



DYNAMICSCON PRESENTATION



**DYNAMICSCON
LIVE**

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**SEPTEMBER 14-16,
2022**

14 REAL TIME-SAVERS YOU CAN USE TOMORROW

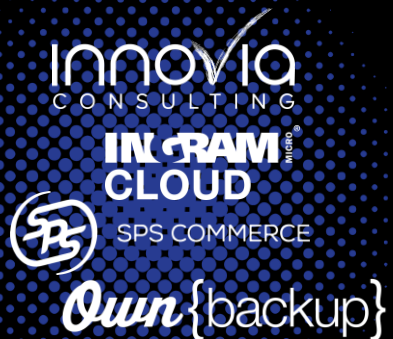
MARK HAMBLIN & KRISTEN HOSMAN



DYNAMICS
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LIVE

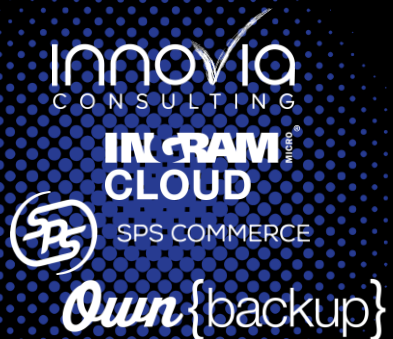
14 REAL TIME-SAVERS YOU CAN USE TOMORROW

Do you want to be more efficient in Business Central? Spend less time doing recurring tasks? Then this is the session for you! We know the title says 14 real time-savers but who's going to be counting? We're going to share as many as we can in 50 minutes.



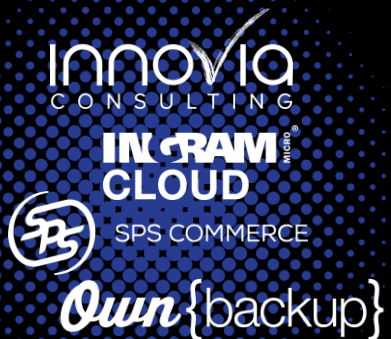
Mark Hamblin

- Edmonton, AB, Canada
- 15+ years of NAV/BC experience
- Insight Works solution advisor



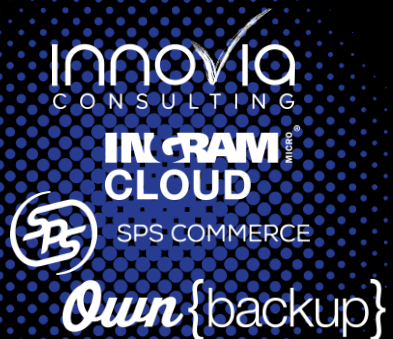
Kristen Hosman

- Denver, Colorado
- Microsoft MVP | Business Applications
- Dynamics User Group (DUG) Advisory Committee member
- linktr.ee/kristenhosman



What we're covering

- Copy/paste
- Standard journals
- Deferrals
- Recurring General Journal
- Recurring purchase/sales lines
- Working with dates
- Bank Accounts
- Personalizing Business Central
- Notifications
- Using hotkeys
- Browser tips
- Export/Edit in Excel
- Views
- Using advanced filters
- Inspecting Pages/Data



Copy/paste

Dynamics 365 Business Central

Environment: Sandbox21

General Journals

Batch Name: DEFAULT

Manage: [Home](#) | Request Approval | Payroll | Line | Incoming Document | Page | More options

Post | Get Standard Journals... | Renumber Document Numbers | Reconcile | Apply Entries...

Posting Date	Document No.	Account Type	Account No.	Description	Amount	Bal. Account Type	Bal. Account No.	Bal. Account Name	Department Code	Customer Code
4/11/2022	G00005	G/L Account	10800	Equipment	5.00	G/L Account	40100	Income, Services		
4/11/20	G00006	G/L Account	10800	Equipment	19.99	G/L Account	61900	Rounding		

AutoSave: Off

Book1 - Excel

Kristen Hosman

File | Home | Insert | Draw | Page Layout | Formulas | Data | Review | View | Help

Clipboard | Font | Alignment | Styles | Cells | Editing | Analyze Data | Sensitivity

G6

	Document No.	Account Type	Account No.	Description	Amount	Bal. Account Type	Bal. Account No.	Bal. Account Name	Department Code	Customer Code
1	4/11/2022	G00005	G/L Account	10800	Equipment	5	G/L Account	40100	Income, Services	
2	4/11/2022	G00006	G/L Account	10800	Equipment	19.99	G/L Account	61900	Rounding	

Number of Lines

Standard journals

Dynamics 365 Business Central

General Journals

✓ Saved

MEC

✕ You can use the Payment Reconciliation Journals window to import bank transactions. Try it out here. | Disable this notification.

Batch Name PAYROLL ...

