BC TOOLBOX PRODUCT GUIDE

Dashboarding, Productivity, and Automation Tools for 365 Business Central.

B C T O O L B O X . C O M

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ERP Connect CONSULTING + BUSINESS CENTRAL TOOLBOX

1 Hour to Implement

FINANCIAL DASHBOARD

\\\\\ Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting these to display directly in BC

\\\\\ Our Solution

- 34 KPIs and Metrics out of box with minimal configuration required
- Everything is embedded directly into BC, so no need for external licensing
- One stop shop for visuals and quick data analysis in Business Central
- Full drill down capabilities on all data points in Business Central

Quick Wins

- Download and Immediately see AR/AP metrics with no configuration
- Sales, Inventory, and Most Cash Metrics out of box
- Balance Checks ready to go that can lead to reconciliation projects

\\\\\ Other Features

- KPI views for Pipeline, Revenue comparisons, Margins and more
- AP/AR Aging pie charts by aging bucket
- Inventory value by Item Category/Location
- Sales by Global Dimension #1 and #2
- Cash Balance by Bank Account

Have You Said

- We want to start with embedded financial reporting before looking at external tools
- What dashboards does Business Central have built in already

ERP Connect Consulting + Business Central Toolbox

1 Hour to Implement

SALES DASHBOARD

\\\\\ Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting these to display directly in BC

\\\\\ Our Solution

- 25 KPIs and Metrics out of box with minimal configuration required
- Everything is embedded directly into BC, so no need for external licensing
- One stop shop for visuals and quick data analysis in Business Central
- Full drill down capabilities on all data points in Business Central

Quick Wins

- Download and Immediately see sales data broken out by Geography, Date, Item, and Dimension
- Download and Immediately see sales data broken out by Salesperson, Customer and Backorder

\\\\\ Other Features

- US and World Sales Bubble Maps
- Sales by Day, Week, Month, Year, etc.
- Sales by Global Dimension #1 and #2
- Sales by Item, Salesperson and Customer

Have You Said

- We want to start with embedded sales reporting before looking at external tools
- What dashboards does Business Central have built in already

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1 Hour to Implement

HISTORY AND STATISTICS

\\\\\ Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting these to display directly in BC

\\\\\ Our Solution

- 30 KPIs and Metrics out of box with minimal configuration required
- Everything is embedded directly into BC, so no need for external licensing
- One stop shop for visuals and quick data analysis in Business Central
- Full drill down capabilities on all data points in Business Central

Quick Wins

- Download and Immediately see Customer, Vendor, and Item Statistics with no configuration
- See Sales, Purchase and Quantity Trends across Customer, Vendors, and Items

\\\\\ Other Features

- Item Statistics like Quantity on Hand, Average Lead Time and Sales Price Trends
- Vendor Statistics like Purchases By Item Category and On Time Delivery
- Customer Statistics like Average Pay Days
- Enhanced Change Logs

Have You Said

- We want to start with embedded sales reporting before looking at external tools
- What dashboards does Business Central have built in already

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1 Hour to Implement

WAREHOUSE DASHBOARD

\\\\\ Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting these to display directly in BC

\\\\\ Our Solution

- 24 different visualizations
- Does not require anything to be built from scratch
- Everything is embedded directly into BC
- One stop shop for visuals and quick data analysis in Business Central
- Full drill down capabilities on all data points in Business Central
- Purchase Order and Sales Order dashboard with easy to digest information

Quick Wins

- Download and Immediately see Shipping, Receiving, Inventory, Vendor, Sales and Purchase metrics with no configuration
- Purchase Order follow-ups from a centralized dashboard

\\\\\ Other Features

- Analyze Shipment/Receipt Dollars, Orders, and Lines to monitor activity levels
- Quickly monitor Adjustment and Cycle/Physical Counting Activity
- Analyze Vendor performance for on time delivery and overall performance

Have You Said

- We want to start with embedded operational reporting before looking at external tools
- What dashboards does Business Central have built in already

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2 Hours to Implement

INVOICE AND STATEMENT DELIVERY

\\\\\ Business Central Gaps

- Emailing Documents out of Business Central is manual and time consuming
- There is no easy way to bulk send or send immediately upon posting in BC
- No way to send automated reminders, Statements, Payment Receipts, or Recurring Invoices

