# *Your role as*

# ERP MANAGER

## for Business Central in the age of cloud and apps

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You are an ERP manager in a company that uses Business Central, and now that the ERP system has become a cloud solution, you have new responsibilities and tasks as an ERP manager.

The role of an ERP manager is about keeping Business Central running well, making sure workflows don't come to a halt, making sure manual tasks necessary for operations are completed on time - and making sure that new workflows are supported by the system by adopting more functionality.

But Cloud has changed how the solution runs (compared to traditional on-premise) - and it also changes your role.

You no longer have an ERP solution that remains the same since the moment you started using it. It's constantly evolving, giving you new responsibilities and you'll definitely need other types of services from your ERP vendor.

That's the topic of this book: Everything you need to know as an ERP manager when you have a Business Central in the Cloud edition.

You need to ensure smooth operations, manage updates, choose the right apps and optimize system performance. We'll talk strategy and best practices, and we'll introduce you to the tools you need.

The world is constantly changing today. And our goal with this book is to help you keep your Business Central efficient and ready for change.

## Anders Faurholt
Senior Business Consultant

" I am a business consultant at Abakion, where I advise companies on the use of ERP across their business processes. I am also Product Manager on several of Abakion's Apps for Business Central.

I started my career in the finance department of a manufacturing company as Controller and later as Business Developer responsible for the operation and development of the ERP solution.

That experience benefits me today because I know how to use ERP in real life and I know the challenges in everyday life when the ERP system is not running well, but also the opportunities it can provide if you use the ERP system optimally.

I hope you can use my advice in your role as an ERP manager.

# CLOUD

Let’s start with the fundamental difference between Cloud solutions and the “old days” of on-premise solutions. Today, your Business Central is a Cloud solution, i.e. Software-as-a-Service (SaaS) running in Microsoft data centers. It used to be a software solution that you installed on your own server, which IT people call ‘on-premise’.

Maybe you’ve been used to having your ERP solution hosted by a hosting partner, so the move to the Cloud doesn’t feel like a big step, but it is, and that’s because a Business Central with a hosting partner is still an on-premise license.

We need to explain this in detail.

An on-premise license is your own license that is installed on a server and only you as the license owner have access to it. If that server is located at a hosting partner, it is still an on-premise license, even if the hosting partner takes care of the operation. An on-premise edition of Business Central must be maintained and updated by you.

The cloud version of Business Central is completely different. Software-as-a-service (SaaS) means that you technically share the solution with many other customers. Of course, you have your own data and you can choose which apps you want to install in your Business Central - but basically you have subscribed to a service that is shared with other customers.

That’s why the Cloud edition is subscription-based and that includes Microsoft taking care of operations, security and upgrades, and that’s quite a large part of your role as an ERP manager that Microsoft takes on as part of their service.

# UPDATING AND TESTING

## One of the most important things with a Cloud solution is that the manufacturer continuously updates the solution.

In the past, you had to initiate updates to the ERP solution yourself. Upgrading was also quite extensive. As a result, ERP solutions often remained unchanged for a long time, and if you waited 7 years to upgrade, you would miss out on all the innovation and new features during those 7 years.

With Business Central as a Cloud solution, Microsoft automatically provides you with 2 major releases every year and monthly minor updates and hotfixes.

The two major releases are where Microsoft introduces new functionality, while all the minor updates are mostly bug fixes and improvements.

New features announced in a major release are not always available immediately. They are released in the monthly updates or they are released as optional features under Feature Management, which we will come back to.

### But this means that your solution changes regularly. And that creates new tasks for you as the ERP manager.

It's not good if users are surprised that the solution suddenly has new features. You need to be on top of the changes, know about them in advance, test them in advance and inform your users in advance.

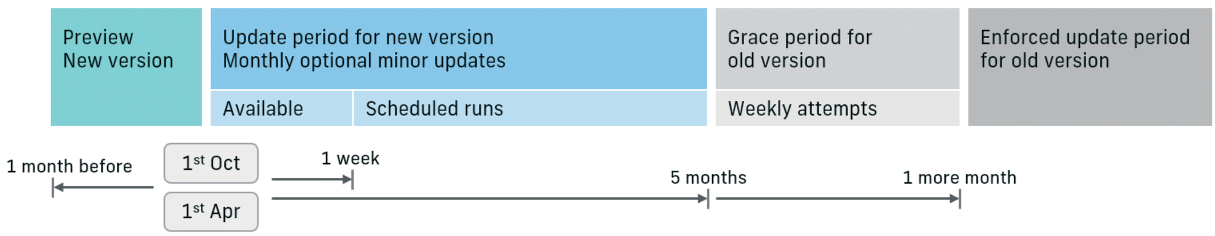
## Scheduling updates

As an ERP manager, you need to have a strategy for how quickly you want to update your solution. Do you want to be the first-mover or do you want to wait as long as possible?

You can postpone Microsoft updates if you are not ready. You may need to test further or you don't want the update to coincide with a busy period internally. But you can only delay updates for a few months at most - and then Microsoft will force you onto the new version.

### You can't continue in the old paradigm and postpone all updates for 7 years and then take a giant leap.

In the cloud world, you have to surrender to continuous updates and take on the task of testing. On the other hand, you avoid the big upgrade projects that previously took up your time and emptied your wallet..

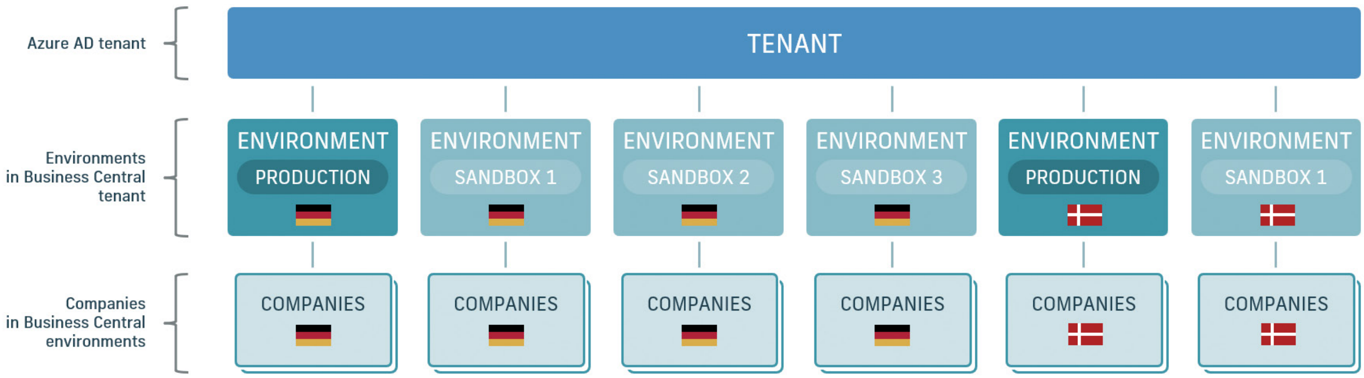



## Test before updating

Are there critical processes that you should test before an update to ensure that operations are not interrupted? You should have a test plan. Microsoft gives you the opportunity to test before the new version is deployed in your production environment.

Some companies run tests in a test company in the production environment because it's the easiest. The problem is that if an app causes problems, it doesn't only affect your test company. An app changes the entire environment, so a problem will also affect your production company.

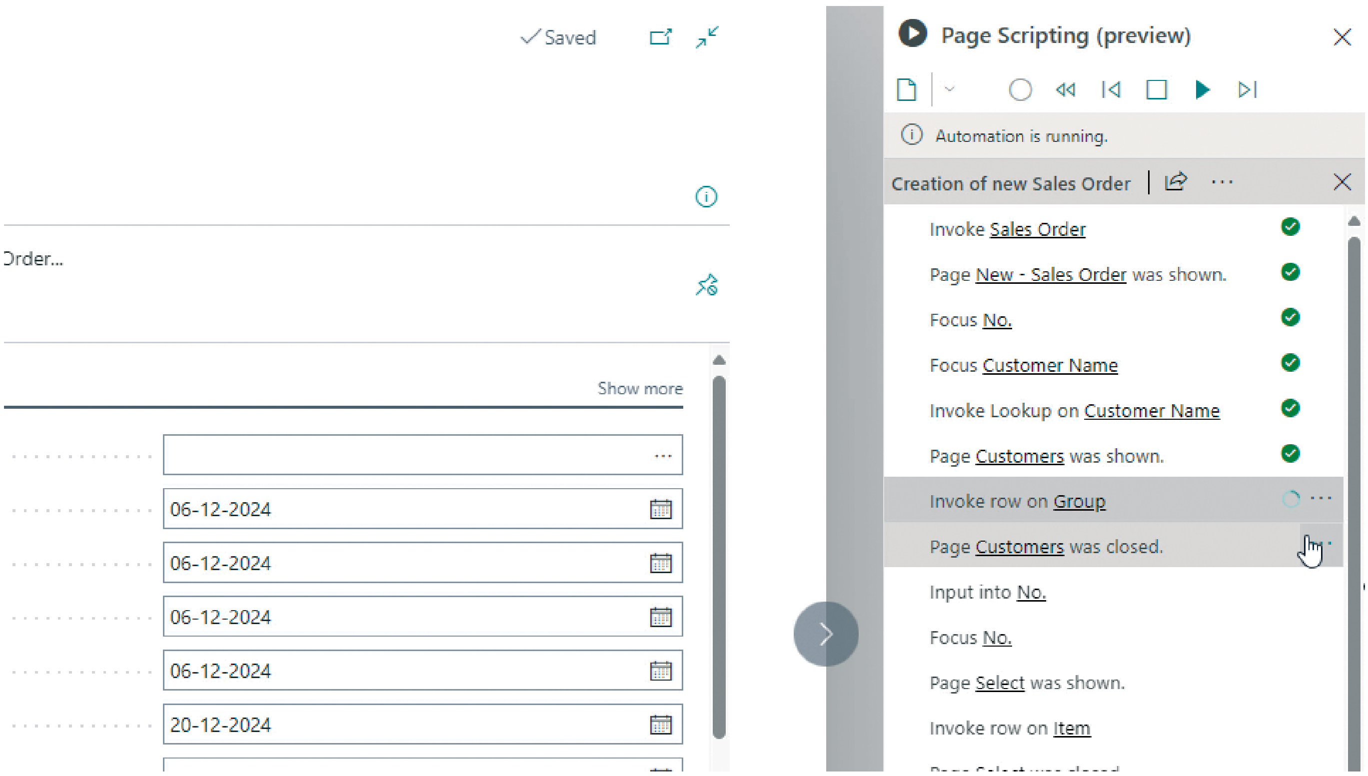
It's much better to copy your production environment into a sandbox. Sandbox environments are always included in your subscription and allow you to test apps and updates without any risk of disrupting operations. You have 3 sandbox environments available for each production environment you have.




## Automated testing with Page Scripting

Page Scripting is an exciting feature that came in Preview in 2024. It's relevant if you need to test workflows before a new update.

You can make a copy of the production environment and record your critical processes, such as creating a sales order, adding item lines, adding a lot no., creating a pick instruction. And then you can replay the process afterwards.



When a new update is released, you can replay all the recorded workflows in a test environment so you don't have to test everything manually.

At the same time, testing will also be consistent because the machine will play the processes in the same way every time. And all you have to do is keep an eye on whether they work or fail.

It's a bit like Power Automate Desktop, where you can also record workflows. This is just an integrated part of Business Central.

