Product Overview and Capability Guide

Microsoft Dynamics 365 Business Central

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1.

Microsoft Dynamics 365 Business Central

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Microsoft Dynamics 365 Business Central
A Proven Solution for Your Business

Microsoft Dynamics 365 Business Central is multi-language, multi-currency business management solution that helps small and mid-size companies worldwide manage their accounting and finances, supply chain, and operations. Start with what you need now, and easily adapt as your business needs change. In the Microsoft cloud

ONE LOGIN TO YOUR DAY

Microsoft Dynamics 365 Business Central and Office 365 is the winning combination for business. When your email, calendar, and files seamlessly come together with your data, reports and business processes you get an integrated experience that no other stand-alone enterprise resource planning (ERP) solution can match. Share the big picture on your team collaboration site and conveniently drill into the details within Microsoft Dynamics NAV without the need to change from one application to the other. A consistent user experience across devices makes it easy for your people to complete their everyday tasks whether they are in the office or on the go

PARTNERS BOOST SUCCESS FOR SMALL AND MIDSIZE BUSINESSES

Microsoft Dynamics 365 Business Central is sold, implemented, and supported by a global network of solution consultants called partners. These local partners will meet with you to discuss your requirements and then create a price quote based upon your business needs. Ultimately, the price of your solution depends on your specific functionality needs, the number and type of users who will be accessing the system, the needed implementation support, and how you choose to deploy the software.

Microsoft Dynamics 365 Business Central

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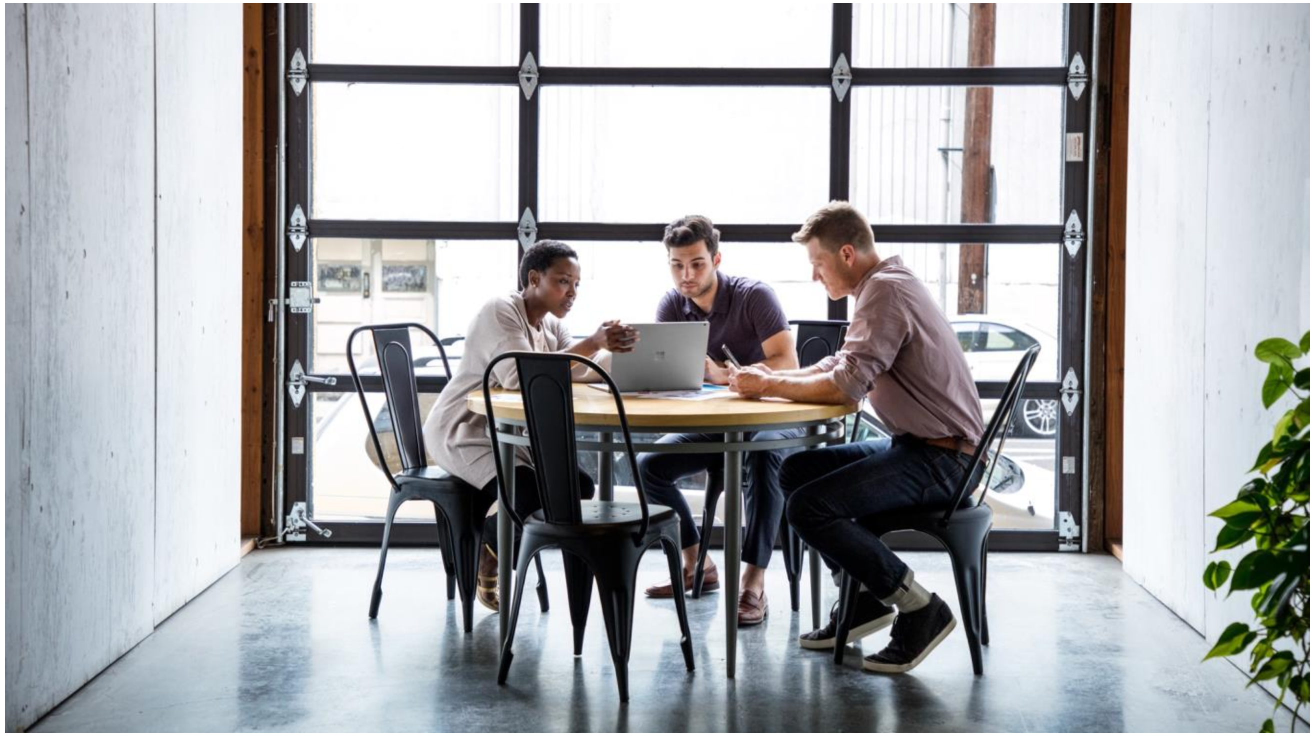
Your complete business in the cloud

Microsoft Dynamics 365 business Central and Office 365



See how easy it is to manage your finances, operations, and grow your sales. View the guided tours to see how Microsoft Dynamics 365 Business Central and Microsoft Office 365 can help you.

2.

How to buy Microsoft Dynamics 365 Business Central

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2. How to buy Microsoft Dynamics 365 Business Central

Microsoft Dynamics 365 Business Central is available exclusively through CSP Partners like us. These partners provide planning, implementation, customization, and support services aimed at optimizing the solution for each customer's specific needs. Regardless of how and where the software is deployed, customers have the choice of purchasing their Microsoft Dynamics 365 Business Central licenses with a monthly, annually or tri-annual commitment

Business Central, licensed by assigned user, is available with Essentials or Premium levels of capabilities. Customers may deploy Business Central Essentials and Business Central Premium in separate environments, on the same tenant. However, licensed users can only access the environment for which they are entitled.

