

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



Microsoft Dynamics 365  
**Business Central**

By Aaron Gould

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# Introduction

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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

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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

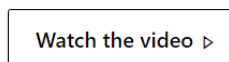
<https://businesscentral.dynamics.com/>

## Signing in:

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

Dynamics 365 Business Central

**Access your Dynamics  
365 Business Central  
account**



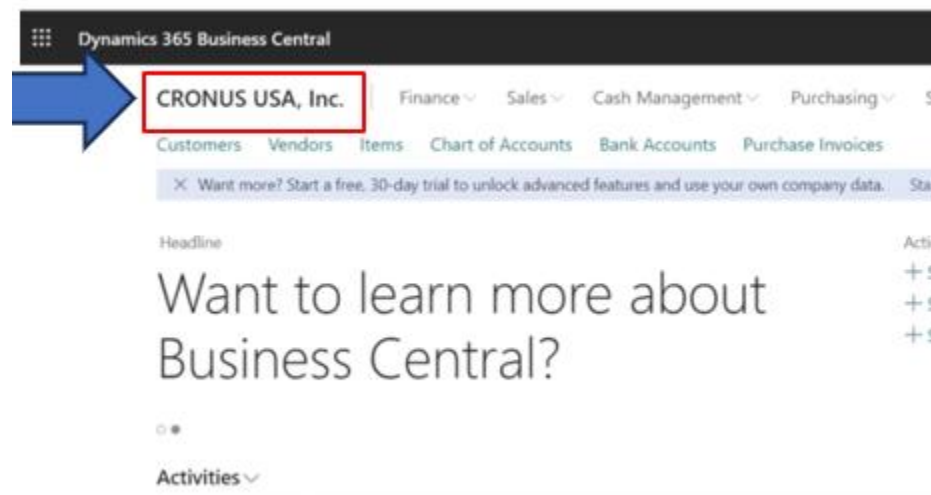
2. Enter your email and password provided and sign in.

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:

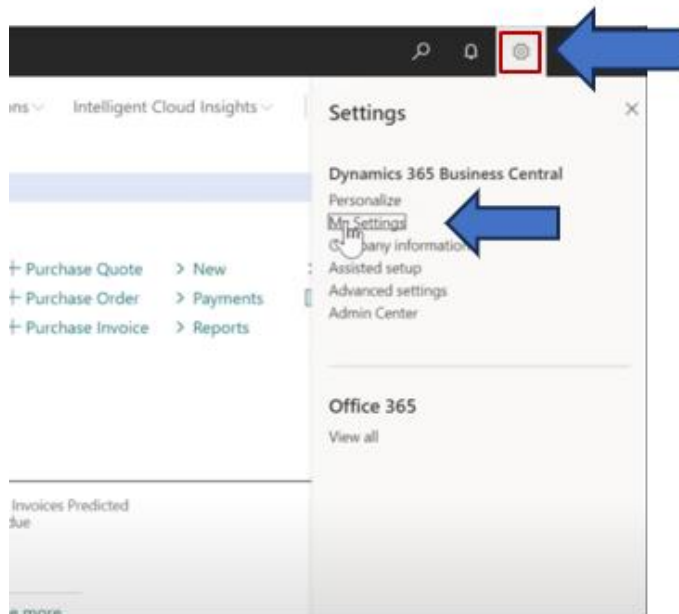
It is important to get familiar with the dashboard, so you know how to get around.

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!



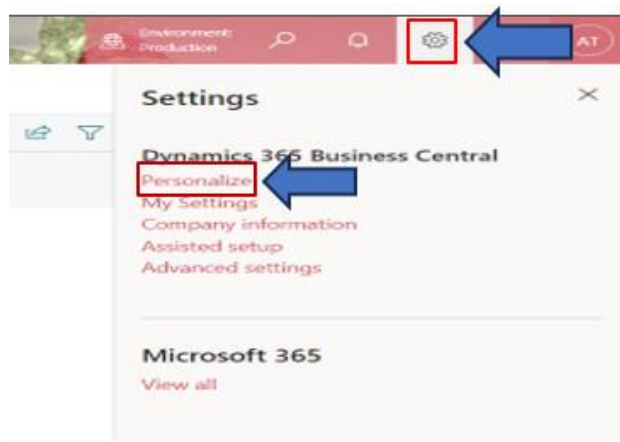
## Accessing User Settings:

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”.

The screenshot shows the 'Personalizing: Vendors' interface. At the top, there's a bar with 'Personalizing: Vendors', a '+ Field' button (highlighted with a blue arrow), 'Clear personalization...', a 'Done' button (highlighted with a blue arrow), and a 'Less' button. Below this is a navigation bar with 'STS-INKS USA', 'Finance', 'Journals', and 'Cash Management'. The main area shows a table of vendors with columns: No., Location Code, Cos... Code, Payment Terms Code, and Balance Due (\$). A context menu is open over the first vendor row, showing options: 'Set Freeze Pane', 'Move', 'Hide', 'Unlock editing', and 'Exclude from Quick Entry'. On the right, the 'Add Field to Page' panel is open, showing a list of recommended fields: 'Application Method', 'Base Calendar Code', 'Blocked', 'Contact', 'Coupled to Dataverse', 'Currency Code', and 'Fax No.'. A blue arrow points to this panel.

## Search:

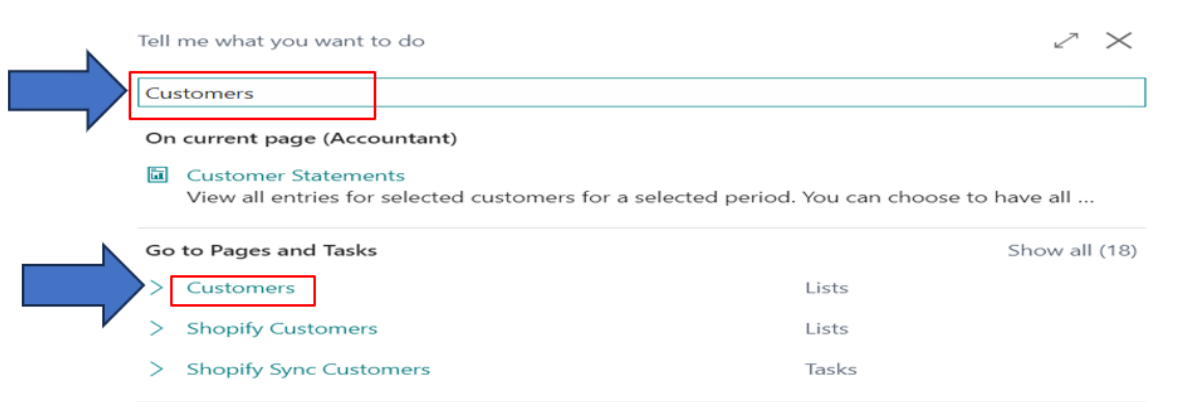
The search function is a strong tool to navigate around with. Follow these steps to learn how to use it:

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

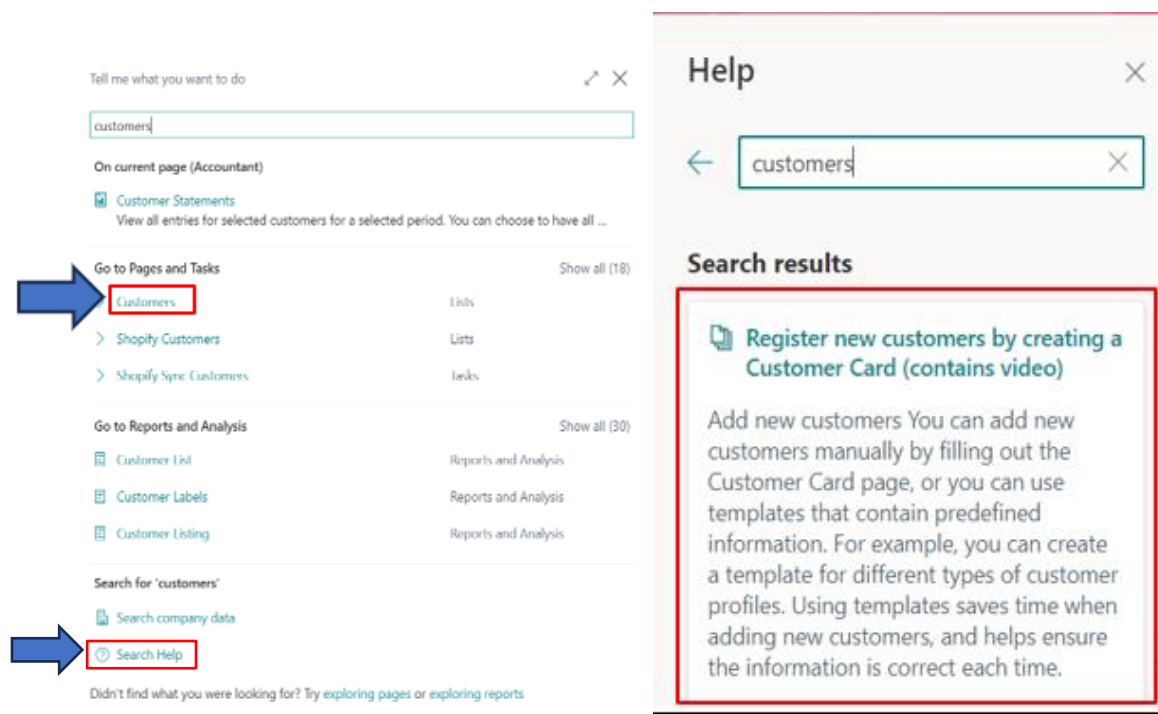




2. In the search bar, type “Customers” as an example.  
With search, you can navigate to any part of the system.



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.



