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

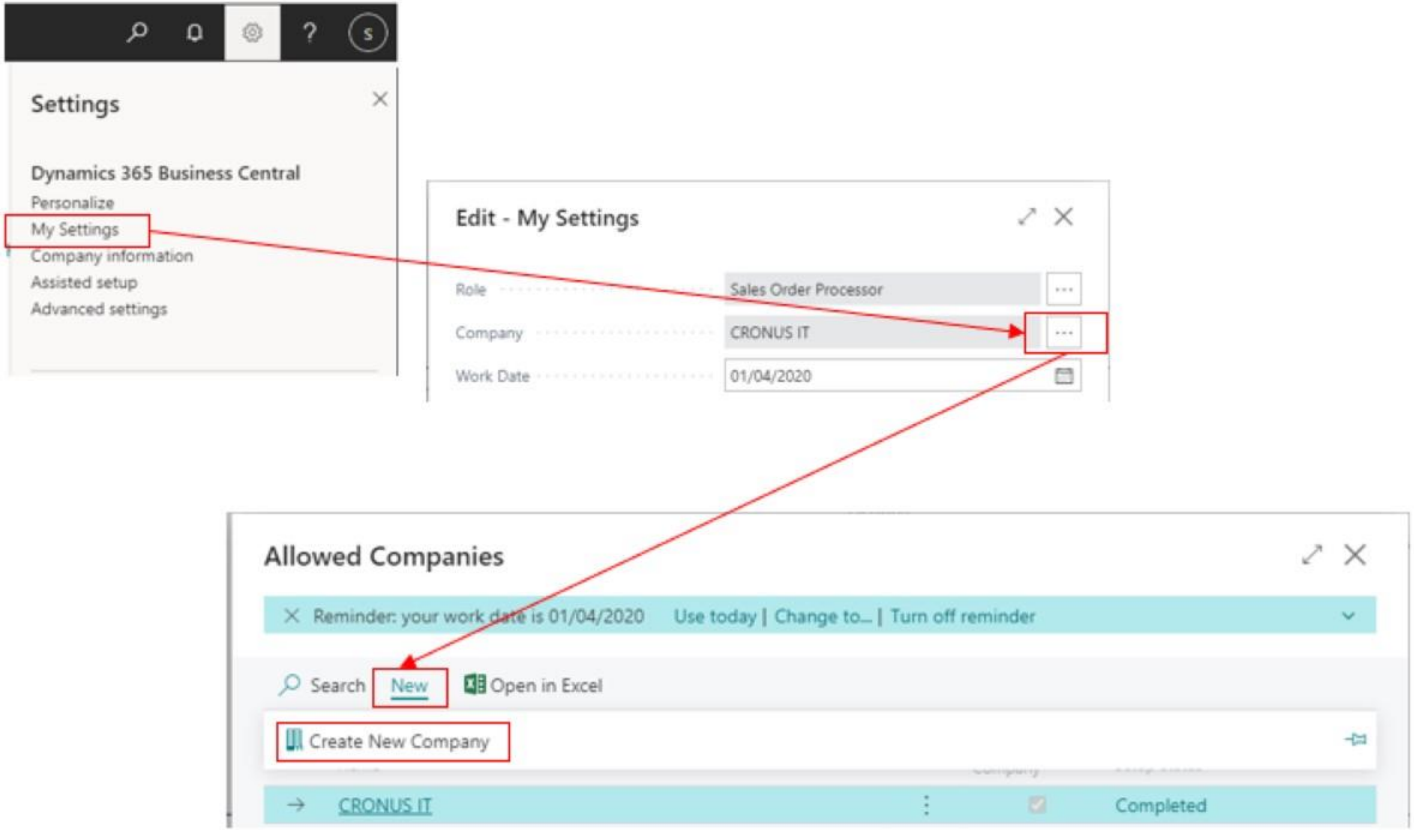
- Create and configure a new company
- Manage security
- Setup core app functionality
- Setup dimensions
- Setup and manage approvals by using workflows

