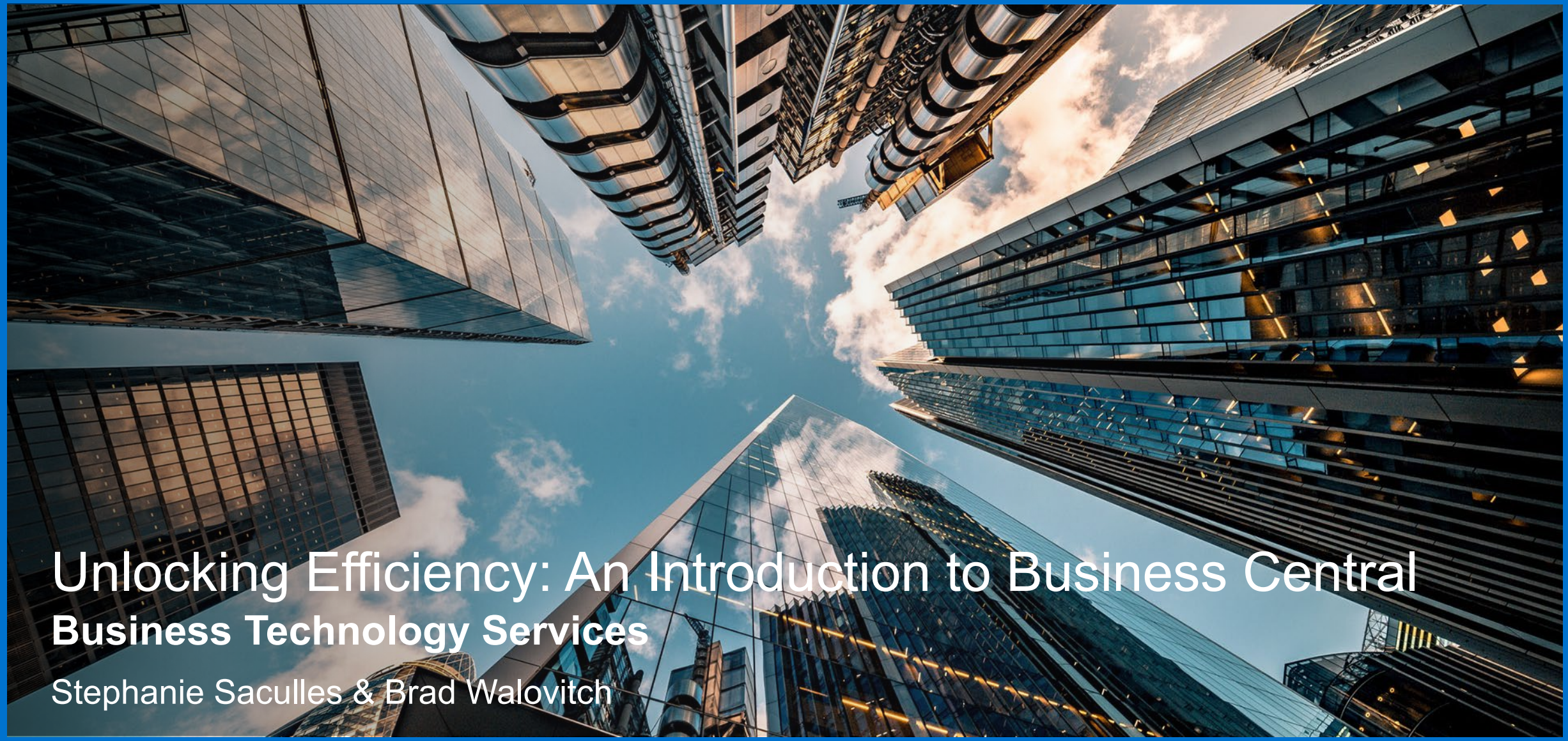

Unlocking Efficiency: An Introduction to Business Central

Business Technology Services

Stephanie Saculles & Brad Walovitch

Microsoft Partner

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Global Presence

Top 10
Global Network*

$5bn
Combined Revenue (2023)

100+
Combined Countries & Territories

400+
Combined Offices & Locations

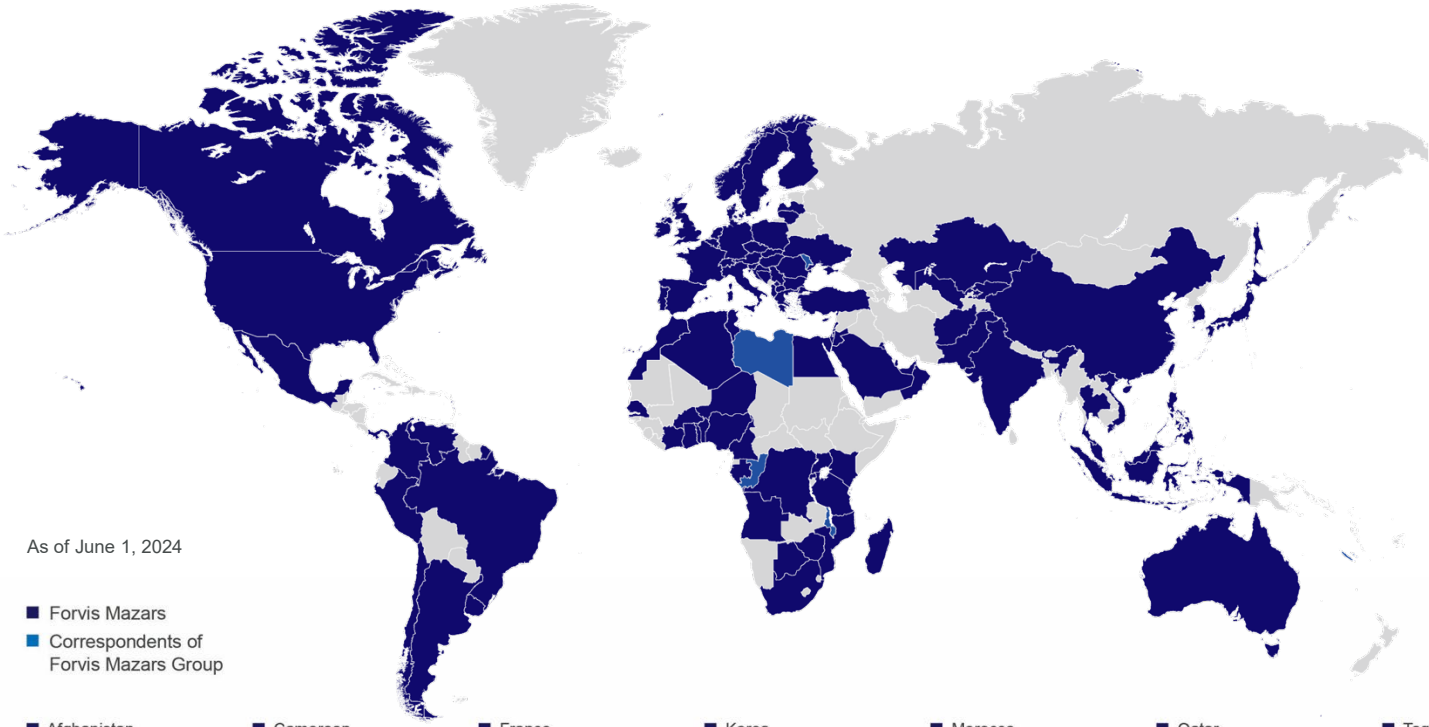
1,800+
Combined Partners

40,000+
Combined Employees

* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS $1.7bn (€1.6bn), Mazars (expected) $3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



- Afghanistan
- Albania
- Algeria
- Angola
- Argentina
- Australia
- Austria
- Bahrain
- Belgium
- Benin
- Bermuda
- Bosnia and Herzegovina
- Botswana
- Brazil
- Bulgaria
- Burkina Faso
- Cameroon
- Canada
- Cayman Islands
- Chile
- China
- Colombia
- Congo
- Côte d'Ivoire
- Croatia
- Cyprus
- Czech Republic
- Democratic Republic of the Congo (DRC)
- Denmark
- Egypt
- Finland
- France
- Gabon
- Germany
- Ghana
- Greece
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Jordan
- Kazakhstan
- Kenya
- Korea
- Kosovo
- Kuwait
- Kyrgyzstan
- Latvia
- Lebanon
- Libya
- Lithuania
- Luxembourg
- Madagascar
- Malawi
- Malaysia
- Malta
- Mauritius
- Mexico
- Moldova
- Morocco
- Mozambique
- Netherlands
- New Caledonia
- Niger
- Nigeria
- North Macedonia
- Norway
- Oman
- Pakistan
- Palestine
- Panama
- Peru
- Philippines
- Poland
- Portugal
- Qatar
- Romania
- Rwanda
- Saudi Arabia
- Senegal
- Serbia
- Singapore
- Slovakia
- Slovenia
- South Africa
- Spain
- Sweden
- Switzerland
- Taiwan
- Tanzania
- Thailand
- Togo
- Tunisia
- Türkiye
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- Uruguay
- Uzbekistan
- Venezuela
- Vietnam
- Zimbabwe

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Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions

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Business Technology Services

ERP

- Microsoft Dynamics 365
  - Finance
  - Supply Chain
  - Commerce
  - Project Operations
  - Business Central
  - Dynamics GP
- NetSuite
- Sage & Sage Intacct
- Trimble Viewpoint Spectrum & Vista

CRM

- Microsoft Dynamics 365
  - Sales
  - Customer Service
  - Customer Insights
  - Field Service
- Salesforce
- Marketing Automation

Advanced Technology

- Insights
  - Microsoft Power BI
  - Solver Planning & Analysis
- Automation
  - Microsoft Power Platform
  - Robotic Process Automation (RPA)
- App Development

Managed Services for business applications, IT, & cybersecurity support.

Microsoft Partner

ORACLE NETSUITE Solution Provider

Sage Partner

salesforce PARTNER

solver

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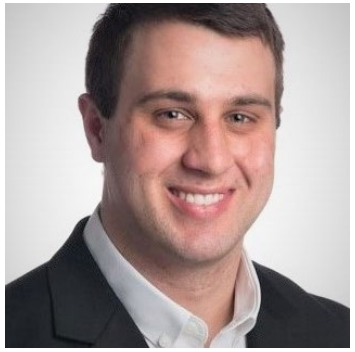
Today’s Speakers

Microsoft Practice

“Our team is focused on delivering an Unmatched Client Experience® on every engagement.”

– Chad Back, Partner



Brad Walovitch | Lead Consultant

brad.walovitch@us.forvismazars.com

Stephanie Saculles | Consultant

stephanie.saculles@us.forvismazars.com

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Agenda

1. Core Business Central Functionalities
2. Business Challenges Addressed With Business Central
3. Streamline Operations
4. Improve Financial Management
5. Improve Customer Satisfaction
6. Sneak Peek of Dynamics 365 Business Central 2024 Release Wave 2

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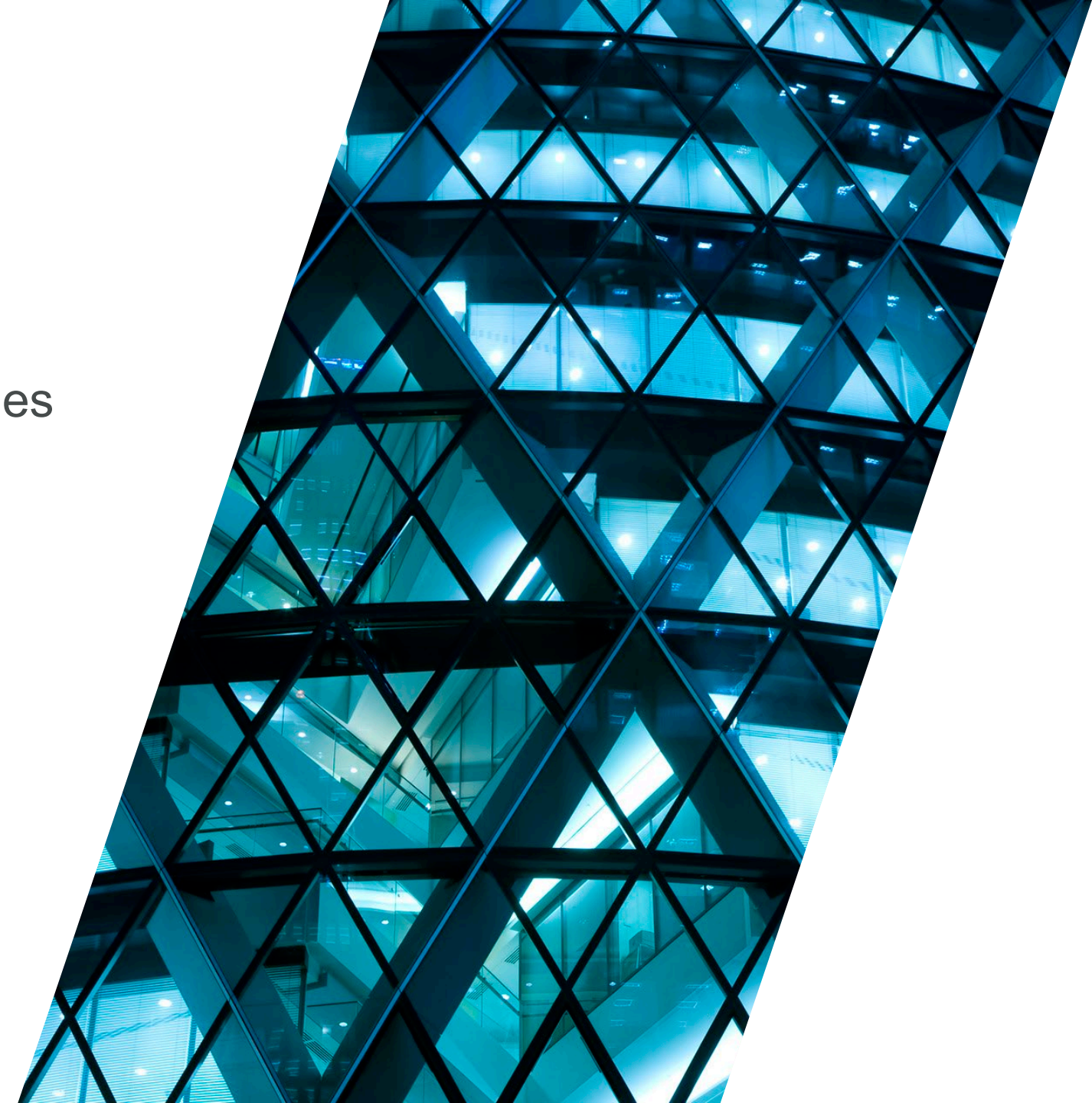
01

Core Business Central Functionalities



Core Business Central Functionality

Business Central Modules

Quote to Cash *(Business Central + Outlook)*	Enter a Purchase Order	Sales Invoices	Purchase Invoices
Email	Fixed Assets	Financial Reports	Workflow Approvals
Manage Your Inventory	Procure to Pay	Make to Stock	Produce Production Order
Order to Cash	Opportunity to Quote *(Business Central)*	Enter a Sales Order	Create a New Company
Quote to Cash *(D365 Sales + Business Central)*	Automate Accounts Payable	Customer Approval Process	Intercompany
Enter a Sales Order	Drop Ship Sales Order	Reconcile Bank Accounts	Consolidations

