



MICROSOFT DYNAMICS 365 **BUSINESS CENTRAL**

Function guide



Welcome to Dynamics 365 Business Central

Is your growing business struggling to manage finances, supply chain, service, or operations?

The way we work has evolved rapidly over the past decade, with new business models, advances in artificial intelligence technology, and changes in work environments. Now is the time to move to the cloud and implement the right solutions to help your team deliver greater value to customers no matter where they are working from.

This capability guide provides an overview of the core functionalities of Microsoft Dynamics 365 Business Central. It will help you assess your company's specific needs and identify the next steps in selecting a comprehensive business management solution. Business Central delivers the collaborative capabilities you need to connect your teams through a single solution, enabling your entire organization to adapt faster, work smarter, and perform better.

Business Central product overview

Business Central is a business management solution for small and medium-sized organizations that automates and optimizes business processes, helping you manage your company in a comprehensive way.

Highly adaptable and with a wide range of features, Business Central lets you manage areas such as finance, sales, service, project management, distribution, manufacturing, and much more. You can easily add features relevant to your region of operation and customize them to support even highly specialized industries.

Business Central is characterized by its rapid implementation, ease of configuration, and leadership in innovation in product design, development, implementation, and usability.

A cloud-based solution

Business Central is an all-in-one, cloud-based ERP (Enterprise Resource Planning) solution designed to optimize your business operations. Cloud technologies offer a key advantage in addressing top business priorities and enable organizations to:

- Adapting to new technologies.
- Improve security, privacy, and reliability.
- Enable scalability, flexibility, and easier user onboarding.
- Free up IT resources to focus on high-value work.
- Take advantage of ready-to-use artificial intelligence features.

- Accelerate the acquisition of business insights.
- Staying up-to-date and compliant with regulations.

Microsoft Cloud takes these benefits a step further, allowing you to run your entire digital infrastructure in the cloud. Dynamics 365 integrates with Microsoft 365, providing unprecedented integration between systems and processes to improve productivity and collaboration in a single solution.



Onboarding

The setup of Business Central can be carried out either by customers themselves or by Microsoft partners. While it is recommended to work with a partner who understands your industry, it is also possible to configure Business Central independently.

You can rely on the wide variety of educational resources available on Microsoft Learn, as well as the product's built-in guidance through wizards and interactive tips, which allow you to learn at your own pace.

Microsoft partners can offer preconfigured packages that support specific industries or business domains, so only business-specific settings need to be adjusted. When onboarding new users into the organization, a welcome banner with a first-day checklist can be configured, enabling a successful start with Business Central. In addition, Copilot chat supports onboarding scenarios by bringing educational content closer to users with just a few clicks.

Connected with Microsoft 365

Enhance collaboration, productivity, and people's impact through the use of collaborative applications. When Business Central and Microsoft 365 work together, small and medium-sized businesses can increase productivity and redefine the way work gets done.

By delivering data directly into familiar applications such as Outlook, Excel, and Teams, employees can access the information they need without switching between apps. With OneDrive for Business, users can easily co-author business documents.



Microsoft Teams

Connect Microsoft Teams with Business Central to efficiently share and interact with real-time data, turning Teams into a centralized hub for daily operations. From Business Central, you can quickly share data to start conversations in Teams.

With the Business Central app installed in Teams, users can stay within their workflow by viewing and editing business data directly from group chats or channels. Vendors and customers can be reviewed to check their history without switching applications, and information can be shared with colleagues to make faster decisions. In addition, each department can independently access the critical data it needs to succeed, even for collaborators who do not have a Business Central license.

Microsoft Outlook

At the core of most businesses is a constant commitment to delivering exceptional products and services to customers.

When Business Central and Outlook work together, employees receive valuable business insights directly in their inbox, enabling them to save time and stay focused on delivering exceptional experiences.

Use templates to quickly send payment reminders, order confirmations, and other emails directly from Business Central, connected to your shared mailbox. In addition, you can link real-time data from Business Central with Outlook.

Save time by having visibility into customer and vendor information such as sales, purchase details, and more without leaving your inbox. Set up customers or vendors, create quotes, send invoices, and perform additional actions directly from Outlook, so you can stay focused on the task at hand.

Microsoft Excel

For finance and operations teams, Excel is a fundamental tool that plays a key role in their daily tasks. Enabling these teams to maximize productivity within their preferred application can lead to significant efficiency gains.





Export any data from Business Central to an Excel worksheet to capture information snapshots or share it for review. Save time by updating records in bulk in Excel and uploading the updated records back into Business Central with just a few clicks. Gain timely operational insights from Business Central through Excel reports and adapt quickly by customizing report layouts as Excel spreadsheets. Easily analyze transactions and business data using pivot tables, charts, and calculations to get answers faster.

Optimize collaborative activities such as budgeting and planning through multi-user co-authoring. Create, edit, and access Excel documents as a team, and then publish the final results back to Business Central.

Connected with Power Platform

The integration of Business Central with Microsoft Power Platform delivers a solution that enhances business productivity and efficiency. It provides a set of tools that enable data analysis, solution creation, process automation, and the development of virtual agents.

Use Power Automate to configure and run workflows that connect business process tasks performed by different users.

Gain key insights from Business Central data with Power BI and create custom visualizations and reports. Use Power Apps to build the ideal application for your business domain, leveraging Business Central data and processes while maximizing productivity.

With Copilot Studio, you can create conversational experiences that connect to Business Central knowledge and data and can operate independently. With Power Pages, you can develop low-code business websites that deliver key information and services to your customers.

Take your business with you

Access your Business Central data from your mobile device. Browse your company information and use features such as exporting to Excel or Microsoft 365, viewing updated charts and KPIs, sending quotes and invoices by email, and taking and attaching photos with your camera.

The Business Central mobile app is available for download on the Apple App Store and Google Play Store, allowing you to stay connected and manage your business efficiently, wherever you are.

Copilot and Artificial Intelligence

Increase productivity, boost creativity, and eliminate repetitive tasks with Copilot, your AI-powered assistant.

Microsoft Copilot is the world's first AI assistant designed to span all areas of the business. With Copilot in Business Central, small and medium-sized organizations empower their employees with intuitive AI tools that save time and make Business Central easier to learn and use. Copilot does not require complex configurations or extensive AI training to start using it.

Security and Privacy with Copilot

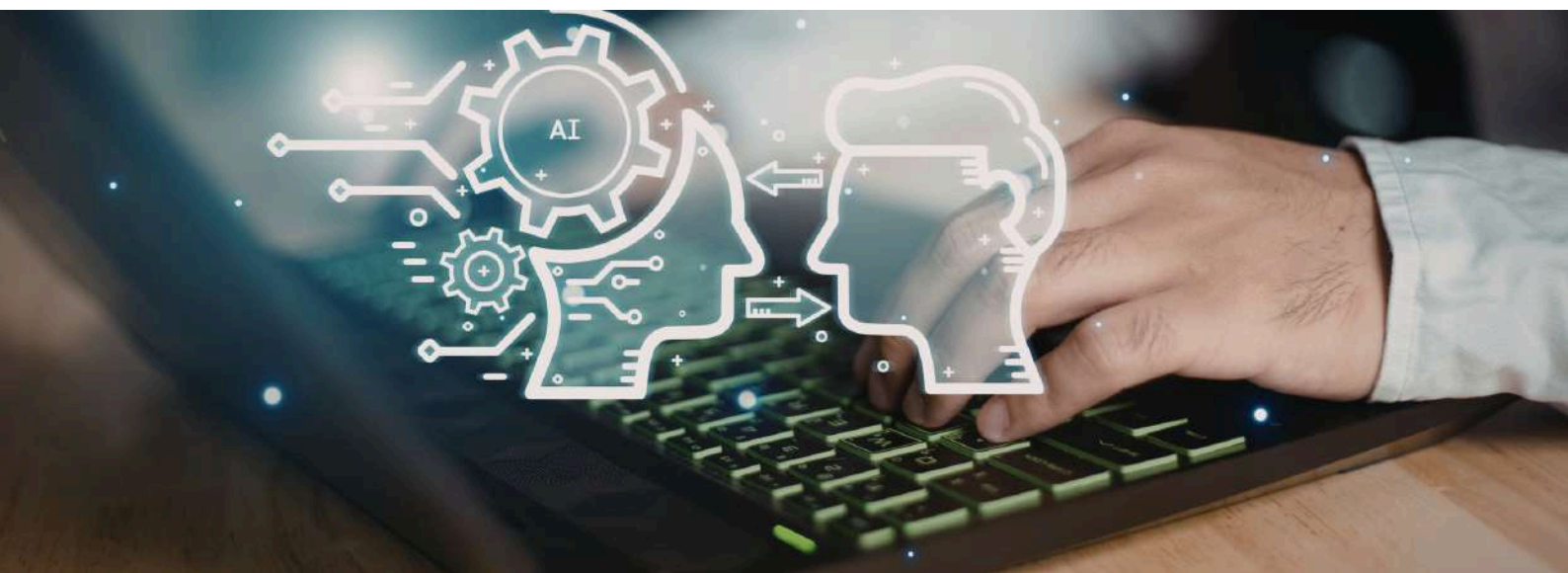
Copilot is an integral part of Business Central. By enabling the use of Copilot within Business Central under your own governance, the risk of employees transferring business data to external AI applications outside of your control is reduced.

Copilot is built on Microsoft Cloud and designed for enterprise use, with the security, privacy, and compliance controls that our customers expect. It can be used by any Business Central user who is granted access.

Copilot respects existing permissions and data policies, and its responses are based solely on the information you have access to.

Your business data, prompts (inputs), and Copilot responses (outputs or results):

- Are not viewed by Microsoft.
- Are not available to other customers.
- Are not used to train or improve Microsoft's AI models or third-party models (such as OpenAI models).
- Are not stored outside your organization's compliance boundary.





Responsible AI

Copilot in Business Central adheres to Microsoft's Responsible AI principles, which include fairness, reliability, safety, privacy, security, inclusiveness, transparency, and accountability. As it is integrated with Dynamics 365 and Power Platform, Copilot inherits their security, privacy, and compliance measures, such as multi-factor authentication and compliance boundaries.

You can control access through permissions, and authentication mechanisms ensure data segregation between tenants. Copilot uses secure technology to manage data that only you can access.

Copilot's responses are continuously improved to ensure accuracy, and you can always review and edit AI-generated content. Our teams proactively address misinformation, content blocking, data security, and harmful content, following Responsible AI principles. Additionally, you can always review the information sources that Copilot cites.

Copilot Capabilities in Business Central

Copilot includes a continuously expanding set of capabilities that help users in different roles and tasks. Look for the Copilot icon in this guide to identify where Copilot can assist you within Business Central.

Chat with Copilot

Save time for important work by asking Copilot in Business Central to find business data or explain concepts, all using natural language. Use the chat to search for and open information about entities or records related to business processes, such as customers, vendors, sales orders, items, and more.

Get explanations or step-by-step guidance on various tasks and understand the purpose and typical use of individual fields.

Autofill Fields with Copilot

Save time and reduce errors during data entry with Copilot. Copilot now suggests appropriate values for fields, allowing you to simply accept them instead of typing them manually.

Autofill is available on document pages such as customers, sales orders, items, and even on your own custom pages. Copilot proposes the value, giving you the opportunity to review it before confirming.

Summarize with Copilot

Whether you are reviewing the details of a customer, a large order, or any other record, you may spend a considerable amount of time understanding the current status of your data and the relevant fields.

Copilot summarizes a record in a few brief sentences, significantly reducing the effort required to gain insights from your data and plan the next step. Interact with the summary to navigate, explore, and act quickly on your information.

Copilot and AI: Agents

Agents

You can now use artificial intelligence to orchestrate and automate business processes through AI agents. The agents work autonomously to execute tasks, respond to various events and inputs, reason about the state of the data, and correct errors based on user interaction and the context of the Business Central experience.

In addition to the built-in agents available, you can also create your own custom agents using Microsoft Copilot Studio.

