

Microsoft Dynamics 365 Business Central



Capability and Toolset Guide



Microsoft Dynamics 365 Business Central is a comprehensive business management solution that fits the needs of small-to-midsize companies. As Microsoft’s modern ERP in the cloud (on-premise is also available), it helps organizations connect their financials, sales, purchasing, inventory, projects, service, manufacturing, and operations. It can be licensed two ways, each comprising a series of modules:

Dynamics 365 Business Central

-  An all-in-one business management solution
-  An evolution of Dynamics NAV
-  An intelligent and unified solution
-  A member of the Dynamics 365 family
-  An application and a platform

Dynamics 365 Business Central Essential:

- Financial Management
- Customer Relationship Management
- Project Management
- Supply Chain Management
- Warehouse Management
- Human Resources Management

Dynamics 365 Business Central Premium:

- Everything in Essential
- Service Management
- Manufacturing

Dynamics 365 Business Central is particularly suited for companies that are stretching the limits of QuickBooks, including nonprofits, or ones in the distribution or manufacturing industries. With **Progressus** or **ProjectPro**, it is a powerful solution for professional services and construction.

Available in a true, multi-tenant **Cloud** environment or **On-premise**, Business Central’s foundation is Microsoft Dynamics NAV. All the functionality found in Dynamics NAV, is available out-of-the-box in Business Central. As a member of the Dynamics 365 family, Business Central has powerful integrations with the Microsoft software you already use and other Microsoft tools, including Office 365, Outlook, **Power BI Dashboards**, **Microsoft Flow**, and, **PowerApps**.

Deploy a single, comprehensive solution

 Financial management	Account receivables/ payables	Bank reconciliation	Fixed asset management	Month/Year end closing
 Sales & service management	Quote generation	Contact management	Sales invoicing	Payment processing
 Project management	Capacity planning	Budgets and estimates	Job and process costing	Resource management
 Supply chain management	Inventory and Purchasing control	Shipment and distribution	Returns and cancellations	Procurement and vendor management
 Operations management	Forecasting	Production planning	Manufacturing capacity	Warehouse management
 Reporting & analytics	Customer insights	Self-serve reports	Interactive dashboards	Built-in intelligence

Intelligent business applications in the cloud

Microsoft AppSource

 Office 365



MICROSOFT DYNAMICS 365
Business Central

 Power BI

Cortana
Intelligence

Azure IoT

Common application platform: PowerApps, Microsoft Flow, Common Data Service

Multiple deployment options: On-premise, Hybrid, Cloud

Functionality in Essential Licensing

Financial Management Series - Business Central streamlines accounts receivables and payables and automatically reconciles accounts to close and report on financials quickly and accurately, while maintaining compliance. You can refine financial forecasts by modeling and analyzing data across multiple dimensions. Using seamless Microsoft Excel integration, you can easily customize reports. Modules include:

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.

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

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

Advanced Dimensions - Add unlimited dimensions to any ledger for advanced transaction analyses.

Audit Trails

The system 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 and keep track of all your bank statements.

Multiple Currencies

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

All Financial Management Modules:

Financial Management		
Basic General Ledger	Basic Fixed Assets	Electronic Payment / Direct Debits*
Allocations	Insurance	Bank Account Reconciliation
Budgets	Maintenance	Payment Handling
Account Schedules	Fixed Assets Allocations	Cash Flow Forecast
Consolidation	Reclassifications	Advanced Dimensions
Basic XBRL	Bank Account Management	Deferrals
Change Log	Check Writing	Multiple Currencies
Advanced Financial Management		
Responsibility Centers	Inter-company Postings	Cost Accounting

Customer Relationship Management Series - You can 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. The CRM series accelerates the quote to cash process. Act quickly on sales-related inquiries, manage service requests, and process payments—**all from within Outlook!**

Moreover, you can gain a comprehensive overview of your service tasks, workloads, and employee skills to effectively assign resources and accelerate case resolution. Modules include:

Contact Management

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

Campaign Management

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

This integration synchronizes your data, including sales orders, item availability, units of measure, and currencies.

All CRM Modules:

Customer Relationship Management		
Contact Management	Dynamics 365 for Sales and Dynamics 365 for Customer Service	
Task Management	Opportunity Management	Campaign Management
Outlook Client Integration	Interaction / Document Management	Relationship Management
Contact Classification	Mail Logging	Notifications

Project Management Series - You can create, manage, and track customer projects using timesheets along with advanced job costing and reporting capabilities. You develop, modify, and control budgets to ensure project profitability.

You plan with precision when you manage resource levels by planning capacity and sales. Track invoicing for customers against planned costs on orders and quotes. How is your project performance? You can know and make effective decisions with real-time insight on project status, profitability, and resource-usage metrics. Project Management modules include:

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

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

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.

