

UD 25

# What's new in BC?

BC 26.0 - 2025 Wave 1 including 2024 Wave 2

# So what is new in BC?

- User Features
- Projects (aka Jobs)
- Multiple VAT no. for Customers
- Sustainability
- Reports
- Copilot
- Additional stuff we can't fit in

# User features

- **Drag and drop multiple files**
- **PDF Preview**
- **Check Doc. Total Amount**
- **Default Qty of 1 on document G/L Account lines**
- **Factbox and Column resize**
- **New faster Search**

# User features

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Customer Card



✓ Saved

60000 · Coffee 4 All

Home Request Approval New Document Prices & Discounts Customer Report More options

Contact Apply Template Merge With... Send Email

General

No.	60000	Responsibility Centre	
Name	Coffee 4 All	Service Zone Code	
IC Partner Code		Document Sending Profile	E-DOCUMENTS
Balance (LCY)	0.00	TOTAL Sales - Fiscal Year	0.00
Balance (LCY) As Vendor	0.00		0.00
Balance Due (LCY)	0.00		0.00
Credit Limit (LCY)	2,500.00		0.0
Blocked			
Privacy Blocked	<input type="checkbox"/>		
Salesperson Code	JO		

Select files

Drop files here or

+ Copy

Cancel

Address & Contact

Address		Mobile Phone No.	
Address 2		Email	
Country/Region Code	GB	Fax No.	
City		Home Page	
County		Language Code	
Postcode	WC2E 7HQ	Format Region	
		<b>Contact</b>	
		Contact Code	
		Contact Name	

Summary Preview

Summarisation was stopped.

Details Attachments (0)

Documents (0)

Name	File
(There is nothing to show in this view)	

Links +

(There is nothing to show in this view)

Notes +

(There is nothing to show in this view)

### Attached Documents



- Search
- + New
- Edit List
- Delete
- View
- Download
- Open in OneDrive
- Attach files



View the file. You will be able to download the file from the viewer control. Works only on limited number of file types.

Attachment	File Extension	File Type	User	Attached Date	Flow to Sales Trx	Flow to Service Trx
→ <a href="#">Credit report</a>	pdf	PDF	ALEXW	24/04/2025 16:18	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Customer Agreement</a>	pdf	PDF	ALEXW	24/04/2025 16:18	<input type="checkbox"/>	<input type="checkbox"/>
<a href="#">Customer Data Confidentiality Agrrement</a>	pdf	PDF	ALEXW	24/04/2025 16:18	<input type="checkbox"/>	<input type="checkbox"/>

Close

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# Projects (aka Jobs)

- **Multiple Bill-to Customers**
- **Creating warehouse pick**
- **Location Code on Project Planning Lines**
- **Sales Invoices – Get Planning Lines**
- **Integrates with Field Service**

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# Multiple VAT no.'s for customers

- **Alternative VAT Reg. No. per ship to country**
- **Customer**
- **Documents**
- **Updates to VAT Entries**
- **VAT Returns can be filtered by country**

# Sustainability

- **Default Sustainability Account**
- **Sustainability within General Journals**
- **Scope 3 Value Chain tracking**

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# Reporting

- **Word enhancements**
- **New Excel Reports**
- **Ad-hoc Analysis**

# Reporting

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- New Excel Reports
- Ad-hoc Analysis

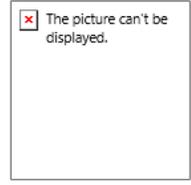
Insert Layout Comment  
 Hide If Empty  
 Tutorials Help About

- Hide Empty Table
- Hide Empty Table Row
- Hide Empty Table Column
- Hide Field If Zero

# Document Title Lbl

Document No

- CustomerAddress1
- CustomerAddress2
- CustomerAddress3
- CustomerAddress4
- CustomerAddress5
- CustomerAddress6
- CustomerAddress7
- CustomerAddress8



## CompanyAddress1

- CompanyAddress2
- CompanyAddress3
- CompanyAddress4
- CompanyAddress5
- CompanyAddress6
- CompanyHomePage
- CompanyEMail
- CompanyPhoneNo

DocumentDate\_Lbl

DueDate\_Lbl

PaymentTermsDescription\_Lbl

DocumentDate

DueDate

PaymentTermsDescription

ItemNo_Lin e_Lbl	Description_Line_Lbl	Quantity_L ine_Lbl	Unit_L bl	UnitPrice_ Lbl	VATPct_L ine_Lbl	LineAmount_Li ne_Lbl
ItemNo_Lin e	Description_Line	Quantity_L ine	UnitOf Measu re	UnitPrice	LineDi scount Percent Text _Line	VATPct_ Line Amount_Li ne
						AmountForma
						Description_ReportTotalsLine tted_ReportTo talsLine
						<b>TotalText</b>
						<b>TotalAmountInclud ingVAT</b>