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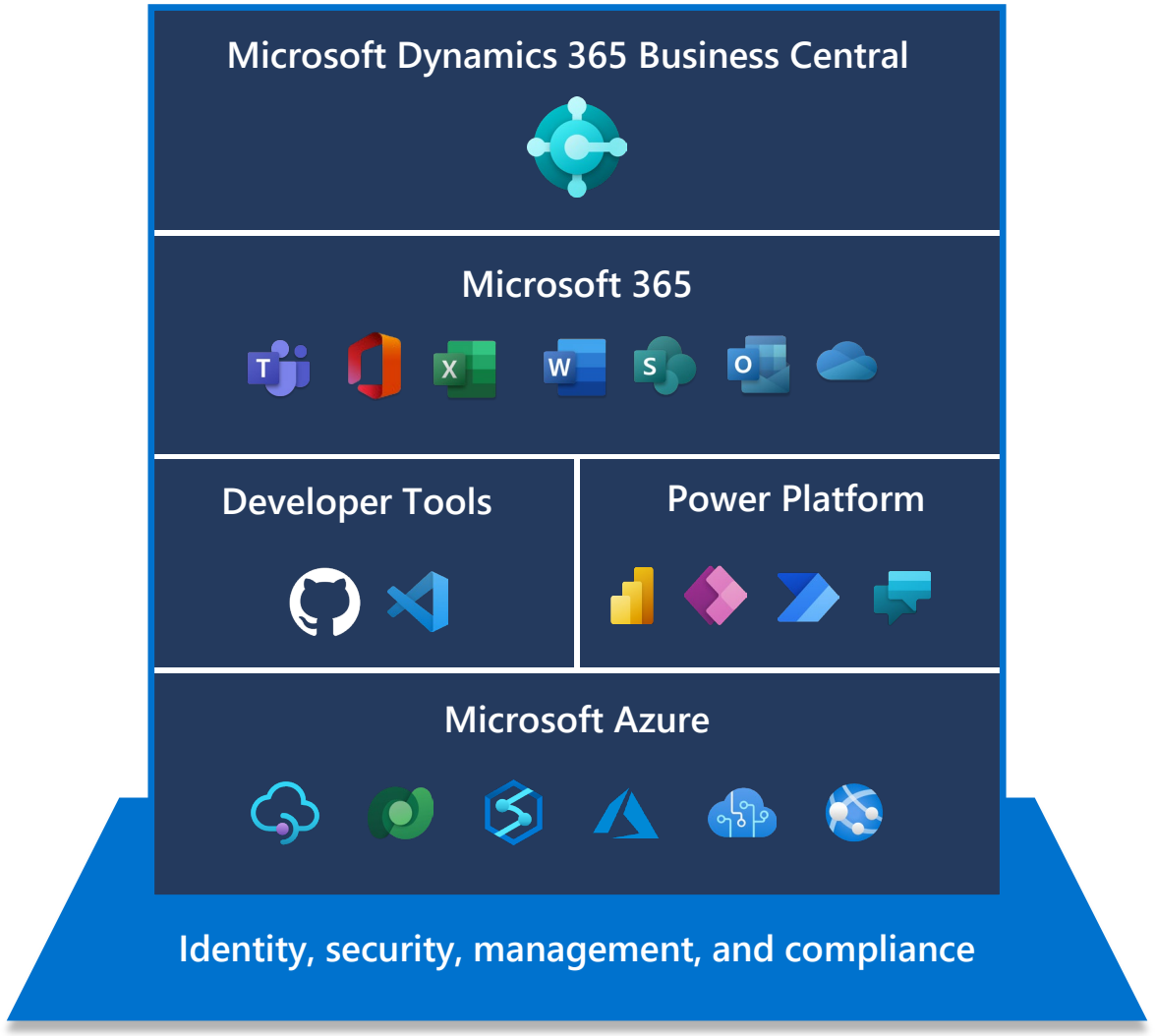
Core Business Central Functionality

Fully Integrated Stack

Dynamics 365 Business Central is the only **fully integrated stack**, on a **trusted & comprehensive cloud**



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Core Business Central Functionality

Reporting & Business Insights

Connect finance, sales, service, & operations teams with an inclusive business management solution trusted by over 30,000 small & midsize businesses.

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02

Business Challenges Addressed With Business Central

Business Challenges Addressed With Business Central

Benefits

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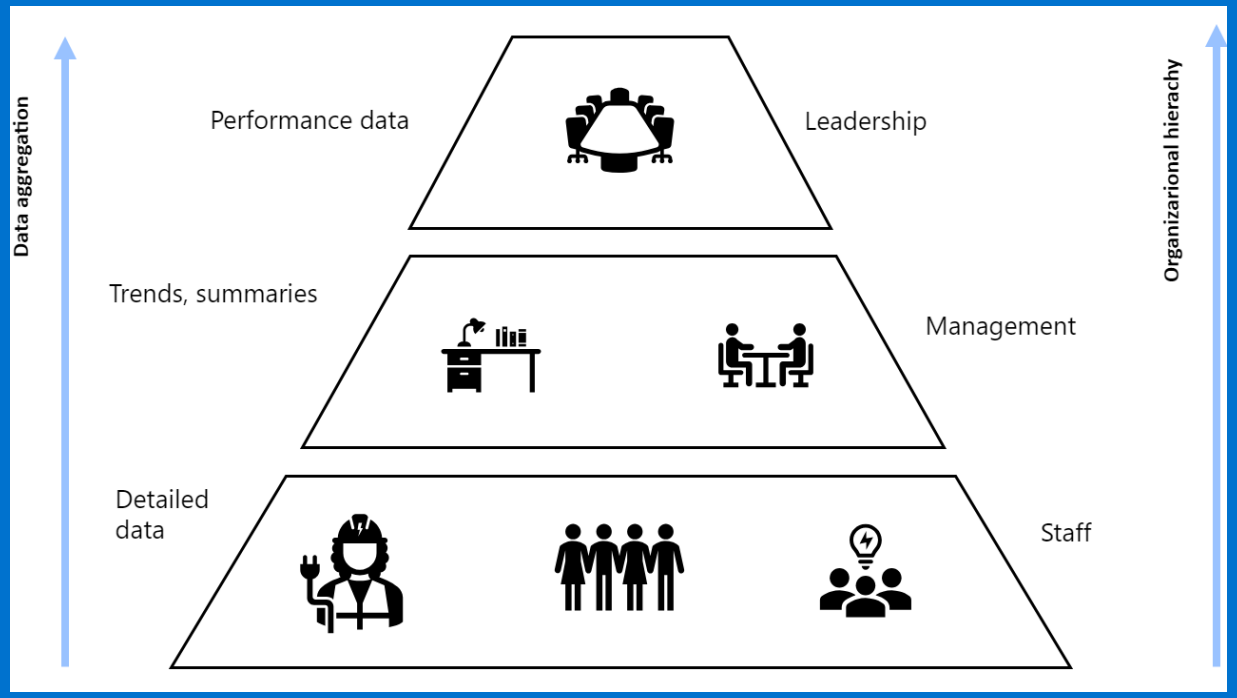
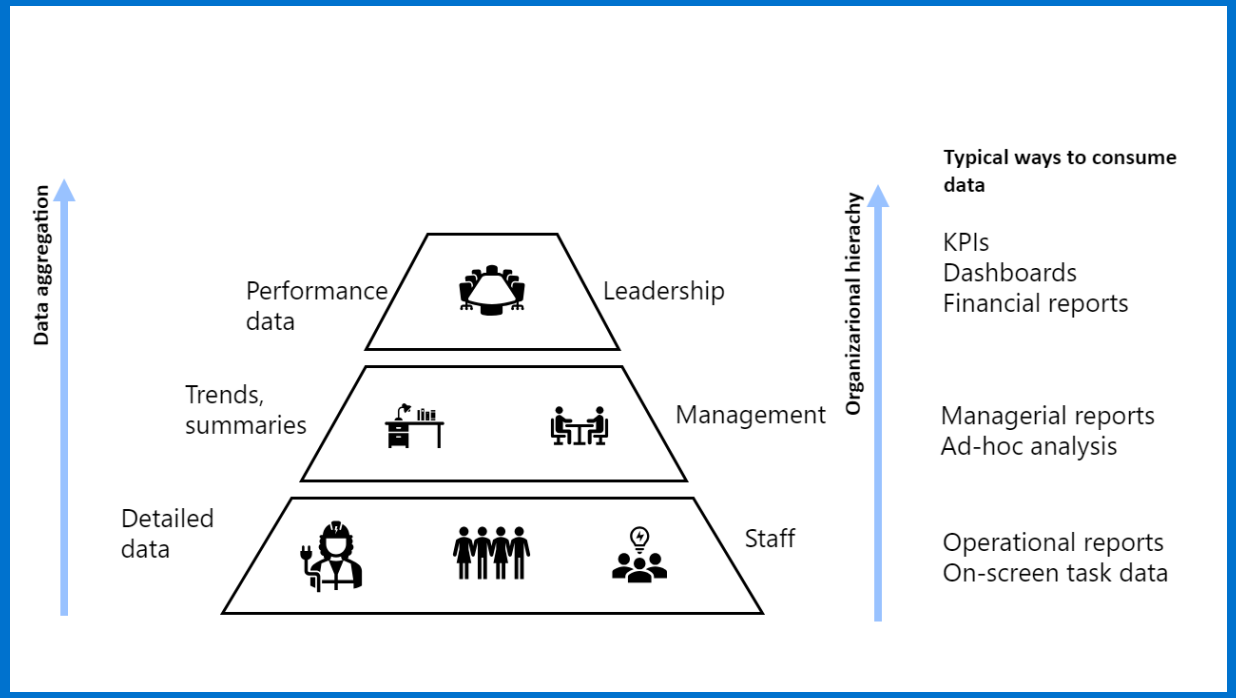
Business Challenges Addressed With Business Central

Review Business Health





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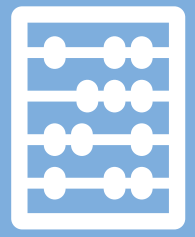
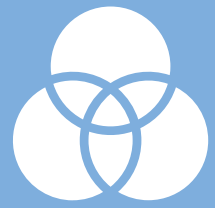
Business Challenges Addressed With Business Central

Identify Trends & Opportunities

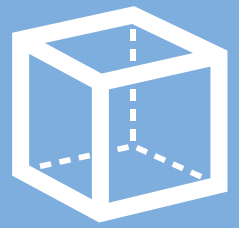
Financial Reports



Analyze Figures in GL Accounts



Compare Entries



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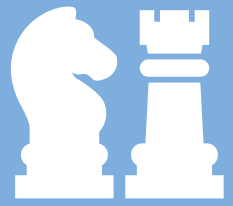

Strategic Decision Making

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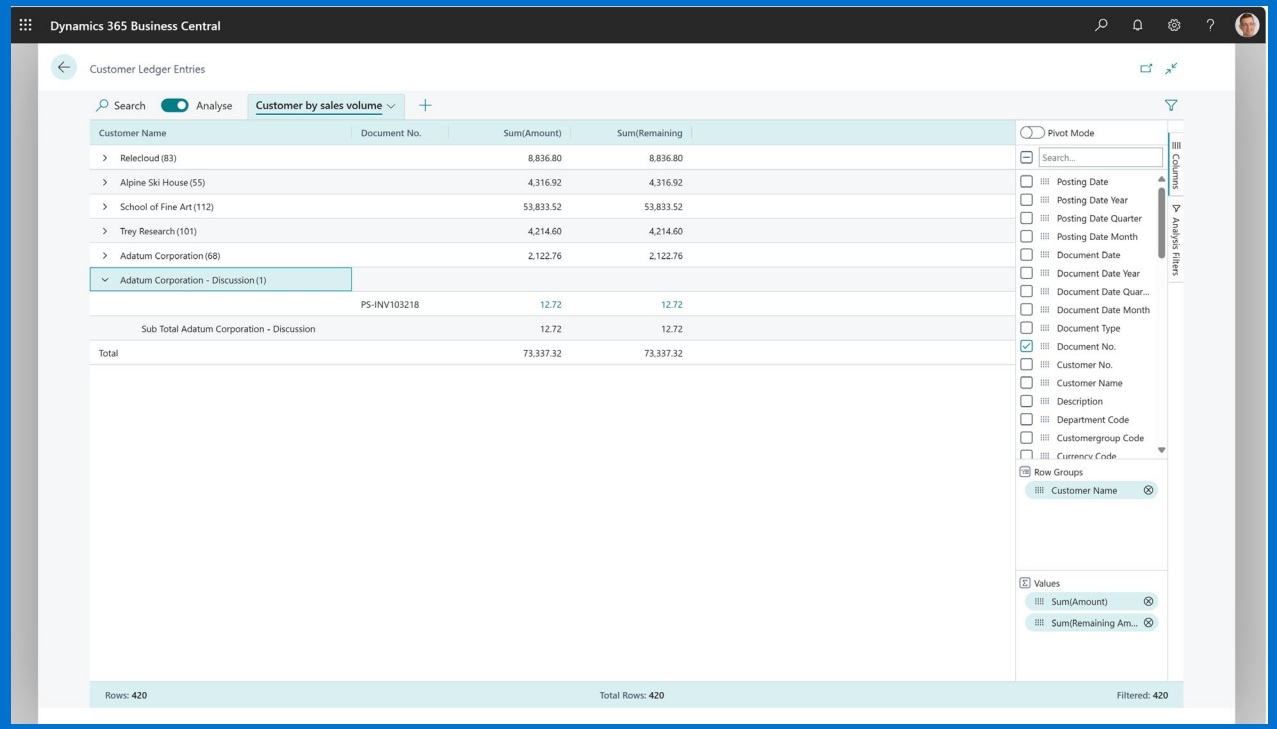
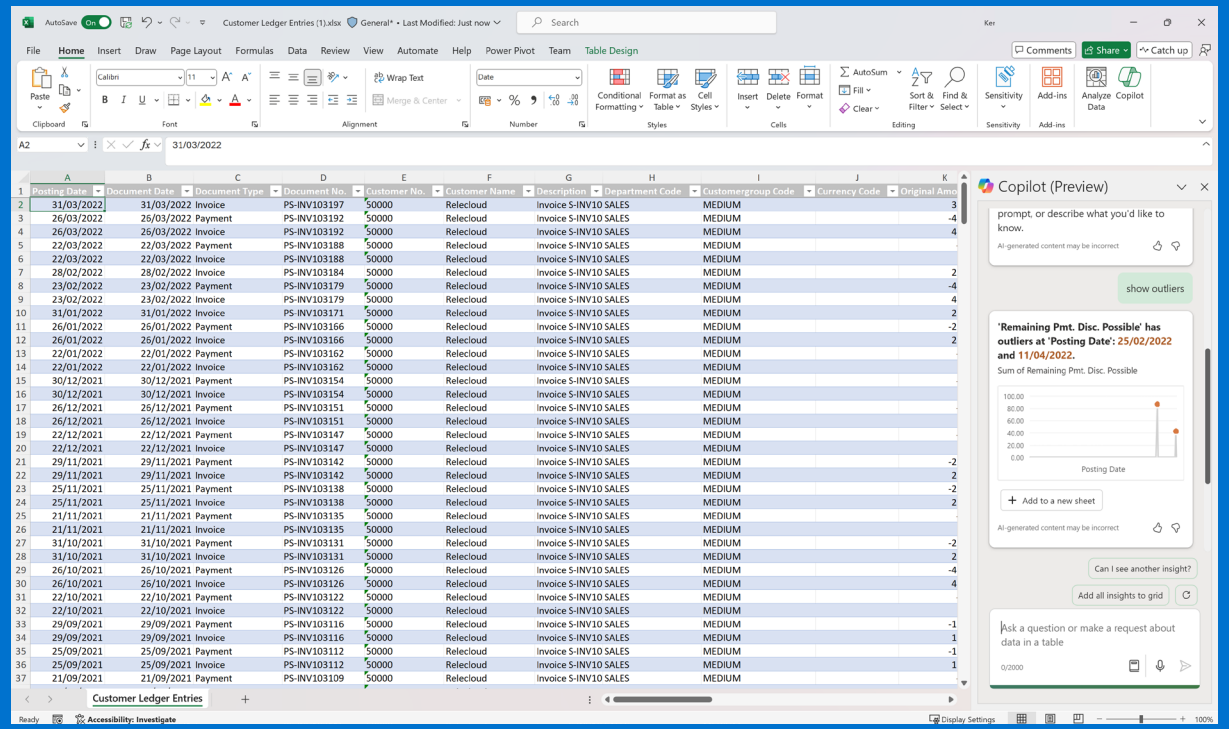
Business Challenges Addressed With Business Central

