

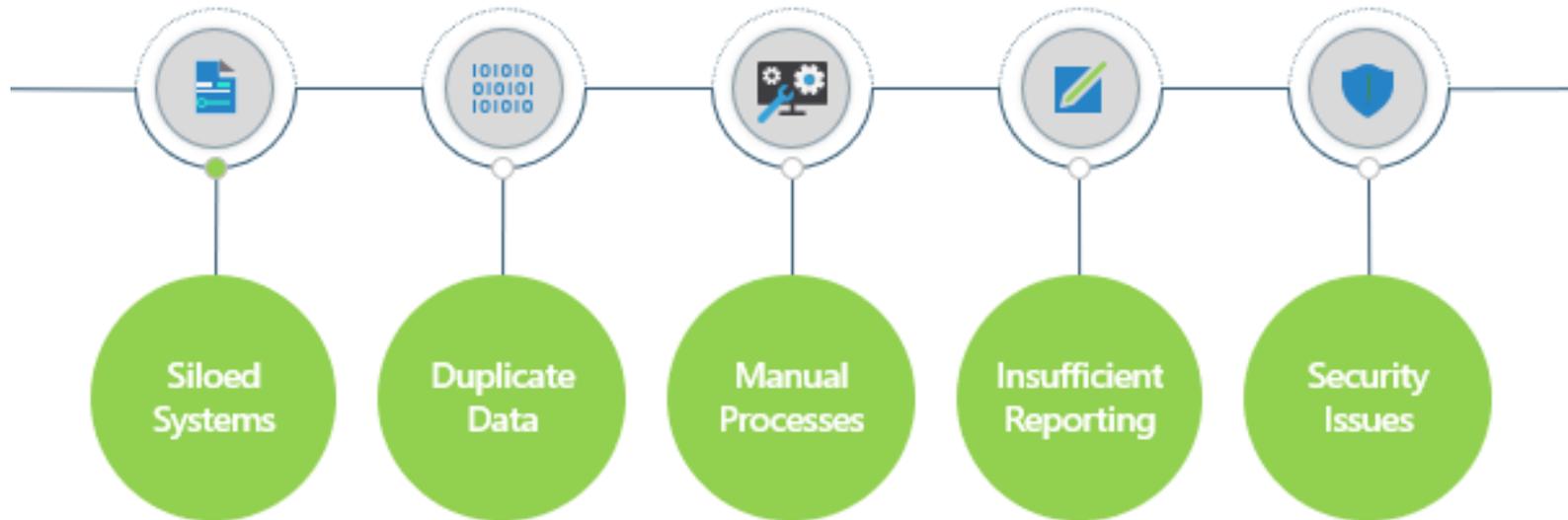
priorityone
Taking you further



Microsoft | Dynamics 365 Business Central

Are you outgrowing your accounting system?

Growing businesses often outgrow their basic accounting software or legacy ERP systems that are unable to handle increased inventory and transactions, lack integration with other line-of-business systems, and have reporting limitations. Customers also feel pain around scalability, mobility, and cloud.