## Semi-automation

But consider for a moment whether this feature can also be used to perform repetitive tasks in everyday life. Have you tried working with macros in Office applications? With a macro, you can record a series of functions in Word, for example, and assign it to a shortcut key, and when you press CTRL-8, Word performs 17 functions that would have taken you a long time to do manually.

Similarly, you can utilize Page Scripting in Business Central as a robot that can perform functions that you have recorded - semi-automating repetitive tasks.

As an ERP administrator, you now have more opportunities for streamlining and automation - both through the Power Platform and Page Scripting in Business Central - and you should actively explore how you can help your users with trivial tasks with these tools.

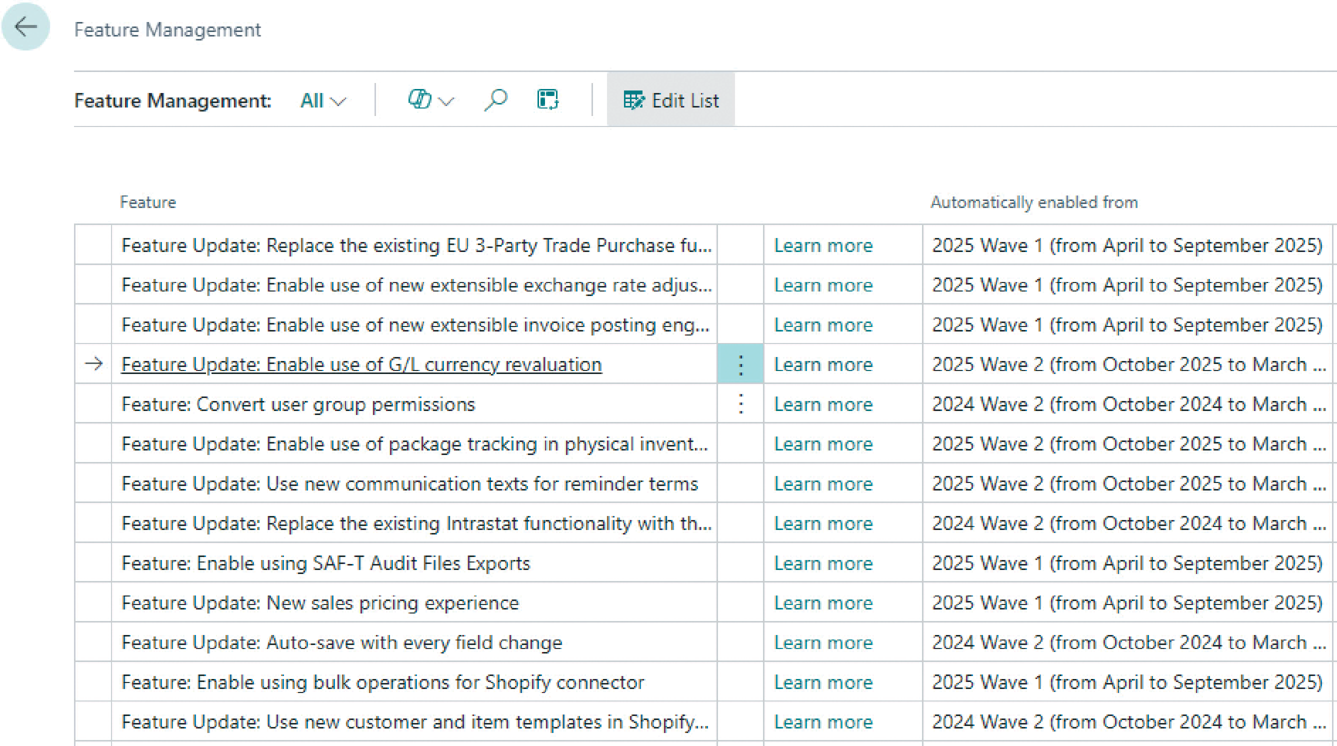
## New features in Preview

Most new features in Business Central are released directly in connection with an update. However, Microsoft sometimes uses a softer rollout strategy by making the new feature available as an optional update for a period of time under Feature Management.

These 'soft' releases are often features that require a little more thorough testing or configuration. For example, the new sales price structure, which has long been optional to activate, and the phasing out of user groups in favor of security groups for rights management.

When Microsoft puts a new feature in preview, you can choose to turn it on with a feature switch if you want to try it out. At a later stage, the feature becomes a mandatory part of the standard solution.

This way you can test major changes, and you should make sure you do this in a sandbox. Some of these feature switches can't be turned off once you've turned it on. This is the case when the feature changes the entire data model so that transactions are created in a new way.



Feature Management

Feature Management: All | Edit List

| | Feature | | | Automatically enabled from |
|---|---|---|---|---|
| | Feature Update: Replace the existing EU 3-Party Trade Purchase fu... | | Learn more | 2025 Wave 1 (from April to September 2025) |
| | Feature Update: Enable use of new extensible exchange rate adjus... | | Learn more | 2025 Wave 1 (from April to September 2025) |
| | Feature Update: Enable use of new extensible invoice posting eng... | | Learn more | 2025 Wave 1 (from April to September 2025) |
| → | Feature Update: Enable use of G/L currency revaluation | ⋮ | Learn more | 2025 Wave 2 (from October 2025 to March ... |
| | Feature: Convert user group permissions | ⋮ | Learn more | 2024 Wave 2 (from October 2024 to March ... |
| | Feature Update: Enable use of package tracking in physical invent... | | Learn more | 2025 Wave 2 (from October 2025 to March ... |
| | Feature Update: Use new communication texts for reminder terms | | Learn more | 2025 Wave 2 (from October 2025 to March ... |
| | Feature Update: Replace the existing Intrastat functionality with th... | | Learn more | 2024 Wave 2 (from October 2024 to March ... |
| | Feature: Enable using SAF-T Audit Files Exports | | Learn more | 2025 Wave 1 (from April to September 2025) |
| | Feature Update: New sales pricing experience | | Learn more | 2025 Wave 1 (from April to September 2025) |
| | Feature Update: Auto-save with every field change | | Learn more | 2024 Wave 2 (from October 2024 to March ... |
| | Feature: Enable using bulk operations for Shopify connector | | Learn more | 2025 Wave 1 (from April to September 2025) |
| | Feature Update: Use new customer and item templates in Shopify... | | Learn more | 2024 Wave 2 (from October 2024 to March ... |

Then you can't just go back to the old way. So, you need to be certain, before you turn it on in the production environment.

As an ERP manager, how do you become aware of new features in preview?

Of course, you can keep an eye on what's happening inside your Business Central, but you can also follow Microsoft's documentation of updates. If you're lucky, you have a supplier that presents Microsoft's extensive material in a more digestible format.

In Business Central, there is a page called "Feature Management" where you can make all the choices about which features you want to turn on and off. There you can see when new features are expected to become part of the standard solution. As an ERP administrator, it's a good idea to check this page from time to time so you don't get any surprises.

# FUNCTIONAL EXTENSIONS

In an on-premise ERP solution, functionality is traditionally modified by editing the source code, which makes it difficult to update the solution at a later date.

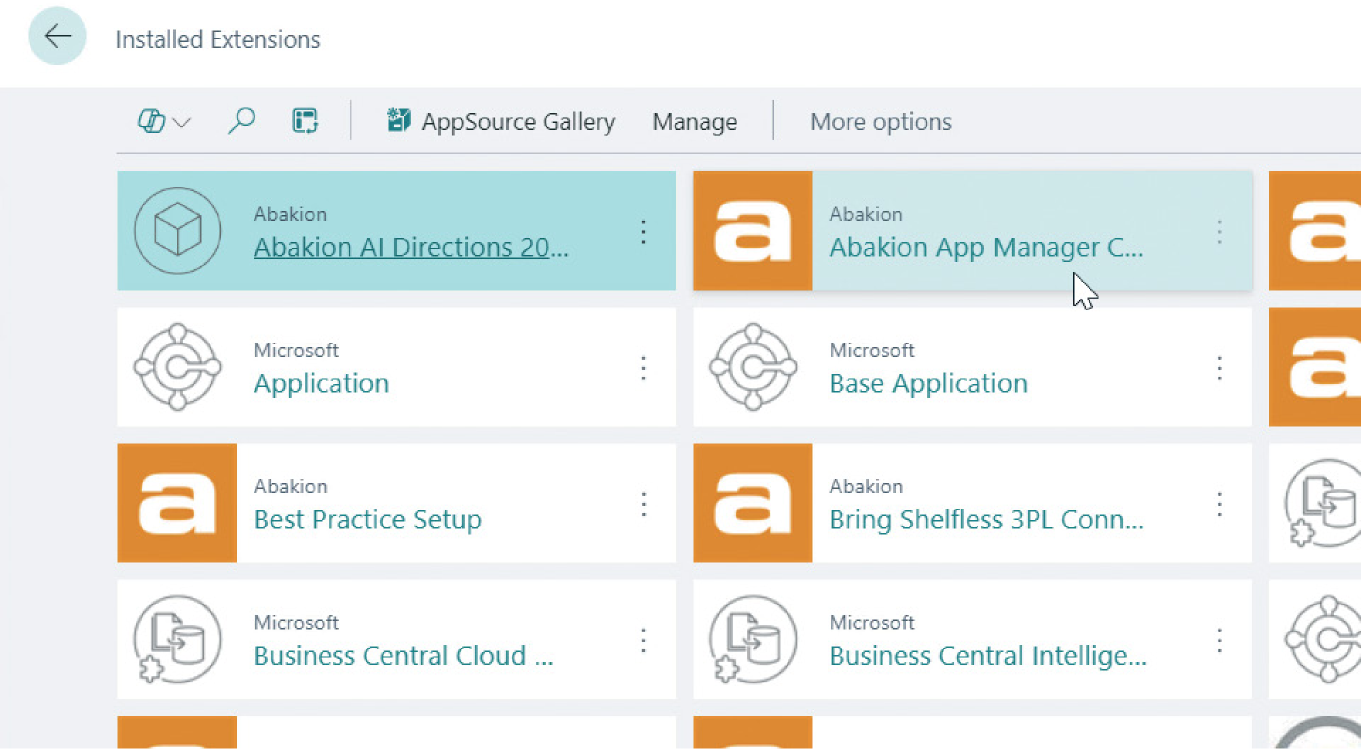
In the Cloud version of Business Central, changes are made via "extensions" that do not change the source code, making the solution easier to update.

You can have an extension developed specifically for your solution or you can choose to install an app from Microsoft AppSource. Apps are developed by Microsoft partners and are approved by Microsoft and meet their documentation requirements, and while they make it easy to extend functionality, you also need to handle them in a certain way.

Apps make it possible to add new functionality without changing the core of Business Central. This simplifies updating and reduces the risk of conflicts with future updates from Microsoft.

It is also possible to have development done specifically for your needs. IT suppliers call this a PTE (Per Tenant Extension). A PTE is an extension that adds features unique to your needs without affecting other Business Central customers.

Just like in the old days with an on-premise solution, you are responsible for maintaining your in-house developed extensions - and making sure they do not conflict with future versions of Business Central. You own the "technical debt" yourself. It's a task you are familiar with if you've been an ERP manager before. But now let's talk about how you should manage apps.



## Choose the right apps

When Microsoft publishes a partner app on AppSource, Microsoft has verified that the app works with Business Central. But that's about it.