BUSINESS CENTRAL ESSENTIALS

Business Central Essentials provides a wide range of operational and management capabilities, including

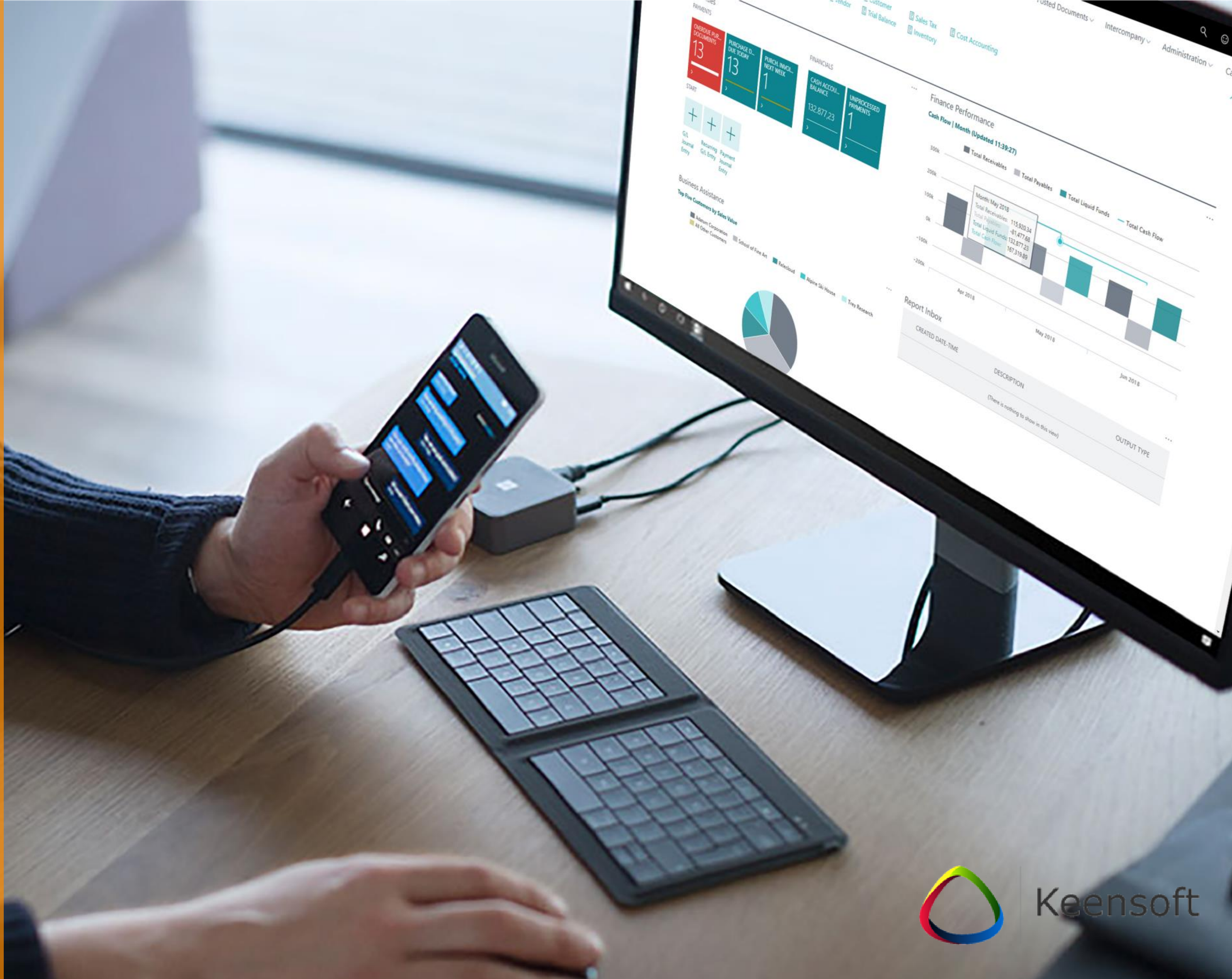
- ✓ Financial Management
- ✓ Human Resources Management
- ✓ AI-Supported Forecasting
- ✓ Customer Relationship Management
- ✓ Project Management
- ✓ Supply Chain Management
- ✓ E-Services
- ✓ Warehouse Management
- ✓ Inventory

BUSINESS CENTRAL PREMIUM

Business Central Premium is licensed by assigned user and includes all Essentials license capabilities plus Service Order Management and Manufacturing

3.

Product Capabilities in Microsoft Dynamics 365 Business Central



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General

Accounts Schedules

Powerful financial reporting tool that can help accountants and financial analysts to extract the most essential business data from the chart of accounts, budgets, cash flow accounts and cost types into financial reports, which can be used to efficiently monitor the health of the business and provide valuable input for the business decision makers. You get to choose the accounts you want to monitor and report on, change the order of the accounts, and combine figures in various ways, set up which columns to print, change the description of the accounts and supply them with additional notes. In addition, you can make simple calculations on the data you selected on the account schedules worksheet, and compare current figures with historical ones and with your budgets

Basic General Ledger

This module includes all the basic functionality necessary for setting up a company and posting to the general ledger, chart of accounts, general journals, VAT facilities including Making Tax Digital connections, recurring journals, and source codes. Also includes:

- ✓ Facilities for internal and external reporting.
- ✓ RapidStart Services for Microsoft Dynamics 365 Business Central
- ✓ Workflow for approval of sales and purchase documents.
- ✓ Posting and reporting in your company's base currency.
- ✓ Posting and reporting in an additional currency with the addition of the Multiple Currencies module.
- ✓ Capability to export data from any form to Microsoft Word or Microsoft Excel® using style sheets.
- ✓ Capability to link to external documents.
- ✓ Set up sales and purchase documents archiving.
- ✓ Background posting.

Allocations

Allocate general ledger entries to combinations of accounts, departments, and projects using allocation keys based on amount, percentage, or quantity. This feature is available through Recurring General Journals.

Budgets

Work with budgets in general ledger accounts. After you have created a budget, you can print a balance that shows variances to the budget by percentage. Work with multiple budgets at one time. For example, work with a 100 percent budget, a 110 percent budget, and so on. Budgets are generally entered per period for the relevant general ledger accounts. Budgets can be exported/ imported to/from Excel, allowing you to use all the calculation capabilities of Excel while preparing your budgets

Change Log

Log user changes made to Microsoft Dynamics 365 Business Central master data. You can log all direct modifications a user makes to the data in the database, except for changes to "working documents" such as journals, sales orders, and purchase orders. The change log functionality makes it possible to get a chronological list of all changes to any field in any table (except those "working documents" just mentioned) and to identify by user ID who made the changes.

Deferrals

Set up deferral templates that automate the process of deferring revenues and expenses over a pre-defined schedule. This enables companies to easily recognize revenues and expenses in periods other than the period in which the transaction is posted.

