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AUTOMATING AND OPTIMIZING BUSINESS CENTRAL ACTIVITY

PRESENTED BY
MEGHAN DAVIGNON

akoyaGO

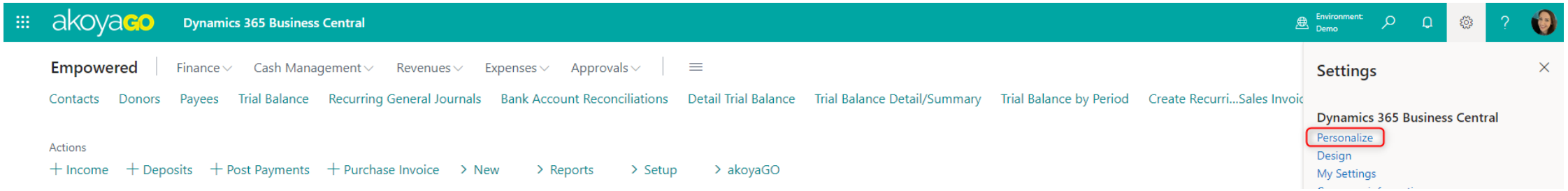
PERSONALIZATION

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

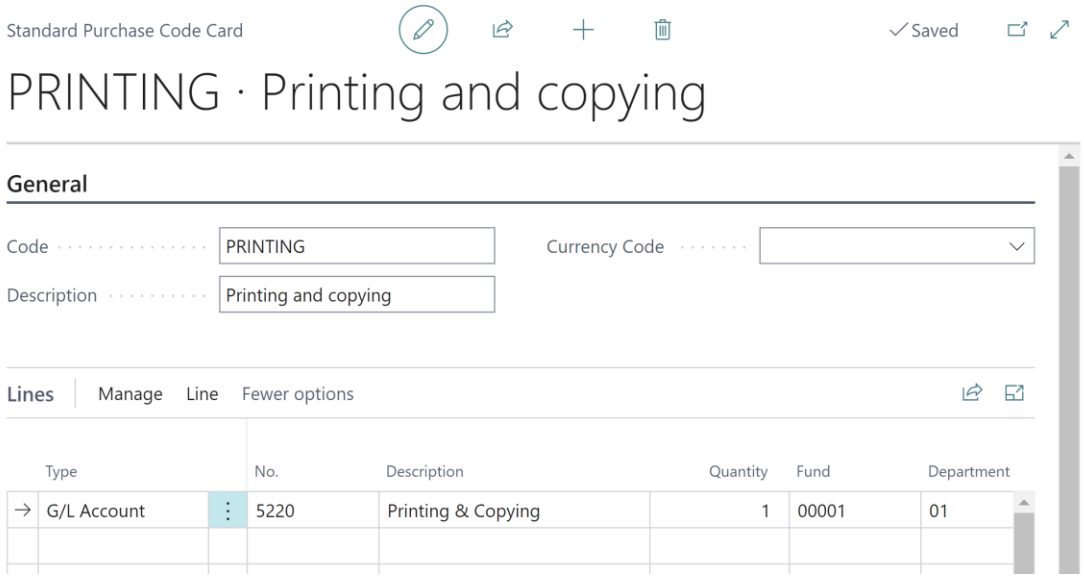
PURCHASE INVOICES

Streamline entering accounts payable

RECURRING PURCHASE LINES

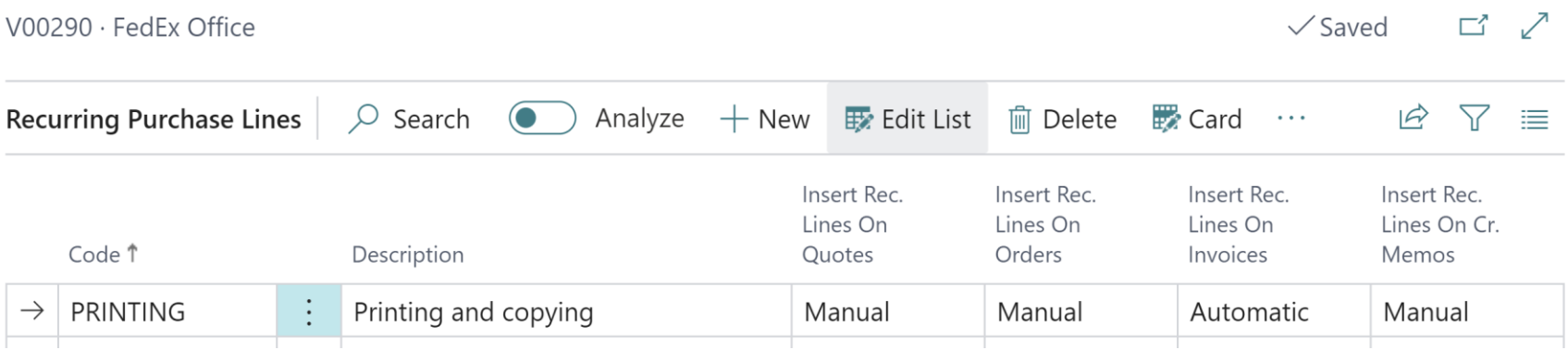
- Use Recurring Purchase Lines to facilitate the creation of Purchase Invoices

- Store details including:
  - Description
  - G/L account
  - Fund/Department
  - Function



