

innovia  
CONSULTING



Catch the Wave  
Surfing Through Business Central's Latest Release

# Today's Presenters



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**Gino Pack**

Solution Architect

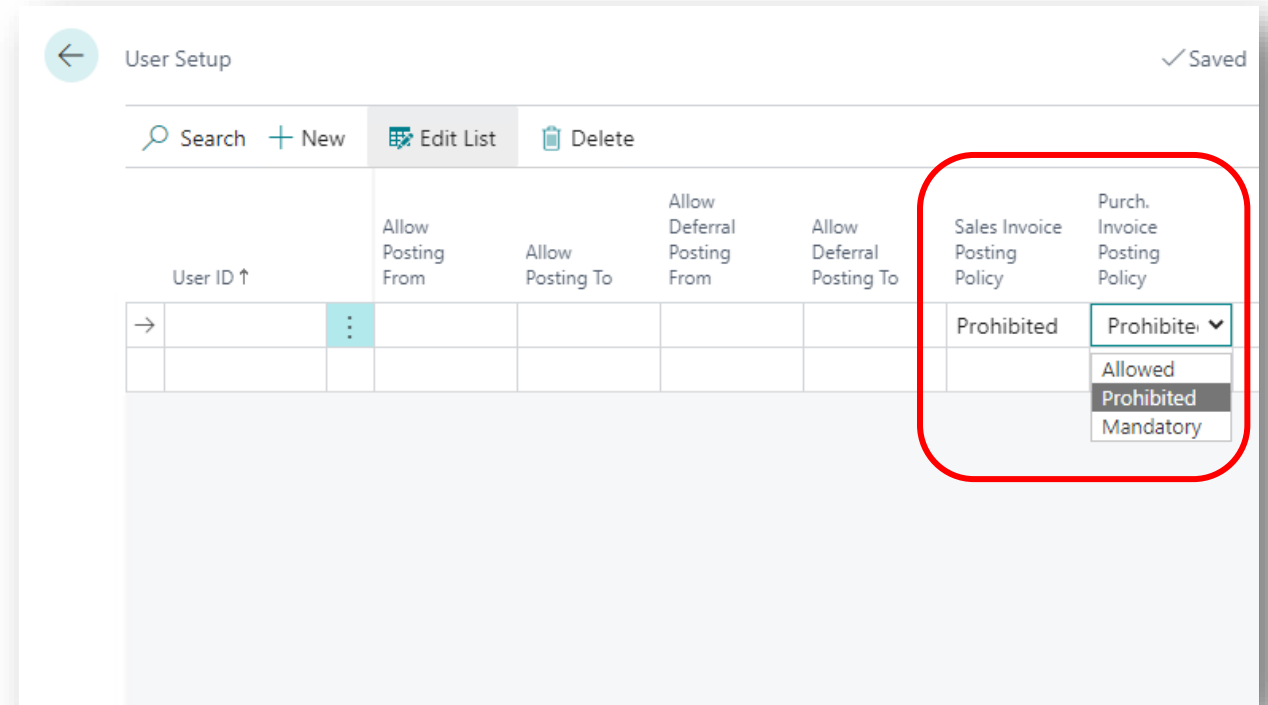
[gpack@innovia.com](mailto:gpack@innovia.com)

# Application Improvements



# Invoice Posting Policies

- **Allowed (Default):** Keep the current behavior, where a user can choose the posting option, such as Ship, Invoice, and Ship and Invoice.
- **Prohibited:** Prevent the user from posting invoices. Business Central will show a confirmation dialog that provides only the Ship or Receive options.
- **Mandatory:** Allow the user to post invoices together with receipts or shipments. Business Central will show a confirmation dialog with the Ship and Invoice or Receive and Invoice options.



*Sales orders  
Sales return orders  
Purchase orders*

*Purchase return orders  
Warehouse shipments  
Inventory picks  
Inventory put-aways*



# Intercompany Improvements

Settings consolidated to one action ribbon

The screenshot shows the 'Intercompany Setup' interface. At the top, a ribbon contains the following actions: 'Add IC Partner', 'IC Chart of Accounts', 'IC Dimensions', 'Automate', and 'Fewer options'. Below this is the 'General' section with fields for 'IC Partner Code' (ICP01), 'IC Inbox Type' (Database), 'Synchronisation Partner', and 'IC Inbox Details'. To the right of these fields are toggle and dropdown options for 'Auto. Send Transactions', 'Default IC Gen. Jnl. Template', and 'Default IC Gen. Jnl. Batch'. A 'Diagnostics' panel on the right shows 'Issues Found' with two categories: 'IC Partner Configuration' (0) and 'IC Mappings' (2). Below the general settings is a table titled 'Intercompany Partners' with columns for Code, Name, Country/Regi... Code, Currency Code, Inbox Type, Inbox Details, Auto. Acc... Tran..., Customer No., Vendor No., Receivables Account, and Payables Account. The table is currently empty, displaying '(There is nothing to show in this view)'. A red box highlights the ribbon, another red box highlights the table, and a third red box highlights the diagnostics panel. Red arrows point from external text boxes to these elements.

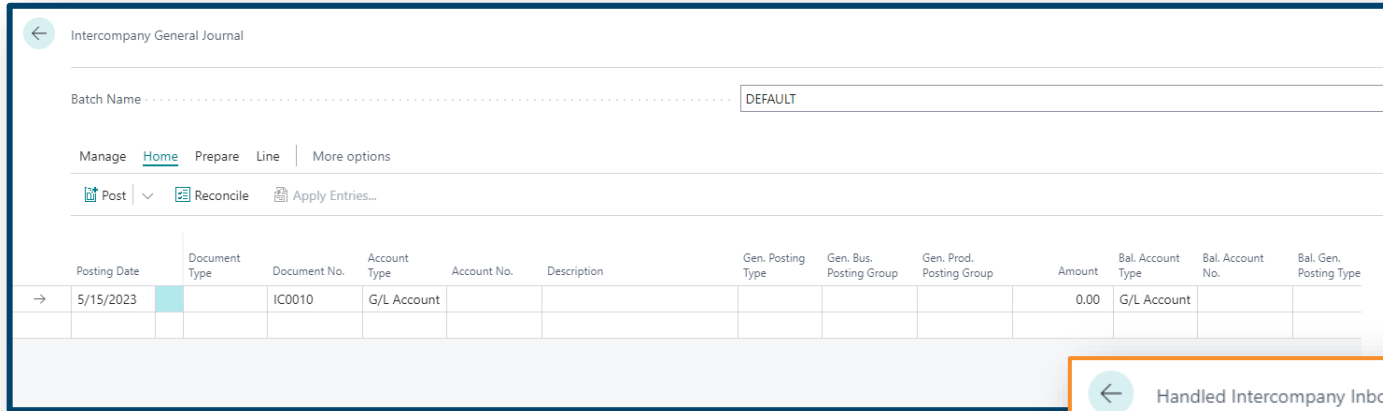
View all IC Partners

IC Setup Validation

Setups



# Intercompany Improvements



Intercompany General Journal

Batch Name: DEFAULT

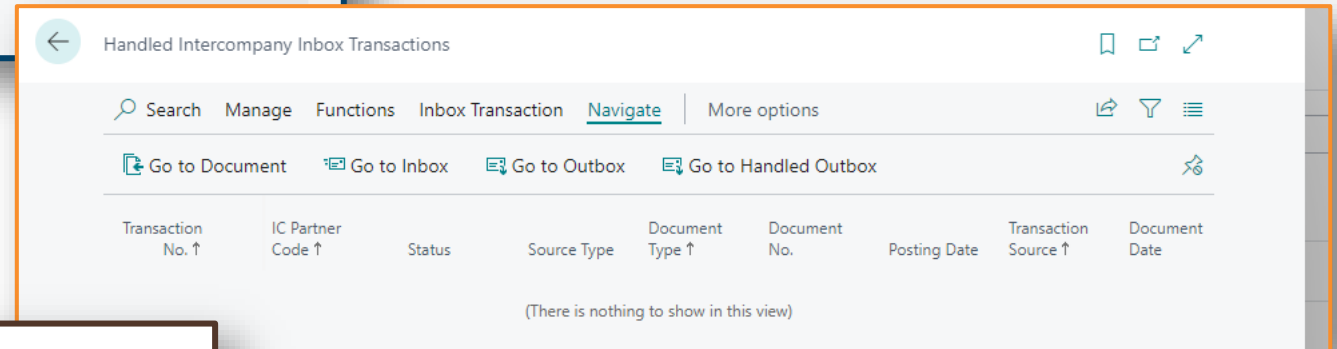
Manage Home Prepare Line More options

Post Reconcile Apply Entries...

Posting Date	Document Type	Document No.	Account Type	Account No.	Description	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount	Bal. Account Type	Bal. Account No.	Bal. Gen. Posting Type
5/15/2023		IC0010	G/L Account						0.00	G/L Account		

Handle bank transactions on the IC General Journals page.

