

# FORVIS

## **What's New in Microsoft Dynamics 365 Business Central Fall Release 2022 – Part 1**

September 29, 2022

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## ▪ Individuals

- Participate in entire webinar
- Answer polls when they are provided

## ▪ Groups

- Group leader is the person who registered & logged on to the webinar
  - Answer polls when they are provided
  - Complete group attendance form
  - Group leader sign bottom of form
  - Submit group attendance form to [cpecompliance@forvis.com](mailto:cpecompliance@forvis.com) within 24 hours of webinar
- If all eligibility requirements are met, each participant will be emailed their CPE certificate within 15 business days of webinar. Due to the large volume of certificates of completion issued, requests to re-issue lost or misplaced certificates will be honored up to 60 days following the webinar

# Meet the Presenter



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# Agenda



- Introductions
- Dynamics 365 Business Central Timeline & Road Map
- Fall 2022 Release Highlights
- What's Next
- Summit User Conference

# Microsoft's Release Plan

- Wave 2 2022 Release Dates
  - October 2022 through March 2023
- <https://docs.microsoft.com/en-us/dynamics365-release-plan/2022wave2/smb/dynamics365-business-central/planned-features>
- What you'll see

Feature	Enabled for	Public preview	General availability
<a href="#">Better bank reconciliation for checks and improved reporting</a>	Users, automatically	✓ Sep 1, 2022	Oct 2022
<a href="#">Extended text functionality for VAT clauses</a>	Users, automatically	✓ Sep 1, 2022	Oct 2022
<a href="#">Financial reporting replaces account schedules</a>	Users, automatically	✓ Sep 1, 2022	Oct 2022

# Application

Better bank  
reconciliation for  
checks &  
improved reporting

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Match check entries

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Test Report

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G/L Acc. Balance (LCY) field

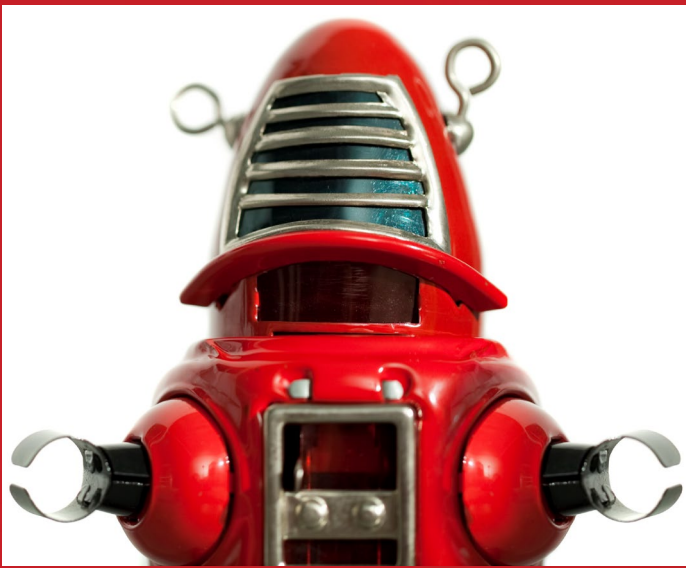
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Sum of Difference fields

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Bank Statement Report

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**Danger! Danger!**



## Direct Posting to G/L Warning



The selected bank account posting group is linked to a general ledger account that allows direct posting. The bank account reconciliation process might become problematic if the instructions in the documentation are not followed. Do you want to know more?

Yes

No

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**Application**



**This just in!**



# Financial reporting replaces account schedules!




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**Application**






# Financial Reporting

- Account Schedules become Row Definitions
- Column Layouts become Column Definitions

← Column Definition ✓ Saved   

Name .....  ...

Manage  Copy Column Layout | More options  

	Column No.	Column Header	Column Type	Ledger Entry Type	Amount Type	Budget Name	Formula	Show Opp... Sign	Comparison Date Formula	Show
→	<input type="text"/>	⋮ Balance	Balance at ...	Entries	Net Amount			<input type="checkbox"/>		Always

# A Rose by Any Other Name...



Dynamics 365 Business Central

Environment: Preview

Financial Reports

Search + New Edit List Delete Edit Financial Report... Print... Edit Row Definition Edit Column Definition... Copy Financial Report Import Financial Report Export Financial Report

Name ↑	Description	Row Definition	Column Definition
→ <a href="#">ACC-CAT</a>	Account Categories overview	ACC-CAT	PERIODS
<a href="#">ANALYSIS</a>	Capital Structure	ANALYSIS	BAL ONLY
<a href="#">CASHFLOW</a>	Calculation Of Cash Flow	CASHFLOW	CASHFLOW
<a href="#">I_CACycle</a>	Data for Cash Cycle Chart	I_CACycle	PERIODS
<a href="#">I_CASHFLOW</a>	Data for Cash Flow Chart	I_CASHFLOW	PERIODS
<a href="#">I_INCEXP</a>	Data for Income & Expense Chart	I_INCEXP	PERIODS
<a href="#">I_MINTRIAL</a>	Data for Reduced Trial Balance Info Part	I_MINTRIAL	PERIODS
<a href="#">M-BALANCE</a>	Balance Sheet	M-BALANCE	M-BALANCE
<a href="#">M-CASHFLOW</a>	Cash Flow Statement	M-CASHFLOW	M-NETCHANG
<a href="#">M-INCOME</a>	Income Statement	M-INCOME	M-NETCHANG
<a href="#">M-RETAINED</a>	Retained Earnings	M-RETAINED	M-NETCHANG
<a href="#">REVENUE</a>	Revenues	REVENUE	BUDGANALYS

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**Application**

# ...Will Smell as Sweet

The screenshot displays the Dynamics 365 Business Central interface for a Financial Report. The report title is "M-BALANCE - Balance Sheet - M-BALANCE - M-BALANCE". The report is dated 04/11/22 and is viewed by Day. The "Show All Lines" toggle is turned on. The report is organized into dimensions, including Department, Customer Group, Cost Center, and Cost Object. The main table shows the following data:

