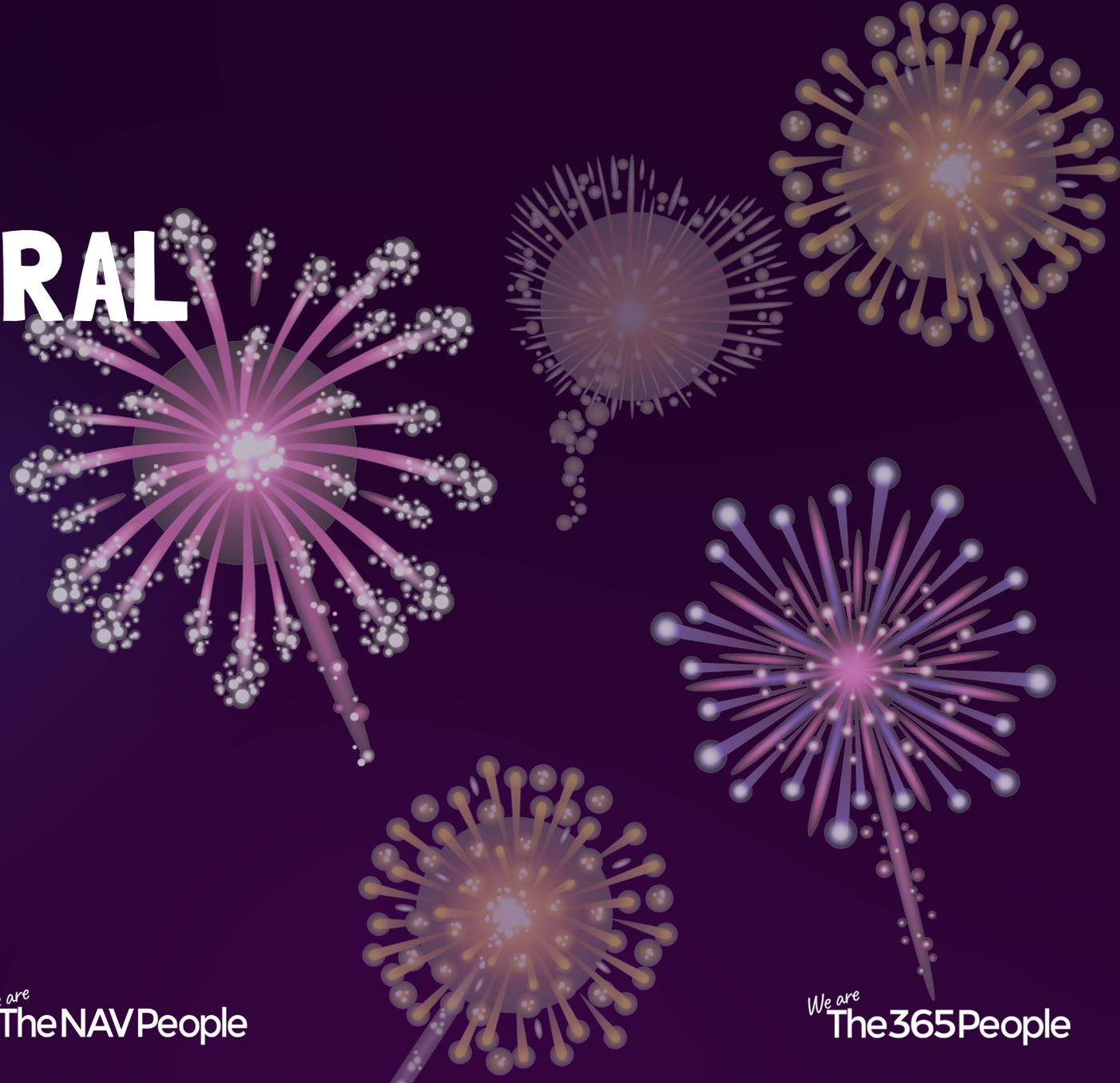


DYNAMICS 365 BUSINESS CENTRAL FOR THE UNFAMILIAR

Andre Verster



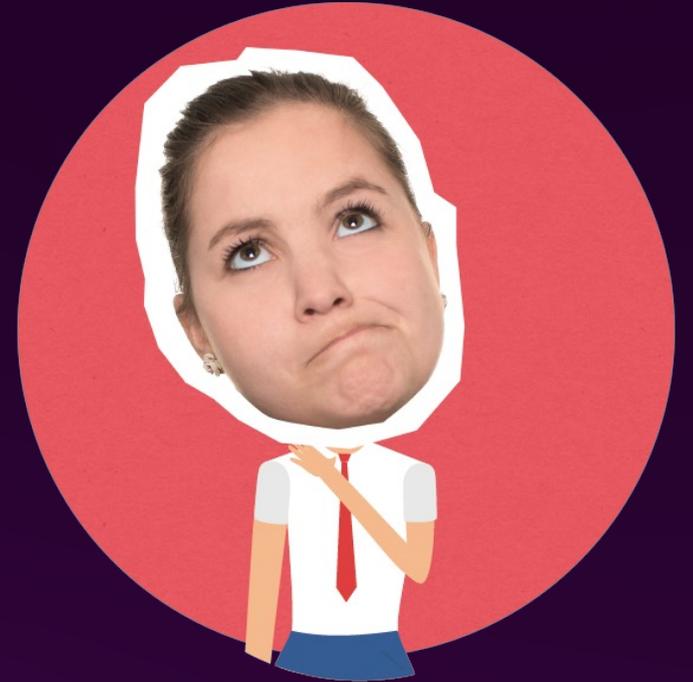
We are
The Power People

We are
The NAV People

We are
The 365 People

ERP? WHAT IS IT?

Let's give a little context to this acronym



E - ENTERPRISE
R - RESOURCE
P - PLANNING







Financial Management

Account receivables/
payables

Bank
reconciliation

Fixed asset
management

Month/Year
end closing



Sales & Service Management

Quote
generation

Contact
management

Sales
invoicing

Payment
processing



Project Management

Capacity
planning

Budgets and
estimates

Job and
process costing

Resource
management



Supply Chain Management

Inventory and
Purchasing control

Shipment and
distribution

Returns and
cancellations

Procurement and
vendor management



Operations Management

Forecasting

Production
planning

Manufacturing
capacity

Warehouse
management



Reporting & Analytics

Customer
insights

Self-serve
reports

Interactive
dashboards

Built-in
intelligence

RETHINKING DYNAMICS NAV AS A MODERN APP

ACTIONS REPORT

- Sales Quote
- Sales Invoice
- Sales Order
- Sales Return Order
- Sales Credit Memo
- Sales Line Discounts
- Credit Management
- Order Status
- Sales Journal
- Sales Price Worksheet
- Sales Prices
- List Price Sheet
- Navigate
- Inventory - Sales Back Orders
- Customer - Order Summary

New Document General Price History Reports

- Role Center
- Sales Order
- Sales Quote
- Blanket Sales Order
- Sales Invoice
- Sales Return Order
- Sales Credit Memo
- Items
- Customer
- Item Journal
- Sales Journal
- Cash Receipt

Inc.

Microsoft Dynamics NAV ADMIN

CRONUS USA,

My Customers

Customer No.

(There is nothing to show in this view)

Trailing Sales Orders

All Orders|Month|No. of Orders|. (Updated at 9:10:34 ...)

14

Delayed

Microsoft Dynamics NAV ADMIN

CRONUS USA, Inc.

