

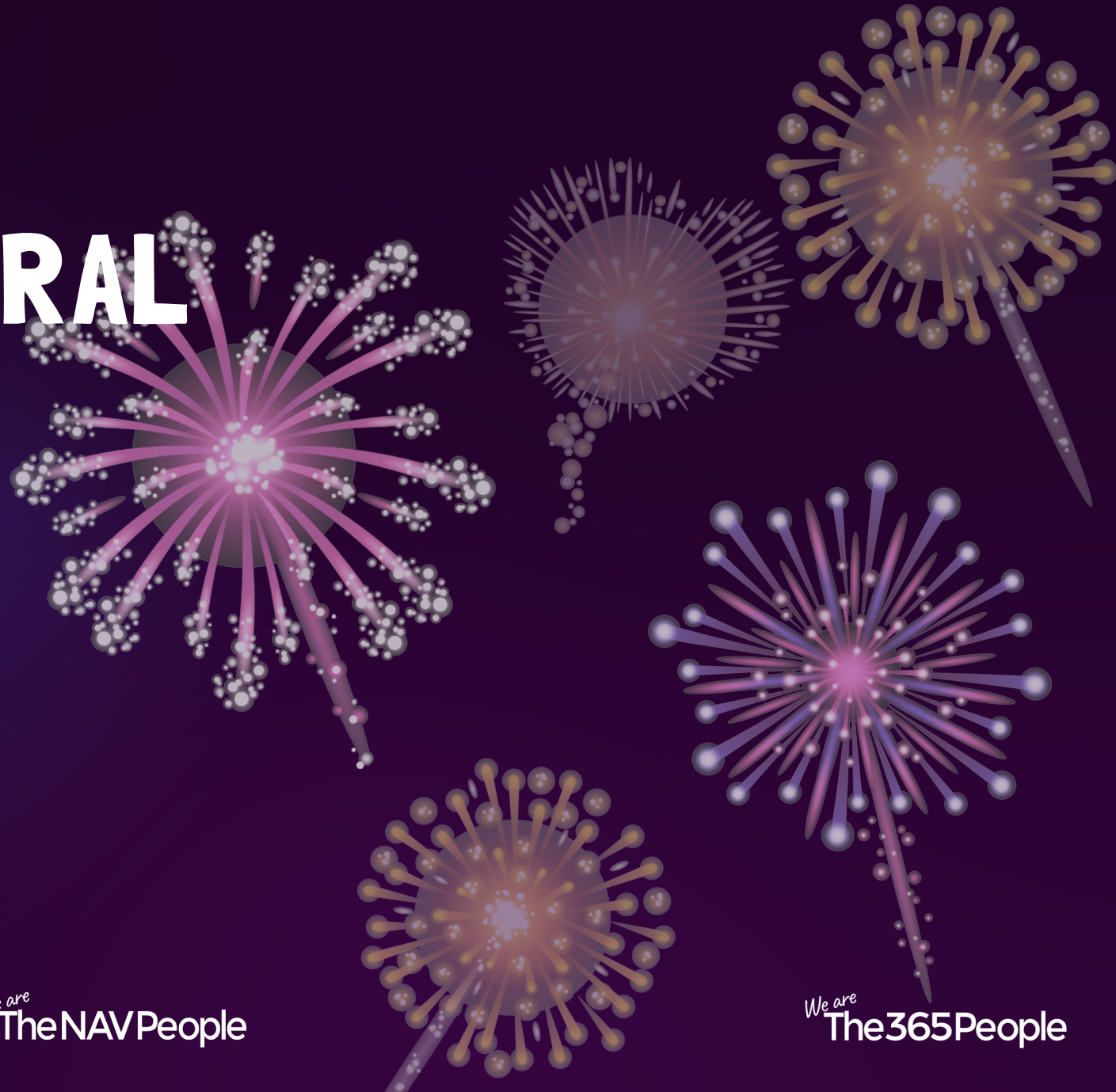
DYNAMICS 365 BUSINESS CENTRAL FOR THE UNFAMILIAR

Andre Verster

We are
The Power People

We are
The NAV People

We are
The 365 People



ERP? WHAT IS IT?