Row No.	Description	Balance
P0001	Assets	-
P0002	Current Assets	-
P0003	Cash	76,549.23
P0004	Accounts Receivable	70,023.84
P0005	Prepaid Expenses	-
P0006	Inventory	44,594.10



When you search for *Account Schedules*, you'll see search results for *Financial Reporting*

# Find Posted & Non-Posted Document Lines in Search

Tell me what you want to do ↗ ✕

**Go to Reports and Analysis** Show less (3)

- [Posted Sales Invoice Lines](#) Archive
- [Posted Sales Shipment Lines](#) Archive
- [Posted Purchase Receipt Lines](#) Archive
- [Posted Purchase Invoice Lines](#) Archive
- [Posted Sales Credit Memo Lines](#) Archive
- [Posted Purchase Cr. Memo Lines](#) Archive

---

**Documentation**

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**Get from Microsoft AppSource** Show all (181)

---

Didn't find what you were looking for? Try [exploring pages and reports](#)



# Make Entry of Variant Codes Required



- Avoid mistakes in data entry when dealing with items that have variants

Inventory Setup

General Posting Journal Templates More options

**General** Show more

Automatic Cost Posting  Off

Automatic Cost Adjus... Always

Default Costing Meth... FIFO

Prevent Negative Inve...  Off

Variant Mandatory if E...  On

**Variant Mandatory if Exists**  
Specifies whether a variant must be selected if variants exist for an item. This is the default setting for all items. However, the same option is available on the Item Card page for items. That setting applies to the specific item.  
[Learn more](#)

Item Card

SP-SCM1006 · AutoDripLite

Home Item Prices & Discounts Request Approval More options

**Item** Show more

No. SP-SCM1006

Description AutoDripLite

Blocked  Off

Type Inventory

Base Unit of Measure PCS

Item Category Code CM\_CONSUM

Variant Mandatory i... Default (Yes)

Default (Yes)  
No  
Yes

Sales Order

S-ORD101005 · Adatum Corporation

Home Report Release Posting Prepare Order Request Approval Print/Send Navigate

**General**

Customer Name Adatum Corporation Order Date 5/11/2022

Contact Robert Townes Status Open


Lines Manage More options

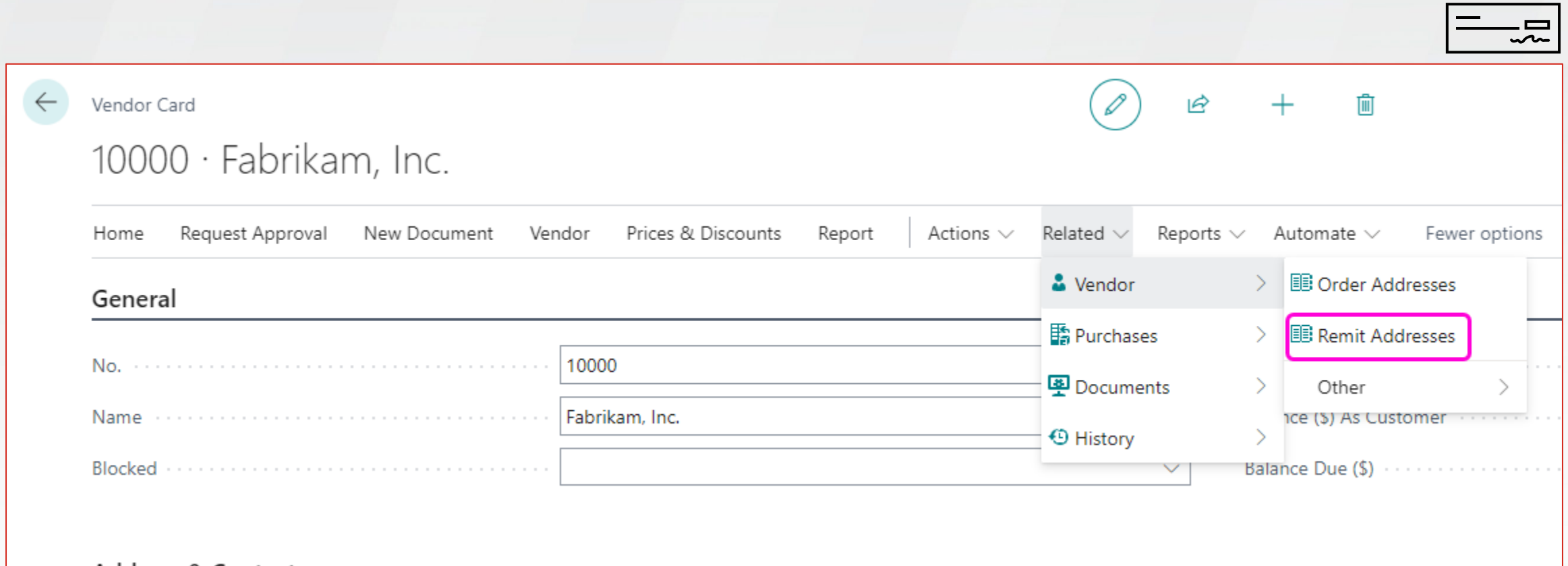
Type	No.	Variant Code	Item Reference No.	Description
Item	SP-SCM1006	RED		AutoDripLite - Red
→ Item	SP-SCM1006	*		AutoDripLite

**FORV/S**

**Application**

# Use Multiple Remit-to Addresses for Vendors

- Stop the presses! 



Vendor Card

10000 · Fabrikam, Inc.

Home Request Approval New Document Vendor Prices & Discounts Report Actions Related Reports Automate Fewer options

**General**

No. .... 10000

Name .... Fabrikam, Inc.

