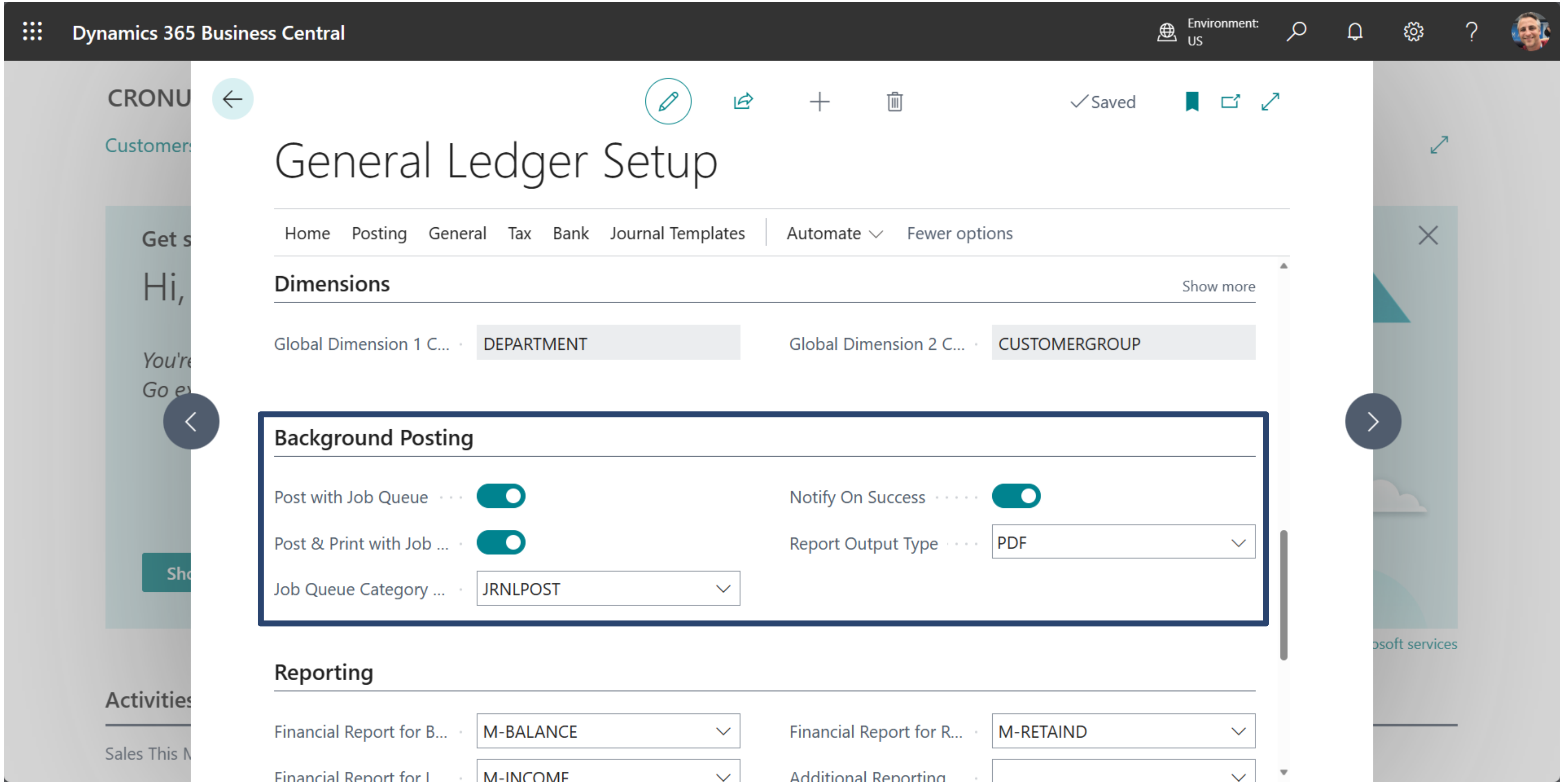
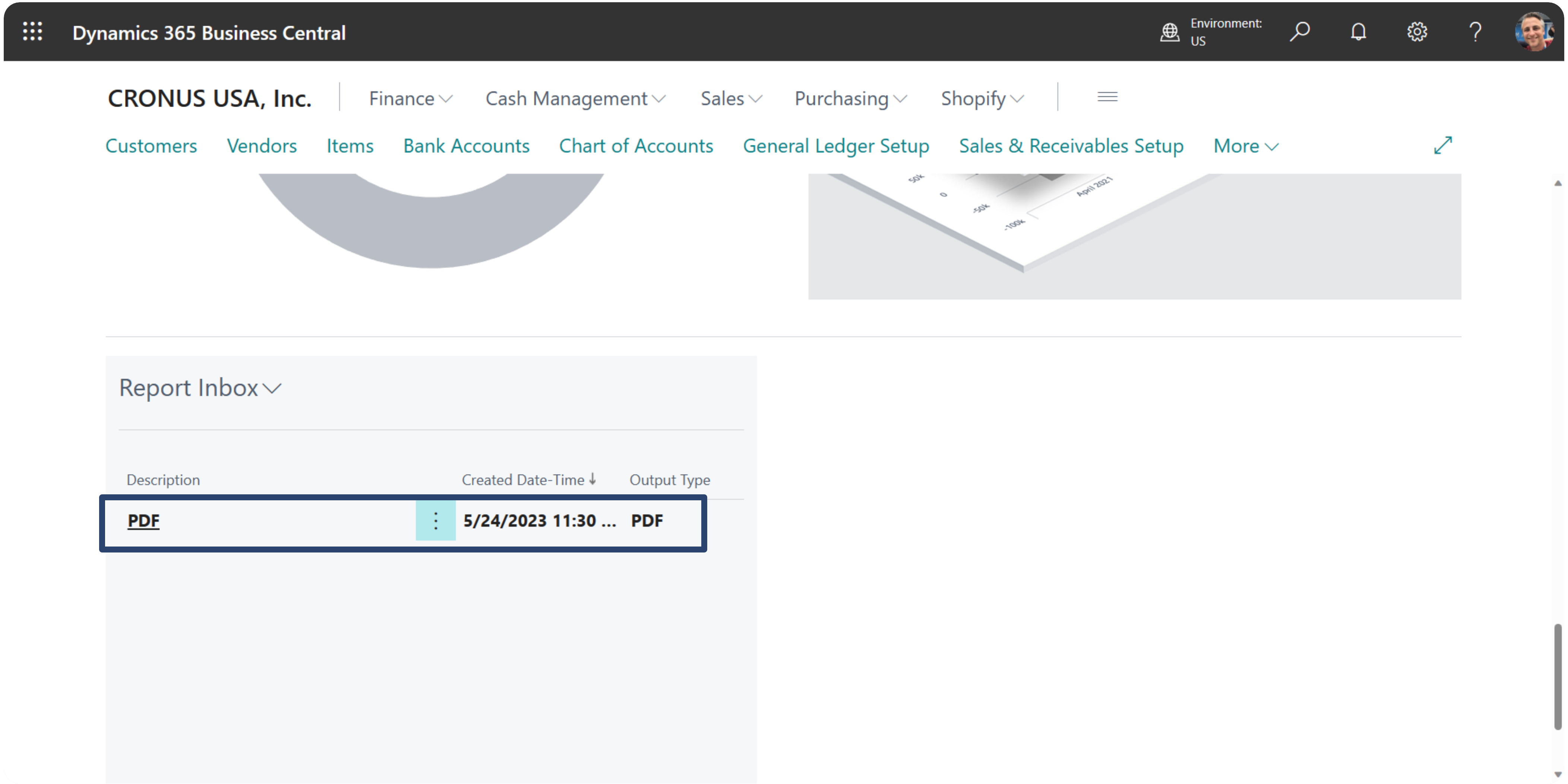
45 tips in 45 minutes
Business Central

Tip # 1

#1: Use Background Posting to boost productivity

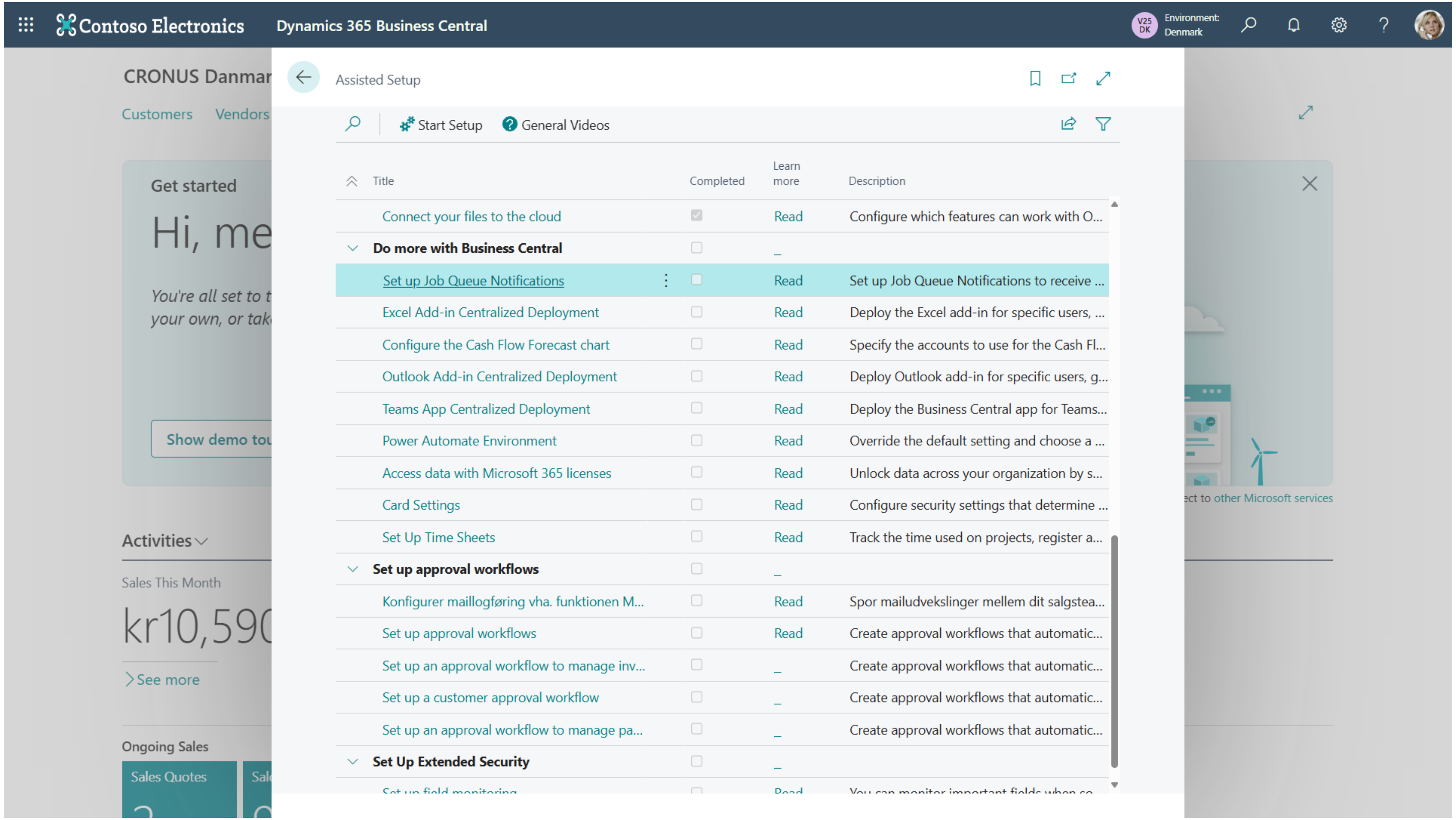


#1: Use Background Posting to boost productivity



Tip # 2

#2: Get notified about Job Queue failures



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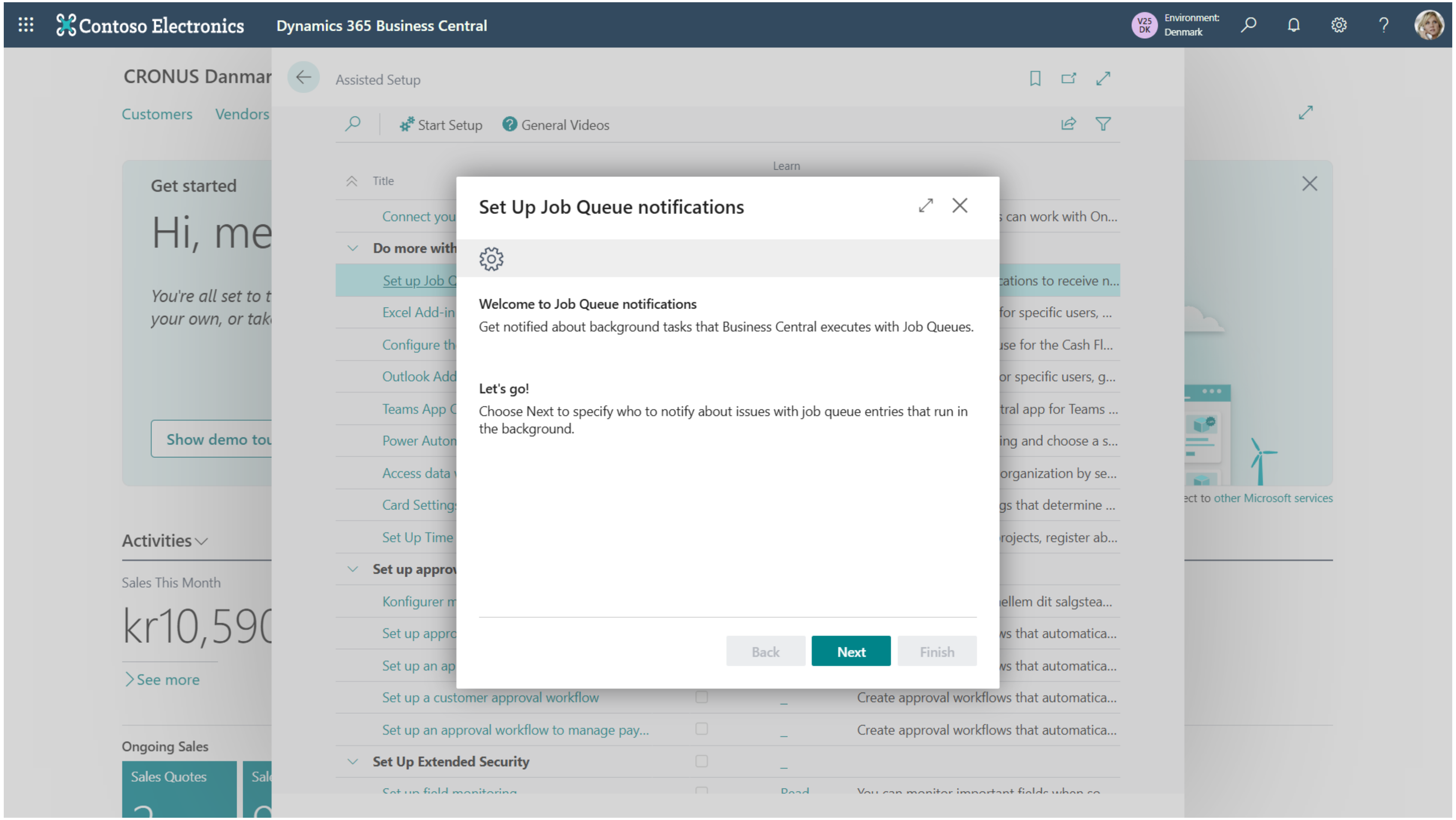

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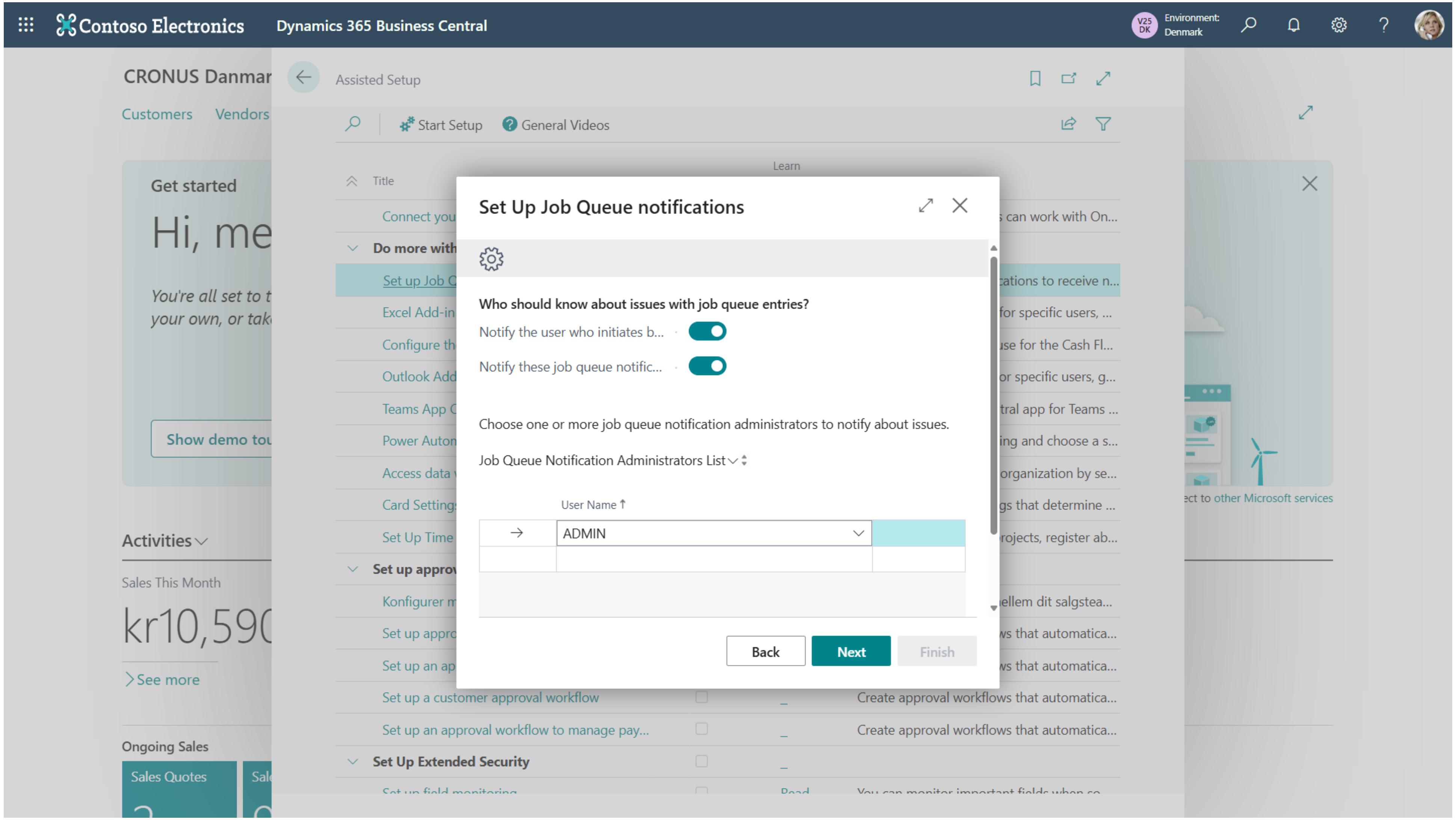

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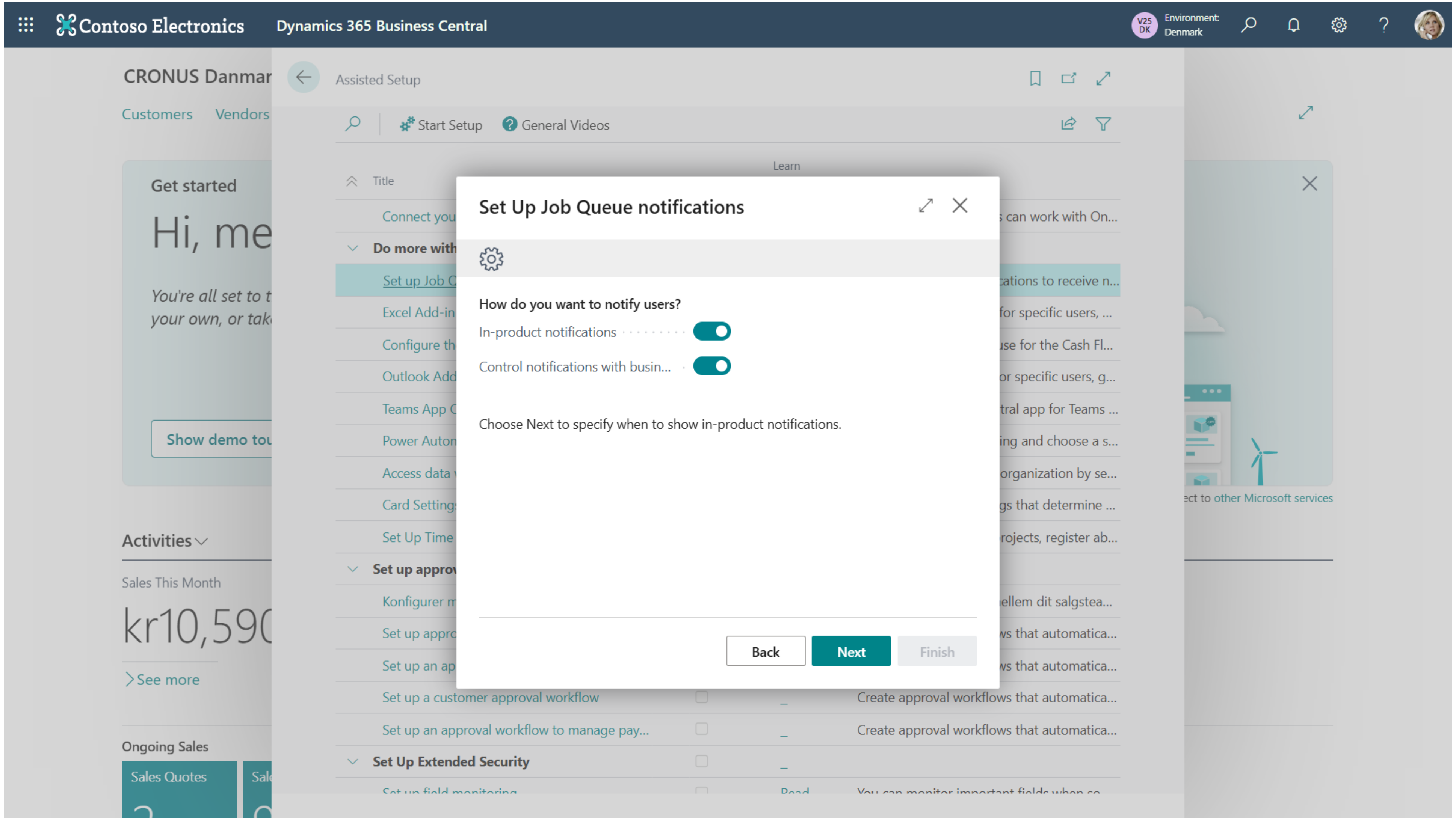

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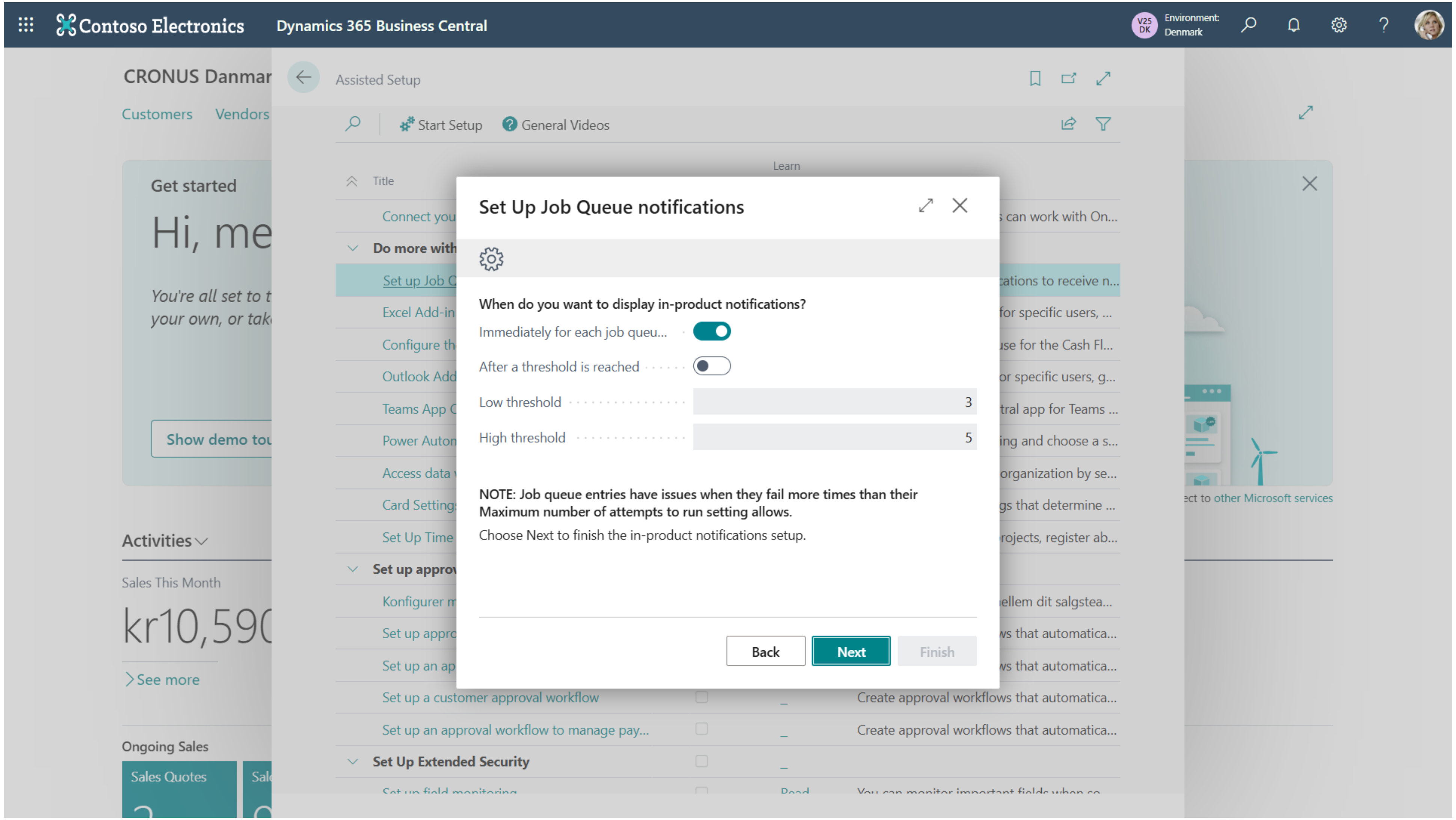

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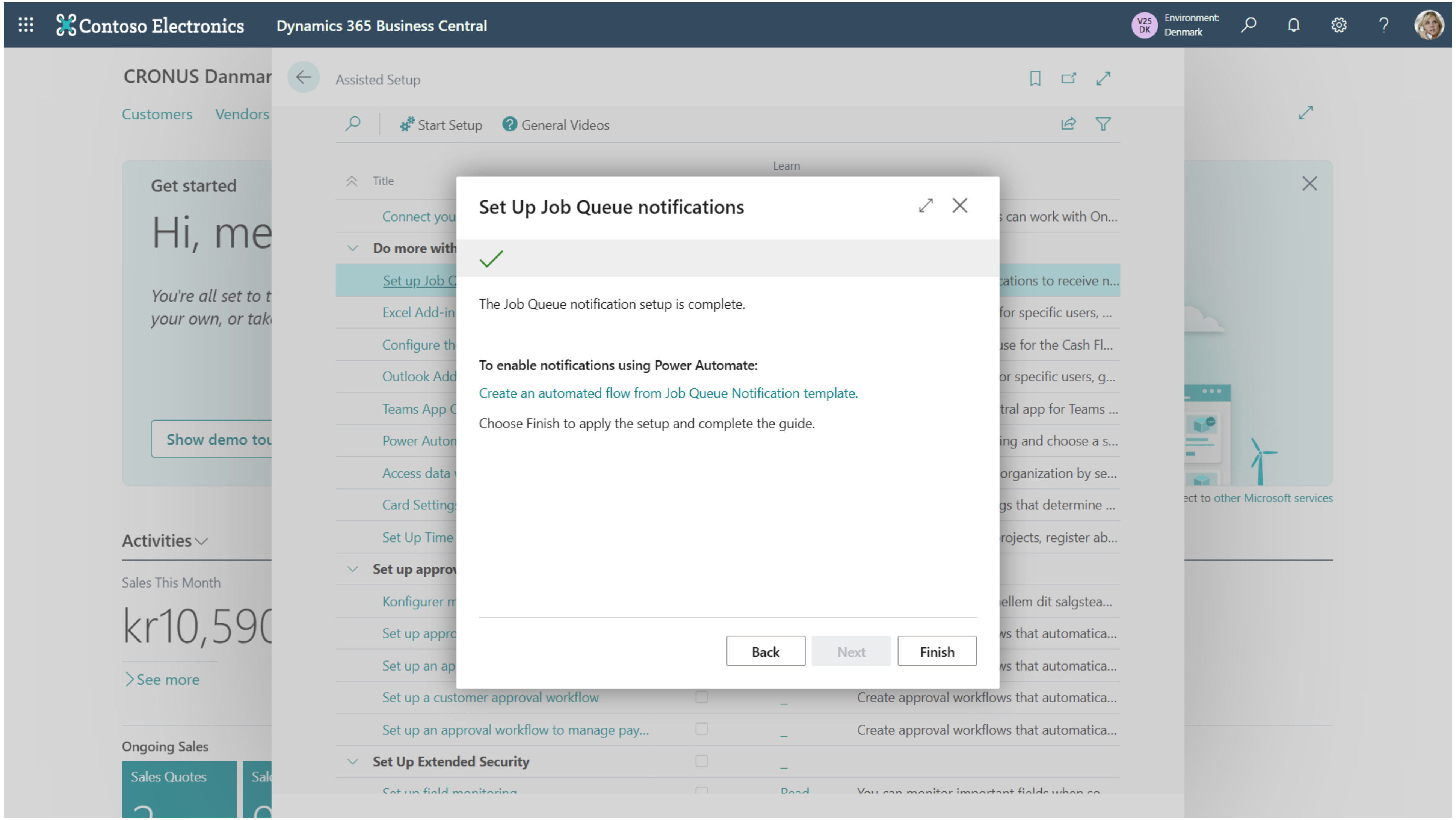

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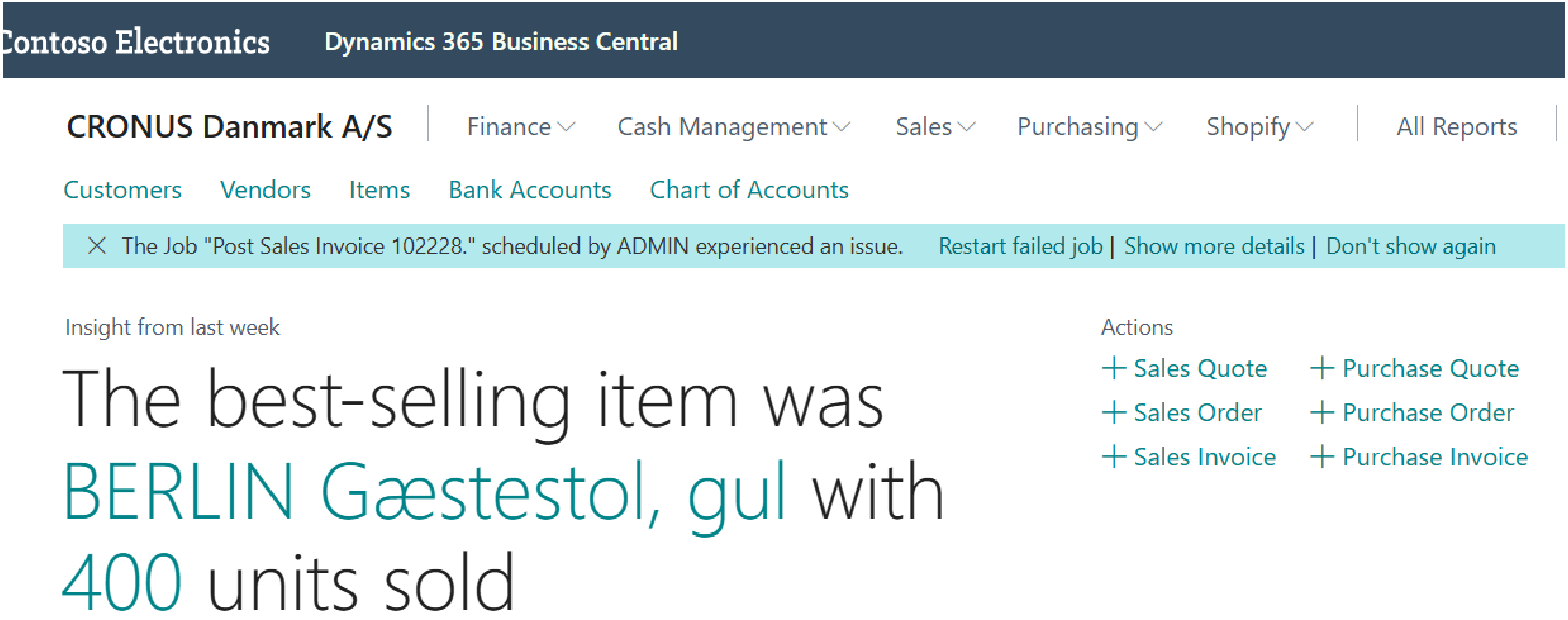

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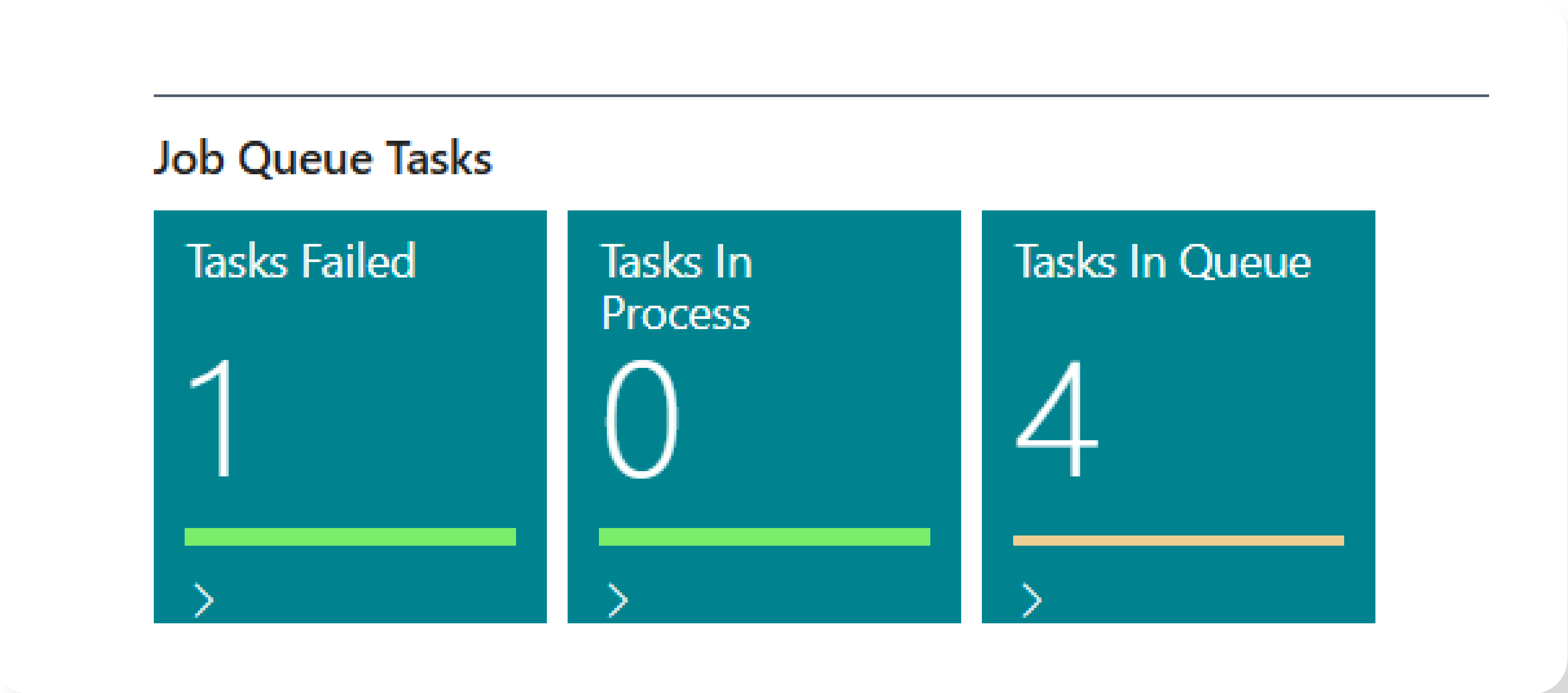
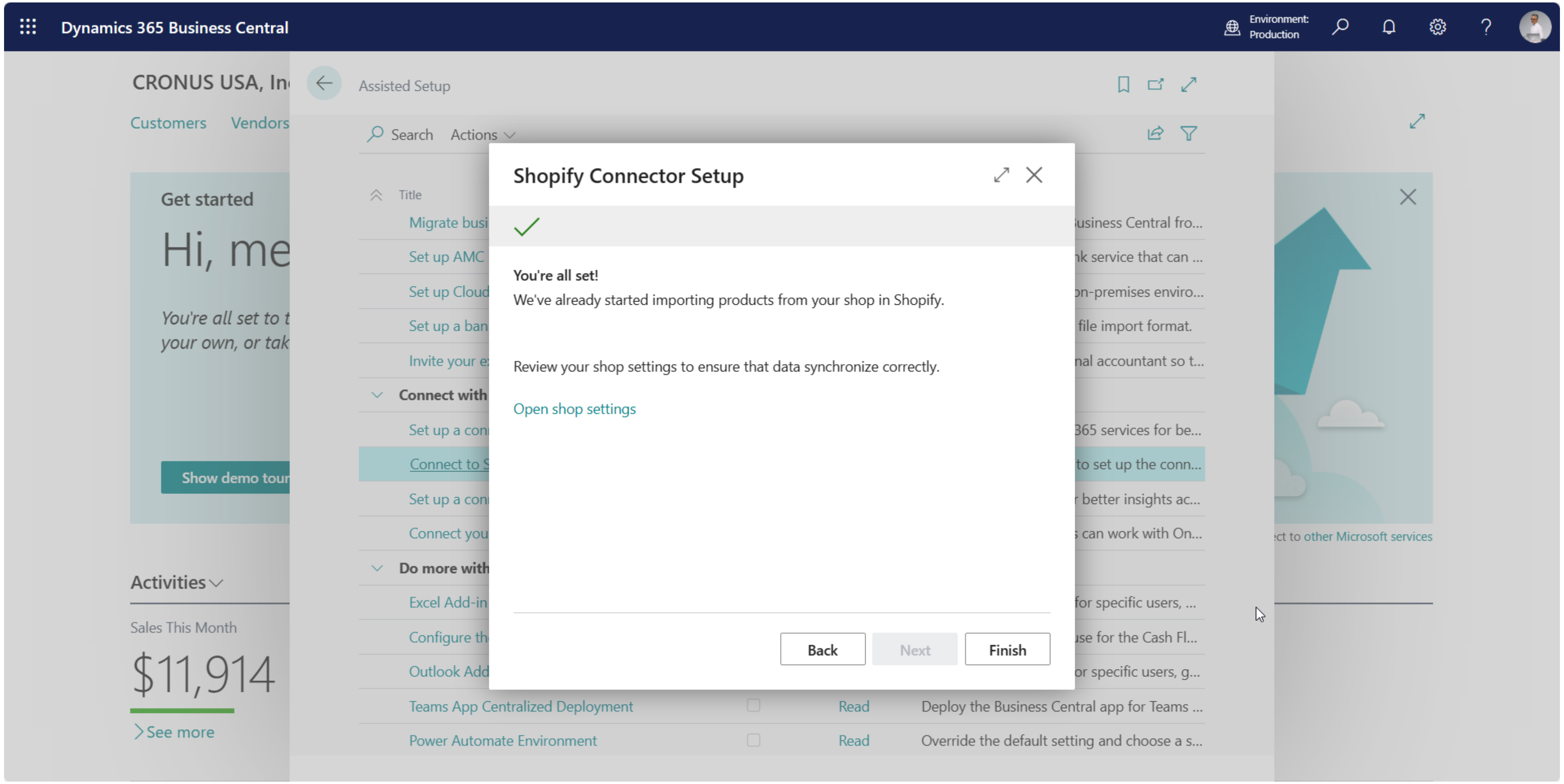


Regular users see their <u>own</u> job queues

Job Queue Notification Administrators see <u>all</u>

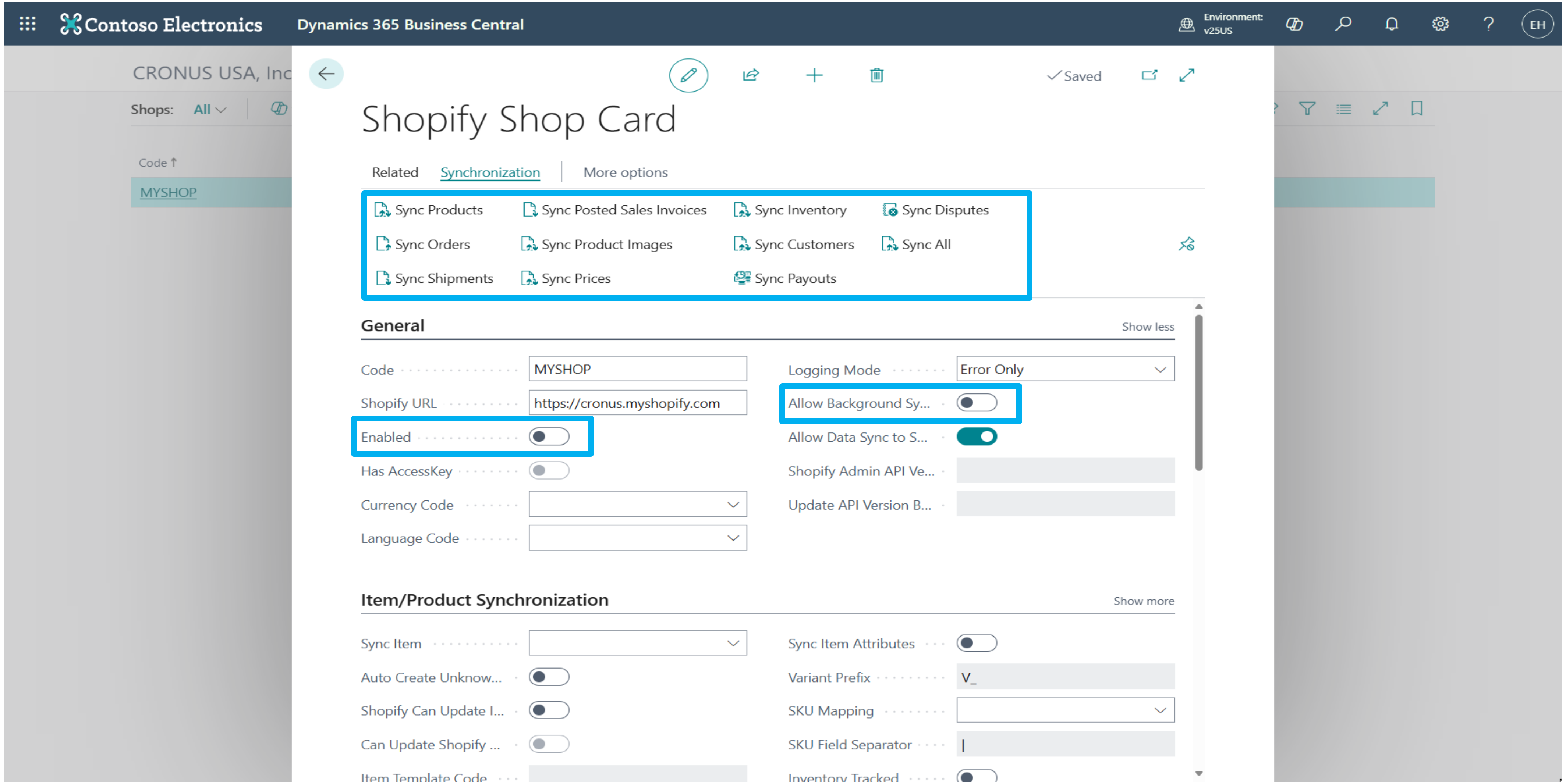
Tip # 3

#3: Easily connect your Shopify store to Business Central



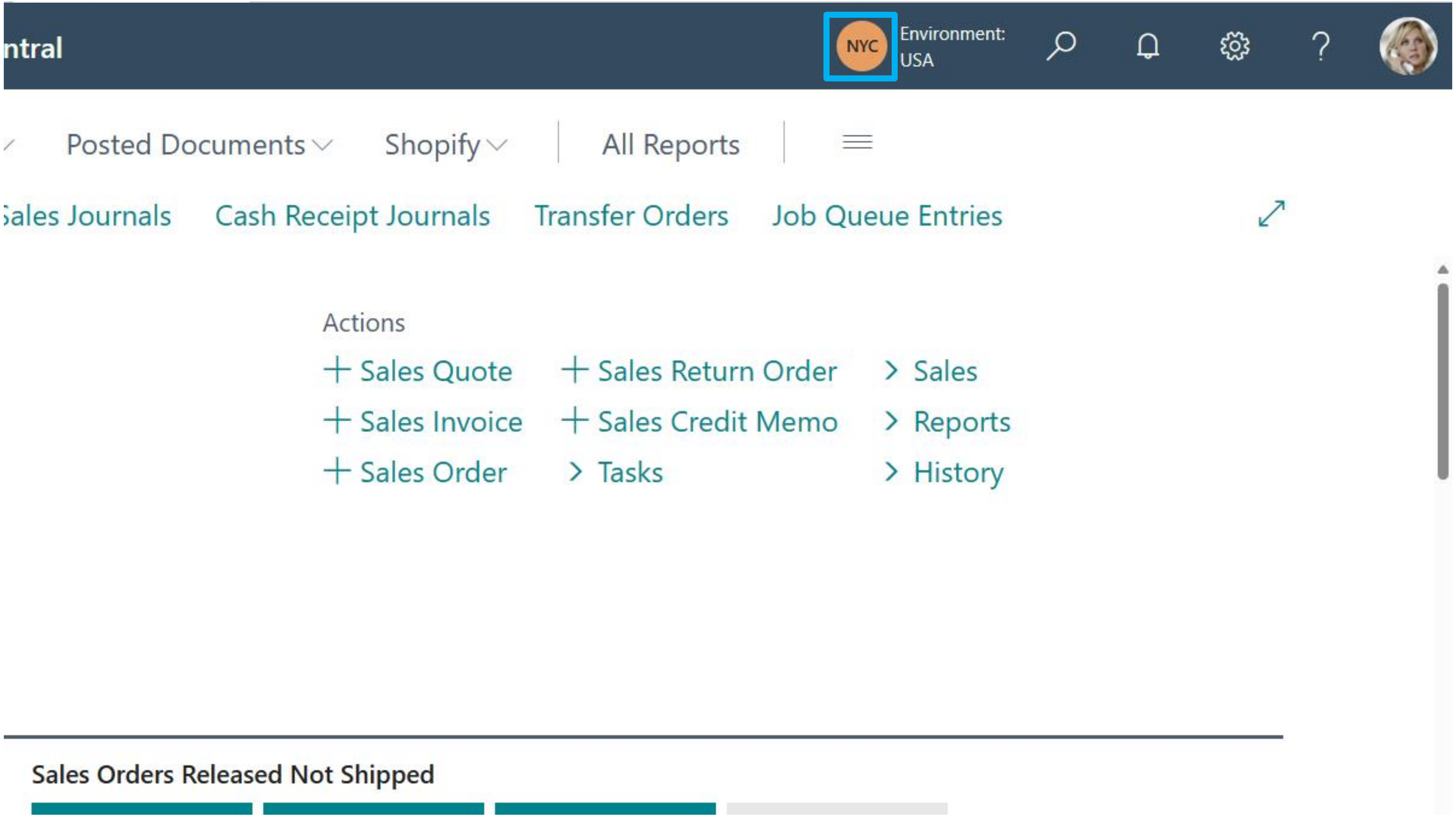
Tip # 4

#4: Troubleshoot Shopify integration – run in the foreground

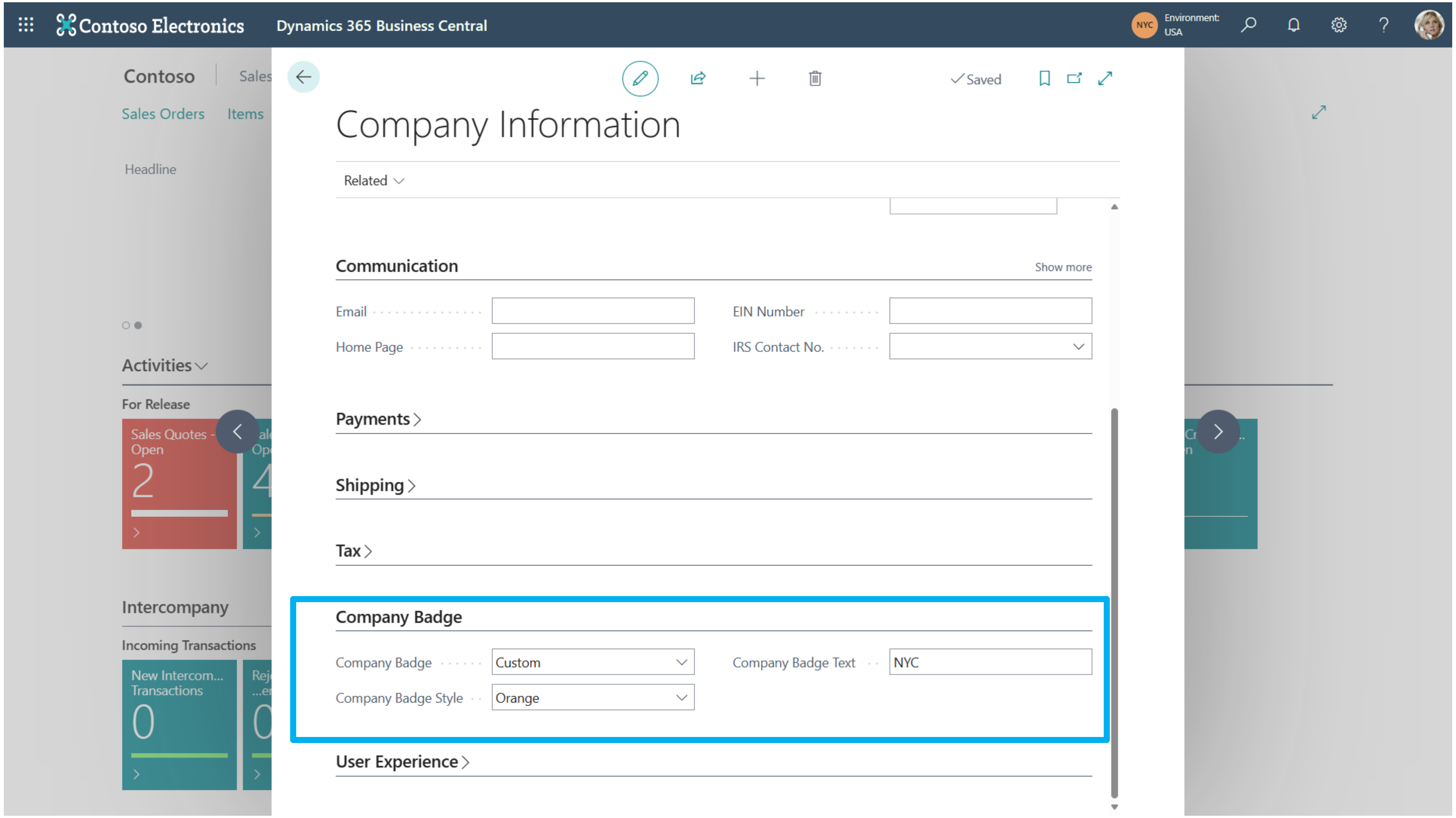


Tip # 5

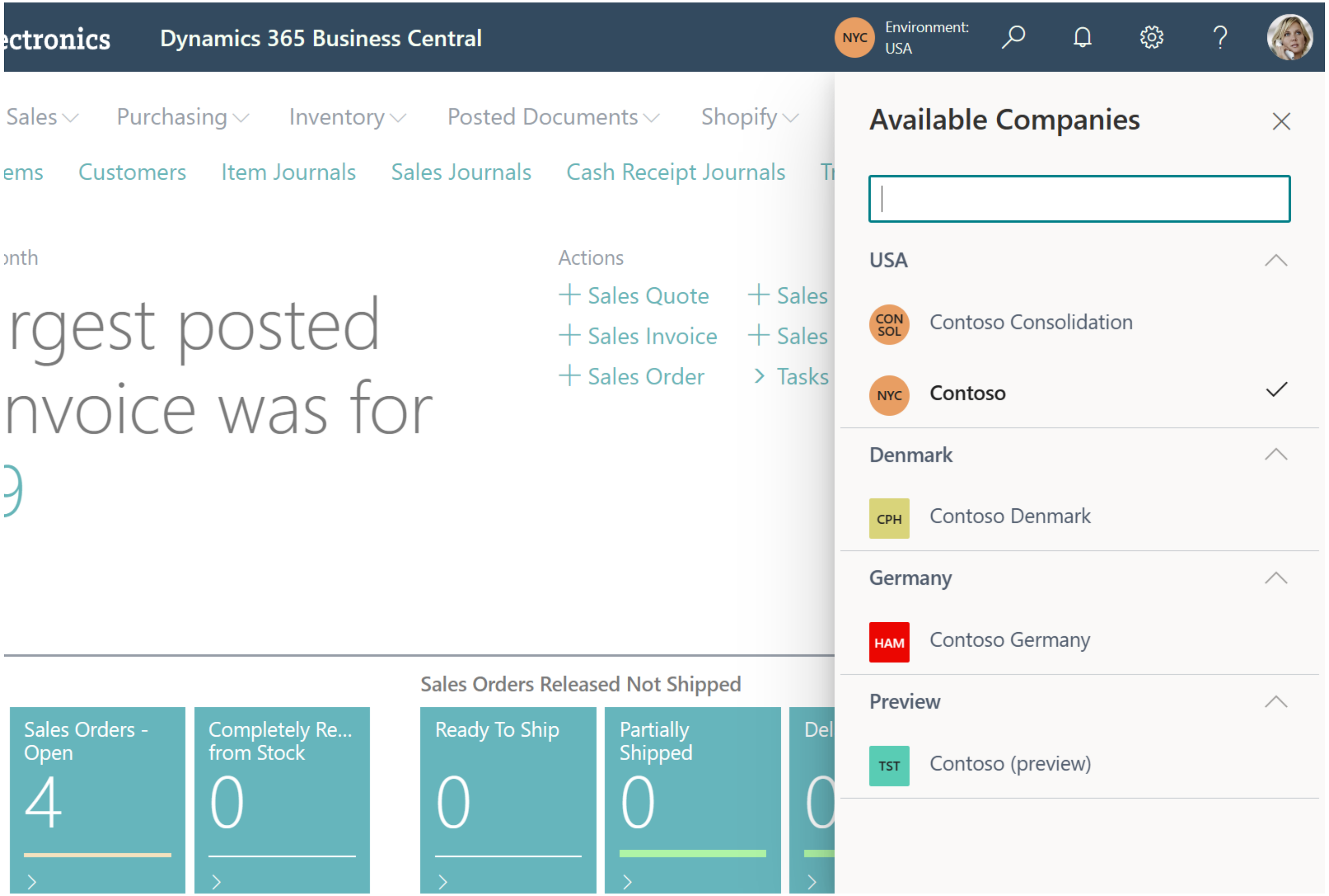
#5: Use a company badge to help identify the company



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

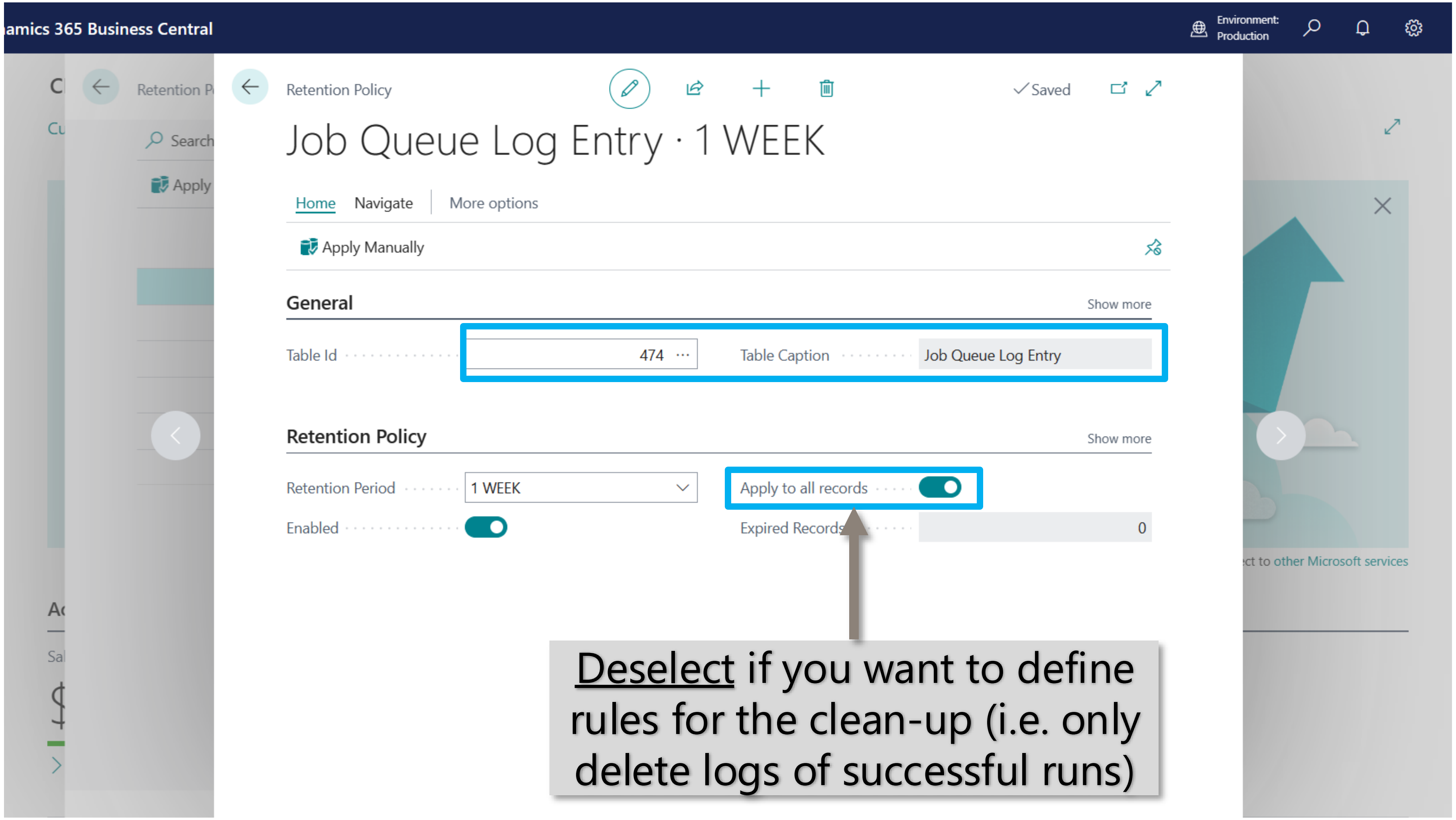


#5: Use a company badge to help identify the company



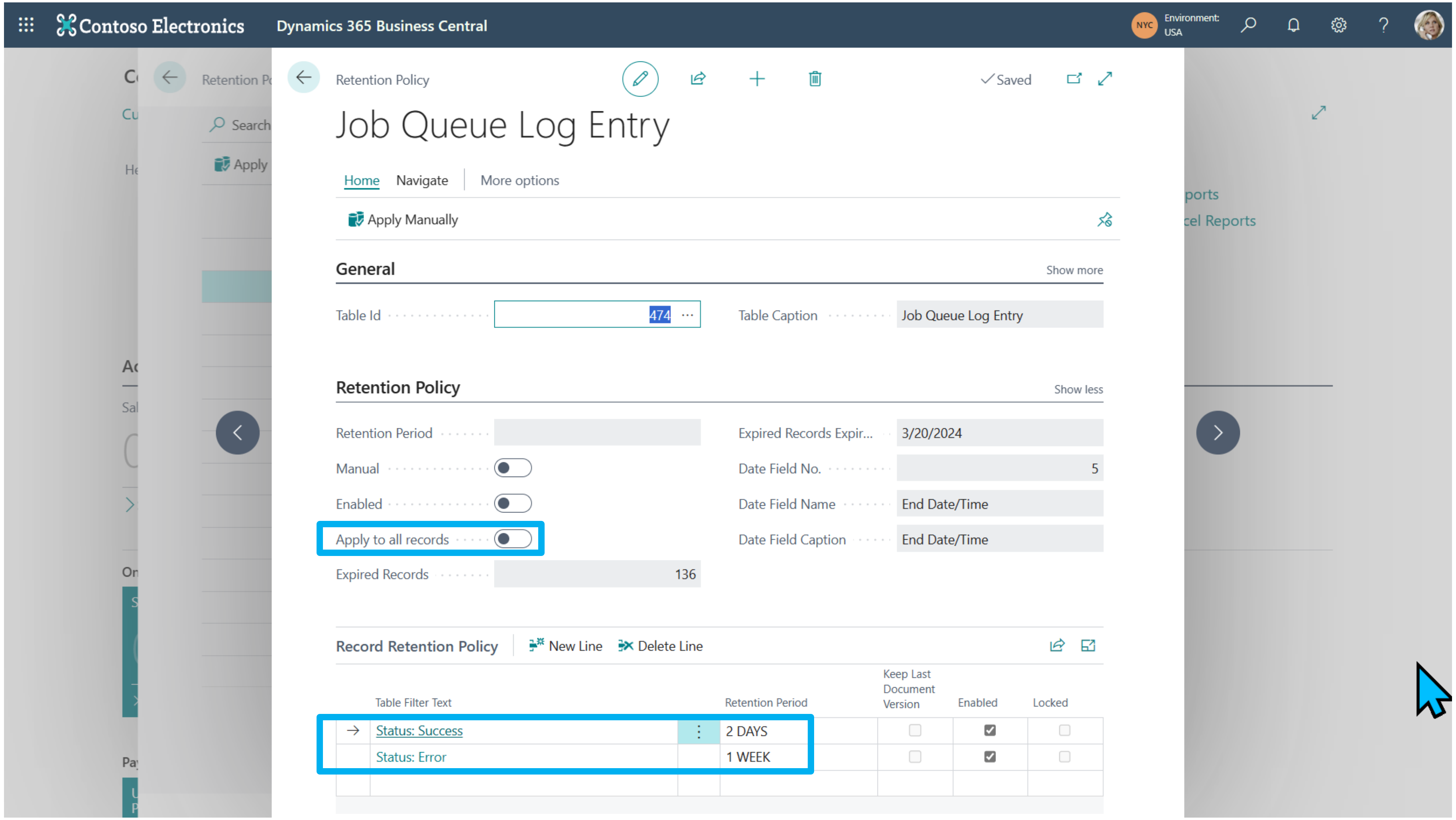
Tip # 6

#6: Save database cost. Use Retention Policies to automatically clean up data

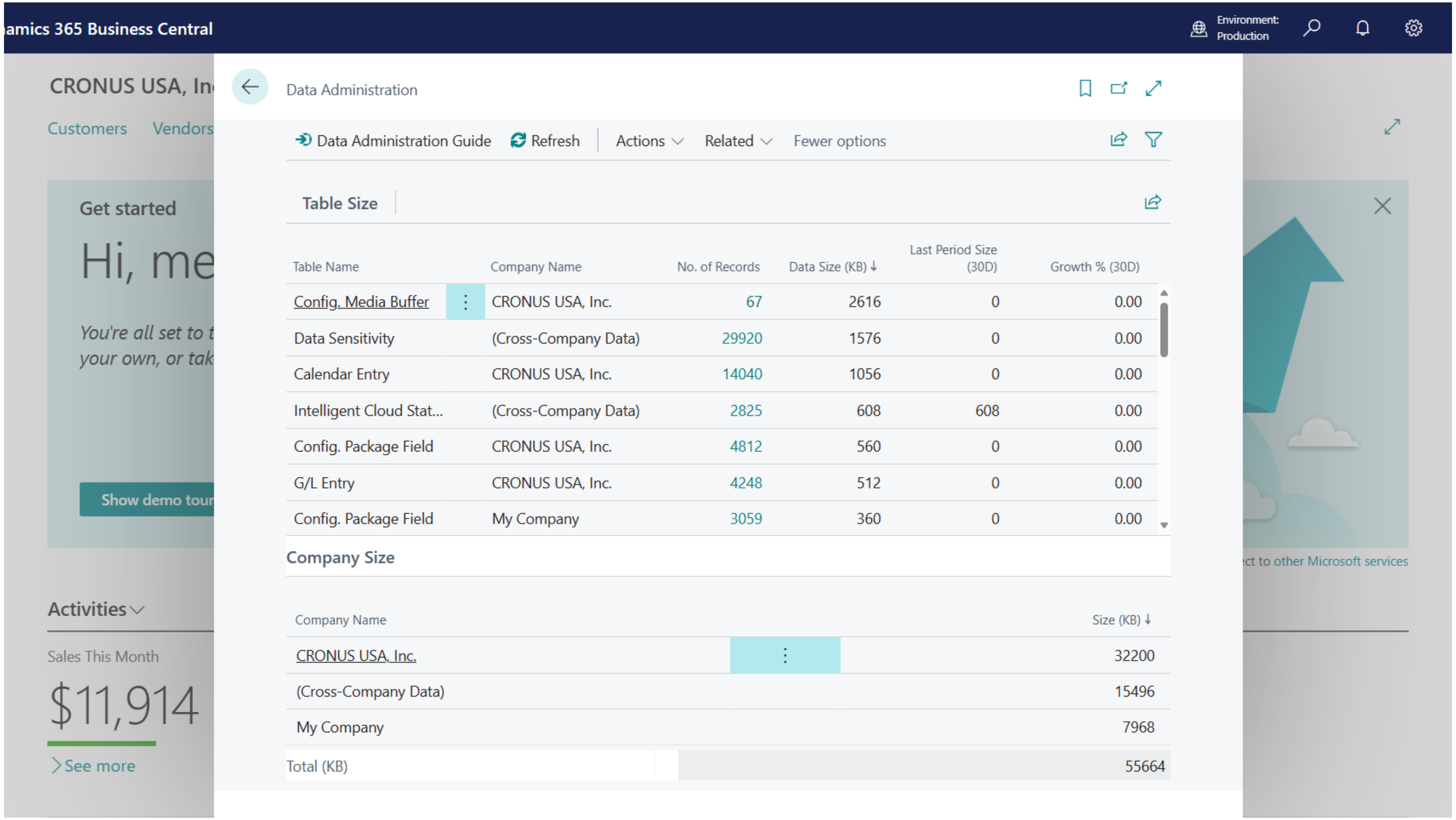


Deselect if you want to define rules for the clean-up (i.e. only delete logs of successful runs)

#6: Save database cost. Use Retention Policies to automatically clean up data

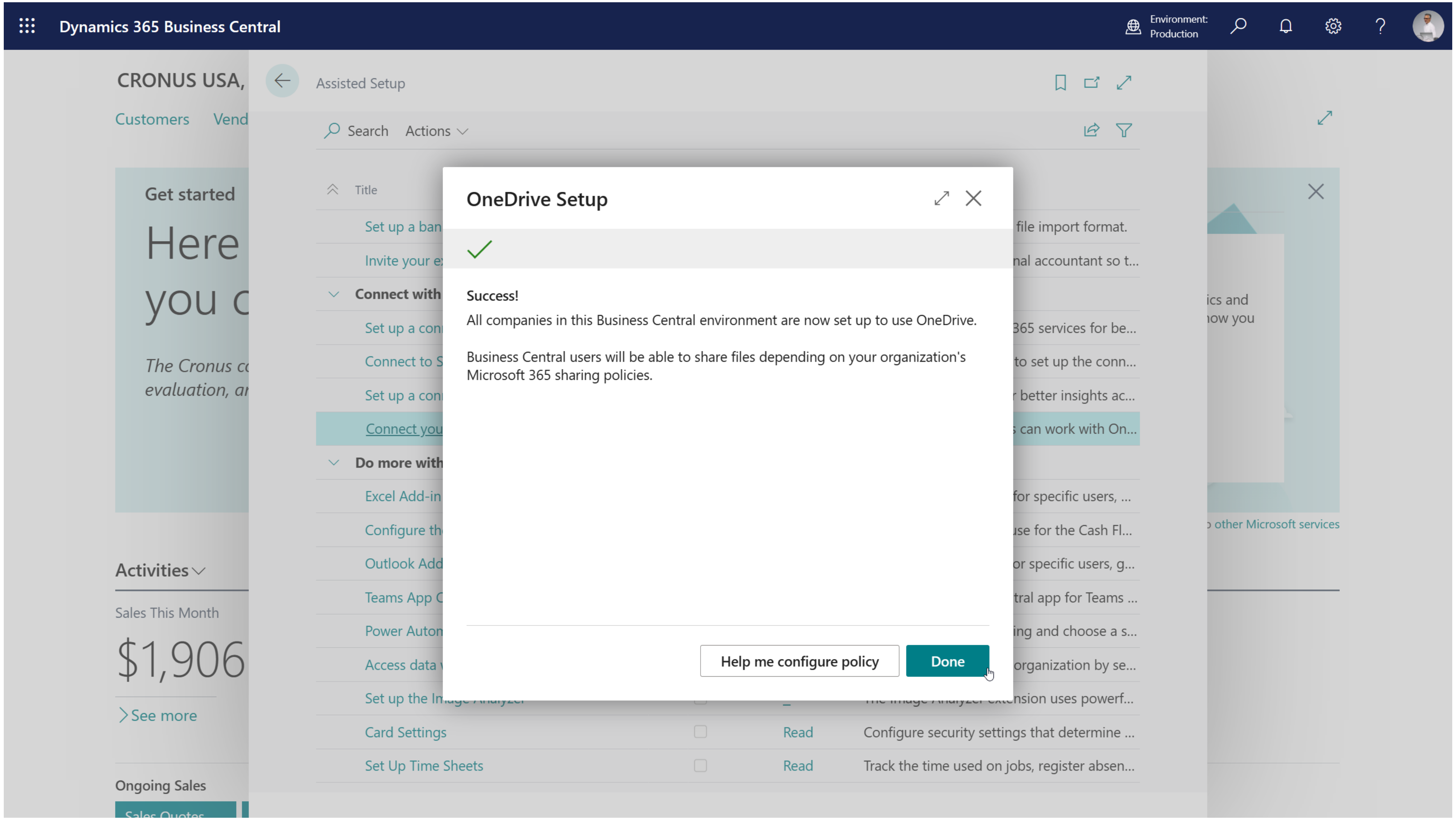


#6: Save database cost. Get company & table size from Data Administration

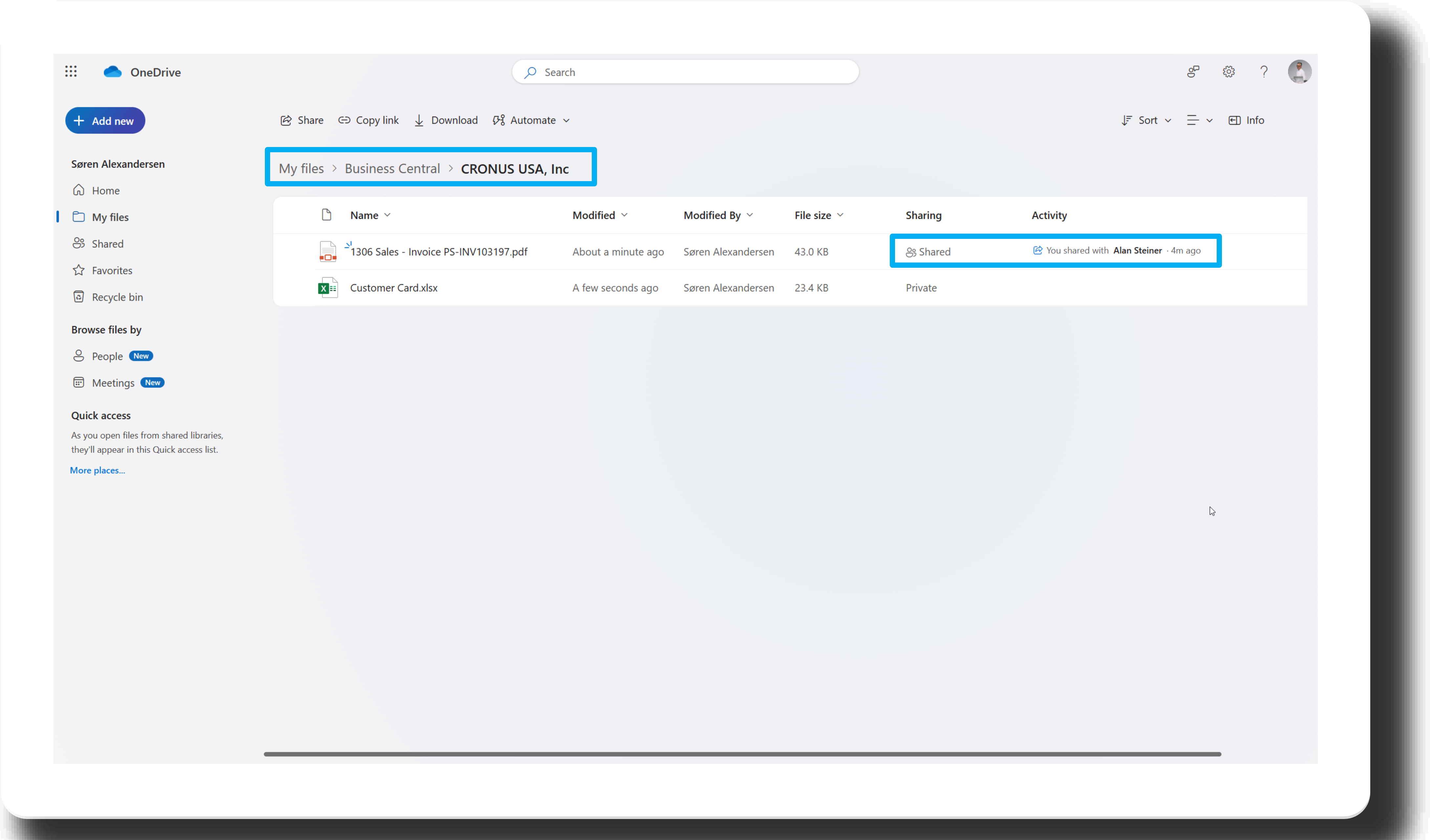


Tip # 7

Setup tip # 1: Enable OneDrive integration for smooth collaboration

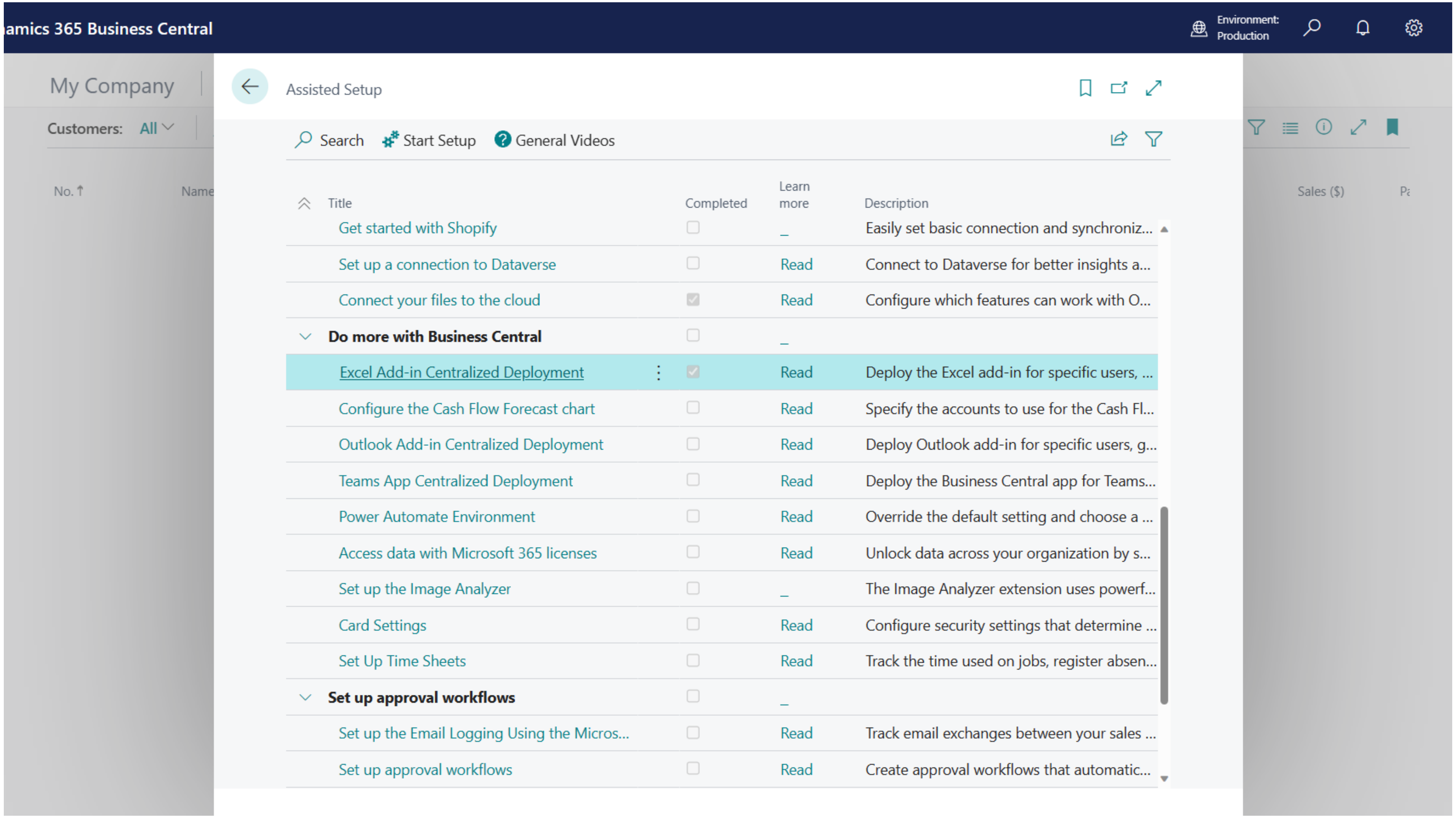


#1: Enable OneDrive integration for smooth collaboration



Tip # 8

#8: Deploy the Excel add-in so you can work with any list data in Excel



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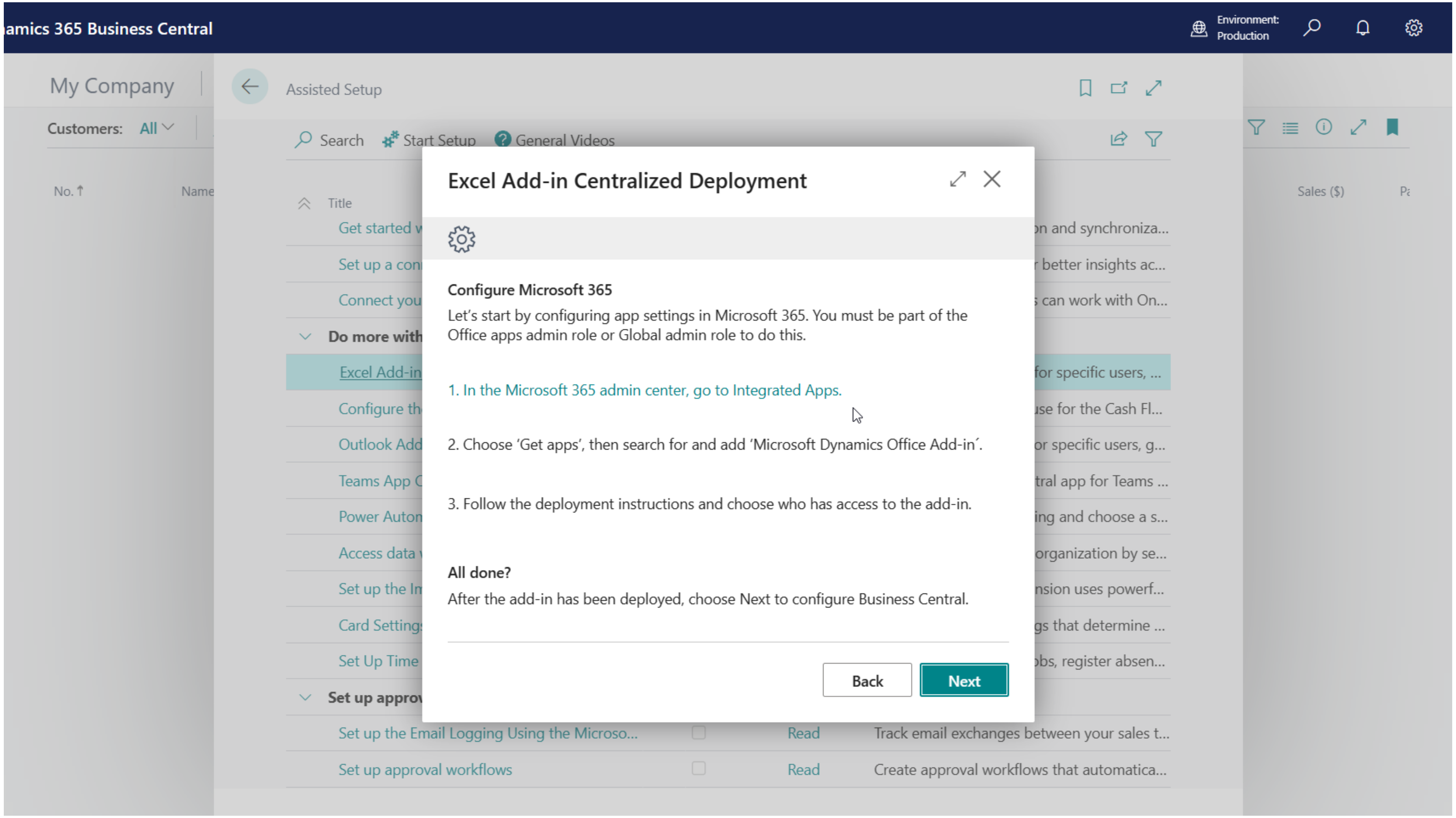

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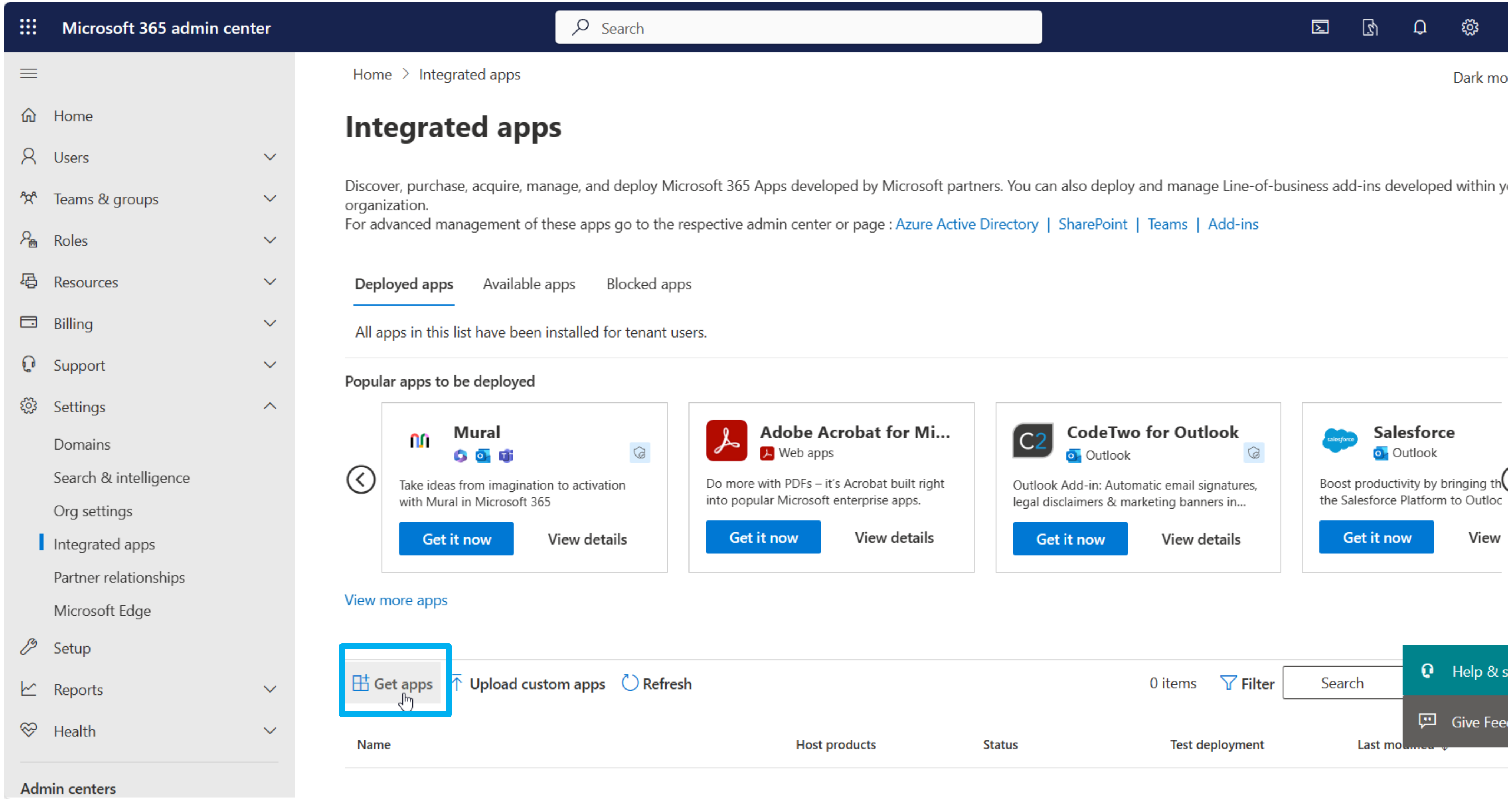

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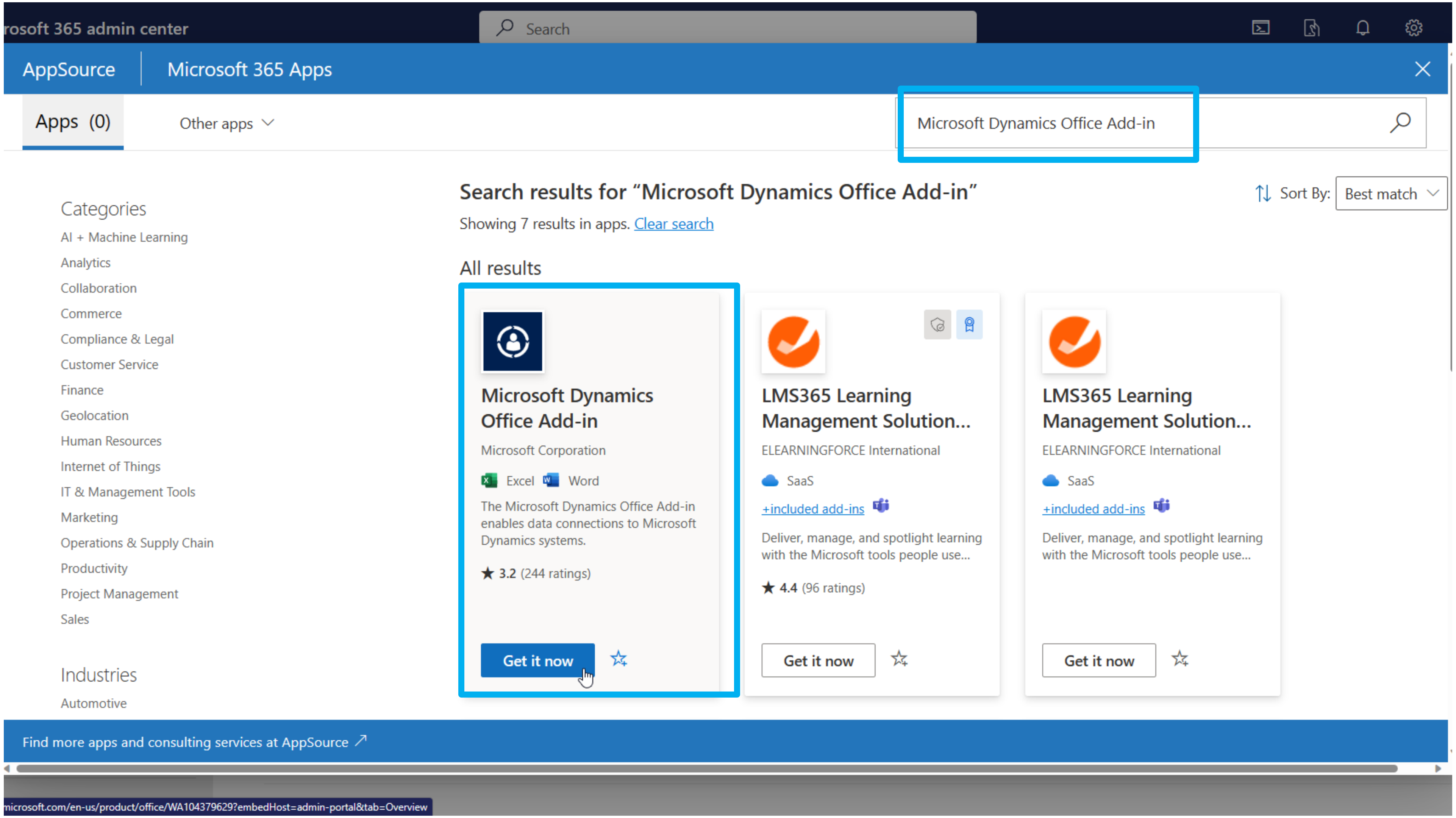

