	No Logo
Default Posting Date	Work Date
Default Quantity to Ship	Remainder
Auto Post Non-Invt. via Whse.	None
Copy Comments Blanket to O...	On
Calc. Inv. Discount	Off
Tax Bus. Posting Gr. (Price)	
Exact Cost Reversing Mandat...	Off
Check Prepm. when Posting	Off
Prepm. Auto Update Freque...	Never
Allow Document Deletion Bef...	
Allow Multiple Posting Groups	On
Check Multiple Posting Groups	Alternative Groups
Ignore Updated Addresses	Off
Skip Manual Reservation	Off
Quote Validity Calculation	
Copy Line Descr. to G/L Entry	Off
Document Default Line Type	Item
Disable Search by Name	Off

#13: Substitute posting groups on-the-fly

The screenshot shows the Dynamics 365 Business Central interface for 'Customer Posting Groups'. The header includes 'Contoso Electronics', 'Dynamics 365 Business Central', and 'Environment: USA'. The main area displays a table of posting groups. The 'DOMESTICRISK' group is selected, and its 'Receivables Account' value, '15115', is highlighted with a blue box. The 'Show All Accounts' toggle is turned on.

Code ↑	Description	View All Acc... on	Receivables Account	Service Charge Acc.	Payment Disc. Debit Acc.	Payment Disc. Credit Acc.
DOMESTIC	Domestic customers	<input type="checkbox"/>	15110		40910	40910
→ DOMESTICRISK	Domestic customers at risk	<input type="checkbox"/>	15115		40910	40910

#13: Substitute posting groups on-the-fly

The screenshot shows the Dynamics 365 Business Central interface for a Customer Card. The customer is identified as 40000 - Alpine Ski House. The interface is divided into several sections:

- Invoicing:** Contains fields for Customer, Tax Registration, GLN, Use GLN in Elect..., Copy Sell-to Ad..., Tax Liable, Tax Area Code (N.ATL., GA), Tax Identificatio..., Tax Exemption..., and Registration No.
- Posting Details:** Contains fields for Gen. Bus. Postin..., Customer Postin..., and a toggle for Allow Multiple P... which is currently checked.
- Prices and Discounts:** Contains fields for Currency Code, Customer Price..., Customer Disc..., Allow Line Disc. (checked), and Invoice Disc. Co... (40000).
- Customer Picture:** Displays a circular profile picture of a man.
- Sell-to Customer Sales History:** Shows the Customer No. as 40000 and a summary table:

Category	Count
Ongoing Sales Quotes	1
Ongoing Sales Blanket Orders	0
Ongoing Sales Orders	1

#13: Substitute posting groups on-the-fly

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main page is 'Customer Posting Groups', which is currently saved. The page includes a search bar, a toggle for 'Analyze', and a list of actions: '+ New', 'Edit List', 'Delete', 'Edit', 'View', and 'Related'. A 'Posting Group' dropdown menu is open, and the 'Alternative Groups' option is highlighted with a blue box. Below the menu, there is a 'Show All Accounts' toggle. The main table displays the following data:

Code ↑	Description	View All Acc... on	Receivables Account	Service Charge Acc.	Payment Disc. Debit Acc.	Payment Disc. Credit Acc.
→ DOMESTIC	Domestic customers	<input type="checkbox"/>	15110		40910	40910
DOMESTICRISK	Domestic customers at risk	<input type="checkbox"/>	15115		40910	40910

#13: Substitute posting groups on-the-fly

The screenshot displays the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main window is titled 'DOMESTIC' and shows the 'Alternative Customer Posting Groups' section. The interface includes a search bar, an 'Analyze' toggle, and buttons for '+ New', 'Edit List', and 'Delete'. A table below the header allows for selecting an 'Alternative Customer Posting Group'. The dropdown menu is currently set to 'DOMESTICRISK'. To the right, a summary table shows financial data:

Amount Shipped Not Invoiced (\$)	Amount S Not Invoi I
0.00	
0.00	
0.00	
0.00	
0.00	

#13: Substitute posting groups on-the-fly

Contoso Electronics Dynamics 365 Business Central

NYC Environment: USA

Sales Order S-ORD101012 · 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

Subtotal Excl. Tax (USD)	5,004.00	Total Excl. Tax (USD)	5,004.00
Inv. Discount Amount Excl. Ta...	0.00	Total Tax (USD)	350.28
Invoice Discount %	0	Total Incl. Tax (USD)	5,354.28

Invoice Details

	Code ↑	Description	Show less
Currency Code	DOMESTIC	Domestic customers	
Company Bank Account Code	→ DOMESTICRISK	Domestic customers at risk	No payment service is made available.
VAT Bus. Posting Group	+ New	Show details Select from full list	
Customer Posting Group	DOMESTIC	Department Code	SALES
Payment Terms Code	1M(8D)	Customergroup Code	SMALL
Payment Method Code		Payment Discount %	2
Tax Liable	<input checked="" type="checkbox"/>	Pmt. Discount Date	5/21/2024

javascript:

#13: Substitute posting groups on-the-fly

Contoso Electronics Dynamics 365 Business Central

NYC Environment: USA

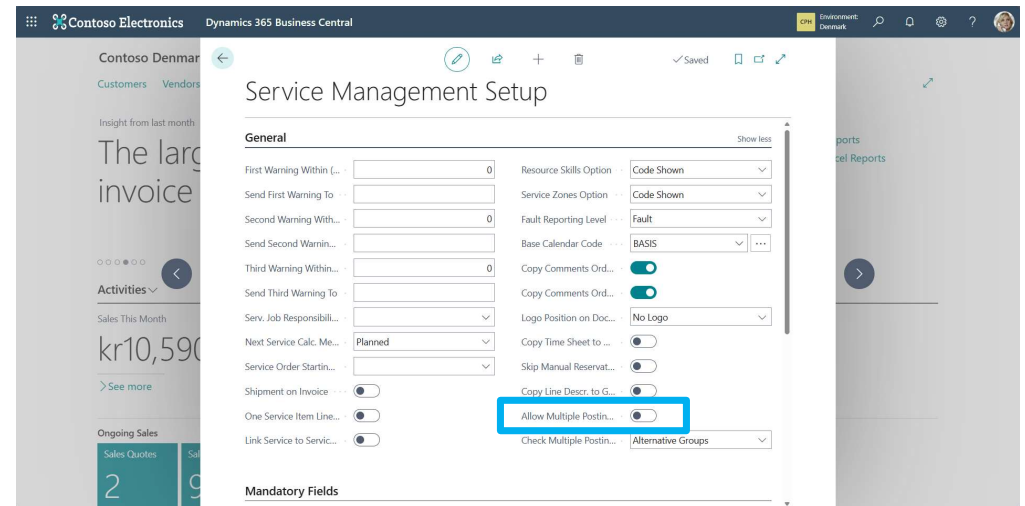
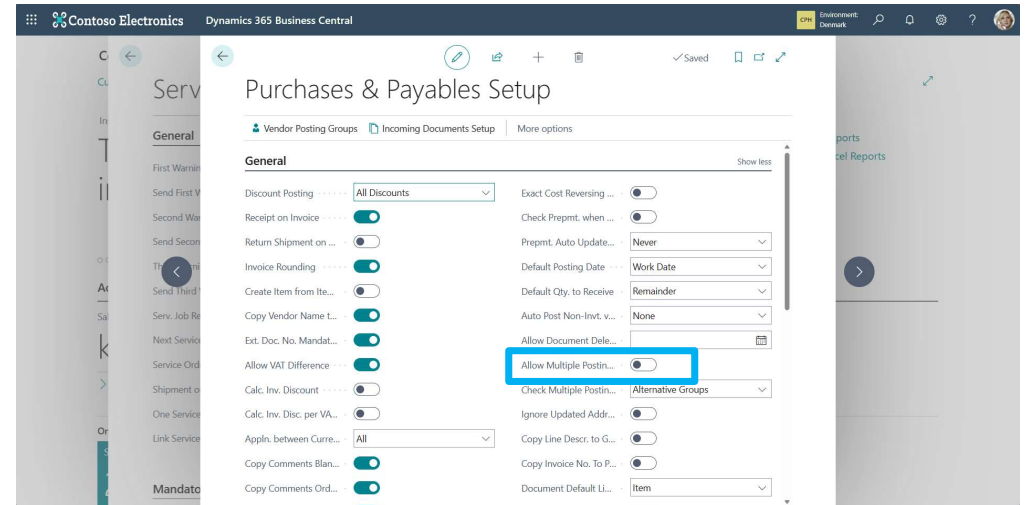
Contoso | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Chart of Accounts: All | Search | New | Delete | Edit List | Home | Account | Balance | Navigate

No.	Name	Net Change	Balance	Income/Ba...	Account Category	Account Subcategory
14250	WIP, Invoiced Sales	-	-	Balance Sh...	Assets	Inventory
14299	Total, Work in Progress	-	-	Balance Sh...	Assets	Inventory
15000	Receivables	-	-	Balance Sh...	Assets	Assets
15100	Accounts Receivables	-	-	Balance Sh...	Assets	Assets
15110	Account Receivable, Domestic	142,411.88	142,411.88	Balance Sh...	Assets	Assets
15115	Account Receivable, Domestic (At risk)	53,542.80	53,542.80	Balance Sh...	Assets	Assets
15120	Account Receivable, Foreign	-	-	Balance Sh...	Assets	Assets
15130	Contractual Receivables	-	-	Balance Sh...	Assets	Assets
15140	Consignment Receivables	-	-	Balance Sh...	Assets	Assets
15150	Credit cards and Vouchers Receivables	-	-	Balance Sh...	Assets	Assets
15199	Total, Account Receivables	195,954.68	195,954.68	Balance Sh...	Assets	Assets
15900	Other Current Receivables	-	-	Balance Sh...	Assets	Assets
15910	Current Receivable from Employees	-	-	Balance Sh...	Assets	Assets
15920	Accrued income not yet invoiced	-	-	Balance Sh...	Assets	Assets

#13: Substitute posting groups on-the-fly

Also possible in
Purchase and Service





Tip # 14

#14: Remainder Quantity on purchase orders

Contoso Electronics Dynamics 365 Business Central

Environment: NYC USA

Purchase Order 106008 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

Document Date: 1/5/2024 Status: Open

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Description	Unit of Measure Code	Quantity	Qty. to Receive	Quantity Received	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
Item	1896-S	ATHENS Desk	PCS	10	4	-	780.70		FURNITURE

Subtotal Excl. Tax (USD) 7,807.00 Total Excl. Tax (USD) 7,807.00

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

Invoice Discount % 0 Total Incl. Tax (USD) 7,807.00

Invoice Details > CM

Shipping and Payment > WHITE

#14: Remainder Quantity on purchase orders

The screenshot displays the Dynamics 365 Business Central interface for a Purchase Order. The header shows the company name 'Contoso Electronics' and the environment 'NYC Environment: USA'. The purchase order is for '106008 · Fabrikam, Inc.' and is currently 'Open'. The document date is '1/5/2024'. A dialog box is open over the 'Lines' section, offering three options: 'Receive' (selected), 'Invoice', and 'Receive and Invoice'. The background shows a table with one line item: 'Item 1896-S ATHENS Des' with a direct unit cost of 780.70. Summary fields at the bottom show a subtotal of 7,807.00 USD.