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



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

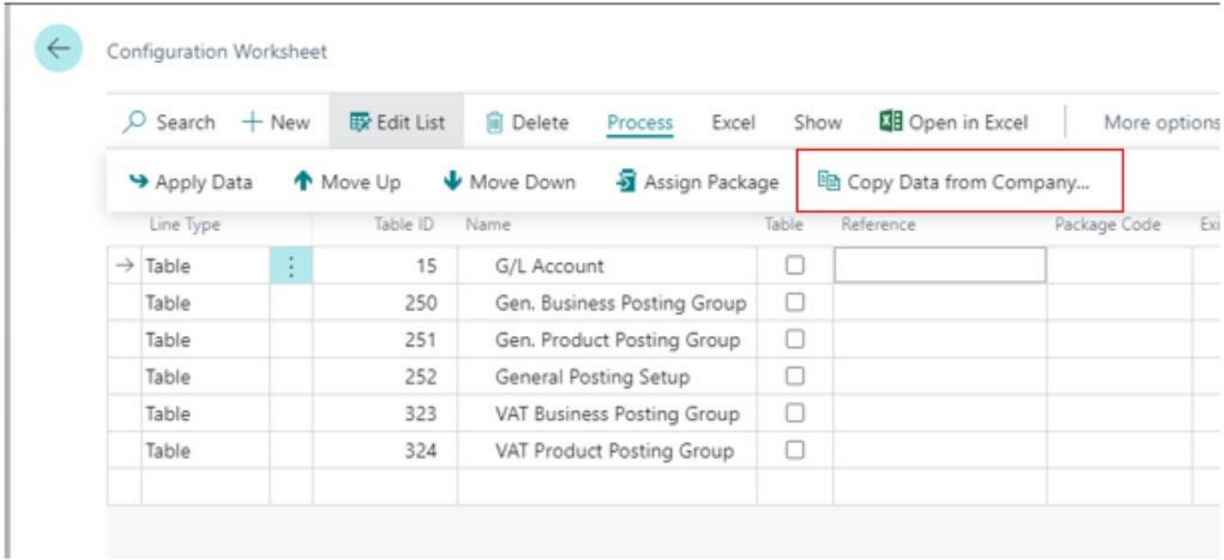
- Configuration Worksheet
- Configuration Packages
- Configuration Questionnaires
- Configuration Templates

RapidStart steps

- Create a configuration worksheet
- Insert tables
- Assign configuration packages
- Export the package
- Apply package

