CONVERGENCE | AI + ERP

MIAMI | 2025

Integrating Business Central with Microsoft 365, Dynamics 365 and Power Platform

...

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Agenda

Integration to M365 (Excel, Outlook, Teams, Word)

Integration with Dynamics 365 Sales and Field Service

Integration with Power Platform

Integration with Shopify

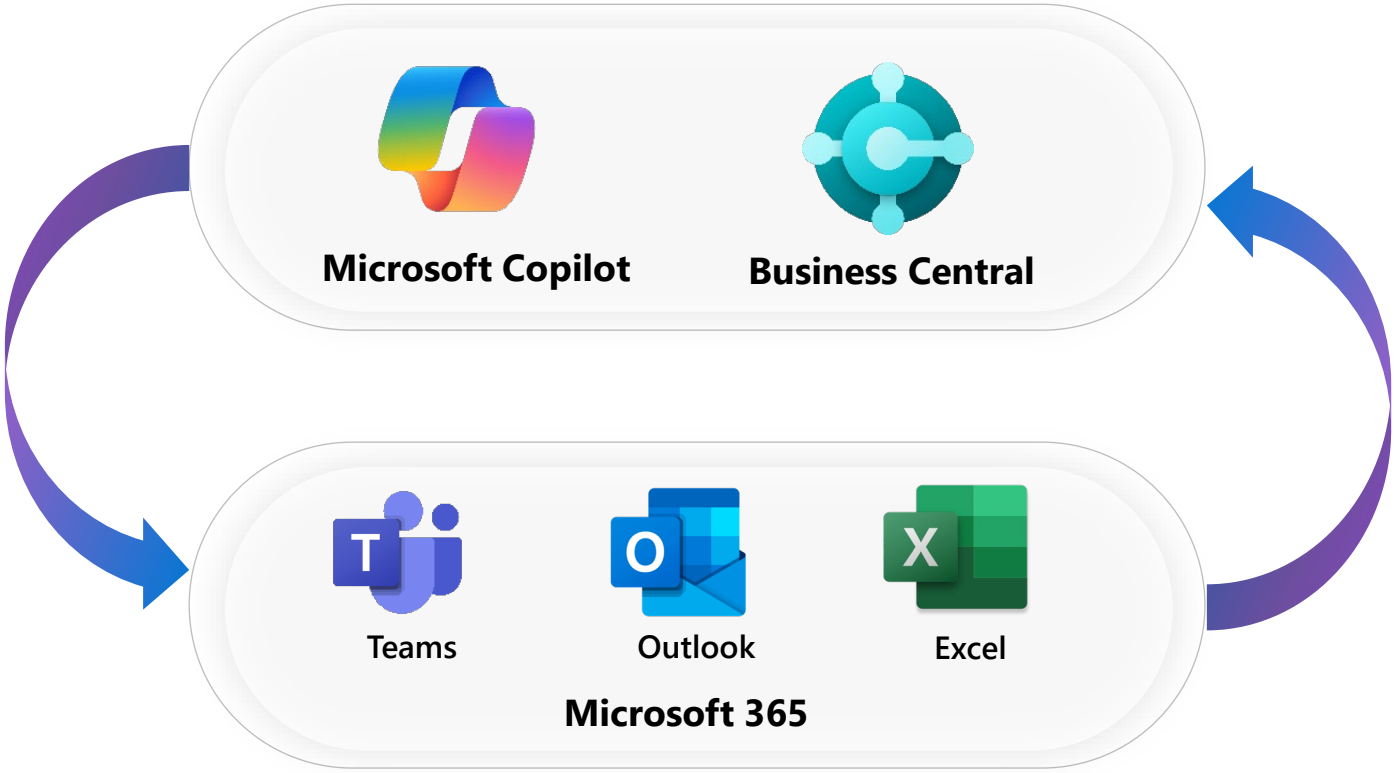
Work smarter with Copilot in Business Central and connect it with Microsoft 365 apps

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

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

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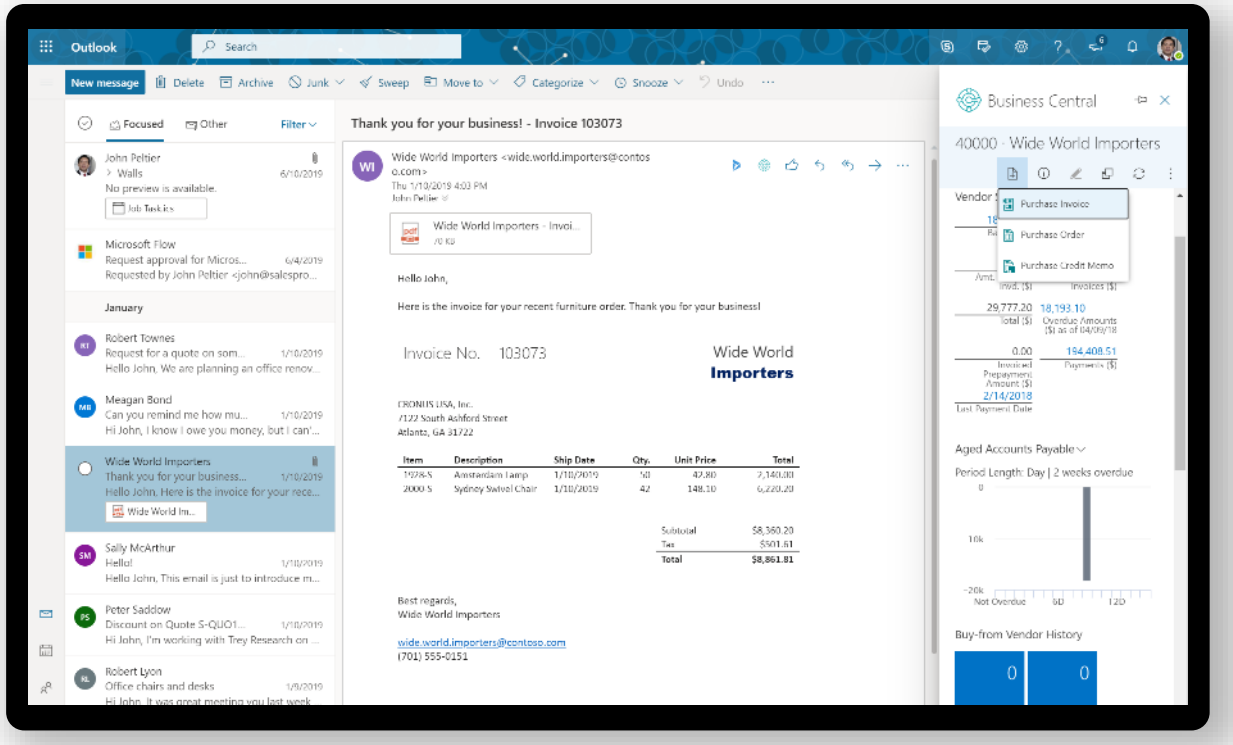
Get insights into customer history, previous discounts, and more without leaving Outlook



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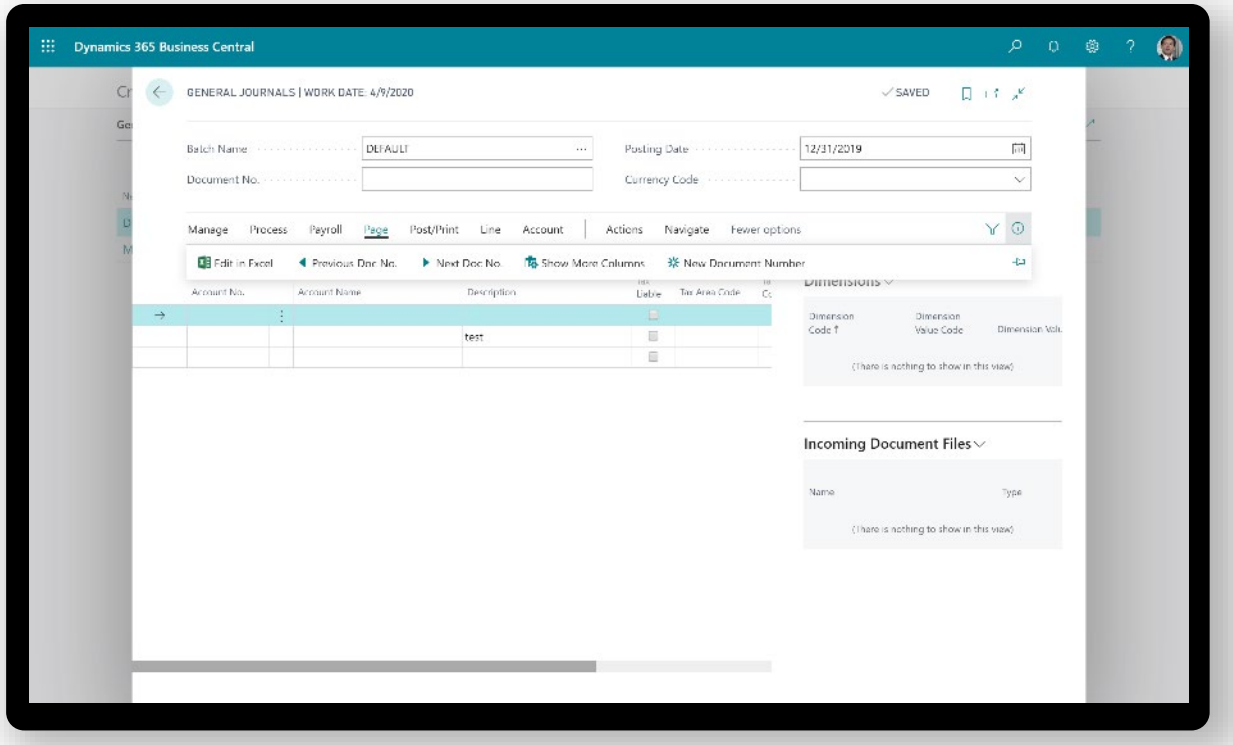
Easily analyze transactions using familiar Excel functionality, then share with the team for review and co-authoring



