



The Power of the Dynamics 365 Ecosystem

Presenter: Garrett Wengreniuk | 35 minutes + 10 minute Q&A

	Section	
	Why Finance Cares about the Microsoft Ecosystem	
	Dynamics BC / Microsoft 365 Integration	
	Copilot / AI in BC — <i>Live Demo</i>	
	Apps / Power Platform — <i>Live Demo</i>	
	Where to Start	
	Questions	

Why Finance Cares about the Microsoft Ecosystem

The Microsoft Ecosystem is a suite of products that work together to help save you time and effort while improving accuracy, and giving your team access to relevant and timely information. Some key areas where these tools and products can help include:

1

**Manual Entry &
Reconciliation**

2

Chasing Approvals

3

**Building Reports from
Scratch**

1

Excel-Based Entry, Editing, Reporting & Budgeting

Directly against live BC data — Edit in Excel, Export to Excel, Analyze in Excel. Use the tool you already know, and don't have to spend time trying to get them to talk to each other due to native integration

2

Microsoft Teams Integration

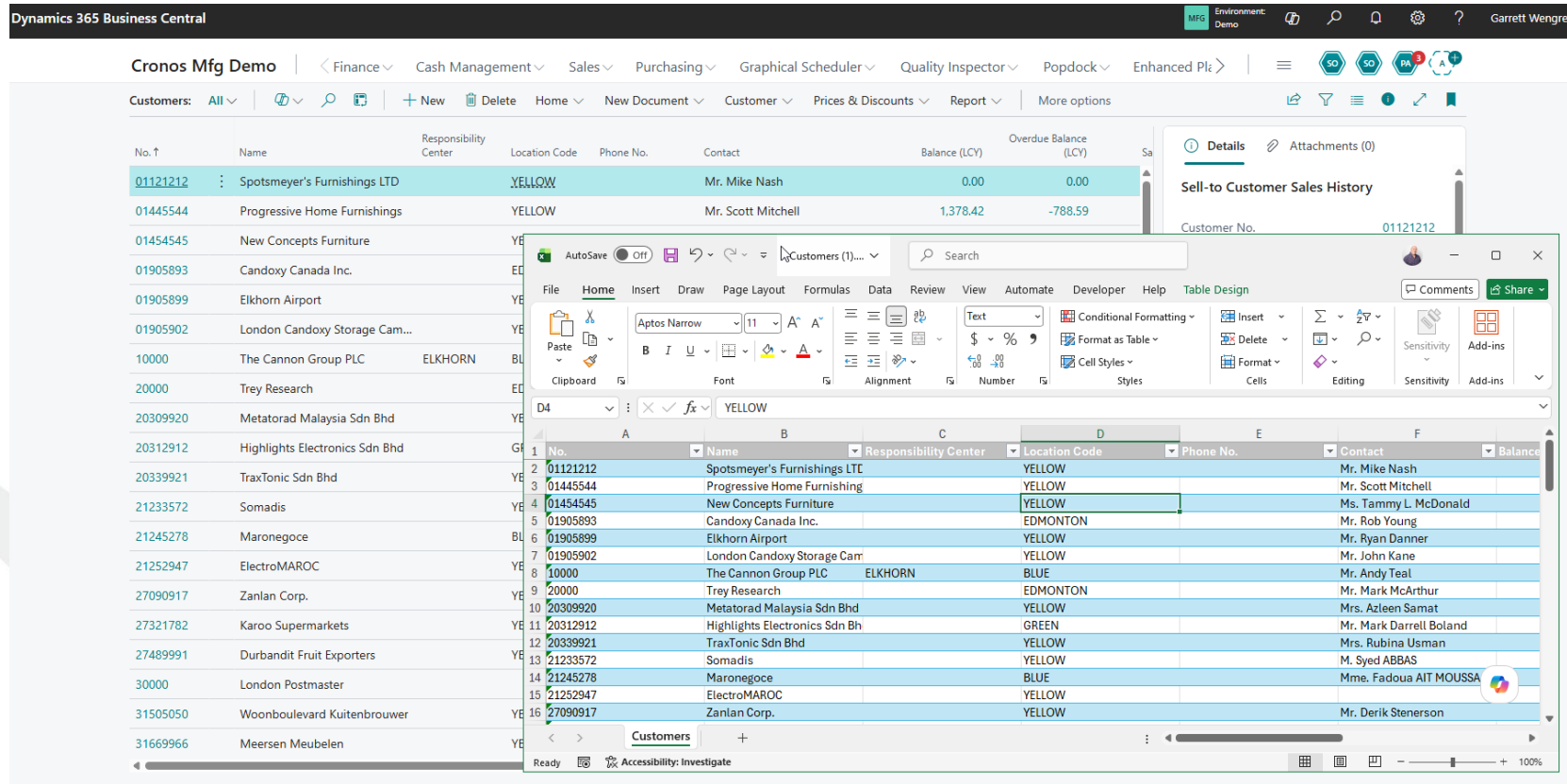
Teams App gives controlled access to Financial information without having to open BC, and allows you to “interact” with your data, as if you're talking to an internal Finance team member. You can also have workflows presented through teams to ask questions, and for handling things like Approvals.

