BC Breakout Session

June 18, 2026

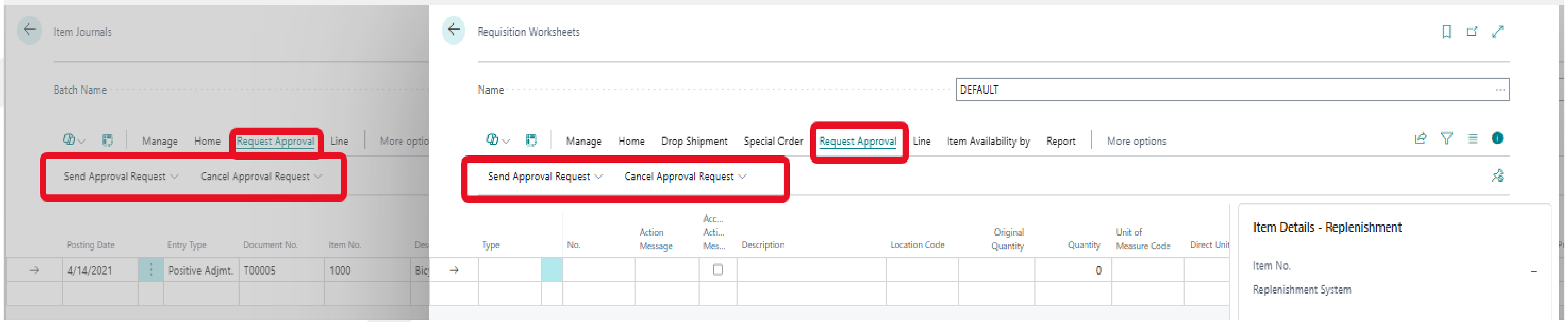
Overview

- Item Journal/Requisition and Planner Worksheet Approvals
- Agent Overview
  - Payables Agent
  - Sales Agent
  - Custom Agents (create your own agent)
- Expense Management
  - Expense Agent (Oct release)
  - Multicurrency
  - Expense Dimensions
  - Project #
  - Withholding Tax
- Enhanced Reporting
- Analysis Mode
- 3rd party Products to Consider

Item Journal/ requisition and planning worksheets Approvals

Workflow approvals have been added to the following transactions in business central in V28:

Item Journal	✅ New in BC 28
Physical Inventory Journal	✅ New in BC 28
Output Journal	✅ New in BC 28
Consumption Journal	✅ New in BC 28
Requisition Worksheet	✅ New in BC 28
Planning Worksheet	✅ New in BC 28



