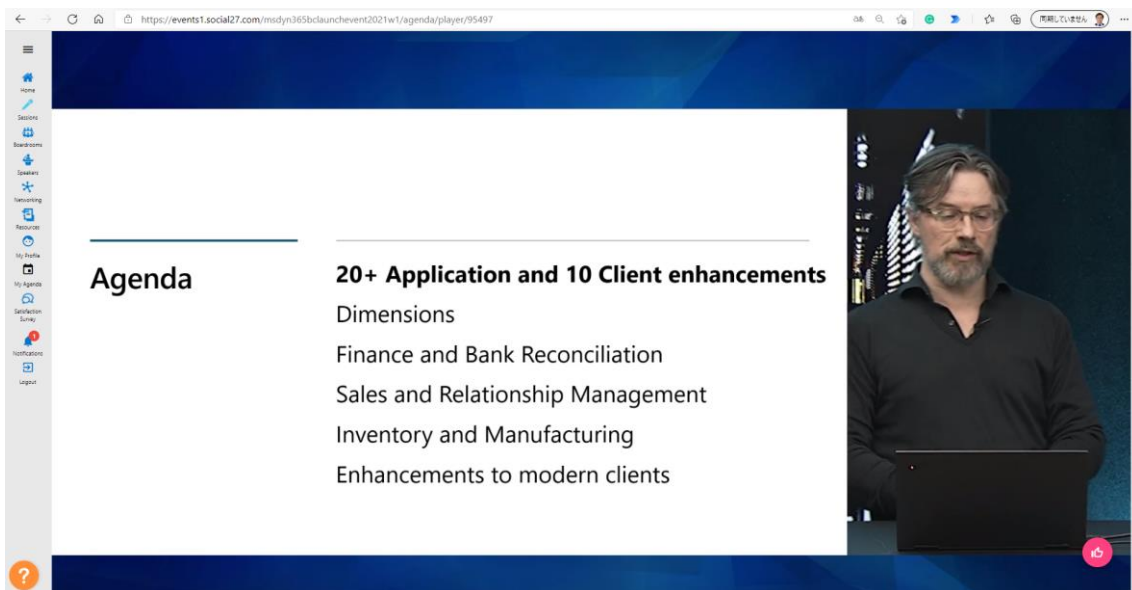
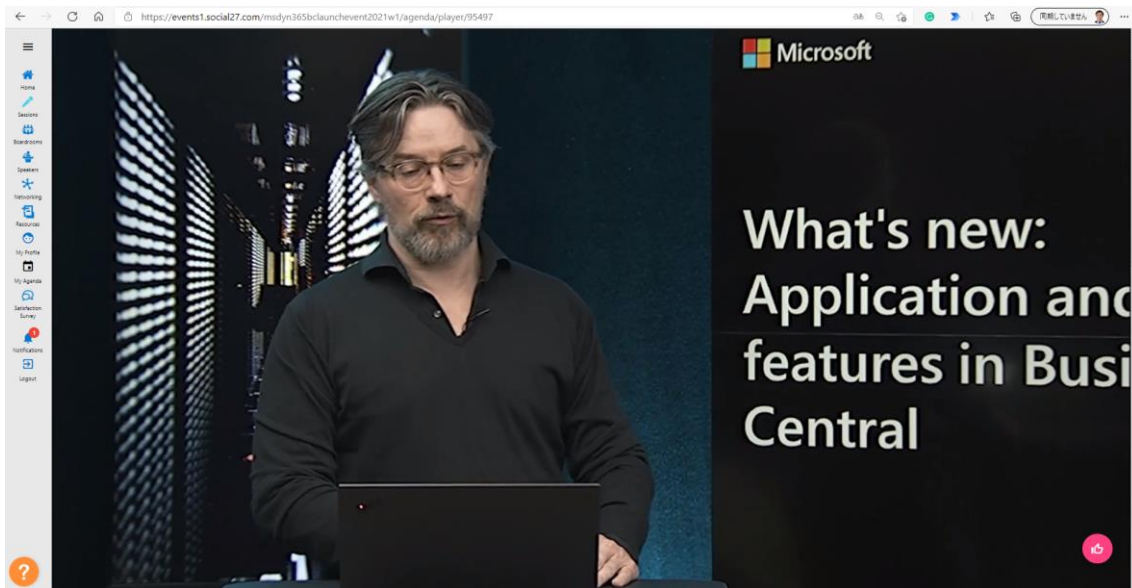



Application and client features



https://events1.social27.com/msdyn365bclaunchevent2021w1/agenda/player/95497

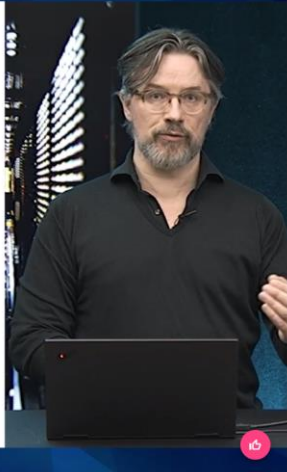


Dimensions improvements




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Logout

?

https://events1.social27.com/msdyn365bclaunchevent2021w1/agenda/player/95497



Dimension improvements

-  Use shortcut dimensions in entries for financial reporting
-  More control over settings for Default Dimensions
-  Dimension corrections (for G/L entries)

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https://events1.social27.com/msdyn365bclaunchevent2021w1/agenda/player/95497

Use shortcut dimensions in entries for financial reporting

The largest purchase invoice was for \$1,906

General Ledger Setup

General Ledger Setup

General: Posting, Tax, Bank, Journal Templates, More options

Dimensions:

- Shortcut Dimension 1: Department
- Shortcut Dimension 2: G/L Account
- Shortcut Dimension 3: G/L Account
- Shortcut Dimension 4: G/L Account
- Shortcut Dimension 5: Other

Background Posting:

Reporting:

Application:

https://events1.social27.com/msdyn365bclaunchevent2021w1/agenda/player/95497

Use shortcut dimensions in entries for financial reporting

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General: Posting, Tax, Bank, Journal Templates, More options

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- Shortcut Dimension 3: G/L Account
- Shortcut Dimension 4: G/L Account
- Shortcut Dimension 5: Other

Background Posting:

Reporting:

Application:

General Ledger Entries

Posting Date: 3/1/2020

Posting Date	Department Code	Shortcut Dimension 1	Gen. Post. Posting Group	Gen. Post. Posting Group	Amount	Bal. Account Type	Bal. Account No.	Entry No.	External Document No.	Area Code
3/1/2020		Purchase	1,000.00	G/L Account	4250					
2/1/2020		Purchase	1,000.00	G/L Account	4244					
1/1/2020		Purchase	1,000.00	G/L Account	4238					
12/1/2019		Purchase	1,000.00	G/L Account	4277					
11/1/2019		Purchase	1,000.00	G/L Account	4274					
10/1/2019		Purchase	1,000.00	G/L Account	4271					
9/1/2019		Purchase	1,000.00	G/L Account	4268					
8/1/2019		Purchase	1,000.00	G/L Account	4265					
7/1/2019		Purchase	1,000.00	G/L Account	4262					
6/1/2019		Purchase	1,000.00	G/L Account	4259					

Area Code: Specify the code for Shortcut Dimension 3, which is one of the dimension codes that you set up in the General Ledger Setup window. Learn more

https://events1.social27.com/msdyn365blaunchevent2021w1/agenda/player/95497

More control over settings for Default Dimensions

The screenshot shows the Dynamics 365 Business Central interface. The main window displays the 'Default Dimensions' dialog for 'Customer 10000'. A purple box highlights the 'Allowed Dimension Values' field, which is currently set to 'All'. To the right, a video feed shows a man with glasses and a beard sitting at a desk with a laptop.

https://events1.social27.com/msdyn365blaunchevent2021w1/agenda/player/95497

More control over settings for Default Dimensions

The screenshot shows the Dynamics 365 Business Central interface. The main window displays the 'Allowed Dimension Values' dialog for 'Customer 10000'. A purple box highlights the 'Allowed' column, which contains checkboxes for various dimension values. To the right, a vertical stack of social media sharing icons is visible.