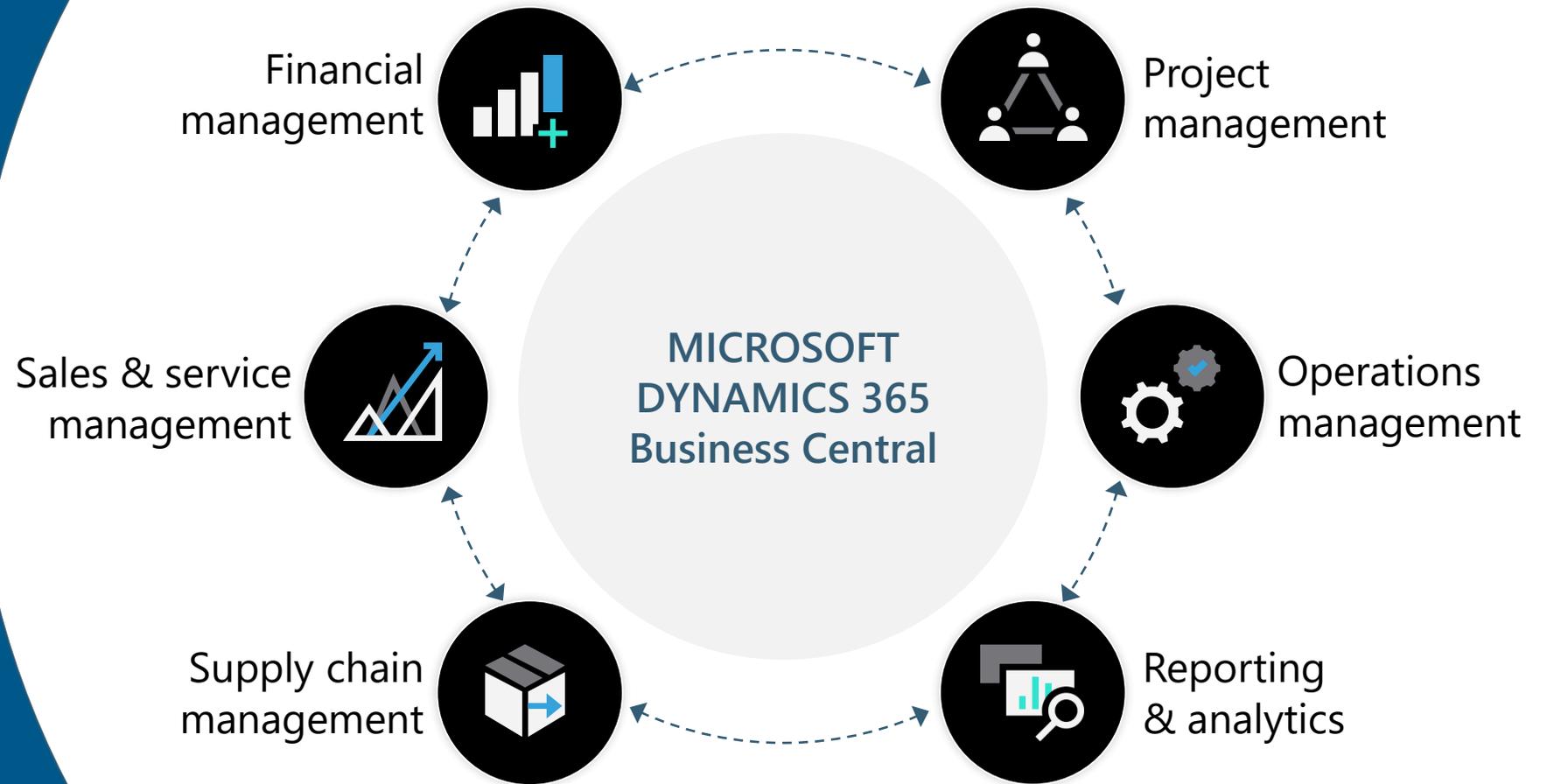
Signs that your current solutions won't be ready to handle additional growth:

- Systems are disconnected and information is siloed
- Duplicate data entry into multiple systems is a daily routine
- Accounting occurs in Excel, not your financial system
- Reporting is complicated and provides insufficient information
- Lack of secure workflows and audit trails increase risk
- Inability to handle increased inventory and transactions

A single, comprehensive solution to meet the needs of growing businesses

Automatically pull systems and processes together to manage financials, sales, service, and operations

Connect with 3rd party applications like eCommerce, payroll, banking, CRM, or industry-specific systems



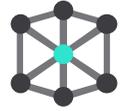
Microsoft Dynamics 365 Business Central

Core Capabilities

 Financial Management	Account Receivables Payables	Bank reconciliation	Fixed asset management	Month/year end closing
 Sales & Service Management	Quote generation	Contact management	Sales invoicing	Payment processing
 Project Management	Capacity planning	Budgets and estimates	Job and process costing	Resource management
 Supply Chain Management	Inventory and Purchasing control	Shipment and distribution	Returns and cancellations	Procurement and vendor management
 Operations Management	Forecasting	Production planning	Manufacturing capacity	Warehouse management
 Reporting & Analytics	Customer insights	Self-serve reports	Interactive dashboards	Built-in intelligence