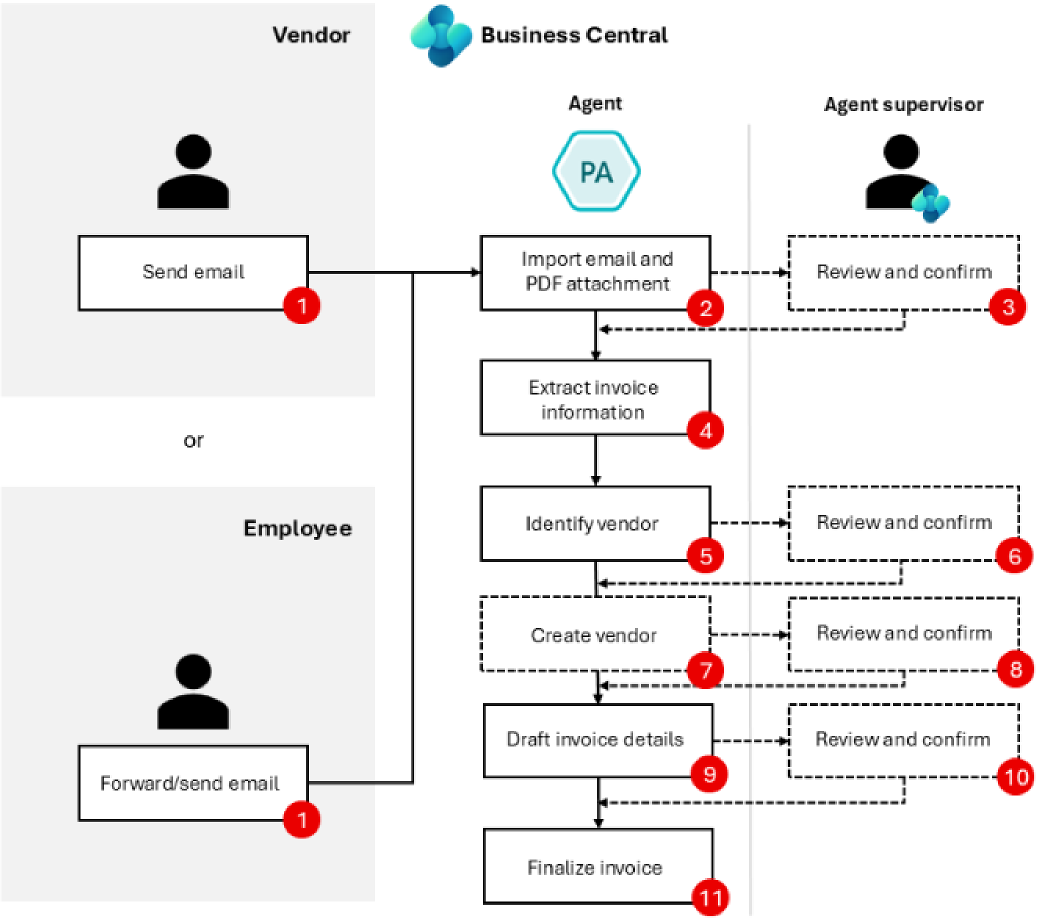
Summary of BC Journals that have Workflow Approvals

Payables Agent Overview

- Goal of the agent is to create **end-to-end processing of vendor invoices**

Main Functions

- Monitor mailboxes
- Use AI to analyze invoice content
- Prepare invoices that are ready for approval and posting in BC



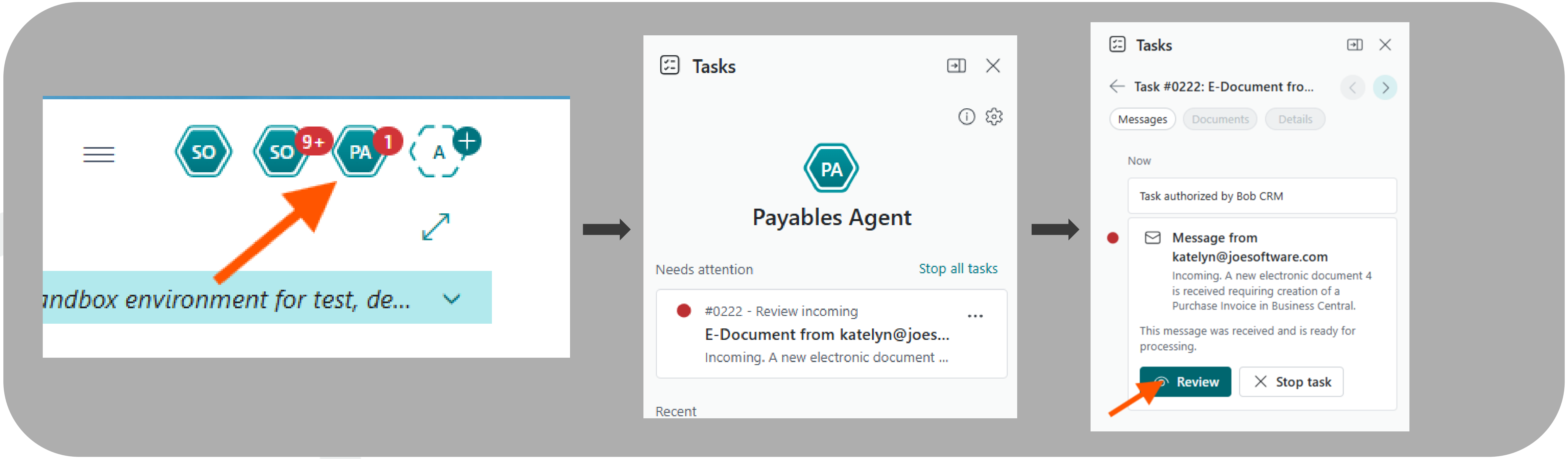
Activate the Agent

Requirements

- Email account for receiving vendor invoice PDF documents
- BC environment set up for billing agent capabilities

