

UD 26

40 MORE Tips &
Tricks in 40
Minutes

Rowan & Nigel



Tips

01

Navigation

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Operational

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Manufacturing

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Sandbox and
Admin Centre










Navigation Tips

Tips and tricks to help you
navigate around Business Central



Tip 1: Use Factboxes to Avoid Opening Extra Pages

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

Items: All |  |  |  | + New | Delete | Home | Item | Prices & Discounts | Attributes | Report | More options |  |  |  |  |  | 

No. ↑	Description	Type	Inventory	Substi... Exist	Assem... BOM	Production BOM No.	Routing No.	Base Unit of Measure	Cost is Adj...	Unit Cost
SP-BOM2002	Heating element	Inventory	50	No	No			PCS	<input checked="" type="checkbox"/>	24.24
SP-BOM2003	Water tubing	Inventory	50	No	No			PCS	<input checked="" type="checkbox"/>	6.93
SP-BOM2004	Reservoir testing kit	Inventory	50	No	No			PCS	<input checked="" type="checkbox"/>	18.00
SP-BOM2005	Silicone adhesive	Non-Invent...	-	No	No			PCS	<input checked="" type="checkbox"/>	17.16
SP-BOM3001	Paint, black	Inventory	0	No	No			CAN	<input checked="" type="checkbox"/>	1.60
SP-BOM3002	Paint, red	Inventory	0	No	No			CAN	<input checked="" type="checkbox"/>	1.60
SP-BOM3003	Paint, white	Inventory	0	No	No			CAN	<input checked="" type="checkbox"/>	1.60
SP-SCM1004	AutoDrip	Inventory	0	No	No	SP-SCM1004	SP-SCM1004	PCS	<input checked="" type="checkbox"/>	0.00
SP-SCM1006	AutoDripLite	Inventory	0	No	No	SP-SCM1006...		PCS	<input checked="" type="checkbox"/>	0.00
SP-SCM1008	Airpot lite	Inventory	0	No	No			PCS	<input checked="" type="checkbox"/>	0.00
SP-SCM1009	Airpot	Inventory	0	No	No	SP-SCM1009	SP-SCM1009...	PCS	<input checked="" type="checkbox"/>	0.00
SP-SCM1011	Airpot Duo	Inventory	0	No	No	SP-SCM1011		PCS	<input checked="" type="checkbox"/>	0.00
WDB-1000	Whole Decaf Beans, Colombia	Inventory	100	No	No			PCS	<input checked="" type="checkbox"/>	59.00
WDB-1001	Whole Decaf Beans, Brazil	Inventory	50	No	No			PCS	<input checked="" type="checkbox"/>	113.00
WDB-1002	Whole Decaf Beans, Indonesia	Inventory	0	No	No			PCS	<input checked="" type="checkbox"/>	210.00
WDB-1003	Whole Decaf Beans, Mexico	Inventory	25	No	No			PCS	<input checked="" type="checkbox"/>	153.00

Details | Attachments (0)

Item Details - Invoicing

Item No. SP-BOM2002

Costing Method FIFO

Cost is Adjusted Yes

Cost is Posted to G/L Yes

Standard Cost 24.24

Unit Cost 24.24

Overhead Rate 0.00

Indirect Cost % 0

Last Direct Cost 24.24

Profit % 0

Unit Price 0.00

Item Details - Planning

Item No. SP-BOM2002

Reordering Policy Lot-for-Lot

Reorder Point 0

Tip 2: Adjustable FactBox Pane Width

Customer Card

10000 · Adatum Corporation

Home Request Approval New Document Prices & Discounts Customer Report More options

Contact Apply Template Merge With... Send Email

General

No.	10000	Credit Limit (LCY)	0.00
Name	Adatum Corporation	Blocked	
Balance (LCY)	0.00	Total Sales - Fiscal Year	0.00
Balance (LCY) As Vendor	0.00	Costs (LCY)	0.00
Overdue Balance (LCY)	0.00		

Address & Contact

Address		Phone No.	
Address	Station Road, 21	Mobile Phone No.	
Address 2		Email	robert.townes@contoso.com
Country/Region Code	GB	Home Page	
City	Cambridge	Contact	
County		Contact Name	Robert Townes
Post Code	CB1 2FB		

Show on Map

Summary


- The last payment receipt date is 3/17/2026, with 0 payments made this year, indicating no current year payment activity.
- Outstanding invoices total 14,092.20 GBP, and outstanding orders amount to 19,227.12 GBP, showing unpaid and unfulfilled order values.
- Total sales for this fiscal year are 11,743.50 GBP, with a credit limit set to 0.00 GBP, indicating no defined credit limit.

Show more

Details

Attachments (0)

Customer Picture



Sell-to Customer Sales History

Tip 3: Tell Me Search



Contoso Electronics Dynamics 365 Business Central

Environment: Production

Tell me what you want to do

Journal Templates

Go to Pages and Tasks Show less (3)

> FA Journal Templates	Administration
> Cost Journal Templates	Lists
> Item Journal Templates	Lists
> Excise Journal Templates	Administration
> Project Journal Templates	Administration
> General Journal Templates	Administration
> Resource Journal Templates	Administration
> Warehouse Journal Templates	Administration
> Insurance Journal Templates	Administration
> Sustainability Journal Templates	Administration
> Fixed Asset Reclassification Journal Templates	Administration

Search for 'Journal Templates'

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

See more

Ongoing Sales				Ongoing Purchases			Payments			Scan documents
Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices	Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week	Unprocessed Payments	Average Collec... Days	Outstanding V... Invoices	
18	15	0	7	29	3	0	1	0.0	21	Create Incomin...

Tip 4: Use Find Entries

Posted Sales Invoice

103296 · Alpine Ski House

Home Print/Send Invoice Incoming Document More options

Update Document Correct Find entries... Track Package Change Payment Service

General

No.	103296	Promised Pay Date	
Customer	Alpine Ski House	Quote No.	
Contact	Ian Deberry	Order No.	
Posting Date	2/1/2026	Cancelled	No
VAT Date	2/1/2026	Closed	<input type="checkbox"/>
Due Date	2/28/2026	Dispute Status	

Lines Manage Line

Type	No.	Item Reference No.	Description
→ Item	103296		BERLIN Guest Chair, yellow

Previously 'Navigate' in older versions of NAV

Posted Sales Invoice

103296 · Alpine Ski House

Home Print/Send Invoice Incoming Document More options

Update Document Correct

General

Find entries

Search for documents

Document No. 103296 External Document No.

Posting Date 02/01/26

Show Related Entries Find Print...

Related Entries	No. of Entries
→ Posted Sales Invoice	1
G/L Entry	6
VAT Entry	1
Cust. Ledger Entry	2
Detailed Cust. Ledg. Entry	4
Value Entry	1

Lines Manage Line

Tip 5: Company Badge for Easy Recognition

Contoso Electronics Dynamics 365 Business Central Environment: Production

Company Information

Postcode: W2 8HG Industrial Classification: [Redacted]
Country/Region Code: GB Picture:

Contact Name: Adam Matteson
Phone No.: 0666-666-6666

Communication >
Payments >
Shipping >
Statutory >

Company Badge

Company Badge: Custom Company Badge Text: CRONUS
Company Badge Style: Light Blue

Environment: Production MA

Available Companies

Search

Production

- CRONUS UK Ltd. ✓
- My Company

Sandbox16032026

- Cronus 2.0
- CRONUS UK Ltd.
- My Company

Circle for Production

Square for Sandbox

Tip 6: Utilise Page Inspection for Audit Fields

CTRL + ALT + F1 opens Page Inspection

The screenshot shows a Dynamics 365 Sales Order form for 'Alpine Ski House' (Sales Order 101017). The form is divided into sections: General, Sell-to, and Work Description. The Page Inspection tool is open on the right, displaying a list of fields and their data types. The 'SystemCreatedAt' field is highlighted with a pink box.

Table Fields	Extensions	Page Filters
Document Type (1, Option, PK) Order Base Application		
Sell-to Customer No. (2, Code[20]) 40000 Base Application		
No. (3, Code[20], PK) 101017 Base Application		
Bill-to Customer No. (4, Code[20]) 40000 Base Application		
Bill-to Name (5, Text[100]) Alpine Ski House Base Application		
Bill-to Name 2 (6, Text[50]) (Blank) Base Application		
SystemCreatedAt (2000000001, DateTime)		
SystemCreatedBy (2000000002, GUID)		
SystemModifiedAt (2000000003, DateTime)		
SystemModifiedBy (2000000004, GUID)		

This is a close-up view of the Page Inspection tool. It shows the 'SystemCreatedAt' field highlighted with a pink box. The field's data is '17/04/26 14:58'. Other fields visible include 'SystemCreatedBy' (ADMIN) and 'SystemModifiedAt' (24/04/26 13:15).

Operational Tips

Tips and tricks to aid your operational efficiency whilst using Business Central



Tip 7: Upload Multiple Files in Attachments

The screenshot illustrates the process of uploading multiple files. On the left, a File Explorer window is open, showing a selection of files: 'Excel - Copy', 'Excel', 'Word - Copy', and 'Word'. In the center, a 'Select files' dialog box is displayed with a dashed box indicating where to drop files and a link to 'click here to browse'. On the right, the software interface shows the 'Attachments (4)' section, which contains a table of the uploaded documents.

