



Njoo Tuinue viwango!

July 24-25, 2025 | Nairobi, Kenya

EAST AFRICA



EAST AFRICA

Richard Obiero (CPA, MCP, MS)

Standard MS Business Central & When to Customize





Standard Business Central & When to customize

Open Insights on how to exhaust Standard BC and
when to customize if really *really reallllly* needed!















Agenda

- What is BC customization?
- How does Project management strategy choice impact the extent of customization?
- Can Choice of implementation methodology reduce customization?
- How to maximize on Standard BC – different use of standard BC modules?
- Customization points and indications.
- Managing Customizations to a minimum.
- Question and Answer.



Dynamics 365 Business Central Capabilities

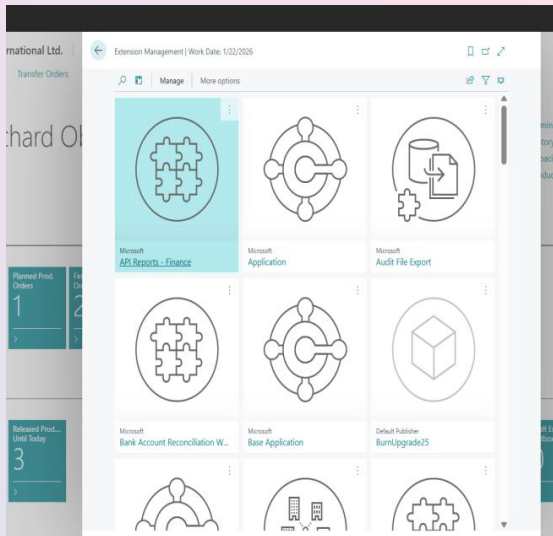
Version 26 Year 2025 April Release

 Finance and Accounting <ul style="list-style-type: none">• General Ledger• Unlimited Dimensions• Multiple currencies• Multiple companies	<ul style="list-style-type: none">• Budgets• Financial reporting• Consolidation• Intercompany postings• Statistical accounts	<ul style="list-style-type: none">• Cash flow forecast• Fixed assets• Cost accounting• Deferrals• Electronic payments/direct debits	<ul style="list-style-type: none">• Customer payment process• Late payment prediction• Bank account reconciliation• Bank account management• Check writing
 Sales and marketing <ul style="list-style-type: none">• Marketing text suggestions• Contact management• Campaign management• Interaction and email logging• Opportunity management• Dynamics 365 Sales integration	 Fulfillment and delivery <ul style="list-style-type: none">• Sales invoicing• Sales order management• Sales line and invoice discounting• Campaign pricing• Returns and exchanges• Dynamics 365 Customer Service integration	 Purchasing and payables <ul style="list-style-type: none">• Purchase invoicing• Purchase order management• Purchase return order management• Alternative order addresses• Purchase invoice discounts	
 Inventory <ul style="list-style-type: none">• Inventory control• Item categories and attributes• Item tracking• Multiple locations• Location transfers	 Supply planning and availability <ul style="list-style-type: none">• Supply planning• Demand forecasting• Sales and inventory forecasting• Order promising• Calendars	 Project management <ul style="list-style-type: none">• Basic resources• Capacity management• Multiple costs• Projects• Time sheets	
 Service management* <ul style="list-style-type: none">• Planning and dispatching• Service contract management• Service item management• Service order management• Service price management• Dynamics 365 Field Service integration	 Warehouse management <ul style="list-style-type: none">• Bin Tracking• Inventory picks and put-aways• Warehouse receipt• Warehouse shipment	 Manufacturing* <ul style="list-style-type: none">• Assembly management• Standard cost worksheet• Production bill of materials• Basic capacity planning• Machine centers• Version management	

*Available in Dynamics 365 Business Central Premium AI/Copilot in Business Central features



What is Customization

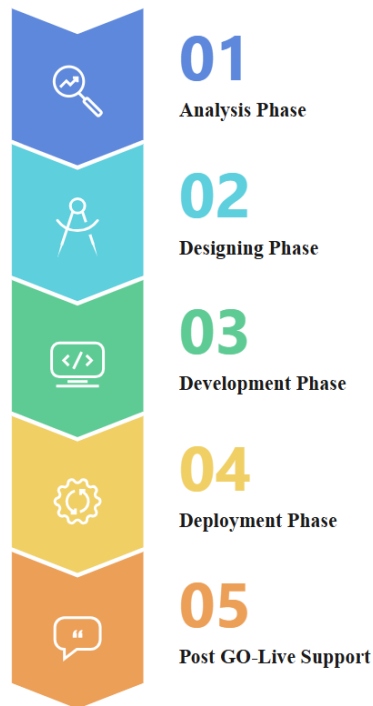


- Customization is introduction through development of new functions or features not found in the base application and does not break the base application processes.
- Customization and configuration is very different.
- Configuration Is the setup process and utilization of different modules in BC to achieve and produce the desired or documented business process for the client.
- Hence Know when to configure and when to customize – configure more, customize less.



