



MB-800 Exam Preparation

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Topics

- Introduction
- Setup Business Central
- Configure financials
- Configure sales and purchasing
- Perform Business Central operations

Introducing

- Name
- Company
- Role
- Experience on NAV, Business Central, other ERPs

Who am I

- Marco Ferrari
 - Started in 1997 in Navision Software Italy
 - Localization of Navision Financials, Attain...etc
 - Trainer for Italian partners
 - Since 2000
 - Supply Chain/Manufacturing consultant
 - Developer
 - Trainer
 - MCT since 2004



Setup Business Central

Setup of Business Central

- Create and configure a new company
- Manage security
- Setup core app functionality
- Setup dimensions
- Setup and manage approvals by using workflows

Create and configure a new
company

Create and configure a new company

- Create a new company in the on-premises and cloud-based versions of Business Central
- Create a new company from scratch by using Assisted Setup to copy data from an existing company
- Describe the use cases and capabilities of RapidStart Services
- Create a configuration worksheet
- Create and export a configuration package
- Import and apply a configuration package
- Create journal opening balances

Create new company – Cloud version

Settings

Dynamics 365 Business Central

- Personalize
- My Settings**
- Company information
- Assisted setup
- Advanced settings

Edit - My Settings

Role	Sales Order Processor	...
Company	CRONUS IT	...
Work Date	01/04/2020	📅

Allowed Companies

✕ Reminder: your work date is 01/04/2020 Use today | Change to... | Turn off reminder

🔍 Search **New** 📄 Open in Excel

Create New Company

→ CRONUS.IT ⋮ ☑ Completed

Create a new company

- Empty company
 - Start from scratch
- Company with setup data
 - For companies having standard process
 - Chart of accounts
 - Payment methods

Use of RapidStart Services

- Configure an add-on solution
- Prepare a demo
- Mass deployment
- Switching from trial to production
- Configure a subsidiary

RapidStart Services

- Configuration Worksheet
- Configuration Packages
- Configuration Questionnaires
- Configuration Templates

RapidStart steps

Create a
configuration
worksheet

Insert tables

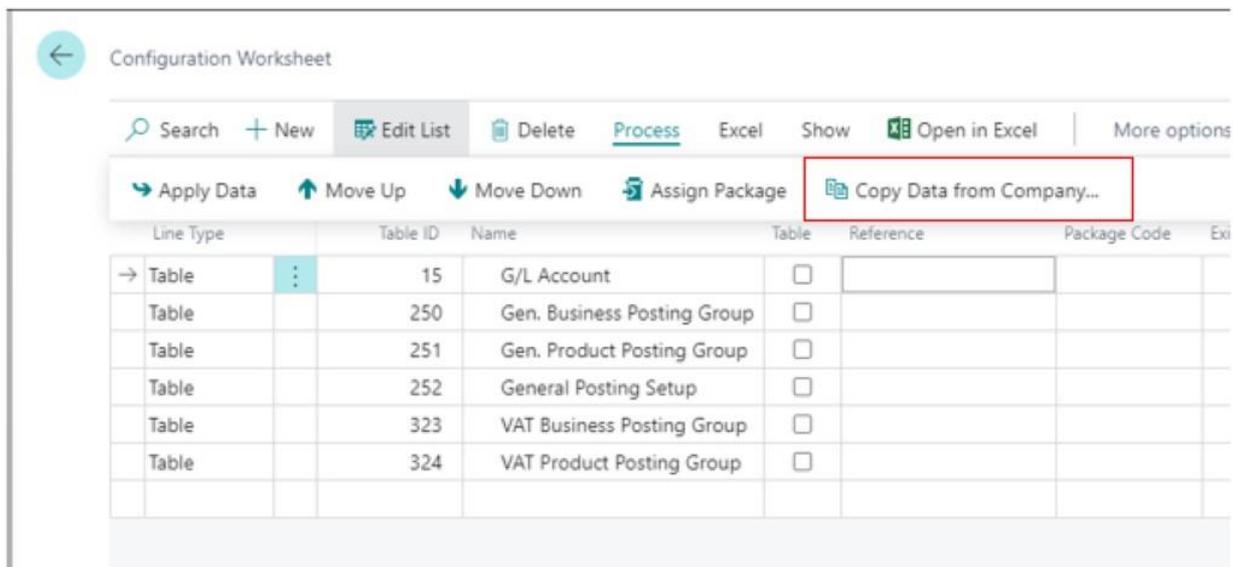
Assign
configuration
packages

Export the
package

Apply package

Copy selected data from a company

- Use the Configuration Worksheet
 - Select tables you want to copy
 - Press Copy Data from Company



