



IN PARTNERSHIP WITH OUR CUSTOMERS, OUR SUPPLIERS AND OUR STAFF

Support Portal User Manual

1. Contents

- 2. Welcome 3**
- 3. Access..... 3**
- 4. Logging On 3**
- 5. Log a support call..... 5**
 - 5.1. Filling out the support call form6
- 6. Existing support calls 7**
- 7. More Features..... 8**
 - 7.2. FAQs 9
 - 7.3. Product Focus 9
 - 7.4. Training Portal 10
- 8. News..... 11**
- 9. Your Feedback 11**

2. Welcome

Welcome to the manual for the Dynamics Consultant's support portal. Here you will find a guide about all of the features and how to use them.

If you would like to view a video guide, please see that at the following link:

https://www.youtube.com/watch?v=so_3T5NCKsk

3. Access

Access is provided by our support and admin teams. Please contact support@d-c.co.uk or speak to your main contact at Dynamics Consultants to discuss access. Access comes at two levels:

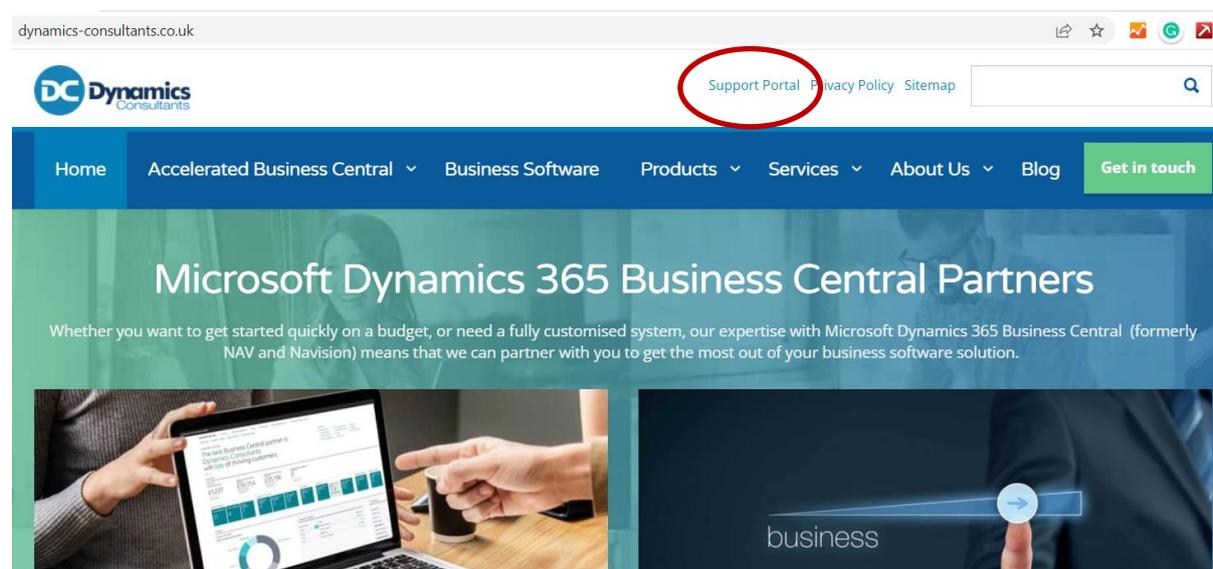
-  Key User – Full access with the ability to see support calls from your whole company
-  Standard User – Full access but with the ability to see only your own individual support calls

Key users at your company will be responsible for deciding who has access to log support calls.

On making the request, users will be given access via a Microsoft Business login or a Windows personal login – email addresses for users will need to be provided. Users will be sent an invitation email, which will come from Microsoft, and they will need to click to accept the invitation. Verification is by the user's account login details.

4. Logging On

Once you have access to the support portal, you can log on via the DC website, which you can find at the top of most pages:



This takes you to the following link: [Login | Dynamics Consultants Ltd \(dynamics-consultants.co.uk\)](https://dynamics-consultants.co.uk/Login)

You will then be taken to the Welcome screen:

Welcome to the Dynamics Consultants Support Portal

Please sign in to access the support portal. If you have access to our customer portal, the details will be the same. If you have any problems with logging in, please do not hesitate to contact our team.

