

Dynamics365 Business Central
Customization and Consulting



Microsoft Dynamics 365
Business Central

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DYNAMICS 365

Microsoft Dynamics 365 is a cloud-based business applications platform that combines components of customer relationship management (CRM) and enterprise resource planning (ERP), along with productivity applications and artificial intelligence tools.

DYNAMICS 365 ONLINE VS ON-PREMISES

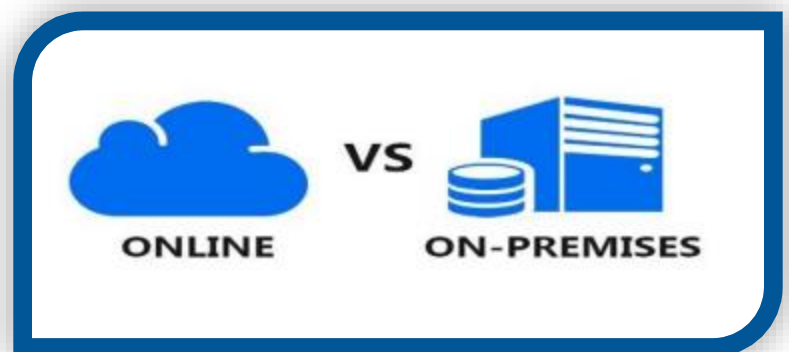
There are several significant differences between Microsoft Dynamics CRM 365 on-premises vs online. Each model should be carefully examined in deciding the best model for business. Microsoft CRM on-premises was released in 2003 and went through several versions (1.2, 4, 2011) before the online model was released in the 2013 version.

Online

The online version is a true cloud/Software as a Service (SaaS) application. SaaS applications are essentially rental models; monthly fee is paid to use the application. This makes the online version an opex or operating expense vs a capex or capital expense. No hardware or supporting software needed – Microsoft Dynamics CRM and 365 Online require no infrastructure hardware or software, users simply run the application through a browser, the Outlook application or mobile application.

On-Premises

Microsoft Dynamics CRM & 365 On-Premises gets installed on servers either in data center or at a hosting partner. The on-premises version is a capex or capital expense; need to pay for the licensing upfront (or over 3 years via the interest free spread pay option Microsoft offers). The hardware and infrastructure related costs are also capex. The on-premises model requires Microsoft SQL server, Windows Server, Internet Information Services, and additional supporting requirements.



DYNAMICS 365 MODULES/APPS

Sales	Customer Service
Field Service	Talent / Human Resources
Finance	Supply Chain Management
Retail / Commerce	Project Operations
Marketing	Customer Data Platform
Artificial Intelligence	Mixed Reality
Business Central	

Dynamics 365 offers users several modules they can choose from to build a system that fits their unique needs. Each module/app ring-fences an area of CRM or ERP functionality and can be used in conjunction with a wider package of apps, or on its own. Organizations can choose from the following Microsoft Dynamics 365 applications and features:

Dynamics 365 Modules / Apps

DYNAMIC365 BUSINESS CENTRAL

Business Central is a business management solution that are used to help you to manage your Business, streamline Business process and automate them. It's Ensure business continuity with a cloud solution that connects sales, service, finance, and operations teams to help them adapt faster and deliver results. Business Central Manage their Business including different departments including finance, manufacturing, sales, shipping, project management, services, and Warehouse etc.

Helping organizations streamline their processes, improve customer relations, and enable growth through:

- **Business without silos** – connecting businesses and boosting efficiency with automated tasks and workflows, all within the familiar Microsoft interface of applications such as Word, Outlook and Excel.
- **Actionable insights** – achieving more and gaining a complete view of the business with connected data, business analytics and guidance delivered by Microsoft's leading intelligent technologies.
- **Solutions built to evolve** – get started quickly, growing and adapting in real time with a flexible platform that makes it easy to extend beyond Business Central based on evolving business needs.



DYNAMIC365 BUSINESS CENTRAL PRICING

Dynamics 365 Business Central pricing

	Team Member	Read and Approve Run all reports Employee Self Serve		\$8	
	Essentials	Invoicing Purchasing Opportunity Management Budgets Finance Fixed Assets	Purchasing Order Management Resource Management Workflow Contact Management Simple Inventory	Advanced Sales Advanced Inventory Distribution Warehouse management Project management	\$70
	Premium	Service Management Manufacturing			\$100

Available in Cloud Solution Provider (CSP)

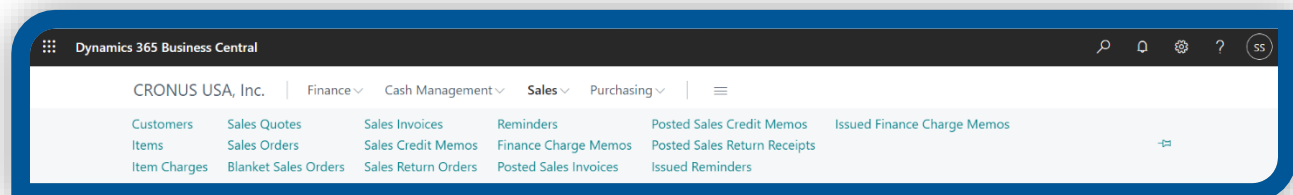
Includes cloud platform, Microsoft PowerApps and Microsoft Flow

Partners can determine end-customer pricing

*All pricing subject to change. Please consult price list for actual pricing

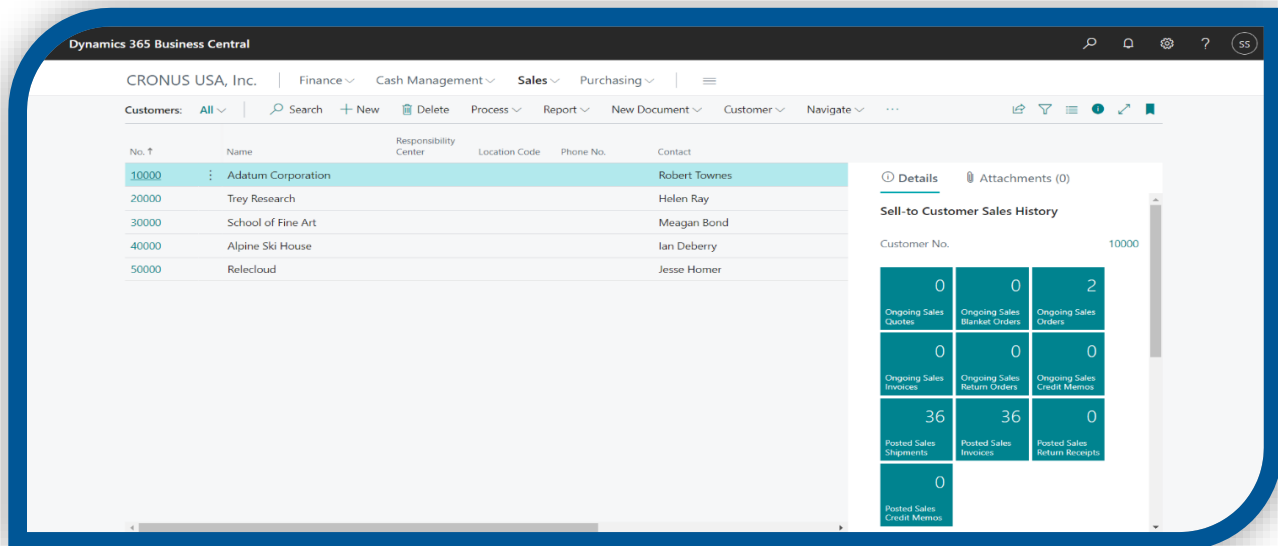
SALES

In Sales you can create sales quotes, sales order, sales invoices and posted sales invoices etc. You can negotiate with the customer by first creating a sales quote, which you can convert to a sales invoice or sales order when you agree on the sale. After the customer has confirmed the agreement, you can send an order confirmation to record your obligation to deliver the products as agreed. You can easily correct or cancel a posted sales invoice before it is paid. This is useful if you want to correct a typing mistake or if the customer requests a change early in the order process. If the posted sales invoice is paid, then you must create a sales credit memo or a sales return order to reverse the sale.