Type	No.	Description	Quantity Received	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
Item	1896-S	ATHENS Des	-	780.70		FURNITURE

Subtotal Excl. Tax (USD)	7,807.00	Total Excl. Tax (USD)	7,807.00
Inv. Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	7,807.00

#14: Remainder Quantity on purchase orders

Contoso Electronics Dynamics 365 Business Central

Environment: NYC USA

Purchase Order 106008 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

General Show more

Vendor Name: Fabrikam, Inc. Vendor Invoice No.: 12345
Contact: Krystal York
Document Date: 1/5/2024

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Description	Unit of Measure Code	Quantity	Qty. to Receive	Quantity Received	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code
→ Item	1896-S	ATHENS Desk	PCS	10	6	4	780.70		FURNITURE

Subtotal Excl. Tax (USD) 7,807.00 Total Excl. Tax (USD) 7,807.00
Inv. Discount Amount (USD) 0.00 Total Tax (USD) 0.00
Invoice Discount % 0 Total Incl. Tax (USD) 7,807.00

We don't necessarily want this auto filled with remaining quantity

#14: Remainder Quantity on purchase orders

The screenshot shows the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main window is titled 'Purchases & Payables Setup' and is focused on the 'Vendor Posting Groups' tab. The 'General' section is expanded, showing various configuration options. The 'Default Qty. to Receive' dropdown menu is highlighted with a blue box, and its options are visible: 'Blank' and 'Remainder'. The 'Remainder' option is currently selected. Other visible options include 'Discount Posting' (set to 'All Discounts'), 'Receipt on Invoice' (checked), 'Return Shipment on ...' (unchecked), 'Invoice Rounding' (checked), 'Create Item from Ite...' (unchecked), 'Copy Vendor Name t...' (checked), 'Ext. Doc. No. Mandat...' (checked), 'Allow Tax Difference' (checked), 'Calc. Inv. Discount' (unchecked), 'Calc. Inv. Disc. per Tax...' (unchecked), 'Appln. between Curre...' (set to 'All'), 'Copy Comments Blan...' (checked), 'Copy Comments Ord...' (checked), 'Copy Comments Ord...' (checked), 'Copy Cmts Ret.Ord. t...' (checked), 'Copy Cmts Ret.Ord. t...' (checked), 'Check Prepm. when ...' (unchecked), 'Prepm. Auto Update...' (set to 'Never'), 'Default Posting Date' (set to 'Work Date'), 'Combine Special Ord...' (set to 'Remainder'), 'Use Vendor's Tax Are...' (checked), 'Auto Post Non-Invt. v...' (set to 'None'), 'Allow Document Dele...' (empty), 'Allow Multiple Postin...' (checked), 'Check Multiple Postin...' (set to 'Alternative Groups'), 'Ignore Updated Addr...' (checked), 'Copy Line Descr. to G...' (checked), 'Copy Invoice No. To P...' (checked), 'Document Default Li...' (set to 'Item'), 'Disable Search by Na...' (checked), and 'Link Doc. Date to Pos...' (checked).



Tip # 15

#15: Get unblocked – Easily share error details

Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	
	8	STK	5,560.00		5,560.00	
<p>Status must be equal to 'Open' in Sales Header: Document Type=Invoice, No.= 102228. Current value is 'Released'.</p>						
.00	Total Excl. VAT (DKK)				5,560.00	
.00	Total VAT (DKK)				0.00	
0	Total Incl. VAT (DKK)				5,560.00	

Copy error details

Share details via Teams

Share details via email

#15: Get unblocked – Easily share error details

Microsoft Teams - Copilot for Finance - Microsoft Edge Beta

https://teams.microsoft.com/share?href=https%3A%2F%2Fbusinesscentral.dynamics.com%2F5...

Share to Microsoft Teams

Share to

Type the name of a person, group, or channel

Say something about this

(Use **Ctrl+V** to paste the error details from the clipboard here.)

Link to page:

https://businesscentral.dynamics.com/5e39e051-2efc-43b7-b612-932bd2473990/Denmark?company=CRONUS%20Danmark%20A%2FS&bookmark=1D_JAAAAACLAGAAAAJ7BjEAMAAyADIAMgA4&page=43

Share

Type	Quantity	Unit of Measure
Item	8	STK

Subtotal Excl. VAT (DKK)

Inv. Discount Amount E

excl. VAT (DKK)

AT (DKK)

#15: Get unblocked – Easily share error details

The screenshot shows a Microsoft Teams share dialog box overlaid on a web application. The dialog box is titled "Share to Microsoft Teams" and contains the following text:

Share to
Type the name of a person, group, or channel

Say something about this

Hey Mary
Can you help me with this error?

Here are the error details to help troubleshooting:

Error message:
Status must be equal to 'Open'

in Sales Header: Document Type=Invoice, No.=102228. Current value is 'Released'.

Internal session ID:
cf1f980f-78a3-4801-8bc5-fcb4a5c6c492

Application Insights session ID:
a113869h-f9a2-112e-8a8e-0be8393a5d57

Share

The background application shows a table with error details:

Type	Quantity	Unit of Measure
Item	8	STK

Subtotal Excl. VAT (DKK)
Inv. Discount Amount E



Tip # 17

#17: Fully automate Reminders / Dunning letters

The screenshot displays the Dynamics 365 Business Central interface for Contoso Electronics. The main window shows the 'My Settings - ADMIN' page for CRONUS USA, Inc. A modal dialog box titled 'Available Roles' is open, listing various roles. The 'Accounts Receivable Administrator' role is highlighted with a teal background and a right-pointing arrow. The dialog box includes a search bar, a list of roles, and 'OK' and 'Cancel' buttons at the bottom.

Available Roles

Display Name
Company Hub
Accountant
→ Accounts Receivable Administrator
Business Manager
Business Manager Evaluation
Service Manager
Sales Order Processor
Manufacturing Manager
Project Manager
Sales and Relationship Manager
Administration of users, security groups and permissions

OK Cancel

#17: Fully automate Reminders / Dunning letters

The screenshot displays the Dynamics 365 Business Central interface for Contoso Electronics. The top navigation bar includes the company name, environment version (v24), and various utility icons. The main content area is organized into several sections:

- Reminders:** A group of five cards showing reminder status: Draft Reminders (0), Issued, not paid reminders (0), Reminders not sent (0), **Configured automations (3)** (highlighted with a blue box), and Automation failures (0).
- User Tasks:** A card for My User Tasks showing 0 pending tasks.
- Self-Service:** A section for time sheets with cards for Current Time Sheet (Open Current Time Sheet), New Time Sheets (0), Time Sheets In progress (0), Submitted Time Sheets (0), Rejected Time Sheets (0), and Approved Time Sheets (0).
- Insights:** Two cards at the bottom: Customers with overdue balance and Overdue invoices.

#17: Fully automate Reminders / Dunning letters

Sending Reminders is a 3-step process

1 Create

2 Issue (Post)

3 Send

#17: Fully automate Reminders / Dunning letters

1 Create

2 Issue (Post)

3 Send

The screenshot shows the Dynamics 365 Business Central interface for 'Reminders Automation' in the 'Contoso Electronics' environment. The interface includes a left-hand navigation pane with sections for 'Reminders', 'Self-Service', and 'Insights'. The main area displays a table of automation jobs. Three blue callout boxes with numbers 1, 2, and 3 are positioned above the table, with arrows pointing to the first three rows of the table.

Code	Description	Status
CREATE REMINDERS	Create draft Reminders for all customers	On Hold
ISSUE REMINDERS	Issue DOMESTIC reminders	On Hold
SEND REMINDERS - DOMESTIC CUSTOMERS	Send Reminders for domestic customers	On Hold

#17: Fully automate Reminders / Dunning letters

1 Create

The screenshot shows the Dynamics 365 Business Central interface for creating a reminder automation. The page title is "CREATE REMINDERS" under the "Reminder Automation" section. The "General" section includes fields for Code (CREATE REMINDERS), Description (Create draft Reminders for all customers), Blocked (toggle), Reminder Terms Filter (DOMESTIC|FOREIGN), and Status (On Hold). The "Scheduling" section has a "Cadence" dropdown menu currently set to "Manual", with a list of options: Manual, Weekly, Monthly, and Custom schedule. A blue mouse cursor is pointing at the "Custom schedule" option. Below the scheduling section is an "Actions" bar with icons for New, Setup, Delete, and Manage. At the bottom, a table lists the automation steps:

Order ↑	Type	Code	Step summary	Stop on error
1	Create Reminder	DEFAULT	Default setup	<input type="checkbox"/>

#17: Fully automate Reminders / Dunning letters

Contoso Electronics Dynamics 365 Business Central Environment: v24

Reminder Automation

CREATE REMINDERS

Start Pause Refresh Log entries Reminders Actions Automate Fewer options

General

Code: CREATE REMINDERS
Description: Create draft Reminders for all customers
Blocked:
Reminder Terms Filter: DOMESTIC|FOREIGN
Status: On Hold

Scheduling

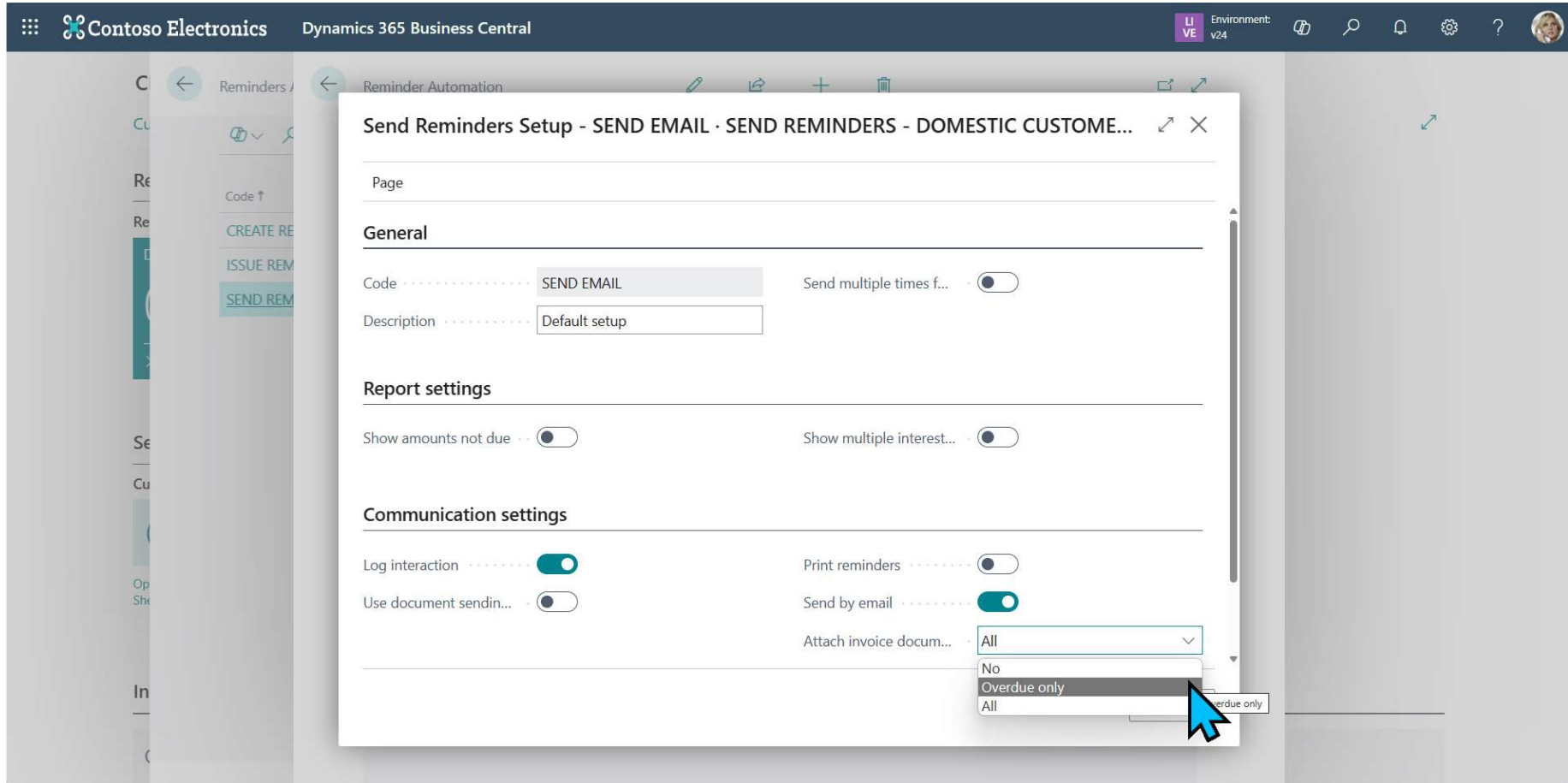
Cadence: Manual

Actions: New Setup Delete Move up Move down Set stop on error

Order ↑	Type	Code	Step summary	Stop on error
1	Create Reminder	DEFAULT	Default setup	<input type="checkbox"/>

#17: Fully automate Reminders / Dunning letters

3 Send



#17: Fully automate Reminders / Dunning letters

Tailor e-mail texts per Reminder Level

The screenshot displays the Dynamics 365 Business Central interface for 'Contoso Electronics'. The main view is 'Reminder Terms', showing a table with two entries: 'DOMESTIC' and 'FOREIGN'. The table columns include Code, Description, Maximum Number of Reminders, Post Interest, Post Additi... Fee, Post Additi... Fee per Line, and Minimum Amount (LCY). The 'DOMESTIC' row is highlighted in teal.

