



# MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

 **Paradise**  
I.T. FOR BUSINESS

CAPABILITY GUIDE

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# About Microsoft

## Empowering over 1.2 billion users globally

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In a business world that demands agility and innovation, Microsoft stands as a beacon of transformative technology solutions. With a legacy of ground-breaking advancements in computing, Microsoft offers a comprehensive suite of services designed to catapult your business into the future. For organisations considering an upgrade to a more integrated ERP system, Dynamics 365 Business Central provides an exceptionally smooth transition path.

One of the standout benefits of Business Central is its seamless integration with Microsoft's globally recognised Office 365 suite. This level of compatibility doesn't just offer the comfort of familiar tools; it exponentially amplifies productivity by connecting various business processes. Imagine automating data flows between your ERP system and your email, spreadsheets, or calendar events. With Business Central, it's not just possible—it's effortless.

And the deep integration extends beyond Office 365, linking up with other Dynamics 365 applications and various third-party solutions. This interconnectivity ensures a unified, holistic approach to managing all aspects of your business, from customer relationships to supply chain logistics, all under one digital roof.

Whether you're a burgeoning start-up or an established enterprise, Microsoft's scalable, flexible solutions are designed to grow with you. Elevate your operational capabilities and unlock new avenues for expansion with Microsoft and Dynamics 365 Business Central.

*End-to-end solutions connecting  
every part of your business*







# About Paradise Computing

## Building Smarter Business

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### Your Award Winning IT Solutions Partner

Since 1987, Paradise Computing has been at the forefront of delivering bespoke IT solutions. Specialising in Microsoft Dynamics 365 Business Central and Sage 200 ERP, Bespoke Software Development, and Cloud Hosting, we have consistently provided cutting-edge technology solutions. Based in the heart of Northamptonshire, we proudly hold the title of a certified Microsoft Solutions Partner, further strengthened by our ISO27001 Information Security Management System accreditation, ensuring your data is managed and protected to the highest security standards.

### Comprehensive Support for Your Business

But our commitment goes beyond technology. We understand that success is not just about the tools; it's about the support that drives your business forward. Our all-encompassing support services are integral to our partnership ecosystem, including targeted business training courses, IT helpdesk, and robust cyber security protection, bolstering the backbone of your operation. We're here to ensure that your technology investments are maximised, your data is secure, and your team is empowered. We support your systems and your people on a partnership journey to build a smarter, safer and more efficient business.

### PROUD to be Paradise: The Values That Guide Us

**Professional:** Through leveraging our extensive knowledge, skills, and experience, we not only maintain a high standard of work that we're proud of but also ensure you receive excellent service.

**Reliable:** You can count on us to be your reliable and trusted partner, consistently delivering products and services you and your business can depend on.

**Original:** We're not afraid to question the norm. We're excited by a challenge. If there's a better way, we're determined to find it or develop an innovative solution to solve it.

**Understanding:** We invest time to understand your unique business needs, allowing us to design the best possible solutions to achieve your goals.

