

# SL Overlay

Features built with SL customers in mind,  
but available to all Dynamics 365 Business Central users for free

# SL Overlay

The SL Overlay adds new features to Microsoft Dynamics 365 Business Central that everyone can use

The SL Overlay is the result of working with  
Microsoft Dynamics SL users  
Microsoft Dynamics Business Central users

A perfect addition to enhance existing and new user transition to Microsoft Dynamics Business Central.

Fall 2020 released

**Spring 2021 releasing**

**June release scheduled**



# SL Overlay Spring 2021 release

- Created by User enhancements
- List Page view enhancements
- Release multiple batches at one time
- Control Total enhancements
- Budgeting enhancement
- New Graphic Menu layout to assist in accessing screens
- Changing terminology
- 10 new SL based reports
- Period Fields enhancements

# Created By User ID

- Keeps track of the user who created (not just posted) an entry
- Adding original Created By User ID field to screens
  - Sales & Purchase documents
  - Customer and Vendor Ledger
  - General Ledger

*Benefit:* Track who created an entry

# Created By User ID

←

Sales Order | Work Date: 7/1/2020

+

S-ORD101006 · Adatum Corporation

ProcessReportReleasePostingPrepareOrderRequest ApprovalPrint/SendNavigateAction

General

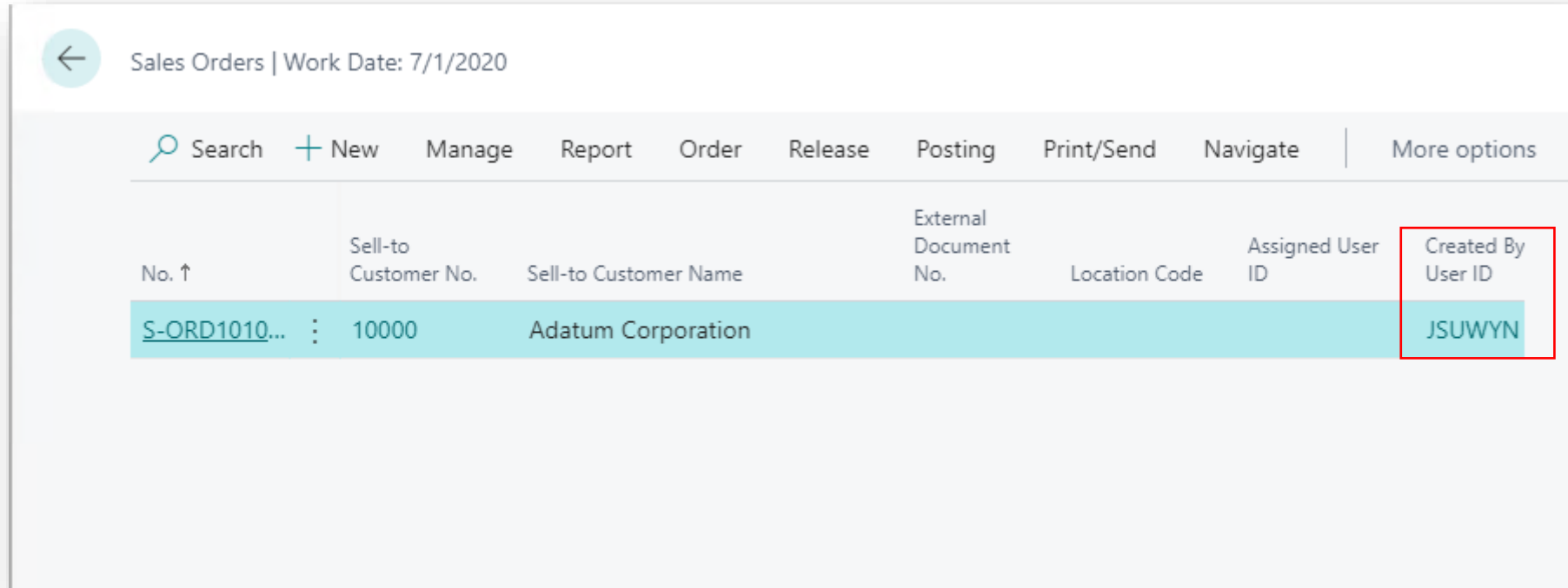
Show less

Customer No. ....	10000	Due Date .....	8/1/2020
Customer Name .....	Adatum Corporation	Requested Delivery ...	
<b>Sell-to</b>		Promised Delivery D...	
Address .....	192 Market Square	External Document ...	
Address 2 .....		Your Reference .....	
City .....	Atlanta	Salesperson Code ....	PS
State .....	GA	Campaign No. ....	
ZIP Code .....	31772	Opportunity No. ....	
Country/Region Code	US	Responsibility Center ..	
Contact No. ....	CT000001	Assigned User ID .....	
Phone No. ....		Created By User ID ....	JSUWYN
Mobile Phone No. ....		Status .....	Open
Email .....	robert.townes@contoso.com	Total Document Am...	1,100.00
Contact .....	Robert Townes	Total Document Line...	865.49
No. of Archived Vers...	0	Difference .....	234.51
Document Date .....	7/1/2020	<b>Work Description</b>	
Posting Date .....	7/1/2020		
Order Date .....	7/1/2020		

# List page enhancements

- Added Created By User field for filtering
  - *Benefit:* Only see your entries to speed up finding your items
- Post and Print batch from Document List
  - *Benefit:* Select post and print batches from list page