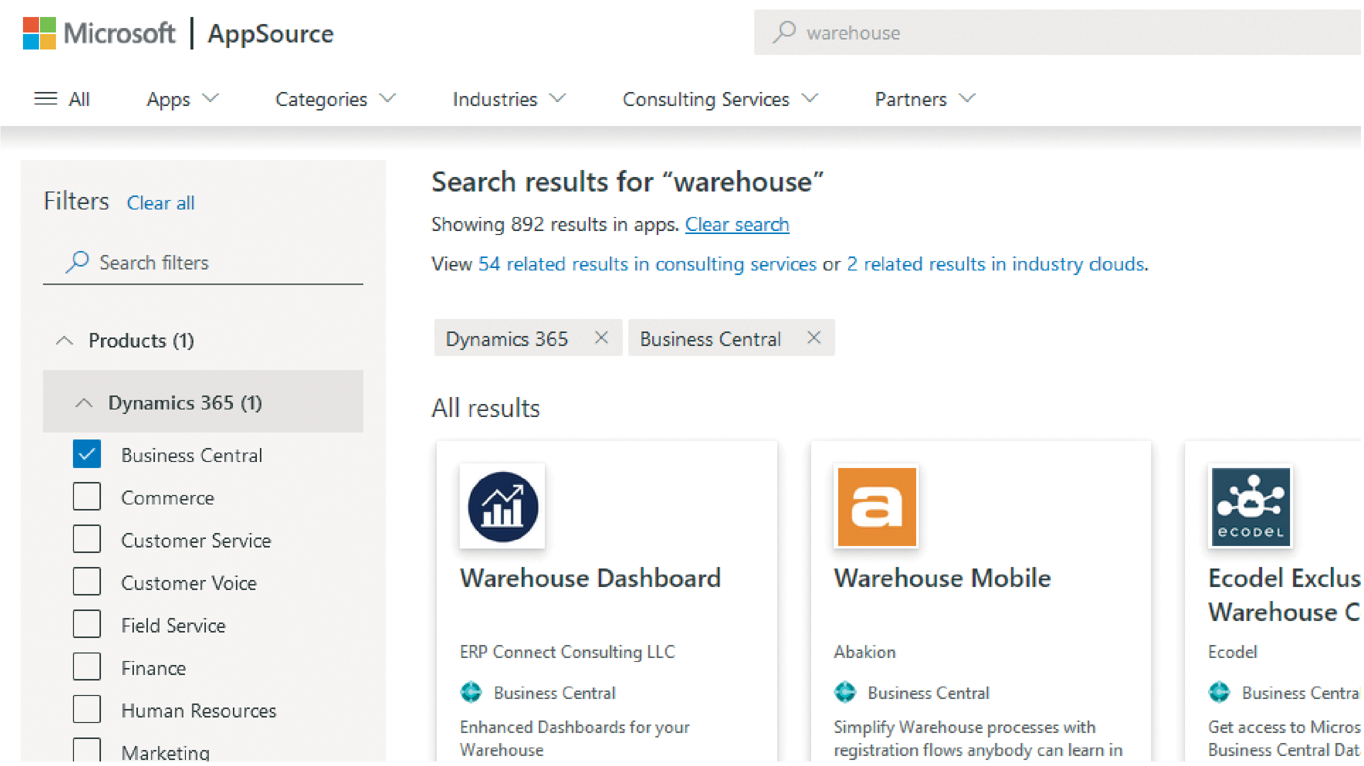
Microsoft takes no responsibility that the app is cleverly developed or that it is a good idea to use it. They only guarantee that the app can be run without causing issues in Business Central.

As an ERP manager, you have to take responsibility for choosing the right apps. Of course, you can rely on the star ratings and evaluations on AppSource, but it's a good idea to ask your ERP vendor which apps they have good experiences with.

They can usually advise you on the most well-known and frequently used apps for a specific need, such as expense management solutions or integration to a shipping agent.

The more specific you can define your requirements and wishes, the better advice you can get to compare possible apps on functionality, acquisition cost and operation.

Sometimes companies find that their ERP vendor would rather develop than recommend apps, perhaps because their business is still focused on development and consulting hours. We often find that companies in this situation do their own research on AppSource, which is a good idea.



It's not at all certain that your ERP vendor knows what apps are available. It's also hard to keep up because there are thousands of apps available on AppSource, so you can't expect your vendor to know the complete selection of apps, and you'll probably have to pay your vendor to do the research.

So, if you're up for it, create a sandbox environment of your Business Central, do your own research on AppSource and try out apps in your sandbox.

Maybe you need to add fees to sales orders. Business Central is not very good at this by default. But maybe someone has made an app for it.

It could also be that you need to calculate commission for customer. Business Central is not very good at this by default either. But maybe there is an app.

And if there is an app that seems promising, you can challenge your ERP supplier to take a closer look at it together.

You can also uninstall an App if the functionality is no longer needed or if you want to switch to another App with better functionality.

## Updating apps

App vendors are responsible for ensuring that their apps meet Microsoft requirements and are updated to the latest version of Business Central - unlike custom add-ons (PTE), where you have that responsibility.

App vendors may release updates to their apps on an ongoing basis, but you can choose when you want to install the updates from the Admin Center (more on that later).

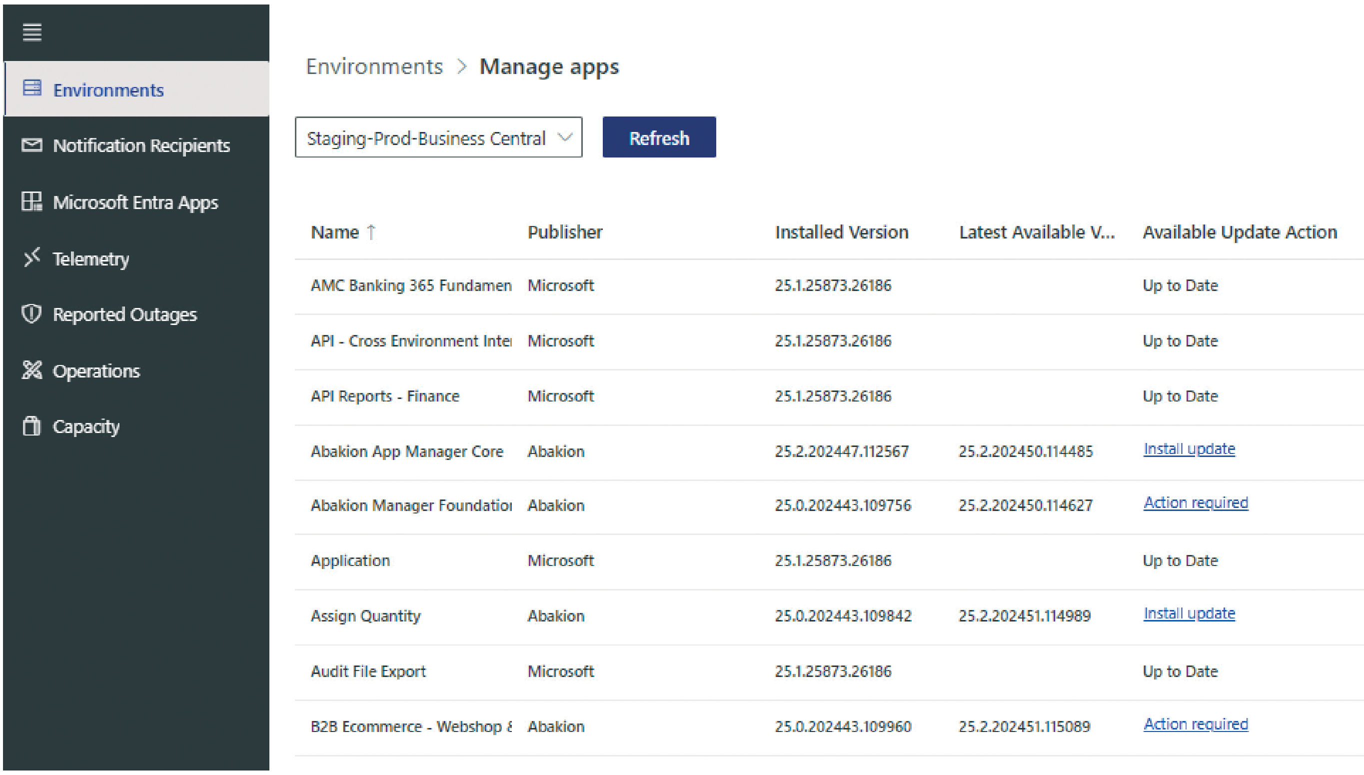
Business Central automatically upgrades all apps with major releases, but you can also set them to be upgraded automatically with all minor updates every month.

As an ERP manager, you must have a strategy for how up-to-date you want to be. Are there some apps that you want to update immediately when new versions are released? Are there other apps where updates are not urgent?

How do you stay up to date on new features and bug fixes coming to your apps that might make it relevant to upgrade? Your app vendors should keep you updated, and you should have a procedure for how and when you evaluate new versions of apps.

With updating apps, the same applies as for Business Central:

You need to test new versions before they hit your production environment. Sometimes apps conflict with other apps, with development you have done, with your processes in Business Central, or with new functionality in Business Central.




You can expect your app vendors to make sure their app works on the latest version of Business Central. They have an obligation to Microsoft to do so. But it's you, the ERP manager, who has the problem if they don't live up to that responsibility. And they probably haven't tested their app with all the other apps available on Microsoft AppSource.

## If you use apps from multiple vendors, it's not enough that each one works flawlessly on the new version - they must also work flawlessly with each other.

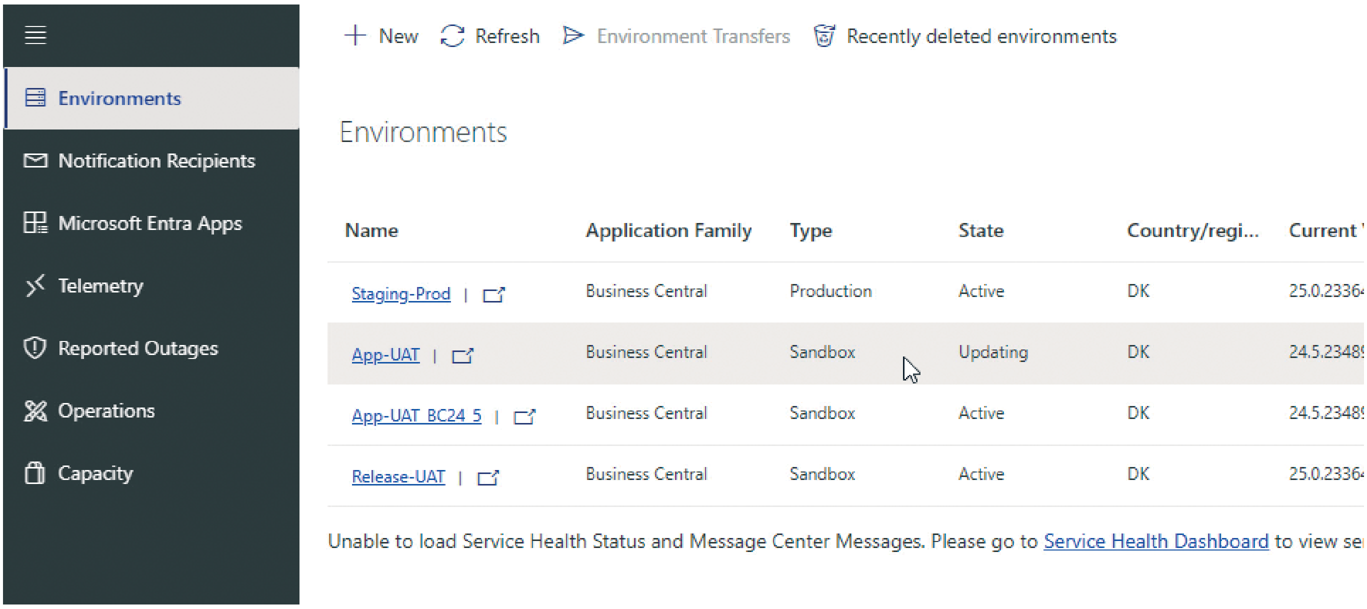
You may be able to outsource the responsibility and the testing task to your ERP vendor, but you have the overall responsibility for getting the job done. You can't rely on your ERP vendor to proactively test the overall solution before an update if you haven't agreed on the task with them.

