



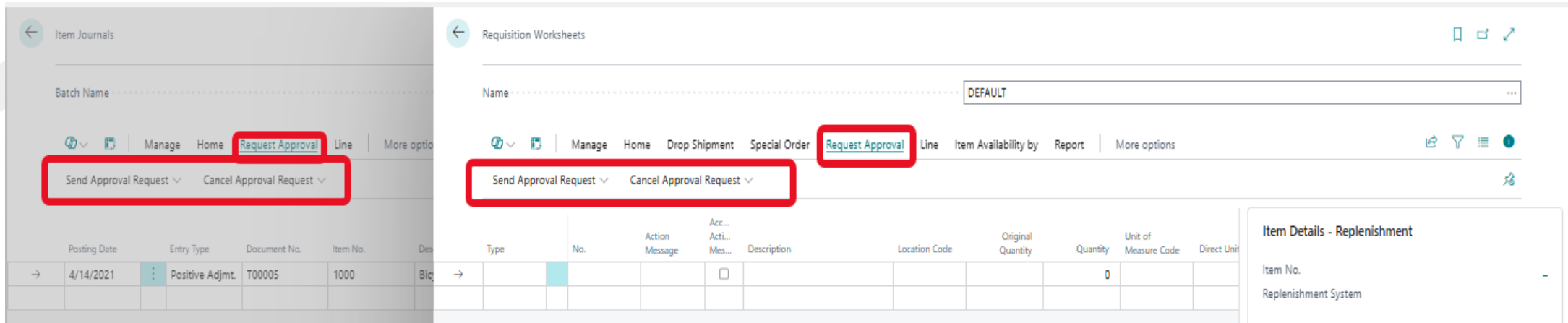
BC Breakout Session

June 18, 2026

- 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

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



The image displays two screenshots of the Dynamics 365 Business Central interface. The left screenshot shows the 'Item Journals' page, and the right screenshot shows the 'Requisition Worksheets' page. Both screenshots highlight the 'Request Approval' button and the 'Send Approval Request' / 'Cancel Approval Request' dropdown menu with red boxes. The 'Requisition Worksheets' page also shows a table with columns for 'Type', 'No.', 'Action Message', 'Acc... Act... Mes...', 'Description', 'Location Code', 'Original Quantity', 'Quantity', 'Unit of Measure Code', and 'Direct Unit'.

Summary of BC Journals that have Workflow Approvals

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL WORKFLOWS & APPROVALS – COMPLETE SUMMARY

Create approval workflows and notifications for transactions, journals, master data and more.

1. SALES DOCUMENTS <ul style="list-style-type: none"> Sales Quote Sales Order Sales Invoice Sales Credit Memo Sales Return Order Blanket Sales Order <p>Sales Document Approvals (amount-based)</p>	PURCHASE DOCUMENTS <ul style="list-style-type: none"> Purchase Quote Purchase Order Purchase Invoice Purchase Credit Memo Purchase Return Order Blanket Purchase Order <p>Purchase Document Approvals (amount-based)</p>	3. JOURNALS <ul style="list-style-type: none"> General Journal Batches General Journal Lines Payment Journals Cash Receipt Journals Intercompany General Journals <hr/> <ul style="list-style-type: none"> Item Journals (BC28) Physical Inventory Journals (BC28) Consumption Journals (BC28) Output Journals (BC28) 	4. PLANNING & SUPPLY CHAIN <ul style="list-style-type: none"> Requisition Worksheets (BC28) Planning Worksheets (BC28) <div style="border: 1px solid white; padding: 5px; margin-top: 10px;"> <p>NEW IN BC28 Item, Physical Inventory, Consumption, Output Journals, Requisition Worksheets and Planning Worksheets now support approvals.</p> </div>
5. MASTER DATA <ul style="list-style-type: none"> Customer Cards Vendor Cards Item Cards G/L Accounts Fixed Assets Bank Accounts Dimensions Workflow User Setup Changes User Setup Changes 	6. MASTER DATA CHANGES (FIELD-LEVEL APPROVAL) <p>Approve changes to sensitive fields such as:</p> <ul style="list-style-type: none"> Customer Credit Limit Vendor Payment Information Vendor Bank Account No. Sales Prices Purchase Prices Other approved field changes supported by workflow events 	7. INCOMING DOCUMENTS <ul style="list-style-type: none"> Incoming Documents OCR Documents Document Release / Approval Events 	MOST COMMON WORKFLOWS USED <ol style="list-style-type: none"> Purchase Orders Purchase Invoices Payment Journals General Journals Sales Orders (amount/discount approvals) Vendor Creation/Changes Customer Creation/Changes Item Creation/Changes Item Journals (BC28+)

