

# Dynamics 365 Business Central

Configuration, integration and optimization

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# 1.Introduction to Dynamics 365 Business Central

## What is Dynamics 365 Business Central?

Dynamics 365 Business Central is business software from Microsoft that serves as an integrated solution for finance, sales, warehousing and production. It was specially developed for small and medium-sized enterprises (SMEs) and offers a variety of functions that make it possible to automate and optimize business processes.

Business Central is built on the Dynamics 365 platform and uses the same technology as the enterprise version of Dynamics 365. However, it is specially adapted for the needs of SMBs and offers a user-friendly interface and advanced customization options.

Business Central's financial accounting features include managing accounts, banking, general ledger, budgeting, and analytics, among others. Sales features include managing customers, quotes, orders, and invoices. Warehousing features include managing items, inventory, orders, and shipments. Production functions include production order management, resource planning, and manufacturing.

Business Central also offers a range of analysis tools that companies can use to visualize and evaluate their business data. It's also integrated with other Microsoft products like Office 365 and Power BI, making collaboration and data analysis easier.

The system is available both as a cloud-based solution and as an on-premise solution. It can also be deployed as a hybrid solution, running some functions in the cloud and others on-premises.

Overall, Dynamics 365 Business Central is a powerful and flexible solution for SMBs, enabling them to automate and streamline their business processes to increase their competitiveness and improve their business outcomes.

## Dynamics 365 Business Central architecture

The architecture of Dynamics 365 Business Central is modular and based on the Microsoft Dynamics 365 platform. It consists of multiple layers that work together to support and automate the business processes.

The first layer is the user interface. This layer provides the user interface through which the end users can use the application. The user interface can be accessed either via a web interface or via a dedicated Windows application.

The second layer is the application layer. This layer contains the business logic and functionality of Business Central. It consists of several modules responsible for finance, sales, warehousing and production. Each module contains a set of functions required to automate specific business processes.

The third layer is the data layer. This tier contains the databases used by Business Central. The databases can be hosted either in the cloud or on-premise. Business Central supports both Microsoft SQL Server and Microsoft Azure SQL Database as databases.

The fourth layer is the platform layer. This layer contains the technology that supports the application. These include the Microsoft Dynamics 365 platform, Microsoft Power Platform and Azure.

Overall, the architecture of Dynamics 365 Business Central is modular and allows the application to be adapted to the needs of the company. It supports both on-premise and cloud-based deployment models and offers high scalability and reliability, enabling companies to automate and optimize their business processes and increase their competitiveness.

## Supported Platforms

Dynamics 365 Business Central supports a variety of platforms to give companies the ability to implement the application in their desired environment.

**On-premise:** Business Central can be hosted as an on-premise solution on your own server or in a virtual environment. In this case it is necessary to provide the necessary hardware and the necessary server operating systems.

**Cloud:** Business Central can also be hosted in the cloud, either through the Microsoft Azure cloud service or through a Microsoft-authorized cloud service provider. This option allows companies to use the application without the need for on-premises infrastructure and offers high availability and scalability.

**Hybrid:** Business Central also supports a hybrid deployment model, with some components hosted in the cloud and others on-premises. This allows companies to take advantage of both cloud and on-premise implementations and customize the application to the specific needs of the business.

Regardless of which deployment model is chosen, Business Central supports both Windows and web-based user interfaces, and allows users to use the application from anywhere with an Internet connection.

Dynamics 365 Business Central also supports various operating systems and databases, making it possible to deploy the application in a variety of environments. Supported operating systems are Windows, Linux, and MacOS. Supported databases are Microsoft SQL Server, Microsoft Azure SQL Database and Microsoft Dynamics NAV.

Overall, Dynamics 365 Business Central offers a variety of ways to deploy the application in an environment that best suits the needs of the business and allows the application to be used flexibly and scalably.

## 2.Planning and preparation

### Hardware and software requirements

The hardware and software requirements for Dynamics 365 Business Central depend on the implementation method you choose.

#### On-premise implementation:

Processor: Intel x64-based processor with at least 4 cores and 2.4 GHz or faster

Memory: 8 GB RAM or more

Hard disk space: at least 1 GB of free space for the installation plus additional space for data and databases

Operating system: Windows Server 2019, Windows Server 2016, Windows Server 2012 R2 or Windows 10

Database: Microsoft SQL Server 2017, 2016, 2014 or 2012

#### Cloud Implementation:

Processor: Intel x64-based processor with at least 4 cores and 2.4 GHz or faster

Memory: 8 GB RAM or more

Hard disk space: at least 1 GB of free space for the installation plus additional space for data and databases

Operating system: Windows Server 2019, Windows Server 2016, Windows Server 2012 R2 or Windows 10

Database: Microsoft Azure SQL Database

#### Hybrid implementation:

Processor: Intel x64-based processor with at least 4 cores and 2.4 GHz or faster

Memory: 8 GB RAM or more

Hard disk space: at least 1 GB of free space for the installation plus additional space for data and databases

Operating system: Windows Server 2019, Windows Server 2016, Windows Server 2012 R2 or Windows 10

Database: Microsoft SQL Server 2017, 2016, 2014 or 2012 or Microsoft Azure SQL Database

A web browser and an internet connection are required to use Dynamics 365 Business Central via a web-based user interface. Supported web browsers are Microsoft Edge, Google Chrome, Mozilla Firefox and Apple Safari.

It is important to note that these are the minimum requirements and depending on the size and needs of the business, higher hardware and software requirements may be required.