\\\\\ Our Solution

- Automatically send Sales Documents upon posting
- This Includes Invoices, Credit Memos, and Payment Receipts
- Send Statements and Reminders automatically
- Ability to skip send on post and send later from a dashboard
- Schedule Documents to send on a daily, weekly, monthly, or on a user defined schedule
- Auto email AR Aging internally on a daily basis
- Rich text HTML email templates give more flexibility and company branding in all Customer and AR emails

Quick Wins

- Enable Documents to send on post
- Customize email subject and body for company branding
- Auto email AR Report to your inbox, daily
- Schedule Statements and Reminders auto send

\\\\\ Other Features

- Update Posted Document fields such as Customer, Address, Dates, Payment Terms, External Document, Salesperson, and GL/Comment Lines
- Create Recurring Orders and Invoices for easier Recurring Billing management.

Have You Said

- I want an easier way to send Invoices to Customers automatically
- Is there an easier way to send Past Due reminders to my Customers
- Recurring Invoicing is such a hassle

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2 Hours to Implement

ADVANCED NOTIFICATIONS

\\\\\ Business Central Gaps

- No ability to add Pop Up Notes for Customers, Vendors, and Items
- No ability to add On the Fly Notes to transactions and create a workflow to the tagged users
- No ability to tag individuals or groups directly in Business Central with automated emails

\\\\\ Our Solution

- Rich Text HTML Notes for Customers, Vendors, Items, Purchase/Sales Documents, and Production Orders
- Notes that trigger based on event occurring in system (Credit Limit is exceeded, Purchase Order has been received, etc.)
- Ad Hoc Notes that give users the ability to tag other users/groups on Purchase/Sales Docs, Master Data Records and Production Orders on the fly
- Notes that are automatically emailed to a user/group with a link to the exact record in BC the note was created on

Quick Wins

- Add to Rich Text HTML Pop up Notes to Customers, Vendors, and Items
- Automatically add Pop up Notes to Purchase/Sales Documents and Production Orders

\\\\\ Other Features

- Ability to view "My Notifications" on the BC Role Center
- Ability to auto-save and copy the note to the individual transaction in Pop Up Notes
- Ability to block emails/exclude users from receiving notifications where necessary

Have You Said

- We are looking for easier ways to be notified about activities that are occurring in our system
- We want our Pop Up Notes to also be saved on the transaction

ERP Connect Consulting + Business Central Toolbox

2 Hours to Implement

ADVANCED ACCOUNTING

Business Central Gaps

- No ability to easily deliver reports via email in out of box Business Central
- No easy way to see remittance information after Vendor Payment Journals have been posted
- Printing checks in BC doesn't have enhanced features around signature and threshold printing

Our Solution

- Advanced Accounting gives the ability to deliver excel based reports directly to your inbox on a daily basis
- Ability to view posted Payment Journal Remittance information on an easy to view dashboard
- Enhanced check printing with custom signatures and signature threshold capabilities when printing based on amount
- Vendor Default Purchase Lines available directly on the Vendor Card

Quick Wins

- Immediately schedule reports to start being delivered into your inbox
- Immediately start viewing data on the ACH Payment Dashboard
- Start utilizing Vendor default purchasing lines right on the Vendor Card

Other Features

- Dashboard that allows you to expand into multi-dimensional trial balance
- Ability to see on both Documents and Posted Documents LCY at a line level

Have You Said

- We want excel reports delivered to our inbox on a daily basis
- We want the ability to see ACH information after the Vendor Payment Journal has been processed

ERP Connect Consulting + Business Central Toolbox

2 Hours to Implement

ADVANCED PREPAYMENTS

\\\\\ Business Central Gaps

- No out of box Prepayments functionality in the Customer or Vendor Cards in BC
- No easy way to manage when Prepayments need updates at an SO or Sales Invoice level
- No ability to manage Prepayments on Jobs with out of box Business Central

\\\\\ Our Solution

- Customer Prepayments, Deposits, and Retainers built natively into BC at a Customer and Vendor Card level
- More flexibility when managing Sales Order/Invoice Prepayments
- Sales Order Prepayments at a Job level
- Ability to view AR dashboard for Customer Prepayments and AP dashboard for Vendor Prepayments
- Customer and Vendor Prepayment dashboard to show full activity for selected record

