

Capture the Cloud Webinar Series

March 21, 2019

Digitally Transform Your Business with Dynamics



Agenda for today



SYNNEX Promos

Brent Ayers— *Business Development, SYNNEX*

5 min.



Digitally Transform Your Business with Dynamics

Craig Crescas— *Microsoft Partner Technology Strategist for Dynamics*

45 min.



Q&A

10 min.

Microsoft M365 Throwdown

From February 1 – April 30, 2019, earn an array of fantastic prizes ranging from training credits to devices to an all-day onsite training/networking event when you sell M365!

- **3rd Place Winners** – Global Knowledge Training Credits
 - Company who has 3rd highest M365 seat adds from February CSP invoice – April CSP invoice
- **2nd Place Winners** – Surface Laptops – 2 devices to winner
 - Company who has 2nd highest M365 seat adds from February CSP invoice – April CSP invoice
- **1st Place Winners** – One on One Training and Social Event
 - Company who has highest M365 seat adds from February CSP invoice – April CSP invoice

Ts&Cs: Maximum total value of \$14,000 in prizes. 3rd place threshold is approximately worth \$3000 in Global Knowledge Credits. 2nd place threshold is approximately worth \$3000 in devices. 1st place threshold is approximately worth \$8000 for onsite training and social event. Training and event must take place on the same day. Training must take place at partner office, with social event to follow. Does not include any travel costs associated. Partners are limited to 1 prize threshold and will be awarded the highest eligible payout threshold for the promotion. Contracts cannot be bundled for thresholds. Limited quantities available. All Business and Enterprise SKUs are eligible. Non Profit, Government, and Education SKUs are excluded. Full eligible SKU list available in Promo Central.



CSP/O365 Migration Promotion

For any* Net New Microsoft CSP/O365 order placed February 1 – April 30, Resellers will receive a FREE MigrationWiz Mailbox license to assist in the migration of client O365 licenses.

Please email sethg@synnex.com or brandonph@synnex.com with the confirmation email from CLOUDSolv & email address that you want the BitTitan licenses to be delivered to.



Please note that O365 licenses must be net new to SYNnex, offer is good until April 30th or until SYNnex runs out of BitTitan licenses, & must keep O365 license with SYNnex for 12 months. Max # of licenses that can be awarded per reseller is 500. All Business and Enterprise SKUs are eligible. Non Profit, Government, and Education SKUs are excluded. Full SKU list available in PromoCentral.

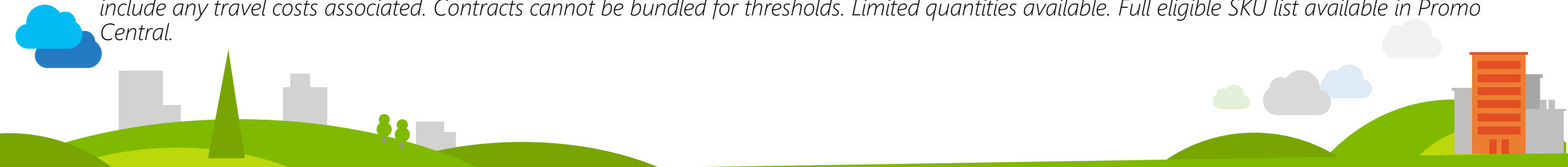


Microsoft O365 & Azure Throwdown

From March 1 – May 31, 2019, earn an array of fantastic prizes ranging from training credits to devices to passes for Microsoft Inspire when you sell O365 & Azure! For each prize level, there is 1 winner for Azure and 1 winner for O365, not to mention an additional “Kicker” category so everyone has a chance to cash in.

- **3rd Place Winners (2)** – Global Knowledge Training Credits
 - Company who has 3rd best growth of their O365 & Azure business from March CSP invoice – May CSP invoice
- **2nd Place Winners (2)** – Surface Pros – 2 devices to ea. winner
 - Company who has 2nd best growth of their O365 & Azure business from March CSP invoice – May CSP invoice
- **1st Place Winners (2)** – Two passes to Microsoft Inspire
 - Company who has best growth of their O365 & Azure business from March CSP invoice – May CSP invoice
- **Kicker Prize (6)** – Surface Go
 - Sell 15K in MRR in O365 by May invoice with SYNNEX (Limit 3 winners, 1 device ea.)
 - Sell 10K in MRR in Azure by May invoice with SYNNEX (Limit 3 winners, 1 device ea.)

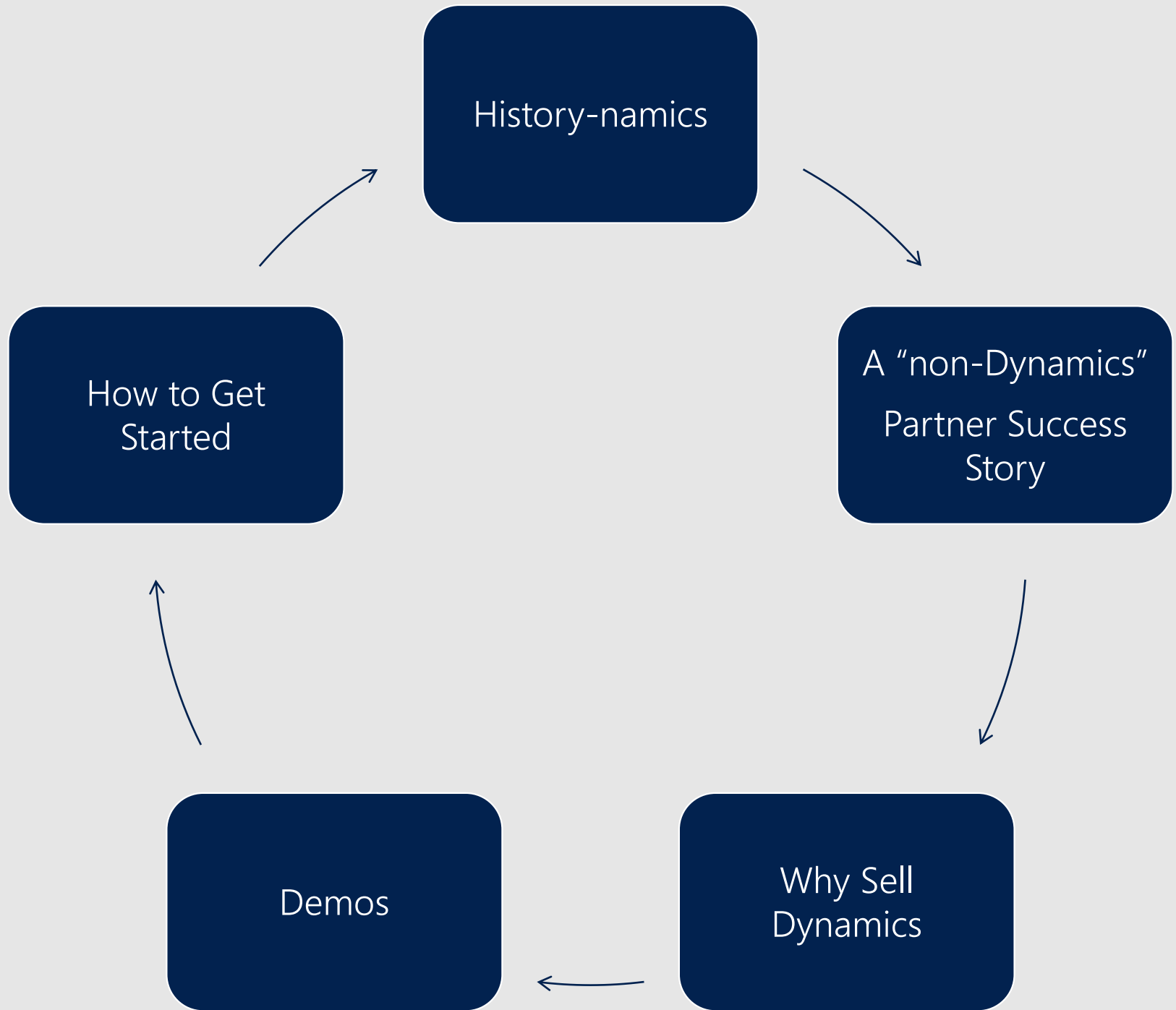
Ts&Cs: Maximum total value of \$26,000 in prizes. Each threshold will have 2 winners – 1 for Azure sales and 1 for O365 sales. Partners are limited to 1 prize threshold per product category and will be awarded the highest eligible payout threshold for the promotion. For Kicker Prize, if limit of winners is exceeded, then highest total will be used to determine winner. 3rd place threshold is approximately worth \$3000 in Global Knowledge Credits. 2nd place threshold is approximately worth \$3000 in devices. 1st place threshold is approximately worth \$5000 for Inspire passes. Does not include any travel costs associated. Contracts cannot be bundled for thresholds. Limited quantities available. Full eligible SKU list available in Promo Central.

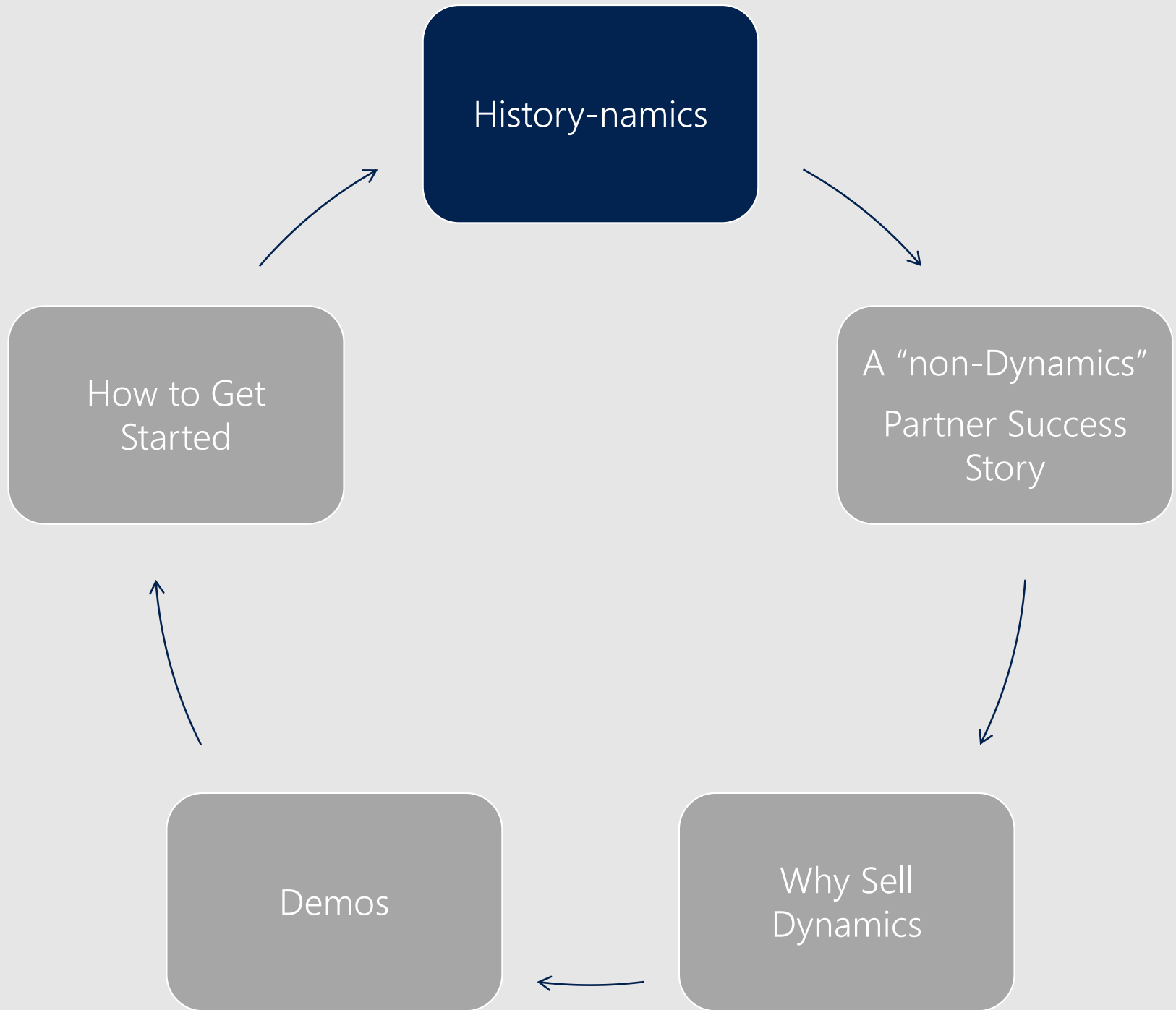


Building a Dynamics 365 Practice

Craig Crescas,
Partner Technology Strategist







History Lesson



Microsoft Business Solutions → Microsoft Dynamics

2001 - 2002

Microsoft
Dynamics
CRM

Microsoft
Dynamics
AX

Microsoft
Dynamics
NAV

Microsoft
Dynamics
GP

Microsoft
Dynamics
SL

2002 – 20xx

“Project
Madeira”

