

KonnECT

The E-Newsletter from



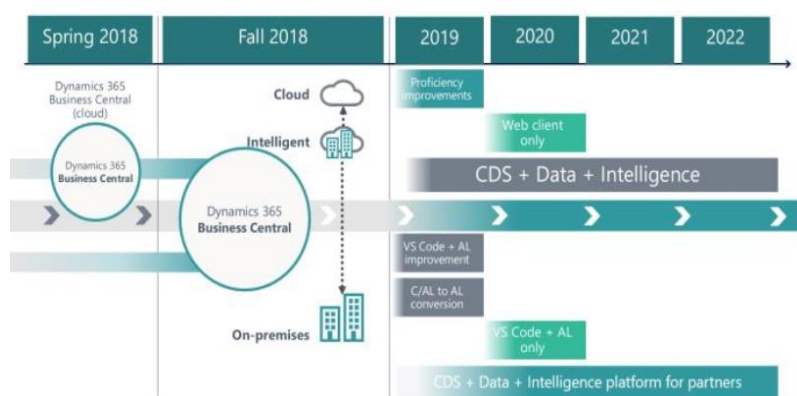
Issue 02

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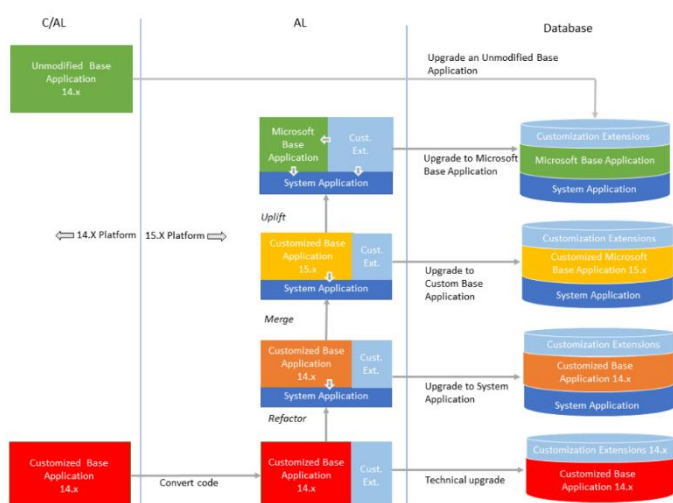
1. Upgrade Dynamics NAV → Business Central Benefits and Overview

This section provides an overview of benefits to upgrade to Business Central. The upgrade process depends on different factors, including on your decision to deploy Business Central **on-premises** or move your solution **online**.



- **Service fundamentals:** Laser focus on performance, reliability, supportability, and security is essential to ensure that service quality remains ahead of the growth in service usage. Accessibility, already in a strong position, must be preserved.
- **Modern client:** With the 2019 release wave 2, users access Business Central in the browser, Windows 10 desktop app, mobile apps on Android and iOS, or in Outlook. We accelerate our investment in speed and productivity features for the modern browser experience, achieving a major milestone in its transformation into a world-class desktop experience for new and expert users alike. The 2019 release wave 2 is the first version that does not include the Dynamics NAV Client connected to Business Central (also known as the Windows client). The modern clients now support so many productivity features that the Windows client is discontinued for Business Central going forward. The legacy Dynamics NAV client remains supported in the April '19 update and earlier versions in alignment with the support lifecycle.

KE Consulting provides a smooth transition to Dynamics 365 Business Central. We offer our knowledge, experienced, certified team and automated upgrade tools pack to grow and optimize Dynamics NAV. We deliver upgrade projects to Dynamics 365 Business Central much faster than anyone else with Upgrade Automated Tools. Request your upgrade project evaluation to Dynamics 365 Business Central and move to Extensions in a few weeks. **KE Consulting** offers upgrades to Dynamics 365 Business Central 15 Wave 2 version and provides Customers with a fixed scope for all existing upgrade paths to the latest version. When upgrading your Business Central Spring 2019 (version 14) solution to version 15, the goal is to move towards a full uptake of the Business Central base and system applications, as they are, and migrating code customizations to add-on extensions. There are different upgrade paths that you follow to get to this state, as illustrated in the following figure.



Application enhancements

Microsoft will continue to enhance the application through focus on performance in most used areas. Dynamics NAV Business Central continues to deliver application enhancements, as follows:

- Allow non-sequential numbering
- Cancel reminders and finance charge memos
- Carry line descriptions to G/L entries when posting
- Create records and convert prospects with better templates
- Use the Copy Document function on blocked lines
- Batch-post sales and purchases as scheduled
- Reconcile payables with the External Document No. field
- View External Document No. on Aged Accounts Payable report
- Specify default purchasing method on item cards
- Undo shipment or receipt lines for non-item types
- Use receipt date when customizing the Purchase Order report
- Use the Post and New action on purchase documents
- Add the Name 2 field to customer and vendor cards
- Include job information in archived sales and purchase documents
- Use VAT clauses on different document types
- View item availability by unit of measure
- View the number of general journal lines
- Skip empty lines in the Account Schedule report
- View customers' contact and document info on sales documents
- MICR fonts available in Business Central online

New license model with Microsoft Dynamics 365 Business Central

The October release also changed the license model, which means that there are no longer simultaneous licenses, but instead that each license purchased is for a named user. A named user is defined as a single person. This means, that each employee who needs to have access to the solution, requires their own license. However, a named user can access the application from multiple devices.

BIO



Laurence Sidney is the Owner and CEO at **KE Consulting**.