FINANCIAL MANAGEMENT

Consolidation

Consolidate companies in Microsoft Dynamics 365 Business Central. The companies can come from one or from several different Microsoft Dynamics 365 Business Central databases or other files, and you can import and export financial information in this module. If data used is retrieved from several Microsoft Dynamics 365 Business Central solutions, use this module only in the parent company.

Intercompany Postings

Manage accounting for more than one company in the same posting process. The companies can be in the same or in one of several different Microsoft Dynamics 365 Business Central tenants. You can also send documents to partner companies. Users control the document flow through an Inbox/Outbox feature, and transactions are completed as general journal transactions or through receivables and payables, which enables the use of currencies and correct reconciliation

Responsibility Centers

Set up profit centers and/or cost centers. A company can sell items with specific prices and that are related to a responsibility center. You can tie a user to a responsibility center so that only sales and purchase documents related to the particular user are displayed. Users get assistance with entering extra data, such as dimensions and location codes.

Cash Flow Forecast

Cash Flow Forecast provides a prediction of how a company's liquidity—cash and other treasure positions—will evolve over time. It consists of two things—cash receipts and cash disbursements—the money you expect to receive and the cash you expect to pay out—plus the liquid funds you have available. These elements together show you a direct cash flow forecast. You can also create a basic cash flow forecasting set up, which can be extended as required, and is quick to adjust. Use a wizard to help you complete most of your tasks, and take advantage of automatic daily or weekly data updates

Cost Accounting

Cost Accounting provides an efficient way to control the company's costs by providing visibility and insight into budgeted and actual costs of operations, departments, products, and projects. Cost Accounting synchronizes cost information with the general ledger, and then allocates that information to different costs centers and cost objects. This module includes enabling you to:

- ✓ Transfer costs from the general ledger.
- ✓ Enter and post internal charges and allocations directly in the Cost Accounting Cost journal.
- ✓ Predefine recurring cost allocation rules on cost allocation cards and execute in a batch job.
- ✓ Undo allocations.
- ✓ Create cost budgets and transfer cost budget entries to actual entries

Basic Fixed Assets

Keep track of fixed assets such as buildings, machinery, and equipment. You can also post various fixed-asset transactions: acquisitions, depreciation, write-downs, appreciation, and disposal. For each fixed asset, you set up depreciation books in which the methods and other conditions used for calculating depreciation are defined. You can set up an unlimited number of depreciation books to satisfy legal requirements, and for tax and internal accounting purposes. This module is well suited for international companies that need to use many depreciation methods.

Fixed Asset Allocations

Allocate different percentages of fixed asset transactions, such as acquisition cost and depreciation, to different departments or projects by using allocation keys. Useful for when several departments share a fixed asset

Fixed Asset Insurance

Keep track of insurance coverage and annual insurance premiums for your fixed assets and easily determine whether your assets are under-insured or over-insured. You can attach each asset to one or more insurance policies and also index insurance amounts.

FINANCIAL MANAGEMENT

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Fixed Asset Maintenance

Record maintenance and service expenses for each fixed asset. Get the detailed information you need to analyze and make decisions about the renewal and disposal of fixed assets.

Fixed Asset Reclassification

Reclassify a fixed asset or part of a fixed asset—for example, from one department to another. You can split one fixed asset into several fixed assets or combine several fixed assets into one fixed asset. When you need to dispose of one part of a fixed asset, you can split it into two assets and then dispose of the appropriate one

Basic Dimensions

Add two additional dimensions to the general ledger and to any of the other ledgers in Microsoft Dynamics 365 Business Central for greater flexibility when working with analytical tools. You can give the two dimensions the names that are most appropriate for your business and assign dimension codes to each transaction that involves a general ledger account, customer, vendor, fixed asset, resource, job, or inventory item. In addition, you can define default dimension values and rules for the default values for all account types (general ledger, customer, vendor, item, and so on) to help you easily add dimensions to all transactions. This module can be used in companies that, for example, have several projects, regions, or profit centers.
You can also use it to:

- ✓ Closely analyze projects in companies that work with projects across departments and functions.
- ✓ Generate a statement of operations for a company car account, where the individual automobiles are set up as projects.
- ✓ Establish a single account for all company cars, even though a detailed statement per car is called for.
- ✓ Print a balance for a given department or project or for combinations of the two

Advanced Dimensions

Advanced Dimensions provides unlimited dimensions for use in transactions in all ledgers. You can name all the dimensions according to what is most appropriate for your business. In addition to an unlimited number of dimensions, this module includes advanced dimensions functionality that enables you to set up rules for how to combine dimensions and dimension values. This helps you control the use of dimensions and increases the reliability of output based on dimensions. You can also:

- ✓ Set up rules for prioritization of default values and define dimension rules to fit your specific business.
- ✓ Set up and use analysis views to analyze general ledger transactions per dimension and combine dimensions as you want.
- ✓ Include budget information in analysis views, which is an advanced way of analyzing data using dimensions.
- ✓ Combine analysis of dimensions with the use of account schedules

Prepayments

Prepayments are payments that are invoiced and posted to a sales or purchase order before you post the final invoice. For example, you might require a deposit before you manufacture items to order, or you might require payment before you ship items to a customer. You can use the prepayments capabilities to invoice and collect deposits from customers, and to remit deposits to vendors. This way, all relevant payments are posted against the same invoice

Unlimited Companies

Provision unlimited companies on the same instance of Microsoft Dynamics 365 Business Central, each with their own set-up and configuration

Payroll Import

To account for salary payments and related transactions, you must import and post financial transactions made by your payroll provider to the general ledger. To do this, you first import a file that you receive from the payroll provider into the **General Journal** page. Then you map the external accounts in the payroll file to the relevant G/L accounts.