2016 - 2017

Microsoft
Dynamics 365 –
Enterprise edition

Microsoft
Dynamics 365 –
Business edition

2018 - beyond

Customer Engagement



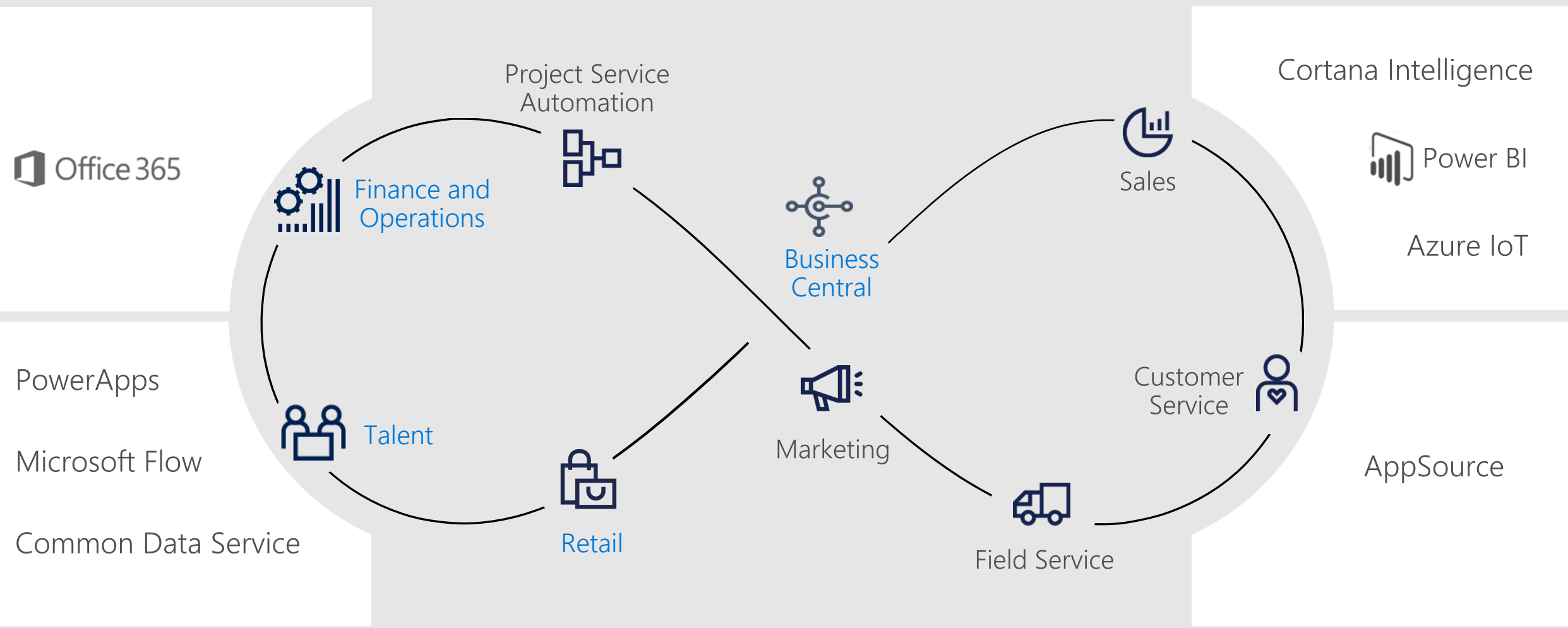
Unified Operations

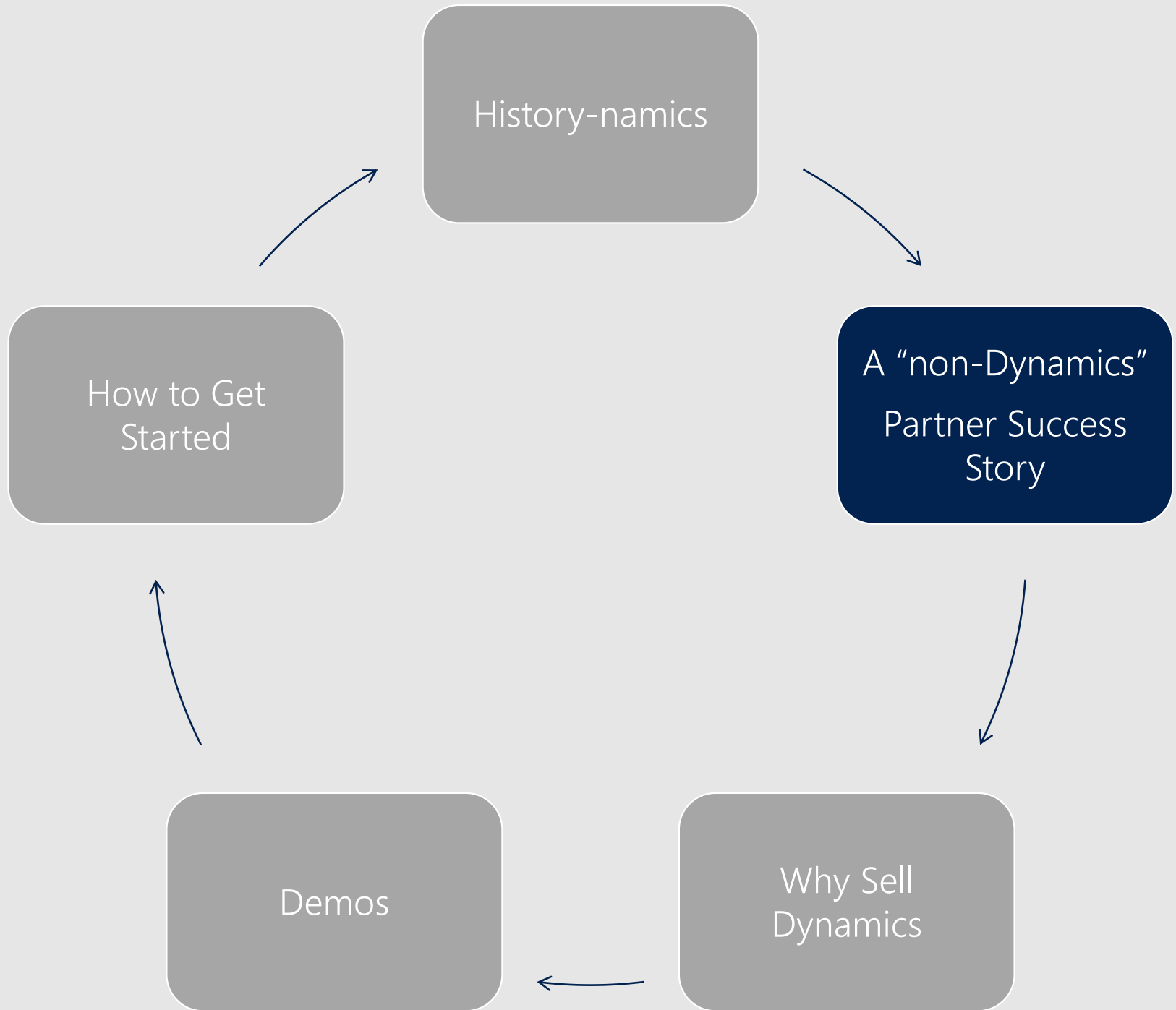


Business Central

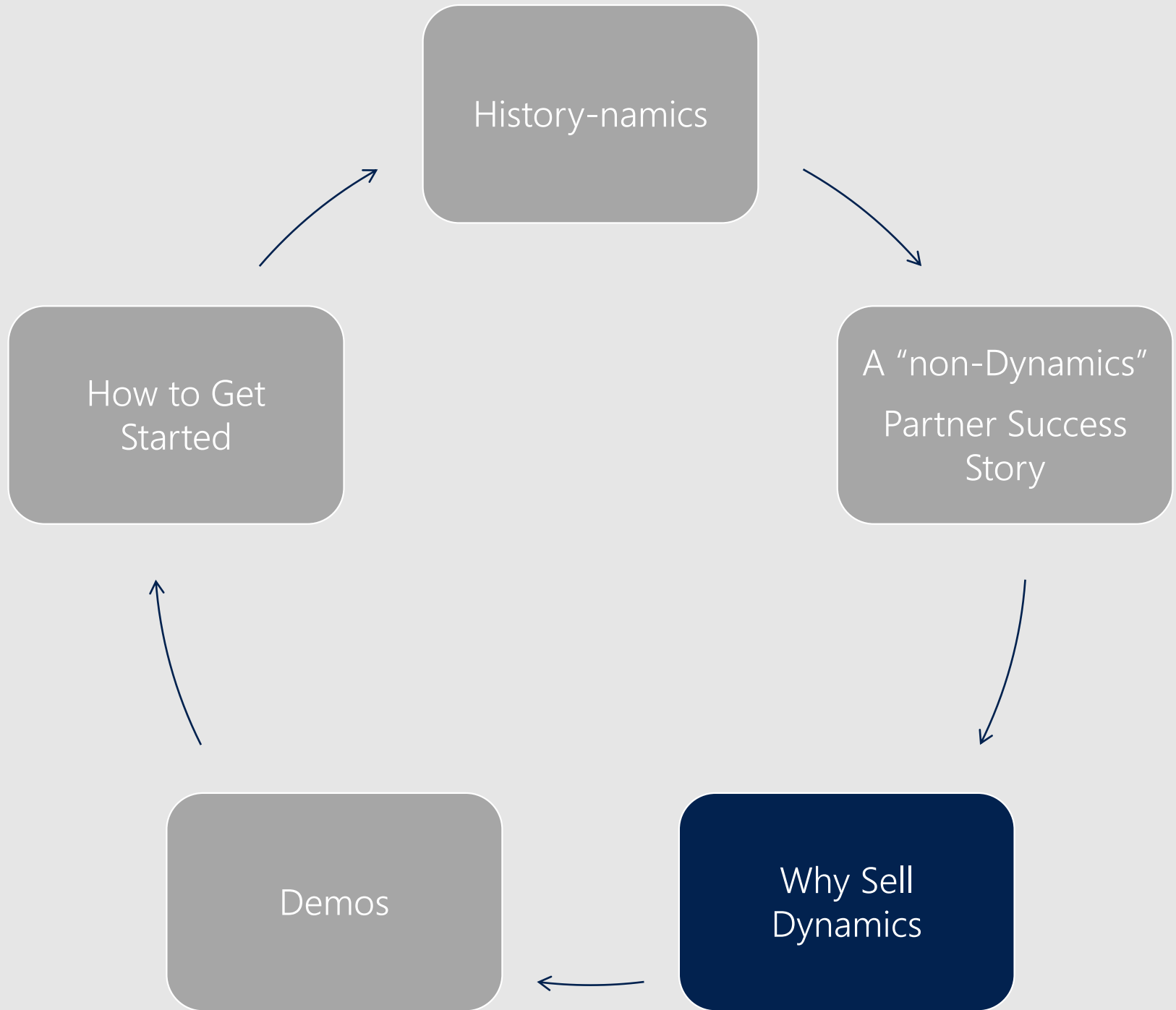


Intelligent Business Applications in the Cloud





Can a non-Dynamics partner
really make it “happen?”



Why Dynamics Now?

Why Sell Dynamics Today

- Market Opportunity is ripe
- Digital Transformation in your customer base
- Selling cloud via cloud simplifies the cycles
- Microsoft resources ensure success, reduce your risk
- Package IP/Services on AppSource
- Compliments your existing offerings

C-SUITE

**EMPOWER
EMPLOYEES**



**ENGAGE
CUSTOMERS**



**OPTIMIZE
OPERATIONS**



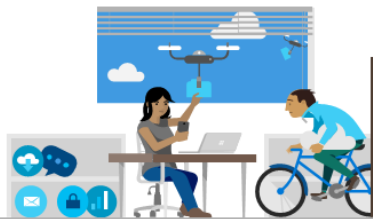
**TRANSFORM
PRODUCTS**



**MODERN
WORKPLACE**



**BUSINESS
APPLICATIONS**



**APPLICATIONS &
INFRASTRUCTURE**

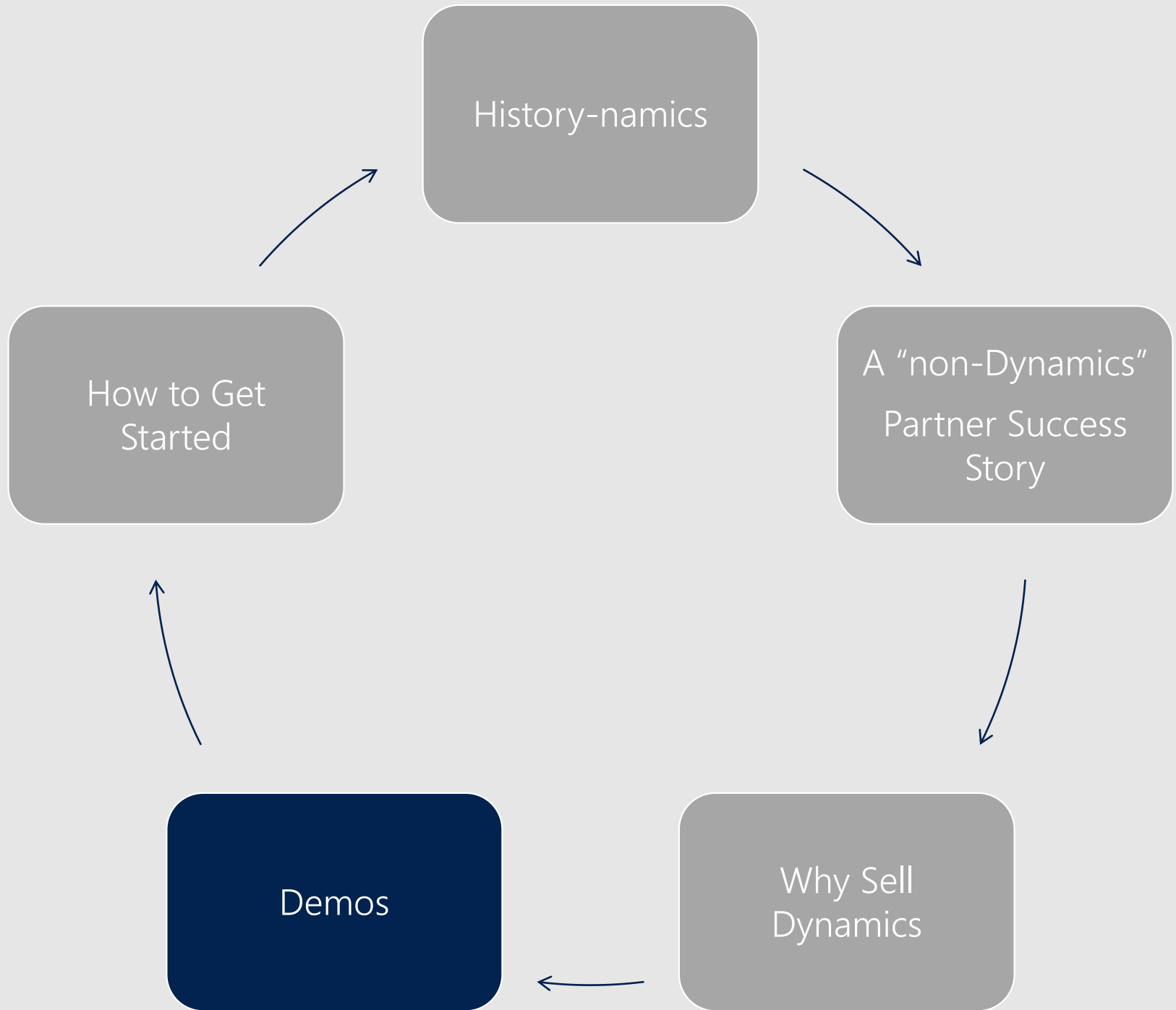


DATA & AI



Trigger Events which drive Emotion/Change

1. A new executive leader arrives
2. Company wants to launch a new product/service
3. Buy a new company
4. Running out of cash, didn't know it
5. Write off inventory
6. Losing (or just lost) a customer
7. No longer profitable, can't identify the leakage



Integrated Demos –

Highlighting Business Central, Sales, Office 365, Artificial Intelligence, and Mobile

Quote to Cash
"email to money"



Enter a sales quote

File Home Send / Receive Folder View Help Tell me what you want to do

Coming Soon Off

New Email New Items Contact Insights New Business Central

Ignore Clean Up Delete Archive Reply Reply All Forward Meeting IM More

Move to: ? To Manager Team Email Done Reply & Delete Create New

Move Rules OneNote

Unread/ Read Categorize Follow Up

New Group Browse Groups

Search People Address Book Filter Email

Read Aloud Get Add-ins MyAnalytics



Search Current Mailbox

Focused Other

Last Week

Robert Townes
Request for a quote on some furniture
Hello MOD, We are planning an office
Fri 9/28

Meagan Bond
Can you remind me how much I owe you?
Hi MOD, I know I owe you money, but I can't
Fri 9/28

Wide World Importers
Thank you for your business! - Invoice 10...
Hello MOD, Here is the invoice for your
Fri 9/28

Sally McArthur
Hello!
Hello MOD, This email is just to introduce
Fri 9/28

Peter Sadow
Discount on Quote S-QUO1001
Hi MOD, I'm working with Trey Research on
Fri 9/28

Clutter 46
Inbox 5
Inbox 3
Sent Items
Drafts [12]

Reply Reply All Forward IM

RT Robert Townes <robert.townes@contoso.com> MOD Administrator

Fri 9/28

Request for a quote on some furniture

Hello MOD,

We are planning an office renovation and need a quote for some new furniture. Can you provide me a quote for the items listed below?

Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

We plan to have renovations completed by the end of June. Can we have the furniture delivered by the third week of June?

Best regards,
Robert

Robert Townes
Adatum Corporation
robert.townes@contoso.com
(701) 555-0151

Adatum Corporation

Items: 5 Unread: 5 This folder is up to date. Connected to: Microsoft Exchange 100%

File Home Send / Receive Folder View Help Tell me what you want to do

Coming Soon [Off]

New Email New Items Contact Insights Ignore Clean Up Delete Archive Reply Reply All Forward Meeting Team Email Reply & Delete Move to: ? To Manager Done Create New Move Rules OneNote Unread/Read Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Read Aloud Get Add-ins MyAnalytics

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Business Central

10000 · Adatum Corporation

Details

0.00	0.00	78,771.10	18,098.30
Balance (\$)	Past Due	LTD Sales	YTD Sales

Aged Accounts Receivable

Period Length: Month | 1 quarter overdue

0

Not Overdue 1M 2M 3M Older

Sell-to Customer Sales History

0	0	2	2	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
33	33	0	0		
Posted Sales Shipments	Posted Sales Invoices				

Open Sales Shipments

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← Posted Sales Shipments Pop Out Refresh

S-SHPT102191 10000	Adatum Corporation
S-SHPT102186 10000	Adatum Corporation
S-SHPT102178 10000	Adatum Corporation
S-SHPT102174 10000	Adatum Corporation
S-SHPT102204 10000	Adatum Corporation
S-SHPT102203 10000	Adatum Corporation
S-SHPT102202 10000	Adatum Corporation
S-SHPT102165 10000	Adatum Corporation
S-SHPT102201 10000	Adatum Corporation



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Business Central

Posted Sales Shipment S-SHPT10219

← Edit Pop Out Refresh

General Show more

No. S-SHPT10219

Customer Adatum Corporation

Contact Robert Townes

Posting Date 3/22/2018

Requested Delivery Date

Promised Delivery Date

Quote No.

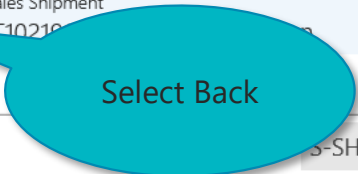
Order No.

Lines

Type	No.	Description	Location
Item	1896-S	ATHENS Desk	
Item	1972-S	MUNICH Swivel Chair, y...	
Item	1996-S	ATLANTA Whiteboard,...	

Shipping Show more

Address Code



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Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts	Posted Sales Credit Memos		

Select +New

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Details

0.00	0.00
Balance (\$)	Past Due

Aged Accounts Receivable ▾

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33	33	0	0		
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts	Posted Sales Credit Memos		

Select Sales Quote

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Ignore Clean Up Delete Archive Reply Reply All Forward Meeting IM More Quick Steps

Move to: ? To Manager Done Create New

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Business Central

Suggested Line Items

We think we've found one or more items that match the criteria you specified. Would you like to add them as line items in the document?

OK Cancel

OK

Add	Item	Quantity
<input checked="" type="checkbox"/>	1908-S LONDON Swivel Chair, blue	7
<input checked="" type="checkbox"/>	1920-S ANTWERP Conference Table	2
<input type="checkbox"/>		

Do not show this message again

Items: 5 Unread: 5

This folder is up to date. Connected to: Microsoft Exchange

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Adatum Corporation

Business Central

S-QUO1003 · Adatum Corporation

General Show more

Customer Name: Adatum Corporation

Contact: Robert Townes

Due Date: 5/9/2018

Requested Delivery Date:

Lines

Type	No.	Description	Location Code
Item	1908-S	LONDON Swivel Chair, blue	
Item	1920-S	ANTWERP Conference Table	

Subtotal Excl. Tax (USD): 2,626.30

Inv. Discount Amount Excl. Tax (USD): 0.00

Invoice Discount %: 0

Total Excl. Tax (USD): 2,626.30

INSIGHT FROM LAST MONTH

The largest posted sales invoice was for \$21,581

ACTIONS

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



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 3, 4, 7. Includes 'Open Quotes' callout bubble.

