A Beginner's Guide to using Microsoft Dynamics 365 Business Central

Microsoft Dynamics 365
Business Central

By Aaron Gould

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Introduction

Welcome to the tutorial on getting started with Microsoft Dynamics 365 Business Central. This tutorial is designed for users who are new to Business Central and want to learn the basics of navigating the interface, managing customers, vendors, items, sales orders, and purchase orders. It is important to understand the basics of each process to gain knowledge of the Sales Order processing cycle.

Microsoft Dynamics 365 Business Central offers a business management solution that assists companies with keeping their financials, sales, services, inventory, and operations in one accessible cloud service. This means you can access it from any computer with an internet connection. Since all your information is in one database, this helps streamline business processes, improve customer satisfaction, and collect data to run reports.

Getting Started

To start using Microsoft Dynamics 365 Business Central, you will be set up with a Microsoft Outlook email and password to use on a computer to log into Business Central. The IT Department will provide you with your credentials.

To get started in Microsoft Dynamics 365 Business Central, follow these steps:

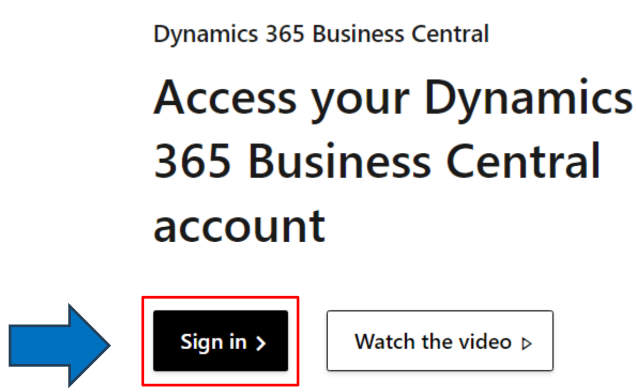
Accessing the site:

1. Open your web browser and type in the address bar

   https://businesscentral.dynamics.com/

Signing in:

1. Once you accessed the site, Click "Sign in".



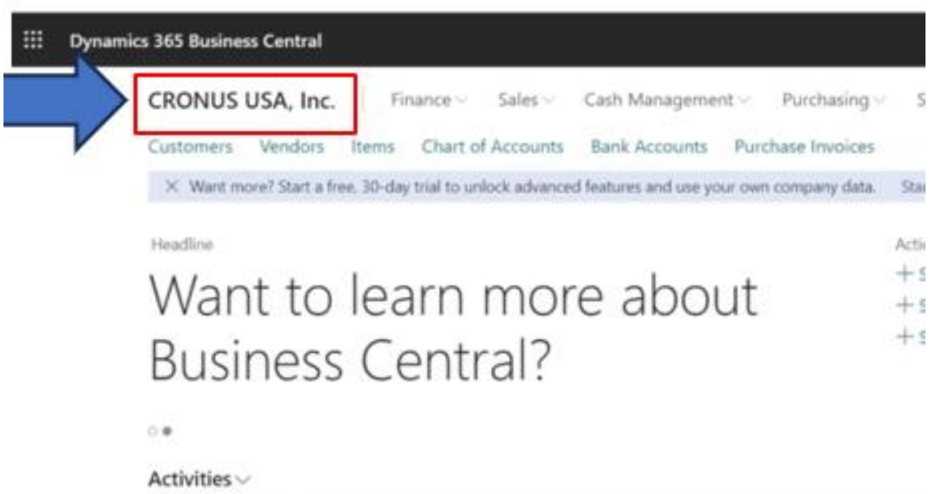
2. Enter your email and password provided and sign in.

You will be redirected to the Business Central dashboard. This landing page is where you will see company metrics and navigate around with.

Navigating the Dashboard:

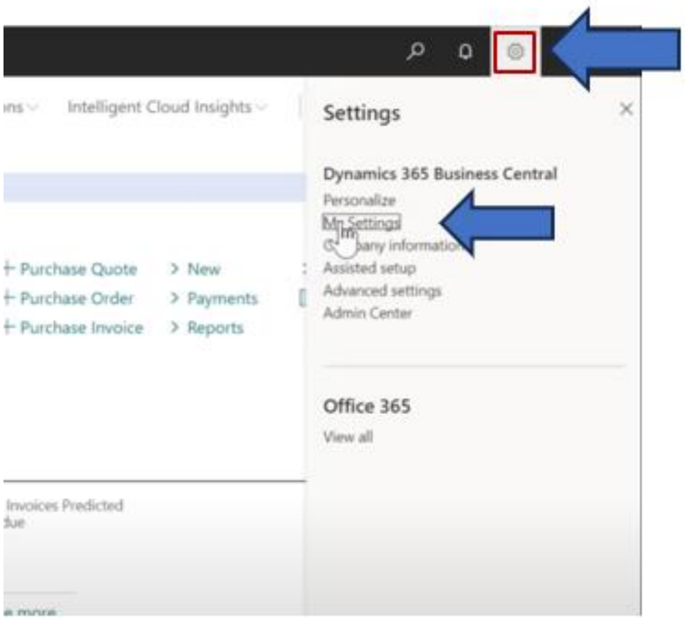
It is important to get familiar with the dashboard, so you know how to get around.

In the upper left corner, you can access the dashboard at any time by clicking the "company name". From here you can go to Customers, Vendors, Items, and more!



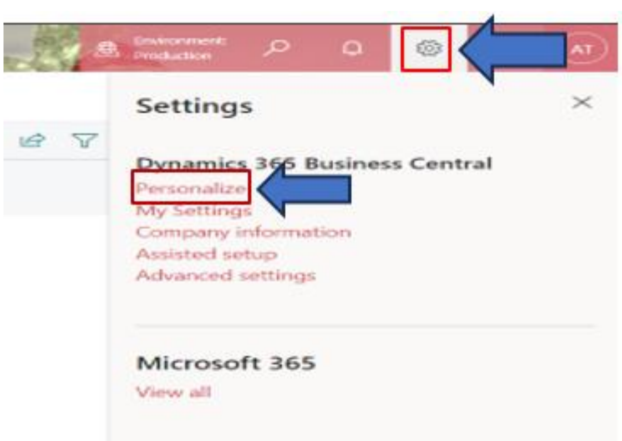
Accessing User Settings:

1. In the upper right corner, go to the settings by clicking the “cog” and then click “My Settings”.

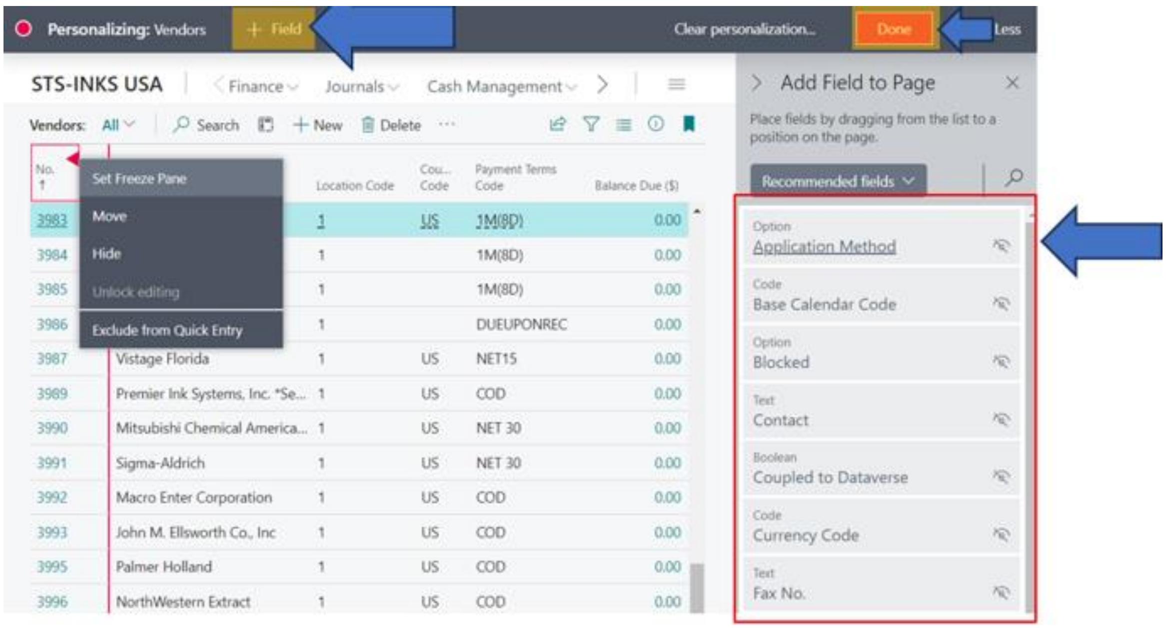


Personalizing the Dashboard:

1. In the upper right corner, click on the “cog” and then click “Personalize”.



2. Here, you can personalize your dashboard by clicking “+ Field” to add fields to the page that you desire. A “field” will add to your interface, so you can personalize it. You can also hide, move, and rearrange fields to further customize. For now, the default settings will do. Click “Done”.

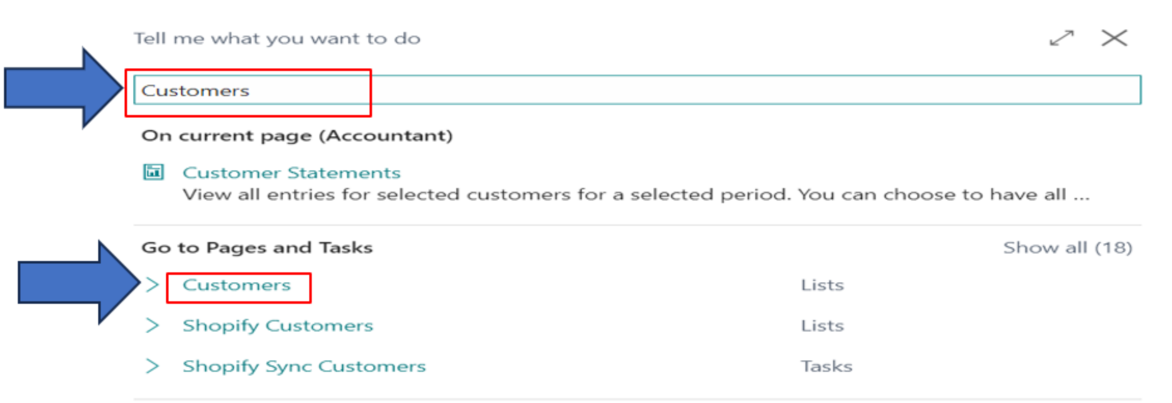


Search:

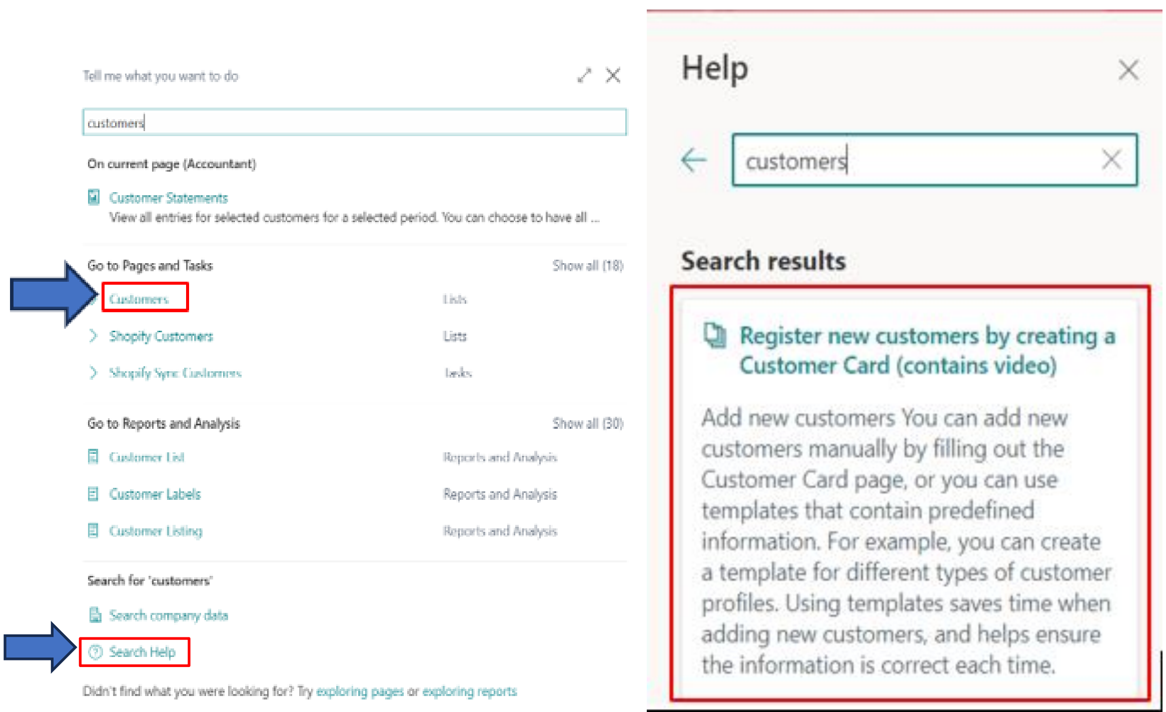
The search function is a strong tool to navigate around with. Follow these steps to learn how to use it:

1. In the upper right corner, click on the “magnifying glass” to Search.

2. In the search bar, type “Customers” as an example.
With search, you can navigate to any part of the system.



3. Another good use of the Search tool is to get help. If you click on “Search help” when searching what you want to do, it will give you helpful results for that task.



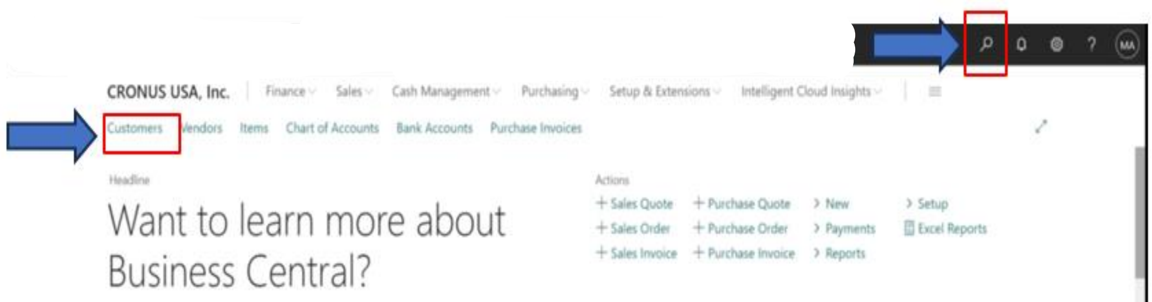
Managing Customers

As a business you need customers. In this section, you will learn how to navigate to, add, edit, and view customers transactions.

To manage customers, follow these steps:

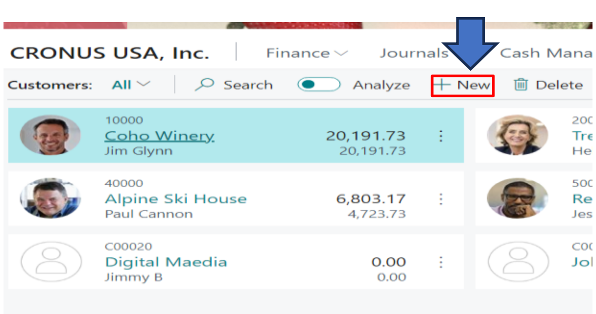
Navigating to Customers:

To navigate to Customers, click on “Customers” on the dashboard or use “Search”. This will take you to “Customers” where you will be able to add, edit, and view all your customers in one place.

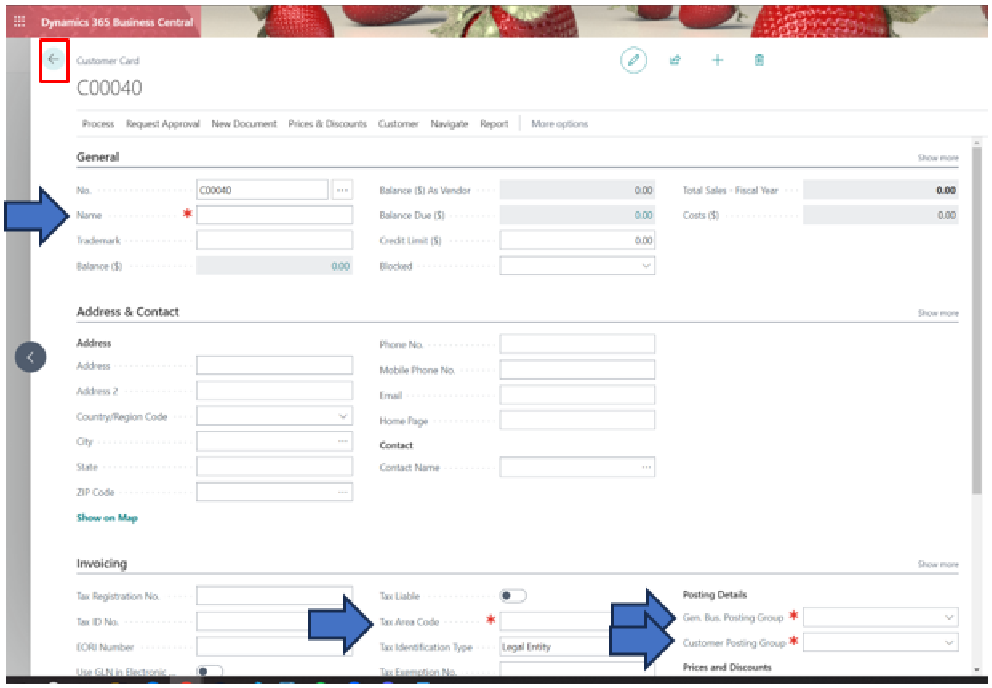


Adding a Customer:

1. To add a new customer, click “+New” on the Customers page.



2. A new customer card was created. It will automatically assign a No. to it, or you can customize it. In the required fields, enter the information needed.



Hint: You can click “Show more” for additional information regarding that field.

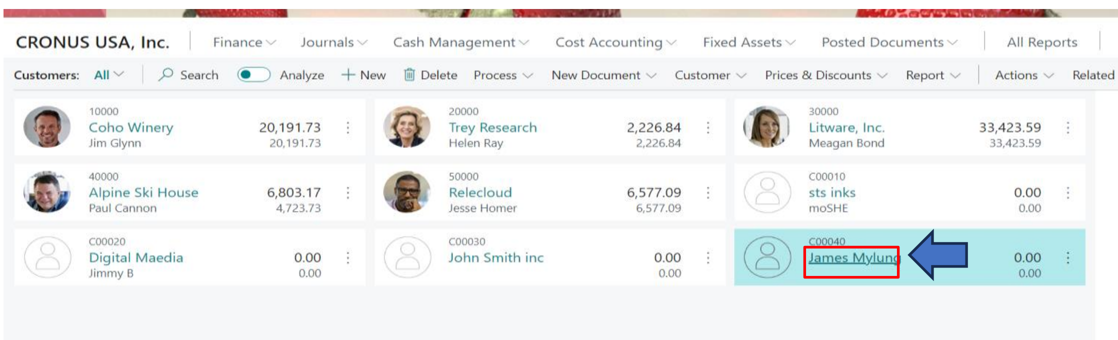
3. Now that you have entered the information for that Customer, navigate back to Customers by clicking the left arrow in the upper left corner.

Here you can see you have successfully added a new customer.

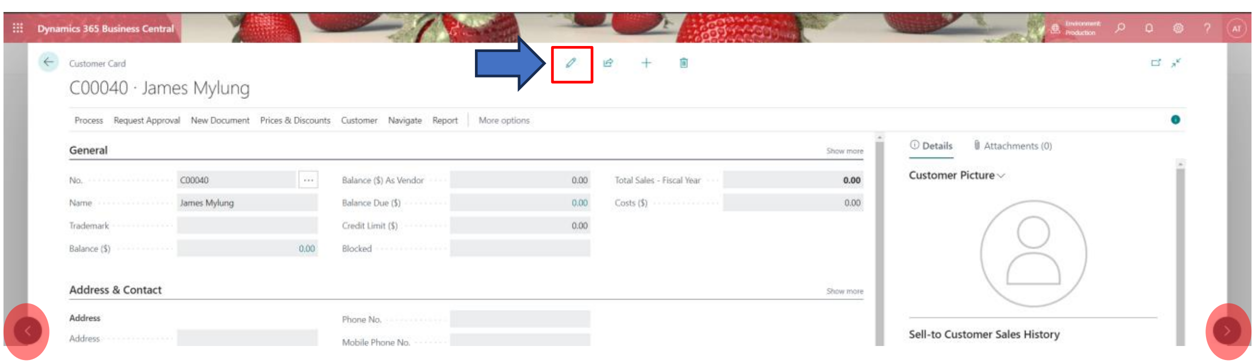
Editing Customers Information:

Now that you have learned how to add a customer, you can now edit that customer card. Since you only input the required information let's go back to that customer card and edit it.

1. Navigate to the customer card you added and click on their "name" to open the customer card.



2. To edit, click on the "pencil" icon. If the fields are greyed out, that means you are in view only mode. Now, you are ready to edit the customer.



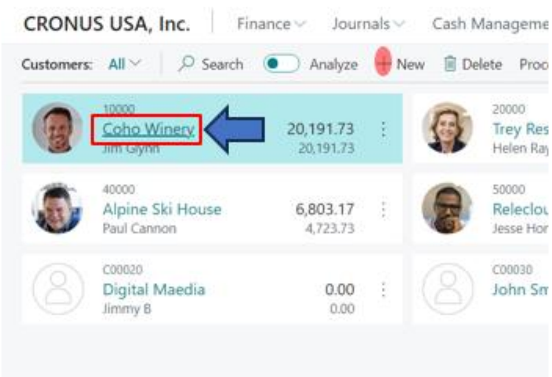
Hint: Notice the left and right arrows on the customer card? You can navigate between customers by clicking either arrow.