### XML Mapping

Custom XML Part:  
 urn:microsoft-dynamics-nav/reports/Standard\_Sales\_Invoice/1306/

- NavWordReportXmlPart
  - BCReportInformation
    - ReportMetadata
      - ExtensionId
      - ExtensionName
      - ExtensionPublisher
      - ExtensionVersion
      - ReportId
      - ReportName
      - AboutThisReportTitle
      - AboutThisReportText
      - ReportHelpLink
    - ReportRequest
      - TenantEntrald
      - EnvironmentName
      - EnvironmentType
      - CompanyName
      - CompanyDisplayName
      - CompanyId
      - UserName
      - DateAndTime
      - Language
      - FormatRegion
      - > DateTimeValues
    - > Header

# Reporting

- Word enhancements
- **New Excel Reports**
- Ad-hoc Analysis

# New Excel Reports

## Finance

- Trial Balance
- Trial Balance by period
- Trial Balance/budget
- Trial Balance/previous year
- Consolidated Trial Balance
- Aged Accounts Receivable
- Aged Accounts Payable

# New Excel Reports

## Sales and Purchasing

- Customer – Top 10 list
- Aged Accounts Receivable
  
- Vendor – Top 10 list
- Aged Accounts Payable

# New Excel Reports

## Fixed Assets

- Fixed Asset Detail
- Fixed Asset Analysis
- Fixed Asset Projected Value

# New Excel Reports Sustainability

- Total Emissions
- Emissions by Category
- Emissions per Facility

# Excel Reports now Obsolete

- Balance Sheet
- Income Statement
- Statement of Cash Flow
- Statement of Retained Earnings
- Customer Statements
- Aged Accounts Receivable
- Aged Accounts Payable

# Reporting

- Word enhancements
- New Excel Reports
- **Ad-hoc Analysis**

# Ad hoc Analysis

- Service Ad Hoc Analysis
- Project Ad Hoc Analysis
- Fixed Ad Hoc Analysis
  
- 26.1 Sales Order Performance
- 26.1 Purchase Order Performance

# Connect to banks bank feeds.

Get started: Here are a few things you can t

### Activities

Sales This Month <b>£4,723</b> <a href="#">See more</a>	Overdue Sales Invoice Amount <b>£44,005</b> <a href="#">See more</a>	Overdue Purch. Invoice Amount <b>£341,196</b> <a href="#">See more</a>	Sales Invoices Predicted Overdue <b>0</b> <a href="#">See more</a>
---	--	--	--

### Ongoing Sales

Sales Quotes <b>2</b> <a href="#">See more</a>	Sales Orders <b>11</b> <a href="#">See more</a>	Completely Re... from Stock <b>0</b> <a href="#">See more</a>	Sales Invoices <b>7</b> <a href="#">See more</a>
--	---	---	--

### Ongoing Purchases

Purchase Orders <b>15</b> <a href="#">See more</a>	Ongoing Purch... Invoices <b>4</b> <a href="#">See more</a>	Purch. Invoices... Next Week <b>0</b> <a href="#">See more</a>
--	---	--

### Payments

Unprocessed Payments <b>1</b> <a href="#">See more</a>	Average Collec... Days <b>0.0</b>	Outstanding V... Invoices <b>18</b> <a href="#">See more</a>
--	--------------------------------------	--

### Scan documents



### Incoming Documents

My Incoming Documents  
**1**

Tell me what you want to do

**Go to Reports and Analysis**

- Service Ad-hoc Analysis Reports and Analysis
- Project Ad-hoc Analysis Reports and Analysis
- Fixed Assets Ad-hoc Analysis Reports and Analysis

---

Search for 'ad-hoc'