Name	File Extension
Excel - Copy	xlsx
Excel	xlsx
Word - Copy	docx
Word	docx

Drag and drop or open File Explorer

Tip 8: Preview PDF Attachments In-Browser

Posted Sales Invoice - 103297 - Ad

https://businesscentral.dynamics.com/?company=CRONUS%20UK%20Ltd.&page=132&filter=%27Sales%20Invoice%20Header%27,%27No.%27%20IS%20%27103297%27&dc=0&bookmark=17_cAAAAAJ7BJEAMAAzADIAOQA3

Node4 Node4 2.0

Contoso Electronics Dynamics 365 Business Central Environment: Production

Invoice 103297
31 January 2026
Page 1 / 1

cronus

Adatum Corporation
Robert Townes
Station Road, 21
Cambridge, CB1 2FB
Great Britain

CRONUS International Ltd.
7122 South Ashford Street
Westminster
London, W2 8HG
Great Britain

Your Reference: OPEN
Salesperson: Jim Olive
Due Date: 28 February 2026
Payment Terms: 1 Month/2% 8 days

Order No.: 101001
Shipment Method:
Payment Method:

Shipping Agent Code: FEDEX
Package Tracking No.:

No.	Description	Shipment Date	Quantity	Unit Price Excl. VAT	VAT %	Line Amount Excl. VAT
1996-S	ATLANTA Whiteboard, base	29/03/26	12 Piece	906.70	20	10,880.40
Subtotal						10,880.40
20% VAT						2,176.08
Total £ Incl. VAT						13,056.48

VAT Clause
VAT Identifier

1 / 1

Tip 9: Use 'Copy Document'

Sales Order 101011

Start validating data in documents and journals while you work. Messages are shown in the Document Check FactBox. Enable this for me | Don't show again

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

Copy Document... Get Recurring Sales Lines... Incoming Document Calculate Invoice Discount Move Negative Lines...

General Copy document lines and header information from another sales document to this document. You can copy a posted sales invoice into a new sales invoice to quickly create a similar document. Show less

Details Attachments (0)

Copy Sales Document

Options

Document Type Quote

Document No. * Quote

Doc. No. Occurrence Blanket Order

Version No. Order

Sell-to Customer No. Invoice

Sell-to Customer Name Return Order

Include Header Credit Memo

Recalculate Lines Posted Shipment

Posted Invoice

Posted Return Receipt

Posted Credit Memo

Arch. Quote

Arch. Order

Arch. Blanket Order

Arch. Return Order

Copy Sales Document

Options

Document Type Quote

Document No. * ...

Doc. No. Occurrence

Version No.

Sell-to Customer No.

Sell-to Customer Name

Include Header

Recalculate Lines

OK Cancel

Tip 10: Actions Across Multiple Selected Records

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


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

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Assigned User	Document Date	Status	Compl... Shipped	Amount Shipped Not Invoiced (LCY)	Amount Shipped Not Invoiced (LCY) Incl. VAT	Amount	Amount Including VAT
101012	40000	Alpine.Ski.House			1/1/2027	Open	No	0.00	0.00	900.00	900.00
101013	40000	Alpine.Ski.House			1/1/2027	Open	No	0.00	0.00	900.00	900.00
101014	40000	Alpine.Ski.House			1/1/2027	Open	No	0.00	0.00	900.00	900.00
101015	40000	Alpine.Ski.House			1/1/2027	Open	No	0.00	0.00	900.00	900.00

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

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

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Document Date	Status	Compl... Shipped	Amount Shipped Not Invoiced (LCY)	Amount Shipped Not Invoiced (LCY) Incl. VAT	Amount	Amount Including VAT
101012	40000	Alpine.Ski.House				1/1/2027	Released	No	0.00	0.00	900.00	900.00
101013	40000	Alpine.Ski.House				1/1/2027	Released	No	0.00	0.00	900.00	900.00
101014	40000	Alpine.Ski.House				1/1/2027	Released	No	0.00	0.00	900.00	900.00
101015	40000	Alpine.Ski.House				1/1/2027	Released	No	0.00	0.00	900.00	900.00

 All of your selections were processed.

OK

Tip 11: Word Report Layouts

The image shows a Microsoft Word document in the Developer tab, illustrating various report layout controls. Annotations on the left side point to specific elements:

- Developer tab:** Points to the 'Developer' tab in the ribbon.
- Company logo:** Points to a placeholder box with the text 'The picture can't be displayed.'
- Label field:** Points to the 'DocumentTitle Lbl DocumentNo' control.
- Selected plain text control for data field:** Points to the '#Nav: /Header/ CustomerAddress1' control.
- Tables:** Points to two tables: one for reference information and one for line items.
- Repeater control for rows:** Points to the 'ItemNo Lbl Description Line Lbl' control, which is used to repeat rows in the line items table.

The report layout includes the following sections:

- DocumentTitle Lbl DocumentNo
- DocumentDate
- Page Lbl 1/1
- CustomerAddress1 through CustomerAddress8
- CompanyAddress1 through CompanyAddress8
- CompanyLegalOffice Lbl CompanyLegalOffice
- Table with columns: YourReference Lbl, QuoteValidToDate Lbl, SalesPersonBank Lbl, PaymentTermsDescription Lbl, ShipmentMethodDescription Lbl
- Table with columns: YourReference, QuoteValidToDate, SalesPersonName, PaymentTermsDescription, ShipmentMethodDescription
- WorkDescriptionLine
- Table with columns: ItemNo Lbl, Description Line Lbl, Quantity Line Lbl, UnitPrice Lbl, VATPct Line Lbl, LineAmount Line Lbl
- Table with columns: ItemNo L, Description Line, Quantity Line, UnitOf Measure, UnitPrice, LineDiscount Percent Text Line, LineAmount Line
- Table with columns: Description ReportTotalsLine, Amount ReportTotalsLine
- Table with columns: TotalIncludingVATText, TotalAmountIncludingVAT

The XML Mapping pane on the right shows the following structure:

```
Custom XML Part:
urn:microsoft-dynamics-nav/r...
NavWordReportXmlPart
  Header
    BillToContactEmail
    BillToContactEmailLbl
    BillToContactMobilePhoneN
    BillToContactMobilePhoneN
    BillToContactPhoneNo
    BillToContactPhoneNoLbl
    BilltoCustomerNo_Lbl
    BilltoCustomerNo
    CompanyAddress1
    CompanyAddress2
    CompanyAddress3
    CompanyAddress4
    CompanyAddress5
    CompanyAddress6
    CompanyAddress7
    CompanyAddress8
    CompanyBankAccountNo
    CompanyBankAccountNo_L
    CompanyBankBranchNo
    CompanyBankBranchNo_Lb
    CompanyBankName
    CompanyBankName_Lbl
    CompanyCustomGiro
    CompanyCustomGiro_Lbl
    CompanyEmail
    CompanyGiroNo
    CompanyGiroNo_Lbl
    CompanyHomePage
    CompanyIBAN
    CompanyIBAN_Lbl
    CompanyLegalOffice
    CompanyLegalOffice_Lbl
    CompanyLegalStatement
    CompanyLogoPosition
    CompanyPhoneNo
```

Tip 12: Concurrent Posting

Contoso Electronics Dynamics 365 Business Central Environment: Production

Item Journals ✓ Saved

Batch Name: DEFAULT

Manage Home Line Page More options

Post Post Adjustment... Get Standard Journals... Explode BOM

Print... Recalculate Unit Amount

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

Post and Print

Posting Date	Entry Type	Document No.	Item No.	Description	Location Code	Quantity	Unit of Measure Code
01/01/2027		T00001	1896-S	ATHENS Desk	EAST	500	PCS
01/01/2027		T00001	1900-S	PARIS Guest Chair, black	EAST	500	PCS
01/01/2027		T00001	1936-S	BERLIN Guest Chair, yellow	EAST	500	PCS
01/01/2027		T00001	2000-S	SYDNEY Swivel Chair, green	EAST	500	PCS
01/01/2027		T00001	1980-S	MOSCOW Swivel Chair, red	EAST	500	PCS
01/01/2027		T00001	1906-S	ATHENS Mobile Pedestal	EAST	500	PCS
01/01/2027		T00001	1996-S	ATLANTA Whiteboard, base	EAST	500	PCS
01/01/2027		T00001	1964-S	TOKYO Guest Chair, blue	EAST	500	PCS
01/01/2027		T00001	1960-S	ROME Guest Chair, green	EAST	500	PCS
01/01/2027		T00001	1000-BK	Jeans - Black	EAST	500	PCS
01/01/2027		T00001	1896-S	ATHENS Desk	EAST	500	PCS
01/01/2027		T00001	1900-S	PARIS Guest Chair, black	EAST	500	PCS
01/01/2027		T00001	1906-S	ATHENS Mobile Pedestal	EAST	500	PCS
01/01/2027		T00001	1908-S	LONDON Swivel Chair, blue	EAST	500	PCS
01/01/2027		T00001	1996-S	ATLANTA Whiteboard, base	EAST	500	PCS