Let's give a little context to this acronym









E – ENTERPRISE
R – RESOURCE
P – PLANNING







	Financial Management	Account receivables/ payables	Bank reconciliation	Fixed asset management	Month/Year end closing
	Sales & Service Management	Quote generation	Contact management	Sales invoicing	Payment processing
	Project Management	Capacity planning	Budgets and estimates	Job and process costing	Resource management
	Supply Chain Management	Inventory and Purchasing control	Shipment and distribution	Returns and cancellations	Procurement and vendor management
	Operations Management	Forecasting	Production planning	Manufacturing capacity	Warehouse management
	Reporting & Analytics	Customer insights	Self-serve reports	Interactive dashboards	Built-in intelligence

RETHINKING DYNAMICS NAV AS A MODERN APP

ACTIONS REPORT

Sales Quote

Sales Invoice

Sales Order

Sales Return Order

Sales Credit Memo

New Document

Sales Journal

Sales Line Discounts

Credit Management

Order Status

General

Sales Price Worksheet

Sales Prices

List Price Sheet

Price

Navigate

History

Inventory - Sales Back Orders

Customer - Order Summary

Reports

Role Center

► Sales Order

► Sales Quote

Blanket Sales Order

Sales Invoice

► Sales Return Order

► Sales Credit Memo

Items

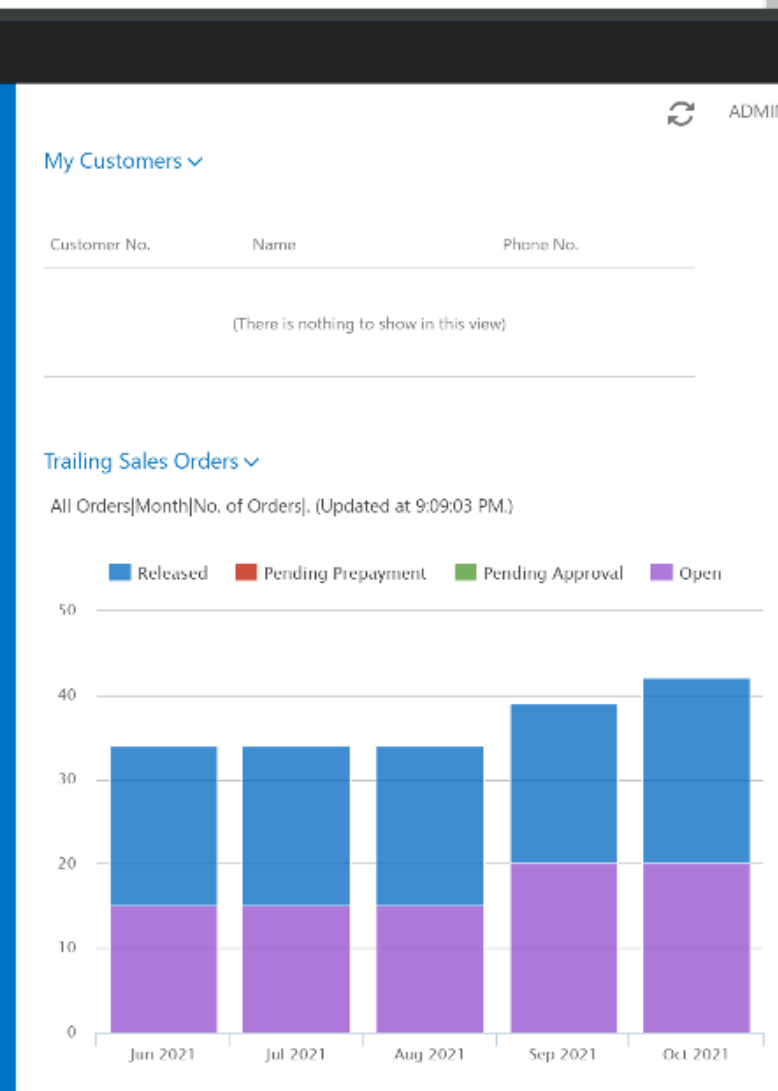
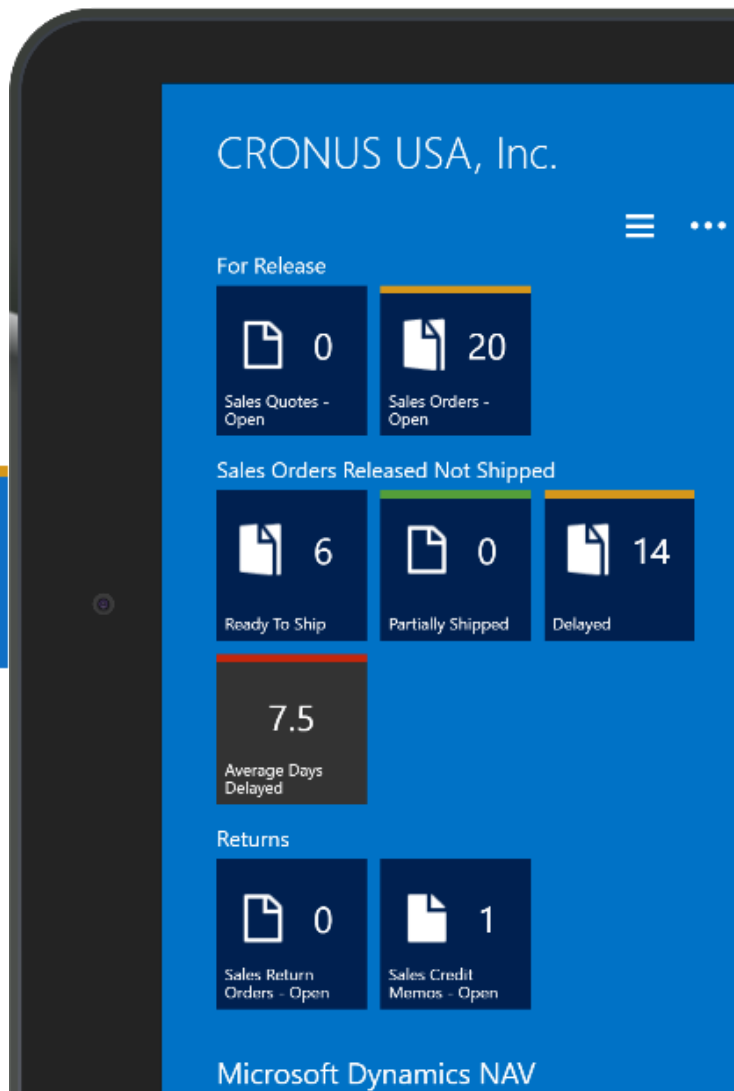
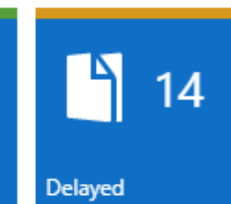
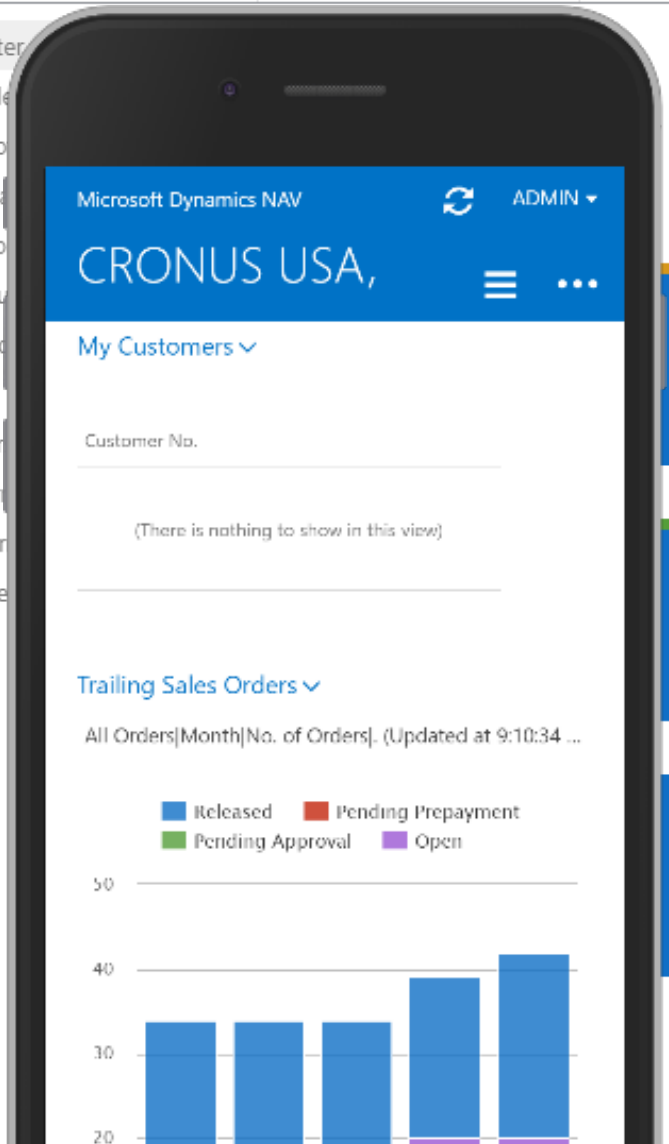
Customer