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

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

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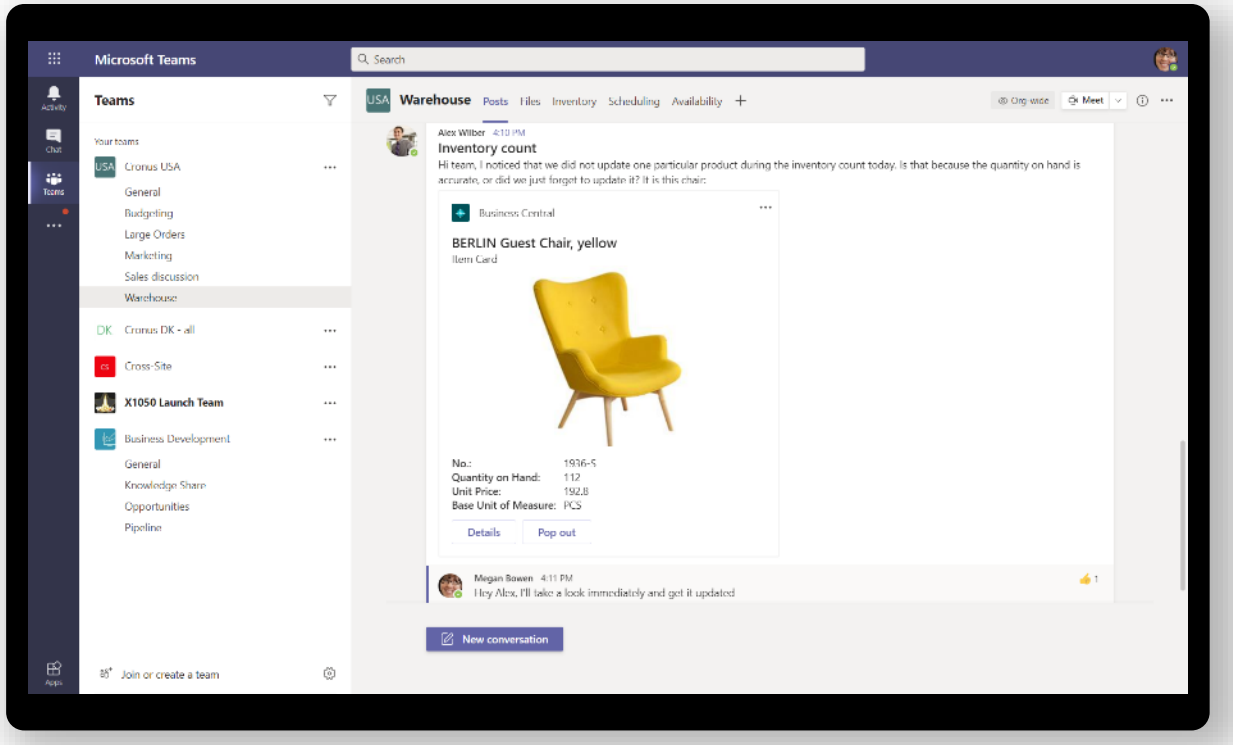
Easily edit data and take action without switching apps

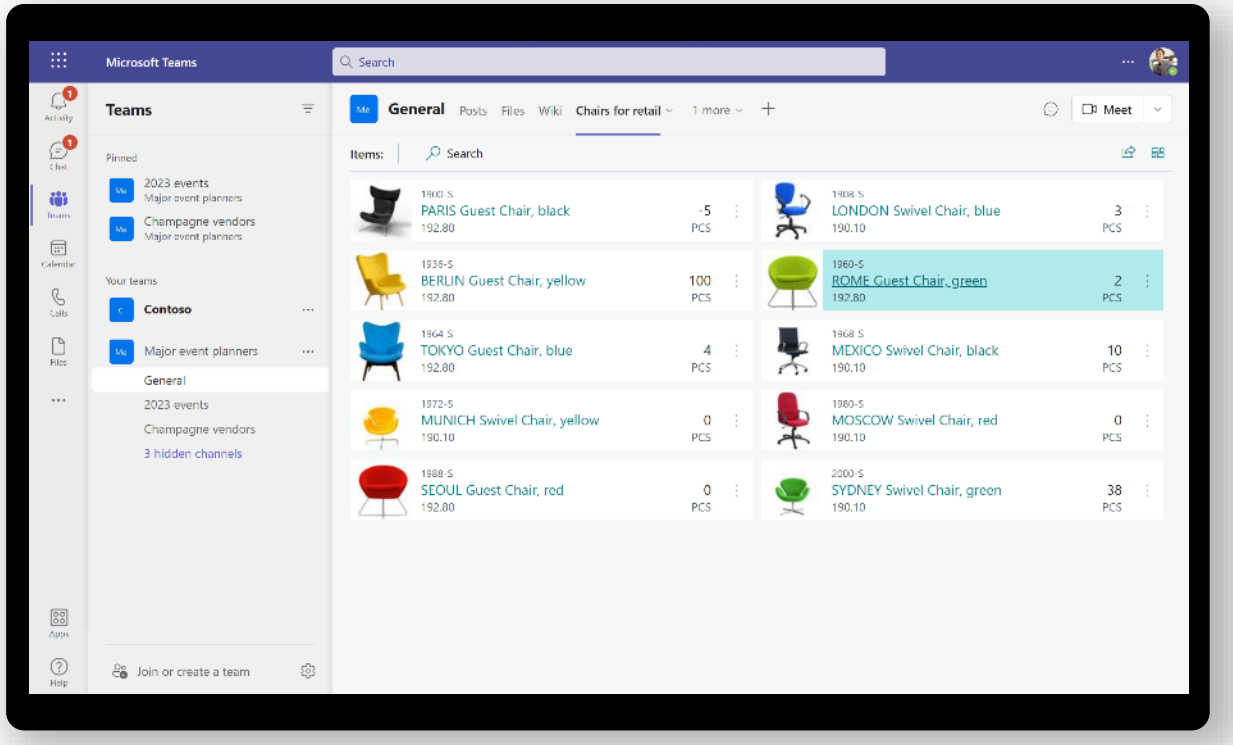


Access Business Central data with only a Microsoft 365 license at no additional cost*

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

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

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

Microsoft Dynamics 365

Dynamics 365 Business Central integration with Shopify

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

Two types of integration

Choose the level of integration that matches your requirements

Projects: Integrates resources, projects and projects tasks from Business Central to bookable resources, external project tasks and work orders in Field Service

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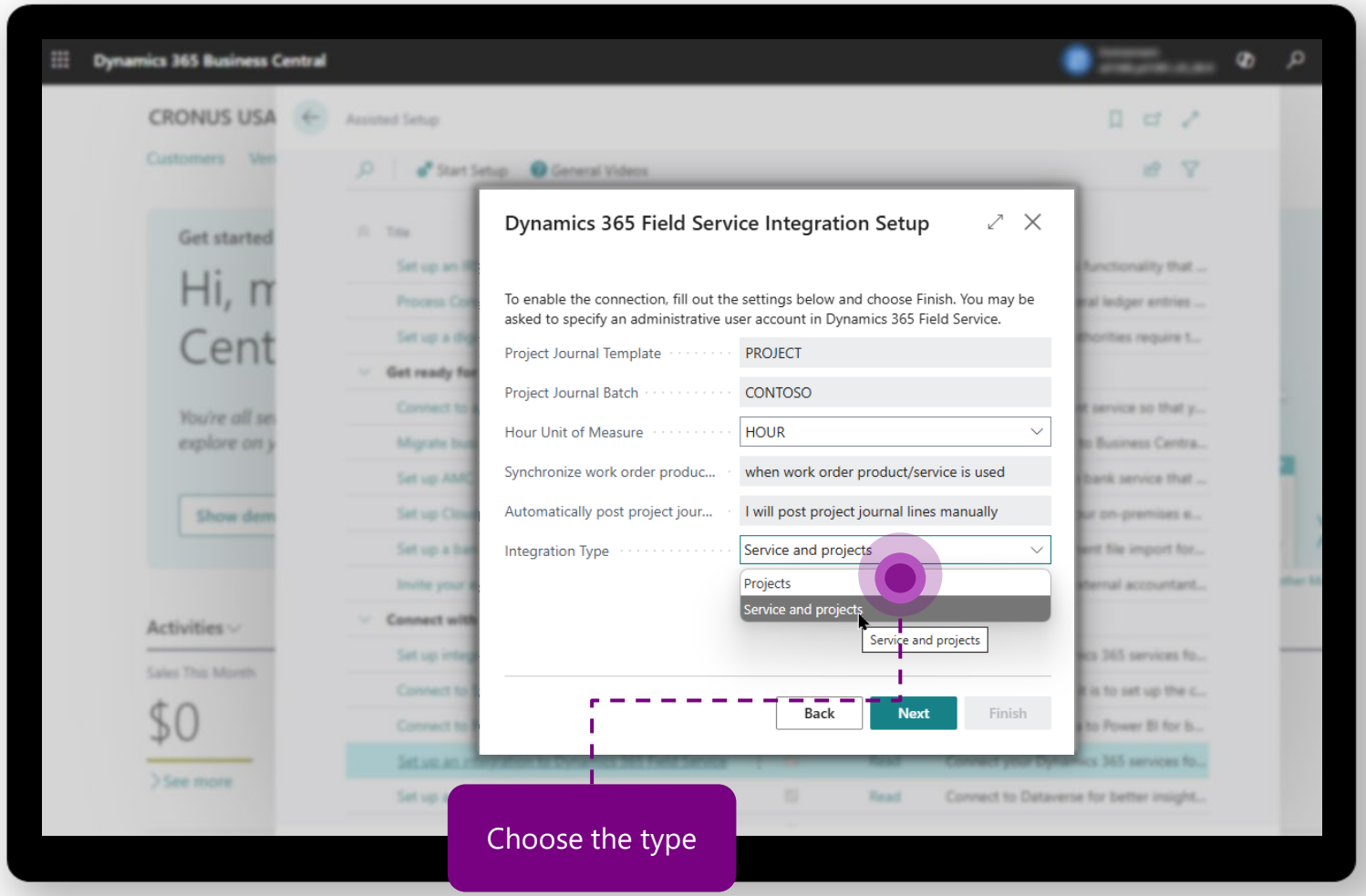
Service and projects: Additionally integrates service items, service orders and inventory availability to work orders and customer assets