Quick Wins

- Create Customer and Vendor Deposits and Retainers immediately after GL Accounts are configured
- Start utilizing Advanced Prepayments on Sales Orders/Invoices, Purchase Orders/Invoices, and Jobs

\\\\\ Other Features

- Ability to skip using Prepayment funds on Orders/Invoices if you want on a transaction by transaction basis
- Does not lock down lines after the Prepayment is Invoiced or Received

Have You Said

- We find the process very manual when Prepayments change
- Our Customer Deposit/Retainer process is very manual today

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35 Hours to Implement

ADVANCED CRM

Business Central Gaps

- Only one Contact Card type that can't be broken up into different stages of the sales process
- No easy way to track Tasks, Calls, Emails, Meetings and Notes directly in the Contact Card
- No sales rep and manager-focused dashboards and reporting

Our Solution

- Lead, Opportunity and Customer Contact cards that allow sales reps/managers to track their pipeline
- Enhanced Task Tracking and Activity Logging directly in enhanced Contact Cards and visible on Contact timeline
- Sales rep and manager dashboards to track pipeline, revenue (any date range), win/loss reasons, and activities
- Estimates that allow unique Item creation and don't require contacts to be a Customer

Quick Wins

- Immediately start creating Leads, Opportunities and converting them to Customers directly in BC
- Create Tasks, Log Emails, Log Calls and Log Meetings directly in the Contact Card

Other Features

- Ability to send emails directly from the Contact Card and create plug-and-play templates
- Simple checklists to assist with workflow and tracking

Have You Said

- We want more than just one type of Contact Card to track our prospects
- We want to see how many of our reps are meeting quota and conduct pipeline meetings

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35 Hours to Implement

PROJECT MANAGEMENT

Business Central Gaps

- Jobs can be over complicated for clients that don't need complex WIP reporting
- An admin creates all timesheets each week for users, instead of the user creating their own
- No easy way to follow up with Vendor on a Purchase Order you are waiting on for a Job

Our Solution

- Easily manage Project phases and Tasks for a Project with Time Frames, Estimates, and Actuals
- Track Project time and billing in time sheets/billing modules
- Enable Project calendars, gantt charts, and additional Project reporting for managers and team members
- Users can create their own timesheets and also record time directly from a Project Task itself
- The Project card includes visibility directly on the card for phases and tasks

Quick Wins

- Setup a new Project that automatically creates a Project Dimension for you
- Start using dimensions on Purchasing and Sales documents to track project activity

Other Features

- 5 different billing options on how you would like the Sales Invoice to appear to your Customer for the Project
- 2 financial reports that are automatically filtered to the Project Dimension

Have You Said

- We want a simpler way to track and manage our Projects in BC
- We want better reporting on our new and in-progress Projects

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1 Hour to Implement

ADVANCED USER MANAGEMENT

\\\\\ Business Central Gaps

- No ability to restrict a user's visibility by Master Data filtering
- No easy way to block AR, AP, or GL balances on users who have access to Sales and Purchasing but should not see financials

\\\\\ Our Solution

- Ability to restrict user access to just certain Customers, Vendors, Posting Groups, Dimensions, and GL Accounts
- Ability to block user's visibility to AR, AP, and GL Balances
- More control around Item cost visibility and posting Inventory Journals and Adjustments
- More granular control over which Dimension values a user can select and post to on new and existing transactions
- More granularity when users are viewing Sales, Purchasing, and GL Data

Quick Wins

- Add users and immediately start restricting the data they can see within their available data sets
- Have users test their filtering views
- Immediately see the global filters applied (that the user cannot undo) in data lists

\\\\\ Other Features

- Can define by Customer individually or their Customer posting group
- Can define by Vendor individually or their Vendor posting group

Have You Said

- Do you have a way in BC to restrict access to table records for certain users
- We want to limit access for our users to just certain Customers, Vendors, Posting Groups, Dimensions, etc.