We recommend discussing the requirements with a Microsoft partner or a Dynamics 365 consultant to ensure the environment meets the needs of the organization.

### Planning of user and company accounts

Planning user and company accounts is an important step in implementing Dynamics 365 Business Central. It allows assigning access rights and managing user roles and permissions.

#### User Accounts:

Each user who wants to access Dynamics 365 Business Central needs their own user account. These accounts can be created through user management in Dynamics 365 Business Central administration. There are different types of user accounts, such as administrator, power user, standard user and external user. Each user type has its own access rights and permissions.

#### Company Accounts:

Company accounts are available in Dynamics 365 Business Central to manage the data and business processes of multiple companies. Each company needs its own company account. With the company account, you can manage the financial data, the stock levels and the sales data of each company. It is possible to create and manage multiple company accounts in one Dynamics 365 Business Central instance.

#### Roles and permissions:

Roles and permissions are important to ensure each user can only access the features and data for which they are authorized. Dynamics 365 Business Central supports management of user roles and permissions. There are predefined roles such as Administrator, Power User and Standard User, but it is also possible to create your own roles with custom permissions.

It is important to plan and define user and company account requirements in advance. This enables efficient management of access rights and easy management of user roles and permissions. It is recommended that user and company account planning be performed in collaboration with a Microsoft partner or a Dynamics 365 consultant to ensure that the environment meets the needs of the company.



## Dynamics 365 Business Central organization theme

The design of a Dynamics 365 Business Central organization consists of several important aspects that must be considered to ensure an efficient and successful implementation.

First, it is important to thoroughly analyze the business processes and requirements to ensure the solution covers them. This requires a deep understanding of corporate strategy, products and services, as well as operations and workflows.

Second, the organization of the company should be carefully planned to define the right hierarchical structure and the appropriate access rights for users and roles. This allows users to see and use only the data and features relevant to them.

Third, customizations to the solution should be carefully planned to ensure they fit business processes and requirements, and that the solution remains stable and scalable.

Fourth, the data migration should be carefully planned and executed to ensure that all relevant data is correctly migrated to the new solution and that no important data is lost.

Finally, it is important to perform regular maintenance and monitoring of the solution to ensure that it is working properly and to be able to react quickly to any problems that may arise.

It is important to have good documentation and training for users so that they can use the solution effectively.

Overall, the design of a Dynamics 365 Business Central organization requires a thorough analysis of business processes and requirements, careful planning of the organization and customizations, successful data migration, and regular maintenance and monitoring to ensure the solution can be successfully implemented and used.

## 3. Installation and Configuration

### Installing Dynamics 365 Business Central

Installing Dynamics 365 Business Central requires a few steps to ensure the solution is set up and configured properly.

**Preparation:** Before you begin the installation, you should ensure that your computer meets the minimum requirements that Microsoft has set for the solution. These include a 64-bit operating system, at least 8 GB of RAM and a fast internet connection.

**Download:** Before you can start the installation, you need to download Dynamics 365 Business Central from the Microsoft website. You need a Microsoft account to do this.

**Installation:** Once the download is complete, launch the setup file and follow the installation wizard instructions. During the installation you will be asked to make a number of settings, such as the language and the country.

**Setup:** After the installation is complete, you need to set up Dynamics 365 Business Central. This includes, among other things, creating a new database, configuring user accounts and roles, and adapting the solution to your business processes and requirements.

**Data migration:** If you already have data in another solution, you need to migrate it to Dynamics 365 Business Central. To do this, you can use tools like the Microsoft Data Migration Assistant to transfer the data from the source to the target database.

**Testing:** After the setup and data migration is complete, you should thoroughly test the solution to ensure it is working properly and meets all requirements.

**Training:** Train your employees to use Dynamics 365 Business Central effectively.

It is important that Dynamics 365 Business Central installation is performed by qualified and experienced professionals to ensure the solution is set up and configured properly and to avoid implementation issues.

### Configure network components

Configuring network components is an important step in setting up and operating a corporate network. Here are some steps to consider when configuring network components:

**Planning:** Before you start with the configuration, you should create a detailed network plan. This plan should include the number and type of devices used in the network, the topology of the network (e.g. star, ring, bus), the IP address ranges and other important information.

**Router:** The router is the heart of the network and is responsible for connecting the network to the Internet. When configuring the router, you should set the IP address, subnet mask, default gateway, and DNS servers.

**Switch:** A switch is a network device that manages the connections between different devices on the network. When configuring the switch, you should set the IP address, subnet mask, and VLAN settings.

**Firewall:** A firewall is a security mechanism that monitors network traffic and blocks unwanted connections. When configuring the firewall, you should set the rules that determine which connections are allowed or blocked.

**DHCP:** DHCP (Dynamic Host Configuration Protocol) is a protocol that automatically assigns IP addresses to devices on the network. When configuring the DHCP server, you should determine the range of IP addresses that will be managed by DHCP and the lease time (the length of time that an IP address is assigned to a device).

**DNS:** DNS (Domain Name System) is a service that allows domain names to be translated into IP addresses. When configuring the DNS server, you should set the IP address of the DNS server and create the DNS records required for your network.

**Testing:** After configuration is complete, you should thoroughly test the network to ensure that all components are working properly and that all requirements are met.

**Security:** An important aspect when configuring network components is security. You should ensure that all devices and services are protected with strong passwords and that software updates are performed regularly to ensure devices are protected against known security vulnerabilities.

