

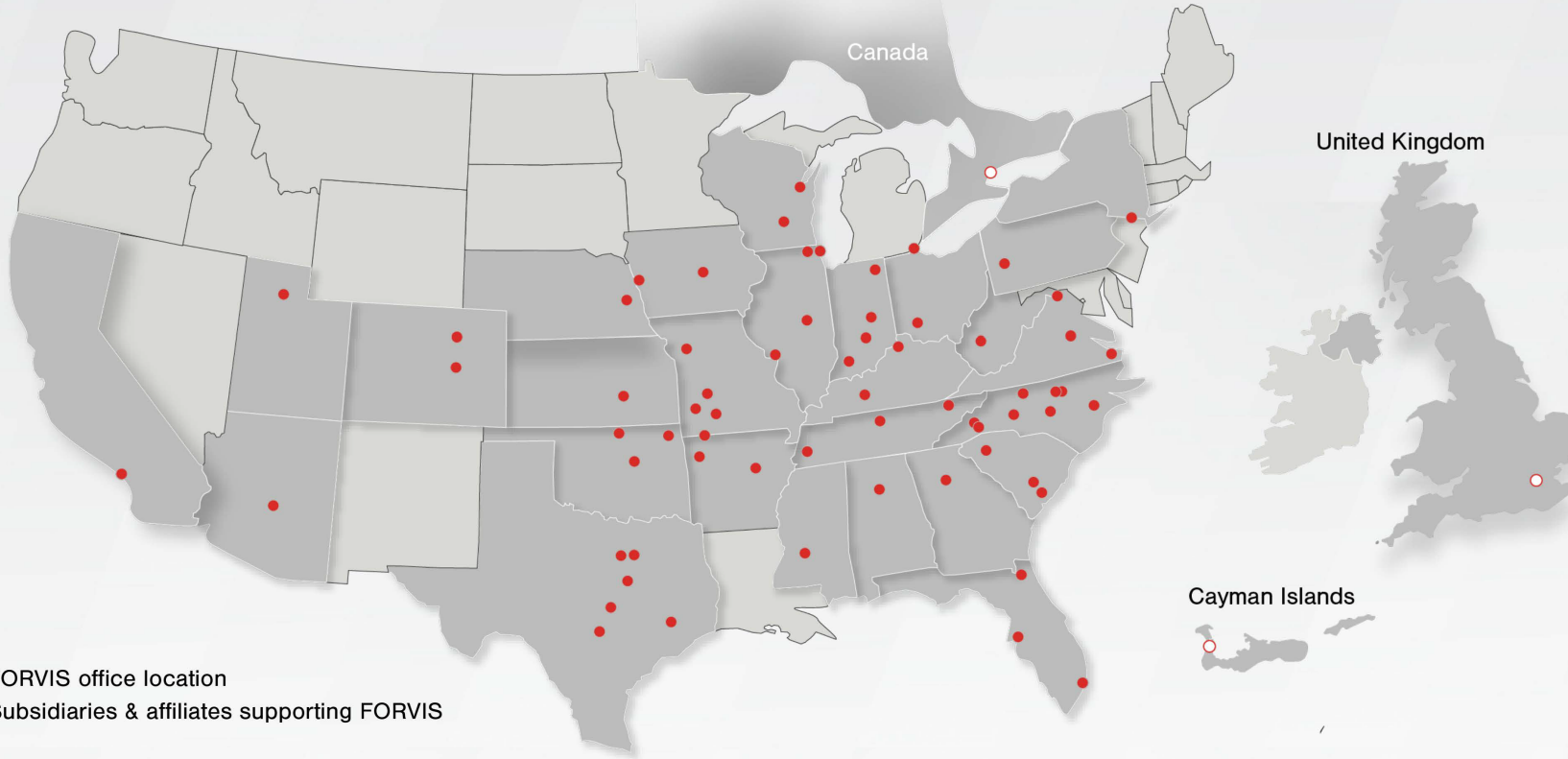
# FORVIS<sup>®</sup>

## See What's New in Dynamics 365 Business Central 2024 Wave 1

May 16, 2024

Business Technology Solutions

# Global Presence & Reach



- FORVIS office location
- Subsidiaries & affiliates supporting FORVIS

## Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Canada ULC\*\*
- FORVIS Global Advisory Ltd. UK\*\*
- TALENT SHIFT, LLC

**FORVIS**

## 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



FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

# 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.

Microsoft Partner

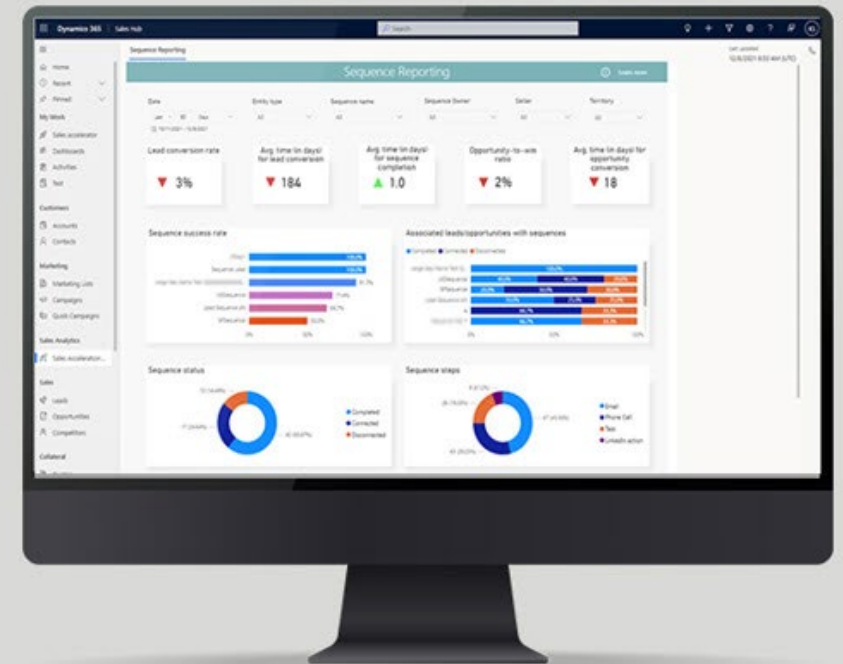
We are a Microsoft Partner, value-added reseller (VAR), and recipient of the Microsoft Inner Circle Award.

