

FORVIS™

Business Central New Features: What's Coming This Fall

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



Business Technology Solutions

TO RECEIVE CPE CREDIT

- **You must respond to at least 3 of the 4 polling questions per CPE hour**
- **You must be logged in for a minimum of 50 minutes per every CPE hour in order to receive CPE credit**

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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.



FORVIS

Business Technology Solutions

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.

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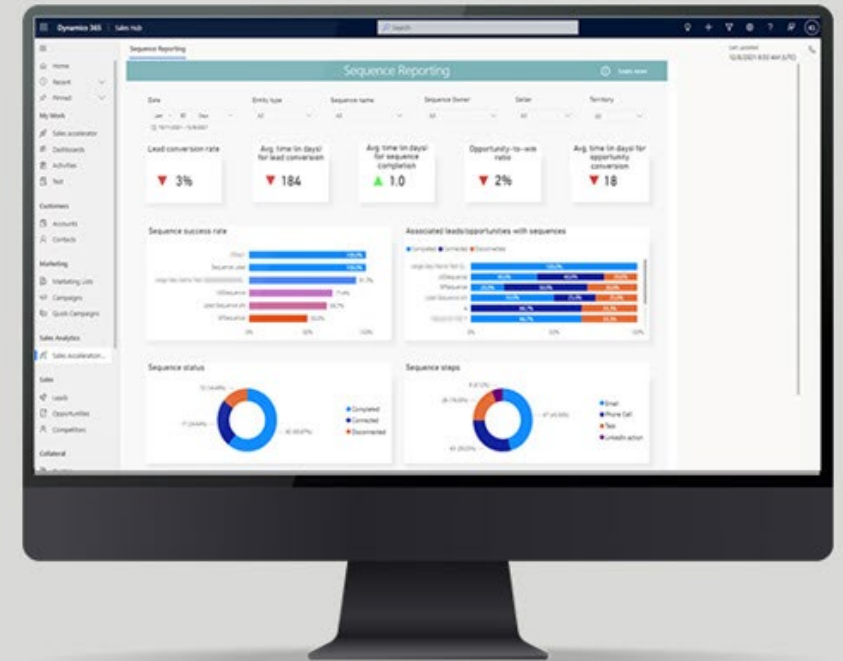
FORVIS is a trademark of FORVIS, LLP, registration of which is pending with the U.S. Patent and Trademark Office.

Microsoft
Partner

Sage Partner

ORAC
NETSUI
Solution Pr

salesforce
PARTNER



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



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

Application

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Currently available on
Recurring Journals




Adding to:

Journals

Sales Documents

Purchase Documents

← Allocations ✓ Saved  

Manage  Dimensions | Related v Automate v Fewer options  

Account No.	Department Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Allocation Quantity	Allocation %	Amount
60100	ADM	Purchase			0	50.00	-4,000.00
60100	PROD	Purchase			0	25.00	-2,000.00
→ 60100	⋮ SALES	Purchase			0	25.00	-2,000.00

	Amount	Total Amount
AllocationAmount	-8,000.00	-8,000.00

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Sync

document & posting dates for sales & purchases

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Purchases & Payables Setup

General

[Show less](#)

Discount Posting ▾

Check Prepm. when ...

Receipt on Invoice

Prepm. Auto Update ... ▾

Return Shipment on C...

Default Posting Date ▾

Invoice Rounding

Default Qty. to Receive ... ▾

Create Item from Item...

Combine Special Ord... ▾

Copy Cmts Ret.Ord. t...

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



101001 · Adatum Corporation

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick...