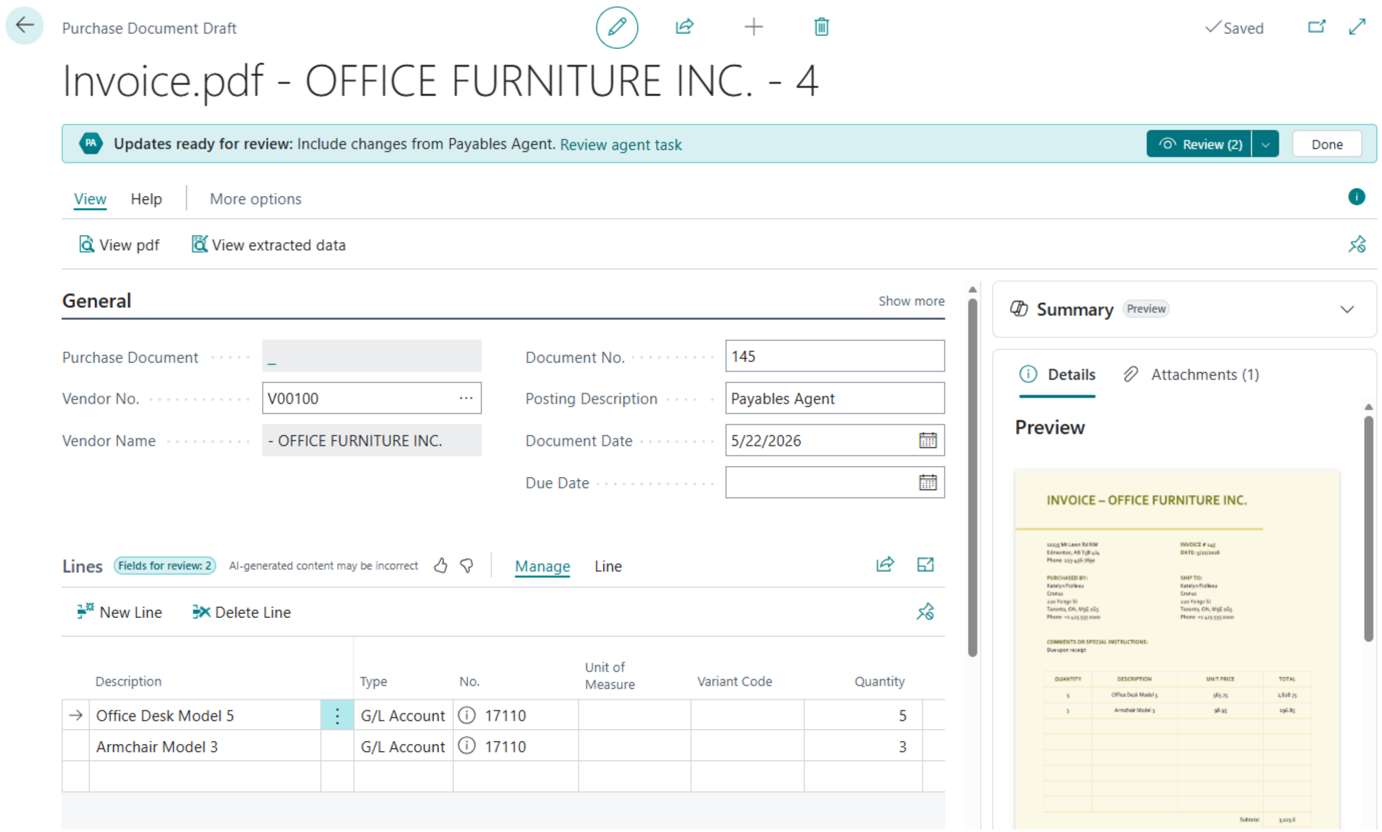
Receiving an invoice

When an invoice is detected in the mailbox, you will be notified in Business Central



Review

At every step where the agent is analyzing information, there is optional confirmation of the steps, and give it further instruction



JoE software
Works for people

Sales Agent

BC's first out-of-the-box autonomous agent — monitors your shared mailbox and turns customer emails into approved sales orders with zero manual entry.