Viewing Customers Transactions:

Business Central makes it simple to navigate around by including back arrows, quick links, and using search. You can navigate to the customers transactions by going to their customer card.

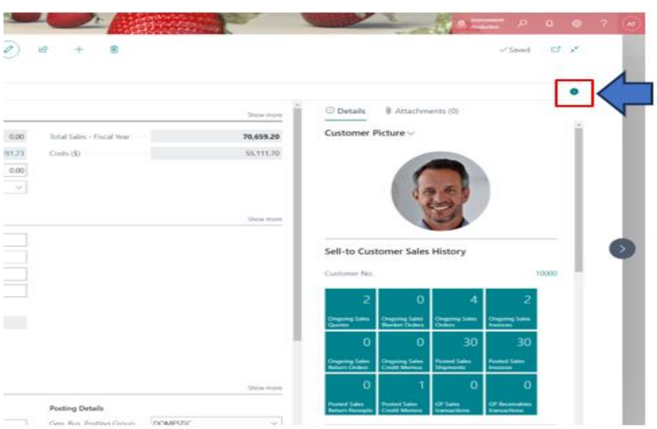
1. Navigate to "Customers".

2. Click a "customers name" to view the customer card.

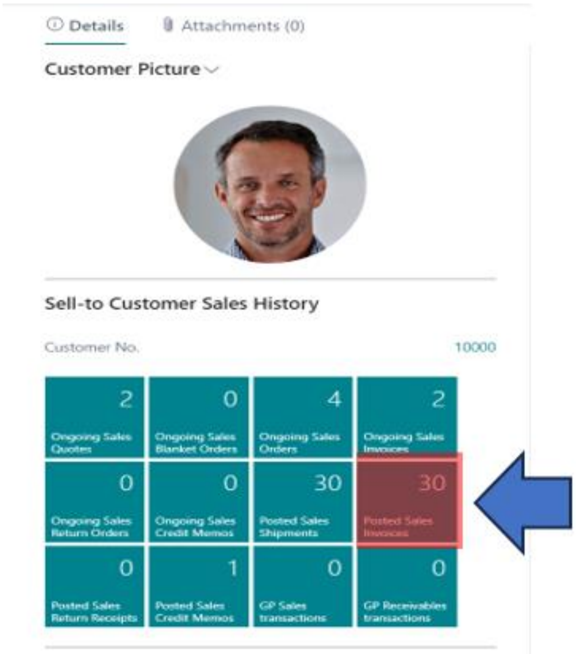


Hint: You can view, edit, and delete customers by clicking the three dots on their card.

3. Now, click on the "circled i" in the upper right to expand the Details pane. The pane on the right side will appear.



4. To view customer transactions, click on the "Posted Sales Invoices" box.



Hint: You can navigate to the customers sales orders, quotes, and shipped orders here as well.

Managing Vendors

Vendors are companies that you buy products and services from. Just like customers, you will learn how to navigate to, add, edit, and view vendors transactions.

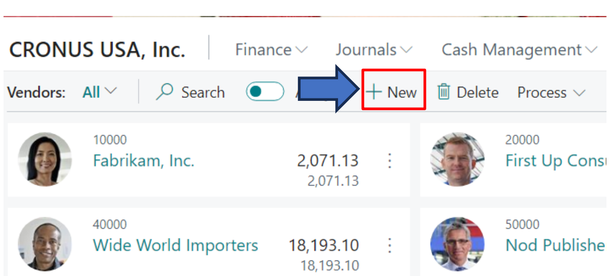
To manage vendors, follow these steps:

Navigate to Vendors:

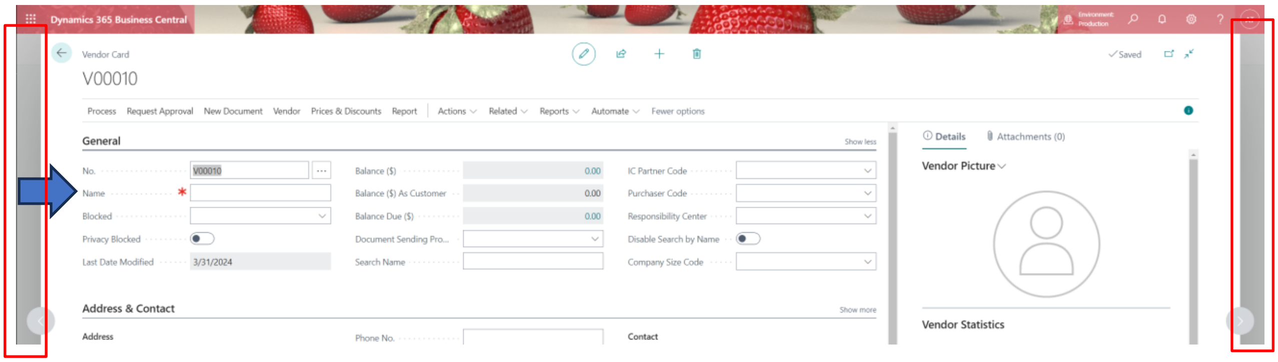
On the Business Central dashboard, click on “Vendors”.

Adding a Vendor:

1. To add a new vendor, click “+New” on the Vendors page.



2. A new vendor card was created. It will automatically assign a No. to it, or you can customize it. In the required fields, enter the information needed.

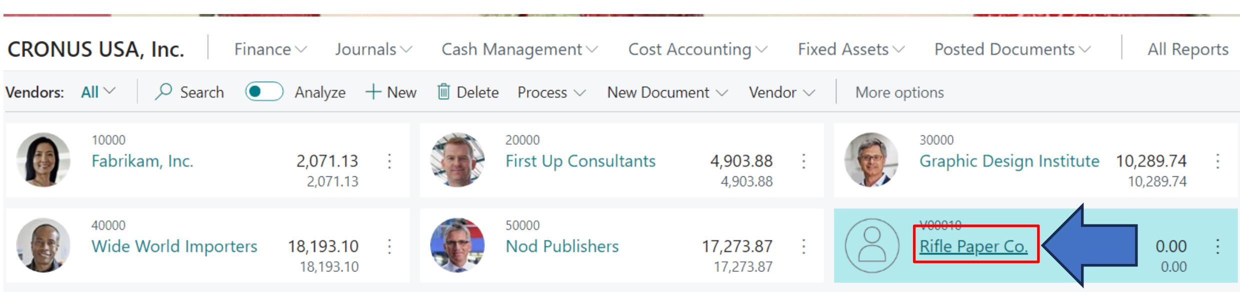


Hint: You can click on the outside of the card to go to the last page you were on.

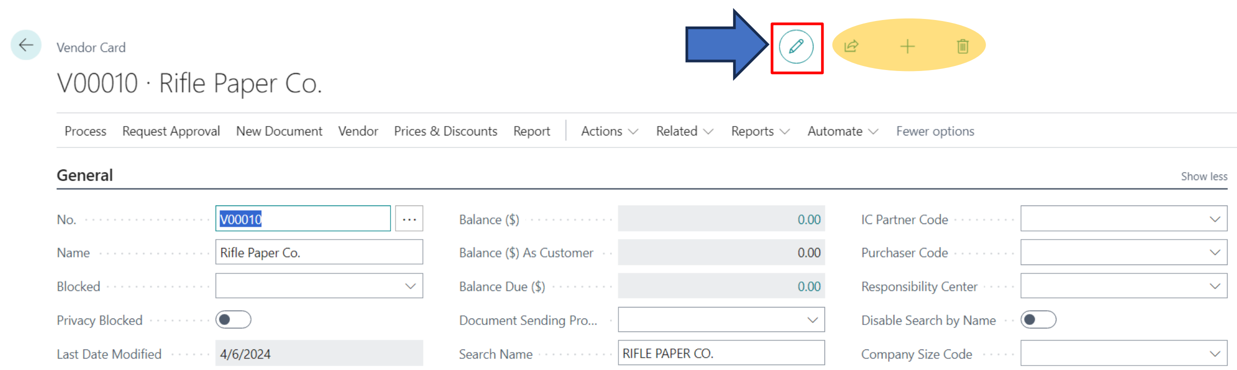
Editing Vendor Information:

Now that you've learned how to add a vendor, you can also edit vendor information if needed. Let's go back to the vendor card you added and edit it.

1. Navigate to the vendor card you added and click on their name to open the vendor card.



2. To edit, click on the pencil icon. If the fields are greyed out, that means you are in view-only mode. Now, you are ready to edit the vendor.



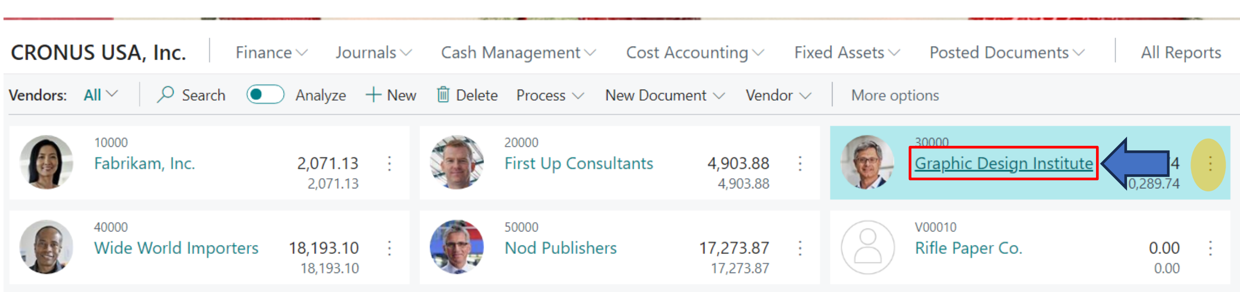
Hint: You can also delete, add, or share vendor cards with other users using the icons next to edit.

Viewing Vendor Transactions:

Like customers, you can view vendor transactions easily in Business Central to see recent orders made to that vendor.

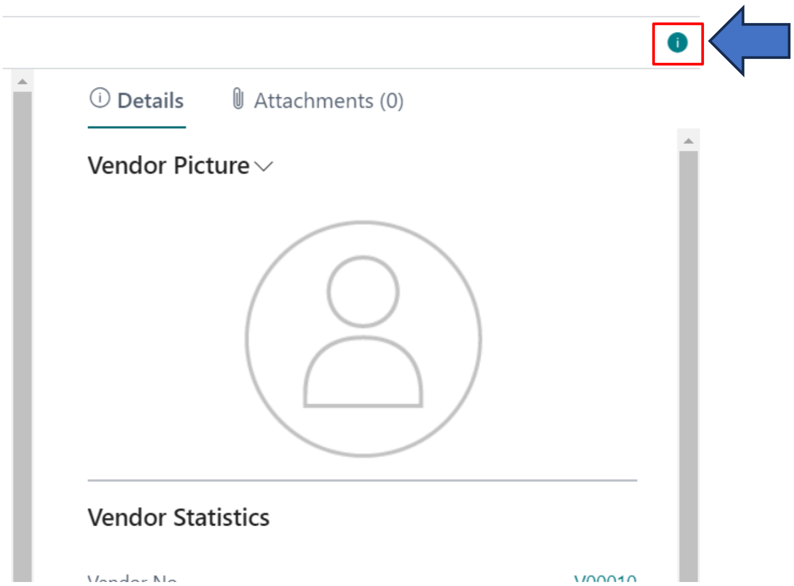
1. Navigate to "Vendors".