- Search company data
- Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

- Find entries... > Reports
- New > Excel Reports
- Payments > Power BI Reports

Show demo tours

# Reporting

- Word enhancements
- New Excel Reports
- Ad-hoc Analysis

# Standard Power BI

- Finance
- Sales
- Purchasing
- Inventory
- Projects
- Manufacturing

# Opportunity Overview

Company Name: YELLOWSTONE - Last Refreshed: 14/03/2025 02:03 PM

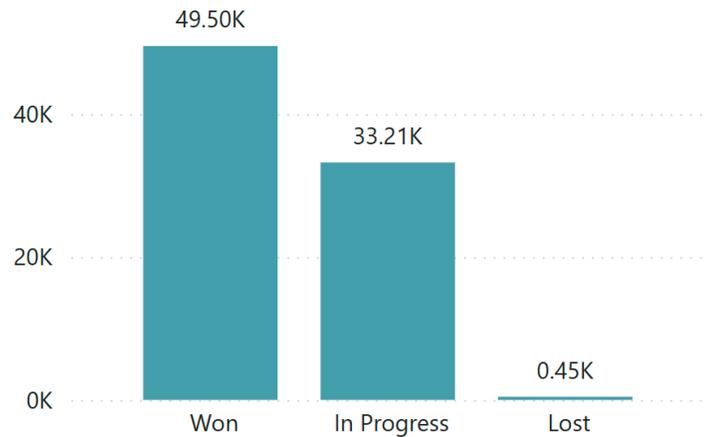
No. of Opportunities  
**15**

Estimated Value  
**83.16K**

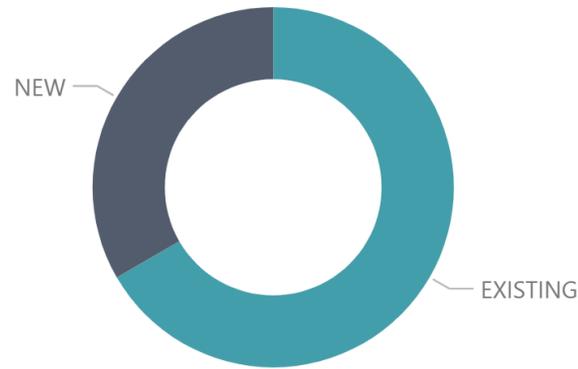
Calculated Current Value  
**52.45K**

Opportunity Sales Quote Amount  
**12.71K**

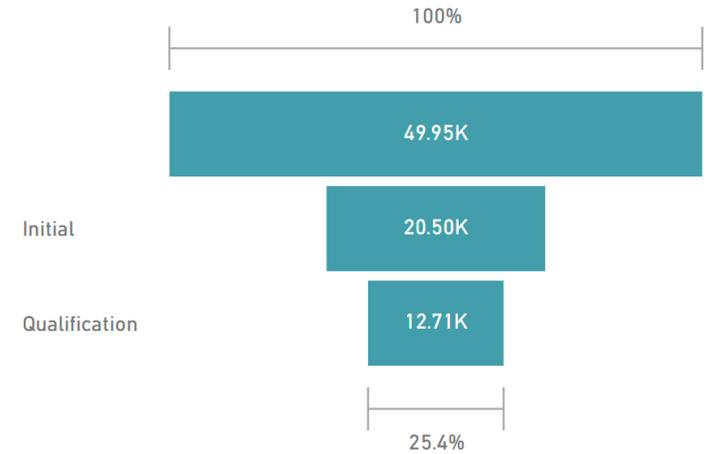
## Estimated Value by Opportunity Status



## Opportunities by Sales Cycle



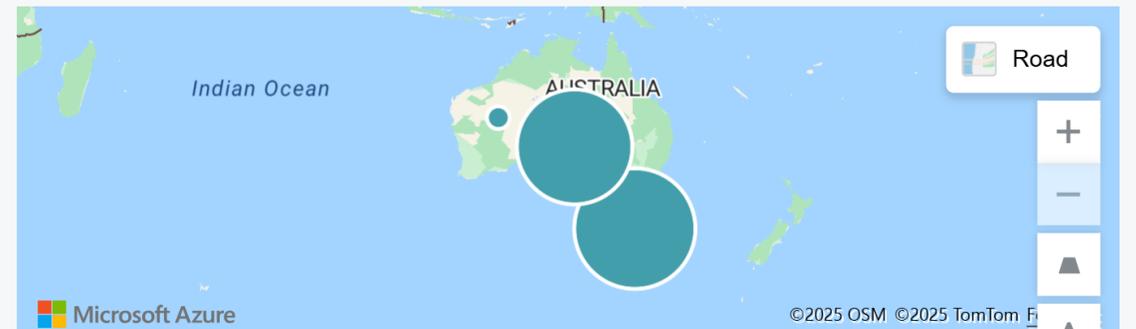
## Estimated Value by Sales Cycle Stage



## Opportunities by Salesperson

Salesperson Name	No. of Opportunities	Estimated Value	Calculated Current Value	Average Char
<b>Benjamin Chiu</b>	<b>4</b>	<b>18,212.00</b>	<b>2,652.40</b>	
OP000001	1	12,712.00	2,542.40	
OP100022	1	5,000.00	100.00	
<b>Total</b>	<b>15</b>	<b>83,162.00</b>	<b>52,452.40</b>	