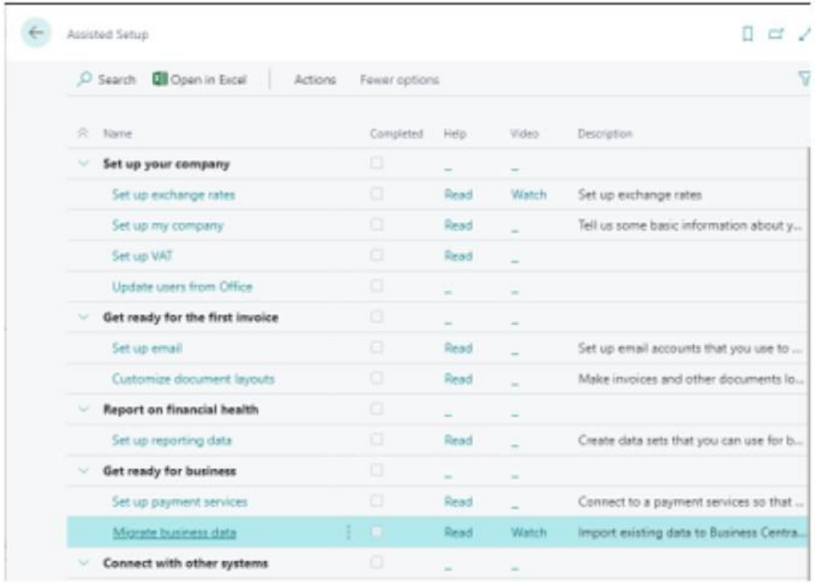
Copy selected data from a company

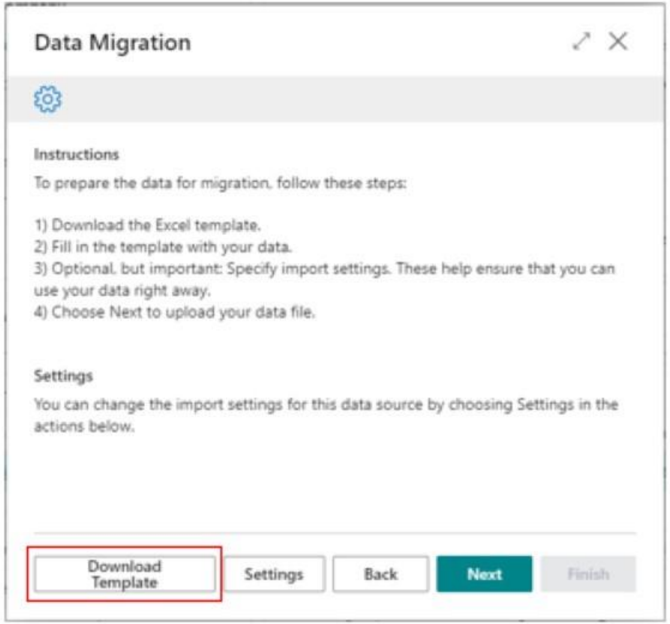
- Use the **Configuration Worksheet**
  - Select tables you want to copy
  - Press **Copy Data from Company**



Import from Excel

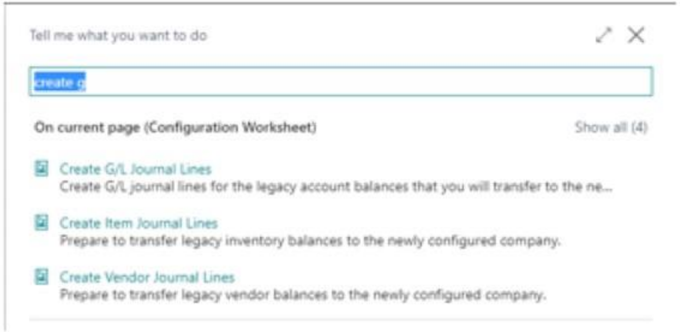
- Select Assisted Setup, Migrate business data, then Download Template