Inbox/Outbox Improvements



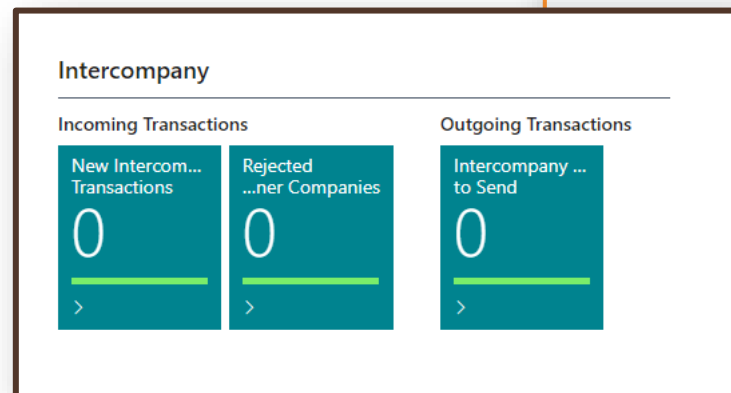
Handled Intercompany Inbox Transactions

Search Manage Functions Inbox Transaction Navigate More options

Go to Document Go to Inbox Go to Outbox Go to Handled Outbox

Transaction No. ↑	IC Partner Code ↑	Status	Source Type	Document Type ↑	Document No.	Posting Date	Transaction Source ↑	Document Date
(There is nothing to show in this view)								

User Experience



Updated Role Center Queue



# Review G/L Accounts Faster

10300 Petty Cash

Review G/L Entries

<input type="checkbox"/> Reviewed	Posting Date	Amount	Credit Amount	Debit Amount	G/L Account No.	Reviewed By	Reviewed
<input checked="" type="checkbox"/>	3/26/2023	4,828.60		4,828.60	10300		
<input checked="" type="checkbox"/>	3/26/2023	704.92		704.92	10300		
<input checked="" type="checkbox"/>	3/25/2023	4,596.16		4,596.16	10300		
<input type="checkbox"/>	3/23/2023	21,149.34		21,149.34	10300		
<input type="checkbox"/>	3/23/2023	3,227.70		3,227.70	10300		
<input type="checkbox"/>	3/22/2023	404.34		404.34	10300		
<input type="checkbox"/>	3/21/2023	403.01		403.01	10300		
<input type="checkbox"/>	3/20/2023	412.59		412.59	10300		
<input type="checkbox"/>	3/19/2023	1,001.40		1,001.40	10300		
<input type="checkbox"/>	3/18/2023	230.58		230.58	10300		
<input type="checkbox"/>	2/22/2023	4,999.17		4,999.17	10300		
<input type="checkbox"/>	2/21/2023	17,421.09		17,421.09	10300		
<input type="checkbox"/>	2/21/2023	2,825.66		2,825.66	10300		
<input type="checkbox"/>	2/20/2023	404.34		404.34	10300		
<input type="checkbox"/>	2/19/2023	412.59		412.59	10300		
<input type="checkbox"/>	2/17/2023	801.12		801.12	10300		
<input type="checkbox"/>	2/17/2023	172.94		172.94	10300		
<input type="checkbox"/>	2/16/2023	-3,584.92	3,584.92		10300		
<input type="checkbox"/>	2/15/2023	-1,098.90	1,098.90		10300		

Debit (\$) 4,596.16      Balance -4,596.16  
 Credit (\$) 0.00      Review Policy Allow Review and Match Balance

10100 · Checking account

Home Account Balance Navigate More options

Posted Documents w...t Incoming Document Apply Template...

**General**

No. 10100      Balance 0.00

Name Checking account      Reconciliation Account

Income/Balance Balance Sheet      Automatic Ext. Text

Account Category Assets      Direct Posting

Account Subcategory Cash      Blocked

Debit/Credit Debit      Last Date Modified 3/24/2023

Account Type Posting      Omit Default Descr. in Jnl.

Totaling      Review Policy **None**

**Posting**

None  
 Allow Review  
 Allow Review and Match Balance

To speed up the period-end process of reviewing and reconciling G/L accounts, you can review the G/L entries for G/L accounts and mark the entries as Reviewed.

Options:

- None
- Review Allowed
- Review allowed & match balance



# Statistical Accounts

Statistical Accounts

× There is no demonstrational data available. Would you like to create the demonstration... Create demonstrational d...

Search + New Manage Statistical Accounts Journal Dimensions Ledger Entries

No. ↑	Name	Blocked	Balance
EMPLOYEES	Number of Employees	<input type="checkbox"/>	70.00
OFFICESPACE	Office/prod space in m2	<input type="checkbox"/>	2,820.00

Statistical Account Journal

Batch Name: DEFAULT

Manage Register Dimensions Ledger Entries More options

Posting date	Document No.	Statistical Account No.	Description	Amount	Department Code	Customergroup Code
4/10/2022				0.00		

- ✓ Define your statistical accounts
- ✓ Create your entries in the journal
- ✓ Review in the Statistical Account Ledger Entries
- ✓ Utilize in Income statements & other financial reporting.

Statistical Account Ledger Entries

Search Dimensions Statistical Accounts Journal Reverse Transaction... More options

Posting date ↓	Statistical Account No.	Description	Amount	Entry No.	Department Code	Customergro... Code
4/9/2023	EMPLOYEES	Headcount reduction for ADM.	-11.00	6	ADM	
3/26/2023	EMPLOYEES	Hired for ADM.	14.00	5	ADM	
3/8/2023	EMPLOYEES	Hired for PROD.	4.00	4	PROD	
2/11/2023	EMPLOYEES	Initial headcount of SALES.	23.00	3	SALES	
1/8/2023	EMPLOYEES	Initial headcount of PROD.	10.00	2	PROD	
12/12/2022	EMPLOYEES	Initial headcount of ADM.	30.00	1	ADM	



# Sync Master Data Across Companies

- ✓ Subscribe to data from another company.
- ✓ Define tables and fields to synchronize.
  - ✓ Filter on records that you would like to synchronize,
- ✓ Changes in the main company are immediately pulled to the receiving companies by the job queue.
  - ✓ All changes can be reviewed via synchronization logs.



# Sync Master Data Across Companies

Synchronization Tables ✓ Saved 🔖 📄 🔗

🔍 Search + New ✎ Edit List 🗑️ Delete 📄 Fields 📄 Synchronization Log ⋮ 🔗 🔍 ☰

**i** The view is filtered, and the entry is outside the filter. Some actions may not work. ✕

Status	Table	Over... Local Chan...	Synchronize Changes Since	Table Filter
Disabled	Contact	<input type="checkbox"/>	5/21/2023 6:09 PM	<Edit table filter>
Enabled	Country/Region	<input type="checkbox"/>	5/21/2023 6:09 PM	
Enabled	Currency	<input type="checkbox"/>	5/21/2023 6:09 PM	
Enabled	Currency Exchange Rate	<input type="checkbox"/>	5/21/2023 6:09 PM	
→ Enabled	⋮ Customer	<input type="checkbox"/>	5/21/2023 6:09 PM	<Edit table filter>
Enabled	Customer Posting Group	<input type="checkbox"/>	5/21/2023 6:09 PM	
Enabled	Dimension	<input type="checkbox"/>		
Enabled	Dimension Value	<input type="checkbox"/>		

**Table Selection**

# Sync Master Data Across Companies

Synchronization Fields | Search | Edit List | Update Fields | Enable | Disable | ...

Status	Field No.	Field Caption	Validate Field	Overwrite Local Change
→ Enabled	1	No.	<input type="checkbox"/>	<input type="checkbox"/>
Enabled	2	Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disabled	3	Search Name	<input type="checkbox"/>	<input type="checkbox"/>
Enabled	4	Name 2	<input type="checkbox"/>	<input type="checkbox"/>
Enabled	5	Address	<input type="checkbox"/>	<input type="checkbox"/>
Enabled	6	Address 2	<input type="checkbox"/>	<input type="checkbox"/>
Enabled	7	City	<input type="checkbox"/>	<input type="checkbox"/>
Disabled	8	Contact	<input type="checkbox"/>	<input type="checkbox"/>

Field Selection

# Sync Master Data Across Companies

MDM\_CUSTOMER

Integration Synchronization Jobs | Search | Delete Entries Older Than 7 Days | Delete All Entries | More options

Start Date/Time ↓	Finish Date/Time	Duration	Inserted	Modified	Deleted	Unchanged	Failed	Skipped	Direction
<u>5/21/2023 6:09 PM</u>	5/21/2023 6:09 PM	277 millisecon...	0	0	0	0	0	0	to Customer.

## Synchronization Log

# Notable Mentions

- ✓ Easier to create opening balances for item tracked inventory.
- ✓ Post multiple transfer orders at the same time.
- ✓ Preview item journals and 20 other journals and documents before posting
- ✓ Adjust exchange rates easily, replace the built-in batch job
- ✓ Financial Reporting replaces Account Schedules!
- ✓ Undo Shipment on Transfer Orders



# Switch Companies

Dynamics 365 Business Central

Environment: Sandbox22

CC - Jim | Sales & Purchases | Reference

Warehouse Shipments | Warehouse Receipts | Tr

Environment: Sandbox22

Good afternoon, Augenstein!