Code ↑	Description	Maximum Number of Reminders	Post Interest	Post Additi... Fee	Post Additi... Fee per Line	Minimum Amount (LCY)
<u>DOMESTIC</u>	Domestic Customers	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00
FOREIGN	Foreign Customers	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0.00

#17: Fully automate Reminders / Dunning letters

Tailor e-mail texts per Reminder Level

Environment: v24

Reminder Terms Setup

DOMESTIC · Domestic Customers

Customer Communication | More options

General Show more

Reminder Terms Code: DOMESTIC
Description: Domestic Customers
Maximum Number of ...: 0

Languages with custo... Attachments: ENU
Emails: ENU

Reminder Level | New Line | Delete Line | Reminder Level Fees | **Customer Communication** | ...

	No. ↑	Grace Period	Due Date Calculation	Calculate Interest	Add. Fee Calculation Type	Customer Communi...
→	1	2D	1M	<input type="checkbox"/>	Fixed	<input checked="" type="checkbox"/>
	2	2D	1M	<input type="checkbox"/>	Fixed	<input type="checkbox"/>
	3	2D	1M	<input type="checkbox"/>	Fixed	<input type="checkbox"/>

Languages with customer communications: Attachments: ENU
Emails: ENU

#17: Fully automate Reminders / Dunning letters

Tailor e-mail texts per Reminder Level

General Show more

Reminder Terms Code: DOMESTIC Languages with custo... Attachments: ENU Emails: ENU

Description: Domestic Customers

Maximum Number of ...: 0

Reminder Level | New Line | Delete Line | Reminder Level Fees | Customer Communication

No. ↑	Grace Period	Due Date Calculation	Calculate Interest	Add. Fee Calculation Type	Custor Comm
→ 1	2D	1M	<input type="checkbox"/>	Fixed	
2	2D	1M	<input type="checkbox"/>	Fixed	
3	2D	1M	<input type="checkbox"/>	Fixed	

Subject Oops! We're missing your payment

Greeting

Hey!

Body Text

We noticed you have outstanding payments, and this is a friendly reminder 🙄
We're all busy, and it probably just slipped through the cracks.
The payment was due on %1, and we've attached a copy of the invoice for your convenience.
Thank you!

Subject Is everything alright?

Greeting

Hi

Body Text

You haven't responded to our last reminder, which was due on %1, and we still haven't received payment 🙄
Could you please take the time to bring this in order with your accountant.
We appreciate it!
Thank you!

Subject Let's make you an offer you can't refuse

Greeting

Hello

Body Text

It seems you're not getting our reminders and don't have your books entirely in order.
We're sending over the collections family to help sort this out and restore the good nature of our relationship 🙄
It'll only take 5 minutes!
👉



Tip # 19

#19: Manage Copilot features

The screenshot shows the 'Copilot & AI capabilities' management page in Dynamics 365. The page is divided into two main sections: 'Production ready previews' and 'Generally available'. Both sections have a 'Deactivate' button and a link to 'Supplemental Terms of Use'.

Production ready previews

Capability ↑	Status	Publisher	Learn More
→ Chat	Active	Microsoft	Learn More
Analyze list	Active	Microsoft	Learn More
E-Document Matching Assistance	Active	Microsoft	Learn More
Bank Account Reconciliation	Active	Microsoft	Learn More
Sales Lines Suggestions	Active	Microsoft	Learn More

Generally available

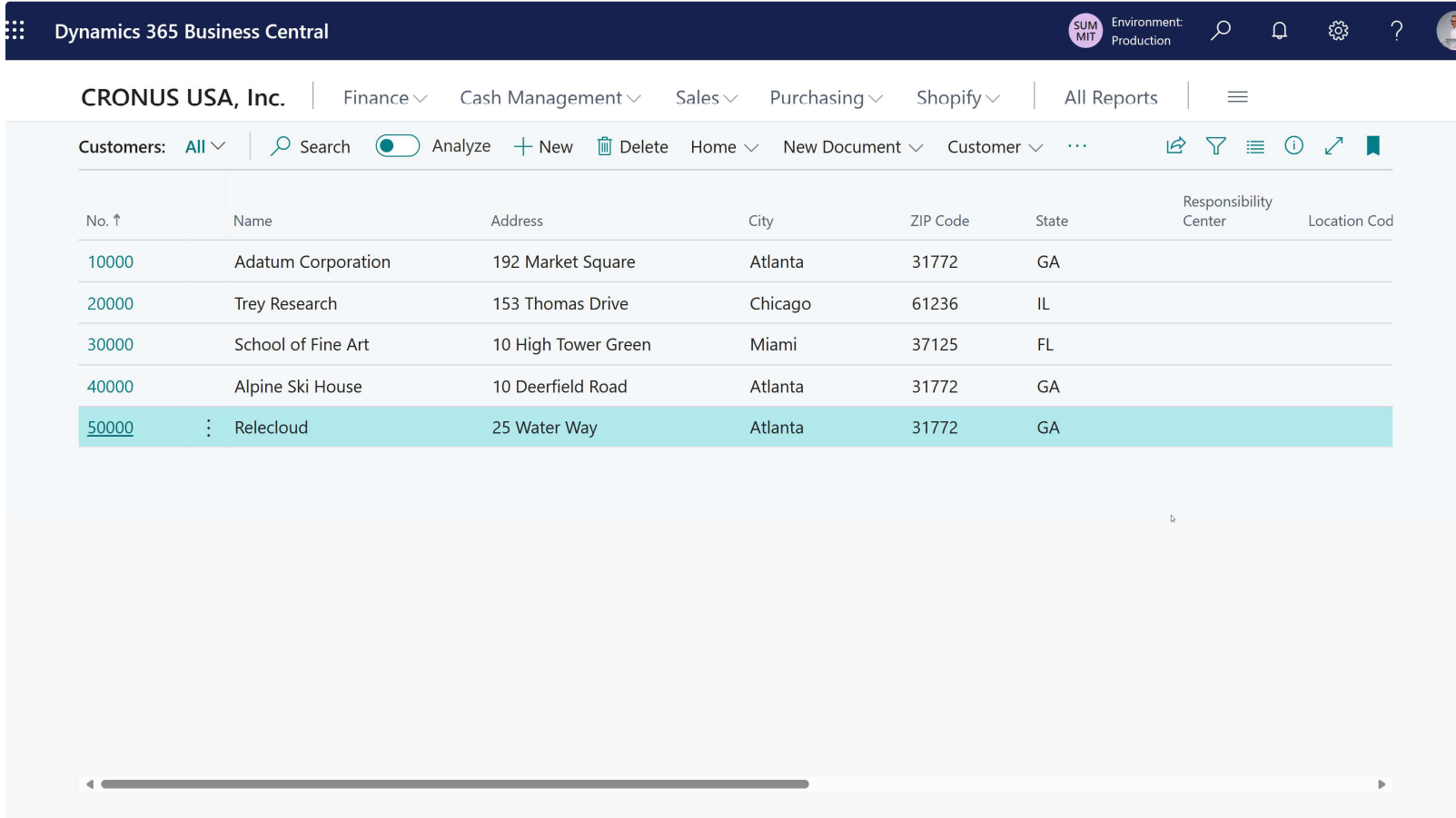
Capability ↑	Status	Publisher	Learn More
→ Marketing text suggestions	Active	Microsoft	Learn More

The left sidebar shows the user is logged in as 'CRONUS USA, Inc.' with a 'Finance' role. It includes navigation links for 'Customers', 'Vendors', 'Items', and 'Bank'. A 'Get started' section with a 'Show demo tours' button is visible. The 'Activities' section shows 'Sales This Month' with a value of '\$1,906'. The 'Ongoing Sales' section shows 'Sales Quotes' (2) and 'Sales Orders' (11).



Tip # 20

#20: Share report settings across the company



The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Dynamics 365 Business Central" on the left and "SUM MIT Environment: Production" on the right, along with search, notification, settings, and help icons. Below the header, the navigation bar includes "CRONUS USA, Inc." and several menu items: Finance, Cash Management, Sales, Purchasing, and Shopify. The main content area is titled "Customers: All" and features a search bar, an "Analyze" toggle, and action buttons for "New", "Delete", "Home", "New Document", and "Customer". A table of customer records is displayed below, with columns for "No.", "Name", "Address", "City", "ZIP Code", "State", "Responsibility Center", and "Location Cod". The row for "Relecloud" (No. 50000) is highlighted in light blue.

No. ↑	Name	Address	City	ZIP Code	State	Responsibility Center	Location Cod
10000	Adatum Corporation	192 Market Square	Atlanta	31772	GA		
20000	Trey Research	153 Thomas Drive	Chicago	61236	IL		
30000	School of Fine Art	10 High Tower Green	Miami	31725	FL		
40000	Alpine Ski House	10 Deerfield Road	Atlanta	31772	GA		
<u>50000</u>	⋮ Relecloud	25 Water Way	Atlanta	31772	GA		

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows "Dynamics 365 Business Central" on the left and "Environment: Production" on the right. Below the header, the navigation bar includes "CRONUS USA, Inc." and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. The main content area shows a list of customers. A context menu is open over the "Relecloud" customer (ID 50000), showing options: "Prices & Discounts", "Report", and "More options". The "Report" option is selected, opening a sub-menu with "Scheduled Statements", "Statement", and "Customer Order Summary".

No. ↑	Name	Address	City			
10000	Adatum Corporation	192 Market Square	Atlanta			
20000	Trey Research	153 Thomas Drive	Chicago			
30000	School of Fine Art	10 High Tower Green	Miami	37125	FL	
40000	Alpine Ski House	10 Deerfield Road	Atlanta	31772	GA	
50000	Relecloud	25 Water Way	Atlanta	31772	GA	

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface for the 'Customer - Order Summary' report. The background shows a list of customers with columns for 'No.' and 'Name'. The 'Customer - Order Summary' dialog box is open, showing the following configuration options:

- Printer:** (Handled by the browser)
- Report Layout:** ./Sales/Reports/CustomerOrderSummar... (with a menu icon)
- Use default values from:** Last used options and filters (with a dropdown arrow)
- Options:**
 - Show Amounts in \$
 - Starting Date
- Filter: Customer**
 - State: GA

At the bottom of the dialog are buttons for 'Send to...', 'Print', 'Preview', and 'Cancel'. A dropdown menu is open for the 'Use default values from' field, showing a list of options with 'Last used options and filters' selected. A 'Select from full list' button is highlighted in the dropdown menu.

