2026 EDITION

RUX

Product Guide

Vertical solutions, dashboarding, productivity, and automation Business Applications for Dynamics 365 Business Central.

www.ruxsoftware.com

Table of Contents

Extension Name	Page Number
RUX Rentals	4
RUX Service	5
Financial Dashboard	6
Sales Dashboard	7
History and Statistics	8
Warehouse Dashboard	9
Health Check	10
Invoice and Statement Delivery	11
Advanced Notifications	12
Advanced Accounting	13
Advanced Prepayments	14
Payment Plans	15
Advanced CRM	16
Project Management	17
Advanced User Management	18
Auto Create Dimensions	19
Consolidated Shipping	20
Distribution Control Center	21
Advanced Purchasing	22
ShipRush Integration	23
Advanced Assembly BOMs	24
Advanced RMA / Case Management	25
Advanced Document Numbering	26
Data Imports and Migration	27
Advanced Document Attachments	28
Advanced Descriptions and Pictures	29
TimeClock	30
Help Desk	31
Learning Management System	32
Dispatch Management	33
Advanced Item Tracking	34
Expense Sheets	35
Commissions Management	36
Advanced Cycle Counts	37
Coupons	38
Advanced Sales Orders	39
BC Toolbox Bundles	40

Over 200 5-Star Reviews in AppSource!

★★★★★

Derek D.

RUX Rentals

"**Excellent Product**
"I have been using Rentals for 2 years now in my business. This app coupled with BC does everything we need and will be able to scale with our business for years to come."

★★★★★

Jonah N.

Advanced Prepayments

"**Sales Lines not locked with Advanced Prepayments makes Prepayments easy.**
I love the freedom & flexibility that Advanced Prepayments provides; prepayments used to cause anxiety, but with this extension, it is nice & easy."

★★★★★

Joe C.

Financial Dashboard

"**Helpful AR Dashboard Metrics**
"I am new to BC but quickly realized the lack of "out of the box" dashboards and have found the Financial Dashboard Extension to be extremely helpful... specifically an easy-to-read visual representation of our Accounts Receivables."

★★★★★

Samuel B.

Warehouse Dashboard

"**Great and Powerful tool!**
Love the Warehouse Dashboard. It has helped give us great insights into our activity patterns at a glance. I also cannot speak highly enough about the inventory view, especially when paired with the History/Statistics tool. The warehouse dashboard has saved me significant time when researching our trends whether it be at the warehouse activity level or the item level."

★★★★★

Jennifer S.

Invoice and Statement Delivery

"**Excellent Product & Customer Service**
This invoice statement and delivery software has been a game changer for us. It has cut our invoice processing time in half, and has freed up hours in sending out statements and follow up invoices. On top of that, the support and customer service that you receive from ERP Connect Consulting is excellent. They will walk you through the setup and they are very quick to respond if you run into any issues."

★★★★★

Amanda B.

History + Statistics Dashboard

"**Incredible App, Incredible Company!**
"...Our office recognizes immediately that this app will be an absolute game changer in our day-to-day operations just after a short time of experiencing it. Previously time-consuming projects are now being completed much faster than expected. It offers so many great tools that will truly help with your reporting needs. We are so thankful to have found it!

RUX Rentals

MOST POPULAR

Business Central Gaps

- Unable to track rental unit availability and status
- Does not support inventory movement tracking for non-sale items
- Lacks functionality to manage utilization by group or unit, and to track maintenance costs
- Incapable of handling diverse rental billing terms

Our Solution

- View and manage equipment availability status in real time with an intuitive, graphical calendar
- Track rental equipment movements, transfers, and returns, including non-sale items
- Monitor equipment rental utilization by unit or group and log maintenance activities and associated costs
- Rent and sell equipment with flexible terms, including hourly, best price, prorated, or user-defined to match how your customers do business
- Save time with one-time or recurring rental invoicing from a single, easy-to-use screen

Quick Wins

- Create a rental contract, capture signatures and photos from the field, or look up availability of a product from any mobile device
- Allow overbooking and re-rent third party equipment, simplified with linked PO's
- Integrates with DocuSign
- Integrates with standard Business Central Project module

Other Features

- Drag and drop visualizations for fleet availability
- Real-time reporting across your rental operations
- Automatically create credit memos for early equipment returns
- Transfer units from one contract to another

Have You Said

- We want an easier way to manage equipment rentals, maintenance, and financials in Business Central
- We need Fixed Asset / Rental Linking

RUX Service

MOST POPULAR

Business Central Gaps

- Inability to manage preventative maintenance on company or customer assets
- Inability to capture signature with or without DocuSign
- Lacks advanced technician scheduling
- Lacks advanced budgeting features for upcoming and past services

Our Solution

- Manage preventative maintenance intervals for company and customer-owned assets
- Capture signature in the office or in the field via a mobile device
- Schedule a technician to a task or ticket
- Advanced warranty features

Quick Wins

- Compare actual costs to budgeted template costs
- Manage a maintenance shop, as well as short and long-term installations
- Integrates with DocuSign
- Visual Resource Scheduler

Other Features

- Give your employees instant mobile access from their phone, tablet, or browser to provide better service from anywhere
- Produce detailed multi-level service and maintenance templates by equipment type
- Send notifications to customers for upcoming service requirements

Have You Said

- We need a way to proactively manage our equipment service, maintenance, and inventory in Business Central
- We wish there were an easier way to track service jobs

FINANCIAL DASHBOARD

MOST POPULAR

Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting dashboards to display directly in BC

Our Solution

- 34 KPIs and Metrics out of box with minimal configuration required
- Everything is embedded directly into BC, so no need for external licensing
- One stop shop for visuals and quick data analysis in BC
- Full drill down capabilities on all data points in BC