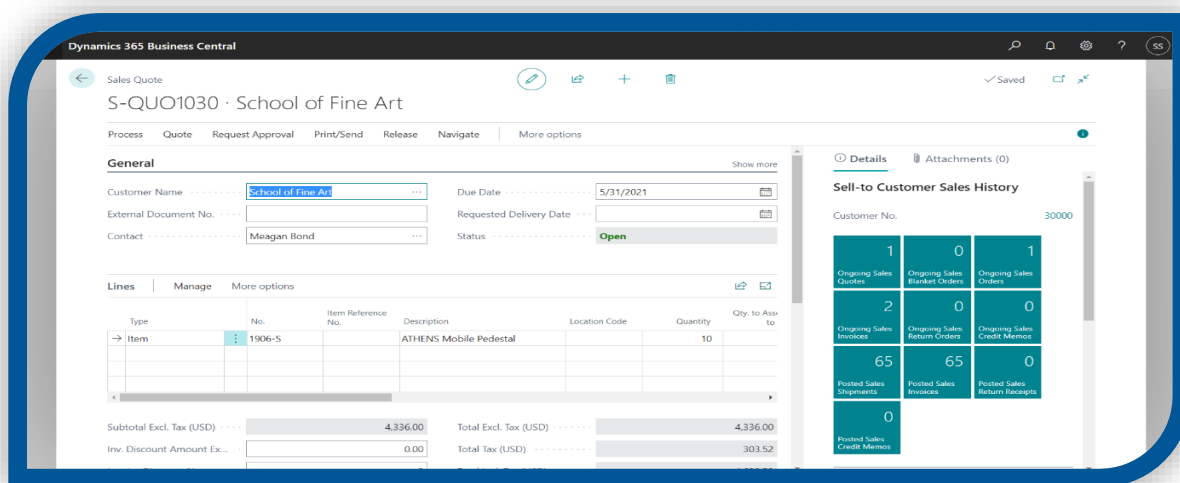
Customers

You can add new customers manually, by filling out the fields on the **Customer Card** page, or you can use templates that contain predefined information. For example, you can create a template for different types of customer profiles. Using templates saves time when adding new customers and helps ensure that the information is correct each time. If you create templates for more than one type of customer, you can choose the template to use when you add a customer. Business Central is a trusted, proven ERP solution which has served **160,000 customers** and is enhanced by Microsoft every year.



Sales Quotes

You make a sales quote to record your offer to sell particular items to a client or prospect on certain delivery and payment conditions. To explain the offer, you might email the sales quote to the customer. The Document may be emailed as a PDF attachment.



Sales Orders

If you sell items by delivering directly from your vendor to your customer, as a drop shipment, then you must also use sales orders. For more information, see [Make Drop Shipments](#). In all other aspects, sales orders work the same way as sales invoices. For more information, see [Invoice Sales](#). When you deliver the products, either fully or partially, you post the sales order as shipped or as shipped and invoiced to create the related item and customer ledger entries in your system. When you post the sales order, you can also email the document as a PDF attachment. You can have the email body prefilled with a summary of the order and payment information, such as a link to PayPal.

The screenshot shows the Dynamics 365 Business Central interface for a Sales Order. The header includes the title "Sales Order" and the specific order number "S-ORD101032" for "School of Fine Art". The top navigation bar contains tabs for Process, Report, Release, Posting, Prepare, Order, Request Approval, Print/Send, Navigate, Actions, Related, Reports, and Fewer options. The "General" section on the left contains fields for Customer Name (School of Fine Art), Quote No. (S-QU01030), Contact (Meagan Bond), Posting Date (5/13/2021), and Order Date (5/13/2021). The "Lines" section in the center shows a table with columns for Type, No., Item Reference No., Description, Location Code, Quantity, and Qty. to Ass. to. A single line is visible for item 1906-S, "ATHENS Mobile Pedestal", with a quantity of 10. The bottom summary bar shows a Subtotal Excl. Tax (USD) of 4,336.00 and a Total Excl. Tax (USD) of 4,336.00. On the right, the "Details" pane shows "Sell-to Customer Sales History" with a Customer No. of 30000 and a grid of sales history data.

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Ass. to
Item	1906-S		ATHENS Mobile Pedestal		10	

Posted Sales Invoices

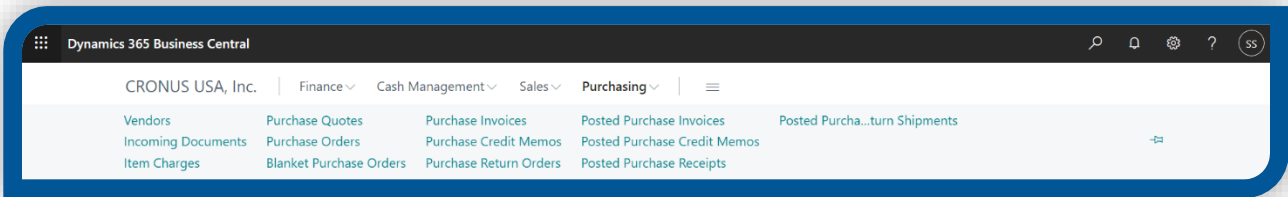
If the customer decides to buy, you post the sales invoice to create the related quantity and value entries. When you post the sales invoice, you can also email the document as a PDF attachment. You can have the email body prefilled with a summary of the invoice and payment information, such as a link to PayPal.

The screenshot shows the Dynamics 365 Business Central interface for a Posted Sales Invoice. The header includes the title "Posted Sales Invoice" and the specific invoice number "PS-INV103246" for "School of Fine Art". The top navigation bar contains tabs for Process, Invoice, Correct, Print/Send, Navigate, Electronic Document, Actions, Related, and Fewer options. The "General" section on the left contains fields for No. (PS-INV103246), Customer (School of Fine Art), Contact (Meagan Bond), Posting Date (5/13/2021), and Due Date (5/31/2021). The "Lines" section in the center shows a table with columns for Type, No., Item Reference No., Description, Quantity, and Unit of Measure Code. A single line is visible for item 1906-S, "ATHENS Mobile Pedestal", with a quantity of 10 and a unit of measure of PCS. The bottom summary bar shows an Invoice Discount Amount of 0.00 and a Total Tax (USD) of 303.52. On the right, the "Details" pane shows "Incoming Document Files" with a table for Name and Type, which is currently empty.

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code
Item	1906-S		ATHENS Mobile Pedestal	10	PCS