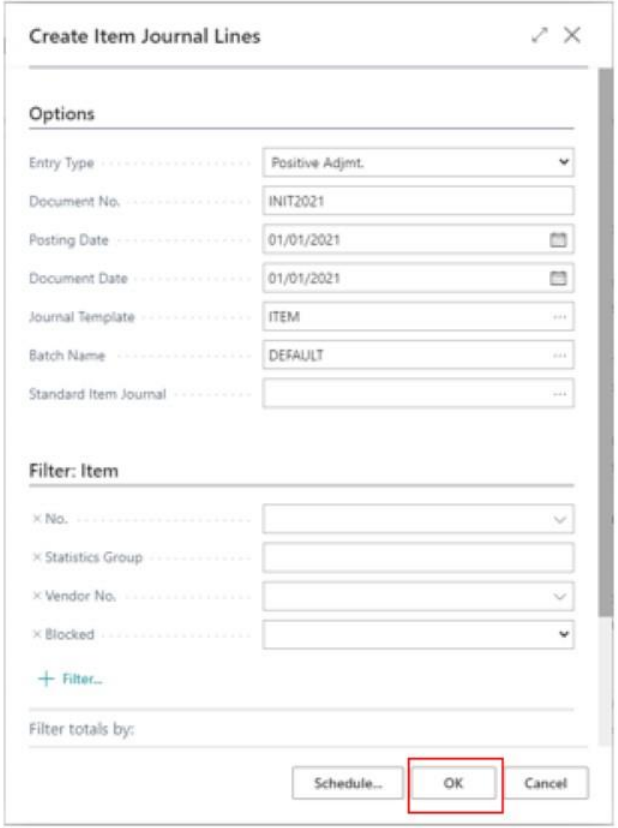


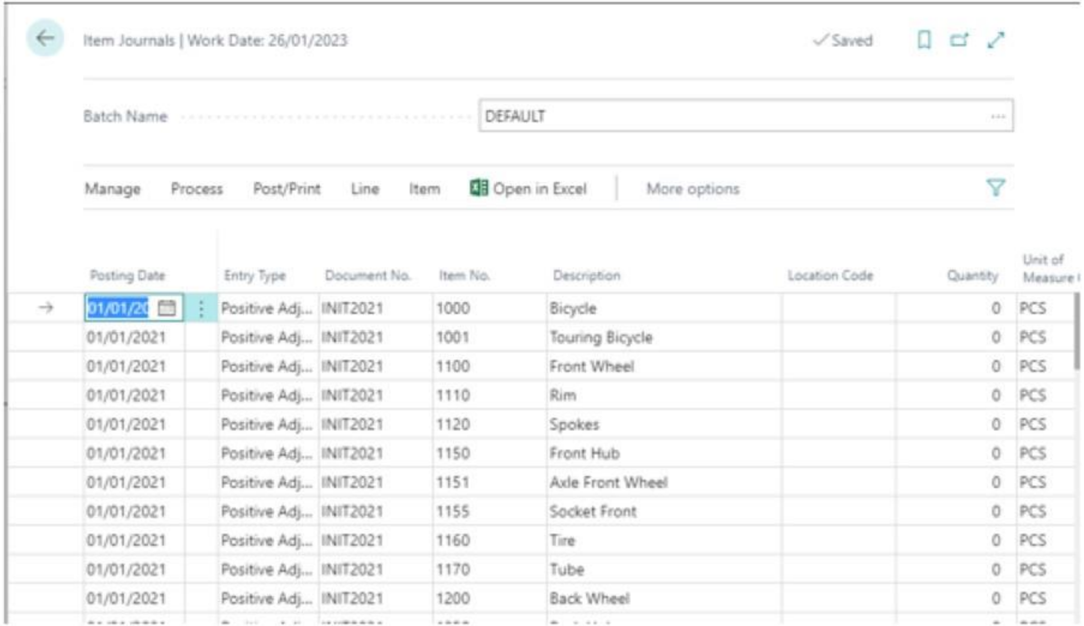
Import opening balances

- 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





Posting Date	Entry Type	Document No.	Item No.	Description	Location Code	Quantity	Unit of Measure