Assembly Orders | Picks | Put-away | More

- Movement List
- Whse. Shipment Status
- Warehouse Bin List
- Whse. Adjustment Bin
- Warehouse Physical Inventory List
- Phys. Inventory List
- Customer - Labels

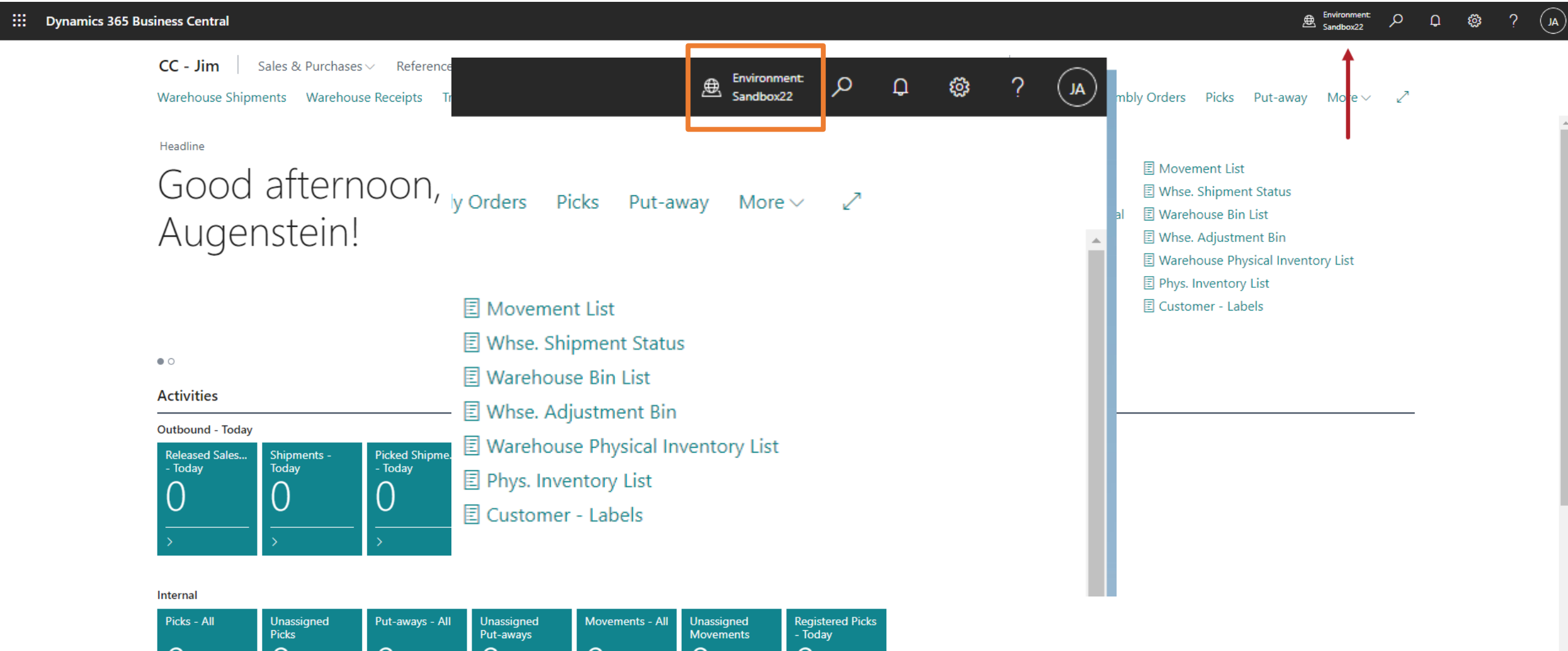
Activities

Outbound - Today

Released Sales... - Today 0	Shipments - Today 0	Picked Shipme... - Today 0
--------------------------------	------------------------	-------------------------------

Internal

Picks - All	Unassigned Picks	Put-aways - All	Unassigned Put-aways	Movements - All	Unassigned Movements	Registered Picks - Today
-------------	------------------	-----------------	----------------------	-----------------	----------------------	--------------------------





Environment: Sandbox22

### Available Companies

Sandbox22

- ADV-GPTest
- CC - Jim
- CRONUS USA, Inc.
- My Company
- WMS-CC-GinoTest

Production

- AND Andrea

Sandbox

- CRONUS USA, Inc.

Sandbox\_Dev

- CRONUS USA, Inc.

Environment: Sandbox22

### Available Companies

WM

Sandbox22

- WMS-CC-GinoTest

Environment: Sandbox22

### Available Companies

WM

Sandbox22

- WMS-CC-GinoTest

Switch

- Switch
- Open in new tab

Production (0)

Sandbox\_Dev (0)

in another tab, without affecting your current tab and settings.

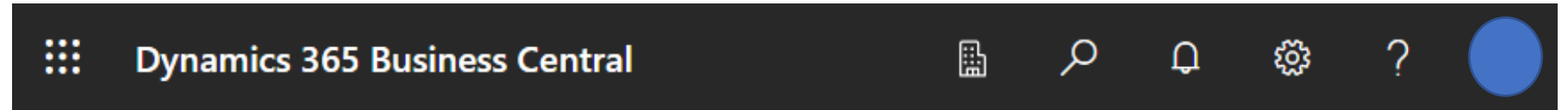


# Iconography

- 1 Company



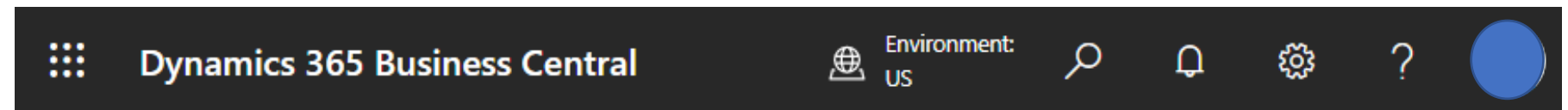
- Multiple Companies



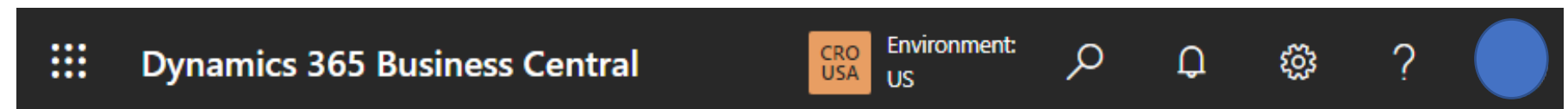
- Current Company with Badge



- Multiple Environments



- Multiple Environments with Company Badge





# Modern Action Bar

106001 · Fabrikam, Inc.

Home Prepare Print/Send Request Approval Order Actions Related Automate Fewer options

Post... Release Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

## General

Show more

Vendor Name	Fabrikam, Inc.	Vendor Invoice No.	*
Contact		Vendor Shipment No.	
Document Date	6/1/2022	Status	Open

## Lines

New Line Delete Line Select items...

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax
→ Item	WRB-1000	Whole Roasted Beans, Columbia	YELLOW		100	-	PCS	10.00		*

Subtotal Excl. Tax (USD)	1,000.00	Total Excl. Tax (USD)	1,000.00
Inv. Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	1,000.00

Details Attachments (0)

## Vendor Statistics

Vendor No.	10000
Balance (\$)	0.00
Balance (LCY) As Customer	0.00
Outstanding Orders (\$)	4,040.00
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	0.00
Total (\$)	4,040.00
Overdue Amounts (\$) as of 0...	0.00
Invoiced Prepayment Amoun...	0.00
Payments (\$)	0.00
Refunds (\$)	0.00
Last Payment Date	-

## Buy-from Vendor History

Vendor No. 10000

0	0	3
Quotes	Blanket Orders	Orders

# Modern Action – Pin Action Bar

Home Prepare Print/Send Request Approval Order **Actions** Related Automate Fewer options

## General

Vendor Name:  Vendor Invoice No.:  Show more

Contact:  Vendor Shipment No.:

Document Date:  Status: Open

Lines Manage Line Functions Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax
→ Item	WRB-1000	Whole Roasted Beans, Columbia	WHITE		2	—	BAG	480.00		*
Item	WRB-1001	Whole Roasted Beans, Brazil	WHITE		8	—	PCS	10.00		*

Subtotal Excl. Tax (USD)	1,040.00	Total Excl. Tax (USD)	1,040.00
Inv. Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	1,040.00

Invoice Details >

**Details** Attachments (0)

## Vendor Statistics

Vendor No.	10000
Balance (\$)	0.00
Balance (LCY) As Customer	0.00
Outstanding Orders (\$)	4,040.00
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	0.00
Total (\$)	4,040.00
Overdue Amounts (\$) as of 0...	0.00
Invoiced Prepayment Amoun...	0.00
Payments (\$)	0.00
Refunds (\$)	0.00
Last Payment Date	—

## Buy-from Vendor History

Vendor No. 10000

0	0	3
Quotes	Blanket Orders	Orders
0	0	0
Invoices	Return Orders	Credit Memos

# Modern Action Bar – Personalize Actions

[←](#) Purchase Order ✎ 📄 + 🗑️  
 106003 · Fabrikam, Inc.  
[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Order](#) | [Actions](#) ▾ | [Related](#) ▾ | [Automate](#) ▾ | [Fewer options](#)  
[Post...](#) ▾ | [Release](#) ▾ | [Create Whse. Receipt](#) | [Create Inventory Put-away/Pick...](#) | [Send Intercompany Purchase Order](#) | [Archive Document](#)

**General** Show more

Vendor Name .....  .....  
 Document Date .....  .....  
 Contact .....  .....  
 Vendor Invoice No. .... \*  .....  
 Vendor Shipment No. ....  .....  
 Status ..... **Open**

**Lines** | [Manage](#) | [Line](#) | [Functions](#) | [Order](#) 🔗 📄

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Tax Area Code	Tax Group Code	Lin
→ Item	WRB-1000	Whole Roasted Beans, Columbia	WHITE		2	-	BAG	480.00		*	
Item	WRB-1001	Whole Roasted Beans, Brazil	WHITE		8	-	PCS	10.00		*	

Subtotal Excl. Tax (USD) .....  .....  
 Invoice Discount % .....  .....  
 Total Tax (USD) .....  .....  
 Inv. Discount Amount (US... ..  .....  
 Total Excl. Tax (USD) .....  .....  
 Total Incl. Tax (USD) .....  .....