8. COMMON WORKFLOW EVENTS (EXAMPLES)

A record is created	A record is changed	A record is deleted	A journal line is created	A document is released
An approval is requested	An approval is approved	An approval is rejected	An approval is delegated	A reminder is sent

9. WORKFLOW ACTIONS (EXAMPLES)

Request Approval	Send Notification	Create Record	Update Record	Delete Record
Add Record Restriction	Remove Record Restriction	Delegate Approval	Send Email	Start Workflow

10. REPORTING & REPORT-RELATED ENHANCEMENTS IN BC28

Financial Reporting Enhancements Improvements to Account Schedules / Financial Reports and better analysis capabilities.	Modernized Analytical Inventory Reports Several inventory analysis reports updated to the newer reporting framework for improved performance and usability.	Report Layout Lifecycle Management New administration capabilities for RDLC, Word and Excel layouts. Better governance of report layouts.	Default Language (Company Level) Document reports (Sales Invoice, Sales Credit Memo, Purchase Order, Purchase Invoice, Remittance Advice) inherit company-level default language.	New in 28.1 Enhanced and faster reports for Deferral Analysis and Trial Balance.
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HOW TO SEE & MANAGE WORKFLOWS

- Go to: Search → Workflows → Workflow Templates
- View Microsoft-delivered workflow templates
- Enable and customize templates as needed
- Set up approvers in Approver User Setup
- Monitor in Workflow User Requests

KEY BENEFITS

- Ensure control and compliance
- Reduce risk with approvals
- Improve accountability
- Automate notifications
- Support delegated approvals

NOTE

Availability may vary slightly by version and localization. Check your environment for the exact list of workflow templates.

Workflow approvals in Business Central help you automate business processes, ensure policies are followed and keep your business in control.