Sales Order Agent

Use the Sales Order Agent, which operates independently under your supervision, to drive efficiency and generate cost savings. The Sales Order Agent helps Business Central users automate the capture of sales orders.





The agent uses artificial intelligence to analyze customer requests received by email, locate the customer in Business Central, and engage in multi-exchange email conversations to clarify requests when important details are missing or when multiple options are available. It also verifies and informs the customer about the current and projected availability of the requested items and follows up with a quote or a sales order.

The document is generated in PDF format and includes the requested items, quantities, units of measure, prices, taxes, requested delivery dates, external document references provided, and other important details.

When you activate the agent, it is ready to autonomously execute the sales order capture process. An internal email processor in Business Central starts the agent. You configure the processor to monitor the company mailbox that the agent uses in its configuration.

You can review all the actions performed by the Sales Order Agent, including navigating through Business Central pages, creating and modifying records, and executing actions, from the Copilot panel.

Analytics, Business Intelligence, and Reporting

Support your processes with powerful insights that enable you to integrate data into your business strategy.

Empower every role within your organization with the information needed to make data-driven decisions. Use financial reports and KPIs with the executive team, create overview reports for middle management, and operational reports for staff. Group and analyze data dynamically from any list to perform ad hoc analysis directly in the application.

Export and analyze your data in Excel if it is your preferred tool. Each area of the application includes built-in analytics ready to use. Learn more about your options at aka.ms/BCAnalytics.

Analyze KPIs with Power BI

Use more than 110 built-in Power BI reports and over 400 KPIs to track any area of your business. Access the reports directly from the application, a browser, or your mobile phone. Set up personal or team dashboards and define the KPI thresholds and targets that are relevant to your organization.

Assign KPI owners, collaborate with your colleagues to meet goals, and receive alerts in Microsoft Teams when a KPI exceeds critical thresholds.

Configure Your Financial Reports

Use the self-service, no-code financial reporting functionality to gain insights into the financial data of your chart of accounts. Create your own financial reports to analyze general ledger (G/L) account figures and compare accounting movements with budget records.

Alternatively, use the built-in templates for your financial statements. View reports on-screen or export them to PDF or Excel. You can even design the layout in Excel and upload it back into Business Central.

Additionally, the financial reporting functionality allows you to use statistical account values and sustainability records to prepare common ESG reports.

Built-in Data Analysis

Analyze data directly from any list, without the need to run a report or open another application such as Excel. The Data Analysis feature offers an interactive and versatile way to group, pivot, filter, summarize, and examine information.

Instead of running reports, simply add multiple analysis tabs that represent different tasks or views of the data, such as My Customers or Sales Statistics. If you need data from related tables, just add them to your analysis. Share your analysis tabs with a colleague or export the data to Excel.

Analytics and Reporting by Business Area

Select the business area you prefer: finance, manufacturing, sales, project management, inventory, purchasing, subscription billing, and sustainability.





Analysis Assistant with Copilot

Gain insights faster with the help of your AI-powered assistant. Copilot makes it easy for any user to calculate, summarize, and analyze data in any record list, including information from related tables.

Simply describe your analysis scenario in your own words, and Copilot will set up a new analysis tab for you.

Prebuilt Reports for Most Scenarios

Business Central includes more than 400 built-in reports ready to use. You can obtain results in PDF or Excel format and integrate them with OneDrive for Business and/or Excel Online.

For reports with Excel layouts, you can even modify the format directly in Excel, upload it back into Business Central, and use that customized layout when running the report.

Finance

Accelerate financial close, improve forecasting, and obtain real-time performance metrics while ensuring compliance and security across all subsidiaries.

Business Central offers comprehensive financial management capabilities designed for small and medium-sized organizations. Optimize your financial processes and manage your finances end-to-end: monitor your budget, accelerate month-end and year-end closes, use unlimited dimensions, control fixed assets, and much more.

Maintain your company's financial health and make informed decisions with Business Central's robust financial tools.

General Ledger

Set up companies and use the Chart of Accounts as a comprehensive directory of financial accounts to record financial transactions in your organization's general ledger. Review or audit one or more general ledger entries according to the defined review policy.

Use functionalities for VAT and sales taxes, general journals, recurring journals, purchase and sales distributions, statistical entries, and background posting of journals. Posting and reporting can be performed in an additional reporting currency.

Business Central also supports exporting various audit formats (such as SAF-T, SIE, FEC, among others) as part of continuous transaction control. Compliance with specific standards facilitates audit controls and ensures user compliance while maintaining high performance during the export process.

Accounts Payable (AP) / Accounts Receivable (AR)

Manage your company's short-term financial obligations with Accounts Payable (AP) using functionalities such as invoice management, payment processing including vendor payment suggestions vendor management, approval workflows, and reporting.

Manage the revenues owed to your company with Accounts Receivable (AR) through invoice creation, payment tracking, customer management, collections management, and reporting.

These processes optimize financial operations and improve visibility into your company's financial health. Manage your accounts receivable effectively with the Late Payment Prediction extension and adjust payment terms or methods as needed.

VAT and Tax Management

If your country or region requires calculating and reporting value-added tax (VAT) on sales and purchase transactions, you can configure Business Central to perform VAT calculations.

In countries where VAT is not used, Business Central supports sales taxes or GST. For example, with sales tax you can manage tax areas and tax jurisdictions, as well as Use Tax (U.S.) and Purchase Tax (Canada). Many local tax specifics are covered through the various country-specific localizations.

Excise Tax Calculation

Excise taxes apply to specific goods and services. This functionality automates the complex process of calculating excise tax amounts. It calculates excise taxes and complies with specific tax regulations for different products and regions, reducing the risk of errors.

The functionality provides a calculation framework that supports different models for determining final tax amounts and can be adapted to various requirements, not just excise taxes.

Dimensions

Use unlimited dimensions in transactions across all ledgers for key aspects of your business, such as departments, projects, sales channels, and geographic areas. Set up rules for how dimensions and dimension values can be combined.





Control dimension usage and increase the reliability of dimension-based results. Assign default dimension values to master data such as G/L accounts, customers, vendors, fixed assets, resources, and items. Define rules to prioritize the use of these default values.

Use dimension data in reports for filtering, in Financial Reports to analyze the general ledger, and in the data sent to Power BI.

Deferrals

Set up deferral templates that automate the process of deferring revenue and expenses according to a schedule. Recognize revenue and expenses in periods different from the period in which the transaction is posted.

Budgets

Track business progress using budgets in the general ledger. Use budgets in financial reports, in user-defined analyses within account statements, or in data sent to Power BI for analysis and sharing.

Import budget information to and from Microsoft Excel to leverage advanced calculation capabilities during the budgeting process.

Cost Accounting

Gain a clear view of costs through visibility into actual and budgeted costs across operations, departments, products, and projects. Combine core general ledger transaction data with dimensions and known future costs, and define a hierarchy of cost centers and cost objects.

Allocate costs using allocation processes with different keys and distribution methods. Analyze actual and budget data from the general ledger in user-defined scenarios. Explore these scenarios to gain business insights that are not immediately reflected in the chart of accounts.

Allocation Accounts

You can use allocation accounts to distribute amounts in sales and purchase documents, as well as in general journal lines, across different general ledger accounts. Amounts can be allocated using fixed or variable distributions.

Multiple Currencies

Conduct transactions with customers and vendors in multiple currencies. Use multiple currencies in sales and purchase documents, bank transactions, general ledger entries, and accounts payable and accounts receivable payments.

Store currency details for accounts receivable transactions, while accounts payable are recorded in both local and foreign currencies. Adjust local and foreign currency values for unrealized gains and losses to maintain accurate accounts receivable and accounts payable aging reports.

Use the purchase draft functionality to review and adjust incoming electronic invoices especially those without item references or general ledger mappings before finalizing them, ensuring accurate posting and accounting records. This functionality can be used for documents created from PDF files or Peppol electronic invoices.

Finance: Electronic Documents

Electronic Documents (Electronic Invoicing)

Electronic documents (e-documents) are the foundation of modern business transactions. They include key documents such as invoices and vouchers, both for issuance and receipt. They also incorporate messaging capabilities related to document status between access points. Multiple localizations are available.

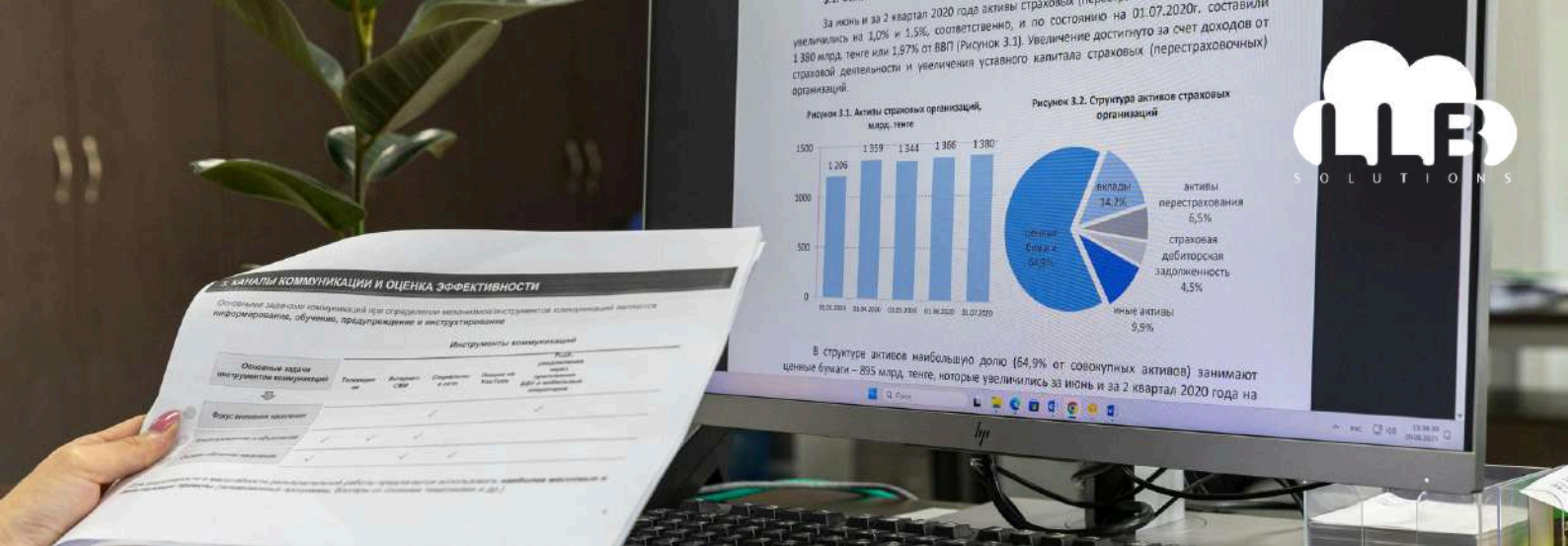
Specify the preferred document delivery method at the time of posting. Send electronic documents through a service and via email simultaneously. Configure Business Central to create electronic documents through a fully automated one-step process, or through a two-step process that requires approval.

You also have the option to automatically embed a human-readable PDF file within the XML file, which can be automatically extracted during the purchasing process. Additionally, XML data can be embedded in documents formatted as PDF/A.

Use electronic documents in sales and purchase documents, such as sales orders, purchase orders, and invoices.

Preview the details of incoming electronic documents, such as invoices and credit notes, before processing them.





Using the Electronic Documents App

Manage electronic documents more efficiently with the E-Document Core app and use one of the many available built-in connectors.

Use the electronic documents app in countries or regions where businesses require specialized electronic invoicing handling to comply with local regulations, and also as a framework for EDI. Microsoft uses Peppol BIS3 as the default format, but also supports local file formats across all Microsoft localizations.

Electronic Shipments (E-Shipment) and Electronic Transfer Shipments (E-Transfer Shipments)

Beyond invoices and credit notes, the electronic documents framework also supports the transmission of other document types, such as electronic shipments and electronic transfer shipments of goods, improving regulatory compliance in countries where these formats are mandatory.

