

Configuration Tables and Templates in Business Central (US Version)

Implementing Dynamics 365 Business Central requires setting up various **configuration tables** (global system settings) and using **configuration templates** (to standardize master data creation). Below we provide a comprehensive table-by-table guide. For each configuration table, we list its Business Central *formal name* and *table ID*, and detail key fields commonly configured – including their default values, recommended settings, and important considerations or choices. We then cover **master data templates** (for Customers, Vendors, Items, etc.), which help apply default field values when creating those records.

Company Information (Table 79)

This table stores basic company details used across the system (e.g. on reports and invoices). Fill in your organization's information here upon implementation.

Field	Default Value	Recommended Setting	Considerations
Company Name	(Blank)	<i>Your full legal company name</i>	The company's legal name as you want it to appear on documents. This is typically set during the company creation wizard.
Address (Address, City, State, ZIP Code)	(Blank)	<i>Your business address</i>	Enter the company's primary address. In the US, format is typically <i>Street, City, State ZIP</i> . Make sure this aligns with how you want it to print on forms.
Phone No. / Email	(Blank)	<i>Company phone and generic email</i>	Provide main contact phone number and a general contact email (e.g. info@yourcompany.com) for use on reports like invoices.
Country/Region Code	(Blank)	US (for United States)	Use the standard country code (e.g. "US"). This interacts with address formats and tax settings. If blank, local address format is used by default.
Tax Registration No.	(Blank)	<i>Your tax ID (EIN)</i>	In US, this can be your Employer Identification Number (EIN) if you want it on documents. (For VAT countries, this would be the VAT registration number). If not applicable, leave blank.
Fed. Tax ID (if available)	(Blank)	<i>Your Federal Tax ID</i>	Some US-localized versions have a field for Federal Tax ID. Enter it if required for 1099 reporting or leave blank otherwise.

Field	Default Value	Recommended Setting	Considerations
Company Website	(Blank)	<i>Your website URL</i>	Optional – if provided, can appear on outgoing documents.
Base Calendar Code	(Blank)	<i>e.g. STANDARD</i>	(Optional) Assign a base Calendar (working days/holidays). The calendar must be set up separately. Useful for date calculations like order promising. If left blank, no calendar is used.
Invoice Address Code	(Blank)	(Usually blank)	If the company's remit-to (payment) address is different, you can configure an alternate address code. Typically blank if using main address.
Logo (Picture)	(None)	Upload your logo image	The company logo can be uploaded here to appear on reports. Use a reasonably sized image.
Bank Accounts (Multiple fields)	N/A	N/A	Bank account info is managed in Bank Account table/cards rather than here. Instead, set up your bank accounts separately and link them to customer/vendor docs as needed.

Note: Most Company Information fields are one-time setups. Be sure to keep them updated if your company's address, contact info, or tax details change. Setting the **Country Code** influences address formatting. For example, if "Require Country/Region Code in Address" is enabled in General Ledger Setup, changing the country auto-formats the City/State/ZIP layout.

General Ledger Setup (Table 98)

The **General Ledger Setup** is a single-record table that defines fundamental financial and global settings for the company's ledger and other application areas. These settings impact how transactions post and how data is presented. Below are key fields commonly reviewed:

Field	Default Value	Recommended Setting	Considerations
Allow Posting From / Allow Posting To	01/01/20xx to 12/31/20xx (or blank)	<i>Set to your open fiscal period range</i>	Defines the date range in which users can post entries. Initially, this may be blank or set to the full fiscal year. It's recommended to update these dates to restrict posting to the current open period (e.g. from the start of the month/quarter to the end) and update as periods close. This helps prevent accidental back-dating or future-dating of entries. You can also set user-specific posting ranges in the User Setup table for more control.

Field	Default Value	Recommended Setting	Considerations
Register Time	Off (False)	<i>Off</i> (usually)	If enabled, the system records a timestamp on ledger entries when posting. Default is off. In the US, it's typically not needed to track exact times for G/L entries, so leaving this off is fine unless auditing requires it.
Allow Deferral Posting From/To	(Blank)	<i>Blank or limit if using Deferrals</i>	If using Deferral templates (to spread revenue/expenses), you can restrict the date range for deferral postings. Commonly left blank (no restriction) unless you need to prevent deferrals beyond a certain date.
Local Currency (LCY) Code	(Blank)	USD	Set your local currency code. For a US company this is "USD" (US Dollar). This is critical for multi-currency scenarios and for rounding precision settings. Once transactions exist, changing LCY is not recommended.
EMU Currency	Off (False)	<i>Off</i> (True only if in EMU region)*	Applicable mainly in EU countries using the Euro. In the US, leave this off.
Additional Reporting Currency	(Blank)	<i>If needed</i>	If you require financial reporting in another currency (e.g. parent company currency), specify it here. Typically left blank for US companies unless a secondary currency is required.
Amount Decimal Places	2:2	2:2 (for USD)	Controls how many decimal places amounts are shown with. The default "2:2" means always show 2 decimal places (e.g. \$1.00). In the US, currency has two decimals, so use 2:2. Only adjust if you need a different precision for LCY.
Unit-Amount Decimal Places	2:2	2:2 (or 2:5 for more)	Default is 2:2 (two decimals) for unit prices. You could use a range (e.g. 2:5) if item prices require more precision (up to 5 decimal places) – e.g. gasoline per gallon might need 3 decimals. Keep minimum 2 for currency.
Amount Rounding Precision	0.01	0.01	Smallest currency unit for rounding amounts. \$0.01 (one cent) is standard for USD. Do not change unless dealing with a currency that has a different minor unit.

Field	Default Value	Recommended Setting	Considerations
Invoice Rounding Precision (LCY)	1.00 (or 0.01)	0.01 or 1.00	Invoice Rounding is used to round invoice totals to a certain increment. Many U.S. companies don't use invoice-level rounding, so this can be set to \$0.01 (effectively no special rounding). If set to \$1.00 with rounding type = Nearest, the system would round total to the nearest dollar – not typical in the US. Generally leave at 0.01.
Invoice Rounding Type (LCY)	Nearest	Nearest	If invoice rounding precision is >0.01, defines rounding direction. "Nearest" is standard (round .5 up). In the US, since precision is usually \$0.01, this setting has little effect. If using \$1.00 precision (not common), Nearest will round .50 and above up. Other options are Up (always round up) or Down (always down).
Summarize G/L Entries	Off (False)	<i>Off</i> (or On per preference)	If On , the system will summarize G/L postings from a document into one line per account (reducing detail in G/L). Default is off to preserve line-by-line detail. Recommended to leave Off for detailed audit trails. Turn On only if you want condensed ledger entries (e.g. to reduce G/L entry count).
Mark Cr. Memos as Corrections	On (True)	On	If true, sales/purchase credit memos are marked as corrective documents, which causes them to post with opposite signs <i>and</i> link to original invoices. Default is on. Recommended to keep enabled – it facilitates netting credits with invoices in reports and is standard accounting treatment for negative invoices.
Allow G/L Acc. Deletion Before	(Blank)	<i>Set a cut-off date</i>	If blank, there's no restriction on deleting G/L accounts. It's wise to set this to a date far in the past (or the company's creation date) to block deletion of any G/L account that has entries on or before that date. For example, set 01/01/1900 or 01/01/2020 to effectively prevent deleting accounts that have been used. This helps maintain data integrity.

Field	Default Value	Recommended Setting	Considerations
Block Deletion of G/L Accounts	Off	On	When enabled, the system prevents deletion of any G/L account that has ever been posted to. It's strongly recommended to turn this On (True) in production, to avoid accidental loss of financial history.
Retained Earnings Account (fields for Balance Sheet/Income Statements)	(Blank)	<i>Set account schedule or financial report codes</i>	These fields (Acc. Sched. for Retained Earn., Fin. Rep. for Retained Earn.) let you specify which account schedule or financial statement defines retained earnings closing. These are often left blank in US, as retained earnings is usually handled via the year-end closing entry. If using account schedules to calculate retained earnings, set the code here. Otherwise, leave blank and manage via close process.
Global Dimension 1 Code / Global Dimension 2 Code	(Blank)	<i>e.g.</i> DEPARTMENT, PROJECT	Choose the two most-used Dimensions to be "Global," meaning they are available on every entry and can be filtered on most reports. Common choices in the US: Department, Project, Business Unit, etc. Decide early – changing later requires data transformation. These fields will populate dimension filters in many pages.
Shortcut Dimension 3-8 Codes	(Blank)	<i>Other frequent dimensions</i>	You can have up to 8 Shortcut Dimensions (including the 2 globals). Assign codes for dimensions 3-8 if you have more than two dimensions to track (they won't be global filters but are available on entries). If you only use two dimensions, leave others blank.

Field	Default Value	Recommended Setting	Considerations
VAT (Tax) Settings (various fields)	<i>(Defaults vary)</i>	<i>See below</i>	<p>Business Central uses “VAT” fields for tax logic. In the US, Sales Tax is managed differently (using Tax Areas and Tax Jurisdictions), but some VAT fields still play a role:</p> <ul style="list-style-type: none"> VAT Bus. Posting Group/Prod. Posting Group: In US, typically you set all customers and items to a generic group (e.g. TAXABLE/ NONTAX) or leave blank and use tax area codes instead. If using BC’s sales tax, ensure Tax Area Code and Tax Liable (on customer/vendor) are set appropriately; VAT groups might not be used. Unrealized VAT: Off by default. Not used for US sales tax. VAT Tolerance % / Max. VAT Difference: Not used in US; leave default. VAT Calculation Type (Bill-to/Sell-to VAT Calc.): Usually irrelevant in US; EU feature for cross-border VAT.
Local Address Format	<i>Country-specific</i> (e.g. City+State+ZIP)	City+State+ZIP Code	Defines how addresses are printed for domestic addresses. In US, the typical format is City, State ZIP. Choose an available format (City+State+ZIP) for consistency.
Require Country/Region Code in Address	Off (False)	Off (for US domestic focus)	When enabled, if a Country/Region Code is specified on an address, the City/State/ZIP will reformat based on that country’s format. In a US-only context, this can be off. If you do international business and want to ensure country is always included and formatted, you could enable it.
Local Currency Symbol/Description	(Blank)	\$ / US Dollar	Optional: Set how the local currency symbol and name appear on reports. E.g. “\$” and “US Dollar”. If blank, system may use currency code. Setting these makes reports clearer (e.g. showing \$ on invoices).
Bank Account Nos.	<i>(Varies)</i>	<i>Review default or set new</i>	This specifies the No. Series Code for numbering Bank Accounts . A default series (e.g. BANK) might be pre-filled via demonstration data. Ensure it exists and meets your format, or set up a new no. series code and assign it here.

Field	Default Value	Recommended Setting	Considerations
Bank Recon. with Auto Match	On (True)	<i>On</i> (if using Payment Rec. Journal)	If enabled, bank reconciliation is done via the Payment Reconciliation Journal (with auto-import/match of bank statements). If off, uses the manual Bank Rec. Worksheet. Most modern setups keep this On to leverage automated matching. Turn off only if your client prefers the legacy bank rec process (e.g. for check-heavy environments).
Enable Data Check	Off (False)	On (typically)	This setting, when On , validates data on documents/journals in real-time and shows messages in the Document/Journal Check FactBox . It helps catch issues before posting. It's often enabled in new BC versions. Recommend turning it On to aid users in catching errors (e.g. missing dimensions, overstated amounts, etc.).

Additional General Ledger Setup considerations: Other fields in GL Setup include **Notification** toggles for background posting (used if posting via Job Queue), various **Tolerance and Discount Posting** options (how to handle payment tolerances or discount grace periods), and **Report Output Type** (if using Job Queue posting+printing). These typically default to sensible values and can be left unless specific business scenarios require change. For example, **Payment Tolerance %/Max Amount** default to 0 (no tolerance), which is often fine; if the client allows minor payment differences to auto-write-off, set a small percentage or amount and choose whether to post to a tolerance account.