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

All Project Management Modules:

Project Management		
Basic Resources	Estimates	Time Sheet
Capacity Management	Tasks / Steps	User Tasks
Multiple Costs	Jobs	

Advanced Projects Extensions - Professional Services Firms can get advanced projects capability through the **Progressus Projects** extension. Construction firms can get construction project accounting through the **ProjectPro** extension.

Supply Chain Management Series - By using Business Central’s built-in intelligence you predict when and what to replenish in inventory. Purchase only what you need with dynamically updated inventory levels. This helps you reduce shortages and avoid lost sales. Automatically calculate stock levels, lead times, and reorder points. Suggest substitutes when requested items are out of stock. You maximize profitability when you get recommendations on when to pay vendors, use vendor discounts, or avoid overdue penalties. Moreover, you prevent unnecessary or fraudulent purchases through approval workflows. Modules include:

Sales Order Management - Manage sales orders, blanket sales orders, and sales order processes.

Purchase Orders - Manage purchases, blanket orders, and purchase order processes.

Inventory - Set up items that you carry in your stock and specify their unit of measures, costing method, inventory posting group, unit cost, and price and other properties.

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 plant, distribution center, warehouse, showroom, etc.

Assembly Management - Supports companies that supply products to their customers by combining components in simple processes without the need of manufacturing functionality. Specify a list of sellable items, raw materials, or resources as an Assembly Bill of Materials. Use assembly orders to replenish assembly items, to stock, or capture the customer’s special requirements.

All Supply Chain Management Modules:

Supply Chain Management		
Basic Receivables	Requisition Management	Item Cross References
Sales Invoicing	Alternative Order Addresses	Nonstock Items
Sales Order Management	Purchase Return Order Management	Item Tracking
Sales Invoice Discounts	Purchase Line Discounting	Item Charges
Alternative Ship-To Addresses	Purchase Line Pricing	Bin
Shipping Agents	Drop Shipments	Pick
Sales Return Order Management	Salespeople / Purchasers	Analysis Reports
Sales Line Discounting	Basic Inventory	Item Budgets
Sales Line Pricing	Multiple Locations	Workflow
Sales Tax / VAT*	Document Management, Document Capture and OCR Document Management, Document Capture and OCR	
Basic Payables	Alternative Vendors	E-services
Purchase Invoicing	Assembly Management	Item Categories
Purchase Order Management	Location Transfers	Item Attributes
Purchase Invoice Discounts	Item Substitutions	Stock keeping Units

Warehouse Management Series - 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, while they are consolidated for multiple orders in advanced warehousing. Warehouse modules include:

Warehouse Management Systems - Manage items on a bin level. Pick and put away items in a bin and move items between bins using a report that optimises space using picking processes.

Warehouse Receipt - Enable warehouse workers to create a put-away from the receipt.

Warehouse Shipment - Enable warehouse workers to create a pick from the shipment.

Bin Setup - Easily set up and maintain your bins by defining both the layout of your warehouse and dimensions of your racks, columns, and shelves.

Automated Data Capture System - Capture data automatically. Keep data accurate, even in a hectic environment.

All Warehouse Management Modules:

Warehouse Management		
Order Promising	Put Away	Warehouse Management Systems
Calendars	Warehouse Receipt	Internal Picks and Put Aways
Campaign Pricing	Warehouse Shipment	Automated Data Capture System
Cycle Counting	Standard Cost Worksheet	Bin Set-Up

Human Resources Series - Modules include:

Employees - Group and track employee information and organize employee data according to different types of information, such as experience, skills, education, training, and union membership. Keep track of benefits, company items, and much more.

Expense Management - Post expenses against employee cards to track and reimburse their expenses.

Other Modules - In addition to the above series of modules, there is an "Other" series of nine modules that round out D365 BC Essential. In addition, there is the Outlook Integration feature.

Multiple Languages - In addition to Multiple Currencies in the Financials series, this module enables you to switch languages in real time.

Embedded Power BI - With the Business Central Power BI Content Pack, you can transform data into stunning visuals and build an out-of-the-box dashboard with key financial data. With the added Power BI Desktop, you can create your own customized dashboards and interactive reports.

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

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

Outlook Integration - While in Outlook, the system allows you to access Business Central in a companion window with one click. Also, you can synchronize your to-do items and your contacts with your meetings, tasks, and contacts in Outlook.

Other		
Unlimited Companies	Job Queue	Word reporting/Document reporting
Multiple Currencies	Reason Codes	User Management
Intrastat	Extended Text	
Embedded Power BI		

Functionality in Premium Licensing

Includes all Essential series of modules described above plus:

Service Management Series - Business Central Premium licensing delivers the set of modules that handle field service management. Here are the modules that make up this series:

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

Service Price Management - Set up, maintain, and monitor your service prices.

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

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 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 labor hours.

