25

40 Tips in 40 Minutes!

Microsoft Dynamics 365
Business Central

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03 Customisation

04 Data Entry

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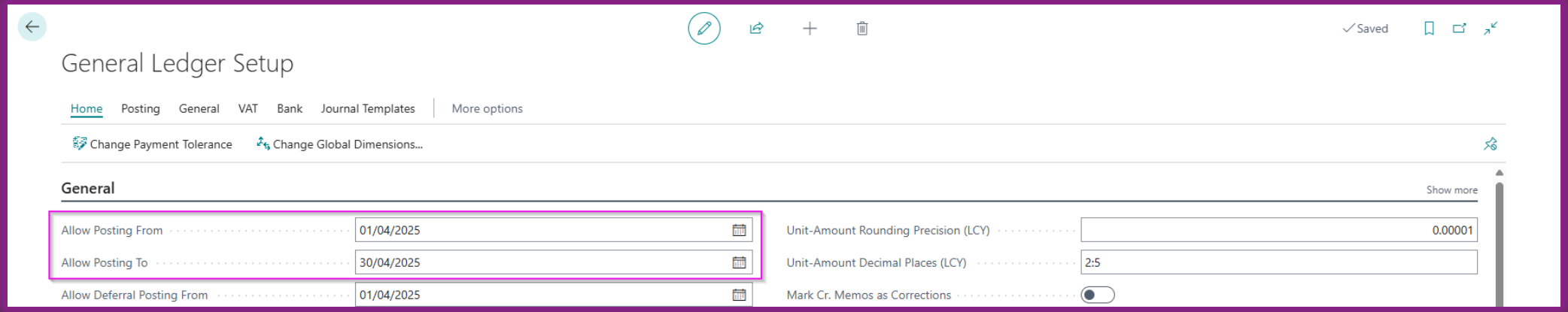
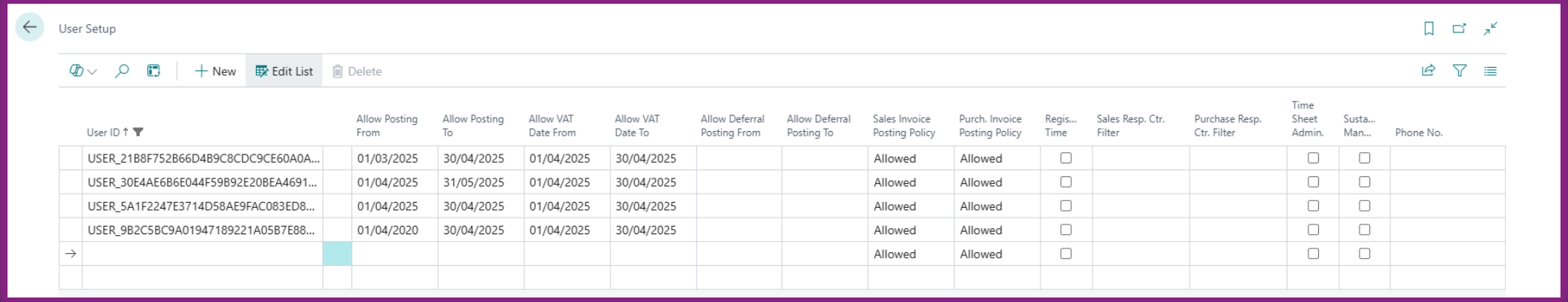
Setup Tips

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

1. Posting Dates



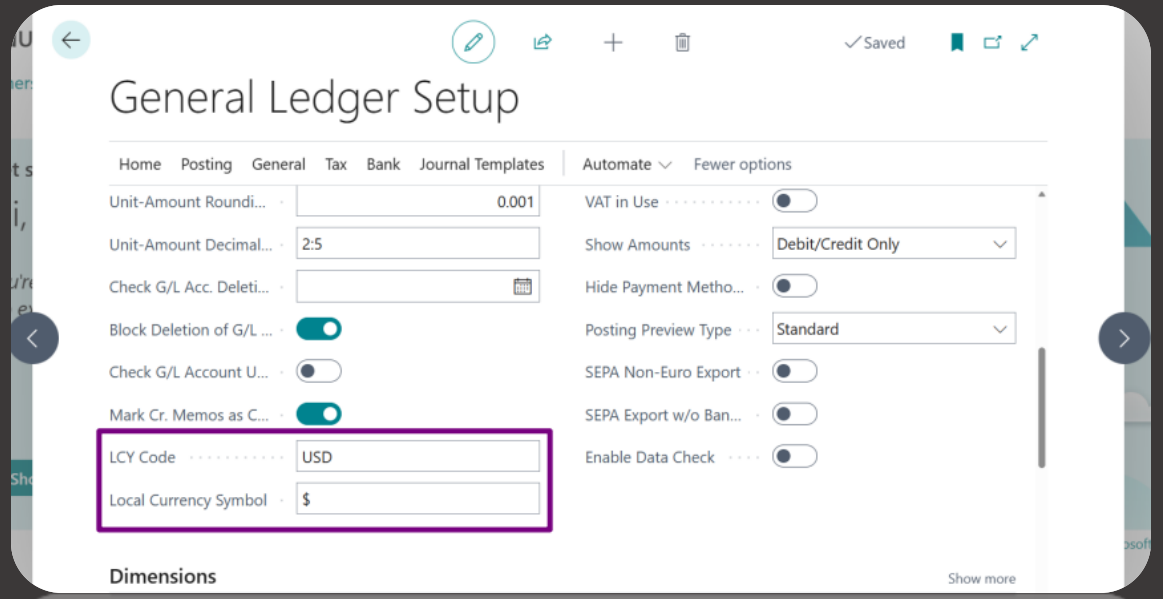
Use User Setup to control and override 'Allowed Posting Dates' from General Ledger Setup

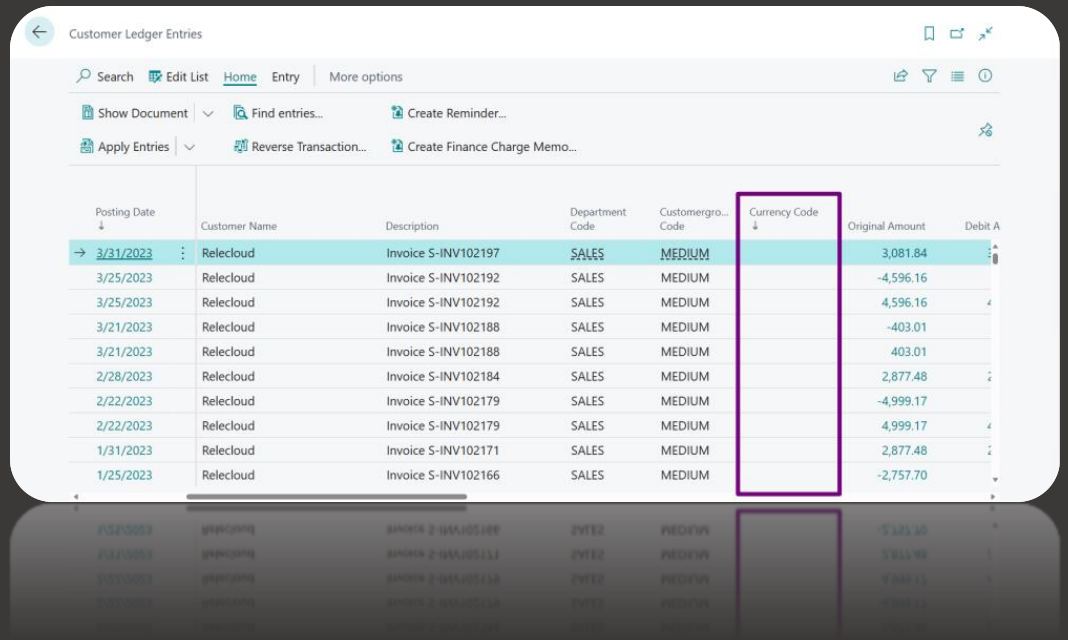


User ID	Allow Posting From	Allow Posting To	Allow VAT Date From	Allow VAT Date To	Allow Deferral Posting From	Allow Deferral Posting To	Sales Invoice Posting Policy	Purch. Invoice Posting Policy	Regis... Time	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Time Sheet Admin.	Susta... Man...	Phone No.
USER_21B8F752B66D4B9C8CDC9CE60A0A...	01/03/2025	30/04/2025	01/04/2025	30/04/2025			Allowed	Allowed	☐			☐	☐	
USER_30E4AE6B6E044F59B92E20BEA4691...	01/04/2025	31/05/2025	01/04/2025	30/04/2025			Allowed	Allowed	☐			☐	☐	
USER_5A1F2247E3714D58AE9FAC083ED8...	01/04/2025	30/04/2025	01/04/2025	30/04/2025			Allowed	Allowed	☐			☐	☐	
USER_9B2C5BC9A01947189221A05B7E88...	01/04/2020	30/04/2025	01/04/2025	30/04/2025			Allowed	Allowed	☐			☐	☐	
→							Allowed	Allowed	☐			☐	☐	

2. Local Currency

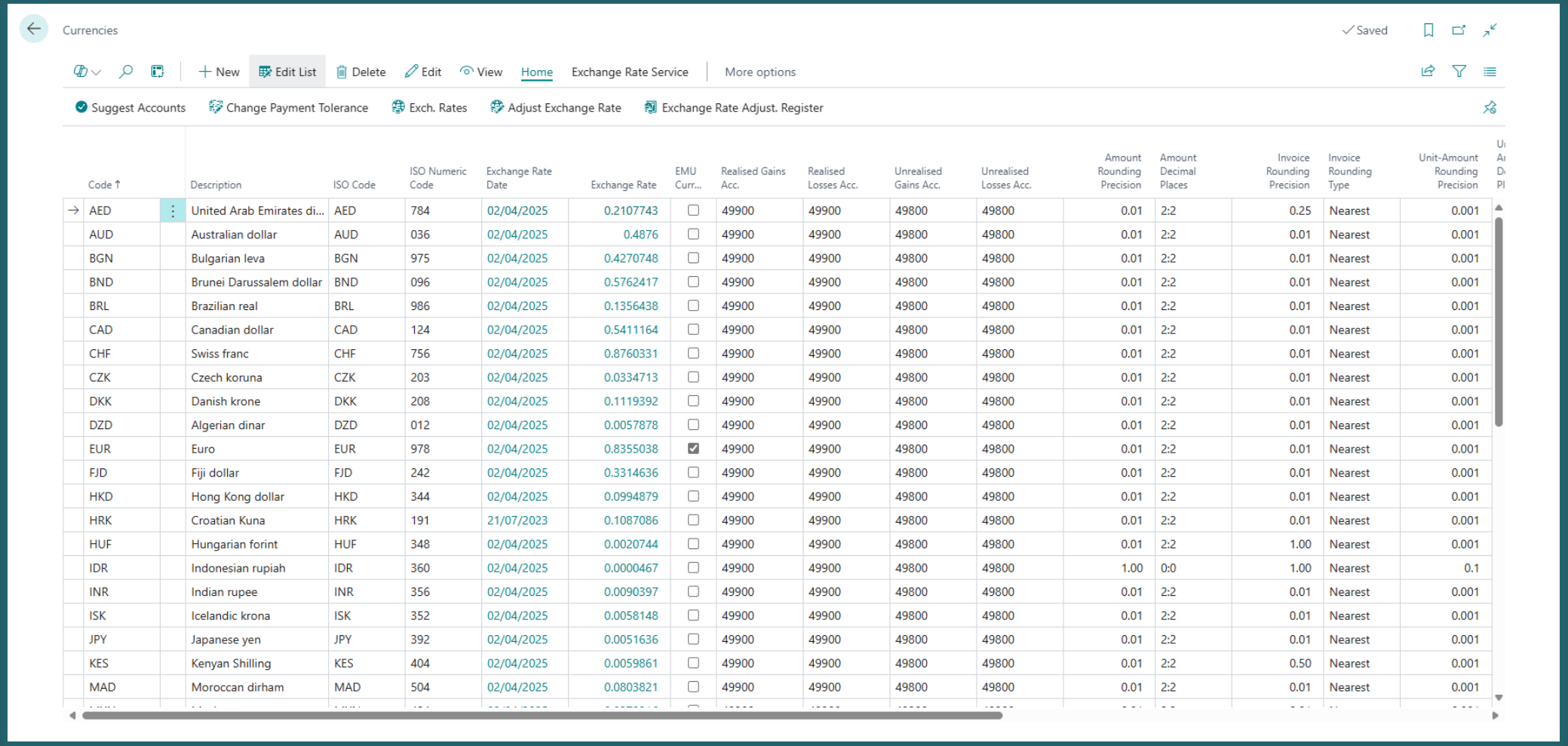
Set up a Local Currency (LCY) in the General Ledger Setup





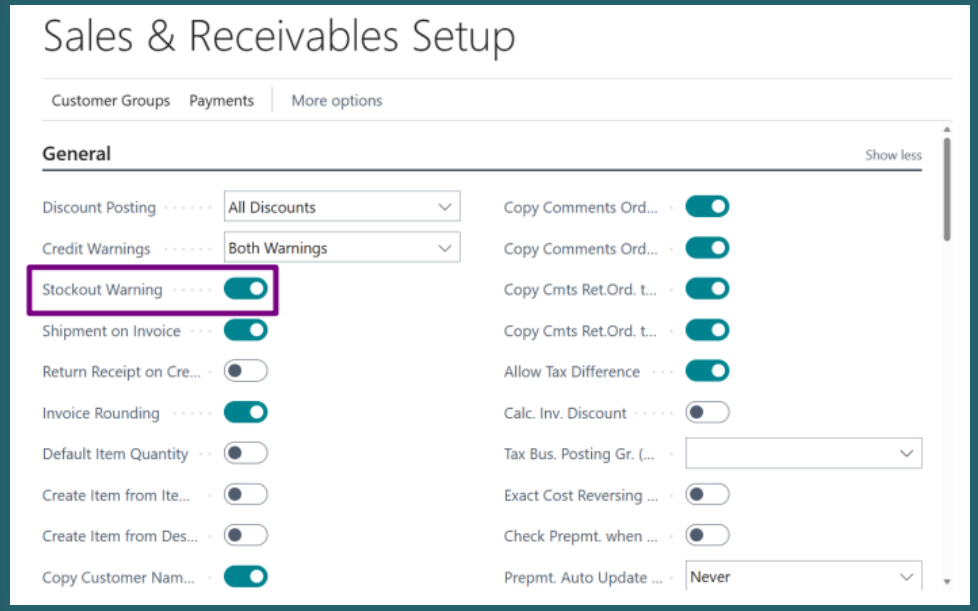
If your Currency Code is blank in your ledger entries, it's LCY!