The screenshot shows the 'Configuration Worksheet' interface. At the top, there is a navigation bar with a back arrow and the title 'Configuration Worksheet'. Below this is a toolbar with several icons and labels: Search, + New, Edit List, Delete, Process, Excel, Show, Open in Excel, and More options. A secondary toolbar contains icons for Apply Data, Move Up, Move Down, Assign Package, and Copy Data from Company... The 'Copy Data from Company...' option is highlighted with a red rectangle. Below the toolbars is a table with the following columns: Line Type, Table ID, Name, Table, Reference, Package Code, and Exi.

Line Type	Table ID	Name	Table	Reference	Package Code	Exi
→ Table	15	G/L Account	<input type="checkbox"/>			
Table	250	Gen. Business Posting Group	<input type="checkbox"/>			
Table	251	Gen. Product Posting Group	<input type="checkbox"/>			
Table	252	General Posting Setup	<input type="checkbox"/>			
Table	323	VAT Business Posting Group	<input type="checkbox"/>			
Table	324	VAT Product Posting Group	<input type="checkbox"/>			

Import from Excel

- Select Assisted Setup, Migrate business data, then Download Template

Name	Completed	Help	Video	Description
Set up your company	<input type="checkbox"/>	–	–	
Set up exchange rates	<input type="checkbox"/>	Read	Watch	Set up exchange rates
Set up my company	<input type="checkbox"/>	Read	–	Tell us some basic information about y...
Set up VAT	<input type="checkbox"/>	Read	–	
Update users from Office	<input type="checkbox"/>	–	–	
Get ready for the first invoice	<input type="checkbox"/>	–	–	
Set up email	<input type="checkbox"/>	Read	–	Set up email accounts that you use to ...
Customize document layouts	<input type="checkbox"/>	Read	–	Make invoices and other documents lo...
Report on financial health	<input type="checkbox"/>	–	–	
Set up reporting data	<input type="checkbox"/>	Read	–	Create data sets that you can use for b...
Get ready for business	<input type="checkbox"/>	–	–	
Set up payment services	<input type="checkbox"/>	Read	–	Connect to a payment services so that ...
Migrate business data	<input type="checkbox"/>	Read	Watch	Import existing data to Business Centra...
Connect with other systems	<input type="checkbox"/>	–	–	

Data Migration

Instructions

To prepare the data for migration, follow these steps:

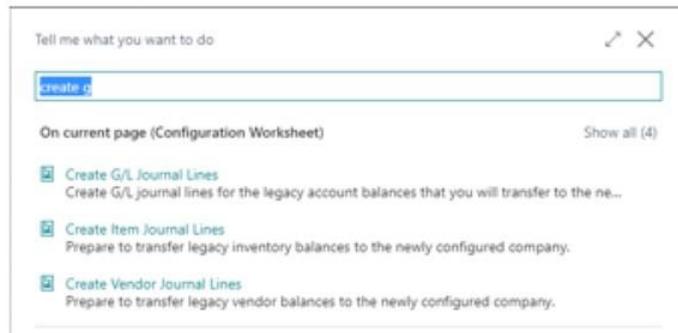
- 1) Download the Excel template.
- 2) Fill in the template with your data.
- 3) Optional, but important: Specify import settings. These help ensure that you can use your data right away.
- 4) Choose Next to upload your data file.

Settings

You can change the import settings for this data source by choosing Settings in the actions below.

