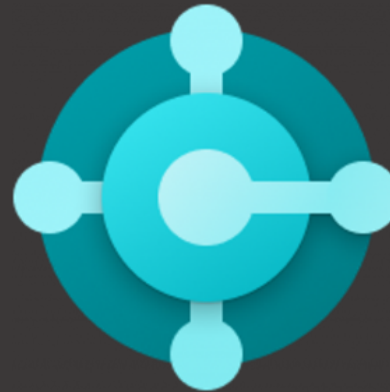




40 Tips in 40 Minutes!



Microsoft Dynamics 365
Business Central

Contents

01

Setup

02

Navigation

03

Customisation

04

Data Entry

05

Troubleshooting

06

Efficiency

Setup Tips

Some tips and tricks during setup to help you get the most out of Business Central.

1. Posting Dates

←

✓ Saved

General Ledger Setup

Home

Posting

General

VAT

Bank

Journal Templates

More options

Change Payment Tolerance

Change Global Dimensions...

General

Show more

Allow Posting From

01/04/2025

Allow Posting To

30/04/2025

Allow Deferral Posting From

01/04/2025

Unit-Amount Rounding Precision (LCY)

0.00001

Unit-Amount Decimal Places (LCY)

2:5

Mark Cr. Memos as Corrections

Use User Setup to control and override 'Allowed Posting Dates' from General Ledger Setup

[illegible]

2. Local Currency

Set up a Local Currency (LCY) in the General Ledger Setup

Customer Ledger Entries

Search Edit List Home Entry More options

Show Document Find entries... Create Reminder... Apply Entries Reverse Transaction... Create Finance Charge Memo...

Posting Date	Customer Name	Description	Department Code	Customergro... Code	Currency Code	Original Amount	Debit A
→ 3/31/2023	Relecloud	Invoice S-INV102197	SALES	MEDIUM		3,081.84	
3/25/2023	Relecloud	Invoice S-INV102192	SALES	MEDIUM		-4,596.16	
3/25/2023	Relecloud	Invoice S-INV102192	SALES	MEDIUM		4,596.16	
3/21/2023	Relecloud	Invoice S-INV102188	SALES	MEDIUM		-403.01	
3/21/2023	Relecloud	Invoice S-INV102188	SALES	MEDIUM		403.01	
2/28/2023	Relecloud	Invoice S-INV102184	SALES	MEDIUM		2,877.48	
2/22/2023	Relecloud	Invoice S-INV102179	SALES	MEDIUM		-4,999.17	
2/22/2023	Relecloud	Invoice S-INV102179	SALES	MEDIUM		4,999.17	
1/31/2023	Relecloud	Invoice S-INV102171	SALES	MEDIUM		2,877.48	
1/25/2023	Relecloud	Invoice S-INV102166	SALES	MEDIUM		-2,757.70	

General Ledger Setup

Home Posting General Tax Bank Journal Templates Automate Fewer options

Unit-Amount Roundi... 0.001
Unit-Amount Decima... 2.5
Check G/L Acc. Deleti...
Block Deletion of G/L ...
Check G/L Account U...
Mark Cr. Memos as C...
LCY Code USD
Local Currency Symbol \$

VAT in Use
Show Amounts Debit/Credit Only
Hide Payment Metho...
Posting Preview Type Standard
SEPA Non-Euro Export
SEPA Export w/o Ban...
Enable Data Check

Dimensions

If your Currency Code is blank in your ledger entries, it's LCY!

3. Exchange Rate *Service*

Currencies																
<div> ← ✓ Saved 📌 🔍 🔄 </div> <div> 🔍 + New Edit List Delete Edit View Home Exchange Rate Service More options </div> <div> 💡 Suggest Accounts 🔄 Change Payment Tolerance 🌐 Exch. Rates ⚙️ Adjust Exchange Rate 📖 Exchange Rate Adjust. Register </div>																
Code ↑	Description	ISO Code	ISO Numeric Code	Exchange Rate Date	Exchange Rate	EMU Curr...	Realised Gains Acc.	Realised Losses Acc.	Unrealised Gains Acc.	Unrealised Losses Acc.	Amount Rounding Precision	Amount Decimal Places	Invoice Rounding Precision	Invoice Rounding Type	Unit-Amount Rounding Precision	Unit-Amount Rounding Type
→ AED	United Arab Emirates di...	AED	784	02/04/2025	0.2107743	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.25	Nearest	0.001	Nearest
AUD	Australian dollar	AUD	036	02/04/2025	0.4876	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
BGN	Bulgarian leva	BGN	975	02/04/2025	0.4270748	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
BND	Brunei Darussalem dollar	BND	096	02/04/2025	0.5762417	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
BRL	Brazilian real	BRL	986	02/04/2025	0.1356438	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
CAD	Canadian dollar	CAD	124	02/04/2025	0.5411164	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
CHF	Swiss franc	CHF	756	02/04/2025	0.8760331	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
CZK	Czech koruna	CZK	203	02/04/2025	0.0334713	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
DKK	Danish krone	DKK	208	02/04/2025	0.1119392	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
DZD	Algerian dinar	DZD	012	02/04/2025	0.0057878	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
EUR	Euro	EUR	978	02/04/2025	0.8355038	<input checked="" type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
FJD	Fiji dollar	FJD	242	02/04/2025	0.3314636	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
HKD	Hong Kong dollar	HKD	344	02/04/2025	0.0994879	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
HRK	Croatian Kuna	HRK	191	21/07/2023	0.1087086	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
HUF	Hungarian forint	HUF	348	02/04/2025	0.0020744	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	1.00	Nearest	0.001	Nearest
IDR	Indonesian rupiah	IDR	360	02/04/2025	0.0000467	<input type="checkbox"/>	49900	49900	49800	49800	1.00	0:0	1.00	Nearest	0.1	Nearest
INR	Indian rupee	INR	356	02/04/2025	0.0090397	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
ISK	Icelandic krona	ISK	352	02/04/2025	0.0058148	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
JPY	Japanese yen	JPY	392	02/04/2025	0.0051636	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest
KES	Kenyan Shilling	KES	404	02/04/2025	0.0059861	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.50	Nearest	0.001	Nearest
MAD	Moroccan dirham	MAD	504	02/04/2025	0.0803821	<input type="checkbox"/>	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001	Nearest

4. Stockout Warning

Sales & Receivables Setup

Customer Groups | Payments | More options

General

Discount Posting All Discounts ▾

Credit Warnings Both Warnings ▾

Stockout Warning ☒

Shipment on Invoice ☒

Return Receipt on Cre... ☐

Invoice Rounding ☒

Default Item Quantity .. ☐

Create Item from It... ☐

Create Item from Des... ☐

Copy Customer Nam... ☒

Copy Comments Ord... ☒

Copy Comments Ord... ☒

Copy Cmts Ret.Ord. t... ☒

Copy Cmts Ret.Ord. t... ☒

Allow Tax Difference ... ☒

Calc. Inv. Discount ☐

Tax Bus. Posting Gr. (...) ▾

Exact Cost Reversing ... ☐

Check Prepm. when ... ☐

Prepm. Auto Update ... Never ▾

Sales Order

S-ORD101001 · Adatum Corporation

✕ The available inventory for item 1925-W is lower than the entered quantity at this location. Show details | Don't show again ▾

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

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

New Line Delete Line Select items...

