# Dynamics 365 Business Central Setup – Non‑Table Tasks

## Step 1 – Company Setup & Core Settings

* Add users to Business Central and assign appropriate permission sets / user groups.
* Upload company logo image for document layouts (Company Information → Picture).
* Configure SMTP / Microsoft 365 email account using the 'Set up Email' assisted setup.
* Review and assign printers or cloud printer mappings in Printer Management.
* Run 'Get Started' checklist to mark completed items and expose pending ones.

## Step 2 – Core Financial Configuration

* Design and approve the final Chart of Accounts structure outside BC (excel template) before import.
* Create fiscal year periods via 'Create Year' and close historical periods as required.
* Set up automatic exchange‑rate service connection (Currency Exchange Rate Services).
* Decide on audit‑trail settings (change log) and enable tables/fields for tracking.
* Define and schedule recurring jobs like 'Post Inventory Cost to G/L' and 'Adjust Cost – Item Entries'.

## Step 3 – Sales, Purchasing & Tax

* Complete U.S. Sales‑Tax Wizard or integrate external tax provider (e.g., Avalara).
* Create workflow(s) for sales or purchase document approval where management sign‑off is required.
* Configure document layouts / custom Word reports for quotes, orders, invoices, checks.
* Set up electronic payments (ACH) using AMC Banking extension and export profiles.
* Import or create standard price lists / discounts if complex pricing is needed.

## Step 4 – Inventory & Warehouse

* Decide physical inventory procedures and prepare count sheets before loading opening stock.
* Configure item tracking codes (lot/serial) and test with sample transactions.
* Define warehouse bins and zones (if using directed pick/put‑away) in advanced warehouse module.
* Establish replenishment policies and safety‑stock levels to drive planning worksheets.
* Train warehouse staff on BC mobile device or document processes if using scanning.

## Step 5 – Optional Modules

* Run Fixed‑Asset depreciation books periodic job and verify GL integration.
* Set up Job WIP calculation method and test 'Calculate WIP' followed by 'Post WIP to G/L'.
* Create service management parameters (service order statuses, contract templates).
* Configure manufacturing routing and BOM certifications (if using MFG module).
* Enable Cash Flow Forecast and define cash‑flow accounts for Power BI reporting.

## Step 6 – Data Migration & Validation

* Prepare cleansed Excel data files and use Configuration Packages to import master data.
* Import opening balances via General Journal or assisted 'Import Opening Balances' wizard.
* Run data validation reports to identify missing posting groups, dimensions, or tax areas.
* Set up sandbox / test company, restore production copy, and perform full acceptance testing.

## Step 7 – Testing, Training & Go‑Live

* Execute conference‑room pilot scenarios covering order‑to‑cash and procure‑to‑pay flows.
* Develop end‑user training materials and conduct classroom or remote sessions.
* Prepare cut‑over checklist (final stock counts, AP/AR open items, bank reconciliations).
* Plan go‑live support schedule and escalation path with partner / internal IT.
* Lock prior fiscal periods and update 'Allow Posting From/To' once live.