Blocked .....

Vendor

Purchases

Documents

History

Order Addresses

Remit Addresses

Other

Balance Due (\$)

# New Updates for the Reconciliation Journals



## Reverse payment reconciliation journal entries

- Updates to the Test Report
- Reverse payment reconciliation journal entries
- Number Series

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**Application**

# Administration

Get more, better communications as admin

- More proactive communications from Microsoft
- Microsoft 365 Message Center & Service Health Dashboard

The screenshot displays the Dynamics 365 Business Central admin center interface. The top navigation bar includes a hamburger menu icon, the text 'Dynamics 365 Business Central admin center', and '+ New' and 'Refresh' buttons. The left sidebar contains navigation items: 'Environments', 'Notification Recipients', 'Telemetry', 'Reported Outages', 'Operations', and 'Capacity'. The main content area is titled 'Environments' and features a table with the following data:

Name	Application Family	Type	State	Country/region	Current Version	Available
<a href="#">Production</a>	Business Central	Production	Active	US	20.4.44313.44365	20.5.454
<a href="#">Preview</a>	Business Central	Sandbox	Active	US	21.0.45833.0 (Preview)	
<a href="#">Sandbox</a>	Business Central	Sandbox	Active	US	20.4.44313.44365	20.5.454

Below the table, a pink-bordered box contains the following text:

Coming soon

Messages and information about incidents or advisories that apply to your environments will soon appear here. Until then, find messages in the [Message Center](#) and information about service health incidents and advisories for Dynamics 365 Business Central in the [Service Health Dashboard](#).



# Peace of Mind

- Deleted Environments
  - Soft Delete
  - Admins able to restore
  - No need for Microsoft support

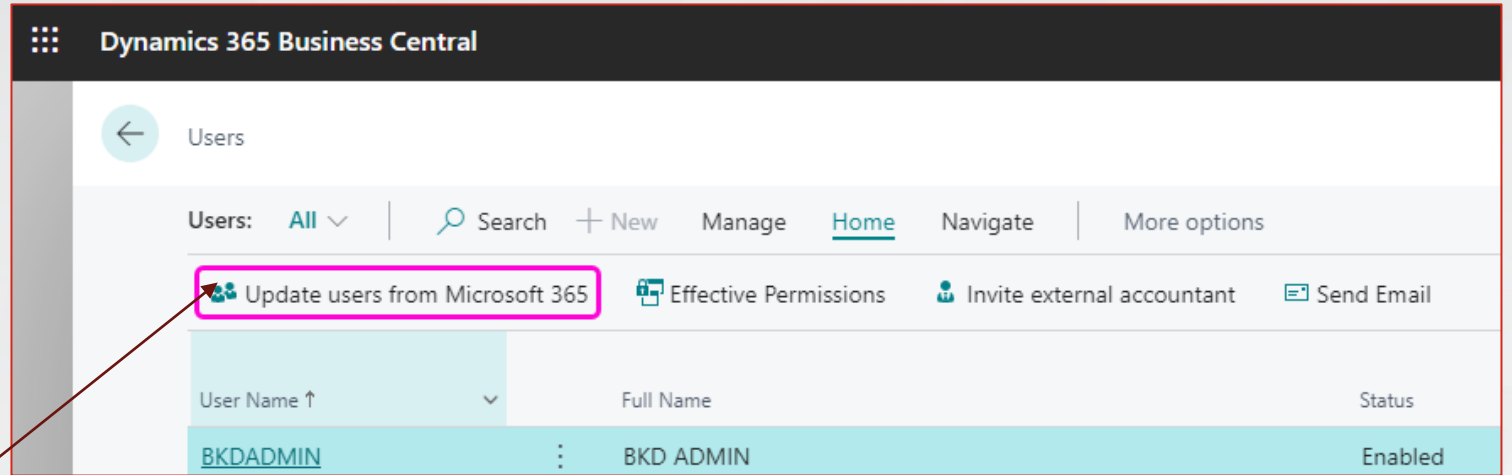
A woman with long dark hair, wearing a grey jacket, is shown in profile from the chest up. She is looking upwards and to the left with her eyes closed, appearing to be in a state of calm or meditation. The background is a soft-focus sunset or sunrise over a field, with the sun low on the horizon, creating a warm, golden glow. The sky transitions from a pale blue at the top to a deep orange near the horizon. The overall mood is peaceful and serene.