3

OneDrive / SharePoint Integration

Documents can be stored in OneDrive / Sharepoint, and are then fully sortable, indexed, searchable, and can have managed lifecycle for compliance. Workflows can be triggered from Sharepoint documents, and data is accessible from anywhere with an internet connection or kept “offline” and synched.

- **Open in Excel and Edit in Excel, right from your Business Central pages**



The screenshot shows the Dynamics 365 Business Central interface for 'Cronos Mfg Demo'. A table of customers is displayed, with columns for No., Name, Responsibility Center, Location Code, Phone No., Contact, Balance (LCY), and Overdue Balance (LCY). An Excel spreadsheet is overlaid on the table, showing the same data in a grid format. The Excel interface includes the ribbon (File, Home, Insert, Draw, Page Layout, Formulas, Data, Review, View, Automate, Developer, Help, Table Design) and the data grid. The current cell selected in Excel is D4, containing the value 'YELLOW'.

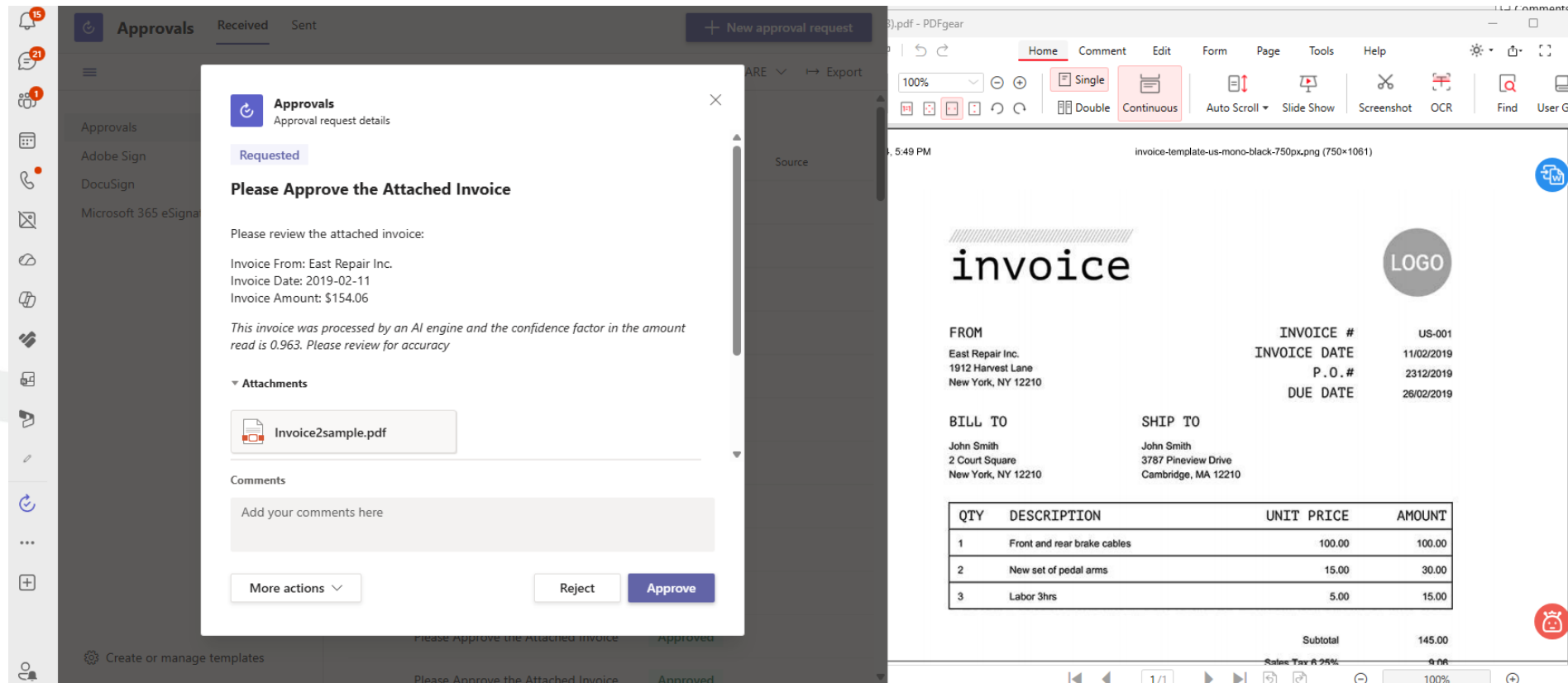
No.	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Overdue Balance (LCY)
01121212	Spotsmeyer's Furnishings LTD		YELLOW		Mr. Mike Nash	0.00	0.00
01445544	Progressive Home Furnishings		YELLOW		Mr. Scott Mitchell	1.378.42	-788.59
01454545	New Concepts Furniture		YELLOW				
01905893	Candoxy Canada Inc.		EDMONTON		Mr. Rob Young		