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

CRONUS <

Customers

INSIGHT FROM

The ATH sold

Activities

Activities

SALES THIS M

\$1,900

> See more

ONGOING SAL

SALES QUOT

3

Sales Quotes

Search + New Manage Process Quote Request Approval Edit In Excel Actions Less options

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUMENT NO.	SELL-TO CONTACT	POSTING DATE	DUE DATE	REQUES... DELIVERY DATE	AMOUNT	LOCATIC CODE
S-QUO1001	20000	Trey Research		Helen Ray	4/2/2018	4/16/2018		1,928.00	
S-QUO1002	40000	Alpine Ski House		Ian Deberry	4/3/2018	5/3/2018		950.50	
S-QUO1003	10000	Alatum Corporation		Robert Townes		5/9/2018		2,626.30	



Open Sales Quote

S-QUO1003 · Adatum Corporation

Process Quote Request Approval | Actions Navigate Report Less options

General

Show more

Customer Name Adatum Corporation Due Date 5/9/2018

Contact Robert Townes Requested Delivery Date

Lines

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY. TO ASSEMBLE TO ORDER	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE
Item	1908-S	LONDON Swivel Chair, blue		7	0	PCS	190.10	FURNITURE
Item	1920-S	ANTWERP Conference Table		2	0	PCS	647.80	FURNITURE

Subtotal Excl. Tax (USD)	<input type="text" value="2,626.30"/>	Total Excl. Tax (USD)	<input type="text" value="2,626.30"/>
Inv. Discount Amount Excl. Tax (...)	<input type="text" value="0.00"/>	Total Tax (USD)	<input type="text" value="157.58"/>
Invoice Discount %	<input type="text" value="0"/>	Total Incl. Tax (USD)	<input type="text" value="2,783.88"/>

Invoice Details >

4/9/2018 1M(8D)

Send via Email

Navigation and Action Bar:

- New:** New Email, New Items, Contact Insights, Business Central
- Delete:** Ignore, Clean Up, Junk, Delete, Archive
- Respond:** Reply, Reply All, Forward, Meeting, IM, More
- Quick Steps:** Move to: (To Manager, Team Email, Reply & Delete), Done, Create New
- Move:** Move, Rules, OneNote
- Tags:** Unread/Read, Categorize, Follow Up
- Groups:** New Group, Browse Groups
- Find:** Search People, Address Book, Filter Email
- Speech:** Read Aloud
- Add-ins:** Get Add-ins, MyAnalytics

Search Current Mailbox | Current Mailbox

Focused | Other | By Date

Last Week

- Robert Townes**
Request for a quote on some furniture | Fri 9/28
Hello MOD, We are planning an office
- Meagan Bond**
Can you remind me how much I owe you? | Fri 9/28
Hi MOD, I know I owe you money, but I can't
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Thank you for your business! - Invoice 10... | Fri 9/28
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Hello! | Fri 9/28
Hello MOD, This email is just to introduce
- Peter Sadow**
Discount on Quote S-QUO1001 | Fri 9/28
Hi MOD, I'm working with Trey Research on

Reply | Reply All | Forward | IM

RT Robert Townes <robert.townes@contoso.com> | 1 | Fri 9/28

Request for a quote on some furniture

Hello MOD,

We are planning an office renovation and need a quote for some new furniture. Can you provide me a quote for the items listed below?

Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

We plan to have renovations completed by the end of June. Can we have the furniture delivered by the third week of June?

Best regards,
Robert

Robert Townes
Adatum Corporation
robert.townes@contoso.com
(701) 555-0151

Adatum Corporation

Business Central

S-QUO1003 · Adatum Corporation

General

Customer Name: Adatum Corporation
Contact: Robert Townes
Due Date: 5/9/2018
Requested Delivery Date:

Lines

Type	No.	Description	Location Code
Item	1908-S	LONDON Swivel Chair, blue	
Item	1920-S	ANTWERP Conference Table	

Subtotal Excl. Tax (USD): 2,626.30
Inv. Discount Amount Excl. Tax (USD): 0.00
Invoice Discount %: 0
Total Excl. Tax (USD): 2,626.30



File Home Send / Receive Folder View Help Tell me what you want to do

Coming Soon [Off]

New Email New Items Contact Insights Ignore Clean Up Delete Archive Reply Reply All Forward Meeting Move to: ? Team Email Reply & Delete To Manager Done Create New Move Rules OneNote Unread/ Read Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Read Aloud Get Add-ins MyAnalytics

Search Current Mailbox Current Mailbox

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Clutter 46
Inbox 5
Drafts 1

Reply Reply All Forward IM

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Adatum Corporation

Business Central

S-QUO1003 · Adatum Corporation

General

Customer Name Adatum Corp

Contact

Due Date

Requested Delivery Date

Lines

Type	No.	Description
Item	1908-S	LONDON Swi
Item	1920-S	ANTWERP Co

Subtotal Excl. Tax (USD)

Inv. Discount Amount Excl. Tax (USD)

Invoice Discount %

Total Excl. Tax (USD)

Process

- Send by Email
- Make Order
- Make Invoice
- Quote
- Attachments
- Dimensions
- Customer
- Contact
- Statistics
- Request Approval
- Approvals
- Send Approval Request
- Cancel Approval Request
- Create a Flow

Send by Email

File Message Insert Options Format Text Review Help Tell me what you want to do

Paste Cut Copy Format Painter Clipboard

Basic Text B I U Bold Italic Underline Text Color Background Color Bulleted List Numbered List Decrease Indent Increase Indent

Names Address Book Check Names

Include Attach File Attach Item Signature

Protection Protect Do Not Forward

Tags Follow Up High Importance Low Importance

Voice Dictate

Business Central Contact Insights New

My Analytics

My Templates View Templates

Send

From admin@MSDIR2018PTSCRAIG.onmicrosoft.com


To Robert Townes <robert.townes@contoso.com>

Cc

Bcc

Subject RE: Request for a quote on some furniture

Attached

 Sales Quote S-QUO1003.pdf
41 KB



Sales Quote S-QUO1003

April 9, 2018
Page 1 / 1

Bill-to Customer No. 10000

Sales Quote

Hello Adatum Corporation,

Sales Quote

S-QU01003



Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

Ship-to Address
Adatum Corporation
Robert Townes
192 Market Square
Atlanta, GA 31772
USA

CRONUS USA, Inc.
7122 South Ashford Street
Westminster
Atlanta, 31772

Document Date
April 9, 2018

Salesperson
Peter Sadow

Payment Terms
1 Month/2% 8 days

Shipment Method

No.	Description	Quantity	Unit	Unit Price	Line Amount
1908-S	LONDON Swivel Chair, blue	7	Piece	190.10	1,330.70
1920-S	ANTWERP Conference Table	2	Piece	647.80	1,295.60
				Subtotal	2,626.30
				Total Tax	157.58
				Total \$	2,783.88

Amount Subject to Sales Tax 2,626.30

Amount Exempt from Sales Tax 0.00

Convert to Invoice

File Home Send / Receive Folder View Help Tell me what you want to do

Coming Soon [Off]

New Email New Items Contact Insights New Ignore Clean Up Delete Archive Reply Reply All Forward Meeting Team Email Reply & Delete Move to: ? To Manager Done Create New Move Rules OneNote Unread/ Read Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Read Aloud Get Add-ins MyAnalytics

Search Current Mailbox Current Mailbox

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Clutter 46
Inbox 4
Inbox 4
Sent Items
Drafts [12]

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Antwerp Conference Table	2

Business Central

Sales Quote S-QUO1003 · Adatum Corporation

General

Customer Name: Adatum Corporation

Contact: Robert Townes

Due Date: 5/9/2018

Requested Delivery Date:

Lines

Type	No.	Description	Location Code
Item	1908-S	LONDON Swivel Chair, bl...	
Item	1920-S	ANTWERP Conference Ta...	

Subtotal Excl. Tax (USD): 2,626.30

Inv. Discount Amount Excl. Tax (USD): 0.00

Invoice Discount %: 0

Total Excl. Tax (USD): 2,626.30

Total Tax (USD): 157.58

Total Incl. Tax (USD): 2,783.88

Invoice Details

Select ...

File Home Send / Receive Folder View Help Tell me what you want to do

Coming Soon Off

New Email New Items Contact Insights Ignore Clean Up Delete Archive Reply Reply All Forward Meeting IM Move to: ? To Manager Team Email Done Reply & Delete Create New Move Rules OneNote Unread/ Read Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Read Aloud Get Add-ins MyAnalytics

Search Current Mailbox Current Mailbox

Focused Other By Date

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Inbox 4
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Drafts 12

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Business Central

Sales Quote S-QUO1003 · Adatum Corporation

General

Customer Name: Adatum Corp
Contact: Robert Townes
Due Date: 5/9/2018
Requested Delivery Date:

Lines

Type	Description
Item	1908-S LONDON Swi
Item	1920-S ANTWERP Co

Subtotal Excl. Tax (USD)
Inv. Discount Amount Excl. Tax (USD)
Invoice Discount %
Total Excl. Tax (USD)
Total Tax (USD)
Total Incl. Tax (USD)

Invoice Details

Process

- Send by Email
- Make Order
- Make Invoice
- Quote
- Attachments
- Dimensions
- Customer
- Contact
- Statistics
- Request Approval
- Approvals
- Send Approval Request
- Cancel Approval Request
- Create a Flow

Make Invoice

File Home Send / Receive Folder View Help Tell me what you want to do

Coming Soon [Off]

New Email New Items Contact Insights New Business Central

Ignore Clean Up Delete Archive Reply Reply All Forward Meeting IM More Quick Steps

Move to: ? To Manager Team Email Done Reply & Delete Create New Move Rules OneNote

Unread/Read Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Read Aloud Get Add-ins MyAnalytics

Search Current Mailbox Current Mailbox

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Item	Quantity
London Swivel Chair	7
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Business Central

Sales Quote S-QUO1003 · Adatum Corporation

General

Customer Name: Adatum Corporation
Contact: Robert Townes
Due Date: 5/9/2018
Requested Delivery Date

Lines

? Do you want to convert the quote to an invoice?

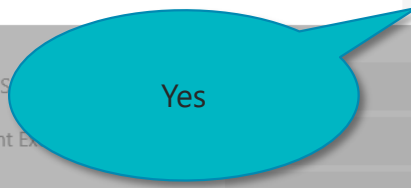
Yes No

Subtotal Excl. Tax (USD) 2,626.30
Inv. Discount Amount Excl. Tax (USD) 0.00
Invoice Discount % 0
Total Excl. Tax (USD) 2,626.30
Total Tax (USD) 157.58
Total Incl. Tax (USD) 2,783.88

Invoice Details

Items: 5 Unread: 4

All folders are up to date. Connected to: Microsoft Exchange



File Home Send / Receive Folder View Help Tell me what you want to do

New Email New Items Contact Insights New Business Central Ignore Clean Up Delete Archive Reply Reply All Forward Meeting IM More Quick Steps Move Rules OneNote Unread/Read Categorize Follow Up New Group Browse Groups Find Speech Add-ins MyAnalytics



Search Current Mailbox Current Mailbox

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Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

Business Central

Sales Invoice S-INV102222 · Adatum Corporation

General Show more

Customer Name Adatum Corporation

Contact Robert Townes

Posting Date 4/9/2018

Due Date 5/9/2018

Lines

Type	No.	Description	Location Code
Item	1908-S	LONDON Swivel Chair, blue	
Item	1920-S	ANTWERP Conference Table	

Subtotal Excl. Tax (USD) 2,626.30

Inv. Discount Amount Excl. Tax (USD) 0.00

Invoice Discount % 0

Total Excl. Tax (USD) 2,626.30

INSIGHT FROM LAST MONTH

Your top customer was School of Fine Art, bought for \$23,102

ACTIONS

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



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

Grid of sales metrics: SALES QUOTES (2), SALES ORDERS (4), SALES INVOICES (8)

ONGOING PURCHASES

Grid of purchase metrics: PURCHASE ORDERS (4), ONGOING PUR... INVOICES (3), PURCH. INVOI... NEXT WEEK (0)

PAYMENTS

Grid of payment metrics: UNPROCESSED PAYMENTS (1), AVERAGE COL... DAYS (5.8)

INCOMING DOCU...

Grid of document metrics: OUTSTANDING... INVOICES (10), MY INCOMING DOCUMENTS (1)



CRONUS

Customers

INSIGHT FROM

You in th

Activities

Activities

SALES THIS M

\$1,90

> See more

ONGOING SAL

SALES QUOT

2

Sales Invoices

Search + New Manage Release Posting Invoice Request Approval Edit In Excel Actions

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUMENT NO.	SELL-TO CONTACT	POSTING DATE	LOCATION CODE	ASSIGNED USER ID	DUE DATE	AM
S-INV102199	10000	Adatum Corporation		Robert Townes	4/4/2018			5/4/2018	10,
S-INV102200	10000	Adatum Corporation		Robert Townes	5/1/2018			6/1/2018	7,
S-INV102201	20000	Trey Research		Helen Ray	4/3/2018			4/17/2018	1,
S-INV102202	30000	School of Fine Art		Meagan Bond	4/5/2018			4/30/2018	2,
S-INV102203	30000	School of Fine Art		Meagan Bond	5/13/2018			5/31/2018	6,
S-INV102204	40000	Alpine Ski House		Ian Deberry	5/1/2018			6/1/2018	
S-INV102205	50000	Relecloud		Jesse Homer	4/2/2018			4/16/2018	7,
S-INV102222	10000	Adatum Corporation		Robert Townes	4/9/2018			5/9/2018	2,

Open Sales Invoice

SALES INVOICE

S-INV102222 · Adatum Corporation

Posting Prepare Invoice Release Request Approval Actions Navigate Less options

General

Customer Name Adatum Corporation Posting Date 4/9/2018

Contact Robert Townes Due Date 5/9/2018

Lines | Manage | More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %
Item	1908-S	LONDON Swivel Chair, blue		7	PCS	190.10	FURNITURE	
Item	1920-S	ANTWERP Conference Table		2	PCS	647.80	FURNITURE	

Subtotal Excl. Tax (USD)	2,626.30	Total Excl. Tax (USD)	2,626.30
Inv. Discount Amount Excl. Tax (...)	0.00	Total Tax (USD)	157.58
Invoice Discount %	0	Total Incl. Tax (USD)	2,783.88

Invoice Details

Post the Invoice

File Home Send / Receive Folder View Help Tell me what you want to do

Coming Soon [Off]

New Email New Items Contact Insights Ignore Clean Up Delete Archive Reply Reply All Forward Meeting Team Email Reply & Delete Move to: ? To Manager Done Create New Move Rules OneNote Unread/Read Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Read Aloud Get Add-ins MyAnalytics

Search Current Mailbox Current Mailbox

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Clutter 46
Inbox 4
Inbox 4
Sent Items
Drafts [12]

Reply Reply All Forward IM

RT Robert Townes <robert.townes@contoso.com> 1- Fri 9/28

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Business Central

Sales Invoice S-INV102222 · Adatum Corporation

General

Customer Name Adatum Corporation

Contact Robert Townes

Posting Date 4/9/2018

Due Date 5/9/2018

Lines

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Item	1908-S	LONDON Swivel Chair, blue	
Item	1920-S	ANTWERP Conference Table	

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Inv. Discount Amount Excl. Tax (USD) 0.00

Invoice Discount % 0

Total Excl. Tax (USD) 2,626.30

Select ...

File Home Send / Receive Folder View Help Tell me what you want to do

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Sales Invoice S-INV102222 · Adatum Corporation

Posting

Customer Name Adatum Corp

Contact

Posting Date 5/9/2018

Due Date

Lines

Type	No.	Description
Item	1908-S	LONDON Swi
Item	1920-S	ANTWERP Co

Subtotal Excl. Tax (USD)

Inv. Discount Amount Excl. Tax (USD)

Invoice Discount %

Total Excl. Tax (USD)

Post

Post and New...

Post and Send...

Test Report...

Prepare

Calculate Invoice Discount

Move Negative Lines...

Invoice

Customer

Dimensions

Attachments

Statistics

Comments

Release

Release

Items: 5 Unread: 4 All folders are up to date. Connected to: Microsoft Exchange 100%

File Home Send / Receive Folder View Help Tell me what you want to do

New Email New Items Contact Insights Ignore Clean Up Junk Delete Archive Reply Reply All Forward Meeting IM More Move to: ? To Manager Team Email Done Reply & Delete Create New Move Rules OneNote Unread/ Read Categorize Follow Up New Group Browse Groups Search People Address Book Filter Email Read Aloud Get Add-ins MyAnalytics

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Focused Other By Date

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Item	Quantity
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Business Central

10000 · Adatum Corporation

Details

2,783.88	0.00	81,397.40	20,724.60
Balance (\$)	Past Due	LTD Sales	YTD Sales

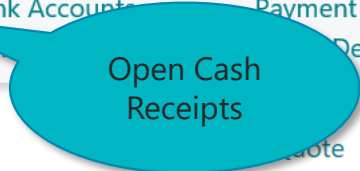
Aged Accounts Receivable

Period Length: Month | 1 quarter overdue

Sell-to Customer Sales History

0	0	2	2	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders	Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
34	34	0	0		
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts	Posted Sales Credit Memos		

Convert to Cash



INSIGHT FROM LAST MONTH

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

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

Activities

Activities

SALES THIS MONTH

\$4,533

> 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

Grid of sales metrics: SALES QUOTES (2), SALES ORDERS (4), SALES INVOICES (7)

ONGOING PURCHASES

Grid of purchase metrics: PURCHASE ORDERS (4), ONGOING PUR... INVOICES (3), PURCH. INVOI... NEXT WEEK (0)

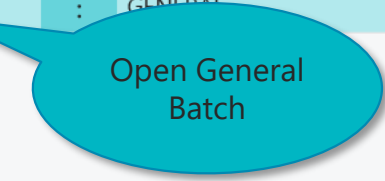
PAYMENTS

Grid of payment metrics: UNPROCESSED PAYMENTS (1), AVERAGE COL... DAYS (5.8), OUTSTANDING... INVOICES (10)

INCOMING DOCU...