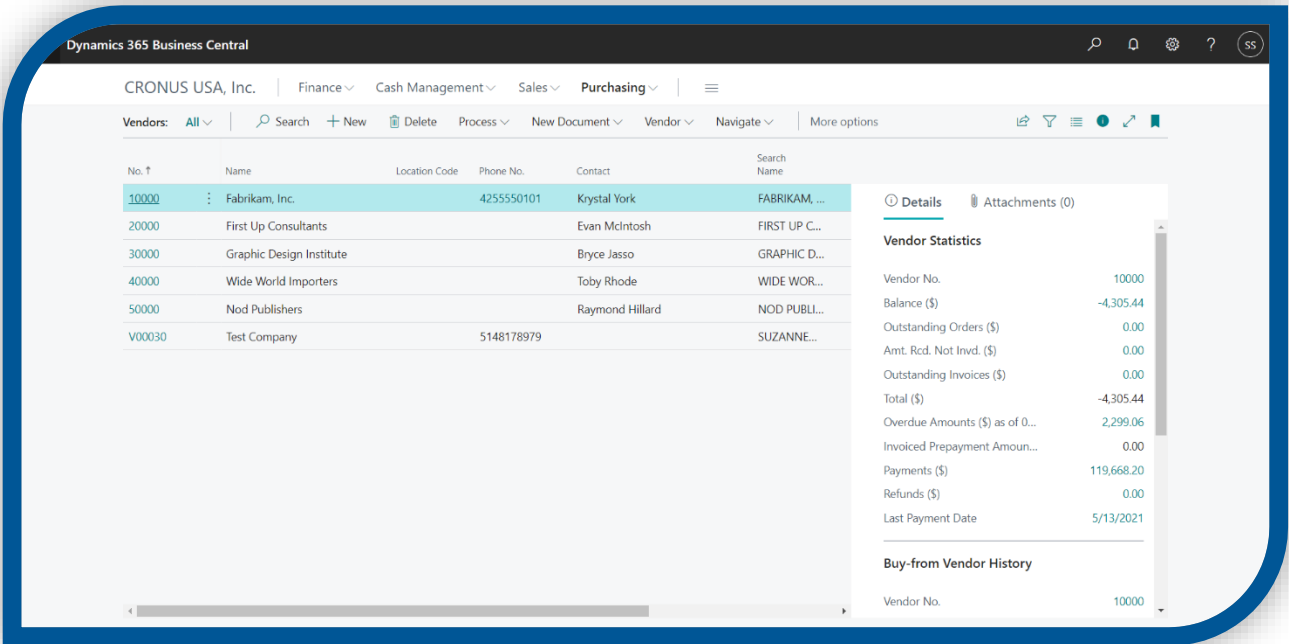
PURCHASING

You create a purchase invoice or purchase order to record the cost of purchases and to track accounts payable. If you need to control an inventory, purchase invoices are also used to dynamically update inventory levels so that you can minimize your inventory costs and provide better customer service. The purchasing costs, including service expenses, and inventory values that result from posting purchase invoices contribute to profit figures and other financial KPIs on your Role Center.



Vendors

Vendors provide the products that you sell. Each vendor that you purchase from must be registered as a vendor card. Vendor cards hold the information that is required to buy products from the vendor.



Purchase Quotes

A purchase quote can be used as a preliminary draft for a purchase order, and the order can then be converted to a purchase invoice or an order.

The screenshot shows the 'Purchase Quote' form in Dynamics 365 Business Central. The form is titled '1018 · First Up Consultants'. The 'General' tab is active, showing fields for Vendor Name (First Up Consultants), Contact (Evan McIntosh), Document Date (5/13/2021), Order Date (5/13/2021), Requested Receipt Date, Vendor Shipment No., and Status (Open). The 'Lines' section shows a table with columns: Type, No., Item Reference No., Description, Location Code, Quantity, and Unit of Measure. The table contains one line item: 'Conference Bundle 1-8' with quantity 10 and unit PCS. The 'Subtotal Excl. Tax (USD)' is 7,680.00, 'Total Excl. Tax (USD)' is 7,680.00, 'Inv. Discount Amount (USD)' is 0.00, and 'Total Tax (USD)' is 460.80. The 'Vendor Statistics' section on the right shows various financial metrics for Vendor No. 20000, including Balance (\$), Outstanding Orders (\$), Amt. Rcd. Not Invd. (\$), Outstanding Invoices (\$), Total (\$), Overdue Amounts (\$), Invoiced Prepayment Amount (\$), Payments (\$), Refunds (\$), and Last Payment Date (5/13/2021). The 'Buy-from Vendor History' section shows Vendor No. 20000.

Type	No.	Item Reference No.	Description	Location Code	Quantity	Unit of Measure
→ Item	1929-W		Conference Bundle 1-8		10	PCS

Field	Value
Subtotal Excl. Tax (USD)	7,680.00
Total Excl. Tax (USD)	7,680.00
Inv. Discount Amount (USD)	0.00
Total Tax (USD)	460.80

Field	Value
Vendor No.	20000
Balance (\$)	4,089.30
Outstanding Orders (\$)	1,464.81
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	1,911.82
Total (\$)	7,465.93
Overdue Amounts (\$) as of 0...	4,903.88
Invoiced Prepayment Amount (\$)	0.00
Payments (\$)	62,209.96
Refunds (\$)	0.00
Last Payment Date	5/13/2021

Purchase Order

When you want to purchase items, you will start the purchase process with a purchase order and will receive items resulting in a posted receipt that will update the inventory for the purchased item. You will also receive the invoice from the vendor.

The screenshot shows the 'Purchase Order' form in Dynamics 365 Business Central. The form is titled '106025 · First Up Consultants'. The 'General' tab is active, showing fields for Vendor Name (First Up Consultants), Contact (Evan McIntosh), Document Date (5/13/2021), Vendor Invoice No. (INV-106025), Vendor Shipment No., and Status (Open). The 'Lines' section shows a table with columns: Type, No., Item Reference No., Description, Location Code, Bin Code, and Quantity. The table contains one line item: 'Conference Bundle 1-8' with quantity 10 and unit PCS. The 'Subtotal Excl. Tax (USD)' is 7,680.00, 'Total Excl. Tax (USD)' is 7,680.00, 'Inv. Discount Amount (USD)' is 0.00, and 'Total Tax (USD)' is 460.80. The 'Vendor Statistics' section on the right shows various financial metrics for Vendor No. 20000, including Balance (\$), Outstanding Orders (\$), Amt. Rcd. Not Invd. (\$), Outstanding Invoices (\$), Total (\$), Overdue Amounts (\$), Invoiced Prepayment Amount (\$), Payments (\$), Refunds (\$), and Last Payment Date (5/13/2021). The 'Buy-from Vendor History' section shows Vendor No. 20000.

Type	No.	Item Reference No.	Description	Location Code	Bin Code	Quantity
→ Item	1929-W		Conference Bundle 1-8			10

Field	Value
Subtotal Excl. Tax (USD)	7,680.00
Total Excl. Tax (USD)	7,680.00
Inv. Discount Amount (USD)	0.00
Total Tax (USD)	460.80

Field	Value
Vendor No.	20000
Balance (\$)	4,089.30
Outstanding Orders (\$)	9,605.61
Amt. Rcd. Not Invd. (\$)	0.00
Outstanding Invoices (\$)	1,911.82
Total (\$)	15,606.73
Overdue Amounts (\$) as of 0...	4,903.88
Invoiced Prepayment Amount (\$)	0.00
Payments (\$)	62,209.96
Refunds (\$)	0.00
Last Payment Date	5/13/2021

Posted Purchase Invoices

When you receive the inventory items or when the purchased service is completed, you post the purchase invoice or order to update inventory and financial records and to activate payment to the vendor according to the payment terms.

The screenshot displays the 'Posted Purchase Invoice' form in Dynamics 365 Business Central. The invoice number is 108232, issued by First Up Consultants. The 'General' tab is active, showing the invoice date as 5/13/2021 and the invoice number as INV-106025. The 'Lines' table lists one item: 'Conference Bundle 1-8' with a quantity of 10 and a unit of measure of 'PCS'. The 'Invoice Details' section shows the currency code as 'USD', the payment discount percentage as 0, and the expected receipt date as 5/31/2021. The 'Total Tax (USD)' is 460.80, and the 'Total Incl. Tax (USD)' is 8,140.80. The 'Incoming Document Files' section is empty.

