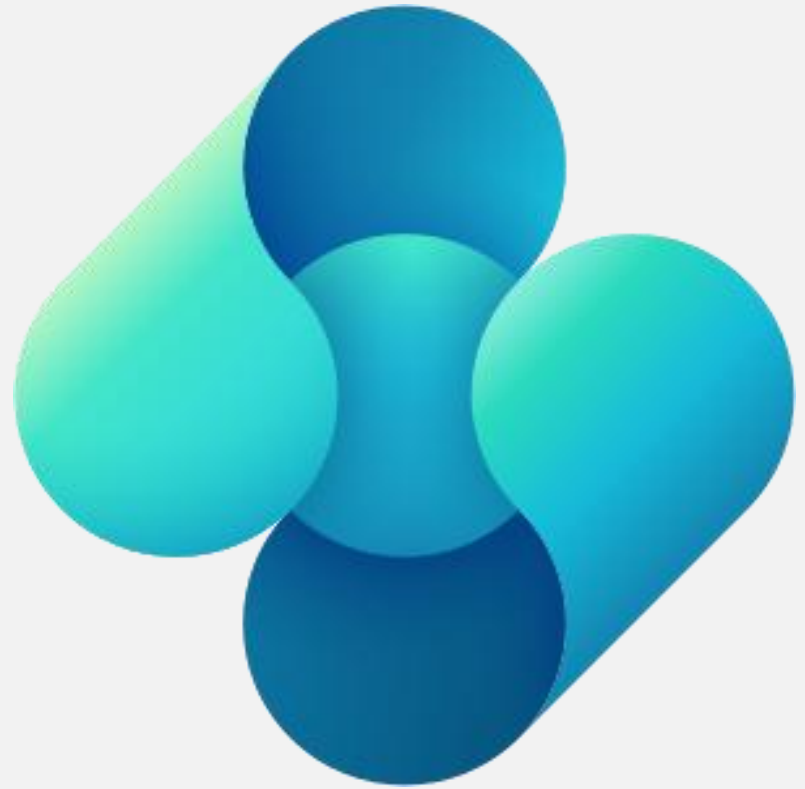


Copilot in BC *Today*

Adam Rickard

Head of AI Business
Applications Pre-Sales





Where does Copilot live in BC?



Discrete Functions

Standard functionality made better with AI across BC

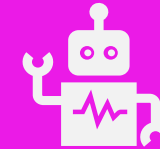
In the product for years, most customers haven't noticed it



In-built Assistant

A BC specific Copilot chat

Ask questions in plain language, navigate and interrogate your BC data by talking



Agents

Autonomous members of the team

Monitors a process, makes a judgment, takes action - without you initiating each step

Discrete Functionality

The (brief) history

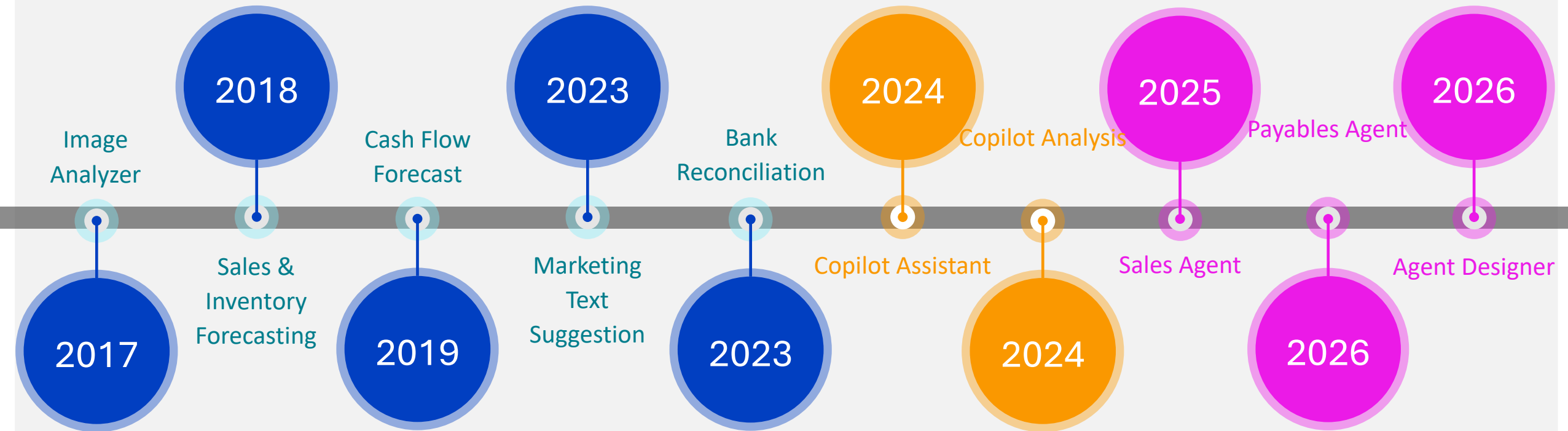


Image Analysis

The original AI in BC

The screenshot shows the Dynamics 365 Business Central interface for an Item Card. The item is '1908-S · LONDON Swivel Chair, blue'. The interface includes sections for Item details, Inventory, and Costs & Posting. A right-hand pane shows 'Summary' and 'Details' tabs, with a 'Picture' section containing a 3D wireframe cube icon. Below the picture is a 'Marketing Text' section with an 'Edit' button and a 'Draft with Copilot' button. The generated marketing text reads: 'Take elegance for a spin with the LONDON Swivel Chair – where style and comfort swirl together in a sea of blue!'.

Item	
No.	1908-S
Version Code	
Item Status Code	
Hide In Lookup	<input type="checkbox"/>
Description	LONDON Swivel Chair, blue
Blocked	<input type="checkbox"/>
Type	Inventory
Base Unit of Measure	PCS
Item Category Code	FURNITURE
Variant Mandatory if E...	Default (Yes)
Status	
Show on Portal	<input type="checkbox"/>

Inventory	
Shelf No.	
Inventory	310
Qty. on Sales Order	977
Qty. on Purch. Order	745
Qty. on Prod. Order	0
Stockout Warning	Default (Yes)
Unit Volume	0.25
Over-Receipt Code	

Costs & Posting	

Provide the file and AI analyses images to enriches data automatically

- Works on Items to update attributes, and description
- Also works on Contacts to suggest age and gender (That may or may not be a good idea...)

Image Analysis

The original AI in BC

Item Card
1908-S · LONDON Swivel Chair, blue

Environment: Production

Item Details:

No.	1908-S	Type	Inventory
Version Code		Base Unit of Measure	PCS
Item Status Code		Item Category Code	FURNITURE
Hide In Lookup	<input type="checkbox"/>	Variant Mandatory if E...	Default (Yes)
Description	LONDON Swivel Chair, blue	Status	
Blocked	<input type="checkbox"/>	Show on Portal	<input type="checkbox"/>

Inventory:

Shelf No.		Qty. on Sales Order	977
Inventory	310	Stockout Warning	Default (Yes)
Qty. on Purch. Order	745	Unit Volume	0.25
Qty. on Prod. Order	0	Over-Receipt Code	

Marketing Text:

Take elegance for a spin with the LONDON Swivel Chair – where style and comfort swirl together in a sea of blue!

Provide the file and AI analyses images to enrich data automatically

- Works on Items to update attributes, and description
- Also works on Contacts to suggest age and gender (That may or may not be a good idea...)

Image Analysis

The original AI in BC

The screenshot shows the Dynamics 365 Business Central interface for an Item Card. The item is '1908-S · LONDON Swivel Chair, blue'. A dialog box titled 'Select a picture to upload' is overlaid on the screen, containing a dashed box for file placement and the text 'Drop a file here to upload, or click here to browse'. The background shows various fields for item details, inventory, and marketing text.

Item Card: 1908-S · LONDON Swivel Chair, blue

Item Details:

- No.: 1908-S
- Version Code: [Empty]
- Item Status Code: [Empty]
- Hide In Lookup: [Off]
- Description: LONDON Swivel Chair, blue
- Blocked: [Off]

Inventory:

Shelf No.	[Empty]	Qty. on Sales Order	977
Inventory	310	Stockout Warning	Default (Yes)
Qty. on Purch. Order	745	Unit Volume	0.25
Qty. on Prod. Order	0	Over-Receipt Code	[Empty]

Marketing Text:

Take elegance for a spin with the LONDON Swivel Chair – where style and comfort swirl together in a sea of blue!

Provide the file and AI analyses images to enriches data automatically

- **Works on Items to update attributes, and description**
- **Also works on Contacts to suggest age and gender**
(That may or may not be a good idea...)

Image Analysis

The original AI in BC

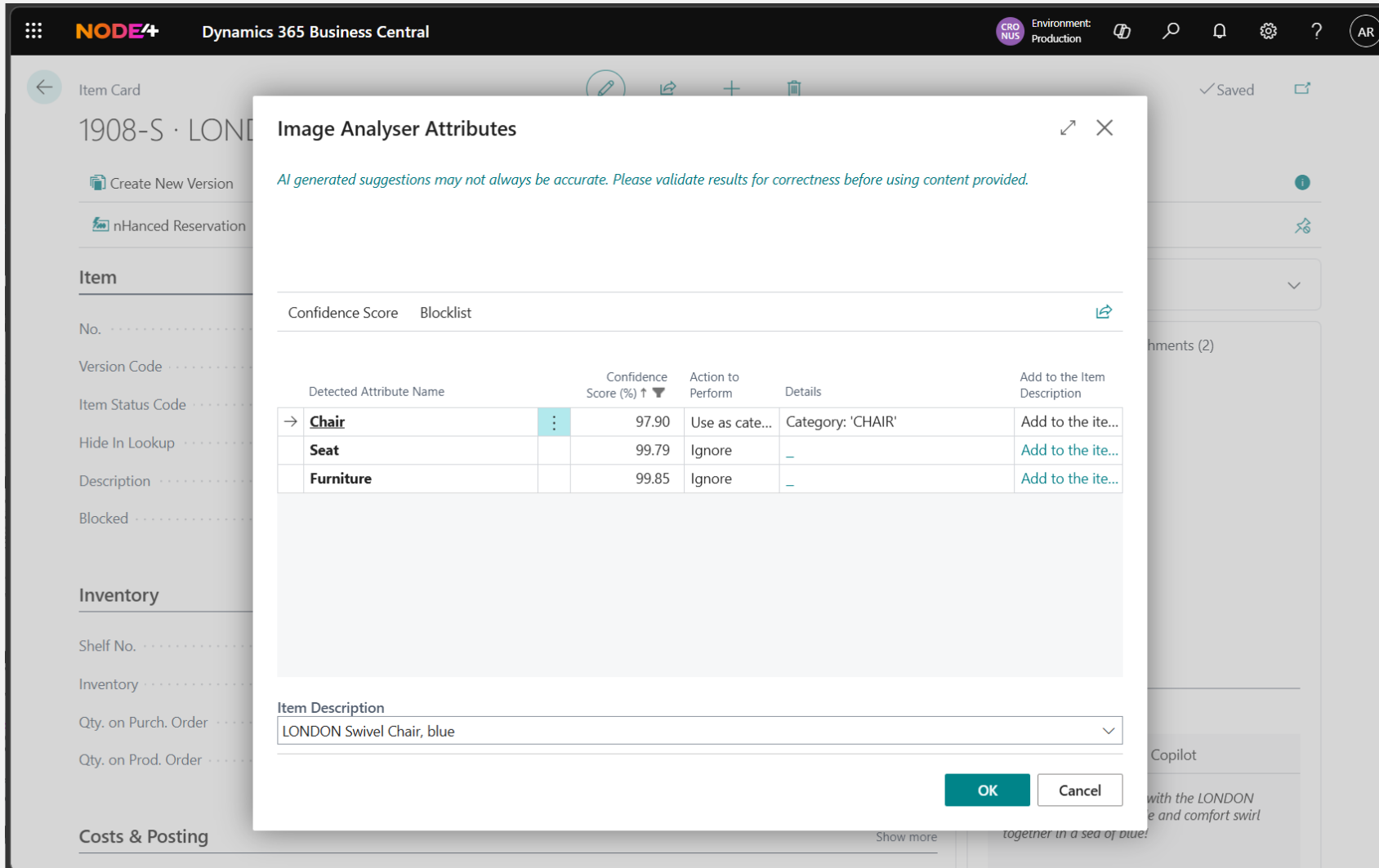


Image Analyser Attributes

AI generated suggestions may not always be accurate. Please validate results for correctness before using content provided.

Confidence Score Blocklist

Detected Attribute Name	Confidence Score (%) ↑ ▼	Action to Perform	Details	Add to the Item Description
→ Chair	97.90	Use as cate...	Category: 'CHAIR'	Add to the ite...
Seat	99.79	Ignore	–	Add to the ite...
Furniture	99.85	Ignore	–	Add to the ite...

Item Description
LONDON Swivel Chair, blue

OK Cancel

Provide the file and AI analyses images to enriches data automatically

- Works on Items to update attributes, and description
- Also works on Contacts to suggest age and gender
(That may or may not be a good idea...)

Image Analysis

The original AI in BC

Image Analyser Attributes

AI generated suggestions may not always be accurate. Please validate results for correctness before using content provided.

