Microsoft Dynamics 365

E JEWELRY
Powered by Microsoft 365

Microsoft Dynamics 365 Business Central Capability Guide & e-Jewelry Features

Welcome to Dynamics 365 Business Central

Are you struggling to manage your growing business across finance, sales, service, and operations teams? Over the last decade, the way we work, where work is done, and business models have change exponentially. Now is the time to move to the cloud and get the right solutions in place to empower your people to deliver more value to your customers-no matter where they are working from. This quick-start guide provides a high-level overview of the capabilities within Microsoft Dynamics 365 Business Central.

The guidance here will allow you to assess your business's unique nuances and identify the next steps to selecting a comprehensive business management solution. Business Central provides the collaborative capabilities needed to connect your teams using a single solution, so everyone across the organization is empowered to adapt faster, work smarter, and perform better.

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Business Central Essentials

Business Central Essentials provides a wide range of operational and management capabilities, including:

- Financial Management
- AI-Supported Forecasting
- Customer Relationship Management
- E-Services
- Human Resources Management
- Project Management
- Supply Chain Management
- Warehouse Management and Inventory

Business Central Essentials capabilities

Financial Management			
Account Schedules	Basic XBRL	Deferrals	Responsibility Centers
Allocations	Budgets	Electronic Payment/Direct Debits[1]	Unlimited Dimensions
Bank Account Management	Cash Flow Forecast	Fixed Assets	
Bank Reconciliation	Check Writing	Multiple Currencies	
Basic General Ledger	Consolidation	Payment Handling	
Advanced Financial Management			
Cost Accounting	Intercompany Postings		
Artificial Intelligence[2]			
Cash Flow Forecast	Late Payment Prediction	Image Recognition	Inventory Forecast
Sales Forecast			
Customer Relationship Management			
Business Inbox for Outlook	Contact Classification	Email Logging	Relationship Management
Campaign Management	Contact Management	Interaction/Document Management	Task Management
Campaign Pricing	Dynamics 365 Sales Integration[3]	Opportunity Management	
E-Services			
Bank Feeds (US, CA)	Document Management, Document Capture	Online Map	Tax. Reg. No. Validation Service (EU)[1]
Document Exchange Service		PayPal	
Human Resources Management			
Basic Human Resources			
Project Management			
Basic Resources	Job Quotes	Project Management Jobs	
Capacity Management	Multiple Costs	Time Sheet	
Supply Chain Management			
Alternative Order Addresses	Item Attributes	Purchase Invoicing	Sales Line Pricing
Alternative Ship-To Addresses	Item Budgets	Purchase Line Discounting	Sales Order Management
Alternative Vendors	Item Categories	Purchase Line Pricing	Sales Return Order Management
Assembly Management	Item Charges	Purchase Order Management	Sales Tax/VAT[4]
Basic Inventory	Item Cross References	Purchase Return Order Management	Shipping Agents
Basic Payables	Item Substitutions	Requisition Management	Standard Cost Worksheet
Basic Receivables	Item Tracking	Demand Forecasting	Stock keeping Units
Calendars	Location Transfers	Sales Invoice Discounts	Vendor Catalogue Items
Cycle Counting	Multiple Locations	Sales Invoicing	
Drop Shipments	Order Promising	Sales Line Discounting	
Warehouse Management and Inventory			
Automated Data Capture System	Internal Picks and Put Aways	Warehouse Shipment	Warehouse Receipt
Bin Set-Up	Pick	Warehouse Management Systems	
Other Capabilities			
Analysis Reports	Intrastat[1]	Retention Policies	Workflow
Change Log	Job Queue	Unlimited Companies	Word Reporting/Document Reporting
Embedded Power BI	Notifications (On-Premises Only)	User Management	
Extended Text	Reason Codes	User Tasks	

[1]For feature availability in your region, consult https://docs.microsoft.com/en-us/dynamics365/business-central/about-localization
[2]Requires Intelligent Edge or Azure Machine Learning subscription
[3]Dynamics 365 Sales Integration requires a Dynamics 365 Sales license
[4]Support for sales tax or VAT depending on country of deployment

➢ Business Central Premium

Business Central Premium is licensed by assigned user and includes all Essentials license capabilities plus Service Order Management and Manufacturing.

Business Central Premium Additional Capabilities

Service Order Management		
Planning and Dispatching	Service Item Management	Service Price Management
Service Contract Management	Service Order Management	
Manufacturing		
Agile Manufacturing	Finite Loading	Production Orders
Basic Capacity Planning	Machine Centers	Sales and Inventory Forecasting
Basic Supply Planning	Production Bill of Materials	Version Management

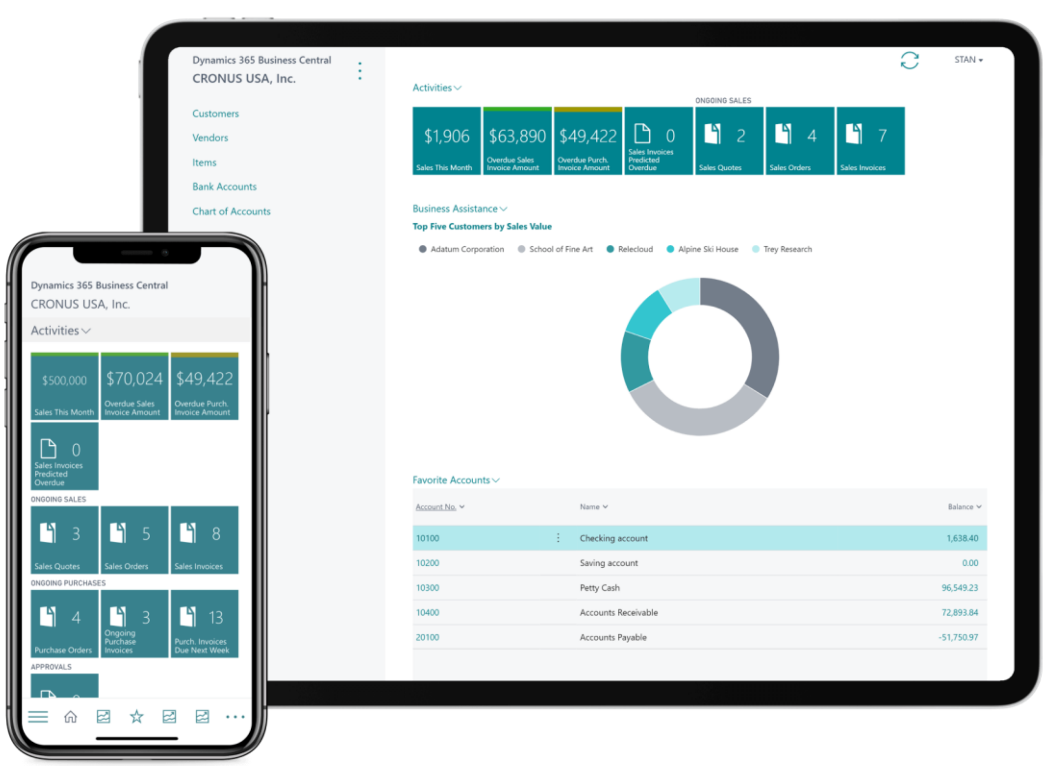
Essentials and Premium user licenses include:

- 3 External Accountant licenses for organizations with third-party accountants who wish to connect to Business Central. External Accountant licenses provide all the same use rights as assigned Business Central licenses except access to user set up or administrative tasks.
- Unlimited companies.
- 1800 seconds (30 minutes) per tenant of access to Cortana Intelligence, which can compile data from avariety of sources to deliver more actionable insights and analytics.

Configuration components

Business Central licenses include the following configuration components. Customers choosing to exercisetheir [dual use rights] receive the full custom objects range numbered 50,000 – 99,999

Configuration and Development					
Codeunits	Pages	Queries	Reports	Tables	XML Port



Financials

Accelerate financial close, improve forecasting, and get real-time performance metrics while fostering compliance and security across subsidiaries.

General ledger

Set up companies and post to the general ledger though general journals. Use features for VAT and sales tax, recurring journals, and background posting of journals. Posting and reporting can be done in one additional reporting currency.

Use built-in reports, customized reports (both RDCL and Word), and easily refresh data in Microsoft Excel, and Power BI reports and charts.

View and edit the data in most general ledger pages using Microsoft Excel.

Dimensions

Use unlimited dimensions in transactions in all ledgers for important parts of your business, such as departments, projects, sales channel, and geographical areas. Set up rules for how to combine dimensions and dimension values. Control the use of dimensions and increase the reliability of output based on dimensions. Assign default dimensions values to master data such as general ledger accounts, customers, vendors, fixed assets, resources, and items. Set up rules to prioritize the use of default values.

Use data from dimensions in reports for filtering, account schedules to analyze your general ledger, and in data sent to Power BI.