# Default filter to only see your entries



The screenshot shows a 'Sales Orders' interface with a work date of 7/1/2020. A toolbar at the top includes buttons for Search, New, Manage, Report, Order, Release, Posting, Print/Send, Navigate, and More options. Below the toolbar is a table of sales orders. The first row is highlighted in light blue, indicating it is the selected entry. A red box highlights the 'Created By User ID' column for this entry, showing the value 'JSUWYN'. This indicates that the default filter is set to show only entries created by the user JSUWYN.

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Created By User ID
<a href="#">S-ORD1010...</a>	10000	Adatum Corporation				JSUWYN

# Post and Print Batch

Dynamics 365 Business Central



Purchase Orders | Work Date: 5/13/2021



Search



New

Manage

Print/Send

Order

Release

Posting

Navigate

More



Post...



Post and Print...



Preview Posting



Post Batch...



Post and Print Batch...

# Release multiple batches

Release multiple purchase or sales documents at one time

Dynamics 365 Business Central

Sandbox

Purchase Invoices | Work Date: 7/1/2020

Search + New Manage Invoice Posting Release Navigate Actions Related SmartList Fewer options

Release Reopen Release Batch

<input checked="" type="checkbox"/>	107213	20000	First Up Consultants	ASD45637	LAPPLEGATE
<input checked="" type="checkbox"/>	107214	40000	Wide World Importers	CFR678	LAPPLEGATE
<input type="checkbox"/>	107215	50000	Nod Publishers	VFR56789	LAPPLEGATE
<input type="checkbox"/>	107217	10000	Fabrikam, Inc.	BV FY78543	LAPPLEGATE

Details Attachments (0)

Incoming Document Files

Name Type

(There is nothing to show in this view)

Vendor Details

Vendor ID 40000

Name Wide World Importers

Phone No.

Email tchubeds@centere.com

# Control Totals

- Added “Control Total” field to Purchase and Sale Invoice pages
- *Benefit:*
  - Before starting data entry, enter a control total
  - Enter 20 lines that should total \$20,000
  - Confirm data entry is matching documents
- Track during data entry whether all lines entered equal the control total
- Optional to set whether to allow release if detail lines do not equal the control total

# Control Totals

- Total Document Amount
  - Control total
- Total Document Lines
  - Tracks all line entered
- Difference
  - Total Document Amount – Total Document Lines

← Sales Order | Work Date: 7/1/2020 ✎ + 🗑

S-ORD101006 · Adatum Corporation

Process Report Release Posting Prepare Order Request Approval Print/Send Navigate | More

### General Show more

Customer Name	Adatum Corporation	External Document	
Contact	Robert Townes	Status	Open
Posting Date	7/1/2020	Total Document Am...	1,100.00
Order Date	7/1/2020	Total Document Line...	865.49
Due Date	8/1/2020	Difference	234.51
Requested Delivery			