Sales & Receivables Setup (Table 311)

The **Sales & Receivables Setup** table governs how sales processes (quotes, orders, invoices, etc.) function. It includes defaults for sales documents, customer interactions, and numbering. Key fields to configure:

Field	Default Value	Recommended Setting	Considerations
Discount Posting	All Discounts (or No Discounts depending on localization)	All Discounts	<p>Controls how sales discounts are posted to G/L. Options:</p> <ul style="list-style-type: none"> No Discounts – discounts are <i>netted</i> into sales and not posted separately. Invoice Discounts – post invoice-level discount to its own account, but line discounts are netted. Line Discounts – post line-level discounts separately, invoice discount netted. All Discounts – post both invoice and line discounts to dedicated accounts. <p>Default is often All Discounts, ensuring both types post to their respective Sales Discount accounts. This is recommended so you can track total discounts given. Only use netting (No Discounts) if the client insists on reducing revenue directly instead of showing discounts. Note: If you use separate discount posting, be sure to specify accounts in General Posting Setup for <i>Sales Inv. Disc. Account</i> and <i>Sales Line Disc. Account</i>.</p>
Credit Warnings	No Warning (varies)	Both Warnings	<p>Determines whether the system warns about a customer's credit status when creating sales documents.</p> <p>Options:</p> <ul style="list-style-type: none"> No Warning – no pop-ups about credit. Credit Limit – warn if customer balance exceeds their Credit Limit. Overdue Balance – warn if the customer has any overdue invoices. Both Warnings – warn for either credit limit exceeded or any overdue balance. <p>Default may be <i>No Warning</i>, but Both Warnings is usually recommended to alert users of both situations. This helps salespeople catch risk: an overdue customer or one over their limit will trigger a message (but it doesn't block posting by default). Ensure you've set credit limits on customer cards for this to be meaningful.</p>

Field	Default Value	Recommended Setting	Considerations
Stockout Warning	On (True)	<i>On</i> (True)	If enabled, the user gets a warning when adding a sales line that would make the item's inventory go negative. Default is True. Recommended to keep On so users are aware of potential backorders/stock issues. (Note: If you allow negative inventory, this is just a warning; actual prevention of negative inventory is set in Inventory Setup .)
Shipment on Invoice	On (True)	<i>On</i> or per process	When On , posting a sales Invoice will automatically post the shipment as well. Default is often on, allowing "invoice&ship" in one step. Recommended to leave On for simplicity if the client's process is to invoice orders directly (common for non-warehouse scenarios). If they separate warehouse shipping from invoicing, set Off – this will require posting shipments first, then invoices.
Invoice Rounding	Off (False)	<i>Off</i> (usually)	Controls whether the system applies invoice-level rounding to the sales invoice total. Typically off in US, since pricing and sales tax already round each line and sum exactly. If turned on, ensure you set Inv. Rounding Precision (LCY) in GL Setup (e.g. \$0.01 or \$1.00) and have a Sales Rounding Account specified (in <i>Sales Posting Setup</i> or a specific G/L). Most US businesses keep this Off .
Ext. Doc. No. Mandatory	Off (False)	<i>Off</i> (for sales)	If enabled, the External Document No. (e.g. customer's PO number) is required on sales invoices and credit memos. In many US businesses this is optional – set to On only if the client wants to enforce capturing customer PO/reference numbers on every invoice. (On the Purchase side, this is often turned On to require vendor invoice numbers).

Field	Default Value	Recommended Setting	Considerations
Default Posting Date	Work Date	Work Date (usually)	<p>Sets the default Posting Date when creating new sales documents.</p> <p>Choices:</p> <ul style="list-style-type: none"> Work Date – use the user’s current Work Date (often today’s date, unless user has changed Work Date). No Date – leave blank so user must enter it. <p>By default, Business Central uses Work Date (i.e. today) to reduce data entry. Recommended to keep Work Date unless there’s a reason to force manual entry (e.g. always need specific backdating). Using Work Date helps ensure posting date = current date, but users should still adjust if needed for period-end postings.</p>
Default Quantity to Ship	Remaining (implied)	Remaining	<p>Sets the default for the Qty. to Ship on sales orders (and Return Qty. to Receive on return orders). If “Remaining,” the system auto-fills the full quantity not yet shipped when you create or refresh a shipment. If set to Blank, the field will stay zero and require manual entry for each line.</p> <p>Generally, Remaining is recommended so that when you post a shipment or invoice, all lines are picked up by default. Leave it blank only if users need to explicitly enter ship quantities (e.g. partial shipments by default).</p>

Field	Default Value	Recommended Setting	Considerations
Customer Nos. (and other No. Series fields)	(Preset series codes)	Review/Adjust series	<p>These fields link to the Number Series for various sales-related records. Out-of-the-box, they might be filled (e.g. Customer Nos = CUST series, Order Nos = SO series, etc., based on the Cronus demo or your configuration package). Verify each:</p> <ul style="list-style-type: none"> Customer Nos. – for new Customer IDs. Quote Nos., Order Nos., Invoice Nos. – for sales documents. Posted Invoice Nos., Posted Credit Memo Nos., Posted Shipment Nos. – for posted documents (historical entries). Credit Memo Nos., Blanket Order Nos., etc. – as applicable. <p>Recommended: Use meaningful codes (e.g. CUST for customers, SO for sales orders). Ensure each points to a valid No. Series with an appropriate starting format (e.g. CUST-10000, SO-0001). Update the series if the client has a specific numbering preference (like using year prefixes, etc.). Remember to also set up Return Order Nos. and Posted Return Receipt Nos. for return orders (not visible above but present in the table). If a field is blank, assign a series or create one.</p>
Calc. Inv. Discount	On (True)	<i>On</i> (True)	<p>If enabled, invoice discounts (based on the Customer's Invoice Disc. terms) are automatically calculated on sales documents. Typically True by default. Keep On if using invoice discount terms so the system auto-calculates the discount when the order total qualifies. If the client doesn't use invoice-level discounts at all, it can be off (no impact).</p>

Field	Default Value	Recommended Setting	Considerations
Application between Currencies	None	<i>None or All</i>	Controls whether you can apply customer payments to entries in different currencies. Options: <ul style="list-style-type: none">None – cannot apply across currencies (USD invoices can only be applied to USD payments).EMU – can apply Euro and legacy currencies (for EMU countries; not relevant in US).All – can apply any currency to any (the system will consider equivalent amounts). Default is None . For US companies, set to All only if you foresee scenarios of applying, say, a CAD payment to a USD invoice (rare). Typically keep at None to avoid unintentional cross-currency adjustments.
Copy Comments Blanket→Order / Order→Invoice / Order→Shipment	Off (False) for all	<i>As needed</i>	These toggles control if comments from one document type are automatically copied to the next in the chain. For example, if Copy Comments Order to Invoice = On, any comments on a Sales Order will carry over to the Sales Invoice. Default is off. Recommended to turn On for any stage where you want internal or external comments to flow through. Commonly, Order→Invoice is enabled so that any notes on the order (like special instructions) appear on the invoice. Blanket→Order and Order→Shipment are used if those document types are used heavily and notes are important.
Allow VAT Difference	Off (False)	Off (for US)	Allows manual adjustment of VAT amounts on sales documents. Not applicable to US sales tax – leave Off . (In VAT scenarios, turning this on lets users edit the VAT amount if rounding differences occur. For US sales tax, differences are handled via tax area setup, not manual changes.)

Field	Default Value	Recommended Setting	Considerations
Shipping Advice (on orders)	Complete (default on orders)	<i>Per order</i>	<i>Shipping Advice</i> isn't a field in S&R Setup, but a default on sales orders ("Partial" vs "Complete" shipment allowed). By default, new sales orders allow Partial shipments. You might advise setting the default to Partial (so you can ship whatever is available) unless the business requires all items to ship together (Complete). This setting is found on the Sales Order itself or in an Order Template rather than in S&R Setup. Partners often ensure the default is "Partial" for flexibility.
Archiving Settings – Archive Quotes, Archive Orders, Archive Return Orders	On (True) for Quotes; Off for others	<i>On where needed</i>	These settings control automatic archiving of sales documents when they are deleted or processed. For example, if Archive Orders = On, when a sales order is posted or deleted, a copy is saved in Archives. By default, BC may enable archive for Quotes (so you don't lose rejected quotes) and leave Orders off. It's recommended to turn On for Orders and Return Orders as well, to maintain an audit trail of changes and posted documents. There is minimal downside, aside from database size, which is usually negligible.
Default G/L Account Quantity	Off (False)	<i>On if desired</i>	(Added in 2024) When On , if you add a line of type G/L Account on a sales document, the Quantity will default to 1 instead of 0. This is useful for companies that often sell G/L-based charges or services – it saves a step of entering "1" manually for each line. Turn On if users will benefit from a default quantity of 1 on G/L lines; otherwise leave Off (especially if you prefer to enter specific quantities, or often use G/L lines for misc. where quantity isn't needed).

Field	Default Value	Recommended Setting	Considerations
Document Default Line Type	Item (typically)	<i>Item</i> (or as needed)	Sets the default Type on the first line of new sales documents. Options include Item , G/L Account , Resource , Fixed Asset , Charge (Item) , or Blank . In BC 2021+ this is an enum. By default it might be Item (since most sales involve items). You should set this to whatever the client most frequently sells: <ul style="list-style-type: none">Service-oriented business with no inventory: choose G/L Account or Resource to default lines to services.Asset sales: Fixed Asset if selling assets often (rare).For inventory-based companies: Item (the usual choice). If unsure, leave as Item – users can still change line type manually. This just saves clicks by defaulting the drop-down on new lines.
Create Item from Description	Off (False)	<i>Off</i> (usually)	If enabled and a user enters a Description on a sales line without specifying an item, the system will prompt to create a new Item card from that description. Default is off. Recommend Off to avoid accidentally creating many one-off items. Enable only if the business process is to allow quick item creation on the fly by typing a new item name in orders (uncommon).
Create Item from Item No.	Off (False)	<i>Off</i> (usually)	Similar to above: if enabled, typing a new (unrecognized) item number on a sales line will prompt to create a new item with that number. Default off. Typically leave Off to maintain control via item cards. Turn on only if users will create new item master records directly during order entry.
Copy Customer Name to Entries	On (True)	On	If on, when posting, the customer's name is copied to the G/L and customer ledger entries. Default is True. Keep On so historical entries retain the customer name (even if the customer record's name changes later). This aids in auditing.

Field	Default Value	Recommended Setting	Considerations
Disable Search by Name	Off (False)	<i>Off</i> (usually)	If enabled, you can change the Customer Name on sales documents without updating the actual Customer Card (it treats it as a one-time override). Default off, meaning any name change on a sales order updates the customer card's name. Usually leave Off so that users don't inadvertently rename customers via orders. If a user needs a different "Ship-to Name," they should use the Ship-to Address functionality rather than editing the Bill-to Name.
Allow Multiple Posting Groups	Off (False)	<i>Off</i> (typically)	Controls whether a single customer can use multiple customer posting groups on different documents. Default off, meaning the posting group comes from the customer card and cannot be changed per document. In almost all cases, leave this Off – changing a customer's posting group on individual orders can cause inconsistent G/L postings. Only consider enabling if the client has a rare scenario of the same customer sometimes taxed vs non-taxed or similar, and they want to handle via different posting groups (even then, there are usually better ways, like multiple customer records or tax area codes).
Check Multiple Posting Groups	Blank (an Enum default)	<i>N/A unless above on</i>	This setting is relevant only if "Allow Multiple Posting Groups" is On. It determines the rule for choosing which posting group to use (e.g. last used, or always ask). If you keep multiple posting groups disallowed (as recommended), this does not apply.
S. Invoice Template Name (and other Journal Template fields)	<i>(Blank or default "SALES")</i>	<i>Review if using background posting</i>	These fields specify which General Journal Template/Batch to use when posting via background job queue for certain processes (sales invoices, credit memos, etc.). Typically, default templates like "SALES" are used. If using the Job Queue to schedule postings, ensure these templates exist. Otherwise, defaults are fine and these can remain unchanged.

Field	Default Value	Recommended Setting	Considerations
Copy Line Descr. to G/L Entry	On (True)	On	If True, the line Description from sales documents (for G/L Account type lines) will carry through to the G/L entries. Default is True. Keep On so that your G/L entries show the same description as the sales line (useful for identifying what a miscellaneous charge was for, etc.). Only disable if the client wants cleaner G/L entries without line-level detail descriptions.
Tax Area Code / Tax Liable (not in S&R Setup, but on Customer Card)	N/A	Set per Customer	Note: Sales tax in the US is primarily configured via Tax Area Code on the customer and Tax Group Code on items, not directly in S&R Setup. Ensure that for customers, Tax Liable is checked (if they should be charged sales tax) and a default Tax Area Code is assigned for their jurisdiction. These are typically set up in Customer templates (discussed later) rather than S&R Setup.

Additional S&R Setup fields: There are many more fields (e.g. **“Shipping Agent Services”**, **“Reason Codes”** defaults, etc.) not listed above if they are seldom changed. One important one for US companies might be **“Copy Inv. No. to Pmt. Ref.”** – which is on the Purchases & Payables side to copy vendor invoice numbers to payment references. On sales side, typically no equivalent field. Also, if using **Return Orders**, note fields like **“Return Receipt on Credit Memo”** (if posting a sales credit memo should auto-create a posted return receipt) and **“Exact Cost Reversing Mandatory”** (forces selection of the exact item ledger entry when processing returns). These defaults are generally *Off*; consider enabling **Exact Cost Reversing Mandatory** = On to enforce accurate cost attribution on returns (helpful for costing precision).

