

FORVIS[®]

The Easy Way to Import & Export Data in Business Central

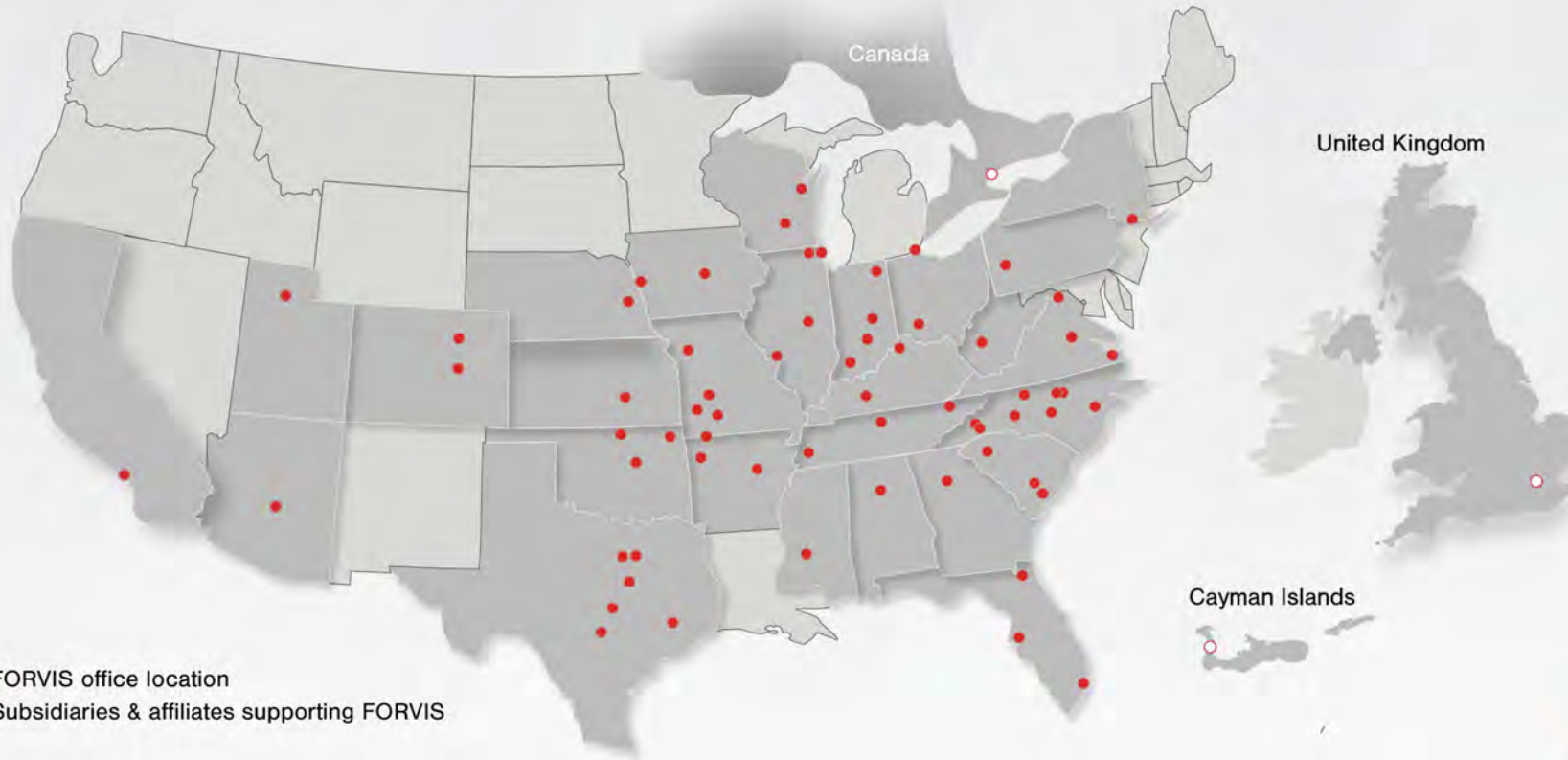
November 2023

Business Technology Solutions

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- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

Subsidiaries & Affiliates Supporting FORVIS

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By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members



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Business Technology Solutions