**Monitoring:** Regular monitoring of the network is important to ensure that all components are working properly and that there is no unwanted activity or connections. There are many tools and technologies you can use to monitor the network, such as network monitoring software, SNMP (Simple Network Management Protocol), and syslog servers.

**Documentation:** Complete and up-to-date documentation of the network is essential to be able to solve problems quickly and effectively. Documentation should include details such as IP addresses, device and component inventory, network topology, and security policies.

It is important to note that configuring network components can be a complex process and it is important to plan and test carefully before making any changes in a production environment. It is also recommended to contact a qualified network administrator or an IT consultant to ensure that the configuration is done correctly.

## Create Dynamics 365 Business Central organizations and locations

**Sign in:** Before you can create a new Dynamics 365 Business Central organization, you must sign in to Dynamics 365 Business Central. This can be done either through the Dynamics 365 Business Central website or through the Dynamics 365 Business Central app.

**Creating a New Organization:** Once logged in, you can create a new organization by clicking on the "Organizations" icon in the navigation bar on the left. Here you will find the option "Create a new organization". Enter a name for the organization and select a country and currency.

**Creating Locations:** After creating a new organization, you can add locations by clicking on the Locations icon in the navigation bar on the left. Here you will find the "New location" option. Enter a name for the location and select a country and currency.

**Configure Financial Settings:** Once you have created an organization and locations, you must configure financial settings in order to perform accounting and financial transactions. This includes configuring charts of accounts, tax rules and currencies.

**Configure inventory and product settings:** If you have created an organization that uses inventory and product settings, you must configure them in order to perform inventory and product management. This includes configuration of bin locations, product groups, and units of measure.

**Test and Release:** After configuring all settings, you should test the organization and locations to ensure they are working properly. Once you're happy, you can share the organization and locations for other users to use.

It's important to note that creating Dynamics 365 Business Central organizations and locations can be a complex process, and it's important to plan and configure carefully to ensure the organization and locations meet the needs of your business. It is also important that the right staff is selected to manage the organization and sites as this is an important task to ensure that the organization and sites are functioning properly.

There are also various extensions and add-ons that you can integrate with your Dynamics 365 Business Central organizations and locations to provide additional features and functionality. Examples of this are solutions for finance, warehouse management, production planning and control, project management and much more. It is important to choose and implement these extensions carefully to ensure they meet your needs.

There are also resources such as documentation, training, and community support that can help you successfully create and configure the Dynamics 365 Business Central organization and locations. It's important to leverage these resources to ensure you're taking the right steps and completing all the necessary steps to create a successful Dynamics 365 Business Central organization and locations.

## 4. Management of user accounts and companies

### Creating and managing user accounts

Creating and managing user accounts in Dynamics 365 Business Central is an important part of running an organization. To create user accounts, you must first create a role or permission group that defines the permissions and access rights for the users. These roles and permission groups can then be applied to user accounts to grant them the appropriate access rights.

There are different types of user accounts that can be created in Dynamics 365 Business Central, such as internal user accounts for employees and external user accounts for customers and partners. Each user account is then assigned individual permissions that limit access rights to specific functions and data within the organization.

Once created, user accounts must be maintained regularly to ensure they are current and secure. This includes monitoring user account activity, changing passwords, and deactivating user accounts that are no longer used. It's also important to regularly review and adjust user account permissions to ensure users only have the access rights they need to perform their jobs.

It is also important to implement security measures such as using strong passwords and setting up two-factor authentication to ensure user accounts are secure and cannot be used by unauthorized persons.

Overall, creating and managing user accounts in Dynamics 365 Business Central is an important part of running an organization and requires careful planning, monitoring, and maintenance to ensure the organization is functioning securely and efficiently.

### Create and manage companies

Creating and managing companies in Dynamics 365 Business Central is an important part of running an organization. A company in Business Central is a separate legal entity that can manage its own finances, customers, suppliers, and items.

To create a new company, you must first enter the basic information such as company name, address and tax number. It's also important to set the right currency, date format, and tax rules for the business. Then you can set up charts of accounts, accounting rules, and other financial information for the company.

Once the company is created, you can manage it by managing and monitoring the finances, customers, suppliers and items. It is also possible to manage multiple companies within the same

Business Central installation. However, this requires appropriate configuration and access rights to ensure that users can access the correct company data.

It is important to regularly review and, if necessary, adjust company data to ensure that it is up-to-date and correct. This includes monitoring financial and accounting data to ensure it is accurate and in compliance with applicable laws and regulations.

Overall, creating and managing companies in Dynamics 365 Business Central is an important part of running an organization and requires careful planning, monitoring, and maintenance to ensure the organization is functioning effectively and legally.

### Delegated Access Rights

Delegated access rights allow administrators to delegate control over certain aspects of the Dynamics 365 Business Central system to other users. This makes it possible to simplify administration of the organization and reduce the burden on administrators by delegating tasks to users who are best qualified to perform them.

There are several types of delegated access rights in Business Central, including:

**Role-based access rights:** These allow administrators to grant users access to specific functions and data based on their role within the organization. For example, a finance manager might have access to financial data, while a warehouse worker only has access to warehouse data.

**Custom Permissions:** These allow administrators to set specific permissions for individual users or groups of users. For example, an administrator might grant one user permission to create specific financial reports while another user does not have that permission.

**Delegated Administration:** This allows administrators to let other users manage certain aspects of the system, such as user accounts or company configurations.

It is important to carefully consider which access rights to delegate to which users to ensure data security and the integrity of the system are maintained. It is also important to regularly review and, if necessary, adjust access rights to ensure they are always appropriate and up-to-date.