Multiple currencies

Conduct business with customers and vendors in any number of currencies. Use multiple currencies on sales and purchase documents, bank transactions, and payables and receivables payments. Store currency details for transactions in receivables, while payables are stored in local and foreign currencies. Adjust currency values in local and foreign currencies for unrealized gains and losses to keep aging reports correct for receivables and payables.

Budgets

Track business progress using budgets in the general ledger. Use budgets in financial reports, user-defined analysis in account schedules, or in data sent to Power BI for data sharing and analysis.

Import budget information to and from Microsoft Excel for enhanced calculation capabilities when you prepare budgets.

Cost accounting

Gain insight into costs through the visibility of actual and budgeted costs of operations, departments, products, and projects. Combine base data in general ledger transactions with dimensions with known future costs and define a hierarchy of cost centers and cost objects. Allocate costs using allocation runs with different allocation keys and methods.

Analyze general ledger actuals and budgets in user-defined scenarios. Explore the scenarios to gain insight into the business that are not immediately reflected in your chart of accounts.

Deferrals

Set up deferral templates that automate the process of deferring revenues and expenses based on a schedule. Recognize revenues and expenses in periods other than the period in which the transaction is posted.

Financials: Multi-site capabilities

Consolidation

Consolidate companies from the same Business Central tenant and pull data directly into the consolidation company. Or use XML files to pull data from other Business Central tenants, databases, or third-party business management application. Use multiple currencies, dimensions, and budgets for consolidations.

Intercompany postings

Manage accounting for more than one company in a posting process that includes one or more Business Central tenants or databases. Send sales and purchase documents to partner companies and post journals transactions through a mapping to shared charts of accounts and dimensions. Control the document flow through an Inbox/Outbox feature that automates sending and receipt. Use sales and purchase documents with multiple currencies to reconcile intercompany balances.

Fixed assets

Track fixed assets such as buildings, machinery, and equipment. Post fixed-asset transactions such as acquisitions, depreciation, write-downs, appreciation, and disposal. Assign one or more depreciation books to define methods and conditions for calculating depreciation. Use depreciation books to meet managerial, internal accounting, and legal reporting requirements. Register maintenance costs, insurance coverage, and cost allocations for assets.

Fixed assets allocation

Use allocation keys to distribute percentages of fixed asset transactions, such as acquisition cost and depreciation, to departments or projects.

Fixed assets insurance

Track insurance coverage and annual insurance premiums for fixed assets and easily determine whether they are under- or over-insured. Attach assets to one or more insurance policies and index insurance amounts.

Fixed assets maintenance

Record maintenance and service expenses for fixed assets. Get detailed information to analyze and make decisions about fixed asset renewal and disposal.

Financials: Cash management

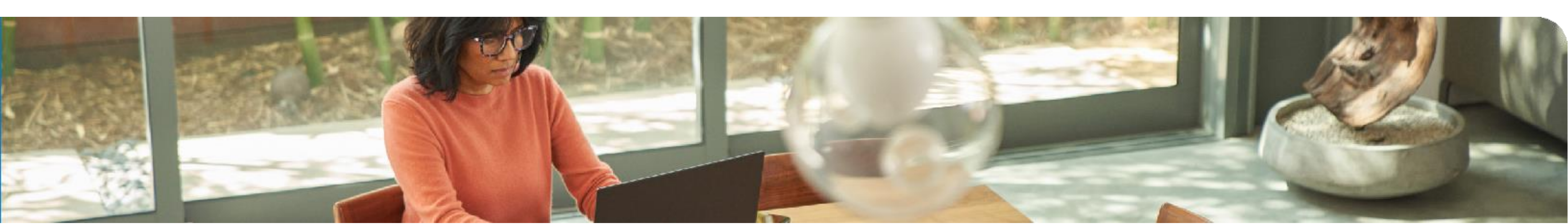
Bank account management

Create, operate, and manage multiple bank accounts for diverse business needs and different currencies.

Cash flow forecast

Predict how your company's liquidity will evolve over time. Forecast expected cash receipts and disbursements plus available liquid funds.

Create basic cash flow forecasts that can be extended and adjusted. Use an assisted setup guide to complete tasks and take advantage of automatic daily or weekly data updates. Include data from jobs and taxes as sources for the cash flow forecast. Use Azure ML capabilities to generate cash flow predictions using Business Central data.



Financials: Cash management (continued)

Electronic payments and direct debits

Create payment proposals based on vendor documents and generate bank payment files in ISO20022/SEPA format. Or use the AMC Banking Service to generate electronic payment files in the format your bank requires. Create direct debit collections for a bank direct debit file in ISO20022/SEPA format.

Easy payment process for your customers

Provide efficient payments submissions to your customers by adding online payment services links to invoices in Business Central (online version only).

Use the PayPal extension for access to a trustworthy global payment service that offers multiple ways to accept payments, including credit card processing and PayPal accounts.

Reconciliation of incoming and outgoing bank transactions

Import bank transaction data from electronic files sent from your bank in ISO20022/SEPA format or other file types. Apply transactions automatically to open customer and vendor ledger entries and create your own matching rules. Review proposed applications and account matches. Change the algorithm behind the record matching by modifying, removing, or adding rules.

Reconcile bank payments from the Payment Reconciliation Journal in one step, and in one place.

Bank account reconciliation

Import bank statement data from electronic files sent from you bank in ISO20022/SEPA format or other file types. Reconcile bank statement data automatically to open bank account ledger entries and keep track of all bank statements.

Filter bank statement information to view only the transactions that need attention. Summarize outstanding bank information and drill-down to the details of each bank transaction.

Check writing

Print checks as automated electronic checks or to write them manual, both with flexible options for voiding, reprinting, using check forms with preprinted stubs, and testing before printing. Consolidate payments to a vendor in a single check.

Reporting and data analysis

Small and mid-sized companies reply on built-in analytics and reporting that they can use out-of-the-box to help keep track of their business. Business Central supports common business processes and more complex processes for such organizations. Each of these processes comes with reports and analytics tools, and you can also do ad-hoc analysis directly from your Home page. To get an overview of Reporting and data analysis features in Business Central, please visit **https://aka.ms/bcreporting**

Financial reporting (Accounts schedules)

Use account schedules as a powerful financial reporting tool. Accountants and controllers can include essential business data from the chart of accounts, budgets, cash flow accounts and cost types in financial reports.

Use the data to efficiently monitor the health of the business and provide valuable input for business decision makers. Define row and column layouts and combinations to generate the report you need. Calculate totals and sub-totals and control the print output, for example, to compare current and historical budget figures.

Sales

Empower your sales team to take better care of customers by estabilishing best practices using familiar productivity tools to managing the entire sales process from within Microsoft Outlook.

Contact management

Maintain an overview of your contacts and personalize your approach to each one. 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 rate results to target contacts for campaigns. Easily create quotes for prospects and send 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 native 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.

Better together with Microsoft Dynamics 365 Sales

Enable integration between Dynamics 365 Business Central and Sales for a more efficient lead-to-cash process. Empower 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 the assisted setup guide connect Business Central with corresponding records in Sales.

Work with prices in currencies that differ from the local currency, using the coupling of the sales price list record in Business Central with the price list in Sales.

Check for available product inventory directly from Sales and synchronize sales orders to Business Central for fulfillment, invoicing and payments.

Sales: Delivery management

Sales invoicing

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

Sales order management

Manage quotes, blanket orders, and 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 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 prices and 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 return order management

Create return orders to compensate customers who received incorrect or damaged items. Then receive returned items and link 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 Microsoft Bookings in Office 365, it's possible to do bulk invoicing. 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.

Supply chain management

Deliver products on time and adapt to changing business models with visibility across purchasing, manufacturing, inventory, and warehouses.

Purchase invoicing

Set up, post, and print purchase invoices and purchase credit memos.

Purchase order management

Manage quotes, blanket orders, and purchase order processes. Creating a purchase order differs from creating a purchase invoice directly. The quantity available is adjusted as soon as an amount is entered on a purchase order line, but it is not affected by a purchase invoice until it is posted. Easily manage partial receipts, receive and invoice separately and create prepayment invoices for the purchase order, use quotes and blanket orders in the purchase phase. Quotes and blanket orders do not affect inventory figures.

Purchase return order management

Create a purchase return order in order to compensate your own company for wrong or damaged items. Items can then be picked from the purchase return order. You can set up partial return shipments or combine return shipments in one credit memo and link purchase return orders with replacement purchase orders.

Alternative order addresses

Set up multiple addresses to manage orders from vendors who have more than one shipping site. These additional locations can then be selected by the purchasing agent when creating a purchase order or invoice.

Purchase invoice discounts

Calculate invoice discounts automatically. The discount can differ from vendor to vendor with different minimum amounts (also in different currencies) and different rates, depending on the size of the invoice. The discount is calculated on the individual item lines and becomes part of the net sum of the invoice.