01905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner		
01905902	London Candoxy Storage Cam...		YELLOW		Mr. John Kane		
10000	The Cannon Group PLC	ELKHORN	BLUE		Mr. Andy Teal		
20000	Trey Research		EDMONTON		Mr. Mark McArthur		
20309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat		
20312912	Highlights Electronics Sdn Bhd		GREEN		Mr. Mark Darrell Boland		
20339921	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman		
21233572	Somadis		YELLOW		M. Syed ABBAS		
21245278	Maronegoce		BLUE		Mme. Fadoua AIT MOUSSA		
21252947	ElectroMAROC		YELLOW				
27090917	Zanlan Corp.		YELLOW		Mr. Derik Stenerson		
27321782	Karoo Supermarkets						
27489991	Durbandit Fruit Exporters						
30000	London Postmaster						
31505050	Woonboulevard Kuitenbrouwer						
31669966	Meersen Meubelen						

- Tell CoPilot what you want to do, let it figure out the steps and formulas

The screenshot displays the Microsoft Excel interface with a data table and the CoPilot sidebar. The table contains customer information with columns for No., Name, Responsibility Center, Location Code, Phone No., Contact, Balance (LCY), and Overdue Balance (LCY). The CoPilot sidebar on the right shows a natural language instruction: "Sort my spreadsheet by descending Balance, and highlight any customers with an Overdue Balance in Bright Red".