Purchases & Payables Setup (Table 312)

The **Purchases & Payables Setup** is analogous to S&R Setup but for purchasing processes (purchase orders, invoices, vendors, etc.). Many settings mirror those in sales. Key fields to configure:

Field	Default Value	Recommended Setting	Considerations
Discount Posting	All Discounts (or No Discounts)	All Discounts	Like sales, controls separate posting of purchase discounts. Options are analogous (No Discounts, Invoice, Line, All). Default is often All Discounts so that purchase line and invoice discounts post to their own contra-expense accounts. Recommended to keep All Discounts for transparency (you'll need to specify Purchase Line Disc. Account and Purchase Inv. Disc. Account in General Posting Setup). If set to No Discounts, any vendor discounts simply reduce the expense or inventory cost directly.
Receipt on Invoice	On (True)	On or per process	If On , posting a Purchase Invoice will auto-post the item Receipt as well ¹ . Default is on (allowing one-step receipt+invoice). This suits companies that record vendor invoices directly without separate receiving. If the business has a warehouse process where goods are marked received first (e.g. via warehouse or receiving dept) and invoices are entered later, set Off to enforce separate receiving. For small companies or service purchases, On is convenient.
Invoice Rounding	Off (False)	Off (usually)	Whether to apply invoice total rounding on purchases. Typically off in US. Vendors' invoices are expected to add up line items exactly (including any sales tax rounding on their end). Keep Off unless you have a scenario with frequent half-cent differences and want to automatically post rounding adjustments. If turned on, ensure a Purch. Rounding Account is set in posting setups.
Ext. Doc. No. Mandatory	Off (False)	On (True)	If enabled, the External Document No. (usually the vendor's invoice number) is required on purchase invoices/credit memos ¹ . Best practice: On for Purchases – to ensure you capture vendor invoice numbers (helps avoid duplicate bill entry). In the US, this is commonly turned on so accounting can't post a vendor invoice without filling the vendor's bill number.

Field	Default Value	Recommended Setting	Considerations
Default Posting Date	Work Date	<i>Work Date</i>	Same concept as in Sales. For purchase orders/invoices, default the Posting Date to today's date (Work Date) ² . "No Date" option would force manual entry. Generally, keep as Work Date to speed data entry; users can adjust if posting in a different period.
Default Qty. to Receive	Remaining	Remaining	Similar to "Default Qty. to Ship" but for receipts ³ . When posting a Purchase Order receipt, if Remaining , it auto-fills the outstanding quantity. If Blank , user must input qty. Recommended Remaining so that by default all remaining items are received, reducing manual entry. Use Blank only if partial receipts are the norm and you want explicit entry each time.
Vendor Nos. (and other No. Series)	<i>(Preset codes)</i>	<i>Review series</i>	Verify the numbering series for vendors and purchase documents ⁴ : <ul style="list-style-type: none">Vendor Nos. – e.g. VEND series.Quote Nos., Order Nos., Invoice Nos. – e.g. P-QUO, PO, PINV series.Posted Invoice Nos., Posted Credit Memo Nos., Posted Receipt Nos. – for posted purchase documents (often default to prefixes like PINV-, PCR- etc.).Credit Memo Nos., Blanket Order Nos. – as needed.Return Order Nos., Posted Return Shpt. Nos. – for purchase returns ⁵ ⁶ . Ensure each is assigned to a valid No. Series. Adjust formats if needed (e.g. some companies prefer "PO0001" style). If the client has specific numbering conventions (like per year or per location), configure accordingly.
Calc. Inv. Discount	On (True)	<i>On (True)</i>	If enabled, the system calculates invoice discounts on purchase documents based on Vendor's invoice discount terms ⁷ . Default true. Keep On if you've set up vendor invoice discount terms so BC will auto-calc the discount when criteria are met. If not using vendor invoice discounts, it can remain on harmlessly, or off.

Field	Default Value	Recommended Setting	Considerations
Appln. between Currencies	None	<i>None</i> (usually)	Similar to sales, governs applying vendor ledger entries across currencies. Typically leave None – you normally wouldn't apply a USD vendor credit to a CAD vendor invoice, for example. "All" would allow such cross-currency applications, but that's rare and can complicate realized gain/loss calculations.
Copy Comments Blanket→Order, Order→Invoice, Order→Receipt	Off (False)	<i>On as needed</i>	Same idea as sales: whether comments on purchase blanket orders copy to orders, and orders to receipts or invoices ⁸ . Usually off by default. If the client uses Blanket Purchase Orders , consider enabling Copy Comments Blanket to Order so any notes (like special pricing agreements) flow into actual POs. Order to Invoice and Order to Receipt can be turned on if internal comments on POs should be visible to the AP team when receiving or invoicing. Evaluate case-by-case.
Allow VAT Difference	Off	Off (for US)	Allows manual adjustment of VAT on purchase documents. Not used for US sales tax (tax calculation differences are handled via tax area rounding). Leave Off to disallow arbitrarily changing tax amounts – ensures the system-calculated sales tax is used consistently.
Calc. Inv. Disc. per VAT ID	Off (False)	<i>Off</i> (for US)	If on, invoice discounts are calculated separately for each VAT Identifier (used in EU where different VAT rates might require prorating discounts). Not applicable in US, leave Off (all lines can be discounted together without issue).
Posted Prepayment Nos. (Invoice & Cr. Memo)	<i>(Preset, e.g. PPINV)</i>	<i>Verify series</i>	If the company will use Prepayments (prepayment invoices to vendors or from customers), ensure the Posted Prepayment Invoice and Credit Memo No. Series are defined. Often defaulted (e.g. PR-INV). If prepayments are not used, these won't come into play, but it's good to have them configured in case.

Field	Default Value	Recommended Setting	Considerations
Check Prepayment when Posting	On (True)	On	When enabled, you cannot post a purchase order that has a prepayment % set until the prepayment invoice is paid or dealt with. Default true, meaning system will enforce that any required prepayment is paid before the final invoice can be posted. Keep On to ensure prepayment workflows are respected (prevents posting a final invoice if the prepayment hasn't been consumed or paid).
Prepayment Auto Update Frequency	On Inv. (Maybe default)	<i>On Inv.</i>	Determines how often the system auto-updates the Prepayment amount status on orders. Choices might include "Never", "Daily", "On Inv.", etc. By default, it may update when invoicing. The impact is minor – using On Inv. (on invoice posting) is fine for most. If prepayments are common and you want the order's prepayment status updated regularly, you could set a frequency (requires job queue). Otherwise, leave as default.
Post with Job Queue / Post & Print with Job Queue	Off / Off	<i>Off</i> (or On if using)	These toggles, similar to Sales, allow posting purchase documents via background processing (e.g. large batches) ⁹ . By default off. If the client wants to use background posting (perhaps to not lock UI for large runs), you can enable and ensure the Job Queue is set up. For most, leave off – users post interactively.
Allow Document Deletion Before	(Blank)	<i>Set a date</i>	Similar to sales: specify a date; any posted purchase invoices/credit memos <i>on or after</i> that date cannot be deleted ¹⁰ . This is a control to prevent removal of recent posted documents. Many organizations set this to a current date so that old posted documents (prior to that date) cannot be accidentally removed (in BC, normally you wouldn't delete posted invoices at all unless as part of a voiding process). In the US, audit practices typically discourage deleting any posted invoices. Consider setting a date far in the past or simply ensure user permissions prevent deletion.

Field	Default Value	Recommended Setting	Considerations
Report Output Type	PDF (or Printer)	<i>PDF</i> (default)	Specifies the output format when using Post & Print with Job Queue ¹¹ . Usually PDF (to save to the report inbox). Leave as default unless the client prefers a different default output.
Document Default Line Type	Item (likely)	<i>Item</i> or per need	For purchase lines, default Type on new lines ¹² . Options: G/L Account, Item, Fixed Asset, Charge (Item), etc. Default is often Item (assuming most POs are for inventory items). If the company mostly purchases services or expenses, you might switch default to G/L Account . Otherwise, keep Item so when users create a PO line, it expects an item. This is analogous to sales Document Default Line Type.
Default G/L Account Quantity	Off	<i>On</i> if desired	Same toggle as in S&R but for purchase: if On , entering a G/L Account line on a purchase document will default Quantity = 1. Default false. If users frequently record service charges via G/L lines (like utilities, fees) and want the amount to default to 1 quantity, turn it On (makes the Line Amount equal Unit Price automatically). If most G/L purchases don't use quantity (they just enter an amount), leaving it off is fine.
Archive Quotes/ Orders	On for quotes, Off for orders	<i>On for both</i>	Controls auto-archiving of purchase quotes and orders when they're processed or deleted ¹³ (same concept as sales). It's wise to enable Archive Orders = True so that a history of POs is kept (for changes or deletion). Purchase Quotes archiving is often on by default – keep it on to retain quotes after use.

Field	Default Value	Recommended Setting	Considerations
Ignore Updated Addresses	Off	Off	If Off (default), if a user changes a vendor address on a purchase order, it updates the Vendor Card with that new address. If On , changes on the document are <i>not</i> fed back to the vendor master ¹⁴ . Generally leave Off – usually you want a changed address to persist (or better, update the vendor card manually and use the updated record on orders). If users sometimes tweak an address just for one order (e.g. drop-ship address), it's better handled via Ship-to/Bill-to fields, not by editing the vendor address, so this setting should not need to be On.
Create Item from Item No.	Off	Off	Similar feature on purchase side: if enabled, typing an unknown Item No. on a purchase line prompts to create a new item ¹⁵ . Default off. Recommend keep Off to control item creation centrally. Purchase agents typically shouldn't create new items on the fly without proper setup.
Copy Vendor Name to Entries	On	On	When posting, copy the vendor's name to ledger entries ¹⁵ . Default true; keep On for the same reasons as customer name – helps identify entries historically, even if vendor name changes.
Copy Inv. No. to Pmt. Ref.	Off	On	If On , when you post a purchase invoice, the vendor's invoice number (External Doc. No.) is copied into the Vendor Ledger Entry as the Payment Reference . This is <i>highly recommended</i> : turn On so that when you later prepare payments, the remittance can include the vendor's invoice number. It saves having to manually fill the "Applies-to Doc. No." on payments. Many partners enable this for easier check/EFT remittance info.
Disable Search by Name	Off	Off	Similar to sales: if on, changing a vendor name on a document won't update the card. Usually Off. Typically, users don't change vendor names on the fly; they maintain the Vendor card. Leave Off to avoid discrepancies.

Field	Default Value	Recommended Setting	Considerations
Allow Multiple Posting Groups	Off	<i>Off</i>	Same logic as customer: normally a vendor has one Vendor Posting Group (which drives payables account and possibly tax). Default off, meaning you can't change posting group per document. Leave Off to maintain consistency – a given vendor's purchases should generally always go to the same payables and tax accounts.
Check Multiple Posting Groups	(Unused)	N/A	Only applies if above is on – which we recommend against. So ignore.
P. Invoice Template Name (and related template fields)	(Default template names or blank)	<i>Review</i>	Similar to S&R: designate which Journal Template/Batch to use if posting purchase invoices via a batch (Job Queue). Typically pre-set to e.g. "PURCH" template. You likely won't change these unless you have a custom posting process. Ensure those templates exist; otherwise leave as is.
Copy Line Descr. to G/L Entry	On	On	If On , for G/L Account type purchase lines, copy the line Description to the resulting G/L entry ¹⁶ . Default true; keep On so that expense entries in the G/L carry the details from the purchase line (e.g. "Office Supplies for Sept"). Only consider Off if descriptions are overly long and not needed in G/L – but generally they're useful.
Debit/Credit Acc. for Non-Item Lines	Blank	<i>Set if using WMS</i>	These fields apply to advanced warehouse handling of non-inventory lines ¹⁷ . If the client uses Warehouse Management (Require Receive/Pick) and sometimes has G/L or Charge lines on orders, you might set default interim accounts here. In most cases (without directed warehouse), leave blank. If using advanced warehouse and notice issues posting miscellaneous lines, consult documentation for proper setup of these accounts (usually some interim accrual accounts).

