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
Shortcut	Function
Alt+F7	Sort column in asc/desc order
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
Tip	Explanation
Search	Search looks at visible columns and it is not case-sensitive
Filtering	Filtering looks at all fields and it is case sensitive
Saving filters	Filters can be permanently saved as a view and can include expressions such as ranges
Filter tokens	e.g. %mycustomers looks for customers in the My Customers page on your Role Center
Calculated data tokens	You can use expressions to add/subtract days/weeks/month/years (e.g. -1Y means a year ago)
Combined format expressions	You can combine these filter characters (e.g. 5599|8100..8490 includes any records with the number 5599 or a number from the interval 8100 through 8490)

Filtering can be adjusted by using powerful filter characters	Interval: E.g. 22..24 looks for the dates from the 22nd to the 24th of the current calendar month; P8.. looks for information for accounting period 8 and thereafter
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	An exact character match E.g. 'man' looks for an exact character match
	Not equal to: E.g. <>0 looks for all numbers except 0
	Case-insensitive: E.g. @man looks for text that matches man and is not case-sensitive
	Indefinite unknown characters: E.g. *Co* looks for text that contains ''Co'' and is case-sensitive
	One unknown character: E.g. Hans?n looks for text such as Hansen or Hanson

Entering Data – Keyboard shortcuts

Shortcut	Function
F8	Copy from the cell above
Enter/Shift+Enter	Go to next/previous Quick Entry field
Ctrl+Shift+Enter	Go to next Quick Entry field outside a list
Ctrl+Insert	Insert a new line in documents
Ctrl+Delete	Delete the line in documents, journals, and worksheets
Ctrl+Shift+F12	(⊡) Toggle Focus Mode
F6	Move to the next FastTab or part
Shift+F6	Move to the previous FastTab or part (sub-page)
Alt+F6	Toggle collapse/expand for the current field group (FactBox)

Tips and Tricks for Entering Data

Tip	Explanation
Autosaving	Data is automatically saved and the autosave indicator shows the state of the card
Quick Entry	Quick Entry allows you to use the Enter key to navigate through only those fields that you need. Select personalize (⚙) to change this.
Columns can be resized	Double-click to AutoFit
There are various ways to enter dates, times, and duration	"w" & "t" "w" specifies the work date and "t" the today's date Other examples are "tu" which stands for Tuesday and P1 for the first accounting period
Focus Mode (⊡)	.;: For a better view of document lines, use focus mode. This will maximize the line items part on a document page.
Calculator in numeric fields	You can enter a formula instead of the sum quantity.. E.g. If you enter 19+19, the field is calculated to 38.

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Finding Pages and Information with Tell Me

When you need help to find something, use the 🔍 Search icon to search for it. You can also use ALT+Q to start a search.

When you start typing characters on the Tell me what you want to do page, Business Central immediately displays matches. Results in the list change as you type more characters. If you notice that when you enter the word product and the results include items, that's because search uses synonyms and alternate search terms to make it easier to find actions, pages, and reports.

The column to the right indicates the general category of the result. For example, whether it will open a list page or is an administrative task.

At the bottom of the Tell me what you want to do page, the exploring pages and reports action opens a feature overview that shows you all available features for your role or for all roles.

> Tip: If you prefer to use your keyboard, use the Tab key and Arrow keys to choose an item in the results. If you select the Enter key on your keyboard without choosing a result, Business Central opens the result that is listed first.

The Tell me what you want to do page categorizes results based on the data that you enter and the page you're working on. The following sections describe the categories.

Find an action on the current page

The On current page section lets you find actions on the page you have open. For example, if the Sales Quote page is open and you type "customer," the section includes an action that opens the Customer Card page for the customer chosen on the sales quote.

Note: The list includes only actions that are available on the navigation bar at the top of the page. Actions on FastTabs are not included.

Find a page or a task

The results in the Go to Pages and Tasks section provide access to other pages and let you perform tasks or look up information. If you use these pages often, you can choose the bookmark icon to add a link to any page onto your Role Center.

The pages and tasks that are listed depend on the user experience you chose for your company. The Essential experience gives access to fewer pages and tasks than the Premium experience does. The first time you sign in, you use the Essential experience.

Find a report or archived information

The Go to Reports and Analysis section offers access to reporting tools. For example, you can open the Balance Sheet report from the list, or access archived documents and other information.

Find a record or search the documentation

The Search for <keyword> section Business Central offers a couple of ways to search:

- Use the Search company data action to search all pages in Business Central.

- Use the Search Help action to find an article in the Business Central documentation that contains your keyword.

Note: Your search results won't include documentation for third-party extensions.

Use Search in company data

Use the Search in company data screen to search for data across Business Central. For example, you can find a customer by entering their name or address, or even find a specific record, such as a sales order. You can also use it to find information in our documentation. Just enter at least three characters of a keyword in the Search in company data screen.

Note: For data, searching everything in Business Central might take time. To speed up results, use the Show tables to search action in the Results section to choose the tables and fields that you want to include in your searches. The tables and fields that you can choose from vary, depending on your Role Center. By default, all tables and fields are chosen, which can slow down the search. We recommend that you exclude as many tables and fields as you can.

After you enter your keywords, Business Central starts your search in the background and goes through each table one at a time. Search results begin to appear after it finished each table. If you enter more than one keyword, the results will include only records that have all of the words in any of the selected fields.

The results page shows the three most recently updated records. If there are more than three, you can choose Show all results to display them.

Each time you choose a search result you increase the popularity of the table, and it will appear higher in the results. Additionally, the record will be found more quickly if you search for it in the future.

Note: Headers on sales, purchase, and service documents actually represent different document types, such as quotes, invoices, and orders. Headers are treated as if they were tables. If your keyword was found in a line on one of these documents, when you choose the search result the page for the document displays, and not just the line.

Use Search on list pages

It isn't related to Tell me what you want to do, but there's another way to search for specific data. When you're using a list page, you can use the 🔍 Search field in the left corner of list page headers to search for data on the page. The search applies only to the list you're viewing.

Tip: You can search for posted document lines, such as invoice lines, credit memo lines, shipment lines, and receipt lines. Search for the type of document lines that you want to find, and then bookmark the links to the documents on your home page for easy access to the original or a filtered view.

Finding Pages with the Role Explorer

You can get an overview of all the business features that are available for your role, and for other roles if you go a step further. In the following section, this feature overview is referred to as the role explorer.

Each element on the role explorer is an action that opens a page. Accordingly, you can also use the role explorer as a means to navigate in Business Central.

Open the role explorer

You can open the role explorer from the Role Center and all list pages and from the Tell Me window.

- On your Role Center or any list page, choose the ≡ button to the right of the navigation bar, or select Shift+F12.
- In the Tell Me window, choose the exploring action at the bottom.

When you first open the role center, it shows links to most features available for your role.

Navigate features

The actions that open pages are organized under nodes named after the features or application areas. Each node can be collapsed or expanded individually and you can collapse/expand all nodes together.

- To expand/collapse an individual node, choose the node. This applies to top-level nodes and sub nodes.
- To expand/collapse all top-level nodes on the page, but leave the sub-nodes as they are, choose ... at the top, then choose Expand or Collapse.
- To expand/collapse all top-levels node and all sub nodes under it, choose ... at the top, then choose the Expand All or Collapse All action.

Search for features

To quickly locate features, select Find, then enter a word or phrase for the feature your trying to find. The role center will highlight any matching text. If a feature is hidden from view in collapsed node, the collapsed node is marked with a dot.

Explore other roles

To explore roles other than your own, select Explore more roles. The role center displays each role under its own heading, with links to its features. You can then navigate and find features just like you do when exploring your role.

Note: You'll only see roles that are set up to show in the role explorer. So if you don't see a role that you expected to see, it's probably not set up for it.

When exploring other roles, you can also narrow the exploration down by using the Report & Analysis and Administration actions at the top of the role center.

- Report & Analysis shows only those features that are categorized as reports and analysis features.
- Administration shows only those features that are categorized as administration features.

Expand and collapse nodes on the role explorer

The actions that open pages are organized under nodes named after the features or application areas. Each node can be collapsed or expanded individually and you can collapse/expand all nodes together.