2. Click on a vendor's name to view the vendor card.



Hint: If you click on the “three dots” on the vendor card, you can also view, edit, or delete the vendor.

3. Click on the “circled i” in the upper right to expand the Details pane. The pane on the right side will appear.



4. To view vendor transactions, click on the "Posted Receipts" box.

Hint: You can also view purchase orders, quotes, and invoices here.

Managing Items

Items are products or services that you buy, sell, or keep in inventory. In this section, you will learn how to navigate to, create, edit, and view item details.

To manage items, follow the steps below.

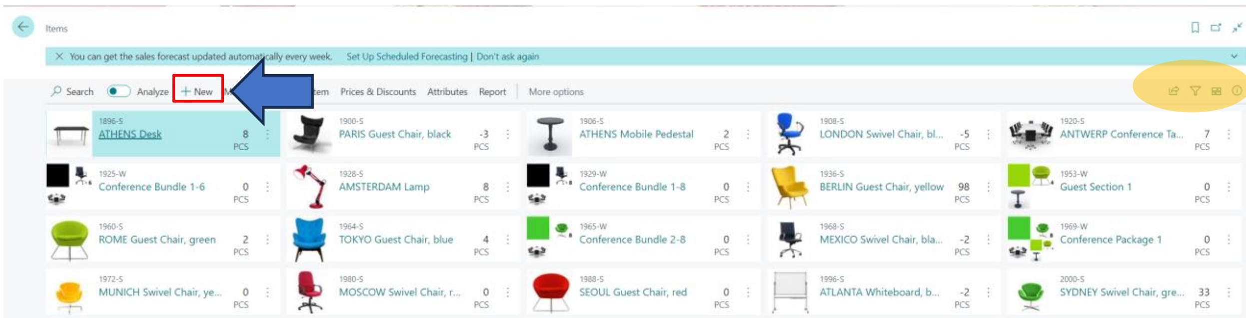
Navigating to Items:

On the Business Central dashboard, click on "Items".

Hint: You can search for “Items” also.

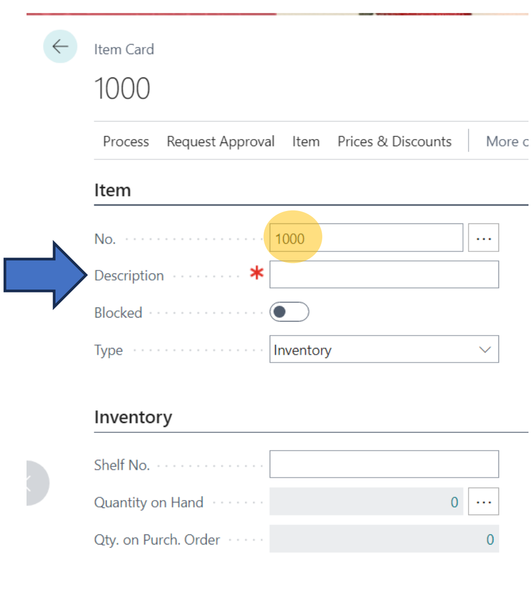
Creating Items:

1. To create a new item, click "+New" on the Items page.



Hint: You can customize the layout by clicking the “blocks” on the right to change from tiles to a list.

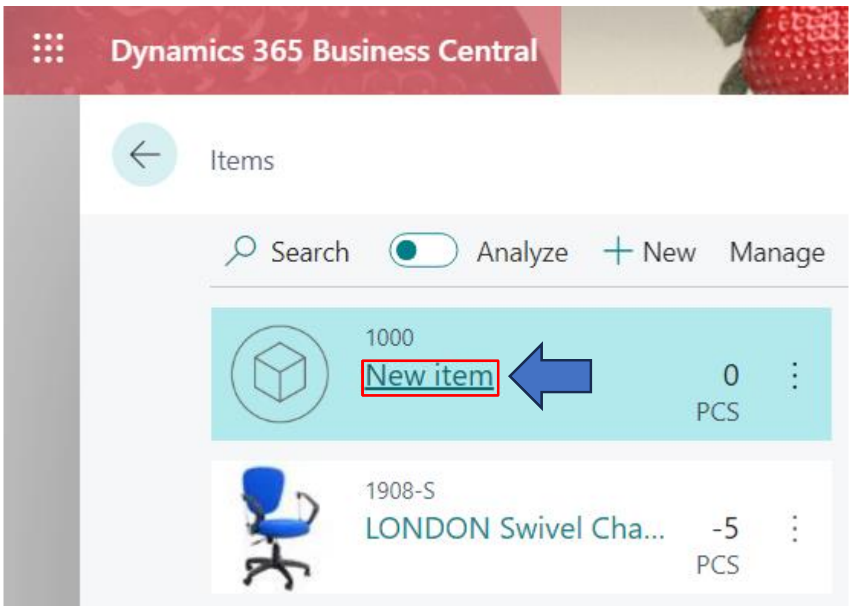
2. A new item card will be created. It will automatically assign a No. to it, or you can customize it. In the required fields, enter the information needed.



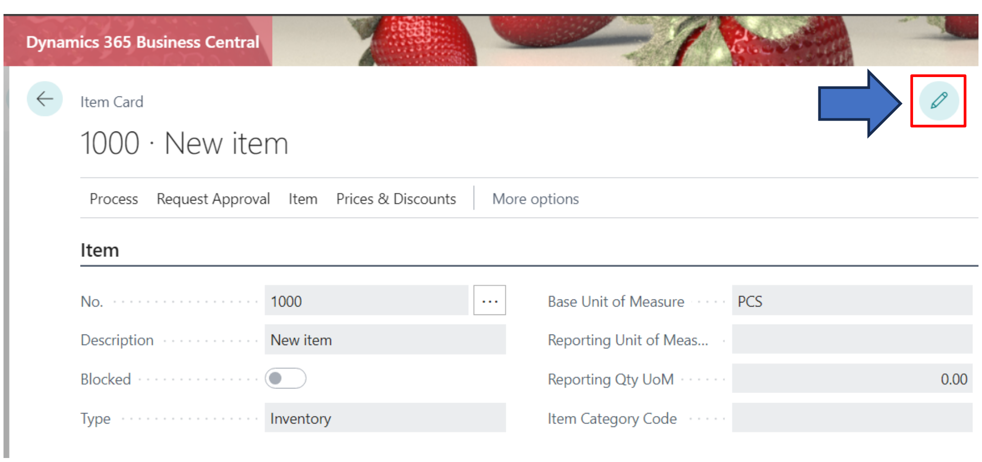
Editing Item Information:

Like customers and vendors, you can also edit item information if needed. Let's go back to the item card you added and edit it.

1. Navigate to the item card you added and click on its "name" to open the item card.



2. To edit, click on the "pencil" icon. If the fields are greyed out, that means you are in view-only mode. Now, you are ready to edit the item.



Managing Sales Orders

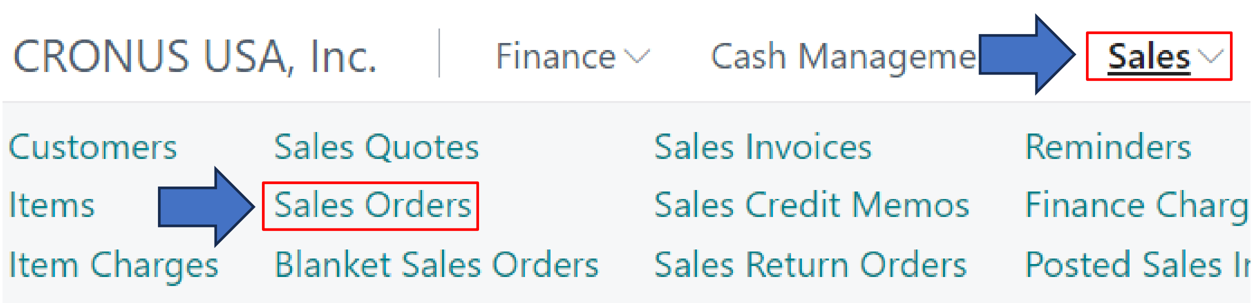
Sales Orders are documents that customers use to request goods or services from your company. In this section, you will learn how to create, edit, delete, ship, and post sales orders.

To manage sales orders, follow the steps below.

Navigating to Sales Orders:

1. Click on "Sales" on the top of your screen.

2. Then, click on "Sales Orders".

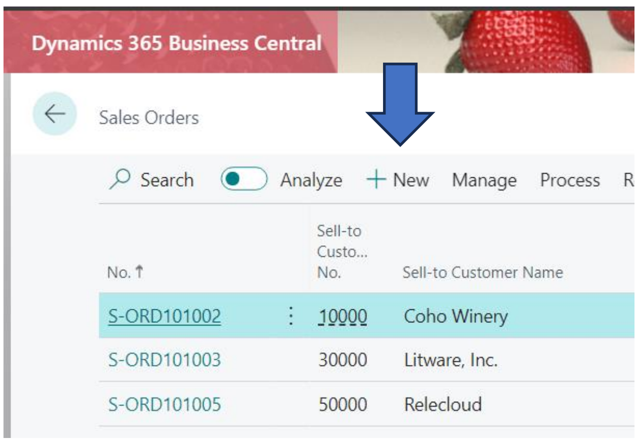


Creating Sales Orders:

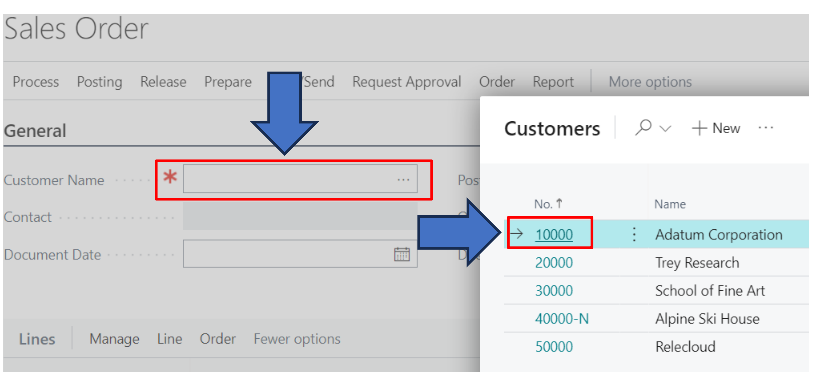
A customer sends you a request for goods and services using a purchase order, email, online, over the phone, and in-person.

1. Navigate to "Sales Orders".

2. Click "+New" to create a new sales order.



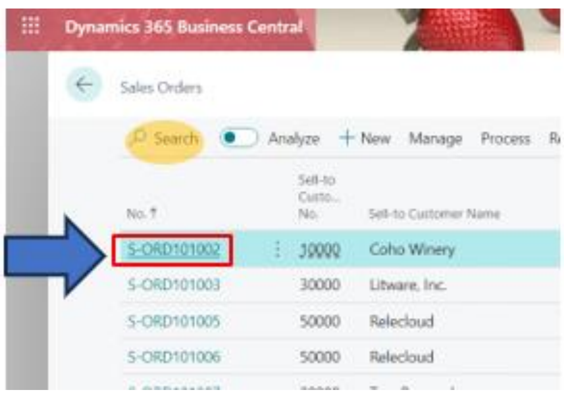
3. Click on the "Customer Name" box to show customers. Click on a "Customers number" to select them.