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Human Resource Management (HRM)

Multiple Currencies

Manage multiple currencies throughout the system, including payables and receivables, general ledger reports, resource and inventory items, and bank accounts (when integrated with the Cash Management features). With Multiple Currencies, you can:

- Enter exchange rates and convert currency in full compliance with euro legislation (including "triangulation") in the European Monetary Union (EMU) countries. Triangulation is the required method of currency conversion during the transitional period of the euro.
- Perform currency conversion according to exchange rates that are stored and maintained in the exchange rate table.
- Set up a currency in the exchange rate table and specify the format so that amounts will always be shown in the correct format on all forms and reports throughout the system.
- Enter exchange rates for a date or for a period in the exchange rate table.
- Calculate the exchange rate associated with the date on the transaction for each conversion of a currency amount to a local amount.
- Save historical exchange rates in the exchange rate table to keep track of fluctuations over a period of time.
- Transact business in any number of currencies for any customer and vendor. For example, companies can issue an invoice in one currency and accept payment for that invoice in a different currency.
- Manage currency conversion dynamically and help ensure efficient processing of exchange rate updates.
- Store details of transactions involving receivables and payables in local and foreign currencies so that aging and reports for receivables and payables can be printed in local or foreign currency.
- Use the Exchange Rate Adjustment option to adjust receivables and payables and post unrealized gains/losses to the general ledger

Cash Management

Bank Account Management

Create, operate and manage multiple bank accounts for catering to your diverse business needs and across different currencies

Reconciling of Incoming & Outgoing Bank Transactions

Import bank transaction data from electronic files sent from your bank in ISO20022/SEPA format—or use the Bank Data Conversion Service for other file types. Apply the bank transactions automatically to open customer and vendor ledger entries and create your own mapping rules. Review the proposed applications and account mappings in an easy and intuitive way. It is possible to modify the algo algorithm behind the record matching is possible by modifying, removing or adding rules.

Basic Account Reconciliation

Import bank statement data from electronic files sent from you bank in ISO20022/SEPA format—or use the Bank Data Conversion Service for other file types. Reconcile your bank statement data automatically to open bank account ledger entries and keep track of all bank statements. You can also Reconcile your bank payments in the Payment Reconciliation Journal, completing payments and reconciliation in one place and in one step. Now you can match customer payments, vendor payments, and bank transactions all in the Payment Reconciliation journal. You can also filter the statement information to view only the transactions that need attention, hiding those that do not. You can see a summary of outstanding bank information and drill-down to see the detail in payment reconciliation. To verify before posting the reconciliation, you can print the outstanding bank information on a test report

Sales & Receivables

Alternative Ship-Tos

Set up multiple ship-to addresses to accommodate customers that in addition to a main business address have more than one site to which order can be shipped. These additional locations can then be selected by the order processor when creating a sales order or invoice.

Basic Receivables

Set up and maintain the customer table. Post sales transactions in journals and manage receivables; register customers and manage receivables using general journals. Together with Multiple Currencies, this module can post sales transactions and manage receivables in multiple currencies for each customer. Basic Receivables is integrated with Basic General Ledger and Inventory and is required for the configuration of all other Sales and Receivables module. Sales Invoicing is also frequently used with this module.

Calendars

Set up calendars with working and non-working days. Assign a base calendar to customers, vendors, locations, companies, shipping agent services, and the service management setup— and make changes to each as necessary. Calendar entries will be used in date calculations on sales orders, purchase orders, transfer orders, production orders, service orders, and requisition and planning worksheets

Order Promising

Promise accurate order shipment and delivery dates to customers based on an item's current and future availability. When items are not available to meet a customer's requested delivery date, calculate the earliest shipment date as either an available-to-promise date that is based on upcoming uncommitted supply or a capable-to-promise date—a date when items can become available should they be replenished.

Campaign Pricing

Work with sales prices and sales line discounts connected with specific campaigns. After you have activated the prices/ discounts, any customer or contact related to a company currently in a segment associated with a given campaign can access the price/discount associated with that campaign. Prices are valid for the life of the campaign or until you decide to deactivate them. When you create a sales document or service order, the campaign price/discount is included among the pricing reductions available when Microsoft Dynamics 365 Business Central chooses the price to retrieve on the line

Sales Invoicing

Set up, post, and print customer invoices and sales credit memos. This module is fully integrated with General Ledger and Inventory.

Sales Invoice Discounts

Calculate invoice discounts automatically. Set up any number of invoice discount terms, including a certain minimum amount, discount percentage, and/or a service charge. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice. Calculations can be done in both local and foreign currencies.

Sales Line Discounting

Manage flexible item price discount structures that differentiate between special agreements with individual customers and customer groups, and are conditioned by such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best unit price, as based on the highest discount, unit price is calculated for the sales line when the order details meet the conditions specified in the sales line discounts table

Sales & Receivables

Sales Line Pricing

Manage flexible item price structures that differentiate between special agreements with individual customers and customer groups, and are conditioned by such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best, that is, the lowest, unit price is brought to the sales line when the order details meet the conditions specified in the sales prices table. Make updates and changes to the price agreements as recorded in the sales prices table by using the sales price worksheet.

Sales Order Management

Manage sales quotes, blanket sales orders, and sales order processes. Setting up an invoice directly differs from setting up a sales order in which the quantity available is adjusted as soon as an amount is entered on a sales order line. Quantity available is not affected by an invoice until the invoice is posted. Use the Sales Order Management module to:

- ✓ Manage partial shipments.
- ✓ Ship and invoice separately.
- ✓ Create prepayment invoices for the sales order.
- ✓ Use quotes and blanket orders in the sales phase. (Quotes and blanket orders do not affect inventory figures.)

Sales Return Order Management

This module enables you to create a sales return order, so you can compensate a customer for wrong or damaged items. Items can be received against the sales return order. Create a partial return receipt or combine return receipts on one credit memo. Link sales return orders with replacement sales orders.

Shipping Agents

Set up multiple shipping agents (for example, UPS, DHL, external carriers, or your own carrier) and relate their services (express, overnight, standard) with shipping time. Associate default shipping agents and their services with individual customers or specify those details on sales orders and transfer orders to improve accuracy of order promising.