You also need to consider whether the supplier knows your company's processes in enough detail to perform an adequate test. If the test is too generic, it creates a false sense of security.

# ADMINISTRATION

You can manage a lot directly in Business Central, but as an ERP manager you need to know the Admin Center. You access it via your Dynamics 365 account and it requires you to have administrator rights, but as an ERP administrator you must be able to use the Admin Center.

There you can manage your environments, i.e. the production environment with your live Business Central and the sandbox where you can test new apps and versions. You can also control which apps are installed on each environment. And you can see if updates have been released for the apps you use.




## Development environments

We're going to talk about development and testing environments. It's a good idea to have a sandbox environment where you can test apps and try out new ideas and possibilities. But if you're developing functionality for Business Central, you also need a development environment.

There is no such thing as a "development environment" in Business Central. There are production environments and sandbox environments, but you can dedicate one of your three sandboxes to be a development environment where you test new functionality.

You should not allow anyone to test directly in the production environment - or install an app without having tested it in a sandbox environment - or otherwise put something into production without testing in a sandbox.

If you merge code into production and encounter an error, it often takes 10 times longer to clean up the data than if you had discovered the error in a development environment. Not only do you have to fix the code, you also have to fix or roll back all the transactions and data that were generated incorrectly while the bug was in production, and the system will continue to generate incorrect data until you fix the bug, so you're also under time pressure to stop the disaster.

There are several reasons to test.

It's not just to discover mistakes. It often happens that you learn something along the way. Your ERP vendor has developed exactly what you asked for and it works flawlessly, but when you test it, you realize that you forgot something or that it could work smarter in a different way or with an improvement.

The devil is often in the detail of special exceptions to processes, and even experienced users and consultants can't think through all potential scenarios in the first place. You can't expect them to.

In a sandbox, becoming wiser is no problem. In the production environment, it causes a lot of cleanup that could have been avoided.

Create a copy of your production environment as a sandbox and test the new features there. Then you have a test environment that is a true copy of your production environment. This makes for the best testing. And remember to delete the old sandbox environments from the last test. You can do this yourself in the Admin Center or get help from your supplier.

As an ERP manager, you need to have a procedure for development and testing environments.

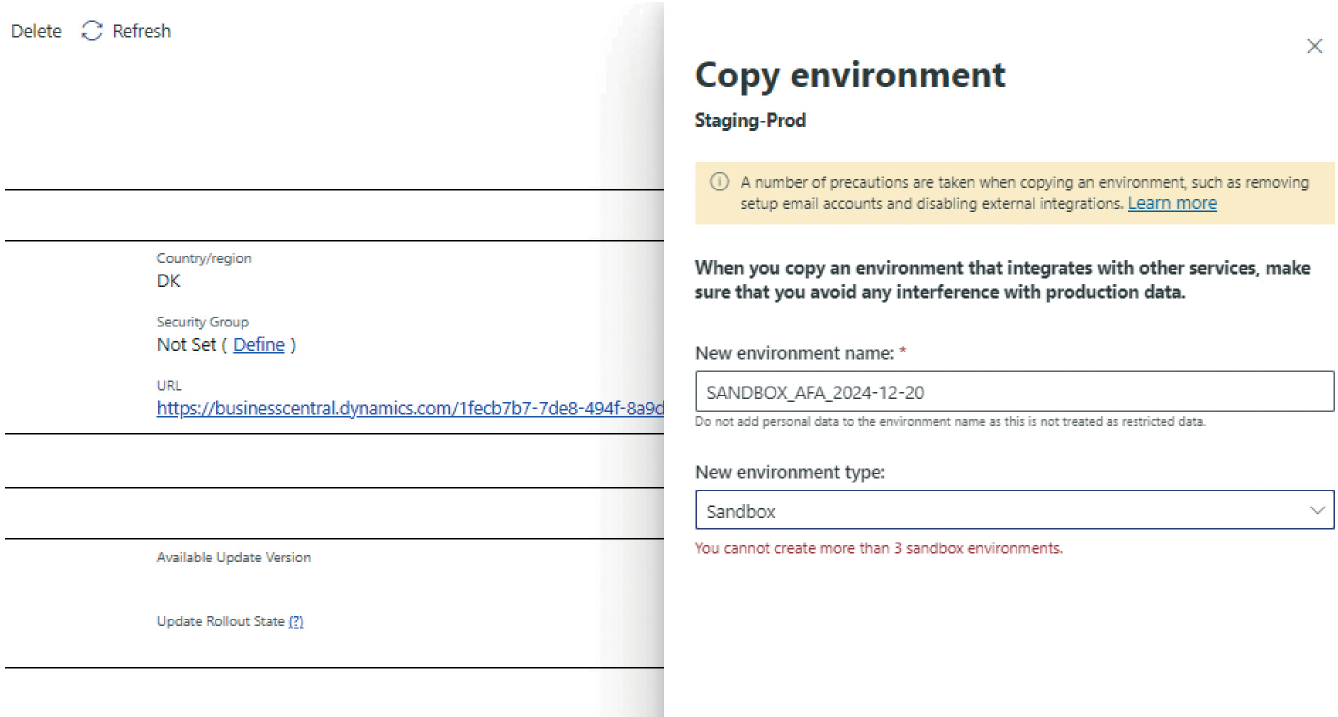
## Sandbox features

In a sandbox, you must be aware that there are a number of processes that are not running. Job queues are stopped, as are integrations and other processes that send data out of Business Central.

This means you can post an invoice without a job queue sending an email with an invoice to your customer. Or you can enter test data without integrations synchronizing test data to your other systems. It's very smart.

But if you've had development done or apps installed, as an ERP manager you need to make sure that they also work in a sandbox without sending or synchronizing anything or doing anything else that you don't want.

It's a responsibility that is no different with a cloud solution than with an on-premise solution. When you set up a sandbox environment, you always have to check that job queues and integrations are turned off. That's the way it has always been.




But the difference is that in the old days, a developer at your ERP vendor would create the environment and job queues and integrations would be on the developer's checklist. Today, as an ERP manager, you can create environments on your own from the Admin Center, which also puts you in charge of the checklist.

## Backup

It is also in the Admin Center that you will find backups. Microsoft saves backups 28 days back in time, and via the Admin Center you can perform a restore of a backup on your own. You can also restore a deleted environment to a limited extent.

If there is a problem with data, apps or customizations, you can choose to roll back to a backup point where you know the system was fine. You can initiate a restore of a backup from the Admin Center, and of course you should only do this if you know exactly what you are doing and know the consequences. You will lose the work that has been done since the last backup.

But you don't actually have to get your ERP vendor to do anything.

You can choose to have an expert to review the consequences of a restore, but you can also take charge yourself. But in any case, the initiative must come from you.

# Data volumes

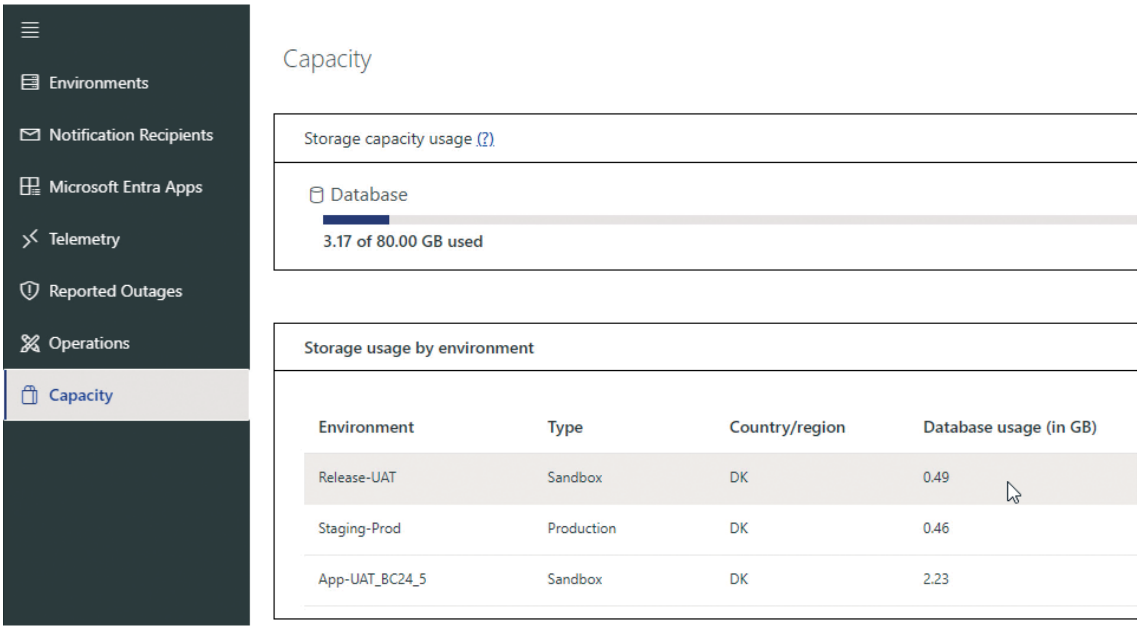
One of your admin tasks is to manage data and environments. If you have a lot of data, you may need to purchase additional storage. You have 80 GB available across all environments.

It's not that the system will shut down or slow down if you reach the 80 GB limit, but you will simply be prevented from creating new environments. And you'll probably be contacted by a salesperson to sell you more storage space.

But as an ERP manager, it's a good idea to have insight into what takes up space in the different environments.

In the Admin Center, you have access to see how much space each of your environments is using. For example, if you have multiple sandbox environments, you can choose to delete the environments that are no longer being used so they don't take up unnecessary space.

If you have many companies in Business Central that you no longer use, it may also be a good idea to remove them, as a company can take up a lot of space. For example, if you've made a copy of your production company that takes up 5 GB, the copy in the sandbox will also take up 5 GB. If you have a lot of legacy sandboxes, you'll quickly use up the space.




# Monitoring space usage

As an ERP manager, you can keep an eye on space usage both inside Business Central and from the Admin Center. For example, you can see if the item table is taking up a lot of space and ask your ERP supplier what the reason might be.

Here are some of the things you can do yourself, and the following section is about setting up automated procedures.

Business Central has a feature called Table Information, which allows you to view all data in a table or across tables, so you as an ERP administrator can see which tables take up a lot of space. There may also be scenarios where it is relevant to be able to dive into all the data of the solution.

If you want to tidy up to save space, you can look at Tenant Media, for example, where the solution stores attachments, because it can take up a lot of space.