Field	Default Value	Recommended Setting	Considerations
Auto Post Non-Invt. via Whse.	Allow (or similar)	<i>Allow</i>	An option controlling how non-inventory lines post when using warehouse documents ¹⁸ . Likely choices: Allow, Block, or Auto. Default likely "Auto" or "Allow". For most, leave default. Only relevant in combination with Require Receive/Pick.
Return Order Nos. / Posted Return Shpt. Nos.	<i>(Preset codes)</i>	<i>Verify series</i>	Number series for Purchase Return Orders and Posted Return Shipments (when you send goods back to vendors) ⁵ ¹⁹ . Ensure these are set (e.g. PRETURN, PRSHPT). If the client will process returns, these need to be in place. Cronus often has them predefined.
Copy Cmts Ret. Ord. to Ret. Shpt./ Cr. Memo	Off	<i>On if needed</i>	If enabled, comments on a Purchase Return Order copy to the Posted Return Shipment or the Purchase Credit Memo created from it ⁵ ²⁰ . Off by default. If return orders are used and you want notes (e.g. reason for return) to flow through, set these to On .
Return Shipment on Credit Memo	Off	<i>Off</i>	If On , when you post a Purchase Credit Memo, the system will automatically post a Return Shipment for any item quantities (meaning you didn't do a separate Return Order) ¹⁹ . Default off. Best practice is to use Return Orders for returning items. Leave this off to avoid accidental inventory adjustments when posting purchase credits. Only use if the client wants a shortcut to handle returns directly via credit memos.
Exact Cost Reversing Mandatory	Off	On (recommended)	Same as the sales side, but for purchase returns: if enabled, you must select the exact original receipt entry (Appl.-from Item Entry) when posting returns/credit memos for items ¹⁹ . Turning this On ensures cost flow is precise (particularly with Average/FIFO costing, it prevents cost anomalies by linking to the original cost). Recommended On if the client will process returns – it enforces best practice of applying returns to original receipts.

Field	Default Value	Recommended Setting	Considerations
Price Calculation Method	Lowest Price	Lowest Price (default)	Relates to the new pricing experience. This is an enum that might allow Lowest Price (standard behavior) vs other methods (e.g. "Closest Price" if a third-party or future extension is used). By default, Business Central uses Lowest Price – meaning if multiple applicable prices/discounts exist for a vendor (or customer), it picks the most favorable (lowest cost). Keep as Lowest Price unless instructed to change by an ISV solution.
Price List Nos.	<i>(Preset, e.g. VPRICELIST)</i>	<i>Verify</i>	Number series for the new Purchase Price List feature (if enabled) ²¹ . Ensure a series exists for price list IDs if using the new pricing system. If not using price lists, this is not critical.
Allow Editing Active Price	Off (False)	<i>Off</i> (or On if needed)	If using the new pricing mechanism, this controls whether users can edit an Active price list line (as opposed to creating a new price revision). Default off (meaning once a price is active/effective, you shouldn't edit it). In early adoption, leave Off to enforce proper price list management (edits should make new lines). Only set On if the client wants to override active prices directly (not recommended due to losing history).
Default Price List Code	(Blank)	<i>Set if using price lists</i>	If price lists are used, this can specify a default price list to use for new price entries from worksheets ²² . For purchases, perhaps a default list for vendor prices. If using price lists for vendors, set a code here. Otherwise leave blank.

Field	Default Value	Recommended Setting	Considerations
Link Doc. Date to Posting Date	Off (False)	On (True)	When On , if you change the Posting Date on a purchase document, the Document Date will automatically update to match ²³ . This is useful to keep invoice document date (used for due date calculation) in line with posting date. We recommend On so that if a user postpones the posting date, the document date follows (ensuring correct aging calculation). If off, posting date and document date are independent – which could be useful if you receive an invoice late (doc date = vendor invoice date, posting date = when you actually post). Decide based on the client's preference for calculating payment terms (usually they use vendor's invoice date for due date). Often turning it on avoids confusion.
Check Doc. Total Amounts	Off (False)	On (True)	When enabled, the system will compare the "Doc. Amount Incl. VAT" that you enter in the purchase invoice header to the sum of the lines, and warn if they differ ²⁴ . This is essentially a control to verify that the total of lines including tax matches the total on the vendor's invoice. In the US, this is very useful for AP to ensure they entered freight or misc. charges correctly to tie to the vendor's invoice total. Recommend On – then an AP clerk can input the vendor's invoice total in the header "Invoice Details" FastTab (if using that feature), and BC will alert if the lines don't add up (catching data entry errors).

Other Purchase & Payables notes: Much like S&R, this setup has many fields. For example, **"Combine Shipments"** doesn't apply here (that's a sales function), but **"Shipping Agents"** and **"Freight Setup"** are handled elsewhere (e.g. set up Shipping Agent codes for use on purchase orders if needed). One field not listed above is **"Archive Blanket Orders"** – which you can enable if using blanket purchase orders. Also, if using **Lot/Serial Tracking**, ensure Inventory Setup's "Specific Cost" settings and Exact Cost Reversing (above) are set appropriately to manage cost links on returns.

Inventory Setup (Table 313)

The **Inventory Setup** table governs inventory costing, valuation, and basic item-handling rules. These settings are critical for how costs flow to the G/L and how inventory is tracked. Important fields to configure:

Field	Default Value	Recommended Setting	Considerations
Automatic Cost Posting	On (True)	On	When On , any inventory transactions post the adjusted cost to the G/L in real time. This means inventory-related accounts (Inventory, COGS, etc.) update immediately whenever an item entry is created. Default is True in BC (to keep G/L synchronized). Recommended On for most, so that inventory ledger and G/L are always in sync. If turned off, you must run the batch job "Post Inventory Cost to G/L" periodically – this adds complexity and risk of mismatches. Typically leave it On , especially in the US where real-time financial reporting is expected.
Automatic Cost Adjustment	Always	Always (or an appropriate interval)	Determines if and how BC automatically adjusts item costs forward to output/ shipments. Default is Always (meaning any time a cost changes – e.g., a purchase invoice comes in after the sale – the system will adjust the cost of sale entries immediately). "Always" ensures inventory values and COGS are up-to-date, which is great for accurate margins. However, with high volume, constant adjustments could impact performance. Other options: Daily , Monthly , Quarterly , or Never . For most small/mid companies, Always is fine (default). If performance issues arise with large item ledgers, consider switching to Daily or Monthly – which will limit how far back in time the automatic adjustment looks for cost changes. But ensure a regular schedule of running the Adjust Cost - Item Entries job if not Always. In summary: stick with Always unless advised otherwise by performance considerations.

Field	Default Value	Recommended Setting	Considerations
Expected Cost Posting to G/L	On (True)	On (True)	<p>When On, expected costs are posted to interim accounts in the G/L. This means when you receive inventory or ship sales (before the invoice is posted), BC posts an interim inventory and interim COGS entry, giving an accrual of expected cost. Upon invoice matching, it reverses interim and posts actual. We recommend On so that the G/L reflects inventory in transit and received-not-invoiced liabilities. It provides a more accurate picture of inventory and COGS in real time (with accruals). If the client prefers not to post any cost until invoicing (which can cause big jumps when invoices post), they could turn it off – but most keep it On for proper accrual accounting. If on, ensure Interim accounts are set in the posting setup (Inventory Interim and COGS Interim accounts).</p>
Average Cost Calculation Type	Item	Item or Item&Location&Variant	<p>This setting matters if Average Costing is used as an item's costing method. Options: Item or Item&Location&Variant.</p> <ul style="list-style-type: none"> Item: A single average cost is calculated per item (across all locations and variants). Item & Location & Variant: A separate average cost is maintained for each location and variant of the item. <p>Default is often Item. If the business tracks inventory in multiple locations AND wants to maintain different average costs per location (e.g. due to separate freight-in costs), choose the latter. Otherwise, Item is simpler (one average cost across company). Decide based on how they value inventory.</p>

Field	Default Value	Recommended Setting	Considerations
Average Cost Period	Day (or Month)	Day (for accuracy)	<p>Defines the interval at which average cost is calculated/fixed. Common options: Day, Week, Month, Quarter, Fiscal Period. Default in BC tends to be Day (meaning the cost is averaged daily; transactions within the same day share one average cost bucket). Day gives the most granularity and is recommended in most cases for up-to-date costing. Using longer periods (Month, etc.) can simplify calculations but may distort interim margins (because cost changes within the month wouldn't reflect until period end). For US GAAP, daily (or even per transaction which "Day" effectively achieves) average is typically acceptable and gives precise COGS. So we suggest keep Day unless a specific reason to use Monthly (e.g. to reduce cost adjustment frequency, but that's less of an issue with modern hardware).</p>
Default Costing Method	FIFO (or Average)	FIFO (commonly)	<p>The costing method that will be default when new items are created. Common choices: FIFO, Average, LIFO, Specific, Standard. In a US distribution context, FIFO is widely used (first-in, first-out valuation). If the client uses Standard Cost (common in manufacturing), you might set that as default and maintain standard costs on items. Average is sometimes used for commodities or pooling costs (ensuring cost of item is always weighted average). LIFO is rare (and not compliant for IFRS, though allowed in US tax, it's seldom used in systems due to layered tracking complexity). Specific is used when each item unit's cost is tracked (requires serial numbers or lot costing). Recommendation: Set the default to the method most of their items will use (e.g. FIFO for trading companies, Standard for mfg with stable costs, Average if they prefer smoothing). FIFO is a safe default if unsure, as it's common and straightforward. Note this is just a default for item card creation – each item can be changed individually after creation.</p>

Field	Default Value	Recommended Setting	Considerations
Allow Negative Inventory	On (True)	Off or On per policy	<p>This field (called Prevent Negative Inventory in older versions when reversed) determines whether the system allows posting an item below zero on hand. If allowed (Prevent Negative = False), you can ship items even if inventory is zero/negative; inventory will go negative and later receipts will adjust. If not allowed, BC will block posting that would cause negative. In the US, many small businesses allow negative inventory for practicality (ship now, receive later). However, best practice is not to allow negative inventory (set Prevent Negative = True) to maintain accurate inventory records. The decision depends on client operations: <ul style="list-style-type: none">If they have good inventory control and want accuracy, set Prevent Negative Inventory = On (i.e. do NOT allow negatives).If they occasionally need to ship before item receipt is recorded (and are okay with temporary negative stock), leave it allowed (Off). They will need to manage those carefully to avoid cost issues. Be cautious: negative inventory can lead to costing issues (BC will guess at cost, then adjust later). Our recommendation: disable negative inventory for better data integrity, unless there's a strong need.</p>
Location Mandatory	Off (False)	<i>On</i> if multi-loc	<p>If enabled, every inventory transaction must specify a Location Code. Default is off. If the company uses multiple warehouses or stores, it's wise to turn Location Mandatory = On so nothing can be posted without a location. If they have only one location or don't track stock by location, leave it off (no harm). For multi-site clients, definitely turn it On to avoid "undefined" location inventory.</p>

Field	Default Value	Recommended Setting	Considerations
Lot Warehouse Tracking	Off (False)	<i>Off</i>	(Applicable if using directed warehouse) – Controls if lot/serial tracking is enforced at warehouse pick level. Only matters in advanced WMS setups; leave as default unless implementing directed pick/put-away and needing to capture lot info at warehouse activities. Standard lot/serial tracking (on item ledger) is set per Item Tracking Code, not here.
Consistency Check on Posting	Off	<i>Off</i>	(In some versions) This might ensure no cost anomalies during posting. Generally not exposed to user; trust system defaults.
Reserve (Ability to reserve stock)	Optional	<i>Optional</i>	Defines if reservations are allowed on items (Optional, Always or Never). Default is Optional – users can manually reserve inventory to orders. Keep at Optional for flexibility unless the client wants to Always enforce reservations or disallow entirely (Never). Optional is standard.
New Item Nos.	<i>(Blank or a series)</i>	<i>Set if using Item creation from contacts</i>	If using the “Create Item from Description/No.” features, BC can auto-number those new items using this series. If blank, it will prompt user for item number. It’s often blank by default since many companies plan item numbering. If the client will use quick item create (e.g. from sales docs), define a series here (like MISC-#####). Otherwise, leave blank (forcing manual assignment for new items via normal process).
Default Warehouse Handling Time	0D	<i>Enter if using order promising</i>	If the company wants to include a default internal handling time for warehouse in delivery date calculations (order promising), set a value (e.g. 1D = 1 day). This works with Available to Promise date calculations. Default is none. If lead times are tracked at item/vendor level, this might not be needed globally.
Combination of SKU and Location Mandatory	Off	<i>Off</i>	There is also a setting controlling if Stockkeeping Unit records are required for items at locations. Typically not mandatory unless they want to force use of SKUs. Leave as default (off).

Note: Many Inventory Setup fields revolve around costing and financial impact. The above recommendations ensure that **cost postings are automatic and real-time**, which is usually preferred. If performance becomes an issue with cost adjustment, switch Automatic Cost Adjustment to a less frequent setting (e.g. Daily) but schedule the **Adjust Cost** batch job off-hours. Also, after initial configuration, test a full purchase→shipment→invoice cycle with inventory to verify that interim postings and adjustments behave as expected (especially if expected cost = on and negative inventory possibly allowed – you want to ensure COGS adjusts properly when actual cost arrives).