Item Journal

Sales Journal

Cash Receipt

Inc.



Dynamics 365 Business Central
CRONUS UK Ltd.

Activities

Payments

14

Purchase Documents Due Today

0

Purch. Invoices Due Next Week

0

Purchase Discounts Next Week

Document Approvals

9

POs Pending Approval

0

SOs Pending Approval

1

Unprocessed Payments

Financials

Email Status

0

Failed Emails in Outbox

3

Draft Emails in Outbox

0

Sent Emails Last 30 Days

Approvals



Sales

53

Document Approvals

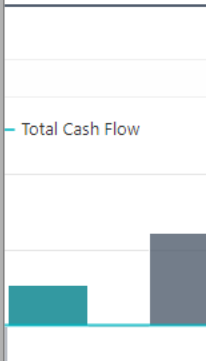
POs Pending Approval

9

SOs Pending Approval

0

Total Cash Flow



Dynamics 365 Business Central
CRONUS UK Ltd.

Chart of Accounts

Bank Accounts

Customers

All

Balance

Vendors

Purchase Orders

Incoming Documents

Purchase Invoices

EC Sales List

VAT Returns

Budgets

VAT Statements

Intrastat

<https://businesscentral.dynamics.com/tablet#>

Department

General

Purchases

Sales

Finances

Activities

CRM

Warehouse

Manufacturing

Jobs & Service

Items

Customers

Vendors

Contacts

Locations

Receive Em

Finance Performance

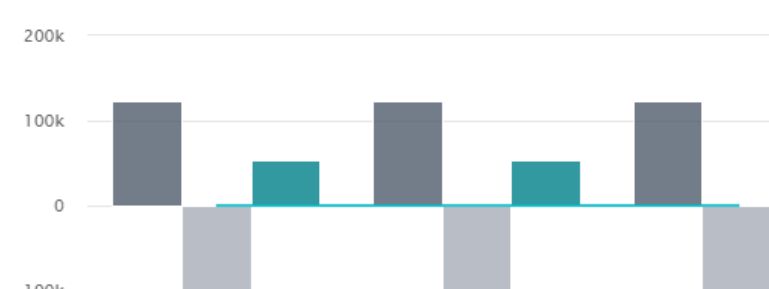
Cash Flow | Month (Updated 14:26:50)

