

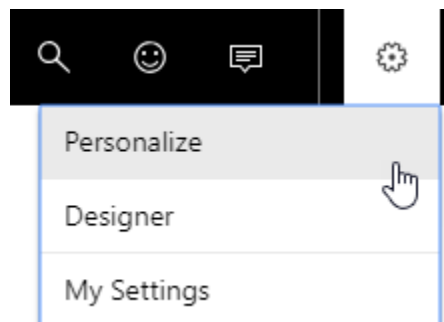
# Customize and personalize 365 for Transportation.

Within transportation companies, there is a lot of information available. However, it not always necessary to see al this information to do your work correctly. For this reason you can change your Company and/or Role. Next to this adjustment, you can customize your environments to your own preferences. This help guide will show you how.

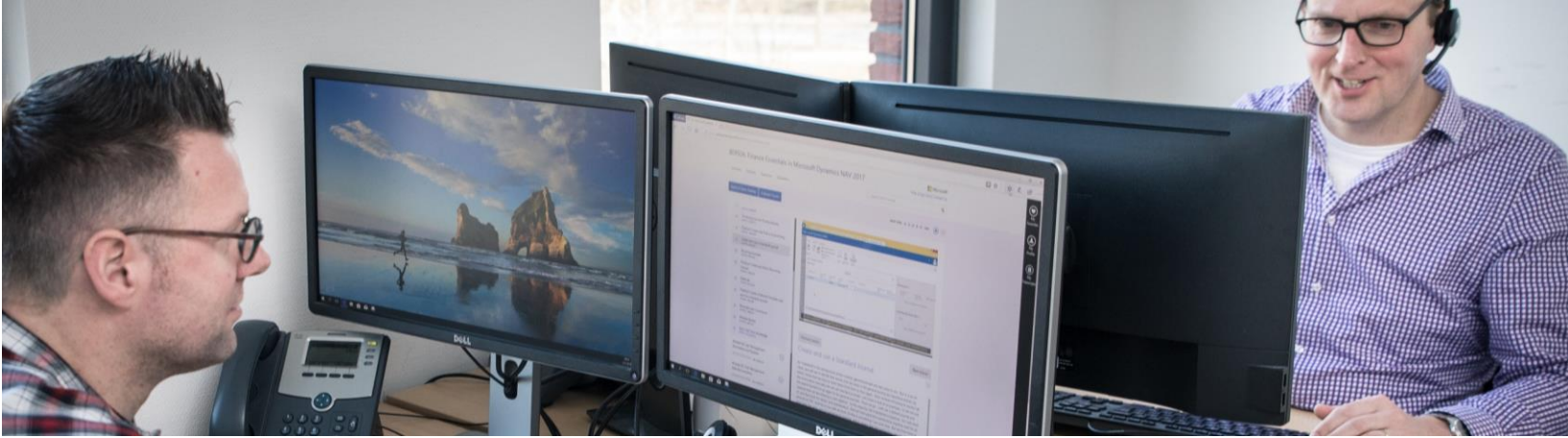
No matter which screen you see, there is a personalization option. You can find it in the top right corner, under the settings wheel.



Clicking on the wheel will show the pop-up below. Click on Personalize to go to the next step.



Now, your environment is ready for personalization. You can see that the Personalization mode is on in the top center of your screen. Also, by moving your cursor over several fields, red lines appear around them. This means they are editable.



Dynamics 365 Business Central

Logistics Inc. | Master Data | Documents | Posted Document | Personalizing: Role Center | Done | More

Orders | Trips | Customers

ACTIONS  
> New Order

Insights

Activities  
CREATE  
+ Order | + Sales Invoice | GET STARTED  
▶ Replay Getting Started

Power BI Reports  
An error occurred while trying to get reports from the Power BI service. Please try again or contact your syste...