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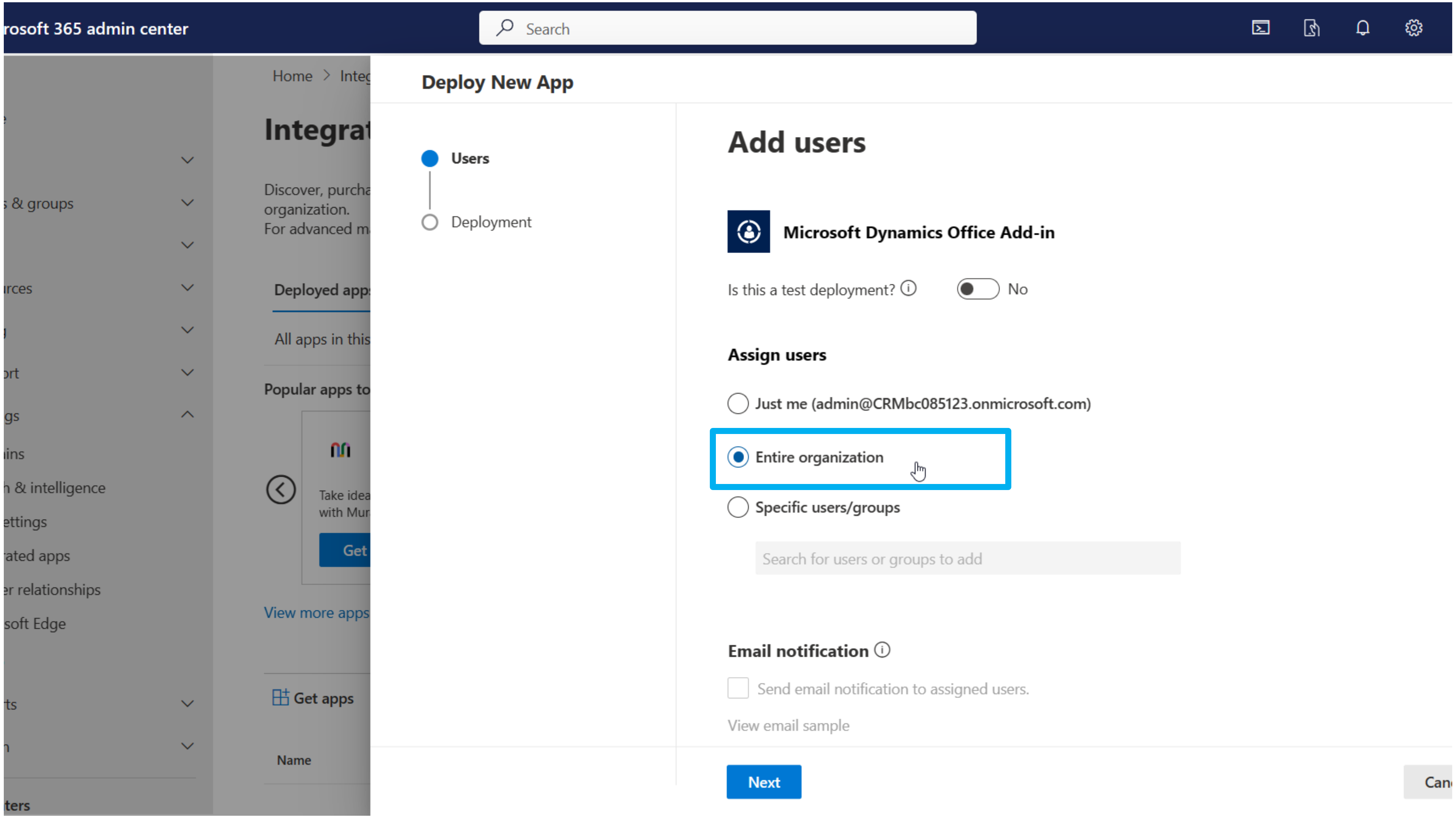

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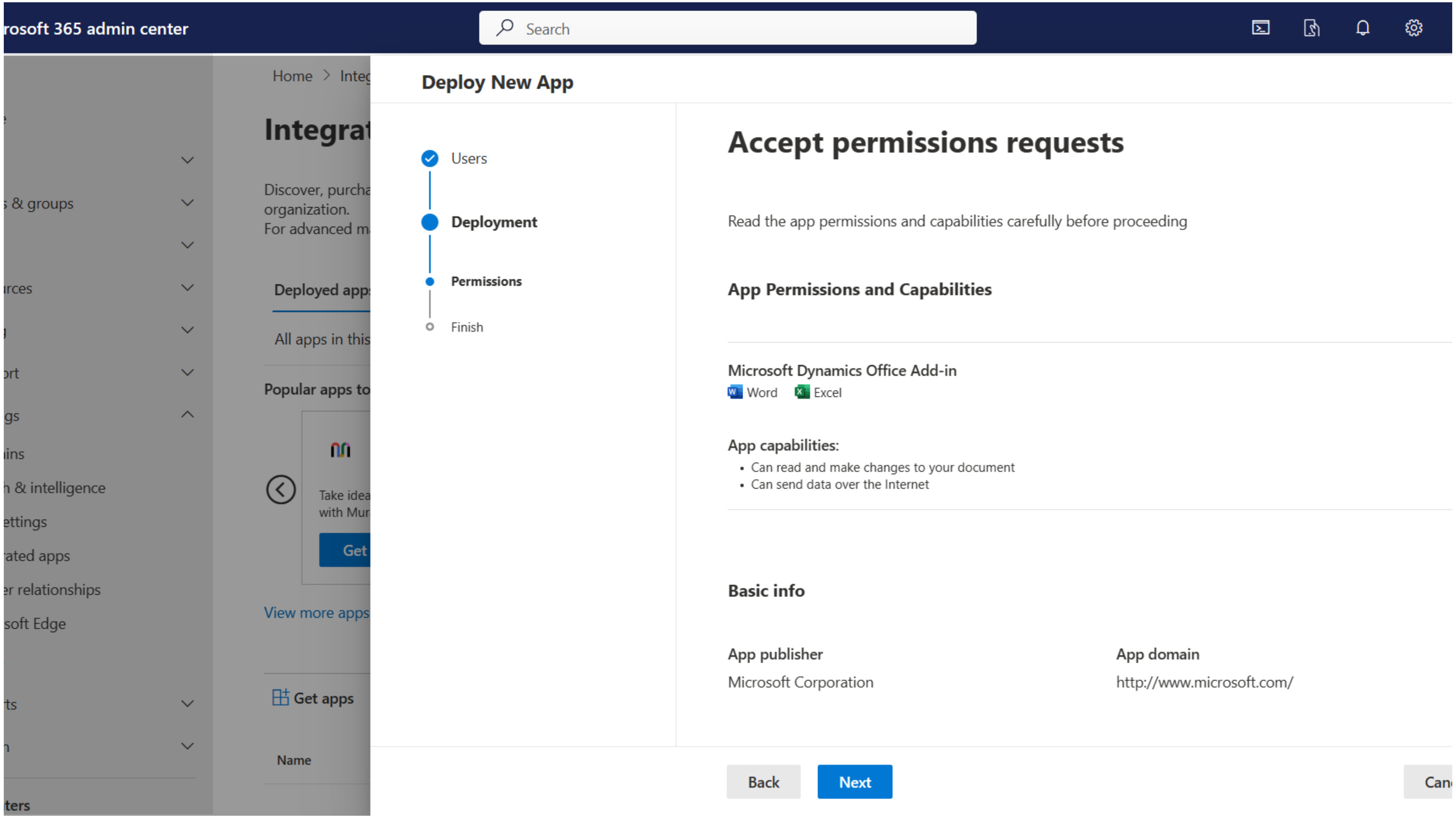

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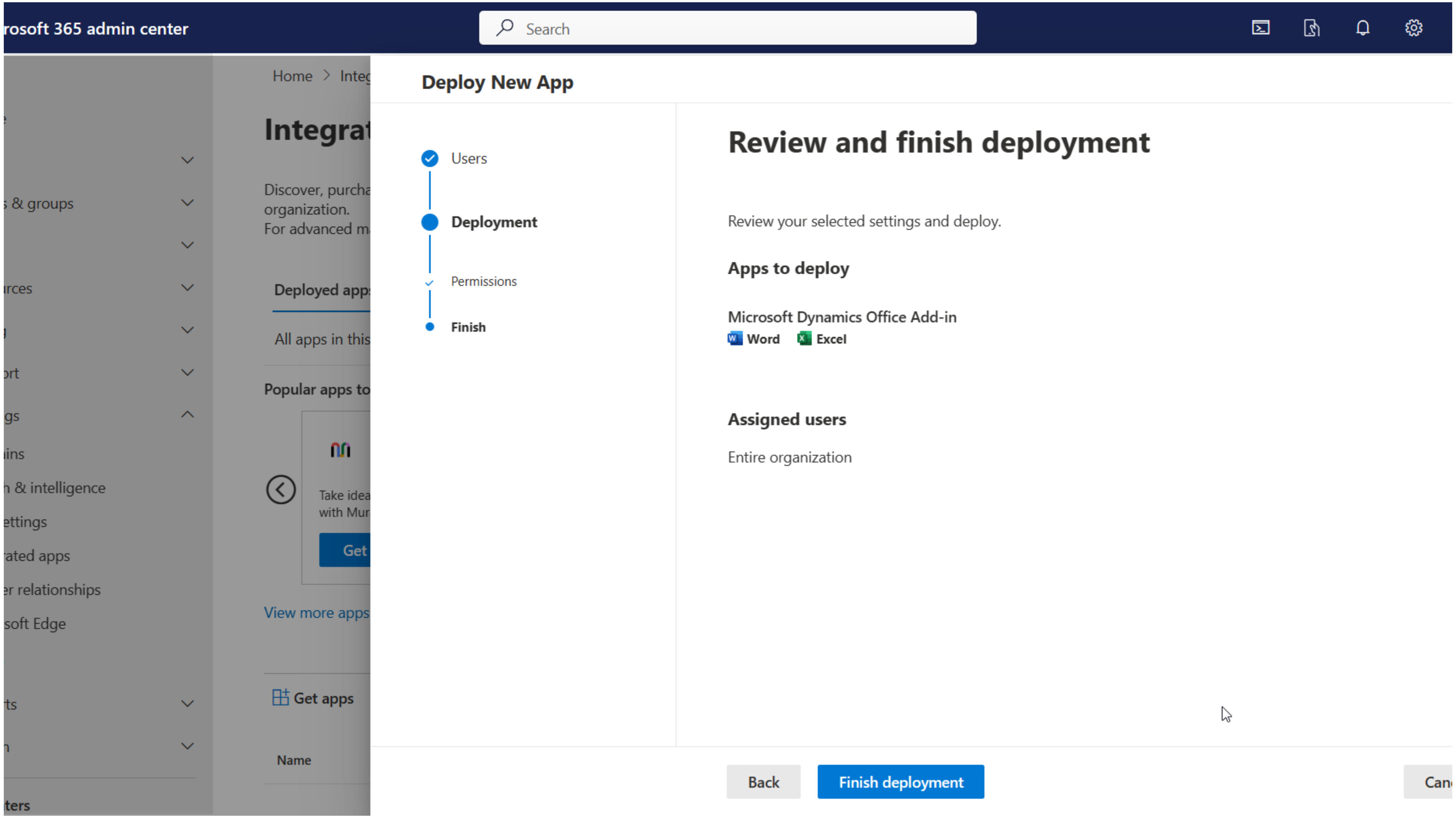

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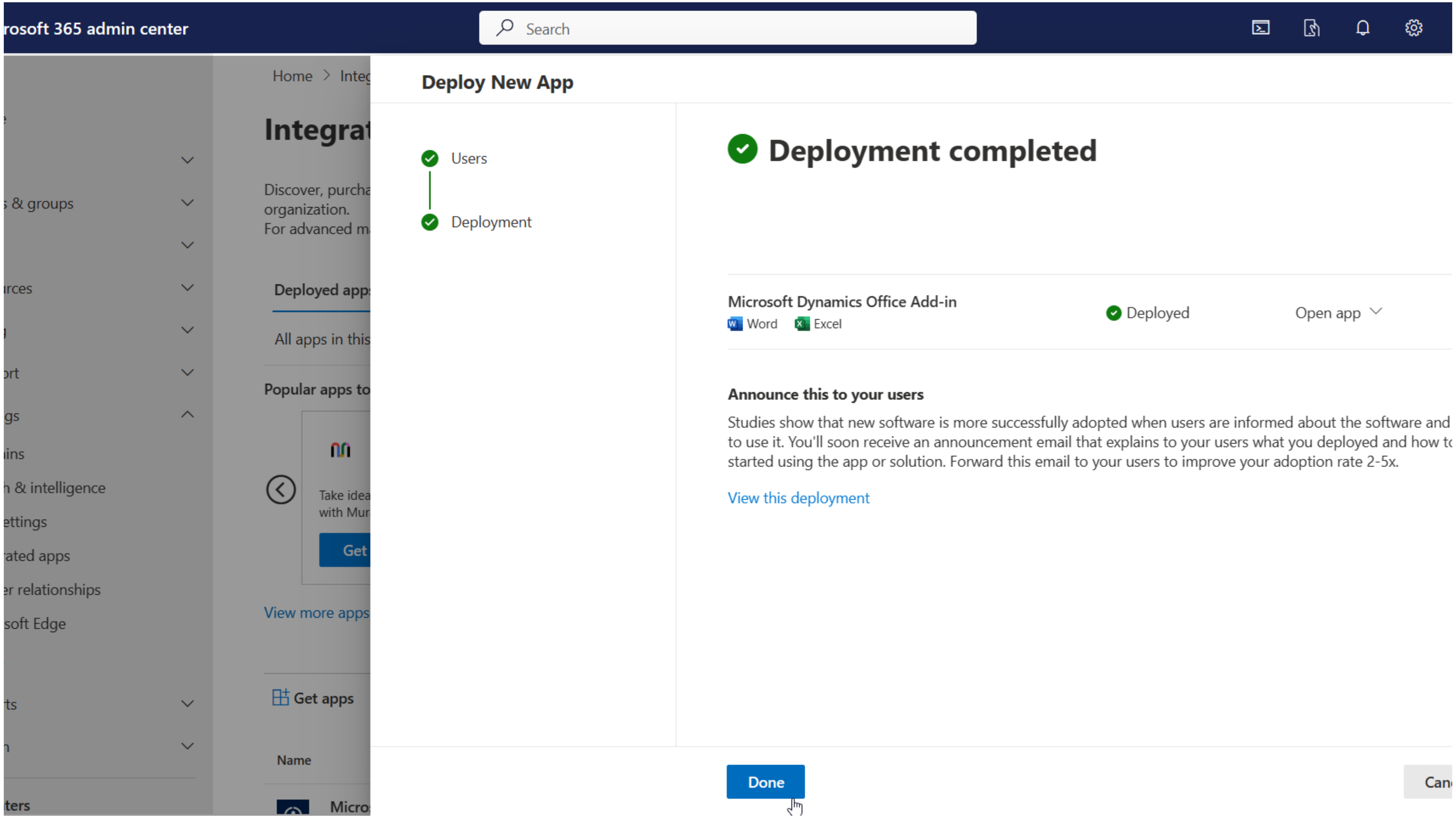

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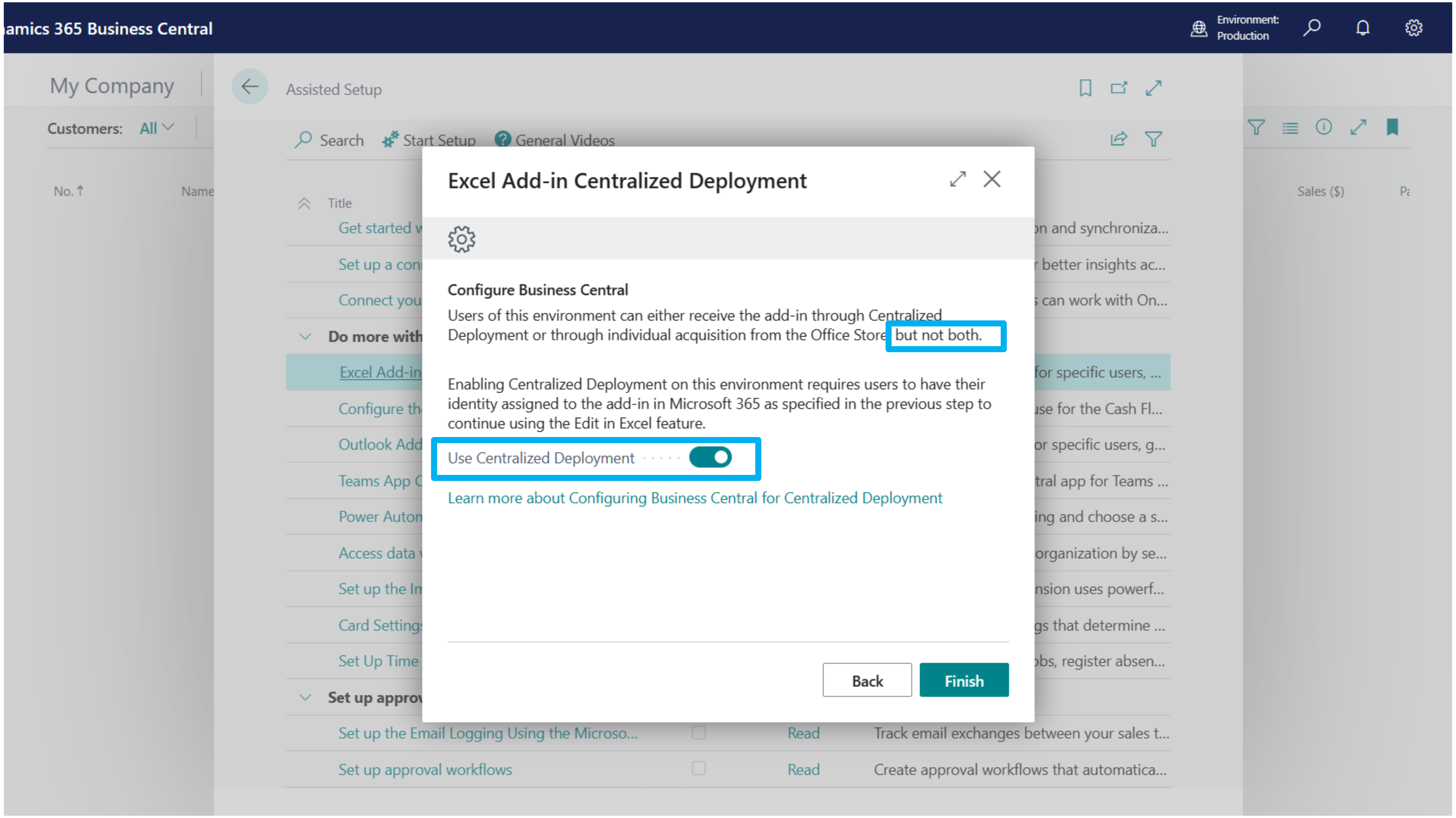
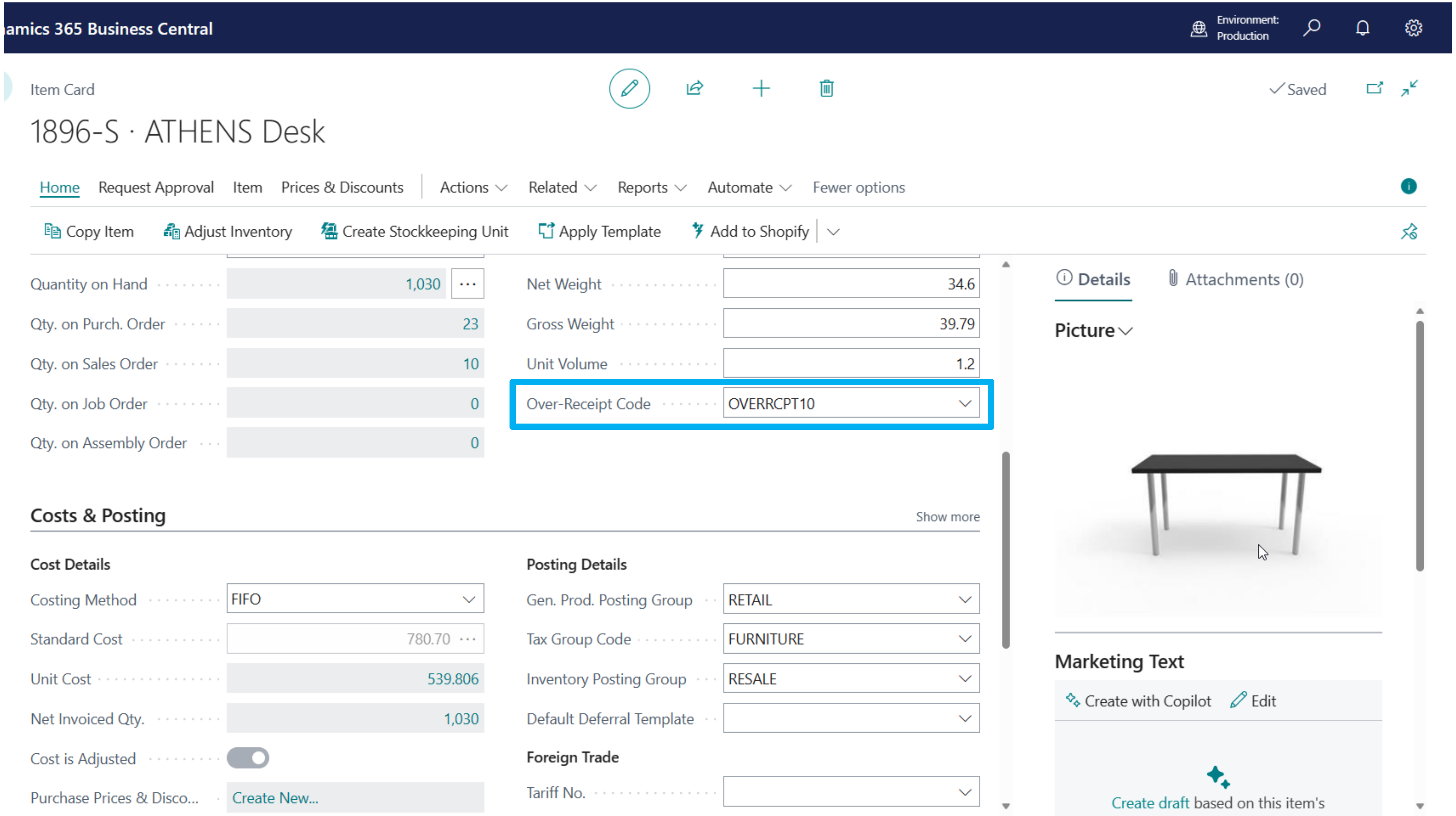


Tip # 9

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



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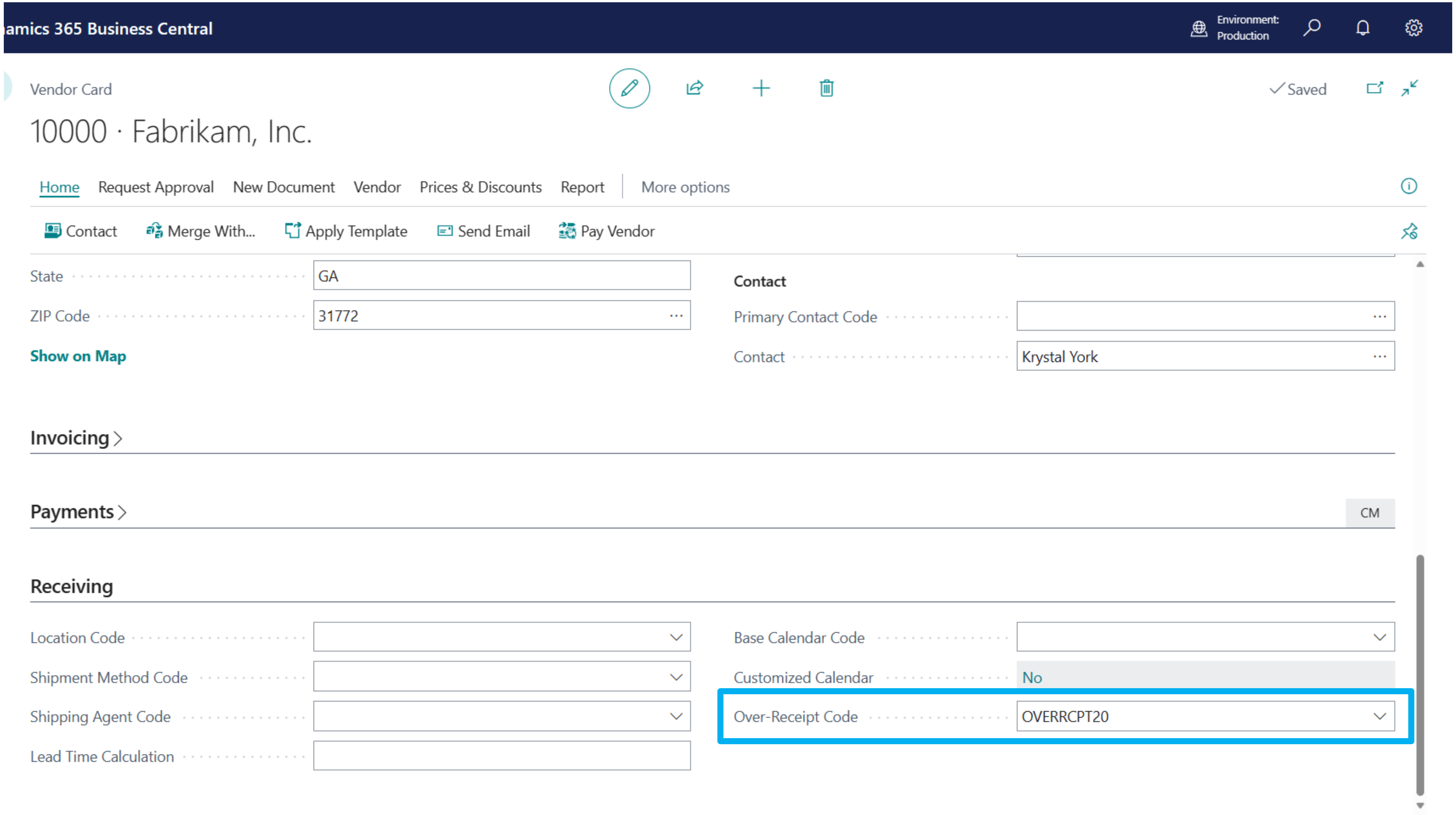

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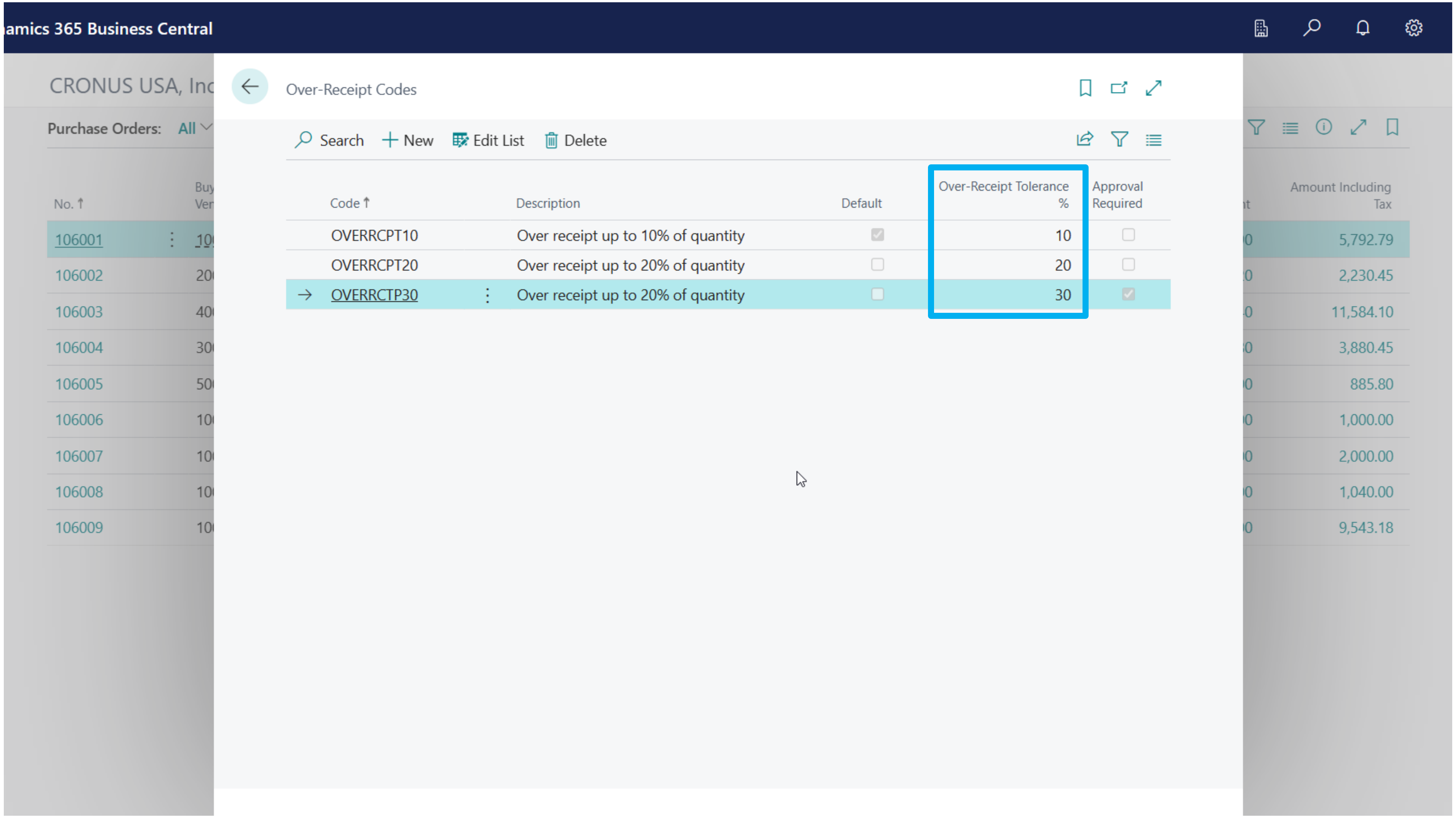

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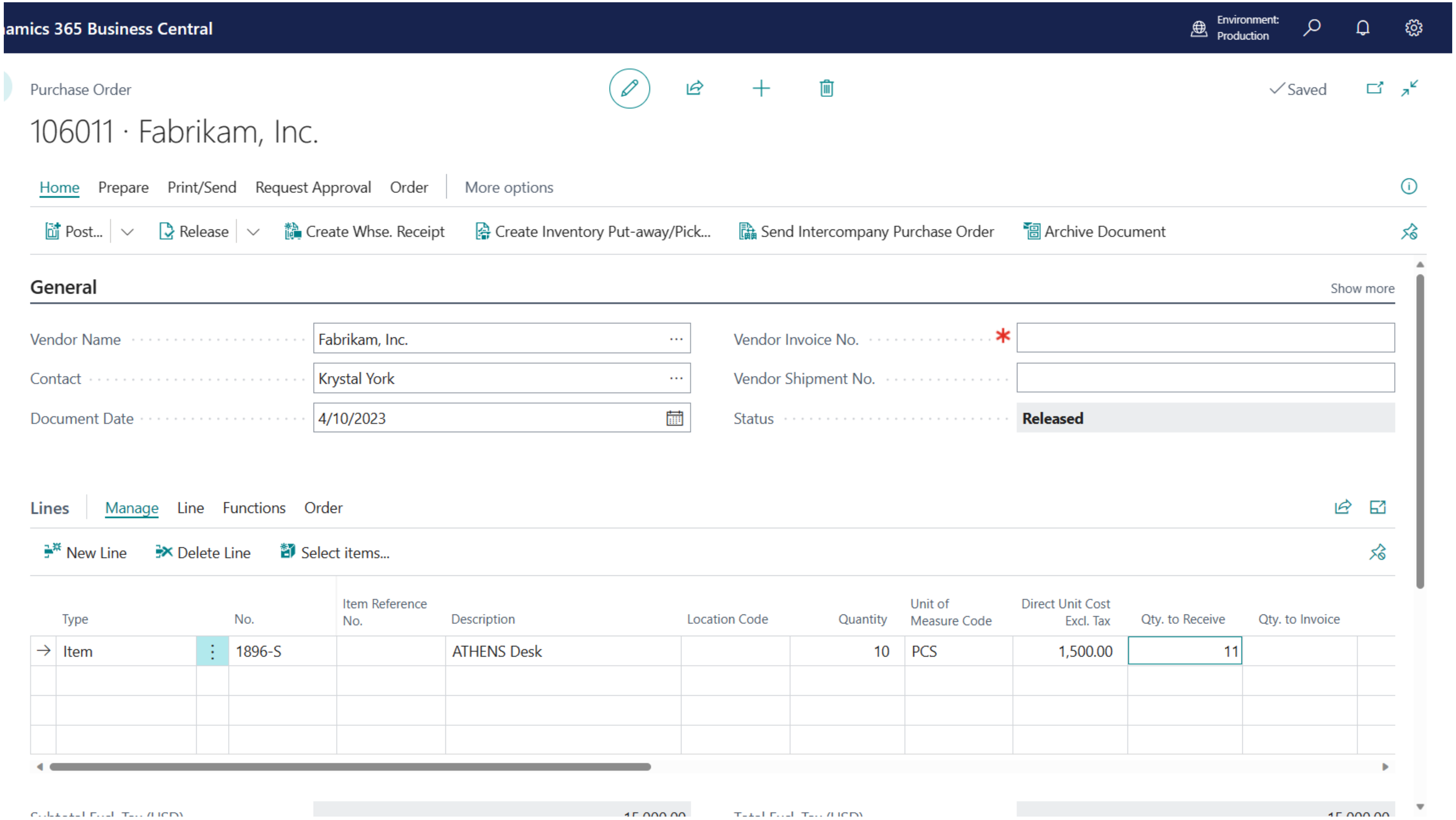

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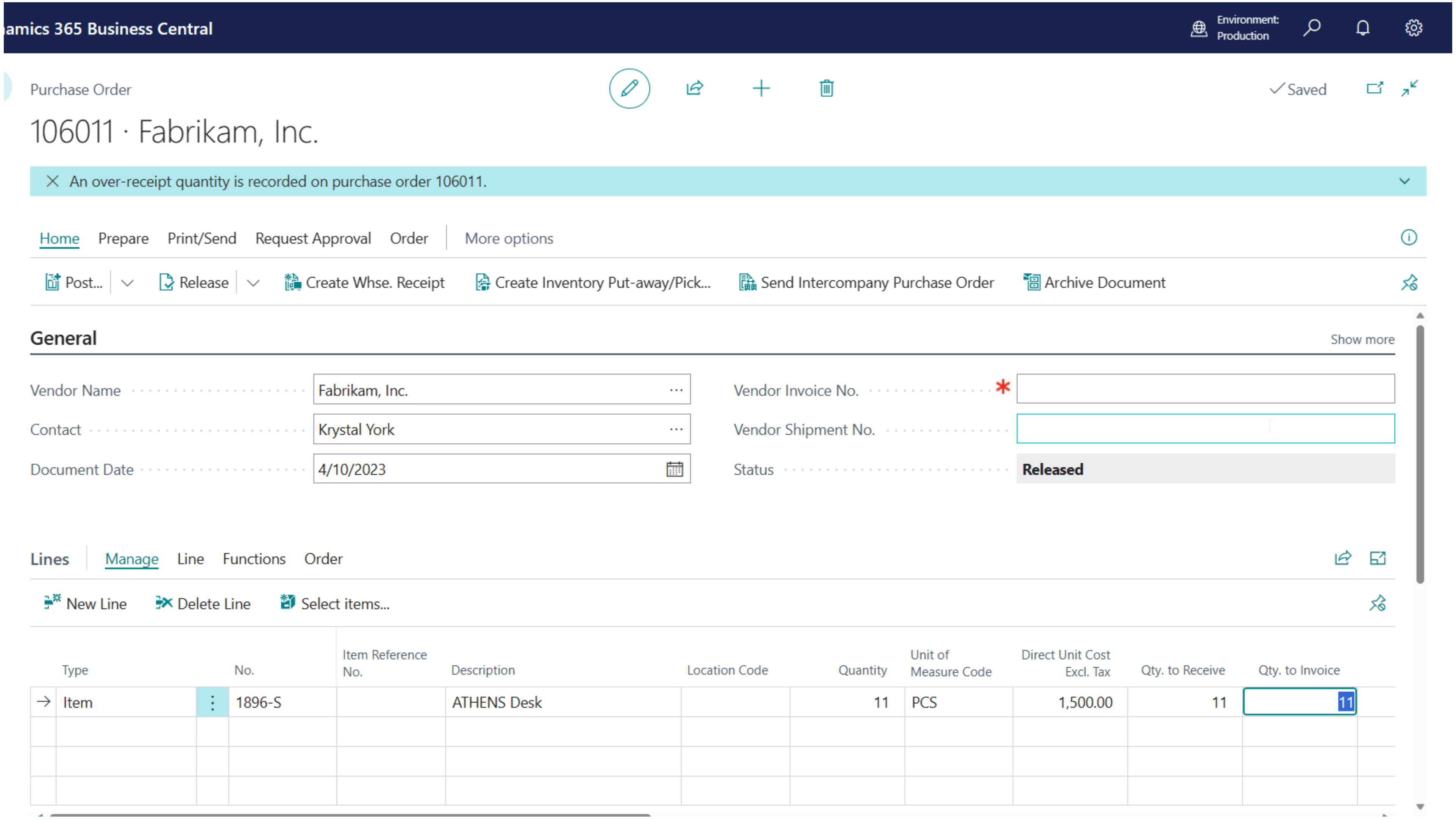

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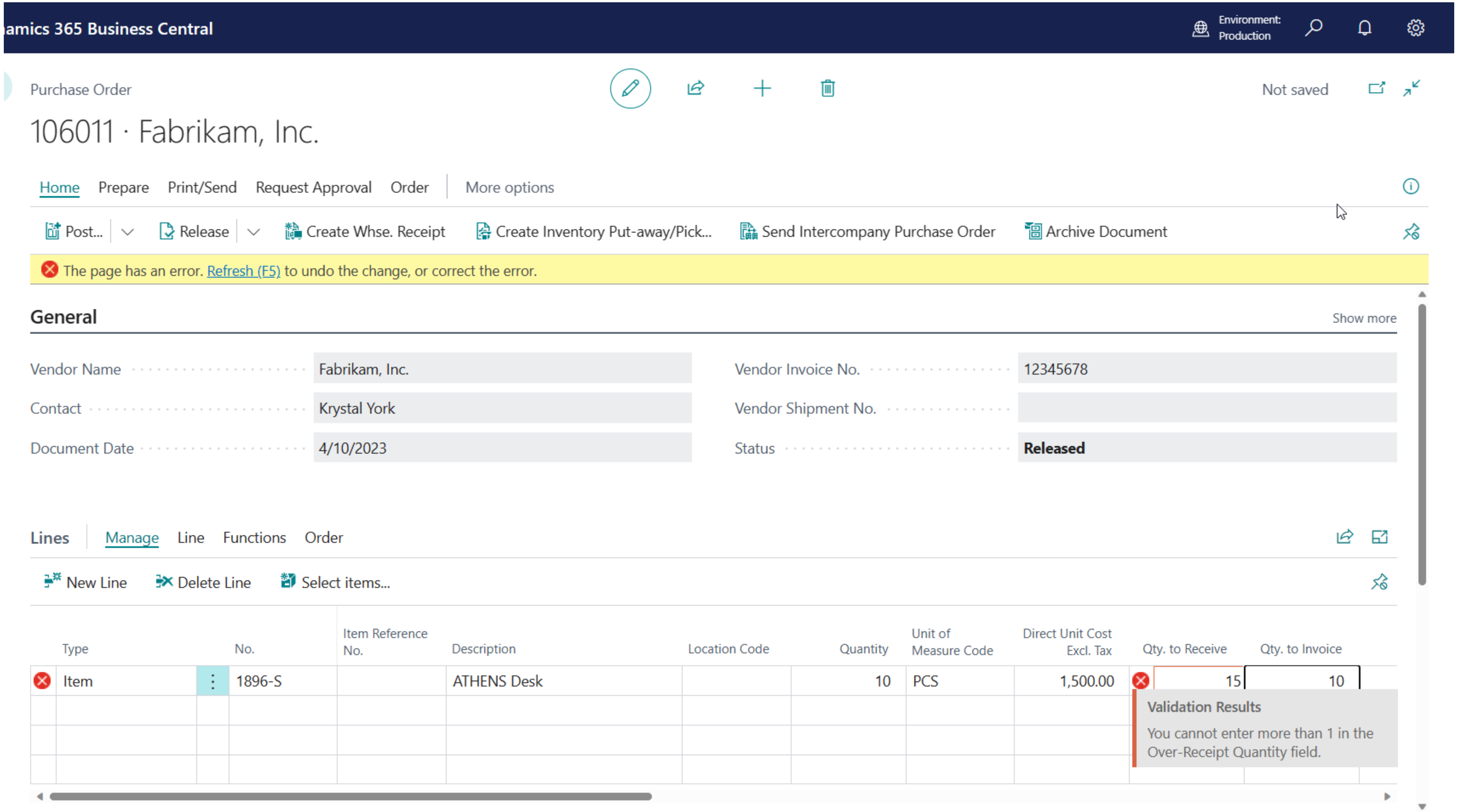

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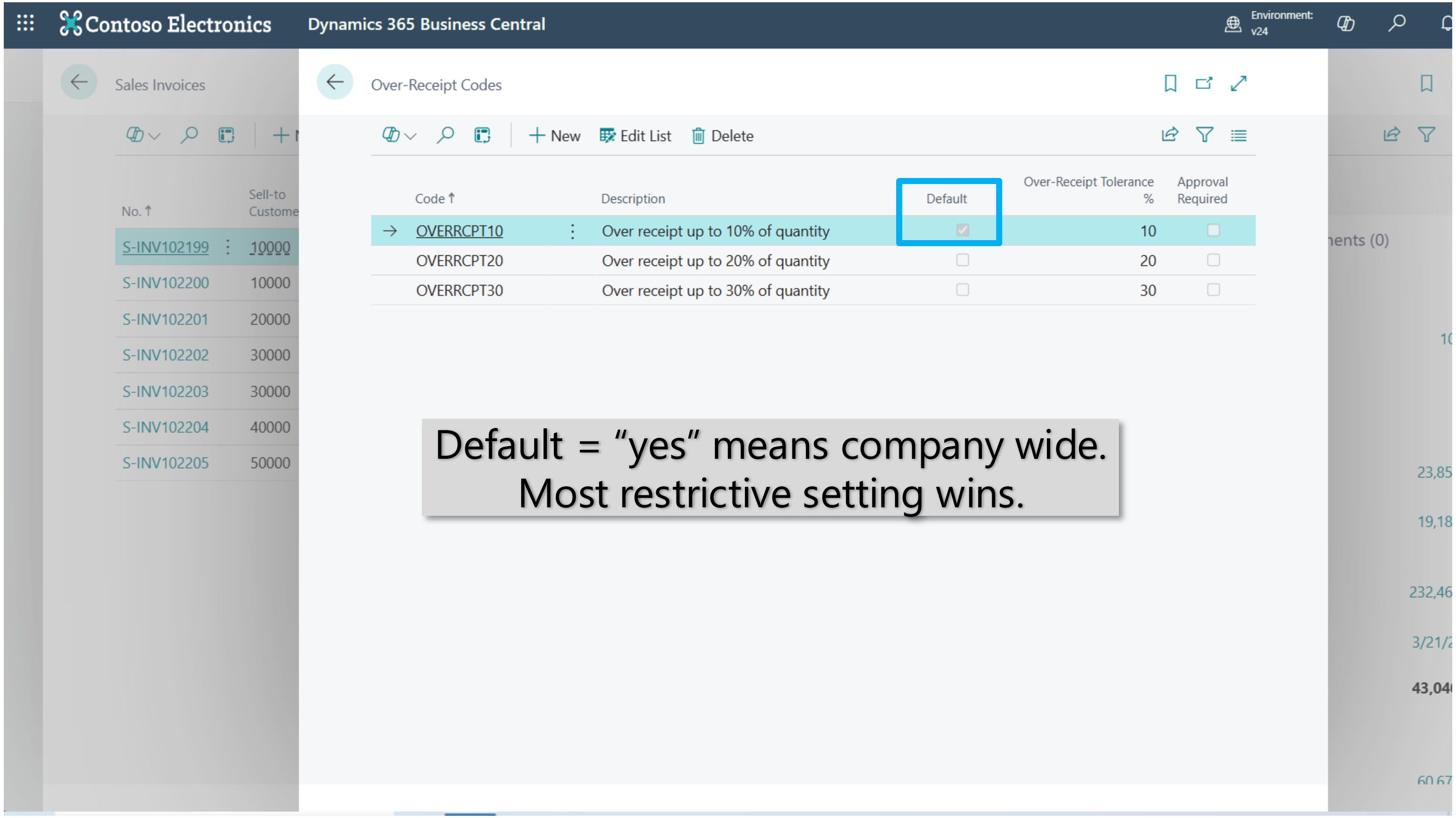
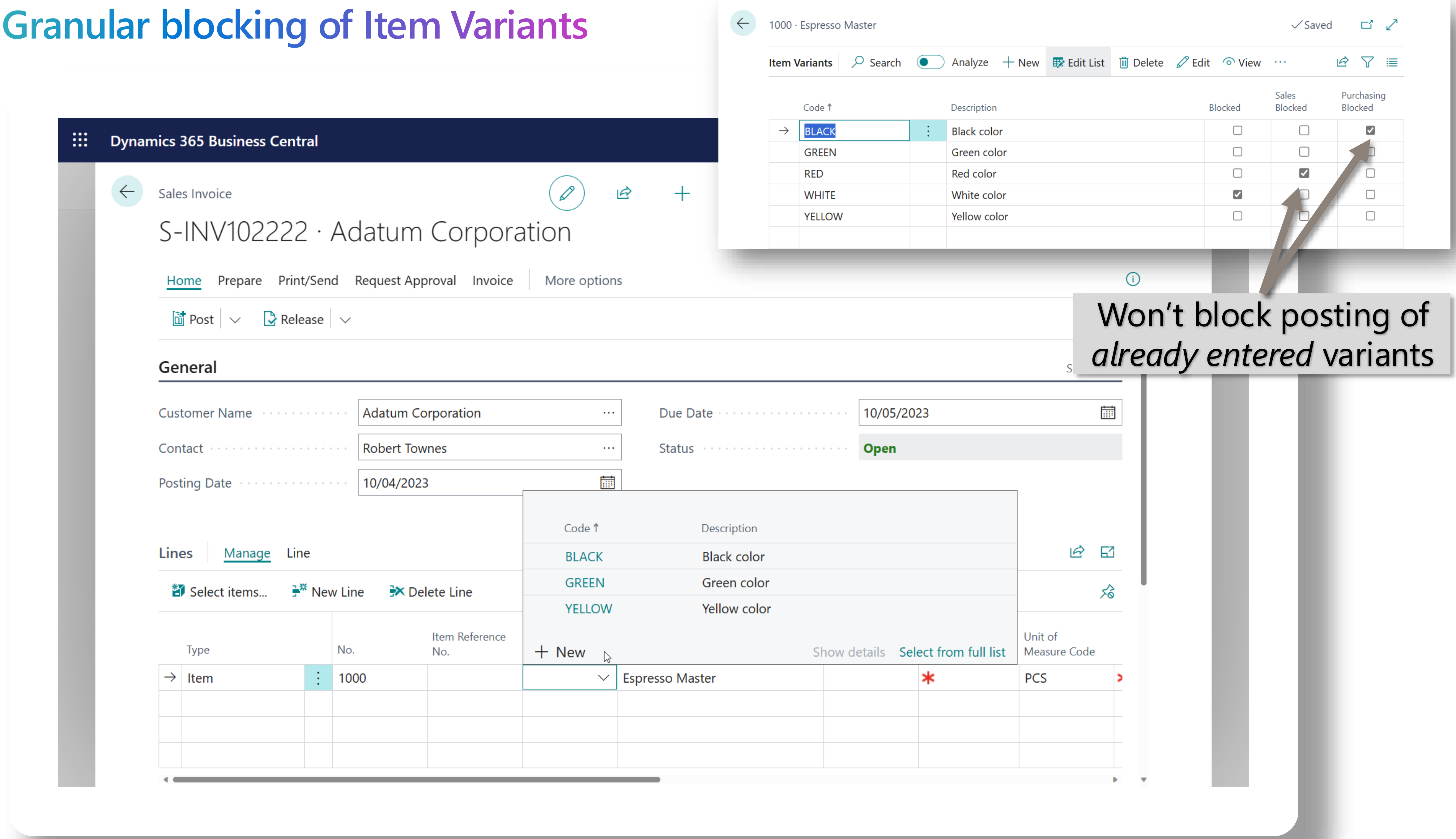


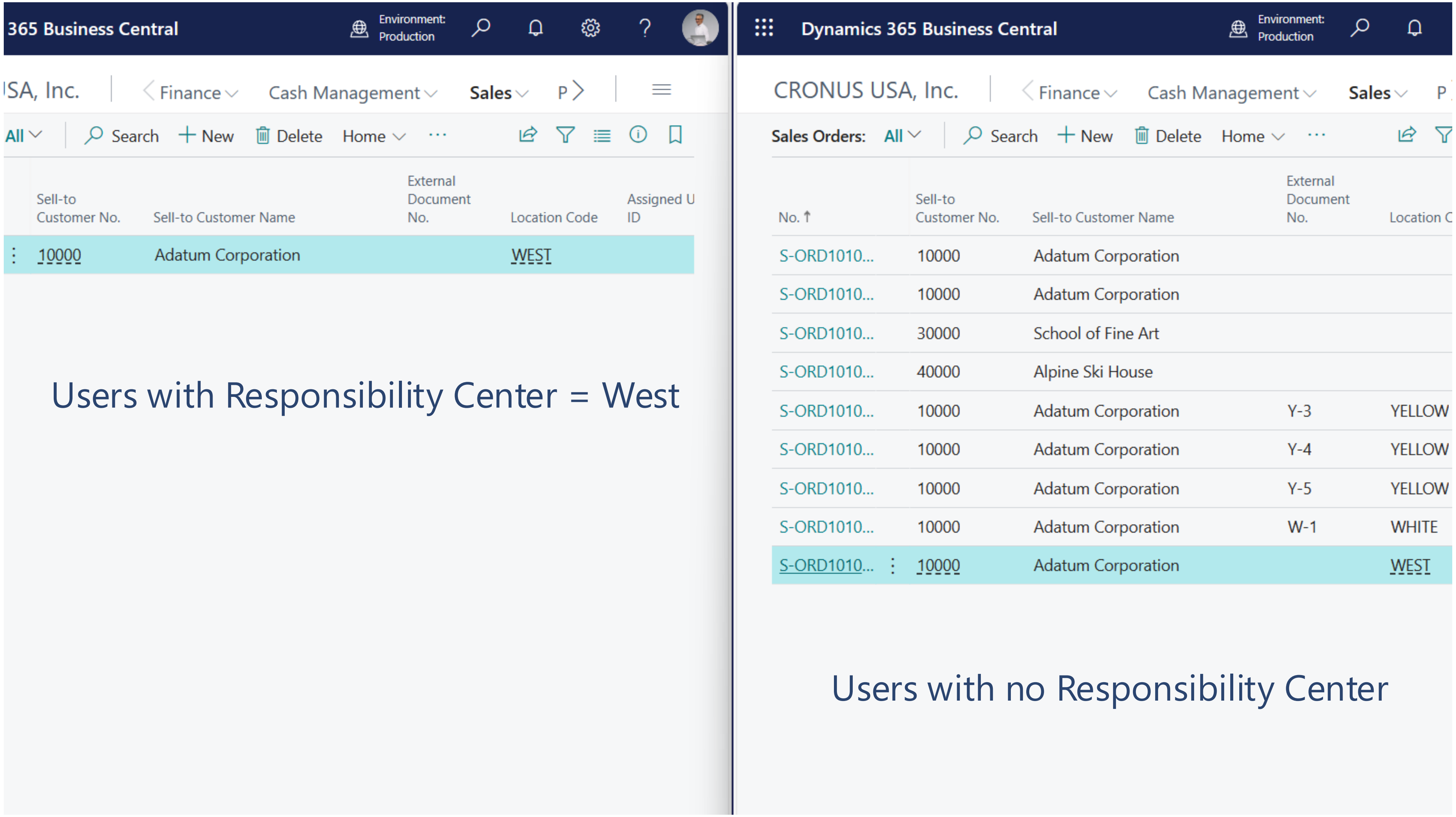
Tip # 10

#10: Granular blocking of Item Variants



Tip # 11

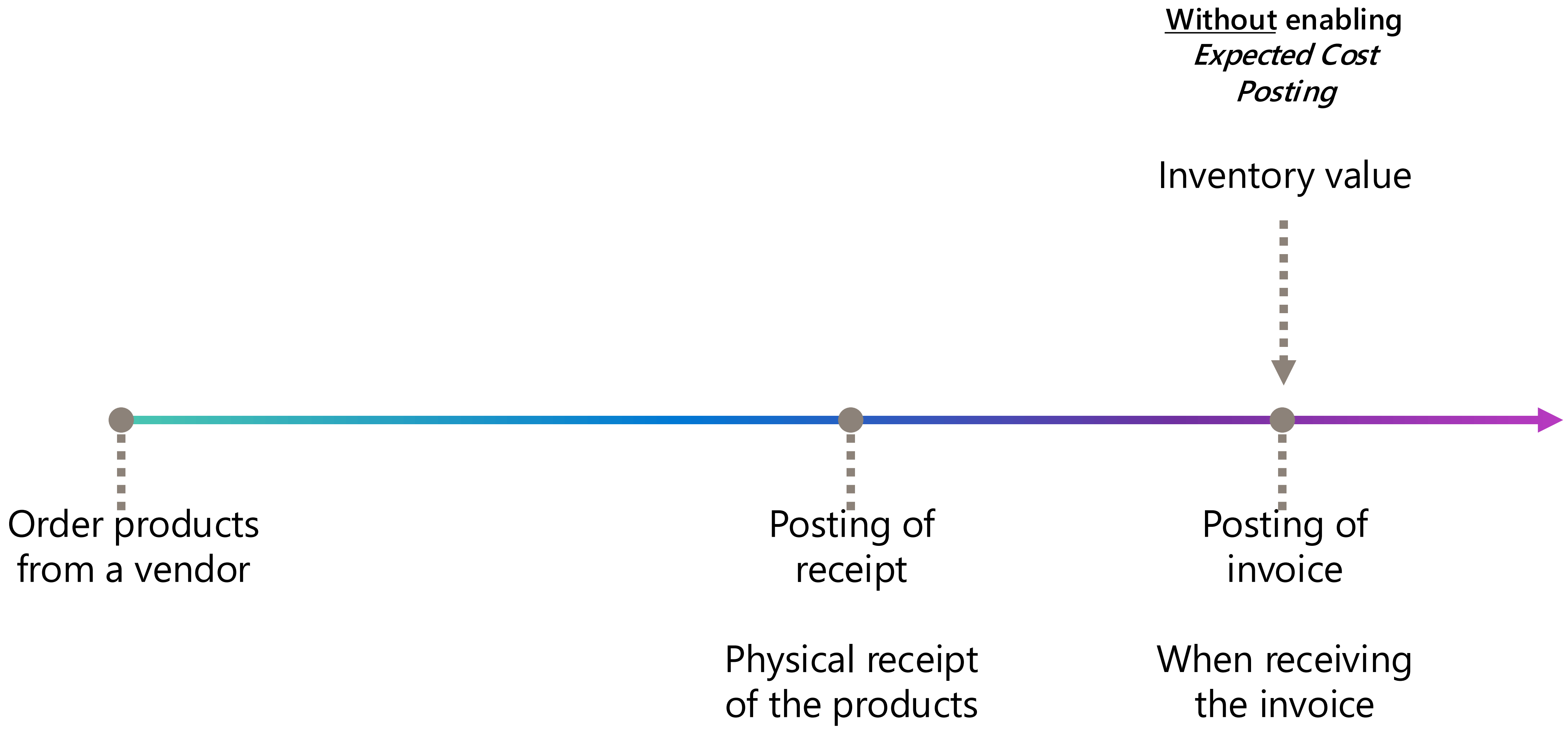
#11: Use responsibilities to segregate activities, data and locations



Tip # 12

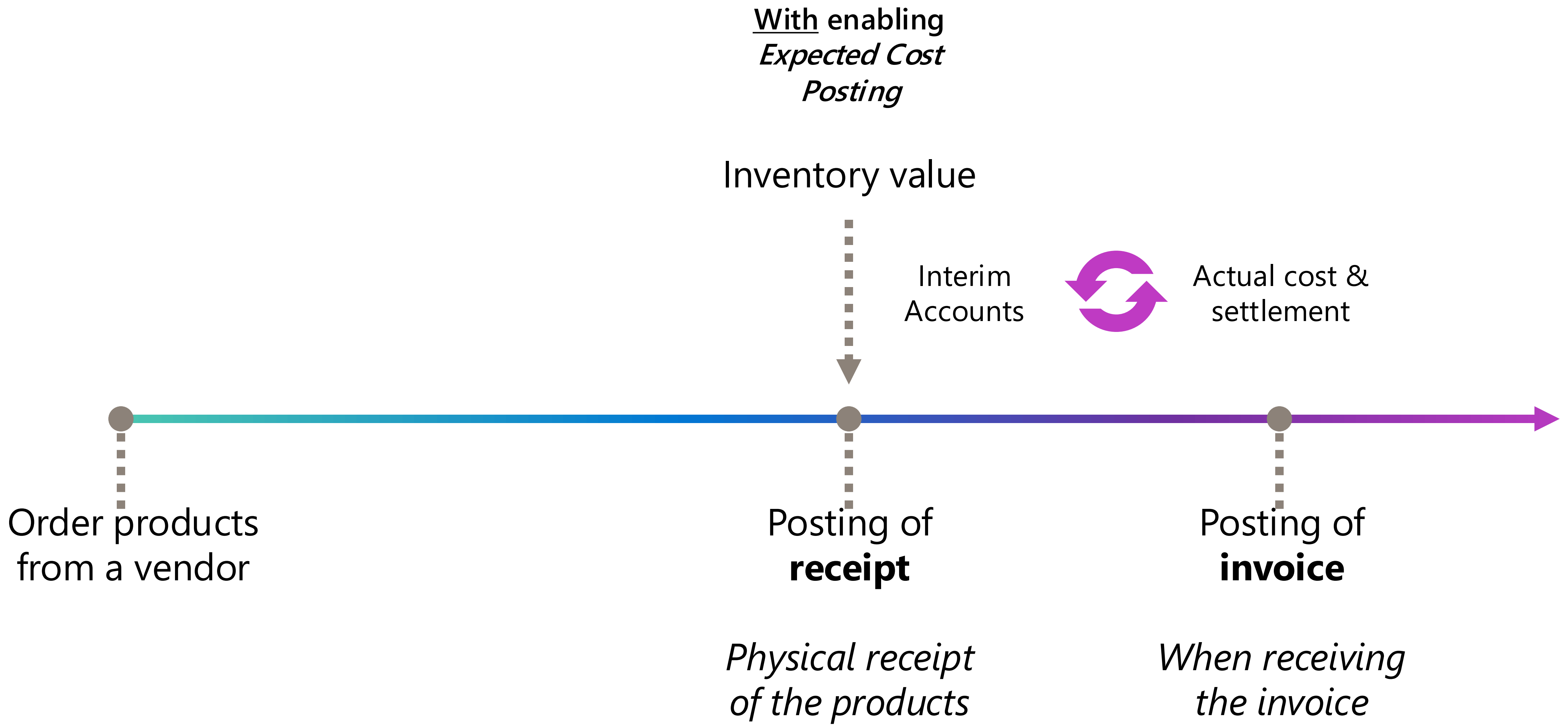
#12: Need inventory value in near-real-time?

Get closer to real-time with expected cost



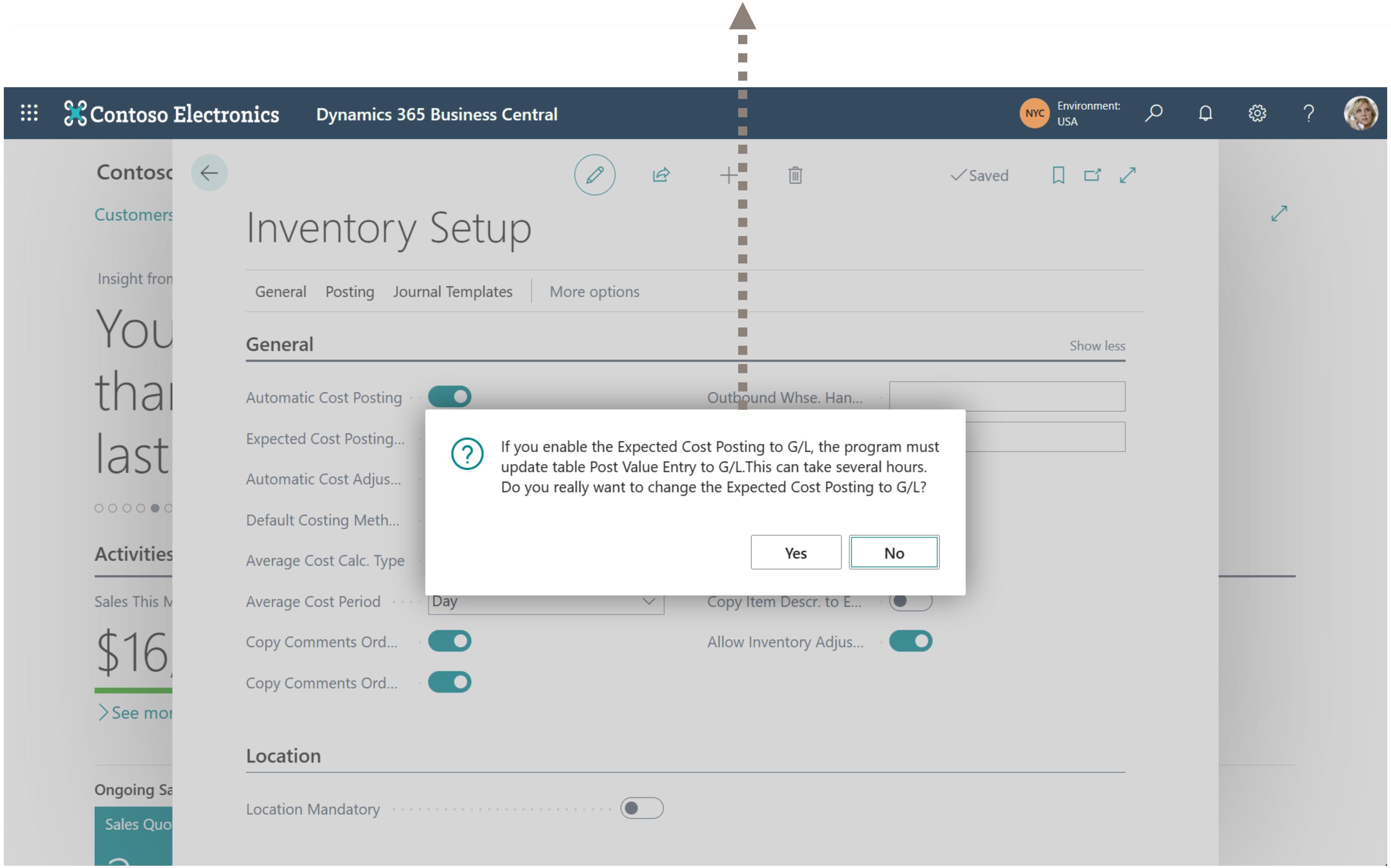
#12: Need inventory value in near-real-time?

Get closer to real-time with expected cost



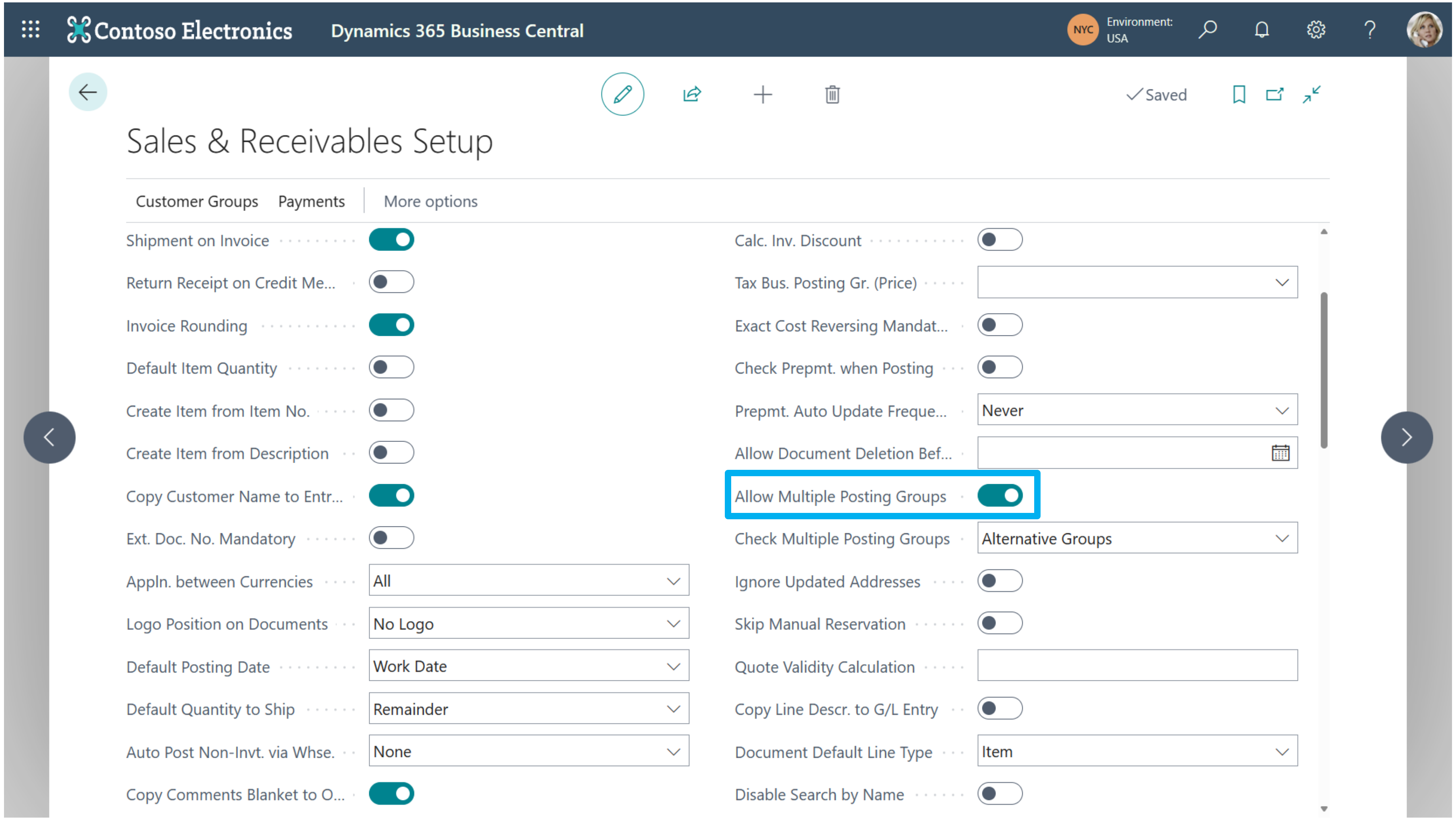
#12: Need inventory value in near-real-time?

Before you enable it, read the docs! Design Details: Expected Cost Posting



Tip # 13

#13: Substitute posting groups on-the-fly



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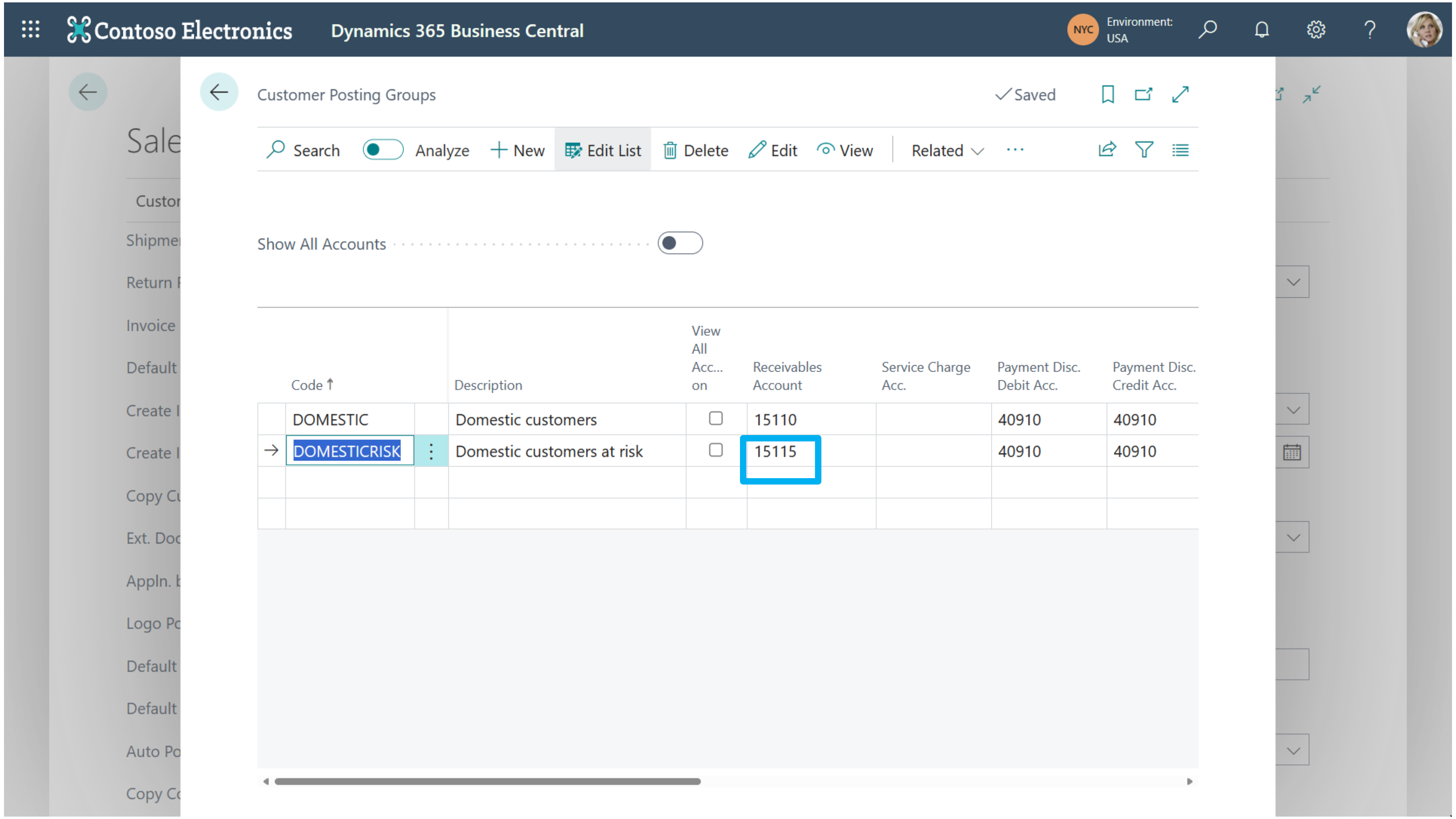

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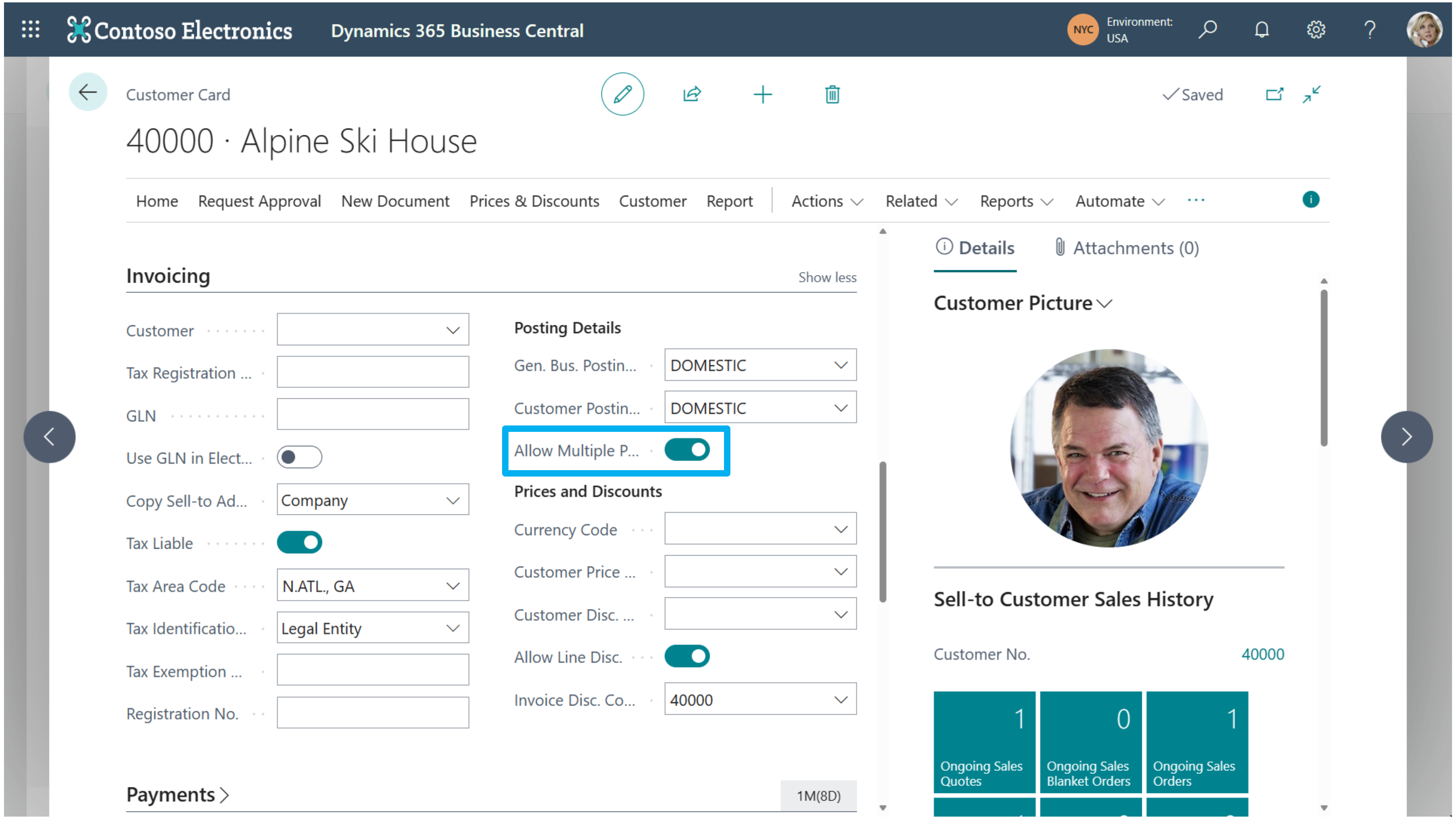

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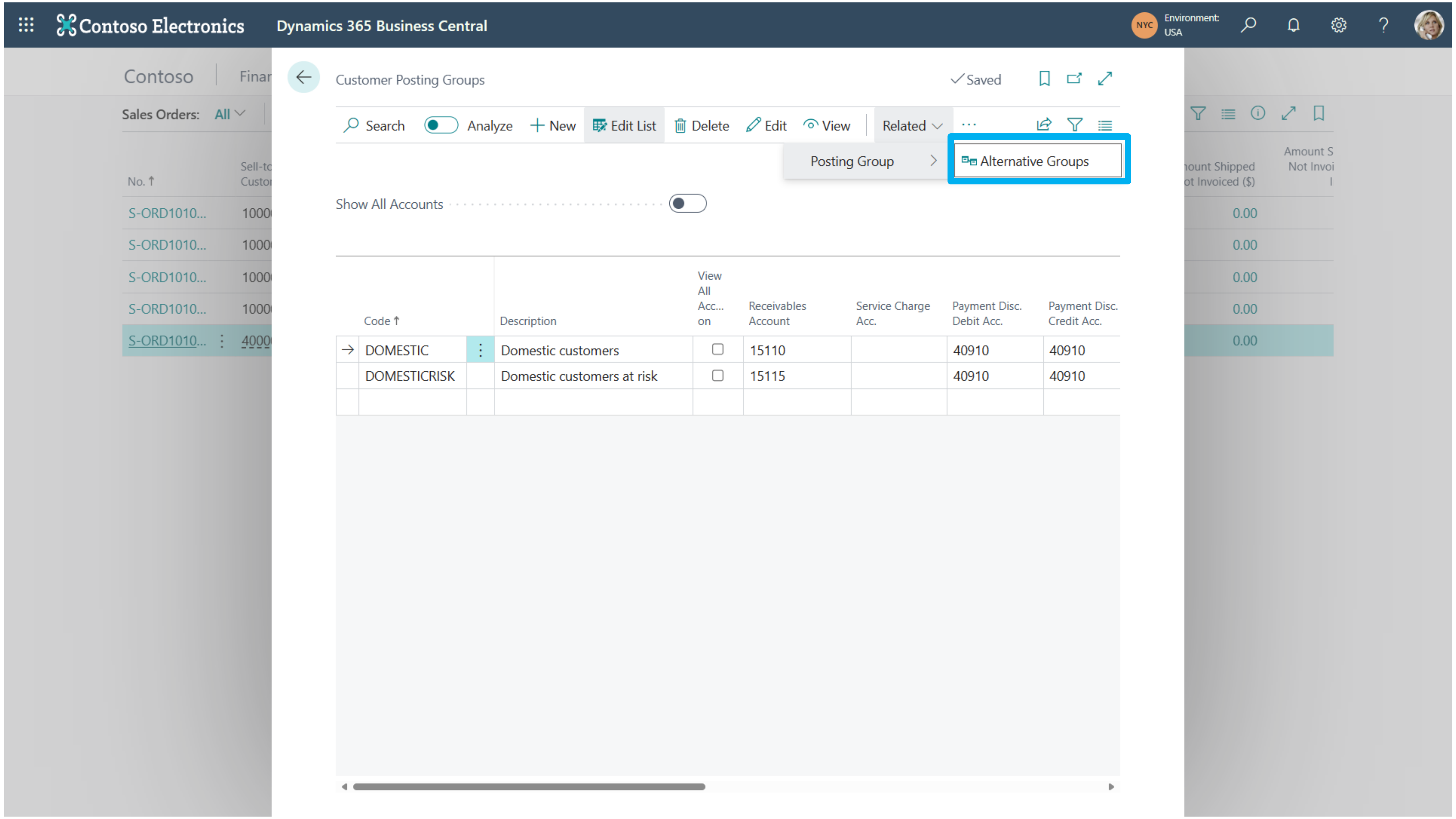

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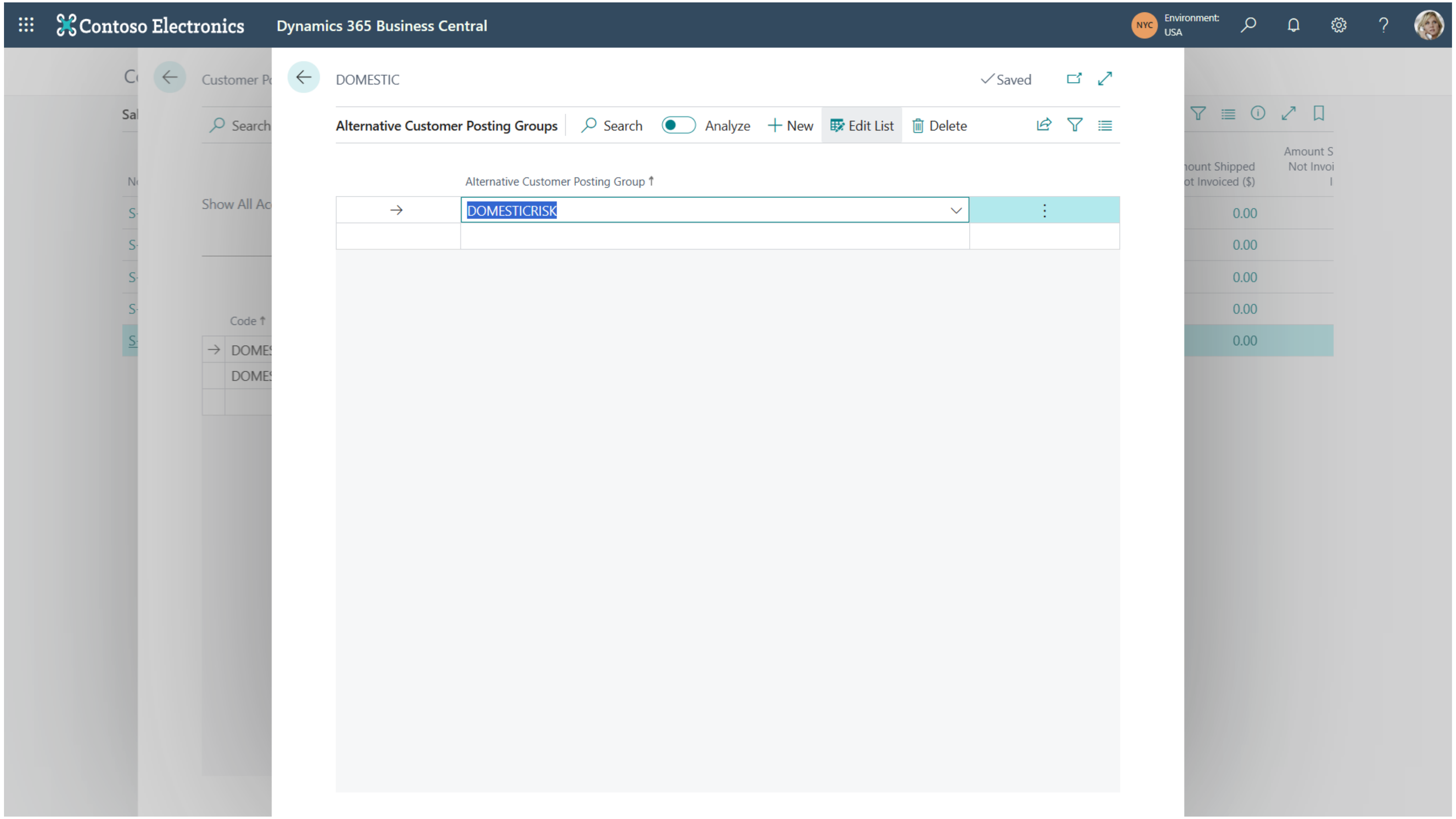

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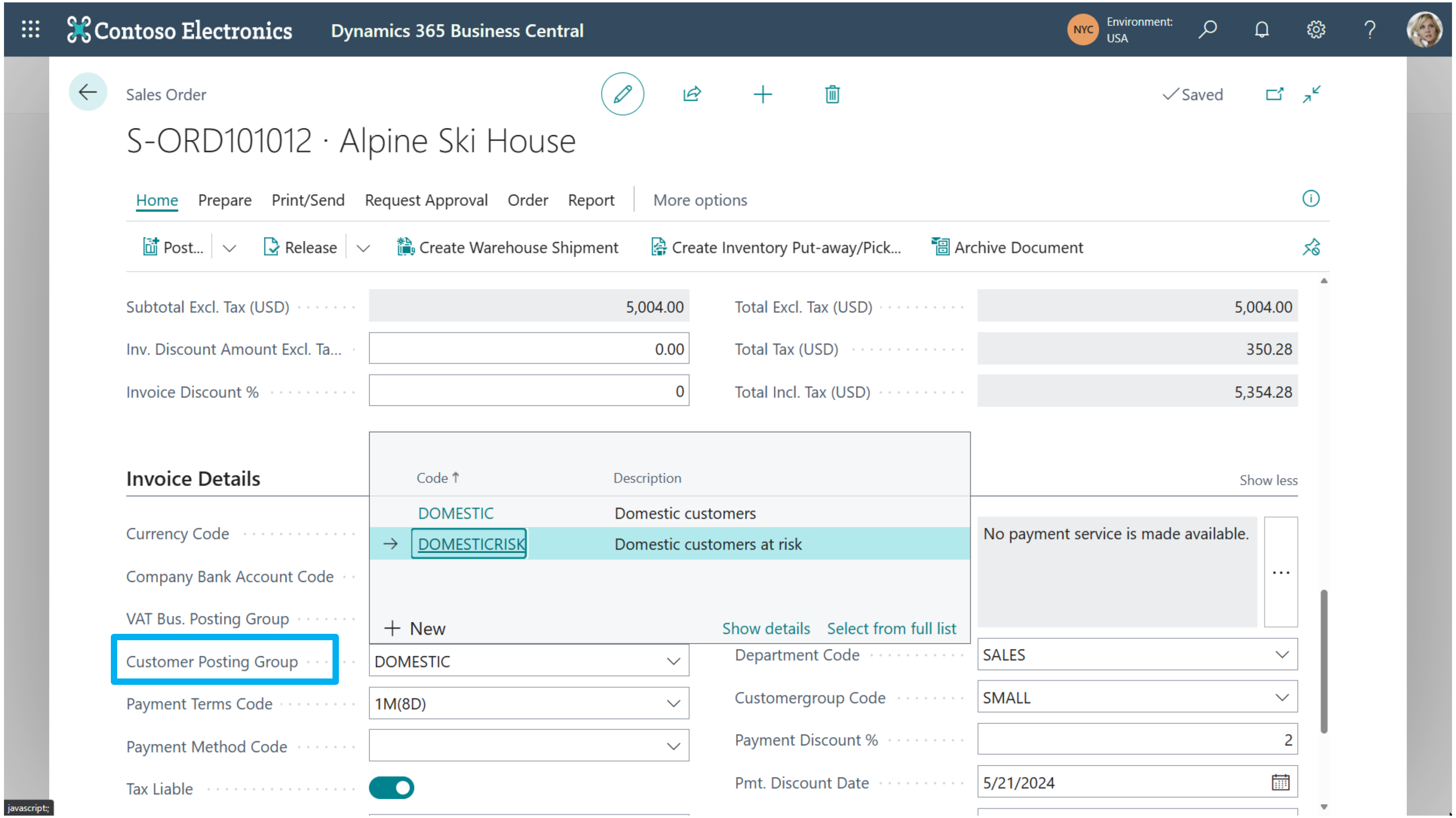

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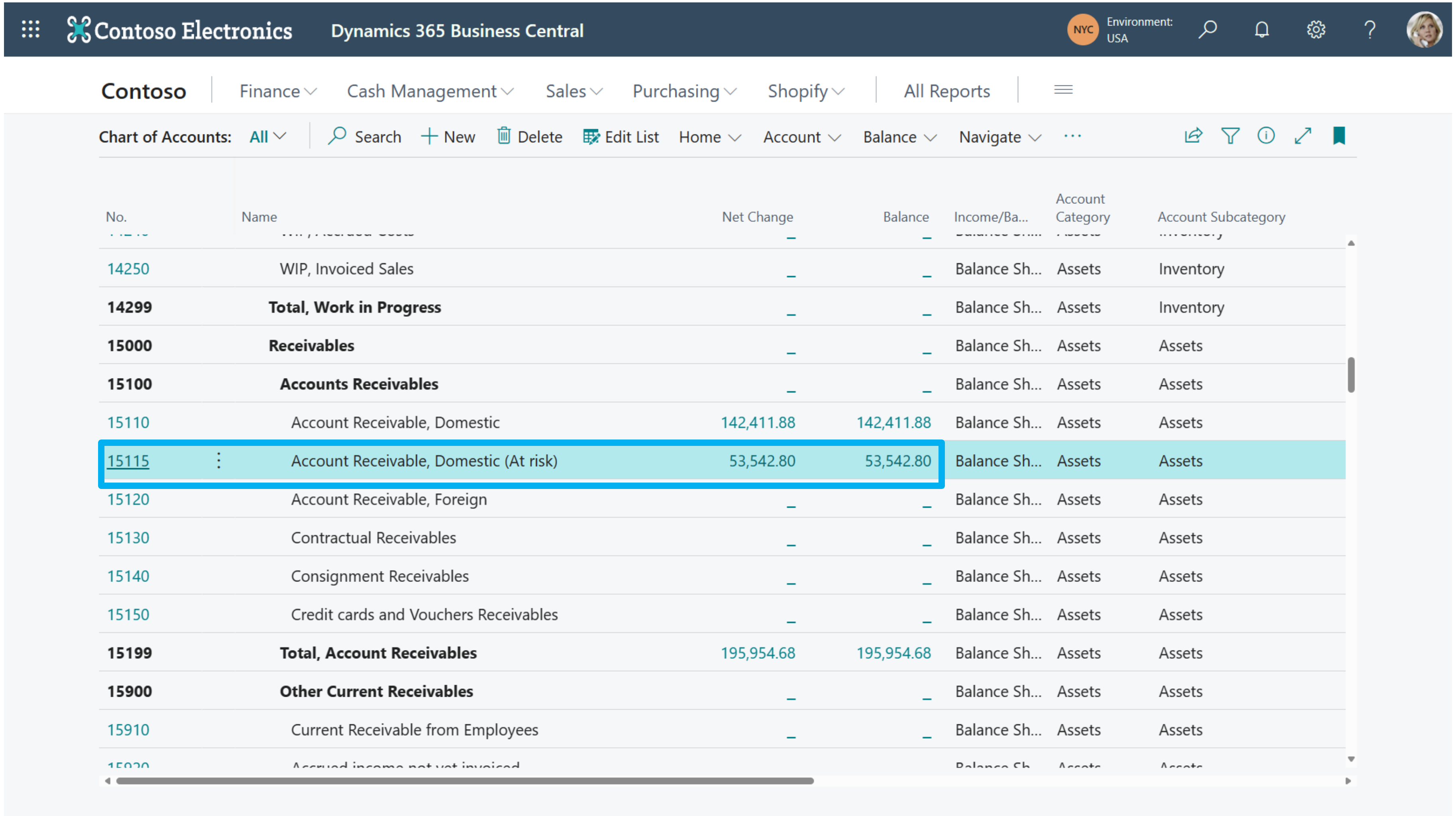
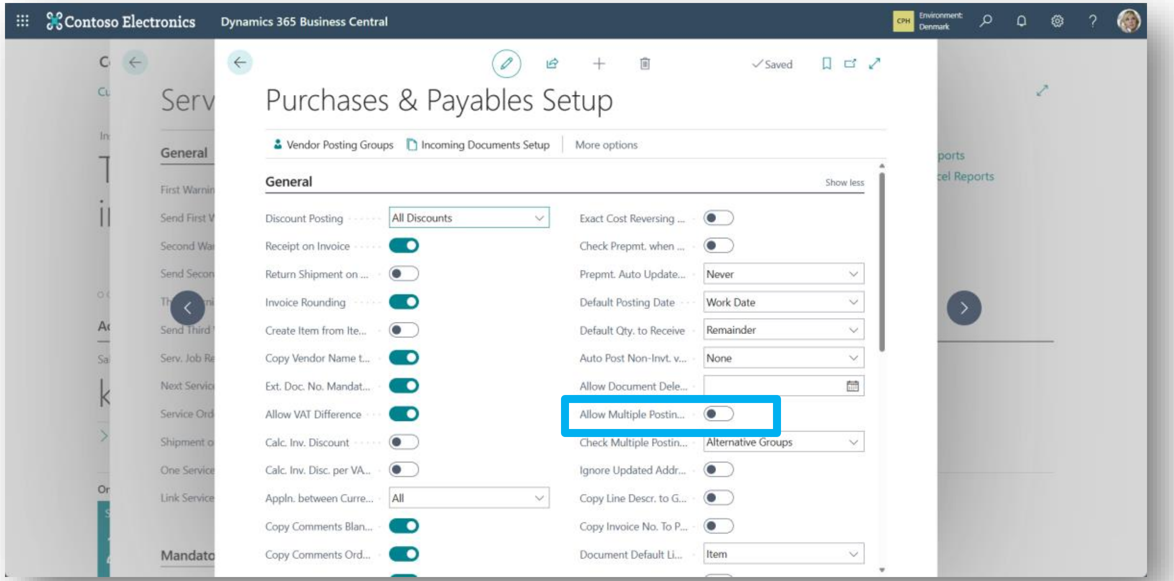
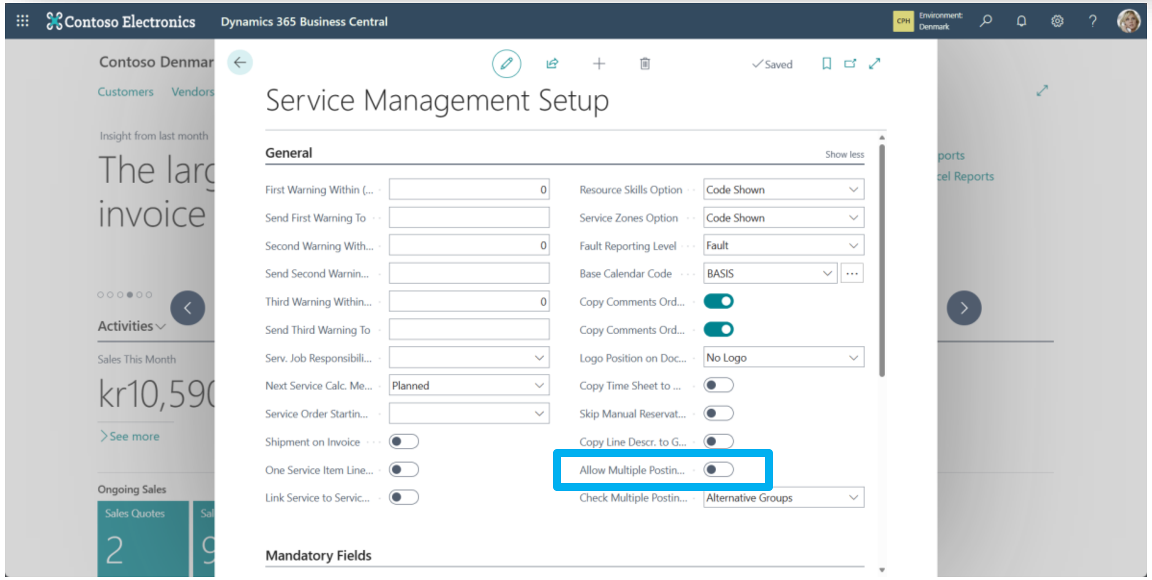