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity
Item	1996-S		ATLANTA Whiteboard, base		12		
→ Item	1925-W		Conference Bundle 1-6		10		

Subtotal Excl. Tax (USD) 18,655.60 Total Excl. Tax (USD) 18,655.60

Inv. Discount Amount Excl. Ta... 0.00 Total Tax (USD) 1,119.34

For a *warning* that you do not have enough inventory

5. Prevent Negative Inventory

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

Error Messages

Search Open Related Record

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...		-

You can't say that we didn't warn you...

6. Languages and Regions

My Settings - USER_9AFAE48EF6994668B4D33EF3B81F1381

Role Sales and Relationship Manager ...

Company CRONUS UK Ltd. ...

Work Date 12/04/2021 ...

Region English (United Kingdom) ...

Language English (United Kingdom) ...

Time Zone (UTC+00:00) Dublin, Edinburgh, Lisbon, London ...

Notifications [Change when I receive notifications.](#)

Teaching Tips ☒

Legacy Action Bar ☐

Files

Cloud Storage [user_9afae48ef6994668b4d33ef3b81f1381's files on OneDrive](#)

Security

Your last sign in was on 14/04/25 12:24.

Region English (United Kingdom)

Region

Specifies the regional settings, such as date and numeric format, on all devices. You must sign out and then sign in again for the change to take effect.

[Show Help](#)

Notifications [Change when I receive notifications.](#)

Available Languages

Name ↑

→	English (United Kingdom)	⋮
	English (United States)	
	Estonian (Estonia)	
	Finnish (Finland)	
	French (Belgium)	
	French (Canada)	
	French (France)	
	French (Switzerland)	
	German (Austria)	
	German (Germany)	
	German (Switzerland)	
	Greek (Greece)	
	Hungarian (Hungary)	
	Icelandic (Iceland)	
	Italian (Italy)	

OK Cancel

Define your Language and Region from your settings

* No more 04/30/2025... unless that's your thing

7. Teaching Tips

From 'My Settings' enable or disable teaching tips.

Teaching Tips



About vendors



Here you overview all registered vendors that you purchase goods and services from. With [Vendor Templates](#) you can quickly register new vendors having common details defined by the template.

Show Help

Take a tour

New Document ▾

Vendor ▾

Prices & Discounts ▾

More options

Create a new document



Get started on a new credit memo, order, or other document for the vendor selected in the list

1 of 3

Next

8. Admin Centre Notifications

Dynamics 365 Business Central admin center

Environments

Notification Recipients

Microsoft Entra Apps

Telemetry

+ Add recipient - Remove recipient

Notification Recipients

Name	Email Address
TNP	BCUpdateAlert@thenavpeople.co.uk

×

Add recipient

Add an email to receive notifications

Name *

Email Address *

Navigation Tips

Some tips and tricks to help you navigate around BC including some:

- Keyboard shortcuts
- Extra information
- Wildcard searches

9. Role Explorer

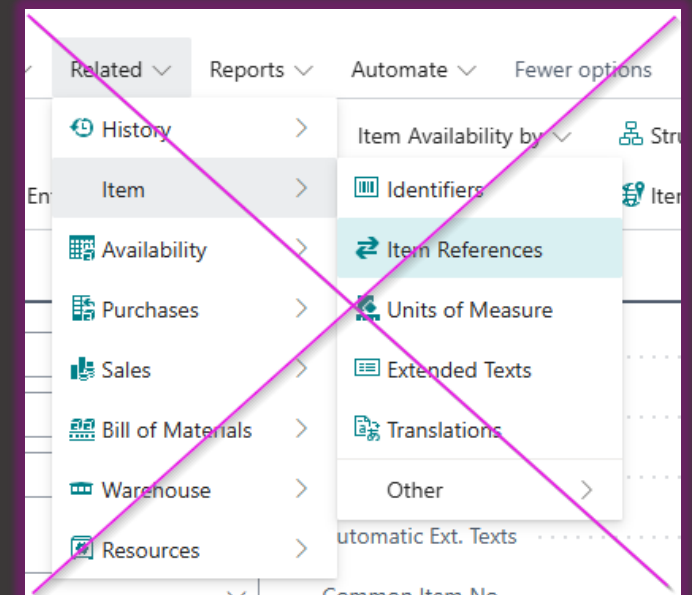
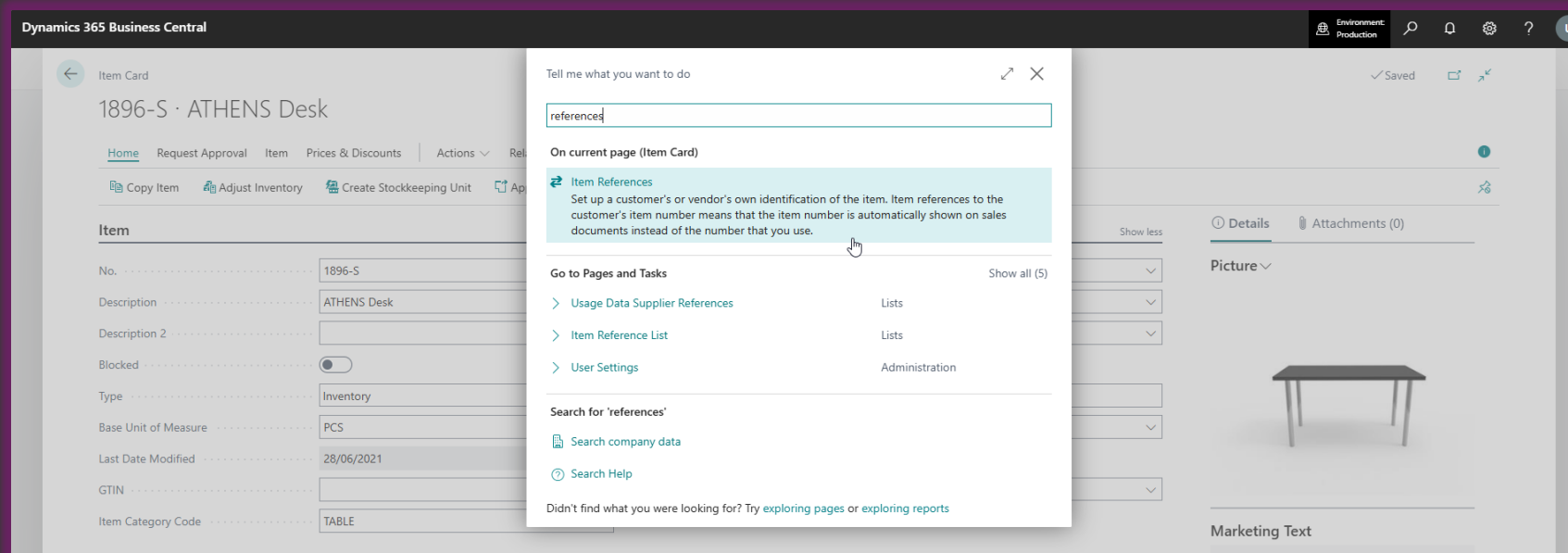
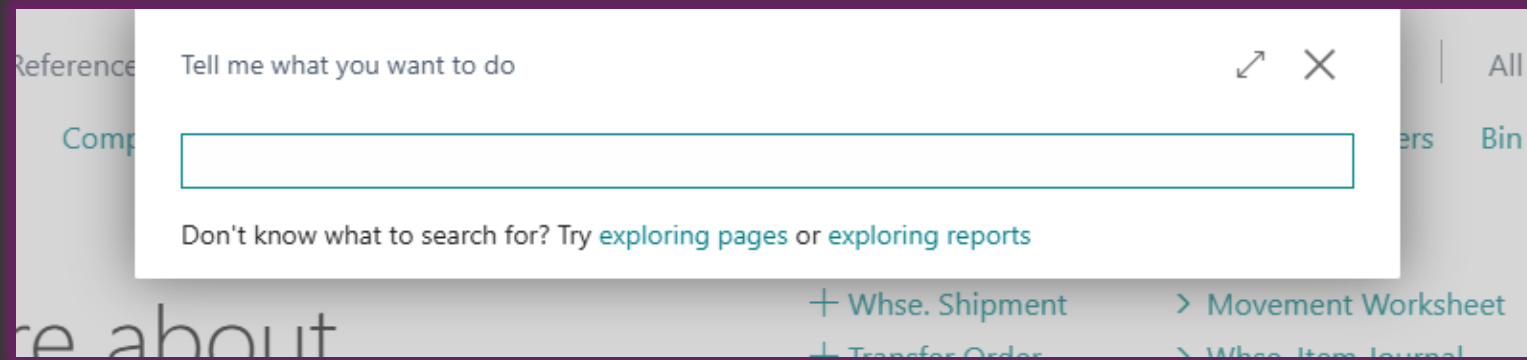
Press SHIFT+F12 for Role Explorer...