Quick Wins

- Download and Immediately see AR/AP metrics with no configuration
- Sales, Inventory, and Cash Metrics out of box
- Sub-Ledger to General Ledger Balance Checks ready to go for quick monitoring

Other Features

- KPI views for Pipeline, Revenue comparisons, Margins and more
- AP/AR Aging pie charts by aging bucket
- Inventory value by Item Category/Location
- Sales by Global Dimension #1 and #2
- Cash Balance by Bank Account

Have You Said

- We want to start with embedded financial reporting before looking at external tools
- What dashboards does Business Central have built in already

SALES DASHBOARD

Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting dashboards to display directly in BC

Our Solution

- 25 KPIs and Metrics out of box with minimal configuration required
- Everything is embedded directly into BC, so no need for external licensing
- One stop shop for visuals and quick data analysis in BC
- Full drill down capabilities on all data points in BC

Quick Wins

- Download and Immediately see sales data broken out by Geography, Date, Item, and Dimension
- Download and Immediately see sales data broken out by Salesperson, Customer and Backorder

Other Features

- US and World Sales Bubble Maps
- Sales by Day, Week, Month, Year, etc.
- Sales by Global Dimension #1 and #2
- Sales by Item, Salesperson and Customer

Have You Said

- We want to start with embedded sales reporting before looking at external tools
- What dashboards does Business Central have built in already

HISTORY AND STATISTICS

Integrates with Rentals & Service!

Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting dashboards to display directly in BC

Our Solution

- 30 KPIs and Metrics out of box with minimal configuration
- Everything is embedded directly into BC, so no need for external licensing
- Full drill down capabilities on all data points in BC
- Globally Search your BC Database across all Sales Record types including Posted and Unposted Documents
- View filtered Records in a tree view with headers/lines with the ability to sort and add additional filters in your data grid

Quick Wins

- Download and Immediately see Customer, Vendor, and Item Statistics with no configuration
- See Sales, Purchase, and Quantity Trends across Customer, Vendors, and Items

Other Features

- Item Statistics like Quantity on Hand, Average Lead Time and Sales Price Trends
- Vendor Statistics like Purchases By Item Category and On Time Delivery
- Customer Statistics like Average Pay Days
- Enhanced Change Logs available directly on Master Data Cards/Records

Have You Said

- We want to start with embedded sales reporting before looking at external tools
- What dashboards does Business Central have built in already

WAREHOUSE DASHBOARD

Business Central Gaps

- No out of box dashboarding available in Business Central
- You must build everything from scratch for any sort of visualizations which can be costly
- Having external tools requires additional links for getting dashboards to display directly in BC

Our Solution

- 24 different visualizations
- Does not require anything to be built from scratch
- Everything is embedded directly into Business Central
- One stop shop for visuals and quick data analysis in BC
- Full drill down capabilities on all data points in BC
- Purchase Order and Sales Order dashboard with easy to digest information

Quick Wins

- Download and Immediately see Shipping, Receiving, Inventory, Vendor, Sales, and Purchase metrics with no configuration
- Purchase Order follow-ups from a centralized dashboard

Other Features

- Analyze Shipment/Receipt Dollars, Orders, and Lines to monitor activity levels
- Quickly monitor Adjustment and Cycle/Physical Counting Activity
- Analyze Vendor performance for on time delivery and overall performance

Have You Said

- We want to start with embedded operational reporting before looking at external tools
- What dashboards does Business Central have built in already

HEALTH CHECK

FREE!

Business Central Gaps

- No out of box dashboarding available in Business Central
- No ability to get system indicators/notifications for areas of improvement
- No ability to quickly scan multiple modules at the same time for reconciliation issues

Our Solution

- Quickly Analyze Subledger to General Ledger Balance Checks across all modules
- Quickly Analyze Customer Aging Statistics and Flag Late Payers
- Scan Sales and Purchase Documents for Documents that need to be cleaned up
- Identify Missing Posting Groups Setups and GL Mapping Issues
- Identify Missing Accounting Periods and Date Lock Setups
- Review Negative Inventory Warnings and Inventory Valuation/Statistics Metrics
- Review User License and Login Data, Job Queue Warnings, and Currency Setup Issues
- Review all Change Log Data and Retention Policies

Quick Wins

- Download and Setup in Under 5 Minutes
- Easily Identify Reconciliation Issues
- One Stop Shop for Review Across Multiple Modules

Other Features

- Reach out to our team if you would like to review your results and put together your personalized Business Central Report Card

Have You Said

- We want an easier way to reconcile AR and AP
- We are having difficulties reconciling our Bank Accounts
- We do not know where to start for process improvement projects

INVOICE AND STATEMENT DELIVERY

MOST POPULAR

Business Central Gaps

- Emailing Documents out of Business Central is manual and time consuming
- There is no easy way to bulk send or send immediately upon posting in BC
- No way to send automated Reminders, Statements, Payment Receipts, or Recurring Invoices

Our Solution

- Automatically send Sales Documents upon posting
- Send Statements and Invoice Reminders automatically
- Ability to skip send on post and send later from a dashboard
- Schedule Documents to send on a daily, weekly, monthly, or on a user defined schedule from a pre-created job queue
- Auto email AR Aging internally on a daily basis
- Rich text HTML email templates give more flexibility and company branding in all Customer and AR emails

Quick Wins

- Enable Documents to send on post
- Customize email subject and body with company branding
- Auto email AR Aging Report to your inbox
- Schedule Statements and Reminders to auto send

Other Features

- Update Posted Document fields such as Customer, Address, Dates, Payment Terms, External Document, Salesperson, GL Accounts, and Comment Lines
- Create Recurring Orders and Invoices for easier Recurring Billing management