Integration of the Electronic Documents App

The Electronic Documents app exposes almost all of its functionality through APIs, enabling users to share electronic documents—both sales and purchase documents—with other applications and services. For example, it allows integration with Power Automate, providing a flexible, no-code, and compliant way to share documents with the right people outside standard processes. To share electronic documents with other applications, Power Automate APIs are used.

By integrating the Business Central Electronic Documents app with Power Automate, you can connect with Power Platform tools and other systems to extend functionality. This setup allows electronic documents to be sent as BLOB files through various communication channels, beyond the default connectors or email.

The integration also enables automated receipt of electronic documents within the purchasing process, transferring them to the electronic documents tables for further processing in Business Central.



This functionality also enables the use of electronic document capabilities in Copilot Studio, where users can easily create custom agents to support Accounts Payable (AP) and Accounts Receivable (AR) processes.

Electronic Document Mapping with Copilot

Improve the mapping and matching of vendor invoices with purchase orders with the help of Copilot. Reduce the time spent on tasks that typically require extensive searching, inquiries, and manual data entry.

When vendor invoices do not exactly match purchase orders, Copilot can intelligently identify the relevant purchase orders. In addition, it allows you to update an existing purchase order in Business Central with the information received in the electronic invoice and even create missing lines in the purchase order.

Supported Electronic Document Exchange Models

The electronic documents framework supports virtually all document exchange models. Users can easily configure 2-corner, 3-corner, 4-corner, or 5-corner models.

In these models, documents can be transferred directly to recipients for example, via email or through built-in connectors designed for seamless document exchange.

The electronic documents framework also supports the clearance model, which ensures that the tax authority or an authorized certifier pre-approves each invoice before it is shared with the customer. In several countries, this model is essential for meeting regulatory requirements.

Finance: Multi-Entity Capabilities

Consolidation

Consolidate companies across different environments or within the same Business Central tenant and pull data directly into the consolidation company. You can also use XML files to import data from other databases or third-party ERP applications. Use multiple currencies, dimensions, and budgets for consolidation processes.

Intercompany Postings

Manage the accounting for more than one company within a single posting process, which can include one or multiple Business Central environments or tenants.



Send sales and purchase documents to partner companies and post journal transactions using mappings to shared charts of accounts and dimensions. Control the document flow through the Inbox/Outbox functionality, which automates sending and receiving. Use sales and purchase documents in multiple currencies to reconcile intercompany balances.

Master Data Management

Synchronize data when two or more companies use the same master data for example, when setting up new subsidiary companies. Reduce manual data entry for each company.

Master data includes configuration and non-transactional information about business entities such as customers, vendors, items, and employees. This data provides the context for business transactions.

Use one-way synchronization to pull data from the source company to subsidiary companies within the same Business Central environment. Job Queue entries update the linked records in the subsidiaries when changes are made to the data in the source company.

Company Hub

For users who work with multiple companies in Business Central, the Company Hub acts as a home page that provides a consolidated financial view across companies and environments. It offers tools to manage work across different environments, companies, and regions, and also allows users to see a summary of assigned tasks for each company.

Finance: Fixed Assets

Fixed Assets

Track fixed assets such as buildings, machinery, and equipment. Record fixed asset transactions including acquisitions, depreciation, extraordinary depreciation, revaluations, and disposals. Assign one or more depreciation books to define different methods (up to 8) and conditions for depreciation calculation. Easily create identical fixed assets in bulk.

Use depreciation books to meet management, internal accounting, and statutory reporting requirements. Record maintenance costs, insurance coverage, and cost allocations for assets.

Fixed Asset Allocation

Use allocation keys to assign percentages of fixed asset transactions such as acquisition cost and depreciation to departments or projects.

Fixed Asset Insurance

Set up insurance policies to cover one or more fixed assets. Assign a fixed asset to an insurance policy or assign multiple fixed assets to the same policy. Use dedicated reports and statistics pages to analyze insurance policies and determine whether fixed assets are overinsured or underinsured.

Fixed Asset Maintenance

Record maintenance and service expenses for fixed assets. Obtain detailed insights to analyze and make decisions regarding asset renewal or disposal.

Fixed Asset Revaluation

Fixed asset revaluation can include value increases, extraordinary depreciation, or general value adjustments. When the value of a fixed asset increases, post a journal line with a revaluation in the depreciation book. The new amount is recorded as a revaluation according to the fixed asset's accounting setup.

When the value of a fixed asset decreases, post a journal line with a lower amount an extraordinary depreciation in the depreciation book. The new amount is recorded as extraordinary depreciation based on the fixed asset's accounting setup. Indexation is used to adjust multiple fixed asset values, for example, due to general price changes.

Split or Combine Fixed Assets

You can split a fixed asset into multiple fixed assets for example, when you need to distribute an asset across several departments. You can also combine multiple fixed assets into a single fixed asset, for example, when moving distributed fixed assets into one department.



Finance: Cash Management

Bank Account Management

Create, operate, and manage multiple bank accounts for different business needs and in multiple currencies.

Cash Flow Forecast

Anticipate how your company's liquidity will evolve over time. Create basic cash flow forecasts that can be expanded and adjusted as needed. Use a setup wizard to complete tasks and take advantage of automatic daily or weekly data updates.

Include accounts payable, accounts receivable, open sales, purchase orders, sales orders, project orders, and service orders as sources for the cash flow forecast. Use Azure Machine Learning capabilities to generate cash flow predictions based on Business Central data.

Forecast expected cash inflows and outflows, as well as available liquid funds. Anticipate fixed asset insurance premiums and easily determine whether assets are overinsured or underinsured. Associate assets with one or more insurance policies and index the insured amounts.

Electronic Payments and Direct Debits

Create payment proposals based on vendor documents and generate bank payment files in ISO 20022/SEPA format. You can also use third-party banking service apps to generate electronic payment files in the format required by your bank. Create direct debit collections for bank files in ISO 20022/SEPA format.

Bank Account Connectivity

Connect directly to your bank accounts using the available Bank Feeds app (US and Canada only) or a third-party app for global banking connectivity.





Simple Payment Process for Your Customers

Offer your customers an efficient payment process by adding links to online payment services on Business Central invoices (online version only). Use the PayPal extension to access a trusted global payment service that offers multiple ways to accept payments, including credit cards and PayPal accounts.

Bank Statement Reconciliation for Incoming and Outgoing Transactions

Import bank transaction data from electronic files sent by your bank in ISO 20022/SEPA format or other file types. Automatically apply transactions to open customer and vendor entries and create your own reconciliation rules. Review proposed applications and accounting matches. Adjust the reconciliation algorithm by modifying, removing, or adding rules.

Reconciling bank payments from the Payment Reconciliation Journal is done in a single step and from one central location. Filter bank statement information to view only the transactions that require attention. Summarize outstanding banking information and drill down into the details of each bank transaction.

Sending Reminders for Outstanding Balances

Use reminders to notify customers about overdue amounts. You can also use reminders to calculate finance charges, such as interest or fees, and include them in the notice. Configure reminder terms and assign them to customers. Choose automation options to reduce the time spent on collections and automate the creation, issuance, and sending of reminders to your customers.

Bank Account Reconciliation

Bank reconciliation should be performed regularly for all bank accounts to ensure that the company's cash records are accurate. Import bank statement data from electronic files sent by your bank in ISO 20022/SEPA format, other file types, or through direct bank connectivity. Automatically reconcile statement data with open bank ledger entries and maintain full control over all bank statements.

Bank Reconciliation with Copilot

Use Copilot as an assistant in the bank reconciliation process. This functionality offers two main tasks:

- Improve the automatic matching of transactions with accounting entries. Copilot uses artificial intelligence to analyze unreconciled transactions and identify more matches based on dates, amounts, and descriptions.
- Suggest general ledger (G/L) accounts. For residual bank transactions that cannot be matched with existing entries, Copilot compares the transaction description with account names and suggests the most appropriate general ledger account for posting.

Check Issuance

Print checks as automated electronic checks or write them manually, with flexible options for voiding, reprinting, using preprinted stub forms, and test printing before final output. Consolidate multiple payments to a vendor into a single check.

Finance: Subscription Billing

Subscription Billing

Invoice contractually agreed services on a recurring basis using subscription billing. Integrated and flexible billing models support multiple subscription scenarios, including pricing models, price management, renewals, billing periods, and billing frequencies.

Manage recurring service invoices to minimize errors, store all information in one place, and maintain a clear view of contract management. Reduce manual effort by simplifying and automating processes. Use the Power BI app to analyze subscription billing data and gain comprehensive, detailed insights into your business.

Contracts

Use contracts to group contractual commitments and bill them together on a recurring basis. In subscription billing, a contract is the technical equivalent of one or more real-world contracts that are billed to a customer.





Recurring Billing

Create a billing proposal from which accounting documents such as invoices and credit notes are generated. Select a billing template with a unique code and description, along with filtering criteria and default values for date calculations. Define the filtering criteria that determine which service commitments will be billed and generate the corresponding accounting documents.

It supports the basic process of collecting emissions data through sustainability journals or purchase documents, as well as recalculating emissions into CO₂ equivalents. You can enter known data manually or use the built-in methods for calculating the emissions footprint.

Learn more about sustainability management in Business Central at: aka.ms/BCESG.

Usage-Based Billing

Usage-based billing extends the functionality of recurring billing within subscription billing. Easily import usage data from various providers into Business Central, where the system processes the information and calculates pricing. Perform accurate daily billing even when there are changes in quantities or partial periods.

Sustainability Chart of Accounts

Use the sustainability chart of accounts as a structured foundational list for recording all emissions data. It serves as a framework that categorizes and organizes sustainability accounts based on their attributes, such as scope or other groupings.

Sustainability Management

Monitor and manage your organization's environmental impact.

This functionality is designed to control and regulate an organization's environmental footprint by tracking various greenhouse gas (GHG) emissions, enabling accurate and relevant insights.

View reports that display sustainability ledger entries and balances. Open the sustainability account card to add or modify settings. Configure the category and subcategory for each account.

Set up a category to determine which gas should be monitored, along with the formulas for calculating its emissions. Additionally, you can use a subcategory as the source for the emission factors used in those formulas.

View balances separated by each emission type for a single account, as well as balances by account groups or emission scopes. Add one or more dimensions to each account and define dimension filters.

Recording Sustainability Entries with Sustainability Journals

Manually record greenhouse gas (GHG) emissions in the sustainability ledger using standard or recurring sustainability journals.

Sustainability journals are designed to track and record sustainability-related activities, using the same user experience as other journals in Business Central.

You can manually enter emissions in a journal or alternatively use built-in formulas to accurately calculate emissions based on specific known parameters or general ledger (GL) balances, along with emission factors corresponding to different types of sources and accounts.

Suggest Greenhouse Gas Emissions in Sustainability Journals with Copilot

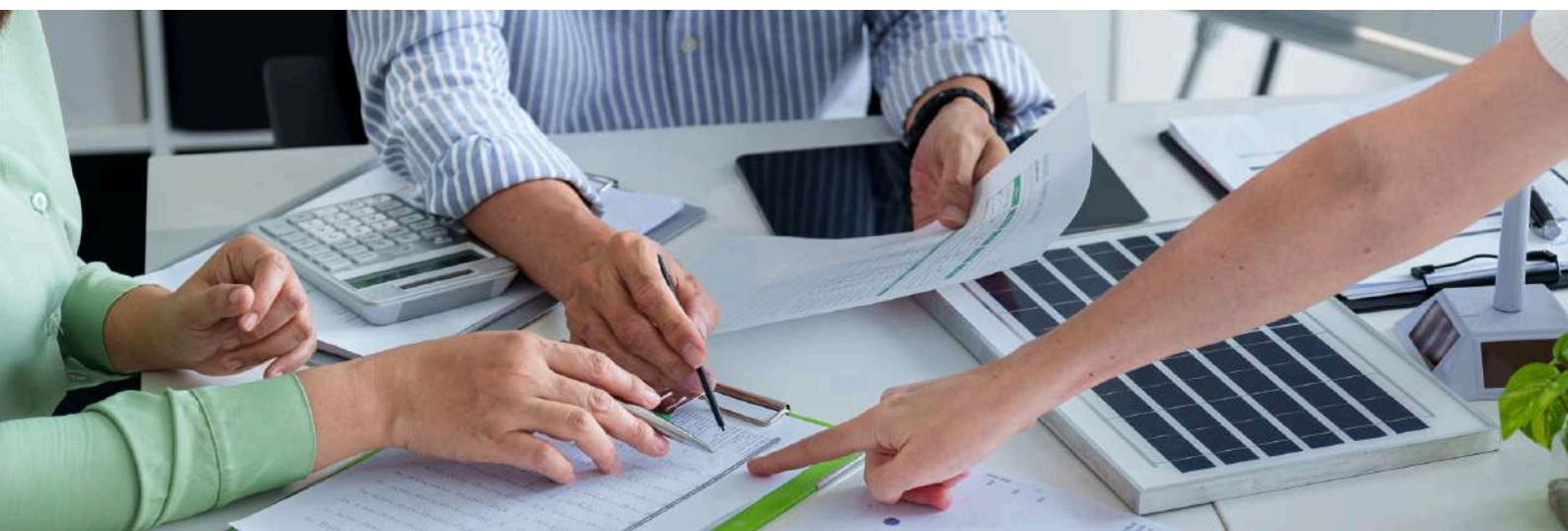
Improve accuracy and productivity in emissions data collection and emission factor calculation with Copilot.