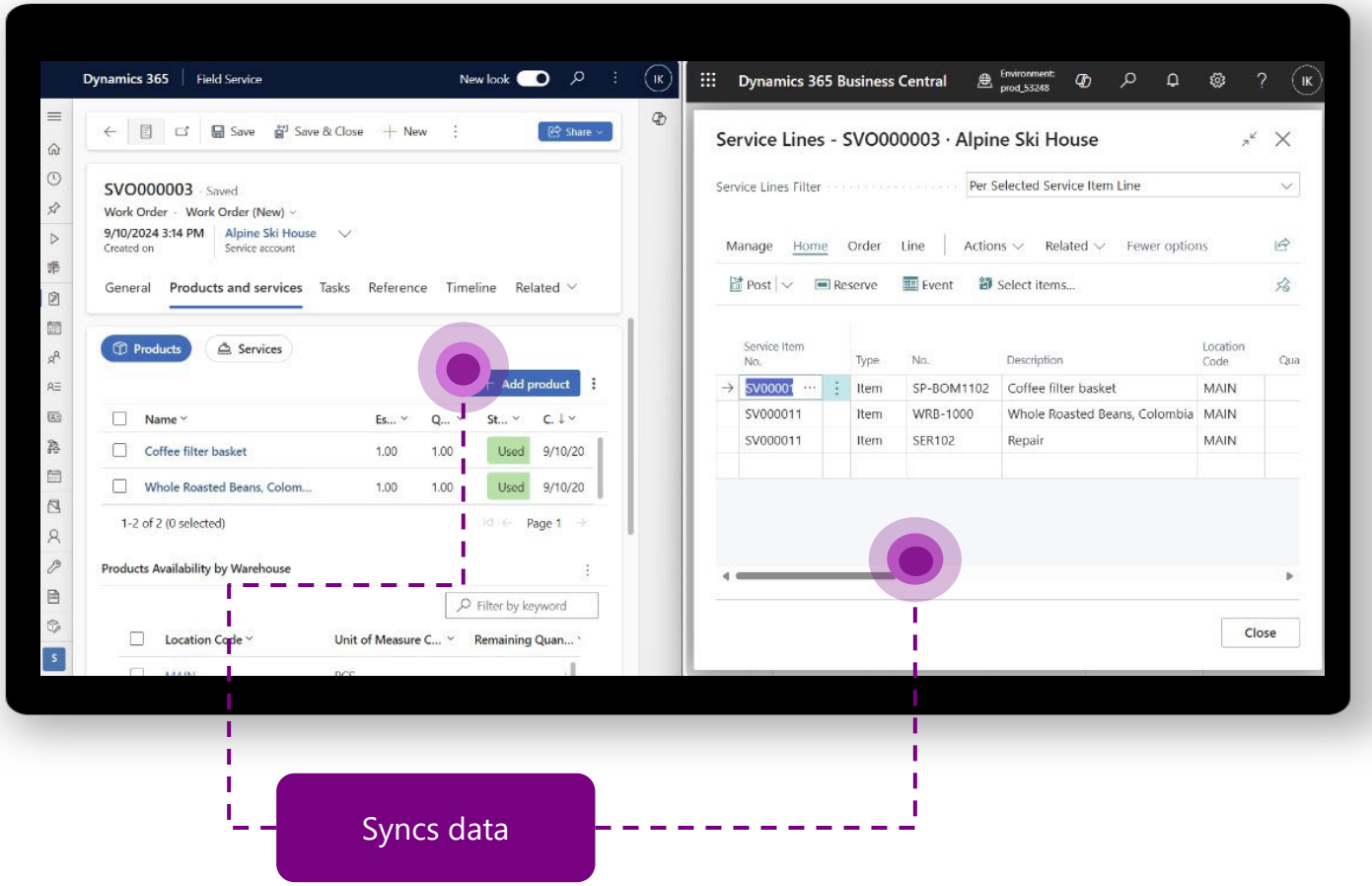
Service and work order alignment

Seamlessly integrated solution to benefit your workers

Bidirectional synchronization of service orders and work orders

Service item lines aligned with work order incidents

Service lines aligned with work order products and services



Syncs data

Inventory availability in Field Service

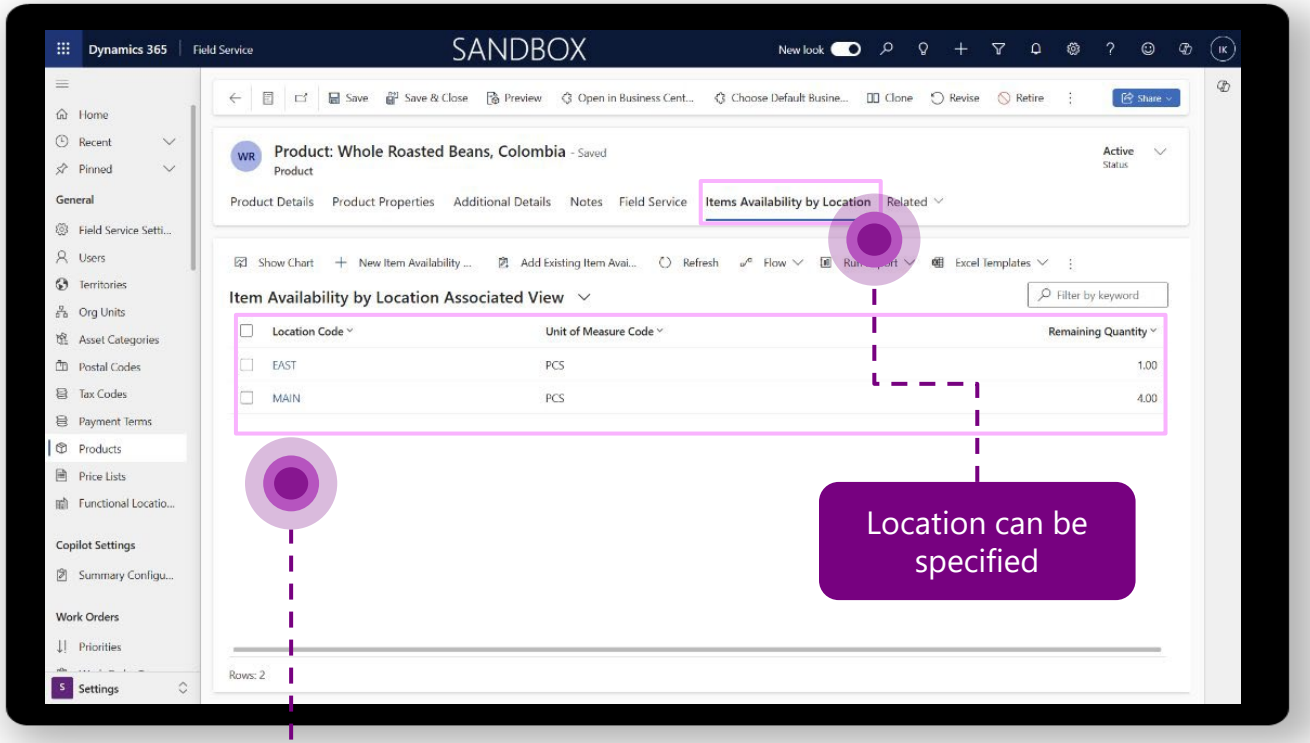
Optimize work order scheduling, service, and purchasing operations.

Location to warehouse mapping

- Unidirectional synchronization
- Excludes in-transit locations
- Excludes locations with warehouse pick mandatory