No.	Name	Net Change	Balance	Income/Ba...	Account Category	Account Subcategory
14250	WIP, Invoiced Sales	_	_	Balance Sh...	Assets	Inventory
14299	**Total, Work in Progress**	_	_	Balance Sh...	Assets	Inventory
15000	**Receivables**	_	_	Balance Sh...	Assets	Assets
15100	**Accounts Receivables**	_	_	Balance 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

#13: Substitute posting groups on-the-fly

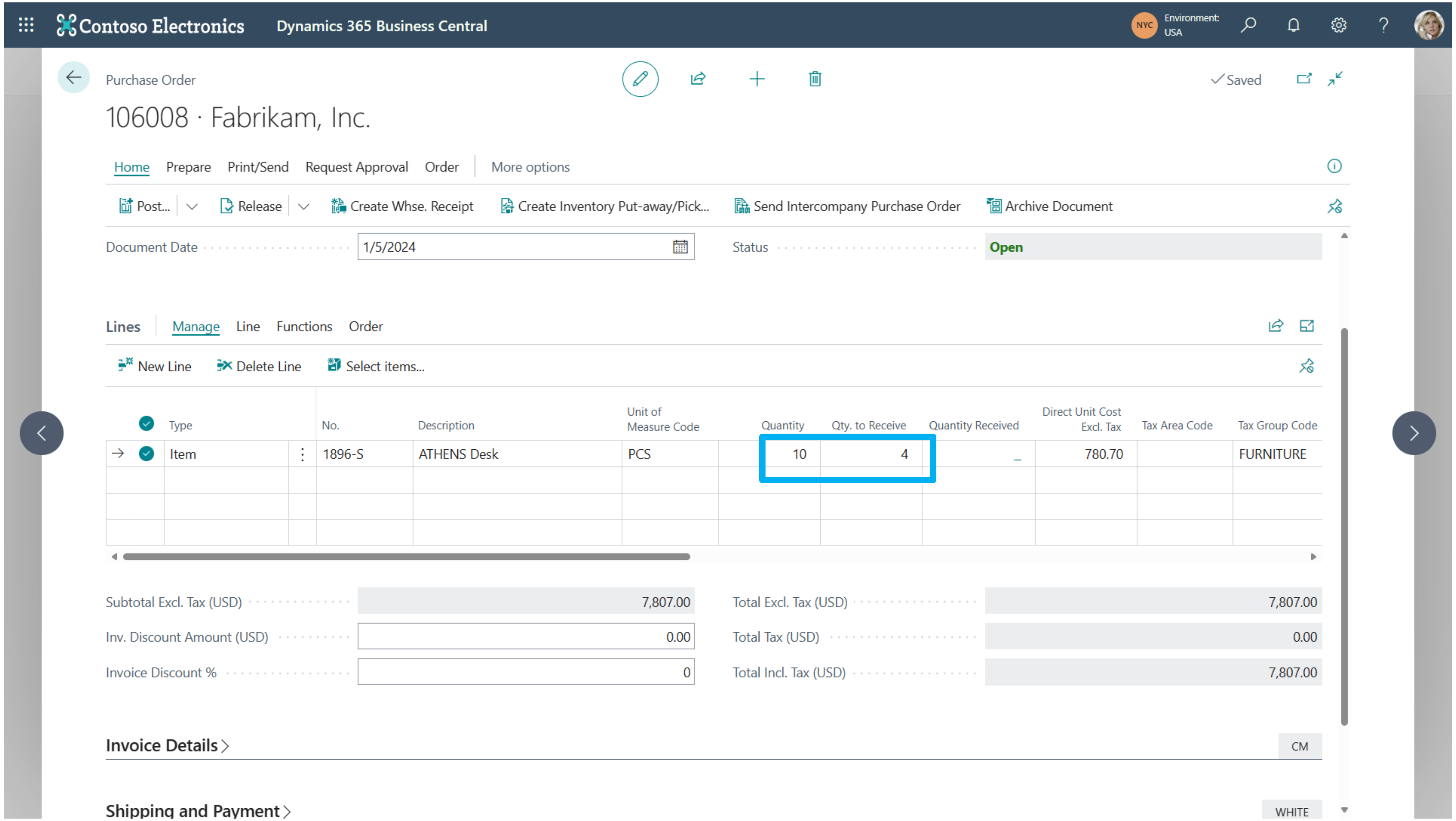
Also possible in
Purchase and Service



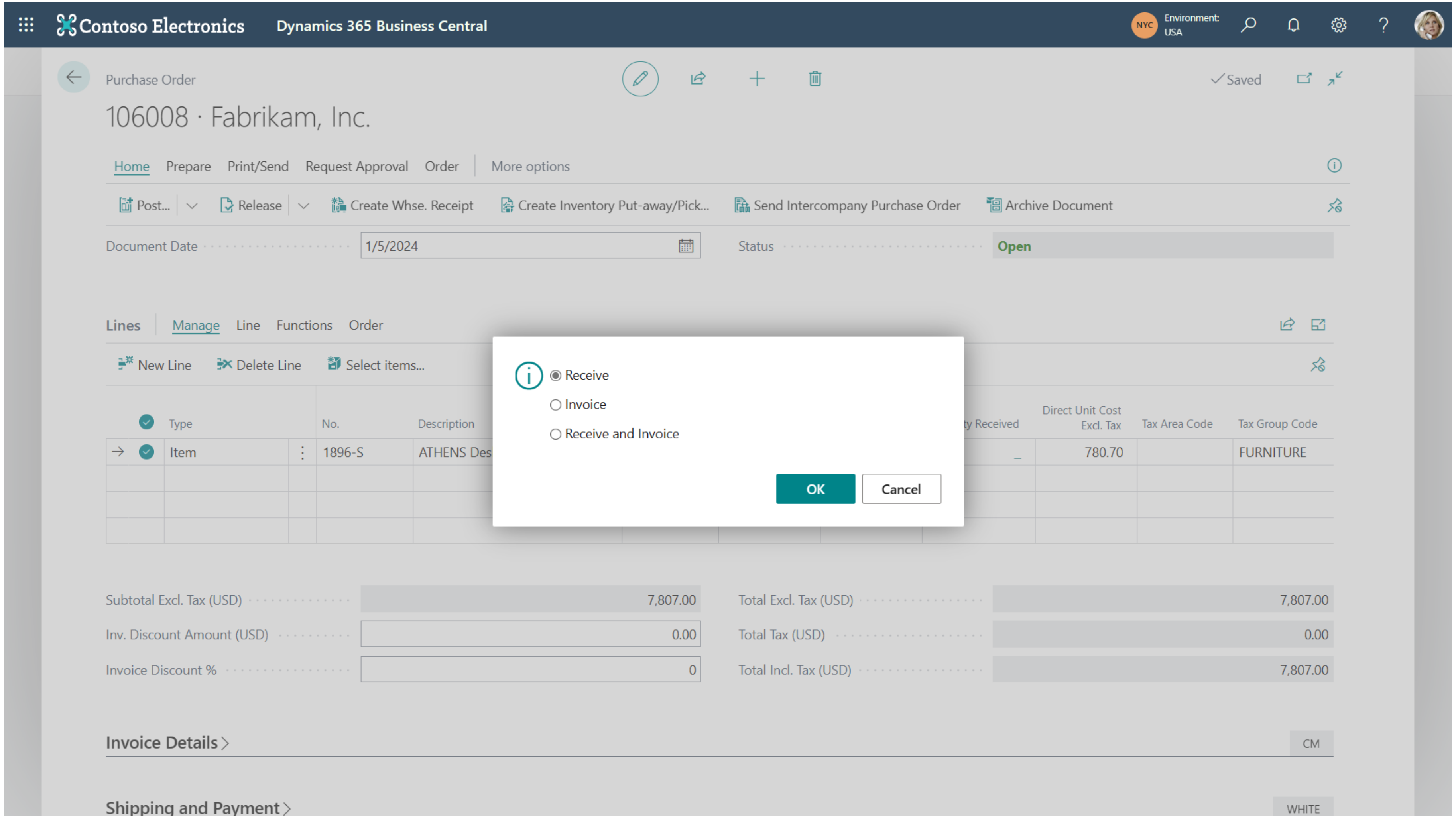


Tip # 14

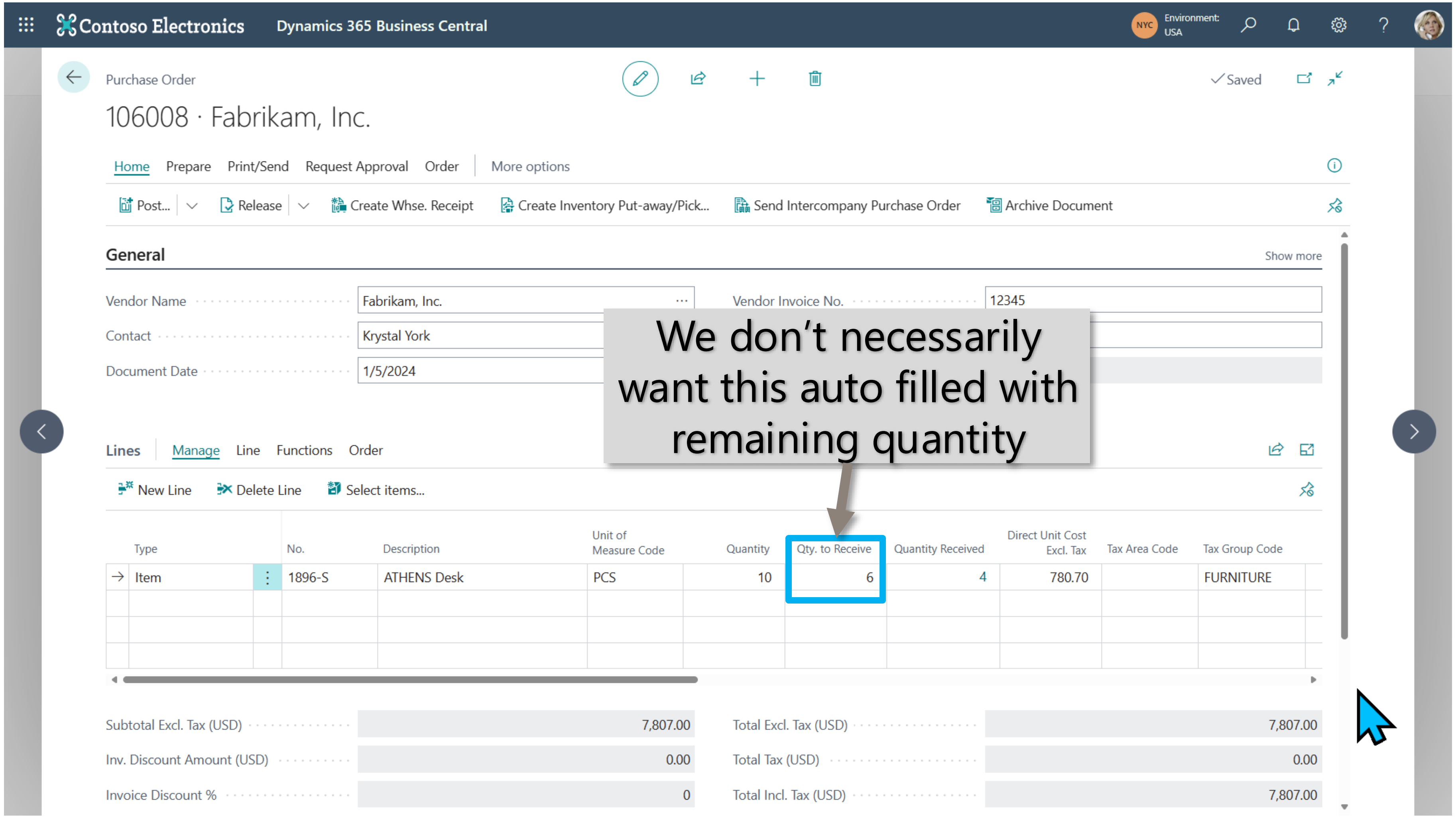
#14: Remainder Quantity on purchase orders



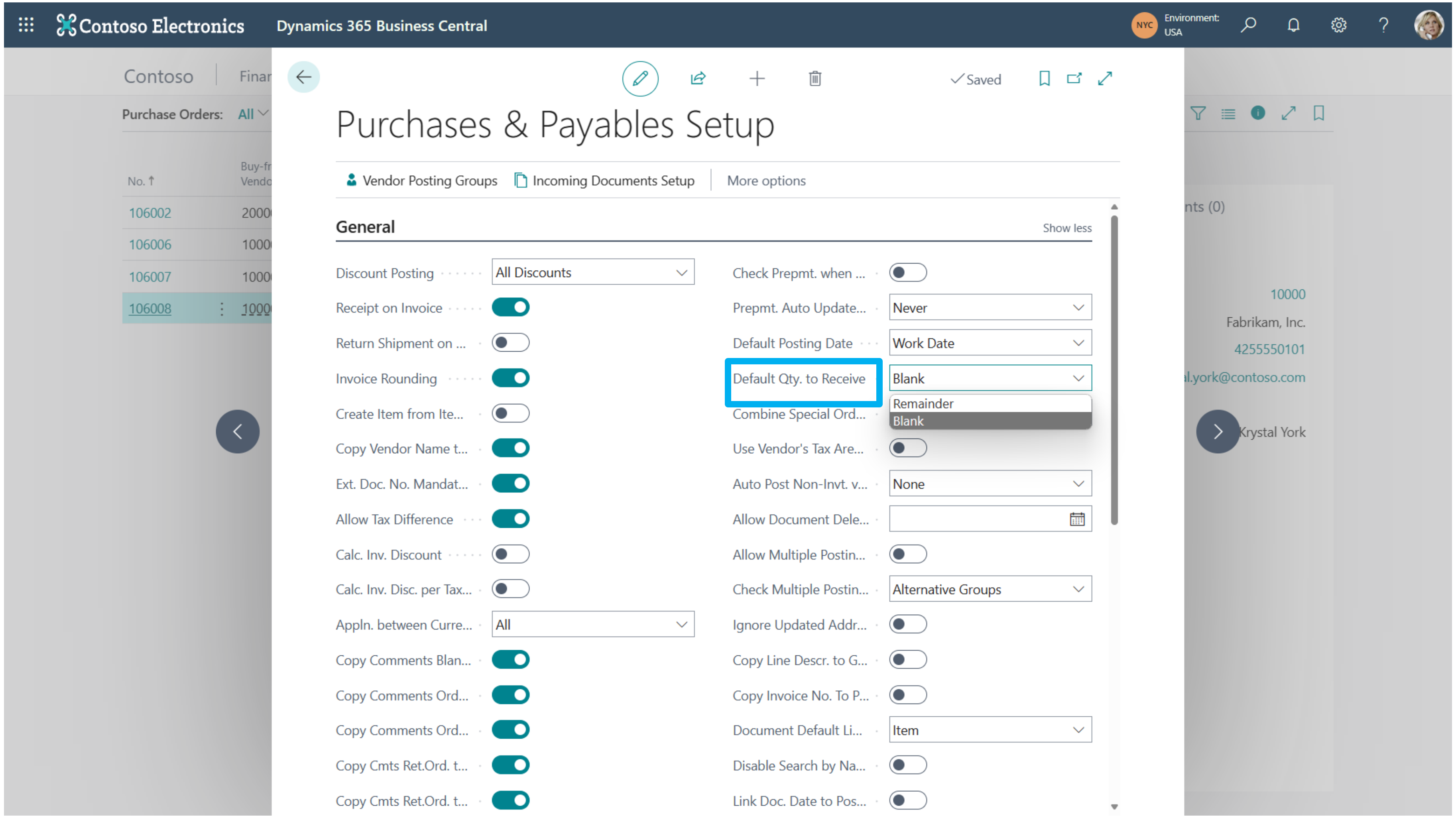
#14: Remainder Quantity on purchase orders



#14: Remainder Quantity on purchase orders

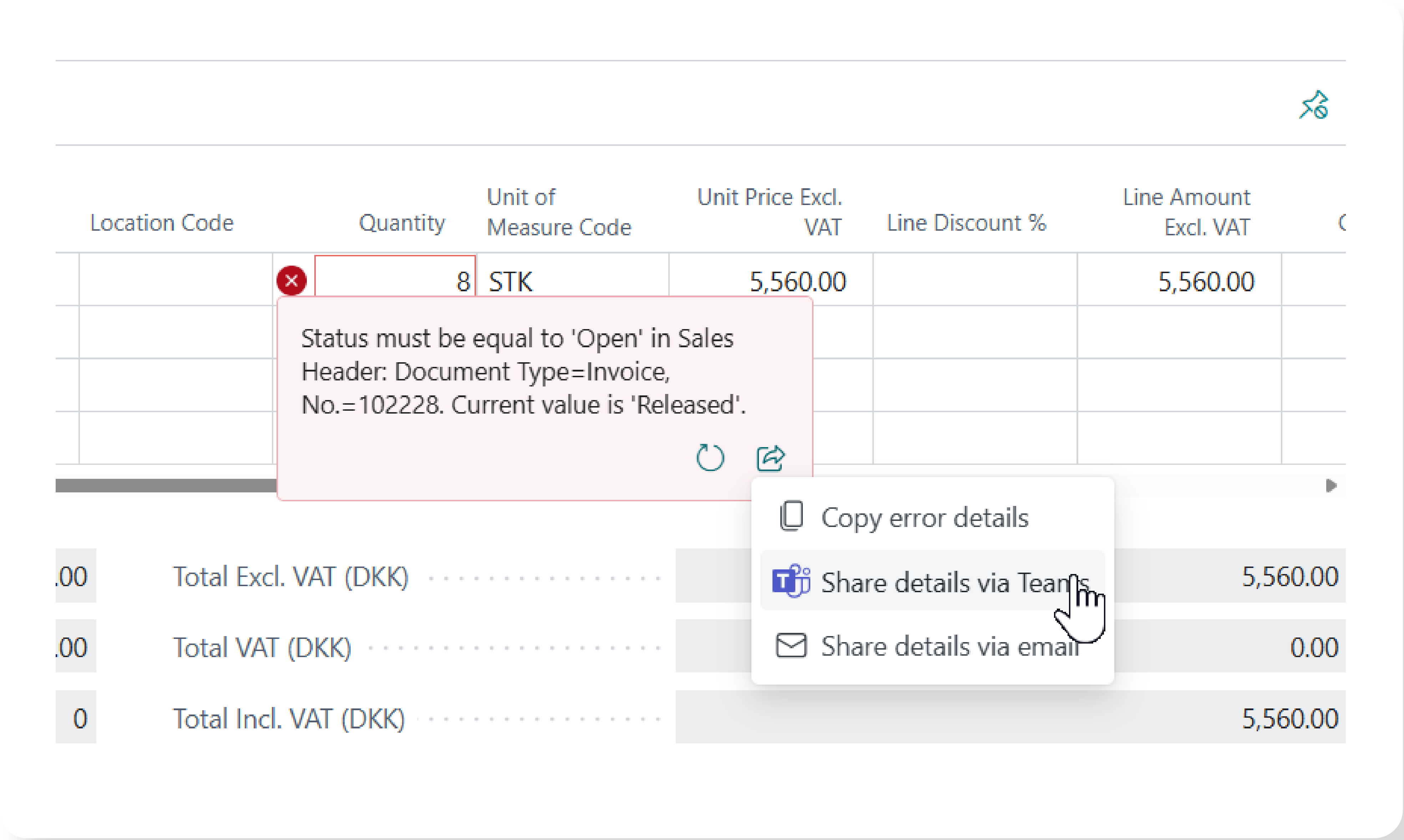


#14: Remainder Quantity on purchase orders

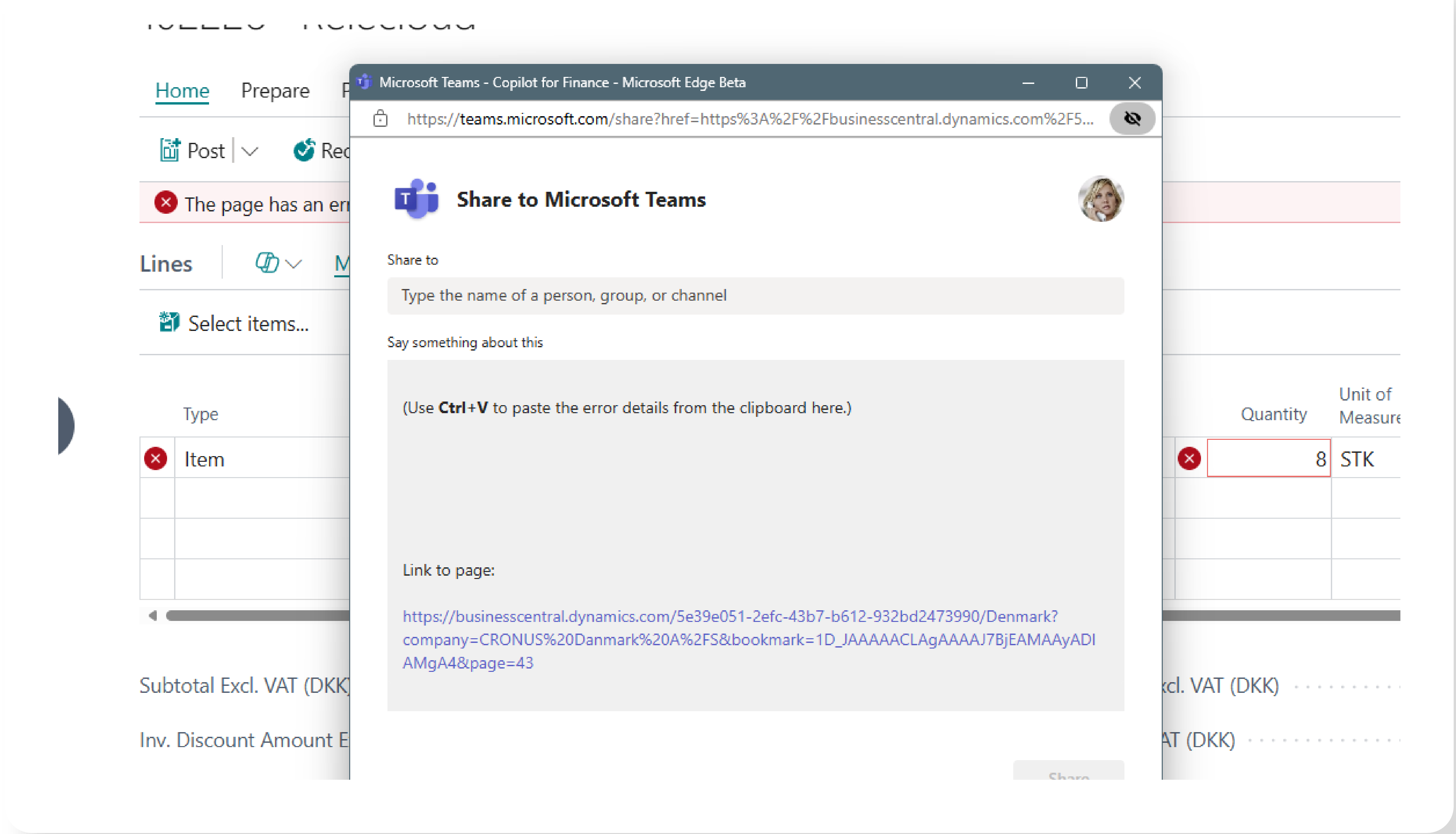


Tip # 15

#15: Get unblocked – Easily share error details



#15: Get unblocked – Easily share error details



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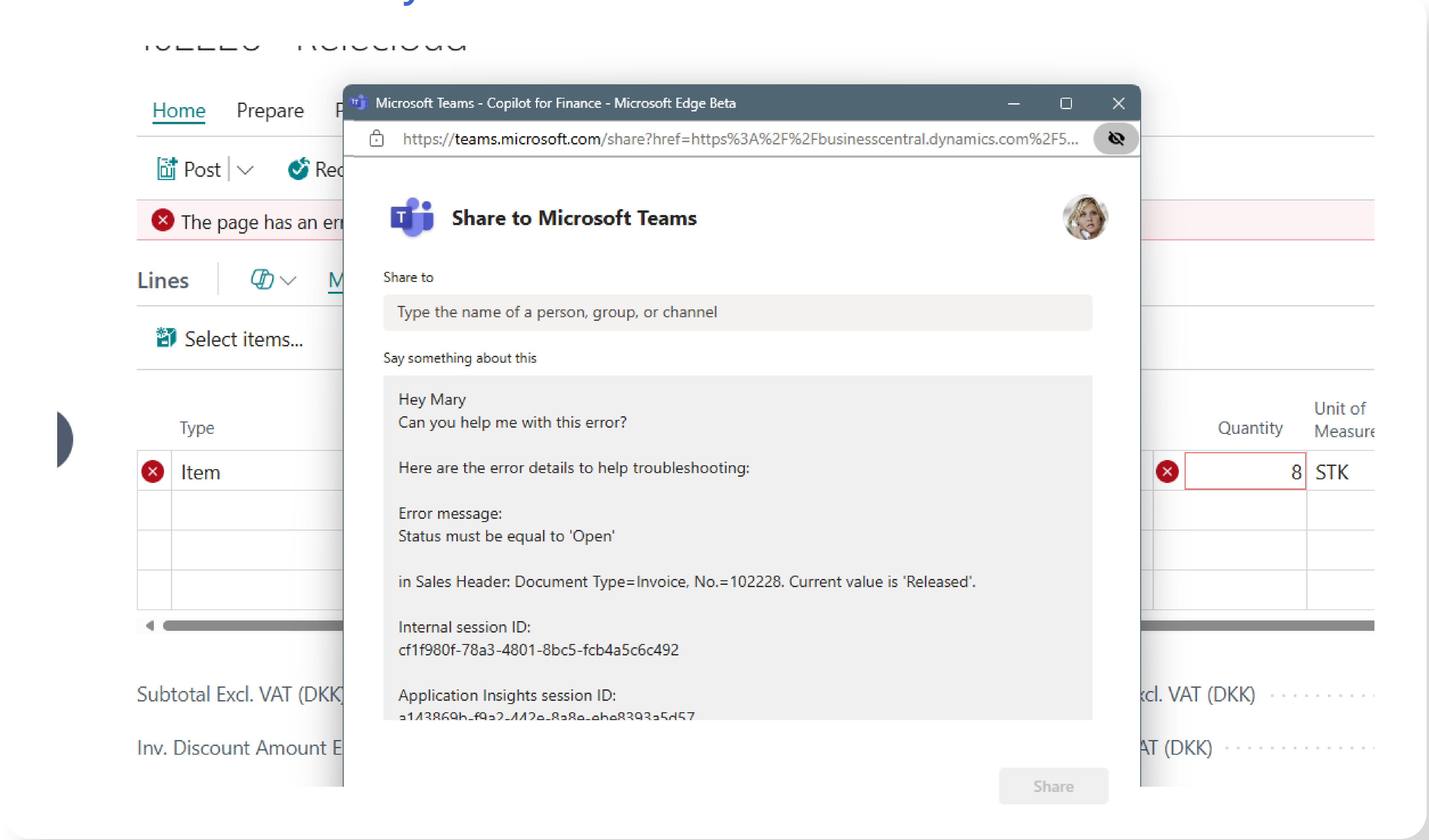
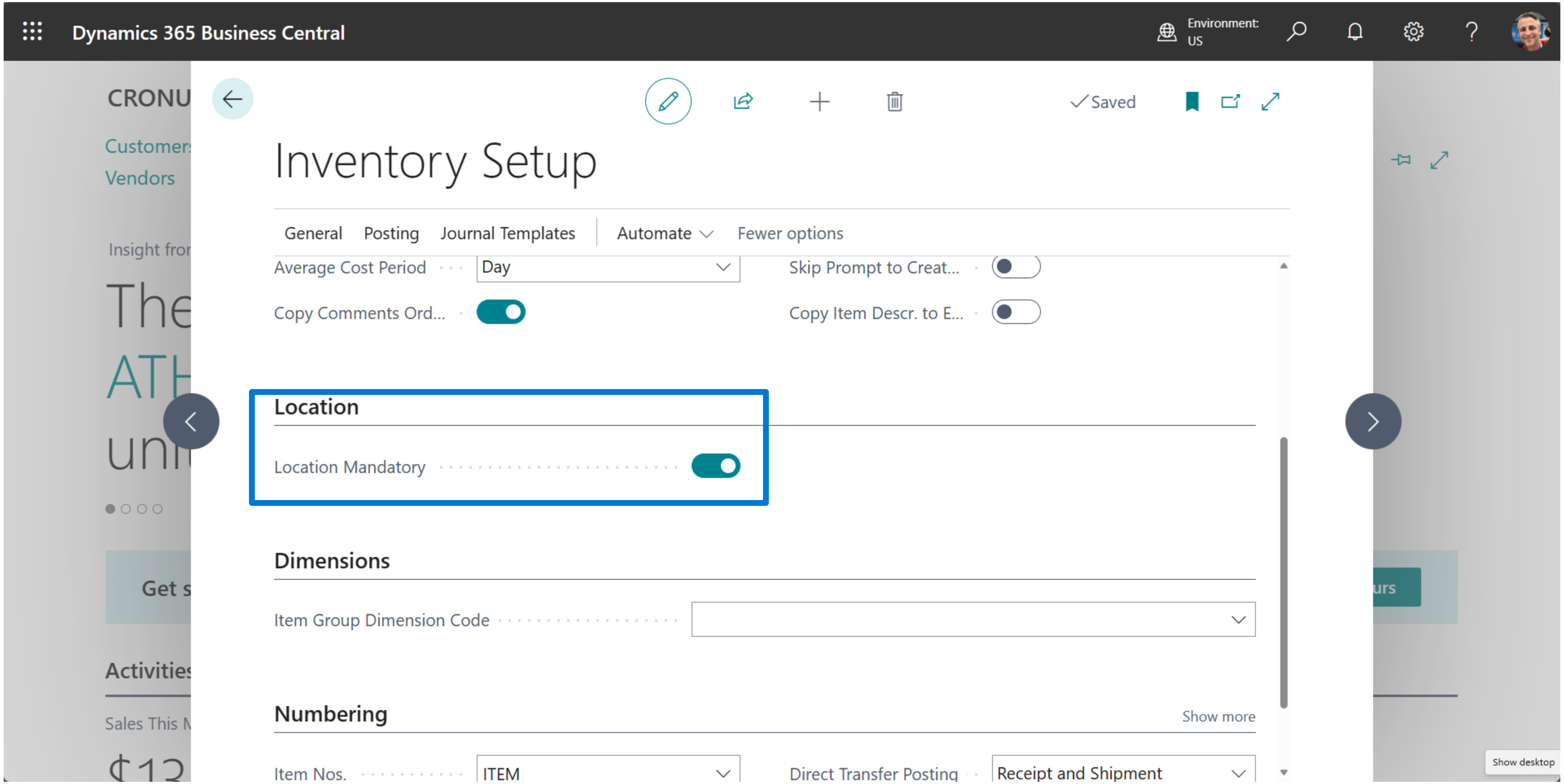
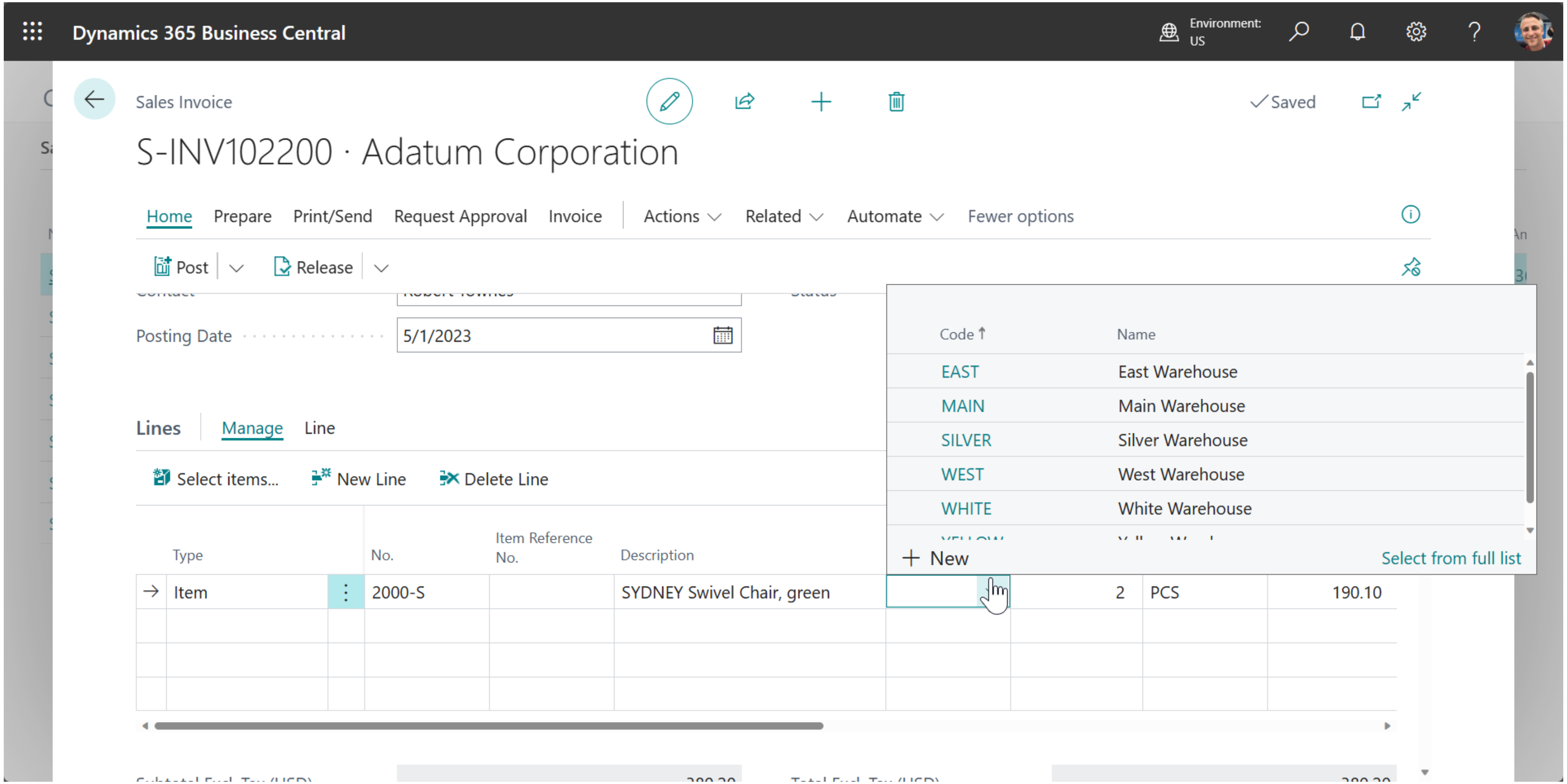


Tip # 16

#16: Don't allow posting without Location Code



#16: Don't allow posting without Location Code



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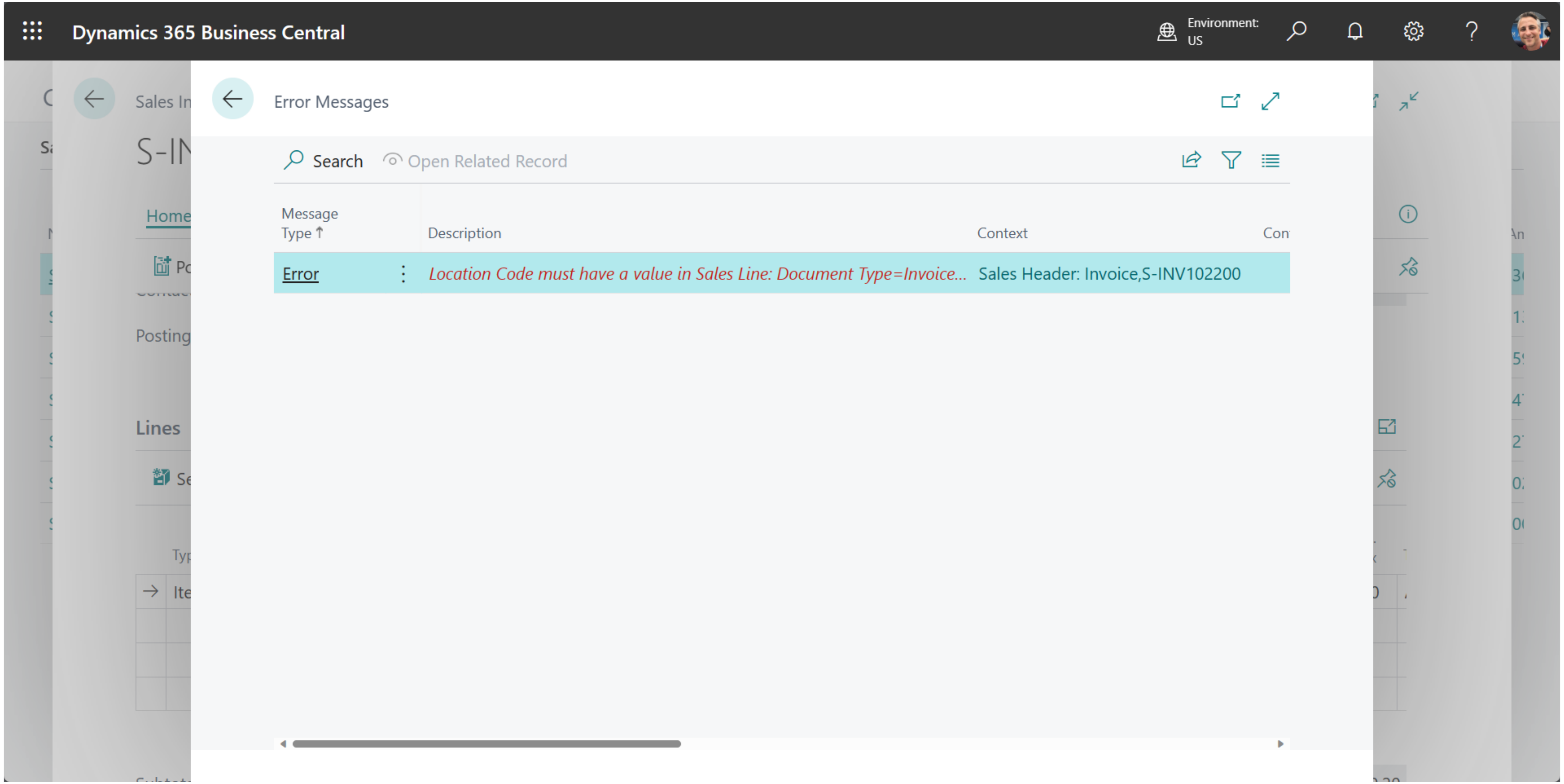
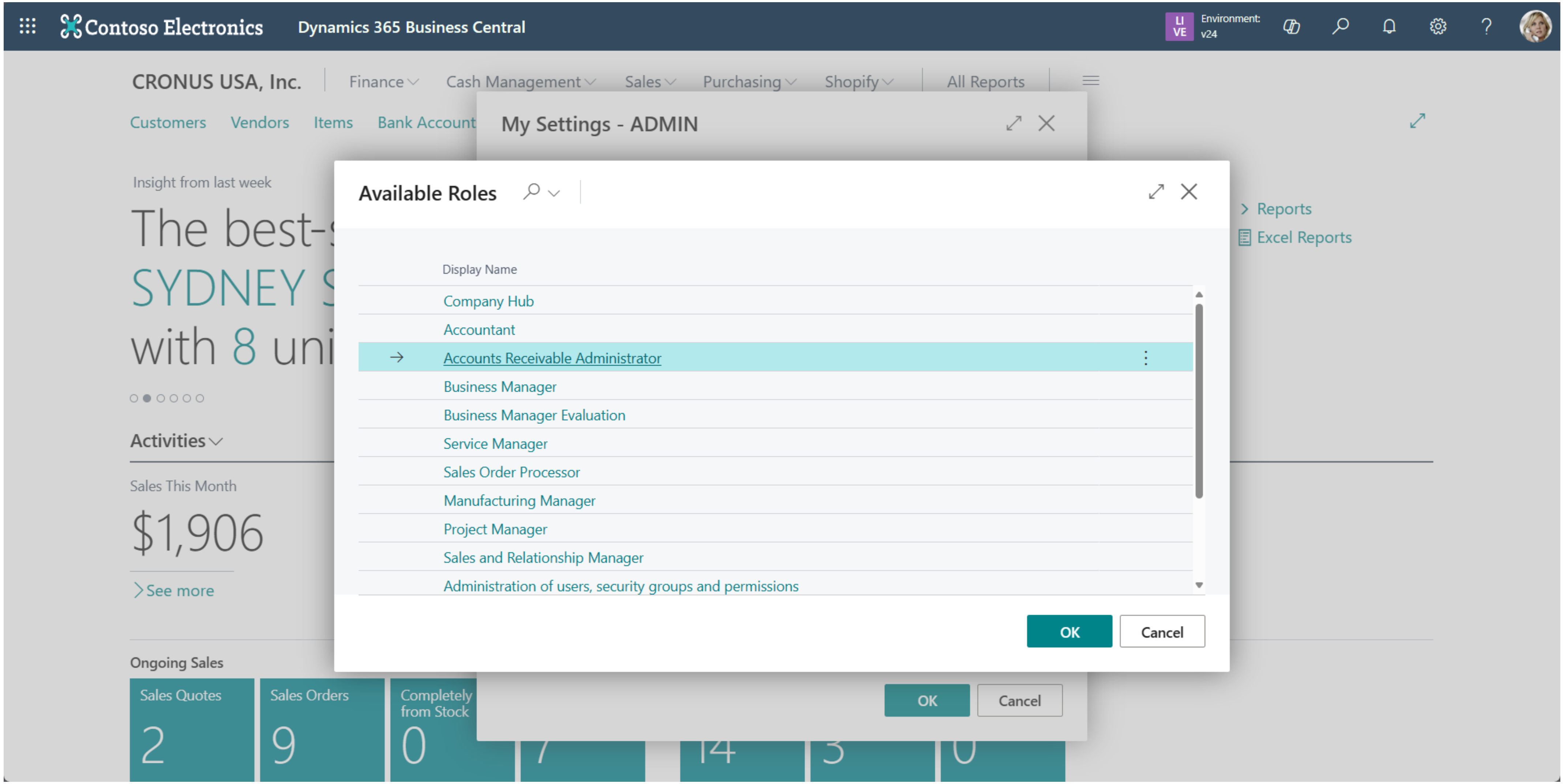
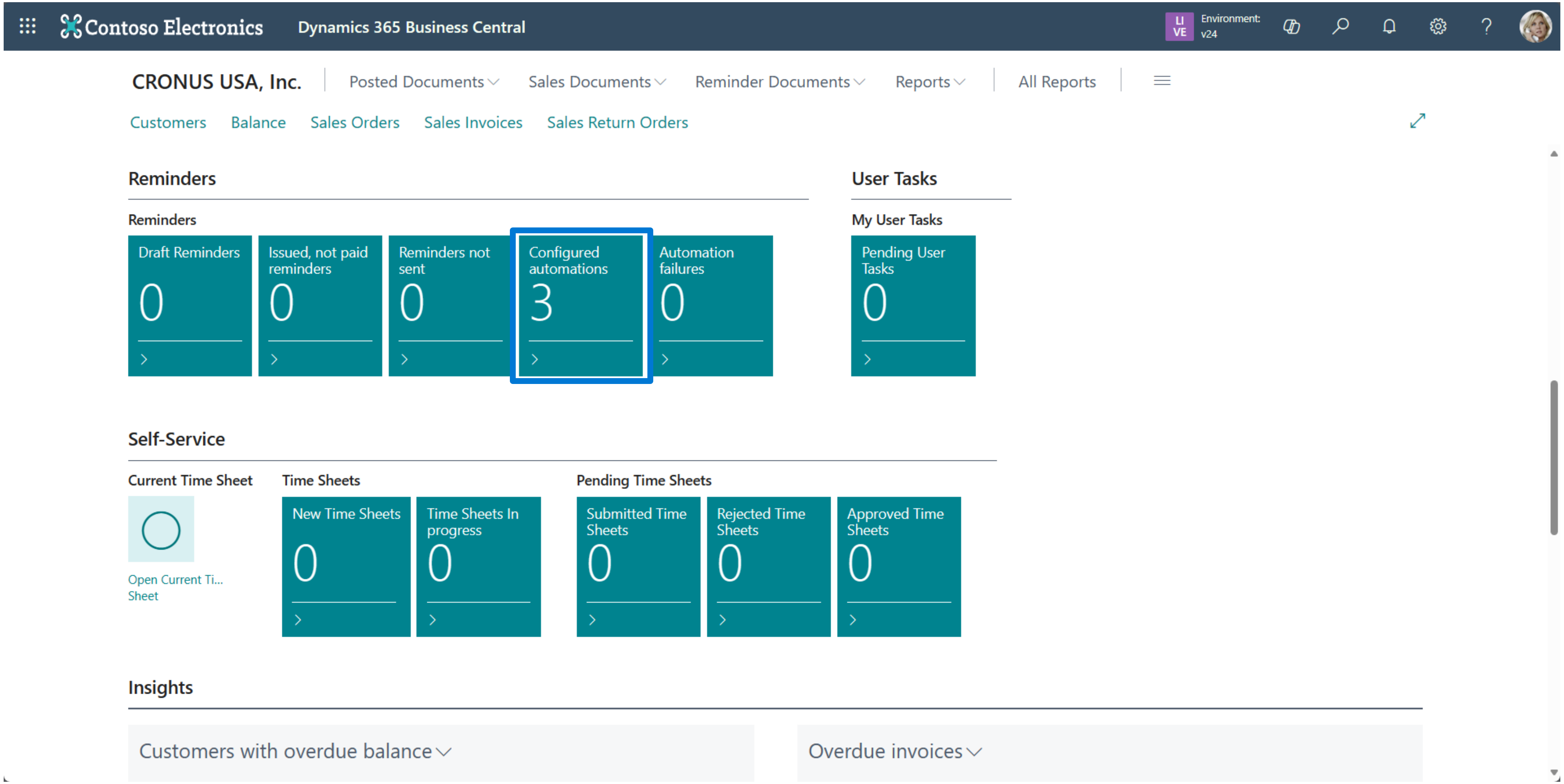


Tip # 17

#17: Fully automate Reminders / Dunning letters



#17: Fully automate Reminders / Dunning letters

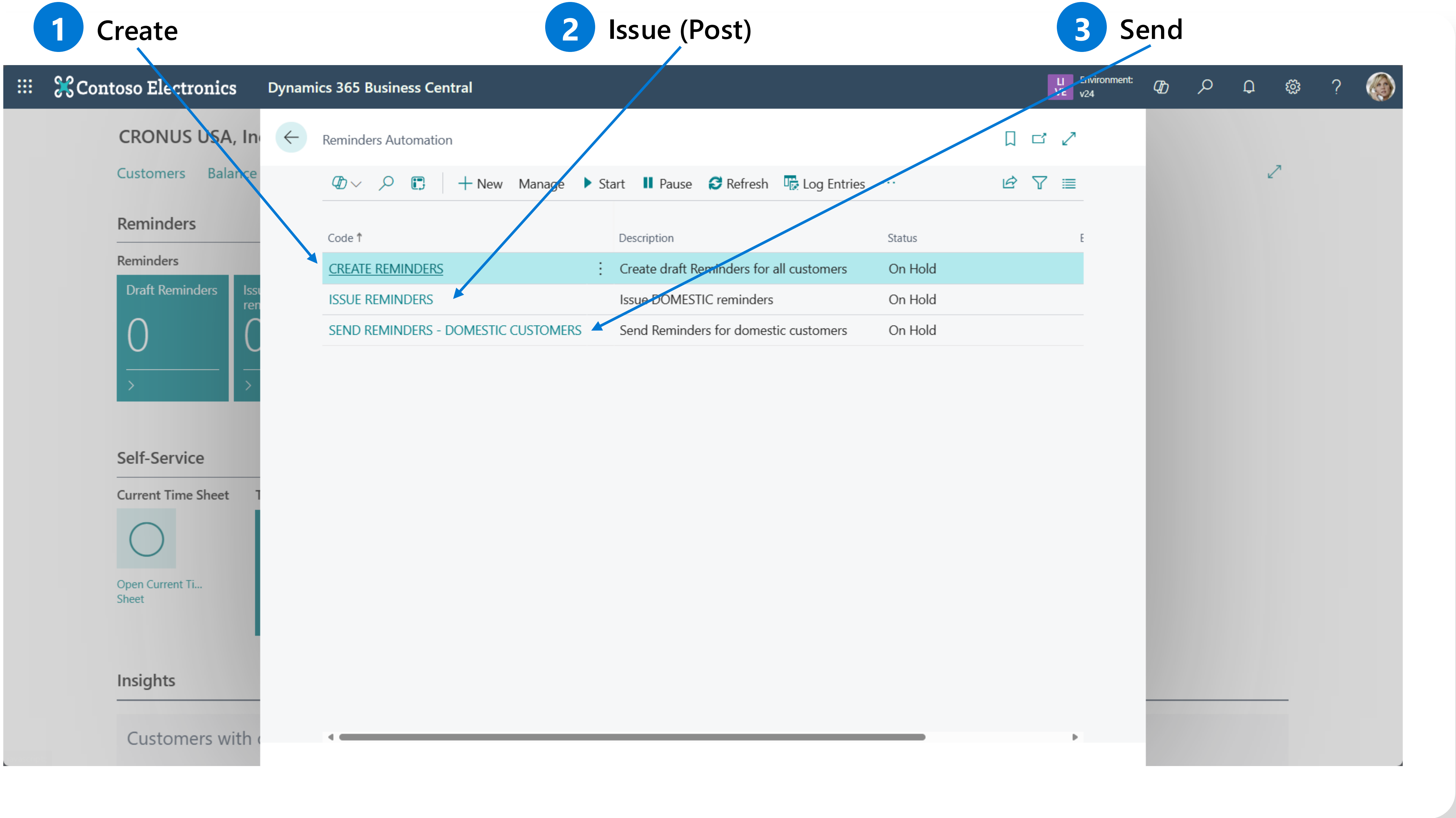


#17: Fully automate Reminders / Dunning letters

Sending Reminders is a 3-step process

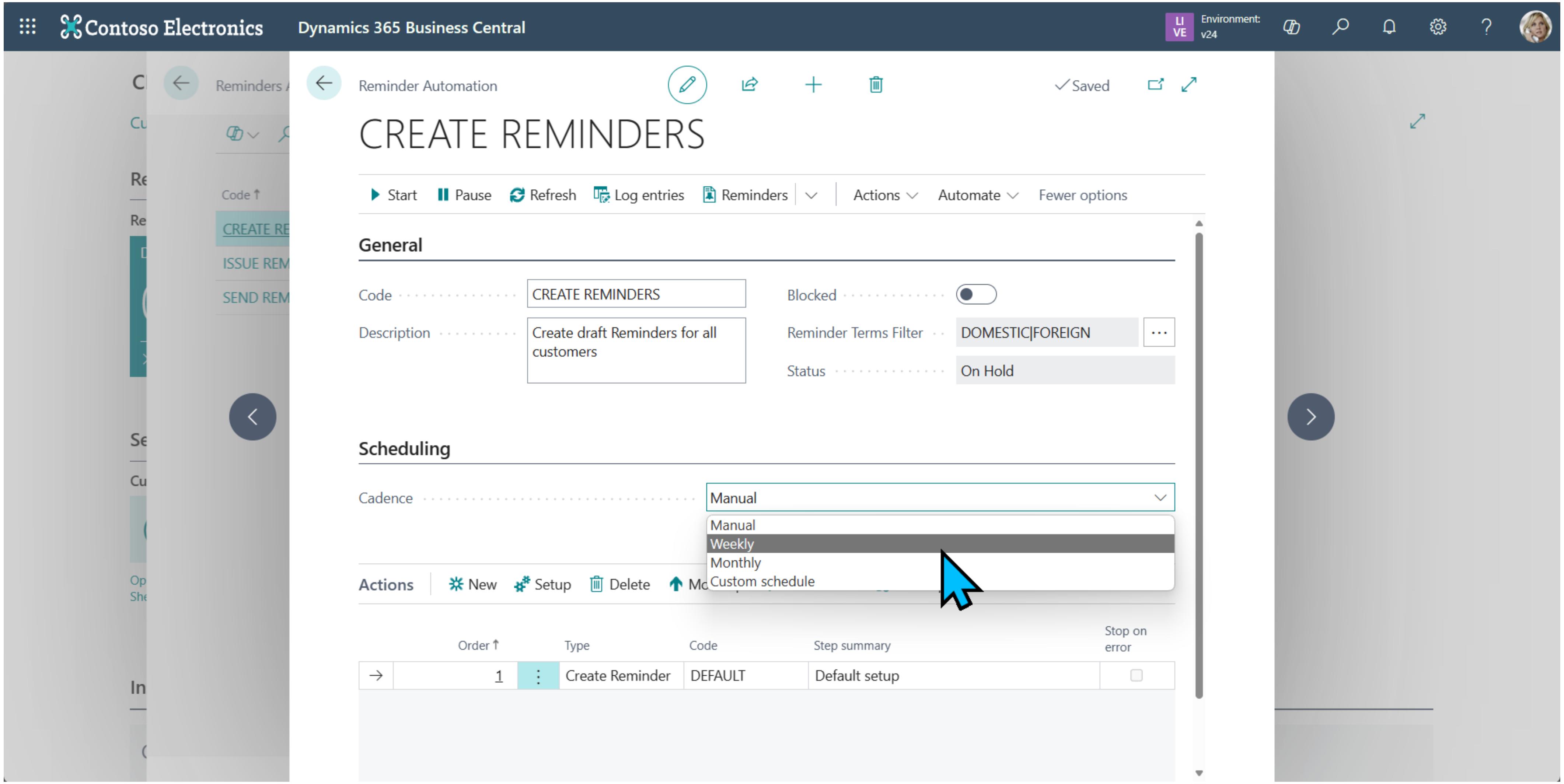
1. Create
2. Issue (Post)
3. Send

#17: Fully automate Reminders / Dunning letters

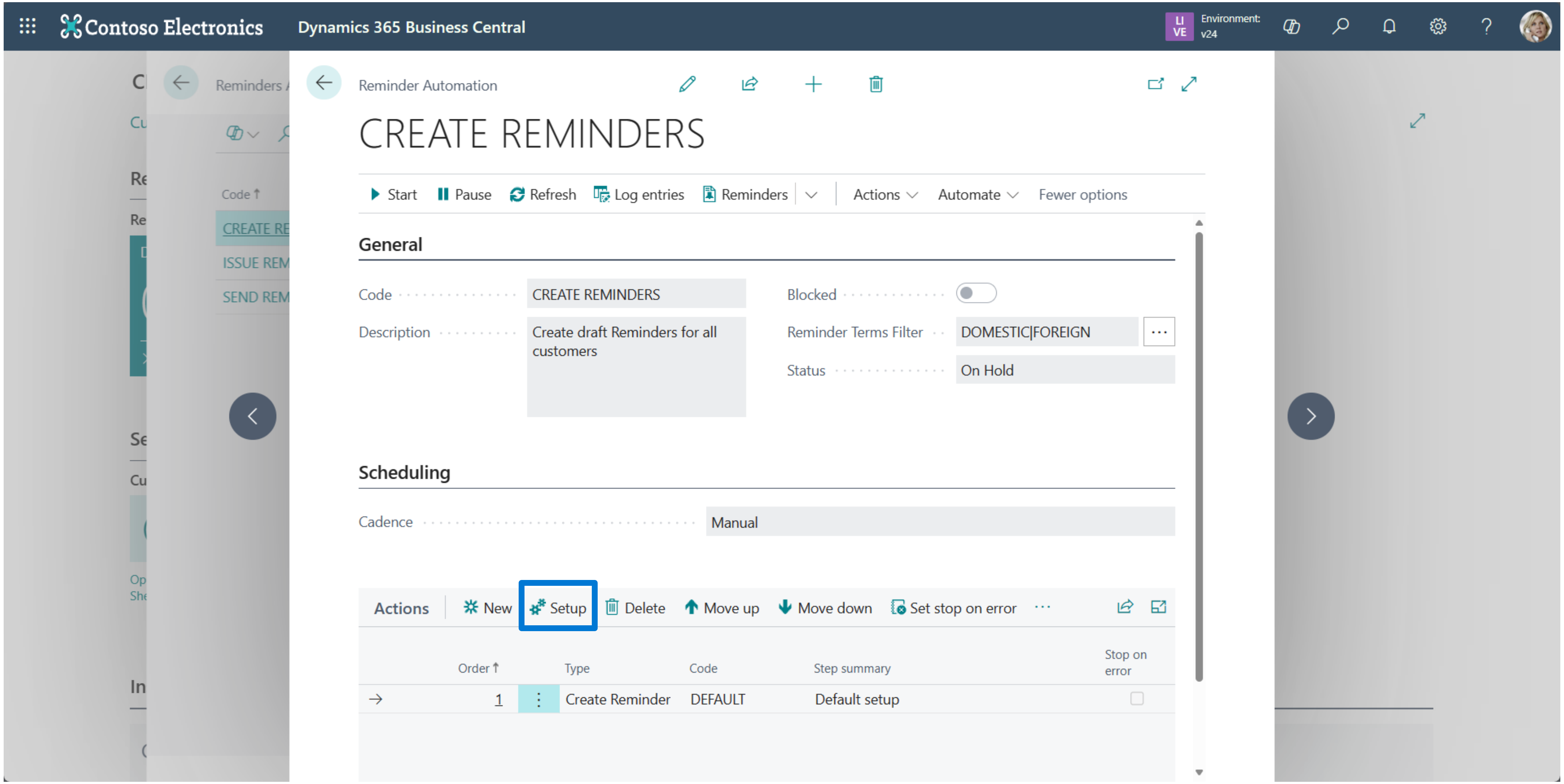


#17: Fully automate Reminders / Dunning letters

1 Create

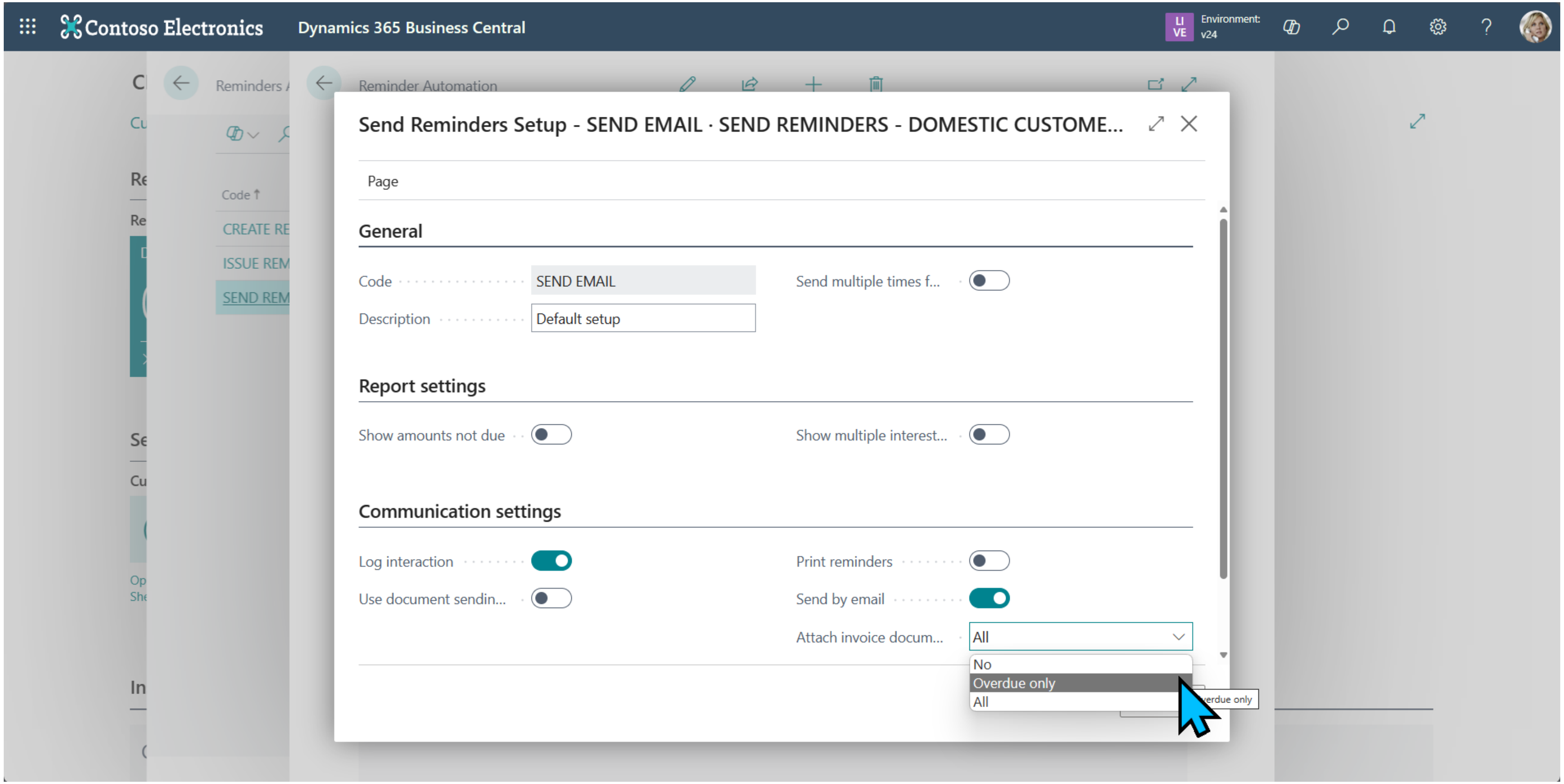


#17: Fully automate Reminders / Dunning letters



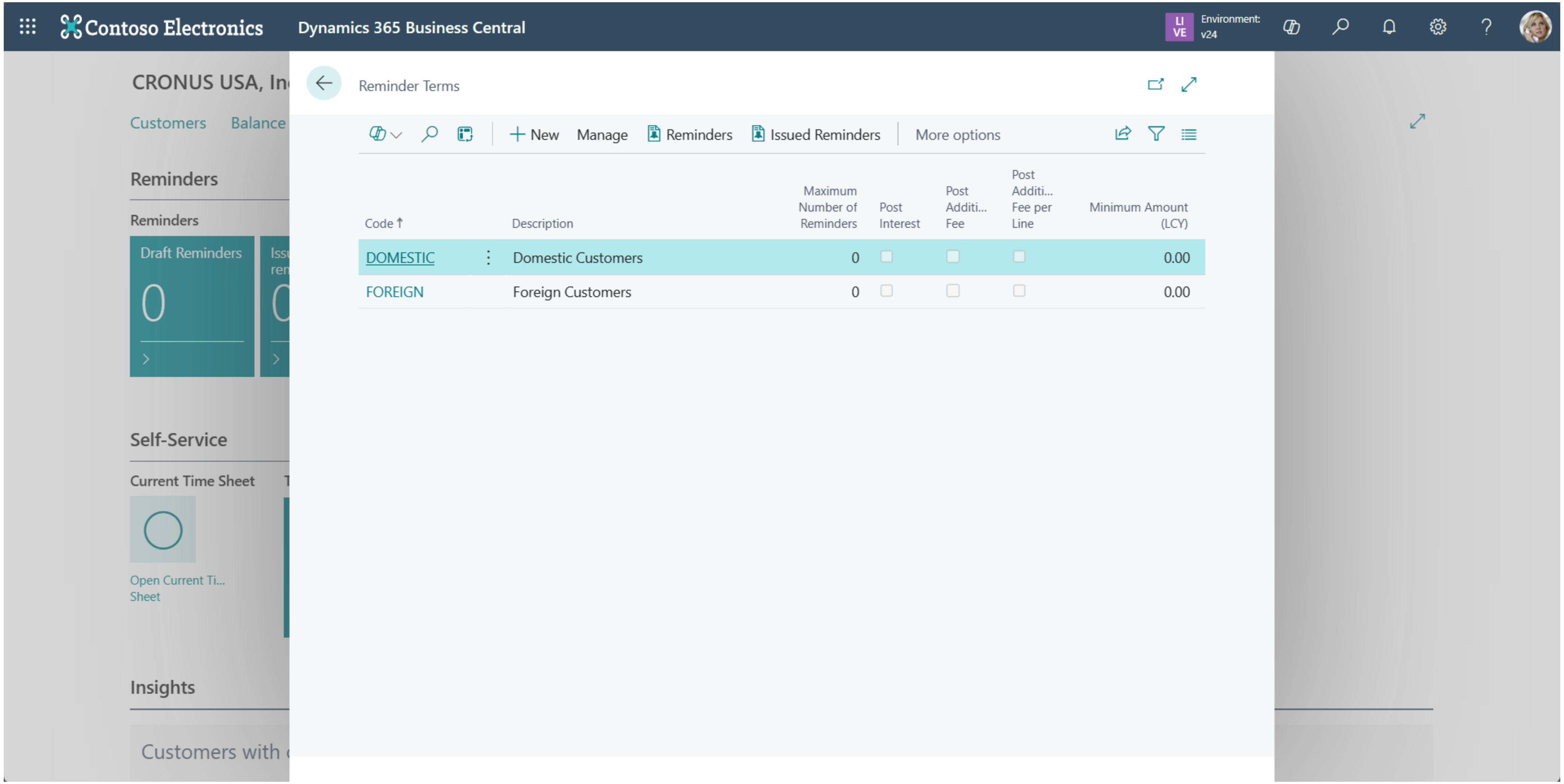
#17: Fully automate Reminders / Dunning letters

3 Send



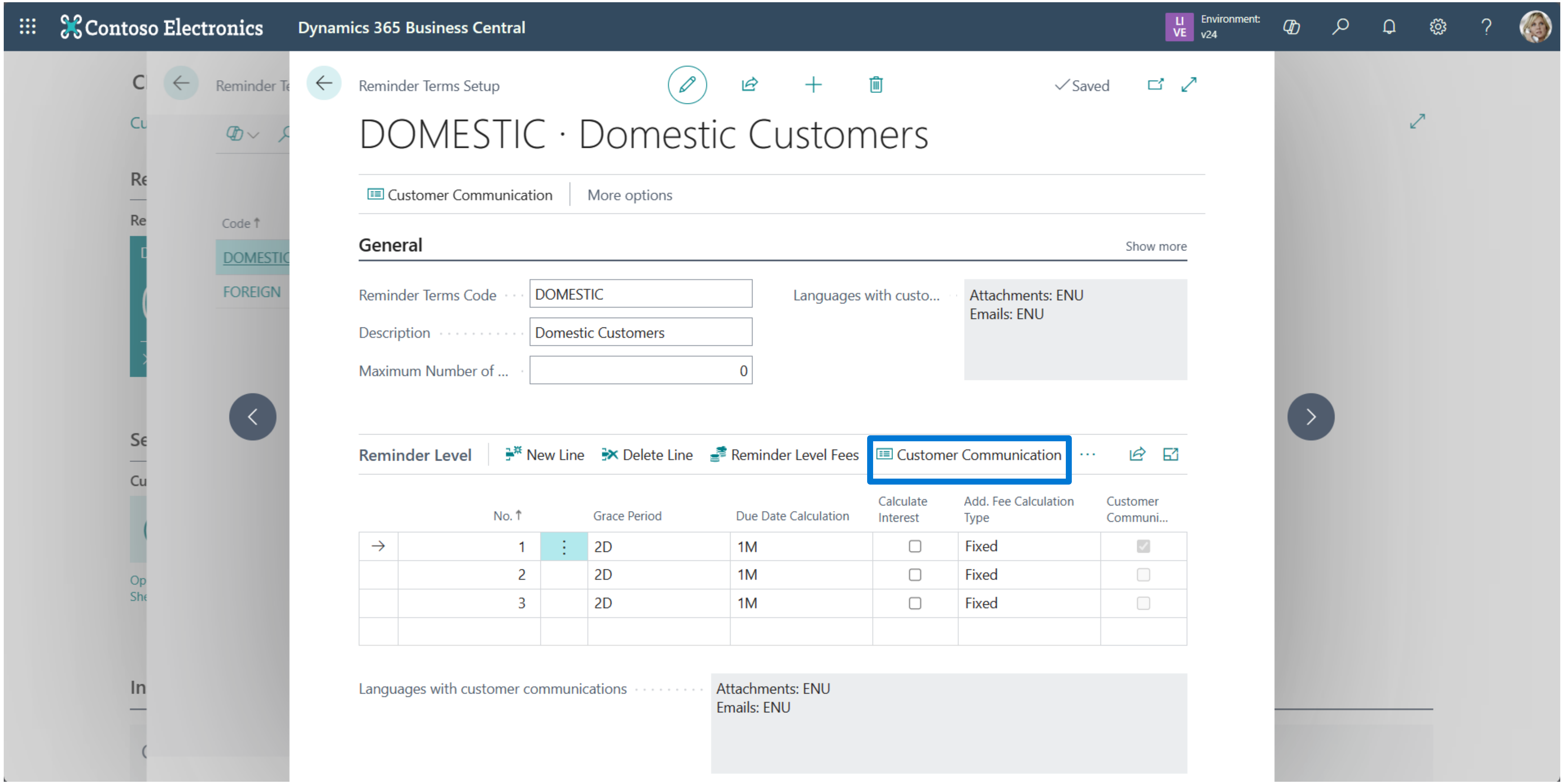
#17: Fully automate Reminders / Dunning letters

Tailor e-mail texts per Reminder Level



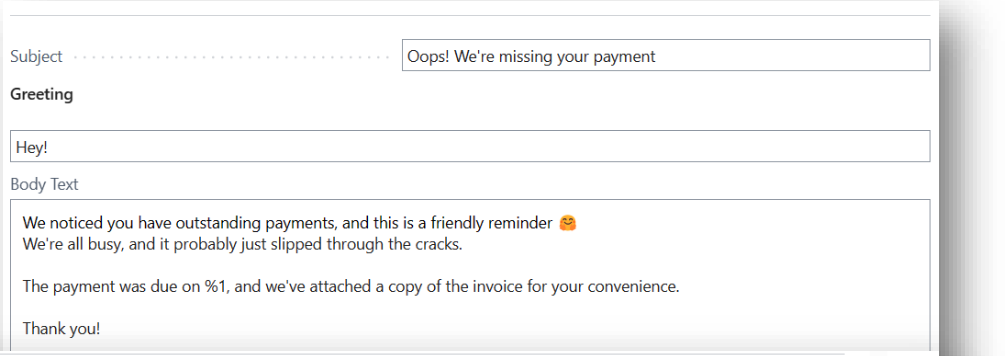
#17: Fully automate Reminders / Dunning letters

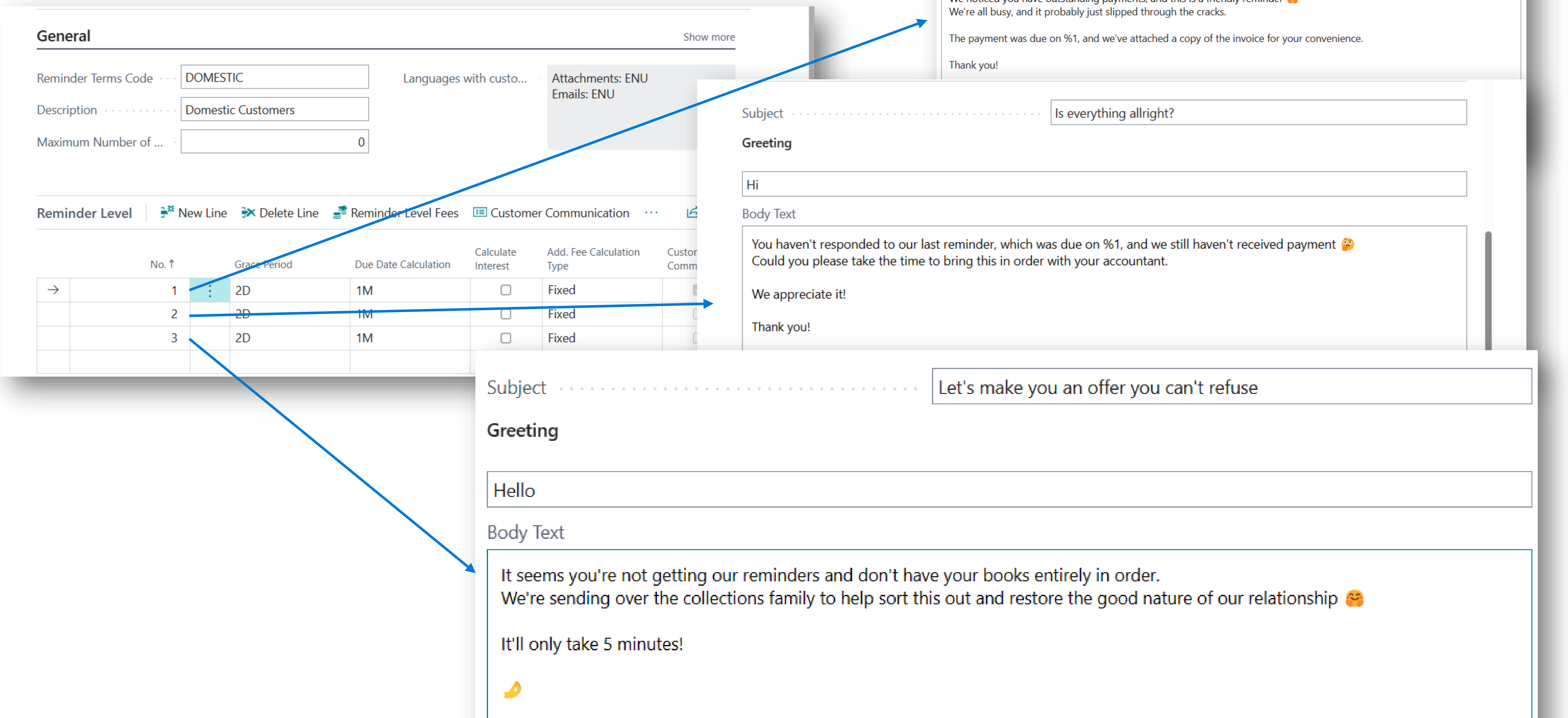
Tailor e-mail texts per Reminder Level



#17: Fully automate Reminders / Dunning letters

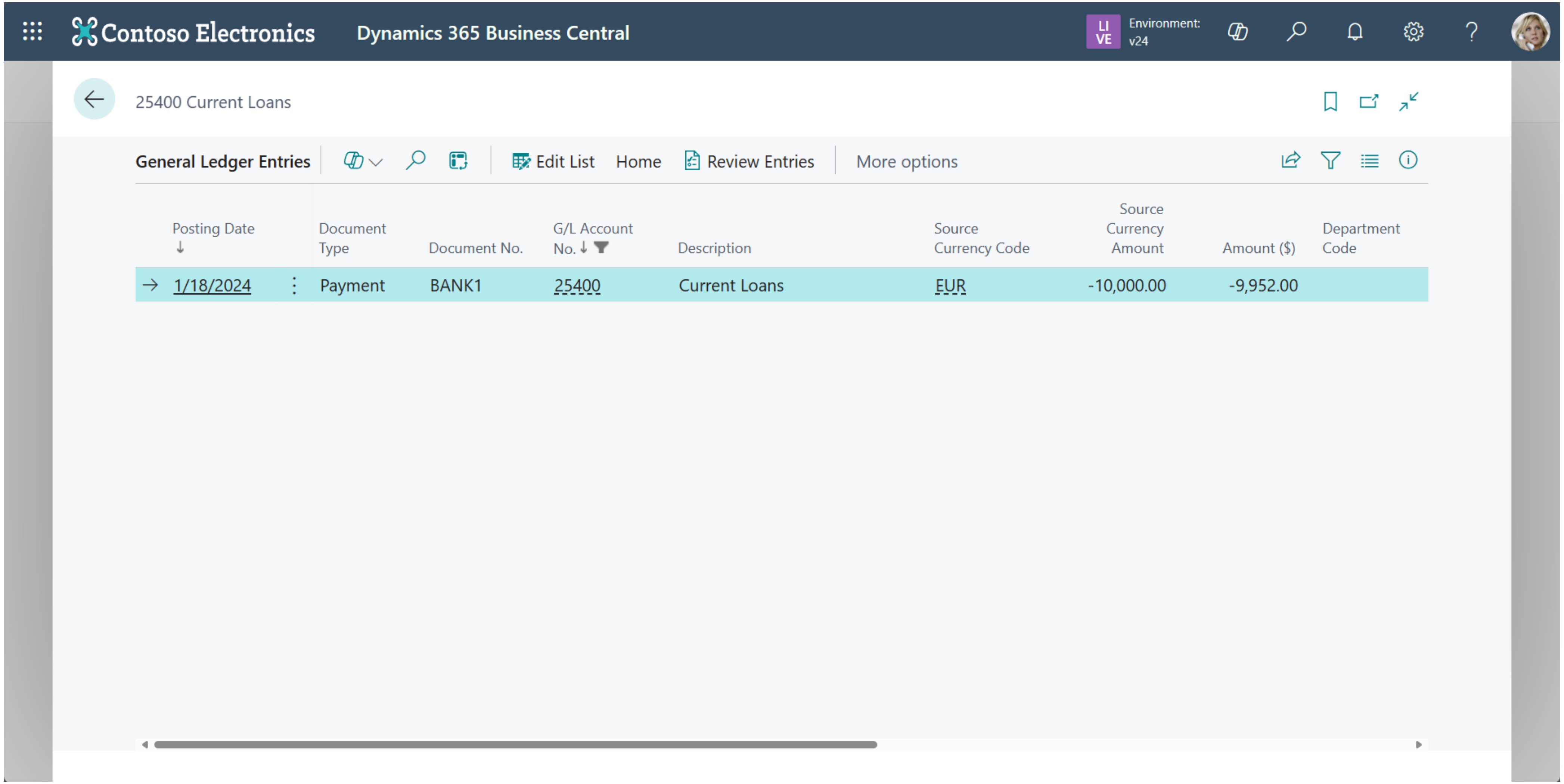
Tailor e-mail texts per Reminder Level



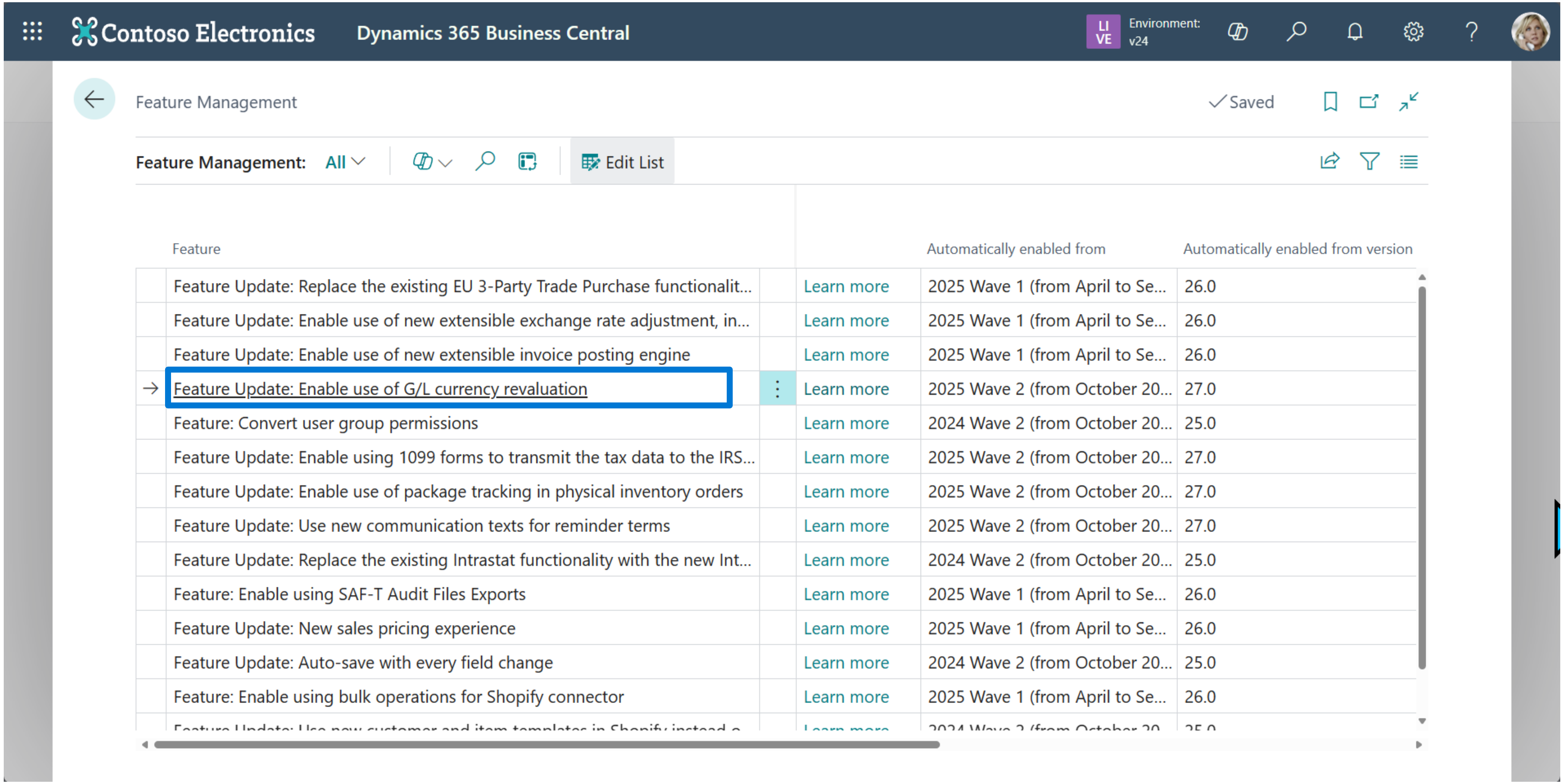


Tip # 18

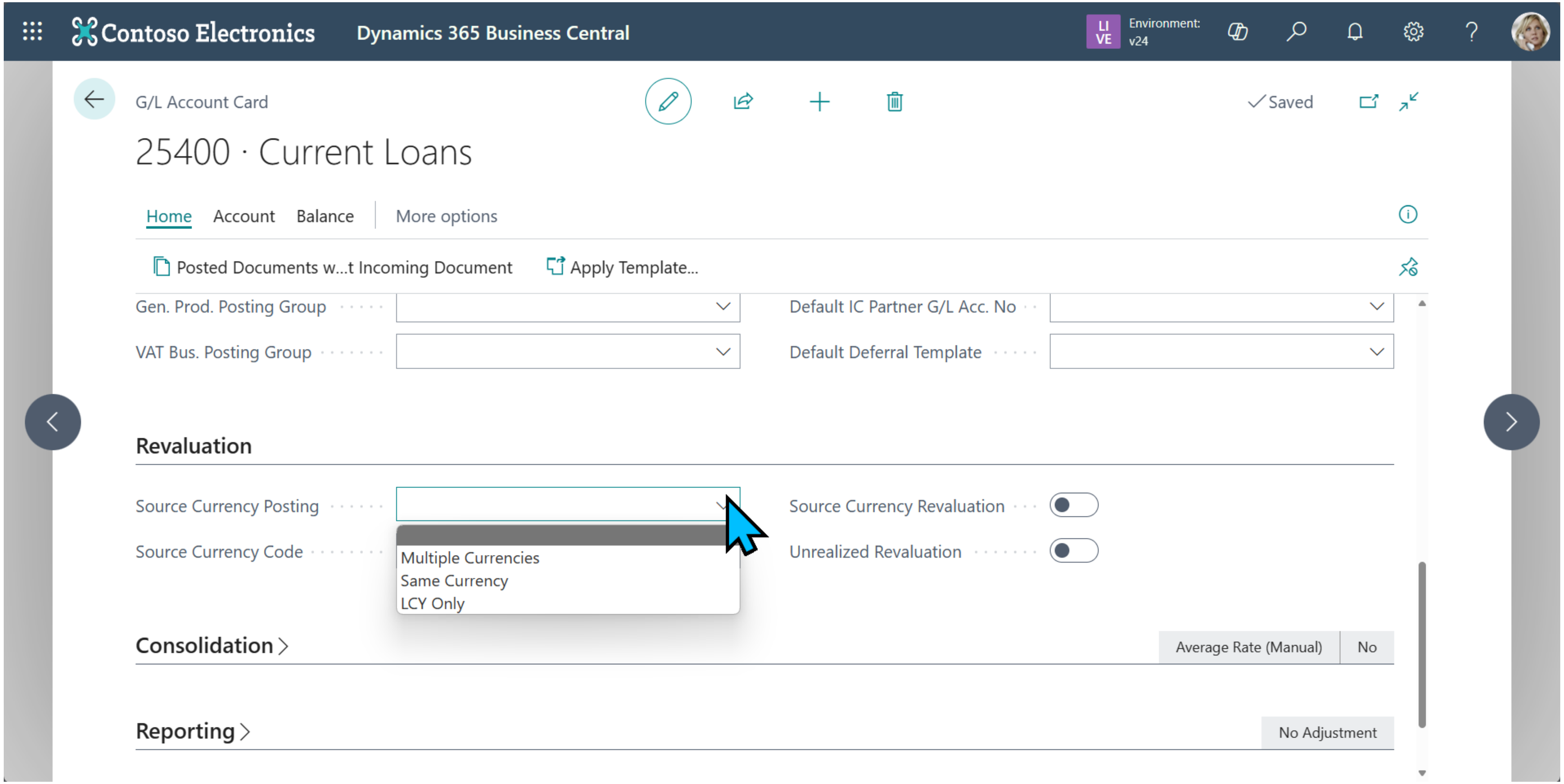
#18: Revaluation of G/L Account (track source currency code & amount on G/L)



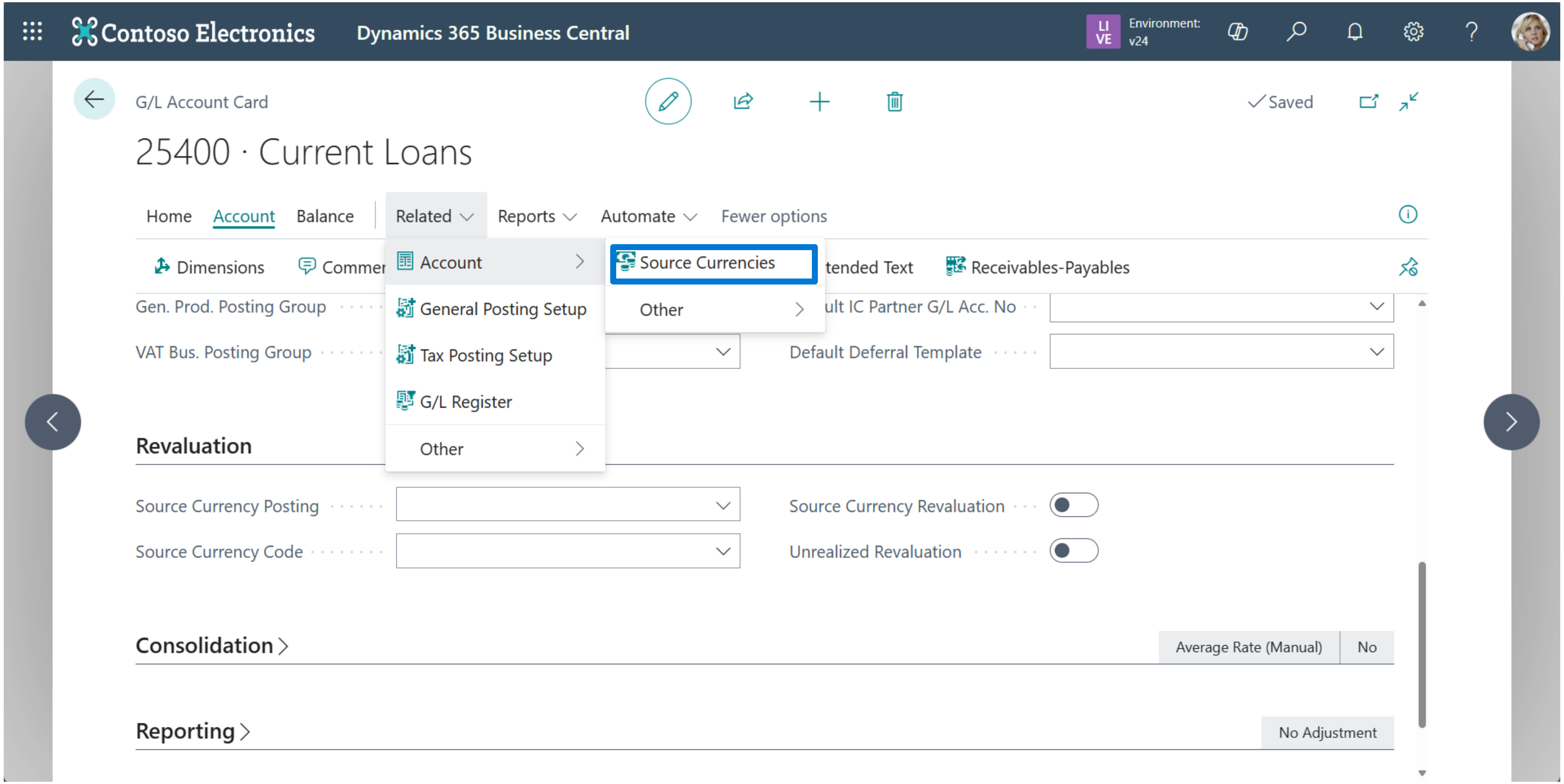
#18: Revaluation of G/L Account (track source currency on G/L)