01/01/20	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

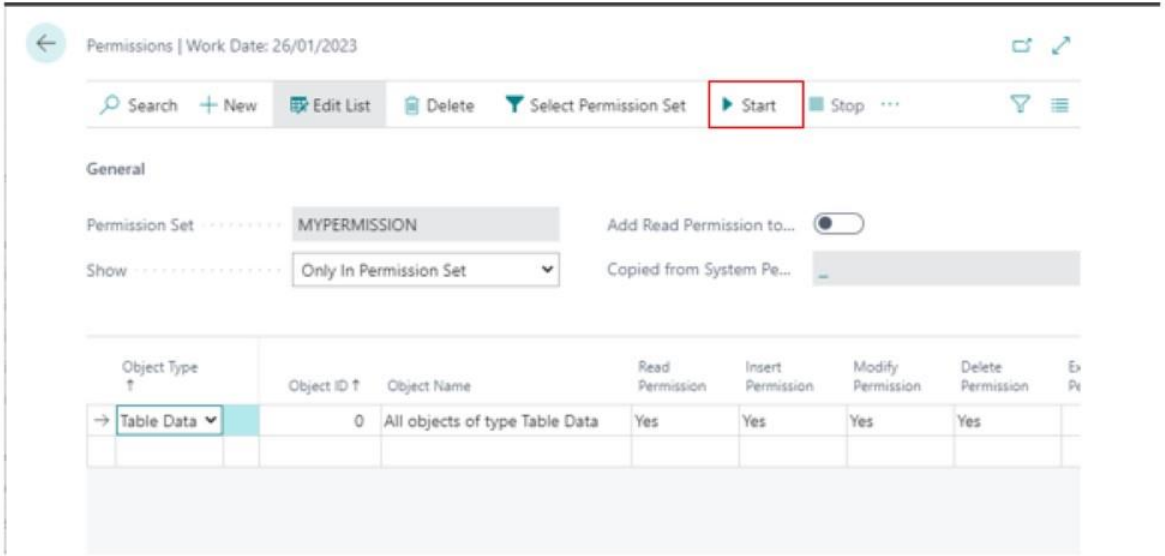
- Create and manage user profiles
- Setup a new user and user groups
- Create and assign permission sets and permissions
- Apply security filters