### Lines Manage More options 🔗

Type	No.	Description	Location Code	Quantity	Qty. to
Item	1900-S	PARIS Guest Chair, black		1	
Item	1908-S	LONDON Swivel Chair, blue		1	
Item	1906-S	ATHENS Mobile Pedestal		1	
→ Item	*	*			

Subtotal Excl. Tax (U...	816.50	Total Excl. Tax (USD)	816.50
Inv. Discount Amoun...	0.00	Total Tax (USD)	48.99
Invoice Discount %	0	Total Incl. Tax (USD)	865.49

# Vendor & Customer Totals

- Add Total Vendor Lines Amount and Total Customer Lines Amount
  - Purchase Journals
  - Sales Journals

Dynamics 365 Business Central

PURCHASE JOURNALS | WORK DATE: 12/31/2020

Batch Name: ..... DEFAULT

Current Period: 02/01/18 - 02/28/18 [02-2018]

Manage Process Page Post/Print Line Account More options

Posting Date	Document Type	Document No.	External Document No.	Account Type	Account No.	Vendor Name	Description	Document Amount	Amount (\$)	Bal. Account Type	Bal. Account No.	Bal. Gen. Posting Type	Bal. Gen. Bus. Posting Group	Bal. Gen. Prod. Posting Group	Applies to Doc. Type
12/31/2020	Invoice	G00005		Vendor	20000	First Up Consultants	First Up Consultants	0.00	-800.00	G/L Account					
12/31/2020	Invoice	G00005		G/L Account	60100	Rent Expense	Rent Expense	0.00	800.00	G/L Account					
12/31/2020	Credit Memo	G00006		Vendor	20000	First Up Consultants	First Up Consultants	0.00	-200.00	G/L Account					
→ 12/31/2020	Credit Memo	G00006		G/L Account	60100	Rent Expense	Rent Expense	0.00	-200.00	G/L Account					

NUMBER OF LINES	DOCUMENT BALANCE	BALANCE	TOTAL BALANCE
3	200.00	0.00	200.00
Total Vendor Lines Amount			-600.00

NUMBER OF LINES	DOCUMENT BALANCE	BALANCE	TOTAL BALANCE
3	0.00	-200.00	0.00
Total Vendor Lines Amount			-600.00

# Budgeting Enhancement

## Budgets

- Map Shortcut Dimensions 3 through 6 set up on General Ledger Setup to the Budget Dimensions.
- Created an option field on the SL Overlay Setup page called Map Shortcut Dims. to Budget Dims. to turn this feature on.
- *Benefit:* Allow users to filter on Budget Dimensions individually in the Budget reports.

