



Share your photos to
the conference album!

EMPOWERED

USER
CONFERENCE
2023

EMPOWERED

USER CONFERENCE 2023

AUTOMATING AND OPTIMIZING
BUSINESS CENTRAL ACTIVITY

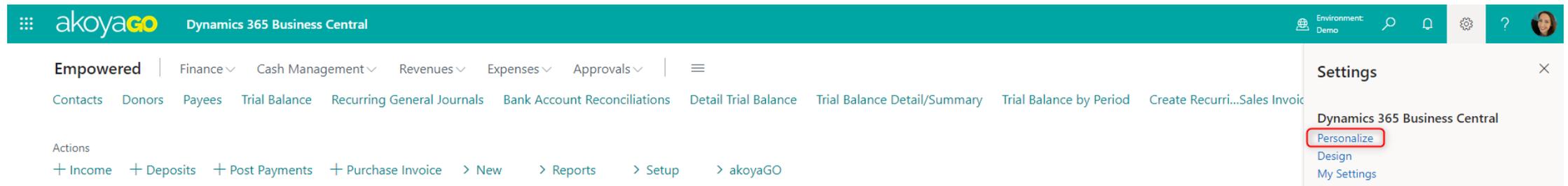
PRESENTED BY
MEGHAN DAVIGNON

PERSONALIZATION

Personalize the layout of
Business Central

PERSONALIZATION

- Most screens in Business Central can be personalized
 - Personalize screens to:
 - Reduce clicks
 - Prioritize key information
- To start personalization:
 1. Select the settings gear
 2. Choose “Personalize”



PERSONALIZATION

- Personalize Views
 - Change column order/size
 - Hide columns
 - Add additional columns
- Personalize Cards/Forms
 - Re-order data fields
 - Hide unused data fields
 - Add additional data fields (existing fields)
 - Promote menu items

PURCHASE INVOICES

Streamline entering accounts
payable

RECURRING PURCHASE LINES

- Use Recurring Purchase Lines to facilitate the creation of Purchase Invoices
- Store details including:
 - Description
 - G/L account
 - Fund/Department
 - Function

Standard Purchase Code Card ✎ 📄 + 🗑️ ✓ Saved 🔗 🔗

PRINTING · Printing and copying

General

Code Currency Code

Description

Lines | Manage | Line | Fewer options 🔗 🔗

Type	No.	Description	Quantity	Fund	Department
→ G/L Account	5220	Printing & Copying	1	00001	01

RECURRING PURCHASE LINES

Link to a vendor/payee

V00290 · FedEx Office

✓ Saved



Recurring Purchase Lines

Search



Analyze

+ New

Edit List

Delete

Card



Code ↑	Description	Insert Rec. Lines On Quotes	Insert Rec. Lines On Orders	Insert Rec. Lines On Invoices	Insert Rec. Lines On Cr. Memos
→ PRINTING	⋮ Printing and copying	Manual	Manual	Automatic	Manual

COPY PURCHASE INVOICE

- Copy an existing Purchase Invoice
 - Create a new purchase invoice
 - Select a Vendor
 - Choose “Copy Purchase document”
 - Select the Document No. to copy
 - Always Include Header to maintain dimensions

Copy Purchase Document

Options

Document Type	Posted Invoice	▼
Document No.	108082	...
Doc. No. Occurrence		
Version No.		
Buy-from Vendor No.	V00270	
Buy-from Vendor Name	Sunrise Water	
Include Header	<input checked="" type="checkbox"/>	
Recalculate Lines	<input type="checkbox"/>	