The screenshot shows the Dynamics 365 Business Central Role Explorer interface. At the top, the header bar displays 'Dynamics 365 Business Central' on the left and 'Environment: Production' on the right, along with navigation icons. Below the header, the breadcrumb trail shows 'CRONUS UK Ltd.' and a search bar. The main content area is titled 'My Business Central Business Manager'. It features a left-hand navigation pane with categories: 'Home (5)' (Customers, Vendors, Items, Bank Accounts, Chart of Accounts), 'Shopify (9)' (Shops, Customers, Products, Orders, Refunds, Returns, Gift Cards, Transactions, Payouts), 'Finance (20)' (General Journals, Chart of Accounts, G/L Account Categories, G/L Budgets, Fixed Assets, Financial Reporting, Sales Budgets, Purchase Budgets, Sales Analysis Reports, Purchase Analysis Reports, Inventory Analysis Reports, VAT Returns, Currencies, Employees, VAT Statements, Dimensions, Statistical Accounts, Allocation Accounts, Posted General Journals, Intrastat Reports), 'Cash Management (13)' (Cash Flow Forecasts, Chart of Cash Flow Accounts, Cash Flow Manual Revenues, Cash Flow Manual Expenses, Cash Receipt Journals, Payment Journals, Bank Accounts, Bank Acc. Statements, Payment Recon. Journals, Direct Debit Collections, Payment Terms, Bank Deposits, Bank Account Reconciliations), 'Sales (17)' (Customers, Items, Item Charges, Sales Quotes, Sales Orders, Blanket Sales Orders, Sales Invoices, Sales Credit Memos, Sales Return Orders, Reminders, Finance Charge Memos, Posted Sales Invoices, Posted Sales Credit Memos, Posted Sales Return Receipts, Posted Sales Shipments, Issued Reminders, Issued Finance Charge Memos), and 'Purchasing (13)' (Vendors, Incoming Documents, Item Charges, Purchase Quotes, Purchase Orders, Blanket Purchase Orders, Purchase Invoices, Purchase Credit Memos, Purchase Return Orders, Posted Purchase Credit Memos, Posted Purchase Receipts, Posted Purchase Return Shipments). A mouse cursor is visible over the 'Cash Management' section.

... for a hierarchical view of your personal role

10. Tell Me Feature

Keyboard shortcut – ALT+Q



11. Help!

- CTRL+F1 for help
- Link to relevant Microsoft Learn page
- About apps on this page
- Help & Support to Page Inspection



12. Bookmark Pages



Use the bookmark icon to save frequently used pages for quick access.



- Navigate to the page you want to bookmark
- Click the bookmark icon
- Now easy access from your Role Centre

13. Tool Tips

No. ↑	Name	Responsibility Centre	Location Code	Phone No.	Contact	Search Name
10000	Fabrikam, Inc.				Contact Specifies the name of the person you regularly contact when you do business with this vendor. Show Help	FABRIKAM, INC.
20000	First Up Consultants					FIRST UP CONSULT...
30000	Graphic Design Institute					GRAPHIC DESIGN I...
40000	Wide World Importers					WIDE WORLD IMPO...

Costs & Posting

Show less

Cost Details

[Costing Method](#) FIFO ▾

Costing Method
Specifies how the item's cost flow is recorded and whether an actual or budgeted value is capitalised and used in the cost calculation.
[Show Help](#)

Last Direct Cost 506.60

Net Invoiced Qty. 5

Cost is Adjusted ☐

Cost is Posted to G/L ☐

Purchase Prices & Discounts [Create New...](#)

Posting Details

Gen. Prod. Posting Group RETAIL ▾

VAT Prod. Posting Group STANDARD ▾

Inventory Posting Group RESALE ▾

Default Deferral Template ▾

Foreign Trade

Commodity Code ▾

Country/Region of Origin Code ▾

Exclude from Intrastat Report ☒

Supplementary Unit of Measure ▾

14. Focus Mode

CTRL + SHIFT + F12

←

Sales Order

✓ Saved

101001 · Adatum Corporation

Lines

Manage

Line

Order

New Line

Delete Line

Select items...