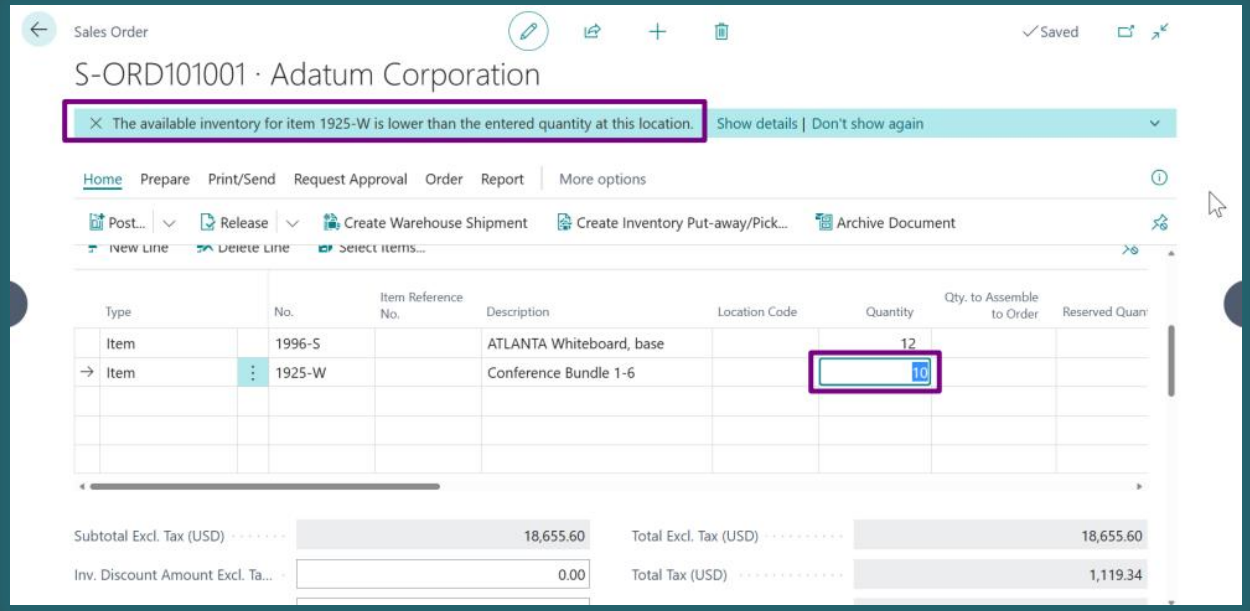
3. Exchange Rate *Service*



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
AED	United Arab Emirates di...	AED	784	02/04/2025	0.2107743	☐	49900	49900	49800	49800	0.01	2:2	0.25	Nearest	0.001
AUD	Australian dollar	AUD	036	02/04/2025	0.4876	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
BGN	Bulgarian leva	BGN	975	02/04/2025	0.4270748	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
BND	Brunei Darussalem dollar	BND	096	02/04/2025	0.5762417	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
BRL	Brazilian real	BRL	986	02/04/2025	0.1356438	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
CAD	Canadian dollar	CAD	124	02/04/2025	0.5411164	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
CHF	Swiss franc	CHF	756	02/04/2025	0.8760331	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
CZK	Czech koruna	CZK	203	02/04/2025	0.0334713	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
DKK	Danish krone	DKK	208	02/04/2025	0.1119392	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
DZD	Algerian dinar	DZD	012	02/04/2025	0.0057878	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
EUR	Euro	EUR	978	02/04/2025	0.8355038	☑	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
FJD	Fiji dollar	FJD	242	02/04/2025	0.3314636	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
HKD	Hong Kong dollar	HKD	344	02/04/2025	0.0994879	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
HRK	Croatian Kuna	HRK	191	21/07/2023	0.1087086	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
HUF	Hungarian forint	HUF	348	02/04/2025	0.0020744	☐	49900	49900	49800	49800	0.01	2:2	1.00	Nearest	0.001
IDR	Indonesian rupiah	IDR	360	02/04/2025	0.0000467	☐	49900	49900	49800	49800	1.00	0:0	1.00	Nearest	0.1
INR	Indian rupee	INR	356	02/04/2025	0.0090397	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
ISK	Icelandic krona	ISK	352	02/04/2025	0.0058148	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
JPY	Japanese yen	JPY	392	02/04/2025	0.0051636	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001
KES	Kenyan Shilling	KES	404	02/04/2025	0.0059861	☐	49900	49900	49800	49800	0.01	2:2	0.50	Nearest	0.001
MAD	Moroccan dirham	MAD	504	02/04/2025	0.0803821	☐	49900	49900	49800	49800	0.01	2:2	0.01	Nearest	0.001

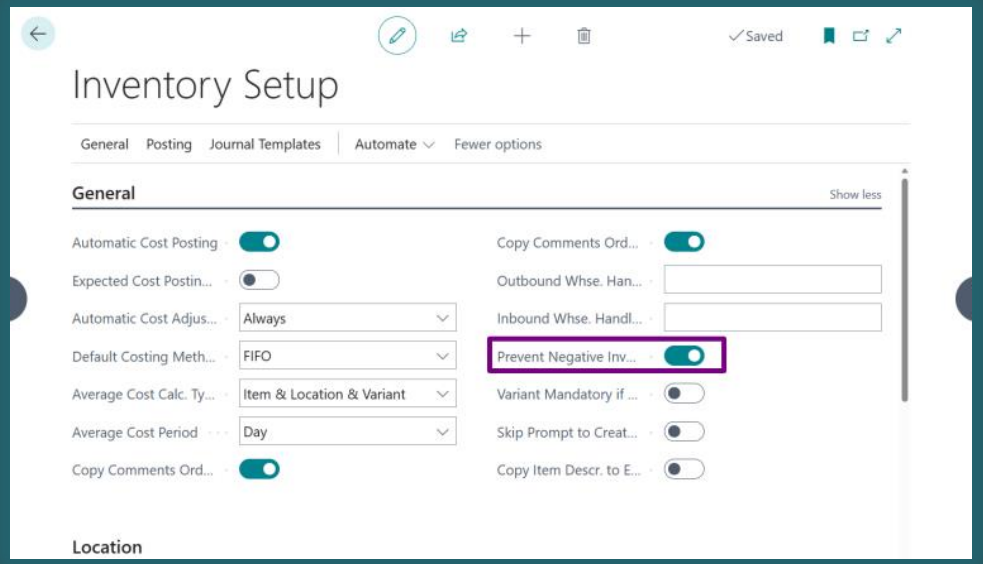
4. Stockout Warning

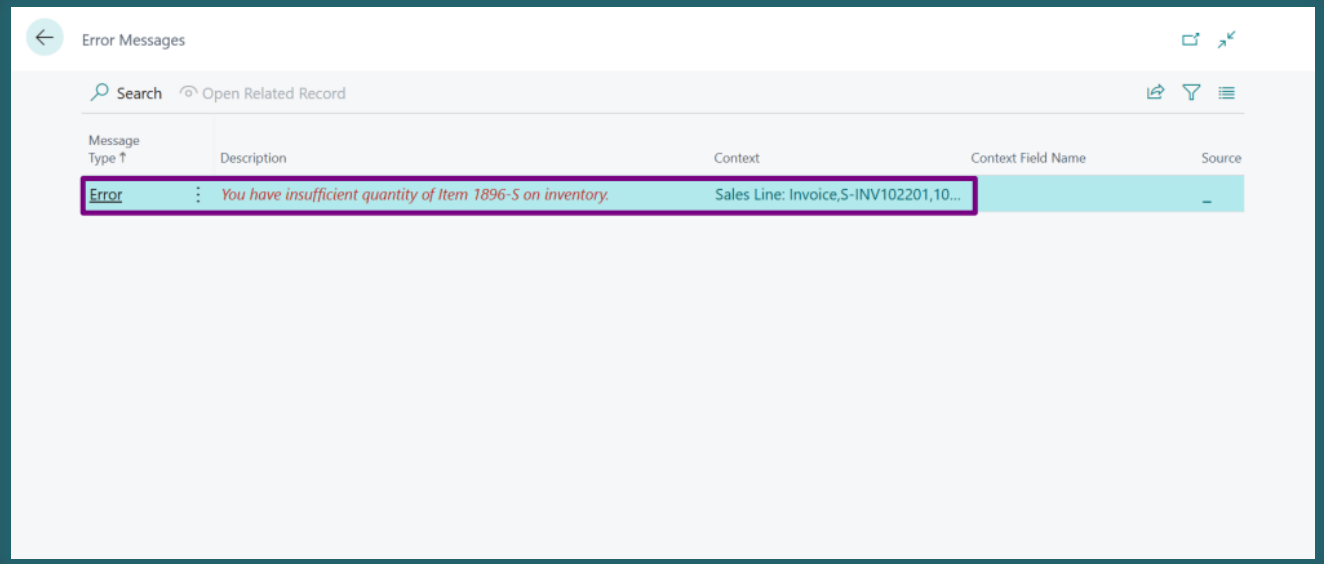




For a *warning* that you do not have enough inventory

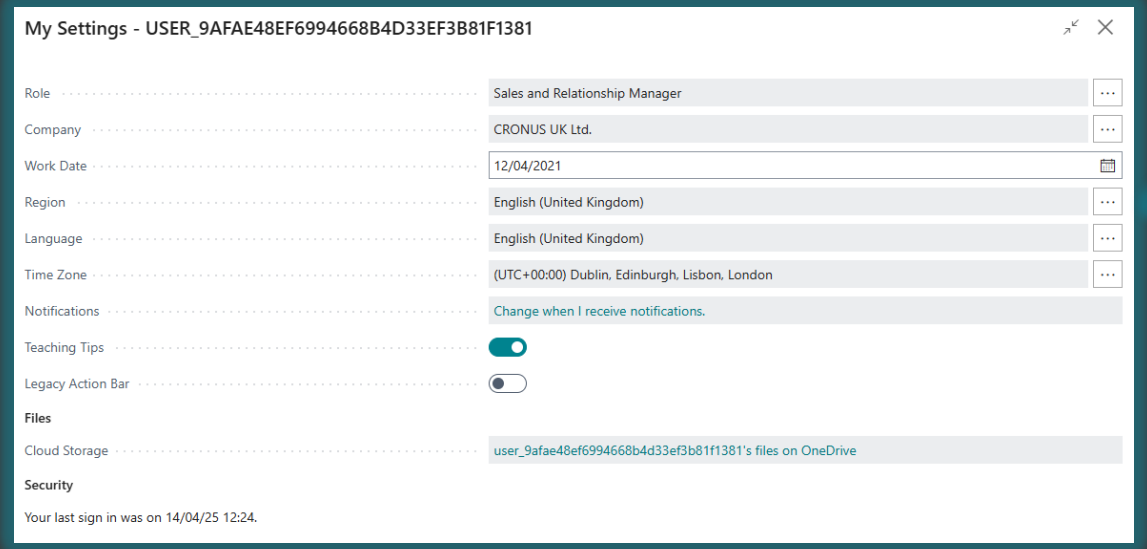
5. Prevent Negative Inventory

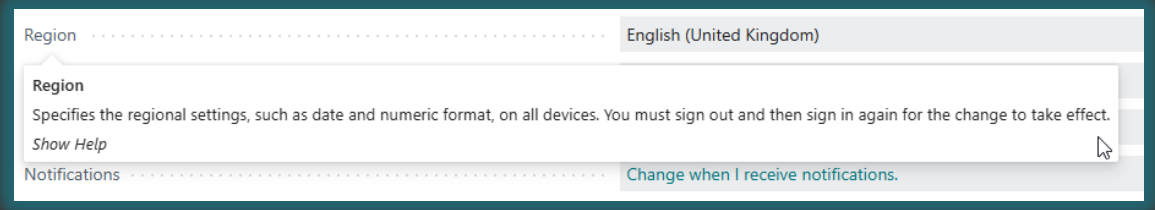


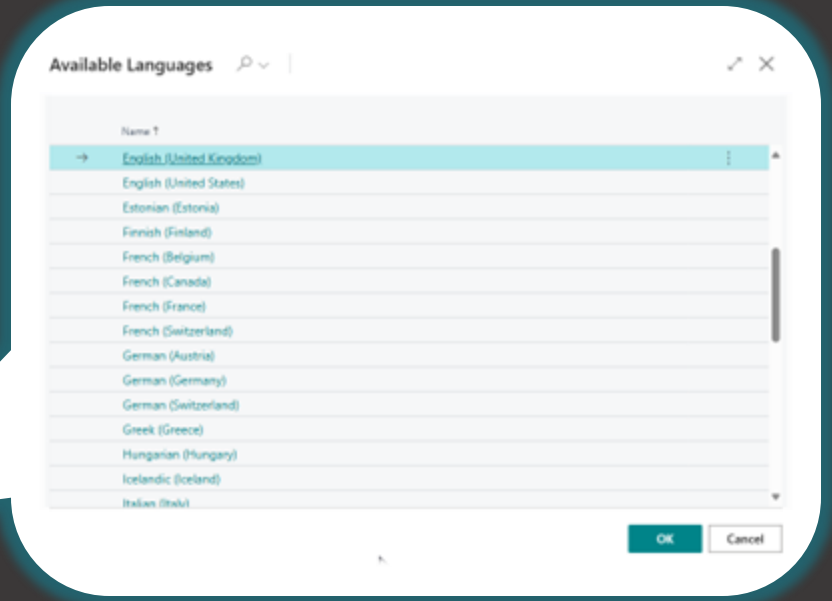


You can't say that we didn't warn you...

6. Languages and Regions





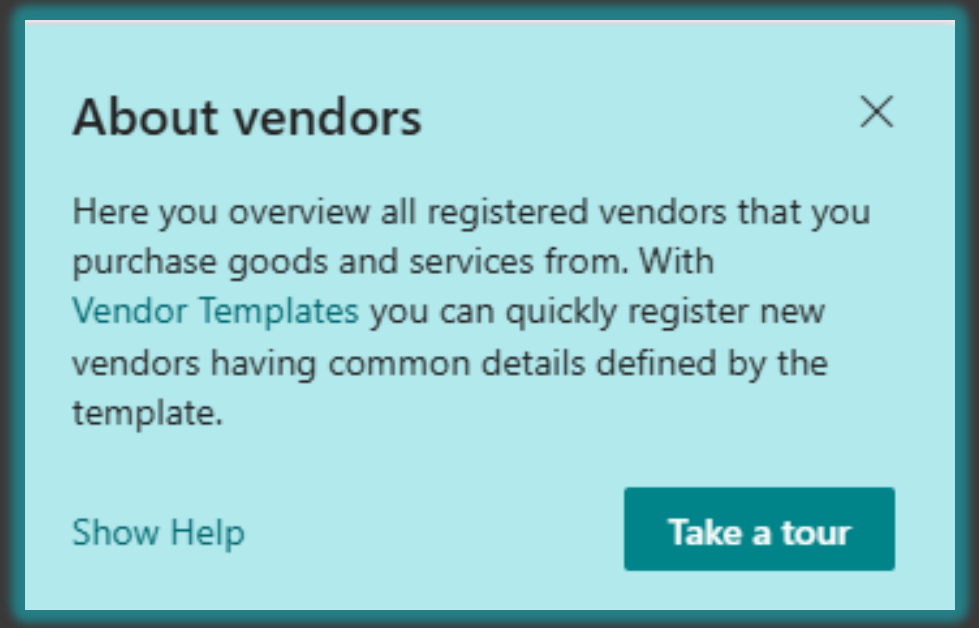


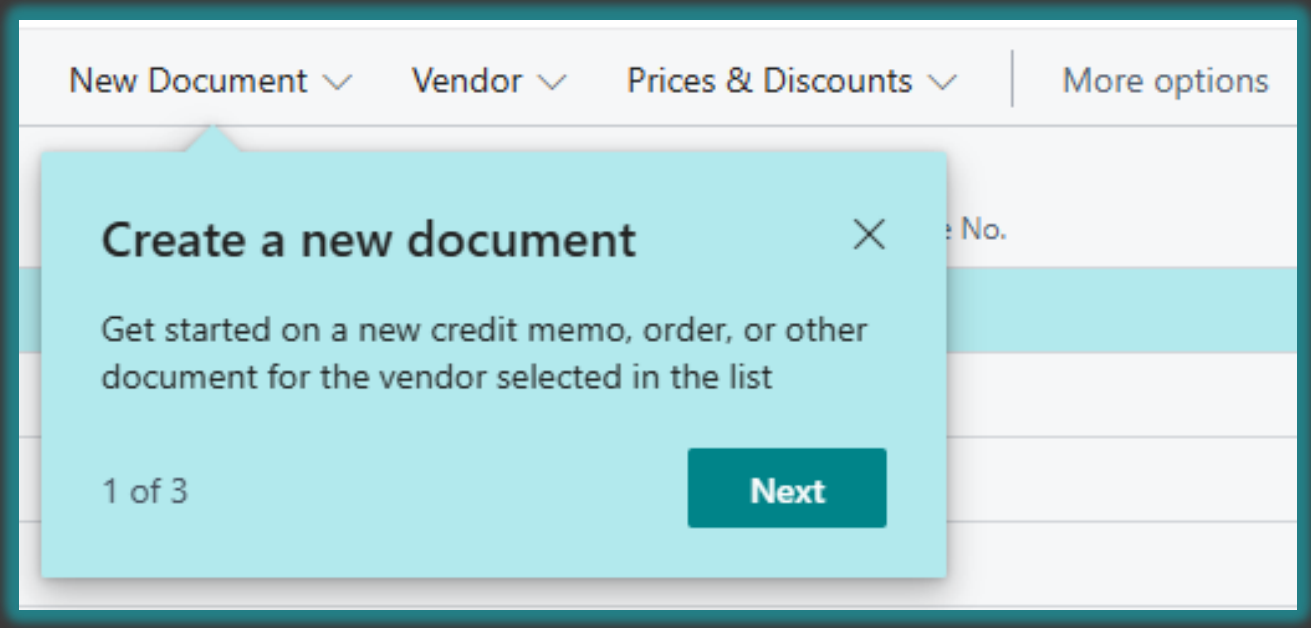
Define your Language and Region from your settings