Have You Said

- I want an easier way to send Invoices to Customers automatically
- Is there an easier way to send Past Due reminders to my Customers
- Recurring Invoicing is such a hassle

ADVANCED NOTIFICATIONS

Business Central Gaps

- No ability to add Pop Up Notes for Customers, Vendors, and Items
- No ability to add On the Fly Notes to transactions and create a workflow to the tagged users
- No ability to tag individuals or groups directly in Business Central with automated emails

Our Solution

- Rich Text HTML Notes for Customers, Vendors, Items, Purchase/Sales Documents, and Production Orders
- Notes that trigger based on event occurring in system (ex. Credit Limit is Exceeded or Job Queue Fails)
- Ad Hoc Notes that give users the ability to tag other users/groups on Purchase/Sales Docs, Master Data Records and Production Orders on the fly
- Notes that are automatically emailed to a user/group with a link to the exact record in BC the note was created on

Quick Wins

- Add to Rich Text HTML Pop up Notes to Customers, Vendors, and Items
- Automatically add Pop up Notes to Purchase/Sales Documents and Production Orders

Other Features

- Ability to view "My Notifications" on the BC Role Center
- Ability to auto-save and copy the note to the individual transaction in Pop Up Notes
- Ability to block emails/exclude users from receiving notifications where necessary

Have You Said

- We are looking for easier ways to be notified about activities that are occurring in our system
- We want our Pop Up Notes to also be saved on the transaction

ADVANCED ACCOUNTING

Business Central Gaps

- No ability to easily deliver reports via email in out of box Business Central
- No easy way to see remittance information after Vendor Payment Journals have been posted
- Checks in BC do not have features around signature generation and printing thresholds

Our Solution

- Advanced Accounting gives the ability to deliver Excel based reports directly to your inbox on a daily basis
- Ability to view posted Payment Journal Remittance information on an easy to view dashboard
- Enhanced check printing with custom signatures and signature threshold capabilities when printing based on the check amount
- Vendor Default Purchase Lines available directly on the Vendor Card for quick setup and utilization

Quick Wins

- Immediately schedule reports to start being delivered into your inbox
- Immediately start viewing data on the ACH Payment Dashboard
- Start utilizing Vendor default purchasing lines right on the Vendor Card

Other Features

- Dashboard that allows you to expand into multi-dimensional trial balance view
- Ability to see on both Documents and Posted Documents LCY at a line level

Have You Said

- We want Excel reports delivered to our inbox on a daily basis
- We want the ability to see ACH information after the Vendor Payment Journal has been processed

ADVANCED PREPAYMENTS

MOST POPULAR

Business Central Gaps

- No out of box Prepayments functionality at the Customer or Vendor Cards Level in BC
- No easy way to manage document changes once prepayments have been issued
- No ability to issue multiple prepayments against a single document in Business Central

Our Solution

- Customer Prepayments, Deposits, and Retainers built natively into BC at a Customer and Vendor Card level that can be used across multiple documents
- More flexibility when managing changes to Sales and Purchasing Orders/Invoices after Prepayments have been issued
- Prepayments now available at a Job level
- Ability to view AR/AP dashboard for Customer/Vendor Prepayment Balances to view activity and remaining amounts
- Customer and Vendor Prepayment Dashboard will also show the full prepayment activity for selected Customer/Vendor

Quick Wins

- Create Customer and Vendor Deposits and Retainers
- Start utilizing Advanced Prepayments on Sales Orders/Invoices, Purchase Orders/Invoices, and Jobs
- Take Advantage of Increased Flexibility

Other Features

- Ability to exempt an order from using Prepayment funds on a transaction by transaction basis
- Order Lines are no longer locked down after the Prepayment is issued

Have You Said

- We need multiple prepayments per order
- Updating order lines after prepayments have been issued is very manual
- We are unable to do Customer/Vendor level deposits and retainers

PAYMENT PLANS

Business Central Gaps

- No way to do Payment Schedule for a Customer or Vendor
- No visibility into AR Aging and Cash Forecast for Customer Payment Plans in BC
- No way to change Payment Schedule on posted Sales Invoice

Our Solution

- Create Installment Payments for Sales Orders and Invoices
- Create Installment Payment for Purchase Orders and Invoices
- Utilize Payment Terms to create payment plans for Purchase and Sales Documents
- Payment plan will result in multiple installment payments from Sales and Purchasing Documents

Quick Wins

- Immediately create Payment Plans on posted Invoices
- See multiple ledger entries that are created from the plan

Other Features

- Resulting Ledger Entries will have one Customer/Vendor Ledger Entry per payment plan line
- Individual installments can be closed out individually on their ledger entries

Have You Said

- We want to be able to do Scheduled Payments for our clients
- We want to be able to change Payment Schedules on Sales Invoices already posted

ADVANCED CRM

MOST POPULAR

Business Central Gaps

- Only one Contact Card type that can't be broken up into different stages of the sales process
- No easy way to track Tasks, Calls, Emails, Meetings and Notes directly in the Contact Card
- No sales rep and manager-focused dashboards and reporting

Our Solution

- Lead, Opportunity, and Customer Contact cards that allow sales reps/managers to track their pipeline
- Enhanced Task Tracking and Activity Logging directly in enhanced Contact Cards and visible on Contact timeline
- Sales rep and manager dashboards to track pipeline, revenue (any date range), win/loss reasons, and activities
- Estimates that allow unique Item creation and don't require contacts to be a Customer

Quick Wins

- Immediately start creating Leads and Opportunities and converting them to Customers directly in BC
- Create Tasks, Log Emails, Log Calls and Log Meetings directly in the Contact Card