Dimension Value Code	Dimension Value Name	Allowed
10	Europe	<input type="checkbox"/>
20	Europe North	<input type="checkbox"/>
30	Europe North (EU)	<input type="checkbox"/>
40	Europe North (Non EU)	<input type="checkbox"/>
50	Europe North, Total	<input type="checkbox"/>
60	Europe South	<input type="checkbox"/>
70	Europe, Total	<input type="checkbox"/>
80	America	<input type="checkbox"/>
90	America North	<input type="checkbox"/>
00	America South	<input type="checkbox"/>
10	America, Total	<input type="checkbox"/>

Dimension corrections (for G/L entries)

Dynamic 365 Business Central

G/L Registers | Work Date: 4/12/2021

Search Process Report **Reverse** Page More options

Reverse Register... Connect Dimensions

REG	3/18/2021	10:44:22 AM	RCBUILD100000750CCALL... INVTRCDIST	4292	4295	0	0
846	3/18/2021	10:44:22 AM	RCBUILD100000750CCALL... INVTRCDIST	4288	4291	0	0
845	3/18/2021	10:44:20 AM	RCBUILD100000750CCALL...	4234	4287	0	0
844	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4232	4233	0	0
843	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4230	4231	0	0
842	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4228	4229	0	0
841	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4226	4227	0	0
840	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4224	4225	0	0
839	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4222	4223	0	0
838	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4220	4221	0	0
837	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4218	4219	0	0
836	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4216	4217	0	0
835	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4214	4215	0	0
834	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4212	4213	0	0
833	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4210	4211	0	0
832	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4208	4209	0	0
831	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4206	4207	0	0
830	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4204	4205	0	0
829	3/18/2021	10:44:19 AM	RCBUILD100000750CCALL... DEFAULT	4202	4203	0	0
828	3/18/2021	10:44:18 AM	RCBUILD100000750CCALL... PURCHASES	4197	4201	0	0
827	3/18/2021	10:44:18 AM	RCBUILD100000750CCALL... INVTRCDIST	4195	4196	0	0
826	3/18/2021	10:44:18 AM	RCBUILD100000750CCALL... PURCHASES	4190	4194	0	0
825	3/18/2021	10:44:18 AM	RCBUILD100000750CCALL... INVTRCDIST	4188	4189	0	0
824	3/18/2021	10:44:18 AM	RCBUILD100000750CCALL... PURCHASES	4183	4187	0	0

Dimension corrections (for G/L entries)

Dynamic 365 Business Central

Draft Dimension Correction | Work Date: 4/12/2021

Correcting Dept, ADM to SALES

Run Reopen Validate Dimension Changes Show Errors Page

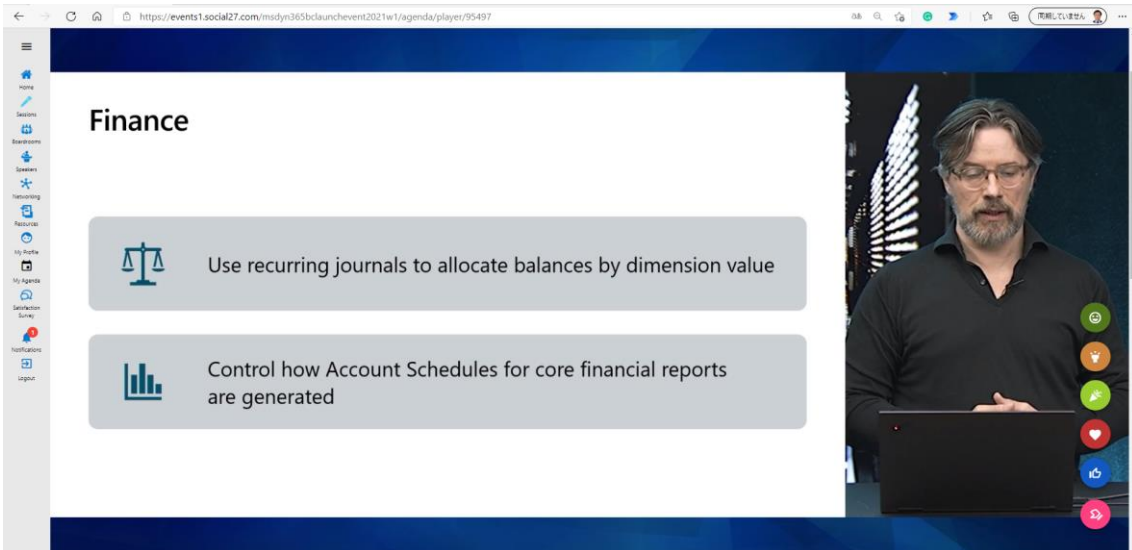
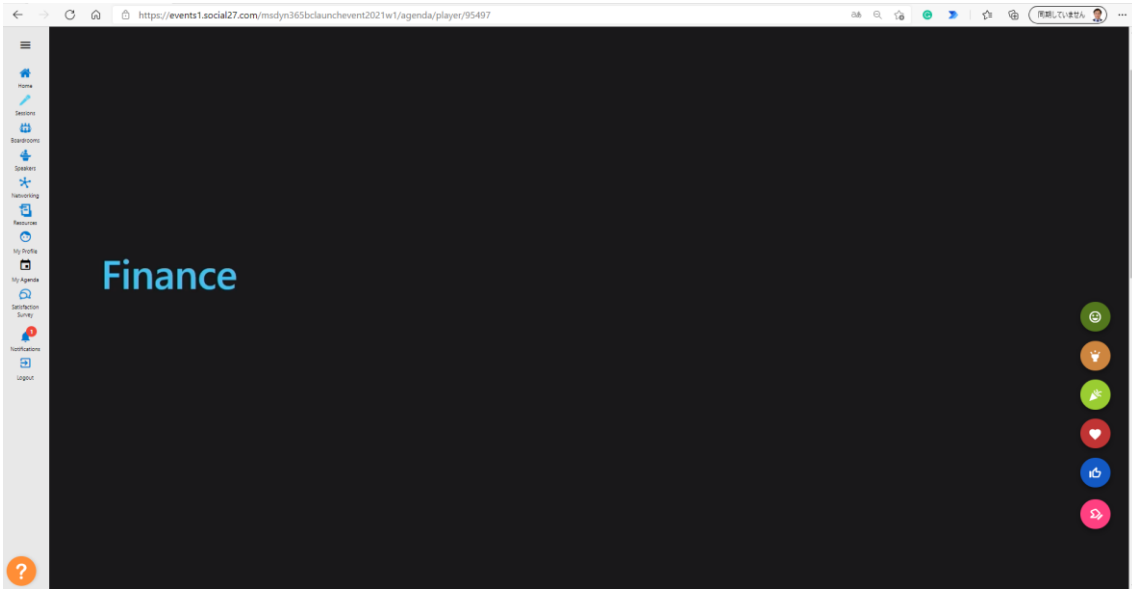
Description: Correcting Dept, ADM to SALES Status: Draft Update Analysis Views:

Dimension Correction Changes | Manage

Dimension Code 1	Dimension Value Code	New Dimension Value Code
AREA	Multiple - Number of different values (2)	No Change
BUSINESSGROUP	Multiple - Number of different values (3)	No Change
CUSTOMERGROUP	Multiple - Number of different values (3)	No Change
DEPARTMENT	ADM	Change - SALES

Selected Ledger Entries | Manage

Entry No. 1	Posting Date	Document Type	Document No.	G/L Account No.	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Bal. Account Type	Bal. Account No.	External Document No.
4298	7/1/2021	1000	61402	61400	Office Supplies Expense	Purchase			Bank Account	CHECKING	
4297	7/1/2021	1000	10100	61400	Office Supplies Expense				G/L Account	61400	
4296	7/1/2021	1001	61400	61400	Office Supplies Expense	Purchase			Bank Account	CHECKING	
4295	7/1/2021	1001	10100	61400	Office Supplies Expense				G/L Account	61400	
4300	7/1/2021	1002	61400	61400	Office Supplies Expense	Purchase			Bank Account	CHECKING	
4301	7/1/2021	1002	10100	61400	Office Supplies Expense				G/L Account	61400	



https://events1.social27.com/msdyn365blaunchevent2021w1/agenda/player/95497

Use recurring journals to allocate balances by dimension value

Batch Name: DEFAULT

Manage Post/Print Line Account Open in Excel More options

Set Dimension Filter Allocations Dimensions

Let a filter that can be used with the RD Balance by Dimension or RBD Reversing Balance by Dimension recurring method. When applied, it will get the balance by dimension from general ledger entries.

Recurring Method	Recurring Frequency	Posting Date	Document Type	Document No.	Account Type	Account No.	Description	Gen. Posting Type
RD Balance by Dimension	RM	4/12/2021		000001	GL Account	10500	Prepaid Rent	

Recurring Method Filter:

- F Fixed
- V Variable
- B Balance
- RF Reversing Fixed
- RV Reversing Variable
- RB Reversing Balance
- RD Balance by Dimension
- RBD Reversing Balance by Dimension

https://events1.social27.com/msdyn365blaunchevent2021w1/agenda/player/95497

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Recurring Method	Recurring Frequency	Posting Date	Document Type	Document No.	Account Type	Account No.	Description	Gen. Posting Type
RD Balance by Dimension	RM	4/12/2021		000001	GL Account	10500	Prepaid Rent	

Recurring Method Filter:

- F Fixed
- V Variable
- B Balance
- RF Reversing Fixed
- RV Reversing Variable
- RB Reversing Balance
- RD Balance by Dimension
- RBD Reversing Balance by Dimension

Set Dimension Filter Dialog:

Dimension List: [Empty]

Dimension Value: [Empty]

OK Cancel

Control how Account Schedules for core financial reports are generated

The screenshot displays the Dynamics 365 Business Central interface. A central dialog box is open, titled 'Generate Account Schedules'. The dialog contains the following text:

How do you want to generate standard account schedules?

- Keep existing account schedules and create new ones.
- Overwrite existing account schedules.

Buttons for 'OK' and 'Cancel' are visible at the bottom of the dialog. In the background, a table of account categories is visible, including sections for Current Assets, Fixed Assets, Liabilities, and Equity.