Microsoft  
Partner

Sage Partner

ORACLE  
NETSUITE  
Solution Provider

salesforce  
PARTNER



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

# Today's Speakers



**Stephanie Saculles**

---

Business Central  
Consultant



**Jeremy Adkins-Hill**

---

Managing Consultant



# FORVIS<sup>®</sup>

## See What's New in Dynamics 365 Business Central 2024 Wave 1

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Business Technology Solutions



# Agenda

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- **Field Service Integration**
- **Service**
- **Projects**
- **Archiving**
- **Copilot**
- **Reports**
- **Shipping**
- **Errors**

A photograph of a wind farm with several white wind turbines against a clear blue sky with a few wispy clouds. A large teal circle is overlaid on the left side of the image, containing the text 'Integrate Field Service' in white.

# Integrate Field Service



**Create a Work Order**



**Add Inventory**



**Add Service Items**



**Project Journals**



**Job Planning Lines**







# Service Features

# Block Items From Service Orders

Item Card

Item Variant Card

Item Templates

Service Item Card ✎ 🔗 + 🗑️

SV000009 · S-100 Semi-Automatic

Item Troubleshooting | Actions ▾ Related ▾ Reports ▾ Automate ▾ Fewer options

**General**

No. ....	SV000009	...	Priority .....	Low	▾
Description .....	S-100 Semi-Automatic		Last Service Date .....		
Item No. ....	S-100	▾	Warranty Starting Dat...		📅
Item Description .....	S-100 Semi-Automatic		Warranty Ending Date...		📅
Service Item Group C...	SERVICE	▾	Blocked .....		▾
Service Price Group C...		▾			
Variant Code .....		▾			

Service Contract  
All

# Manage Document Attachments

Attached Documents

Search + New Edit List Delete Download Open in OneDrive

Attachment	File Extension	File Type	Attached Date	Flow to Purch. Trx	Flow to Sales Trx	Flow to Service Trx
→ <a href="#">Service Specification</a>	docx	Word	1/31/2024 11:...	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Service-Related Documents