Warehouse Setup (Table 5769)

The **Warehouse Setup** table controls company-wide settings for advanced warehouse management (if using features like warehouse receipts, picks, movements, etc.). In a basic implementation without directed warehousing, many of these fields remain default. If the client uses warehouse documents (multiple locations with “Require Receive/Ship” processes), configure these:

Field	Default Value	Recommended Setting	Considerations
Warehouse Receipt Nos. / Put-away Nos. / Pick Nos. / Shipment Nos.	<i>(Preset codes)</i>	<i>Verify/Set</i>	Number series for warehouse documents (independent from inventory documents) ²⁵ . Ensure each is assigned a series if using warehouse receipts (e.g. WH-REC), put-aways (WH-PUT), picks (WH-PICK), and shipments (WH-SHIP). The Cronus demo usually has these. If the client is using basic inventory without these documents, these won't be used (and can stay default). But if they decide to enable warehouse processes, having series in place is important.
Registered Whse. Pick Nos. / Registered Put-away Nos.	<i>(Preset)</i>	<i>Verify</i>	These are series for “registered” documents when using the warehouse register function (a step in advanced scenarios). Likely preset. Ensure they exist if needed. Otherwise, not typically touched by users.
Require Receive	Off (False)	<i>Off</i> (unless WMS)	Global toggle – if On , the company uses Warehouse Receipts for inbound processing ²⁶ . In practice, this is often left off and set per Location instead. Typically, to implement warehouse receipts, you mark specific Locations to Require Receive. The global setting can force it for all locations. We recommend leaving this Off and controlling on the Location card (so you can have some locations with advanced receiving and some without). Only set On here if <i>all</i> locations should use the warehouse receipt process and you want to ensure none can bypass it.

Field	Default Value	Recommended Setting	Considerations
Require Put-away	Off	<i>Off</i> (unless WMS)	Similar to above – if On , you must use Warehouse Put-away documents after receipts ²⁶ . Default off. Manage per Location's setup (set Require Put-away on each warehouse location that needs it). Keep Off globally unless you want to enforce for every location.
Require Pick	Off	<i>Off</i> (unless WMS)	If On , requires using Warehouse Picks for outbound shipments ²⁷ . Default off. Again, typically set on the Location (Require Pick). If only some warehouses need picking documents, leave global off. If the client is implementing standard or advanced warehousing across the board, you could turn it on, but it's safer to manage via Location.
Require Shipment	Off	<i>Off</i> (unless WMS)	If On , requires using Warehouse Shipment documents for outbound ²⁷ . Same logic: default off; typically enabled per Location. If one location is a simple site (no warehouse docs) and another is a distribution center (with warehouse docs), you wouldn't enable globally. So keep Off unless every shipment will use a warehouse shipment doc.
Receipt/ Shipment Posting Policy	Individual (likely)	Individual	These options govern how warehouse receipts or shipments group source documents for posting. "Individual" means one source order per warehouse receipt posting. "Combined" might allow posting multiple orders together. Default is usually Individual , which is safest to ensure clear posting to each PO/SO. We recommend Individual unless the client specifically wants to consolidate multiple orders in one warehouse receipt post (rare, and even if so, you can combine them in one receipt doc but still post individually).
Copy Item Descr. to Entries	On (True)	On	If on, when posting warehouse documents, the item's description is copied to the warehouse entries (and subsequently to item ledger entries) ²⁸ . Typically True; keep On to ensure descriptions flow through. It doesn't hurt and can help in warehouse registers.

Field	Default Value	Recommended Setting	Considerations
Internal Whse. Movement Nos. / Registered Movement Nos.	<i>(Preset)</i>	<i>Verify</i>	If using Warehouse Movements (internal movement orders within warehouses), ensure the numbering is set (e.g. WH-MOVE). Usually preset. Verify these exist if the client will use internal movements.
Last Whse. Posting Ref. No./Seq.	<i>(auto-managed)</i>	N/A	These keep track of the last posting reference for warehouse register entries. The system updates these; no need to set manually.
Use Legacy Whse. Posting	<i>(Not shown, possibly via method)</i>	N/A	There might be a hidden toggle (UseLegacyPosting) related to how warehouse posting is handled ²⁹ . It's not usually exposed to users. Assume default modern behavior.

Note: Warehouse Setup is primarily for enabling advanced flows. In typical implementations that do not use directed pick/put-away, you may leave most of these off and not worry about them. If the client grows into needing these features, they can be configured then. Also remember to configure each **Location Card** with appropriate settings: e.g. mark specific locations as Require Receipt, Require Shipment, Use Bins, Directed Pick/Put-away, etc., as that overrides or complements the global settings. The **Location** setup will have fields like "Always Create Pick Line" or "Always Create Put-away Line" (for auto-generating lines even when zero quantity; see standard docs) – those are fine-tuned per location.

Manufacturing Setup (Table 99000765)

If the client uses the Manufacturing module (production orders, MRP planning, etc.), the **Manufacturing Setup** table must be configured. It includes default number series and production control parameters. Important fields:

Field	Default Value	Recommended Setting	Considerations
Production Order Nos. (Simulated/Planned/Firm Planned/Released)	<i>(Preset codes)</i>	<i>Verify series</i>	Number series for various Production Order statuses. By default: <ul style="list-style-type: none">Simulated Order Nos. – for “what-if” cost calculations (often SIM-series).Planned Order Nos. – system-suggested planned orders (PLAN- series).Firm Planned Order Nos. – firm planned (FPLAN- series).Released Order Nos. – actual production orders (REL- or PROD-series). Ensure these exist and align with any client preferences. Typically, you might only manually create Released orders; the others are system-generated by planning. But numbering should still be in place. Adjust if the client wants a specific format for prod order IDs.
Routing Nos. / Production BOM Nos. / Work Center Nos. / Machine Center Nos.	<i>(Preset codes)</i>	<i>Verify series</i>	Number series for manufacturing master data: Routings, Production BOMs, Work Centers, Machine Centers. Confirm that each has a series (e.g., ROUTE, PBOM, WC, MC). These usually come preset. Change only if the client wants different code formats for these records.

Field	Default Value	Recommended Setting	Considerations
Default Flushing Method	Backward	Backward (common)	<p>The default Flushing Method for components when new items are created. Options: Forward, Backward, Manual.</p> <ul style="list-style-type: none"> Backward (default): components are automatically deducted (flushed) at time of production order completion (output posting). This assumes consumption happens during production and flushes at the end. Forward: components are flushed at production order release (start), assuming you consume everything up-front. Manual: no automatic flushing – consumption must be posted via journals or scans. <p>Most companies use Backward for components so that actual usage is recorded when finishing production. Backward is recommended if inventory is reasonably accurate and you want easier processing. If the client wants tighter control or uses actual picking before production, they might choose Manual (for explicit consumption entries) or Forward (if they issue all material at start). But Backward is generally the best starting point for automatic consumption**. (Note: flushing method can be overridden per item on its Manufacturing FastTab, this is just the default for new items.)</p>
Default Finishing Method (Output)	Manual (implicitly)	Manual	<p>There's also output flushing, but by default output (finished goods) is always posted manually via output journal or production order output. BC doesn't auto-flush output; you must record output quantity. So there's no direct field for output flush here (the "Preset Output Quantity" option exists but is rarely changed). Keep the standard approach: users report output manually.</p>

Field	Default Value	Recommended Setting	Considerations
Normal Starting Time / Normal Ending Time	07:00 / 15:30 (for example)	<i>Company work day times</i>	These define the default work day start and end time for finite capacity scheduling. E.g., 7:00 AM to 3:30 PM by default in Cronus. Set these to the plant's typical shift times (e.g., 08:00 to 17:00 for an 8-5 schedule). This is used when scheduling operations on the shop calendar if no specific shop calendar is given. Adjust to match actual working hours for realistic scheduling.
Dynamic Low-Level Code	Off (False)	Off or <i>On for complex prod.</i>	If On , the system dynamically updates the low-level code of BOMs when BOMs change (ensuring proper MRP explosion levels). If off, you can run a batch to update LL codes. In most cases leave On (was False historically for performance). If the client has deep BOMs and frequent changes, On ensures planning respects new structure. For small companies, performance impact is negligible, so enabling it is fine.
Components at Location	(Blank)	<i>Blank or a specific code</i>	If filled, this forces all production order component consumption to be taken from a single location code regardless of the production order's location. Usually blank (meaning use the production order's location for components). Keep blank unless there's a scenario like all components are at a central stock location while production output is posted at another – rare. Usually each plant has its own components.
Planning Warning	On (True)	On	If enabled, the system will display warnings during planning worksheet calculations for issues (like if planning parameters are inconsistent). Keep On so planners get alerts about unusual situations (e.g. safety stock not met, etc.).

Field	Default Value	Recommended Setting	Considerations
Combined MPS/ MRP Calculation	On (True)	On	If On , the planning run will combine Master Production Schedule and Material Requirements Planning in one go. Default true and recommended to keep on (it simplifies the planning process to one run). Only in very specific cases would you separate MPS (forecast/planned prod) from MRP – typically keep combined to generate a unified plan.
Use Forecast on Variants / Use Forecast on Locations	Off (False) / Off	<i>On if forecasting by variant or location</i>	By default, off – meaning a production forecast is consumed at item level globally. If the client creates production forecasts that are broken down by Item Variant or by Location, set these to On respectively so that forecast consumption is segmented accordingly. If they forecast just item totals, leave these off.
Default Dampener Period / Default Dampener %	0D / 0	<i>Set moderate values</i>	The dampener period is a horizon (e.g. 7D for a week) within which the system will not suggest rescheduling existing orders – to avoid nervousness (constant reschedule suggestions) for near-term. Default 0 means no dampening by period. A typical setting might be 7D or 14D to freeze the next week or two of production schedule from trivial changes. Dampener % similarly prevents suggestions to change quantity by small percentages – if change is within this %, system may ignore. Default 0 means even small changes will trigger an action message. If minor changes are bothersome, set maybe 5% or 10%. We recommend setting a Dampener Period of at least a few days (according to how rigid their schedule is) – e.g. 7D – so that once an order is close, planning won't keep moving it. Dampener % could be perhaps 5 (meaning <5% quantity difference won't suggest change). These reduce system nervousness.

Field	Default Value	Recommended Setting	Considerations
Default Safety Lead Time	0D	<i>X Days</i> (if needed)	A global safety lead time that gets added to lead times on planning. Often companies will put 1D or 2D to pad schedules (meaning always plan to finish 1-2 days early as a buffer). If blank/0, no extra buffer. Decide if the client wants a cushion on all supply. Often set to a few days to account for unforeseen delays. Alternatively, safety lead time can be set per item. If doing per item, leave global blank.
Blank Overflow Level	0 (Option likely meaning Level=0)	<i>0 (Standard)</i>	This is a manufacturing coding concept (for BOM levels). Usually leave default (0). Only advanced manufacturing developers typically adjust this for custom low-level code handling.
Show Capacity Unit	Hours (e.g. "Hours" code)	Hours	Determines in what unit to display work center/machine center capacity. Often set to Hours (so capacity is shown in hours in the schedule). Some might use minutes if they prefer fine detail. Hours is standard. Keep Hours unless the client explicitly schedules in another unit.
Finishing Policy – Finish Order without Output	Off (False)	<i>Off</i>	If On , you can change a production order to Finished status even if you haven't posted any output (good for closing a canceled order). Default off. It's usually fine to leave off (forces you to post output or scrap for all components). If they want the ability to close orders that were started but never actually produced anything, turning it On can allow that cleanup. Use with caution – usually you'd post some 0 output or scrap rather than just finish with nothing.
Include Non-Inventory Costs	Off (False)	On (True)	Labeled "Inc. Non-Inv. Cost to Prod." – If True, the cost of Non-Inventory type items (like services or miscellaneous charges) consumed in production are included in the produced item's cost. Default may be off historically. We recommend On so that any non-inventory costs (which might represent subcontractor services, etc.) are added into WIP and final production cost. Otherwise, those costs would not roll into the item's value (and you'd treat them as period expenses). Most manufacturing firms want all production-related costs in the item's cost, including outside services, so turn this On .

Field	Default Value	Recommended Setting	Considerations
Load SKU Cost on Manufacturing	Off (False)	<i>On</i> if using SKUs extensively*	If enabled, when calculating standard cost rollups or production, it will consider SKU-specific costs. This is more relevant for multi-location costing. If using SKUs with different costs at different locations, On ensures those specific costs are loaded. If not, leave off (it will use item's base cost). For simplicity, off unless needed.
Manual Scheduling	Off (False)	<i>Off</i> (usually)	If enabled, marking a production order as "Manual Scheduled" means changes in due date will not recalc backward/forward automatically. Generally off – the system auto-schedules by default. If a production scheduler will manually schedule certain orders and doesn't want MRP to change them, they would mark those orders as Manual Scheduled (and you might turn this on for those cases). Leave default and handle via order settings.
Safety Lead Time for Man. Sch.	0D	<i>As needed</i>	If Manual Scheduling is used, this field adds a buffer to End Date to derive Due Date on manual schedule orders. If not using manual scheduling much, ignore. Otherwise, set a small buffer (like 1D) if desired.
Default Gen. Bus. Posting Group (for Production Orders)	<i>(Blank)</i>	<i>Set if needed</i>	This sets a default General Business Posting Group on new Production Orders for their output transactions. If blank, the production output uses the Gen. Bus. Posting Group of whoever/whatever is defined on output (often not relevant since output posts to inventory accounts via inventory posting group). Some companies may set a dummy "PROD" business group if they want production output to hit specific sales accounts (not typical). In most cases, leave blank; it will derive from the Customer/Vendor if needed in consumption of subcontracting. Not heavily used – you can ignore unless advised otherwise.
Preset Output Quantity	No (probably an option like None)	<i>None</i>	This is an option field (likely Yes/No or By Item) to automatically prefill the output quantity on production orders. Default is not to preset. Typically, leave as is (manual entry of output is safer).