Confidence Score Blocklist

Detected Attribute Name	Confidence Score (%) ↑	Action to Perform	Details	Add to the Item Description
Chair	97.90	Use as cate...	Category: 'CHAIR'	Add to the ite...
Seat	99.79	Ignore	-	Add to the ite...
→ Furniture	99.85	Ignore		Add to the ite...

Item Description
LONDON Swivel Chair, blue

OK Cancel

Provide the file and AI analyses images to enriches data automatically

- Works on Items to update attributes, and description
- Also works on Contacts to suggest age and gender
(That may or may not be a good idea...)

Inventory Forecasting

Know before the stockout hits

The screenshot displays the Dynamics 365 Business Central interface for an Item Card. The item is '1920-S · ANTWERP Conference Table'. The 'Inventory' section shows a quantity on hand of 10, with a stockout warning set to 'Default (Yes)'. The 'Costs & Posting' section shows a unit cost of 505.40 and a retail posting group. A 'Forecast' chart is visible on the right, showing demand over time from 11/20/25 to 04/20/26. The chart is a bar chart with a y-axis from 0 to 12 and x-axis labels for dates. The bars show a consistent demand of approximately 10 units per month. The forecast is updated on 11/19/25 and the update was successful.

Section	Field	Value
Item	No.	1920-S
	Description	ANTWERP Conference Table
	Type	Inventory
	Base Unit of Measure	PCS
Inventory	Quantity on Hand	10
	Stockout Warning	Default (Yes)
	Unit Volume	0.9
	Qty. on Sales Order	8
Costs & Posting	Costing Method	FIFO
	Standard Cost	505.40
	Unit Cost	505.40
	Gen. Prod. Posting Group	RETAIL

Date	Forecasted Demand
11/20/25	10
12/20/25	10
01/20/26	10
02/20/26	10
03/20/26	10
04/20/26	10

AI analyses your sales history to predict what you're going to run out of - and when

- Predicts demand from historical sales patterns using multiple models (ARMIA, ETS, STL)
- Surfaces potential stockouts before they happen
- Suggests replenishment orders automatically

*InsightWorks Enhanced Forecasting Worksheet

Item Substitutions

**Because no one has time to do it
manually**

Bank Reconciliation

Residual matching, without the manual effort

Bank Acc. Reconciliation

CHECKING · 83

Home Bank Matching Show Actions Automate Fewer options

Transfer to General Journal... Suggest Lines... Post

Bank Account No. CHECKING Balance Last Statement -1,312.50

Statement No. 83 Statement Ending Balance 0.00

Statement Date 16/04/2026

Bank Statement Lines

Transaction Date	Document No.	Cheque No.	Description
06/04/2020	TRY-001		TREY RESEARCH LTD PAYMENT
06/04/2020	SFA-001		SCHOOL OF FINE ART BACS
06/04/2020	RLC-001		RELECLOUD LIMITED
06/04/2020	SFA-002		SCHOOL OF FINE ART - REF 2
06/04/2020	ALP-001		ALPINE SKI HOUSE LTD
06/05/2020	TRY-002		TREY RESEARCH - PAYMENT

Bank Account Ledger Entries

App...	Posting Date	Document Type	Document No.	Description
→	06/04/2020	Payment	G04001	Trey Research
	06/04/2020	Payment	G04002	School of Fine Art
	06/04/2020	Payment	G04003	Relecloud
	06/04/2020	Payment	G04004	School of Fine Art
	06/04/2020	Payment	G04005	Alpine Ski House
	06/05/2020	Payment	G04006	Trey Research
	06/05/2020	Payment	G04007	School of Fine Art
	06/05/2020	Payment	G04008	School of Fine Art

Total Difference -577,524.74 Total Balance -578,837.24

Reconciled 0.00 Total on Outs... 0.00

Balance -712.02 Total Reconcil... 0.00 Balance -536,583.55 Balance To Re... -534,483.63

After rule-based matching runs, Copilot works through what's left

- Matches residual statement lines to ledger entries
- Suggests G/L accounts for unmatched amounts
- Each suggestion includes a confidence indicator

Bank Reconciliation

Residual matching, without the manual effort

Bank Acc. Reconciliation
CHECKING · 83

Bank Account No. CHECKING
Statement No. 83
Statement Date 16/04/2026

Balance Last Statement -1,312.50
Statement Ending Balance 0.00

Transaction Date	Document No.	Cheque No.	Description
06/04/2020	TRY-001		TREY RESEARCH LTD PAYMENT
06/04/2020	SFA-001		SCHOOL OF FINE ART BACS
06/04/2020	RLC-001		RELECLOUD LIMITED
06/04/2020	SFA-002		SCHOOL OF FINE ART - REF 2
06/04/2020	ALP-001		ALPINE SKI HOUSE LTD
06/05/2020	TRY-002		TREY RESEARCH - PAYMENT

App...	Posting Date	Document Type	Document No.	Description
→	06/04/2020	Payment	G04001	Trey Research
	06/04/2020	Payment	G04002	School of Fine Art
	06/04/2020	Payment	G04003	Relecloud
	06/04/2020	Payment	G04004	School of Fine Art
	06/04/2020	Payment	G04005	Alpine Ski House
	06/05/2020	Payment	G04006	Trey Research
	06/05/2020	Payment	G04007	School of Fine Art
	06/05/2020	Payment	G04008	School of Fine Art

Total Difference -577,524.74
Total Balance -578,837.24
Reconciled 0.00
Balance -712.02
Total Reconcil... 0.00

Total on Outs... 0.00
Balance -536,583.55
Balance To Re... -534,483.63

After rule-based matching runs, Copilot works through what's left

- Matches residual statement lines to ledger entries
- Suggests G/L accounts for unmatched amounts
- Each suggestion includes a confidence indicator

Bank Reconciliation

Residual matching, without the manual effort

The screenshot shows the Dynamics 365 Business Central interface for Bank Account Reconciliation. A modal window titled "Reconciling CHECKING statement 83 for 16/04/26" is displayed over the main reconciliation screen. The modal provides a summary of matching progress and a table of match proposals.

Summary of matching progress:

- Auto-matched: 45 of 52 lines (86.5%)
- Copilot matched: 4 of 52 lines (7.7%)
- 94.2% of lines are matched. Review match proposals.
- Statement Ending Balance: 0.00

Match proposals table:

Transaction Date	Description	Amount to Apply	Proposal
03/12/2024	SCHOOL OF FINE ART - DEC	12,094.80	01/12/24; School of Fine Art; 12,094.80
03/12/2024	PINEWALL RESEARCH - PMT	14,400.00	01/12/24; PineWall Research; 14,400.00
27/06/2023	FIRST UP CONSULTANTS REP 3	-100.00	25/06/23; First Up Consultants; -100.00
13/08/2024	URBAN DESIGNS LTD	2.02	11/08/24; Urban Designs Ltd; 2.02

Buttons: Keep it, Discard it

After rule-based matching runs, Copilot works through what's left

- Matches residual statement lines to ledger entries
- Suggests G/L accounts for unmatched amounts
- Each suggestion includes a confidence indicator

Sales Lines with Copilot

Paste text - get order lines

The screenshot shows the Dynamics 365 Business Central interface for a sales order. The header includes the 'NODE4+' logo, 'Dynamics 365 Business Central', and environment information 'Environment: AR-UD'. The main title is 'Sales Order' with a sub-title '101021 · Trey Research'. A navigation bar contains 'Home', 'Prepare', 'Print/Send', 'Request Approval', 'Order', and 'More options'. Below this is a toolbar with icons for 'Post...', 'Release', 'Create Warehouse Shipment', 'Create Inventory Put-away/Pick...', and 'Archive Document'. The 'General' section contains fields for 'Customer Name' (Trey Research), 'Contact' (Helen Ray), 'Document Date' (01/06/2027), 'Posting Date' (01/06/2027), 'VAT Date' (01/06/2027), 'Order Date' (01/06/2027), 'Due Date' (15/06/2027), 'Requested Delivery Date', 'External Document No.', and 'Status' (Open). The 'Lines' section is highlighted with a blue box, and a Copilot menu is open over it, showing options: 'Manage Line Order', 'Suggest sales lines', and 'Suggest sales lines from file...'. Below the menu is a table with columns: 'Type', 'No.', 'Item Reference No.', 'Description', 'Location Code', 'Quantity', 'Qty. to Assemble to Order', 'Reserved Quantity', 'Unit of Measure Code', and 'Ur'. The first row shows 'Item' with a red asterisk in the 'No.' and 'Description' columns. At the bottom, there are summary fields for 'Subtotal Excl. VAT (GBP)' and 'Total Excl. VAT (GBP)', both showing '0.00'.

Copy text from a customer enquiry, paste it into a sales order, and Copilot suggests the order lines

- Works from emails, lists, any unstructured text
- Matches to items using description and AI search
- You review and confirm - nothing posts without approval

Sales Lines with Copilot

Paste text - get order lines

The screenshot displays the Dynamics 365 Business Central interface for a sales order. The order is for 'Trey Research' (101021) with an order date of 01/06/2027. A 'Suggest Sales Lines' dialog box is open, showing a customer message: 'Hi, we're refitting our boardroom and main office area. We'll need 2 of the Antwerp conference tables, and about 8 of the swivel chairs. We'd also like 1 Athens desk for the reception area and 4 of the Paris guest chairs to go alongside it. If you could get us a quote that would be great.' The dialog has buttons for 'Generate', 'Attach', 'Matching', and 'View'. The background shows the sales order details and a table with columns for Type, No., Item Reference No., Description, Location Code, Quantity, Qty. to Assemble to Order, Reserved Quantity, Unit of Measure Code, and Unit I. The table has a red asterisk in the 'No.' and 'Description' columns. The subtotal and total are both 0.00 GBP.

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit I
→ Item	*		*						

Copy text from a customer enquiry, paste it into a sales order, and Copilot suggests the order lines

- Works from emails, lists, any unstructured text
- Matches to items using description and AI search
- You review and confirm - nothing posts without approval

Sales Lines with Copilot

Paste text - get order lines

The screenshot shows the Dynamics 365 Business Central interface for a sales order. The order is for 'Trey Research' (101021). A Copilot overlay is active, displaying a message: 'Hi, we're refitting our boardroom and main office area. We'll need 2 of the ...'. Below the message is a table of 'Suggested sales lines' with columns for No., Description, Quantity, Unit of Measure Code, Confidence, and Search Terms. The suggested lines are:

No.	Description	Quantity	Unit of Measure Code	Confidence	Search Terms
1920-S	ANTWERP Conference Table	2	PCS	High	(conference, meeting, tab
1980-S	MOSCOW Swivel Chair, red	8	PCS	High	(swivel, rotating, chair), (cl
1896-S	ATHENS Desk	1	PCS	High	(desk, workstation, table),
→ 1900-S	PARIS Guest Chair, black	4	PCS	High	(guest, visitor, chair), (cha

At the bottom of the overlay are buttons for 'Insert', 'Discard', 'Matching', and 'View'. The background shows the sales order grid with a new line being added, marked with a red asterisk.

Copy text from a customer enquiry, paste it into a sales order, and Copilot suggests the order lines

- Works from emails, lists, any unstructured text
- Matches to items using description and AI search
- You review and confirm - nothing posts without approval

Sales Lines with Copilot

Paste text - get order lines

The screenshot shows the Dynamics 365 Business Central interface for a sales order. The header includes the 'NODE4' logo, 'Dynamics 365 Business Central' text, and environment information 'Environment: AR-UD'. The main title is 'Sales Order 101021 · Trey Research'. Below the title are navigation tabs: 'Home', 'Prepare', 'Print/Send', 'Request Approval', 'Order', and 'More options'. A secondary navigation bar contains actions: 'Post...', 'Release', 'Create Warehouse Shipment', 'Create Inventory Put-away/Pick...', and 'Archive Document'. The 'General' section contains fields for Customer Name (Trey Research), Contact (Helen Ray), Document Date (01/06/2027), Posting Date (01/06/2027), VAT Date (01/06/2027), Order Date (01/06/2027), Due Date (15/06/2027), Requested Delivery Date, External Document No., and Status (Open). The 'Lines' section has a table with columns: Type, No., Item Reference No., Description, Location Code, Quantity, Qty. to Assemble to Order, Reserved Quantity, Unit of Measure Code, and Ur. The table contains four rows of items: ANTWERP Conference Table (Qty: 2), MOSCOW Swivel Chair, red (Qty: 8), ATHENS Desk (Qty: 1), and PARIS Guest Chair, black (Qty: 4). A fifth row is partially visible with a dropdown menu open over the 'Item' column, showing a red asterisk in the 'No.' and 'Description' columns.