For Release

- Sales Quotes - Open: 0
- Sales Orders - Open: 20

Sales Orders Released Not Shipped

- Ready To Ship: 6
- Partially Shipped: 0
- Delayed: 14

7.5

Average Days Delayed

Returns

- Sales Return Orders - Open: 0
- Sales Credit Memos - Open: 1

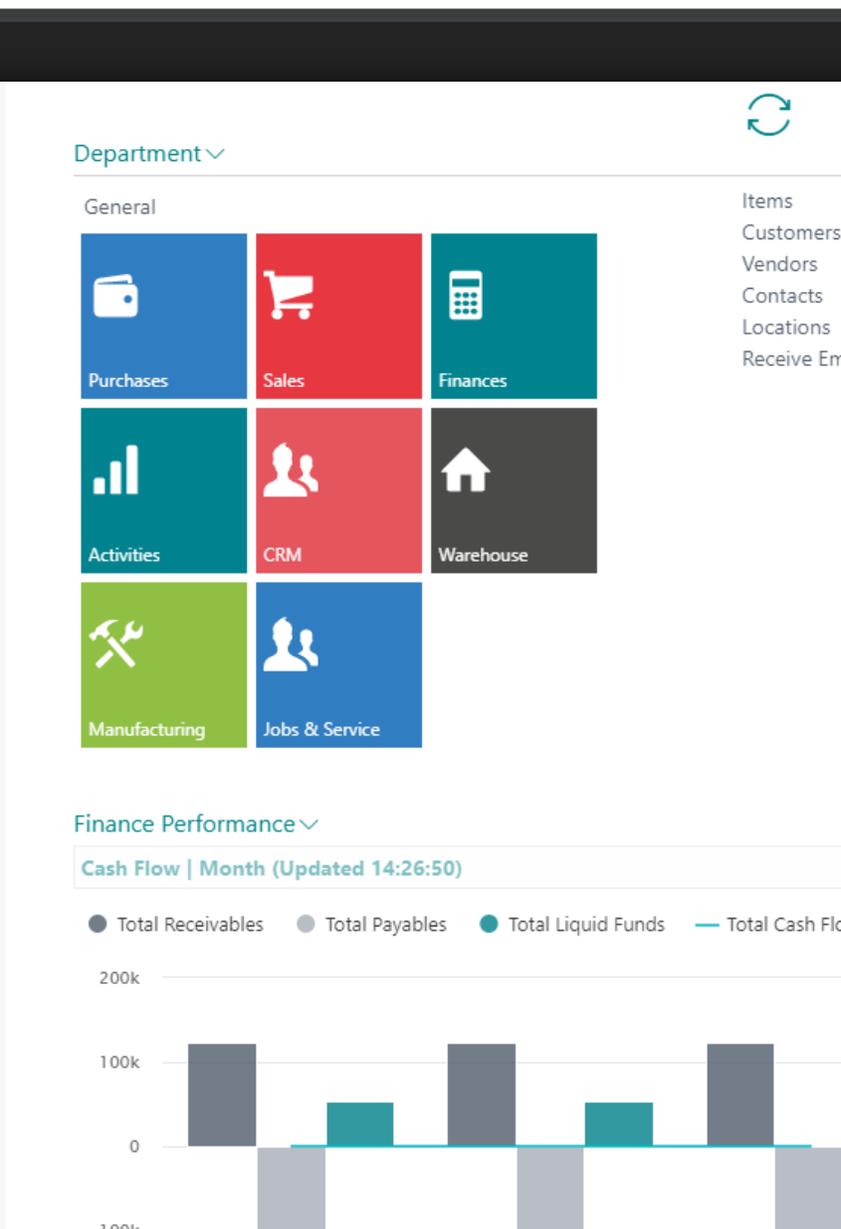
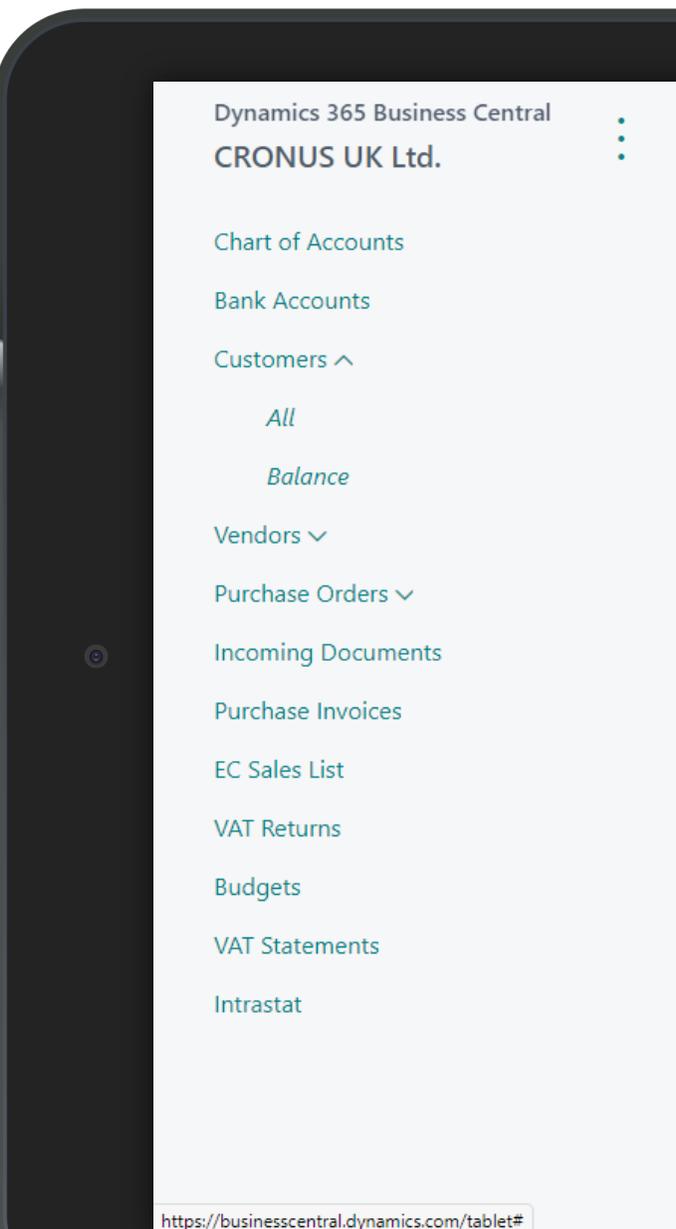
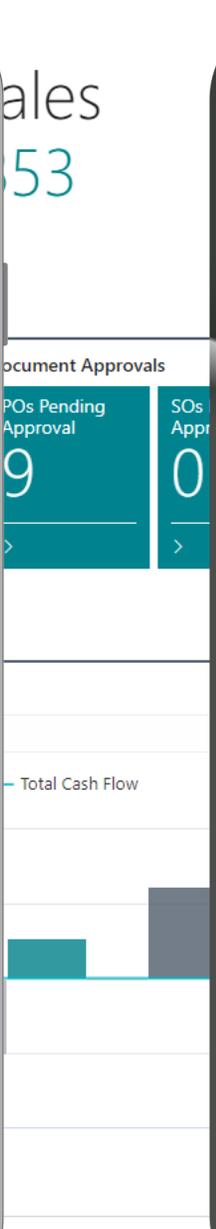
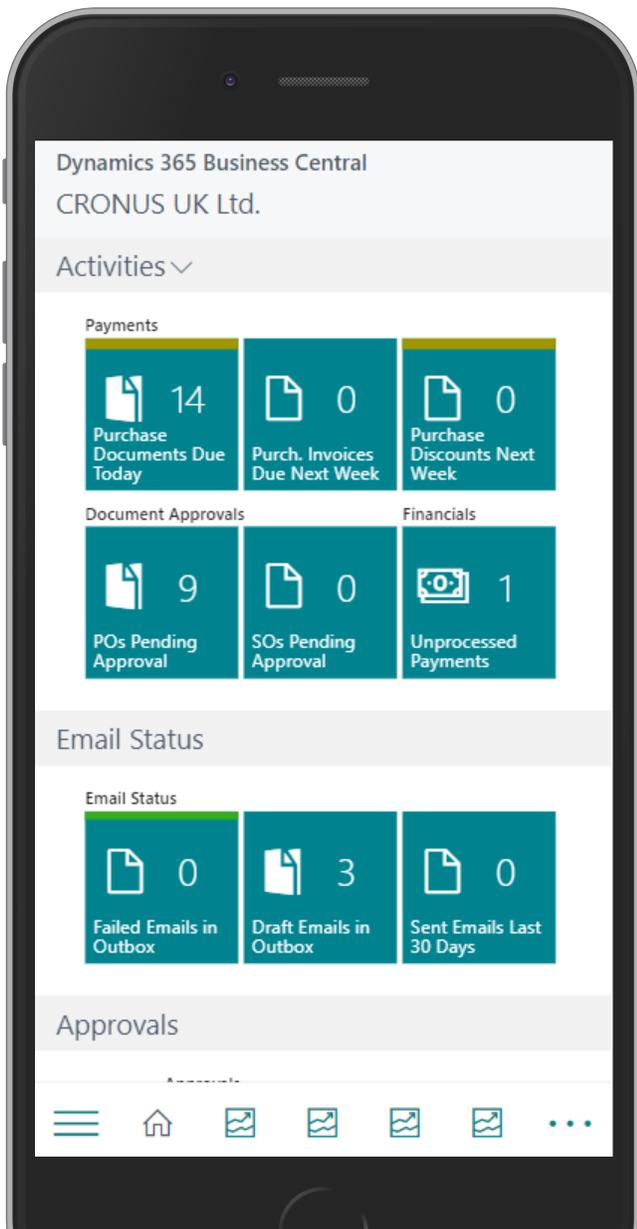
Microsoft Dynamics NAV ADMIN

