

SL Overlay for Business Central

The SL Overlay is the result of working with users to add features based on Microsoft Dynamics SL functionality that add value to all users of Microsoft Dynamics 365 Business Central, not just Dynamics SL users.

Two scheduled releases:

- > Fall 2020
- > Spring 2021



SL Overlay Fall 2020 release

What's included



Recurring Journal - Reversing Journal

• Set the date of the Reversing Journal for Recurring Journals



Warning Messages

 Adding 25 additional warning messages for data missing from key fields



Shortcut Dimensions 3-8

 Adding Shortcut Dimensions to Financial setup and data entry screens



ReversingJournal



Dynamics 365 BC Recurring Journals feature creates a reversing entry set to **post the next day.**



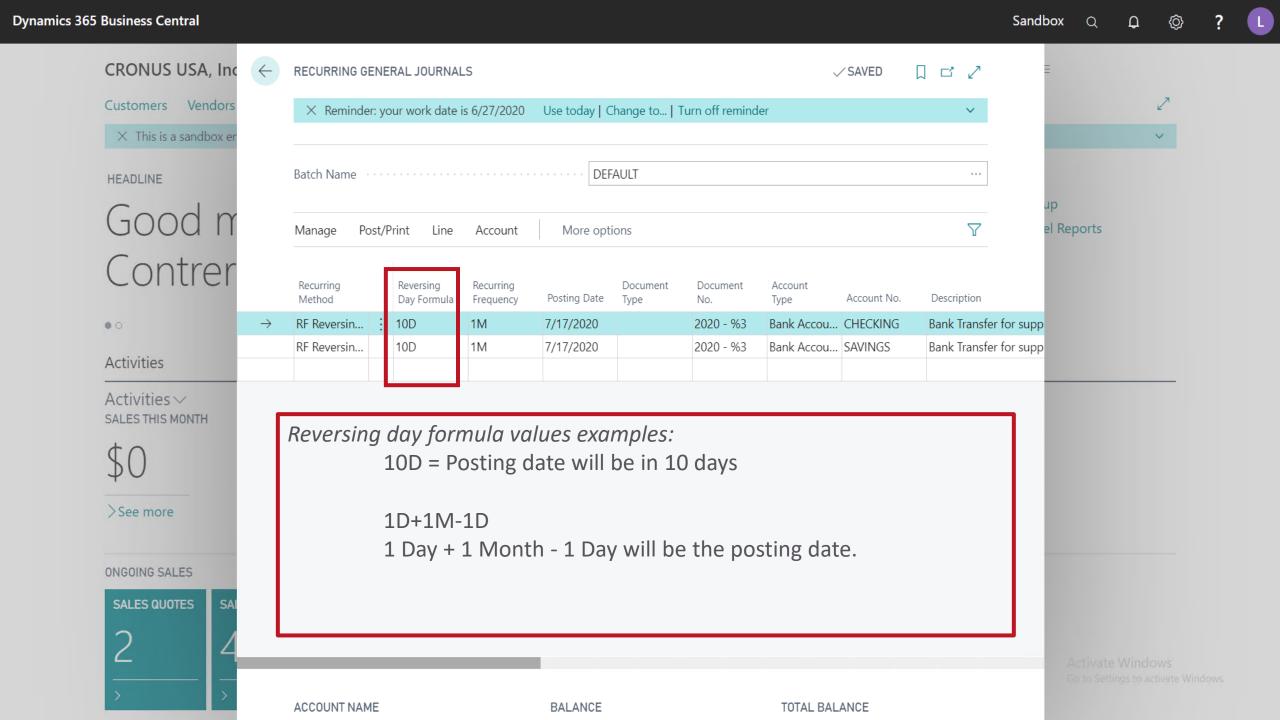
Microsoft Dynamics SL users are used to entering recurring journals where the reversing entry posts to the **next period/month.**



The SL Overlay adds the ability to set when a reversing entry happens:

- New Reversing Day Formula field added to screen
- Set reversing date to any date





Warning Messages



Dynamics 365 Business Central automatically saves data being entered



Dynamics 365 Business Central's **My Notifications** screen is used to manage warning messages to remind users when entering data



Microsoft Dynamics SL users are used to being **warned** if any "key" fields are **not populated**



The SL Overlay

 Adds 25 warning messages to Dynamics 365 Business Central financial screens to assist entering data using the My Notifications screen