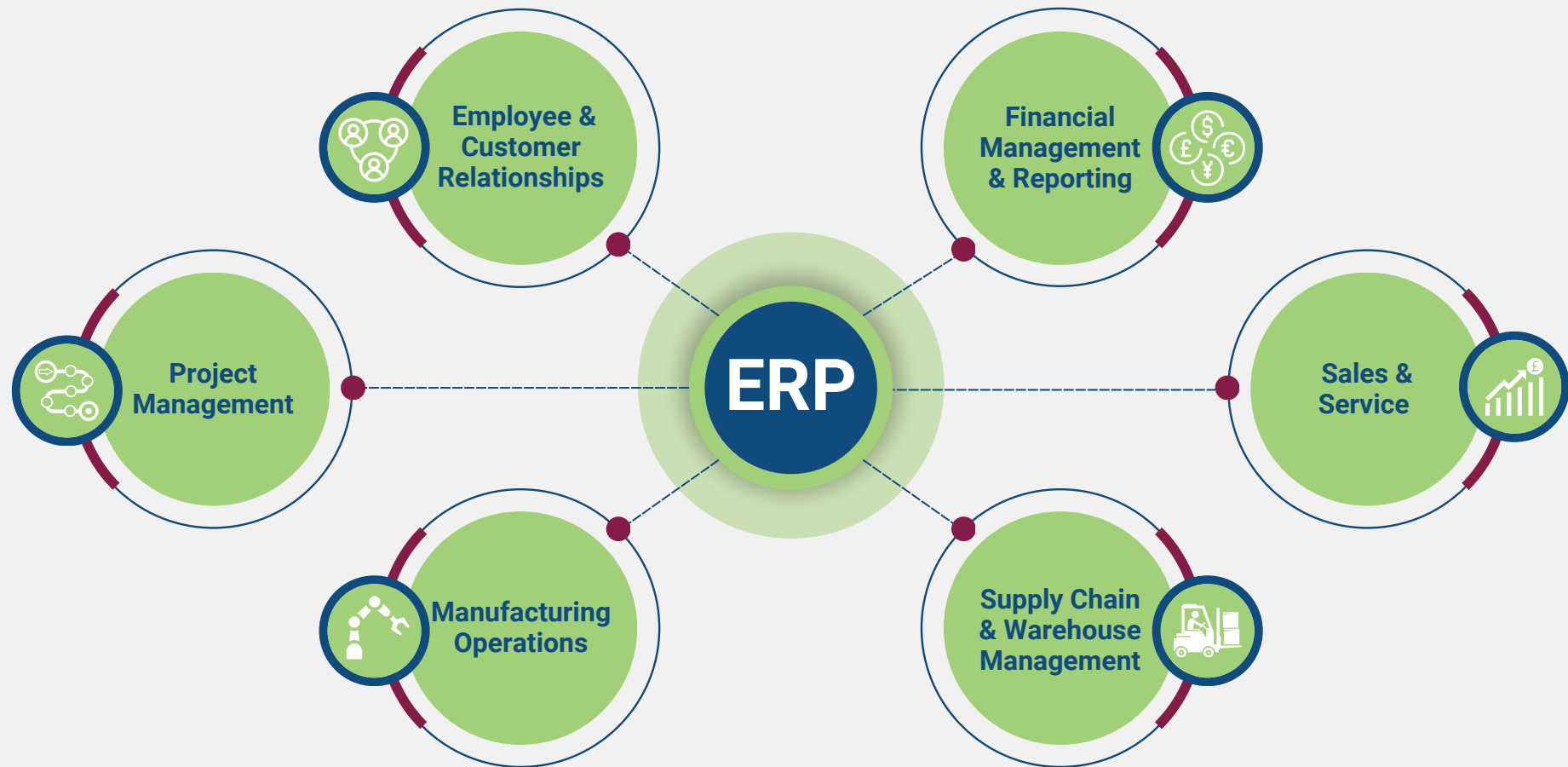
**Dedicated:** We deliver solutions designed for long-term business growth and scalability, serving as the foundation for enduring partnerships with our valued clients.

*Whatever your business needs,  
we've got it covered.*



# TRANSFORM YOUR BUSINESS OPERATIONS WITH THE INTEGRATED POWER OF ERP

Connecting operations across your small or medium-sized business





# Dynamics 365 Business Central

## Connecting your entire business

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### **Streamlined Operations for Modern Businesses**

This comprehensive business solution streamlines a wide range of operations, from financial management to supply chain optimisation, in a user-friendly, integrated environment. And as you'd expect from a Microsoft product, Dynamics 365 Business Central works seamlessly with other familiar Microsoft applications like the Dynamics suite, Excel, Outlook and Teams.

### **Unlock productivity and business insights**

Connect people, processes, and insights to make better decisions faster with embedded guidance, dashboards, and integration with Microsoft 365 and Microsoft Teams.

### **Increase financial and business performance**

Accelerate financial close, improve forecasting, and get real-time performance metrics and reporting while fostering compliance across subsidiaries.