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

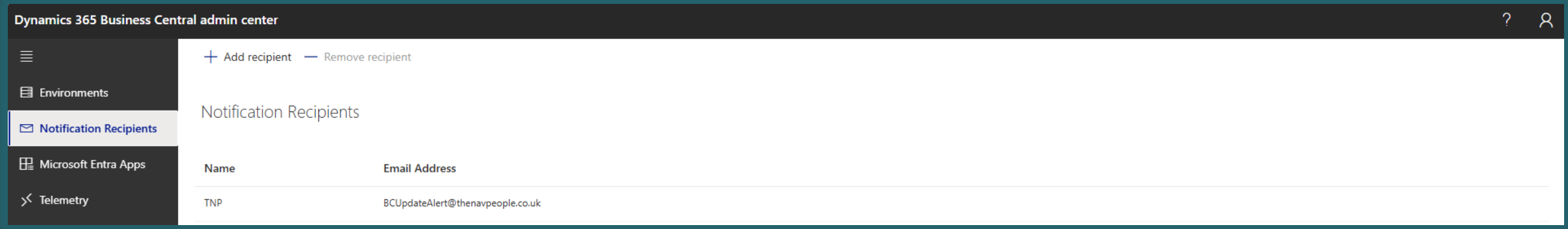
7. Teaching Tips

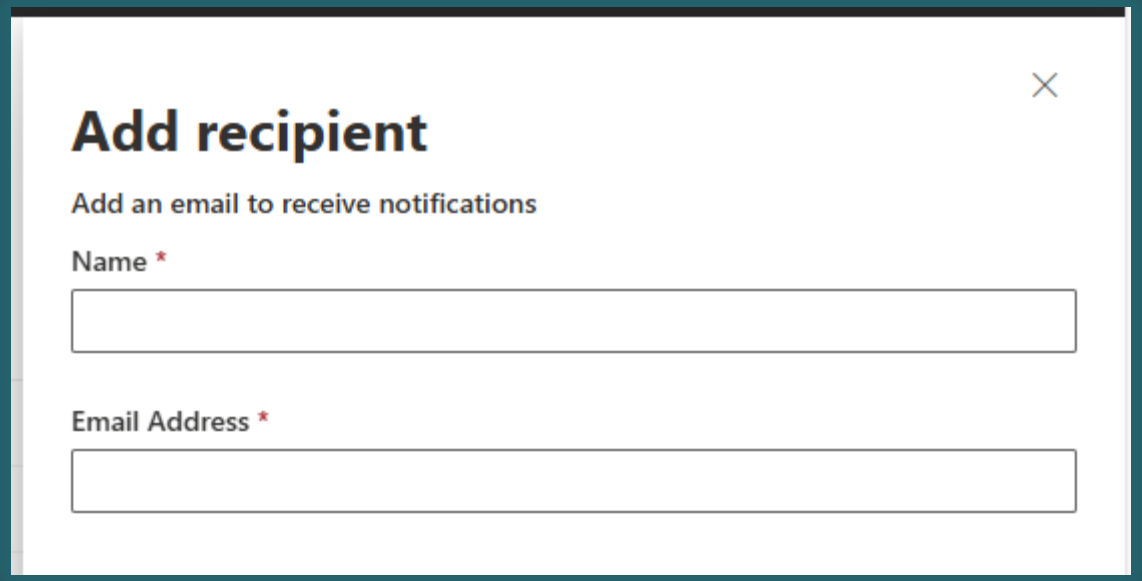
From ‘My Settings’ enable or disable teaching tips.





8. Admin Centre Notifications





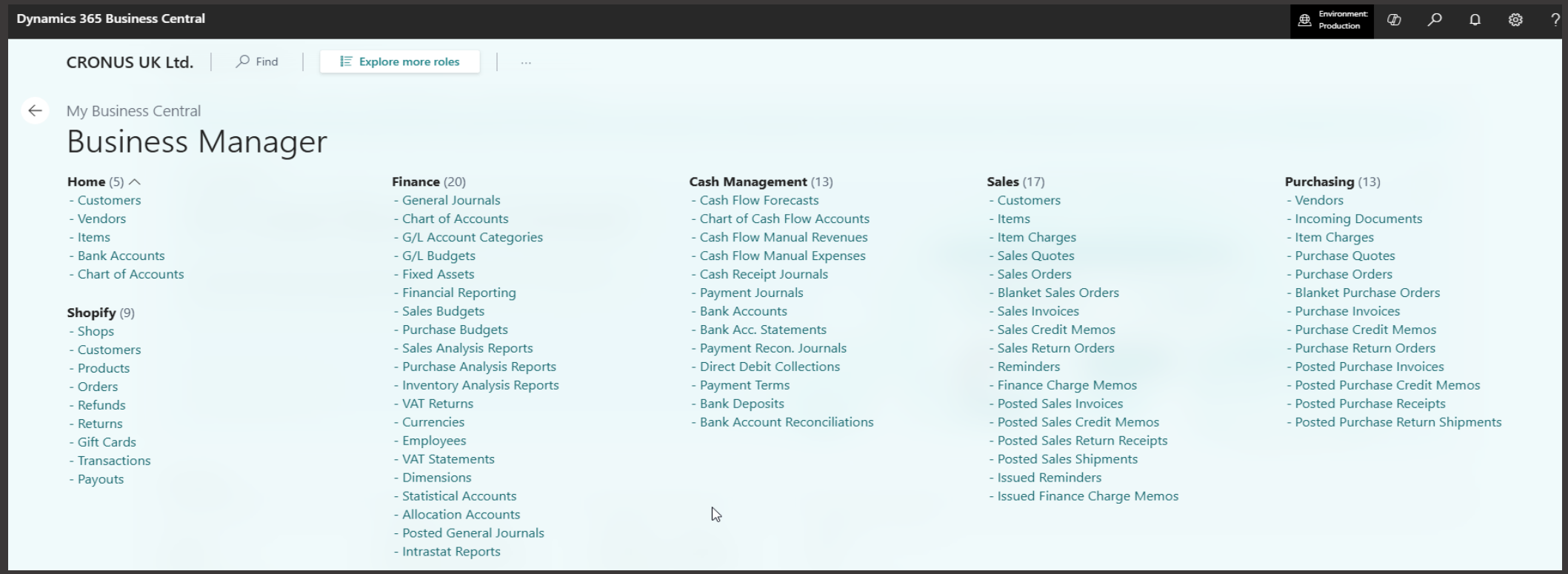
Navigation Tips

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

- Keyboard shortcuts
- Extra information
- Wildcard searches

9. Role Explorer

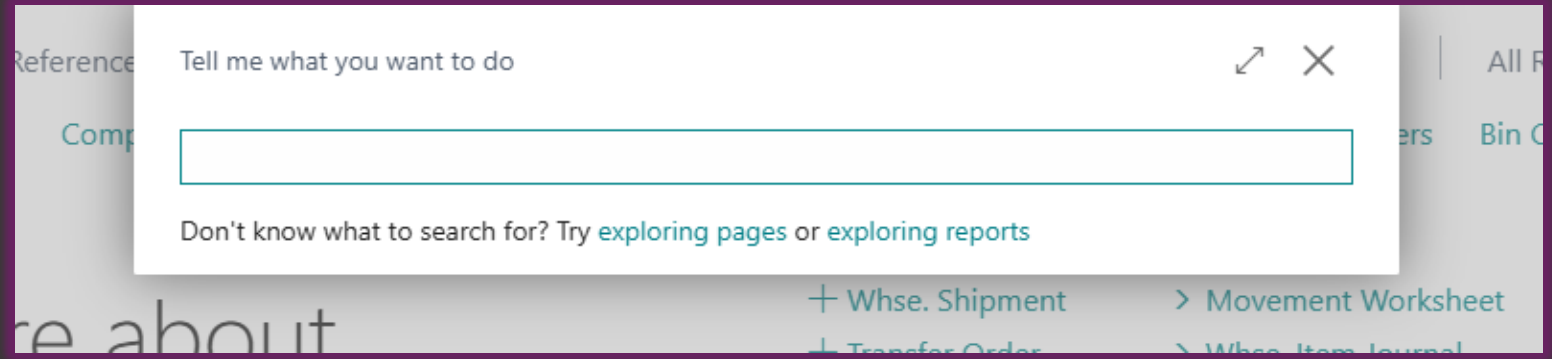
Press SHIFT+F12 for Role Explorer...

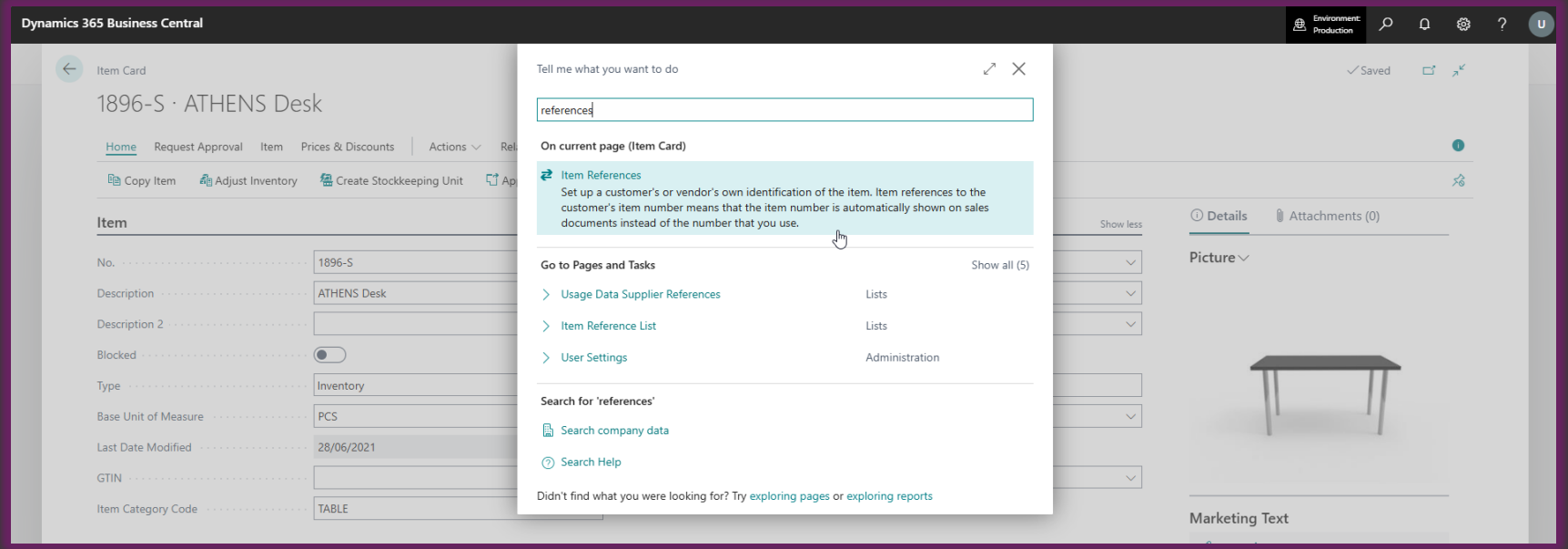


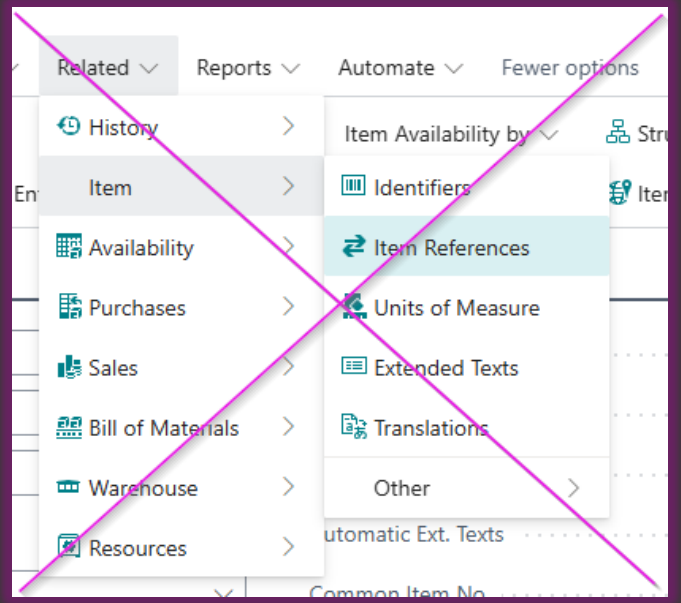
... for a hierarchical view of your personal role

10. Tell Me Feature

Keyboard shortcut – ALT+Q

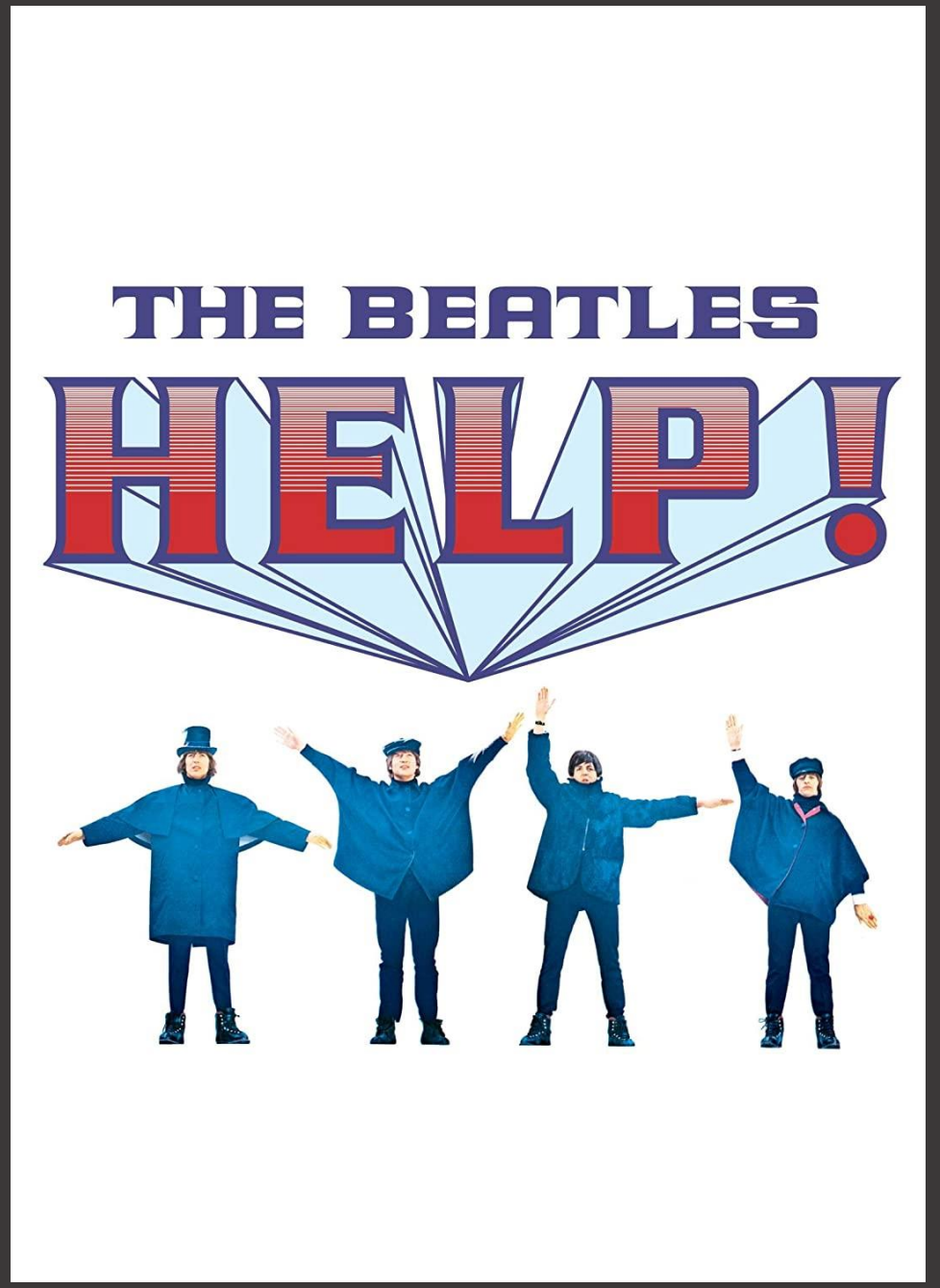






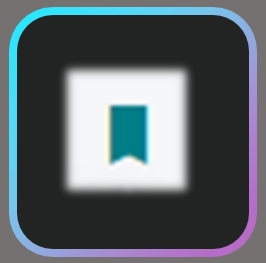
11. Help!