Grid of incoming documents: MY INCOMING DOCUMENTS (1)

NAME	DESCRIPTION	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	NO. SERIES	POSTING NO. SERIES	REASON CODE	COPY TAX SETUP TO JNL. LINES	ALLOW TAX DIFFEREN	SUGGEST BALANCII AMOUNT
GENERAL	GENERAL	G/L Account	10100	GJNL-RCPT			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



← CASH RECEIPT JOURNALS

Batch Name: GENERAL

Manage Process Page Actions Navigate Less options

NAME	POSTING DATE	DOCUME... TYPE	DOCUME... NO.	ACCOUNT TYPE	ACCOUNT NO.	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES/)	APPLIES- TO DOC. TYPE
GENERAL	4/9/2018	Payment	G02001	Customer	10000	Adatum Corporation	0.00	0.00	G/L Account	10100	<input type="checkbox"/>	<input type="checkbox"/>



ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	Checking account	0.00	0.00

CRONUS | CASH RECEIPT JOURNALS

GENERAL-GENERAL

Batch Name GENERAL

Manage Process Page Actions Navigate Less options

POSTING DATE	ACCOUNT TYPE	ACCOUNT NO.	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES)	APPLIES-TO DOC. TYPE ↑	APPLIES-TO DOC. NO.	CO...
4/9/2018	Customer	10000	Adatum Corporation	-2,783.88	-2,783.88	Bank Account	CHECKING	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>



ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	World Wide Bank	0.00	0.00

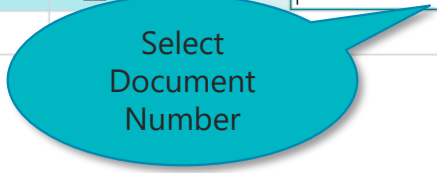
← CASH RECEIPT JOURNALS

GENERAL-GENERAL

Batch Name GENERAL ...

Manage Process Page | Actions Navigate Less options ⓘ ↗

POSTING DATE	ACCOUNT TYPE	ACCOUNT NO.	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES)	APPLIES-TO DOC. TYPE ↑	APPLIES-TO DOC. NO.	CO...
4/9/2018	Customer	10000	Adatum Corporation	-2,783.88	-2,783.88	Bank Accoun	CHECKING	<input type="checkbox"/>	Invoice	<input type="text" value=""/>	<input type="checkbox"/>



ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	World Wide Bank	0.00	0.00

CRONUS I
Cash Flow Fo
Chart of Cas
Cash Receipt
NAME
GENERAL
POSTING DATE
4/9/2018

Actions Navigate

APPLY CUSTOMER ENTRIES - 10000 - ADATUM CORPORATION

GENERAL

Posting Date: 4/9/2018 Currency Code:
 Document Type: Payment Amount: -2,783.88
 Document No.: G02001 Remaining Amount: -2,783.88

POSTING DATE	DOCUME... TYPE ▼	DOCUMENT NO.	CUSTOMER NO. ▼	DESCRIPTION	CURRENCY CODE	REMAINING AMOUNT	APPLN. REMAINING AMOUNT
4/9/2018	Invoice	PS-INV103215	10000	Invoice S-INV102222		2,783.88	2,783.88

APPLN. CURRENCY	AMOUNT TO A...	PMT. DISC. AM...	ROUNDING	APPLIED AMO...	AVAILABLE A...	BALANCE
	2,783.88	-55.68	0.00	2,728.20	-2,783.88	-55.68

OK Cancel



ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	World Wide Bank	0.00	0.00

CRONUS CASH RECEIPT JOURNALS

GENERAL-GENERAL

Batch Name: GENERAL

Manage Process Page **Actions** Navigate Less options

Functions Posting Request Approve



POSTING DATE	ACCOUNT TYPE	ACCOUNT NO.		AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES/)	APPLIES-TO DOC. TYPE ↑	APPLIES-TO DOC. NO.	CO...
4/9/2018	Customer	10000	Adatum Corporation	-2,783.88	-2,783.88	Bank Accoun	CHECKING	<input checked="" type="checkbox"/>	Invoice	PS-INV103215	<input type="checkbox"/>
								<input type="checkbox"/>			<input type="checkbox"/>

ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	World Wide Bank	0.00	0.00

CRONUS CASH RECEIPT JOURNALS

GENERAL-GENERAL

Batch Name GENERAL

Manage Process Page Actions Navigate Less options

Functions Posting Request Approval

- Reconcile
- Test Report...
- Post
- Preview Posting
- Post and Print

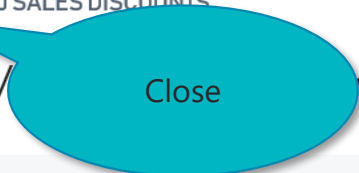
Select Preview Posting

POSTING DATE	ACCT TYPE	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES/NO)	APPLIES-TO DOC. TYPE ↑	APPLIES-TO DOC. NO.	CO...
4/9/2018	Cu	Adatum Corporation	-2,783.88	-2,783.88	Bank Accoun	CHECKING	<input checked="" type="checkbox"/>	Invoice	PS-INV103215	<input type="checkbox"/>
							<input type="checkbox"/>			<input type="checkbox"/>

ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	World Wide Bank	0.00	0.00

40300 SALES DISCOUNTS

G/L view



Search Edit In Excel Navigate Less options

POSTING DATE	DOCUME... TYPE	DOCUMENT NO.	G/L ACCOUNT NO.	DESCRIPTION	GEN. POSTING TYPE	GEN. BUS. POSTING GROUP	GEN. PROD. POSTING GROUP	AMOUNT	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.
4/9/2018	Payment	***	10100	Adatum Corporation				2,783.88	Customer	10000
4/9/2018	Payment	***	10400	Adatum Corporation				-2,839.56	Bank Accou...	CHECKIN
4/9/2018	Payment	***	40300	Adatum Corporation				55.68	G/L Account	

SUGGEST BALANCII AMOUNT

INSIGHT FROM LAST MONTH

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

ACTIONS

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

Activities

Activities

SALES THIS MONTH

\$4,533

> 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

Grid of sales metrics: SALES QUOTES (2), SALES ORDERS (4), SALES INVOICES (7)

ONGOING PURCHASES

Grid of purchase metrics: PURCHASE ORDERS (4), ONGOING PUR... INVOICES (3), PURCH. INVOI... NEXT WEEK (0)

PAYMENTS

Grid of payment metrics: UNPROCESSED PAYMENTS (1), AVERAGE COL... DAYS (5.8), OUTSTANDING... INVOICES (10)

INCOMING DOCU...

Grid of incoming documents: MY INCOMING DOCUMENTS (1)

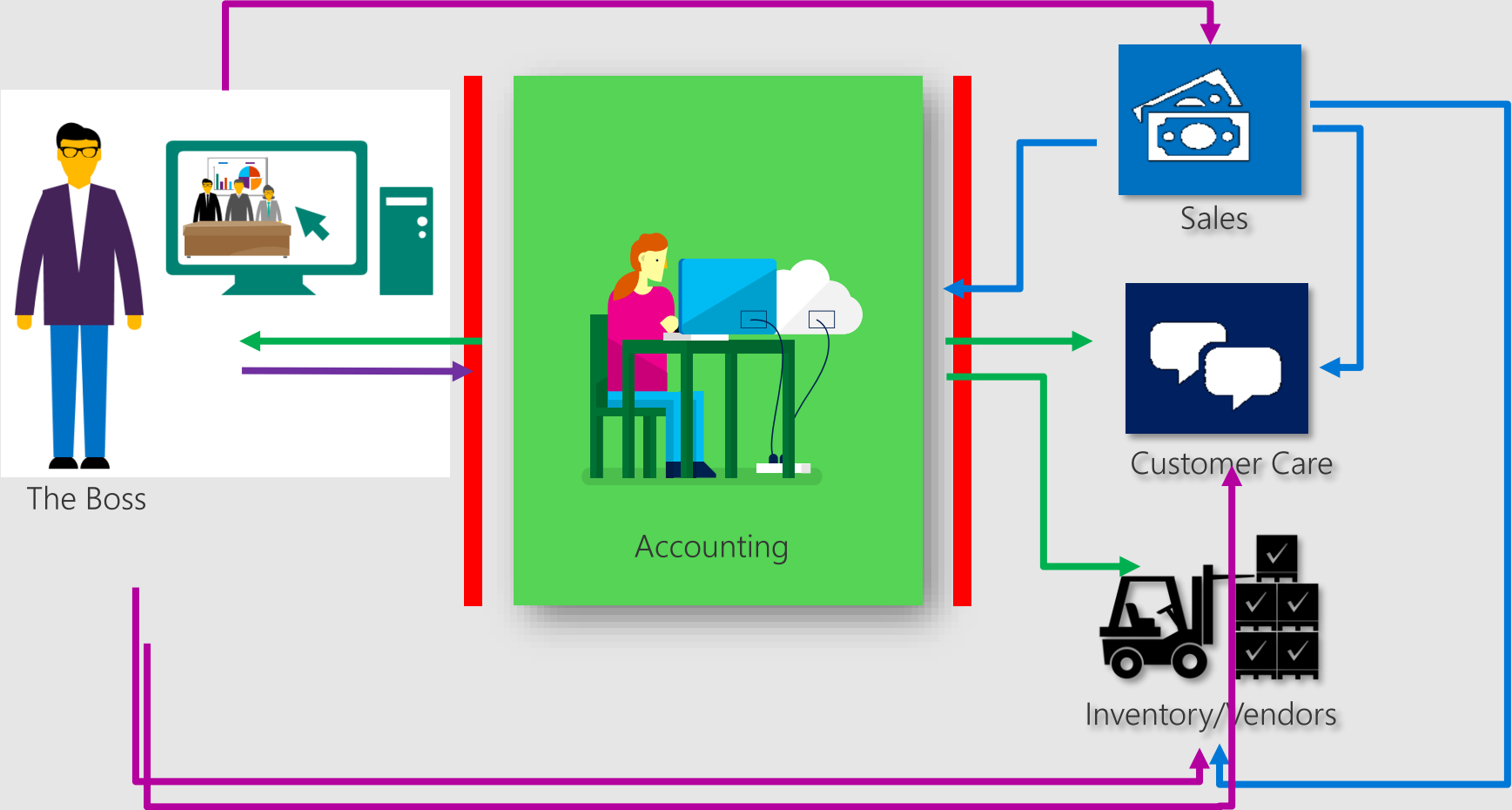


Benefits

- (1) Reduces initial learning of a new system
- (2) Reduces time in data entry process
- (3) Respond quickly to customer requests

Quote to Cash
"sales" to "accounting"

Why the need for Digital Transformation





Create a Sales Quote

Convert Quote to Sales Order

Convert Order to Sales Invoice

Post the Invoice and Send to Sales

Convert to Cash

[Dynamics 365 for Sales]

[Dynamics 365 Business Central]

Create a sales quote



Accounts I Follow

Search for records

Account Name	Primary Contact	Address 1: City	Address 1: Stat...	Main Phone	Email (Primary Contact)	Status
Adatum Corporation	Robert Townes	Atlanta	GA	---	---	Active
Alpine Ski House	...	Atlanta	GA	---	---	Active
Relecloud	Jesse Horner	Atlanta	GA	---	---	Active
School of Fine Art	Megan Bond	Miami	FL	---	---	Active
Trey Research	Helen Ray	Chicago	IL	---	---	Active



All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 5 of 5 (0 selected)



Account: Account Adatum Corporation

Annual Revenue --- Number of Employees ---

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Service Scheduling Related

ACCOUNT INFORMATION

Account Name	* Adatum Corporation
Phone	---
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Predict Validation Grade	---

Predict Scores

No data available

Timeline

Enter a note...

TODAY

- Order closed by MOD Administrator - 2 Hours ago
- Quote closed by MOD Administrator - 2 Hours ago
Quote Won (Won) - QUO-01000-Q0D2H5
- Auto-post on Office Remodel for Adatum's wall - Today 1:53 PM
Opportunity: Created by MOD Administrator for Account Adatum Corporation.
- Auto-post on Incomplete Shipment of Chairs's wall - Today 1:44 PM

Like | Reply | ...

Primary Contact [Robert Townes](#)

Dynamics 365 Business Central Account Statistics

Business Central Customer No.	10000
Balance	\$0.00
Modified On	10/15/2018 10:38 PM

Sales

Outstanding Orders	\$20,196.08
Shipped Not Invd.	\$0.00
Outstanding Invoices	\$19,184.20

Service

Account: Account
Adatum Corporation

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Ser

ACCOUNT INFORMATION

Account Name *	Adatum Corporation
Phone	---
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Predict Validation Grade	---

Predict Scores Search ...

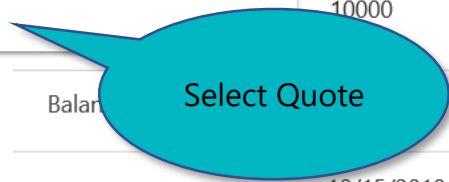
Timeline

Enter a note...

TODAY

- Order closed by MOD Administrator - 2 Hours ago
- Quote closed by MOD Administrator - 2 Hours ago
Quote Won (Won) - QUO-01000-Q0D2H5
- Auto-post on Office Remodel for Adatum's wall - Today 1:53 PM
Opportunity: Created by MOD Administrator for Account Adatum Corporation.
Like Reply ...
- Auto-post on Incomplete Shipment of Chairs's wall - Today 1:44 PM

- Activities >
- Account
- Case
- Category
- Competitor
- Contact
- Knowledge Article
- Lead
- Opportunity
- Property Option Set Item
- Quote



Robert Townes

al Account Statistics

Balance	10000
Modified On	10/15/2018 10:38 PM

Sales

Outstanding Orders	\$20,196.08
Shipped Not Invd.	\$0.00
Outstanding Invoices	\$19,184.20

Service

Account: Account Adatum Corporation

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Service

ACCOUNT INFORMATION

Account Name *	Adatum Corporation
Phone	---
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Predict Validation Grade	---

Predict Scores Search

Timeline

Enter a note...

TODAY

- Order closed by MOD Administrator - 2 Hours ago
- Quote closed by MOD Administrator - 2 Hours ago
- Quote Won (Won) - QUO-01000-Q0D2H5**
- Auto-post on Office Remodel for Adatum's wall - Today 1:53 PM
- Opportunity: Created by MOD Administrator for Account Adatum Corporation.
- Auto-post on Incomplete Shipment of Chairs's wall - Today 1:44 PM

Quick Create: Quote

Summary

Name *

Currency * US Dollar

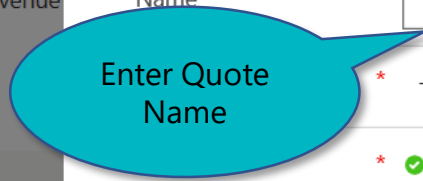
Price List * ---

Sales Information

Opportunity ---

Description ---

Save Save & Create New



Account: Account Adatum Corporation

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Service

ACCOUNT INFORMATION

Account Name * Adatum Corporation

Phone ---

Fax ---

Website ---

Parent Account ---

Ticker Symbol ---

Predict Validation Grade ---

Predict Scores Search

No data available

Timeline

Enter a note...


TODAY

- Order closed by MOD Administrator - 2 Hours ago
- Quote closed by MOD Administrator - 2 Hours ago
Quote Won (Won) - QUO-01000-Q0D2H5
- Auto-post on Office Remodel for Adatum's wall - Today 1:53 PM
Opportunity: Created by MOD Administrator for Account Adatum Corporation.
- Auto-post on Incomplete Shipment of Chairs's wall - Today 1:44 PM

Summary

Name * Quote for Chairs for Adatum

Potential Customer *

Owner * 

Currency * US Dollars

Price List * ---

Sales Information

Opportunity ---

Description ---

Account: Account
Adatum Corporation

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Service

ACCOUNT INFORMATION

Account Name *	Adatum Corporation
Phone	---
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Predict Validation Grade	---

Predict Scores Search ...

Timeline

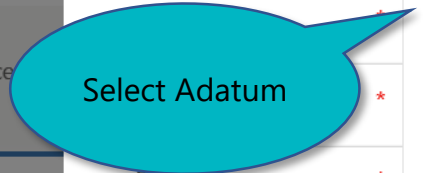
Enter a note...