Type	No.	Item Reference No.	Description	Quantity	Unit of Measure Code	Di
Item	1929-W		Conference Bundle 1-8	10	PCS	

Invoice Discount Amount	Total Tax (USD)	Total Excl. Tax (USD)	Total Incl. Tax (USD)
0.00	460.80	7,680.00	8,140.80

Field	Value
Currency Code	USD
Payment Discount %	0
Expected Receipt Date	5/31/2021
Tax Liable	<input type="checkbox"/>

CHANGING PERMISSION SETS

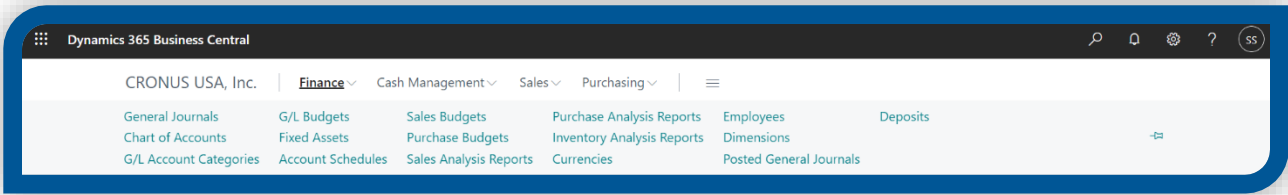
Every business works differently and the roles within organizations have different responsibilities. In Dynamics 365 Business Central, Permission sets are customizable, allowing users to add, delete and modify them to match businesses requirements.

The screenshot displays the 'Permission Sets' list in Dynamics 365 Business Central. The table lists various permission sets, their names, types, and extension names. The 'MY CUSTOMER, EDIT' permission set is highlighted.

PERMISSION SET	NAME	TYPE	EXTENSION NAME
MY CUSTOMER, EDIT	Permissions - Editing Customer	User-Defined	
ANONYM. DATA SHARER	Anonymous Data Sharer	Extension	_Exclude_AnonymizedDataSharing_
DYNAMICS GP DATA MIGRATION	Dynamics GP Data Migration	Extension	Dynamics GP Data Migration
ESSENTIAL BUSINESS HEADLINES	Essential Business Headlines	Extension	Essential Business Headlines
GET ADDRESS IO	UK Postcode GetAddress.io Perm	Extension	GetAddress.io UK Postcodes
IMAGE ANALYZER	Image Analyzer	Extension	Image Analyzer
LATE PAYMENT PREDICTOR	Late payment predictor	Extension	_Exclude_Late Payment Predictor_
MSWALLET STANDARD	MSWallet Permissions	Extension	Microsoft Pay
PAYPAL STANDARD	PayPalStandard Permissions	Extension	PayPal Payments Standard
PAYPAL STANDARD READ	PayPalStandard Read Permission	Extension	PayPal Payments Standard
QBDATA MIGRATION	QB Data Migration Permissions	Extension	QuickBooks Data Migration
QUICKBOOKS DESKTOP SYNCHRONIZATION	QuickBooks Desktop Synchronization	Extension	_Exclude_QuickBooksDesktopSynchronization_

FAINANCE

Business Central streamlines your accounting processes and connects financial data across systems to get an end-to-end view of your business. Take advantage of advanced reporting with integrations to Power BI and Excel. Dynamics 365 Business Central gives your accounting team the tools they need to perform their accounting tasks with the greatest efficiency. Manage payables and receivables, perform banking transactions, and more, all from the easy-to-use online interface.



General Journals

You use general journals to post financial transactions directly to general ledger accounts and other accounts, such as bank, customer, vendor, and employee accounts.

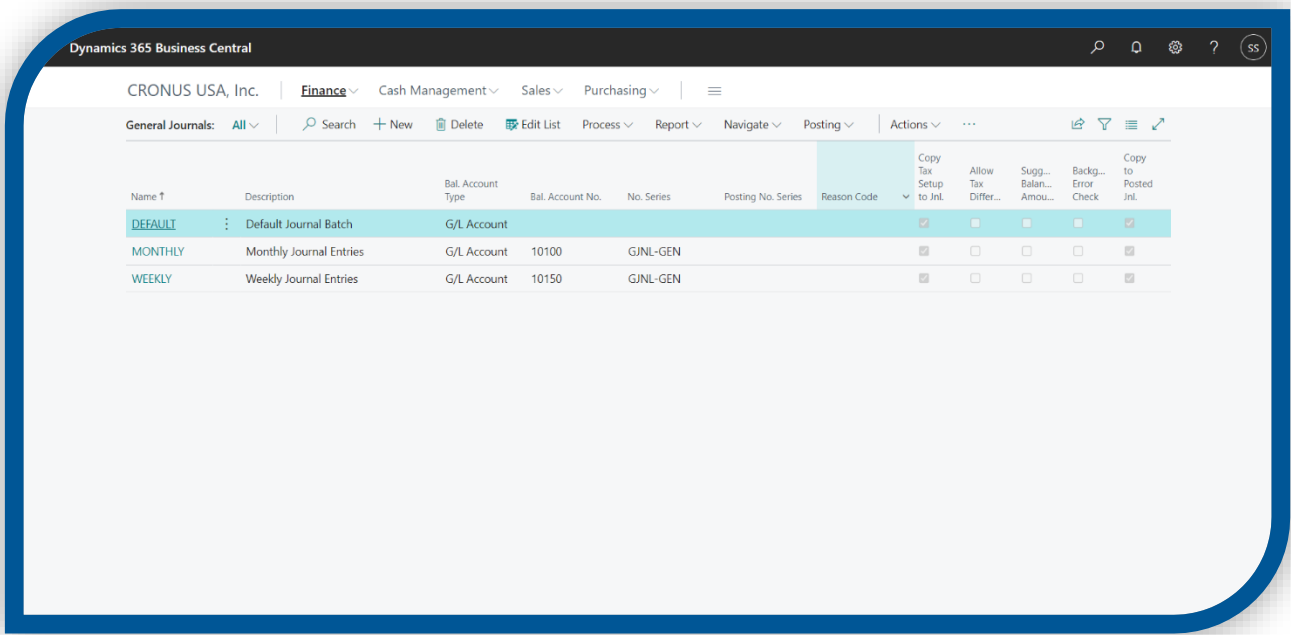


Chart of Accounts

The chart of accounts shows the ledger accounts that store your financial data. Business Central includes a standard chart of accounts that is ready to support your business. However, you can change the default accounts, and you can add new accounts.



Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing

Chart of Accounts: All | Search | + New | Delete | Edit List | Process | Report | Account | Balance | More options

No.	Net Change	Balance	Income/Ba...	Account Subcategory	Account Type	Totaling
10000	—	—	Balance Sh...	Assets	Heading	
10001	—	—	Balance Sh...	Assets	Begin-Total	
10100	18,709.06	18,709.06	Balance Sh...	Cash	Posting	
10150	—	—	Balance Sh...	Cash	Posting	
10200	—	—	Balance Sh...		Posting	
10300	96,549.23	96,549.23	Balance Sh...		Posting	
10400	63,046.57	63,046.57	Balance Sh...	Accounts Receivable	Posting	
10500	—	—	Balance Sh...	Prepaid Expenses	Posting	
10600	—	—	Balance Sh...	Prepaid Expenses	Posting	
10700	76,584.29	76,584.29	Balance Sh...	Inventory	Posting	
10800	5,498.00	5,498.00	Balance Sh...	Equipment	Posting	
10900	3,499.00	3,499.00	Balance Sh...	Accumulated Depreciation	Posting	
10910	—	—	Balance Sh...	Assets	Posting	
10920	—	—	Balance Sh...	Assets	Posting	
10940	—	—	Balance Sh...	Assets	Posting	

Notes +
(There is nothing to show in this view)

Currencies

As companies operate in increasingly more countries/regions, it becomes more important that they can review and report financial data in more than one currency. Your general ledger is set up to use your local currency (LCY), but you can set it up to also use another currency with a current exchange rate assigned.

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing

Currencies: All | Search | + New | Delete | Edit List | Process | Exchange Rate Service | More options

Code #	Description	ISO Code	ISO Numeric Code	Symbol	Exchange Rate Date	Exchange Rate	EMU Curr...	Realized Gains Acc.	Realized Losses Acc.	Unrealized Gains Acc.	Unrealized Losses Acc.	Amount Rounding Precision
CAD	Canadian dollar	CAD	124	\$	1/1/2019	0.665604	<input type="checkbox"/>	40500	40500			0.01
EUR	Euro	EUR	978	€	1/1/2019	0.9952	<input checked="" type="checkbox"/>	40500	40500			0.01
MXN	Mexican peso	MXN	484	\$	1/1/2019	0.111114	<input type="checkbox"/>	40500	40500			0.01
PKR	Pakistani Rupee	PKR	586	Rs	6/12/2019	0.11	<input type="checkbox"/>	40500	40500			0.01

CASH MANAGEMENT

Cash management in Dynamics 365 Business Central is used to manage a company's bank accounts. Before you can start processing bank transactions, you should first set up cash management by creating bank accounts and journals.