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



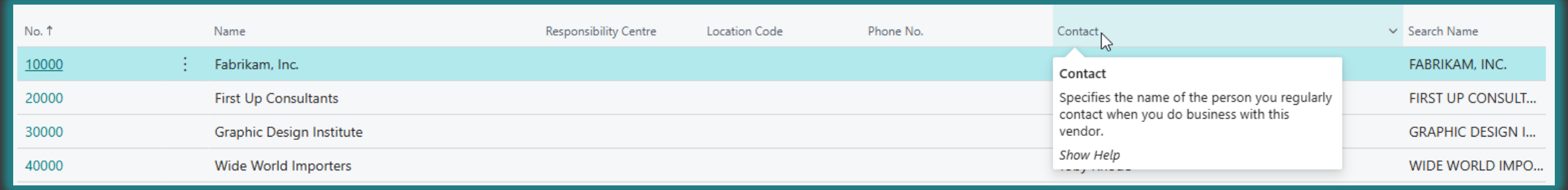
12. Bookmark Pages

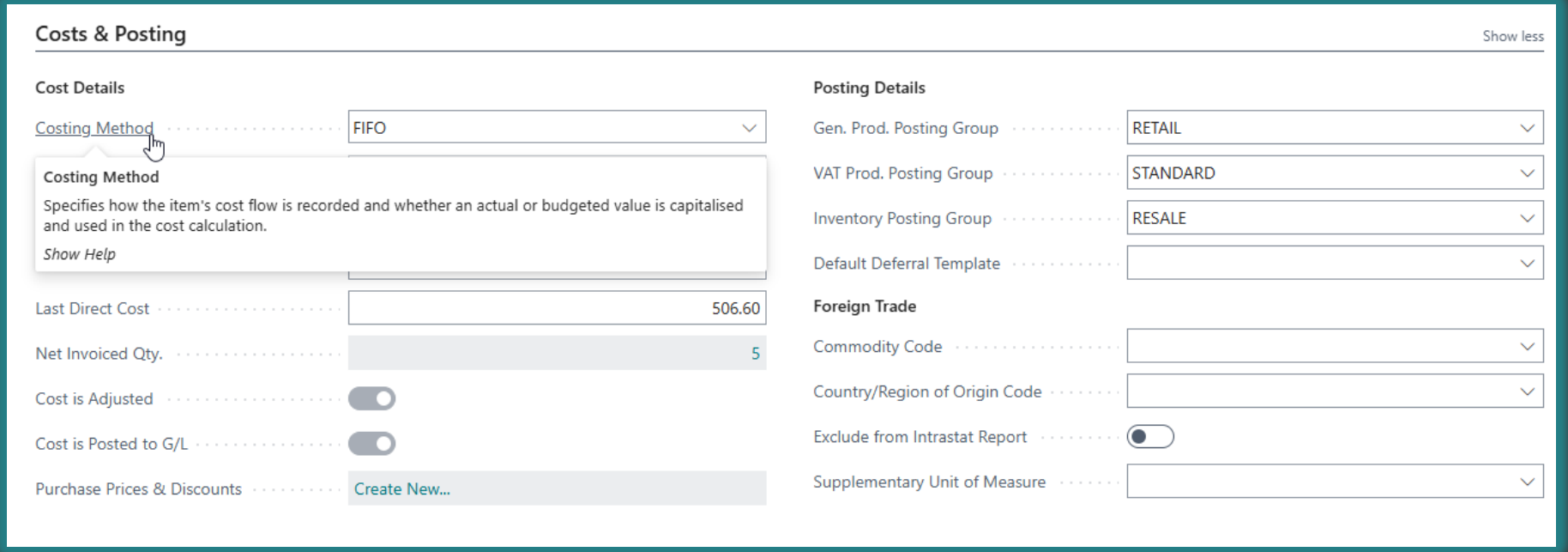
Use the bookmark icon to save frequently used pages for quick access.



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

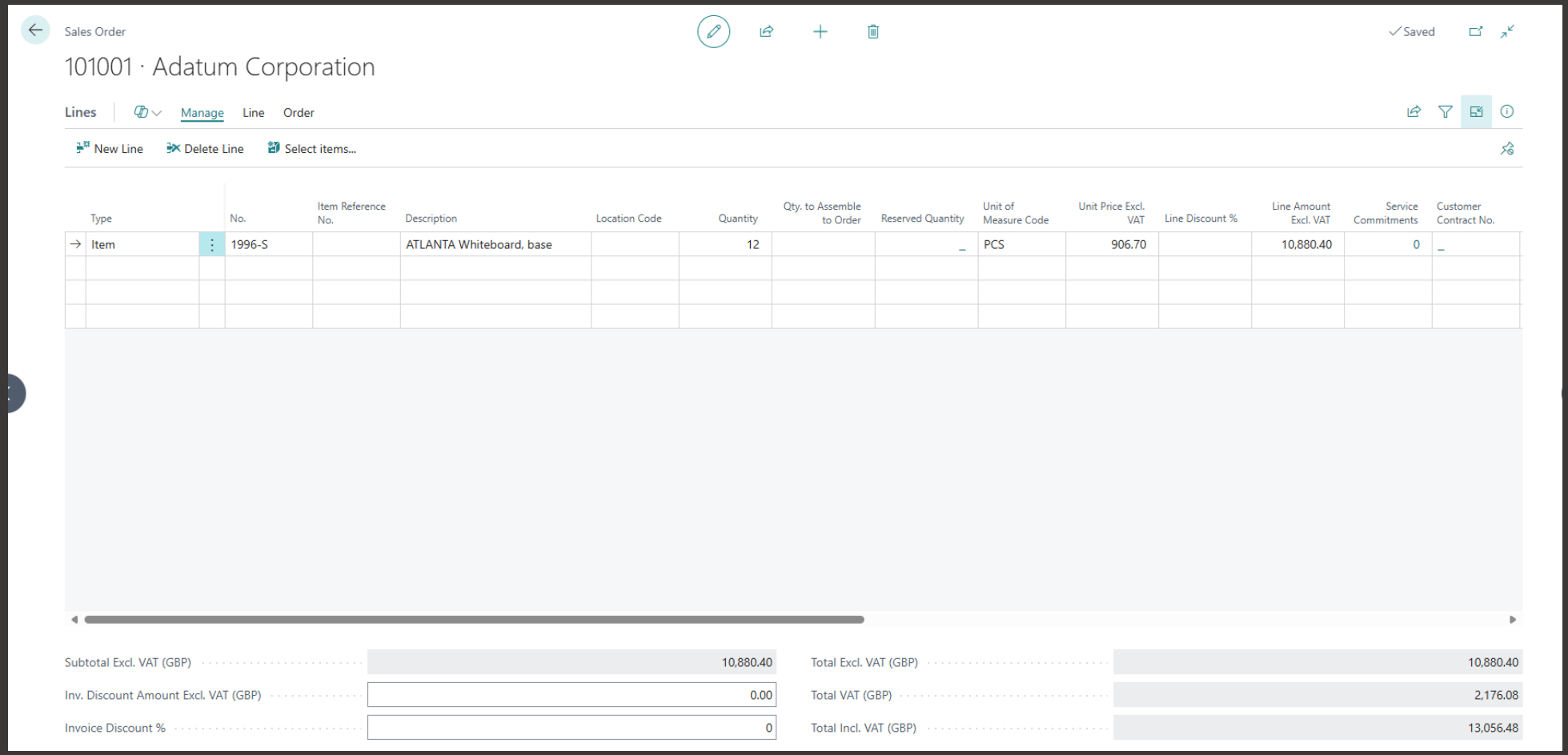
13. Tool Tips


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


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

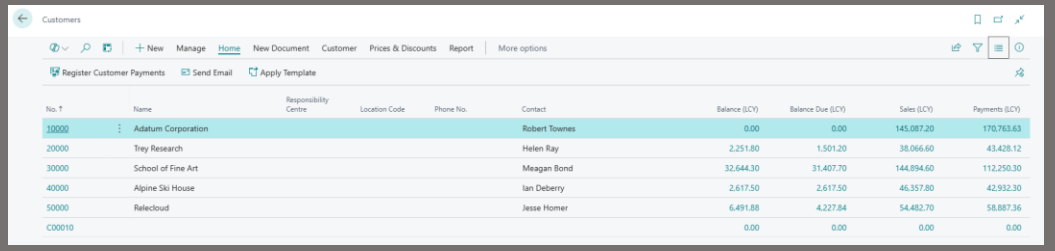
14. Focus Mode

CTRL + SHIFT + F12

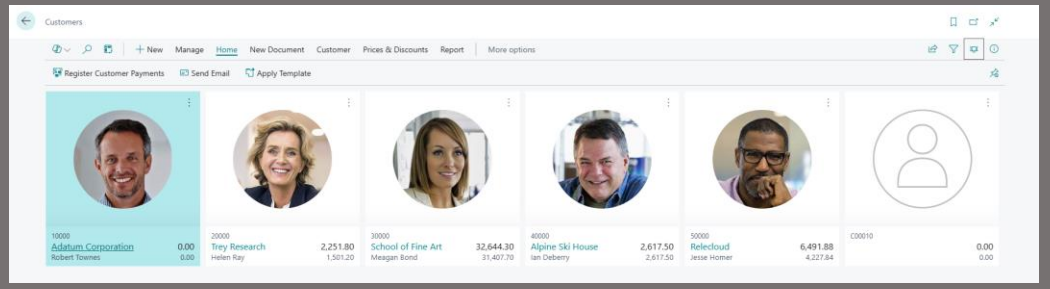


15. List Layout Options

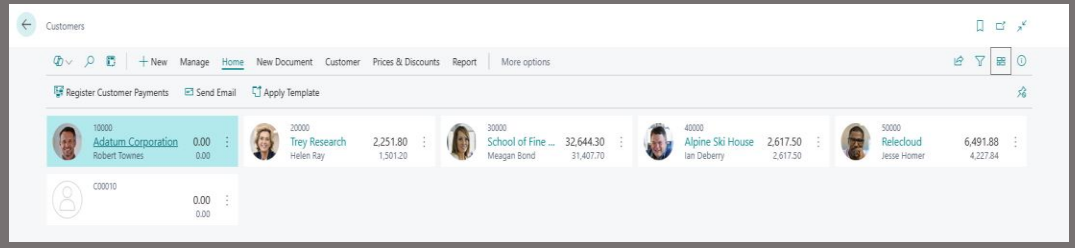
List



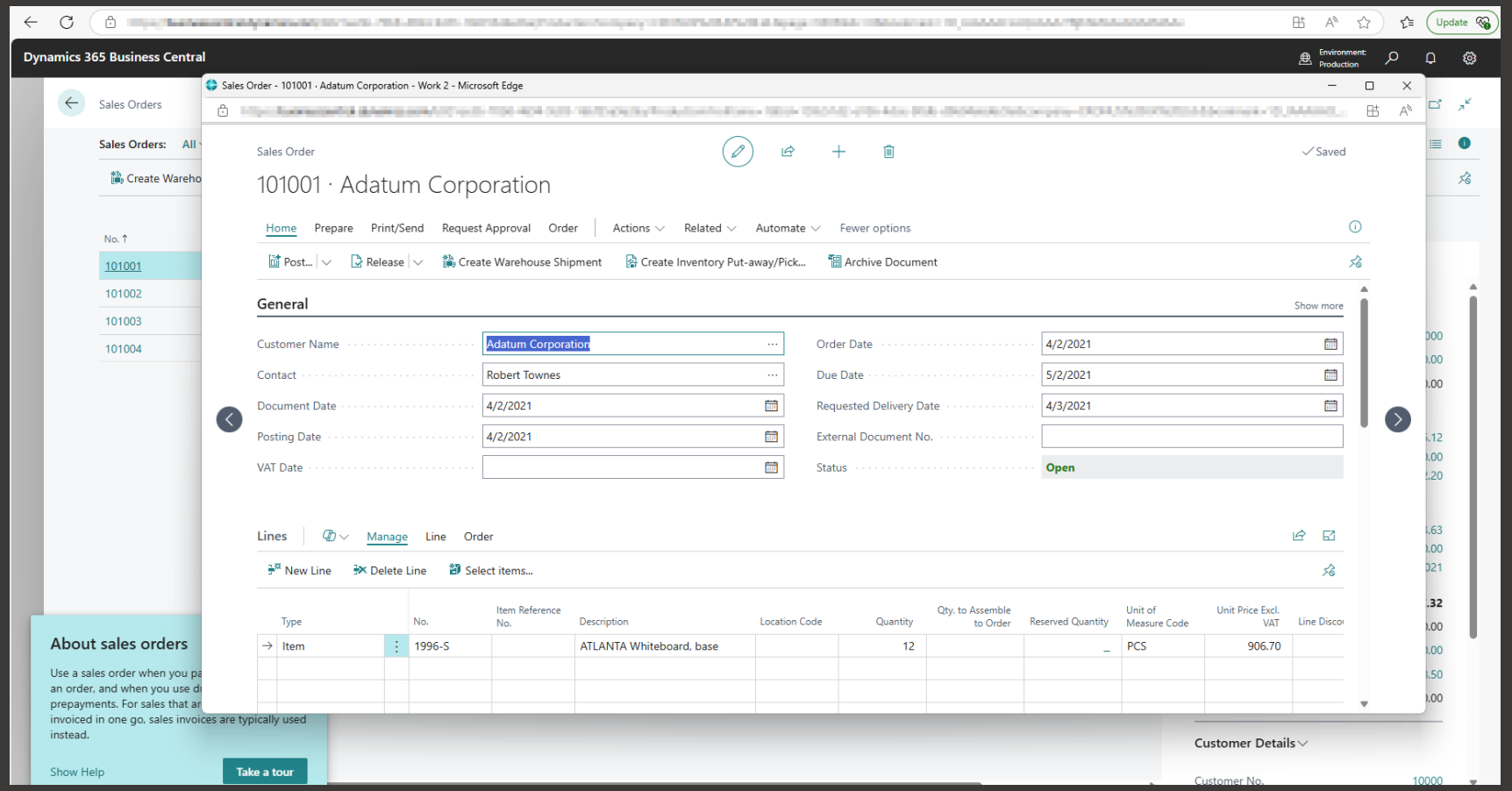
Tall Tiles



Tiles



16. Pop-Out Pages



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

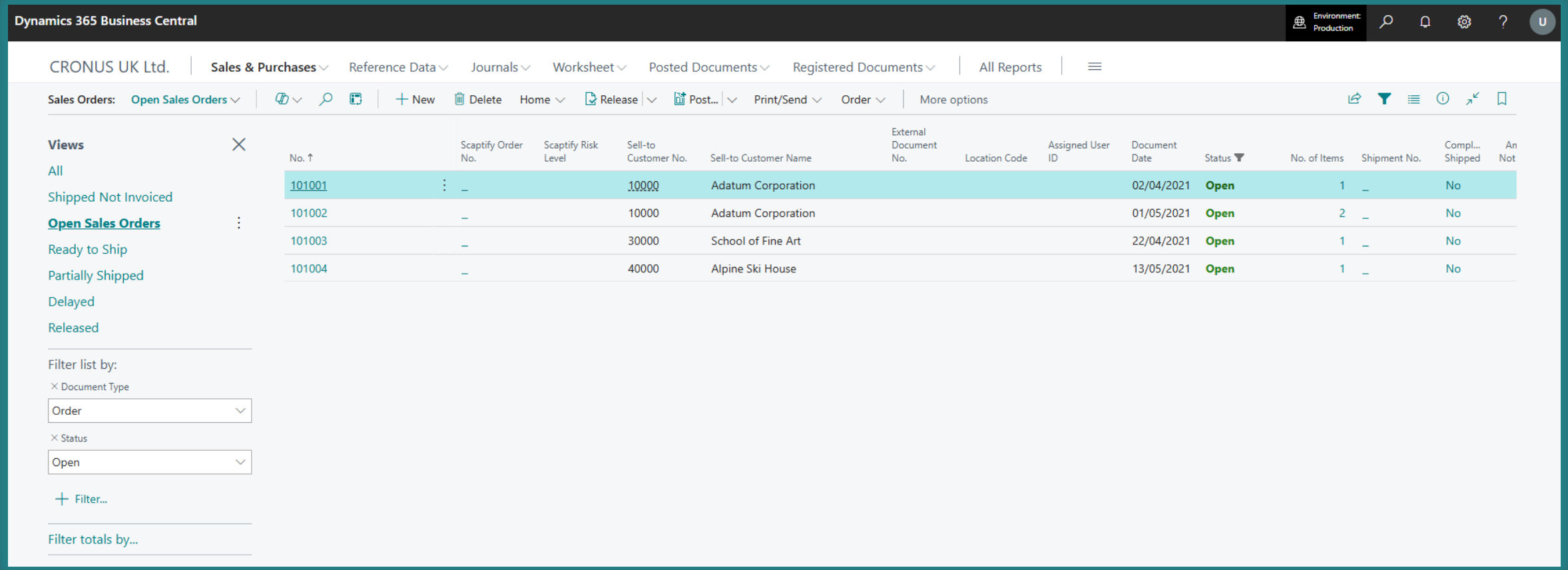
1000..2000|<>1500 the combo

* Best to avoid these special characters when naming e.g. Items or Customer No’s.