### **Scalability, Security, and Adaptability**

Adopt new business models faster with flexible deployment, reliability, security, and an adaptable cloud solution that grows with you.

### **Boost sales and improve customer service**

Take better care of customers by managing the entire sales process from within Microsoft Outlook, and deliver better outcomes with connected service operations.

### **Finish projects on time and under budget**

Ensure successful project execution and profitability with planning, resourcing, tracking, costing, billing, accounting, and real-time intelligence.

### **Optimise stock & supply chain management**

Deliver products on time and adapt to changing business models with visibility across purchasing, manufacturing, stock, and warehouses.

### **Industry-Specific Solutions**

Whether you are in finance, supply chain, manufacturing, sales, project management, services, or any other sector, Microsoft's ERP offerings provide the tools to efficiently manage complexity while fostering growth.

# Financials

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**Accelerate financial close, improve forecasting, and get real-time performance metrics while fostering compliance and security across subsidiaries.**

## **General Ledger**

Set up companies and 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, customised reports (both RDCL and Word), and easily refresh data in Microsoft Excel, and Power BI reports and charts.

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

## **Dimensions**

Use unlimited dimensions in transactions in all ledgers for important parts of your business, such as 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 prioritise the use of default values.

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







## Financials (continued)

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### Multiple currencies

Conduct business with customers and vendors in any number of currencies. Use multiple currencies on sales and purchase documents, bank transactions, and payables and receivables payments. Store currency details for transactions in receivables, while payables are stored in local and foreign currencies. Adjust currency values in local and foreign currencies for unrealised 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 Microsoft Excel for enhanced calculation capabilities when you prepare budgets.

### Cost Accounting

Gain 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 centres 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 are 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. Recognise revenues and expenses in periods other than the period in which the transaction is posted.

# Financials: Multi-Site Capabilities

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## 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 consolidations.

## 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.

## 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 allocation

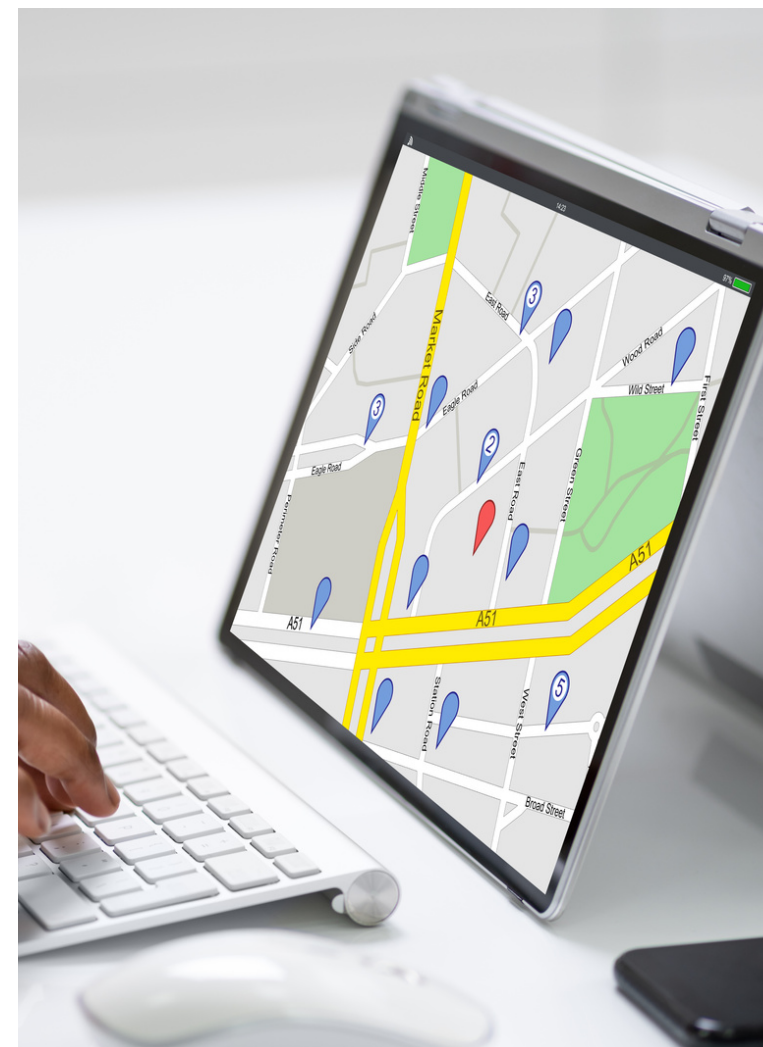
Use allocation keys to distribute percentages of fixed asset transactions, such as acquisition cost and depreciation, to departments or projects.