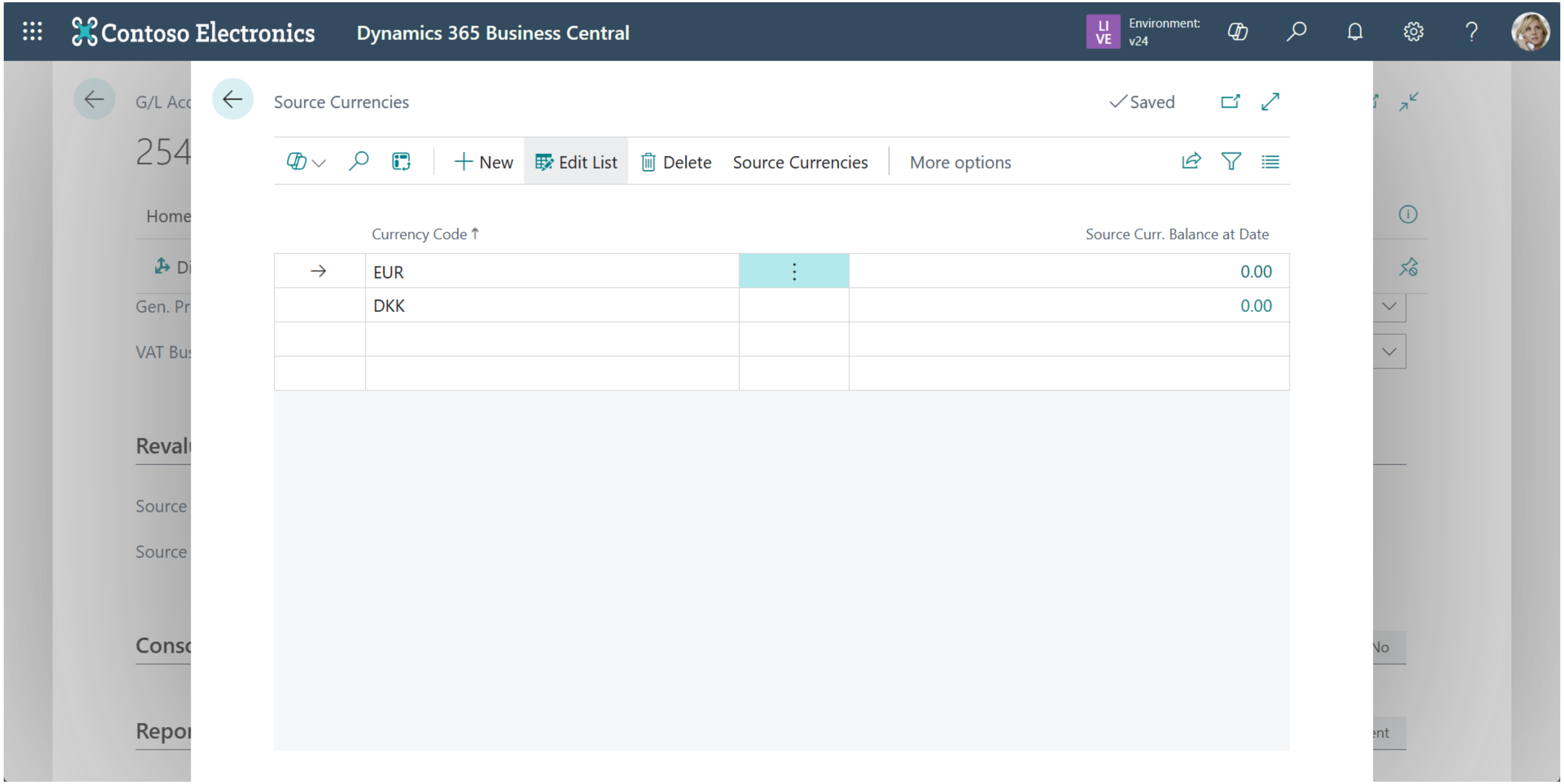
#18: Revaluation of G/L Account (track source currency on G/L)



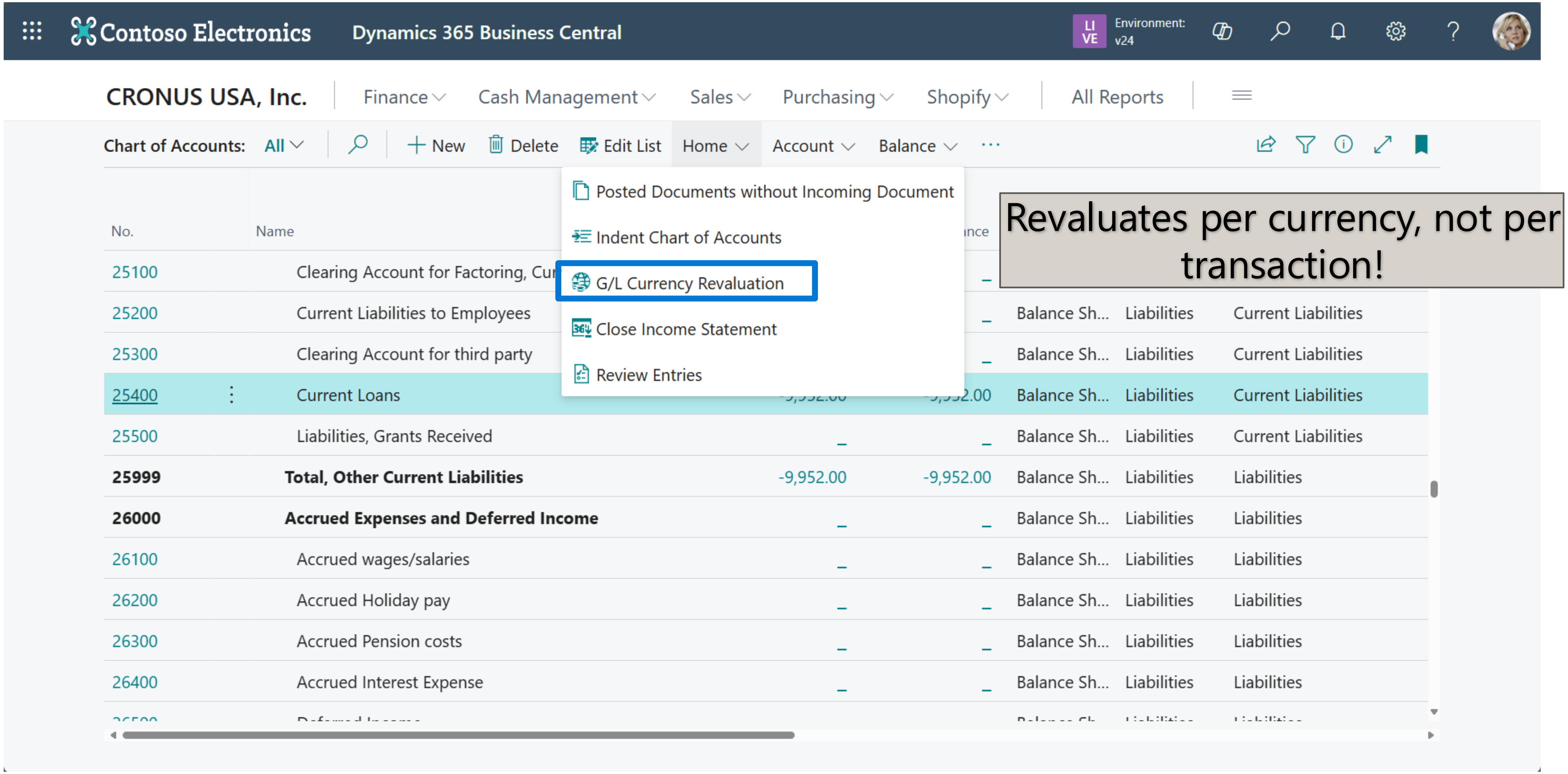
#18: Revaluation of G/L Account (track source currency on G/L)



#18: Revaluation of G/L Account (track source currency on G/L)

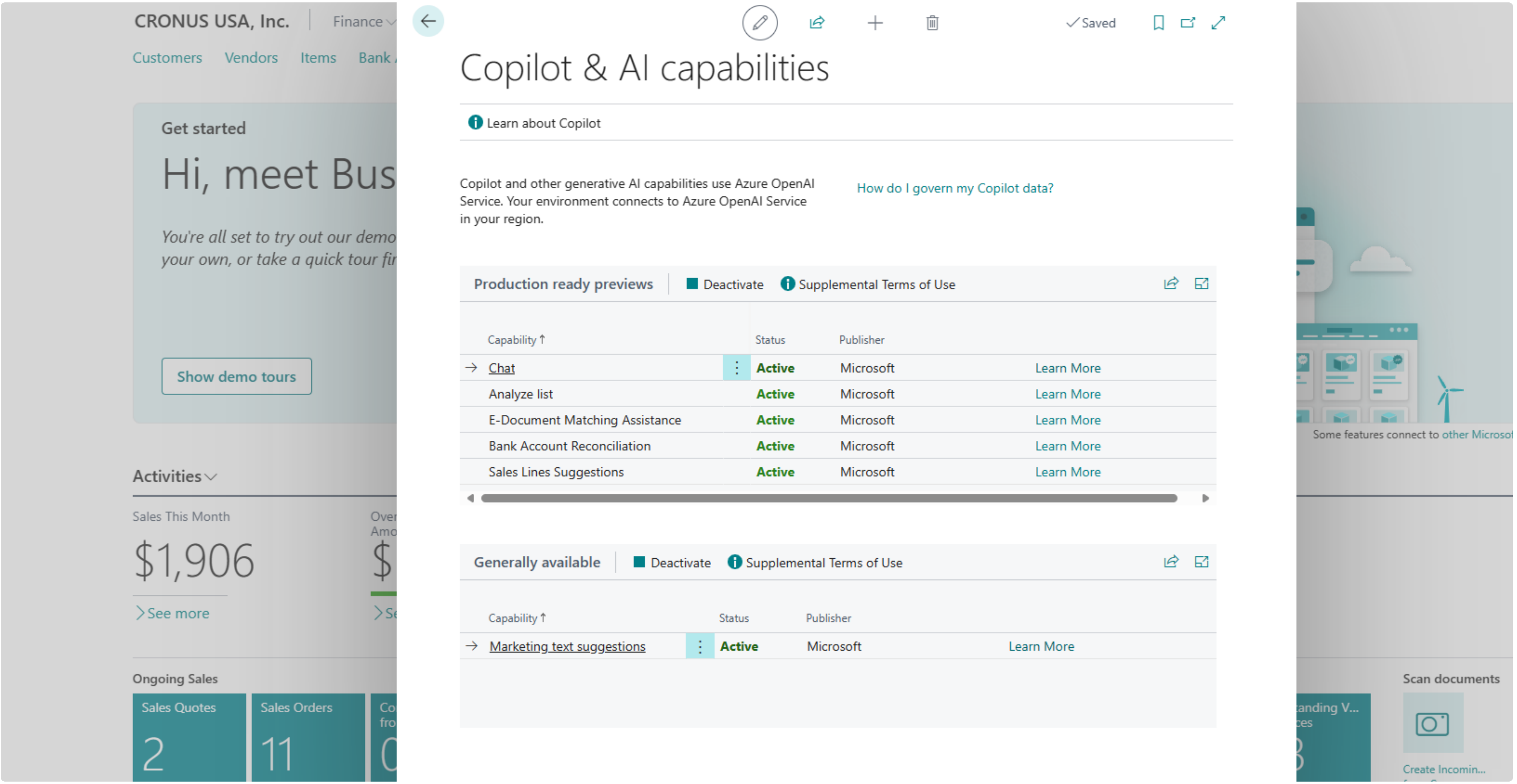


#18: Revaluation of G/L Account (track source currency on G/L)



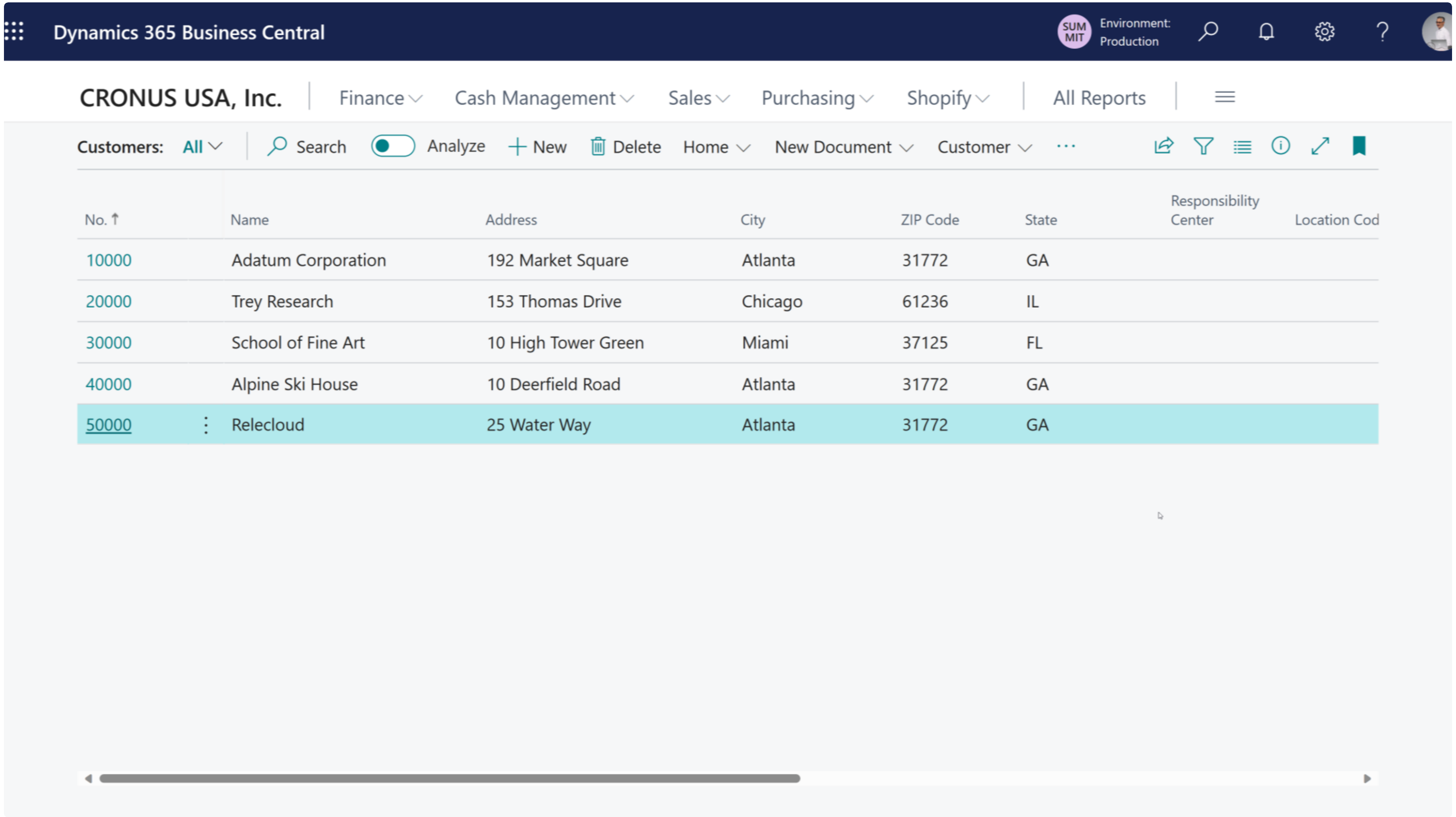
Tip # 19

#19: Manage Copilot features

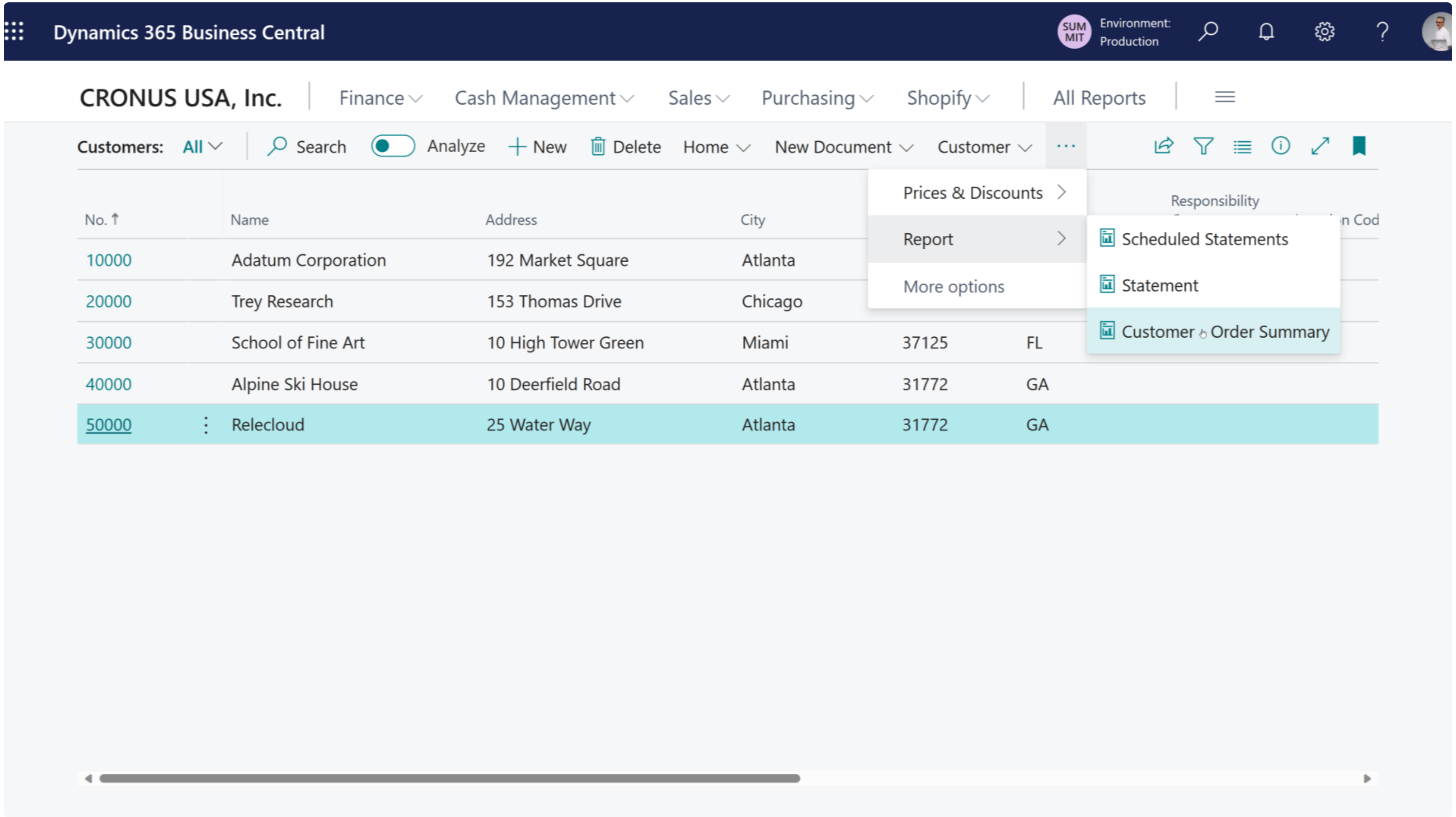


Tip # 20

#20: Share report settings across the company



#20: Share report settings across the company



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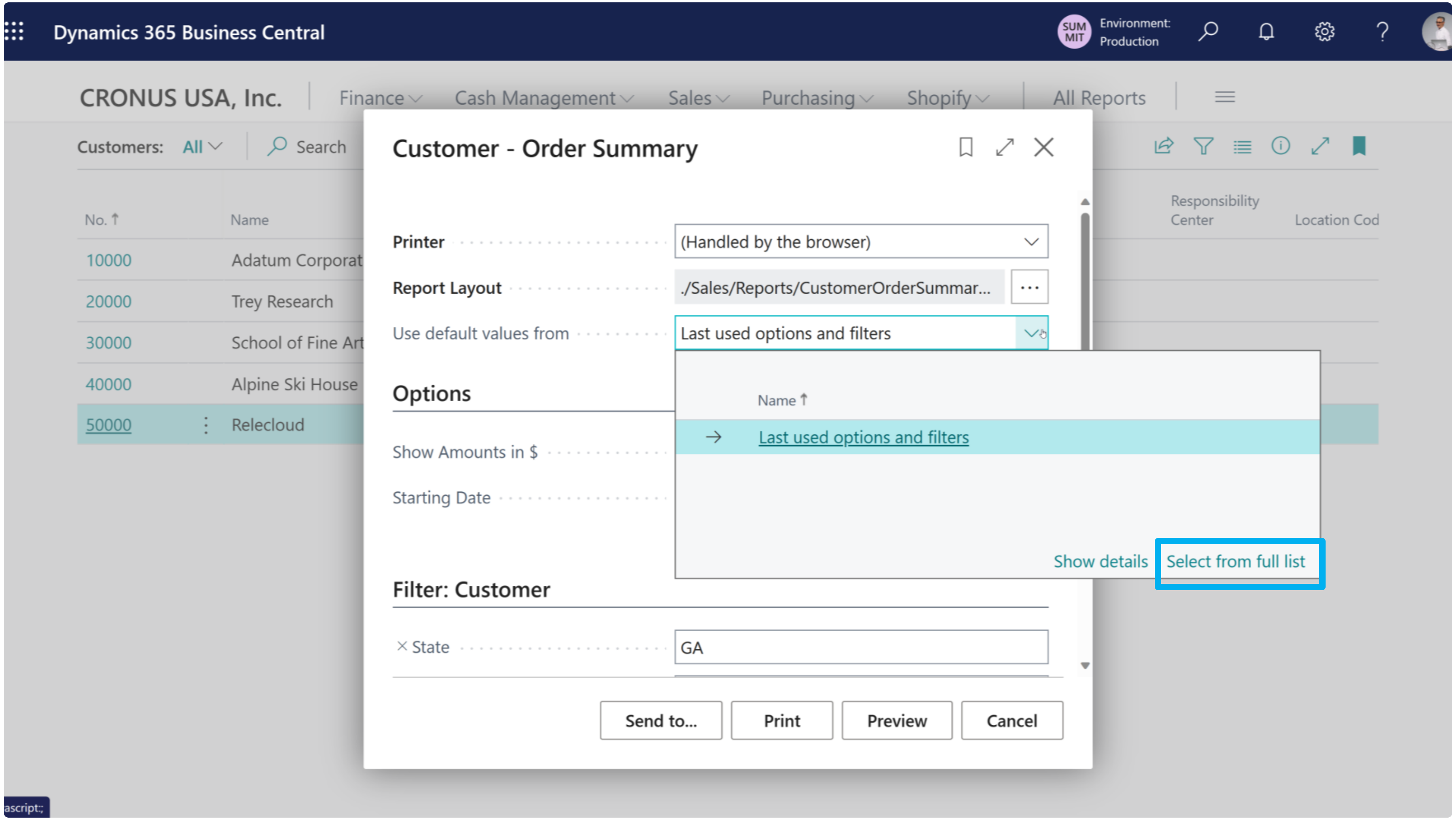
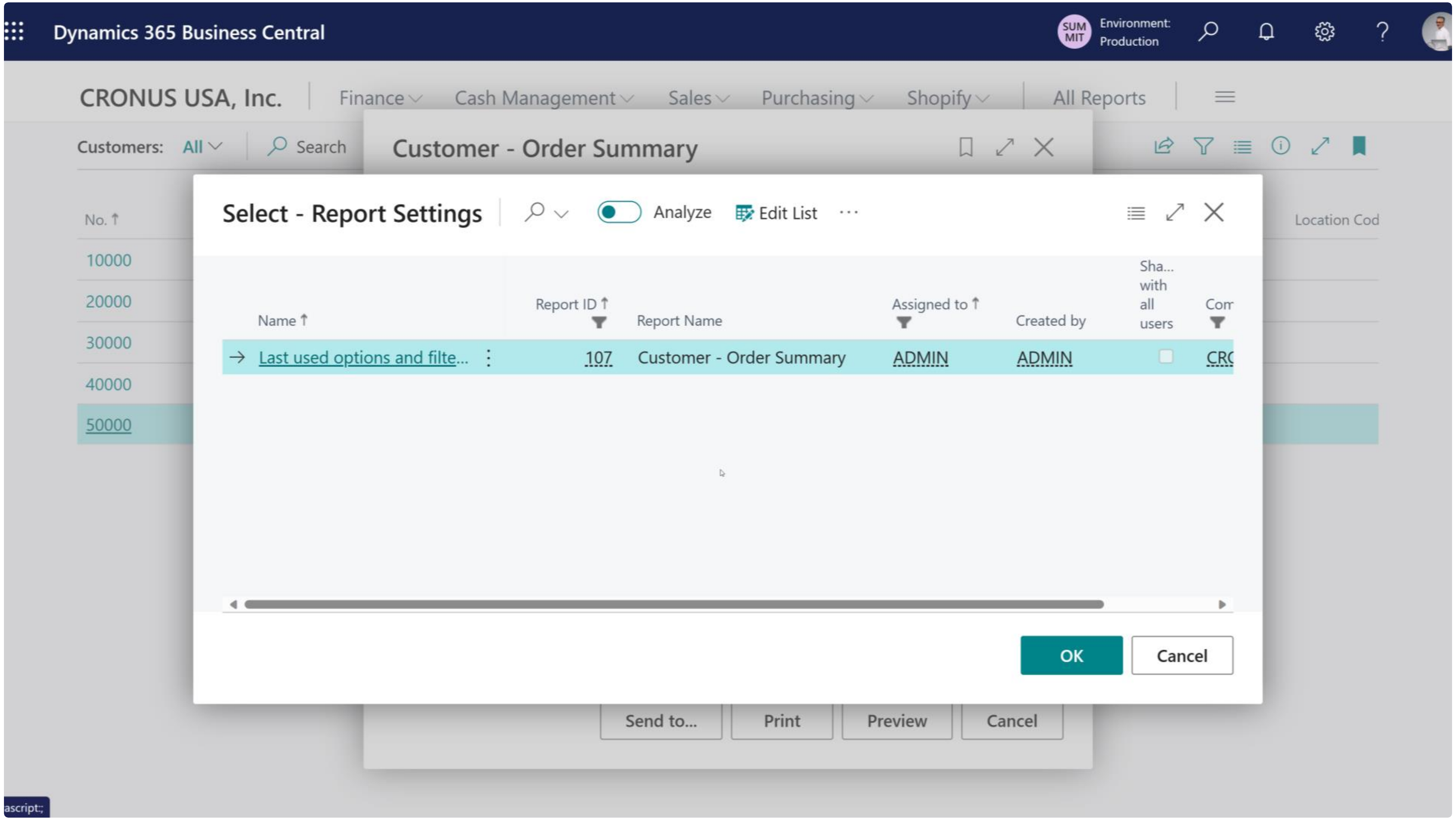


#20: Share report settings across the company



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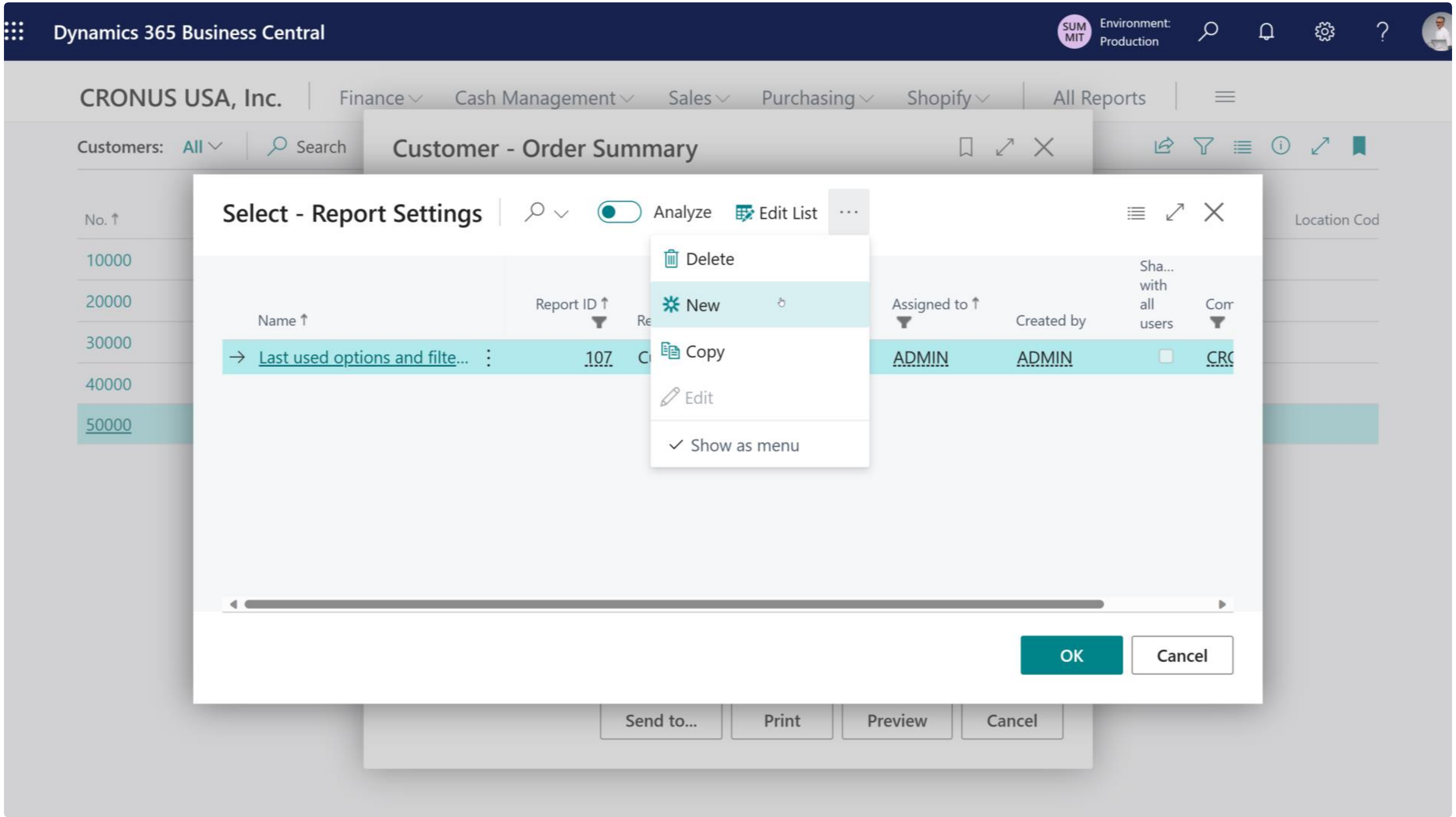
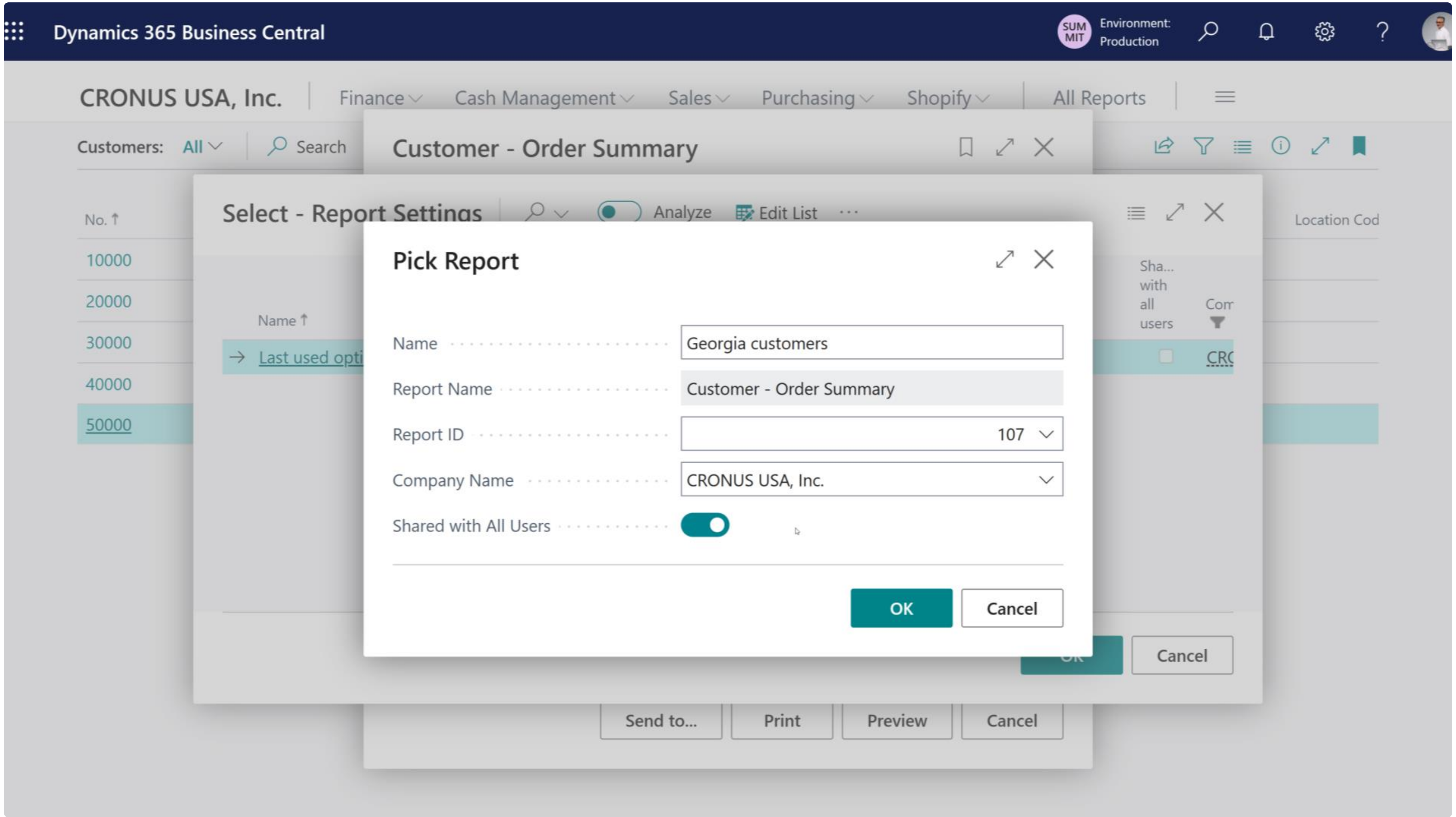
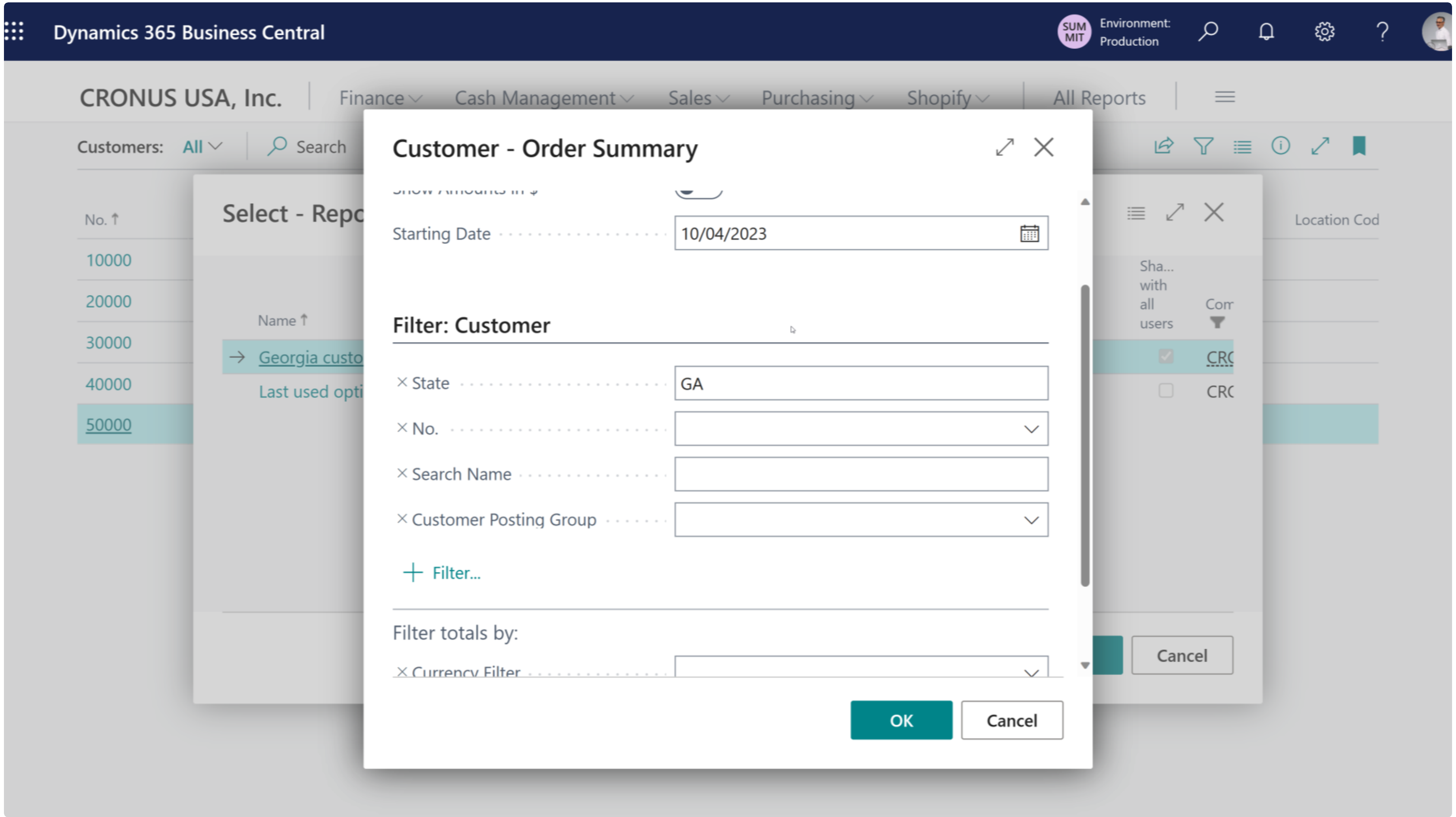


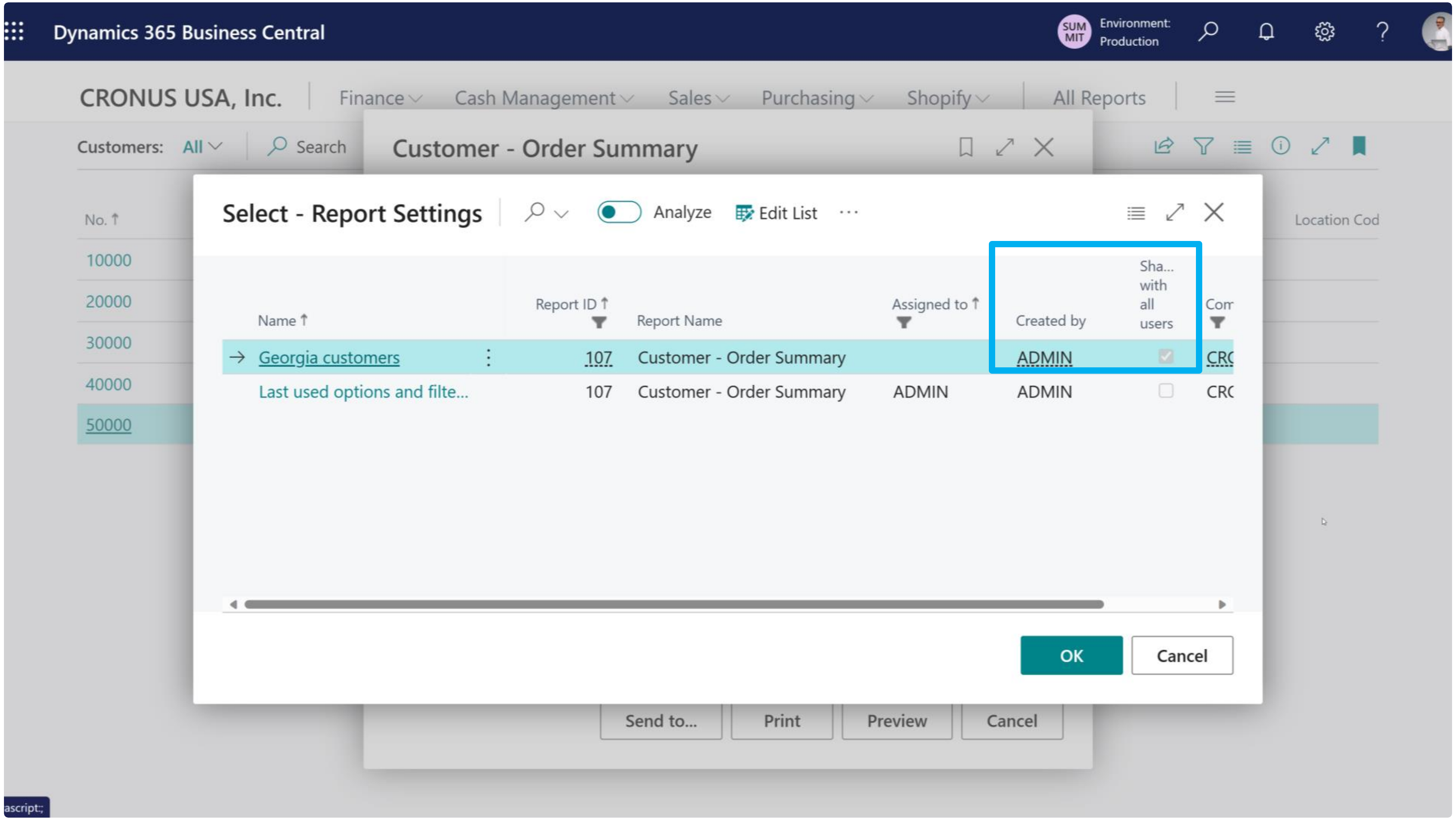
#20: Share report settings across the company



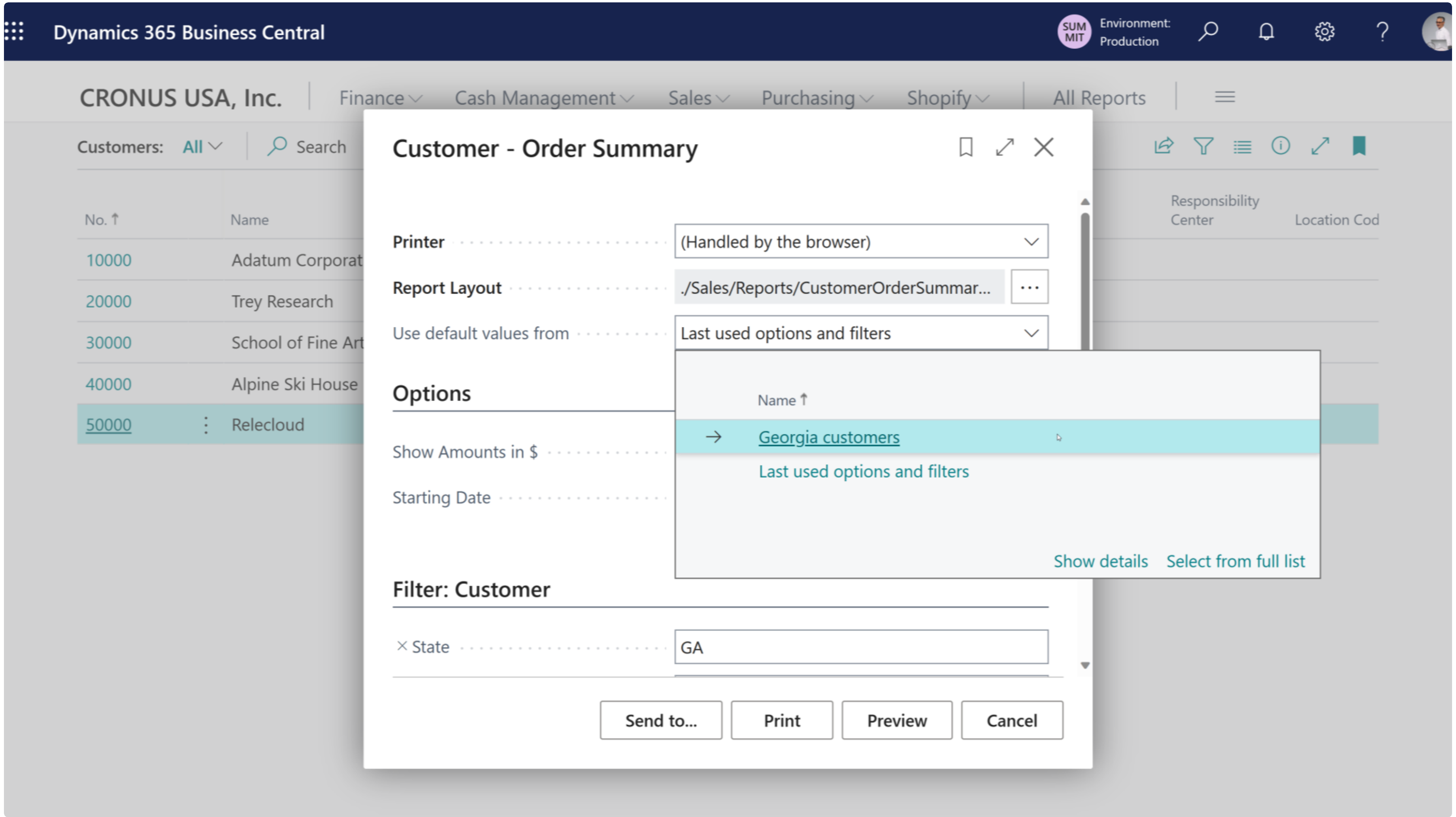
#20: Share report settings across the company



#20: Share report settings across the company

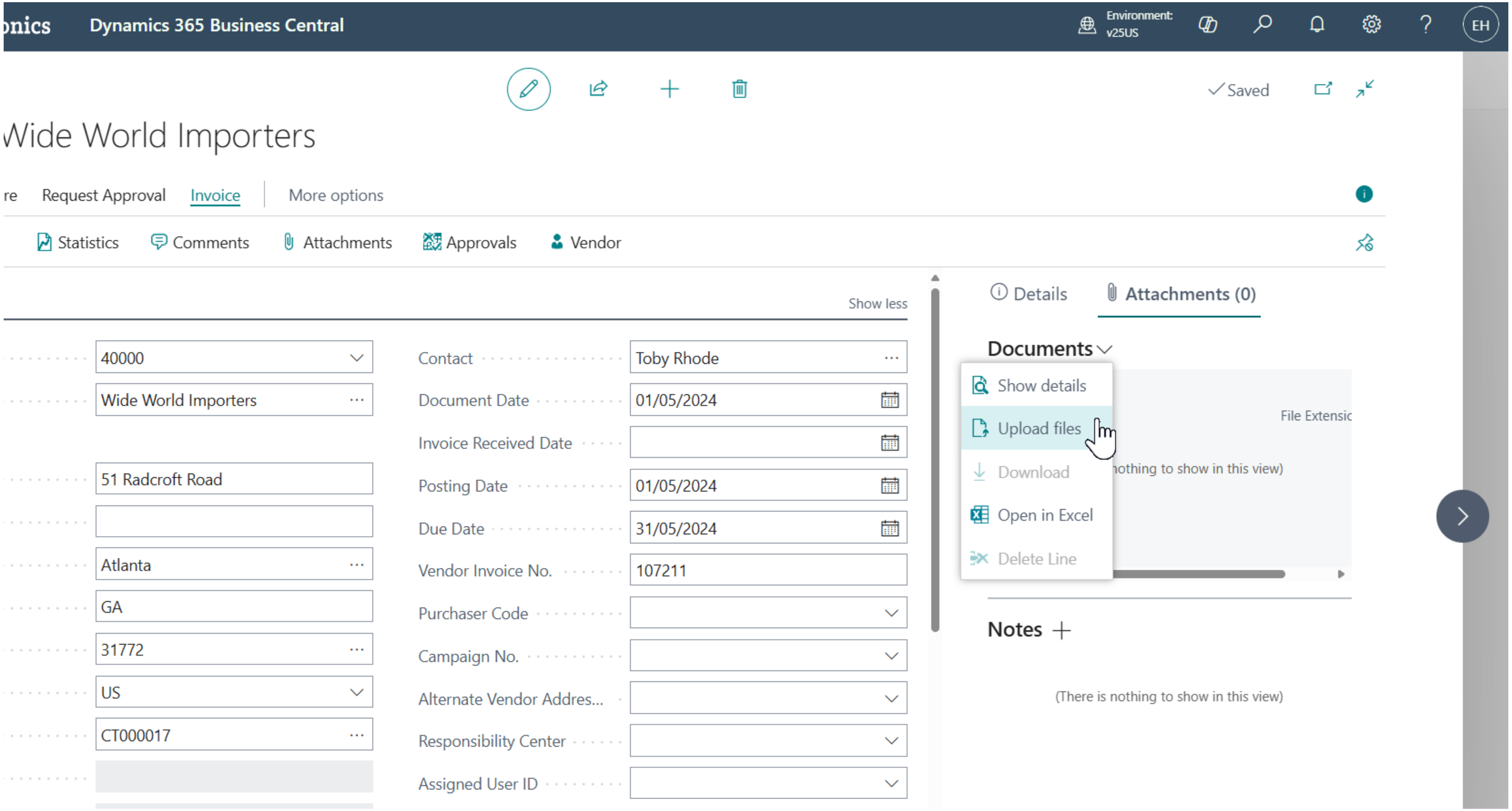


#20: Share report settings across the company



Tip # 21

#21: Upload multiple files in the new Document Attachment FactBox



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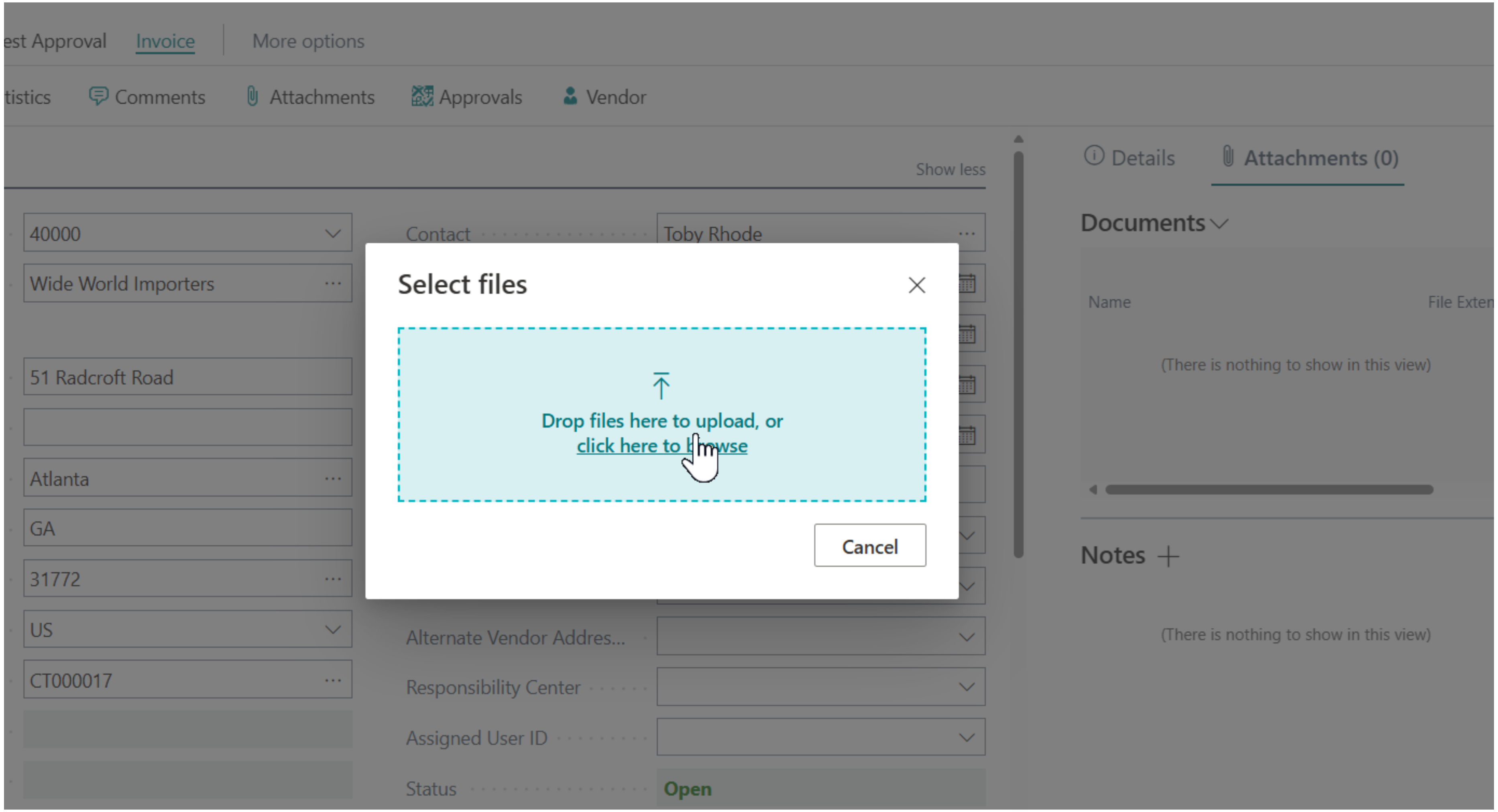

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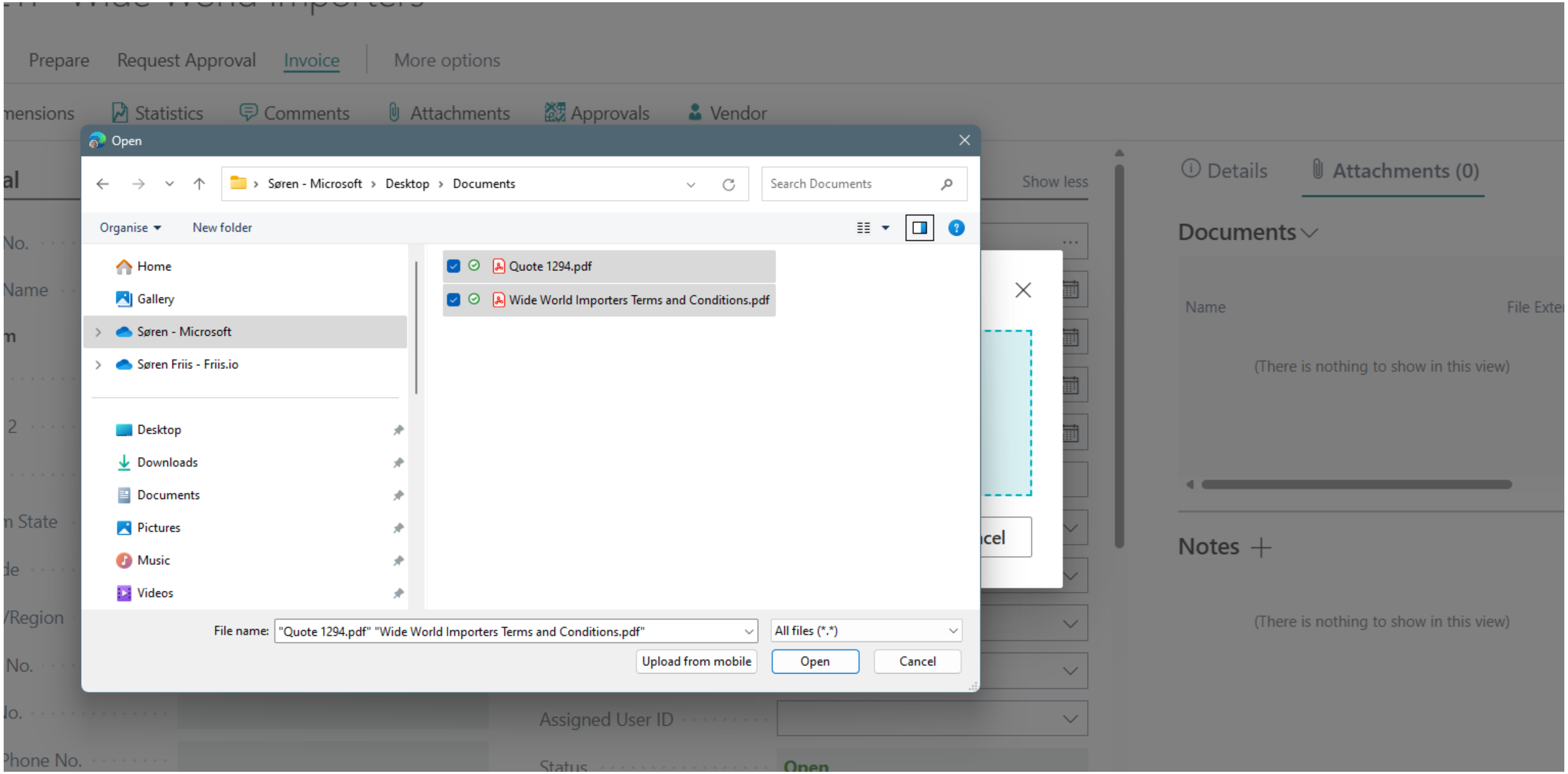

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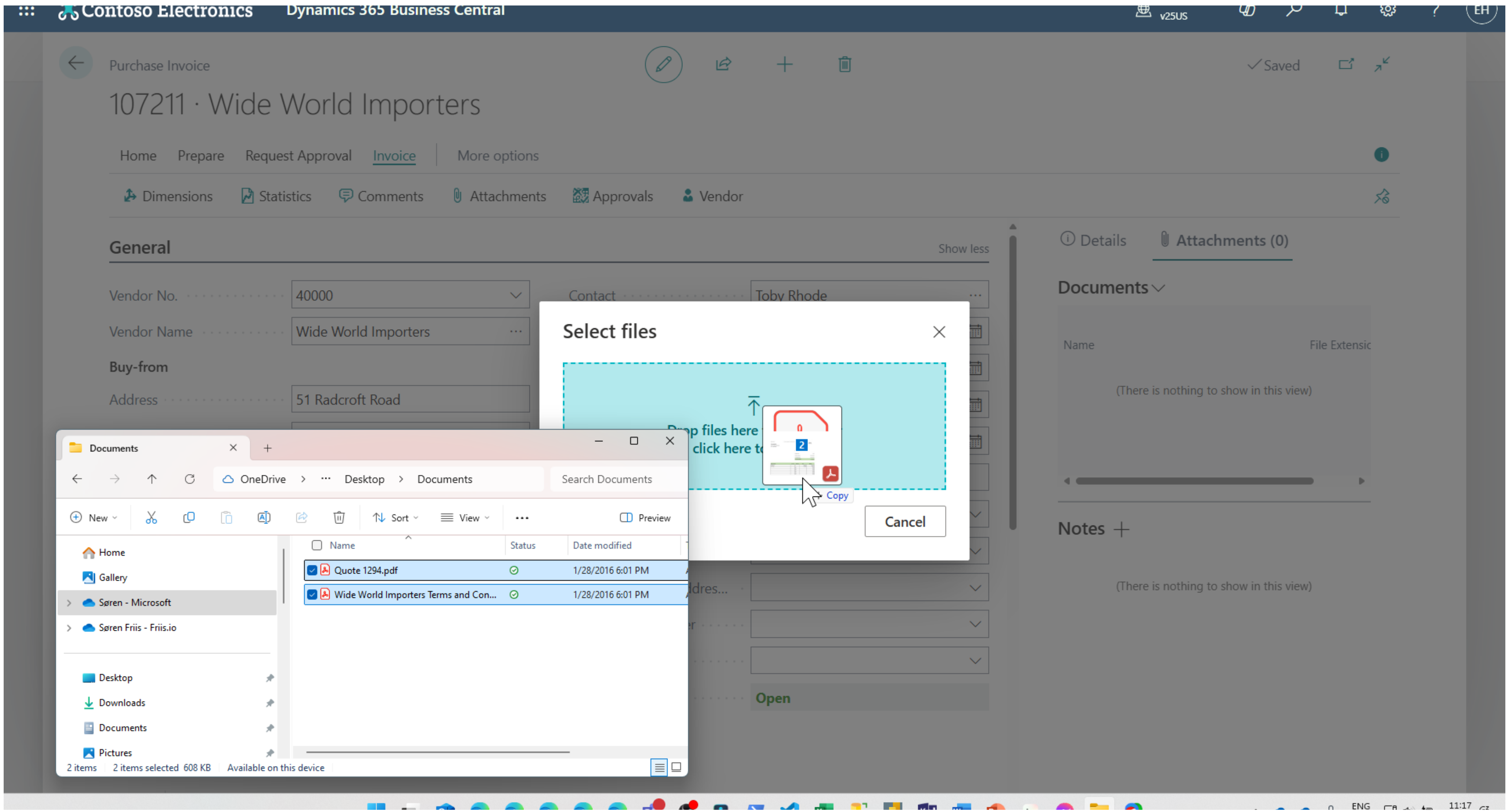

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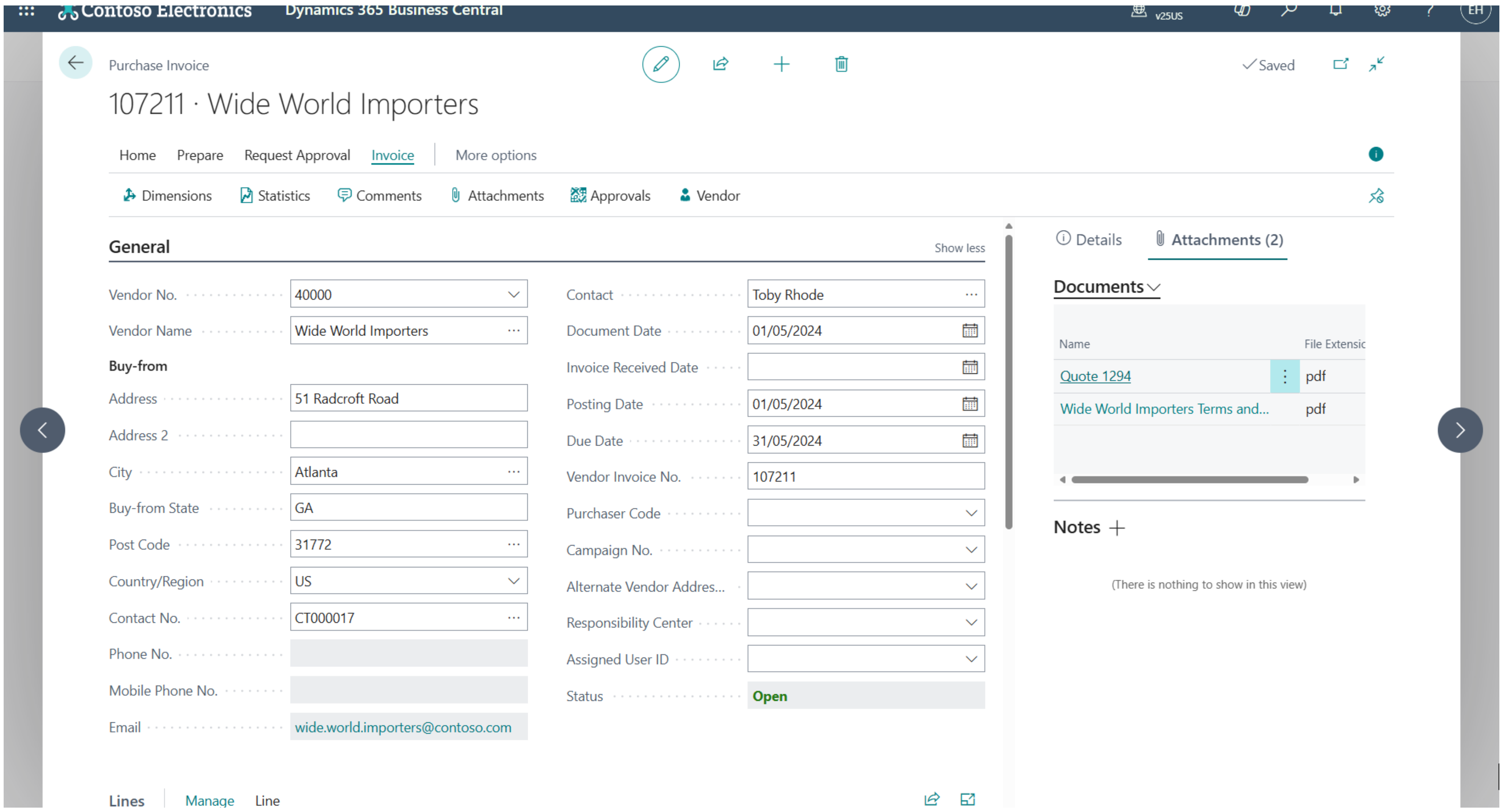

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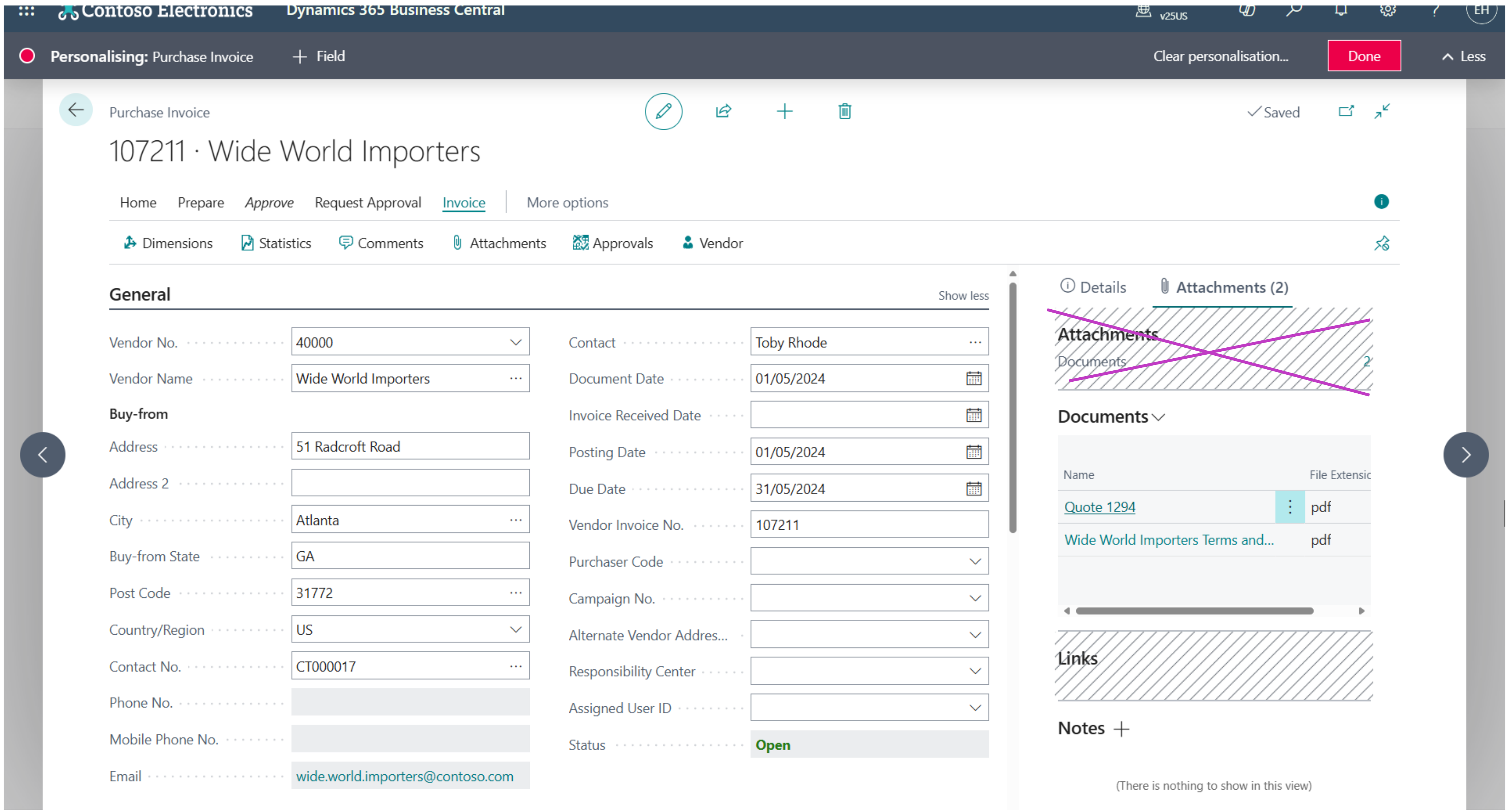
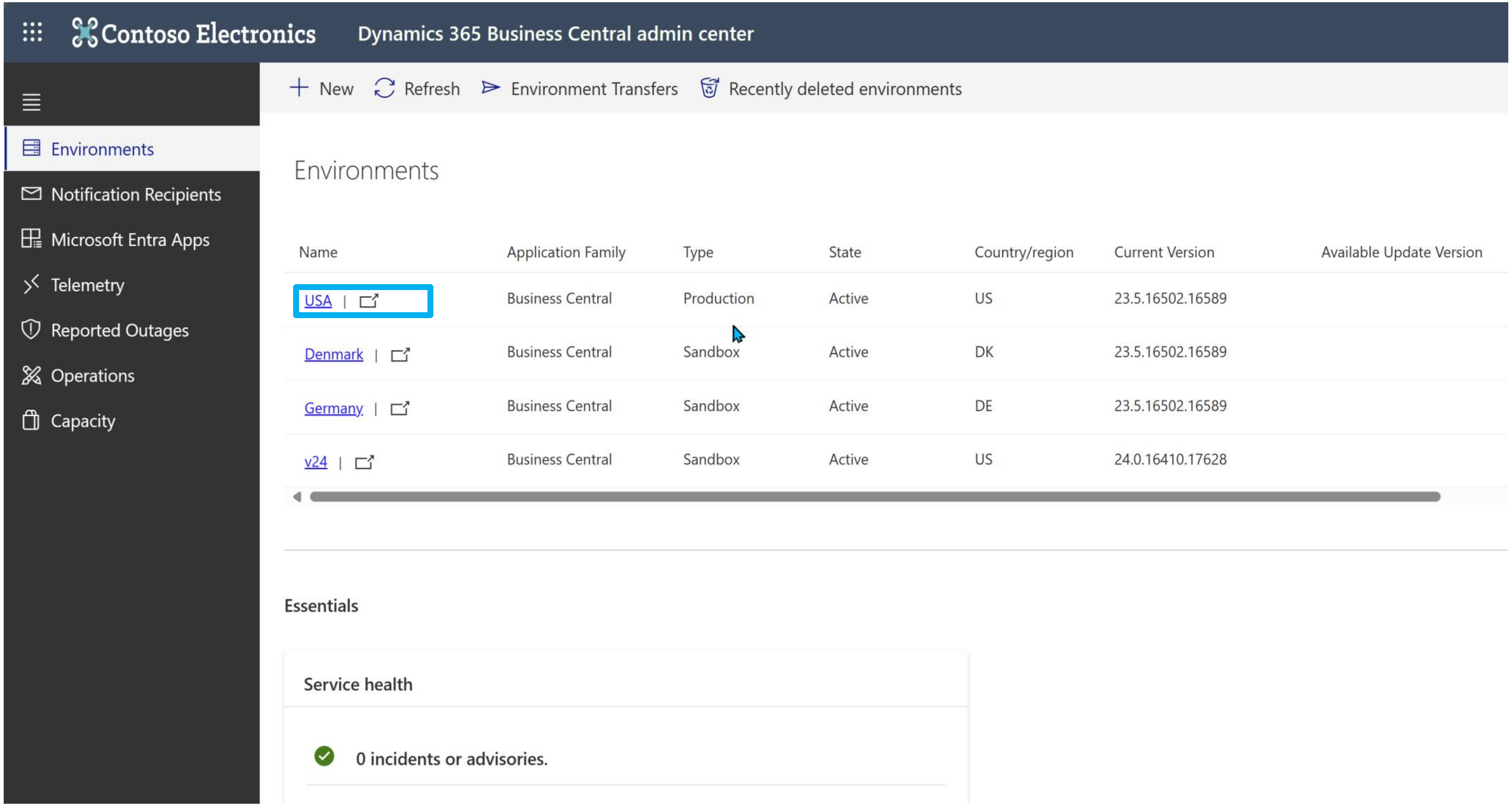
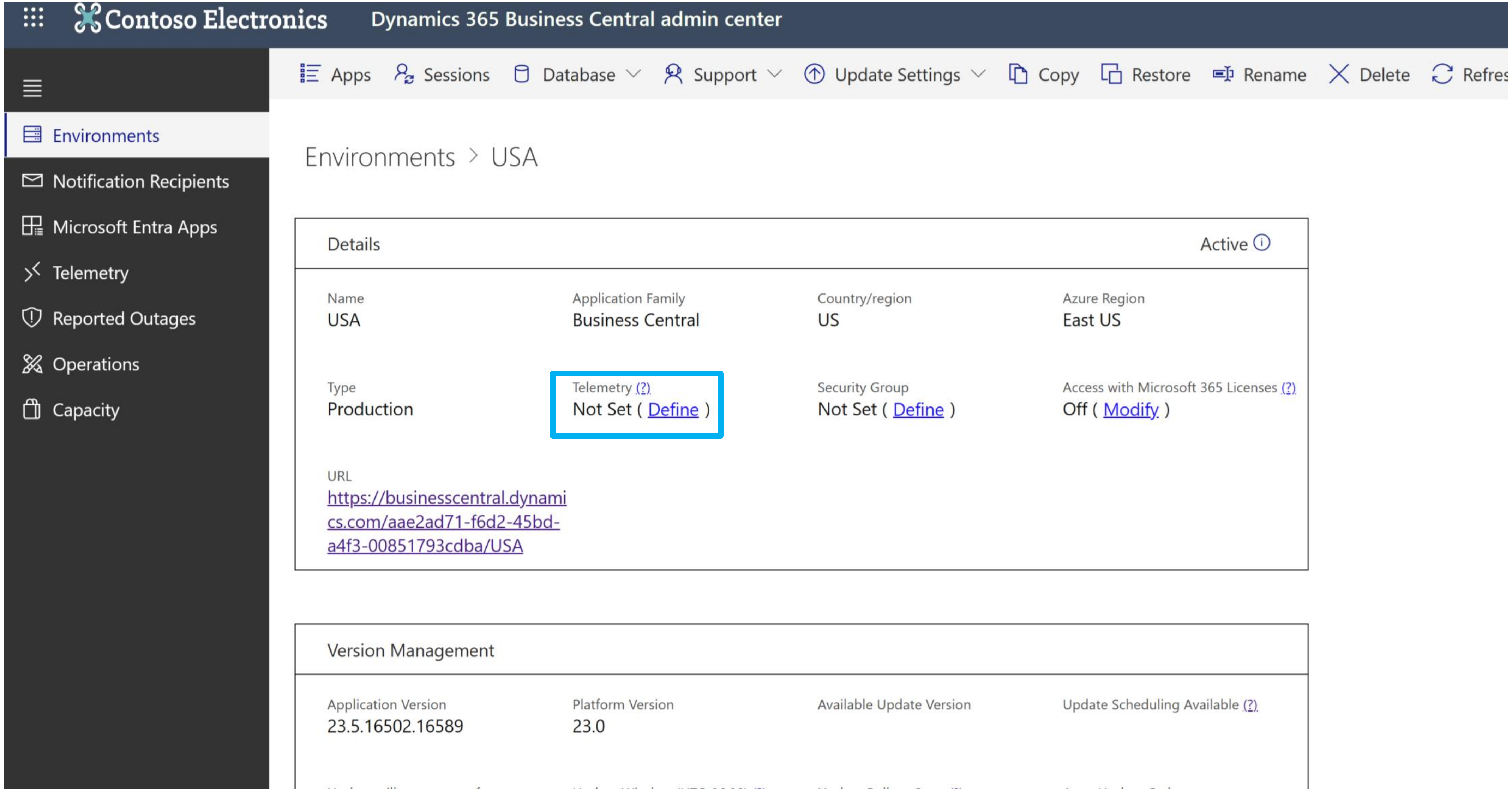


Tip # 22

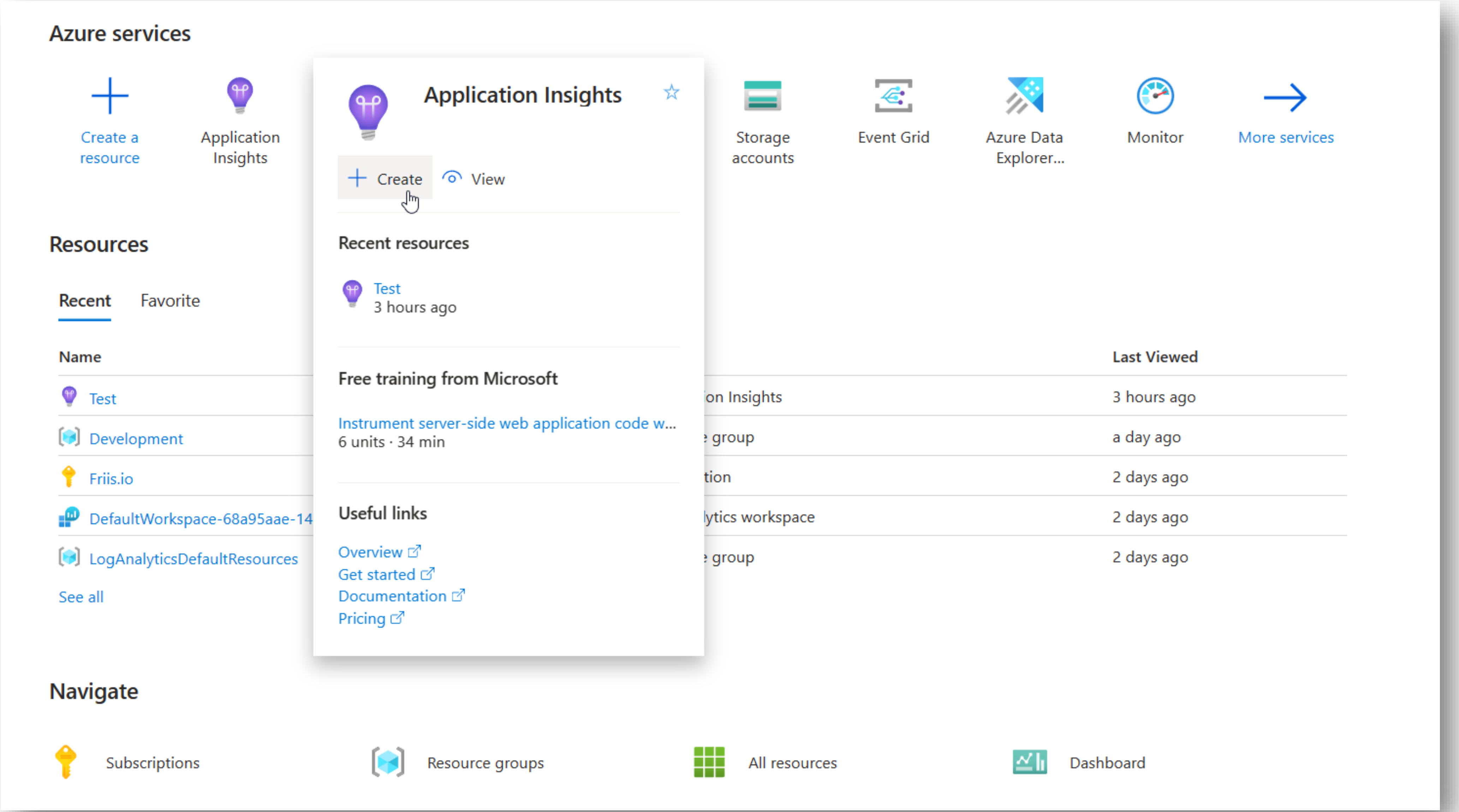
#22: Get insights into usage of BC – enable Application Insights



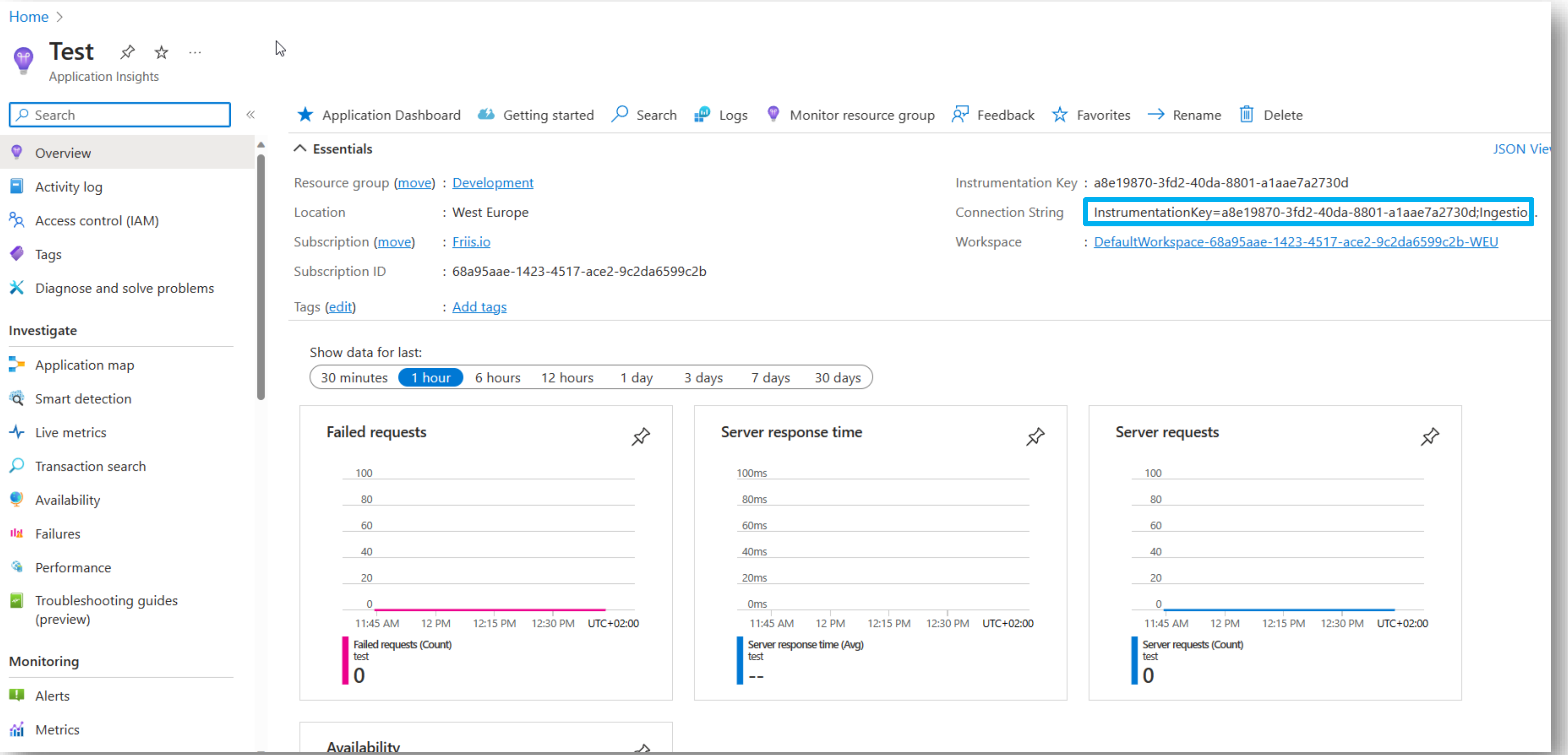
#22: Get insights into usage of BC – enable Application Insights



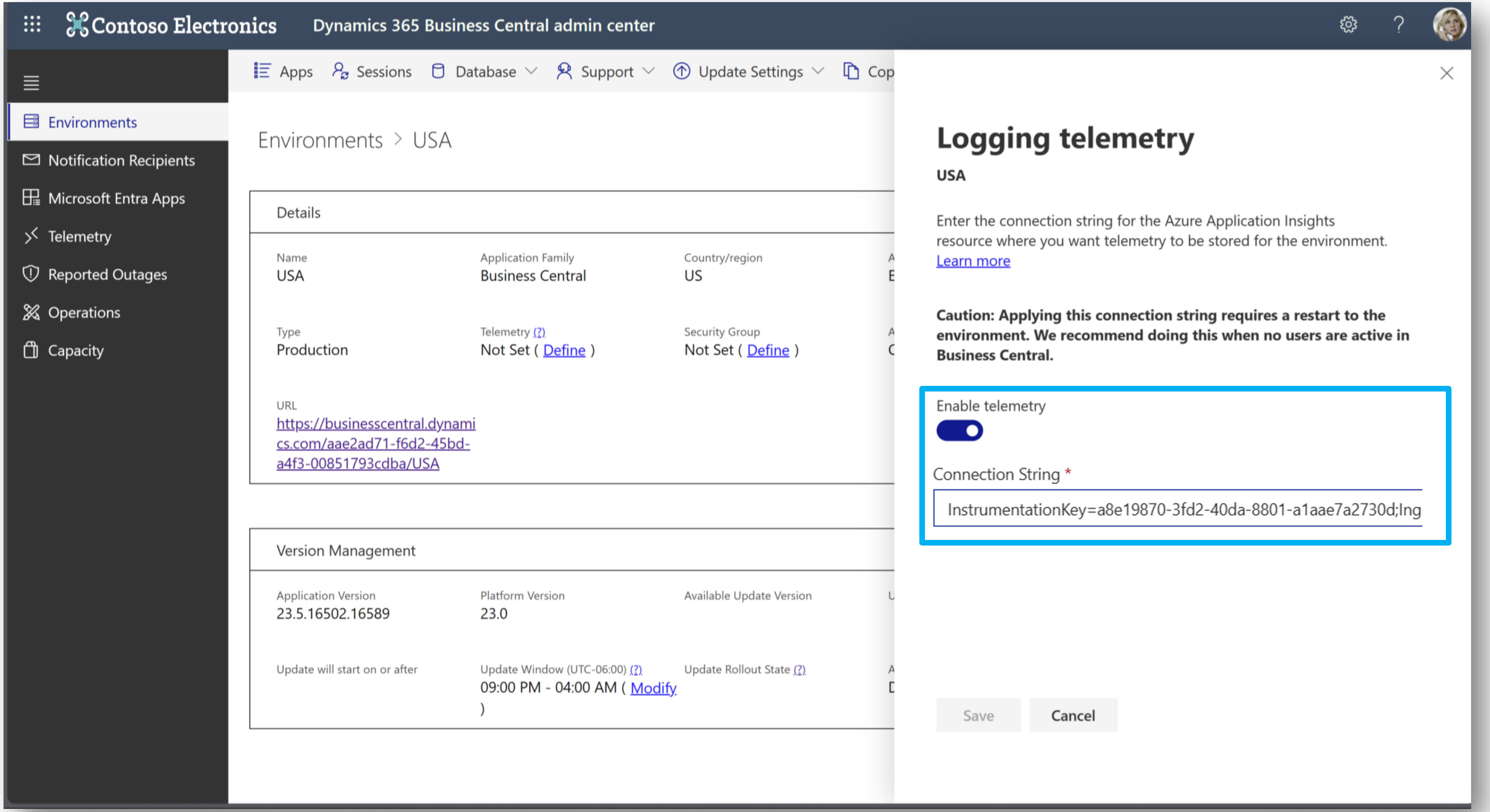
#22: Get insights into usage of BC – enable Application Insights



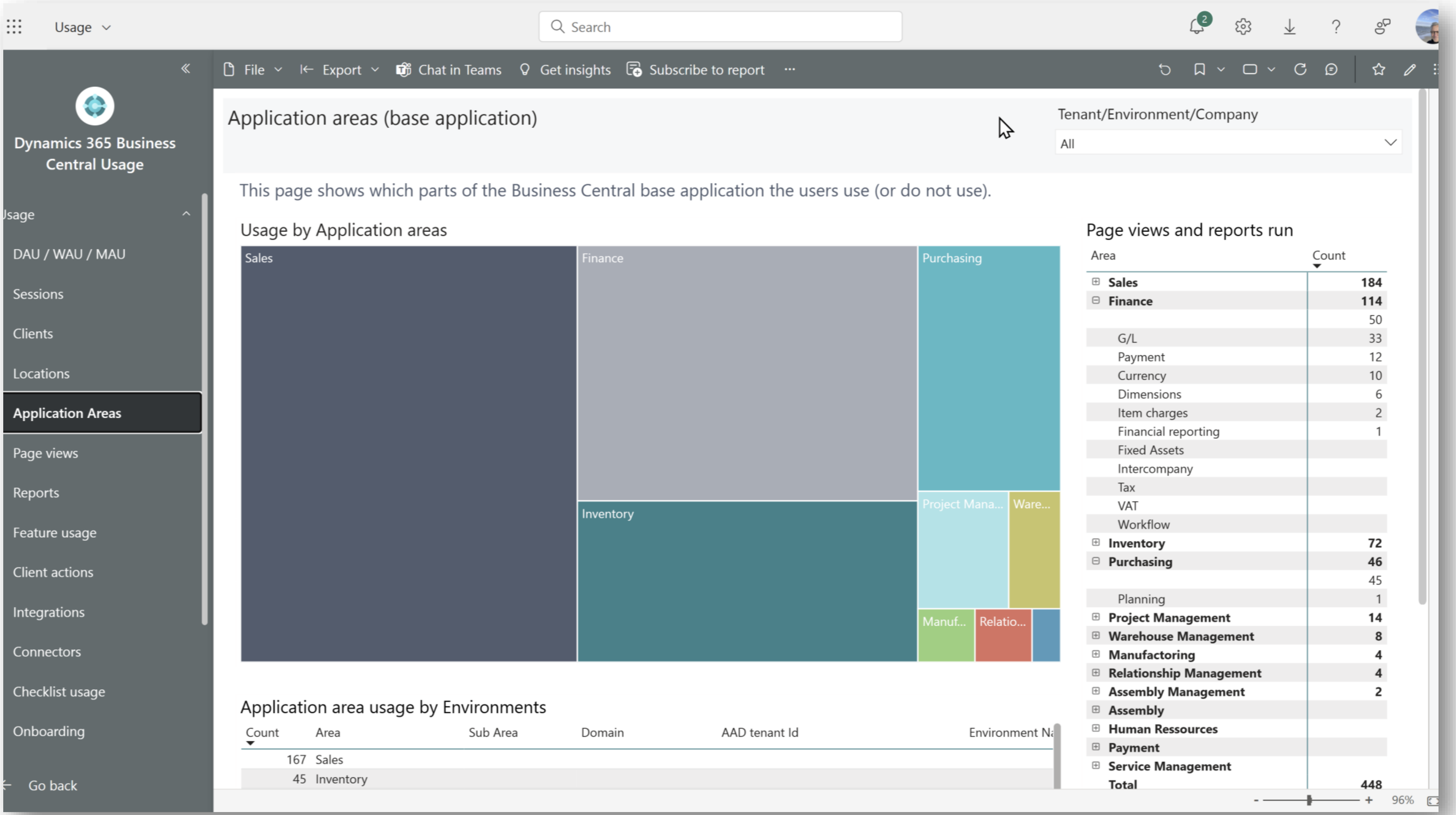
#22: Get insights into usage of BC – enable Application Insights