Customisation Tips

- Saving Your Filters
- Personalising Your Pages
- Custom Reports

18. Save Filters as Views



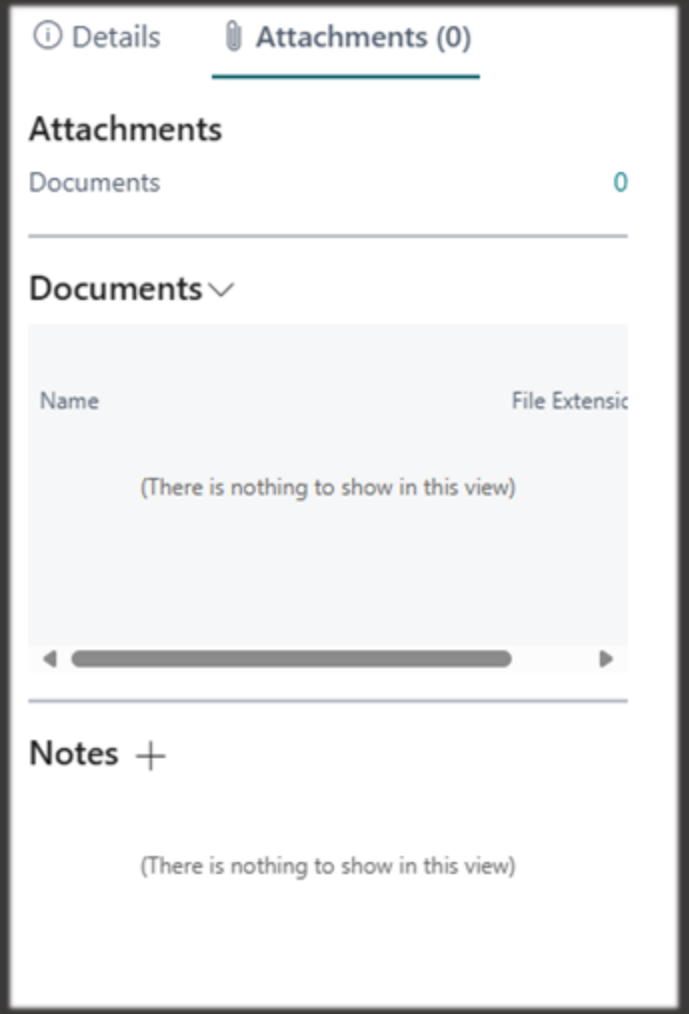
19. Notes and Attachments

Notes

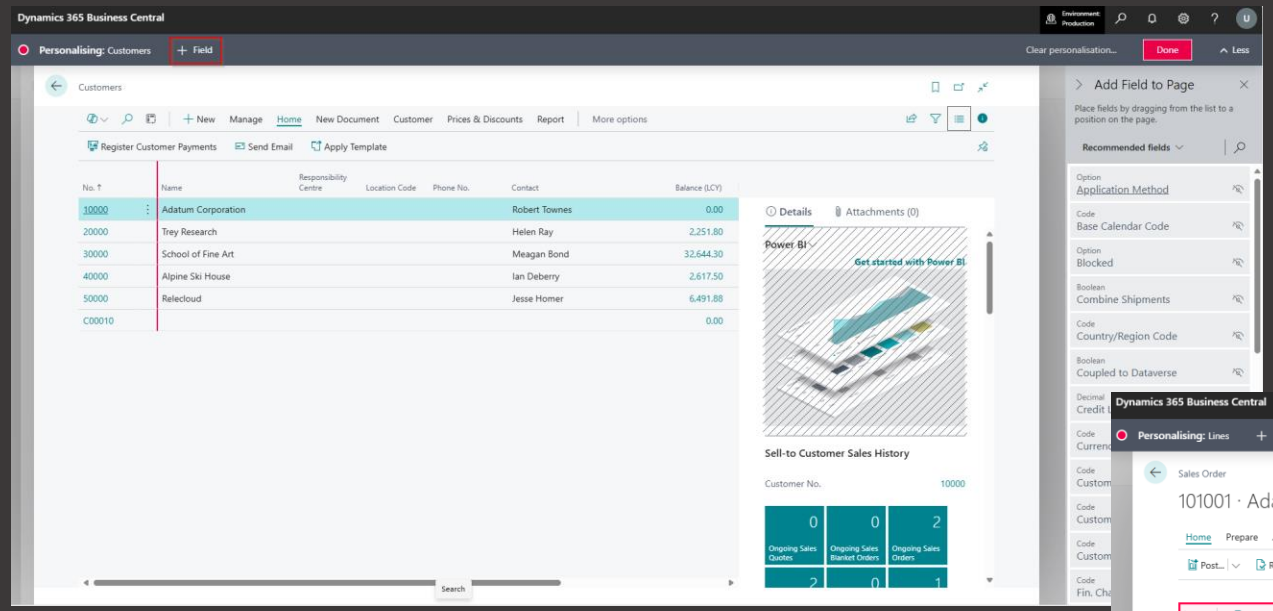
- Attach text to the notes
- Alt+O Keyboard shortcut

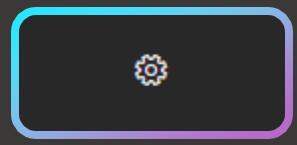
Attachments

- Word, Excel, etc.
- PDF
- Images

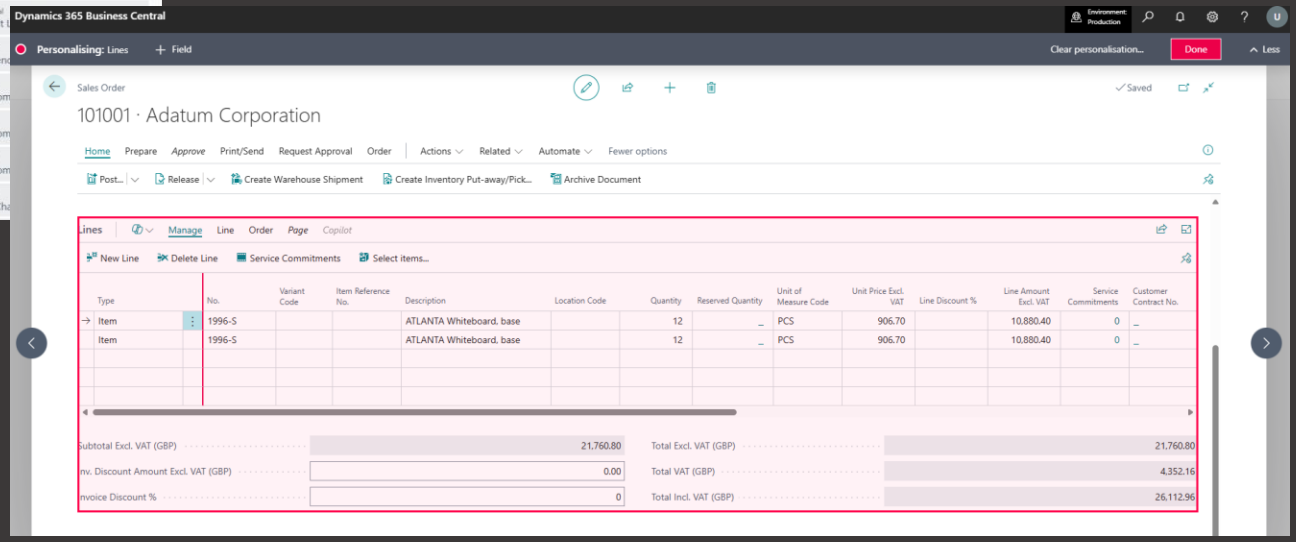


20. Personalise Your Pages





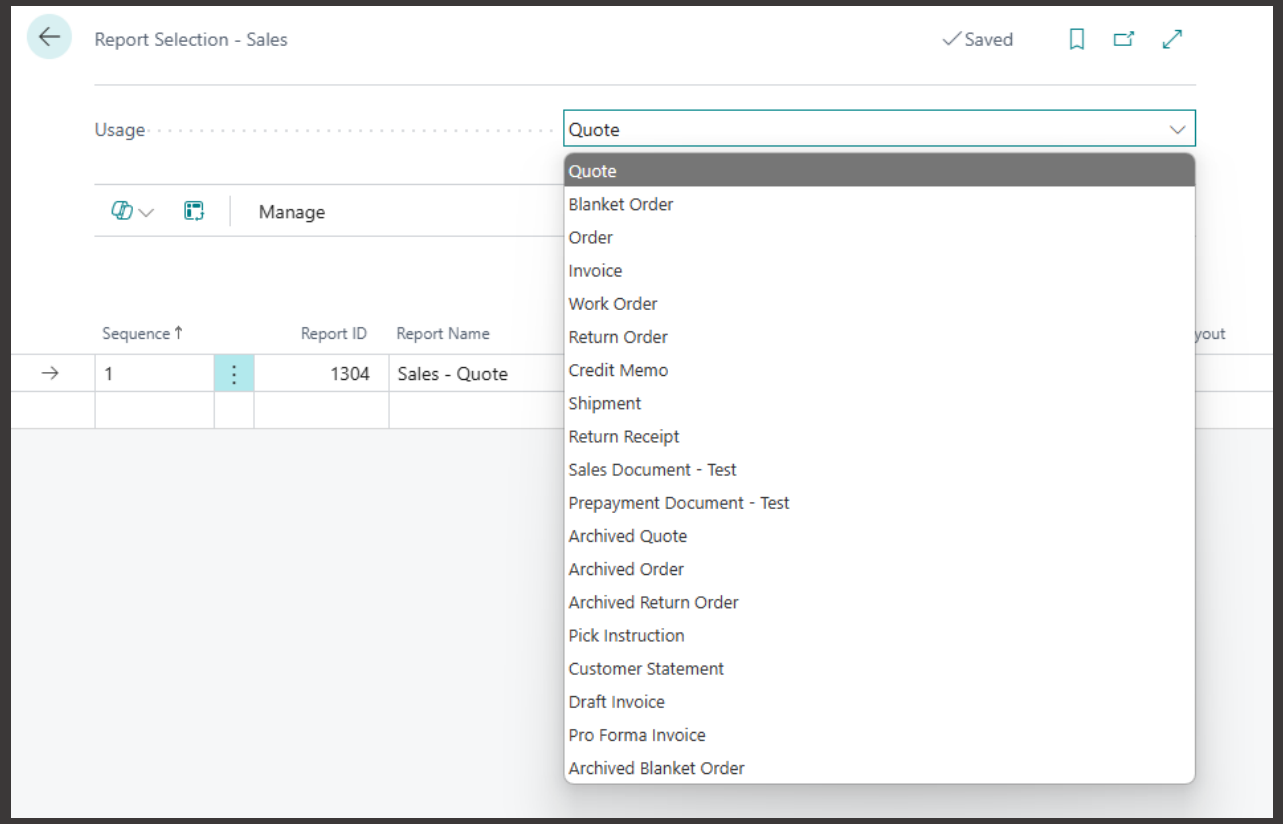
- Click on the gear/cog icon



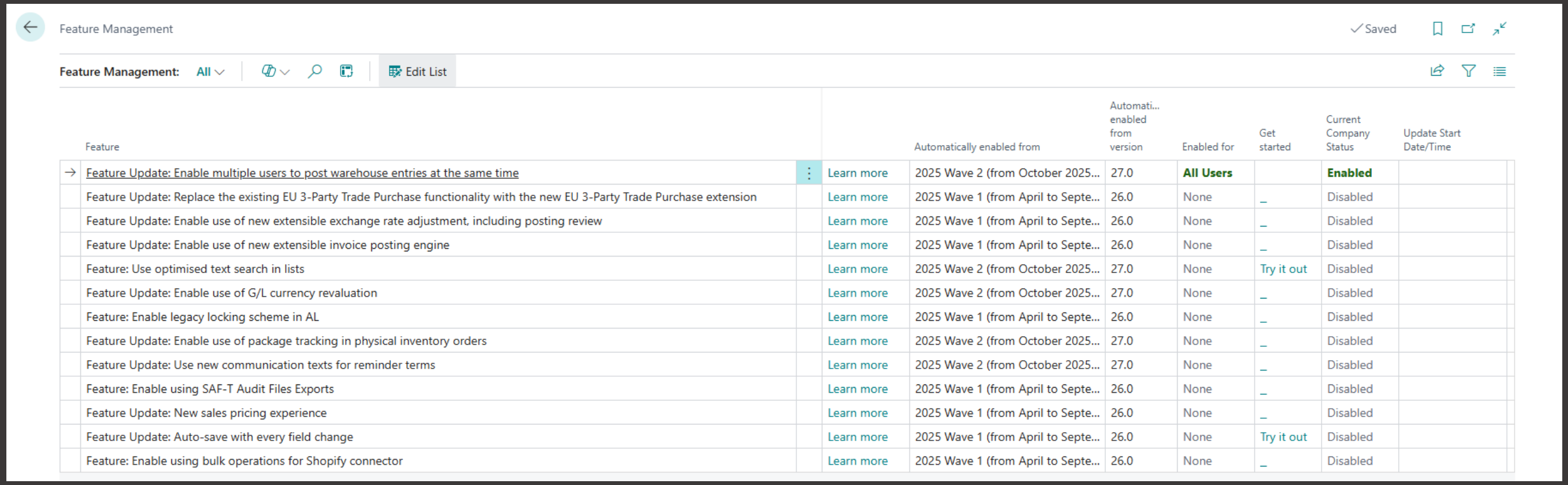
21. Customise Reports

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



22. Feature Management



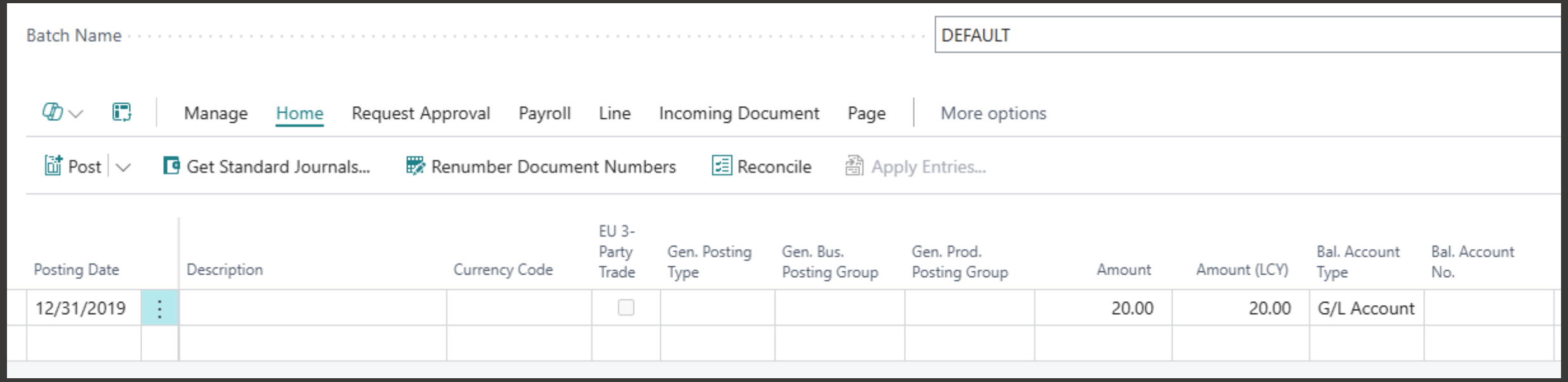
Feature		Automatically enabled from	Automati... enabled from version	Enabled for	Get started	Current Company Status	Update Start Date/Time
Feature Update: Enable multiple users to post warehouse entries at the same time	Learn more	2025 Wave 2 (from October 2025...	27.0	**All Users**		**Enabled**	
Feature 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

