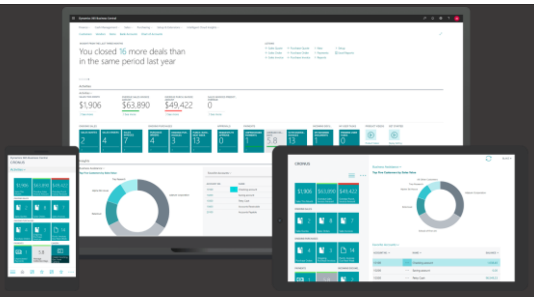
Microsoft Dynamics 365
Business Central

May 2023

Microsoft Dynamics 365 Business Central 2023 RELEASE WAVE 1 ABRIDGED

FEATURES HIGHLIGHTED IN THIS GUIDE



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FEATURES HIGHLIGHTED IN THIS GUIDE

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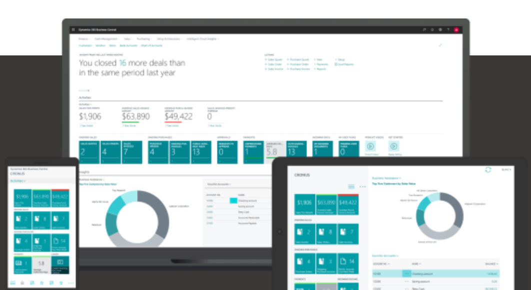
ADDITIONAL FEATURES (USE PROVIDED LINKS)

Feature	Area
[Set default dimensions on locations, inventory documents, and journals]()	Dimensions
[Usability improvements to Financial Reporting pages]()	Financial Reporting
[Use statistical accounts to collect data for financial reports]()	Financial Reporting
[Intercompany posting provides a one-stop-shop setup experience]()	Intercompany
[Navigate easier between warehouse and inventory documents]()	Inventory and Warehouse
[Usability improves for warehouse, inventory, and tracking areas]()	Inventory and Warehouse
[Post multiple transfer orders at the same time]()	Inventory Transfers
[Usability improves for transfer order select multiple items, mandatory fields]()	Inventory Transfers
[Usability improves for item tracking codes: visibility, creation of new entries]()	Item Tracking
[Easier to set up price synchronization for Shopify]()	Shopify
[Shopify connector becomes extensible]()	Shopify
[Usability improves for Shopify Connector]()	Shopify



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REVIEW GENERAL LEDGER ACCOUNTS FASTER

RELEASE NOTES

- You can now mark G/L Entries as “reviewed” indicating the entries are correct and ready for close. This is an Action on the Ledger Entries

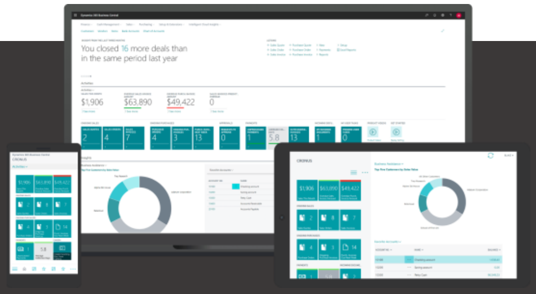
- Marking can be done on a bulk basis in import/export

- To set up account reviews, go to the G/L Account Card page for each account, specify how to allow reviews in the Review Policy field:

  - None: Entries for the account cannot be marked as reviewed

  - Review Allowed: You don't have to include entries in a review, and the amounts of the debit and credit entries don't have to balance. You remove a review, for example, if you've made a mistake.

  - Review Allowed and match balance: The total amounts of the debit and credit entries in the review must match. The Debit and Credit fields show those amounts, and the Balance field shows the total. This setting also lets you remove a review. When you remove a review from one or more entries, the debit and credit entries must still balance.



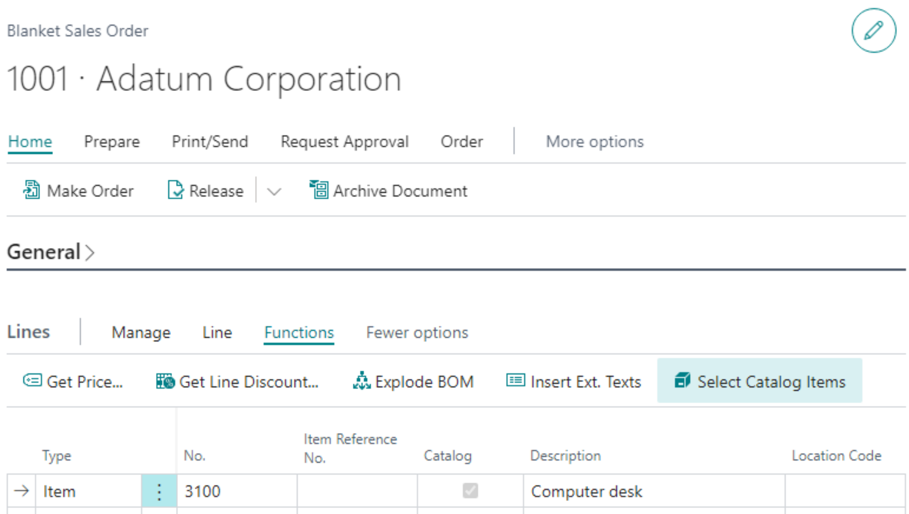
ADD CATALOG ITEMS TO BLANKET SALES ORDERS

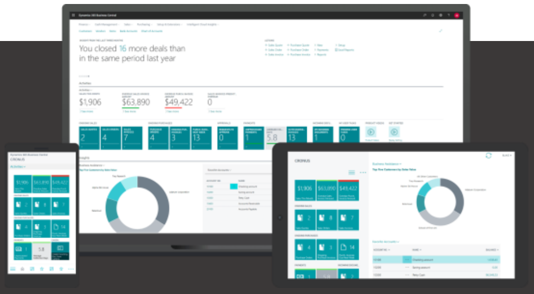
[RELEASE NOTES]

Add catalog item to a blanket sales order and convert it to a normal item

1. On the **Blanket Sales Orders** page, choose the **New** action.
2. On the **General** FastTab, fill in the fields as you would for any blanket sales order.
3. On a new sales line, in the **Type** field, select **Item**, but leave the **No.** field empty.
4. Choose the **Line** action, and then choose the **Select Catalog Items** action.
5. On the **Catalog Items** page, select the catalog item that you want to sell, and then select **OK**.