Item Description: ATHENS Mobile Pedestal

Contoso Electronics Dynamics 365 Business Central Environment: Production

Item Journals ✓ Saved

Batch Name: TEST

Manage Home Line Page More options

Post Post Adjustment... Get Standard Journals... Explode BOM

Print... Recalculate Unit Amount

Calculate Warehouse Adjustment... Get Standard Journals... Explode BOM

Posting Date	Entry Type	Document No.	Item No.	Description	Location Code	Quantity	Unit of Measure Code
01/01/2027	Positive Ad...	T00001	1000-BK	Jeans - Black	EAST	500	P
01/01/2027	Positive Ad...	T00001	1896-S	ATHENS Desk	EAST	500	P
01/01/2027	Positive Ad...	T00001	1900-S	PARIS Guest Chair, black	EAST	500	P
01/01/2027	Positive Ad...	T00001	1908-S	LONDON Swivel Chair, blue	EAST	500	P
01/01/2027	Positive Ad...	T00001	1925-W	Conference Bundle 1-6	EAST	500	P
01/01/2027	Positive Ad...	T00001	1920-S	ANTWERP Conference Table	EAST	500	P
01/01/2027	Positive Ad...	T00001	1968-S	MEXICO Swivel Chair, black	EAST	500	P
01/01/2027	Positive Ad...	T00001	1936-S	BERLIN Guest Chair, yellow	EAST	500	P
01/01/2027	Positive Ad...	T00001	GRH-1001	Smart Grind Home	EAST	500	P
01/01/2027	Positive Ad...	T00001	1964-S	TOKYO Guest Chair, blue	EAST	500	P
01/01/2027	Positive Ad...	T00001	1896-S	ATHENS Desk	EAST	500	P
01/01/2027	Positive Ad...	T00001	1000-BK	Jeans - Black	EAST	500	P
01/01/2027	Positive Ad...	T00001	1900-S	PARIS Guest Chair, black	EAST	500	P
01/01/2027	Positive Ad...	T00001	1906-S	ATHENS Mobile Pedestal	EAST	500	P
01/01/2027	Positive Ad...	T00001	1908-S	LONDON Swivel Chair, blue	EAST	500	P

Item Description: Whole Decaf Beans, Kenya

Tip 13: Use Background Posting Where Available

← ✎ 🔗 + 🗑️ ✓ Saved 📄 🔗

Purchases & Payables Setup

Vendor Posting Groups | Incoming Documents Setup | More options

General >

Number Series >

Background Posting

Post with Job Queue Job Queue Category Code DOCPOST

Post & Print with Job Queue Report Output Type PDF

Reverse Charge >

← ✎ 🔗 + 🗑️ ✓ Saved 📄 🔗

Sales & Receivables Setup

Customer Groups | Payments | More options

General >

Dimensions >

Bank Deposits >

Number Series >

Background Posting

Post with Job Queue Report Output Type PDF

Job Queue Category Code DOCPOST

← ✎ 🔗 + 🗑️ ✓ Saved 📄 🔗

General Ledger Setup

Home | Posting | General | VAT | Bank | Journal Templates | More options

Change Payment Tolerance | Change Global Dimensions...

General >

Dimensions >

Currency >

Background Posting

Post with Job Queue Notify On Success

Post & Print with Job Queue Report Output Type PDF

Job Queue Category Code JRNLPPOST

Enable Background Posting and create a Job Queue entry to Post documents in the background

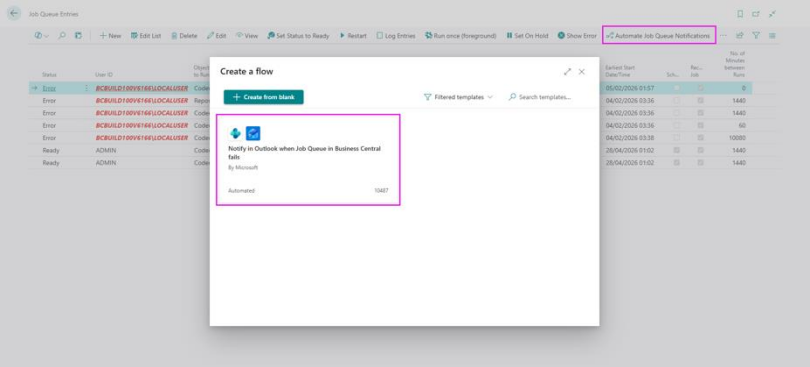
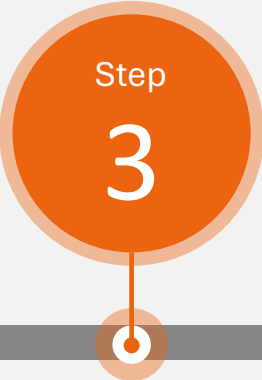
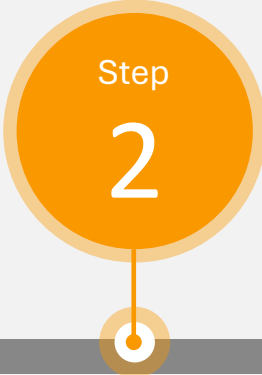
Tip 14: Clean Up Old & Failing Job Queues

Job Queue Entries

+ New Edit List Delete Edit View Set Status to Ready Restart Log Entries Run once (foreground) Set On Hold Show Error Automate Job Queue Notifications

Status	Object Type to Run	Object ID to Run	Object Caption to Run	Description
Error	Codeunit	260	Document-Mailing	Sales Invoice
Error	Report	299	Delete Invoiced Sales Orders	Delete Invoiced Sales Orders
Error	Codeunit	384	Upd. Pending Prepm. Purchase	Upd. Pending Prepm. Purchase
Error	Report	499	Delete Invoiced Purchase Orders	Delete Invoiced Purchase Orders
Error	Report	795	Adjust Cost - Item Entries	Adjust Cost - Item Entries
Error	Codeunit	842	Cash Flow Forecast Update	Cash Flow Forecast Update
Error	Codeunit	1281	Update Currency Exchange Rates	Floatrates API Service - recurring update of exchange rates
Error	Report	1511	Delegate Approval Requests	Auto-created for sending of delegated approval requests. Can be deleted if not used. Will be recreated when the feature is activated.
Error	Codeunit	1853	Sales Forecast Update	Sales Forecast Update
Error	Codeunit	6090	FA Ledger Entries Scan	
Error	Codeunit	50102	GFSJobQue	GFS Manifest Sync
Error	Codeunit	50104	Auto Ship And Invoice Posting	Auto Ship And Invoice Posting
Error	Codeunit	50105	SalesRetailer&ReturnOdrProcess	Push PSI to Return Portal
Error	Codeunit	50105	SalesRetailer&ReturnOdrProcess	Push PSI to Return Portal
Error	Codeunit	16041788	FSG_GA_BackgroundRefresh	Keeps Fenwick Gold Subscriptions up-to-date, without interrupting user sessions.
Error	Codeunit	50105	SalesRetailer&ReturnOdrProcess	SalesRetailer&ReturnOdrProcess
Error	Codeunit	8058	Update Sub. Lines Term. Dates	Update Serv. Comm. Term. Dates
Error	Codeunit	36952	Update Dim. Set Entries	Update Power BI Dimension Set Entries
Error	Codeunit	260	Document-Mailing	Remittance Advice
Error	Codeunit	260	Document-Mailing	Remittance Advice
Error	Codeunit	260	Document-Mailing	Remittance Advice
Error	Codeunit	260	Document-Mailing	Remittance Advice
Error	Codeunit	260	Document-Mailing	Remittance Advice

Tip 15: Get Notified When a Job Queue Fails

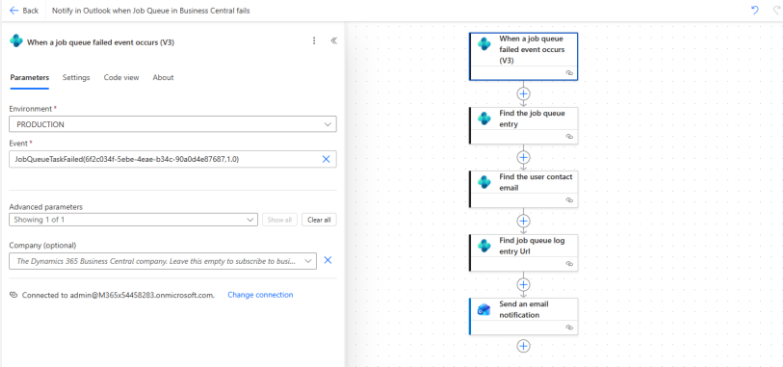


Workflow added, but not yet enabled

Your new workflow has been saved, but it is turned off. You'll need to [go to Power Automate](#) and run the Flow Checker to fix this issue.