My Plan Departments

| PLAN DEPARTMENT NO.                     | PLAN DEPARTMENT LINE NO. | DESCRIPTION |
|---|--------------------------|-------------|
| (There is nothing to show in this view) |                          |             |

Business Assistance  
Top Five Customers by Sales Value

Report Inbox

| CREATED DATE-TIME | DESCRIPTION   | OUTPUTTYPE |
|-------------------|---------------|------------|
| >0000             | Trav Research | 2,345,63   |

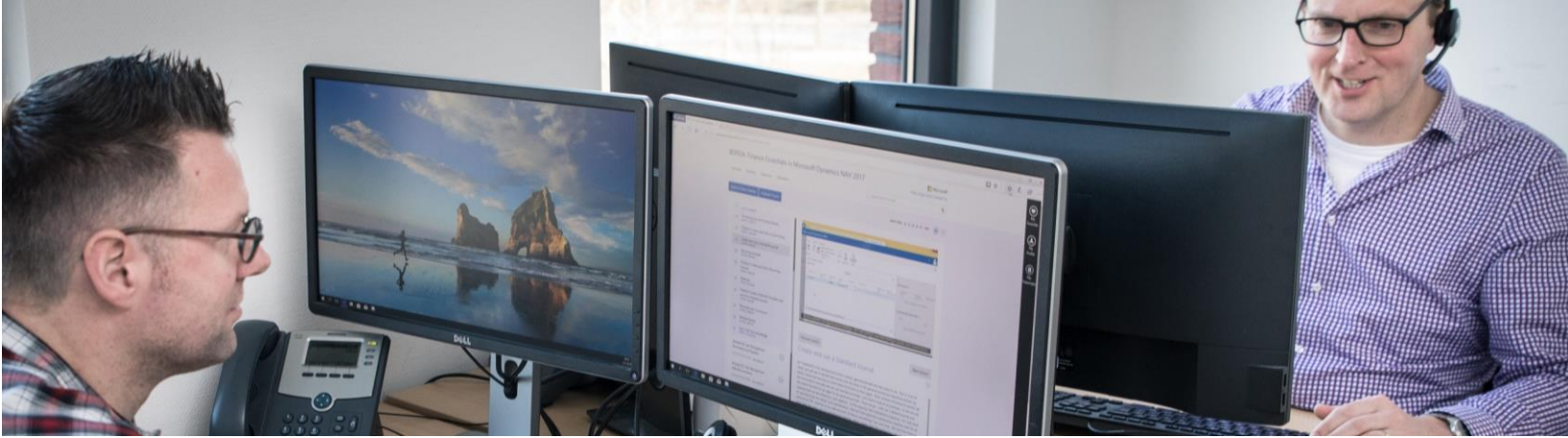
Clicking on the red arrow will give you the options to either move or hide the box. If you choose to move it, you can drag and drop the entire box at the desired destination.