The catalog item is converted to a normal item. A new item card prefilled with information from the catalog item and a relevant item template is created.





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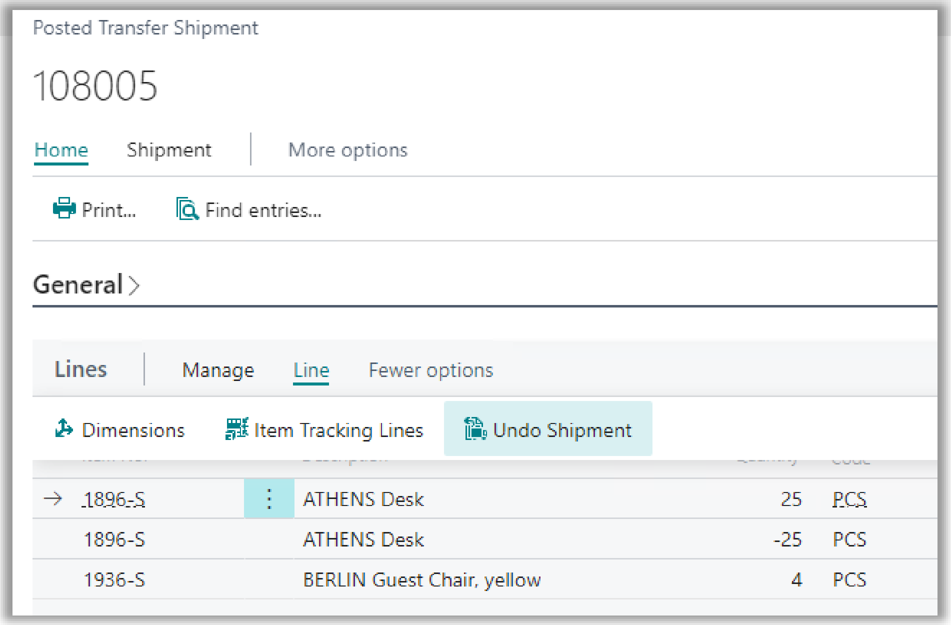
UNDO TRANSFER SHIPMENTS

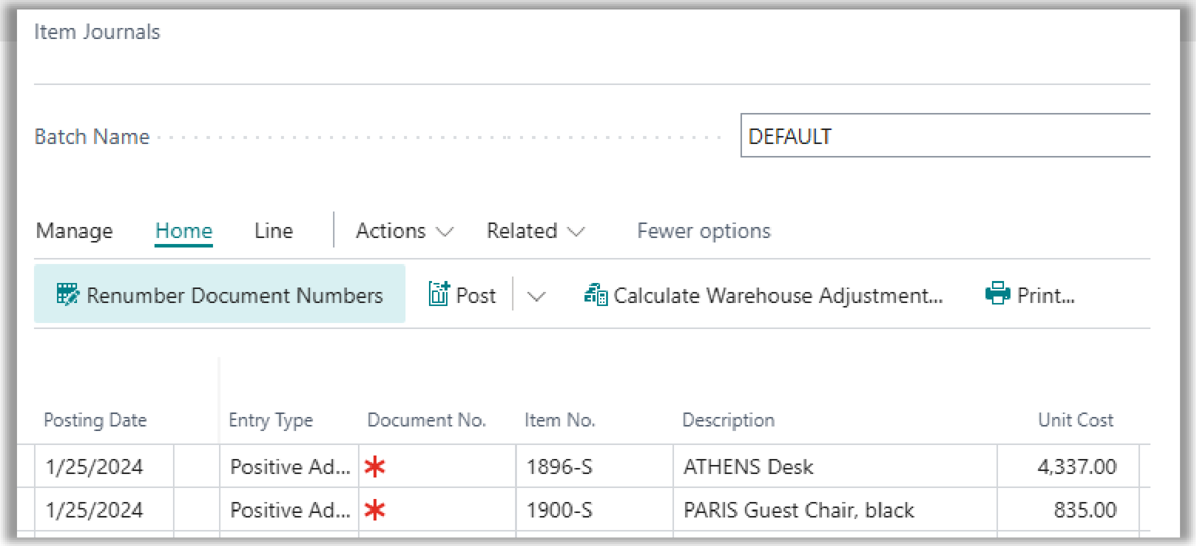
[RELEASE NOTES]



- If there is a mistake in a quantity after a transfer order is posted, as long as the shipment isn't received, a user can now easily correct the quantity. On the Posted Transfer Shipment page, the Undo Shipment action creates corrective lines:
    - The value in the Quantity Shipped field is decreased by the quantity undone.
    - The Qty. to Ship is increased by the quantity undone.
    - The Correction checkbox is selected for the lines.
- If the quantity was shipped in a warehouse shipment, a corrective line is created in the posted warehouse shipment.
- To complete the correction, reopen the transfer order, enter the correct quantity, and then post the order. If you're using a warehouse shipment to ship the order, create and post a new warehouse shipment.

