CONVERGENCE | AI + ERP

MIAMI | 2025

Core Functionalities Overview Business Central

including agentic and AI capabilities

Sponsored By Microsoft

Hosted By DYNAMICS USER GROUP

Agenda

- Business Central application overview
- Integration to M365 (Excel, Outlook, Teams, Word)
- Integration with Sales / Field Service
- Integration with Shopify
- Copilot in Business Central
- Capabilities guide
- Trial

Business Central Supercharges SMBs with AI

A rock-solid ERP foundation

for small and medium businesses

Enhanced and extended

with more than 8,000 solutions on AppSource

Mapped to your processes

through the expertise and effort of our partners

Automated

with the power of prebuilt and custom agents

Integrated natively

through the entire Microsoft ecosystem

Dynamics 365 Business Central Capabilities

Finance and Accounting

- General Ledger
- Unlimited Dimensions
- Multiple currencies
- Multiple companies
- Budgets
- Financial reporting
- Consolidation
- Intercompany postings
- Statistical accounts
- Cash flow forecast
- Fixed assets
- Cost accounting
- Deferrals
- Electronic payments/direct debits
- Customer payment process
- Late payment prediction
- Bank account reconciliation
- Bank account management
- Check writing

Sales and marketing

- Marketing text suggestions
- Contact management
- Campaign management
- Interaction and email logging
- Opportunity management
- Dynamics 365 Sales integration

Fulfillment and delivery

- Sales invoicing
- Sales order management
- Sales line and invoice discounting
- Campaign pricing
- Returns and exchanges
- Dynamics 365 Customer Service integration

Purchasing and payables

- Purchase invoicing
- Purchase order management
- Purchase return order management
- Alternative order addresses
- Purchase invoice discounts

Inventory

- Inventory control
- Item categories and attributes
- Item tracking
- Multiple locations
- Location transfers

Supply planning and availability

- Supply planning
- Demand forecasting
- Sales and inventory forecasting
- Order promising
- Calendars

Project management

- Basic resources
- Capacity management
- Multiple costs
- Projects
- Time sheets

Service management*

- Planning and dispatching
- Service contract management
- Service item management
- Service order management
- Service price management
- Dynamics 365 Field Service integration

Warehouse management

- Bin Tracking
- Inventory picks and put-aways
- Warehouse receipt
- Warehouse shipment

Manufacturing*

- Assembly management
- Standard cost worksheet
- Production bill of materials
- Basic capacity planning
- Machine centers
- Version management

*Available in Dynamics 365 Business Central Premium

AI/Copilot in Business Central features

Return to capabilities overview slide

Manufacturing core capabilities

Production methods	Make to Stock/Make to Order	Assemble to Stock/ Assemble to Order	Engineer to order	
Version management	Bill of material	Routing	Automatic selection based on date, location or variant	Version of BOM line
Bill of material	Raw materials, sub-assembly, phantom BOMs	Units of measure and rounding	Formulas	Scrap
Capacity	Work and machine centers	Setup, execution, wait, move time	Subcontracting	Capacity-constraint resources
Execution	Automatic flushing	Production, consumption, output journals	Adjustments	WIP and cost
Reporting and analytics	Interactive dashboards (Power BI)	Self-serve reports (Excel)	Built-in intelligence (Analysis mode)	Embedded KPIs

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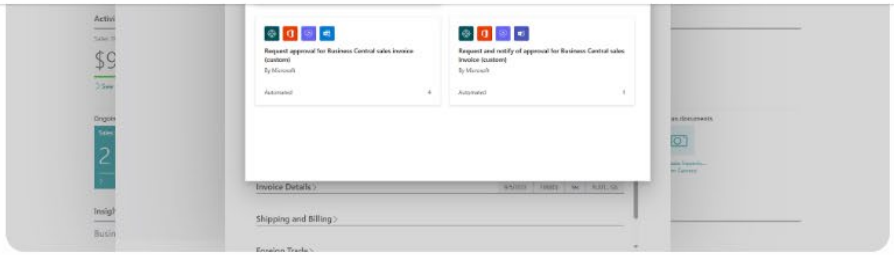
Boost productivity

Get world-class security and compliance

Make data-driven decisions



Download the guide

COPILOT IN BUSINESS CENTRAL

Work smarter with Microsoft Copilot and AI agents

Use next-generation AI with Copilot in Dynamics 365 Business Central to automate sales and payables, boost productivity, and make smarter decisions.

Automate and simplify work | Save time and spark creativity | Transform the month-end close process | Make data-driven decisions

Deliver on more inbound orders faster with Sales Order Agent (in preview)

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Business-Central-Capability-Guide.pdf

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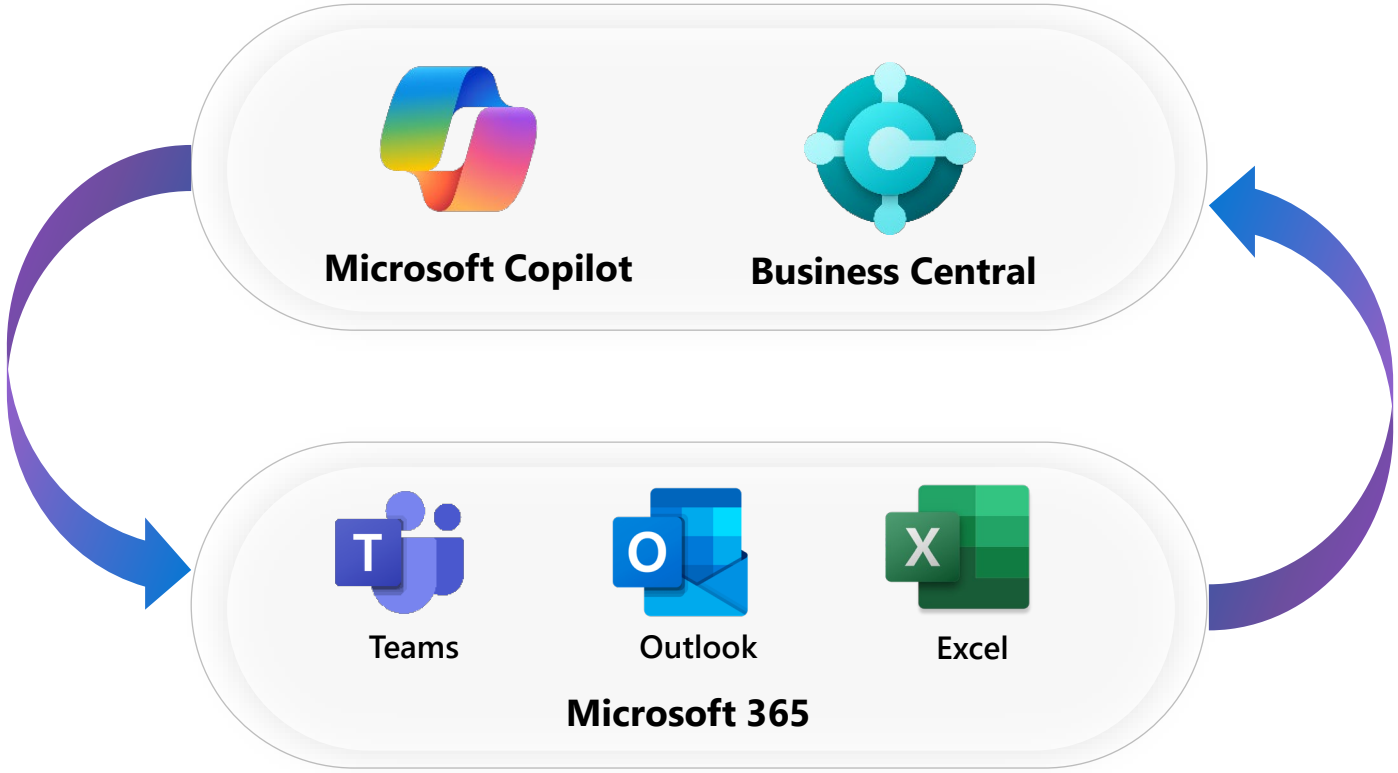
Work smarter with Copilot in Business Central and connect it with Microsoft 365 apps