Subtotal Excl. VAT (GBP)

10,880.40

Total Excl. VAT (GBP)

10,880.40

Inv. Discount Amount Excl. VAT (GBP)

0.00

Total VAT (GBP)

2,176.08

Invoice Discount %

0

Total Incl. VAT (GBP)

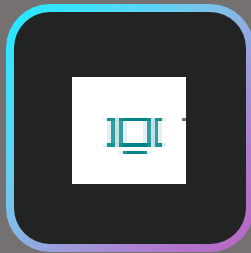
13,056.48

15. List Layout Options



List

No. #	Name	Responsibility Centre	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
10000	Adatum Corporation				Robert Townes	0.00	0.00	145,087.20	170,763.63
20000	Trey Research				Helen Ray	2,251.80	1,501.20	38,066.60	43,428.12
30000	School of Fine Art				Meagan Bond	32,644.30	31,407.70	144,894.60	112,250.30
40000	Alpine Ski House				Ian Deberry	2,617.50	2,617.50	46,357.80	42,932.30
50000	Relecloud				Jesse Homer	6,491.88	4,227.84	54,482.70	58,887.36
C00010						0.00	0.00	0.00	0.00



Tall Tiles

No. #	Name	Responsibility Centre	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
10000	Adatum Corporation				Robert Townes	0.00	0.00	145,087.20	170,763.63
20000	Trey Research				Helen Ray	2,251.80	1,501.20	38,066.60	43,428.12
30000	School of Fine Art				Meagan Bond	32,644.30	31,407.70	144,894.60	112,250.30
40000	Alpine Ski House				Ian Deberry	2,617.50	2,617.50	46,357.80	42,932.30
50000	Relecloud				Jesse Homer	6,491.88	4,227.84	54,482.70	58,887.36
C00010						0.00	0.00	0.00	0.00



Tiles

No. #	Name	Responsibility Centre	Location Code	Phone No.	Contact	Balance (LCY)	Balance Due (LCY)	Sales (LCY)	Payments (LCY)
10000	Adatum Corporation				Robert Townes	0.00	0.00	145,087.20	170,763.63
20000	Trey Research				Helen Ray	2,251.80	1,501.20	38,066.60	43,428.12
30000	School of Fine Art				Meagan Bond	32,644.30	31,407.70	144,894.60	112,250.30
40000	Alpine Ski House				Ian Deberry	2,617.50	2,617.50	46,357.80	42,932.30
50000	Relecloud				Jesse Homer	6,491.88	4,227.84	54,482.70	58,887.36
C00010						0.00	0.00	0.00	0.00

16. Pop-Out Pages

Sales Order - 101001 · Adatum Corporation

General

Customer Name: Adatum Corporation
Contact: Robert Townes
Document Date: 4/2/2021
Posting Date: 4/2/2021
VAT Date:
Order Date: 4/2/2021
Due Date: 5/2/2021
Requested Delivery Date: 4/3/2021
External Document No.:
Status: Open

Lines

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount
→ Item	1996-S		ATLANTA Whiteboard, base		12			PCS	906.70	

About sales orders

Use a sales order when you pay an order, and when you use down payments. For sales that are invoiced in one go, sales invoices are typically used instead.

Show Help Take a tour

Keyboard shortcut: ALT+SHIFT+W

17. Wildcard Searches

| the pipe

e.g. C00001|C00002|C00003

' ' exact character match

e.g. 'Chair'

* the asterisk

e.g. C001* , *ones , *Co*

@ case sensitivity

e.g. @chair

<> not equal to

e.g. <>50000

? Unknown

e.g. Jonath?n

.. interval

e.g. 01/04/2025..31/04/2025

1000..2000|<>1500 the combo

Customisation Tips

- Saving Your Filters
- Personalising Your Pages
- Custom Reports

18. Save Filters as Views

Dynamics 365 Business Central

Environment: Production

CRONUS UK Ltd. | Sales & Purchases | Reference Data | Journals | Worksheet | Posted Documents | Registered Documents | All Reports

Sales Orders: Open Sales Orders | + New | Delete | Home | Release | Post... | Print/Send | Order | More options

Views

- All
- Shipped Not Invoiced
- Open Sales Orders**
- Ready to Ship
- Partially Shipped
- Delayed
- Released

Filter list by:

- Document Type: Order
- Status: Open

+ Filter...

Filter totals by...

No. ↑	Saptify Order No.	Saptify Risk Level	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Document Date	Status ▼	No. of Items	Shipment No.	Compl... Shipped	An Not
101001	—		10000	Adatum Corporation				02/04/2021	Open	1	—	No	
101002	—		10000	Adatum Corporation				01/05/2021	Open	2	—	No	
101003	—		30000	School of Fine Art				22/04/2021	Open	1	—	No	
101004	—		40000	Alpine Ski House				13/05/2021	Open	1	—	No	

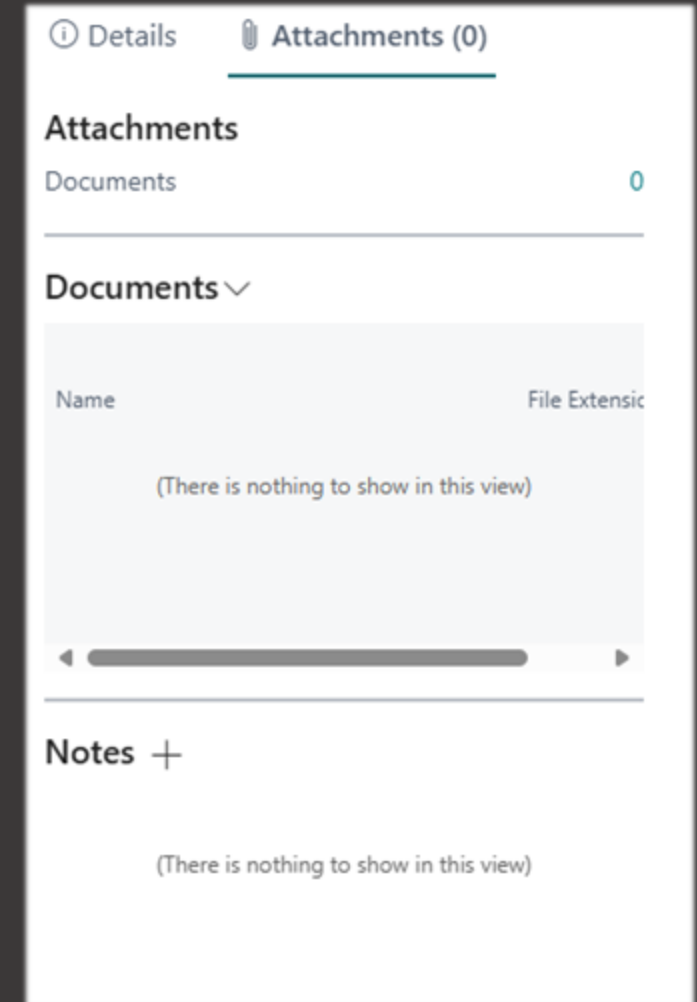
19. Notes and Attachments

Notes

- Attach text to the notes
- Alt+O Keyboard shortcut

Attachments

- Word, Excel, etc.
- PDF
- Images



20. Personalise Your Pages

Dynamics 365 Business Central

Personalising: Customers + Field

Customers

+ New Manage Home New Document Customer Prices & Discounts Report More options

Register Customer Payments Send Email Apply Template

No.	Name	Responsibility Centre	Location Code	Phone No.	Contact	Balance (LCY)
10000	Adatum Corporation				Robert Townes	0.00
20000	Trey Research				Helen Ray	2,251.80
30000	School of Fine Art				Meagan Bond	32,644.30
40000	Alpine Ski House				Ian Deberry	2,617.50
50000	Relecloud				Jesse Homer	6,491.88
C00010						0.00

Details Attachments (0)

Power BI

Get started with Power BI

Sell-to Customer Sales History

Customer No. 10000

0 0 2

Outgoing Sales Quotes Outgoing Sales Blended Orders Outgoing Sales Orders

2 0 1

Search

Add Field to Page

Place fields by dragging from the list to a position on the page.