AVOID DOCUMENT NUMBER ERRORS WHEN YOU POST ITEM JOURNALS

[RELEASE NOTES]



- "Renumber Document Numbers" Function added to Item Journals

- If related journal lines were grouped by document number before you used the action, they'll stay grouped but might be assigned a different document number.

- The Renumber Document Numbers action also works on filtered views.

- "If a number series is specified in the No. Series field on the item journal batch, document numbers for individual or grouped lines must be in sequential order when you post an item journal. If they aren't, you can't post the journal. To avoid problems with posting, you can use the Renumber Document Numbers action on the Item Journals page before you post the journal. "

PREVIEW ITEM JOURNALS BEFORE POSTING

[RELEASE NOTES]

Preview Posting has been added to many Inventory related journals:

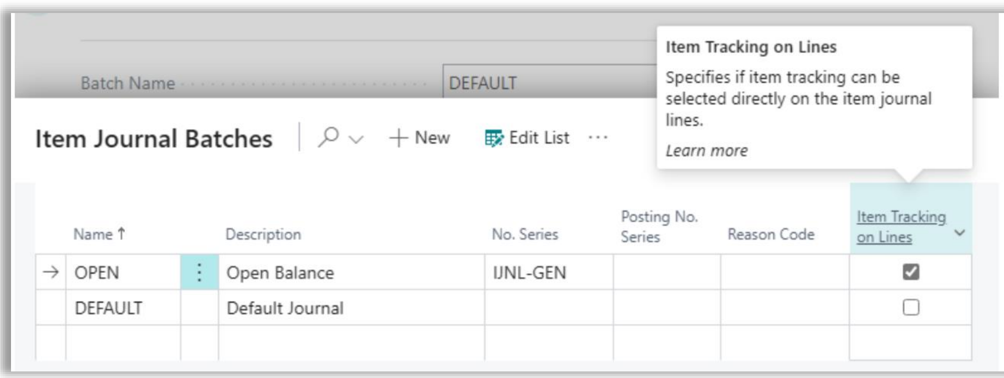
- Warehouse Shipment
- Transfer Order
- Assembly Order
- Production Journal
- Warehouse Receipt
- Item journal
- Inventory Pick
- Capacity Journal
- Recurring Consumption Journal
- Recurring Capacity Journal
- Item Reclass. Journal
- Job Journal
- Phys. Inventory Journal
- Output Journal
- Inventory Put-away
- Consumption Journal
- Physical Inventory Order
- Revaluation Journal
- Invt. Shipment
- Invt. Receipt
- Recurring Job. Journal

EASIER TO CREATE OPENING BALANCES FOR ITEM TRACKED INVENTORY

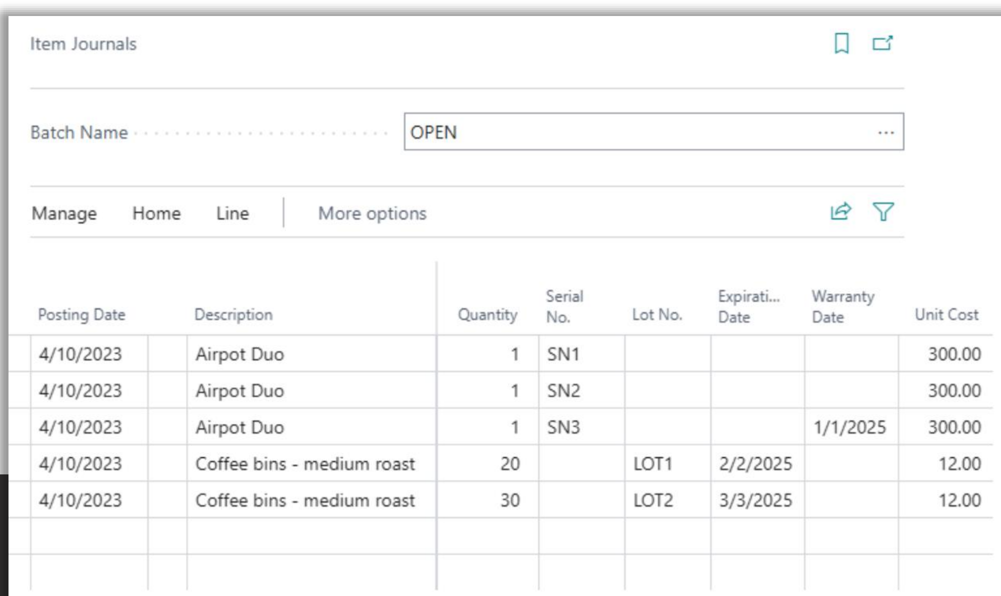
RELEASE NOTES

Two new functions to assist

- Users can enable specific batch es on the Item Journal page to let people enter serial, lot and package data direction on journal lines
- Where **Directed Put-away and Pick** toggle is turned on, you can use the **Warehouse Physical Inventory Journal** page to make all item tracking fields available. The fields that are available now include the **Warranty Date** and **Expiration Date** fields.