Purchase line discounting

Manage multiple item negotiated purchase price discounts as based on such parameters as minimum quantity, unit of measure, currency, item variant and time period. The best unit cost, as based on the highest discount, is calculated for the purchase line when the order details meet the conditions specified in the purchase line discounts table.

Alternative vendors

Manage purchase of the same item from different vendors. Set up alternative vendors for items, specify typical lead times, and record price and discount agreements with each vendor.

Vendor catalog

Offer items to customers that are not part of regular inventory, but can be ordered from vendors or manufacturers on a one-off basis. Register these items as non-stock items but treat them like regular items.

Supply chain management: Inventory control

Inventory management

Set up stock items and specify properties such as unit of measure, costing method, inventory posting group, and unit cost and price. Post item transactions, such as sales, purchase, and negative and positive adjustments from item journals. Store quantity and cost records of posted transactions in the inventory ledger, and use it as the basis for valuation and other costing calculations.

Set up non-inventory and services in the same way as stock items and use them in sales, purchase, or consumption transactions, but without need to keep track of stock and costing.

Item categories

Group items in a hierarchy and define custom categories that include specific attributes.

Item attributes

Add custom data, such as color, country of manufacture, size, or product dimensions, to applicable items, to supplement built-in global item fields. Use Azure AI to let Business Central analyze images of your items and automatically suggest attributes.

Define types of attribute options, including list and text, and integer and decimal that can include units of measure. Translate attribute names and options to multiple languages.

Block attributes or attribute options from being used, if for example, they no longer are applicable.

Item tracking

Manage and track serial and lot numbers. Assign serial or lot numbers manually or automatically, receive and ship multiple quantities with serial or lot numbers from a single order line entry.

Use the additional customizable item tracking dimension to keep track of simple WMS packages or pallets.

Multiple locations

Manage inventory in multiple locations, such as production plants, distribution centers, warehouses, show rooms, retail outlets, and service cars. Inventory on each location can have its own location-specific financial dimensions or posting rules. Enable CFO or financial leaders to get information about inventory using financial reporting.

Stock-keeping units

Manage stock-keeping units (SKUs). Identical items with the same item number can be stored in different locations and managed individually at each location. Add cost prices, replenishment, manufacturing information, and so on, based on the location.

Item variants

Item variants are a great way to keep your list of items under control, especially if you have a large number of items that are almost identical—for example, when they vary only in color. Rather than setting up each variant as a separate item, you can set up one item and then specify the various colors as variants of the item. Variants are supported in all areas of product including manufacturing and planning, unlocking scenarios in industries where for example, inventory is tracked by revision.

Location transfers

Track inventory as it moves from one location to another. Account for the value of inventory in transit and at various locations.

Shipping agents

Set up multiple shipping agents (for example, UPS, DHL, external carriers, or your own carrier) and relate their services (express, overnight, standard) with shipping time. Associate default shipping agents and their services with individual customers or specify those details on sales orders and transfer orders to improve accuracy of order promising.

Supply chain management: Inventory control (continued)

Calendars

Set up calendars with working and non-working days. Assign a base calendar to customers, vendors, locations, companies, shipping agent services, and the service management setup and make changes when needed. Use calendar entries in date calculations on sales, purchase, transfer, production, and service orders, and the requisition and planning worksheets.

Item charges

Manage item charges. Include the value of additional costs such as freight or insurance in the unit cost or unit price of an item.

Item references

Identify the items a customer is ordering based on item numbers other than your own. Store and easily access cross-reference information from customers, vendors, and manufacturers, as well as generic numbers, universal product codes (UPCs), and European article numbers (EANs).

Item substitutions

Link items that have the same or similar characteristics to suggest alternatives for out-or-stock items on orders. Provide extra service to customers by offering lower-cost alternatives.

Item budgets

Define sales and purchase budgets on the customer, vendor, and item levels. Prepare and record a sales budget that can serve as input to decision makers in operational areas such as purchasing and logistics. Get information about expected demand and use it in business discussions with customers.

Finalize budgets and track the actual sales performance by calculating the variance. Export budget figures to Excel for flexible calculations in the budgeting process.

Analysis reports

Provide decision makers with insightful details that inform day-to-day decisions regarding sales, purchases, and product portfolio management. Build on item entries to provide customizable analytics that let you add and combine analysis objects, such as customers, items, and vendors, according to your needs.

Cycle counting

Manage cycle counting to verify inventory record data used to maintain and increase inventory accuracy. You can set up cycle counting on the item or SKU level.

Supply Chain Management: Planning and availability

Supply planning

Plan material requirements based on demand with support for master production scheduling and materials requirements planning. Generate optimal suggestions for replenishing inventory transfers based on the item's current and future demand and availability, as well as a variety of planning parameters, such as minimum and maximum quantities and reorder quantities.

Use automatic orders for assembly, purchase, production, and transfers, and action messages to balance supply and demand. Use time buckets when planning material requirements.

Demand forecasting

Manage demand forecasting based on items. Input demand (sales) forecasts for products and components in a more convenient way (daily, monthly, quarterly). Create production and purchase orders that consider the demand forecast, available inventory, and plan requirements.

Supply chain management: Planning and availability (continued)

Sales and inventory forecasting

Get deep insight into potential sales and a clear overview of expected stock-outs by using the Sales and Inventory Forecast extension. Leverage its built-in Azure AI capabilities to generate reliable forecasts that make it easier to manage replenishment.

Order promising

Promise accurate order shipment and delivery dates based on an item's current and future availability. When items are not available to meet a customer's requested delivery date, calculate the earliest shipment date as either an available-to-promise date that is based on upcoming uncommitted supply or a capable-to-promise date, which is when items can become available.

Drop shipments

Handle orders that ship directly from the vendor to the customer without having to physically stock items in your inventory. Keep track of order costs and profit. Link sales orders to purchase orders to control the sequence of posting tasks.

Order planning

Plan supply for all types of demand on individual orders using a simple supply planning tool.

Calculate availability on the fly

Once quantity is entered in any type of order: purchase, sales, production or transfer, the system immediately updates the availability information, notifying the user who enters the order about current and future situation. Be fully equipped with information about inventory availability by date, event, variant, location, even bill of material and unit of measure.

Project management

Ensure successful project execution and profitability with planning, resourcing, tracking, costing, billing, accounting, and real-time intelligence.

Basic resources

Keep track of resources and prices. Register and sell resources, combine related resources into one resource group, or track individual resources. Divide resources into labor and equipment and allocate resources to a specific job in a time schedule.

Capacity management

Plan capacity and sales and manage usage statistics and the profitability of resources. Create your plan in a calendar system with the required level of detail and for the period you need. Monitor resource usage and get a complete overview of resource capacity including availability and planned costs on orders and quotes.

Multiple costs

Manage alternative costs for resources and resource groups. Costs can be fixed, percentage based, or an additional fixed charge. Define as many work types as you need.

Jobs:

Track usage on jobs and data for invoicing the customer. Manage fixed-price jobs and time-and-materials jobs:

Create a plan for a job with multiple tasks and task groupings. Each task can have a budget and can be done for whatever period you need.

Copy a budget from one job to another and set up a job-specific price list for item and resource charges and general ledger account expenses for the customer.

View suggested WIP and recognition postings for a job.

Plan and invoice job in multiple currencies.

Project management (continued)

Assign a specific job to a specific customer and invoice the job completely or partially.

Change bill-to customer for projects where the party that is receiving a service is different from the party that is paying the bill.

Use an assisted setup guide to set up jobs, easily enter time sheets and job journals, and use the Project Manager Role Center to access common tasks, new charts, and the list of your jobs.

Use the Job page to access tasks, assign job ownership, and get visibility into costs and billings.

Use the Job Quote report to quickly email a customer the price for a project.

Split work between project managers, who create plan for job, warehouse workers who deal with picking inventory for jobs and staff performing the work.

Time sheet

Register time spent and get manager approval using the simple and flexible Time Sheet. Time Sheet integrates with Service and Project Management and can include resources.

Service management

Deliver better service experiences with planning, dispatching, and service contract 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 management (continued)

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.

Warehouse management

Reduce operations costs with efficient warehouse operations that help you ship orders on time and deliver on promised customer outcomes.

Levels of warehouse management

Configure warehouse processes as required for each location. Decide whether to use bins or not, should warehouse team work with separate documents or update sales and purchase orders. Should pick and shipment be separate steps or can be performed in one go.

Bin

Organize your warehouse by assigning items to bins, the smallest unit in the warehouse logical structure. Use item journals to assign bin directly on document lines. Default or fixed bins will speed up document processing.

Bin setup

Set up and maintain bins by defining both the layout of your warehouse and the dimensions of your racks, columns, and shelves. Give input to planning by defining characteristics for bins.

Inventory pick and inventory put-aways

Create pick lists from sales orders and put-away work from purchase orders to assign tasks to warehouse team, who can complete picking and put away work without opening sales and purchase orders.

