SL Overlay

Features built with SL customers in mind,
but available to all Dynamcis 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
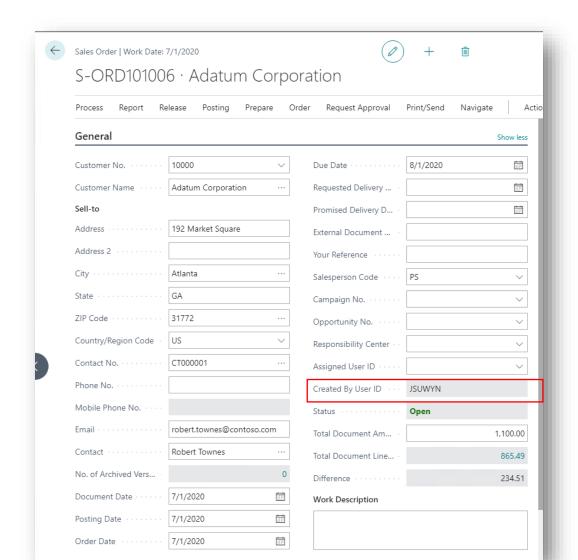
SL Overlay Spring 2021 release

- 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

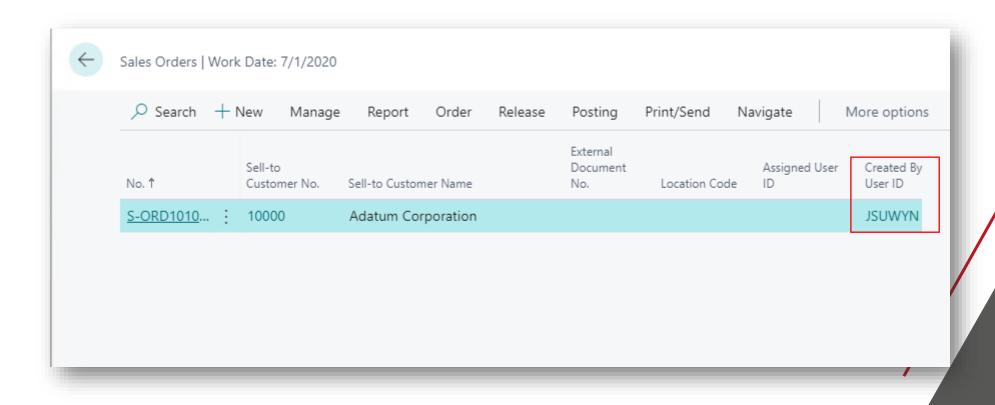*Benefit:* Track who created an entry
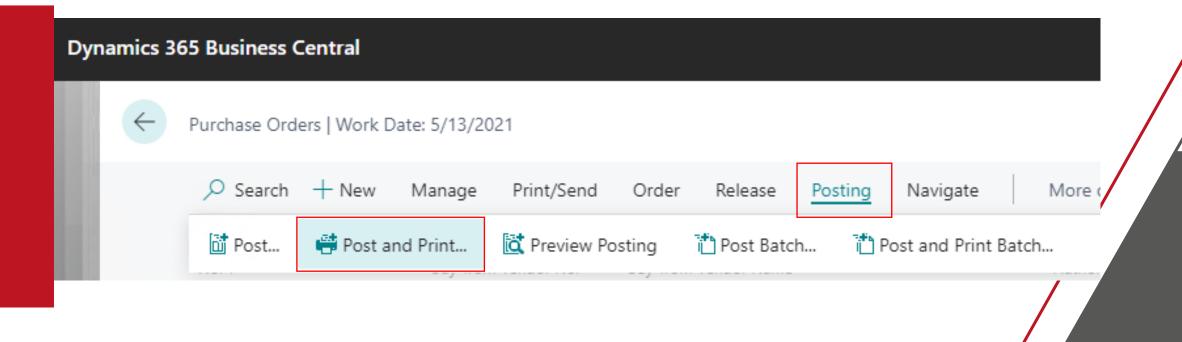
Created By User ID

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
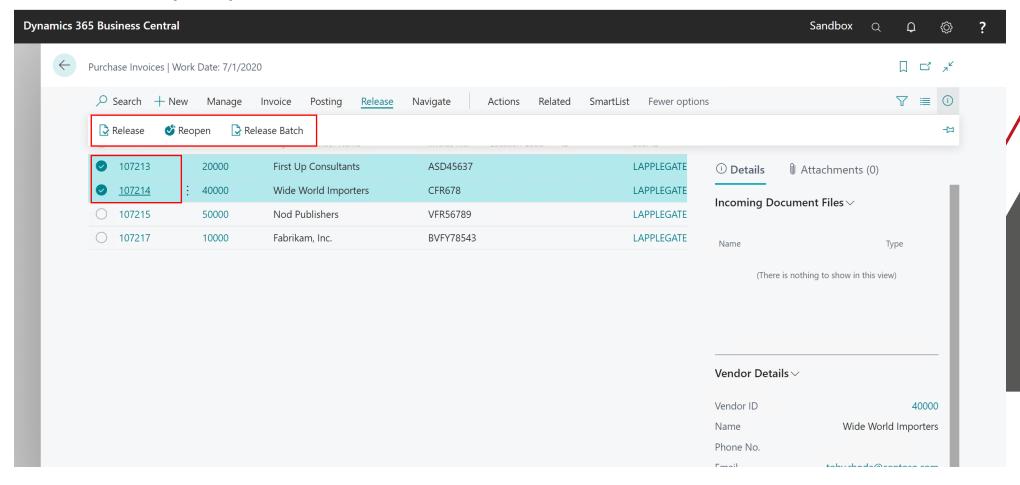
Default filter to only see your entries

