

# Grow your business and supercharge operations with the power of AI

Microsoft Dynamics 365 Business Central



Business expectations are shifting, and companies need to adapt now to seize the opportunity



Macroeconomic uncertainty has impacted planning and shifted business priorities for many organizations



Talent acquisition and retention has limited companies' ability to scale and meet demand



Connectivity of systems, processes, and data is becoming a key test of businesses' ability to own the digital age



AI is challenging forward-looking leaders to embrace new ways of thinking about every workflow and resource in an organization

# How can the right system unlock growth?



**Make better business decisions** with robust reporting available at your fingertips from anywhere



**Eliminate manual workarounds** with AI-powered systems and workflows contoured to how you work



**Automate key processes using AI** to ensure your time is spent on building strategy and growing business, not staring at spreadsheets



**Comply with financial regulations and requirements** to ensure compliance and with the ease of automated reporting



**Enhance digital security** and equip your workforce with global access on your terms



**Boost productivity** by natively integrating to the complete Microsoft ecosystem

# Meet the future with Dynamics 365 Business Central

Move to the cloud with Business Central, an easy-to-use ERP solution that enables you to **adapt faster, work smarter, and perform better**



## Adapt faster

**Transform business operations** with the security, flexibility, and scalability of the Microsoft cloud solution that grows with your business.



## Work smarter

**Empower people with a single source of truth for finance and operations** so your entire business can grow without many of the traditional resource restraints that hold back businesses.



## Perform better

**Perform better with AI-powered workflows and timely data** that drive continuous process optimization, accelerate financial close, and improve decision-making.

# Business Central Supercharges SMBs with AI

## A rock-solid ERP foundation

for small and medium businesses



## Enhanced and extended

with more than 7,000 solutions on AppSource

## Mapped to your processes

through the expertise and effort of our partners

## Automated

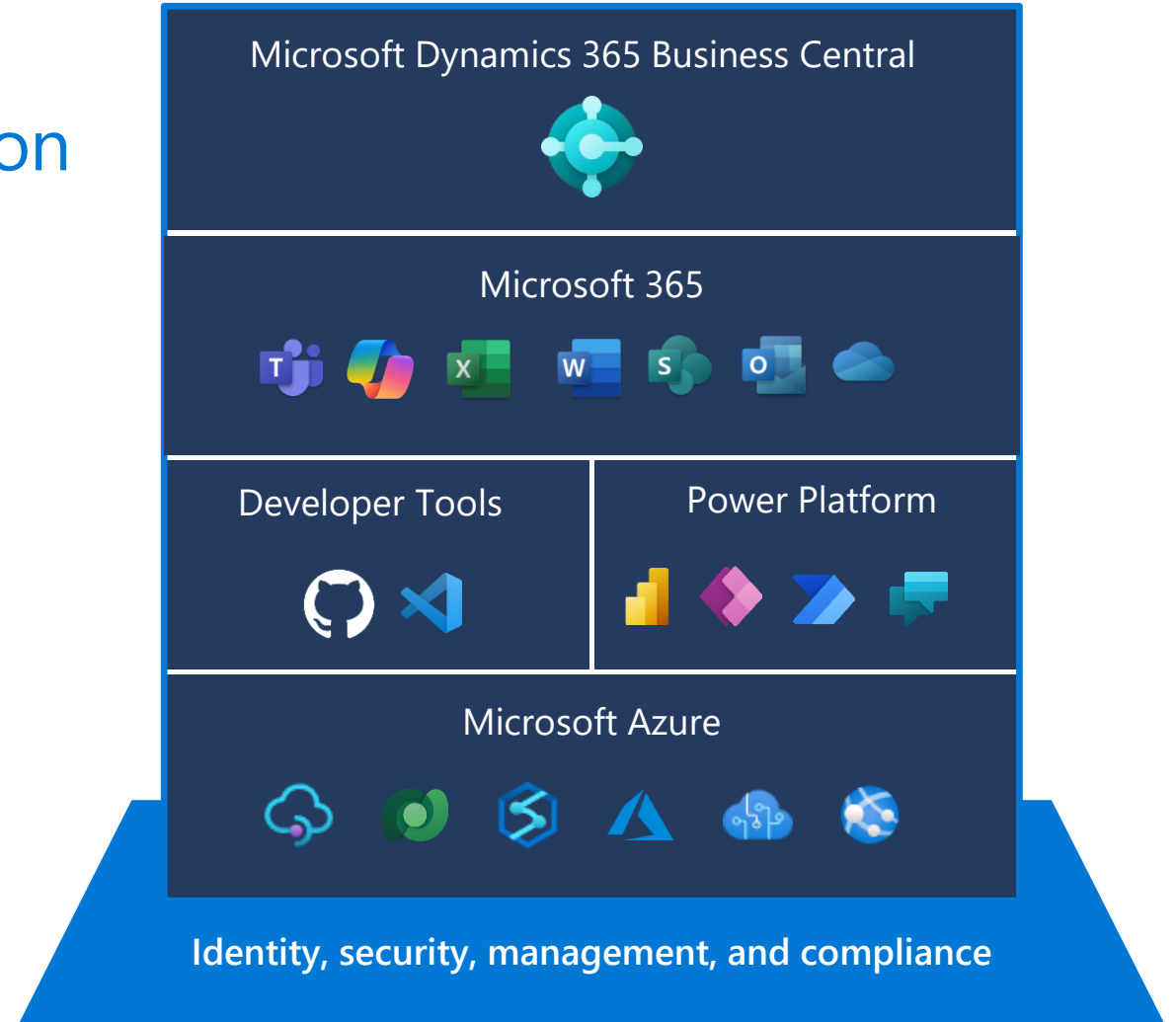
with the power of prebuilt and custom agents

## Integrated natively

through the entire Microsoft ecosystem

# Dynamics 365 Business Central outcompetes with a fully integrated, AI-powered stack, on the world's most trusted and comprehensive cloud

- Works seamlessly with the Microsoft applications you already use and know – Outlook, Teams, Excel and Power Platform
- AI infused throughout the solution brings you continuous insights to speed decision making
- A single system that works across international locations
- Scalable and extensible to grow and adapt with your growing business