Overall, delegation of access rights in Dynamics 365 Business Central allows administrators to simplify the management of the organization and reduce the burden on administrators by delegating tasks to users who are best qualified to perform them.

## Enterprise Access Policies

In Dynamics 365 Business Central there is the possibility to create access policies for companies to control access to company data. This enables administrators to ensure that only authorized users can access specific company data.

There are several types of access policies that can be created for organizations in Business Central, including:

**Role-based access policies:** These allow administrators to grant users access to specific company data based on their role within the organization. For example, a finance manager might have access to a company's financial data, while a warehouse worker only has access to warehouse data.

**Custom Access Policies:** These allow administrators to set specific access rights for individual users or groups of users. For example, an administrator might give one user permission to create specific financial reports for a company, while another user does not have that permission.

**Delegated Administration:** This allows administrators to let other users manage certain aspects of the system, such as managing corporate access policies.

It is important to carefully consider which access policies to create for which organizations and which users should have access to which data to ensure data security and the integrity of the system are maintained. It is also important to regularly review and, if necessary, adjust access policies to ensure they are always appropriate and up-to-date.

Overall, creating enterprise access policies in Dynamics 365 Business Central allows administrators to control access to enterprise data and ensure that only authorized users can access that data. It is important to plan access policies carefully and review them regularly to ensure they are always appropriate and up to date.

Another important aspect of managing corporate access policies is controlling access to corporate data. Dynamics 365 Business Central provides administrators with the ability to monitor activity logs to see who accessed what data and when. This allows administrators to quickly identify and fix potential security breaches.

In terms of Delegated Access Rights, it allows administrators to delegate certain tasks and responsibilities to other users, such as managing enterprise access policies, without losing control of the entire system. This can be useful when managing multi-site businesses or managing specialized areas such as finance or human resources.

Overall, creating and managing enterprise access policies in Dynamics 365 Business Central is an important part of security and privacy in the system. Through careful planning and regular monitoring, administrators can ensure only authorized users have access to company data and potential security breaches can be quickly identified and remediated.

## 5. Management of finances and financial reports

### Configure general ledger

Financial accounting in Dynamics 365 Business Central can be configured in many different areas to meet the needs of the business. Some of the most important aspects to consider when configuring general ledger are:

**Chart of Accounts:** This is the main ledger that lists all of the company's financial transactions. It can be customized to the needs of the business by adding, deleting or renaming accounts.

**Currencies and exchange rates:** Dynamics 365 Business Central supports the processing of financial transactions in multiple currencies. Admins can set and update exchange rates to ensure financial reports and analysis are accurate.

**Financial Periods:** Administrators can set the company's financial periods, such as monthly or quarterly. This affects how financial transactions are presented in the financial reports.

**Financial reports:** Dynamics 365 Business Central offers a variety of financial reports that administrators can configure to meet the needs of the business. This includes balance sheets, income statements, and cash flow reports.

**Tax regulations:** Administrators can configure the company's tax regulations to ensure that financial transactions comply with applicable tax laws. This includes setting tax rates, preparing tax reports, and processing tax payments.

**Integration possibilities:** Dynamics 365 Business Central can be integrated with other systems such as banks, payment processors and tax software to automatically import the financial data and simplify financial accounting.

Overall, Dynamics 365 Business Central offers many ways to adapt and automate financial accounting to the needs of the company. Through careful planning and regular monitoring, administrators can ensure that the company's financial data is always accurate and up-to-date. However, it is important



for administrators to be aware of company and country financial accounting policies and laws to ensure that company financial information is always compliant with applicable regulations.

Another important aspect of configuring financial accounting in Dynamics 365 Business Central is managing financial accounts and transactions. Administrators can create, edit, and delete accounts to keep the company's financial data accurate. You can also record and manage financial transactions such as invoices, payments, and credit notes to ensure the company's financial information is always up to date.

Another important tool for financial accounting in Dynamics 365 Business Central is budgeting. Administrators can create and manage budgets to plan and monitor the company's financial data. You can also create financial reports to compare the company's actual financials with the planned financials and identify discrepancies.

Overall, Dynamics 365 Business Central offers many ways to configure and manage the company's financial accounting. Through careful planning and regular monitoring, administrators can ensure that the company's financial data is always accurate, up-to-date and compliant with applicable regulations.

### [Configure financial reports](#)

Configuring financial reports in Dynamics 365 Business Central is an important aspect of financial accounting. Administrators can create financial reports to analyze key company financial data such as income statements, balance sheets, and cash flows.

One of the ways to create financial reports in Dynamics 365 Business Central is by using predefined report templates. These templates already contain the necessary financial accounts and transactions and can be quickly and easily customized to meet the needs of the business. Administrators can also create custom reports to analyze specific financial data.

Another important aspect of financial report configuration is the management of financial dimensions. Financial dimensions are attributes that can be associated with financial transactions and accounts to segment and analyze the company's financial data. Examples of financial dimensions are projects, departments, and cost centers.

Administrators can also schedule and automate financial reports to ensure the company's financial data is always up to date. You can set reports to be automatically generated and sent to specific users to increase the efficiency and accuracy of financial data analysis.

Overall, Dynamics 365 Business Central offers many ways to configure and manage financial reports. Through careful planning and regular monitoring, administrators can ensure that the company's financial data is always accurate and up-to-date and can analyze and monitor important company financial data.