Manage Process Page Post/Print Line Account Actions Related Fewer options

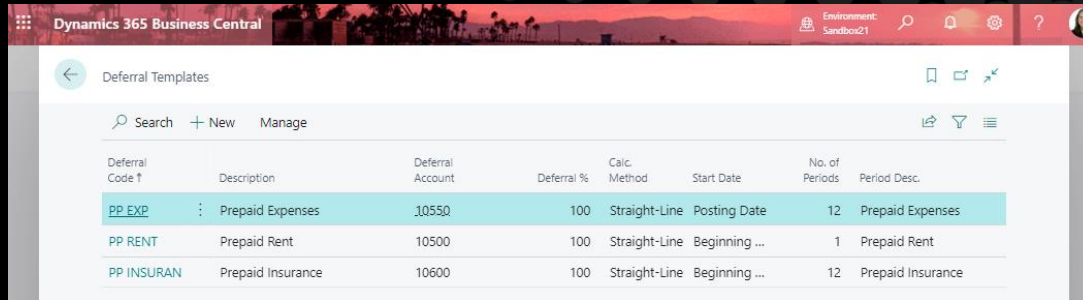
	Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Amount	Bal. Account Type	Bal. Account No.	Bal. General Posting
→	9/12/2022	:	G00389	G/L Account	60002	Salaries & Wages	Salaries & Wages	0.00	Bank Acco...		
	9/12/2022		G00389	G/L Account	60002	Salaries & Wages	Salaries & Wages	0.00	Bank Acco...		
	9/12/2022		G00389	G/L Account	60008	Colorado Unemployment Tax	Colorado Unemployment Tax	0.00	Bank Acco...		
	9/12/2022		G00389	G/L Account	60005	Federal Taxes (941/944)	Federal Taxes (941/944)	0.00	Bank Acco...		
	9/12/2022		G00389	G/L Account	60006	Federal Unemployment (940)	Federal Unemployment (940)	0.00	Bank Acco...		
	9/12/2022		G00389	Bank Acco...	CHECKING	1st Bank Checking	1st Bank Checking	0.00	Bank Acco...		
	9/12/2022		G00389	Bank Acco...	CHECKING	1st Bank Checking	1st Bank Checking	0.00	Bank Acco...		
	9/12/2022		G00389	G/L Account	20105	Colorado Income Tax	Colorado Income Tax	0.00	G/L Account		
	9/12/2022		G00389	G/L Account	20106	Colorado Unemployment Tax	Colorado Unemployment Tax	0.00	G/L Account		
	9/12/2022		G00389	G/L Account	20103	Federal Taxes (941/944)	Federal Taxes (941/944)	0.00	G/L Account		
	9/12/2022		G00389	G/L Account	20104	Federal Unemployment (940)	Federal Unemployment (940)	0.00	G/L Account		

Number of Lines Balance Total Balance

11 0.00 0.00

Deferrals

A postponement of an action or event




The screenshot shows the 'Deferral Templates' page in Dynamics 365 Business Central. It features a table with columns: Deferral Code, Description, Deferral Account, Deferral %, Calc. Method, Start Date, No. of Periods, and Period Desc. Three templates are listed: PP EXP, PP RENT, and PP INSURAN.

Deferral Code ↑	Description	Deferral Account	Deferral %	Calc. Method	Start Date	No. of Periods	Period Desc.
PP EXP	Prepaid Expenses	10550	100	Straight-Line	Posting Date	12	Prepaid Expenses
PP RENT	Prepaid Rent	10500	100	Straight-Line	Beginning ...	1	Prepaid Rent
PP INSURAN	Prepaid Insurance	10600	100	Straight-Line	Beginning ...	12	Prepaid Insurance

- **General Ledger**
 - G/L Deferral Summary
- **Sales**
 - Sales Deferral Summary
- **Purchasing**
 - Purchasing Deferral Summary



Recurring General Journal

 Dynamics 365 Business Central

← Recurring General Journals

Batch Name DEFAULT

Manage Home Line | More options

 Post |  Allocations

	Recurring Method	Recurring Frequency	Posting Date	Document Type	Document No.	Account Type	Account No.	Description
→	F Fixed ▾		4/22/2022			G/L Account		

Recurring purchase/sales lines

The screenshot displays the Dynamics 365 Business Central interface. The top navigation bar includes the text "Dynamics 365 Business Central" and a user profile icon labeled "Envir Sand". The main header area shows "CRONUS USA, Inc." and "Finance". Below this, a navigation menu lists "Customers", "Vendors", "Items", and "Bank". A notification banner states "This is a sandbox environment for test". A "Get started" button is visible. A search bar at the top right contains the text "recurring lines". Below the search bar, a list of results is shown under the heading "Go to Pages and Tasks". The results are as follows:

Go to Pages and Tasks	
> Recurring Sales Lines	Administration
> Recurring Purchase Lines	Administration

Working with dates

Edit - My Settings - KRISTEN

Role

Business Manager Evaluation

...