Born in Australia and lived in the UK for the past 22 years. Laurence is a Chartered Accountant and started KE Consulting in 1997.

Laurence has worked in NAV since 1998 and is an expert in Supply Chain, Utilities and Services. He loves NAV and Business Central and believes it is the World Leading ERP for SMEs.

Laurence's hobbies include travel and mountain climbing. Having done Ice Climbing in the French Alps and Kilimanjaro in 2018. Mont Blanc is on the plan for 2021.



2. ZETADOCS (Suite)

Zetadocs is a suite of add-ons for Microsoft Dynamics 365 Business Central and NAV it helps you streamline business processes, freeing you from paper and improving the way your business operates. Finance departments, customer services, sales and operational teams can work more efficiently on screen, saving time and costs, while offering better service levels to customers, suppliers and staff.

Zetadocs Express is available at no additional cost to Business Central and NAV customers on a Dynamics service plan.

Zetadocs Express

- Send any report individually
- Automatic addressing of emails
- Personalized email subject
- File copies automatically in a choice of electronic archives
- File documents and emails against any Business Central or NAV record
- Sets standard metadata such as the record no. for filtering document lists in SharePoint
- Drag and drop in the Windows Client (RTC) and Web client
- Touch and choose to attach files with any Business Central or NAV client – Windows or HTML clients (including Web, Tablet, Phone clients and Universal App)
- File documents and emails against any Business Central or NAV record
- Sets standard metadata such as the record no. for filtering document lists in SharePoint
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Zetadocs Delivery

- Bulk emailing of personalized invoices, statements and reminders
- Consolidate multiple emails to same recipient
- Flexible control over adding standard attachments like terms & conditions
- Flexible delivery rules to set the From email address, add additional recipients and change default delivery method

Delivery Plus

- Override the entire delivery logic and rules with code
- Schedule emailing of statements and reminders automatically using Job Queues
- Programmatic control over attachments, for example to attach copy invoices to reminders
- Set additional archived metadata

Capture Essentials

- Batch processing of scanned documents to Business Central and NAV Sales and Purchase records
- Configure additional SharePoint archive metadata
- Find files and emails attached to other records from any Business Central or NAV record
- Check files in and out of multi-user document queues

Capture Plus

- Customizable document queues for automated filing to any existing Business Central or NAV record
- Unattended automation as a background task on the Business Central or NAV server
- Full customizable control to set additional SharePoint archive metadata
- Archive searchable PDF/A files in SharePoint

Zetadocs Approvals

- Purchase order and invoice authorization
- Approve Business Central and NAV purchase records from any browser
- Delegate blocked approvals
- Flexible rules for automated routing
- Add almost any Business Central and NAV field as custom data
- Automated reminders of overdue approvals

Zetadocs Expenses

- Capture, submit and approve travel and business expenses for reimbursement
- On the go capture of expenses, sync when back online
- Automatic policy enforcement for a smoother claims process
- Reminder emails for approvers to help prevent delays in signing off expenses
- Seamless Business Central and NAV integration for reimbursement and credit card reconciliation



Save Time & Costs

- Switch from paper-based business processes and unstructured emails to secure, easy to use software that is designed for efficiency.
- Instantly deliver invoices, statements and reminders by email
- Eliminate printing, handling and mailing of documents and emails
- Remove storage costs associated with retaining paper documents



Improve Service

- Help finance and customer services teams respond to customers, suppliers and colleagues more quickly by having everything on screen.
- Address urgent queries in real time, leading to strengthened relationships
- File related documents automatically to help staff handle queries efficiently
- Encourage earlier dialogue by emailing copy invoices or other documents



Reduced carbon footprint

- Care for the environment by reducing your dependence on paper by cutting the amount of paper printed and stored.
- Deliver business documents using email instead of physical mail
- Reduce the use of printer consumables and energy in sales processes
- Capture and store documents electronically in place of filing cabinets

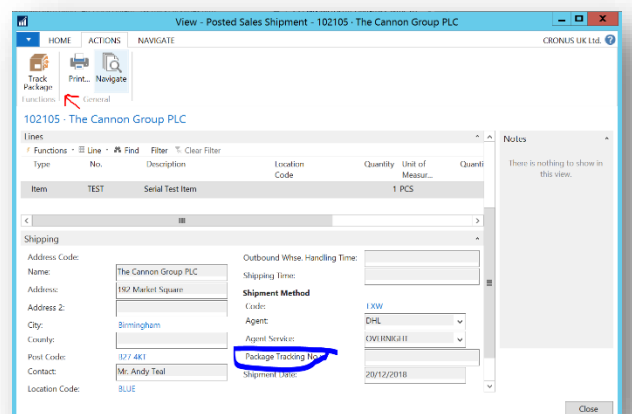
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3. Tips and Tricks - How to Track Packages

A number of shipping agents provide services on the Internet that allow you to track parcels you have handed over to the agent. If you use one or more of these shipping agents, you can set up certain basic information and use the automatic tracking feature from posted shipments.

Follow these Steps:

1. In the **Search** box, enter **Sales Shipments**, and then choose the related link. Open the relevant sales shipment.
2. On the **Shipping** FastTab, fill in the **Shipping Agent Code** field.
3. In the **Package Tracking No.** field, enter the package number you have received from the shipping agent.
4. On the **Actions** tab, in the **Functions** group, choose **Track Package**.
5. The program opens your default browser and locates the package tracking page.



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