Other Features

- Ability to send emails directly from the Contact Card and create plug-and-play templates
- Simple checklists to assist with workflow and tracking
- No external integrations needed

Have You Said

- We want more than just one type of Contact Card to track our prospects
- We want to see how many of our reps are meeting quota and conduct pipeline meetings

PROJECT MANAGEMENT

Business Central Gaps

- Jobs can be over complicated for clients that don't need complex WIP reporting
- An admin creates all timesheets each week for users, instead of the user creating their own
- No easy way to follow up with Vendor on a Purchase Order you are waiting on for a Job

Our Solution

- Easily manage Project phases and Tasks for a Project with Time Frames, Estimates, and Actuals
- Track Project time and billing in time sheets
- Enable Project calendars, Gantt charts, and additional Project reporting for managers and team members
- Users can create their own timesheets and also record time directly from a Project Task itself
- The Project card includes visibility directly on the card for phases and tasks

Quick Wins

- Setup a new Project that automatically creates a Project Dimension for you
- Start using dimensions on Purchasing and Sales documents to track project activity

Other Features

- 5 different billing options on how you would like the Sales Invoice to appear to your Customer for the Project
- 2 financial reports that are automatically filtered to the Project Dimension

Have You Said

- We want a simpler way to track and manage our Projects in BC
- We want better reporting on our new and in-progress Projects

ADVANCED USER MANAGEMENT

Business Central Gaps

- No ability to restrict a user's visibility by Master Data filtering like Customer or Vendor
- No way to filter a users view based on a range of dimension values
- No easy way to block AR, AP, or GL balances on specific users

Our Solution

- Ability to restrict user access to just certain Customers, Vendors, Posting Groups, Dimensions, and GL Accounts
- Ability to block user's visibility to AR, AP, and GL Balances
- More control around Item cost visibility and posting Inventory Journals and Adjustments
- More granular control over which Dimension values a user can select and post to on new and existing transactions
- More granularity when users are viewing Sales, Purchasing, and GL Data

Quick Wins

- Add users and start restricting the data they can see within their available data sets
- Have users test their filtering views
- See the global filters applied (that the user cannot undo) in data lists

Other Features

- Can define by Customer individually or their Customer posting group
- Can define by Vendor individually or their Vendor posting group
- Dimension and GL View Restrictions

Have You Said

- Do you have a way in BC to restrict access to table records for certain users
- We want to limit access for our users to just certain Customers, Vendors, Posting Groups, Dimensions, etc.

AUTO CREATE DIMENSIONS

Business Central Gaps

- No ability to take Master Data & report on it from the GL or keep in sync with Dimension values
- No ability to report on Sub-ledger data like Customer, Vendor, and Item directly from the GL
- No easy way to export/aggregate data based on Sub-ledger components from GL postings

Our Solution

- Link Master Data records so that Dimension values are created/updated to maintain data sync and integrity
- Report on Customer/Vendor/Item/etc. data from the GL by creating a link to the Dimension value records
- Ability to set the Dimension as required if needed with out of box Dimension options (Same Code, Code Mandatory, No Code)
- Ability to lock default Dimensions and document Dimensions so that users cannot break the automated links

Quick Wins

- Link one of the ACD options to a Dimension of your choice and see how creating and updating will sync to Dimensions
- Recalculate Dimensions after setup to do a 1 time Master Data sync

Other Features

- For clients that implement ACD after go live, there is the ability to "recalculate Dimensions." This will back fill all Dimension values from existing Master Data lists

Have You Said

- I wish I could see my Customer, Vendor, or Item data directly in my GL
- Business Central has too many clicks to see which Master Data record this GL entry came from

CONSOLIDATED SHIPPING

Business Central Gaps

- Processing and visibility of Consolidated Shipments from multiple orders is difficult in BC
- No easy way to print standard Documents for Shipments (Commercial Invoices, BOL, etc.)
- Notifications when Shipments go out do not exist in out of box Business Central

Our Solution

- Ability to consolidate multiple Orders into one Shipment
- View the Consolidated Shipment in one click from any Sales Order that is included
- Option to consolidate Invoices or Invoice Orders Separately
- Ability to attach pictures to Shipments
- Central location to print Shipping Checklists, Master Packing Lists, Package Labels, Pallet Labels, Bill of Lading, Commercial Invoice, HTS Commercial Invoice, Certificate of Origin and Certificate of Compliance

Quick Wins

- Access to 9 standard Shipping documents, easy to include or exclude them on an Order by Order basis
- Automatic notifications when Shipments go out
- MSO dashboard to handle all Shipments from one central location

Other Features

- Flexibility on Freight Charges and Freight Markup
- Track results of Shipments (date of arrival, delivery result, late delivery reasons, claims)

Have You Said

- We need the ability to combine multiple SOs into one or more Shipments
- We need to print Commercial Invoices or Bills of Lading

DISTRIBUTION CONTROL CENTER

Business Central Gaps

- Tough to manage Pick, Pack and Ship from an SO in BC without using Warehouse Docs
- No ability to automatically release to Warehouse when a Sales Order is released
- No easy way for Sales, Customer Service, and the Warehouse to sync and communicate

Our Solution

- Ability to streamline the Pick, Pack, and Ship process directly from Sales/Customer Service to the Warehouse
- Ability to automatically release Sales Orders to the Warehouse when the Sales Order is released
- Streamlined Purchase Receiving functionality that allows you to add attachments, pictures, and receiver notifications
- Ability to do on the fly Cycle Counts and Inventory Adjustments from handheld devices

Quick Wins

- Auto release to Warehouse workflow
- Item Inquiry and Item Transfer Workflows
- Purchase Order Receiving
- Cycle Counts