TODAY

- Order closed by **MOD Administrator** - 2 Hours ago
- Quote closed by **MOD Administrator** - 2 Hours ago
Quote Won (Won) - QUO-01000-Q0D2H5
- Auto-post on **Office Remodel for Adatum's** wall - Today 1:53 PM
Opportunity: Created by **MOD Administrator** for Account **Adatum Corporation**.
- Auto-post on **Incomplete Shipment of Chairs's** wall - Today 1:44 PM

Summary

Name *	Quote for Chairs for Adatum
Potential Customer *	<input type="text" value="Look for Records"/>
	<ul style="list-style-type: none">Adatum CorporationTrey ResearchAlpine Ski HouseJesse HornerRelecloudHelen Ray
Price List *	
Sales Information	
Opportunity	
Description	---



Dynamics 365 Sales Hub Sales > Accounts > Adatum Corporation

Account: Account Adatum Corporation

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Service

ACCOUNT INFORMATION

Account Name *	Adatum Corporation
Phone	---
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Predict Validation Grade	---

Predict Scores Search

Timeline

Enter a note...

TODAY

- Order closed by MOD Administrator - 2 Hours ago
- Quote closed by MOD Administrator - 2 Hours ago
Quote Won (Won) - QUO-01000-Q0D2H5
- Auto-post on Office Remodel for Adatum's wall - Today 1:53 PM
Opportunity: Created by MOD Administrator for Account Adatum Corporation.
- Auto-post on Incomplete Shipment of Chairs's wall - Today 1:44 PM

Quick Create: Quote

Summary

Name *	Quote for Chairs for Adatum
Potential Customer *	Adatum Corporation
Owner *	MOD Administrator
Currency *	US Dollar
Price List *	Look for Price List

Sales Information

Opportunity

Basic Reseller US Dollar	▼
Business Central Default Price List US Dollar	▼
CRM Service USA (sample) US Dollar	▼
France Bill Rates	

Change View



Save Save & Create New

Dynamics 365 Sales Hub Sales > Accounts > Adatum Corporation

Account: Account Adatum Corporation

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Service

ACCOUNT INFORMATION

Account Name *	Adatum Corporation
Phone	---
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---
Predict Validation Grade	---

Predict Scores Search

Timeline

Enter a note...

TODAY

- Order closed by MOD Administrator - 2 Hours ago
- Quote closed by MOD Administrator - 2 Hours ago
Quote Won (Won) - QUO-01000-Q0D2H5
- Auto-post on Office Remodel for Adatum's wall - Today 1:53 PM
Opportunity: Created by MOD Administrator for Account Adatum Corporation.
Like Reply
- Auto-post on Incomplete Shipment of Chairs's wall - Today 1:44 PM

Quick Create: Quote

Summary

Name *	Quote for Chairs for Adatum
Potential Customer *	Adatum Corporation
Owner *	MOD Administrator
Currency *	US Dollar
Price List *	Business Central Default Price List

Sales Information

Opportunity	---
Description	---

Save

Save Save & Create New

Account: Account Adatum Corporation

Annual Revenue --- Number of Employees ---

Summary Versium Predict Insights LinkedIn Company Profile General Partner Program Project Price Lists Details Field Service Scheduling Related

ACCOUNT INFORMATION

Account Name * Adatum Corporation

Phone ---

Fax ---

Website ---

Parent Account ---

Ticker Symbol ---

Predict Validation Grade ---

Predict Scores Search ...

No data available

Timeline

Enter a note...

TODAY

- Order closed by MOD Administrator - 2 Hours ago
- Quote closed by MOD Administrator - 2 Hours ago
Quote Won (Won) - QUO-01000-Q0D2H5
- Auto-post on Office Remodel for Adatum's wall - Today 1:53 PM
- Opportunity: Created by MOD Administrator for Account Adatum Corporation.

Your changes were saved. View Record

Primary Contact [Robert Townes](#)

Dynamics 365 Business Central Account Statistics

Dynamics 365 Business Central Customer No.	10000
Balance	\$0.00
Modified On	10/15/2018 10:38 PM

Sales

Outstanding Orders	\$20,196.08
Shipped Not Invd.	\$0.00
Outstanding Invoices	\$19,184.20

Service



Your changes were saved. View Record

Quote: Quote Quote for Chairs for Adatum

Total Amount \$0.00

Effective From ---

Summary Details Related

Quote ID	* QUO-01002-K4K9J9
Revision ID	* 0
Name	* Quote for Chairs for Adatum
Currency	* US Dollar
Price List	* Business Central Default...

PRODUCTS

Group By: (no grouping)

✓ | Prod... | Pro... | Price... | Qua... | Dis... |

No data available.

Page 1

SALES INFORMATION

Adatum Corporation

SHIPPING INFORMATION

Shipping Method ---

Payment Terms ---

Freight Terms ---

Detail Amount	\$0.00
(-) Discount (%)	---
(-) Discount	---

DESCRIPTION



Quote: Quote Quote for Chairs for Adatum

Total Amount \$0.00

Effective From

Summary Details Related

Quote ID	* QUO-01002-K4K9J9
Revision ID	* 0
Name	* Quote for Chairs for Adatum
Currency	* US Dollar
Price List	* Business Central Default...

PRODUCTS

Group By: (no grouping)

✓ | Prod... | Pro... | Price... | Qua... | Dis..

No data available.

Page 1

SALES INFORMATION

DESCRIPTION

- + Add New Quote Line
- Refresh
- Export Quote Lines
- Show As



SHIPPING INFORMATION

Shipping Method	---
Payment Terms	---
Freight Terms	---

Detail Amount	\$0.00
(-) Discount (%)	---
(-) Discount	---

Quote Line: Information
New Quote Line

General Delivery Address

Select Product	<input checked="" type="checkbox"/> Existing	Unit	---
Existing Product *	---	* A required field cannot be empty.	



Pricing			
Pricing	<input checked="" type="checkbox"/> Use Default		
Price Per Unit	---		
Volume Discount	---		
Quantity *	---	Quote	* Quote for Chairs for Adatum
Amount	---		

Quote Line: Information
New Quote Line

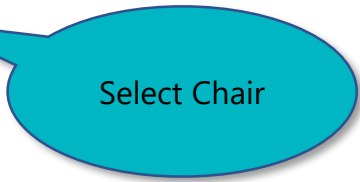
General Delivery Address

Select Product Existing

Existing Product * Look for Product

- BERLIN Guest Chair, yellow \$192.80
- Conference Bundle 1-6 \$188.80
- Conference Bundle 1-8 \$233.80
- Conference Bundle 2-8 \$233.80

Change View



Unit * ---
⊗ A required field cannot be empty.

Pricing

Price Per Unit

Volume Discount ---

Quantity * ---

Amount ---

Quote * Quote for Chairs for Adatum

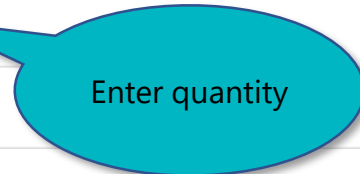
Quote Line: Information
New Quote Line

General Delivery Address

Select Product	<input checked="" type="checkbox"/> Existing	Unit	* PCS
Existing Product	* BERLIN Guest Chair, yellow		

Pricing

Pricing	<input checked="" type="checkbox"/> Use Default		
Price Per Unit	\$192.80		
Volume Discount	---		
Quantity	* ---	Quote	* Quote for Chairs for Adatum
Amount	---		
Manual Discount	---		





Save

General Delivery Address

Select Product	<input checked="" type="checkbox"/> Existing	Unit	* PCS
Existing Product	* BERLIN Guest Chair, yellow		

Pricing

Pricing	<input checked="" type="checkbox"/> Use Default		
Price Per Unit	\$192.80		
Volume Discount	---		
Quantity	* 5.00000	Quote	* Quote for Chairs for Adatum
Amount	---		
Manual Discount	---		

Quote: Quote
Quote for Chairs for Adatum

Total Amount \$964.00 Effective From ---



Summary Details Related

Quote ID	* QUO-01002-K4K9J9
Revision ID	* 0
Name	* Quote for Chairs for Adatum
Currency	* US Dollar
Price List	* Business Central Default...

PRODUCTS

Group By: (no grouping)

	Prod...	Pro...	Price...	Qua...	Dis...
>	BER...	Not C...	\$192.80	5.00000	---

Page 1

SALES INFORMATION

Opportunity	---
Potential Customer	* Adatum Corporation

SHIPPING INFORMATION

Shipping Method	---
Payment Terms	---
Freight Terms	---

Detail Amount	\$964.00
(-) Discount (%)	---
(-) Discount	---
Pre-Freight Amount	\$964.00

DESCRIPTION

DESCRIPTION	---
-------------	-----

Quote: Quote
Quote for Chairs for Adatum
 Read only

Total Amount: \$964.00
 Effective From: ---

Summary Details Related

Quote ID	* QUO-01002-K4K9J9
Revision ID	* 0
Name	* Quote for Chairs for Adatum
Currency	* US Dollar
Price List	* Business Central Default...

PRODUCTS Refresh

Group By: (no grouping)

✓ | Prod... | Pro... | Price... | Qua... | Dis... |

>	BER...	Not C...	\$192.80	5.00000	---
---	--------	----------	----------	---------	-----

Page 1

SALES INFORMATION

Opportunity: ---

Potential Customer * Adatum Corporation

SHIPPING INFORMATION

Shipping Method: ---

Payment Terms: ---

Freight Terms: ---

Detail Amount	\$964.00
(-) Discount (%)	---
(-) Discount	---
Pre-Freight Amount	\$964.00

DESCRIPTION ---

Convert quote to an order

Quote: Quote
Quote for Chairs for Adatum
Read only



Total Amount \$964.00 Effective From ---

Summary Details Related

Quote ID	* QUO-01002-K4K9J9
Revision ID	* 0
Name	* Quote for Chairs for Adatum
Currency	* US Dollar
Price List	* Business Central Default...

PRODUCTS Refresh

Group By: (no grouping)

Prod... | Pro... | Price... | Qua... | Dis...

>	BER...	Not C...	\$192.80	5.00000	---
---	--------	----------	----------	---------	-----

Page 1

SALES INFORMATION

Opportunity ---

Potential Customer * Adatum Corporation

SHIPPING INFORMATION

Shipping Method ---

Payment Terms ---

Freight Terms ---

Detail Amount	\$964.00
(-) Discount (%)	---
(-) Discount	---
Pre-Freight Amount	\$964.00

DESCRIPTION ---

Quote: Quote
Quote for Chairs for Adatum
Read only

Total Amount \$964.00 Effective From ---

Summary Details Related

Quote ID	* QUO-01002-K4K9J9
Revision ID	* 0
Name	* Quote for Chairs for Adatum
Currency	* US Dollar
Price List	* Business Central Default...

SHIPPING INFORMATION	
Shipping Method	---
Payment Terms	---
Freight Terms	---

SALES INFORMATION	
Opportunity	---
Potential Customer	* Adatum Corporation

DESCRIPTION	

Create Order [X]

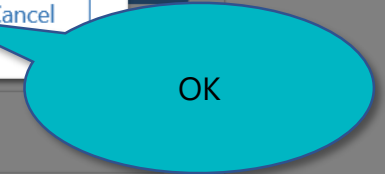
Use this quote to create an order.

Status Reason * Won

Date Won * 10/16/2018 [Calendar Icon]

Description ---

[OK] [Cancel]



(-) Discount (%)	---
(-) Discount	---
Pre-Freight Amount	\$964.00

Order: Order
Quote for Chairs for Adatum
 Read only

Total Amount: \$964.00
 Status: Submitted

Summary | Details | Related

Order ID	* ORD-01001-R5T3G5
Name	* Quote for Chairs for Adatum
Currency	* US Dollar
Price List	* Business Central Default...
Prices Locked	* No

PRODUCTS Refresh

✓	Price Pe...	Quantity	Item Availability ↑↓	Disco...	Extended
	\$192.80	5.00000	100.000	---	\$96

SALES INFORMATION

Opportunity	---
Quote	Quote for Chairs for Adatum
Potential Customer	* Adatum Corporation

SHIPPING DATES

Requested Delivery	---	
Date Fulfilled	---	

Detail Amount	\$964.00
(-) Discount (%)	---
(-) Discount	---
Pre-Freight Amount	\$964.00
(+) Freight Amount	---

DESCRIPTION ---

SHIPPING INFORMATION

Convert order to an invoice



Show Chart + New

Email a Link

Flow

Export to Excel

Import from Excel

Open Dashboards

Select Dynamics 365

Accounts I Follow

Search for records

Account Name	Primary Contact	Address 1: City	Address 1: Stat...	Main Phone	Email (Primary Contact)	Status
Adatum Corporation	Robert Townes	Atlanta	GA	---	---	Active
Alpine Ski House	Ian Deberry	Atlanta	GA	---	---	Active
Relecloud	Jesse Horner	Atlanta	GA	---	---	Active
School of Fine Art	Megan Bond	Miami	FL	---	---	Active
Trey Research	Helen Ray	Chicago	IL	---	---	Active

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 5 of 5 (0 selected)

- My apps
- Home
- Dynamics 365 — custom
- Sales Hub
- Dynamics 365 App for Ou...
- Sales
- Customer Service
- Customer Service Hub
- Project Resource Hub
- Project Service Automation
- Field Service
- Field Resource Hub
- Voice of the Customer
- Dynamics 365 Portals
- Email in Unified Interface
- Social Selling Assistant
- Business Central
- Customer Service Hub Contoso
- Sales Hub Contoso
- Get more apps

Follow

Search for records

Primary Contact	Address 1: City	Address 1: Stat...	Main Phone	Email (Primary Contact)	Status
Robert Townes	Atlanta	GA	---	---	Active
Ian Deberry	Atlanta	GA	---	---	Active
Jesse Horner	Atlanta	GA	---	---	Active
Megan Bond	Miami	FL	---	---	Active
Helen Ray	Chicago	IL	---	---	Active

F G H I J K L M N O P Q R S T U V W X Y Z

Select Business Central

INSIGHT FROM LAST MONTH

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

ACTIONS

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

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 6

SALES INVOICES

ONGOING PURCHASES

PURCHASE ORDERS

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





Sales Orders

Search + New Manage Process Report Request Approval Order Edit In Excel More options

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUMENT NO.	DOCUME... DATE	AMOUNT	INCLI
S-ORD1010...	10000	Adatum Corporation		4/2/2018	16,767.60	
S-ORD1010...	10000	Adatum Corporation		5/1/2018	2,285.30	
S-ORD1010...	30000	School of Fine Art		4/22/2018	5,182.40	
S-ORD1010...	40000	Alpine Ski House		5/13/2018	570.30	
S-ORD1010...	10000	Adatum Corporation	QUOTE FO...	10/16/2018	964.00	
S-ORD1010...	10000	Adatum Corporation	QUOTE FO...	10/16/2018	964.00	



Customer Statistics

Customer No.	10000
Balance (\$)	0.00
SALES	
Outstanding Orders (\$)	22,239.76
Shipped Not Invd. (\$)	0.00
Outstanding Invoices (\$)	19,184.20
Total (\$)	41,423.96
Credit Limit (\$)	0.00
Overdue Amounts (\$) as of 0...	0.00
Total Sales (\$)	60,672.80
Invoiced Prepayment Amoun...	0.00

Customer Details

Customer No.	10000
Phone No.	
Email	robert.townes@contoso.com
Fax No.	
Credit Limit (\$)	0.00

CRONUS
Customers
ATH sold
Activities
Activities
SALESTHISM
\$1,900
> See more
ONGOING SAL
SALES QUOT
2
MY USER TASK
PENDING US
TASKS
0

SALES ORDER

S-ORD101006 · Adatum Corporation

Process Report Posting Request Approval Actions Navigate Report Less options

Post... Post and N... Post and Send...

General

Post

Show more

Customer Name	Adatum Corporation	Due Date	11/16/2018
Contact	Robert Townes	Requested Deliver...	
Posting Date	10/16/2018	External Document...	QUOTE FOR CHAIRS FOR AD.
Order Date	10/16/2018		

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1936-S	BERLIN Guest Chair, yellow		5

Subtotal Excl. Tax (...)	964.00	Total Excl. Tax (USD)	964.00
Inv. Discount Amou...	0.00	Total Tax (USD)	57.84
Invoice Discount %	0	Total Incl. Tax (USD)	1,021.84

Sell-to Customer Sales History

0	0	4
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
2	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
33	33	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		
Posted Sales Credit Memos		

Customer Details

Customer No. 10000
 Phone No.
 Email robert.townes@contoso.com
 Fax No.

SALES ORDER

S-ORD101006 · Adatum Corporation

Process Report Posting Request Approval Actions Navigate Report Less options

Post... Post and New... Post and Send...