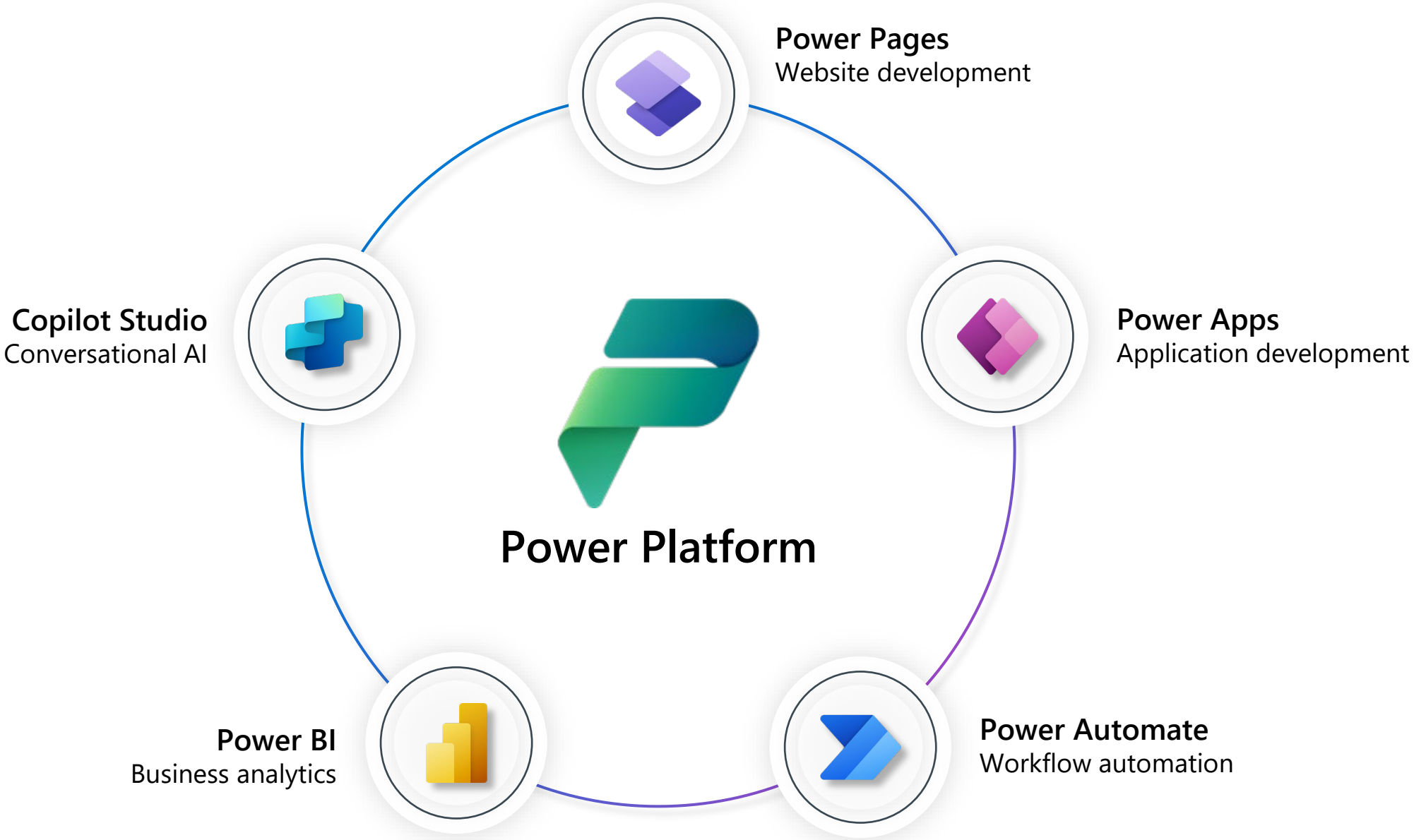
New item availability by location API

New synthetic relation added between products and item availability

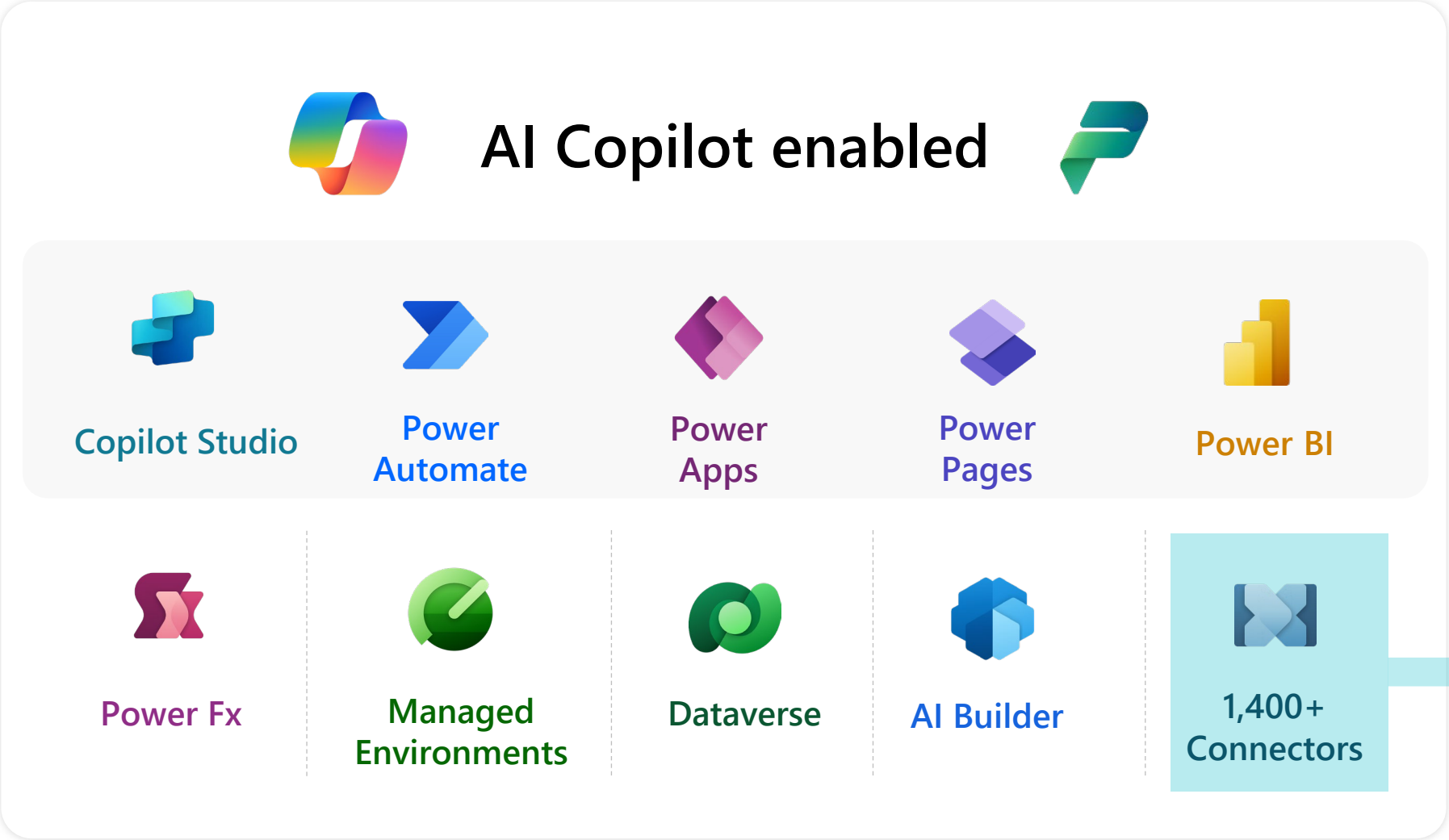


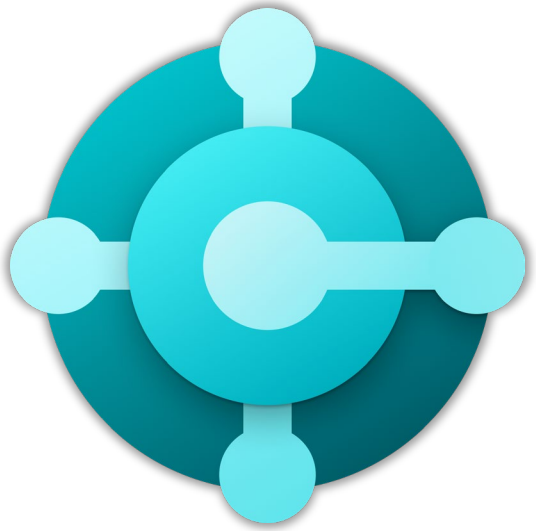
Microsoft

Power Platform integration with Dynamics 365 Business Central

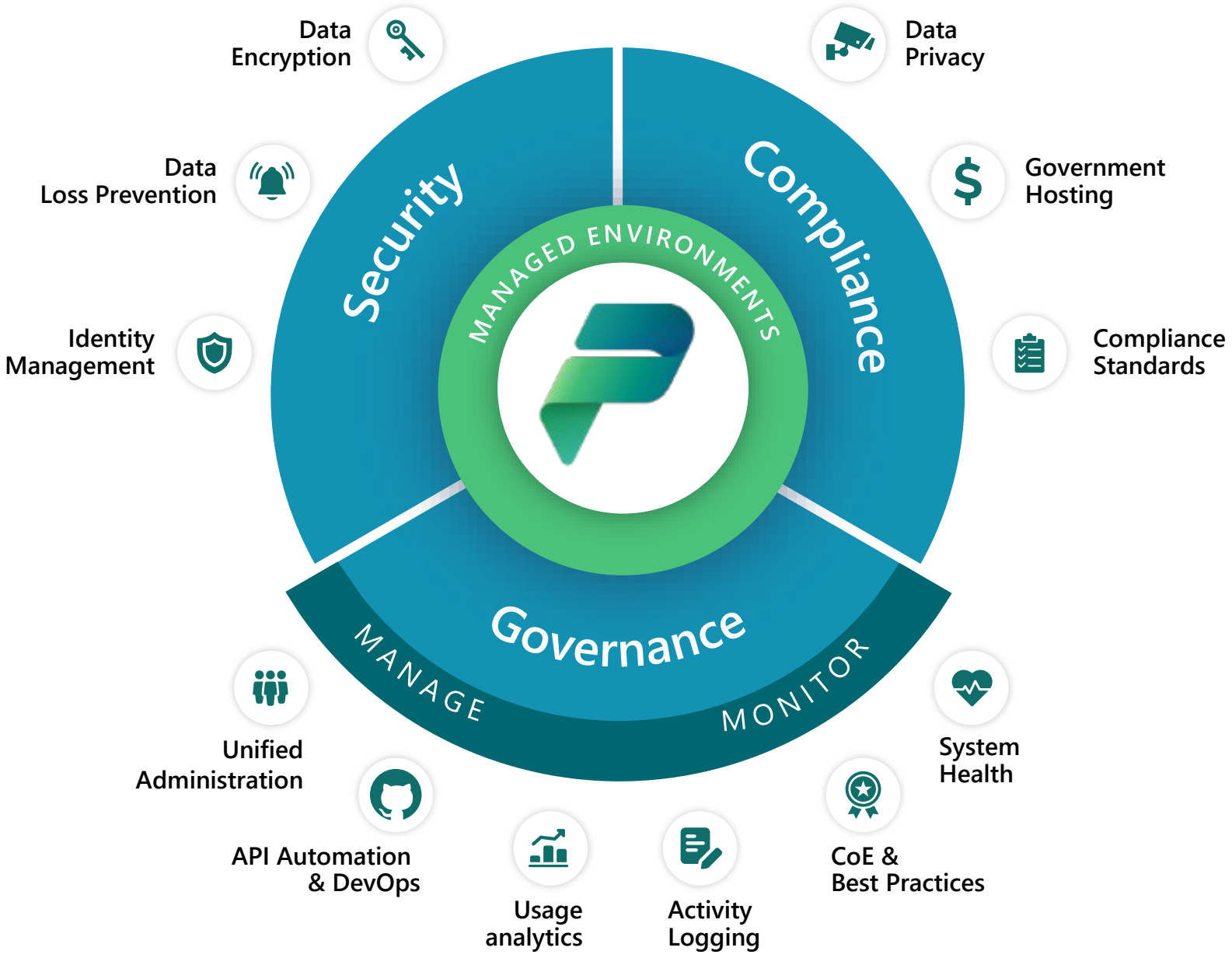

Power Pages
Website development
Power Apps
Application development
Power Automate
Workflow automation
Power BI
Business analytics
Copilot Studio
Conversational AI
Power Platform