Bank Reconciliation

The screenshot shows a presentation slide titled 'Bank Reconciliation'. The slide features a man with a beard and glasses, wearing a dark shirt, standing behind a laptop. The background is dark blue with a white grid pattern. The slide is part of a video player, as indicated by the URL and navigation icons.

https://events1.social27.com/msdyn365blaunchevent2021w1/agenda/player/95497

Bank Reconciliation

- Payment reconciliation journal improvements
- Bank reconciliation improvements
- Simplified bank statement file import

https://events1.social27.com/msdyn365blaunchevent2021w1/agenda/player/95497

Payment reconciliation journal improvements

Dynamics 365 Business Central

Payment Reconciliation Journal | Work Date: 7/3/2021

Match	Transaction Date	Transaction Text	Transaction Amount	Applied Amount	Difference	Document No.	Description	Due Date	Account Name	Account Type	Account No.	Doc. Code
Medium	3/11/2021	107196	-2,214.13	-2,214.13		108196	Invoice 107196	3/31/2021	First Up Consultants	Vendor	20000	
Low	3/11/2021	Wide World Importers	-1,607.00	-1,607.00		108197	Invoice 107197	3/31/2021	Wide World Importers	Vendor	40000	
Medium	3/12/2021	107198	-1,412.87	-1,412.87		108198	Invoice 107198	3/31/2021	Graphic Design Institute	Vendor	30000	
None	1/30/2021	S-REV102109	808.76		808.76					Customer		
None	2/1/2021	School of Fine Art	11,439.04		11,439.04					Customer		
None	1/31/2021	S-NV102171	2,877.48		2,877.48					Customer		
Medium	7/3/2021	Exp Reimburs. BH 49012	-746.32	-746.32		49012	Office Supplies Expense		Liter Henderson	Employee	EM	

Number of Lines: 7 | Lines to Review: 4 | Lines with Difference: 3 | Balance on Bank Account: 91,462.24 | Total Transaction Amount: 8,145.96 | Balance on Bank Account After...: 85,481.52 | Statement Ending Balance

Bank Reconciliation improvements

Dynamic 365 Business Central

Bank Acc. Reconciliation | Work Date: 7/1/2021

CHECKING - 24

Process: Bank Matching Posting

Match Details

Bank Account No: CHECKING Balance Last Statement: 0.00

Statement No: 24 Statement Ending Balance: 0.00

Statement Date: 7/1/2021

Bank Statement Lines					Bank Account Ledger Entries						
Transaction Date	Type	Description	Statement Amount	Applied Amount	Difference	Posting Date	Document Type	Document No.	Description	Amount	Remaining Amount
7/1/2021	Bank Acct.	S-INV102189	809.76	809.76		7/1/2021	1901		Office Supplies Expense	-3,400.00	-3,400.00
7/1/2021	Bank Acct.	School of Fine Art	11,439.05	11,439.05		7/1/2021	1902		Office Supplies Expense	-4,500.00	-4,500.00
7/1/2021	Bank Acct.	S-INV102171	2,877.48	2,877.48		7/1/2021	Payment	G04001	Tray Research	809.76	809.76
7/1/2021	Bank Acct.	INV102172	1,233.33	1,233.33		7/1/2021	Payment	G04002	School of Fine Art	11,439.05	11,439.05
4/30/2021	Bank Acct.	S-INV102180	4,316.92	4,316.92		7/1/2021	Payment	G04003	Reflected	2,877.48	2,877.48
7/1/2021	Bank Acct.	Invoice S-INV102181	1,214.64	1,214.64		7/1/2021	Payment	G04004	School of Fine Art	1,233.33	1,233.33
6/23/2021	Bank Acct.	School of Fine Art	16,333.12	16,333.12		6/23/2021	Payment	G04005	Alpha Ski House	4,316.92	4,316.92
6/24/2021	Bank Acct.	S-INV102183	2,833.48	2,833.48		7/1/2021	Payment	G04006	Tray Research	1,214.64	1,214.64
1/7/2021	Bank Acct.	S-INV102184	2,877.48	-	2,877.48	6/23/2021	Payment	G04007	School of Fine Art	16,333.12	16,333.12
2/7/2021	Bank Acct.	102195	1,012.20	-	1,012.20	6/24/2021	Payment	G04008	School of Fine Art	2,833.48	2,833.48
6/25/2021	Bank Acct.	Invoice S-INV102196	19,944.69	19,944.69		7/1/2021	Payment	G04009	Reflected	2,877.48	2,877.48
6/30/2021	Bank Acct.	102197	3,081.84	3,081.84		7/1/2021	Payment	G04010	Tray Research	1,012.20	1,012.20
7/1/2021	Bank Acct.	INV102198	2,639.85	2,639.85		6/25/2021	Payment	G04011	School of Fine Art	19,944.69	19,944.69
						6/30/2021	Payment	G04012	Reflected	3,081.84	3,081.84
						7/1/2021	Payment	G04013	School of Fine Art	2,639.85	2,639.85
Total Balance			70,023.94			Total on Outstanding				0.00	
Balance			20,665.54	Total Difference	1,899.18	Balance			91,462.24	Balance To Reconcile	91,462.24

Bank Reconciliation improvements

Dynamic 365 Business Central

Bank Acc. Reconciliation | Work Date: 7/1/2021

CHECKING - 24

Match Details

This statement line matched the corresponding bank account ledger entry on the following fields: Remaining Amount, Posting Date.

Posting Date	Document Type	Document No.	External Document No.	Description	Amount	Remaining Amount
4/30/2021	Payment	G04005		Alpha Ski House	4,316.92	4,316.92

Bank reconciliation improvements

Bank Account Card | Work Date: 7/1/2021

CHECKING - World Wide Bank

Process Report Bank Statement Service Bank Account Navigate More options

General

No. CHECKING Bank Name World Wide Bank
 Name World Wide Bank Bank Clearing Standard
 Bank Branch No. 609999 Bank Clearing Code
 Bank Account No. 99 99 888 Check Date Format
 Balance 91,482.24 Check Date Separator
 Balance (S) 91,482.24 Bank Account Linking Status Not Linked
 Our Contact Code CF Last Date Modified 3/19/2021
 Blocked **Payment Matching**
 Enable Automatic Payment Matching
 SEPA Direct Debit Exp. Format Match Tolerance Type Percentage
 Credit Transfer Mfg. Nos. Match Tolerance Value
 Direct Debit Mfg. Nos. Match Tolerance Value
 Creditor No.

Communication

Address 1 High Hubham Phone No.
 Address 2 Mobile Phone No.
 City London Contact Great Colburnton
 State Bank Code
 ZIP Code GB-WC1 8DG Email
 Country/Region Code GB Home Page

Posting >

Bank reconciliation improvements

Bank Account Statement | Work Date: 7/3/2021

CHECKING - 24

Print Undo Open in Excel More options

Bank Account No. CHECKING Balance Last Statement 0.00
 Statement No. 24 Statement Ending Balance 70,023.84
 Statement Date 7/3/2021

Transaction Date	Type	Description	Statement Amount	Applied Amount	Difference
7/1/2021	Bank Account Ledger Entry	S-INV102169	809.76	809.76	0.00
7/1/2021	Bank Account Ledger Entry	School of Fine Art	11,439.05	11,439.05	0.00
7/3/2021	Bank Account Ledger Entry	S-INV102171	2,877.48	2,877.48	0.00
7/1/2021	Bank Account Ledger Entry	INV102172	1,223.33	1,223.33	0.00
6/30/2021	Bank Account Ledger Entry	S-INV102180	4,316.92	4,316.92	0.00
7/1/2021	Bank Account Ledger Entry	Invoice S-INV102181	1,214.64	1,214.64	0.00
6/23/2021	Bank Account Ledger Entry	School of Fine Art	16,333.12	16,333.12	0.00
6/24/2021	Bank Account Ledger Entry	S-INV102183	2,853.48	2,853.48	0.00
1/7/2021	Bank Account Ledger Entry	S-INV102184	2,877.48	2,877.48	0.00
2/7/2021	Bank Account Ledger Entry	102195	1,052.20	1,052.20	0.00
6/25/2021	Bank Account Ledger Entry	Invoice S-INV102196	19,944.69	19,944.69	0.00
6/30/2021	Bank Account Ledger Entry	102197	3,081.84	3,081.84	0.00
7/1/2021	Bank Account Ledger Entry	INV102198	2,039.85	2,039.85	0.00
Balance			809.76		
Total balance			70,023.84		
				Total Difference	0.00

Bank reconciliation improvements

Dynamic 365 Business Central

Bank Account Statement
CRONUS USA, Inc.

Friday, March 19, 2021
Page 1
BNIELSE

Bank Account Statement: Bank Account No.: CHECKING, Statement No.: 24

Transaction Date	Type	Document No.	Description	Value Date	Applied Entries	Applied Amount	Statement Amount
Statement No. 24							
07/01/21	Bank Account Ledger Entry		S-INV102169		1	809.76	809.76
07/01/21	Bank Account Ledger Entry		School of Fine Art		1	11,439.05	11,439.05
07/03/21	Bank Account Ledger Entry		S-INV102171		1	2,877.48	2,877.48
07/01/21	Bank Account Ledger Entry		INV102172		1	1,223.33	1,223.33
06/30/21	Bank Account Ledger Entry		S-INV102180		1	4,316.92	4,316.92
07/01/21	Bank Account Ledger Entry		Invoice S-INV102181		1	1,214.64	1,214.64
06/23/21	Bank Account Ledger Entry		School of Fine Art		1	16,333.12	16,333.12
06/24/21	Bank Account Ledger Entry		S-INV102183		1	2,853.48	2,853.48
01/07/21	Bank Account Ledger Entry		S-INV102184		1	2,877.48	2,877.48
02/07/21	Bank Account Ledger Entry		102195		1	1,012.20	1,012.20

Simplified bank statement file import

Dynamic 365 Business Central

Bank Account Card - CHECKING - World Wide Bank

General

No. CHECKING Bank Name

Name World Wide Bank Bank Clearing Standard

Bank Branch No. B099999

Bank Account No. 99 99 9988

Balance

Balance (\$) Our Contact Code

Blocked

SEPA Direct Debit Exp. Format

Credit Transfer Mgt. No.

