FORVIS™

Business Central New Features: What's Coming This Fall

What's New in Microsoft Dynamics 365 Business Central Wave 2

Business Technology Solutions

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WEBINAR

- You must respond to at least 3 of the 4 polling questions per CPE hour
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About FORVIS

Services

- Assurance
- Tax
- Consulting

FORVIS ranks among the nation's top 10 public accounting firms, helping unlock the potential of our clients, people, and communities. We deliver an **Unmatched Client Experience**® with assurance, tax, and consulting services that reflect our exceptional capabilities and uncommon commitment to excellence. Discover how our forward vision can help you prepare for what's next.

FORV/S

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Business Technology Solutions

Microsoft Partner

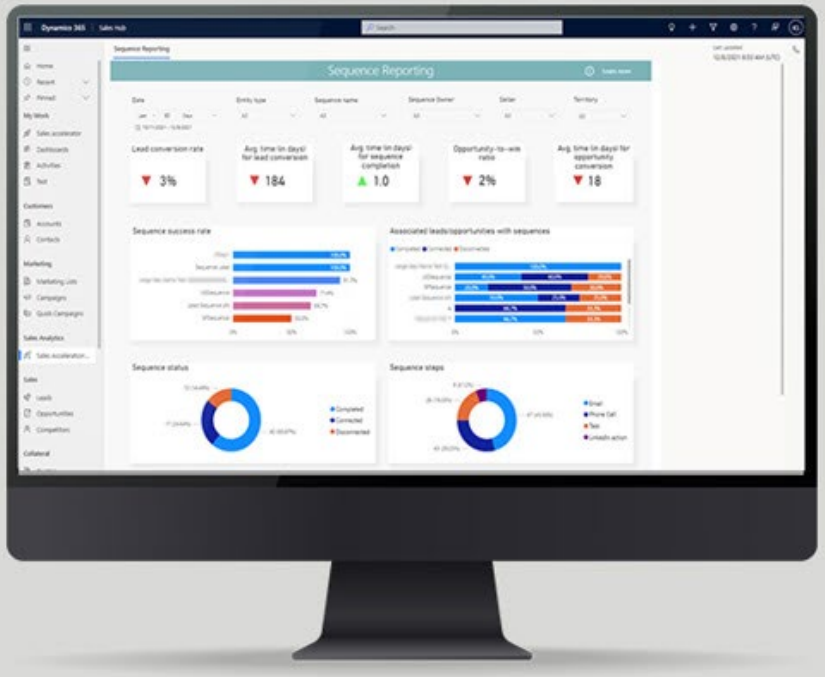
Sage Partner

ORAC NETSUI Solution Pr

salesforce PARTNER

FORVIS' Business Technology Solutions can help support digital transformation across your organization with enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.



From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

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Suzie Moore | Managing Consultant

Meet the Presenters

Stephanie Saculles | Consultant

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Agenda

- Introductions
- Dynamics 365 Business Central Timeline & Road Map
- Fall 2023 Release Highlights
- What's Next
- Summit User Conference

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Microsoft's Release Plan

- Wave 2 2023 Release Dates
  - October 2023 through March 2024
- https://learn.microsoft.com/en-us/dynamics365-release-plan/2023wave2/smb/dynamics365-business-central/planned-features
- What you'll see

Feature	Enabled for	Public preview	General availability
Better bank reconciliation for checks and improved reporting	Users, automatically	✔ Sep 1, 2022	Oct 2022
Extended text functionality for VAT clauses	Users, automatically	✔ Sep 1, 2022	Oct 2022
Financial reporting replaces account schedules	Users, automatically	✔ Sep 1, 2022	Oct 2022

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Application

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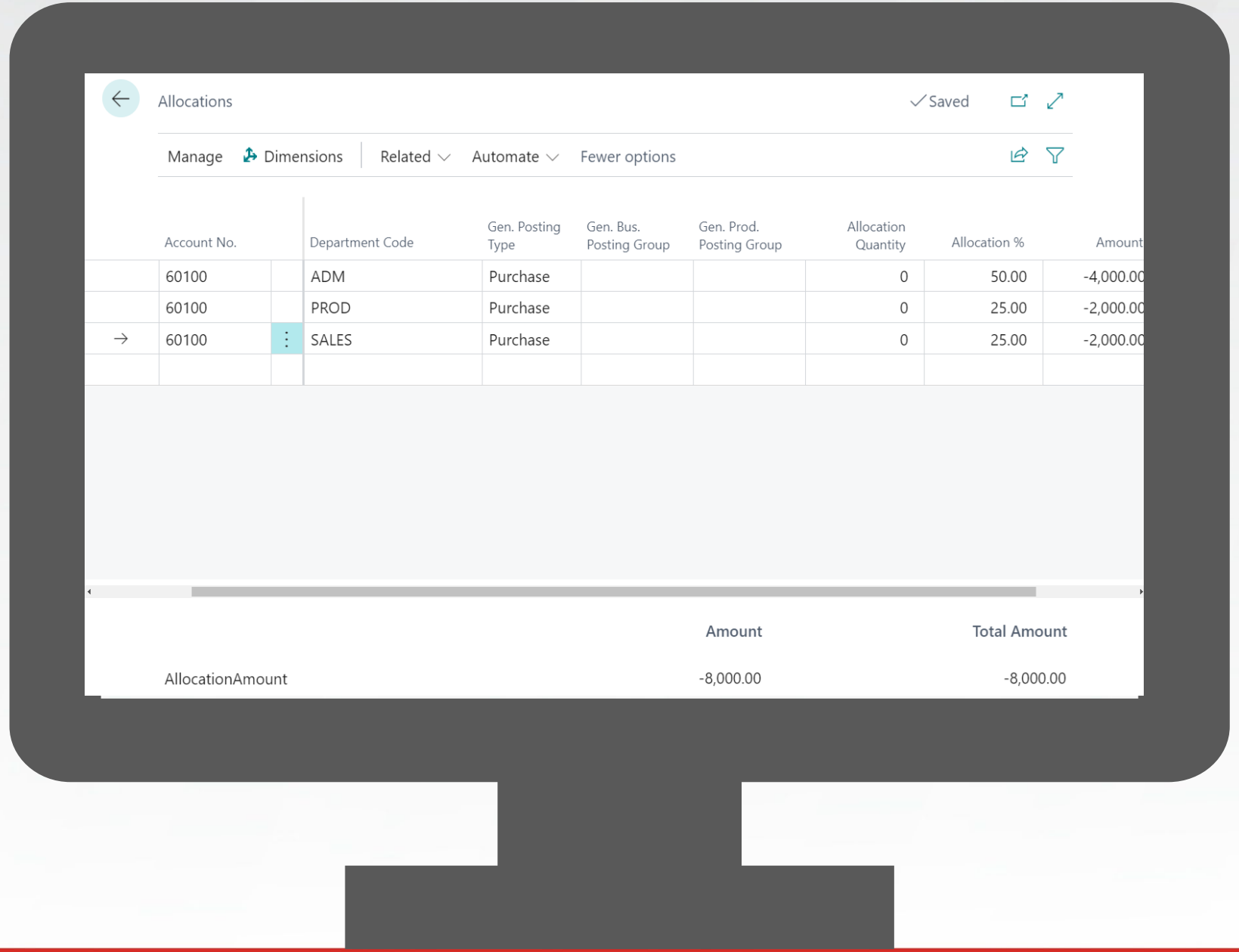
APPLICATION

Currently available on Recurring Journals

Adding to:

- **Journals**
- **Sales Documents**
- **Purchase Documents**



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Sync

document & posting dates for sales & purchases

Purchases & Payables Setup

General

Show less

Discount Posting	All Discounts	Check Prepmt. when ...	
Receipt on Invoice	On	Prepmt. Auto Update ...	Never
Return Shipment on C...		Default Posting Date	Work Date
Invoice Rounding	On	Default Qty. to Receive	Remainder
Create Item from Item...		Combine Special Ord...	Always Combine
Copy Cmts Ret.Ord. t...	On	Link Doc. Date To Pos...	
Exact Cost Reversing ...			