General >

4/2/2023 4/2/2023 5/2/2023 Open

Details Attachments (0)

Lines Manage Line Order

Functions Item Availability by Related Information

Type	No.	Description	Quantity	Reserved Quantity
→ Item	1996-S	ATLANTA Whiteboard, base	12	10

Availability
Shipment Date 4/2/2023

Reserved from stock
Specifies what part of the sales line is reserved from inventory.
[Learn more](#)

Reserved from stock Partial



Sales Orders



Production Orders

Create Warehouse Shipment

Options

Do not fill Qty. to Handle

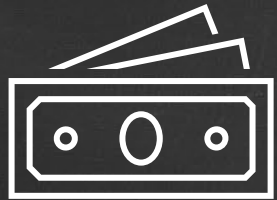
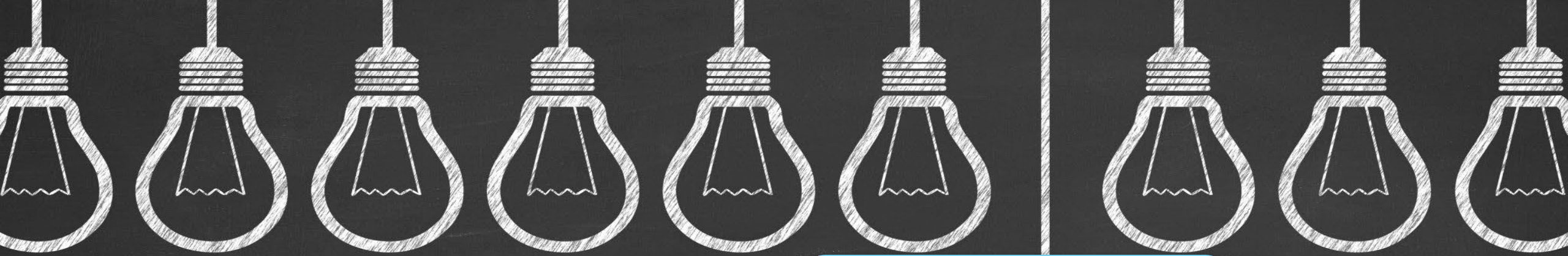
Reserved stock only

Filter: Warehouse Request

× Source Document

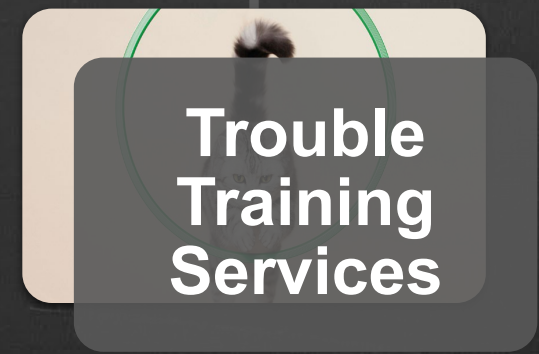
× Source No.