All-in-one business management

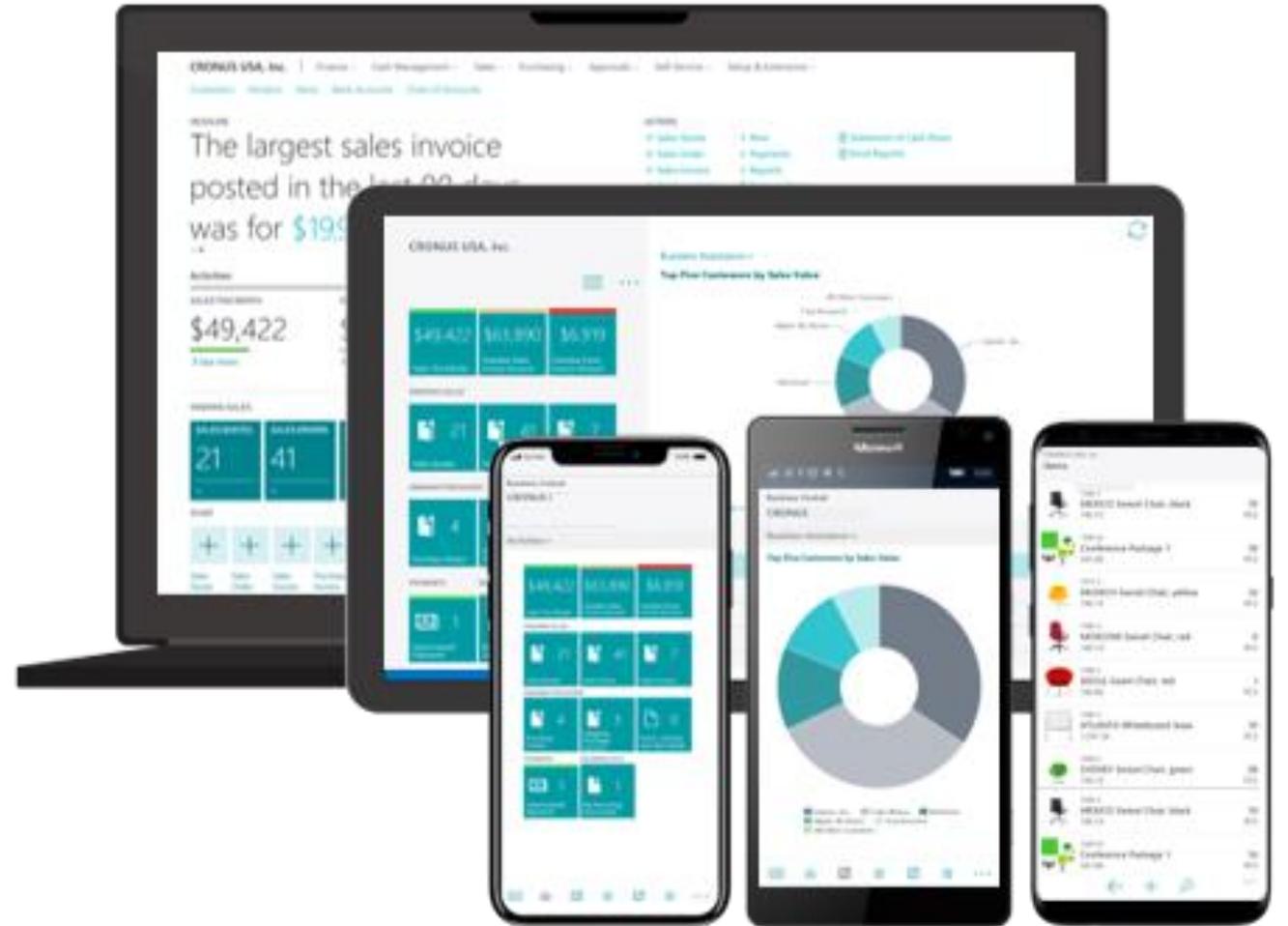
Connect your business



Make smarter decisions



Start and grow easily

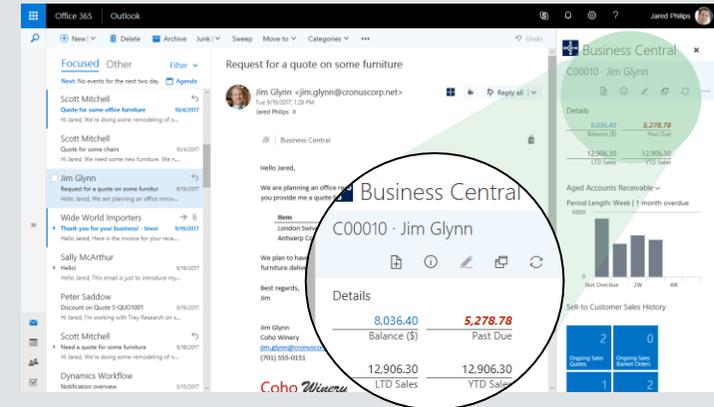
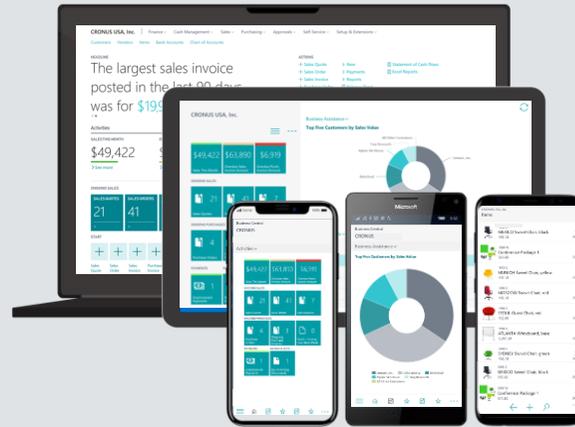
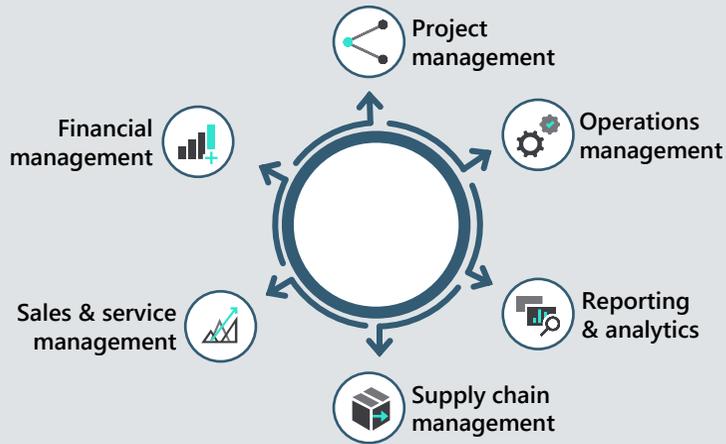
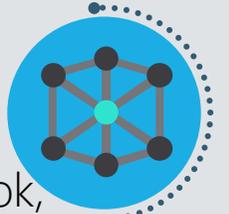