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.' and various functional areas like 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. The current view is 'Customer - Order Summary'. A dialog box titled 'Select - Report Settings' is open, showing a table of report settings. The table has columns for Name, Report ID, Report Name, Assigned to, Created by, and a checkbox for 'Share with all users'. The selected report is 'Customer - Order Summary' with Report ID .107, assigned to ADMIN, and created by ADMIN. The 'Share with all users' checkbox is currently unchecked. Below the table are 'OK' and 'Cancel' buttons. In the background, a table of report settings is visible, with the 'Customer - Order Summary' report highlighted.

Name ↑	Report ID ↑	Report Name	Assigned to ↑	Created by	Share with all users	Corr
→ Last used options and filte...	.107	Customer - Order Summary	ADMIN	ADMIN	<input type="checkbox"/>	CRC

#20: Share report settings across the company

The screenshot shows the Dynamics 365 Business Central interface. The main window displays the 'Customer - Order Summary' report for 'CRONUS USA, Inc.'. A dialog box titled 'Select - Report Settings' is open, showing a table of report settings. The 'New' option in the context menu is highlighted, indicating the process of creating a new report setting to share across the company.

Table 1: Report Settings

Name ↑	Report ID ↑	Assigned to ↑	Created by	Sha... with all users	Corr
→ Last used options and filte...	.107	ADMIN	ADMIN	<input type="checkbox"/>	CRC

Table 2: Report Settings Context Menu

Action
Delete
New
Copy
Edit
Show as menu

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.', 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Shopify', and 'All Reports'. The current view is 'Customer - Order Summary' for 'CRONUS USA, Inc.'. A 'Select - Report Settings' dialog box is open, and within it, a 'Pick Report' dialog box is displayed. The 'Pick Report' dialog has the following fields and options:

- Name: Georgia customers
- Report Name: Customer - Order Summary
- Report ID: 107
- Company Name: CRONUS USA, Inc.
- Shared with All Users:

Buttons for 'OK' and 'Cancel' are visible at the bottom of the 'Pick Report' dialog. The background shows a table with columns for 'No.' and 'Name', and a 'Send to...' dialog box at the bottom.

#20: Share report settings across the company

The screenshot displays the Dynamics 365 Business Central interface. The main header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The navigation bar includes 'CRONUS USA, Inc.', 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Shopify', and 'All Reports'. A 'Customers: All' dropdown and a search bar are visible. The background shows a 'Select - Report' dialog with a list of report numbers (10000, 20000, 30000, 40000, 50000) and a search for 'Georgia custo'. The foreground features a 'Customer - Order Summary' dialog box with the following fields:

- Starting Date: 10/04/2023
- Filter: Customer
- State: GA
- No.: [Empty]
- Search Name: [Empty]
- Customer Posting Group: [Empty]
- Filter totals by: [Empty]
- Currency Filter: [Empty]

Buttons for 'OK' and 'Cancel' are located at the bottom of the dialog box.

#20: Share report settings across the company

Dynamics 365 Business Central

Environment: Production

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

Customers: All | Search

Customer - Order Summary

Select - Report Settings | Analyze | Edit List

Name ↑	Report ID ↑	Report Name	Assigned to ↑	Created by	Share with all users	Corr
→ Georgia customers	.107	Customer - Order Summary		ADMIN	<input checked="" type="checkbox"/>	CRC
Last used options and filte...	107	Customer - Order Summary	ADMIN	ADMIN	<input type="checkbox"/>	CRC

OK Cancel

Send to... Print Preview Cancel

#20: Share report settings across the company

Dynamics 365 Business Central Environment: Production

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

Customers: All | Search

No. ↑	Name
10000	Adatum Corporat
20000	Trey Research
30000	School of Fine Art
40000	Alpine Ski House
50000	Relecloud

Customer - Order Summary

Printer (Handled by the browser) ▾

Report Layout/Sales/Reports/CustomerOrderSummar... ⋮

Use default values from Last used options and filters ▾

Options

Show Amounts in \$ ▾

Starting Date ▾

Filter: Customer

× State GA

Send to... | Print | Preview | Cancel

Options List:

Name ↑
→ Georgia customers
Last used options and filters

Show details | Select from full list



Tip # 22

#22: Get insights into usage of BC – enable Application Insights

Contoso Electronics Dynamics 365 Business Central admin center

+ New Refresh Environment Transfers Recently deleted environments

Environments

Name	Application Family	Type	State	Country/region	Current Version	Available Update Version
USA	Business Central	Production	Active	US	23.5.16502.16589	
Denmark	Business Central	Sandbox	Active	DK	23.5.16502.16589	
Germany	Business Central	Sandbox	Active	DE	23.5.16502.16589	
v24	Business Central	Sandbox	Active	US	24.0.16410.17628	

Essentials

Service health

0 incidents or advisories.

#22: Get insights into usage of BC – enable Application Insights

Contoso Electronics Dynamics 365 Business Central admin center

Apps Sessions Database Support Update Settings Copy Restore Rename Delete Refresh

Environments

Notification Recipients

Microsoft Entra Apps

Telemetry

Reported Outages

Operations

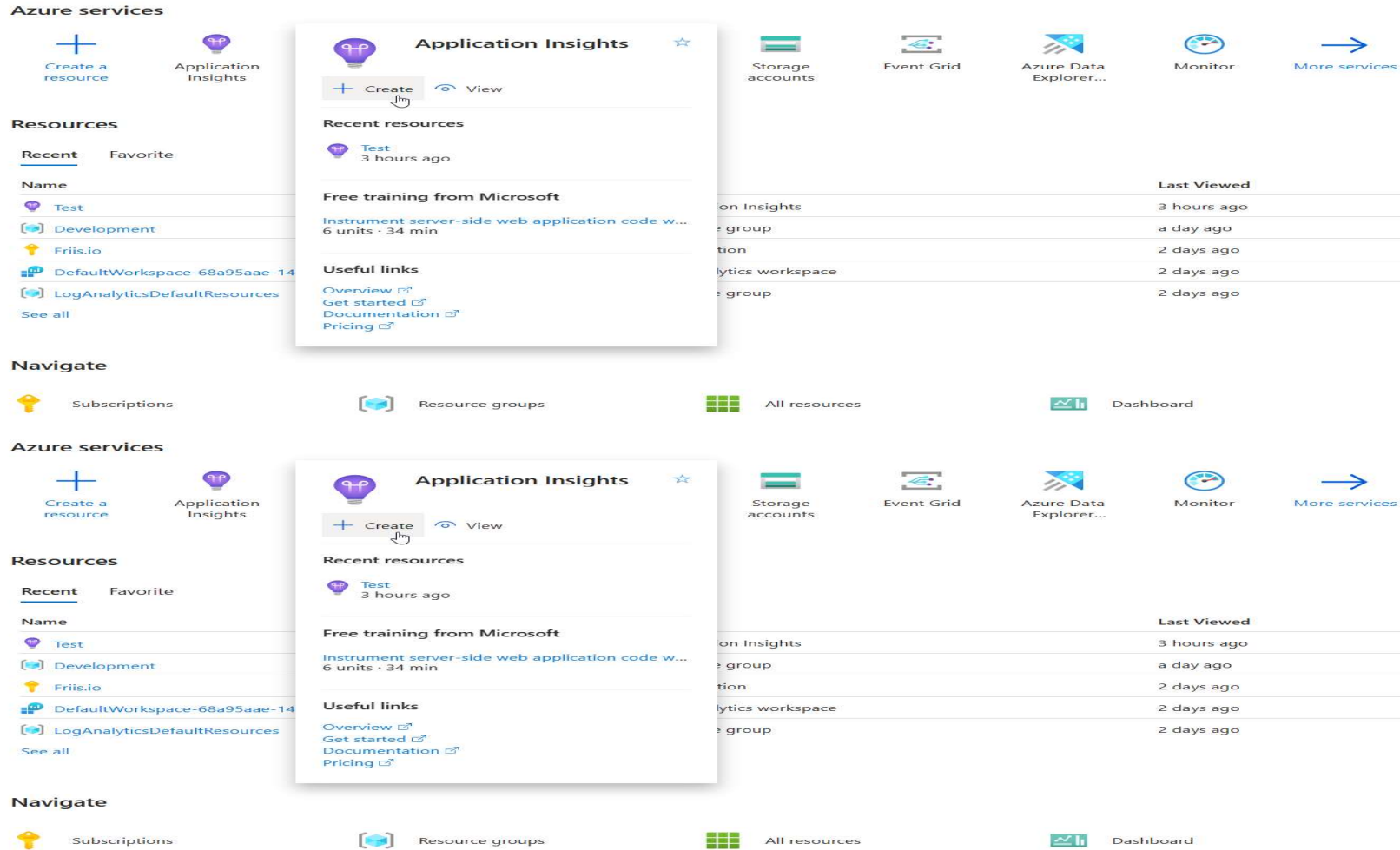
Capacity

Environments > USA

Details				Active ⓘ
Name	Application Family	Country/region	Azure Region	
USA	Business Central	US	East US	
Type	Telemetry (?) Not Set (Define)	Security Group	Access with Microsoft 365 Licenses (?)	
		Not Set (Define)	Off (Modify)	
URL https://businesscentral.dynamics.com/aae2ad71-f6d2-45bd-a4f3-00851793cdba/USA				

Version Management			
Application Version	Platform Version	Available Update Version	Update Scheduling Available (?)
23.5.16502.16589	23.0		

#22: Get insights into usage of BC – enable Application Insights



#22: Get insights into usage of BC – enable Application Insights

Home > **Test** Application Insights

Search

Application Dashboard Getting started Search Logs Monitor resource group Feedback Favorites Rename Delete

Essentials JSON View

Resource group (move) : [Development](#) Instrumentation Key : a8e19870-3fd2-40da-8801-a1aae7a2730d
Location : West Europe Connection String : InstrumentationKey=a8e19870-3fd2-40da-8801-a1aae7a2730d;Ingestio...
Subscription (move) : [Friis.io](#) Workspace : [DefaultWorkspace-68a95aae-1423-4517-ace2-9c2da6599c2b-WEU](#)
Subscription ID : 68a95aae-1423-4517-ace2-9c2da6599c2b
Tags (edit) : [Add tags](#)

Show data for last: 30 minutes 1 hour 6 hours 12 hours 1 day 3 days 7 days 30 days

Failed requests

Failed requests (Count)
test
0

Server response time

Server response time (Avg)
test
--

Server requests

Server requests (Count)
test
0

Failed requests

Failed requests (Count)
test
0

Server response time

Server response time (Avg)
test
--

Server requests

Server requests (Count)
test
0

Availability

Availability

#22: Get insights into usage of BC – enable Application Insights

The screenshot displays the Dynamics 365 Business Central admin center interface. The left sidebar shows navigation options: Environments, Notification Recipients, Microsoft Entra Apps, Telemetry, Reported Outages, Operations, and Capacity. The main content area is titled 'Environments > USA' and contains two sections: 'Details' and 'Version Management'.

Details

Name	Application Family	Country/region	
USA	Business Central	US	
Type	Telemetry (?)	Security Group	
Production	Not Set (Define)	Not Set (Define)	

URL
<https://businesscentral.dynamics.com/aae2ad71-f6d2-45bd-a4f3-00851793cdba/USA>

Version Management

Application Version	Platform Version	Available Update Version	
23.5.16502.16589	23.0		
Update will start on or after	Update Window (UTC-06:00) (?)	Update Rollout State (?)	
	09:00 PM - 04:00 AM (Modify)		

Logging telemetry

USA

Enter the connection string for the Azure Application Insights resource where you want telemetry to be stored for the environment. [Learn more](#)

Caution: Applying this connection string requires a restart to the environment. We recommend doing this when no users are active in Business Central.