Seamlessly connect Business Central + Microsoft 365 and harness the power of Copilot

Collaborate in the apps where teams work best. Connect Business Central to Outlook, Excel, and Teams— work seamlessly together with timely data

Stay in the flow of work. Get the data employees need in the tools they prefer— without switching applications

Connect the dots with Copilot. Work between applications with greater continuity, guided by AI. Get help drafting emails, summarizing information, and more —no matter where you work



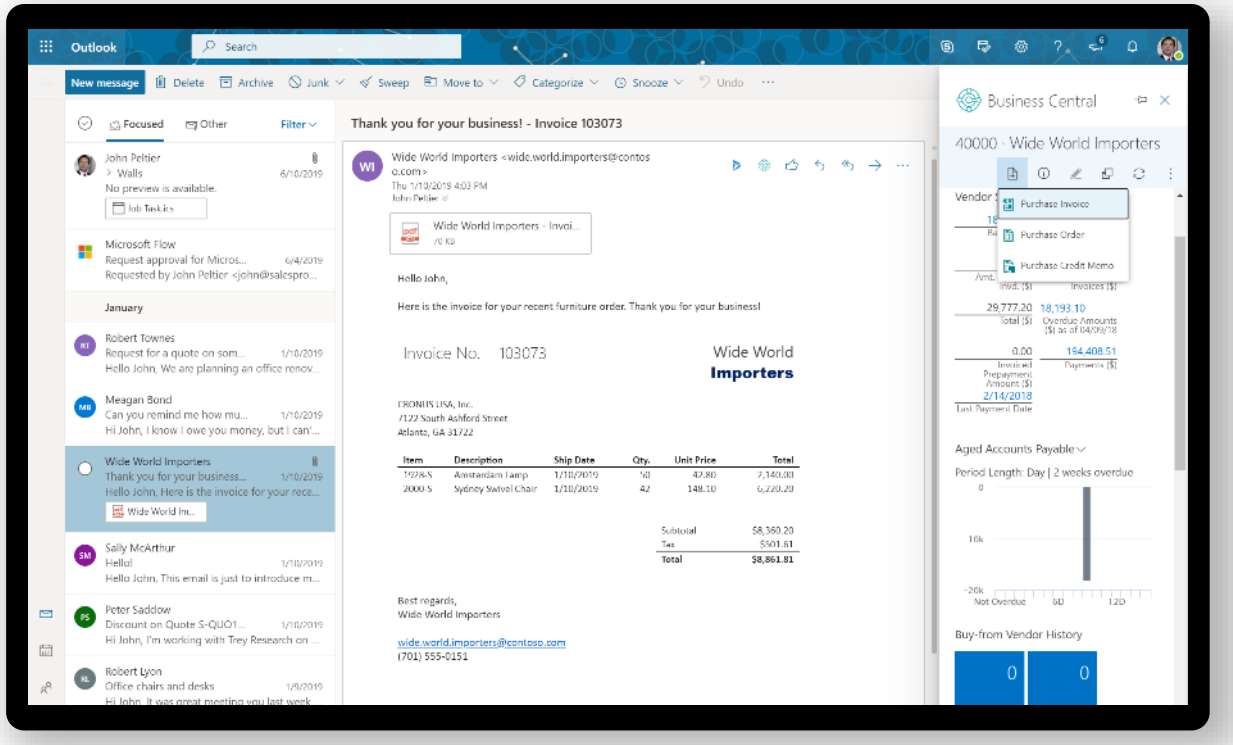
Dynamics 365 Business Central with Outlook

Go from quote to cash within the flow of work

Interact with customers and vendors directly from Outlook to accelerate transactions and business decisions

Promptly manage inquiries, service requests, or process payments to accelerate the sales cycle

Get insights into customer history, previous discounts, and more without leaving Outlook



Dynamics 365 Business Central with Excel

Simplify daily tasks to free more time for strategy

Get up-to-date operational insights as Excel reports, and adapt quickly by customizing report layouts as Excel worksheets

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Export data from Business Central to Excel for efficient data entry, then publish back to Business Central with business rule validation

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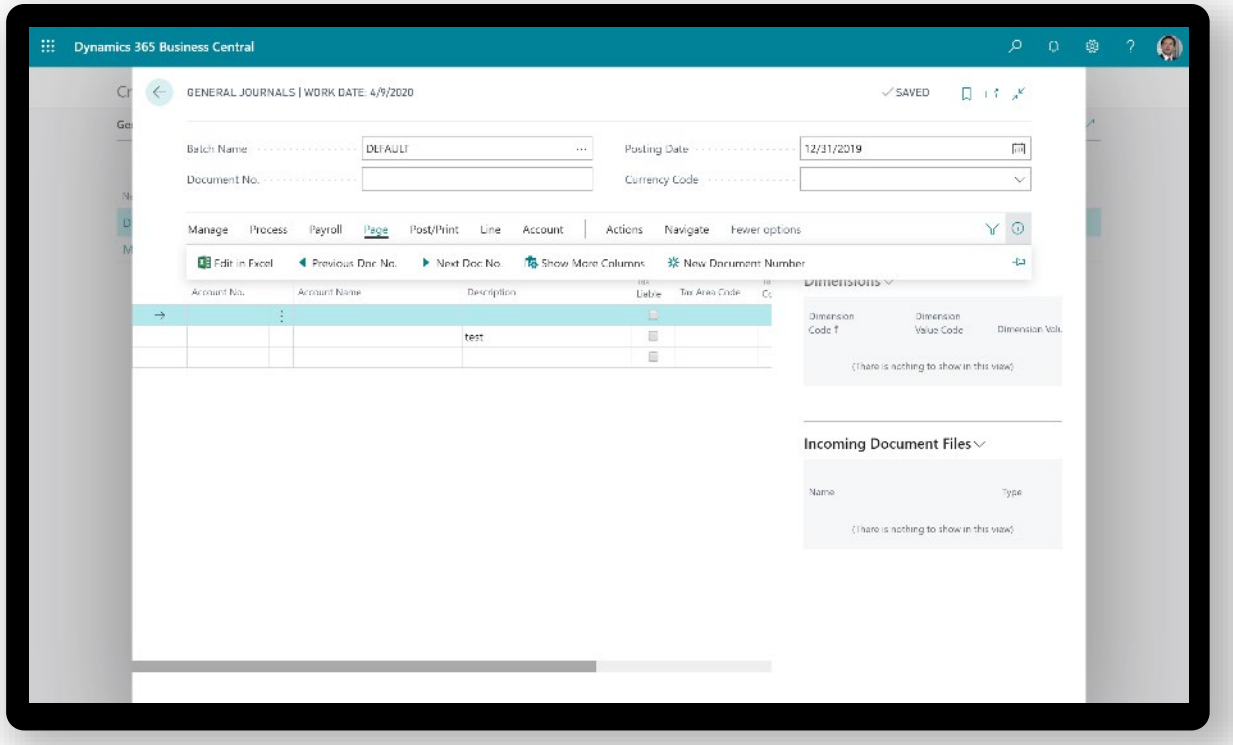
Easily analyze transactions using familiar Excel functionality, then share with the team for review and co-authoring