## Estimated Value by Contact Location



# Sales Quote Overview

Company Name: YELLOWSTONE - Last Refreshed: 14/03/2025 02:03 PM

No. of Sales Quotes  
**41**

Sales Amount  
**652.74K**

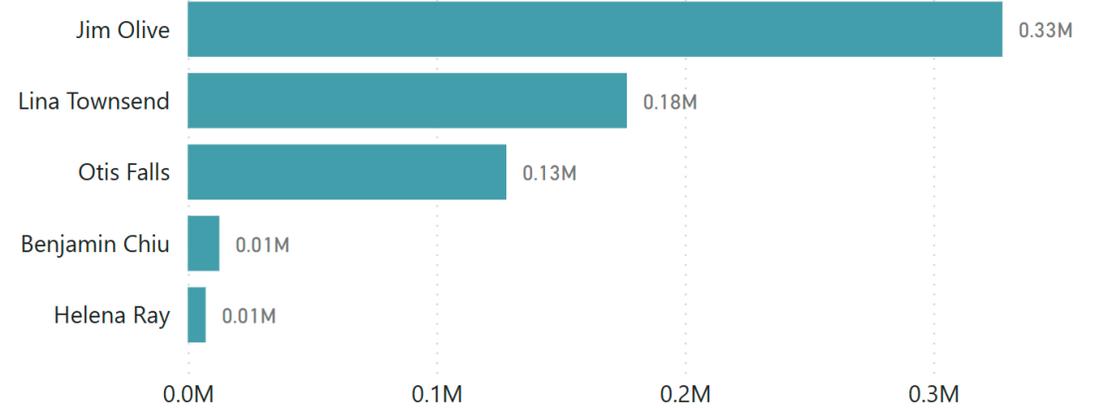
Gross Profit  
**167.88K**

Gross Profit Margin  
**25.72%**

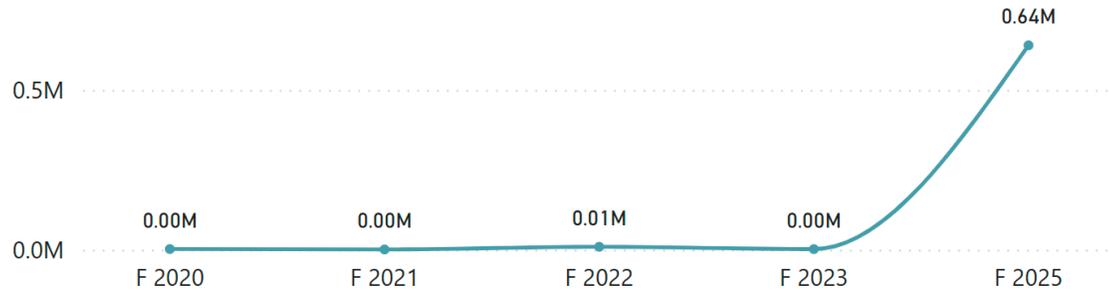
## Sales Quotes by Customer

Customer Name	Sales Amount	Sales Quantity	Gross Profit	Gross Profit Margin
⊕ Adatum Corporation	<u>326,056.00</u>	231.00	71,701.00	21.99%
⊕ Alpine Ski House	<u>68,162.00</u>	142.00	27,214.00	39.93%
⊕ Relecloud	<u>74,576.00</u>	159.00	18,160.00	24.35%
⊕ School of Fine Art	<u>70,845.00</u>	101.00	25,901.00	36.56%
⊕ Trey Research	<u>113,105.00</u>	157.00	24,899.00	22.01%
<b>Total</b>	<b><u>652,744.00</u></b>	<b>790.00</b>	<b>167,875.00</b>	<b>25.72%</b>

