



Complexity to Clarity: Modern Traceability for Manufacturers

August 2026

Global Presence

Top 10

Global Network*

\$5bn

Combined Revenue (2023)

100+

Combined Countries & Territories

400+

Combined Offices & Locations

1,800+

Combined Partners

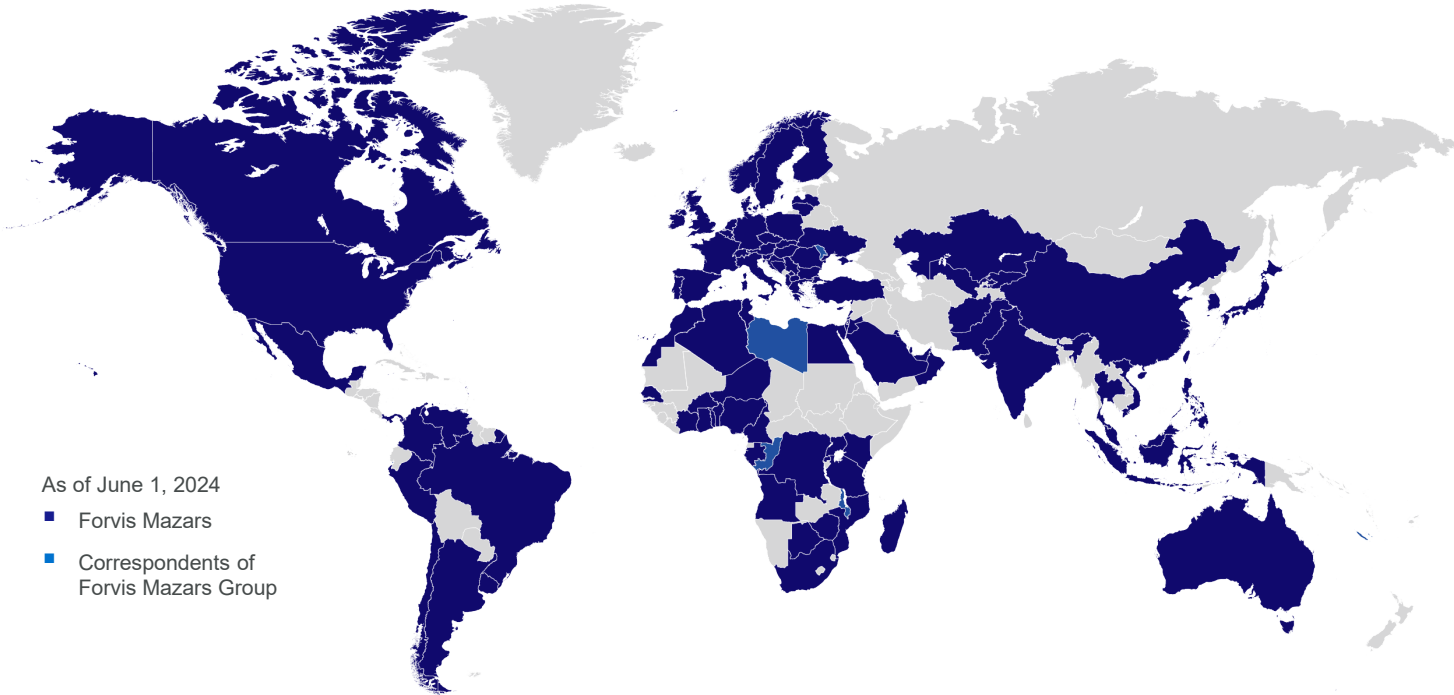
40,000+

Combined Employees

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

2023 revenues: FORVIS \$1.7bn (€1.6bn), Mazars (estimated) \$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 | ■ Gabon | ■ Kuwait | ■ New Caledonia | ■ Senegal | ■ United Arab Emirates |
| ■ Albania | ■ Canada | ■ Germany | ■ Kyrgyzstan | ■ Niger | ■ Serbia | ■ United Kingdom |
| ■ Algeria | ■ Cayman Islands | ■ Ghana | ■ Latvia | ■ Nigeria | ■ Singapore | ■ United States |
| ■ Angola | ■ Chile | ■ Greece | ■ Lebanon | ■ North Macedonia | ■ Slovakia | ■ Uruguay |
| ■ Argentina | ■ China | ■ Hong Kong | ■ Libya | ■ Norway | ■ Slovenia | ■ Uzbekistan |
| ■ Australia | ■ Colombia | ■ Hungary | ■ Lithuania | ■ Oman | ■ South Africa | ■ Venezuela |
| ■ Austria | ■ Congo | ■ India | ■ Luxembourg | ■ Pakistan | ■ Spain | ■ Vietnam |
| ■ Bahrain | ■ Côte d'Ivoire | ■ Indonesia | ■ Madagascar | ■ Palestine | ■ Sweden | ■ Zimbabwe |
| ■ Belgium | ■ Croatia | ■ Ireland | ■ Malawi | ■ Panama | ■ Switzerland | |
| ■ Benin | ■ Cyprus | ■ Israel | ■ Malaysia | ■ Peru | ■ Taiwan | |
| ■ Bermuda | ■ Czech Republic | ■ Italy | ■ Malta | ■ Philippines | ■ Tanzania | |
| ■ Bosnia and Herzegovina | ■ Democratic Republic of the Congo (DRC) | ■ Japan | ■ Mauritius | ■ Poland | ■ Thailand | |
| ■ Botswana | ■ Denmark | ■ Jordan | ■ Mexico | ■ Portugal | ■ Togo | |
| ■ Brazil | ■ Egypt | ■ Kazakhstan | ■ Moldova | ■ Qatar | ■ Tunisia | |
| ■ Bulgaria | ■ Finland | ■ Kenya | ■ Morocco | ■ Romania | ■ Turkey | |