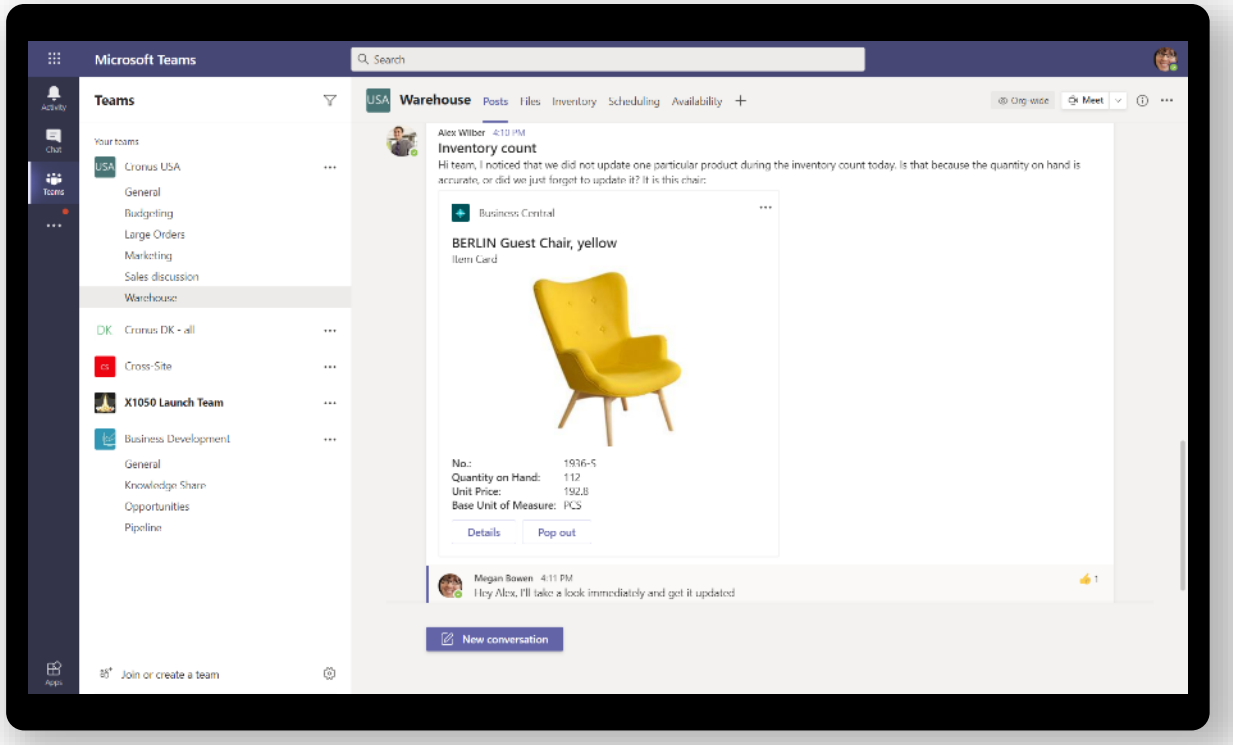
Dynamics 365 Business Central with Teams

Quickly share details so you can act faster

Make faster decisions by sharing Business Central data within Microsoft Teams chat or channel

Look up business contacts from Teams, along with insights, a history of interactions, and related records

Easily edit data and take action without switching apps

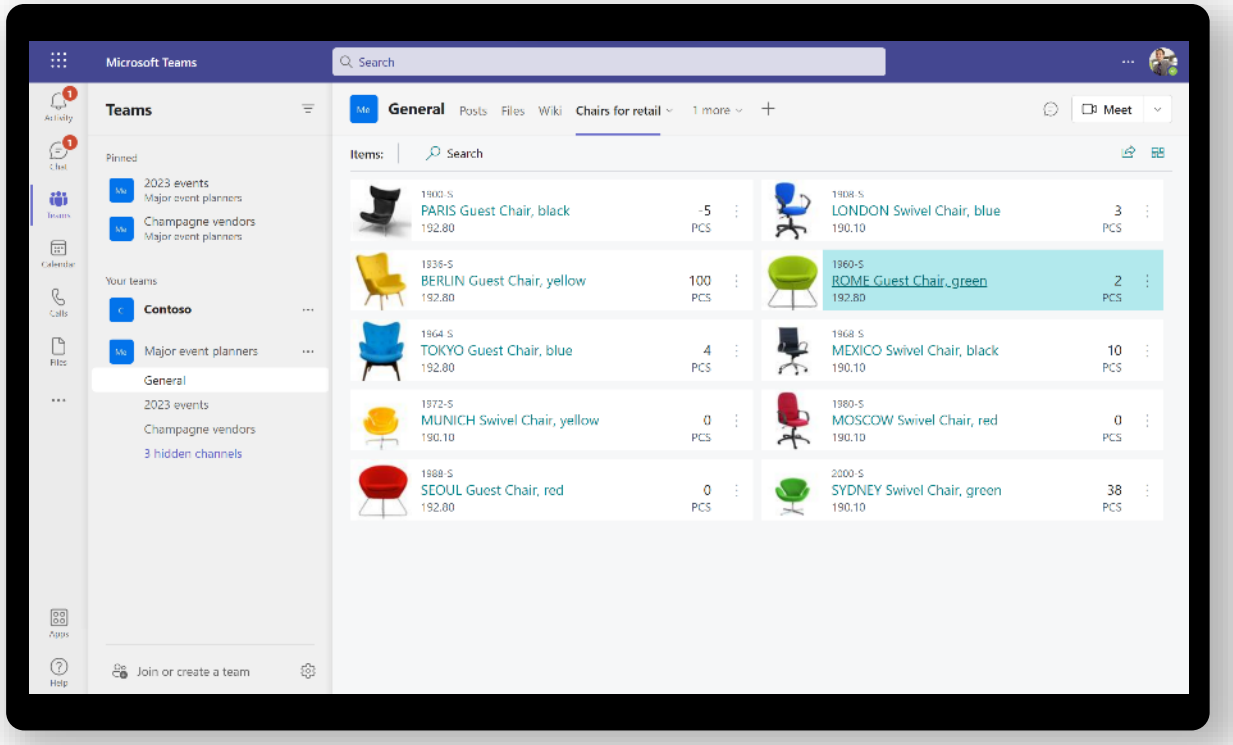


Access Business Central data with only a Microsoft 365 license at no additional cost*

Access Business Central cards and tables that have been shared with you in Teams

Unlock data, improve collaboration, and enhance decision making without buying additional Business Central licenses

Read-only access is granted through your Microsoft 365 license as configured by your admin



*Applies to Microsoft 365 licenses that include Microsoft Teams

Business Central integration with Dynamics 365 Sales

Dynamics 365
Business Central

Dynamics 365
Sales

Deeper sales capabilities: simplify and enhance your sales processes

100% Data visibility: manage back-end operations with Business Central and ensure real-time data insights with Dynamics 365 Sales

Streamlined order fulfilment: streamline your order fulfilment process and ensure smoother operations

Enhanced customer experience: enhance your overall customer satisfaction with the integration

Increased sales productivity: boost sales with the integration and combine data between systems

Business Central and Dynamics 365 Sales capabilities

- Couple data between systems or fully synchronize records
- Handle sales data such as sales orders and quotes, posted invoices, customer payments and sales prices
- Check for available product inventory directly from Sales
- Synchronize sales orders to Business Central for fulfillment, invoicing and payments
- Work with prices in different currencies by coupling the sales price list records

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Bridging the gap between Field Service and ERP systems

The division between Field Service and Enterprise Resource Planning (ERP) systems **has long presented significant challenges, including:**

- Lack of financial visibility
- Inefficient scheduling
- Delayed invoicing
- Data inconsistencies
- Costly and slow integrations

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Integration principles

Dynamics 365 Business Central

- Inventory management system
- Costing and pricing system
- Contracting system
- Invoicing system

Dynamics 365 Field Service

- Work Order management system
- Work Scheduling system
- Work Execution system

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Microsoft Dynamics 365

Dynamics 365 Business Central integration with Shopify

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When front- and back-end processes are not connected it inhibits growth and makes it difficult to adapt to disruptions and rapid change

- It is difficult to track inventory accurately across multiple locations and product variants
- Complying with tax regulations and other reporting requirements is complex and prone to errors
- It is challenging to forecast demand, managing supplier relationships, and control costs
- Production processes and service delivery are inefficient
- Setting competitive prices and managing discount strategies is challenging

The power of AI in Business Central

Copilot and the agentic ecosystem

Agents
(consumption-based pricing)

- Sales Order agent
- Payables agent
- More prebuilt agents coming soon
- Custom agents from Agent Builder, Copilot Studio, Azure Foundry, ISVs

Copilot in Business Central
(included)

- Analysis assist
- Chat with Copilot
- Summarize
- Marketing & Sales Suggestion
- Bank account reconciliation