General

Customer Name: Adatum Corporation Due Date: 11/16/2018
Contact: Robert Townes
Posting Date: 10/16/2018
Order Date: 10/16/2018

Sell-to Customer Sales History

0	0	4
2	0	0
33	33	0
		Posted Sales Return Receipts

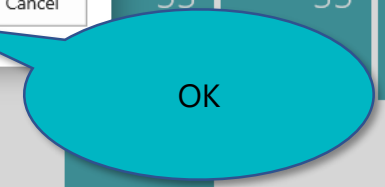
Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1936-S	BERLIN Guest Chair, yellow		5

Subtotal Excl. Tax (...)	964.00	Total Excl. Tax (USD)	964.00
Inv. Discount Amou...	0.00	Total Tax (USD)	57.84
Invoice Discount %	0	Total Incl. Tax (USD)	1,021.84

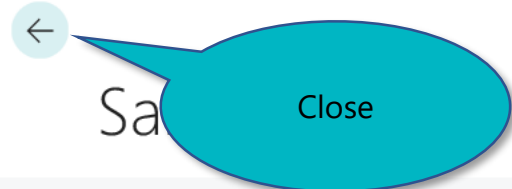
i Ship
 Invoice
 Ship and Invoice

OK Cancel



Customer Details

Customer No. 10000
Phone No.
Email robert.townes@contoso.com
Fax No.



Search + New Manage Process Report Request Approval Order Edit In Excel More options

NO.	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUMENT NO.	DOCUME... DATE	AMOUNT	INCLI
S-ORD1010...	10000	Adatum Corporation		4/2/2018	16,767.60	
S-ORD1010...	10000	Adatum Corporation		5/1/2018	2,285.30	
S-ORD1010...	30000	School of Fine Art		4/22/2018	5,182.40	
S-ORD1010...	40000	Alpine Ski House		5/13/2018	570.30	
S-ORD1010...	10000	Adatum Corporation	QUOTE FO...	10/16/2018	964.00	

Customer Statistics

Customer No.	10000
Balance (\$)	1,021.84
SALES	
Outstanding Orders (\$)	21,217.92
Shipped Not Invd. (\$)	0.00
Outstanding Invoices (\$)	19,184.20
Total (\$)	41,423.96
Credit Limit (\$)	0.00
Overdue Amounts (\$) as of 0...	0.00
Total Sales (\$)	61,636.80
Invoiced Prepayment Amoun...	0.00

Customer Details

Customer No.	10000
Phone No.	
Email	robert.townes@contoso.com
Fax No.	
Credit Limit (\$)	0.00

INSIGHT FROM LAST MONTH

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

ACTIONS

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

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: 5, 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

Send the invoice to Sales

- Customers
- Sales Quotes
- Sales Invoices
- Reminders
- Posted Sales Credit Memos
- Issued Finance Charge Memos
- Items
- Sales Orders
- Sales Credit Memos
- Finance Charge Memos
- Posted Sales Return Receipts
- Item Charges
- Blanket Sales Orders
- Sales Return Orders
- Posted Sales Invoices
- Issued Remittances

Your top customer was School of Fine Art, bought for \$23,102



Open Posted Sales Invoices

- + Purchase Order
- + Purchase Invoice
- + New Sales Invoice
- > 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 5	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

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Approvals

Self-Service

Setup & Extensions

Intelligent Cloud Insights

Posted Sales Invoices:

All

adatum

Delete Invoice

Correct

Edit In Excel

Actions

Navigate

Less options

NO.	CUSTOMER NO.	CUSTOMER	CURRENCY CODE	DUE DATE	AMOUNT	AMOUNT INCLUDING TAX	REMAINING AMOUNT	LOCATION CODE	NO. PRINTED	CLOS...	CANC...	CORR...	CO... TO DYNA 365
PS-INV1032...	10000	Adatum Corporation		11/16/2018	964.00	1,021.84	1,021.84		0	No			<input checked="" type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		3/22/2018	20,359.40	21,580.96	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		3/18/2018	964.00	1,021.84	0.00		0	Yes			<input type="checkbox"/>
PS-INV1032...	10000	Adatum Corporation		3/14/2018	233.80	247.83	0.00		0	Yes			<input type="checkbox"/>
PS-INV1032...	10000	Adatum Corporation		3/4/2018	2,893.40	3,067.00	0.00		0	Yes			<input type="checkbox"/>
PS-INV1032...	10000	Adatum Corporation		2/25/2018	251.60	266.70	0.00		0	Yes			<input type="checkbox"/>
PS-INV1032...	10000	Adatum Corporation		2/20/2018	2,571.80	2,726.11	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		2/20/2018	16,770.40	17,776.62	0.00		0	Yes			<input type="checkbox"/>
PS-INV1032...	10000	Adatum Corporation		2/19/2018	1,402.80	1,486.97	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		2/18/2018	1,709.00	1,811.54	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		2/16/2018	771.20	817.47	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		1/22/2018	11,974.20	12,692.65	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		1/18/2018	771.20	817.47	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		12/31/2017	2,794.60	2,962.28	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		12/21/2017	3,192.50	3,384.05	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		12/18/2017	385.60	408.74	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		11/20/2017	10,551.00	11,184.06	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		10/22/2017	10,973.40	11,631.80	0.00		0	Yes			<input type="checkbox"/>
PS-INV1031...	10000	Adatum Corporation		10/18/2017	578.40	613.10	0.00		0	Yes			<input type="checkbox"/>

Open Posted Sales Invoice

POSTED SALES INVOICE

PS-INV103215 · Adatum Corporation

Invoice Correct | Actions [Navigate](#) Less options

Invoice Dynamics 365 for Sales



General

No.	PS-INV103215	Due Date	11/16/2018
Customer	Adatum Corporation	Quote No.	
Contact	Robert Townes	Order No.	S-ORD101006
Posting Date	10/16/2018	Closed	No

Lines	Manage	More options							
TYPE	NO.	DESCRIPTION	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	E	
Item	1936-S	BERLIN Guest Chair, yellow	5	PCS	192.80	FURNITURE			

Invoice Discount Amount Excl. Tax	0.00	Total Tax (USD)	57.84
Total Excl. Tax (USD)	964.00	Total Incl. Tax (USD)	1,021.84

Invoice Details

Currency Code	...	Department Code	
---------------	-----	-----------------	--

PS-INV103215 · Adatum Corporation

Invoice Correct | Actions [Navigate](#) Less options

Invoice ▾ [Dynamics 365 for Sales](#) ▾

No.	Due Date	11/16/2018
Customer		
Contact		S-ORD101006
Posting Date	10/16/2018	No

- Invoice
- Create Invoice in Dynamics 365 for Sales
- Synchronization Log



TYPE	NO.	DESCRIPTION	QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX GROUP CODE	LINE DISCOUNT %	E
Item	1936-S	BERLIN Guest Chair, yellow	5	PCS	192.80	FURNITURE		

Invoice Discount Amount Excl. Tax	0.00	Total Tax (USD)	57.84
Total Excl. Tax (USD)	964.00	Total Incl. Tax (USD)	1,021.84

Invoice Details

Currency Code	Department Code	
Shipment Date	10/16/2018	Customergroup Code	

INSIGHT FROM LAST MONTH

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

ACTIONS

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

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: 5, 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

Review the sales invoice



INSIGHT FROM LAST MONTH

The largest posted sales invoice was for \$21,581

ACTIONS

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



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: 5, 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

My apps

- Outlook
- OneDrive
- Word
- Excel
- PowerPoint
- Notes
- SharePoint
- Teams
- Yammer
- Business Central
- Customer Service Hub
- Sales Hub**

Accounts Chart of Accounts

Customer was School
bought for \$23,102

ACTIONS

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

Select Sales Hub

DUPLICATE SALES AMOUNT
63,890

OVERDUE PURCH. INVOICE AMOUNT
\$49,422

SALES INVOICES PREDICTED OVERDUE
0

> See more

> See more

> See more

ONGOING PURCHASES

PAYMENTS

INCOMING DOCUMENTS

SALES INVOICES

1

PURCHASE ORDERS

4

ONGOING PURCH. INVOICES

3

PURCH. INVOICES NEXT WEEK

0

UNPROCESSED PAYMENTS

1

AVERAGE COLLECTION DAYS

5.8

OUTSTANDING INVOICES

10

MY INCOMING DOCUMENTS

1

Accounts I Follow

Search for records

Account Name	Primary Contact	Address 1: City	Address 1: Stat...	Main Phone	Email (Primary Contact)	Status
Adatum Corporation	Robert Townes	Atlanta	GA	---	---	Active
Alpine Ski House	Ian Deberry	Atlanta	GA	---	---	Active
Relecloud	Jesse Horner	Atlanta	GA	---	---	Active
School of Fine Art	Megan Bond	Miami	FL	---	---	Active
Trey Research	Helen Ray	Chicago	IL	---	---	Active

Select Invoices

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 5 of 5 (0 selected)

All Invoices

Search for records

✓	Name	Status Reason	Total Amount	Customer	Email (Customer)
	Quote for Chairs for Adatum	Billed	---	Adatum Corporation	---



All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Invoice: Invoice
Quote for Chairs for Adatum

Total Amount: ---
Status: Active

Summary | Details | Field Service | Related

Invoice ID * PS-INV103215

Name * Quote for Chairs for Adatum

Currency * US Dollar

Price List * Business Central Default...

Prices Locked * No

PRODUCTS ...

Group By: (no grouping)

	Prod...	Pro...	Price...	Qua...	Dis...
>	BER...	Not C...	\$192.80	5.00000	\$0.00

Page 1

SALES INFORMATION

Opportunity: ---

Contract: [Quote for Chairs for Adatum](#)

Customer: * [Adatum Corporation](#)

SHIPPING DATES

Date Delivered: 10/16/2018

Due Date: 11/16/2018

Detail Amount	---
(-) Discount (%)	---
(-) Discount	\$0.00
Pre-Freight Amount	---

Description: ---

SHIPPING INFORMATION

Convert to Cash



Open Cash Receipts

INSIGHT FROM LAST MONTH

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



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

5



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



Cash Receipt Journals: All Search + New Manage Process Report Edit In Excel More options

NAME	DESCRIPTION	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	NO. SERIES	POSTING NO. SERIES	REASON CODE	COPY TAX SETUP TO JNL. LINES	ALLOW TAX DIFFEREN	SUGGEST BALANCI AMOUNT
GENERAL	GENERAL	G/L Account	10100	GJNL-RCPT			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



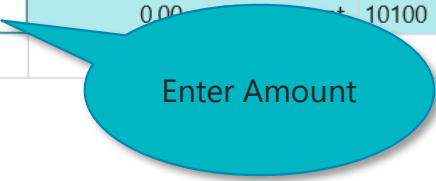
GENERAL-GENERAL

Batch Name GENERAL

Manage Process Page More options

Post Post and Print Apply Entries... Reconcile Dimensions Incoming Document

POSTING DATE	DOCUME... TYPE	DOCUME... NO.	ACCOUNT TYPE	ACCOUNT NO.	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES/)	APPLIES- TO DOC. TYPE
11/1/2018	Payment	G02001	Customer	10000	Adatum Corporation		0.00		10100	<input type="checkbox"/>	<input type="checkbox"/>



ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	Checking account	0.00	0.00

GENERAL-GENERAL

Batch Name: GENERAL

Manage Process Page More options

Post Post and Print Apply Entries... Reconcile Dimensions Incoming Document

POSTING DATE	ACCOUNT TYPE	ACCOUNT NO.	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES/)	APPLIES-TO DOC. TYPE	APPLIES-TO DOC. NO.	CO...
11/1/2018	Customer	10000	Adatum Corporation	-1,021.84	-1,021.84	G/L Account	10100	<input type="checkbox"/>	Payment	<input type="text" value="..."/>	<input type="checkbox"/>
								<input type="checkbox"/>			<input type="checkbox"/>



ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	Checking account	0.00	0.00

CRONUS I

CASH RECEIPT

Cash Receipt

NAME

GENERAL

Manage

Post

POSTING DATE

11/1/2018

Actions Navigate

APPLY CUSTOMER ENTRIES - 10000 - ADATUM CORPORATION

GENERAL

Posting Date: 11/1/2018 Currency Code: []

Document Type: Payment Amount: -1,021.84

Document No.: G02001 Remaining Amount: -1,021.84

POSTING DATE	DOCUME... TYPE	DOCUMENT NO.	CUSTOMER NO.	DESCRIPTION	CURRENCY CODE	REMAINING AMOUNT	APPLN. REMAINING AMOUNT
10/16/2018	Invoice	PS-INV103215	10000	Order S-ORD101006		1,021.84	1,021.84

APPLN. CURRENCY	AMOUNT TO A...	PMT. DISC. AM...	ROUNDING	APPLIED AMO...	AVAILABLE A...	BALANCE
	1,021.84	0.00	0.00	1,021.84	-1,021.84	0.00

OK Cancel



SUGGEST BALANCII AMOUNT

APPLIES-TO DOC. NO. CO...

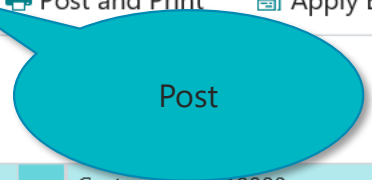
ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	Checking account	0.00	0.00

GENERAL-GENERAL

Batch Name: GENERAL

Manage Process Page More options

- Post
- Post and Print
- Apply Entries...
- Reconcile
- Dimensions
- Incoming Document



POSTING DATE	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES/)	APPLIES-TO DOC. TYPE	APPLIES-TO DOC. NO.	CO...
11/1/2018	Customer 10000 Adatum Corporation	-1,021.84	-1,021.84	G/L Account	10100	<input checked="" type="checkbox"/>	Invoice	PS-INV103215	<input type="checkbox"/>
						<input type="checkbox"/>			<input type="checkbox"/>

ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Adatum Corporation	Checking account	0.00	0.00

CASH RECEIPT JOURNALS

Batch Name: GENERAL

Manage Process Page Actions Navigate Less options

Post Post and Print Apply Entries... Reconcile Dimensions Incoming Document

POSTING DATE	DOCUME... TYPE	DOCUME... NO.	ACCOUNT TYPE	ACCOUNT NO.	DESCRIPTION	AMOUNT	AMOUNT (\$)	BAL. ACCOUNT TYPE	BAL. ACCOUNT NO.	AP... (YES/)	APPLIES- TO DOC. TYPE
11/1/2018	Payment	G02001	Customer	10000	Adatum Corporation	-1,021.84	-1,021.84	G/L Account	10100	<input checked="" type="checkbox"/>	Invoice
										<input type="checkbox"/>	

 The journal lines were successfully posted.

OK



ACCOUNT NAME	BAL. ACCOUNT NAME	BALANCE	TOTAL BALANCE
Self Adatum Corporation	Checking account	0.00	0.00



INSIGHT FROM LAST MONTH

The largest posted sales invoice was for \$21,581

ACTIONS

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



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

Grid of 3 cards: SALES QUOTES (2), SALES ORDERS (5), SALES INVOICES (7)

ONGOING PURCHASES

Grid of 3 cards: PURCHASE ORDERS (4), ONGOING PUR... INVOICES (3), PURCH. INVOI... NEXT WEEK (0)

PAYMENTS

Grid of 3 cards: UNPROCESSED PAYMENTS (1), AVERAGE COL... DAYS (5.8), OUTSTANDING... INVOICES (10)

INCOMING DOCU...

Grid of 1 card: MY INCOMING DOCUMENTS (1)

My apps

- Outlook
- OneDrive
- Word
- Excel
- PowerPoint
- Notes
- SharePoint
- Teams
- Yammer
- Business Central
- Customer Service Hub
- Sales Hub**

Accounts Chart of Accounts

Customer was School
bought for \$23,102

ACTIONS

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

DUPLICATE SALES AMOUNT
63,890

OVERDUE PURCH. INVOICE AMOUNT
\$49,422

SALES INVOICES PREDICTED OVERDUE
0

> See more

> See more

> See more

ONGOING PURCHASES

SALES INVOICES

PURCHASE ORDERS
4

ONGOING PURCHASING INVOICES
3

PURCHASING INVOICES NEXT WEEK
0

PAYMENTS

UNPROCESSED PAYMENTS
1

AVERAGE COLLECTION DAYS
5.8

OUTSTANDING INVOICES
10

INCOMING DOCUMENTS

MY INCOMING DOCUMENTS
1





Show Chart, New, Delete, Refresh, Email a Link, Flow, Export to Excel, Import from Excel, Open Dashboards

All Invoices

Search for records

✓	Name	↑	Status Reason	↕	Total Amount	Customer	↕	Email (Customer)
	Quote for Chairs for Adatum		Complete		---	Adatum Corporation		---

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

1 - 1 of 1 (0 selected)



Benefits

- (1) Reduces initial learning of a new system
- (2) Reduces time in data entry process
- (3) Respond quickly to customer requests

A.I. predicts inventory needs

Select Items

INSIGHT FROM LAST MONTH

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

ACTIONS

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

Activities

Activities

SALES THIS MONTH

\$1,906

> See more

OVERDUE SALES INVOICE AMOUNT

\$64,906

> See more

OVERDUE PURCH. INVOICE AMOUNT

\$49,422

> See more

SALES INVOICES PREDICT... OVERDUE

0

> See more

ONGOING SALES

Grid of sales metrics: SALES QUOTES (2), SALES ORDERS (4), SALES INVOICES (7)

ONGOING PURCHASES

Grid of purchase metrics: PURCHASE ORDERS (4), ONGOING PUR... INVOICES (3), PURCH. INVOI... NEXT WEEK (0)





















PAYMENTS

Grid of payment metrics: UNPROCESSED PAYMENTS (1), AVERAGE COL... DAYS (5.8), OUTSTANDING... INVOICES (10)

INCOMING DOCU...