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1 Hour to Implement

AUTO CREATE DIMENSIONS

Business Central Gaps

- No ability to take Master Data and report on it from the GL or keep in sync with Dimension values
- No ability to report on Sub-ledger data like Customer, Vendor, and Item directly from the GL
- No easy way to export/aggregate data based on these Sub-ledger components from GL postings

Our Solution

- Link Master Data records so that Dimension values are created/updated to maintain data sync and integrity
- Report on Customer/Vendor/Item/etc. data from the GL by creating a link to the Dimension value records
- Ability to set the Dimension as required if needed with out of box Dimension options (Same Code, Code Mandatory, No Code)
- Ability to lock default Dimensions and document Dimensions so that users cannot break the automated links

Quick Wins

- Link one of the ACD options to a Dimension of your choice and see how creating and updating will sync to Dimensions
- Recalculate Dimensions after setup to do a 1 time Master Data sync

Other Features

- For clients that implement ACD after go live there is the ability to "recalculate Dimensions" this will back fill all Dimension values from existing Master Data lists

Have You Said

- I wish I could see my Customer, Vendor, or Item data directly in my General Ledger
- Business Central has too many clicks to see which Master Data record this GL entry came from

2 Hours to Implement

CONSOLIDATED SHIPPING

Business Central Gaps

- Processing and visibility of Consolidated Shipments from multiple orders is difficult in BC
- No easy way to print standard Documents for Shipments (Commercial Invoices, BOL, etc.)
- Notifications when Shipments go out do not exist in out of box Business Central

Our Solution

- Ability to consolidate multiple Orders into one Shipment
- View the Consolidated Shipment in one click from any Sales Order that is included
- Option to consolidate Invoices or invoice Orders separately
- Ability to attach pictures to Shipments
- Central location to print Shipping Checklists, Master Packing Lists, Package Labels, Pallet Labels, Bill of Lading, Commercial Invoice, HTS Commercial Invoice, Certificate of Origin and Certificate of Compliance

Quick Wins

- Access to 9 standard Shipping documents, easy to include or exclude them on an Order by Order basis
- Automatic notifications when Shipments go out
- MSO dashboard to handle all Shipments from one central location

Other Features

- Flexibility on Freight Charges and Freight Markup
- Track results of Shipments (date of arrival, delivery result, late delivery reasons, claims)

Have You Said

- We need the ability to combine multiple SOs into one or more Shipments
- We need to print Commercial Invoices or Bills of Lading

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10 Hours to Implement

DISTRIBUTION CONTROL CENTER

\\\\\ Business Central Gaps

- Tough to manage Pick, Pack and Ship from an SO in BC without using Warehouse Documents
- No ability to automatically release to Warehouse when a Sales Order is released
- No easy way for Sales, Customer Service, and the Warehouse to all stay in sync and communicate

\\\\\ Our Solution

- Ability to streamline the Pick, Pack, and Ship process directly from Sales/Customer Service to the Warehouse
- Ability to automatically release Sales Orders to the Warehouse when the Sales Order is released
- Streamlined Purchase Receiving functionality that allows you to add attachments, pictures, and receiver notifications
- Ability to do on the fly Cycle Counts and Inventory Adjustments from handheld devices

Quick Wins

- Auto release to Warehouse workflow
- Item Inquiry and Item Transfer Workflows
- Purchase Order Receiving
- Cycle Counts

\\\\\ Other Features

- Ability to do ad hoc Item inquiries directly from a handheld device
- Print Product Labels
- Ability to work with Business Central and Distribution Control Center from your tablet, phone, or other handheld device

Have You Said

- I need an easier way to work end to end with my Shipping and Receiving departments
- I need a better way to do Item Lookups out on the Warehouse floor

5 Hours to Implement

ADVANCED PURCHASING

\\\\\ Business Central Gaps

- No out of box email templates for Vendor communications in Business Central
- You have to manually add Vendors to the Vendor Item Table on the Item Card
- No way to automatically calculate Vendor Lead Time or Item Reorder Points

\\\\\ Our Solution

- Setup email templates for Quotes, Orders, Invoices, Return Orders, and Credit Memos
- Auto populate data in the Vendor Item Table each time a new combination is used, this data flows through to fact boxes on POs, PQs, and the Item Cards
- Automatically calculate Vendor Lead Time, Vendor Item Lead Time, minimum/maximum Inventory Levels, and Item Reorder Points
- Automatically create Item Stock Keeping Units