Direct Debit Mgt. No.

Creditor No.

Communication

Address 1 High Hobson

Address 2

City London

State

ZIP Code GB WC1 3DG

Country/Region Code GB

Bank Statement File Setup

Review and define the column definitions of your bank statement file. When you enter or change a value, the File Preview section will update accordingly.

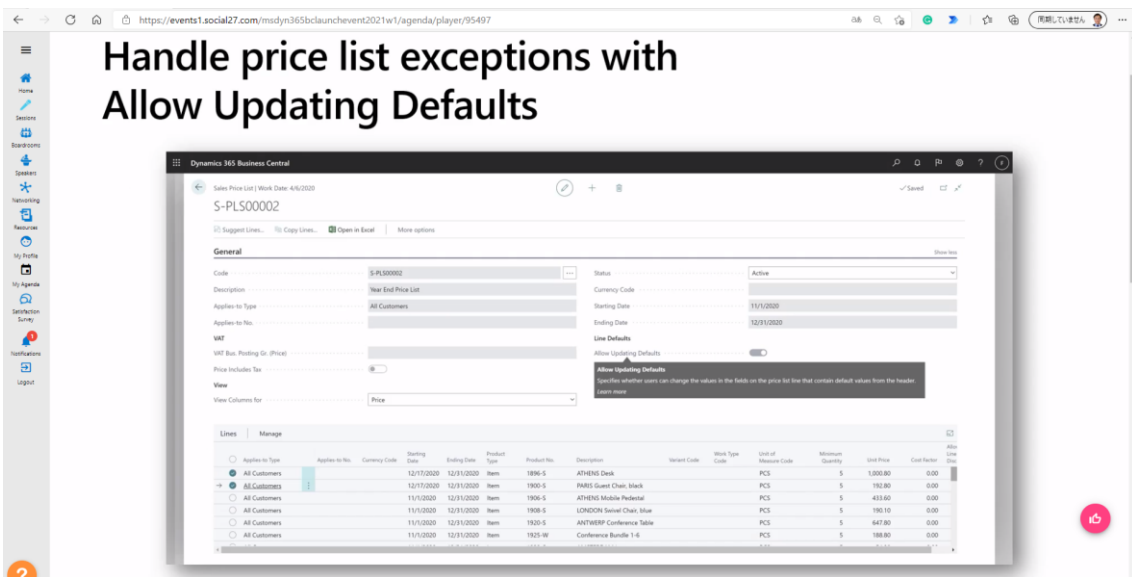
Date Column No. 1

Amount Column No. 5

Description Column No. 7

File Preview

Date	Amount	Description
01/07/2021	809.76	S-INV102169
01/07/2021	11439.05	School of Fine Art
01/07/2021	2877.48	S-INV102171
01/07/2021	1223.33	INV102172
30/06/2021	4316.92	S-INV102180



Handle price list exceptions with Allow Updating Defaults

General

Code: S-PLS00002 | Status: Active

Description: New End Price List | Currency Code: | Starting Date: 11/1/2020 | Ending Date: 12/31/2020

Applies to Type: All Customers | Applies to No.: | VAT: | Price Includes Tax: | View Columns for: Price

Line Defaults

Allow Updating Defaults: (Callout: Specify whether users can change the values in the fields on the price list line that contain default values from the header. Learn more.)

Apply to Type	Apply to No.	Starting Date	Ending Date	Product Type	Product No.	Description	Variant Code	Work Type	Unit of Measure Code	Minimum Quantity	Unit Price	Cost Factor
All Customers		12/17/2020	12/31/2020	Item	1896-S	ATHENS Desk		PCS		5	1,000.00	0.00
All Customers		12/17/2020	12/31/2020	Item	1900-S	PARIS Guest Chair, Black		PCS		5	182.80	0.00
All Customers		11/1/2020	12/31/2020	Item	1906-S	ATHENS Mobile Pedestal		PCS		5	433.60	0.00
All Customers		11/1/2020	12/31/2020	Item	1908-S	LONDON Seated Chair, Black		PCS		5	188.10	0.00
All Customers		11/1/2020	12/31/2020	Item	1920-S	ANTWERP Conference Table		PCS		5	547.80	0.00
All Customers		11/1/2020	12/31/2020	Item	1925-W	Conference Bundle 1-6		PCS		5	188.80	0.00

Easy contact insights and access to history of interactions with contacts

General

No.: CT000001 | Company No.: CT000001 | Company Name: Adatum Corporation | Business Relation: Customer | Salesperson Code: JO

History

Interaction	Salesperson Code	Description	Attachments	Comment	Opportunity No.	Campaign No.	Date
Sales Statement - by Jim Olive	JO	Statement	No	No			1/1/2020
Coverheet - by Jim Olive	JO	Coverheet	No	No			1/1/2020
Coverheet - by Jim Olive	JO	Coverheet	No	No			1/1/2020
Sales Order Confirmation - by Jim Olive	JO	Order S-ORD101002	No	No			5/1/2021
Sales Order Confirmation - by Jim Olive	JO	Order S-ORD101001	No	No			4/2/2021

Easy contact insights and access to history of interactions with contacts

Profiles

Profile	Company	Salesperson Code
First Up C	Adatum Corporation	JO

History

Interaction	Salesperson Code	Description	Attachments	Comment	Opportunity No.	Campaign No.	Date
Sales Statement - by Jim Olive	JO	Statement	No	No			1/1/2020
Coverheet - by Jim Olive	JO	Coverheet	No	No			1/1/2020
Coverheet - by Jim Olive	JO	Coverheet	No	No			1/1/2020
Sales Order Confirmation - by Jim Olive	JO	Order S-ORD101002	No	No			5/1/2021
Sales Order Confirmation - by Jim Olive	JO	Order S-ORD101001	No	No			4/2/2021

Changes in synchronization between contact and customer or vendor

Customer Card | Work Date: 4/12/2021
10000 · Adatum Corporation

General

No.	10000	Credit Limit (\$)	0.00
Name	Adatum Corporation	Blocked	
Balance (\$)	0.00	Total Sales	78,771.10
Balance Due (\$)	0.00	Costs (\$)	40,255.70

Address & Contact

Address: 192 Market Square
 City: Atlanta, GA
 ZIP Code: 31772

Phone No.: 00000000
 Email: AdatumCorporation@contoso.com
 Contact Name:

Customer Picture

Sell-to Customer Sales History

0	0	2
2	0	0

Changes in synchronization between contact and customer or vendor

Contact Card | Work Date: 4/12/2021
CT000001 · Adatum Corporation

General

No.	CT000001	Company Name	Adatum Corporation
Name	Adatum Corporation	Business Relation	Customer
Type	Company	Salesperson Code	JO
Company No.	CT000001		

Address & Contact

Address: 192 Market Square
 City: Atlanta, GA
 ZIP Code: 31772

Phone No.: 00000000
 Email: AdatumCorporation@contoso.com
 Contact Name:

Communication

Address: 192 Market Square
 City: Atlanta, GA
 ZIP Code: 31772

Phone No.: 00000000
 Mobile Phone No.:
 Email: AdatumCorporation@contoso.com
 Home Page:
 Language Code: ENU

Changes in synchronization between contact and customer or vendor

Customer Card | Work Date: 4/12/2021

10000 · Adatum Corporation

New Document Approve Request Approval Prices & Discounts Navigate Customer More options

General Show more

No. 10000	Credit Limit (\$) 0.00
Name Adatum Corporation	Blocked
Balance (\$) 0.00	Total Sales 78,771.10
Balance Due (\$) 0.00	Costs (\$) 40,255.70


Address & Contact Show more

Address 192 Market Square	Phone No. 00000000
Address 2	Mobile Phone No.
Country/Region C. US	Email AdatumCorporation@contoso
City Atlanta	Home Page
State GA	Contact
ZIP Code 31772	Contact Code
	Contact Name

[Show on Map](#)

Details | Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No. 10000

0	0	2
<small>Ongoing Sales Quotes</small>	<small>Ongoing Sales Request Orders</small>	<small>Ongoing Sales Orders</small>
2	0	0
<small>Ongoing Sales Requests</small>	<small>Ongoing Sales Return Orders</small>	<small>Ongoing Sales Credit Memos</small>

Changes in synchronization between contact and customer or vendor

Customer Card | Work Date: 4/12/2021

10000 · Adatum Corporation

New Document Approve Request Approval Prices & Discounts Navigate Customer More options

General Show more

No. 10000	Credit Limit (\$) 0.00
Name Adatum Corporation	Blocked
Balance (\$) 0.00	Total Sales 78,771.10
Balance Due (\$) 0.00	Costs (\$) 40,255.70


Address & Contact Show more

Address 192 Market Square	Phone No. 00000000
Address 2	Mobile Phone No.
Country/Region C. US	Email AdatumCorporation@contoso
City Atlanta	Home Page
State GA	Contact
ZIP Code 31772	Contact Code CT000002
	Contact Name Robert Townes

[Show on Map](#)

Details | Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No. 10000

0	0	2
<small>Ongoing Sales Quotes</small>	<small>Ongoing Sales Request Orders</small>	<small>Ongoing Sales Orders</small>
2	0	0
<small>Ongoing Sales Requests</small>	<small>Ongoing Sales Return Orders</small>	<small>Ongoing Sales Credit Memos</small>

Changes in synchronization between contact and customer or vendor

The screenshot displays two side-by-side forms in Dynamics 365. The left form is a 'Customer Card' for 'Adatum Corporation' (No. 10000). The right form is a 'Contact Card' for 'Robert Townes' (No. CT000002). Both forms have a 'General' section with fields for Name, Type, and Company. The 'Address & Contact' section in the Customer Card includes fields for Address, City, State, ZIP Code, and Contact Name. The 'Address & Contact' section in the Contact Card includes fields for Address, City, State, ZIP Code, and Language Code. A purple box highlights the 'Email' field in the Customer Card, and another purple box highlights the 'Mobile Phone No.' field in the Contact Card. A purple arrow points from the Customer Card to the Contact Card.