### Configure financial processes

Configuring financial processes in Dynamics 365 Business Central is an important aspect of financial accounting. It enables companies to automatically and efficiently manage financial processes such as generating invoices, processing incoming payments and generating financial reports.

One of the most important functions when configuring financial processes is setting up financial accounting rules. These rules determine how financial transactions should be processed, such as which accounts should be automatically created and which accounts should be used for certain types of transactions. Administrators can also create rules to control the automation of financial processes, such as generating invoices, processing cash receipts, and generating financial reports.

Another important aspect of financial process configuration is the management of financial dimensions. Financial dimensions are attributes that can be associated with financial transactions and accounts to segment and analyze the company's financial data. Examples of financial dimensions are projects, departments, and cost centers.

Administrators can also schedule and automate financial processes to ensure the company's financial data is always up to date. You can set processes to be automatically created and sent to specific users to increase the efficiency and accuracy of financial data processing.

Overall, Dynamics 365 Business Central offers many ways to configure and manage financial processes. Through careful planning and regular monitoring, administrators can ensure that the company's financial data is always accurate and up-to-date and manage important financial processes automatically and efficiently.

### Configure financial policies

Configuring financial policies in Dynamics 365 Business Central is an important aspect of financial accounting because it enables companies to control and monitor financial processes and transactions.

One of the most important functions when configuring financial policies is setting up financial controls. These controls determine which financial transactions may and may not be conducted. Examples of financial controls include checking financial transactions for duplicate entries, checking

financial transactions for budget overruns, and checking financial transactions for compliance with financial policies.

Another important aspect of financial policy configuration is managing financial roles and permissions. This allows organizations to control and restrict users' access rights to financial data and processes. Examples of finance roles are finance manager, accountant, and financial analyst.

Administrators can also set financial policies for the generation of financial reports. This includes determining reporting periods, selecting financial data for reporting, and determining format and layout for financial reports.

Overall, Dynamics 365 Business Central offers many ways to configure and manage financial policies. Through careful planning and regular monitoring, administrators can ensure that the company's financial data is always accurate and in accordance with financial policies, and that financial processes and transactions are properly controlled and monitored.

## 6. Management of sales and marketing

### Configure sales processes

Configuring sales processes in Dynamics 365 Business Central is an important aspect of business operations as it enables companies to effectively manage and monitor their sales activities.

One of the most important functions when configuring sales processes is setting up sales channels. These channels determine how customers can be reached and often include point of sale, online shops and telephone sales processes. In Dynamics 365 Business Central, administrators can create, manage, and monitor sales channels to ensure that the company's sales activities are effective and successful.

Another important aspect of sales process configuration is managing sales roles and permissions. This enables companies to control and restrict users' access rights to sales data and processes. Examples of sales roles are sales manager, sales representative, and sales analyst.

Admins can also set rules for pricing and managing discounts and offers. This allows companies to create and manage quotes quickly and easily, ensuring prices and quotes are always correct and competitive.

Overall, Dynamics 365 Business Central offers many ways to configure and manage sales processes. Through careful planning and regular monitoring, administrators can ensure that the company's sales activities are effective and successful, and that sales processes and transactions are properly controlled and monitored.

### Configure marketing processes

Dynamics 365 Business Central offers a variety of tools and functions that make it possible to configure and automate marketing processes. Here are some steps to consider when configuring marketing processes in Dynamics 365 Business Central:

**Build a marketing list:** A marketing list is a collection of contacts or prospects who have been targeted for a specific campaign or offer. You can create a marketing list by adding contacts manually or by importing contacts from an existing list.

**Create a Marketing Campaign:** A marketing campaign is a planned activity aimed at reaching and influencing potential customers. You can create a marketing campaign by providing a name, description, goal and time period.

**Create marketing activities:** Marketing activities are the individual steps performed in a marketing campaign. Examples of marketing activities are email marketing, telephone marketing and trade fairs. You can create marketing activities by providing a name, description, goal and time period.

**Track marketing campaign performance:** Dynamics 365 Business Central provides various tools for tracking marketing campaign performance. For example, you can track the number of contacts who opened an email, the number of contacts who clicked a link, and the number of contacts who took a specific action.

**Adjust and optimize:** Once you've tracked the performance of your marketing campaign, you can adjust and optimize the campaign to get better results. For example, you can expand or contract the audience, change the message content, or increase or decrease the frequency of contact.

It is important to note that the configuration of marketing processes in Dynamics 365 Business Central can vary by company and industry.

## Configure Marketing Policies

Configuring marketing policies in Dynamics 365 Business Central enables companies to control and monitor marketing activities and processes. Some of the steps to consider when configuring marketing policies in Business Central include:

**Creating Audiences:** Audiences can be created by setting specific criteria such as age, gender, location, etc. This allows companies to create and manage targeted marketing campaigns.

**Creating Marketing Activities:** Businesses can create different types of marketing activities such as email marketing, social media marketing, phone marketing campaigns, etc.

**Creating marketing budgets:** Businesses can create and manage marketing budgets to control and monitor spending on marketing activities.

**Creating Marketing Metrics:** Businesses can create metrics to measure and monitor the performance of marketing activities. This may include the number of emails received, the number of clicks on links in emails, the number of products sold, etc.

**Creating marketing strategies:** Businesses can create marketing strategies to control and monitor the marketing activities and processes. These strategies may include how often to conduct marketing activities, which audiences to target, and which marketing channels to use.

**Creating Marketing Policies:** Organizations can create marketing policies to control and monitor marketing activities and processes. These policies may include what type of content may be used in marketing activities, how often marketing activities may be conducted, and which departments are responsible for conducting marketing activities.