Quick Wins

- Only configuration required is for email templates and parameters for the auto calculations
- Tag attached Documents to Purchase Documents to automatically include them in Vendor Communications

\\\\\ Other Features

- Automated follow ups for past due Purchase Orders
- Enhanced ability to generate and email Purchase Quotes directly from a Job, Production Order, Sales Quote, or Sales Order

Have You Said

- We want to generate Quotes directly from a Job, Production Order, Sales Quote or Sales Order
- How can I follow up with Vendors for past due Purchase Orders

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2 Hours to Implement

SHIPRUSH INTEGRATION

\\\\\ Business Central Gaps

- No out of box way to integrate Shipping via Sales Order inside of Business Central
- Tough to push SO information over to Shipping Carriers (UPS, FedEx, etc.) automatically
- No way to automatically integrate Freight Cost and Tracking Number data back into BC

\\\\\ Our Solution

- Easily integrate Sales Order information to ShipRush (Utilizes popular providers like USPS, UPS, FedEx, and DHL)
- Easily pull back Freight Costs from ShipRush with the ability to mark up Freight
- Easily pull back the tracking number from ShipRush to the BC Sales Order
- Easily fulfill Orders in Business Central that are ready to ship
- Print Packing Labels and Packing Slips for your Shipments as part of the ShipRush integration process

Quick Wins

- Add Freight Line on Post, Posting Option and Freight GL Account Number
- Set Freight Markup Percent
- Pull tracking numbers back in to Business Central with bi-directional integration capabilities

\\\\\ Other Features

- Bi-Directionally integrate data between systems
- Allows Freight Collect on Customer Accounts

Have You Said

- We need a way to rate shop and integrate rates, markups, and tracking numbers in Business Central
- Our Sales Order shipping process is very manual and involves multiple applications

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2 Hours to Implement

ADVANCED ASSEMBLY BOMS

\\\\\ Business Central Gaps

- No ability with an Essentials license to utilize Variants in BOMs
- No ability with an Essentials license to do multiple Locations and Location defaults on BOMs
- No ability with an Essentials license to do phantom BOMs that won't be stocked in Warehouse

\\\\\ Our Solution

- Advanced Assembly BOMs gives you the ability to do all of the above with just an Essentials license
- Have the ability to have different Assembly BOMs based on variants of the parent and Sub-assembly Items
- Ability to default the location that the component is going to be pulled from on an Order that can be different than the header
- Ability to disassemble components on the BOM and put them back into Inventory at time of creating the Assembly

Quick Wins

- Start creating BOM Build-outs with Variants, Locations, and start and end dates in your Item's BOM
- Mark Sub-assemblies as Phantom BOMs to avoid needing stock before utilize on an Assembly

\\\\\ Other Features

- Ability to utilize phantom BOMs for Sub-assemblies that need to be created but will never be stocked

Have You Said

- We need to define BOM Locations, Variants, and/or start and end dates, but don't need the Premium license
- We have Sub-assemblies that aren't stocked and find it hard to use Assembly Orders

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5 Hours to Implement

ADVANCED RMA

Business Central Gaps

- No easy process to track Customer and Vendor Returns in out of box Business Central
- No way to track any internal or external communications related to Customer and Vendor Returns in BC

Our Solution

- Generate Return Material Authorization (RMA) cases from Posted Sales and Purchase Invoices to track Customer and Vendor Returns
- RMA will populate with all required information from the Posted Document (Customer/Vendor, Cost/Price, Dates, etc.)
- Communicate with Customers and Vendors using email templates and send automatic notices for Return Receipts, Vendor Credits not received, and RMA Close
- Email RMA forms to Customers and request to Vendors

Quick Wins

- Leverages out of box Return Order functionality in Business Central
- Tag attached documents to Purchase Documents to automatically include them in Vendor Communications

Other Features

- Provide timeline of communication that automatically updates as case is processed
- Process the disposal of Damaged Goods from Customers and issue replacements
- Create Sales & Purchase Return Orders from the RMA to facilitate Receiving/Shipping

Have You Said

- We want a better way to track our Vendor and Customer Returns
- How can I communicate critical information during the Sales and Purchase Return process