Go to Attachments From Lines

Attach as PDF

# Service Invoice Posting

**Allowed (Default)**

---

**Service Orders & Invoices**

---

**Prohibited**

---

**Service Credit Memos**

---

**Mandatory**

---

**Warehouse Shipments**

---



# Standard Terminology

Jobs are now  
Projects

Will not affect  
existing  
integrations &  
customizations

Improved  
user  
experience

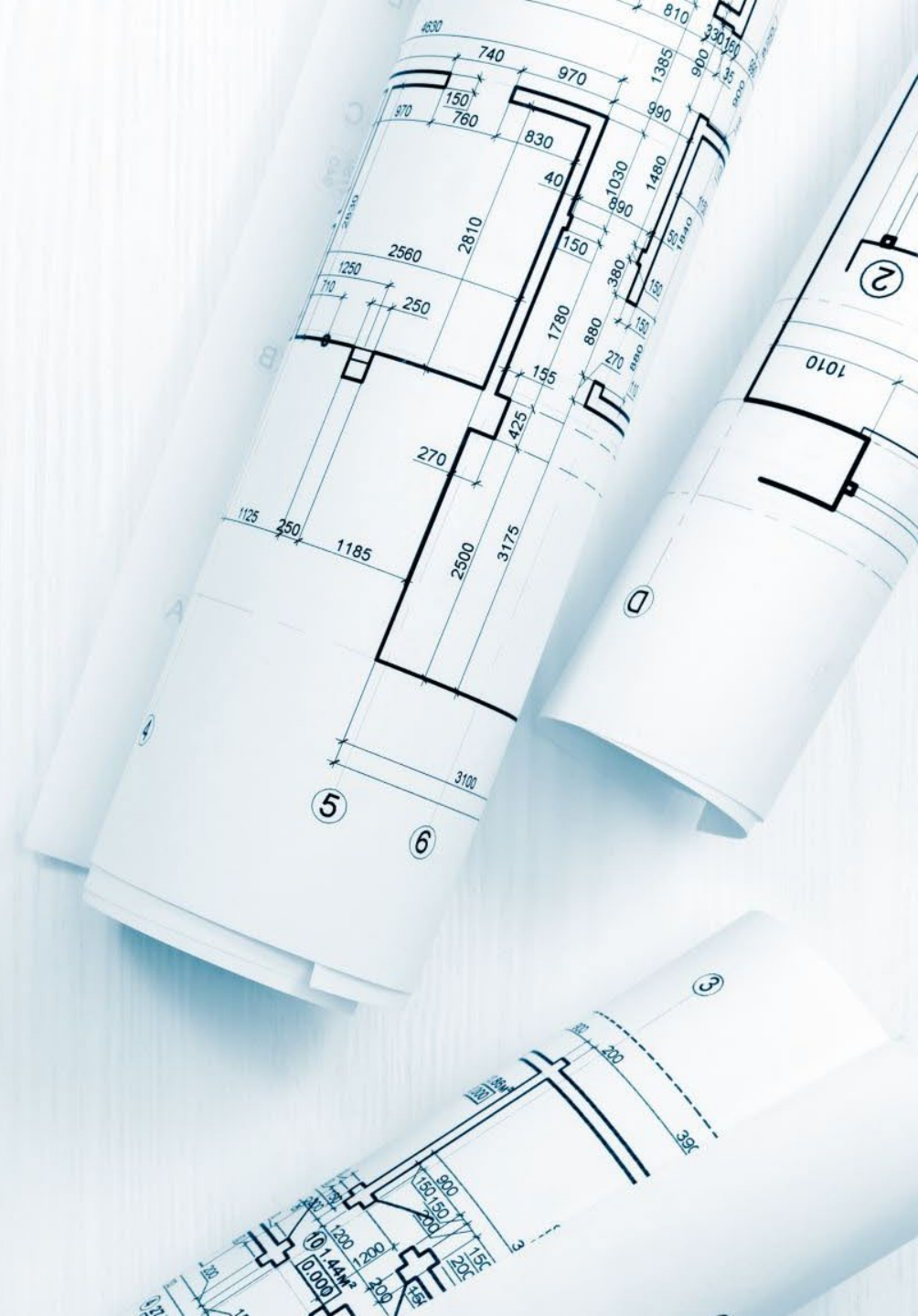


# Assemble to Project

Based on  
Project  
Planning Line

Assembly  
Order  
Reserved for  
Project

Fully  
Integrates With  
Various  
Warehouse  
Configurations



**Project  
Tasks**

**Project  
Planning  
Lines**

**Project  
Journal  
Lines**

**Default  
Location for  
Project**





# Project Invoicing

Project Task Card

Project Setup

Specify Bill-To & Sell-To Customers

Tasks | Manage | Line

[Edit](#) [View](#) [New](#) [New Line](#) [Delete Line](#)

Project Task No.	Description	Project Task Type	Customer No.	Bill-to Customer No.	Start Date
<b>100</b>	<b>Phase 1 - Planning and specs</b>	Begin-Total			—
110	Pre-installation requirements	Posting	10000	20000	2/6/2024
<b>199</b>	<b>Phase 1 - Total</b>	End-Total			—
<b>200</b>	<b>Phase 2 - Installation</b>	Begin-Total			—
220	⋮ Delivery	Posting	30000	30000	2/6/2024
240	Installation	Posting	10000	10000	2/6/2024
→ 260	⋮ Configuration	Posting	10000	10000	2/6/2024
<b>299</b>	<b>Phase 2 - Total</b>	End-Total			—

No. ↑ Name

→ 10000 Adatum Corporation

20000 Trey Research

## Projects Setup

### General

Show more

Automatic Update Pr...

Default WIP Posting ... Per Project

Apply Usage Link by ...

Default Project Postin... SETTING UP

Allow Budget/Billable ...

Default Task Billing M... One customer

Default WIP Method ...

Default Task Billing Method Multiple customers

Specify whether to use the customer specified for the project for all tasks or allow people to specify different customers. One customer lets you invoice only the customer specified for the project. Multiple customers lets you invoice customers specified on each task, which can be different customers.

### Numbering

Project Nos. ...

Ask Copilot



# Archiving Features

# Projects

Change Status or Delete Document

Print, Download, or Send via Email

Post an Invoice

The image shows a software interface for project management. The top section is titled "Projects Setup" and includes a "General" tab and a "Numbering" section. Below this is an "Archiving" section with a dropdown menu for "Archive Projects" set to "Always". The bottom section is titled "Project Archive Card" for "JOB00010 · Reception area remodel · 1". It has tabs for "Home", "Project", and "More options". A "Restore..." button is visible. A dialog box is overlaid on the bottom right, asking "Do you want to Restore Project JOB00010 Version 1?" with "Yes" and "No" buttons.

Purchase Order

106009 · First Up Consultants

Home Prepare Print/Send Request Approval Order More options

Post... Release... Create Whse. Receipt Create Inventory Put-away/Pick... Send Intercompany Purchase Order Archive Document

**General** Show more

Vendor Name: First Up Consultants No. of Archived Versions: 1

Contact: Evan McIntosh

Document Date: 4/8/2024

Vendor Invoice No.: 123

Vendor Shipment No.:

Status: Released

**Incoming Document Files**

Name	Type
M160232980046709	PDF
<b>Supporting Attachments</b>	
Racun-753-1-1	PDF

**Buy-from Vendor History**

Vendor No.: 20000

Quoties	Blanket Orders	Orders
0	0	1
Invoices	Return Orders	Credit Memos
0	51	50

Type	Quantity	Unit of Measure Code	Direct Unit Cost Excl. Tax	Line Amount Excl. Tax	Qty. to Receive	Quantity Received	Qty. to Invoice	Quantity Invoiced	Qty. to Assign	Item Charge Qty. to Handle	Qty. Assigned	Promised Receipt Date	Pl. Rec
Item	1	PCS	780.70	780.70			1	1	0				4/E