Link Doc. Date To Posting Date

Specifies whether the document date changes when the posting date is modified.

Learn more

Number Series

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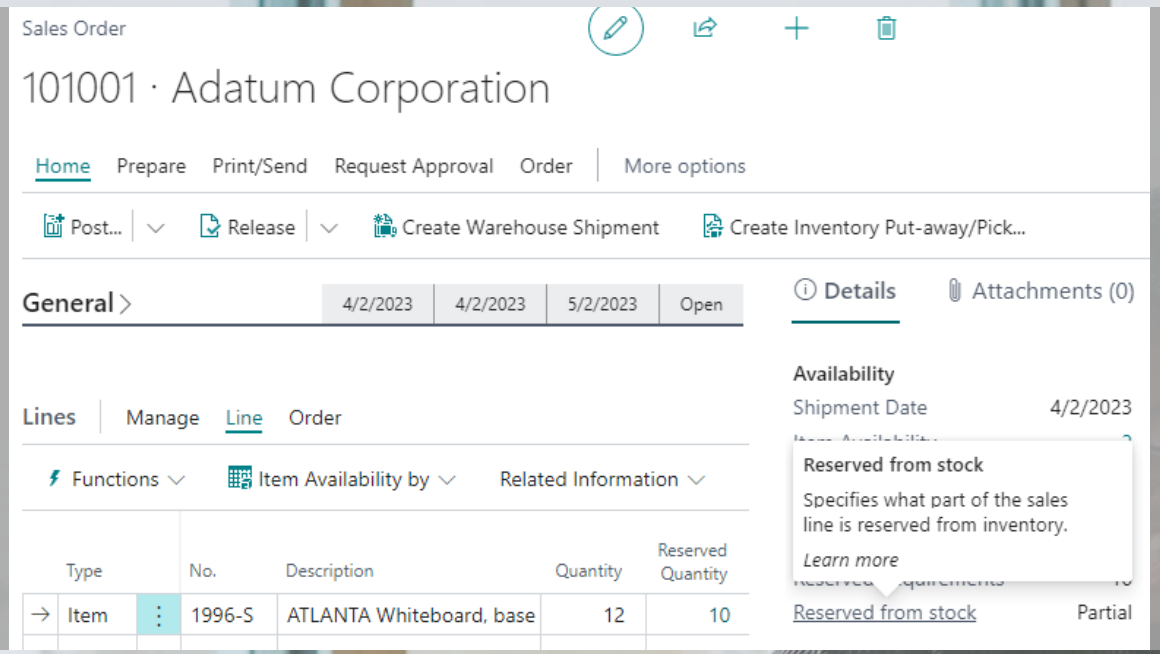
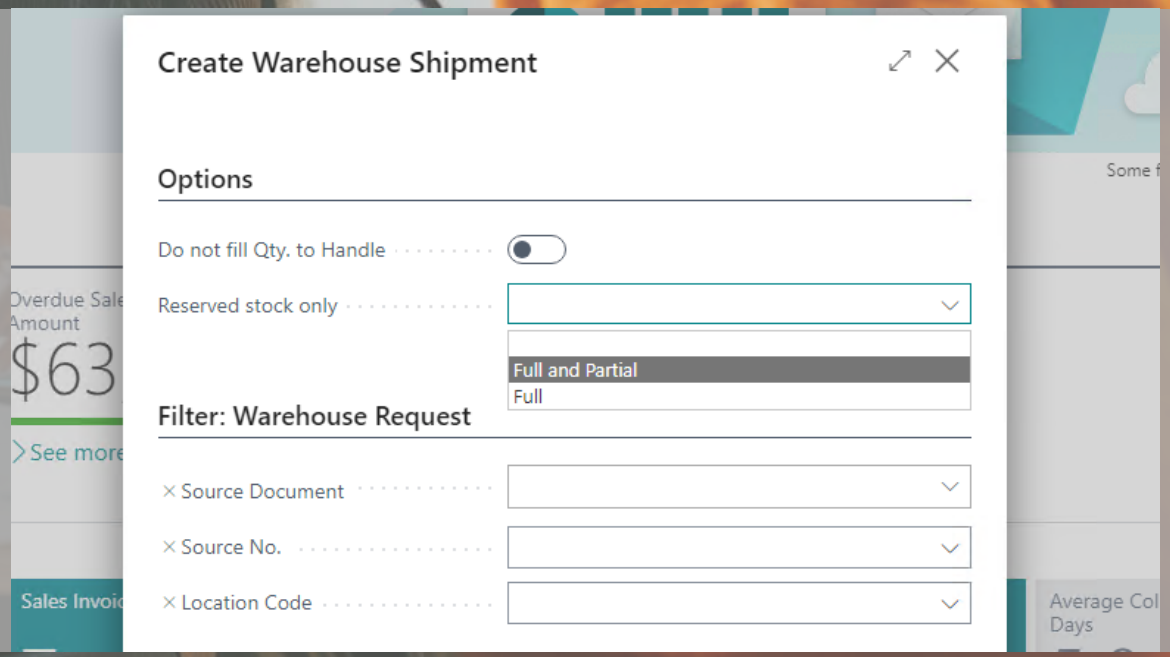
APPLICATION



Sales Orders

Production Orders



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Financial Consolidations

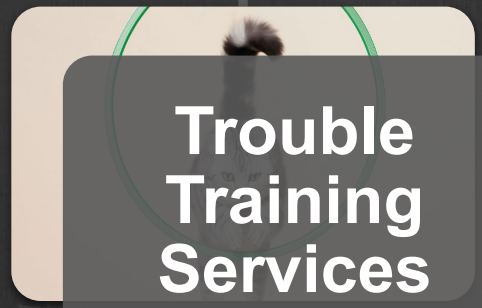
across environments in multicompany setups