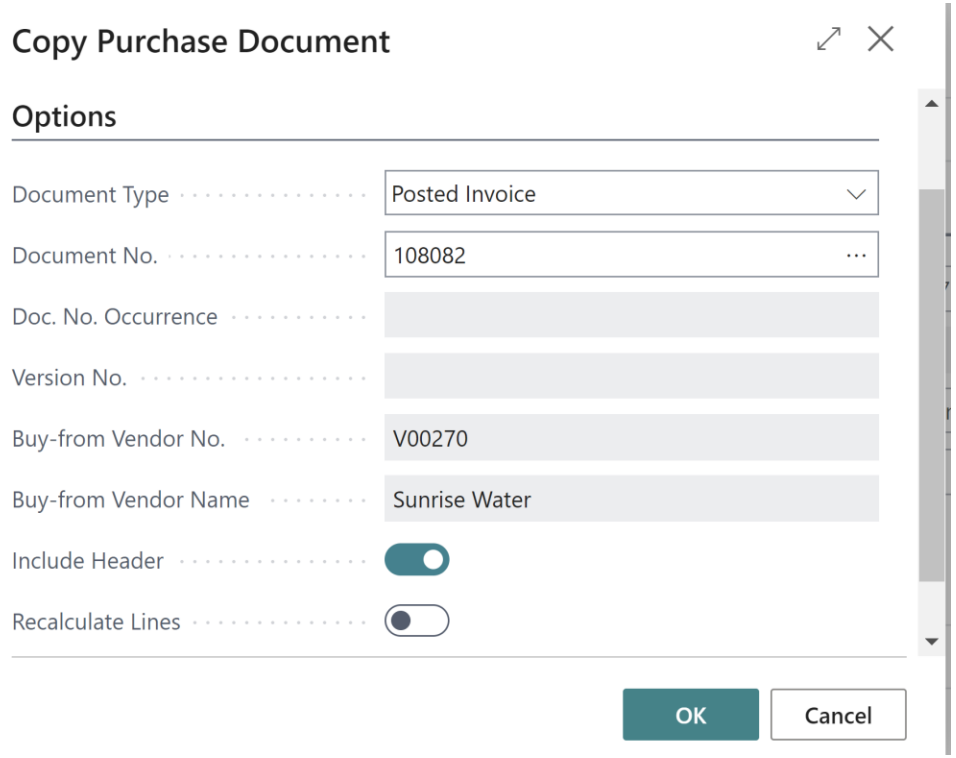
RECURRING PURCHASE LINES

Link to a vendor/payee



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

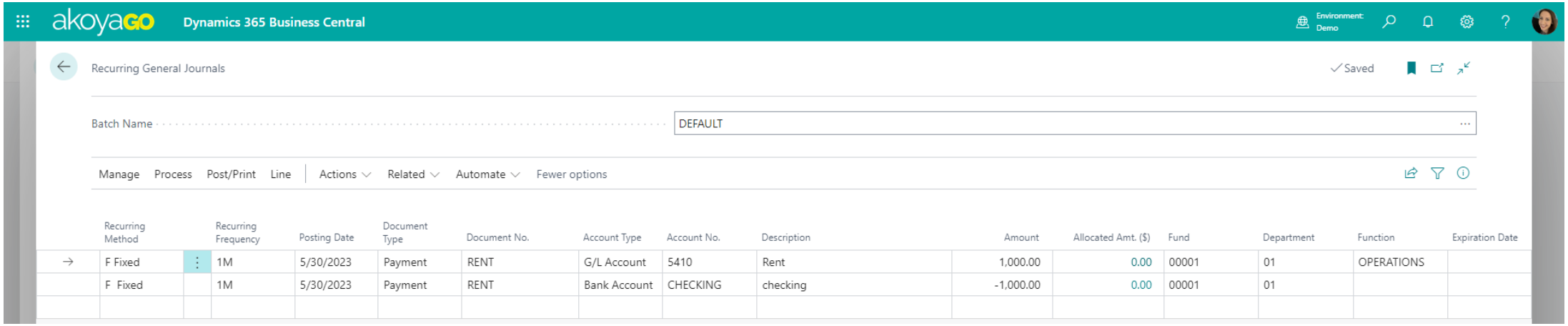


RECURRING JOURNALS

Automate recurring journal entries

RECURRING JOURNALS

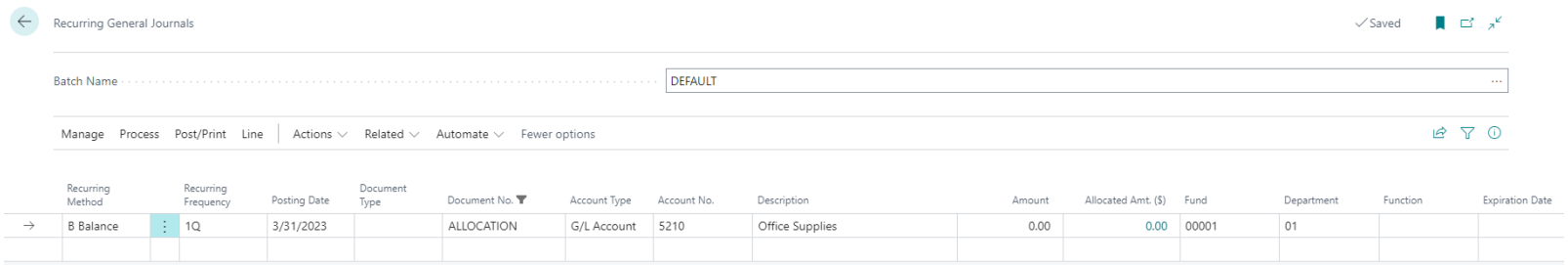
- Recurring journals are similar to regular general journals, but they are not deleted after posting
- They automatically advance in posting date based on the specified frequency



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 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		