**Administration**

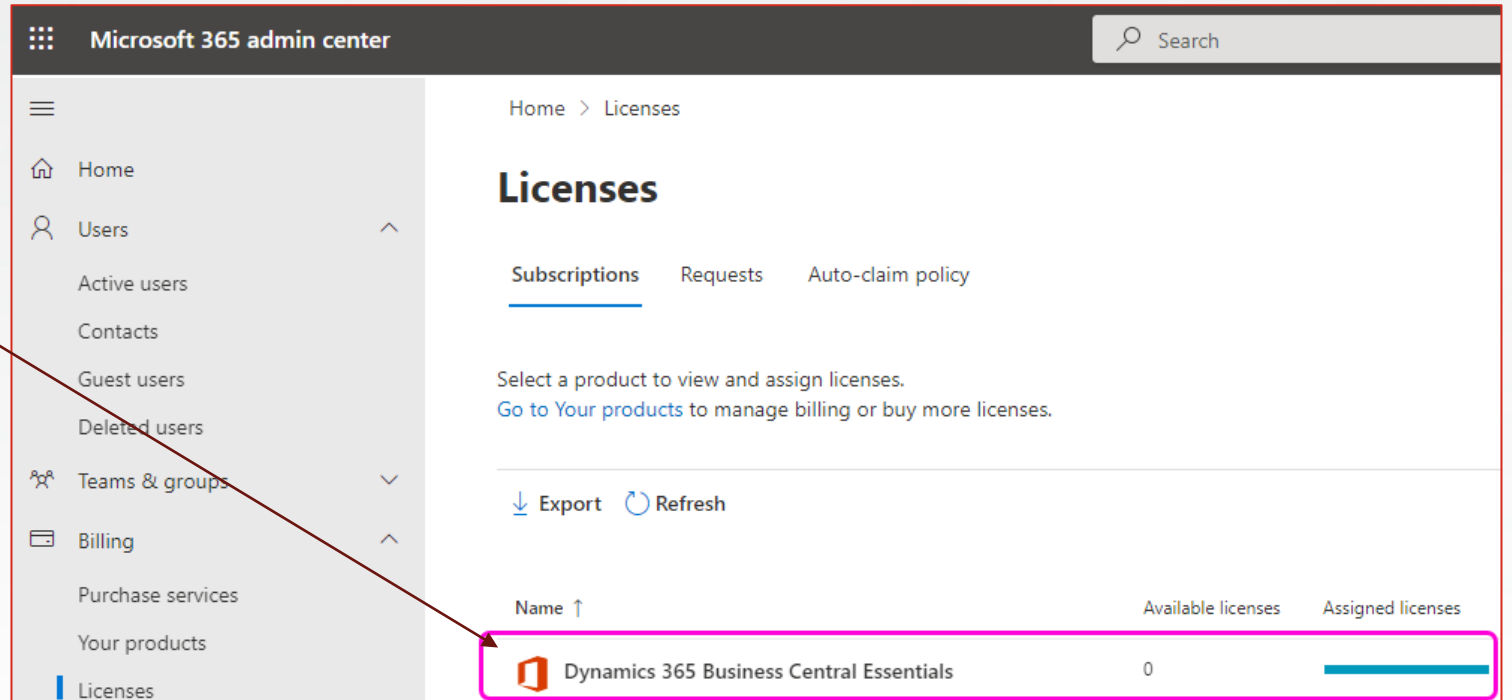
# New Users

Update licensed users from Microsoft 365 faster

Business Central pulls the Licensed Users from Microsoft 365 admin center



The screenshot shows the 'Users' page in Dynamics 365 Business Central. At the top, there is a navigation bar with 'Users: All', a search icon, and buttons for '+ New', 'Manage', 'Home', 'Navigate', and 'More options'. Below this, a row of action buttons includes 'Update users from Microsoft 365' (highlighted with a pink box), 'Effective Permissions', 'Invite external accountant', and 'Send Email'. A table below lists users with columns for 'User Name', 'Full Name', and 'Status'. The first row shows 'BKDADMIN' with a status of 'Enabled'.



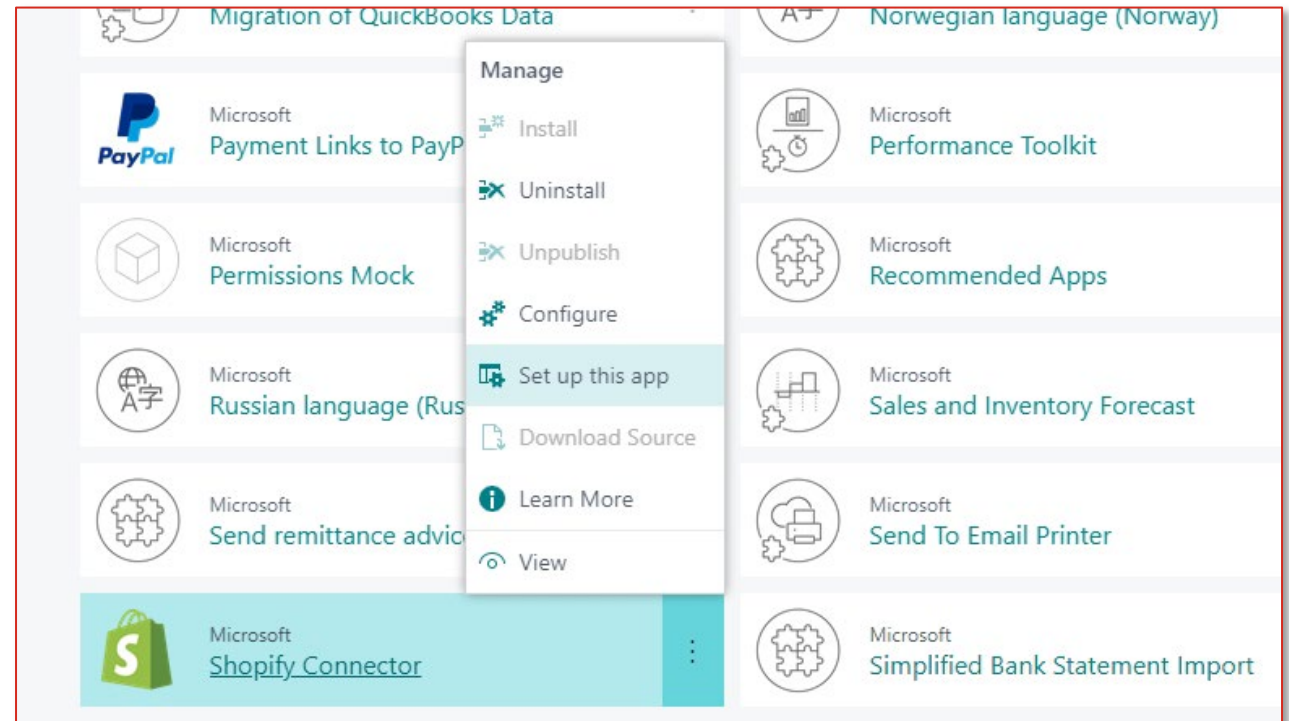
The screenshot shows the 'Licenses' page in the Microsoft 365 admin center. The left sidebar contains navigation options like 'Home', 'Users', 'Active users', 'Contacts', 'Guest users', 'Deleted users', 'Teams & groups', 'Billing', 'Purchase services', 'Your products', and 'Licenses'. The main content area shows 'Home > Licenses' and a 'Licenses' section with tabs for 'Subscriptions', 'Requests', and 'Auto-claim policy'. Below the tabs, there is a message: 'Select a product to view and assign licenses. Go to Your products to manage billing or buy more licenses.' There are 'Export' and 'Refresh' buttons. At the bottom, a table shows license information with columns for 'Name', 'Available licenses', and 'Assigned licenses'. The first row is 'Dynamics 365 Business Central Essentials' with 0 available licenses and a progress bar for assigned licenses (highlighted with a pink box).