Note: Manufacturing Setup often comes with good defaults. The key is to align with the client's production management style. After configuring, test a scenario: create a production order, consume materials (auto flush or manual as set), post output, and ensure costs and outputs flow as expected. For planning (MRP/MPS), verify that forecast usage, dampeners, and lead times produce sensible action messages. Manufacturing is complex, so these settings might be revisited after initial runs.

Fixed Assets Setup (Table 5600 series)

(If the client uses the Fixed Asset module, configure these fields. Otherwise, this can be skipped.) The **Fixed Asset Setup** page defines defaults for managing assets and depreciation posting. Key fields:

Field	Default Value	Recommended Setting	Considerations
FA Nos.	<i>(Preset, e.g. FA-0001)</i>	<i>Confirm/Change</i>	Number series for new Fixed Asset cards. Ensure it's defined (e.g. "FA" series). If the client wants asset IDs to follow a pattern (like different prefix for vehicle vs equipment, etc.), they might not use a single series – but BC only allows one default. Typically, one series is fine (you can categorize assets by class/subclass codes instead). Set or verify the series code.
FA Journal Template	FIXEDASSET (or similar)	<i>Use default</i>	The default General Journal Template for FA transactions, typically "FIXEDASSET". Usually fine. Ensure a batch exists under that template or adjust if needed (some use the General Journal for FA posting, but by default BC uses a separate FA G/L Journal template).
Default Depreciation Book	COMPANY (or blank)	<i>Set principal book</i>	If using multiple depreciation books (e.g. one for accounting, one for tax), you can set one as the default. In the US, often there's one "COMPANY" book for GAAP and perhaps an "IRS" book for MACRS. Set the primary one (usually financial book) as default. This ensures new assets automatically attach that book.

Field	Default Value	Recommended Setting	Considerations
Allow Posting to Main Assets	Off (False)	Off (usually)	If on, allows direct posting of entries to a main asset that has sub-assets (components). Best practice: keep Off ³⁰ , meaning if an asset has components, you post only to components. If the client doesn't use asset componentization, this isn't too relevant. Off by default is safer to prevent confusion (you wouldn't accidentally post depreciation to the summary asset).
Copy FA Descr. to G/L	On (True)	On	When posting FA transactions to G/L, copy the asset's description. Default on; recommended On so G/L entries for depreciation/disposal reference the asset name for clarity.
Use FA Reclassification Journal	On (True)	On	If On, enables the FA Reclassification Journal for transfers, splits, etc. (On by default and no reason to disable – it's the tool to move assets between classes or locations). Keep On .
Depreciation until posting date	Off	<i>Off</i>	If on, system might calculate depreciation up to the posting date of a depreciation run rather than strictly period by period. Usually Off, meaning depreciation is calculated period by period as defined in the Depreciation Book (e.g. monthly). Leave it Off unless a very specific need to pro-rate to exact posting dates.
Allow Partially Depreciated Assets	On	On	Allows you to acquire an asset and depreciate it even if it's partially through its useful life (like catch-up). Typically yes, allow it. Default likely On. Keep On to not block scenarios like bringing in an already-old asset.

Field	Default Value	Recommended Setting	Considerations
Depr. Book Nos. / FA Journal Batch etc.	<i>(Varies)</i>	<i>Verify</i>	There may be fields to set number series for Depreciation Book Nos. (IDs for different books) and default FA Journal Batch Name for automatic processes. The Cronus default usually covers these. Ensure Depreciation Book Nos. series exists (if you plan to add new books). Default batch for FA G/L journal can remain blank (the user can choose when running suggest depreciation).
Maintenance Nos. / Insurance Nos.	<i>(Preset or blank)</i>	<i>Set if using maintenance/ insurance</i>	If the client will use FA maintenance or insurance tracking, there are number series for those records. If not using those features, can ignore. If yes, define series (e.g. MAIN- for maintenance registrations, INS- for insurance policies).
Default Insurance %	0	<i>Set if needed</i>	If tracking insurance, a default percentage insured. Not critical unless using insurance module.
Recurring Method	Balance (or Equal)	<i>Balance</i>	How depreciation is calculated in recurring journals – usually “Balance” meaning it will depreciate whatever remains. This is technical; default is fine.

Note: After setting up FA, define at least one **Depreciation Book** (e.g. “COMPANY”) with its own settings for how depreciation is calculated (straight line, etc.), posting frequencies, and integration (whether FA posts to G/L automatically). In the US, you might have a “BOOK” depreciation (for books/GAAP) and a “TAX” depreciation book (no G/L integration, for tracking tax depreciation like MACRS). The **FA Posting Groups** also need setup – map assets to balance sheet accounts (cost, accumulated depreciation) and income statement (depreciation expense, gains/losses). Ensure those are configured before starting to acquire assets. The FA Setup mostly ensures numbering and basic rules are in place. Test by creating a fake asset, posting an acquisition cost, and running depreciation to see that it hits the right accounts.

Marketing Setup (Table 5079)

If the client uses **Relationship Management (CRM)** features in BC (contacts, campaign, opportunity tracking), the **Marketing Setup** table holds relevant defaults:

Field	Default Value	Recommended Setting	Considerations
Contact Nos.	<i>(Preset, e.g. C-1000)</i>	<i>Verify series</i>	Number series for Contacts (prospects, companies, persons). Ensure it's set (Cronus uses C- as prefix). Adjust if needed (e.g. "CONT" prefix). Contacts can include both customers/vendors and unrelated leads, so one series usually suffices.
Business Relation Codes	<i>(Pre-filled codes)</i>	<i>Review</i>	BC might have default relationship codes (like PROSPECT, BANK, etc.). These categorize contact relationships. Ensure they align with what client wants. You can add codes for types of relationships (Consultant, Influencer, etc.). Not critical to change unless needed.
Salutation Format	<i><Company/ Person></i>	<i>Review locale</i>	Defines how the Salutation is generated for contacts (e.g. whether to use first name, last name, title). US typical format for a person might be <Title> <Last Name> (like Mr. Smith). Check the default and adjust if formal or informal salutations are desired on correspondence. For companies, usually just company name. The field in Marketing Setup might allow setting a formula. Otherwise, this can be handled in report layouts.
Duplicate Search (Search strings for duplicates)	<i>(Some default fields)</i>	<i>Use defaults</i>	The system can search for duplicate contacts based on criteria (like matching name, phone). Marketing Setup may have configuration of which fields constitute a "duplicate". The defaults (Name + City, etc.) are usually fine. If the client has a strong need to avoid dupes, consider enabling more strict rules. But typically, accept the default duplicate rules.
Default Contact Type	Company	Company	When creating a new Contact from scratch, default as Company or Person. By default, a new Contact card opens as Company (assuming you're creating a business account). That's fine; you can switch to Person when needed. Leave as Company default unless the client primarily deals with individuals.

Field	Default Value	Recommended Setting	Considerations
Synchronize with Vendors/ Customers	On (True)	<i>On</i>	If enabled, when you create a Customer or Vendor from a Contact or vice versa, BC links them (so updates can sync if configured). Typically on by default. Keep On if using that integration – it's handy: e.g., promote a contact to a customer and maintain link. If the client isn't using contact->customer conversion, it doesn't harm to leave on.
Email Logging (Client ID, etc.)	<i>(Blank)</i>	<i>Configure if using</i>	If they plan to use Email Logging (capturing emails from Exchange into BC as interactions), you need to set up an app registration (Client ID, Secret) and enter the Client ID in Marketing Setup. By default blank. If not using email logging, ignore. If yes, follow Microsoft's guide to register the app in Azure AD and input the values here.
Relationship Management Enabled	<i>N/A</i>	<i>N/A</i>	(If there's a master on/off, Business Central usually has everything on by default, so no field for it. Setup presence implies it's on.)

Note: The Marketing Setup is relatively minor. More critical is the **Salespersons, Responsibility Centers, Segmentation**, etc., which are set up as needed in their own pages. Also, ensure **Number Series** for **Opportunities, Campaigns, To-dos** if those are used (they might pull from Marketing Setup or require separate config). Check the Manual Setup list for any CRM-related setup pages to configure if the client will use them (e.g. **Opportunity Close Codes, Interaction Templates** for logging interactions). Those typically have sensible defaults or can be created as needed during use.

Service Management Setup (Table 5911)

For organizations using the **Service module** (service orders, repair management), configure the **Service Management Setup** (often called *Service Mgt. Setup*):

Field	Default Value	Recommended Setting	Considerations
Service Order Nos. / Service Contract Nos. / Service Quote Nos.	<i>(Preset series)</i>	<i>Verify series</i>	Number series for service documents: service orders (work orders for repairs), service contracts, service quotes. Ensure these exist (e.g. SVO for orders, SVQ for quotes, etc.). Adjust if needed for client's preferred prefixes.

Field	Default Value	Recommended Setting	Considerations
Serv. Contract Template	STD (possibly)	<i>Review</i>	A default Service Contract template code may be specified which sets default billing periods, etc., for new contracts. Check if one exists (like a "STANDARD" contract template). If the client offers service contracts, define templates (in the Service Contract Template page) and set one as default if appropriate.
Response Time (Hours)	24 (for example)	<i>Client's SLA</i>	Default response time to a service order (for KPI tracking). Set to whatever is considered standard (e.g. 24 or 48 hours). This can be used to measure if service calls are responded to on time. Not critical unless they use service KPIs.
Service Zone (default)	<i>(Blank)</i>	<i>Set if using zones</i>	If service management uses zones/regions for dispatch, you might set a default zone for new customers or service orders. If not using, ignore.
Allow Service Item creation from Item	On	On	If enabled, when selling an item that is serviceable, BC auto-creates a Service Item (an asset record for that item for warranty/servicing). Default is usually On. Recommended On so that when an item marked with "Create Service Item" is sold, you can track it in service. If the client doesn't want that, they can disable at item level or turn this off globally. But generally leave it on – it doesn't create service items unless items are flagged accordingly.
Warranty Default (Months)	0	<i>Set if common warranty</i>	You can specify a default warranty period for new Service Items (e.g. 12 months). If many products have the same warranty length, set it here. Otherwise, leave 0 and input warranty per item or item category.
Preventive Maint. Buffer (Days)	0	<i>Set if using PM</i>	If they use Service Tasks for PM, this could define a buffer for scheduling. Leave default if not using maintenance in service module.

Field	Default Value	Recommended Setting	Considerations
Service Posting FastTab (accounts)	<i>Accounts set in Posting Groups</i>	<i>Verify via posting groups</i>	Service Management relies on Service Posting Groups and Service Product Posting Groups to map revenues, costs, etc. There may not be direct account fields in setup (as accounts are usually driven by posting groups). Just ensure Service Posting Groups are set up (e.g. one for labor, one for parts) and mapped to G/L accounts (like service revenue accounts separate from item sales). No specific field here to set, but don't overlook posting group setup.
Default Contract Grace Period	1M (maybe)	<i>As policy</i>	After a service contract expires, how long you still service under it. If applicable, set e.g. "1M" for one month grace. Otherwise leave blank if no grace.
Service Text on Invoice	Off	<i>On if needed</i>	If enabled, allows extra text from service lines to print on invoices. If they want detailed descriptions from service orders to flow to invoices, might turn on.
Combine Shipments on Invoice	Off	<i>Off</i>	(If present) Possibly whether to combine multiple service orders into one invoice if for same customer. Usually off; invoice per order. Could enable if needed.

Note: Service Mgt. is less commonly used. If the client uses it, they'll also need to set up **Service Item Groups**, **Service Price Groups**, etc., which is beyond the scope here but crucial for proper operation. The Setup mostly ensures numbering and some default behaviors are in place. Always test by creating a service order, posting it, and seeing that an invoice generates correctly to verify all needed posting groups and series are set.