Other Features

- Ability to do ad hoc Item inquiries directly from a handheld device
- Print Product Labels
- Ability to work with Business Central and Distribution Control Center from your tablet, phone, or other handheld device

Have You Said

- I need an easier way to work end to end with my Shipping and Receiving departments
- I need a better way to do Item Lookups out on the Warehouse floor

ADVANCED PURCHASING

Business Central Gaps

- No out of box email templates for Vendor communications in Business Central
- You have to manually add Vendors to the Vendor Item Table on the Item Card
- No way to automatically calculate Vendor Lead Time or Item Reorder Points
- No ability to create and generate recurring Purchase Orders/Invoices

Our Solution

- Setup email templates for Quotes, Orders, Invoices, Return Orders, and Credit Memos
- Auto populate data in the Vendor Item Table each time a new combination is used. This data also flows through to fact boxes on POs, PQs, and the Item Cards
- Automatically calculate Vendor Lead Time, Vendor Item Lead Time, minimum/maximum Inventory Levels, and Item Reorder Points
- Automatically create Item Stock Keeping Units

Quick Wins

- Only configuration required is for email templates and parameters for the auto calculations
- Tag attached Documents to Purchase Documents to automatically include them in Vendor Communications

Other Features

- Automated follow ups for past due Purchase Orders
- Enhanced ability to generate and email Purchase Quotes directly from a Job, Production Order, Sales Quote, or Sales Order
- Recurring Purchase Orders and Invoices

Have You Said

- We want to generate Quotes directly from a Job, Production Order, Sales Quote, or Sales Order
- How can I follow up with Vendors for past due Purchase Orders

SHIPRUSH INTEGRATION

Business Central Gaps

- No out of box way to integrate Shipping via Sales Order inside of Business Central
- Tough to push SO information over to Shipping Carriers (UPS, FedEx, etc.) automatically
- No way to automatically integrate Freight Cost and Tracking Number data back into BC

Our Solution

- Easily integrate Sales Order information to ShipRush (Utilizes popular providers like USPS, UPS, FedEx, and DHL)
- Pull back Freight Costs from ShipRush with the ability to mark up Freight
- Pull back the tracking number from ShipRush to the BC Sales Order for Quick Reference and Customer Inquiry
- Fulfill Orders in Business Central that are ready to ship
- Print Packing Labels and Packing Slips for your Shipments as part of the ShipRush integration process

Quick Wins

- Add Freight Line on Post
- Set Freight Markup Percent
- Pull tracking numbers back in to Business Central with bi-directional integration capabilities

Other Features

- Bi-Directionally integrate data between ShipRush and Business Central
- Allows Freight Collect on Customer Accounts if needed

Have You Said

- We need to rate shop and integrate rates, markups, and tracking numbers in BC
- Our Sales Order shipping process is very manual and involves multiple applications

ADVANCED ASSEMBLY BOMS

Business Central Gaps

- No ability with an Essentials license to utilize Variants in BOMs
- No ability with an Essentials license to do multiple Locations and Location defaults on BOMs
- No ability with an Essentials license to do phantom BOMs that won't be stocked in Warehouse

Our Solution

- Advanced Assembly BOMs gives you the ability to do all of the above with just an Essentials license
- Have the ability to have different Assembly BOMs based on variants of the parent and Sub-assembly Items
- Ability to default the location that the component is going to be pulled from on an Order that can be different than the header
- Ability to disassemble components on the BOM and put them back into Inventory at time of creating the Assembly

Quick Wins

- Start creating BOM Build-outs with Variants, Locations, and start/end dates in your Item's BOM
- Mark Sub-assemblies as Phantom BOMs to avoid needing stock before utilizing on an Assembly

Other Features

- Ability to utilize phantom BOMs for Sub-assemblies that need to be created but will never be stocked
- All functions available without using production orders or premium license

Have You Said

- We need to define BOM Locations, Variants, and/or start and end dates, but don't need a Premium license or Production Orders
- We have Sub-assemblies that aren't stocked and find it hard to use Assembly Orders

ADVANCED RMA/ CASE MANAGEMENT

Business Central Gaps

- No easy process to track Customer and Vendor Returns in out of box Business Central
- No way to track any internal or external communications related to Customer and Vendor Returns in BC

Our Solution

- Generate Return Material Authorization (RMA) cases from Posted Sales and Purchase Invoices to track Customer and Vendor Returns
- RMA will populate with all required info from the Posted Document (Customer/Vendor, Cost/Price, Dates, etc.)
- Communicate with Customers and Vendors using email templates and send automatic notices for Return Receipts, Vendor Credits not received, and RMA Close
- Email RMA forms to Customers and request to Vendors

Quick Wins

- Provide Greater Insights on Returns by Leveraging out of box Return Orders
- Utilize drag-and-drop Functionality to start processing a new return
- Flag attached documents to be included in email communications

Other Features

- Provide timeline of communication that automatically updates as case is processed
- Process the disposal of Damaged Goods from Customers and issue replacements
- Create Sales & Purchase Return Orders to facilitate Receiving/Shipping

Have You Said

- We want a better way to track our Vendor and Customer Returns
- How can I communicate critical information during the Sales and Purchase Return process

ADVANCED DOCUMENT NUMBERING

Business Central Gaps

- No easy ability to sync unposted and posted Document Numbers
- Tough to have the Quote, Order, and Invoice all sync the base number with an appended value
- No ability to prepend the year of the Doc as the starting point for the Document Number

Our Solution

- Sync unposted and posted Document numbers (huge win when it comes to bi-directional integrations)
- Ability to have Sales and Purchase Documents sync the base number plus a sequence at the end (-01, -02, etc)
- Ability to prepend the year as the starting number for the document with a 4 to 7 digit Document number to follow
- Ability to also use Order number plus sequence on Transfer Order Receipts and Shipments