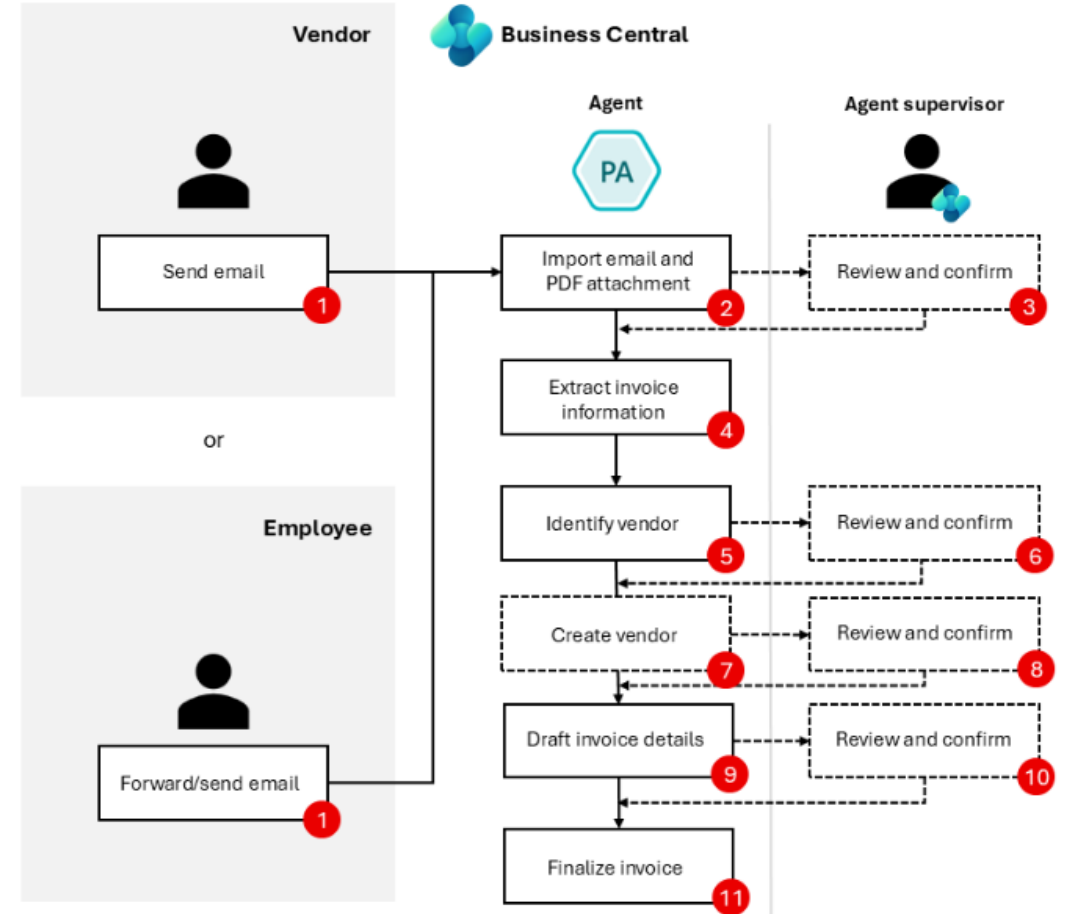
Microsoft Dynamics 365 Business Central

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

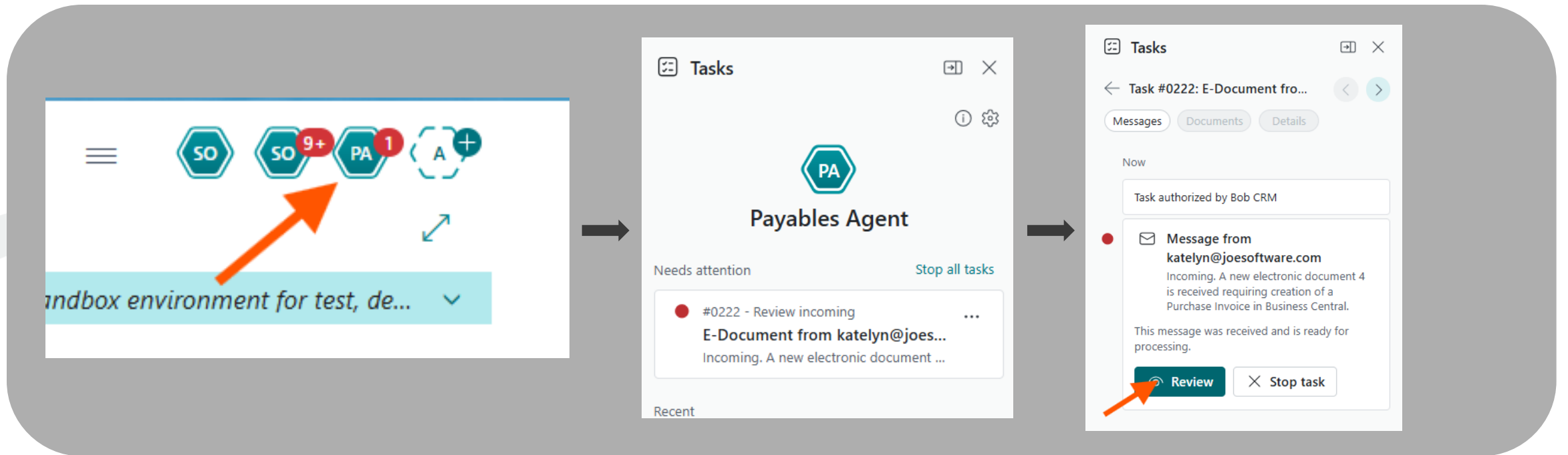
Requirements

- 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

Purchase Document Draft

Invoice.pdf - OFFICE FURNITURE INC. - 4

Updates ready for review: Include changes from Payables Agent. Review agent task

Review (2) Done

View Help More options

View pdf View extracted data

General Show more

Purchase Document: [redacted] Document No.: 145

Vendor No.: V00100 Posting Description: Payables Agent

Vendor Name: - OFFICE FURNITURE INC. Document Date: 5/22/2026

Due Date: [calendar icon]

Lines Fields for review: 2 AI-generated content may be incorrect Manage Line

New Line Delete Line

Description	Type	No.	Unit of Measure	Variant Code	Quantity
Office Desk Model 5	G/L Account	17110			5
Armchair Model 3	G/L Account	17110			3

Summary Preview

Details Attachments (1)

Preview

INVOICE - OFFICE FURNITURE INC.