How does Project management strategy choice impact the extent of customization

Key stages of the Sure Step methodology:

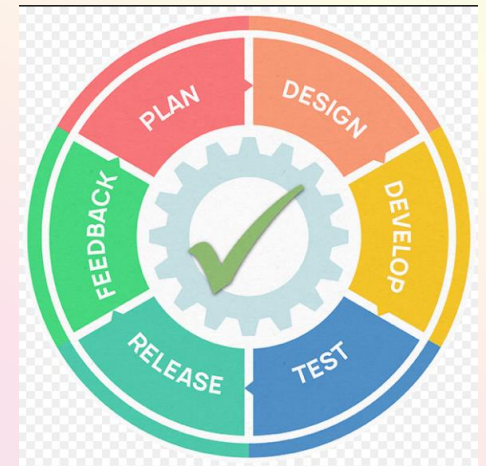


- While aligning on key concept for strategy choice ensure to pick and know the key Decision makers, Process owners, separate already documented process vs the actual process
- Spend more time with the process drivers than with decision makers, often you will find what is stated is not the daily happenings.
- Adoption of Sure step approach for MS business central deployment;
- Importance of project charter – (project governing rule book).
- Analysis phase has tools and templates that are key guide on how much customization will be there;
 - Business and User requirements questionnaire.
 - Business and User Requirement specification.
 - FitGap Analysis Documentation.
 - Prioritization and Risk tracking
- The above will help document;
 - Key pain points that set the need to acquire a system
 - Success metrics of the deployment



Can Choice of implementation methodology reduce customization

- Implementation methodology will dictate how much you customize vs configure;
- Agile Methodology – iterative development and flexibility – quite effective on reducing customization.
- Rapid implementation approach by using preconfigured tools that are set to streamline the process and minimize need for customization.
- Hybrid methodology give you the best of both world(waterfall & Agile).
- Let the customer in on the journey of implementation with the best methodology.
- Do not shy to engage experienced partners – to do QC before you start Dev (More collaboration better results).





How to maximize on Standard BC – different use of standard BC modules- Highlights

- Key to successful deployment rest with the Project lead detailed knowledge of BC and willingness to consult on processes prior to go ahead for customization.
- Learn the MS Environment; Business data and process tools, Low code automation, Insights and analytics, Productivity and collaboration, Azure and Open AI
- Let's have a look at most underutilized features or functions;
 - Finance charge memo – can be setup for Loan management
 - Task – Ticketing system
 - Fixed Asset –Fixed Asset Tracker
 - Jobs/projects module

Do not have a fixed, traditional basic view of BC! It will cost you!





Customization points and Indications

- Understanding the client's industry standards(will require integration(Gaps in standard functionality));
 - Government regulations e.g. e-tims, Data privacy policy, Revenue Authority systems
 - Mobile money.
 - Best practices promoted by the industry.
 - Compliance with international Bodies.
 - Unique business processes, the fabric of the business
 - Data privacy and compliance
- Above is key since its not just the company business processes you automate but also automation is meant to elevate and make the business competitive.

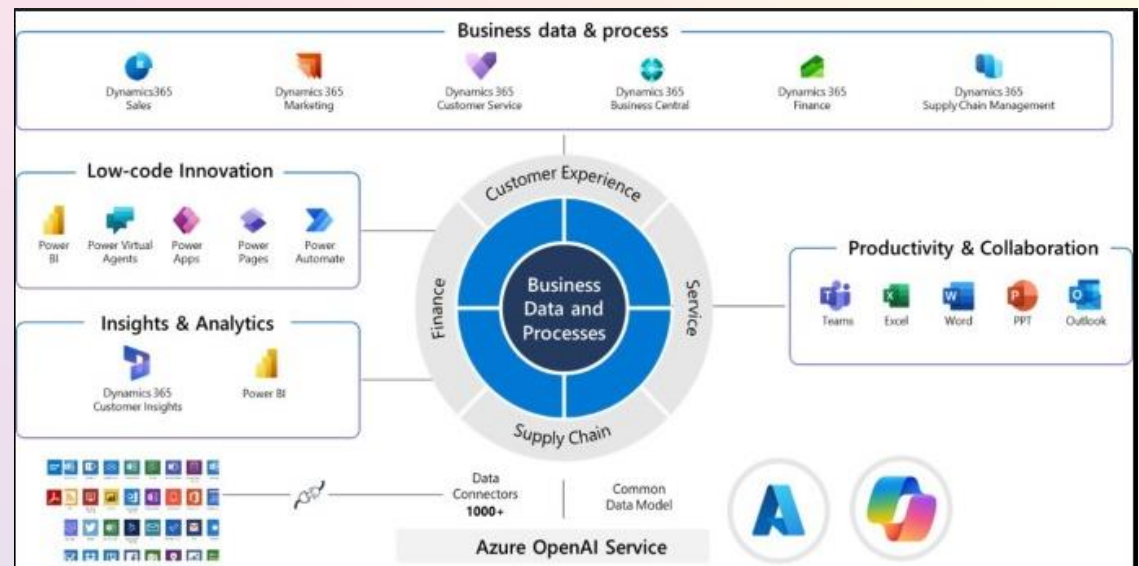
Always the goal is to give a world class with Business central





Managing Customizations to a minimum

- Understanding tools availed by Microsoft in one environment – Power automate, power apps, BI, Excel AI,
- Strict Adherence to project charter.
- Understanding the scope of implementation.
- Quality documentation and quality assurance on documentation before approval.
- Managing the ever imagining and inventing user or customer(Do not manage by customizing).
- Staying to date with New released versions
- The Role and Power of a good Quality assurance and control in project delivery.
- A good Quality Assurance and control role should be full of BC knowledge latest release and trend – in this way the aim is always to achieve most with the Std BC.
- And when customizations are done, they are at the standard approved by Microsoft to allow for publishing - according to Universal code initiative.



IT CANNOT JUST BE BC AND EVRYTHING TO FIT THERE! –
You may need 365 marketing and not customize





Question and Answer

Interactions and questions from the Audience



EAST AFRICA

Contact ;

Richard Obiero - 0726609121

Email; richardobiero@outlook.com

Be on the look out for an event just
for deep dive and error resolution on
Inventory, Warehouse,
Manufacturing modules - soon

