



Unlocking Efficiency: An Introduction to Business Central Business Technology Services

Stephanie Saculles & Brad Walovitch

Microsoft
Partner

forv/s
mazars

Global Presence

Top 10

Global Network*

\$5bn

Combined Revenue (2023)

100+

Combined Countries & Territories

400+

Combined Offices & Locations

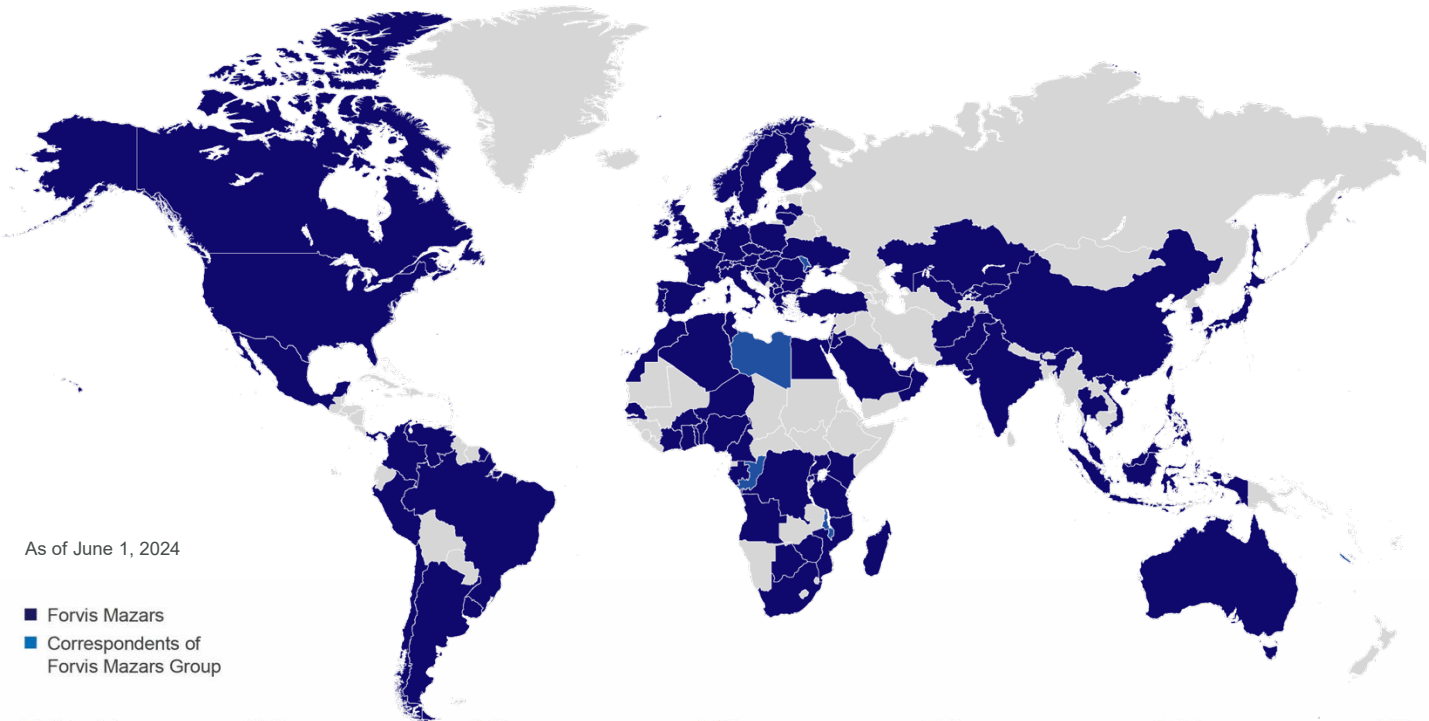
1,800+

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.



As of June 1, 2024

■ Forvis Mazars
■ Correspondents of Forvis Mazars Group

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

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



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

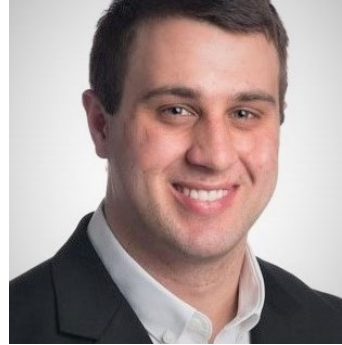
forvis
mazars

Today's Speakers

Microsoft Practice

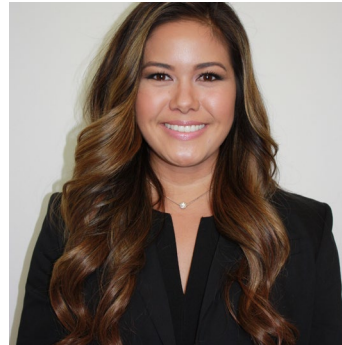
“Our team is focused on delivering an Unmatched Client Experience® on every engagement.”

– Chad Back, Partner



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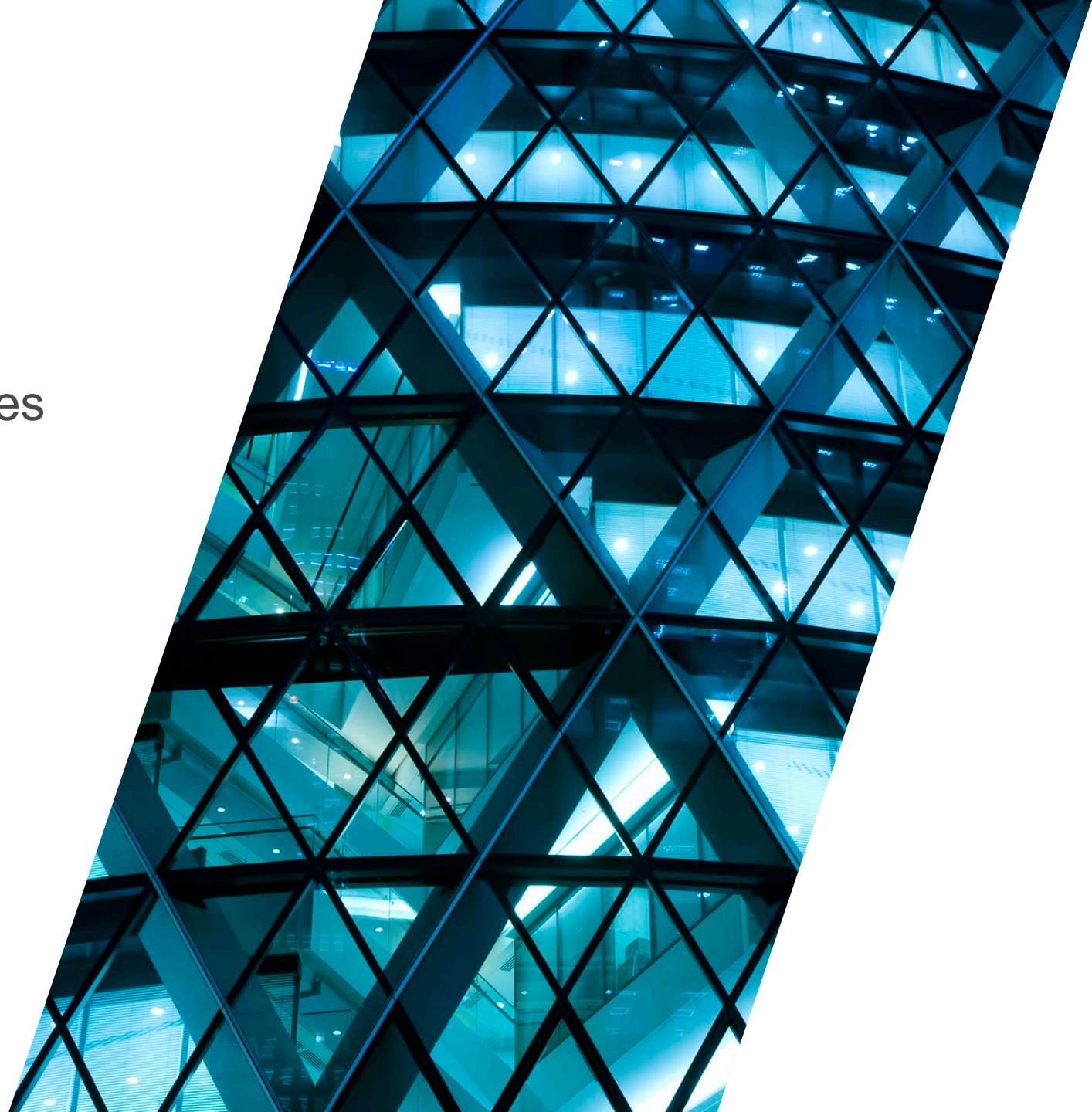
Agenda