Dynamics 365 Business Central

Sandbox

G/L Budgets | Work Date: 7/1/2020

Search + New Edit List Delete Process Reports

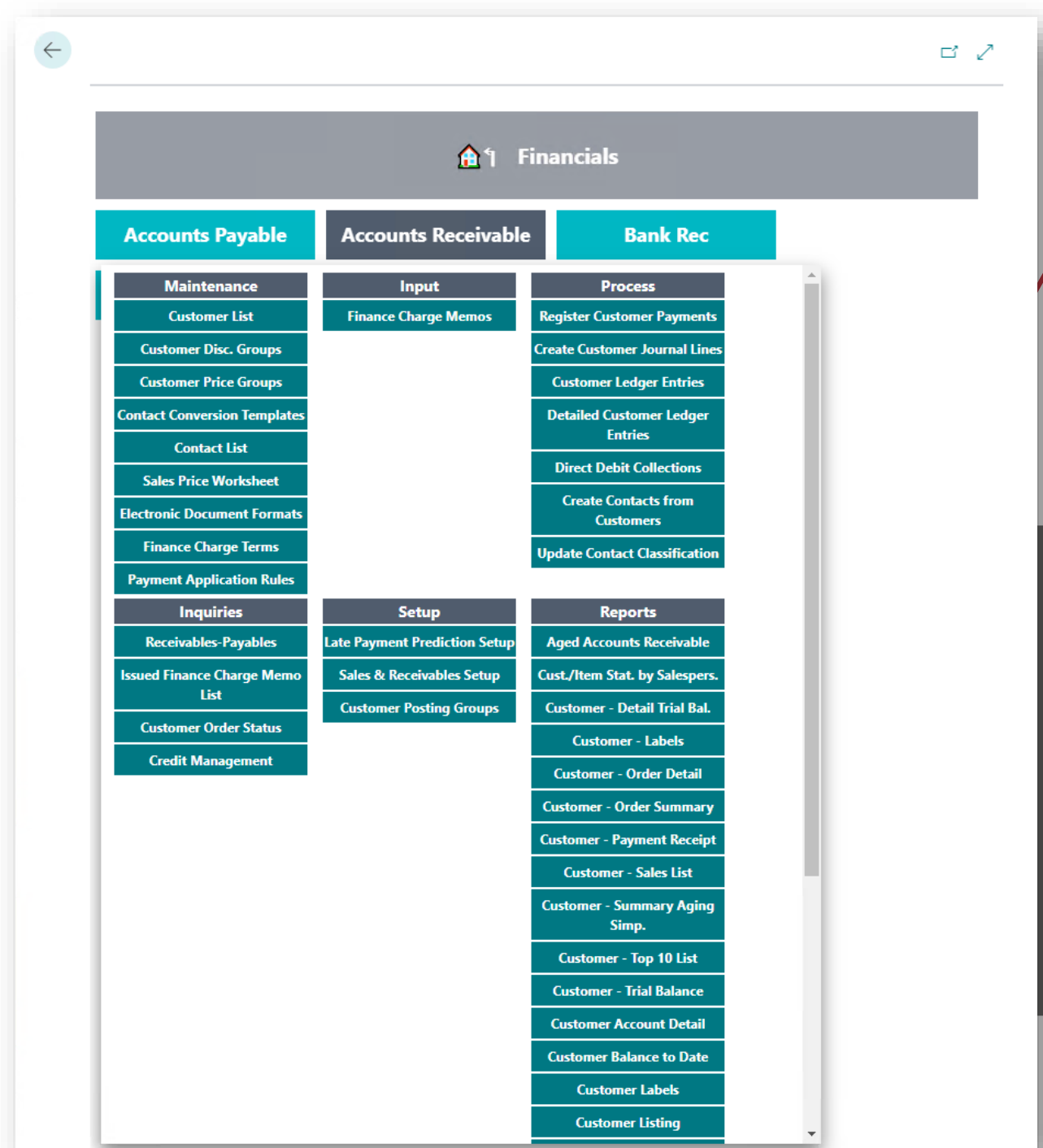
Name ↑	Description	Global Dimension 1 Code	Global Dimension 2 Code	Budget Dimension 1 Code	Budget Dimension 2 Code	Budget Dimension 3 Code	Budget Dimension 4 Code	Blocked
→ BUDGET	2020 Budget	DEPARTMENT	CUSTOMERGROUP					<input type="checkbox"/>
TEST	Test Budget	DEPARTMENT	CUSTOMERGROUP	COMPANYEAST	COMPANYNORTH	COMPANYSOUTH	COMPANYWEST	<input type="checkbox"/>

# New Graphic Menu

- New Graphic menu using SL menu layout (desktop and portable)
- Based on classic Dynamics SL menu groups
- Editable menu system

# Graphic Menu

- Displays based on access
- Grouped based on SL menu



# Customizable Graphic Menu

- Ability to customize the menu system by users or group

Dynamics 365 Business Central

Sandbox

Module Menu Maintenance | Work Date: 7/1/2020

✓ Saved

Search Edit List More options

Menu Filters

User Name JSUWYN Menu Module Menu Category

Menu Group

Menu Preview

Pages/Reports	Module Name ↑	Category Name
→ Vendor	Accounts Payable	Maintenance
Contact List	Accounts Payable	Maintenance
Duplicate Contacts	Accounts Payable	Maintenance
Payment Journals	Accounts Payable	Input
Create Vendor Journal Lines	Accounts Payable	Process
Create Contacts from Ven...	Accounts Payable	Process
Date Compress Vendor Le...	Accounts Payable	Process
Detailed Vendor Ledger E...	Accounts Payable	Process
Vendor Ledger Entries	Accounts Payable	Process
Receivables-Payables	Accounts Payable	Inquiries

Financials Inventory

Orders Foundation

# Changing Terminology

- Adding the Dynamics SL screen names to BC screen names
- Change terminology on screens to reflect Dynamics SL names
- *Benefit:* Making Dynamics 365 BC easier to navigate for SL users
- Assist setup by adding posting group setup links to:
  - Purchases & Payable Setup
  - Sales & Receivables Setup
  - Inventory Setup
- *Benefit:* Posting groups are required to be setup. Ease setup by adding a link to the main posting groups from these setup screens.