# Realize end-to-end business management with Business Central

|                                                                                   |                                                                                   |                                                                                    |                                                                                     |                                                                                     |                                                                                     |                                                                                     |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|  |  |  |  |  |  |  |
| Customer Service                                                                  | Sales                                                                             | Finance                                                                            | Marketing                                                                           | Inventory/Supply                                                                    | Purchasing                                                                          | Manufacturing                                                                       |
| Planning & Dispatch                                                               | Contacts                                                                          | General Ledger                                                                     | Campaigns                                                                           | Inventory control                                                                   | Purchase invoicing                                                                  | Assembly management                                                                 |
| Service contracts                                                                 | Sales invoices                                                                    | Budgeting                                                                          | Email logging                                                                       | Item tracking                                                                       | Purchase orders                                                                     | Cost worksheet                                                                      |
| Service orders                                                                    | Sales orders                                                                      | Financial reporting                                                                | Interaction logging                                                                 | Supply planning                                                                     | Return orders                                                                       | Bill of materials                                                                   |
| Service prices                                                                    | Dynamics 365 Sales integration                                                    | Bank reconciliation                                                                | Pricing                                                                             | Demand forecasting                                                                  | Resourcing                                                                          | Capacity planning                                                                   |
|                                                                                   | Sales Opportunities                                                               | Asset management                                                                   | Sales enablement                                                                    | Sales and inventory forecasting                                                     | Addresses                                                                           | Machine centers                                                                     |
|                                                                                   | Discounting                                                                       | Cost accounting                                                                    |                                                                                     | Warehouse shipments                                                                 | Purchase discounts                                                                  | Version management                                                                  |

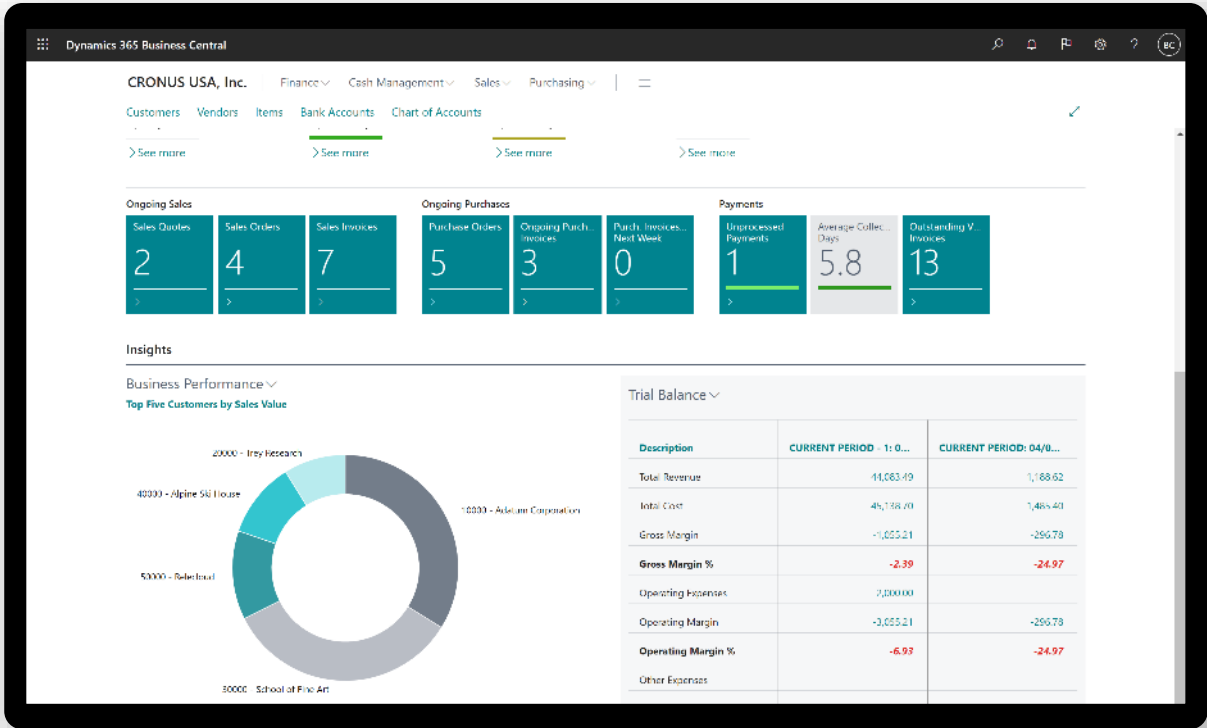
[Jump to detailed capabilities overview](#)

# Increase financial visibility and performance

Take control of your financial data

Improve forecasting, accelerate financial close, and get real-time performance metrics while fostering compliance and security

Use Copilot in Business Central, built-in reports, Excel, or Microsoft Power BI and unlimited data dimensions to analyze trends and improve business planning