Subtotal Excl. Tax (USD): 780.70 Total Excl. Tax (USD): 780.70

Inv. Discount Amount (USD): 0.00 Total Tax (USD): 46.04

Invoice Discount %: 0 Total Incl. Tax (USD): 827.54

Incoming Docs

Purchasing & Sales

Orders

Quotes

Purchase Order Archive

106009 · First Up Consultants · 1

Home Order More options

Print

**General** Show more

No.: 106009

Buy-from Vendor No.: 20000

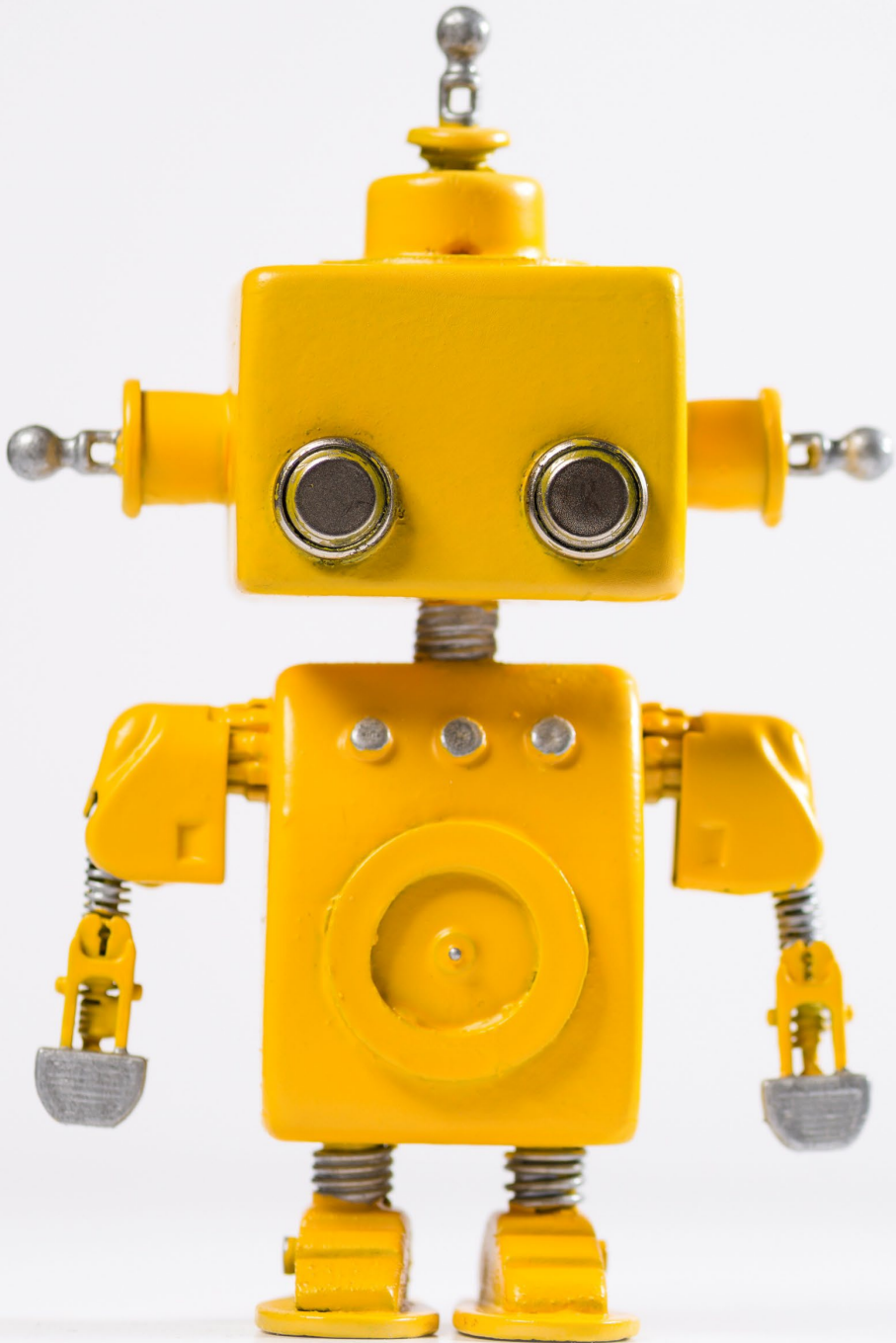
Buy-from Contact No.: CT000013

**Buy-from**

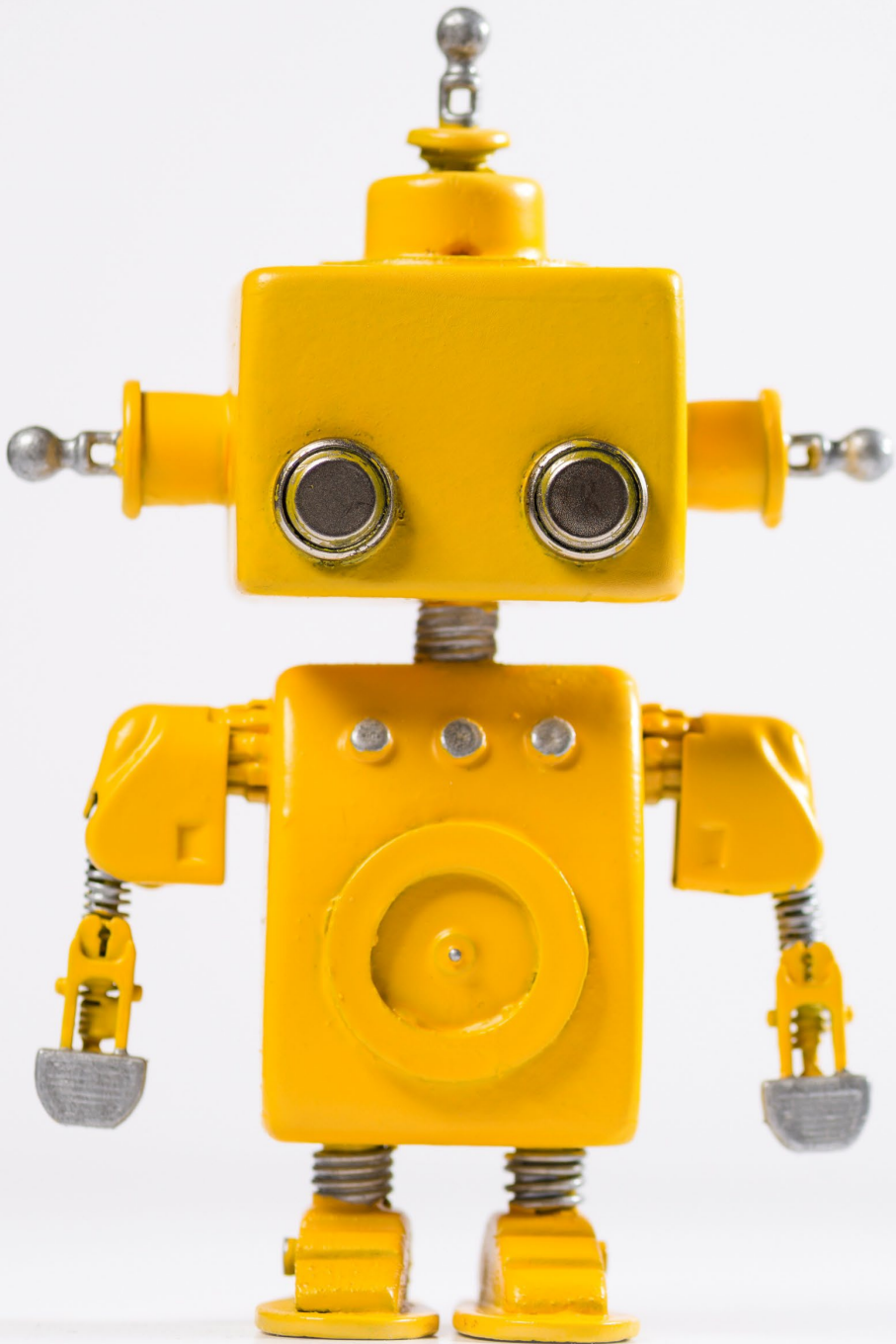
Name: First Up Consultants

**Incoming Document Files**

Name	Type
M160232980046709	PDF
<b>Supporting Attachments</b>	
Racun-753-1-1	PDF



# Copilot Features



Create Power  
Automate Flows



Chat With Copilot

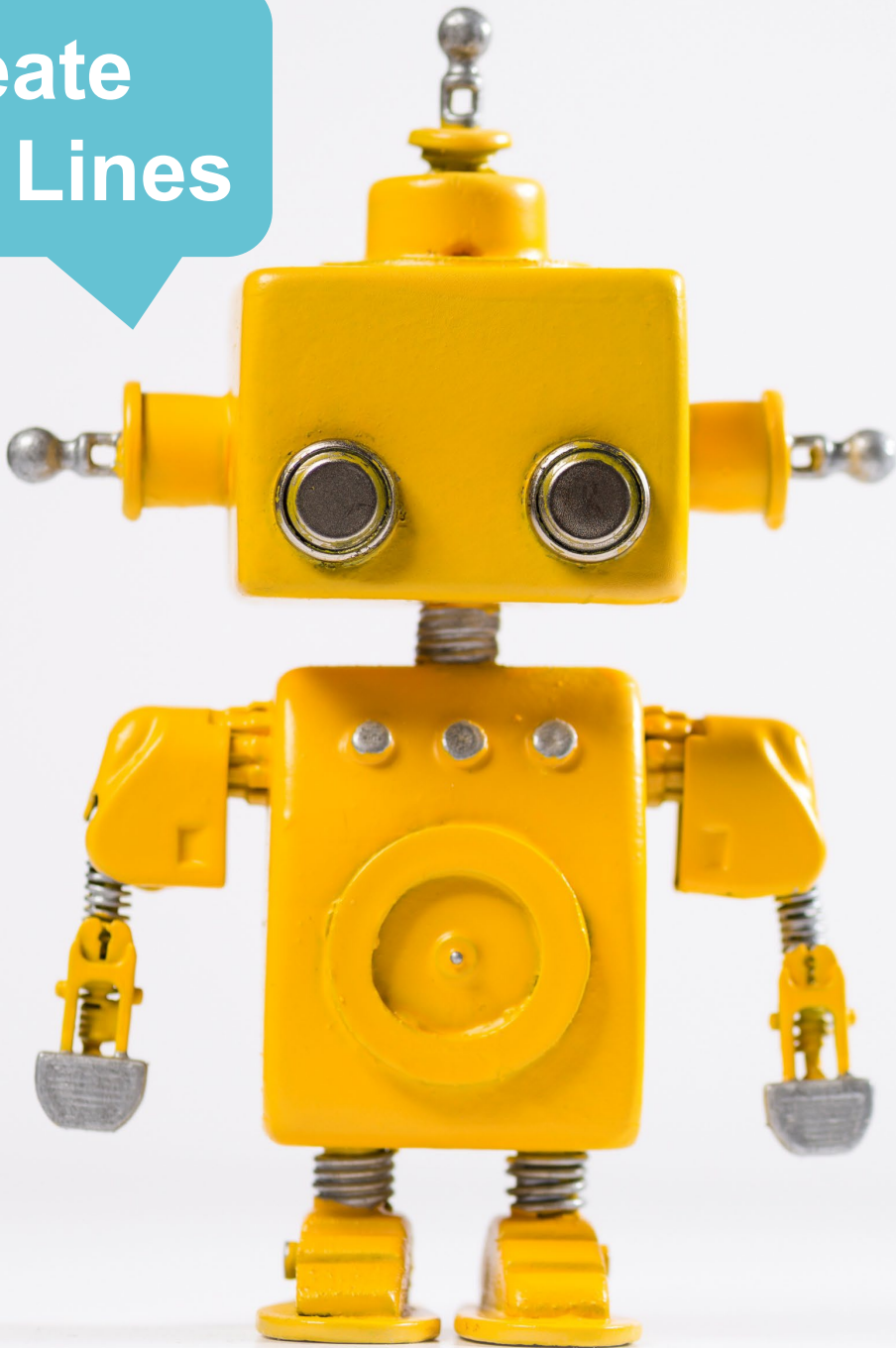


Extend Copilot



Ask Copilot for  
Help With Fields

# Create Sales Lines



Sales Orders: All ▾

No. 1

- S-ORD101001
- S-ORD101002**
- S-ORD101003
- S-ORD101004
- S-ORD101005
- S-ORD101006
- S-ORD101007
- S-ORD101008
- S-ORD101009
- S-ORD101010

## S-ORD101002 · Adatum Corporation

Home Prepare Print/Send Request Approval Order Report More options

### General

Customer Name ..... Adatum Corporation ... Due Date ..... 6/1/2023

Contact ..... Robert Townes ... Requested Delivery D... 5/2/2023

Document Date ..... 5/1/2023 External Document No. ...

Posting Date ..... 5/1/2023 Status ..... **Open**

Order Date ..... 5/1/2023

Lines | **Manage** | Line | Order

Get line suggestions... ▾ | New Line | Delete Line | Select items...