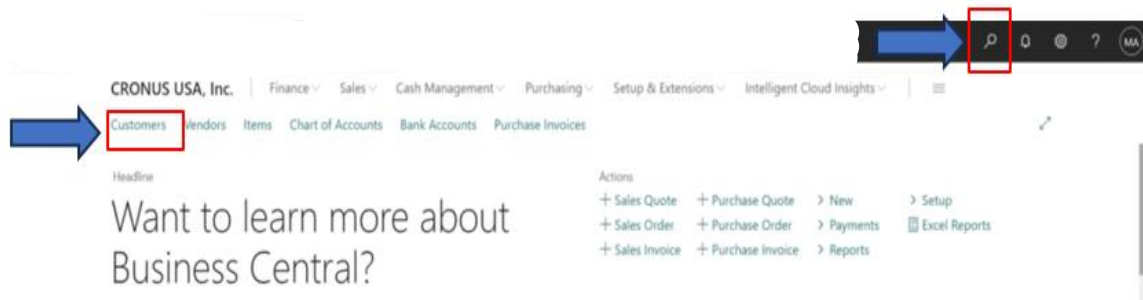
# Managing Customers

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:

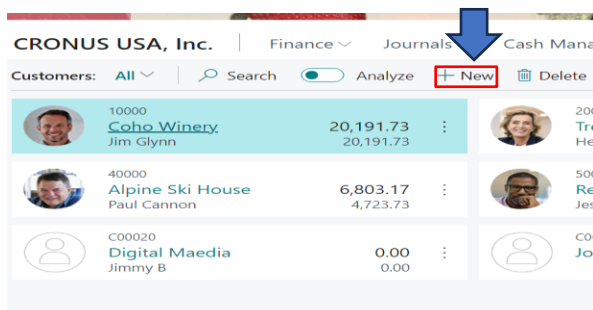
## Navigating to Customers:

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.

The screenshot shows the Dynamics 365 Business Central interface for a new Customer Card. The customer number is C00040. The form is divided into three main sections: General, Address & Contact, and Invoicing. The General section includes fields for No., Name, Balance, and Credit Limit. The Address & Contact section includes fields for Address, Phone No., and Contact Name. The Invoicing section includes fields for Tax Registration No., Tax ID No., and Tax Identification Type. Blue arrows point to the 'Show more' links for the General, Address & Contact, and Invoicing sections. A red box highlights the back arrow in the top left corner.

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

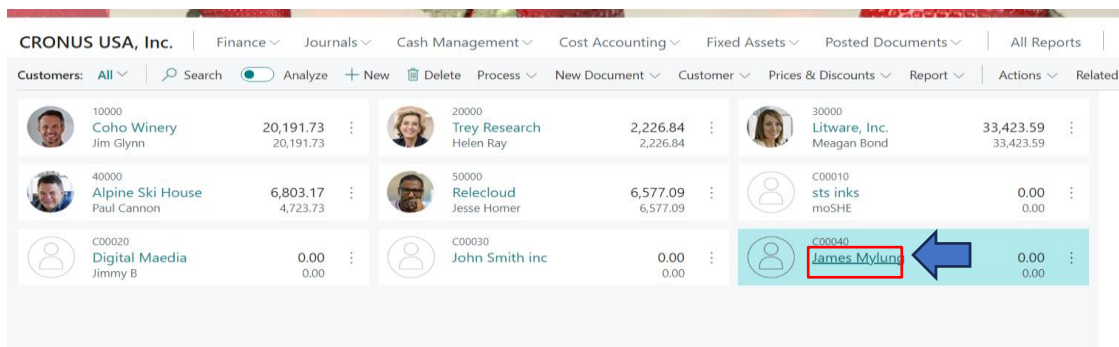
3. Now that you have entered the information for that Customer, navigate back to Customers by clicking the left arrow in the upper left corner.








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

## Editing Customers Information:

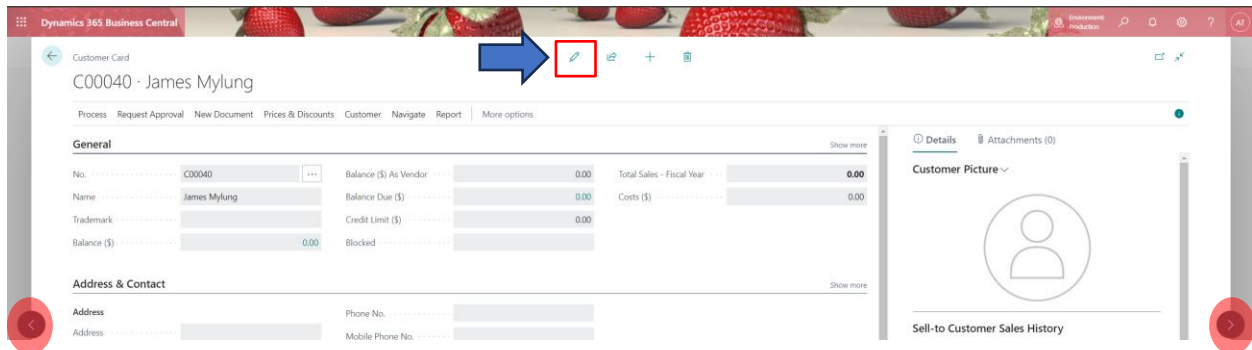
Now that you have learned how to add a customer, you can now edit that customer card. Since you only input the required information let's go back to that customer card and edit it.

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



CRONUS USA, Inc.			
Customers: All   Search   Analyze   + New   Delete   Process   New Document   Customer   Prices & Discounts   Report   Actions   Related			
 10000 <b>Coho Winery</b> Jim Glynn	20,191.73 20,191.73	 20000 <b>Trey Research</b> Helen Ray	2,226.84 2,226.84
 40000 <b>Alpine Ski House</b> Paul Cannon	6,803.17 4,723.73	 50000 <b>Relecloud</b> Jesse Homer	6,577.09 6,577.09
 C00020 <b>Digital Maedia</b> Jimmy B	0.00 0.00	 C00030 <b>John Smith inc</b>	0.00 0.00
 C00040 <b>James Mylung</b>	0.00 0.00		

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.



Customer Card  
C00040 - James Mylung

Process | Request Approval | New Document | Prices & Discounts | Customer | Navigate | Report | More options

**General**

No. C00040	Balance (\$) At Vendor 0.00	Total Sales - Fiscal Year 0.00
Name James Mylung	Balance Due (\$) 0.00	Costs (\$) 0.00
Trademark	Credit Limit (\$) 0.00	
Balance (\$) 0.00	Blocked	

**Address & Contact**

Address	Phone No.
Address	Mobile Phone No.

**Details** | Attachments (0)

Customer Picture

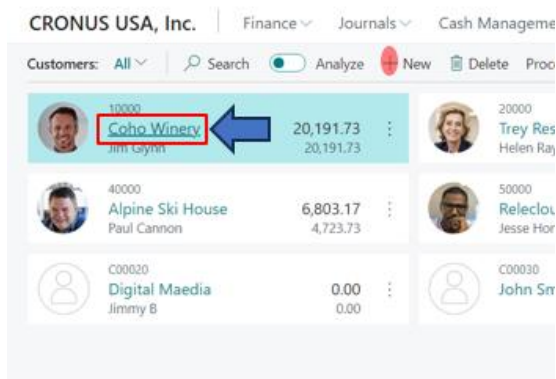
Sell-to Customer Sales History

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

## Viewing Customers Transactions:

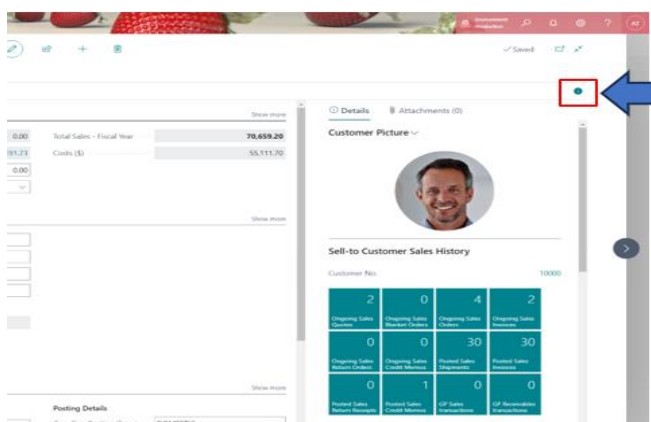
Business Central makes it simple to navigate around by including back arrows, quick links, and using search. You can navigate to the customers transactions by going to their customer card.