Number Series (Table 308 and 309)

Throughout the above setups, we referenced various **Number Series**. It's important to ensure all required number series are created (in **No. Series** table) with appropriate **No. Series Lines** defining starting/ending numbers. Below is a summary of typical series to check in a US Business Central implementation:

Series Code	Purpose	Default Format (Example)	Recommended Setup	Considerations
CUST	Customer Nos.	C-10000...	Prefix with a letter (C or CU) to distinguish customer IDs from others. Ensure Default Nos. = Yes (BC will auto-assign next customer number) and Manual Nos. = No (to prevent user overrides, unless desired). Starting No. should have enough padding (e.g. C-00001 or 10000) for expected count of customers.	
VEND	Vendor Nos.	V-10000...	Similar approach as customers. If the client has existing vendor IDs, you might import those and then continue a sequence. Otherwise, use a prefix like V-. Default Nos. typically Yes, Manual Nos. maybe allowed if they want to assign certain vendors a specific ID.	
ITEM	Item Nos.	1000... or PROD-0001...	Item numbering can vary widely. Many companies use all-numeric. If so, ensure the Starting No. is a number large enough (e.g. 10000). If they use categories or manual meaningful numbers, you might set Manual Nos. = Yes and Default Nos. = No, and use templates to assign. If auto, pick a format (with or without prefix) that suits them. Make sure to cover both inventory and non-inventory items (often one series is fine).	

Series Code	Purpose	Default Format (Example)	Recommended Setup	Considerations
SO (Sales Order)	Sales Order Nos.	SO-0001...	Prefix with SO or use numeric range distinct from purchase. Default Nos. Yes (so each new order gets next number). Manual usually No (you don't want salespeople picking order numbers). Ensure the Posted Shipment Nos. and Posted Invoice Nos. have their own series (commonly PS- for posted shipment, and SI- or INV- for posted invoices). Often, Posted Invoice Nos. can share a series with sales invoices if desired or be separate – many use one sequence for all posted sales invoices. Make sure it's clear to the client what numbering they prefer for posted documents (some want the same number as the order, but BC out of the box doesn't reuse order numbers for invoices – it makes new ones). Usually, keep them separate for full traceability.	
PO (Purchase Order)	Purchase Order Nos.	PO-0001...	Similar logic to SO. Distinct prefix to avoid confusion with sales. Posted Receipt Nos. and Posted Invoice Nos. likewise – often PR- for receipts, PI- for posted purchase invoices. Some companies align purchase invoice number with vendor's invoice number instead, but those vendor invoice numbers go in External Doc. No., not as our primary key. So we still need our own PI sequence for posted purchases. Ensure Allow Gaps in Nos. is checked if required by audit (some jurisdictions require no gaps in invoice numbers – US is generally fine with gaps, but check if any requirement; BC by default allows gaps but records voids via No. Series List).	

Series Code	Purpose	Default Format (Example)	Recommended Setup	Considerations
SHIP (or WH-SHIP)	Warehouse Shipment Nos.	WHS-0001...		If using warehouse docs, prefix with WH or similar. Typically shorter sequences since internal. Ensure these series have Default Nos. = Yes and Manual = No (you want system to assign).
BANK	Bank Account Nos.	BANK-0001...		For internal bank accounts (the Company's bank accounts), if many, a series can be used. Many organizations assign bank codes manually (like CHASE, BOFA1, etc., meaningful). If they prefer meaningful, set Manual Nos = Yes. Otherwise, an auto number is fine. Not a high-volume record so either way is okay.
FA	Fixed Asset Nos.	FA-0001...		As discussed, if numbering assets sequentially. Some companies use categories like VEH-0001 for vehicles, EQUIP- for equipment. BC can't do multiple sequences out of the box without custom code or manual numbering. If they strongly want different formats per asset class, consider Manual = Yes and let them enter (with guidance). Otherwise use one sequence. If using one sequence but wanting classification, you can incorporate a bit (like FA-V0001 vs FA-E0001 as separate series for vehicle vs equipment – possible by having two series and picking at creation, but BC can only auto-default one series in FA Setup). Decide based on client preference.

Series Code	Purpose	Default Format (Example)	Recommended Setup	Considerations
SERVICE (or SVO , SVR)	Service Order Nos.	SVO-0001...	Ensure series for Service Order, Service Contract, Service Quote as needed. If not using Service, no need. If using, likely want a prefix to distinguish from sales orders (since service orders might look similar to sales orders). E.g. SRO or SVC.	
MISC (for templates)	e.g. Item Template Nos.	T-0001...	If using the feature to auto-create records from templates (like Default Item from description), have a series for those ad-hoc creations. For example, if sales can create a new item on the fly, assign something like MISC-1000 series to differentiate those items. Similarly, if auto-creating Customer/Vendor from Contacts, series should already be CUST/VEND as above.	

When defining number series lines, set a sufficiently large **Ending No.** (e.g. "C-99999" or "C-ZZZZZ" if alphanumeric) to allow growth. The **Last No. Used** will update as numbers are assigned. **Default Nos.** should be enabled for any series that should auto-populate. **Manual Nos.** can be enabled if you want to allow users to override with their own numbering on occasion (commonly left off for transactional documents to preserve sequence integrity).

Ensure no required series is left unassigned in setup – otherwise, posting those documents will error. The Manual Setup page in BC can list any missing number series assignments.

Configuration Templates for Master Data

Business Central (latest version) uses **Templates** to help create master records (Customers, Vendors, Items, etc.) with default field values. In older versions these were under "Configuration Templates" (Table 8618/8619), but now they are more user-friendly pages like **Customer Templates (Table 1381)**, **Vendor Templates**, **Item Templates**, etc. We will address them generally as **Configuration Templates** – the concept is to define a template with certain field defaults to apply when creating a new record.

Templates save time and enforce consistency. For example, a *Domestic Customer* template might auto-fill the Customer Posting Group, General Business Posting Group, Tax Area Code, Payment Terms, etc., for any new domestic customer.

Below, we go through common templates and fields you'd set in each. (Field names in templates match the field on the record.) Typically, you'll create multiple templates per table if needed (e.g. a Domestic vs International customer template).

Customer Templates

When you create a new Customer, BC can prompt to apply a **Customer Template**. Out-of-box, you might create templates like "DOMESTIC" and "INTERNATIONAL" or templates by customer type (Retail, Wholesale, etc.). For each template, consider setting:

- **Customer Posting Group** – Default grouping for the receivables account. E.g. for Domestic customers, maybe "DOMESTIC" posting group links to a domestic A/R account. For international, perhaps a different posting group if you segregate receivables. Generally, in US, all go to one A/R account, so one posting group (e.g. "DOMESTIC" for all). If the client tracks different A/R accounts (not common), set accordingly. **Default:** Use a single "DOMESTIC" or "CUSTOMER" group for all, unless needed otherwise.
- **Gen. Business Posting Group** – Default tax/revenue group for the customer. For US, you might still use something like "DOMESTIC" here to drive sales accounts together with Gen. Product Posting Group in the posting setup. If you have separate groups for Export (no sales tax) vs Domestic (sales tax), you could have templates set Gen. Bus. Posting Group to "EXPORT" for international template (and in posting setup map that to perhaps a different sales revenue if needed, or just treat tax differently). Typically: one Gen. Bus. PG for all customers, unless you differentiate by market segment or tax logic.
- **Tax Area Code** – Very important for US. The template can set a default **Tax Area Code** (which represents the customer's sales tax jurisdiction). For example, a template for in-state customers might default Tax Area = your state (so state sales tax applies). For out-of-state, maybe a "OUTOFSTATE" tax area with no taxes (if not charging tax out of state). If the client mostly sells taxable in their state, the default template could set that state's tax area. Users can change per customer as needed. Alternatively, leave it blank in template and require user to choose based on the customer's address. **Recommended:** If most customers fall under one tax area (e.g. all in-home state), set it; otherwise, leave blank but don't forget to fill on each customer.
- **Tax Liable** – In US, generally **Yes** for customers where you must charge sales tax (tax areas determine the rate). The template for taxable customers should have **Tax Liable = TRUE** so that sales tax will calculate. If you have a template for, say, Resellers or Out-of-State (where you don't collect tax), set Tax Liable = FALSE in that template (and possibly also assign a "NON" tax area or blank area). This ensures no tax is calculated for those.
- **Payment Terms Code** – Default customer payment terms (e.g. NET30). If the majority of your customers are Net 30, the template should default that. You might have another template for customers with different terms (e.g. COD or Net 60).
- **Payment Method Code** – If commonly used (e.g. "CHECK" or "ACH" to denote how they pay), set a default. Not mandatory, but can be helpful.
- **Shipping Method Code** – If most customers use a default shipping method (like "GROUND"), you can set it. Often left blank as it varies per order.
- **Shipment Terms Code** – If applicable (e.g. FOB). Template can default FOB=Origin or similar if most are the same.

- **Location Code** (for orders) – If the company has multiple shipping warehouses and typically a certain group of customers is served from one, a template could set a default Location Code for their orders. Usually blank unless you segment by region and location.
- **Currency Code** – If you deal with foreign customers frequently and invoice in their currency, a template for that scenario could set the Currency Code (e.g. “EUR” for a European customer template). Domestic template would leave blank for USD (LCY).
- **Language Code** – If printing documents in another language for certain customers, the template could set that (e.g. FR for French, so their invoice prints in French if language captions are set).
- **Fin. Charge Terms / Reminder Terms** – If you use late payment fee calculations, you can assign default terms for finance charges and reminders. If not, leave blank.
- **Cash Flow Payment Terms Code** – For cash flow forecasting, if they use a different payment expectation than actual Payment Terms, could set. Not commonly changed, usually mirrors Payment Terms.
- **Invoice Disc. Code** – If invoice discounts are set up by customer group, you might set this to e.g. “STANDARD” so the customer gets those discounts. Many small businesses don’t use invoice discount codes; they might use Payment Terms to give early-payment discounts instead.
- **Customer Price Group / Customer Disc. Group** – If pricing or discounts are categorized, you could have templates default these. For instance, a “Retail Customer” template might set Price Group = RETAIL (though typically price groups are assigned per campaign or manually). Use if applicable.
- **Salesperson Code** – If most new customers are handled by a particular salesperson (or you create templates per sales region), set the default here. Otherwise leave blank to force user to pick the responsible salesperson on the customer.
- **Territory Code** – Similar to Salesperson; if using Territory for reporting, maybe default to a main territory or leave blank and assign manually.
- **Credit Limit (LCY)** – If the client extends a standard default credit limit to all new customers (say \$5,000), you can put that in the template. It will copy to the Customer Card (and you can adjust per customer later). If they evaluate credit case-by-case, leave it zero or a nominal amount and let users fill in.
- **Blocked** – The template can mark new customers as initially *Blocked* (e.g. for review). Typically you wouldn’t block by default unless the policy is every new customer is on hold until credit check. Usually leave it unblocked (No) for normal templates.
- **Dimension Values** – You can assign default global or shortcut dimensions via the template (e.g. a CUSTOMER GROUP dimension might default to “INDIVIDUAL” vs “BUSINESS” based on template). BC’s template lets you set up associated default dimensions ³¹. If the client uses dimensions like Region or CustomerType, link them in the template for consistency.
- **Email / Phone / Address fields** – Those will be entered per customer, usually not in template (except maybe country code if all domestic, you could default Country = US in template to save a step).

Once templates are defined, when a user creates a new customer, they select the appropriate template and all these fields pre-populate ³² ³³. This greatly speeds up data entry and ensures accounting fields are correctly set.

For example, using a **Domestic Customer** template with Tax Liab = Yes, Tax Area = [HomeState], Posting Groups = DOMESTIC, Payment Terms = NET30, etc., means every new U.S. customer starts with those defaults and only unique info (name, address, credit limit) needs entry.