Warehouse receipt

Manage receipts from a separate user interface in a multi-order environment. Create a put-away work directly from warehouse receipts or use put-away worksheet to create multiple put away tasks.

Warehouse shipment

Manage warehouse shipments from a separate user interface in a multi-order environment. Create picking lists from shipments or pick worksheet

Warehouse management (continued)

Internal pick ups and put-aways

Create pick and put-away orders for internal purposes, such as testing put-away for production output, without using a source document (such as a purchase order or a sales order).

Directed pick up and put-away

Receive and put away items in bins according to put-away templates, and pick items based on zone and bin rankings. Use worksheet to move items between bins to optimizes the picking process and the use of space. Avoid wasting time by utilizing cross-docking. Deal with different units of measures for same items.

Manufacturing

Enable proactively manufacturing operations to improve throughput, quality and uptime, while reducing costs and delivering on customer expectations.

Assembly management

Specify a list of sellable the items, raw materials, sub-assemblies, and resources as an assembly bill of materials that make up a finished item or a kit. Use assembly orders to replenish assembly items. Capture customer requirements for the kit’s bill of materials directly from sales quotes, blanket orders, and order lines in the assembly-to-order processes.

Standard cost worksheet

Give company controllers a reliable and efficient way to maintain accurate inventory costs. Work with standard cost updates in Business Central in the same way you would in an Excel spreadsheet. Prepare for cost updates without changing data until you’re ready.

Product bill of materials

Create bills of materials and calculate their standard costs. Keep track of different versions and know which components were valid at a specific moment of time and for specific production batch.

Basic capacity planning

Add capacities (work centers) to the manufacturing process. Set up routings for production orders and material requirements planning. View loads and the task list for the capacities.

Machine centers

Add machine centers as capacities in the manufacturing process. Manage capacity for each machine or production resource on a detailed level for machine centers, and on a consolidated level for work centers. Use machine centers to store default information about manufacturing processes, such as setup, wait, and move times and default scrap percentages.

Version management

Create versions of manufacturing bills of materials and routings.

Production orders

Create production orders and post consumption and output. Calculate net requirements based on production orders. Use a manual supply planning tool as an alternative to automatic planning. Get visibility and tools to manually plan for demand from sales lines and to create supply orders.

Automatic components and capacity consumption

Reduce data entry, and have accurate stock and WIP information in the same time. Use routing codes to link components with specific operation to minimize waste by implementing just-in-time principles.

Manufacturing (continued)

Subcontracting

Delegate all or part of operations to external work centers. Use separate location and transfer order to track raw materials. Register performed work with purchase orders.

Finite loading

Manage finite loading of capacity-constraint resources. Account for capacity constraints for periods to avoid overloading work centers.

Scrap

Scrap can be inevitable in the manufacturing process. But making sure it is properly recorded is essential to proper inventory and cost management.

Globalization and compliance regulations

Support globalization and compliance regulations like International Financial Reporting Standards, local functionality, GDPR, and more. Confidence in a business management solution is key to running an efficient business. With Business Central companies are empowered to streamline business processes while consistently and cost-efficiently complying with increasing regulation and reporting requirements.

Data privacy

Business Central supports data privacy initiatives such as General Data Protection Regulation (GDPR).

Accounting processes and controls to aid compliance

Companies face increasing financial accounting challenges. Depending on industry, markets, geographic location, and financing needs, an organization may be subject to local generally accepted accounting principles (GAAP) and one or more of:

The Sarbanes-Oxley Act (SOX), a U.S. law passed in 2002 to protect investors by improving the accuracy and reliability of corporate disclosures.

The International Financial Reporting Standards section of the European Union's International Accounting Standards (IAS/IFRS), which went into effect in 2005 and sets forth international accounting standards for recognition, measurement, consolidation, and reporting.

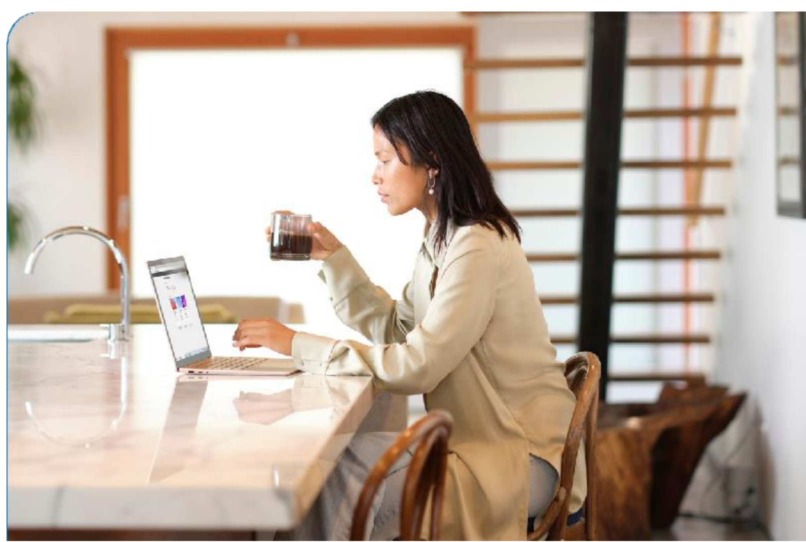
The New Basel Accord (Basel II), enacted in 2006 to address issues of financial institution risk and to promote greater stability in the overall financial system.

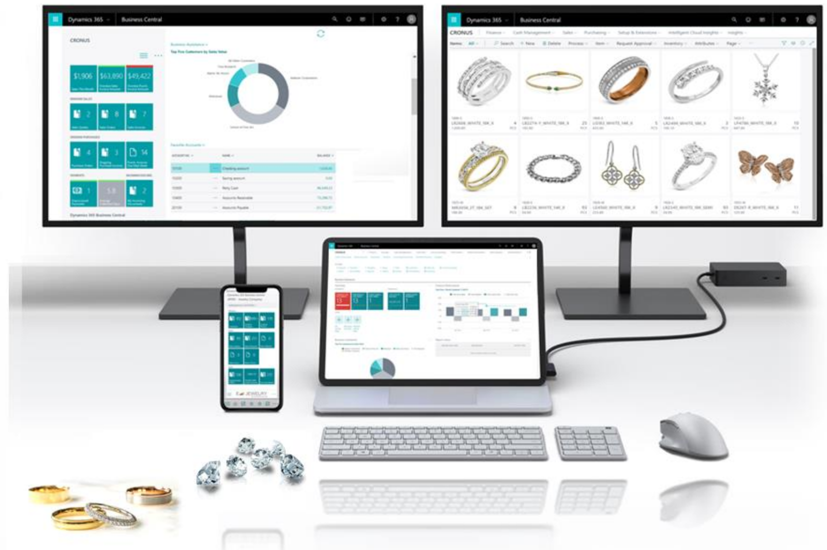
Manage compliance standards

Deliver integrated information, aligned processes, and easy-to-use tools to help your people meet the financial management expectations and standards that matter to your specific business. **Read more** about data privacy and application compliance.

Globalization

Get support for 25 lanugages, localizations, and no-code user interface changes. Purpose-driven extentions from the Microsoft AppSource business applications marketplace will help you meet local requirements.





E JEWELRY©

Powered by Microsoft 365

Features & Functionality

Table of Contents

Product Specifications

Product: Microsoft Dynamics 365 Business Central

Developer: Microsoft Corporation

Type: Enterprise Resource Planning (ERP)

Stable Release: Version 21.00 (2023)

Development Status: Active

Platform: Primarily Cloud Based, On-Premise & Hybrid

License Type: Trialware, SAAS (Essentials, Premium & Team Members).

Programming Language: AL

Architecture: 3 Components: SQL Database, Server, Web Server (w/Business Central App & Web Services).

Languages: 43 Global Localizations

Installations: 300,000 Worldwide

Users: 4 Million Users

Supporting Microsoft Partners: 5,000 Worldwide

Add-on: e-Jewelry Add-On: Certified® for Microsoft Dynamics

e-Jewelry Specialized Features & Reports

Inventory Processing

- Maintain Dual unit of measure piece & weight.
- Bulk import images for items.
- Bar Coding & Scanning
- Multiple Vendors for items
- Customer Discount Schedules
- Bar Coding & Scanning
- Multi-Metal/Stone & Weight
- Tracking inventory transactions
- Real Time Inventory by Item
- Item tracking by Location.
- Physical/Transfer Journals
- Style items with serial tracking
- Maintain Item Variants.
- Stock Tracking functionality
- Track inventory by weight and piece
- Create stock from item card
- Dismantle manufactured stock
- Negative Inventory Control

Metal Functionality

- Maintain daily market price per metal.
- Calculate price of item based on metal in regards with live market price.
- Costing based labor/gr & labor/piece and increment.