APPLICATION

Consolidation Company

Stephanie's Indoor Trampolines

Lyka's Ball Pit Supplies



Trouble Training Services

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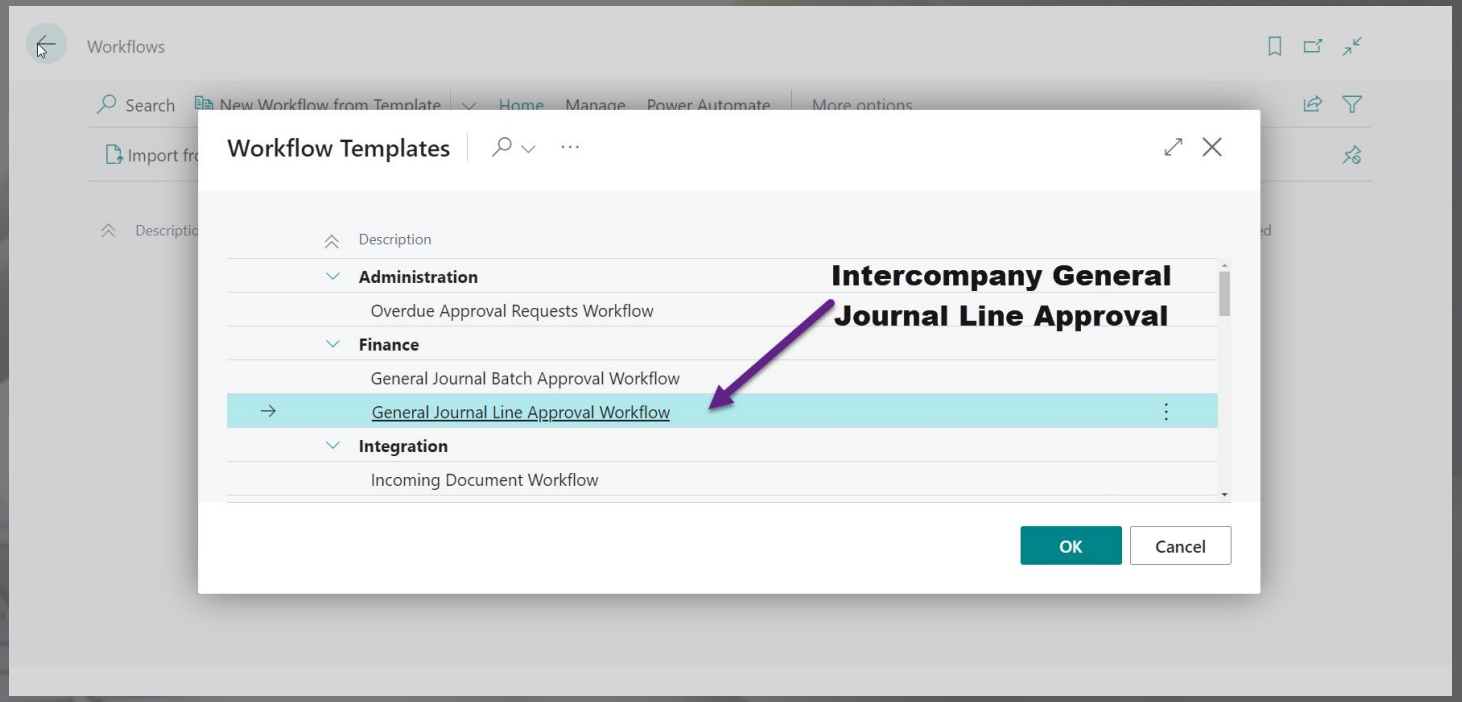

Include approvals

Include approvals for intercompany general journals in your workflows

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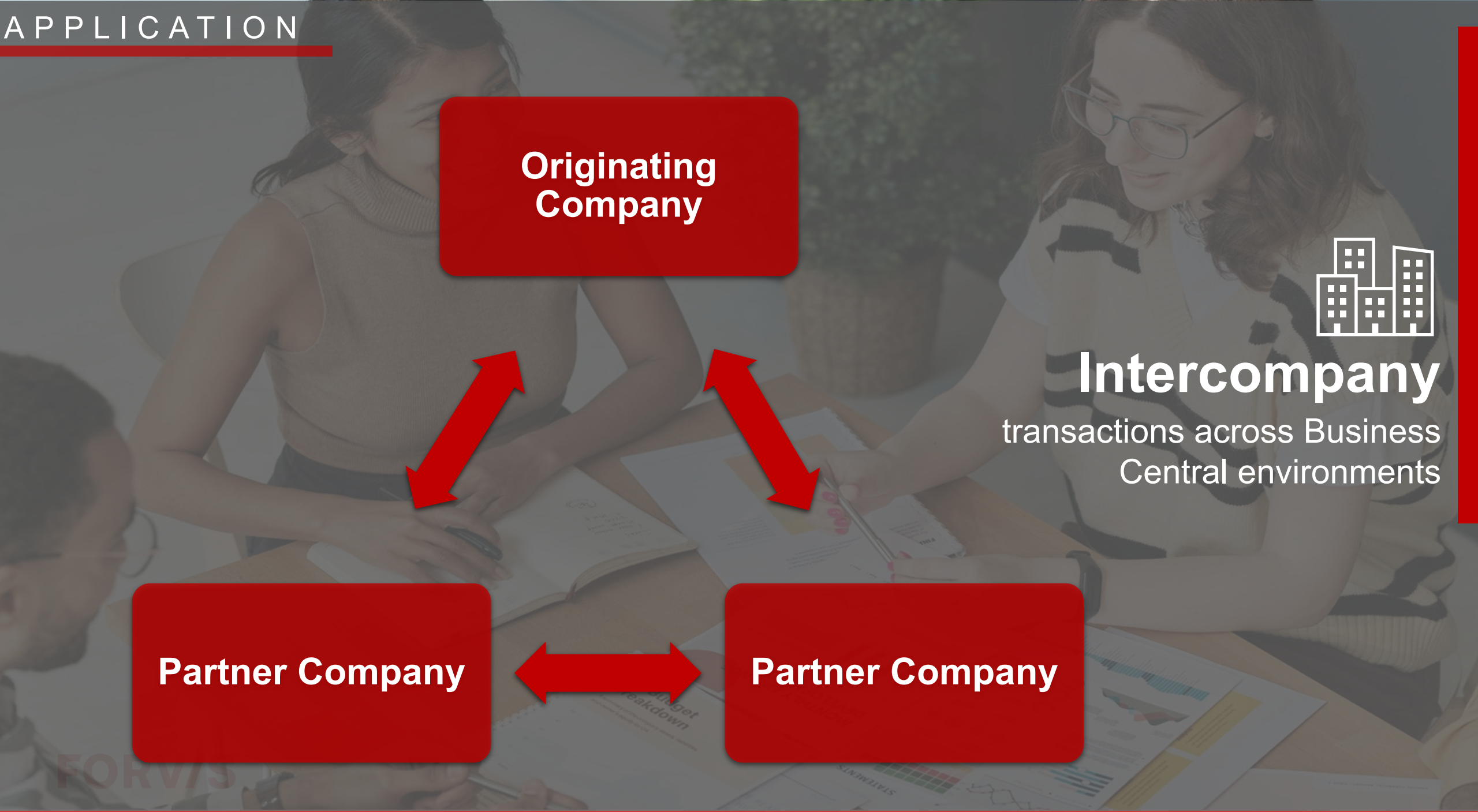
APPLICATION



Intercompany

transactions across Business Central environments

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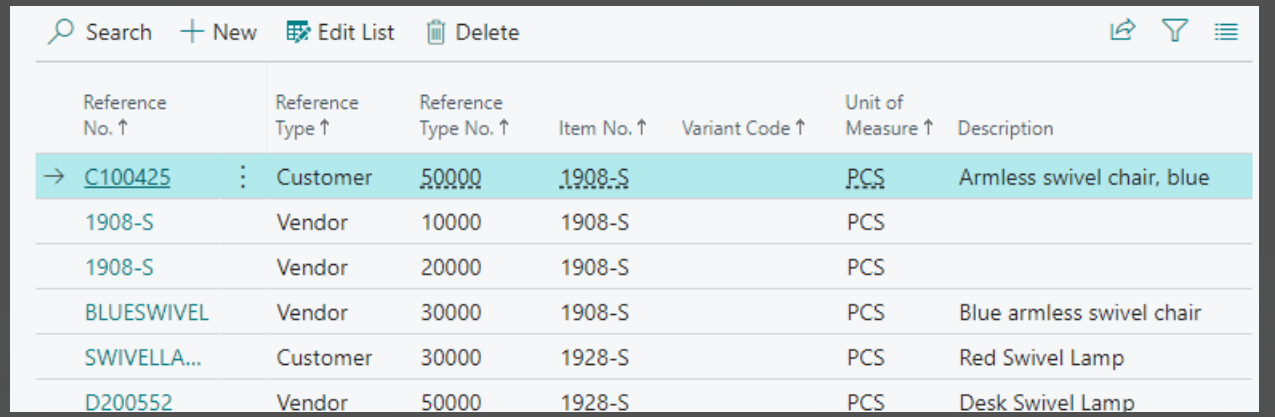
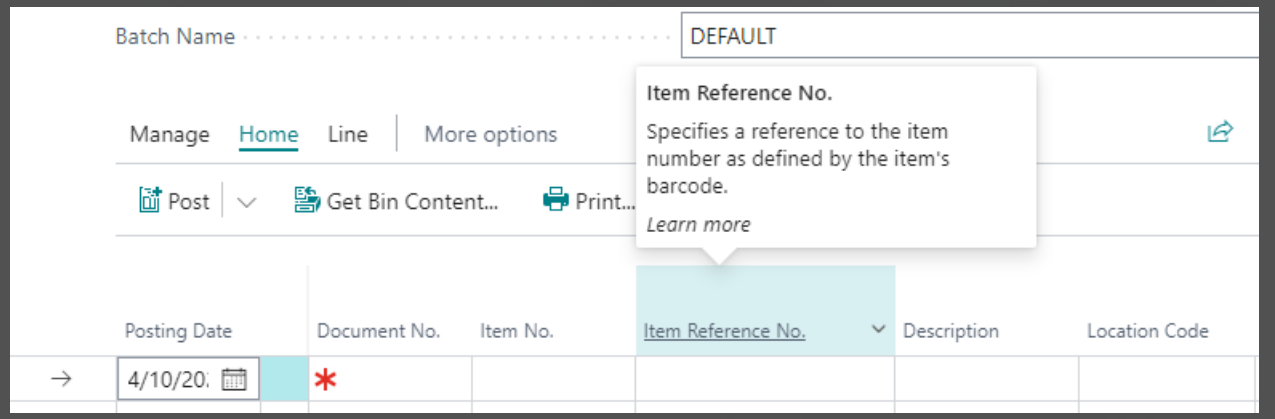
APPLICATION