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Ur
Item	1920-S		ANTWERP Conference Table		2		-	PCS	
Item	1980-S		MOSCOW Swivel Chair, red		8		-	PCS	
Item	1896-S		ATHENS Desk		1		-	PCS	
Item	1900-S		PARIS Guest Chair, black		4		-	PCS	
→ Item	*		*						

Copy text from a customer enquiry, paste it into a sales order, and Copilot suggests the order lines

- Works from emails, lists, any unstructured text
- Matches to items using description and AI search
- You review and confirm - nothing posts without approval

Marketing Text

Item attributes in - marketing text out

The screenshot displays the Dynamics 365 Business Central interface for an item card. The item is identified as '1908-S · LONDON Swivel Chair, blue'. The interface is divided into several sections:

- Item Details:** Fields for No. (1908-S), Type (Inventory), Version Code, Base Unit of Measure (PCS), Item Status Code, Item Category Code (FURNITURE), Hide In Lookup, Variant Mandatory if E... (Default (Yes)), Description (LONDON Swivel Chair, blue), Status, Blocked, and Show on Portal.
- Inventory:** Fields for Shelf No., Qty. on Sales Order (977), Inventory (310), Stockout Warning (Default (Yes)), Qty. on Purch. Order (745), Unit Volume (0.25), Qty. on Prod. Order (0), and Over-Receipt Code.
- Costs & Posting:** A section for managing costs and posting, currently empty.
- Marketing Text:** A section highlighted with a blue border, featuring an 'Edit' button and a 'Draft with Copilot' button. Below these buttons, a generated marketing text snippet is displayed: "Take elegance for a spin with the LONDON Swivel Chair – where style and comfort swirl together in a sea of blue!".

Copilot reads the item's name, category and attributes and writes the product description for you

- Tone is configurable - formal, adventurous, concise
- Edit, regenerate or accept and publish

Marketing Text

Item attributes in - marketing text out

Item Card

1908-S · LONDON Swivel Chair, blue

Describe 'LONDON Swivel Chair, blue' by 'Furniture: Blue, 80 CM, 140 CM, Plastic, Cotton, 200 C...' AI-generated content may be incorrect

Take a spin into comfort with the LONDON Swivel Chair – where style goes full circle!

Transform your living space with the LONDON Swivel Chair in stunning blue – a true statement piece that seamlessly combines modern elegance with everyday practicality. Crafted from a harmonious blend of durable plastic and soft cotton, this chair offers a luxurious seating experience that caters to both your comfort and your sense of style. With generous dimensions of 200 cm in width, 80 cm in depth, and a commanding 140 cm in height, it provides ample lounging space and a striking visual presence. Its versatile swivel function invites you to turn, chat and relax with ease, making it perfect for lively gatherings or tranquil moments alike. Elevate your home with the LONDON Swivel Chair and let its bold blue hue and cutting-edge design inspire you to create a space that truly reflects your vibrant personality.

Keep it Regenerate Cancel Tone Format Emphasis

Copilot reads the item's name, category and attributes and writes the product description for you

- **Tone is configurable - formal, adventurous, concise**
- **Edit, regenerate or accept and publish**

Marketing Text

Item attributes in - marketing text out

Describe 'LONDON Swivel Chair, blue' by 'Furniture: Blue, 80 CM, 140 CM, Plastic, Cotton, 200 C...' AI-generated content may be incorrect [Learn more](#)

Take a spin into comfort with the LONDON Swivel Chair – where style goes full circle!

Transform your living space with the LONDON Swivel Chair in stunning blue – a true statement piece that seamlessly combines modern elegance with everyday practicality. Crafted from a harmonious blend of durable plastic and soft cotton, this chair offers a luxurious seating experience that caters to both your comfort and your sense of style. With generous dimensions of 200 cm in width, 80 cm in depth, and a commanding 140 cm in height, it provides ample lounging space and a striking visual presence. Its versatile swivel function invites you to turn, chat and relax in your home with the LONDON Swivel Chair and let it reflect your vibrant personality.

Formal
Casual
✓ Inspiring
Upbeat
Creative

Regenerate

Keep it Regenerate Cancel Tone Format Emphasis

Copilot reads the item's name, category and attributes and writes the product description for you

- Tone is configurable - formal, adventurous, concise
- Edit, regenerate or accept and publish

And that isn't all of them

**But we only have so
much time**

- **Cash Flow Forecast with Azure AI** - models receivables, payables and bank data to project your cash position forward
- **Late Payment Prediction** - scores open invoices by likelihood of late payment so collections effort goes to the right accounts first
- **E-document matching with Copilot** - maps incoming electronic vendor invoices to purchase order lines, proposes matches and flags exceptions for review
- **Autofill with Copilot** - suggests field values on card and document pages based on your data; can also search the web to fill in contact details like address and phone
- **Number series suggestions** - during setup, proposes consistent numbering formats for documents and records based on your existing conventions
- **Suggest gas emissions** - in sustainability journals, estimates GHG emissions from descriptions and input parameters rather than requiring manual calculation

In-built Assistant

The Assistant

Your data, plain language, no training required

The screenshot shows the Dynamics 365 Business Central interface for Cronus Ltd. The main content area displays a summary: "Insight from last week: The best-selling item was Head and Shoulders Ocean Fresh with 16 units sold". Below this, there are "Actions" for Sales Quote, Purchase Order, Sales Order, and Purchase Quote, along with "Activities" for Sales This Month (£33,428), Overdue Sales Invoice Amount (£148,963,805), and Overdue Purch. Invoice Amount (£15,839,839). On the right, the Copilot chat pane is open, showing a welcome message and three prompt options: "Find", "Explain & Guide", and "Ask".

A chat pane inside BC - ask questions, find records, draft documents, without leaving the page you're on

- Ask, navigate, summarise
- Reads your data, respects your permissions - not connected to the internet
- Limited by design – only knows about, only cares about BC (my kind of assistant)

Headline

Want to learn more about Business Central?

Actions

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice
- > Find entries...
- > New
- > Payments
- > Reports
- Excel Reports
- Power BI Reports

Activities

Sales This Month

£0
> See more

Overdue Sales Invoice Amount

£44,005
> See more

Overdue Purch. Invoice Amount

£100,076
> See more

Sales Invoices Predicted Overdue

0
> See more

Ongoing Sales

Sales Quotes 18	Sales Orders 21	Completely Re... from Stock 0	Sales Invoices 7
--------------------	--------------------	----------------------------------	---------------------

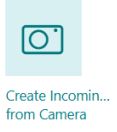
Ongoing Purchases

Purchase Orders 14	Ongoing Purc... Invoices 3	Purch. Invoices... Next Week 0
-----------------------	-------------------------------	-----------------------------------

Payments

Unprocessed Payments 1	Average Collec... Days 0.0	Outstanding V... Invoices 21
---------------------------	-------------------------------	---------------------------------

Scan documents



Create Incomin... from Camera

Incoming Documents

My Incoming Documents
1

User Tasks

My User Tasks

Pending User Tasks
0

Job Queue Tasks

Job Queue Tasks

Tasks Failed 0	Tasks In Process 0	Tasks In Queue 3
-------------------	-----------------------	---------------------

Email Status

Email Activities

Failed Emails in Outbox 0	Draft Emails in Outbox 0	Sent Emails Last 30 Days 2
------------------------------	-----------------------------	-------------------------------

Approvals

Pending Approvals

Requests Sent ... Approval 0	Requests to Approve 0
---------------------------------	--------------------------

Copilot Preview

Hi Adam Rickard,

Welcome back! You can get answers about your company data and assistance with tasks and information.

Find
Look up...

Explain & Guide
Help me understand...

Ask
Please answer...

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

Terms of use | Learn more

View prompts

What's Trey Research's current balance?



Headline

Connect to banks to import bank feeds.

Actions

- + Sales Quote + Purchase Quote > Find entries... > Reports
- + Sales Order + Purchase Order > New Excel Reports
- + Sales Invoice + Purchase Invoice > Payments Power BI Reports

Activities

Sales This Month

£0

> See more

Overdue Sales Invoice Amount

£44,005

> See more

Overdue Purch. Invoice Amount

£100,076

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes 18	Sales Orders 21	Completely Re... from Stock 0	Sales Invoices 7
--------------------	--------------------	----------------------------------	---------------------

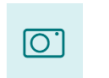
Ongoing Purchases

Purchase Orders 14	Ongoing Purc... Invoices 3	Purch. Invoices... Next Week 0
-----------------------	-------------------------------	-----------------------------------

Payments

Unprocessed Payments 1	Average Collec... Days 0.0	Outstanding V... Invoices 21
---------------------------	-------------------------------	---------------------------------

Scan documents



Create Incomin... from Camera

Incoming Documents

My Incoming Documents
1

User Tasks

My User Tasks

Pending User Tasks
0

Job Queue Tasks

Job Queue Tasks

Tasks Failed 0	Tasks In Process 0	Tasks In Queue 3
-------------------	-----------------------	---------------------

Email Status

Email Activities

Failed Emails in Outbox 0	Draft Emails in Outbox 0	Sent Emails Last 30 Days 2
------------------------------	-----------------------------	-------------------------------

Approvals

Pending Approvals

Requests Sent ... Approval 0	Requests to Approve 0
---------------------------------	--------------------------

Hi Adam Rickard,

Welcome back! You can get answers about your company data and assistance with tasks and information.

- Find Look up...
- Explain & Guide Help me understand...
- Ask Please answer...

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

Terms of use | Learn more

What's Trey Research's current balance?

Working on it ...

Cancel

View prompts

Ask a question

Headline

Want to learn more about Business Central?

Actions

- + Sales Quote
- + Sales Order
- + Sales Invoice
- + Purchase Quote
- + Purchase Order
- + Purchase Invoice
- > Find entries...
- > New
- > Payments
- > Reports
- Excel Reports
- Power BI Reports

Activities

Sales This Month

£0

> See more

Overdue Sales Invoice Amount

£44,005

> See more

Overdue Purch. Invoice Amount

£100,076

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes 18	Sales Orders 21	Completely Re... from Stock 0	Sales Invoices 7
--------------------	--------------------	----------------------------------	---------------------

Ongoing Purchases

Purchase Orders 14	Ongoing Purch... Invoices 3	Purch. Invoices... Next Week 0
-----------------------	--------------------------------	-----------------------------------

Payments

Unprocessed Payments 1	Average Collec... Days 0.0	Outstanding V... Invoices 21
---------------------------	-------------------------------	---------------------------------

Scan documents



Create Incomin... from Camera

Incoming Documents

My Incoming Documents
1

User Tasks

My User Tasks

Pending User Tasks
0

Job Queue Tasks

Job Queue Tasks

Tasks Failed 0	Tasks In Process 0	Tasks In Queue 3
-------------------	-----------------------	---------------------

Email Status

Email Activities

Failed Emails in Outbox 0	Draft Emails in Outbox 0	Sent Emails Last 30 Days 2
------------------------------	-----------------------------	-------------------------------

Approvals

Pending Approvals

Requests Sent ... Approval 0	Requests to Approve 0
---------------------------------	--------------------------

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- Find
Look up...
- Explain & Guide
Help me understand...
- Ask
Please answer...

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

Terms of use | Learn more

What's Trey Research's current balance?

The current balance of Trey Research is \$2,251.80

Trey Research
Customer Card, No.: 20000, Balance (LCY): 2,251.8, Contact Name: Helen Ray, Overdue Balance (LCY): 2,251.8

AI-generated content may be incorrect

1 reference

View prompts

Ask a question

Customer Card

20000 · Trey Research

Home Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Contact Apply Template Merge With... Send Email

General

No.	20000	Credit Limit (LCY)	0.00
Name	Trey Research	Blocked	
Balance (LCY)	2,251.80	Total Sales - Fiscal Year	0.00
Balance (LCY) As Vendor	0.00	Costs (LCY)	0.00
Overdue Balance (LCY)	2,251.80		

Address & Contact

SE1 OAX helen.ray@contoso.com Helen Ray

Invoicing

Bill-to Customer		Prices and Discounts	
VAT Registration No.	GB22222222	Currency Code	
EORI Number		Customer Price Group	
GLN		Customer Disc. Group	
Use GLN in Electronic Documents	<input type="checkbox"/>	Allow Line Disc.	<input checked="" type="checkbox"/>
Copy Sell-to Addr. to Qte From	Company	Invoice Disc. Code	20000
Registration No.		Prices Including VAT	<input checked="" type="checkbox"/>
Posting Details		E-Document Service Participation	0
Gen. Bus. Posting Group	DOMESTIC		
VAT Bus. Posting Group	DOMESTIC		
Customer Posting Group	DOMESTIC		
Allow Multiple Posting Groups	<input type="checkbox"/>		

Payments

14 DAYS

Shipping

Partial

Summary

1 second ago

- This customer has an overdue amount of **2,784.12 GBP**, with a current balance due of **2,251.80 GBP**, indicating outstanding payments.
- Total sales amount to **1,619.40 GBP**, while outstanding orders total **14,452.80 GBP**, showing sales and order values.
- The last payment receipt date is **03/06/2026**, and days since last sale is **436**, indicating recent payment activity and sale timing.


Show more

AI-generated content may be incorrect

Details

Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No. 20000

7	2	2
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	1	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
61	61	0

Copilot

Hi Adam Rickard,

Welcome back! You can get answers about your company data and assistance with tasks and information.

Find Look up...

Explain & Guide Help me understand...

Ask Please answer...

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

Terms of use | Learn more

What's Trey Research's current balance?