Recommended fields

Option Application Method

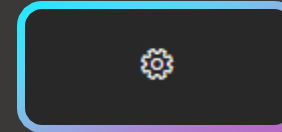
Code Base Calendar Code

Option Blocked

Boolean Combine Shipments

Code Country/Region Code

Boolean Coupled to Dataserve



- Click on the gear/cog icon

Dynamics 365 Business Central

Personalising: Lines + Field

Sales Order

101001 · Adatum Corporation

Home Prepare Approve Print/Send Request Approval Order Actions Related Automate Fewer options

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

Lines Manage Line Order Page Copilot

New Line Delete Line Service Commitments Select Items...

Type	No.	Variant Code	Item Reference No.	Description	Location Code	Quantity	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Service Commitments	Customer Contract No.
Item	1996-S			ATLANTA Whiteboard, base		12		PCS	906.70		10,880.40	0	
Item	1996-S			ATLANTA Whiteboard, base		12		PCS	906.70		10,880.40	0	

Subtotal Excl. VAT (GBP) 21,760.80 Total Excl. VAT (GBP) 21,760.80

Inv. Discount Amount Excl. VAT (GBP) 0.00 Total VAT (GBP) 4,352.16

Invoice Discount % 0 Total Incl. VAT (GBP) 26,112.96

21. Customise Reports

From the Report Selection page you can choose which report Business Central will run.

- > Report Selection - Sales
- > Report Selection - Project
- > Report Selection - Purchase
- > Report Selection - Inventory
- > Report Selection - Cash Flow
- > Report Selection - Warehouse
- > Report Selection - Bank Account

Report Selection - Sales

✓ Saved

Usage: Quote

Manage

Sequence ↑	Report ID	Report Name
→ 1	1304	Sales - Quote

- Quote
- Blanket Order
- Order
- Invoice
- Work Order
- Return Order
- Credit Memo
- Shipment
- Return Receipt
- Sales Document - Test
- Prepayment Document - Test
- Archived Quote
- Archived Order
- Archived Return Order
- Pick Instruction
- Customer Statement
- Draft Invoice
- Pro Forma Invoice
- Archived Blanket Order

22. Feature Management

← Feature Management		✓ Saved							
Feature Management: All ▾		Edit List							
Feature		Automatically enabled from							
		Automati... enabled from version							
		Enabled for							
		Get started							
		Current Company Status							
		Update Start Date/Time							
→	Feature Update: Enable multiple users to post warehouse entries at the same time	Learn more	2025 Wave 2 (from October 2025...	27.0	All Users		Enabled		
	Feature Update: Replace the existing EU 3-Party Trade Purchase functionality with the new EU 3-Party Trade Purchase extension	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	—	Disabled		
	Feature Update: Enable use of new extensible exchange rate adjustment, including posting review	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	—	Disabled		
	Feature Update: Enable use of new extensible invoice posting engine	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	—	Disabled		
	Feature: Use optimised text search in lists	Learn more	2025 Wave 2 (from October 2025...	27.0	None	Try it out	Disabled		
	Feature Update: Enable use of G/L currency revaluation	Learn more	2025 Wave 2 (from October 2025...	27.0	None	—	Disabled		
	Feature: Enable legacy locking scheme in AL	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	—	Disabled		
	Feature Update: Enable use of package tracking in physical inventory orders	Learn more	2025 Wave 2 (from October 2025...	27.0	None	—	Disabled		
	Feature Update: Use new communication texts for reminder terms	Learn more	2025 Wave 2 (from October 2025...	27.0	None	—	Disabled		
	Feature: Enable using SAF-T Audit Files Exports	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	—	Disabled		
	Feature Update: New sales pricing experience	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	—	Disabled		
	Feature Update: Auto-save with every field change	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	Try it out	Disabled		
	Feature: Enable using bulk operations for Shopify connector	Learn more	2025 Wave 1 (from April to Septe...	26.0	None	—	Disabled		



Data Entry Tips

- Overlapping Excel functionality
- Data Entry keyboard tips and tricks
- Inputting data outside of BC






23. Excel-like Calculations


Perform calculations directly in numeric fields, like 10+10 to get 20.

Batch Name DEFAULT

Manage Home Request Approval Payroll Line Incoming Document Page | More options

 Post |  Get Standard Journals...  Renumber Document Numbers  Reconcile  Apply Entries...

Posting Date		Description	Currency Code	EU 3-Party Trade	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Amount (LCY)	Bal. Account Type	Bal. Account No.
12/31/2019				<input type="checkbox"/>				20.00	20.00	G/L Account	

24. Copy Data

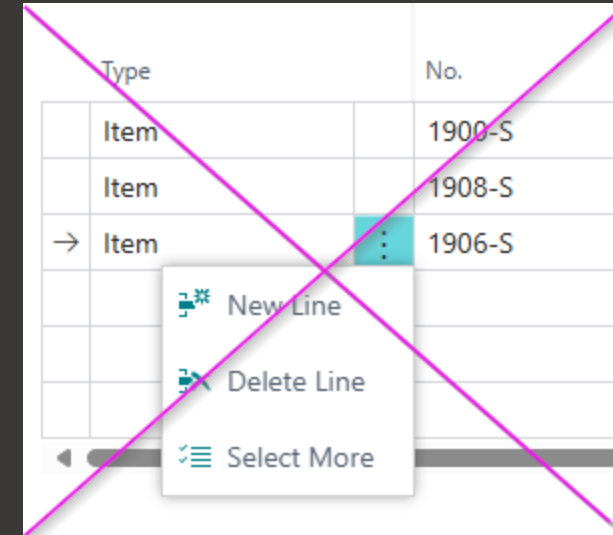
Click F8 to copy from the cell above

Lines 🔍 <u>Manage</u> Line Order 🔗 🔗													
➕ New Line ✖ Delete Line 📋 Service Commitments 🔍 Select items... 🔗													
Type	No.	Variant Code	Item Reference No.	Description	Location Code	Quantity	Reserved Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Service Commitments	Customer Contract No.
Item	1996-S			ATLANTA Whiteboard, base		12	—	PCS	906.70		10,880.40	0	—
→ Item	⋮	1996-S		ATLANTA Whiteboard, base		* 12	—	PCS	906.70		*	0	—

25. Insert & Delete Lines

CTRL + INSERT

CTRL + DELETE



Lines <u>Manage</u> Line Functions Order												
New Line Delete Line Select items...												
Type	No.	Variant Code	Item Reference No.	Common Item No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	Line A B
Item	1900-S				PARIS Guest Chair, black			8	—	PCS	97.50	
→ Item	*											
Item	1908-S				LONDON Swivel Chair, blue			20	—	PCS	96.10	1,
Item	1906-S				ATHENS Mobile Pedestal			20	—	PCS	219.50	4,

26. Autosave



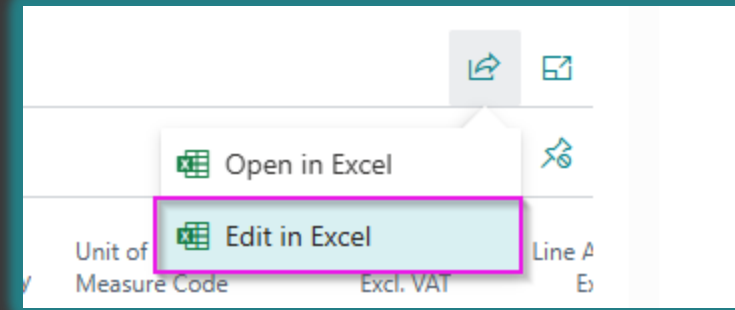
Not saved

Saving...