Memo Functionality

- Full Memo ordering module.
- Return Processing (Full/Partial).
- Invoicing against memo shipments (Full/Partial)
- Fast bulk processing for Returns and Invoices.
- Full tracking of memo transactions.
- Memo invoicing from multiple memos
- Fast memo return with bar code scanning
- Quote to Order Conversion
- Vendor Memo functionality.
- Rich reporting for whole memo module.

Toll Accounting Functionality

- Meal ledger for toll accounting.
- Separate metal in sales and purchase i.e.: Labor billing only/maintain metal outstanding.
- Stock Low/Out Warnings per Item
- Credit Limit Warnings per Customer

Marketing, Functions & Estimation

- Create Estimations for items.
- Use estimations in Sales Order.
- Create Item Catalogs for customers.
- Quotes with items Images (Multiple formats)
- Generate catalog from Quote

Comprehensive Diamond Functionality

- Maintain Dual unit of measure pieces and weight with inter-conversion.
- Maintain diamond standard attributes.
- Ability to create diamonds/stone card from excel.
- Diamond Lot Split and Merge utility
- Integration with Rapaport pricing.
- Diamond search assistant.

Manufacturing Functionality

- Maintain BOM/Routing/Work Centers and Machine centers.
- Maintain tools and personals for process
- Master Production Scheduling
- Material Requirement Planning
- Make-to-Order and Make –to-Stock options.
- Generate Purchase orders from manufacturing requirement.

Inventory & Costing

- Multiple Costing methods (Standard, Average, LIFO, FIFO, Specific)
- Cost by Markup or BOM line

Purchasing Module

- Automate the entire purchasing process
- Suggest items to purchase report
- Create PO from sales orders lines
- Import Diamond details from excel
- Create purchase orders automatically

Invoicing Features

- Keep detail record of invoices and receivables.
- Multiple Ship to with only one Bill
- Manual Discounts
- Auto Discount by Customer(s)
- Finance Charges Journal (Processing & Tracking)
- Invoice with Items Images

Sales Functionality

- Automate entire sales process.
- Create purchase order from Sales order
- Customer Appraisals
- Ability to handle returns
- Shipment Tracking & Labels (UPS, FedEx, DHL)
- Drop Shipments
- Credit Memo (Processing & Tracking)

Sales Commission

- Comprehensive sales commission engine.
- Commission calculation based on commission rules
- Calculate commission on invoice amount
- Calculate commission paid invoices only
- Split commission for multi-sales people

Mailing Functionality

- Facility to send SO, PO, Statement & Memo documents by email.
- Single click operation on documents.
- Facility to send documents in bulk.
- Ability to maintain unlimited emails with receiving options as to or cc.

Label Printing

- Facility to print label from Shipment, receipt Item card etc. documents.
- Easy and in depth configuration of label.
- Integration with BarTender and EasyLabel.
- RFID Integration
- Flexible Label Formatting

Jewelry Job Production

- Create Job Bag for manufacturing jewelry item.
- Make-to-Order and Make –to-Stock options.
- Repair Jobs with custom item usage.
- Tracking of jobs per resource.
- Facility to create Jobs from Purchase Order.

Security

- Security based on roles and permissions.
- Block cost for non-authorized users

E-commerce Integration

- Ability to handle XML file transfer for importing bulk orders.
- Ability to connect various e-commerce platforms.
- Communicate e-commerce portal thru web services.

Other Features

- Imaging throughout the System
- Multi-Currency/Multi-Lingual Capabilities
- Jet Reports/Jet Enterprise Integration
- POS/CRM/RFID/EDI/E-SHIP
- E-Commerce/Shopify/Devices Integration
- Document Management
- User Added Warnings per Customer

e-Jewelry Specialized Features Detailed Definitions

Inventory Processing

This granule all jewelry industry specific functionality to NAV. The prime requirement to maintain items in its duel unit. The transactions takes place in pieces and weight as well. e-Jewelry facilitates use of duel unit and inter convertibility.

- Barcode and Scanning: Label can be printed from transactional documents like Sale Order, Sales Shipment, Purchase Order, Purchase Receipt, Item Card, and Serial No. Card.
- You can scan your item directly into documents.
- You can enter pieces or weight in transaction documents. The counter unit gets calculated.
- e-Jewelry has integration with Easy Label and Bartender to print labels.
- Item images can be imported in bulk.

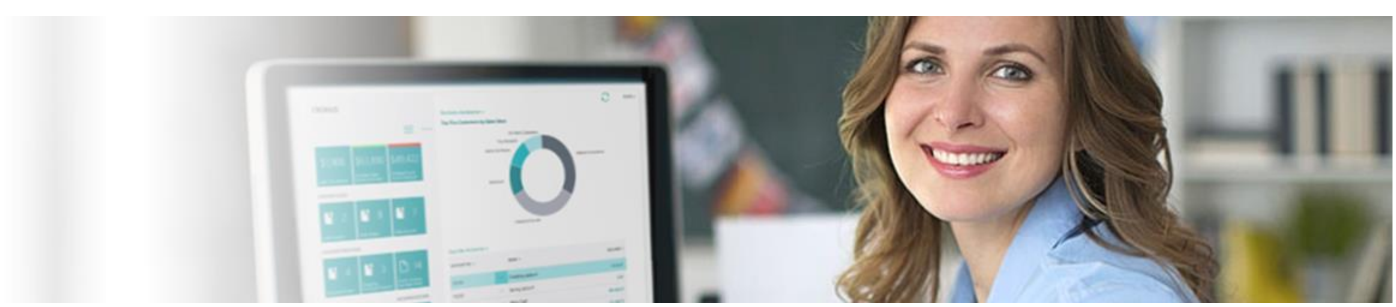
Metal Functionality

- e-Jewelry provides full metal management. This covers various aspects of price management, costing etc.
- Maintains day-to-day prices per metal viz. Gold, Silver, Platinum etc.
- Calculates Cost and Price of items based on metal in regards with live market prices (as updated).
- Ability to sell separate metal in sales. (When item shipped to customer and only labor is charged and metal is expected to be returned back. Toll accounting)
- Ability to maintain metal outstanding only. Which can be paid by customer in the form of metal itself or currency.
- Updates BOM prices of items, which includes item based on metal upon change in metal price.

Memo Functionality

This granule allows you to send merchandize to customer on returnable basis. When material is sent on Memo, its inventory is distinguished from in house inventory. Customer either can sell the item or sent it back. When the material is sent back it' s taken as return and updated the inventory. When customer sells the item on the same order you can invoice the item for the customer.

- Ability to ship items on memo.
- In Fast memo option, user is able to select customer and on scanning item, system creates memo document.
- In Fast invoice option, user is able to select customer and item, system searches the item shipped for the customer and invoices it against the Memo Order.
- In Fast return option, user is able to select customer and scans item. System post the receipt against the shipment.
- Maintains history of memo transactions.
- Reports
    - ✓ Memo statement. Details of memo transactions for customer
    - ✓ On memo by Customer. Detail listing of items on memo.
    - ✓ On memo by Item. Detail listing of items on memo.
    - ✓ Memo Performance. List of memos showing details of items invoiced or received against memo.



Diamond Functionality

This functionality manages all diamond requirements. Maintains required attributes. Takes care of Rapaport integration.

- Maintain dual unit' s carat weight and pieces and their interrelation.
- Maintain diamond items with all its attributes required by jewelry industry.
- Update Rapaport prices to diamonds.
- Ability to create diamonds from Rapaport List.
- Ability to create diamonds based on excel list.
- Facility to search diamonds based on its characteristics.
- Facility to split diamond lot into desired lots.

Manufacturing Jobs

- e-Jewelry has simplified job modules.
- Ability to track job progress per resource.
- Can allocate components and post them as they are consumed.
- Can process repair jobs.
- Integration with sales order.
- Stock jobs can directly be prepared from Item card.
- Can track time required to finish each process and print time details.
- Enhanced industry approved job card formats.

Inventory & Costing

- Maintain dual units weight and pieces and their interrelation.
- Ability to separately post labor cost from sales order in case of metal transaction.
- Allows interface to create items on a go with simple entry card.
- Facility to import and create items from excel and use them directly into purchase order.

Purchasing Module

- Automating purchasing process.
- Ability to import items from excel.
- Suggest item requirement to be procured.
- Requisition management.
- Reorder inventory based on stock level.
- Enhanced reporting.

Invoicing Features

- Convert quote into sales orders.
- Ability to convert Memo into Invoice.
- Facility to create (e-Jewelry) manufacturing job from sales order.
- Facility to create repair jobs from sales order.
- Facility to use Assembly BOM, in sales order with dual unit.
- Provides integration with Estimations
- Ability to related View/Post/Cancel jobs from sales order.
- Facility to print tags from sales order.

