

Microsoft Dynamics 365 Business Central Capabilities Guide



Go beyond the limits of your basic accounting software with Microsoft Business Central

Microsoft Dynamics 365 Business Central is the business management software solution that connects people and processes like no other by turning your current disconnected systems into one.

Make ordering, selling, invoicing and reporting a doddle, and increase efficiency with automated tasks and workflows using familiar tools such as Outlook and Word.

With MS D365 Business Central you're able to make better informed business decisions because you will now have access to the analytics and intelligence you need quickly and easily, and with cloud deployment you can make changes and adaptations to the system without involving your IT team.

Another fantastic thing about Microsoft Dynamics 365 Business Central is that you start off with only the functionality you need. As your business grows you simply add what you need to your existing set-up. This makes D365 Business Central not only cost effective, but a robust solution that will evolve along with your business.



Business Central Essentials

Financial Management

Make informed decisions

Connect data across accounting, sales, purchasing, inventory, and customer interactions to get an end-to-end view of your business. Chart financial performance in real time with built-in Power BI dashboards.

Accelerate financial close and reporting

Streamline accounts receivables and payables, and automatically reconcile accounts to close and report on financials quickly and accurately, while maintaining compliance.

Improve forecast accuracy

Refine financial forecasts by modelling and analysing data across multiple dimensions. Customize reports using seamless Microsoft Excel integration.

Basic General Ledger

Set up a company and start posting to the general ledger, chart of accounts, general journals, VAT facilities, recurring journals, and source codes.

Budgets

Work with budgets in general ledger accounts.

Deferrals

Set up deferral templates that automate the process of deferring revenues and expenses over a pre-defined schedule.

Basic fixed assets

Keep track of fixed assets and related transactions such as acquisitions, depreciations, write-downs, appreciations, and disposals.

Basic receivables

Post sales transactions in journals and manage receivables; register customers and manage receivables using general journals.

Dimensions

Add unlimited dimensions to any ledger for advanced transaction analyses.

Audit trails

Automatically assigns audit trails and posting descriptions to every transaction. In addition, users can define reason codes to create complementary audit trails.

Bank account management

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

Reconciliation

Reconcile your bank statement data automatically to open bank account ledger entries end to keep track of all your bank statements.

Currencies

Manage multiple currencies throughout the system, including payables and receivables, general ledger reports, resource and inventory items, and bank accounts.

Business Central Essentials

Automate and Secure Supply Chain Management

Optimize inventory levels

Use built-in intelligence to predict when and what to replenish. Purchase only what you need with dynamically updated inventory levels.

Avoid lost sales and reduce shortages

Maintain the right amount of inventory by automatically calculating stock levels, lead times, and reorder points. Suggest substitutes when requested items are out of stock.

Maximize profitability

Get recommendations on when to pay vendors to use vendor discounts or avoid overdue penalties. Prevent unnecessary or fraudulent purchases through approval workflows.

Sales order management

Manage sales orders, blanket sales orders, and sales order processes.

Purchase order management

Manage purchases, blanket orders, and purchase order processes.

Warehouse management (Basic and Advanced)

Warehouse functionality in Business Central can be implemented in different complexity levels, depending on a company's processes and order volume. The main difference is that activities are performed order-by-order in basic warehousing when they are consolidated for multiple orders in advanced warehousing.

Item transfers

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

Locations

Manage inventory in multiple locations that may represent a production plan, distribution centre, warehouse, showroom, retail outlet or service car.

Assembly Management

To support companies that supply products to their customers by combining components in simple processes without the need of manufacturing functionality, Business Central includes features to assemble items that integrate with existing features, such as sales, planning, reservations and warehousing.

Business Central Essentials

Project Management

Stay on 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.

Plan with precision

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

Analyze project performance

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

Resources

Register and sell resources, combine related resources into one resource group or track individual resources.

Estimates

Monitor resource usage and get a complete overview of your capacity for each resource with information about availability and planned costs on orders and quotes.