Copilot Extended

- Microsoft 365 Copilot
- Copilot Studio
- Power Automate
- Azure AI Foundry
- Power Apps

...and more

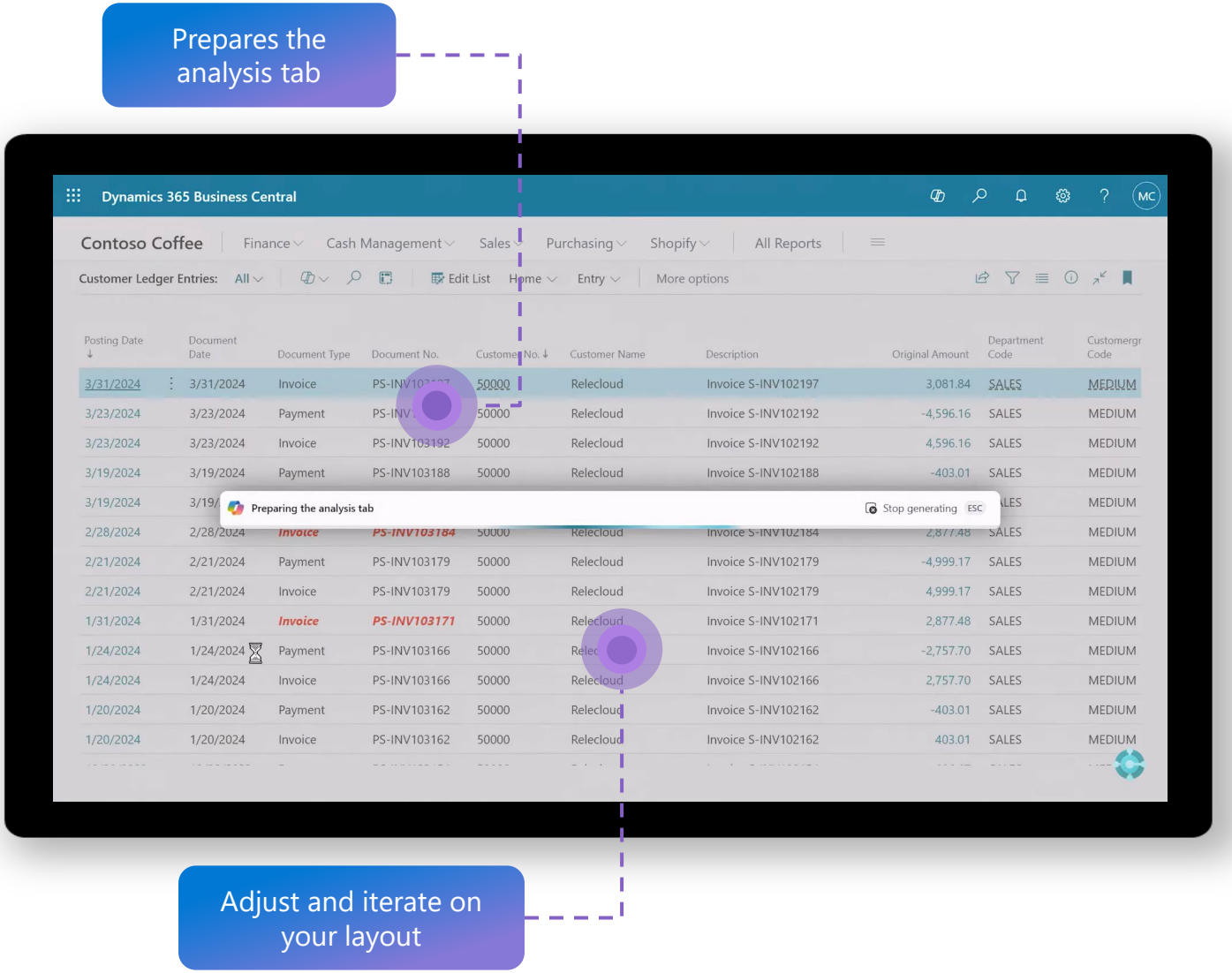
Copilot in Business Central

Get to key insights faster

Copilot simplifies analysis by transforming raw data into insightful summaries using next generation AI

Provides an interactive and versatile way to calculate, summarize, and examine data

Creates, totals, pivots, and filters to help you find the information you're looking for



Chat with Copilot

Use natural language to interact with Copilot

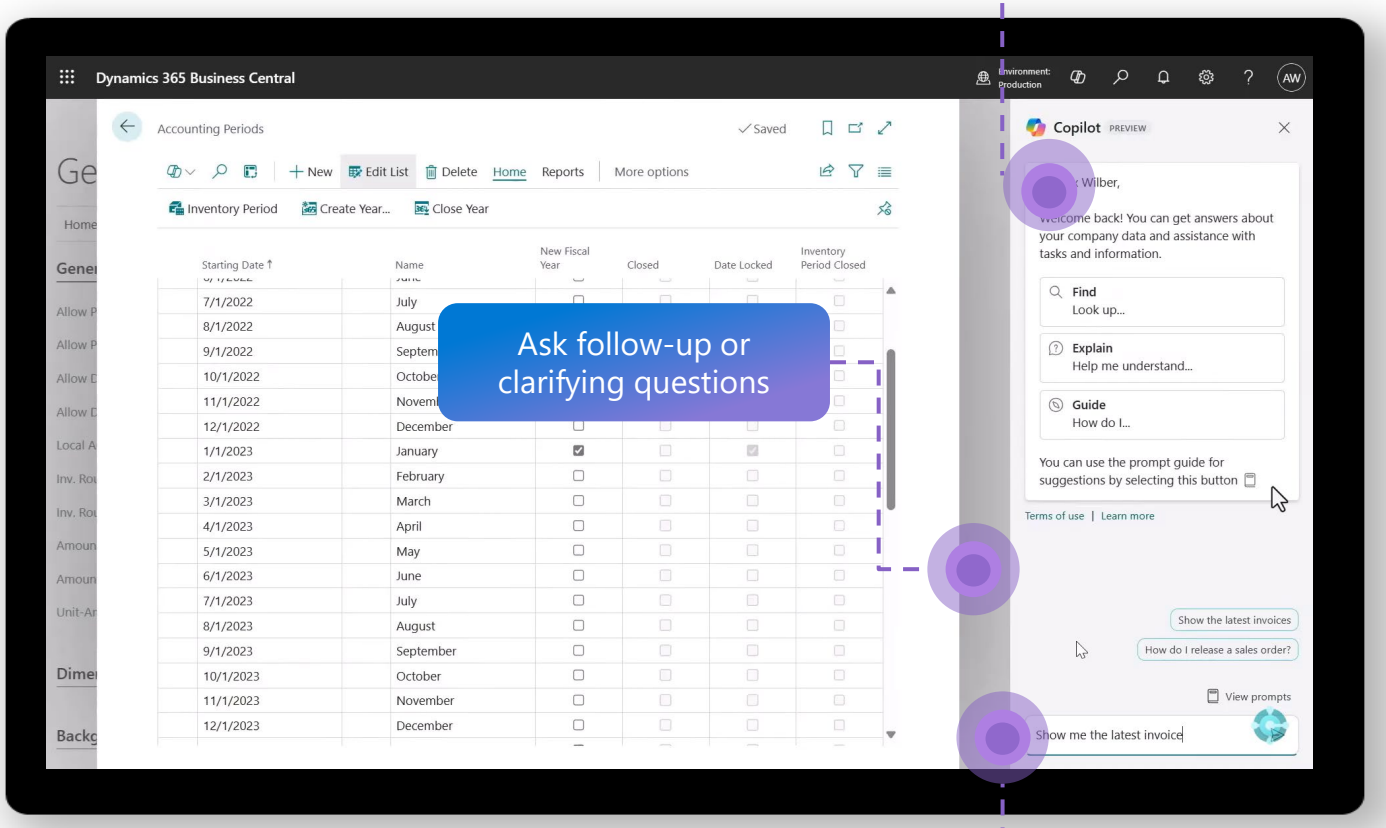
Copilot acts as a virtual assistant, helping you track down the right information at the right time