Editing Sales Orders:

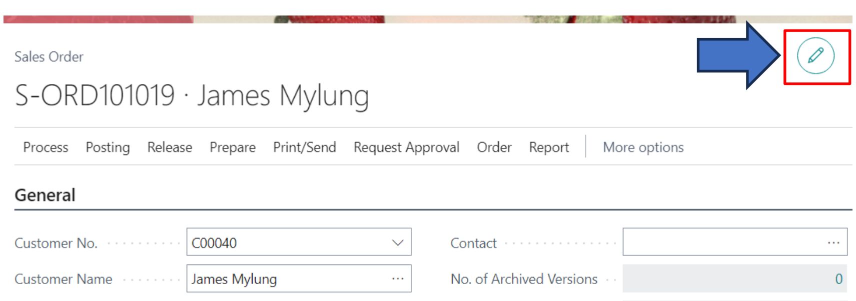
You will have to add customers, items, shipping details, and payment terms to Sales Orders.

1. Navigate to “Sales Orders”. Click on the “Sales Order Number” to open the Sales Order.



Hint: You can also search for the Sales Order by clicking “Search”.

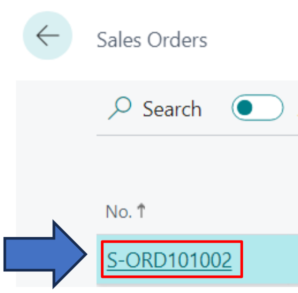
2. Click on the “edit” button at the top of the Sales Order.



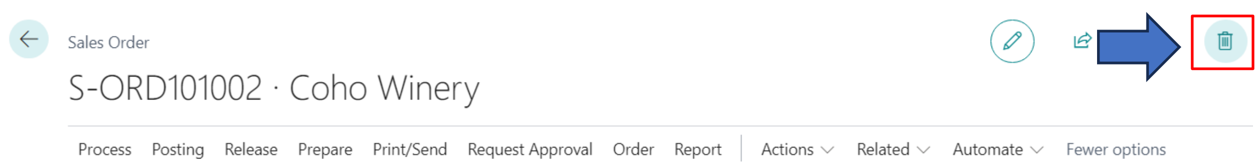
Deleting Sales Orders:

1. Navigate to “Sales Orders”.

2. Click on the “Sales Order No.” to open it.



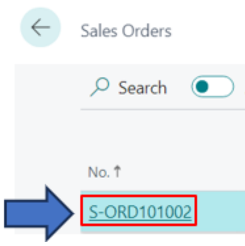
3. Click the "Delete" button to delete the sales order. Click “yes” to continue.



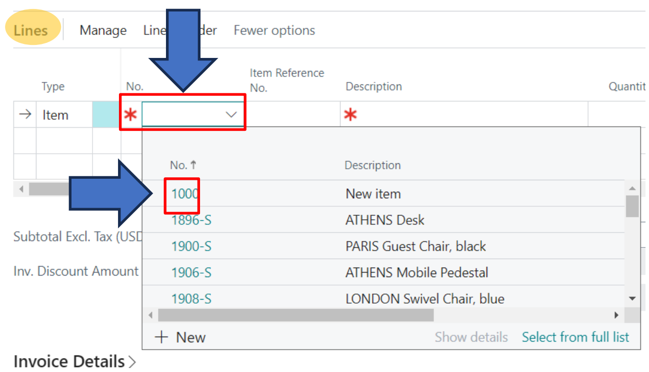
Adding Items to Sales Orders:

1. Navigate to “Sales Orders”.

2. Click on the “Sales Order No.” to open it.

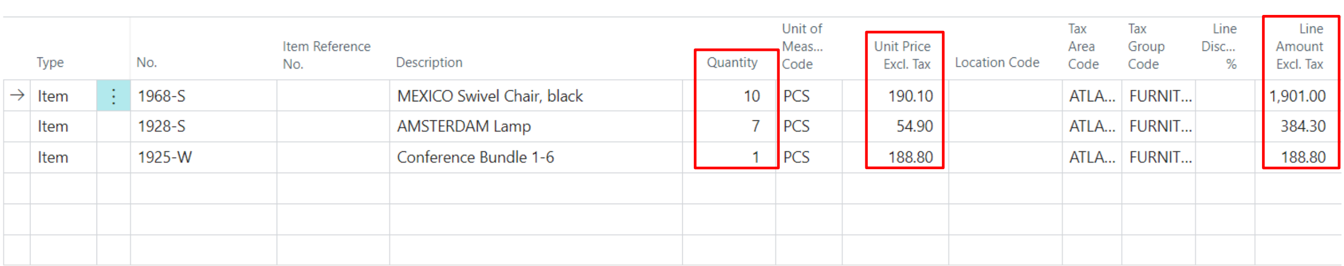


2. Scroll down to the “Lines” section. Click in the “empty box” under No. to add Items. Click on the “item no.” to select.



Hint: This box allows you to search for an item also.

3. Once added, the default settings for that item will auto populate, edit the price and quantities as necessary.



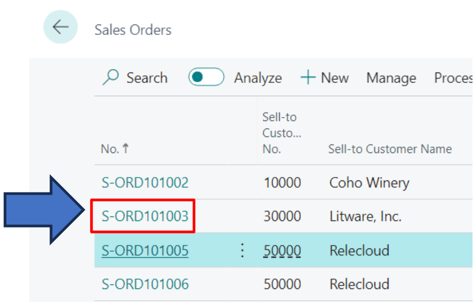
Type	No.	Item Reference No.	Description	Quantity	Unit of Meas... Code	Unit Price Excl. Tax	Location Code	Tax Area Code	Tax Group Code	Line Disc... %	Line Amount Excl. Tax
Item	1968-S		MEXICO Swivel Chair, black	10	PCS	190.10		ATLA...	FURNIT...		1,901.00
Item	1928-S		AMSTERDAM Lamp	7	PCS	54.90		ATLA...	FURNIT...		384.30
Item	1925-W		Conference Bundle 1-6	1	PCS	188.80		ATLA...	FURNIT...		188.80

Hint: The more established an item is, the more information it will have when adding to Sales Orders or Purchase Orders.

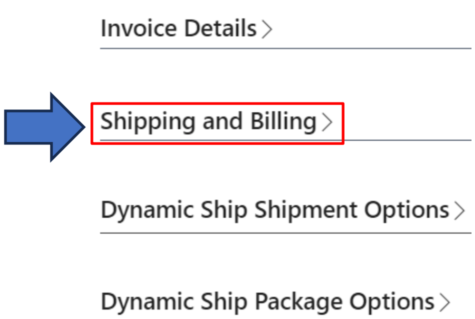
Shipping a Sales Order:

Before shipping a Sales Order, it is important to verify that the order is correct by checking the shipping and billing, items, and customers before creating a shipping label to ship the order.

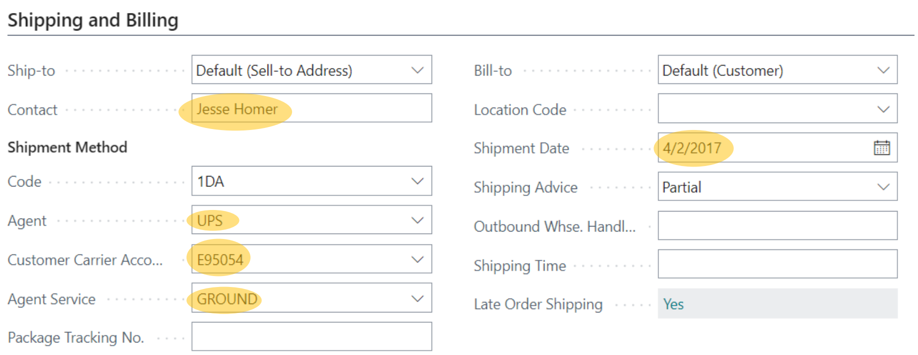
1. Navigate to the Sales Order you want to ship and click on the “Sales Order No.” to open it.



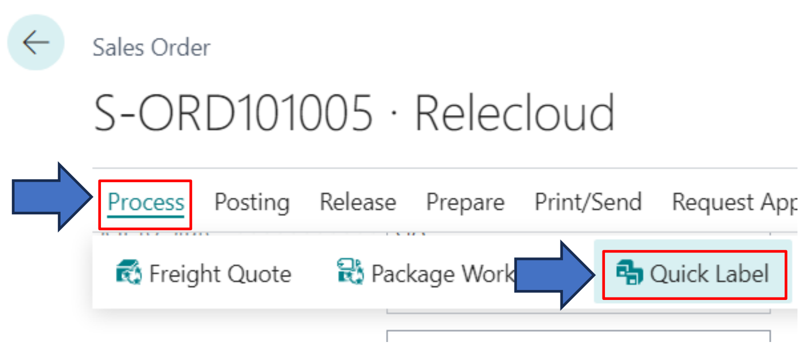
2. Click on the "Ship and Billing" button to view the shipping details. Click the “Show more” button on the right.



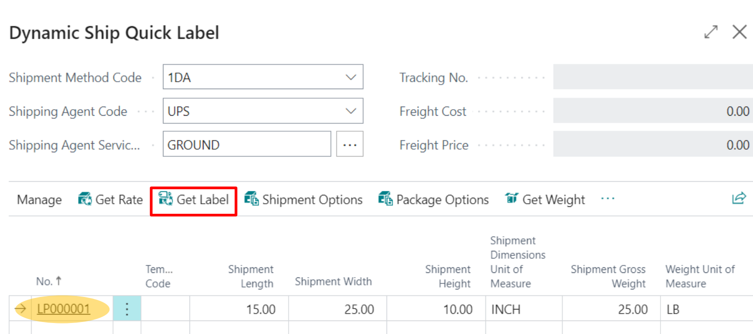
3. Verify the Shipping and Billing details are correct.



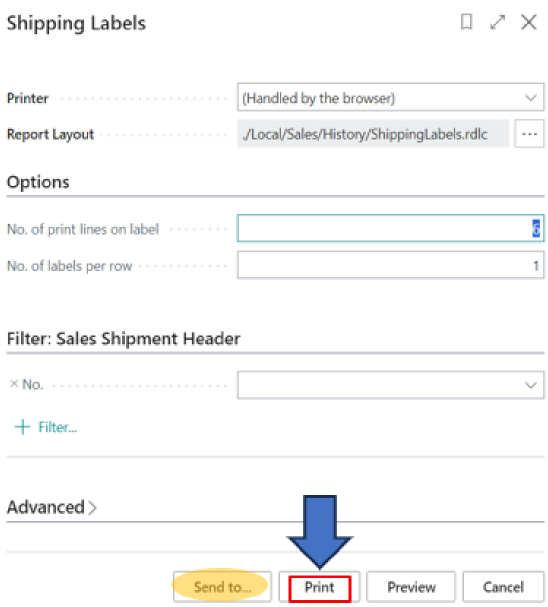
4. Click on “Process”, then “Quick Label” at the top of your screen. This will open “Dynamic Quick Ship Label” to process and print your shipping label.