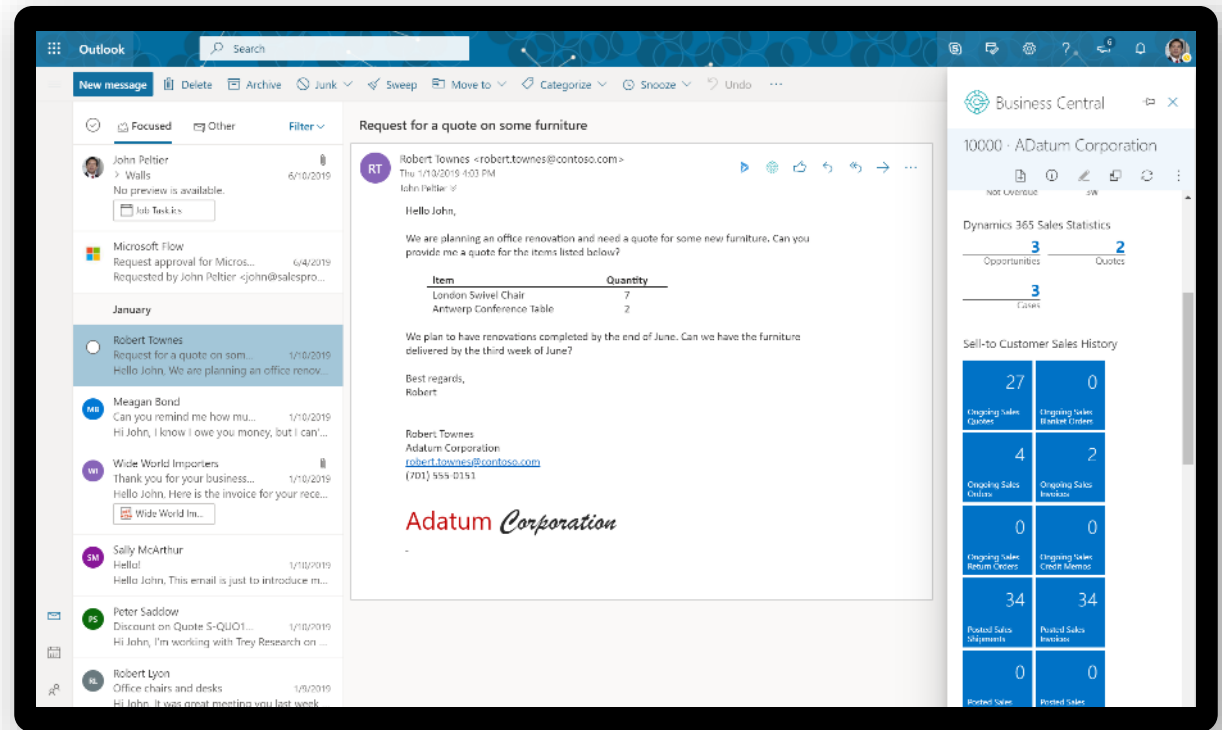


# Boost sales and improve customer service

## Build long-lasting relationships

Take better care of customers while managing the entire sales process from within Microsoft Outlook and deliver better outcomes with connected service operations

Drive sales with marketing text suggestions from Copilot, transition smoothly from sales to service, and manage service agreements to exceed customer expectations

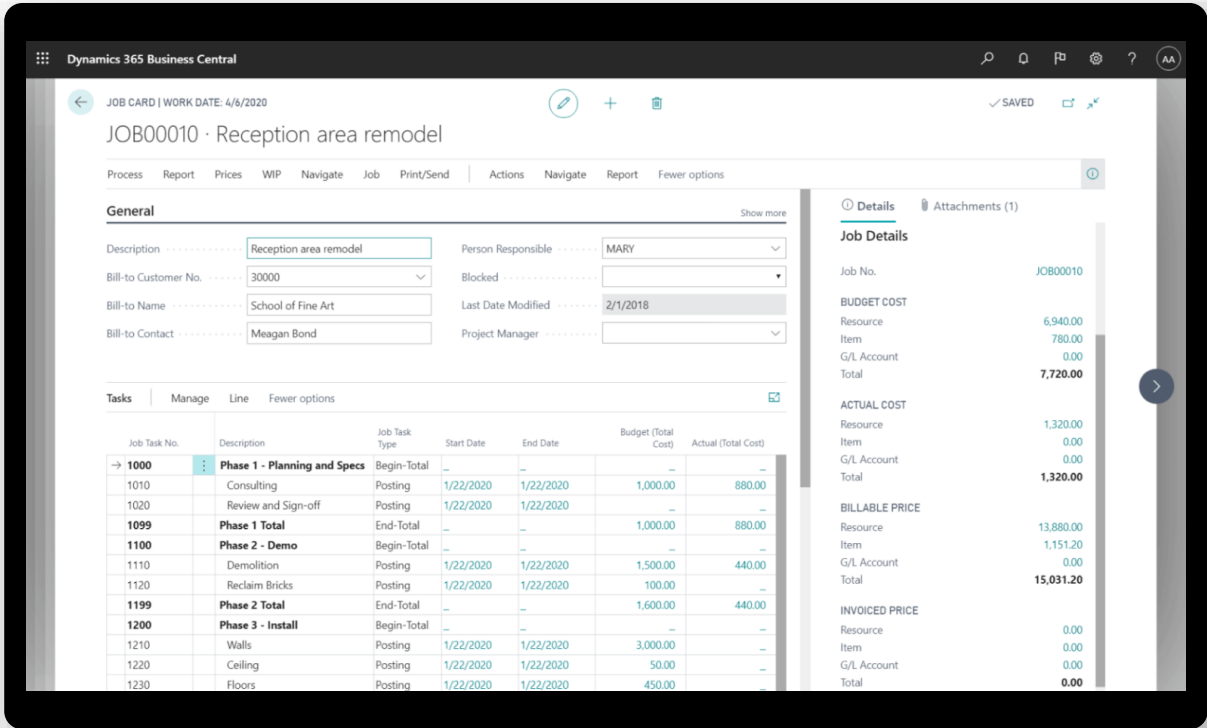


# Finish projects on time and under budget

Successful projects start with proper planning

Complete projects successfully and profitably with planning, resourcing, tracking, costing, billing, accounting, and timely intelligence

Enable employees to do their best work with role-based access, and foster collaboration by sharing links to projects directly in Microsoft Teams