Email Received → Customer Identified → Stock Verified → Quote Sent → Order Confirmed

Email Monitoring

Links to a shared Microsoft 365 mailbox. AI filters spam from real orders. Multi-turn conversations clarify missing details — PO number, delivery date, item quantities — before creating any record.

Human-in-the-Loop Control

Every agent action surfaces in the Copilot pane for review. Users can edit, approve, or discard any step. Full audit trail logged in BC. Agent operates only within its pre-assigned permission set.

Quote → Order Automation

Auto-identifies the customer in BC, checks live inventory, generates a PDF sales quote, emails it for customer approval, then converts confirmed quotes directly into sales orders upon reply.

Setup & Configuration

Activate from Copilot & Agent Capabilities page. Agent wizard links to your M365 mailbox in minutes. Pre-defined roles limit access to only necessary BC areas. Disable/enable without code changes.

BC 2025 WAVE 1 • AUTONOMOUS AGENT

Sales Order Agent- What You Need

Three layers of licensing work together to unlock full agent capabilities in Business Central.

Dynamics 365 Business Central Licence (Essentials or Premium)

REQUIRED — INCLUDED

- Core Copilot features included at no extra cost with any BC licence
- Sales Order Agent access is bundled — no separate AI licence needed
- Essentials covers sales, purchasing, finance & supply chain
- Premium adds manufacturing, service management & advanced warehouse

Copilot Credits (Pay-as-You-Go)

REQUIRED — CONSUMPTION BILLING

- Autonomous agent tasks (email reading, quote creation) consume Copilot Credits
- Credits are billed per task complexity — simple reads cost fewer credits
- M365 Copilot licence includes 25,000 credits per user/month
- BC-only tenants: set up consumption billing in the BC Admin Center

Microsoft 365 Copilot (Add-on)

OPTIONAL — ENHANCES EXPERIENCE

- Brings Copilot into Teams, Outlook, Word, Excel alongside BC
- Enables conversational BC interactions from within M365 apps
- Required for the full M365 + BC integrated agent stack
- Includes 25,000 Copilot Credits — covers most agent workloads

Region Note: Sales Order Agent is production-ready in US, CA, UK, AU & NZ (BC v26+). Requires BC Online (SaaS) — on-premises deployments are not supported. Additional regions follow with CU releases.

Custom Agents – What's Possible?

BC 2026 WAVE 1 • PRODUCTION PREVIEW

Build agents tailored to your exact workflows using plain-language instructions — no code required. Deploy inside BC or via Copilot Studio.

How You Build Custom Agents

01 **In-BC Agent Wizard**

Select Agent > Create from the role center. Choose 'Blank Agent' or a 'Sales Validation' template. The wizard configures identity, scope and permissions.

02 **Natural Language Instructions**

Describe the agent's purpose in plain text. Define what pages it can access, what actions it can take, and when to escalate to a human.

03 **Copilot Studio (Advanced)**

For complex multi-step workflows, use Copilot Studio. Connect via the BC MCP Server or Power Platform Connector for full read/write record access.

04 **Test, Activate & Deploy**

Run in a sandbox (BC v27.2+). Review the task log. Once validated, activate for production and share with Teams, Outlook, or M365 Copilot Chat.

What You Can Build

Payables / AP Agent
Reads vendor invoices, matches to POs, suggests posting accounts, routes for approval.

Customer Service Agent
Answers order status, stock & account queries via Teams or Outlook in natural language.

Reporting & Analytics Agent
Generates ad-hoc financial summaries, KPI snapshots, and trend reports on demand.

Inventory Reorder Agent
Monitors reorder thresholds and auto-creates purchase orders when stock drops below min.

Data Quality Agent
Scans records for missing fields, duplicate entries, or invalid values before posting.

Agents meet users where they work: Teams, Outlook & M365 Copilot Chat — eliminating app-switching and accelerating every process.