Type	No.	Item Reference No.	Description	Location Co
Item	1968-S		MEXICO Swivel Chair, black	

Lines | **Manage** | Line | Order

### Suggest lines with Copilot

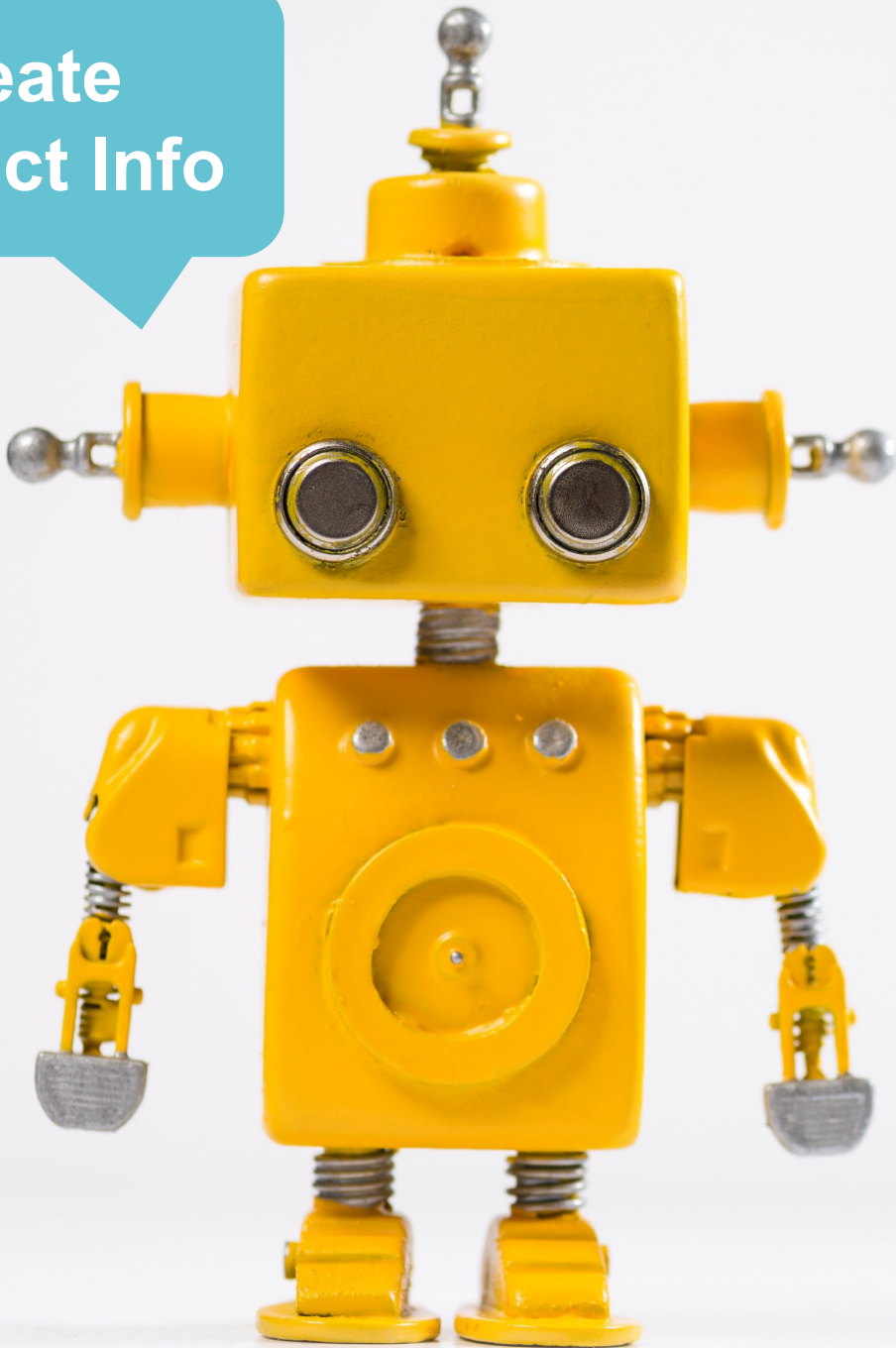
Describe the order you'd like to create, and Copilot will get you started

Generate

- An order for <customer> with 2 <items>
- Copy previous order from customer ...
- Create with lines from this bullet list ...
- Turn the attached Excel into an order

Subtotal Excl. Tax (USD) ... Total Excl. Tax (USD) ...

# Create Product Info



1928-S · AMSTERDAM Lampe

Item Variants | Search | Analyze | + New | Edit List | Delete | Edit | View | ...

Code ↑	Description	Blocked	Sales Blocked	Purchasing Blocked
→		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Suggest Variants

1928-S · AMSTERDAM Lampe

Item Variants | Search | Analyze | + New | Edit List | Delete | Edit | View | ...