Connect your business

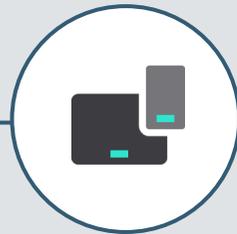
All-in-one nature of the solution removes silos

Full capabilities on desktop, tablet or mobile, on-prem or in the cloud

Deeply embedded within Outlook, so business data and processes work right where users spend most of their time



Deploy a single, comprehensive solution



Work where your Business takes you



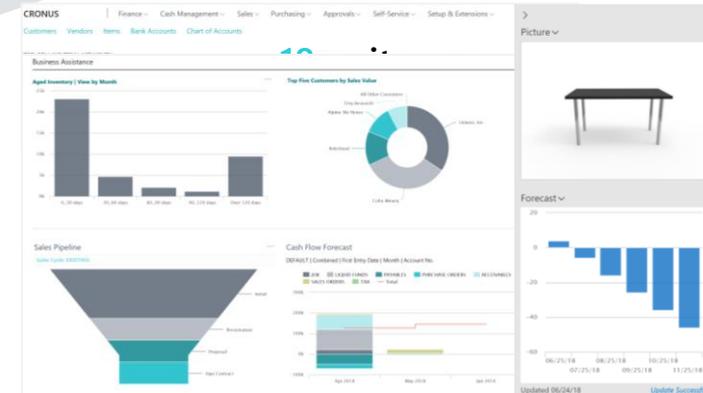
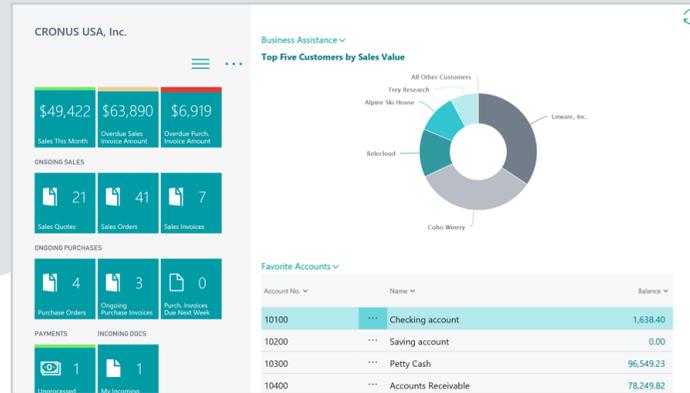
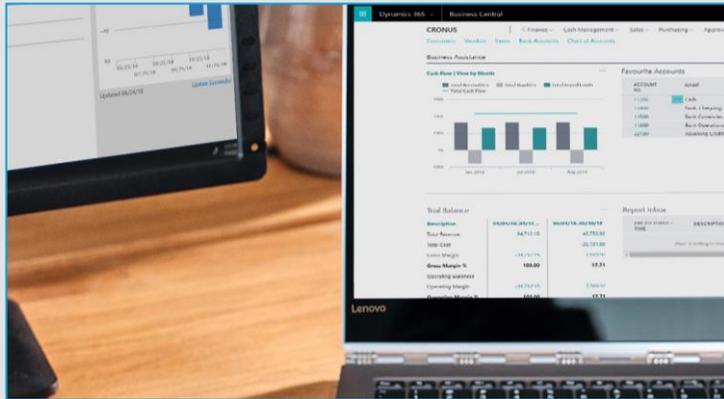
Manage quote to cash, all within Outlook