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Administration

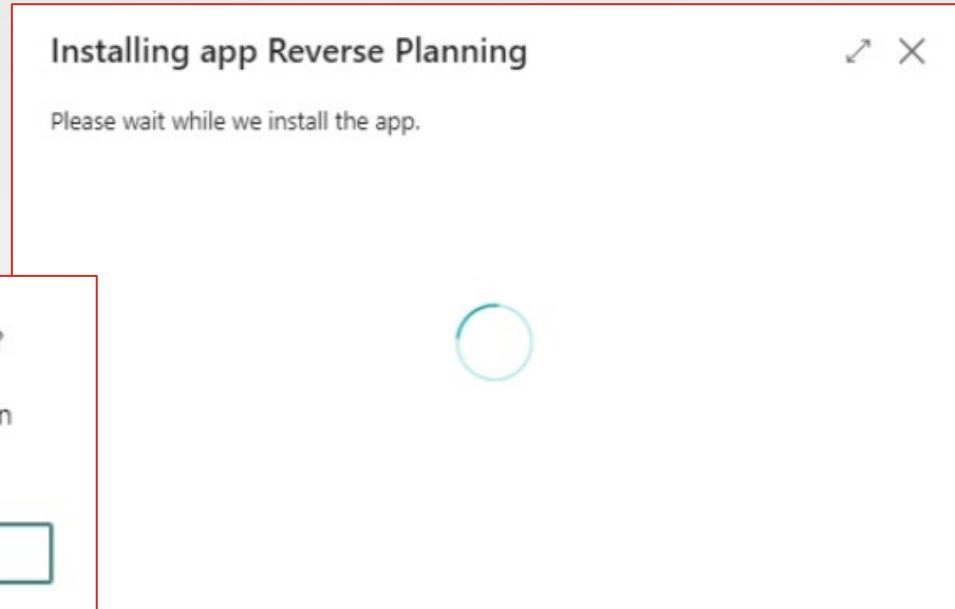
# Easily Access Setup Pages for New Apps

- Two new features have been added to the Extensions Management
- New Action on the Extensions Management Page
- Overview of setup pages

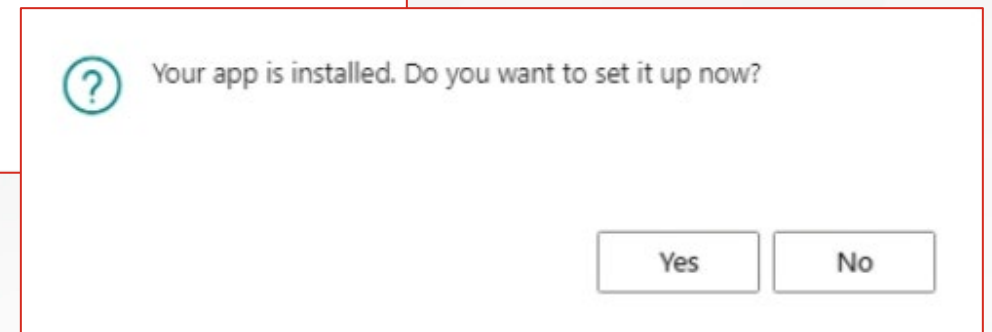
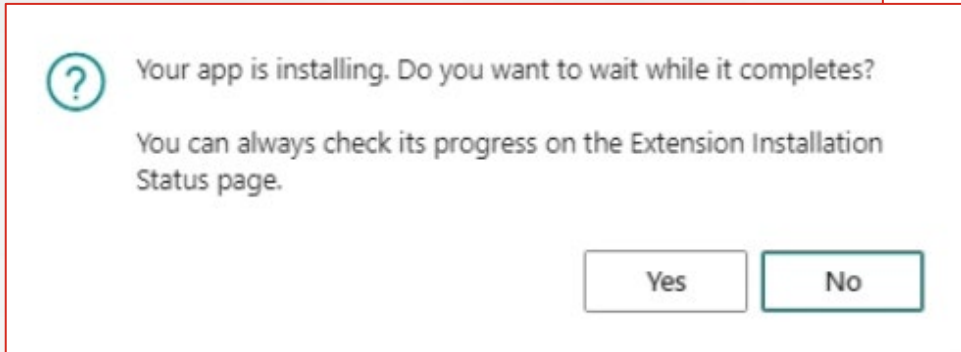


# Easily Install & Setup New Apps

The previous method



The updated method



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**Onboarding**

# Modern Action Bar

The action bar in its current state

Customer Card

10000 · Adatum Corporation

Process Approve Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Sales Order Sales Quote Sales Invoice Sales Credit Memo Reminder

No. 10000 Balance (\$) As Vendor

Name Adatum Corporation Balance Due (\$)

Balance (\$) 0.00 Credit Limit (\$)

Address & Contact

Address 192 Market Square Phone No.