Quick Wins

- Activate Sales and Purchase Posting Options for number syncing activation
- Select how you want to prepend year or append series to Sales and Purchasing Documents

Other Features

- Year can be affixed to Sales or Purchasing Transactions for easy searchability
- Added numbering functionality to auto number new customer ship to addresses

Have You Said

- We need our unposted and posted Document number to be in sync for bi-directional integrations
- We want our posted Invoice Number to match our Quote and Order number

DATA IMPORTS AND MIGRATION

Business Central Gaps

- Large data loads are slow when loading with edit in Excel and configuration packages
- Go Live data migrations for open AR, AP, and GL do not have a standardized import template
- Clients typically do not budget enough time for data migration efforts

Our Solution

- Our imports simplify the edit in Excel or configuration package process
- Process data 90% faster than using Configuration Packages
- We provide canned templates for open AR, AP, and GL transactions

Quick Wins

- Quickly Import Open AP, AR, and GL entries into the General Journal
- Utilize our standard import template to get started with converting your data

Other Features

- This creates a better experience for clients and consultants when migrating data
- Reduce time spent and make cutover activities more streamlined

Have You Said

- It takes too long to load data in via configuration packages and edit in Excel
- We have over 5000 rows of data we are importing and it is taking too long to load

ADVANCED DOCUMENT ATTACHMENTS

Business Central Gaps

- No convenient drag-and-drop to attach Documents in Business Central out of box
- Attached Documents are stored in the internal database (limit of 80 gigabytes)
- Additional storage comes at a price
- Current document storage practices slow down your system

Quick Wins

- Utilize drag-and-drop feature on all Document attachment pages
- Offload Storage Costs
- Speed up Business Central

Our Solution

- Drag-and-Drop Documents anywhere there is a Document Attachment function
- Enhanced Document list and direct download from fact box (rather than going to the drill down page)

Other Features

- Ability to save and retrieve Documents from Azure Blob Storage (ABS) instead inside the Business Central Database
- Reduce Business Central Storage Fees by utilizing Azure Blob Storage

Have You Said

- We want an easy way to drag-and-drop Documents
- We want a more cost effective way to store our Documents in BC

ADVANCED DESCRIPTIONS AND PICTURES

Business Central Gaps

- Can only attach one picture on item cards
- No way to utilize Blob Storage as an Image Repository for Item Pictures
- Limited descriptions for Items and Sales Document Lines

Our Solution

- Attach unlimited pictures to item cards
- Maintain Item Pictures in Blob Storage and sync those pictures automatically into BC, including removing images, adding images, and updating images
- Add HTML formatted text (including bulleted lists, hyperlinks, tables, and formatted text) for descriptions on your items. This description flows through to Sales Docs, Purchase Docs, Service Docs, Jobs, and more

Quick Wins

- Download and immediately get the ability to attach unlimited pictures on item cards
- Custom Sales Document Layout for customer-facing advanced descriptions

Other Features

- Use Advanced Descriptions from the Item Card and modify as needed, or create Advanced Descriptions on a per-order or per-quote basis for each line in your document
- Printable on Customer Facing Documents

Have You Said

- We want to attach more than one picture on our item cards
- We need to use an external tool to maintain our item pictures
- We need our customers to have more clarity on the descriptions of the items they are purchasing

TIME CLOCK EXTENSION

Business Central Gaps

- No way in Business Central to record time
- No way to export time feed to external Payroll in BC
- No time link to Projects or Work Orders

Our Solution

- Allow users to clock in and clock out for Start/End of Day and Start/End of Breaks
- Allow users to book time to Projects, Work Orders, Service Orders, Production Orders, and Jobs
- Option to do auto-break recording for Lunch and Breaks
- Option to "Snap" times to 15 min increments
- Record other Time Entries for Vacation, Sick Day, etc
- Ability to approve Time Journals for Payroll submission

Quick Wins

- Immediately Clock In and Clock Out
- Immediate access to who's here/who's not Dashboard
- Export to Payroll Provider

Other Features

- Ability to see who clocked in for the day and who showed up late/early
- Submit Payroll for ADP and Gusto Payroll via Excel Export
- Book time from your computer, tablet, or phone where Business Central is available

Have You Said

- We want to track clock time without having to use a 3rd party tool
- We want an easy way to track our hourly and salaried employees

HELP DESK EXTENSION

Business Central Gaps

- No way to track IT support in out of box Business Central
- Third party Ticket systems don't integrate with BC

Our Solution

- Ability for IT Department to have Ticket system in BC
- Track Support, Maintenance, and Project Tickets
- Users can create Tickets directly from pages in BC, and the Tickets are linked to that page/record
- Support Agents can go directly to the page/record that the support was for
- Track Tickets to User and Devices to see historical trends
- Tickets have Rich Text descriptions including adding screen shots of errors

Quick Wins

- Users can start submitting Tickets immediately
- Begin to track analytics for your support
- Drag-and-Drop Functions

Other Features

- User has option to confirm completion of Ticket along with survey about performance of IT staff
- Manager Dashboard to analyze Ticket performance and activity levels to see trends
- Drag-and-Drop Email to Start a New Ticket

Have You Said

- We want an easy way to track recurring vs single case user issues with workstations or devices
- We want to see what issues are the most common in our business

LEARNING MANAGEMENT SYSTEM

Business Central Gaps

- No easy way to build training Courses for your team/community natively in BC
- No way to track who has taken what Courses or gotten training in Business Central
- No way to track testing and pass/fail on Courses