- To expand/collapse a node, choose the node. This applies to top-level nodes and sub nodes.
- To expand/collapse all top-level nodes on the page, choose the Expand or Collapse action in the top-right corner.
- To expand/collapse all top-levels node and all sub nodes under it, do one of the following steps:

- o   Select the Ctrl+Shift keys while you choose the Expand or Collapse action in the top-right corner.
- o   Choose ... in the top-right corner, then choose the Expand All or Collapse All action.

Sorting, Searching, and Filtering

Sorting

Sorting makes it easy for you to get a quick overview of your data. For example, if you have many customers, you could sort them by Customer No., Currency Code, or Country Region Code to get the overview you need.

To sort a list, you can either:

- Choose a column heading text to toggle between ascending and descending order, or
- Choose the drop-down arrow in the column heading, then choose the Ascending or Descending action.

Note: Sorting isn't supported on images, BLOB fields, FlowFilters, and fields that do not belong to a table.

Searching

At the top of each list page, there's a 🔍 Search action that provides a quick and easy way to reduce the records in a list and display only those records that contain the data that you're interested in seeing.

To search, just choose the Search action, and then in the box, type the text that you're looking for. You can enter letters, numbers, and other symbols.

In general, search will attempt to match text across all fields. It doesn't distinguish between uppercase and lowercase characters (case insensitive) and will match text placed anywhere in the field, at the beginning, end, or in the middle.

Note: Search won't match values in images, BLOB fields, FlowFilters, FlowFields, and other fields that aren't part of a table.

Fine-tuning the Search with Filter criteria

You can make a more exact search by using filter operators, expressions, and filter tokens. Unlike filtering, these are applied across all fields when used in the search box, making them less efficient than filtering.

- To find only field values that match the entire text and case exactly, place the search text between single quotes '' (for example, 'man').
- To find field values that start with a certain text and match the case, place * after the search text (for example man*).
- To find field values that end with a certain text and match the case, place * before the search text (for example *man).
- When using '' or *, the search is case-sensitive. If you want to make the search case insensitive, place @ before the search text (for example @man*).

The following table provides some examples to explain how you can use the search.

Search Criteria	Finds...
man or Man	All records with fields that contain the text man, regardless of the case. For example, Manchester, manual, or Sportsman.
'Man'	All records with fields that contain only Man, matching the case.
Man*	All records with fields that start with the text Man, matching the case. For example, Manchester but not manual or Sportsman.
@Man*	All records with fields that start with man, regardless of the case. For example, Manchester and manual, but not Sportsman.
@*man	All records that end with man, regardless of the case. For example Sportsman, but not Manchester or manual.

Filtering

Filtering provides a more advanced and versatile way to control which records are included in a list, report, or XMLport. There are two major differences between searching and filtering, as described in the table below.

	Searching	Filtering
Applicable Fields	Searches across all fields that are visible on the page.	Filters one or more fields individually, selecting from any field on the table, including fields that aren't visible on the page.
Matching	Displays records with fields that match the search text, no matter the text's case or placement in the field.	Displays records where the field exactly matches the filter, including the text's case, unless special filter symbols are entered.

Filtering enables you to display records for specific accounts or customers, dates, amounts, and other information by specifying filter criteria. Only records that match the criteria are displayed on the list or included in the report, batch job, or XMLport. If you specify criteria for multiple fields, then only records that match all criteria will be displayed.

For lists, the filters are displayed on a filter pane that appears to the left of the list when you activate it. For reports, batch jobs, and XMLports, the filters are visible directly on the request page.

Filtering with Option Fields

For "ordinary" fields that hold data, setup date, or business data, you can set filters both by selecting data and by typing filter values, and you can use symbols to define advanced filter criteria.

For fields of type Option, however, you can only set a filter by selecting one or more options from a drop-down list of the available options. An example of an option field is the Status field on the Sales Orders page.

Note: When you select multiple options as a filter value, the relationship between the options is defined as OR. For example, if you select both the Open and the Released check box in the Status filter field on the Sales Orders page, it means that sales orders that are either open or released are displayed.

Setting Filters on Lists

On lists, you set filters by using the filter pane. To display the filter pane for a list, choose the drop-down arrow next to the name of the page, and then choose the Show filter pane action. Alternatively, select Shift+F3.

To display the filter pane for a column on a list, choose the drop-down arrow, and then choose the Filter action. Alternatively, select Shift+F3. The filter pane opens with the selected column shown as a filter field in the Filter list by section.

The filter pane displays the current filters for a list, and enables you to set your own custom filters on one or more fields by choosing the + Filter action.

A filter pane is divided in three sections: Views, Filter list by, and Filter totals by:

- Views: Some lists include the Views section. Views are variations of the list that have been preconfigured with filters. You can define and save as many views as you want per list. The views will be available to you on any device you sign into.
- Filter list by: This section is where you add filters on specific fields to reduce the number of displayed records. To add a filter, choose the + Filter action. Then, type the name of the field that you want to filter the list by or pick a field from the drop-down list.
- Filter totals by: Some lists that display calculated fields, such as amounts and quantities, will include the Filter totals by section where you can adjust various dimensions that influence calculations. To add a filter, choose the + Filter action. Then, type the name of the field that you want to filter the list by or pick a field from the drop-down list.

You can set a simple filter directly on a list within using the filter pane, namely a filter that displays only records with the same value as in the selected cell. Select a cell on the list, choose the drop-down arrow, and then choose the Filter to This Value action. Alternatively, select Alt+F3.

Setting Filters in Reports, Batch Jobs, and XMLports

For reports and XMLports, the filters are visible directly on the request page. The request page displays the last used filters according to your selection in the Use default values from field.

The main Filter section shows the default filter fields that you use to delimit which records to include in the report or XMLport. To add a filter, choose the + Filter action. Then, type the name of the field that you want to filter by, or pick a field from the drop-down list.

In the Filter totals by section, you can adjust various dimensions that influence calculations in the report or XMLport. To add a filter, choose the + Filter action. Then, type the name of the field that you want to filter by, or pick a field from the drop-down list.

Entering Filter Criteria

Both in the filter pane and on a request page, you enter your filter criteria in the box under the filter field.

The type of the filter field determines which criteria you can enter. For example, filtering a field that has fixed values will only let you choose from those values.

Columns that already have filters are indicated by the ▼ icon in the column heading. To remove a filter, choose the drop-down arrow, and then choose the Clear Filter action.

Tip: Accelerate finding and analyzing your data by using combinations of keyboard shortcuts. For example, select a field, use Shift+Alt+F3 to add that field to the filter pane, type the filter criteria, use Ctrl+Enter to return to the rows, select another field, and use Alt+F3 to filter to that value.

Filter Criteria and Operators

When you enter criteria, you can use all the numbers and letters that you normally use in the field. But there's also a set of special symbols that you can use as operators to further filter the results. The following sections describe these symbols and how to use them as operators in filters.

Tip: For more information about filtering dates and times, see Work with Calendar Dates and Times.

Important: There may be situations where the value that you want to filter on contains a symbol that's an operator. For more information about handling these situations, see Filtering on Values That Contain Symbols for more instructions about handling this situation.

If there are more than 200 operators in a single filter, the system will automatically group some expressions in parentheses () for the purpose of processing. This has no effect on the filter or the results.

(..) Interval

Sample Expression	Records Displayed
1100..2100	Numbers 1100 through 2100
..2500	Up to and including 2500
..12 31 00	Dates up to and including 12 31 00
P8..	Information for accounting period 8 and after
..23	From the beginning date until 23-current month-current year 23:59:59
23..	From 23-current month-current year 0:00:00 until the end of time
22..23	From 22-current month-current year 0:00:00 until 23-current month-current year 23:59:59

Tip: If you're using a numeric keypad, the decimal separator key may output a character other than a period (.). To switch to a period, select the Alt+Decimal Separator keys on the numeric keypad. When you want to switch back, select Alt+Decimal Separator again.

(|) Either/or

Sample Expression	Records Displayed
1200|1300	Numbers with 1200 or 1300

(<>) Not equal to

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Sample Expression	Records Displayed
<>0	All numbers except 0 The SQL Server Option allows you to combine this symbol with a wild-card expression. For example, <>A* meaning not equal to any text that starts with A.