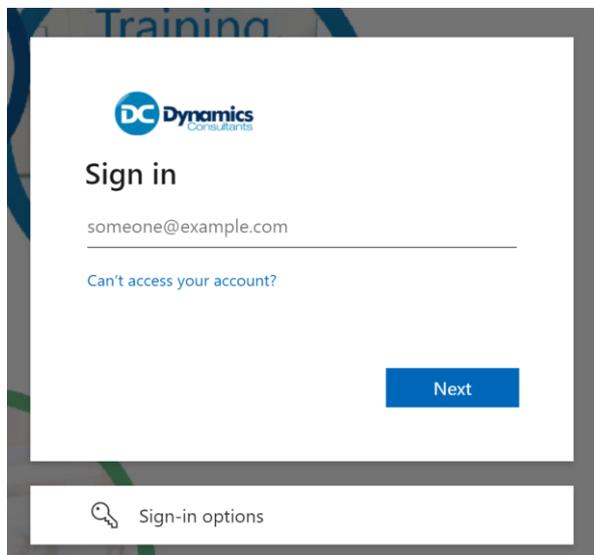
If you get any problems, please contact us.

[Contact Us](#) [Back to Home](#)

Please use your Microsoft 365 or Microsoft Personal Account to login

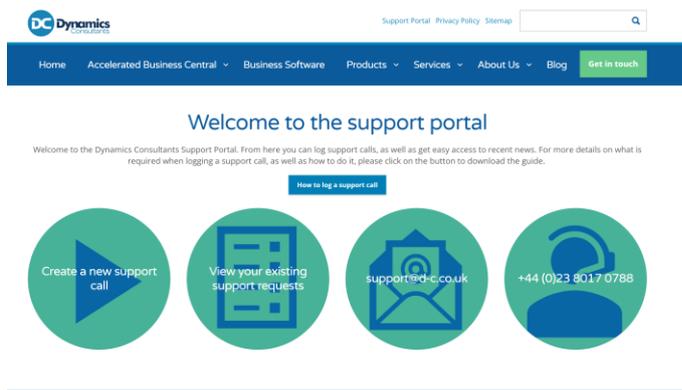
[Customer Login](#)

Click On Customer Logon to go to the Login Screen:



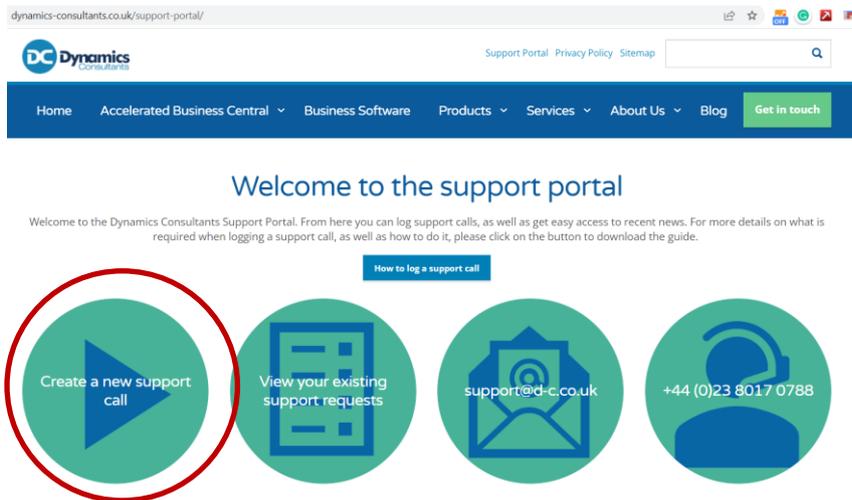
The username and password is either your Microsoft 365 Work email and password, or if your company does not have Microsoft 365 then you will require a Microsoft Personal account login. If you do not have a Microsoft Personal account, then you can sign up for one at www.outlook.com

This will then take you to the Support Portal main page.