Need help?
[Go to the troubleshooting guide](#)

OK



Copilot and AI Tips

Tips and tricks to get the best out of using Copilot and AI in Business Central



Tip 16: Suggest Sales Lines

NODE4 Dynamics 365 Business Central

Environment: Production

Sales Order

102065 · National Space Centre

Home Prepare Approve Print/Send Request Approval Order Report Synchronise More options

General

Customer Name: National Space Centre
Contact:
Document Date: 01/12/2027
Posting Date: 01/12/2027
VAT Date: 01/12/2027
Order Date: 01/12/2027

Due Date: 01/01/2028
Requested Delivery Date:
External Document No.:
Status: **Open**
Attachments: -
Master Order No.: M-01631

Lines | Manage Line | Order | Sana Commerce

Functions | Item Availability by | Related Information

Type	Catalogue Code	No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Margin %	Line Discount %	Line Amount Excl. VAT
→ Item		*	*				0.00		

Subtotal Excl. VAT (GBP): 0.00 Total Excl. VAT (GBP): 0.00

Tip 17: Chat With Copilot

The screenshot shows the Dynamics 365 Business Central interface for 'CRONUS UK Ltd.'. The top navigation bar includes 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. A 'Get started' banner for Business Central is visible, with a 'Show demo tours' button. Below this is an 'Activities' section with four key metrics: Sales This Month (£0), Overdue Sales Invoice Amount (£44,005), Overdue Purch. Invoice Amount (£98,606), and Sales Invoices Predicted Overdue (0). At the bottom, there are two sections: 'Ongoing Sales' with metrics for Sales Quotes (18), Sales Orders (10), Completely Re... from Stock (0), and Sales Invoices (7); and 'Ongoing Purchases' with metrics for Purchase Orders (29), Ongoing Purc... Invoices (3), and Purch. Invoices... Next Week (0). On the right side, the Copilot chat window is open, displaying a welcome message and several prompt buttons: 'Find Look up...', 'Explain & Guide Help me understand...', 'Ask Please answer...', 'How do I release a sales order?', 'Show the latest invoices', and 'Show customers grouped by their location'. A 'View prompts' button and an 'Ask a question' input field are also visible.

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

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

Get started

Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

Show demo tours

Some features connect to other Microsoft services

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
£0	£44,005	£98,606	0
See more	See more	See more	See more

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
18	10	0	7

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
29	3	0

Hi MOD Administrator,

Welcome back! You can get answers about your company data and assistance with tasks and information.

- Find Look up...
- Explain & Guide Help me understand...
- Ask Please answer...

You can use the prompt guide for suggestions by selecting this button

Terms of use | Learn more

How do I release a sales order?

Show the latest invoices

Show customers grouped by their location

View prompts

Ask a question

Tip 18: Bank Reconciliation with Copilot

Bank Acc. Reconciliation
CHECKING · 83

Home **Bank** Matching Show | Actions Automate Fewer options

Import Bank Statement Bank Account Card Connect to Banks Get Transactions from Bank

General

Bank Account No. CHECKING Balance Last Statement -1,312.50
 Statement No. 83 Statement Ending Balance 0.00
 Statement Date 16/04/2026

Bank Statement Lines

Transaction Date	Document No.	Cheque No.	Description	Statement Amount	Applied Amount	Rec...
				0.00		<input type="checkbox"/>

Total Difference 0.00 Total Balance -1,312.50
 Reconciled 0.00
 Balance -1,312.50 Total Reconciled 0.00

Bank Account Ledger Entries

Posting Date	Document Type	Document No.	Description	Amount	Remaining Amount
06/04/2020	Payment	G04001	Trey Research	600.48	600.48
06/04/2020	Payment	G04002	School of Fine Art	6,936.80	6,936.80
06/04/2020	Payment	G04003	Relecloud	2,113.92	2,113.92
06/04/2020	Payment	G04004	School of Fine Art	741.60	741.60
06/04/2020	Payment	G04005	Alpine Ski House	2,617.50	2,617.50
06/05/2020	Payment	G04006	Trey Research	900.72	900.72
06/05/2020	Payment	G04007	School of Fine Art	9,904.70	9,904.70
06/05/2020	Payment	G04008	School of Fine Art	1,729.80	1,729.80
06/05/2020	Payment	G04009	Relecloud	2,113.92	2,113.92
01/12/2024	Payment	G04011	The Cannon Group PLC	2,176.08	2,176.08
01/12/2024	Payment	G04012	The Cannon Group PLC	299.04	299.04
02/06/2023	Payment	G04012	Order 106017	-500.00	-500.00

Balance -536,583.55 Total on Outstanding ... 0.00
 Balance To Reconcile -534,483.63

Tip 19: Summarise With Copilot

The screenshot shows a 'Customer Card' for '10000 · Adatum Corporation'. The card is divided into sections: 'General' and 'Address & Contact'. The 'General' section includes fields for No., Name, Balance (LCY), Balance (LCY) As Vendor, Overdue Balance (LCY), Credit Limit (LCY), Blocked, Total Sales - Fiscal Year, and Costs (LCY). The 'Address & Contact' section includes fields for Address, Address 2, Country/Region Code, Phone No., Mobile Phone No., Email, and Home Page. A Copilot 'Summary' overlay is visible on the right side of the card, highlighted with a purple border. The overlay shows a search bar and a 'Summary' section with a 'Preview' button. Below the summary, there is a 'Customer Picture' section with a circular image of a man's face and a 'Sell-to Customer Sales History' section.

- Instant AI summary of any record
- Tailored to your role

The detailed view of the Copilot Summary overlay shows the following content:

- Summary** (Preview) now
- The balance due is **13,056.48 GBP**, matched by the overdue amount of **13,056.48 GBP**, indicating outstanding payment.
- The last payment receipt date is **17/03/2026**, showing recent payment activity, with **8** ongoing sales orders indicating active transactions.
- Total sales amount to **11,743.50 GBP**, and the original profit percentage last year was **28.9**, representing sales and profitability metrics.

[Show more](#)

AI-generated content may be incorrect

Details Attachments (0)

Customer Picture

Tip 20: Copilot Analysis Assist

Contoso Electronics | Dynamics 365 Business Central

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

Purchase Orders: All | Analysis 1 | **Open orders over 1000**

No.	Buy-from Vendor Name	Status	Amount
1	Fabrikam, Inc.	Open	3,546.20
2	First Up Consultants	Open	1,365.00
3	Wide World Importers	Open	7,092.00
4	Graphic Design Institute	Open	2,375.40
5	Graphic Design Institute	Open	30,396.00
6	Nod Publishers	Open	2,925.00
7	Graphic Design Institute	Open	5,487.50
8	First Up Consultants	Open	2,210.30
9	Wide World Importers	Open	16,400.00
10	First Up Consultants	Open	3,802.50
11	Wide World Importers	Open	3,900.00
12	First Up Consultants	Open	2,883.00
13	Graphic Design Institute	Open	2,883.00
14	Nod Publishers	Open	3,844.00
15	First Up Consultants	Open	3,900.00
16	Graphic Design Institute	Open	14,144.00
17			107,153.90

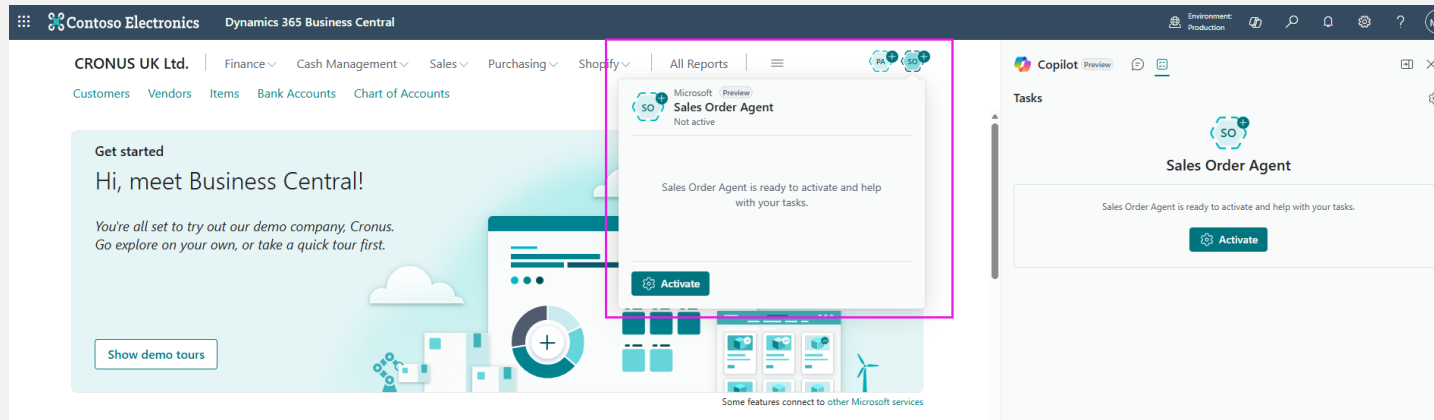
Views: All, Pending Confirmation, Upcoming Orders, Outstanding Purchase Orders, Partially Invoiced, Received Not Invoiced