ERP Connect Consulting + Business Central Toolbox

1 Hour to Implement

ADVANCED DOCUMENT NUMBERING

Business Central Gaps

- No easy ability to sync unposted and posted Document Numbers
- Tough to have the Quote, Order, and Invoice all sync the base number with an appended value
- No ability to prepend the year of the Document as the starting point for the Document Number

Our Solution

- Sync unposted and posted Document numbers (huge win when it comes to bi-directional integrations)
- Ability to have Sales and Purchase Documents sync the base number plus a sequence at the end (-01, -02, etc)
- Ability to prepend the year as the starting number for the document with a 4 to 7 digit Document number to follow
- Ability to also use Order number plus sequence on Transfer Order Receipts and Shipments

Quick Wins

- Activate Sales and Purchase Posting Options for number syncing activation
- Select how you want to prepend year or append series to Sales and Purchasing Documents

Other Features

- Year can be affixed to Sales or Purchasing Transactions for easy searchability

Have You Said

- We need our unposted and posted Document number to be in sync for bi-directional integrations
- We want our posted Invoice Number to match our Quote and Order number

ERP Connect Consulting + Business Central Toolbox

2 Hours to Implement

ADVANCED DATA IMPORTS

\\\\\ Business Central Gaps

- Large data loads are slow when loading with edit in excel and configuration packages
- Go Live data migrations for open AR, AP, and GL do not have a standardized import template
- Clients typically do not budget enough time for data migration efforts

\\\\\ Our Solution

- Our imports simplify the edit in excel or configuration package process
- We can process data in 10% of the time it takes via the alternatives
- We provide canned templates for open AR, AP, and GL transactions
- This creates a better experience for clients and consultants when migrating data

Quick Wins

- Quickly Import Open AP, AR, and GL into the General Journal
- Utilize our standard import template to get started with converting your data

\\\\\ Other Features

Have You Said

- It takes too long to load data in via configuration packages and edit in excel
- We have over 5000 rows of data we are importing and it is taking too long to load

ERP Connect CONSULTING + BUSINESS CENTRAL TOOLBOX

1 Hour to Implement

ADVANCED DOCUMENT ATTACHMENTS

Business Central Gaps

- No convenient drag-and-drop to attach Documents in Business Central out of box
- Attached Documents are stored in the internal database (limit of 80 gigabytes)
- Additional storage comes at a price

Our Solution

- Drag and Drop Documents anywhere there is a Document Attachment function
- Enhanced Document listing and direct download from fact box (rather than going to the drill down page)
- Ability to save and retrieve Documents from Azure Blob Storage (ABS) instead inside the Business Central Database

Quick Wins

- Immediate drag-and-drop feature on all Document attachment pages

Other Features

Have You Said

- We want an easy way to drag and drop Documents
- We want a more cost effective way to store our Documents in BC

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2 Hours to Implement

TIMECLOCK

\\\\\ Business Central Gaps

- No way in Business Central out of box to record Payroll time
- No way to export feed to external Payroll in BC

\\\\\ Our Solution

- Allow users to clock in and clock out for Start/End of Day and Start/End of Breaks
- Allow users to book time to Projects, Work Orders, Service Orders, Production Orders, and Jobs
- Option to do auto-break recording for Lunch and Breaks
- Option to “Snap” times to 15 min increments
- Record other Time Entries for Vacation, Sick Day, etc
- Ability to approve Time Journals for Payroll submission

Quick Wins

- Immediately start being able to use Clock In and Clock Out
- Immediate access to who's here/who's not Dashboard

\\\\\ Other Features

- Ability to see who clocked in for the day and who showed up late/early
- Submit Payroll for ADP and Gusto Payroll via Excel Export
- Book time from your computer, tablet, or phone where Business Central is available

Have You Said

- We want to track clock time without having to use a 3rd party tool
- We want an easy way to track our hourly and salaried employees

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5 Hours to Implement

HELP DESK

\\\\\ Business Central Gaps

- No way to track IT support in out of box Business Central
- Third party Ticket systems don't integrate with BC

\\\\\ Our Solution

- Ability for IT Department to have Ticket system inside of BC
- Track Support, Maintenance, and Project Tickets
- Users can create Tickets directly from pages in BC, and the Tickets are linked to that page/record
- Support Agents can go directly to the page/record that the support was for
- Track Tickets to the User and Devices to see historical trends
- Tickets have Rich Text descriptions including adding screen shots of errors