(>) Greater than

Sample Expression	Records Displayed
>1200	Numbers greater than 1200

(>=) Greater than or equal to

Sample Expression	Records Displayed
>=1200	Numbers greater than or equal to 1200

(<) Less than

Sample Expression	Records Displayed
<1200	Numbers less than 1200

(<=) Less than or equal to

Sample Expression	Records Displayed
<=1200	Numbers less than or equal to 1200

(&) And

Sample Expression	Records Displayed
>200&<1200	Numbers greater than 200 and less than 1200

('') An exact character match

Sample Expression	Records Displayed
'man'	Text that matches man exactly and is case-sensitive.
''	Text that is empty.

(@) Case insensitive

Sample Expression	Records Displayed
@man*	Text that starts with man and is case insensitive.

(*) An indefinite number of unknown characters

Sample Expression	Records Displayed
Co	Text that contains Co and is case-sensitive.
*Co	Text that ends with Co'' and is case-sensitive.
Co*	Text that begins with Co and is case-sensitive.

(?) One unknown character

Sample Expression	Records Displayed
Hans?n	Text such as Hansen or Hanson

Combined Format Expressions

Sample Expression	Records Displayed
5999|8100..8490	Include any records with the number 5999 or a number from the interval 8100 through 8490.
..1299|1400..	Include records with a number less than or equal to 1299 or a number equal to 1400 or greater (all numbers except 1300 through 1399).
>50&<100	Include records with numbers that are greater than 50 and less than 100 (numbers 51 through 99).

Filtering on Values That Contain Symbols

There may be cases where field values contain the one of the following symbols:

- &
- (
-)
- =
- |

If you want to filter on any of these symbols, place the filter expression in single quotes ('<expression with symbol>'). For example, if you wanted to filter on records that start with the text J & V, the filter expression would be 'J & V*'.

This requirement isn't necessary for other symbols.

Filter Tokens

When entering filter criteria, you can also type words that have special meaning, called filter tokens. After entering the token word, the word is replaced by the value or values that it represents. Filter tokens make filtering easier by reducing the need to navigate to other pages to look up values you want to add to your filter. The tables below describe some of the tokens you can type as filter criteria.

(%me or %userid) Records Assigned to You

Use %me or %userid when filtering fields that contain the user ID, such as Assigned to User ID field, to display all records that are assigned to you.

Sample Expression	Records Displayed
%me or %userid	Records that are assigned to your user account.

(%mycustomers) Customers in My Customers

Use %mycustomers in the customer No field to display all records for customers that are included in the My Customers list on your Role Center.

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Sample Expression	Records Displayed
%mycustomers	Customers in the My Customers on your Role Center.

(%myitems) Items in My Items

Use %myitems in the item No field to display all records for items that are included in the My Items list on your Role Center.

Sample Expression	Records Displayed
%myitems	Items in the My Items on your Role Center.

(%myvendors) Vendors in My Vendors

Use %myvendors in the vendor No field to display all records for vendors that are included in the My Vendors list on your Role Center.

Sample Expression	Records Displayed
%myvendors	Vendors in the My Vendors on your Role Center.

Entering Data

Work with editable fields

Fields in Business Central may contain different editable data, such as text or currency amounts. Editable fields typically display an input box where you can type or choose a value. Non-editable fields are typically displayed with a gray background.

Some editable fields provide a picker to help you specify a value.

Picker	How it helps you specify a value
Date picker	This picker displays a calendar that is based on your current regional settings. It helps you choose a single date.
Dropdown	Dropdowns provide a choice of fixed values or reference records from another table
Switch or Checkbox	Some fields provide a simple choice of Yes or No values. The switch is used to specify this value, and is always displayed as a checkbox in lists
Assist edit	Some fields provide custom pickers that are suited to looking up and choosing the best value for that field, such as popup window

Modifying a field value

To modify the value of a field, you must first set focus to that field. You set focus by doing the following actions:

- Use the Tab key. The action selects the entire value.
- Left-click your mouse or similar input device. This action will only select the entire field value if the field is in a list.

When you interact with fields in the user interface, Business Central typically favors selecting the entire field value to make it easier for you to replace that value.

When the entire field value is selected:

- Replace the value by just typing to specify a new value. If the field offers a picker, you can activate it using the Alt+Down Arrow keyboard shortcut.
- Use the Delete or Backspace key to clear the value.

select the F2 key to toggle between selecting the entire field value or placing the cursor after the field's value. Placing the cursor at the end of the value makes it easier for you to append to the existing value.

When the cursor is shown at the end of the field value:

- Add to the value by just typing.
- Use the Home, End, Left Arrow, and Right Arrow keys to move the cursor within the value. If you're editing a field in a list, selecting the Left Arrow key again when the cursor is at the beginning of the value will set focus to the previous field. Similarly, selecting the Right Arrow key again when the cursor is at the end of the value will set focus to the next field.

Note: After you specify a value, Business Central will only check that it's valid after you click outside the field or set focus to another element, such as the next field.

Check data in documents and journals while you work

In 2022 release wave 1 we introduced a feature that will validate the data you enter in documents and journals while you're entering it. For example, turning on this feature can help avoid mistakes in data entry or not being able to post something due to an error.

Your administrator can enable the Feature: Check documents and journals while you work feature on the Feature Management page. Afterward, you will receive a notification when you open a page to start working on a document or journal. To start using the feature, choose the Enable this for me link in the notification.

If you enable the feature, the FactBox Pane will show either a Check Document or Check Journal FactBox, depending on the type of document you're working on. The FactBox lists the errors on the page so you can quickly resolve them.

If you decide you don't need the feature, there are two ways to turn it off:

- For journals, turn off the Enable Data Check toggle on the General Journal Setup page.
- For documents, clear the Show the Document Check FactBox check box on the My Notifications page.

Keyboard Shortcuts

There are several keyboard shortcuts that let you work "mouse-free" and speed up your data entry. These keyboard shortcuts are especially useful with large-scale entries and repetitive typing tasks.

For more information about shortcuts, see Keyboard Shortcuts. A few of the keyboard shortcuts are discussed in this article.

Accelerating Data Entry Using Quick Entry

Quick Entry is a feature designed for data entry when using the keyboard. Quick Entry works on fields (like on card pages) and in lists (rows and columns). It's beneficial when doing repetitive typing tasks that require creating multiple records in sequence. Examples include a batch of sales orders or registering new items.

You can use the Tab key to navigate from one field on a page to the next editable field. A disadvantage of using Tab is that it always goes sequentially to the next field. Quick Entry lets you change this path. With Quick Entry, you use the Enter key to navigate through only those fields that you're interested in. Quick Entry skips non-editable fields and fields that you typically don't fill in. You might have already noticed this behavior on some pages. This behavior is because the fields to include when pressing Enter and which ones to skip have been predefined. You can customize Quick Entry by personalizing your workspace and optimizing how you enter data on each page.

How Quick Entry Works

Every field can be marked as either included in Quick Entry or excluded from Quick Entry. Fields that are included in Quick Entry will be included in the path when you select Enter. Fields that are excluded from Quick Entry won't.

When you're finished entering data in a field, you simply select Enter to confirm the changes and go to the next field. If you want to reverse direction, and go the previous field, select Shift+Enter. For more information about shortcuts, see Quick Entry Shortcuts for Fields.

Tips and Tricks

- The following list provides some useful information about using Quick Entry.
- It's available for any editable fields.
- It also works across columns and rows.
- It doesn't prevent accessing other elements of a page, such as actions. These elements are still accessible by using Tab and Shift+Tab.
- It's not required that FastTabs are expanded for Quick Entry to work. If the next Quick Entry field is located in a collapsed FastTab, that FastTab will automatically expand and focus on the chosen field. Business Central will remember that the FastTab should be expanded next time you visit the page.
- Quick Entry works no matter whether fields are mandatory. So it's a good idea to ensure that mandatory fields are included in Quick Entry.
- By default, most fields are automatically included in Quick Entry. So initially your task will most likely be excluding fields from Quick Entry.

To change Quick Entry fields

To set up Quick Entry on fields, you use personalization.

Start personalization by selecting the ⚙ icon, and then the Personalize action.