**Invoice Details** >

**Shipping and Payment** >

**Prepayment** >

|

**Settings** ✕

**Dynamics 365 Business Central**

- Personalize
- Design
- My Settings
- Company information
- Assisted setup
- Advanced settings
- Admin Center

**Details** | **Attachments** (0)

**Vendor Statistics**

- Vendor No.
- Balance (\$)
- Balance (LCY) As Customer
- Outstanding Orders (\$)
- Amt. Rcd. Not Invd. (\$)
- Outstanding Invoices (\$)
- Total (\$)
- Overdue Amounts (\$) as of 05/17/23
- Invoiced Prepayment Amount (\$)
- Payments (\$)
- Refunds (\$)
- Last Payment Date

**Buy-from Vendor History**

Vendor No.

0	0	0
Quotes	Blanket Orders	Orders
0	0	0
Return Orders	Credit Memos	Pstd. Retn Shipment
0	0	0
Ret. Credits	Intercompany	



# Data Analysis On Lists



Item Ledger Entries

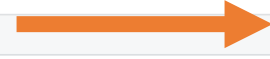
Search  Analyze Process Entry | More options

Source No.	Source Name	Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Customer Code	Revenue Type Code	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)
50270	:	5/1/2023	Sale	Sales Credit...	SCM+105419	AAA-13704		50270	SUBSCRIPTIO...		15	15	0	-37.50	0.00
50270		5/1/2023	Sale	Sales Credit...	SCM+105419	AAA-13173		50270	SUBSCRIPTIO...		47	47	0	-470.00	0.00
50270		5/1/2023	Sale	Sales Credit...	SCM+105419	AAA-10876		50270	SUBSCRIPTIO...		8	8	0	-120.00	0.00
50270		5/1/2023	Sale	Sales Credit...	SCM+105419	AAA-10647		50270	SUBSCRIPTIO...		138	138	0	-945.30	0.00
50270		5/1/2023	Sale	Sales Credit...	SCM+105419	AAA-10647		50270	SUBSCRIPTIO...		108	108	0	-1,350.00	0.00
50132		5/15/2023	Sale	Sales Invoice	INV-10614-B1V4P8	AAA-10647		50132	SUBSCRIPTIO...		-68	-68	0	850.00	0.00
50132		5/15/2023	Sale	Sales Invoice	INV-10614-B1V4P8	AAA-10624		50132	SUBSCRIPTIO...		-20	-20	0	100.00	0.00
50132		5/15/2023	Sale	Sales Invoice	INV-10614-B1V4P8	AAA-06227		50132	SUBSCRIPTIO...		-2	-2	0	40.00	0.00
50406		5/13/2023	Sale	Sales Invoice	INV-10588-F6M2Q4	AAA-06241		50406	SUBSCRIPTIO...		-15	-15	0	63.30	0.00
50703		5/15/2023	Sale	Sales Invoice	INV-10623-J4D3K0	EONE-0008		50703	SUBSCRIPTIO...		-1	-1	0	500.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAD-32951		50266	SUBSCRIPTIO...		-6	-6	0	48.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-25215		50266	SUBSCRIPTIO...		-7	-7	0	210.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-13704		50266	SUBSCRIPTIO...		-3	-3	0	12.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-13173		50266	SUBSCRIPTIO...		-21	-21	0	210.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-11444		50266	SUBSCRIPTIO...		-160	-160	0	960.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-10876		50266	SUBSCRIPTIO...		-10	-10	0	150.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-06232		50266	SUBSCRIPTIO...		-10	-10	0	20.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-06228		50266	SUBSCRIPTIO...		-32	-32	0	128.00	0.00
50266		5/15/2023	Sale	Sales Invoice	INV-10597-D0K0M3	AAA-06227		50266	SUBSCRIPTIO...		-198	-198	0	3,960.00	0.00
50200		5/11/2023	Sale	Sales Invoice	INV-10559-W6P3M5	CSP-0047		50200	AZURE		-1	-1	0	2,772.91	0.00
50647		5/14/2023	Sale	Sales Invoice	INV-10590-C4Y6G8	AAD-11678		50647	ERP SOFTWA...		-31	-31	0	2,170.00	0.00
50647		5/14/2023	Sale	Sales Invoice	INV-10590-C4Y6G8	AAA-25217		50647	SUBSCRIPTIO...		-1	-1	0	55.00	0.00
50647		5/14/2023	Sale	Sales Invoice	INV-10590-C4Y6G8	AAA-25215		50647	SUBSCRIPTIO...		-1	-1	0	30.00	0.00
50647		5/14/2023	Sale	Sales Invoice	INV-10590-C4Y6G8	AAA-13173		50647	SUBSCRIPTIO...		-1	-1	0	10.00	0.00
50647		5/14/2023	Sale	Sales Invoice	INV-10590-C4Y6G8	AAA-10876		50647	SUBSCRIPTIO...		-1	-1	0	15.00	0.00
50647		5/14/2023	Sale	Sales Invoice	INV-10590-C4Y6G8	AAA-06229		50647	SUBSCRIPTIO...		-1	-1	0	8.00	0.00
50647		5/14/2023	Sale	Sales Invoice	INV-10590-C4Y6G8	AAA-06227		50647	SUBSCRIPTIO...		-1	-1	0	20.00	0.00
50210		5/15/2023	Sale	Sales Invoice	INV-10613-V0T5P1	AAA-06227		50210	SUBSCRIPTIO...		-6	-6	0	120.00	0.00



Search  Analyze **Cust Sales Month** +

Customer Code / Item No. ↑	Posting Date Month	Document Type	Sum(Quantity)	Sum(Sales Amount (Actual))
> (Blanks) (540)			1,193.00	0.00
> 50000 (29)			-90.00	897.75
> 50001 (8)			-116.00	481.00
> 50004 (24)			-456.00	15,148.80
> 50005 (1)			-1.00	14,959.52
> 50006 (13)			-91.00	728.00
> 50008 (5)			-9.00	34,569.80
> 50014 (100)			-4,026.00	93,692.93
> 50015 (1)			-1.00	5,703.50
> 50019 (17)			-281.00	19,088.94
> 50020 (18)			-554.00	27,232.69
> 50022 (232)			-5,555.00	396,617.52
> 50024 (5)			-5.00	37,824.75
> 50034 (2)			-2.00	55,864.80
> 50037 (4)			-4.00	27,405.72
> 50038 (4)			-2.00	7,991.20
> 50050 (6)			-6.00	12,349.39
> 50055 (67)			-2,250.00	113,326.35
> 50058 (20)			-155.00	6,719.83
> 50063 (171)			-1,626.00	31,710.67
> 50069 (73)			-127.00	5,944.00
> 50071 (2)			-2.00	6,401.12
> 50073 (48)			-540.00	19,614.00
> 50077 (29)			-123.00	9,413.75
> 50078 (1)			-1.00	44,416.00
> 50079 (92)			-1,720.00	599,739.74
> 50085 (7)			-36.00	4,118.00
> 50088 (174)			-1,983.00	40,262.29
> 50091 (40)			-1,423.00	30,770.72
> 50096 (3)			1.00	15,652.88



Pivot Mode

Search...

Source No.

Source Name

Posting Date

Posting Date Year

Posting Date Quarter

Posting Date Month

Entry Type

Document Type

Document No.

Item No.

Description

Customer Code

Revenue Type Code

Package No.

Location Code

Quantity

Invoiced Quantity

Remaining Quantity

Sales Amount (Actual)

Cost Amount (Actual)

Cost Amount (Non-Invnt)

Open

Order Type

Row Groups

Customer Code ↑ ⊗

Item No. ↑ ⊗

Values

Sum(Quantity) ⊗

Sum(Sales Amount ... ⊗

Item Ledger Entries

Search
Analyze
Cust Sales Month
+

	August		September		October		November		December	
Customer Code / Item No. ↑	um(Sales Amoun...	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)
> (Blanks) (540)	0.00	40.00	0.00	134.00	0.00	54.00	0.00	38.00	0.00	55.00
> 50000 (29)	0.00	-5.00	0.00	-4.00	0.00	-5.00	0.00	-1.00	0.00	-66.00
> 50001 (8)										
> 50004 (24)	1,262.40	-38.00	1,262.40	-38.00	1,262.40	-38.00	1,262.40	-38.00	1,262.40	-38.00
> 50005 (1)										
> 50006 (13)	56.00	-7.00	56.00	-14.00	112.00	-7.00	56.00	-7.00	56.00	-7.00
> 50008 (5)										
> 50014 (100)	2,880.19	-276.00	2,958.91	-283.00	2,914.12	-277.00	2,935.20	-277.00	2,883.67	-280.00
> 50015 (1)						-1.00	5,703.50			
> 50019 (17)	230.00	-23.00	230.00	-23.00	230.00	-23.00	230.00	-28.00	16,558.94	-23.00
> 50020 (18)	1,800.00	-45.00	1,800.00	-45.00	1,800.00	-50.00	7,142.38	-51.00	1,970.31	-48.00
> 50022 (232)	27,659.78	-422.00	18,247.35	-407.00	21,222.45	-417.00	22,206.93	-415.00	17,738.98	-498.00
> 50024 (5)		-2.00	623.41			-3.00	37,201.34			
> 50034 (2)				-2.00	55,864.80					
> 50037 (4)										
> 50038 (4)				-2.00	7,751.20	0.00	240.00			
> 50050 (6)										
> 50055 (67)	9,255.21	-183.00	9,349.34	-213.00	9,542.63	-173.00	11,251.07	-173.00	9,192.14	-173.00
> 50058 (20)	606.40	-17.00	606.40	-17.00	606.40					
> 50063 (171)	2,602.83	-133.00	2,654.44	-161.00	2,931.61	-131.00	2,612.39	-130.00	2,631.16	-128.00
> 50069 (73)	504.50	-11.00	503.50	-11.00	503.50	-11.00	503.50	-11.00	503.50	-11.00
> 50071 (2)										
> 50073 (46)	1,642.00	-45.00	1,642.00	-45.00	1,642.00			-90.00	3,284.00	-45.00
> 50077 (29)	363.20	-10.00	363.20	-10.00	363.20	-10.00	363.20	-10.00	363.20	-10.00
> 50078 (1)										
> 50079 (92)	55,868.30	-143.00	5,462.40	-144.00	100,462.40	0.00	0.00	-286.00	10,924.80	-143.00
> 50085 (7)	480.00	-12.00	480.00							
> 50088 (174)	1,914.31	-158.00	2,435.25	-161.00	1,977.51	-229.00	2,268.85	-196.00	4,370.76	-203.00

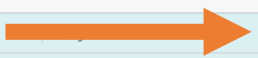
Search...