Filter list by... Filter totals by: Date Filter: ..01/01/27

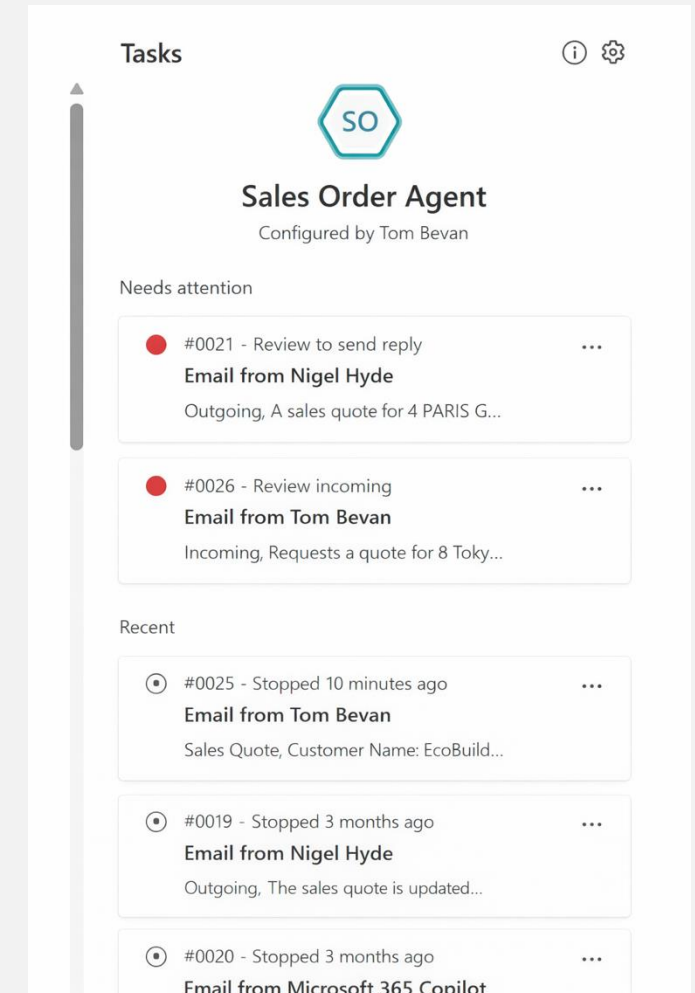
Analysis Assist: Analysis: Show me my open purchase orders with a value of over £1,000. AI-generated content may be incorrect. Keep it / Discard / Add more details about the analysis

Rows: 16 of 29 | Total Rows: 29 | Filtered: 16

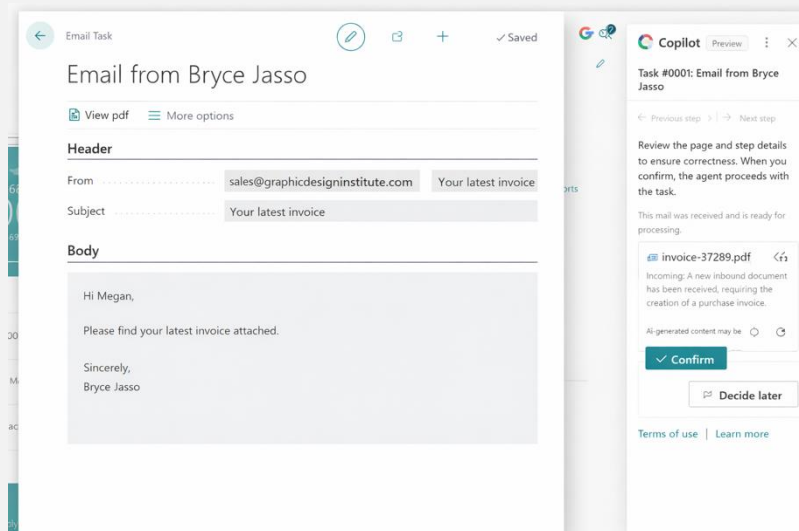
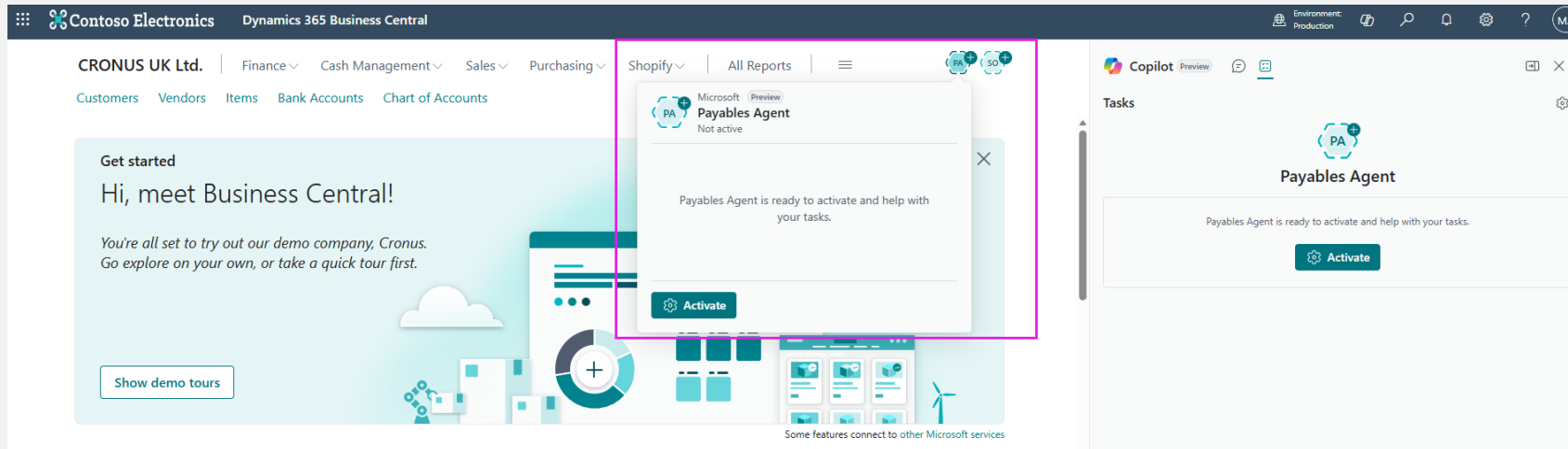
Tip 21: Sales Order Agent



- Reads incoming customer emails
- Validates data
- Automates Sales Order creation



Tip 22: Payables Agent



- Monitors designated mailboxes
- Identifies PDF vendor invoices
- Matches to 'Open' Purchase Orders

Warehouse and Manufacturing Tips

Tips and tricks to help you get the best out of the Warehouse and Manufacturing modules



Tip 23: Document Attachments in Manufacturing

Released Production Order
101004 · Power cord

Home | Print | Order | Actions | Related | Reports | Automate | Fewer options

Change Status... Refresh Production Order... Create Inventory P...ay/Pick/Movement... Create Warehouse Pick Update Unit Cost... Replan...

General Show more

No.	101004	Quantity	1
Description	Power cord	Due Date	1/1/2027
Description 2		Assigned User ID	
Source Type	Item	Blocked	<input type="checkbox"/>
Source No.	SP-BOM1108	Last Date Modified	4/13/2026
Search Description	POWER CORD		

Notes +
(There is nothing to show in this view)

Documents (1) ↓

Name	File Exten
Manufacturing_BOM	pdf

Finished Production Order
101003 · Power cord

Order | Entries | Actions | Related | Automate | Fewer options

General Show less

No.	101003	Quantity	1
Description	Power cord	Due Date	1/1/2027
Description 2		Last Date Modified	4/13/2026
Source Type	Item	Reopened	<input type="checkbox"/>
Source No.	SP-BOM1108	Manual Scheduling	<input type="checkbox"/>
Search Description	POWER CORD		

Lines | Manage | Line

New Line | Delete Line

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Finished Quantity	Unit Cost	Cost Amount
→ SP-BOM1108	1/1/2027	Power cord	12/31/2026 8:00 ...	12/31/2026 11:00...	1	PCS	0	5.99	5.99

Summary Preview

Notes +
(There is nothing to show in this view)

Documents (1) ↓

Name	File Exten
Manufacturing_BOM	pdf

Finished Quantity	Remaining Quantity	Unit Cost	Cost Am
0	1	5.99	

Tip 24: Improved Manufacturing Costing

Manufacturing Setup

Use Inventory Setup page to update Planning fields. Do it now | Don't show me again

General

Normal Starting Time: 8:00:00 AM

Normal Ending Time: 11:00:00 PM

Preset Output Quantity: Expected Quantity

Default Consumption Calculation Based on: Expected Output

Show Capacity In: MINUTES

Planning Warning:

Doc. No. Is Prod. Order No.:

Dynamic Low-Level Code:

Cost Incl. Setup:

Include Non-Inventory Items to Produced Items:

Load SKU Cost on Manufacturing:

Allow Finishing Prod. Order with no Output:

Default General Business Posting Group: [Empty]

Default Flushing Method: Pick + Manual

Value Entries

Find entries... Entry More options

Item Ledger Entry Type	Entry Type	Variance Type	Cost Amount (Actual)	
<input type="radio"/>	Output	Variance	Manufacturing Overhead	15,39
<input type="radio"/>	Output	Variance	Capacity	37,20
<input checked="" type="radio"/>	Output	Variance	Material - Non Inventory	-1,68
<input type="radio"/>	Output	Variance	Material	118,35
<input checked="" type="radio"/>	Output	Direct Cost - Non Inventory		10,50
<input type="radio"/>	Output	Indirect Cost		58,94