Enable telemetry

Connection String *

InstrumentationKey=a8e19870-3fd2-40da-8801-a1aae7a2730d;Ing

Save Cancel

#22: Get insights into usage of BC – enable Application Insights

Usage ▾

Search

File ▾ | Export ▾ | Chat in Teams | Get insights | Subscribe to report

Dynamics 365 Business Central Usage

Usage

DAU / WAU / MAU

Sessions

Clients

Locations

Application Areas

Page views

Reports

Feature usage

Client actions

Integrations

Connectors

Checklist usage

Onboarding

Go back

Application areas (base application)

Tenant/Environment/Company: All

This page shows which parts of the Business Central base application the users use (or do not use).

Usage by Application areas

Area	Count
Sales	167
Finance	114
Purchasing	72
Inventory	45
Project Management	14
Warehouse Management	8
Manufacturing	4
Relationship Management	4
Assembly Management	2
Assembly	2
Human Resources	1
Payment	1
Service Management	1
Total	448

Page views and reports run

Area	Count
Sales	184
Finance	114
G/L	50
Payment	33
Currency	12
Dimensions	10
Item charges	6
Financial reporting	2
Fixed Assets	1
Intercompany	1
Tax	1
VAT	1
Workflow	1
Inventory	72
Purchasing	46
Planning	45
Project Management	14
Warehouse Management	8
Manufacturing	4
Relationship Management	4
Assembly Management	2
Assembly	2
Human Resources	1
Payment	1
Service Management	1
Total	448

Application area usage by Environments

Count	Area	Sub Area	Domain	AAD tenant Id	Environment Name
167	Sales				
45	Inventory				



Tip # 23

#23: Prevent negative inventory

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header includes the logo, 'Dynamics 365 Business Central', and the environment 'Environment: US'. The main content area is titled 'Inventory Setup' and has tabs for 'General', 'Posting', 'Journal Templates', 'Automate', and 'Fewer options'. The 'General' tab is active, showing various settings. The 'Prevent Negative Inventory' toggle is highlighted with a blue box and is currently turned on. Other settings include 'Automatic Cost Posting' (on), 'Expected Cost Posting' (off), 'Automatic Cost Adjustment' (Always), 'Default Costing Method' (FIFO), 'Average Cost Calculation Type' (Item & Location & Variant), 'Average Cost Period' (Day), 'Copy Comments on Order' (on), 'Outbound Warehouse Handling' (empty), 'Inbound Warehouse Handling' (empty), 'Variant Mandatory if...' (off), 'Skip Prompt to Create...' (off), and 'Copy Item Description to...' (off). The 'Location' section is partially visible at the bottom.

CRONU
Customer:
Vendors
Insight from
The
ATH
uni
Get s
Activities
Sales This M
\$12

Environment: US

Inventory Setup

General Posting Journal Templates Automate Fewer options

General Show less

Automatic Cost Posting

Expected Cost Postin...

Automatic Cost Adjus... Always

Default Costing Meth... FIFO

Average Cost Calc. Ty... Item & Location & Variant

Average Cost Period Day

Copy Comments Ord...

Copy Comments Ord...

Outbound Whse. Han...

Inbound Whse. Handl...

Prevent Negative Inv...

Variant Mandatory if ...

Skip Prompt to Creat...

Copy Item Descr. to E...

Location

Location Mandatory:

Example of blocking negative inventory at sales invoice posting

The screenshot shows the Dynamics 365 Business Central interface. At the top, the header reads "Dynamics 365 Business Central" and "Environment: US". Below the header, the "Error Messages" page is displayed. It features a search bar and an "Open Related Record" button. The main content is a table with the following columns: Message Type, Description, Context, Context Field Name, and Source. A single error message is listed, which is highlighted with a blue border. The message details are as follows:

Message Type	Description	Context	Context Field Name	Source
Error	You have insufficient quantity of Item 1896-S on inventory.	Sales Line: Invoice,S-INV102201,10...		-

At the bottom right of the interface, there is a "Show desktop" button.

Override on the individual items

Most permissive wins

Dynamics 365 Business Central

Environment: Production

Item Card

1900-S · PARIS Guest Chair, black

Home | Request Approval | Item | Prices & Discounts | Actions | Related | Reports | Automate | Fewer options

Copy Item | Adjust Inventory | Create Stockkeeping Unit | Apply Template | Add to Shopify

Inventory

Shelf No. [] Qty. on Asm. Component 0

Created From Catalog It... [] Stockout Warning Default (Yes)

Search Description PARIS GUEST CHAIR, BLACK Prevent Negative Invent... No

Quantity on Hand 0 Net Weight Default (Yes)

Qty. on Purch. Order 8 Gross Weight 9.55

Qty. on Sales Order 0 Unit Volume 0.25

Qty. on Job Order 0 Over-Receipt Code []

Qty. on Assembly Order 0

Costs & Posting

Cost Details

Costing Method FIFO

Standard Cost 150.30

Posting Details


Gen. Prod. Posting Group RETAIL

Tax Group Code FURNITURE

Details

Attachments (0)

Picture



Marketing Text

Create with Copilot Edit



Tip # 24

#24: Define checklists for users and roles

The screenshot displays the Dynamics 365 Business Central user interface. At the top, the header bar shows 'Dynamics 365 Business Central' on the left and 'Environment: US' with search, notification, settings, and help icons on the right. Below the header, the navigation bar includes 'My Company' and several menu items: Finance, Cash Management, Sales, Purchasing, and Shopify. A secondary navigation bar lists 'Customers', 'Vendors', 'Items', 'Bank Accounts', 'Chart of Accounts', 'General Ledger Setup', 'Sales & Receivables Setup', and 'More'. The main content area features a 'Get started' card with the text 'Here are a few steps that make you ready for business' and a 'Skip checklist' link. A 'Your checklist:' panel is open, showing a list of four items: '1. Sales Orders' (highlighted with a blue box), '2. Sales Invoices', '3. Sales Return Orders', and '4. Microsoft Learn'. To the right of the list, a detailed view for '1. Sales Orders' is shown, titled 'Manage orders, fulfillment, and invoicing'. It includes a description: 'Sales orders track what is ordered, what is shipped, and what is invoiced, all in a way that is connected to your inventory.', a duration of '15 minutes', and two buttons: 'Start' and 'Skip for now'. Below the checklist, an 'Activities' section is visible, containing four cards: 'Sales This Month', 'Overdue Sales Invoice Amount', 'Overdue Purch. Invoice Amount', and 'Sales Invoices Predicted Overdue', each with a refresh and refresh-and-clear icon.

Get started

Here are a few steps that make you ready for business

Skip checklist

Your checklist:

1. Sales Orders
2. Sales Invoices
3. Sales Return Orders
4. Microsoft Learn

Manage orders, fulfillment, and invoicing

Sales orders track what is ordered, what is shipped, and what is invoiced, all in a way that is connected to your inventory.

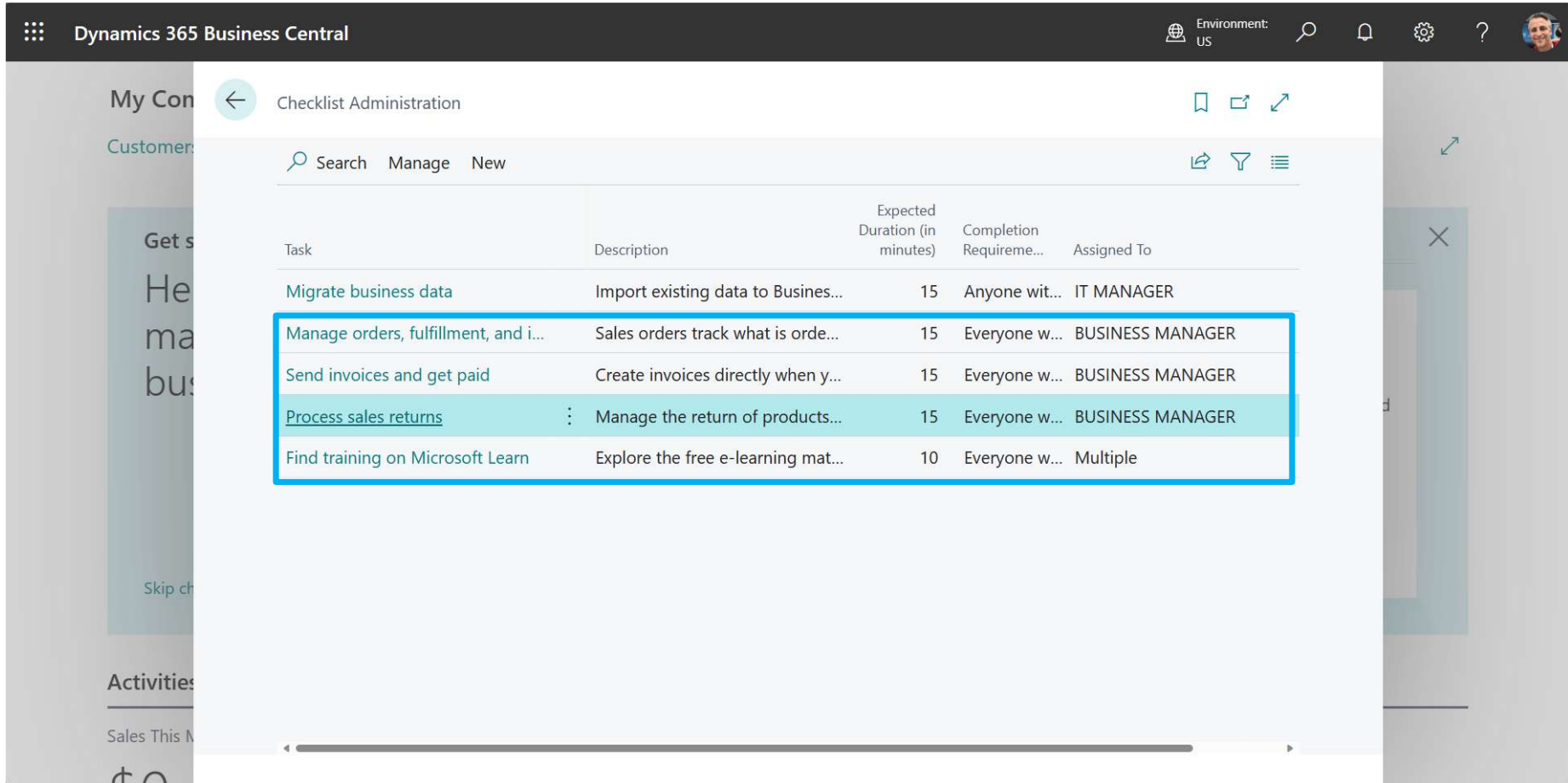
15 minutes

Start Skip for now

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
🔄 ↻	🔄 ↻	🔄 ↻	🔄

#24: Define checklists for users and roles



The screenshot shows the Dynamics 365 Business Central interface for Checklist Administration. The top navigation bar includes the Dynamics 365 logo, the text "Dynamics 365 Business Central", and the environment "Environment: US". The main content area is titled "Checklist Administration" and features a search bar with "Search", "Manage", and "New" options. Below the search bar is a table of checklists.