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

01

Core Business Central Functionalities



Core Business Central Functionality

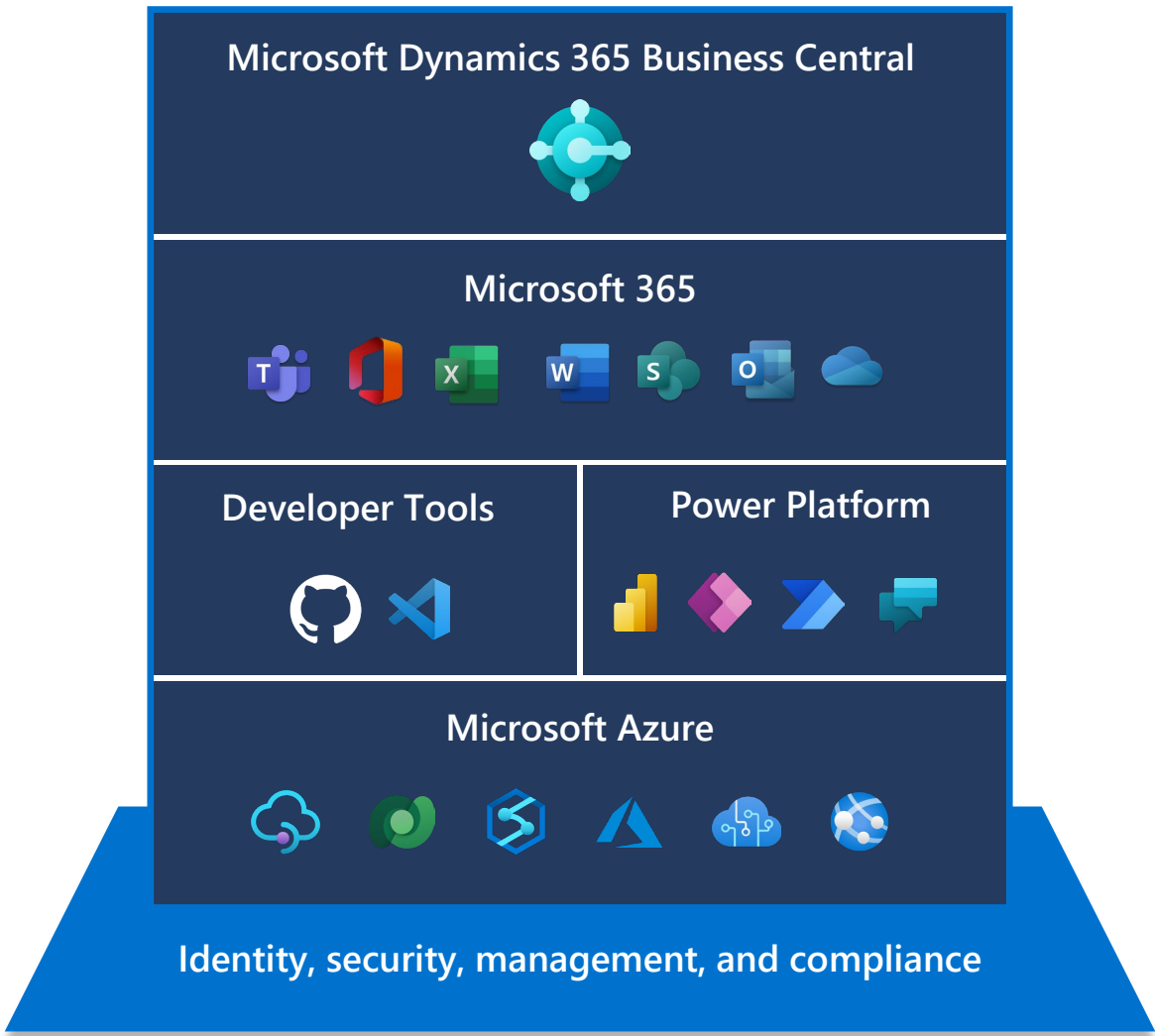
Business Central Modules

Quote to Cash <i>(Business Central + Outlook)</i>	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 <i>(Business Central)</i>	Enter a Sales Order	Create a New Company
Quote to Cash <i>(D365 Sales + Business Central)</i>	Automate Accounts Payable	Customer Approval Process	Intercompany
Enter a Sales Order	Drop Ship Sales Order	Reconcile Bank Accounts	Consolidations

Core Business Central Functionality

Fully Integrated Stack

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



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.