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.

Details

Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No. 10000

2 Ongoing Sales Quotes	0 Ongoing Sales Blanket Orders	4 Ongoing Sales Orders	2 Ongoing Sales Invoices
0 Ongoing Sales Return Orders	0 Ongoing Sales Credit Memos	30 Posted Sales Shipments	30 Posted Sales Invoices
0 Posted Sales Return Receipts	1 Posted Sales Credit Memos	0 GP Sales transactions	0 GP Receivables transactions

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

# Managing Vendors

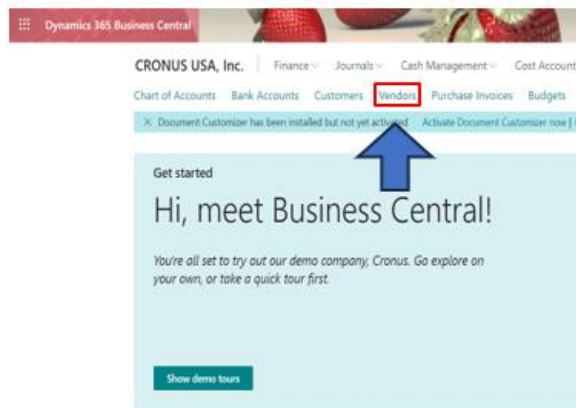
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Vendors are companies that you buy products and services from. Just like customers, you will learn how to navigate to, add, edit, and view vendors transactions.

To manage vendors, follow these steps:

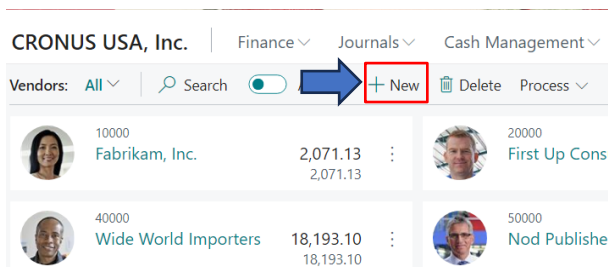
## Navigate to Vendors:

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.

The screenshot shows the Dynamics 365 Business Central interface for a Vendor Card. The card is titled "Vendor Card" and "V00010". It has tabs for "Process", "Request Approval", "New Document", "Vendor", "Prices & Discounts", "Report", "Actions", "Related", "Reports", "Automate", and "Fewer options". The "General" tab is active, showing fields for "No." (V00010), "Name", "Balance (\$)", "Balance (\$ As Customer)", "Balance Due (\$)", "Document Sending Pro...", "Search Name", "IC Partner Code", "Purchaser Code", "Responsibility Center", "Disable Search by Name", and "Company Size Code". The "Address & Contact" tab is also visible, showing fields for "Address", "Phone No.", and "Contact". A blue arrow points to the left side of the card, and a red box highlights the right side.

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.

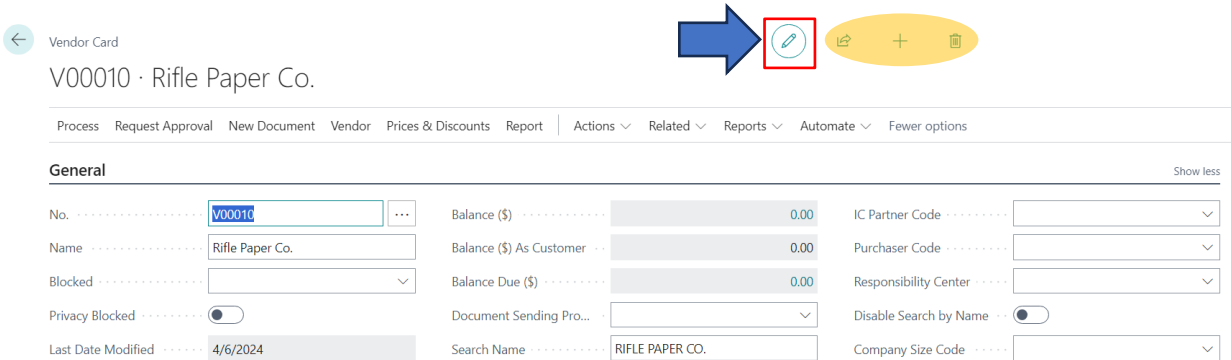
1. Navigate to the vendor card you added and click on their name to open the vendor card.

The screenshot shows the Dynamics 365 Business Central interface for the Vendors list. The list is titled "Vendors" and "All". It has tabs for "Search", "Analyze", "New", "Delete", "Process", "New Document", "Vendor", and "More options". The list contains several vendors, including "Fabrikam, Inc.", "First Up Consultants", "Graphic Design Institute", "Wide World Importers", "Nod Publishers", and "Rifle Paper Co.". A blue arrow points to the "Rifle Paper Co." vendor card, which is highlighted in light blue.

Vendor ID	Vendor Name	Balance (\$)
10000	Fabrikam, Inc.	2,071.13
20000	First Up Consultants	4,903.88
30000	Graphic Design Institute	10,289.74
40000	Wide World Importers	18,193.10
50000	Nod Publishers	17,273.87
V00010	Rifle Paper Co.	0.00



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.



The screenshot shows the 'Vendor Card' for 'V00010 · Rifle Paper Co.'. A blue arrow points to the pencil icon in the top right corner, which is highlighted with a red box. A yellow oval highlights the icons for share, add, and delete. The card displays various fields for the vendor's information, including No., Name, Blocked status, Privacy Blocked, Last Date Modified, Balance (\$), Balance (\$ As Customer), Balance Due (\$), Document Sending Process, Search Name, IC Partner Code, Purchaser Code, Responsibility Center, Disable Search by Name, and Company Size Code.

General		Show less	
No.	V00010	Balance (\$)	0.00
Name	Rifle Paper Co.	Balance (\$ As Customer)	0.00
Blocked		Balance Due (\$)	0.00
Privacy Blocked	<input type="checkbox"/>	Document Sending Process	
Last Date Modified	4/6/2024	Search Name	RIFLE PAPER CO.
IC Partner Code		Purchaser Code	
Responsibility Center		Disable Search by Name	<input type="checkbox"/>
Company Size Code			

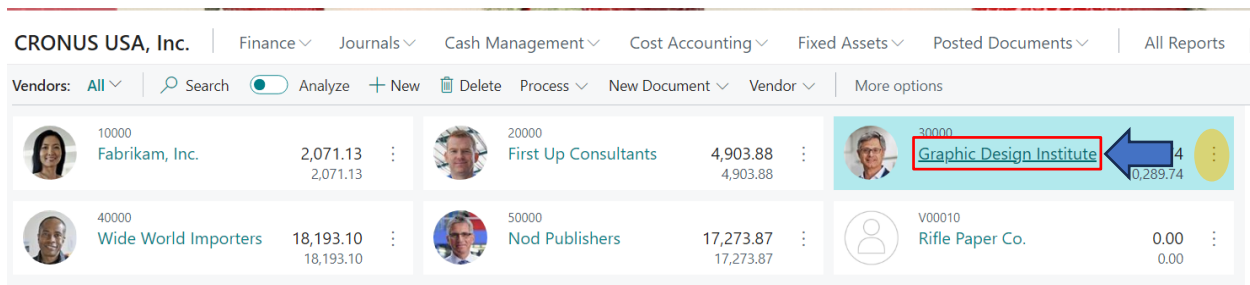
Hint: You can also delete, add, or share vendor cards with other users using the icons next to edit.