Our Solution

- Create Courses directly inside of Business Central
- Link Courses to common pages in BC to give easy access to training materials
- Course can be self-paced, classroom, or teams directed
- Courses can have a multiple choice test administered after completion of the Course
- Track user participation and allow for tracking Course certification by user

Quick Wins

- Ability to start creating Courses directly in Business Central
- Ability to Link Training Videos Directly to Pages

Other Features

- Auto schedule refresher class on anniversary of completion of the Course
- Track International Organization for Standardization (ISO) certifications

Have You Said

- We want an easy way to provide and track training for our users
- We want easy access to see what users are certified in certain Courses

DISPATCH MANAGEMENT

Business Central Gaps

- No way to manage Deliveries in Business Central out of box
- No way to assign routes and drivers to Sales Orders
- No way to do paperless sign-off from Customers on a Delivery

Our Solution

- Schedule, Track, and Administer the delivery of Sales Orders, Purchase Returns, and Transfer Orders along with the Pick up of POs, Sales Returns, and Transfer Orders
- Build Routes into your Dispatch Schedule to manage Deliveries on multi-truck Deliveries
- Assign Drivers to routes/dispatches and track their activity
- “Best Route” option for Dispatch with Google Maps
- Option to print Delivery Tickets or provide tablets to drivers to go paperless/capture signatures electronically

Quick Wins

- Schedule Deliveries to Customers directly in Business Central
- Schedule Pickups
- Create and Assign Drivers and Routes
- Optimize Delivery Routes

Other Features

- Contact Notifications when Customers are pending Deliveries while driver is on route
- Ability to post Shipment/Invoice and email Customer delivery results from driver tablet
- Deliver multiple packages/SOs at the same time with one Delivery Ticket/Signature

Have You Said

- We want to be able to do Delivery and Pickup tracking in BC
- We want to electronically capture signatures from the client

ADVANCED ITEM TRACKING

Business Central Gaps

- No ability to enter Lot Number directly on Purchase Orders and Sales Orders in out of box BC
- No easy way to generate Lot Number or Serial Number on Purchase Orders

Our Solution

- Auto Generate Lot Number and Expiration Date on Warehouse Receipts
- Auto Generate Lot Number and Expiration Date on Purchase Receipts
- Sync Serial Number from Purchase Order to Sales Order for Special Orders
- Auto Generate Serial Number Series on Sales Shipments

Quick Wins

- Enter Lot Numbers on Purchase Orders and Sales Orders

Other Features

- Auto Generate Serial Number Series on Purchase Receipt

Have You Said

- We want an easy way to enter Lot Number on Purchase Order Receipt
- We want an easy way to enter Lot Number on Sales Order Shipment

EXPENSE SHEETS

Business Central Gaps

- No current ability to track and reimburse expenses directly in Business Central
- No way to run said expenses through approval workflows
- No way to import credit card feed and tag and attach expense documents

Our Solution

- Employees enter their expenses directly in Business Central
- Employees can attach receipts to their individual expenses
- Create expense types which are user-friendly categories users will tag when entering expenses
- Expense Types will have an associated expense GL account and potentially a revenue account (if billable to customers)
- Expense Approvals with email notifications

Quick Wins

- Setup Expense Types
- Add Receipt Attachments to Expenses
- Create Reimbursable Expenses and Pay Employees

Other Features

- Expenses can be marked reimbursable if using a personal card or corporate if the expenses have been company paid
- Expenses can be tied to our Project Management Module to be shown in Project Cards and Billed to Projects

Have You Said

- I need an easier way to track and reimburse expenses in Business Central
- I need the flexibility of recording corporate cards and personal cards
- I need to keep receipt copies for expenses

COMMISSIONS MANAGEMENT

MOST POPULAR

Business Central Gaps

- Business Central does not offer robust commissions tracking functionality
- Commissions calculations are not flexible or easy to use in Business Central
- External Reporting is typically required to track Commissions in Business Central

Our Solution

- Commissions Matrix - The engine of the app allowing users to define commissionable criteria that will be applied to lines includes salesperson, posting groups, dimensions, item categories, territory, and more!
- Commission Journals - For each sales document line pending commissions will be calculated and posted to journals when the sales documents are posted
- Commission Ledgers - Record of all posted commissions

Quick Wins

- Create commissions rules and a commissions matrix
- Create sales orders to verify commission rules are flowing through based on your commissions matrix

Other Features

- Auto Calculation - As as sales are updated, the app will automatically recalculate the pending (or expected) commission amount
- Commission Payment Journal - a record of all remaining commissions that are to be paid out to your employees/vendors

Have You Said

- BC Commissions is too basic for our needs
- We need more robust commissions tracking and payment reconciliation
- We don’t like calculating Commissions outside of Business Central

Advanced Cycle Counts

Business Central Gaps

- Manual calculation/maintenance of Phy. Inventory Period Codes (how often to count items)
- No way to schedule and monitor that cycle counts are being done in a timely manner
- Cycle Counts require users to generate journals, manually enter counts, and then post in a batch
- No way to do statistical analysis or notifications on what items are always out of balance

Our Solution

- Function to auto calculate Phy. Inventory Period Codes based on Inventory Value or Percent of Sales (or custom)
- System will automatically calculate proper mix of Weekly, Monthly, Quarterly, Bi-annual and/or Annual counts
- Schedule is created for each company working day so that counts can be managed and monitored properly
- Full Cycle Count Dashboard lets you easily analyze your best and worst items by accuracy metrics

Quick Wins

- Manage your Company Calendar to establish "Count Days"
- Calculate number of counts needed per year, and establish how many counts needed daily
- Set Phy. Inventory Period Codes and Schedule complete year's counts (typo)

Other Features

- Notification function for over/under counts to management to review
- Ability to properly count Location/Bin as well as Lot/Serial No. easily
- Each Item/Location/Bin is counted and posted separately, allowing you to count while other activity is occurring

Have You Said

- It is difficult to schedule and analyze cycle counts in Business Central today
- I am not sure how to see counts that are scheduled for today and who is supposed to perform them
- It is difficult to record and post counts and we need blind cycle counts

Coupons

FREE!