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

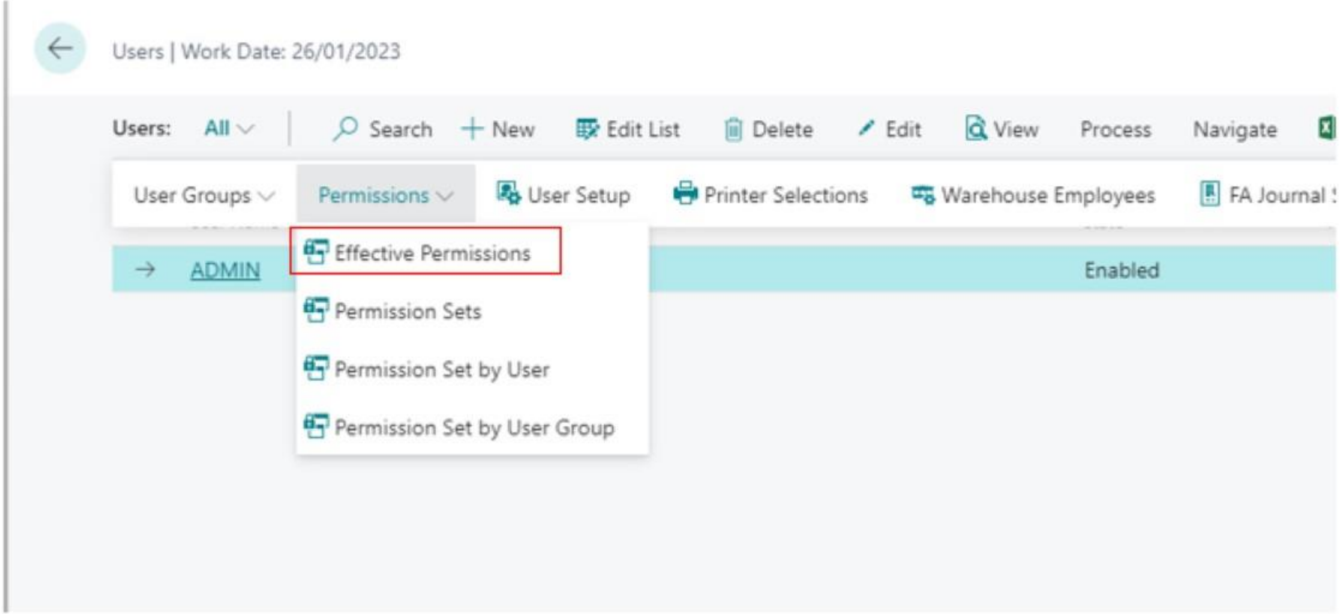
Recording the actions

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