Post and Print Batch

Release multiple batches
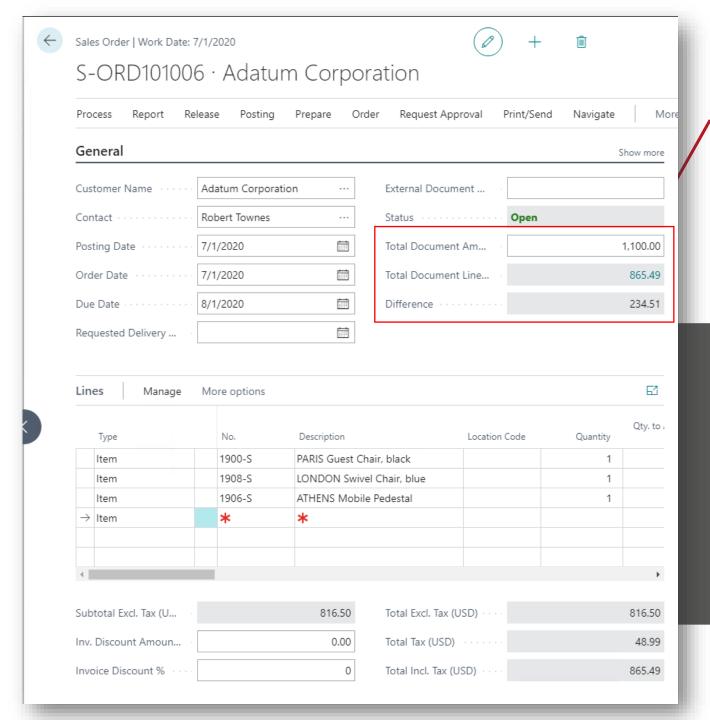
Release multiple purchase or sales documents at one time

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
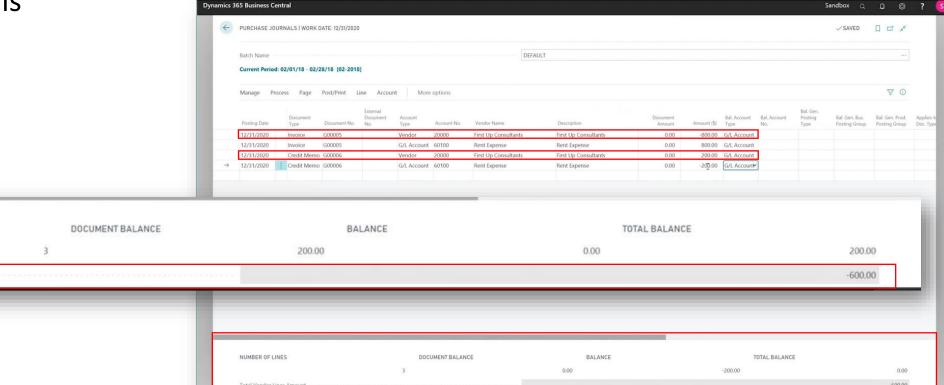 - Total Document Amount – Total Document Lines

Vendor & Customer Totals

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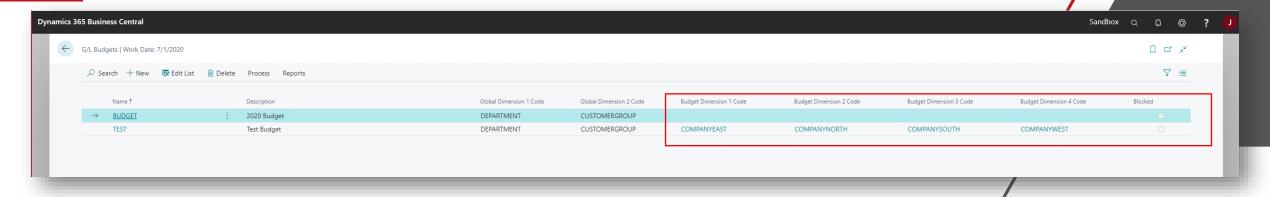 - Sales Journals

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.