| ■ Burkina Faso | ■ France | ■ Korea | ■ Mozambique | ■ Rwanda | ■ Uganda | |
| | | ■ Kosovo | ■ Netherlands | ■ Saudi Arabia | ■ Ukraine | |

U.S. Presence

Leading U.S. Firm

\$2.24B

Revenue (FY 2025)¹

77

Markets

31

States

600+

Partners & Principals

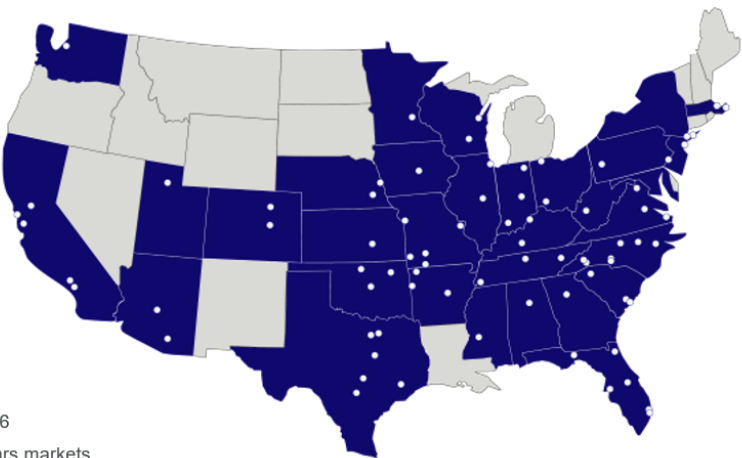
7,000+

Employees

84

Net Promoter Score^{® 2}

(“World-Class” Ranking)



As of May 2026
○ Forvis Mazars markets

Alabama Birmingham	Georgia Atlanta	Missouri Branson Joplin Kansas City Springfield St. Louis	Ohio Cincinnati Toledo	Texas Austin Dallas Fort Worth Houston San Antonio Waco
Arizona Phoenix Tucson	Illinois Chicago Decatur	Nebraska Lincoln Omaha	Oklahoma Enid Oklahoma City Tulsa	Utah Salt Lake City
Arkansas Fort Smith Little Rock Rogers	Indiana Evansville Fort Wayne Indianapolis	New Jersey Iselin	Pennsylvania Philadelphia- Metro Area Pittsburgh	Virginia Norfolk Richmond
California Irvine Los Angeles Sacramento San Francisco San Jose	Iowa Des Moines	New York Long Island New York City	South Carolina Charleston Greenville Summerville	Washington D.C. Metro Area
Colorado Colorado Springs Denver	Kansas Wichita	North Carolina Asheville Charlotte SouthPark Charlotte Uptown Greensboro Greenville Hendersonville Raleigh	Tennessee Knoxville Memphis Nashville	Washington Seattle
Florida Boca Raton Fort Lauderdale Jacksonville Orlando Tallahassee Tampa Bay	Kentucky Bowling Green Louisville			West Virginia Charleston
	Massachusetts Boston Brewster			Wisconsin Appleton Madison
	Minnesota Minneapolis			
	Mississippi Jackson			

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¹FY 2025 revenue: period ending 5/31/25.
²FYE25 Relational Survey NPS results reflect responses from participating clients.
Updated 08/08/2026

Business Technology Services

We solve for business challenges and support innovation through technology solutions.