Grid of incoming documents: MY INCOMING DOCUMENTS (1)

Items: All Search + New X Delete Process Item Request Approval Inventory Attributes Edit In Excel More options

 1896-S ATHENS Desk 1,000.80 4 PCS	 1900-S PARIS Guest Chair, black 192.80 -3 PCS	 1906-S ATHENS Mobile Pedestal 433.60 5 PCS
 1908-S LONDON Swivel Chair, blue 190.10 1 PCS	 1920-S ANTWERP Conference Table 647.80 10 PCS	 1925-W Conference Bundle 1-6 188.80 0 PCS
 1928-S AMSTERDAM Lamp 54.90 8 PCS	 1929-W Conference Bundle 1-8 233.80 0 PCS	 1936-S BERLIN Guest Chair, yellow 192.80 100 PCS
 1953-W Guest Section 1 125.80 -49 PCS	 1960-S ROME Guest Chair, green 192.80 2 PCS	 1964-S TOKYO Guest Chair, blue 192.80 4 PCS
 1965-W Conference Bundle 2-8 233.80 -81 PCS	 1968-S MEXICO Swivel Chair, black 190.10 10 PCS	 1969-W Conference Package 1 341.80 -7 PCS
 1972-S MUNICH Swivel Chair, yellow 190.10 0 PCS	 1980-S MOSCOW Swivel Chair, red 190.10 0 PCS	 1988-S SEOUL Guest Chair, red 192.80 0 PCS
 1996-S ATLANTA Whiteboard, base 1,397.30 10 PCS	 2000-S SYDNEY Swivel Chair, green 190.10 38 PCS	





















Item Details - Invoicing

Item No.	1896-S
Costing Method	FIFO
Cost is Adjusted	Yes
Cost is Posted to G/L	Yes
Standard Cost	0.00
Unit Cost	780.70
Overhead Rate	0.00
Indirect Cost %	0
Last Direct Cost	780.70
Profit %	21.99241
Unit Price	1,000.80

Forecast



Items: All Search + New X Delete Process Item Request Approval Inventory Attributes Edit In Excel More options

 1896-S ATHENS Desk 1,000.80 4 PCS	 1900-S PARIS Guest Chair, black 192.80 -3 PCS	 1906-S ATHENS Mobile Pedestal 433.60 5 PCS
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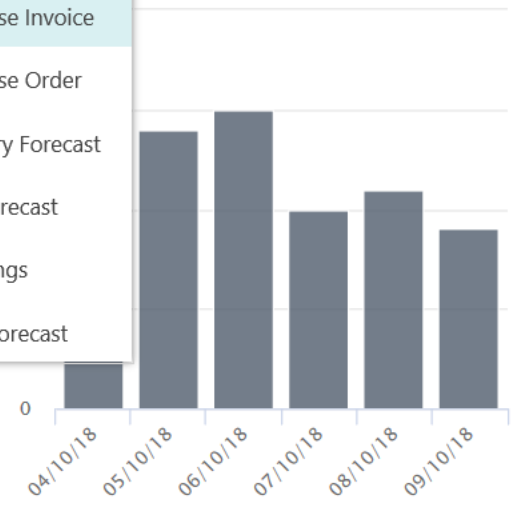
Item Details - Invoicing





















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Unit Price	1,000.80

Forecast

- Create Purchase Invoice
- Create Purchase Order
- Show Inventory Forecast
- Show Sales Forecast
- Forecast Settings
- Delete Sales Forecast

Show Inventory Forecast

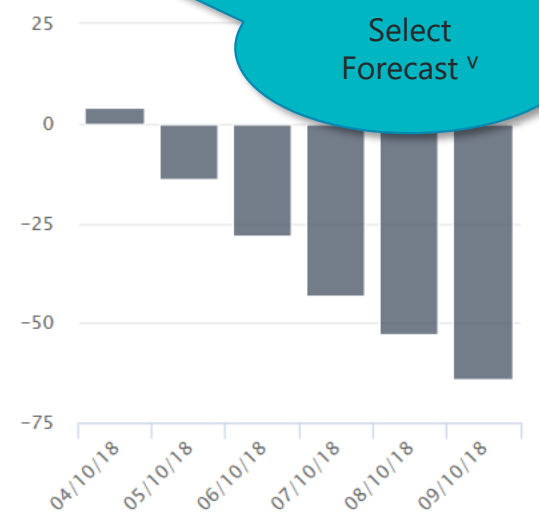


 1896-S ATHENS Desk 1,000.80 4 PCS	 1900-S PARIS Guest Chair, black 192.80 -3 PCS	 1906-S ATHENS Mobile Pedestal 433.60 5 PCS
 1908-S LONDON Swivel Chair, blue 190.10 1 PCS	 1920-S ANTWERP Conference Table 647.80 10 PCS	 1925-W Conference Bundle 1-6 188.80 0 PCS
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

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Forecast



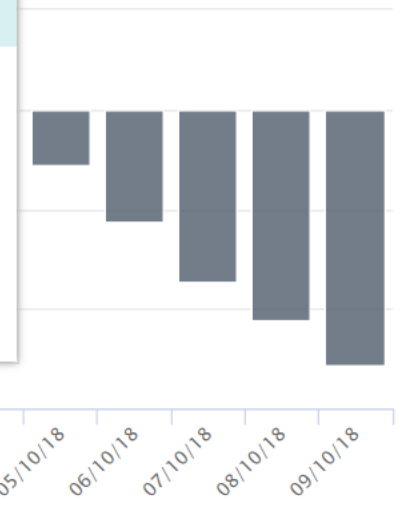
Items: All Search + New X Delete Process Item Request Approval Inventory Attributes Edit In Excel More options

 1896-S ATHENS Desk 1,000.80 4 PCS	 1900-S PARIS Guest Chair, black 192.80 -3 PCS	 1906-S ATHENS Mobile Pedestal 433.60 5 PCS
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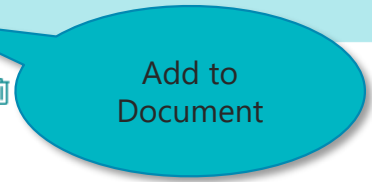
Forecast



Create Purchase Invoice

- Create Purchase Invoice
- Create Purchase Order
- Show Inventory Forecast
- Show Sales Forecast
- Forecast Settings
- Delete Sales Forecast

✕ You have run out of stock on items that this vendor usually supplies. Add them to this document



PURCHASE INVOICE



Add to Document

107212 · Graphic Design Institute

Process Invoice Request Approval Incoming Document More options

General

Show more

Vendor Name Due Date

Contact Vendor Invoice No.

Posting Date

Lines Manage More options

TYPE	NO.	DESCRIPTION/COMMENT	LOCATION CODE	QUANTITY	UNIT ME/ COC
Item	1896-S	ATHENS Desk		43	PCS

Subtotal Excl. Tax (...)	33,570.10	Total Excl. Tax (USD)	33,570.10
Inv. Discount Amou...	0.00	Total Tax (USD)	2,014.21
Invoice Discount %	0	Total Incl. Tax (USD)	35,584.31

Invoice Details

Show more

Attachments

Documents 0

Incoming Document Files

NAME	TYPE
(There is nothing to show in this view)	

Vendor Statistics

Vendor No.	30000
Balance (\$)	6,979.57
Outstanding Orders...	3,880.45
Amt. Rcd. Not Invd...	0.00
Outstanding Invoic...	40,092.70
Total (\$)	50,952.72
Overdue Amounts (...)	6,979.57
Invoiced Prepayme...	0.00

Forecast

25

CRONUS PURCHASE INVOICE

107212 · Graphic Design Institute

Process Invoice Request Approval Incoming Document More options

Reopen Post Post and Print Release



General Show more

Vendor Name Due Date

Contact Vendor Invoice No.

Posting Date

Lines Manage More options

TYPE	NO.	DESCRIPTION/COMMENT	LOCATION CODE	QUANTITY	UNIT ME/ COC
Item	1896-S	ATHENS Desk		43	PCS
Item	1906-S	ATHENS Mobile Pedestal		15	PCS
Item	1908-S	Blue armless swivel chair		5	PCS
Item	1968-S	MEXICO Swivel Chair, black		15	PCS
Item	1972-S	MUNICH Swivel Chair, yellow		29	PCS
Item	1980-S	MOSCOW Swivel Chair, red		15	PCS

Attachments

Documents 0

Incoming Document Files

NAME	TYPE
(There is nothing to show in this view)	

Vendor Statistics

Vendor No.	30000
Balance (\$)	6,979.57
Outstanding Orders...	3,880.45
Amt. Rcd. Not Invd...	0.00
Outstanding Invoic...	55,517.18
Total (\$)	66,377.20
Overdue Amounts (...)	6,979.57
Invoiced Prepayme...	0.00

Forecast

25

Subtotal Excl. Tax (...) 48,121.50 Total Excl. Tax (USD) 48,121.50

HEADLINE

Want to learn more about Business Central? >

ACTIONS

- + Sales Quote + Sales Order + Sales Invoice + Purchase Order + Purchase Invoice > New > Payments > Reports > Setup > Balance Sheet Income Statement Statement of Cash Flows Statement of Retained Earnings Excel Reports



Activities

SALES THIS MONTH

\$4,303

> See more

OVERDUE SALES INVOICE AMOUNT

\$70,826

> See more

OVERDUE PURCH. INVOICE AMOUNT

\$49,422

> See more

ONGOING SALES

SALES QUOTES: 3 SALES ORDERS: 4 SALES INVOICES: 8

ONGOING PURCHASES

PURCHASE ORDERS: 4 ONGOING PURCHASING INVOICES: 3 PURCHASING INVOICES DUE NEXT WEEK: 0

PAYMENTS

UNPROCESSED PAYMENTS: 1 AVERAGE COLLECTION PERIOD: 33.4 DAYS

INCOMING DOCUMENTS

MY INCOMING DOCUMENTS: 1

MY USER TASKS

PENDING USER TASKS: 0

I'm not an accountant ... how
can I sell accounting software?

Dynamics 365 Business - Finance and Operations

Accounting Primer Module 1 - Accounting Software Basics

Type: Video

Publish Date: Oct 27, 2016

Role(s): Marketing, Sales

Level: 100

This module explains the evolution of **accounting** software and **accounting** services and explains their relationship to ERP (enterprise resource planning).

Dynamics 365 Business - Finance and Operations

Accounting Primer Module 2 - Accounting Fundamentals

Type: Video

Publish Date: Oct 27, 2016

Role(s): Marketing, Sales

Level: 100

This module teaches fundamental **accounting** concepts and the importance of these concepts to a business.

Dynamics 365 Business - Finance and Operations

Accounting Primer Module 4 - Closing and Glossary

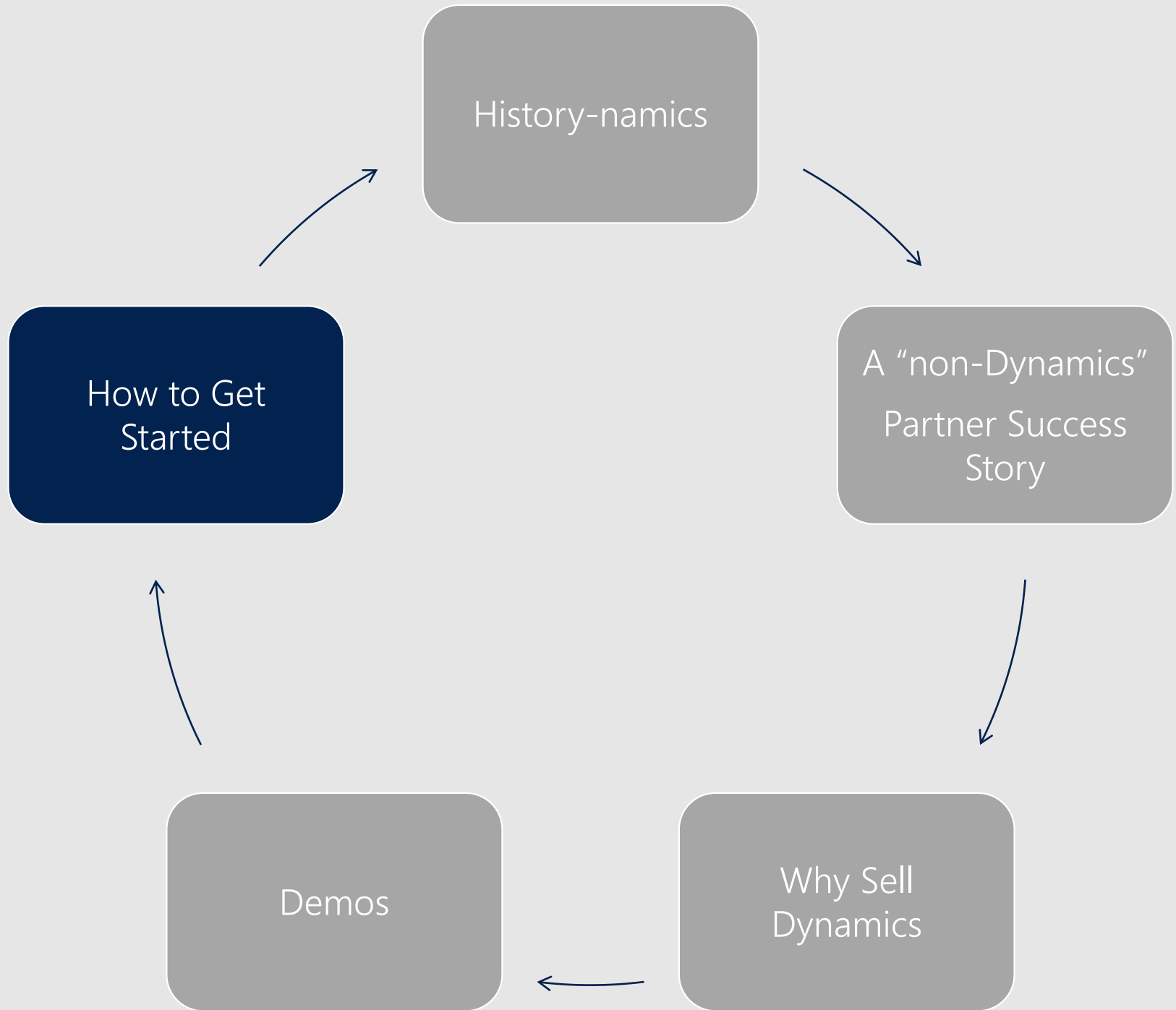
Type: Video

Publish Date: Oct 27, 2016

Role(s): Marketing, Sales

Level: 100

The course closes and points to a downloadable glossary of standard **accounting** terminology.