## 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.

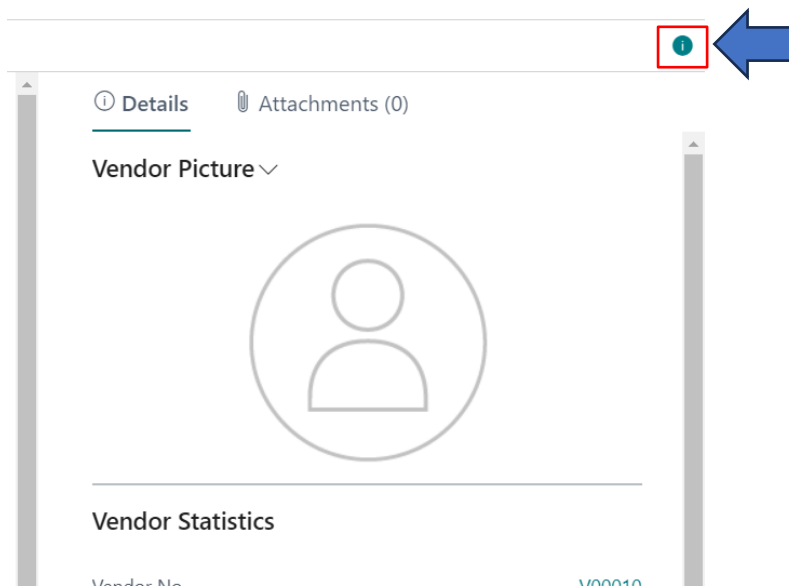


The screenshot shows the 'Vendors' list in Business Central. The table displays vendor information, including their ID, name, and balance. The vendor 'Graphic Design Institute' is highlighted with a red box and a blue arrow pointing to it. The vendor 'Rifle Paper Co.' is also visible in the list.

Vendor ID	Vendor Name	Balance (\$)
10000	Fabrikam, Inc.	2,071.13
20000	First Up Consultants	4,903.88
30000	Graphic Design Institute	0,289.74
40000	Wide World Importers	18,193.10
50000	Nod Publishers	17,273.87
V00010	Rifle Paper Co.	0.00

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.

#### Buy-from Vendor History

Vendor No. 30000

0	0	3	1
Quotes	Blanket Orders	Orders	Invoices
0	0	0	59
Return Orders	Credit Memos	Pstd. Return Shipments	Pstd. Receipts
59	0	0	0
Pstd. Invoices	Pstd. Credit Memos	Incoming Documents	GP Payables transactions
0			
GP Receivings transactions			

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

# Managing Items

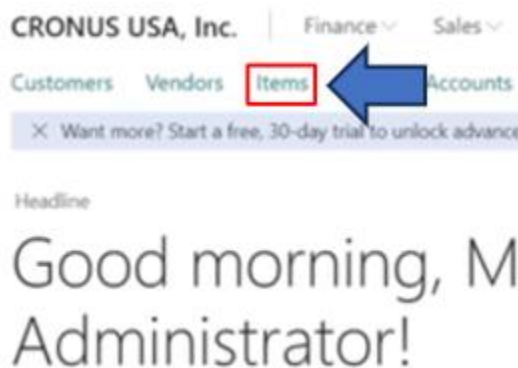
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Items are products or services that you buy, sell, or keep in inventory. In this section, you will learn how to navigate to, create, edit, and view item details.

To manage items, follow the steps below.

## Navigating to Items:

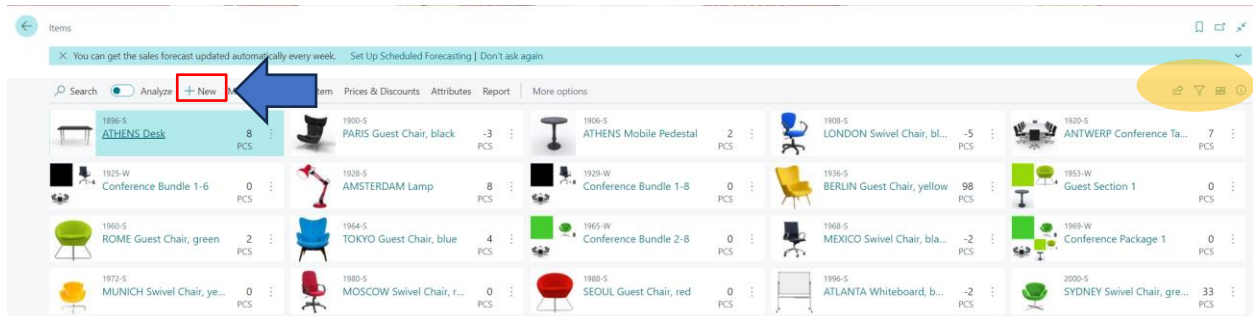
On the Business Central dashboard, click on "Items".



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.

The screenshot shows the 'Item Card' form. A blue arrow points to the 'Description' field. A yellow circle highlights the 'No.' field.

Item Card

1000

Process Request Approval Item Prices & Discounts More c

Item

No. 1000

Description \*

Blocked

Type Inventory

Inventory

Shelf No.

Quantity on Hand 0

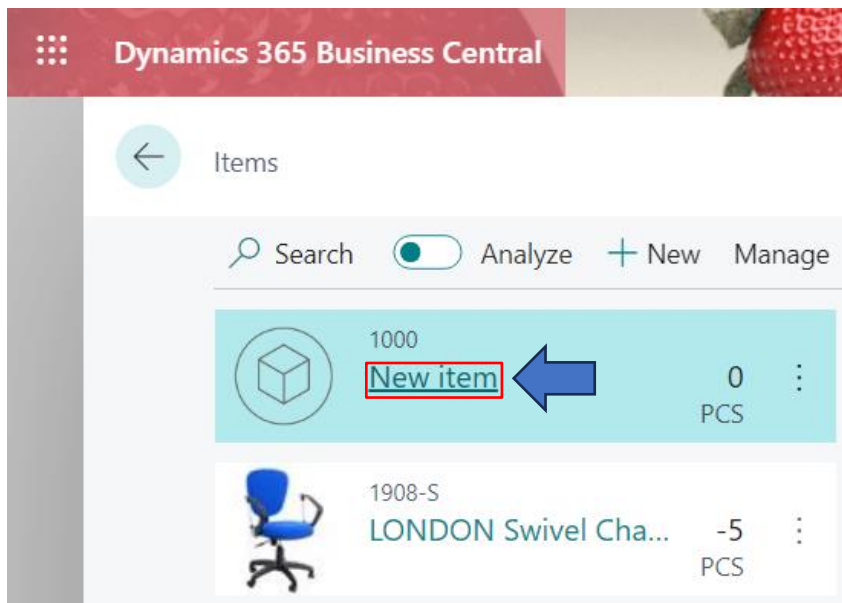
Qty. on Purch. Order 0

Costs & Pricing

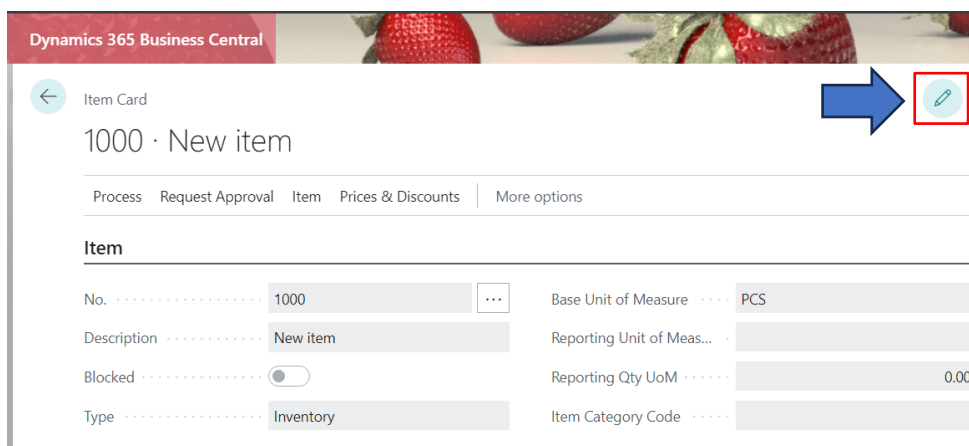
## Editing Item Information:

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”.