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

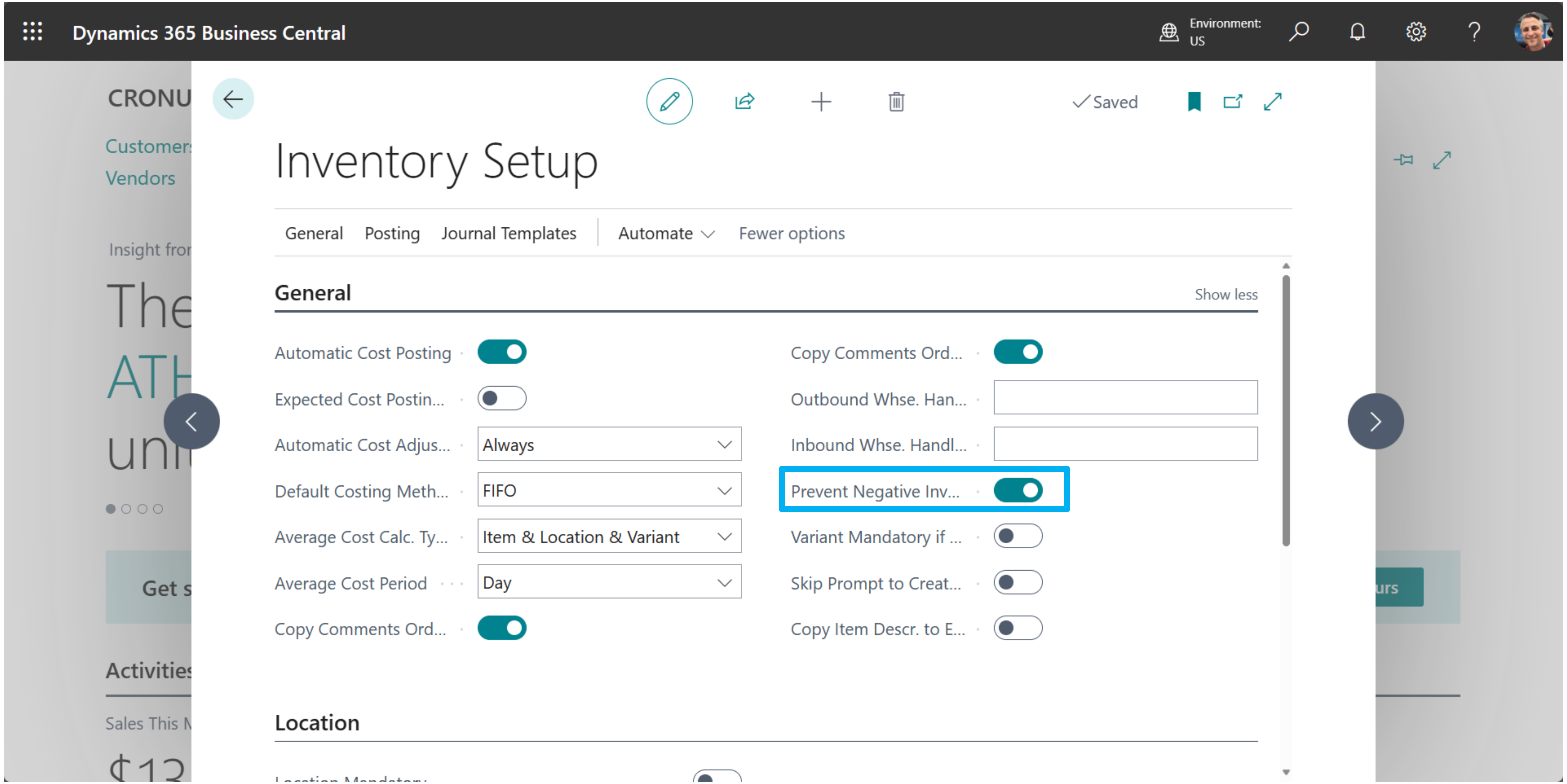


#22: Get insights into usage of BC – enable Application Insights

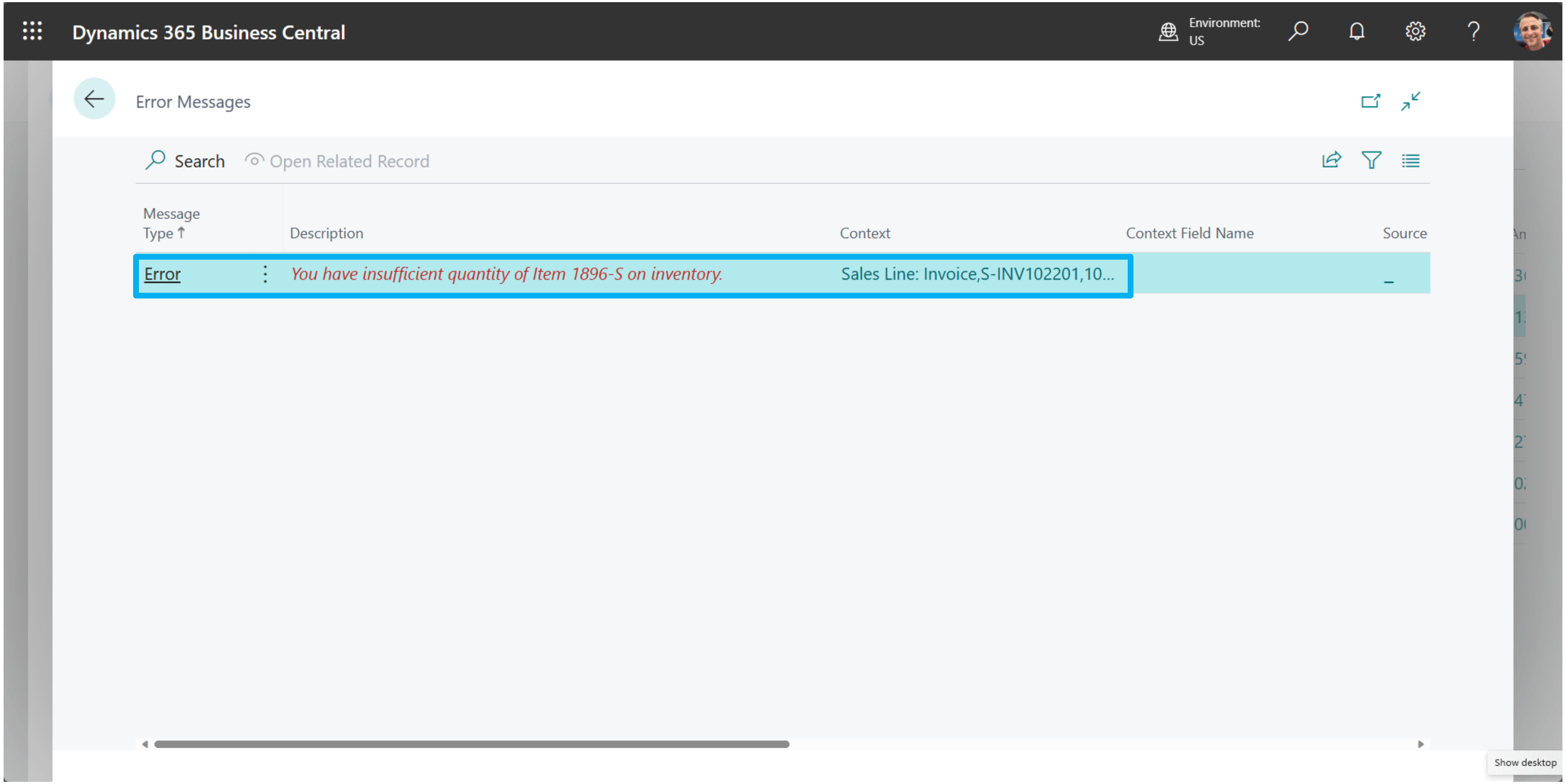


Tip # 23

#23: Prevent negative inventory

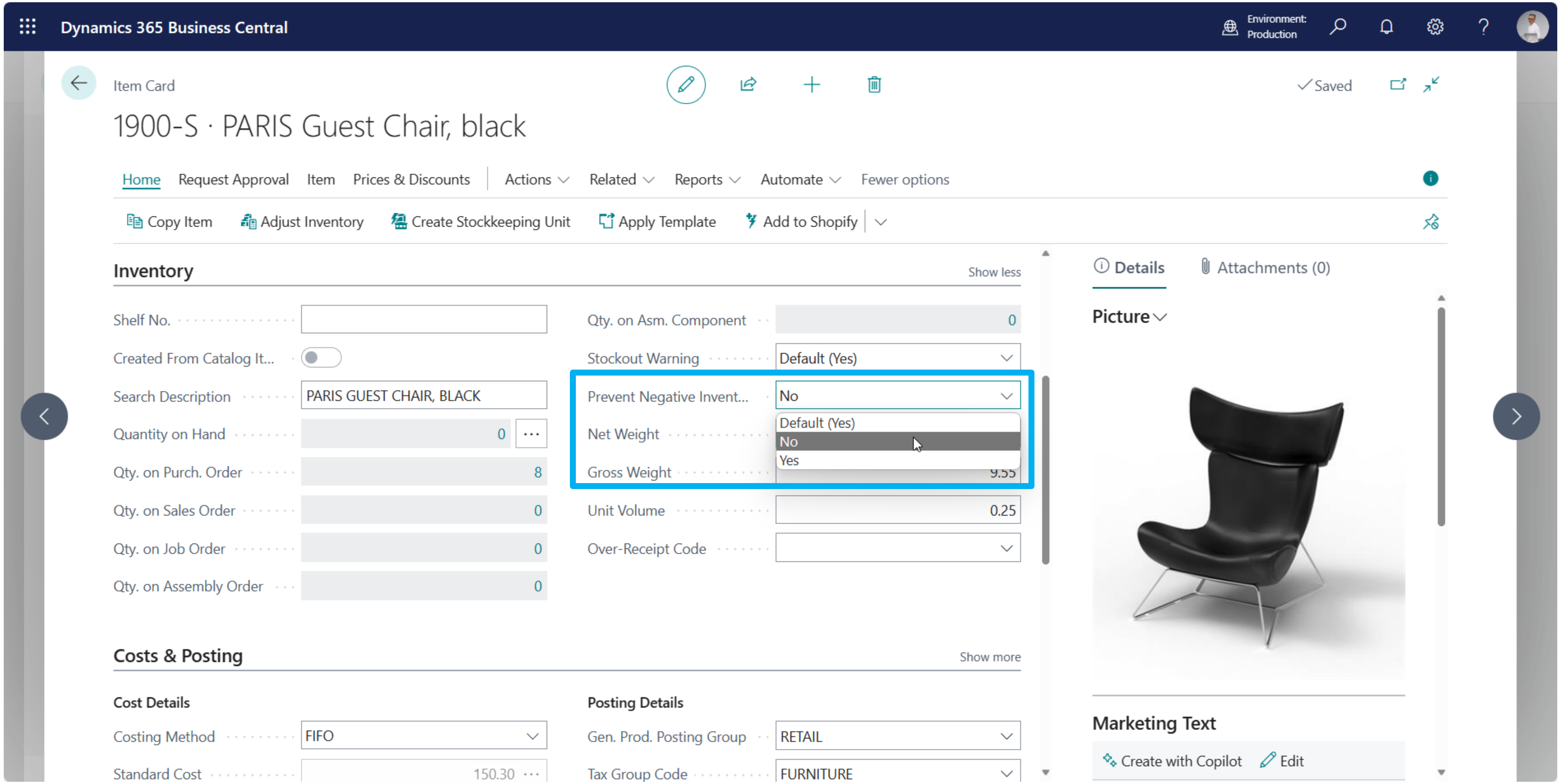


Example of blocking negative inventory at sales invoice posting



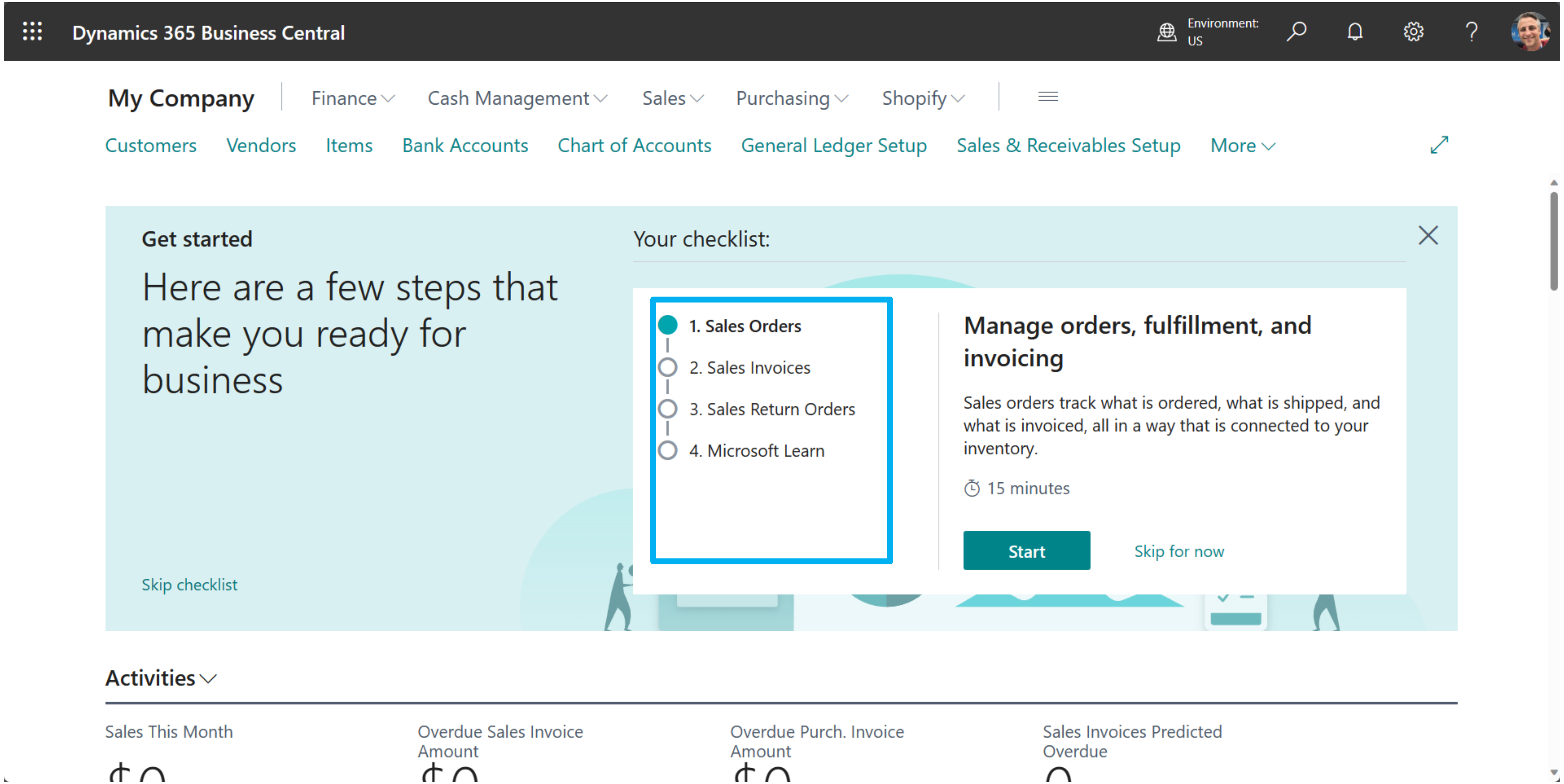
Override on the individual items

Most permissive wins

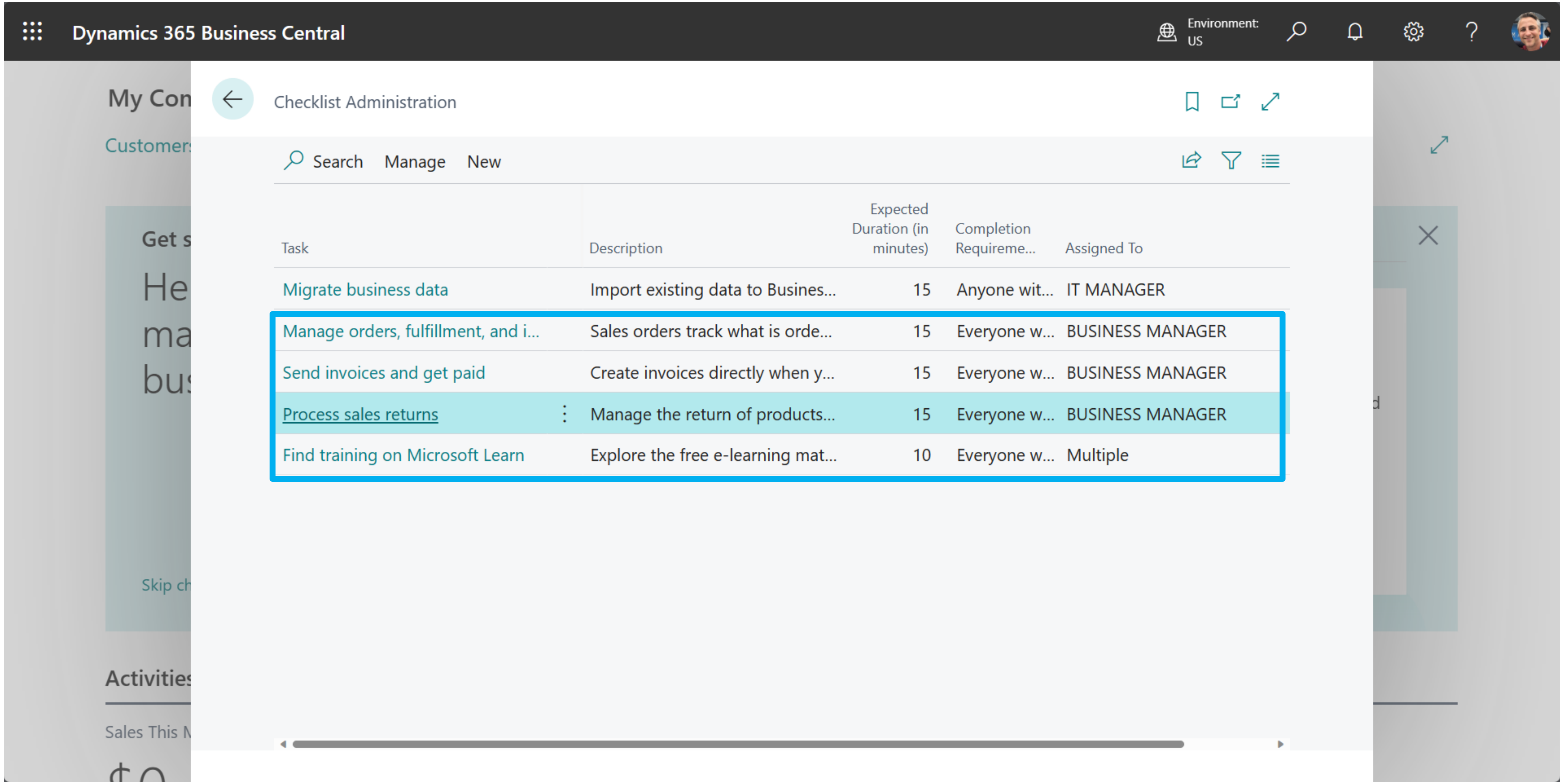


Tip # 24

#24: Define checklists for users and roles



#24: Define checklists for users and roles



Tip # 25

#25: Troubleshoot the Business Central online service connectivity

Navigate to:

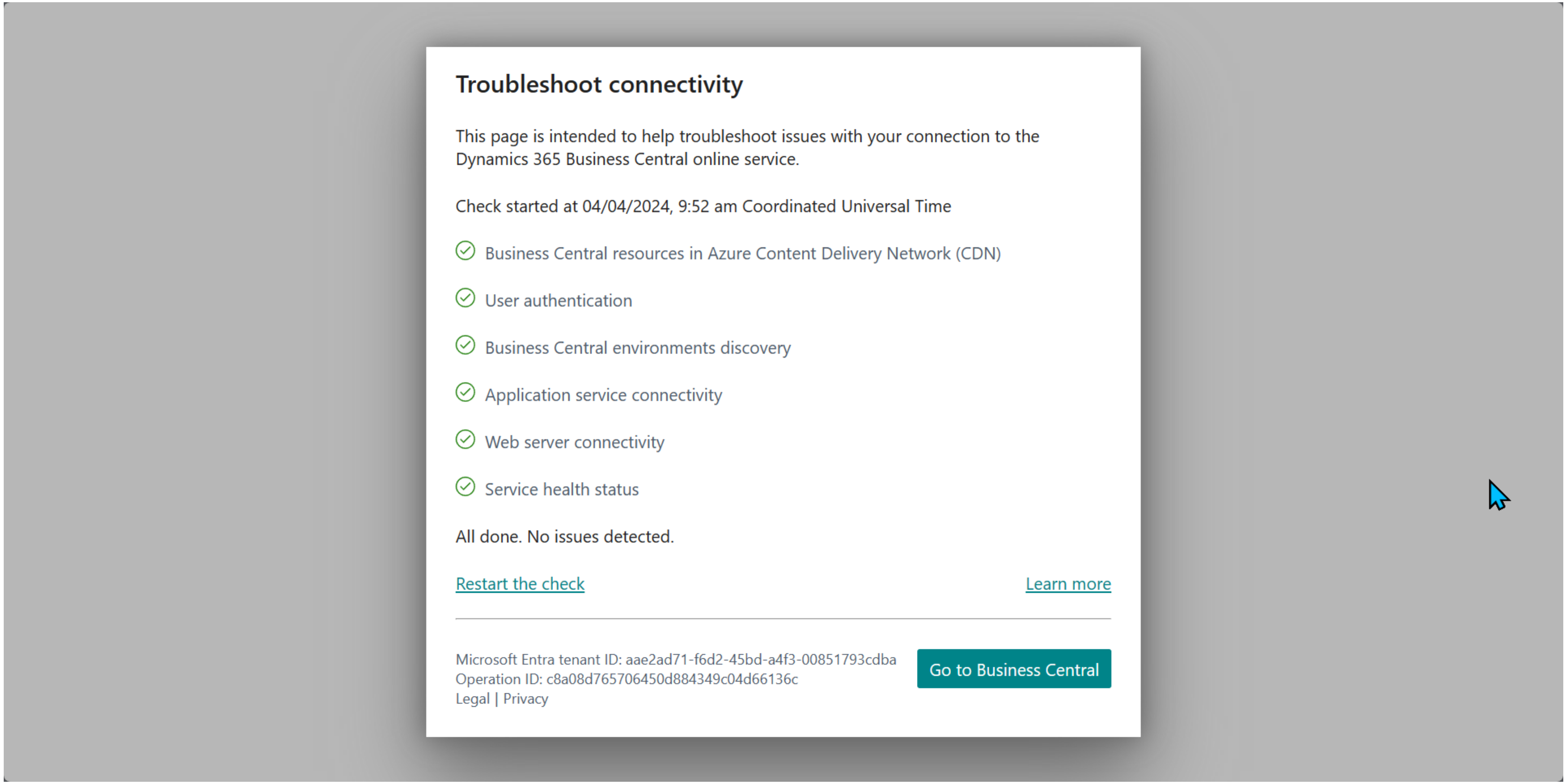
https://businesscentral.dynamics.com/connectivity

Or to:

https://aka.ms/bccp

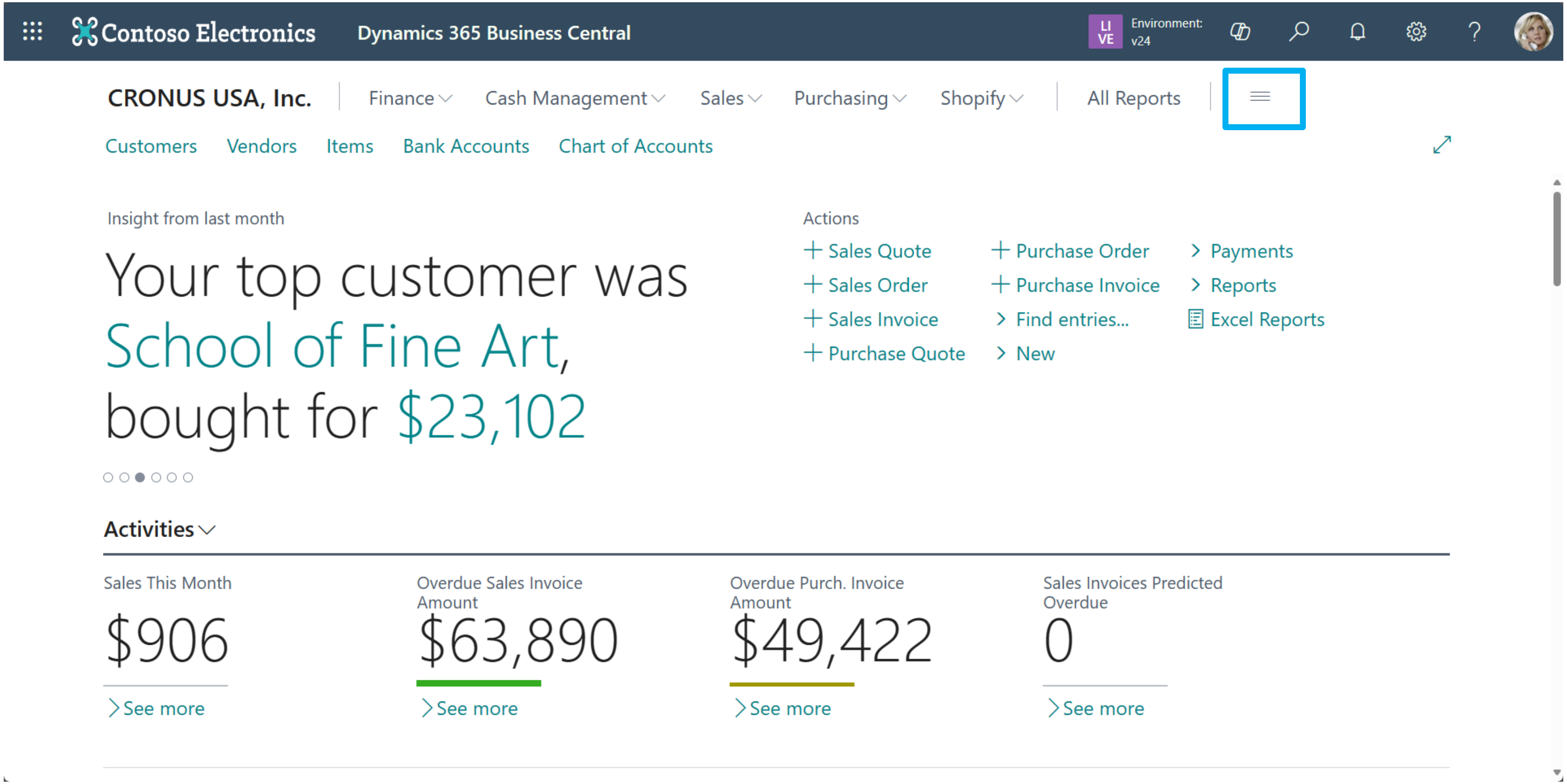
(short for Business Central Client Performance)

#25: Troubleshoot Business Central online connectivity

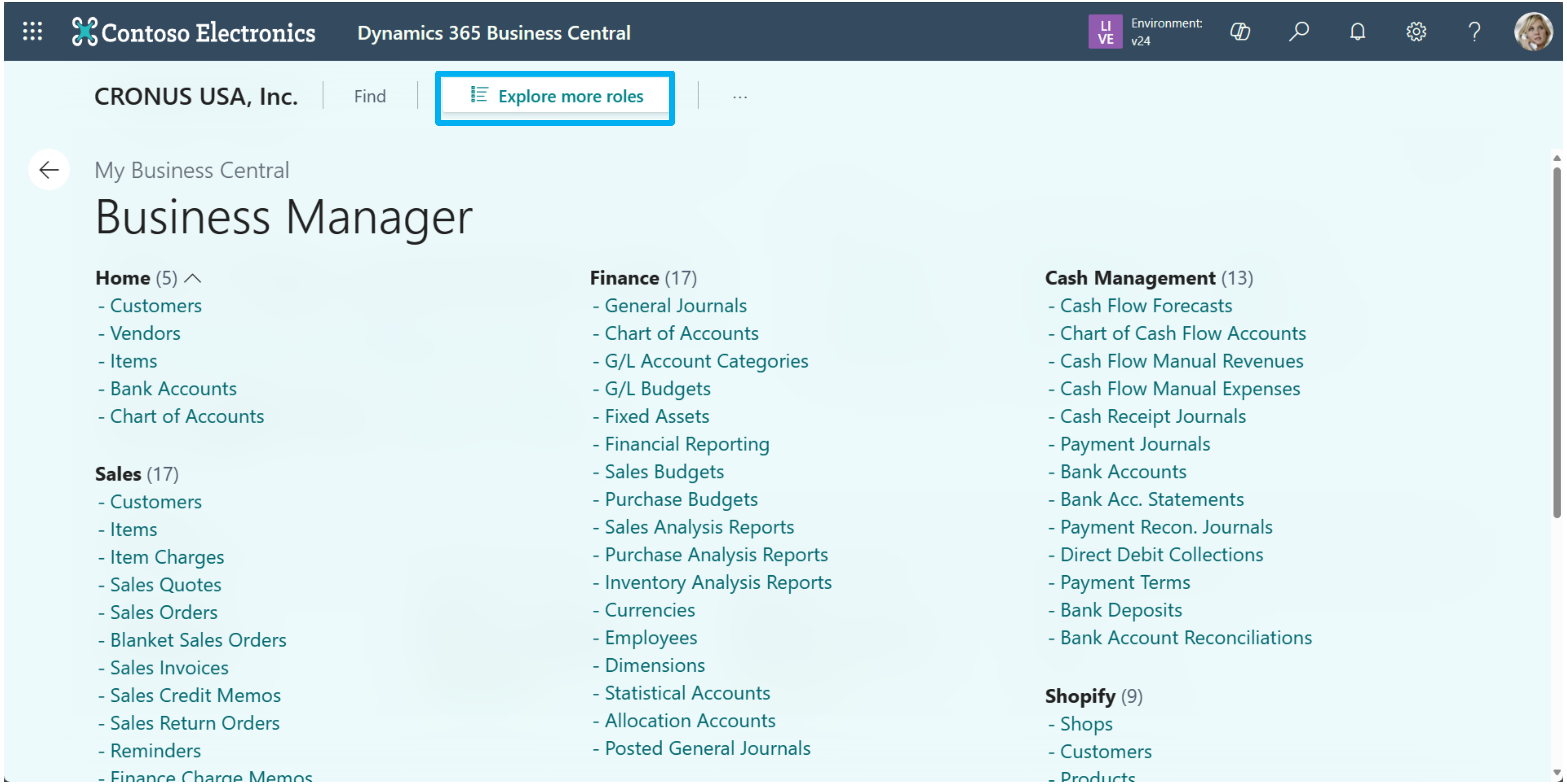


Tip # 26

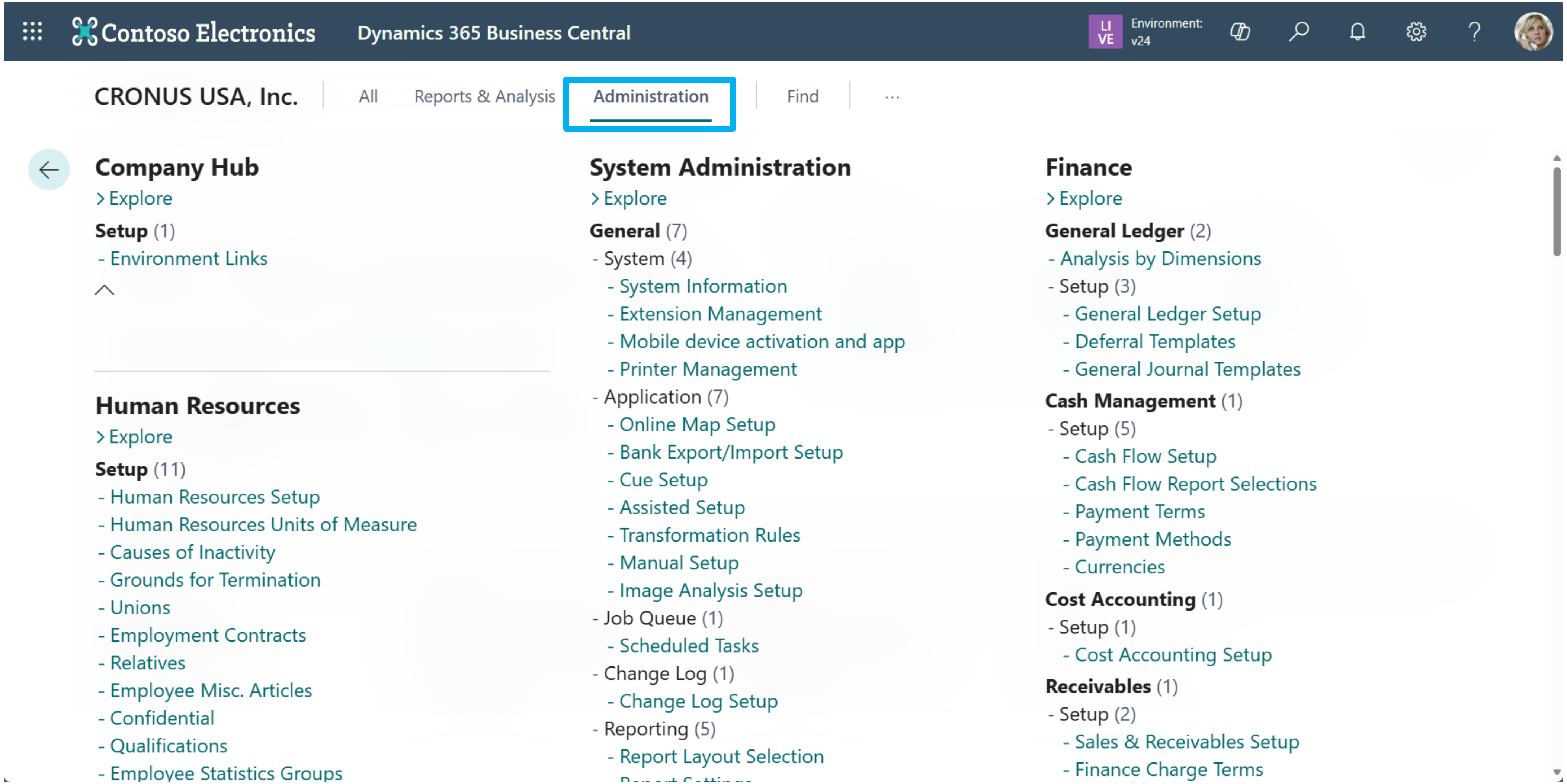
#26: Browse setup across functional areas with the Role Explorer



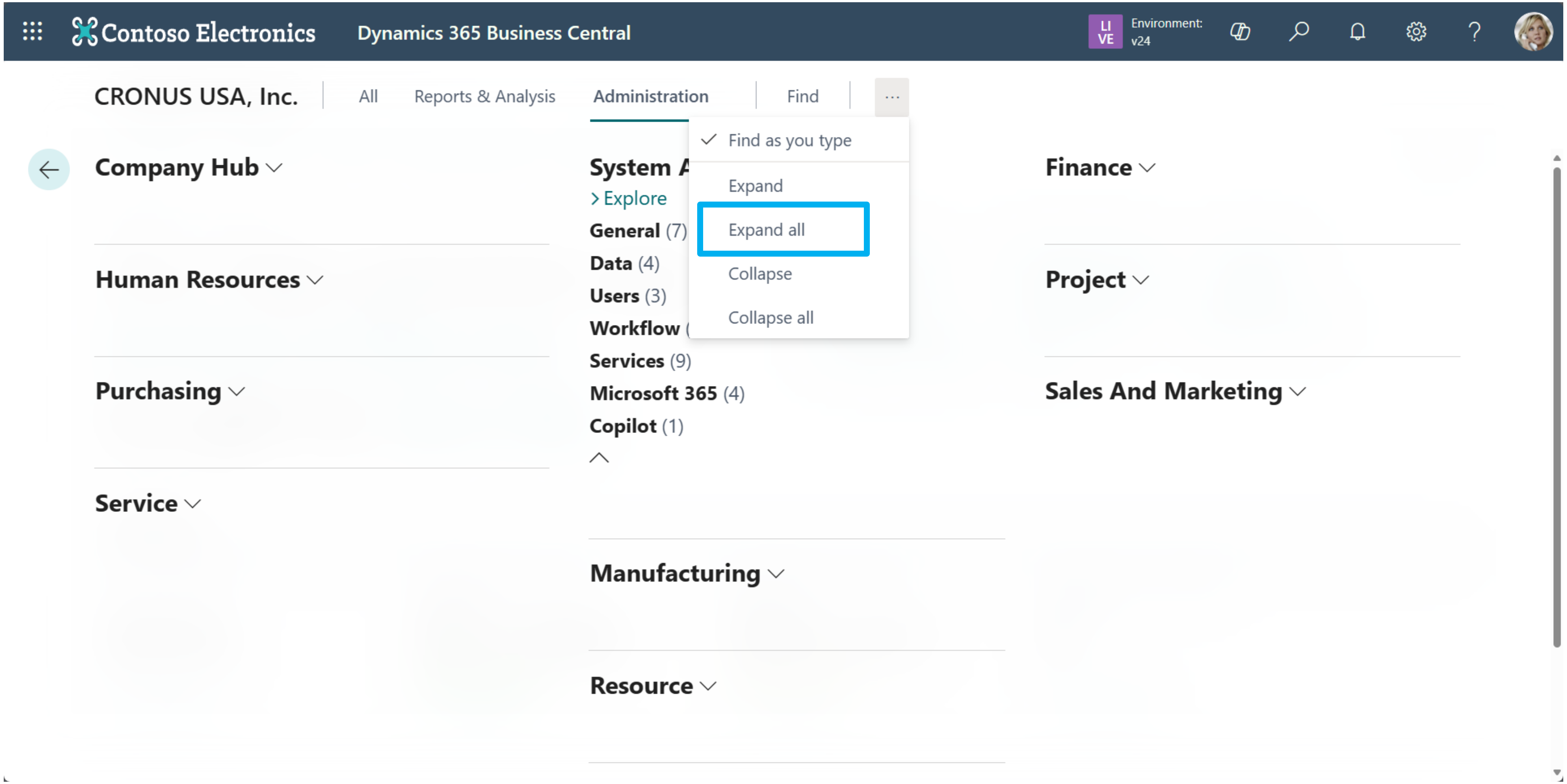
#26: Browse setup across functional areas with the Role Explorer



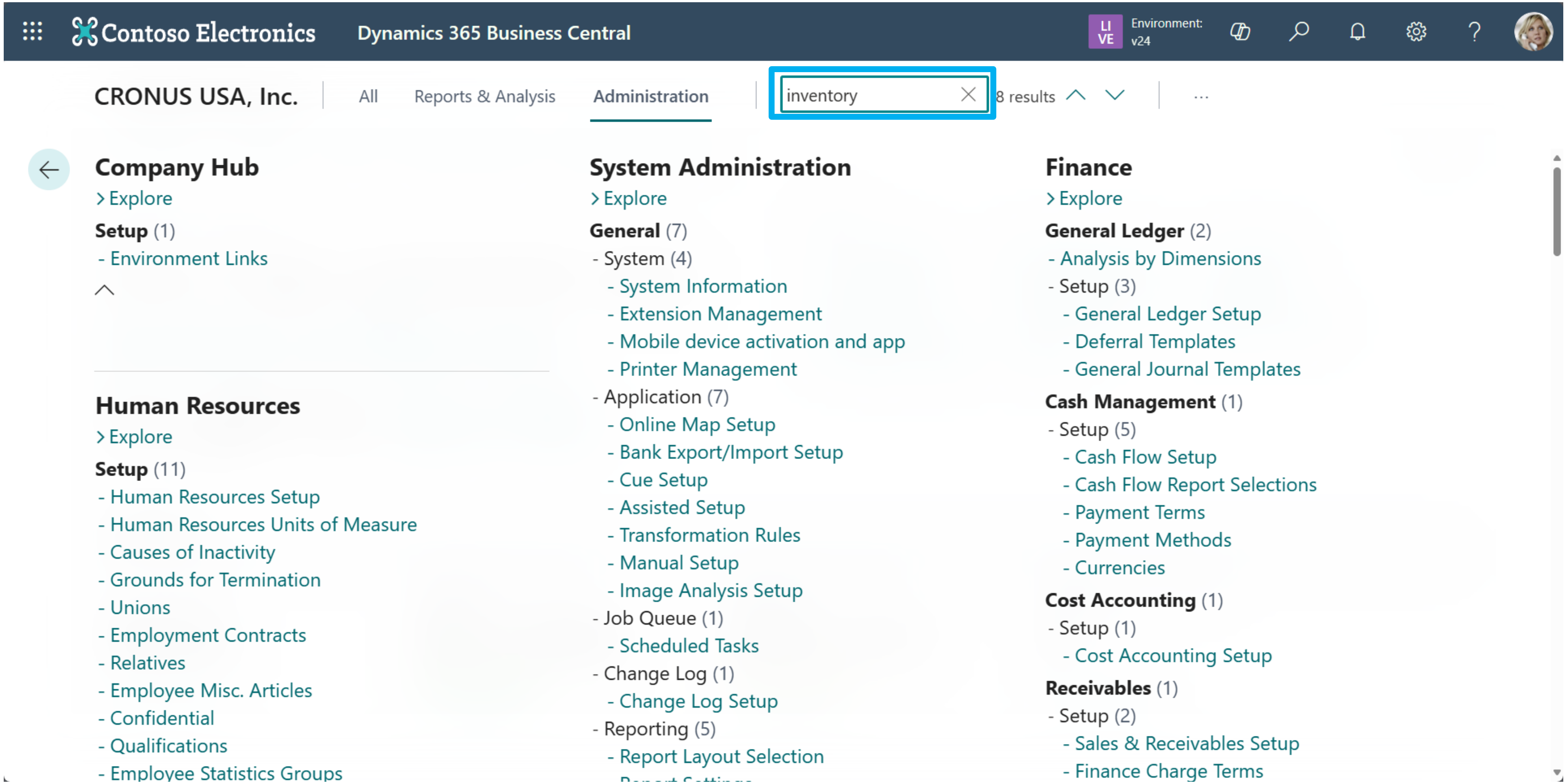
#26: Browse setup across functional areas with the Role Explorer



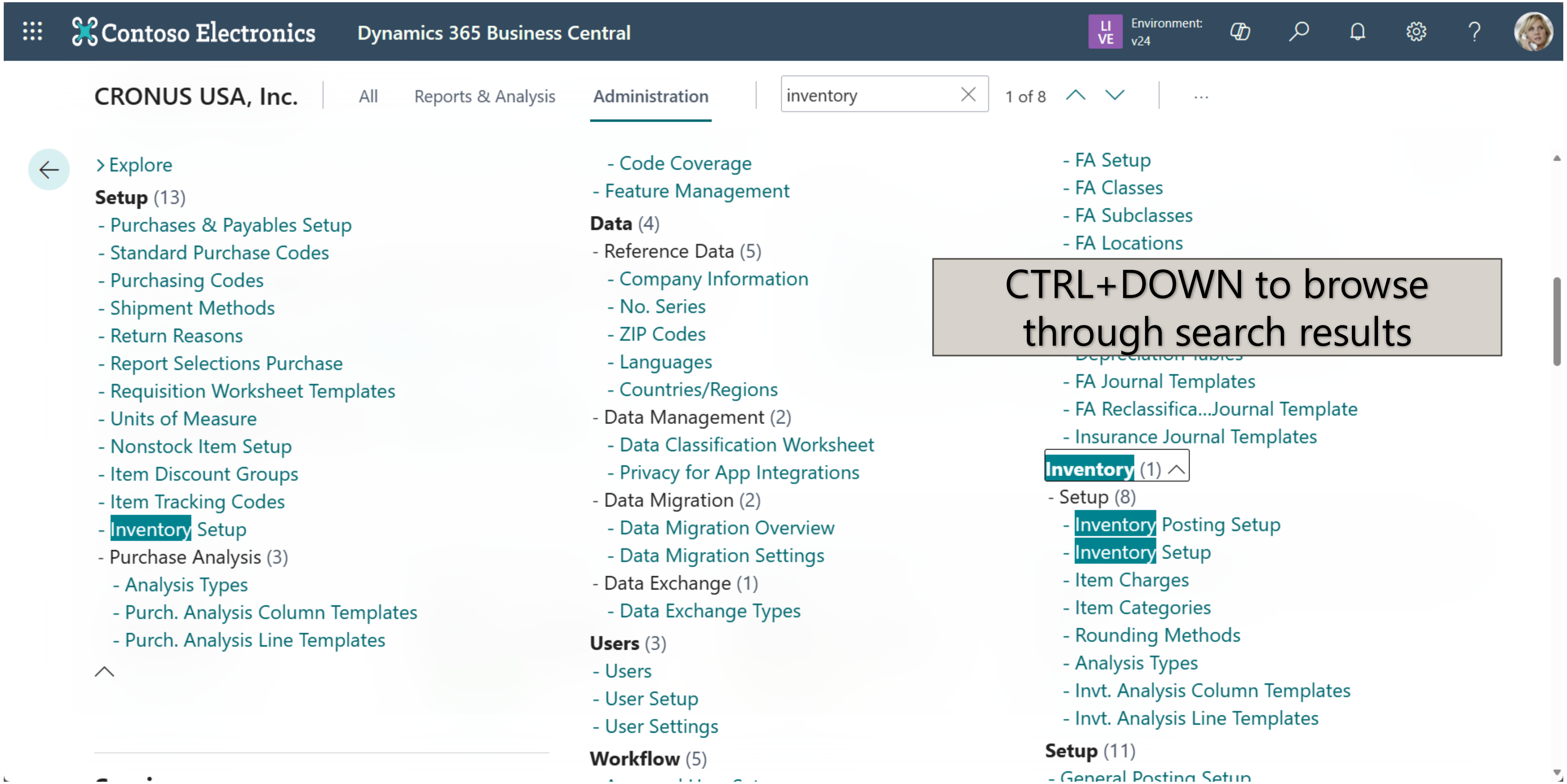
#26: Browse setup across functional areas with the Role Explorer



#26: Browse setup across functional areas with the Role Explorer



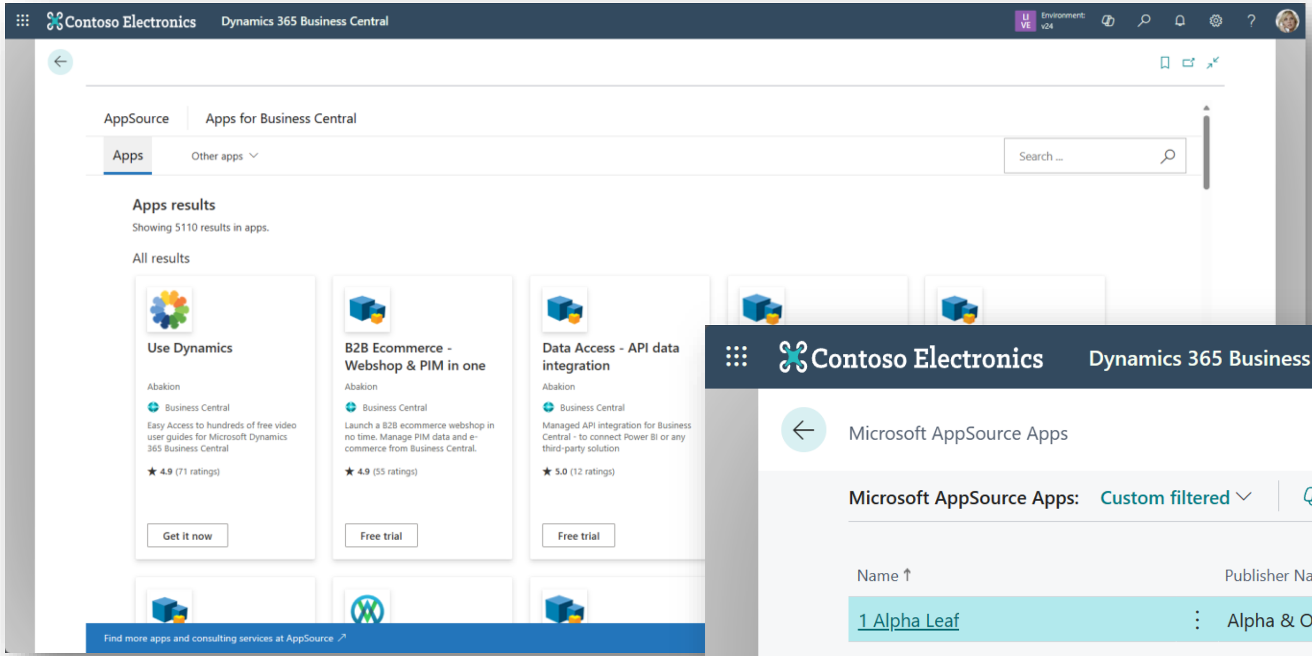
#26: Browse setup across functional areas with the Role Explorer

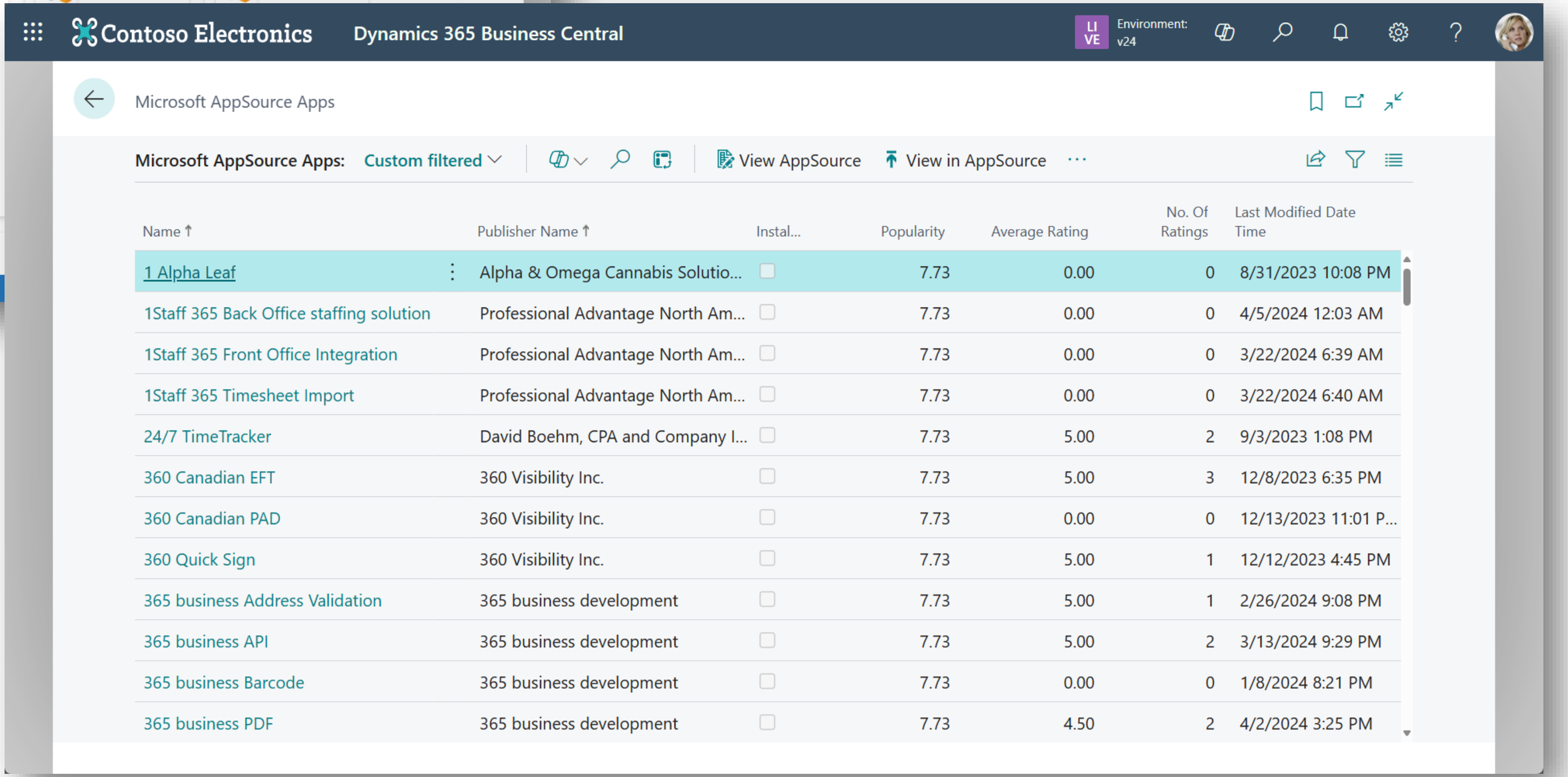


Tip # 27

#27: Find apps on Microsoft AppSource

Extension Marketplace is being deprecated

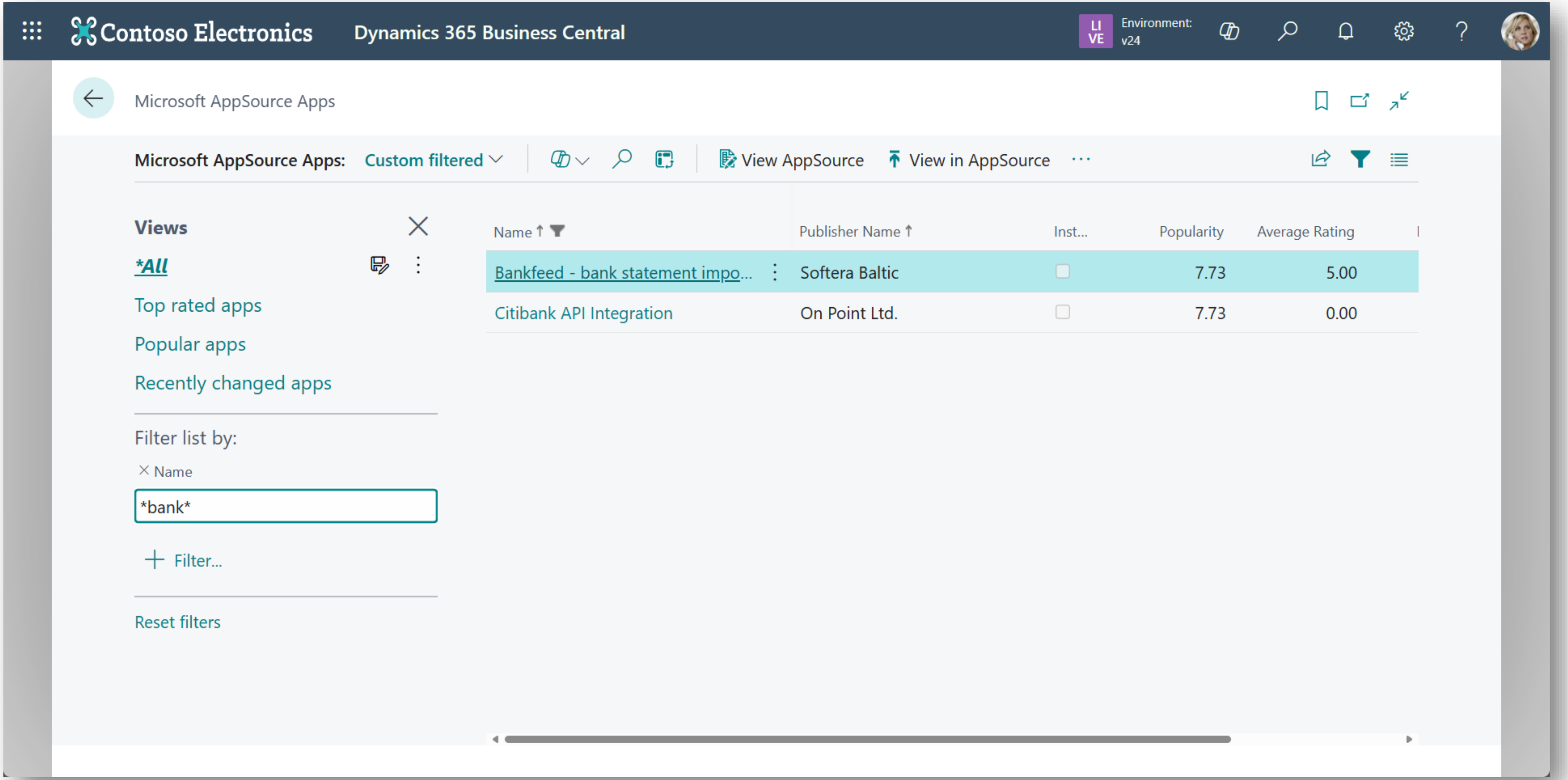




Replaced by Microsoft AppSource Apps

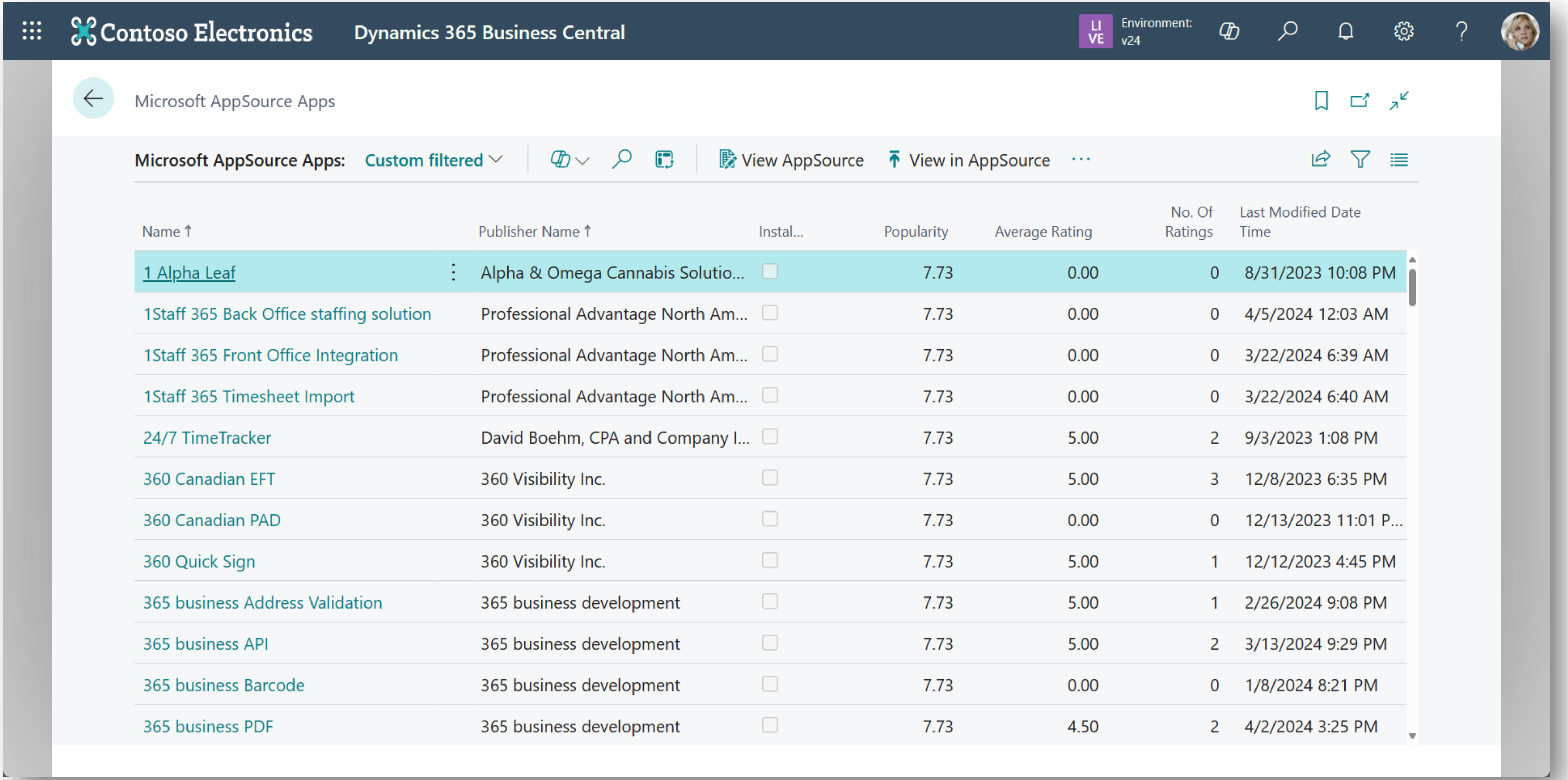
#27: Find apps on Microsoft AppSource

List supports normal Business Central filtering



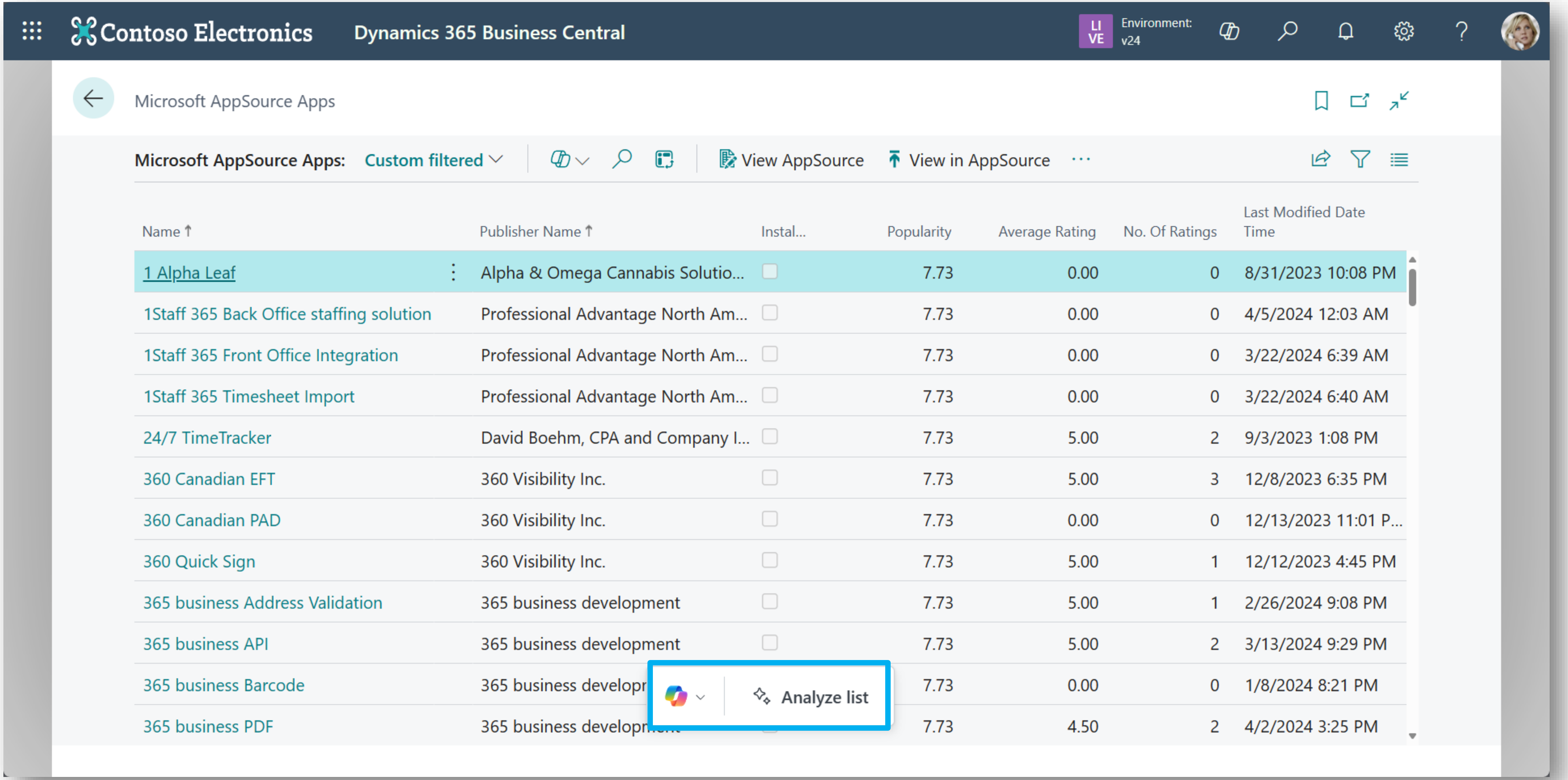
#27: Find apps on Microsoft AppSource

Filtered to apps that works on *this* environment localization



#27: Find apps on Microsoft AppSource

Use Copilot -> Analyze list to search for apps



Name ↑	Publisher Name ↑	Instal...	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solutio...	☐	7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North Am...	☐	7.73	0.00	0	4/5/2024 12:03 AM
1Staff 365 Front Office Integration	Professional Advantage North Am...	☐	7.73	0.00	0	3/22/2024 6:39 AM
1Staff 365 Timesheet Import	Professional Advantage North Am...	☐	7.73	0.00	0	3/22/2024 6:40 AM
24/7 TimeTracker	David Boehm, CPA and Company I...	☐	7.73	5.00	2	9/3/2023 1:08 PM
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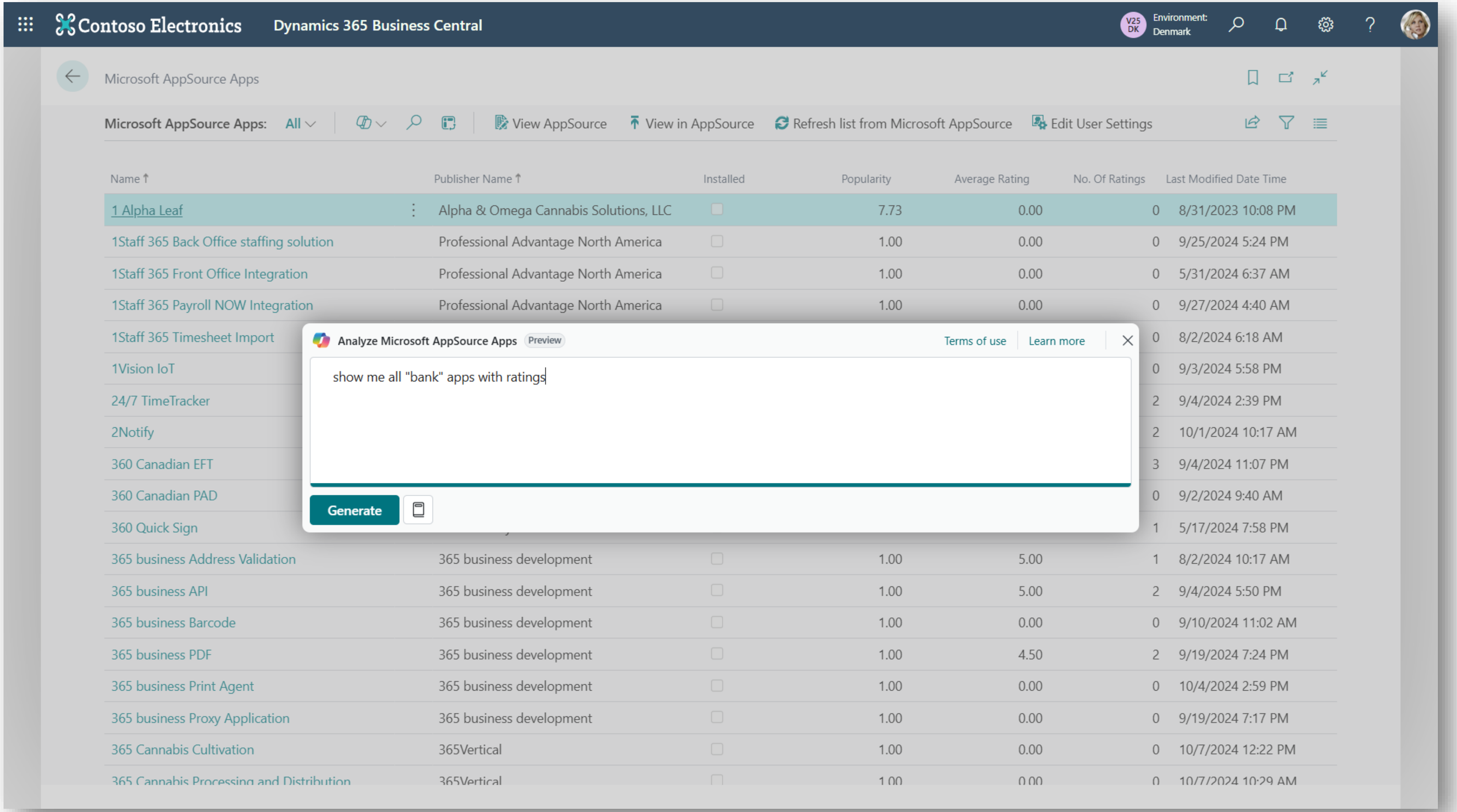
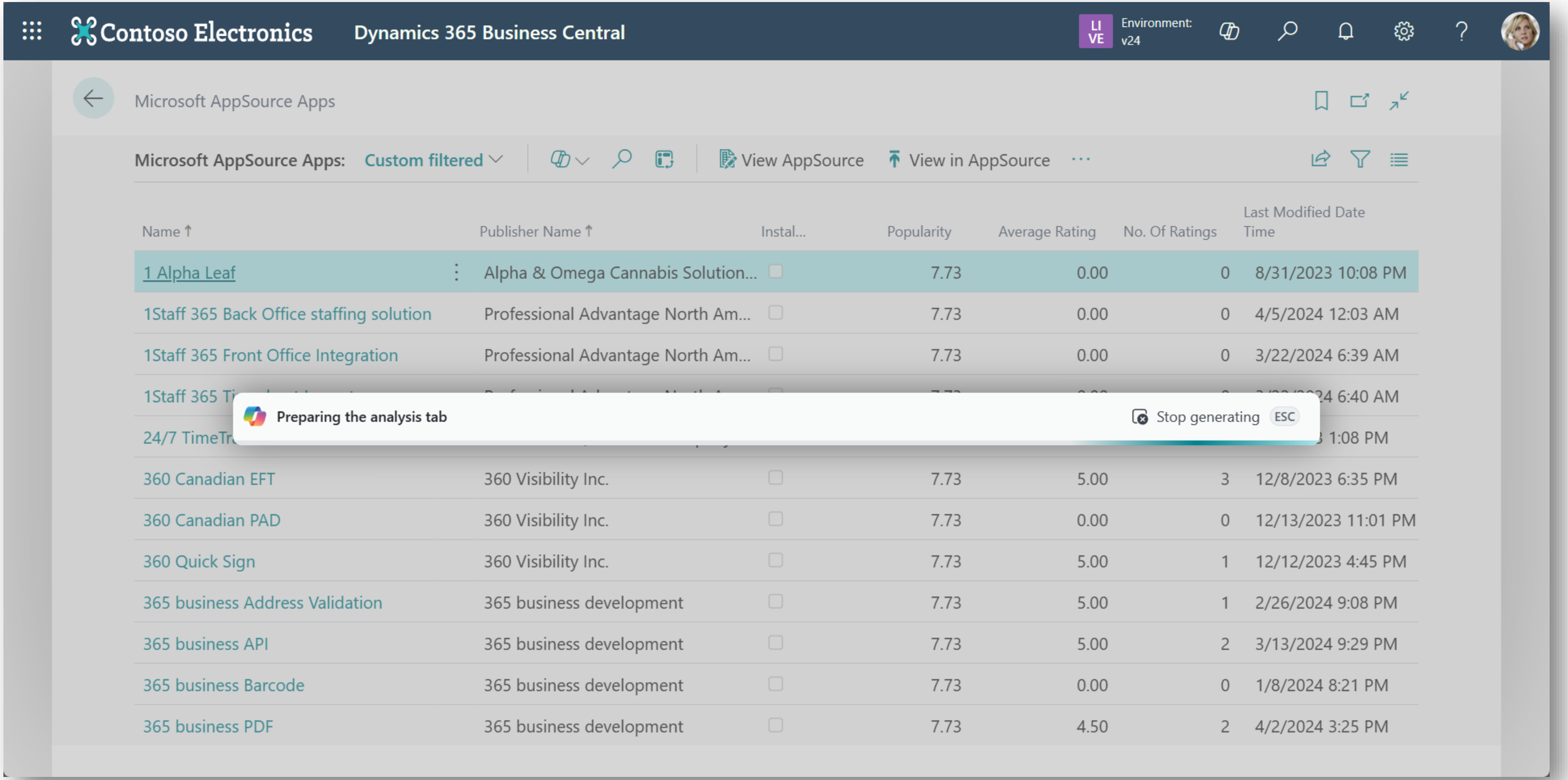
365 business PDF	365 business developm...		7.73	4.50	2	4/2/2024 3:25 PM

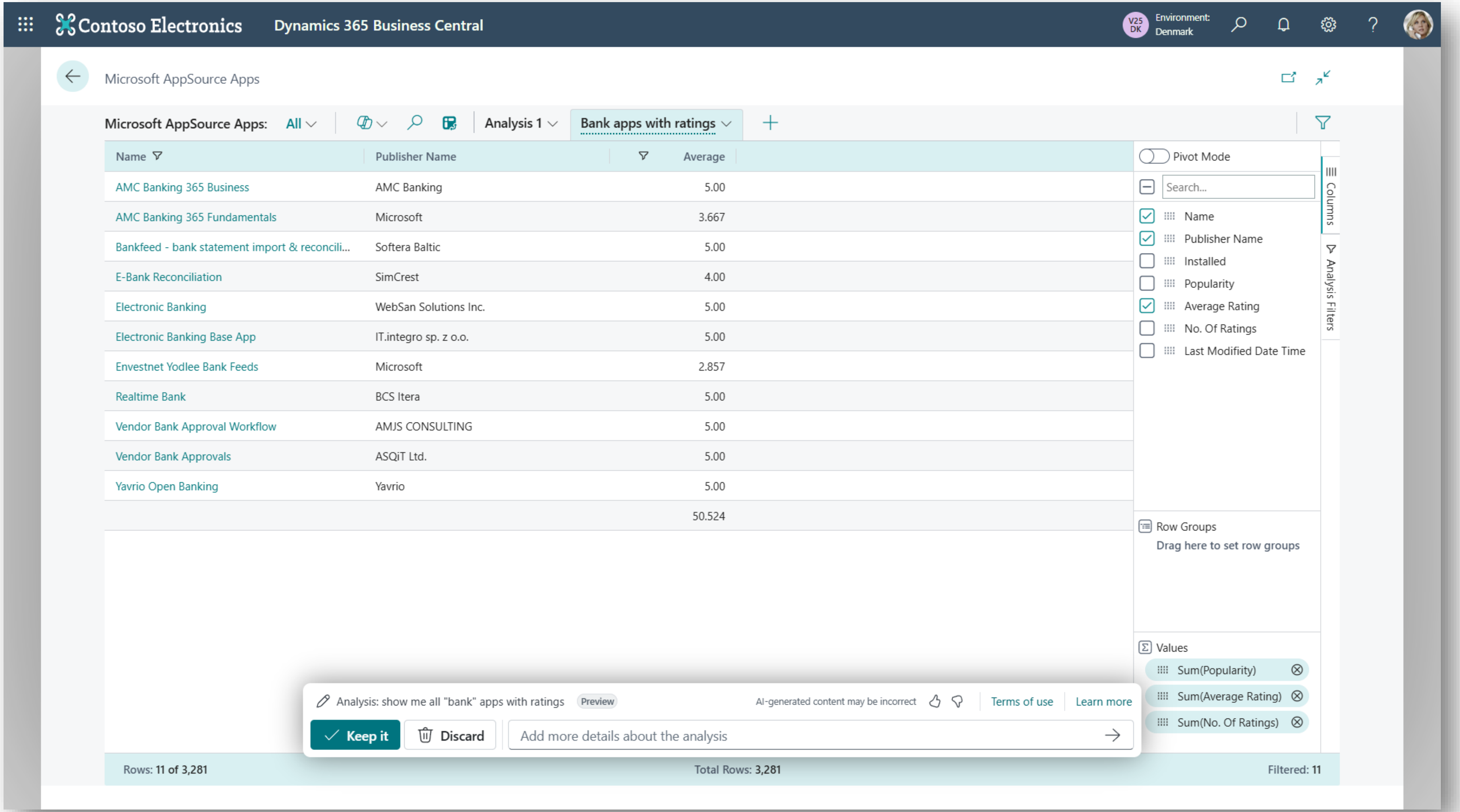
#27: Find apps on Microsoft AppSource



#27: Find apps on Microsoft AppSource

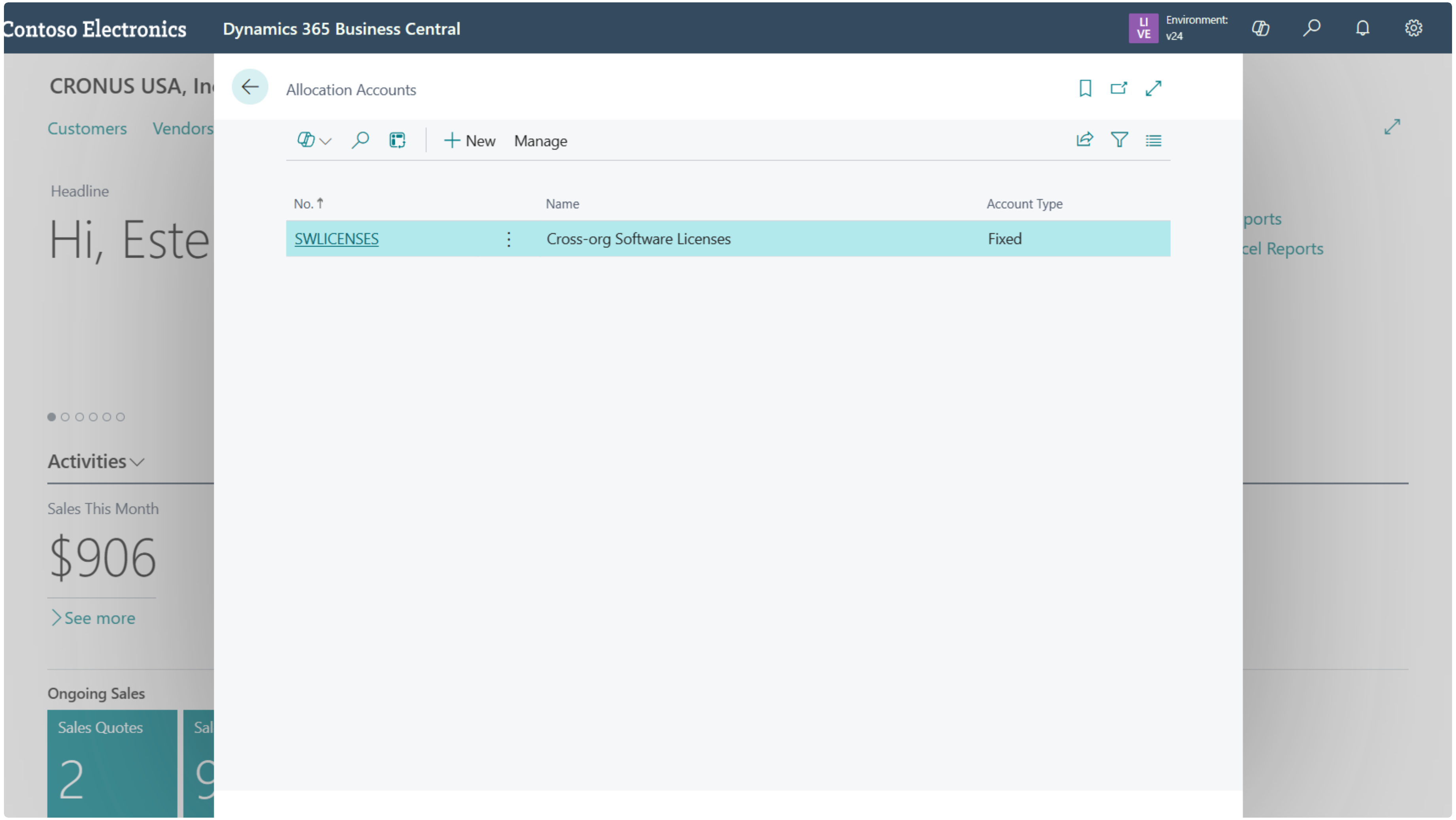


#27: Find apps on Microsoft AppSource

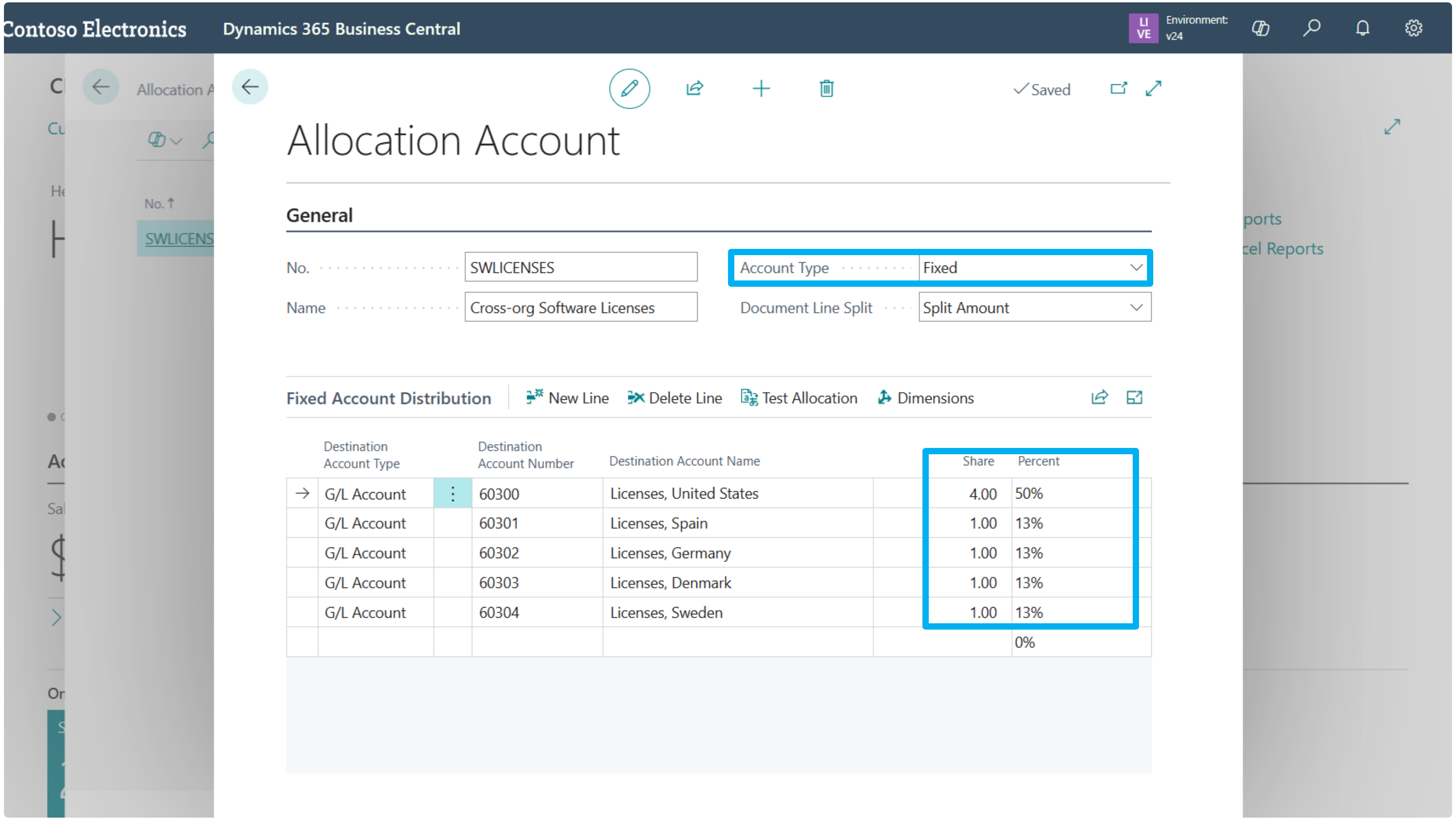


Tip # 28

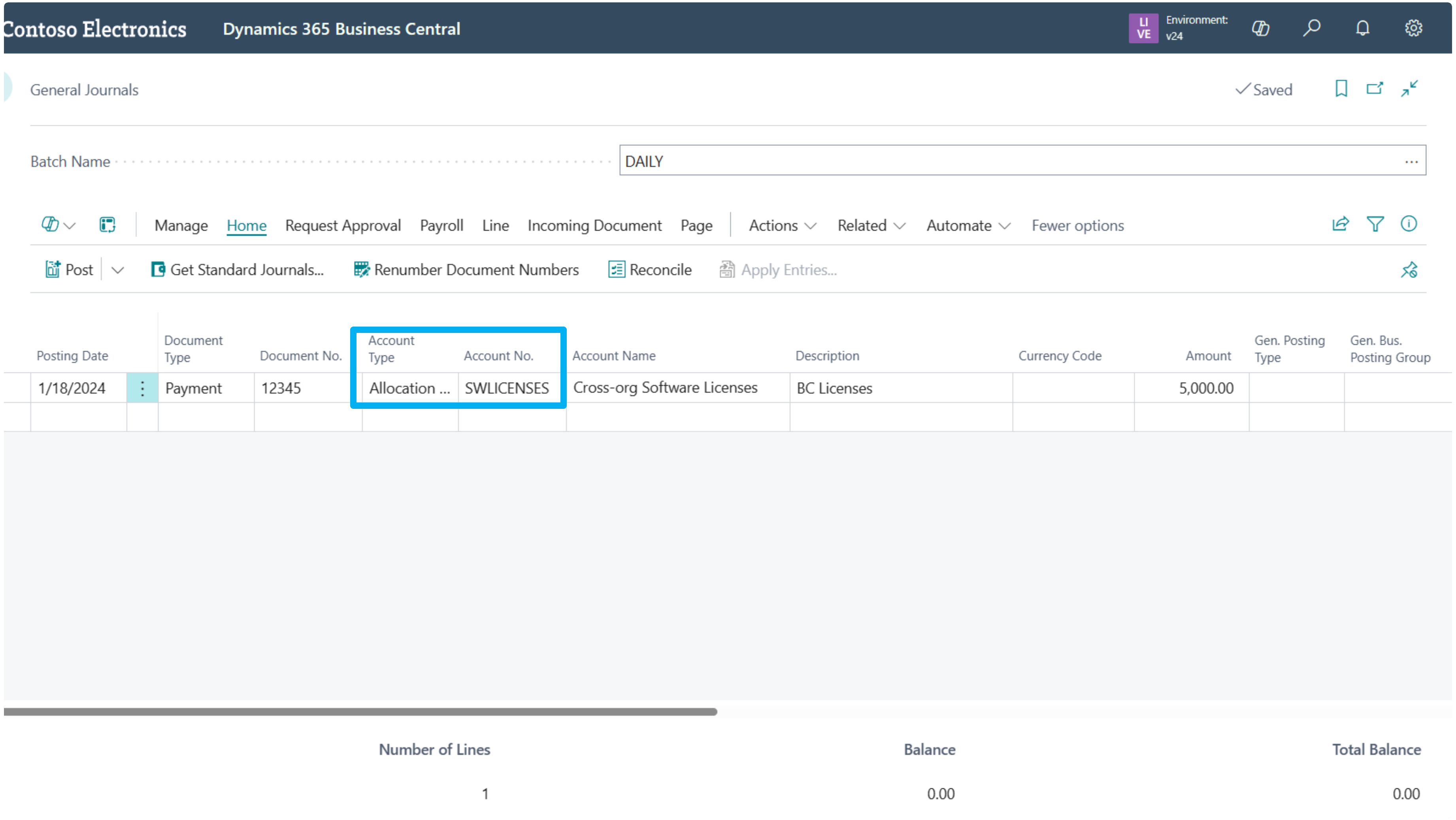
#28: Use Allocation Accounts to easily allocate expenses



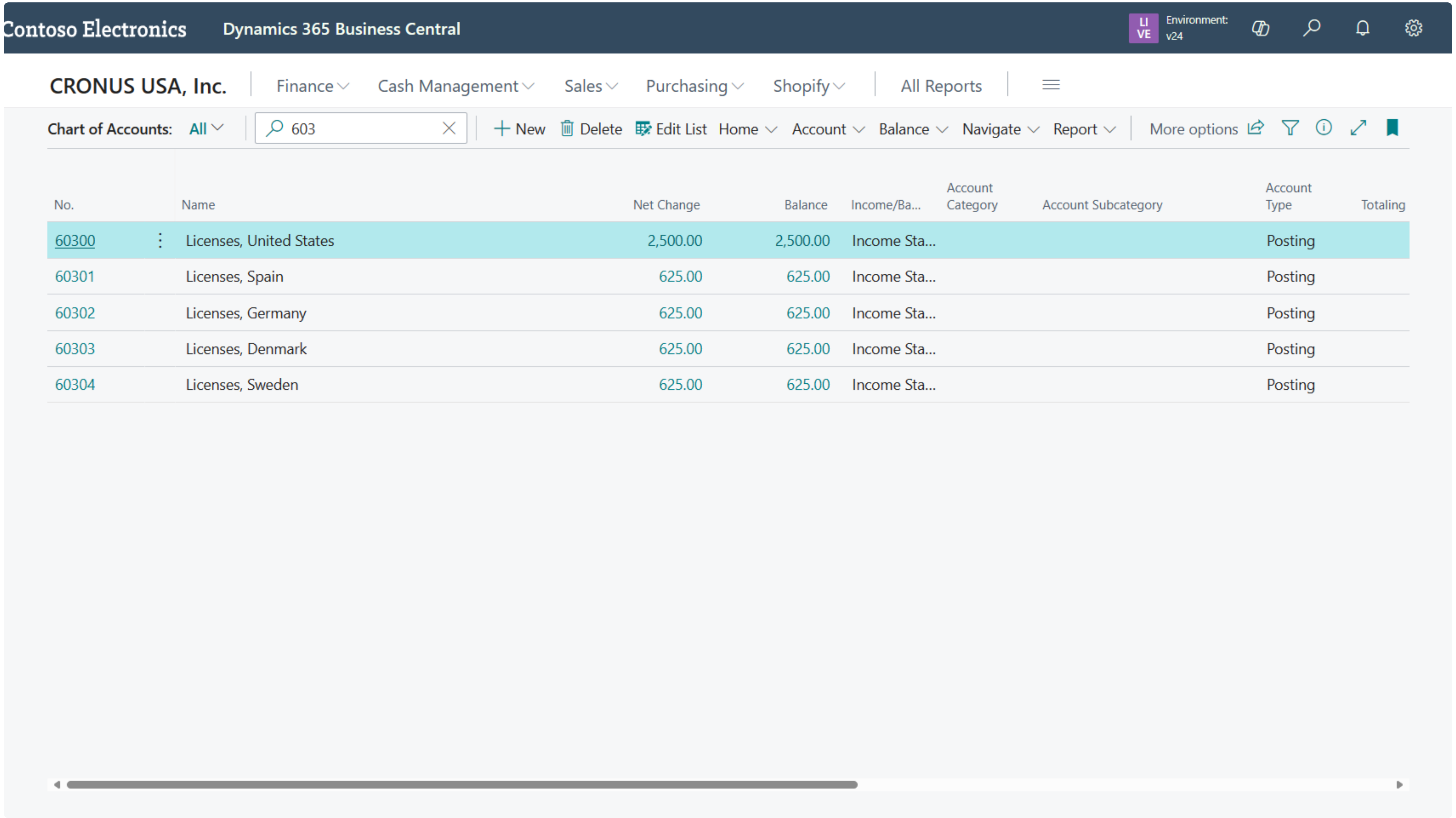
#28: Use Allocation Accounts to easily allocate expenses