- > Source No.
- > Source Name
- > Posting Date
- > Posting Date Year
- Equals
  - 2022
- AND
  OR
- Filter...
- > Posting Date Quarter
- > Posting Date Month
- > Entry Type
- > Document Type
- > Document No.
- > Item No.
- > Description
- > Customer Code
- > Revenue Type Code
- > Package No.
- > Location Code
- > Quantity
- > Invoiced Quantity
- > Remaining Quantity
- > Sales Amount (Actual)
- > Cost Amount (Actual)
- > Cost Amount (Non-Invtbl.)
- > Open
- > Order Type
- > Entry No.

Item Ledger Entries

Search Analyze Cust Sales Month +

	January		February		March		April		
Customer Code / Item No. ↑	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)	Sum(Sales Amoun...	Sum(Quantity)
> (Blanks) (540)	43.00	0.00	55.00	0.00	75.00	0.00	120.00	0.00	39.00
> 50000 (29)	-1.00	0.00	-1.00	0.00					
> 50001 (8)	-29.00	120.25	-29.00	120.25	-29.00	120.25	-29.00	120.25	
> 50004 (24)	-38.00	1,262.40	-38.00	1,262.40	-38.00	1,262.40	-38.00	1,262.40	-38.00
> 50005 (1)									
> 50006 (13)	-7.00	56.00	-7.00	56.00	-7.00	56.00	-7.00	56.00	-7.00
> 50008 (5)									-6.00
> 50014 (100)	-640.00	6,896.20	-631.00	6,812.00	-264.00	54,417.52	-273.00	2,568.92	-270.00
> 50015 (1)									
> 50019 (17)	-23.00	230.00	-23.00	230.00	-23.00	230.00	-23.00	230.00	-23.00
> 50020 (18)	-45.00	1,800.00	-45.00	1,800.00	-45.00	1,800.00	-45.00	1,800.00	-45.00
> 50022 (232)	-659.00	43,173.14	-562.00	26,502.94	-405.00	13,735.20	-405.00	13,735.20	-417.00
> 50024 (5)									
> 50034 (2)									
> 50037 (4)	-1.00	17,625.00							
> 50038 (4)									
> 50050 (6)									
> 50055 (67)	-192.00	9,174.86	-192.00	9,141.16	-192.00	8,893.33	-192.00	9,522.39	-192.00
> 50058 (20)	-17.00	606.40	-19.00	1,868.63	-17.00	606.40	-17.00	606.40	-17.00
> 50063 (171)	-132.00	2,603.07	-138.00	2,597.09	-137.00	2,626.62	-135.00	2,656.30	-139.00
> 50069 (73)	-10.00	480.50	-10.00	480.50	-10.00	480.50	-10.00	493.50	-10.00
> 50071 (2)			-2.00	6,401.12					
> 50073 (46)	-45.00	1,600.00	-45.00	1,600.00	-45.00	1,640.00	-45.00	1,640.00	-45.00
> 50077 (29)	-11.00	785.70	-10.00	363.20	-10.00	363.20	-10.00	363.20	-12.00
> 50078 (1)									-1.00
> 50079 (92)	-143.00	5,462.40	-142.00	100,456.00	-144.00	196,982.40	-142.00	12,733.84	-143.00
> 50085 (7)									
> 50088 (174)	-136.00	1,595.81	-140.00	1,622.07	-142.00	1,649.95	-157.00	3,549.91	-156.00



Pivot Mode

Search...

- Source No.
- Source Name
- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Entry Type
- Document Type
- Document No.
- Description
- Revenue Type Code
- Package No.
- Location Code
- Quantity
- Customer Code
- Invoiced Quantity
- Remaining Quantity
- Sales Amount (Actual)
- Item No.

- Row Groups
- Customer Code ↑
  - Item No. ↑

- Values
- Sum(Quantity)
  - Sum(Sales Amount ...)

- Column Labels
- Posting Date Month



# Operations





## Advanced Warehouse Features in Less Complex Locations

- ✓ Zones
- ✓ Bins
- ✓ Calculate Bin Replenishment
- ✓ Bin Capacity Policy
- ✓ Warehouse Class Check
- ✓ Special Equipment



← Location Card

## SILVER · Silver Warehouse

[Online Map](#)
[Resource Locations](#)
[Zones](#)
[Bins](#)
[Invent](#)

**General**

Code ..... SILVER

Name ..... Silver Warehouse

← Location SILVER ✓ Saved

[Bins](#)
[Search](#)
[+ New](#)
[Edit List](#)
[Delete](#)
[Contents](#)
[More options](#)

Zone Code	Code ↑	Bin Ranking	Empty	Dedicated
→ PICK	S-1-01	100	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PICK	S-1-02	100	<input type="checkbox"/>	<input type="checkbox"/>
PICK	S-1-03	100	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PICK	S-1-04	100	<input type="checkbox"/>	<input type="checkbox"/>
PICK	S-1-05	100	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click to go back, hold to see history

Bin Contents: [All](#) | 🔍 Search [🔗](#) [🔍](#) [☰](#) [🔗](#)

Location Code ↑	Bin Code ↑	Item No. ↑	Default	Fixed	Dedicated	Bin Ranking	Min. Qty.	Quantity	Max. Qty.	Unit of Measure Code ↑	Quantity (Base)
SILVER	S-1-02	WRB-1000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100	10	5	50	PCS	5
SILVER	S-1-03	WRB-1001	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	100	0	0	0	PCS	0
SILVER	S-1-04	WRB-1001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	100	0	10	0	PCS	10
SILVER	S-4-01	WRB-1000	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	20	0	100	0	PCS	100

Require Pick

**Bins** >

**Bin Policies** >

BULK	S-4-02	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BULK	S-4-03	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BULK	S-4-04	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BULK	S-4-05	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BULK	S-4-06	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BULK	S-4-07	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BULK	S-4-08	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
BULK	S-4-09	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	S-4-10	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

CC - Jim | Sales & Purchases | Reference Data

Transfer Orders | Released Production Orders | Assemblies

Headline

# Good evening, Jim Augenstein!

### Activities

Outbound - Today

Released Sales... Until Today

0

Posted Sales S... - Today

0

Expected Purc... Until Today

0

Inbound - Today

### Activities

Outbound - Today

Released Sales... - Today

0

Shipments - Today

0

Picked Shipme... - Today

0

Internal

Picks - All

0

Unassigned Picks

0

Put-aways - All

0

### Movement Worksheets

Name: SILVER

Location Code: SILVER

Sorting Method: [Dropdown]

Manage Home Line Item More options

- Create Movement...
- Get Bin Content...
- Calculate Bin Replenishment...
- Autofill Qty. to Handle

Calculate the movement of items from bulk storage bins with lower bin rankings to bins with a high bin ranking in the picking areas.

Item No.	Description	From Zone Code	From Bin Code	To Zone Code	To Bin Code	Quantity	Out
[Dropdown]						0	

Item Description

CC - Jim | Sales & Purchases | Reference Data

Transfer Orders | Released Production Orders | Assemblies

Headline

Good evening, Jim Augenstein!

Activities

Outbound - Today

Released Sales... Until Today	Posted Sales S... - Today
0	0

Inbound - Today

Expected Purc... Until Today
0

Activities

Outbound - Today

Released Sales... - Today	Shipments - Today	Picked Shipme... - Today
0	0	0

Internal

Picks - All	Unassigned Picks	Put-aways - All
0	0	0

Movement Worksheets

Name: SILVER

Location Code: ...

Sorting Method: ...

Manage: Home

Create Movement Worksheet

Item No.	Quantity	Out
	0	

Item Description

### Calculate Bin Replenishment

Use default values from: Last used options and filters

**Options**

Worksheet Template Name: MOVEMENT

Worksheet Name: SILVER

Location Code: SILVER

Allow Breakbulk:

Do Not Fill Qty. to Handle:

**Filter: Bin Content**

× Bin Code: [ ]

× Item No.: [ ]

+ Filter...

Filter totals by:

+ Filter...