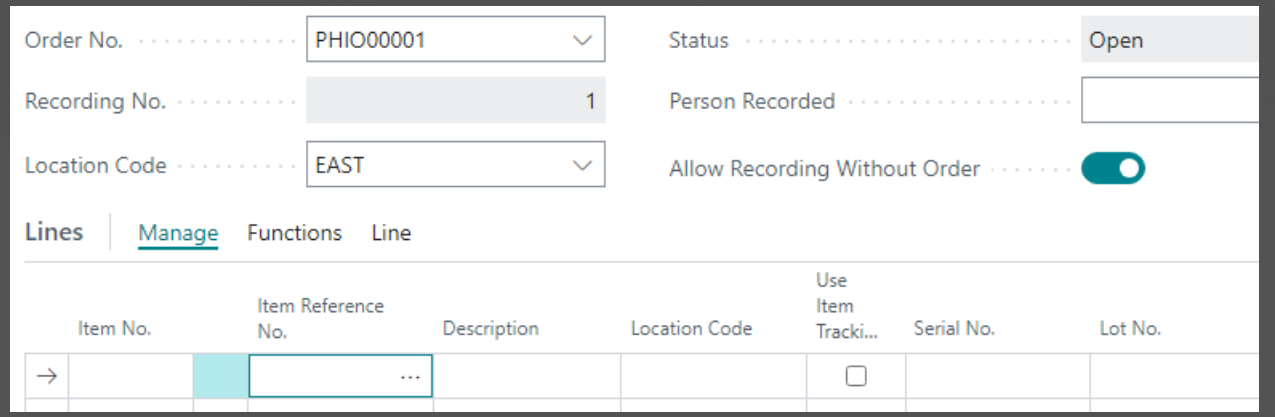
Item Reference List

Item Reclassification Journals

Physical Inventory Recording







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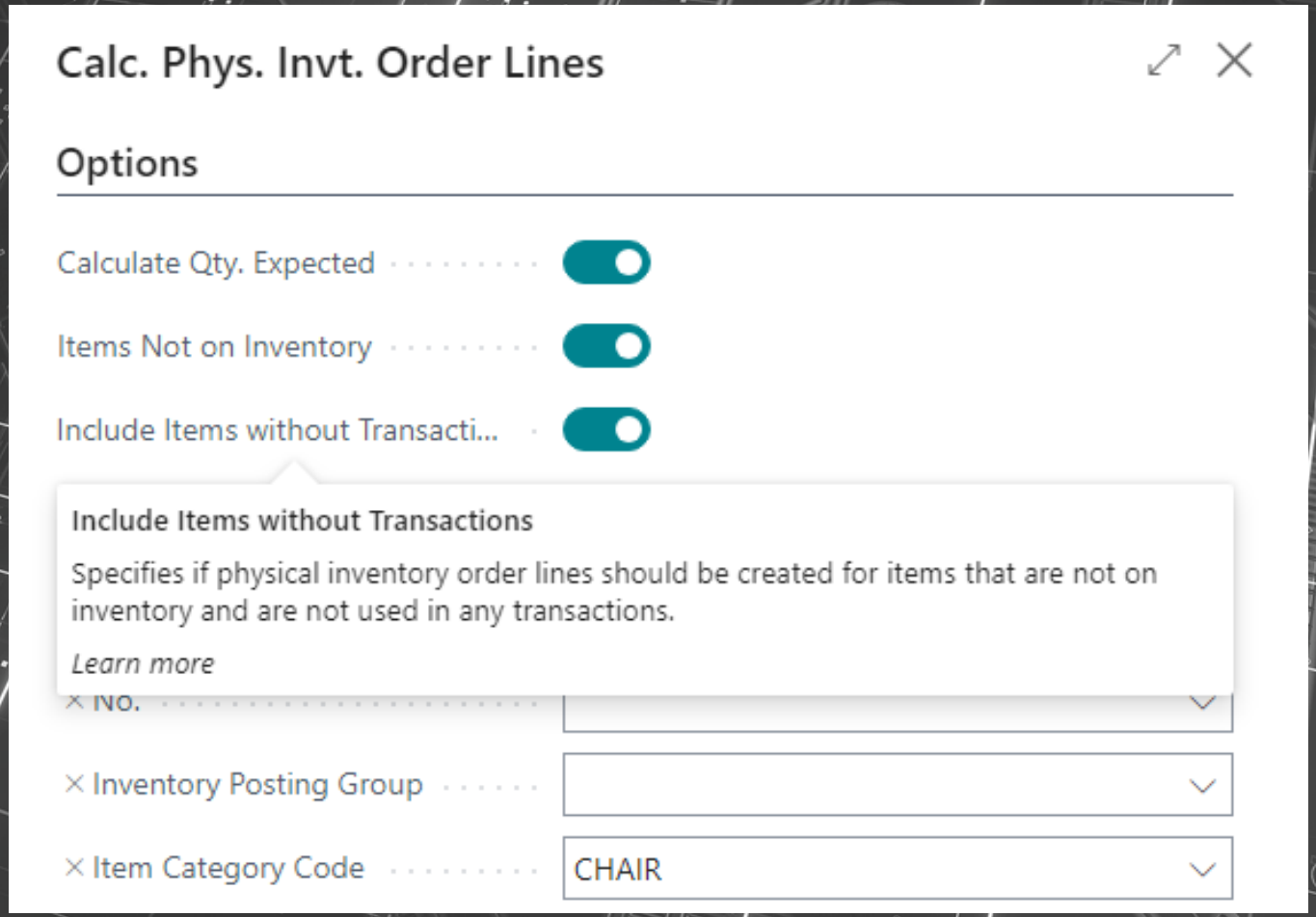
APPLICATION