Service Order Management		
Service Order Management	Service Item Management	Planning and Dispatching
Service Price Management	Service Contract Management	

Manufacturing Series - Dynamics 365 Business Central Premium version has robust and intuitive manufacturing functionality. Seemingly complex processes can be completed accurately and efficiently. Business Central helps you stay ahead of the competition by providing your customers with accurate information and on-time orders. The built-in business intelligence in the system enables manufacturers to get a clear picture of inventory levels, production efficiencies, and forecast the future demand of their products. Modules include:

Production Orders - Create and manage production orders and post-consumption and output to the production orders.

Production Bill of Materials - Create bills of materials and calculate standard costs.

Version Management - Create and manage different versions of the manufacturing bill of materials and routings.

Supply Planning - Plan material requirements based on demand with support for master production scheduling and materials requirements planning (MRP).

Demand Forecasting - Plan and create production and purchase orders, taking into consideration the demand forecast together with the level of available inventory and parameters of requirements planning.

Sales & Inventory Forecasting - Built-in intelligence leverages historical data and helps you manage your stock and respond to your customers. Based on the forecast, it helps create replenishment requests and saves you time.

Capacity Planning - Add capacities (work centers) to the manufacturing process. Set up routings and use these routings on production orders and in material requirements planning (MRP).

Finite Loading - Take capacity constraints into account so that no more work is assigned to a work center than what the capacities can be expected to execute during a given time period.

Machine Centers - Designed to help you manage capacity of a single machine/producing resource on several levels, including detailed machine centers and consolidated work centers.

Agile Manufacturing - Plan rush hours, make exceptions and handle last-minute changes to your processes with multiple planning options.

All Manufacturing Modules:

Manufacturing		
Production Orders	Basic Supply Planning	Finite Loading
Production Bill of Materials	Demand Forecasting	Sales and Inventory Forecasting
Version Management	Basic Capacity Planning	Agile Manufacturing
Machine Centers		

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To see the power of this solution, you can take a [Tour of Dynamics 365 Business Central](#) on Synergy’s website. There are examples of its seamless integration with Office 365 and Outlook and its comprehensive functionality. Then [contact us](#) to start a conversation and arrange a custom demonstration.

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PORTLAND | SEATTLE | BOISE | FINDLAY, OHIO

Bring your data to life

Connect to hundreds of data sources, and visualize all your data with live dashboards and reports. Then share insights across your organization to fuel intelligent action.



Power BI

What is Power BI?

Power BI is a business analytics service that delivers insights to enable fast, informed decisions. It empowers you to:

- Transform data into **stunning visuals** and share them with colleagues on any device
- Visually explore and **analyze data**—on-premises and in the cloud—all in one view
- Collaborate on and share **customized dashboards** and interactive reports
- Scale **across your organization** with built-in governance and security
- Make you **Dynamics 365 Business Central** data available as a data source in Power BI
- **Build powerful reports** with Business Central data on the state of your business

How does it work with Dynamics 365 Business Central?

Getting insights into your Business Central data is easy with Power BI and the Business Central content packs. **Power BI retrieves your data** and then builds an out-of-the-box dashboard and reports based on that data.

You must have a valid account with Dynamics 365 Business Central and with Power BI.

The **Dynamics 365 Business Central content pack** provides a dashboard with key financial data over time, such as earnings versus expenses, operating margin, cash cycle, and more. Once you download the Power BI Desktop, **you can create your own Power BI reports.**

Power BI is most powerful with **Dynamics 365 Business Central** as your ERP, integrated with Office 365, Outlook, and CRM. It compliments other tools like [Microsoft Flow](#) and [PowerApps](#).

[Watch Overview](#)



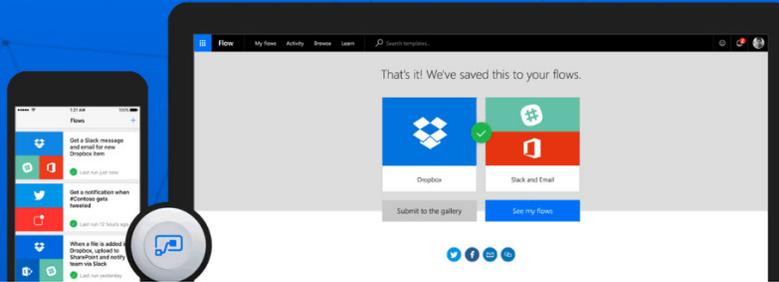
Enterprise Resource Planning
Cloud Solution Provider

Work less, do more

Create automated workflows between your favorite apps and services to get notifications, synchronize files, collect data, and more