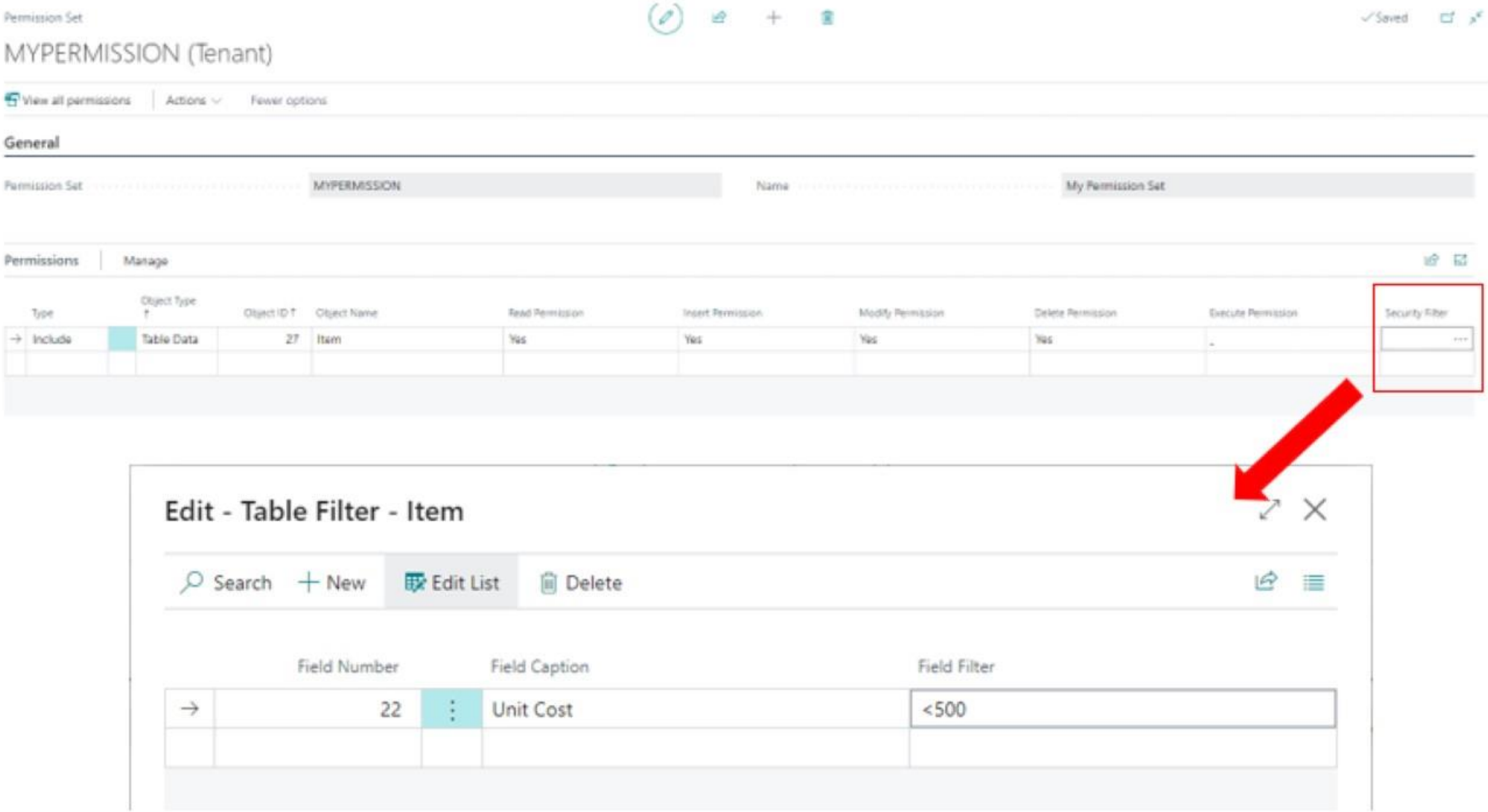


Effective permissions

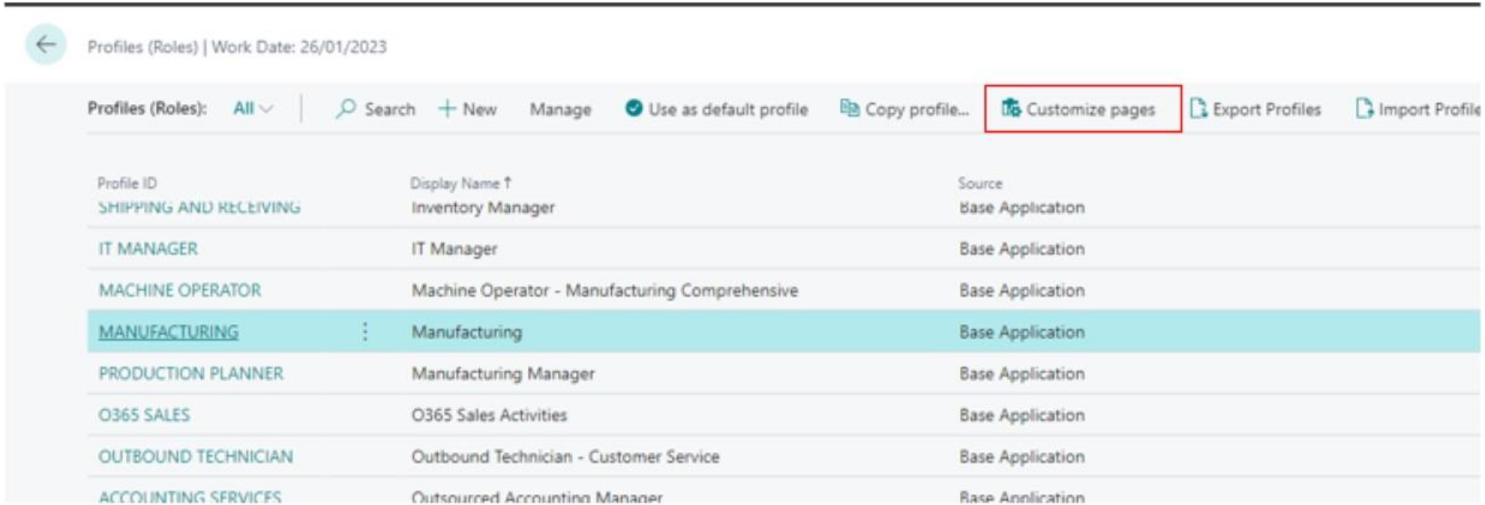
- To get an overview of all the permissions you can use the **Effective Permission** action