✓ Saved

Remember that data is automatically saved, so you don't lose your work.

27. Edit in Excel



	A	B	C	H	I	J	O	Q	V	Y	AC	AD	AE	AF
1	Document Type	Type	No.	Variant Code	Common Item No.	Catalogue	Description	Drop Shipment	Quantity	Unit of Measure Code	Unit Cost (LCY)	Unit Price (LCY)	VAT Liable	VAT Area Code
2	Order	Item	1900-S			False	PARIS Guest Chair, black	False	8	PCS	97.5	125.1	True	
3	Order	Item	1908-S			False	LONDON Swivel Chair, blue	False	20	PCS	96.1	123.3	True	
4	Order	Item	1906-S			False	ATHENS Mobile Pedestal	False	20	PCS	219.5	281.4	True	
5	Order	Item	1907-S			False		False	5	PCS			True	
6	Order	Item	1915-B			False		False	16	PCS			True	
7	Order	Item	2700-S			False		False	50	PCS			True	
8														
9														
10														
11														
12														
13														
14														
15														
16														
17														
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32														
33														
34														
35														
36														
37														

Microsoft Dynamics Office Add-in

Data ConnectorRowan Blackwell

+ New

Refresh

Publish

Filter

Design

Publish all data source changes

Troubleshooting Tips

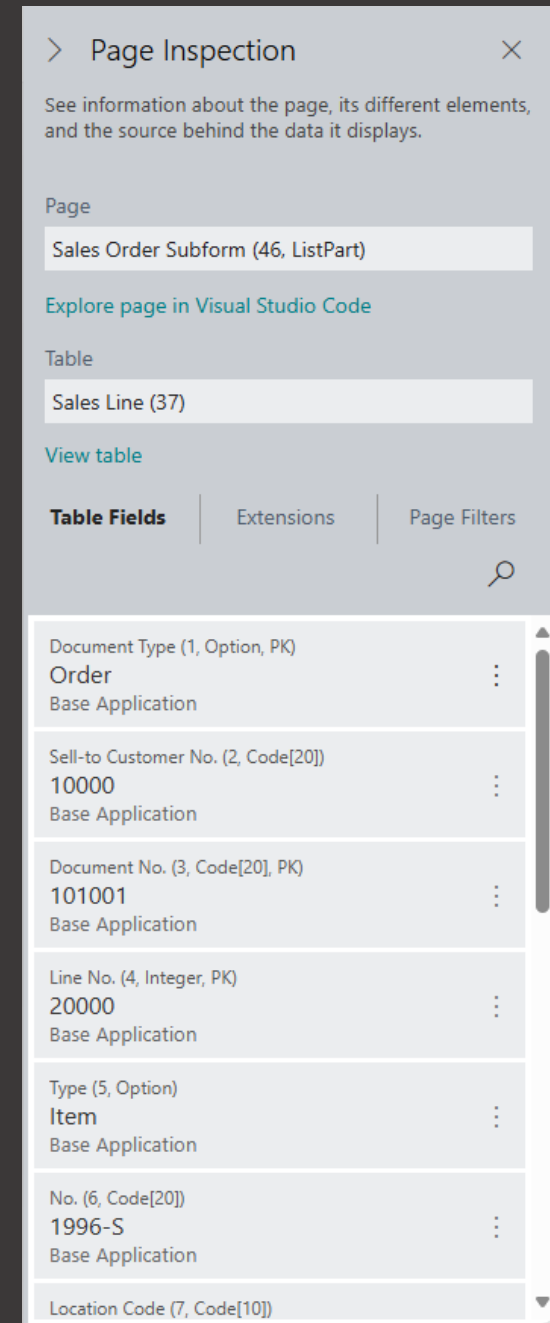
28. Page Inspection

CTRL + ALT + F1

Allows for field identification

Page & Table IDs (Helpful when logging a ticket)

Extensions & Page Filters



29. Preview Posting

Sales Order

101001 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Actions Related Automate Fewer options

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

Post...
Post and Send...
Preview Posting
Post and New...

Review the different types of entries that will be created when you post the document or journal. (Ctrl+Alt+F9)

Document Date 15/04/2025
Posting Date 15/04/2025
VAT Date 15/04/2025
Order Date 15/04/2025

Adatum Corporation
Due Date 15/05/2025
Requested Delivery Date 15/04/2025
External Document No.
Shipment No.
Status Open

Posting Preview

Show Related Entries

Related Entries	No. of Entries
G/L Entry	5
Cust. Ledger Entry	1
Item Ledger Entry	1
VAT Entry	1
Detailed Cust. Ledg. Entry	1
Value Entry	1

Tip: Keyboard Shortcut
CTRL+ALT+F9

30. Test Report

General Journal - Test

CRONUS UK Ltd.

23 April 2025

Page 1 / 1

USER_9AFAE48EF6994668B4D33EF3881F1381

Journal Template Name: GENERAL

Journal Batch: DEFAULT

Gen. Journal Line: Journal Template Name: GENERAL, Journal Batch Name: DEFAULT

Posting Date	Document Type	Document No.	Account Type	Account No.	Name	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. Account No.	Balance (LCY)
31/05/25		123	G/L Account	10100	Income, Services	Income, Services	Sale	DOMESTIC	SERVICES	-5.00		-5.00
Warning!		The Posting Date is not within your range of allowed posting dates.										
31/05/25		123	G/L Account	20100	Cost of Materials	Cost of Materials		DOMESTIC	RETAIL	15.00		15.00
Warning!		Gen. Posting Type must be specified.										
Warning!		The Posting Date is not within your range of allowed posting dates.										
Warning!		123 is out of balance by 10.										
Warning!		As of 31/05/25, the lines are out of balance by 10.										
Warning!		The total of the lines is out of balance by 10.										
Total (LCY)										10.00		10.00

Preview Posting only shows first error

Test Report shows the errors on every line

31. Check Posting Errors

The screenshot displays the 'Error Messages' window. At the top, there are navigation icons and a toolbar with buttons for 'Accept recommended action', 'Hide fixed errors', and 'Open related record'. Below this is a table with four columns: 'Description', 'Recommended action', 'Message Type', and 'Status'.