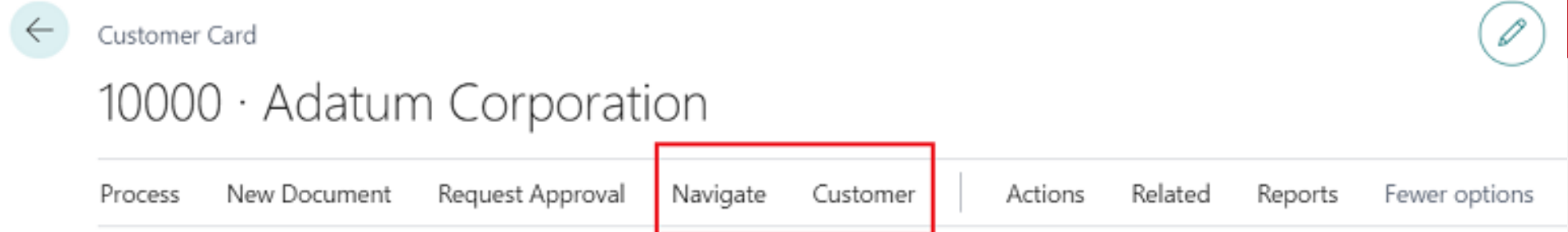
Mobile Phone No.

New Document

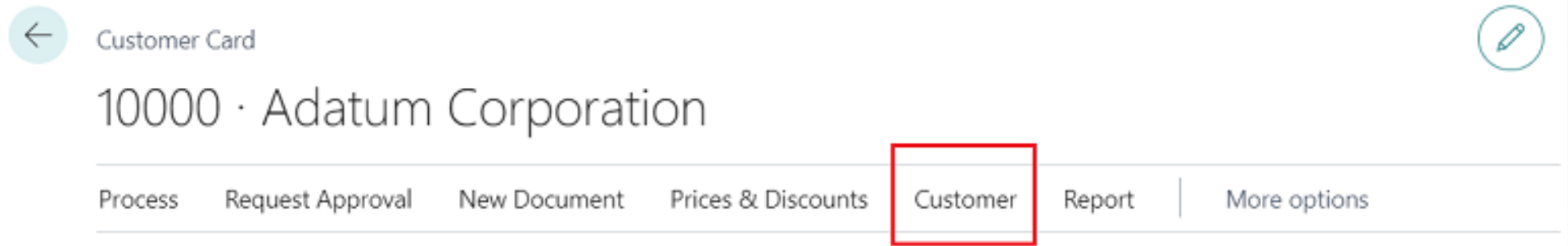
- Blanket Sales Order
- Sales Return Order
- Finance Charge Memo
- Other
  - Sales Quote
  - Sales Invoice
  - Sales Order
  - Sales Credit Memo
  - Reminder
- Use short menu