Purchase & Payables

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Human Resource Management (HRM)

Alternative Order Addresses

Set up multiple addresses to manage orders from vendors that in addition to a main business address have more than one site from which they ship orders. These additional locations can then be selected by the purchasing agent when creating a purchase order or invoice

Basic Payables

Set up and maintain a vendor table, post purchase transactions in journals, and manage payables. Includes the vendor table and enables you to generate vendor ledger entries using general journals. Use this together with the Multiple Currencies module to post purchase transactions and manage payables in multiple currencies for each vendor. This module is always used if your solution requires a vendor table. It is integrated with General Ledger and Inventory and it is required for the configuration of all other Purchase and Payables module. Purchase Invoicing is also frequently used with this module.

Drop Shipments

Handle order shipments directly from the vendor to the customer without having to physically stock items in your inventory while still keeping track of order costs and profit. The drop shipment process is facilitated through the automatic linking of sales and purchase orders that control the built-in sequence of posting tasks.

Purchase Invoicing

Set up, post, and print purchase invoices and purchase credit memos. This module is integrated with General Ledger and Inventory

Purchase Return Order Management

Create a purchase return order in order to compensate your own company for wrong or damaged items. Items can then be picked from the purchase return order. You can set up partial return shipments or combine return shipments in one credit memo and link purchase return orders with replacement purchase orders

Purchase Line Discounting

Manage multiple item purchase price discounts that you have negotiated with individual vendors as based on such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best, as based on the highest discount, unit cost is calculated for the purchase line when the order details meet the conditions specified in the purchase line discounts table

Purchase Invoice Discounts

Calculate invoice discounts automatically. The discount can differ from vendor to vendor with different minimum amounts (also in different currencies) and different rates, depending on the size of the invoice. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice.

Purchase Line Pricing

Manage multiple item purchase prices that you have negotiated with individual vendors as based on such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best, that is the lowest, unit cost is brought to the purchase line when the order details meet the conditions specified in the purchase prices table

Purchase Order management

Manage purchase quotes, blanket orders, and purchase order processes. Creating a purchase order differs from creating a purchase invoice directly. The quantity available is adjusted as soon as an amount is entered on a purchase order line, but it is not affected by a purchase invoice until the invoice is posted. Use this module to:

- ✓ Manage partial receipts.
- ✓ Receive and invoice separately and create prepayment invoices for the purchase order.
- ✓ Use quotes and blanket orders in the purchase phase. (Quotes and blanket orders do not affect inventory figures.)

Inventory

Analysis Reports

Provide company decision-makers, especially those with overall responsibility for sales, purchases, and product portfolio management, with an efficient and flexible way to get meaningful information out of the system to inform dayto-day decisions. Built on item entries, this module provides a customizable, analytic view that enables people to add and combine analysis objects—customers, items, and vendors— according to their needs. You can:

- ✓ Present figures in both amounts and quantities and compare by periods as well as against budget. When the figures are put in a formula, they can become an indicator of the company's performance.
- ✓ Drill down to locate the cause of problems.
- ✓ View sales dynamics; analyze inventory turnover; evaluate customers' buying behavior; spot trends; reconsider product offerings, prices, and vendors; and make informed business decisions

Alternative Vendors

Manage purchase of the same item from several different vendors. Set up alternative vendors for an item, specify typical lead times used by a specific vendor to deliver that item, and associate price and discount agreements for that item with each vendor

Basic Inventory

Set up items that you carry in your stock and specify their unit of measures, costing method, inventory posting group, unit cost and price and other properties. Post item transactions, such as sales, purchase, and negative and positive adjustments from item journals. Quantity and cost records of the posted transactions are stored in the inventory ledger that is the basis for inventory valuation and other costing calculations. Integrated with General Ledger and with the posting processes in Sales and Receivables and Purchase and Payables, this module is required for the configuration of all other Inventory modules.

Bin

Organize your warehouse by assigning items to bins, the smallest unit in the warehouse logical structure. Bin assignment is done as according to the item journals or directly on the document lines (does not apply to order lines)

Cycle Counting

Manage cycle counting, a basic method of verifying inventory record data used to maintain and increase inventory accuracy. Set up cycle counting on the item or SKU level.

Item Budgets

Make sales and purchase budgets on the customer, vendor, and item levels, and in both amounts and quantities. Prepare and record a sales budget that can serve as input to decisionmakers in other operational areas, such as purchasing and logistics. Decision-makers gain information about future expected demand that they can use for business discussions with the customers. After budgets are made, track the actual sales performance by means of calculating the variance. The ability to move budgeted figures between the system and Excel provides additional flexibility to the budgeting process

Item Charges

Manage item charges. Include the value of additional cost components such as freight or insurance into the unit cost or unit price of an item

Item Cross References

Quickly and precisely identify the items a customer is ordering on the basis of item numbers other than your own. Cross-reference information from customers, vendors, and manufacturers, as well as generic numbers, universal product codes (UPCs), and European article numbers (EANs) that can be stored and easily accessed

Inventory

Item Substitutions

Link items with the same or similar characteristics so that if a customer orders an item that is unavailable, you can offer substitute items and avoid losing the sale. Or, provide an extra service to your customer by offering lower-cost alternatives

Item Tracking

Manage and track serial and lot numbers. Assign serial or lot numbers manually or automatically, and receive and ship multiple quantities with serial/lot numbers from a single order line entry.

Item Categories

Use item categories to group items into a hierarchical structure and you can define your own custom categories, assigning attributes to each category. When you add items to a category, the items inherit the attributes of the category, ensuring a common set of attributes on items in the same category, and saving you time. If required, you can still assign item specific attributes to particular items.

Item Attributes

Use item attributes to add custom data, such as color, country of manufacture, size, or product dimensions, to applicable items, supplementing built-in global item fields. You can define your own type of attribute options, including list, text, integer, and decimal, along with unit of measure for the two latter numeric types. Attribute names and option list entries can also be translated to support multiple language requirements. You can also block attributes or attribute option values from being used in the future, for example, if they are no longer applicable. When you add items to sales and purchase documents, or just organize your items, you can view and filter on the attribute values to limit the list of items to choose from or take action on.

Assembly management

Specify a list of sellable items, raw materials, subassemblies and/ or resources as an Assembly Bill of Materials that comprises a finished item or a kit. Use assembly orders to replenish assembly items, to stock or capture the customer's special requirements to the kit's bill of materials directly from the sales quote, blanket, and order line in the assembly-to-order processes

Location Transfers

Track inventory as it is moved from one location to another and account for the value of inventory in transit and at various locations.