Business Assistance

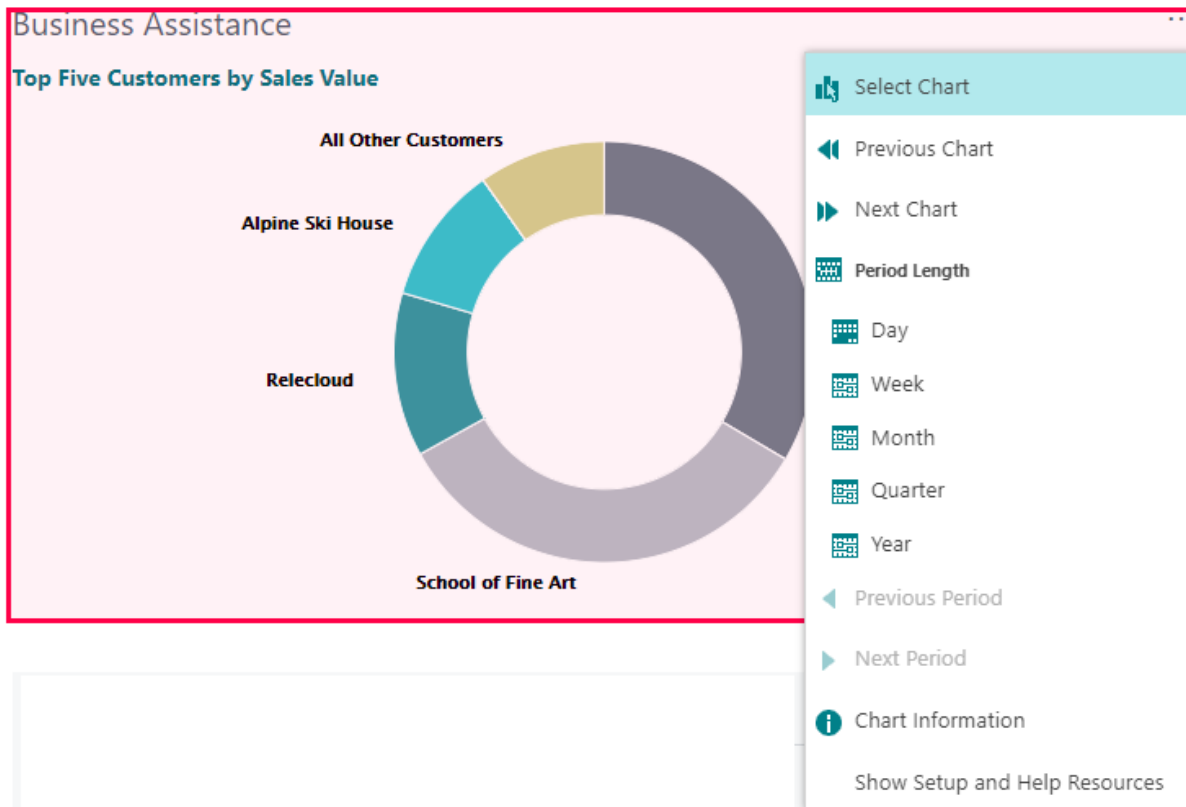
Top Five Customers by Sales Value

Move  
Hide  
Clear personalization

You can also press on ..., this will give you some other options, as you can see below. You can replace the chart with



another chart or finetune the current chart. Do you want an overview per week or per year? Or is this chart not necessary for you? These options will help you to find the right Role Center for a perfect workday.



That was the example for your Role Center. If you want to personalize specific screens, like your Addresses (under Master Data), you have the possibility to edit the table/chart/graph to your personal desires. As you can see below, you can freeze, move or hide a pane. Adding panes is also possible when personalizing Master Data environments.

Logistics Inc. | Master Data | Documents | Posted Documents | Personalizing: Addresses | Done | More

Addresses: All | Search | + New | Manage | Status | Page | Show all

| NO.      | STATUS       | NAME                        | ADDRESS               | CITY      |                         | POST CODE  | COUNTRY/RE...<br>CODE | E-MAIL |
|----------|--------------|-----------------------------|-----------------------|-----------|-------------------------|------------|-----------------------|--------|
| A0000002 | 20-CONFIRMED | Fresh Logistics Rotterdam   | Kellestraat 9c        | Rotterdam | Set Freeze Pane<br>Move | 3029 BP    | NL                    |        |
| A0000003 | 20-CONFIRMED | Amsterdams Shipyard         | Seepoort              | Amsterdam | Hide                    | NL-1009 AG | NL                    |        |
| A0000004 | 10-NEW       |                             |                       |           |                         |            |                       |        |
| A0000005 | 15-MODIFY    | Boltrics Professionals B.V. | Galileilaan 23        | Ede       | Andries Stoik           | 6716 BP    | NL                    |        |
| A0000006 | 10-NEW       | Kaaswinkel Muis             | Martinitorenstraat 12 | Groningen |                         | 2394 AB    | NL                    |        |
| A0000007 | 10-NEW       | Fruit Store Amsterdam       | Beethovenstraat 75    | Amsterdam |                         | NL-1009 AG | NL                    |        |