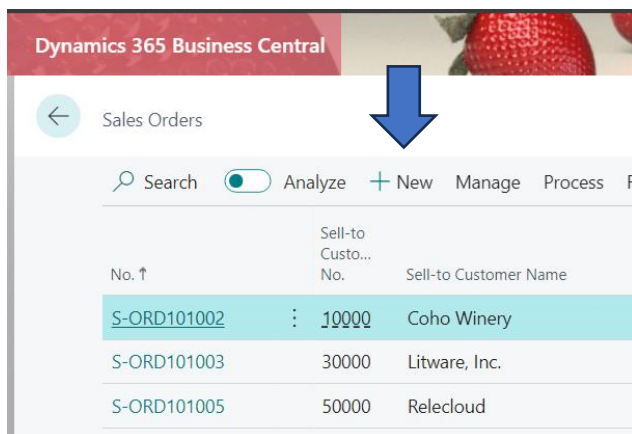
CRONUS USA, Inc. | Finance ▾ Cash Management  Sales ▾

Customers	Sales Quotes	Sales Invoices	Reminders
Items 	<span>Sales Orders</span>	Sales Credit Memos	Finance Charg
Item Charges	Blanket Sales Orders	Sales Return Orders	Posted Sales Ir

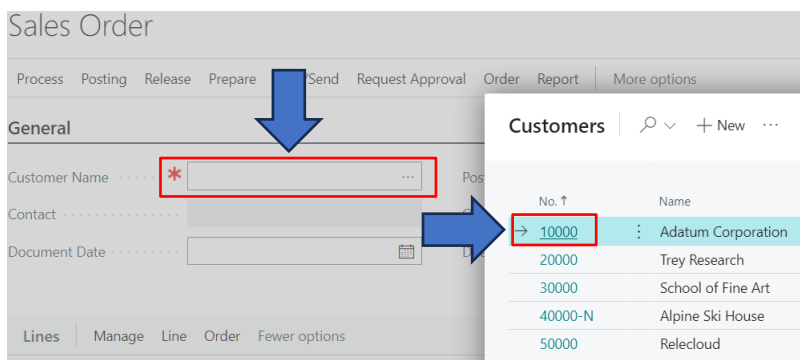
## Creating Sales Orders:

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.



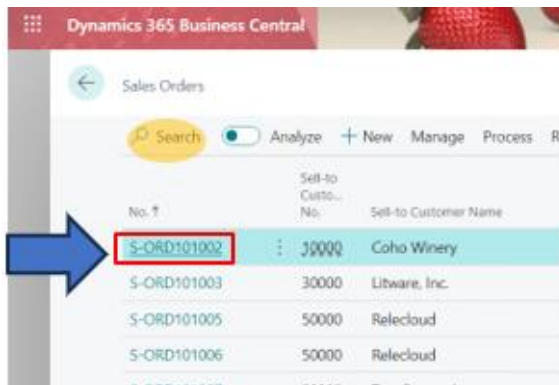
3. Click on the "Customer Name" box to show customers. Click on a "Customers number" to select them.



## Editing Sales Orders:

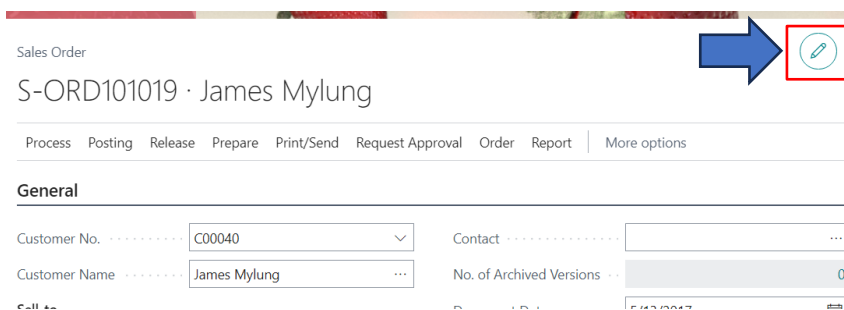
You will have to add customers, items, shipping details, and payment terms to Sales Orders.

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”.

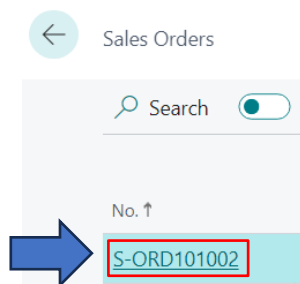
2. Click on the “edit” button at the top of the Sales Order.



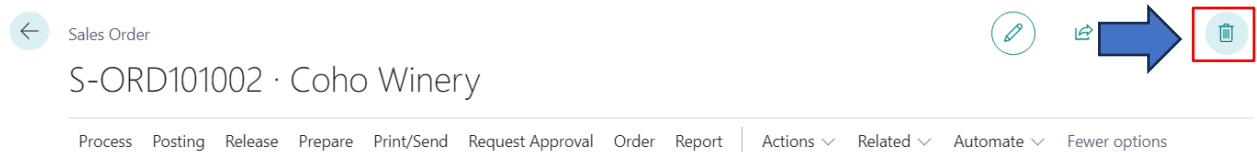


## Deleting Sales Orders:

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

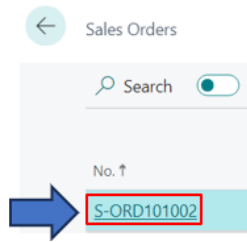


3. Click the "Delete" button to delete the sales order. Click “yes” to continue.

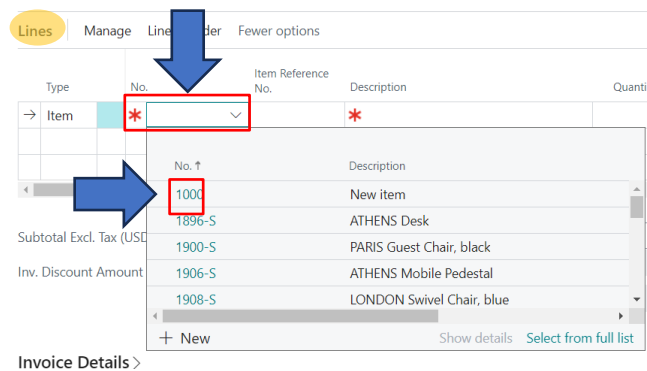


## Adding Items to Sales Orders:

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.

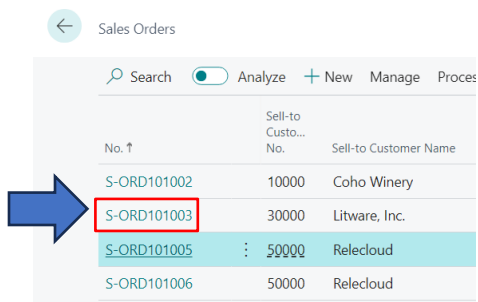
Type	No.	Item Reference No.	Description	Quantity	Unit of Meas... Code	Unit Price Excl. Tax	Location Code	Tax Area Code	Tax Group Code	Line Disc... %	Line Amount Excl. Tax
→ Item	1968-S		MEXICO Swivel Chair, black	10	PCS	190.10		ATLA...	FURNIT...		1,901.00
Item	1928-S		AMSTERDAM Lamp	7	PCS	54.90		ATLA...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

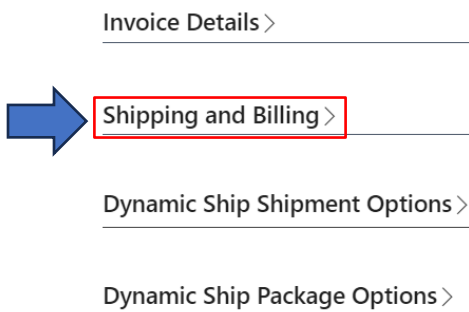
Before shipping a Sales Order, it is important to verify that the order is correct by checking the shipping and billing, items, and customers before creating a shipping label to ship the order.

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



No. ↑	Sell-to Custo... No.	Sell-to Customer Name
S-ORD101002	10000	Coho Winery
S-ORD101003	30000	Litware, Inc.
S-ORD101005	50000	Relecloud
S-ORD101006	50000	Relecloud

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



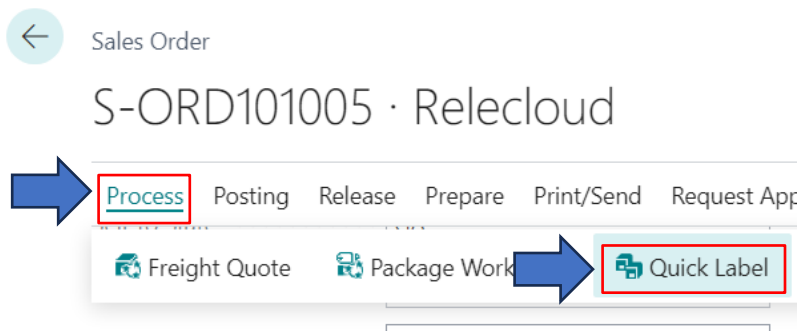
Invoice Details >
Shipping and Billing >
Dynamic Ship Shipment Options >
Dynamic Ship Package Options >

### 3. Verify the Shipping and Billing details are correct.

**Shipping and Billing**

Ship-to .....	Default (Sell-to Address) ▾	Bill-to .....	Default (Customer) ▾
Contact .....	Jesse Homer	Location Code .....	▾
<b>Shipment Method</b>		Shipment Date .....	4/2/2017
Code .....	1DA ▾	Shipping Advice .....	Partial ▾
Agent .....	UPS ▾	Outbound Whse. Handl...	
Customer Carrier Acco...	E95054 ▾	Shipping Time .....	
Agent Service .....	GROUND ▾	Late Order Shipping .....	Yes
Package Tracking No. ....			