Make smarter decisions

All business data at your fingertips, real-time; flexible KPIs and dashboards for each user role

Artificial Intelligence enables higher performance and powers an improved customer experience

System suggestions based on historical data, lead to optimized process outcomes and higher productivity



Get an end-to-end view of your business



Sell smarter and improve customer service



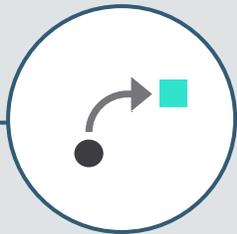
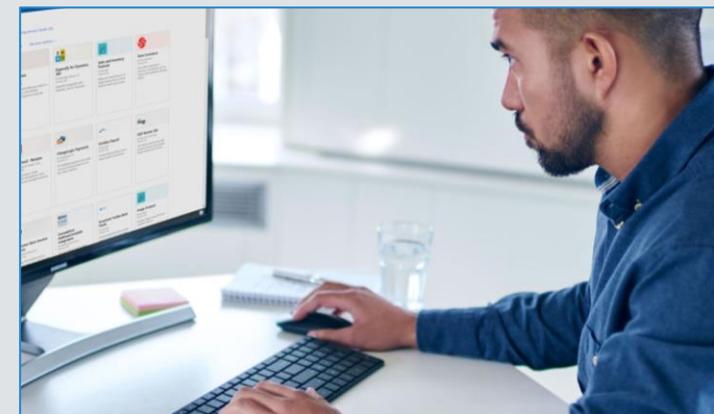
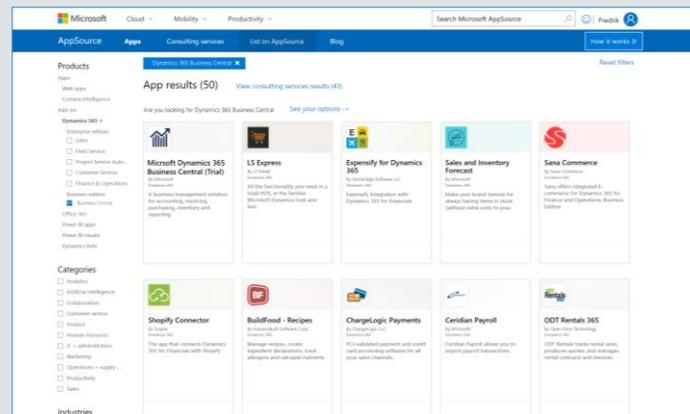
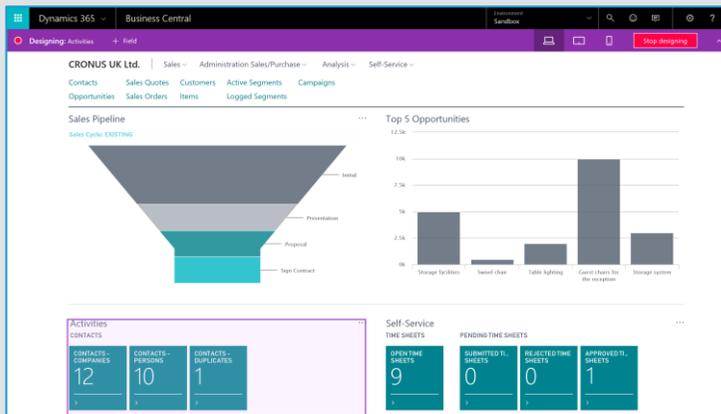
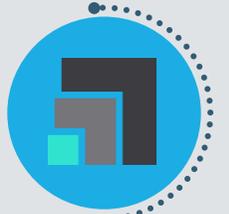
Guide employees to optimal outcomes

Start and grow easily

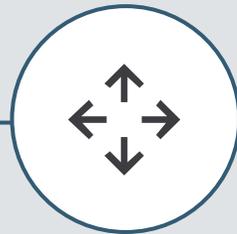
Easily tailor the software in a no-code environment, through the UI or with embedded PowerApps

Visit AppSource to quickly add 3rd party integrations, horizontal or vertical-specific add-on functionality designed to work seamlessly with Business Central

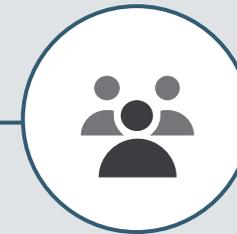
Start with as many (or few) users and modules as required and grow as your needs grow. Business Central will scale and perform as your volumes grow, with no additional cost or system tuning required