Finds business data for your company in Business Central

Gives explanations or step-by-step guidance on various tasks

Helps you understand the purpose and typical use of individual fields

Finds records or pages, or explains how to do things



Ask follow-up or clarifying questions

Express yourself in your own words

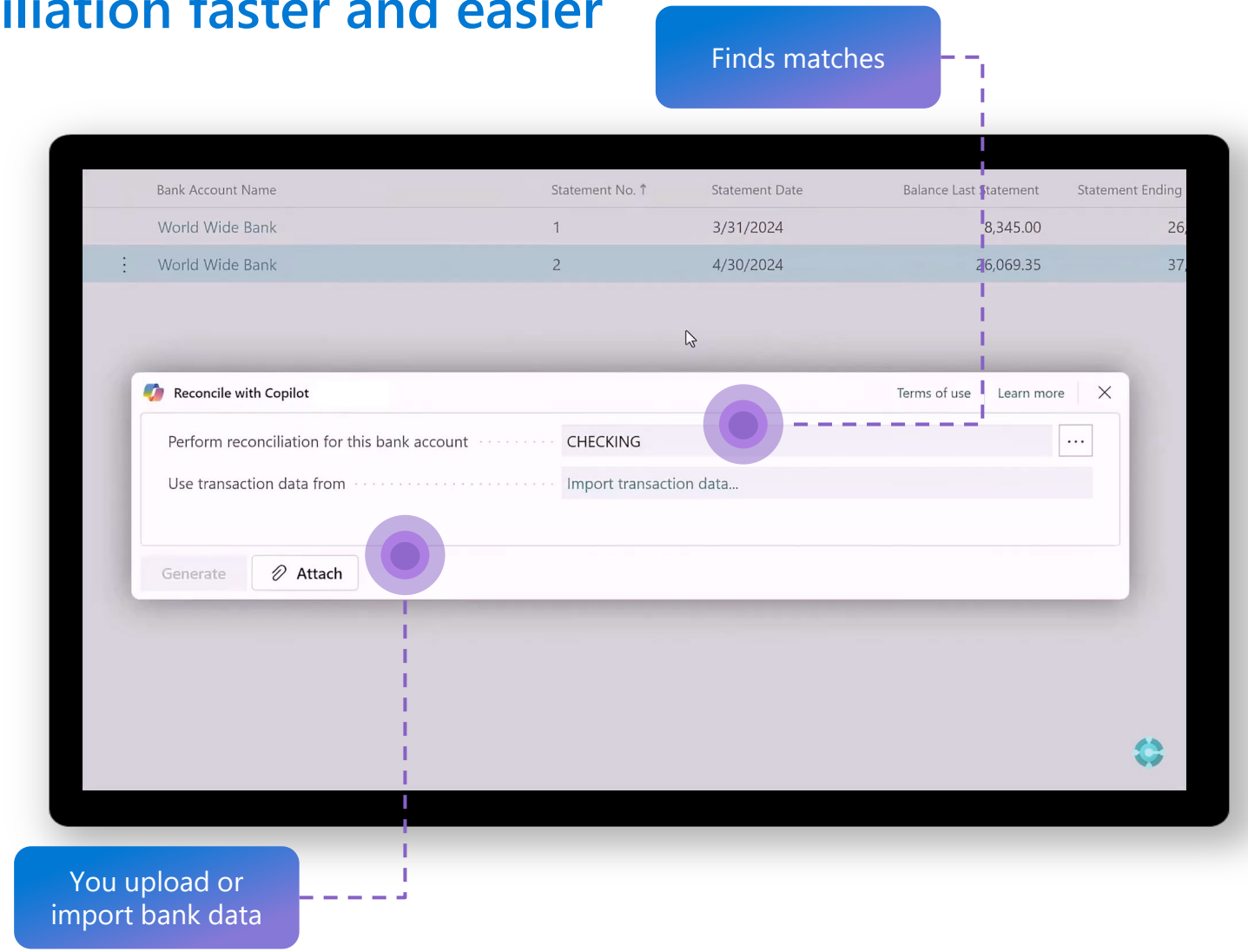
Bank reconciliation with Copilot

Solve the puzzle of bank reconciliation faster and easier

Copilot is your AI-powered bookkeeping assistant that helps you turn a tedious monthly chore into a quick review

Finds matches with your ledger entries, even when multiple charges are consolidated into a single entry

Suggests matching ledger accounts to post new transactions to.



Microsoft Dynamics 365

Agents in Microsoft Dynamics 365 Business Central

Types of agents in Business Central

Agents are AI assistants that can help optimize business processes and enhance productivity using large language models and generative AI

Use built-in agents

Use built-in agents in Business Central, working independently under your directions to streamline your workflows and drive efficiencies

Build your own agent

Connect to your data in Business Central and publish on channels such as Microsoft Teams or your website

Level 1

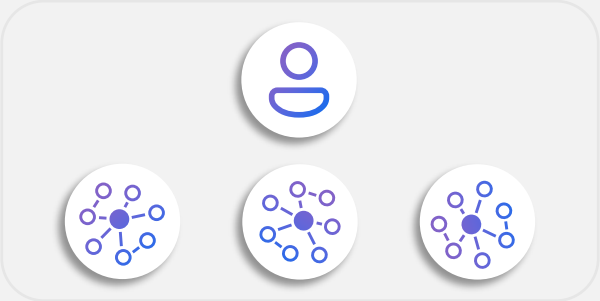
Level 2

Level 3

Human with an assistant

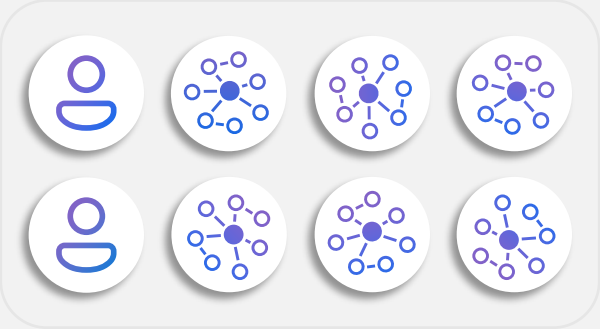
Every employee has an AI assistant that helps them work better and faster

Human-agent teams



Agents join teams as “digital colleagues,” taking on specific tasks at human direction

Human-led, agent-operated



Humans set direction and agents execute business processes and workflows, checking in as needed

Level 1	Level 2	Level 3
Human with an assistant	**Human-agent teams**	**Human-led, agent-operated**
Chat Autofill E-document matching Bank account reconciliation Suggest GHG emissions Summarize...and many more	Sales Order Agent Payables Agent ... more to come!	
Every employee has an AI assistant that helps them work better and faster	Agents join teams as “digital colleagues,” taking on specific tasks at human direction	Humans set direction and agents execute business processes and workflows, checking in as needed