# Modern Action Bar

The Navigate menu will be retired



Release Wave 1 2022



Release Wave 2 2022

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# Modern Action Menu

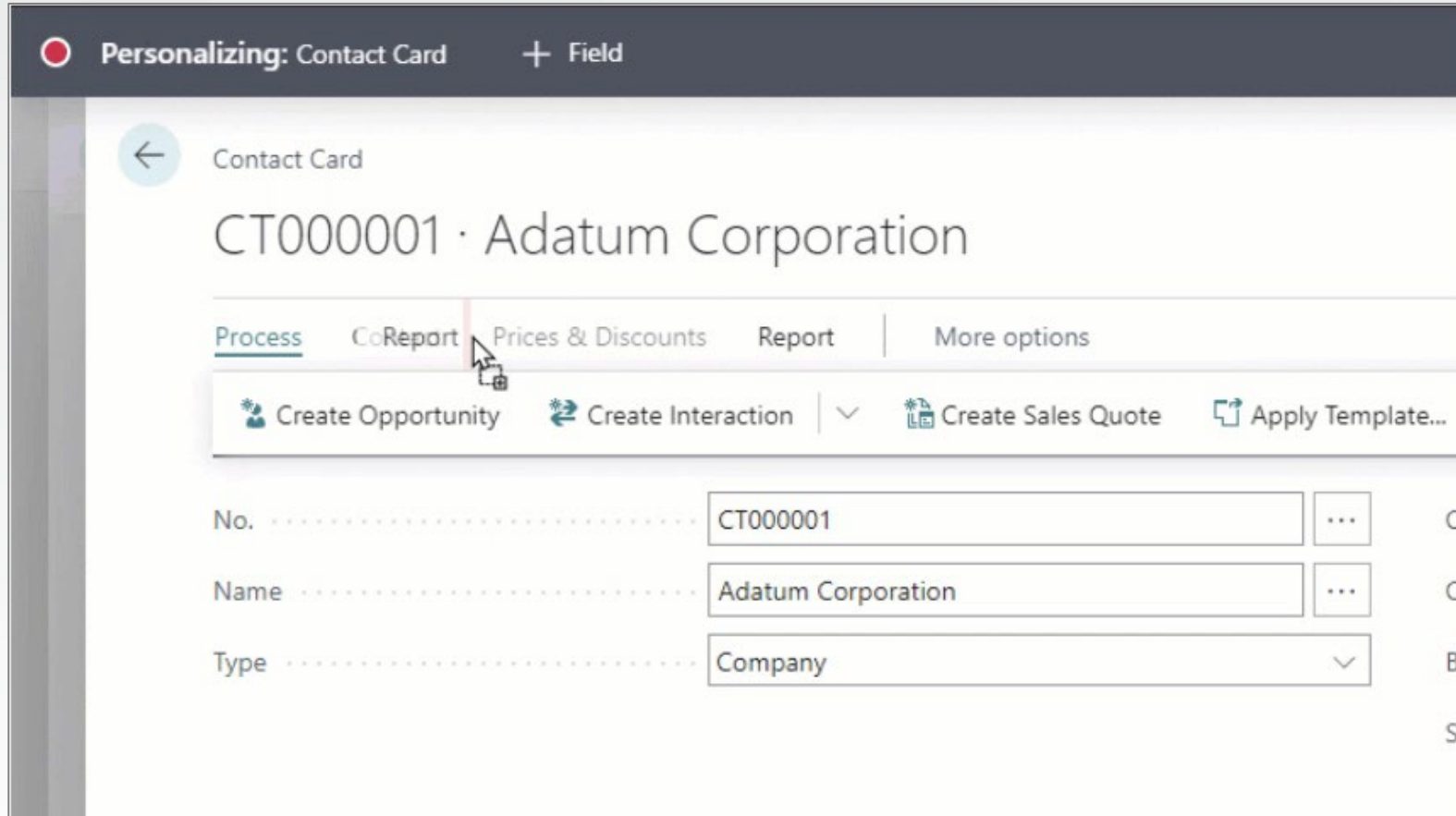
## Split Buttons

The screenshot displays a software interface for 'CRONUS USA, Inc.' with a navigation bar containing 'Finance', 'Cash Management', 'Sales', 'Purchasing', and 'Shopify'. Below the navigation bar is a 'Customers' section with a search bar and buttons for '+ New', 'Delete', 'Process', and 'New Document'. The main area shows a list of customers with their IDs, names, and contact information. An action menu is open over the list, showing options like 'Ledger Entries', 'Statistics', 'Dimensions-Multiple', 'Approvals', 'Comments', 'Contact', 'Sent Emails', 'Item Tracking Entries', 'Item References', and 'Return Orders'. The 'Dimensions-Multiple' option is highlighted in blue, and a red box highlights the 'Dimensions-Multiple' and 'Dimensions-Single' options.

Customer ID	Customer Name	Contact Name	Balance
10000	Adatum Corporation	Robert Townes	0.00
20000	Trey Research	Helen Ray	
40000	Alpine Ski House	Ian Deberry	4,316.92
50000	Relecloud	Jesse Homer	

- Ledger Entries
- Statistics
- Dimensions-Multiple
- Approvals
- Comments
- Contact
- Sent Emails
- Item Tracking Entries
- Item References
- Return Orders

# Modern Action Menu – Customize!



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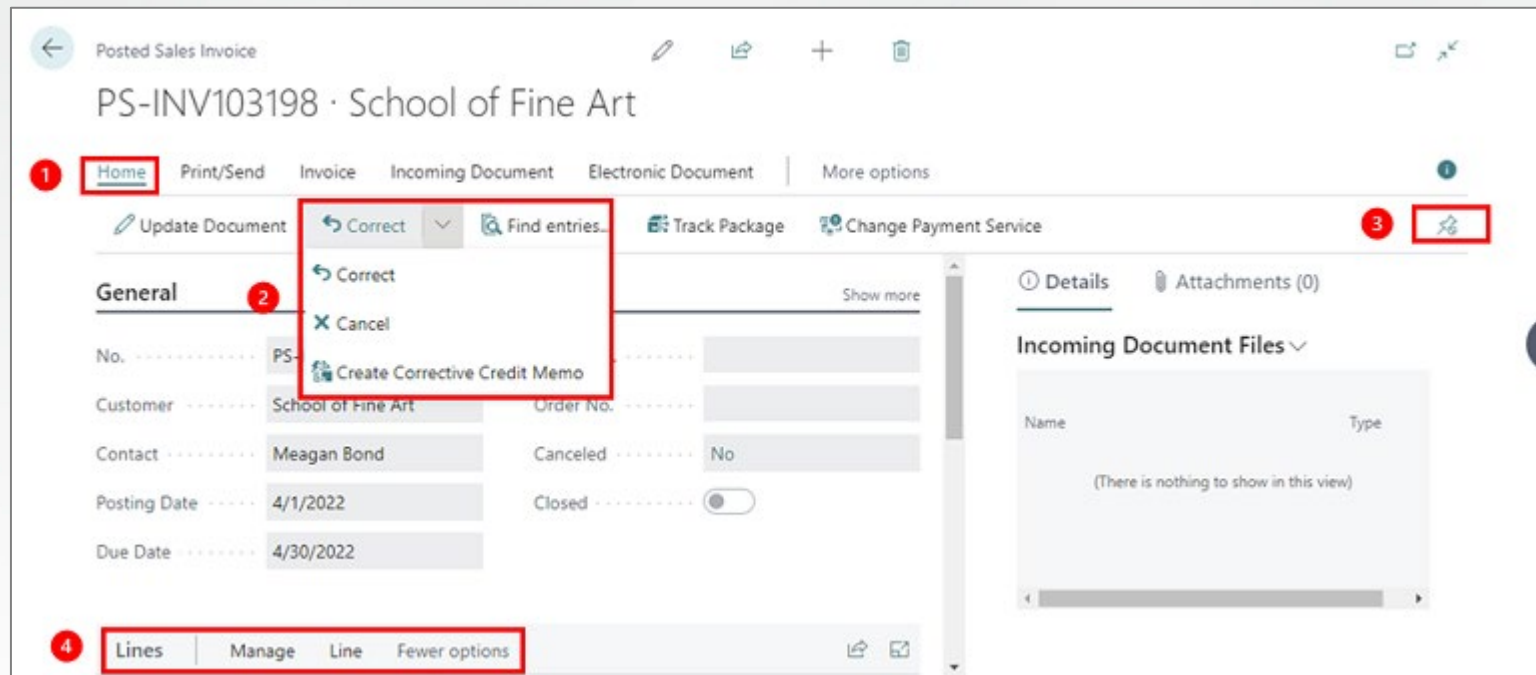