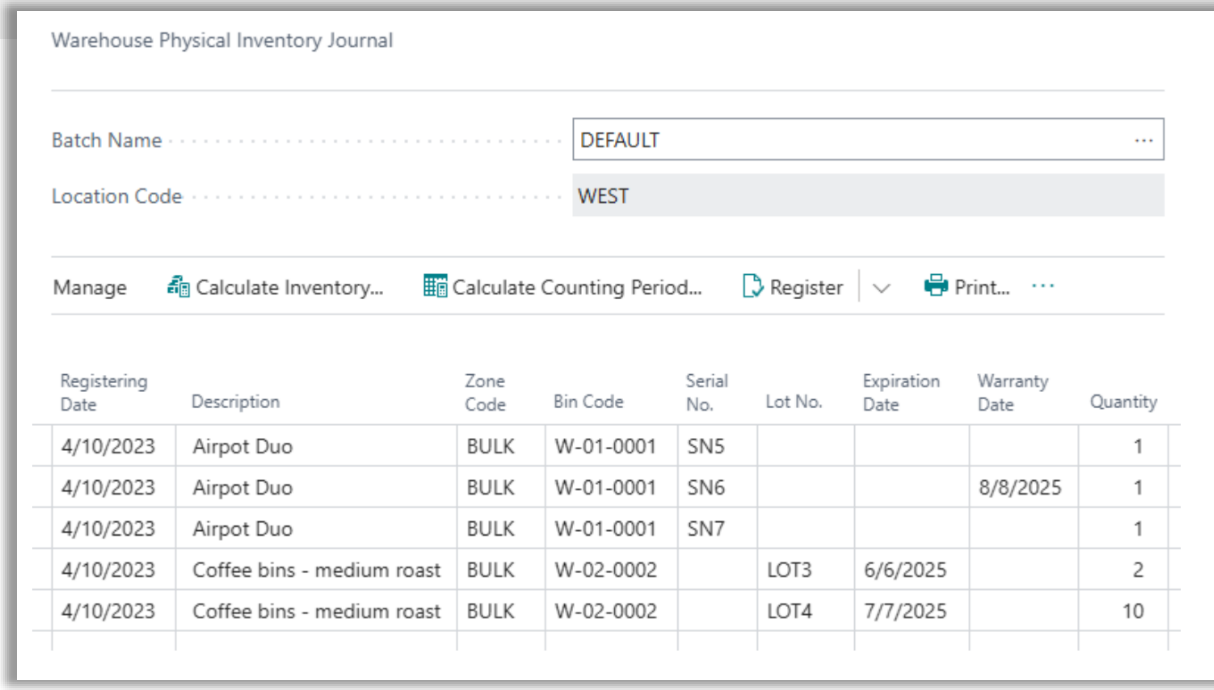
Name	Description	No. Series	Posting No. Series	Reason Code	Item Tracking on Lines
OPEN	Open Balance	IJNL-GEN			☑
DEFAULT	Default Journal				☐



Posting Date	Description	Quantity	Serial No.	Lot No.	Expirati... Date	Warranty Date	Unit Cost
4/10/2023	Airpot Duo	1	SN1				300.00
4/10/2023	Airpot Duo	1	SN2				300.00
4/10/2023	Airpot Duo	1	SN3			1/1/2025	300.00
4/10/2023	Coffee bins - medium roast	20		LOT1	2/2/2025		12.00
4/10/2023	Coffee bins - medium roast	30		LOT2	3/3/2025		12.00

EASIER TO CREATE OPENING BALANCES FOR ITEM TRACKED INVENTORY

RELEASE NOTES


Warehouse Physical Inventory Journal

Batch Name: DEFAULT

Location Code: WEST

Manage | Calculate Inventory... | Calculate Counting Period... | Register | Print...

Registering Date	Description	Zone Code	Bin Code	Serial No.	Lot No.	Expiration Date	Warranty Date	Quantity
4/10/2023	Airpot Duo	BULK	W-01-0001	SN5				1
4/10/2023	Airpot Duo	BULK	W-01-0001	SN6			8/8/2025	1
4/10/2023	Airpot Duo	BULK	W-01-0001	SN7				1
4/10/2023	Coffee bins - medium roast	BULK	W-02-0002		LOT3	6/6/2025		2
4/10/2023	Coffee bins - medium roast	BULK	W-02-0002		LOT4	7/7/2025		10

- Where **Directed Put-away and Pick** toggle is turned on, you can use the **Warehouse Physical Inventory Journal** page to make all item tracking fields available. The fields that are available now include the **Warranty Date** and **Expiration Date** fields.

- Can’t use Edit in Excel on these Journal fields yet

SETUP AND SYNC MASTER DATA ACROSS COMPANIES

[RELEASE NOTES]

- Moving Master Data works when a company “subscribes” to data from another company
- Users define the tables and fields to sync, with capacity to add filters
- Changes in the main company are immediately pulled to the receiving companies by the hob queue
- Users in the receiving company can review synchronization logs.

ADD MORE COLUMNS TO PAGES FOR BETTER INSIGHT

RELEASE NOTES

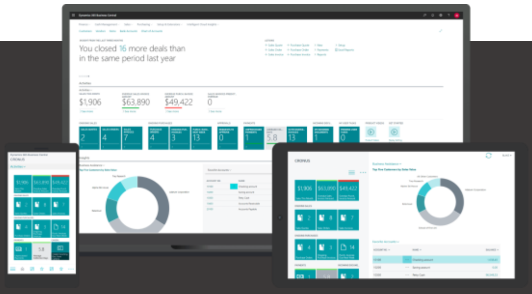
FIELDS	HOW	NOW AVAILABLE HERE
The Gen. Bus. Posting Group Gen. Prod. Posting Group VAT Bus. Posting Group, and VAT Prod. Posting Group fields	can be added by personalizing the Lines FastTab on	Most sales and purchase documents
The Inventory Value Zero field	is available through personalization on these pages	Item Template and Item Card
The Source No. field and the Source Type field	are available through personalization on this page	Item Ledger Entries
The Vendor Order No. field	is available through personalization on this page	Purchase Orders
The Your Reference field	is available through personalization on	Multiple Sales and Purchase documents
The Shipment Date field	is available through personalization on this page	Inventory Picks
The Expected Receipt Date	is available through personalization on this page	Inventory Put-away
The Assigned User ID	is available through personalization on these pages	Inventory Picks, Inventory Put-away, Inventory Movement