No.	Name	Responsibility Center	Location Code	Phone No.	Contact	Balance (LCY)	Overdue Balance (LCY)	Sales
01121212	Spotsmeyer's Furnishings LTC		YELLOW		Mr. Mike Nash	0.00	0.00	
01445544	Progressive Home Furnishing		YELLOW		Mr. Scott Mitchell	1,378.42	-788.59	
01454545	New Concepts Furniture		YELLOW		Ms. Tammy L. McDonald	217.05	0.00	
01905893	Candoxy Canada Inc.		EDMONTON		Mr. Rob Young	105.00	0.00	
01905899	Elkhorn Airport		YELLOW		Mr. Ryan Danner	508.50	0.00	
01905902	London Candoxy Storage Cam		YELLOW		Mr. John Kane	0.00	0.00	
10000	The Cannon Group PLC	ELKHORN	BLUE		Mr. Andy Teal	0.00	0.00	
20000	Trey Research		EDMONTON		Mr. Mark McArthur	2,945.23	2,945.23	
20309920	Metatorad Malaysia Sdn Bhd		YELLOW		Mrs. Azleen Samat	0.00	0.00	
20312912	Highlights Electronics Sdn Bh		GREEN		Mr. Mark Darrell Boland	0.00	0.00	
20339921	TraxTonic Sdn Bhd		YELLOW		Mrs. Rubina Usman	0.00	0.00	
21233572	Somadis		YELLOW		M. Syed ABBAS	0.00	0.00	
21245278	Maronegoce		BLUE		Mme. Fadoua AIT MOUSSA	0.00	0.00	
21252947	ElectroMAROC		YELLOW			0.00	0.00	
27090917	Zanlan Corp.		YELLOW		Mr. Derik Stenerson	0.00	0.00	
27321782	Karoo Supermarkets		YELLOW		Mr. Pieter Wycoff	0.00	0.00	
27489991	Durbandit Fruit Exporters		YELLOW		Mr. Eric Lang	0.00	0.00	
30000	London Postmaster				Miss Patricia Doyle	86,248.50	82,165.58	
31505050	Woonboulevard Kuitenbrouw		YELLOW		Pok Chi Hui	0.00	0.00	

- Approval notifications and adaptive cards surface directly in Teams



The screenshot shows a Microsoft Teams interface. On the left, the 'Approvals' app is visible in the sidebar. The main area displays an approval notification card titled 'Please Approve the Attached Invoice'. The card contains the following information:

- Requested**
- Please Approve the Attached Invoice**
- Please review the attached invoice:
- Invoice From: East Repair Inc.
- Invoice Date: 2019-02-11
- Invoice Amount: \$154.06
- This invoice was processed by an AI engine and the confidence factor in the amount read is 0.963. Please review for accuracy*
- Attachments**: Invoice2sample.pdf
- Comments**: Add your comments here
- More actions** (dropdown), **Reject**, **Approve**

On the right, a PDF viewer displays the invoice document. The invoice includes the following details:

- FROM**: East Repair Inc., 1912 Harvest Lane, New York, NY 12210
- INVOICE #**: US-001
- INVOICE DATE**: 11/02/2019
- P.O.#**: 2312/2019
- DUE DATE**: 26/02/2019
- BILL TO**: John Smith, 2 Court Square, New York, NY 12210
- SHIP TO**: John Smith, 3787 Pineview Drive, Cambridge, MA 12210

QTY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Front and rear brake cables	100.00	100.00
2	New set of pedal arms	15.00	30.00
3	Labor 3hrs	5.00	15.00
Subtotal			145.00

- **PowerBI Reports directly in Teams, with bookmarked “curated” snapshots**

Financial Overview Company Name: Rene Sample - Last Refreshed: 1/30/2026 05:15 AM

Revenue	Net Profit	Net Profit Margin	Assets	Days Sales Outstanding - ...	Days Sales Of Inventory - ...	Days Payable Outstanding ...
681.05K	1.51M	221.76%	2.59M	3.1K	-6.2K	-1.1K