Description	Recommended action	Message Type	Status
<i>Posting Date is not within your range of allowed posting dates.</i>	—	Error	
<i>There is nothing to post because the document does not contain a quantity or amount.</i>	—	Error	

To the right of the table is a 'Details' panel. It contains sections for 'Context', 'Error Location', 'Source', 'Support', and 'Troubleshooting'. The 'Context' section shows 'Record' as 'Purchase Header: Order,PO04130' and 'Field Name' as 'Posting Date'. The 'Error Location' section shows 'Record' as '—' and 'Field Name' as '—'. The 'Source' section shows 'Record' as 'User Setup' and 'Field Name' as 'Allow Posting From'. The 'Support' section has links for 'Help & Documentation' and 'Additional Information...Check purchase document fi...'. The 'Troubleshooting' section shows a 'Timestamp' of '21/04/2025 14:11'.

* Errors can be helpful and do not always mean that something is broken.

32. Update Extensions

Dynamics 365 Business Central admin center

Environments > Manage apps

Environment: Production-Business Central App Type: Global Refresh

Business Central Intelligent Cl	Microsoft	Global	25.1.25873.26186	Up to Date	Uninstall
Business Foundation	Microsoft	Global	25.1.25873.26186	Up to Date	N/A
CS Transfer Management	Central Solutions	Global	24.0.0.0	25.0.0.0	Install update Uninstall
Company Hub	Microsoft	Global	25.1.25873.26186	Up to Date	Uninstall
Contoso Coffee Demo Datas	Microsoft	Global	25.1.25873.26186	Up to Date	Uninstall

ADMINS and SUPER users, this one is for you!

33. Change Logs

The Change Log is designed to track all direct modifications made by users to data in the database.

You can easily turn the Change Log on or off from the Change Log Setup page.

Change Log Setup

Setup | More options

General

Change Log Activated ☒

IMPORTANT

Tracking changes can impact performance, which can cost you time, and increase the size of your database, which might cost you money. To reduce those costs, consider the following:

- Use caution when choosing the tables and operations.
- Do not add ledger entries and posted documents. Instead, prioritise system fields such as Created By and Created Date.
- Do not use the All Fields tracking type. Instead, choose Some Fields and track only the most important fields.

Change Log Setup (Table) List

🔍 | Edit List

	ID ↑	Name	Log Insertion	Log Modification	Log Deletion
→	3	Payment Terms	<div>Some Fields</div>		
	4	Currency			
	5	Finance Charge Terms			
	6	Customer Price Group			
	7	Standard Text			
	8	Language			
	9	Country/Region			
	10	Shipment Method			

34. User Permission Errors



You do not have the following permissions on TableData
Approval Entry: Modify.

To view details about your permissions, see the Effective Permissions page. To report a problem, refer to the following server session ID: '9112'.

OK



User Card



user_9afae48ef6994668b4d33ef3b81f1381

Details

Effective Permissions

Send Email

Sent Emails

More options

General

User Name USER_9AFAE48EF6994668B4D33EF3B81F1381

Contact Email

Full Name user_9afae48ef6994668b4d33ef3b81f1381

Microsoft 365

Status Active

Authentication Email

Authentication Status

Filters



Filter list by:

Object Type

Table Data

Object Name

Approval Entry

+ Filter...

Reset filters

Permissions

	Object Type ↑	Object Name ▼	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	In User-Defined Permission Set
→	Table Data	Approval Entry	Indirect	Indirect	Indirect	Indirect		<input checked="" type="checkbox"/>

By Permission Set

Permission Set	Source	Type ↑	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission
→ SHOPIFY.SC...	Normal	System	Indirect	Indirect	Indirect	Indirect	
—	Entitlement	System	Yes	Indirect	Indirect	Indirect	

35. Clear Browser History Cache

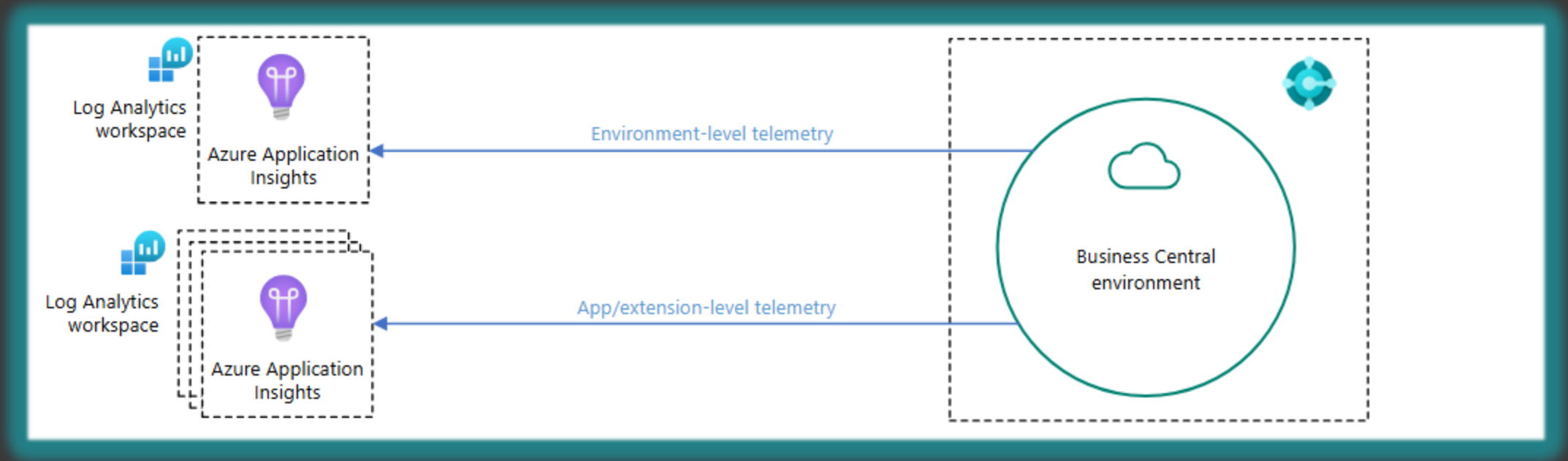


**Improved
Performance**

**Data
Accuracy**

Troubleshooting

36. Telemetry



Efficiency Tips

Things you can do to make your life
easier (with BC).

37. Modern Search

CRONUS UK Ltd.

Sales & Purchases

Reference Data

Journals

Worksheet

Posted Documents

Registered Documents

All Reports

Items: All

Search

+ New

Delete

Home

Item

Prices & Discounts

Attributes

Report

More options

Views

All

Filter list by...

Filter totals by...