Warning messages can be **turned on or off** for each user



warn about

Sandbox Q







7 ≣





MY NOTIFICATIONS | WORK DATE: 6/30/2020

Open in Excel

🐯 Edit List

| | Notification | Enabled | Conditions | |
|---------------|---|----------|------------------------|----------------------------------|
| \rightarrow | Warn about invalid code (Employee) | ✓ | (View filter details) | |
| | Warn about missing values in Number Series (FA) | ✓ | (View filter details) | |
| | Warn about missing Tax Area Code (AP) | ✓ | (View filter details) | |
| | Warn about missing Bank Account Nos. | ✓ | (View filter details) | |
| | Warn about missing Payment Terms Code | ✓ | (View filter details) | |
| | Warn about missing Gen. Bus. Posting Group (AP) | ✓ | (View filter details) | |
| | Warn about missing Employee Nos | ✓ | (View filter details) | |
| | Warn about missing Vendor Posting Group | ✓ | (View filter details) | |
| | Warn about missing values in Number Series (AP) | ✓ | (View filter details) | |
| | Warn about missing values in Numbering (JOB) | ✓ | (View filter details) | |
| | Warn about unreleased orders. | ✓ | _ | |
| | Warn about unposted documents. | ✓ | Document Type: Invoice | |
| | Warn about missing Reminder Terms Code | ✓ | (View filter details) | |
| | Warn about missing fields prior to exiting screen (TAX) | ✓ | (View filter details) | |
| | Warn about missing Deposit Nos. | | (View filter details) | |
| | Warn about missing values in Number Series (AR) | ✓ | (View filter details) | |
| | Warn about missing FA Subclass Code | ✓ | (View filter details) | |
| | Warn about missing Gen. Bus. Posting Group (AR) | ✓ | (View filter details) | |
| | Warn about invalid code (1099) | ✓ | (View filter details) | |
| | Warn about missing Customer Posting Group | ✓ | (View filter details) | |
| | Warn about missing values in Numbering (IN) | ✓ | (View filter details) | Activate Windows |
| | Warn about invalid Name | ✓ | (View filter details) | Go to Settings to activate Windo |
| | Warn about missing fields in Gen. Posting Setup | ✓ | (View filter details) | |
| | Warn about missing Tax Area Code (AR) | ✓ | (View filter details) | |

List of all Warning message

Notification Notification

| 1. Warn about missing Bank Account Nos. | 15. Warn about missing values in Number Series (FA) |
|---|---|
| 2. Warn about missing Deposit Nos. | 16. Warn about missing FA Subclass Code |
| 3. Warn about missing values in Number Series (AR) | 17. Warn about missing Employee Nos |
| 4. Warn about missing Tax Area Code (AR) | 18. Warn about missing fields prior to exiting screen (FA) |
| 5. Warn about missing Gen. Bus. Posting Group (AR) | 19. Warn about missing values in Default and Numbering |
| 6. Warn about missing Customer Posting Group | 20. Warn about invalid Name |
| 8. Warn about missing values in Number Series (AP) | 21. Warn about missing Reminder Terms Code |
| 9. Warn about missing Tax Area Code (AP) | 22. Warn about missing values in Numbering (IN) |
| 10. Warn about missing Gen. Bus. Posting Group (AP) | 23. Warn about missing values in Numbering (JOB) |
| 11. Warn about missing Vendor Posting Group | 24. Warn about missing fields prior to exiting screen (TAX) |
| 12. Warn about invalid account category | 25. Warn about missing fields in Gen. Posting Setup |
| 13. Warn about invalid code (1099) | |
| | |



Adding Shortcut Dimensions 3-8



Dynamics 365 Business Central **dimensions** are similar in concept to the Dynamics SL **subaccount** segments