## Fixed assets insurance

Track insurance coverage and premiums for fixed assets and easily determine whether they are under- or over-insured. Attach assets to one or more insurance policies and index insurance amounts.

## Fixed assets maintenance

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



# Financials: Cash Management

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## **Bank account management**

Create, operate, and manage multiple bank accounts for diverse business needs and different currencies.

## **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 forecasts that can be extended and adjusted. Use an assisted setup guide to complete 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 generate cash flow predictions using Business Central data.

## **Electronic payments and direct debits**

Create payment proposals based on vendor documents and generate bank payment files in ISO20022/SEPA format. Or use the AMC Banking Service to generate electronic payment files in the format your bank requires. Create direct debit collections for a bank direct debit file in ISO20022/SEPA format.

## **Easy payment process for your customers**

Provide efficient payments submissions to your customers by adding online payment services links to invoices in Business Central (online version only).

Use the PayPal extension for access to a trustworthy global payment service that offers multiple ways to accept payments, including credit card processing and PayPal accounts.

## **Reconciliation of incoming and outgoing bank transactions**

Import bank transaction data from electronic files sent from your bank in ISO20022/SEPA format or other file types. 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.

Reconcile bank payments from the Payment Reconciliation Journal in one step, and in one place.

## **Bank account reconciliation**

Import bank statement data from electronic files sent from your bank in ISO20022/SEPA format or other file types. 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. Summarise outstanding bank information and drill-down to the details of each bank transaction.

## **Cheque writing**

Print cheques as automated electronic cheques or write them manually, both with flexible options for voiding, reprinting, using check forms with pre-printed stubs, and testing before printing. Consolidate payments to a vendor in a single cheque.



# Reporting & Data Analysis

Small and mid-sized companies rely on built-in analytics and reporting that they can use out-of-the-box to help keep track of their business.

## Unleashing the Power of Data

In today's data-driven business environment, having real-time analytics and reporting is not just a luxury; it's a necessity. Small to mid-sized companies find immense value in Business Central's robust, out-of-the-box analytics and reporting capabilities that seamlessly track various business operations.

## Versatility Across Business Models: A One-Size-Fits-All Approach Doesn't Cut It

Business Central is designed to cater to both common and complex business processes. Each process is accompanied by detailed reporting and analytics tools to help you dig deeper into your data. You don't even have to switch applications; ad-hoc analysis is conveniently accessible right from your Home page, giving you instant insights when you need them the most.

## Financial Reporting Elevated: Master Your Accounts Schedules

Account schedules serve as a potent tool for financial reporting in Business Central. No longer limited to just accountants and controllers, this feature allows a broader range of stakeholders to pull essential business data from various sources like the chart of accounts, budgets, cash flow accounts, and cost types.

## Data-Driven Decision Making: Turning Insights into Actions

Harness this rich data to continually assess your business health and offer invaluable contributions to strategic decisions. With the flexibility to define row and column layouts, Business Central enables you to generate customised reports effortlessly. You can calculate totals and sub-totals and control print outputs to make relevant comparisons—be it current figures against historical data or budgetary changes over time.