Task	Description	Expected Duration (in minutes)	Completion Requireme...	Assigned To
Migrate business data	Import existing data to Busines...	15	Anyone wit...	IT MANAGER
Manage orders, fulfillment, and i...	Sales orders track what is orde...	15	Everyone w...	BUSINESS MANAGER
Send invoices and get paid	Create invoices directly when y...	15	Everyone w...	BUSINESS MANAGER
<u>Process sales returns</u>	Manage the return of products...	15	Everyone w...	BUSINESS MANAGER
Find training on Microsoft Learn	Explore the free e-learning mat...	10	Everyone w...	Multiple



Tip # 29

#29: User browser tab groups for more efficiency

The screenshot shows a web browser with a tab group containing five tabs: 'Customers (LIVE)', 'Items (CPH)', 'Sales Orders (NYC)', 'Payment Journals (HAM)', and 'Extend general ledger posting...'. The browser address bar shows the URL: <https://businesscentral.dynamics.com/aae2ad71-f6d2-45bd-a4f3-00851793cdba/v24?company=CRONUS%20USA%2C%20Inc.&node=0000233e-438d-0000-0c28-4f00836bd2d2&page=22&dc=...>

The Dynamics 365 Business Central interface is displayed for 'CRONUS USA, Inc.' with the 'Sales' menu item highlighted. The main content area shows a list of customers with the following data:

Customer ID	Customer Name	Contact Name	Balance
10000	Adatum Corporation	Robert Townes	-1,060.85
20000	Trey Research	Helen Ray	3,036.60
30000	School of Fine Art	Meagan Bond	53,833.52
40000	Alpine Ski House	Ian Deberry	4,316.92
50000	Relecloud	Jesse Homer	8,836.80

The right-hand pane shows the 'Attachments (0)' section, which is currently empty. Below it, the 'Links' and 'Notes' sections are also empty, each displaying '(There is nothing to show in this view)'. The environment is identified as 'LIVE Environment: v24'.



Tip # 38

#38: Easily create an Excel layout for a report

amics 365 Business Central

SUM MIT Environment: Production

Inventory - Top 10 List
 Period:
 CRONUS USA, Inc.

05 October 2023
 Page 1
 ADMIN

Ranked according to largest Sales (LCY)

Rank	No.	Description	Sales (\$)	Inventory	Portion of Sales (LCY)
1	1936-S	BERLIN Guest Chair, yellow	486,028.00	77	*****
2	1896-S	ATHENS Desk	180,144.00	15	*****
3	1996-S	ATLANTA Whiteboard, base	167,676.00	10	*****
4	1920-S	ANTWERP Conference Table	53,880.60	6	*****
5	1906-S	ATHENS Mobile Pedestal	45,094.40	5	*****
6	1900-S	PARIS Guest Chair, black	23,136.00	0	**
7	1960-S	ROME Guest Chair, green	20,629.60	2	**
8	1972-S	MUNICH Swivel Chair, yellow	20,150.60	0	**
9	1968-S	MEXICO Swivel Chair, black	19,960.50	10	**
10	1965-W	Conference Bundle 2-8	18,937.80	-81	**
Total			1,035,637.50	44	
Total Sales			1124997.5	41	
% of Total Sales			92.10	107.3	

#38: Easily create an Excel layout for a report

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. A search bar is open with the text 'inventory top'. Below the search bar, a list of results is displayed under the heading 'Go to Reports and Analysis'. The first result is 'Inventory Top 10 List', which is highlighted. Below this, there are two search suggestions: 'Search company data' and 'Search Help'. At the bottom of the search results, there is a link: 'Didn't find what you were looking for? Try exploring pages or exploring reports'. The background shows a dashboard with various metrics and a 'Show demo tours' button.

Environment: Production

Search Results:

- Go to Reports and Analysis
 - Inventory Top 10 List
- Search for 'inventory top'
 - Search company data
 - Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$1 906	\$63 890	\$49 422	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for the company 'CRONUS USA, Inc.'. A report titled 'Inventory Top 10 List' is open, and its configuration dialog is shown. The dialog includes the following settings:

- Printer:** (Handled by the browser)
- Report Layout:** ./InventoryMgt/Reports/InventoryTop10... (with a menu icon)
- Use default values from:** Last used options and filters
- Options:**
 - Show:** Largest
 - Show:** Sales (\$)
 - Quantity:** 10
 - Include Items Not on Inventory ...:** (toggle switch is off)

At the bottom of the dialog, there are four buttons: 'Send to...', 'Print', 'Preview', and 'Cancel'. The 'Send to...' button is highlighted with a blue rectangular box, indicating the action to export the report to Excel.

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. The main area shows the 'Inventory Top 10 List' report. A dialog box titled 'Choose file type...' is open, allowing the user to select the output format. The options are:

- PDF Document
- XML Document
- Microsoft Word Document
- Microsoft Excel Document (data and layout)
- Microsoft Excel Document (data only)
- Schedule...

The 'Microsoft Excel Document (data only)' option is selected and highlighted with a blue box. The dialog box also features 'OK' and 'Cancel' buttons. In the background, the report shows a table with columns for 'Amount' and 'Overdue', with values like '\$1 906', '\$63 890', and '\$49 422' visible.

#38: Easily create an Excel layout for a report

The screenshot displays the Microsoft Excel interface with the 'Table Design' ribbon active. The spreadsheet shows a table with the following data:

leading	Integer_Number	Item_No	Item_Description	Item_Sales_LCY	Item_Inventory	BarText	Item_Sales_LCY	Control24	ItemSales
	1	1936-S	BERLIN Guest Chair, yellow	486,028.00	77	*****		486,028.00	0.00
	2	1896-S	ATHENS Desk	180,144.00	15	*****		180,144.00	0.00
	3	1996-S	ATLANTA Whiteboard, base	167,676.00	10	*****		167,676.00	0.00
	4	1920-S	ANTWERP Conference Table	53,880.60	6	****		53,880.60	0.00
	5	1906-S	ATHENS Mobile Pedestal	45,094.40	5	****		45,094.40	0.00
	6	1900-S	PARIS Guest Chair, black	23,136.00	0	**		23,136.00	0.00
	7	1960-S	ROME Guest Chair, green	20,629.60	2	**		20,629.60	0.00
	8	1972-S	MUNICH Swivel Chair, yellow	20,150.60	0	**		20,150.60	0.00
	9	1968-S	MEXICO Swivel Chair, black	19,960.50	10	**		19,960.50	0.00
	10	1965-W	Conference Bundle 2-8	18,937.80	-81	**		18,937.80	0.00

The bottom of the screen shows the 'Data' ribbon, 'Report Metadata', and 'Workbook Statistics' tabs. The status bar at the bottom indicates 'Calculation Mode: Automatic', 'Workbook Statistics', 'Give Feedback to Microsoft', and '130%' zoom.

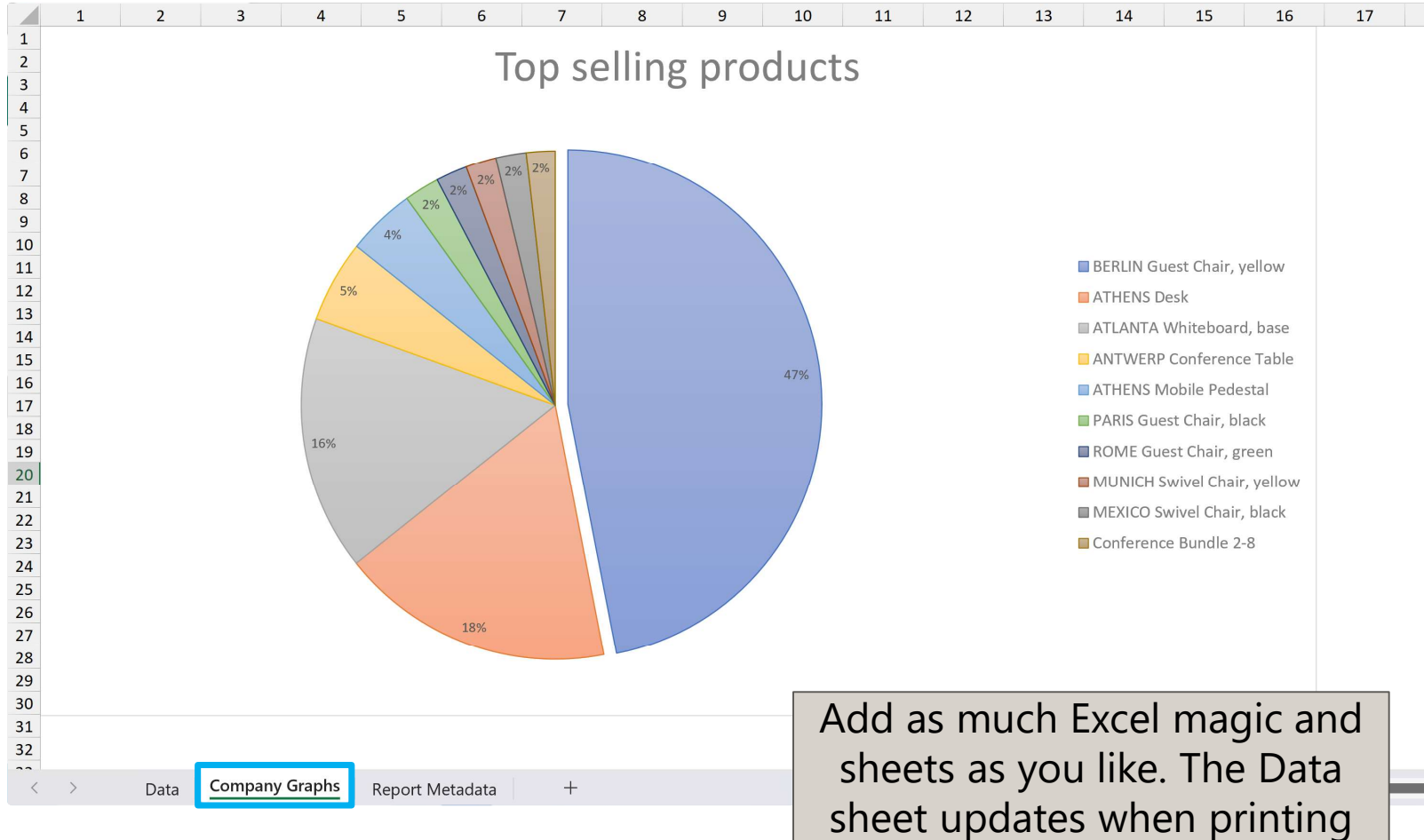
#38: Easily create an Excel layout for a report

The screenshot displays the Microsoft Excel interface with the 'Table Design' ribbon active. The data table is structured as follows:

Leading	Integer_Number	Item_No	Item_Description	Item_Sales_LCY	Item_Inventory	BarText	Item_Sales_LCY	Control24	ItemSales
1		1936-S	BERLIN Guest Chair, yellow	486,028.00	77	*****		486,028.00	0.00
2		1896-S	ATHENS Desk	180,144.00	15	*****		180,144.00	0.00
3		1996-S	ATLANTA Whiteboard, base	167,676.00	10	*****		167,676.00	0.00
4		1920-S	ANTWERP Conference Table	53,880.60	6	****		53,880.60	0.00
5		1906-S	ATHENS Mobile Pedestal	45,094.40	5	****		45,094.40	0.00
6		1900-S	PARIS Guest Chair, black	23,136.00	0	**		23,136.00	0.00
7		1960-S	ROME Guest Chair, green	20,629.60	2	**		20,629.60	0.00
8		1972-S	MUNICH Swivel Chair, yellow	20,150.60	0	**		20,150.60	0.00
9		1968-S	MEXICO Swivel Chair, black	19,960.50	10	**		19,960.50	0.00
10		1965-W	Conference Bundle 2-8	18,937.80	-81	**		18,937.80	0.00

At the bottom of the Excel window, the status bar shows: Calculation Mode: Automatic, Workbook Statistics, Average: 103563.75, Count: 20, Sum: 1035637.5, Give Feedback to Microsoft, and 130% zoom.

#38: Easily create an Excel layout for a report



#38: Easily create an Excel layout for a report

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. A search bar is open with the text 'inventory top'. Below the search bar, a list of results is displayed under the heading 'Go to Reports and Analysis'. The first result is 'Inventory Top 10 List', which is highlighted. Below this, there are two search suggestions: 'Search company data' and 'Search Help'. At the bottom of the search results, there is a link: 'Didn't find what you were looking for? Try exploring pages or exploring reports'.