Jobs

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

Timesheets

Timesheets are a simple and flexible solution for time registration with manager approval and integrate with Service, Jobs, and Basic Resources.

Multiple languages

Switch languages on the client in real time provided that the desired language is available.

Reason codes

Define a set of reason codes that can be assigned to individual transactions throughout the system, providing user-defined audit trails.

Extended text

Set-up an unlimited number of lines to describe inventory items, resources, and general ledger accounts.

Intrastat reporting

Automatically retrieve the necessary data to report Intrastat information to statistics authorities. Local customs authorities can inform you whether your company is obligated to file such a report.

Outlook integration

Synchronize your to-do items and your contacts with your meetings, tasks, and contacts in Outlook.

Business Central Essentials

Human Resources (Basic) Dynamics 365 for Talent is additional

Employees

Group and track employee information and organise employee data according to different types of information, such as experience, skills, education, training and union membership.

Expense Management

Post expenses against employee cards to track and reimburse their expenses.

Microsoft Dynamics 365 for Talent

Dynamics 365 for Talent is a full HR solution which allows you to transform the candidate and employee experience. Dynamics 365 for Talent uses the power of Office 365 and LinkedIn to attract, hire, on-board and retain talented people.

Dynamics 365 for Talent is an additional platform and is not included within Dynamics 365 Business Central.

Business Central Essentials

Customer Relationship Management (Basic)

Deliver value at every touch point

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 your sales cycle.

Boost sales productivity

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

Maximize profitability

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

Contacts

Maintaining an overview of your contacts and record your contact information for all business relationships.

Campaign

Organize campaigns based on segments of your contacts that you define.

Opportunity management

Keep track of sales opportunities, section your sales processes into different stages, and use this information to manage your sales opportunities.

Dynamics 365 for Sales integration

Integrate with Dynamics 365 for Sales in a few easy steps to synchronize your data, including sales orders, item availability, units of measure, and currencies.

Business Central Premium

Service Order Management

Manage forecasting to fulfilment

Use sales forecasts and expected stock-outs to automatically generate production plans and create purchase orders.

Run your warehousing efficiently

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

Reach optimal output levels

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

Service orders

Register your after-sales issues including service requests, services due, service orders, and repair requests.

Service item management

Record and keep track of all your service items, including contract information, component management, and BOM reference and warranty information.

Service contract management

Record details on service levels, response times, and discount levels, as well as on the service history of each contract, including used service items and parts and labour hours.

Planning

Assign personnel to work orders and log details such as work order handling and work order status.

Dispatching

Manage service personnel and field technician information, and filter according to availability, skills, and stock items.

Service price management

Set-up, maintain, and monitor your service prices.



experts

We Know How



Business Central Premium

Manufacturing

Resources

Register and sell resources, combine related resources into one resource group or track individual resources.

Estimates

Monitor resource usage and get a complete overview of your capacity for each resource with information about availability and planned costs on orders and quotes.

Jobs

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

Timesheets

Time sheets are a simple and flexible solution for time registration with manager approval and integrate with Service, Jobs, and Basic Resources.

Multiple languages

Switch languages on the client in real time provided that the desired language is available.

Reason codes

Define a set of reason codes that can be assigned to individual transactions throughout the system, providing user-defined audit trails.

Extended text

Set-up an unlimited number of lines to describe inventory items, resources and general ledger accounts.

Intrastat reporting

Automatically retrieve the necessary data to report Intrastat information statistics authorities. Local customs authorities can inform you whether your company is obligated to file such a report.

Outlook integration

Synchronize your to-do items and your contacts with your meetings, tasks and contacts in Outlook.

Subcontracting

Allows companies to send raw materials, unfinished goods, or partially finished goods for further processing elsewhere.



NAV Experts
Unit 5 Britannia Court
Basildon
Essex
SS13 1EU

+44 (0) 1268 724005

TalkToUs@NAVExperts.co.uk