Agents in Business Central

Sales Order Agent

Communicates with customers

Interprets customer request

Sends quotes

Creates sales orders

Payables Agent

Receives vendor invoices

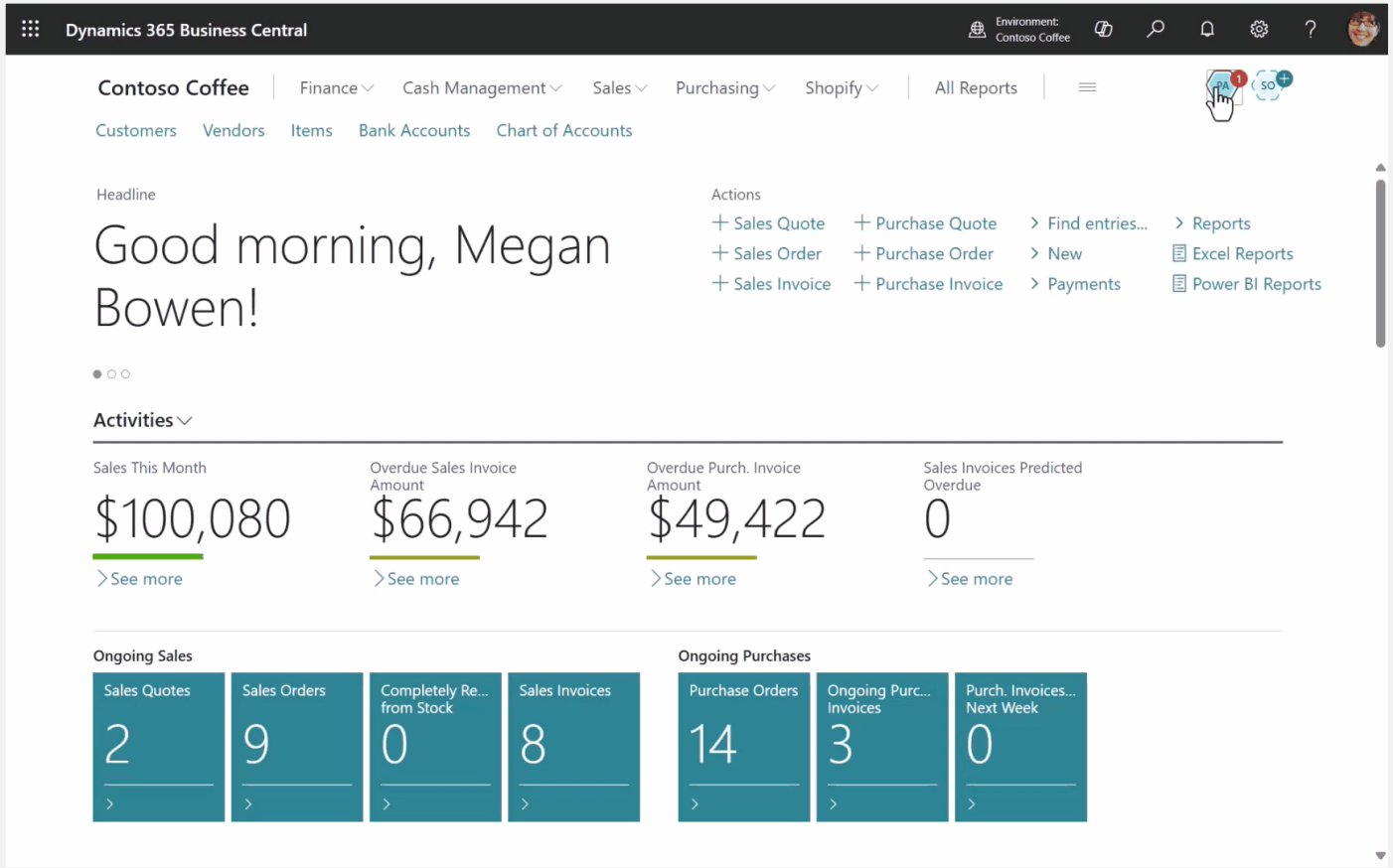
Captures invoice information

Registers invoices according to preference, and purchase invoice history

Accounts Payable is the backbone of quality data

Payables Agent

The first line of defense against bad data, inaccurate reporting and time-consuming rework



The bottlenecks in AP that slow down business performance

Manual data entry

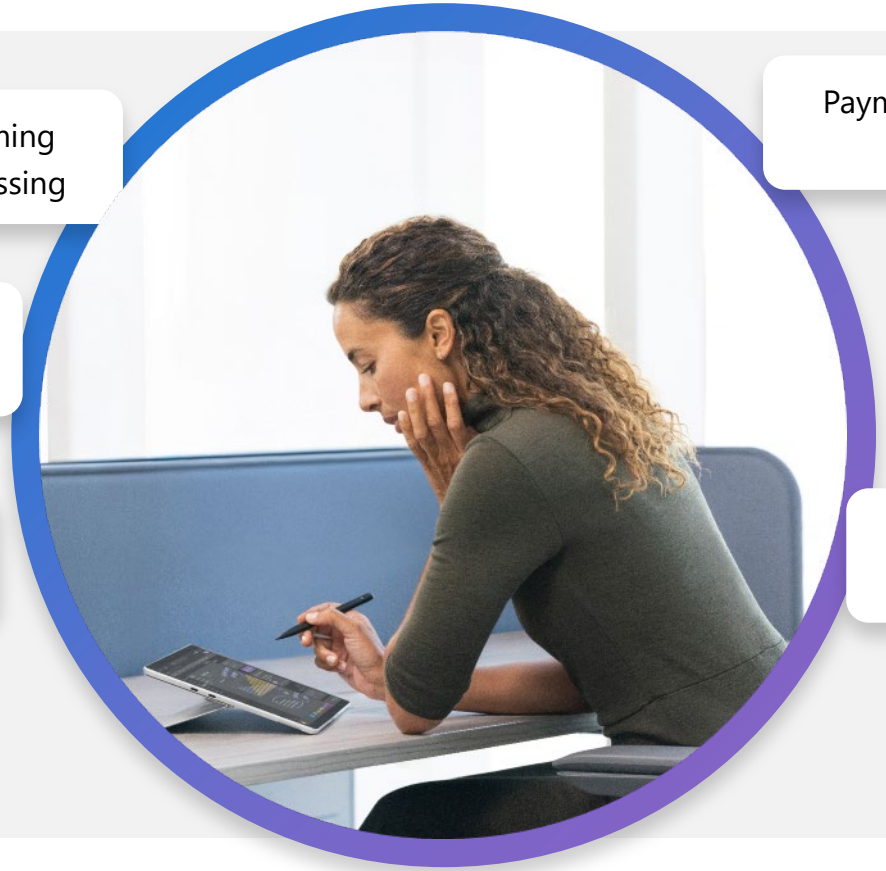
Time-consuming invoice processing

Order matching issues

Approval delays

Inaccurate vendor records

Handling disputes inefficiently



Payment scheduling issues

Compliance readiness issues

Difficulty avoiding late fees

Outstanding liabilities

Limited insights into metrics

Issues with audit trails

The Payables Agent solves a decade-old challenge...

Eliminates errors

Errors in Accounts Payables (AP) cause time-consuming corrections in G/L and faulty financial statements.

Handles manual entry

Month-closing is a hassle when invoice dating is not handled right.

Ensures compliance

Staying on top of internal and external compliance can be stressful.

Helps make the right decisions

Risk of poor business decisions increases when financial data is not in order.

The Payables Agent solves a decade-old challenge…

Eliminates errors

Payables Agent assists with coding invoices correctly and helps prevent and catch errors early.

Handles manual entry

Payables Agent assists with landing expenses in the proper period.

Ensures compliance

Payables Agent assists with adhering to the company's way of handling invoices, and learns from changes in posting behavior, always with agent supervisors in control.