# Changing Terminology

← SL Chart of Account Maint. | Work Date: 7/1/2020

SL Chart of Accounts Maintenance – G/L Account Card . 10100 . Che

Process Account Balance | More options

**General**

No. .... 10100

Name ..... Checking account

Income/Balance ..... Balance Sheet

Account Category Ty... Assets

Account Subcategor... Cash

Debit/Credit ..... Debit

Account Type ..... Posting

Totaling .....

← Vendor Card | Work Date: 7/1/2020

10000 · Fabrikam, Inc.

Process Report Request Approval New Document Navigate Vendor | More options

**General**

Vendor ID ..... 10000

Name ..... Fabrikam, Inc.

Blocked ..... ▼

Balance (\$) ..... 2,297.97

Balance Due (\$) ..... 2,297.97

DIOT Type of Operati... ▼

Details Attachments (0)

Vendor Picture ▼

← ...etup – Purchases & Payable Setup | Work Date: 7/1/2020

SL AP Setup – Purchases & Payable Setup

SL Vend. Class-Vend. Post Grp Incoming Documents Setup Gen. Business Posting Groups General Product Posting Groups General Posting Setup

**General**

Discount Posting ..... All Discounts

Invoice Rounding ..... ☒

Create Item from Item No. .... ☐

Appln. between Currencies ..... All

Exact Cost Reversing Mandatory ..... ☐

Print Auto Update Frequency ..... Never

# 10 New SL based reports

## Financial & system reports

- Adding dimensions 3-8 in financial reporting
- Adding new Period field to financial reporting
- *Benefit:* Add reports that are familiar to SL users



# 10 New SL based reports

- SL Budget
- SL Cash Applied
- SL Trial Balance
- SL Dimensions
- SL Trial Balance/Budget
- SL Trial Balance by Period
- SL Trial Balance Detail/Summary
- SL Customer – Detail Trial Balance
- SL Vendor – Detail Trial Balance
- SL Permissions Comparison
  - Compare two users' permissions to find differences and solve issues

# Period fields

- Define Fiscal Periods in Accounting Periods screen
- Period Close field
  - Close periods automatically set date range based on period value

Accounting Periods | Work Date: 7/1/2020

Search + New Edit List Delete Process Reports More options

Starting Date ↑	Name	Fiscal Period	Period Closed	New Fiscal Year	Year Closed	Date Locked	Inventory Period Closed
→ 1/1/2018	January	01-2018	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2/1/2018	February	02-2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3/1/2018	March	03-2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4/1/2018	April	04-2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5/1/2018	May	05-2018	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