Microsoft Power Platform





Unmatched governance and security controls at scale



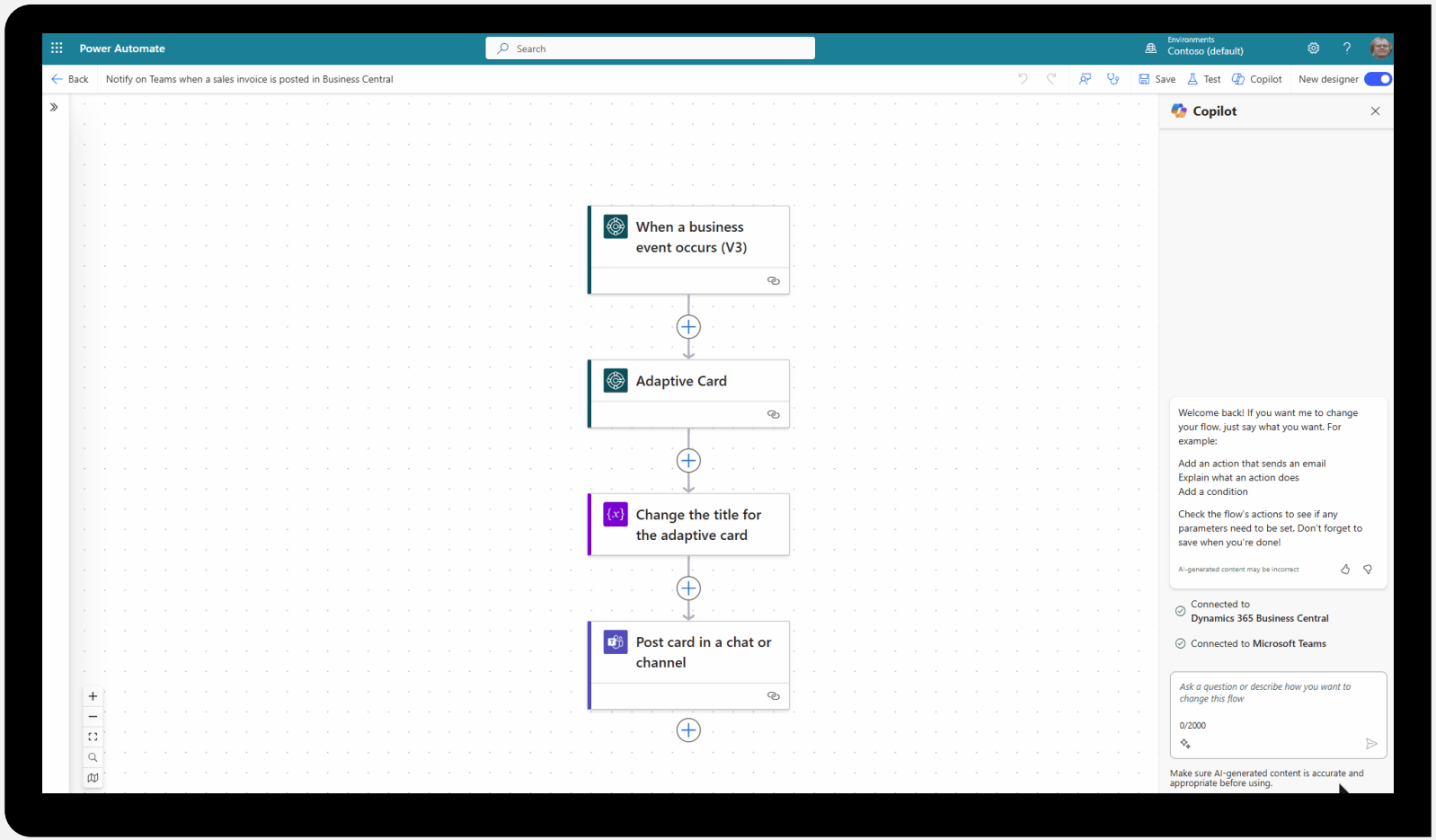
Power Automate

Boost productivity for everyone with Power Automate

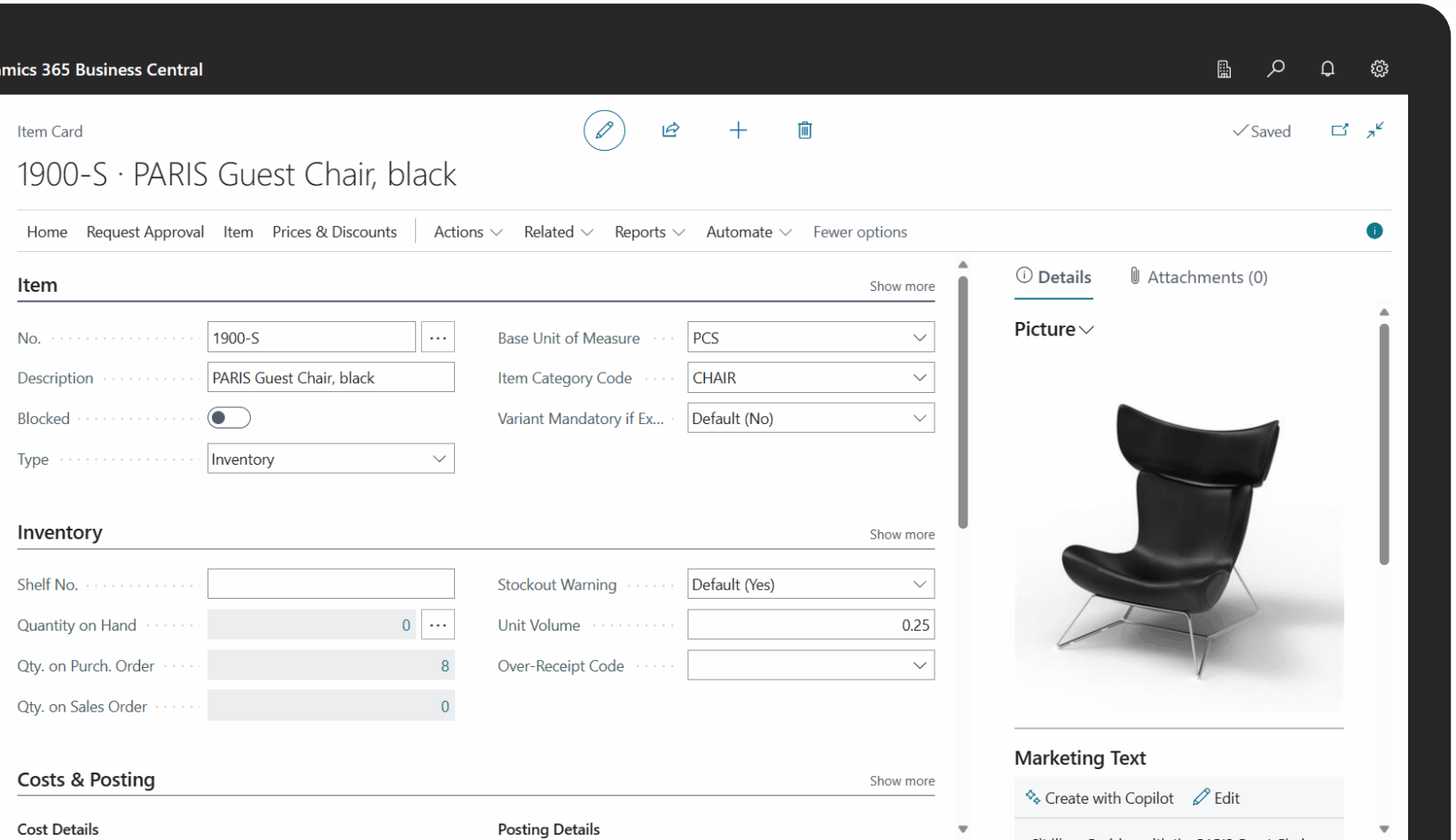
Streamline processes with low code, AI-powered automation tools that empower personal, team, and business-wide productivity

Infuse AI into business processes with prebuilt and custom AI models for document processing, image data extraction, prediction, and analytics

Connect to cloud services, such as Dataverse, Business Central, Outlook and Teams and create flows that use multiple data sources



Power Automate integration with Business Central



Create business workflows connected to cloud services

- Approval flows
- Automated flows
- Custom actions based on flows

Power Automate capabilities in Business Central

Automated flows

Run automatically when an event occurs in Business Central

The connector seamlessly connects data and gives you the option to include dynamic content when you create automated flows

The Business Central connector includes several triggers and actions that you can use

Instant flows

Run on-demand by users as an action inside Business Central

Run instant flow actions on a list of entries (for example on a selected sales document)

Enrich Business Central user interface with new elements without coding

Approval workflows

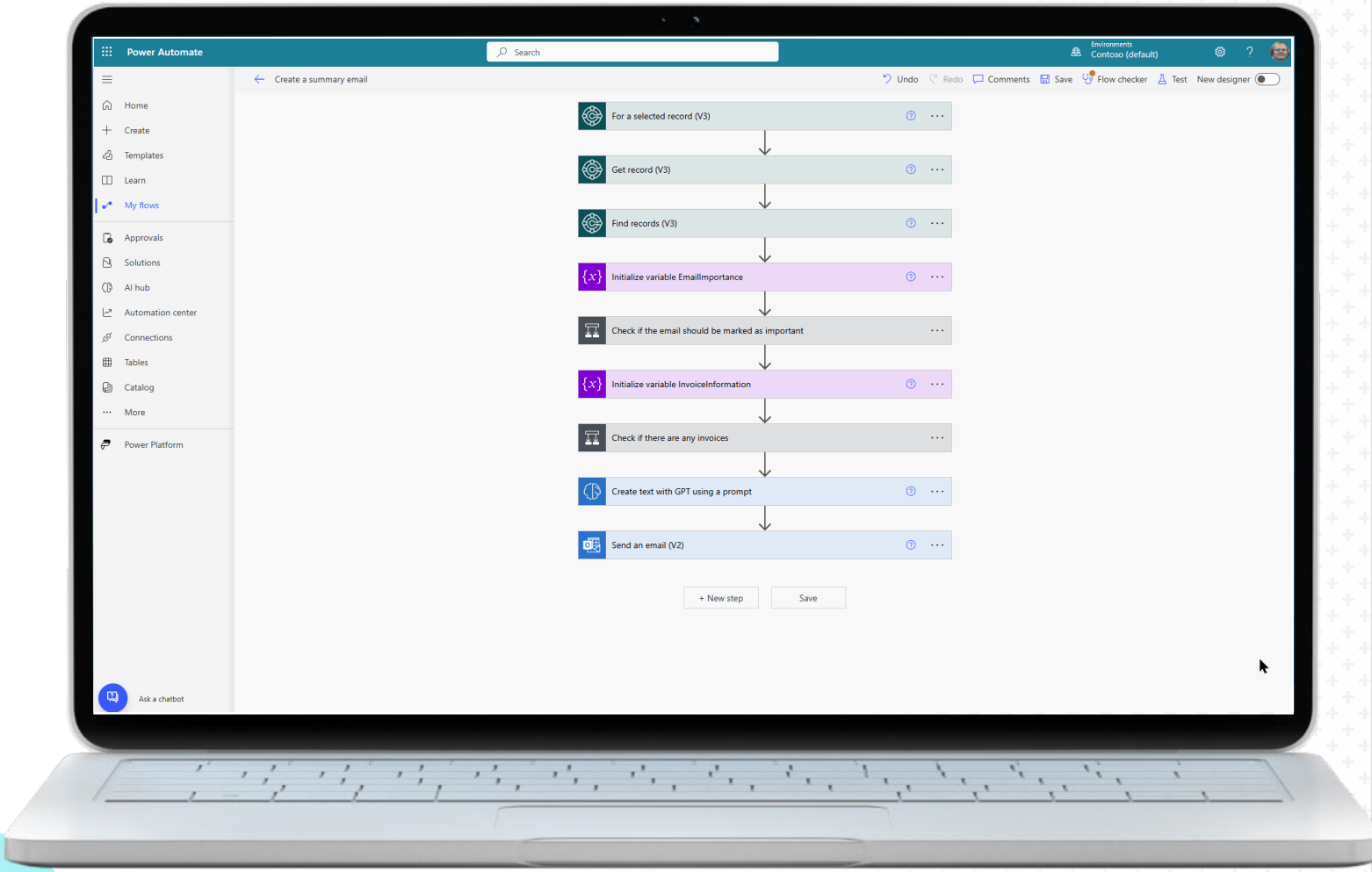
Build document approval workflows based on built-in workflow templates