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

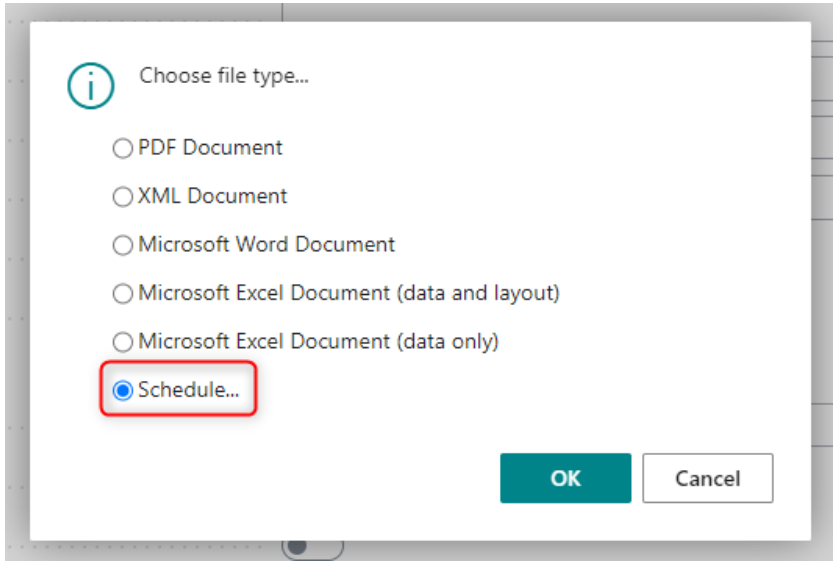
Date	Date Formula	Result	Meaning
20-Apr-22	CM	31 Apr 2022	End of Month
20-Apr-22	-CM	1-Apr-22	Beginning of Month
20-Apr-22	1M	20-May-22	Plus 1 Month
20-Apr-22	1M+CM	5-May-22	End of Next Month
20-Apr-22	CM+D25	25-May-22	Day 25th of the following month
20-Apr-22	CM+45D	14-Jun-22	45 Days after End of Month
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)