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Trey Research
Customer Card, No.: 20000, Balance (LCY): 2,251.8, Contact Name: Helen Ray, Overdue Balance (LCY): 2,251.8

AI-generated content may be incorrect

1 reference

View prompts

Ask a question

General Show more

No.	20000	Credit Limit (LCY)	0.00
Name	Trey Research	Blocked	
Balance (LCY)	2,251.80	Total Sales - Fiscal Year	0.00
Balance (LCY) As Vendor	0.00	Costs (LCY)	0.00
Overdue Balance (LCY)	2,251.80		

Address & Contact SE1 OAX helen.ray@contoso.com Helen Ray

Invoicing Show less

Bill-to Customer		Prices and Discounts	
VAT Registration No.	GB22222222	Currency Code	
EORI Number		Customer Price Group	
GLN		Customer Disc. Group	
Use GLN in Electronic Documents	<input type="checkbox"/>	Allow Line Disc.	<input checked="" type="checkbox"/>
Copy Sell-to Addr. to Qte From	Company	Invoice Disc. Code	20000
Registration No.		Prices Including VAT	<input type="checkbox"/>
Posting Details		E-Document Service Participation	0
Gen. Bus. Posting Group	DOMESTIC		
VAT Bus. Posting Group	DOMESTIC		
Customer Posting Group	DOMESTIC		
Allow Multiple Posting Groups	<input type="checkbox"/>		

Payments 14 DAYS

Shipping Partial

Summary Preview 1 second ago


- This customer has an overdue amount of **2,784.12 GBP**, with a current balance due of **2,251.80 GBP**, indicating outstanding payments.
- Total sales amount to **1,619.40 GBP**, while outstanding orders total **14,452.80 GBP**, showing sales and order values.
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Show more

AI-generated content may be incorrect

Details Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No. 20000

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
7	2	2
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
1	1	0
61	61	0

Copilot Preview

Hi Adam Rickard,

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Find Look up...

Explain & Guide Help me understand...

Ask Please answer...

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Terms of use | Learn more

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Trey Research
 Customer Card, No.: 20000, Balance (LCY): 2,251.8, Contact Name: Helen Ray, Overdue Balance (LCY): 2,251.8

AI-generated content may be incorrect

1 reference

View prompts

What's the outstanding balance across all customers?

Customer Card

20000 · Trey Research

Home Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Contact Apply Template Merge With... Send Email

General

No.	20000	Credit Limit (LCY)	0.00
Name	Trey Research	Blocked	
Balance (LCY)	2,251.80	Total Sales - Fiscal Year	0.00
Balance (LCY) As Vendor	0.00	Costs (LCY)	0.00
Overdue Balance (LCY)	2,251.80		

Address & Contact

SE1 0AX helen.ray@contoso.com Helen Ray

Invoicing

Bill-to Customer		Prices and Discounts	
VAT Registration No.	GB22222222	Currency Code	
EORI Number		Customer Price Group	
GLN		Customer Disc. Group	
Use GLN in Electronic Documents	<input type="checkbox"/>	Allow Line Disc.	<input checked="" type="checkbox"/>
Copy Sell-to Addr. to Qte From	Company	Invoice Disc. Code	20000
Registration No.		Prices Including VAT	<input type="checkbox"/>

Posting Details

Gen. Bus. Posting Group	DOMESTIC
VAT Bus. Posting Group	DOMESTIC
Customer Posting Group	DOMESTIC
Allow Multiple Posting Groups	<input type="checkbox"/>

Payments

14 DAYS

Shipping

Partial

Summary

1 second ago

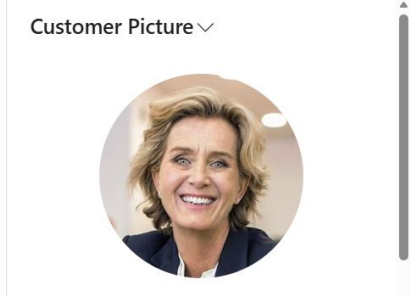
- This customer has an overdue amount of **2,784.12 GBP**, with a current balance due of **2,251.80 GBP**, indicating outstanding payments.
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Show more

AI-generated content may be incorrect

Details

Attachments (0)



Sell-to Customer Sales History

Customer No. 20000

7	2	2
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	1	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
61	61	0

Copilot

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Find Look up...

Explain & Guide Help me understand...

Ask Please answer...

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

Terms of use | Learn more

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Trey Research
Customer Card, No.: 20000, Balance (LCY): 2,251.8, Contact Name: Helen Ray, Overdue Balance (LCY): 2,251.8

AI-generated content may be incorrect

1 reference

What's the outstanding balance across all customers?

Working on it ...

Cancel

View prompts

Ask a question

General Show more

No.	20000	Credit Limit (LCY)	0.00
Name	Trey Research	Blocked	
Balance (LCY)	2,251.80	Total Sales - Fiscal Year	0.00
Balance (LCY) As Vendor	0.00	Costs (LCY)	0.00
Overdue Balance (LCY)	2,251.80		

Address & Contact SE1 OAX helen.ray@contoso.com Helen Ray

Invoicing Show less

Bill-to Customer		Prices and Discounts	
VAT Registration No.	GB22222222	Currency Code	
EORI Number		Customer Price Group	
GLN		Customer Disc. Group	
Use GLN in Electronic Documents	<input type="checkbox"/>	Allow Line Disc.	<input checked="" type="checkbox"/>
Copy Sell-to Addr. to Qte From	Company	Invoice Disc. Code	20000
Registration No.		Prices Including VAT	<input checked="" type="checkbox"/>
Posting Details		E-Document Service Participation	0
Gen. Bus. Posting Group	DOMESTIC		
VAT Bus. Posting Group	DOMESTIC		
Customer Posting Group	DOMESTIC		
Allow Multiple Posting Groups	<input type="checkbox"/>		

Payments 14 DAYS

Shipping Partial

Summary Preview 1 minute ago


- This customer has an overdue amount of **2,784.12 GBP**, with a current balance due of **2,251.80 GBP**, indicating outstanding payments.
- Total sales amount to **1,619.40 GBP**, while outstanding orders total **14,452.80 GBP**, showing sales and order values.
- The last payment receipt date is **03/06/2026**, and days since last sale is **436**, indicating recent payment activity and sale timing.

Show more

AI-generated content may be incorrect

Details Attachments (0)

Customer Picture



Sell-to Customer Sales History

Customer No. 20000

Ongoing Sales Quotes	7	Ongoing Sales Blanket Orders	2	Ongoing Sales Orders	2
Ongoing Sales Invoices	1	Ongoing Sales Return Orders	1	Ongoing Sales Credit Memos	0
	61		61		0

Copilot Preview

Hi Adam Rickard,

Welcome back! You can get answers about your company data and assistance with tasks and information.

Find Look up...

Explain & Guide Help me understand...

Ask Please answer...

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

Terms of use | Learn more

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The current balance of **Trey Research** is **\$2,251.80**.

Trey Research
Customer Card, No.: 20000, Balance (LCY): 2,251.8, Contact Name: Helen Ray, Overdue Balance (LCY): 2,251.8

AI-generated content may be incorrect

1 reference

What's the outstanding balance across all customers?

Sure! You can see the outstanding balance across all customers by using Analysis Assist on the [Customers](#) page.

Open analysis tab

AI-generated content may be incorrect

View prompts

Ask a question

Analysis with Copilot

Explain what you want, AI does the legwork

The screenshot displays the Dynamics 365 Business Central interface. At the top, the header shows 'NODEx Dynamics 365 Business Central' and 'Environment: Production'. The main area is titled 'Customer Ledger Entries' and is in 'Analysis 1' mode. A table of ledger entries is visible, with columns for Posting Date, Document No., Customer No., and Sell-to... A Copilot dialog box is open in the foreground, titled 'Analyse Customer Ledger Entries'. The dialog contains the text: 'Describe the field layout you'd like, and Copilot will get you started'. Below the text is a 'Generate' button and a Copilot icon. The background table shows 15 rows of data, with a total of 1,052 rows. The table columns include Posting Date, Document No., Customer No., and Sell-to... The dialog box also has a 'Learn more' link and a close button.

	Posting Date	Document...	Document...	Document No.	Customer No.	Sell-to...	Association...
1	21/01/2025	21/01/2025	Payment	103638	C00950	C00950	
2	22/01/2020	22/01/2020	Payment	103166	50000	50000	
3	18/01/2020	18/01/2020	Payment	103162	50000	50000	
4	31/01/2019	31/01/2019	Payment	103013	50000	50000	
5	22/01/2020						
6	18/01/2020						
7	23/01/2020						
8	19/01/2020						
9	23/01/2020						
10	19/01/2020						
11	23/01/2020						
12	17/01/2020	17/01/2020	Payment	103161	30000	30000	
13	01/01/2020	01/01/2020	Payment	103158	30000	30000	
14	26/01/2019	26/01/2019	Payment	103012	30000	30000	
15	23/01/2019	23/01/2019	Payment	103009	30000	30000	

In analysis mode, describe how you want the data structured and Copilot configures the tab - no manual pivot setup

- Works on any list page in analysis mode
- Plain language - “customers by country, sorted by outstanding balance”
- Tabs can be saved, tweaked and shared

Value Entries

Find entries... Entry Cost Entries More options

Posting Date	Item Ledger Entry Type	Entry Type	Adj...	Document Type	Document No.	Item Charge No.	Description	Sales Amount (Actual)	Cost Amount (Expected)	Cost Amount (Actual)	Cost Amount (Non-Invtbl)	Cost Posted to G/L	Item Ledger Entry Quantity	Valued Quantity	Invoiced Quantity	Cost per Unit	Cost per Unit (ACY)	Item No.
15/06/2026	Purchase	Direct Cost	<input type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	5,375.00	0.00	5,375.00	50	50	50	107.50	0.00	X-91
15/12/2026	Sale	Direct Cost	<input type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	480.00	0.00	-322.50	0.00	-322.50	-3	-3	-3	107.50	0.00	X-91
15/11/2026	Sale	Direct Cost	<input type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	160.00	0.00	-107.50	0.00	-107.50	-1	-1	-1	107.50	0.00	X-91
15/10/2026	Sale	Direct Cost	<input type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	320.00	0.00	-215.00	0.00	-215.00	-2	-2	-2	107.50	0.00	X-91
02/12/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-4,192.50	0.00	-4,192.50	0	-39	0	107.50	0.00	X-91
02/11/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-4,073.00	0.00	-4,073.00	0	-38	0	107.18421	0.00	X-91
02/10/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,922.00	0.00	-3,922.00	0	-37	0	106.00	0.00	X-91
02/09/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,785.00	0.00	-3,785.00	0	-36	0	105.13889	0.00	X-91
02/08/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,570.00	0.00	-3,570.00	0	-34	0	105.00	0.00	X-91
02/07/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,360.00	0.00	-3,360.00	0	-32	0	105.00	0.00	X-91
02/06/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,255.00	0.00	-3,255.00	0	-31	0	105.00	0.00	X-91
02/05/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,255.00	0.00	-3,255.00	0	-31	0	105.00	0.00	X-91
02/04/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,150.00	0.00	-3,150.00	0	-30	0	105.00	0.00	X-91
02/03/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-3,009.00	0.00	-3,009.00	0	-29	0	103.75862	0.00	X-91
02/02/2026	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,884.00	0.00	-2,884.00	0	-28	0	103.00	0.00	X-91
02/01/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,781.00	0.00	-2,781.00	0	-27	0	103.00	0.00	X-91
02/12/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,678.00	0.00	-2,678.00	0	-26	0	103.00	0.00	X-91
02/11/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,678.00	0.00	-2,678.00	0	-26	0	103.00	0.00	X-91
02/10/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,676.00	0.00	-2,676.00	0	-26	0	102.92308	0.00	X-91
02/09/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,525.00	0.00	-2,525.00	0	-25	0	101.00	0.00	X-91
02/08/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,525.00	0.00	-2,525.00	0	-25	0	101.00	0.00	X-91
02/07/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,424.00	0.00	-2,424.00	0	-24	0	101.00	0.00	X-91
02/06/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,323.00	0.00	-2,323.00	0	-23	0	101.00	0.00	X-91
02/05/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,302.00	0.00	-2,302.00	0	-23	0	100.08696	0.00	X-91
02/04/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,200.00	0.00	-2,200.00	0	-22	0	100.00	0.00	X-91
02/03/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,000.00	0.00	-2,000.00	0	-20	0	100.00	0.00	X-91
02/02/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-1,900.00	0.00	-1,900.00	0	-19	0	100.00	0.00	X-91
02/01/2025	Sale	Direct Cost	<input checked="" type="checkbox"/>		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-1,800.00	0.00	-1,800.00	0	-18	0	100.00	0.00	X-91