Table Information

Data Administration | More options

| Company Name | Table Name | Table No. | No. of Records | Record Size | Size (KB) ↓ | Data Size (KB) |
|---|---|---|---|---|---|---|
| Dynus | Item | 27 | 72 | 568,89 | 480 | 40 |
| 760 Subscription 10.23 cfa | Prod. Order Capacity Need | 5410 | 354 | 185,13 | 480 | 64 |
| LGJ 2023-09 Customs | Bin | 7354 | 1385 | 82,81 | 472 | 112 |
| GMDS DSC SUB | Bin | 7354 | 1384 | 82,87 | 472 | 112 |
| GMDS DSC MASTER | Bin | 7354 | 1384 | 82,87 | 472 | 112 |
| Dynus – Webshop UAT | Bin | 7354 | 1385 | 82,81 | 472 | 112 |
| 660 Duty reporting CFA | Bin | 7354 | 1384 | 82,87 | 472 | 112 |
| DYNUS_AFA_IC_SALES_2024-1... | Translation | 3712 | 2229 | 117,61 | 464 | 256 |
| Dynus Supply | SCB MDI On Documents | 6223230 | 3391 | 99,05 | 464 | 328 |
| DYNUS AFA 2024-07-24 | Translation | 3712 | 2193 | 123,27 | 464 | 264 |

Table Information really just shows you tables across all companies, so it can be quite heavy to run in Business Central. If you have 8 companies, that's 8 times the item table, 8 times the customer table, etc.

You can also consider whether images stored in Business Central can be moved to an external platform like SharePoint to reduce the space they take up.

As an ERP manager, you must take the initiative to clean up data and keep an eye on what's taking up too much space. Your ERP supplier probably won't do this on their own, unless you have agreed that they have the task.

It's not normal to need extra storage space. You have 80 GB available, which is enough for most businesses. However, you may need it if you are a large company that sends a lot of emails from Business Central or stores all your images and attachments in the system. You can also run out of space if you frequently create new sandbox environments for testing - and forget to delete the old ones you no longer need.

## Retention policy

In addition to the check-ups you can manually perform, it's also a good idea to have a retention policy so you can handle data that is no longer needed.

Business Central stores a lot of data, but not everything needs to be stored forever. Some data needs to be stored for the system to work properly. Others need to be stored to comply with legislation, but there are many areas of data where you as an ERP manager can adopt a retention policy. For example, sent emails, archived purchase orders, archived sales orders, change log entries, etc.

You should have an opinion on how long you want to keep such records and documents. For example, you can set up a policy that sent emails are stored for six months and then deleted.

Most companies don't run out of space, but if you send a lot of emails with attachments, for example, it can take up a lot of space.

Business Central stores all sent emails, which is similar to the functionality you know from Outlook. While an email may not take up much space on its own, that can quickly change if there are attachments such as PDF invoices, images or manuals. This can take up a lot of space in the system.

It's also very common that when you receive an item on a purchase order, you then receive the invoice from the supplier, and then you receive the lines from the related receipt to the invoice. This is how you normally do it.

But when you post the invoice, Business Central does not delete the open purchase order. You will have a purchase order that is fully received and fully invoiced.

Of course, you don't have to manually delete records and documents when enforcing the retention policy. You need to set up job queues to perform the cleanup. We recommend that the job queue cleans up continuously so that it can take the deletions in small chunks, because if Business Central has to evaluate an entire year or several years of data, for example, it feels a bit overloaded.

Please note that rules for deleting financial records are managed in the general ledger setup, where it can be managed by dates.

## Automated jobs

In Business Central, you can automate tasks using job queues. With job queues, you can set up automatic runs of tasks such as report generation. If you have a report that needs to be generated every month, you can set up a job that automatically generates and delivers the report to your inbox on the first day of the month. You can choose to run the job outside of regular working hours so it doesn't burden the system during working hours.

For example, you can use job queues to automate the sending of invoices. If you post a lot of sales invoices, you might not want to wait for the invoice to be sent every time. You just post and a job will automatically send the invoices later in the day or at night. This makes it possible to separate heavy processes from your normal work tasks.

But it also means that as an ERP manager, you need to keep an eye on the job queues to make sure they run smoothly. It's no good if the invoices don't get sent and you risk not noticing the error because the heavy process was separated from your normal work tasks.

Job queues can fail, for example, if an email address is missing for an email to send, or if a job needs to import exchange rates and for some reason cannot complete the task. Business Central will then use outdated exchange rates.

In this case, Business Central will mark the job as failed and you can quickly see what the problem is so it can be fixed.

It's a good idea to make it a daily routine to check your job queues - almost like an engineer checking that everything in the factory is running smoothly.

To make sure you are quickly aware of errors, you can configure alerts to be sent when a job queue fails. Although standard Business Central doesn't have a built-in notification feature, you can use tools like Power Automate to set up an automated alert. This means you can get an email or notification on your phone if something goes wrong in a job queue.

For example, you can set up an alert that sends an email to the responsible employee as soon as a job fails, helping to react quickly and avoid major problems.

There are also a number of apps that can help you with monitoring.

# PERFORMANCE OPTIMIZATION

Performance is about the user experience of how fast Business Central responds and executes processes. In the old days, you could put more RAM in the server to make it run faster, but today you have nothing to do with the hardware because you subscribe to the software as a service.

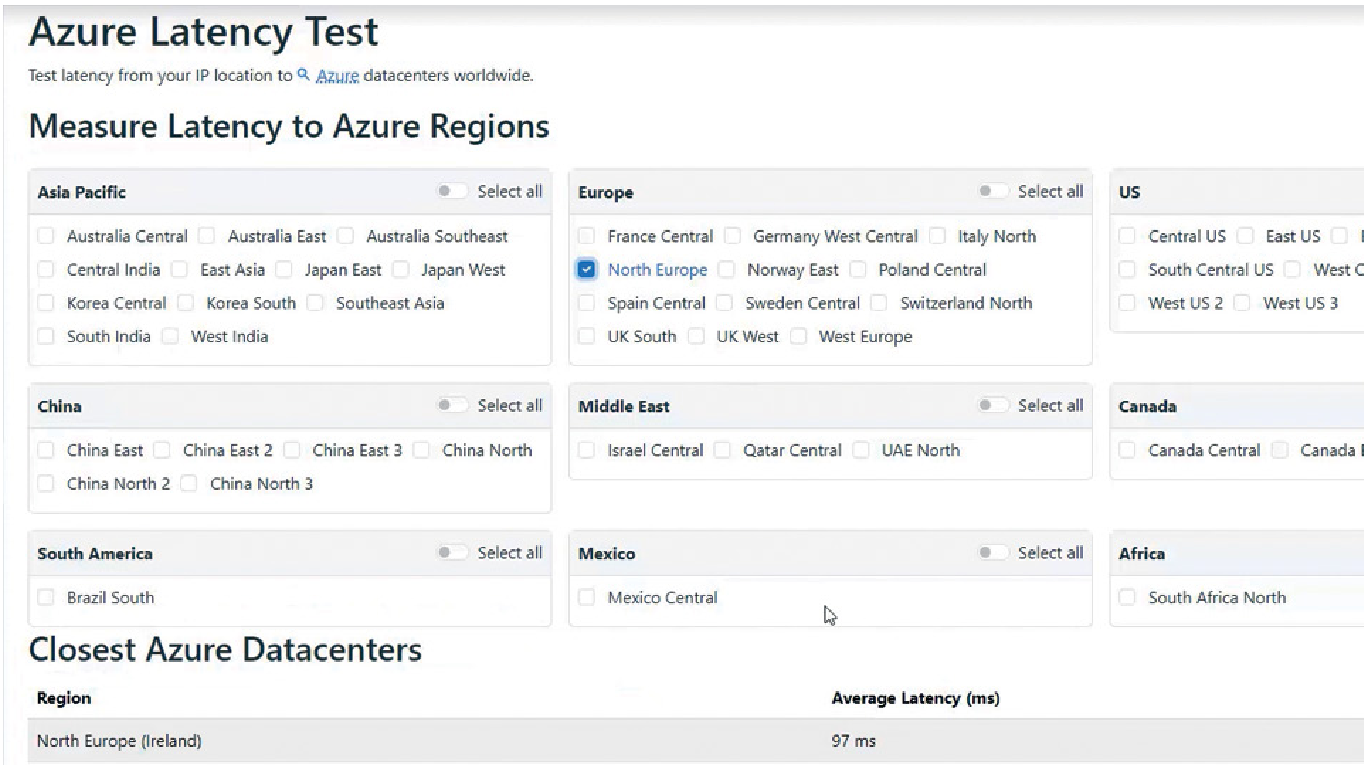
Performance optimization is about something else today.

## The internet connection

### Performance depends on many things. The most important is your internet connection.

Every time you do something in Business Central, the command must be sent to a server in a Microsoft data center, sometimes in another country, and the response must be returned.

The most limiting factor in the journey between your computer and Microsoft's data center is usually your own internet connection. Latency is measured in milliseconds, which is an expression of the delay in data transfer.



You can check how good the connection to the data center is yourself. In the Admin Center you can see in which data center your Business Central data is located. You can also perform a test on azurespeed.com to see if it's the fastest data center for you, and you can check how much your efforts to improve the internet connection are helping.

If the internet connection isn't good, then all other measures don't really matter.

## Optimization in Business Central

There are also optimizations that you can perform inside the application.

When you open a page in Business Central, it does not retrieve all data immediately, but only the data you can see. On a customer list, Business Central only loads the customers that are visible at the top of the list, and when you scroll the list, then it loads the next customers as needed.

The more data that needs to be loaded, the longer it takes Business Central to prepare a page for you. Therefore, it only loads what is visible. However, if you have pages with a lot of data visible, they will naturally take longer to load.

This means, for example, that if you have the fact box on the right side of the screen open, the page will take longer to load because Business Central needs to retrieve more data.

If you have performance issues, try closing the fact box. Also consider hiding fields that you don't use anyway, as this will also improve performance. The more Business Central must show, the longer it takes.

This also applies to role centers. There are a lot of KPI's, and if you remove some of them that you don't use anyway, you save time. You might save a quarter of a second, which doesn't sound like much, but today we've gotten used to systems responding instantly, and a quarter of a second can be noticeable.

Also, pay attention to whether apps are installed on the pages where you experience performance issues. You can easily see this under Page Inspection and the Extensions tab. Most vendors have a checklist that you can go through together if you are experiencing performance issues.

## Performance Profiler

In Business Central, there is a functionality that can help you solve performance challenges called Performance Profiler.

