Joe software
Works for people

Business Central Tricks & Whats New

Overview

- Date Formulas
- Quick Entry
- Report Scheduler
- What's New
- Email Scenario Attachments
- Analyze Mode
- Excel Layouts
- Questionnaire Functionality??
- 3rd Party Products
- Q & A

Date Formulas

- Very useful in creating filters on dates
- https://learn.microsoft.com/en-ca/dynamics365/business-central/ui-enter-date-ranges
- https://thatnavguy.com/date-formula-in-business-central/
- Useful formulas
  - Last Month -CM-1M..-CM-1D
  - Current Year -CY..CY

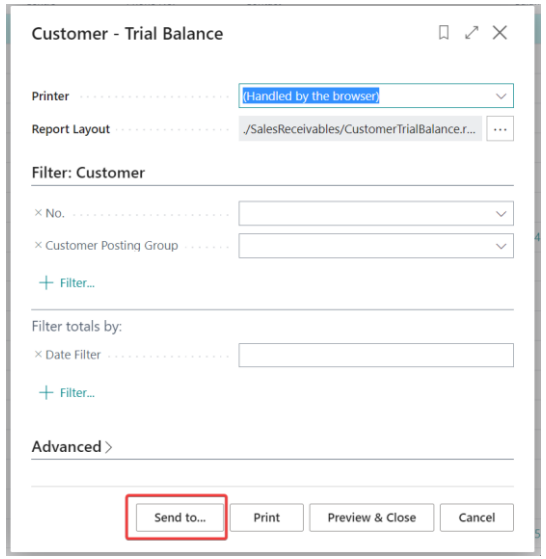
What is Quick Entry?

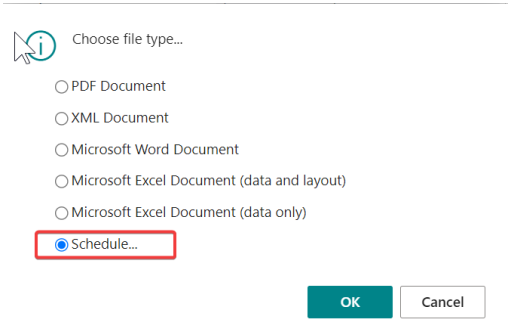
- Quick entry = Accelerate repetitive entry of records
- Powerful and simple feature that provides an alternate path through editable fields
- Changes behavior of Enter key to be different than Tab key
  - Moves focus to next quick entry field skipping non-essential fields
- Can personalize the experience
  - Tailor it is specific role profiles
- Fields included in Quick Entry will be included in the path when you select Enter
- To navigate to a previous field, select Shift + Enter

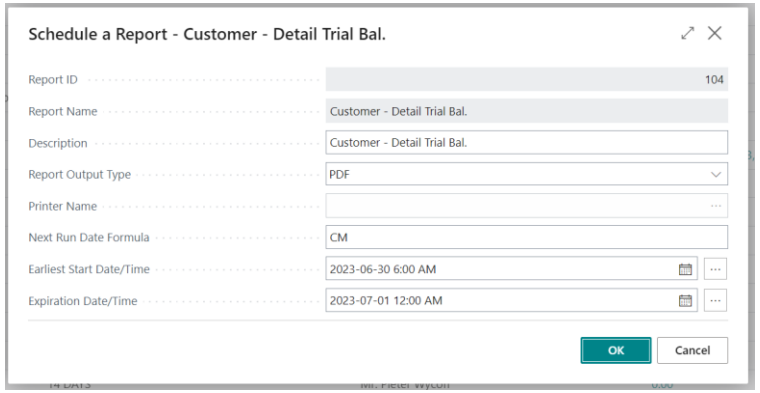
- https://learn.microsoft.com/en-us/business-applications-release-notes/april19/dynamics365-business-central/quick-entry
- https://learn.microsoft.com/en-us/dynamics365/business-central/ui-enter-data#QuickEntry

Report Scheduler

- Used for having reports automatically run periodically and appear in your Report Inbox
- Schedule is managed in your Job Queue
- https://learn.microsoft.com/en-ca/dynamics365/business-central/ui-work-report







What's New in BC?