Dynamics 365 Business Central includes up to 8 dimensions



Dimension 1-2 are global dimensions available on all screens

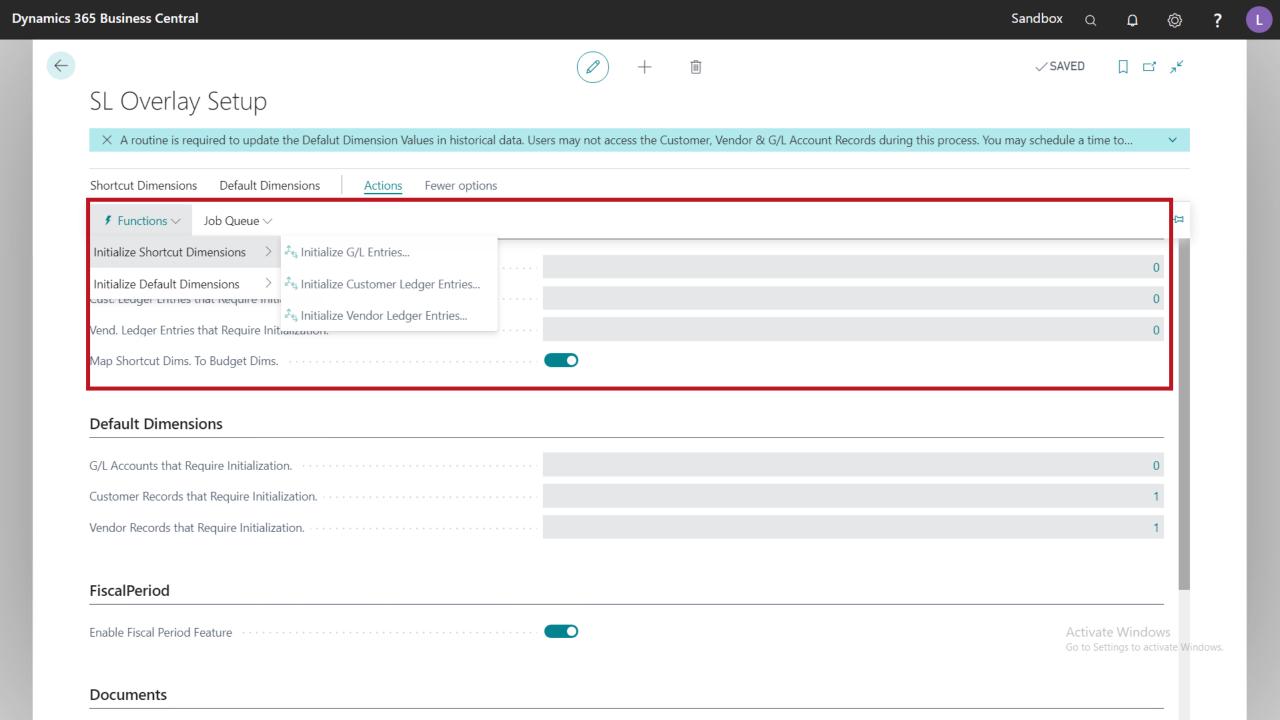


Dimension 3-8 are only available in Dynamics 365 Business Central by drilling down to other screens to view or enter data



The SL Overlay

- Adds shortcut dimension 3-8 to financial maintenance and data entry screens
- Allows filtering on ledger entries and reports on dimensions 3-8