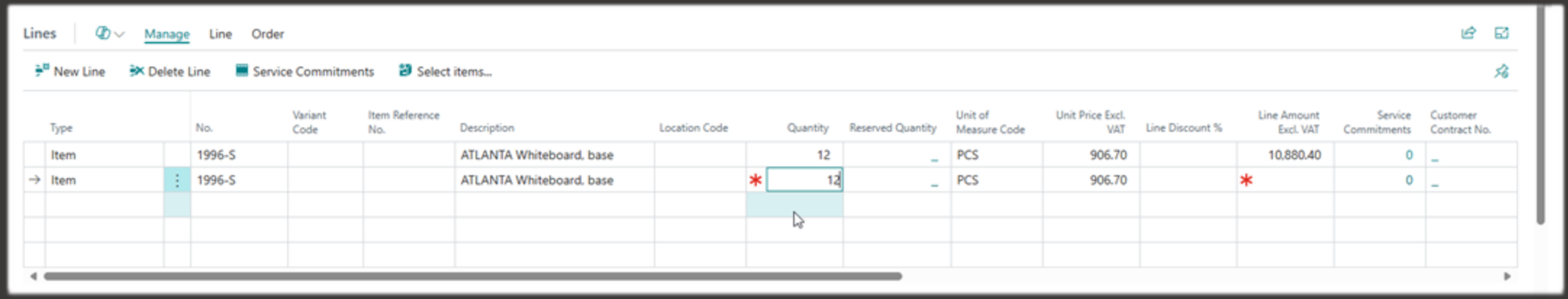
23. Excel-like Calculations

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



24. Copy Data

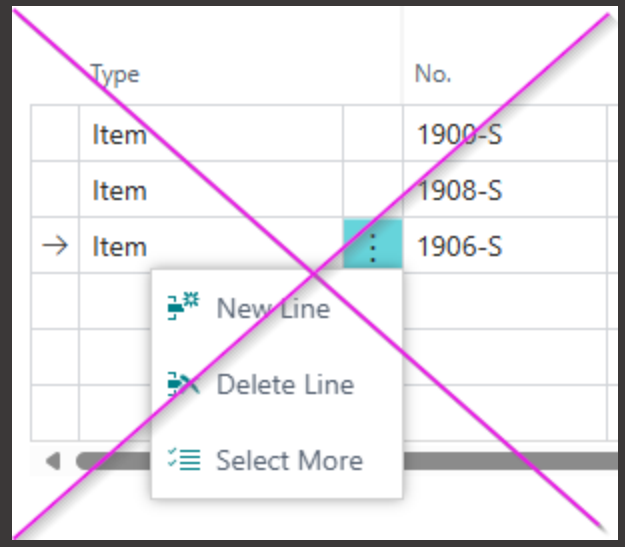
Click F8 to copy from the cell above



25. Insert & Delete Lines

CTRL + INSERT

CTRL + DELETE

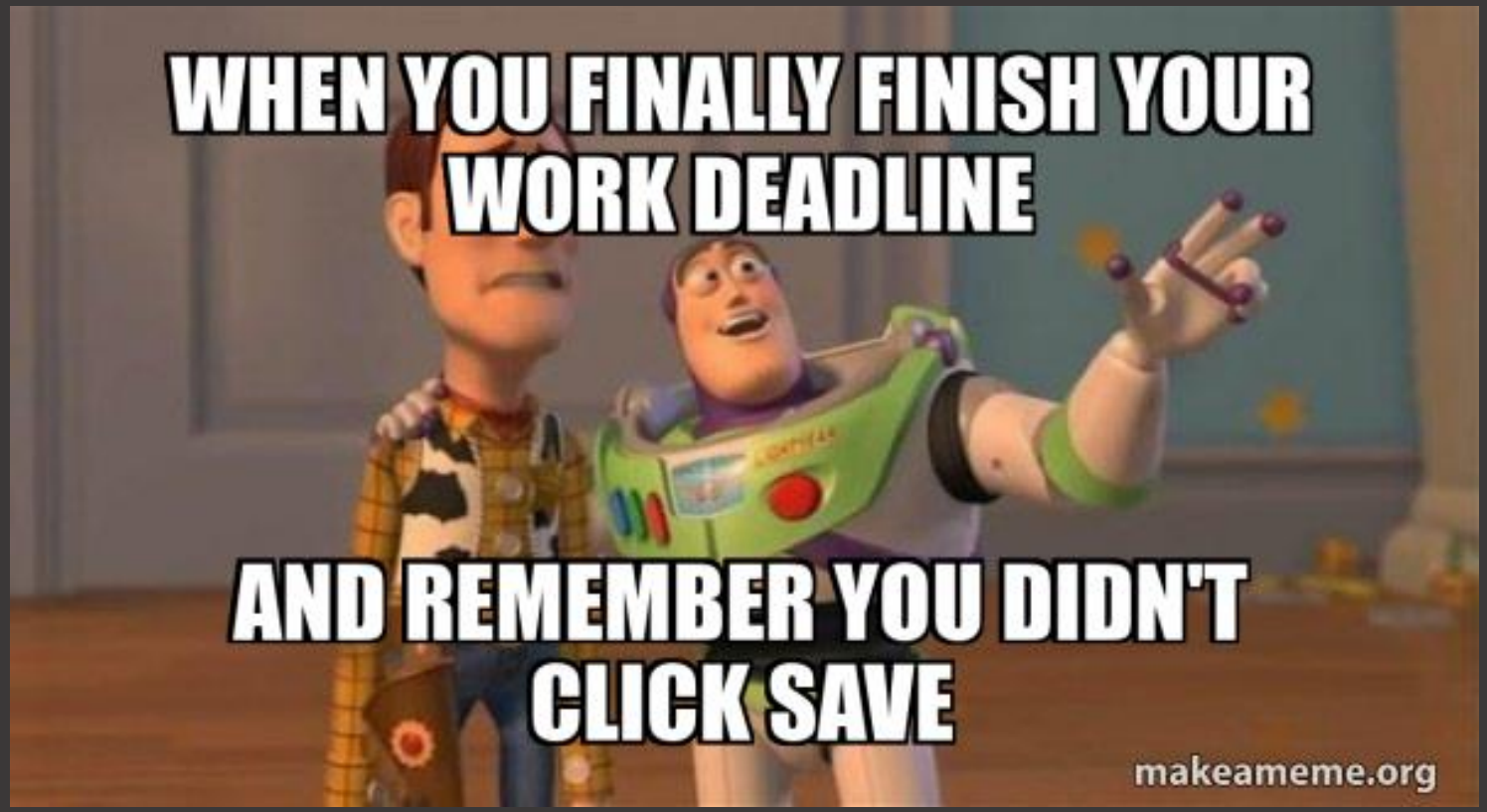


Lines | Manage | Line | Functions | Order

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 Ex
	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



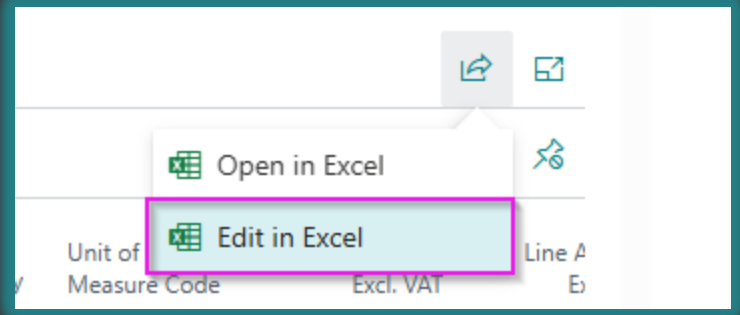
Not saved

Saving...

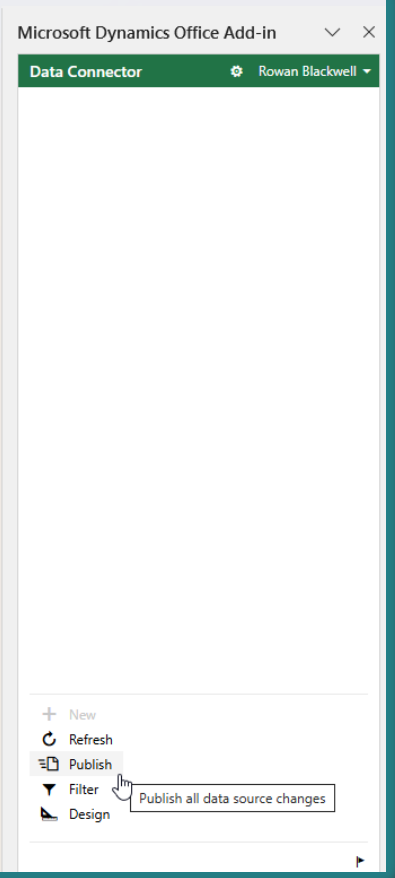
✓ Saved

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	



Troubleshooting Tips

* Things you can do before logging a support ticket

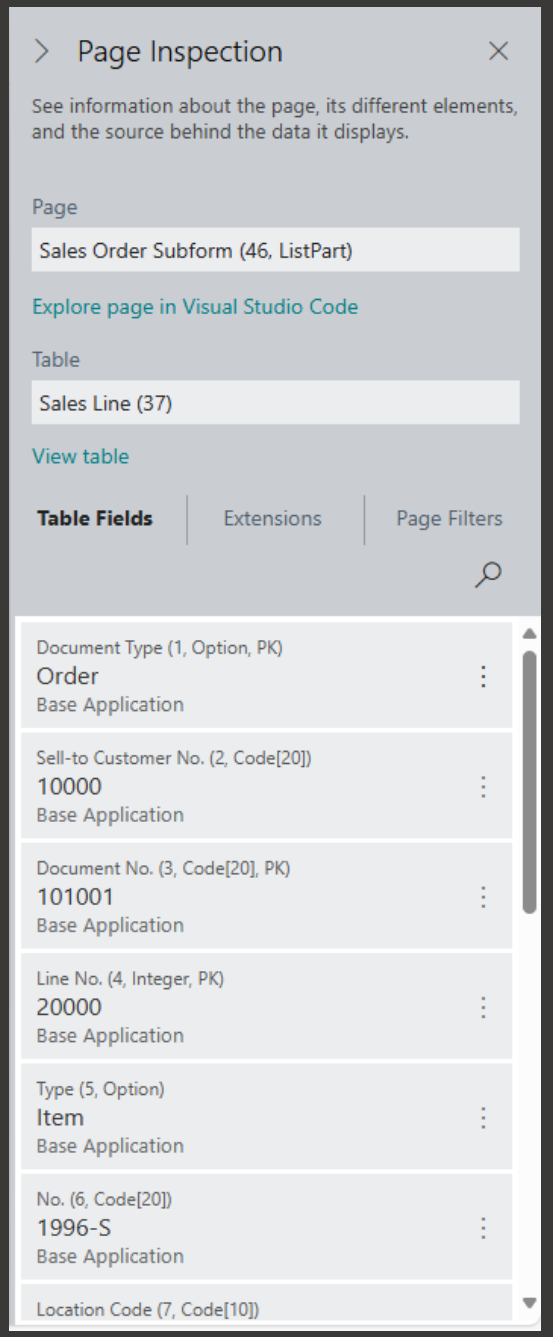
28. Page Inspection

CTRL + ALT + F1

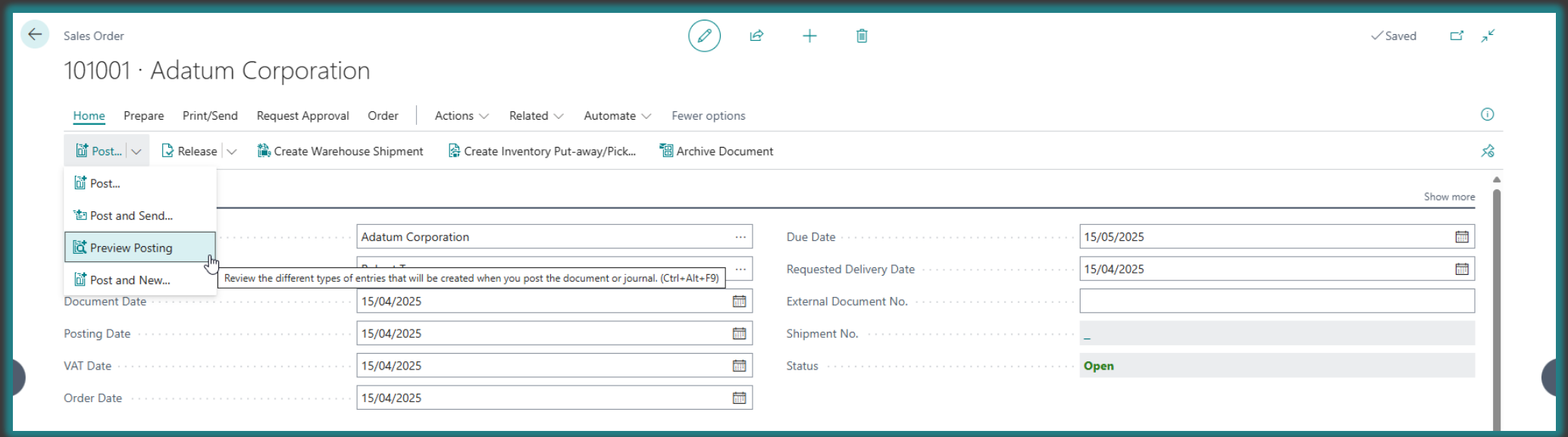
Allows for field identification

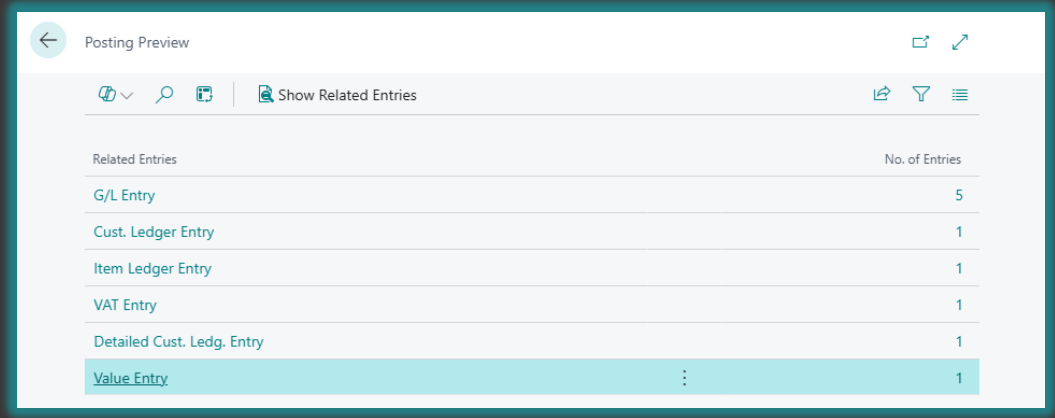
Page & Table IDs (Helpful when logging a ticket)

Extensions & Page Filters



29. Preview Posting





Tip: Keyboard Shortcut

CTRL+ALT+F9

30. Test Report

General Journal - Test

CRONUS UK Ltd.