02

Business Challenges Addressed With Business Central

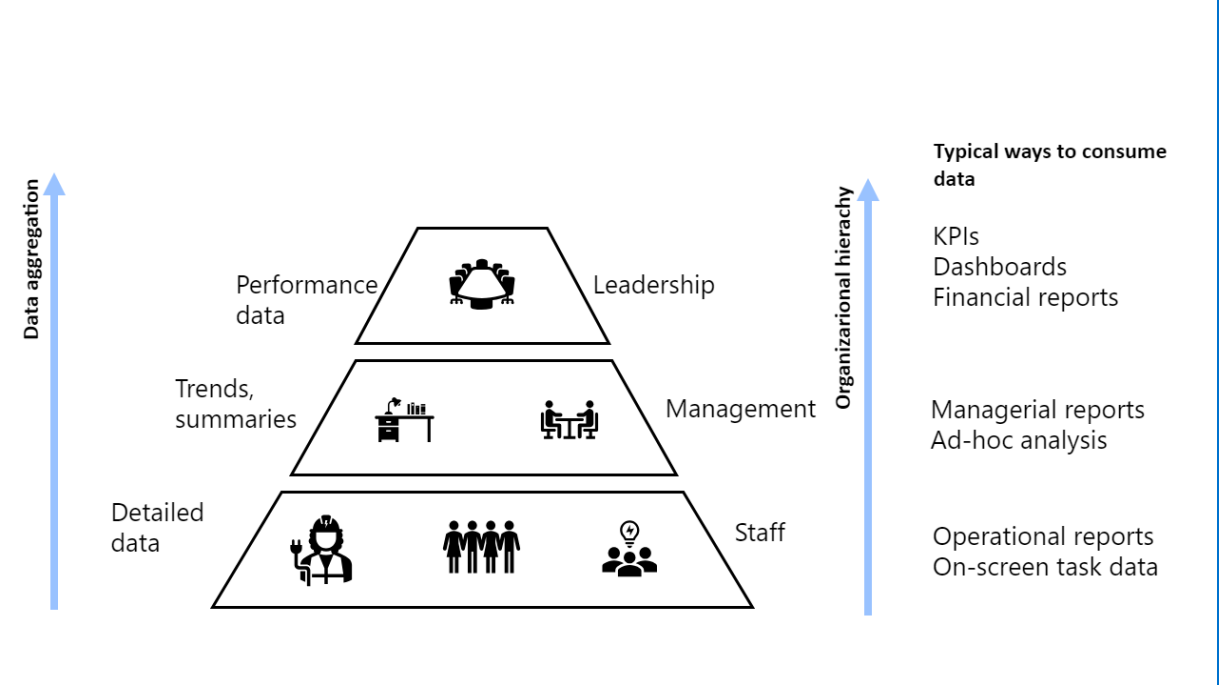
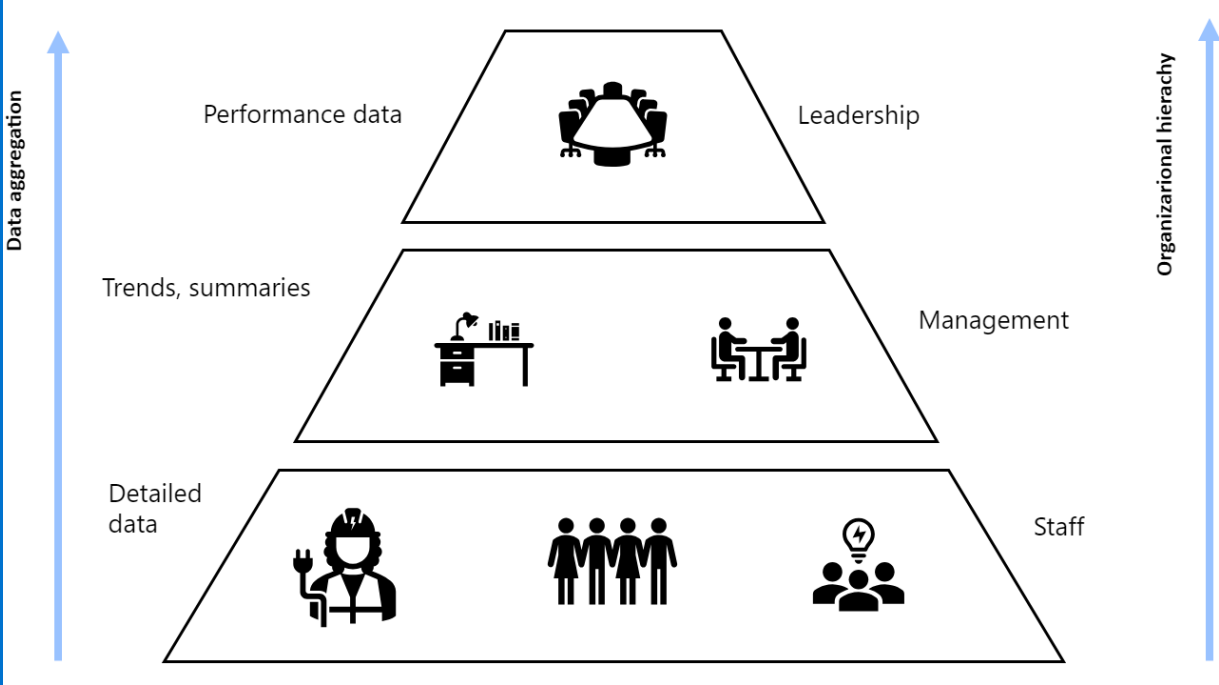


Business Challenges Addressed With Business Central Benefits



Business Challenges Addressed With Business Central

Review Business Health

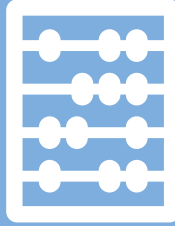


Business Challenges Addressed With Business Central

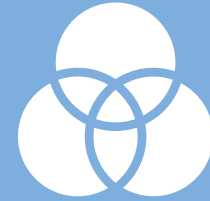
Identify Trends & Opportunities



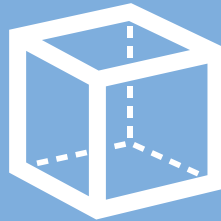
**Financial
Reports**



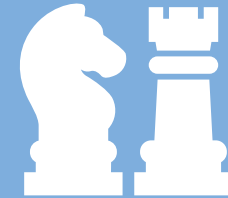
**Analyze Figures
in GL Accounts**



Compare Entries



Dimensions



**Strategic
Decision Making**

Business Challenges Addressed With Business Central

Review Customer History

Dynamics 365 Business Central

Customer Ledger Entries

Search ☐ Analyse ☒ Customer by sales volume

Customer Name	Document No.	Sum(Amount)	Sum(Remaining)
> Relecloud (83)		8,836.80	8,836.80
> Alpine Ski House (55)		4,316.92	4,316.92
> School of Fine Art (112)		53,833.52	53,833.52
> Trey Research (101)		4,214.60	4,214.60
> Adatum Corporation (68)		2,122.76	2,122.76
▼ Adatum Corporation - Discussion (1)			
	PS-INV103218	12.72	12.72
Sub Total Adatum Corporation - Discussion		12.72	12.72
Total		73,337.32	73,337.32

Rows: 420 Total Rows: 420 Filtered: 420

Customer Ledger Entries (1).xlsx

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Power Pivot Team Table Design

31/03/2022

Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Department Code	Customergroup Code	Currency Code	Original Amt
31/03/2022	31/03/2022	Invoice	PS-INV103197	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			3
26/03/2022	26/03/2022	Payment	PS-INV103192	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-4
26/03/2022	26/03/2022	Invoice	PS-INV103188	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			4
22/03/2022	22/03/2022	Payment	PS-INV103188	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
22/03/2022	22/03/2022	Invoice	PS-INV103188	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
28/02/2022	28/02/2022	Invoice	PS-INV103184	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			2
23/02/2022	23/02/2022	Payment	PS-INV103179	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-4
23/02/2022	23/02/2022	Invoice	PS-INV103179	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			4
31/01/2022	31/01/2022	Invoice	PS-INV103171	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			2
26/01/2022	26/01/2022	Payment	PS-INV103166	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-2
26/01/2022	26/01/2022	Invoice	PS-INV103166	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			2
22/01/2022	22/01/2022	Payment	PS-INV103162	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
22/01/2022	22/01/2022	Invoice	PS-INV103162	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
30/12/2021	30/12/2021	Payment	PS-INV103154	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
30/12/2021	30/12/2021	Invoice	PS-INV103154	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
26/12/2021	26/12/2021	Payment	PS-INV103151	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
26/12/2021	26/12/2021	Invoice	PS-INV103151	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
22/12/2021	22/12/2021	Payment	PS-INV103147	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
22/12/2021	22/12/2021	Invoice	PS-INV103147	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
29/11/2021	29/11/2021	Payment	PS-INV103142	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-2
29/11/2021	29/11/2021	Invoice	PS-INV103142	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			2
25/11/2021	25/11/2021	Payment	PS-INV103138	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-2
25/11/2021	25/11/2021	Invoice	PS-INV103138	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			2
21/11/2021	21/11/2021	Payment	PS-INV103135	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
21/11/2021	21/11/2021	Invoice	PS-INV103135	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
31/10/2021	31/10/2021	Payment	PS-INV103131	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-2
31/10/2021	31/10/2021	Invoice	PS-INV103131	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			2
26/10/2021	26/10/2021	Payment	PS-INV103126	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-4
26/10/2021	26/10/2021	Invoice	PS-INV103126	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			4
22/10/2021	22/10/2021	Payment	PS-INV103122	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
22/10/2021	22/10/2021	Invoice	PS-INV103122	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			
29/09/2021	29/09/2021	Payment	PS-INV103116	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-1
29/09/2021	29/09/2021	Invoice	PS-INV103116	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			1
25/09/2021	25/09/2021	Payment	PS-INV103112	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			-1
25/09/2021	25/09/2021	Invoice	PS-INV103112	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			1
21/09/2021	21/09/2021	Payment	PS-INV103109	50000	Relecloud	Invoice S-INVO SALES	MEDIUM			