Items not on inventory

Include items without transactions

Lines inserted on the order



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User Experience

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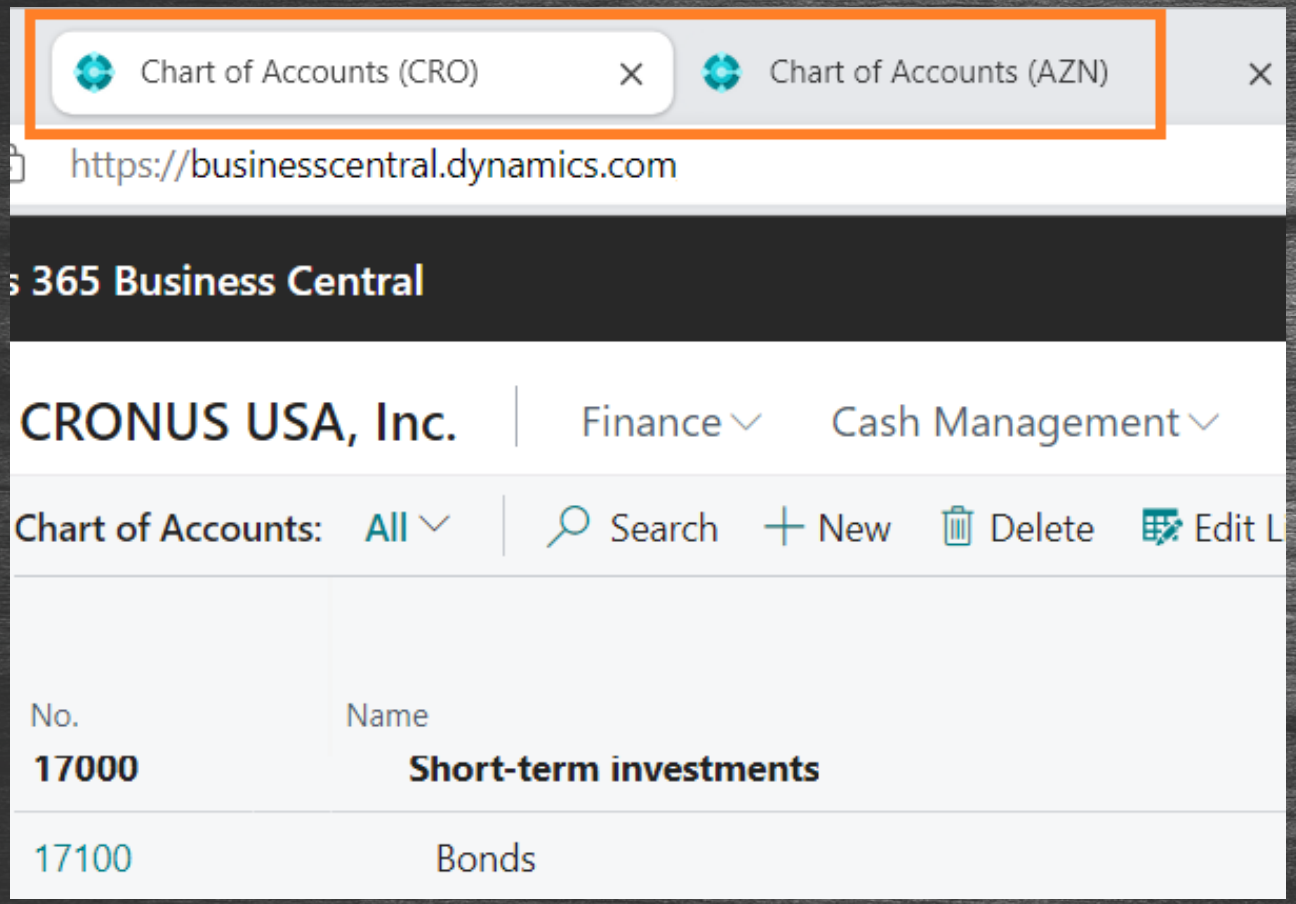
User Experience



Distinguish between browser tabs when multitasking

Context

Readability

Current

Multicompany

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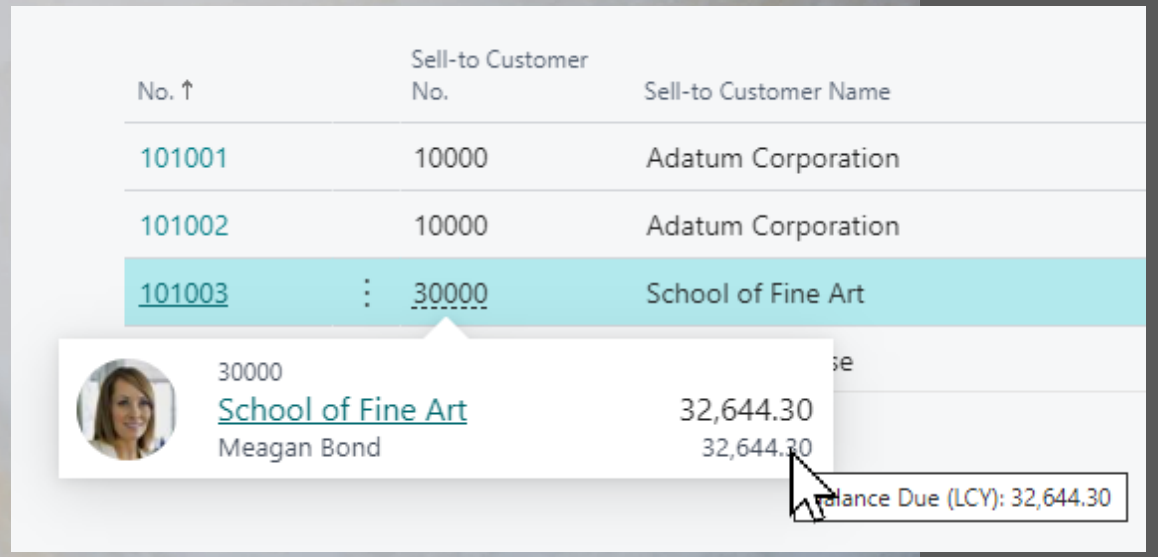
Peek at summarized data



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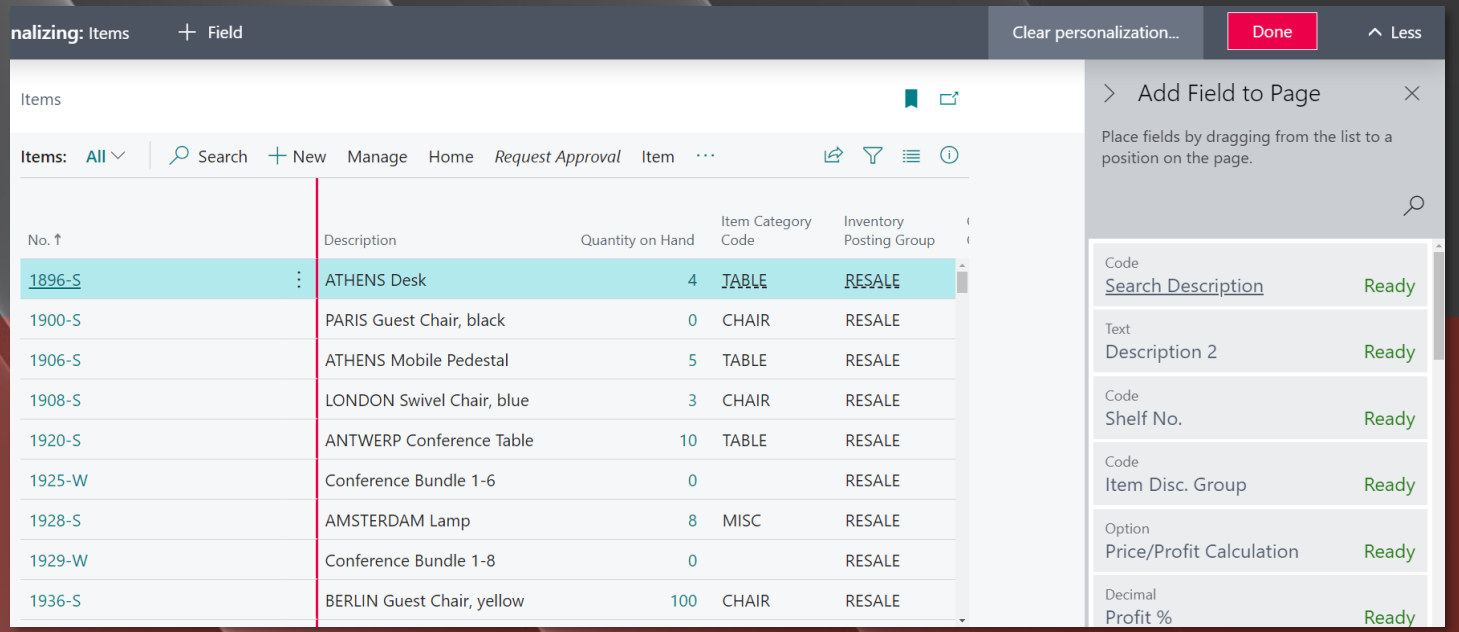
Add existing table fields

- Get access to more fields
- Add to all the right places
- Customize per role
- Start using fields immediately



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Scan barcodes on mobile app

Scenarios:

- UI Button
- AL Action
- Barcode Event

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Application

All about warehousing

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Warehouse ...