5. Log a support call

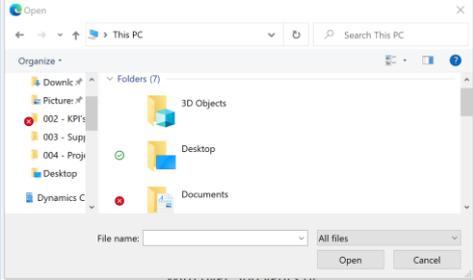
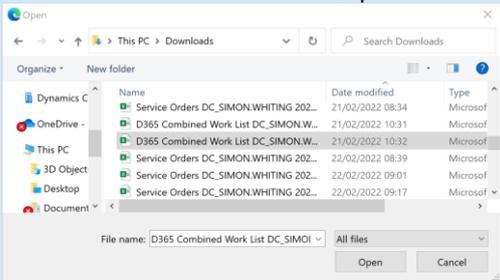
With access to the support portal, you will still be able to call us and email us if required. However, to make a support request via the support portal, click on the "Create a new support call" link.



Once on the new support call page, you will see a form:

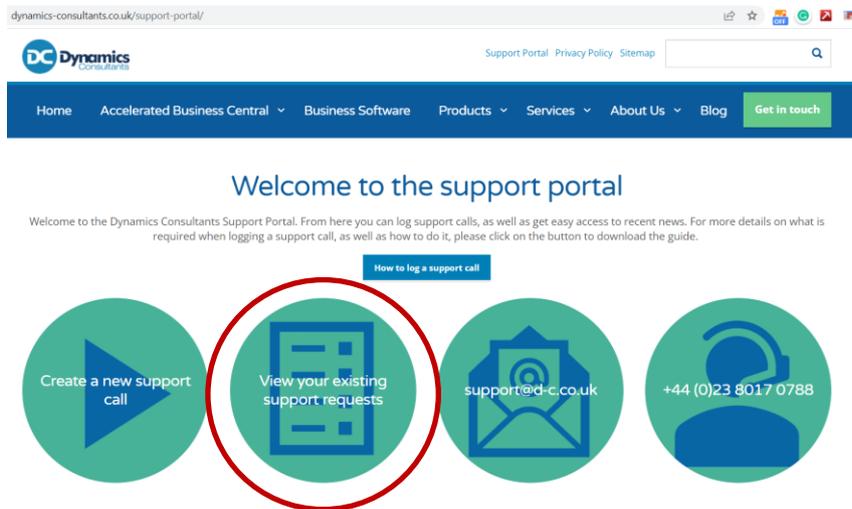
5.1. Filling out the support call form

The following is guidance for filling out the new support call form.

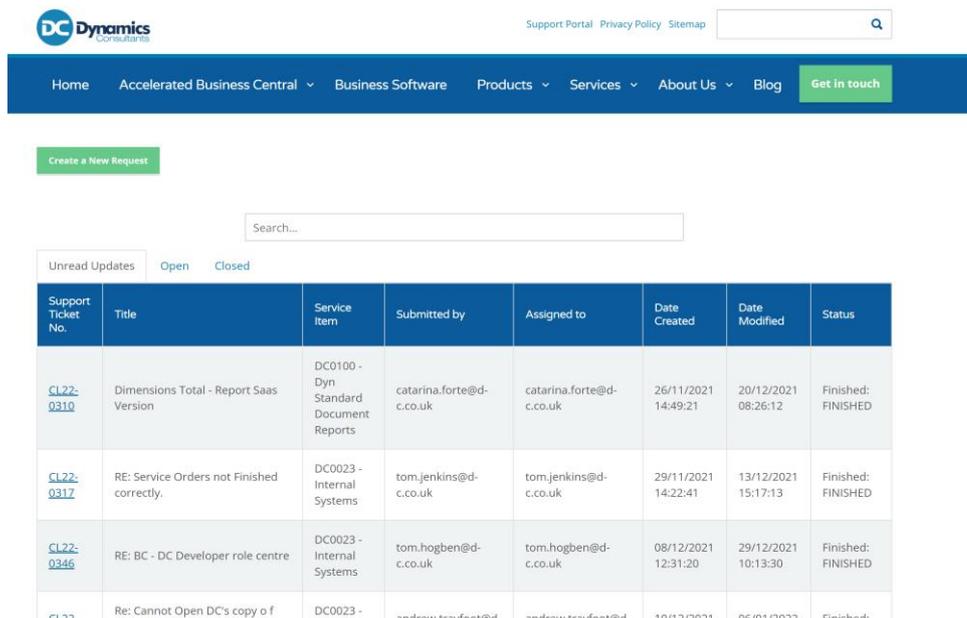
Service Item:	Select the most relevant Service Item from the list
Priority:	Select From - Low, Medium, High
Title	A short description of the Error
Description	A more detailed description of the fault. Please include enough detail for the issue to be located in the system for example document numbers.
Upload an Attachment	<p>Enter a Description of the File being sent Upload an attachment (optional)</p> <p>Please only add one, more can be added after ticket has been created</p> <p>File Description <input type="text" value="Sample File"/></p> <p>File <input type="text" value="Please only upload one file."/> <input type="button" value="Choose Files"/> D365 Combi...0_32_39.xlsx</p> <p><input type="button" value="Submit"/></p> <p>Click on Chose Files and Navigate to the file you wish to attach</p>  <p>Select the file and then click Open</p> 
Submit	<p>Click On Submit</p> <h2>New Support Call</h2> <div style="background-color: #e0f0e0; padding: 10px; border: 1px solid #ccc;"> <p>Ticket created successfully</p> </div>