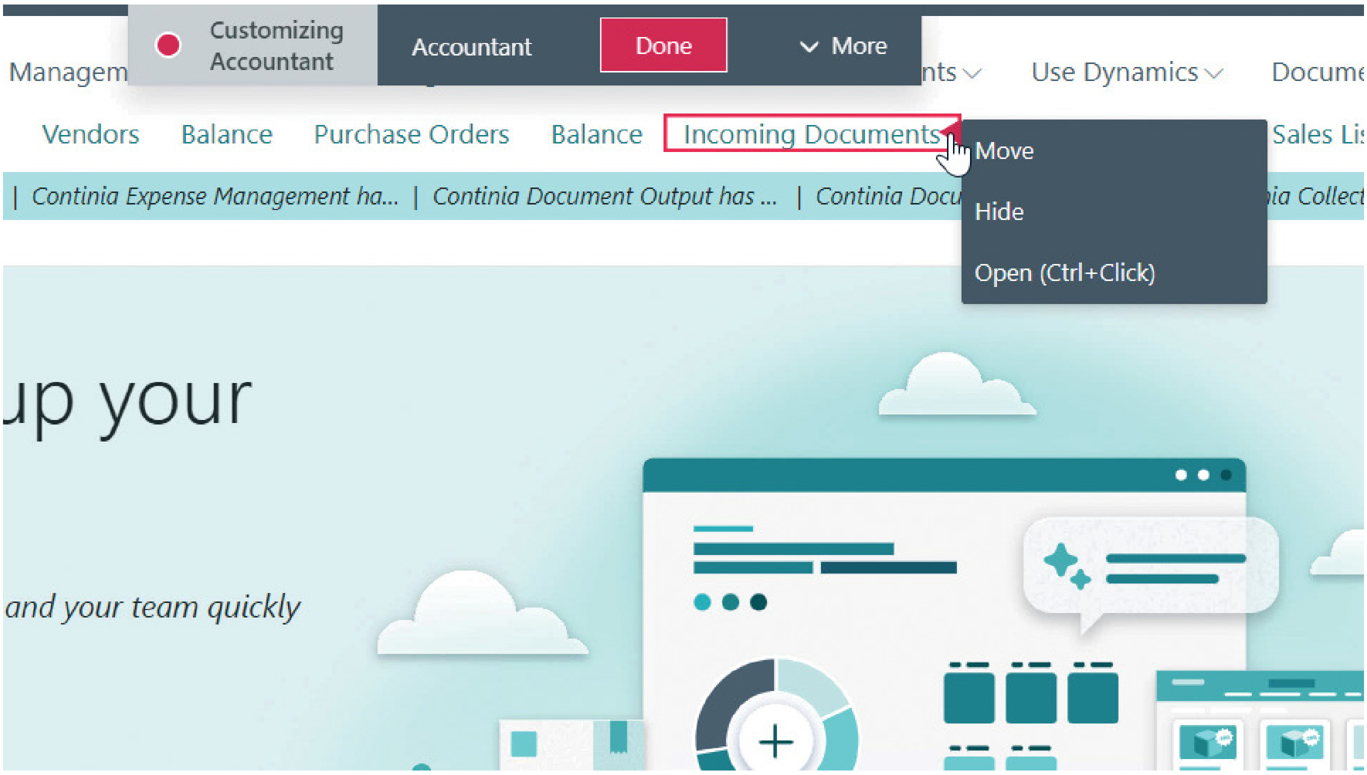
It makes it possible to record the processes performed, e.g. if you post a sales order, and then analyze which code elements potentially cause delays.

**Time Spent by Application Object**

| Object Type | Object Name | Time Spent ↓ | App Name |
|---|---|---|---|
| Table | Warehouse Shipment Header | 218 milliseconds | Base Application |
| Codeunit | Release Sales Document | 218 milliseconds | Base Application |
| Table | Purchase Line | 218 milliseconds | Base Application |
| Table | Job Planning Line | 218 milliseconds | Base Application |
| Page | Sales Order | 218 milliseconds | Base Application |
| Page | SCB DHA Sent Emails FactBox | 212 milliseconds | Document Handling |
| Codeunit | Graph Mgt - Sales Order Buffer | 118 milliseconds | Base Application |
| Codeunit | Sales Alloc. Acc. Mgt. | 117 milliseconds | Base Application |
| Codeunit | Approvals Mgmt. | 117 milliseconds | Base Application |
| Codeunit | Price Source - Cust. Disc. Gr. | 112 milliseconds | Base Application |
| Codeunit | SCB GM Event Handling | 112 milliseconds | Global Master Data Sync |

By enabling the performance profiler, you can get a detailed overview of which parts of the system are taking extra time. For example, if it turns out that a certain app is taking 10 seconds to process data, you can more easily present the challenge to your app vendor.

This allows you to better diagnose problems yourself without necessarily having technical knowledge, and it makes troubleshooting more efficient.



# ROLES AND RIGHTS

Now we're focusing on the users. You need to make sure they have access to the right data and features, and that they have the tools they need to do their job effectively.

Many people confuse the concepts of roles and rights. Roles are about what functions the user has on their home page, called a "role center". Rights are about what the user is allowed to do and have access to.

## Role centers

Role centers are the system's home page, helping each user get an overview and easy access to the most relevant functions.

Too many Business Central users start with a random role center and then stick with it without giving it much thought.

But role centers are built for specific roles, so it's best to use the correct role center and even customize it to your work tasks. There are also many employees who has multiple roles, and they can benefit from switching between role centers.

But getting access to a role center doesn't mean you get more user rights in the system. The Bookkeeper role center does not give you rights to bookkeeping - you need to have those rights assigned separately.

As an ERP manager, it's a good idea for you to help users explore and customize the role centers. As an ERP manager, you are also responsible for what we in the IT industry call "adoption", which refers to the degree to which users utilize all the capabilities of the solution.

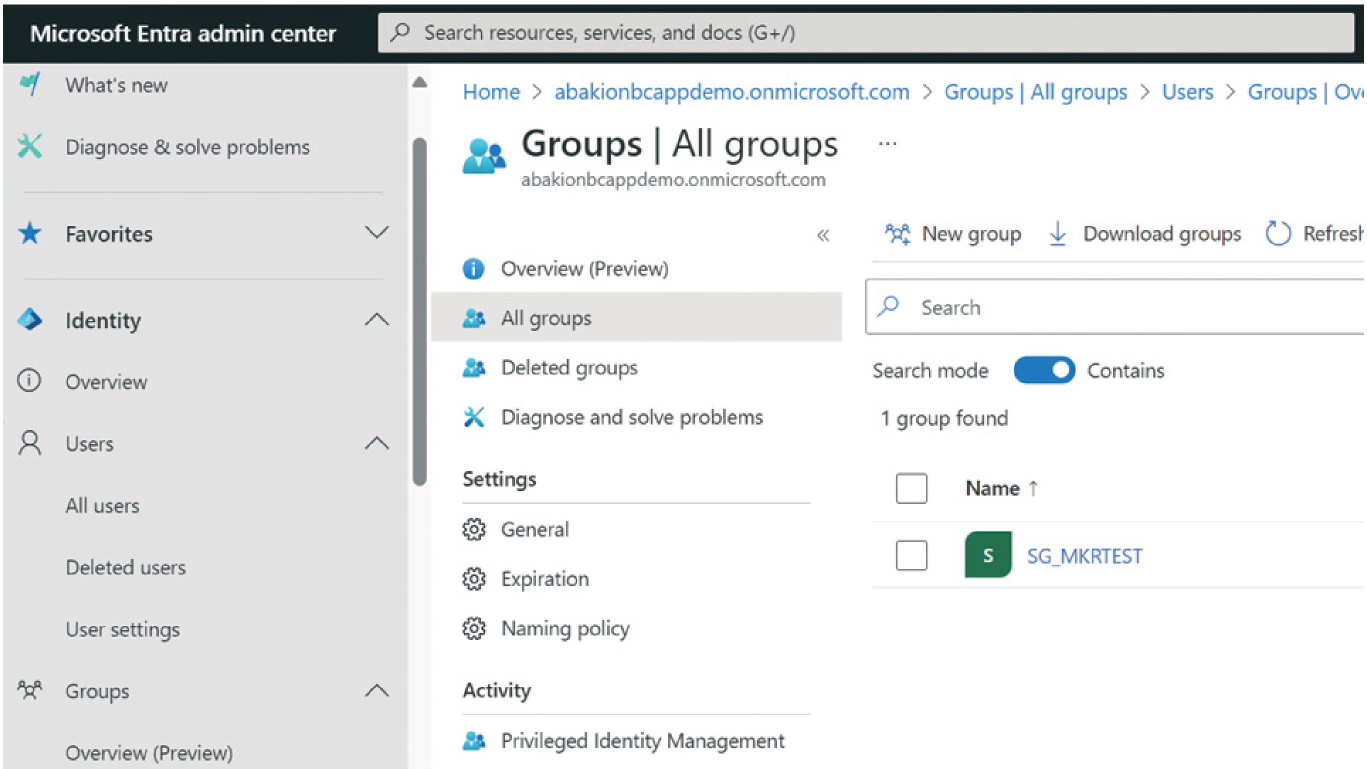
Displaying the functions and information that are important for a specific role in the company on the role center helps users in that role to make better use of Business Central.

## User rights

Business Central is a large system with many functional areas, so managing access rights for users in Business can quickly become extensive.

Unfortunately, this means that many people assign all rights to all users, making them super users with access to everything, which is obviously not a good way to handle the challenge.

Your external auditor will also point out that it's not appropriate for everyone to be a superuser and they will ask you to change this.




There are also many business questions to consider. Who can create a purchase order? Who can make a payment to a vendor? Who can edit a vendor's master data and bank details? The combination of the three is bad in any case, but if an accounts payable employee must be able do all three things at different times, not only must access rights be set up, but also business processes.

You can manage rights via security groups in Business Central. In Entra ID you can define which security groups each user is a member of, and in Business Central you can set up what rights a security group has.

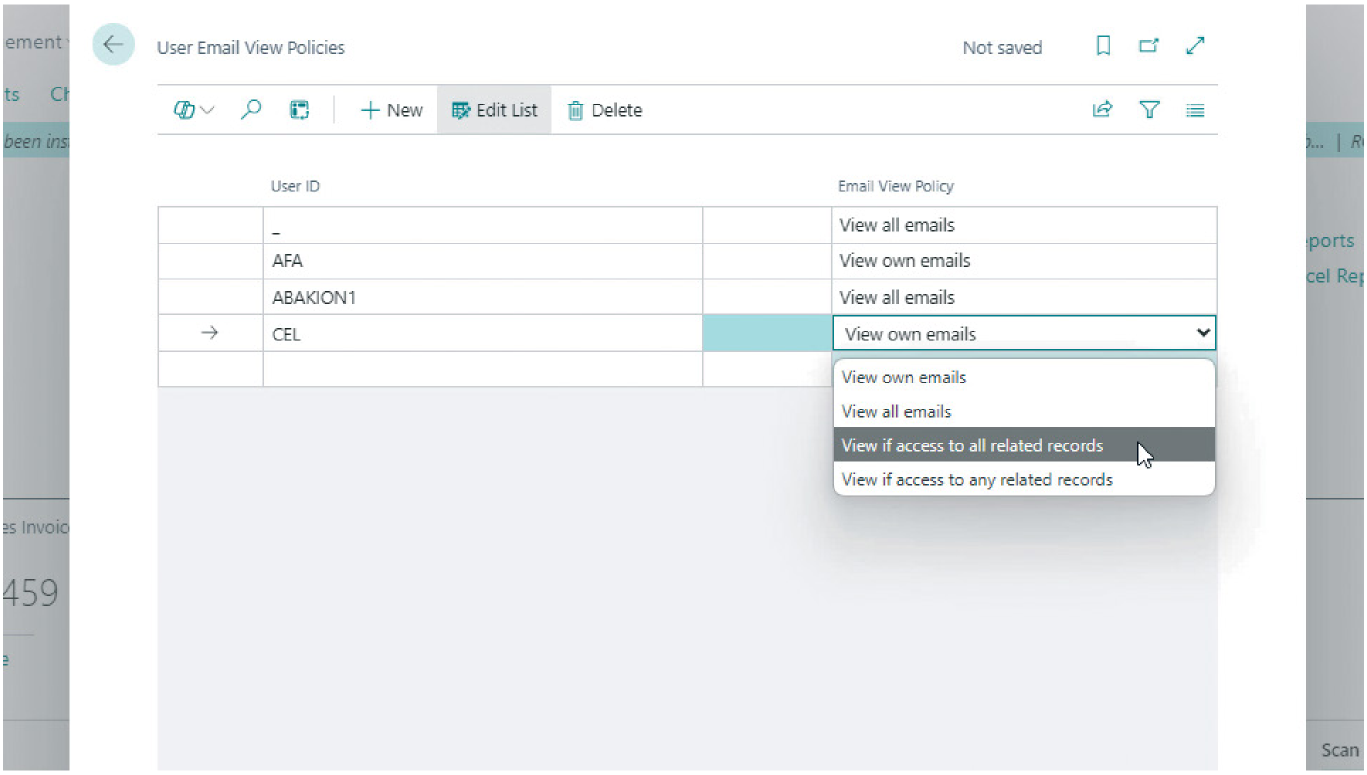
It's a complex topic that we won't try to cover in a few lines here. It doesn't have to be complicated, but you need to have experience of what to do, which is why it's a task that many people choose to hire consultants to do because it requires insight into the structure of Business Central.