Quick Wins

- Users can start submitting Tickets immediately
- Begin to track analytics for your support

\\\\\ Other Features

- User has option to confirm completion of Ticket along with survey about performance of IT staff
- Manager Dashboard to analyze Ticket performance and activity levels to see trends

Have You Said

- We want an easy way to track systemic vs single case user issues with workstations or devices
- We want to see what issues are the most common in our business

10 Hours to Implement

LEARNING MANAGEMENT SYSTEM

\\\\\ Business Central Gaps

- No easy way to build training Courses for your team/community natively in BC
- No way to track who has taken what Courses or gotten training in Business Central
- No way to track testing and pass/fail on Courses

\\\\\ Our Solution

- Create Courses directly inside of Business Central
- Link Courses to strategic pages in BC to give easy access to training materials
- Course can be self-paced, classroom, or Teams directed
- Courses can have a multi-answer test administered after completion of the Course
- Track user participation and allow for tracking Course certification by user

Quick Wins

- Ability to start creating Courses directly in Business Central

\\\\\ Other Features

- Auto schedule refresher class on anniversary of completion of the Course
- Track International Organization for Standardization (ISO) certifications

Have You Said

- We want an easy way to provide and track training for our users
- We want easy access to see what users are certified in certain Courses

ERP Connect Consulting + Business Central Toolbox

5 Hours to Implement

DISPATCH MANAGEMENT

\\\\\ Business Central Gaps

- No way to manage Deliveries in Business Central out of box
- No way to assign routes and drivers to Sales Orders
- No way to do paperless sign-off from Customers on a Delivery

\\\\\ Our Solution

- Schedule/Track/Administer the delivery of SOs, Purchase Returns, Transfer Orders along with the Pick up of POs, Sales Returns, and Transfer Orders
- Build Routes into your Dispatch Schedule to manage Deliveries on multi-truck Departments
- Assign Drivers to routes or dispatches and track their activity
- “Best Route” option for Dispatch with Google Maps integration
- Option to print Delivery Tickets or provide tablets to drivers to go paperless/capture signatures electronically

Quick Wins

- Do ad-hoc Deliveries to Customers directly in Business Central

\\\\\ Other Features

- Auto communication when Customers are pending Deliveries while driver is on route
- Ability to post Shipment/Invoice and email Customer delivery results from driver tablet
- Deliver multiple packages/SOs at the same time with one Delivery Ticket/Signature

Have You Said

- We want to be able to do Delivery and Pickup tracking
- We want to electronically capture signatures from the client

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35 Hours to Implement

WORK ORDER MANAGEMENT

Business Central Gaps

- No ability to do Work/Service Orders in base Business Central (Premium license needed)
- No ability to do in-house as well as in-the-field Service Orders
- No easy way to facilitate paperless Work Orders via technician

Our Solution

- Similar to Service Orders without the Premium license requirement
- Allows you to do traditional Work Orders for services provided
- Ability to do in-house Work Orders/in-the-field Work Orders
- Work Orders can be repair/maintenance of Service Items or ad hoc work with Labor and Items
- Work Orders w/Item Planning to generate Special Order POs
- Create Estimate Work Orders that easily convert to Actual Work Orders

Quick Wins

- Start building Work Orders directly in Business Central

Other Features

- Create Repetitive Work Orders for follow up Service, Maintenance, or Recurring Services
- Generates Standard Sales Invoices with all the details on posting
- Track Technicians to Work Orders and Schedule activities with Graphic Scheduler

Have You Said

- We want to do Work Orders without Premium licenses
- We want to do paperless signature capture from clients

ERP Connect Consulting + Business Central Toolbox

2 Hours to Implement

PAYMENT PLANS

\\\\\\\\\\ Business Central Gaps

- No way to do Payment Schedule for a Customer
- No visibility into AR Aging and Cash Forecast for Customer Payment Plans in BC
- No way to change Payment Schedule on posted Sales Invoice

\\\\\\\\\\ Our Solution

- Allows you to create a Payment Schedule for Clients in Business Central
- Create Installment Payments off Sales Orders and Invoices
- Splits your AR into appropriate Schedule so that AR Aging is properly reported
- Allows you to change Payment Schedule after posting so that you can arrange past due Payments