Select a field that you want change. In lists, select the corresponding column heading. Then, choose either Include in Quick Entry or Exclude from Quick Entry.

Mandatory Fields

When you enter data on pages, certain fields are marked with a red asterisk. The red asterisk means that the field must be filled to complete a certain process. An example is when you post a transaction that uses the value in the field.

Although a field is mandatory, you aren't forced to fill the field before you continue to other fields or close the page. The red asterisk only serves as a reminder that you'll be blocked from completing a certain process.

Finding Data As You Type

When you start to type characters in a field, a drop-down list is displayed and shows possible field values. The list changes as you type more characters, and you can select the correct value when it's displayed.

Many fields have a down arrow button that you can choose. You choose the arrow to get a list of data that is available to enter in the field. The button has two functions depending on the type of field:

- Lookup - Displays information from another table that you can enter in the field. You can select one piece of data at a time.
- Drop-down - Displays the set of options that exist for the field. You can select only one of the options.

Copying and Pasting FAQ Fields and Lines

You can copy one or more rows from a list or a single field on a page. Then paste what you copied into the same page, another page, or an external document. You could, for example, paste to Microsoft Excel or Outlook email. In short, to copy, select Ctrl+C (cmd+C in macOS) on your keyboard. To paste, select Ctrl+V or cmd+V in macOS.

In a list, to copy the field in the same column of the row above, and paste it into the current row, just select F8.

For more information, see Copying and Pasting FAQ.

Filtering Line Items

To start filtering, select ▽ at the top of the list or select Shift+F3 to open the filter pane. You work with the filter pane as you do on any other list. For more information, see Filtering.

Filtering is especially helpful when viewing and analyzing longer documents. Imagine you open a posted sales invoice. Then, you filter the line items to display all line items that have an individual discount above 5%. Or, you filter to display only bike accessories with 'pro' in the name.

Focusing on Line Items

When working on documents that include a line items part, you can switch your view to focus only on the line items. Example documents are sales order or invoice page. The line items part expands so that it occupies almost the entire workspace. It hides other parts of the page except the actions area at the top. This layout gives you a better overview of the lines items, and provides more room to work on them.

You'll benefit particularly when you work with large line item lists and you want to enter data fast. This feature also provides advanced filtering capability. Like on other lists, browsing and searching through line items becomes even easier.

Switching the Focus On and Off

To focus on lines items, select anywhere in the line item part, and then choose ⬈ in the upper right corner, or select Ctrl+Shift+F12.

To switch back to the normal view, choose ⬈ or select Ctrl+Shift+F12 again.

Multitasking Across Multiple Pages

You can open a card or document page in a new window. Opening a new window lets you:

- Work on multiple tasks at the same time
- Manage interruptions to the current task, such as taking an incoming call.
- Keep a window open for an ongoing task while you start or complete another task in windows.

To open the current card or document in a new window, choose ⬈ in the upper right corner, or select Alt+Shift+W.

Note: When you open other pages from a card or document that is opened in a new window, those pages will open in a new window even though you don't choose ⬈.

Another way to multitask is to open Business Central on two or more browser tabs. When you do it this way, you should create a new tab and then copy/paste the URL of the original tab into the new tab. This way creates a new session.

Note: Don't use the Duplicate function of the browser to create the new tab as this may cause actions on one tab to block actions on other tabs because they are part of the same session.

Entering Quantities by Calculation

When entering numbers into quantity fields, such as the Quantity field on an item journal line, you can enter the formula instead of the sum quantity.

Examples

- If you enter 19+19, the field is calculated to 38.
- If you enter 41-9, the field is calculated to 32.
- If you enter 12*4, the field is calculated to 48.
- If you enter 12/4, the field is calculated to 3.

Entering Negative Numbers

You can enter negative numbers in two ways. The number -20.5 can be entered as:

- -20.5
  or
- 20.5-

In both cases, the amount will be recorded in as -20.5.

If the last character of the expression is a + or a -, the entire expression will be recorded with that sign. An example, 10-20+ will result in 10 and not -10.

Entering Dates and Times

You can enter dates and times in all the fields that are assigned to dates (date fields). You can enter dates with or without separators.

Entering Dates

You can either use the data picker to select a date from a calendar, or you can enter dates manually. This section provides a brief overview of how to enter dates. For more information, see Work with Calendar Dates and Times.

For manually date entry, you can enter two, four, six, or eight digits:

- Two digits are interpreted as the day. It will add the month and the year of the work date.
- Four digits are interpreted as the day and the month. It will add the year of the work date.
- If the date you want is in the range 01/01/1950 through 12/31/2049, enter the year with two digits. Otherwise, enter the year with four digits.

You can also enter a date as a weekday followed by a week number. Or, you can enter a year. For example, Mon25 or mon25 means Monday in week 25.

Instead of entering a specific date, you can enter one of these codes.

Code	Result
t	Specifies today's date (the system date for the computer).
p	Specifies an accounting period, where p means the first accounting period, p2 means the second accounting period, and so on.
w	Specifies the work date that is set up in the application. You may want to use a work date if you have many transactions with a date other than today's date.
c	Specifies that the date after c is a closing date, for example C123101.

Entering Times

When you enter times, you can insert any separator sign that you want between the units, but it isn't required. You don't have to write minutes, seconds, or AM/PM.

The following table lists the various ways in which times can be entered and how they're interpreted.

Entry	Interpretation
5	05:00:00
5:30	05:30:00
0530	05:30:00
5:30:5	05:30:05
053005	05:30:05
5:30:5,50	05:30:05.5
053005050	05:30:05.05

You enter two digits for each unit of time if you don't enter a separator.

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Entering Combined Datetimes

When you enter datetimes, which are a date and time combined into one field, you must enter a space between the date and the time. The date part can only contain spaces in the form of the official date separator of your region settings. The time can contain spaces around the AM/PM indicator in relevant regional settings.

The following table lists the various ways in which you can enter datetimes and how they're interpreted.

Entry	Interpretation
08-01-2022 05:48:12 PM	08-01-2022 05:48:12 PM
131222 132455	13-12-22 13:24:55
1-12-22 10	01-12-22 10:00:00
1.12.22 5	01-12-22 05:00:00
1.12.22	01-12-22 00:00:00
11 12	11-current month-current year 12:00:00
1112 12	11-12-current year 12:00:00
t or today	today's date 00:00:00
t time	today's date actual time
t 10:30	today's date 10:30:00
t 3:3:3	today's date 03:03:03
w or workdate	the working date 00:00:00
m or Monday	Monday of the current week 00:00:00
tu or Tuesday	Tuesday of the current week 00:00:00
we or Wednesday	Wednesday of the current week 00:00:00
th or Thursday	Thursday of the current week 00:00:00
f or Friday	Friday of the current week 00:00:00
s or Saturday	Saturday of the current week 00:00:00
su or Sunday	Sunday of the current week 00:00:00
tu 10:30	Tuesday of the current week 10:30:00
tu 3:3:3	Tuesday of the current week 03:03:03
t23 t	Tuesday of week 23 of the work date year, current time of day
t23	Tuesday of week 23 of the work date year
t 23	Today 23:00:00
t-1	Tuesday of week 1 of the work date year

Entering Duration

You enter a duration as a number followed by its unit of measure.

Here are some examples.

Duration	Unit of measure**
2h	2 hrs

Duration	Unit of measure**
6h 30 m	6 hrs 30 mins
6.5h	6 hrs 30 mins
90m	1 hr 30 mins
2d 6h 30m	2 days 6 hrs 30 mins
2d 6h 30m 56s 600ms	2 days 6 hrs 30 mins 56 secs 600 msecs

You can also enter a number and it's automatically converted to a duration. The number you enter is converted according to the default unit of measure that has been specified for the duration field.

To see the unit of measure used in a duration field, enter a number and see which unit of measure it's converted to.

The number 5 is converted to 5 hrs, if the unit of measure is hours.

Viewing and Editing in Excel From Business Central

With pages that display a list of records in rows and columns, like a list of customers, sale orders, or invoices, you can export the list to Microsoft Excel, and view it there. Depending on the page, you have two options for viewing in Excel. Both options are available from the Share icon ⤴ at the top of a page. You can either select the Open in Excel action or the Edit in Excel action on the page. This article explains the two actions.