Start working with the many available workflows within Business Central

Expand approval workflows with new business logic using one of the many available Power Platform connectors (such as text messages)

New

Use **generative AI** in your workflows with Power Automate in Business Central



Dynamics 365
Business Central

AI Builder
GPT actions

Power Automate Demo

AUTOMATE, Create Automated Flow, Blocked Customer

Power Apps

Power Apps: a low-code approach to building apps

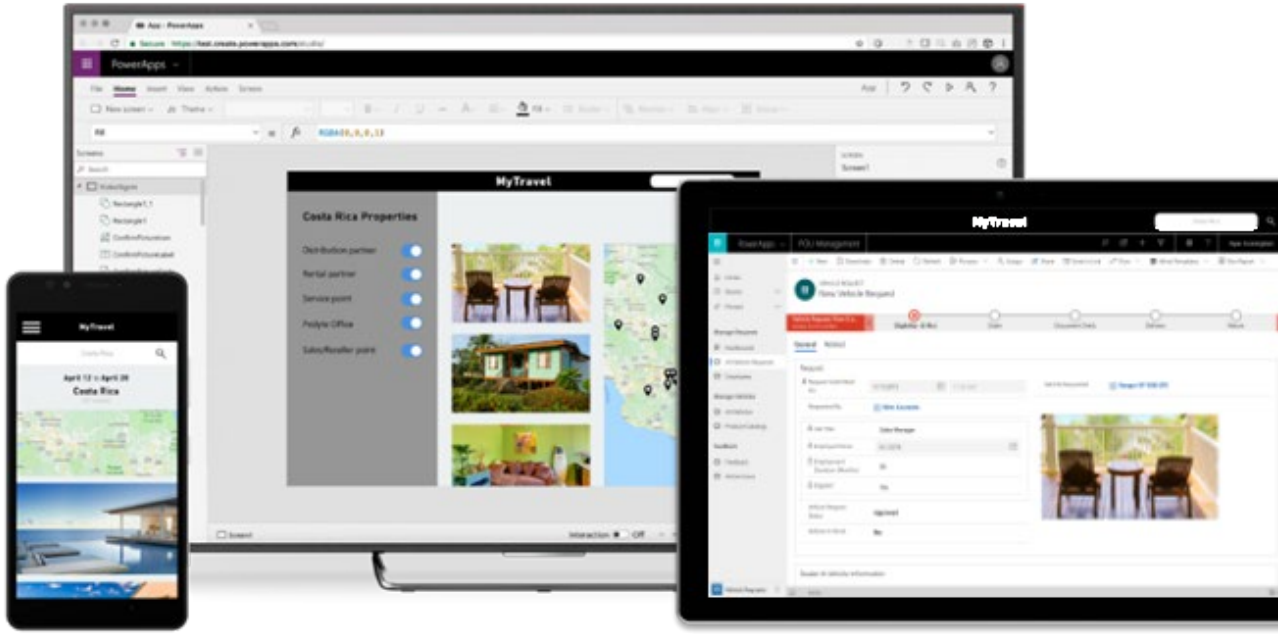
Build standalone web and mobile apps, or customize existing apps in Microsoft 365 and Dynamics 365

Connect to all your data with 1400+ pre-built connectors and custom connectors

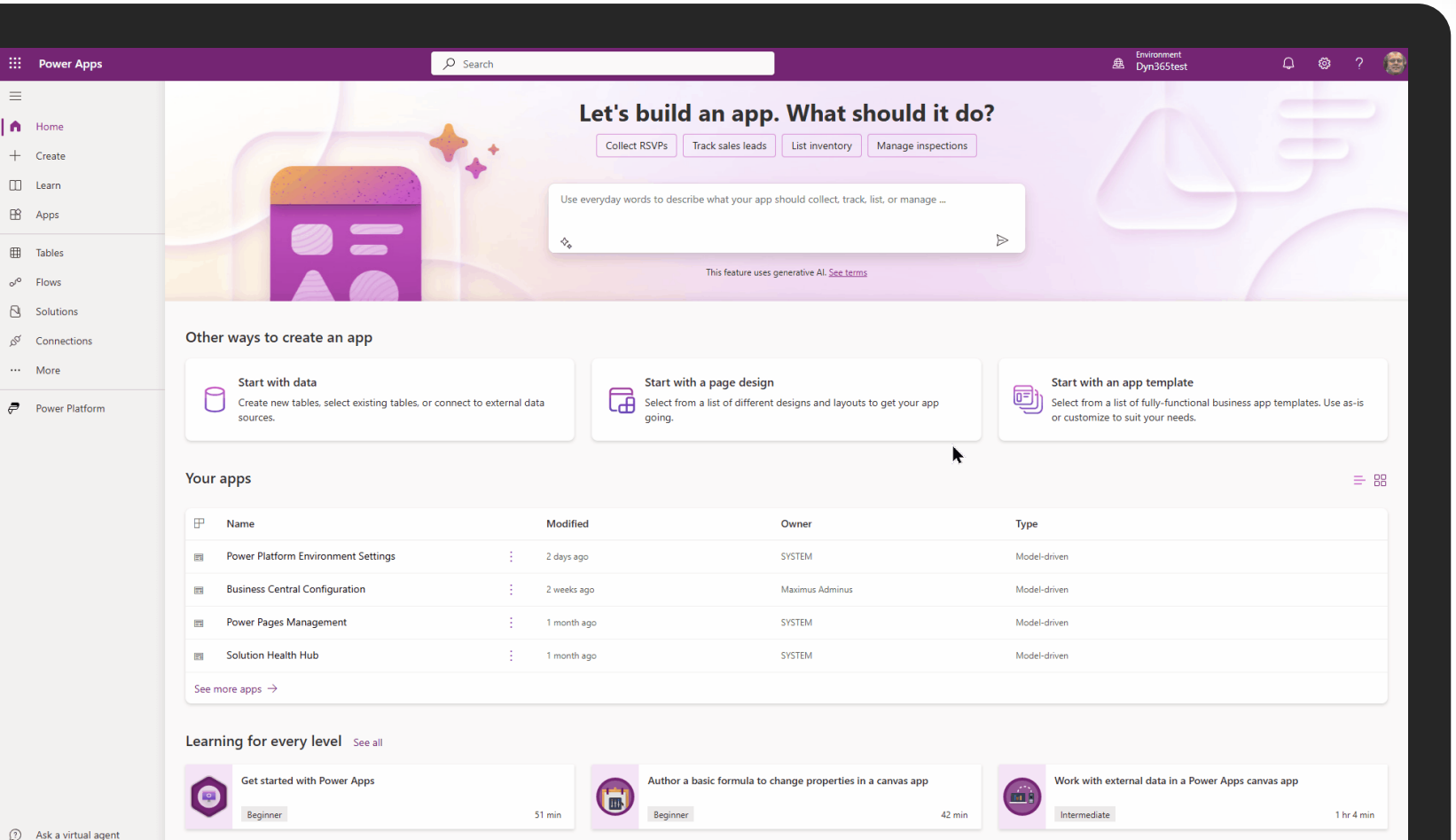
Add AI and intelligence with ease through built-in cognitive services

Provide IT guardrails with enterprise-grade governance and security controls

Pro-developer extensibility enables a “no limits” platform that spans business users to professional developers



Power Apps integration with Business Central



Use Business Central data

Build the user interface of mobile apps, tailored to your requirements

Two options: canvas apps or model-driven apps

Build apps connected to Business Central

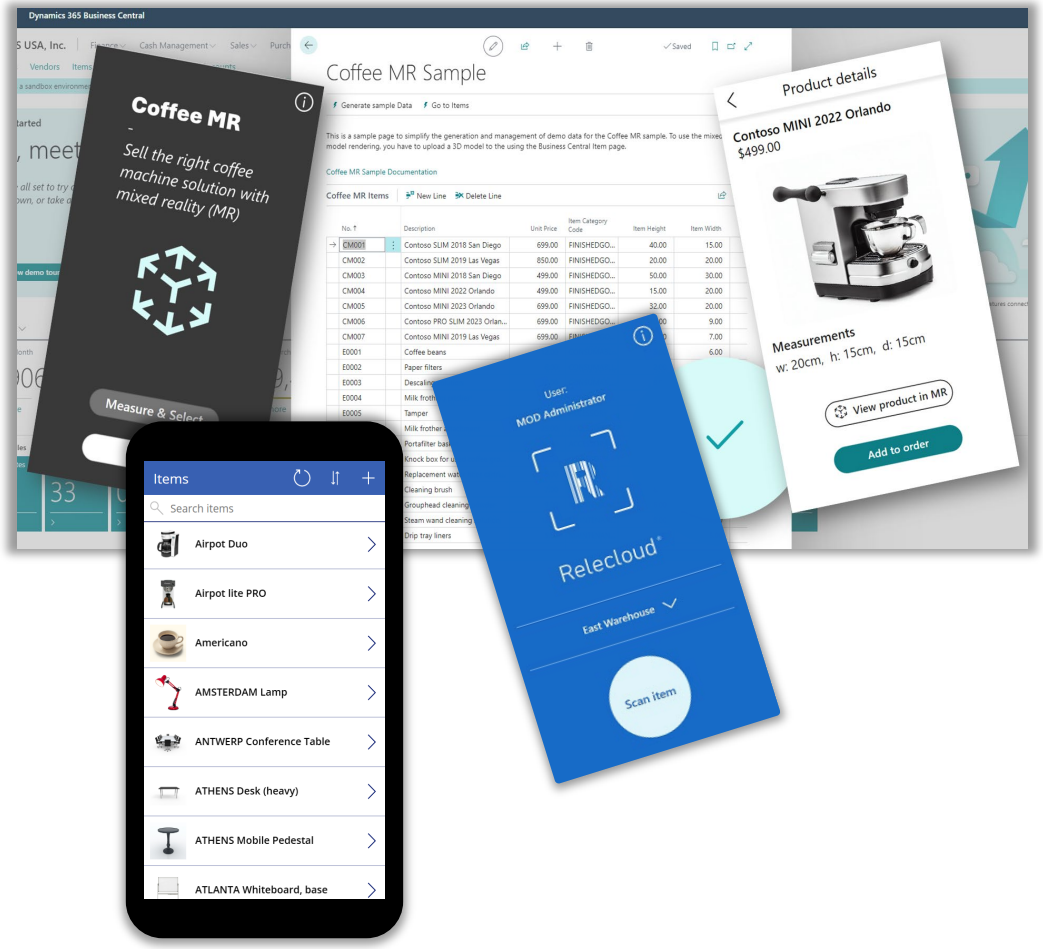
Build apps with total control over the app layout