Tailor to your needs



Add industry or business extensions



Be ready for growth

Dynamics 365 Business Central – Feature Summary

INSIGHT FROM LAST MONTH

The best-selling item was
ATHENS Desk with 18 units sold

● ○ ○ ○

ACTIONS

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Order
- + Purchase Invoice
- > New
- > Payments
- > Reports
- > Setup
- Excel Reports

Activities

Activities

SALES THIS MONTH

\$1,906

> See more

OVERDUE SALES INVOICE AMOUNT

\$63,890

> See more

OVERDUE PURCH. INVOICE AMOUNT

\$49,422

> See more

SALES INVOICES PREDICT... OVERDUE

0

> See more

ONGOING SALES

SALES QUOTES

2

>

SALES ORDERS

4

>

SALES INVOICES

7

>

ONGOING PURCHASES

PURCHASE ORDERS

4

>

ONGOING PUR... INVOICES

3

>

PURCH. INVOI... NEXT WEEK

0

>

PAYMENTS

UNPROCESSED PAYMENTS

1

>

AVERAGE COL... DAYS

5.8

>

OUTSTANDING... INVOICES

10

>

INCOMING DOCU...

MY INCOMING DOCUMENTS

1

>

Financial Management

General Ledger

Set up companies and how to post to the general ledger through general journals. Use features for VAT and sales tax, recurring journals, and background posting of journals. Posting and reporting can be done in one additional reporting currency.

Use built-in reports, customized reports (both RDCL and Word), refreshable data in Excel, and Power BI reports and charts.

View and edit the data in most pages using Microsoft Excel.

Dimensions

Use unlimited dimensions in transactions in all ledgers for important parts of your business, such as your departments, projects, sales channel, and geographical areas. Set up rules for how to combine dimensions and dimension values. Control the use of dimensions and increase the reliability of output based on dimensions. Assign default dimensions values to master data such as general ledger accounts, customers, vendors, fixed assets, resources, and items. Set up rules to prioritize the use of default values.

Use data from dimensions in reports for filtering, account schedules to analyze your general ledger, and in data sent to Power BI.

Multiple Currencies

Conduct business with customers and vendors in any number of currencies. Use multiple currencies on sales and purchase documents and in bank transactions and payments in payables and receivables. Store currency details for transactions in receivables and payables are stored in local and foreign currencies. Adjust currency values in local and foreign currencies for unrealized gains and losses to keep aging reports correct for receivables and payables.

Budgets

Track business progress using budgets in the general ledger. Use budgets in financial reports, user-defined analysis in account schedules, or in data sent to Power BI for data sharing and analysis.

Import budget information to and from Excel for enhanced calculation capabilities when you prepare budgets.

Financial Management (2)

Accounts Schedules

Use account schedules as a powerful financial reporting tool. Accountants and controllers can include essential business data from the chart of accounts, budgets, cash flow accounts and cost types in financial reports. Use the data to efficiently monitor the health of the business and provide valuable input for business decision makers. Define row and column layouts and combinations to generate the report you need. Calculate totals and sub-totals and control the print output, for example, to compare current and historical budget figures.

Consolidation

Consolidate companies from the same Business Central tenant and pull data directly into the consolidation company, or use XML files to pull data from other Business Central tenants, databases, or third party business management application. Use multiple currencies, dimensions, and budgets for the consolidation.

Intercompany Postings

Manage accounting for more than one company in a posting process that includes one or more Business Central tenants or databases. Send sales and purchase documents to partner companies and post journals transactions through a mapping to shared charts of accounts and dimensions. Control the document flow through an Inbox/Outbox feature that automates sending and receipt. Use sales and purchase documents with multiple currencies to reconcile intercompany balances.

Cash Flow Forecast

Predict how your company's liquidity will evolve over time. Forecast expected cash receipts and disbursements plus available liquid funds.

Create basic cash flow forecast set ups that you can extend and adjust. Use an assisted setup guide for help completing tasks and take advantage of automatic daily or weekly data updates. Include data from jobs and taxes as sources for the cash flow forecast. Use Azure ML capabilities to let Business Central generate cashflow predictions.

Financial Management (3)

Fixed Assets

Track fixed assets such as buildings, machinery, and equipment. Post fixed-asset transactions such as acquisitions, depreciation, write-downs, appreciation, and disposal. Assign one or more depreciation books to define methods and conditions for calculating depreciation. Use depreciation books to meet managerial, internal accounting, and legal reporting requirements. Register maintenance costs, insurance coverage, and cost allocations for assets.

Fixed Assets Allocations

Use allocation keys to distribute percentages of fixed asset transactions, such as acquisition cost and depreciation, to departments or projects.

Fixed Assets - Maintenance

Record maintenance and service expenses for fixed assets. Get detailed information to analyze and make decisions about fixed asset renewal and disposal.