Availability Overview ...

Configure Handling ...

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Warehousing

Usability improves for warehouse, inventory, & tracking

Create warehouse employees during testing & presale

Create item journal lines based on the actual contents in a bin

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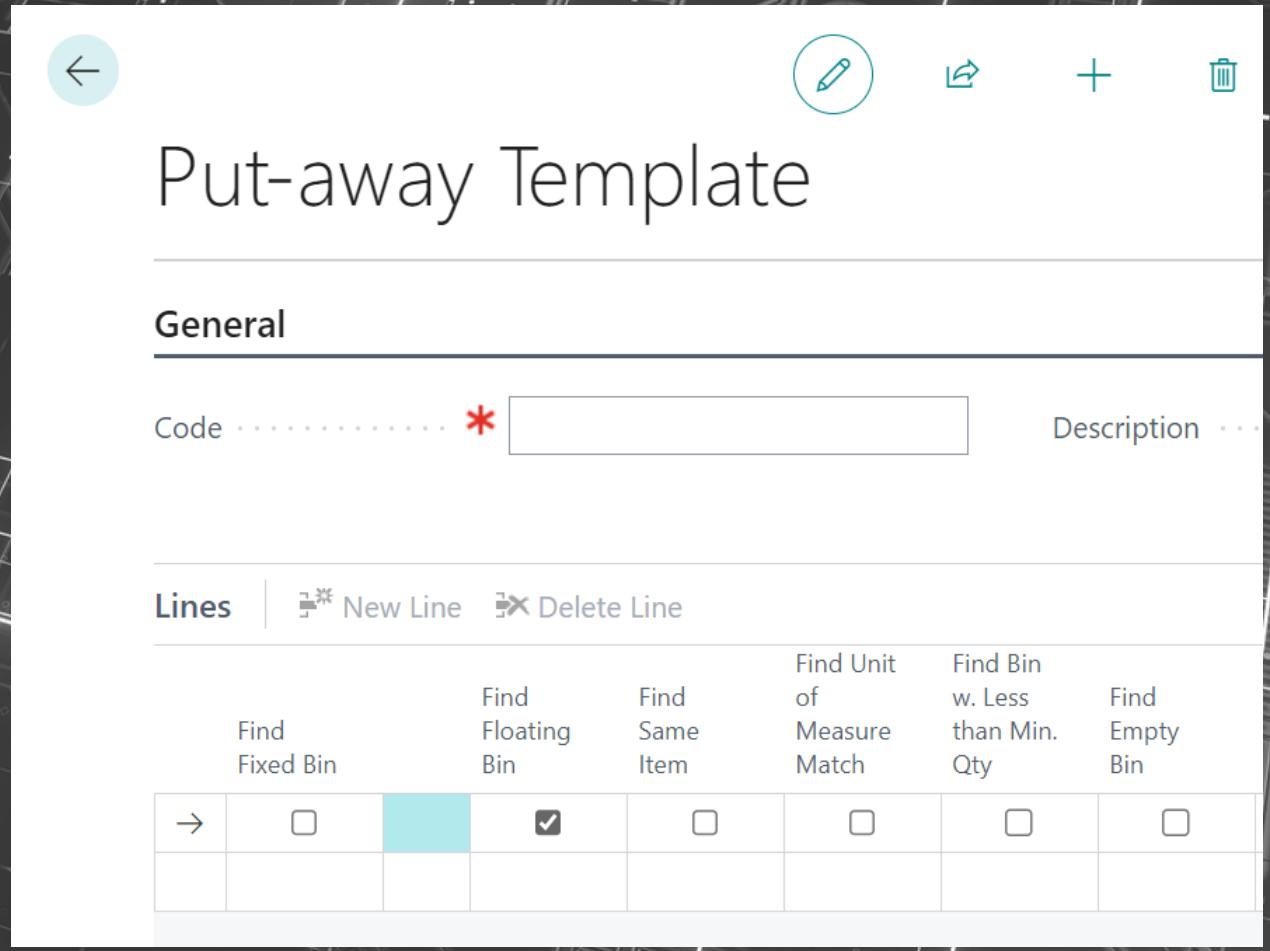
Warehousing

Use directed pick & put-away suggestions in basic warehouse configurations

Put-away template

Bin rankings



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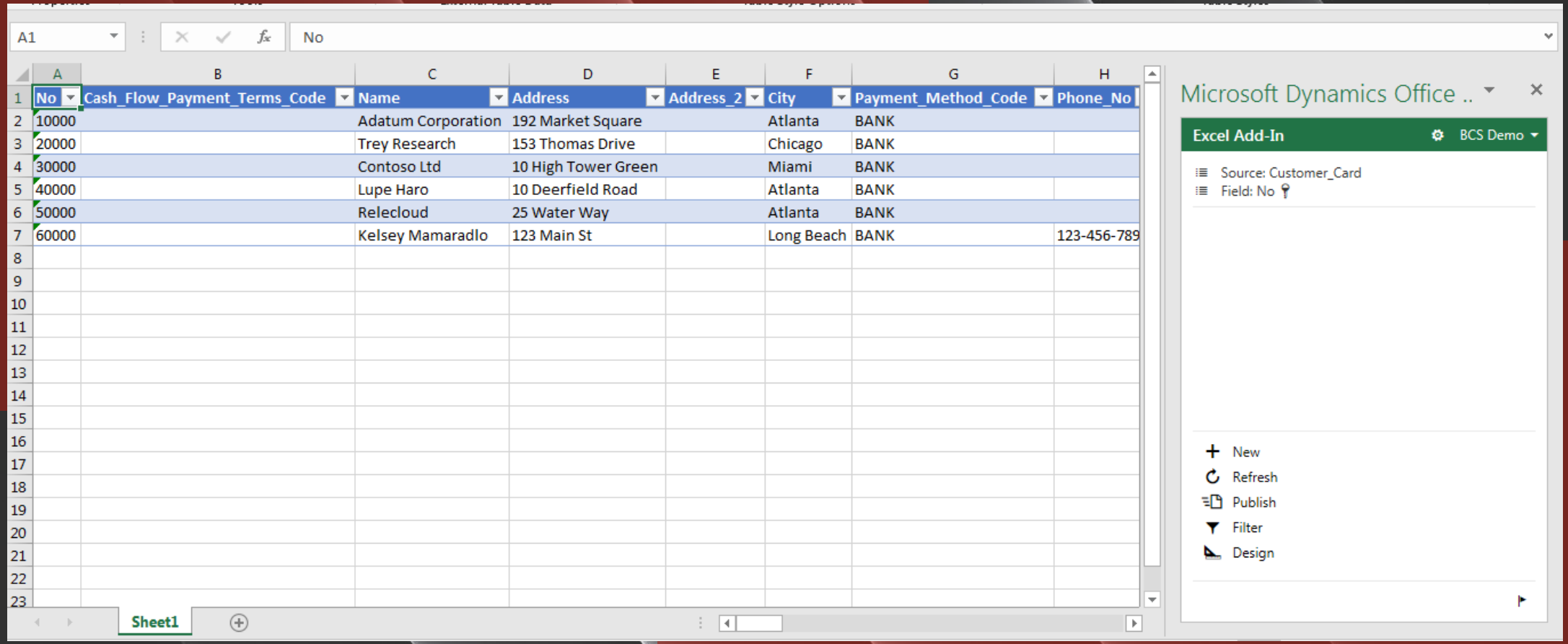
Edit in Excel