Expense Management

BC 2026 WAVE 1 (BC28) • NEW NATIVE MODULE

Native end-to-end expense reports — no third-party tools needed. Public Preview: May 2026 (US/UK) → General Availability: October 2026.

Expense Agent (AI)

AI agent monitors a shared mailbox, reads receipt emails, and auto-creates expense records. Integrates with Outlook, Teams & M365 Copilot Chat. Detects anomalies, duplicates, and enforces policy rules automatically. Approvals are configurable.

Multi-Currency

Submit expenses in any foreign currency. FX rate applied at either the expense date or posting date (set in Expense Agent Setup). BC auto-converts to functional currency using the live Exchange Rate table. FX gain/loss posted to dedicated GL accounts.

Expense Dimensions

Assign Global Dimensions (e.g. Department, Cost Centre) per expense line via the Dimensions FastTab. Additional custom dimensions available through the Dimensions action. Drives precise GL posting and segment/cost-centre reporting.

Project Billing

Link each expense to an existing BC Project No. Costs post directly to the project's WIP ledger. Bill expenses to the client using standard BC Project Invoicing. Supports Time & Material and Fixed Price contract types with full traceability.

Withholding Tax

BC 2026 W1 adds native WHT calculation for vendor payments. Assign a WHT code to the Vendor Card. On payment, BC retains the configured percentage, posts the liability to a dedicated GL account, and nets the payment — full compliance, zero manual calc.

Expense Management – How it Works?

Create Expense → Set Currency & FX Rate → Add Dimensions & Project → Build Expense Report → Approve & Post → Reimburse Employee

Configuring Expense Dimensions

- Enable Global Dimensions 1 & 2 in General Ledger Setup (e.g. Department, Cost Centre)
- Open any Expense card → Dimensions FastTab → assign dimension values per line
- Additional dimensions: use the Dimensions action button on the Expense card
- Mandatory dimension rules enforced via Dimension Sets in BC setup
- Dimension values flow automatically into posted GL entries for accurate segment reporting

Multi-Currency Expense Handling

- Employee selects foreign currency (e.g. USD, EUR) directly on the Expense card
- Expense Agent Setup: choose 'Expense Date' or 'Posting Date' for exchange rate
- BC retrieves the rate from the Currency Exchange Rate table automatically
- Reimbursement calculated & paid in employee's home (functional) currency
- FX gain/loss differences posted to dedicated GL accounts on payment

Project Billing & Tracking

- On each Expense card: select Project No. from existing BC Projects list
- Individual expense lines can be linked to specific Project Tasks
- Costs post to the project's WIP (Work-in-Progress) ledger automatically
- Bill to client using standard BC Project Invoicing — no manual journal needed
- Full traceability chain: Expense → Project Task → WIP → Customer Invoice

Withholding Tax (BC 2026 W1)

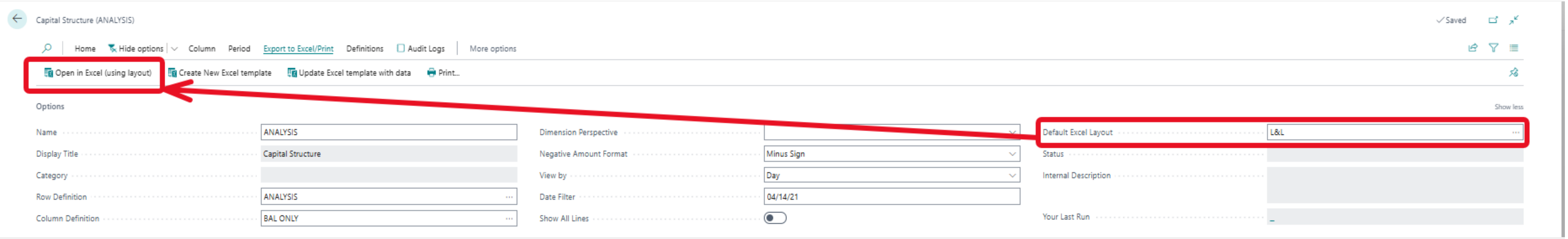
- Navigate to Vendor Card → assign a Withholding Tax Code (rate + GL account)
- WHT codes configured in the Withholding Tax setup page (rate %, threshold, type)
- On payment posting, BC auto-calculates and retains the WHT percentage
- Net amount paid to vendor; WHT liability posted to dedicated payables account
- Reduces manual compliance effort, remittance errors, and audit risk