10101 Mt. Lake Rd NW
Dover, OH 43001
Phone: 614-457-9100

INVOICE # 145
DATE: 5/22/2026

PURCHASED BY:
Kathleen Williams
Coral
2017749-00
Troy, OH, 45375-0100
Phone: 937-233-0000

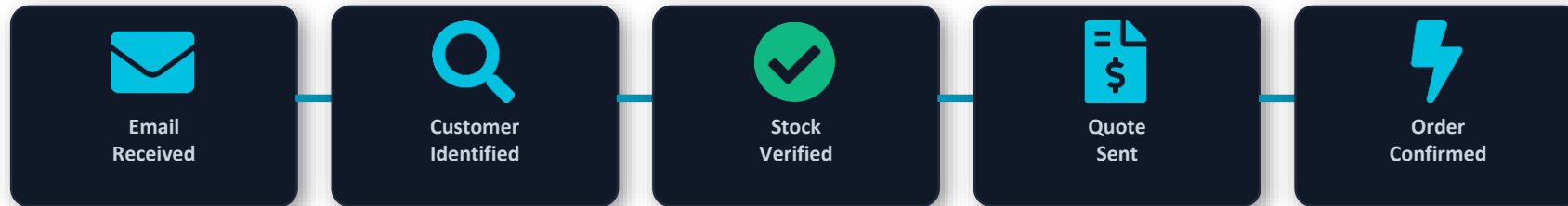
SHIP TO:
Kathleen Williams
Coral
2017749-00
Troy, OH, 45375-0100
Phone: 937-233-0000

COMMENTS OR SPECIAL INSTRUCTIONS:
Disrupt usage!

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
5	Office Desk Model 5	\$15.00	\$75.00
3	Armchair Model 3	\$30.00	\$90.00
	Subtotal		\$165.00

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 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.

	<p>Dynamics 365 Business Central Licence (Essentials or Premium)</p> <ul style="list-style-type: none"> ✓ Core Copilot features included at no extra cost with any BC licence ✓ Essentials covers sales, purchasing, finance & supply chain ✓ Sales Order Agent access is bundled — no separate AI licence needed ✓ Premium adds manufacturing, service management & advanced warehouse 	<p>REQUIRED — INCLUDED</p>
	<p>Copilot Credits (Pay-as-You-Go)</p> <ul style="list-style-type: none"> ✓ Autonomous agent tasks (email reading, quote creation) consume Copilot Credits ✓ M365 Copilot licence includes 25,000 credits per user/month ✓ Credits are billed per task complexity — simple reads cost fewer credits ✓ BC-only tenants: set up consumption billing in the BC Admin Center 	<p>REQUIRED — CONSUMPTION BILLING</p>
	<p>Microsoft 365 Copilot (Add-on)</p> <ul style="list-style-type: none"> ✓ Brings Copilot into Teams, Outlook, Word, Excel alongside BC ✓ Required for the full M365 + BC integrated agent stack ✓ Enables conversational BC interactions from within M365 apps ✓ Includes 25,000 Copilot Credits — covers most agent workloads 	<p>OPTIONAL — ENHANCES EXPERIENCE</p>
<p> 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.</p>		

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 reporting.



Project Billing

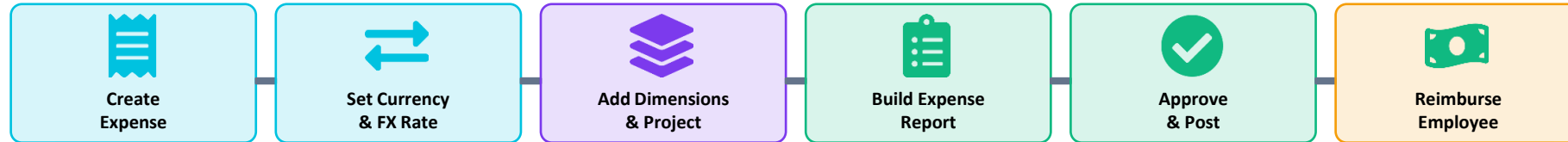
Link each expense to an existing BC Project No. Costs post directly to the project's WIP ledger. Bill expenses to the client using standard BC Project Invoicing. Supports Time & Material and Fixed Price contract types with full traceability.




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?




 **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

The screenshot shows the 'Capital Structure (ANALYSIS)' report configuration in the Jo software interface. The 'Default Excel Layout' is set to 'L&L'. Below the configuration, the Excel layout is displayed, featuring a table of financial data, a pie chart titled 'Filters 04/14/21 CAD Balance', and a line chart titled 'Filters 04/14/21 CAD Balance'.