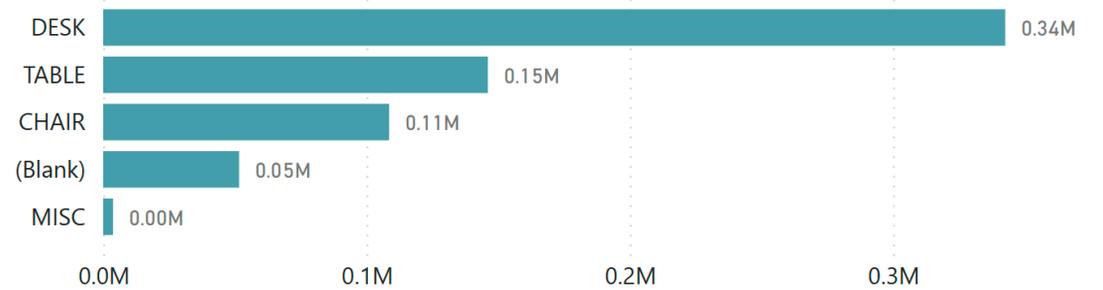
## Sales Quote Amount by Salesperson



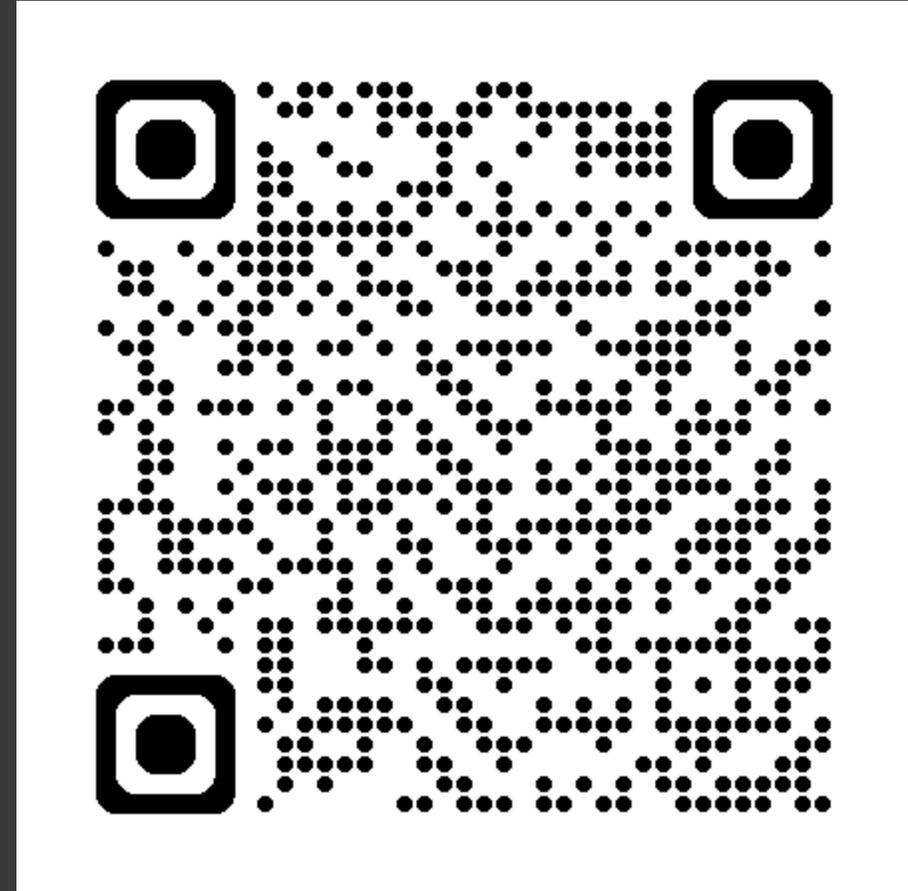
## Sales Quote Amount Over Time



## Sales Quote Amount by Item Category Code



All you need  
to know  
about BC  
reporting



[aka.ms/bcreporting](https://aka.ms/bcreporting)

# Copilot

- Sales Order Agent
- Payables Agent
- Autofill
- Summarise
- Chat with Copilot

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# Payables Agent



# Payables Agent

- Public preview later this year
- Processes invoice in E-Documents
- Supports PDF Invoices
- Intelligent accounting according to history, policy & other predictors
- Configurable 'human-in-the-loop'
- More improvements to come...

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Customer Card



✓ Saved



# C00020 · ABC Company

Home

Request Approval

New Document

Prices & Discounts

Customer

Report

More options



Contact



Apply Template



Merge With...



Send Email



## Address

Address .....

Address 2 .....

Country/Region Code ..



City .....

County .....

Postcode .....

[Show on Map](#)

Phone No. ....

Mobile Phone No. ....

Email .....

Home Page .....

## Contact

Contact Name .....