BOM Cost Shares

Item Filter: 'SP-SCM1009'

Show Warnings BOM Cost Share Distribution

Type	Description	Qty. per Top Item	Unit of Measure Code	Rolled-up Material Cost	Rolled-up Material Non-Inventory Cost
Item	Airpot	1	PCS	179,51	4,656
Item	Housing Airpot	1	PCS	36,00	
Item	Reservoir Asse...	1	PCS	54,56	1,716
Item	Reservoir	1	PCS	14,90	

Tip 25: Cancel Production Orders

Finished Production Order
101004 · Power cord

Order Entries Actions Related Automate Fewer options

General

- Print Label
- Reopen**
- Create Warehouse Put-Away

No. 101004 Quantity 1

Description Power cord Due Date 1/1/2027

Description 2 Last Date Modified 4/13/2026

Source Type Item Reopened

Source No. SP-BOM1108 Manual Scheduling

Search Description POWER CORD

Summary Preview

Notes +

(There is nothing to show in this view)

Documents (1)

Name File Extension

Manufacturing BOM pdf

Lines Manage Line

Dimensions Routing Components Attachments Item Tracking Lines

Item No.	Due Date	Description	Starting Date-Time	Ending Date-Time	Quantity	Unit of Measure Code	Finished Quantity	Unit Cost	Cost Amount
→ SP-BOM1108	1/1/2027	Power cord	12/31/2026 8:00 A...	12/31/2026 11:00 ...	1	PCS	0	5.99	5.99

Reopen Finished Production Orders

Reverse entries

Released Production Order 101001 ATHENS Desk

Item Ledger Entries Find entries... Entry Order Tracking Application Worksheet

Actions Automate Fewer options

Functions Reverse Production Entry...

Other Other

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Department Code	Quantity	Invoiced Quantity	Remaining Quantity
1/1/2027	Output		101001	1896-S			-20	0	0

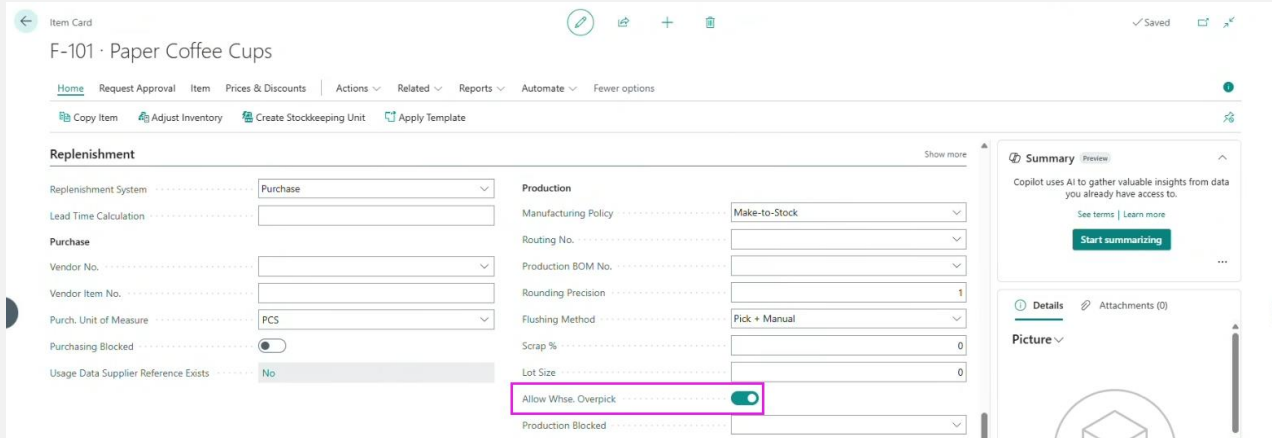
Released Production Order 101001 ATHENS Desk

Item Ledger Entries Find entries... Entry Order Tracking Application Worksheet

Actions Automate Fewer options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Department Code	Customergro... Code	Location Code	Quantity	Invoiced Quantity	Remaining Quantity
1/1/2027	Output		101001	1896-S					-20	0	0
1/1/2027	Output		101001	1896-S					20	20	0

Tip 26: Over Picking



Once enabled on the Item Card...

...change the value in the Quantity field for the Take line.

Lines | [Manage](#) | Functions | Line

Delete Line

Action Type	Item No.	Description	Bin Code	Quantity	Qty. to Handle
Take	SP-BOM1101	Housing Airpot	W-01-0001	7	7
Place	SP-BOM1101	Housing Airpot	W-07-0002	7	7
Take	SP-BOM1102	Coffee filter basket	W-01-0002	7	7
Place	SP-BOM1102	Coffee filter basket	W-07-0002	7	7
Take	SP-BOM1103	Foot, adjustable, rubber	W-02-0002	50	28
Place	SP-BOM1103	Foot, adjustable, rubber	W-07-0002	28	28

Tip 27: Transfer Routes

Transfer Routes

Options

Show In-Transit Code Column Set EAST.YELLOW

Show Transfer-to Name

Transfer-from Code †	Transfer-from Name	EAST	MAIN	SILVER	WEST	WHITE	YELLOW
EAST	East Warehouse	--	--	IN-TRANSIT	--	--	--
MAIN	Main Warehouse	OWN LOG.	--	--	--	--	--
SILVER	Silver Warehouse	--	--	--	--	--	--
WEST	West Warehouse	--	OWN LOG.	--	--	--	--
→ WHITE	White Warehouse - Adv.	--	--	--	IN-TRANSIT	--	--
YELLOW	Yellow Warehouse	--	--	--	--	--	--

Map out a route in the Transfer Routes Matrix

Correct 'In-Transit' Code will automatically populate

Transfer Order 1004

General

Transfer-from Code MAIN In-Transit Code OWN LOG.

Transfer-to Code EAST Posting Date 01/01/2027

Direct Transfer

Lines

Item No.	Description	Quantity	Reserved Quantity Inbnd.	Reserved Quantity Shipped	Reserved Quantity Outbnd.	Unit of Measure Code	Qty. to Ship	Quantity Shipped	Qty. to Receive
→									

Tip 28: Item Availability by Pages

Item Card

SP-BOM1305 · Screw Hex M3, Zinc

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

Attachments Approvals Phys. Inventory Ledger Entries Marketing Text Attributes Items by Location Subscription Packages

Statistics Comments Dimensions

Item Availability by

- Event
- BOM Level
- Period
- Variant
- Location
- Lot
- Unit of Measure

No. SP-BOM1305

Description Screw Hex M3, Zinc

Blocked

Type Inventory

Base Unit of Measure PCS

Last Date Modified 04/02/2026

GTIN

Item Category Code

Service Item Group

Automatic Ext. Texts

Common Item No.

Purchasing Code

Variant Mandatory if Exists

Matrix overview of Item Availability by Location

Item Availability by Location

SP-BOM1305 · Screw Hex M3, Zinc

Previous Period Next Period More options

Options

View by Day Date Filter 01/01/27

View as Net Change

Lines

Code	Name	Gross Requirement	Scheduled Receipt	Planned Receipt	Inventory	Projected Available Balance	Planned Order Releases
→	(Unspecified Location)	0	0	0	0	0	0
EAST	East Warehouse	30	0	0	1,000	970	0
IN-TRANSIT	In-Transit	0	0	0	0	0	0
MAIN	Main Warehouse	0	0	0	1,500	1,500	0
OUT. LOG.	Outsourced Logistics	0	0	0	0	0	0
OWN LOG.	Own Logistics	0	0	0	0	0	0
SILVER	Silver Warehouse	100	0	0	200	100	0
WEST	West Warehouse	0	0	0	750	750	0
WHITE	White Warehouse - Adv.	500	0	0	0	-500	0
YELLOW	Yellow Warehouse	0	0	0	0	0	0

Tip 29: Maintain Accurate Lead Times

Item Card

SP-BOM1305 · Screw Hex M3, Zinc

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

Attachments Approvals Phys. Inventory Ledger Entries Marketing Text Attributes Items by Location Subscription Packages

Statistics Comments Dimensions Item Availability by Structure Cost Shares Substitutions

Replenishment

Replenishment System: Purchase

Lead Time Calculation: 10D

Purchase

Vendor No.: 10000

Vendor Item No.: 22222

Purch. Unit of Measure: PCS

Purchasing Blocked:

Usage Data Supplier Reference Exists: No

Production

Manufacturing Policy: Make-to-Stock

Routing No.:

Production BOM No.:

Rounding Precision:

Flushing Method:

Scrap %:

Lot Size:

Lead times are used in replenishment calculations and to determine pricing, this is important!

Vendor Card

40000 · Wide World Importers

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

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

General

Wide World Importers

Address & Contact

M22 5TG toby.rhode@contoso.com Toby Rhode

Invoicing

Payments

CM

Receiving

Location Code:

Shipment Method Code:

Lead Time Calculation: 45D

Base Calendar Code:

Customised Calendar: No

Over-Receipt Code:

Receive E-Document To: Purchase Order

E-Document Service Participation: 0

Finance Tips

Tips and tricks for Finance ...