## 7. Inventory and production management

### Configure warehouse processes

Configuring warehouse processes in Dynamics 365 Business Central primarily involves setting up warehouse locations, inventory items, and inventory movements.

**Warehouses:** These are physical locations where items are stored. Examples of this are warehouses, shelves or drawers. In Business Central you can create, edit and delete storage locations. You can also specify which items should be stored in which storage location.

**Stock Items:** These are the items that you actually have in stock. In Business Central, you can create, edit, and delete inventory items. You can also specify how many items are in stock and where they are stored.

**Inventory movements:** These are movements of items between storage locations or between stock levels and other processes such as sales, purchasing, etc. You can manually record or automatically record inventory movements in Business Central when items are sold or bought.

Other aspects to consider would be managing inventory accounts, setting up inventory management rules and using bin space optimization tools.

### Configure production processes

The configuration of production processes in Dynamics 365 Business Central primarily involves setting up production orders, production plans and production routes.

**Production Orders:** These are orders that specify which items are to be produced and when they are to be produced. You can create, edit, and delete production orders in Business Central. You can also specify the materials and resources required for production and track completion times.

**Production Plans:** These are plans that prioritize the production orders in relation to the available materials and resources. In Business Central you can create, edit and delete production plans. You can also prioritize production orders and track completion times.

**Production Routes:** These are steps that must be taken to craft an item. You can create, edit, and delete production routes in Business Central. You can also set the materials and resources required for each step and track the duration of each step.

Other aspects to consider would be managing capacity plans, setting up manufacturing rules and using production planning tools.

### Configure inventory policies

Configuring warehouse policies in Dynamics 365 Business Central enables companies to streamline their warehouse processes and ensure they always have an overview of their stock levels. Some of the key steps in configuring inventory policies are:

**Creating storage locations:** Before you can start configuring storage policies, you must first create storage locations. This can be done in the Storage Locations application. Here you can enter information such as the address of the warehouse, the capacity and the type of warehouse.

**Creating storage bin groups:** Storage bin groups allow you to divide your storage locations into different categories. This can be useful if you want to store specific types of products in specific locations.

**Creating bin combinations:** Bin combinations allow you to reserve specific bin locations for specific products. This can be useful if you want to make sure certain products are always available in a certain location.

**Creating Inventory Rules:** Inventory rules allow you to take specific actions when certain conditions are met. For example, you can create a rule that says that a specific product will be automatically moved to another location when inventory at a specific location falls below a certain threshold.

**Creating Inventory Counts:** Inventory counts allow you to capture the actual inventory at a specific storage location and compare it to the inventory in the system. This can be useful to ensure your stock levels are correct.

**Creating Stock Movements:** Stock movements allow you to move products from one storage location to another. This can be useful to replenish inventory at a specific location or to move products from one storage location to another to optimize inventory costs or allow faster delivery to customers. There are different types of stock movements, such as manual or automated stock movements, which can be configured depending on your needs and processes. In Dynamics 365 Business Central, you can create, manage, and monitor inventory movements using the appropriate settings and functionality in the application.

## [Configure production policies](#)

Configuring production policies in Dynamics 365 Business Central includes setting up production orders, scheduling resources, and managing production sites and routings.

**Set up production orders:** Before you can start production, you must create production orders that describe what products are to be manufactured and in what quantities. These orders can be created manually or generated automatically through the use of sell orders.

**Resource planning:** An important aspect of production policies is planning the resources required for production. This includes the management of work plans, machine capacities and material stocks.

**Plant and routing management:** Another important component of manufacturing policies is plant and routing management. This includes setting up production facilities, assigning work schedules and managing work schedules.

**Monitoring and Reporting:** Finally, you need to monitor how production is going and generate reports to measure and improve performance. This can be done through the use of production reports and dashboards.

It is important to ensure that all production policies and processes are well documented and understandable so that the company can easily track and adapt them as business conditions change.

## 8. Monitoring and Troubleshooting

### Configure monitoring options

When configuring monitoring options in Dynamics 365 Business Central, you can make various settings to monitor your organization's performance and security. Some of the main monitoring options that you can configure are:

**Audit Logging:** This feature allows you to record and track users' activities in the application. You can filter audit logs by user, date, actions, and other criteria to identify potential security issues or unwanted activity.

**Notifications and Alerts:** You can configure notifications and alerts to be informed about specific events in the application, such as a lack of stock or overdue payments. You can also create rules to automatically generate notifications when certain conditions are met.

**Performance Monitoring:** This feature allows you to monitor and optimize the performance of Dynamics 365 Business Central by monitoring the utilization of servers, databases, and other resources. You can also create reports to track and analyze performance over time.

**Security:** Dynamics 365 Business Central offers extensive security features such as access control, password policies and encrypted transmission of data to ensure the data security of your organization. You can also create security policies to control user access rights and prevent potential threats.



**Data integrity:** You can make settings to ensure that the data in your organization is correct and complete, for example by creating rules to validate data input or automatically detecting and avoiding duplicates.

It is important to note that the configuration of the monitoring options may differ depending on your organization's needs and processes. It's a good idea to take the time to explore the different options and decide which ones best suit your business needs. Some of the things you can monitor include finances, inventory levels, sales performance, and customer feedback. It's also important to ensure that monitoring options are regularly reviewed and updated to ensure they always reflect current needs.