5. The system will automatically recognize the items and configure the package details for you. Click on “Get label”.



6. The Shipping Labels window will pop up, click on “Print” to get your labels for your package.



Hint: You can also select “Send to” to email or save the label.

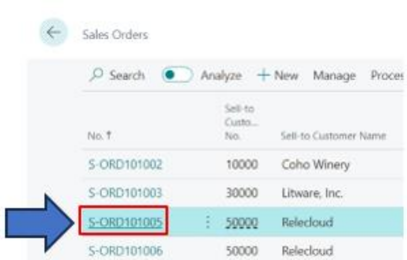
7. Apply your shipping labels to the package. You have completed shipping the sales order.

Posting a Sales Order:

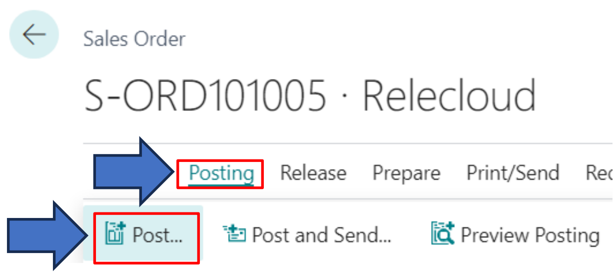
To post a Sales Order means to invoice the customer and finalize the transaction. Once posted, you cannot delete or edit the sales order.

1. Navigate to “Sales Orders”.

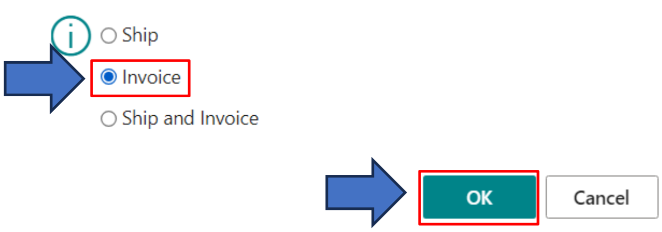
2. Click on the “Sales Order No.” to open it.



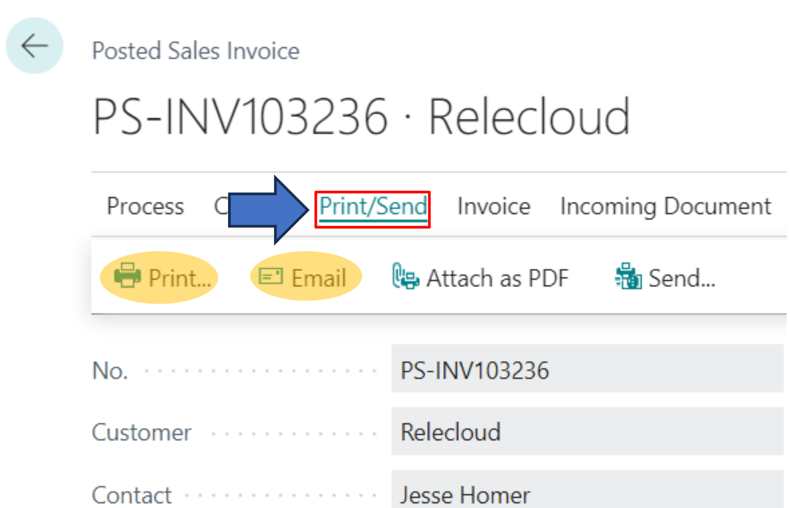
3. Click on “Posting”, then “Post” at the top of your screen.



4. Click “Invoice”, and then click “OK”.



5. The invoiced Sales Order will pop up. Click on “Print/Send”, then “Email” to send it to the customer or “Print” it for your records.



Managing Purchase Orders

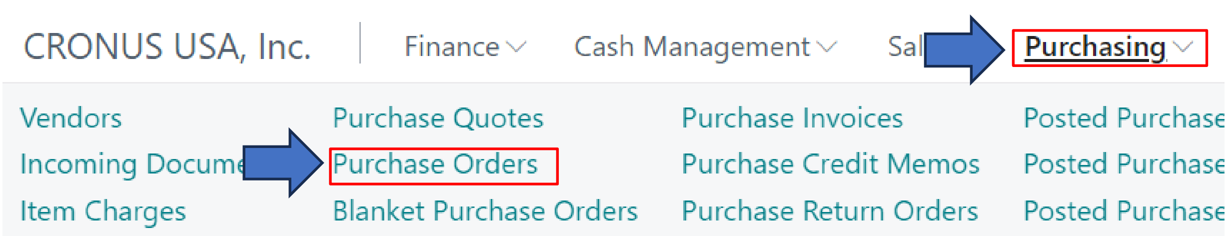
Purchase Orders are documents that the company uses to request goods and services from Vendors. After a Purchase Order is created, it gets emailed to the Vendor where they process it into their own Sales Order. In this section, you will learn how to create, edit, delete, add items, post and email Purchase Orders to Vendors.

To manage Purchase Orders, follow the steps below.

Navigating to Purchase Orders:

1. Click on “Purchasing” on the top of your screen.

2. Click on “Purchase Orders”.

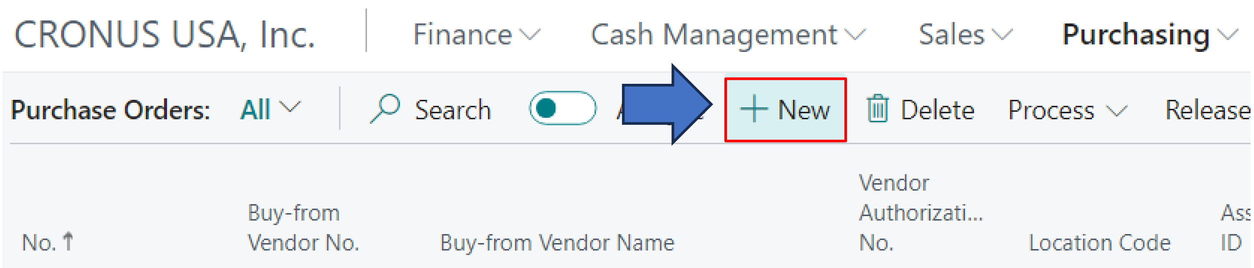


Hint: Here you can also navigate to Vendors and Purchase Invoices.

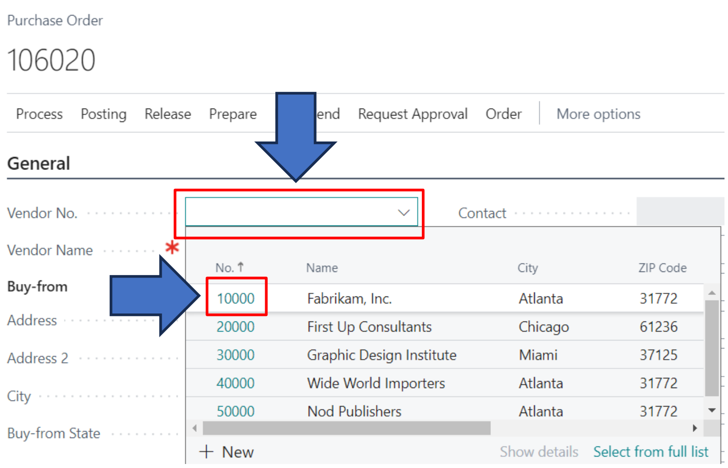
Creating Purchase Orders:

1. Navigate to “Purchase Orders”.

2. Click “+New” to create a new purchase order.



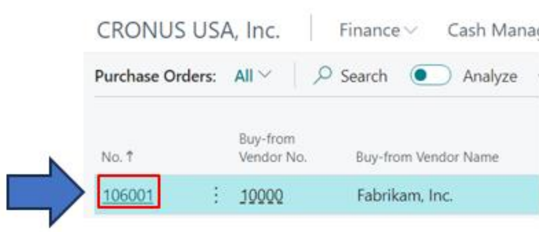
3. Click on the “Vendor No. drop down" button to show vendors. Click on “Vendors No.” to select them. It will automatically populate their information.



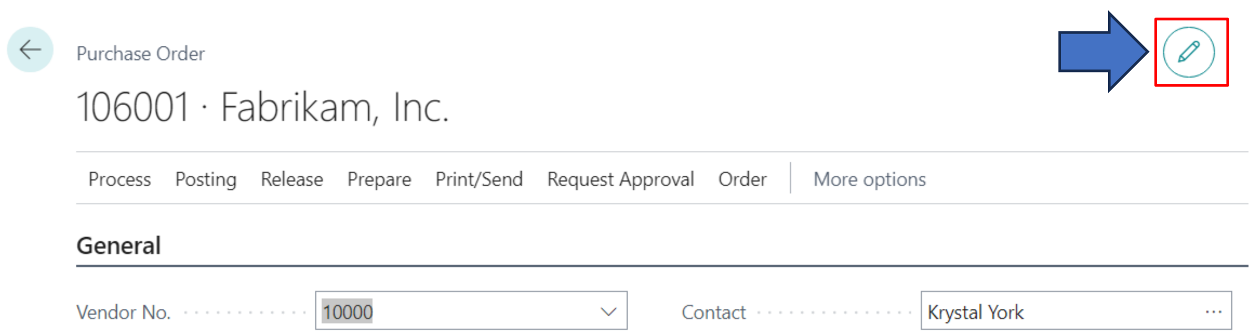
Editing Purchase Orders:

1. Navigate to “Purchase Orders”.

2. Click on the “Purchase Order Number” to open the Purchase Order.



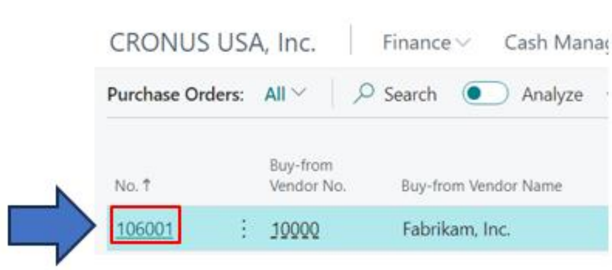
3. Click on the “edit” button at the top of the Purchase Order.



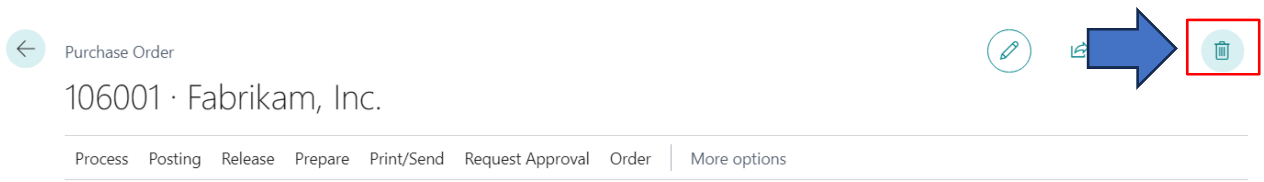
Deleting Purchase Orders:

1. Navigate to “Purchase Orders”.

2. Click on the “Purchase Order No.” to open it.



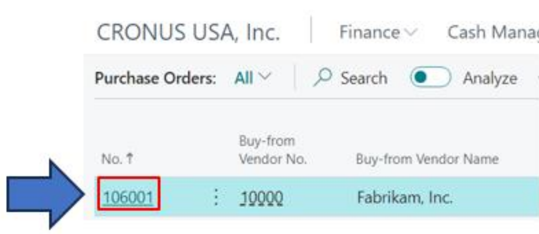
3. Click on the "Delete" button to delete the purchase order. Click “yes” to continue.