My Customers

Customer No.	Name	Phone No.
(There is nothing to show in this view)		

Trailing Sales Orders

All Orders|Month|No. of Orders|. (Updated at 9:09:03 PM.)



Dynamics 365 Business Central
CRONUS UK Ltd.

Activities

Payments



Document Approvals



Financials

Email Status

Email Status



Approvals

Dynamics 365 Business Central
CRONUS UK Ltd.

Chart of Accounts

Bank Accounts

Customers

All

Balance

Vendors

Purchase Orders

Incoming Documents

Purchase Invoices

EC Sales List

VAT Returns

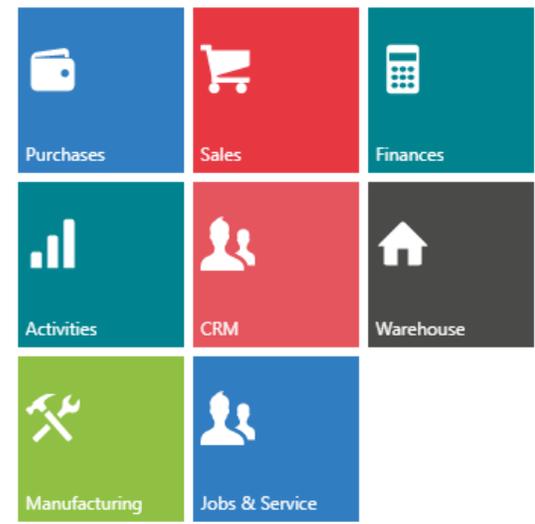
Budgets

VAT Statements

Intrastat

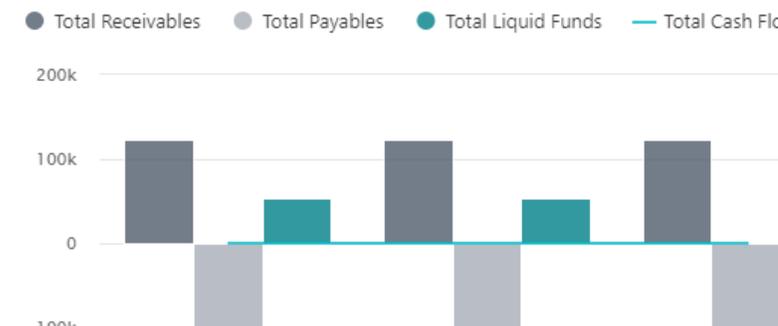
Department

General

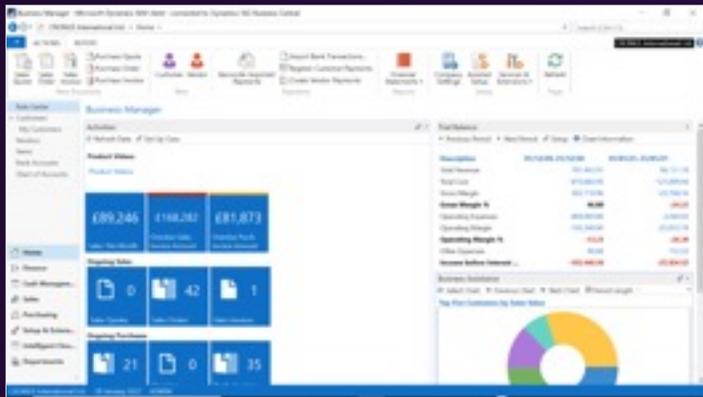


Finance Performance

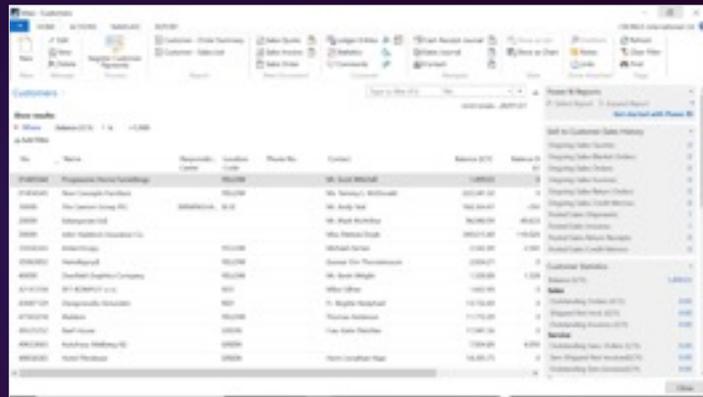
Cash Flow | Month (Updated 14:26:50)



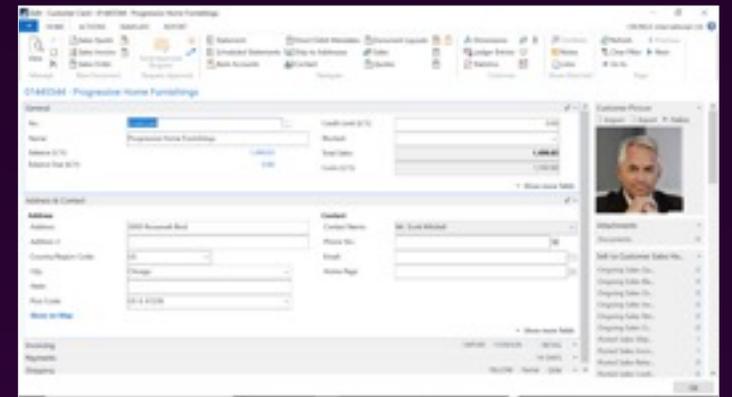
COMPARING POPULAR PAGE TYPES



Role Center



Lists



Cards & Documents

ACTIONS **REPORT**

Sales Quote Sales Order Sales Invoice Purchase Quote Purchase Order Purchase Invoice
Customer Vendor
Reconcile Imported Payments
Import Bank Transactions... Register Customer Payments Create Vendor Payments
Financial Statements
Company Settings Assisted Setup Services & Extensions
Refresh