Our toolbox is equipped with leading enterprise resource planning (ERP), customer relationship management (CRM), artificial intelligence (AI), automation, and business intelligence (BI) tools.

Our end-to-end and managed service solutions help clients achieve their digital transformation goals. Services include:

- | | | | |
|--|--|---|--|
|  | Solution Assessment and Selection |  | Implementation Project Rescues |
|  | System Implementation and Integration |  | Business Intelligence (BI) and Analytics |
|  | Process and Technology Design |  | Robotic Process Automation (RPA) |
|  | Upgrades, Enhancements, and Automation |  | Custom Application Development |
|  | Training, Monitoring, and Support |  | IT and Cybersecurity Managed Services |



Today's Presenters



Chris Segurado

Microsoft MVP – Business Technology Services
Forvis Mazars



Ban Luo

Principal Product Manager
Microsoft

Objectives

1. Address traceability and compliance challenges
2. Simplify tracking and compliance with EBR
3. Improve visibility with connected workflows.



Agenda

1. Welcome & Introduction
2. Understanding the Need for Traceability
3. Overview of Dynamics 365 Traceability
4. Demonstration of Traceability Capabilities
5. Best Practices & Lessons Learned
6. Closing Remarks & QA

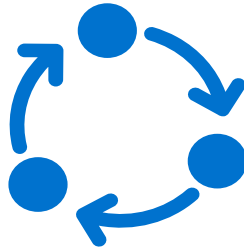


Understanding The Need For Traceability



Compliance

Avoid risk, meet regulations



Consistency

Control process variability & quality



Traceability

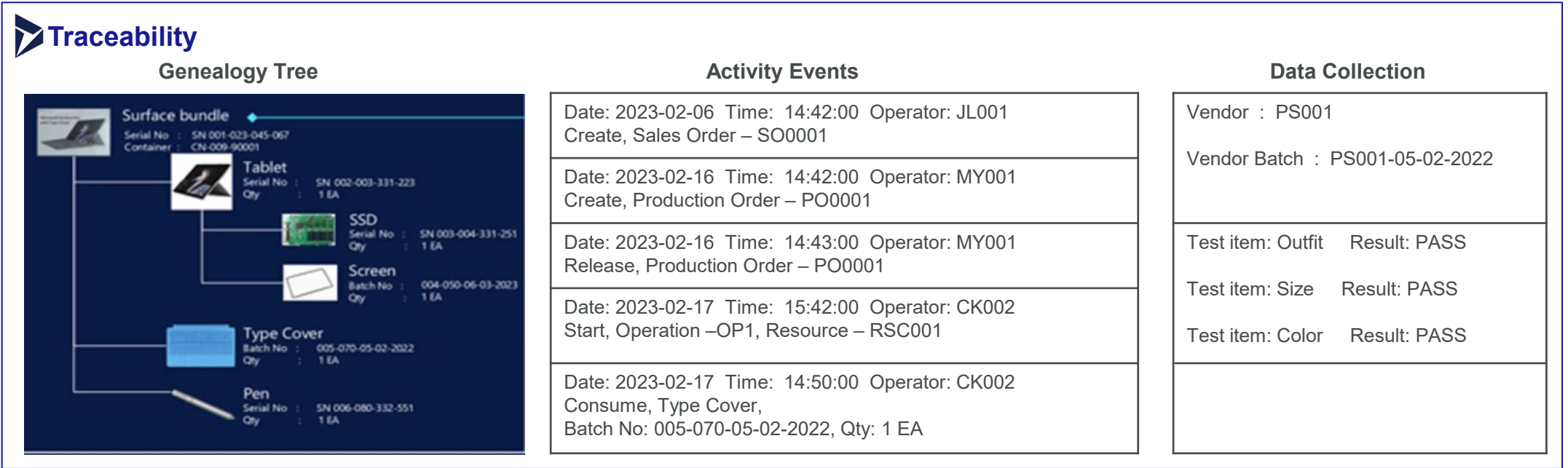
Know every step, every batch



Trust

Protect brand & consumers

Genealogy & Custody Events



Overview of Dynamics 365 Traceability Add-in

Key Features

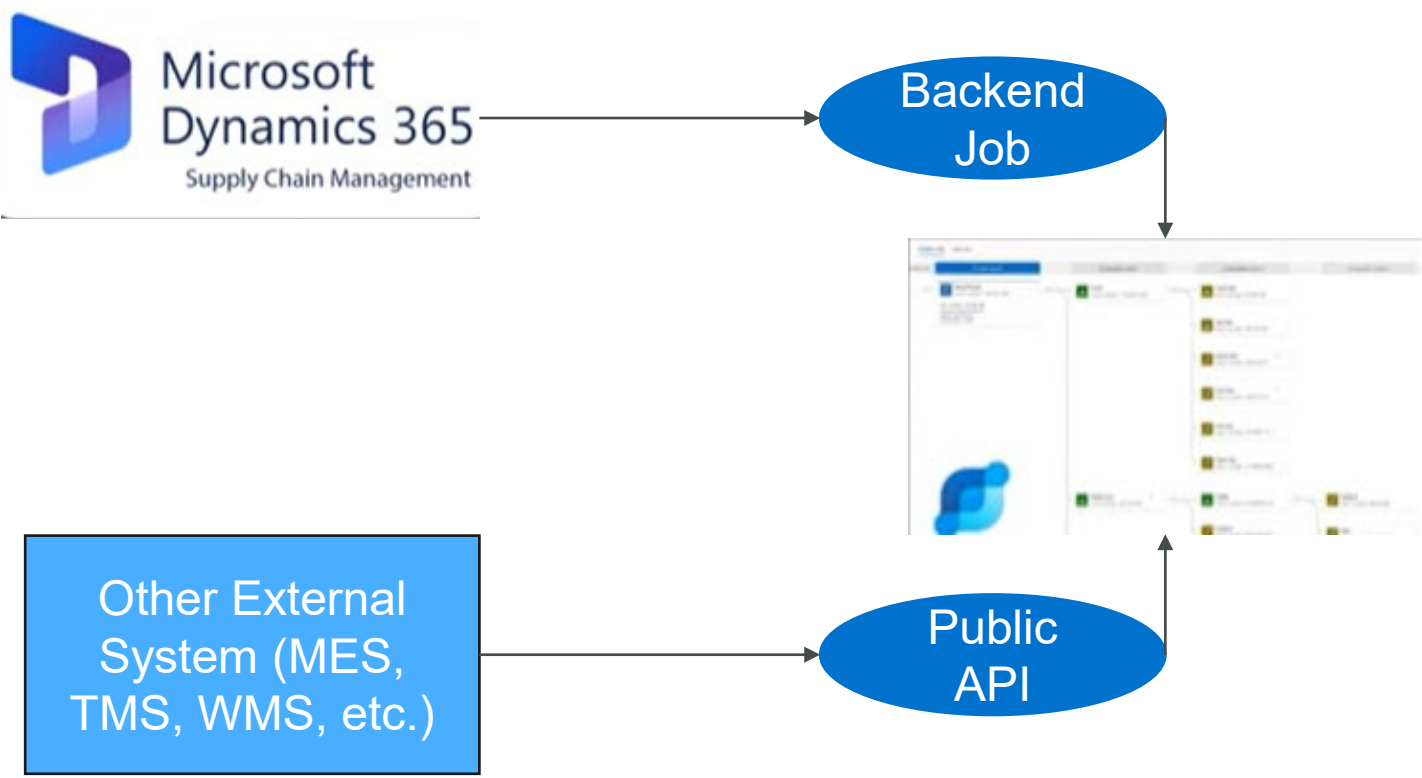
- Custody events
- Product genealogy tracking
- As-built BOM registration