× Location Code

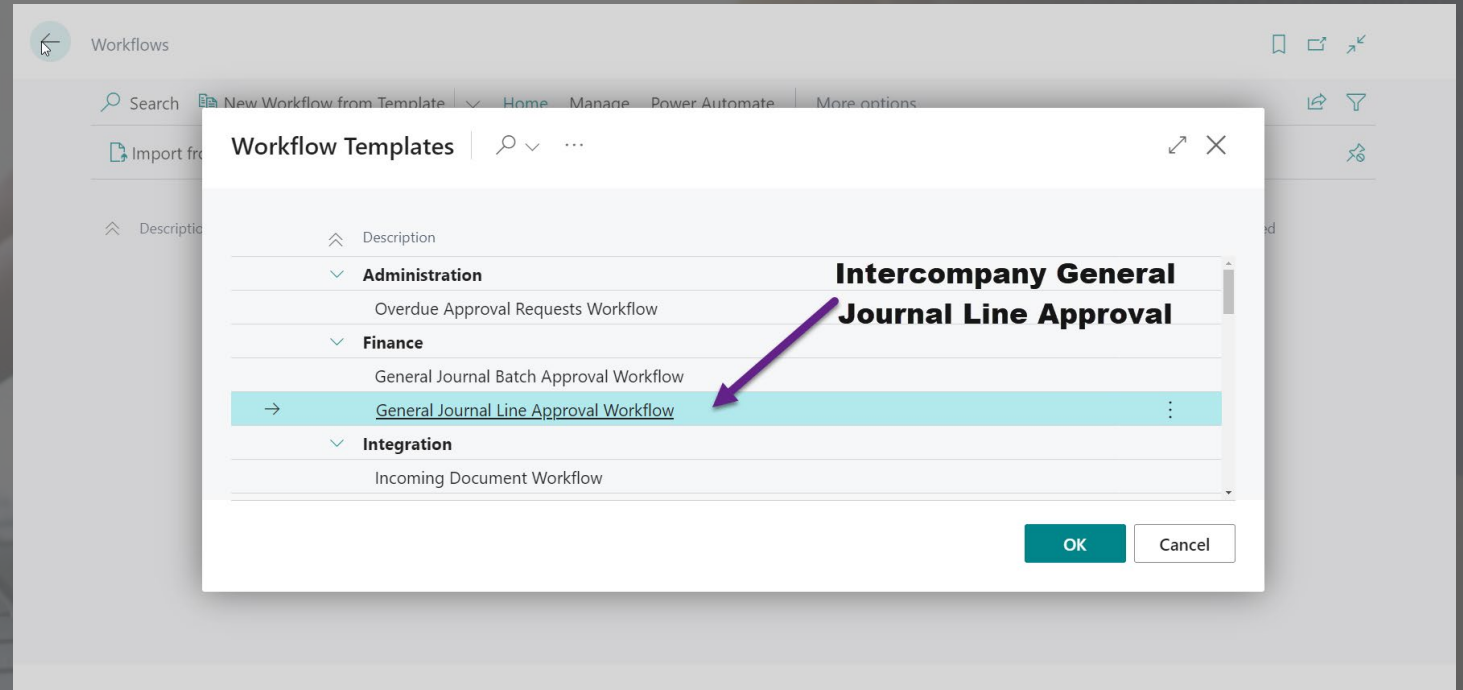


Financial Consolidations

across environments in multicompany setups



APPLICATION



Include approvals

Include approvals for intercompany general journals in your workflows

**Originating
Company**



Intercompany

transactions across Business
Central environments

Partner Company

Partner Company

Item Reference List

Reference No. ↑	Reference Type ↑	Reference Type No. ↑	Item No. ↑	Variant Code ↑	Unit of Measure ↑	Description
→ C100425	Customer	50000	1908-S		PCS	Armless swivel chair, blue
1908-S	Vendor	10000	1908-S		PCS	
1908-S	Vendor	20000	1908-S		PCS	
BLUESWIVEL	Vendor	30000	1908-S		PCS	Blue armless swivel chair
SWIVELLA...	Customer	30000	1928-S		PCS	Red Swivel Lamp
D200552	Vendor	50000	1928-S		PCS	Desk Swivel Lamp

Item Reclassification Journals

Batch Name DEFAULT

Manage Home Line | More options

Post | Get Bin Content... | Print...

Item Reference No.
Specifies a reference to the item number as defined by the item's barcode.
[Learn more](#)

Posting Date	Document No.	Item No.	Item Reference No.	Description	Location Code
→ 4/10/20	*				

Physical Inventory Recording

Order No. PHIO00001

Recording No. 1

Location Code EAST

Status Open

Person Recorded

Allow Recording Without Order

Lines | Manage Functions Line

Item No.	Item Reference No.	Description	Location Code	Use Item Tracki...	Serial No.	Lot No.
→	...			<input type="checkbox"/>		

Items not on inventory



Include items without transactions



Lines inserted on the order



Calc. Phys. Invt. Order Lines



Options

Calculate Qty. Expected

Items Not on Inventory

Include Items without Transacti...

Include Items without Transactions

Specifies if physical inventory order lines should be created for items that are not on inventory and are not used in any transactions.

[Learn more](#)

× NO.