No	Cash_Flow_Payment_Terms_Code	Name	Address	Address_2	City	Payment_Method_Code	Phone_No
10000		Adatum Corporation	192 Market Square		Atlanta	BANK	
20000		Trey Research	153 Thomas Drive		Chicago	BANK	
30000		Contoso Ltd	10 High Tower Green		Miami	BANK	
40000		Lupe Haro	10 Deerfield Road		Atlanta	BANK	
50000		Relecloud	25 Water Way		Atlanta	BANK	
60000		Kelsey Mamaradlo	123 Main St		Long Beach	BANK	123-456-789

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Service + Platform

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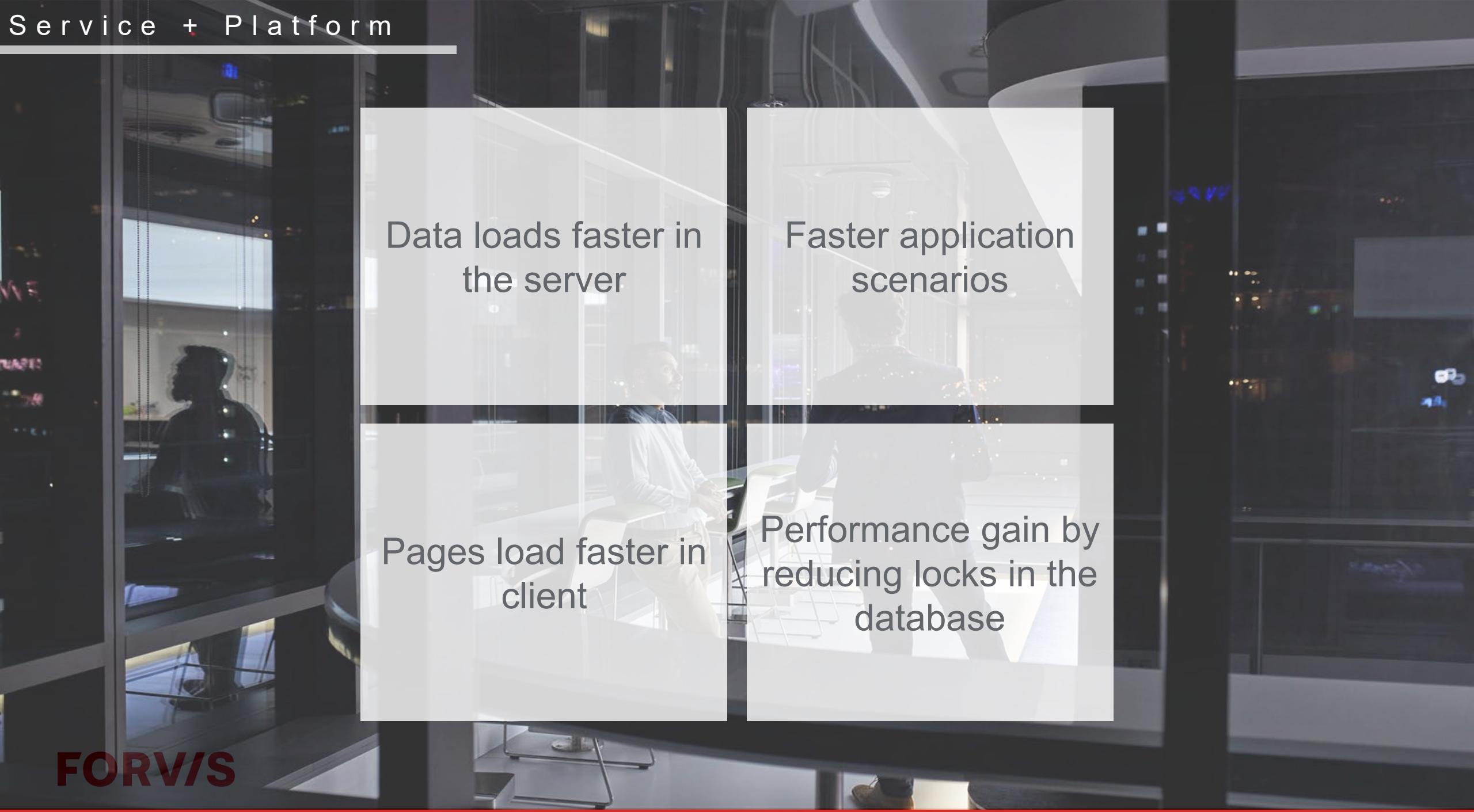
Service + Platform



Data loads faster in the server

Faster application scenarios

Pages load faster in client

Performance gain by reducing locks in the database

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See FORVIS at the Community Summit North America

October 15-20, 2023, in Charlotte, NC | www.summitna.com

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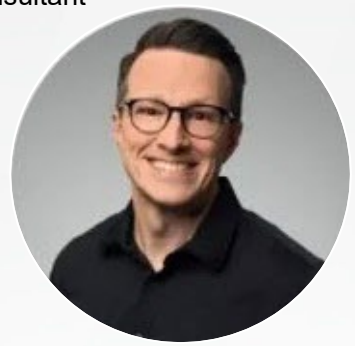

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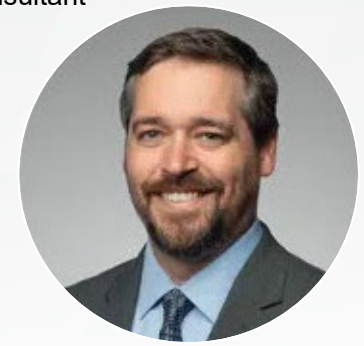

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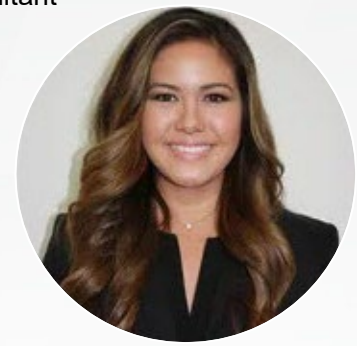