	Posting Date	Item Ledger...	Entry Type	Ad...	Document...	Document...	Item Charge...	Description	Sales Amount	Cost Amount	Cost Amount	Cost Amount	Cost Posted to
1	02/01/2025	Sale	Direct Cost	Yes		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,781.00	0.00	-2,781.00
2	02/01/2025	Sale	Direct Cost	Yes		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-1,800.00	0.00	-1,800.00
3	02/01/2025	Sale	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	4,320.00	0.00	0.00	0.00	0.00
4	02/01/2025	Sale	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	2,700.00	0.00	0.00	0.00	0.00
5	01/01/2026	Purchase	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	10,500.00	0.00	10,500.00
6	01/01/2025	Purchase	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	10,000.00	0.00	10,000.00
7	01/01/2026	Sale	Direct Cost	No		LON001		LONDON Swivel Chair, blue	0.00	0.00	0.00	0.00	0.00
8	01/01/2025	Sale	Direct Cost	No		LON001		LONDON Swivel Chair, blue	0.00	0.00	0.00	0.00	0.00
9	01/01/2025	Positive Adjmt.	Direct Cost	No		U0001		Pura Collagen Glow+ 284g (V5) - Unflavour...	0.00	0.00	0.00	0.00	0.00
10	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103658		Hardware	2,500.00	0.00	0.00	0.00	0.00
11	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103657		Licence	1,250.00	0.00	0.00	0.00	0.00
12	01/01/2026	Sale	Direct Cost	No	Sales Shipment	102720		Licence	0.00	0.00	0.00	0.00	0.00
13	01/01/2026	Sale	Direct Cost	No	Sales Credit M...	104014		Hardware	-300.00	0.00	0.00	0.00	0.00
14	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103656		Hardware	300.00	0.00	0.00	0.00	0.00
15	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103655		Hardware	1,000.00	0.00	0.00	0.00	0.00
16	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103654		Licence	250.00	0.00	0.00	0.00	0.00
17	01/01/2026	Sale	Direct Cost	No	Sales Shipment	102716		Licence	0.00	0.00	0.00	0.00	0.00
18	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103653		Hardware	600.00	0.00	0.00	0.00	0.00
19	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103652		Hardware	2,000.00	0.00	0.00	0.00	0.00
20	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103651		Licence	1,250.00	0.00	0.00	0.00	0.00
21	01/01/2026	Sale	Direct Cost	No	Sales Shipment	102712		Licence	0.00	0.00	0.00	0.00	0.00
22	21/01/2025	Sale	Direct Cost	No	Sales Invoice	103638		Deposit Payment	4,175.00	0.00	0.00	0.00	0.00
23	21/01/2025	Sale	Direct Cost	No	Sales Invoice	103637		Blandford Fly	50.00	0.00	0.00	0.00	0.00
24	01/01/2023	Sale	Direct Cost	Yes	Sales Invoice	103369			0.00	0.00	-5.81	0.00	-5.81
25	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	117.50	0.00	117.50
26	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	9.30	0.00	9.30
27	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	925.00	0.00	925.00
28	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	87.50	0.00	87.50
29	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	74.00	0.00	74.00
30	01/01/2024	Sale	Direct Cost	No	Sales Invoice	103534			30.00	0.00	-5.00	0.00	-5.00
8511									24,733,843.23	6,518,917.82	28,028,862.17	-60,968.30	28,028,862.17

Pivot Mode

Search...

Columns

Analysis Filters

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Item Ledger Entry Type
- Entry Type
- Adjustment
- Document Type
- Document No.
- Item Charge No.
- Description
- Sales Amount (Actual)
- Cost Amount (Expect...
- Cost Amount (Actual)
- Cost Amount (Non-In...
- Cost Posted to G/L
- Item Ledger Entry Qu...
- Valued Quantity
- Invoiced Quantity
- Cost per Unit
- Cost per Unit (ACY)
- Item No.
- Gen. Bus. Posting Gro...

Row Groups

Drag here to set row groups

Values

- Sum(Sales Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Posted...)
- Sum(Item Ledger...)

Create new analysis

Value Entries

Analysis 1

	Posting Date	Item Ledger...	Entry Type	Ad...	Document...	Document...	Item Charge...	Description	Sales Amount	Cost Amount	Cost Amount	Cost Amount	Cost Posted to
1	02/01/2025	Sale	Direct Cost	Yes		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,781.00	0.00	-2,781.00
2	02/01/2025	Sale	Direct Cost	Yes		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-1,800.00	0.00	-1,800.00
3	02/01/2025	Sale	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	4,320.00	0.00	0.00	0.00	0.00
4	02/01/2025	Sale	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	2,700.00	0.00	0.00	0.00	0.00
5	01/01/2026	Purchase	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	10,500.00	0.00	10,500.00
6	01/01/2025	Purchase	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	10,000.00	0.00	10,000.00
7	01/01/2026	Sale	Direct Cost	No		LON001		LONDON Swivel Chair, blue	0.00	0.00	0.00	0.00	0.00
8	01/01/2025	Sale	Direct Cost	No		LON001		LONDON Swivel Chair, blue	0.00	0.00	0.00	0.00	0.00
9	01/01/2025	Positive Adjmt.	Direct Cost	No		U0001		Pura Collagen Glow+ 284g (V5) - Unflavour...	0.00	0.00	0.00	0.00	0.00
10	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103658		Hardware	2,500.00	0.00	0.00	0.00	0.00
11	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103657		Licence	1,250.00	0.00	0.00	0.00	0.00
12	01/01/2026	Sale	Direct Cost	No	Sales Shipment				0.00	0.00	0.00	0.00	0.00
13	01/01/2026	Sale	Direct Cost	No	Sales Credit				0.00	0.00	0.00	0.00	0.00
14	01/01/2026	Sale	Direct Cost	No	Sales Invoice				0.00	0.00	0.00	0.00	0.00
15	01/01/2026	Sale	Direct Cost	No	Sales Invoice				0.00	0.00	0.00	0.00	0.00
16	01/01/2026	Sale	Direct Cost	No	Sales Invoice				0.00	0.00	0.00	0.00	0.00
17	01/01/2026	Sale	Direct Cost	No	Sales Shipment				0.00	0.00	0.00	0.00	0.00
18	01/01/2026	Sale	Direct Cost	No	Sales Invoice				0.00	0.00	0.00	0.00	0.00
19	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103652		Hardware	2,000.00	0.00	0.00	0.00	0.00
20	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103651		Licence	1,250.00	0.00	0.00	0.00	0.00
21	01/01/2026	Sale	Direct Cost	No	Sales Shipment	102712		Licence	0.00	0.00	0.00	0.00	0.00
22	21/01/2025	Sale	Direct Cost	No	Sales Invoice	103638		Deposit Payment	4,175.00	0.00	0.00	0.00	0.00
23	21/01/2025	Sale	Direct Cost	No	Sales Invoice	103637		Blandford Fly	50.00	0.00	0.00	0.00	0.00
24	01/01/2023	Sale	Direct Cost	Yes	Sales Invoice	103369			0.00	0.00	-5.81	0.00	-5.81
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27	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	925.00	0.00	925.00
28	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	87.50	0.00	87.50
29	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	74.00	0.00	74.00
30	01/01/2024	Sale	Direct Cost	No	Sales Invoice	103534			30.00	0.00	-5.00	0.00	-5.00
8511									124,733,843.23	6,518,917.82	28,028,862.17	-60,968.30	28,028,862.17

Analyse Value Entries [Learn more](#) ✕

Group by item charge, add the sales amount, and the cost amount

Generate

Pivot Mode

Search...

Columns

Analysis Filters

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Item Ledger Entry Type
- Entry Type
- Adjustment
- Document Type
- Document No.
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- Sales Amount (Actual)
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- Item Ledger Entry Qu...
- Valued Quantity
- Invoiced Quantity
- Cost per Unit
- Cost per Unit (ACY)
- Item No.
- Gen. Bus. Posting Gro...

Row Groups

Drag here to set row groups

Values

- Sum(Sales Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Posted...)
- Sum(Item Ledger...)

Value Entries

Analysis 1

	Posting Date	Item Ledger...	Entry Type	Ad...	Document...	Document...	Item Charge...	Description	Sales Amount	Cost Amount	Cost Amount	Cost Amount	Cost Posted to
1	02/01/2025	Sale	Direct Cost	Yes		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-2,781.00	0.00	-2,781.00
2	02/01/2025	Sale	Direct Cost	Yes		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	-1,800.00	0.00	-1,800.00
3	02/01/2025	Sale	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	4,320.00	0.00	0.00	0.00	0.00
4	02/01/2025	Sale	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	2,700.00	0.00	0.00	0.00	0.00
5	01/01/2026	Purchase	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	10,500.00	0.00	10,500.00
6	01/01/2025	Purchase	Direct Cost	No		LON001		LONDON, Swivel Chair, Blue	0.00	0.00	10,000.00	0.00	10,000.00
7	01/01/2026	Sale	Direct Cost	No		LON001		LONDON Swivel Chair, blue	0.00	0.00	0.00	0.00	0.00
8	01/01/2025	Sale	Direct Cost	No		LON001		LONDON Swivel Chair, blue	0.00	0.00	0.00	0.00	0.00
9	01/01/2025	Positive Adjmt.	Direct Cost	No		U0001		Pura Collagen Glow+ 284g (V5) - Unflavour...	0.00	0.00	0.00	0.00	0.00
10	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103658		Hardware	2,500.00	0.00	0.00	0.00	0.00
11	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103657		Licence	1,250.00	0.00	0.00	0.00	0.00
12	01/01/2026	Sale	Direct Cost	No	Sales Shipment	102720		Licence	0.00	0.00	0.00	0.00	0.00
13	01/01/2026	Sale	Direct Cost	No	Sales Credit M...	104014		Hardware	-300.00	0.00	0.00	0.00	0.00
14	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103656		Hardware	300.00	0.00	0.00	0.00	0.00
15	01/01/2026	Sale	Direct Cost	No	Sales Invoice					0.00	0.00	0.00	0.00
16	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103654		Licence	250.00	0.00	0.00	0.00	0.00
17	01/01/2026	Sale	Direct Cost	No	Sales Shipment	102716		Licence	0.00	0.00	0.00	0.00	0.00
18	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103653		Hardware	600.00	0.00	0.00	0.00	0.00
19	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103652		Hardware	2,000.00	0.00	0.00	0.00	0.00
20	01/01/2026	Sale	Direct Cost	No	Sales Invoice	103651		Licence	1,250.00	0.00	0.00	0.00	0.00
21	01/01/2026	Sale	Direct Cost	No	Sales Shipment	102712		Licence	0.00	0.00	0.00	0.00	0.00
22	21/01/2025	Sale	Direct Cost	No	Sales Invoice	103638		Deposit Payment	4,175.00	0.00	0.00	0.00	0.00
23	21/01/2025	Sale	Direct Cost	No	Sales Invoice	103637		Blandford Fly	50.00	0.00	0.00	0.00	0.00
24	01/01/2023	Sale	Direct Cost	Yes	Sales Invoice	103369			0.00	0.00	-5.81	0.00	-5.81
25	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	117.50	0.00	117.50
26	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	9.30	0.00	9.30
27	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	925.00	0.00	925.00
28	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	87.50	0.00	87.50
29	01/01/2024	Purchase	Direct Cost	No	Purchase Invoice	108679			0.00	0.00	74.00	0.00	74.00
30	01/01/2024	Sale	Direct Cost	No	Sales Invoice	103534			30.00	0.00	-5.00	0.00	-5.00
8511									124,733,843.23	6,518,917.82	28,028,862.17	-60,968.30	28,028,862.17

Preparing the analysis tab

Pivot Mode

Search...

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Item Ledger Entry Type
- Entry Type
- Adjustment
- Document Type
- Document No.
- Item Charge No.
- Description
- Sales Amount (Actual)
- Cost Amount (Expect...
- Cost Amount (Actual)
- Cost Amount (Non-In...
- Cost Posted to G/L
- Item Ledger Entry Qu...
- Valued Quantity
- Invoiced Quantity
- Cost per Unit
- Cost per Unit (ACY)
- Item No.
- Gen. Bus. Posting Gro...

Row Groups

Drag here to set row groups

Values

- Sum(Sales Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Posted...)
- Sum(Item Ledger...)

Value Entries

Analysis 1 | Item charge sales cost

	Item Charge No.	Sum(Sales)	Sum(Cost)	Description	Document...	Document...
1	> P-FREIGHT (73)	0.00	32,037.00			
2	> DUTY (68)	0.00	88,485.42			
3	> P-ALLOWANCE (1)	0.00	750.00			
4	> (Blanks) (8368)	124,733,843.23	27,907,589.75			
5	Total	124,733,843.23	28,028,862.17			

Pivot Mode

Search...

Columns

Analysis Filters

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Item Ledger Entry Type
- Entry Type
- Adjustment
- Item Charge No.
- Sales Amount (Actual)
- Cost Amount (Actual)
- Description
- Document No.
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- Document Type
- Cost Amount (Non-In...
- Cost Posted to G/L
- Item Ledger Entry Qu...
- Valued Quantity
- Invoiced Quantity
- Cost per Unit
- Cost per Unit (ACY)
- Item No.
- Gen. Bus. Posting Gro...