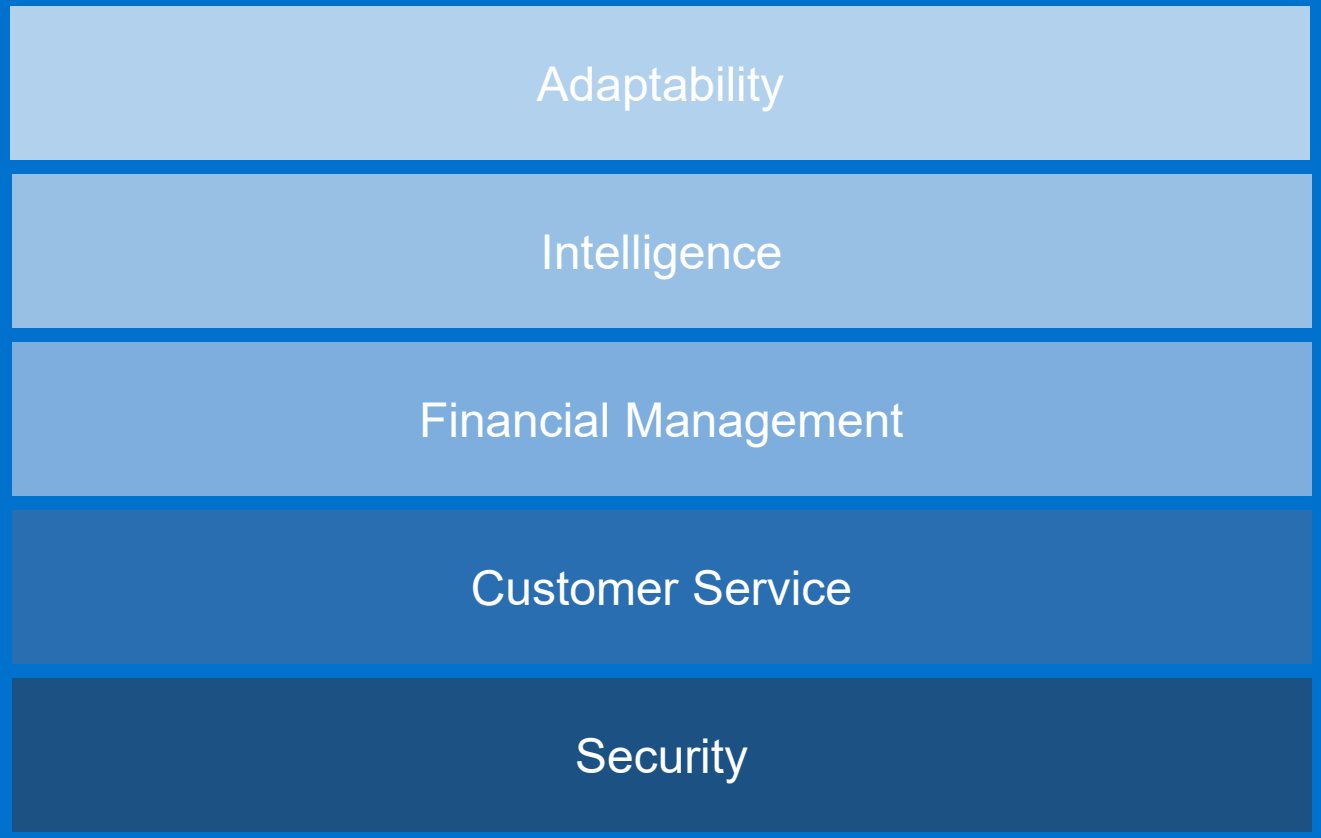
Review Customer History





Business Challenges Addressed With Business Central

Business Management



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03

Streamline Operations

Streamline Operations

Quote to Cash

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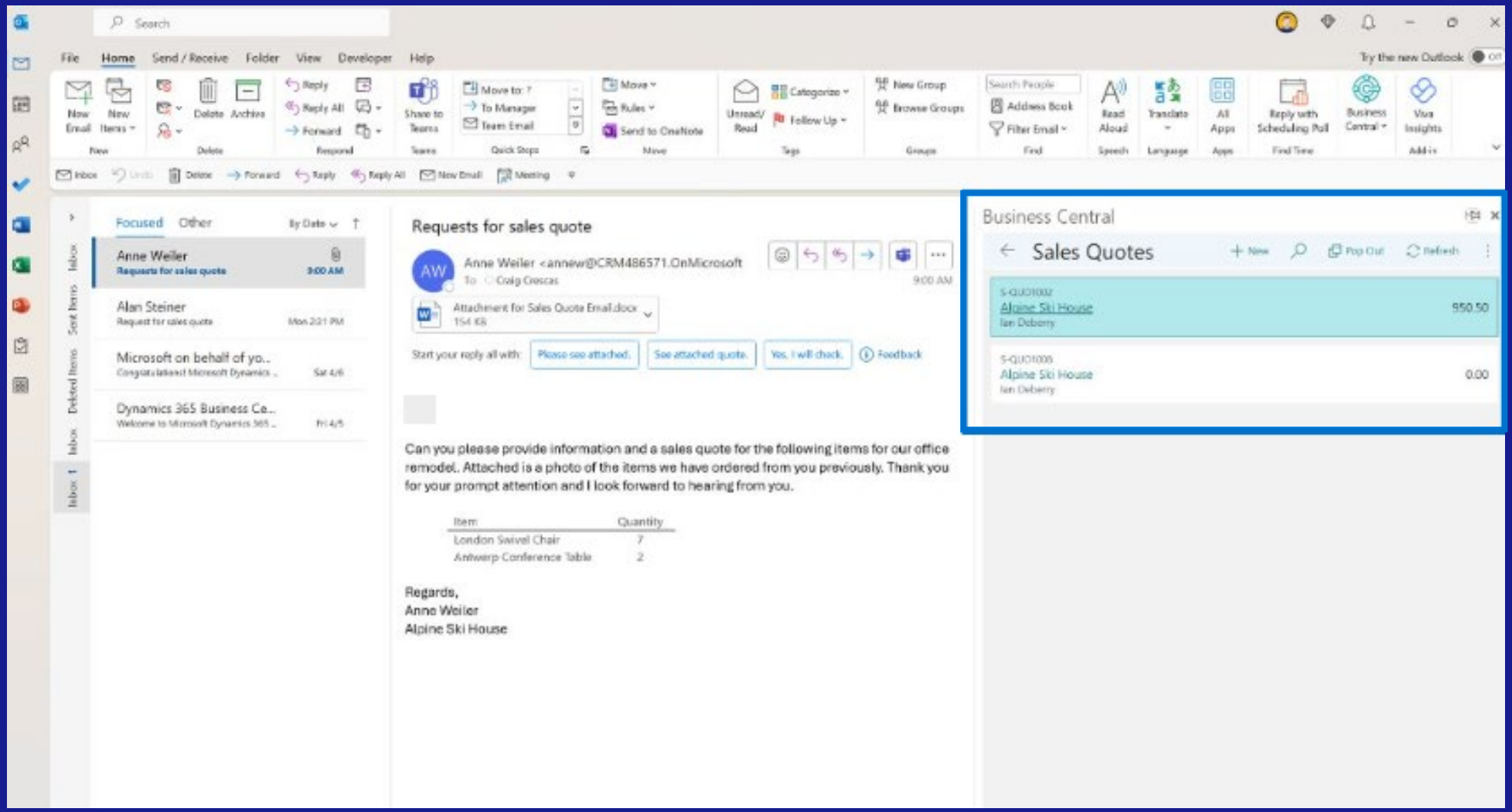
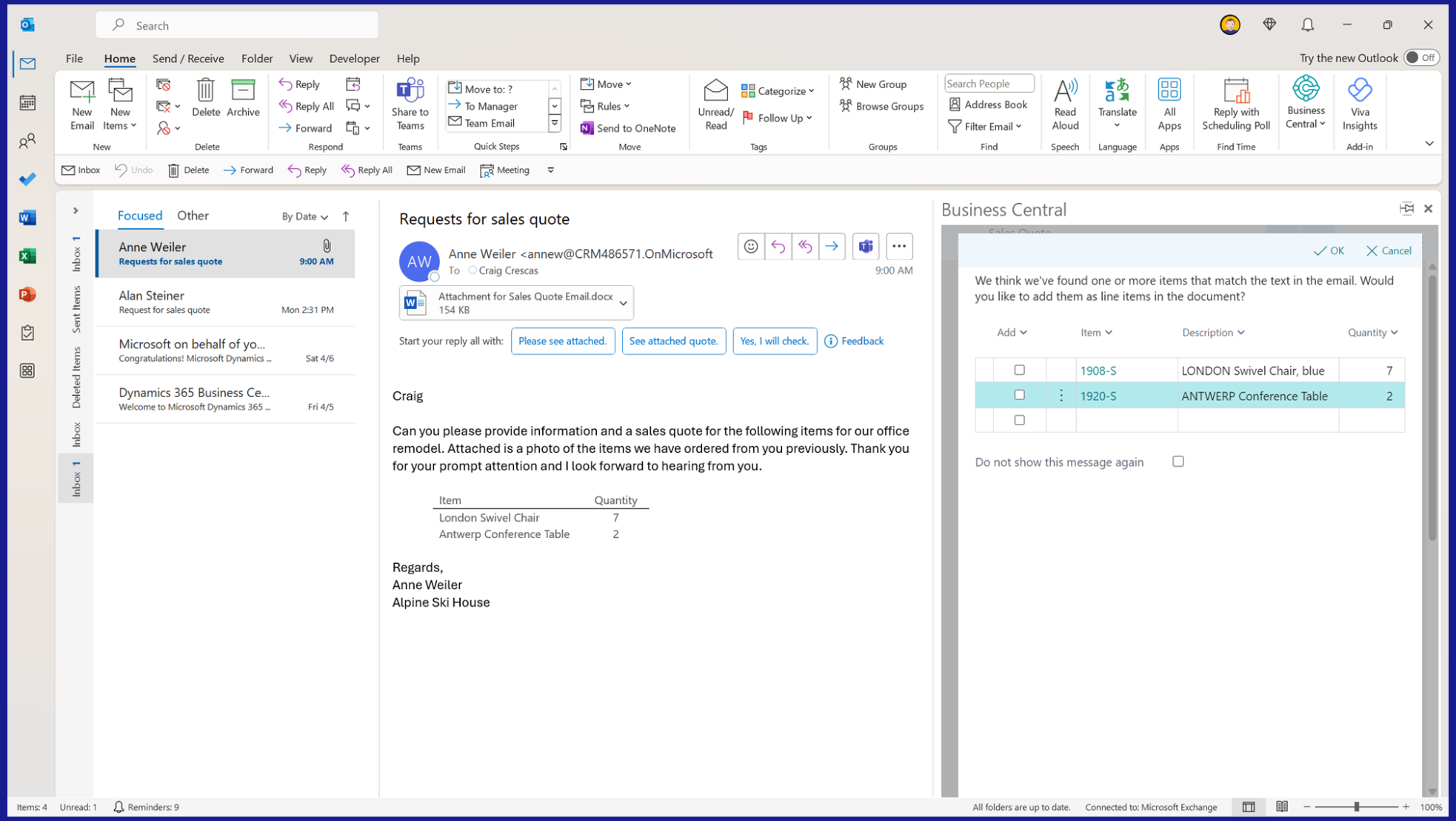
Streamline Operations

Quote to Cash



Streamline Operations

Quote to Cash



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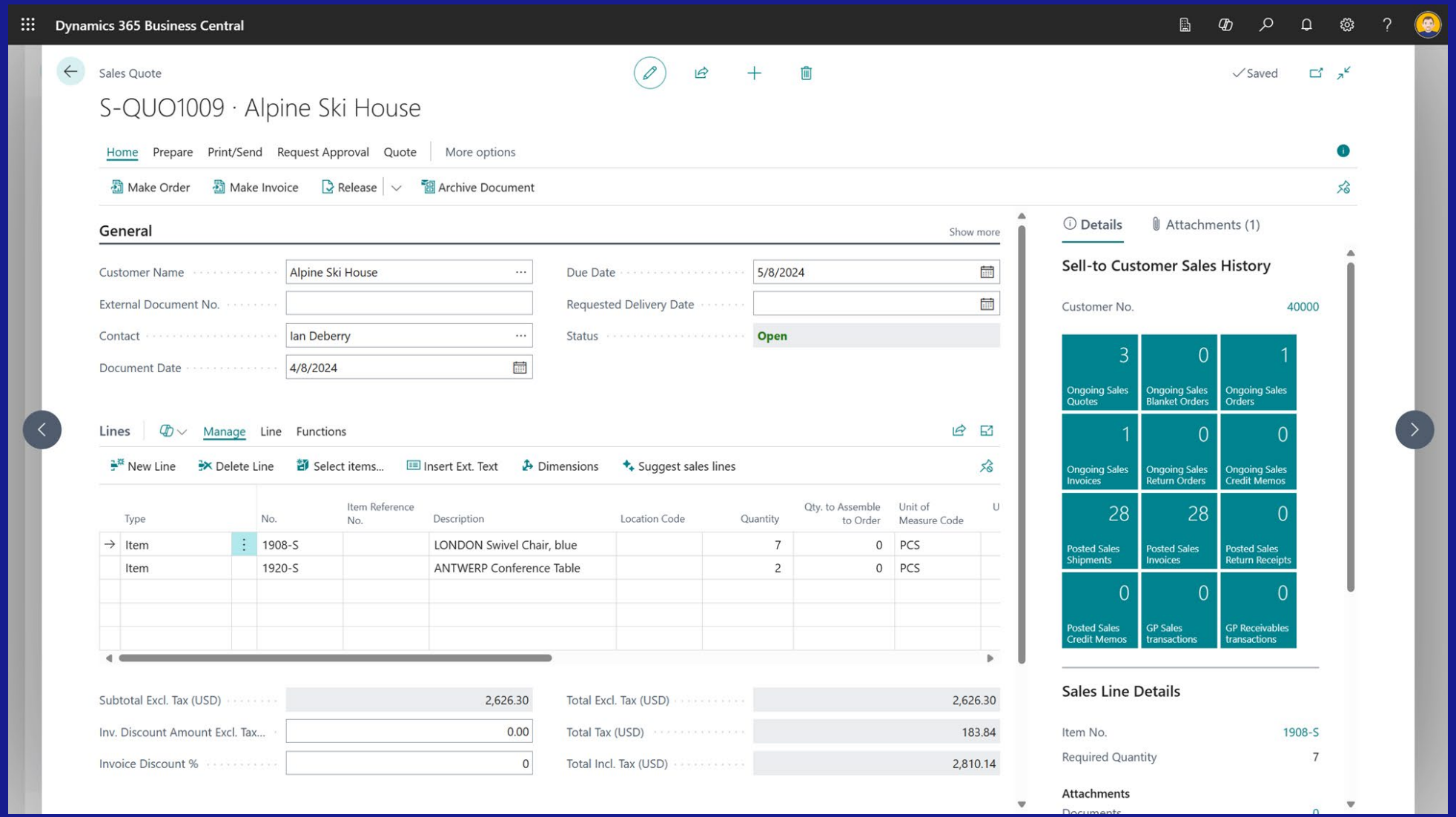
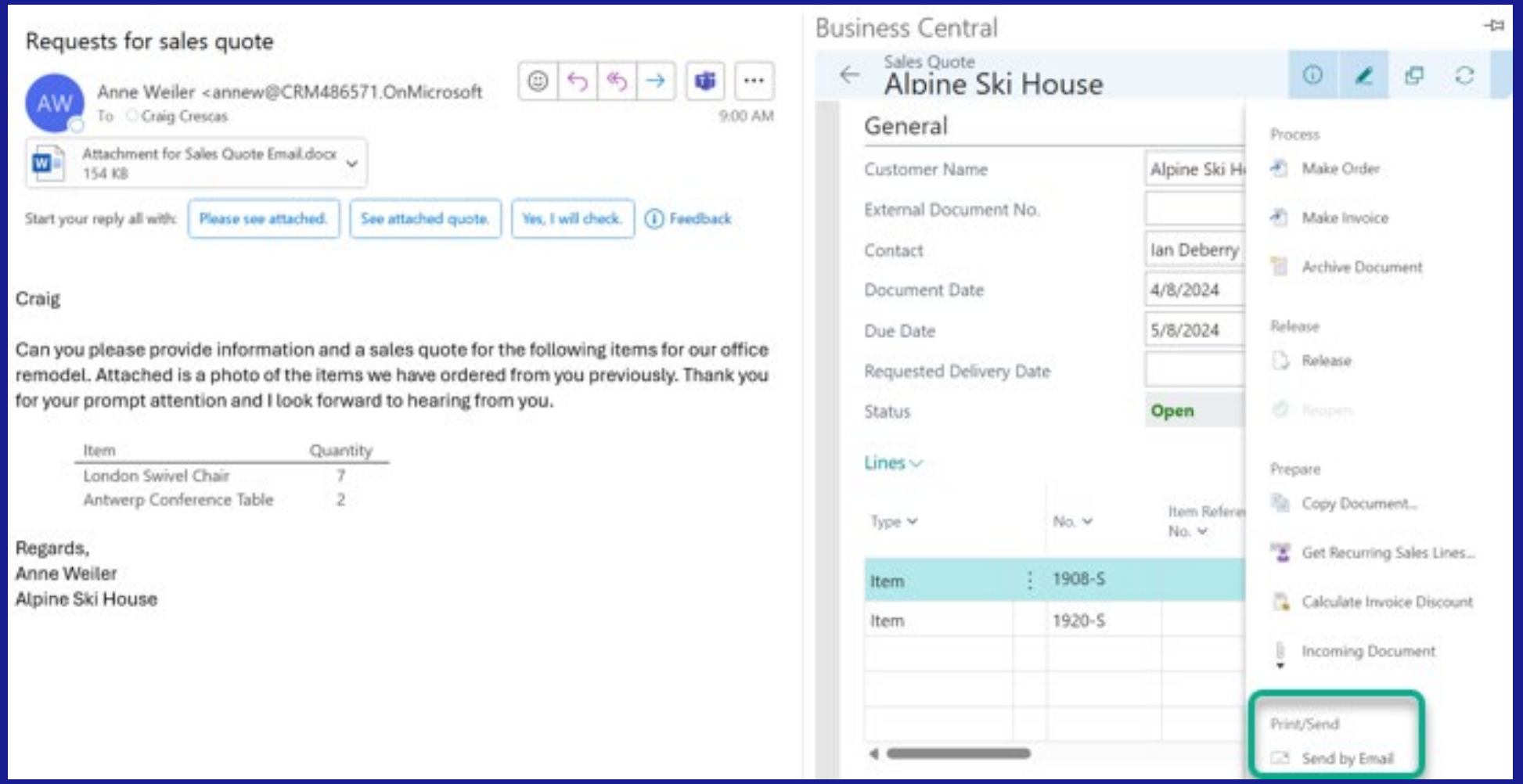
Streamline Operations