Open in Excel

With the Open in Excel action, you can make changes to the records in Excel, but you can't publish the changes back to Business Central. You can only save the changes to Excel file, without affecting data in Business Central.

- With this action, Excel respects any filters on the page that limit the records shown. The Excel workbook will contain the same rows and columns that appear on the page in Business Central.
- This action works on both on Windows and macOS.
- If your organization has configured OneDrive for system features, the Excel workbook is opened in your browser by using Excel for the web. If you're not using OneDrive for system features, the workbook is downloaded to your device. From there, you can open it using either the Excel desktop app or Excel for the web, depending on what you have.

Tip: What about reports? Well, you can export the report results to an Excel file for viewing the full dataset, including all columns. The Excel file can help you validate that the report returns the expected data. To export a report, run the report and select the Send to > Microsoft Excel Document (data only) on the request page.

Edit in Excel

The Edit in Excel action is available on most lists, but not all. With the Edit in Excel action, you make changes to records in Excel and then publish the changes back to Business Central. When Excel opens, you'll see the Excel Add-in pane on the right.

- With this action, Excel respects most filters on the page that limit the records shown, so the Excel workbook will contain almost the same records and columns.
- To get the latest data from Business Central, choose Refresh in the Excel Add-in pane.
- If your organization has configured OneDrive for system features, the Excel workbook is opened in your browser by using Excel for the web. If you're not using OneDrive for system features, the workbook is downloaded to your device. From there, you can open it using either the Excel desktop app or Excel for the web, depending on what you have.

First-time sign-in

The Edit in Excel action requires that the Business Central add-in is installed in Excel. In some cases, your administrator may have set up the add-in to install automatically for you. In this case, you just have to sign in to Business Central in Excel Add-in pane with your user name and password. Otherwise, the New Office Add-in pane opens. To install the add-in, choose Trust this add-in, which will install the add-in directly from the Office Store.

If the add-in doesn't install, either contact your admin or try to install it manually. For more information, see Install the add-in manually for your own use.

Work across environments and companies

You can switch the company that you're working with. To switch company, select the Options icon ⚙ in the Excel Add-in pane, then select the company from the Company field.

Important: When changing the company, make sure that the Environment field is not empty. If it is, then set it to one of the available options; otherwise, the add-in will not work correctly.

If you make changes to the add-in, you must reload it to update the connection. To reload, use

the ⟨ menu in the top-right corner of the add-in. If you can't load the add-in, talk to your administrator. If you're the administrator, see Get the Business Central Add-in for Excel.

Note: The add-in works with Excel for the web (online) from any device as long as as use a supported browser. It also works with the Excel app for Windows (PC); but not for macOS. For Business Central on-premises, the Edit in Excel action is only available if the Excel add-in has been configured by your administrator, and only available for the Web client. For administrators, if you want to learn how to install the Excel add-in, see Setting up the Excel Add-In for Editing Business Central Data.

Limits when using Excel for the web

When Edit in Excel is used on list pages for tables with many columns, the resulting workbook may have too many columns for the file to be viewed in Excel for the web. Business Central automatically limits the exported workbook to 100 columns when OneDrive is configured for system features.

Manage attachments, links, and notes on cards and documents

On most list pages, cards, and documents, you can attach files, add links, and write notes on the Attachments tab of the FactBox pane. The number in the tab title indicates how many attached files, links, or notes exist for the card or document.

On the Lines FastTab, you can also use the Attachments action to attach documents to a specific line. For example, you might want to attach design specifications to an item on a purchase invoice.

Attachments, links, and notes stay attached to the card or document while it's processed into other states. For example, from an ongoing sales order to a posted sales invoice. However, none of the attachment types are output from the system, for example, when printing or when saving to a file.

You can also add attachments to the emails you send from Business Central. When you send an email directly from a document, such as a sales quote, the Add file from source document action lets you choose files that are attached to it. You can only choose files that are attached to the document. You can't choose files that are attached to lines.

Note: When you partially ship and invoice a sales or purchase order, the attachment will only be attached to the final invoice of the order. Similarly, when you invoice deferrals, the attachment is attached to the G/L entries for the document but not for the deferral entries. If you delete an order before it is invoiced, the attachment is also removed. When you use the Get Receipt Lines action on a purchase invoice, the attachment on the related purchase order is added to the purchase invoice.

To attach a file to a purchase invoice

You can attach any type of file, such as text, image, or video files, to a card, document, or a line on a document. This is useful, for example, when you want to store a vendor's invoice as a PDF file on the related purchase invoice in Business Central.

Note: Files attached with the Incoming Documents feature aren't included on the Attachments tab. For more information, see Incoming Documents. The same is true for files that are attached to lines on documents.

The following procedure is based on a purchase invoice. The steps are similar for all other supported documents and cards.

Tip: If your attachment is specific to a line on a document, you can attach it to the line. Choose the line, and then choose the Attachments action.

1. Choose the 🔎 icon, enter Purchase Invoices, and then choose the related link.
2. Open the purchase invoice that you want to attach a file to.
3. On the FactBox pane, choose the Attachments tab.
4. Choose the value behind the Documents field, such as "0".
5. On the Attached Documents page, in the Attachment field.
6. On the Attach a document dialog box, do one of the following steps to attach a file:
7. Drag the file from file explorer on your device to the dialog box.
8. Select the click here to browse link, find the file, then select the Open button.

The file is now attached to the purchase invoice.

To view an attached file

1. On the FactBox, open the Attachments tab.
2. Choose the value behind the Documents field, such as "1".
3. On the Attached Documents page, choose the Preview action.

4. Open the downloaded file.

To save a document as a PDF attachment

Whenever you need to save a document as a file, you can use the Attach as PDF action to capture the current document content as a PDF file attached to the FactBox of the document. This is useful, for example, when documents follow multiple steps in a process, such as a sales process or an approval workflow, and you want to refer to a printout of the previous step.

The following procedure is based on a sales order. The steps are similar for all supported documents.

1. Choose the 🔎 icon, enter Sales Orders, and then choose the related link.
2. Select a sales order, and then choose the Attach as PDF action.

A PDF file with the current content of the sales order is added to the Attachments tab in the FactBox.

To add a link from an item card

You can add a link from a card or document to any URL. This is useful, for example, when you want to link an item card with the supplier's item catalog.

The following procedure is based on an item card. The steps are similar for all other supported cards and documents.

1. Choose the 🔎 icon, enter Items, and then choose the related link.
2. Select the item that you want to add a link from, and then choose the Attachments tab in the FactBox.
3. In the Links, choose the + icon.
4. In the Link Address field, enter the link.
   The link must be a valid internet or intranet URL.
5. In the Description field, enter any information about the link.
6. Choose the OK button.

The link is now attached to the item card.

To write a note on a sales order

You can write a note on a document or card, for example, to communicate special instructions to other users of the document or card. You can include file links and URLs in notes.

Note: Notes on the Attachments tab are not related to internal notes functionality, which is mainly used to communicate between workflow users. For more information, see Setting Up Workflow Notifications.

The following procedure is based on a sales order. The steps are similar for all other supported documents and cards.

1. Choose the 🔎 icon, enter Sales Orders, and then choose the related link.
2. Select the sales order that you want to write a note on, and then choose the Attachments tab in the FactBox.
3. In the Notes section, choose the + icon.
4. In the Note field, write any text, such as "This is an urgent order.".
5. Choose the OK button.

The note is now attached to the sales order.

Change Basic Settings

On the My Settings page, you can see and change basic settings for your Business Central. The changes that you make will only affect your workspace, not the workspaces of other users.

Role

The role determines the home page, a starting screen that is designed for the needs of a specific role in an organization. Depending on your role, the home page, or role center, gives you an overview of the business, your department, or your personal tasks. It also helps you navigate to your daily tasks and find work that is assigned to you.

At the top, the navigation allows you to switch between customers, vendors, items, and other important lists of information. Similarly, actions allow you to initiate tasks, such as create a new sales invoice, directly from the home page.

In the center, you find the Activities area, which shows current data and can be selected to view more detailed information. Key performance indicators (KPIs) can be set up to display a selected chart for a visual representation of, for example, cash flow or income and expenses. You can also build up a list of favorite customers on the home page for business accounts that you do business with often or need to pay special attention to.