Mailing Functionality

- Facility to send documents over email
- Configure list of emails for customer who will receive mail. Can be mentioned as mail to or CC.
- Optionally keep the document sent to customer/vendors.
- Can choose from SMTP direct delivery or Outlook integration.
- Customizable subject and body texts.
- Can Send:
  - ✓ Sales Order Confirmation,
  - ✓ Sale Invoice
  - ✓ Sales Credit Memo.
  - ✓ Customer Statement
  - ✓ Sales Quote
  - ✓ Purchase Order.
  - ✓ Memo Confirmation
  - ✓ Catalog
  - ✓ Estimate.

Label Printing

This facility allows you to print labels (Tag) for your jewelry merchandize.

- Facility to print labels from various documents, Sales order, Purchase Order, Purchase receipt, Item Card, Sr. Number Card.
- Facility to maintain matrix of different label per Item, per customer or group of item, group of Customers.
- No of labels printed based on quantity or quantity to ship.
- Can print desired no of labels from item card.
- For item special Tag price can be maintained which can be printed on label.
- Integration with BarTender and EasyLabel.
- Can use exclusive short descriptions for Tag apart from items descriptions.

Jewelry Production

This facility allows you to create job cards for the sales order, which is displayed in the line. When job is created, you can print job envelop from sales line directly. When job gets executed in steps, its status is updated in sales line.

- Creates job bag for manufacturing jewelry items.
- Can be added required components and resources used while making the finished item.
- Creates job bag for repair of items. Can be added resources used while repairing the item.
- Facility to track jobs per resource and schedules of dates of completions.
- Ability to maintain time required to complete item
- Jobs can be created from sales order as make-to-order and Item card as make-to-stock.
- Facility to allocate and consume.
- Reports:
  - ✓ Job Ticket/Job Envelop (Multiple Formats)
  - ✓ Availability and requirement of components required to manufacture the finished item.

Marketing Functionality

As part of marketing, company needs to send catalogs to customers. Send estimations with various combinations of components for an items and create orders based on the estimates.

1. Estimations
    a. Ability to create estimation for customer with customized components.
    b. This estimates can be used in sales order and bill based estimated price.
    c. Can be added drawing as estimate picture.
    d. Reports
        i. Estimation
        ii. Estimation with Components
2. Catalog
    a. Ability to send catalog of selected items to customer. This includes image of item. The fields to be shown are decided by user.
    b. Bulk items can be selected in catalog.
    c. Can show sales prices from sales price matrix for the customer.
    d. Can create catalog with fixed desired metal price.
    e. Can send catalog as pdf attachment by an email on fly.
    f. Report
    g. Catalog Report.

Sales Functionality

1. Maintain dual unit's weight and pieces and their interrelation.
2. Maintains customer's appraisals for items.
3. Ability to recalculate metal items based on market price.
4. Ability to assign multiple sales person to an order.

Sales Commission

1. Calculate commission (On Invoice amount)
2. Calculate commission (Paid invoices only)
3. Split commission for up to four people
4. Split commission based on different rates
5. Allow to recalculate commission rate on
6. Apply credit to invoices to reduce
7. Commission due amount
8. Mark commission paid invoices

Security

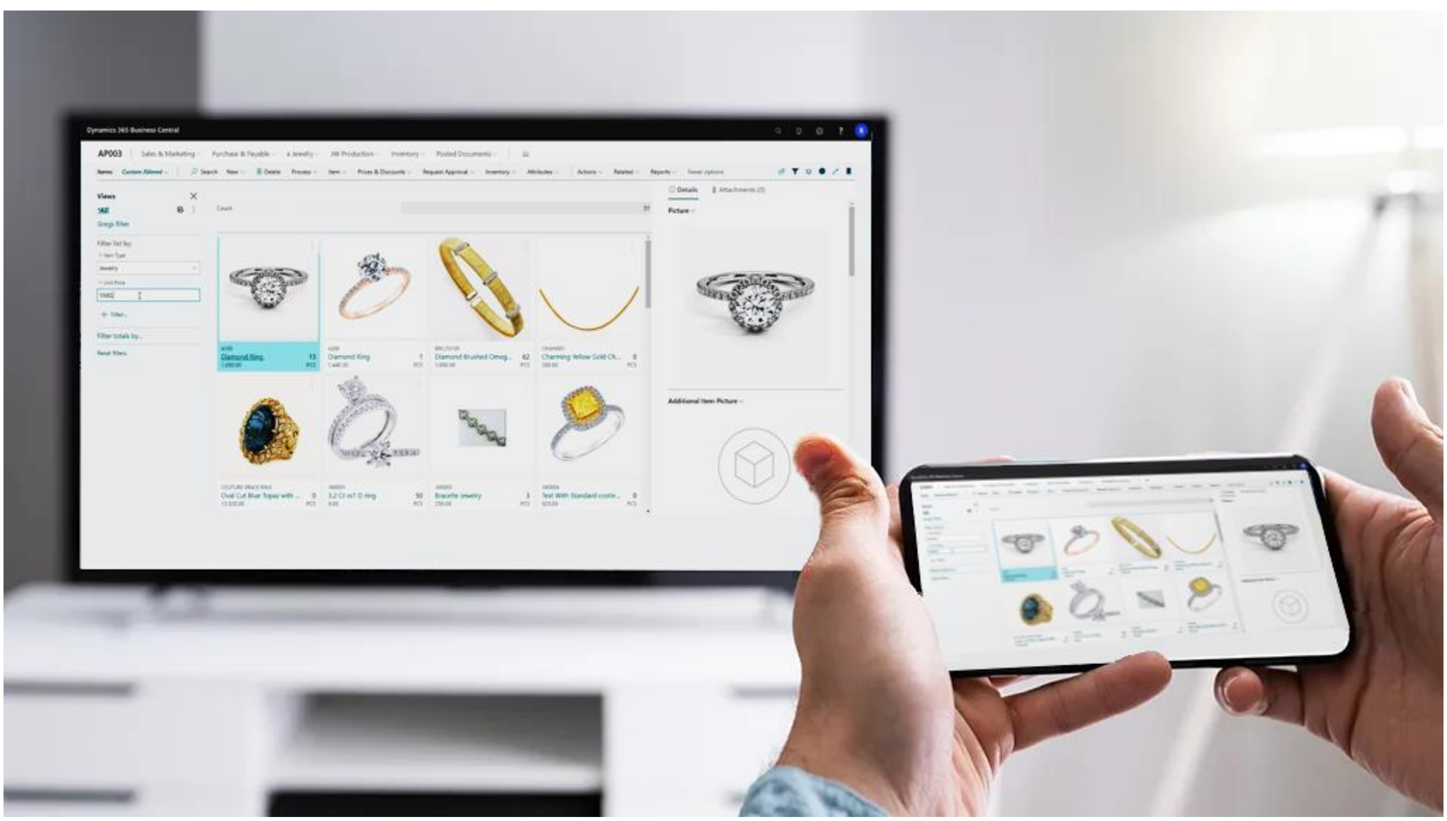
1. Block cost for non-authorized users
2. Potentially restricts user to access the data what he/she is not authorized to.
3. Simplified user's permission setup.

Toll Accounting Functionality

This facility allows you to bill labor only against the item you sell to customer. This facility maintains separate outstanding of amount and metal. There is a special metal receipt provided to receive payment against metal outstanding in kind of currency or metal or even alternate metal.

E-Commerce Integration

1. Xml files transfer: this is based on xml files transfer. Portal and NAV communicates to shared folder where files are stored and read by both ends. The files ones got processed, gets moved to archive folder. Based on processing results success or failed the files are moved to different folders. Email notification sent on each failure to relevant people based on configuration.
2. Web Services: portal data can be published thru web services which NAV can read and process the information in NAV data. NAV is capable of publishing web service which portal can access and read information shared by NAV. The web services are protected with high security methods.
3. SQL database: in this method an intermediate SQL database is used for storage of shared data. Both portal and NAV access the database to update / read data. Job queue are used to process data from and update data to common database.
    a. The data can be synchronized is:
    b. Orders and Customers:
    c. Shipments
    d. Inventory update and new Items
    e. Returns
    f. Payment
    g. Update Sales prices.
    h. Any other data as per requirement



e-Jewelry Specialized Reports Summary

Financial Management

- Daily Invoicing Report Detail
- Cash Receipts By Date
- Profit Report by Customer
- Profit Report by Item
- Day Book
- Detail Trial Balance
- Receivables-Payables
- Trial Balance/Previous Year
- Trial Balance/Budget
- Analysis Reports - Finance
- Account Schedule
- Fiscal Year Balance
- Balance Comparison - Previous Year
- Bank Account Register

Memo Features

- On Memo By Customer
- On Memo by Item
- Outstanding Memo Order
- Customer Memo Statement
- Memo Not Shipped Status
- Memo Performance

Estimation, Quotes & Catalog

- Catalog with Expected price
- Item Catalog New
- Item Catalog (Format 1)
- Item Catalog (Format 2)
- Quote Item Catalog
- Customer Estimation
- Estimation Parts Breakdown
- Estimation Vendor Compare