Customer Ledger Entries

Business Challenges Addressed With Business Central Business Management

Adaptability

Intelligence

Financial Management

Customer Service

Security

03

Streamline Operations



Streamline Operations

Quote to Cash



Streamline Operations

Quote to Cash

File

Home

Send / Receive

Folder

View

Developer

Help

New Email

New Items

Delete

Archive

Reply

Reply All

Forward

Share to Teams

Move to: To Manager

Move to: Team Email

Move

Rules

Send to OneNote

Unread / Read

Follow Up

New Group

Browse Groups

Search People

Address Book

Filter Email

Read Aloud

Translate

All Apps

Reply with Scheduling Poll

Business Central

Viva Insights

Inbox

Unread

Delete

Forward

Reply

Reply All

New Email

Meeting

Focused

Other

By Date

Anne Weiler

Requests for sales quote

3:00 AM

Alan Steiner

Request for sales quote

Mon 2:21 PM

Microsoft on behalf of yo...

Congratulations Microsoft Dynamics ...

Sat 4/6

Dynamics 365 Business Ce...

Welcome to Microsoft Dynamics 365 ...

Fri 4/5

Requests for sales quote

AW

Anne Weiler <anne@CRM486571.OnMicrosoft>

To: Craig Gascas

9:00 AM

Attachment for Sales Quote Email.docx

154 KB

Start your reply all with:

Please see attached.

See attached quote.

Yes, I will check.

Feedback

Can you please provide information and a sales quote for the following items for our office remodel. Attached is a photo of the items we have ordered from you previously. Thank you for your prompt attention and I look forward to hearing from you.

Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

Regards,
Anne Weiler
Alpine Ski House

Business Central

Sales Quotes

+ New

Pop Out

Refresh

S-QU01002

Alpine Ski House

Ian Doberry

950.50

S-QU01003

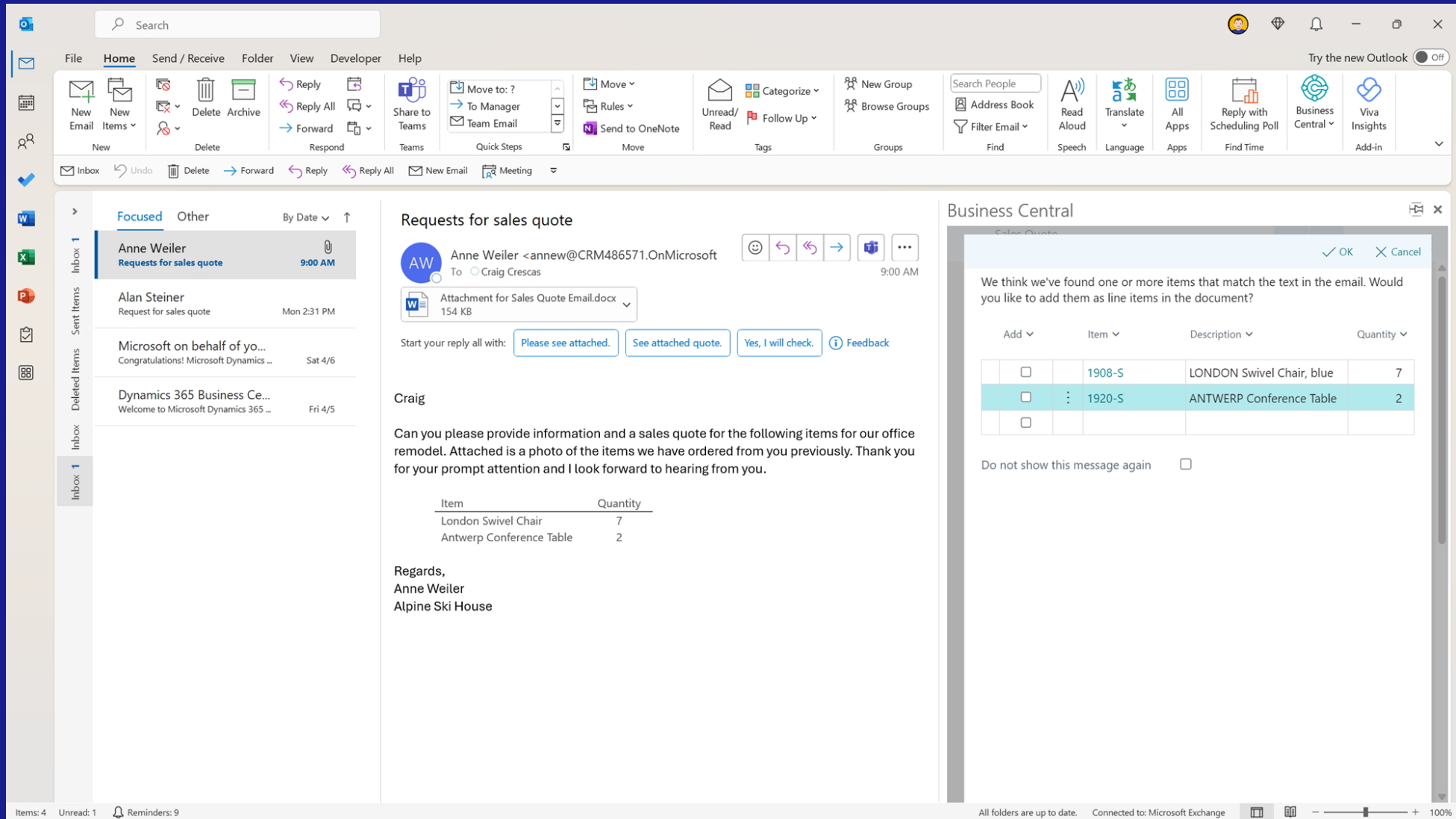
Alpine Ski House

Ian Doberry

0.00

Streamline Operations

Quote to Cash



Streamline Operations

Quote to Cash

Dynamics 365 Business Central

←

Sales Quote

✎

🔗

+

🗑️

✓ Saved

🔗

↗️

S-QUO1009 · Alpine Ski House

Home

Prepare

Print/Send

Request Approval

Quote

More options

📄 Make Order

📄 Make Invoice

📄 Release

▼

📄 Archive Document

General Show more

Customer Name

Alpine Ski House

Due Date

5/8/2024

External Document No.