Import opening balances

- Never into the Ledger tables
- Import in Journal then post
 - Gen. Journal Line (81) for G/L, customers, vendors
 - Item Journal Line (83) for Item inventory balances
- You can use **Create G/L Journal Line**, **Create Item Journal Lines**, etc procedures



Create Item Journal Lines

Create Item Journal Lines

Options

Entry Type: Positive Adjmt.

Document No.: INIT2021

Posting Date: 01/01/2021

Document Date: 01/01/2021

Journal Template: ITEM

Batch Name: DEFAULT

Standard Item Journal:

Filter: Item

× No.:

× Statistics Group:

× Vendor No.:

× Blocked:

+ Filter...

Filter totals by:

Schedule... **OK** Cancel

Item Journals | Work Date: 26/01/2023

Batch Name: DEFAULT

Manage Process Post/Print Line Item Open in Excel More options

	Posting Date	Entry Type	Document No.	Item No.	Description	Location Code	Quantity	Unit of Measure
→	01/01/2021	Positive Adj...	INIT2021	1000	Bicycle		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1001	Touring Bicycle		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1100	Front Wheel		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1110	Rim		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1120	Spokes		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1150	Front Hub		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1151	Axle Front Wheel		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1155	Socket Front		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1160	Tire		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1170	Tube		0	PCS
	01/01/2021	Positive Adj...	INIT2021	1200	Back Wheel		0	PCS

Manage security

Manage security

- Create and manage user profiles
- Setup a new user and user groups
- Create and assign permission sets and permissions
- Apply security filters

New users - Cloud

- Users must be added in the Admin Center of Microsoft 365
- Assign the Dynamics 365 Business Central license
- In Business Central select Get Users from Microsoft 365 action

Recording the actions

- To get the proper permissions you can record the activities starting from the Permission page

Permissions | Work Date: 26/01/2023

Search + New Edit List Delete Select Permission Set **Start** Stop ...

General

Permission Set MYPERMISSION Add Read Permission to...

Show Only In Permission Set Copied from System Pe...

Object Type	Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Ex
→ Table Data	0	All objects of type Table Data	Yes	Yes	Yes	Yes	

Effective permissions

- To get an overview of all the permissions you can use the **Effective Permission** action

The screenshot shows a software interface for managing users. At the top, there is a breadcrumb trail: "Users | Work Date: 26/01/2023". Below this is a toolbar with various actions: "Users: All", "Search", "+ New", "Edit List", "Delete", "Edit", "View", "Process", and "Navigate". A secondary toolbar contains "User Groups", "Permissions", "User Setup", "Printer Selections", "Warehouse Employees", and "FA Journal !". The "Permissions" menu is open, showing a list of actions: "Effective Permissions", "Permission Sets", "Permission Set by User", and "Permission Set by User Group". The "Effective Permissions" option is highlighted with a red box. In the background, a table is partially visible with a header row containing "ADMIN" and "Enabled".

Security filters

Permission Set ✎ 🔍 + 🗑️ ✓ Saved 🔍 🗑️

MYPERMISSION (Tenant)

[View all permissions](#) | [Actions](#) ▾ | [Fewer options](#)

General

Permission Set: MYPERMISSION Name: My Permission Set

Permissions | Manage 🔍 🗑️

Type	Object Type	Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
→ Include	Table Data	27	Item	Yes	Yes	Yes	Yes	-	<input type="text" value="..."/>

Edit - Table Filter - Item

🔍 Search + New 🔧 Edit List 🗑️ Delete 🔍 ☰

	Field Number		Field Caption	Field Filter
→	22	⋮	Unit Cost	<500

Customize pages for a single role

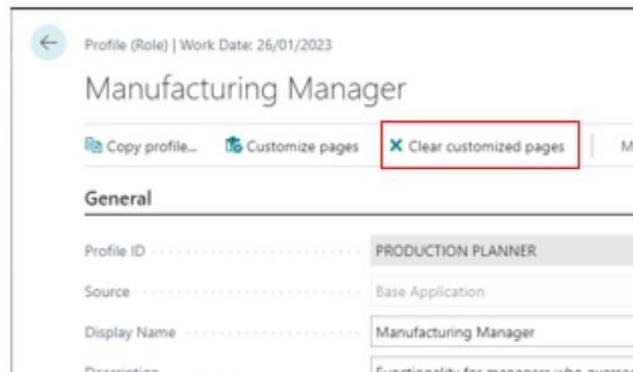
← Profiles (Roles) | Work Date: 26/01/2023