Sales Module

- Customer - Detail Trial Balance
- Customer - Order Summary
- Customer - Order Detail
- Customer - Summary Aging Simple
- Customer Statement
- Customer - Balance to Date
- Customer - Trial Balance
- Inventory - Sales Back Orders
- Aged Accounts Receivable
- Customer Sales Statistics
- Customer/Item Statistics
- Customer/Item Stat. by Salesperson.
- Daily Invoicing Report
- Outstanding Sales Order Aging
- Outstanding Sales Order Status
- Customer Statement
- Top Selling Items
- Top Items with Pictures.
- Customer Sales by Item Types
- Item Sales Profile
- JW Customer Statement
- Customer - Order Summary
- Customer - Top 10 List
- Monthly Sales Summary Customer
- Monthly Sales Summary Item wise
- Commission Report
- Coop Report
- Sales Order Not Invoiced
- JW Sales Net Available

Reports with Picture

- Item Catalog New
- Item Catalog (Format 1)
- Item Catalog (Format 2)
- Quote Item Catalog
- Customer Estimation
- Estimation Parts Breakdown
- Top Items with Pictures.
- Item Sales Profile
- Item List with BOM
- Job Traveler
- Job Ticket
- Job Detail

Analysis Reports - Inventory

- Top Selling Items
- Top Items with Pictures.
- Item Transaction Detail
- Non Moving Items
- Item – Dashboard

Inventory Processing

- Status
- Inventory - Availability Plan
- Item Transaction Detail
- Serial Number Sold History
- Serial Number Status/Aging
- Metal Ledger Entries
- Metal Receivable
- Metal Receipt by Customer
- Metal Receipt by Date
- JW Purchase Advice
- Diamond Available List
- Non Moving Items
- Item List with BOM
- Style Stock Status
- Items by Location
- Item - Dashboard
- Metal Statement Customer
- Metal Statement Vendor

Manufacturing & Jobs

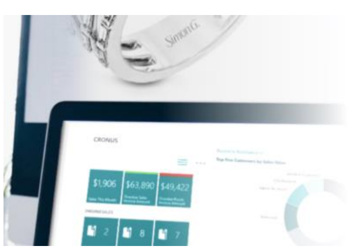
- Job Traveler
- Job Schedule Report
- Job Ticket
- Job Tracking (Station wise)
- Job Comp. Req. & Availability
- Job Detail
- Job Estimated Time to Complete

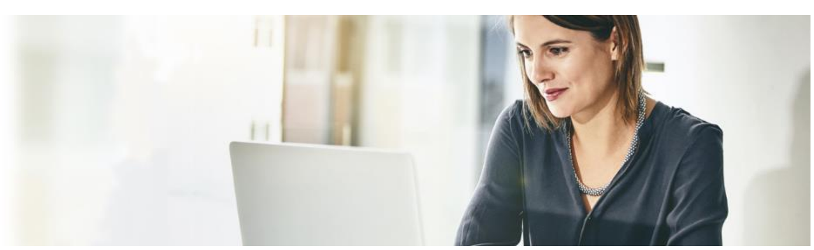
Purchasing Module

- Vendor - Detail Trial Balance
- Vendor - Trial Balance
- Aged Accounts Payable
- Monthly Purchas Summary vendor
- Purchase Order Not Invoiced

Documents with Picture

- Memo Order with Pictures
- Memo Shipment with Pictures
- JW Sales Quote with Pictures
- JW Sales Order with Pictures
- JW Sales Invoice with Pictures
- JW Sales Shipment with Pictures
- JW Purchase Order with Pictures
- Job Envelope
- Job Envelope (Format 1)
- Job Envelope (Format 2)





Financial Management

Daily Invoicing Report Detail

Shows the total invoice or credit memo activity, or both. This report can be run for a particular day or range of dates, showing one line for each invoice or credit memo. You can view the bill-to customer number, name, payment terms, salesperson code, amount, sales tax, amount including tax, and total of all invoices or credit memos. The report can also show both invoice and credit memo activity on separate pages.

Cash Receipts by Date

Lists cash daily receipts

Profit Report by Customer

Shows customer-wise profit margin on items sold to customer.

Profit Report by Item

Shows item-wise profit margin on items sold.

Day Book

List of all financial transaction for given period.

Detail Trial Balance

Shows a detail trial balance for selected general ledger accounts. You can use the report at the close of an accounting period or fiscal year.

Receivables-Payables

Shows a summary of receivables for customers and payables for vendors.

Trial Balance/Previous Year

Shows a trial balance in comparison to the previous year's figures or see a trial balance for selected dimensions or use at the close of fiscal year.

Trial Balance/Budget

Shows a trial balance in comparison to a budget.

Account Schedule

Shows an account schedule that can be used to display the general ledger accounts in a different way than in the chart of accounts. For example, account schedules can be used for reports on key figures.

Fiscal Year Balance

The report shows balance sheet movements for selected periods and the closing balance by the end of the previous fiscal year for the selected ledger accounts. It also shows the fiscal year until this date, the fiscal year by the end of the selected period, and the balance by the end of the selected period, excluding the closing entries. The report can be used at the close of an accounting period or fiscal year

Balance Comparison – Prev. Year

Shows an overview of the general ledger accounts with information about the current period, the balance at the end of the period, the balance in the same period of the previous year, and the balance of the previous year

Bank Account Register

Shows posted bank account entries sorted and divided among each register.

Memo Features

On Memo by Customer
Customer-wise list of inventory on memo.

On Memo by Item
Item-wise list of inventory on memo.

Outstanding Memo Order
This gives customer-wise list of memos which are not shipped. This shows amount of remaining quantity to ship.

Customer Memo Statement
This another format for memo statement. This prints list of memo for the customer with due date and balance with the customer.

Memo Not Shipped Status
This lists all the memo orders which are not shipped.

Memo Performance
This gives list of memo shipped versus quantities invoiced against shipment. This shows performance of invoicing against shipment.

Bank Account Register
Shows posted bank account entries sorted and divided among each register.

Estimation, Quotes & Catalog

Catalog with Expected price

Prints catalog based on expected metal price. Enter metal price at runtime of the report. This report calculates selling price of each item.

Item Catalog New

Prints item catalog in matrix format with three columns, three rows on each page & showing item image & the fields selected on catalog header.

Item Catalog (Format 1)

This prints item catalog in 4 x 2 matrix format. This includes image available inventory of item. This also prints barcode for the item.

Item Catalog (Format 2)
This is item list catalog format. This shows image, description, UPC code and tag price.

Quote Item Catalog
.This is a 4 x 3 matrix sales quote document that can be used to print to catalog. This quote item catalog prints catalog from quote

Customer Estimation
Estimates a particular item with customized components, showing cost & price of each component item including customer confirmation slip.

Estimation Parts Breakdown
This estimate prints details of components, metal, diamonds and resources separately and gives the total cost and price.

Estimation Vendor Compare

This gives comparison details of estimated items when it is bought from different vendors.

Sales Module

Customer - Detail Trial Balance

Shows a detail trial balance with entries for selected customers for a selected period. The report can be used at the close of an accounting period, for example, or for an audit.

Customer - Order Summary

Shows the order detail (the quantity not yet shipped) for each customer in three periods of 30 days each, starting from a selected date. There are also columns with orders to be shipped before and after the three periods and a column with the total order detail for each customer. The report can be used to analyze a company's expected sales volume.

Customer - Order Detail

Shows a list of orders divided by customer. The order amounts are totaled for each customer and for the entire list. The report can be used, for example, to obtain an overview of sales over the short term or to analyze possible shipment problems.

Customer - Summary Aging Simple

Shows a list of the customers' balances due in LCY divided into five time periods: not overdue; 0-30 days overdue; 31-60 days overdue; 61-90 days overdue; and more than 90 days overdue. The report can be used to manage the issuance of reminders or to prepare liquidity analyses.

Statement

Replaced by 14052432: JW Customer Statement

Customer - Balance to Date

Shows a detail balance for selected customers.

Customer - Trial Balance

Shows a detail balance for selected customers. You can use the report to verify that the balance for a customer posting group is equal to the balance on the corresponding G/L account on a certain date

Inventory - Sales Back Orders

Shows a list with the order lines whose shipment date has been exceeded and by no of days been delayed

Aged Accounts Receivable

Gives detailed/summarized aging of customer outstanding

Customer Sales Statistics

Shows amounts for sales, profit, invoice discount, and payment discount in LCY, as well as profit percentage, for each customer. The costs and profits are given as both the original and adjusted. The original costs and profits are those that were calculated at the time of posting, and the adjusted costs and profits reflect changes to the original costs of the items in the sales. The cost adjustment amount shown in the report is the difference between the original cost and the adjusted cost. The figures are divided into three periods. You can select the length of the period, starting on a selected date. There are also columns for amounts before and after the three periods. The report can be used, for example, to analyze earnings from an individual customer and earnings trends.