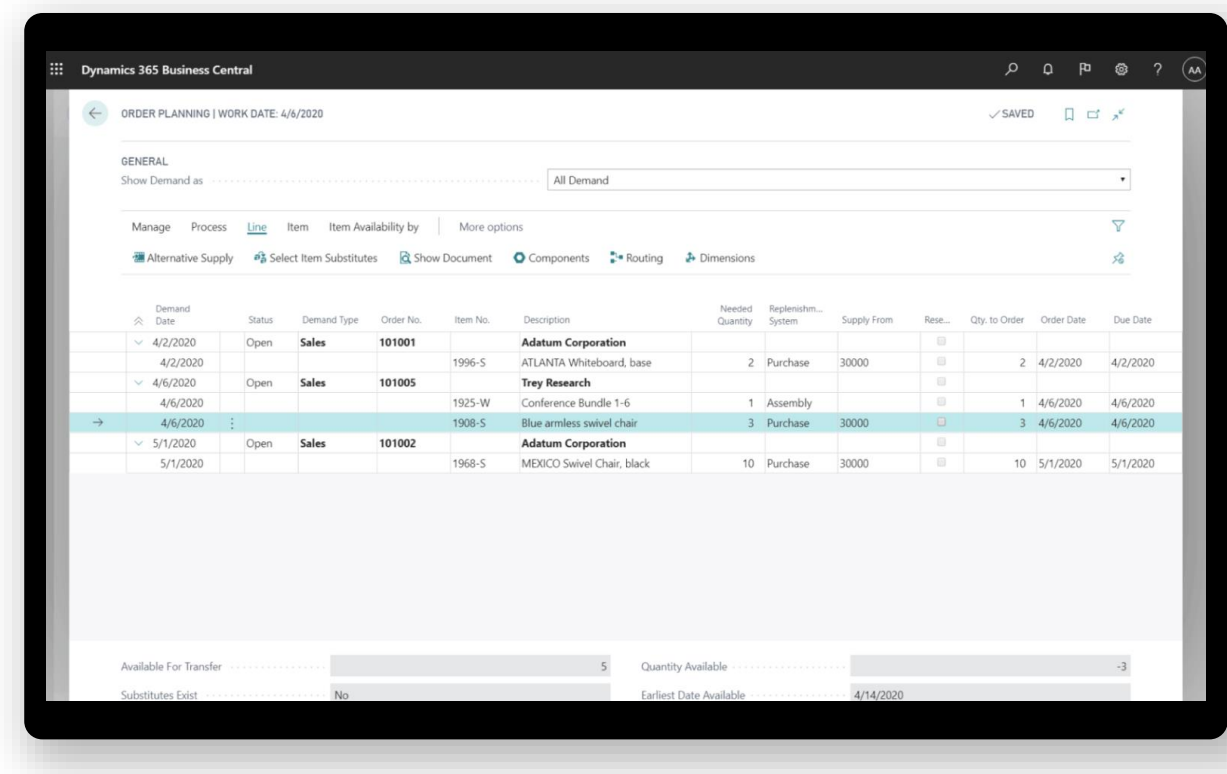


# Optimize inventory and supply chain management

## End-to-end visibility for better results

Deliver products on time and adapt to changing business models with visibility across purchasing, manufacturing, inventory, and warehouses

Move from manual forecasting and inventory management to AI-based predictive forecasting to improve accuracy



# Tailor-made for SMBs, with the full power of Microsoft AI

Decades  
of research &  
development

Committed to  
advancing  
Responsible AI

Secure  
from  
the start

Reliability &  
performance at scale  
for large AI models

**Runs on trust**

**Your data is your data**

# The power of AI in Business Central

## Copilot and the agentic ecosystem

### Agents (consumption-based pricing)



Sales Order agent



Payables agent



More prebuilt  
agents coming  
soon



Custom agents from Agent  
Builder, Copilot Studio, Azure  
Foundry, ISVs

### Copilot in Business Central (included)



Analysis  
assist



Chat with  
Copilot



Summarize



Marketing &  
Sales Suggestion



Bank account  
reconciliation

### Copilot Extended

Microsoft 365  
Copilot



Copilot Studio



Power  
Automate



Azure AI Foundry



Power Apps



...and more

# Copilot in Business Central

What can Copilot do for you?



## Guide

Explains concepts and helps you learn new skills



## Find

Locates records and pages, finds matching products based on natural language inquiries or similar products



## Compare

Reconciles bank statements and incoming e-documents



## Analyze

Organizes data to help you get to insights faster



## Suggest

Drafts product descriptions, suggests numbering pattern setup for records

Your AI-powered assistant with a growing skillset

# Copilot in Business Central

Get to key insights faster

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

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

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

Prepares the analysis tab

Adjust and iterate on your layout

Dynamics 365 Business Central

Contoso Coffee | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customer Ledger Entries: All | Edit List | Home | Entry | More options

| Posting Date | Document Date | Document Type | Document No. | Customer No. | Customer Name | Description         | Original Amount | Department Code | Customer Code |
|--------------|---------------|---------------|--------------|--------------|---------------|---------------------|-----------------|-----------------|---------------|
| 3/31/2024    | 3/31/2024     | Invoice       | PS-INV103184 | 50000        | Relecloud     | Invoice S-INV102197 | 3,081.84        | SALES           | MEDIUM        |
| 3/23/2024    | 3/23/2024     | Payment       | PS-INV103184 | 50000        | Relecloud     | Invoice S-INV102192 | -4,596.16       | SALES           | MEDIUM        |
| 3/23/2024    | 3/23/2024     | Invoice       | PS-INV103192 | 50000        | Relecloud     | Invoice S-INV102192 | 4,596.16        | SALES           | MEDIUM        |
| 3/19/2024    | 3/19/2024     | Payment       | PS-INV103188 | 50000        | Relecloud     | Invoice S-INV102188 | -403.01         | SALES           | MEDIUM        |
| 3/19/2024    | 3/19/2024     | Invoice       | PS-INV103188 | 50000        | Relecloud     | Invoice S-INV102188 | 403.01          | SALES           | MEDIUM        |
| 2/28/2024    | 2/28/2024     | Invoice       | PS-INV103184 | 50000        | Relecloud     | Invoice S-INV102184 | 2,877.48        | SALES           | MEDIUM        |
| 2/21/2024    | 2/21/2024     | Payment       | PS-INV103179 | 50000        | Relecloud     | Invoice S-INV102179 | -4,999.17       | SALES           | MEDIUM        |
| 2/21/2024    | 2/21/2024     | Invoice       | PS-INV103179 | 50000        | Relecloud     | Invoice S-INV102179 | 4,999.17        | SALES           | MEDIUM        |
| 1/31/2024    | 1/31/2024     | Invoice       | PS-INV103171 | 50000        | Relecloud     | Invoice S-INV102171 | 2,877.48        | SALES           | MEDIUM        |
| 1/24/2024    | 1/24/2024     | Payment       | PS-INV103166 | 50000        | Relecloud     | Invoice S-INV102166 | -2,757.70       | SALES           | MEDIUM        |
| 1/24/2024    | 1/24/2024     | Invoice       | PS-INV103166 | 50000        | Relecloud     | Invoice S-INV102166 | 2,757.70        | SALES           | MEDIUM        |
| 1/20/2024    | 1/20/2024     | Payment       | PS-INV103162 | 50000        | Relecloud     | Invoice S-INV102162 | -403.01         | SALES           | MEDIUM        |
| 1/20/2024    | 1/20/2024     | Invoice       | PS-INV103162 | 50000        | Relecloud     | Invoice S-INV102162 | 403.01          | SALES           | MEDIUM        |