Quote to Cash



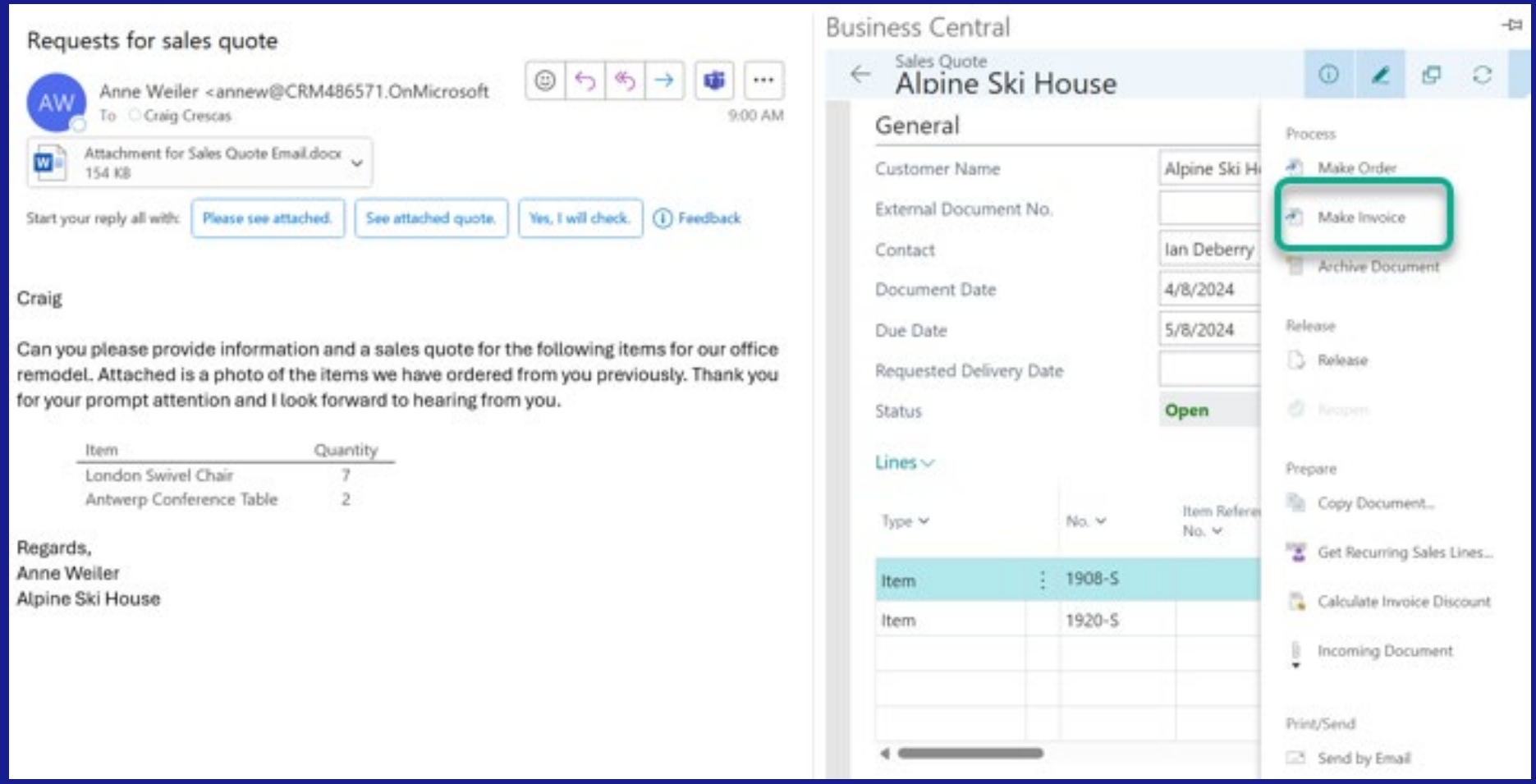
Streamline Operations

Quote to Cash



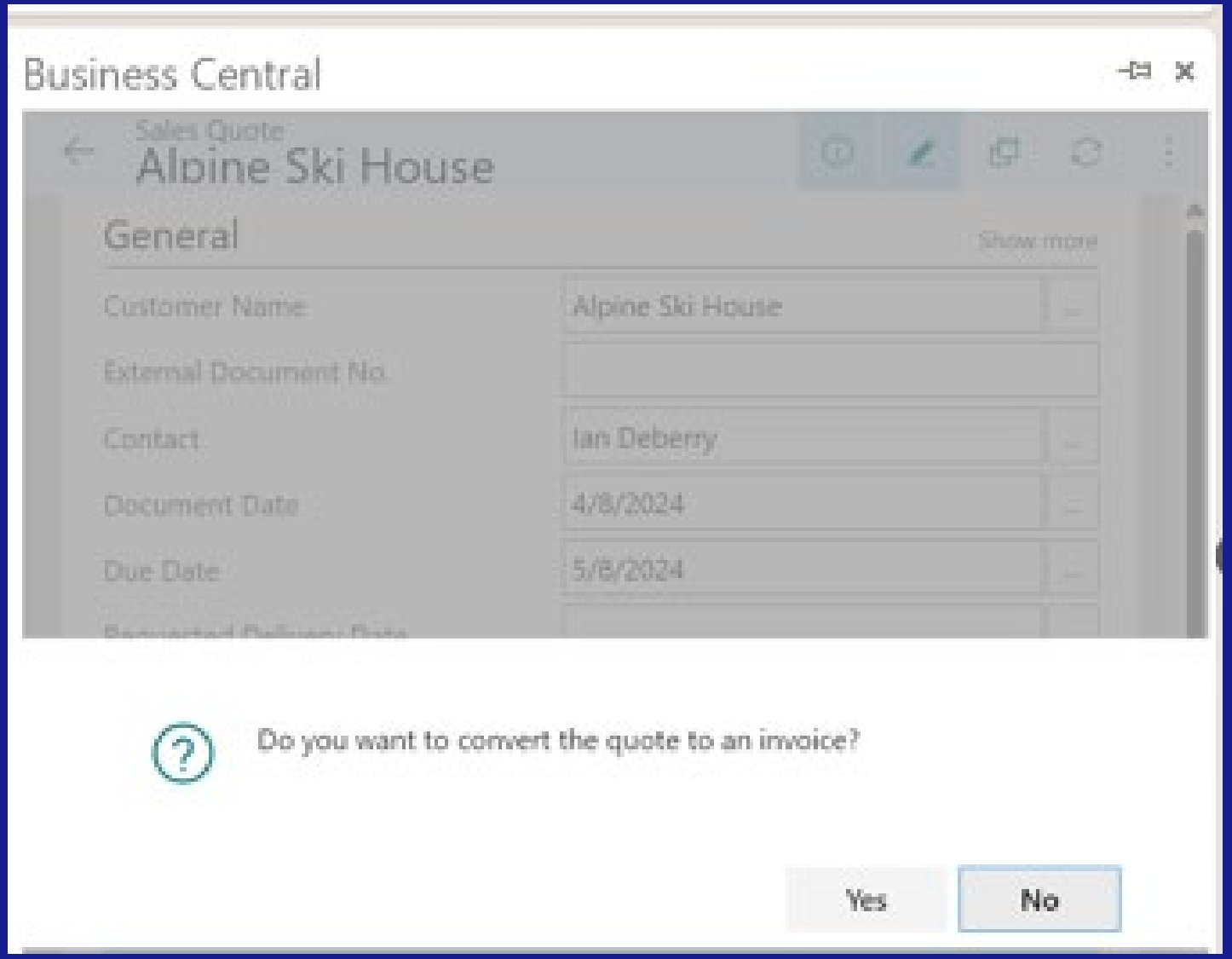
Streamline Operations

Quote to Cash



Streamline Operations

Quote to Cash



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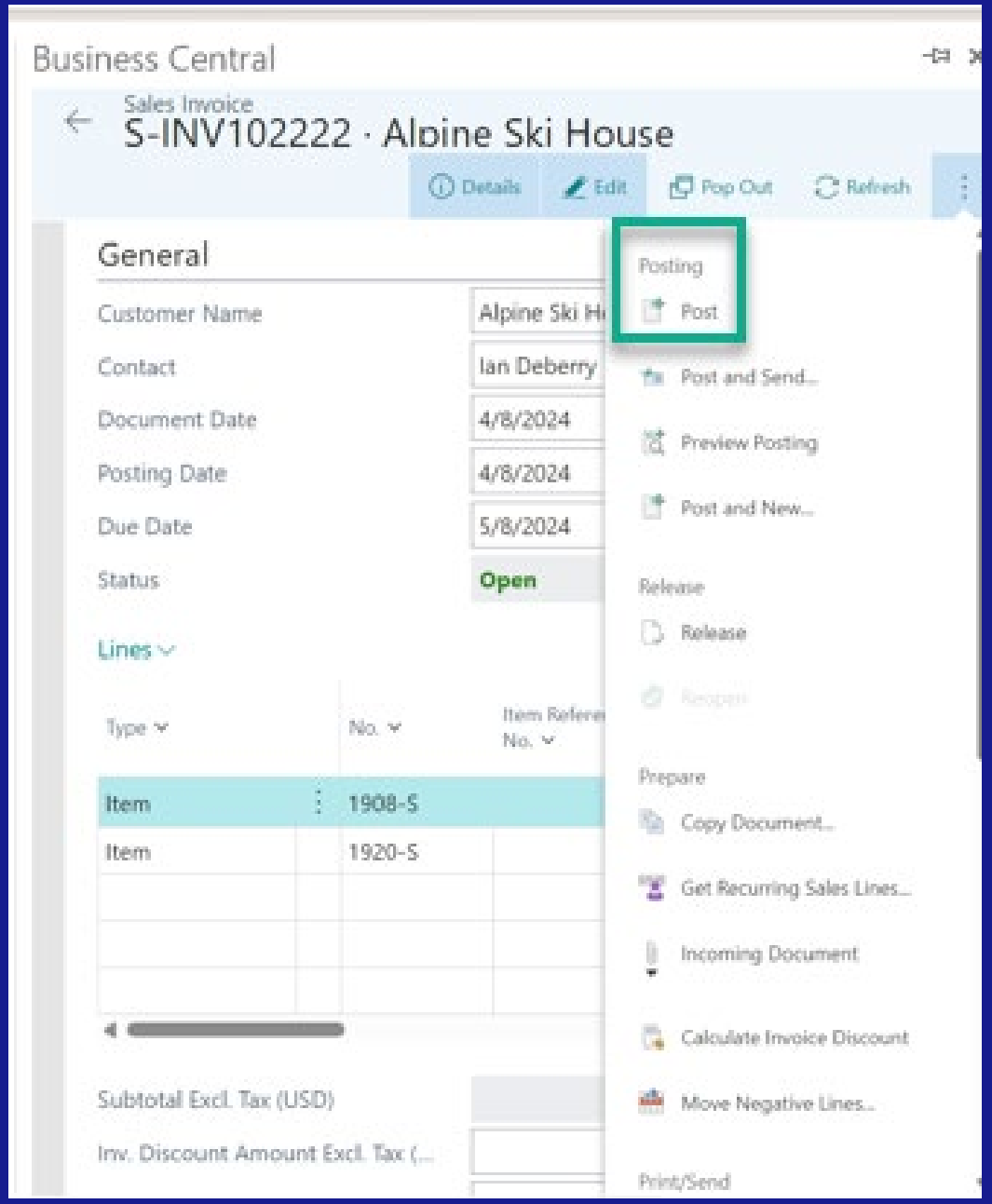
Streamline Operations