- 2022 Wave 2
  - https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/smb/dynamics365-business-central/planned-features
- 2023 Wave 1
  - https://learn.microsoft.com/en-us/dynamics365/release-plan/2023wave1/smb/dynamics365-business-central/planned-features
- Use Feature Management to enable new functionality

2022 Wave 2

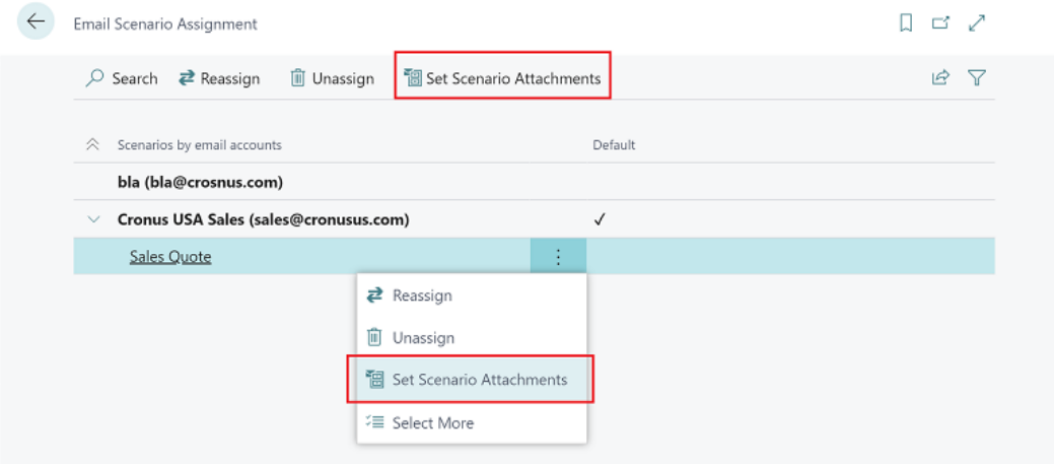
- Key New Features:
  - Use default attachments in emails sent from BC
  - Improved Bank Rec Functionality
  - Multiple Remit-To addresses per vendor
  - Enhanced CRM / Dataverse replication and integration

2023 Wave 1

- Key New Features:
  - Analyze Feature
  - Security Groups based on Active Directory Groups
  - Sync master data across companies
  - Additional Preview Journals
  - Additional flows in Power Apps
  - Statistical Accounts

Email Scenario Attachments

- Attach standard templates automatically to specific email scenarios
- For example, include terms & conditions to Quotes
- https://learn.microsoft.com/en-us/dynamics365-release-plan/2022wave2/smb/dynamics365-business-central/use-default-attachments-email-sent-business-central



Analyze Mode

- Quickly Analyze data in Business Central
- View row counts and grand totals in any list view
- Pivot Table capability directly in BC Application
- Save tabs
- Initial release only works for <100,000 rows
- Automatically enabled from Update 23.0(Q4 2023)

- https://learn.microsoft.com/en-us/dynamics365/release-plan/2023wave1/smb/dynamics365-business-central/analyze-group-pivot-data-list-pages-using-multiple-tabs

Excel Layouts

- Allows you to create simple NO CODE layouts in Microsoft Excel
- Create reports that include summaries, analysis presented in PivotTables, and Pivot Charts
- Create interactive reports using visualizations such as slicers
- Use built-in Microsoft Office features to do post-processing on rendered reports, including:
  - Protecting worksheets
  - Applying sensitive labels
  - Adding comments and notes
  - Forecasting and analysis

- https://learn.microsoft.com/en-ca/dynamics365/business-central/ui-excel-report-layouts?tabs=any-report
- https://www.youtube.com/watch?v=GIUkPzeFAbo

3rd Party Products

- Test them out in a Sandbox before Production
- Maintained in Extension Management
- Download trials from Market Place
- InsightWorks https://www.dmsiworks.com/apps/free-apps/
  - Graphical Scheduler
  - Doc Extender
  - Print Node
- Solver https://www.solverglobal.com/
  - Budgeting
  - Forecasting
  - Reporting
  - Analysis
  - Dashboards

- Dynamic Point https://www.dynamicpoint.com/
  - Expense Management
  - Invoice Automation
  - Online Portal
- EOne Solutions https://popdock.eonesolutions.com/
  - Popdock

Q & A

Questions?