Schedule... OK Cancel

CC - Jim | Sales & Purchases | Reference Data

Transfer Orders | Released Production Orders | Asses

Headline

# Good evening, Jim Augenstein!

● ○

### Activities

Outbound - Today

Released Sales... Until Today

0

>

Posted Sales S... - Today

0

>

Inbound - Today

Expected Purc... Until Today

0

>

### Activities

Outbound - Today

Released Sales... - Today

0

>

Shipments - Today

0

>

Picked Shipme... - Today

0

>

Internal

Picks - All

0

>

Unassigned Picks

0

>

Put-aways - All

0

>

← Movement Worksheets

Name: SILVER

Location Code: SILVER

Sorting Method: [Dropdown]

Manage Home Line Item More options

Create Movement... Get Bin Content... Calculate Bin Replenishment... Autofill Qty. to Handle

Item No.	Description	From Zone Code	From Bin Code	To Zone Code	To Bin Code	Quantity	Out
WRB-1000	Whole Roasted Beans, Columbia	BULK	S-4-01	PICK	S-1-02	45	
						0	

- Physical Inventory Recordings
- Movement Worksheet
- Order Planning
- Requisition Worksheet
- Planning Worksheets
- Search in data...
- Credit Management
- Order Status
- Sales Order Shipping
- Warehouse Bin List
- Physical Inventory List
- Customer Labels

# Warehouse Honorable Mentions



# Auto-release Documents

Sales Order



✓ Saved

## S-ORD101004 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Report Actions Related Automate Fewer options

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

### General

Create a warehouse shipment to start a pick a ship process according to an advanced warehouse configuration.

Show more

Customer Name	Adatum Corporation	Order Date	4/4/2023	External Document No.	W-1
Contact		Due Date	6/1/2022	Status	Open
Posting Date	6/1/2022	Requested Delivery Date			

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Bin Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Line Discount %	Line Amount Excl. Tax	Amount Including Tax	Qty. to Sh
Item	WRB-1000	Whole Roasted Beans, Columbia	WHITE	2			-	PCS	15.00		*		30.00	30.00	
Item	WRB-1001	Whole Roasted Beans, Brazil	WHITE	2			-	PCS	15.00		*		30.00	30.00	

Subtotal Excl. Tax (USD)	60.00	Invoice Discount %	0	Total Tax (USD)	0.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Excl. Tax (USD)	60.00	Total Incl. Tax (USD)	60.00

### Invoice Details

Show more

Currency Code		Tax Liable	<input checked="" type="checkbox"/>	Shortcut Dimension 1 Code	
Company Bank Account Code		Tax Area Code		Shortcut Dimension 2 Code	
VAT Bus. Posting Group		Payment Service	No payment service is made available.	Payment Discount %	0
Payment Terms Code				Direct Debit Mandate ID	





Sales Order



✓ Saved

# S-ORD101004 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Report Actions Related Automate Fewer options

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

## General

Show more

Customer Name: Adatum Corporation    Order Date: 4/4/2023    External Document No.: W-1

Contact:    Due Date: 6/1/2022    Status: **Open**

Posting Date: 6/1/2022    Requested Delivery Date:

## Lines

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	Bin Code	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax C
Item	WRB-1000	Whole Roasted Beans, Columbia	WHITE	2			-	PCS	15.00		*
Item	WRB-1001	Whole Roasted Beans, Brazil	WHITE	2			-	PCS	15.00		*

Subtotal Excl. Tax (USD): 60.00    Invoice Discount %: 0    Total Tax (USD): 0.00

Inv. Discount Amount Ex...: 0.00    Total Excl. Tax (USD): 60.00    Total Incl. Tax (USD): 60.00

## Invoice Details

Show more

Currency Code:    Tax Liab:     Shortcut Dimension 1 Co...:

Company Bank Account ...:    Tax Area Code:    Shortcut Dimension 2 Co...:

VAT Bus. Posting Group:    Payment Service: No payment service is made available.    Payment Discount %: 0

Payment Terms Code:    Direct Debit Mandate ID:

## Shipping and Billing

Show less

Details Attachments (0)

## Sell-to Customer Sales History

Customer No. 10000

0	0	5	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	Ongoing Sales Invoices
0	0	0	0
Ongoing Sales Return Orders	Ongoing Sales Credit Memos	Posted Sales Shipments	Posted Sales Invoices
0	0	0	0
Posted Sales Return Receipts	Posted Sales Credit Memos	GP Sales transactions	GP Receivables transactions

## Customer Details

Customer No. 10000

Name: Adatum Corporation

Phone No.

Email

Fax No.

Credit Limit (\$) 0.00

Available Credit (\$) 0.00

Payment Terms Code

Contact

## Sales Line Details

Item No. WRB-1000

Required Quantity 2

## Attachments

Documents

# Improved Bin Contents

Bin Contents | Work Date: 7/1/2021

Options Location Filter: WHITE Zone Filter

Manage You can drop an action here More options

- Define Bin Content

- Set Default or Fixed Bins

- Select UOM

- Update Min / Max

Bin Code ↑	Item No. ↑	Unit of Measure Code	Warehouse	Class Code	Bin Type Code	Ranking	Block Move	Min. Qty.	Max. Qty.	Quantity (Base)	Pick Qty. (Base)	Collected Qty. (Base)	Negative Adjmt. (Base)	Put-away Quantity (Base)	Positi... Adjmt. Qty. (Base)	Avail... Qty. to Take	Fixed	Cro... Dock Bin	Replenishment Rule
→ W-00-0000	LS-100	PCS			PUTPICK	100		0	0	0	0	0	0	0	0	0	<input type="checkbox"/>	<input type="checkbox"/>	
W-00-0000	LS-10PC	BOX			PUTPICK	100		0	0	0	0	0	0	0	0	0	<input type="checkbox"/>	<input type="checkbox"/>	
W-01-0001	LS-75	PCS			PUTPICK	100		12	40	0	0	0	0	0	0	0	<input type="checkbox"/>	<input type="checkbox"/>	
W-01-0002	LS-75	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		2	8	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-01-0003	LS-10PC	BOX	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		00	400	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-02-0001	LS-100	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	100		10	50	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-02-0002	LS-120	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		6	10	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-02-0003	LS-150	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		0	0	0	0	0	0	0	0	0	<input type="checkbox"/>	<input type="checkbox"/>	
W-02-0003	LS-S15	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		10	50	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-03-0001	1928-W	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	100		0	0	20	20	0	0	0	0	20	<input type="checkbox"/>	<input type="checkbox"/>	
W-03-0001	70200	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	100		0	0	1,000	1,000	0	0	0	0	1,000	<input type="checkbox"/>	<input type="checkbox"/>	
W-03-0001	LS-150	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	100		10	20	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-03-0002	1952-W	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		0	0	50	50	0	0	0	0	50	<input type="checkbox"/>	<input type="checkbox"/>	
W-03-0002	LS-150	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		2	6	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-03-0003	LOTALLWHSE	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		0	0	39	39	0	0	0	0	39	<input type="checkbox"/>	<input type="checkbox"/>	
W-03-0003	LS-2	BOX	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	90		20	200	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
W-04-0001	LOTALLWHSE	PCS	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	100		0	0	33	33	0	0	0	0	33	<input type="checkbox"/>	<input type="checkbox"/>	
W-04-0001	LS-10PC	BOX	<input type="checkbox"/>	<input type="checkbox"/>	PUTPICK	100		10	40	0	0	0	0	0	0	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Open details for "Put-away Quantity (Base)" "0"

Add Field to Page

Place fields by dragging from the list to a position on the page.

- Code Location Code Ready
- Code Zone Code Ready
- Code Variant Code Ready
- Decimal Qty. per Unit of Measure Ready

# Item Tracking Warehouse Enable

Item Tracking Code Card

Search +

Code ↑

- LOTALLEXP
- SN-PROD
- NEW

Rel - To

## NEW

✓ Saved

---

### General

Code ..... NEW      Description .....

---

### Serial No. >

---

### Lot No.

<b>General</b>	Lot Warehouse Tracki... <input checked="" type="checkbox"/>
Lot Specific Tracking ... <input checked="" type="checkbox"/>	Lot Transfer Tracking ... <input checked="" type="checkbox"/>
Create Lot No. Info. o... <input type="checkbox"/>	<b>Outbound</b>
<b>Inbound</b>	Lot No. Info. Must Exist · <input type="checkbox"/>
Lot No. Info. Must Exist · <input type="checkbox"/>	Lot Purchase Tracking · <input checked="" type="checkbox"/>
Lot Purchase Tracking · <input checked="" type="checkbox"/>	Lot Sales Tracking · <input checked="" type="checkbox"/>
Lot Sales Tracking · <input checked="" type="checkbox"/>	Lot Positive Adjmt. Tr... <input checked="" type="checkbox"/>
Lot Positive Adjmt. Tr... <input checked="" type="checkbox"/>	Lot Negative Adjmt. T... <input checked="" type="checkbox"/>
Lot Negative Adjmt. T... <input checked="" type="checkbox"/>	Lot Assembly Tracking · <input checked="" type="checkbox"/>
Lot Assembly Tracking · <input checked="" type="checkbox"/>	Lot Manufacturing Tr... <input checked="" type="checkbox"/>
Lot Manufacturing Tr... <input checked="" type="checkbox"/>	

Search in data...