FORVIS provides 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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2022/2023
INNERCIRCLE
for Microsoft Business Applications

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FORVIS

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Partner

Sage Partner

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NETSUITE
Solution Provider

salesforce
PARTNER



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



Stephanie Saculles

D365 Business Central
Consultant

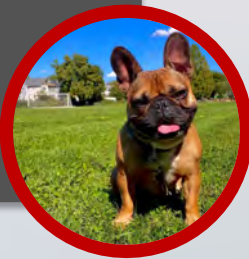
Lyka
Pawility Control



Molly Ullmann

D365 Business Central
Consultant

Bennie
Pawility Control



Today's Speakers

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The Easy Way to Import & Export Data in Business Central

November 2023

Business Technology Solutions

1

import/export options

2

edit in Excel

3

configuration packages

4

edit in Excel vs.
configuration packages

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agenda



Configuration Packages Edit in Excel

- Streamline processes
- Import/export tool
- Data changes
- Export for review
- Fix errors

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File Home Insert Draw Page Layout Formulas Data Review View Developer Help Power Pivot

Clipboard: Paste, Cut, Copy, Format Painter

Font: Calibri, 11, Bold, Italic, Underline, Text Color, Background Color

Alignment: Wrap Text, Merge & Center

Number: General, Percent, Decimals

Styles: Conditional Formatting, Format as Table, Cell Styles

Cells: Insert, Delete, Format

Editing: AutoSum, Fill, Clear, Sort & Filter, Find & Select

Analysis: Analyze Data

Edit in Excel

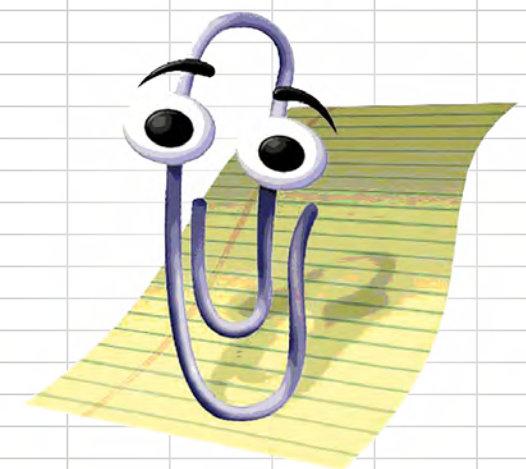
What is it?

Why is it beneficial?

Where can you use it in Business Central?

How do you use Edit in Excel tools?

What are some important fields?





Edit in Excel

Open in Excel

Publish & Edit

Data Import



 Open in Excel

 **Edit in Excel**

 Share to Teams

 Copy link

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20000	First Up Consultants			False	2023-09-25	5238.88	5238.88		FIRST UP CONSULTANTS			
30000	Graphic Design Institute			False	2021-09-23	-3045.48	-3045.48		GRAPHIC DESIGN INSTITUTE			
40000	Wide World Importers			False	2021-09-23	-36148.66	-36148.66		WIDE WORLD IMPORTERS			
50000	Nod Publishers			False	2021-09-23	464.97	464.97		NOD PUBLISHERS			
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Microsoft Dynamics

Data Connector BKD Technologies

- Source: Vendor_Card_Excel
- Field: No.

+ New

Refresh

Publish

Filter

Design

Why?

1. Amazing tool to simplify data entry
2. Quick & easy solution to edit data
3. Get the latest data when exporting
4. Work across environments & companies

Where?

Almost everywhere!



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What is it?

Why is it beneficial?

Where can you use it in Business Central?

How do you use Configuration Packages?

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Company Setup
Data Migration
Mapping
Sandbox Training

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**Streamline
Implementation**



**Configure New
Companies**



**Create Custom
Configuration
Package**



**Import & Export
Master Data**



Repair Data

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Documentation

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Which Do I Use?

Edit in Excel vs. Configuration Packages

Quicker

More Access Across Business Central

Modify Tables

Larger Data

Great for Journals

Updating Where Edit in Excel Can't

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For more information about Implementing Business Central, please

- Visit our website at <https://www.forvis.com/services/microsoft-dynamics-365-business-central>
- Or email us
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