Change the role

The default role is Business Manager, but you can select another role to use a role center that fits your needs better.

1. In the top right corner, choose the Settings icon ⚙, and then choose the My Settings action.
2. On the My Settings page, in the Role field, select the role that you want to use by default. For example, select Accountant.
3. Choose OK.

Company

A company functions as a container for data in Business Central. There can be multiple companies in a database, but only one can be selected at a time. The default company is called CRONUS and contains demonstration data only.

The Company field shows the company you're currently working in, and you can use it to switch to another company. The company name is always displayed at the upper-left corner and works as an action that you can choose to go back to the Role Center.

Tip: You can also change the company by using the company switcher (Crtl+O).

The default company is called CRONUS and contains demonstration data only. You can create a new company with custom data. For more information, see Creating New Companies.

Work date

The most commonly used work date is today's date. You may have to temporarily change the work date to be able to perform tasks, such as completing transactions for a date that is not today.

Tip: In all date fields, type t to quickly enter today's date, and type w to quickly enter the work date, which is the value in the Work Date field on the My Settings page.

Important: After you change the work date, if you sign out or switch to another company, the work data reverts to the default work date. So the next time you sign in or switch back to the original company, you may have to set the work date again.

Work date indication

The work date is critical on pages that can be edited. Whenever the work date isn't set to today's date on an editable page, then two types of indicators appear on the page:

- A reminder appears at the top of the page that tells you what the work date is set to. The reminder provides a direct link to the work date setting on the My Settings page so you change the date if you want. From the reminder, you can also choose to dismiss the reminder for the rest of your session. Unless you change the work date to "today", the reminder will appear the next time you sign in.
- If you dismiss the reminder, the work date will appear in the title of the page.

If the work date isn't set to the current day (today), then on all pages where you can edit data, the current work date appears in the upper-left corner.

Region

The Region setting determines how dates, times, numbers, and currencies are shown or formatted. It also determines what character is used as the decimal separator when using a numeric keyboard to enter data.

Language

Changes the display language. This field appears only when there's more than one language to choose from.

The initial language is either determined by the administrator or by your browser settings when you sign up for Business Central. The language that you set will be used on all devices that you sign in from, such as a phone or tablet.

Additional languages for Business Central can be installed from AppSource. While all supported display languages are shown in the list, the administrator must install the relevant language app to the tenant before users can switch to the new language in Business Central.

Time zone

Defines the time zone where you are located. When you first sign into Business Central, the time zone is set based on your company's address. Change it if it doesn't fit your physical location.

Notifications

Choose the Change when I receive notifications link to view or change the notifications that you get about certain events or status changes, such as when you are about to invoice a customer who has an overdue balance, or the available inventory is lower than the quantity you are about to sell. Learn more at Managing Notifications.

Teaching tips

Some pages display a teaching tip with a short introduction to the page. Switch off teaching tips if you are not interested in seeing these short introductions when you open the relevant pages. If you switch off teaching tips, you can still open the teaching tip for a specific page by choosing the page title in the top left corner.

Manage Notifications

Business Central can help you work smarter by notifying you about certain events or changes in status, such as when you are about to invoice a customer who has an overdue balance, or the available inventory is lower than the quantity you are about to sell, for example. These notifications are shown as discreet tips in the context of the task you are doing, and you can choose to ignore the notification or to see details about the issue.

If you choose to see details for a notification, you can take action to resolve the issue, such as contacting the customer, buying more inventory, and so on. It's your choice what to do, and Business Central gives you advice and recommendations.

Notifications can help untrained users complete unfamiliar tasks, and do not reduce productivity for the more trained user.

To turn notifications on or off, and control when they are sent

When you first start with Business Central all notifications are turned on, but you can turn them on or off, for example, if you aren't interested in a certain event or status.

Additionally, some notifications let you specify the conditions under which they are sent. For example, if you want to be notified when inventory is running low, but only for items you buy from a certain vendor.

Turning notifications on or off, and specifying conditions, applies only to you.

1. In the top right corner, choose the Settings icon ⚙, and then choose the My Settings action.
2. On the My Settings page, in the Notifications field, choose the Change when I receive notifications. link.
3. In the page that appears, turn on or turn off a notification by selecting or clearing the Enabled check box.
4. To specify conditions that trigger a notification, choose the View filter details link, and then fill in the fields.

Personalize your workspace

You can personalize your workspace to suit your work and preferences. Change pages so that they display only the information you need, where you need it. Personalization affects only your workspace. It doesn't change how others work. You can personalize all types of pages, including the role center page.

You can make various changes, such as move or hide fields, columns, actions, and entire parts, and add new fields. Most personalization must be done by first activating the Personalizing banner. You can make simple adjustments, such as the column width, immediately on any list.

Note: Administrators can make the same layout changes as users by customizing profile (role) that multiple users are assigned. To learn more about pages for Roles, go to Customize Pages for Roles. Administrators can also override or disable users' personalization, and they can define which features are even available for users to see in all or specific companies. For more information, see Customizing Business Central.

Change the width of a column

You can easily resize columns on any list. Just drag the boundary between two columns to the left or the right.

1. In the header of a list, select and drag the boundary between two columns.
2. Alternatively, double-click the boundary between two columns to autofit the width of the column. The width adjusts to the optimal size for readability.

As for other personalization, the changes you make to column width are stored on your account and follow you no matter which device you sign into.

Start personalizing by using the personalization mode

1. Open any page that you want to personalize.
2. In the upper-right corner, select the ⚙ icon, and then choose the Personalize action.
   The Personalizing banner appears at the top to indicate that you can start making changes.
   Note: To navigate during personalization, use Ctrl+Clickon an action if it is highlighted by the arrowhead.
   If you see a 🔒 or ⊖ on the banner, you can't personalize the page. For more information, see Why a Page is Locked from Personalization.
3. To change a UI element, point to the element, such as an action, a field, or a part. The element is immediately highlighted with an arrowhead or border. Choose the element, and then choose either Move, Remove, Hide, Show, Show under "Show more", Show when collapsed, Show always, Set/Clear Freeze Pane, or Include/Exclude from Quick Entry, depending on the type and state of the UI element.
4. To add a field, choose the + Field action. From the Add Field to Page pane, drag and drop a field into the desired position on the page.
5. When you have finished changing the layout of one or more pages, choose the Done button on the Personalizing banner.

What you can personalize

What do you want to do	How to do it	Remarks
Move something, like a field, column in list, tile, action, or part to another place on the page	Point anywhere on what you want to move, and drag it to its new position. A thick horizontal or vertical line indicates the position. 🚫 indicates that you can't move the element to the selected position.	Parts are subdivisions or areas on a page that contain things like multiple fields, another page, a chart, or tiles. Learn more about personalizing actions Learn more about personalizing parts

What do you want to do	How to do it	Remarks
Hide an element that's currently shown, like a field, column in list, tile, action, or part.	Select the element, select the arrowhead, and then select Hide.	In the personalization mode, hidden actions are grayed with italic text, and hidden parts are shaded by diagonal lines. Hidden fields and columns aren't indicated on the page. When you exit personalization mode, all elements disappear from view. If the field you hide is also shown on the FastTab heading when the FastTab is collapsed, the field no longer appears there.
Show an action or part that is currently hidden	For a grayed (hidden) element, choose the arrowhead, and then choose Show.	The hidden element is visible again.
Show a field that's currently hidden	In the Personalizing banner, choose the + Field action. The Add Field to Page pane opens on the right side of the page. If you select a field in the pane, it's hidden location appears on the page. To show a field, drag it from the pane or from its hidden location to the position that you want it. The position is indicated by either a thick horizontal or vertical line. Another way is to select the arrowhead in the field's hidden location and select Show.	Each page includes a predefined set of fields that you can choose to display. Learn more about working fields
Display a field in the heading of a FastTab when it's collapsed.	Choose the arrowhead, and then choose Show when collapsed. If you don't see this option, then it's already set. In this case, to stop displaying the field on the FastTab heading, choose Show always.	FastTab is the term used for a group of fields that appear under a common heading. Use the Show when collapsed option to display the most important fields. If you select a field in the heading, the FastTab opens and focuses on the selected field. This option is only applicable if a page has a more than one FastTab. If there's only one FastTab, it can't be collapsed, so

