WESTCOAST CLOUD

DYNAMICS 365 SALES AND BUSINESS CENTRAL

It's what's inside that counts

Salespeople are an outward-looking bunch. Spending much of their time gathering intel on customers and prospects.

But we all need some me-time. And it's important that salespeople understand what's going on inside their businesses too.

When you use Dynamics 365 Sales for customer engagement, you get easy access to internal sales data and backend activities, like order processing, inventory, and finance. So, sales people can work with and sync data shared by both services – customers, contacts, and more.

FOR EXAMPLE

A salesperson in Dynamics 365 Sales can use price lists from Business Central when they create a sales order. They'll also see inventory levels from Business Central whenever they add an item.

And it works the other way around too. Order processors in Business Central can handle sales orders automatically or manually transferred from Dynamics 365 Sales.

In just a few simple steps, you can bring your data together between Dynamics and Business Central, making it work harder for you and your salespeople. Here's how.

COUPLE UP

In Dynamics 365 Sales, sales orders depend on information held in Business Central. Information about customers, units of measure, currencies, customer price groups, items, and resources. For easy integration with Business Central, this data has to be synchronised. Call us old romantics, but we call this process, coupling. And this is how it works.

So, if you want to see accounts in Dynamics 365 Sales as customers in Business Central, you must couple the two types of records. The same goes for items, resources, and prices too.

DATA	WHAT TO COUPLE
Customers and accounts	Salespeople with Dynamics 365 Sales users
Items and resources	Units of measure with Dynamics 365 Sales unit groups
Items and resource prices	Customer price groups with Dynamics 365 Sales prices

LET THAT SYNC IN

Coupling up should never be a chore. That's why you've got the option to automatically synchronise all relevant records between Dynamics 365 Sales and Business Central. Just choose the **Start** action on the **Dynamics 365 Sales Full Synch Review**.

A DYNAMIC DUO

Setting up data sharing between Dynamics and Business Central takes minutes. But the process is a little different depending on the data in question.

1 SALES ORDER DATA

To automatically transfer sales order data from Dynamics 365 Sales to Business Central:
Check the Automatically Create Sales Orders box on the Microsoft Dynamics 365 Connection Setup page.

You can also manually convert submitted sales orders from Dynamics 365 Sales by:
Using the Create in Business Central action available on the Sales Orders – Dynamics 365 for Sales page.

2 SALES QUOTE DATA

To automatically transfer future sales quotes to Business Central:
Select the Automatically Process Quotes check box on the Microsoft Dynamics 365 Connection Setup page.

To manually convert activated sales quotes:
Use the Process in Business Central action on the Sales Quotes – Dynamics 365 Sales page.

If you're used to seeing v1.2.3 or V9 FINAL at the end of your sales quotes, fret not! All previous versions are archived before new versions are synced between systems.

3 POSTED SALES INVOICES, CUSTOMER PAYMENTS, AND STATISTICS

To transfer invoiced sales orders to Dynamics 365 Sales:

Select Create Invoice in the Dynamics 365 Sales check box on the Posted Sales Invoice page. Posted invoices will show the status, Billed.

To keep this status up to date:

Choose the Update Account Statistics action on the customer page in Business Central.

When a customer makes a complete or partial payment, this status will change to Paid with the Status Reason field set to Partial or Complete.

Want to know more?

If you need to refresh your memory, re-watch our Dynamics 365 Sales and Business Central webinar.

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If you've still got questions that need answering, get in touch on: dynamics@westcoastcloud.co.uk

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