# Sales

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**Empower your sales team to take better care of customers by establishing best practices using familiar productivity tools to managing the entire sales process from within Microsoft Outlook.**

## **Contact management**

Maintain an overview of your contacts and personalise your approach to each one. Record contact information for all business relationships, and specify the individual people related to each contact. Be alerted if you enter duplicate contact information. Get a precise view of prospects and customers by categorising your contacts based on weighted profiling questions (assign the weights of two questions to identify the value of a third question). Divide customers into ABC segments and rate results to target contacts for campaigns. Easily create quotes for prospects and send sales documents for specific contacts.

## **Campaign management**

Organise campaigns for segments of your contacts that you define based on reusable criteria, such as sales, contact profiles, and interactions, and reuse existing segments. Send documents to people of different nationalities in their native language by using Campaign Management with Interaction/Document Management.

## **Email logging for Microsoft Exchange Server**

Log all inbound and outbound email messages sent through Business Central or Microsoft Outlook®. Logging can be manual, or automated. Use a server-based solution with Microsoft Exchange Server to keep email messages in their native environment and ease administration.

# Sales (continued)

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## **Interaction and document management**

Record interactions that you have with your contacts, such as telephone calls, meetings, or letters, and attach documents such as Word, Excel, or TXT files. Automatically log other interactions, such as the sales orders and quotes that you exchange contacts, and revisit them if needed.

## **Opportunity management**

Keep track of sales opportunities. Section your sales processes into different stages to get an overview of and manage your sales opportunities.

## **Better together with Microsoft Dynamics 365 Sales**

Enable integration between Dynamics 365 Business Central and Sales for a more efficient lead-to-cash process. Empower users to make more informed decisions without switching products. Gain efficiency by ensuring tight integration between accounts and customers and adding cross-product features for the lead-to-cash flow.

Use the assisted setup guide to connect Business Central with corresponding records in Sales.

Work with prices in currencies that differ from the local currency, using the coupling of the sales price list record in Business Central with the price list in Sales.

Check for available product inventory directly from Sales and synchronise sales orders to Business Central for fulfilment, invoicing and payments.







# Sales: Delivery Management

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## **Sales invoicing**

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

## **Sales order management**

Manage quotes, blanket orders, and 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 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 prices and 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.

## **Sales return order management**

Create return orders to compensate customers who received incorrect or damaged items. Then receive returned items and link to a replacement sales order. Create a partial return receipt or combine return receipts on one credit memo.

## **Bulk invoicing from Microsoft Bookings**

For companies using Microsoft Bookings in Office 365, it's possible to do bulk invoicing. The Un-invoiced Bookings page in Microsoft Dynamics Business Central provides a list of the company's completed bookings. In this page you can quickly select the bookings you want to invoice and create draft invoices for the services provided.

# Supply Chain Management

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**Deliver products on time and adapt to changing business models with visibility across purchasing, manufacturing, inventory, and warehouses.**

## **Purchase invoicing**

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

## **Purchase order management**

Manage 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 it is posted. Easily 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 who have more than one shipping site. 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.

## **Purchase line discounting**

Manage multiple item negotiated purchase price discounts as based on such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best unit cost, as based on the highest discount, is calculated for the purchase line when the order details meet the conditions specified in the purchase line discounts table.

## **Alternative vendors**

Manage purchase of the same item from different vendors. Set up alternative vendors for items, specify typical lead times, and record price and discount agreements with each vendor.

## **Vendor catalogue**

Offer items to customers that are not part of regular inventory, but can be ordered from vendors or manufacturers on a one-off basis. Register these items as non-stock items but treat them like regular items.



# Supply Chain Management: Inventory Control

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## **Inventory management**

Set up stock items and specify properties such as unit of measure, 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 it as the basis for valuation and other costing calculations.

Set up non-inventory and services in the same way as stock items and use them in sales, purchase, or consumption transactions, but without need to keep track of stock and costing.

## **Item categories**

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

## **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. Use the additional customisable item tracking dimension to keep track of simple WMS packages or pallets.

## **Item attributes**

Add custom data, such as colour, country of manufacture, size, or product dimensions, to applicable items, to supplement built-in global item fields. Use Azure AI to let Business Central analyse images of your items and automatically suggest 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, if for example, they no longer are applicable.