Reduce your risk

Getting started

1

Build a
strategy/plan

2

Create a
trial

3

Learn to
demo

4

Learn the
product

5

Determine
how to
implement

6

Connect with
community

Step 1 – Build your business plan

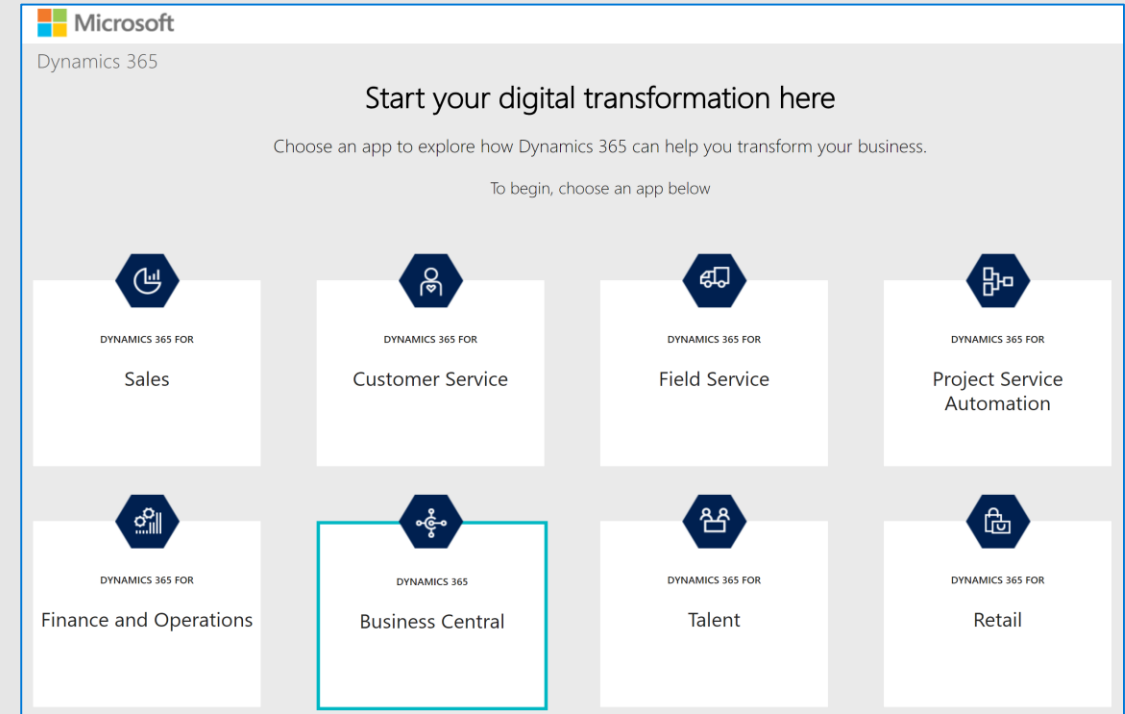
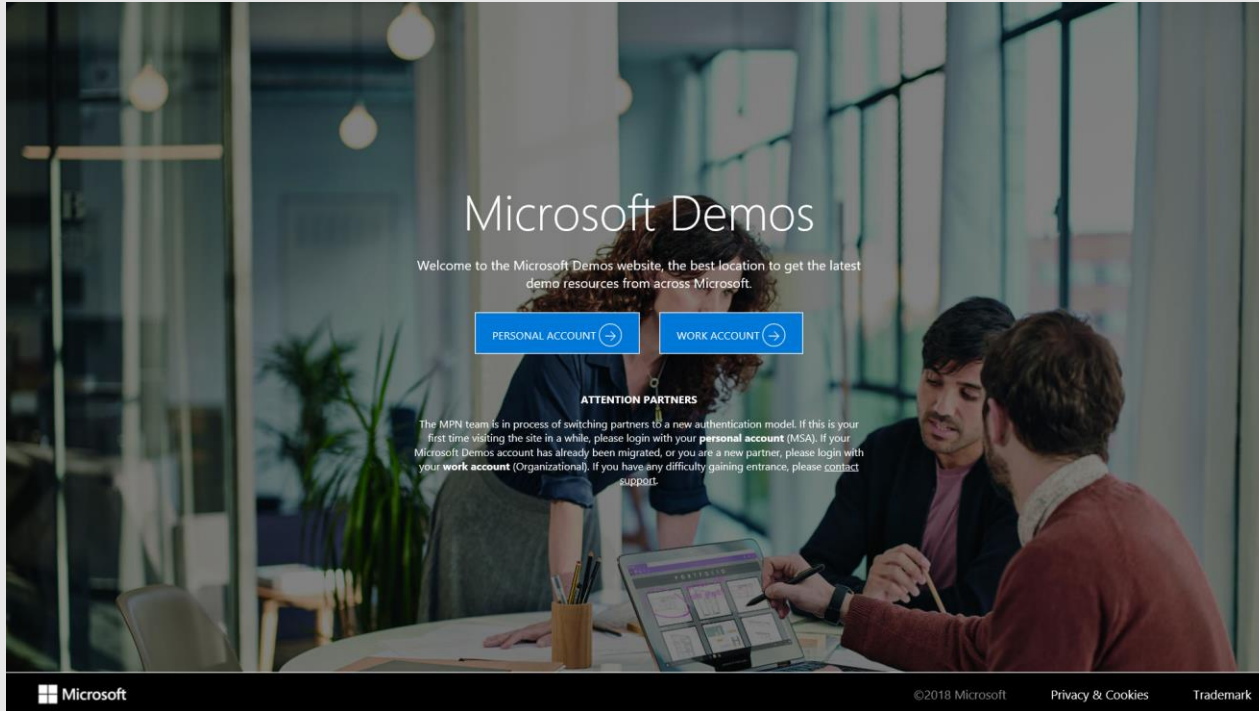
aka.ms/dynamics365businesscentral/salestools

Dynamics 365 Action Plan for Success							
Step 1				Step 2		Today's Date	
Partner Name: <Enter Partner Name>		Get Started		Enter Start Date		1/11/2018	
Partner Business Owner: <Enter Owner Name>		Get Optimized		1/3/2018		Days in Plan: 8	
Microsoft Partner Account Owner: <Enter PDM Name>						% Complete: 0%	
Microsoft Partner Technical Owner: <Enter PTS Name>						% Incomplete: 100%	
ACTIONS	PARTNER OWNER	MICROSOFT OWNER	MSFT LEAD	COMPLETION DATE	DAYS COMPLETE (partner estimate)	STATUS (2 = completed, 1 = in progress, 0 = not started)	
BUSINESS DEVELOPMENT/SOLUTION DEFINITION							
1	Determine economic business model		PDM	February 2, 2018	30	✘	
2	Define a repeatable solution (includes IP, services, support, vertical etc.)		PDM	February 2, 2018	30	✘	
3	Define a cloud solution package and price		PDM	March 4, 2018	60	✘	
4	Identify competitive landscape and your differentiators		PDM	February 2, 2018	30	✘	
5	Detail customer profile & your market opportunity		PDM	February 2, 2018	30	✘	
6	Learn the Dynamics 365 value proposition		PDM	March 4, 2018	30	✘	
7	Identify cross-sell opportunities with other Microsoft solutions		PDM	February 2, 2018	30	✘	
MARKETING							
1	Identify a marketing lead(er)		PDM	February 2, 2018	30	✘	
2	Develop your company's Dynamics 365 value proposition		PDM	March 4, 2018	60	✘	
3	Identify demand drivers		PDM	February 2, 2018	30	✘	
4	Define a trial strategy		PDM	March 4, 2018	60	✘	
5	Develop marketing plan & budget		PDM	February 2, 2018	30	✘	
6	Develop identified content to support marketing plan		PDM	March 4, 2018	60	✘	
7	Select and implement a Marketing Automation System (i.e. Click Dimensions)		PDM	March 4, 2018	60	✘	
8	Develop web pages to support Go-to-Market strategy (i.e. landing page, microsite, etc.)		PDM	March 4, 2018	60	✘	
9	Schedule and deliver weekly, bi-weekly prospect webcasts		PDM	March 4, 2018	60	✘	
SALES							
1	Identify a dedicated cloud sales lead(er)		PDM + PTS	March 4, 2018	60	✘	
2	Define your first customer acquisition plan		PDM + PTS	February 2, 2018	30	✘	
3	Define your cloud sales process		PDM	February 2, 2018	30	✘	
4	Define target prospect profile and qualification criteria		PDM	March 4, 2018	60	✘	
5	Develop customer and industry pain sheets		PDM	March 4, 2018	60	✘	
6	Configure sales assets (for industry)		PDM	March 4, 2018	60	✘	
7	Script your "Buy-In" / "WOW" demo		PTS	February 2, 2018	30	✘	
8	Develop comprehensive solution demonstration		PTS	March 4, 2018	60	✘	
9	Schedule and deliver weekly, bi-weekly prospect webcasts		PDM + PTS	March 4, 2018	60	✘	
DELIVERY							
1	Determine your approach for implementation (how services will be packaged & sold)		PTS	February 2, 2018	30	✘	
2	Develop a rapid deployment plan and project plan		PTS	March 4, 2018	60	✘	
3	Identify a dedicated cloud/repeatable implementation resource		PTS	February 2, 2018	30	✘	
4	Establish three-tier packaged service offering, submit to AppSource		PTS	March 4, 2018	60	✘	
5	Develop on-demand training assets		PTS	March 4, 2018	60	✘	

Step 2 – Create a demo environment

www.demos.microsoft.com









www.trials.dynamics.com.com















Step 3 – Learn the basic demo scenarios

aka.ms/dynamics365businesscentral/salestools

ROLE-BASED SCENARIOS

Owner 	Accountant 	External Accountant 	Bookkeeper 
Sales Manager <i>(Business Central)</i> 	Sales Representative <i>(Business Central & Sales)</i> 	Marketing Manager <i>(Business Central)</i> 	Project Manager 

BUSINESS PROCESS-BASED SCENARIOS

Quote to Cash <i>(Business Central)</i> 	Opportunity to Quote <i>(Business Central)</i> 	Manage your Inventory 	Setting up a new Company 
Quote to Cash <i>(Sales – Business Central)</i> 	Procure to Pay 	Customer Approval Process 	Intercompany 
Enter a Sales Order <i>(from Mobile Device)</i> 	Drop Ship Sales Order 	Reconcile Bank Accounts 	Consolidations 

Step 3.5 – Learn how to configure the demos

aka.ms/bizcentral



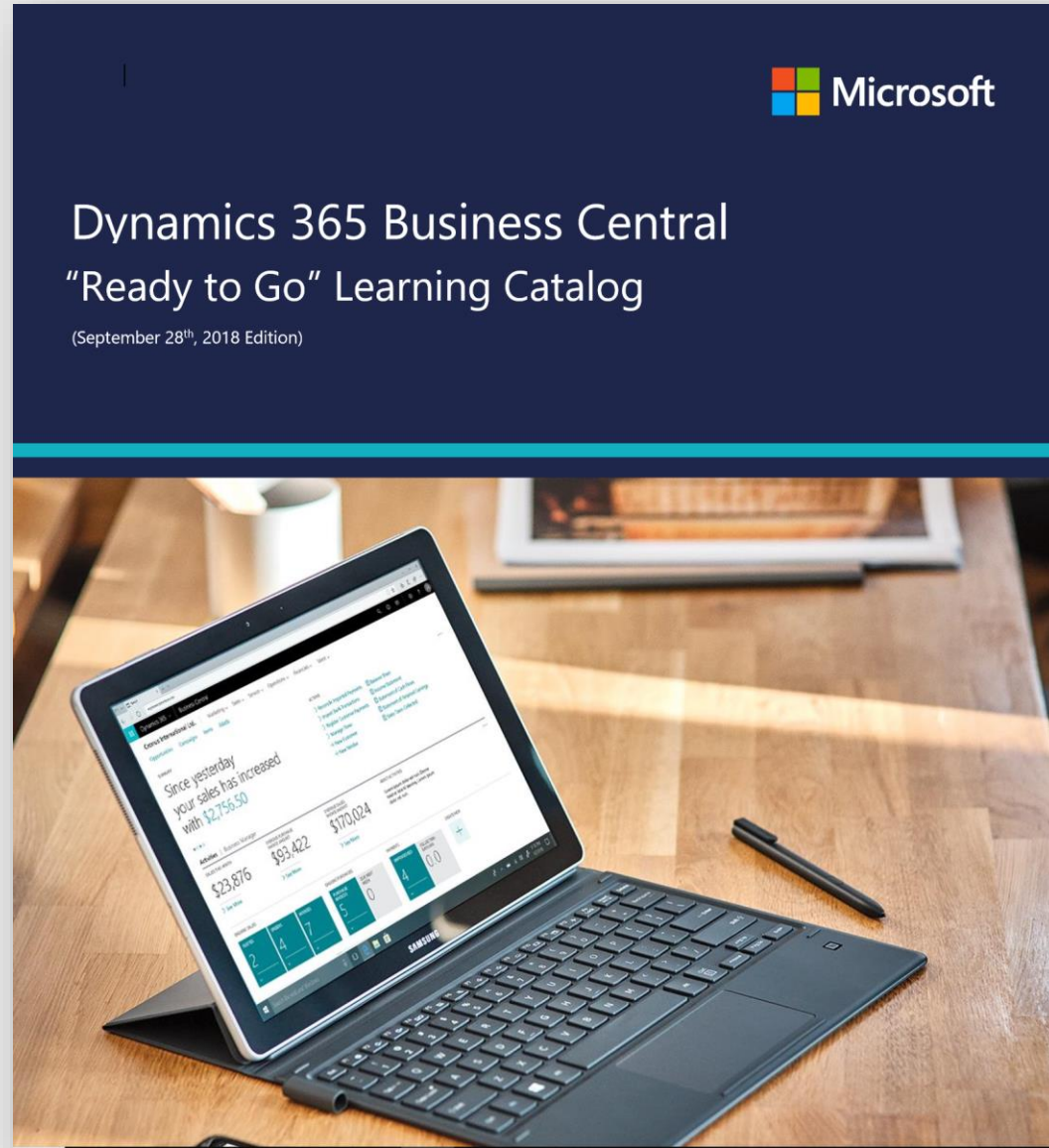
[Connect, Configure, and Explore – Introduction](#)
[Configure Business Central and a Mobile Device](#)
[Configure Business Central and Microsoft Outlook](#)
[Connect Business Central](#)
[Connect Business Central and PowerBI](#)
[Create a Trial Account for Business Central](#)
[Explore Business Central and Microsoft Flow](#)

[Explore Business Central and PowerApps](#)
[Explore Business Central Navigation](#)
[Explore Business Central with Machine Learning and AI](#)
NEW: [Explore Business Central and Drop Ship Sales Orders](#)
NEW: [Explore Business Central and Procure to Pay](#)
NEW: [Explore Business Central and Quote to Cash](#)
NEW: [Explore Business Central by Extending Demo Data](#)

aka.ms/BizCentral

Step 4 – Learn the product, get trained

aka.ms/readytogo



Thursday | August 16, 2018

Dynamics 365



Marketing



Sales



Customer Service



Field Service



Finance and Operations



Project Service Automation



Talent



Retail



Business Central

Hi Craig

You have 8 new notifications

Let's Get Started!



Step 1: Select a Microsoft Dynamics Product



Step 2: Build Your Learning Plan



Step 3: Consume Course Content

Help

Step 5 – Determine how you plan to implement

aka.ms/readytogo

Learning **Coaching** Tooling Resources

Several Development Centers, Master VARs, and Training Centers provide “Ready to Go” coaching.

The coaches are independently owned companies which provide services to partners, tailored to their needs. Over time they have developed lots of best practices by supporting multiple partners, they also have strong ties with Dynamics 365 Business Central teams and are always up to date on the latest strategy and product innovation.

An example of one of the coaching sessions provided by the Development Centers and Master VARs are the “Ready to Go” validation workshops. This workshop is an 8h workshop at a fixed price which is designed to coach you in bringing your app into Microsoft AppSource or help you with the implementation of your first customer.

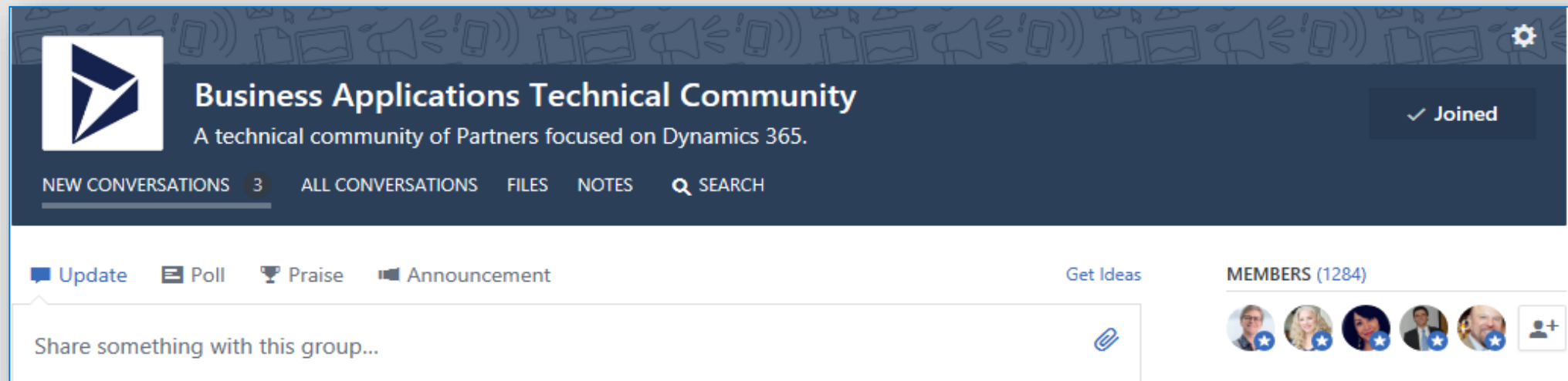
Please find the coaches in your region and explore which “Ready to Go” offerings they provide:

Company	Coaching services provided	More info
1ClickFactory (Development Center)	Coaching and training services in person and online in Europe, North and South America, Asia, and Africa.	ReadyToGo Contacts
Ciellos (Development Center)	Coaching and training services in person and online in Europe, North, and South America.	ReadyToGo Contacts
Cloud-Ready-Software (Development Center)	Coaching and training services in person and online in Europe, North and South America, Asia, and Africa.	ReadyToGo Contacts
Innova Consulting (Development Center)	Coaching and training services in person and online in Europe and South America.	ReadyToGo Contacts
QBS Group (MasterVAR)	Coaching and training services in person and online in Europe.	ReadyToGo Contacts
Velosio (MasterVar)	Coaching and training services in person and online in North America.	ReadyToGo Contacts
Plataan (Training Center)	Training services in person and online in Europe, North and South America, Asia, and Africa.	ReadyToGo Contacts

Step 6 – Meet the community, join the calls

<https://www.yammer.com/msuspartner>

https://www.yammer.com/msuspartner/#threads/inGroup?type=in_group&feedId=6678568



The screenshot shows the Yammer interface for the 'Business Applications Technical Community'. The header features the group's logo, name, and a 'Joined' button. Below the header is a navigation bar with options like 'NEW CONVERSATIONS 3', 'ALL CONVERSATIONS', 'FILES', 'NOTES', and 'SEARCH'. A secondary bar offers post types: 'Update', 'Poll', 'Praise', and 'Announcement', along with a 'Get Ideas' button. The main content area has a text input field 'Share something with this group...' and a 'MEMBERS (1284)' section displaying several member avatars.

Tech Community Call - 2nd Tuesdays

Register @ <http://aka.ms/usbusinessapplicationscall>

Closing comment