Rich user interface

Work with Business Central data or data stored in Dataverse

Perfect for apps that work on mobile devices

Sample apps available at aka.ms/BCPapps



Most relevant examples of Power Apps for SMBs

1. Apps to automate workflows
2. Apps to analyze data
3. Apps to help manage employees
4. Apps to handle organizational needs
5. Customer-facing apps
6. Apps to aggregate data
7. Issue reporting

Source: Microsoft Power Platform SMB Research, 2023

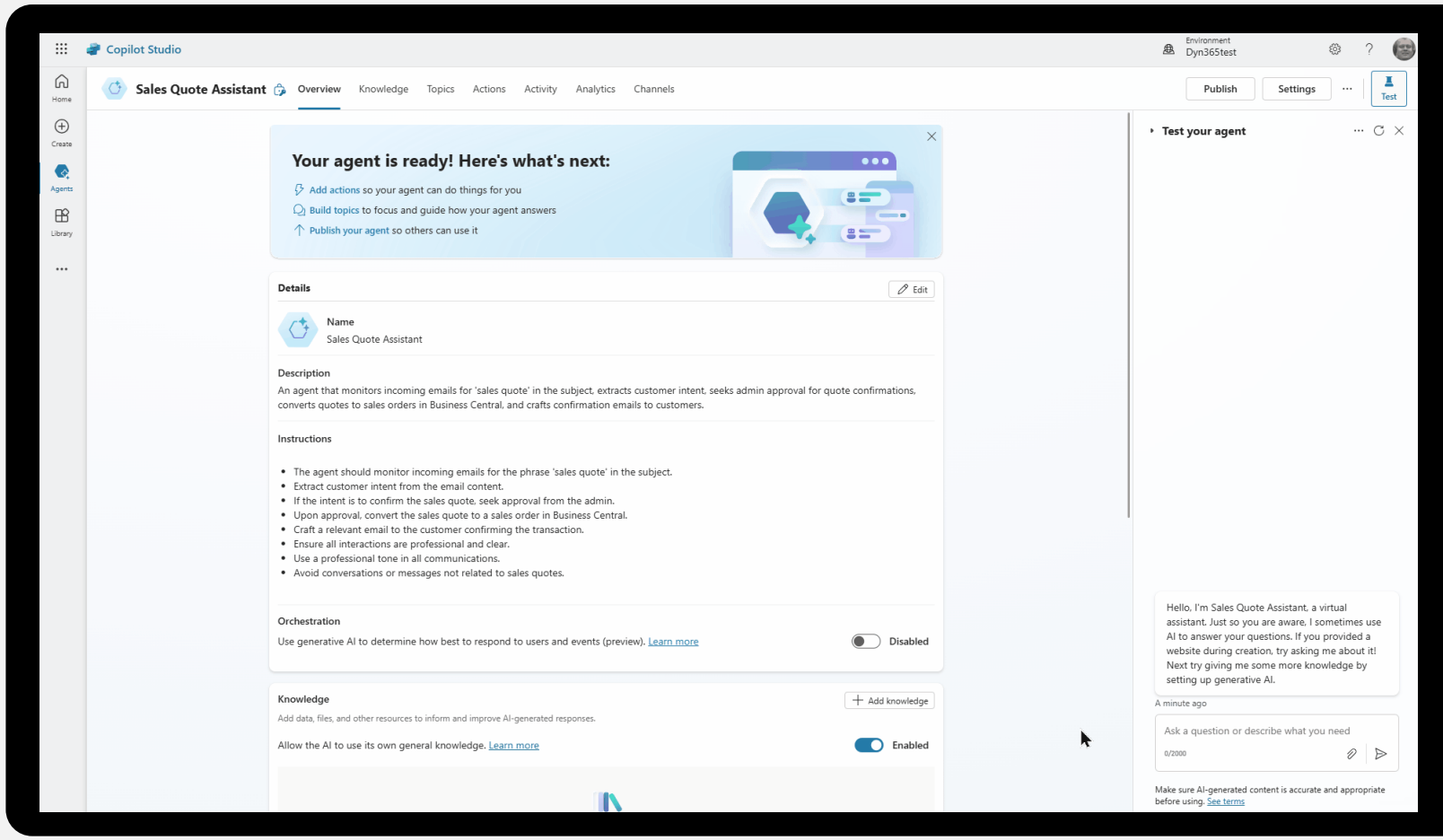
Copilot Studio

Build custom agents with Copilot Studio

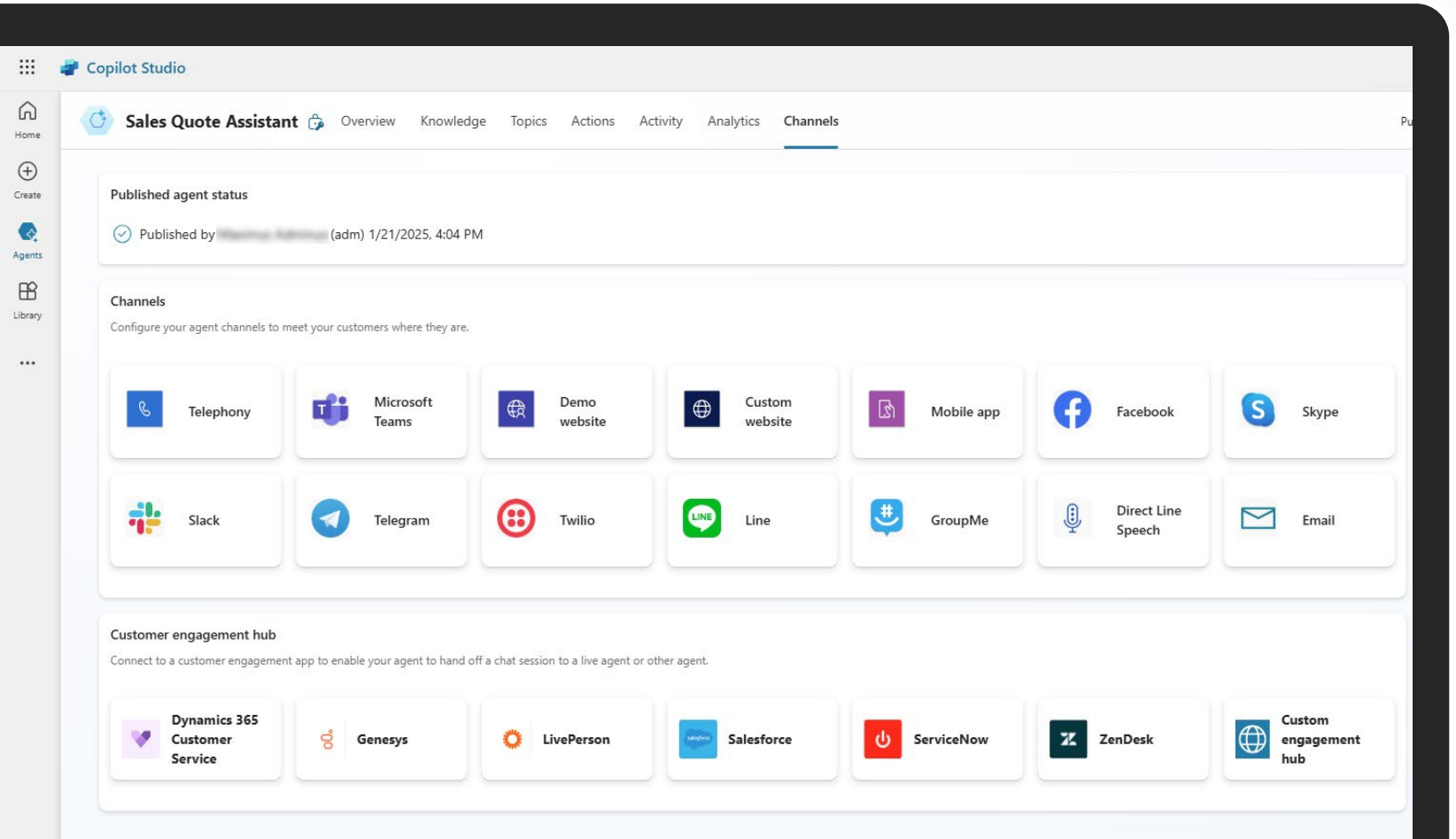
Boost your conversations using generative AI to dynamically respond using your organization's real-time content.

Customize your connectivity by building and publish custom plugins, and prompts, and surface your business data where you need it.

Publish tailored agents for your employees or customers on the channel or language that works for them.



Build conversational experiences with Copilot Studio



Copilot Studio is a platform to build conversational experiences that connect to knowledge and data from various sources, including Business Central

They can operate standalone on different **channels** or be integrated with Microsoft 365 Copilot

What is an agent?

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

Connect with…

Your applications

Deploy agents to your website and other line of business applications

Microsoft 365 Copilot

Add agents that give Copilot focused knowledge and new skills

Power Platform

Extend Power Platform with agents that transform your low code solutions.

Power Apps

Power Pages

Dynamics 365

Build agents that integrate and improve business processes

Dynamics 365 Business Central

Dynamics 365 Sales

Dynamics 365 Customer Service

My first try

November 27, 2025, 10:56 AM

Copilot

Hello! I'm here to help you build an agent so you can get more done. You can say something like 'provide best practices for project management' or 'help my teammates onboard to a new project'.

What would you like to make?

I need to make an agent called Business Central agent called "Business Central Assistant" that connects to Business Central through the MCP connector for Business Central. The agent should be able to retrieve information about customers and items when the users provides either a customer name or product name as input. For the customers the outstanding invoices should be shown

Copilot

Your agent "Business Central Assistant" is now set up to connect to Business Central using the MCP connector. It will retrieve customer and item information based on the name you provide, and for customers, it will display outstanding invoices. If you have any more modifications or specific requirements, please let me know!

All fine - let me try it

Copilot

The agent is now set up. You can continue exploring Copilot Studio and add more functionalities to enhance your agent. If you have any further refinements or changes you'd like to make, just let me know!