Total Receivables

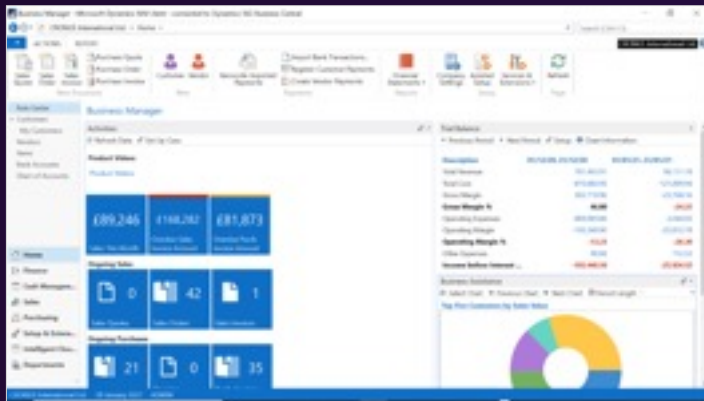
Total Payables

Total Liquid Funds

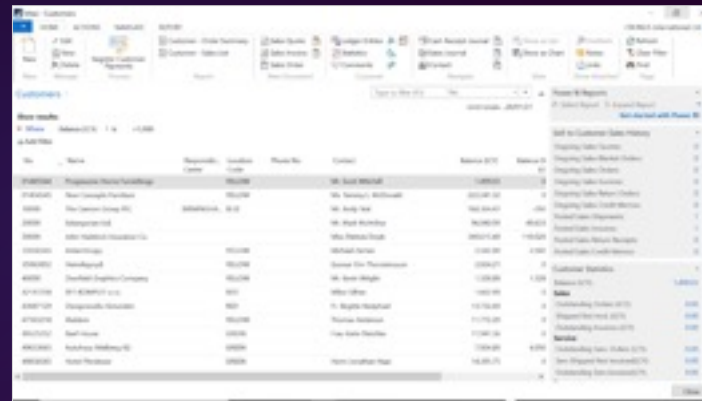
Total Cash Flow



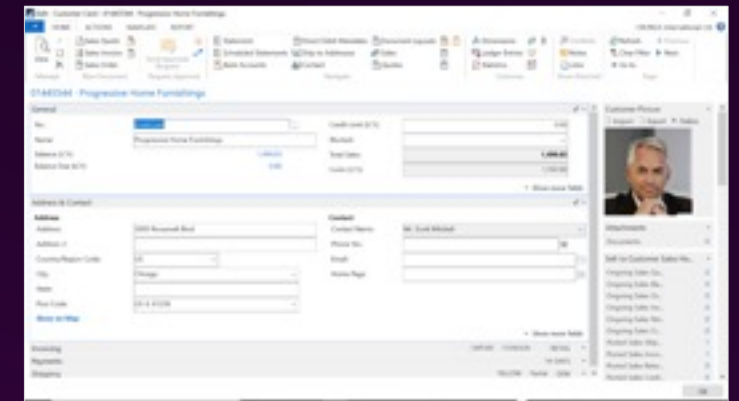
COMPARING POPULAR PAGE TYPES



Role Center



Lists



Cards & Documents



ACTIONS

REPORT

CRONUS International Ltd. ?

Sales
QuoteSales
OrderSales
Invoice Purchase Quote
 Purchase Order
 Purchase Invoice

Customer



Vendor

Reconcile Imported
Payments

Import Bank Transactions...

 Register Customer Payments
 Create Vendor PaymentsFinancial
Statements ▼
ReportsCompany
SettingsAssisted
Setup
SetupServices &
Extensions ▼Refresh
Page

Role Center

Customers

My Customers

Vendors

Items

Bank Accounts

Chart of Accounts

Home

Finance

Cash Managem...

Sales

Purchasing

Setup & Extens...

Intelligent Clou...