Preparing the analysis tab | Stop generating | ESC

# Chat with Copilot

## Use natural language to interact with Copilot

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

Finds business data for your company in Business Central

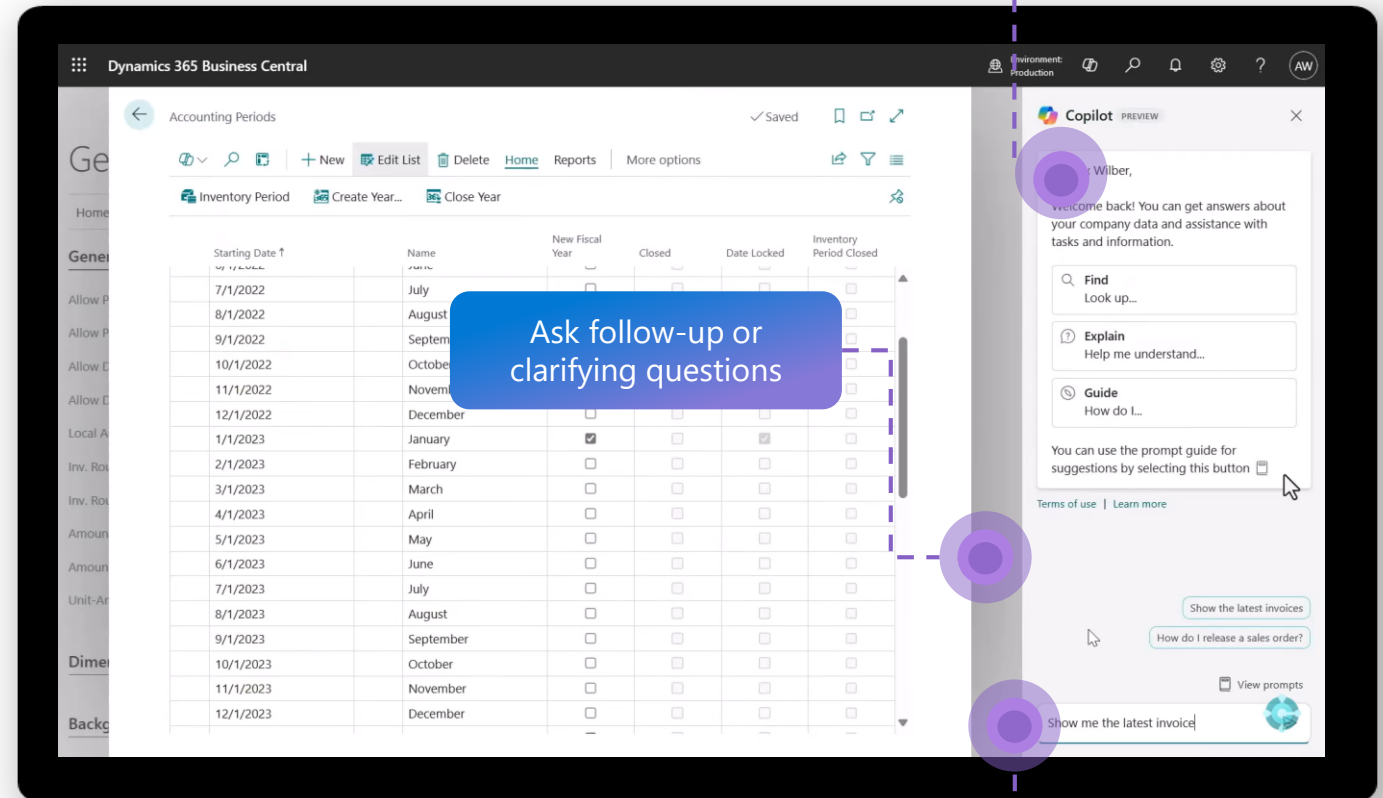
Gives explanations or step-by-step guidance on various tasks