No. ↑	Item	Item Category Code	Inventory	Lead Time Calculation	Base Unit of Measure	Commodity Code	Stockkee... Unit Exists	We
1896-S	Desk	TABLE	5		PCS		No	
1900-S	Guest Chair, black	CHAIR	0		PCS		No	
1906-S	Mobile Pedestal	TABLE	5		PCS		No	
1908-S	LONDON Swivel Chair, blue	CHAIR	5		PCS		No	
1920-S	ANTWERP Conference Table	TABLE	10		PCS		No	
1925-W	Conference Bundle 1-6		0		PCS		No	
1952-W	Conference Bundle 1-6		0		PCS		No	
1950-S	ANTWERP Conference Table	TABLE	10		PCS		No	
1908-S	LONDON Swivel Chair, blue	CHAIR	5		PCS		No	

Search in 'Items'

Use modern search (faster)

Use legacy search

Learn more about search

38. Using Filters instead of Search

Item 1960-S ROME Guest Chair, green

Item Ledger Entries | Find entries... | Entry | Order Tracking | Application Worksheet | Automate | Fewer options

Views: All

Filter list by:

Item No. 1960-S

Reset filters

Posting Date	Document Type	Document No.	Item No.	Department Code	Customergro... Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl)
22/02/2021	Sales Shipment	102176	1960-S	SALES	SMALL	-2	-2	0	250.20	-195.00	0.00
19/02/2021	Sales Shipment	102174	1960-S	SALES	SMALL	-4	-4	0	500.40	-390.00	0.00
15/02/2021	Purchase Receipt	107190	1960-S			8	8	0	0.00	780.00	0.00
01/02/2021	Sales Shipment	102172	1960-S	SALES	LARGE	-1	-1	0	125.10	-97.50	0.00
24/01/2021	Sales Shipment	102163	1960-S	SALES	SMALL	-2	-2	0	250.20	-195.00	0.00
21/01/2021	Sales Shipment	102160	1960-S	SALES	SMALL	-4	-4	0	500.40	-390.00	0.00
16/01/2021	Purchase Receipt	107177	1960-S			7	7	0	0.00	682.50	0.00
01/01/2021	Sales Shipment	102158	1960-S	SALES	LARGE	-1	-1	0	125.10	-97.50	0.00
18/12/2020	Sales Shipment	102150	1960-S	SALES	SMALL	-1	-1	0	125.10	-97.50	0.00
14/12/2020	Sales Shipment	102146	1960-S	SALES	SMALL	-2	-2	0	250.20	-195.00	0.00
09/12/2020	Purchase Receipt	107165	1960-S			4	4	0	0.00	390.00	0.00
27/11/2020	Sales Shipment	102144	1960-S	SALES	LARGE	-1	-1	0	125.10	-97.50	0.00
19/11/2020	Sales Shipment	102139	1960-S	SALES	SMALL	-2	-2	0	250.20	-195.00	0.00
16/11/2020	Sales Shipment	102136	1960-S	SALES	SMALL	-3	-3	0	375.30	-292.50	0.00
09/11/2020	Purchase Receipt	107152	1960-S			6	6	0	0.00	585.00	0.00
01/11/2020	Sales Shipment	102132	1960-S	SALES	LARGE	-1	-1	0	125.10	-97.50	0.00
17/10/2020	Sales Shipment	102123	1960-S	SALES	SMALL	-2	-2	0	250.20	-195.00	0.00
14/10/2020	Sales Shipment	102120	1960-S	SALES	SMALL	-3	-3	0	375.30	-292.50	0.00

Purchase Order No.

39. Analysis Mode



Allows the creation of detailed views and financial insights.

CRONUS UK Ltd. | Finance | Cash Management | Sales | Purchasing | Scaptify | Shopify | All Reports |

Items: All | Analysis 1 | Inventory under £100 | +

No.	Description	Inventory	Unit Price
1928-S	AMSTERDAM Lamp	8.00	35.60
1968-S	MEXICO Swivel Chair, black	10.00	95.00
2000-S	SYDNEY Swivel Chair, green	38.00	95.00
		56.00	225.60

☐ Pivot Mode

Search...

☒ No.

☒ Description

☒ Inventory

☐ Location Code

☐ Base Unit of Measure

☒ Unit Price

☐ Type

☐ No. 2

☐ Item BarCode

☐ Substitutes Exist

☐ Assembly BOM

☐ Cost is Adjusted

☐ Reverse Charge Applies

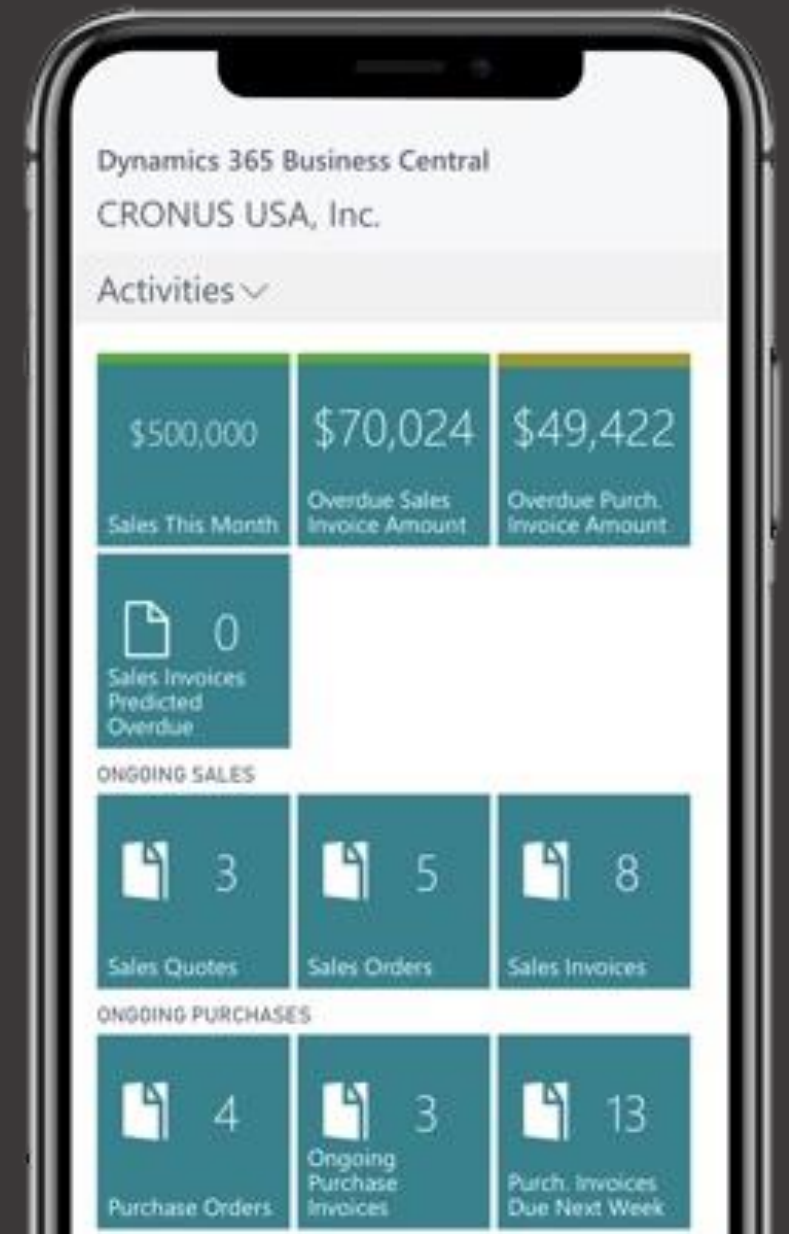
☐ Default Deferral Template

☐ Coupled to Dynamics 36...

☐ Row Groups

40. Mobile App

- Access on the go
- Real-time Data
- User Friendly Interface
- Security



Thank you!

Any questions?

j.holland1@node4.co.uk
r.blackwell@node4.co.uk

Please rate all sessions

let us know how we did