Tip 30: Match Purchase Invoices to Multiple Lines

Purchase Invoice

107211 - Graphic Design Institute

- Explode BOM
- Insert Ext. Texts
- Get Receipt Lines...
- Get Order Lines...**
- Redistribute Account Allocations
- Generate lines from Allocation Account Line
- Assign Contract Line

More options

Status: Open

Type	No.	Item Reference No.	Description/Comment	Attach to Subcontract line
→ Item	:	1968-S	MEXICO Swivel Chair, black	No
Item		1972-S	MUNICH Swivel Chair, yellow	No
Item		1996-S	ATLANTA Whiteboard, base	No

Purchase Invoice

107223 - First Up Consultants

Purchase Lines

Document Type	Document No.	No.	Description	Loc... Code	Quantity	Resen.
<input checked="" type="checkbox"/>	106043	1980-S	MOSCOW Swivel Chair, red		22	
<input checked="" type="checkbox"/>	106043	1968-S	MEXICO Swivel Chair, black		21	
<input checked="" type="checkbox"/>	106043	1929-W	Conference Bundle 1-8		20	
<input checked="" type="checkbox"/>	106042	1908-S	LONDON Swivel Chair, blue		11	
→ <input checked="" type="checkbox"/>	:	1896-S	ATHENS Desk		10	
<input type="checkbox"/>	106038	1936-S	BERLIN Guest Chair, yellow		3	
<input type="checkbox"/>	106025	GRH-1001	Smart Grind Home		10	

OK Cancel

Tip 31: Correct/Cancel Invoices

Posted Sales Invoice

103297 · Adatum Corporation

Home | Print/Send | Invoice | Incoming Document | More options

Update Document | **Correct** | Find entries... | Track Package | Change Payment Service

General >

103297 | Adatum Corporation | 28/02/2026 | 101001 | No

Lines | Manage

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Line Discount %	Line Amount Excl. VAT	Deferral Code
→ Item	1996-S		ATLANTA Whiteboard, base	12	PCS	906.70		10,880.40	

Invoice Discount Amount Excl. VAT 0.00 Total VAT (GBP) 2,176.08

Total Excl. VAT (GBP) 10,880.40 Total Incl. VAT (GBP) **13,056.48**

Invoice Details > 04/02/2026 1M(8D)

Summary Preview

Details | Attachments (5)

Documents (5)


Name	File Exten
Excel - Copy	xlsx
Excel	xlsx
Word - Copy	docx
Word	docx
1306 Sales - Invoice 103297	pdf


Notes +



(There is nothing to show in this view)

Tip 32: Calendar Short Dates and Times

Entry	Interpretation
2022.12.31.	2022.12.31.
221231	2022.12.31.
22.12.31.	2022.12.31.
22.12.31.	2022.12.31.
20221231	2022.12.31.
22/12,31	2022.12.31.
11	work date year.work date month.11.
1112	work date year.11.12.
t or today	today's date
p4	date range that includes the fourth accounting period, such as 04/01/20..04/30/20
w or work date	the working date
m or Monday	Monday of the work date week
tu or Tuesday	Tuesday of the work date week
sa or Saturday	Saturday of the work date week
s or Sunday	Sunday of the work date week
t23	Tuesday of week 23 of the work date year
t 23	Tuesday of week 23 of the work date year
t-1	Tuesday of week 1 of the work date year

Posted Sales Invoices: All 

Views 

***All**  

Recurring Billing


Unpaid


Paid


Cancelled



From Shopify

Filter list by:

 Posting Date

Posted Sales Invoices: All 

Views 

***All**  

Recurring Billing


Unpaid


Paid

Cancelled

From Shopify

Filter list by:

 Posting Date

 Filter...

Tip 33: Preview Posting

Sales Order

101016 · Adatum Corporation

Home Prepare Print/Send Request Approval Order More options

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

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

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

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 %	Line Amount Excl. VAT	Subscription Lines	Customer Subscription Contract No.
Item	1996-S		ATLANTA Whiteboard, base		12		-	PCS	906.70		10,880.40	0	-
→ Item	1906-S		ATHENS Mobile Pedestal		5		-	PCS	281.40		1,407.00	0	-

← Posting Preview

Show Related Entries

Related Entries	No. of Entries
G/L Entry	7
Cust. Ledger Entry	1
Item Ledger Entry	2
VAT Entry	1
Detailed Cust. Ledg. Entry	1
Value Entry	2

Tip 34: Related Table Data Analysis

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

Customers: All | Analysis 1

No.	Name	Responsibility...	Location Code	Phone No.	Contact	All...	Balance (LCY)
1	10000	Adatum Corporation			Robert Townes	No	14,835.
2	20000	Trey Research			Helen Ray	No	2,251.
3	30000	School of Fine Art			Meagan Bond	No	32,644.
4	40000	Alpine Ski House			Ian Deberry	No	2,617.
5	50000	Relecloud			Jesse Homer	No	6,491.
6							58,840.

Context menu options: Rename, Duplicate, Add columns from, Copy link, Open in Excel, Arrange, Delete, Delete all.

Columns: No., Name, Responsibility Centre, Location Code, Phone No., Contact, Allow Multiple Posting..., Balance (LCY), Balance Due (LCY), Sales (LCY), Payments (LCY), Coupled to Dataverse.

Note 'Contact' is smaller, this indicates this data is from a related table!

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

Customers: All | Analysis 1

No.	Name	Responsibility...	Contact	Contact, via: Primary Conta... E-Mail	Location Code	Phone No.
1	10000	Adatum Corporation	Robert Townes	robert.townes@contoso.com		
2	20000	Trey Research	Helen Ray	helen.ray@contoso.com		
3	30000	School of Fine Art	Meagan Bond	meagan.bond@contoso.com		
4	40000	Alpine Ski House	Ian Deberry	ian.deberry@contoso.com		
5	50000	Relecloud	Jesse Homer	jesse.homer@contoso.com		

Columns: No., Name, Responsibility Centre, Contact, E-Mail [Contact, via: Pri..., Location Code, Phone No., Allow Multiple Posting..., Balance (LCY), Balance Due (LCY), Sales (LCY), Payments (LCY), Coupled to Dataverse.

Tip 35: Use Drill-Down Everywhere

Item Ledger Entries

Find entries... Entry Order Tracking Application Worksheet More options

Posting Date ↓	Entry Type	Document Type	Document No.	Item No.	Description	Department Code	Customergro... Code	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invntbl)	Open
06/04/2026	Purchase	Purchase R...	107224	CC-1000					1	1	0	0.00	0.00	240.00	<input type="checkbox"/>
01/04/2026	Sale	Sales Ship...	102198	2000-S		SALES	LARGE		-8	-8	0	986.40	-768.80	0.00	<input type="checkbox"/>
01/04/2026	Sale	Sales Ship...	102198	1960-S		SALES	LARGE		-2	-2	-2	250.20	-195.00	0.00	<input checked="" type="checkbox"/>
01/04/2026	Transfer	Transfer Re...	109001	1968-S				WEST	1	1	1	0.00	96.10	0.00	<input checked="" type="checkbox"/>
01/04/2026	Transfer	Transfer Re...	109001	1968-S				OUT. LOG.	-1	-1	0	0.00	-96.10	0.00	<input type="checkbox"/>
01/04/2026	Transfer	Transfer Shi...	108001	1968-S				OUT. LOG.	1	1	0	0.00	96.10	0.00	<input type="checkbox"/>
01/04/2026	Transfer	Transfer Shi...	108001	1968-S				MAIN	-1	-1	0	0.00	-96.10	0.00	<input type="checkbox"/>
31/03/2026	Sale	Sales Ship...	102197	1988-S		SALES	MEDIUM		-5	-5	0	625.50	-487.50	0.00	<input type="checkbox"/>
31/03/2026	Sale	Sales Ship...	102197	1920-S		SALES	MEDIUM		-3	-3	0	1,261.20	-984.00	0.00	<input type="checkbox"/>

Item Card

1896-S · ATHENS Desk

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

Copy Item Adjust Inventory Create Stockkeeping Unit Apply Template

Costs & Posting

Cost Details

Costing Method: FIFO

Standard Cost: 506.60

Unit Cost: 506.60

Net Invoiced Qty: -50

Cost is Adjusted:

Purchase Prices & Discounts: Create New...

Posting Details

Gen. Prod. Posting Group

Inventory Posting Group

Default Deferral Template

Foreign Trade

Commodity Code

Customer Card

10000 · Adatum Corporation

Home Request Approval New Document Prices & Discounts Customer Report More options

Contact Apply Template Merge With... Send Email

General

No.: 10000

Name: Adatum Corporation

IC Partner Code

Balance (LCY): 13,056.48

Balance (LCY) As Vendor: 0.00

Balance Due (LCY): 13,056.48

Credit Limit (LCY): 0.00

Blocked

Responsibility Centre

Service Zone Code

Document Sending Profile: DIRECTFILE

Total Sales - Fiscal Year: 0.00

Costs (LCY): 0.00

Profit (LCY): 0.00

Profit %: 0.0

Last Date Modified: 04/02/2026

If it's blue, you can drill down!