Helps you understand the purpose and typical use of individual fields

Finds records or pages, or explains how to do things

Ask follow-up or clarifying questions

Express yourself in your own words



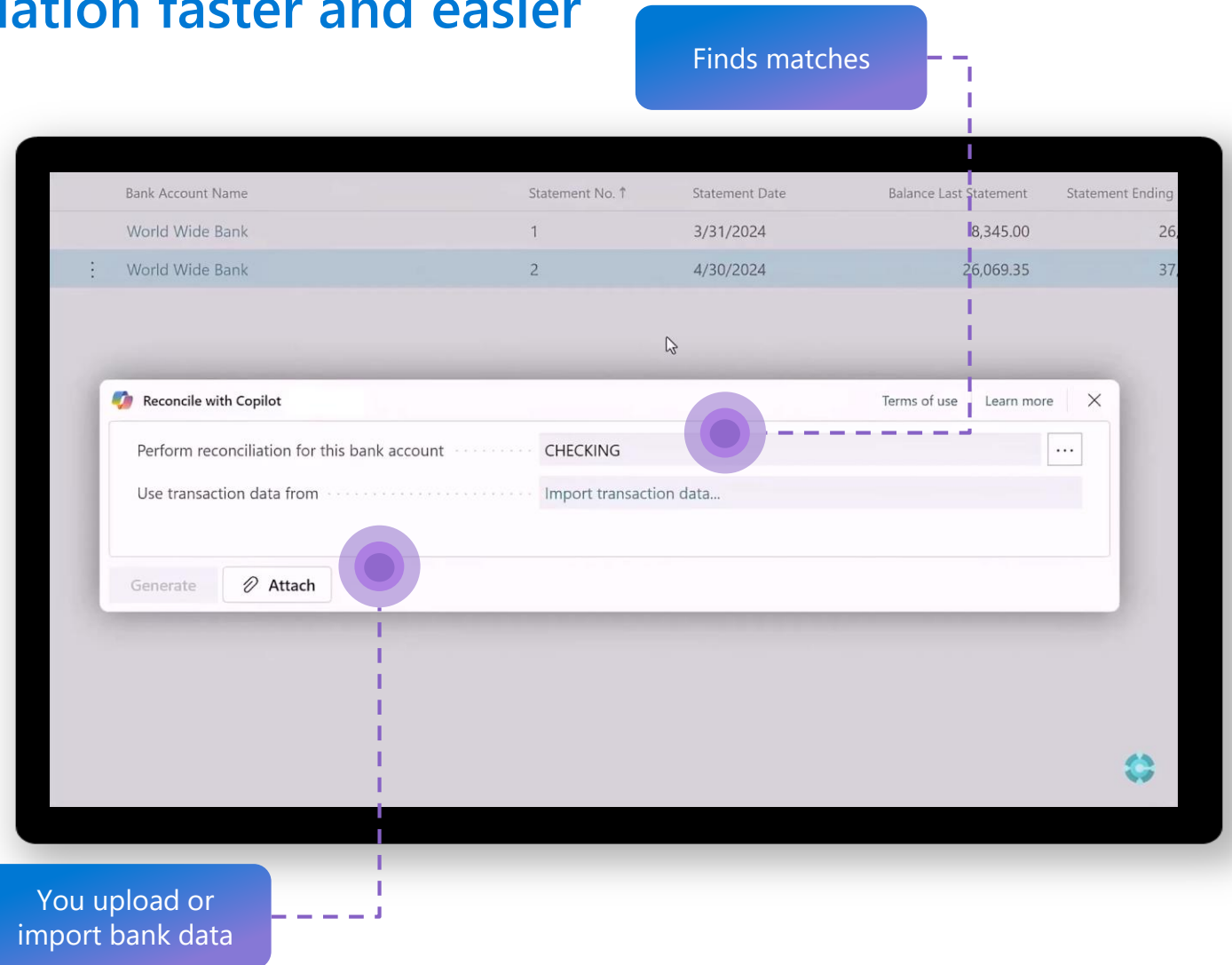
# Bank reconciliation with Copilot

Solve the puzzle of bank reconciliation faster and easier

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

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

Suggests matching ledger accounts to post new transactions to.



# Take automation further with Agents

Built for Business Central, extendable across business processes



## Sales Order Taker

In preview

## Communicates with customers

Interprets customer request

Sends quotes



## Payables Agent

In preview

Receives vendor invoices

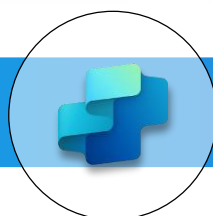
## Captures invoice information

Registers invoices according to company policy,  
preference, and history

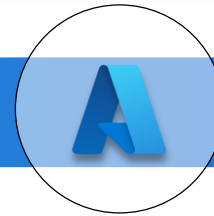
## No code



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## Pro code

## Agent builder

# Copilot Studio

## Azure AI

# Copilot beyond Business Central

## Seamless systems of record, one source of truth



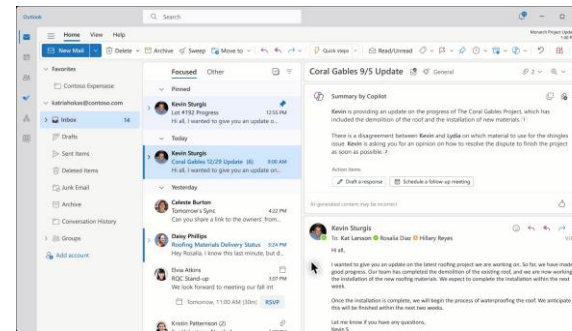
Generate a new customer profile from an inbound email



Draft a purchase order and check inventory from a call transcript

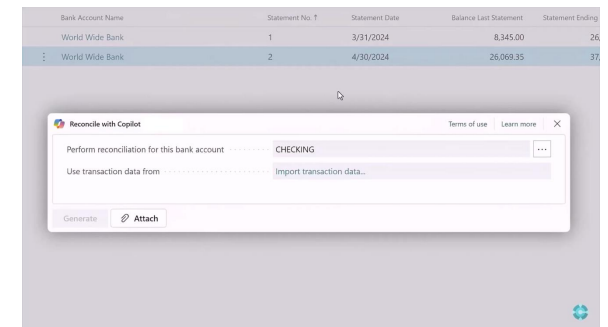
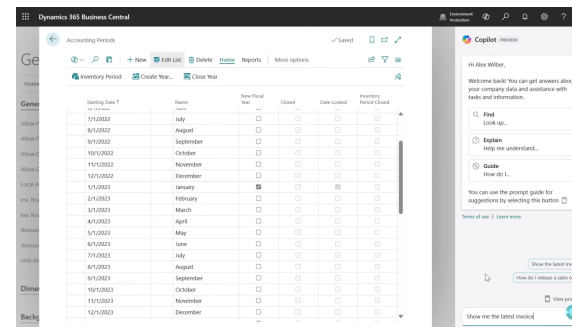


Edit any Business Central field directly in excel without middleware, and generate deep financial analysis with Copilot



The screenshot shows the Dynamics 365 Business Central interface. The main pane displays a table of Customer Ledger Entries for 'Contoso Coffee'. The table includes columns for Posting Date, Document Date, Document Type, Document No., Customer No., Customer Name, Description, Original Amount, and Customer Code. The table shows several entries, including invoices and payments, with a total of 26 entries.

| Posting Date | Document Date | Document Type | Document No. | Customer No. | Customer Name | Description         | Original Amount | Customer Code |
|--------------|---------------|---------------|--------------|--------------|---------------|---------------------|-----------------|---------------|
| 3/23/2024    | 3/23/2024     | Invoice       | PS-INV103197 | 50000        | Relecloud     | Invoice S-INV103197 | 3,081.84        | SALES MEDIUM  |
| 3/23/2024    | 3/23/2024     | Payment       | PS-INV103192 | 50000        | Relecloud     | Invoice S-INV103192 | -4,596.16       | SALES MEDIUM  |
| 3/23/2024    | 3/23/2024     | Invoice       | PS-INV103192 | 50000        | Relecloud     | Invoice S-INV103192 | 4,596.16        | SALES MEDIUM  |
| 3/19/2024    | 3/19/2024     | Payment       | PS-INV103188 | 50000        | Relecloud     | Invoice S-INV103188 | -403.01         | SALES MEDIUM  |
| 3/19/2024    | 3/19/2024     | Invoice       | PS-INV103188 | 50000        | Relecloud     | Invoice S-INV103188 | 403.01          | SALES MEDIUM  |
| 2/28/2024    | 2/28/2024     | Invoice       | PS-INV103184 | 50000        | Relecloud     | Invoice S-INV103184 | -2,877.48       | SALES MEDIUM  |
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| 2/27/2024    | 2/27/2024     | Invoice       | PS-INV103179 | 50000        | Relecloud     | Invoice S-INV103179 | 4,999.17        | SALES MEDIUM  |
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| 1/24/2024    | 1/24/2024     | Invoice       | PS-INV103166 | 50000        | Relecloud     | Invoice S-INV103166 | 2,757.70        | SALES MEDIUM  |
| 1/20/2024    | 1/20/2024     | Payment       | PS-INV103162 | 50000        | Relecloud     | Invoice S-INV103162 | -403.01         | SALES MEDIUM  |
| 1/20/2024    | 1/20/2024     | Invoice       | PS-INV103162 | 50000        | Relecloud     | Invoice S-INV103162 | 403.01          | SALES MEDIUM  |