Requested Delivery Date

Contact

Ian Deberry

Status

Open

Document Date

4/8/2024

Lines

🔗

Manage

Line

Functions

🔗 New Line

✖ Delete Line

🔍 Select items...

📄 Insert Ext. Text

📏 Dimensions

✚ Suggest sales lines

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	U
→ Item	1908-S		LONDON Swivel Chair, blue		7	0	PCS	
Item	1920-S		ANTWERP Conference Table		2	0	PCS	

Subtotal Excl. Tax (USD)

2,626.30

Total Excl. Tax (USD)

2,626.30

Inv. Discount Amount Excl. Tax...

0.00

Total Tax (USD)

183.84

Invoice Discount %

0

Total Incl. Tax (USD)

2,810.14

Details

Attachments (1)

Sell-to Customer Sales History

Customer No. 40000

3	0	1
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
28	28	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0	0	0
Posted Sales Credit Memos	GP Sales transactions	GP Receivables transactions

Sales Line Details

Item No. 1908-S

Required Quantity 7

Attachments

Documents

Streamline Operations

Quote to Cash

Requests for sales quote

AW

Anne Weiler <annew@CRM486571.OnMicrosoft>

To: Craig Crescas

Attachment for Sales Quote Email.docx

154 KB

Start your reply all with:

Please see attached.

See attached quote.

Yes, I will check.

Feedback

Craig

Can you please provide information and a sales quote for the following items for our office remodel. Attached is a photo of the items we have ordered from you previously. Thank you for your prompt attention and I look forward to hearing from you.

Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

Regards,
Anne Weiler
Alpine Ski House

Business Central

Sales Quote

Alpine Ski House

General

Customer NameAlpine Ski H

External Document No.

ContactIan Deberry

Document Date4/8/2024

Due Date5/8/2024

Requested Delivery Date

StatusOpen

Lines

Type	No.	Item Reference No.
Item	1908-S	
Item	1920-S	

Process

Make Order

Make Invoice

Archive Document

Release

Release

Reopen

Prepare

Copy Document...

Get Recurring Sales Lines...

Calculate Invoice Discount

Incoming Document

Print/Send

Send by Email

Streamline Operations

Quote to Cash

Requests for sales quote

AW

Anne Weiler <annew@CRM486571.OnMicrosoft>

To: Craig Crescas

9:00 AM

Attachment for Sales Quote Email.docx

154 KB

Start your reply all with:

Please see attached.

See attached quote.

Yes, I will check.

Feedback

Craig

Can you please provide information and a sales quote for the following items for our office remodel. Attached is a photo of the items we have ordered from you previously. Thank you for your prompt attention and I look forward to hearing from you.

Item	Quantity
London Swivel Chair	7
Antwerp Conference Table	2

Regards,
Anne Weiler
Alpine Ski House

Business Central

Sales Quote

Alpine Ski House

General

Customer Name: Alpine Ski H

External Document No.

Contact: Ian Deberry

Document Date: 4/8/2024

Due Date: 5/8/2024

Requested Delivery Date

Status: Open

Lines

Type	No.	Item Reference No.
Item	1908-S	
Item	1920-S	

Process

Make Order

Make Invoice

Archive Document

Release

Release

Reopen

Prepare

Copy Document...

Get Recurring Sales Lines...

Calculate Invoice Discount

Incoming Document

Print/Send

Send by Email

Streamline Operations

Quote to Cash

Business Central

Sales Quote

Alpine Ski House

General

Show more

Customer Name

Alpine Ski House

External Document No.

Contact

Ian Deberry

Document Date

4/8/2024

Due Date

5/8/2024

Documented Business Date

?

Do you want to convert the quote to an invoice?

Yes

No

Streamline Operations

Quote to Cash

Business Central

Sales Invoice
S-INV102222 · Alpine Ski House

Details Edit Pop Out Refresh

General

Customer Name Alpine Ski House

Contact Ian Deberry

Document Date 4/8/2024

Posting Date 4/8/2024

Due Date 5/8/2024

Status Open

Lines

Type	No.	Item Reference No.
Item	1908-S	
Item	1920-S	

Subtotal Excl. Tax (USD)

Inv. Discount Amount Excl. Tax (...)

Posting

Post

Post and Send...

Preview Posting

Post and New...

Release

Release

Reopen

Prepare

Copy Document...

Get Recurring Sales Lines...

Incoming Document

Calculate Invoice Discount

Move Negative Lines...

Print/Send

Streamline Operations

Quote to Cash

←

Cash Receipt Journals

Batch Name

GENERAL

🕒

🔍

Manage

Home

Request Approval

Line

Page

More options

📄

Post

🔢

Renumber Document Numbers

🔍

Reconcile

📄

Apply Entries...

	Posting Date		Account No.	Description	Amount	Amount (\$)	Bal. Account Type	Bal. Account No.	App... (Yes...)	Applies-to Doc. Type	Applies-to Doc. No.	Corr...	Dep. Code
→	4/8/2024	⋮	40000	Alpine Ski House	2,810.14	2,810.14	G/L Account	18200	<input checked="" type="checkbox"/>	Invoice	PS-INV103215	<input type="checkbox"/>	SAL

Streamline Operations

Email

Assign scenarios to account Current User (BKDdemo@BKDLLPdemo.onmicrosoft.com)

Email scenario ↑	
→	<u>Customer Statement</u>
	Email Printer
	Finance Charge
	Interaction Template
	Invite External Accountant
	Job Planning Line Calendar
	Notification
	Posted Vendor Remittance
	Purchase Order
	Purchase Quote
	Reminder
	Sales Credit Memo
	Sales Invoice
	Sales Quote
	Service Credit Memo
	Service Invoice
	Service Order
	Service Quote
	Vendor Remittance

Streamline Operations

Email

←

Sales Order

✓ Saved

Email Scenario Attachments

✓

Edit List

New

Download attachment

...

File Name

→

Thank you for your business!.docx

⋮

Attach by Default

☒

Streamline Operations

Email

Cronus SSM - Sales Order S-ORD101014

Send email

Discard draft

Use Word template

Show source document

Page

Cc

Bcc

Subject

Cronus SSM - Sales Order S-ORD101014

Message

Order No.	Due Date	Total USD
S-ORD101014	January 31, 2033	50.00

If we receive the payment before 01/08/33, you are eligible for a 2% payment discount.

Sincerely,
Jim Olive

Attachments

Add files

Add files from default selection

Add file from source document

	File Name		File Size
→	Sales Order S-ORD101014.pdf	⋮	60 KB
	Thank you for your business!.docx		13 KB

Streamline Operations

Manage Your Inventory

Dynamics 365 Business Central

Cronus SSM

Reference Data Journals Worksheet Registered Documents All Reports

Picks Put-aways Movements Warehouse Shipments Released Partially Picked Completely Picked Partially Shipped Warehouse Receipts Partially Received Transfer Orders More

Headline

Want to learn more about Business Central?