6. Existing support calls

From the home page of the support portal, you can access your existing support requests:



You will then be taken to a table of support requests. The requests you will see will depend on your level of access, either all of your company's support requests, or only your individual support requests.



The table has three tabs:

- Unread Updates – those calls with an update that have not yet been viewed in the portal
- Open – All your current Open Calls
- Closed – All Closed Calls

You can view the details of the call by clicking on the Support Ticket No in the table. This will open a ticket as follows:

[< Back to All Tickets](#)

Ticket No : CL22-0636 Pending

Customer No. DYN01	Service Item DC0012 - Dyn Document Sending
Submitted by simon.whiting@d-c.co.uk	Created Date 02/03/2022 15:18:20
Assigned to simon.whiting@d-c.co.uk	Modified Date 02/03/2022 15:19:06
	Priority Medium

Title : Delete Me
Delete Me

Add New Comment

Comments 0 Fault 1 Resolution 0 All Attachments 0

There are no general comments for this ticket

From here you can add additional Comments and upload additional Attachments, as well as see comments and details from the Dynamics Consultants support team:

[< go back to view ticket](#)

Add General Comment

Pending Attachments
Enter an accompanying comment for these to be sent
Current Pending attachments:

File	<input type="text"/>		
Description	<input type="text"/>		
File	<input type="button" value="Choose Files"/> No file chosen	<input type="button" value="Add Attachment"/>	

Post Comment

7. More Features

There are several useful features of the support portal on top of the ability to manage support calls.



Frequently asked Questions

FAQs

Get answers to some of the commonly asked questions.

FAQs



Customer Portal

If you have access to your Customer Portal, you will already be signed in through Active Directory. This is the place to go for creating and managing work requests, etc.

Customer Portal



Training Portal

Get a reminder of how to use some of the standard Business Central functionality.

Training Portal



Sana Commerce

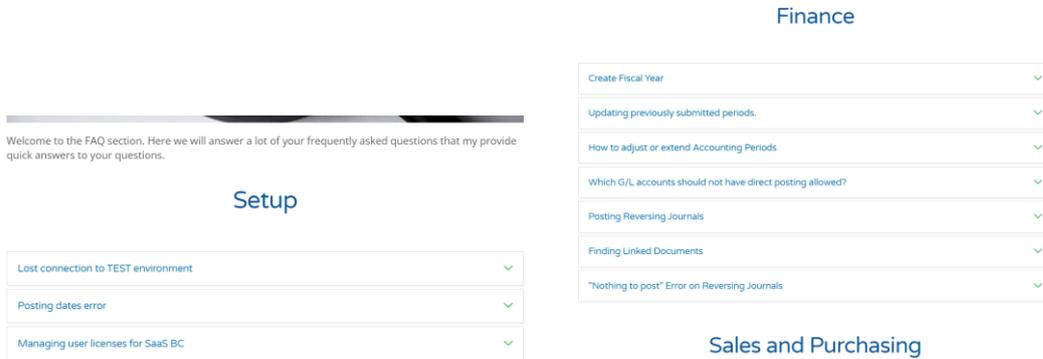
Product Focus

Sana Commerce professional e-Commerce solutions for Business Central and NAV.