## **Multiple locations**

Manage inventory in multiple locations, such as production plants, distribution centres, warehouses, show rooms, retail outlets, and service cars. Inventory on each location can have its own location-specific financial dimensions or posting rules. Enable CFO or financial leaders to get information about inventory using financial reporting.

## **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 Control (continued)

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## Item variants

Item variants are a great way to keep your list of items under control, especially if you have a large number of items that are almost identical—for example, when they vary only in colour. Rather than setting up each variant as a separate item, you can set up one item and then specify the various colours as variants of the item. Variants are supported in all areas of product including manufacturing and planning, unlocking scenarios in industries where for example, inventory is tracked by revision.

## 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 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 Control (continued)

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### 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. Finalise 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 with insightful details that inform day-to-day decisions regarding sales, purchases, and product portfolio management. Build on item entries to provide customisable 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.



# Supply Chain Management: Planning & Availability

## Supply planning

Plan material requirements based on demand with support for master production scheduling and materials requirements planning. Generate optimal suggestions for replenishing inventory transfers based on the item's current and future demand and availability, as well as a variety of planning parameters, such as minimum and maximum quantities and reorder quantities. Use automatic orders for assembly, purchase, production, and transfers, and action messages to balance supply and demand. Use time buckets when planning material requirements.

## Demand forecasting

Manage demand forecasting based on items. Input demand (sales) forecasts for products and components in a more convenient way (daily, monthly, quarterly). Create production and purchase orders that consider the demand forecast, available inventory, and plan requirements.

## Sales and inventory forecasting

Get deep insight into potential sales and a clear overview of expected stock-outs by using the Sales and Inventory Forecast extension. Leverage its built-in Azure AI capabilities to generate reliable forecasts that make it easier to manage replenishment.

## Order promising

Promise accurate order shipment and delivery dates based on an item's current and future availability. When items are not available to meet a customer's requested delivery date, calculate the earliest shipment date as either an available-to-promise date that is based on upcoming uncommitted supply or a capable-to-promise date, which is when items can become available.

## Drop shipments

Handle orders that ship directly from the vendor to the customer without having to physically stock items in your inventory. Keep track of order costs and profit. Link sales orders to purchase orders to control the sequence of posting tasks.

## Order planning

Plan supply for all types of demand on individual orders using a simple supply planning tool.

## Calculate availability on the fly

Once quantity is entered in any type of order: purchase, sales, production or transfer, the system immediately updates the availability information, notifying the user who enters the order about current and future situation. Be fully equipped with information about inventory availability by date, event, variant, location, even bill of material and unit of measure.







# Project Management

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**Ensure successful project execution and profitability with planning, resourcing, tracking, costing, billing, accounting, and real-time intelligence.**

## **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 labour 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.

## **Multiple costs**

Manage alternative costs for resources and resource groups. Costs can be fixed, percentage based, or an additional fixed charge. Define as many work types as you need.

## **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.

# Project Management: Jobs

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## **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.
- Copy a budget from one job to another and set up a job-specific price list for item and resource charges and general ledger account expenses for the customer.
- 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.
- Change bill-to customer for projects where the party that is receiving a service is different from the party that is paying the bill.
- Use an assisted setup guide to set up jobs, easily enter time sheets and job journals, and use the Project Manager Role Centre 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. Split work between project managers, who create plan for job, warehouse workers who deal with picking inventory for jobs and staff performing the work.







# Service Management

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**Deliver better service experiences with planning, dispatching, and service contract management.**

## **Planning and dispatching**

Assign personnel to work orders and log details such as work order handling and work order status. For dispatching, manage service personnel and field technician information, and filter according to availability, skills, and stock items. Gain an overview of service task prioritisation, service loads, and task escalations.

## **Service contract management**

Set up agreements with the customers about service levels:

- Maintain information on contract history, contract renewal, and contract templates.
- Manage warranties for service items and spare parts.
- Record details on service levels, response times, discount levels, and the service history of each contract, including service items and parts used and labour hours.
- Measure service contract profitability.
- Generate service contract quotes.