OK

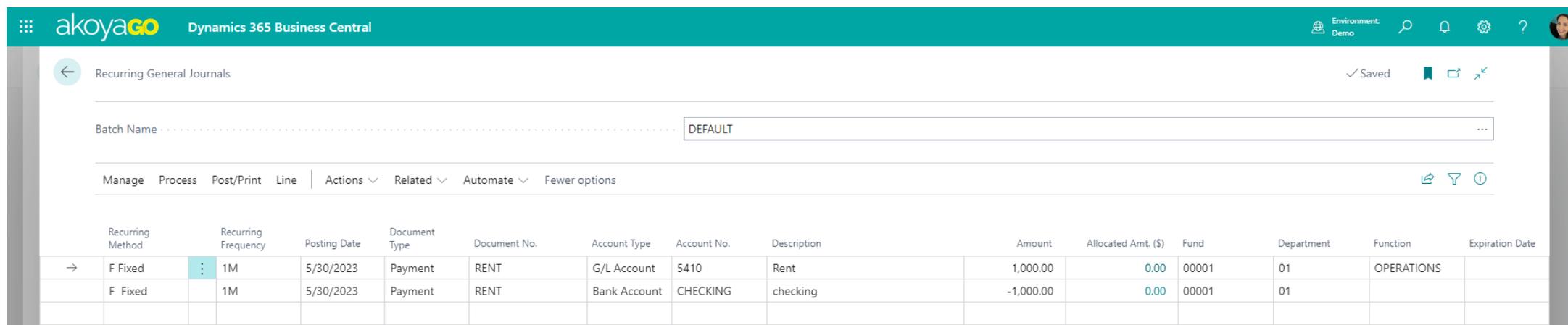
Cancel

RECURRING JOURNALS

Automate recurring journal entries

RECURRING JOURNALS

- Recurring journals are similar to regular general journals, but they are not deleted after posting
- They automatically advance in posting date based on the specified frequency



The screenshot displays the 'Recurring General Journals' form in Dynamics 365 Business Central. The 'Batch Name' field is set to 'DEFAULT'. Below the form is a table with two journal lines. The first line is a debit entry for 'Rent' with an amount of 1,000.00. The second line is a credit entry for 'checking' with an amount of -1,000.00. Both lines have a recurring frequency of '1M' and a posting date of '5/30/2023'.

Recurring Method	Recurring Frequency	Posting Date	Document Type	Document No.	Account Type	Account No.	Description	Amount	Allocated Amt. (\$)	Fund	Department	Function	Expiration Date
→ F Fixed	1M	5/30/2023	Payment	RENT	G/L Account	5410	Rent	1,000.00	0.00	00001	01	OPERATIONS	
F Fixed	1M	5/30/2023	Payment	RENT	Bank Account	CHECKING	checking	-1,000.00	0.00	00001	01		

RECURRING JOURNALS

- Recurring journals can also be used to allocate expenses (example: across multiple departments)
- Under Process > Allocations, set the spread

← Recurring General Journals ✓ Saved

Batch Name:

Manage Process Post/Print Line Actions Related Automate Fewer options

Recurring Method	Recurring Frequency	Posting Date	Document Type	Document No.	Account Type	Account No.	Description	Amount	Allocated Amt. (\$)	Fund	Department	Function	Expiration Date
→ B Balance	1Q	3/31/2023		ALLOCATION	G/L Account	5210	Office Supplies	0.00	0.00	00001	01		

← Allocations ✓ Saved

Manage Dimensions More options

Account No.	Account Name	Fund	Department	Function	Allocation %	Amount
→ 5210	Office Supplies	00001	01	FUNDRAISING	33.00	0.00
5210	Office Supplies	00001	01	GRANTPROG	33.00	0.00
5210	Office Supplies	00001	01	OPERATIONS	34.00	0.00

