Hougaard.com – Applied Hacking
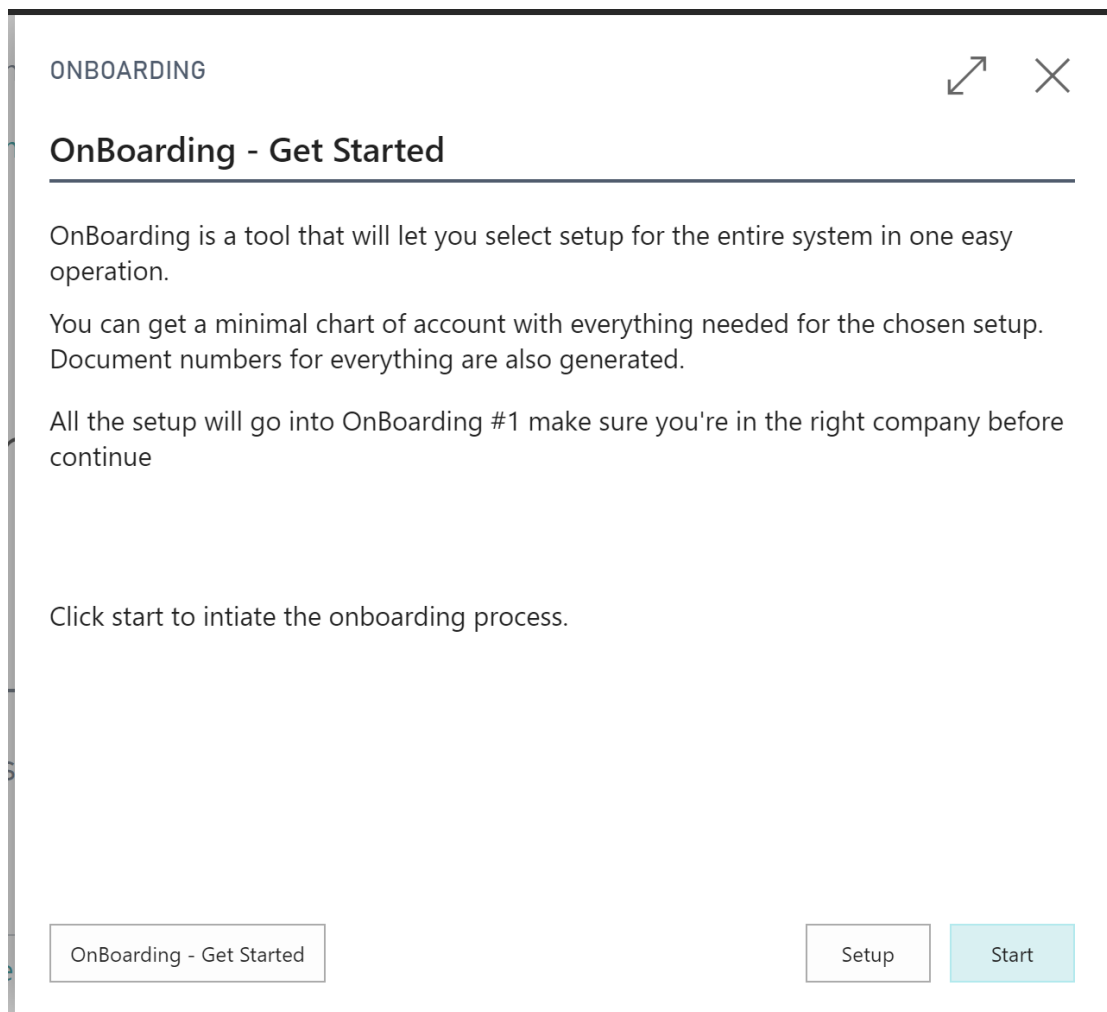
An adventure in Microsoft Dynamics Business Central, NAV, .NET and other technologies

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OnBoarding for Business Central

OnBoarding is a feature for Business Central to quickly create a working setup.

ONBOARDING   ⤢   ✕

OnBoarding - Get Started

OnBoarding is a tool that will let you select setup for the entire system in one easy operation.

You can get a minimal chart of account with everything needed for the chosen setup. Document numbers for everything are also generated.

All the setup will go into OnBoarding #1 make sure you're in the right company before continue

Click start to intiate the onboarding process.

| OnBoarding - Get Started | Setup | Start |

ONBOARDING ↗ ✕

Select the Modules you want setup for

SELECT		DESCRIPTION
☑	⋮	Base Setup
☐		Financial Management
☐		Sales and Account Receivables
☐		Purchase and Account Payables
☐		Inventory
☐		Jobs
☐		Fixed Assets
☐		Warehouse
☐		Service Management
☐		Relationship Management
☐		Human Resources
☐		Production and Planning

Select the Modules you want setup for		Back	Continue to next step

ONBOARDING   ↗   ✕

Select packages for module

| Module | · · · · · · · · · · · · · · · · · · · | **Base Setup** |

SELECT			DESCRIPTION	COUNTRY
☐	⋮		Base Setup CA	CA
☐			Base Setup MX	MX
☐			Base Setup US	US

| Select packages for module | | Back | Continue to next step |

ONBOARDING   ↗   ✕

Select packages for module

| Module | · · · · · · · · · · · · · · · · · | **Financial Management** |

SELECT		DESCRIPTION
☑	⋮	Finance Management Setup CA
☐		Simplified Finance Management Setup CA
☐		Account Schedule: Capital Structure
☐		Account Schedule: Balance Sheet
☐		Account Schedule: Campaign Analysis
☐		Account Schedule: Cost Acct. Summary Record DB pe…
☐		Account Schedule: Cash Flow Statement
☐		Account Schedule: Calculation Of Cash Flow
☐		Account Schedule: Cost Acct. Personnel Costs
☐		Account Schedule: Cost Acct. Transfer

| Select packages for module | | Back | Continue to next step |

ONBOARDING STEP 3   ↗ ✕

How do you want your Chart Of Accounts

Chart Of Account Action · · · · · · · · ·	Generate one for me ▾

AUTOGENERATION PARAMETERS

First Account Number · · · · · · · · · ·	1000
Account Number Increment · · · · · ·	10
Create Chart Of Account Totals · · · ·	⬤━
Total Accounts Increment · · · · · · · ·	100

How do you want your Chart Of Accounts		Back	Continue to next step

ONBOARDING STEP 7   ↗   ✕

How do you want your documents numbered

Document numbering action · · · · · · | Generate them for me   ▾ |

AUTOGENERATION PARAMETERS

First Number · · · · · · · · · · · · · · · · · | 1000 |

| How do you want your documents numbered | | Back | | Continue to next step |

ONBOARDING, DOCUMENT NUMBERS

↗ ✕

START NUMBER		DOCUMENT TYPE
BRA1000	⋮	**Bank Rec Adjustment**
BD1000		**Bank Deposit**
B1000		**BANK**

Back   Continue

ONBOARDING – REVIEW AND FINISH ↗ ✕

Review and Finish

Now we're ready to finish this, the following will happened:

1. All the Setup in packages chosen will be generated

2. The Chart Of Account will be created if chosen

3. The Setup in all packages will use the new Account Numbers.

4. Create the numbers as specified and reference them in the setup.

| Review and Finish | | Back | Review | Create Everything |

Edit

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