Cost Accounting

Get insight into costs through the visibility of actual and budgeted costs of operations, departments, products, and projects. Combine base data in general ledger transactions with dimensions with known future costs and define a hierarchy of cost centers and cost objects. Allocate costs using allocation runs with different allocation keys and methods.

Analyse general ledger actuals and budgets in user-defined scenarios. Explore the scenarios to gain insight into the business that is not immediately reflected in your chart of accounts.

Deferrals

Set up deferral templates that automate the process of deferring revenues and expenses based on a schedule. Recognize revenues and expenses in periods other than the period in which the transaction is posted.

Cash Management

Bank Account Management

Create, operate, and manage multiple bank accounts to cater to diverse business needs and across different currencies.

Electronic Payments

Create payment proposals based on vendor documents and generate bank payment files.

Reconciliation of Incoming and Outgoing Bank Transactions

Import bank transaction data from your bank. Apply transactions automatically to open customer and vendor ledger entries and create your own matching rules. Review proposed applications and account matches. Change the algorithm behind the record matching by modifying, removing, or adding rules.

Bank Account Reconciliation

Reconcile bank statement data automatically to open bank account ledger entries and keep track of all bank statements.

Filter bank statement information to view only the transactions that need attention. Summarize outstanding bank information and drill-down to the details of each bank transaction.

Sales and Delivery

Sales Invoicing

Set up, post, and print customer invoices and sales credit memos.

Sales Order Management

Manage sales quotes, blanket sales orders, and sales order processes. Create partial shipments, ship and invoice separately, create prepayment invoices for the sales order, and use quotes and blanket orders.

Sales Line Pricing and Discounting

Manage flexible item price and discount structures that differentiate between special agreements with customers and customer groups and are conditioned by parameters such as minimum quantity, unit of measure, currency, item variant, and time period.

Offer the lowest price on sales lines when the sales order meets the conditions you specify on for sales prices. Update the price agreements by using the sales price worksheet.

Campaign Pricing

Connect sales prices and sales line discounts to sales campaigns to give special pricing and discounts to customers and contacts in campaign segments. Specify periods for which prices are valid. Apply campaign pricing and discounts to sales and service orders.

Sales Invoice Discounts

Calculate invoice discounts automatically. Set up any number of invoice discount terms, including a certain minimum amount, discount percentage, and/or a service charge. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice. Calculations can be done in both local and foreign currencies.

Alternative Shipping Addresses

Set up multiple ship-to addresses for customers who receive goods at more than one site. The person creating a sales order or invoice can specify exactly where to send it.

Purchasing

Purchase Invoicing

Set up, post, and print purchase invoices and purchase credit memos.

Purchase Order Management

Manage purchase quotes, blanket orders, and purchase order processes. Creating a purchase order differs from creating a purchase invoice directly. The quantity available is adjusted as soon as an amount is entered on a purchase order line, but it is not affected by a purchase invoice until the invoice is posted. Use this functionality to manage partial receipts, receive and invoice separately and create prepayment invoices for the purchase order, use quotes and blanket orders in the purchase phase. Quotes and blanket orders do not affect inventory figures.

Purchase Return Order Management

Create a purchase return order in order to compensate your own company for wrong or damaged items. Items can then be picked from the purchase return order. You can set up partial return shipments or combine return shipments in one credit memo and link purchase return orders with replacement purchase orders.

Alternative Order Addresses

Set up multiple addresses to manage orders from vendors that in addition to a main business address have more than one site from which they ship orders. These additional locations can then be selected by the purchasing agent when creating a purchase order or invoice.

Purchase Invoice Discounts

Calculate invoice discounts automatically. The discount can differ from vendor to vendor with different minimum amounts (also in different currencies) and different rates, depending on the size of the invoice. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice.

Inventory Management

Basic Inventory

Set up stock items and specify properties such as their unit of measures, costing method, inventory posting group, and unit cost and price. Post item transactions, such as sales, purchase, and negative and positive adjustments from item journals. Store quantity and cost records of posted transactions in the inventory ledger, and use that as the basis for inventory valuation and other costing calculations.

Item Categories

Group items in a hierarchy and define custom categories that include specific attributes.

Item Attributes

Add custom data, such as color, country of manufacture, size, or product dimensions, to applicable items, to supplement built-in global item fields.

Use Azure AI to let Business Central analyze images of your items and automatically suggest item attributes.

Define types of attribute options, including list and text, and integer and decimal that can include units of measure. Translate attribute names and options to multiple languages.

Block attributes or attribute options from being used, for example, if they are no longer applicable.

Item Tracking

Manage and track serial and lot numbers. Assign serial or lot numbers manually or automatically, receive and ship multiple quantities with serial or lot numbers from a single order line entry.