New Document New Payments Reports Setup Page

- Role Center
- Customers
 - My Customers
- Vendors
- Items
- Bank Accounts
- Chart of Accounts
- Home
- Finance
- Cash Management
- Sales
- Purchasing
- Setup & Extensions
- Intelligent Cloud
- Departments

Business Manager

Activities

Refresh Data Set Up Cues

Product Videos

Product Videos

£89,246 Sales This Month	£168,282 Overdue Sales Invoice Amount	£81,873 Overdue Purch. Invoice Amount
-----------------------------	--	--

Ongoing Sales

0 Sales Quotes	42 Sales Orders	1 Sales Invoices
-------------------	--------------------	---------------------

Ongoing Purchases

21 Purchase Orders	0 Purchase Invoices	35 Purchase Receipts
-----------------------	------------------------	-------------------------

Trial Balance

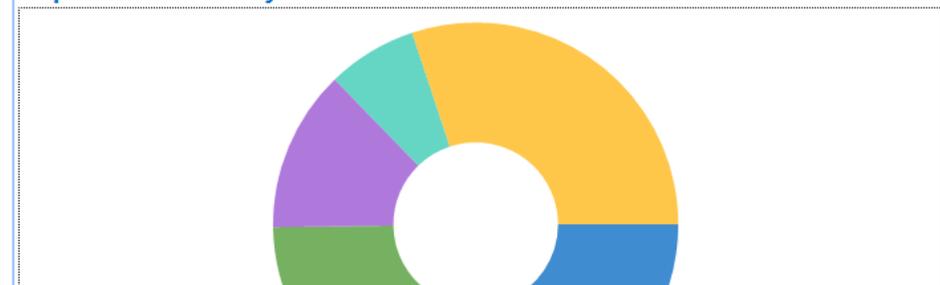
Previous Period Next Period Setup Chart Information

Description	01/12/20..31/12/20	01/01/21..31/01/21
Total Revenue	781,403.91	98,131.78
Total Cost	-415,683.95	-121,899.94
Gross Margin	365,719.96	-23,768.16
Gross Margin %	46.80	-24.22
Operating Expenses	469,069.86	2,044.03
Operating Margin	-103,349.90	-25,812.19
Operating Margin %	-13.23	-26.30
Other Expenses	90.66	112.33
Income before Interest ...	-103,440.56	-25,924.52

Business Assistance

Select Chart Previous Chart Next Chart Period Length

Top Five Customers by Sales Value



Insight from last week

The largest posted sales invoice was for £497,773

Actions

- + Sales Credit Memo
- + Purchase Credit Memo
- + Payment Journal Entry
- > Panels Selection
- > Payments
- > Analysis
- > Tasks
- > Create
- > Reports
- > History
- G/L Reports
- Cash Flow
- Customers and Vendors
- VAT Reports
- Intrastat
- Cost Accounting

Activities

Overdue Purchase Documents

19

> See more

Cash Accounts Balance

£552,192

> See more

New Incoming Documents

1

> See more

Payments

Purchase Documents Due Today

19

Purchase Invoices Next Week

0

Purchase Discounts Next Week

0

Document Approvals

POs Pending Approval

39

SOs Pending Approval

0

Financials

Unprocessed Payments

1

Incoming Documents

Approved Incoming Documents

0

OCR Completed

0

Product Videos

Product Videos

Get started

Play Getting Started

Insights

DEPARTMENT

GENERAL

PURCHASES

SALES

FINANCES

ACTIVITIES

CRM

WAREHOUSE

MANUFACTURE

JOBS & SERVICE

- ITEMS
- CUSTOMERS
 - VENDORS
 - CONTACTS
 - LOCATIONS
 - RECEIVE EMAIL

BUSINESS OVERVIEW

GENERAL

OPEN SOS

27

OPEN POS

50

SALES THIS WEEK

27

JOURNALS

LARGE OVERDUE CUST. INV.

0

HOME ACTIONS NAVIGATE REPORT

New Edit View Delete Register Customer Payments Customer - Order Summary Customer - Sales List Sales Quote Sales Invoice Sales Order Ledger Entries Statistics Comments Cash Receipt Journal Sales Journal Contact Show as List Show as Chart OneNote Notes Links Refresh Clear Filter Find

New Document Customer Navigate View Show Attached Page

Customers

Type to filter (F3) No. [v] [r] ^

Limit totals: ..28/01/21

Show results:

Where Balance (LCY) is >1,000

+Add Filter

No.	Name	Responsibi... Center	Location Code	Phone No.	Contact	Balance (LCY)	Balance D (LC
01445544	Progressive Home Furnishings		YELLOW		Mr. Scott Mitchell	1,499.03	0
01454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald	222,241.32	0
10000	The Cannon Group PLC	BIRMINGHA...	BLUE		Mr. Andy Teal	168,364.41	-292
20000	Selangorian Ltd.				Mr. Mark McArthur	96,049.99	49,633
30000	John Haddock Insurance Co.				Miss Patricia Doyle	349,615.40	110,020
32656565	Antarcticopy		YELLOW		Michael Zeman	2,582.80	2,582
35963852	Heimilispyrdi		YELLOW		Gunnar Orn Thorsteinsson	2,024.21	0
40000	Deerfield Graphics Company		YELLOW		Mr. Kevin Wright	1,328.88	1,328
42147258	BYT-KOMPLET s.r.o.		RED		Milos Silhan	1,602.90	0
43687129	Designstudio Gmunden		RED		Fr. Birgitte Vestphael	13,732.60	0
47563218	Klubben		YELLOW		Thomas Andersen	11,772.20	0
49525252	Beef House		GREEN		Frau Karin Fleischer	11,941.36	0
49633663	Autohaus Mielberg KG		GREEN			7,924.80	4,050
49858585	Hotel Pferdesee		GREEN		Herrn Jonathan Haas	14,395.75	0

Power BI Reports

Select Report Expand Report

Get started with Power BI

Sell-to Customer Sales History

- Ongoing Sales Quotes: 0
- Ongoing Sales Blanket Orders: 0
- Ongoing Sales Orders: 0
- Ongoing Sales Invoices: 0
- Ongoing Sales Return Orders: 0
- Ongoing Sales Credit Memos: 0
- Posted Sales Shipments: 1
- Posted Sales Invoices: 1
- Posted Sales Return Receipts: 0
- Posted Sales Credit Memos: 0

Customer Statistics

Balance (LCY): 1,499.03

Sales

- Outstanding Orders (LCY): 0.00
- Shipped Not Invd. (LCY): 0.00
- Outstanding Invoices (LCY): 0.00

Service

- Outstanding Serv. Orders (LCY): 0.00
- Serv Shipped Not Invoiced(LCY): 0.00
- Outstanding Serv.Invoices(LCY): 0.00

Views

All

Balance

Customer with Contact Details

Filter list by:

No.

10000..50000

Balance (LCY)

+ Filter...

Filter totals by:

Date Filter: ..01/09/24

Edit

Reset filters



10000
The Cannon Group
Robert Townes

36,794.15
32,385.59



20000
Trey Research
Helen Ray

2,494.46
1,738.46



30000
School of Fine Art
Meagan Bond

13,331.40
13,331.40



40000
Alpine Ski House
Ian Deberry

649.40
649.40



50000
Relecloud
Jesse Homer

13,205.52
9,666.72

Details | Attachments (1)

Customer No. 10000

13 Ongoing Sales Quotes	0 Ongoing Sales Blanket Orders	17 Ongoing Sales Orders	10 Ongoing Sales Invoices
0 Ongoing Sales Return Orders	0 Ongoing Sales Credit Memos	36 Posted Sales Shipments	37 Posted Sales Invoices
0 Posted Sales Return Receipts	0 Posted Sales Credit Memos		

Customer Statistics

Customer No.	10000
Balance (LCY)	36,794.15
Sales	
Outstanding Orders (LCY)	125,216.62
Shipped Not Invd. (LCY)	0.00
Outstanding Invoices (LCY)	83,177.20
Service	
Outstanding Serv. Orders (LCY)	0.00
Serv Shipped Not Invoiced(LCY)	0.00
Outstanding Serv.Invoices(LCY)	0.00
Payments	
Payments (LCY)	170,763.63
Refunds (LCY)	0.00
Last Payment Receipt Date	19/03/2020
Total (LCY)	221,809.58

View Manage | Sales Quote, Sales Invoice, Sales Order | Send Approval Request | Statement, Scheduled Statements, Bank Accounts | Direct Debit Mandates, Ship-to Addresses, Contact | Document Layouts, Sales, Quotes | Dimensions, Ledger Entries, Statistics | OneNote, Notes, Links | Refresh, Clear Filter, Go to | Previous, Next | Page

01445544 · Progressive Home Furnishings

General

No.: Credit Limit (LCY):

Name: Blocked:

Balance (LCY): 1,499.03 Total Sales: **1,499.03**

Balance Due (LCY): 0.00 Costs (LCY):

Show more fields

Address & Contact

Address

Address:

Address 2:

Country/Region Code:

City:

State:

Post Code:

[Show on Map](#)

Contact

Contact Name:

Phone No.:

Email:

Home Page:

Show more fields

Invoicing: EXPORT | FOREIGN | RETAIL

Payments: 14 DAYS

Shipping: YELLOW | Partial | EXW

Customer Picture

Import Export Delete



Attachments

Documents: 0

Sell-to Customer Sales His...