Actions

> Whse. Physical Invt. Journal

> Whse. Item Journal

> Pick Worksheet

> Put-away Worksheet

> Movement Worksheet

> Item Inquiry

> Item Bin Content Inquiry

Warehouse Bin List

Warehouse Adjustment Bin

Whse. Phys. Inventory List

Prod. Order Picking List

Customer Labels

Shipping Labels

Activities

Outbound

Unassigned Picks

0

>

My Picks

0

>

Inbound

Unassigned Put-aways

0

>

My Put-aways

0

>

Internal

Unassigned Movements

0

>

My Movements

0

>

User Tasks

My User Tasks

Pending User Tasks

18

>

Email Status

Email Activities

Failed Emails in Outbox

625

>

Draft Emails in Outbox

2

>

Sent Emails Last 30 Days

3

>

Approvals

Pending Approvals

Requests Sent ... Approval

0

>

Requests to Approve

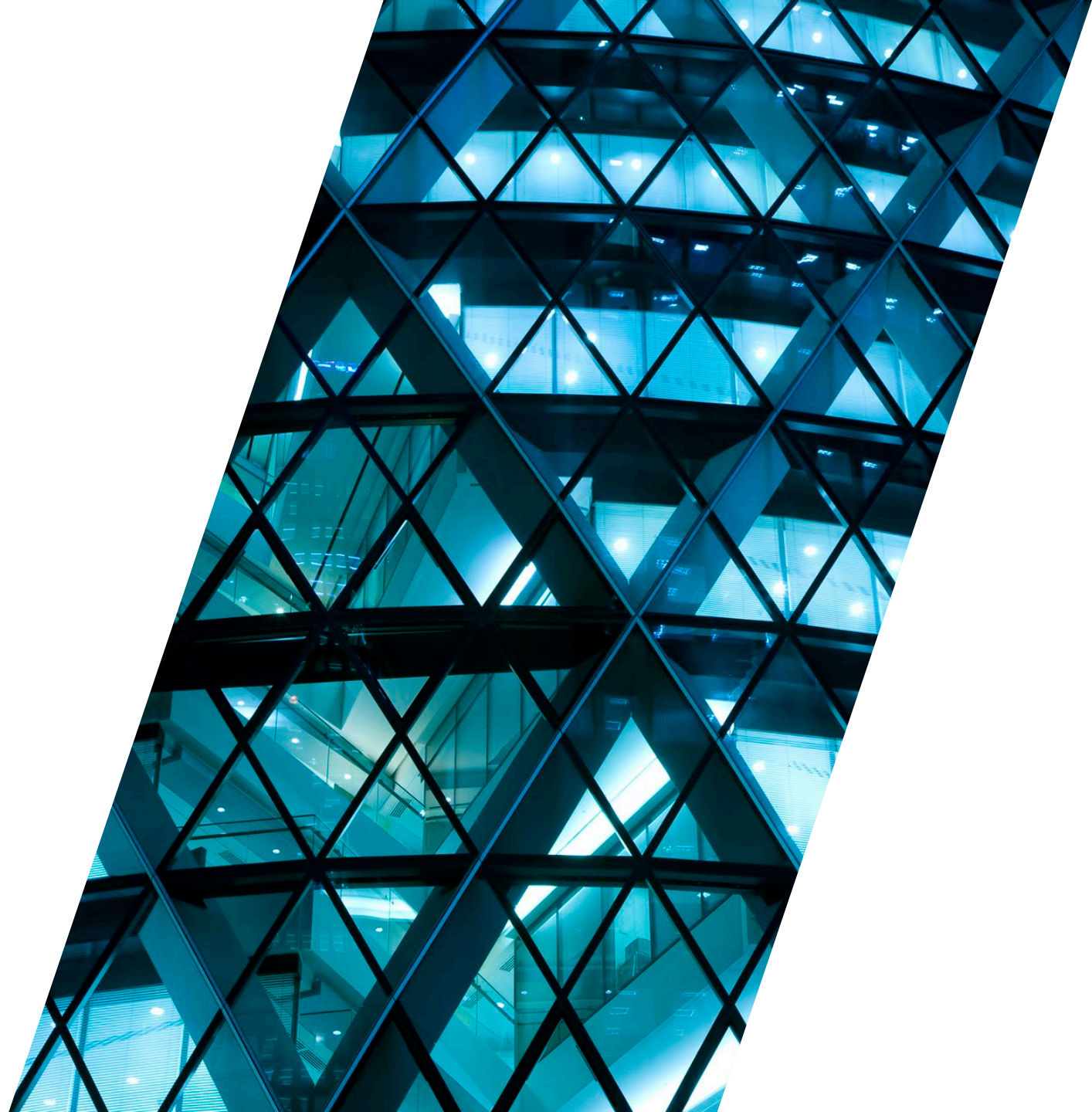
0

>

forv/s
mazars

04

Improve Financial Management



Improve Financial Management Benefits



Improve Financial Management

Quick Access to Financials

Dynamics 365 Business Central

Environment: Production

FD

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

All Reports

Customers

Vendors

Items

Bank Accounts

Chart of Accounts

Posting Test Setup

Get started

Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

Show demo tours



Some features connect to other Microsoft services

Activities

Sales This Month

\$1,906

> See more

Overdue Sales Invoice Amount

\$63,890

> See more

Overdue Purch. Invoice Amount

\$49,422

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes

1

Sales Orders

10

Completely Re... from Stock

0

Sales Invoices

7

Ongoing Purchases

Purchase Orders

14

Ongoing Purch... Invoices

3

Purch. Invoices... Next Week

0

Payments

Unprocessed Payments

1

Average Collec... Days

5.9

Outstanding V... Invoices

13

Scan documents

Create Incomin... from Camera

Improve Financial Management

Add a New Account to GL

Dynamics 365 Business Central

Environment Production

FD

CRONUS USA, Inc.

FinanceCash ManagementSalesPurchasing

All Reports

Customers

Vendors

Items

Bank Accounts

Chart of Accounts

Posting Test Setup

Get started

Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

Show demo tours

Some features connect to other Microsoft services

Activities

Sales This Month

\$1,906

> See more

Overdue Sales Invoice Amount

\$63,890

> See more

Overdue Purch. Invoice Amount

\$49,422

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes

1

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10

Completely Re... from Stock

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Outstanding V... Invoices

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Scan documents

Create Incomin... from Camera

Improve Financial Management

Enter a Journal Expense (via Excel Import)

Dynamics 365 Business Central

General Journals

✓ Saved

Batch Name: DEFAULT

Manage

Home

Request Approval

Payroll

Line

Incoming Document

Page

More options

Post

Get Standard Journals...

Renumber Document Numbers

Reconcile

Apply Entries...

Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Amount	Amount (\$)	Curr
→ 4/8/2024	Invoice	062425	G/L Account				0.00	0.00	

Number of Lines

Balance

Total Balance

1

0.00

0.00

Journal Line Details

Posting Group

Account

Account Name

General Posting Setup

Tax Posting Setup

Balance Account

Bal. Account Name

General Posting Setup

Tax Posting Setup

Dimensions

Open in Excel

Edit in Excel

Share to Teams

Copy link

Lines checked

Lines with issues

Issues Total

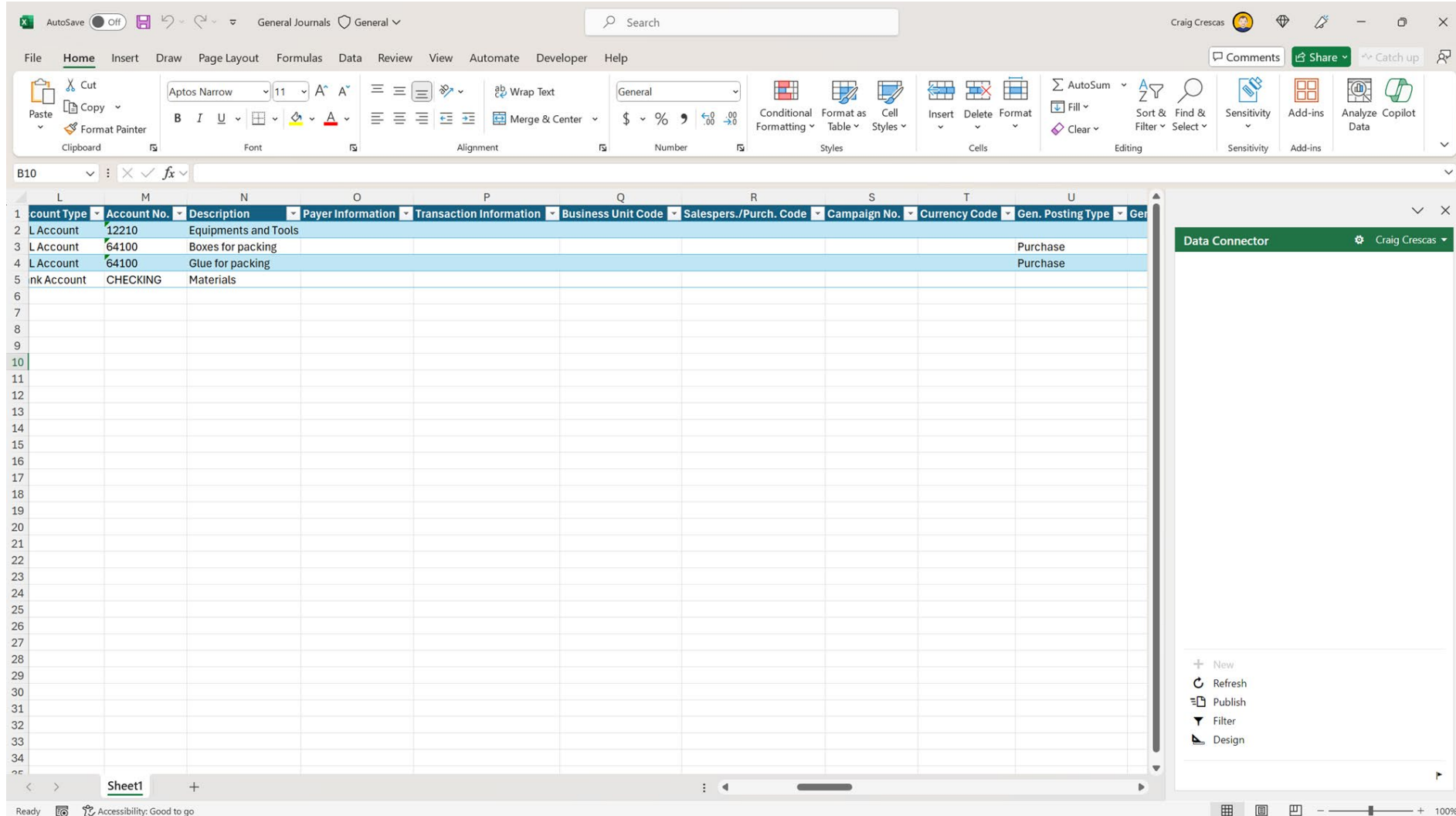
Refresh

Current line

No issues found.

Improve Financial Management

Enter a Journal Expense (via Excel Import)



Improve Financial Management

Enter a Journal Expense (via Excel Import)

Dynamics 365 Business Central

General Journals

✓ Saved

Batch Name

DEFAULT

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Get Standard Journals...

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Apply Entries...

	Posting Date	Document Type	Document No.	Account Type	Account No.	Account Name	Description	Amount	Amount (\$)	Currency Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	T
→	4/8/2024	Invoice	062425	G/L Account	12210	Equipments and Tools	Equipments and Tools	171.01	171.01					
	4/8/2024	Invoice	062425	G/L Account	64100	Office Supplies	Boxes for packing	37.95	37.95		Purchase			
	4/8/2024	Invoice	062425	G/L Account	64100	Office Supplies	Glue for packing	42.76	42.76		Purchase			
	4/8/2024	Invoice	062425	Bank Acco...	CHECKING	World Wide Bank	Materials	251.72	251.72					

Number of Lines

4

Balance

171.01

Total Balance

503.44

Improve Financial Management Analysis With Copilot

Dynamics 365 Business Central

Environment: Production

FD

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

All Reports

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Create Incomin... from Camera