Synchronize item availability from Business Central to Dynamics 365 Sales

The screenshot shows the 'Dynamics 365 Connection Setup' page in Dynamics 365 Business Central. The page title is 'Dynamics 365 Connection Setup' and it includes a checkmark icon. Under the 'Advanced Connection Settings' section, there are three toggle switches: 'Import Dynamics 365 Sales Solution' (off), 'Automatically Synchronize Item Availability' (on), and 'Automatically Synchronize Item Availability' (on). A purple arrow points to the 'Automatically Synchronize Item Availability' toggle switch. Below the toggle switches, there is a 'Dynamics 365 SDK Version' section and a note: 'To enable the connection, choose Finish. You will be asked to specify an administrative user account in Dynamics 365 Sales.'

Synchronize item availability from Business Central to Dynamics 365 Sales

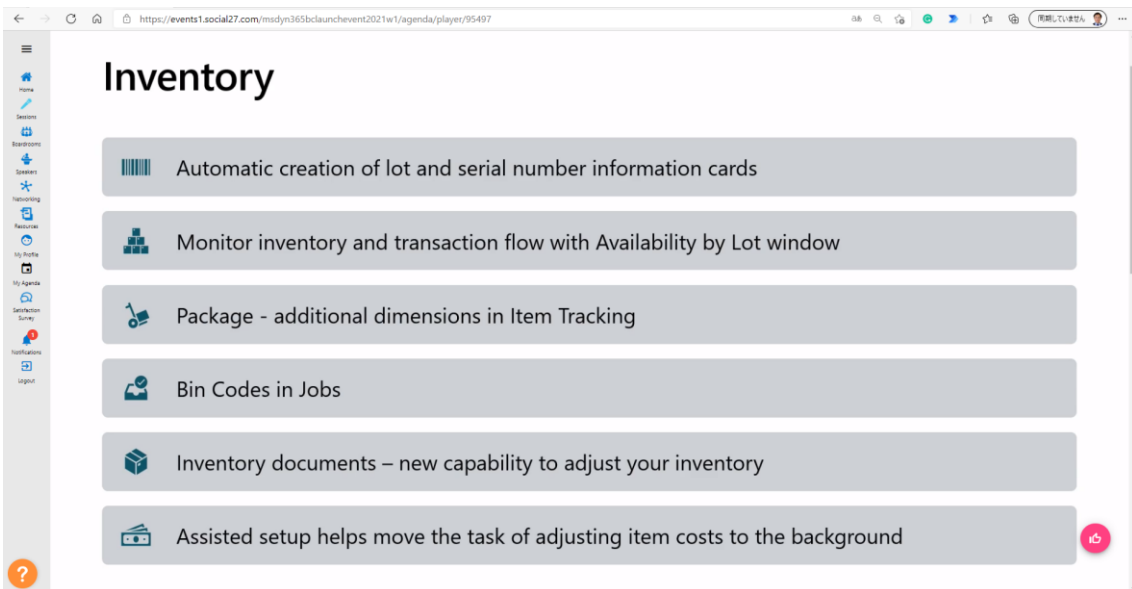
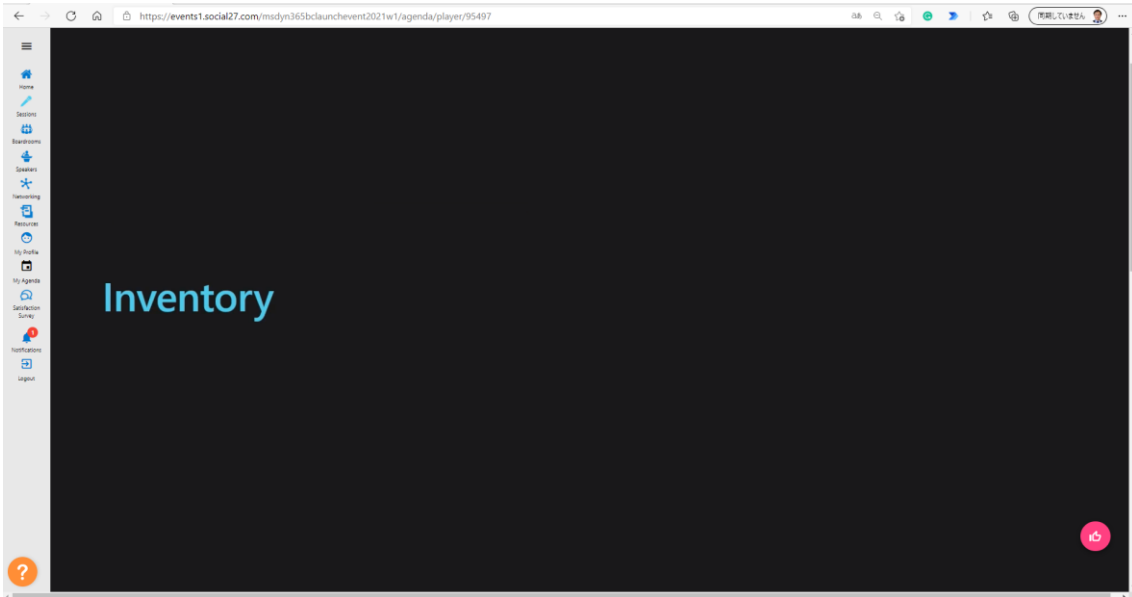
The screenshot shows the 'Microsoft Dynamics 365 Connection Setup' interface. On the left, the 'Dynamics 365 Business Central' pane is open to 'Advanced Connection Settings', where the 'Automatically Synchronize Item Availability' checkbox is checked. A purple arrow points from this checkbox to the 'Advanced Settings' section on the right. In the 'Advanced Settings' section, the 'Automatically Synchronize Item Availability' checkbox is also checked, with a tooltip explaining that it specifies that item availability job queue entries will be scheduled. Another purple arrow points from the 'Business Central User' toggle to this checkbox.

Synchronize item availability from Business Central to Dynamics 365 Sales

The screenshot shows the 'Dynamics 365 Sales Hub' interface for a sales order titled 'Synch to BC PO#123'. The 'PRODUCTS' table is visible, with a purple box highlighting the 'Quantity On Hand (Existing P...' column. The table contains the following data:

Price Per Unit	Quantity	Quantity On Hand (Existing P...	Amount	Extended Amount
\$1,000.80	1.000000	3.00	---	\$1,000.80
\$647.80	1.000000	10.00	---	\$647.80
\$54.90	1.000000	7.00	---	\$54.90

The 'Detail Amount' is \$1,703.50. The 'SALES INFORMATION' section shows the 'Potential Customer' as 'Adatum Corporation'.



Automatic creation of lot and serial number information cards

Item Tracking Code Card

SNALL · SN specific tracking

General

Code: SNALL Description: SN specific tracking

Serial No.

General

SN Specific Tracking SN Warehouse Tracking

Create SN Info. on po... SN Transfer Tracking

Create SN Info. on posting
Specifies that if the Serial No. information card is missing for the document line, the card will be created during posting.
[Learn more](#)

Outbound

SN No. Info. Must Exist SN Purchase Tracking

SN Sales Tracking SN Sales Tracking

SN Positive Adjmt. Tra... SN Positive Adjmt. Tra...

SN Negative Adjmt. Tr... SN Negative Adjmt. Tr...

SN Assembly Tracking SN Assembly Tracking

Automatic creation of lot and serial number information cards

Item Tracking Code Card

SNALL · SN specific tracking

General

Code: SNALL Description: SN specific tracking

Serial No.

General

SN Specific Tracking SN Warehouse Tracking

Create SN Info. on po... SN Transfer Tracking

Create SN Info. on posting
Specifies that if the Serial No. information card is missing for the document line, the card will be created during posting.
[Learn more](#)

Outbound

SN No. Info. Must Exist SN Purchase Tracking

SN Sales Tracking SN Sales Tracking

SN Positive Adjmt. Tra... SN Positive Adjmt. Tra...

SN Negative Adjmt. Tr... SN Negative Adjmt. Tr...

SN Assembly Tracking SN Assembly Tracking

Edit - Item Tracking Lines - 1966-W - Conference Bundle 2-8

Source	Item Tracking	Undefined
Quantity	15	0 15.00
Qty. to Handle	15	0 15.00
Item Tracking Code	SNALL	Description SN specific tracking

Item No.: 1966-W

Variant Code: []

Quantity to Create: 15

Create New Lot No.:

Create SN Information

Create SN Information
Create Serial Number information card for each serial number.
[Learn more](#)

OK Cancel

Monitor inventory and transaction flow with Availability by Lot window

The screenshot shows the Dynamics 365 Business Central interface for item '1909-S · LONDON Swivel Chair, blue'. The 'Item Availability by' dropdown menu is open, and a purple arrow points to the 'Lot' option. The main window displays various tabs like 'Inventory', 'Costs & Posting', 'Prices & Sales', and 'Replenishment'. A picture of a blue swivel chair is visible on the right side of the window.