Customer Card



Keep all (8)



# C00020 · ABC Company

Home

Request Approval

New Document

Prices & Discounts

Customer

Report

More options



Copilot suggestion Preview

**Frequent choice:** This is the most frequently used value for this type of field in your company.

AI-generated content may be incorrect



Keep

Change



Add

Add

Add

Country/Region Code



GB

City



Cambridge

Post Code



CB1 2FB

Show on Map

Phone No.

Mobile Phone No.

Email

Home Page

Contact

Contact Name

Invoicing

3 suggestions

AI-generated content may be incorrect



Show more

VAT Registration No.

Posting Details

Customer Card

C00020 · ABC Company

Home Request Approval New Document Prices & Discounts Customer

Contact Apply Template Merge With... Send Email

City Cambridge

Post Code CB1 2FB

Show on Map

Invoicing 3 suggestions AI-generated content may be incorrect

VAT Registration No.

EORI Number

Use GLN in Electronic D...

Copy Sell-to Addr. to Q... Company

Posting Det...

Gen. Bus. Posting Group

Customer Posting Group DOMESTIC

Prices and Discounts

Customer Price Group

Keep all (8)

- Blocked: Ship
  - Payment Terms Code: 1M(8D)
  - Gen. Bus. Posting Group: D...
  - Customer Posting Group: D...
  - Customer Disc. Group: RETAIL
  - Country/Region Code: GB
  - City: Cambridge
  - Post Code: CB1 2FB
- AI-generated content may be incorrect
- Keep selected Discard all

# Copilot

- Sales Order Agent
- Payables Agent
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# Copilot

- Sales Order Agent
- Payables Agent
- Autofill
- Summarise
- Chat with Copilot

# 101011 · Relecloud

Home Prepare Print/Send Request Approval Order More options

Post... Release Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

## General Show more

Customer Name	Relecloud	Order Date	04/06/2025
Contact	Jesse Homer	Due Date	18/06/2025
Document Date	04/06/2025	Requested Delivery D...	
Posting Date	04/06/2025	External Document No.	
VAT Date	04/06/2025	Status	Open

## Lines Show Lines with Issues

New Line Delete Line Select items...

Type	No.	Description	Location Code	Quantity	VAT Bus. Posting Group
→ Item	1900-S	PARIS Guest Chair, black		4	EXPORT

Subtotal Excl. VAT (G...	500.40	Total Excl. VAT (GBP)	500.40
Inv. Discount Amount...	0.00	Total VAT (GBP)	0.00
Invoice Discount %	0	Total Incl. VAT (GBP)	500.40

## Summary Preview 1 minute ago

- The balance on the customer's account totals **6,491.88 LCY**, with overdue amounts also at **6,491.88 LCY**, indicating outstanding payments.
- Outstanding invoices amount to **5,470.68 LCY**, alongside sales for this order of **500.40 LCY**, reflecting revenue generation.
- The adjusted profit for this order is **110.40 LCY**, with an original profit percentage of **22.1%**, indicating profitability.

Show more

## Details Attachments (0)

### Document Check



Refresh

Issues  
No issues found.

## Copilot Preview

Please answer...  
You can use the prompt guide for suggestions by selecting this button

Terms of use | Learn more

### Summarise Sales Order 101011 · Relecloud

- Here's the summary:
- The outstanding balance on this account is **6,491.88 LCY**, with overdue amounts totaling **6,491.88 LCY**.
  - There are **5,470.68 LCY** in outstanding invoices that require attention to ensure cash flow stability.
  - Sales generated from this order amount to **500.40 LCY**, with an adjusted profit of **110.40 LCY** indicating profitability.
  - The original profit percentage for this order is **22.1%**, reflecting a healthy profit margin.
  - Currently, this customer has **2 ongoing sales orders** and **43 posted sales invoices**, demonstrating active engagement.
  - There are **43 posted sales shipments** for this customer, while **0 ongoing sales quotes** suggest a gap in potential sales opportunities.

AI-generated content may be incorrect

View prompts

Ask a question

# Copilot

- Gemma's Excel and Copilot Trick!

# Other Stuff

- Manufacturing
- Field service integration with Service Management
- Subscription Billing
- Cost Adjustments error improvements
- Performance Profiler
- Concurrent posting to ledger entries
- And loads more...

# Thank You.

Please reach out if you have any questions

Gemma Mooney - [g.mooney@node4.co.uk](mailto:g.mooney@node4.co.uk)

Andre Verster - [a.verster@node4.co.uk](mailto:a.verster@node4.co.uk)

# Please rate all sessions

let us know how we did