Environment: Production

Search Results:

- Inventory Top 10 List

Search Suggestions:

- Search company data
- Search Help

Summary Cards:

Category	Value
Sales This Month	\$1 906
Overdue Sales Invoice Amount	\$63 890
Overdue Purch. Invoice Amount	\$49 422
Sales Invoices Predicted Overdue	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for the 'Inventory Top 10 List' report. The report configuration dialog is open, showing various settings. The 'Report Layout' field is highlighted with a blue box, indicating the option to create an Excel layout. The 'Options' section includes settings for 'Show' (Largest), 'Show' (Sales (\$)), 'Quantity' (10), and 'Include Items Not on Inventory' (disabled). The background shows the 'CRONUS USA, Inc.' dashboard with navigation tabs for Finance, Cash Management, Sales, Purchasing, and Shopify. A 'Get started' banner is visible on the left, and a table of sales data is partially visible at the bottom.

Inventory Top 10 List

Printer (Handled by the browser) ▾

Report Layout/InventoryMgt/Reports/InventoryTop10... **...**

Use default values from Last used options and filters ▾

Options

Show Largest ▾

Show Sales (\$) ▾

Quantity 10

Include Items Not on Inventory ...

Buttons: Send to... Print Preview Cancel

Background Text: Dynamics 365 Business Central, CRONUS USA, Inc., Finance, Cash Management, Sales, Purchasing, Shopify, All Reports, Environment: Production, SUM MIT, Get started, Hi, meet Business Central, You're all set to try out our Cronus. Go explore on your tour first, Show demo tours, Sales This Month, \$1 906, \$63 890, \$49 422, Overdue, features connect to other Microsoft services, es Predicted

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for 'CRONUS USA, Inc.'. The main window shows the 'Inventory Top 10 List' report. A 'Report Layouts' dialog box is open, listing the available layouts for this report. The dialog box has a search bar and a table with the following columns: Report ID, Report Name, Layout Name, Description, and Def... (Default). One layout is listed: Report ID 711, Report Name 'Inventory Top 10 List', Layout Name './InventoryMgt/Reports/Invent...', Description './InventoryMgt/Reports/Invent...', and it is marked as the default layout with a checkmark. The dialog box has 'OK' and 'Cancel' buttons at the bottom right. In the background, the report's data is partially visible, showing 'Sales This Month' as \$1,906 and other financial figures.

Report ID	Report Name	Layout Name	Description	Def...
711	Inventory Top 10 List	./InventoryMgt/Reports/Invent...	./InventoryMgt/Reports/Invent...	<input checked="" type="checkbox"/>

Activities

Sales This Month: \$1 906

Amount: \$63 890

Amount: \$49 422

Overdue: 0

Microsoft services

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.' and various functional areas like 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. The current report is titled 'Inventory Top 10 List'. A 'Report Layouts' dialog box is open, showing a table with columns for 'Report ID', 'Report Name', and 'Description'. The first row is selected, and a context menu is open over it, with the 'New' option highlighted. The dialog box also features 'OK' and 'Cancel' buttons. At the bottom of the screen, there are buttons for 'Send to...', 'Print', 'Preview', and 'Cancel', along with a summary section for 'Sales This Month' showing a value of '\$1 906'.

Report ID	Report Name	Description	Def...
711	Inventory	InventoryMgt/Reports/Invent... /InventoryMgt/Reports/Invent...	<input checked="" type="checkbox"/>

Activities

Sales This Month

\$1 906

Amount

\$63 890

Amount

\$49 422

Overdue

es Predicted

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.' and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. A report titled 'Inventory Top 10 List' is open, with a sub-tab for 'Items'. A dialog box titled 'Add New Layout for a Report' is overlaid on the report. The dialog box contains the following fields and options:

- Report ID: 711
- Report Name: Inventory Top 10 List
- Layout Name: Top products (Graphs) (highlighted with a blue box)
- Description: Use this report for board meetings
- Format Options: Excel
- Available in All Companies:

At the bottom of the dialog box are 'OK' and 'Cancel' buttons. Below the dialog box, a toolbar shows 'Send to...', 'Print', 'Preview', and 'Cancel' buttons. The background report shows a table with columns for 'Sales This Month' and 'Amount', with values like '\$1 906', '\$63 890', and '\$49 422'.

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. The main navigation bar includes 'CRONUS USA, Inc.', 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Shopify', and 'All Reports'. The current report is 'Inventory Top 10 List'. A 'Report Layouts' dialog box is open, showing a table with columns for 'Report ID' and 'Report Name'. A row is selected with '711' in the 'Report ID' column and 'Inventory Top 10 List' in the 'Report Name' column. A 'Choose Excel layout file' dialog box is overlaid on top, featuring a dashed blue box for file selection and a purple arrow pointing to a file icon labeled 'Inventory Top 10 List.xlsx'. The background report shows a table with columns for 'Sales This Month' and 'Amount', with values like '\$1,906' and '\$63,890'.

Report ID	Report Name
711	Inventory Top 10 List

Sales This Month	Amount
\$1,906	\$63,890
	\$49,422
	0

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. The main window shows the 'Inventory Top 10 List' report. A 'Report Layouts' dialog box is open, allowing the user to select a layout for the report. The dialog box contains a table with the following data:

Report ID	Report Name	Layout Name	Description	Default
711	Inventory Top 10 List	./InventoryMgt/Reports/Invent...	./InventoryMgt/Reports/Invent...	<input checked="" type="checkbox"/>
711	Inventory Top 10 List	Top products (Graphs)	Use this report for board meeti...	<input type="checkbox"/>

The dialog box also features search and filter icons at the top, a scroll bar at the bottom, and 'OK' and 'Cancel' buttons at the bottom right. The background shows the report's navigation pane with 'Customers', 'Vendors', and 'Items' tabs, and a summary section with 'Sales This Month' and 'Sales Predicted'.

#38: Easily create an Excel layout for a report

The screenshot shows the Dynamics 365 Business Central interface. The main window displays the 'Inventory Top 10 List' report. A 'Report Layouts' dialog box is open, showing a table of report layouts. The selected layout is 'Inventory' with Report ID 711. A context menu is open over the selected layout, showing options: Manage, New, Edit Info, Run Report, Set Default, Export Layout, Replace Layout, More options, and Show as menu. The 'Set Default' option is highlighted.

Report Layouts

Report ID	Report Name	Description	Default
711	Inventory	InventoryMgt/Reports/Invent...	<input checked="" type="checkbox"/>
711	Inventory	products (Graphs) Use this report for board meeti...	<input type="checkbox"/>

Context Menu:

- Manage
- New
- Edit Info
- Run Report
- Set Default**
- Export Layout
- Replace Layout
- More options
- Show as menu

Buttons: OK, Cancel

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface. The main window shows the 'Inventory Top 10 List' report. A 'Report Layouts' dialog box is open, showing a table of available layouts for this report. The table has columns for Report ID, Report Name, Layout Name, Description, and a checkbox for 'Def...'. The layout 'Top products (Graphs)' is selected, and its description is 'Use this report for board meeti...'. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

Report ID ↑	Report Name	Layout Name	Description	Def...
711	Inventory Top 10 List	./InventoryMgt/Reports/Invent...	./InventoryMgt/Reports/Invent...	<input type="checkbox"/>
→ 711	Inventory Top 10 List	Top products (Graphs)	Use this report for board meeti...	<input checked="" type="checkbox"/>

#38: Easily create an Excel layout for a report

The screenshot displays the Dynamics 365 Business Central interface for the company 'CRONUS USA, Inc.'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. The main area shows a 'Get started' section with a 'Show demo tours' button. A modal dialog titled 'Inventory Top 10 List' is open, allowing configuration of the report. The 'Report Layout' dropdown is highlighted with a blue box, showing 'Top products (Graphs)' selected. Other options include 'Printer' (Handled by the browser), 'Use default values from' (Last used options and filters), 'Options' (Show Largest, Show Sales (\$), Quantity 10, and Include Items Not on Inventory...), and buttons for 'Send to...', 'Download', and 'Cancel'.

Inventory Top 10 List

Printer (Handled by the browser) ▾

Report Layout **Top products (Graphs)** ...

Use default values from Last used options and filters ▾

Options

Show Largest ▾

Show Sales (\$) ▾

Quantity 10

Include Items Not on Inventory ...

Send to... Download Cancel

#38: Easily create an Excel layout for a report





Tip # 43

#43: Add any (table) field to the page

Amics 365 Business Central

Environment: Production

My Company | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer | Prices & Discounts | Report

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (\$)	Balance Due (\$)	Sales (\$)	Pa
C00070	Some Company 1					0.00	0.00	0.00	
C00080	Some Company 2					0.00	0.00	0.00	
C00090	Some Company 3					0.00	0.00	0.00	
C00100	Some Company 4					0.00	0.00	0.00	
C00110	Some Company 5					0.00	0.00	0.00	
C00120	Some Company 6					0.00	0.00	0.00	
C00130	Some Company 7					0.00	0.00	0.00	
C00140	Some Company 8					0.00	0.00	0.00	
C00150	Some Company 9					0.00	0.00	0.00	
C00160	Some Company 10					0.00	0.00	0.00	

#43: Add any (table) field to the page

The screenshot displays the Dynamics 365 Business Central interface. The main window shows the 'Profiles (Roles)' table. The table has the following columns: Profile ID, Display Name, Source, Role Center ID, and Use as default profile. The 'BUSINESS MANAGER' profile is highlighted. The table is filtered to show all profiles.

Profile ID	Display Name	Source	Role Center ID	Use as default profile
ACCOUNTANT	Accountant	Base Application	9027	<input checked="" type="checkbox"/>
ACCOUNTING MANAGER	Accounting Manager	Base Application	9001	<input type="checkbox"/>
AP COORDINATOR	Accounts Payable Coordinator	Base Application	9002	<input type="checkbox"/>
AR ADMINISTRATOR	Accounts Receivable Administrator	Base Application	9003	<input type="checkbox"/>
SECURITY ADMINISTRATOR	Administration of users, security	Base Application	9024	<input checked="" type="checkbox"/>
BLANK	Blank Profile	System Application	8999	<input type="checkbox"/>
BOOKKEEPER	Bookkeeper	Base Application	9004	<input type="checkbox"/>
BUSINESS MANAGER	Business Manager	Base Application	9022	<input checked="" type="checkbox"/>
BUSINESS MANAGER EVALUATION	Business Manager Evaluation	Base Application	9022	<input checked="" type="checkbox"/>
COMPANYHUB	Company Hub	Company Hub	1151	<input checked="" type="checkbox"/>
CREDIT MANAGER	Credit and Collections Manager	Base Application	36603	<input type="checkbox"/>
EMPLOYEE	Employee	Base Application	8999	<input type="checkbox"/>
FIN	Finance	Base Application	8901	<input checked="" type="checkbox"/>
HR	Human Resources	Base Application	8902	<input checked="" type="checkbox"/>

#43: Add any (table) field to the page

Dynamics 365 Business Central

Environment: Production

Profile (Role)

Profile (Role)

Customize pages Copy profile... Clear customized pages More options

General

Profile ID	BUSINESS MANAGER	Role Center ID	9022
Source	Base Application	Enabled	<input checked="" type="checkbox"/>
Display Name	Business Manager	Show in Role Explorer	<input type="checkbox"/>
Description	Functionality for managers in charge of keeping the business viable by determining product and		

Additional Settings

Use as default profile	<input type="checkbox"/>	Disable personalization	<input type="checkbox"/>
------------------------	--------------------------	-------------------------	--------------------------

Notes +

(There is nothing to show in this view)

#43: Add any (table) field to the page

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' and 'Environment: Production'. Below the header, the navigation bar includes 'Customers' and '+ Field'. The main content area shows a table of customers with columns for 'No.', 'Name', 'Responsibility Center', 'Location Code', 'Phone No.', 'Contact', 'Balance (\$)', and 'Balance Du'. The first row is highlighted in teal. On the right side, the 'Add Field to Page' sidebar is open, showing a list of fields to be added to the page. The 'All fields (Preview)' dropdown is selected, and the list includes 'Text Address', 'Text Address 2', 'Boolean Allow Line Disc.', 'Boolean Allow Multiple Posting Grou', 'Decimal Amount', 'Option Application Method', 'Decimal Balance', 'Decimal Balance Due', and 'Decimal Balance on Date'.