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
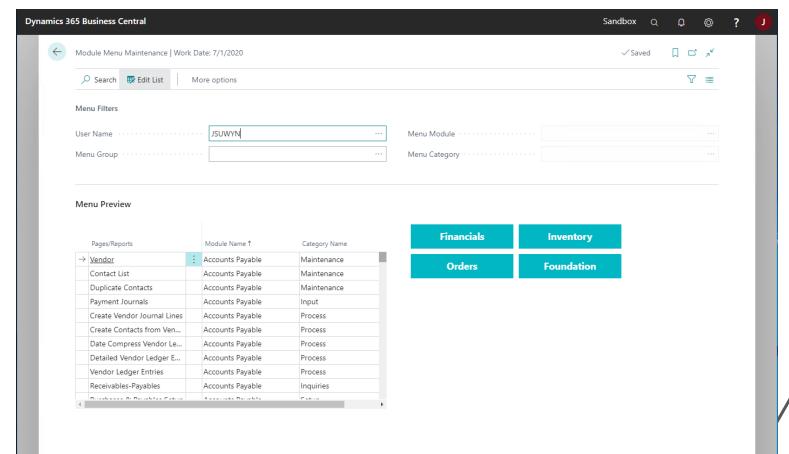
- Displays based on access
- Grouped based on SL menu

Customizable Graphic Menu

- Ability to customize the menu system by users or group

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 optio

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   ✓ Saved

10000 · Fabrikam, Inc.

Process   Report   Request Approval   New Document   Navigate   Vendor | More options   ⓘ

General   Show more   ⓘ Details   🔗 Attachments (0)

Vendor ID   10000   ...   Balance ($) . . . .   2,297.97   **Vendor Picture** ⌄

Name . . . .   Fabrikam, Inc.   Balance Due ($) 2,297.97

Blocked . . . .   DIOT Type of Operati... .

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

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   Show more

Discount Posting . . . .   All Discounts   Appln. between Currencies . . . .   All

Invoice Rounding . . . . .   ⬤   Exact Cost Reversing Mandatory . . . .   ⬤

Create Item from Item No   Prepmt. Auto Update Frequency . . . .   Never

10 New SL based reports
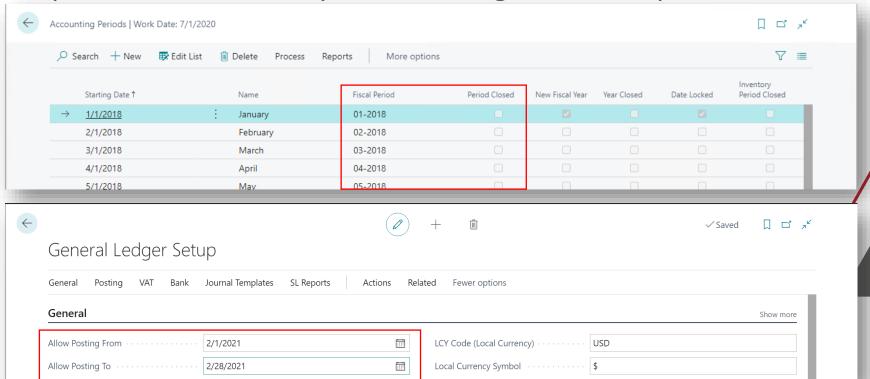
Financial & system reports
- Adding dimensions 3-8 in financial reporting
- Adding new Period field to financial reporting
- *Benefit:* Add reports that are familiar to SL users

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
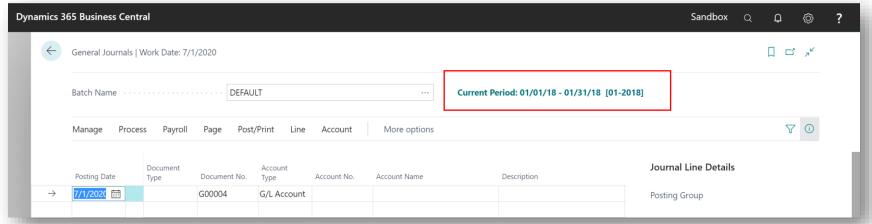 - Compare two users' permissions to find differences and solve issues

Period fields

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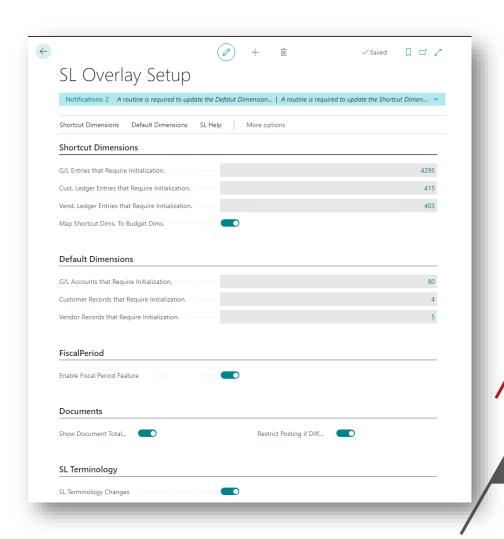 - Close periods automatically set date range based on period value

Period fields

- Display Accounting Period on screen

- 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

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