#28: Use Allocation Accounts to easily allocate expenses

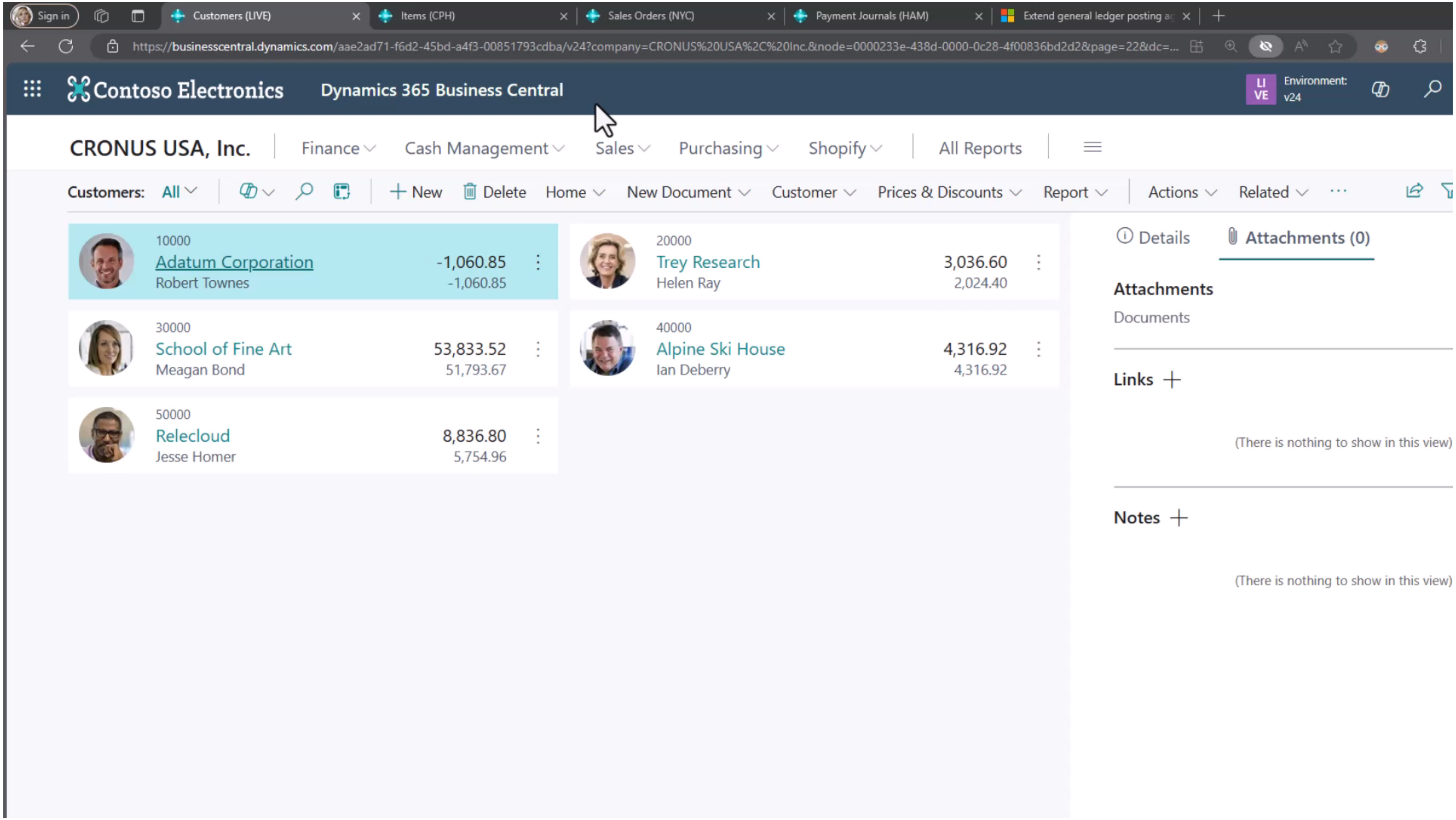


#28: Use Allocation Accounts to easily allocate expenses



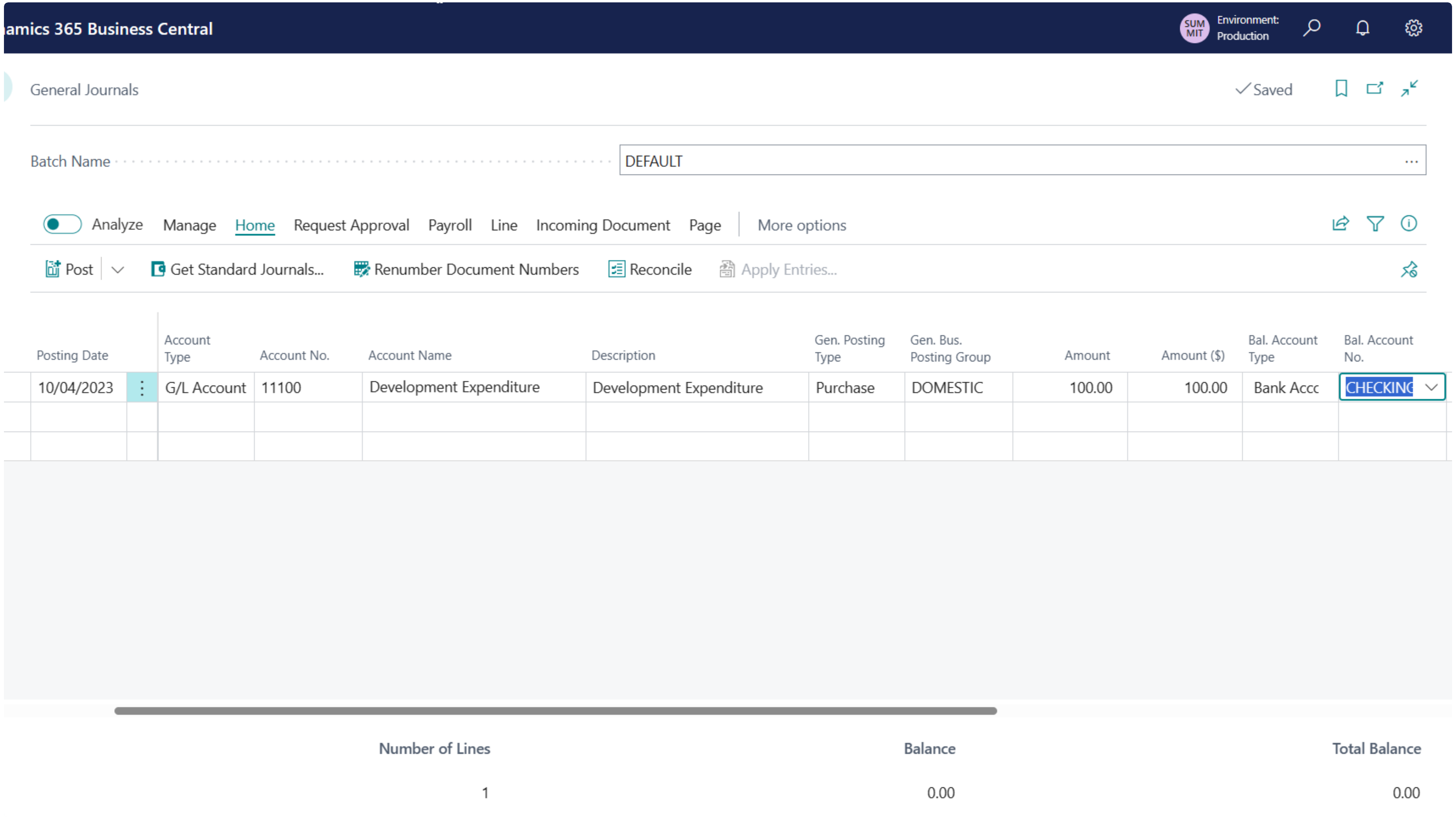
Tip # 29

#29: User browser tab groups for more efficiency

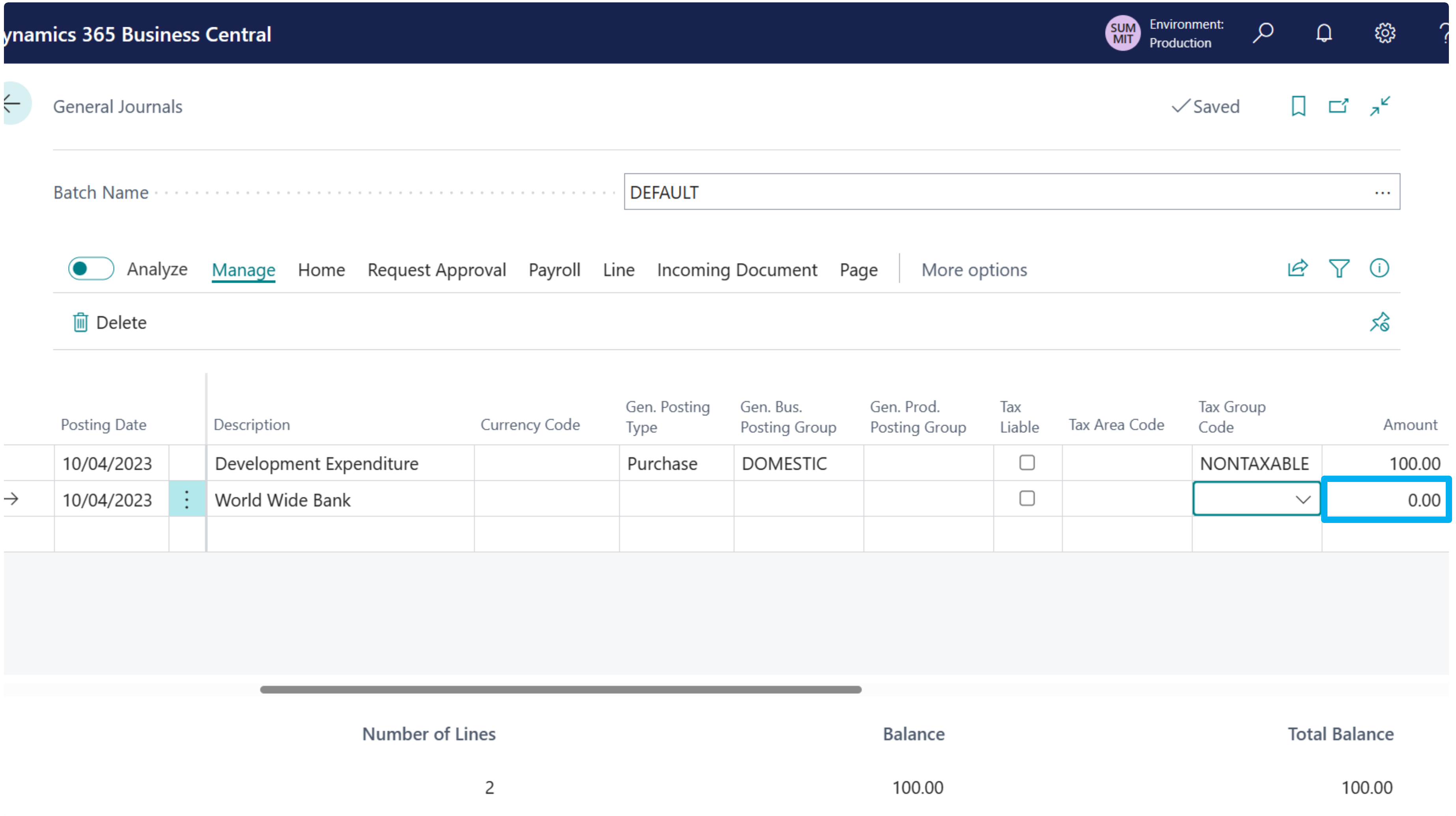


Tip # 30

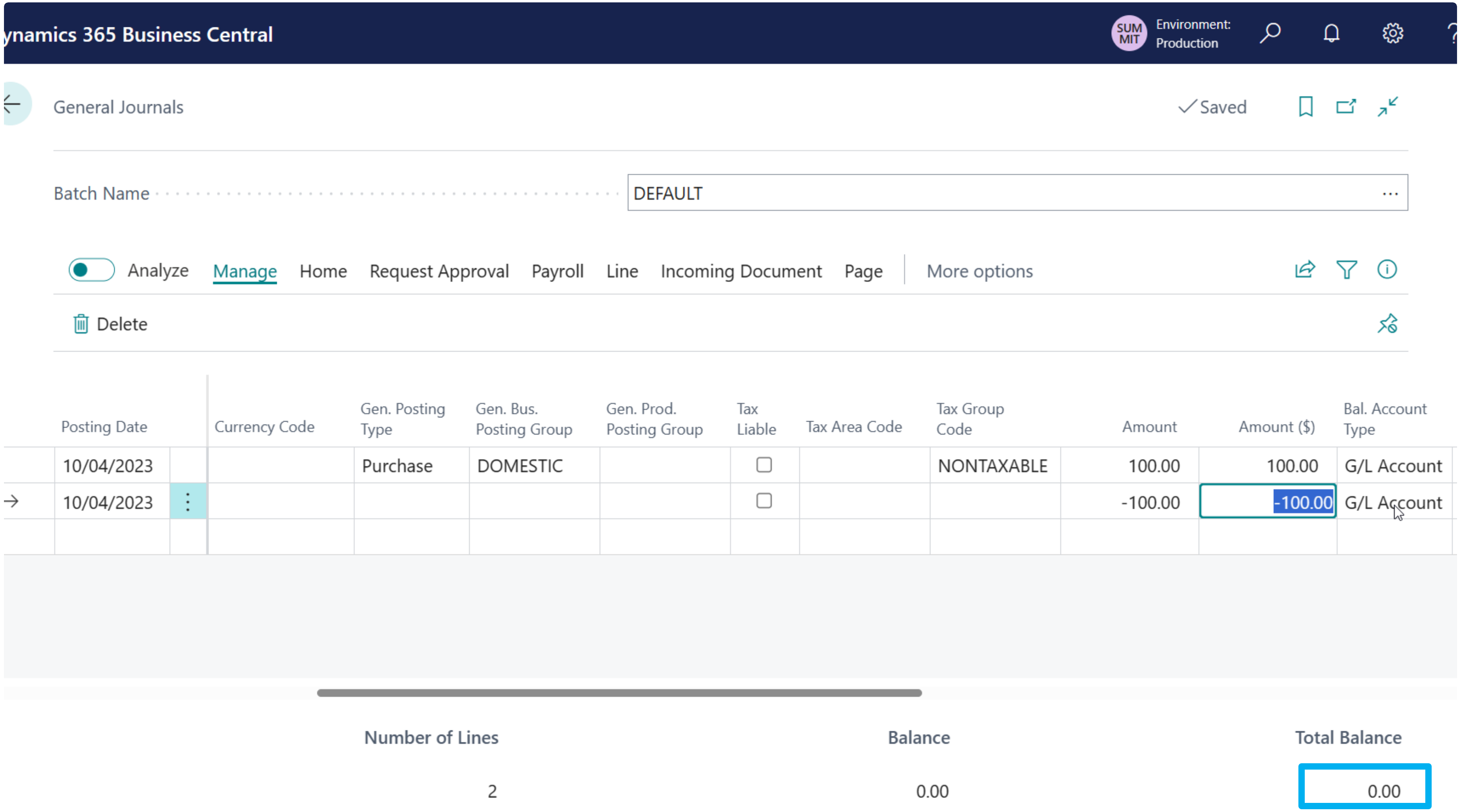
#30: Automatically suggest balancing amount in journals



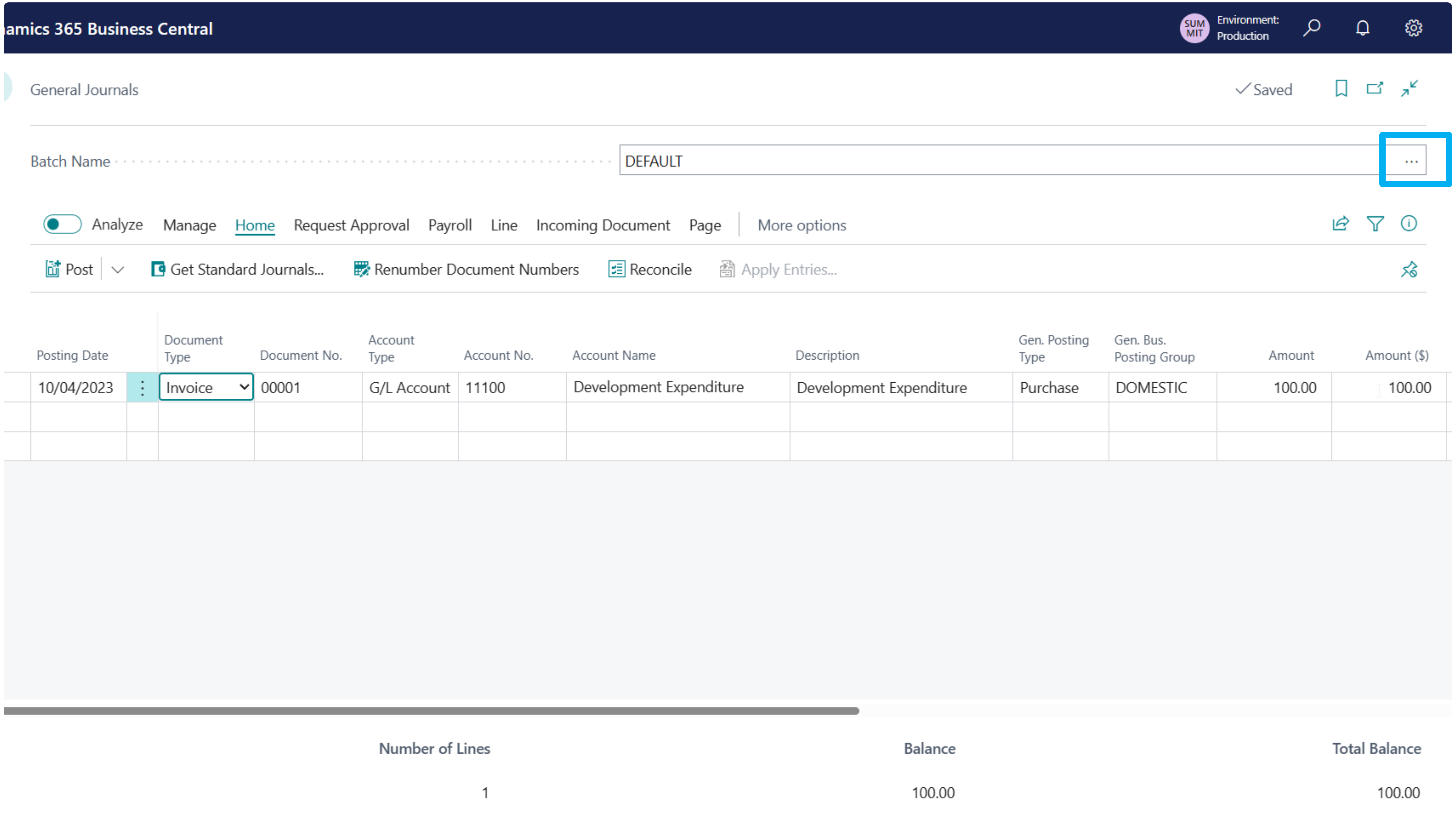
#30: Automatically suggest balancing amount in journals



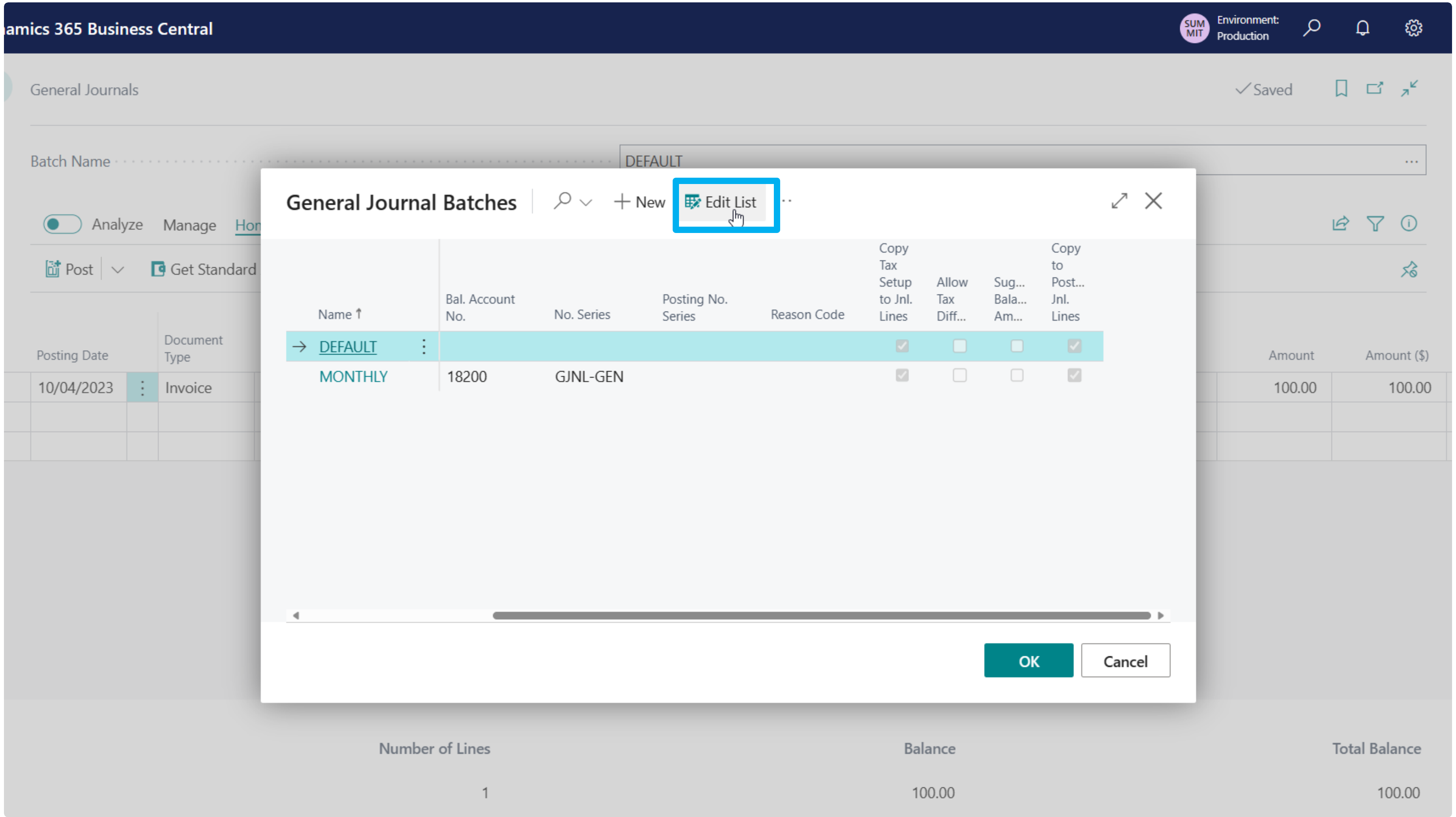
#30: Automatically suggest balancing amount in journals



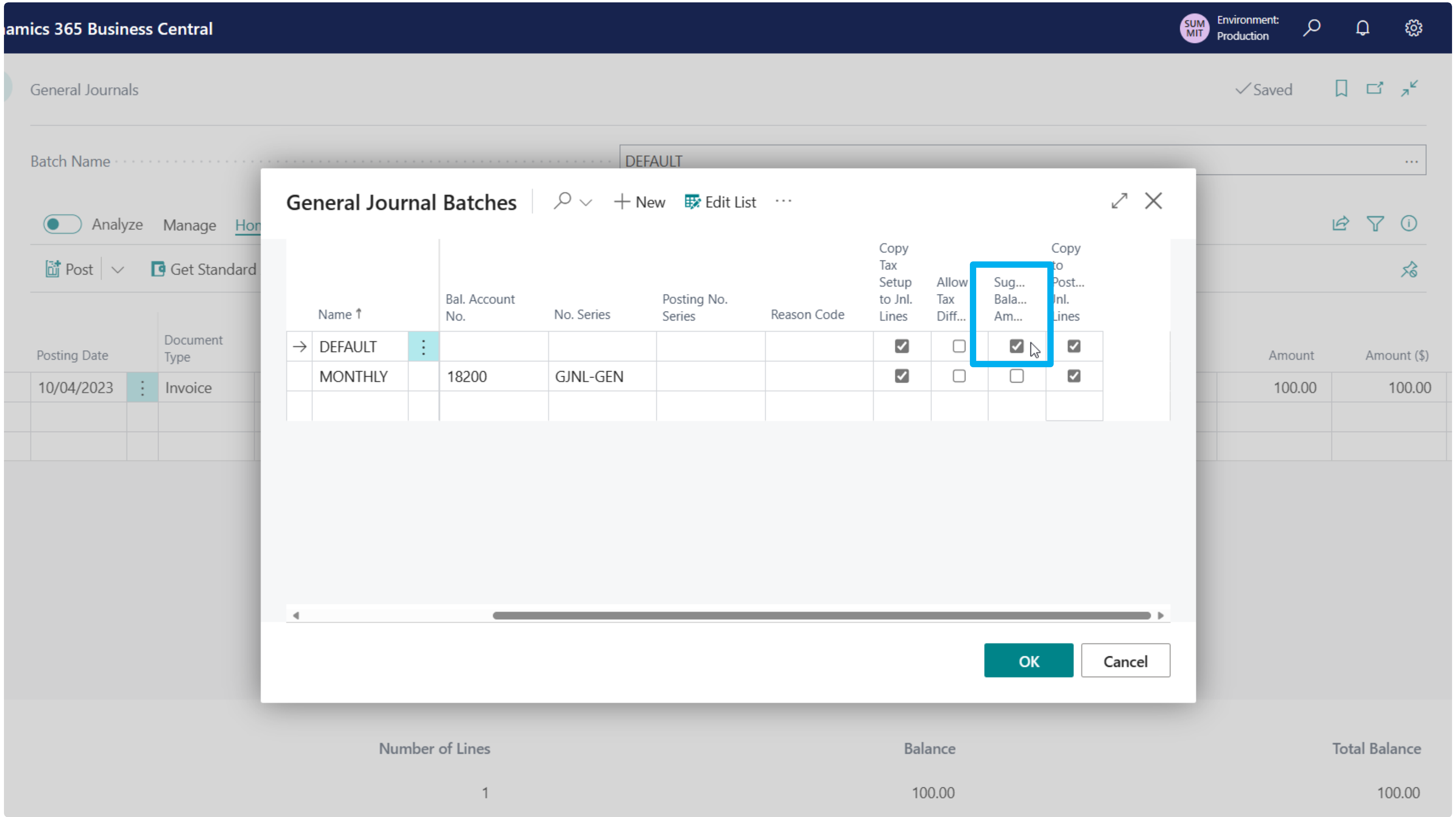
#30: Automatically suggest balancing amount in journals



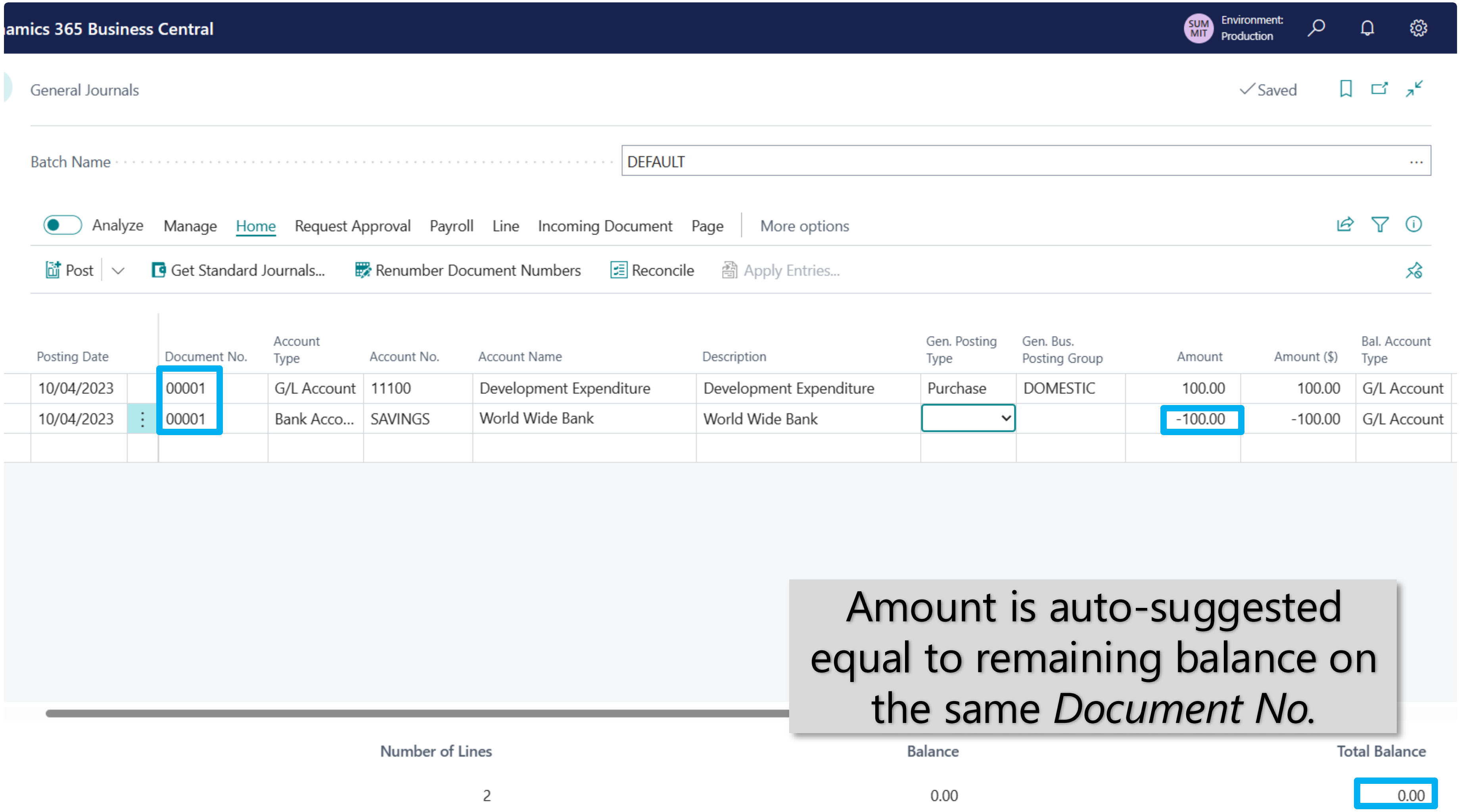
#30: Automatically suggest balancing amount in journals



#30: Automatically suggest balancing amount in journals

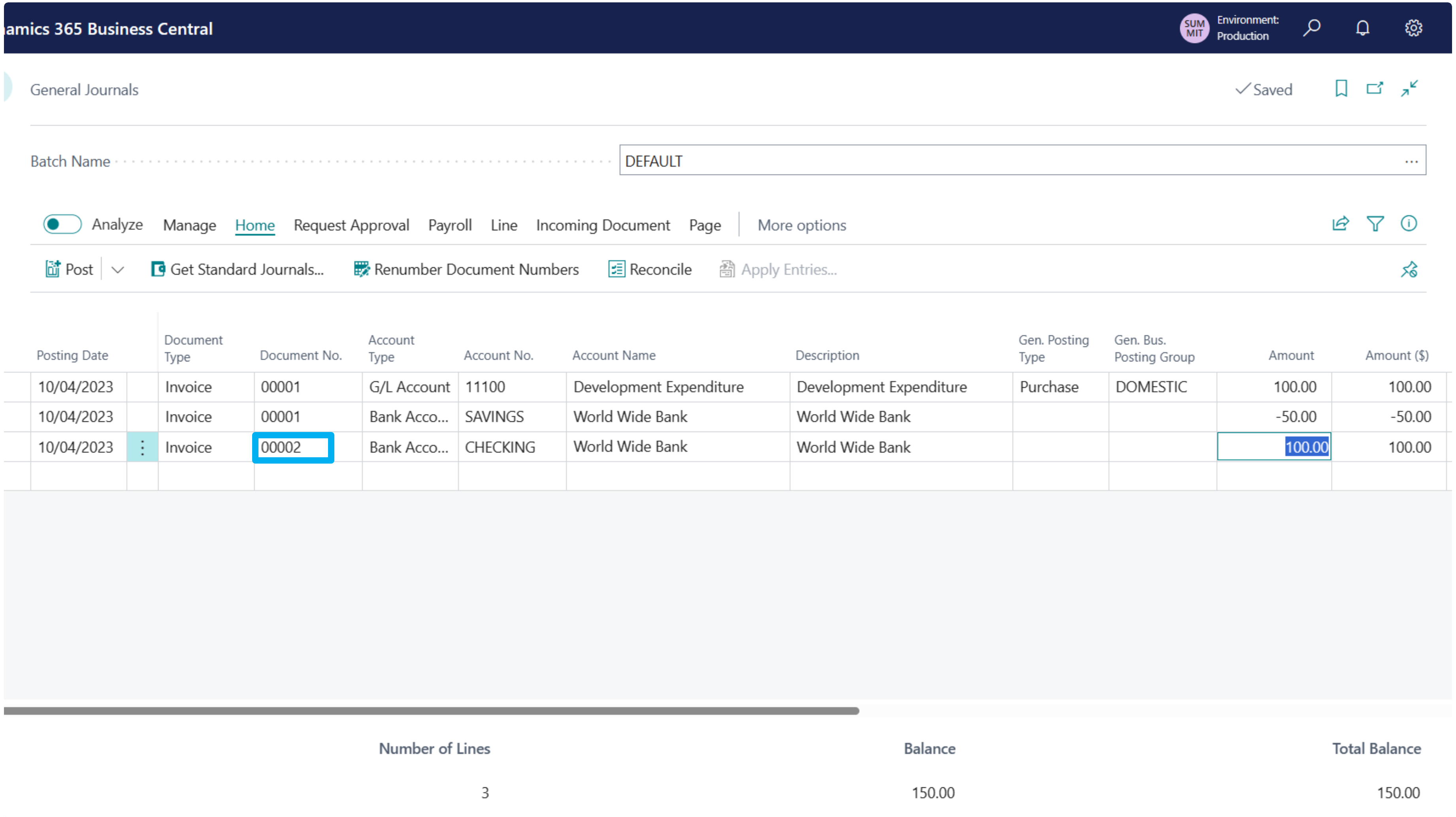


#30: Automatically suggest balancing amount in journals

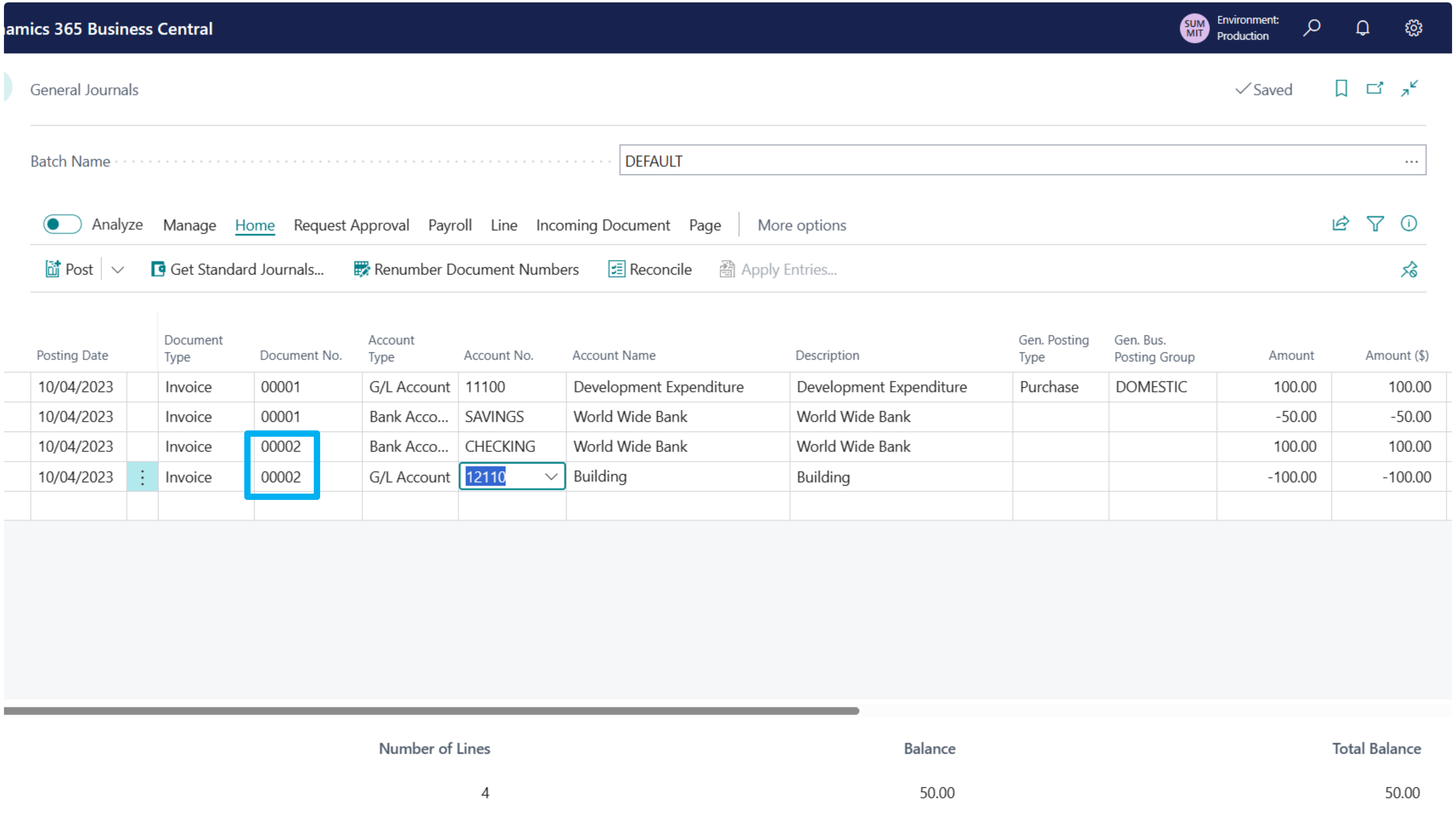


Amount is auto-suggested equal to remaining balance on the same *Document No.*

#30: Automatically suggest balancing amount in journals

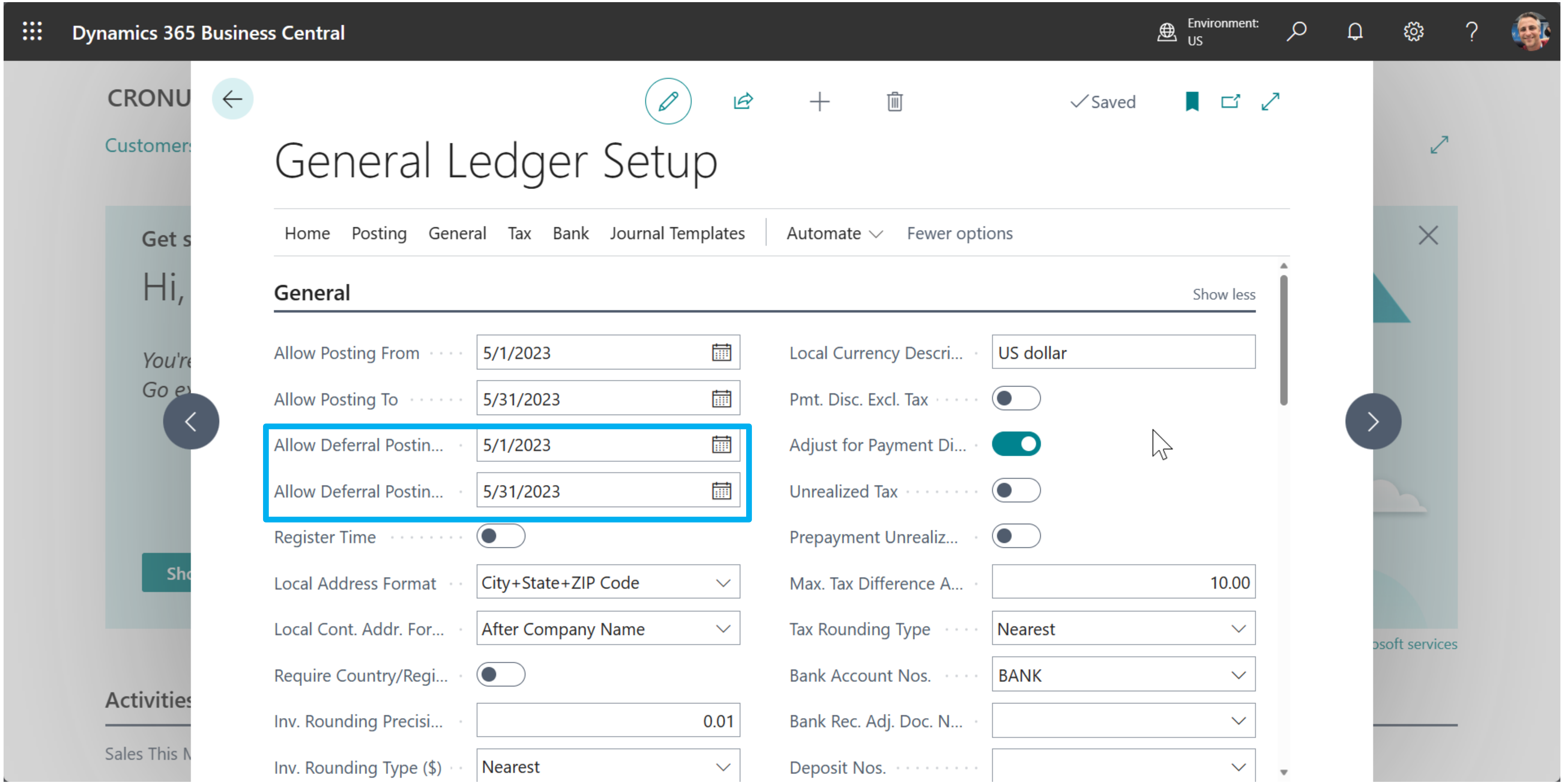


#30: Automatically suggest balancing amount in journals

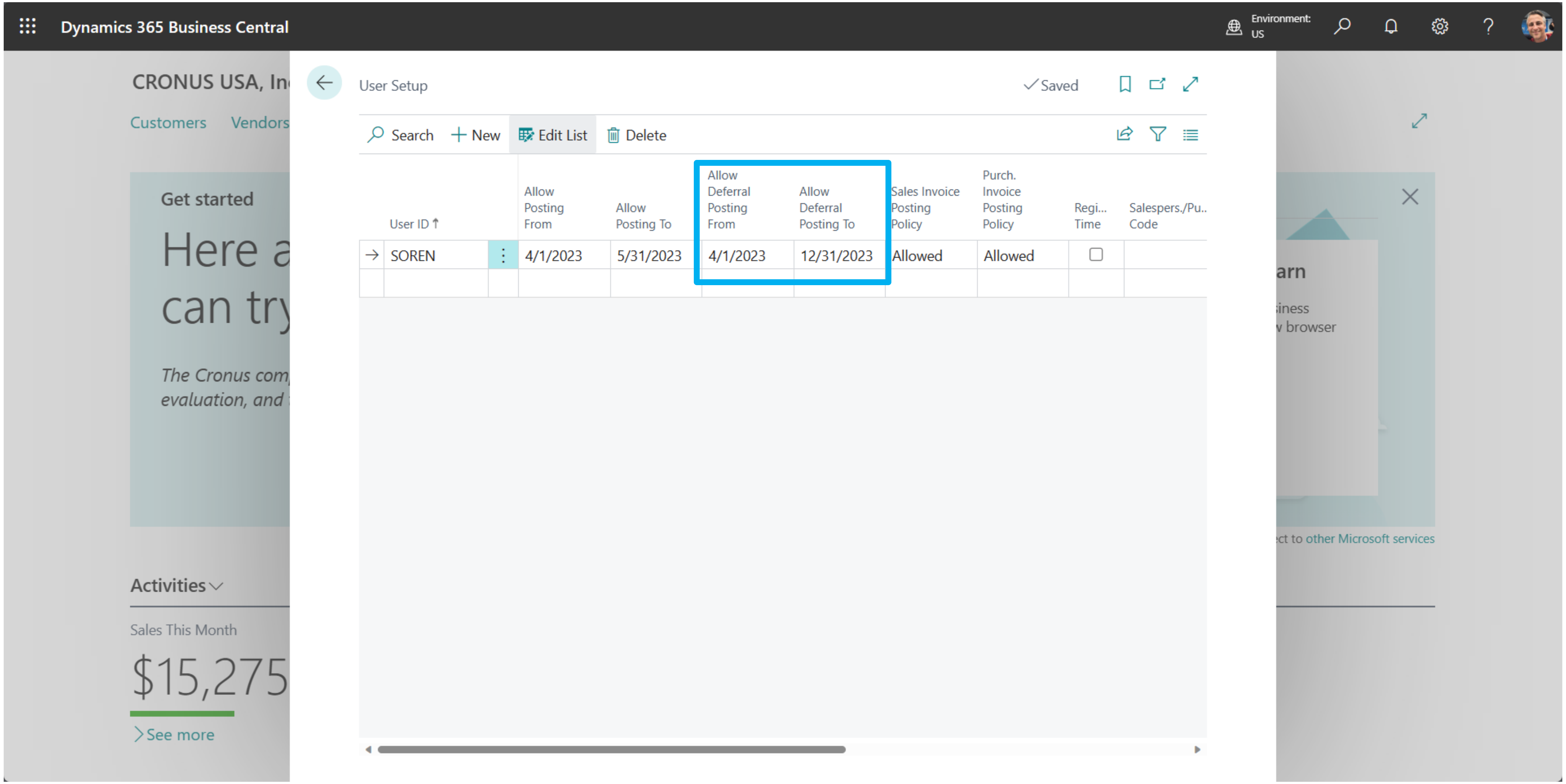


Tip # 31

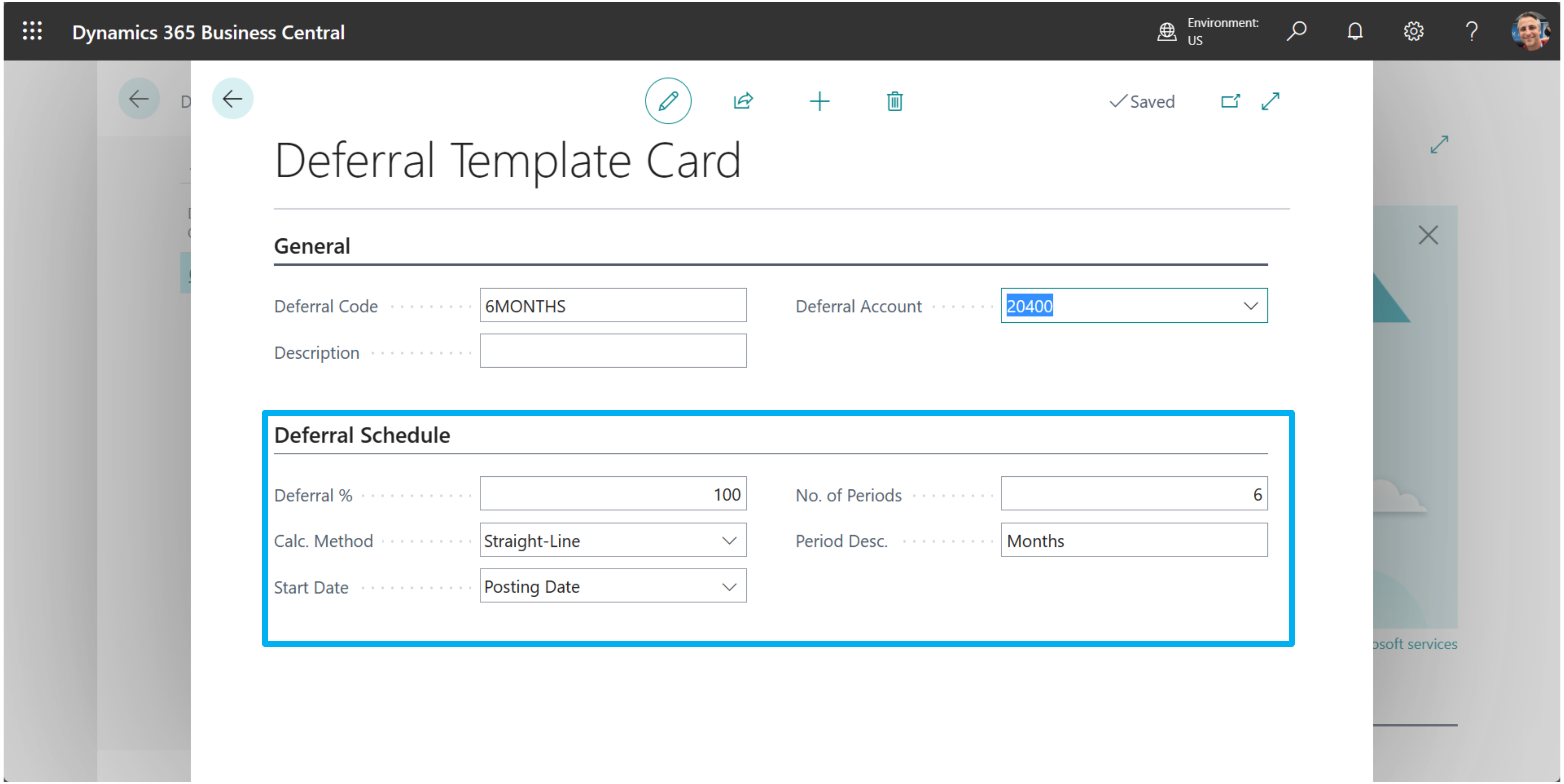
#31: Governing deferred revenue & expenses



#31: Governing deferred revenue & expenses



#31: Governing deferred revenue & expenses



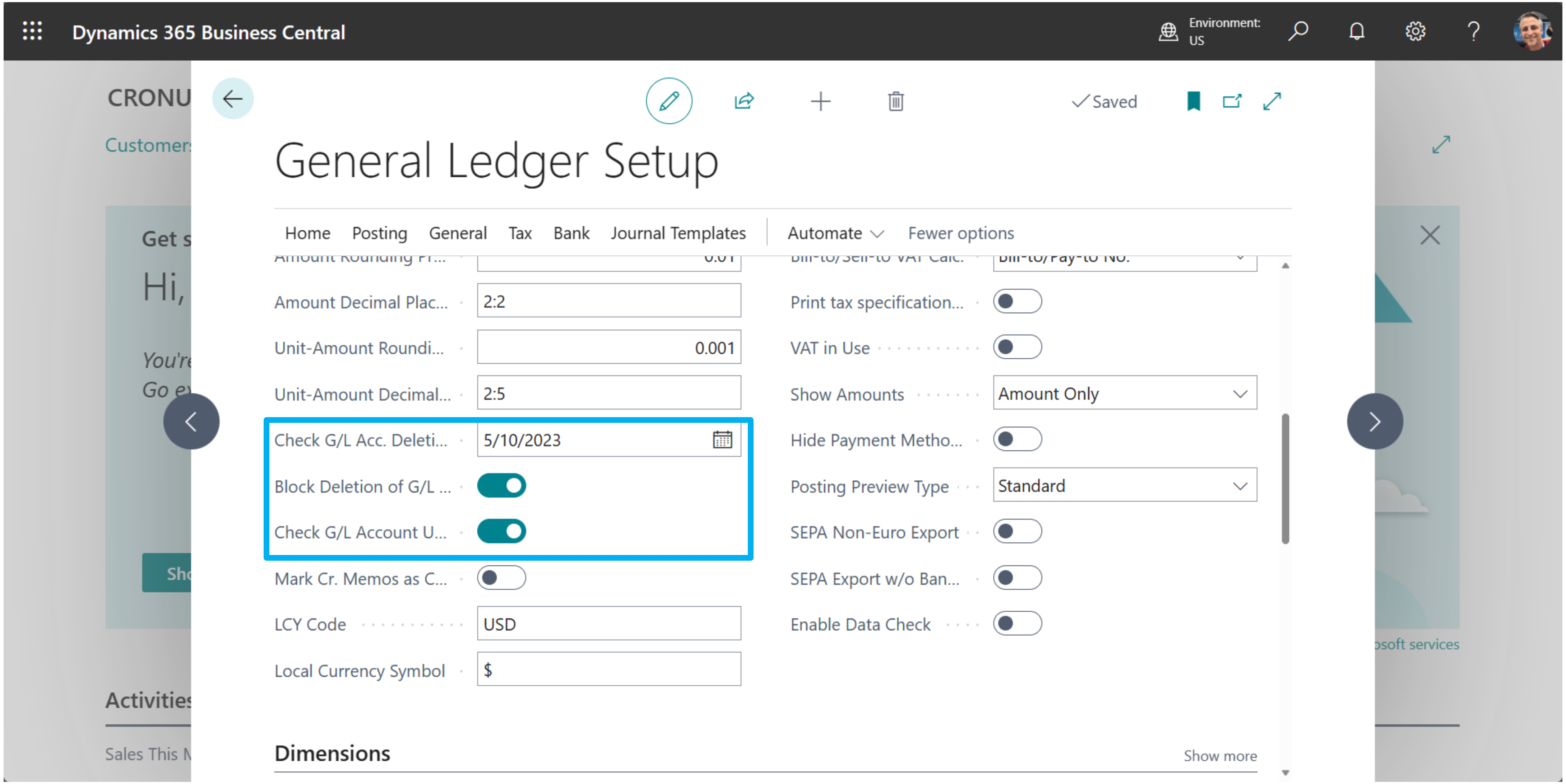
Deferring revenue example

Invoice service delivery of 12,000
Service is being delivered in a 6-month period

Posting Date	Period 1	Period 2	Period 3	Period 4	Period 5	Period 6
Defer revenue to Deferral Account	Move 2,000 from deferral to revenue account	…	…	…	…	…
Revenue: 0 Acc: 0	Revenue: 2,000 Acc: 2,000	Revenue: 2,000 Acc: 4,000	Revenue: 2,000 Acc: 6,000	Revenue: 2,000 Acc: 8,000	Revenue: 2,000 Acc: 10,000	Revenue: 2,000 Acc: 12,000

Tip # 32

#32: Restricting deletion of G&L accounts



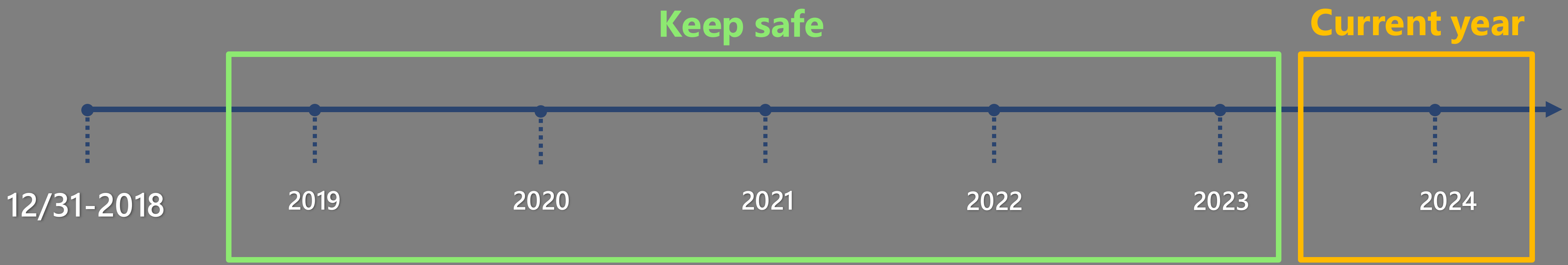
How the G/L account deletion rules work

- If Balance <> 0 an account cannot be deleted
- If no other restriction is set an account can be deleted if Balance = 0
- Restrict deletion by transaction "freshness"
  - ✓ Use "Block Deletion of "G/L Accounts" & "Check G/L Acc. Deletion After"
- Restrict deletion if account is used in setup tables
  - ✓ Use "Check G/L Account Usage"

Restrict deletion of data for last 5 years

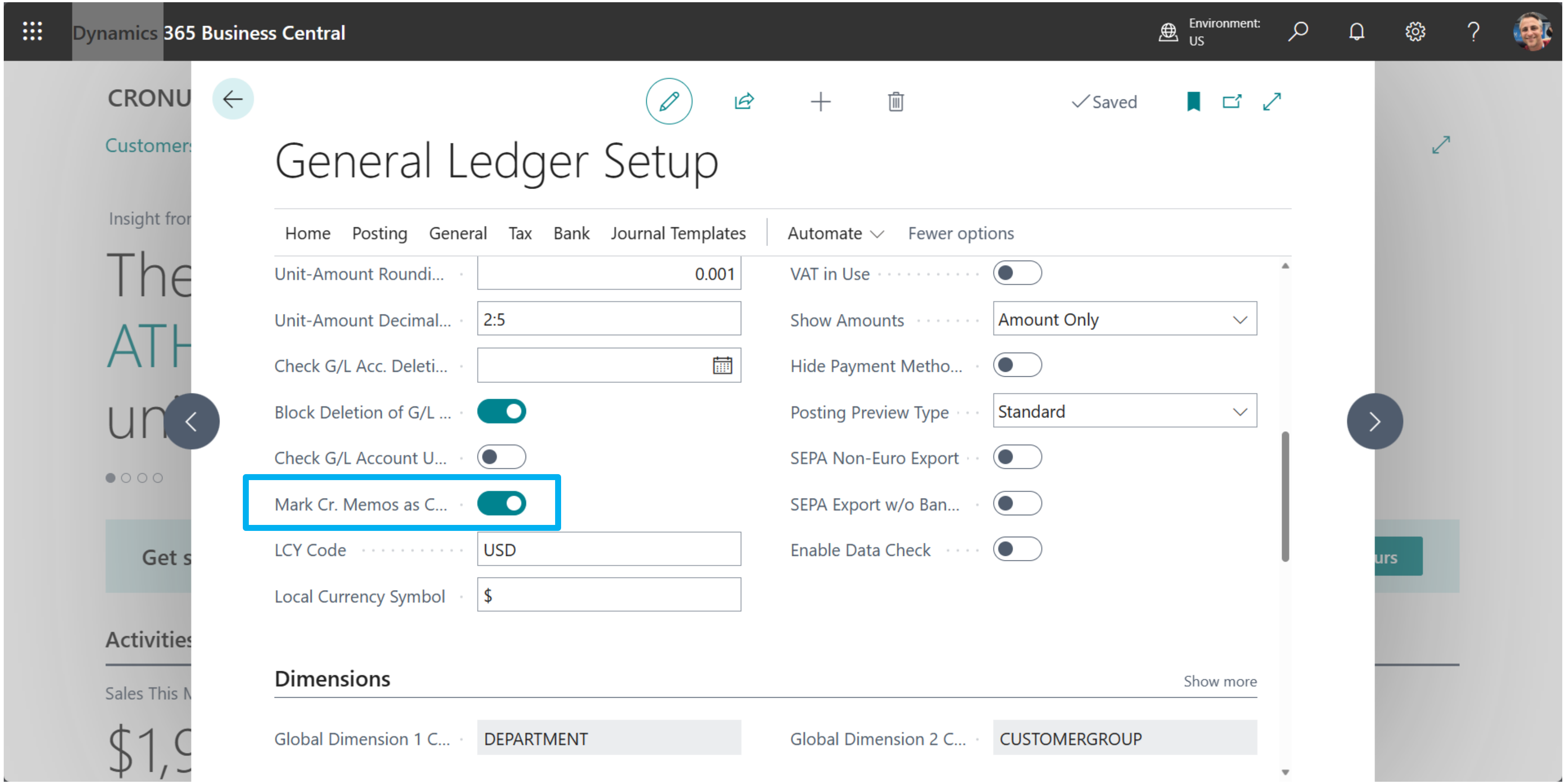
- Set “Check G/L Acc. Deletion After” to:
  <u>The date before which it is okay to delete transactions</u>

- Example: All transactions back to and including 2019 must be kept.
- Set Check G/L Acc. Deletion After” to December 31st 2018



Tip # 33

#33: Determining how Credit Memos are posted



Why determine how Credit Memos are posted?

"Mark Cr. Memo as Correction"
disabled

	Debit	Credit	
Invoice	1,000		
		1,000	Cr. Memo

Customer account

"Mark Cr. Memo as Correction"
enabled

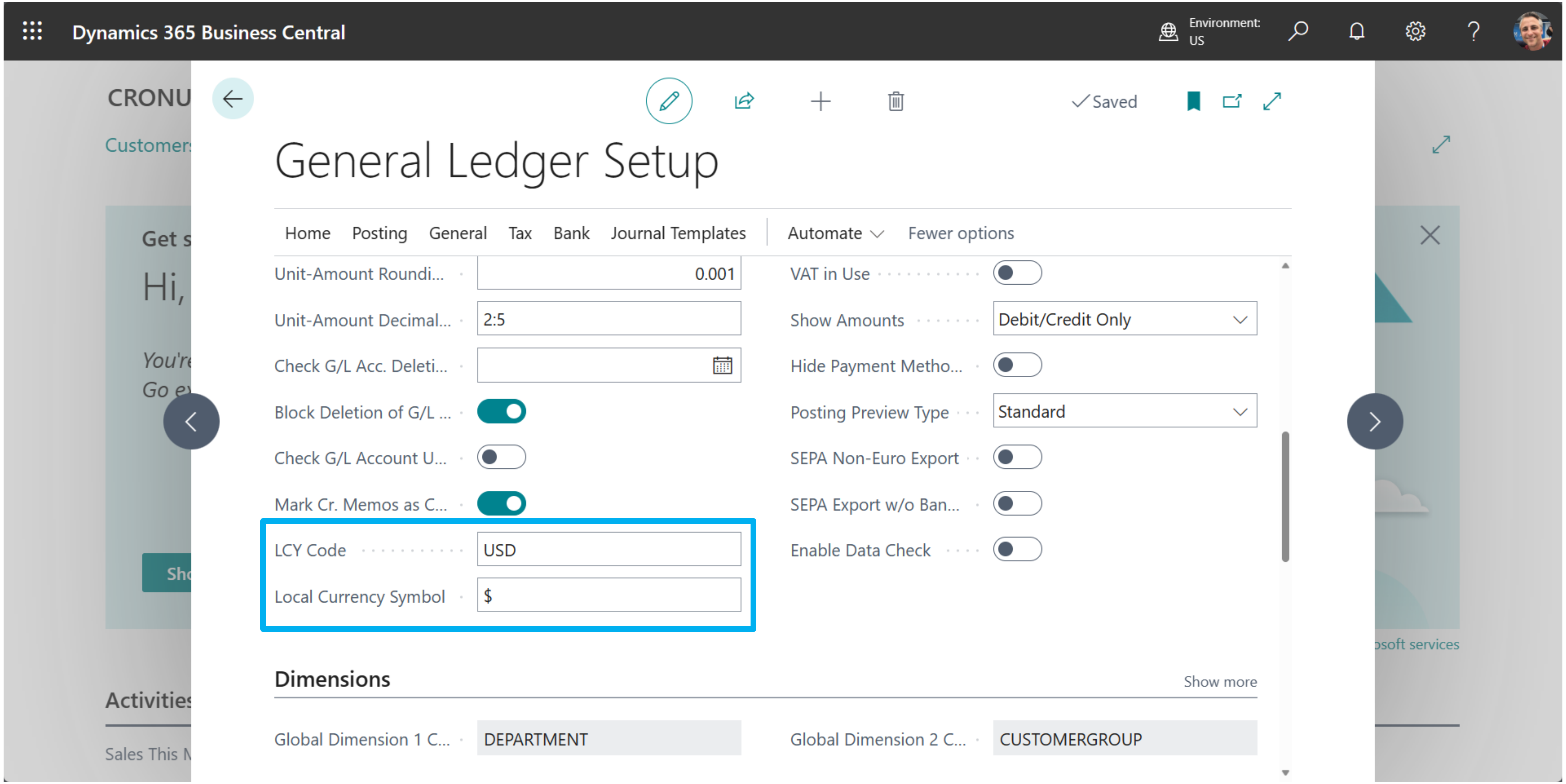
	Debit	Credit
Invoice	1,000	
Cr. Memo	-1,000	

Customer account

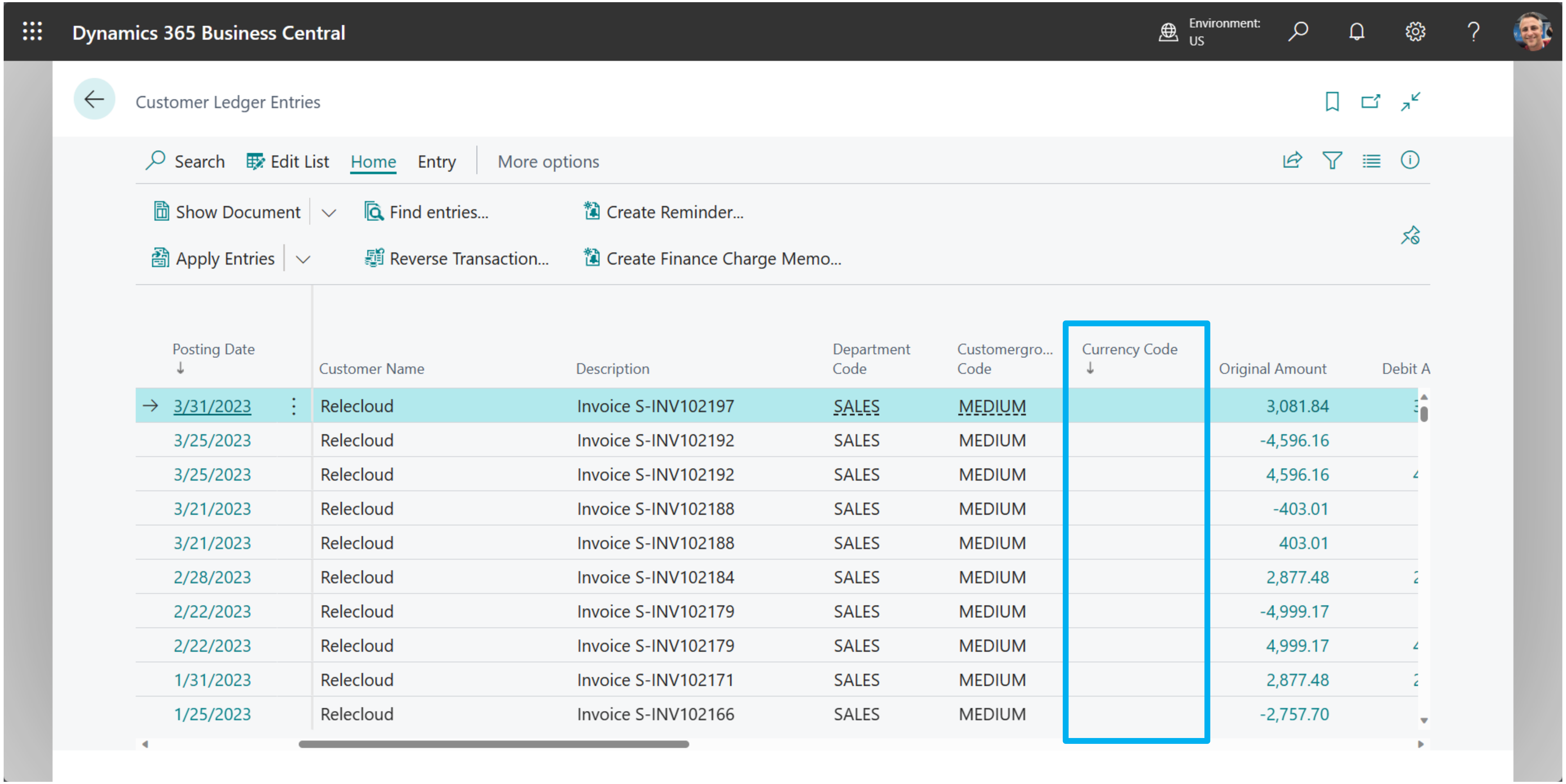
Some countries have this regulatory requirement

Tip # 34

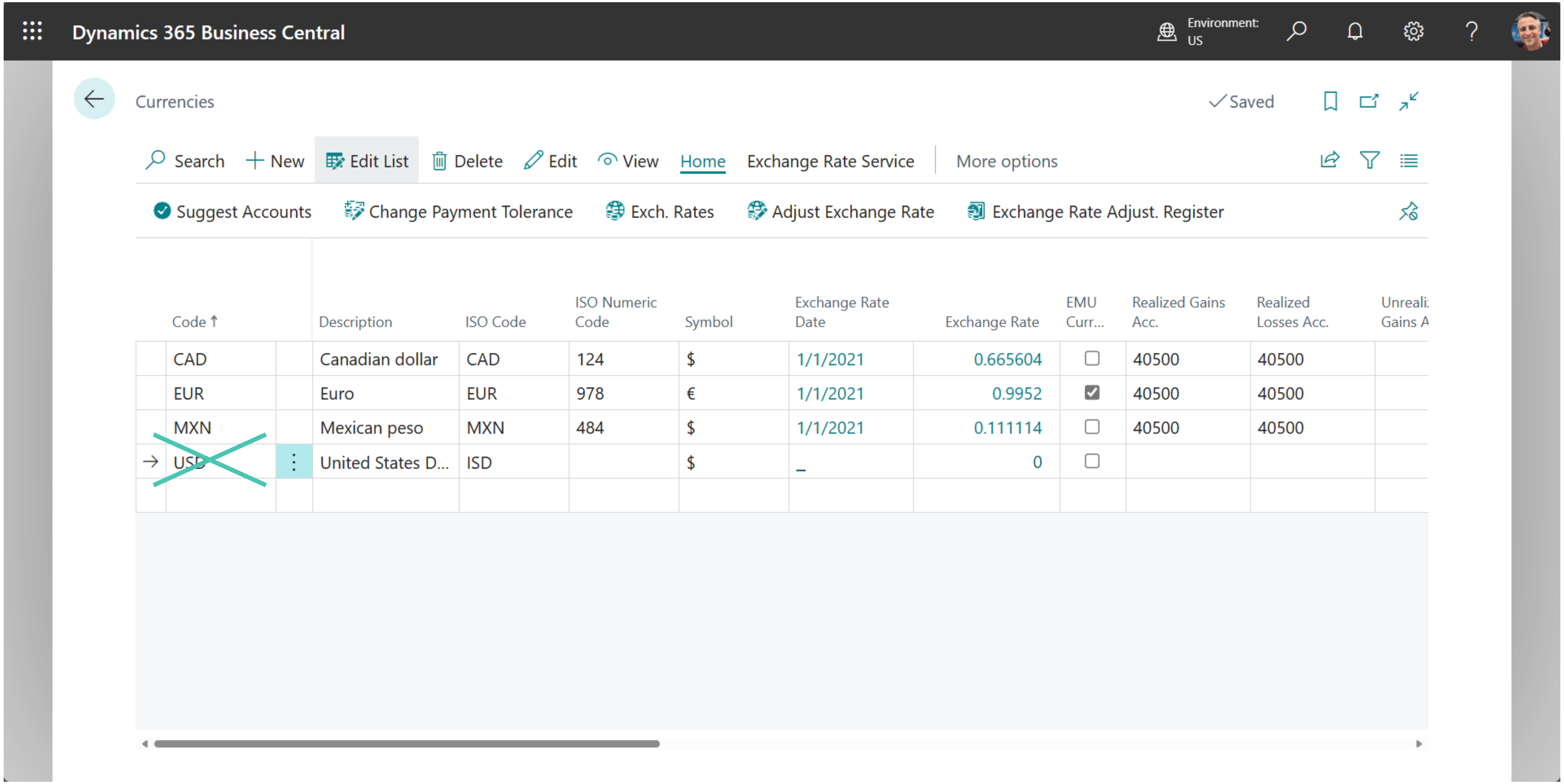
#34: Setting the local currency



#34: Setting the local currency

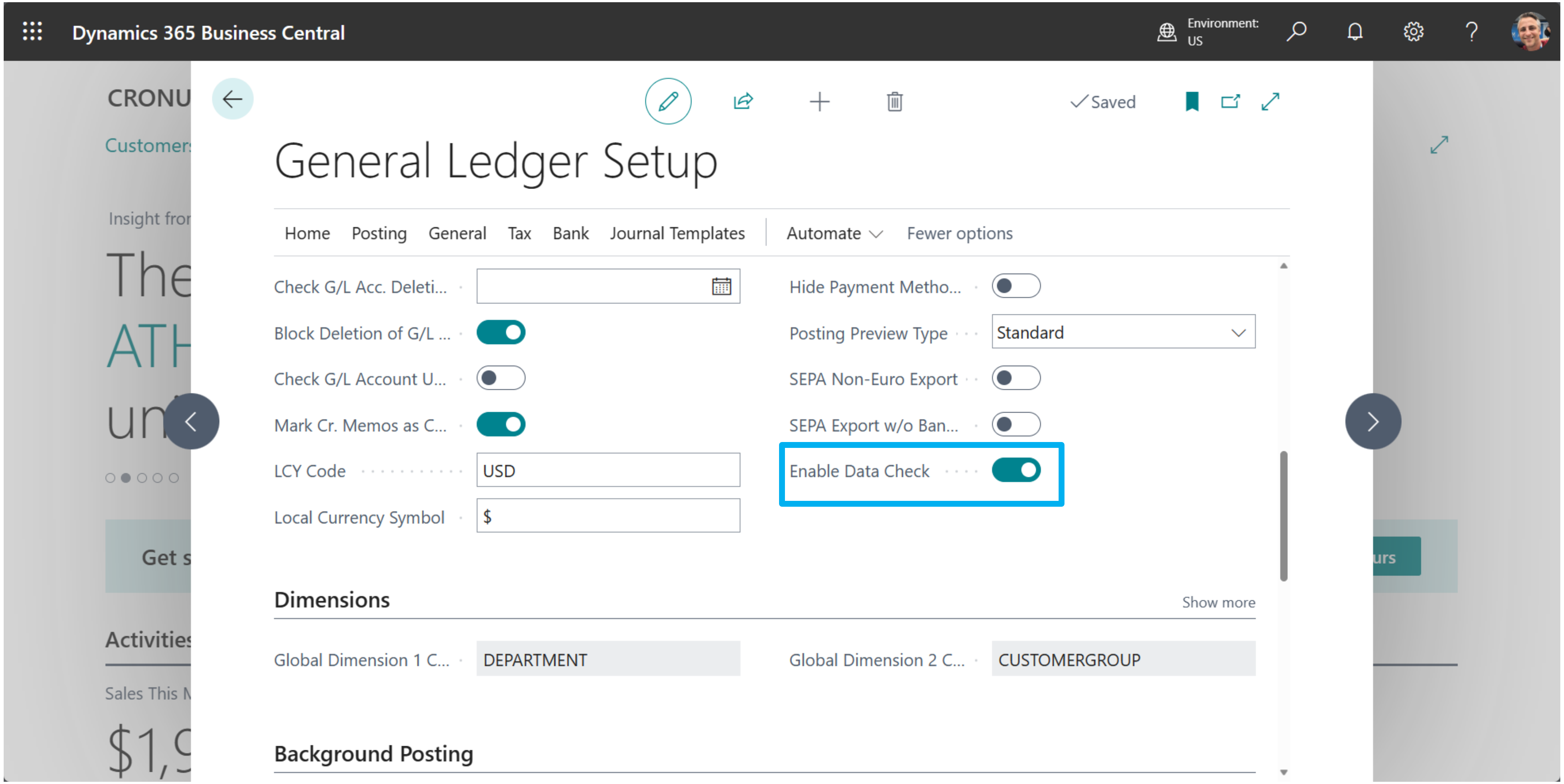


#34: Setting the local currency

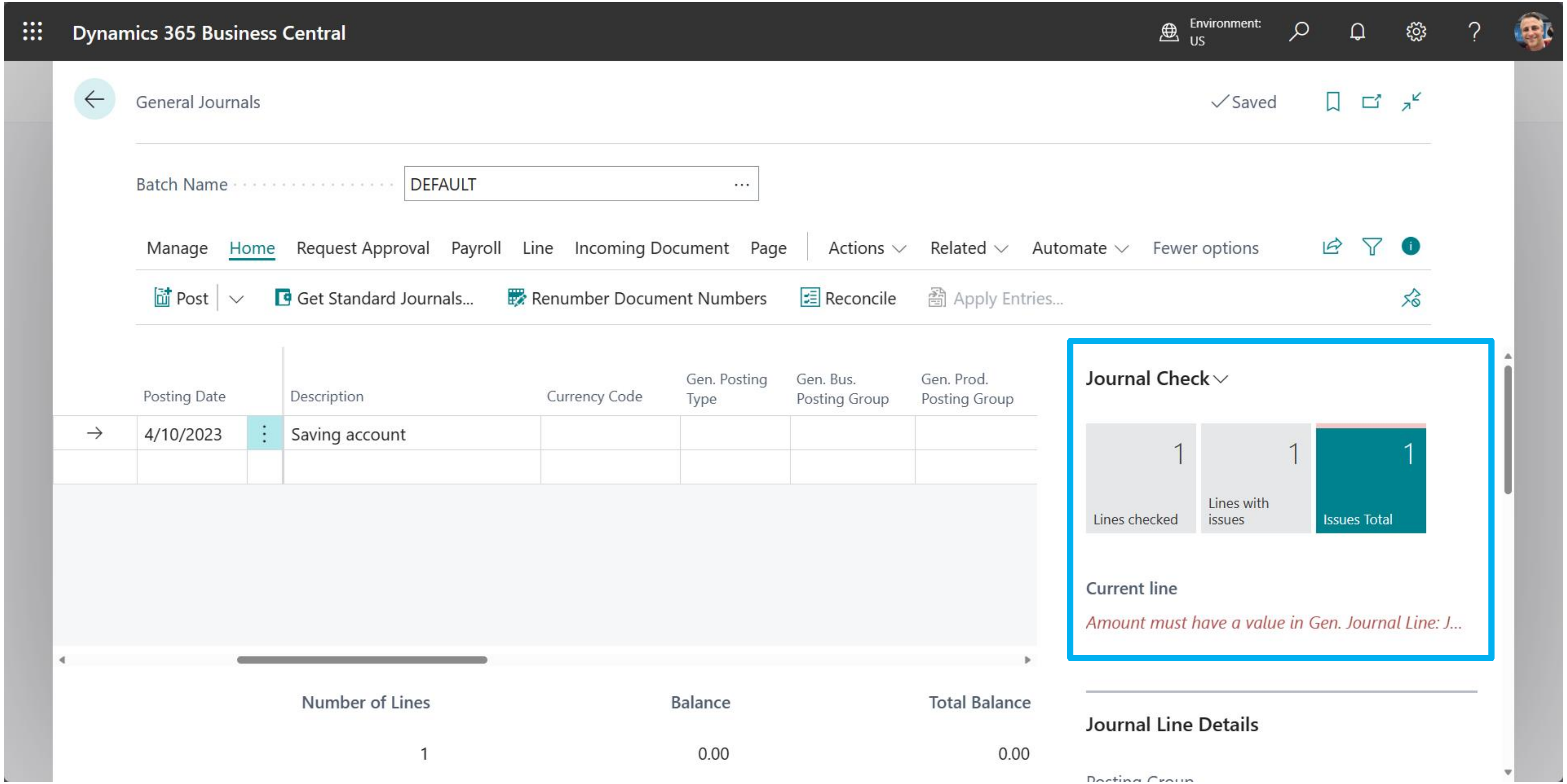


Tip # 35

#35: Resolve errors as you type

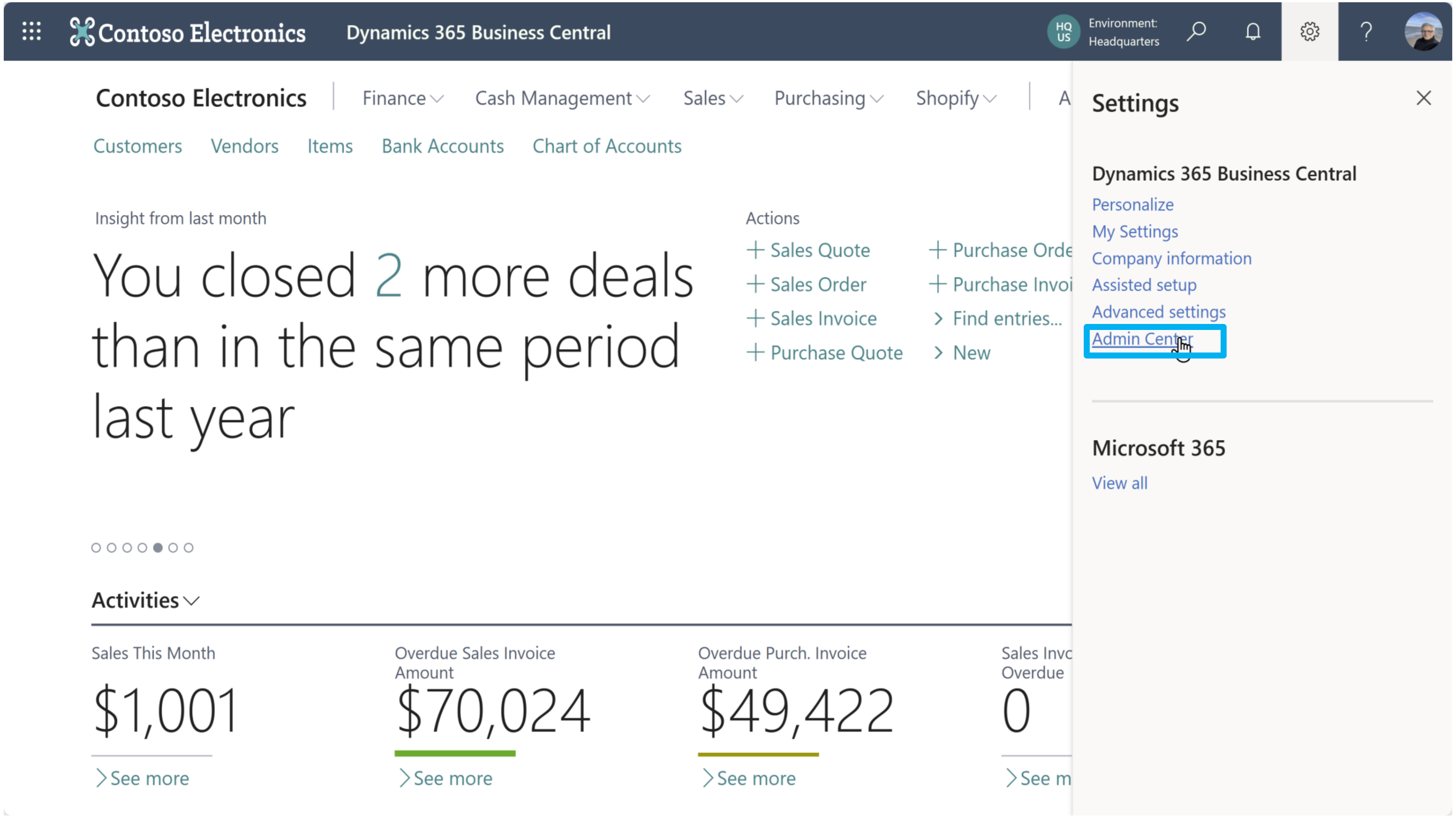


#35: Resolve errors as you type

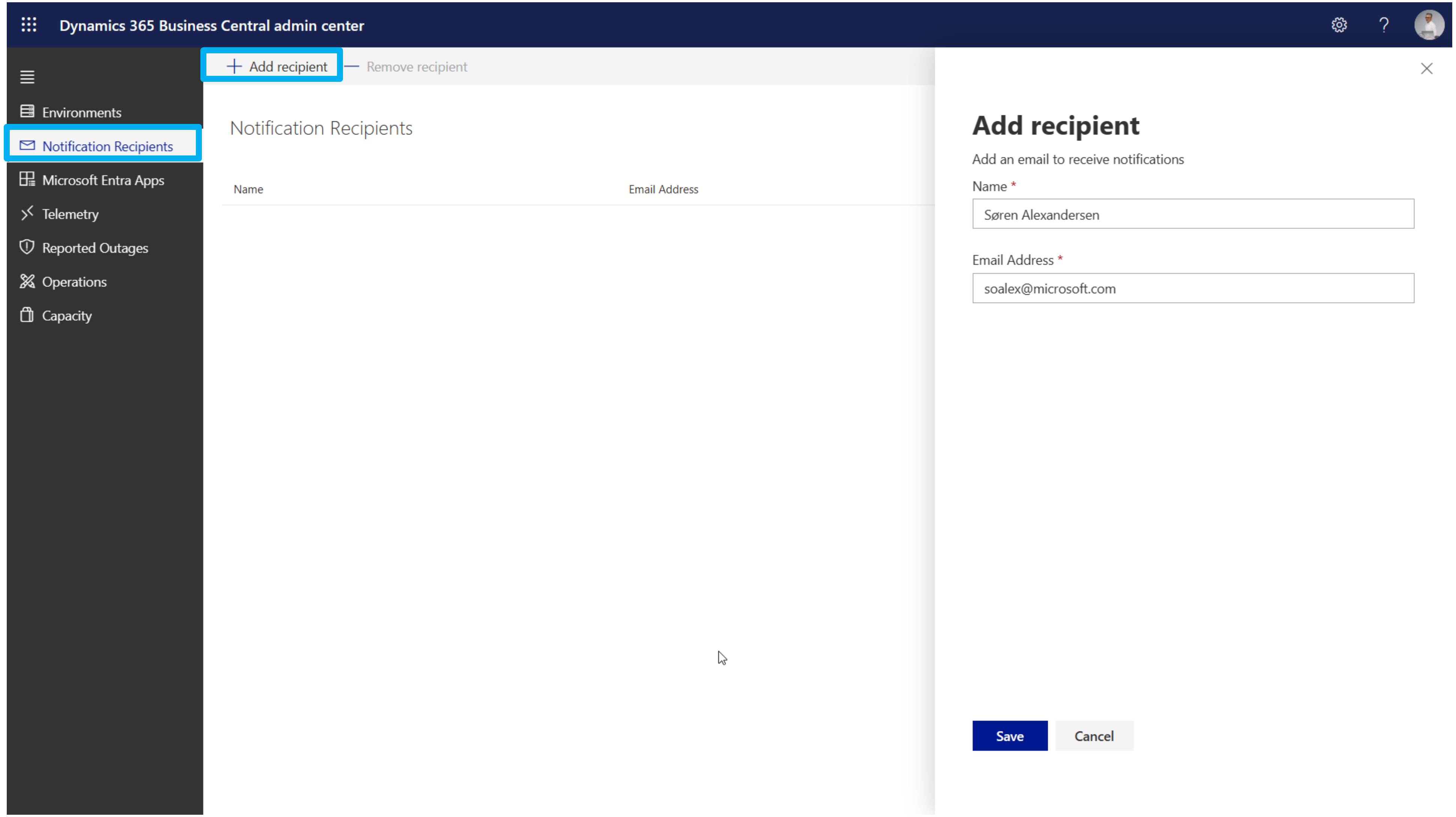


Tip # 36

#36: Stay on top of environment lifecycle events (scheduled updates etc.)



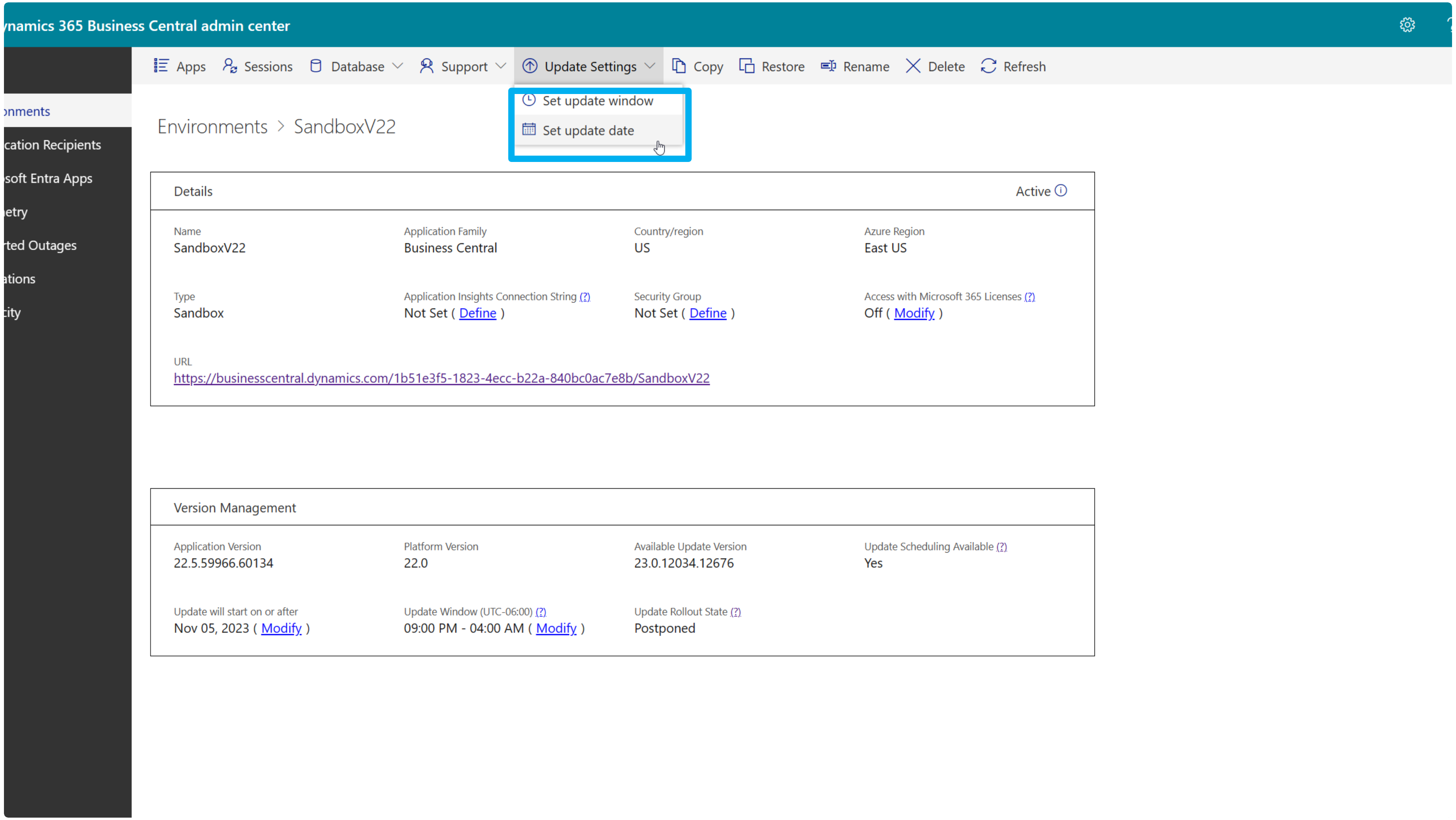
#36: Stay on top of environment lifecycle events (scheduled updates etc.)



Tip # 37

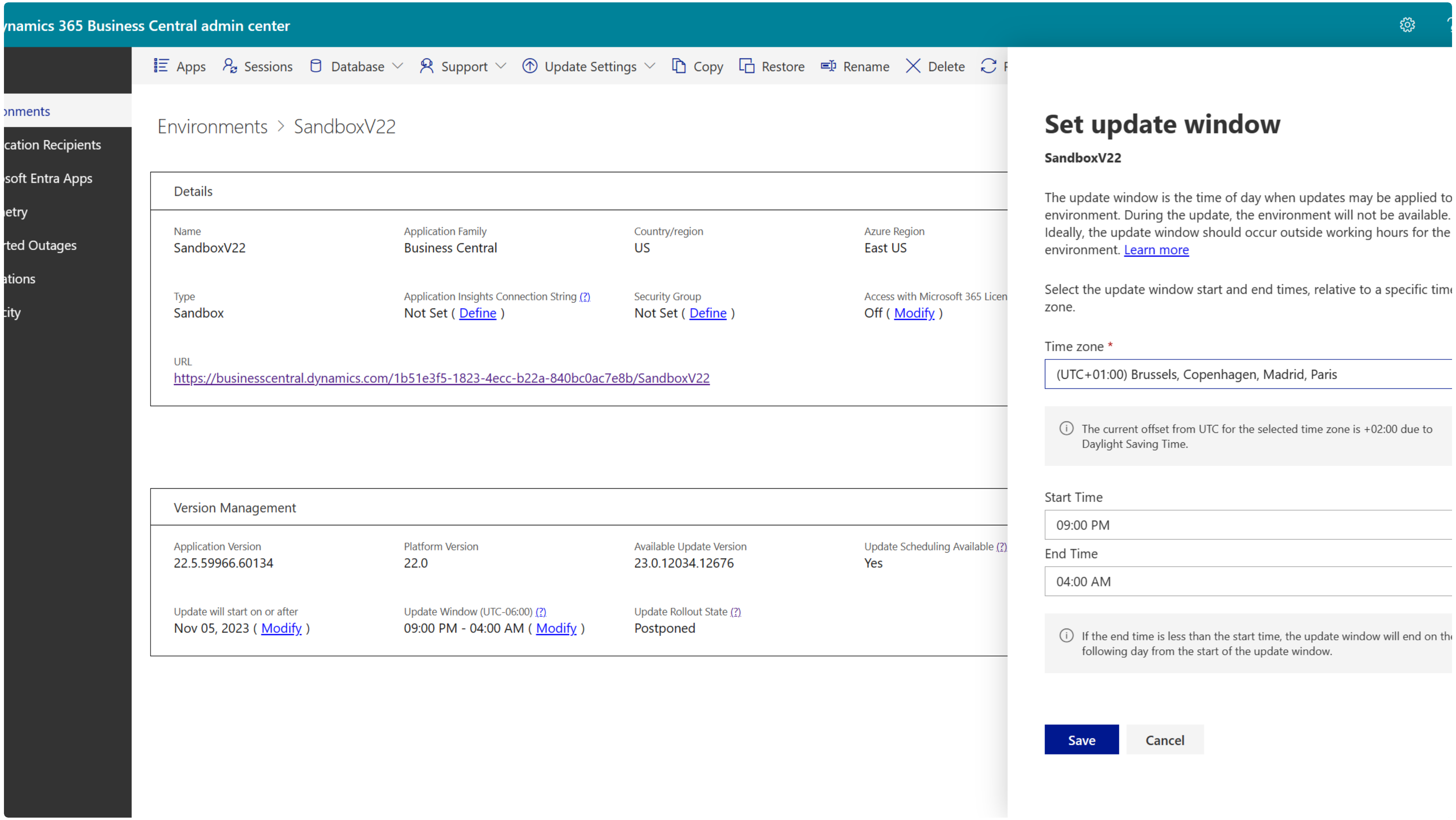
#37: Take control of when updates occur

Note the new update rules(!)