Vendor Templates

Similar to customers, set up **Vendor Templates** for common vendor types. Fields to consider defaulting:

- **Vendor Posting Group** – Typically “VENDORS” (mapping to Accounts Payable account). If multiple AP accounts (rare), templates accordingly (e.g. DOMESTIC vs FOREIGN AP accounts).
- **Gen. Business Posting Group** – Might use “VENDOR” or “DOMESTIC” (mostly relevant if you use this to differentiate input tax or expense grouping; often all vendors share one group).
- **Purchaser Code** – If a procurement person is usually associated, could default.
- **Payment Terms Code** – e.g. NET30 as default payment terms you have with suppliers. If some vendors (like utilities) are always due on receipt, maybe a separate template.
- **Payment Method Code** – e.g. CHEQUE for print checks by default, or Electronic. If most vendors are paid by check in US, maybe default “CHECK”. Or if encouraging ACH, default “ACH”. Can always change per vendor.
- **Tax Liable** (Sales Tax liable on purchases) – In US, this is usually False because businesses typically provide resale or exemption certificates to vendors for items they resell, and for expenses you either accrue use tax or not. However, BC’s purchase tax calculation is often not used heavily in US (instead, companies pay vendor invoices that include sales tax and treat it as expense, or self-accrue use tax outside BC). If the client uses BC to accrue **Use Tax** on purchases, you’d set Tax Liable = TRUE on vendors where you need to calculate use tax (and assign a Tax Area Code for use tax). Otherwise, leave Tax Liable false (so system doesn’t compute tax on vendor invoices). So a “Taxable Vendor” template might be rarely used. You might have a template for “Out-of-State Vendor” if you self-assess use tax, with Tax Area = your state use tax and Tax Liable = true – but many companies handle that offline. Consult their tax approach.
- **Tax Area Code** – Only if calculating tax on purchases in-system. Often left blank or set to a default “USE-TAX” area if implementing use tax. Otherwise, not commonly set.
- **IRS 1099 Code** – If you track 1099s, you might set a default 1099 Form/Box on vendor templates. For example, a “Service Vendor” template could set 1099 Code = MISC-07 (for services) so that any new service vendor is flagged for 1099s. Or a “Corp Vendor” template might leave 1099 blank. This helps ensure you don’t forget to mark vendors for 1099 if needed.
- **Currency Code** – If you have foreign vendors, a template for them can set the Currency (e.g. CAD for Canadian vendor template).
- **Language Code** – If sending POs in another language to vendor, set if needed.
- **Shipment Method Code** – Rare for purchasing, but if you always use certain freight terms for POs by default (like a default shipping agent).
- **Location Code** – If company has multiple receiving locations and a vendor template is specific to one location’s sourcing, could set, but typically leave blank so purchasing decides per order.
- **Blocked** – Could default new vendors as Blocked=Payments or All, pending approval. But usually new vendors are active.
- **Dimensions** – If using a dimension like Department or Project to tag expenses by vendor type, you could preset. E.g. a “Subcontractor” vendor template might set Department = Production by default, etc. However, dimensions often are assigned on the transaction rather than vendor card, unless a vendor always goes to one dimension.

Item Templates

Items often need more setup, and templates are extremely useful to ensure consistency. You may create multiple item templates based on item type or product group. For instance: **Resale Item**, **Manufactured Item**, **Service Item**, **Non-Inventory Item**, etc. Fields to default:

- **Item Type** – Inventory vs Service vs Non-Inventory. For example, a “Service Item” template would set Type = Service (since it’s not a physical stock item). A “Non-Inventory” template sets Non-Inventory type for things you don’t track quantity on. Regular products would be Inventory.
- **Item Category Code** – If using item categories for grouping, a template can set this. For example, a template per item category ensures that category is assigned. Item Category can itself default some values to the item (like default UoM, posting group) if configured – but an item template can cover more.
- **Base Unit of Measure** – What UoM is the item stocked in. Many companies have a default like EACH. If so, template can set Base UoM = EA (each). You might have different templates if some items default to different UoM (like a template for liquids with GAL gallon, etc.).
- **Sales UOM / Purchase UOM** – If typically same as base, template can set them equal to Base Unit of Measure. If not, could specify if known (or leave blank to default to Base).
- **Inventory Posting Group** – Critical for inventory items. This ties the item to the correct inventory **G/L accounts** (Inventory, COGS, etc.). Often one posting group for all (e.g. “RAW” or “FIN” or just “INV”). Some companies split by product type (e.g. “RETAIL” items vs “MATERIAL” items hitting different COGS accounts). Use templates accordingly: e.g. **FG Item** template sets Posting Group = FG (finished goods), **Raw Material** template sets = RAW. If all items use same accounts, just one group (e.g. ALL) can be defaulted in all templates.
- **Gen. Product Posting Group** – This along with Gen. Bus. PG defines revenue/COGS accounts. Commonly set to e.g. “RESALE” for goods you sell, or different codes by item type if separating sales accounts (e.g. “PARTS” vs “SERVICE” revenue). Templates should set appropriate Prod. Posting Group. For example, a **Service Item** template would set Gen. Prod. Posting Group = SERVICES (so that sales of that item hit a service revenue account) while a **Resale Item** template sets it to, say, RETAIL or PRODUCT revenue. Ensure consistency with how the G/L accounts are mapped in **General Posting Setup**.
- **VAT Prod. Posting Group** – For US, this might be “TAXABLE” or “NONTAX” if using VAT groups for sales tax. Actually, BC (US) uses Tax Groups on item cards (in Tax Setup, separate from VAT Prod. Posting Group). The VAT Prod. Posting Group likely isn’t used in US locale if Sales Tax is enabled; instead, we use **Tax Group Code** on the item. So: if using sales tax, set **Tax Group Code** in templates (e.g. “TAXABLE” for most items, meaning this item is subject to sales tax) or “EXEMPT” if selling that item is usually exempt. By default, BC might consider all items Taxable unless specified. So having the template set Tax Group = TAXABLE ensures proper tax calc on sales. For non-taxable items (maybe services in some states), a different template can set a non-taxable tax group.
- **Costing Method** – For inventory items, default as configured in Inventory Setup (likely FIFO or Average). Templates can override if needed. For example, a **Manufactured Item** template might default **Standard Cost** method (because you plan to define standard costs), whereas a **Purchased Item** template might default FIFO. Decide based on how they manage costs: many US distributors use FIFO or Average for all; manufacturers often use Standard for finished goods. Create templates accordingly.

- **Base Unit Cost / Standard Cost** – Usually left blank in template (costs will be input per item).
Exception: if a Standard Cost template, you might put a dummy standard cost (like \$0 or some average) just so the field isn't blank, but likely better to leave for user to enter real cost.
- **Price/Profit fields** – Leave blank; those are item-specific.
- **Replenishment System** – If the item is usually **Purchased** or **Produced**. Templates can set **Replenishment = Purchase** for bought items (and even default a preferred Vendor No. if most items from same vendor – but that's rare; better to leave vendor blank for user to fill). For finished goods, set Replenishment = Prod. (and maybe default a Production BOM and Routing if using same BOM for many? Unlikely – those are usually unique per item). If using Assembly Management for kitting, maybe a template with Replenishment = Assembly.
- **Lead Time Calculation** – If most purchased items have e.g. 7D lead time, template can set **Lead Time = 7D**. Or set a typical manufacturing lead time on produced item template. Can save time rather than entering on each item.
- **Manufacturing Policy** – For produced items, templates might set policy to **Make-to-Stock** or **Make-to-Order** depending on typical. If majority one way, set it.
- **Flushing Method** – Template can set the item's default flushing method for components or output. E.g. a "Raw Material" template might set Flushing = Backward (if these are usually backflushed). If some components are always manual, you'd adjust item-by-item, so template can use the common scenario.
- **Lot/Serial Tracking Code** – If certain item categories are always lot or serial tracked, the template could assign a default **Item Tracking Code**. For example, a template for "Lot Tracked Item" sets Tracking Code = LOTALL (assuming that code requires lot numbers on all transactions). If most items are not tracked, default template leaves it blank (no tracking).
- **Dimensions** – If items carry default dimensions (like an Item Category dimension), you can set via template. E.g. an "Office Supplies" template might set Global Dimension 1 = ADMIN (so that revenue from those items defaults to admin department).
- **Blocked** – Usually No in template, unless you want new items to start as blocked for sales until fully set up (some companies do that). Typically, you leave new items unblocked so they can be used.
- **Variants** – If the template is for an item that will have variants (e.g. apparel), there's no direct field to pre-create variants via template, but you could indicate that multiple variants might be needed (the user would still define them after creating the item).
- **Item Template Code** – Note that BC allows assigning an "Item Template" code on customer or sales documents for quick apply, but here we're focusing on creation templates.

In BC 2023, when you click "New Item", it will ask for a template (if more than one exists) or automatically apply one if only one. After the item is created, the template can also apply **Default Dimensions** via the "Dimensions" button on the template setup ³⁴ .

Other Templates:

- **Contact Templates:** If maintaining standalone contacts (like leads or business relations separate from customers/vendors), you might have a template for Person vs Company. Fields: Type (Company/Person), perhaps default Country/Region or communication defaults. Not heavily used unless doing a lot of lead management.
- **Employee Templates:** If using Employees (for time sheets or jobs), a template could default their posting group or some HR settings. But employees typically require less accounting setup; you may skip templates or have a simple one for new employees.

- **Resource Templates:** If using Resources (in jobs or service), you might create templates for types of resources (e.g. Labor vs Equipment) to default cost/profit calculations or posting groups. E.g. a “Labor Resource” template might set Resource Type = Person and a specific **Resource Group**.
- **Bank Account Templates:** Possibly, if adding many bank accounts, a template could default the currency (like USD), Bank Posting Group, etc.

In summary, **configuration templates** are a way to encapsulate best-practice field values for each master data type. Take time to create these for any field where a default choice will apply to many records – it both speeds up data entry and reduces errors. The user can always override a template value on a specific record, but having templates apply consistent initial values helps a lot.

Once templates are set, test by creating a new record via the template to ensure all desired fields populate. For instance, create a dummy customer with the Domestic template and verify that posting groups, tax area, etc., are indeed filled in as expected. Adjust the template if something is missing.

Finally, be aware that template application can be automated during data migration (RapidStart packages can use templates to fill certain fields on import). So these templates not only assist interactive user entry but also bulk imports of master data.

Using Templates in BC:

- When adding a new customer/vendor/item, the system will ask to choose a template (if one exists) ³³. If only one template exists, it may auto-apply it ³².
- You can maintain templates via the **Customer Templates** page (same for Vendor, Item, etc.). You can also create a template from an existing record by the action “Save as Template” (which is handy: fill one record properly, then save as template to reuse its setup).
- Templates also allow copying dimensions as noted. After applying a template, you can still modify the new record's fields as needed.

Template Example:

For clarity, here's an example **Customer Template** called **DOMESTIC**:

- Code: DOMESTIC, Description: Domestic Customers
- Customer Posting Group = DOMESTIC (maps to standard A/R account)
- Gen. Bus. Posting Group = DOMESTIC (for tax/revenue mapping)
- Tax Liable = Yes
- Tax Area Code = NY (assuming company based in New York; this tax area has NY state tax %)
- Payment Terms = 30D (Net 30 days)
- Payment Method = CHECK
- 1099 Code = (blank, as usually customers aren't 1099 – that's for vendors)
- Fin. Charge Terms = STD (if standard terms for late fees are set)
- Salesperson Code = JSMITH (could assign default salesperson)
- Dimension Dept = SALES (meaning revenue from these customers defaults to Sales dept)
- **Result:** When this template is applied to a new customer, all above fields fill in. The user then just enters customer name, address, maybe specific Tax Area if not NY, and credit limit. This ensures

every new customer has the needed setup to correctly post sales (to the right accounts, with tax calculation on, etc.) without the user having to remember to set each field.

In conclusion, define configuration templates to reflect the common scenarios in the client's business. It's better to have a few extra templates than to have users manually toggling fields incorrectly. Templates can be updated later; changes won't affect already-created records (they're just a starting point), but new records will get the updated values.

Sources:

- The concept of default posting groups and their effect is detailed in Microsoft's docs.
- Credit warning options for customers are described in official guidance.
- Automatic cost posting and adjustment recommendations are per Microsoft's best practices.
- Template usage is highlighted in the BC Training material, which suggests how templates save time in data entry ³² ³³ .
- We also refer to built-in tooltips and experiences in the BC UI for many of these fields.

¹ ² ³ ⁴ ⁵ ⁶ ⁷ ⁸ ⁹ ¹⁰ ¹¹ ¹² ¹⁴ ¹⁵ ¹⁶ ¹⁷ ¹⁸ ¹⁹ ²⁰ ²¹ ²⁴ Table "Purchases & Payables Setup" | Microsoft Learn

<https://learn.microsoft.com/en-us/dynamics365/business-central/application/base-application/table/microsoft.purchases.setup.purchases-&-payables-setup>

¹³ Viewing Purchase Orders after posting and received

<https://community.dynamics.com/forums/thread/details/?threadid=225dd8a1-c0bf-4bbc-8e08-db0bd1c70edf>

²² ²³ Table "Sales & Receivables Setup" | Microsoft Learn

<https://learn.microsoft.com/en-us/dynamics365/business-central/application/base-application/table/microsoft.sales.setup.sales-&-receivables-setup>

²⁵ ²⁶ ²⁷ ²⁸ ²⁹ Table "Warehouse Setup" | Microsoft Learn

<https://learn.microsoft.com/en-us/dynamics365/business-central/application/base-application/table/microsoft.warehouse.setup.warehouse-setup>

³⁰ Managing Fixed Assets in Dynamics NAV - The NAV People

<https://www.the365people.com/blog/fixed-assets-in-dynamics-nav>

³¹ ³² ³³ ³⁴ Dynamics 365 Business Central: Do more with Customer and Vendor Templates – DvlprLife.com

<https://www.dvlprlife.com/2022/08/apply-those-master-templates/>