Monitor inventory and transaction flow with Availability by Lot window

The screenshot shows the Dynamics 365 Business Central interface for item '1909-S · LONDON Swivel Chair, blue'. The 'Availability by Lot' window is open, displaying a table with the following data:

Code T	Expiration Date	Inventory	Gross Requirement	Scheduled Receipt	Planned Order Receipt	Available Inventory
LOT-1		2	2	0	0	0
LOT-2		4	2	0	0	2
LOT-3		2	2	4	0	4
LOT-4		2	0	0	0	0
LOT-5		0	0	0	0	0

The window also includes options for 'Item No.', 'Location Filter', 'Variant Filter', 'Period', 'View by', 'View as', and 'Date Filter'.

Monitor inventory and transaction flow with Availability by Lot window

Item No. 1909-S · LONDON Swivel Chair, blue

Options

Item No. 1909-S Period Day
 Location Filter View as Net Change
 Variant Filter Date Filter 04/12/21

Code T	Expiration Date	Inventory	Gross Requirement	Scheduled Receipt	Planned Order Receipt	Available Inventory
LOT-1		0	0	0	0	0
→ LOT-2		2	0	0	0	2

Edit - Reservation Entries - Sales Line

Reservation Status	Item No.	Location Code	Quantity (Best)	Reserved For	Reserved From
→ Surplus	1909-S		-1	Sales Order S-ORD101005	
Surplus	1909-S		-1	Sales Order S-ORD101006	

Package No. - additional dimension in Item Tracking

Item Tracking Code Card

PACKAGE · Package specific tracking

General

Code PACKAGE Description Package specific tracking

Serial No. >

Lot No. >

Package Tracking

General

Package Specific Track...

Package Warehouse T...

Package Transfer Trac...

Inbound

Package Info. Inbound...

Outbound

Package Info. Outbound...

Package Purchase Inb...

Package Purchase Out...

Package Sales Inbound...

Package Sales Outbound...

Package Pos. Adj. Inb...

Package Pos. Adj. Out...

Package Neg. Adj. Inb...

Package Neg. Adj. Du...

Package Assembly Inb...

Package Assembly Du...

Misc. >

Package No. - additional dimension in Item Tracking

Item Tracking Code Card

PACKAGE · Package specific tracking

General

Code: PACKAGE Description: Package specific tracking

Serial No. >

Lot No. >

Package Tracking

General

Package Specific Track... Package Warehouse T...

Package Transfer Trac...

Inbound

Package Info. Inbound...

Package Purchase Inb...

Package Sales Inbound...

Package Pos. Adj. Inb...

Package Neg. Adj. Inb...

Package Assembly Inb...

Outbound

Package Info. Outbound...

Package Purchase Out...

Package Sales Outbound...

Package Pos. Adj. Out...

Package Neg. Adj. Out...

Package Assembly Out...

Misc. >

Edit - Item Tracking Lines - 1973-S · MUNICH Swivel Chair, yellow

Source: Purchase Line Item Tracking Undefined

Quantity: 20 20 20

Qty. to Handle: 20 20 20

Qty. to Invoice: 20 20 20

Item Tracking Code: PACKAGE Description: Package specific tracking

Avail. Serial No.	Serial No.	Avail. Lot No.	Lot No.	Avail. Package No.	Package No.	Quantity (Base)	Qty. to Handle (Base)	Qty. to Invoice (Base)	App. from Item Entry
Yes	:	Yes		Yes	PACK_1	4	4	4	0
Yes	:	Yes		Yes	PACK_2	16	16	16	0

Inventory documents – new capability to adjust your inventory

Dynamics 365 Business Central

Receipt - IR000001

General

No.: IR000001 Document Date: 4/12/2021

Posting Description: Receipt IR000001 External Document No.:

Location Code: WEST Salesperson/Purchaser Code:

Gen. Bus. Posting Group: Connection:

Posting Date: 4/12/2021 Status: Open

Item No.	Description	Quantity	Unit Amount	Indirect Cost %	Unit Cost	Amount	Unit of Measure Code
1994-S	ATHENS Desk	1	780.70	10	856.77	780.70	PCS
1900-S	PARIS Guest Chair, black	2	150.30	0	150.30	300.60	PCS
1904-S	ATHENS Mobile Pedestal	3	338.20	0	338.20	1,014.60	PCS
1908-S	LONDON Swivel Chair, blue	4	148.10	0	148.10	592.40	PCS

Dimensions >

Dynamics 365 Business Central

Inventory Shipment | Work Date: 4/12/2021

Shipment - IS000001

General

No.: IS000001 Document Date: 4/12/2021

Posting Description: Shipment IS000001 External Document No.:

Location Code: WEST Salesperson/Purchaser Code:

Gen. Bus. Posting Group: Connection:

Posting Date: 4/12/2021 Status: Open

Item No.	Description	Quantity	Reason Code	Unit Cost	Unit Amount	Amount	Unit of Measure Code	Department Code	Collateral Code
1994-S	ATHENS Desk	1	DAMAGED	780.70	780.70	780.70	PCS		
1900-S	PARIS Guest Chair, black	1	DAMAGED	150.30	150.30	150.30	PCS		

Dimensions >

Bin in Jobs

Dynamics 365 Business Central

JOB00010 Reception area remodel 1240 Decorations and Furnishings | Work Date: 4/12/2021

Job Planning Lines

Job Task No. T	Line Type	Planning Date	Planned Delivery Date	Document No.	Type	No.	Description	Location Code	Bin Code	Quantity	Unit Cost	Total Cost
1240	Both Budge...	1/27/2021	1/27/2021		Item	1936-S	BERLIN Guest Chair, yellow	NORTH	N-Q2-0001	8	150.30	1,202.40
1240	Both Budge...	1/27/2021	1/27/2021		Item	1920-S	ANTWERP Conference Table	NORTH	N-Q2-0002	1	505.40	505.40

Bin in Jobs

Dynamics 365 Business Central

JOB00010 Reception area remodel 1240 Decorations and Furnishings | Work Date: 4/12/2021

Job Planning Lines

Job Task No. ↑	Line Type	Planning Date	Planned Delivery Date	Document No.	Type	No.	Description	Location Code	Bin Code	Quantity	Unit Cost	Total Cost
1240	Both Budget...	1/27/2021	1/27/2021		Item	1936-S	BERLIN Guest Chair, yellow	NORTH	N-02-0001	8	150.30	1,202.40
→ 1240	Both Budget...	1/27/2021	1/27/2021									

Bin Contents List - Location NORTH Item Variant

Location Code ↑	Bin Code	Item No. ↑	Defa...	Fixed	Dedi...	Quantity	Quantity (Base)
→ NORTH	N-02-0001	1936-S	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	3	3
NORTH	N-04-0001	1936-S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	10	10
NORTH	N-04-0002	1936-S	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5	5

OK Cancel

Bin in Jobs

Dynamics 365 Business Central

JOB00010 Reception area remodel 1240 Decorations and Furnishings | Work Date: 4/12/2021

Job Journals | Work Date: 4/12/2021

Batch Name: DEFAULT

Manage Process Page Prepare Post/Print Job Line Open in Excel More options

Post Post and Print

Line Type	Posting Date	Document No.	Job No. ↓	Job Task No. ↓	Type	No.	Description	Location Code	Bin Code	Work Type Code	Unit of Measure
→	4/12/2021	JOB00010	JOB00010	1240	Item	1936-S	BERLIN Guest Chair, yellow	NORTH	N-04-0001		PCS
	4/12/2021	JOB00010	JOB00010	1240	Item	1920-S	ANTWERP Conference Table	NORTH	N-02-0002		PCS

Number of Lines Job Description Account Name

Assisted setup helps move the task of adjusting item costs to the background

Inventory Setup

⌘ If you turn off automatic cost adjustments or posting, you must do those tasks manually or schedule a job queue entry to run in the background. [Schedule a job queue entry](#) | [Learn more](#)

General Show more

Automatic Cost Posting

Automatic Cost Adjus... **Never**

Default Costing Meth... **Never**

Location

Location Mandatory **Quarter**

Prevent Negative Inve...

Skip Prompt to Create...

Copy Item Descr. to E...

Day

Week

Month

Quarter

Year

Always

Assisted setup helps move the task of adjusting item costs to the background

Inventory Setup

⌘ If you turn off automatic cost adjustments or posting, you must do those tasks manually or schedule a job queue entry to run in the background. [Schedule a job queue entry](#) | [Learn more](#)

General Show more

Automatic Cost Posting

Automatic Cost Adjus... **Never**

Default Costing Meth... **Never**

Location

Location Mandatory **Quarter**

Dimensions

Numbering

Schedule Cost Adjustment and Posting

Choose the job queue entry to create.