× Inventory Posting Group

× Item Category Code



User Experience

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User Experience

Chart of Accounts (CRO) x Chart of Accounts (AZN) x

https://businesscentral.dynamics.com

365 Business Central

CRONUS USA, Inc. | Finance v Cash Management v

Chart of Accounts: All v | Search + New Delete Edit L

No.	Name
17000	Short-term investments
17100	Bonds



Distinguish between browser tabs when multitasking

Context



Readability



Current



Multicompany



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Peek at summarized data



No. ↑	Sell-to Customer No.	Sell-to Customer Name
101001	10000	Adatum Corporation
101002	10000	Adatum Corporation
<u>101003</u>	⋮ 30000	School of Fine Art



30000
[School of Fine Art](#)
Meagan Bond

32,644.30
32,644.30

Balance Due (LCY): 32,644.30

Add existing table fields

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

nalizing: Items + Field Clear personalization... Done ^ Less

Items

Items: All Search + New Manage Home Request Approval Item ...

No. ↑	Description	Quantity on Hand	Item Category Code	Inventory Posting Group
1896-S	ATHENS Desk	4	TABLE	RESALE
1900-S	PARIS Guest Chair, black	0	CHAIR	RESALE
1906-S	ATHENS Mobile Pedestal	5	TABLE	RESALE
1908-S	LONDON Swivel Chair, blue	3	CHAIR	RESALE
1920-S	ANTWERP Conference Table	10	TABLE	RESALE
1925-W	Conference Bundle 1-6	0		RESALE
1928-S	AMSTERDAM Lamp	8	MISC	RESALE
1929-W	Conference Bundle 1-8	0		RESALE
1936-S	BERLIN Guest Chair, yellow	100	CHAIR	RESALE

Add Field to Page

Place fields by dragging from the list to a position on the page.

- Code Search Description Ready
- Text Description 2 Ready
- Code Shelf No. Ready
- Code Item Disc. Group Ready
- Option Price/Profit Calculation Ready
- Decimal Profit % Ready

**Scan barcodes on
mobile app**



Scenarios:

UI Button

AL Action

Barcode Event



Application

All about warehousing

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Warehouse



Availability
Overview



Configure
Handling





**Usability improves
for warehouse,
inventory, &
tracking**



**Create warehouse
employees during
testing & presale**



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



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



Put-away template



Bin rankings



Put-away Template

General

Code * Description

Lines | New Line Delete Line

	Find Fixed Bin	Find Floating Bin	Find Same Item	Find Unit of Measure Match	Find Bin w. Less than Min. Qty	Find Empty Bin
→	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The screenshot displays a Microsoft Dynamics Office window with an Excel spreadsheet and a right-hand pane. The spreadsheet contains a table with the following data:

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

The right-hand pane, titled "Microsoft Dynamics Office ..", shows an "Excel Add-In" section with a gear icon and "BCS Demo". Below this, it lists "Source: Customer_Card" and "Field: No". At the bottom of the pane, there are several icons and labels: "+ New", "Refresh", "Publish", "Filter", and "Design".

A smiling woman with her hair in a bun, wearing a light green top, is the central focus. She is in a modern office environment with several computer monitors and other people working in the background. The office has wooden shelves with books and papers. A semi-transparent grey box is overlaid on the right side of the image, containing the text 'Service + Platform'.

Service + Platform

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Data loads faster in
the server