Sana Commerce

7.2. FAQs

With a growing customer base, there are a range of questions that we get regularly. Through our FAQ section, you will be able to “self-service” for a fast and easy to follow response to several frequent questions, from setup to user level issues.



Welcome to the FAQ section. Here we will answer a lot of your frequently asked questions that may provide quick answers to your questions.

Setup

- Lost connection to TEST environment
- Posting dates error
- Managing user licenses for SaaS BC

Finance

- Create Fiscal Year
- Updating previously submitted periods
- How to adjust or extend Accounting Periods
- Which G/L accounts should not have direct posting allowed?
- Posting Reversing Journals
- Finding Linked Documents
- "Nothing to post" Error on Reversing Journals

Sales and Purchasing

7.3. Product Focus

When new products are released that we think that you might be interested in, or if there is a special offer, we will highlight them here:



sana
PRESENTS:
The official e-commerce for
Microsoft Dynamics 365 Business Central

Sana Commerce
Product Focus

Sana Commerce professional e-Commerce solutions for Business Central and NAV.

Sana Commerce

7.4. Training Portal



Training Areas



The training portal is perfect to brush up on your Product Knowledge. The training videos allow you to learn or even brush up your knowledge on a wide range of subjects. Pick a subject area and click on the button:

Training Areas

<p>Master Data</p> <ul style="list-style-type: none"> Explore contact master data Review customer master data Explore vendor master data Get to know the item master data Deleting master data How to handle personal data <p>Handling Master Data</p>	<p>Financial Management Setup</p> <ul style="list-style-type: none"> Introduction to setting up number series Assign a number series Set up and assign specific posting groups Set up and assign inventory posting groups General posting groups Configure the general posting setup Dimensions <p>Financial Management Setup</p>	<p>Introduction to Chart of Accounts and Journals</p> <ul style="list-style-type: none"> Set up general journal templates General Journal batches Creating Journal entries Process Journal entries Standard Journal Reverse Journal entries Recurring Journals Introduction to Chart of Accounts <p>Intro to COA and Journals</p>	<p>Invoicing customers</p> <ul style="list-style-type: none"> Invoicing Customers Invoicing a sales order Invoicing multiple shipments Prepayment No. series Assigning prepayment percentages Process prepayment invoices <p>Invoicing customers</p>
<p>Financial Reporting</p> <ul style="list-style-type: none"> Intrastat 	<p>Bank and Payment reconciliation</p>	<p>Purchase Documents</p>	<p>Stock Inventory and Item Planning</p>

This will then open up a list of training videos covering that subject.

Assign a number series	
Set up and assign specific posting groups	
Inventory posting groups	

8. News

Finally, links to recent e-shots, newsletters and blog articles can be found at the bottom of the page.

Recent News

We work hard to find a round-up of all of the latest news that will effect your business.



Dynamics Dispatch

We send useful information on our Dynamics Dispatch emails. Missed one? Don't worry, you can see the latest ones here:

- DD030 - Dynamics Changes 12 October
- DD028 - Dynamics Changes 28th June
- DD027 - Upcoming Dynamics Changes
- DD026 - Support Portal is Here
- DD025 - Dynamics Changes January
- DD024 - 2021 New Year Newsletter
- DD023 - Brexit Webinar
- DD022 - Brexit Questionnaire



Business Central Has a Breakthrough Year in 2021

Posted by Jesse Lawrence 21 Feb 2022



Microsoft looks back on investments after successful 2021

Posted by Jesse Lawrence 14 Feb 2022
Microsoft Dynamics 365, Microsoft Office 365



Implementing Business Central Big bang or multiple baby-steps?

Posted by Jesse Lawrence 07 Feb 2022
Microsoft Dynamics 365



Dynamics 365 Business Central is the fastest growing cloud ERP solution!

Posted by Jesse Lawrence 31 Oct 2021
Technology & Product, Industry, Accountancy, Microsoft Dynamics 365

9. Your Feedback

We improve by getting your feedback. If there are things that could work better for you, there are FAQs or training videos you would like to see, or if there is any other feedback that you would like to provide, please use the form on the support portal home page.

Portal Feedback

Please provide us with a review of your experience using the portal, any suggestions or feedback is welcome!

[Leave Feedback](#)