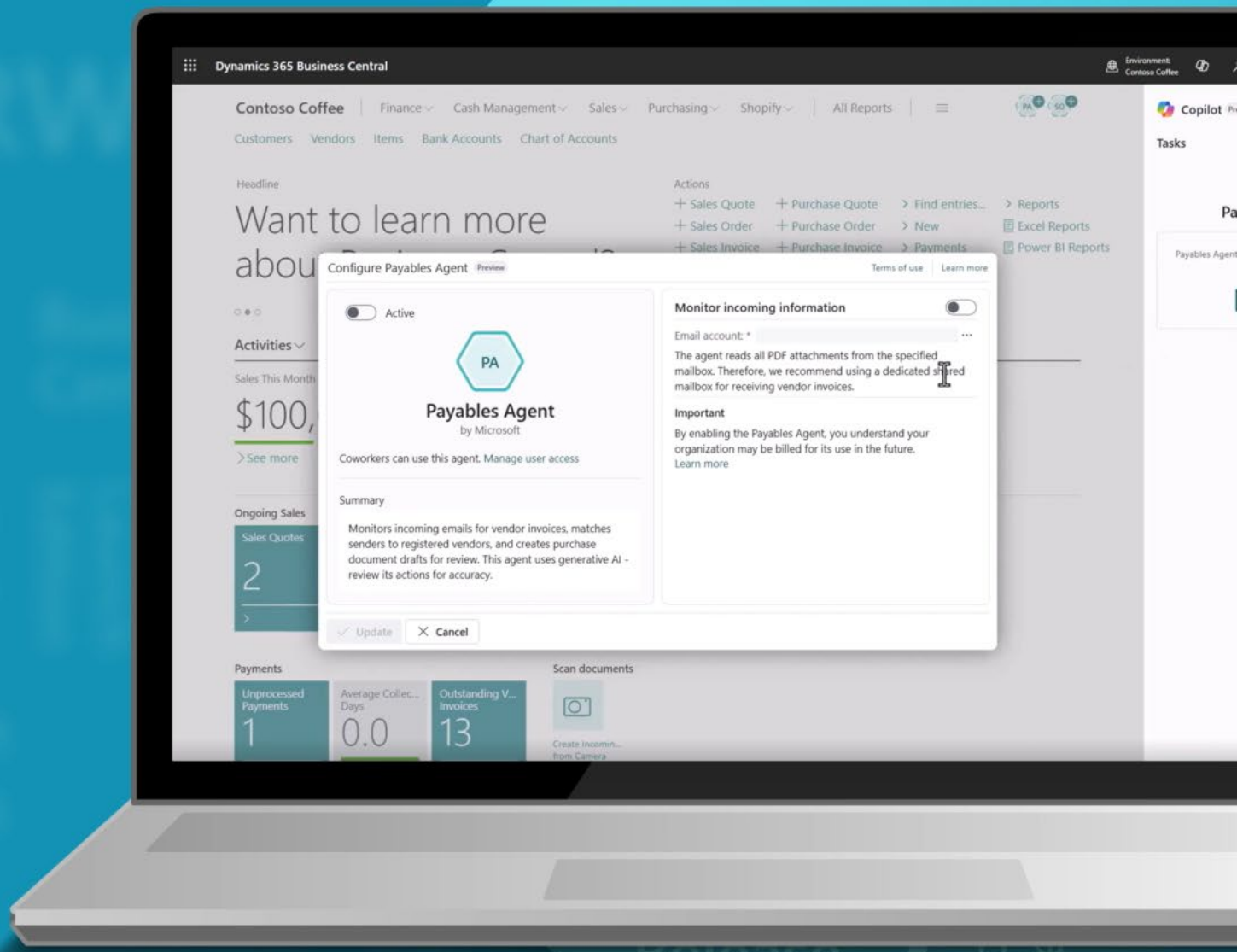
Helps make the right decisions

Payables Agent helps with 3-way purchase order matching, to ensure invoices for inventory or services are aligned to what's been ordered.

Microsoft Dynamics 365

Transform vendor invoice processing with the Payables Agent

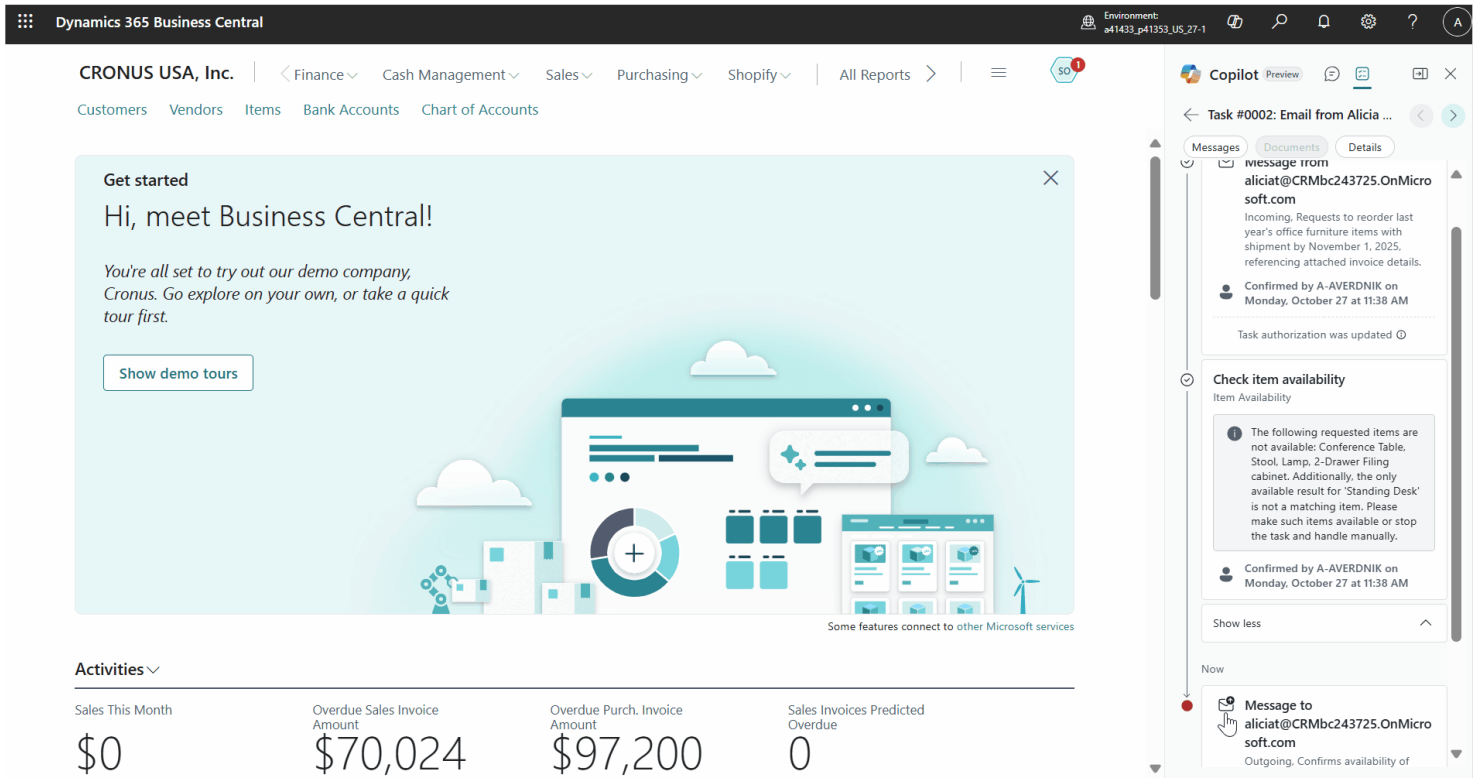
Business Central 2025 release wave 2



Streamline your order processing

Sales Order Agent

Handling unstructured and varied sales inquiries on its own, so you spend less time on manual tasks and respond faster