Suggest Item Variants

AI-generated content may be incorrect

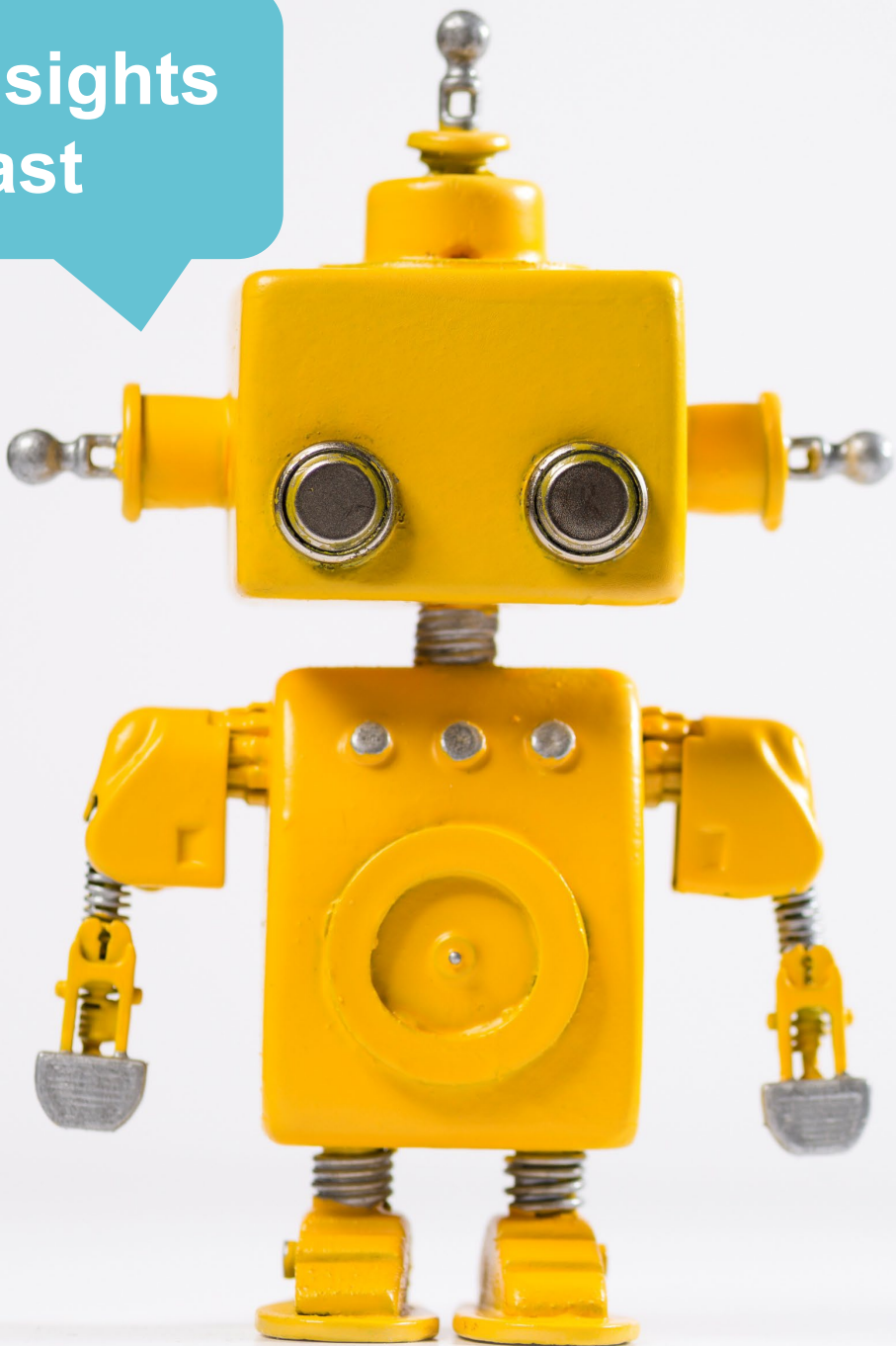
Code ↑	Description
→ RED-S	Red, Small
RED-M	Red, Medium
RED-L	Red, Large
BLACK-S	Black, Small
BLACK-M	Black, Medium
BLACK-L	Black, Large
YELLOW-S	Yellow, Small
YELLOW-M	Yellow, Medium
YELLOW-L	Yellow, Large

Keep it

Add all previously used colors. Exclude size XS



Get Insights  
Fast



Items: All | Search | + New | ...

No. ↑ | Description | Type | Quantity on Hand | Subst Exist

Analyze Items Preview Terms of use Learn more X

Group items by type and UoM

Generate

Items: All | Search | Analysis 1 | Items by type and UoM | Filter

Type / Base Unit of Measure	Pivot Mode
Inventory (57)	<input type="checkbox"/>
> PCS (54)	<input type="checkbox"/>
> CAN (3)	<input type="checkbox"/>
Sub Total 0	<input type="checkbox"/>
> Service (3)	<input type="checkbox"/>
Total	<input type="checkbox"/>

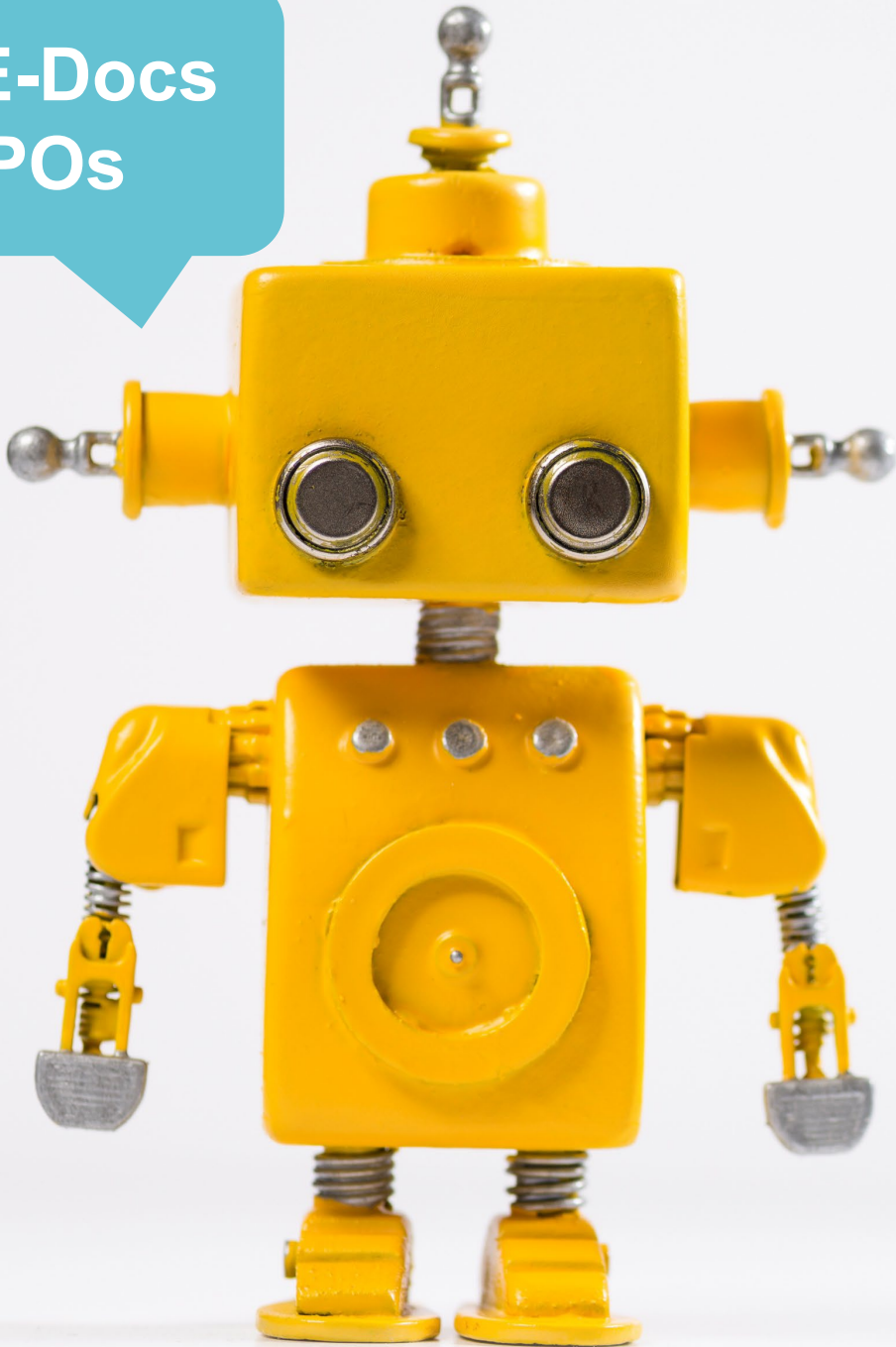
Columns: No., Description, Type, Quantity on Hand, Substitutes Exist, Assembly BOM, Base Unit of Measure, Cost is Adjusted