Return On Assets - ROA by Month

Month	ROA (%)
Jan 2020	9.20%
Feb 2020	11.09%
Mar 2020	7.78%
Apr 2020	5.09%
May 2020	4.15%
Jun 2020	3.80%
Jul 2020	
Aug 2020	
Sep 2020	
Oct 2020	
Nov 2020	
Dec 2020	
Jan 2021	15.22%
Feb 2021	

Top 5 Customers by Balance

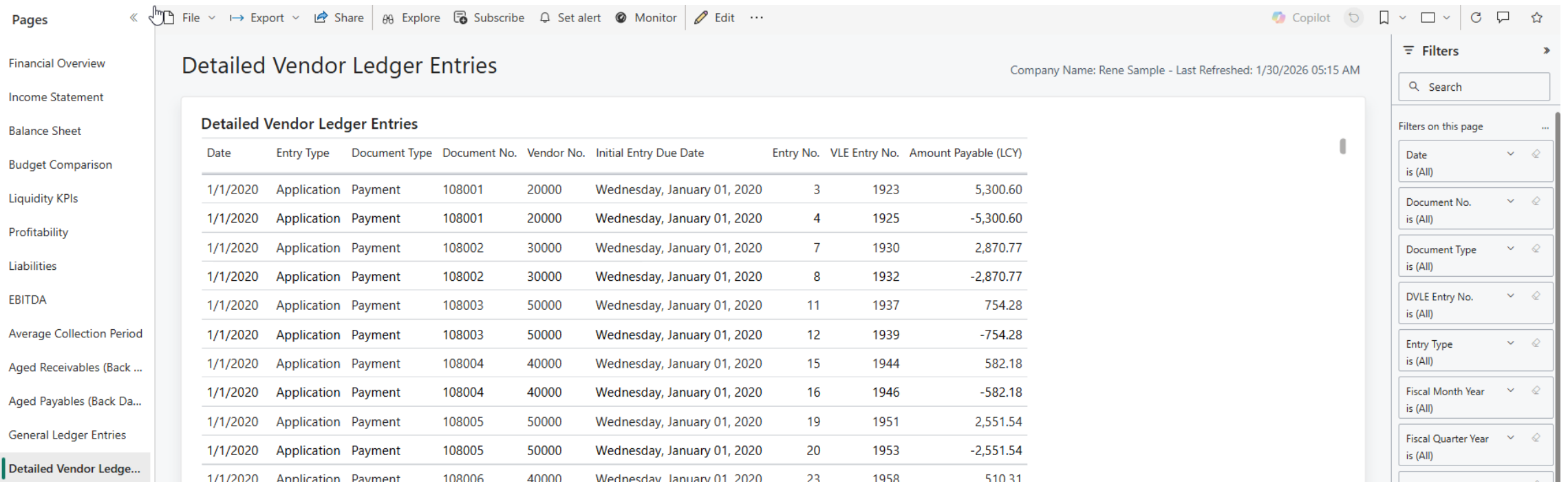
Customer	Balance
50000 Relecloud	50000
30000 School of...	30000
C00080 PC Constr...	
C00040 Best...	
20000 Trey Research	20000

Top 5 Vendors by Balance

Vendor	Balance
40000 Wide Worl...	40000
11000 Fabrikam, Inc.	11000
30000 Graphic ...	30000
50000 Nod Publishers	50000

Net Profit Margin by Fiscal Year and Month **Asset Turnover Ratio by Fiscal Year and Month**

- Standardized financial data with filtering, sorting, aggregation, within MS Teams