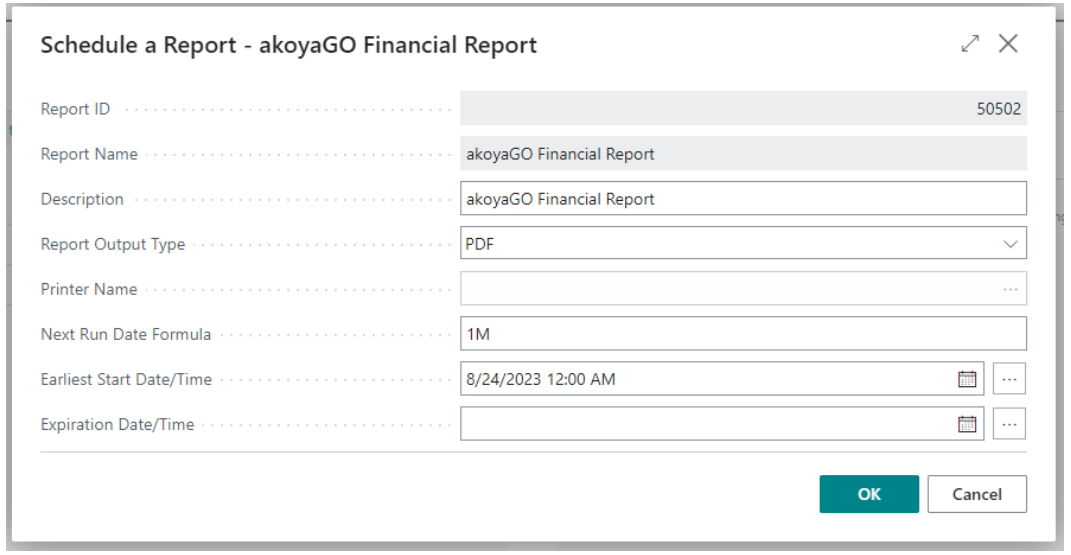
SCHEDULED REPORTS

Automate report generation

SCHEDULED REPORTS

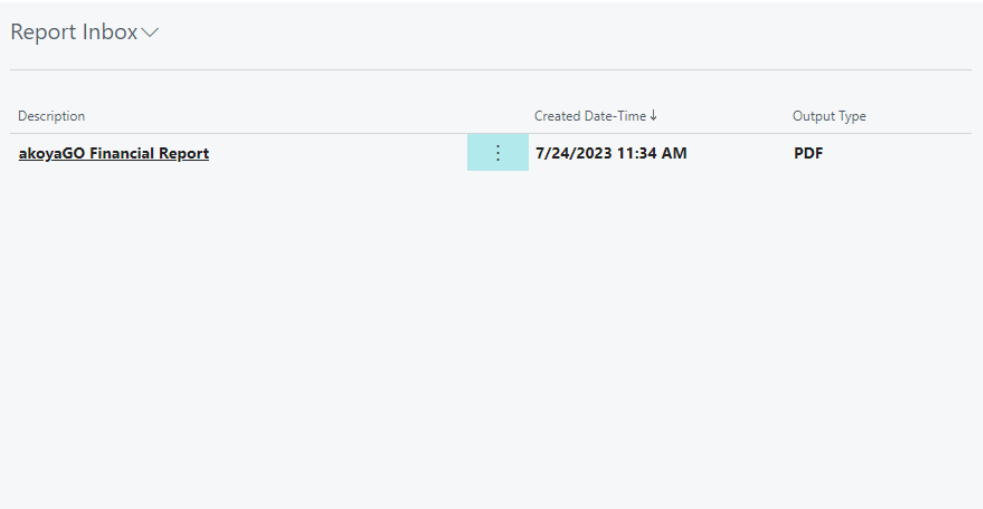
- Automatically generate reports and send them to the Report Inbox
- When printing a report choose “Send To…”