## **Service item management**

Record and keep track of all your service items, including contract information, component management, and BOM reference and warranty information. Use the Trendscape Analysis feature to view key performance indicators for service items during various periods.



# Service Management (continued)

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## **Service order management**

Register post-sales issues including service requests, services due, service orders, and repair requests. Let customers initiate service requests or create them automatically according to the terms of service agreements.

Register and manage equipment loans to customers. Get a complete history of service orders and service order quotes through the Service Order Log.

## **Service price management**

Set up, maintain, and monitor service prices. Set up price groups based on criteria, such as the service item (or several item groups), the service tasks, or the type of fault for a period of time or for specific customers or currencies.

Define price calculation structures that include all parameters involved in providing service, such as the parts used, the types of work, and the service charges.

Automatically assign the correct price structure to service orders that match the price group criteria. Assign fixed prices, minimum prices, or maximum prices to price groups and view statistics about profitability.





# Warehouse Management

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**Reduce operations costs with efficient warehouse operations that help you ship orders on time and deliver on promised customer outcomes.**

## **Levels of warehouse management**

Configure warehouse processes as required for each location. Decide whether to use bins or not, should warehouse team work with separate documents or update sales and purchase orders. Should pick and shipment be separate steps or can they be performed in one go?

## **Bin**

Organise your warehouse by assigning items to bins, the smallest unit in the warehouse logical structure. Use item journals to assign bin directly on document lines. Default or fixed bins will speed up document processing.

## **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-aways**

Create pick lists from sales orders and put-away work from purchase orders to assign tasks to warehouse team, who can complete picking and put away work without opening sales and purchase orders.

# Warehouse Management (continued)

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## **Warehouse receipt**

Manage receipts from a separate user interface in a multi-order environment. Create a put-away work directly from warehouse receipts or use put-away worksheet to create multiple put away tasks.

## **Warehouse shipment**

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

## **Internal pick ups and put-aways**

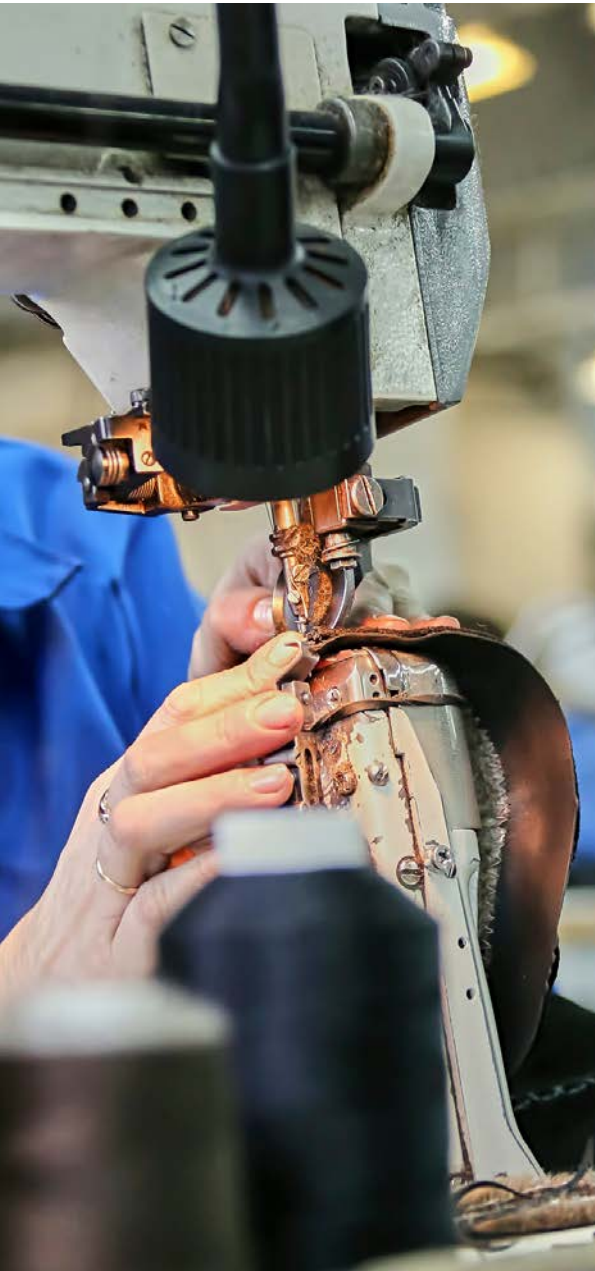
Create pick and put-away orders for internal purposes, such as testing put-away for production output, without using a source document (such as a purchase order or a sales order).