Multiple Locations

Manage inventory in multiple locations that may represent a production plant, distribution centers, warehouses, show rooms, retail outlets and service cars

NonStock Items

Offer items to customers that are not part of your regular inventory but that you can order from the vendor or manufacturer on a one-off basis. Such items are registered as nonstock items but otherwise are treated like any other item

Pick

Enable warehouse workers to create a pick from the released order. Pick is managed from a separate user interface when shipping items in an order-by-order environment.

Put Away

Enable warehouse workers to create a put away from the released order. Put Away is managed from a separate user interface when receiving items in an order-by-order environment

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Human Resource Management (HRM)

Inventory

Standard Cost Worksheet

Efficiently review and update standard costs with this worksheet. The Standard Cost Worksheet provides a company's controllers with a reliable and efficient way to maintain accurate and upto-date inventory costs. Work with standard cost updates the same way you work with an Excel spreadsheet but within the framework of Microsoft Dynamics 365 Business Central. Because it provides an overview of the current standard costs, the worksheet is a convenient place to prepare for a cost update without the changes having an immediate effect in the system.

Stock-Keeping Units

Manage stock-keeping units (SKUs). Identical items with the same item number can be stored in different locations and managed individually at each location. Add cost prices, replenishment, manufacturing information, and so on, based on the location

Warehouse Receipt

Enable warehouse workers to create a put-away from the receipt. Warehouse Receipt is managed from a separate user interface when receiving items in a multi-order environment.

Warehouse Shipment

Enable warehouse workers to create a pick from the shipment. Warehouse Shipment is managed from a separate user interface when shipping items in a multi-order environment

Warehouse Management

Bin Setup

Easily set up and maintain your bins by defining both the layout of your warehouse and dimensions of your racks, columns, and shelves; set up and maintain your planning parameters by defining the limitations and characteristics of each bin.

Internal Picks and Put-Aways

Create pick and put-away orders for internal purposes, without using a source document (such as a purchase order or a sales order). For example, pick items for testing or put away production output

Warehouse Management Systems

Manage items on a bin level. Receive and put away items in a bin; pick items from a bin according to a put-away template; and pick items based on the zone and bin ranking. Move items between bins using a report for optimizing the space usage and the picking process, or move items manually. Warehouse instruction documents are created for the pick and put-away process, which can be carried out for sales, purchases, transfers, returns, and production orders. Service orders are not included.

Basic Manufacturing

Production Bill of Materials

Create bills of materials and calculate standard costs. Required for the configuration of all other Manufacturing modules

Production Orders

Create and manage production orders and post consumption and output to the production orders. After you have created a production order, you can calculate net requirements based on that production order. The Production Orders module includes a manual supply planning tool as an alternative to automatic planning. The Order Planning window provides the visibility and tools you need to manually plan for demand from sales lines and then to create different types of supply orders directly

Agile Manufacturing

Version Management

Create and manage different versions of the manufacturing bill of materials and routings. You must purchase the Basic Capacity Planning module before you can set up multiple versions of routings.

Supply Planning

Basic Supply Planning

Plan material requirements based on demand with support for master production scheduling and materials requirements planning. Basic Supply Planning includes:

- ✓ Automatic production orders and purchase orders.
- ✓ Action messages for fast and easy balancing of supply and demand.
- ✓ Support for bucket-less and bucketed material requirements planning.
- ✓ The Setup for items with their own reordering policy, including registration of whether they are manufactured by or purchased from a third party.

Demand Forecasting

Manage demand forecasting based on items. Input demand (sales) forecasts for products and components in a more convenient way (daily, monthly, quarterly). This data allows the system to plan and create production and purchase orders taking into consideration the demand forecast together with the level of available inventory and parameters of requirement planning.

Sales & Inventory Forecasting

You can use the Sales and Inventory Forecast extension to get deep insights about potential sales and a clear overview of expected stock-outs. The built-in Cortana Intelligence leverages historical data and helps you manage your stock and respond to your customers. Based on the forecast, the Sales and Inventory extension helps create replenishment requests for vendors and saves you time

Capacity Planning

Basic Capacity Planning

Add capacities (work centers) to the manufacturing process. Set up routings and use these routings on production orders and in material requirements planning. View loads and the task list for the capacities

Finite Loading

Manage finite loading of capacity-constraint resources. Taking capacity constraints into account so that no more work is assigned to a work center than the capacities can be expected to execute during a given time period. This is a simple tool without any optimization. Used with the Order Promising module, Finite Loading also enables the system to calculate capable-to-promise (CTP)

Machine Centres

Add machine centers as capacities to the manufacturing process. Machine centers are designed to help you manage capacity of a single machine/producing resource. With machine centers, you can plan/manage capacity on several levels: on a more detailed level for machine centers and on a consolidated level for work centers. Machine centers allow users to store more default information about manufacturing processes, such as setup time or default scrap percentage.

Resources

Basic Resources

Keep track of resources and prices. Register and sell resources, combine related resources into one resource group, or track individual resources. Divide resources into labor and equipment and allocate resources to a specific job in a time schedule.

Capacity Management

Plan capacity and sales and manage usage statistics and profitability of resources. Create your plan in a calendar system with the required level of detail and for the period of time that you need. Also monitor resource usage and get a complete overview of your capacity for each resource with information about availability and planned costs on orders and quotes.

Multiple Costs

Manage alternative costs for resources and resource groups. The costs can be fixed or based on an additional percentage or an additional fixed charge. Define as many work types as you need.