### 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”.

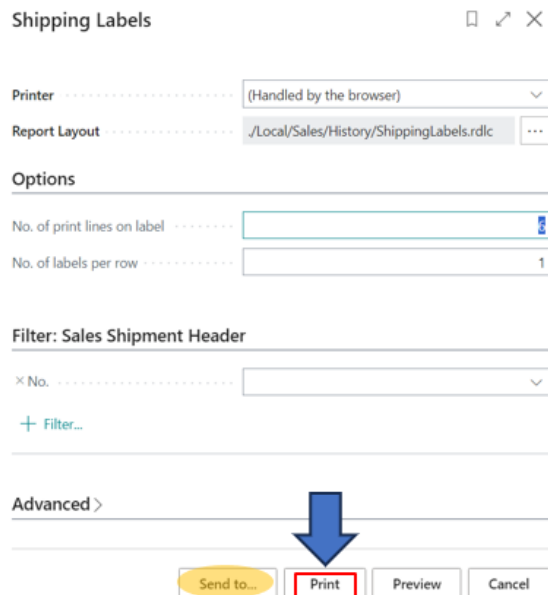
**Dynamic Ship Quick Label**

Shipment Method Code ▾	1DA ▾	Tracking No. ....	
Shipping Agent Code ▾	UPS ▾	Freight Cost .....	0.00
Shipping Agent Serv...	GROUND ▾	Freight Price .....	0.00

Manage Get Rate Get Label Shipment Options Package Options Get Weight ...

No. ↑	Tem... Code	Shipment Length	Shipment Width	Shipment Height	Shipment Dimensions Unit of Measure	Shipment Gross Weight	Weight Unit of Measure
LP0000001		15.00	25.00	10.00	INCH	25.00	LB

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



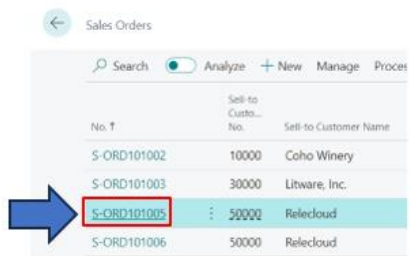
Hint: You can also select “Send to” to email or save the label.

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

## Posting a Sales Order:

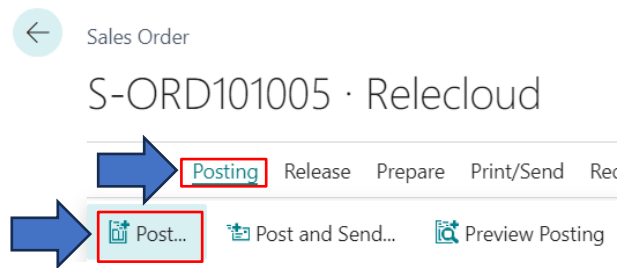
To post a Sales Order means to invoice the customer and finalize the transaction. Once posted, you cannot delete or edit the sales order.

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

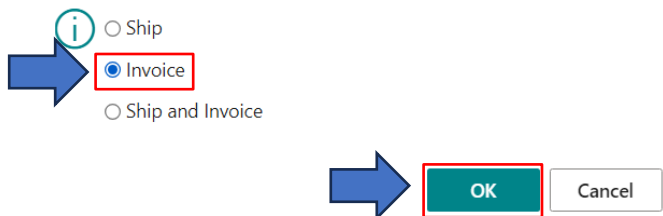


No. #	Sell-to Custo... No.	Sell-to Customer Name
S-ORD101002	10000	Coho Winery
S-ORD101003	30000	Litware, Inc.
S-ORD101005	50000	Relecloud
S-ORD101006	50000	Relecloud

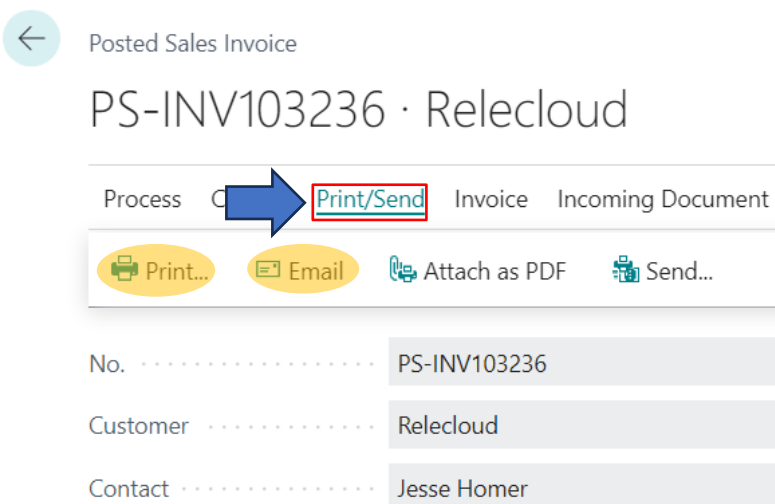
3. Click on “Posting”, then “Post” at the top of your screen.



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

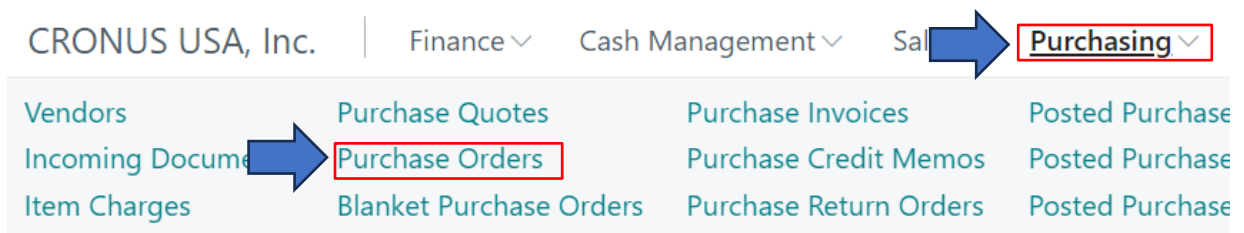
---

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.

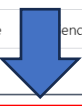
CRONUS USA, Inc. | Finance ▾ Cash Management ▾ Sales ▾ Purchasing ▾

Purchase Orders: All ▾ | 🔍 Search ☐  + New  Delete Process ▾ Release

No. ↑	Buy-from Vendor No.	Buy-from Vendor Name	Vendor Authorizati... No.	Location Code	Ass ID
-------	---------------------	----------------------	---------------------------	---------------	--------

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.


Purchase Order  
106020

Process Posting Release Prepare  Send Request Approval Order More options

**General**

Vendor No. ▼ Contact  

Vendor Name \*  

Buy-from 

No. ↑	Name	City	ZIP Code
10000	Fabrikam, Inc.	Atlanta	31772
20000	First Up Consultants	Chicago	61236
30000	Graphic Design Institute	Miami	37125
40000	Wide World Importers	Atlanta	31772
50000	Nod Publishers	Atlanta	31772

Address  

Address 2  

City  

Buy-from State  

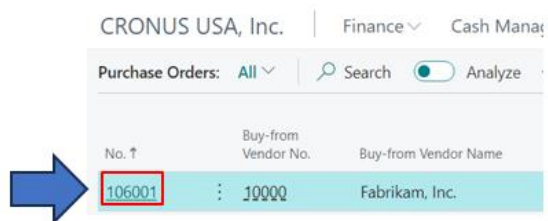
[+ New](#) [Show details](#) [Select from full list](#)

## Editing Purchase Orders:

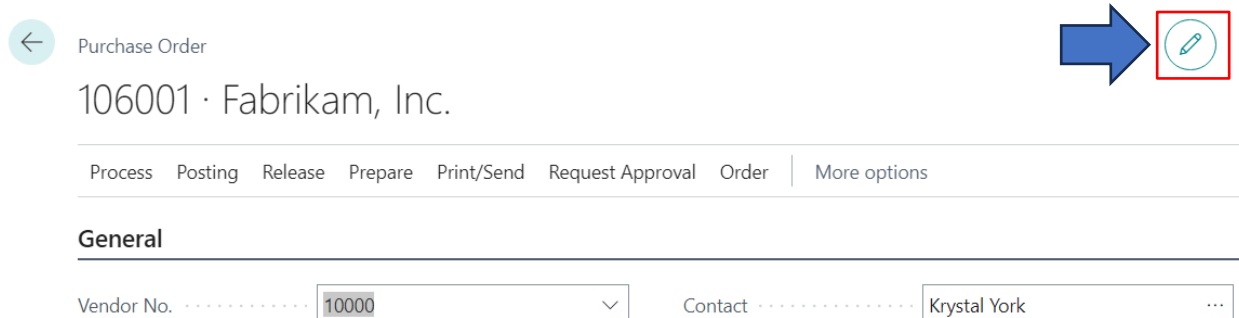
1. Navigate to “Purchase Orders”.