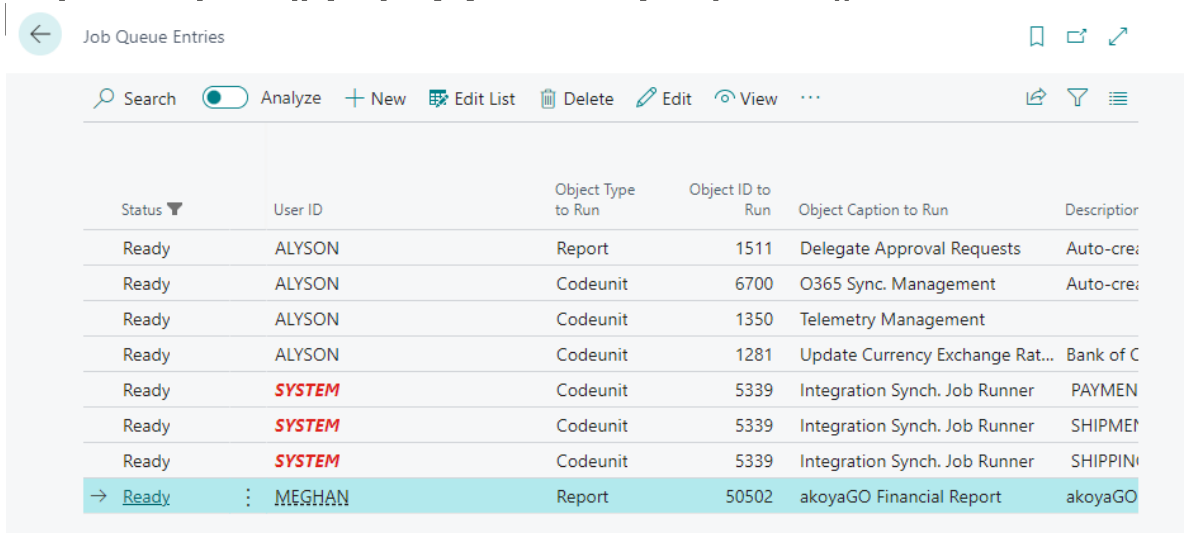




SCHEDULED REPORTS

- Find reports listed in the “Report Inbox” on the dashboard once they’ve been run
- Manage scheduled reports by sea





THANK YOU

Presented By

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