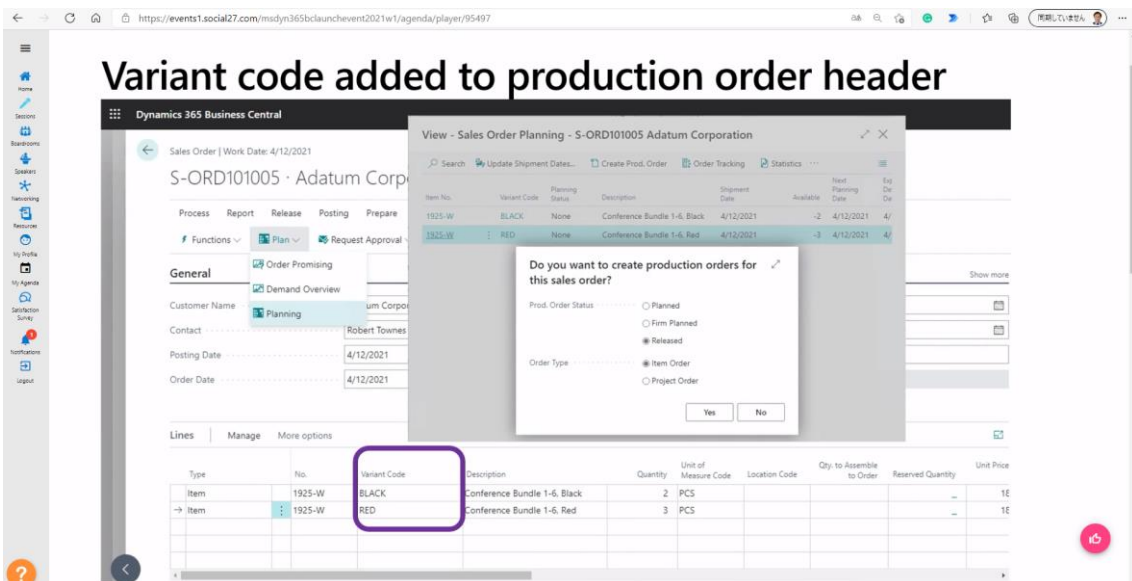
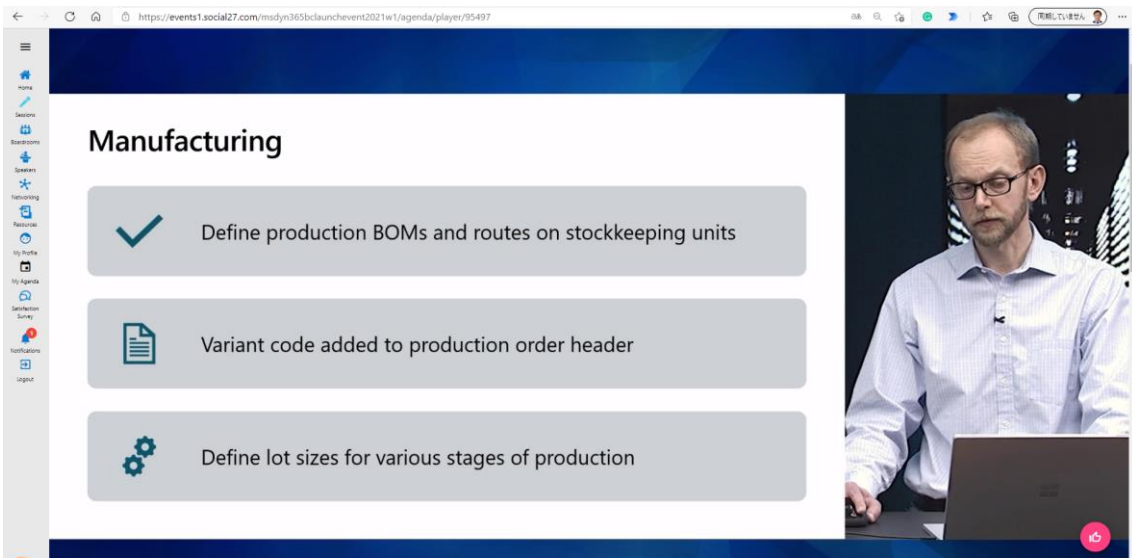
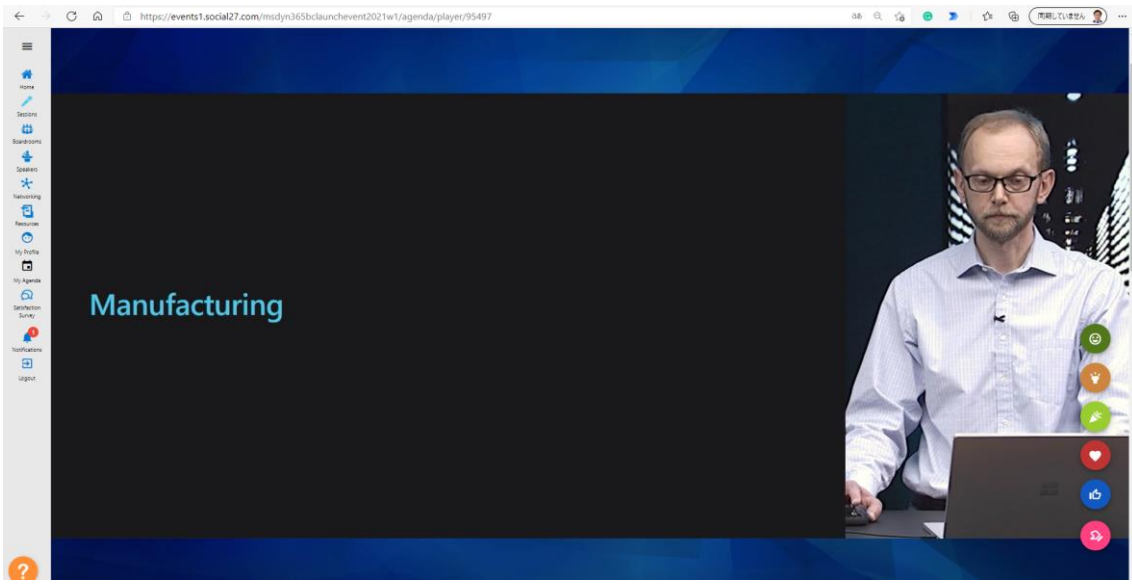
Post Inventory Cost to G/L

Adjust Cost - Item Entries

Adjust Cost - Item Entries

Create a job queue entry that will adjust costs for all items at a specified time. For example, outside working hours. The default will be 1 AM, but you can change that. [Learn more](#)

Back Next Finish



Variant code added to production order header

Released Production Order | Work Date: 4/12/2021
RPO-0001 · Conference Bundle 1-6, Black

Process Order More options

General

No. RPO-0001 Quantity 2

Description Conference Bundle 1-6, Black Due Date 4/12/2021

Source Type Item Blocked

Source No. 1925-W Last Date Modified

Variant Code BLACK

Lines Manage More options

Item No.	Variant Code	Description	Quantity	Unit of Measure Code	Due Date
→ 1925-W	BLACK	Conference Bundle 1-6, Black	2	PCS	4/12/2021

Schedule > 4/12/2021 11:48 AM 4/12/2021 4:00 PM

Released Production Order | Work Date: 4/12/2021
RPO-0002 · Conference Bundle 1-6, Red

Process Order More options

General

No. RPO-0002 Quantity 3

Description Conference Bundle 1-6, Red Due Date 4/12/2021

Source Type Item Blocked

Source No. 1925-W Last Date Modified

Variant Code RED

Lines Manage More options

Item No.	Variant Code	Description	Quantity	Unit of Measure Code	Due Date
→ 1925-W	RED	Conference Bundle 1-6, Red	3	PCS	4/12/2021

Schedule > 4/12/2021 9:42 AM 4/12/2021 4:00 PM

Define production BOMs and routes on stockkeeping units (limited support)

Stockkeeping Unit Card | Work Date: 4/12/2021
1925-W · BLACK

New Item Navigate More options

General 1925-W BLACK 0

Invoicing 0.00

Replenishment

Replenishment Syst. Prod. Order

Lead Time Calculat. ...

Purchase

Vendor No. ...

Vendor Item No. ...

Transfer

Transfer-from Code ...

Production

Routing No. 1925-W

Production BOM No. 1925-BLACK

Planning Instance ...

Components at Loc. ...

Lot Size ...

Assembly

Assembly Policy Assemble-to-Stock

Released Production Order | Work Date: 4/12/2021
RPO-0003 · Adatum Corporation

Process Order More options

General

No. RPO-0003 Quantity 0

Description Adatum Corporation Due Date 4/12/2021

Source Type Sales Header Blocked

Source No. S-ORD101005 Last Date Modified

Variant Code

Lines Manage More options

Item No.	Variant Code	Production BOM No.	Description	Quantity	Unit of Measure Code
1925-W	BLACK	1925-BLACK	Conference Bundle 1-6, Black	2	PCS
→ 1925-W	RED	1925-RED	Conference Bundle 1-6, Red	3	PCS

Define lot sizes for various stages of production

Dynamics 365 Business Central

Released Production Order | Work Date: 4/12/2021

RPO-0003 - Adatum Corporation

Process Order | More options

General

No. RPO-0003 | Description Adatum Corporation | Source Type Sales Header | Source No. S-ORD101005 | Variant Code

Lines | Manage | Functions | Line | Fewer options

Item Availability by Dimensions Components | Reservation Entries Routing Item Tracking Lines

→ 1925-W RED 1925-RED Conference Bundle 1-6, Rad 3 PCS

Edit - Prod. Order Routing - RPO-0003 Adatum Corporation 1925-W

Search + New Edit List Delete Process Line Page More options

Operation No. 1	Type	No.	Description	Starting Date-Time	Ending Date-Time	Setup Time	Run Time	Lot Size
10	Work Center	SHOPFLOOR	Assemble table	4/12/2021 9:42 AM	4/12/2021 12:42 PM	0	1	1
20	Work Center	SHOPFLOOR	Assemble chair	4/12/2021 12:42 PM	4/12/2021 1:00 PM	0	8	100
30	Work Center	QC	Quality assurance	4/12/2021 1:00 PM	4/12/2021 4:00 PM	0	1	1