Quote to Cash



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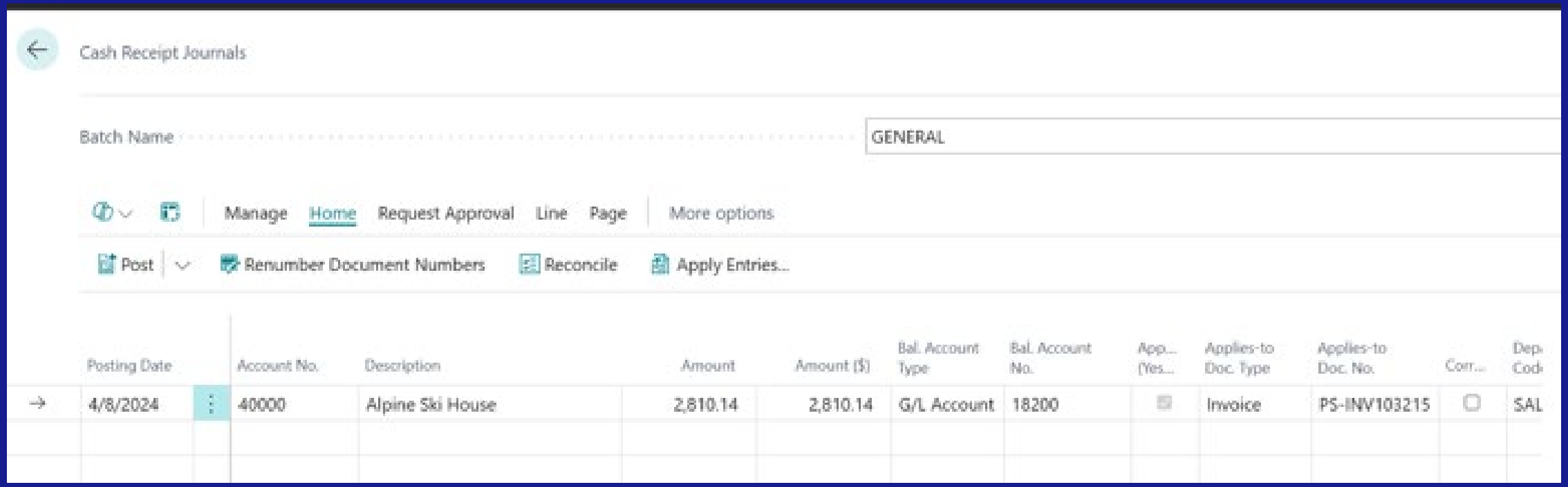
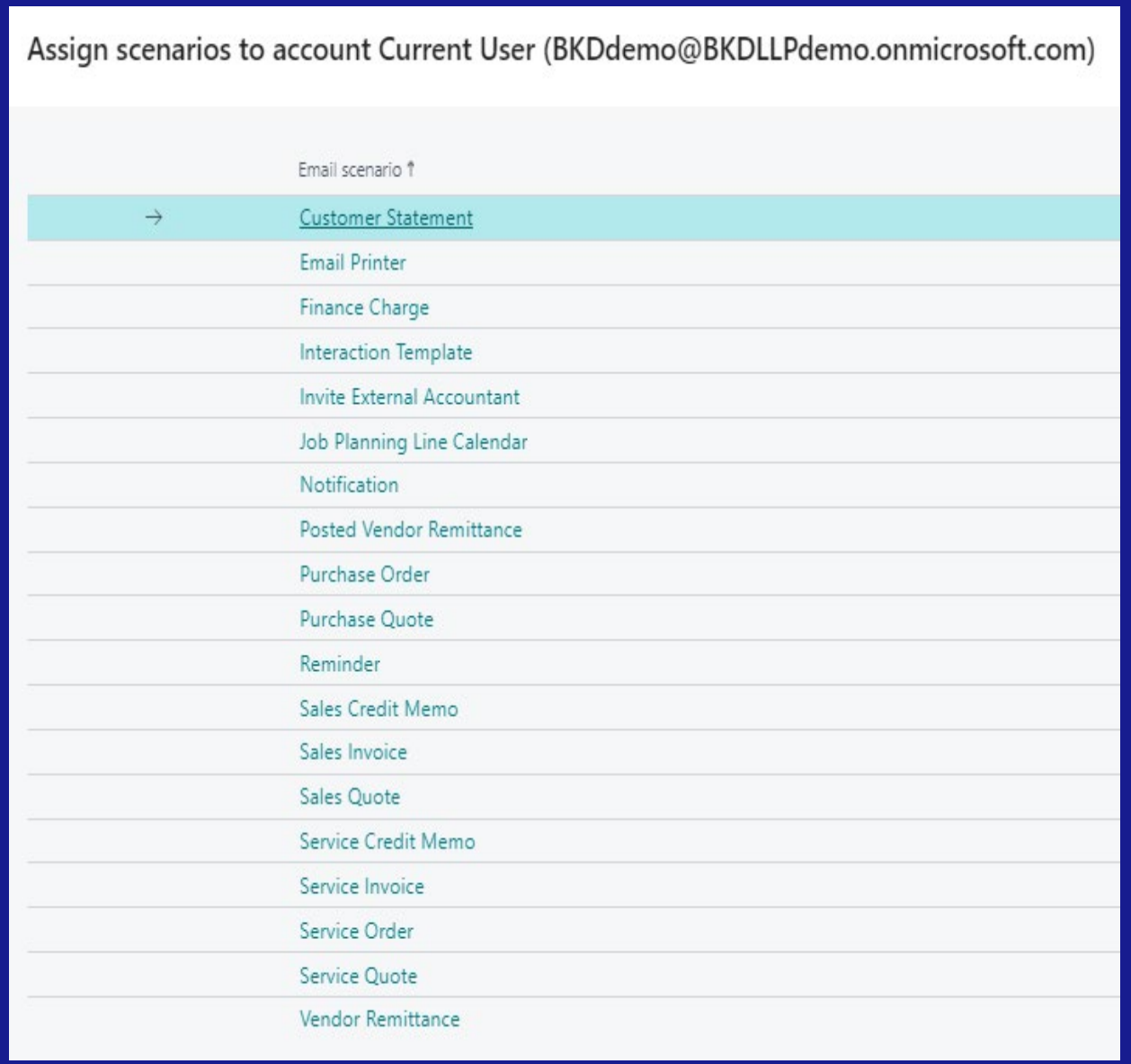
Streamline Operations

Quote to Cash



Streamline Operations

Email



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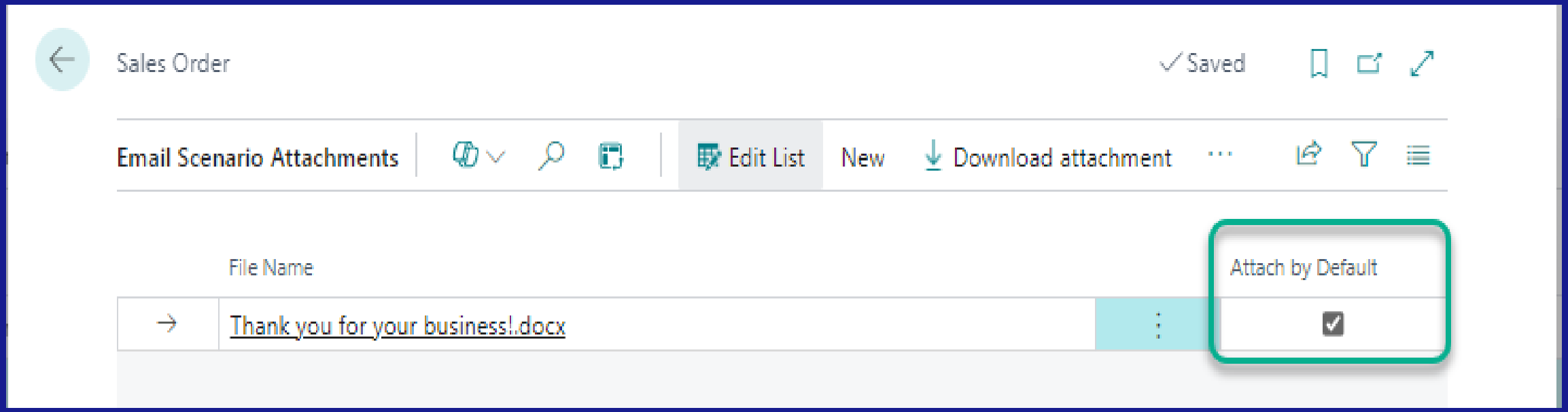
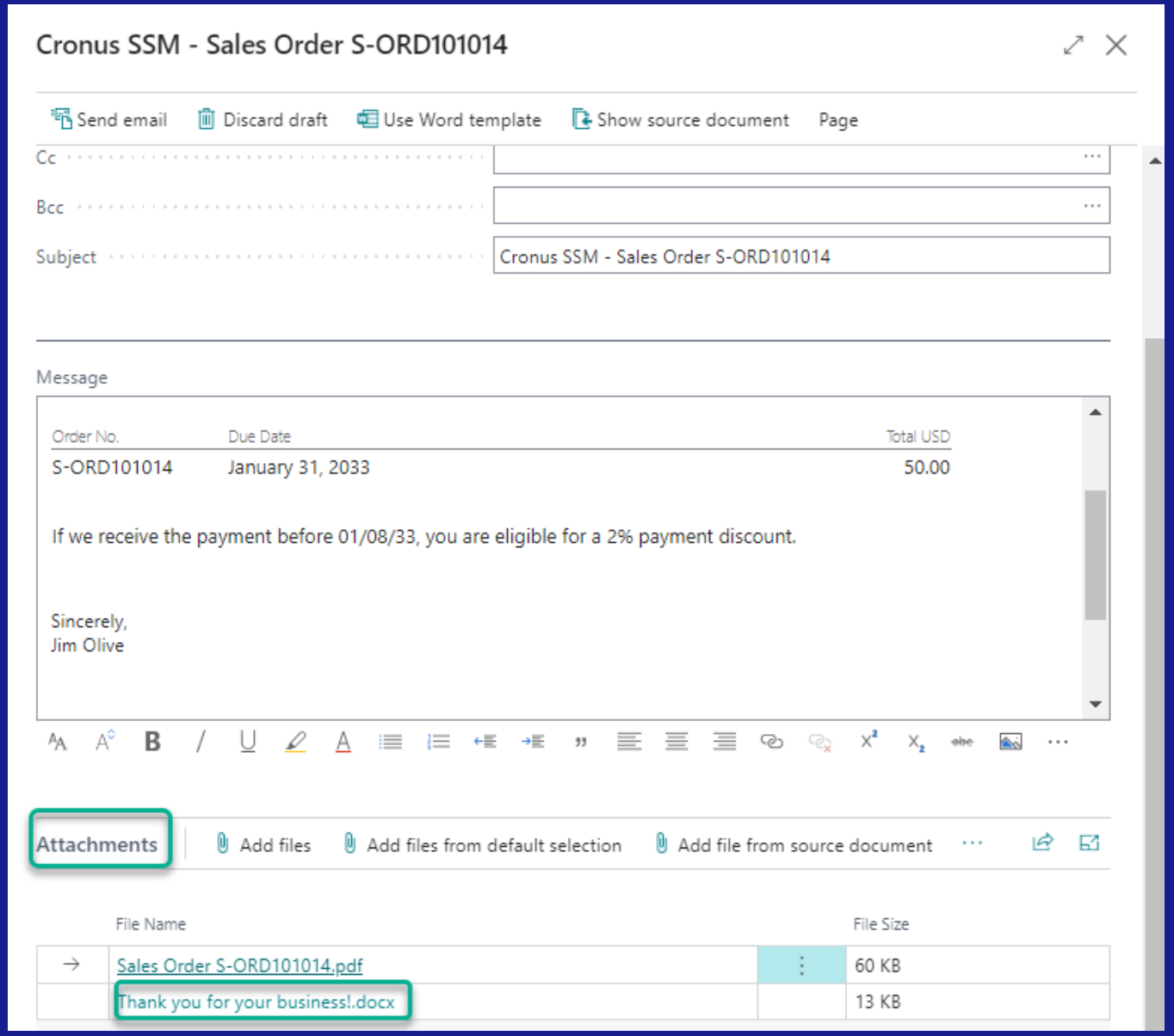
Streamline Operations

Email



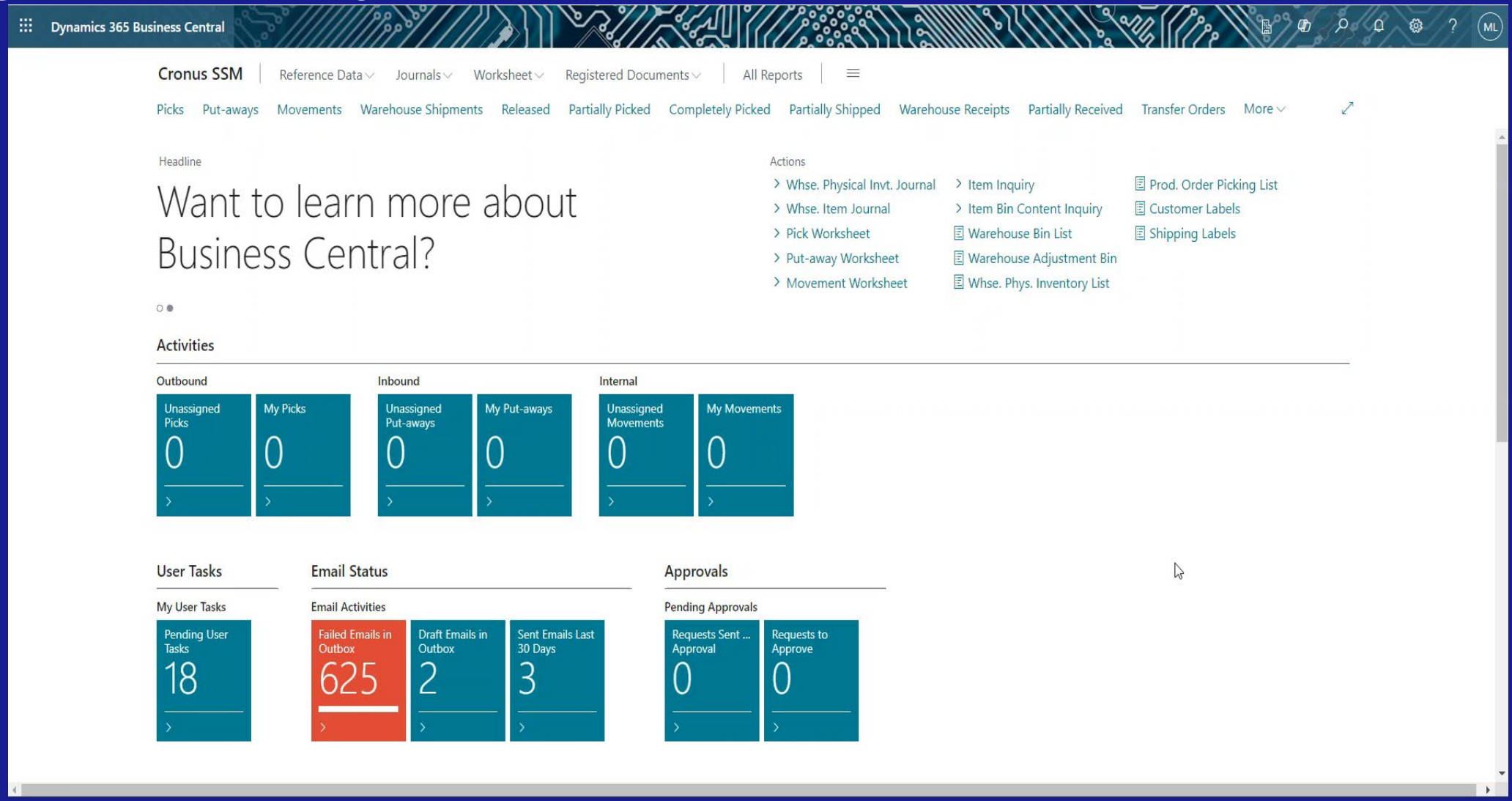
Streamline Operations

Email



Streamline Operations

Manage Your Inventory



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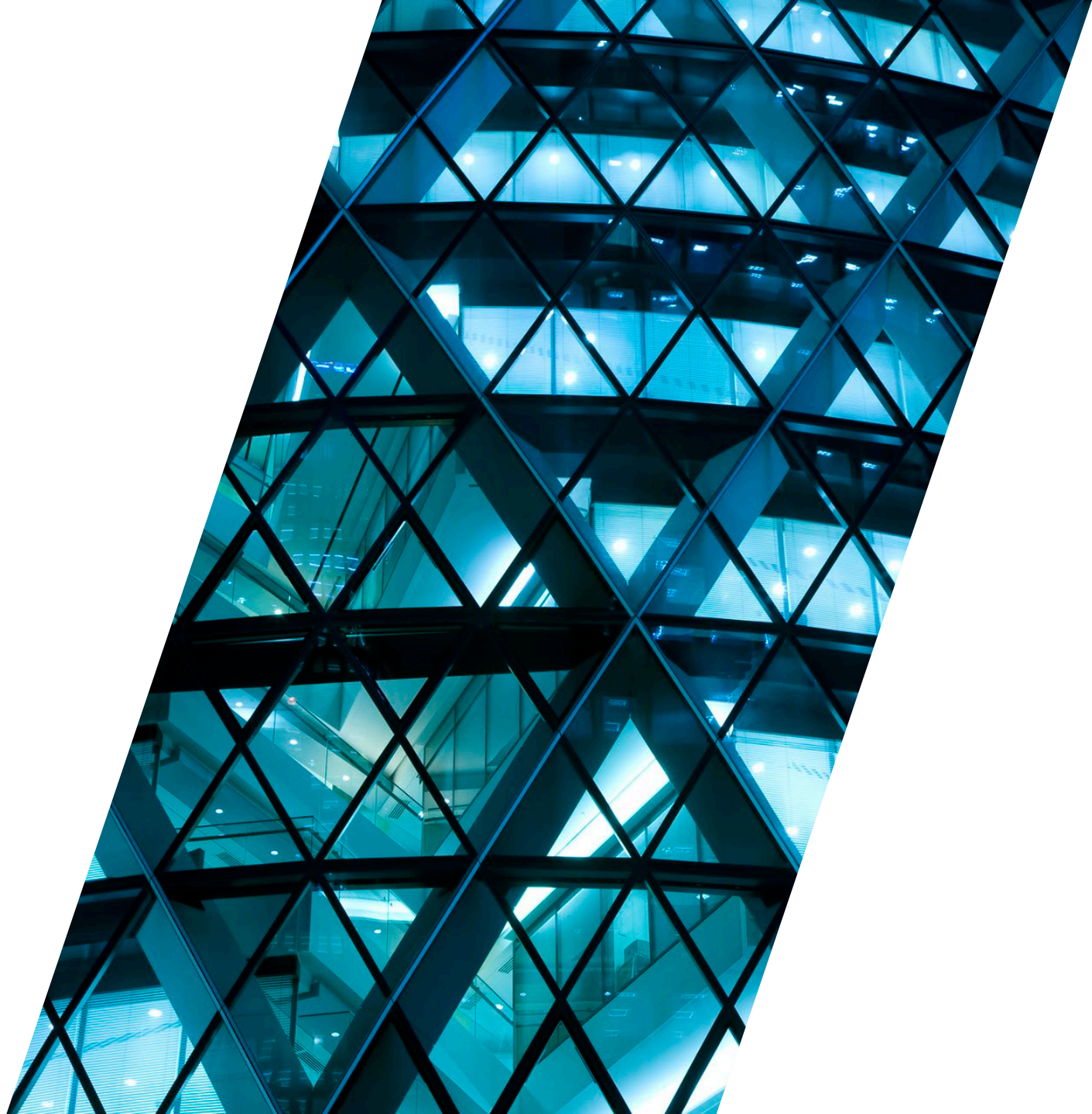
04