Environment: Production

Customers + Field

Clear customization... Done

My Company < Finance Cash Management Sales Purchasing Intelligent Cloud Insights Shopify >

Customers: All Search Analyze + New Delete Home New Document Customer ...

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (\$)	Balance Du
C00070	Some Company 1					0.00	
C00080	Some Company 2					0.00	
C00090	Some Company 3					0.00	
C00100	Some Company 4					0.00	
C00110	Some Company 5					0.00	
C00120	Some Company 6					0.00	
C00130	Some Company 7					0.00	
C00140	Some Company 8					0.00	
C00150	Some Company 9					0.00	
C00160	Some Company 10					0.00	

> Add Field to Page

Place fields by dragging from the position on the page.

All fields (Preview) ▾

- Text Address
- Text Address 2
- Boolean Allow Line Disc.
- Boolean Allow Multiple Posting Grou
- Decimal Amount
- Option Application Method
- Decimal Balance
- Decimal Balance Due
- Decimal Balance on Date

#43: Add any (table) field to the page

Amics 365 Business Central

Environment: Production

My Company | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer | Prices & Discounts | Report

No. ↑	Name	Address	City	ZIP Code	State	Responsibility Center	Location Code	Phone No.	Contact
C00070	Some Company 1	Some Street and Number 1	Montgomery	36101	Alabama				
C00080	Some Company 2	Some Street and Number 2	Charlotte	28201	North Carolina				
C00090	Some Company 3	Some Street and Number 3	Anchorage	99501	Alaska				
C00100	Some Company 4	Some Street and Number 4	Phoenix	85001	Arizona				
C00110	Some Company 5	Some Street and Number 5	Philadelphia	19019	Pennsylvania				
C00120	Some Company 6	Some Street and Number 6	Albuquerque	87101	New Mexico				
C00130	Some Company 7	Some Street and Number 7	Utica	39175	Mississippi				
C00140	Some Company 8	Some Street and Number 8	Deeth	89823	Nevada				
C00150	Some Company 9	Some Street and Number 9	Vallery Falls	97630	Oregon				
C00160	Some Company 10	Some Street and Number 10	Portage	04768	Maine				



Tip # 44

#44: Easily import master data

The screenshot displays the Microsoft Dynamics 365 Business Central interface. At the top, the header shows 'Dynamics 365 Business Central' on the left and 'Environment: Production' with search, notification, and settings icons on the right. Below the header, a navigation bar includes 'My Company' and several menu items: 'Finance', 'Cash Management', 'Sales', 'Purchasing', 'Shopify', and 'All Reports'. The main content area is titled 'Customers: All' and features a search bar, an 'Analyze' toggle, and buttons for '+ New', 'Delete', 'Home', 'New Document', 'Customer', 'Prices & Discounts', and 'Report'. A table with columns 'No.', 'Name', 'Responsibility Center', 'Location Code', 'Phone No.', 'Contact', 'Balz', 'Sales (\$)', and 'Pz' is shown. The table is currently empty, with the message '(There is nothing to show in this view)'. A context menu is open over the table, offering the following actions: 'Open in Excel', 'Edit in Excel', 'Share to Teams', and 'Copy link'.

#44: Easily import master data

The screenshot displays the Microsoft Excel interface with the following components:

- Title Bar:** "Customer Card" with a search bar containing "Search (Alt + Q)".
- Ribbon:** Includes "Table Design" and "Data" tabs. The "Table Design" ribbon shows options for Conditional Formatting, Format As Table, Cell Styles, Insert, Delete, and Format. The "Data" ribbon shows options for AutoSum, Clear, Sort & Filter, Find & Select, Add-ins, and Analyze Data.
- Table:** A table with the following columns: Name, CFDI Customer Name, Name 2, Search Name, IC Partner Code, Balance (\$), Balance Due (\$), Credit Limit (\$), Blocked, and Privacy Blocked. The table is currently empty.
- Microsoft Dynamics Panel:** Located on the right side, it includes a "Data Connector" section with a "New" button and a list of actions: Refresh, Publish, Filter, and Design.
- Bottom Bar:** Shows "Sheet1" and "Workbook Statistics".

#44: Easily import master data

The screenshot displays the Microsoft Dynamics CRM interface. The main area shows a table with the following data:

Company	Credit Limit (\$)	Address	Address 2	Country/Region Code	City	State	ZIP Code	Phone No.	Mobile Phone
Company 1	1000	Some Street and Number 1		US	Montgomery	Alabama	36101		
Company 2		Some Street and Number 2		US	Charlotte	North Carolina	28201		
Company 3	2000	Some Street and Number 3		US	Anchorage	Alaska	99501		
Company 4		Some Street and Number 4		US	Phoenix	Arizona	85001		
Company 5		Some Street and Number 5		US	Philadelphia	Pennsylvania	19019		
Company 6	1000	Some Street and Number 6		US	Albuquerque	New Mexico	87101		
Company 7		Some Street and Number 7		US	Utica	Mississippi	39175		
Company 8		Some Street and Number 8		US	Deeth	Nevada	89823		
Company 9	5000	Some Street and Number 9		US	Vallery Falls	Oregon	97630		
Company 10		Some Street and Number 10		US	Portage	Maine	04768		

The right-hand pane shows the 'Microsoft Dynamics' interface with the 'Data Connector' section. The 'Source' is 'Customer_Card_Excel' and the 'Field' is 'ZIP Code'. The 'Publish' button is highlighted with a red box.

#44: Easily import master data

Microsoft Dynamics 365 Business Central

Environment: Production

My Company | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customers: All | Search | Analyze | + New | Delete | Home | New Document | Customer | Prices & Discounts | Report

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (\$)	Balance Due (\$)	Sales (\$)	Pa
C00070	Some Company 1					0.00	0.00	0.00	
C00080	Some Company 2					0.00	0.00	0.00	
C00090	Some Company 3					0.00	0.00	0.00	
C00100	Some Company 4					0.00	0.00	0.00	
C00110	Some Company 5					0.00	0.00	0.00	
C00120	Some Company 6					0.00	0.00	0.00	
C00130	Some Company 7					0.00	0.00	0.00	
C00140	Some Company 8					0.00	0.00	0.00	
C00150	Some Company 9					0.00	0.00	0.00	
C00160	Some Company 10					0.00	0.00	0.00	

Templates are not used when importing this way!



Tip # 45

#45: Easily jump to entity with CTRL+ALT+DOWN

The screenshot displays the Dynamics 365 Business Central interface for an Item Card. The top navigation bar includes the Dynamics 365 logo, the text 'Dynamics 365 Business Central', and the environment 'Prod'. The main header shows 'Item Card' and the item name '1000 · Espresso Master'. Below the header is a navigation menu with 'Home', 'Request Approval', 'Item', 'Prices & Discounts', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. A secondary menu contains 'Copy Item', 'Adjust Inventory', 'Create Stockkeeping Unit', and 'Apply Template'. The main content area is divided into two sections: 'Item' and 'Inventory'. The 'Item' section includes fields for 'No.' (1000), 'Description' (Espresso Master), 'Blocked' (toggle), 'Type' (Inventory), 'Base Unit of Me...' (PCS), 'Item Category C...' (EM), and 'Variant Mandat...' (Default (No)). The 'Inventory' section includes fields for 'Shelf No.', 'Quantity on Hand' (-12), 'Qty. on Purch. O...' (0), 'Qty. on Sales Or...' (1), 'Stockout Warning' (Default (Yes)), 'Unit Volume' (0), and 'Over-Receipt Co...'. On the right side, there are tabs for 'Details' and 'Attachments (0)', a 'Picture' section with a cube icon, and a 'Marketing Text' section with 'Create with Copilot' and 'Edit' buttons. The interface also features a left sidebar with a back arrow and a right sidebar with a forward arrow.



Tip # 46

#46: Mine innstillinger - Endre når jeg mottar varslinger

CRONUS NO | Salg og kjøp ▾ | Prosjekter ▾ | Ressurser ▾ | Kladder ▾ | Bokførte bilag ▾ | Alle rapporter | ☰

Prosjekter | Åpne | Planlagt og gitt tilbud | Fullført

✕ Dette er et sandkassemiljø bare for testing, demonstrasjon

Overskrift

God kveld,
user_9afd2bd6f1864e8da952fe2b8d6616bd

● ○

Aktiviteter ▾

Fakturering

Kommende fakturaer

0

Forfalte faktur...
- ikke opprettet

3

Varer i arbeid

VIA ikke bokført

0

Brukeroppgaver

Mine brukeroppgaver

Ventende brukeroppgaver

Godkjenninger

Venter på godkjenninger

Forespørsler s...
til godkjenning

Forespørsler a
godkjenne

Nye anmelte

Anmelte som
pågår

Send timel

Mine innstillinger - USER_9AFD2BD6F1864E8DA95...

Rolle Prosjektleder ...

Selskap CRONUS NO ...

Arbeidsdato 10.10.2023 📅

Område

Språk Norwegian Bokmål (Norway) ...

Tidssone (UTC+01:00) Amsterdam, Berlin, Bern, Ro... ...

Varsler **Endre når jeg mottar varslinger.**

Læringstips

Gammelt handlingsfelt

Filer

Skylagring user_9afd2bd6f1864e8da952fe2b8d6616bd sin...

Sikkerhet

Siste pålogging var den 12.11.24 14:46.

OK Avbryt

#46: Mine innstillinger - Endre når jeg mottar varslinger

The screenshot shows the 'Mine varsler' (My notifications) settings window. The window title is 'Mine varsler'. Below the title, there is a search icon and a 'Rediger oversikt' (Edit overview) button. The main content is a table with three columns: 'Melding', 'Aktivert', and 'Betingelser'. The first row is highlighted in blue and has a right-pointing arrow in the 'Melding' column. The 'Aktivert' column contains checkboxes, and the 'Betingelser' column contains dashes or '(Vis filterdetaljer)'. A 'Lukk' (Close) button is located at the bottom right of the window.

Melding	Aktivert	Betingelser
→ Bekreft merkede bestillinger som fakturerte.	<input checked="" type="checkbox"/>	-
Varsle brukeren om planlagte synkroniseringspro...	<input checked="" type="checkbox"/>	-
Vis advarsel før bokføring av kjøpslinjer med anta...	<input checked="" type="checkbox"/>	-
Varsle bruker om sandkassemiljø.	<input checked="" type="checkbox"/>	-
Varsle bruker om manglende standard dimensjon...	<input checked="" type="checkbox"/>	-
Oppdater Salg til-kundeadresse	<input checked="" type="checkbox"/>	-
Vis forslag om å opprette kontakter for nyopprett...	<input checked="" type="checkbox"/>	-
Tilgjengeligheten av monteringsstykklister er lav.	<input checked="" type="checkbox"/>	(Vis filterdetaljer)
Du kan få betalingsprognosen oppdatert automa...	<input checked="" type="checkbox"/>	-
Varsle brukeren om bildeanalysefunksjoner ved o...	<input checked="" type="checkbox"/>	-
Oppdater Betal til-leverandøradresse	<input checked="" type="checkbox"/>	-
Varetilgjengeligheten er lav.	<input checked="" type="checkbox"/>	(Vis filterdetaljer)
Opprinnelig systemtillatelsessett er endret	<input checked="" type="checkbox"/>	-
Kundens kredittgrense er overskredet.	<input checked="" type="checkbox"/>	(Vis filterdetaljer)
Foreslå handlingen Oppdater på siden Dataadmi...	<input checked="" type="checkbox"/>	-

Takk takk!