- Ongoing Sales Qu... 0
- Ongoing Sales Bla... 0
- Ongoing Sales Or... 0
- Ongoing Sales Inv... 0
- Ongoing Sales Ret... 0
- Ongoing Sales Cr... 0
- Posted Sales Ship... 1
- Posted Sales Invoi... 1
- Posted Sales Retur... 0
- Posted Sales Credi... 0

40000 · Alpine Ski House

Process Report New Document Approve Request Approval Navigate Customer Actions Related Reports Fewer options

General

Show more

No.	40000	Credit Limit (LCY)	0.00
Name	Alpine Ski House	Blocked	
Balance (LCY)	649.40	Total Sales	178.00
Balance Due (LCY)	649.40	Costs (LCY)	0.00

Address & Contact

Show more

Address		Phone No.	
Address	Walter-Gropius-Strasse 5	Mobile Phone No.	
Address 2	Park Stadt Schwabing	Email	ian.deberry@contoso.com
Country/Region Code	DE	Home Page	
City		Contact	
Postcode	DE-80807	Contact Name	Ian Deberry

Show on Map

Invoicing

EU EU

Payments

1M(8D)

Shipping

Partial

Statistics

Details Attachments (0)

Customer Picture



Sell-to Customer Sales History

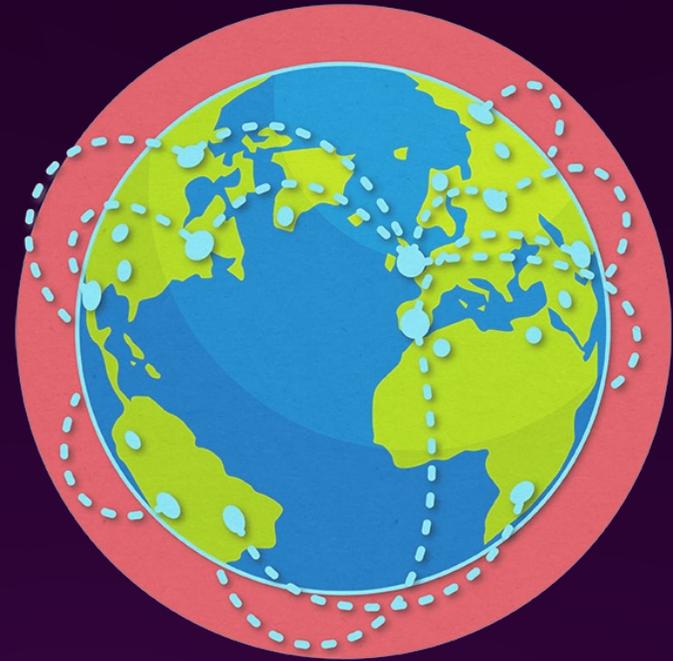
Customer No. 40000

11	0	5
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
29	29	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Customer Statistics

Customer No. 40000

DIRECTIONS FOR GETTING AROUND



MICROSOFT 365 INTEGRATIONS

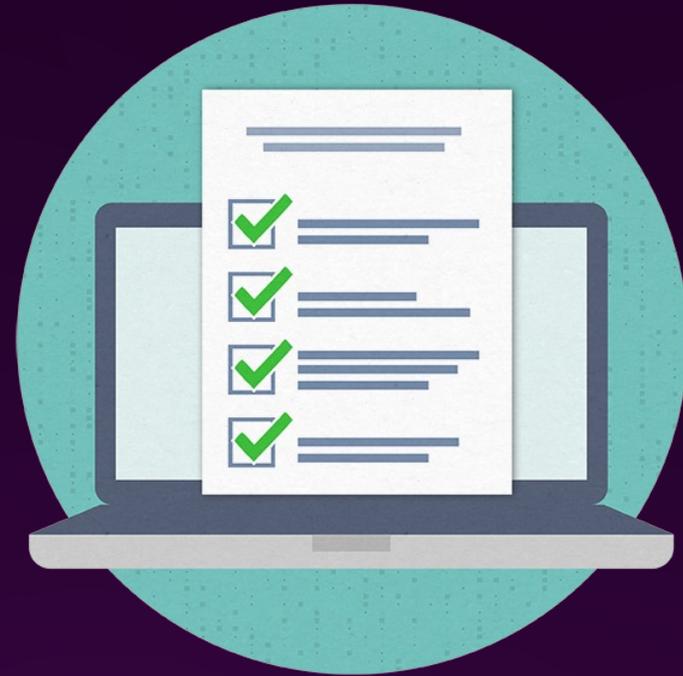


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DATA ENTRY



QUESTIONS?



We are
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We are
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We are
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**DON'T FORGET
TO RATE THIS
SESSION IN THE
USER DAY APP**