Time Sheet

Time Sheet is a simple and flexible solution for time registration with manager approval. Time Sheet provides integration to the Service, Jobs, and Basic Resources modules

Jobs

Keep track of usage on jobs and data for invoicing the customer. Manage both fixed-price jobs and time-and-materials jobs. You can also:

- ✓ Create a plan for a job with multiple tasks and task groupings. Each task can have a budget and can be done for whatever period of time you need.
- ✓ Copy a budget from one job to another and set up a job-specific price list for charging of items, resources, and general ledger account expenses to the job's customer.
- ✓ View suggested Work in Progress and Recognition postings for a job.
- ✓ Plan and invoice the job in a currency other than the local currency using Jobs together with Multiple Currencies.
- ✓ Assign a specific job to a specific customer and invoice the job completely or partially using Jobs together with Sales Invoicing.
- ✓ Use the new Jobs setup wizard to set up jobs, enter time sheets, and Job Journals more easily, and use the updated Project Manager role center to quickly access common tasks, new charts, and a new My Jobs list.
- ✓ On the Job Card, you can see tasks, use the new Project Manager field, and get better visibility into the costs and billings for your jobs.
- ✓ A new Job Quote report enables you to quickly email a customer the price for a project

Sales and Marketing

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Supply Chain Management (SCM)
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> Purchase & Payables
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Manufacturing
> Basic Manufacturing
> Agile Manufacturing
> Supply Planning
> Capacity Planning

Project Management
> Resources

Sales, Marketing and Service Management
> Sales and Marketing
> Service Management
> Workflow
> E-Services
> Document management

Power Bi Content Pack

Human Resource Management (HRM)

Campaign Management

Organize campaigns based on segments of your contacts that you define. Define segments based on specific criteria, such as sales, contact profiles, and interactions, and reuse existing segments or segmentation criteria. Use the Merge feature in Word (or send other file formats) to communicate with the contacts in your segment. To send a document to people of different nationalities in their native language, use Campaign Management with Interaction/Document Management. .

Relationship Management

You can work more effectively with Relationship Management from your phone, taking advantage of enhancements to the Sales and Relationship Management Role Center. A simplified CRM includes contact management, interactions, and sales opportunities. You can also use improved interactions logging from your phone, logging email messages using Office 365.

Contact Classification

Sort your contacts into categories, and automatically classify your customers based on criteria you specify. For example, you can see the program group contacts in terms of revenue. Use this information to target contacts for your campaigns. Divide your customers into ABC segments and even use this module for rating (assign the weights of two questions to identify the value of a third question)

Contact Management

Maintain an overview of your contacts and personalize your approach to them. Record your contact information for all business relationships. This module is tightly integrated with the Sales and Receivables application area. You can also:

- ✓ Specify the individual people related to each contact.
- ✓ Get an automatic alert if you enter contact information that already exists with the duplicate check function.
- ✓ Get a precise view of prospects and customers by categorizing your contacts based on profiling questions.
- ✓ Issue quotes to prospects or create sales documents for specific contacts if you have Sales Order Management.
- ✓ Use Contact Synchronization to integrate your contacts from Microsoft Dynamics 365 Business Central with your People Hub in Office 365 or Microsoft Outlook.
- ✓ Keep your contacts synchronized between Microsoft Dynamics 365 Business Central and Office 365 or Microsoft Outlook, and automatically run a background synchronization at scheduled times
- ✓ Use filters to synchronize only the Microsoft Dynamics 365 Business Central contacts that you want to see in Office 365 or Microsoft Outlook.

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Sales and Marketing

Interaction/Document Management

Record all the interactions that you have with your contacts— for example, telephone calls, meetings, or letters. Attach documents to interactions (Word, Excel, or .txt files). You can also automatically record other interactions—for example, all Microsoft Dynamics 365 Business Central documents that you send to your contacts, such as sales orders or quotes, can be logged and retrieved at a later time. By using TAPI (Telephony Application Programming Interface) compliant telecom devices, you can call a contact by clicking a button on the electronic contact card

Mail Logging

Log all email correspondence. Log inbound and outbound email messages sent through Microsoft Dynamics NAV or Microsoft Outlook® and set up the program to log automatically or manually in Microsoft Dynamics 365 Business Central. The solution is server-based and requires Microsoft Exchange Server (please refer to the Microsoft Dynamics NAV software requirements) in order for you to keep email messages in their natural environment to ease administration

Opportunity Management

Keep track of sales opportunities. Section your sales processes into different stages and use this information to get an overview of and manage your sales opportunities.

Notifications

You can take advantage of non-intrusive, intelligent in-application notifications, which guide you through relevant processes according to the context you are working in. The new type of notifications help even untrained users carry out advanced tasks, while the unobtrusive design does not prevent you from carrying on with your work. You can also use Microsoft Word templates to create the layout for email notifications, ensuring all messages look consistent and coherent..

Task Management

Organize the tasks related to your sales and marketing activities. Create to-do lists for yourself and assign tasks to other users or teams of users. Automatically create recurring to-do items and activities consisting of several to-do items.

Service Management

Planning & Despatching

Assign personnel to work orders and log details such as work order handling and work order status. For dispatching, manage service personnel and field technician information, and filter according to availability, skills, and stock items. Gain an overview of service task prioritization, service loads, and task escalations.

Service Contract Management

Set up an agreement with the customer concerning the service level to be delivered. With this module, you can:

- ✓ Maintain information on contract history, contract renewal, and contract templates.
- ✓ Manage warranty details on service items and spare parts.
- ✓ Record details on service levels, response times, and discount levels, as well as on the service history of each contract, including used service items and parts and labor hours.
- ✓ Measure contract profitability.
- ✓ Generate contract quotes.

It is recommended that you also use the Service Order Management and Service Item Management modules.

Service Item Management

Record and keep track of all your service items, including contract information, component management, and BOM reference and warranty information. Use the Trendscape Analysis feature to view key performance indicators on the service item in a given time frame.

Service Order Management

Register your after-sales issues including service requests, services due, service orders, and repair requests. Service requests can be initiated by the customer or created automatically according to the terms in your service agreement. Data can be entered in the service orders by a call center employee or by your repair shop. You can also use this module to register impromptu or one-off service orders. Register and manage equipment loaned to customers. Get a complete history of your service orders and service order quotes through the Service Order Log.