BIN CODE AND ZONE CODE FIELDS SHOWN ON WAREHOUSE DOCUMENTS

RELEASE NOTES

When the Bin Mandatory toggle is used for a location, the Bin Code and Zone Code fields are now included on:

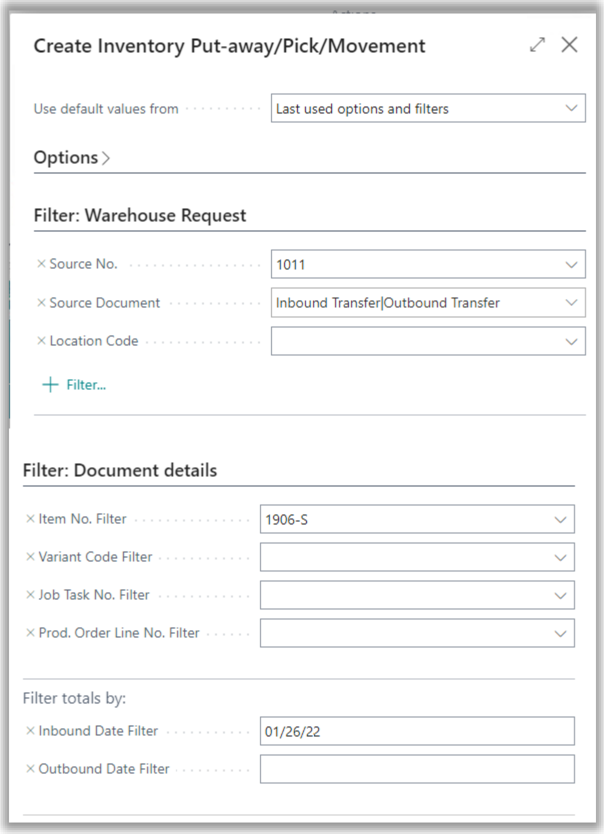
- Warehouse receipt HEADER and LINES
- Warehouse put-away lines
- Warehouse shipment HEADER and LINES



DEFINE CONTENT OF CREATED WAREHOUSE DOCUMENTS WITH FILTERS

[RELEASE NOTES]

Inventory Picks, Put-away and Movements can be Filtered more precisely, as to direct the warehousing team more efficiently. Additional fields include:



- Purchase orders and purchase return orders: The Planned Receipt Date of the purchase line.
- Sales orders and sales return orders: The Shipment Date of the sales line.
- Job usage: The Planning Date of the job planning line.
- Outbound transfer orders: The Shipment Date of the transfer line.
- Inbound transfer orders: The Receipt Date of the transfer line.
- Production output: The Due Date of the production order line.
- Production consumption: The Due Date of the production order component line.
- Assembly consumption: The Due Date of the assembly line.