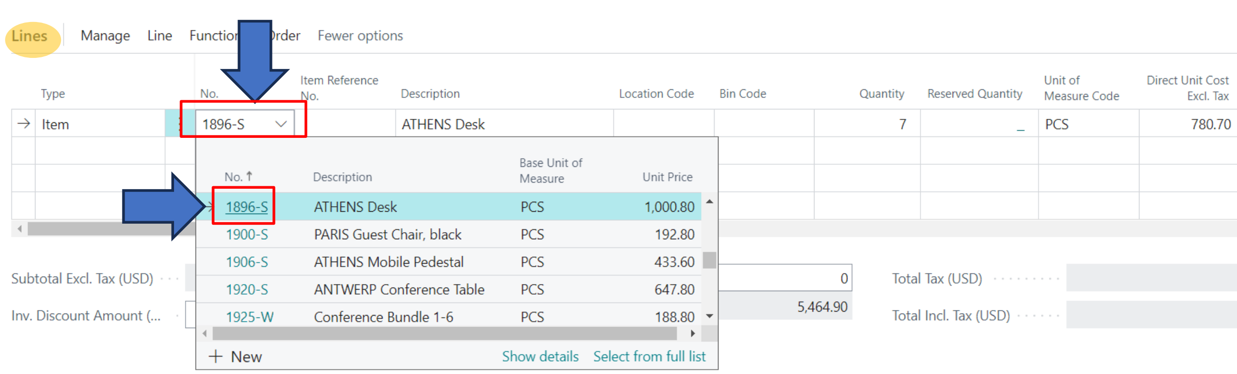
Adding Items to Purchase Orders:

1. Navigate to “Purchase Orders”.

2. Click on the “Purchase Order No.” to open it.



3. Scroll down to the “Lines” section. Click in the “empty box” under No. to add Items. Click on the “item no.” to select.

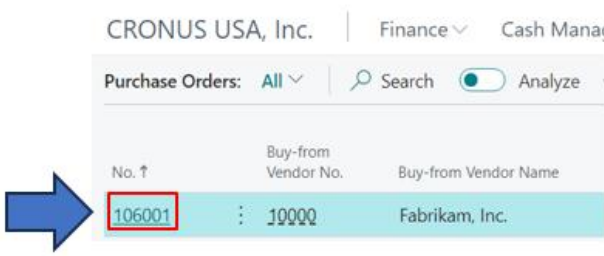


4. Once added, the default settings for that item will auto populate, edit the price and quantities as necessary.

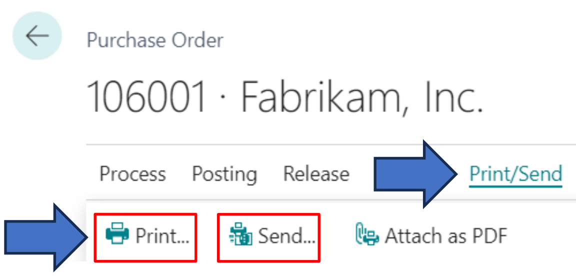
Emailing Purchase Orders:

1. Navigate to "Purchase Orders".

2. Click on the "Purchase Order No." to open it.



3. Click on "Print/Send", then "Send" to send it to the customer's email on file or "Print" it for your records.

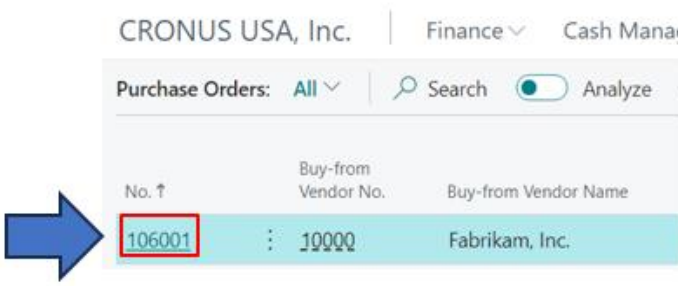


Posting Purchase Orders:

Like Sales Orders, to post a purchase order means to invoice it. You will do this process once the purchase order is received.

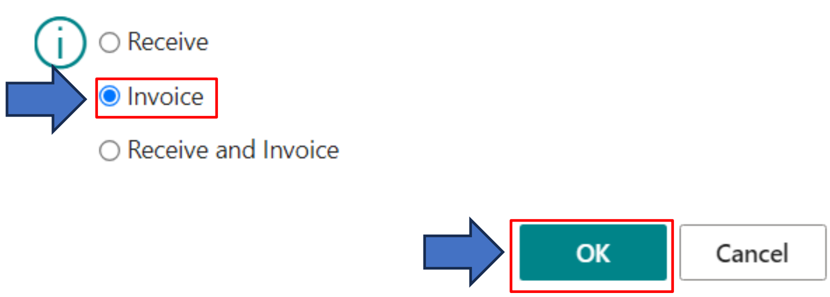
1. Navigate to "Purchase Orders".

2. Click on the “Purchase Order No.” to open it.



3. Click on “Posting”, then “Post” at the top of your screen.

4. Click “Invoice”, and then click “OK”.



Congratulations! You just completed “A Beginner’s Guide to using Microsoft Dynamics 365 Business Central” tutorial. Using these basic understandings in Sales Order Processing, you should be able to fill most entry level positions in an Operations type environment using Microsoft Dynamics 365 Business Central. It is important to take your time and ask questions as a new user. If you need to reference this tutorial, please do so. For even more in-depth training in Business Central, try to “Google” what you desire! There are videos and How-To’s explained everywhere for anyone to use as well.

Troubleshooting

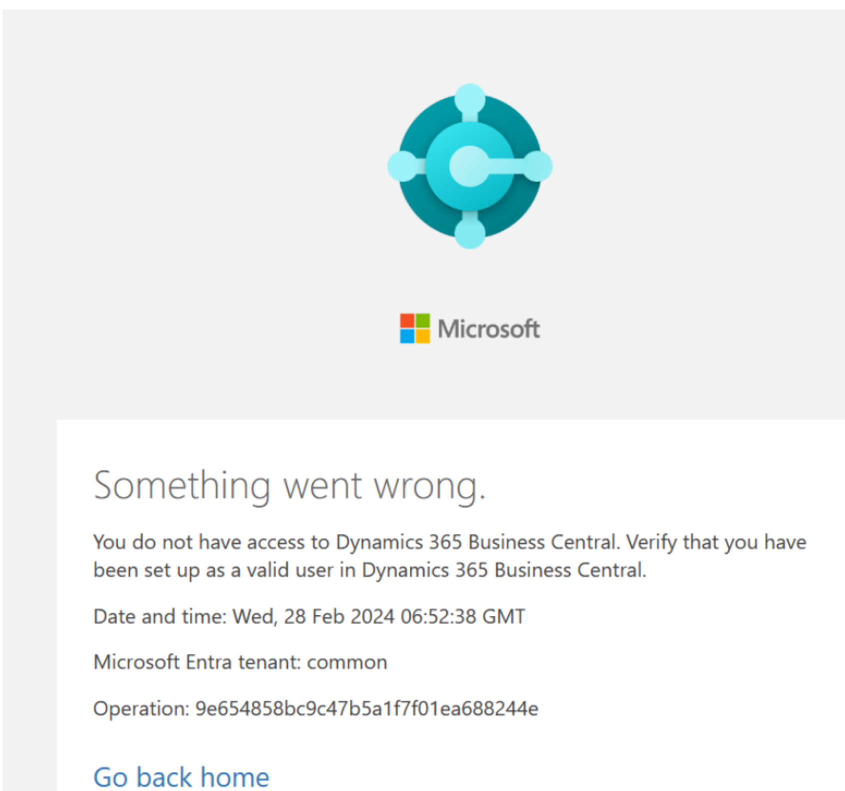
When working in Microsoft Dynamics 365 Business Central, you may come across problems. In this section, we will cover common issues, how to get help, and Frequently Asked Questions (FAQs).

To begin troubleshooting a problem, follow these steps.

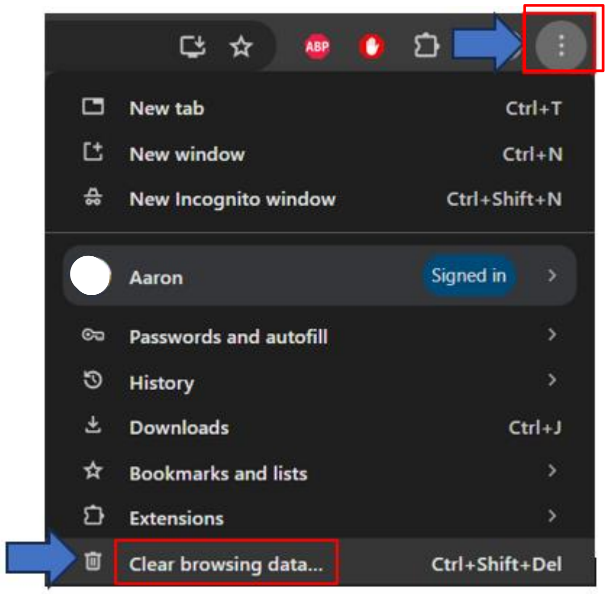
Common Issues:

Depending on what you are doing in the system, you may come across a problem. Here are a few ways to fix common issues.