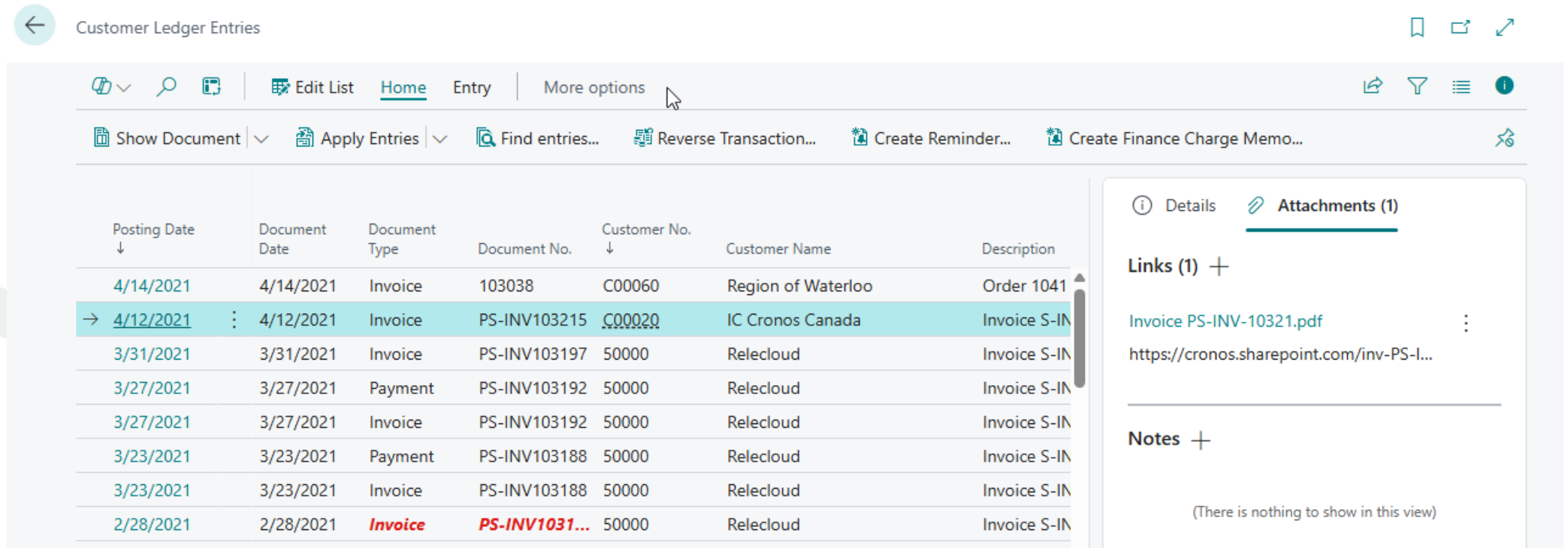


The screenshot shows a Microsoft Teams interface displaying a Power BI report. The report title is "Detailed Vendor Ledger Entries" for the company "Rene Sample", last refreshed on 1/30/2026 at 05:15 AM. The report contains a table with the following data:

Date	Entry Type	Document Type	Document No.	Vendor No.	Initial Entry Due Date	Entry No.	VLE Entry No.	Amount Payable (LCY)
1/1/2020	Application	Payment	108001	20000	Wednesday, January 01, 2020	3	1923	5,300.60
1/1/2020	Application	Payment	108001	20000	Wednesday, January 01, 2020	4	1925	-5,300.60
1/1/2020	Application	Payment	108002	30000	Wednesday, January 01, 2020	7	1930	2,870.77
1/1/2020	Application	Payment	108002	30000	Wednesday, January 01, 2020	8	1932	-2,870.77
1/1/2020	Application	Payment	108003	50000	Wednesday, January 01, 2020	11	1937	754.28
1/1/2020	Application	Payment	108003	50000	Wednesday, January 01, 2020	12	1939	-754.28
1/1/2020	Application	Payment	108004	40000	Wednesday, January 01, 2020	15	1944	582.18
1/1/2020	Application	Payment	108004	40000	Wednesday, January 01, 2020	16	1946	-582.18
1/1/2020	Application	Payment	108005	50000	Wednesday, January 01, 2020	19	1951	2,551.54
1/1/2020	Application	Payment	108005	50000	Wednesday, January 01, 2020	20	1953	-2,551.54
1/1/2020	Application	Payment	108006	40000	Wednesday, January 01, 2020	23	1958	510.31

The interface includes a sidebar with navigation options like "Financial Overview", "Income Statement", and "Balance Sheet". A "Filters" sidebar on the right allows for filtering the data by various criteria such as Date, Document No., Document Type, DVLE Entry No., Entry Type, Fiscal Month Year, and Fiscal Quarter Year.