Enhanced Reporting

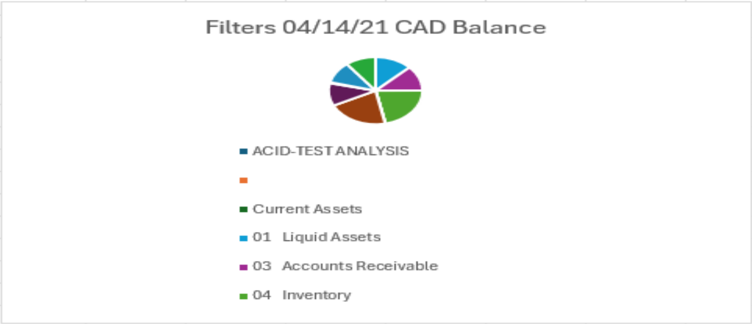
- Excel Layouts on financial reports where you can have visuals
- Excel Trial Balance
- Report Layout Status

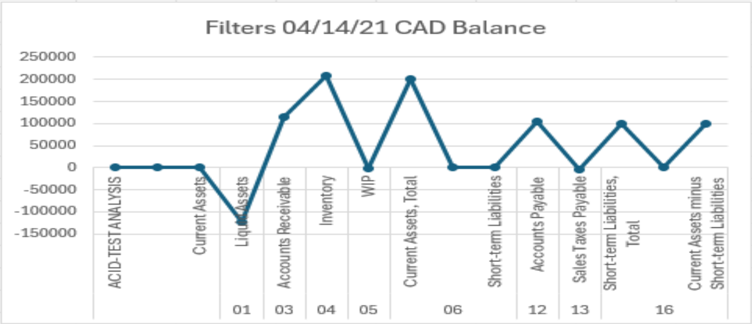
Excel Layouts on Financial Reports

- Can set a default excel layout for Financial Reports where you can add formatting and charts to the layout



	A	B	C
1	Filters		
2	Date Filter	04/14/21	
3			
4	Currency	CAD	
5			
6			Balance
7		**ACID-TEST ANALYSIS**	
8			
9		**Current Assets**	
10	01	Liquid Assets	-122897
11	03	Accounts Receivable	115662.2
12	04	Inventory	208061
13	05	WIP	-750
14	**06**	**Current Assets, Total**	**200075.7**
15			
16		**Short-term Liabilities**	
17	12	Accounts Payable	104868.4
18	13	Sales Taxes Payable	-4724.71
19	**16**	**Short-term Liabilities, Total**	**100143.6**
20			
21		**Current Assets minus Short-term Liabilities**	**99932.07**
22			