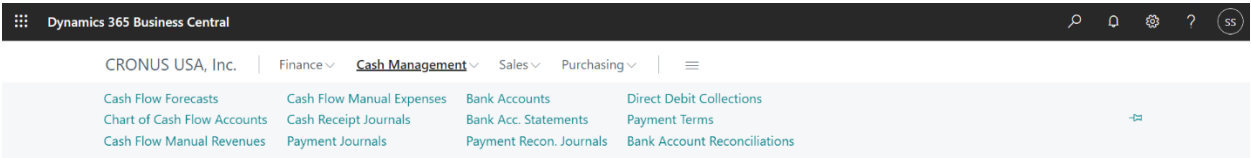
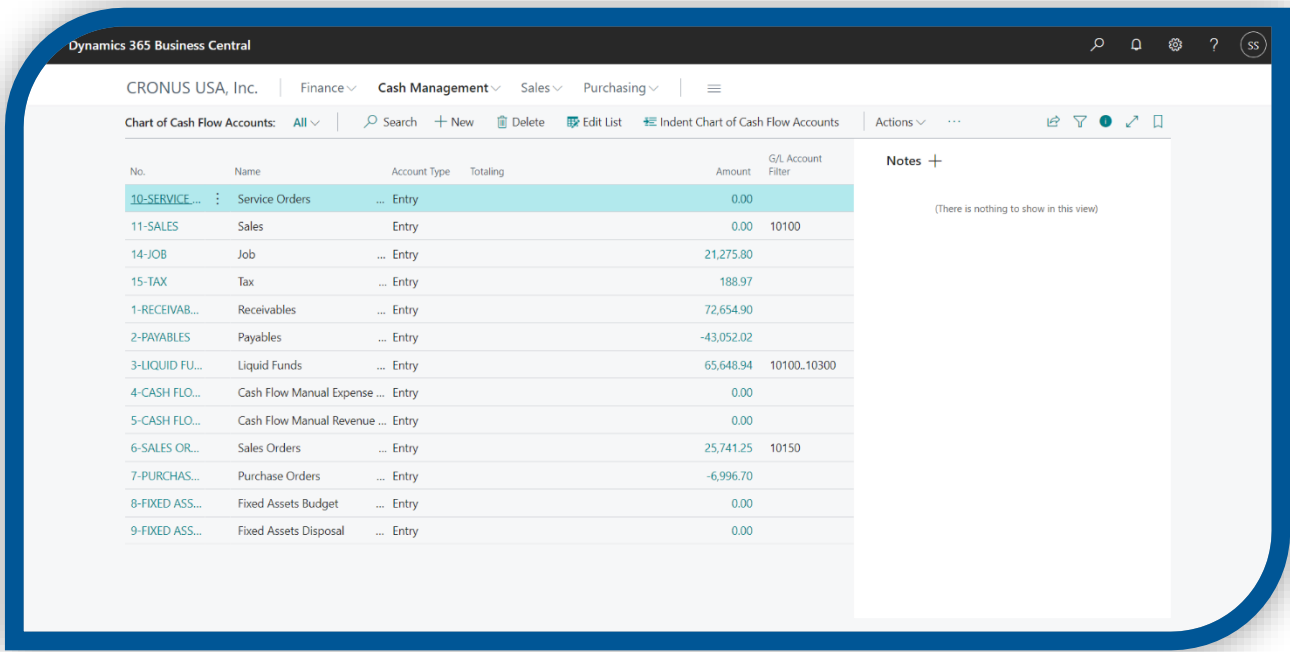


Chart of Cash Flow Accounts

The Cash Flow Statement records receipts and disbursements classified according to the entity’s major activities: Operating, Investing and Financing (net cash inflows/outflows for each activity).



Payment Journal

The payment journal is a general journal that is optimized for making payments. You can quickly add lines manually, you can let Business Central suggest vendor payments, and you can apply the payment to posted documents. Even though you are making payments, you enter a positive amount in the Document Amount field.

Dynamics 365 Business Central

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Payment Journals: All | Search | + New | Delete | Edit List | Process | Report | Navigate | Posting | Actions | ...

Name ↑	Description	Bal. Account Type	Bal. Account No.	No. Series	Posting No. Series	Reason Code	Copy Tax Setup to Jnl.	Allow Tax Differ...	Allow Paym... Export	Sugg... Balan... Amo...	Back... Error Check	Copy to Posted Jnl.
CASH	Cash receipts and payments	G/L Account	10100	GJNL-PMT			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
GENERAL	GENERAL	G/L Account	10100	GJNL-PMT			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PMT REG	Bank Reconciliation	Bank Account	CHECKING	GJNL-PMT			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Bank Accounts

You use bank accounts in Business Central to keep track of your banking transactions. Accounts can be denominated in your local currency or in a foreign currency. After you have set up bank accounts, you can also use the check printing option. The bank accounts include extra functionality for payment reconciliation, bank reconciliation, and the import and export of bank files.

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing

Bank Accounts: All | Search | + New | Delete | Process | Report | Bank Statement Service | Bank Account | Navigate | ...

No. ↑	Name	Bank Account Linking Status	Phone No.	Contact	Balance
8010	Standard Chartered	Not Linked	090078601	Tim David	0.00
CHECKING	World Wide Bank	Not Linked		Grant Culbertson	60,936.06
SAVINGS	World Wide Bank	Not Linked		Grant Culbertson	0.00

Notes +

(There is nothing to show in this view)

BUSINESS CENTRAL CAPABILITIES

Dynamics 365 Business Central's features provide a single, end-to-end solution for managing finances, operations, sales and customer service, as well as the opportunity to easily upgrade from entry-level accounting software and legacy ERP systems. So, let's take a look at what it can do!

Increase financial visibility

Make informed decisions with connected data across accounting, sales, purchasing, inventory, and customer transactions.

Chart financial performance in real time with built-in Power BI dashboards. Identify patterns and trends and gain

new insights with in-depth analysis and unlimited dimensions.

Accelerate financial close and reporting and maintain compliance with quick, accurate, and streamlined accounts receivable and payable.

Improve forecast accuracy with comprehensive data modeling and analysis. Customize and share reports with seamless Excel integration.



Optimize supply chain

Predict the optimal time to replenish stock with built-in intelligence. Use sales forecasts and expected stock-outs to automatically create purchase orders.

Get a holistic view of inventory for timely order fulfilment. Track every item transaction and movement by setting up bins based on warehouse layout and storage unit dimensions.

Calculate and optimize manufacturing capacity and resources to improve production schedules and meet customer demands.

Maintain the right amount of inventory by automatically calculating stock levels, lead times, and reorder points. When requested items are out of stock, automatically suggest replacements.

Boost sales and improve service

Prioritize sales leads based on revenue potential. Keep track of all customer interactions and get guidance on best upsell, cross-sell, and renewal opportunities throughout sales cycle.

Accelerate the sales process from quote to cash. Act quickly on sales-related inquiries, manage service requests, and process payments—all from within Outlook.

Gain a comprehensive overview of service tasks, workloads, and employee skills to effectively assign resources and facilitate case resolution.

Deliver projects on time and under budget

Create, manage, and track customer projects using timesheets along with advanced job costing and reporting capabilities. Develop, modify, and control budgets to ensure project profitability.

Manage resource levels by planning capacity and sales. Track invoicing for customers against planned costs on orders and quotes.

Make effective decisions with real-time insights on project status, profitability, and resource-usage metrics.