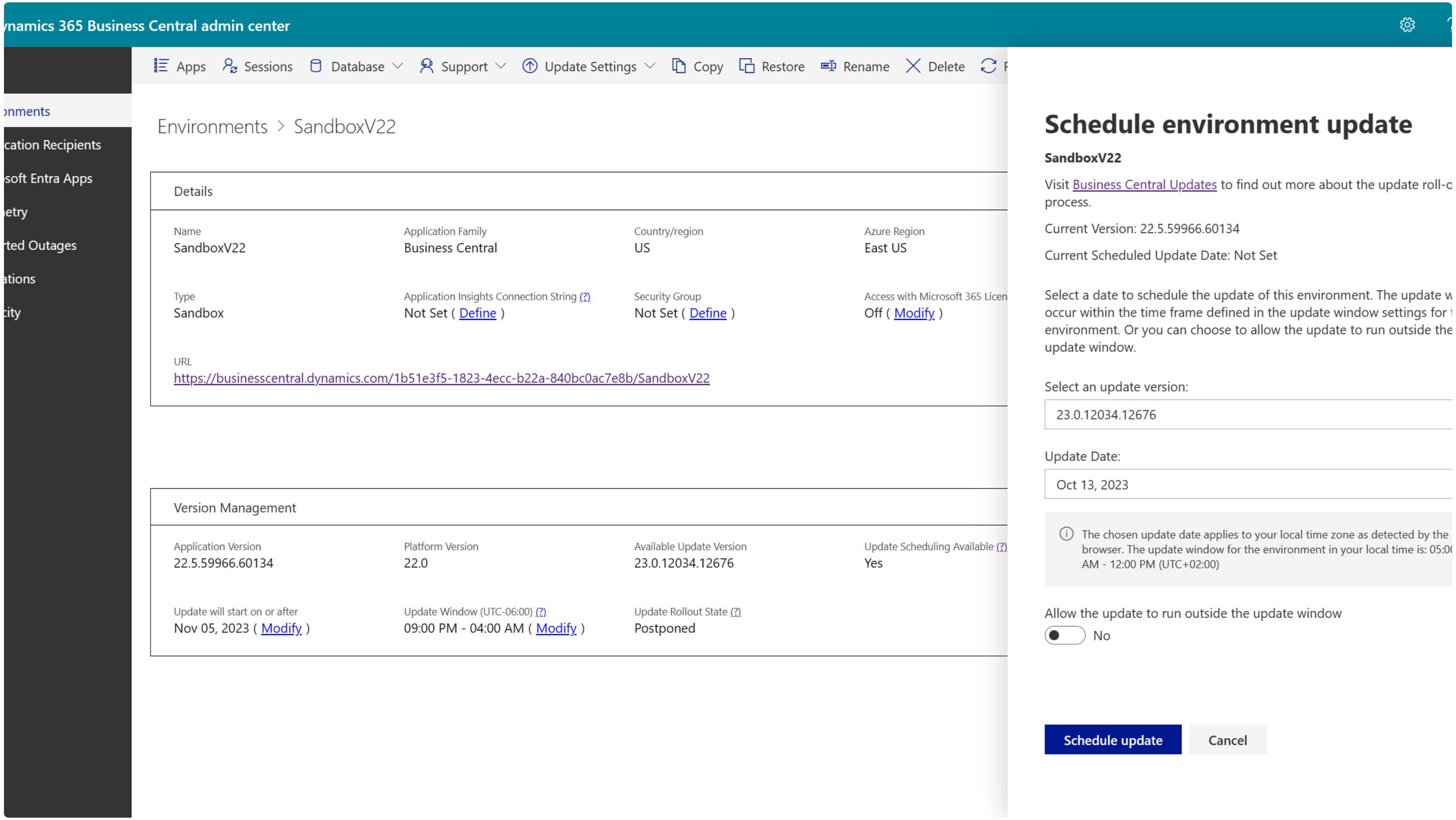
#37: Take control of when updates occur

Note the new update rules(!)



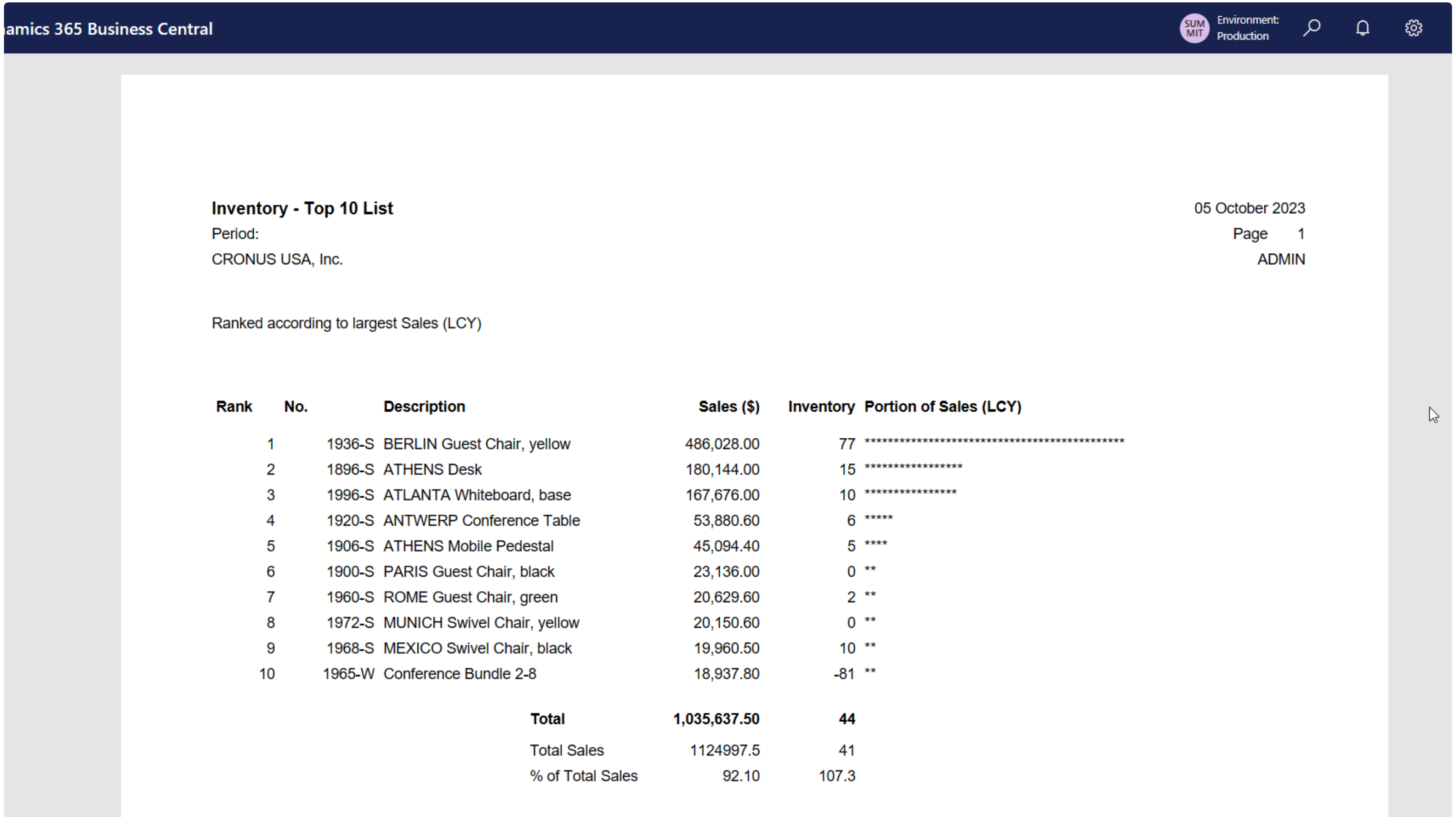
#37: Take control of when updates occur

Note the new update rules(!)



Tip # 38

#38: Easily create an Excel layout for a report



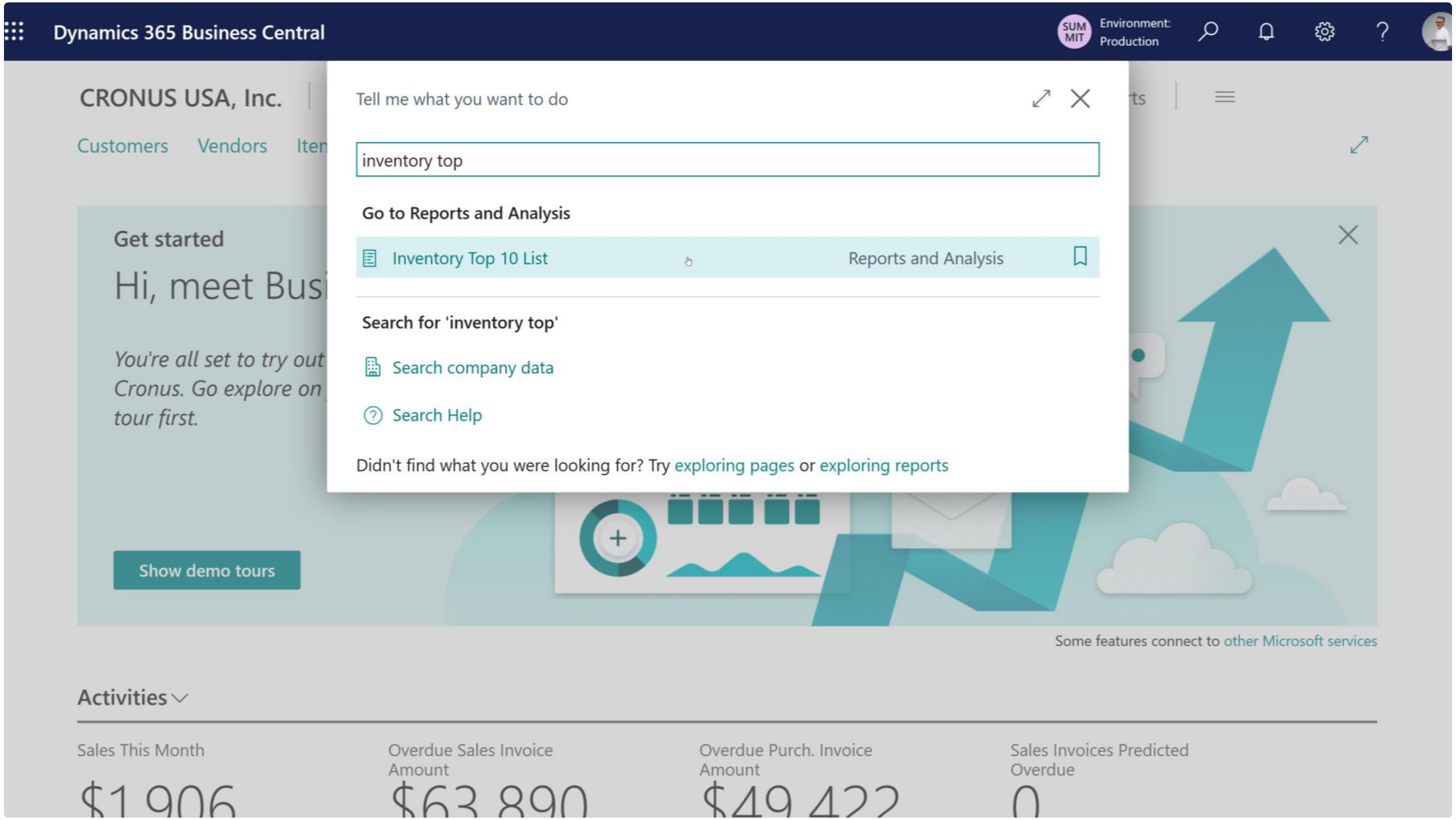
Inventory - Top 10 List
Period:
CRONUS USA, Inc.

05 October 2023
Page 1
ADMIN

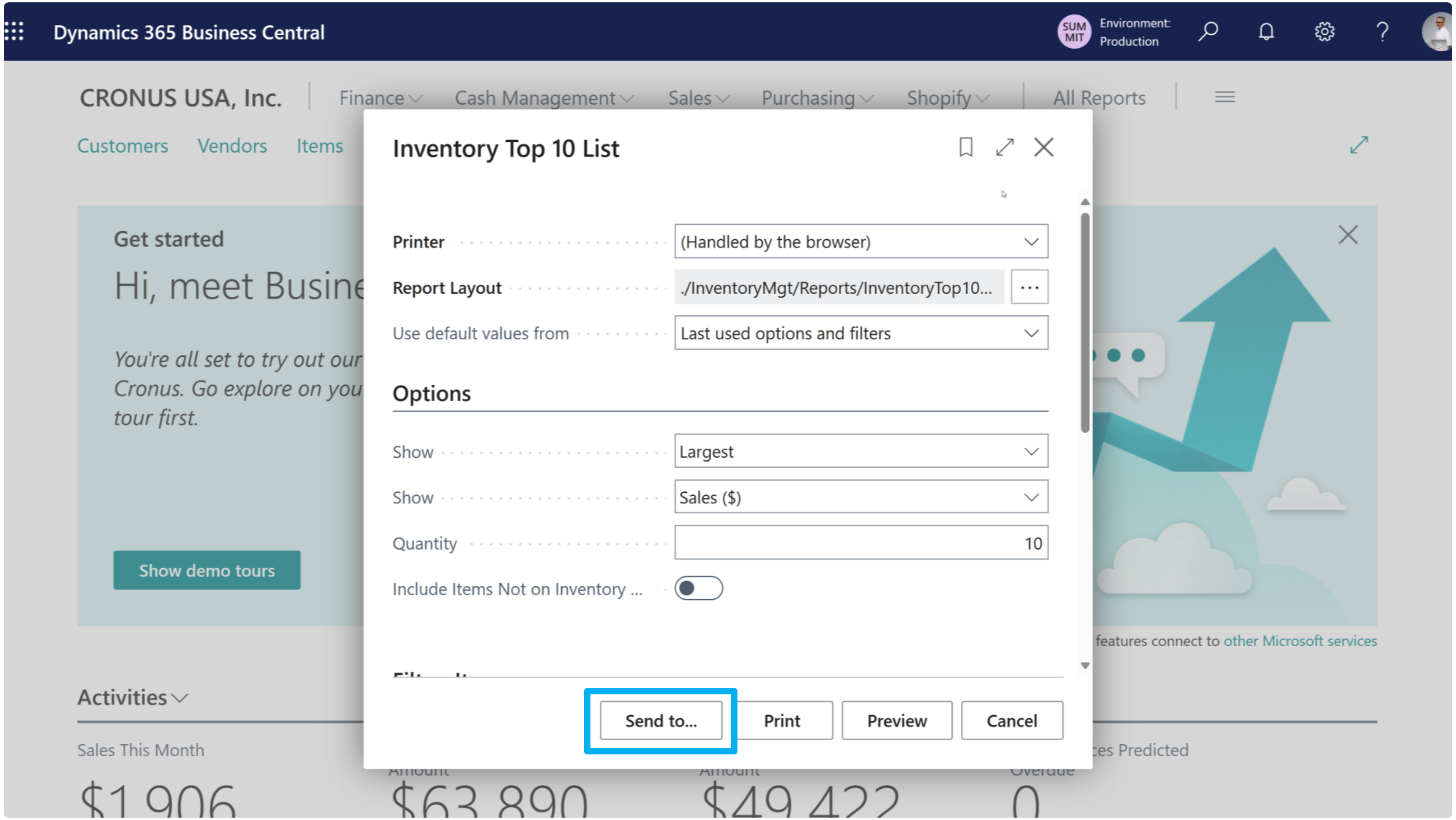
Ranked according to largest Sales (LCY)

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



#38: Easily create an Excel layout for a report



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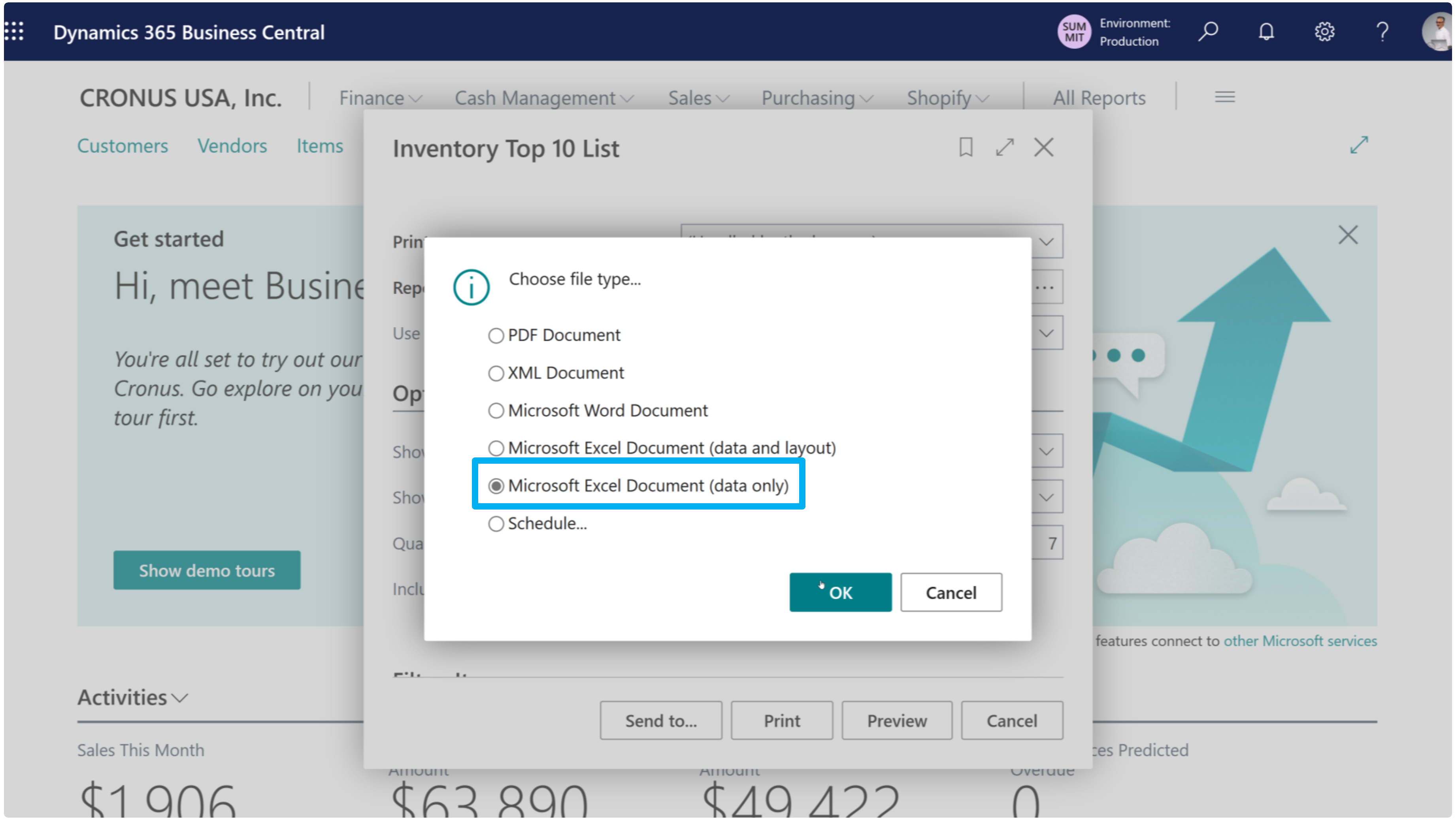

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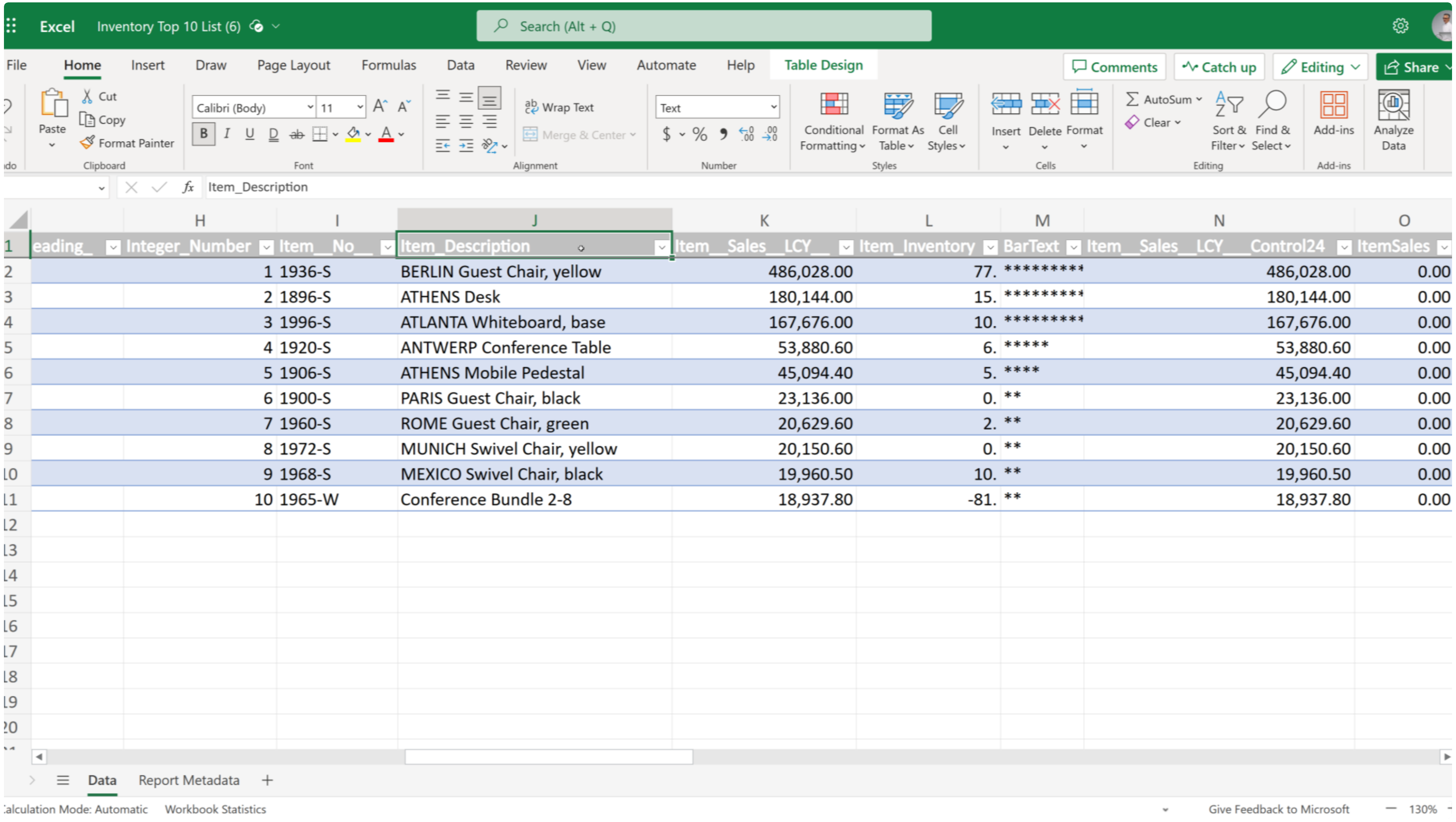
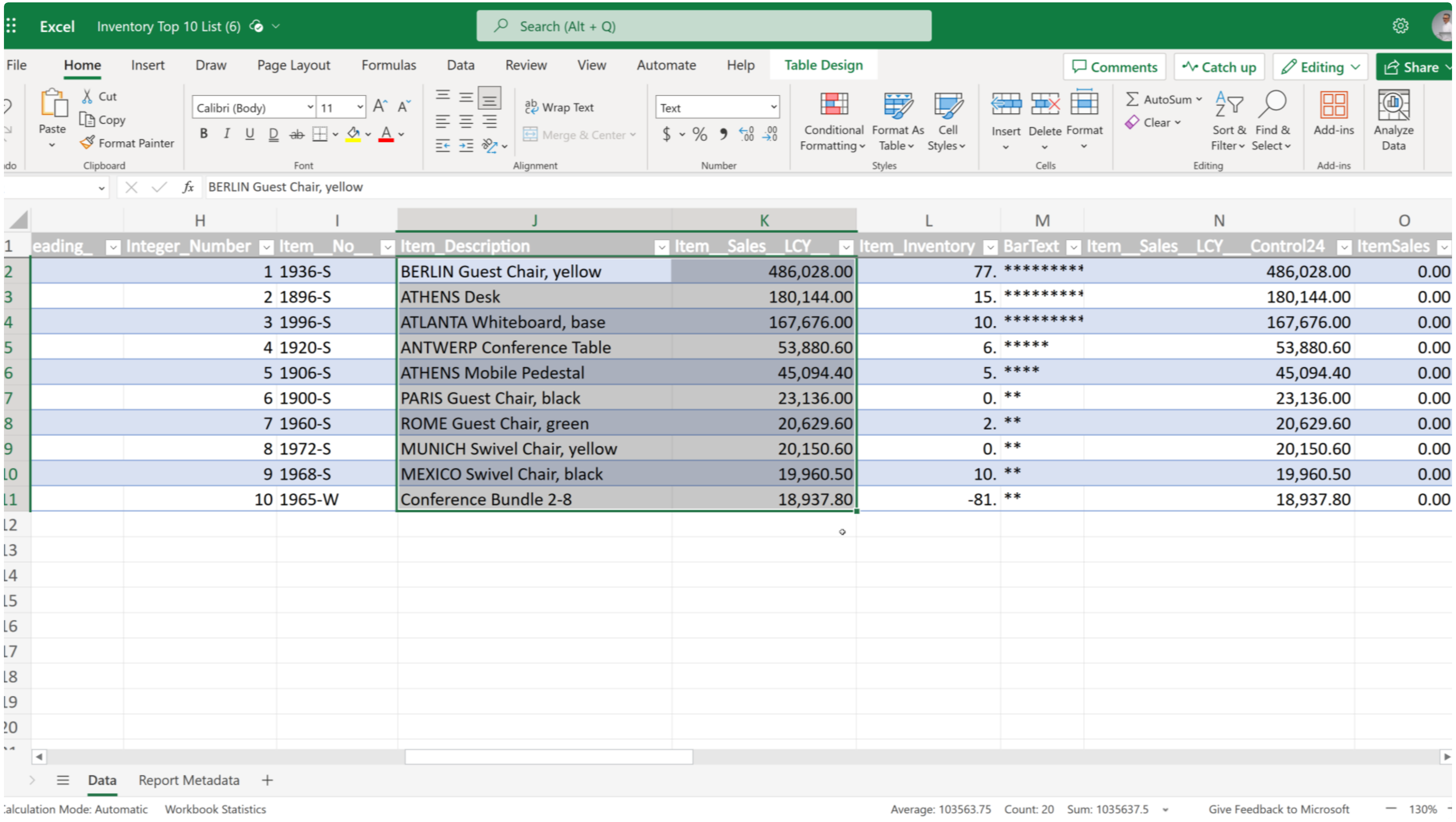


#38: Easily create an Excel layout for a report



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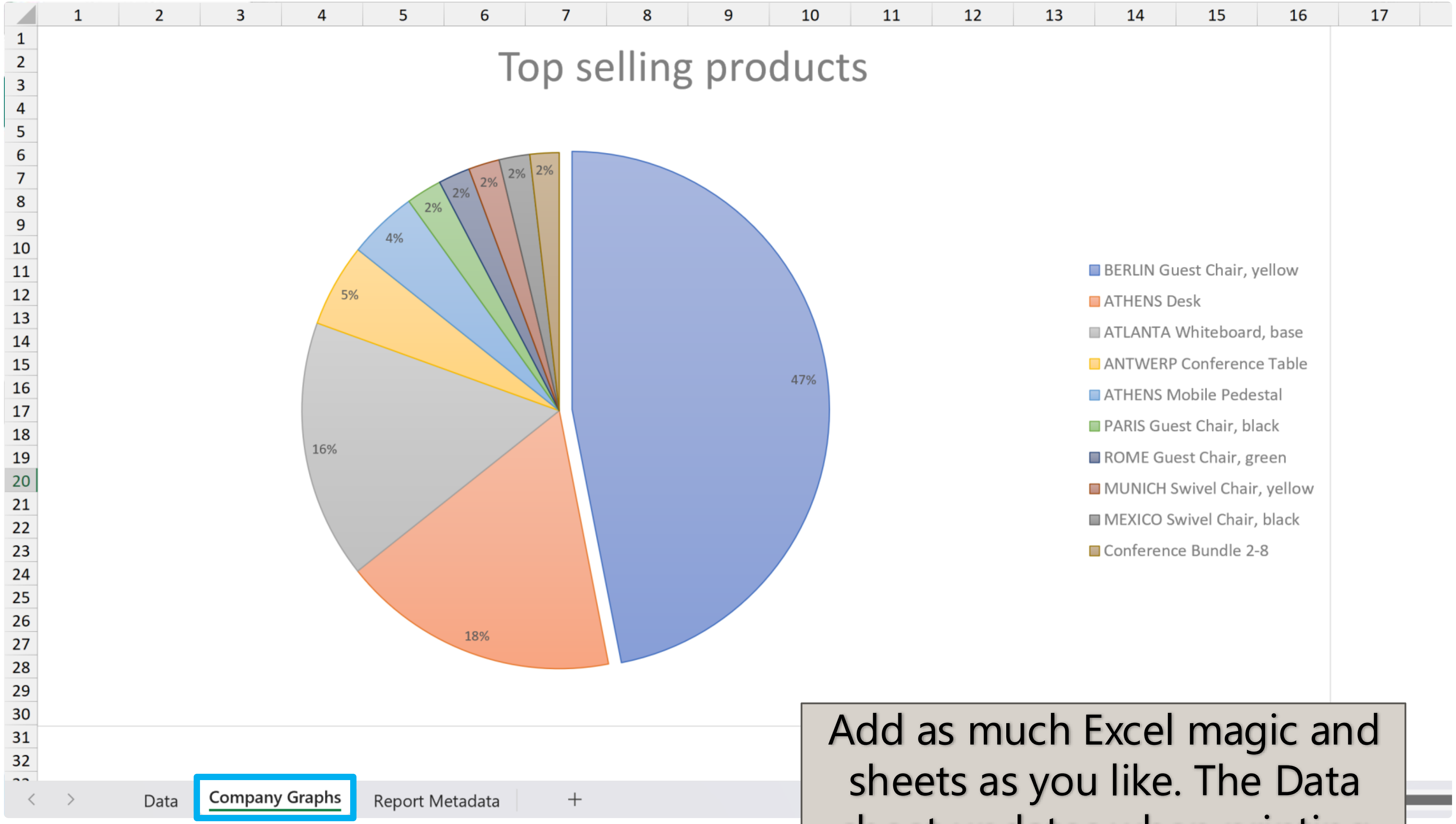
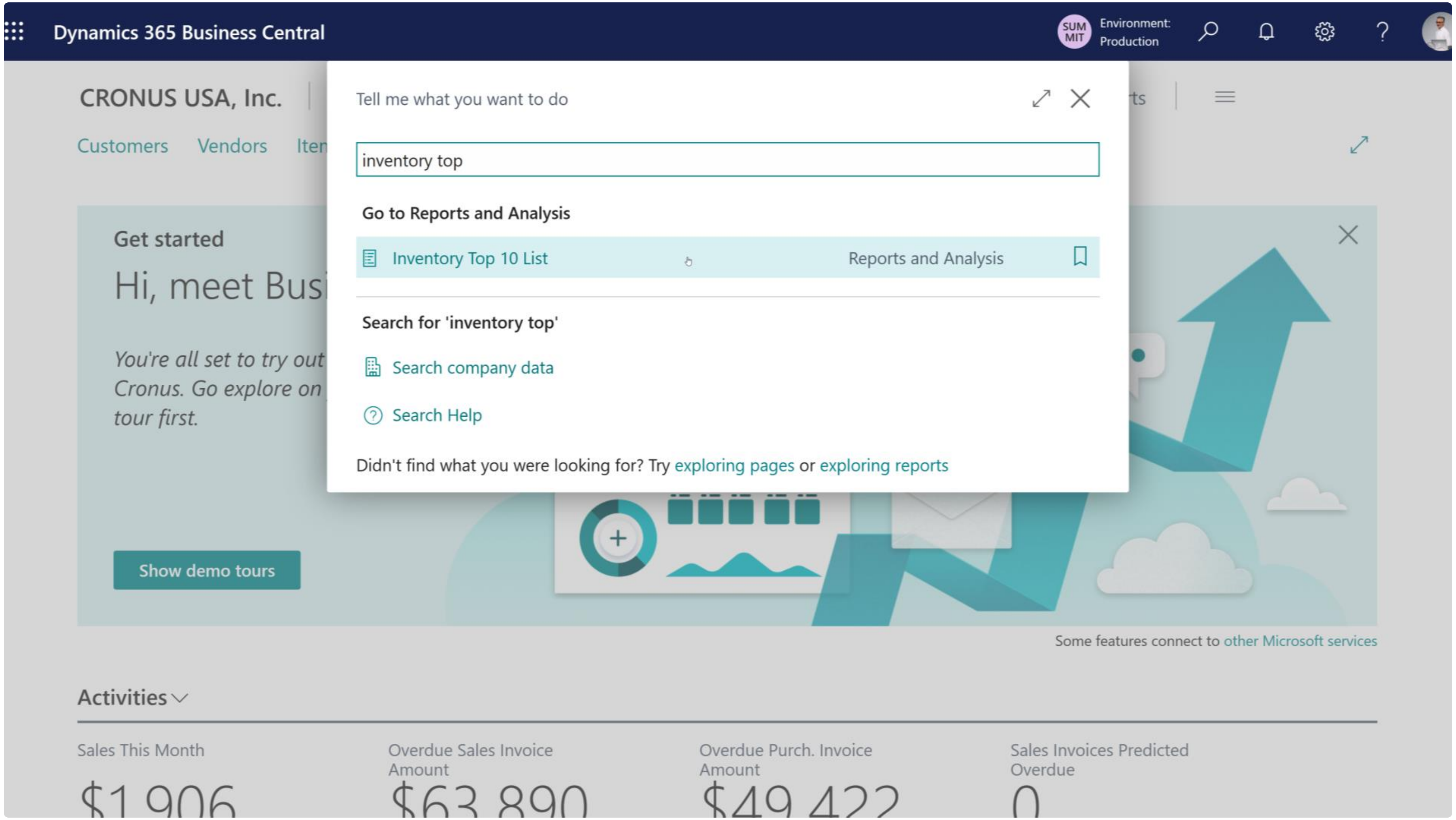


Add as much Excel magic and sheets as you like. The Data sheet updates when printing

#38: Easily create an Excel layout for a report



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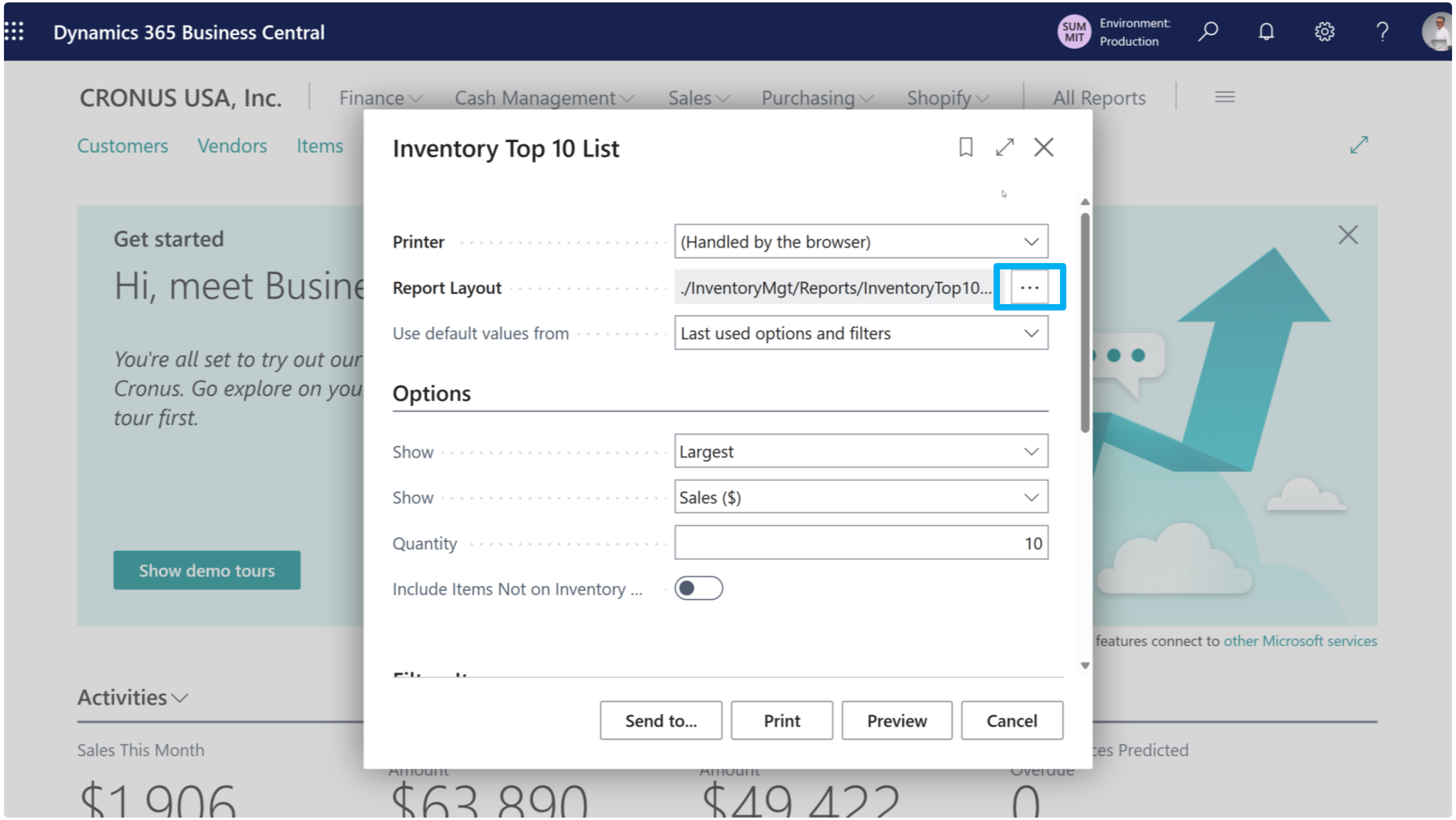

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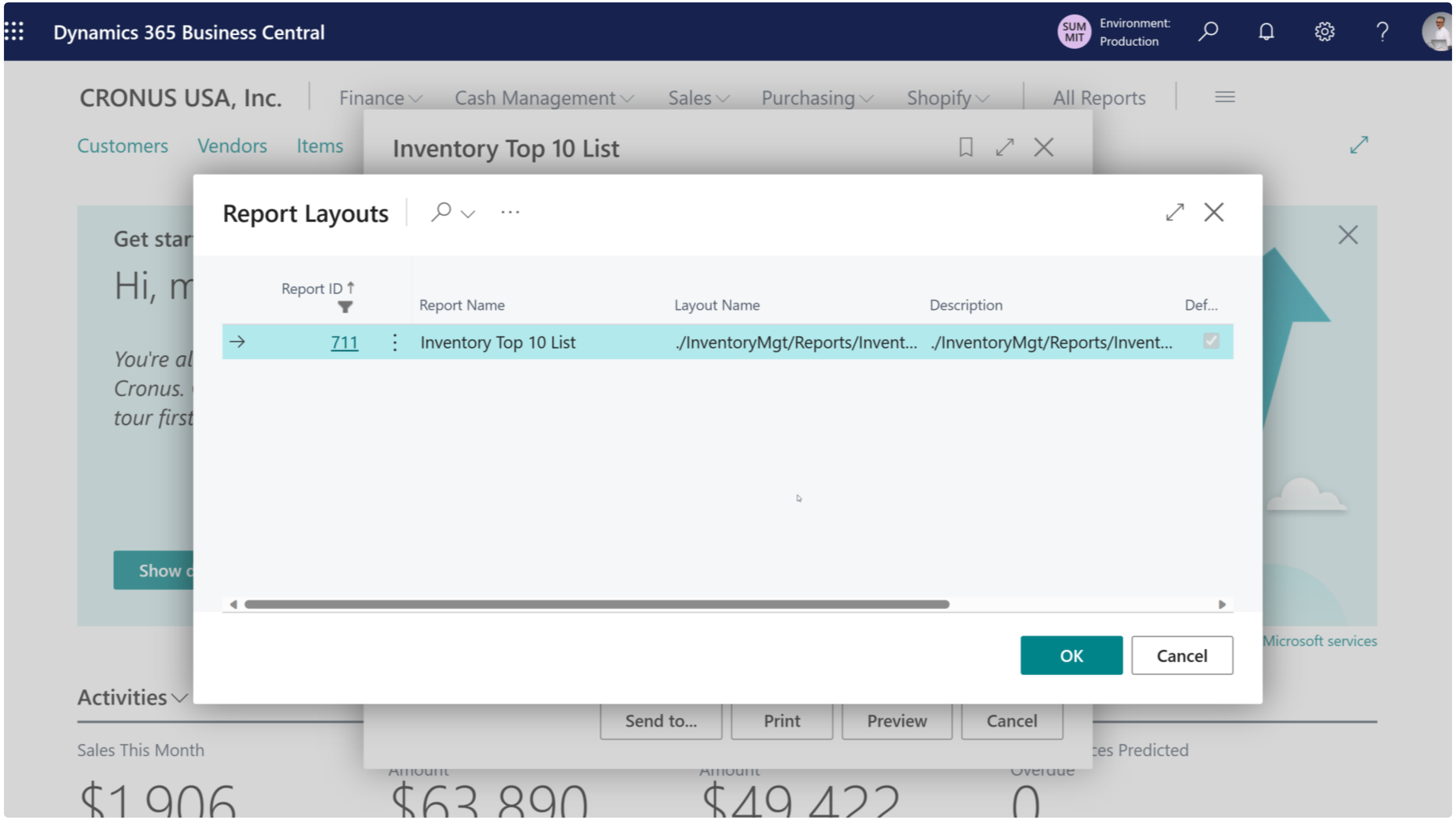

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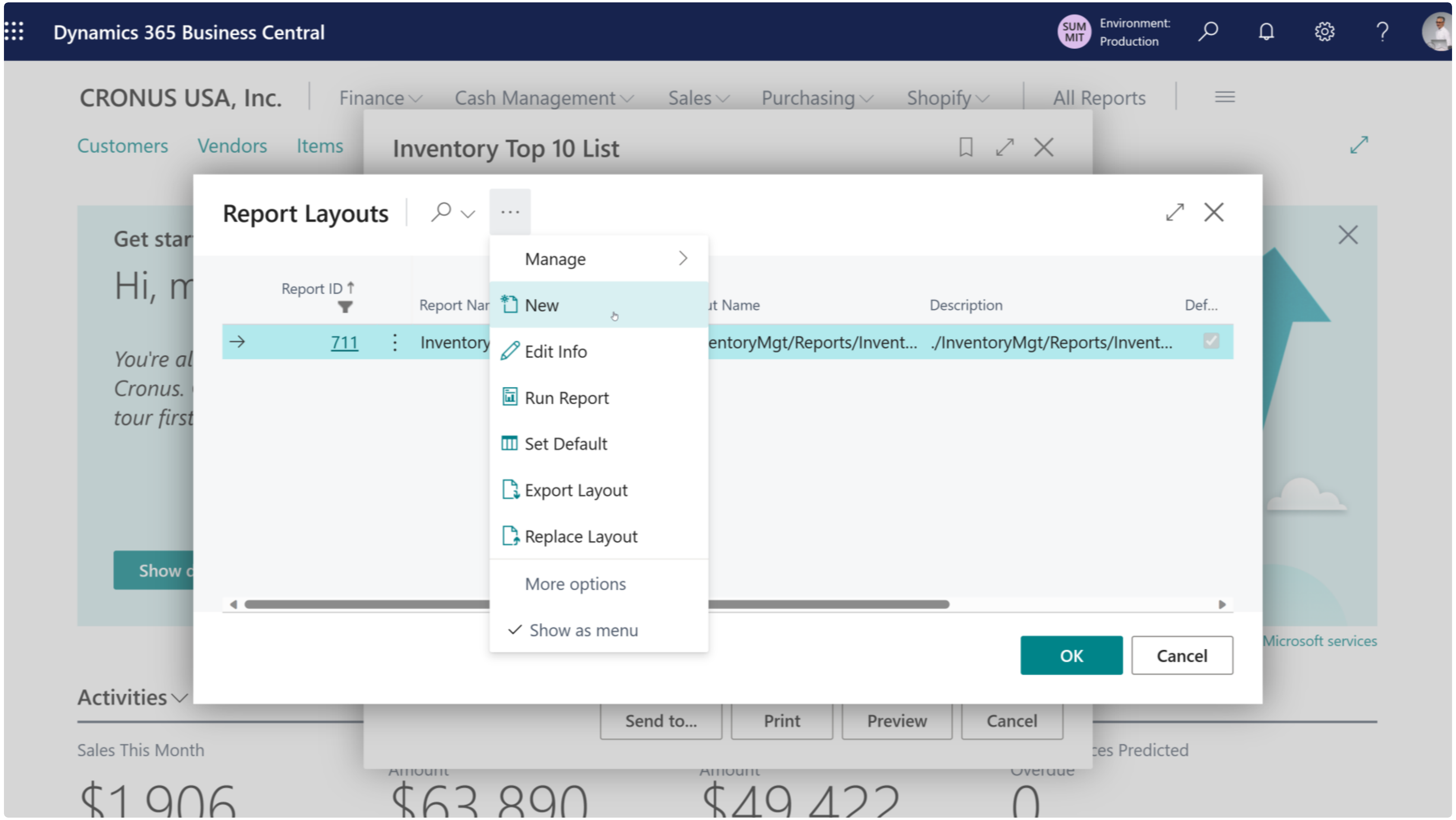

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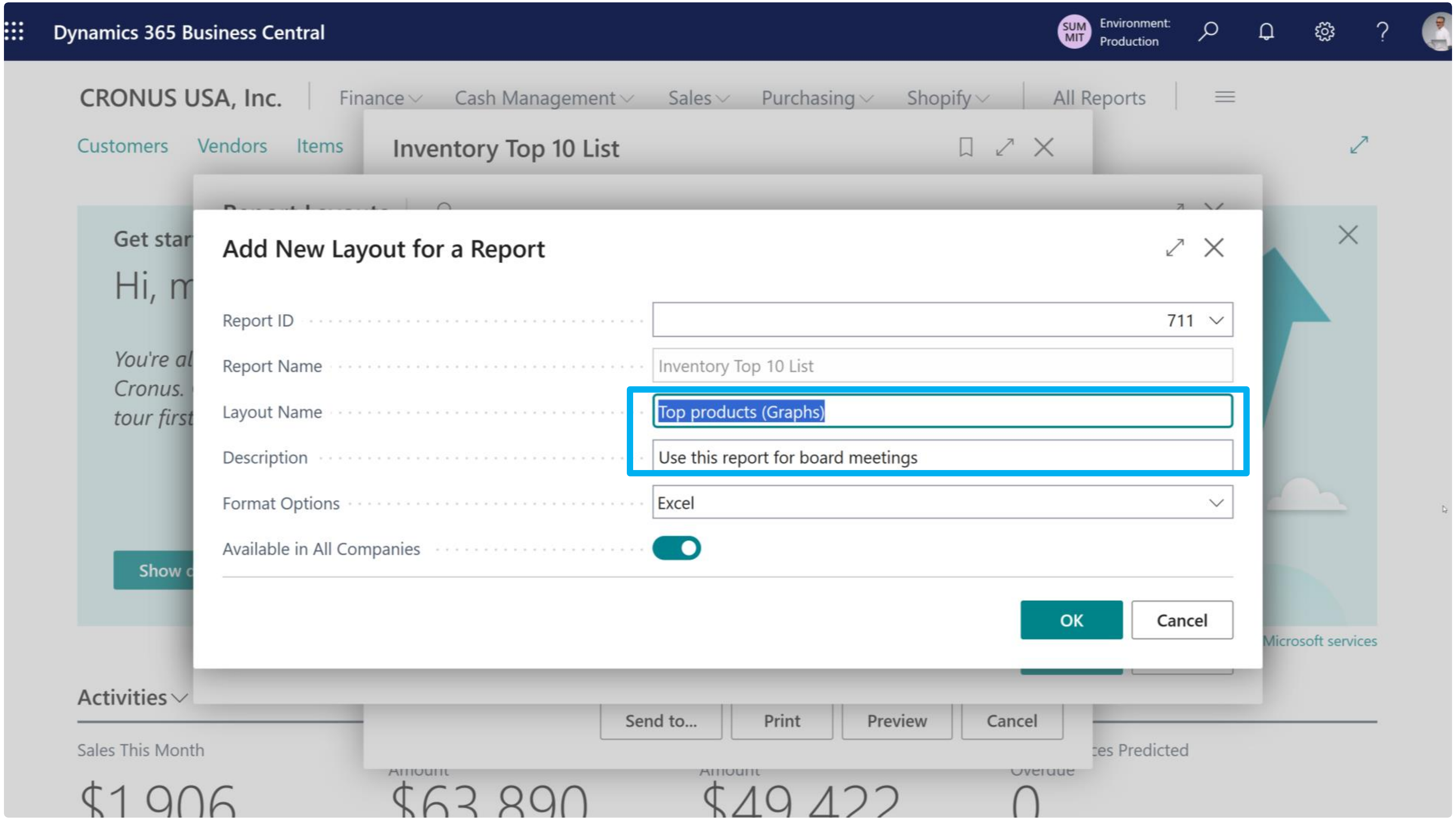

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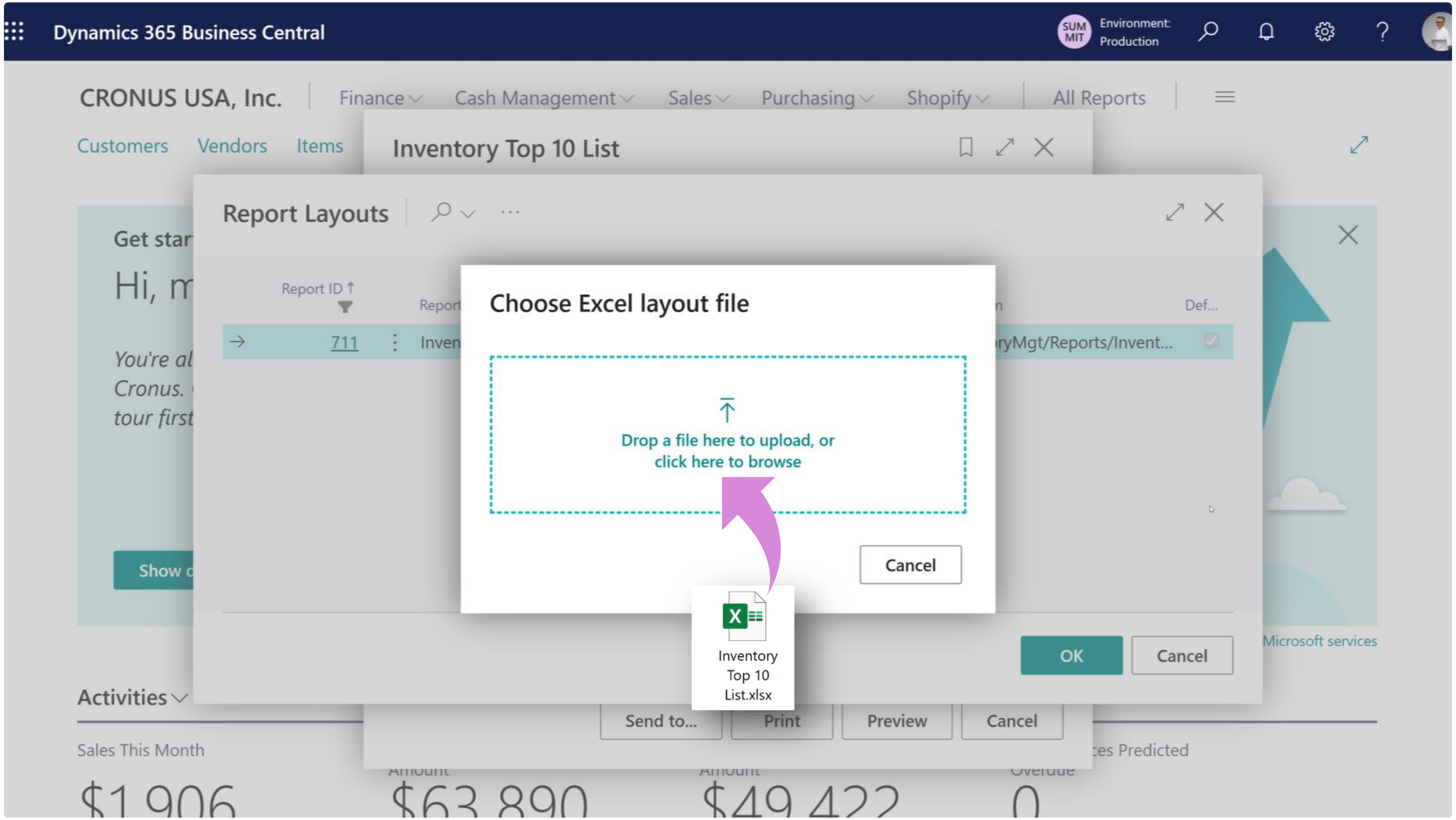
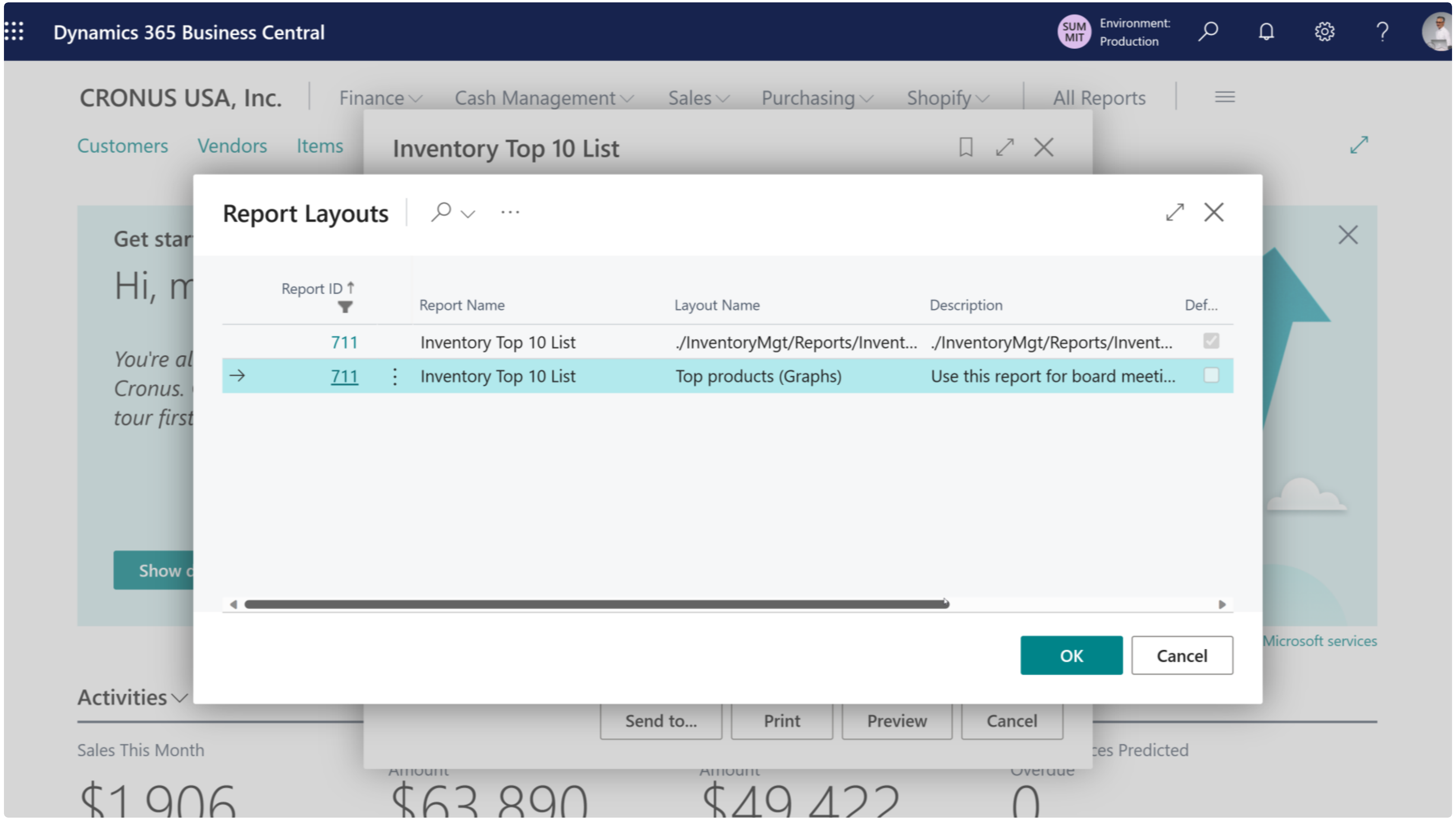
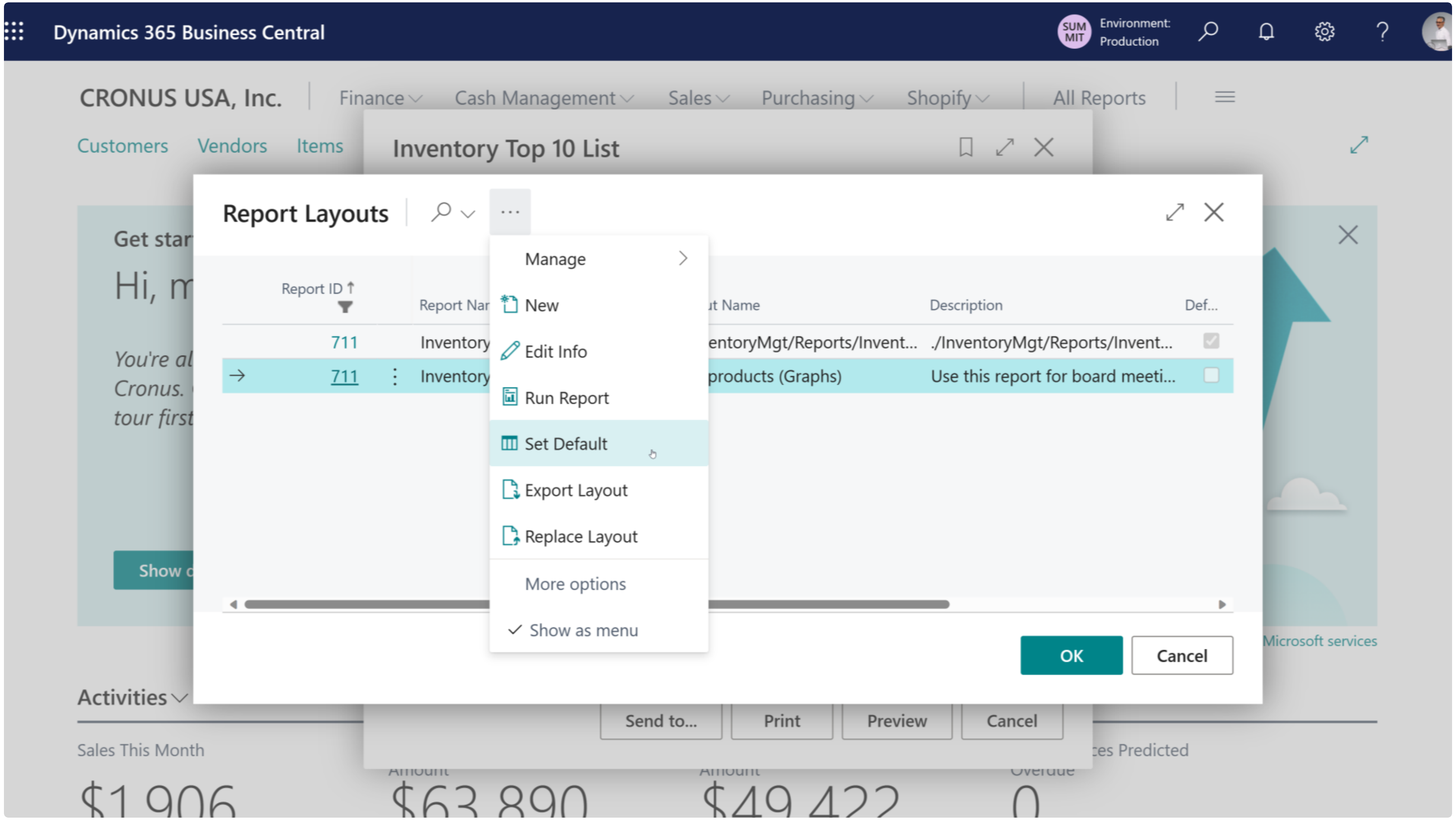


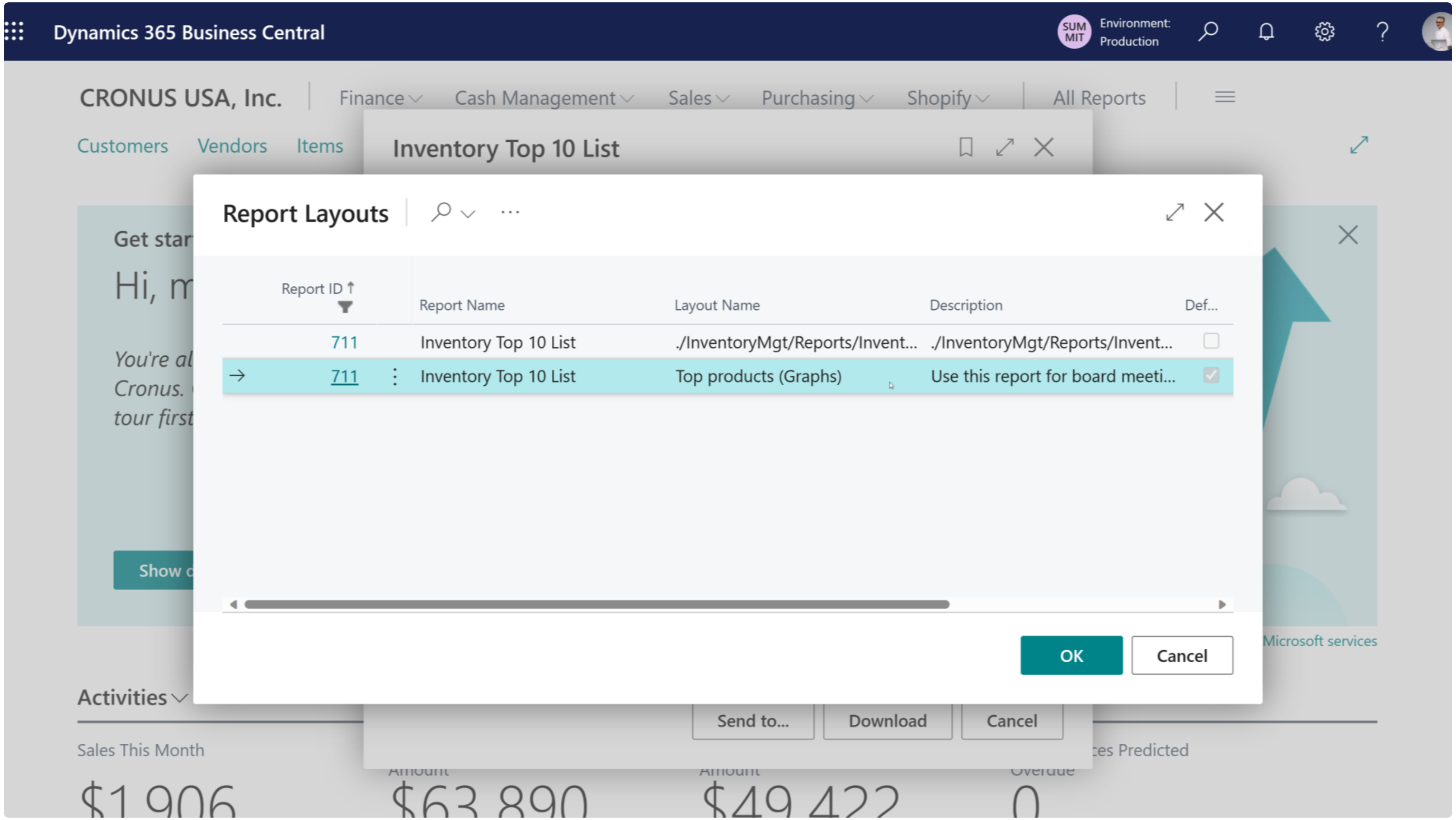
#38: Easily create an Excel layout for a report



#38: Easily create an Excel layout for a report



#38: Easily create an Excel layout for a report



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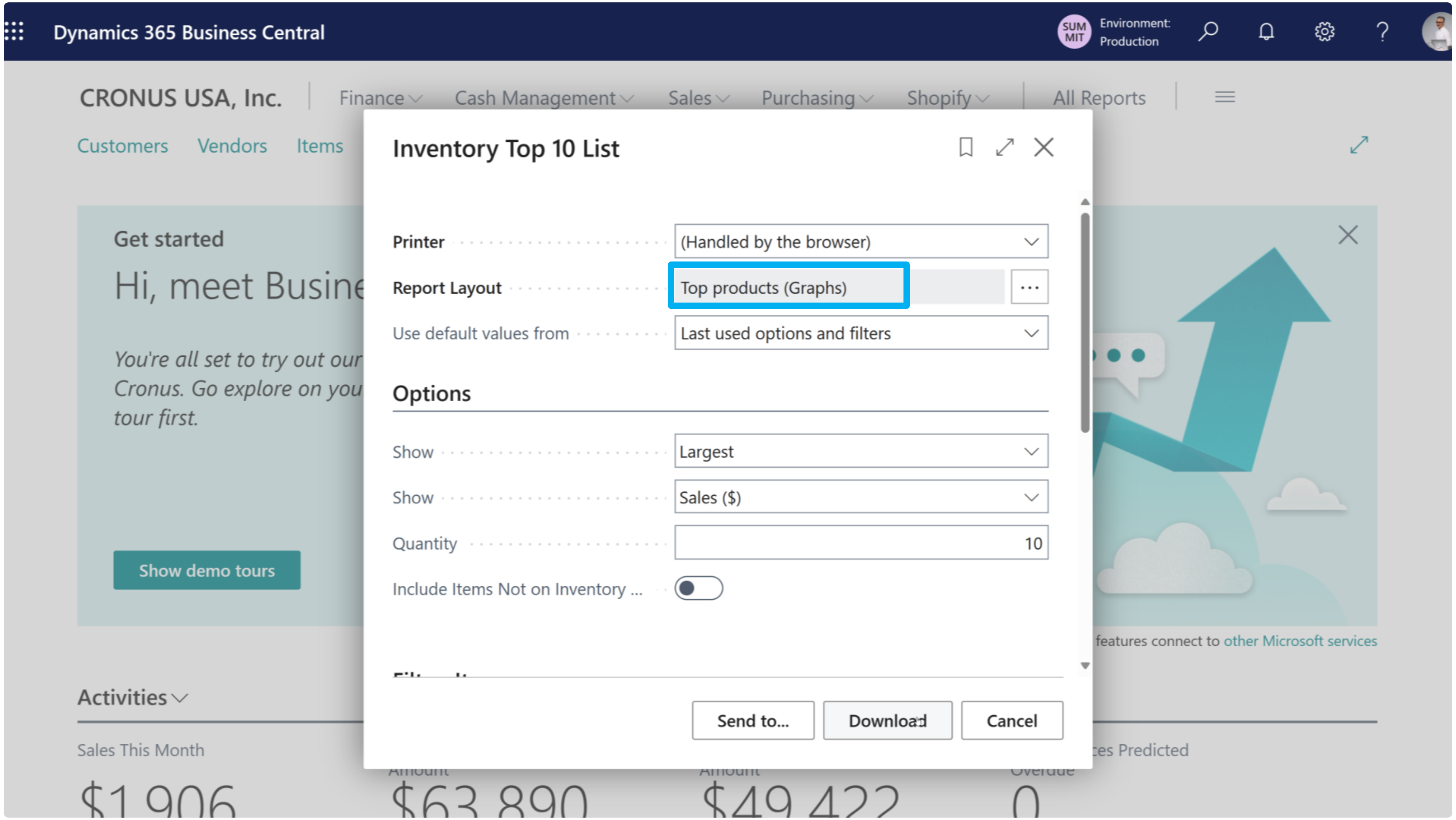
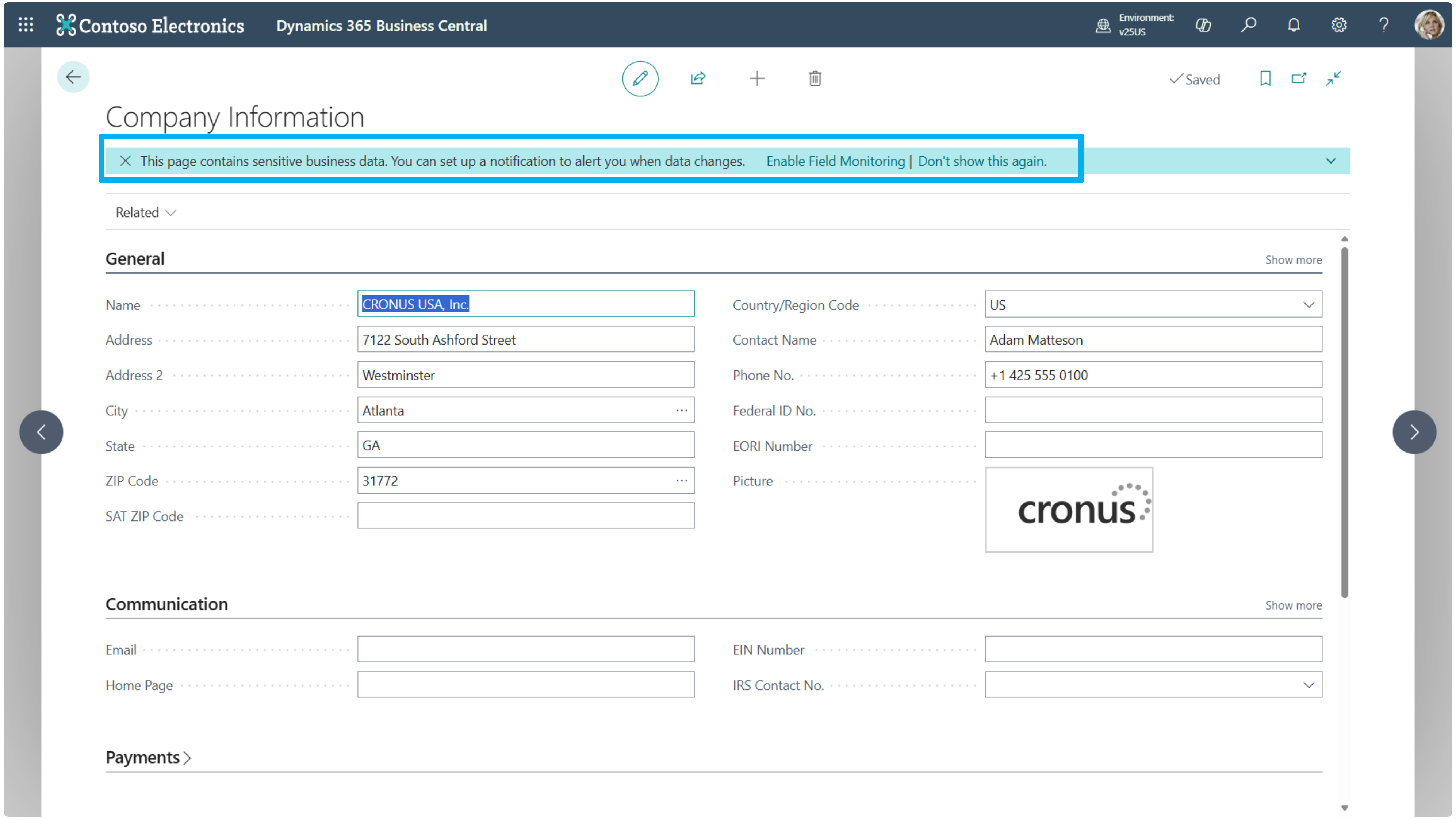


#38: Easily create an Excel layout for a report

Tip # 39

#39: Monitor sensitive fields



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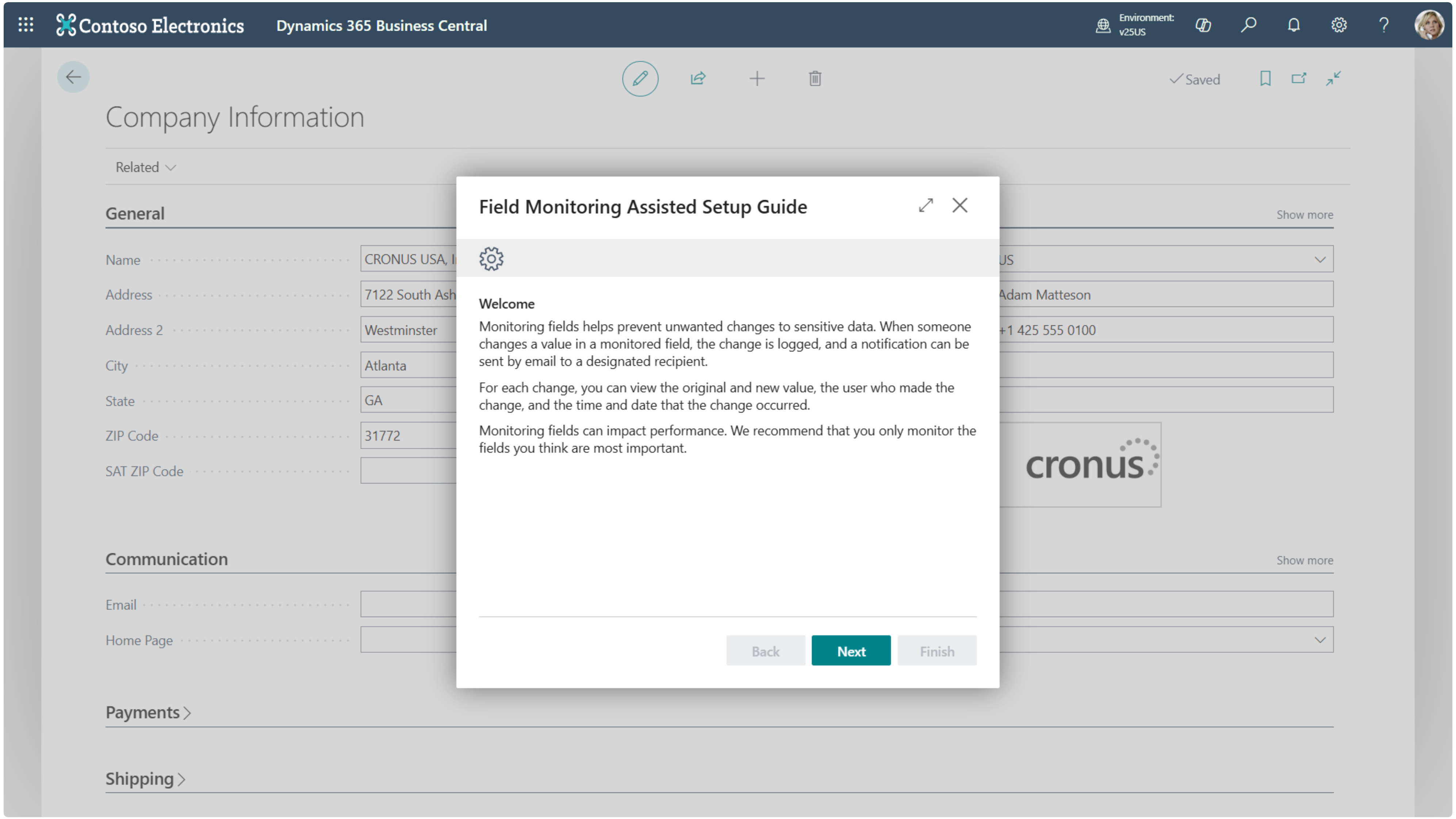

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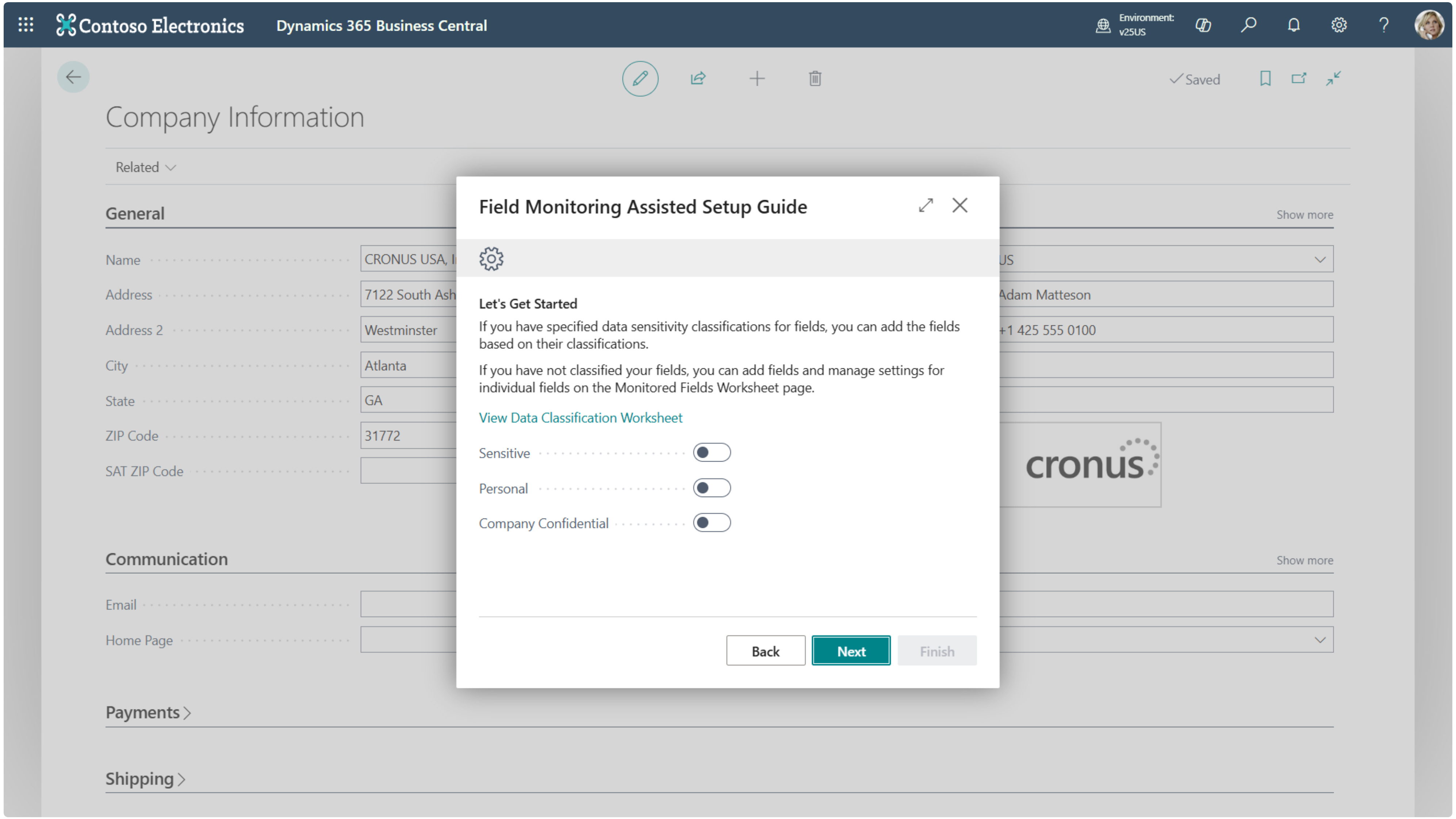
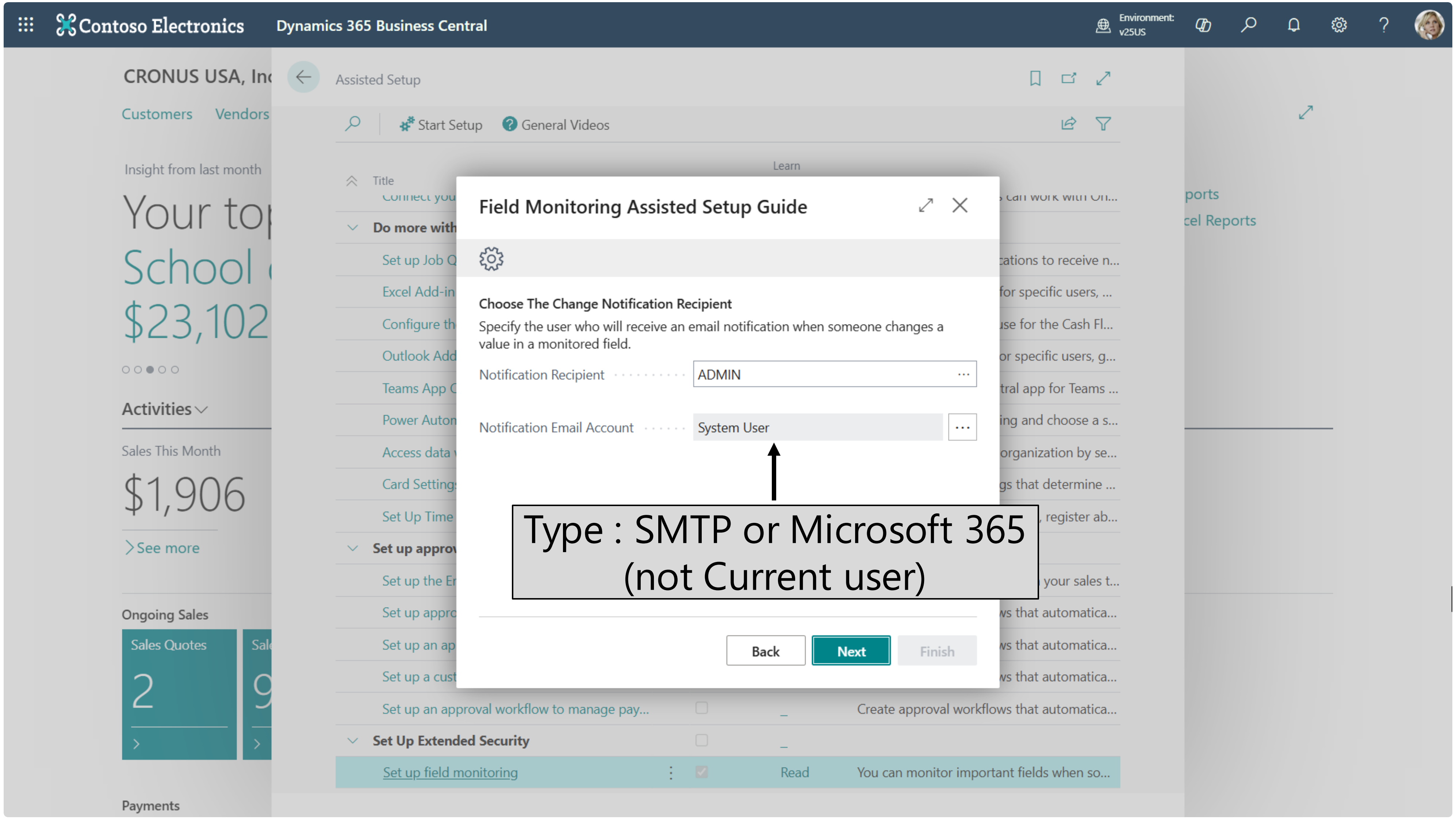
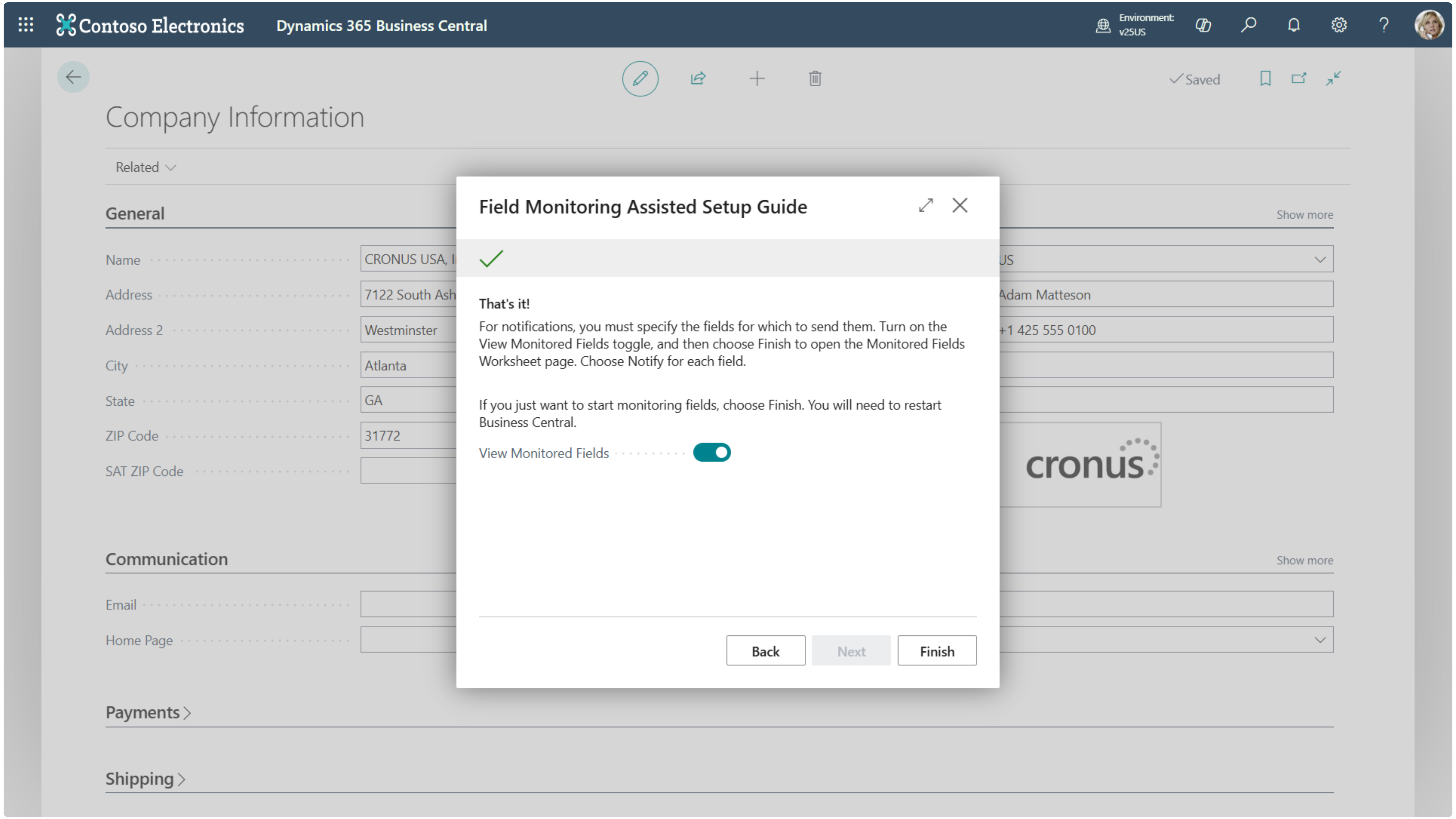


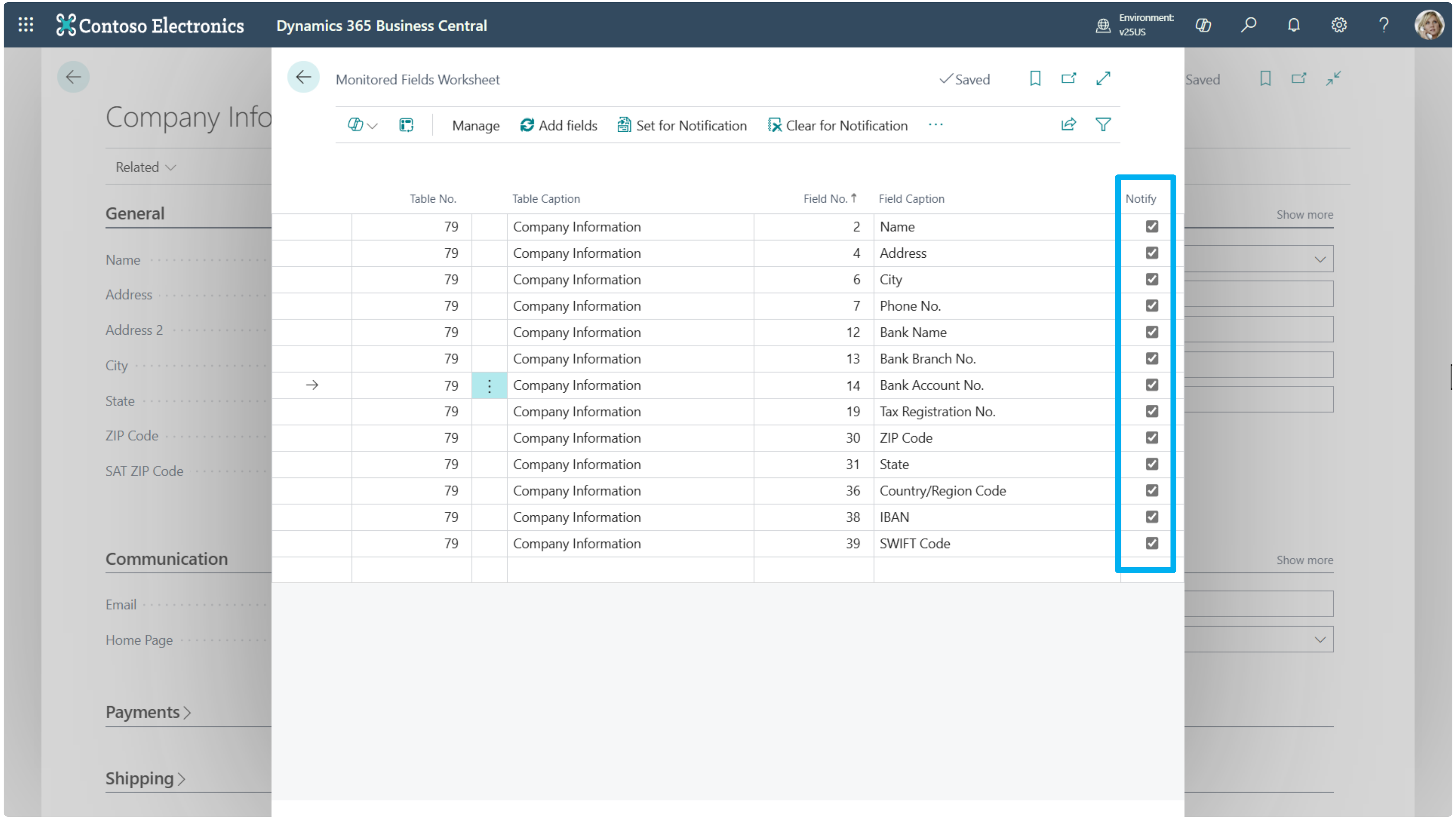
#39: Monitor sensitive fields



#39: Monitor sensitive fields



#39: Monitor sensitive fields



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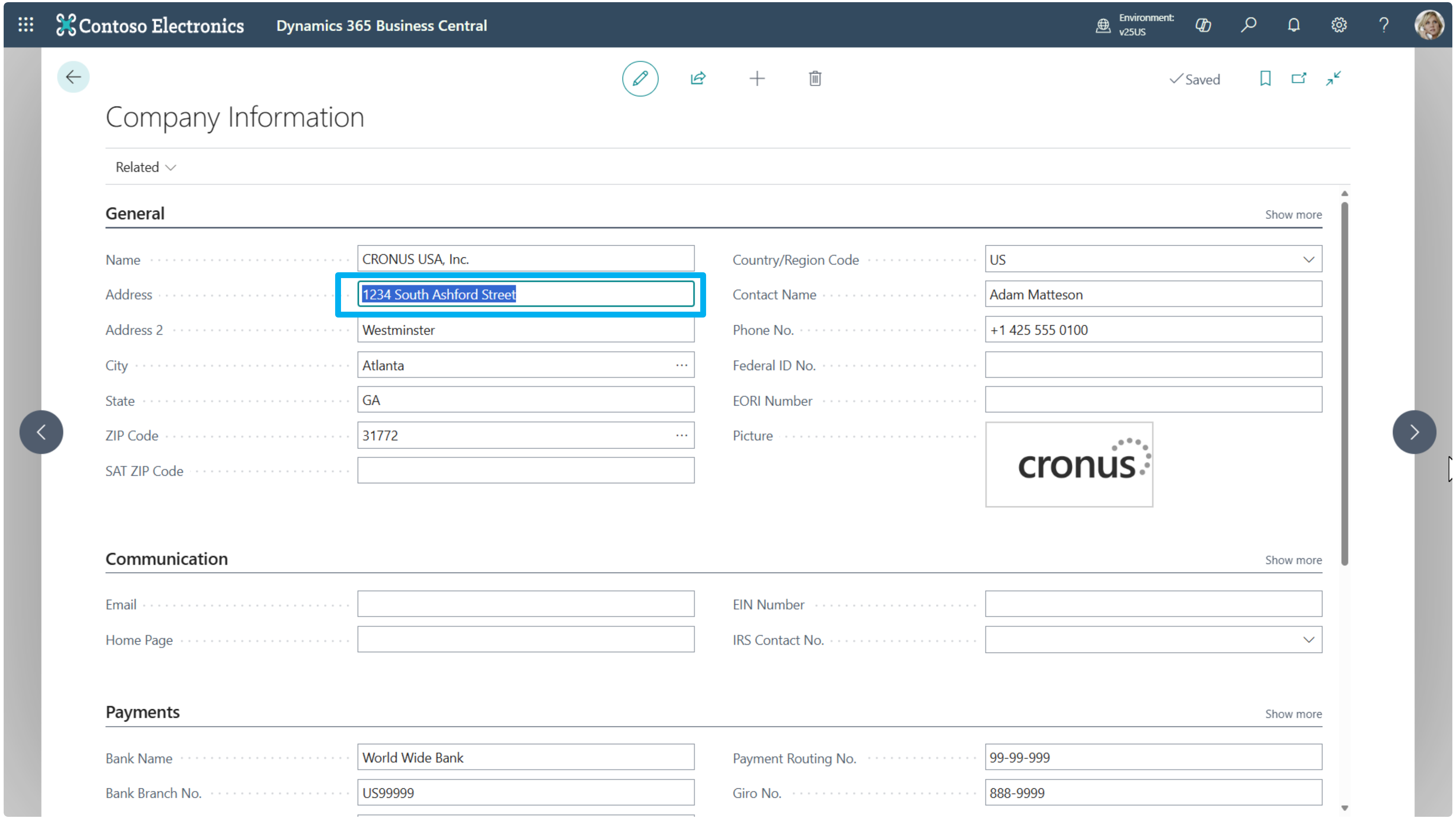


#39: Monitor sensitive fields

Business Central Extended Security - Monitored Change Notification

Ester Henderson

To: Ester Henderson

Mon 14/10/2024 12:04

You are signed up to receive email notifications when certain data is changed in the CRONUS USA, Inc. company in Microsoft Dynamics 365 Business Central.
This message is to inform you that the following change was made:

Extended Security has detected a change in a Company Information field marked for monitoring:
Original "Address" Value: 3782 South Ashford Street
New "Address" Value: 1234 South Ashford Street
Changed By: ADMIN
Changed Date/Time: 10/14/24 12:04 PM

Effective permissions for user ADMIN allowed for this change.