Departments

Business Manager

Activities

Refresh Data Set Up Cues

Product Videos

[Product Videos](#)

£89,246

Sales This Month

£168,282

Overdue Sales
Invoice Amount

£81,873

Overdue Purch.
Invoice Amount

Ongoing Sales

0

Sales Quotes

42

Sales Orders

1

Sales Invoices

Ongoing Purchases

21

0

35

Trial Balance

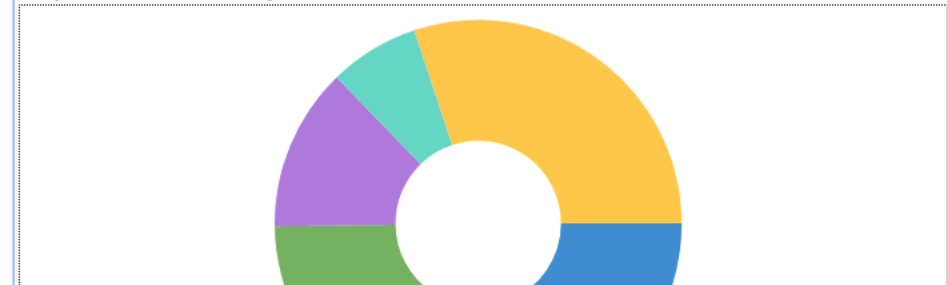
Previous Period Next Period Setup Chart Information

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

Business Assistance

Select Chart Previous Chart Next Chart Period Length

Top Five Customers by Sales Value



Insight from last week

The largest posted sales invoice was for £497,773

○ ○ ●

Activities

Overdue Purchase Documents

19

> See more

Cash Accounts Balance

£552,192

> See more

New Incoming Documents

1

> See more

Actions

- + Sales Credit Memo

+ Purchase Credit Memo

+ Payment Journal Entry

> Panels Selection
- > Payments

> Analysis

> Tasks

> Create
- > Reports

> History

G/L Reports

G Cash Flow
- Customers and Vendors

VAT Reports

Intrastat

Cost Accounting

Payments

Purchase Docu... Due Today

19

>

Purch. Invoices... Next Week

0

>

Purchase Disco... Next Week

0

>

Document Approvals

POs Pending Approval

39

>

SOs Pending Approval

0

>

Financials

Unprocessed Payments

1

>

Incoming Documents

Approved Inco... Documents

0

>

OCR Completed

0

>

Product Videos



Product Videos

Get started



Play Getting Started

Insights

DEPARTMENT

GENERAL

PURCHASES

>

SALES

>

FINANCES

>

ACTIVITIES

>

ITEMS
CUSTOMERS
VENDORS
CONTACTS
LOCATIONS
RECEIVE EMAIL

CRM WAREHOUSE MANUFACTURE JOBS & SERVICE

BUSINESS OVERVIEW

GENERAL

OPEN SOS

27

>

OPEN POS

50

>

SALES THIS WEEK

27

>

JOURNALS

>

LARGE OVERDUE CUST. INV.

0

>

View - Customers

HOME

ACTIONS

NAVIGATE

REPORT

CRONUS International Ltd.

New

Edit

View

Delete

Register Customer Payments

Customer - Order Summary

Customer - Sales List

Sales Quote

Sales Invoice

Sales Order

Ledger Entries

Statistics

Comments

Cash Receipt Journal

Sales Journal

Contact

Show as List

Show as Chart

OneNote

Notes

Links

Refresh

Clear Filter

Find

New

Manage

Process

Report

New Document

Customer

Navigate

View

Show Attached

Page

Customers

Type to filter (F3)

No.

Limit totals: ..28/01/21

Power BI Reports

Select Report

Expand Report

Get started with Power BI

Sell-to Customer Sales History

Ongoing Sales Quotes:0

Ongoing Sales Blanket Orders:0

Ongoing Sales Orders:0

Ongoing Sales Invoices:0

Ongoing Sales Return Orders:0

Ongoing Sales Credit Memos:0

Posted Sales Shipments:1

Posted Sales Invoices:1

Posted Sales Return Receipts:0

Posted Sales Credit Memos:0

Customer Statistics

Balance (LCY):1,499.03

Sales

Outstanding Orders (LCY):0.00

Shipped Not Invd. (LCY):0.00

Outstanding Invoices (LCY):0.00

Service

Outstanding Serv. Orders (LCY):0.00

Serv Shipped Not Invoiced(LCY):0.00

Outstanding Serv.Invoices(LCY):0.00

Show results:

Where

Balance (LCY)

is

>1,000

Add Filter

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

<

>

Close

Views

All

Balance

Customer with Contact Details

Filter list by:

No.