For greenhouse gas (GHG) emissions, Copilot can estimate total emissions based on entered descriptions and parameters, and adjust emission factors for future use.

For each estimate, Copilot provides the formula used for that specific calculation and the values applied. Copilot can use publicly available external information as well as emission factor files uploaded into Business Central. For some carbon footprint calculations, it can even use a combination of public and local information.

Water and Waste Management

Track your company's environmental impact in Business Central through water and waste monitoring, and prepare for compliance with regulatory reporting especially in relation to the Corporate Sustainability Reporting Directive (CSRD).





Use the Sustainability Journals and Recurring Sustainability Journals pages to record water and waste intensity data. Track these values using the Water/Waste Intensity Type and the Water Type.

Purchase Documents

Use invoices and purchase orders to record and track greenhouse gas (GHG) emissions in any purchase-related document, saving time, avoiding duplicate information, and providing a better connection between financial and ESG data.

Sustainability Dashboards and Targets

Manage sustainability metrics and track their performance against key business objectives.

Create targets based on current values and future goals, and monitor progress by comparing current emissions with previous periods as a baseline.

Create sustainability dashboards and assign targets for the entire company, or for a specific country, region, or facility.

Carbon Equivalent (CO₂e)

Carbon equivalent is a measure that expresses the impact of different greenhouse gases in terms of the amount of CO₂ that would have the same global warming potential.

Easily set up carbon equivalent factors for each gas you want to track in Business Central, providing additional information in the sustainability ledger.

You can also choose to enter all data directly as carbon equivalents for each gas. This functionality simplifies data capture, reduces errors, and makes emissions tracking more efficient.

Carbon Credit Management

Carbon credits are permits that allow their owner to emit a specific amount of carbon dioxide (CO₂) or other greenhouse gases (GHG).

Set up items as carbon credits and acquire them as evidence of your carbon offsetting in the sustainability ledger. Use purchase invoices or sustainability journals to record these credits.

Sustainability Certificates

Use sustainability certificates as a tool to validate your efforts to reduce environmental impact and respond to growing consumer demand for responsible practices.

Create a sustainability certificate standard that provides third-party verified, transparent, and measurable criteria aligned with international ESG frameworks to promote responsible business practices. Add sustainability certificates for suppliers and items.

Tracking High-Emission Items

Efficiently track and manage items with high emissions. This control helps comply with environmental regulations and supports your sustainability efforts.

Monitor inbound and outbound transactions and their pollution impact, and make informed decisions to reduce your carbon footprint.

Energy Consumption Tracking

This functionality improves compliance, transparency, and operational efficiency in sustainability.

It allows tracking energy consumed by specific energy sources using Sustainability Journals and Purchase Invoices.

You can collect energy source and consumption data in sustainability ledger records, enabling comprehensive reporting and compliance with CSRD and other ESG standards.

Carbon Fee Calculation

An internal carbon fee is a monetary charge that a company applies to itself for each ton of carbon emissions it produces. This fee is used to fund the company's emission reduction efforts and to drive internal decision-making toward more sustainable practices.

Set up and record your internal carbon fee as needed. You can establish different carbon fees by country, facility, period, or scope.



Supply Chain Management

Deliver products on time and adapt to changing business models with full visibility across purchasing, manufacturing, inventory, and warehouses.

Business Central's supply chain management capabilities are designed to optimize your operations. Simplify sourcing processes, manage inventory efficiently, and improve collaboration with suppliers.

With accurate demand forecasting and real-time visibility, you can ensure timely deliveries and maintain optimal inventory levels. Automate and control workflows with warehouse management tools, and improve logistics and transportation management. Leverage AI-driven insights to make informed decisions, reduce costs, and improve overall supply chain performance.

Supply Chain Management: Purchasing

Vendor Management

Start by creating a vendor using predefined templates, capturing essential information such as contact details and payment terms.

Enable the approval workflow to ensure compliance.

Add a list of items sold by the vendor, including lead times, prices, and applicable discounts to improve operational efficiency.

Purchase Order Management

A purchase order is a key element in the purchasing process, as it allows you to issue and track prepayments, monitor expected receipt dates, and process partial or full receipts and invoicing.

For more advanced scenarios, use quotes and blanket orders as an additional step in the purchasing process.

Use warehouse receipts or inventory put-aways to delegate receiving tasks to the warehouse team.





Alternate Order Addresses

Set up multiple addresses to manage vendor orders for suppliers that have more than one shipping site.

These additional locations can be selected by the purchasing agent when creating a purchase order or invoice, providing greater operational flexibility.

Purchase Invoice Discounts

Automatically calculate discounts on invoices. The discount may vary by vendor, with different minimum amounts (even in different currencies) and different rates depending on the invoice amount.

The discount is calculated for each item line and becomes part of the net invoice amount.

Purchase Line Discounts

Manage multiple negotiated discounts per item in purchasing, based on parameters such as minimum quantity, unit of measure, currency, item variant, and validity period.

The best unit cost based on the highest available discount is automatically calculated for the purchase line when the order details meet the conditions defined in the purchase line discounts table.

Alternative Vendors

Manage purchasing the same item from different vendors.

Set up alternative vendors for items, define typical lead times, and record pricing agreements and discounts with each vendor.

Purchase Return Order Management

Create a purchase return order to compensate your company for incorrect or damaged items. Items can be selected directly from the return order.

You can configure partial return shipments or combine multiple returns into a single credit memo, as well as link return orders to replacement purchase orders.

Purchase Invoicing

The purchase invoice is designed for scenarios where you need to record the receipt of goods or capture expenses efficiently.

It is a powerful tool for processing a single invoice that consolidates multiple purchase orders and shipments from a vendor.

Supply Chain Management: Product Information Management

Item Catalog

Items represent the goods or services you sell and can also include non-inventory items.

Use item templates to reuse configurations across different types of items when creating new records.

Add images to your items. Group items into a hierarchy and define custom categories that include specific attributes.

Item Attributes

Add custom data such as color, country of manufacture, size, or product dimensions to applicable items to complement the built-in global fields.

Define attribute option types, such as lists and text, as well as integer and decimal values that can include units of measure.

Translate attribute names and their options into multiple languages.

Lock attributes or attribute options when they are no longer applicable.

Item Variants

Item variants are an excellent way to keep your item list under control, especially when you have a large number of nearly identical items for example, when they only differ in color.

Instead of setting up each variant as a separate item, you can create a single item and define the different colors as variants.





Variants are available across all areas of Business Central, including manufacturing and planning, enabling scenarios in industries where, for example, inventory is managed by revision.

Units of Measure

You can set up general units of measure. The unit of measure defines how the item is stored in inventory and serves as the basis for conversion to alternative units, such as pallets, boxes, or cans.

Item References

Identify items in an order using item numbers that differ from the item's own number.

Easily store and access cross-reference information from customers, vendors, and manufacturers, as well as generic numbers, Universal Product Codes (UPC), and European Article Numbers (EAN).

Item Substitutions

Link items that have equal or similar characteristics to suggest alternatives when an item is out of stock in orders.

Provide better customer service by offering lower-cost alternatives or upselling to increase revenue.

Suggest Item Substitutions with Copilot

Save time by allowing Copilot to suggest item substitutions based on the description of the current item.

Reuse information from similar items that Copilot finds for you and reduce the risk of creating duplicate records in the item list.

Vendor Catalog

Offer your customers items that are not part of the regular inventory but can be ordered from vendors or manufacturers on an ad-hoc basis.

Record these items as non-inventory items, but treat them like regular items within system processes.

Marketing Text Suggestions with Copilot

Bring your products to market faster with AI-generated item descriptions based on the attributes you've already defined in Business Central.

Copilot adds a creative touch and suggests engaging marketing copy aligned with your brand, so you're ready to sell in your online store.

Supply Chain Management: Inventory Control

Inventory Management

Set up inventory items and specify properties such as unit of measure, costing method, inventory posting group, unit cost, and price.

Record item transactions such as sales, purchases, and positive or negative adjustments using item journals.

Store quantity and cost records of posted transactions in the inventory ledger and use them as the basis for valuation and other cost calculations.

Set up non-inventory items and services in the same way as inventory items, and use them in sales, purchase, or consumption transactions without needing to track stock levels or costs.

Inventory Costing

Set up how an item's unit cost is calculated by defining assumptions about the physical flow of items within the company.

Choose a costing method that determines whether an actual or budgeted value is capitalized and how it is used in cost calculation.

Business Central offers five costing methods: FIFO, LIFO, average, specific, and standard.

Reconcile inventory costs with the general ledger when posting inventory transactions using the posting setups.

Post expected costs in both inventory and the general ledger. When a quantity is received or shipped but not yet invoiced, a value entry is created with the expected cost.

Revalue inventory based on the valuation basis that best reflects its actual value, using the revaluation journal to update inventory valuation.

Item Tracking

Manage and track serial numbers, lots, and/or packages.

You can add multiple serial numbers, lot numbers, or package IDs to a single document or journal line.

Associate expiration dates and warranties with a specific lot or serial number. Prevent the shipment or use of expired inventory. Track the origin or destination of a specific serial number or lot to execute recall campaigns.





Multiple Locations

Manage inventory across multiple locations, such as production plants, distribution centers, warehouses, showrooms, retail outlets, and service vehicles.

Inventory at each location can have specific financial dimensions or posting rules.

Make inventory information accessible to CFOs and financial leaders through financial reports.

Stock Keeping Units (SKUs)

Manage SKUs. Identical items with the same item number can be stored in different locations and managed independently at each one.

Set up costs, replenishment, manufacturing information, and more based on location.

Transfers Between Locations

Track inventory as it moves from one location to another.

Post the value of inventory in transit and in the different locations.

Shipping Agents

Set up multiple shipping agents (external carriers or your own transportation) and link their services (express, overnight, standard) to shipping lead times.

Associate default shipping agents and services to specific customers, or define these details directly in sales orders and transfer orders to improve accuracy in delivery promises.

Item Charges

Manage item charges, including additional costs such as freight or insurance, by incorporating them into the unit cost or unit price of an item.

Assign charges to orders, invoices, and credit memos, for both sales and purchases.

Charges can be applied directly to the item purchase invoice or recorded in a separate purchase invoice.

Use the item charges functionality to include additional costs such as freight or insurance in the unit cost or unit price.

Add charges to sales and purchase orders, invoices, and credit memos.

The cost can be assigned directly to the items in the same document or to documents that have already been received or shipped, such as purchase receipts, transfer shipments, or sales shipments.

Distribute costs manually or automatically, based on the amount, weight, or volume of the items.

Item Budgets

Define sales and purchase budgets at the customer, vendor, and item level.

Prepare and record a sales budget that serves as input for decision-making in operational areas such as purchasing and logistics.