Row Groups

- Item Charge No. [X]

Values

- Sum(Sales Amou... [X]
- Sum(Cost Amou... [X]
- Sum(Cost Amou... [X]
- Sum(Cost Amou... [X]
- Sum(Cost Posted... [X]
- Sum(Item Ledger... [X]

Analysis: Group by item charge, add the sales amount, and the cost amount

AI-generated content may be incorrect

Keep it Discard

Add more details about the analysis

	Item Charge No.	Sum(Sales)	Sum(Cost)	Description	Document...	Document...
1	▼ P-FREIGHT(73)					
2		0.00	0.00	Freight - Quantity	107879	Purchase Recei...
3		0.00	0.00	Freight - Quantity	107879	Purchase Recei...
4		0.00	0.00	Freight - Quantity	107879	Purchase Recei...
5		0.00	0.00	Freight - Quantity	107877	Purchase Recei...
6		0.00	0.00	Freight - Quantity	107877	Purchase Recei...
7		0.00	0.00	Freight - Quantity	107877	Purchase Recei...
8		0.00	0.00	Freight - Quantity	107876	Purchase Recei...
9		0.00	0.00	Freight - Quantity	107876	Purchase Recei...
10		0.00	0.00	Freight - Quantity	107876	Purchase Recei...
11		0.00	0.00	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
12		0.00	54.77	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
13		0.00	0.00	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
14		0.00	34.22	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
15		0.00	0.00	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
16		0.00	39.69	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
17		0.00	0.00	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
18		0.00	28.32	Misc. Freight Charge (Purch.)	108741	Purchase Invoice
19		0.00	0.00	Freight - Quantity	107971	Purchase Recei...
20		0.00	0.00	Freight - Quantity	107971	Purchase Recei...
21		0.00	0.00	Freight - Quantity	107971	Purchase Recei...
22		0.00	0.00	Freight - Quantity	107971	Purchase Recei...
23		0.00	0.00	Misc. Freight Charge (Purch.)	108751	Purchase Invoice
24		0.00	9,226.50	Misc. Freight Charge (Purch.)	108751	Purchase Invoice
25		0.00	0.00	Misc. Freight Charge (Purch.)	108751	Purchase Invoice
26		0.00	13.80	Misc. Freight Charge (Purch.)	108751	Purchase Invoice
27		0.00	0.00	Misc. Freight Charge (Purch.)	108751	Purchase Invoice
28		0.00	6,919.80	Misc. Freight Charge (Purch.)	108751	Purchase Invoice
29		0.00	0.00	Misc. Freight Charge (Purch.)	108751	Purchase Invoice
75	Sub Total P-FREIGHT	0.00	32,037.00			
79	Total	124,733,843.23	28,028,862.17			

Pivot Mode

Search...

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Item Ledger Entry Type
- Entry Type
- Adjustment
- Item Charge No.
- Sales Amount (Actual)
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- Cost per Unit
- Cost per Unit (ACY)
- Item No.
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Row Groups

- Item Charge No.

Values

- Sum(Sales Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Amou...)
- Sum(Cost Posted...)
- Sum(Item Ledger...)

Analysis: Group by item charge, add the sales amount, and the cost amount

AI-generated content may be incorrect

Agents

Sales Order Agent

Enquiry in, quote out, no typing required

Cronus Ltd | < Finance > Cash Management > Sales > Purchasing > | SO PA

Customers Vendors Items Bank Accounts Chart of Accounts

Insight from last week

The largest posted sales invoice was for **£12,450**

Actions

- + Sales Quote > Panels Selection > Reports
- + Sales Order > Find entries... Excel Reports
- + Purchase Quote > New Power BI Reports
- + Purchase Order > Payments

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount
£33,428	£148,963,805	£15,839,839
> See more	> See more	> See more

Sales Invoices Predicted Overdue

0

Copilot Preview

Tasks

Sales Order Agent
Configured by Tom Bevan

Needs attention [Stop all tasks](#)

- #0034 - Review incoming
Email from Microsoft 365
Incoming. Highlights key Microsoft 365 tools like SharePoint, O...

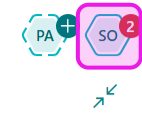
Recent

- #0033 - Completed 3 weeks ago
Email from Sarah Bennett
Outgoing. Provides available boardroom furniture and equipme...
- #0032 - Stopped 3 weeks ago
Email from Sarah Bennett
- #0030 - Completed 3 weeks ago
Email from Tom Bevan
Outgoing. Provides options and availability for boardroom furni...

(+24 tasks)

The agent reads inbound customer emails, identifies the customer and items, and creates a draft quote for review and sending

- Monitors a shared inbox continuously
- Matches customer, items and pricing in BC
- The human role: review and approve



Get started

Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

[Show demo tours](#)

Some features connect to other Microsoft services

Activities

<p>Sales This Month</p> <p>£0</p> <p>See more</p>	<p>Overdue Sales Invoice Amount</p> <p>£44,005</p> <p>See more</p>	<p>Overdue Purch. Invoice Amount</p> <p>£100,076</p> <p>See more</p>	<p>Sales Invoices Predicted Overdue</p> <p>0</p> <p>See more</p>
---	--	--	--

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
2	9	0	7

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
14	3	0

Tasks



Sales Order Agent

- Needs attention
- #0001 - Review incoming
Email from Microsoft Audio Con...
Incoming, Office 365 Audio Conferenci...
 - #0002 - Review incoming
Email from Alicia Thomber
Incoming, Request for a detailed sales ...

Recent
Ongoing and completed tasks will appear here.

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Some features connect to other Microsoft services

Activities

<p>Sales This Month</p> <p>£0</p> <p>> See more</p>	<p>Overdue Sales Invoice Amount</p> <p>£44,005</p> <p>> See more</p>	<p>Overdue Purch. Invoice Amount</p> <p>£100,076</p> <p>> See more</p>	<p>Sales Invoices Predicted Overdue</p> <p>0</p> <p>> See more</p>
--	---	---	---

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
2	9	0	7

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
14	3	0

Copilot Preview

Task #0002: Email from Alicia ...

Now

- Message from aliciat@CRM910116.OnMicrosoft.com

Incoming, Request for a detailed sales quote on specific conference tables and chairs with delivery by October 1, 2025.

This mail was received and is ready for processing.

[Review](#) [Stop task](#)



✓ Saved



Incoming email

Email Details

Show more

Received at 9/17/2025 1:17 PM

From aliciat@CRM910116.OnMicrosoft.com

Customer School of Fine Art

Message

Subject: Request for sales quote - School of Fine Art

Body:

Hello Sales Team -

We are in the midst of an office remodel and would like your input on expected costs for the renovation. I have reviewed your product catalog and are interested in the following items:

- 2 Antwerp conference tables
- 8 Sydney swivel chairs
- 6 Berlin guest chairs

Please provide me with a detailed quote. We expect to have these items delivered by October 1, 2025

Thank you,

Attachments >

Copilot Preview



Task #0002: Review step 1 of 1

↑ Previous step

↓ Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

This mail was received and is ready for processing.

Message from aliciat@CRM910116.OnMicrosoft.com
 Incoming, Request for a detailed sales quote on specific conference tables and chairs with delivery by October 1, 2025.

AI-generated content may be incorrect



✓ Confirm

< Decide later



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Get started

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[Show demo tours](#)

Some features connect to other Microsoft services

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
£0	£44,005	£100,076	0
See more	See more	See more	See more

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
2	9	0	7
See more	See more	See more	See more

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
14	3	0
See more	See more	See more

Task #0002: Email from Alicia ...

Started September 17 at 1:18 PM

Message from aliciat@CRM910116.OnMicrosoft.com

Incoming, Request for a detailed sales quote on specific conference tables and chairs with delivery by October 1, 2025.

Confirmed by Craig Crescas on Wednesday, September 17 at 1:29 PM

Now

Sales Quote Review - School of Fine Art

Sales Quote, Amount: 3,973.2, No.: S-QUO1003, Contact: Alicia Thomber,...

The sales quote S-QUO1003 for School of Fine Art includes 2 Antwerp conference tables, 8 Sydney swivel chairs, and 6 Berlin guest chairs, all scheduled for delivery on October 1, 2025. Please review the quote for accuracy, item details, and pricing before customer confirmation.

[Review](#) [Stop task](#)

S-QUO1003 · School of Fine Art

✕ Sales Order Agent made changes to this page that await review. [Learn more](#)

[Home](#) | [Prepare](#) | [Print/Send](#) | [Request Approval](#) | [Quote](#) | [More options](#)

[Make Order](#) | [Make Invoice](#) | [Release](#) | [Archive Document](#)

External Document No. Requested Delivery Date

Contact Status Open

Document Date

Lines | [Manage](#) | [Line](#) | [Functions](#)

[New Line](#) | [Delete Line](#) | [Select items...](#) | [Insert Ext. Text](#) | [Dimensions](#)

Type	No.	Item Reference No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price E
→ Item	1920-S		ANTWERP Conference Table		2	0	PCS	647
Item	2000-S		SYDNEY Swivel Chair, green		8	0	PCS	190
Item	1936-S		BERLIN Guest Chair, yellow		6	0	PCS	192

Subtotal Excl. Tax (USD)	3,973.20	Total Excl. Tax (USD)	3,973.20
Inv. Discount Amount Excl. Tax (...)	0.00	Total Tax (USD)	198.66
Invoice Discount %	0	Total Incl. Tax (USD)	4,171.86

[Invoice Details >](#)

← Task #0002: Review step 2 of 2

[↑ Previous step](#) | [↓ Next step](#)

charts, and 0 Berlin guest chairs, all scheduled for delivery on October 1, 2025. Please review the quote for accuracy, item details, and pricing before customer confirmation.

Sales Quote Review - School of Fine Art
Sales Quote, Amount: 3,973.2, No.: S-QUO1003, Contact: Alicia Thomber,...

- [DateFilter ..10/01/25](#)
- [QuantityFilter 2](#)
- [Search antwerp conference table](#)
- [Search sydney swivel chair](#)
- [Search berlin guest chair](#)
- [Requested Delivery Date 10/1/2025](#)
- [Lines 6 changes](#)

> Give instructions to the agent

AI-generated content may be incorrect


✓ Confir... | [< Decide I...](#) | ...

Get started ✕

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[Show demo tours](#)



Some features connect to other Microsoft services

Activities ▾

<p>Sales This Month</p> <h2 style="margin: 0;">£0</h2> <p>> See more</p>	<p>Overdue Sales Invoice Amount</p> <h2 style="margin: 0;">£44,005</h2> <p>> See more</p>	<p>Overdue Purch. Invoice Amount</p> <h2 style="margin: 0;">£100,076</h2> <p>> See more</p>	<p>Sales Invoices Predicted Overdue</p> <h2 style="margin: 0;">0</h2> <p>> See more</p>
---	--	--	--

Ongoing Sales

<p>Sales Quotes</p> <h2 style="margin: 0;">3</h2> <p>></p>	<p>Sales Orders</p> <h2 style="margin: 0;">9</h2> <p>></p>	<p>Completely Re... from Stock</p> <h2 style="margin: 0;">0</h2> <p>></p>	<p>Sales Invoices</p> <h2 style="margin: 0;">7</h2> <p>></p>
---	---	--	---

Ongoing Purchases

<p>Purchase Orders</p> <h2 style="margin: 0;">14</h2> <p>></p>	<p>Ongoing Purc... Invoices</p> <h2 style="margin: 0;">3</h2> <p>></p>	<p>Purch. Invoices... Next Week</p> <h2 style="margin: 0;">0</h2> <p>></p>
---	---	---

Copilot Preview 🗨️ 📄 🗑️ ✕

← Task #0002: Email from Alicia ... ◀ ▶

Started September 17 at 1:18 PM

✉️ **Message from aliciat@CRM910116.OnMicrosoft.com**

Incoming, Request for a detailed sales quote on specific conference tables and chairs with delivery by October 1, 2025.

👤 Confirmed by Craig Crescas on Wednesday, September 17 at 1:29 PM

(+2 steps) ▾

Now

✉️ **Message to aliciat@CRM910116.OnMicrosoft.com**

Outgoing, The sales quote details office furniture items with quantities, prices, tax, and total cost, scheduled for delivery by October 1, 2025.

The reply mail is ready to be sent.

[👁️ Review](#) [✕ Stop task](#)



✓ Saved



Outgoing email

Email Details

Show more

To aliciat@CRM910116.OnMicrosoft.com

Customer School of Fine Art

Attachments Show attachments (1)

Message

Dear Ms. Thomber,

Thank you for your interest in our products for your office remodel. Please find below the detailed sales quote for the requested items, scheduled for delivery by Wednesday, October 1, 2025:

Item No.	Description	Quantity	Unit of Measure	Unit Price (USD)	Line Amount (USD)
1920-S	ANTWERP Conference Table	2	PCS	\$647.80	\$1,295.60
2000-S	SYDNEY Swivel Chair, green	8	PCS	\$190.10	\$1,520.80
1936-S	BERLIN Guest Chair, yellow	6	PCS	\$192.80	\$1,156.80



Previous Messages

Attachments >

Task #0002: Review step 4 of 4

↑ Previous step

↓ Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

The reply mail is ready to be sent.

Message to
aliciat@CRM910116.OnMicrosoft.com
 Outgoing, The sales quote details office furniture items with quantities, prices, tax, and total cost, scheduled for delivery by October 1, 2025.

