



Microsoft Dynamics 365 Business Central Capabilities

Sales Management



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Sales and Marketing

Contact Management

Maintain an overview of your contacts and personalize your approach to them. Record contact information for all business relationships, and specify the individual people related to each contact. Be alerted if you enter duplicate contact information. Get a precise view of prospects and customers by categorizing your contacts based on weighted profiling questions (assign the weights of two questions to identify the value of a third question). Divide customers into ABC segments and even use this module for rating. Use the information to target contacts for campaigns. Issue quotes to prospects and create sales documents for specific contacts.

Campaign Management

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

Interaction and Document Management

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

Email Logging for Microsoft Exchange Server

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

Opportunity Management

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

Sales and Marketing

Microsoft Dynamics Sales integration

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

Use an assisted setup guide for help setting up the integration and coupling records in Business Central with corresponding records in Sales.

Work with prices in currencies that differ from the local currency, using the coupling of the Customer Price Group record in Business Central with the Price List in Sales.

Sales and Delivery

Sales Invoicing

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

Sales Order Management

Manage sales quotes, blanket sales orders, and sales order processes. Create partial shipments, ship and invoice separately, create prepayment invoices for the sales order, and use quotes and blanket orders.

Sales Line Pricing and Discounting

Manage flexible item price and discount structures that differentiate between special agreements with customers and customer groups and are conditioned by parameters such as minimum quantity, unit of measure, currency, item variant, and time period.

Offer the lowest price on sales lines when the sales order meets the conditions you specify on for sales prices. Update the price agreements by using the sales price worksheet.

Campaign Pricing

Connect sales prices and sales line discounts to sales campaigns to give special pricing and discounts to customers and contacts in campaign segments. Specify periods for which prices are valid. Apply campaign pricing and discounts to sales and service orders.

Sales Invoice Discounts

Calculate invoice discounts automatically. Set up any number of invoice discount terms, including a certain minimum amount, discount percentage, and/or a service charge. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice. Calculations can be done in both local and foreign currencies.

Alternative Shipping Addresses

Set up multiple ship-to addresses for customers who receive goods at more than one site. The person creating a sales order or invoice can specify exactly where to send it.

Sales and Delivery

Sales Return Order Management

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

Bulk Invoicing from Microsoft Bookings

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



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Service Management



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Service Management

Planning and Dispatching

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

Service Contract Management

Set up agreements with the customers about service levels:

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

Service Item Management

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

Service Order Management

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

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

Service Price Management

Set up, maintain, and monitor service prices. Set up price groups based on criteria, such as the service item (or several item groups), the service tasks, or the type of fault for a period of time or for specific customers or currencies. Define price calculation structures that include all parameters involved in providing service, such as the parts used, the types of work, and the service charges. Automatically assign the correct price structure to service orders that match the price group criteria. Assign fixed prices, minimum prices, or maximum prices to price groups and view statistics about profitability.



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