Profiles (Roles): All ▾ | 🔍 Search + New Manage Use as default profile Copy profile... **Customize pages** Export Profiles Import Profile

Profile ID	Display Name ↑	Source
SHIPPING AND RECEIVING	Inventory Manager	Base Application
IT MANAGER	IT Manager	Base Application
MACHINE OPERATOR	Machine Operator - Manufacturing Comprehensive	Base Application
<u>MANUFACTURING</u>	Manufacturing	Base Application
PRODUCTION PLANNER	Manufacturing Manager	Base Application
O365 SALES	O365 Sales Activities	Base Application
OUTBOUND TECHNICIAN	Outbound Technician - Customer Service	Base Application
ACCOUNTING SERVICES	Outsourced Accounting Manager	Base Application

Customize pages for a single role

- All pages (eg. Customer List, Item Card etc) are customized just for users associated to that profile
- All the other users see the standard page
- To clear all the customizations select **Clear customized pages**



Profiles

- View the profile into the Role Explorer, Explore All feature
- Copy a profile
- Export/Import a profile in XML
 - Use the same profile in another database

Setup core app functionality

Setup core app functionality

- Setup company information
- Setup printers for on-premises and cloud-based installations
- Setup report selections
- Setup and use job queues
- Setup email
- Setup number series

Email

Email Accounts

Search New Home Navigate

+ Add an email account

Name ↑ Address

Set Up Email

⚙️

Use caution when adding email accounts. Depending on your setup, accounts can be available to all users.

Specify the type of email account to add

Account Type ↑	Details
→  Microsoft 365	Use Microsoft 365 shared mailboxes.
 Current User	Users send emails from their sign-in account.
 SMTP	Use SMTP to send emails.

Cancel Back Next

Setup dimensions

Setup dimensions

- Setup dimensions and dimension values
- Setup global dimensions and shortcut dimensions
- Setup default dimension for a single account and for multiple accounts
- Setup default dimensions for an account type or location
- Block combinations of dimensions or dimension values

Dimension conflicts on documents

		Document Header			
Dimension Value Posting Option		Blank	Code Mandatory	Same Code	No Code
Document Line	Blank				
	Code Mandatory				Always
	Same Code			Different values	Always
	No Code		Always	Always	

Dimension conflicts on journals

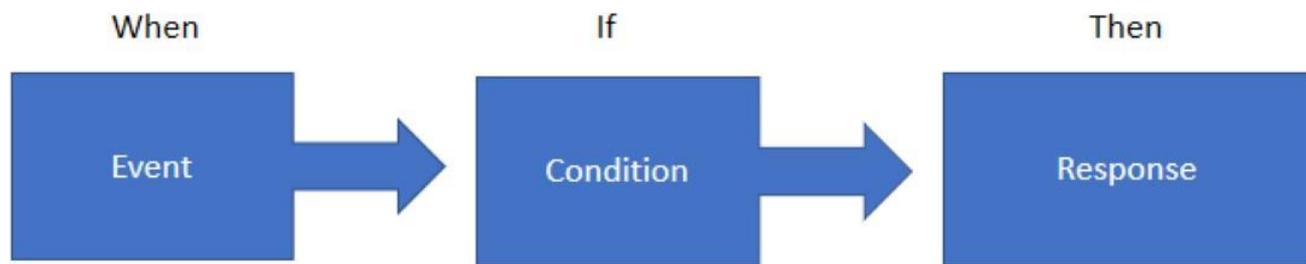
		Account			
		Blank	Code Mandatory	Same Code	No Code
Balance Account	Blank				
	Code Mandatory				Always
	Same Code			Different values	Always
	No Code		Always	Always	

Setup and manage approvals by
using workflows

Setup and manage approvals by using workflows

- Setup a purchase document approval system
- Setup a sales document approval system
- Setup document approvals
- Setup a notification system
- Setup an approval hierarchy

Workflow structure



Example