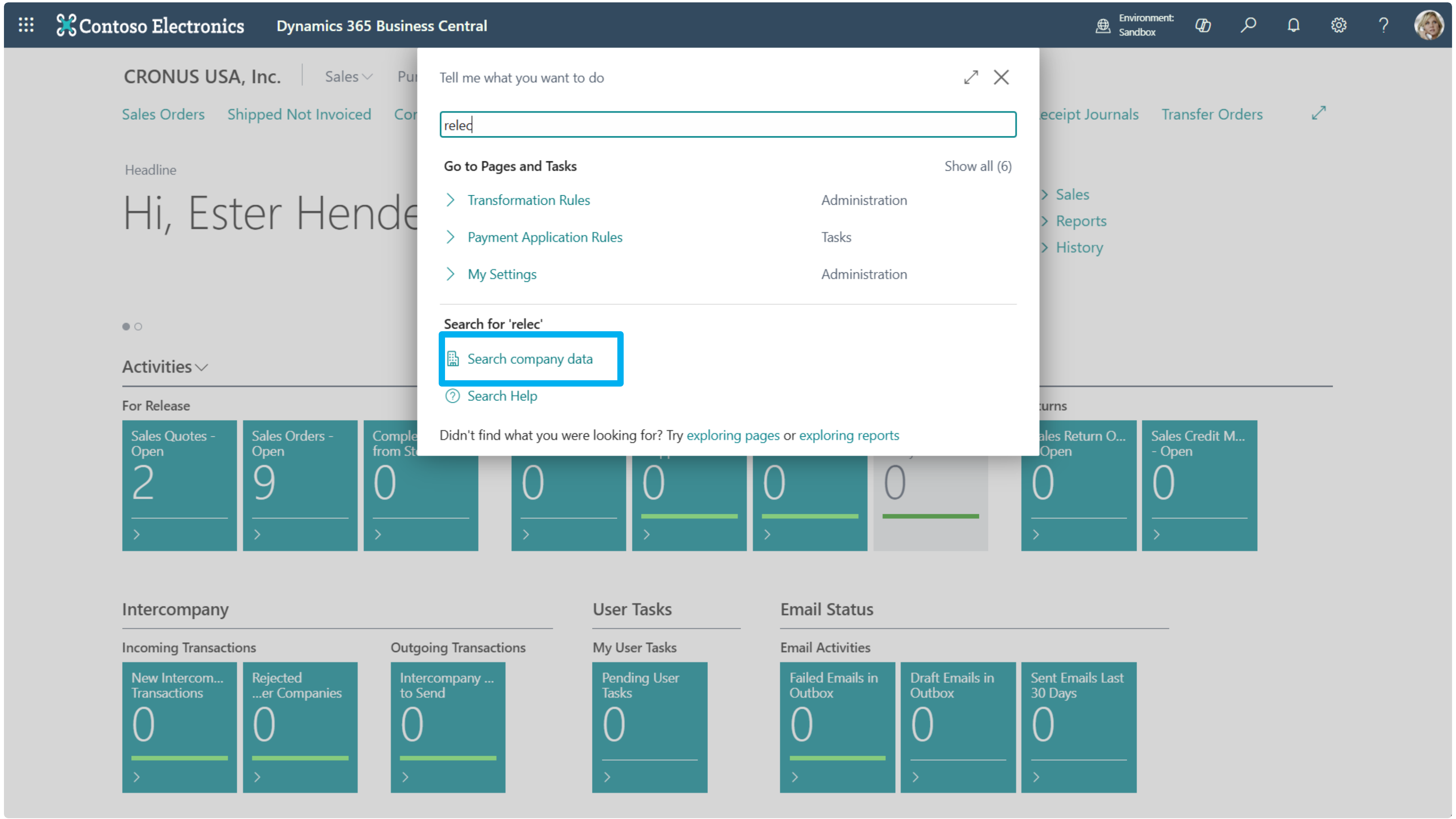
Notification messages are sent automatically and cannot be replied to.

Reply Forward

Tip # 40

#40: Fine tune which data is searched – per role

Don't search tables you never need to search



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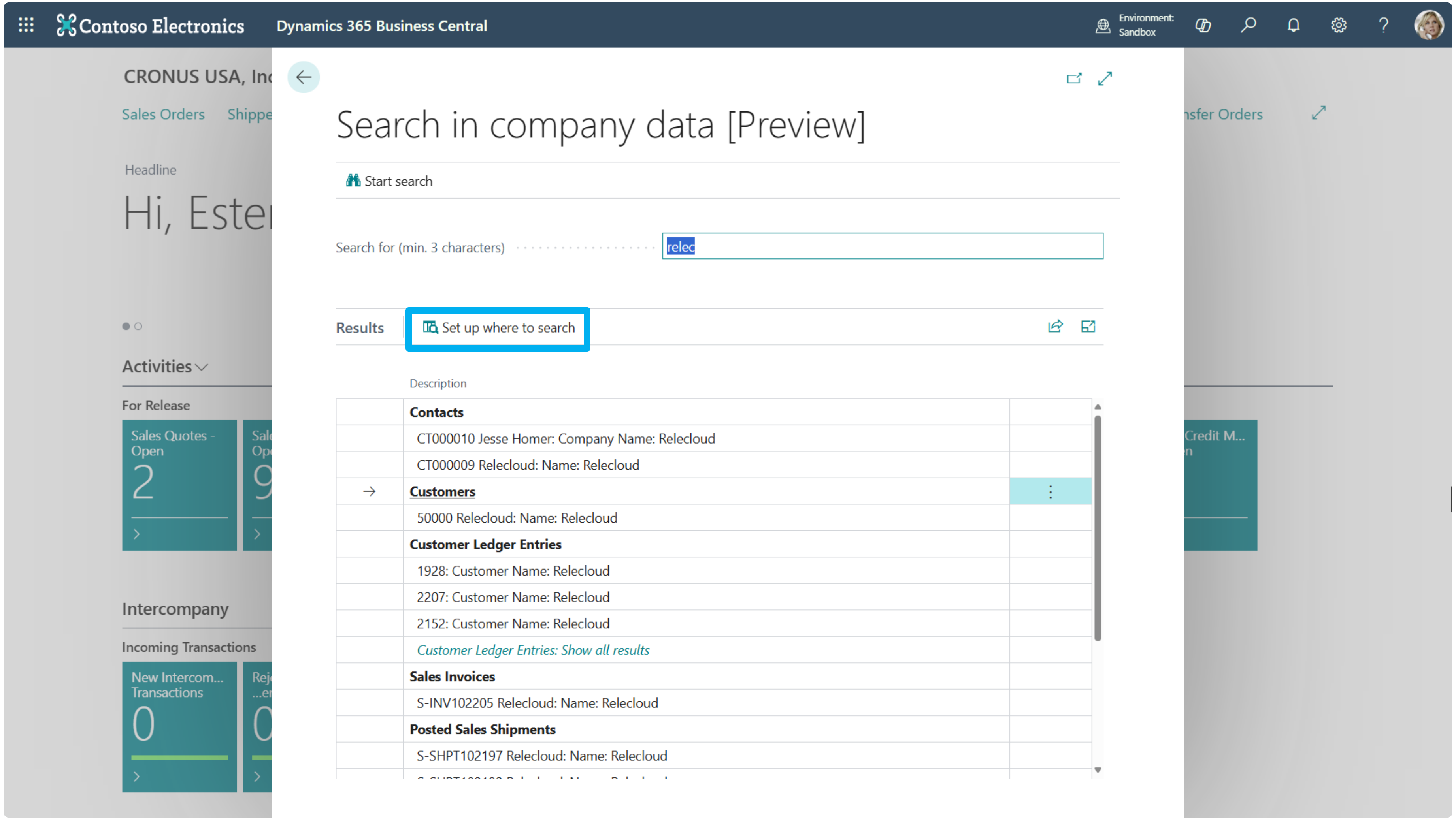
Don't search tables you never need to search



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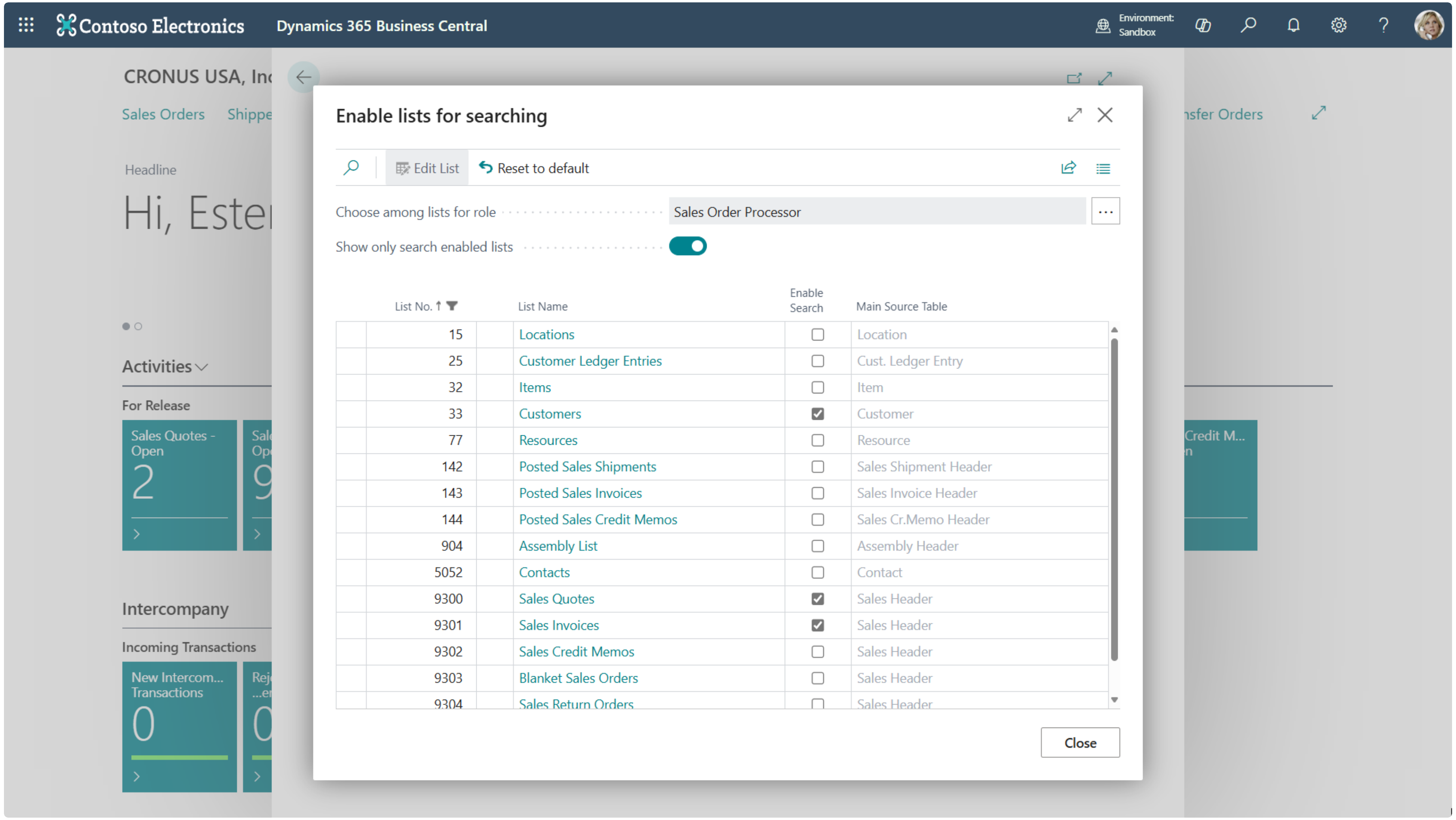

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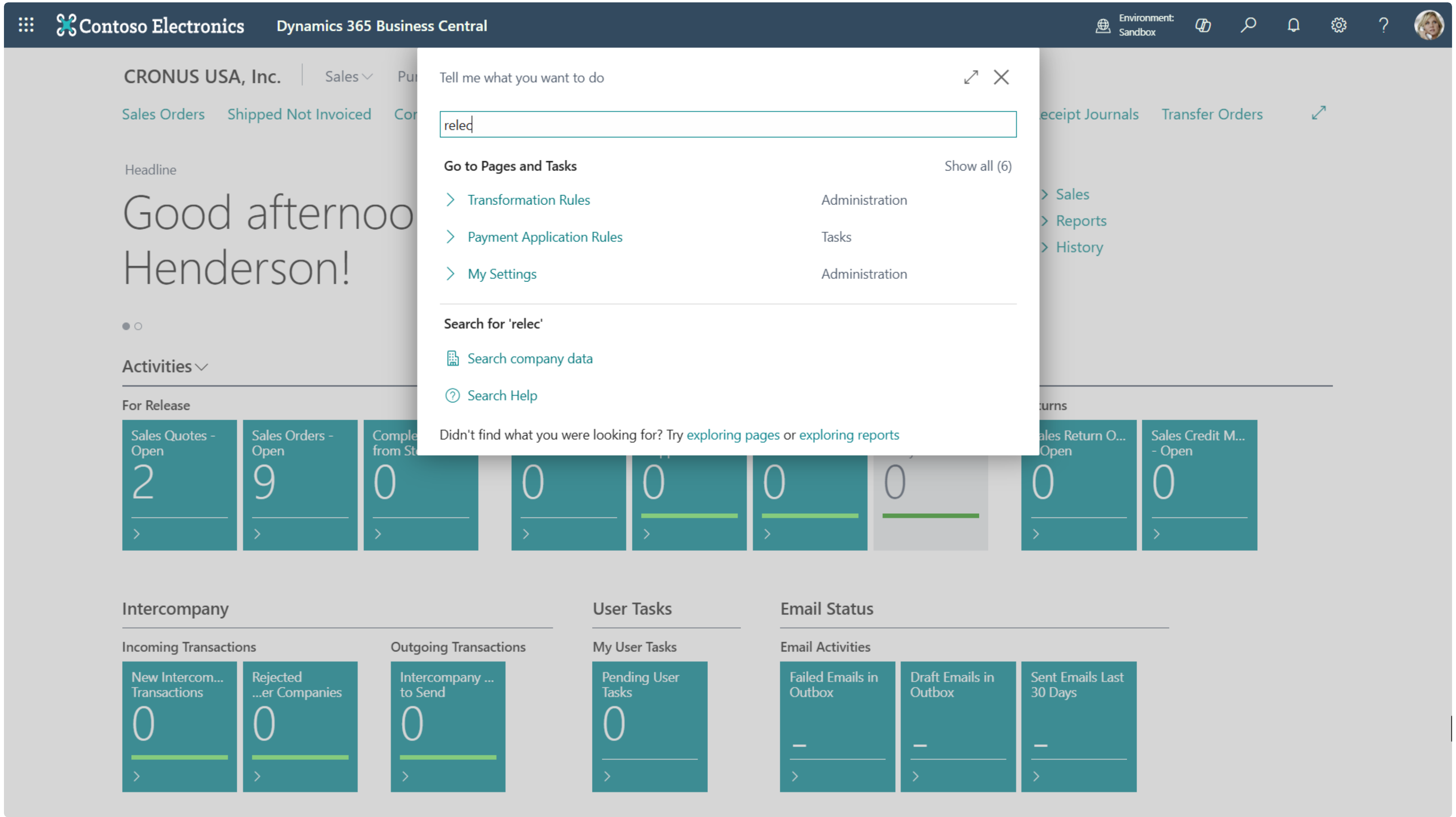

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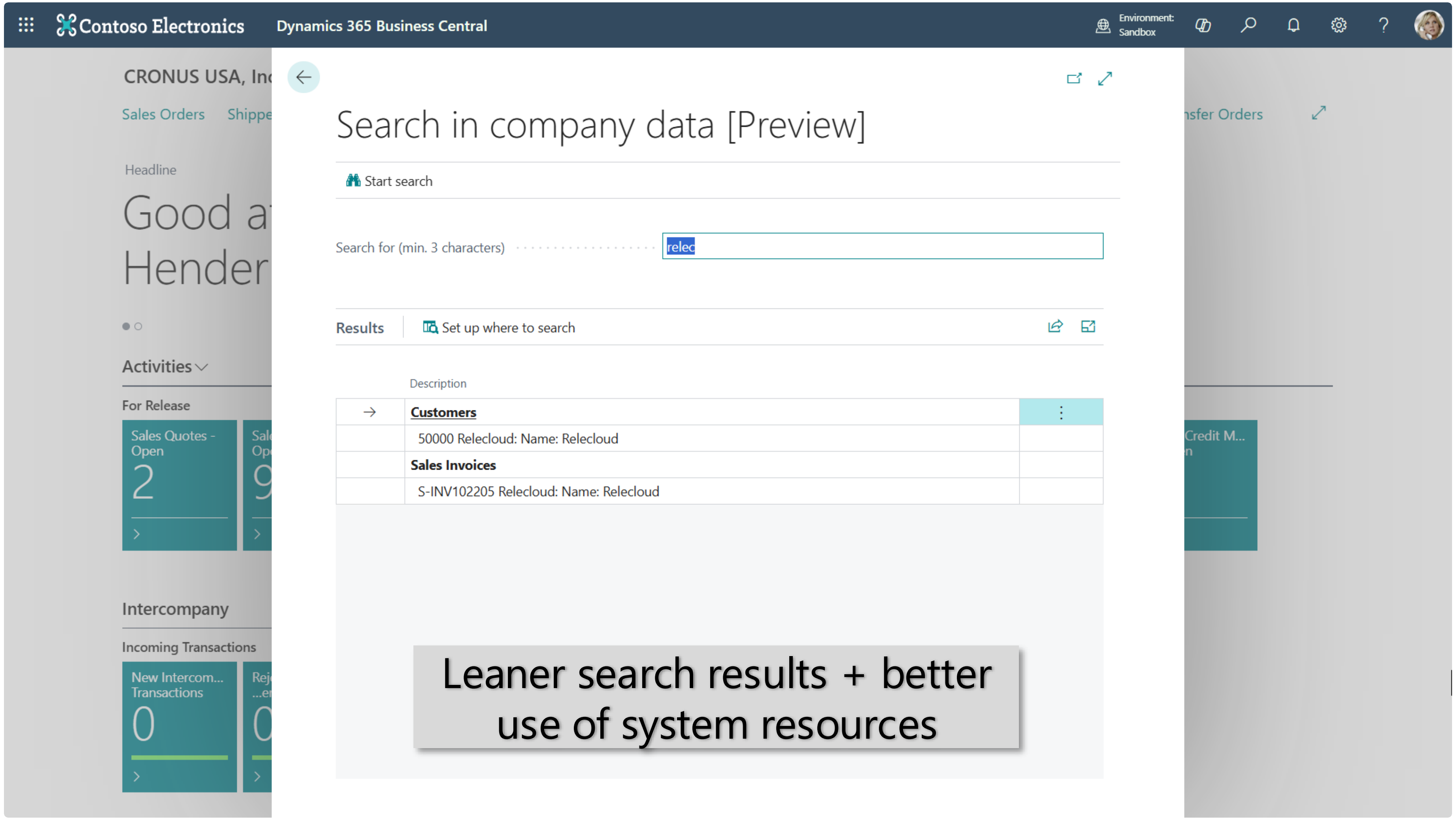
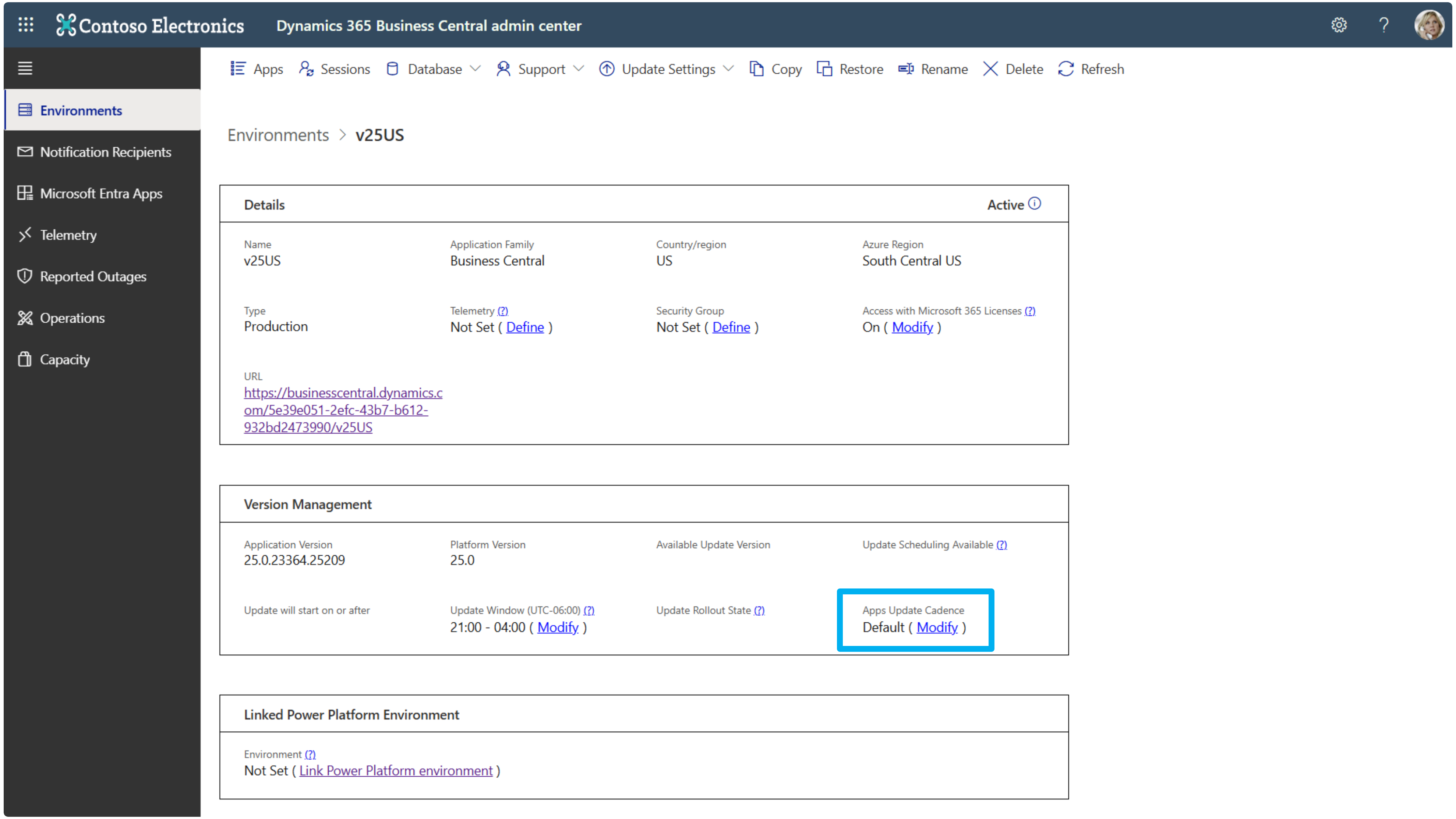
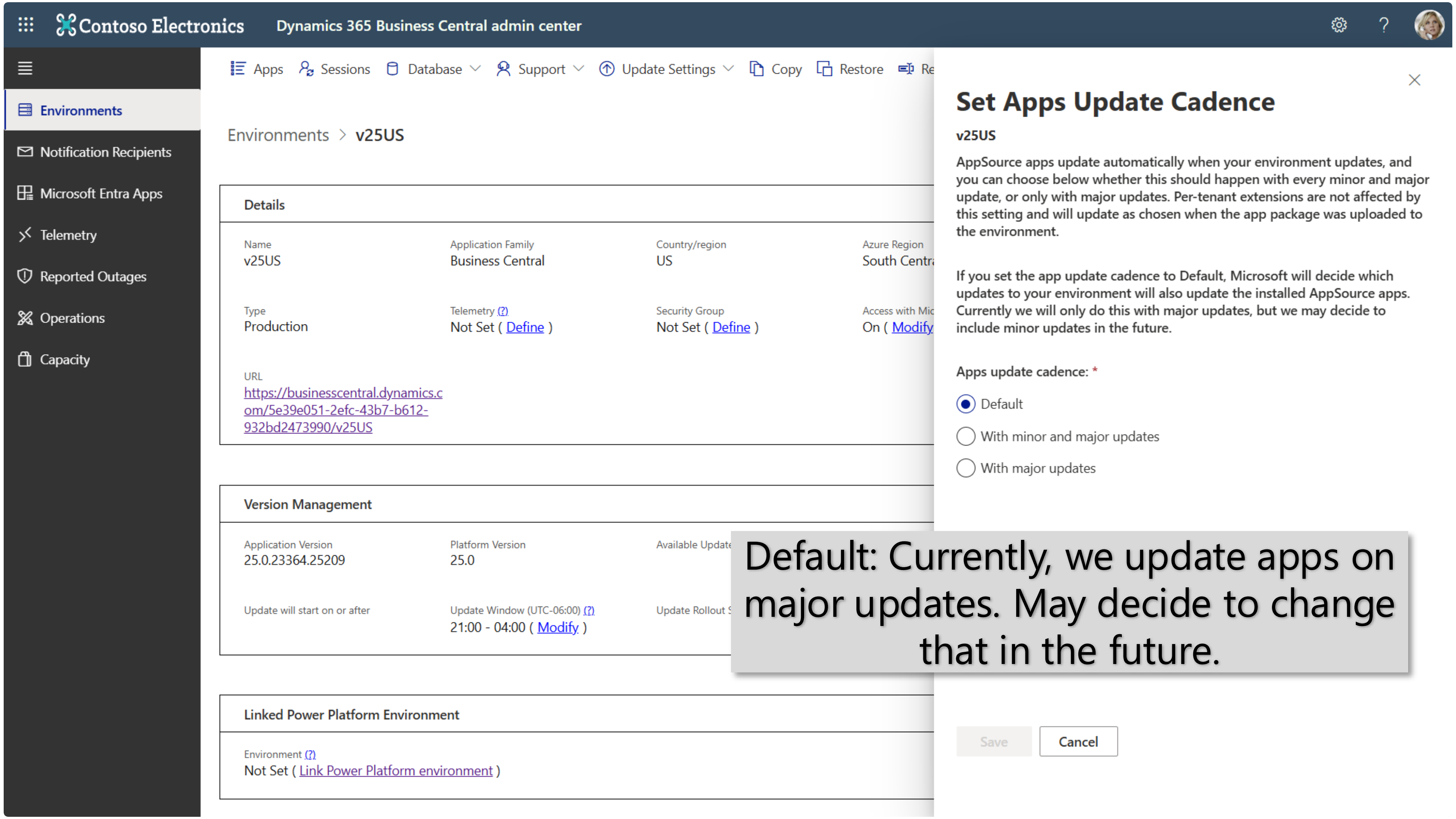


Tip # 41

#41: When to update apps after a Business Central update



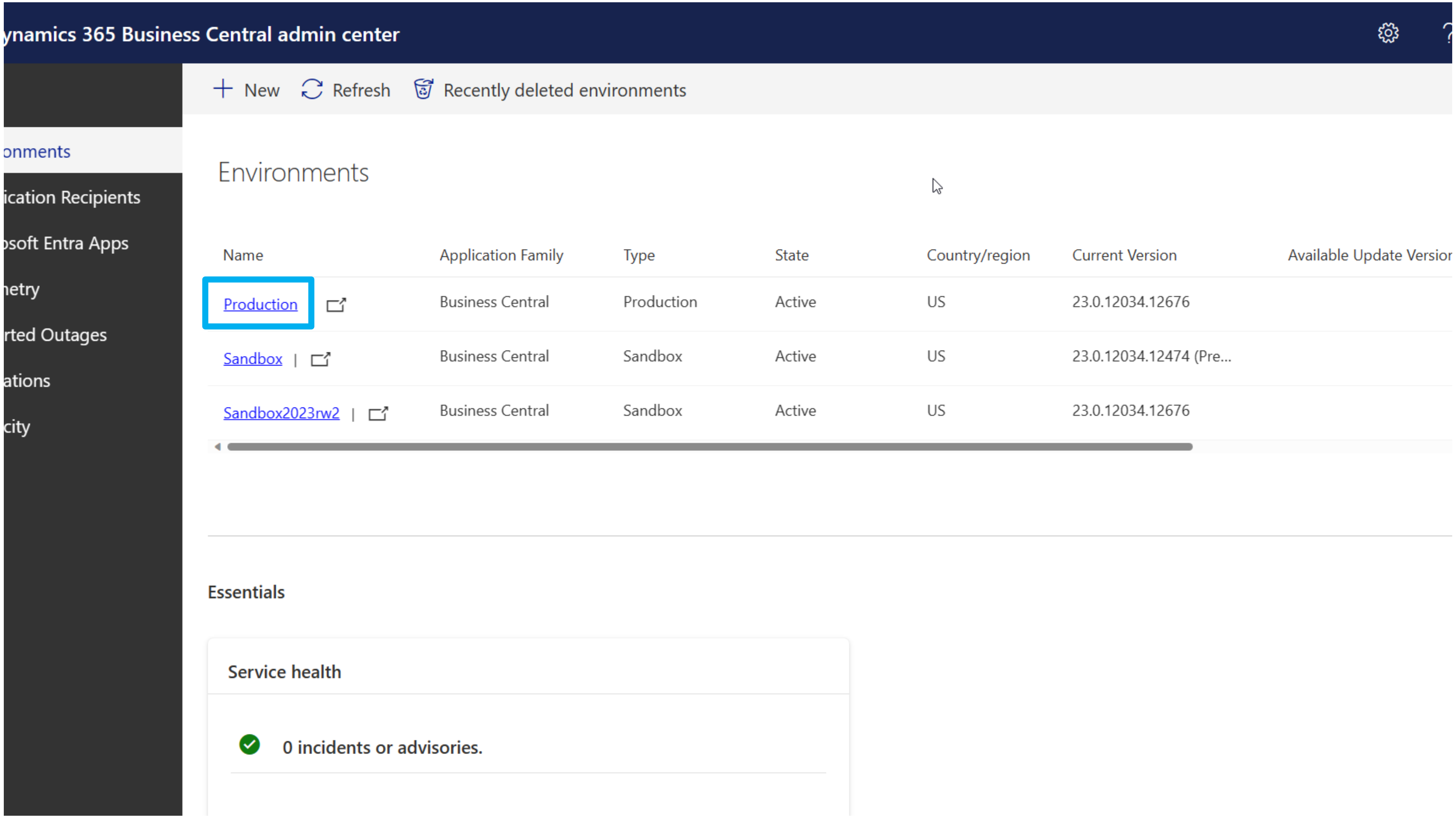
#41: When to update apps after a Business Central update



Default: Currently, we update apps on major updates. May decide to change that in the future.

Tip # 42

#42: Easily get a fresh sandbox based off your production environment



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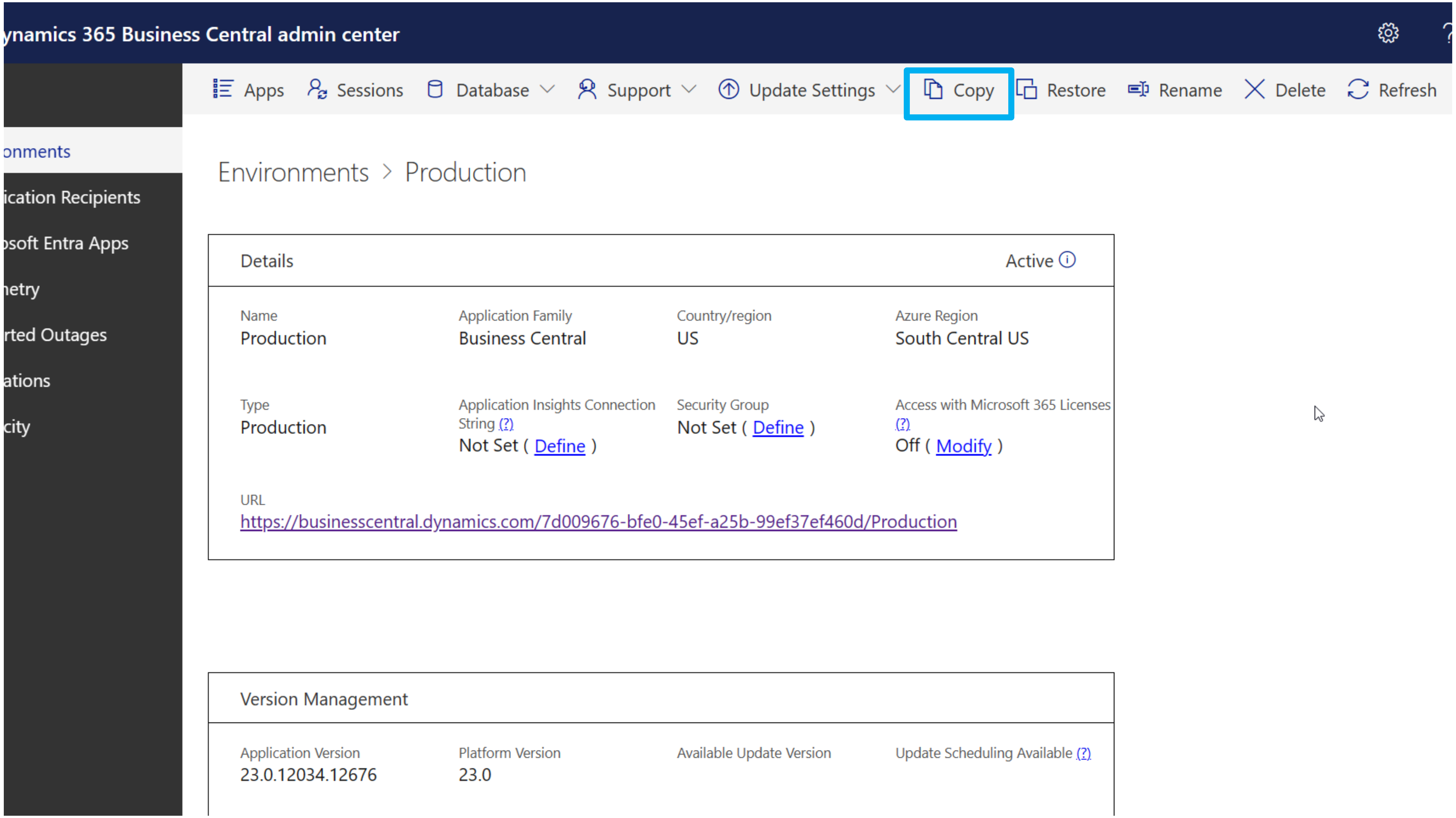

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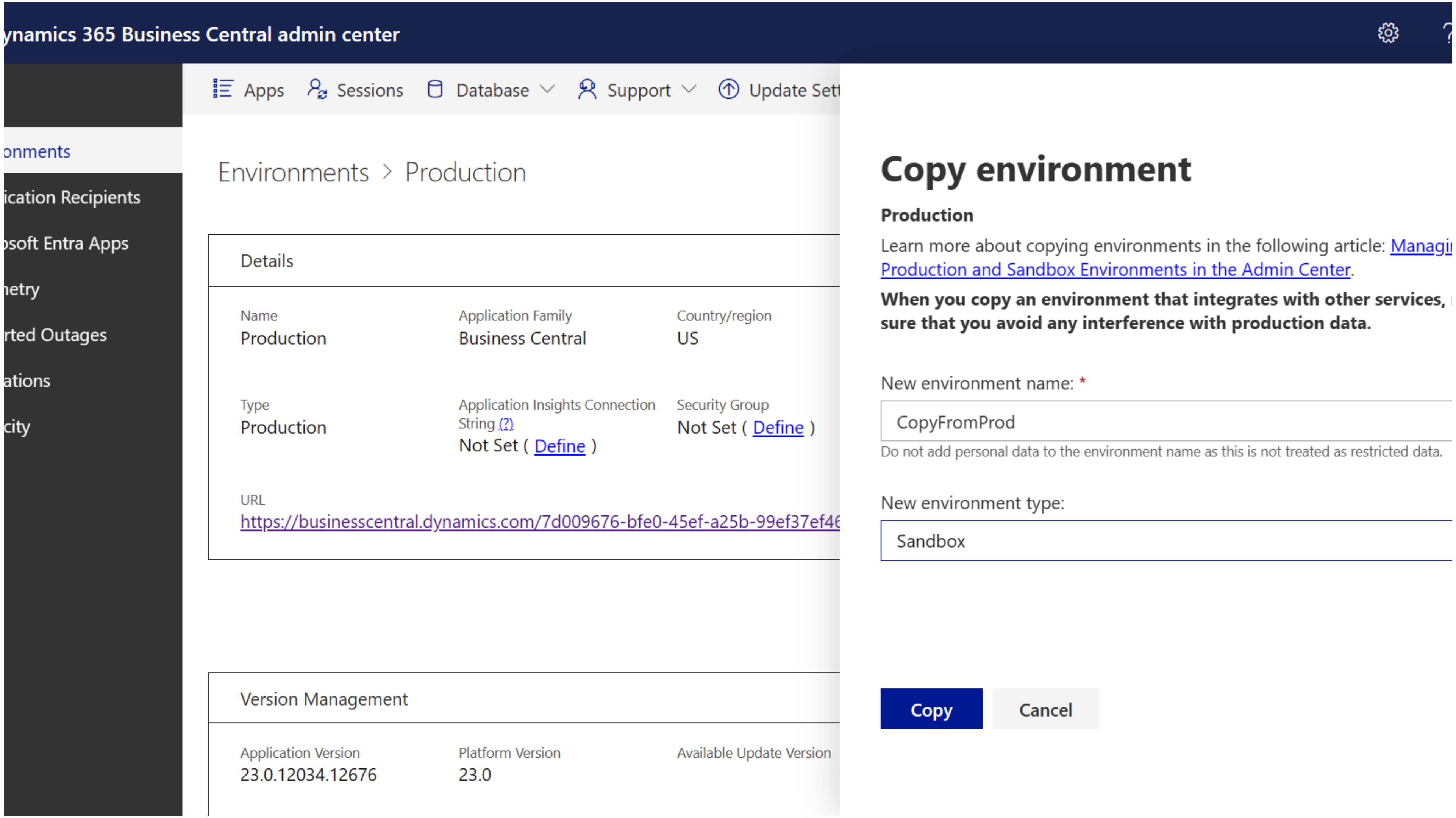

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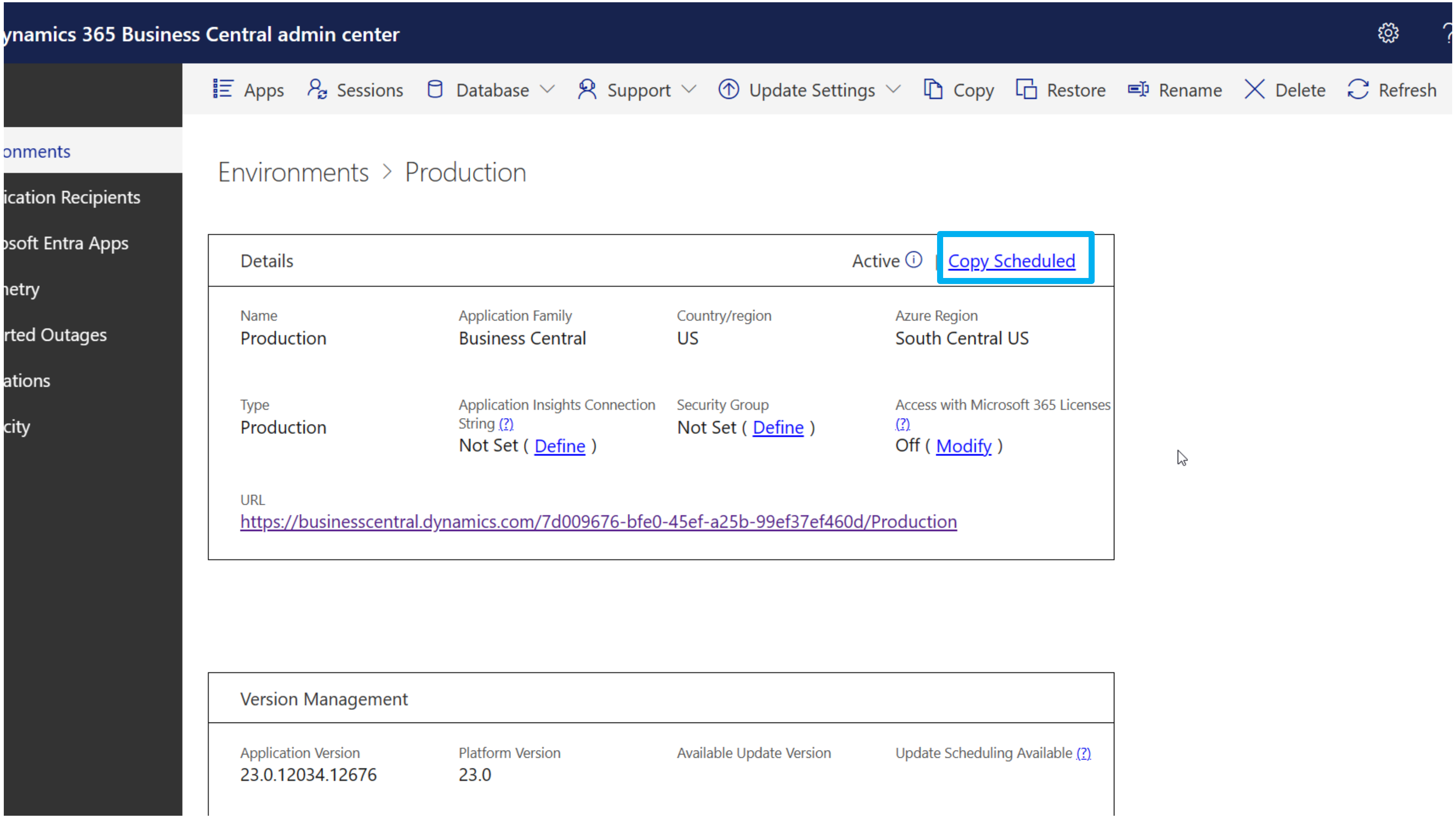

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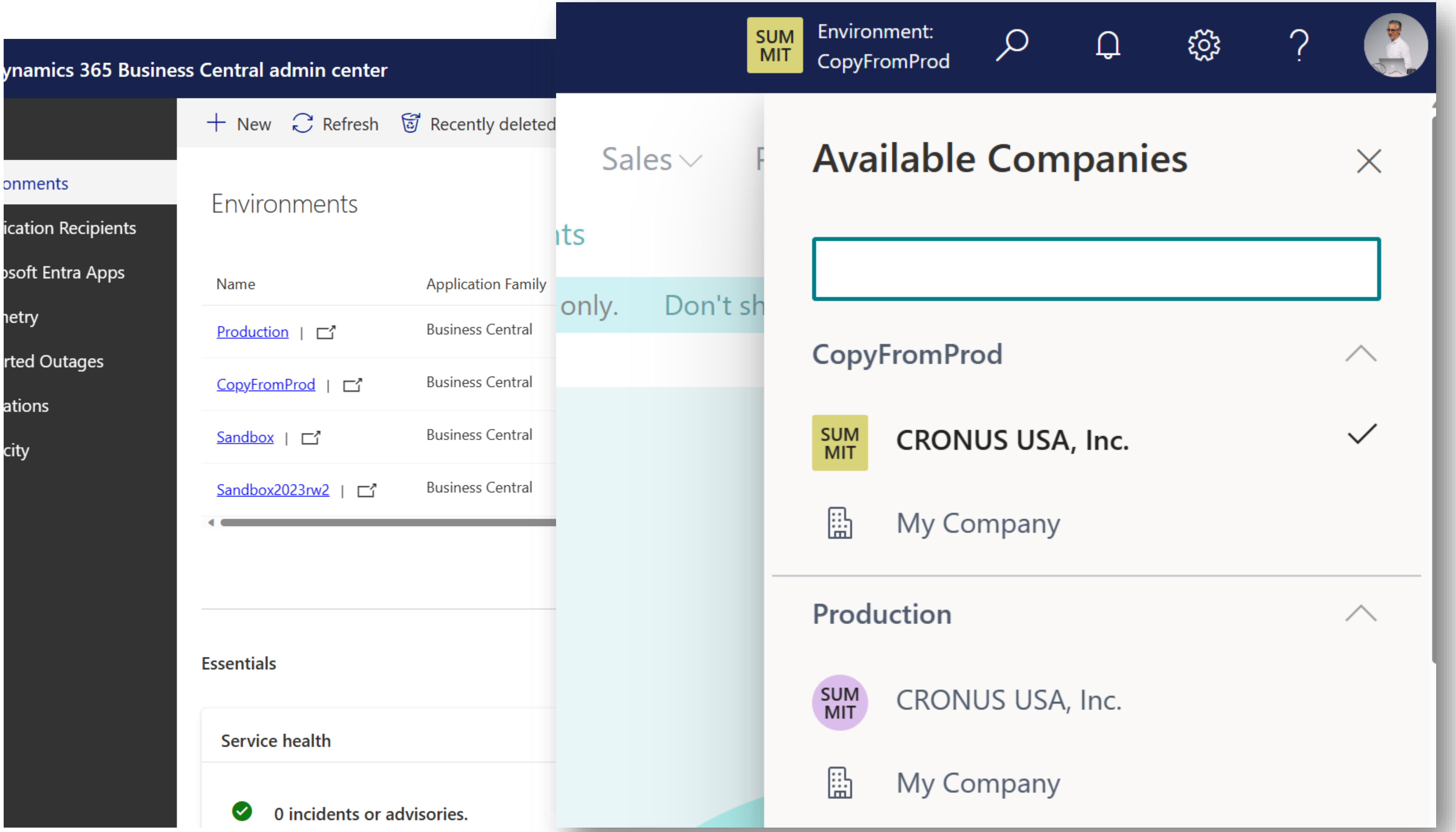
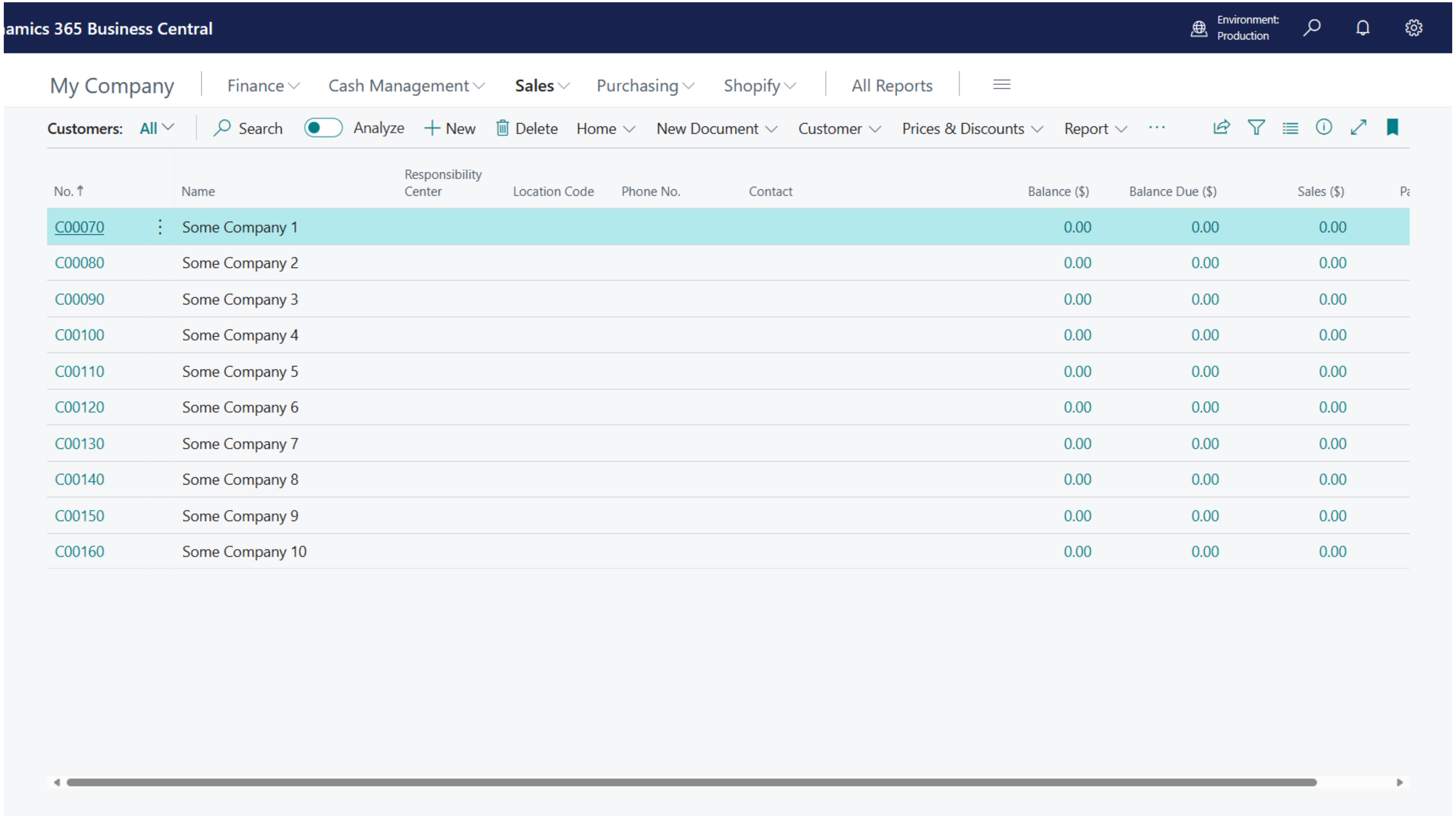
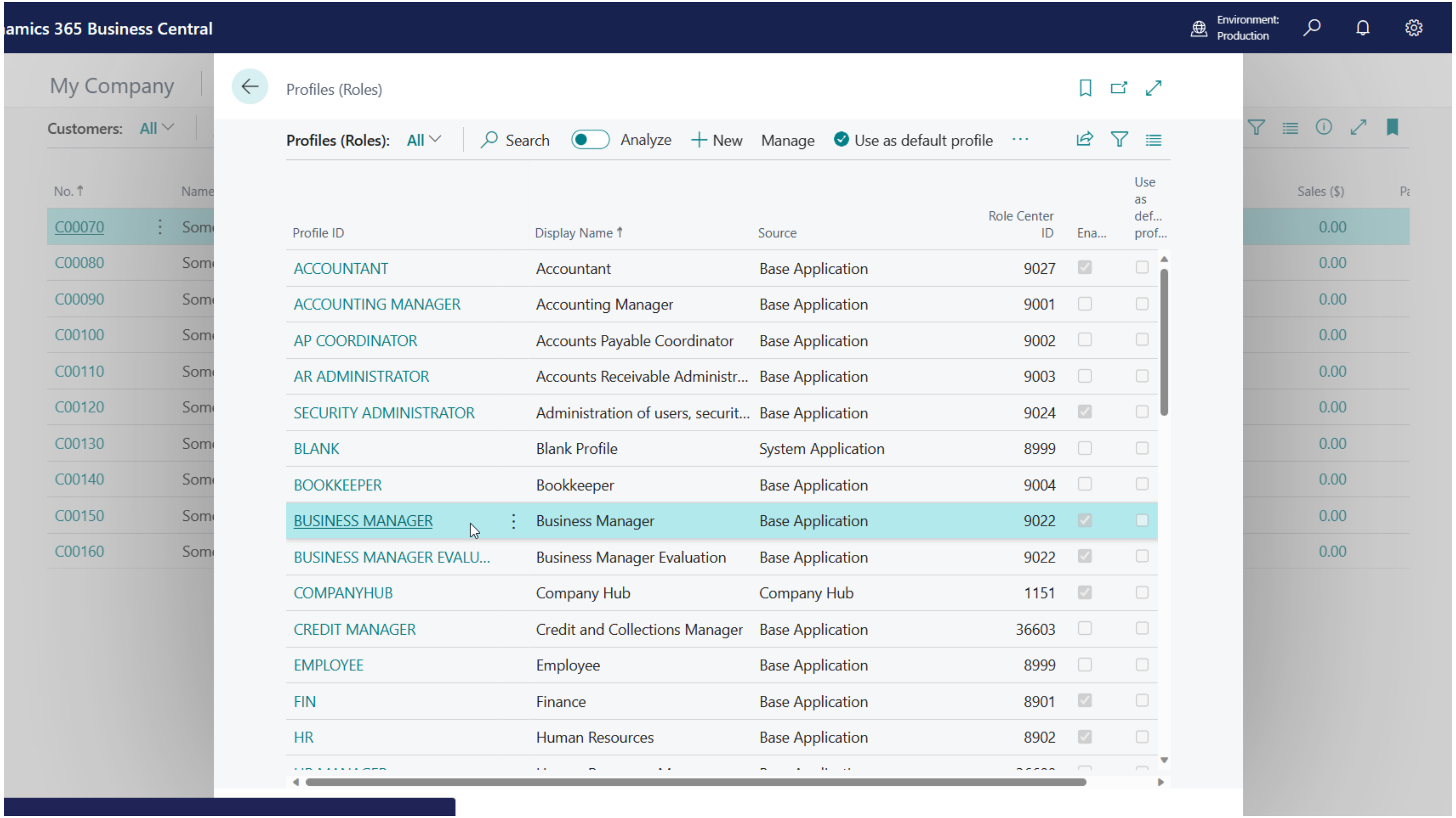


Tip # 43

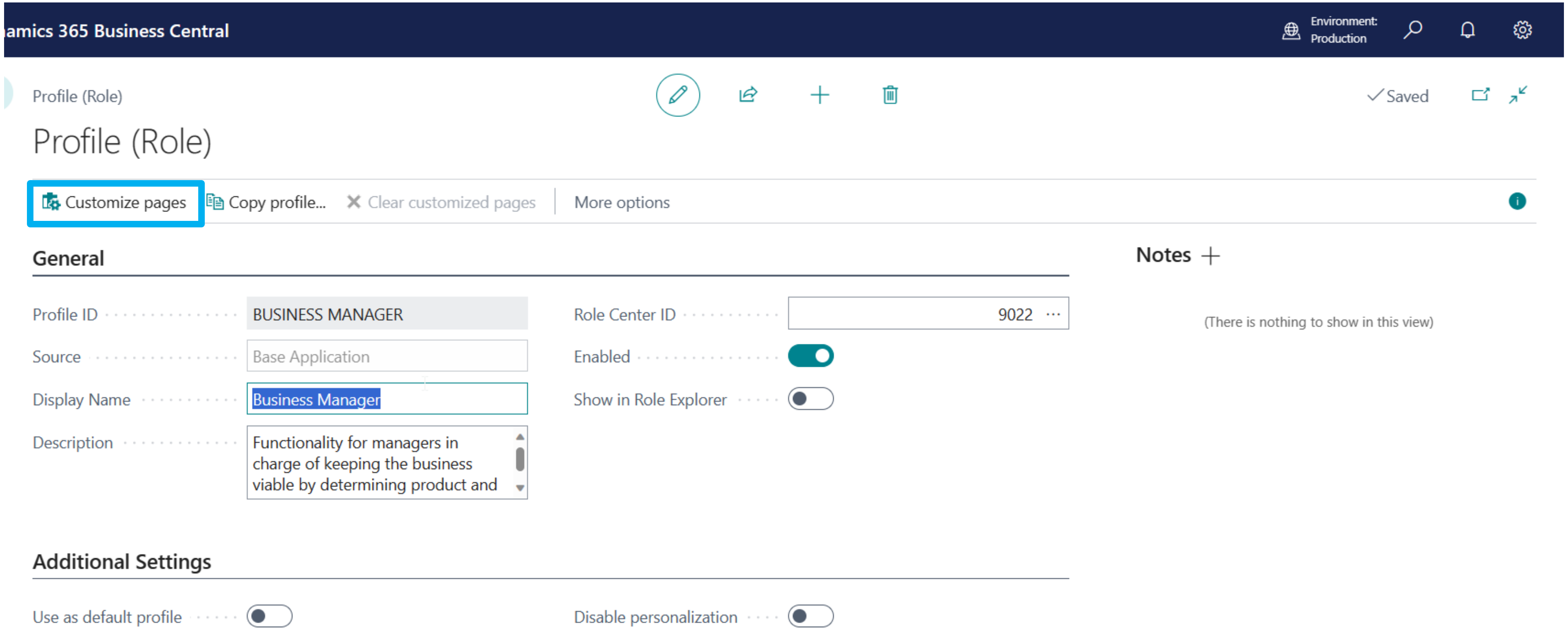
#43: Add any (table) field to the page



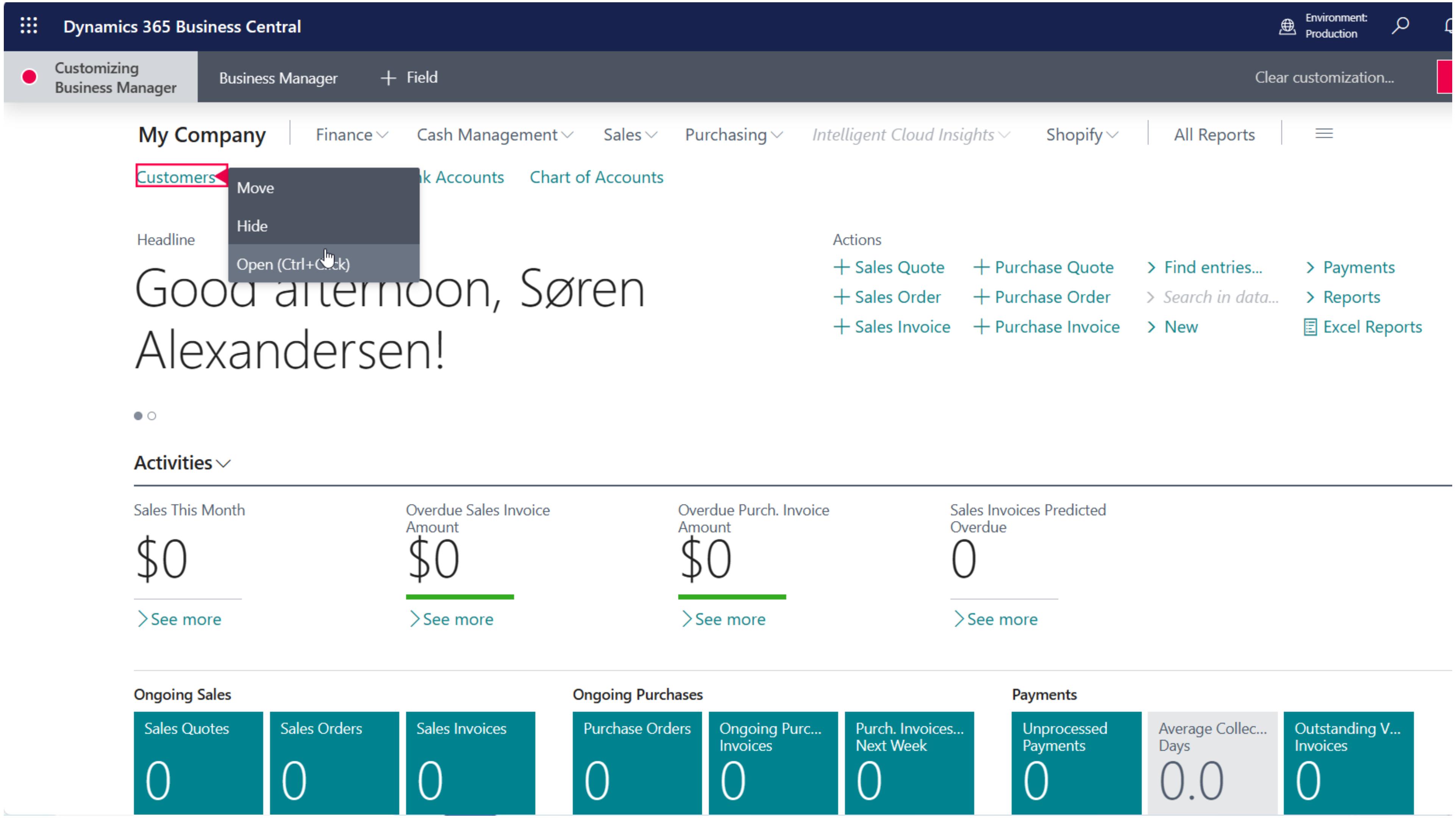
#43: Add any (table) field to the page



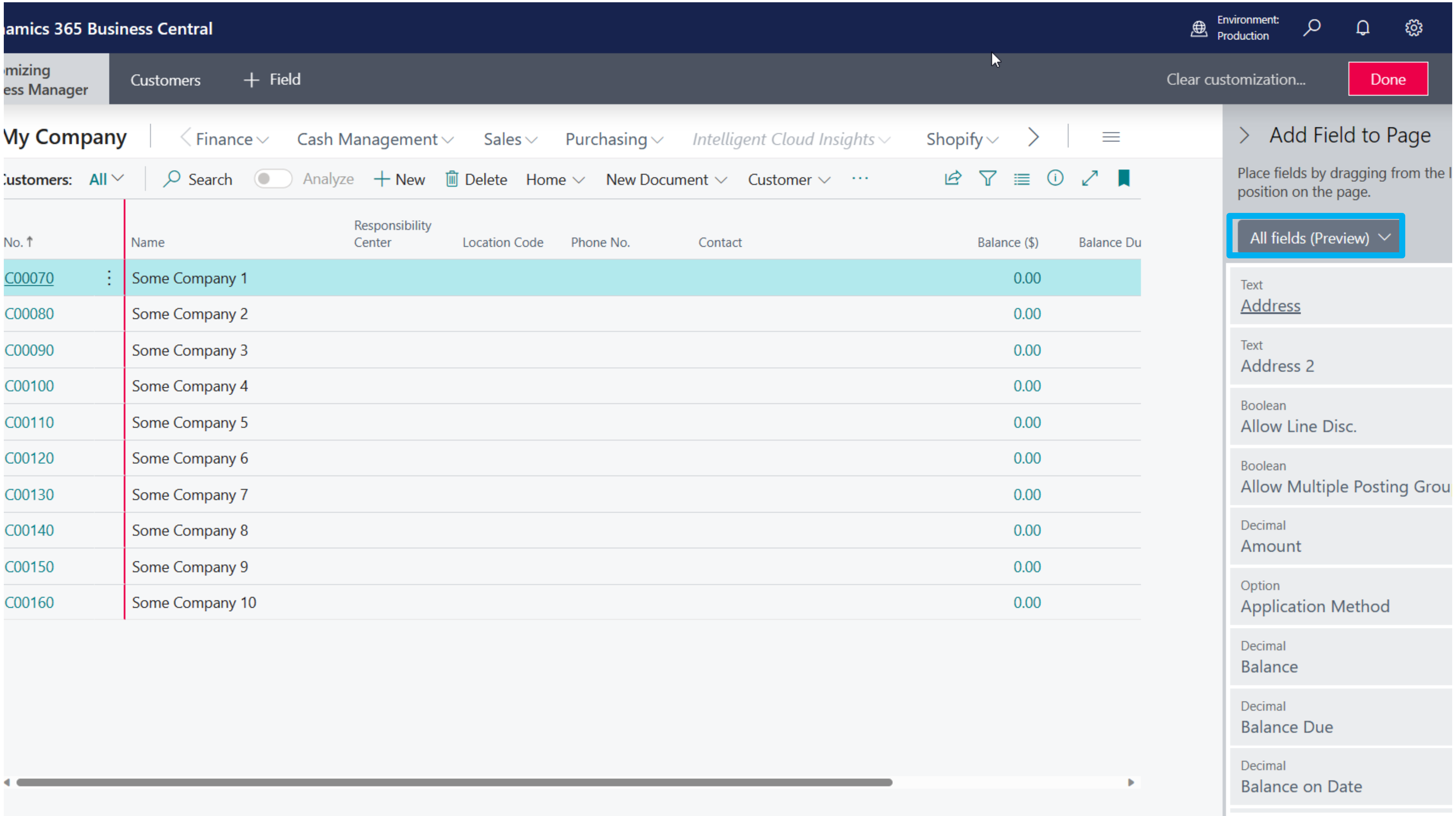
#43: Add any (table) field to the page



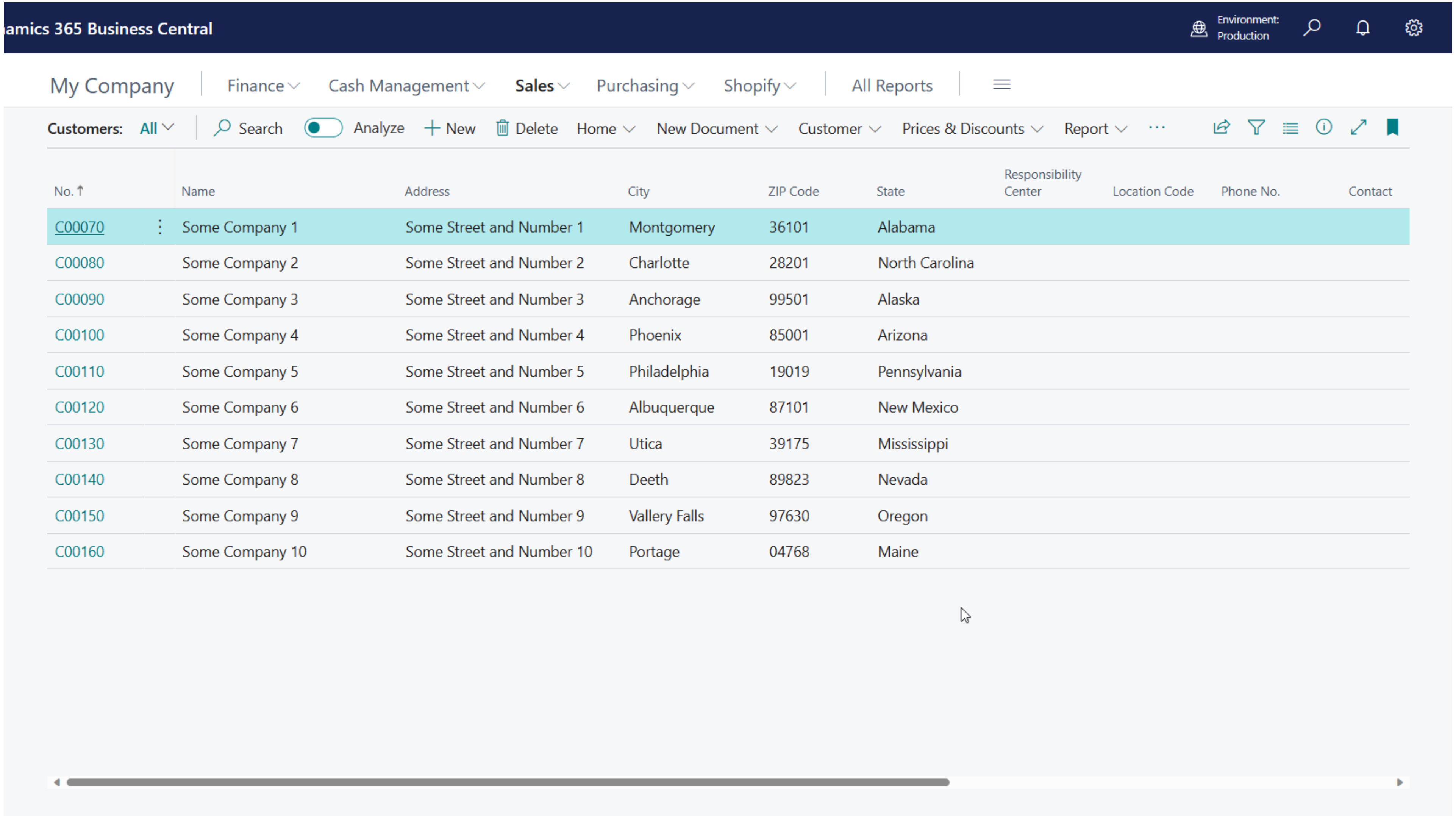
#43: Add any (table) field to the page



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



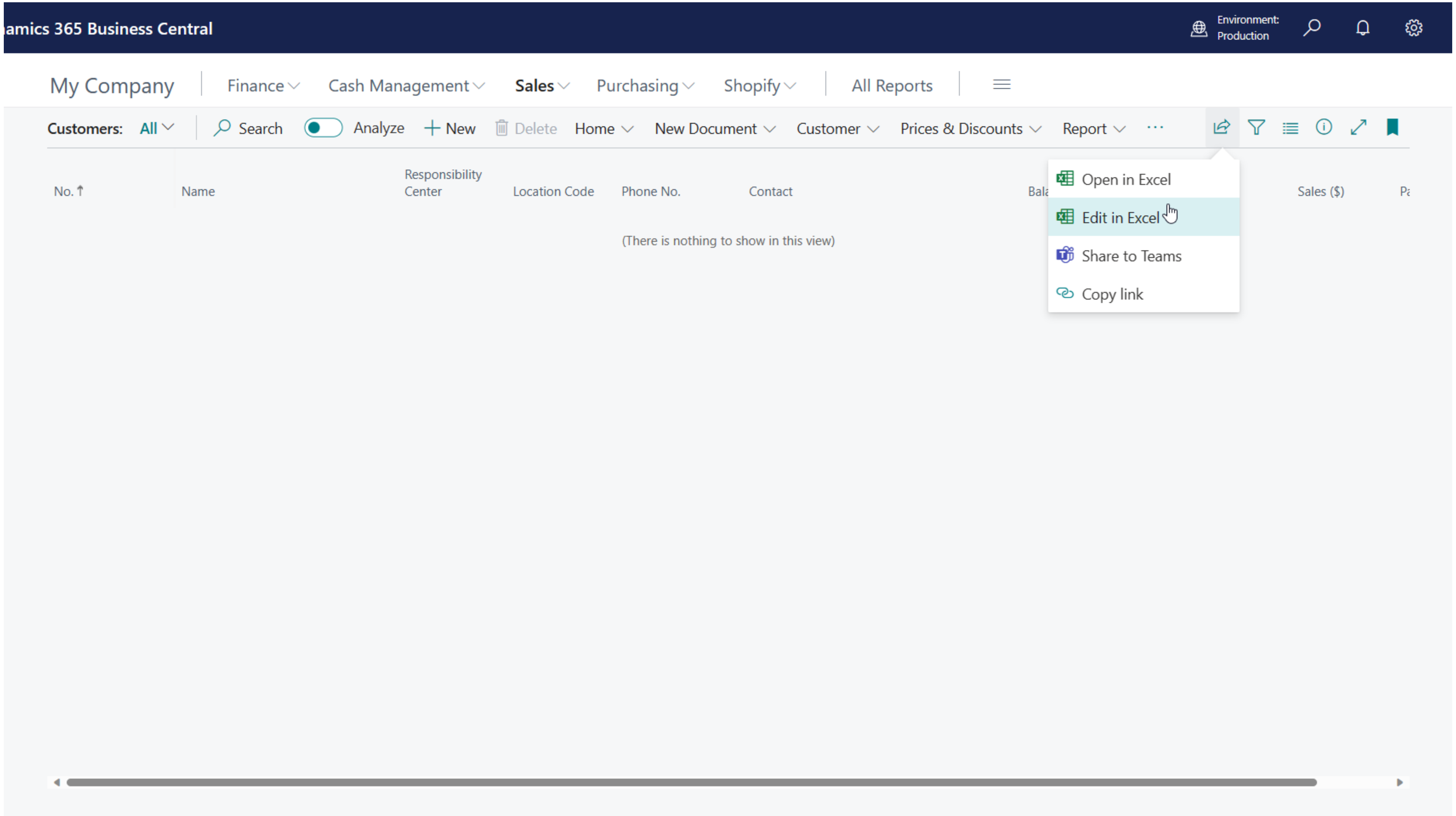
#43: Add any (table) field to the page



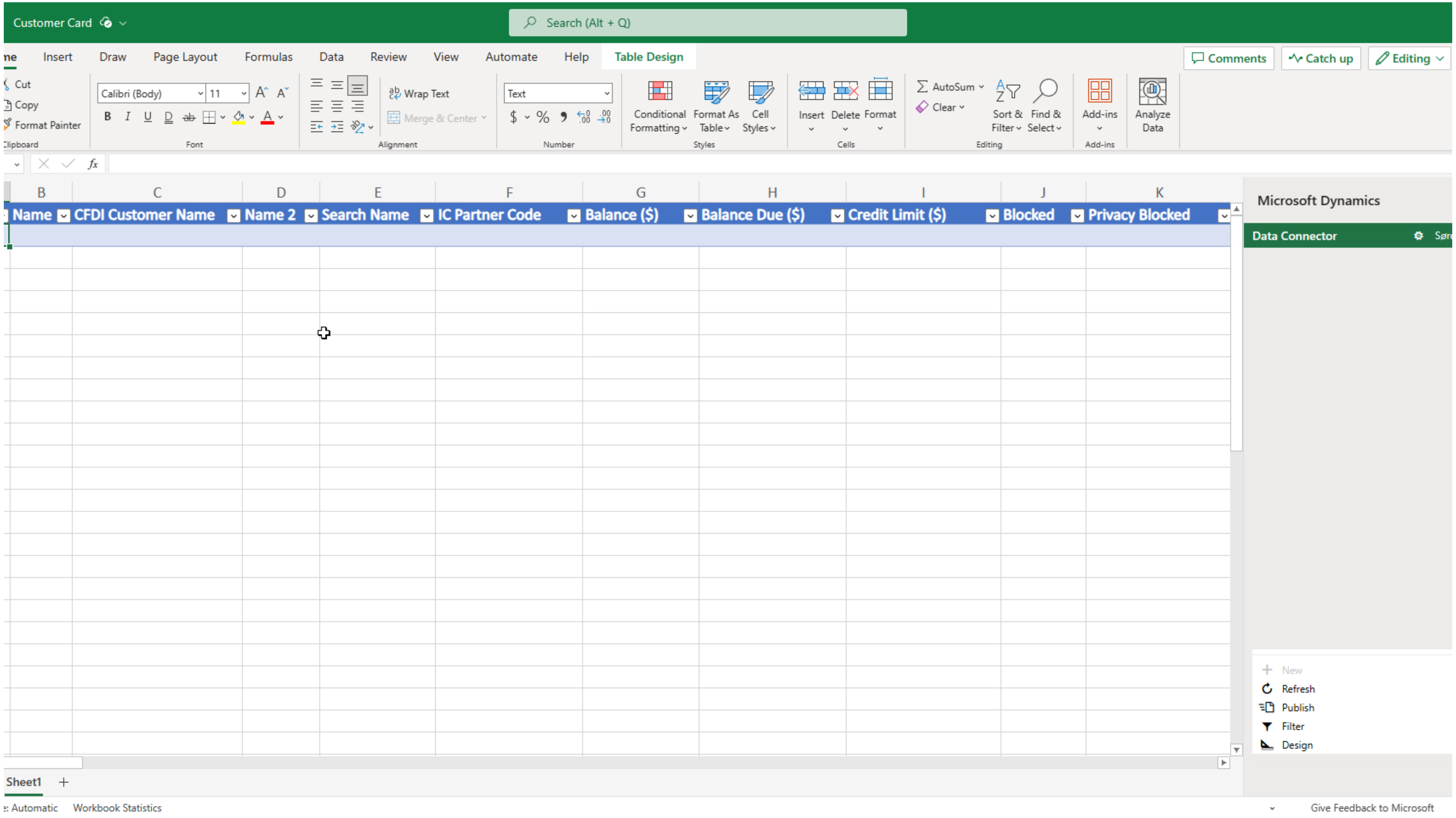
No. ↑	Name	Address	City	ZIP Code	State	Responsibility Center	Location Code	Phone No.	Contact
C00070	Some Company 1	Some Street and Number 1	Montgomery	36101	Alabama				
C00080	Some Company 2	Some Street and Number 2	Charlotte	28201	North Carolina				
C00090	Some Company 3	Some Street and Number 3	Anchorage	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	Valley Falls	97630	Oregon				
C00160	Some Company 10	Some Street and Number 10	Portage	04768	Maine				

Tip # 44

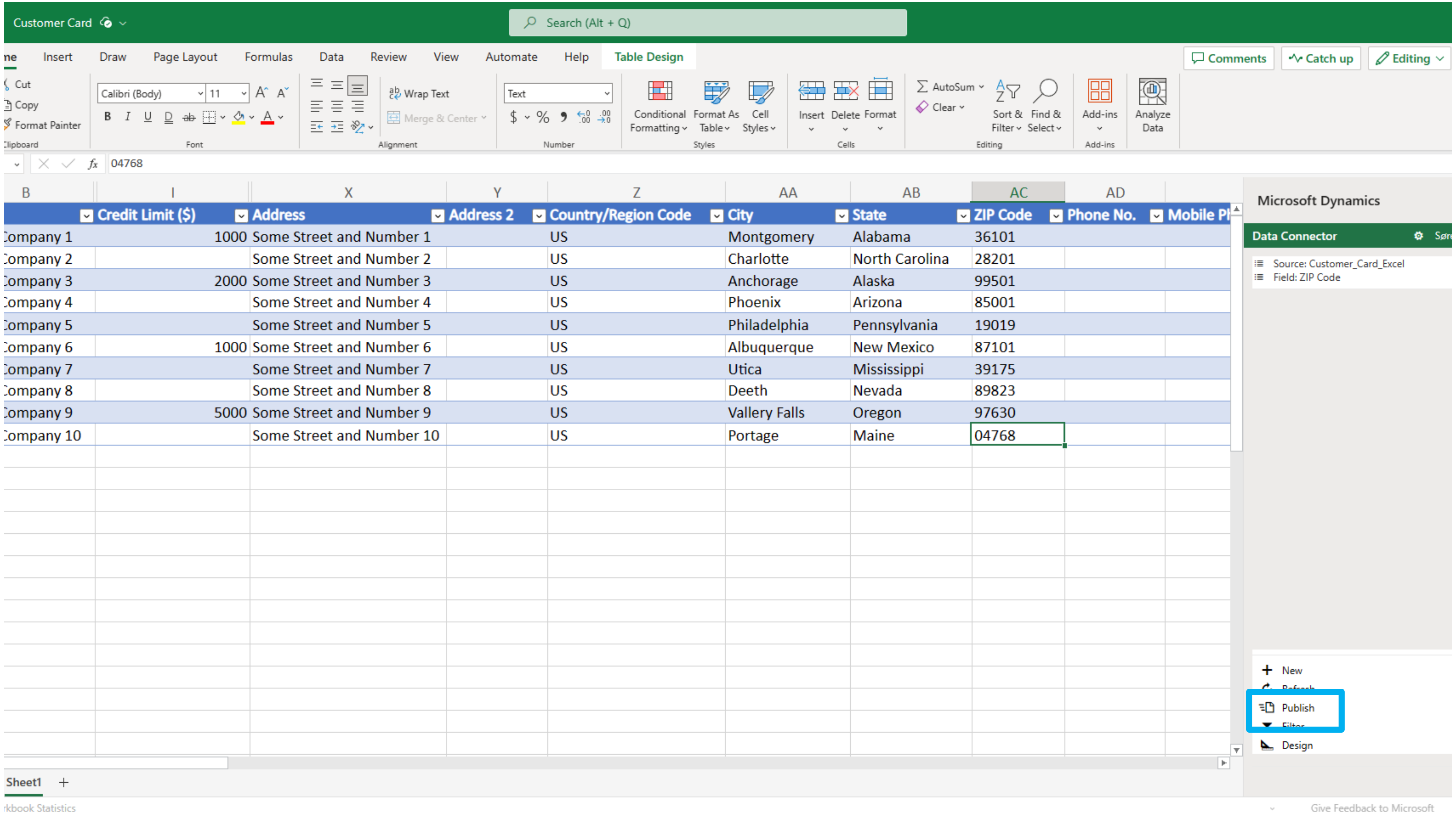
#44: Easily import master data



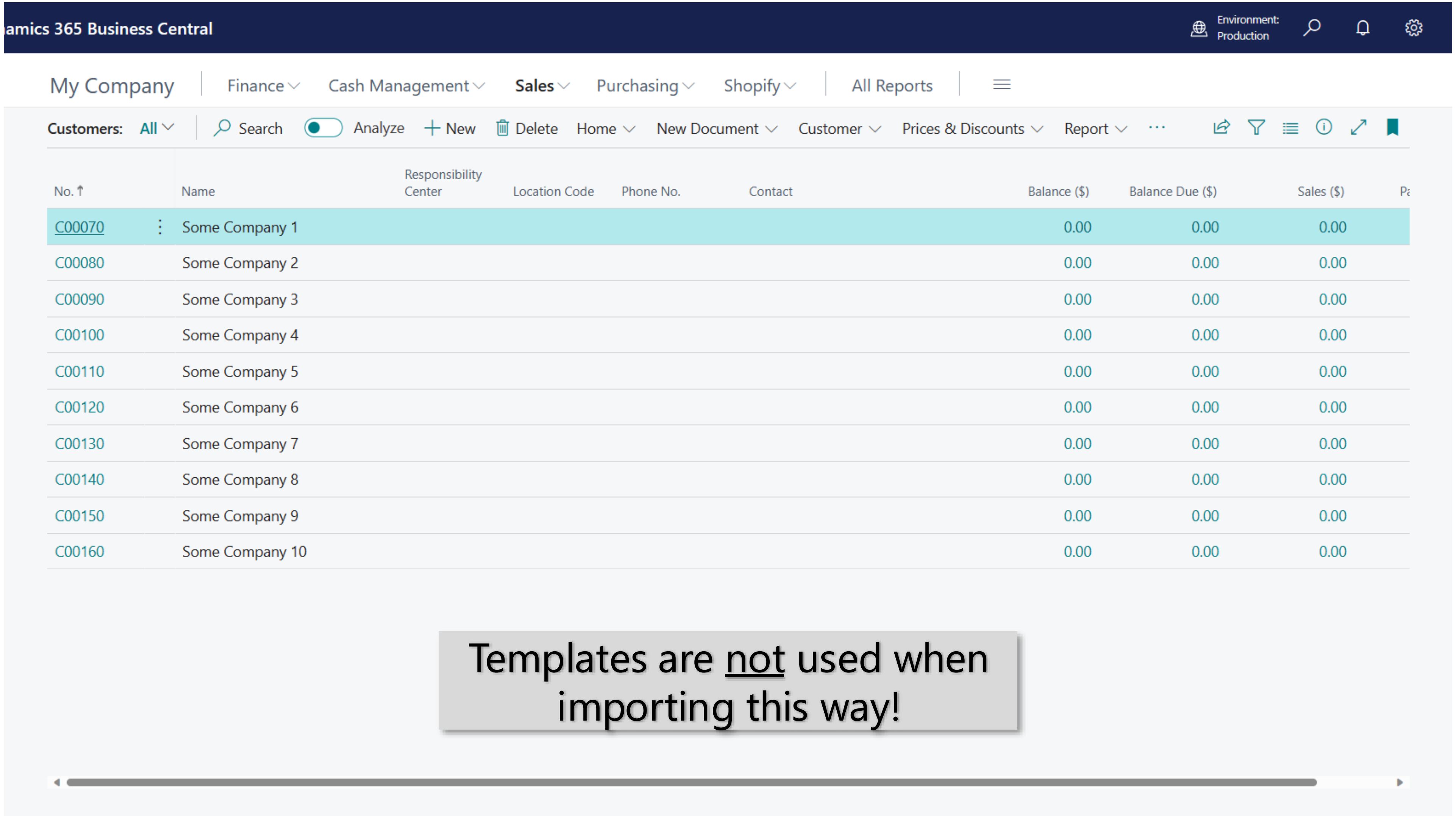
#44: Easily import master data



#44: Easily import master data



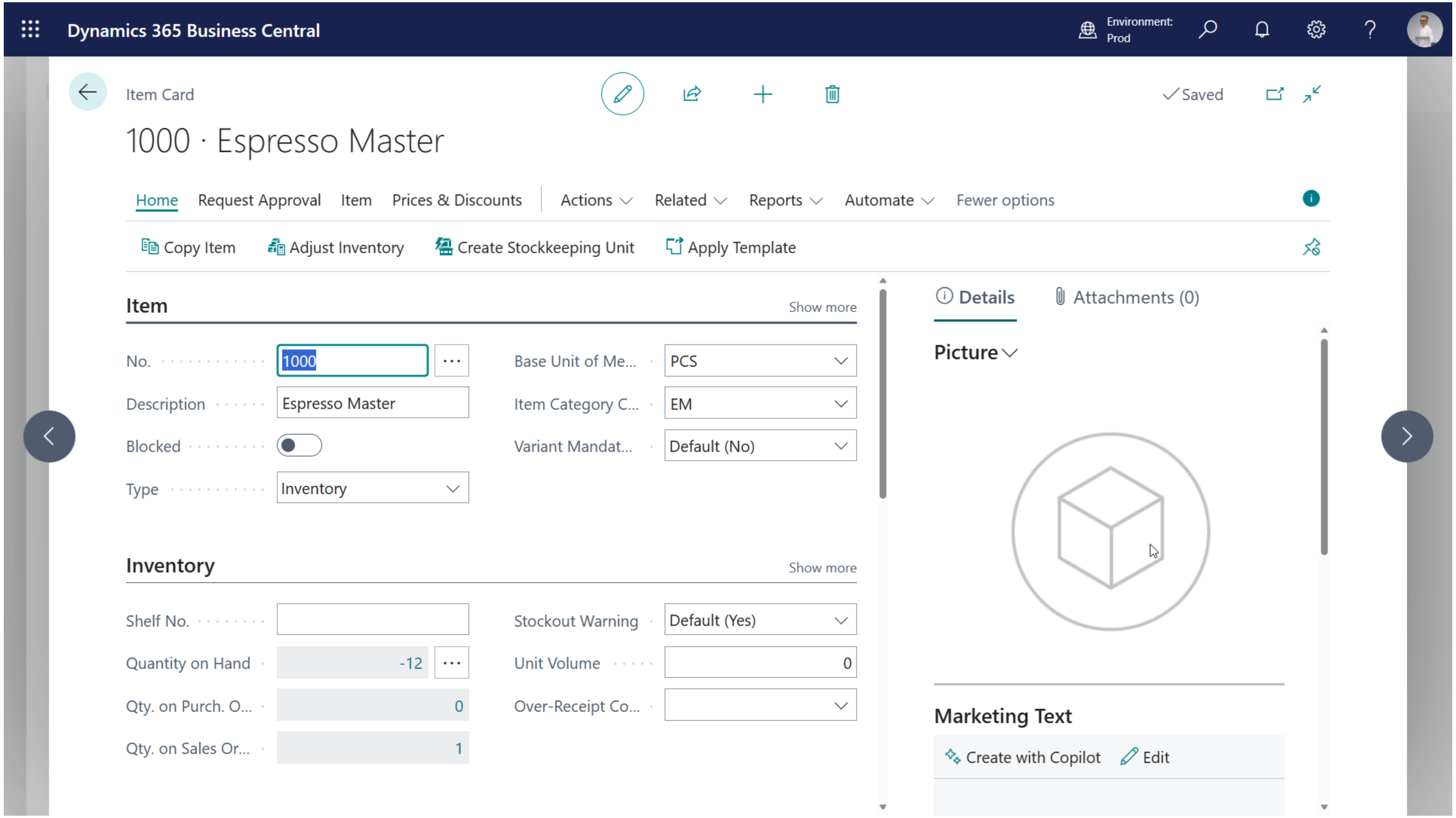
#44: Easily import master data



Templates are not used when importing this way!

Tip # 45

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



Thank you!