Analysis filters: Row Groups (Type, Base Unit of Measure), Values (Sum/Quantity on Hand)

Analysis: Group items by type and UoM Preview AI-generated content may be incorrect Terms of use Learn more

Keep it Discard Add more details about the analysis

# Map E-Docs to POs



E-Document Match Order Lines with Copilot [Preview](#) AI-generated content may be incorrect [Terms of use](#) [Learn more](#)

Auto-matched ..... 0 of 6 lines (0%) **All lines (100%) are matched. Review match proposals.**

Copilot matched ..... 6 of 6 lines (100%) Invoice Total Amount ... 12,100.00

E-Document No. .... 11 Matched Total Amoun... 12,100.00

Match proposals [Delete Line](#)

E-Document Line No. ↑	E-Document Line Description	Matched Quantity	Proposal
10000	Colombian Roasted Coffee	20	Matched to Purchase Order Line 10000
20000	Rio BR Whole Roasted Beans	20	Matched to Purchase Order Line 20000
30000	Fortaleza BR Whole Roasted Beans	20	Matched to Purchase Order Line 20000
50000	Espresso Roast. Beans, Mexico	20	Matched to Purchase Order Line 30000
60000	Mexican Mocha Beans	10	Matched to Purchase Order Line 30000
→ 40000	Indonesian Coffee Whole Bean	25	Matched to Purchase Order Line 40000

Keep it  Discard it

# Reporting Features



## Analysis

---

- Queries
- Reports
- Power BI
- Excel or PDF
- Pivot Tables



## Interactive

---

Use Excel to  
interactively  
generate analyses  
& present  
learnings



## Templates

---

Use as template  
to create your  
own Excel layouts  
for the same data



A woman with long, wavy brown hair, wearing a dark blue puffer vest over a light-colored shirt, is looking at a tablet computer in a warehouse setting. The background shows tall metal shelving units filled with cardboard boxes. A large blue circle is overlaid on the right side of the image, containing the text 'Shipping Features' in white, bold, sans-serif font.

# Shipping Features

# Package Specific Tracking

## Phys. Invt. Item Track. List



Item Tracking Information

Item No.	Variant Code	Location Code	Serial No.	Lot No.	Package No.	Positive	Quantity
1001	VAR1		111111		CT000024	<input checked="" type="checkbox"/>	1
1001	VAR1		SN000022			<input checked="" type="checkbox"/>	1
1001	VAR1		SN000055		CT000024	<input checked="" type="checkbox"/>	1
1001	VAR1		SN00002		CT000024	<input type="checkbox"/>	-1
1001	VAR1		SN00005	LOT0001	CT000024	<input type="checkbox"/>	-1

# Assign Salesperson to Ship-To

← Ship-to Address ✎ 🏠 + 🗑️ ✓ Saved 📧 🔗

10000 Adatum Corporation LEWES ROAD  
Adatum Corporation

**General** Show more

Code	LEWES ROAD	Contact	
Name	Adatum Corporation	Salesperson Code	HR
GLN		Location Code	
Address	2 Lewes Road	Tax Liable	
Address 2		Tax Area Code	
City	Atlanta		
State	GA		
ZIP Code	31772		
Country/Region Code	US		

[Show on Map](#)

Code ↑	Name
→ HR	Helena Ray
JO	Jim Olive
LT	Lina Townsend
OF	Otis Falls
RB	Robin Bettencourt
+ New	

[Show details](#) [Select from full list](#)

Customer No.

An aerial, high-angle photograph of a dense urban skyline, likely New York City, showing numerous skyscrapers and buildings. A large, semi-transparent teal circle is overlaid in the center of the image. Inside this circle, the words "Error" and "Features" are written in a large, white, sans-serif font, stacked vertically. The background of the circle has a faint, light-colored circuit board pattern.

# Error Features



# Fixing Errors

Copy Details

Go Directly to Page Causing Field Error

Take Action

Financial Report for R...

M-RETAIND

Additional Reporting ...

USD

VAT Exchange Rate A...

Residual Gains Account must have a value in Currency: Code=USD. It cannot be zero or empty.

Show Currency Card



Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code
10	...	-	PCS

Status must be equal to 'Open' in Sales Header: Document Type=Order, No.=S-ORD101001. Current value is 'Released'.

0 Total Tax (USD)  
16,767.60 Total Incl. Tax (USD)

- Copy error details
- Share details to Teams
- Share details via email

# Error Details

## Line Details

## Error Dialog

## Share to Teams

## Share via Email

! Time Sheet Nos. must have a value in Resources Setup: Primary Key=. It cannot be zero or empty.

Share details ▾

- Copy error details
- Share details to Teams
- Share details via email

Copy error details to clipboard

OK



For more information about Implementing Business Central, please

- Visit our website at [www.forvis.com/services/microsoft-dynamics-365-business-central](http://www.forvis.com/services/microsoft-dynamics-365-business-central)
- Or email us
  - [stephanie.saculles@forvis.com](mailto:stephanie.saculles@forvis.com)
  - [jeremy.adkinshill@forvis.com](mailto:jeremy.adkinshill@forvis.com)

**FORVIS**

# Questions?

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# Thank you!

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Assurance / Tax / Consulting