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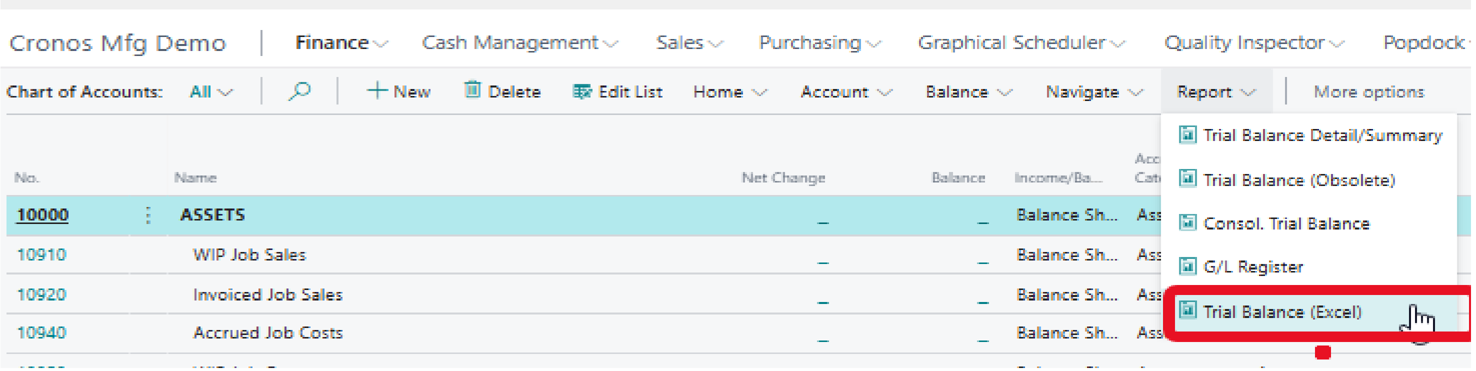
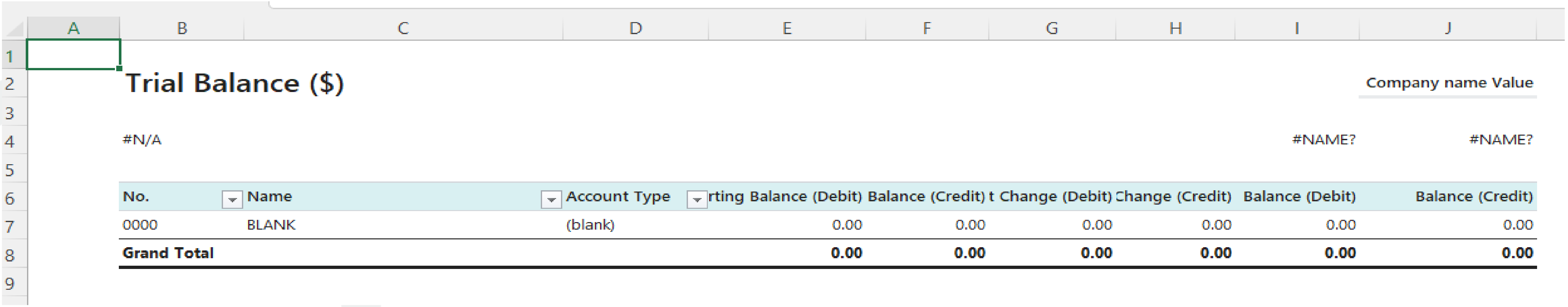
Excel Trial Balance