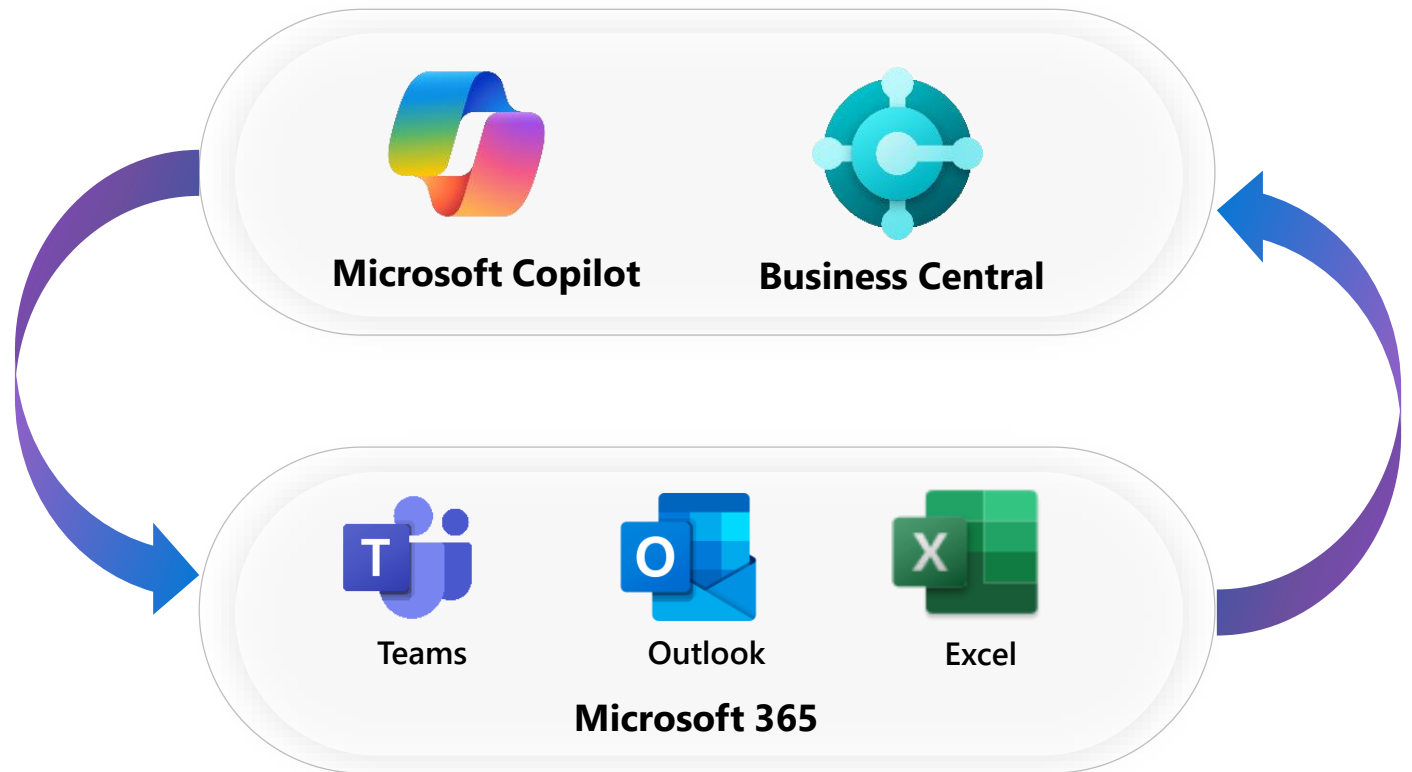
# Work smarter with Copilot in Business Central and connect it with Microsoft 365 apps

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

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

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

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



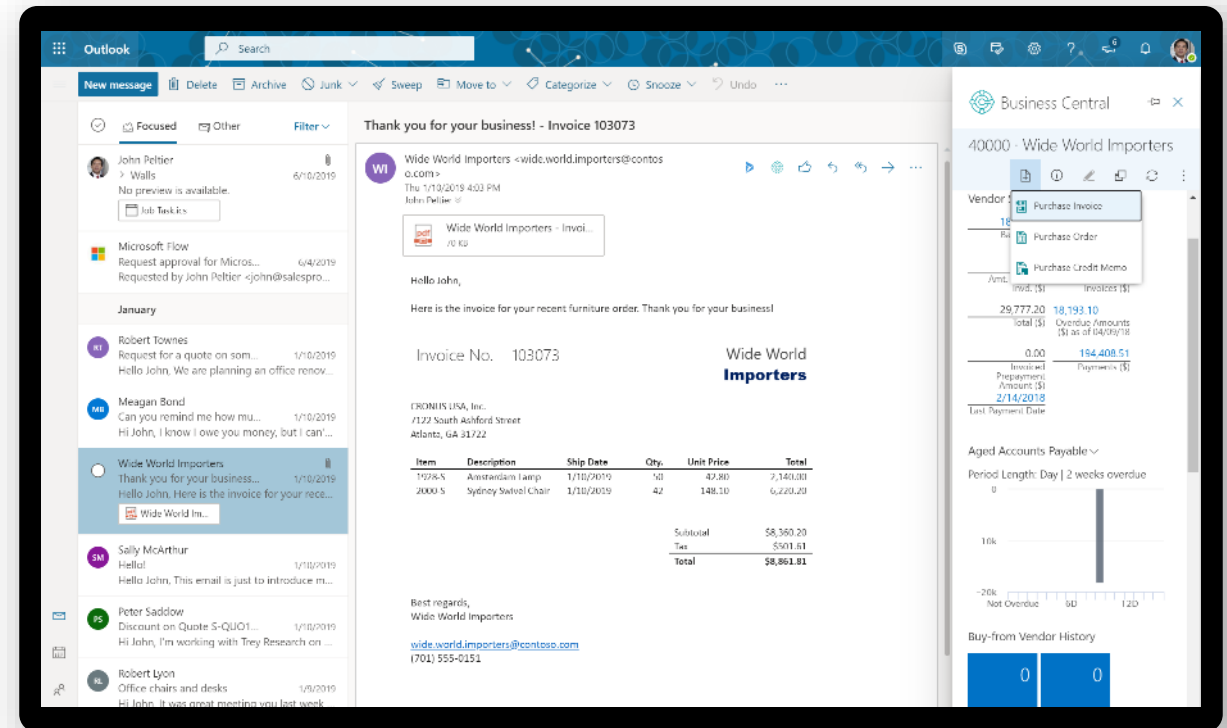
# Dynamics 365 Business Central with Outlook