Quick Wins

- Immediately create Payment Plans on posted Invoices

\\\\\\\\\\ Other Features

Have You Said

- We want to be able to do Scheduled Payments for our clients
- We want to be able to change Payment Schedules on Sales Invoices already posted

ERP Connect CONSULTING + BUSINESS CENTRAL TOOLBOX

1 Hour to Implement

ADVANCED ITEM TRACKING

\\\\\ Business Central Gaps

- No ability to enter Lot Number directly on Purchase Orders and Sales Orders in out of box BC
- No easy way to generate Lot Number or Serial Number on Purchase Orders

\\\\\ Our Solution

- Auto Generate Lot Number and Expiration Date on Warehouse Receipts
- Auto Generate Lot Number and Expiration Date on Purchase Receipts
- Sync Serial Number from Purchase Order to Sales Order for Special Orders
- Auto Generate Serial Number Series on Sales Shipments
- Auto Generate Serial Number Series on Purchase Receipt

Quick Wins

- Enter Lot Numbers on Purchase Orders and Sales Orders

\\\\\ Other Features

Have You Said

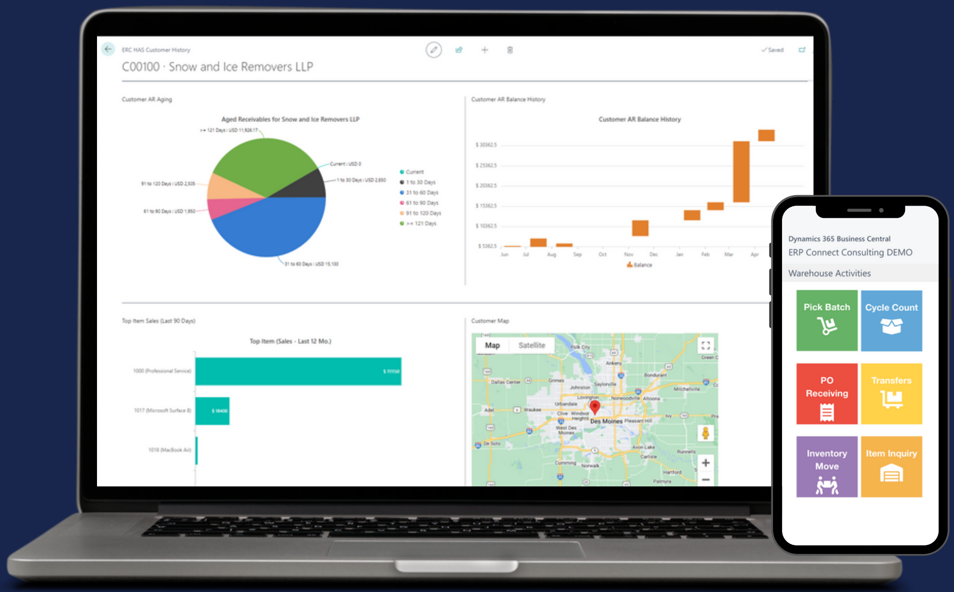
- We want an easy way to enter Lot Number on Purchase Order Receipt
- We want an easy way to enter Lot Number on Sales Order Shipment

PROJECT MANAGER CHECKLIST

ACTIVITIES	OWNER
Partner fills out Client Intake Form for ERP Connect	PARTNER
ERP Connect sends extension info to Partner (unless Partner has info)	ERP CONNECT
Partner does demo and discovery with Client to determine fit	PARTNER
Partner does testing in Client sandbox with an extension free trial	PARTNER
Partner notifies ERP Connect if Client would like to purchase extension	PARTNER
Partner purchases extension or bundle on ERP Connect's Website	PARTNER
Partner fills out Customer Onboarding Form with Client information	PARTNER
Partner watches Activation Video and sends Tenant ID to ERP Connect	PARTNER
ERP Connect sends Partner over Activation Keys for Sandbox and Prod	ERP CONNECT

BUSINESS CENTRAL
TOOLBOX
— by ERP Connect —

THE BC TOOLBOX



Thank you for your commitment to streamlining Business Central for your users.

F O R   P R I C I N G

W W W . B C T O O L B O X . C O M