## **Directed pick up and put-away**

Receive and put away items in bins according to put away templates, and pick items based on zone and bin rankings. Use worksheet to move items between bins to optimise the picking process and the use of space. Avoid wasting time by utilising cross-docking. Deal with different units of measures for same items.







# Manufacturing

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**Enable proactive manufacturing operations to improve throughput, quality and uptime, while reducing costs and delivering on customer expectations.**

## **Assembly management**

Specify a list of sellable items, raw materials, sub-assemblies, and resources as an assembly bill of materials that make up a finished item or a kit. Use assembly orders to replenish assembly items. Capture customer requirements for the kit's bill of materials directly from sales quotes, blanket orders, and order lines in the assembly-to-order processes.

## **Standard cost worksheet**

Give company controllers a reliable and efficient way to maintain accurate inventory costs. Work with standard cost updates in Business Central in the same way you would in an Excel spreadsheet. Prepare for cost updates without changing data until you're ready.

## **Product bill of materials**

Create bills of materials and calculate their standard costs. Keep track of different versions and know which components were valid at a specific moment of time and for specific production batch.

## **Basic capacity planning**

Add capacities (work centres) to the manufacturing process. Set up routings for production orders and material requirements planning. View loads and the task list for the capacities.

## **Subcontracting**

Delegate all or part of operations to external work centres. Use separate location and transfer order to track raw materials. Register performed work with purchase orders.

## **Finite loading**

Manage finite loading of capacity-constraint resources. Account for capacity constraints for periods to avoid overloading work centres.

## **Scrap**

Scrap can be inevitable in the manufacturing process. But making sure it is properly recorded is essential to proper inventory and cost management.

# Globalisation & Compliance Regulations

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## **Support globalisation and compliance regulations like International Financial Reporting Standards, local functionality, GDPR, and more.**

Confidence in a business management solution is key to running an efficient business. With Business Central companies are empowered to streamline business processes while consistently and cost-efficiently complying with increasing regulation and reporting requirements.

### **Data privacy**

Business Central supports data privacy initiatives such as General Data Protection Regulation (GDPR).

### **Manage compliance standards**

Deliver integrated information, aligned processes, and easy-to-use tools to help your people meet the financial management expectations and standards that matter to your specific business.

### **Globalisation**

Get support for 25 languages, localisations, and no-code user interface changes. Purpose-driven extensions from the Microsoft AppSource business applications marketplace will help you meet local requirements.

## **Accounting processes & controls to aid compliance**

Companies face increasing financial accounting challenges. Depending on industry, markets, geographic location, and financing needs, an organisation may be subject to local generally accepted accounting principles (GAAP) and one or more of:

The Sarbanes-Oxley Act (SOX), a U.S. law passed in 2002 to protect investors by improving the accuracy and reliability of corporate disclosures. The principles of SOX around corporate governance, financial disclosure, and public accounting have influenced similar regulations and best practices globally, including in the UK.

The International Financial Reporting Standards section of the European Union's International Accounting Standards (IAS/IFRS), which went into effect in 2005 and sets forth international accounting standards for recognition, measurement, consolidation, and reporting.

The New Basel Accord (Basel II), enacted in 2006 to address issues of financial institution risk and to promote greater stability in the overall financial system.





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