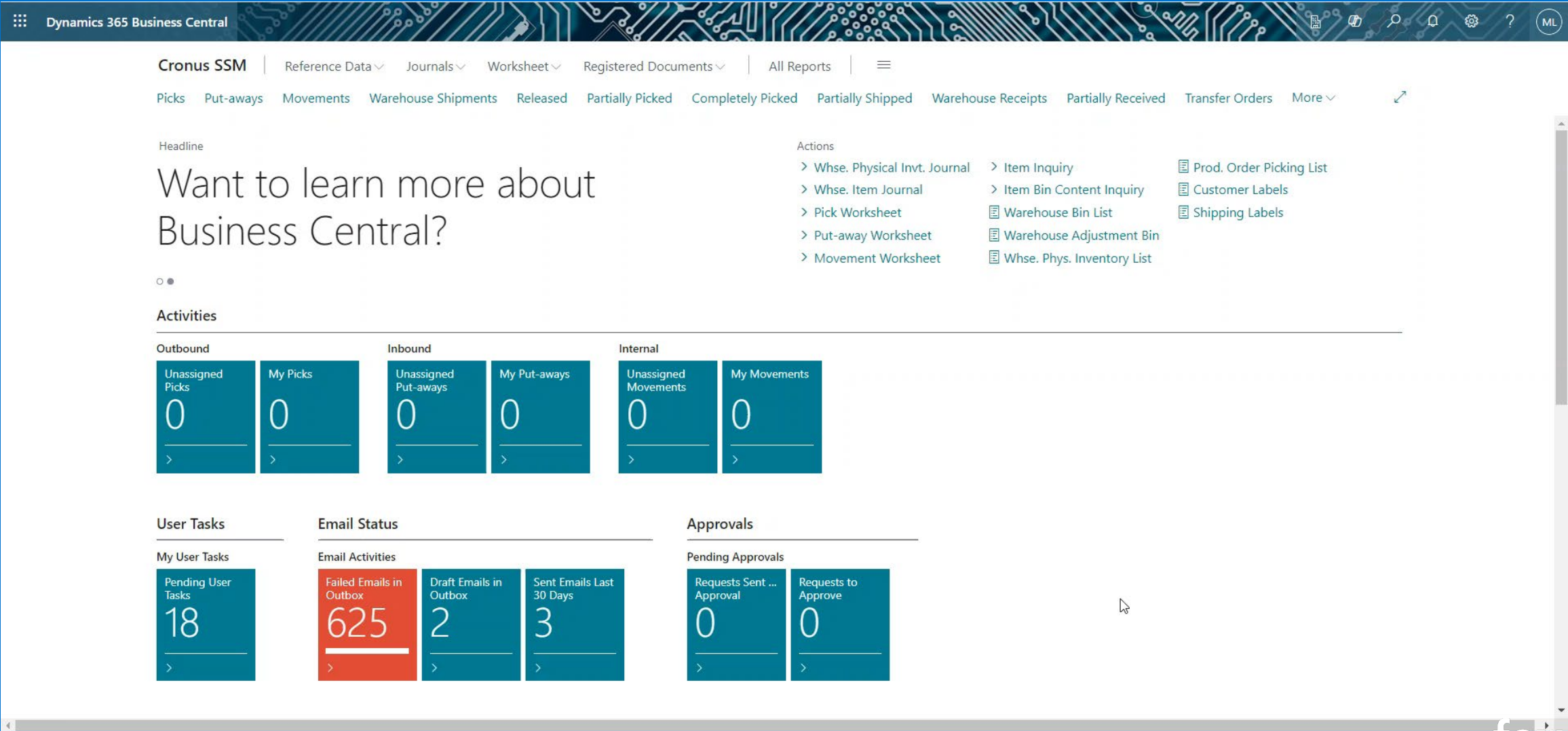
05

Improve Customer Satisfaction



Improve Customer Satisfaction

Analysis With Copilot



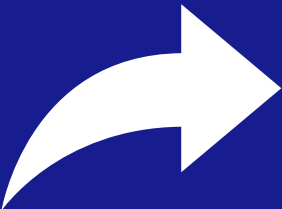
06

Sneak Peek of Dynamics 365
Business Central 2024 Release
Wave 2



Application

View Item Availability in Field Service Work Orders



Locations

Set Up Coupling | Synchronize | Location in Field Service | Synchronization Log

Code ↑	Name	Coupled to Field Service
EAST	East Warehouse	<input checked="" type="checkbox"/>
MAIN	Main Warehouse	<input checked="" type="checkbox"/>
OUT. LOG.	Outsourced Logistics	<input type="checkbox"/>
OWN LOG.	Own Logistics	<input type="checkbox"/>
SILVER	Silver Warehouse	<input checked="" type="checkbox"/>
WEST	West Warehouse	<input checked="" type="checkbox"/>
WHITE	White Warehouse	<input type="checkbox"/>
YELLOW	Yellow Warehouse	<input type="checkbox"/>

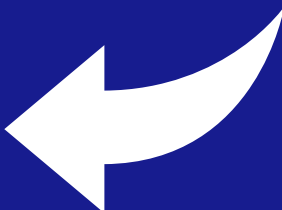
Dynamics 365 | Field Service | SANDBOX

Product: Whole Roasted Beans, Colombia - Saved

Items Availability by Location

Item Availability by Location Associated View

Location Code	Unit of Measure Code	Remaining Quantity
EAST	PCS	1.00
MAIN	PCS	4.00



Copilot & AI Innovation

Complete Bank Account Reconciliation Faster With Copilot

AI-Powered Transaction Matching

AI-Powered G/L Account Suggestions

Built-In Demo Data

Bank Account Reconciliations

Search

Analyse

+

New

Manage

Reconcile with Copilot

Post

Bank Account

No. ↑

Bank Account Name

Statement

No. ↑

Statement

Date

CHECKING

:

World Wide Bank

24

21/03/2023

Copilot G/L Account Transfer Proposals

Preview

AI-generated content may be incorrect

Terms of use

Learn more

Auto-matched

2 of 14 lines (14.3%)

Statement Ending Bala...

0.00

Copilot matched

2 of 14 lines (14.3%)

Post if fully applied

28.6% of lines are matched. Review match proposals.

Match proposals

Delete Line

Transaction

Date

Description

Amount to

Apply

Proposal

→ 7/14/2023

:

Bank charges JULY

-15.00

Post payment to account 67100 (B...

Save...

7/15/2023

:

Fuel Stop U54

-45.00

Post payment to account 62110 (P...

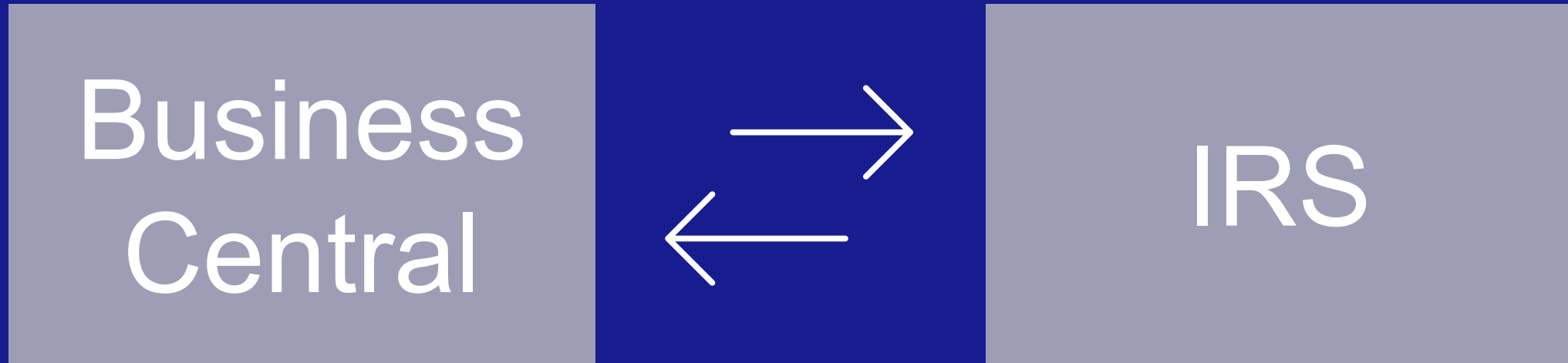
Save...

✓

Keep it

Country & Regional


Start Using Integration With IRS for Form 1099 Submissions



Governance & Administration

Get External Notifications When Job Queue Entries Fail

Set Up Job Queue notifications



The Job Queue notification setup is complete.

To enable notifications using Power Automate:

[Create an automated flow from Job Queue Notification template.](#)

Choose Finish to apply the setup and complete the guide.

BackNextFinish

Power Automate

Search

Back Notify in Outlook or Teams when Job Queue in Business Central fails

Send an email notification

Parameters Settings Code view Testing About

To * Switch to Basic Mode

contactEmail x

Subject *

The job body/description x scheduled by body/userId x in body/\$company... x failed

Body *

Normal Arial 15px B I U A

The job body/description x scheduled by body/userId x in body/\$company... x was failed on lastModifiedDate... x after add(...) x trials.

Click this link to open Job Queue Entry page.

Click this link to open Job Queue Log Entry Page.

If you are sharing this with support make sure to include these details:

body/errorMessa... x

Microsoft Entra tenant ID: MicrosoftEntraTe... x

Environment: Environment x

Q&A



Business
Technology
Services

Questions?



Thank You!

The information set forth in this presentation contains the analysis and conclusions of the author(s) based upon his/her/their research and analysis of industry information and legal authorities. Such analysis and conclusions should not be deemed opinions or conclusions by Forvis Mazars or the author(s) as to any individual situation as situations are fact-specific. The reader should perform their own analysis and form their own conclusions regarding any specific situation. Further, the author(s)' conclusions may be revised without notice with or without changes in industry information and legal authorities.

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