Service Price Management

Set up, maintain, and monitor your service prices. Set up price groups based on different criteria—such as the service item (or several item groups), the service task involved, or the type of fault—for a limited period of time, or for a specific customer or currency. Define price calculation structures that include all parameters involved in providing service—for example, the parts used, the different work types, and the service charges. The system automatically assigns the correct price structure to the service orders that match the service price group criteria. You can also assign fixed prices, minimum prices, or maximum prices to service price groups and view statistics about the profitability of each service price group

Workflow

General

Model real-life business processes such as best practices or industry-specific standards. For example, ensure a customer's credit limit has been independently verified or require a two-person approval for a significant vendor payment. Workflows in Microsoft Dynamics 365 Business Central focus on three main building blocks and workflow processes, short or long, are likely to be comprised of steps related to these three blocks, which are:

- ✓ Approval—leave a work task, item, or document in a blocked or unapproved state until approved by a suitable person in your organization.
- ✓ Notification—tell users that something has happened and/ or that they need to take some kind of action.
- ✓ Process automation—execute a process routine and have the Microsoft Dynamics 365 Business Central system calculate something or perform an action.

Along with approval, notification, and process automation, workflows in events react to real parameters in your business. Workflows can be triggered by credit limits, geographies, totals, individual owners, or any one of hundreds of other potential conditions.

Sales & Marketing

Out of the box, Dynamics 365 Business Central supports sales document and customer approval workflows that enable users to submit sales documents and customer verification, for approval according to a predefined hierarchy of approval managers. The approvals can be done with accounting manager or another similar significant role in your company. In this way, you can have workflows that need approval when sales discounts exceed a limit and need approval by sales managers, or you can have notifications sent to account managers when new customers are created in a particular geography

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Human Resource Management (HRM)

Purchase and Integration

Microsoft Dynamics 365 Business Central integration with Optical Character Recognition (OCR) services and purchase workflows go hand-in-hand. External invoices can be received, processed, and generate payment lines with workflows. At any stage a user can change the conditions for automatically processing and have documents sent for approval before processing if they exceed limits or some other condition.

Workflow groups and features

✓ Sales & Purchase Documents
✓ Sales & Marketing
✓ Finance
✓ Integration workflows
✓ Administration
✓ Job queue support for process automation
✓ Email and Microsoft Dynamics 365 Business Central Notes for notifications
✓ Workflow designer

E-Services

Electronic Invoicing

Send and receive electronic invoices and credit memos as either files or using a document exchange service. Out-of-the-box, the PEPPOL format and the free Tradeshift document exchange service are supported, but the architecture allows for adding additional formats or document exchange service software (requires partner customization). In addition, a number of standards used in electronic document exchange are now supported, including a Global Location Number (GLN) ID for customers and vendors, Global Trade Item Number (GTIN) for items, and international codes on units of measures, currencies, tax codes, tax schemes, and countries.

Furthermore, a new Document Sending Profile concept aggregates all tasks around sending documents, be it by email message, print, or file and enables you to set up preferred send behavior defaults for a customer or vendor, or a group of customers/vendors. Received electronic documents are integrated into the document management features, that is, they are stored in Incoming Documents, along with PDF or scanned paper invoices, from which the user can create Purchase Invoices and Purchase Credit Memos, or General Journal Lines, and add text-to-account rules to automatically default account rules based on the vendor or line data. Errors and warnings in connection with the conversion are available for the incoming document, and links to the document enables navigation from any created document, posted document, or ledger entry in Microsoft Dynamics 365 Business Central. Using a free Tradeshift account, documents can be sent to and received from other parties on the Tradeshift network, and delivery status as well as activity logging is available inside Microsoft Dynamics NAV for the document exchange service interaction. Workflow can be added to automatically process any incoming electronic document, for example, from creating the corresponding draft purchase document in Microsoft Dynamics 365 Business Central to posting it and creating payment lines depending on workflow conditions, such as per vendor and/or amount.

Currency exchange rates

Update currency exchange rates using third-party web services that deliver exchange rates as XML files or streams. Updates can be performed manually or automatically using the job queue functionality. Yahoo and European Central Bank (ECB) currency feeds are supported out of the box, and other currency services can be added mapping the data in the feed into the currency exchange rates setup, a task that can be done in the end user client without developer permissions.

SALES, MARKETING & SERVICE MANAGEMENT

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Online Store with Shopify

Connect your Shopify store (or stores) with Business Central and maximize your business productivity. Manage and view insights from your business and your Shopify store as one unit.

Company Hub

Some people work in multiple companies in Business Central and some also work in more than one organisation, such as external accountants or employees and managers of corporations with multiple subsidiaries. For these users, and many others, the company hub serves as a landing page that gives a financial overview across companies and environments. It provides users with a tool for managing work across the various environments that they work in, across companies, environments, and regions.

Industry or Business Extensions

Extend Dynamics 365 Business Central
to fit industry or business needs with integrated add-on apps.

Connect to data sources and services - Excel files, SharePoint lists and CRM records with Microsoft PowerApps.

HUMAN RESOURCES MANAGEMENT (HRM)

Basic Human Resources

Basic Human Resources Efficiently manage your company's human resources. Group and track relevant employee information and organize employee data according to different types of information, such as experience, skills, education, training, and union membership. Store personal information, track job openings in your organization, and extract a list of candidates for these positions. Keep track of benefits and company items such as keys, credit cards, computers, and cars. Easily record all types of absences in units of measure that you define and attach alternative addresses and relatives' names to employees.

4.

Learn More

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4. Learn More

On the Microsoft Dynamics website you can learn about what Microsoft Dynamics solutions can do for your organization and how to get started:

Read more? Click here >

Software License Terms Get specific product software license terms.

License terms? Click here >

On the Microsoft Documentation website to discover how to make the most of Dynamics 365 Business Central with online training and documentation covering product capabilities. Learn how to use Business Central to manage, adapt, and streamline operations like finance, manufacturing, sales, and more, across your small or medium-sized business.

Online Documentation? Click here >

About Microsoft Dynamics 365 Business Central

Microsoft Dynamics 365 Business Central is a quick to implement, simple-to-use business solution from Microsoft with the power to support your business ambitions.

Streamline and connect your entire business:

- ✓ Help to increase productivity and to simplify your business by connecting key functions within your organization.
- ✓ Manage your multilocation or multi-national growing business with global ERP features.
- ✓ With Microsoft Dynamics 365 Business Central and Office 365, share the big picture across your organization by bringing your email, calendar, and files together with your data, reports, and business management software

Learn More
Contact us to find out how Microsoft Dynamics 365 Business Central can help your business.

Or to find out more about Microsoft Dynamics 365 Business Central
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