### Manage logs and reports

Managing logs and reports is an important part of managing Dynamics 365 Business Central. It allows you to track and analyze transactions, activities and events in your organization.

To manage logs and reports in Dynamics 365 Business Central, you must first set the necessary permissions and access rights for the users who should have access to these functions. You can then create different logs and reports targeting different areas and processes in your organization. This includes finance, sales, marketing, production and warehousing.

Some of the most important logs and reports you can manage in Dynamics 365 Business Central are:

**Financial Logs:** These logs contain information about financial transactions such as invoices, payments, and bank transactions.

**Sales Logs:** These logs contain information about sales activities such as quotes, orders, and invoices.

**Marketing logs:** These logs contain information about marketing activities, such as campaigns, leads, and customer contacts.

**Production Logs:** These logs contain information about production processes, such as work orders, routings, and inventory.

**Stock Logs:** These logs contain information about stock movements, inventory, and storage locations.

You can also create custom reports based on your organization's specific data and needs. These reports can be exported and printed in various formats for use in meetings and presentations.

It is important to regularly review and update the logs and reports to ensure they reflect the current needs and processes of your organization. Effective management of logs and reports can help improve transparency and decision-making in your organization.

## Troubleshoot problems

Troubleshooting is an important part of running Dynamics 365 Business Central. There are several ways to fix problems that you may encounter in the application. One of the first steps in troubleshooting is to determine the nature of the problem and identify the possible causes.

One of the most common troubleshooting methods is to review the Dynamics 365 Business Central logs and reports. These may contain important information that will help identify the problem. They can also contain error codes and other error messages that can help diagnose the problem.

Another important troubleshooting step is to review the Dynamics 365 Business Central configuration and settings. This can help identify and fix possible configuration errors.

Another useful troubleshooting tool is the Microsoft Dynamics 365 Business Central forum. Here you can ask questions and get answers from other users and experts who can help you solve problems.

There is also an option to contact a partner or Microsoft support team who can help you troubleshoot. This can be particularly useful when the problem is complex and the above steps do not provide a solution.

Overall, it's important to take a systematic approach to troubleshooting issues in Dynamics 365 Business Central and rely on the logs, reports, and other resources that are available to resolve issues quickly and effectively.

## 9. Upgrades and Migrations

### Upgrade to newer versions of Dynamics 365 Business Central

Upgrading to a newer version of Dynamics 365 Business Central can be a complex process that requires careful planning and execution. Here are some steps to keep in mind when upgrading:

**Back up your data:** Before you begin the upgrade, it's important to back up all of your data. This backup should contain both the database and all files needed to perform a full recovery in case of failure.

**Check the system requirements:** Make sure your system meets the requirements of the new version. This includes checking RAM, disk space, and other system resources.

**Test the upgrade:** Before you upgrade in your production environment, you should run it in a test environment. This allows you to identify and fix any issues before they occur in the production environment.

**Upgrade your customizations:** If you have made customizations to your current version of Dynamics 365 Business Central, they must be customized before upgrading to the new version. Make sure any customizations you made are compatible with the new version.

**Perform the upgrade:** Once you have completed all the steps, you can upgrade to the new version. This process can take some time depending on the size of your database and the number of customizations you have made.

**Check functionality:** After the upgrade, you should check the functionality to make sure everything is working properly. This should be done in terms of both the built-in features and the customizations you've made.

**Document your steps:** It's important to document all the steps you took during the upgrade so that you can understand exactly what was done and what changes were made in case of any problems. This makes troubleshooting easier and can save time and resources. It's also a good idea to back up your data before upgrading so that you can restore in case of an emergency. It's also a good idea to ensure that any customizations and extensions required by your organization are transferred to the newer version of Dynamics 365 Business Central before performing the upgrade.

## [Migrate from older versions of Dynamics 365 Business Central](#)

Migrating from older versions of Dynamics 365 Business Central is a process of transferring data and configurations from an older version to the latest version. It is important to conduct a comprehensive risk analysis before starting the process to ensure that all data can be transferred successfully.

One of the first steps in migration is to prepare the data. This means that any incomplete or inconsistent data must be cleaned and updated before being transferred to the new version. It is also

important to make a backup copy of all data in order to have a previous version in case of any problems during the process.

After preparing the data, the actual migration process can begin. This process can be done either manually or automatically, depending on your organization's needs and resources. A manual migration typically requires more time and effort, but offers more control and flexibility over how data is transferred. An automated migration, on the other hand, is faster and requires less work, but is typically less flexible.

It is important to ensure data integrity and accuracy during the migration process. It is also important to document all steps performed during the process to have an accurate traceability in case of problems.

After completing the migration process, it is important to thoroughly test the new version of Dynamics 365 Business Central to ensure that all features are working properly and that all data has been transferred correctly. It is also important to educate users about the new features and changes in the new version to ensure a smooth transition.

### [Migrating from other ERP systems to Dynamics 365 Business Central](#)

Migrating data from another ERP system to Dynamics 365 Business Central is a complex process that requires careful planning and preparation. There are different approaches that vary depending on the type and size of your organization and the current ERP system.

A first step in migration is identifying the data to be migrated. This can include, for example, financial data, customer and supplier information, product and inventory levels, and sales and marketing data. It's important to create a complete list of data to be migrated to ensure nothing is forgotten.

Another important step is preparing the data for migration. This may include cleaning and adjusting the data to ensure it meets Dynamics 365 Business Central requirements. It may also be necessary to import data from third party systems that are not part of the current ERP system but are required for the business processes of Dynamics 365 Business Central.