Improve Financial Management



Improve Financial Management
Benefits

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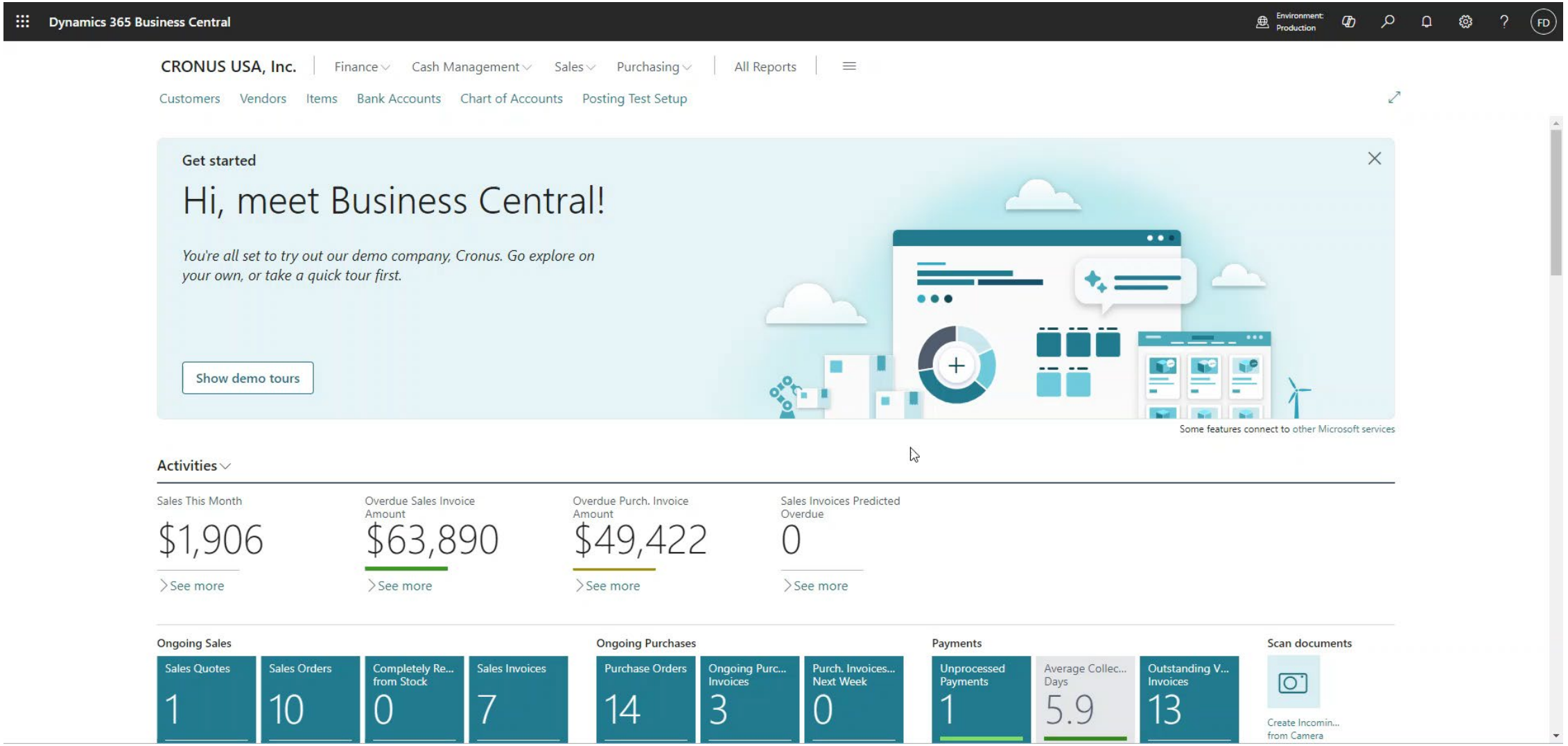
Improve Financial Management

Quick Access to Financials



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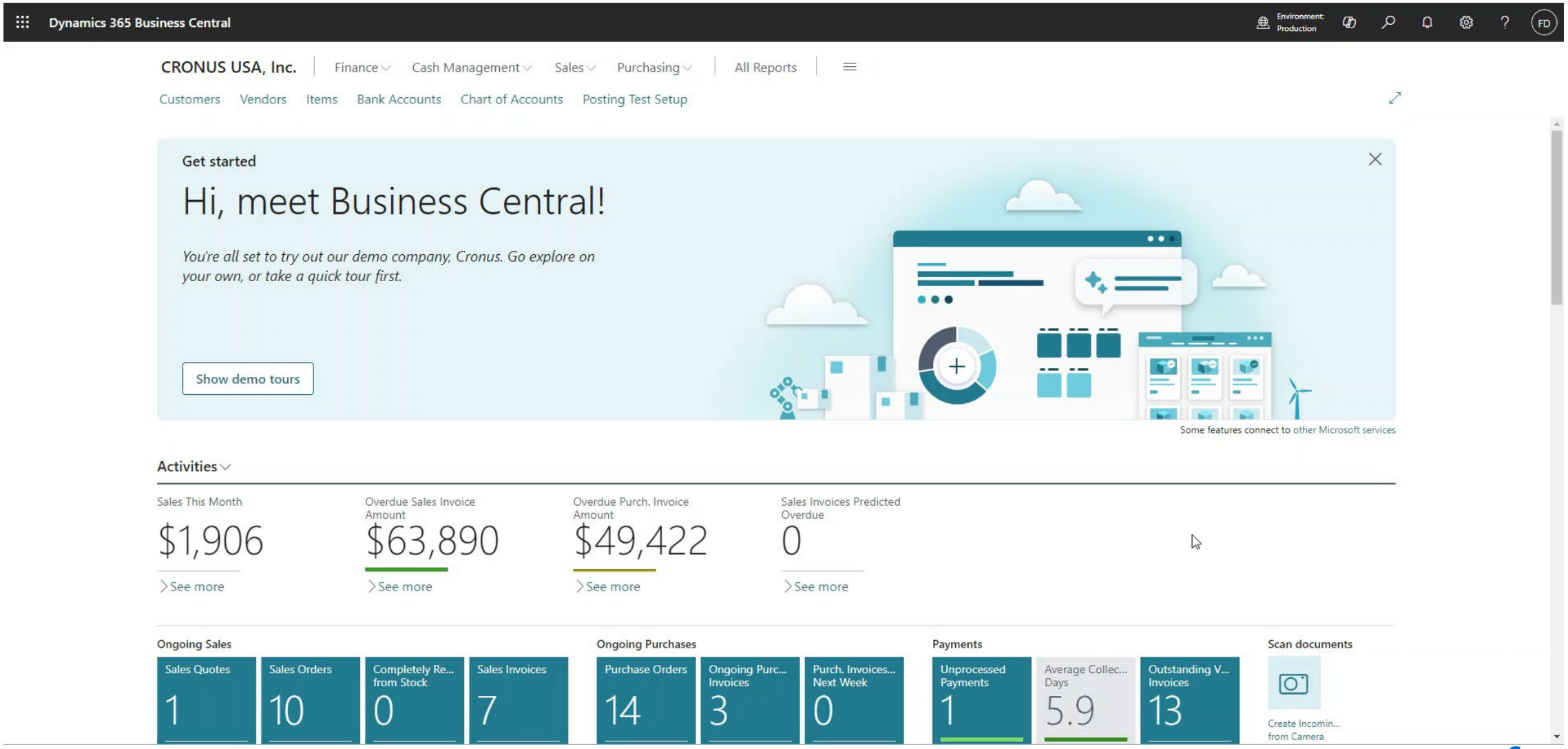
Improve Financial Management

Add a New Account to GL



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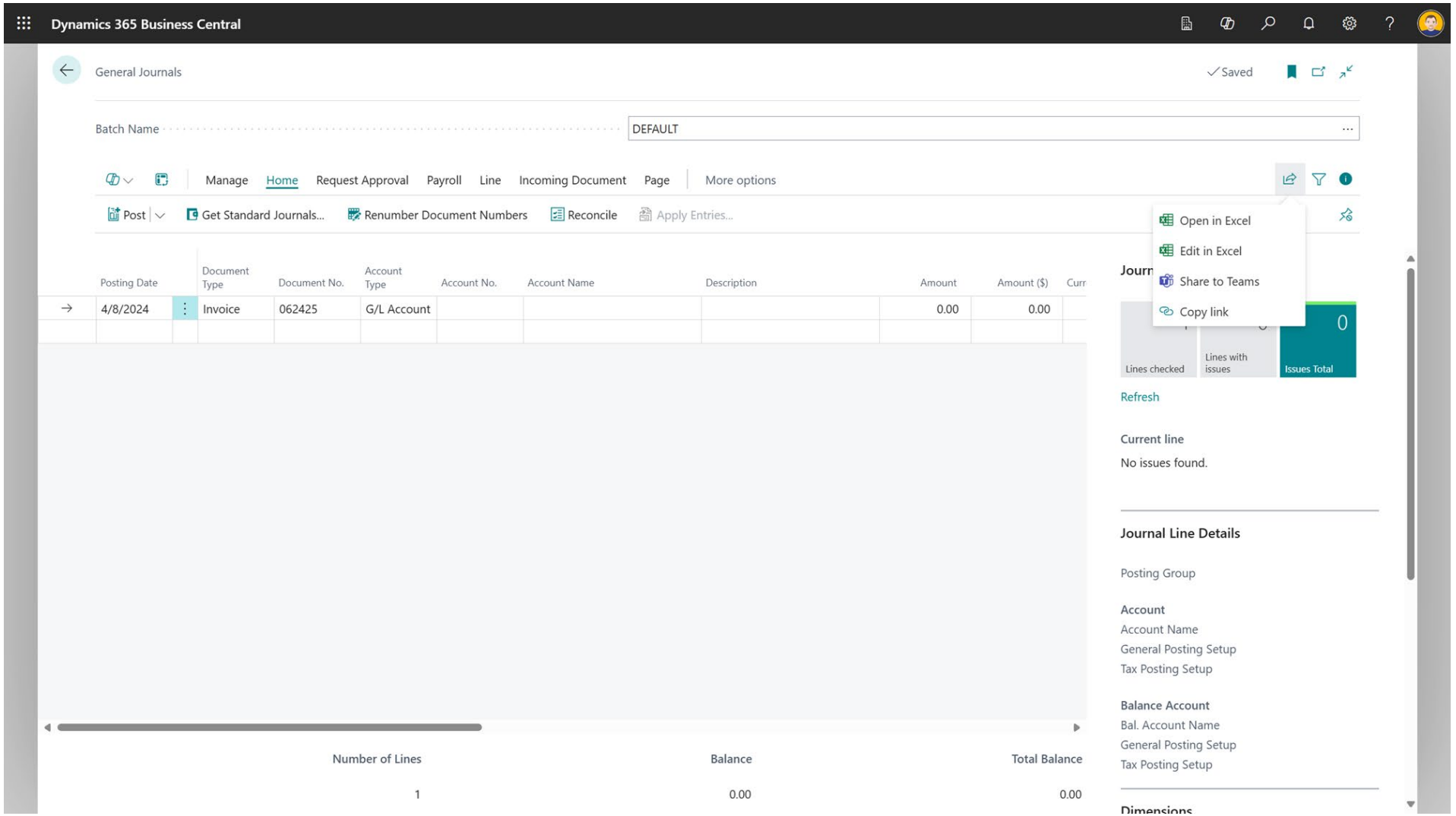
Improve Financial Management
Enter a Journal Expense (via Excel Import)



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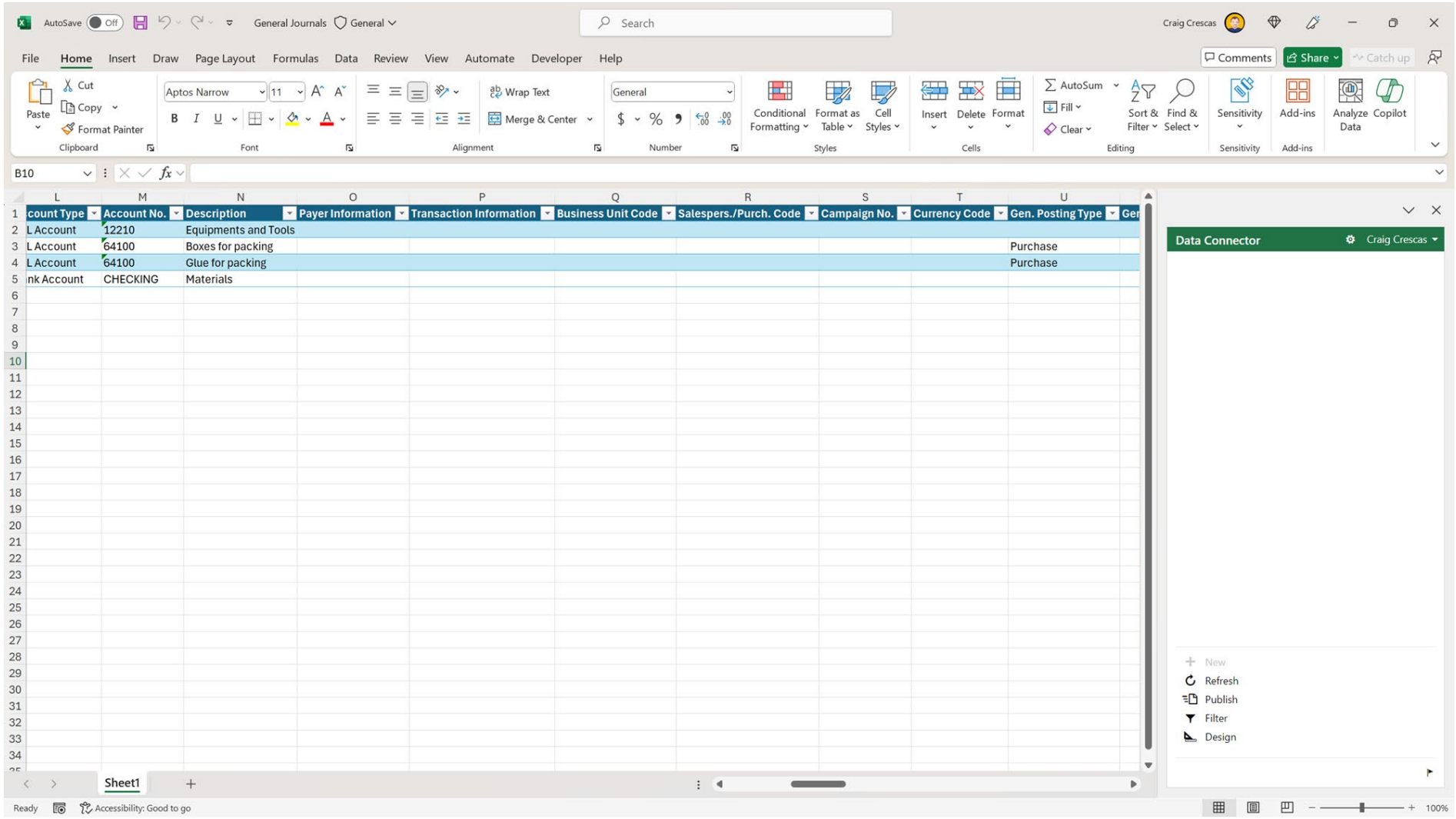
Improve Financial Management