Business Central Gaps

- No easy way to reduce an item amount without using a Line or Invoice Discount
- Business Central does not allow for Item, G/L, and Resource filters for discounts
- No single-use discounts
- Business Central does not allow users to set a Max No. of Uses a discount can be used

Our Solution

- Apply a Start Date and End Date to each coupon
- Indicate if the coupon is for an amount or if it is for a percentage discount
- For each coupon, you can indicate if you want to include Items, G/L Accounts, and/or Resources in the Order amount (i.e., if you want coupon to apply to only items, not lines like freight or surcharges)
- Set Max No. of Uses for the Coupon that will deactivate it when reached

Quick Wins

- Select the Coupon Code on the Header of Sales Docs to apply a discount that meets the desired parameters
- Apply multiple Coupons per document (if needed)
- Quickly and easily track how many Orders and Invoices the Coupon has been applied to

Other Features

- Specify if there is a minimum order amount to apply to (i.e. 10 % off orders over $100)
- Coupon amount (Percent coupons) will recalculate on release of the sales order, and posting of the invoice
- Coupon Code is then tracked on Sales Documents and Posted Invoices to do usage analysis

Have You Said

- I wish there was an easier way to apply multiple discounts to an order
- Why can't I create different discount percentages and amounts for various Items, G/L Accounts, and/or Resources

Advanced Sales Orders

Business Central Gaps

- Very cumbersome to manage Special Order items, including doing Special Order on items that normally are stock items
- No way show/hide columns and fields on a Sales Order and then share that across multiple users.
- No way to see on each line of a sales order, what is its status in the workflow, especially special order items, without manually looking at each line
- No way to Split/Merge Sales Orders
- No way to see Inventory Status by location/bin easily on a sales order
- No way to see Sales and Purchase History for an item on a sales order
- No way to do Counter Sales (bar code scanning along with Cash and Carry options)

Our Solution

- Option to create "Views" of your Sales Orders, and then share across all your users (vs. having to personalize for each user individually)
- Special Order functions built into the Sales Order page to allow you to create all needed POs right from Sales Order Page
- Easily see the status of each line (stock and special order) via enhanced fields and Line Color options
- Added Counter Sales Page to add items via bar code scanning, and do Cash/Carry, On Account, and Setup Delivery for Retail Counter

Quick Wins

- Review/Adjust our 5 predefined Views and then assign across all your users
- Reduce your process time for Special Orders in half or more
- Give access to sales to see on hand inventory and Sales/Purchase History right on the Sales Order Page

Other Features

- Options to setup up different colors on the lines to represent different statuses of each line, including Low Margin warning
- Option to check Margin level and require approval before proceeding (including email of Margin Report to manager)

What Our Clients Say

- Processing Special Orders is very time consuming and difficult to track through the process
- I need the ability to quickly define order line issues
- Seeing stock levels at the time of creating a sales order across multiple locations is difficult and time consuming. We wish there was an easier way

BC Toolbox Bundles: Buy More Save More

EXTENSION NAME	DASHBOARD	ESSENTIALS	UNLIMITED
Financial Dashboard	✓	✓	✓
Sales Dashboard	✓	✓	✓
History and Statistics	✓	✓	✓
Warehouse Dashboard	✓	✓	✓
Health Check	✓	✓	✓
Invoice and Statement Delivery		✓	✓
Advanced Notifications		✓	✓
Advanced Accounting		✓	✓
Advanced Prepayments		✓	✓
Payment Plans		✓	✓
Advanced CRM			✓
Project Management			✓
Advanced User Management			✓
Auto Create Dimensions			✓
Consolidated Shipping			✓
Distribution Control Center			✓
Advanced Purchasing			✓
ShipRush Integration			✓
Advanced Assembly BOMs			✓
Advanced RMA			✓
Advanced Document Numbering			✓
Data Imports and Migration			✓
Advanced Document Attachments			✓
Advanced Descriptions and Pictures			✓
TimeClock			✓
Help Desk			✓
Learning Management System			✓
Dispatch Management			✓
Advanced Item Tracking			✓
Expense Sheets			✓
Commissions Management			✓
Advanced Cycle Counts			✓
Coupons			✓
Advanced Sales Orders			✓
EFT *New!*			✓
Inter-Company *New!*			✓
Advanced Payables *New!*			✓

RUX Rentals and RUX Service are not included in BC Toolbox Bundles.

A Few of Our Strategic Partners

Ensure a Successful ERP Project with Our Strategic Partners!

4th Quarter Solutions
ace Micro
Admiral Consulting Group
Alta Vista Technology
ArcherPoint by Cherry Bekaert
BDO
boyer... Empower your data
Callow & Associates Management Consultants Inc.
Crestwood Associates
Dorado Solutions accelerating your business
InovateNow Inovate, Connect, Grow.
Innovia Consulting
Joe software Works for people
JourneyTeam
L&L Consulting
momentum Software Solutions Take your business to the next level
professional advantage
sabre
Solutions+
Stoneridge software
Velosio
Volt Technologies
Western Computer
wiise

RUX

Become a Partner:

Product Guide

RUX engineers Business Applications that strengthen businesses to operate with ironclad integrity, today and tomorrow.

Ready to see your assets and inventory in a clearer light?

www.ruxsoftware.com