AI-generated content may be incorrect



✓ Confirm

< Decide later



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Sales Quote S-QUO1003

September 3, 2025
Page 1 / 1



School of Fine Art
Alicia Thomber
10 High Tower Green
Miami, FL 37125
USA

CRONUS International Ltd.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA

No.	Description	Quantity	Unit Price Excl. Tax	Tax %	Line Amount Excl. Tax
1920-S	ANTWERP Conference Table	2 Piece	647.80	5	1,295.60
2000-S	SYDNEY Swivel Chair, green	8 Piece	190.10	5	1,520.80
1936-S	BERLIN Guest Chair, yellow	6 Piece	192.80	5	1,156.80
Subtotal					3,973.20
Total Tax					198.66
Total \$ Incl. Tax					4,171.86

Your Reference Valid to Salesperson Payment Terms Shipment Method
 Jim Olive Current Month

Copilot Preview

Task #0002: Review step 4 of 4

Previous step Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

The reply mail is ready to be sent.

The changes below occurred on a different record or page than the one that is currently open.

Message to aliciat@CRM910116.OnMicrosoft.com
 Outgoing, The sales quote details office furniture items with quantities, prices, tax, and total cost, scheduled for delivery by October 1, 2025.

AI-generated content may be incorrect

Confirm **Decide later** ...

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✓ Saved



Outgoing email

Email Details

Show more

To aliciat@CRM910116.OnMicrosoft.com

Customer School of Fine Art

Attachments Show attachments (1)

Message

Dear Ms. Thomber,

Thank you for your interest in our products for your office remodel. Please find below the detailed sales quote for the requested items, scheduled for delivery by Wednesday, October 1, 2025:

Item No.	Description	Quantity	Unit of Measure	Unit Price (USD)	Line Amount (USD)
1920-S	ANTWERP Conference Table	2	PCS	\$647.80	\$1,295.60
2000-S	SYDNEY Swivel Chair, green	8	PCS	\$190.10	\$1,520.80
1936-S	BERLIN Guest Chair, yellow	6	PCS	\$192.80	\$1,156.80



Previous Messages

Attachments >

Task #0002: Review step 4 of 4

↑ Previous step

↓ Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

The reply mail is ready to be sent.

Message to
aliciat@CRM910116.OnMicrosoft.com
 Outgoing, The sales quote details office furniture items with quantities, prices, tax, and total cost, scheduled for delivery by October 1, 2025.

AI-generated content may be incorrect



✓ Confirm

< Decide later



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Get started

Hi, meet Business Central!

You're all set to try out our demo company, Cronus. Go explore on your own, or take a quick tour first.

[Show demo tours](#)

Some features connect to other Microsoft services

Activities

<p>Sales This Month</p> <p>£0</p> <p>> See more</p>	<p>Overdue Sales Invoice Amount</p> <p>£44,005</p> <p>> See more</p>	<p>Overdue Purch. Invoice Amount</p> <p>£100,076</p> <p>> See more</p>	<p>Sales Invoices Predicted Overdue</p> <p>0</p> <p>> See more</p>
--	---	---	---

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
3	9	0	7

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
14	3	0

Copilot Preview

Task #0002: Email from Alicia ...

Started September 17 at 1:18 PM

- Message from aliciat@CRM910116.OnMicrosoft.com

Incoming, Request for a detailed sales quote on specific conference tables and chairs with delivery by October 1, 2025.

Confirmed by Craig Crescas on Wednesday, September 17 at 1:29 PM
- (+2 steps)
- Message to aliciat@CRM910116.OnMicrosoft.com

Outgoing, The sales quote details office furniture items with quantities, prices, tax, and total cost, scheduled for delivery by October 1, 2025.

Confirmed by Craig Crescas on Wednesday, September 17 at 1:37 PM

Ended September 17 at 1:37 PM

Payables Agent

Nobody re-keyed a PDF

The screenshot displays the Dynamics 365 Business Central interface for Cronus Ltd. The main area shows a summary of sales orders, highlighting that the biggest sales order was for £26,000. The left sidebar contains navigation options for Customers, Vendors, Items, Bank Accounts, and Chart of Accounts. Below this, there are sections for 'Insight from last week' and 'Actions' with links to Sales Quote, Sales Order, Purchase Quote, and Purchase Order. The bottom section shows 'Activities' with three key metrics: Sales This Month (£33,428), Overdue Sales Invoice Amount (£148,963,805), and Overdue Purch. Invoice Amount (£15,839,839). On the right, the Copilot task pane is open, showing the 'Payables Agent' task. It includes a 'Needs attention' section with a checkmark and a message: 'If tasks require attention, they will appear here.' Below this is a 'Recent' section listing three tasks, each with a status, a stop time, and an email from Nigel.Hyde@demotnp.onmicrosoft.com. The tasks are #0024 (stopped 3 weeks ago), #0023 (stopped 6 months ago), and #0022 (stopped 6 months ago). A '+3 tasks' link is also visible.

The agent reads supplier invoice emails and attachments, extracts the data, matches the vendor, and creates a draft purchase invoice for review

- Monitors a supplier invoice mailbox
- Reads email body and PDF attachments
- Draft purchase invoice created

SO PA 1 [Icons]

Get started

Thank you for trying Business Central!

Continue exploring the Cronus demo company to learn more.

Back to checklist

Some features connect to other Microsoft services

Activities

Sales This Month

£0

> See more

Overdue Sales Invoice Amount

£44,005

> See more

Overdue Purch. Invoice Amount

£100,076

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
2	9	0	7
>	>	>	>

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
15	3	0
>	>	>

Copilot Preview [Icons]

Tasks



Payables Agent
Configured by Craig Crescas

Needs attention

#0003 - Review incoming
Email from alans@CRM682673....
 Incoming, A purchase invoice needs to...

Recent

#0002 - Stopped 26 minutes ago
Email from MicrosoftExchange3...
 Incoming, An inbound e-document 15 ...

Get started

Thank you for trying Business Central!

Continue exploring the Cronus demo company to learn more.

Back to checklist

Some features connect to other Microsoft services

Activities

<p>Sales This Month</p> <p>£0</p> <p>> See more</p>	<p>Overdue Sales Invoice Amount</p> <p>£44,005</p> <p>> See more</p>	<p>Overdue Purch. Invoice Amount</p> <p>£100,076</p> <p>> See more</p>	<p>Sales Invoices Predicted Overdue</p> <p>0</p> <p>> See more</p>
--	---	---	---

Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
2	9	0	7

Ongoing Purchases

Purchase Orders	Ongoing Purc... Invoices	Purch. Invoices... Next Week
15	3	0

Copilot Preview

Task #0003: Email from alans...

Now

- Message from alans@CRM682673.OnMicrosoft.com

Incoming, A purchase invoice needs to be created for the new inbound e-document 16.

This mail was received and is ready for processing.

Review Stop task



Email Task



✓ Saved



PDF received from email

View e-mail message | View pdf | Actions | Automate | Fewer options

Header

From alans@CRM682673.OnMicrosoft.com Subject Follow up on purchases

Body

Attached is the invoice and estimated costs based on your most recent procurement needs. Let me know if you have any questions or require any additional follow up.

Regards,
Alan Steiner

Task #0003: Review step 1 of 1

Previous step | Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

This mail was received and is ready for processing.

Message from alans@CRM682673.OnMicrosoft.com
Incoming. A purchase invoice needs to be created for the new inbound e-document 16.

AI-generated content may be incorrect [Icons]

Confirm | Decide later | ...

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F **Fabrikam, Inc.**
Premium Coffee & Equipment Solutions

INVOICE
#108245

FROM
Fabrikam, Inc.
10 North Lake Avenue
Atlanta, GA 31772
USA
Phone: +1 425 555 0100
Email: billing@fabrikam.com
VAT Reg: 888-9999

BILL TO
CRONUS International Ltd.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA
Account: 10000

INVOICE DATE	DUE DATE	PAYMENT TERMS
June 4, 2025	June 30, 2025	Current Month

DESCRIPTION	SKU	QTY	UNIT	UNIT COST	AMOUNT
Whole Decaf Beans	WDB-1000	50	Piece	\$5.00	\$250.00
Remote Pump	F-100	50	Piece	\$65.00	\$3,250.00
Shipment, DHL		1		\$60.00	\$60.00

Subtotal	\$3,500.00
Shipping	\$60.00
Total USD	\$3,560.00

Payment Information

Bank: World 1/2 Bank | Account: 99-888-9999 | VAT Reg: 888-9999

All prices include VAT where applicable. Payment due within 30 days as indicated above.

[Navigation icons: back, forward, search, refresh, print, etc.]

[Close] Copilot Preview [Feedback] [Help] [Close]

← Task #0003: Review step 1 of 1

↑ Previous step ↓ Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.


This mail was received and is ready for processing.

Message from
alans@CRM682673.OnMicrosoft.com
Incoming. A purchase invoice needs to be created for the new inbound e-document 16.

AI-generated content may be incorrect [Feedback]

 ...

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Fabrikam, Inc.
Premium Coffee & Equipment Solutions

INVOICE

#108245

FROM

Fabrikam, Inc.
10 North Lake Avenue
Atlanta, GA 31772
USA

Phone: +1 425 555 0100
Email: billing@fabrikam.com
VAT Reg: 888-9999

BILL TO

CRONUS International Ltd.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA

Account: 10000

INVOICE DATE	DUE DATE	PAYMENT TERMS
June 4, 2025	June 30, 2025	Current Month


DESCRIPTION	SKU	QTY	UNIT	UNIT COST	AMOUNT
Whole Decaf Beans	WDB-1000	50	Piece	\$5.00	\$250.00
Remote Pump	F-100	50	Piece	\$65.00	\$3,250.00
Shipment, DHL		1		\$60.00	\$60.00

Subtotal	\$3,500.00
Shipping	\$60.00
Total USD	\$3,560.00


Payment Information
Bank: World Wide Bank | Account: 99-99-888 | Swift: 888-9999
All prices include VAT where applicable. Payment due within terms specified above.

← Task #0003: Email from alans... [Icons]


Started September 5 at 12:24 PM

 **Message from alans@CRM682673.OnMicrosoft.com**

Incoming, A purchase invoice needs to be created for the new inbound e-document 16.

 Confirmed by Craig Crescas on Friday, September 5 at 12:27 PM

Now

 **Review Draft Before Finalization**

Purchase Document Draft, Document Entry No: 16

Please review the draft before purchase document is created.

Review
X Stop task

US_Purchase_Invoice_coffee_w_shipping.pdf - Fabrikam, Inc. - 16

📄 Finalize draft | 📄 View pdf | More options ℹ

General Show more

Finalized Document	<input type="text" value="-"/>	Document No.	<input type="text" value="#108245"/>
Vendor No.	<input type="text" value="10000"/>	Document Date	<input type="text" value="6/4/2025"/>
Vendor Name	<input type="text" value="Fabrikam, Inc."/>	Due Date	<input type="text" value="6/30/2025"/>

Lines Fields for review: 3 | [Manage](#) Line

🔍 New Line | ✖ Delete Line | 🔄 Values from history 🔗 📄

Type	No.	Item Reference No.	Description	Unit of Measure	Variant Code	Quantity	Unit Price	Line Discount	Line
→ Item	ⓘ WDB-1000		Whole Decaf Beans	PCS		50.00	5.00	0.00	
Item	ⓘ F-100		Remote Pump	PCS		50.00	65.00	0.00	⋮
G/L Account	ⓘ 62210		Shipment, DHL			1.00	60.00	0.00	

Amount Incl. VAT	<input type="text" value="3,560.00"/>	Currency Code	<input type="text" value="USD"/>
Amount Excl. VAT	<input type="text" value="3,560.00"/>		

← Task #0003: Review step 2 of 2

↑ Previous step | ↓ Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

Please review the draft before purchase document is created.

📄 **Review Draft Before Finalization**
Purchase Document Draft, Document Entry No: 16

> Additional instructions

AI-generated content may be incorrect 👍 🗨

⋮

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US_Purchase_Invoice_coffee_w_shipping.pdf - Fabrikam, Inc. - 16

📄 Finalize draft 📄 View pdf | More options ℹ️

General Show more

Finalized Document	_____	Document No.	#108245
Vendor No.	10000	Document Date	6/4/2025
Vendor Name	Fabrikam, Inc.	Due Date	6/30/2025

Payables Agent Preview

The Payables Agent uses AI to create document drafts. Review and update to ensure accuracy before you finalize.

[See terms](#) [Learn more](#)

Continue

from history 🔗

Reference	Description	Unit of Measure	Variant Code	Quantity	Unit Price	Line Discount	Line
→ Item	WDB-1	PCS		50.00	5.00	0.00	
Item	F-100	PCS		50.00	65.00	0.00	
G/L Account	62210			1.00	60.00	0.00	

Amount Incl. VAT	3,560.00	Currency Code	USD
Amount Excl. VAT	3,560.00		

← Task #0003: Review step 2 of 2

↑ Previous step ↓ Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

Please review the draft before purchase document is created.