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



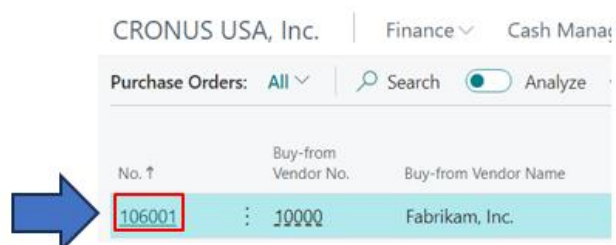
3. Click on the “edit” button at the top of the Purchase Order.



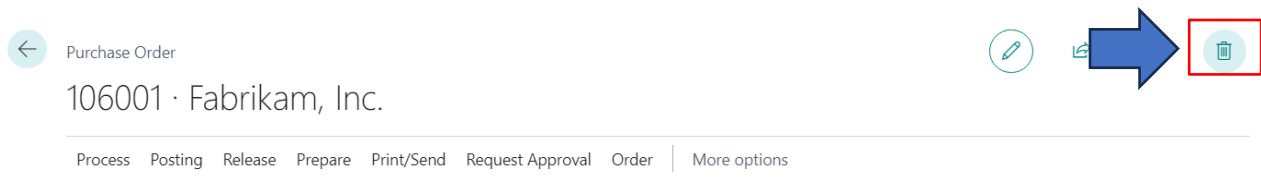
## Deleting Purchase Orders:

1. Navigate to “Purchase Orders”.

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



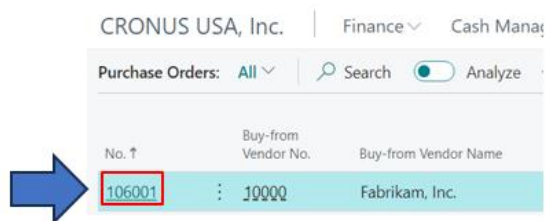
3. Click on the "Delete" button to delete the purchase order. Click "yes" to continue.



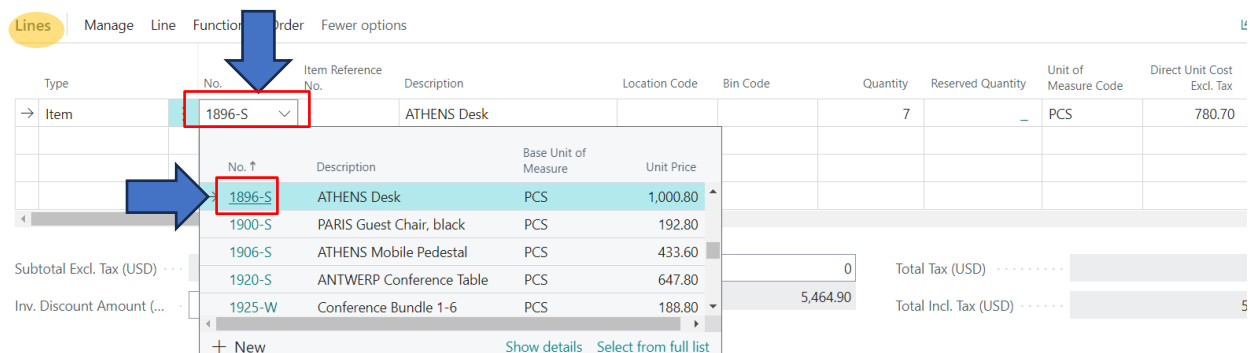
## Adding Items to Purchase Orders:

1. Navigate to "Purchase Orders".

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



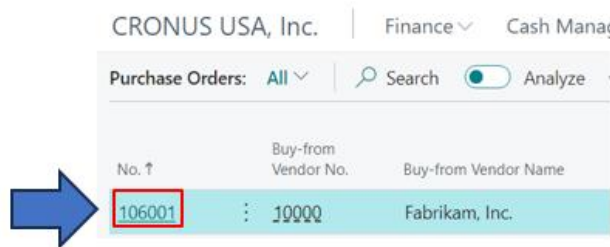
3. Scroll down to the "Lines" section. Click in the "empty box" under No. to add Items. Click on the "item no." to select.



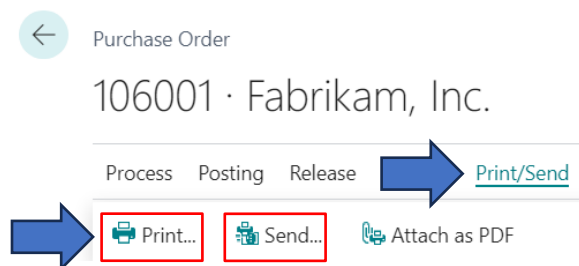
4. Once added, the default settings for that item will auto populate, edit the price and quantities as necessary.

## 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.

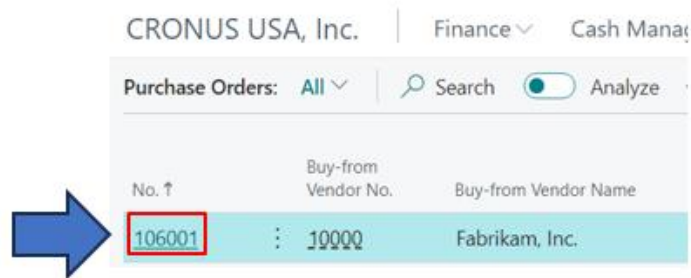


## Posting Purchase Orders:

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”.

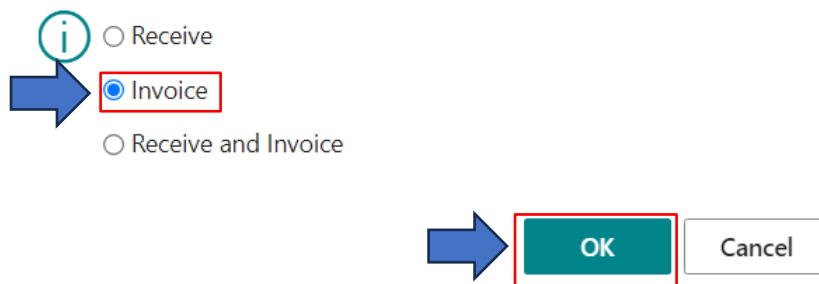
2. Click on the “Purchase Order No.” to open it.



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

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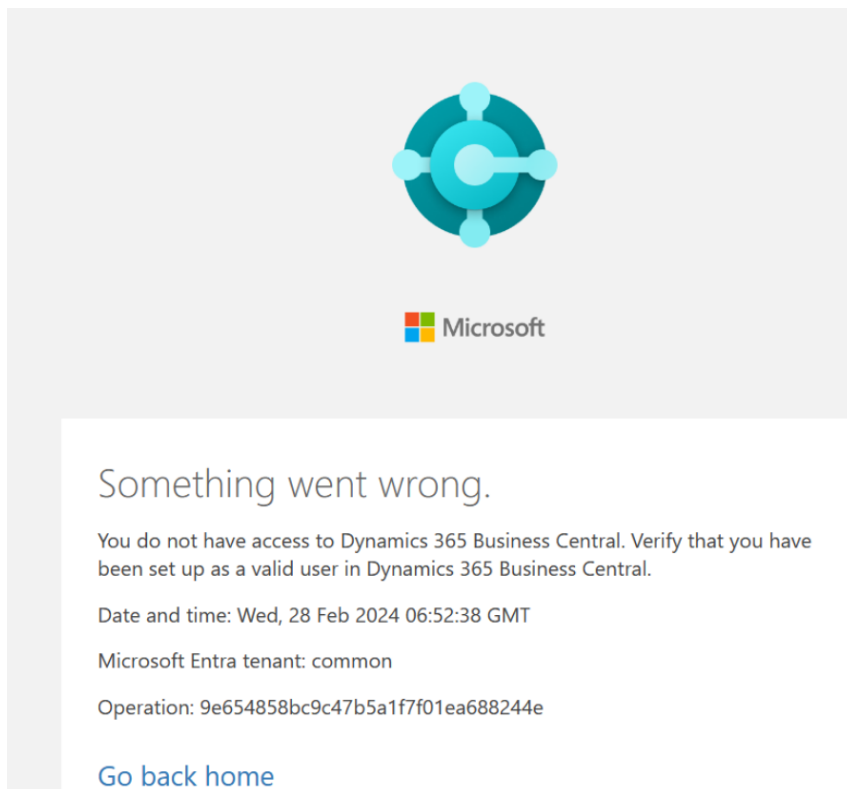
When working in Microsoft Dynamics 365 Business Central, you may come across problems. In this section, we will cover common issues, how to get help, and Frequently Asked Questions (FAQs).