- Credit Management
- Order Status
- Sales Order Shipping
- Warehouse Bin List
- Physical Inventory List
- Customer Labels

# User Experience Round UP!

New Usability Features in 2023 Wave 1



# Personalize: All Table Fields Available!

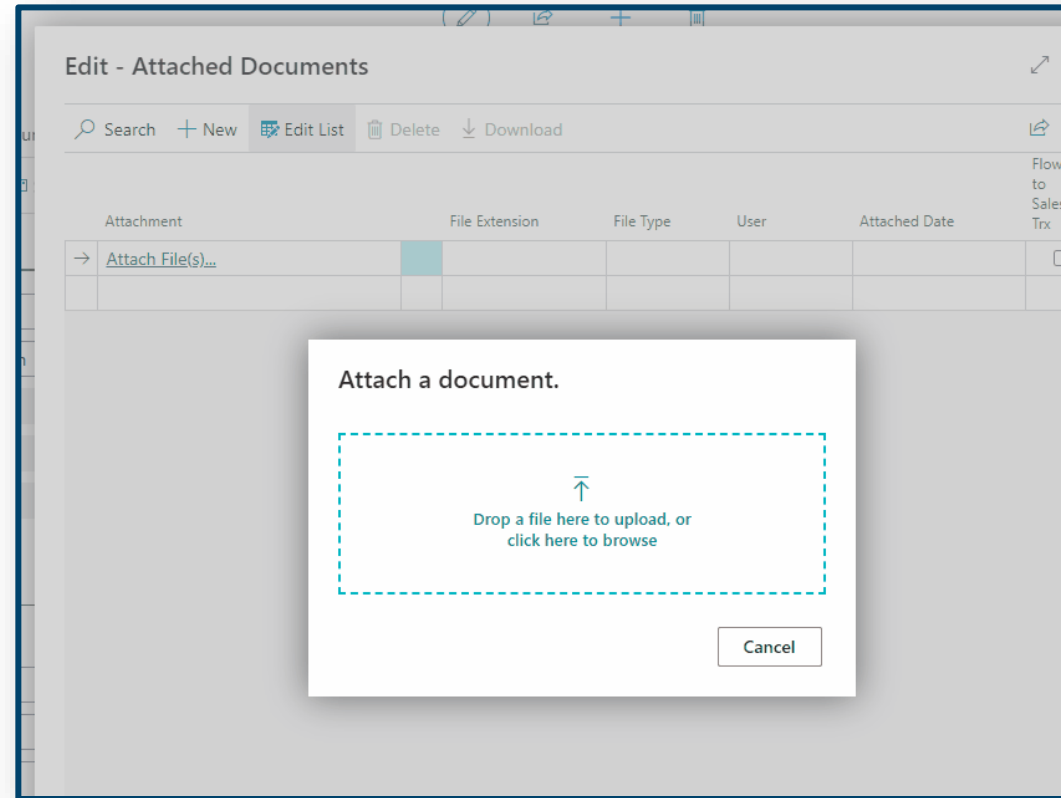
The screenshot shows the Dynamics 365 Business Central interface. At the top, the 'Personalising: Items' tab is active, with a '+ Field' button highlighted. Below this, the 'Contoso Coffee' workspace is visible, showing a table of items. The table has columns for 'No.', 'Description', 'Type', and 'Inventory'. The 'Inventory' column is highlighted, and a '+ Add Gross Weight' button is overlaid on it. To the right, the 'Add Field to Page' panel is open, showing a search bar for 'Weight' and two options: 'Decimal Gross Weight' and 'Decimal Net Weight', both with 'Drag to add' instructions.

No.	Description	Type	Inventory
1000	Contoso Loyalty Membership	Inventory	998
1001	Coffee (XL bag)	Inventory	100
1896-S	ATHENS Desk	Inventory	
1900-S	PARIS Guest Chair, black	Inventory	0
1906-S	ATHENS Mobile Pedestal	Inventory	5
1908-S	LONDON Swivel Chair, blue	Inventory	3
1920-S	ANTWERP Conference Table	Inventory	10
1925-W	Conference Bundle 1-6	Inventory	0
1928-S	AMSTERDAM Lamp	Inventory	8
1929-W	Conference Bundle 1-8	Inventory	0
1936-S	BERLIN Guest Chair, yellow	Inventory	100
1953-W	Guest Section 1	Inventory	-49

Unlocking all table fields via Personalization and Designer so they can be added to pages in their personalized workspace or by role.

# Drag & Drop To Upload Dialog

The file upload dialog in Business Central has been enhanced with a clear drop area where users can drag and drop a single file.



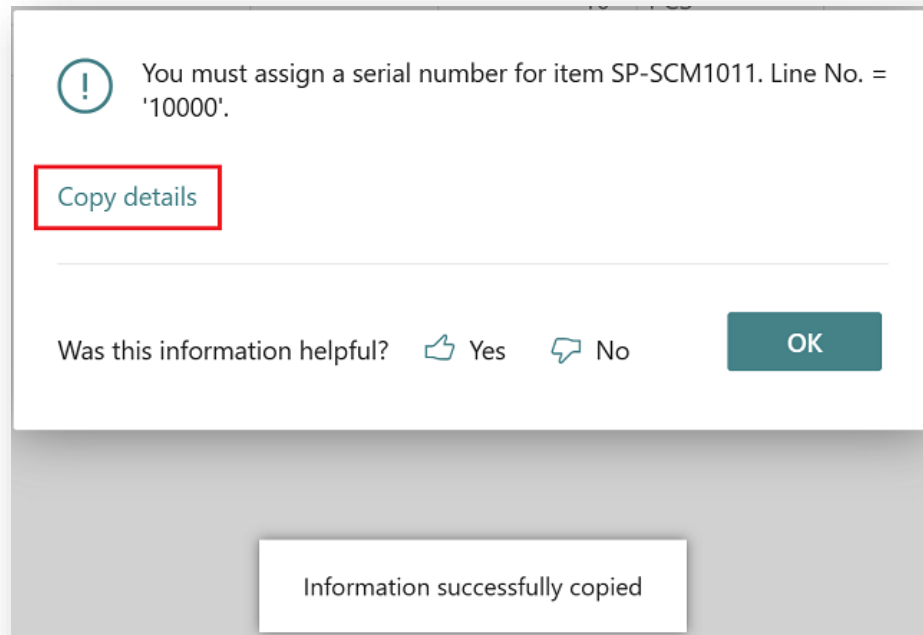
# Key tips in Business Central Web Client

The screenshot shows the 'Customer Card' for '10000 · Adatum Corporation'. The interface includes a navigation bar with options like 'Home', 'Request Approval', and 'New Document'. Below the navigation bar, there are action buttons: 'Contact', 'Apply Template', 'Merge With...', and 'Send Email'. The main content area is divided into sections: 'General', 'Address & Contact', and 'Attachments'. The 'General' section contains fields for 'No.' (10000), 'Name' (Adatum Corporation), 'Balance (\$)', 'Balance (\$ As Vendor)', 'Balance Due (\$)', 'Credit Limit (\$)', 'Blocked' (Ship), 'Total Sales' (223,598.40), and 'Costs (\$)' (40,255.70). The 'Address & Contact' section includes fields for 'Address' (192 Market Square), 'Address 2', 'Country/Region Code' (US), 'City' (Atlanta), 'State' (GA), 'ZIP Code' (31772), 'Phone No.', 'Mobile Phone No.', 'Email' (robert.townes@contoso.com), 'Home Page', and 'Contact Name' (Robert Townes). A 'Show on Map' button is located at the bottom left of the address section. The right sidebar contains sections for 'Details', 'Attachments', 'Links', and 'Notes'.

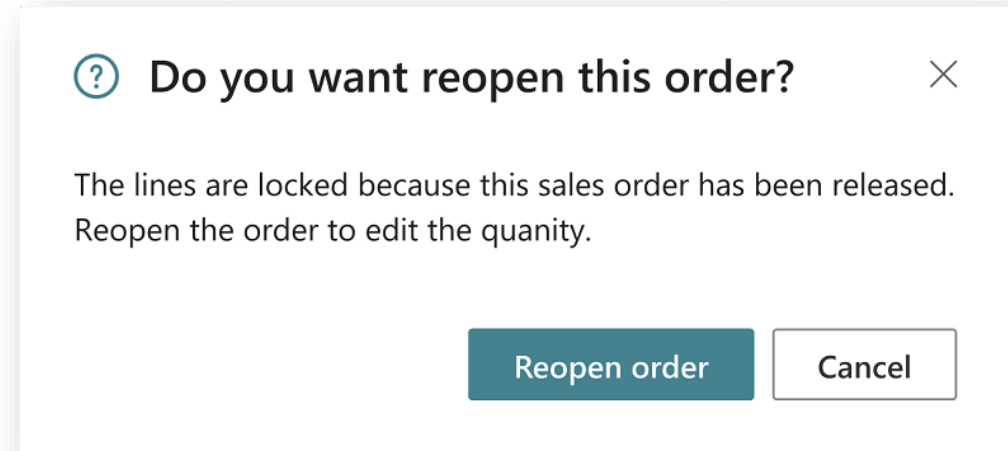
**Key tips** are revealed alongside the UI that can be used to navigate the User Interface utilizing your keyboard.



# Actionable Error Messages



Reduced clutter by adding "Copy Details"



Addition of actions within an error.