Close

Define lot sizes for various stages of production

Dynamics 365 Business Central

Released Production Order | Work Date: 4/12/2021

RPO-0003 - Adatum Corporation

Process Order | More options

General

No. RPO-0003 | Description Adatum Corporation | Source Type Sales Header | Source No. S-ORD101005 | Variant Code

Lines | Manage | Functions | Line | Fewer options

Item Availability by Dimensions Components | Reservation Entries Routing Item Tracking Lines

→ 1925-W RED 1925-RED Conference Bundle 1-6, Rad 3 PCS

Edit - Prod. Order Routing - RPO-0003 Adatum Corporation 1925-W

Search + New Edit List Delete Process Line Page More options

Operation No. 1	Type	No.	Description	Starting Date-Time	Ending Date-Time	Setup Time	Run Time	Lot Size
10	Work Center	SHOPFLOOR	Assemble table	4/12/2021 9:42 AM	4/12/2021 12:42 PM	0	1	1
20	Work Center	SHOPFLOOR	Assemble chair	4/12/2021 12:42 PM	4/12/2021 12:56 PM	0	8	100
30	Work Center	QC	Quality assurance	4/12/2021 12:56 PM	4/12/2021 3:56 PM	0	1	1

Close

https://events1.social27.com/msdyn365bclaunchevent2021w1/agenda/player/95497

Client improvements

The video player shows a man with glasses and a white shirt standing behind a laptop, presenting a slide titled 'Client improvements'. The slide has a dark blue background with the text 'Client improvements' in white. The video player interface includes a sidebar on the left with navigation icons and a red heart icon in the bottom right corner.

https://events1.social27.com/msdyn365bclaunchevent2021w1/agenda/player/95497

Teaching tips and tours

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Cash Management | **Sales** | Purchasing | Setup & Extensions | Intelligent Cloud Insights

Sales Invoices: All | Search | + New | Delete | Release | Posting | Invoice | Navigate | Page | More options

No. T	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Sell-to Contact	Posting Date	Location Code	Assigned User ID	Due Date	Am
S-INV102199	10000	Adatum Corporation		Robert Townes	4/4/2021			5/4/2021	10,7
S-INV102200	10000	Adatum Corporation		Robert Townes	5/1/2021			6/1/2021	7,3
S-INV102201	20000	Trey Research		Helen Ray	4/3/2021			4/17/2021	1,9
S-INV102202	30000	School of Fine Art		Meagan Bond	4/5/2021			4/30/2021	2,5
S-INV102203	30000	School of Fine Art		Meagan Bond	5/13/2021			5/31/2021	6,4
S-INV102204	40000	Alpine Ski House		Ian Deberry	5/1/2021			6/1/2021	2,
S-INV102205	50000	Relecloud		Jesse Homer	4/2/2021			4/16/2021	7,0

About sales invoices ✕

Sales invoices appear in this list until they are finalized and posted. After an invoice is posted, find it again in the Posted Sales Invoices list.

[Learn more](#) [Take tour](#)

Teaching tips and tours

Post an invoice

You post an invoice when you've completed all its details. This action posts the selected invoice, and you can later send it to the customer if needed.

2 of 3

Previous Next

No. T	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Code	Assigned User ID	Due Date	Am
S-INV102192	10000	Adatum Corporation				5/4/2021	10,7
S-INV102200	10000	Adatum Corporation				6/1/2021	7,3
S-INV102201	20000	Trey Research				4/17/2021	1,9
S-INV102202	30000	School of Fine Art				4/30/2021	2,5
S-INV102203	30000	School of Fine Art	Meagan Bond	5/13/2021		5/31/2021	6,4
S-INV102204	40000	Alpine Ski House	Ian Deberry	5/1/2021		6/1/2021	2,
S-INV102205	50000	Relecloud	Jesse Homer	4/2/2021		4/16/2021	7,0

Getting started checklist

Get started

Here are a few steps that make you ready for business

Skip checklist

Your checklist:

- 1. Company details
- 2. Update users
- 3. User permissions
- 4. User settings
- 5. Changing email
- 6. Migrate data

Manage user settings

Manage role, language, and regional settings for users.

0 5 minutes

Start Skip for now

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch Invoice Amount	Sales Invoices Predicted Overdue
\$0	\$0	\$0	0
> See more	> See more	> See more	> See more

Role Centers open faster

- Parts load one by one, top-down, and only if shown on screen
- Remaining parts load when scrolled to
- Reduces memory and processing on server
- Greater gains on Role Centers having more parts
- Applies to Desktop and Tablet clients

Loaded when opening the page

Loaded only when scroll

Double-click a list row or tile

- Double-click now enabled on rows and bricks
- Triggers the default action, such as drilling down to details card or choosing the record in a lookup.

No. 1	Description	Type	Quantity on Hand
1896-S	ATHENS Desk	Inventory	4
1900-S	PARIS Guest Chair, black	Inventory	0
1906-S	ATHENS Mobile Pedestal	Inventory	0
1908-S	LONDON Swivel Chair, blue	Inventory	3
1920-S	ANTWERP Conference Table	Inventory	10
1925-W	Conference Bundle 1-6	Inventory	0

Quick lookup of related details

The screenshot displays a Dynamics 365 Business Central interface for a sales invoice (PS-INV103198) for 'School of Fine Art'. A quick lookup window is open over the 'Customer' field, showing a table of related records:

No.	Name	ZIP Code	Phone No.
2000	School of Fine Art	37125	

The 'Lines' section of the invoice is also visible, showing items like 'BOME Guest Chair, green' and 'SYDNEY Savel Chair, green'.

Clicking a field selects entire value

- Single-click to select entire value of a field
- Favors replacing over editing field values
- Consistent experience when using mouse or keyboard for any field or cell
- Second click places cursor at precise location

The screenshot shows an 'Item Card' for '1906-S · ATHENS Mobile Pedestal'. The 'Description' field is highlighted in blue, indicating that a single click has selected the entire value. A mouse cursor is positioned over the description field.

Scrolling "fixed" and "grid" layouts

- Horizontal scrollbar appears when width of window is reduced, instead of shrinking fields
- Applies to Fixed Layout, Grid Layout controls

version 17

version 18

Scrollbar appears,

More space at reduced widths

- Keeps pages usable and functional at reduced width
- Significantly better experience when embedding the Business Central client in other applications

Dialogs and Report actions always reachable and functional

Report preview toolbar buttons remain reachable

Margins automatically shrink to fit more content in narrow windows

End of support for legacy browsers

- Applies to Internet Explorer and Edge Legacy
- Version 18 displays a blocking screen

Browser not supported

We recommend using a newer browser.

You can continue using your current browser, but this will not provide a reliable online experience.

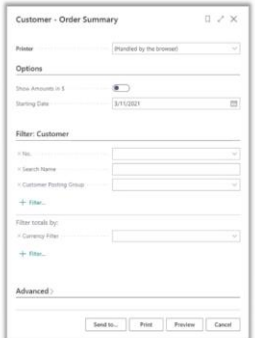

Important! After June 2021, Business Central will no longer allow access using this browser.

[View browser requirements](#) [Continue](#)

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Changing printers in report request page

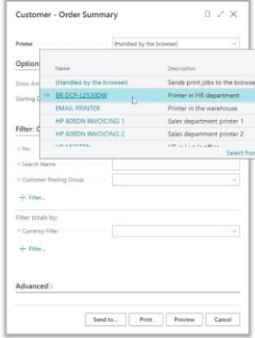
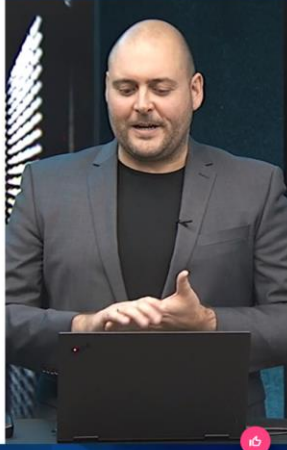
- Cloud printer can be changed before each print job
- Printer selections defaults are applied
- **Default** can be now overridden

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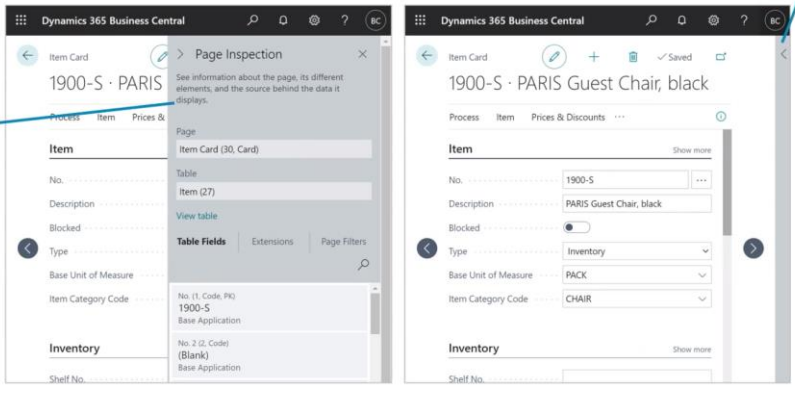



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Collapsible page inspection pane

Better at accommodating page content at reduced screen widths, by automatically switching to an overlaid pane

Pane collapses neatly to the side



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