Where sales order fulfillment gets stuck

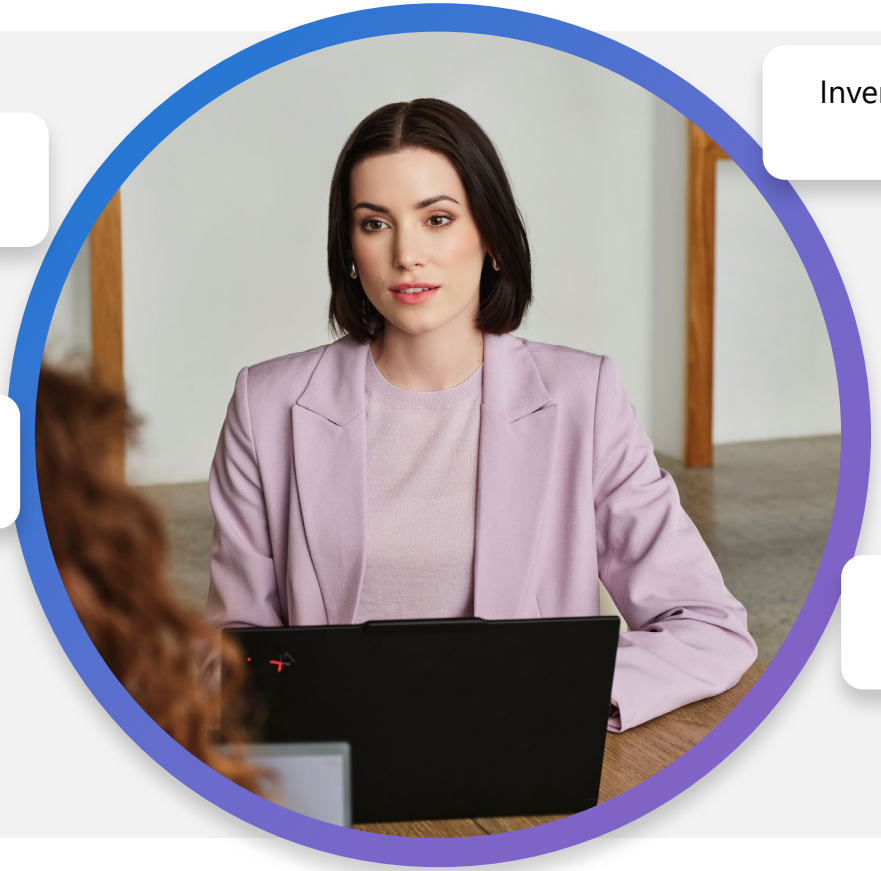
Handling incomplete data

Manual data entry

Order processing errors

Lost sales opportunities

Poor customer communication



Inventory availability errors

Delivery timelines issues

Lack of scalability

Manual email processing

Limited visibility

The Sales Order Agent transforms sales order management

Automates high-volume sales inquiries

Manual handling of high-volume inquiries is time-consuming and prone to delays.

Improves accuracy and efficiency

Errors occur when processing incomplete or unstructured data manually.

Seamless natural language interaction

Traditional systems require rigid input formats, causing workflow interruptions.

Enhances customer responsiveness

Delays in confirming availability or alternative delivery dates frustrate customers.

The Sales Order Agent transforms sales order management

Automates high-volume sales inquiries

Sales Order Agent handles high-volume and varied sales requests autonomously, reducing manual effort and speeding up response times.

Improves accuracy and efficiency

Sales Order Agent processes unstructured or incomplete inputs with high precision and engages in multi-turn email conversations to clarify requests if important details are missing.

Seamless natural language interaction

The agent accepts natural language guidance, reducing workflow disruptions and enabling smooth, multi-turn conversations that lead to completed sales orders.

Enhances customer responsiveness

The agent automatically processes emails from customers and provides advanced item availability responses, including capable-to-promise options, alternative delivery dates and alternative product options.

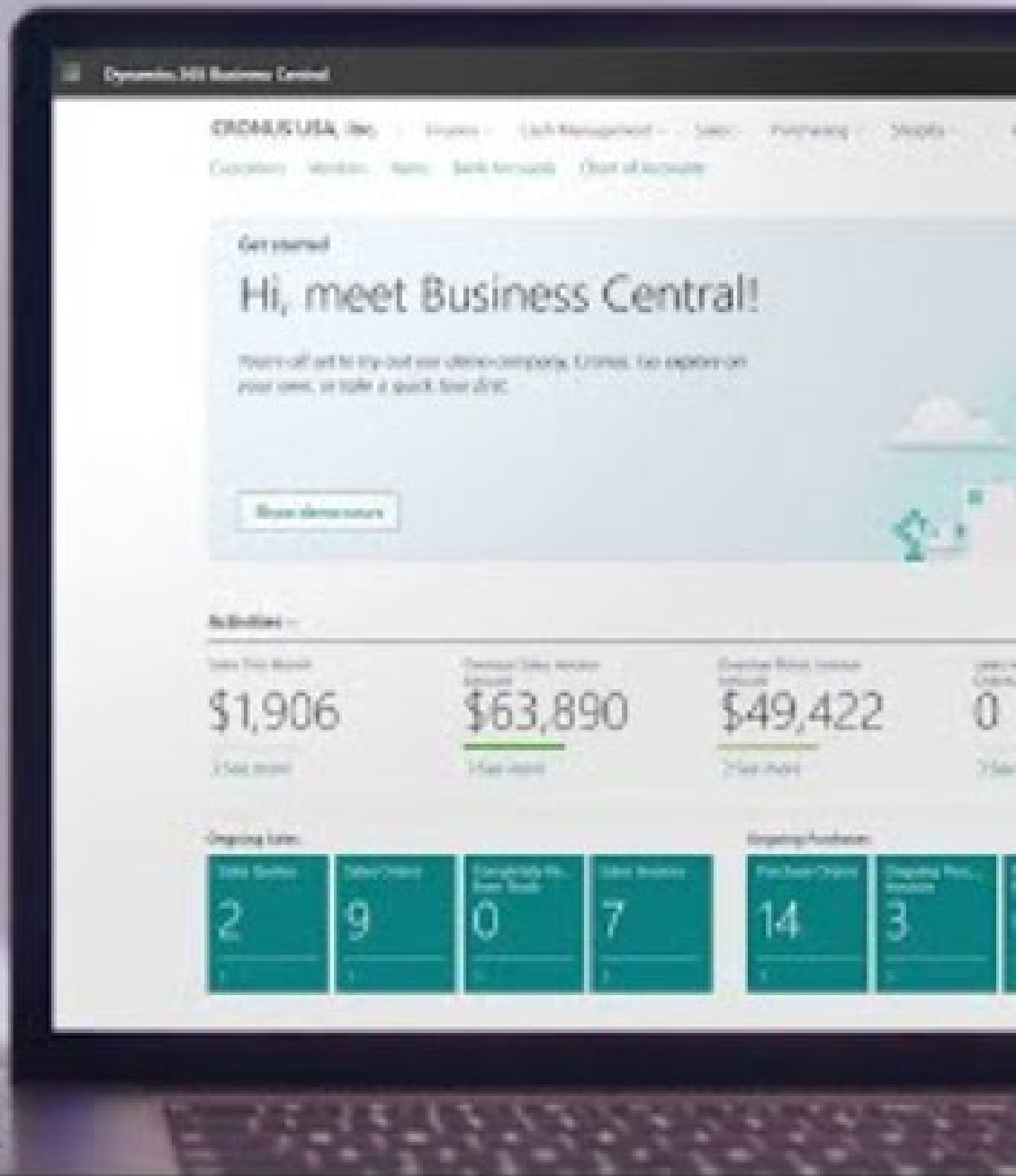
Sales Order Agent

Uses AI to automate the full process of **capturing sales quotes and orders** from customers' requests expressed in **natural language**

- Receives and analyzes customers' requests via e-mail
- Detects and deflects irrelevant and malicious e-mail content
- Checks available inventory, unit of measure, attributes, variants
- Can be triggered automatically and on demand, once email is received
- Engages in multi-turn e-mail conversations with the customer to clarify the request or discuss availability
- Automatically resolves validation errors where possible
- Creates and updates sales quotes with requested items, configured pricing and delivery dates
- Acts within defined permissions and profile (role)
- Composes emails with sales quote as attachment and share it in the same e-mail thread
- Brings humans in the loop to validate key decisions
- Converts sales quotes to a sales orders upon salesperson or customer confirmation

Dynamics 365

Sales Order Agent



Microsoft Dynamics 365

Dynamics 365 Business Central checks all the boxes…

… with benefits ONLY Microsoft can provide

- **Cloud-based** with remote access across mobile devices
- **Deep functionality** with built-in best practices that improve processes across the business
- **Open architecture** easily connects with existing systems
- **Highly customizable** to meet industry or vertical needs with pre-built apps
- **Robust, flexible reporting and analysis** to drive business performance and improve decision-making
- **Rapid to deploy and easy to use** so you can realize business value quickly
- **Microsoft 365 applications** work natively with Business Central, boosting productivity and improving collaboration
- **Microsoft Copilot and Agents** lead in AI innovation so your business can adapt faster, work smarter, and perform better
- **Microsoft delivers world-class security, performance and scale** to support your business now and as it grows

Get started with agents

1. Get Agent resources and important links — aka.ms/BCAgents
2. Watch new Sales Order Agent and Payables Agent videos — aka.ms/BCAgentSizzle
3. How to get started with Agents (playlist) — aka.ms/BCStartAgent
4. Agent capabilities and sizzle reels (playlist) — aka.ms/BCAgentBuzz

Let’s get started

- Explore with a trial and self-guided tour
- Schedule an in-depth discovery session