Security filters

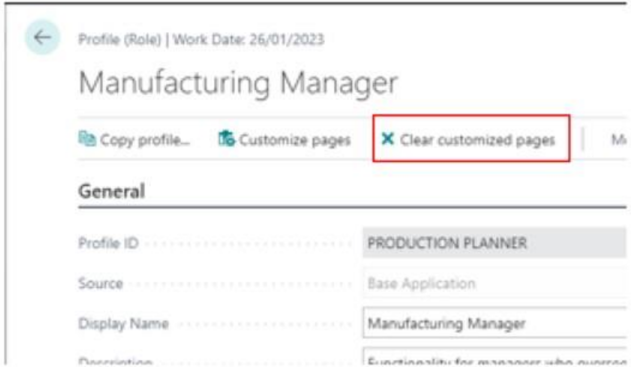


Customize pages for a single role



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

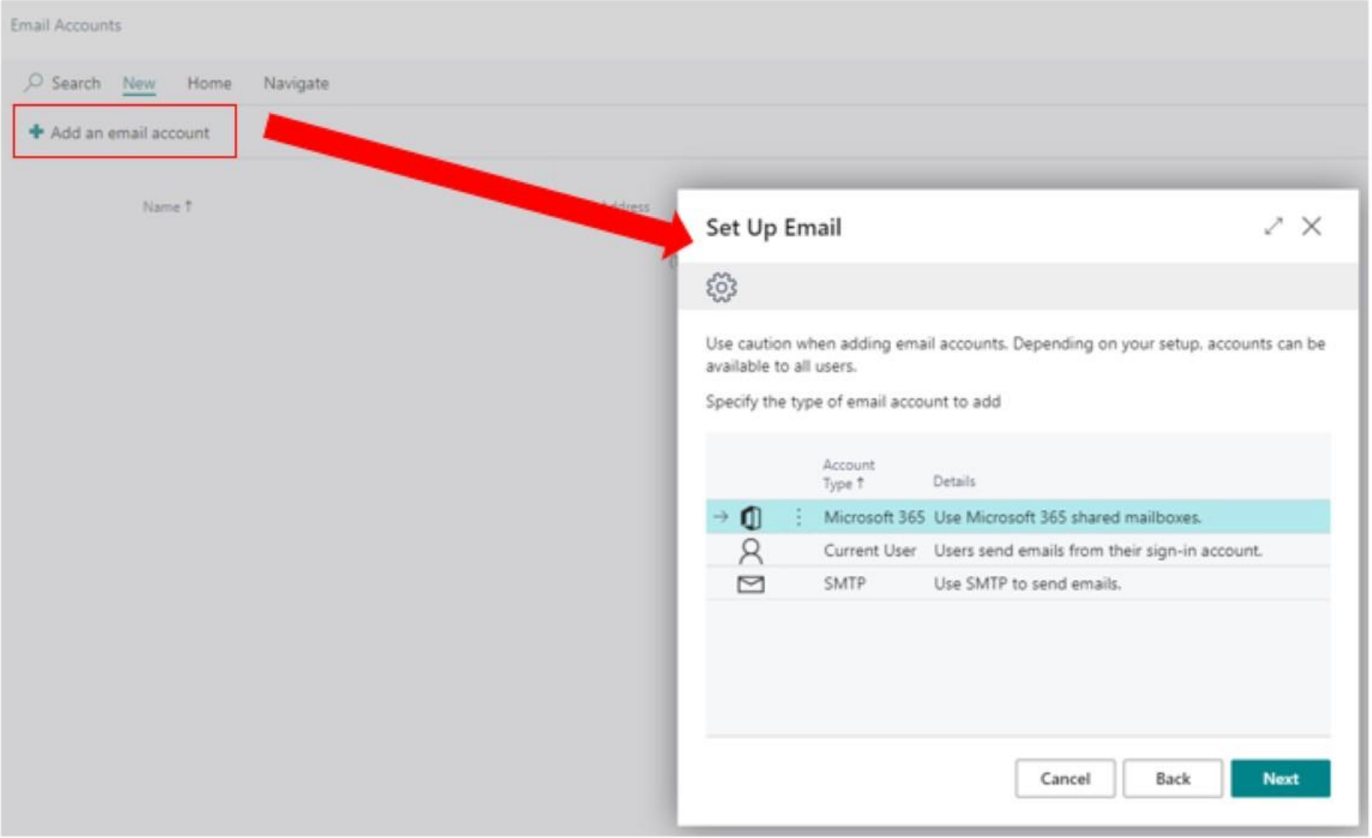
- View the profile into the Role Explorer, Explore All feature
- Copy a profile
- Export/Import a profile in XML
  - Use the same profile in another database

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
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

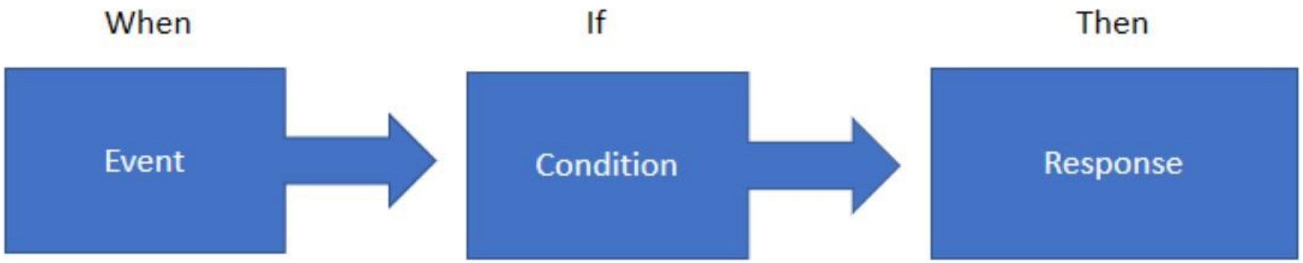
		Account			
	Dimension Value Posting Option	Blank	Code Mandatory	Same Code	No Code
Balance Account	Blank				
	Code Mandatory				Always
	Same Code			Different values	Always
	No Code		Always	Always	

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