Gain insights into expected demand and use them in commercial discussions with customers. Finalize budgets and track actual sales performance, calculating variances.

Export budget figures to Excel for flexible calculations during the budgeting process.

Standard Cost Worksheet

Provides finance leaders with a reliable and efficient way to maintain accurate inventory costs. Work with standard cost updates in Business Central just like you would in an Excel spreadsheet.

Prepare cost updates without changing the data until you are ready to apply them.

Analysis Reports

Provides decision-makers with detailed insights to support daily decisions related to sales, purchasing, and product portfolio management.

Based on item transactions, create customizable analyses that allow you to add and combine analysis dimensions such as customers, items, and vendors according to your needs.





Cycle Counting

To ensure quantities are accurate, perform a physical inventory count.

Use journals to post the actual quantities to the ledger, for example, when valuing inventory at the end of a period.

To adjust quantities after a physical count or for other purposes, use an item journal to modify inventory ledger entries without recording new transactions.

Physical inventory orders are useful for high-volume counts because they allow you to distribute work, analyze variances, and request recounts when unexpected discrepancies occur. To count certain items more frequently such as high-value items use cycle counting by assigning specific counting intervals to those items.

Manage cycle counting to verify inventory data and maintain or improve accuracy. You can configure cycle counting at the item or SKU level.

Supply Chain Management: Planning and Availability

Multilevel Automatic Supply Planning

Plan material requirements based on demand, with support for Master Production Scheduling (MPS) and Material Requirements Planning (MRP). Generate optimal replenishment suggestions such as assembly orders, purchase orders, production orders, and transfer orders based on demand and the current and future availability of the item, as well as various planning parameters such as minimum and maximum quantities and reorder quantities. Use time buckets for material requirements planning.

Demand Forecasting

Define demand forecasts by items, variants, and locations.

Enter demand (sales) forecasts for products and components in a more convenient way (daily, monthly, or quarterly).

Create production and purchase orders that consider demand forecasts, available inventory, and planning requirements.

Sales and Inventory Forecasting

Gain detailed insights into potential sales and a clear view of possible stockouts using the Sales and Inventory Forecasting extension.

Leverage its built-in Azure AI capabilities to generate reliable forecasts that simplify replenishment management.

Order Promising

Provide accurate delivery dates to your customers using the order promising functionality.

If the current inventory level is not sufficient to fulfill a customer request, use planned receipts to check whether availability will be possible in the near future (Available to Promise – ATP).

If items are not available, the functionality indicates how long it will take to replenish inventory, considering lead times for production and purchasing, not only for the requested item but also for critical components (Capable to Promise – CTP).





Replenishment for Individual Demands

For simpler planning scenarios, plan each demand individually to gain greater control and flexibility.

Analyze availability and create purchase orders directly from a sales order or a project.

Alternatively, use the order planning page to get an overview of all demands or specific demand types, such as sales or production consumption.

Reservations

Reserve both available inventory and incoming supplies to ensure critical products are allocated where they are needed most.

The Reservations Worksheet helps allocate available inventory across different demands, such as sales orders or production components. This worksheet uses different allocation policies to optimize inventory distribution.

Calendars

Set up calendars with working and non-working days.

Assign a base calendar to customers, vendors, locations, companies, shipping agent services, and service management setup, and make adjustments when needed.

Use calendar entries in date calculations for sales orders, purchase orders, transfers, production, and service orders, as well as in requisition and planning worksheets.

Supply Chain Management: Warehouse Management

Warehouse management levels

Configure warehouse processes according to the requirements of each location. Decide whether you want to use flexible locations (bins) or simple shelves defined in the item card, and whether the warehouse team should work with separate documents or update sales and purchase orders directly.

Define whether picking and shipping are performed in separate steps or can be executed in a single step.

Manage both inbound flows, such as purchases and sales returns, and outbound flows, such as sales and outbound transfers. Also manage internal flows, such as consumption for projects or production. These flows can be configured independently.

Locations (Bins)

Organize your warehouse by assigning items to bins, the smallest unit within the warehouse's logical structure.

Configure and maintain bins by defining the warehouse layout and the dimensions of racks, columns, and shelves. Group bins into zones to manage how warehouse workflow activities are directed.

Define bins using capacity values such as quantity, total volume, and weight to control which items and in what quantities can be stored in each bin. Restrict the use of bins to specific items by using warehouse class codes. In basic setups, assign bins directly on document lines or journals. Default or fixed bins speed up document processing.

For a more advanced flow, you can automate and optimize how items are put away and picked using location worksheet and pick worksheet, ranking bins so the system suggests where to pick from or where to place items based on priority criteria. This enables optimal use of warehouse space and improves operational efficiency.

Bin Replenishment

Optimize warehouse storage by moving items between bins. For example, when products need to be moved periodically from bulk storage areas to picking bins, especially when items are purchased in large quantities. Use Calculate Bin Replenishment to get suggestions on where to move the items.

Warehouse Volume Management

Optimize warehouse operations by automating workflows and generating warehouse documents automatically based on events. Use recurring tasks through the Job Queue, or maintain control by creating put-aways and picks in bulk from the corresponding worksheets.

Picking and Inventory Put-Away

Create picking lists from sales orders and put-away tasks from purchase orders to assign activities to the warehouse team, who can complete these tasks without having to open the sales or purchase orders.





Inventory Pick and Warehouse Put-Away Documents. Inventory Pick and Warehouse Put-Away documents are designed so warehouse staff can focus on the physical handling of products. They include key information such as item and quantity, preassigned bins and shelves, and lot or serial numbers.

Advanced Capabilities

Use flexible put-away templates to ensure products are stored in the correct bins. Save time by using cross-docking. Manage different units of measure for the same items, and use First Expired, First Out (FEFO) picking for lot-controlled products.

Warehouse Receiving and Shipping

In environments with multiple orders, Warehouse Receiving and Warehouse Shipping documents allow you to process several documents in a single step. These documents can be used independently or together with warehouse picking and put-away documents.

Warehouse Picking and Put-away

For more complex warehouse scenarios, where picking and shipping tasks are performed by different roles, you can use separate Warehouse Picking documents.

Create warehouse pickings directly from warehouse shipments, internal picks, or using picking worksheets. You can also create them in bulk and optimize the process by grouping tasks by items, bins, and destinations, allowing you to efficiently prepare items from multiple orders.

Similarly, Warehouse Put-aways allow you to place products in their storage locations once receiving is completed. Put-away tasks can be created directly from warehouse receipts or internal put-aways, or you can use the put-away worksheet to generate multiple location tasks.

Supply Chain Management: Manufacturing

Assembly Management

Define a list of sellable items, raw materials, subassemblies, and resources as an Assembly Bill of Materials (Assembly BOM) that make up a finished product or kit.

Use assembly orders to replenish assembled items. Capture customer requirements for the kit bill of materials directly from sales quotes, blanket orders, sales orders, and project lines, within assembly-to-order processes.

Product Bill of Materials (BOM)

Create a bill of materials (BOM) to manage the materials, subassemblies, or ingredients required for a specific product or a group of products.

Use formulas based on dimensions and scrap percentages for more accurate calculations of required quantities. Employ phantom BOMs to simplify management and group components.

Attach manufacturing-related documents, such as blueprints or technical drawings, directly to the production BOM.

Capacity Planning

Add capacities (work centers) to the manufacturing process. Configure production routes for manufacturing orders and material requirements planning (MRP).

Visualize workloads and task lists by capacity. Include machine centers as capacities within the production process.

Manage the capacity of each machine or production resource in detail through machine centers, and at a consolidated level through work centers.

Use machine centers to store default information about manufacturing processes, such as setup times, waiting and transfer times, as well as default scrap percentages.

Manage finite resource loading with capacity constraints and consider capacity limitations by period to prevent work center overload.





Version Management

Create versions of production bills of materials (BOMs) and routes. Versions are selected automatically based on dates. Take advantage of item information with storage units (SKUs) by assigning them production BOMs and routes.

This functionality is especially useful when different variants of an item require different components for example, a green version of a product that requires green paint. It is also beneficial when work is performed in different locations, where equipment with different characteristics is available.

Production Orders

Create production orders manually or generate them using planning capabilities such as demand planning, planning from sales orders, or the planning worksheet.

The status of the production order controls how it behaves within the application and defines the form and content of the production process. Simulated, planned, firm planned, released, and finished production orders can be used.

For example, simulated production orders are used for quotes and cost calculations, while firm planned production orders can be created automatically from sales orders and serve as input for capacity requirements planning.

Production orders can be created for:

- A specific product.
- Products manufactured for a selected sales order.
- A product group or family, when different products are manufactured using the same routing.

Orders can also include make-to-order subassemblies. Adjust the created orders as needed: replace components, increase or decrease operation durations, or reassign work to different work centers or machine centers. Record actual or expected consumption of raw materials and the completion of operations manually or automatically, as well as setup and run times.

Manufacturing Costing

With detailed cost breakdowns including materials, capacity, subcontracting, manufacturing overhead, and non-inventory costs manufacturers gain accurate, actionable data for every item produced.

You can choose whether to use actual costs or standard costs. Both provide a comprehensive view of production costs and greater clarity on their composition. Standard cost can be accurately derived from the item or, if available, from stock keeping units (SKUs), reflecting specific variants and locations within the manufacturing process.

Automatic Consumption of Components and Capacity

Reduce manual data entry and obtain accurate inventory and work-in-process (WIP) insights at the same time. Use routing codes to link components to specific operations and minimize waste by applying just-in-time (JIT) principles.

Scrap

Scrap can be unavoidable in manufacturing processes; however, recording it correctly is essential for proper inventory and cost management.

You can record actual scrap for each production operation and also include expected scrap for both finished products and raw materials within material planning and cost calculation.

Sales

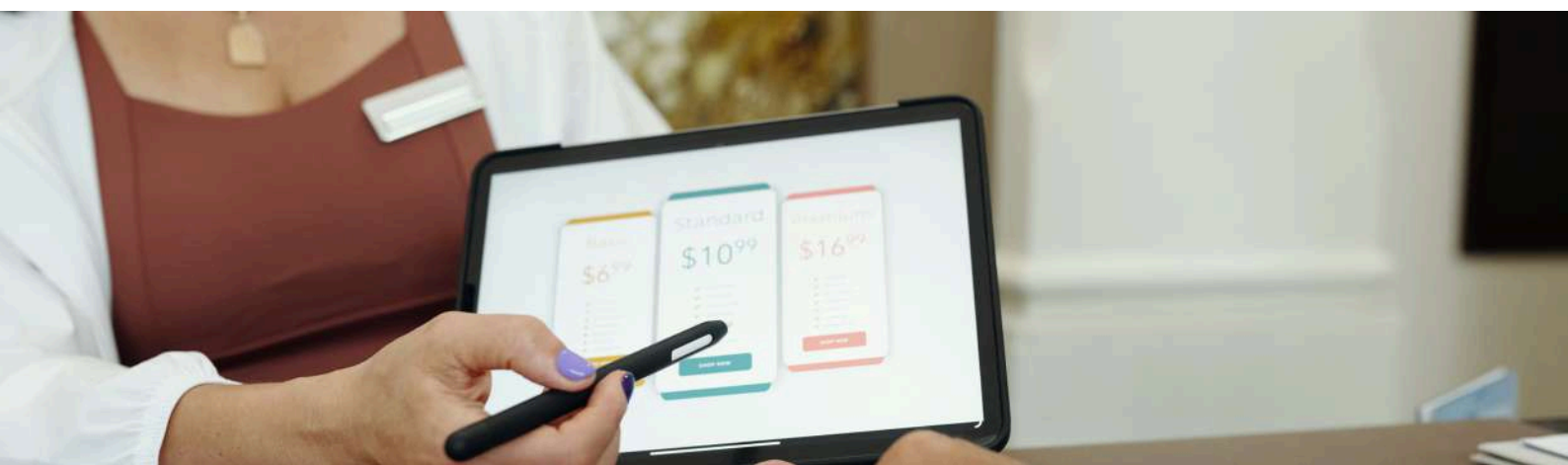
Efficiently manage quotes, blanket orders, and sales order processes.