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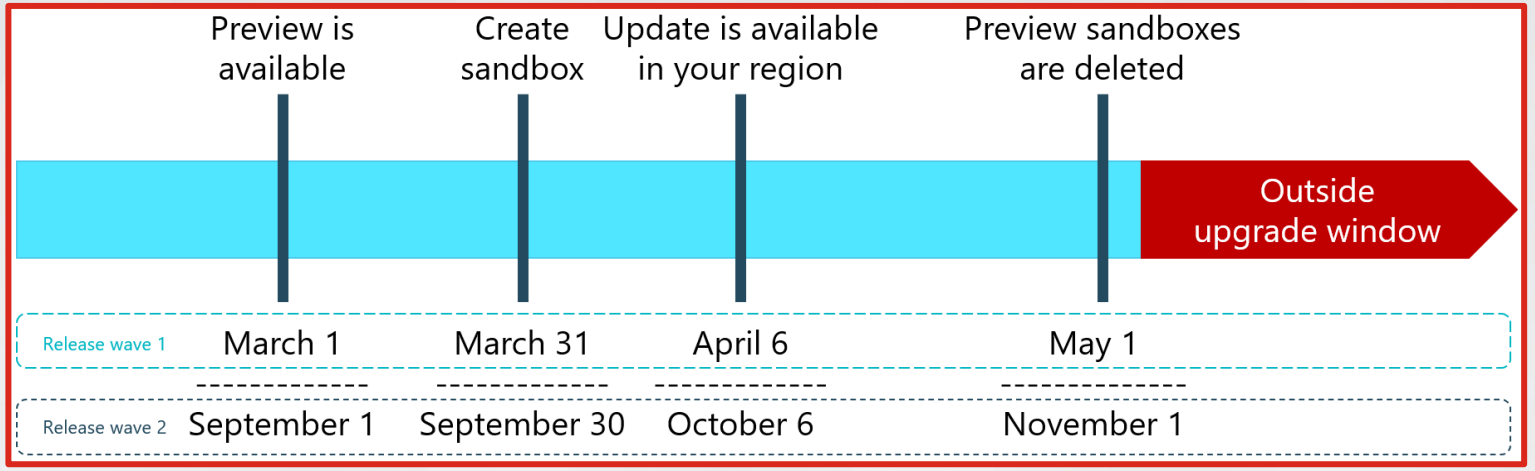
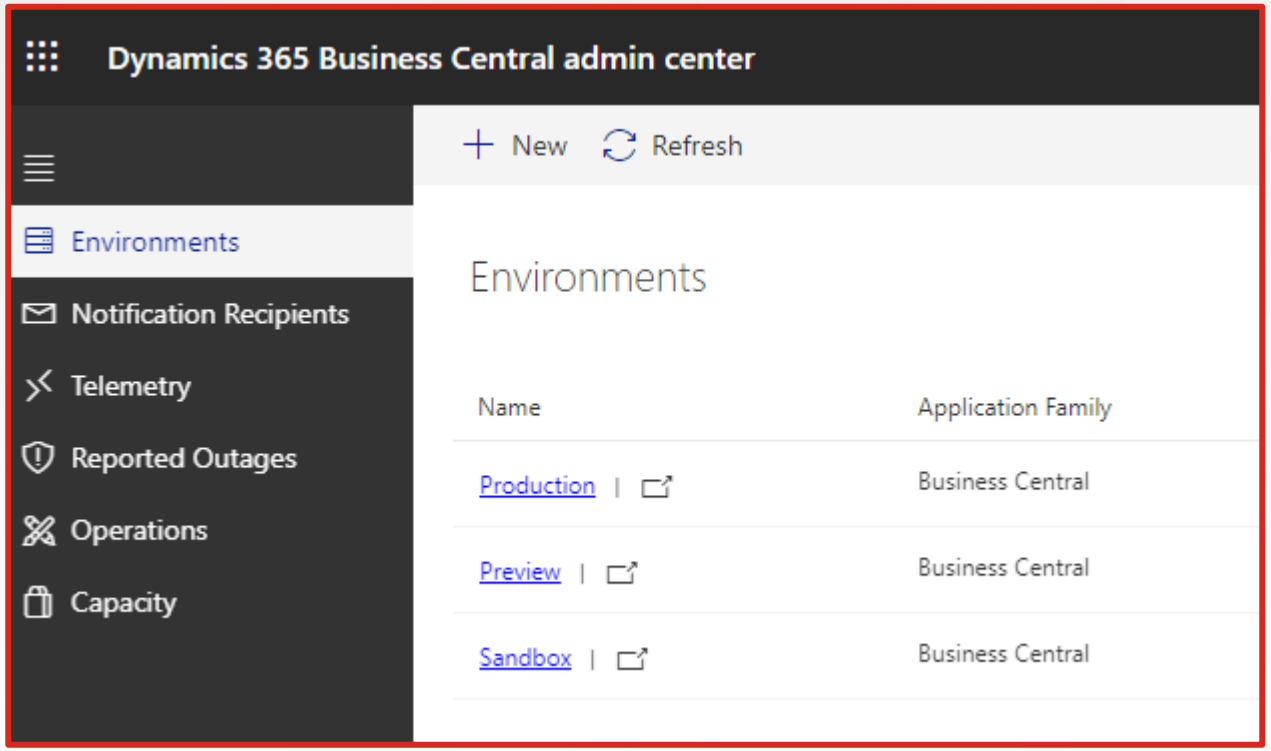
Prepare for major updates with preview environments





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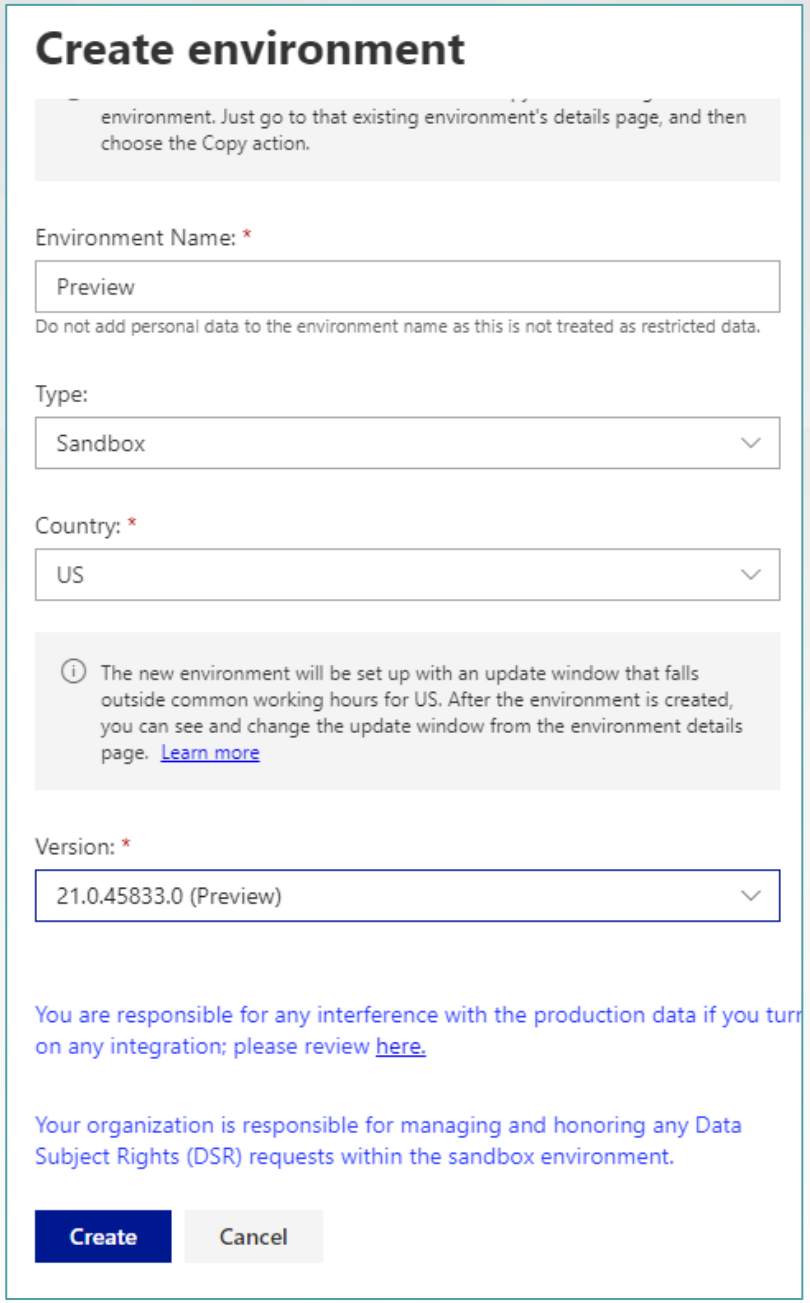

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