DATE FORMULAS

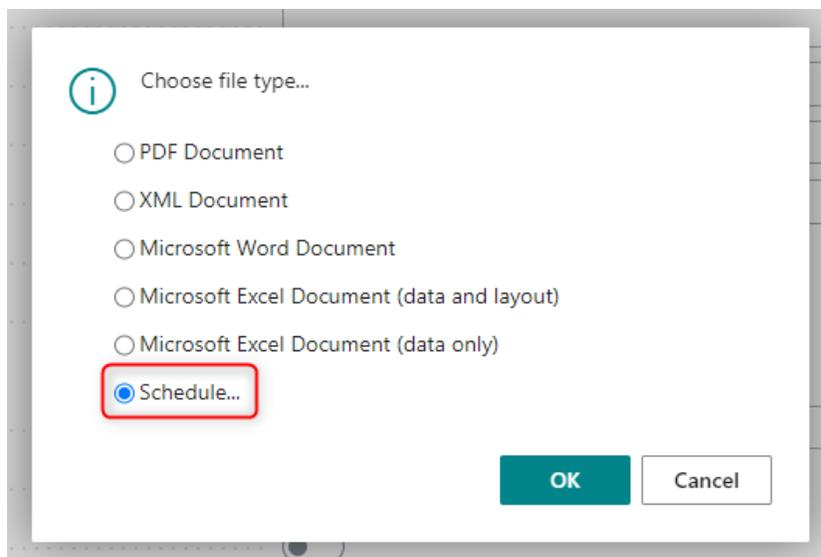
Date	Date Formula	Result	Meaning
20-Apr-22	CM	31 Apr 2022	End of Month
20-Apr-22	-CM	1-Apr-22	Beginning of Month
20-Apr-22	1M	20-May-22	Plus 1 Month
20-Apr-22	1M+CM	5-May-22	End of Next Month
20-Apr-22	CM+D25	25-May-22	Day 25th of the following month
20-Apr-22	CM+45D	14-Jun-22	45 Days after End of Month
20-Apr-22	7D	27-Apr-22	Plus 7 Days
20-Apr-22	D7	7-May-22	The next Day 7th
20-Apr-22	D25	25-Apr-22	The next Day 25th
20-Apr-22	-D10	10-Apr-22	The previous Day 10th
20 Apr 2022 (Wed)	WD1	25-Apr-22	The next Week Day 1: Monday
20 Apr 2022 (Wed)	WD6	23-Apr-22	The next Week Day 6 : Saturday
20-Apr-22	1Q+1M+CM	31-Aug-22	Plus 1 Quarter and 1 Month, End of Month
20-Apr-22	1Y-CY	1-Jan-23	Beginning of Next Year
20-Apr-22	CY+1D	1-Jan-23	Beginning of Next Year
20 Apr 2022 (Wed)	CW	24-Apr-23	End of this week (Sunday)
30-Jan-22	1M	28-Feb-22	Next month (February 2022 only has 28 days)

SCHEDULED REPORTS

Automate report generation

SCHEDULED REPORTS

- Automatically generate reports and send them to the Report Inbox
- When printing a report choose “Send To...”



SCHEDULED REPORTS

- Find reports listed in the “Report Inbox” on the dashboard once they’ve been run
- Manage scheduled reports by searching for them in the “Job Queue Entries”

Report Inbox

Description	Created Date-Time ↓	Output Type
akoyaGO Financial Report	7/24/2023 11:34 AM	PDF

Job Queue Entries

Search Analyze + New Edit List Delete Edit View

Status ▼	User ID	Object Type to Run	Object ID to Run	Object Caption to Run	Description
Ready	ALYSON	Report	1511	Delegate Approval Requests	Auto-cre
Ready	ALYSON	Codeunit	6700	O365 Sync. Management	Auto-cre
Ready	ALYSON	Codeunit	1350	Telemetry Management	
Ready	ALYSON	Codeunit	1281	Update Currency Exchange Rat...	Bank of C
Ready	SYSTEM	Codeunit	5339	Integration Synch. Job Runner	PAYMEN
Ready	SYSTEM	Codeunit	5339	Integration Synch. Job Runner	SHIPMEI
Ready	SYSTEM	Codeunit	5339	Integration Synch. Job Runner	SHIPPIN
→ Ready	MEGHAN	Report	50502	akoyaGO Financial Report	akoyaGO

THANK YOU

Presented By

Meghan Davignon
Director, Client Services



Share your photos to
the conference album!

EMPOWERED

USER
CONFERENCE
2023