Architectural Considerations

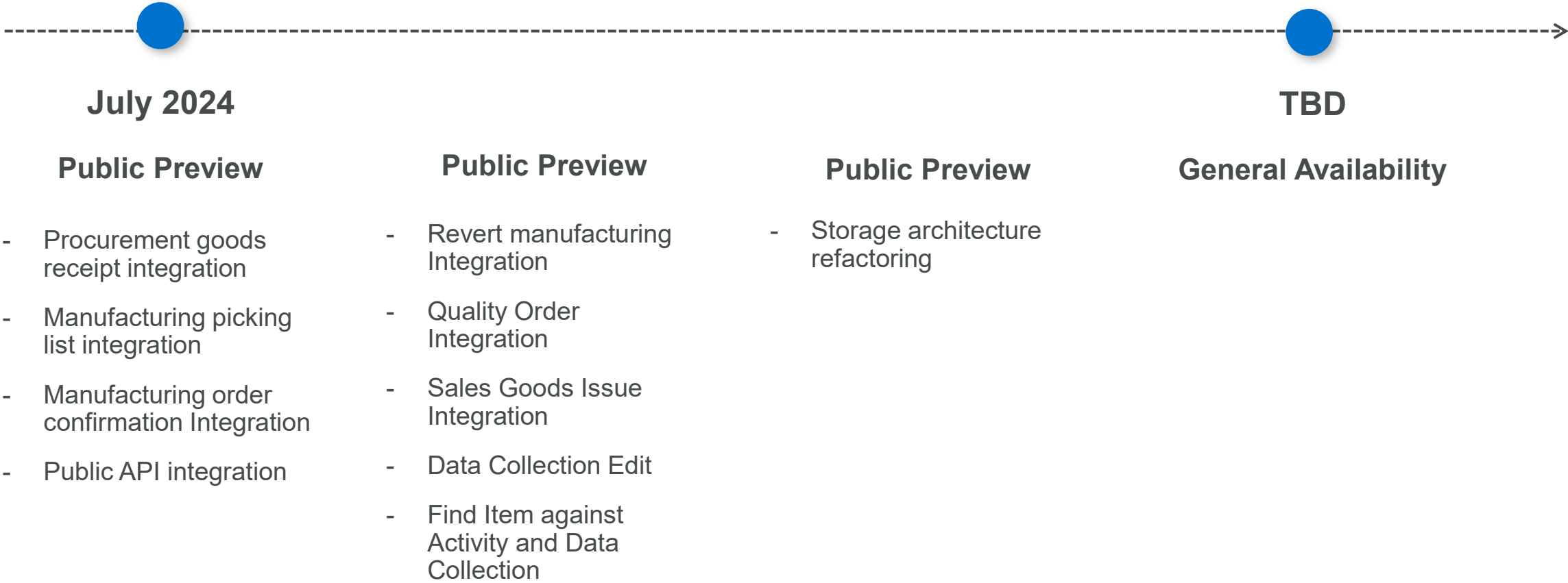
- ERP agnostic
- Out-of-the box connector to D365 Supply Chain Management

Overview of Dynamics 365 Traceability Add-in

ERP Agnostic
Architecture



Traceability Timeline



Traceability vs. Item Tracing

Aspect	Traceability	Item Tracing
Structure & Clarity	Provides a clear, hierarchical genealogy view with event logs for each item.	Offers basic tracing without structured genealogy, often resulting in redundant or fragmented information.
Search Capabilities	Supports cross-order and cross-company search, including forward/backward trace and attribute-based queries.	Limited to order-level search; does not support attribute-based or cross-company queries.
Data Storage	Uses Managed Data Lake for scalable, long-term storage.	Relies on D365 SCM transactional tables, which may be impacted by data archiving.
Integration	Offers public APIs for external system integration, enabling unified track-and-trace across platforms.	No native API support for external integration.
Attribute Search	Enables search against custom attributes and data collections (e.g., quality results).	Does not support attribute-based search.

Demonstration of Traceability Capabilities



Prerequisites:

- D365 version: .40 or later
- Features enabled: Tracked Components (.45 auto enabled) & Traceability
- Install Traceability App in PowerApps
 - App Registration in Azure
 - Install in Power Platform Admin Center
 - Assign Security (system administrator, F&O Basic User)



Configurations:

- Configure Traceability app
 - Activity events
 - Include/Exclude Products
- “Product Component match ID” Number sequence in D365
- Enable “Tracked components for BOMs” in Inventory and warehouse management parameters
- Tracking Policy
- Tracking dimension groups – batch/serial # enabled
- Configure MES
 - Add Action “Tracked Components”