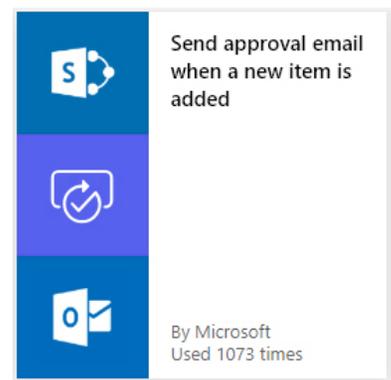
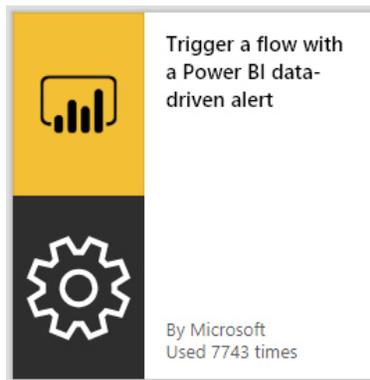
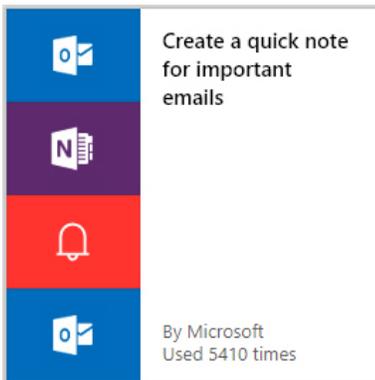


Find a template or connector to start with



What is Microsoft Flow?

Microsoft Flow is a cloud-based software tool that allows employees to create and automate workflows across multiple applications and services without the need for developer help. It turns repetitive tasks into multi-step workflows. To create an automated flow, the user specifies what action should take place when a specific event occurs. There are a wide variety of templates for creating workflows that look like this:



What are examples of flows of automated tasks that apply to my business?

- Better track and manage your time and expenses
- Stay connected to what's happening in the office through notifications
- Streamline your service calls with automatic creation of service tickets
- Stay on top of consulting work by reporting your activities
- Optimize your sales efforts with instant addition of notes or creation of new contacts

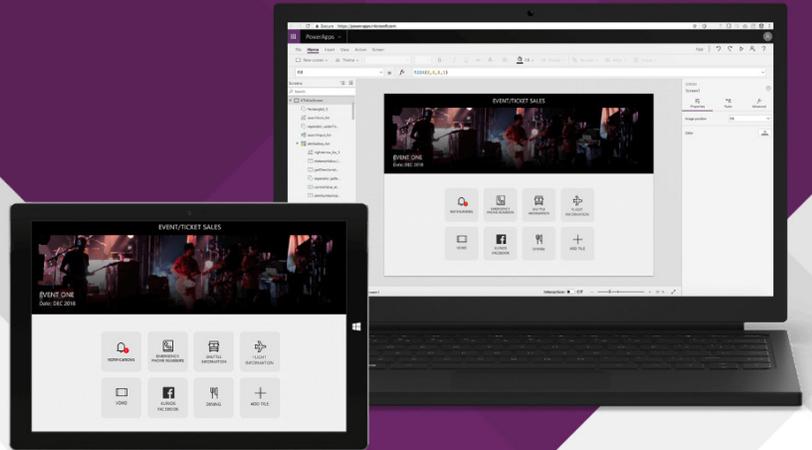
Once a flow is built, it can be managed on the desktop or through an app on a mobile device. Flow integrates with your Microsoft software, including [Dynamics 365 Business Central](#), Office 365, and [PowerApps](#), and is made more powerful when part of an ERP system that includes [Power BI](#).



PowerApps

Apps that mean business

Easily build the business apps you need and extend or customize the apps you already use.



What is PowerApps?

PowerApps is Microsoft’s way of enabling non-developers to build functional applications without writing any code. It comes with sample applications as a starting point for building your own apps, or as a tool for learning how PowerApps works.

You can build apps fast with a point-and-click approach to app design. You can choose from a large selection of templates or start from a blank canvas. Your apps easily connect to data and use Excel-like expressions to easily add logic. You can publish your app to the web, iOS, Android, and Windows 10. It’s that easy.

Developers will like the pro-developer extensibility, which is natively built into the platform. This allows them to seamlessly extend app capabilities using Azure Functions or using custom connectors to connect to custom or legacy systems.

How is data stored and what data can we use?

With Common Data Service for Apps built in, you get a powerful data service with rich customization, business logic, and security capabilities. Your data is stored in a standard format through the common data model so it’s ready to go and easy to use.

Data is at the core of every app. We make it easy to get your data into your apps with more than 200 connectors for many popular cloud services and even your on-premises data. Here are some of the tools and software with which PowerApps connects data:



PowerApps is made most powerful when you have **Dynamics 365 Business Central** as your ERP system and you utilize all its integration capabilities with Office 365, Outlook, Excel, CRM, and the other two tools in the Microsoft Power Platform: [Power BI](#) and [Microsoft Flow](#).



Enterprise Resource Planning
Cloud Solution Provider