ACID-TEST ANALYSIS	Balance
Current Assets	
01 Liquid Assets	-122897
03 Accounts Receivable	115662.2
04 Inventory	208061
05 WIP	-750
06 Current Assets, Total	200075.7
Short-term Liabilities	
12 Accounts Payable	104868.4
13 Sales Taxes Payable	-4724.71
16 Short-term Liabilities, Total	100143.6
Current Assets minus Short-term Liabilities	99932.07

Excel Trial Balance

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

Cronos Mfg Demo | Finance | Cash Management | Sales | Purchasing | Graphical Scheduler | Quality Inspector | Popdock

Chart of Accounts: All | + New | Delete | Edit List | Home | Account | Balance | Navigate | Report | More options

No.	Name	Net Change	Balance	Income/Ba...	Acc...
10000	ASSETS	-	-	Balance Sh...	Ass
10910	WIP Job Sales	-	-	Balance Sh...	Ass
10920	Invoiced Job Sales	-	-	Balance Sh...	Ass
10940	Accrued Job Costs	-	-	Balance Sh...	Ass

Report menu options:

- Trial Balance Detail/Summary
- Trial Balance (Obsolete)
- Consol. Trial Balance
- G/L Register
- Trial Balance (Excel)**

Trial Balance (\$)									
									Company name Value
#N/A									#NAME?
#NAME?									#NAME?
No.	Name	Account Type	Starting Balance (Debit)	Balance (Credit)	Net Change (Debit)	Change (Credit)	Balance (Debit)	Balance (Credit)	
0000	BLANK	(blank)	0.00	0.00	0.00	0.00	0.00	0.00	
Grand Total			0.00	0.00	0.00	0.00	0.00	0.00	0.00

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...	<input type="checkbox"/>	Subscription Billing by Microsoft	RDL	<input type="checkbox"/>	Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation (RDL)	Detailed layout with all fields.	<input type="checkbox"/>	Base Application by Microsoft	RDL	<input type="checkbox"/>	Approved	Default		
1305	Sales - Confirmation	Custom Order Confirmation	Custom Order Confirmation	<input type="checkbox"/>		Word	<input type="checkbox"/>	Draft	Default	6/12/2026 1:38 PM	COURTNEY
→ 1305	⋮ Sales - Confirmation	Sales Order Confirmation for Subscription Billing (L...	The Sales Order Confirmation for Subscription Billin...	<input checked="" type="checkbox"/>	Subscription Billing by Microsoft	Word	<input type="checkbox"/>	Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation Email (Word)	Layout intended for an email body.	<input type="checkbox"/>	Base Application by Microsoft	Word	<input type="checkbox"/>	Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation (Word)	Simple layout with most necessary fields.	<input checked="" type="checkbox"/>	Base Application by Microsoft	Word	<input type="checkbox"/>	Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation Blue (Word)	Simple layout with most necessary fields with a blu...	<input type="checkbox"/>	Base Application by Microsoft	Word	<input type="checkbox"/>	Approved	Default		
1305	Sales - Confirmation	Standard Sales Order Confirmation - themable Wor...	Simple themable layout with most necessary fields.	<input type="checkbox"/>	Base Application by Microsoft	Word	<input type="checkbox"/>	Approved	Default		

Report Layouts | 🔍 | ...

Report ID ↑ ▼	Layout Name
1305	Sales Order Confirmation for Subscript
1305	Standard Sales Order Confirmation (RDL)
→ 1305	Custom Order Confirmation
1305	Sales Order Confirmation for Subscript
1305	Standard Sales Order Confirmation Em
1305	Standard Sales Order Confirmation (W
1305	Standard Sales Order Confirmation Blu

- Manage >
 - New
 - Edit info
 - Run report
 - Export layout
 - Replace layout
 - Layout >
 - Actions >
 - Layout Status >
 - Set Approved
 - Set Draft
 - Set Pending Approval
 - Set Retired
 - Other >
 - Fewer options
 - Show as menu

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 subtalled 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.

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

Don't forget to follow us on Social Media for more exciting BC/GP/AI news:

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- Website: <https://www.Joesoftware.com/>
- Blog: <https://www.Joesoftware.com/blog/>



Courtney Stang
Consultant at Joesoftware Inc.



Cameron Wengreniuk
IT Consultant Helping Businesses Optimize
with Business Central & GP | MB-800 Certif...



Juan Benavides
Business Central Consultant @
Joesoftware | Dynamics 365 BC deve...



Katelyn Fiolleau
Junior Consultant at Joesoftware Inc.