# Power Platform Updates

Adapt Faster with Business Central & the Power Platform











# More Power Automate Templates!

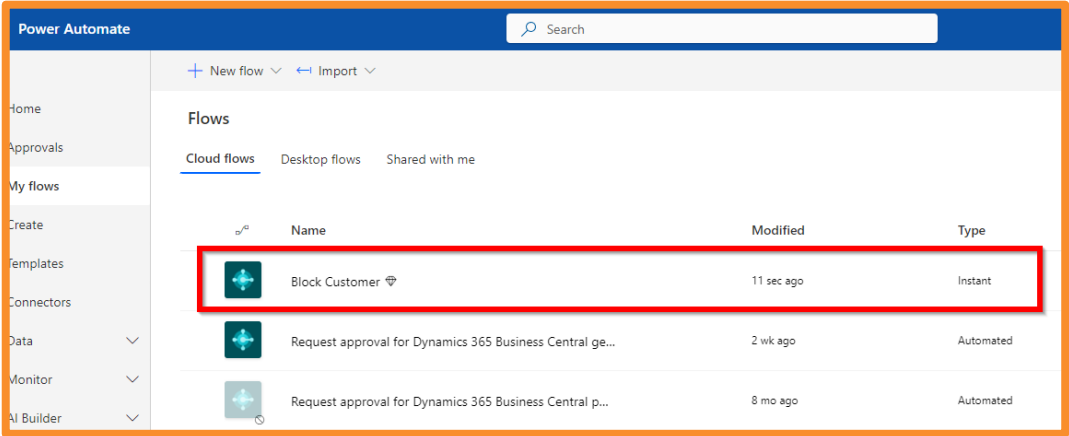
Business Central

Sorted by popularity

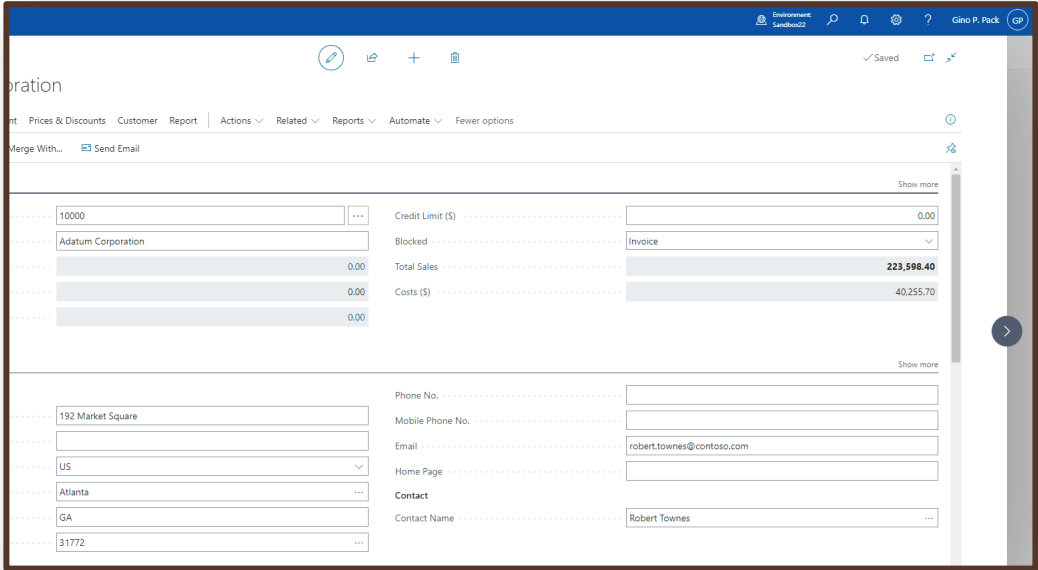
All templates Top picks Shared with me Remote work Approval Button Visio Data collection Email Calendar Mobile Notifications Productivity ...

 <b>Request approval for Dynamics 365 Business Central purchase order</b> By Microsoft Automated 313	 <b>Create an item in SharePoint when a record is created in Business Central</b> By Microsoft Flow Community Automated 272	 <b>Request approval for Dynamics 365 Business Central sales order</b> By Microsoft Automated 234	 <b>Block the selected customer in Dynamics 365 Business Central</b> By Microsoft Instant 208
 <b>Request approval for Dynamics 365 Business Central purchase invoice</b> By Microsoft Automated 144	 <b>Notify Business Central when an account changes</b> By Microsoft Power Automate Community Automated 99	 <b>Request approval for Dynamics 365 Business Central general journal batches</b> By Microsoft Automated 82	 <b>Request approval for Dynamics 365 Business Central sales invoice</b> By Microsoft Automated 79

# Embedded Flows in BC



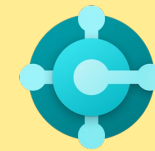
Create your flow in Power Automate



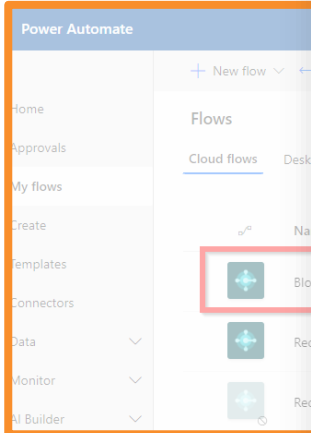
Run your flow within Business Central

# Demo

Embedded Flows in Business Central



# Embedded Flows in BC



Customer blocked: Adatum Corporation

 Gino P. Pack <gino@genesis.support>  
To  Gino Pack

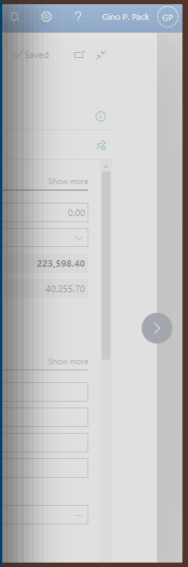
 This sender gino@genesis.support is from outside your organization.  
 This message was sent with High importance.

[gino@genesis.support](#) appears similar to someone who previously sent you email, but may not be that person. [Learn why this could be a risk](#)

**The following customer has been blocked:**

**Name:** Adatum Corporation  
**Number:** 10000  
**Address:** Atlanta, US  
**Blocked Status:** Ship  
**Reason:** No Ship until Invoices are paid.

I

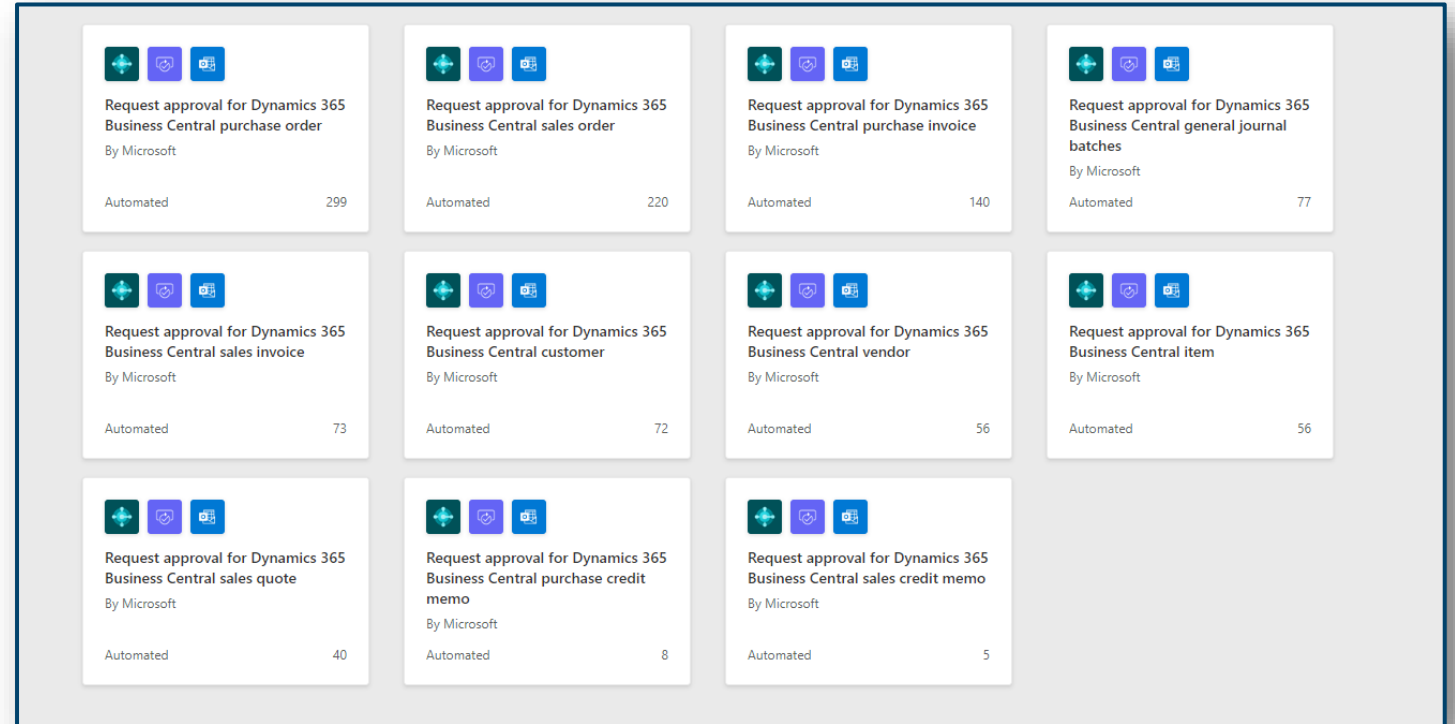


Enable notifications via e-mail



# Enhancements to Approvals

- ✓ Define workflows tied to a selected Business Central environment and company.
- ✓ Approve documents using mobile devices.
- ✓ Approve documents using Microsoft Teams.
- ✓ Support a chain of approvers and additional input.



# Power Platform Notable Mentions

- ✓ Power Apps and Power Automate support for document attachments
- ✓ Media/image support for Business Central connectors
- ✓ Use business events to notify and trigger external systems



# Any Questions?





# Thanks for Joining Us



Please Use the Code to Access Your Survey