Customer/Item Statistics

Shows the statistics about what items have been purchased by which customers.

Customer/Item Stats by Sales Person

Shows customer and item statistics listed by salesperson.

Daily Invoicing Report

Shows the total invoice or credit memo activity, or both. This report can be run for a particular day, or range of dates. The report shows one line for each invoice or credit memo. You can view the bill-to customer number, name, payment terms, salesperson code, amount, sales tax, amount including tax, and total of all invoices or credit memos. If you want both invoice and credit memo activity it will show invoice and credit memo activity on separate pages.

Outstanding Sales Order Aging

Shows customer orders aged by their target shipping date. Only orders that have not been shipped appear on the report.

Outstanding Sales Order Status

Shows detailed outstanding order information for each customer. This report includes shipping information, quantities ordered, and the amount that is back ordered

Customer Statement

Shows a list of customer statements. Use this report to print statements on generic forms or plain paper. You must enter a date filter to establish a statement date for open item statements or a statement period for balance forward statements.

Customer Sales by Item Types

This report shows customer wise sales per item type. This includes sales shipments and sales return with sales amount and piece price.

Item Sales Profile

This is sales profile is catalog of items. This is 5 x 4 matrix report. This prints item no, item image and item description.

JW Customer Statement

This customer statement prints all open entries for the customer. This shows total outstanding for the customer. This includes confirmation slip, which customer can mark which invoices being paid along with his payment.

Customer - Order Summary

This order summary prints customer-wise order amounts comparing monthly. This report prints data for three months. It shows sales order amounts booked for those three months with before and after the given period.

Customer - Top 10 List

This is top performing customer list with graphical representation of sales amounts. The number of customer to be included in report can be decided at the runtime of the report. This report comes with to graph options, Bar chart and Pie chart.

Monthly Sales Summary Customer

This report shows monthly sales amounts per customer for the selected year. This report exports to excel only.

Monthly Sales Summary Item wise

This report shows monthly sales amounts per Item for the selected year. This report exports to excel only.

Commission Report

This report gives commission amounts based on commission percent set on item card for all the invoiced sales.

Coop Report

This report gives Coop amounts based on Co-op percent set on customer card for all the invoiced sales.

Sales Order Not Invoiced

This report gives details of all the orders which shipped but pending for invoicing. This is customer-wise report.

JW Sales Net Available

This lists items with its image, wholesale price, tag price, total quantity on hand, quantity of memo order and quantity on sales order. This shows net quantity available for sale.

Analysis Reports – Inventory

Top Selling Items

This report prints top selling items, highest first. This is matrix format report it prints items in 4 x 3 matrix. This shows item no., description, unit price, total quantity sold and quantity on hand.

Top Items with Pictures

This report prints top selling items, highest first. This is list format report. This shows item no., description, unit price, total quantity sold, quantity on hand, quantity on memo, quantity on job.

Item Transaction Detail

Shows detailed purchase, sales, and adjustment information about the items in your inventory. This report lists transactions by the item that they pertain to. If an item has variants, each variant's transactions are listed separately.

Non-Moving Items

This reports shows list of items with dead inventory for last given period. This report can be printed in two option, one with nonmoving items and two non-selling items for last given period.

Item - Dashboard

This is graphical representation of Item transaction information. This gives information about inventory available. Sales for the period.

Inventory Processing

Status

Displays the current inventory status of the selected items. This includes the quantity in inventory, the unit cost and the inventory value.

Inventory - Availability Plan

You use the report to display a list of the quantity of each item in customer, purchase, and transfer orders and the quantity available in inventory. The list is divided into columns that cover six periods with starting and ending dates as well as the periods before and after those periods. The report is useful when you are planning your inventory purchases.

Serial Number Sold History

Tracks serial-numbered items to the customers that bought them. The system includes the date of the sale as well as the amount the item was sold for on the report. The report shows the item first followed by the customer that purchased that item

Serial Number Status/Aging

This report to lists serial-numbered items that are currently in stock. This report includes serial-numbered items along with the purchase date and the number of days the item has been in stock.

Metal Ledger Entries

When entries are posted with separate metal option or metal receipts. This reports shows entries pertaining to pure metal.

Metal Receivable

Customer-wise metal outstanding.

Metal Receipt by Customer

Customer-wise list of metal receipts

Metal Receipt by Date

Date-wise list of metal receipts

JW Purchase Advice

Generates detailed availability and demand. Suggests quantity to purchase

Diamond Available List

Displays list of diamonds with available inventory on hand.

Item List with BOM

This list prints list of items with its BOM components.

Style Stock Status

Displays the current inventory status of the selected Style items. This includes the quantity in inventory, the unit cost and the inventory value.

Items by Location

This report shows inventory available in each location.

Metal Statement Customer

This is statement account for metal transactions. This includes outstanding of metal for customer. This is also prints confirmation slip which customer can use to mention payment.

Metal Statement Vendor

This is statement account for metal transactions for Vendor. This includes outstanding of metal for Vendor. This is also prints confirmation slip which vendor can use to mention payment.

Manufacturing & Jobs

Job Traveler

This is detailed job report, which it shows quantities of components and pieces and weight allocated. This includes resource used for particular selected job.

Job Schedule Report

This reports shows all the open jobs with aging of delayed completion date. This prints total pieces for the job was created and weight still to process and status of each job.

Job Ticket

This is single section job card format

Job Tracking (Station wise)

This gives details jobs which are running with each resources. This report prints starting and ending dates, durations for each job at each resource. This includes notes of the job.

Job Component Req. & Availability

This reports shows inventory availability of each component. This shows available quantity of each component item and suggest with current available quantity how many job pieces can be completed.

Job Detail

This detailed report for a job. This shows total pieces per and weight per. Total required pieces and weight. And costs for each with total cost for the job.

Job Estimated Time to Complete

This is shows for each resource process what is standard time to finish per quantity, and the total remaining time for remaining quantity to produce.

Purchasing Module

Vendor - Detail Trial Balance

Shows a detail trial balance with entries for selected vendors during a selected period.

Vendor - Trial Balance

Shows a detail balance for selected vendors. You can use the report to verify that the balance for a vendor-posting group is equal to the balance on the corresponding G/L account on a certain date.

Aged Accounts Payable

Shows the aged remaining balances for each vendor. Vendor transactions will be listed by transaction or due date.

Monthly Purchas Summary vendor

This report gives matrix of vendor-wise purchase in amount, per month for the given year. It exports to Excel only.

Purchase Order Not Invoiced

This report gives list of all the purchase orders against which, receipt had been posted but not invoiced.

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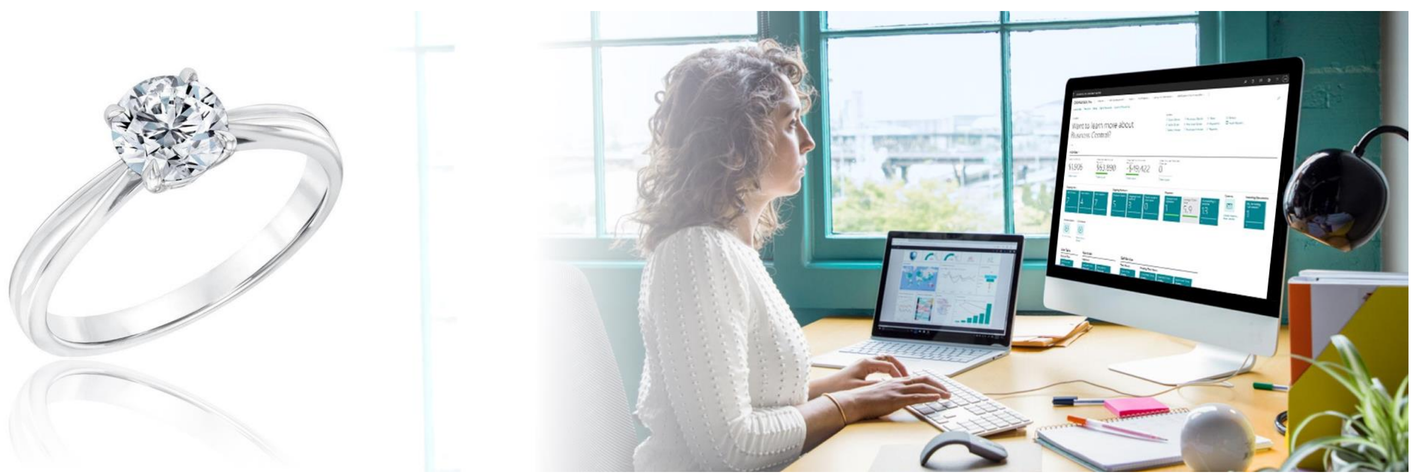

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