Business Central offers flexible pricing and discount structures. With Copilot, you can easily create sales lines in documents such as quotes, orders, blanket orders, and invoices using both structured inputs and natural language. Find products by description or reference, link prices and discounts to sales campaigns, automatically calculate invoice discounts, and manage multiple shipping addresses.

Customer Management

The customer list in Business Central contains all registered customers with key information such as name, contact details, tax information, credit limit, payment terms, and current status (allowed or blocked from doing business).

It also displays outstanding balances, open orders, and historical profitability. You can create a new customer directly or convert them from contacts and start selling immediately.





Sales Order Management

Manage quotes, blanket orders, and sales orders.

Depending on the business process, you can handle sales as simple invoices or use orders for more comprehensive workflows. Start with a large-volume blanket order and generate multiple orders according to a predefined schedule.

Integrating sales orders with approval workflows, warehouse operations, and planning helps ensure compliance, product availability, and proper management of customer expectations regarding delivery dates.

Partial shipments and consolidated invoicing support more complex and customized sales processes.

Sales Line Suggestions with Copilot

Get help from Copilot to create lines in sales documents such as quotes, orders, blanket orders, and invoices by simply describing what you need in your own words or uploading a file. Copilot interprets the provided information and automatically suggests the corresponding sales lines.

Prices and Discounts on Sales Lines

Manage flexible pricing and discount structures that differentiate special agreements with customers or groups, conditioned by parameters such as minimum quantity, unit of measure, currency, item variant, and validity period.

Automatically apply the lowest price on sales lines when the order meets the defined conditions. Update pricing agreements in bulk using the sales price worksheet.

Campaign Pricing

Link line prices and discounts to sales campaigns to offer special conditions to customers and contacts included in campaign segments. Define validity periods and apply campaign prices and discounts directly in transactions and sales documents.

Sales Invoice Discounts

Automatically calculate discounts by invoice. Configure multiple discount conditions, including minimum amount, discount percentage, and/or service charge.

The discount is calculated at the item line level and is included in the invoice net amount. Calculations can be performed in both local currency and foreign currency.

Alternative Shipping Addresses

Set up multiple shipping addresses for customers who receive goods at different locations. When creating a sales order or invoice, the user can specify exactly where the product should be shipped.

Sales Return Management

Create return orders to compensate customers who received incorrect or damaged items. Receive the returned items and link them to a replacement order.

You can perform partial return receipts or combine multiple returns into a single credit memo.

Ecommerce

Connect your Shopify stores with Business Central and maximize your business productivity.

Manage and view your company and Shopify store information as a single unit. The Shopify connector enables data synchronization, achieving a seamless integration and efficient management of your online store.

With Business Central, you can operate multiple Shopify store scenarios and automate workflows, especially for B2B data synchronization.

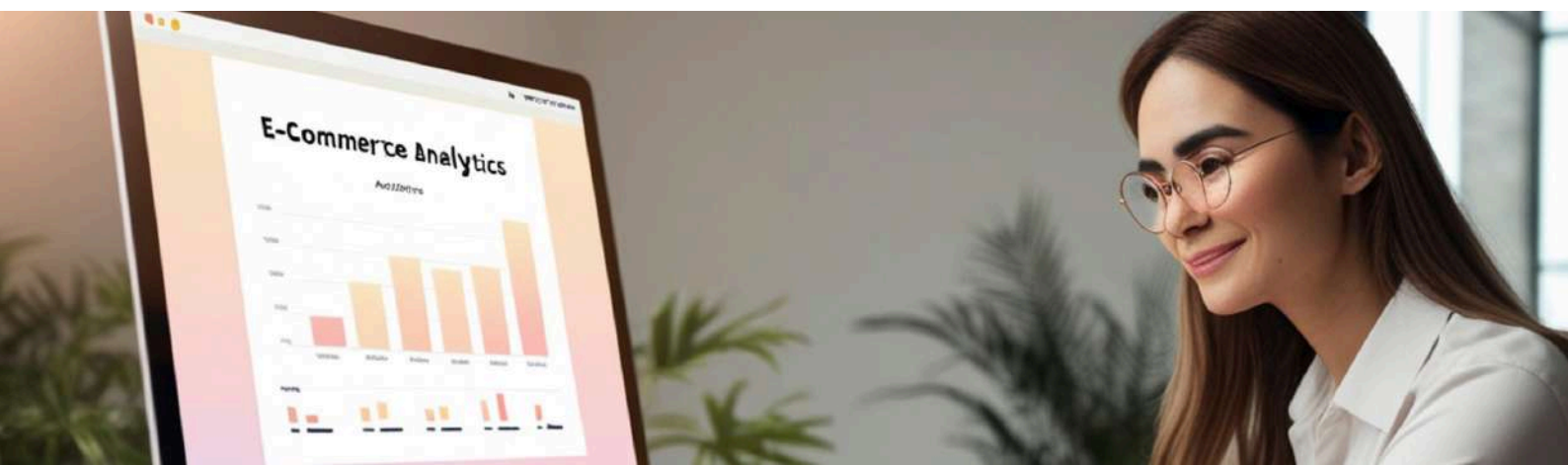
Optimize the management of electronic documents for both accounts payable and accounts receivable, either manually or with the help of Copilot.

The Shopify Connector

The Shopify connector allows you to synchronize items, inventory, customers, as well as sales orders and transactions.

Maximize the productivity of your online store by managing your business and Shopify information as a single unit from Business Central.

Run multiple Shopify store scenarios with Business Central and automate tasks to maintain efficiency. These tasks can run in the background and be scheduled at specific times to avoid interruptions in operations.





Shopify DTC and B2B

Shopify enables you to manage Direct to Consumer (DTC) and Business to Business (B2B) operations from a single place, thanks to its all-in-one platform.

- In DTC, the buyer is created in Shopify as a customer. You can import customers from Shopify in bulk, either manually or through the job queue for recurring updates.
- In B2B, the buyer is created in Shopify as a customer linked to a company.

Easily synchronize Shopify B2B data with Business Central and automate workflows. Synchronize companies, locations, responsible buyers, and catalogs, and offer differentiated prices and discounts for B2B companies.

Item and Inventory Synchronization

Export from Business Central to Shopify the item name, description, images, prices, availability, variants, supplier data, and barcodes.

Automatically synchronize translations from Business Central to Shopify, ensuring consistent product descriptions and details across multiple languages.

Define whether exported items should be immediately visible to buyers or remain in draft mode for review.

Activate specific sales channels from the Shopify connector and simplify workflows. You can choose which channels are activated when synchronizing products, maintaining full control over how products are published across different sales channels.

Customer and Company Synchronization

Retrieve customer information from Shopify for subsequent document processing in Business Central. There are two main options, with multiple possible combinations:

- Use a generic customer for all orders.
- Import customer information directly from Shopify.

The system allows intelligent customer mapping using phone number and email. Additionally, you can use country- or region-specific templates when creating customers, which helps ensure correct tax configurations.



After importing the order, the Shopify connector will automatically create and release a sales document in Business Central, such as a sales order or a sales invoice, with default or specific information, including:

- Customer.
- Item lines.
- Shipping charges.
- Payment method and terms.
- Carrier.
- Salesperson.
- Purchase order (PO) number.

Returns, refunds, cancellations, and order edits are also imported automatically.

You can export posted sales invoices created in Business Central directly to Shopify. This way, buyers can log in to Shopify and access all their invoices, regardless of whether they were created in Shopify or in Business Central.

Shopify POS (Point of Sale)

Shopify POS (Point of Sale) allows you to process transactions and accept payments in person. Shopify POS connects with Shopify's back office as a sales channel, ensuring that inventory, payments, and customer data are fully synchronized while you make sales from your physical store.

Improve traceability and performance reporting by importing team member information from Shopify and assigning them as salespersons in Business Central within sales documents.

Customer Relationship Management (CRM)

Empower your sales team to provide better customer service by establishing best practices for managing campaigns, leads, and opportunities.

Maintain a comprehensive view of your contacts and personalize your approach for each one. Record contact information for all business relationships and specify the individual people associated with each contact. Gain an accurate view of prospects and customers by categorizing your contacts using weighted profiling questions (assigning weights to two questions to identify the value of a third).

You can segment customers into ABC categories, evaluate results to focus campaigns more effectively, create quotes for prospects, and easily send sales documents to specific contacts.

Campaign Management

Organize campaigns for contact segments defined by reusable criteria such as sales, contact profiles, and interactions, and reuse existing segments. Send documents to people of different nationalities in their native language by using campaign management together with interaction and document management.

Opportunity Management

Track sales opportunities. Break down your sales processes into different stages to gain better visibility and manage each opportunity efficiently.

Interaction and Document Management

Record the interactions you have with your contacts, such as phone calls, meetings, or letters, and attach documents like Word, Excel, or TXT files.

In addition, other interactions are recorded automatically, such as sales orders and quotes exchanged with contacts, allowing you to review them when needed.

Email Logging with Microsoft Exchange Server

Log all incoming and outgoing emails sent through Business Central or Microsoft Outlook. Logging can be manual or automatic. Use a server-based solution with Microsoft Exchange Server to keep emails in their native environment and simplify administration.

Better Together with Microsoft Dynamics 365 Sales

Enable integration between Dynamics 365 Business Central and Dynamics 365 Sales to achieve a more efficient lead-to-cash process. Allow users to make better-informed decisions without needing to switch products.

Increase efficiency by ensuring strong integration between accounts and customers, and leveraging cross-functional capabilities across the entire lead-to-cash flow. Use the setup assistant to connect Business Central with the corresponding records in Sales.

Work with pricing in different currencies by linking Business Central price lists with Sales price lists. Check inventory availability directly from Sales and synchronize sales orders with Business Central for fulfillment, invoicing, and payments.





Project Management

Ensure successful execution and profitability of projects through proper planning, resource allocation, tracking, cost control, billing, accounting, and real-time intelligence.

Promise accurate ship and delivery dates based on current and future item availability. When items are not available to meet the date requested by the customer, calculate the earliest ship date either as an Available-to-Promise (ATP) date, based on future uncommitted supplies, or as a Capable-to-Promise (CTP) date, which indicates when the items may become available.

Set up projects efficiently, manage time registration and resources using the Project Manager Role Center, and gain valuable real-time insights and statistics for better decision-making.

Projects

Track projects and the data needed for customer billing.

Manage fixed-price and time-and-materials projects. Create a project plan with multiple tasks and task groups. Each task can have its own budget and cover the period you need.

Copy budgets from one project to another and set up project-specific price lists for item charges, resources, and general ledger expense accounts associated with the customer.

Assign a specific project to a particular customer and bill the project in full or partially. Change the bill-to customer on projects where the service recipient is different from the party paying the invoice.

Use the setup assistant to create projects, easily record timesheets and project journals, and use the Project Manager Role Center to access common tasks, new charts, and the project list. From the project page, you can access tasks, assign responsible parties, and gain visibility into costs and billing. Obtain insights and statistics on current and past activities through project-specific reports in Business Central.

Work in Progress (WIP) Calculation

Work in Progress (WIP) allows you to estimate the financial value of projects in the general ledger while they are still in progress. Track this value through WIP calculation and post the corresponding amounts to the general ledger.

Project Billing

During project execution, costs arising from the use of resources, materials, and project-related purchases can accumulate. Record these transactions in the project journal.

Bill customers upon project completion or at defined intervals according to a billing schedule. You can bill multiple projects, entire projects, subprojects, or individual project planning lines.

Combine planning lines from different projects into a single sales invoice. In advanced projects, different phases can be billed to different customers.

Project-Specific Costs and Pricing

Manage alternative costs for resources and resource groups. Costs can be fixed, percentage-based, or additional fixed charges. Set up prices for items, resources, and general ledger accounts associated with a project.

Project Procurement

Use efficient project-based procurement through the Assembly-to-Order and Create Purchase Order functionalities.

Assembly-to-Order allows you to assemble products according to the customer's specific requirements. The Create Purchase Order function simplifies procurement by allowing you to generate purchase orders directly from the project.