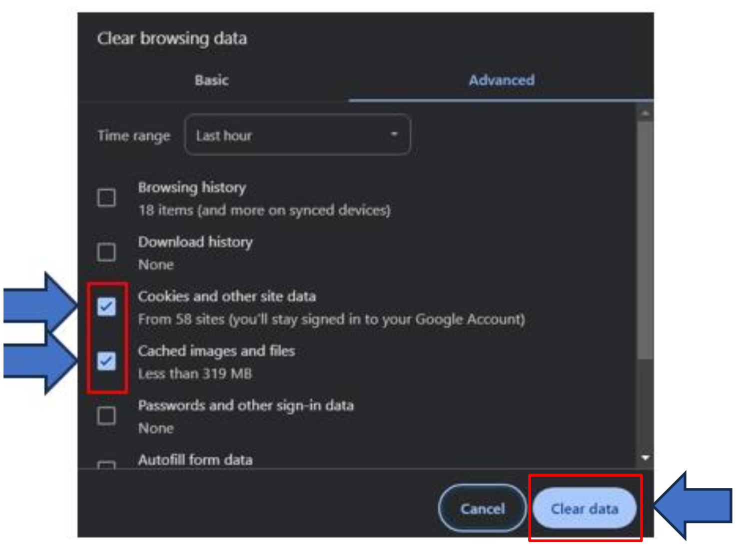
If you are having issues logging into Microsoft Dynamics 365 Business Central and get the error below, you may need to clear your cache. To clear your cache, follow these steps:



1. On your web browser, click the "dots" in the upper right corner. Click "Clear browsing data..."

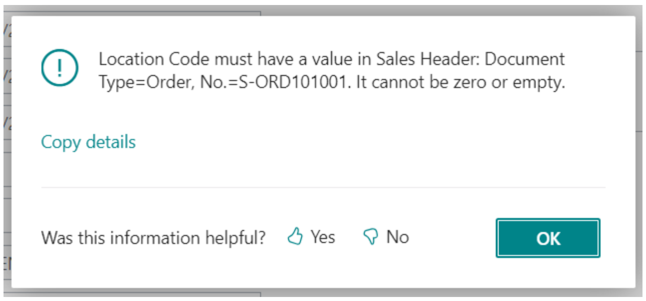


2. Click on the box for "Cookies and other side data" and "Cached images and files". Click "Clear data".



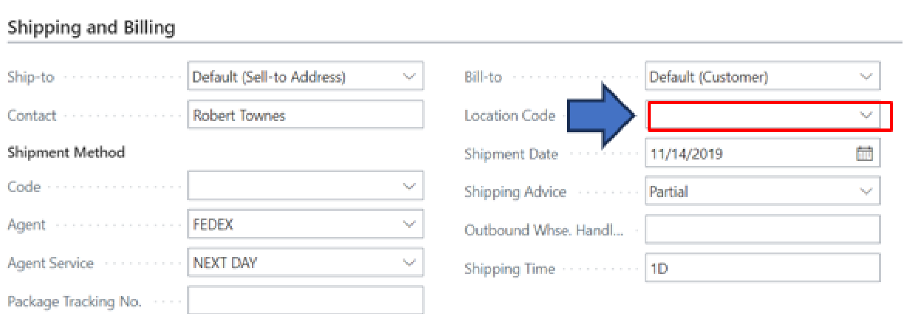
3. Try logging back into your Microsoft Dynamics 365 Business Central account.

If you are trying to process a Sales Order for shipment, and you get this popup please follow these steps:

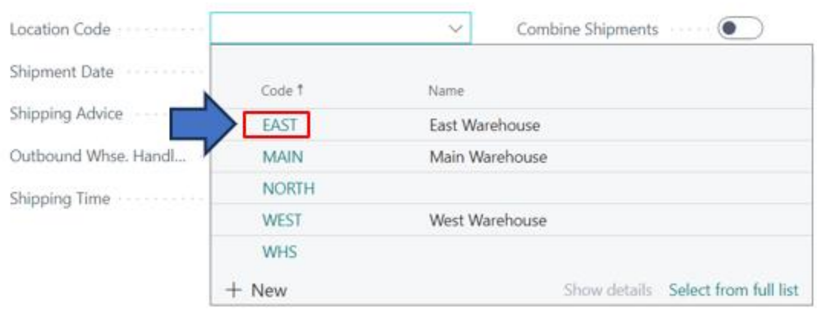


1. “Click OK”.

2. Scroll down to the “Shipping and Billing” section. Click on the Location Code” box.



3. Click on the “location” you are shipping from.



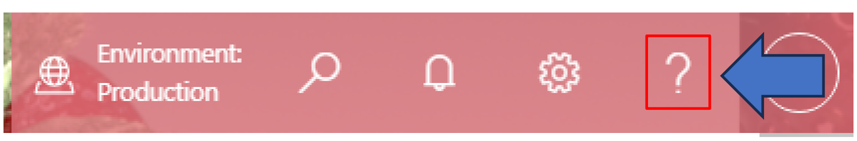
4. Retry shipping the Sales Order now. The order should now process correctly.

Getting Help:

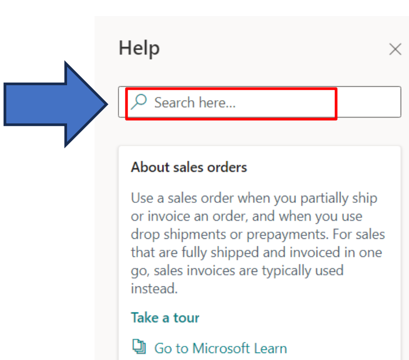
If you are experiencing trouble and the solution is not covered in this tutorial, please visit the help section on Microsoft Dynamics 365 Business Central.

To visit the help section:

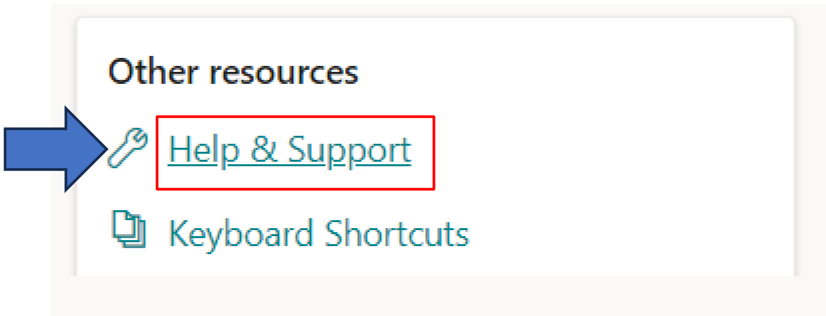
1. Click on the “?” in the upper right corner.



2. In the “Search here” box, search for the issue you need help with.



4. If you can't find your resolution there, try the "Help & Support" option on the bottom of "Help".



5. On the Help & Support page, try visiting the following links to get more help.

Find answers in Help:
https://docs.microsoft.com/en-US/dynamics365/business-central/

Read the blog:
https://go.microsoft.com/fwlink/?linkid=2076643

Visit the community forum:
https://community.dynamics.com/forums/thread/?groupid=e78817ab-a926-4d31-96cc-aef040a4eb04

See new capabilities being added:
https://go.microsoft.com/fwlink/?linkid=2047422

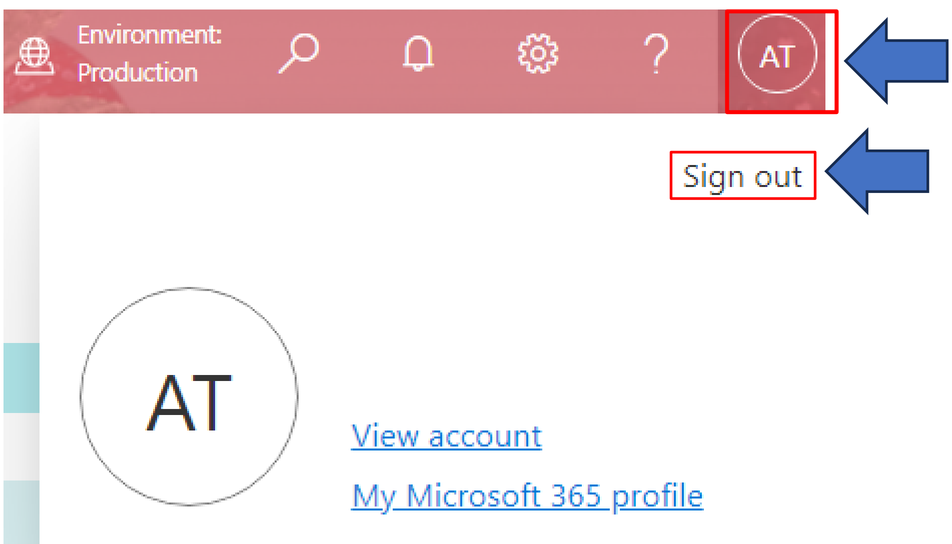
Tips and Tricks:
https://learn.microsoft.com/en-us/dynamics365/business-central/media/cheat_sheet.pdf

Frequently Asked Questions (FAQs):

Ever wonder if other beginning users have asked a specific question? Here are a few FAQs that new users of Microsoft Dynamics 365 Business Central have asked:

1. How do you sign out of your account?

To sign out, click on your “account initials”. Click on “Sign out”.



2. How do I know if my computer can use Microsoft Dynamics 365 Business Central?

To be able to use Business Central, all you need is a computer with access to the internet. Then, using a web browser you can connect to the system from anywhere by typing this into the address bar.

https://businesscentral.dynamics.com/

Additionally, you can Install the app for Business Central online: https://learn.microsoft.com/en-us/dynamics365/business-central/install-desktop-app#install-the-app-for-business-central-online

3. Which web browsers are best to use Microsoft Dynamics 365 Business Central with?

The best option is Microsoft Edge, because it was designed to work with it. Additionally, you can use Chrome for Windows and Firefox for windows. For Apple products, Business Central works with the current version of Safari on macOS.

4. Can I access Microsoft Dynamics 365 Business Central on my phone?

Yes, you can. To access Business Central, use a web browser on a smartphone and type this into the address bar.

https://businesscentral.dynamics.com/

5. Can multiple users use the same account?

No, because if you were to have someone sign in under the same login information then it may sign out the person currently working in Business Central. This can cause errors, mistakes, and confusion because that person can be in the middle of processing Sales Orders and lose track of their spot.

6. Do you know where I can find additional training information?

Yes, you can get free eLearning Content on the Microsoft training site. You can also ask your reselling partner for additional information. To visit the Microsoft training site, visit the link below:

https://learn.microsoft.com/en-us/training/dynamics365/business-central?WT.mc_id=dyn365bc_landingpage-docs

7. How do I find a specific page in Microsoft Dynamics 365 Business Central that I cannot find?

The best way to find a specific page is to use the help section described in this tutorial. Another tip is to try describing the page in the search bar. Say you are looking for the settings on shipping labels, try searching "Shipping Labels" and Business Central will display any information about it.

8. Does Microsoft Dynamics 365 Business Central have any other features that this tutorial did not cover?

Yes, there are several different features or roles in a company that people use in Business Central that we did not cover. Depending on the size of the company, they may have a whole team dedicated to just creating sales orders or creating shipping labels. Since this is a beginner guide to using Business Central, it was not appropriate to get into the Accounting aspects of the system.

9. What is a role in Microsoft Dynamics 365 Business Central?

A role is a specific position someone is in the company that Business Central specifically is designed for. The dashboard may look different for a person in Accounting than someone in Sales.

10. How do I practice using Microsoft Dynamics 365 Business Central on my own?

You can practice using Business Central by changing your "Environment" to "Sandbox". You can find the type of "Environment" in the upper right corner in Business Central. A "Production" Environment means that the data is live and currently in-use. A "Sandbox" Environment means that you are in a demo database and anything you do in here will not affect real data.

Credits

Special thank you to Microsoft Dynamics 365 Business Central for allowing anyone of all skill levels to be able to use the system. Massive thanks to the Microsoft community for helping with the creation of the tutorial. Thank you to Janice Redish and Dr. Kugelmann for teaching me the importance of creating a tutorial of this caliber. Another thanks to my colleagues who have helped peer review my tutorial in preparation for the final product. I want to thank anyone who can benefit from this tutorial in any way.