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What do you want to do	How to do it	Remarks
		the Show when collapsed option isn't available.
Make a field display only when you select Show more.	Choose the arrowhead, and then choose Show under "Show More".	If you don't see the Show under "Show More" option, then the field's already set. In this case, to make a field display always, not just when you select Show more, choose Show always.
Change whether or not a field can be edited.	Select the field, select the arrowhead on the field, and then select Lock editing to prevent changing the field's value or Unlock editing to allow changing the field's value.	You can only unlock fields that you've previously locked yourself. Some fields are locked by default, either by design or by a profile admin who has customized the page. These fields can't be unlocked.
Change the freeze pane in a list to another column.	Choose the arrowhead of the column that you want as the last column of the freeze pane, and then choose Set Freeze Pane.\n\nIf you want to set the freeze pane back to its original designed position, choose the arrowhead for the current freeze pane column, and choose Clear Freeze Pane. Note: You can't remove this freeze pane.	The freeze pane specifies the columns that always appear on the left side of the list, even as you scroll horizontally.
Skip over a field when pressing Enter.	Choose the arrowhead next to the field, or column heading in a list, and choose Exclude from Quick Entry.	If you don't see Exclude from Quick Entry, then the field is already skipped. In this case, to stop skipping the field, choose Include in Quick Entry.\n\nLearn more about Quick Entry
Reorder and remove views representing filtered lists.	Choose the arrowhead next to a view, and then choose Move, Remove, or Hide.	Learn more about saving and personalizing list views

What do you want to do	How to do it	Remarks
Add a new action to a page or report on your Role Center.	From the target page, report request page, or Tell Me window, choose the bookmark icon.	[Learn more about bookmarking pages and reports](#)
Always start a list as expanded or collapsed	Choose the Expand All or Collapse All button in the top-left corner of the list. Alternatively, choose the Expand All or Collapse All action in the menu of the first column.	Applies to collapsible hierarchy lists

Personalize action bar and menus

Personalization lets you decide which actions to show on the navigation and action bars and on Role Centers, and where to show them. You can show, hide, or move individual actions or action groups.

Personalizing the navigation and action bars is done basically the same way as with other UI elements. However, what you can do with an action or group depends on where the action or group is located. The best way to find out is to enter personalizing mode and then let the arrowheads guide you.

There are a couple terms that you should be familiar with to better understand action personalization: action group and promoted category.

An action group is an element that expands to display other actions or groups. For example, on the Sales Orders page, one action group is the Functions action that appears when you choose the Actions action.

A promoted category is an action group that appears before the vertical line | on the action bar. The categories typically include the most commonly used actions, so that you can quickly find them. For example, on the Sales Orders page, the Order, Release, and Posting actions are promoted categories.

Note: To clear personalization, select the arrowhead around the part's designer menu, and then choose Clear personalization.

Remove, hide, and show actions and action groups

When you want to show or hide an action, the options under the arrowhead define what can do depending on the action's state.

1. Choose the arrowhead for an action or action group.
2. Choose from one of the following options:

Option	What it does
Remove	This option appears if the selected action is also shown somewhere else on the navigation bar or action bar. Choosing this option deletes the action from the selected location so that it no longer appears. The action or action group remains in the other locations.
Hide	This option appears if the action or action group isn't located anywhere else on the navigation bar or action bar. Like Remove, choosing this option makes the action or action group disappear from the navigation bar or action bar. However, in personalizing mode, the action or action group are still shown in the current position, except that it appears dimmed.

Option	What it does
Show	This option appears if the action or action group has been previously hidden (dimmed). Choosing this option makes the action or action group appear on the navigation bar or action bar.

Move actions and action groups

Where you can drop actions or actions groups is indicated by a horizontal line between two actions or a border around an action group. The following limitations exist:

- You can move individual actions into the promoted categories, but you can't rearrange the order of the actions in the category.
- You can't move an action group into a promoted category.
1. To move an action or action group, drag and drop it to the desired position, like you do with fields and columns.
2. To move an action or action group into another action group that is empty, drag the action or action group to the new group and drop it in the Drop an action here box.

About the Automate menu

- You can't hide or move the Automate menu or the Power Automate submenu and its actions.
- You can move flows included under the Automate item, but you can't hide them using personalization. Moving the flow makes a copy the flow to the destination, it doesn't remove it from the Automate item.

Personalize parts

Point to or select Alt+Up Arrow Parts are areas on a page that are typically composed of multiple fields, charts or other content. A part shows a colored border when you focus on the part. For example, a Role Center home screen has multiple parts. Because of their well-defined boundary, you can personalize the entire part and its' contents.

- To move a part, drag and drop it to the desired position. A colored line indicates valid positions on the screen. For example, FactBoxes can only be moved next to other FactBoxes in the FactBox pane.
- You can hide a part by choosing the Hide option under the arrowhead.
- When you start personalizing or navigate to a new page, any parts that are currently hidden appear on the page with distinctive visuals to indicate they're hidden. You can unhide that part by choosing the Show option under the arrowhead.

You can clear all personalization changes that you have made within a single part by choosing the Clear personalization option under the part's arrowhead. Clearing personalization of a part only affects changes to the contents of the part, not the placement or visibility of the part on the page.

Work with fields and columns

When personalizing a page, you use Add field to page pane to show fields that are currently hidden on the page. You open this pane by selecting the + Field action near the top of the page.Unlike other elements, hidden fields aren't indicated on the page itself in personalization mode. However, you can identify hidden fields by using the Add field to page pane.

To make working with fields easier, here are some general guidelines to follow when using the Add field to page pane:

- By default, the pane lists all hidden fields, which are marked by the [Shows the hidden field icon](#) icon.
- You can filter the list show other fields, like those currently shown on the page, by selecting the Recommended fields button above the list and choosing a filter option. The name of the button changes based on the filter option you choose.
- Selecting a field in the list highlights its location on the page. If the field's currently hidden, it's designed location is shown in a shaded state.
- To get more details about a field in the list, point to it or select Alt+Up Arrow to display a tooltip.
- The fields available in the Add field to page pane are determined by the developer of the page and its source table, or by a profile admin who has [customized the page](#). You can't create new ones.
- Some pages have multiple page fields that map to the same source table. The pane will show both/all of those page fields independently. Showing/Hiding/moving those fields is also independent without one affecting the other.

Make a hidden field visible

There are two ways to show a field that's currently hidden on the page:

- Drag the field to the desired position. A thick horizontal or vertical line indicates the target location.
- Select the field in the list, then go to the shaded field on the page and select the Show option.

Clear personalization

At some point, you might want to undo some or all of the personalization changes that you have made to a page over time.

1. On the Personalizing banner, choose the Clear personalization action.
2. Choose one of the following options.

Caution: Clearing personalization can't be undone.

Option	What it does
Only Navigation Menu	Clears any personalization changes that you have ever made to the navigation menu that is shared across the Role Center and other pages. Such changes include any new actions that were added as bookmarks, and any changes to links and groups in the menu.
Only Actions	Clears any personalization changes that you have ever made on the navigation or action bars on the page.
Only Fields and Columns	Clears any personalization changes that you have ever made to the page except changes on the navigation or action bar. Such changes include changes to fields, columns, parts, and tiles.
All	Clears all personalization changes that you have made to the page so it looks like it did originally. Such changes include changes to navigation and action bars, fields, columns, parts, and tiles.

Tips and other points of interest

To help you better understand personalization, here are some pointers.

- When you make changes to a card page that you open from a list, the changes take effect on all records that you open from that list. For example, let's say you open a specific customer from the Customers list page, and then personalize the page by adding a field. When you open other customers from the list, the field that you added is also shown.
- Changes that you make affect all your Role Centers. For example, if you make a change to the Customer list when the Role Center is set to Business Manager, you also see the change on the Customers page when the Role Center is set to Sales Order Processor.
- Changes to a page in a pane take effect on the page where ever it's shown.
- You can't personalize a page that's in analysis mode. The Analyze switch is deactivated. If you happen to switch to personalization mode while the page is in analysis mode, then analyze mode is automatically switched off.
- Some pages have multiple page fields that map to the same source table. The pane will show both/all of those page fields independently. Showing/Hiding/moving those fields is also independent without one affecting the other.
- If a part or group is hidden, ghosted fields will still show inside it, but you cannot drag-drop or add/show that field until you make the group/part visible.