23 April 2025
Page 1 / 1
USER_9AFAE48EF6994668B4D33EF3B81F1381

Journal Template Name: GENERAL
Journal Batch: DEFAULT

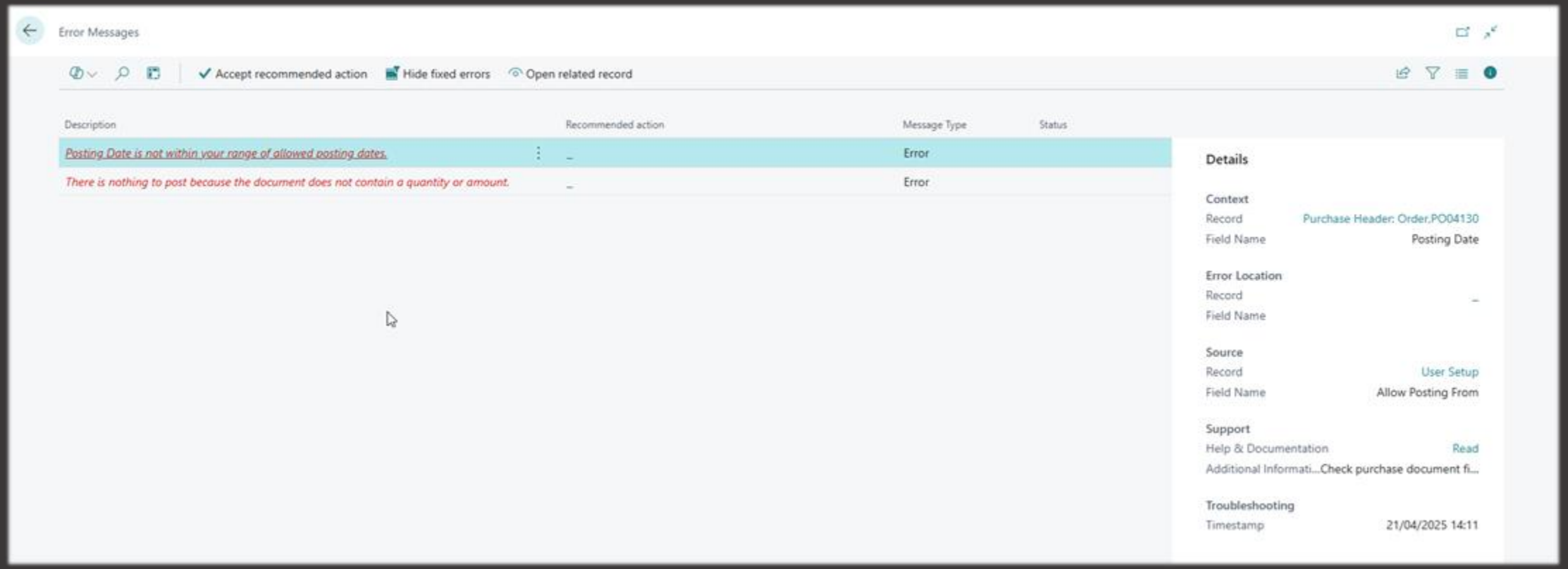
Gen. Journal Line: Journal Template Name: GENERAL, Journal Batch Name: DEFAULT

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

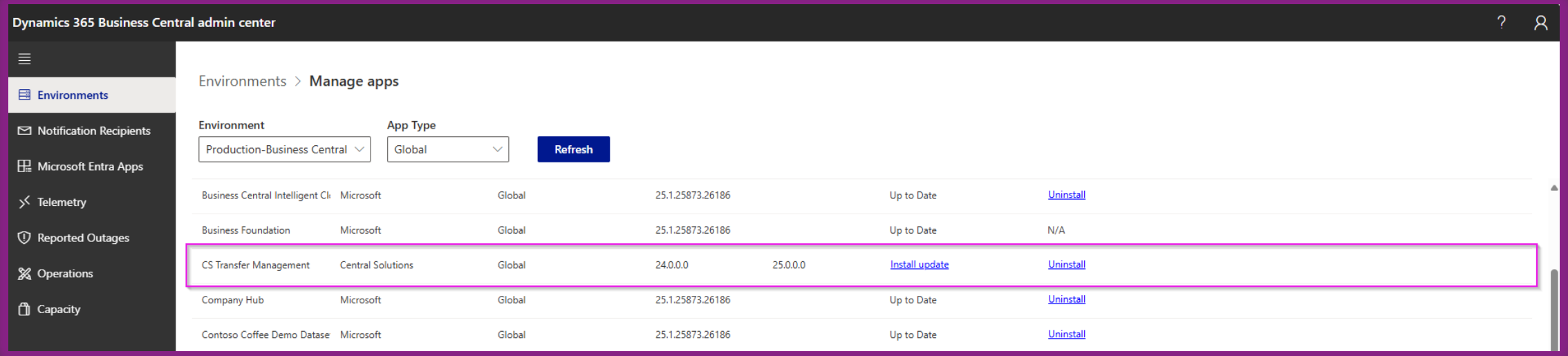
Test Report shows the errors on every line

31. Check Posting Errors



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

32. Update Extensions

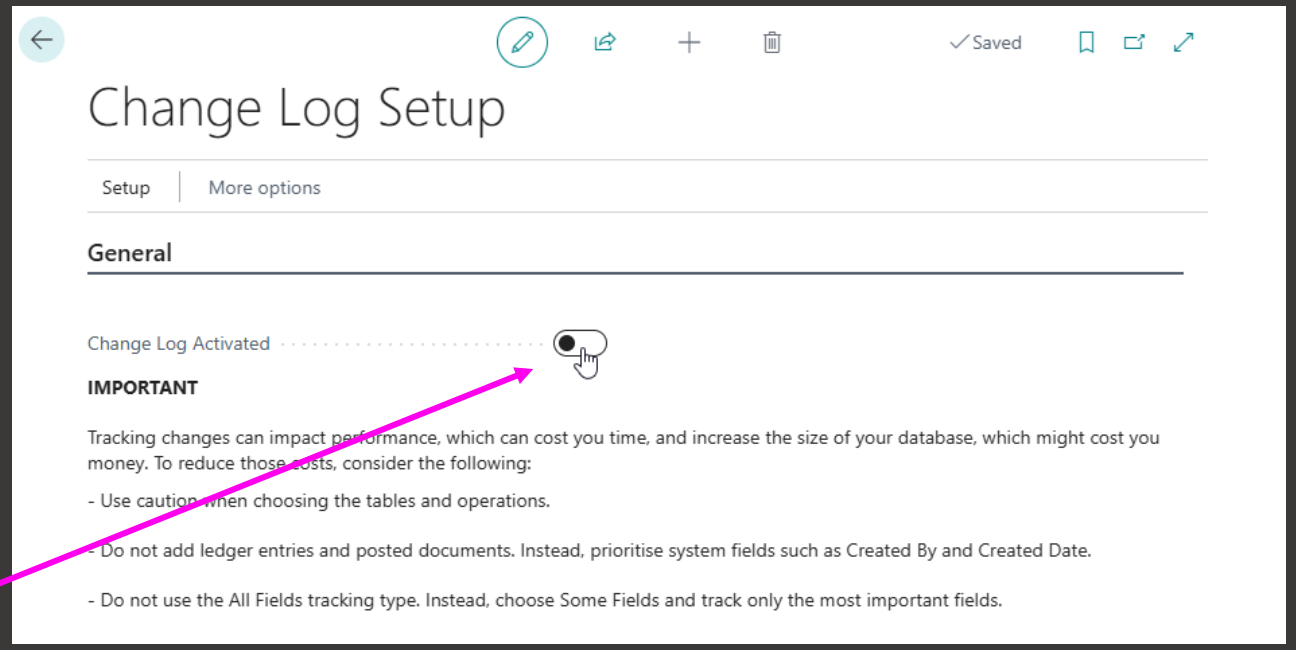


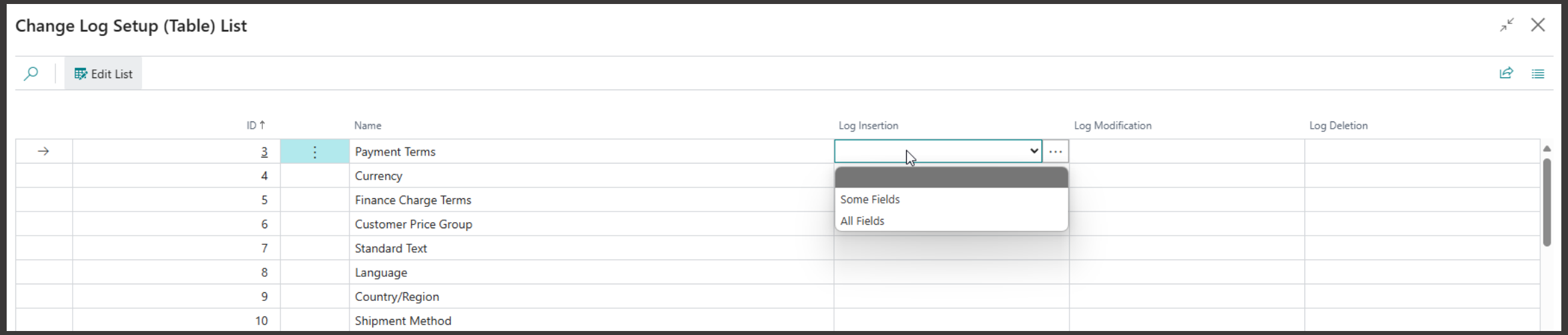
ADMINS and SUPER users, this one is for you!

33. Change Logs

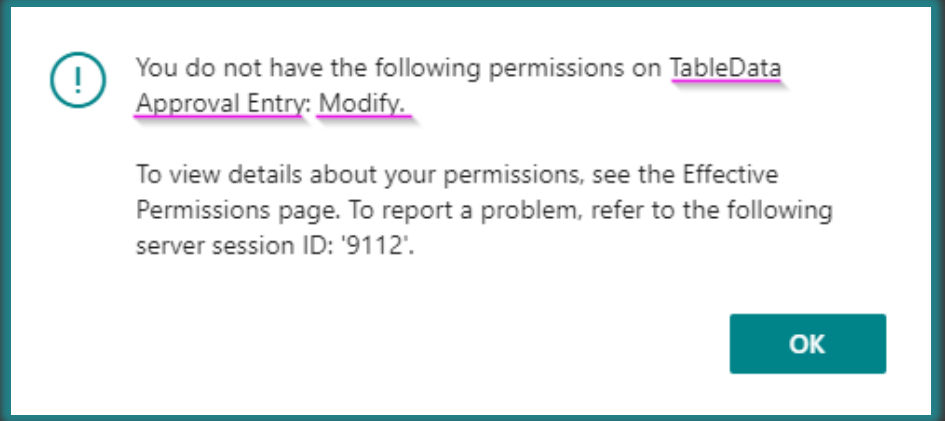
The Change Log is designed to track all direct modifications made by users to data in the database.

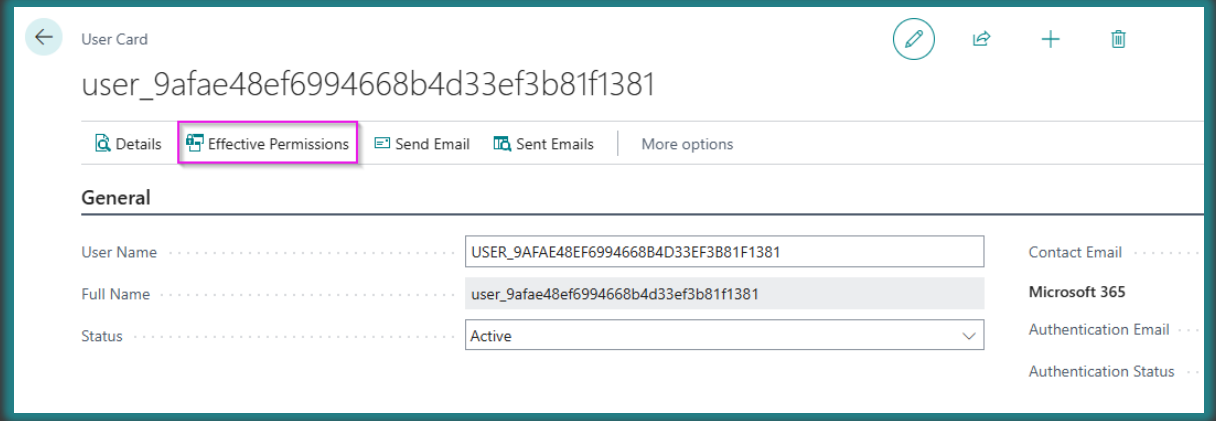
You can easily turn the Change Log on or off from the Change Log Setup page.