- Trial Balance was replaced with a new excel version in V28

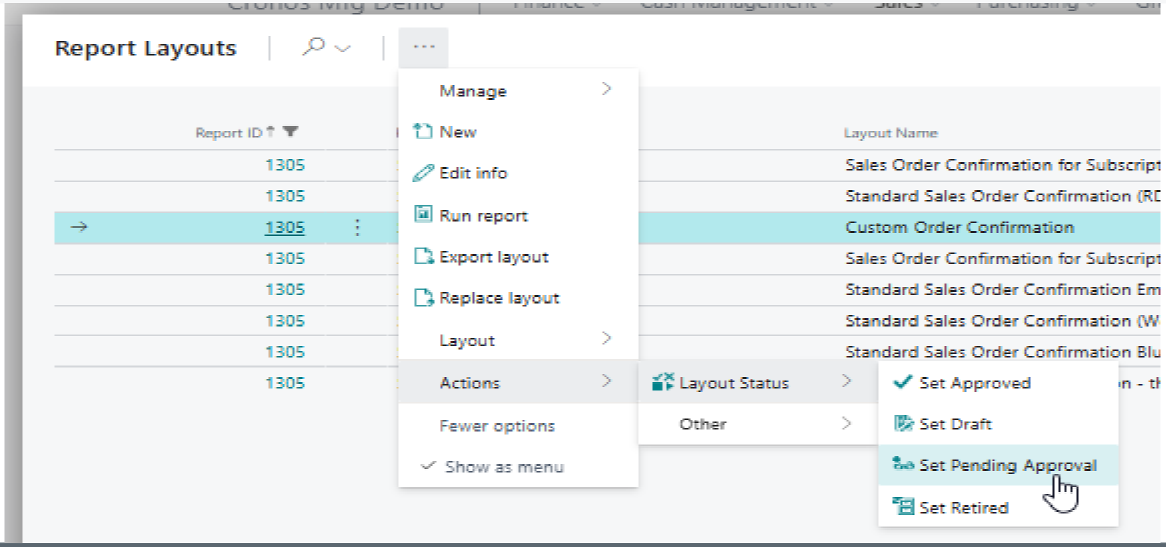




Report Layout Status

Report Layouts

Report ID	Report Name	Layout Name	Description	Default	Extension	Type	Obsolete	Layout Status	Excel Sheets	Last Modified Date	Last Modified By
1305	Sales - Confirmation	Sales Order Confirmation for Subscription Billing (R...	The Sales Order Confirmation for Subscription Billin...		Subscription Billing by Microsoft	RDLC		Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation (RDLC)	Detailed layout with all fields.		Base Application by Microsoft	RDLC		Approved	Default		
1305	Sales - Confirmation	Custom Order Confirmation	Custom Order Confirmation			Word		Draft	Default	6/12/2026 1:38 PM	COURTNEY
1305	Sales - Confirmation	Sales Order Confirmation for Subscription Billing (...	The Sales Order Confirmation for Subscription Billin...		Subscription Billing by Microsoft	Word		Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation Email (Word)	Layout intended for an email body.		Base Application by Microsoft	Word		Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation (Word)	Simple layout with most necessary fields.	✓	Base Application by Microsoft	Word		Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation Blue (Word)	Simple layout with most necessary fields with a blu...		Base Application by Microsoft	Word		Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation - themable Wor...	Simple themable layout with most necessary fields.		Base Application by Microsoft	Word		Approved	Default		



What is Analysis Mode & Why It Matters

A built-in workspace that lets you group, filter, sum and pivot data right on a list page — no Excel export, no custom report.

?

What it is

An interactive workspace inside Business Central, available on almost every list page.

- Group, filter and sum live data
- Multiple saved analysis tabs
- Standard since 2023 Wave 2 (v23)

!

Why it matters

Answers business questions in seconds — without exporting to Excel or asking IT for a report.

- Real-time data, never stale
- Reusable saved views
- Zero cost, zero install

@

Who benefits

Anyone who reads BC data and wants quick answers.

- Finance & accounting teams
- Sales, purchasing, operations
- Consultants and power users
- Anyone comfortable with Excel

Key Capabilities, Pivot Mode & Tabs

Key capabilities

G **Group & summarize**

Drag fields into Row Groups for an instant subtotalled hierarchy.

F **Filter & focus**

Analysis Filters narrow rows; multi-select cells gives instant totals.

C **Reshape columns**

Show, hide, and reorder columns; sort any column ascending or descending.

E **Export when needed**

Right-click to export the current view to Excel for further work.

Pivot Mode

Turn on the Pivot Mode toggle to add a third area, Column Labels, for a true two-dimensional pivot.

Row Groups → rows down the side

Column Labels → categories across the top

Values → sums at each intersection

Tip: only use low-cardinality fields in Column Labels (e.g. month, region).

Working with multiple tabs

Each tab is a saved, independent analysis view — build once, reuse forever.

- Different columns, filters and pivots per tab
- Add, rename, duplicate, delete with the + and arrow
- Tabs are personal — only you see your tabs

Limitations & Best Practices

Know the limits

- No charts or graphs — tables only
- Not on every page (e.g. Chart of Accounts)
- Tuned for ~100,000 rows; large-dataset mode beyond that
- Cannot pull arbitrary unrelated tables or complex calc fields
- High-cardinality fields in Column Labels can crash the tab

Best practices

- Filter before entering analysis mode to keep data manageable
- Clear all columns first, then add only what you need
- Keep Column Labels to low-value fields (month, region…)
- Name every tab and add a short description
- Use Analysis Assist (Copilot) for a fast first draft

Live data, no exports, no reports — insight where you already work.

Joe software
Works for people

3rd Party Products to Consider

continia

Zetadocs

Jet Reports
reporting
from insightsoftware

RUX
RUX Service
RUX Rentals

BUSINESS CENTRAL TOOLBOX
Powered by RUX

solver

INSIGHT WORKS

Vivid REPORTS

nolan
business applications

Avalara

MEKORMA

Questions?

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