Stock-Keeping Units

Manage stock-keeping units (SKUs). Identical items with the same item number can be stored in different locations and managed individually at each location. Add cost prices, replenishment, manufacturing information, and so on, based on the location.

Inventory Management (2)

Location Transfers

Track inventory as it moves from one location to another. Account for the value of inventory in transit and at various locations.

Shipping Agents

Set up multiple shipping agents (for example, UPS, DHL, external carriers, or your own carrier) and relate their services (express, overnight, standard) with shipping time. Associate default shipping agents and their services with individual customers or specify those details on sales orders and transfer orders to improve accuracy of order promising.

Calendars

Set up calendars with working and non-working days. Assign a base calendar to customers, vendors, locations, companies, shipping agent services, and the service management setup and make changes when needed. Use calendar entries in date calculations on sales, purchase, transfer, production, and service orders, and the requisition and planning worksheets.

Item Charges

Manage item charges. Include the value of additional costs such as freight or insurance in the unit cost or unit price of an item.

Item Cross References

Identify the items a customer is ordering based on item numbers other than your own. Store and easily access cross-reference information from customers, vendors, and manufacturers, as well as generic numbers, universal product codes (UPCs), and European article numbers (EANs).

Item Substitutions

Link items that have the same or similar characteristics to suggest alternatives for out-of-stock items on orders. Provide extra service to customers by offering lower-cost alternatives.

Inventory Management (3)

Item Budgets

Define sales and purchase budgets on the customer, vendor, and item levels. Prepare and record a sales budget that can serve as input to decision makers in operational areas such as purchasing and logistics. Get information about expected demand and use it in business discussions with customers.

Finalize budgets and track the actual sales performance by calculating the variance. Export budget figures to Excel for flexible calculations in the budgeting process.

Analysis Reports

Provide decision makers, especially those with responsibility for sales, purchases, and product portfolio management, with meaningful information that informs day-to-day decisions. Build on item entries to provide customizable analytics that let you add and combine analysis objects, such as customers, items, and vendors, according to your needs.

Cycle Counting

Manage cycle counting to verify inventory record data used to maintain and increase inventory accuracy. You can set up cycle counting on the item or SKU level.

Project Management

Basic Resources

Keep track of resources and prices. Register and sell resources, combine related resources into one resource group, or track individual resources. Divide resources into labor and equipment and allocate resources to a specific job in a time schedule.

Capacity Management

Plan capacity and sales and manage usage statistics and the profitability of resources. Create your plan in a calendar system with the required level of detail and for the period you need. Monitor resource usage and get a complete overview of resource capacity including availability and planned costs on orders and quotes.

Jobs

Track usage on jobs and data for invoicing the customer. Manage fixed-price jobs and time-and-materials jobs:

- Create a plan for a job with multiple tasks and task groupings. Each task can have a budget and can be done for whatever period you need.
- View suggested WIP and recognition postings for a job.
- Plan and invoice job in multiple currencies.
- Assign a specific job to a specific customer and invoice the job completely or partially.
- Use an assisted setup guide to set up jobs, easily enter time sheets and job journals, and use the Project Manager Role Center to access common tasks, new charts, and the list of your jobs.
- Use the Job page to access tasks, assign job ownership, and get visibility into costs and billings.
- Use the Job Quote report to quickly email a customer the price for a project.

Time Sheet

Register time spent and get manager approval using the simple and flexible Time Sheet. Time Sheet integrates with Service and Project Management and can include resources.

Warehouse Management

Bin

Organize your warehouse by assigning items to bins, the smallest unit in the warehouse logical structure.

Bin Setup

Set up and maintain bins by defining both the layout of your warehouse and the dimensions of your racks, columns, and shelves. Give input to planning by defining characteristics for bins.

Inventory Pick and Inventory Put Away

Create pick lists from released sales orders and put away work from released purchase orders. Manage picking and put away work without opening sales and purchase orders when handling shipments.

Warehouse Receipt

Create a put-away work directly from receipts. Manage receipts from a separate user interface in a multi-order environment.

Warehouse Shipment

Create picking lists from shipments. Manage warehouse shipments from a separate user interface in a multi-order environment.

Internal Picks and Put-Aways

Create pick and put-away orders for internal purposes, such as testing put-away for production output, without using a source document (such as a purchase order or a sales order).

Warehouse Management Systems

Manage items on a bin level. Receive and put away items in bins, pick items from bins according to put-away templates, and pick items based on zone and bin rankings. Move items between bins using a report that optimizes the picking process and the use of space or move items manually. Create warehouse instruction documents for pick and put-away processes for sales, purchases, transfers, returns, and production orders.



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Our mission

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