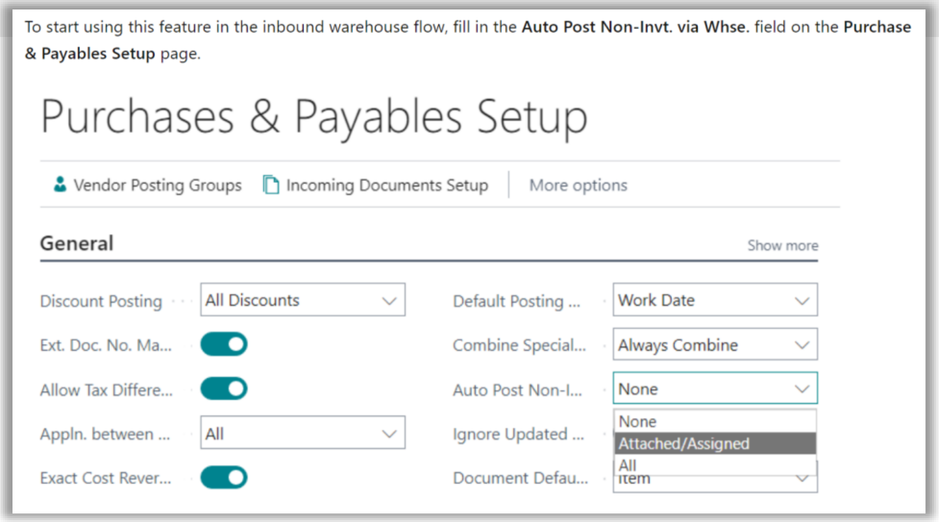
SHIP AND RECEIVE NON-INVENTORY ITEMS ON WAREHOUSE DOCUMENTS

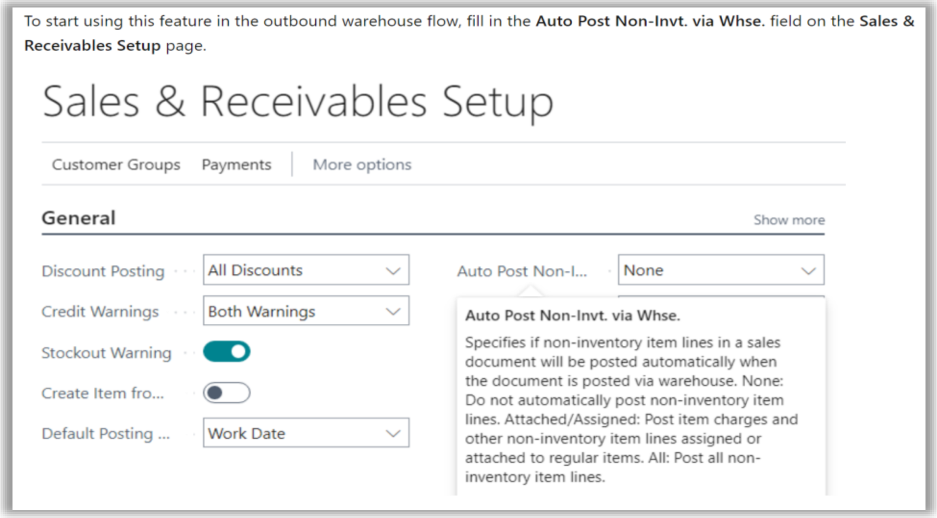
RELEASE NOTES

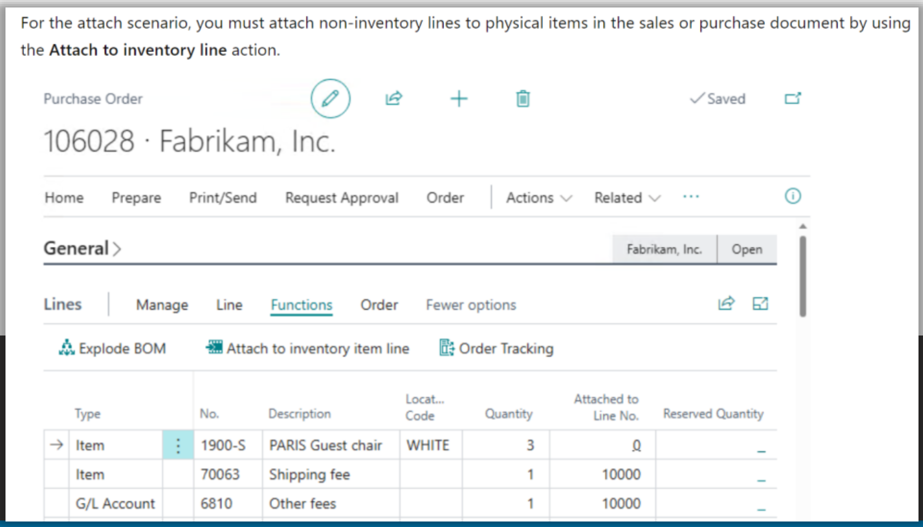
- Two new functions to assist in the allocation of warehouse activities to the warehouse workers
    - Post all non-inventory lines on the source documents as soon as at least one item is posted by the warehouse document
    - Post non-inventory lines of the source document linked to the item through the Attached to Line No. Field when the item is posted by the warehouse document
- Note: Shipping advice "Complete" takes priority over this feature
- Next slide will show the configuration of this feature

SHIP AND RECEIVE NON-INVENTORY ITEMS ON WAREHOUSE DOCUMENTS, CONT.

RELEASE NOTES







USE ADVANCED WAREHOUSE FUNCTIONALITY WITH MINIMAL COMPLEXITY

RELEASE NOTES

You no longer need to use Directed Pick and Puts in order to use the following:

- Zones
- Movement worksheet
- Calculate Bin Replenishment task
- Bin Capacity Policy
- Warehouse class check
- Special equipment in warehouse documents

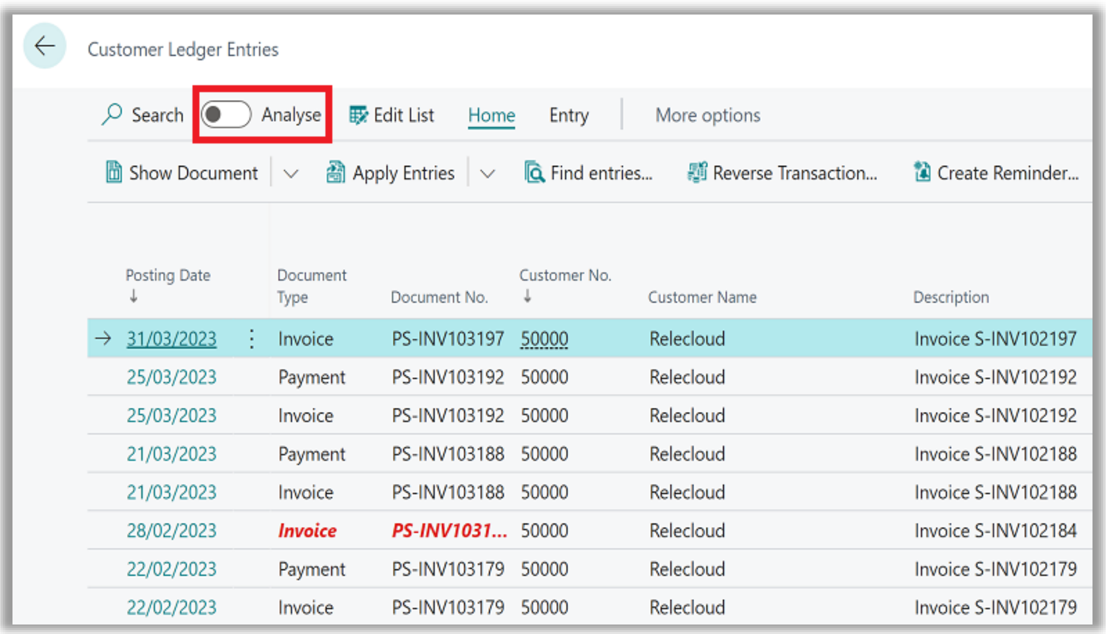
This is big for flexibility!

ANALYZE, GROUP, AND PIVIOT DATA ON LIST PAGES USING MULTIPLE TABS

RELEASE NOTES

You can now analyze data from LIST PAGES in BC! No need to open the page in Excel or run a report.