- **Link your financial data to Sharepoint for uploads, document review, AI processing, workflows, and more. Fully searchable, with history and compliance.**



Customer Ledger Entries

[Home](#) | [Entry](#) | [More options](#)

[Show Document](#) | [Apply Entries](#) | [Find entries...](#) | [Reverse Transaction...](#) | [Create Reminder...](#) | [Create Finance Charge Memo...](#)

Posting Date ↓	Document Date	Document Type	Document No.	Customer No. ↓	Customer Name	Description
4/14/2021	4/14/2021	Invoice	103038	C00060	Region of Waterloo	Order 1041
→ 4/12/2021	4/12/2021	Invoice	PS-INV103215	C00020	IC Cronos Canada	Invoice S-IN
3/31/2021	3/31/2021	Invoice	PS-INV103197	50000	Relecloud	Invoice S-IN
3/27/2021	3/27/2021	Payment	PS-INV103192	50000	Relecloud	Invoice S-IN
3/27/2021	3/27/2021	Invoice	PS-INV103192	50000	Relecloud	Invoice S-IN
3/23/2021	3/23/2021	Payment	PS-INV103188	50000	Relecloud	Invoice S-IN
3/23/2021	3/23/2021	Invoice	PS-INV103188	50000	Relecloud	Invoice S-IN
2/28/2021	2/28/2021	Invoice	PS-INV1031...	50000	Relecloud	Invoice S-IN

[Details](#) | [Attachments \(1\)](#)

Links (1) +

Invoice PS-INV-10321.pdf

<https://cronos.sharepoint.com/inv-PS-I...>

Notes +

(There is nothing to show in this view)

Bank Reconciliation

Matching suggestions speed up reconciling statements against entries

Analyze List

Natural-language Q&A against your live BC data — no report-building required

Cash Flow Prediction

Forecasting and late-payment prediction built into BC

“Give me a list of all customers with overdue balances, with their contact info”

Page: Customer Ledger Entries

Example

Scenario: We need to clean up our receivables. We need a list of all overdue invoices, along with the contact information to reach out to those customers.

1. Navigate to Customer Ledger Entries.
2. Click “Analyze List”
3. Enter your natural-language request, for example
“Give me a list of all customers with overdue balances, with their contact info”
4. **Go grab a coffee and enjoy a few minutes with the time you saved**

Live Demo 2: Self-Service Invoice Status in Teams

Scenario: *The list was a week old – what if I need an updated list in real time while I’m on the phone with the customer?*

1. Type “Invoices” as a normal Teams message in the Lunch and Learn 2026 channel — no menus, no clicking through Workflows.
2. A card appears with a live dropdown of real BC customers, built dynamically from the Customers table.
3. Pick a customer (e.g., Trey Research) → click “View Invoice Status.”
4. Teams responds with the answer – the open invoices with their Invoice Number, amount, due date.

The sales rep just answered their own question — no spreadsheet, no phone call or email to finance, no BC license required. You can even do this on your mobile.

Power Automate

- Approval workflows
- Automated Q&A with BC, without every touching BC
- Scheduled report distribution
- *Anything you do repeatedly*

Power Apps

- Expense submission
- Vendor onboarding
- Both flow directly into BC
- *Friendly, simple interfaces to your business data*

Cost: Some included with your BC / CRM / MS Licensing, some add-on.
Value: How long it takes you to do this X how many times you do this

Start with one flow or one integration. We can help.

Most clients begin with a single Power Automate flow, or one Excel / Teams integration — Once you see how easy it can be, you can add more.

Thank you for your time and attention. What can we dig into?

Garrett Wengreniuk | Joesoftware