Run and Print Reports

A report gathers information based on a specified set of criteria. It organizes and presents the information in an easy-to-read format you can print or save as a file. There are many reports you can access throughout the application. The reports typically provide information related to the context of the page you're on. For example, the Customer page includes reports for the top 10 customers, sales statistics, and more.

Note: Batch jobs and XMLports do more or less the same as reports, but are used more for processing or exporting data. So, for example, the Create Reminders batch job creates reminder documents to send to customers with overdue payments. This article refers mainly to "reports", but similar information applies to batch jobs and XMLports.

Get started

You find reports in the Reports menu on selected pages, lists, and cards, or you can use the search 🔍 to find reports by name. For an overview of built-in reports you can use in Business Central, sorted by categories, see Available Reports in Business Central.

When you choose a report, you're typically presented with a request page—titled after the report's name—where you set various options and filters that determine what data is included. The following sections explain how to use the request page to build, preview, and print a report.

Using default values—predefined settings

Most report request pages include the Use default values from field. With this field you can select predefined settings for the report, which automatically set options and filters. Select an entry from the dropdown list to see the options and filters on the report request page change accordingly.

The entry called Last used options and filters is always available. This entry sets the report to use the options and filters you used the last time you ran the report.

The Use default values from field provides a fast and reliable way to consistently generate reports that contain the correct data. After you select an entry, you can change any of the options and filters before previewing or printing the report. The changes you make won't be saved to the predefined settings entry you selected, but they'll be saved to the Last used options and filters entry.

Note: The predefined settings are typically set up and managed by an administrator. Learn more at Manage Saved Settings for Reports and Batch Jobs.

Specifying the data to include in a report

Use the fields under Options and Filters to change or limit the information you want in the report. You can set filters in a report in more or less the same way as you set filters on lists. Learn more in the Filtering section.

Caution: The Filter FastTab on a report request page provides a generic filtering capability for reports. These filters are optional. Some reports ignore any such filters, meaning no matter what filter is set in the Filter FastTab, the output of the report is the same. It's not possible to provide a list of which fields are ignored in which reports, so you'll have to experiment with the filters when using them. Example: When you use the Create Reminders batch job, a filter for the Customer Ledger Entries field of Last Issued Reminder Level is ignored because filters are fixed for that batch job.

Previewing a report

By previewing a report, you can see what the report will look like before you print it. The preview isn't based on the printer selected in the Printer field on the request page. It's controlled by the browser. After previewing, you can then go back to the request page and make changes to options and filters as needed.

The preview choices on the Report Request page depend on the report. So for some reports you can choose Preview, while for others the choice is Preview & Close. Both choices open a preview of the report. The difference is that Preview keeps the request page open, so you can go back to it, make changes, preview again, or print. In contrast, with Preview & Close the request page closes, and you'll have to open the report again to make changes or print.

Note: If you're using Business Central 2020 release wave 1 or earlier, the only choice is Preview, which closes the request page on preview, as described above for Preview & Close.

Work with the preview

In the preview, use the menu bar on the report preview to:

- Move through pages
- Zoom in and out
- Resize to fit the page
- Select text
- You can copy text from a report, then paste it somewhere else, such as a page in Business Central or Microsoft Word. Using a mouse, for example, you select the left mouse button and hold where you want to start. Slide the mouse to select one or more words, sentences, or

paragraphs. Then select the right mouse button and select Copy. You can now paste the selected text where you want it.

- Pan the document
- You can move the visible area of the report in any direction to view other areas of the report. Panning is helpful when you've zoomed in to see details. Using your mouse, for example, select and hold the left mouse button anywhere in the report preview, and then move your mouse to select a section of the report.
- Download to a PDF file on your computer or network.
- Print

Saving a report to a file

You can save a report to a PDF document, Microsoft Word document, Microsoft Excel workbook, or XML document by choosing Send to, then making your selection. A file is downloaded to your device.

If your organization has configured OneDrive for system features, instead of being downloaded, Excel workbooks and Word documents are opened in your browser using either Excel or Word for the web.

You can also use Microsoft Excel Document (data only) to create new Excel layouts for a given report. Learn more at Work with Excel Layouts.

Scheduling a report to run later or periodically

You can schedule a single or recurring report to run at a specific date and time. Scheduled reports are entered in the job queue and processed at the scheduled time, similar to other jobs. Choose the Schedule option after selecting Send to, then enter information, such as the printer, and time and date. The report is added to the job queue and runs at the specified time. When the report is processed, the item is removed from the job queue. Learn more at Use Job Queues to Schedule Tasks.

When you schedule a report to run, you can specify, for example, that it must run every Thursday by setting the Next Run Date Formula field to D4. Learn more in the Use Date Formulas section.

You can choose to save the report to a file (such as Excel, Word, or PDF), print it, or only generate the report. If you choose to save the report to a file, then the processed report is sent to the Report Inbox page on your Role Center for you to view it. Learn more at Share and Export Reports with the Report Inbox

Manage scheduled recurring reports

Scheduled reports are generated by batch jobs managed on the Job Queue Entries page. You can see the status and other information for each report on the page, pause/resume the report batch job, and generate the report on demand.

From the Job Queue Entries page, you can also change some report parameters, such as the output file type, recurrence, run date, and starting and ending times. Before editing an existing scheduled report, however, it's necessary to put the report job queue on hold:

1. Choose the 🔎 icon, enter Job Queue Entries, then choose the related link.
2. On the Job Queue Entries page, choose the desired report.
3. Choose the Set On Hold action.
4. Open and edit the scheduled report by selecting its status (On Hold).

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After editing the report options, repeat the first two steps and then select the Set Status to Ready action to resume generating the report.

Learn more about job queue management at Use Job Queues to Schedule Tasks.

Printing a report

To print a report, choose Print on the report request page or on the menu bar of the Preview page.

When a report is using an Excel layout, you won't see the Printer field or Print or Preview buttons. Instead, there's a Download option. To print, select Download, then open the downloaded file in Excel and print from there.

Printer

The Printer field on the request page shows the name of printer the report is sent to. To change a printer, just select the printer from the list.

Note: The (Handled by the browser) option indicates there's no designated printer for the report. In this case, the browser handles the printout and displays the standard printing steps, where you can choose a local printer connected to your device. The (Handled by the browser) option isn't available in the Business Central mobile app or app for Microsoft Teams.

Tip: The printer that's selected for you by default is set up on the Printer Selections page. Learn more about changing the default printer in the Set up default printers section.

Switching the report layout

A report layout controls what is shown on a report, how it's arranged, and how it's styled. There are a few ways to change the layout:

When you're setting up to run a report, you'll see the current layout in the Report Layout field on the request page. To temporarily switch to a different layout, select the Report Layout field, then choose from a list of available layouts for the report.

To change the default layout used by a report, go to either the Report Layouts or Report Layout Selection pages.

Learn more at Set the Layout Used by a Report. Or, if you want to customize your own report layout, go to Get Started Creating Layouts.

Change language and format of numbers, dates, and times

By default, the language of text and format of numbers, dates, and times in a report are based on your working language and region settings, which are defined on the My Settings page. You can, however, change the language and format region on a case-by-case basis when you preview, print, or send a report. On the request page, set the Language and Format Region options to your preference. You can also specify the language and region format to use by default for customers and vendors on their card pages.

Depending on where you've specified the language and format settings, Business Central determines the settings to use in the following order:

1. The settings you specify when you generate a report.
2. The settings specified on the document, which come from the customer or vendor's settings.
3. The settings specified on the Report AL object.
4. The settings defined in My Settings.

Advanced options

The fields under the Advanced FastTab set limitations on the generated report to control printer resources. You typically won't have to change these settings, unless you have a large report. If a report exceeds these limitations when you try to preview or print, a message will indicate which limitation you've exceeded. You can then change the settings to suit your report. Each field, however, has a maximum value you should be aware of:

Field	Maximum value
Maximum rendering time	12:00:00
Maximum rows	1000000
Maximum documents	500