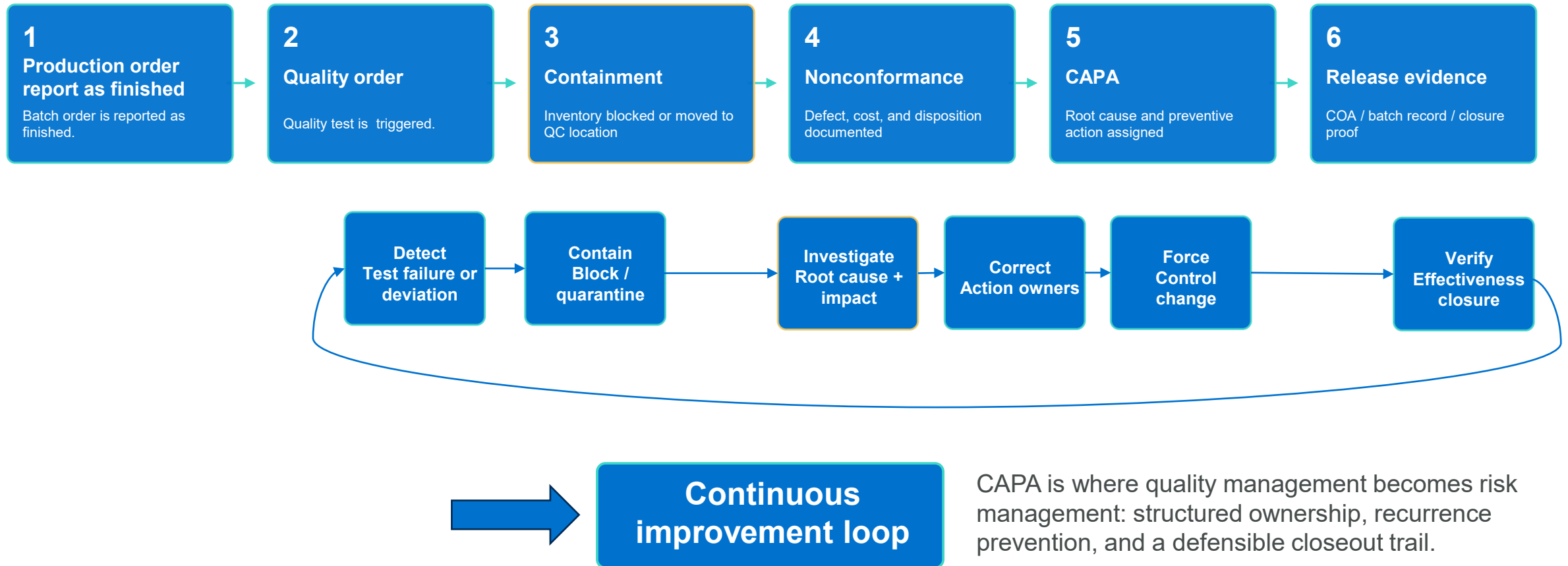
Master Data:

- Released Product
 - Sub Assembly Product
 - Finished Good
 - Components
- Formulas
- Routes
- Resources
- Workers (MES enabled)
- Calendars

Demonstration of Traceability Capabilities

- Purchase Order Receipt
- Production Order (without MES)
 - Picking list journal
 - Report as finished journal
- Quality Order Validation
- Sales Order Packing Slip

Other Traceability Enhancements in D365: CAPA + Electronic Batch Recording



Best Practices & Lessons Learned

- In case of error in setup, revision in “environment configuration table” is needed
- For quality events, 3 records per individual test are required as data collections (not per test group)
- Physical updates only are tracked. And only move forward transactions after enabling the trace (status-quo)
- Performance is not real time (improving)
- Limited access to backend job (per integration architecture)
- Limited custody events status-quo (Production Purchase, Sales, Quality) – per Tech Talks, additional Asset management, Quality, TMS, etc. events on the roadmap

Closing Remarks

Measure traceability as trust created, not just defects found

Audit preparation time

How quickly can we prove the story?

Supplier quality trend

Where should risk controls tighten?

Cost of poor quality

How much waste did we avoid?

Release cycle time

How fast can good product move?

Right-first-time

How much work avoids correction?

CAPA closure + recurrence

Are we preventing repeat issues?

Let's Connect



Christian Segurado
Microsoft MVP - Senior Manager
Business Technology Services
Forvis Mazars



Q and A



Business
Technology
Services

Questions?

Contact

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