- Known as Analysis Mode
- Add multiple tabs that represent different tasks or views on the data e.g.: My Customers, Follow Up Items, Recently Added Vendors
- When ready to analyze data on a list page, instead of filtering data using a view or filter pane, switch to the analysis mode:

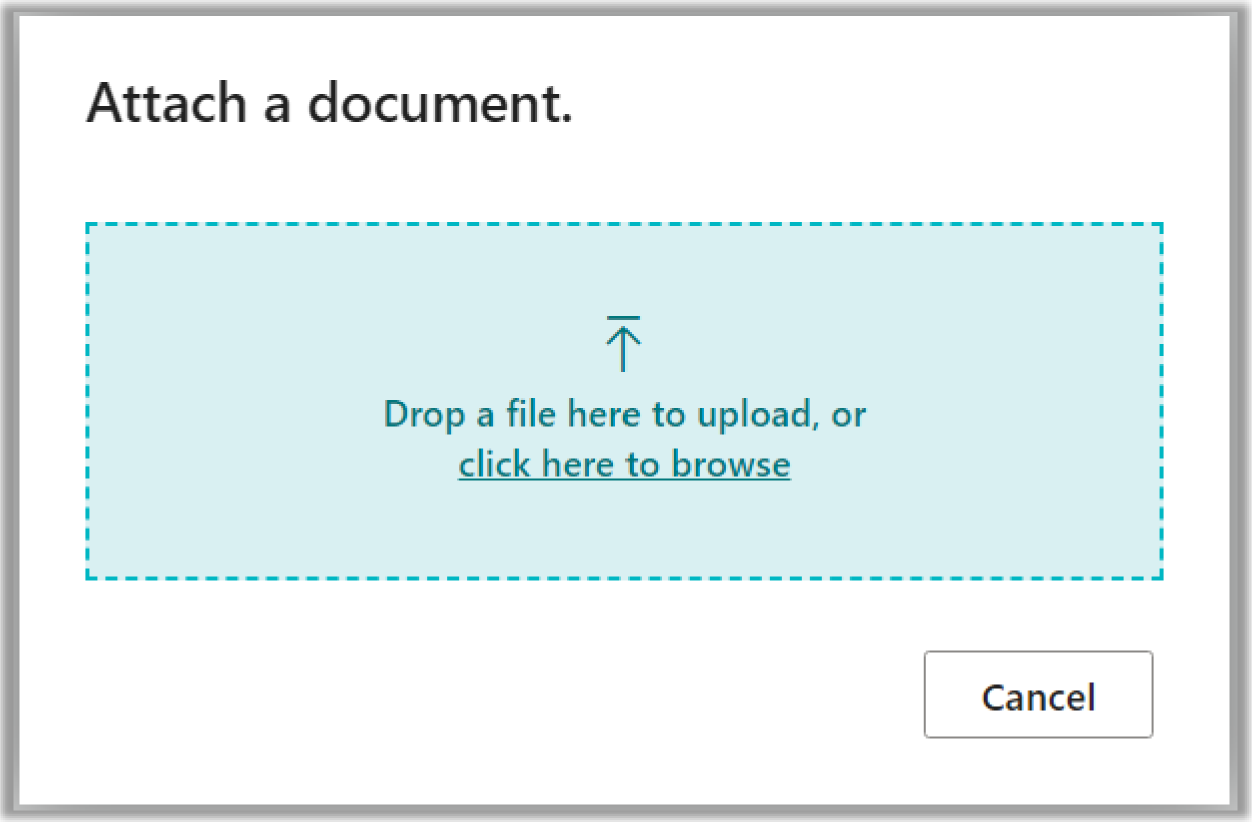


See full instructions on the Microsoft site by clicking on the Release Notes link at the top of this page.

DRAG AND DROP FILES ONTO THE FILE UPLOAD DIALOG

[RELEASE NOTES]

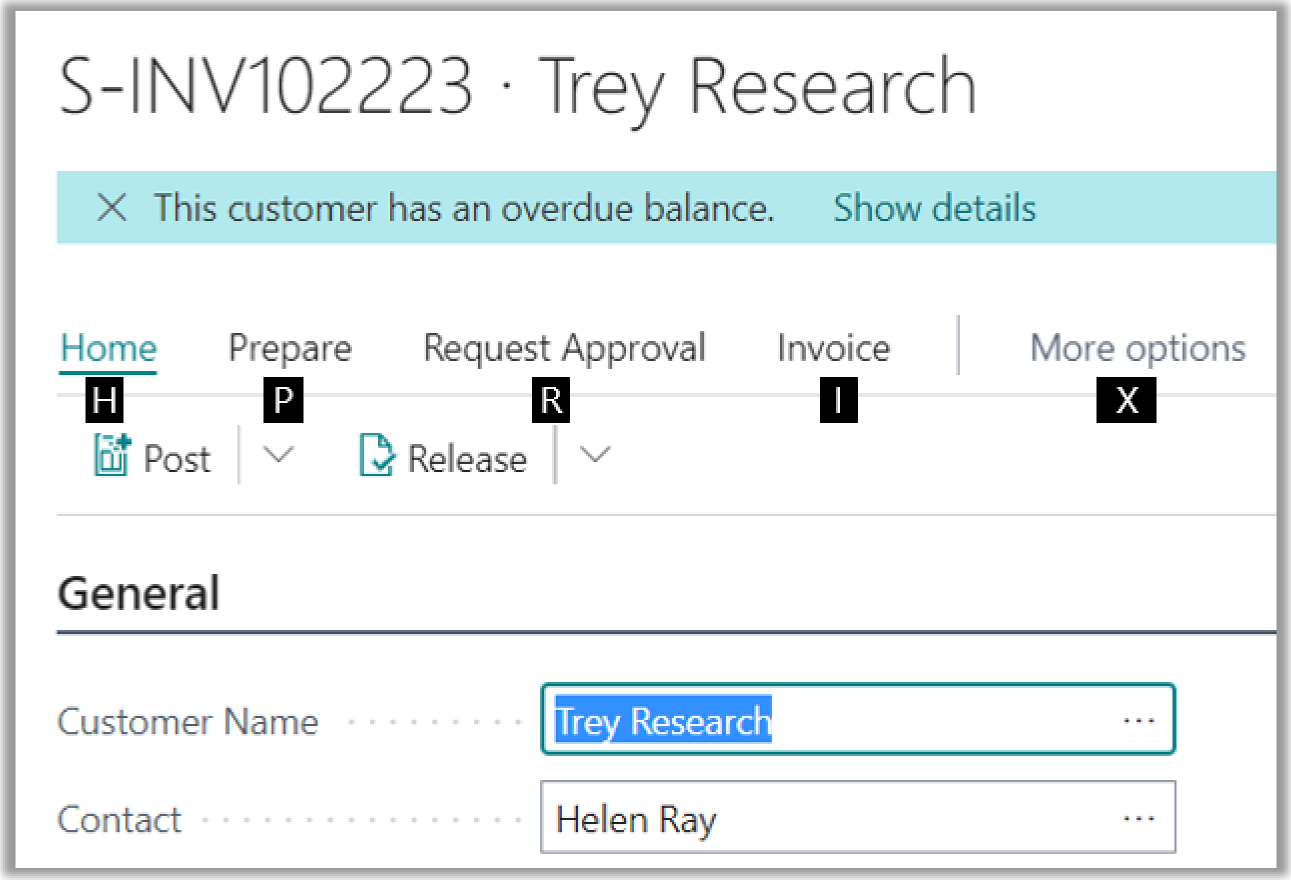
- Choose between the traditional file picker or dragging a file for upload
- New Drop area:



NEW KEYBOARD SHORTCUT KEYS: ALT+

[RELEASE NOTES]

Additional keyboard shortcut keys have been added.

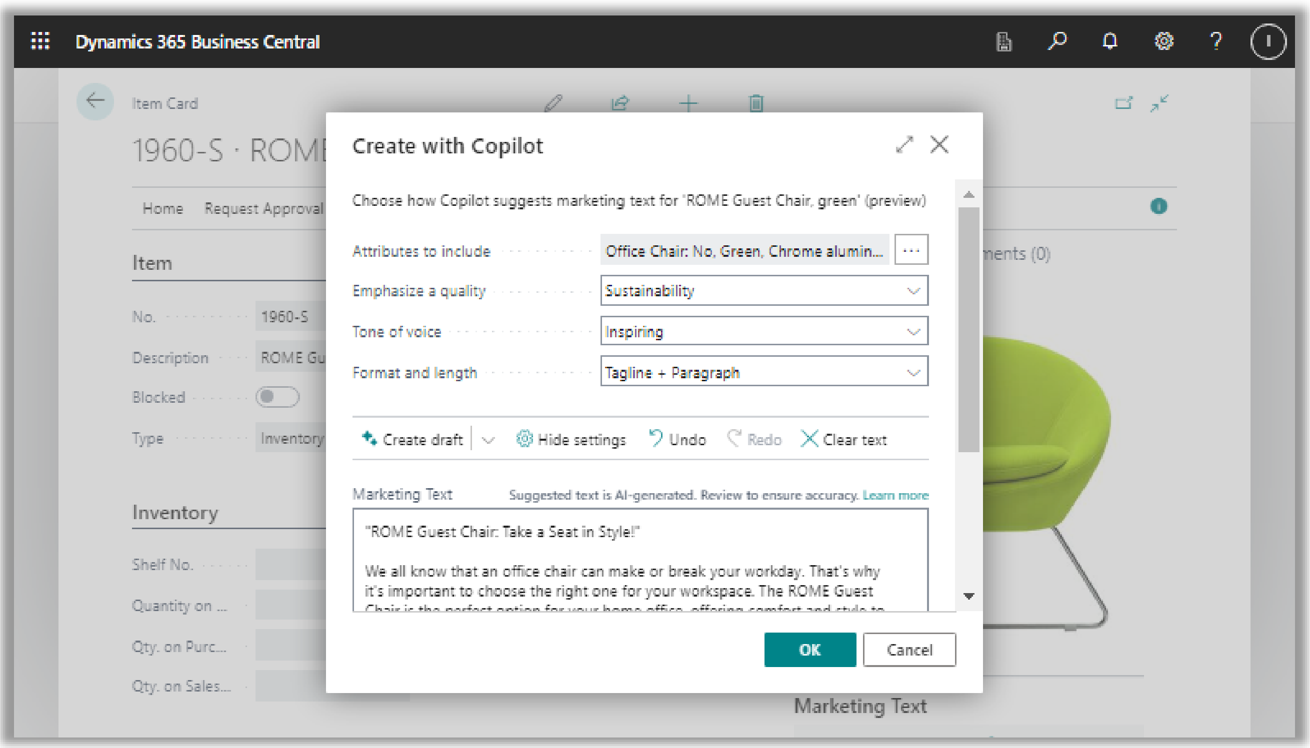


DRIVE SALES WITH AI-GENERATED PRODUCT DESCRIPTIONS

[RELEASE NOTES]

Start with a picture and use AI to generate product descriptions!

- Start with a picture: BC analyzes the image and suggests content
- Author marketing copy: in the new Marketing text area
- Get AI-powered suggestions using Azure OpenAI and GPT technology
- Customize suggestions using the Create with Copilot window
- Publish to Shopify



[Watch this 2-minute video from Microsoft!]