Resource and Capacity Management

Keep track of resources and pricing. Record and sell resources, group related resources into a single group, or manage individual resources. Classify resources as labor or equipment and assign them to specific jobs according to a schedule.

Plan capacity and sales, manage usage statistics, and analyze resource profitability. Create your planning in a calendar system with the level of detail and time period you need. Monitor resource usage and gain a complete view of capacity, including availability and planned costs in orders and quotes.

Timesheets

Record the time spent and obtain approval from the supervisor using the Timesheet, a simple and flexible tool. Timesheets integrate with Service and Project Management and can include resources.





Service Management

Deliver better service experiences through planning, resource allocation, and service contract management.

Assign staff to work orders, manage service contracts, and track service items. Efficiently manage service orders, set service pricing, and integrate with Microsoft Dynamics 365 Field Service to optimize operations and ensure a continuous flow of information. Maintain high service levels, manage warranties, and generate accurate invoices, improving customer satisfaction and operational efficiency.

Scheduling and Dispatch

Assign staff to work orders and record details such as work management and order status. For dispatching, manage service personnel and field technicians' information, filtering by availability, skills, and item stock. Gain a clear view of task prioritization, service workload, and task escalation.

Service Contract Management

Set up agreements with customers regarding service levels. Maintain information about contract history, renewals, and contract templates. Manage warranties for service items and spare parts.

Record details of service levels, response times, discount levels, and the history of each contract, including service items, spare parts used, and hours worked. Measure the profitability of service contracts and generate service contract quotes.

Service Item Management

Register and track all service items, including contract information, component management, references to Bills of Materials (BOM), and warranty data.

Service Order Management

Log post-sales incidents such as service requests, scheduled services, service orders, and repair requests. Allow customers to submit service requests or create them automatically based on the terms of service contracts.

Record and manage equipment loans to customers. Access a complete history of service orders and quotes through the Service Order Register.

Service Pricing Management

Set up, maintain, and monitor service pricing. Define price groups based on criteria such as service items, tasks, or fault types, for specific periods, customers, or currencies.

Define pricing calculation structures that include spare parts, labor, and additional charges. Automatically assign the correct pricing structure to service orders that meet the defined criteria. Set fixed, minimum, or maximum prices per group and view profitability statistics.

Integration with Microsoft Dynamics 365 Field Service

Service organizations require a comprehensive application where finance, inventory, and purchasing are closely integrated with service execution.

Optimize the end-to-end service management process and ensure a smooth flow of information between Business Central and Field Service. Easily create and manage work orders in Field Service, track task progress, assign resources, and record consumption.

When a work order is completed in Field Service, the integration allows automatic data transfer to Business Central for further processing. Generate accurate invoices based on service activities and consumption recorded in Field Service, minimizing manual data entry and maintaining a complete view of service operations and finances.

Human Resources Management

Optimize and improve various Human Resources functions with Business Central's HR tools.

Maintain detailed employee records, manage absences, and administer employee payments. By keeping information up to date, recording and analyzing absences, and processing reimbursements efficiently, you ensure smooth and effective HR operations.

Employees

Maintain detailed employee records in Business Central. Record and manage information such as employment contracts, confidential information, qualifications, employee contacts, as well as relevant social and corporate governance information.

Keep employee records up to date and simplify tasks related to personnel management.





Absence Management

Record employee absences and analyze the information as needed. Log absences on the Absence Register page, where they can be viewed in different ways for analysis and reporting purposes. Filter by absence category or absence period.

Employee Payments

Reimburse employees for expenses incurred during work-related activities. Use general journals for employee accounts, record expenses and reimbursement transactions (including foreign currency transactions), and track amounts by comparing them with supporting documents.

Globalization and Regulatory Compliance

Supports globalization and compliance requirements such as International Financial Reporting Standards (IFRS), local functionalities, GDPR, among others.

Trust in an enterprise management solution is key to operating efficiently. With Business Central, companies can optimize their business processes while consistently and cost-effectively complying with increasingly demanding regulations and reporting requirements.

Data Privacy

Business Central supports data privacy initiatives such as the General Data Protection Regulation (GDPR).

Accounting Processes and Controls to Support Compliance

Companies face increasing challenges in financial accounting. Depending on the industry, markets, geographic location, and financing needs, an organization may be subject to local accounting principles (GAAP) and one or more of the following regulatory frameworks:

- Sarbanes-Oxley Act (SOX): a U.S. law enacted in 2002 to protect investors by improving the accuracy and reliability of corporate financial reporting.
- International Accounting Standards/International Financial Reporting Standards (IAS/IFRS): adopted by the European Union in 2005, they establish international accounting standards for the recognition, measurement, consolidation, and presentation of financial information.
- New Basel Accord (Basel II): implemented in 2006 to address risks in financial institutions and promote greater stability in the global financial system.

In addition to global standards, Business Central also supports country-specific certifications and accreditations:

- Denmark (Compliance with the Danish Bookkeeping Act – registration number fob467715).
- Germany (Audited by BDO in accordance with IDW PS 880).
- India (Audit traceability and edit logs for accounting software in India).

Compliance Standards Management

Provide integrated insights, aligned processes, and easy-to-use tools to help your team meet the financial management expectations and standards relevant to your specific business. Learn more about data privacy and application compliance.

Globalization

Get support for more than 50 languages and over 170 country/region localizations, created through a joint effort between Microsoft and its partners.

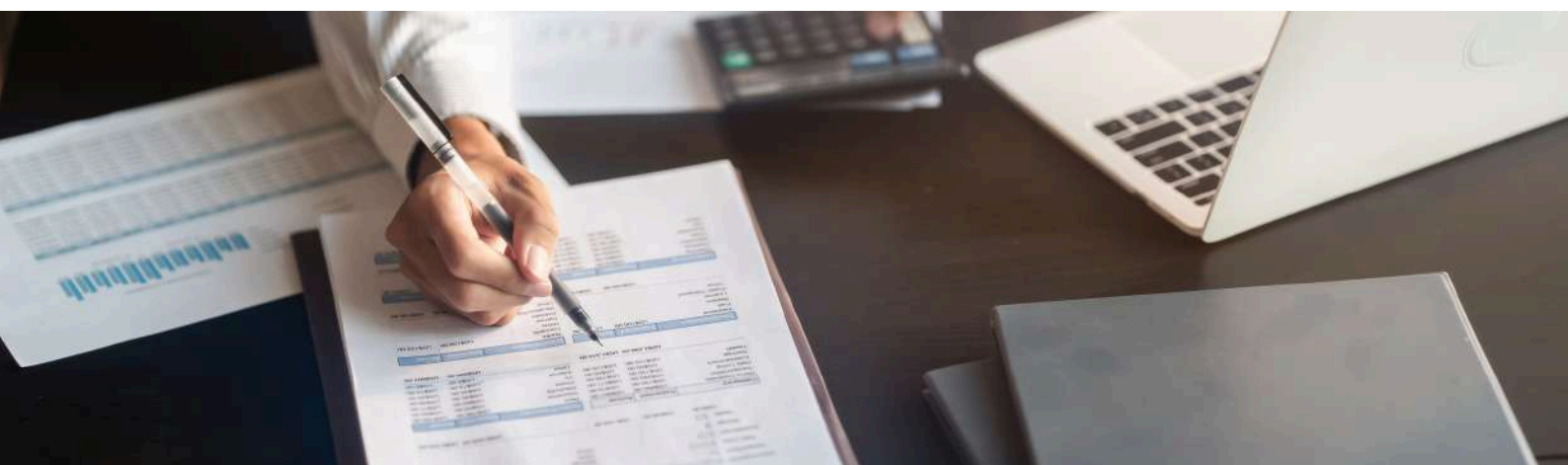
Localizations typically include translations as well as various regulatory functionalities required for specific countries or regions. In some cases, this involves new functionalities (such as IRS 1099, Intrastat, SII, MTD, among others), while in other cases it involves adapting existing functionalities to meet local requirements.

If your country does not have a localization included by Microsoft by default, you can use specialized extensions available in the Microsoft AppSource business apps marketplace to meet local requirements.

Administration

Manage the administration of Business Central environments to ensure smooth and efficient operations.

Administer Business Central environments as an internal or delegated administrator and perform essential tasks such as configuration, updates, and troubleshooting to ensure effective and efficient administration.





Admin Center

The Admin Center provides a centralized tool where administrators can manage the lifecycle operations of environments, configure environment settings, and monitor them in real time through service health status, telemetry sent to Application Insights resources, and session management.

Product Lifecycle Management

Business Central receives continuous updates and improvements. Administrators can schedule minor and major monthly updates on their preferred day, within a daily maintenance window configured outside business hours to avoid disruptions. Business Central environments also receive continuous updates through hotfixes to resolve issues in the current version.

Scalability

Gain resource elasticity through real-time auto-scaling based on data and dynamic load distribution to support your workloads. Business Central automatically scales the resources assigned to your environment to efficiently handle your business's workload volume.

Real-time telemetry and performance metrics determine scaling needs and are managed with a priority on your privacy.

Data Export

In Business Central, you can create a full copy of your company data and export it to a .bacpac file in your own Azure Storage account at any time. This functionality makes it easier to move your data to another financial system if you decide to cancel your Business Central subscription.

Restore and Copy Environments

As an administrator, you can restore an existing environment to any state within the last 28 days, allowing you to correct errors or compare previous states with the current state.

Additionally, database backups are an essential part of any business continuity and disaster recovery strategy, as they protect your data from corruption or deletion. Business Central uses Azure SQL Database as the underlying technology for backing up its environments. All databases are protected through automated backups that the Azure SQL service continuously creates and maintains. You can also copy an environment to and from any type, Sandbox or Production. For example, you can copy your Production environment to a Sandbox environment to troubleshoot an issue or test an extension update.

Monitoring and Alerts

Business Central generates telemetry data for various activities and operations within environments and applications/extensions. Monitoring telemetry gives you visibility into the activities and overall health of your environments and applications, making it easier to diagnose issues and analyze operations that affect performance.

Azure Application Insights is a hosted Azure service that collects telemetry data for analysis and visualization. Whether you use Business Central online or on-premises, you can configure your tenants to send telemetry to Azure Application Insights.

If an event occurs in your environment or application that requires attention, you can set up a system to send you alerts. Azure Application Insights makes it easy to define and configure these types of alerts.

Security

Protect your Business Central environments with comprehensive security features.

Business Central's security features are designed to provide complete protection for your data and environments.

They allow you to control user access to data within environments and databases, classify and manage sensitive information, track and monitor changes to data, and use Microsoft Purview to support security, legal, and compliance investigations.

Permissions

Business Central's security system controls which functionalities and data a user can access within each database or environment, in combination with the user's license. You can specify for each user whether they have permission to read, modify, or enter data in database objects.

Use Microsoft Entra ID to enable group-based access control, ensuring that only group members can access specific resources and applications.

Microsoft Purview

Microsoft Purview auditing solutions provide an integrated solution that helps organizations respond effectively to security incidents, forensic investigations, internal investigations, and compliance obligations.





Your Business Central environments automatically emit auditable events to Microsoft Purview auditing solutions. In Business Central, this means that create, update, and delete events requiring administrator privileges are logged in Purview's unified audit log, facilitating security, legal, and compliance investigations across all Microsoft services used by your organization.

Sensitive Data Management

With access to database tables, you can classify fields that contain sensitive or personal data. Add a second level of classification by specifying sensitivity levels for data stored in standard and custom fields.

Data sensitivity classification helps identify where personal information is stored in the system and facilitates responding to data subject requests, for example, when a contact or customer requests the export of their personal information. You can bulk classify field sensitivity using the Data Classification Worksheet when managing large volumes of information, and then adjust the classification of specific fields. It also enables responses to user-related personal data requests, such as portability, deletion, or correction requests.

Change Tracking

Gain full visibility into data changes. Change tracking allows you to trace all direct modifications a user makes in the database.

To add an extra layer of security, you can monitor changes to specific fields, such as those containing sensitive data, by configuring field monitoring.