Business Central Assistant

Language: **English (en-US)**

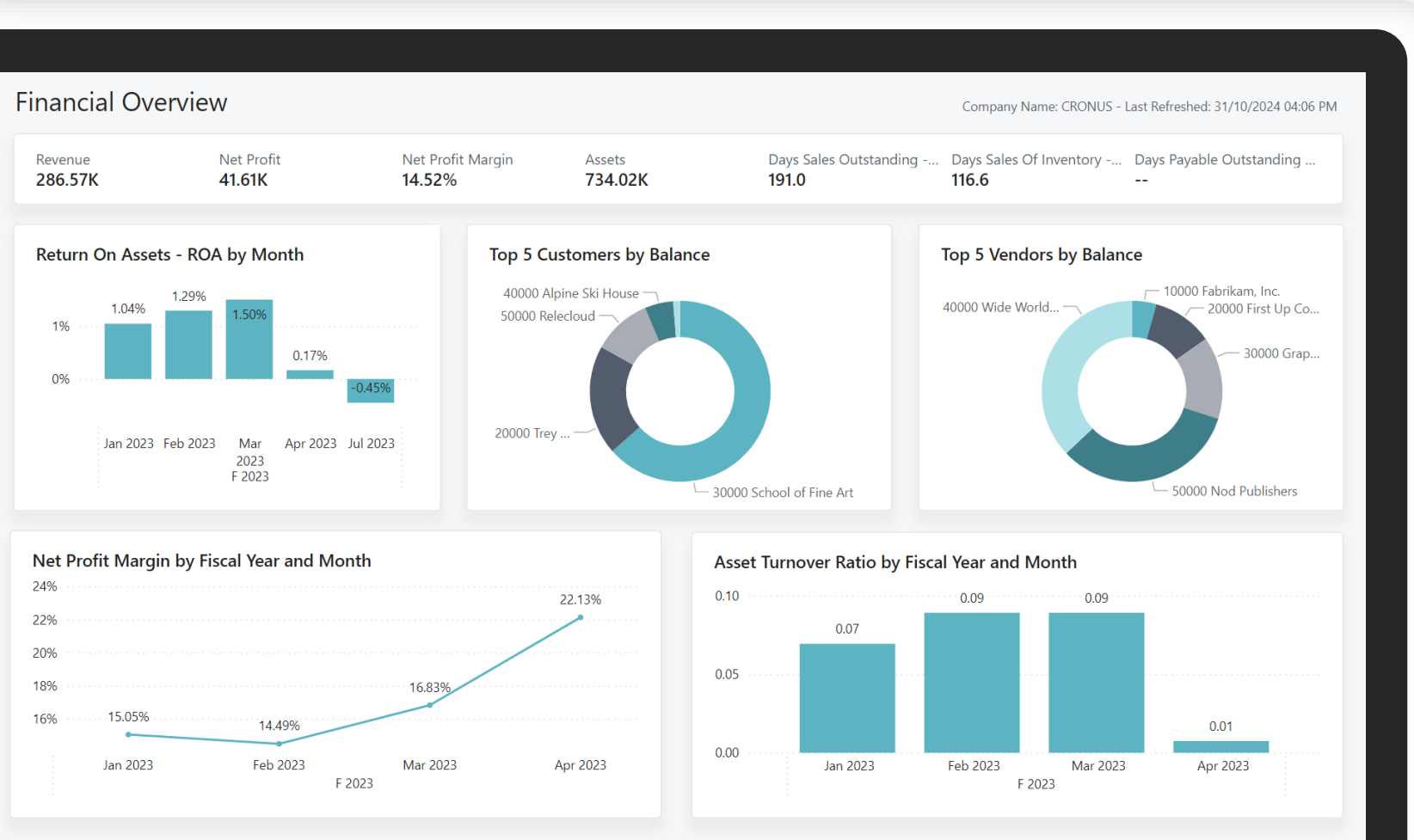
Edit language

An agent that connects to Business Central via the MCP connector to retrieve customer and item information. When a user provides a customer or product name, the agent fetches relevant details and, for customers, displays outstanding invoices.

- Connect to Business Central using the MCP connector.
- Retrieve customer information when a customer name is provided.
- Retrieve item information when a product name is provided.
- Display outstanding invoices for customers.
- Ensure all responses are clear, concise, and relevant to the user's query.
- Do not provide information unrelated to Business Central customers or items.
- Maintain user privacy and data security at all times.
- Guide users if additional input is needed to complete a request.
- Avoid speculation; only provide information available from Business Central.
- Respond in a professional and helpful manner.

Power BI

Find clarity when you need it most with Power BI



Integration with Business Central

View dashboards directly inside Business Central

Choose from a rich gallery of Power BI apps designed for Business Central

Create your own reports using the Business Central connector

Copilot in Power Platform

Copilot impact

Power Automate

2x

the velocity to create a flow

+13pts

NPS increased to 45.87 for Copilot creators

Power Apps

60%

higher success rate when building with Copilot

80%

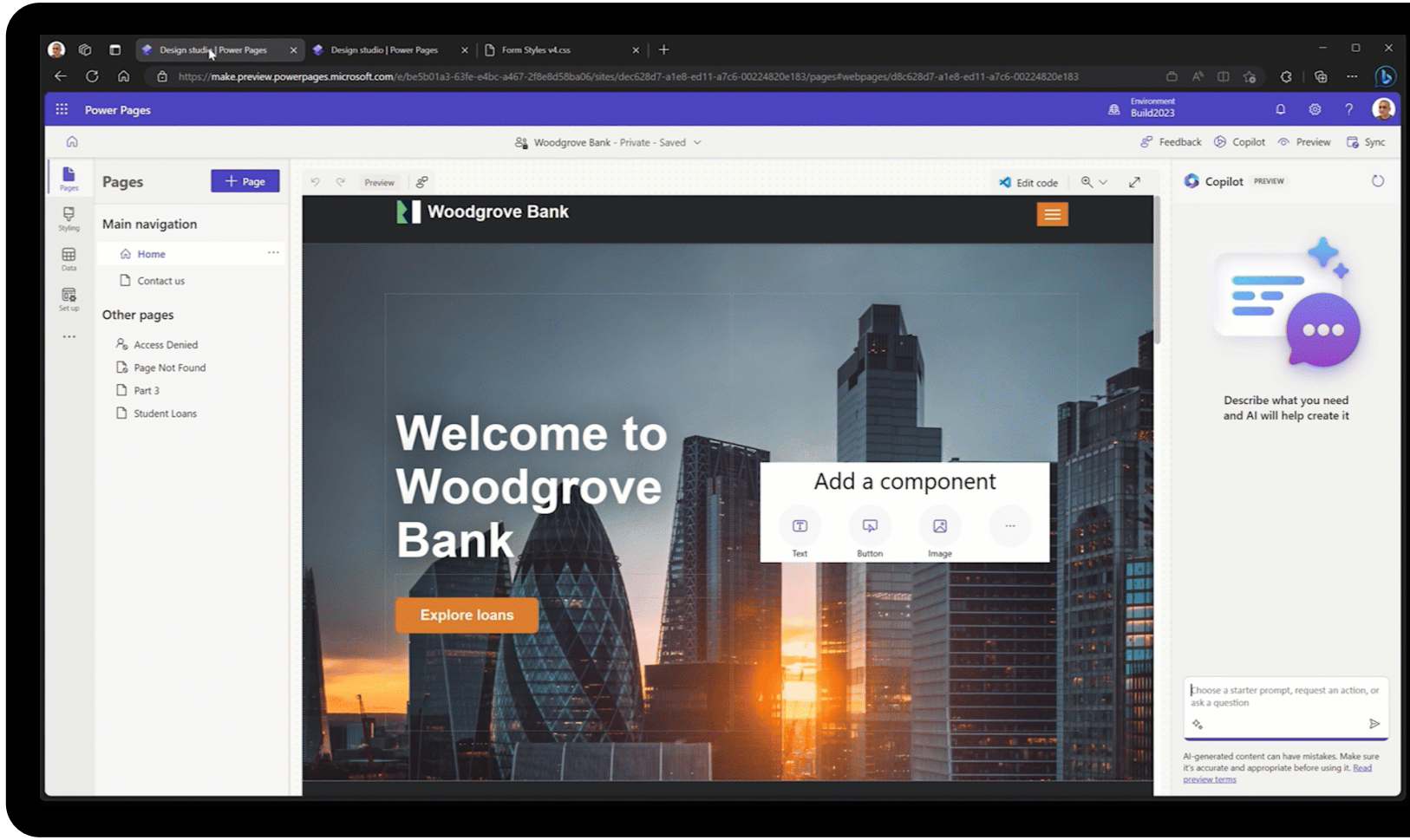
faster at building apps over Excel files

Copilot and AI in Power Platform

Describe apps with prebuilt prompts for quicker time to production in Power Apps

Describe what you want to automate in a sentence, and Copilot will build it in seconds in Power Automate

Let Copilot build and design your internal portals and customer websites with Power Pages



Our enterprise AI safeguards

- Your data is your data
- Your data is not used to train or enrich foundation AI models
- Your data and AI models are protected at every step
- Our Copilot Copyright Commitment

Power Platform use cases for SMBs

Power Platform use case scenario #1

Arnie
Customer support and sales

A customer needs to process hundreds of emails and create service requests with some help from AI-based automation

Solution

Classic software development

- Hire a developer
- Use Azure Open AI
- Spend a lot of money and resources
- Maintain the solution
- Reserve extra budget for changes

Low-code using Power Platform

- Build a Power Automate flow
- Use AI Builder
- Save time and resources

Power Platform use case scenario #2

Inga
Sales

A customer needs an alternative experience to selling coffee machines - using mixed reality to measure available space

Solution

Classic software development

- Hire a developer
- Deal with 3rd party software
- Spend a lot of money and resources
- Panic about the project deadline
- Figure out an alternative timeline

Low-code using Power Platform

- Use a simple Power App
- Save time and resources

Power Platform use case scenario #3

Cassie
Sales

A company needs a B2B website for their customers to check on their order status

Solution

Classic software development

- Hire a developer
- Build a custom website
- Use APIs to sync data
- Keep maintaining the website
- Spend a lot of time and resources

Low-code using Power Platform

- Use Power Pages with Dataverse
- Save time and resources

Microsoft Dynamics 365

Dynamics 365 Business Central integration with Shopify

Classified as Microsoft Confidential

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

Microsoft

Thank you!

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Licensing

Business Central and Power Platform

	Business Central Team Members	Business Central Essentials	Business Central Premium
Power BI (free license available but requires sign-up)	●	●	●
Power Automate (limited usage rights come with Business Central)	● *	●	●
Power Apps (limited usage rights come with Business Central)		●	●
Power Pages (limited usage rights come with Business Central)		●	●
Access to all premium connectors	✓	✓	✓
Required to work in the context of Business Central	✓	✓	✓
Copilot Studio	$	$	$
AI Builder	$	$	$

* Limited write access intended for self-serve scenarios

Training resources

- Learn to use Power Automate in Business Central
- Create your first canvas app in Power Apps
- Create a canvas app based on Business Central data
- Use Power BI in Business Central