10000..50000

Balance (LCY)

Filter...

Filter totals by:

Date Filter: ..01/09/24

Edit

Reset filters

<div><div></div><div></div></div> <div>10000 <u>The Cannon Group</u> Robert Townes</div> <div>36,794.15 32,385.59</div>	<div><div></div><div></div></div> <div>20000 <u>Trey Research</u> Helen Ray</div> <div>2,494.46 1,738.46</div>	<div><div></div><div></div></div> <div>30000 <u>School of Fine Art</u> Meagan Bond</div> <div>13,331.40 13,331.40</div>	<div><div></div><div></div></div> <div>40000 <u>Alpine Ski House</u> Ian Deberry</div> <div>649.40 649.40</div>
<div><div></div><div></div></div> <div>50000 <u>Relecloud</u> Jesse Homer</div> <div>13,205.52 9,666.72</div>			

Details

Attachments (1)

Customer No. 10000

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

Customer Statistics

Customer No. 10000

Balance (LCY) 36,794.15

Sales

Outstanding Orders (LCY) 125,216.62

Shipped Not Invd. (LCY) 0.00

Outstanding Invoices (LCY) 83,177.20

Service

Outstanding Serv. Orders (LCY) 0.00

Serv Shipped Not Invoiced(LCY) 0.00

Outstanding Serv.Invoices(LCY) 0.00

Payments

Payments (LCY) 170,763.63

Refunds (LCY) 0.00

Last Payment Receipt Date 19/03/2020

Total (LCY) 221,809.58

▼


HOME

ACTIONS


NAVIGATE

REPORT


CRONUS International Ltd. ?




View




Manage



Sales Quote




Sales Invoice




Sales Order


New Document




Send Approval Request




Request Approval




Statement




Scheduled Statements




Bank Accounts



Direct Debit Mandates




Ship-to Addresses




Contact


Navigate




Document Layouts




Sales




Quotes



Dimensions




Ledger Entries




Statistics


Customer



OneNote




Notes




Links


Show Attached



Refresh




Clear Filter




Go to

Page



Previous



Next

01445544 · Progressive Home Furnishings

General

No.:

01445544

Credit Limit (LCY):

0.00

Name:

Progressive Home Furnishings

Blocked:

Balance (LCY):

1,499.03

Total Sales:

1,499.03

Balance Due (LCY):

0.00

Costs (LCY):

1,193.90

Show more fields

Address & Contact

Address

Address:

3000 Roosevelt Blvd.

Address 2:

Country/Region Code:

US

City:

Chicago

State:

Post Code:

US-IL 61236

Show on Map

Contact

Contact Name:

Mr. Scott Mitchell

Phone No.:

Email:

Home Page:

Show more fields

Invoicing

EXPORT

FOREIGN

RETAIL

Payments

14 DAYS

Shipping


YELLOW

Partial

EXW

Customer Picture

Import Export Delete



Attachments

Documents:

0

Sell-to Customer Sales His...

Ongoing Sales Qu...

0

Ongoing Sales Bla...

0

Ongoing Sales Or...

0

Ongoing Sales Inv...

0

Ongoing Sales Ret...

0

Ongoing Sales Cr...

0

Posted Sales Ship...

1

Posted Sales Invoi...

1

Posted Sales Retur...

0

Posted Sales Credi...

0

40000 · Alpine Ski House

Process

Report

New Document

Approve

Request Approval

Navigate

Customer

|

Actions

Related

Reports

Fewer options

General

Show more

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

Address & Contact

Show more

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

Show on Map

Invoicing >

EU

EU

Payments >

1M(8D)

Shipping >

Partial

Statistics >

Details

Attachments (0)

Customer Picture ▼



Sell-to Customer Sales History

Customer No.

40000

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

Customer Statistics

Customer No.

40000

DIRECTIONS FOR GETTING AROUND



MICROSOFT 365 INTEGRATIONS



DATA ENTRY



QUESTIONS?



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