# Modern Action Menu

Optional changes to the action bar in 2022 release wave 2

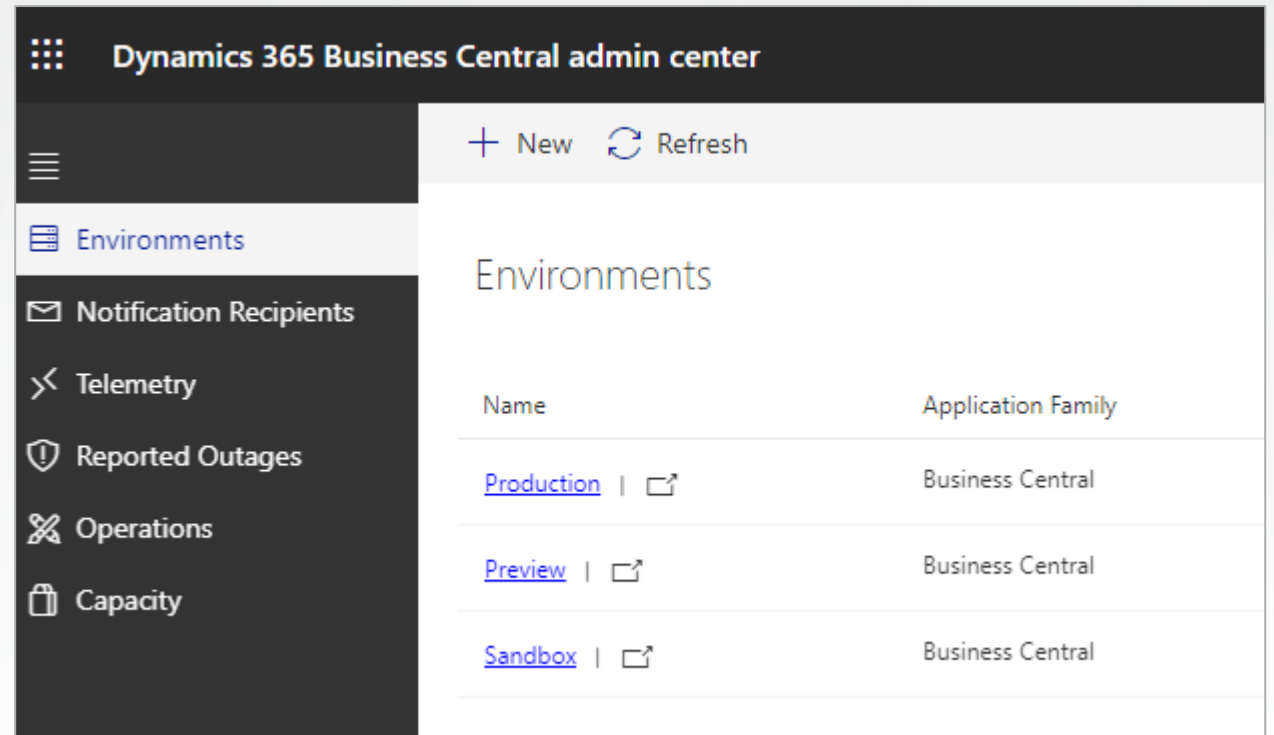
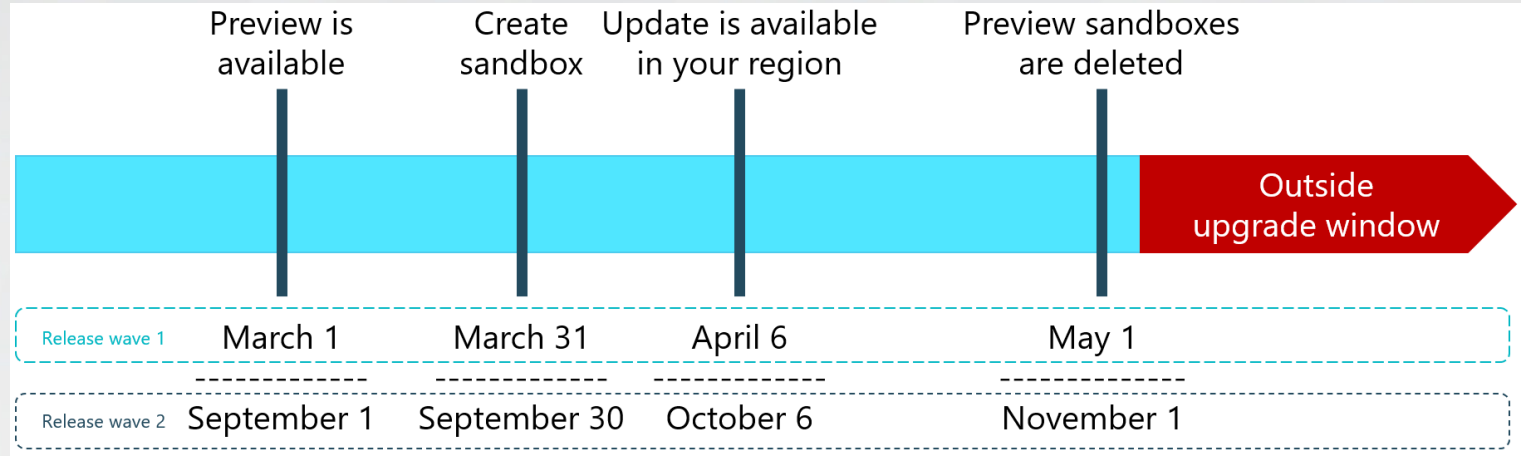
- Single users – try it out
- All Users – Feature management

- Process Tab Rename = Home
- Post/Release = Split Buttons
- Action Bar is now pinned
- Sub-page Actions are visible



# Try it out!

Prepare for major updates with preview environments



# Try it out!

Prepare for major updates with  
preview environments

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## 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

# See FORVIS at the Community Summit North America

- October 10-13, 2022 in Orlando, FL
- <https://www.summitna.com/>



**Charles Allen**  
Senior Managing  
Consultant



**David Rhue**  
Managing Consultant



**Suzie Moore**  
Senior Consultant II



**Holly Armitage**  
Managing Consultant



**Tiffany Bobbitt**  
Project Manager

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# Questions

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