General Ledger Setup

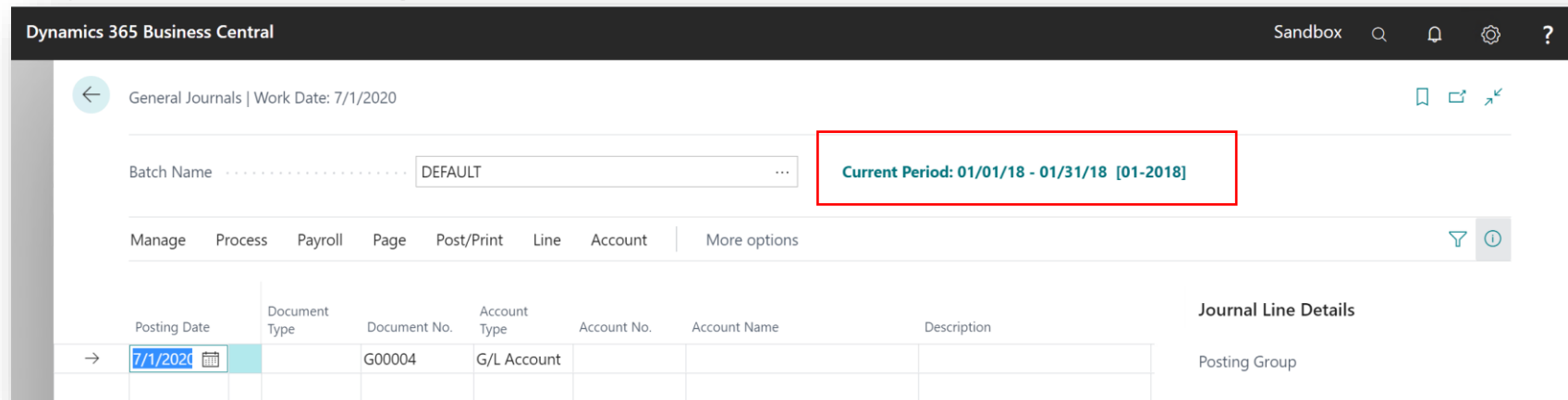
General Posting VAT Bank Journal Templates SL Reports Actions Related Fewer options

General Show more

Allow Posting From	2/1/2021	LCY Code (Local Currency)	USD
Allow Posting To	2/28/2021	Local Currency Symbol	\$

# Period fields

- Display Accounting Period on screen



The screenshot shows the Dynamics 365 Business Central interface for the 'General Journals' page. The top navigation bar includes 'Dynamics 365 Business Central', 'Sandbox', and search, notification, and help icons. The page title is 'General Journals | Work Date: 7/1/2020'. Below the title, there is a 'Batch Name' field set to 'DEFAULT'. To the right of this field, a red box highlights the text 'Current Period: 01/01/18 - 01/31/18 [01-2018]'. Below the batch name, there is a tabbed interface with 'Manage', 'Process', 'Payroll', 'Page', 'Post/Print', 'Line', 'Account', and 'More options'. The 'Line' tab is selected. Below the tabs, there is a table with columns: 'Posting Date', 'Document Type', 'Document No.', 'Account Type', 'Account No.', 'Account Name', 'Description', and 'Journal Line Details'. The 'Posting Date' column has a date picker set to '7/1/2020'. The 'Document No.' column has the value 'G00004'. The 'Account Type' column has the value 'G/L Account'. The 'Journal Line Details' column has the value 'Posting Group'.

Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Journal Line Details
→ 7/1/2020		G00004	G/L Account				Posting Group

- Periods available to enter in new SL BC reports

# SL Overlay Setup

Includes the SL Overlay Setup screen that is used to turn On and Off features

The screenshot displays the 'SL Overlay Setup' interface. At the top, there's a navigation bar with a back arrow, edit icon, add icon, delete icon, and status indicators for 'Saved', a bookmark, and a share icon. Below this is a notification bar with two messages: 'A routine is required to update the Default Dimension...' and 'A routine is required to update the Shortcut Dimension...'. The main content area is divided into sections: 'Shortcut Dimensions', 'Default Dimensions', 'Fiscal Period', 'Documents', and 'SL Terminology'. Each section contains specific settings, some with numerical values and others with toggle switches.

Section	Item	Value / Status
Shortcut Dimensions	G/L Entries that Require Initialization	4295
	Cust. Ledger Entries that Require Initialization	415
	Vend. Ledger Entries that Require Initialization	403
	Map Shortcut Dims. To Budget Dims.	Toggle On
Default Dimensions	G/L Accounts that Require Initialization	80
	Customer Records that Require Initialization	4
	Vendor Records that Require Initialization	5
Fiscal Period	Enable Fiscal Period Feature	Toggle On
Documents	Show Document Total...	Toggle On
	Restrict Posting if Diff...	Toggle On
SL Terminology	SL Terminology Changes	Toggle On

# SL Overlay Help & Videos

- Online help is included
- Includes setup and demonstration videos



# SL Overlay June 2021 release

- Additional features and information, including:
  - Graphic menu enhancements
  - Create and Post User and date enhancements
  - Correcting Journal
- Videos addressing how to complete tasks in Dynamics 365 Business Central