## Who has access to view emails?

Emails are a separate story when it comes to access rights.

The sent emails are stored in Business Central, where you as an ERP administrator can set up who can see which emails. Can you only see your own emails - or others as well?

For example, it may make sense for all bookkeeping employees to have access to the emails sent by colleagues in the accounting department so that everyone can respond to inquiries from customers and suppliers.




Conversely, in a sales organization, you may not be allowed to see each other's emails with the offers that have been sent out. Then you can only see the offers you have sent yourself.

It sounds a bit like user rights, but they are actually rights that you set in different places in Business Central. The permission configuration in Business Central determine whether you have access or not. For example, whether you can view customers or not, or whether you can edit customers or not. It's a question of whether you technically have access or not.

Email rights go a step further and regulate whether you can see other people's data or only your own data.

We'll also talk about two other tools that ERP administrators can use to manage business processes: changelogs and approval workflows.

## Changelog

One of your tools as an ERP manager is to enable Changelog in Business Central. If you set up Changelog on changing bank details on vendors, Business Central will log all changes, so you can reactively see exactly who has made changes to a vendor's bank account.

Most external auditors expect you to have changelog enabled on bank information, but it can also be used in many other areas.

There is no security in a changelog – it's just history.

You can use changelogs to document breaches in business processes - but you can also use changelogs to find the causes of problems, for example when someone has corrected data in good faith but it turns out to have an unintended consequence somewhere else.

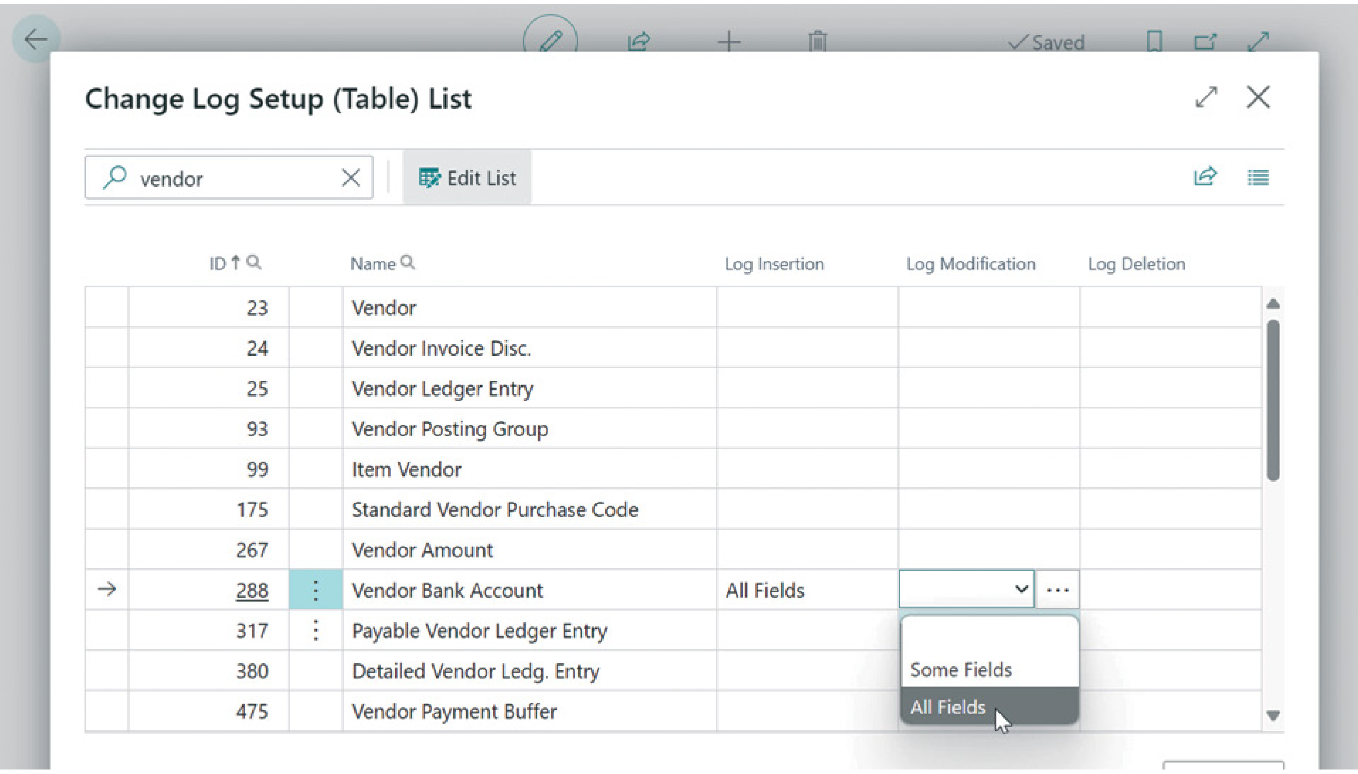
## Changelogs are reactive control. It's looking back in time.

If you want to increase response time, you can mark your data as "sensitive" and get a notification immediately when someone changes data. Consider whether you have the right procedure in place to respond to notifications, otherwise they have no effect.

## The changelog is very useful, but make sure you only log what you need.

Use it in the critical areas such as payment information and cost prices, but don't log all postings. It makes Business Central work twice as hard and creates a lot of data in your database.

You also need to consider your log retention policy, i.e. how long time is it relevant to save the changes that have been made? You might want to be able to see changes to payment information going back many years, but when it comes to order confirmations, you don't need to keep a log for a very long time, you just need to be able to find the reason why something went wrong recently. Consider what you want to use each log for.



## Approval workflows

Change logs and marking of sensitive data are reactive controls and if you want to proactively avoid unwanted data changes, you need to set up an approval flow.

It's a process where a change requires one or more employees to approve the change.

For example, you can set up a process for one person to approve purchases up to $10,000, but above that it also requires approval from their manager. Or that a sales credit note can only be posted after a manager has approved it. Or that transferring payments to the bank requires approval.

It makes sense to build approval flows with Microsoft Power Automate, a process tool that can use data from Business Central and which you may already have included in your Microsoft 365 license.

By default, Business Central has some templates for approval flows that you can build on, but this requires some skills in Business Central.

Microsoft will say that Power Automate is also Business Central's own tool. And that's true. We need to get used to the fact that it doesn't matter whether a function exists directly in Business Central or in Microsoft Power Platform. It makes sense to build all kinds of approval flows in Power Automate.

As an ERP administrator, you should consider which areas it is relevant to apply approval flows to. It's not just about securing the business against fraud. It's also about ensuring data quality, ensuring that business processes are followed, avoiding errors that result in manual data cleanup, and creating credibility in the organization around business processes.

For example, you could have a procedure for creating a new item so that the warehouse manager, purchaser, marketing and finance all contribute to ensuring high data quality.

There are many possibilities with approval workflows. But be careful that your processes don't become too cumbersome in everyday life. You need to consider how much everyday productivity you want to sacrifice.

Employees need to be able to work efficiently - even if a colleague who is part of an approval process falls ill. Find an appropriate level that you, your employees and the external auditor are happy with.

# DATA AND PROCESSES

As an ERP manager, you sometimes have to step onto the factory floor and inspect that all machines are still running well.

Your role as an ERP manager is not only to make sure Business Central is up and running. You can also help your organization use the solution effectively.

It's all about processes and data cleanup, and we will dive into that now.

## Are all processes running?

As an ERP administrator, you should monitor that processes do not stall. It could be that a newly created item contains an error that causes a run to fail.

There are probably periodic reports that users would like to have. It could be an inventory valuation report, and if you have a lot of items and entries, the report takes a long time to generate. No one wants to wait for that, so instead you set up a job queue to generate the report once a month and deliver it to the inbox on the front page of the role center.

Your Business Central probably contains many of these kinds of processes and you should monitor that everything is running smoothly.

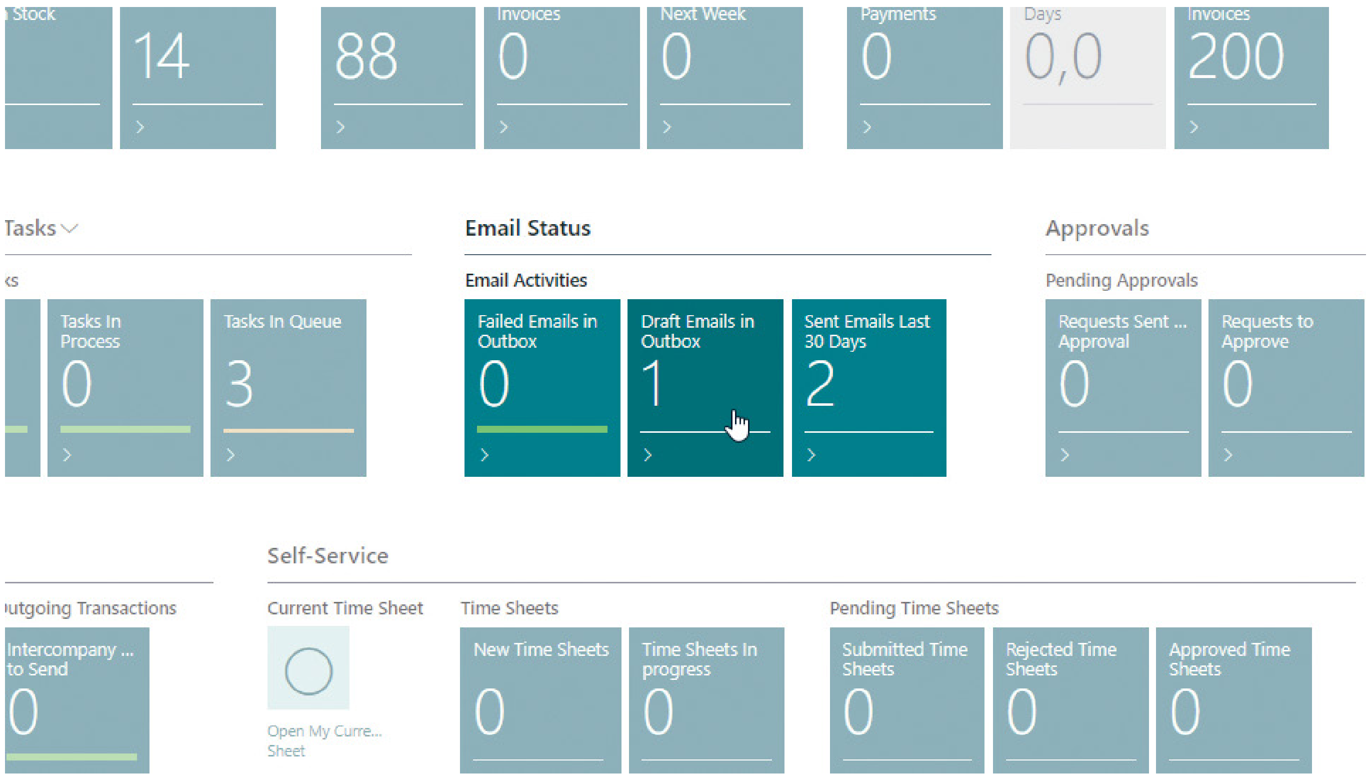
## Effective processes

As an ERP administrator, you should also care about whether your organization is using the solution effectively.