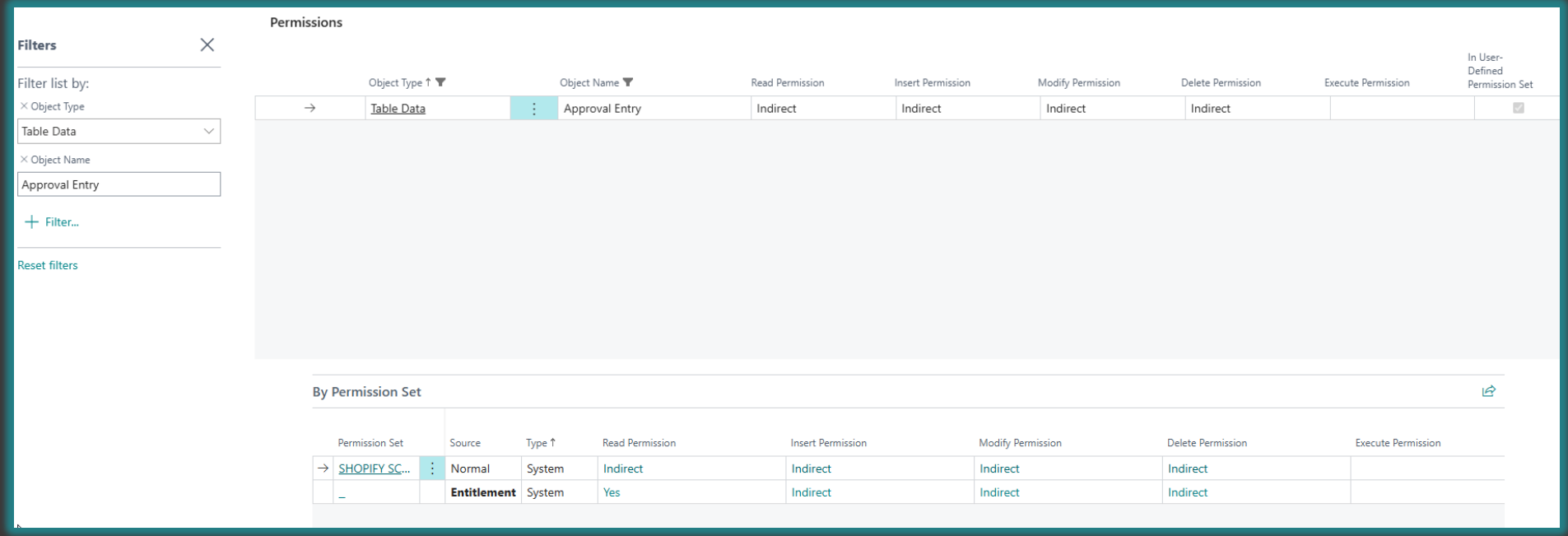




34. User Permission Errors

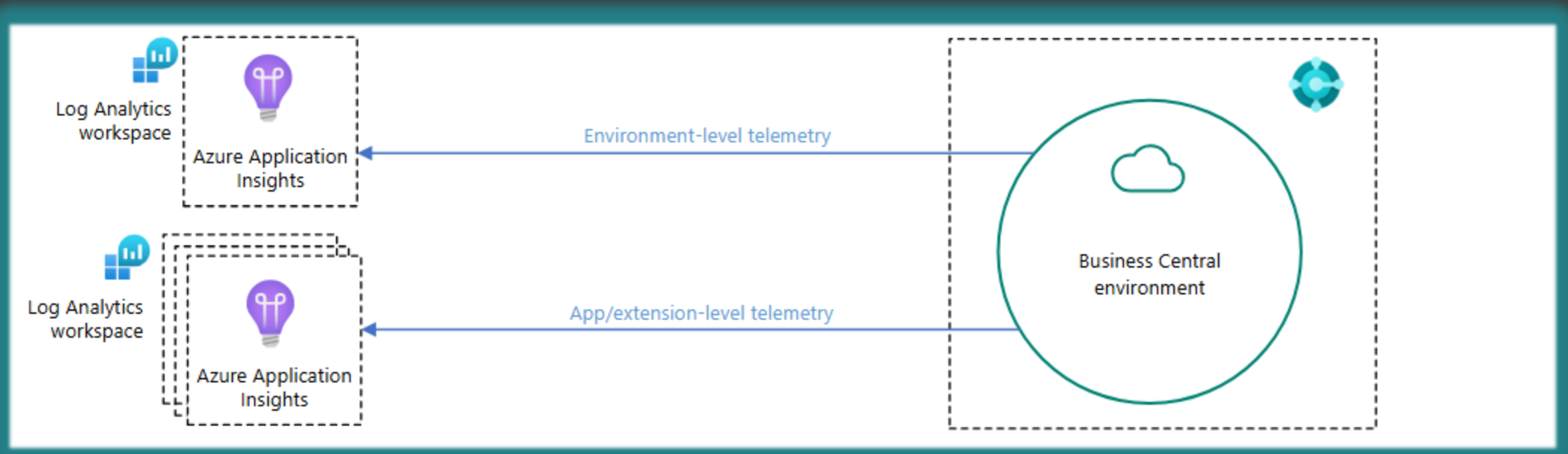






35. Clear Browser ~~History~~ Cache

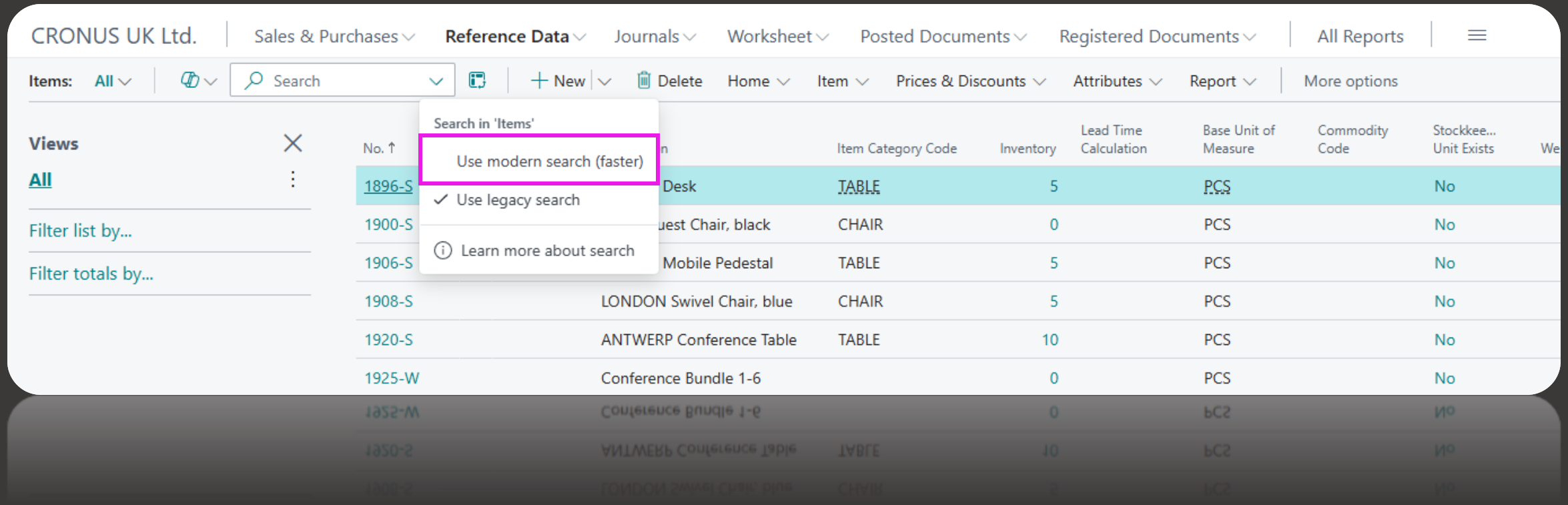
36. Telemetry



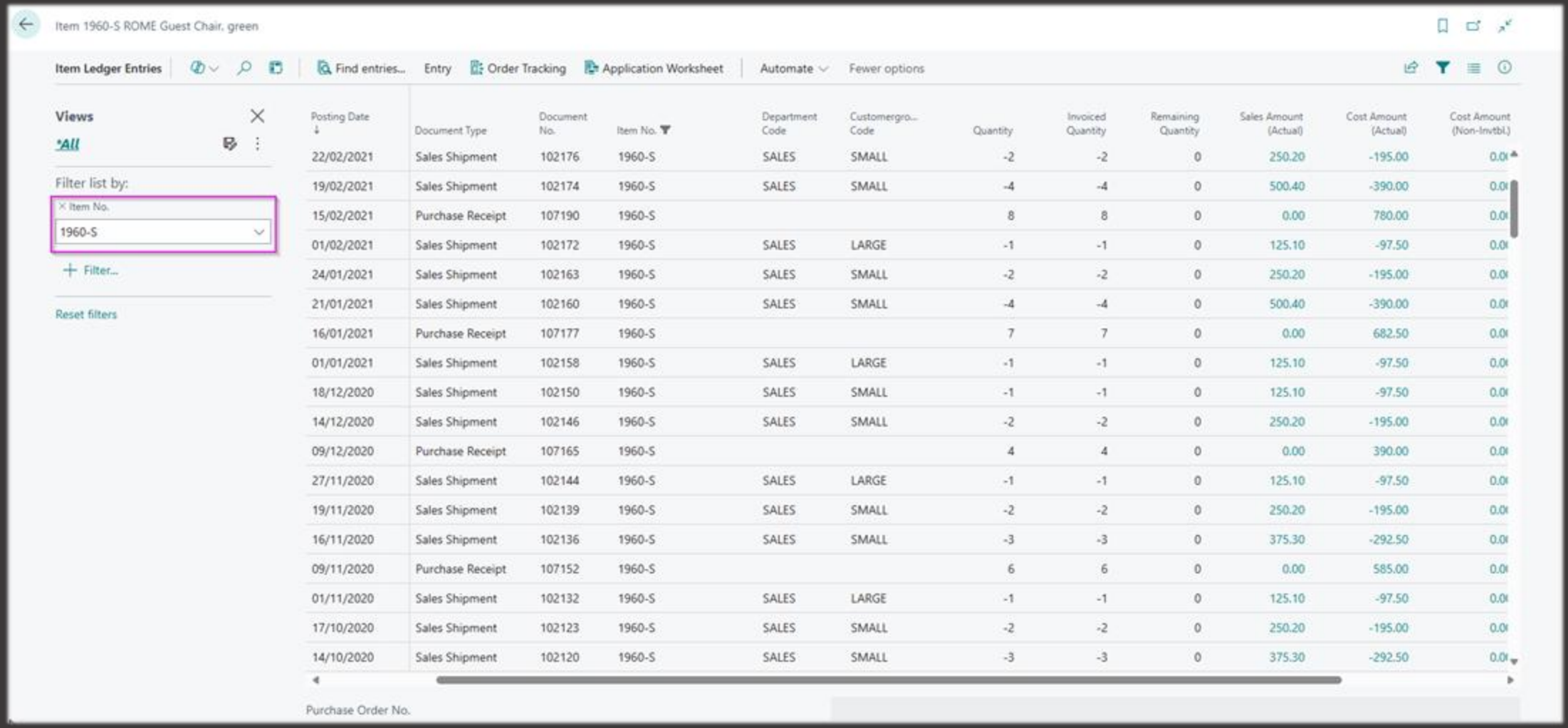
Efficiency Tips

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

37. Modern Search

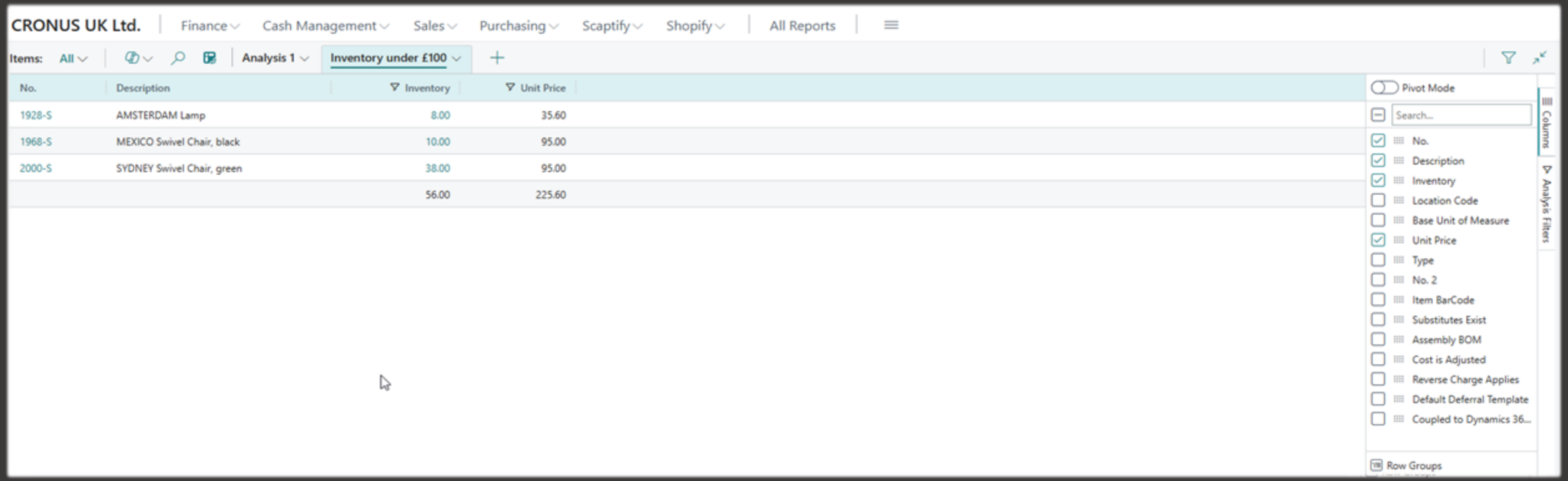


38. Using Filters instead of Search



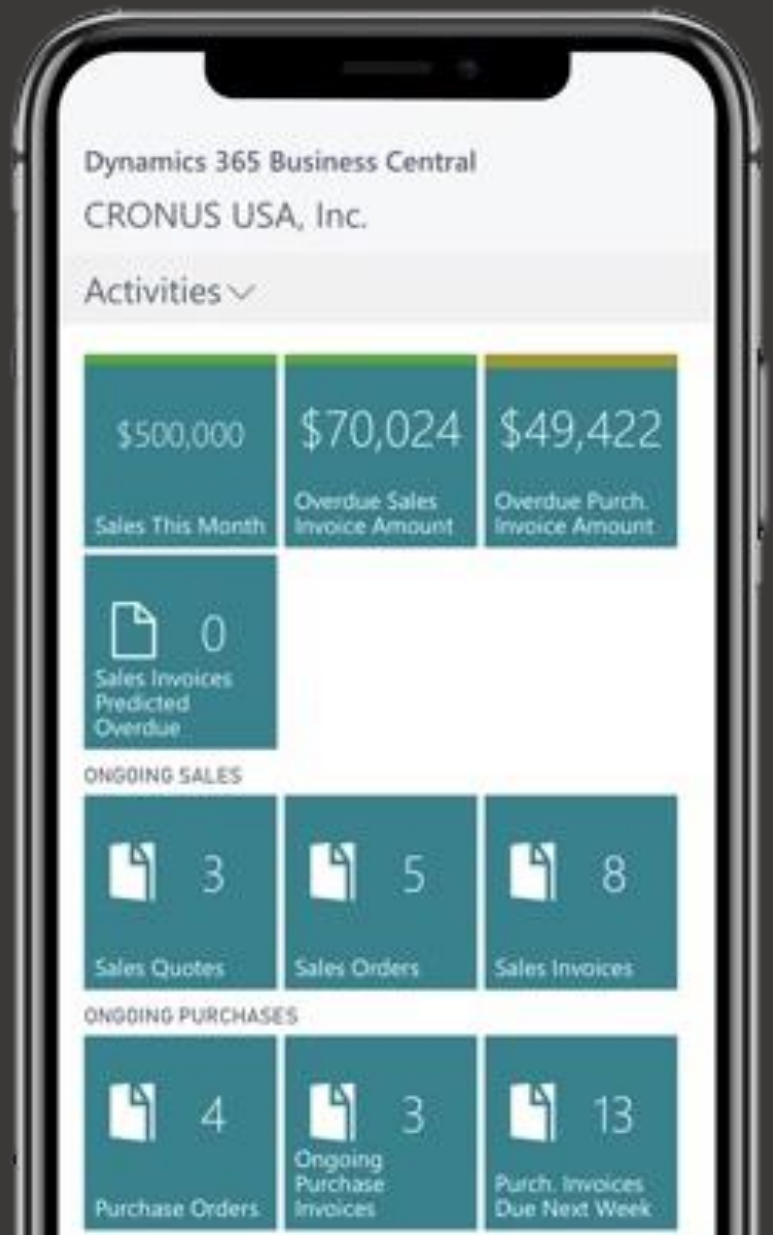
39. Analysis Mode

Allows the creation of detailed views and financial insights.



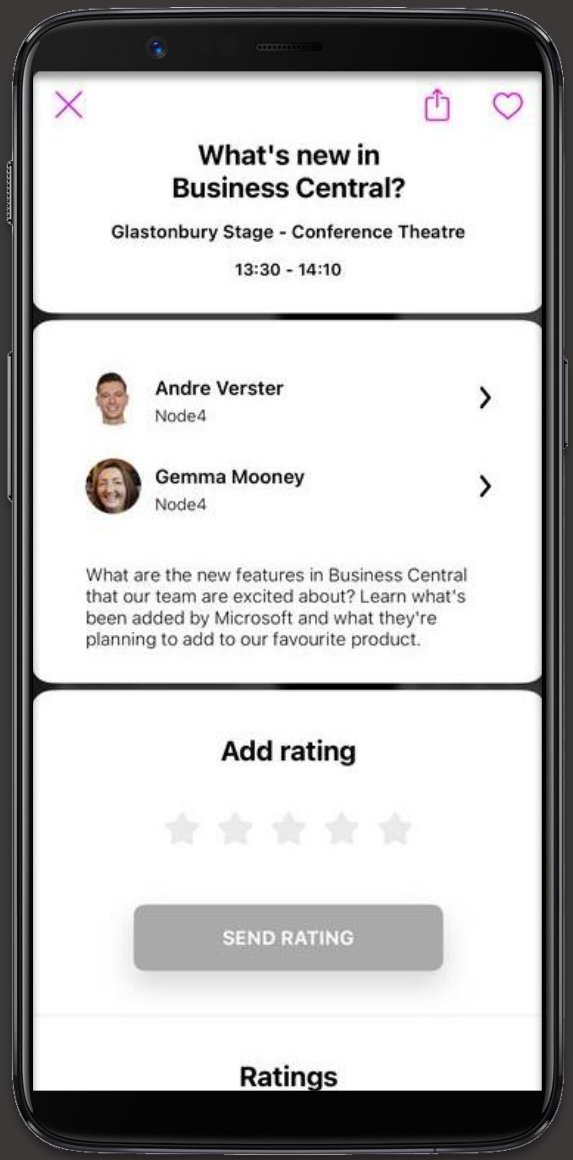
40. Mobile App

- 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