Company

CRONUS USA, Inc.

...

Work Date

9/15/2022

Region

English (United States)

...

Language

English (United States)

...

Time Zone

(UTC-07:00) Mountain Time (US & Cana...

...

Notifications

Change when I receive notifications.

Teaching Tips

☒

Files

Cloud Storage

Kristen Hosman's files on OneDrive

Security

Your last sign in was on 09/14/22 10:54 PM.

OK

Cancel

Bank Accounts

TEST 08232022		Finance	Cash Management	Sales	Purchasing	MEC	
Bank Accounts:		All	Search	+ New	Delete	Process	Report
Notifications: 2 You can use the Envestnet Yodlee Bank Feeds extension t... This page contains sensitive business data. You can set ...							
No. ↑	Name	Bank Account Linking Status	Phone No.	Cont...	Balance	Balance (\$)	
CC	Credit Card	Linked			0.00	0.00	
CHECKING	1st Bank Checking	Not Linked			7,815.04	7,815.04	
SAVINGS	1st Bank Savings	Not Linked			3,001.90	3,001.90	

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Using Hotkeys (Keyboard Shortcuts)

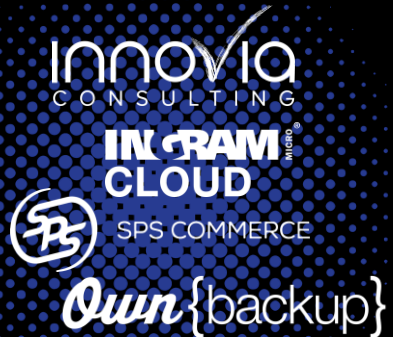
- Anytime you can keep your hands off the mouse you'll speed up data entry
- Hotkeys are less useful in BC than NAV, but are still valuable
- To get a list of keys, from Role Center use Help (Ctrl+F1) and select "Keyboard Shortcuts"

Common/Useful Hotkeys

- Alt+Q – “Tell Me” (functionality search)
- Tab/Arrow keys/Enter - navigate
- Esc – close page / search
- Ctrl+Alt+F1 – inspect page
- F3 – search, Alt+F3 – filter to cell / unfilter
- Y/N – yes/no on confirmation messages
- Shift+Ctrl+F12 – focus mode, Alt+F2 - factbox
- Alt+T – settings
- Ctrl+Enter – “OK”/close window (most times)

Demo

Overview of Useful Hotkeys



Personalizing Business Central

- Why personalize your environment?
- To efficiently obtain meaningful information from BC
- Key areas of personalization:
 - Adjusting notifications
 - Hiding and showing menus (links), columns, parts
 - Setting Quick Entry
 - Creating views (especially with advanced filters)

Demo

Adjusting Notifications
Basic Personalization
Quick Entry



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Quick Browser Tips

- **Use browser functionality to:**
 - Zoom
 - Open pages in new tabs/windows
 - Add bookmarks



Demo

Opening New Tabs/Windows
Creating Bookmarks



Creating Views

- Reports suck, use views
- There are several different types of “Views” in the system:
 - “Built-in” views (e.g., views on Item List)
 - User-defined views
 - Browser bookmarks

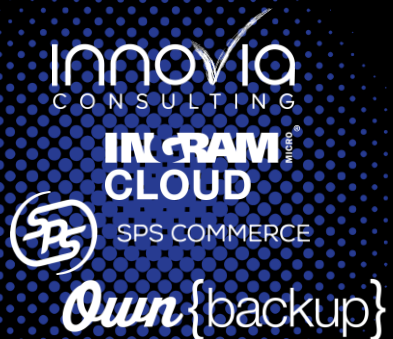
Advanced Filters

- Used to extract data more efficiently
- Can be saved as views to create “live reports”
- Common expressions include:
 - *, ? Are wildcards, e.g., “ABC*” or “AB?D*”
 - The | symbol “ors” values , e.g., “5|6”
 - The & symbol “ands” values, e.g., “A*&*B”
 - .. (two periods) specifies a range of values , e.g., “5..8”
 - <, >, =, <=, >=

Demo

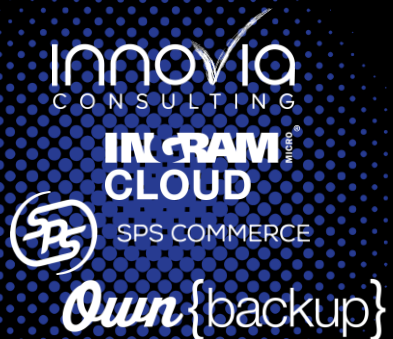
Create Simple View

Create View with Advanced Filter



Thank you DynamicsCon and Sponsors

See you in 2023!



The 'DYNAMICS CON LIVE' logo, where 'DYNAMICS CON' is in yellow and 'LIVE' is in blue. The text is set against a dynamic background of blue and yellow splashes and dots.