Protect data and support GDPR compliance

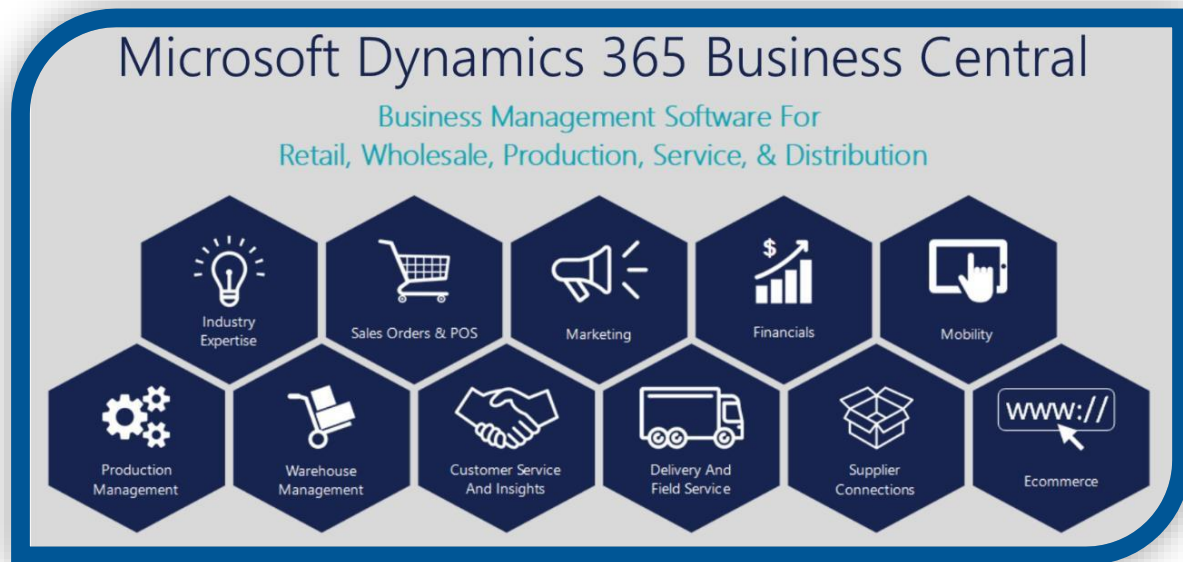
Respect customers' right to privacy and set up business to comply with the General Data Protection Regulation (GDPR). Grant and restrict access to personal data on multiple levels and implement audit trails to ensure security and accountability.

Handle, store, and transmit data securely across systems while protecting it from unauthorized access with automatic Microsoft datacenter encryption.



Run business anywhere

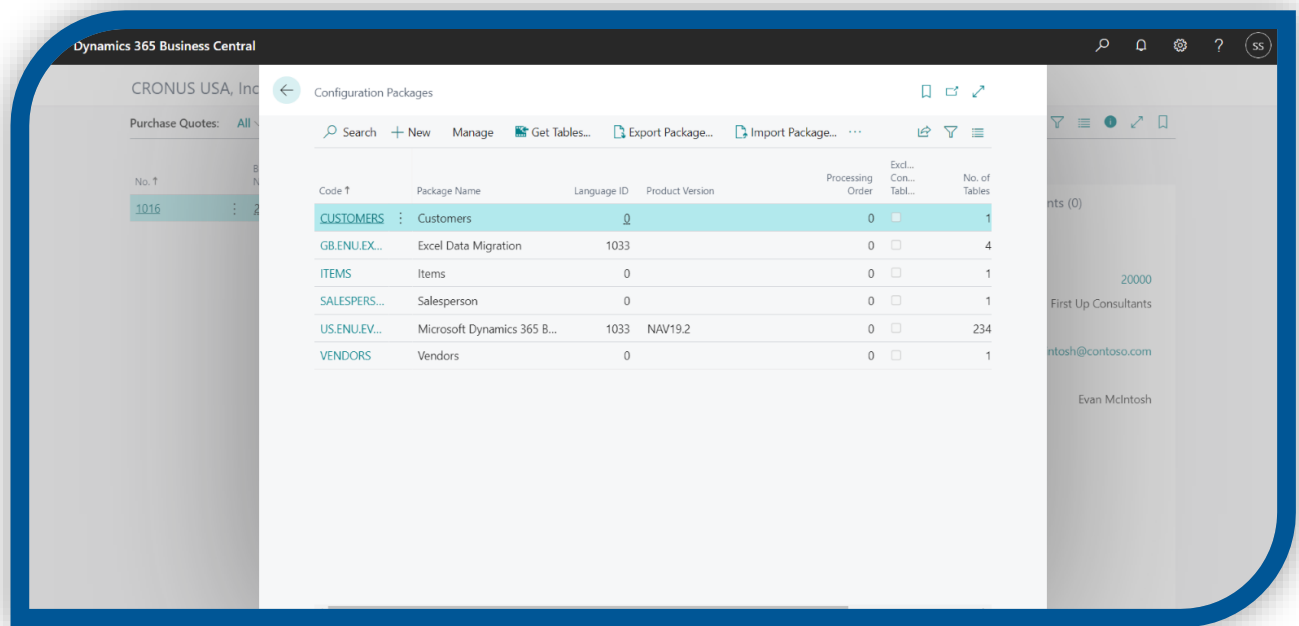
Get the same user experience no matter how it is deployed—in the cloud, on-premises, or a combination of both. **Take the business on the go** with a consistent, intuitive experience across Windows, Android, or iOS devices for mobile access to Business Central.



MIGRATION OF DATA

Data migration is the process of securely migrating data from an on-premises SQL Server instance (or Azure SQL) or any on-premises or cloud to Business Central online. The process uses the Azure Data Factory (ADF) to migrate the data between databases directly, meaning it does not look at any permissions within the applications you are transferring data between, only SQL permissions.

Data is migrated table by table, and success and failures are tracked for each table. If a table fails to migrate, the error will be captured, and the migration moves on to the next table until completed. Tables will fail to migrate if they cannot be found, or if the schema does not match between the cloud and the on-premises tables.



ENVIRONMENT OF BUSINESS CENTRAL

There are two types of environments.

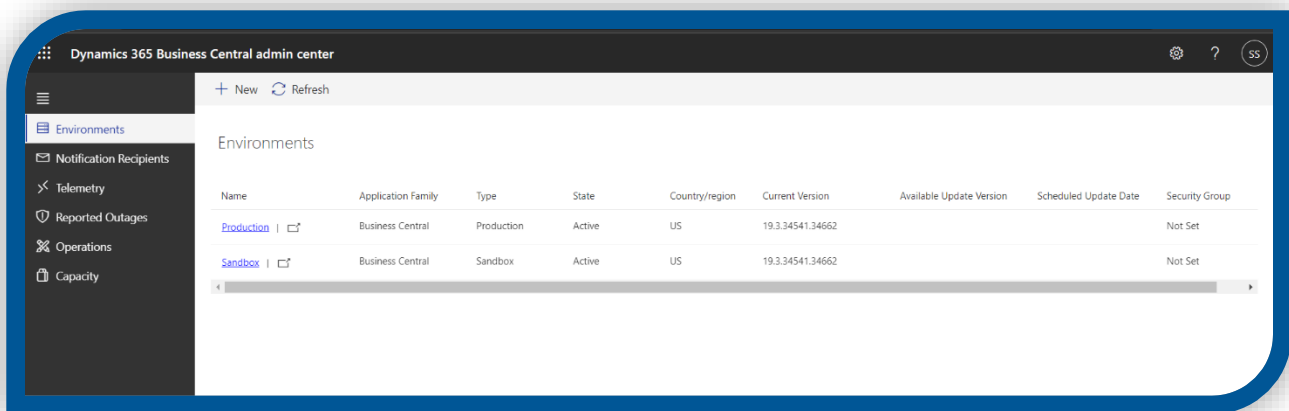
- Production
- Sandbox

Production

Production environments are meant to be precisely that: Environments that a business can run their daily business in Business Central in, deployed on performance tiers in Azure with a guaranteed high level of availability and support. Production environments are backed up automatically and frequently to help protect business data.