Once the data is ready, the actual migration can begin. This can be done either manually or automatically. With the manual approach, the data is entered into the systems manually, while with the automated approach, special tools are used to transfer the data automatically. It is important to ensure that the data is correct and complete after the migration and to make corrections if necessary.

After the migration, it is important to test and validate the data in Dynamics 365 Business Central. This can be done by creating reports and evaluations and by conducting user acceptance tests. It is also important to ensure documentation and user training to ensure they are able to work with the new system.

Overall, migrating data from another ERP system to Dynamics 365 Business Central is a complex process that requires careful planning and preparation. It is important to thoroughly prepare and test the data to ensure that all data is migrated successfully and that no important information is lost. Experienced support from a Dynamics 365 Business Central partner can be helpful to ensure that the process runs smoothly and that all of the organization's needs are met. It is also important to ensure that the data structures and processes in Dynamics 365 Business Central are adapted to the needs of the organization in order to use the full functionality of the system.

## 10. Advanced Configurations

### [Configure Dynamics 365 Business Central integrations](#)

Configuring integration options in Dynamics 365 Business Central allows you to connect your ERP system with other applications and tools to automate and streamline data and processes. These integration options can come in a variety of forms, such as:

**API integrations:** Dynamics 365 Business Central offers a wide range of APIs that allow developers to integrate data and functions of the ERP system with other applications. For example, an API can be used to automatically import orders from an online shop into the ERP system.

**Integration platforms:** There are also specialized integration platforms that make it possible to connect Dynamics 365 Business Central with other applications. These platforms usually provide preconfigured integration scenarios and a user-friendly interface to configure the integrations.

**Database integrations:** In some cases it can make sense to access the Dynamics 365 Business Central database directly to export or import data into another application or tool.

It's important to note that configuring integration options in Dynamics 365 Business Central depends on your organization's needs and processes. Therefore, before you start the configuration, you should conduct a thorough analysis to ensure that the chosen integration options meet the needs of your organization. It's also important to test thoroughly to ensure that the integration options work as expected and don't cause problems.

### [Configure Dynamics 365 Business Central workflows](#)

Configuring Dynamics 365 Business Central workflows allows you to set up automated processes within your organization. This can help increase efficiency, reduce errors, and improve collaboration.

To configure Dynamics 365 Business Central workflows, you must first create a list of processes that you want to automate. This can include tasks such as approving invoices, monitoring stock levels, and preparing quotes. Once you have identified the processes, you need to decide which steps in each process to automate and what user involvement is required.

After you have defined the processes and steps, you can start creating the workflows. Dynamics 365 Business Central offers an easy-to-use workflow design interface that allows you to add steps, make decisions, and configure notifications. You can also define rules that determine when a workflow starts and when it ends.

It is important to thoroughly test the configured workflows before rolling them out in your organization. This can help identify issues and ensure workflows are working as expected.

Once set up, Dynamics 365 Business Central workflows can help increase efficiency, reduce errors, and improve collaboration. They can also be adjusted at any time to adapt to changing requirements.

### [Configure Dynamics 365 Business Central custom solutions](#)

Configuring custom solutions in Dynamics 365 Business Central allows you to tailor the software to the specific needs of your organization. Custom solutions allow you to add additional fields, tables, and functionality required by your business processes.

The first step in configuring custom solutions is identifying your organization's needs. This can be done by interviewing users, analyzing business processes and examining reports. After the requirements have been identified, you need to consider what type of custom solutions are required to meet those requirements.

After identifying the type of custom solutions needed, development can begin. This can be done either by an in-house development team or by a third party. During development, it is important to thoroughly test the solutions to ensure they are working properly and meeting requirements.

Once the custom solutions have been developed and tested, they can be deployed to the production environment. Here it is important to create a detailed rollout plan and ensure that all users are sufficiently trained to use the new functions.

It's also important to regularly monitor and maintain the custom solutions to ensure they continue to function properly and meet requirements. This can be done by conducting user feedback sessions, monitoring error logs and performing maintenance.

## Configure Dynamics 365 Business Central reporting and analysis options

Configuring reporting and analysis options in Dynamics 365 Business Central enables you to collect, analyze, and report on key business data. This can help you make decisions, identify problems, and develop solutions.

One of the first steps in configuring reporting and analysis options is to collect the data you need. This can be done using standard reports or custom reports. Standard reports are included with Dynamics 365 Business Central and cover commonly used requirements. However, custom reports can be created to meet specific organizational needs.

After the required data has been collected, it can be analyzed. Dynamics 365 Business Central offers various analysis tools such as pivot tables and charts that allow you to explore and visualize the data. These tools make it possible to recognize trends, identify problems and develop solutions.

Another important step in configuring reporting and analysis options is generating reports. Dynamics 365 Business Central offers various report types such as table reports, list reports and forms that allow the data to be presented in a readable form. These reports can be exported in various formats to share with others.

It is also important to ensure that the reporting and analysis options are appropriate to the organization's needs and are updated regularly. This can be done by reviewing the reports and performing analysis to ensure the data is current and accurate.

Finally, it is important to ensure the security of the reporting and analysis options. This can be achieved by using access rights and roles to ensure only authorized individuals can access the data.

Overall, configuring reporting and analysis options in Dynamics 365 Business Central is an important step in improving the performance of your business. It allows you to collect, analyze and visualize key business data to make informed decisions. It's important to choose the right reporting and analysis options for your specific business processes and needs to ensure you're getting the data you need to be successful.

## imprint

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