Use the Data Analysis feature to calculate, summarize, and examine information. On some pages, you can view an activity log that shows the status and errors of files exported or imported in Business Central. Additionally, you can create retention policies to delete unnecessary data from records after a defined period.

Security Policy Sharing

Administrators can use security groups to simplify user permission management. In Business Central online, these groups are reusable across Dynamics 365, SharePoint, and Business Central applications.

Administrators assign permissions to Business Central security groups, and when users are added to the group, those permissions are automatically applied to all members. For example, an administrator can create a security group that allows salespeople to create and post sales orders, or allows buyers to do the same with purchase orders.



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Multi-Factor Authentication (MFA)

Before users can sign in to Business Central, they must be authenticated as valid system users. Business Central uses Microsoft Entra ID authentication.

When using Microsoft Entra authentication with Business Central, it is recommended to leverage multi-factor authentication (MFA). MFA strengthens security for application and data access by providing single sign-on through various verification options, such as phone calls, text messages, mobile app notifications, or one-time passwords.

It can be used in both on-premises and cloud environments to add security to access Microsoft online services, remote access applications, and more. Entra Conditional Access allows administrators to define specific authentication policies for Business Central, such as requiring MFA for access to the application.

Workflows and Automation

Use workflows and other automation tools to streamline your business processes.

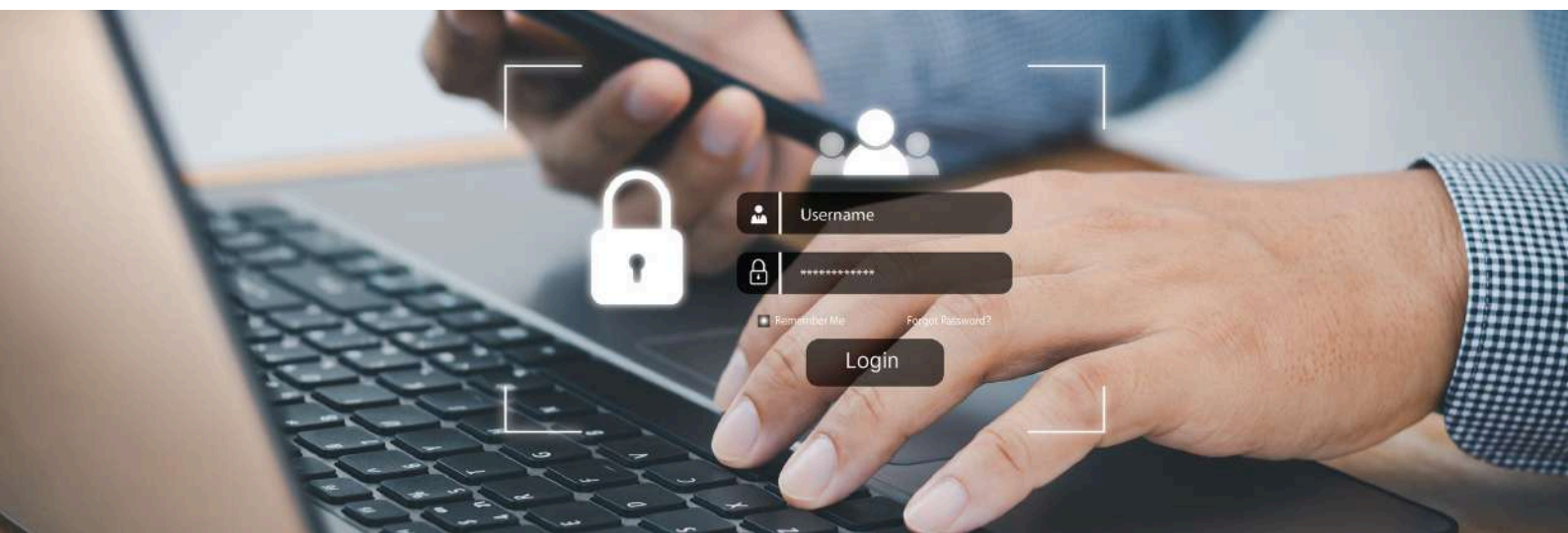
Workflows automate repetitive tasks, reducing the need for manual intervention and speeding up processes. In Business Central, you can create custom workflows tailored to your business's specific needs and use other automation options, such as the Job Queue, to maximize efficiency.

Approval Workflows in Business Central

Set up approval workflows based on the built-in workflow templates in Business Central. The solution offers numerous preconfigured workflows represented by templates that you can copy and adapt to create new workflows.

Examples of approval events include the creation of sales and purchase orders, quotes or invoices, price changes, supplier or customer modifications, among others.

You can extend approval workflows using Power Automate to cover specific business scenarios that are not available by default.



Workflows with Power Automate

Power Automate is a no-code/low-code solution that enables the creation of business workflows, known as flows.

Integration with Business Central allows you to connect with cloud services such as Dataverse, Outlook, Teams, and many others, and create flows that use multiple data sources.

Configure and use flows to connect business process tasks performed by different users. You can define automated flows that are triggered by events (such as the creation, modification, or deletion of records or documents) or that run automatically according to a user-defined schedule.

You can also create and run instant flows directly from a Business Central record, such as a customer, an item, or a sales order, with options to manipulate information both internally and externally.

Background Processing

Increase productivity through background processing. Use the Job Queue to schedule the execution of repetitive tasks.

You can define specific jobs to run at predetermined intervals or times, ensuring that critical processes such as reporting, integrations, updates, and data processing are executed consistently and without manual intervention.

This way, your team can focus on more strategic activities while the system handles operational tasks. You will receive notifications if any job fails to process correctly.

Industry Solutions

Find the right solution for your business on Microsoft AppSource and connect it to your Business Central environments.

Although Business Central supports multiple industries, some sectors require specialized expertise. Partners can offer tailored industry solutions and industry-specific consulting to ensure optimal setup.

Microsoft AppSource

Microsoft AppSource is an online marketplace that contains thousands of business applications and services developed by leading software providers in the industry. It offers a wide range of applications that extend and enhance the functionality of Business Central.

Through AppSource, you can search for, try, purchase, and deploy business software and services that help you manage your operations. From within Business Central, you can easily discover, view, sort, and filter the available applications that integrate natively with the system.

This integration enables companies to find solutions tailored to their specific needs, whether in finance, supply chain, sales, or other business processes.

Some examples of industries with notable solutions on AppSource include:

- Agriculture.
- Automotive.
- Chemical Industry.
- Construction.
- Consumer Electronics.
- Consumer Goods.
- Entertainment.
- Fashion.
- Food and Beverage.
- Healthcare.
- Jewelry.
- Medical Equipment.
- Pharmaceutical.
- Printing.
- Property Management.
- Real Estate.
- Restaurants and Food Services.
- Retail.
- Telecommunications.

- Transportation.
- Travel and Tourism.
- Utilities.
- Waste Management.

This is not an exhaustive list of industry or vertical solutions. In AppSource, you can find more than 7,000 solutions to help you identify the one that best fits your business.

Customization and Integration Capabilities

Customize and extend your Business Central experience using the tools available within the product.

Business Central offers standard functionalities that meet the needs of many companies; however, it is also highly customizable to adapt to specific requirements. You can extend Business Central through complementary applications (add-ons), vertical or horizontal solutions, and integrate it with other third-party products and services.

No-Code Customization

Business Central offers both user-level customization and advanced customization for administrators.





Customization allows users to tailor their workspace by adjusting page layouts according to their preferences. Administrators can customize page layouts for a specific profile based on business roles or departments, so that all assigned users see the same personalized page.

For most simple UI changes, the browser-based Designer enables you to quickly adjust the UI for all users in the organization without writing any code. You can hide unnecessary columns, drag and drop fields and charts to reorganize them, save bookmarks to frequently used lists, or display data fields that were previously hidden.

Development

Using Visual Studio Code and the AL language extension for Business Central, it is possible to customize existing pages and tables by creating page and table extensions, or to add new tables and pages to implement entirely new functionalities. You can also develop business logic using AL.

Additionally, AL developers can extend Business Central's functionality in multiple ways: extending tables, enums, application areas, pages, reports, codeflows, and the security model. They can even contribute directly to the core application through open-source projects corresponding to the system's application modules.

Integration Capabilities

Business Central offers extensive integration capabilities with third-party systems, allowing you to expand and enhance the platform experience.

Web Services / APIs

RESTful web services are commonly used to exchange data between Business Central and external systems. You can use these services to retrieve data from Business Central and utilize it in other applications, such as Power BI, Microsoft Power Apps, custom .NET applications, and more. Business Central includes a wide list of built-in APIs that require no code development and only minimal configuration to use.

For developers, Business Central both on-premises and in the cloud exposes an API that enables integration with other services. Once API access is enabled, you can write code to integrate your web service or SaaS solution with Business Central.

Creating integrations through an API provides easy access to supported functionality through a single endpoint, offering a simplified experience for developing a single application with integrations across multiple Microsoft products.

Microsoft Dataverse through Data Synchronization

Dataverse combines data into a single logical set, making it easier to connect Business Central with other Dynamics 365 applications. It allows data to be synchronized from or to one Dynamics 365 business application to another, or in both directions, almost in real time through Dataverse.

For example, if you integrate Business Central with Dynamics 365 Sales, a salesperson can create a sales order in Dynamics 365 Sales and it will automatically synchronize with Business Central. Dataverse securely stores the data in a set of tables, which are collections of records similar to database tables. Dataverse includes a base set of standard tables that cover common scenarios, but you can also create custom tables specific to your organization.

Microsoft Dataverse through Virtual Tables

Business Central Virtual Table is an additional solution published on AppSource that enables create, read, update, and delete (CRUD) operations from Microsoft Dataverse and Microsoft Power Platform. Tables are used to model and manage business data. When developing an application, you can use standard tables, virtual tables, or both.

Now, makers can build experiences in Power Apps using data directly from Business Central. Virtual tables rely on the APIs exposed in Business Central, and custom APIs can also be used to generate virtual tables.

Migration

To keep up with business demands and rapid changes, companies are moving their operations to the cloud. Organizations running their workloads on-premises and wishing to migrate to the cloud can easily do so with Business Central online. By moving to the cloud, users gain the benefits of cloud scenarios such as Copilot, Power BI, Power Automate, among others, to drive suggested actions. This process ensures that your company can make the most of cloud capabilities, including greater scalability, security, and accessibility.





Migrating to the Cloud

It's time to go beyond enabling remote work and take the next step in your digital transformation journey. Take advantage of Business Central's cloud-powered capabilities, such as built-in AI and many others. You can use the included migration tools to transfer data to Business Central online from specific product versions.

By moving your business to the cloud, you inherit the secure foundation provided by Azure, with built-in, multi-layered security controls and advanced threat intelligence, enabling companies to stay protected against constantly evolving risks.

Migrate from On-Premises

Migrate from on-premises environments or from Dynamics NAV to adapt to remote work, supply chain disruptions, increasing customer demands, and security risks. Gain access to digital tools and eliminate costs associated with continuous updates and maintenance. Stay always up to date with Microsoft's latest and most secure cloud technology. Use the built-in migration tools to transfer data to Business Central online from specific versions.

Migrate from Dynamics GP

Use Dynamics GP Cloud Migration Setup if you are using Dynamics GP 2015 or later to migrate master, transactional, and historical data from Dynamics GP to Dynamics 365 Business Central. Take advantage of short videos that make the process easier to understand by explaining the differences and similarities in workflows at: aka.ms/BCandGP.

Migrate from Dynamics SL

Use the Dynamics SL Cloud Migration tool to transfer master, transactional, and historical data from Dynamics SL to Dynamics 365 Business Central, ensuring a smooth transition. Take advantage of the continuous updates and ongoing innovation in Business Central, positioning your company for greater productivity and agility.



¡Thank you!

Learn more about Microsoft Dynamics 365 Business Central.

Take advantage of these additional resources to explore the benefits of Dynamics 365 Business Central in more depth.

1

[Dynamics 365 Business Central](#)

2

[Solicitar un demo](#)

3

[Localización Business Central](#)

4

[Demo Business Central](#)



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