To begin troubleshooting a problem, follow these steps.

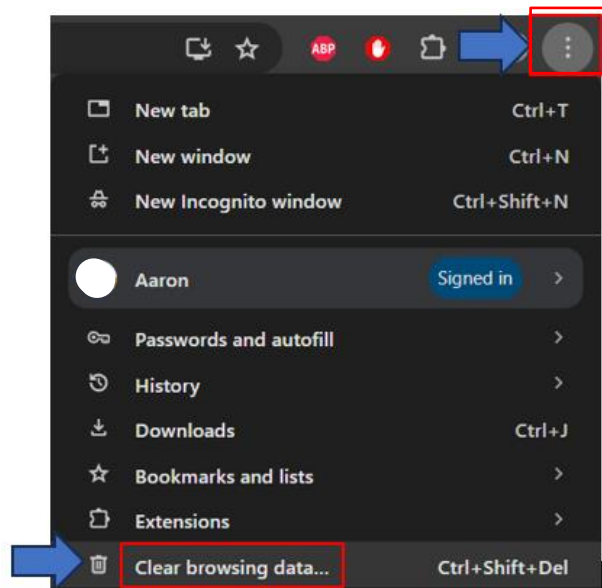
## Common Issues:

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

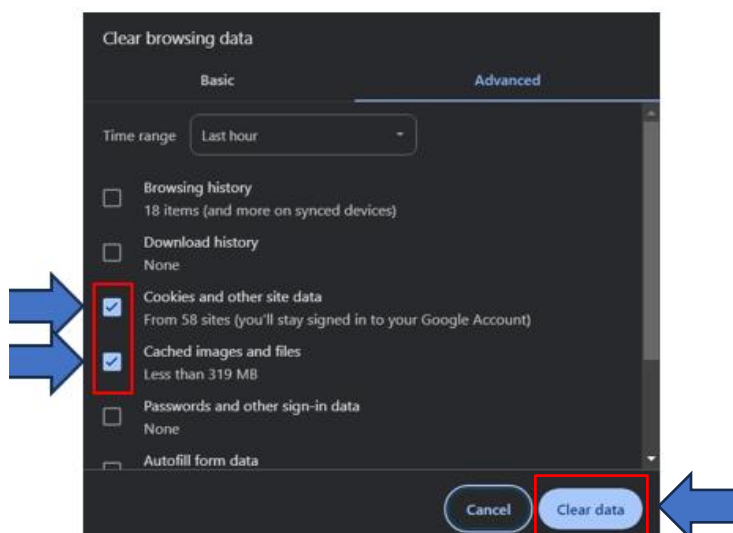
If you are having issues logging into Microsoft Dynamics 365 Business Central and get the error below, you may need to clear your cache. To clear your cache, follow these steps:



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

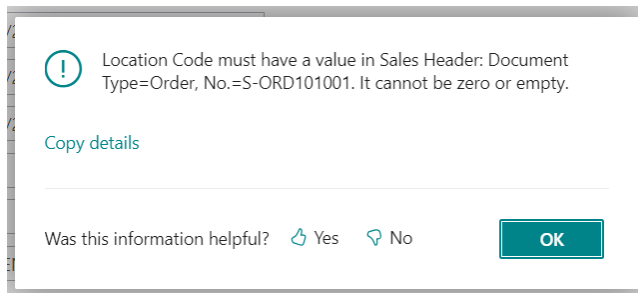


2. Click on the box for “Cookies and other side data” and “Cached images and files”. Click “Clear data”.



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:



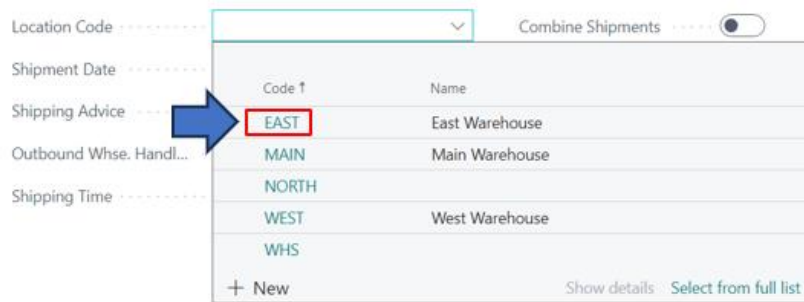
1. "Click OK".

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

Shipping and Billing	
Ship-to .....	Default (Sell-to Address) ▾
Contact .....	Robert Townes
<b>Shipment Method</b>	
Code .....	▾
Agent .....	FEDEX ▾
Agent Service .....	NEXT DAY ▾
Package Tracking No. ....	
Bill-to .....	Default (Customer) ▾
Location Code .....	▾
Shipment Date .....	11/14/2019
Shipping Advice .....	Partial ▾
Outbound Whse. Handl...	
Shipping Time .....	1D



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



Code	Name
EAST	East Warehouse
MAIN	Main Warehouse
NORTH	
WEST	West Warehouse
WHS	

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

### Getting Help:

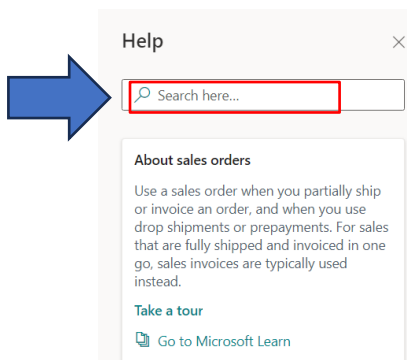
If you are experiencing trouble and the solution is not covered in this tutorial, please visit the help section on Microsoft Dynamics 365 Business Central.

To visit the help section:

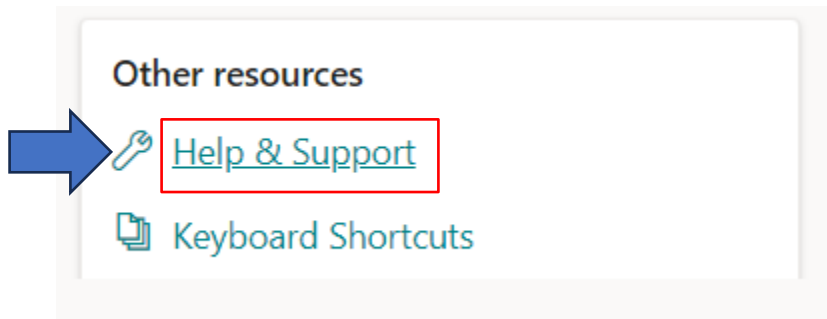
1. Click on the “?” in the upper right corner.



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:

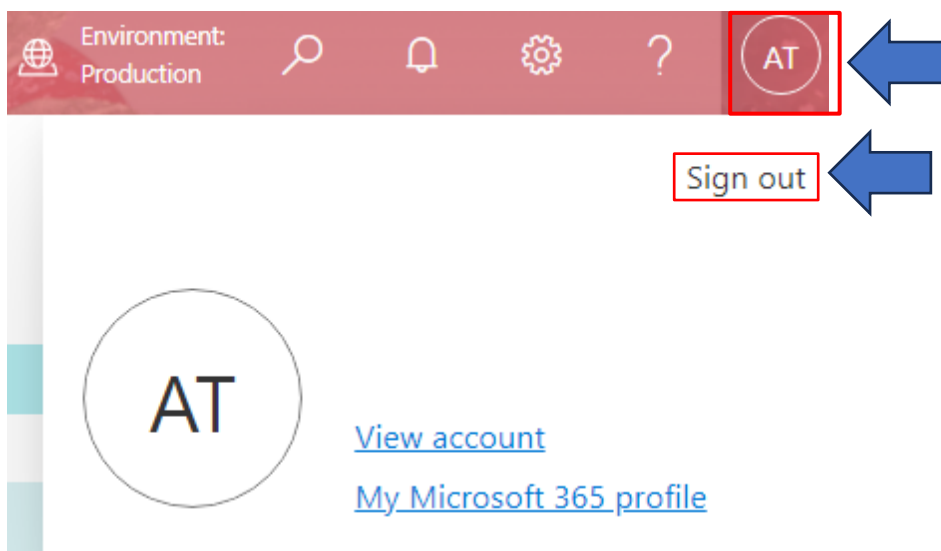
[https://learn.microsoft.com/en-us/dynamics365/business-central/media/cheat\\_sheet.pdf](https://learn.microsoft.com/en-us/dynamics365/business-central/media/cheat_sheet.pdf)

## 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](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

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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. Kugelman 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.