Faster application
scenarios

Pages load faster in
client

Performance gain by
reducing locks in the
database

See FORVIS at the Community Summit North America

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



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Managing Consultant



CHAD COLLETT
Sr. Managing
Consultant



BENJAMIN SCOTT
Sr. Managing
Consultant



DAVID STEINKEN
Sr. Managing
Consultant



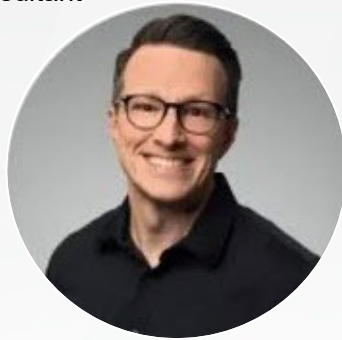
CHARLES ALLEN
Sr. Managing
Consultant



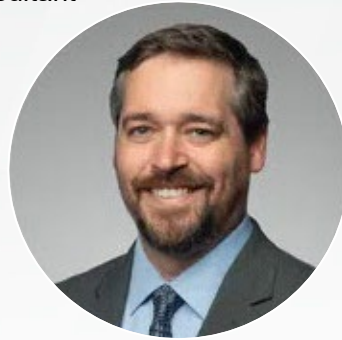
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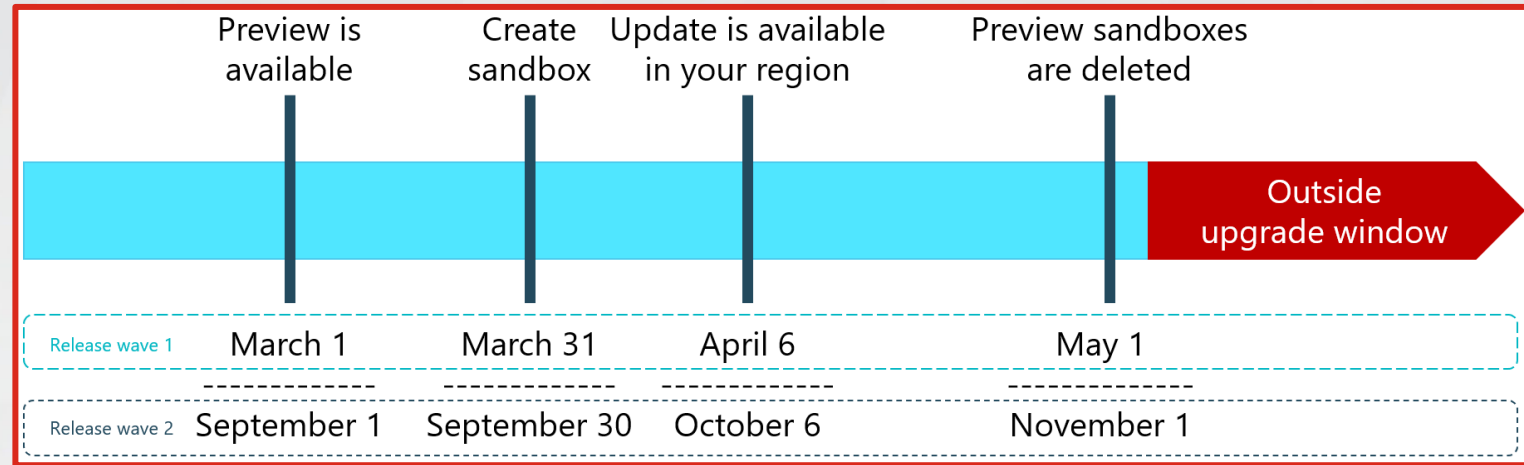


**STEPHANIE
SACULLES**
Consultant

FORVIS

Try it out!

Prepare for major updates with preview environments



The screenshot shows the Dynamics 365 Business Central admin center interface. The left sidebar contains navigation options: Environments (selected), Notification Recipients, Telemetry, Reported Outages, Operations, and Capacity. The main content area displays the 'Environments' page with a table listing the current environments.

Name	Application Family
Production	Business Central
Preview	Business Central
Sandbox	Business Central

Try it out!

Prepare for major updates with preview environments

Create environment

environment. Just go to that existing environment's details page, and then choose the Copy action.

Environment Name: *

Preview

Do not add personal data to the environment name as this is not treated as restricted data.

Type:

Sandbox

Country: *

US

i The new environment will be set up with an update window that falls outside common working hours for US. After the environment is created, you can see and change the update window from the environment details page. [Learn more](#)

Version: *

21.0.45833.0 (Preview)

You are responsible for any interference with the production data if you turn on any integration; please review [here](#).

Your organization is responsible for managing and honoring any Data Subject Rights (DSR) requests within the sandbox environment.

Create

Cancel

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