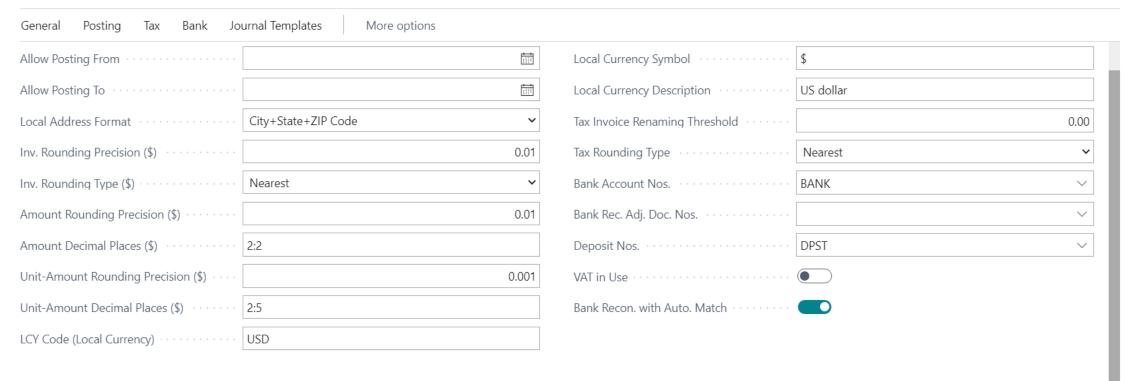


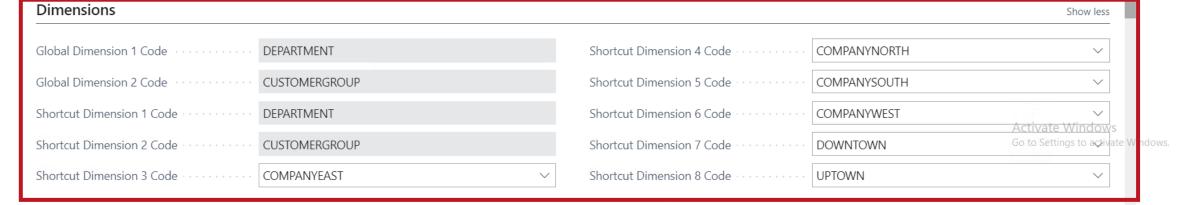


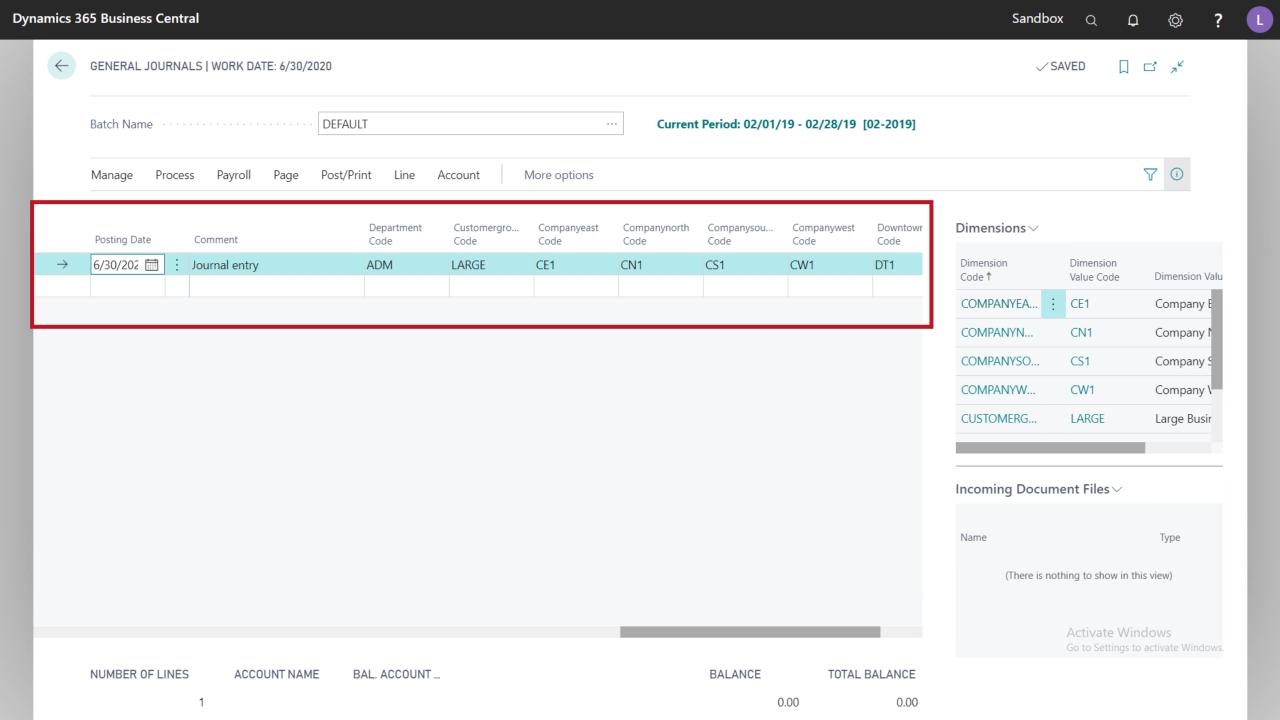














1,000.80

0.00

Total Excl. Tax (USD)

Total Tax (USD)

1,000.80

Go to Settings to activate Windows.

1,000.80

Activate Windows

Subtotal Excl. Tax (USD)

Inv. Discount Amount Excl. Tax (USD)

Invoice Discount %

SL Overlay Spring 2021 Release



Changing terminology



10 new SL based reports



Batch processing



GL Register page enhancements



Period fields



New graphic menu using SL menu layout



SL Overlay Spring 2021 Release



Changing terminology

• Adding SL screen names to BC screens



10 new SL based reports

• Example adding dimensions 3-8 in financial reporting



Batch processing

- Adding Created By field and filtering
- See only the items you have entered (purchase & sales documents)
- Release multiple purchase or sales documents at a time



SL Overlay Spring 2021 Release



GL Register page enhancements

- Added Created By User field for filtering
- Links added to Customer and Vendor list pages to access related ledger entries
- Print and Post batch from Document List
- Added "Control Total" field to Purchase and Sale Invoice pages
 - Enter total and set whether to allow release if detail lines do not equal total
- Adding budgeting by periods 3-6



Period fields

- Display Accounting Period on screen
- Close periods and automatically set date range based on period value
- Use period fields to filter custom SL based reports



New Graphic menu using SL menu layout (desktop and portable)

- Financial menu
- Editable menu system



Ready to learn more about the SL Overlay?



Contact Velosio at 888.725.2555



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