Sandbox and Admin Centre Tips

Tips and tricks for utilising your
Admin Centre and Sandbox
environments



Tip 36: Testing and Troubleshooting

The screenshot shows the Dynamics 365 Business Central admin center interface. The top navigation bar includes the Contoso Electronics logo and the text "Dynamics 365 Business Central admin center". The left sidebar contains navigation options: Environments, Notification Recipients, Microsoft Entra Apps, Telemetry, Reported Outages, Operations, and Capacity. The main content area is titled "Environments" and features a table with the following data:

Name	Application Fa...	Type	State	Country/r...	Current Version	Next Update	Scheduled Updat...	Security Group
Production	Business Central	Production	Active	GB	27.5	28.0	13 May 2026	Not Set
Sandbox16032026	Business Central	Sandbox	Active	GB	27.5	28.0	13 May 2026	Not Set
UserDaySandbox	Business Central	Sandbox	Active	GB	27.5	28.0	13 May 2026	Not Set

Below the table is an "Essentials" section with two widgets:

- Service health:** 0 incidents or advisories.
- Message center:** 0 unread messages. Includes "Show all" and "Preferences" buttons.

Tip 37: Capacity Checker

Dynamics 365 Business Central admin center ? U

- Environments
- Notification Recipients
- Microsoft Entra Apps
- Telemetry
- Reported Outages
- Operations
- Capacity**

Capacity

Storage capacity usage [?](#) Last updated date: 28/04/2026, 16:15:53 | Refresh

Database

179.52 of 152.00 GB used 27.52 GB over

Storage capacity, by source [?](#)

Source	Database ...
Org (tenan...	80.00
User licenses	72.00
Additional ...	0.00
Total	152.00


Environment quota usage

Quota of environments

Environment	Used	Available
Production	1 of 1 used	0 available
Sandbox	2 of 3 used	1 available

Tip 38: Sandbox Preview Updates

Environments > Sandbox16032026

Details				Active  App hotfix Scheduled
Name Sandbox16032026	Application Family Business Central	Country/region GB	Azure Region United Kingdom	
Type Sandbox	Partner Access (?) All Partners (Modify)	Security Group Not Set (Define)	Access with Microsoft 365 Licenses (?) Off (Modify)	
Telemetry (?) Not Set (Define)		URL https://businesscentral.dynamics.com/7b447cf9-3ff8-4520-ac2c-56345a4ff4c8/Sandbox16032026		

Update Settings			
Application Version 27.4	Latest Available Version 28.0 (Preview)	Next Update To 27.5 on Mar 30, 2026 (Modify)	Update to next major before Sep 01, 2026
Update Window (UTC+00:00) (?) 08:00 PM - 06:00 AM (Modify)		Apps Update Cadence Default (Modify)	

Linked Power Platform Environment			
Environment (?) Not Set (Link)	Customer Lockbox (?) Not Set	Customer-managed Encryption Key (?) Not Set	Billing Policy (?) Not Set

Update manually or, define the date you would like the environment to update automatically.


Schedule environment update


Sandbox16032026

Visit [Business Central Updates](#) to find out more about the update roll-out process.

Select a target version for this environment's next update. You can pick any later version within the current and next major version, even if the target version is not yet available.


Target version:


28.0 (Preview) | Available 

 You have selected a preview target version. Environments on preview versions can't be updated after the version becomes generally available or a newer preview version is released. They are automatically deleted when the preview period ends. [Learn more](#). By using preview, you agree to the [preview terms](#). The update must be scheduled to run before Apr 01, 2026 01:00 AM (UTC+01:00).

Select a date to schedule the update of this environment. The update will occur within the time frame defined in the update window settings for the environment. Or you can choose to allow the update to run outside the update window.

Update Date:

Mar 16, 2026 

 The chosen update date applies to your local time zone as detected by the browser. The update window for the environment in your local time is: 08:00 PM - 06:00 AM (UTC+-00:00)

Allow the update to run outside the update window

No

[Schedule update](#) [Cancel](#)

Tip 39: Extended Update Window

The screenshot shows the Dynamics 365 Business Central admin center interface. The left sidebar contains navigation options: Environments, Notification Recipients, Microsoft Entra Apps, Telemetry, Reported Outages, Operations, and Capacity. The main content area displays the 'Production' environment details, including application family, type, and update settings. A 'Schedule environment update' dialog is open on the right, showing a list of target versions (28.0 to 28.4) and a date picker set to May 06, 2026. The dialog also includes a toggle for 'Allow the update to run outside the update window' and 'Schedule update' and 'Cancel' buttons.

Environments > Production

Details

Name Production	Application Family Business Central	Country/region GB
Type Production	Partner Access [?] All Partners (Modify)	Security Group Not Set (Define)
Telemetry [?]		URL https://businesscentral.dynamics.com/63d29c (Modify)

Update Settings

Application Version 27.5	Latest Available Version 28.0	Next Update To 28.0 on May 06, 2026 (Modify)
Update Window (UTC+01:00) [?] 12:00 AM - 08:30 AM (Modify)		Apps Update Cadence Default (Modify)

Linked Power Platform Environment

Environment [?] N4 [?] (Unlink)	Customer Lockbox [?] Not Set	Customer-managed Encryption Key [?] Not Set [?]
--	---	--

Schedule environment update

Production

Visit [Business Central Updates](#) to find out more about the update roll-out process.

Select a target version for this environment's next update. You can pick any later version within the current and next major version, even if the target version is not yet available.

Target version:

28.0 | Scheduled

28.0 | Scheduled

28.1 | Planned for May 2026

28.2 | Planned for June 2026

28.3 | Planned for July 2026

28.4 | Planned for August 2026

May 06, 2026

Allow the update to run outside the update window

No

[Schedule update](#) [Cancel](#)

Tip 40: Unified Extension Management

Dynamics 365 Business Central admin center

Environments > Manage apps

Environment: Production-Business Central

App Type: Global

Refresh

Name	Publisher	App Type	Installed Version	Latest Availabl...	Available Update Action	Available Uninstall Act...
AMC Banking 365 Fundament	Microsoft	Global	27.5.46862.46929		Up to Date	Uninstall
API - Cross Environment Inter	Microsoft	Global	27.5.46862.47988		Up to Date	Uninstall
API Reports - Finance	Microsoft	Global	27.5.46862.46929		Up to Date	Uninstall
Application	Microsoft	Global	27.5.46862.46929		Up to Date	N/A
Audit File Export	Microsoft	Global	27.5.46862.46929		Up to Date	Uninstall
Bank Account Reconciliation V	Microsoft	Global	27.5.46862.46929		Up to Date	Uninstall
Base Application	Microsoft	Global	27.5.46862.47988		Up to Date	N/A
Business Central Cloud Migrat	Microsoft	Global	27.5.46862.46929		Up to Date	Uninstall
Business Central Cloud Migrat	Microsoft	Global	27.5.46862.46929		Up to Date	Uninstall
Business Central Intelligent Cl	Microsoft	Global	27.5.46862.46929		Up to Date	Uninstall
Business Foundation	Microsoft	Global	27.5.46862.46929		Up to Date	N/A
CS Transfer Management	Central Solutions	Global	27.0.0.0	27.1.0.4	Install update	Uninstall

BONUS TIP: Master Data Sync

Master Data Management Setup

Start Initial Synchronisation Synchronisation Tables Synch. Job Queue Entries Actions Automate Fewer options

Connection

Source Company Cronus Homestore Ltd

Enable Data Synchronisation

Synchronisation Tables ✓ Saved

+ New Edit List Delete Fields Synchronisation Log

Status	Table	Overw... Local Change	Synchronise Changes Since	Source Table Filter
Enabled	Customer	<input type="checkbox"/>	27/04/2026 00:00	<Edit table filter>
→ Disabled	G/L Account	<input type="checkbox"/>		
Disabled	Dimension	<input type="checkbox"/>		
Disabled	VAT Product Posting Group	<input type="checkbox"/>		
Disabled	VAT Area	<input type="checkbox"/>		
Disabled	VAT Group	<input type="checkbox"/>		
Disabled	IC G/L Account	<input type="checkbox"/>		
Disabled	G/L Account Category	<input type="checkbox"/>		
Disabled	Cost Type	<input type="checkbox"/>		
Disabled	Cost Centre	<input type="checkbox"/>		
Disabled	Cost Object	<input type="checkbox"/>		
Disabled	Cost Budget Name	<input type="checkbox"/>		
Disabled	Deferral Template	<input type="checkbox"/>		
Disabled	IC Dimension	<input type="checkbox"/>		
Disabled	Sustainability Account	<input type="checkbox"/>		
Disabled	Sustainability Account Category	<input type="checkbox"/>		
Disabled	Sustainability Account Subcategory	<input type="checkbox"/>		
Disabled	Responsibility Centre	<input type="checkbox"/>		
Disabled	Country/Region	<input type="checkbox"/>		
Disabled	Location	<input type="checkbox"/>		
Disabled	Bin	<input type="checkbox"/>		

Thank You.

www.node4.co.uk

moreinfo@node4.co.uk



Loved it? Learned something? Had opinions?

Head to the app and share your thoughts - stars and honesty encouraged