Sandbox

Sandbox environments are meant to be precisely that: Environments that you can play around with, use as a testbed for development, and delete at will. You can deploy apps straight from Visual Studio Code to a sandbox environment, and you can attach a debugging session to a sandbox.



DYNAMICS 365 BUSINESS CENTRAL NO CODE SOLUTIONS

Use Microsoft Power Automate, Power Apps, and Power BI to create customized workflows, apps and business insight reports without having to write any code.

Power Automate

Power Automate is a SaaS offering for automating workflows across the growing number of applications and SaaS services that business users rely on. With Power Automate, you can automate tasks by integrating your favorite apps and services (including Power BI) to get notifications, synchronize files, collect data, and more. Repetitive tasks become easy with workflow automation.

Power BI

Power BI is a suite of business analytics tools that deliver insights throughout your organization. Connect to hundreds of data sources, simplify data prep, and drive ad hoc analysis. Produce beautiful reports, then publish them for your organization to consume on the web and across mobile devices. Everyone can create personalized dashboards with a unique, 360-degree view of their business. And scale across the enterprise, with governance and security built-in.

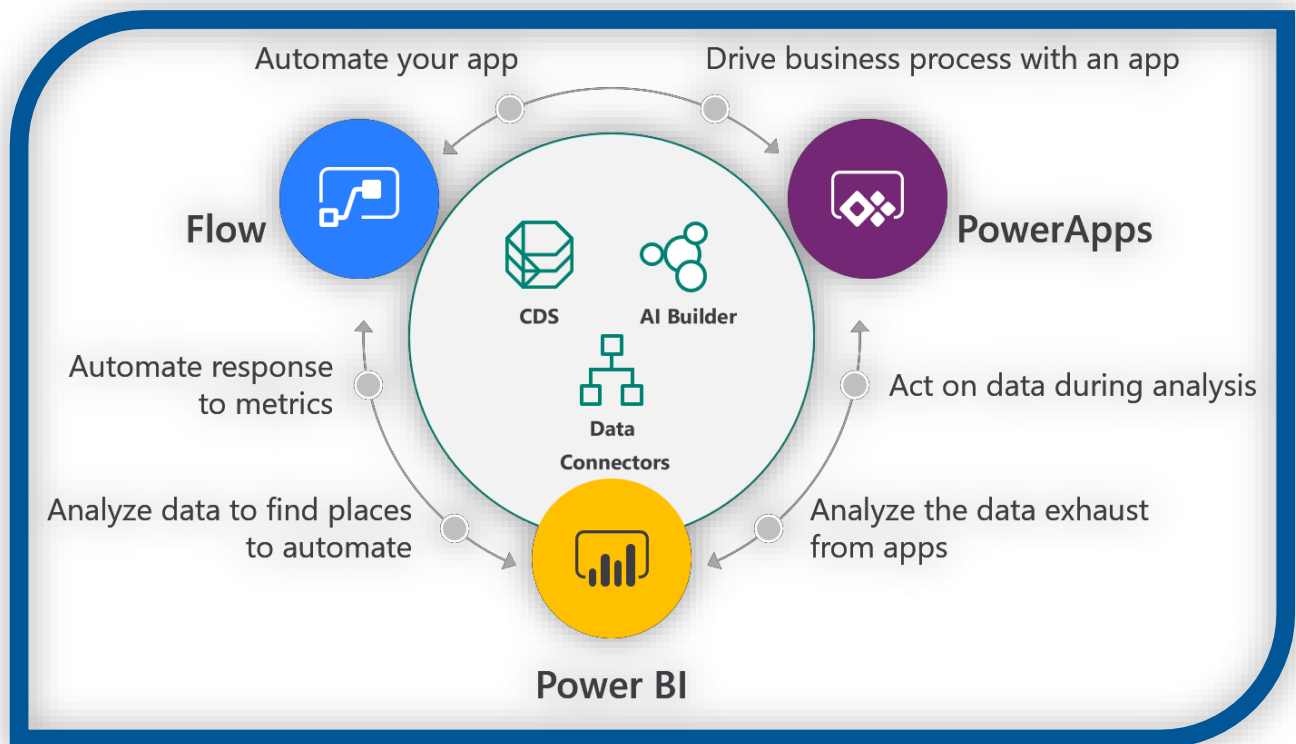
Power Apps

Power Apps is a service that lets you build business apps that run in a browser or on a phone or tablet, and no coding experience is required. Power Apps combines visual drag-and-drop concepts from PowerPoint with Excel-like expressions for logic and working with data.



Benefits of using Power Tools with Dynamics 365 Business Central

You can provide customization services to respond to the customer's individual needs. Power Automate, Power BI, and Power Apps enable you to bring together the data from Dynamics 365 Business Central data, along with data from other applications, services, web pages, etc., in one simple to use set of tools. Monitor, receive notifications, sync data, and build impactful reports and Apps from multiple data sources.



Examples scenarios where Power Tools can be used with Dynamics 365 Business Central

- Create Dynamics 365 Business Central workflows using Power Automate Templates.
- Use Power Automate to Synchronize data between Dynamics 365 Business Central and other applications used in your business.
- Monitor data, manage approvals, and receive email or mobile app notifications using Power Automate.
- Build Power BI reports that are inclusive off all your business data.
- Build and share powerful apps without entering a single line of code.

DYNAMIC 365 BUSINESS CENTRAL SOLUTIONS

Business Central is available in the cloud and to users across various multiple types of devices, which is always up to date. With this modern business platform, you can easily and quickly tailor, extend, and build applications so they fit your specific needs — with little to no code development.

Integrate 3rd Party Solution

Business Central exposes many ready-to-use APIs for Connect apps to make a seamless integration between service and Business Central. Customers can bundle the services with a Business Central and give the customers an integrated experience.

With the existing service offering, path forward with Dynamics 365 Business Central can be:

- Develop a **Connect app** in the preferred coding language, using the exposed APIs from Dynamics 365 Business Central.
- Develop an **Add-on app**, which enriches the Dynamics 365 Business Central experience. This type of app, which integrates into user experience of Dynamics 365 Business Central, allows to build an interface based on how users want their data to flow between Dynamics 365 Business Central and service offering.

Development of a Vertical Solution

Create an app that is specialized within a specific industry. With Embed app, extend and customize the existing Business Central application and enrich the end-user experience with an industry specific functionality using the new and modern development tools and Extensions version 2.0.

To bring the solution to the cloud with Dynamics 365 Business Central there are different considerations:

- Choose to **extend and customize** the existing Dynamics 365 Business Central application and enrich the end-user experience with the industry specific functionality using the new and modern development tools and Extension's version 2.0, which are made available with Dynamics 365 Business Central.
- This app adds functionality in industry expertise, which is useful for streamlining processes and systems

Build Food is designed for food manufactures that need special features to manage the unique demands of working with food. This solution extends the capabilities of Microsoft Dynamics 365 Business Central to include the features that these companies need most by turning an already robust



financial management system into a complete formulation and batch management system that is both powerful and easy to use.

Development of a Horizontal Solution

Extend the experience and capability of Business Central by creating an Add-on app which integrates into user experience of Business Central. Build an interface based on how data should flow between Business Central and the services.

As an app builder, paths forward can be:

- Build an **Add-on app**, which enriches the Dynamics 365 Business Central experience. This type of app, which integrates into user experience of Dynamics 365 Business Central, allows to build an interface based on how data should flow between Dynamics 365 Business Central and the service offering.

Development of a Localization Solution

Comply with local regulatory capabilities by developing for Business Central, which adapts functional areas to the requirements of the local market along with Dynamics 365 Translation Service. Align the core capabilities of local legal requirement and extend existing functionality to successfully compete on your local market.