📄 **Review Draft Before Finalization**
Purchase Document Draft, Document Entry No: 16


> Additional instructions

AI-generated content may be incorrect 👍 👎



✓ Confirm ⏪ Decide later ⋮

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US_Purchase_Invoice_coffee_w_shipping.pdf - Fabrikam, Inc. - 16





 Finalize draft |  View pdf | More options 

General Show more

Finalized Document	<input type="text" value="-"/>	Document No.	<input type="text" value="#108245"/>
Vendor No.	<input type="text" value="10000"/>	Document Date	<input type="text" value="6/4/2025"/> 
Vendor Name	<input type="text" value="Fabrikam, Inc."/>	Due Date	<input type="text" value="6/30/2025"/> 

Lines Fields for review: 3 | [Manage](#) Line

 New Line |  Delete Line |  Values from history 

Type	No.	Item Reference No.	Description	Unit of Measure	Variant Code	Quantity	Unit Price	Line Discount	Line
→ Item	 WDB-1000		Whole Decaf Beans	PCS		50.00	5.00	0.00	
Item	 F-100		Remote Pump	PCS		50.00	65.00	0.00	
G/L Account	 62210		Shipment, DHL			1.00	60.00	0.00	


Amount Incl. VAT	<input type="text" value="3,560.00"/>	Currency Code	<input type="text" value="USD"/>
Amount Excl. VAT	<input type="text" value="3,560.00"/>		

← Task #0003: Review step 2 of 2



↑ Previous step ↓ Next step

Review the page and step details to ensure correctness. When you confirm, the agent proceeds with the task.

Please review the draft before purchase document is created.

 **Review Draft Before Finalization**
Purchase Document Draft, Document Entry No: 16

> Additional instructions

AI-generated content may be incorrect  

✓ Confirm
< Decide later
⋮

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F **Fabrikam, Inc.**
Premium Coffee & Equipment Solutions

INVOICE
#108245

FROM
Fabrikam, Inc.
10 North Lake Avenue
Atlanta, GA 31772
USA

Phone: +1 425 555 0100
Email: billing@fabrikam.com
VAT Reg: 888-9999

BILL TO
CRONUS International Ltd.
7122 South Ashford Street
Westminster
Atlanta, GA 31772
USA

Account: 10000

INVOICE DATE	DUE DATE	PAYMENT TERMS
June 4, 2025	June 30, 2025	Current Month

DESCRIPTION	SKU	QTY	UNIT	UNIT COST	AMOUNT
Whole Decaf Beans	WDB-1000	50	Piece	\$5.00	\$250.00
Remote Pump	F-100	50	Piece	\$65.00	\$3,250.00
Shipment, DHL		1		\$60.00	\$60.00

Subtotal	\$3,500.00
Shipping	\$60.00
Total USD	\$3,560.00

Payment Information
Bank: World Wide Bank | Account: 99-99-888 | Swift: 888-9999
All prices include VAT where applicable. Payment due within terms specified above.

← Task #0003: Email from alans... [Previous] [Next]

Started September 5 at 12:24 PM

✓ [Envelope] **Message from alans@CRM682673.OnMicrosoft.com**
Incoming, A purchase invoice needs to be created for the new inbound e-document 16.
[User] **Confirmed by Craig Crescas on Friday, September 5 at 12:27 PM**

(+1 step) [Dropdown Arrow]

✓ [Document] **Finalize draft**
Purchase Invoice, Vendor Name: Fabrikam, Inc., No.: 107222, Amount...

Ended September 5 at 12:31 PM



Purchase Invoice



107222 · Fabrikam, Inc.

Home Prepare Request Approval Invoice E-Document More options

Post Release Get Vendor Subscription Contract Lines

General

Show more

Vendor Name	Fabrikam, Inc.	Vendor Invoice No.	#108245
Contact	Krystal York	Status	Open
Document Date	6/4/2025	Doc. Amount Incl. Tax	3,560.00
Posting Date	7/31/2025	Doc. Amount Tax	0.00
Due Date	6/30/2025		

Lines Manage Line

Select items... New Line Delete Line

Type	No.	Item Reference No.	Description/Comment	Attach... to Subscr... Contr... line	Location Code	Sustainability Account No.	Quantity	Unit of Measure Code	Dir
→ Item	:	WDB-1000	Whole Decaf Beans	No			50	PCS	
Item		F-100	Remote Pump	No			50	PCS	
G/L Account		62210	Shipment, DHL	No			1		

Subtotal Excl. Tax (USD)	3,560.00	Total Excl. Tax (USD)	3,560.00
Inv. Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	3,560.00

← Task #0003: Review step 3 of 3

↑ Previous step ↓ Next step

The agent suggested values that were used as part of the step.

Finalize draft
 Purchase Invoice, Vendor Name: Fabrikam, Inc., No.: 107222, Amount Including Tax: 3,560
 AI-generated content may be incorrect

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Purchase Invoice



107222 · Fabrikam, Inc.

Home Prepare Request Approval Invoice E-Document More options



Open E-Document Draft View E-Document Source



General

Show more

Vendor Name	Fabrikam, Inc.	Vendor Invoice No.	#108245
Contact	Krystal York	Status	Open
Document Date	6/4/2025	Doc. Amount Incl. Tax	3,560.00
Posting Date	7/31/2025	Doc. Amount Tax	0.00
Due Date	6/30/2025		

Lines Manage Line

Select items... New Line Delete Line

Type	No.	Item Reference No.	Description/Comment	Attach... to Subscr... Contr... line	Location Code	Sustainability Account No.	Quantity	Unit of Measure Code	Dir
→ Item	:	WDB-1000	Whole_Decaf_Beans	No			50	PCS	
Item		F-100	Remote Pump	No			50	PCS	
G/L Account		62210	Shipment, DHL	No			1		

Subtotal Excl. Tax (USD)	3,560.00	Total Excl. Tax (USD)	3,560.00
Inv. Discount Amount (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	3,560.00

Task #0003: Review step 3 of 3

Previous step Next step

The agent suggested values that were used as part of the step.

Finalize draft
 Purchase Invoice, Vendor Name: Fabrikam, Inc., No.: 107222, Amount Including Tax: 3,560
 AI-generated content may be incorrect

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Why not Continia?

It depends...

The Agent Designer

You get an agent! And you get an agent!

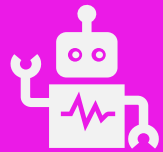
Everyone gets agents!

Demo

Agent Designer

Agents as specialists

The more you ask one agent to do, the worse it performs



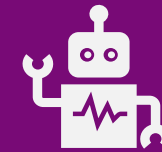
Sales Agent

Drafts the quote



Salesperson

Reviews and decides

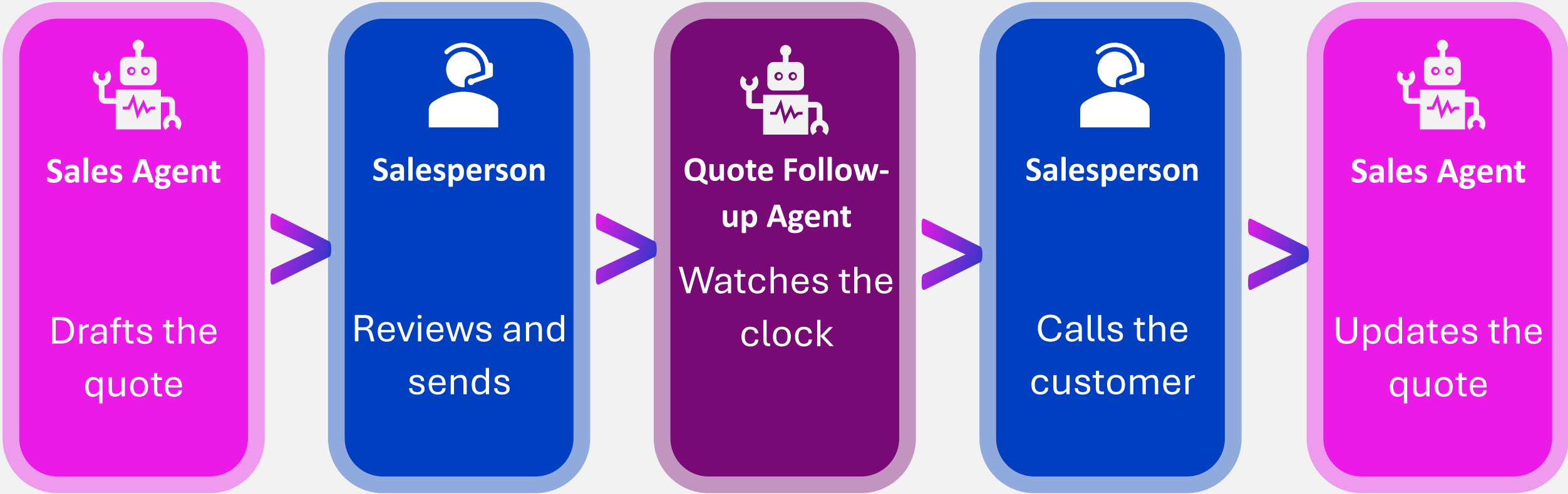


Quote Follow-up Agent

Watches the clock

One enquiry, end to end

A team, passing the work between them



MCP Server

The best thing you didn't even know
you needed

What exactly *is* an MCP server?

Model Context Protocol

- MCP is universal standard that allows AI assistants to connect to external systems and data sources in a structured, secure way
- Business Central now has an MCP server, which means BC data and functionality can be accessed by compatible AI tools
- That means an AI assistant outside BC - such as Copilot, ChatGPT, Claude etc.- can query your Business Central data, look up records, and surface information without needing bespoke integration work
- Your ERP becomes a data source that AI can natively understand and interact with

MCP Setup

A handful of clicks – quite a lot of thought

The screenshot shows the 'Model Context Protocol (MCP) Server Configuration' page in Dynamics 365 Business Central. The page title is 'Userday Example'. The 'General' section includes the following settings:

- Name: Userday Example
- Active:
- Dynamic Tool Mode:
- Discover Additional Objects:
- Description: [Empty text box]
- Unblock Edit Tools:

Below the settings, there is a note: "In Static Tool Mode, objects in the available tools will be directly exposed to clients. You can manage these tools by adding, modifying, or removing them from the configuration."

The 'Available Tools' section contains a table with the following data:

Object Type ↑	Object ID ↑	Object Name	API Version	Allow Read	Allow Create	Allow Modify	Allow Delete	Allow Bound Actio...
→ Page	30008	APIV2 - Items	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Page	30009	APIV2 - Customers	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Page	30010	APIV2 - Vendors	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Page	30011	APIV2 - Company Information	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Page	30012	APIV2 - Sales Invoices	v2.0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

A single page for each MCP server configuration

- Granular control of what the MCP is allowed access to
- Irrelevant of the MCP configuration – it always uses user permissions as a back stop

Demo

MCP with Claude

Costs

What does it all cost?

Copilot Credits

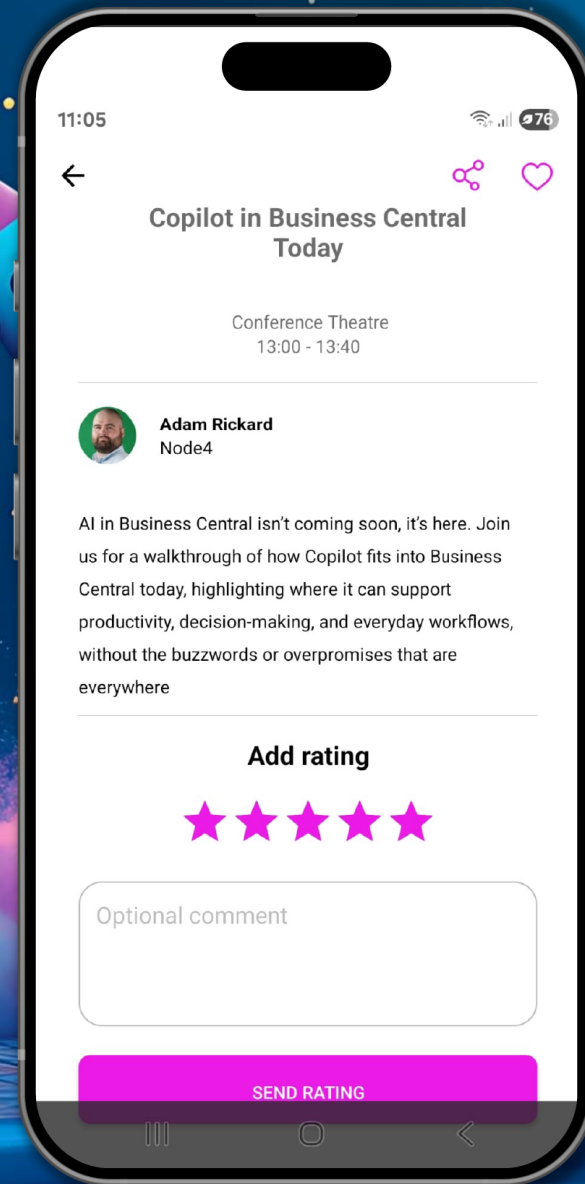
- The assistant, analysis tabs, bank rec, marketing text, sales lines, item substitutions, summarise, all discrete features, as well as MCP - is included with the BC license
- Agents are the only category with a consumption cost - billed in Copilot Credits at USD \$0.01 per credit pay-as-you-go, or prepaid for up to 20% discount
 - **Payables Agent:** 50 credits per invoice PDF plus 5 per invoice line. A typical 3-line invoice is 65 credits; 100 invoices a month is approximately 6,500 credits (\$65/£51)
 - **Sales Order Agent:** 14 credits per request as the base - rising to 19 if the email includes an attachment; 100 requests a month is approximately 1,650 credits (\$16.50/£13)

Final Thoughts



Loved it? Learned something? Have opinions?

Head to the app and share your thoughts - honesty encouraged



Thank You.