Sometimes there are manual processes or Excel sheets that you should get system support for with Business Central. Sometimes it only requires a few checkmarks and a little user training - other times it might require an app to support the process.

## Have all emails been sent?

As part of ensuring day-to-day operations, it's good to follow up on whether all emails have been sent from Business Central. There is probably a tile on your role center that shows if you have emails that have not been sent.




For example, you may have a job queue that sends out invoice emails, and it's obviously important that they all go out. You should make sure that someone checks all the emails hanging in the outbox in Business Central. This is part of your tasks as an ERP manager, making sure that everything is running smoothly in Business Central.

Should those emails have been sent or is it correct that they have not been sent? Maybe there's a comma instead of a period in the email address. The earlier you catch the common mistakes that prevent emails from sending, the less there is to clean up.

## Cleanup and reconciliation

As an ERP administrator, you need to proactively clean up and reconcile Business Central so that everything is processed, posted and reconciled on time, so you don't risk having to re-open and clean up old accounting periods.

As the ERP administrator you must monitor that the solution is running as you expect - that there are no challenges that become more difficult to resolve reactively. You need to clean up and reconcile before you close the period.

It could be a purchase order where items have been received but the invoice has not yet been received. Later, when the invoice is received, you can by mistake receive the items in inventory again.

If you then count that there is 1 on the shelf, but there are 2 in the system, it would require an inventory adjustment. It could also be that the supplier has yet to send the invoice, and you have received a quantity of items that have never been valued.

You may be waiting for a purchase invoice that you won't receive for another three months. This comes as a surprise because the items were received many months earlier during a closed period.

We also often see challenges with direct posting, where you have some consolidation accounts, such as Customer, Vendor and Inventory where posting normally are done indirectly using the Posting Setup or system accounts and some postings have been done manually on these accounts.

For example, you may post an inventory adjustment of 2 million, and when you subsequently run a value report on the inventory, it shows 10 million, while the balance sheet shows 8 million. There shouldn't be a difference, but the question is whether you forgot to uncheck 'direct posting' on the financial account.

It could also be that items are not set up correctly. If raw materials are set up to be posted to the finished goods account, this will cause differences.

You also have 8 open purchase orders, and some of them are old. One should be canceled and another is three months overdue. But when they're not updated, the system mistakenly thinks that items are coming in and your MRP won't suggest the purchases that are needed.

There may also be general journals that have not been posted. Employees that quit the job might have been working on different documents or journals that are unposted. Old picking lists that remain unhandled. And so on and so forth.

## The sooner you discover challenges - the easier they are to clean up.

It's an ongoing process of cleaning up and reconciling accounts so when you do the monthly financial reporting, you can close the period and move on without colleagues needing to post backwards in time and change the result of the old period. You need to close the old period with peace of mind.

As an ERP manager, you need to get an overview of where challenges typically occur in your solution - so you know what to look out for.

Unless you invent a clever dashboard, you have to monitor many types of data manually. You have to check if there are purchase orders that should have been received before today. And if everything in the general journals are posted. And so on and so forth.

Of course, you can set up filtered views in Business Central to help identify any challenges, making it a more manageable task.

It pays off to keep an eye on data. The longer it has been since the error occurred, the longer it will take to correct it.

If you talk to relevant colleagues every month about the journals and data that seem odd to you, you won't suddenly have to post far back in time and reopen closed periods.

## Master data and good data quality

Ensuring that master data in Business Central is correct is an important task. 'Master data' is all the basic data in the system that is not transactions, such as customers, suppliers, items, assets, etc.

As an ERP manager, you should know who is responsible for master data in your organization. This is always a bigger task than you might think.

What data must be recorded on an item and in what form? What data should a customer card contain for invoicing or for a Power BI report to be accurate?

It's bad enough if colleagues don't trust data in ERP or reporting, but it can also lead to wrong decisions if master data is not in order. You have caps categorized as apparel and t-shirts as accessories, and you can see that you make good money on apparel, so you want to focus more on t-shirts, but that would be a mistake.

Many companies can't agree on what the cost price of an item is because everyone pulls data and calculates in their own way. We've met companies where they can't even agree on what the item number of an item is.

If you have many companies, data discipline is especially important to ensure that master data remains synchronized across companies.

Master Data Management is a discipline in itself. It requires both well-defined workflows and frequent check-ups. Few companies have a dedicated Master Data Manager, but everyone needs someone in the company whose role is to be responsible for master data.

A consensus on what good data quality is doesn't happen by itself. It must be agreed upon and compliance must be managed.

When there is no standard for how data is created, it is created in many different ways.

# COLLABORATION WITH THE SUPPLIER

As an ERP manager, you also need to know what you can expect from working with your ERP vendor and you need to know the license terms for Business Central. Let's start with the licenses, which with the Cloud solution is a subscription.

## License terms and conditions

There are many license terms from Microsoft and they change regularly, so it's quite important that you have an ERP partner that stays updated and advise you on changes, opportunities and campaigns so you don't have to research everything yourself.

However, there are some basic things you need to know. Microsoft writes in a very complicated way when describing the conditions, so we'll try to explain it as simply as possible.

Microsoft Dynamics 365 Business Central is offered on a subscription basis, where you pay for a month or commit for a longer period. The most important thing to consider is the number of users. You can adjust the number of users on an ongoing basis, but you need to make the change with a notice stated in your subscription terms. Your supplier should help you with this.

Today, you can shop with many different suppliers at the same time. In the past, your license could only be managed by one vendor, but today your subscription can be spread across many vendors. If you have purchased additional users from three different suppliers, you will receive subscription invoices from all three.

"Full user" is a user license with full access, and it comes in an Essentials and a Premium edition.

Essentials includes almost everything. Only the production management and service management modules are only available in the Premium edition.

Within one environment, all users must be of the same type - either Essentials or Premium. If you have 20 users and 2 of them want to use the Service Management module, then all 20 must be Premium. You cannot mix.

In addition to that, you can get Team Members, which is a user type with limited access to the system. A Team Member can read data and perform simple tasks, but cannot, for example, post in the system, regardless of the rights you assign them. However, they can be approvers in approval flows.

Team Members is a much cheaper user license, and they cost the same regardless of whether Full users are Essential or Premium.

"Full users" and "Team members" are all named users. In the old days you counted "concurrent users", but today you must name the users. You need to subscribe to the number of users who will be using ERP.

In addition, there is a type of user license called Device Users, which is not assigned to a named user, but rather to a device that can be used by many employees, such as a scanner or a computer in the production hall used for consumption registration by many employees.

That's the ultra-short overview of the subscription terms and conditions. Find yourself a supplier who knows what they're doing - and keep up with Microsoft's many promotional opportunities so you don't miss out.

## Who is in charge?

You actually have two suppliers when you use Business Central. There is Microsoft, who developed the solution and maintains and updates it - and there is the delivery partner, who implements Business Central for you and supports you on a daily basis.

Who is actually responsible for what? What can you hold them responsible for and what do you have to pay for? It's good to know in advance.

Basically, you could say that:

- Microsoft is responsible for making Business Central work - but not necessarily your customized version, and not necessarily well in terms of your business processes and your benefit from the solution.
- The supplier is responsible for what you have specifically agreed that they are responsible for. If you haven't specifically agreed on anything, they only have general product liability for the work they've done.

We need to elaborate on that.

For example, you can't expect your supplier to proactively respond to an error in your environment - unless you have agreed with your supplier that they have that task.

You might think that if you have a subscription with Microsoft, they must also monitor that the solution works all the time. But Microsoft only monitors that the server is running, that the solution is running on the server and that your environments are accessible. They don't keep an eye out for conflicts or errors, or whether your data is being corrupted.

Your ERP vendor is a kind of link between you and Microsoft. Traditionally, ERP vendors have been quite reactive, but fortunately that's changing now.

More and more ERP vendors are offering proactive services and monitoring, and that's because it's important when using the Cloud.

## Who will you ask what?

You probably can't expect your everyday "in-house consultant" to know all of Microsoft's future plans. They focus on what the solution can do today.

If you were used to your "in-house consultant" being able to answer everything, you should know that it's impossible to be an all-knowing consultant today. You know the joke that for a carpenter, every challenge looks like a nail? The same applies if your in-house consultant has specialized in programming in Business Central for decades.

But you can ask if they have colleagues who are tasked with staying up to date on Microsoft's development plans.

The role of consultants has changed in recent years. If you've been using ERP for many years, not just Business Central but maybe even back when it was called Dynamics NAV or Navision, then you've seen the role of consultants change.

In the old days, a consultant could know the entire solution, but today the solution is far too comprehensive. There is no consultant who knows every corner of Business Central. As a customer, you also expect deep expertise when you ask a specific question, which is why you need to staff a project with a group of experts covering the important subject areas - plus some generalists to ensure coherence.

On ERP projects, you need more consultants from the supplier because more different skills are needed than ever before, which also creates a greater demand for project management.

With the Cloud edition of Business Central, the picture becomes even more complex because you also use apps from multiple vendors and you build functionality and processes with Microsoft Power Platform. The IT landscape around Business Central is becoming more complex all the time.

### As an ERP administrator today, you need to be aware of who you ask for what.

The depth has become deeper and the breadth has become wider. As an ERP supplier, we have to say that if we are asked to provide experts in all areas of an ERP project, there will be many project participants, and if we want to reduce the number of project participants, some areas will naturally be handled by generalists instead of specialists.

There is no correct choice. As an ERP administrator, you need to select what type of complexity you can best handle.

For example, let's say you regularly have a generalist consultant who can help you in many areas. Now you would like to change the configuration of the procurement process, which your generalist consultant is not an expert in.

Would you prefer them to spend a few hours figuring it out because it's important that your regular consultant knows your business, or would you rather have a specialist consultant you've never met before advise you on the configuration changes in half an hour? This is what a choice can look like in practice.

## Dependence

If you use one consultant for all tasks, you risk becoming dependent on them because another consultant will find it difficult to take over the task. If you use specialists for all tasks, you need to invest in creating an overview and maintaining consistency.

As the ERP administrator you need to make sure you maintain control over your solution.

Today, you can switch vendors whenever you like. And Microsoft has made it possible for you to choose exactly who has access to your license, so you're not tied to the vendor registered as the license owner with Microsoft.

It's important that you stay in control over your own solution so you are free to switch consultants. You need to consider how much you want to do yourself, and if it's not something you can do yourself, then you need to consider how to get help from a consultant without creating dependency.

## Take control

### You need to take control of your ERP solution. As an ERP manager, you need to choose who you want to depend on.

If you want to add functionality, look for an app on AppSource first, and alternatively have the functionality developed. This provides the least dependency.

If you use an app, you are of course dependent on the app vendor, but if you make sure to choose apps that are popular and widely used, then you don't have to hold the vendor responsible for the app yourself. There are many other customers who will help test and report bugs and improvement requests to the manufacturer. And if you choose apps that are known by many ERP vendors in the market, it's also easier to switch ERP vendor if you want to.

If you have functionality developed by your ERP supplier, you become quite dependent on that supplier - and actually also on the specific developer who did the development. You may think that other developers can easily get to know the code, but it's often very expensive to have a developer take over another developers' code.

With this book, you have hopefully learned more about your role as an ERP manager and gained a lot of inspiration.

It has become easier to find information about Business Central. On the web, you can easily find information about new versions and help on how to use the solution.

We also hope that we at Abakion can contribute. We share our knowledge on usedynamics.com with lots of instructional videos.

And we also do what we can to provide the proactive services that are essential for an ERP manager with Business Central.

Write to us at abakion@abakion.com if you have any questions.

We would love to help you.

Thank you for your time.

abakion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