Localization apps contain a set of functionalities addressing local requirements that fall within one of the categories below. Make sure to split up localization apps at minimum according to these categories:

- **Regulatory requirements** - local functionality that helps businesses fulfill their legal requirements, such as tax reporting, local GAAP, and other regulatory requirements.
- **National standards requirement** – local functionality that addresses local standards, such as banking and payment formats, address formats, or local interpretations of global standards.
- **Market requirements** - nice-to-have, competitive requirements – local functionality beneficial to the productivity business processes in a country and thereby adding value to business but are not required from a regulatory perspective.

Reseller Solution

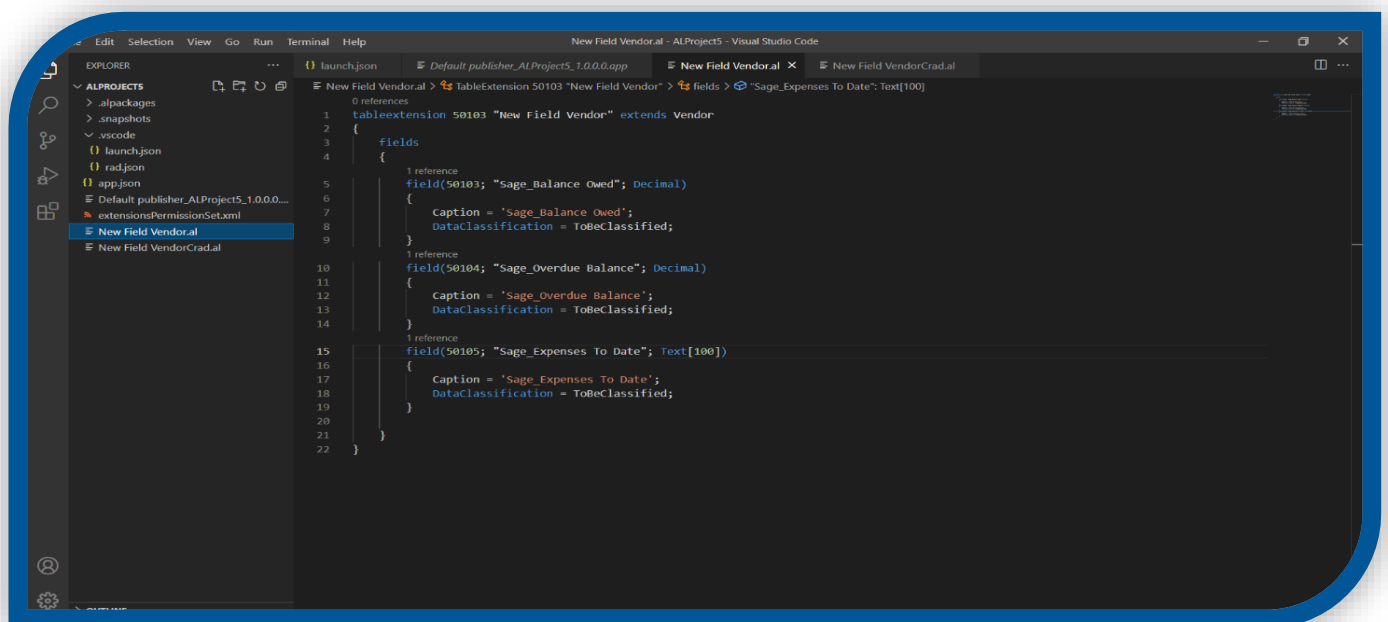
Since every business is unique, with Customizing Tenants, match how to work with the streamlined processes, terminology, and how employees or departments connect and collaborate. Additionally, choose to resell and adjust Business Central to the individual needs of the customers by providing Consulting Services. Or use Power Apps, Power Automate, and Power BI to create Customized Workflows, apps and business insight reports without having to write any code.



CUSTOMIZATION OF BUSINESS CENTRAL

There are different way to customize the Business central.

What you can do	Description	Who sees the changes
Change users' workspace by customizing their assigned role.	Change the user interface for a profile (role) so that all users of that role see a customized workspace. Control and manage users' personalization by disabling the ability to personalize pages and clearing any page personalization.	All users in a specific company.
Change which UI elements are visible.	The Experience setting determines how much of the functionality is displayed in the user interface. Choose between Essential and Premium.	All users in a specific company.
Enable colors on Role Centers to signal importance.	Set up Cues that appear on users' Role Centers to include an indicator that changes color based on the values in the Cues.	All users in a specific company.
Install an extension	Extensions are like small applications that add functionality, change behavior, provide access to new online services, and more. For example, Microsoft provides an extension that provides integration with PayPal Payments Standard.	All users in all companies.



The screenshot displays the Dynamics 365 Business Central user interface. At the top, the header bar shows the company name 'CRONUS USA, Inc.' and navigation tabs for 'Finance', 'Cash Management', 'Sales', and 'Purchasing'. Below the header, a table lists installed components. The table has five columns: 'Is Installed', 'Name', 'Publisher', 'Version', and 'Published As'. The first row is highlighted in light blue.

Is Installed	Name	Publisher	Version	Published As
Yes	ALProject2	Default publisher	v. 1.0.0.0	PTE
Yes	ALProject5	Default publisher	v. 1.0.0.0	PTE
Yes	AMC Banking 365 Fundamentals	Microsoft	v. 19.4.35398.36119	Global
Yes	Application	Microsoft	v. 19.4.35398.36119	Global
Yes	Base Application	Microsoft	v. 19.4.35398.36603	Global
Yes	Business Central Cloud Migrati...	Microsoft	v. 19.4.35398.36119	Global
Yes	Business Central Cloud Migrati...	Microsoft	v. 19.4.35398.36119	Global
Yes	Business Central Intelligent Clo...	Microsoft	v. 19.4.35398.36119	Global
Yes	Ceridian Payroll	Microsoft	v. 19.4.35398.36119	Global
Yes	Company Hub	Microsoft	v. 19.4.35398.36119	Global
Yes	Custom Fields	Apportunix	v. 1.28.0.0	Global
Yes	Data Archive	Microsoft	v. 19.4.35398.36119	Global
Yes	DIOT - Localization for Mexico	Microsoft	v. 19.4.35398.36119	Global
Yes	Dynamics GP History SmartLists	Microsoft	v. 19.4.35398.36119	Global
Yes	Dynamics GP Intelligent Cloud	Microsoft	v. 19.4.35398.36119	Global
Yes	Email - Current User Connector	Microsoft	v. 19.4.35398.36119	Global

CONCLUSION

Microsoft Dynamics 365 Business Central is an end-to-end business management system for companies that have outgrown business. It is a powerful ERP tool available on cloud used to perform multiple functions including inventory management, finance management, Service module, supply chain, and other operations management. Cognitive Convergence is currently helping a handful of clients implement Dynamics 365, so we can attest that it is a strong product when used in the right situations. The easiest way to mitigate these risks is to hire an independent, technology-agnostic digital transformation consulting firm such as Cognitive Convergence to help validate your software decision, prepare for implementation readiness, help manage your organizational change program, and provide quality assurance over your system integrator.

CONTACT US

Cognitive Convergence is Microsoft Certified Partner. Review us in Microsoft web site here:

<https://appsource.microsoft.com/en-pk/marketplace/partner-dir/01dec2cc-ce32-4da9-9d33-946f58de01dd/overview>

I want to ensure, high level of privacy and confidentiality by signing in NDA. We have a very competent developer and consultant for Microsoft Cloud consultancy. We offer high quality services with strong focus of excellence in solution delivery.

Kindly see Cognitive Convergence vision for software development security as below.

<http://www.cognitiveconvergence.com/ip-security.html>

To see other videos in Cognitive Convergence, please do visit this link:

https://www.youtube.com/channel/UCOdtEU8k1L_xC_Zu4yy7ycw/videos

Thanks/Regards,

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