Enter a Journal Expense (via Excel Import)



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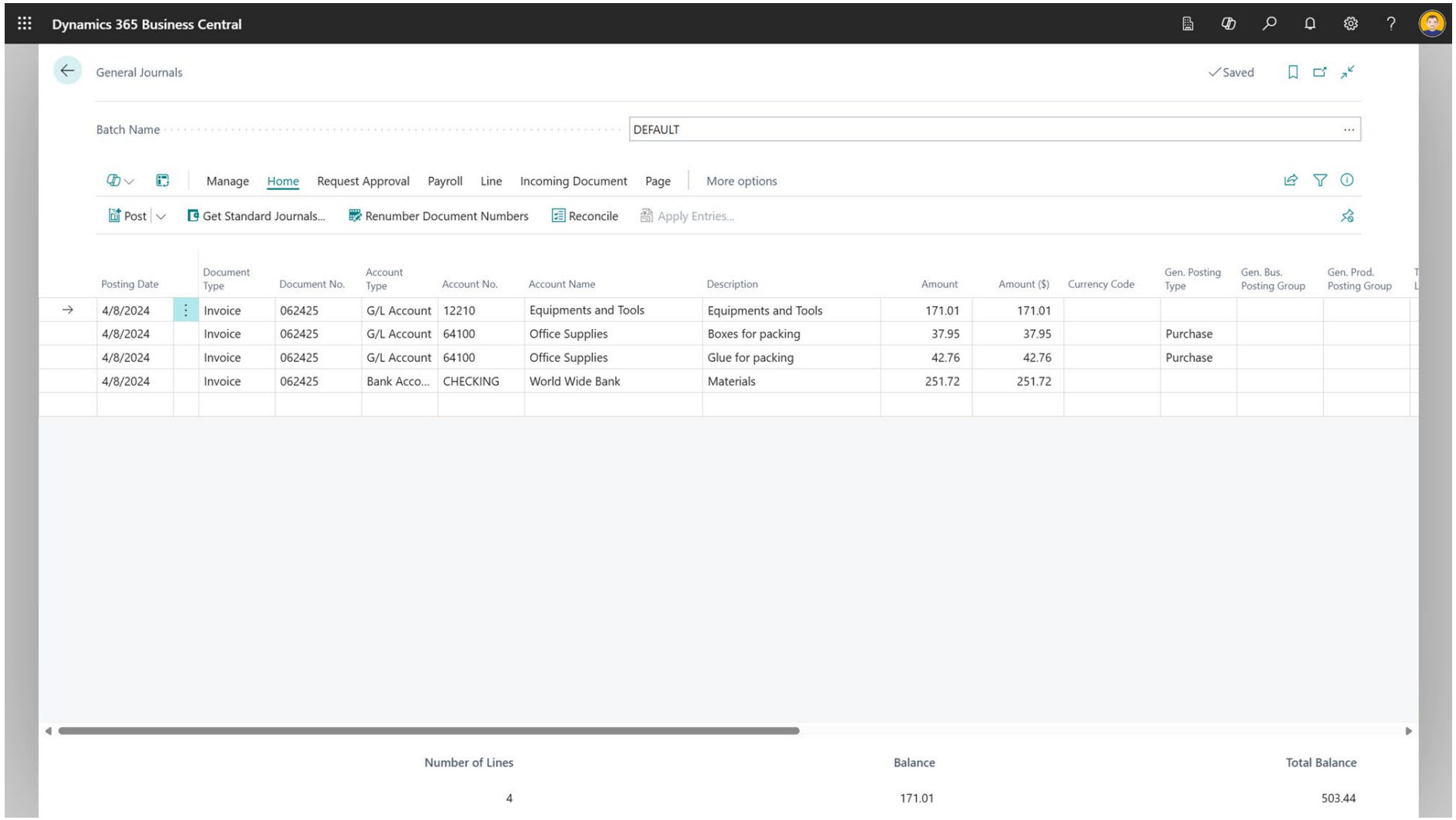
Improve Financial Management
Enter a Journal Expense (via Excel Import)



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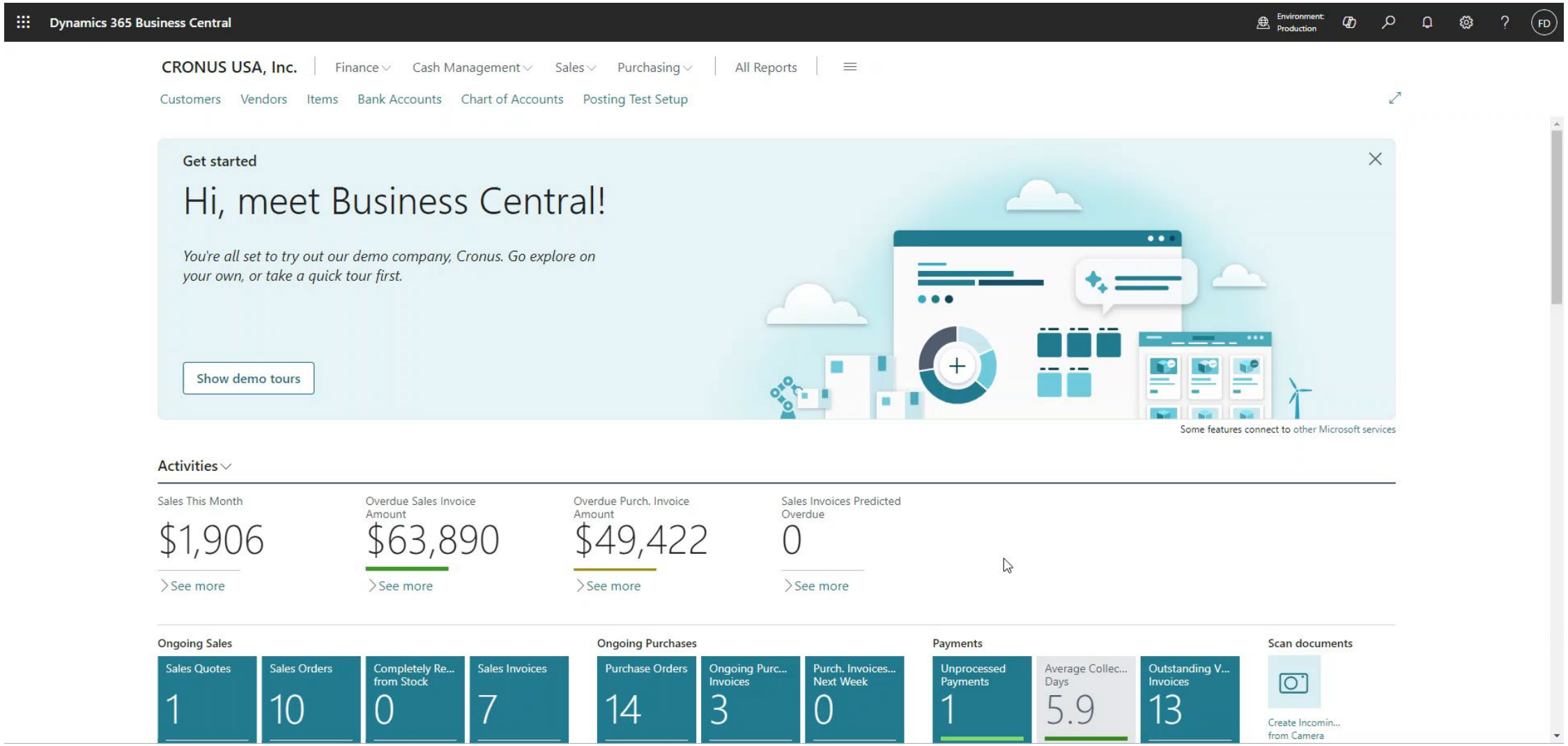
Improve Financial Management
Analysis With Copilot



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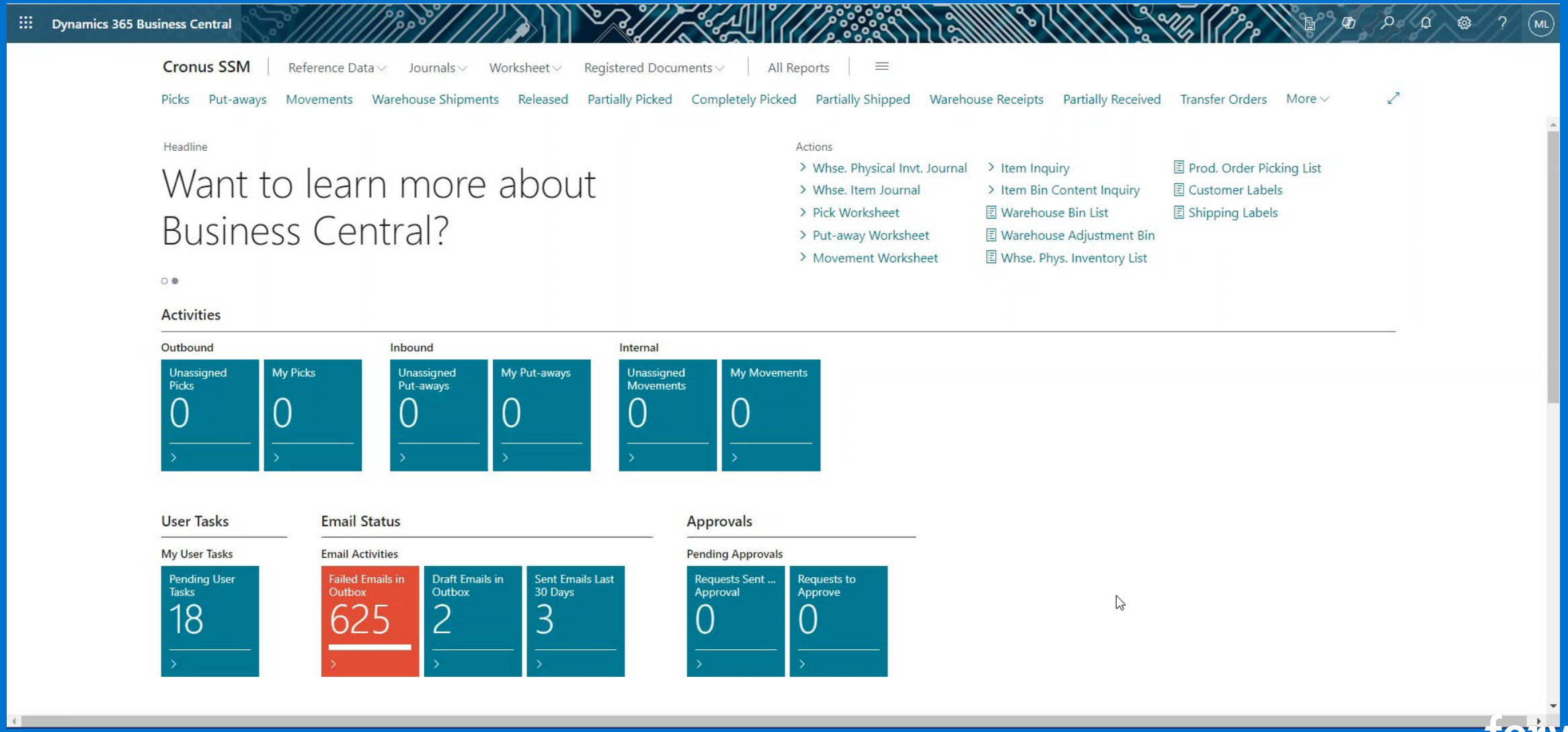
05

Improve Customer Satisfaction

Improve Customer Satisfaction

Analysis With Copilot

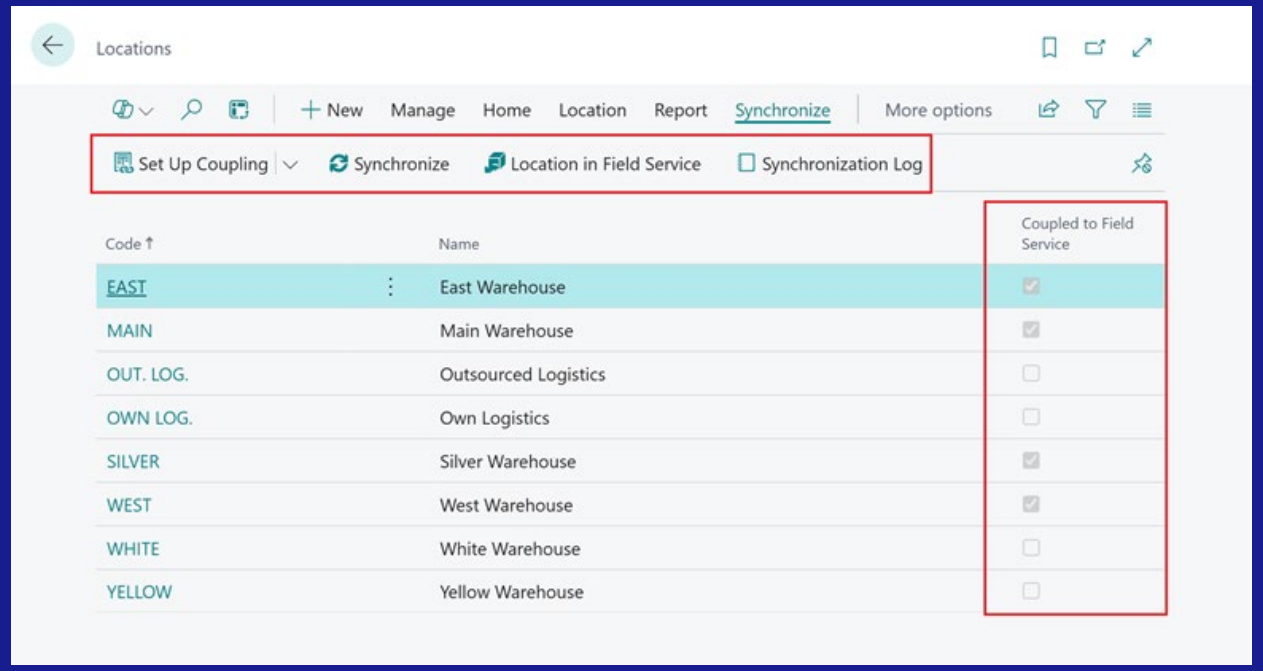


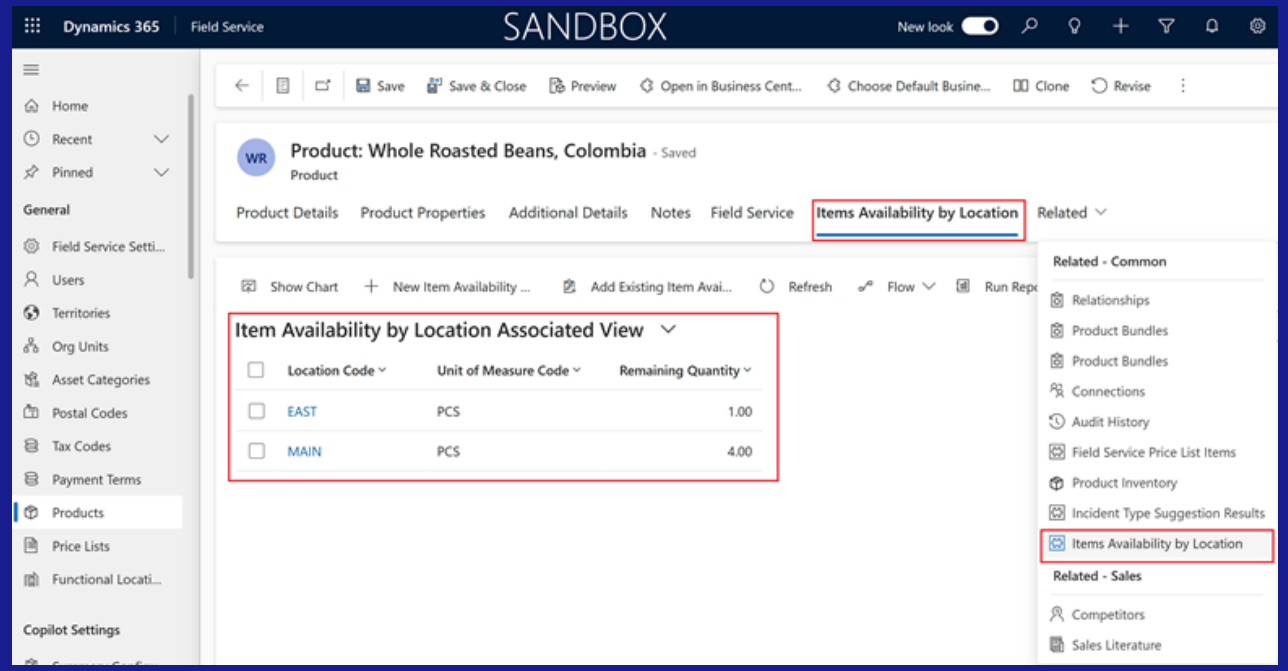
06

Sneak Peek of Dynamics 365 Business Central 2024 Release Wave 2

Application

View Item Availability in Field Service Work Orders

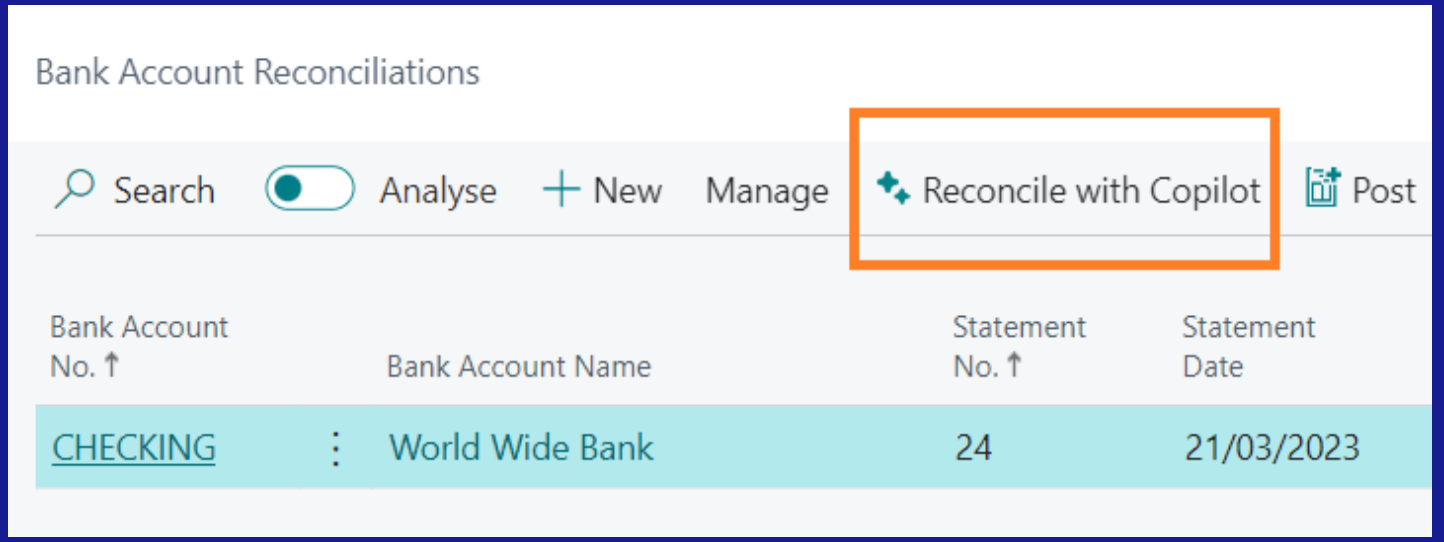


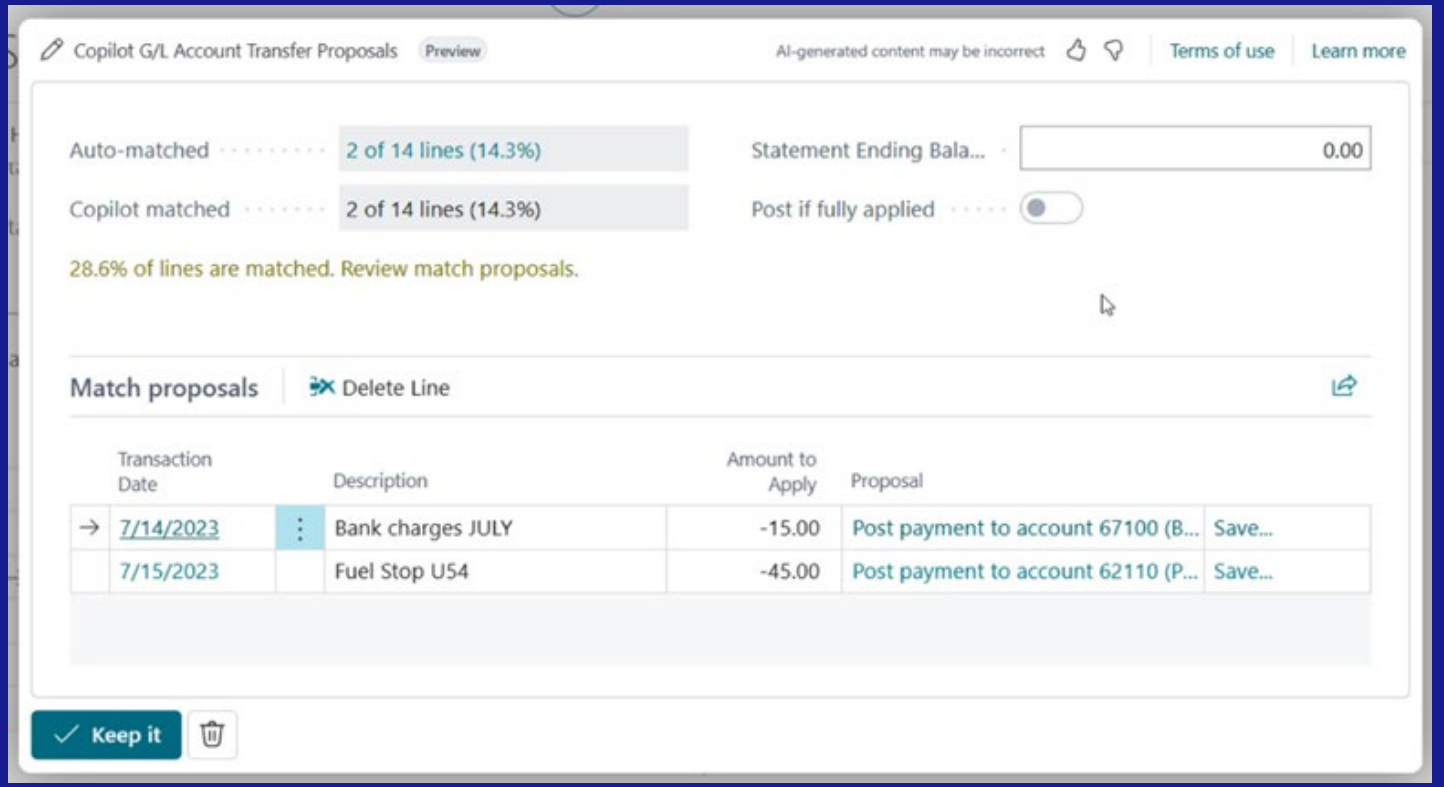


Copilot & AI Innovation

Complete Bank Account Reconciliation Faster With Copilot

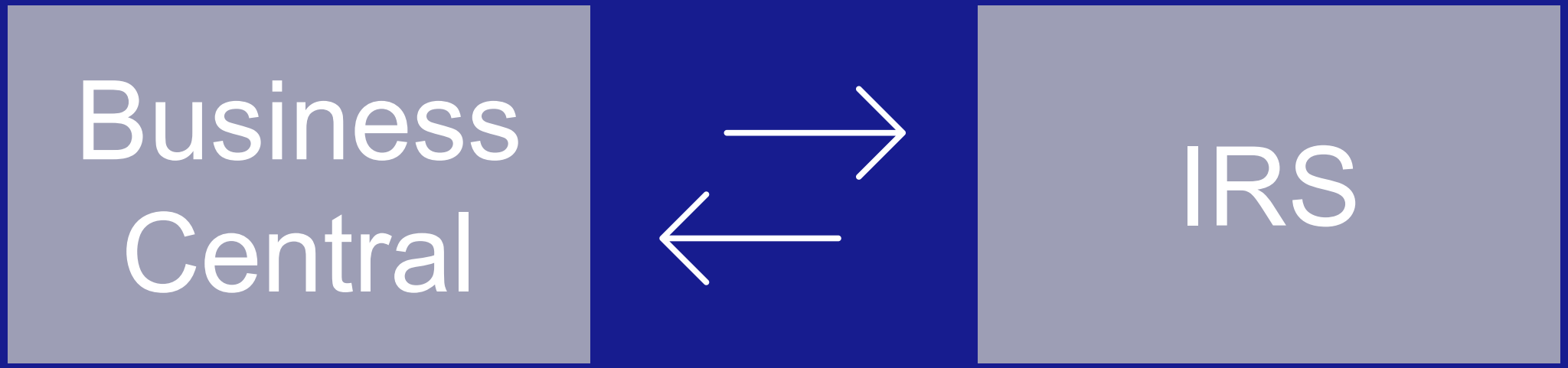
- AI-Powered Transaction Matching
- AI-Powered G/L Account Suggestions
- Built-In Demo Data





Country & Regional

Start Using Integration With IRS for Form 1099 Submissions



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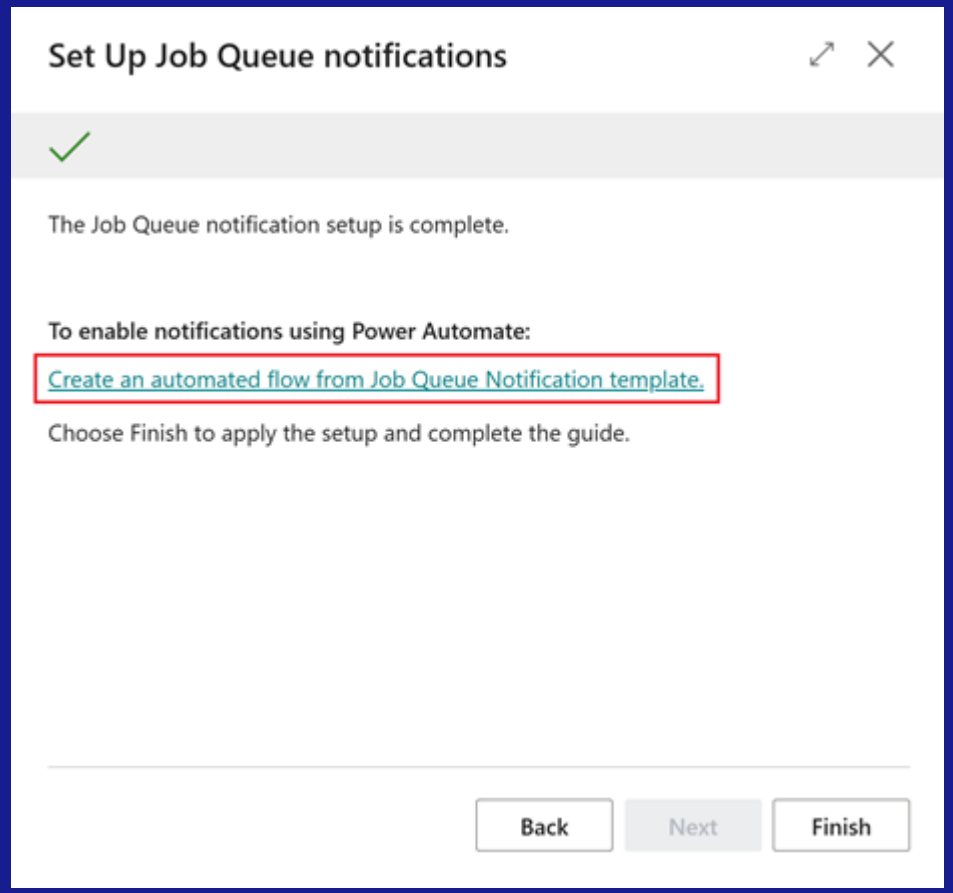
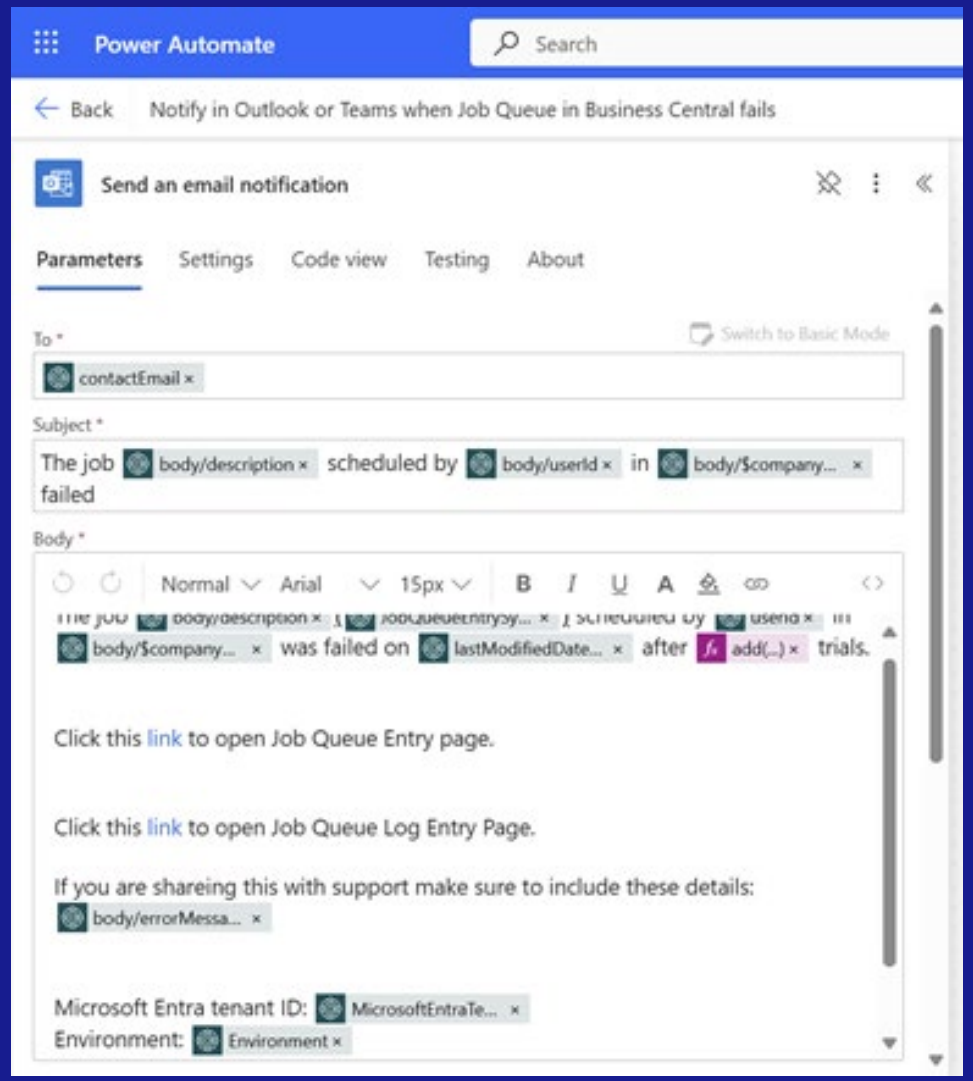
Governance & Administration

Get External Notifications When Job Queue Entries Fail





Q&A

Business Technology Services

Questions?

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