Go from quote to cash within the flow of work

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

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

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



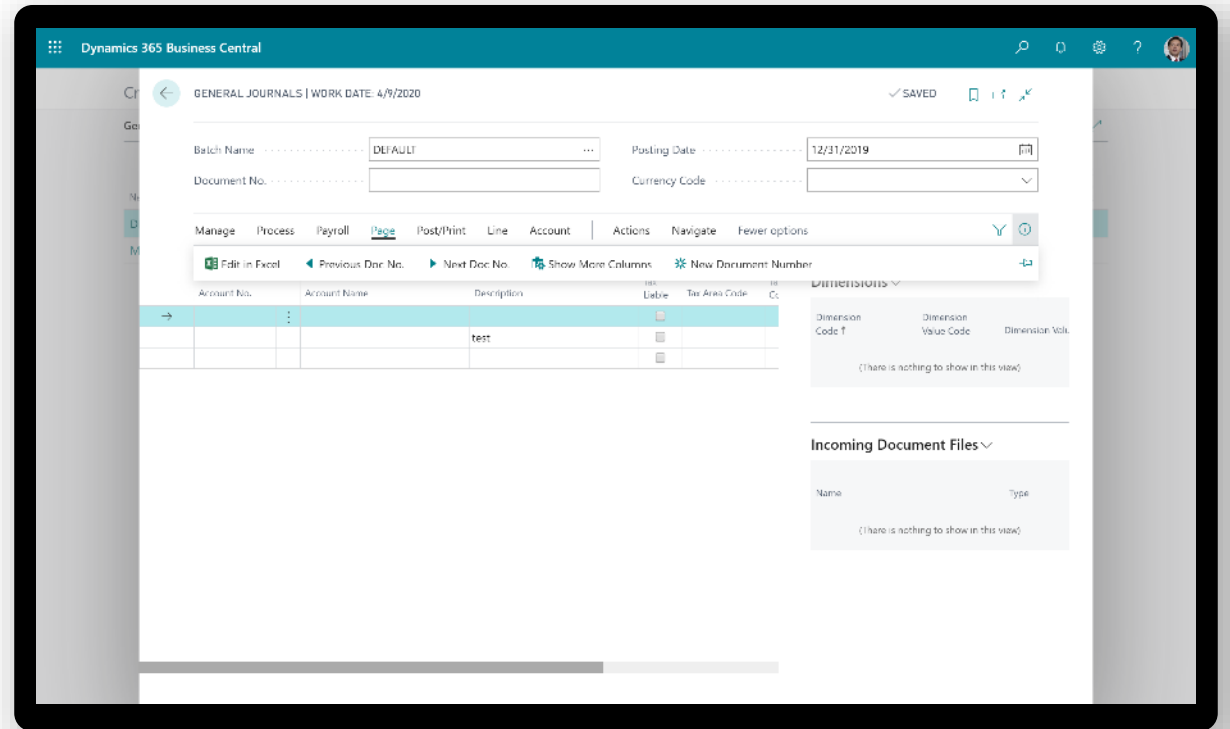
# Dynamics 365 Business Central with Excel

Simplify daily tasks to free more time for strategy

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

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

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



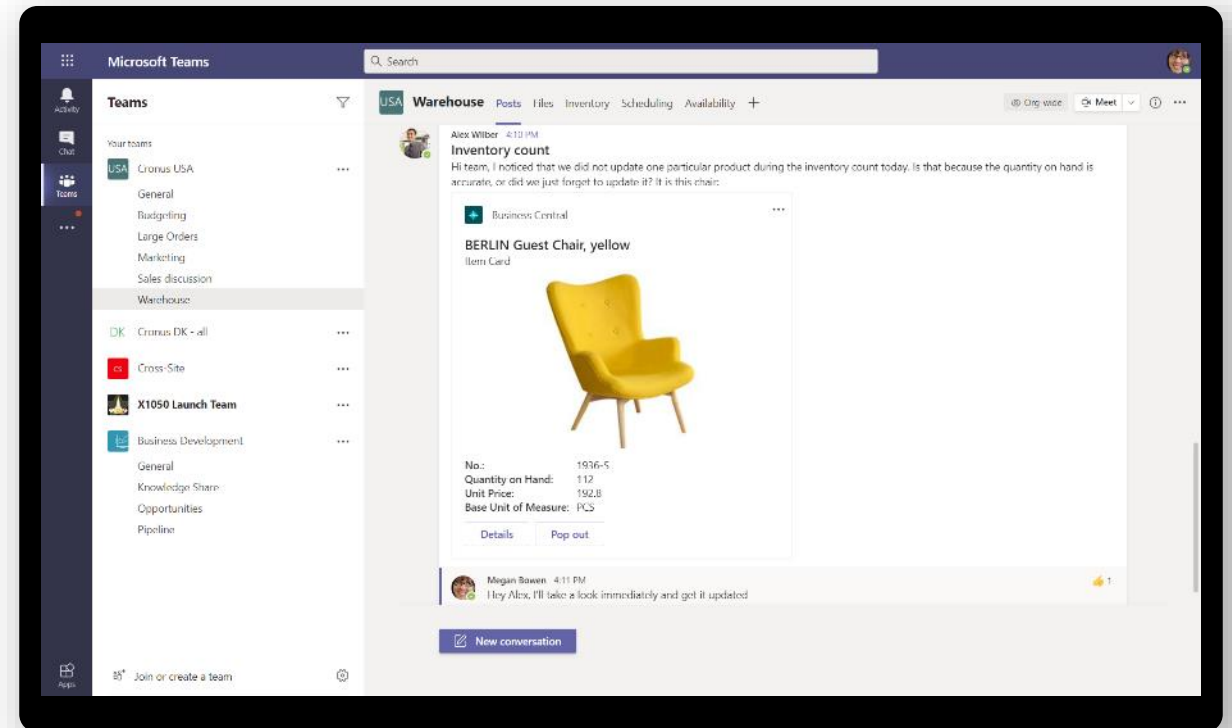
# Dynamics 365 Business Central with Teams

Quickly share details so you can act faster

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

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

Easily edit data and take action without switching apps

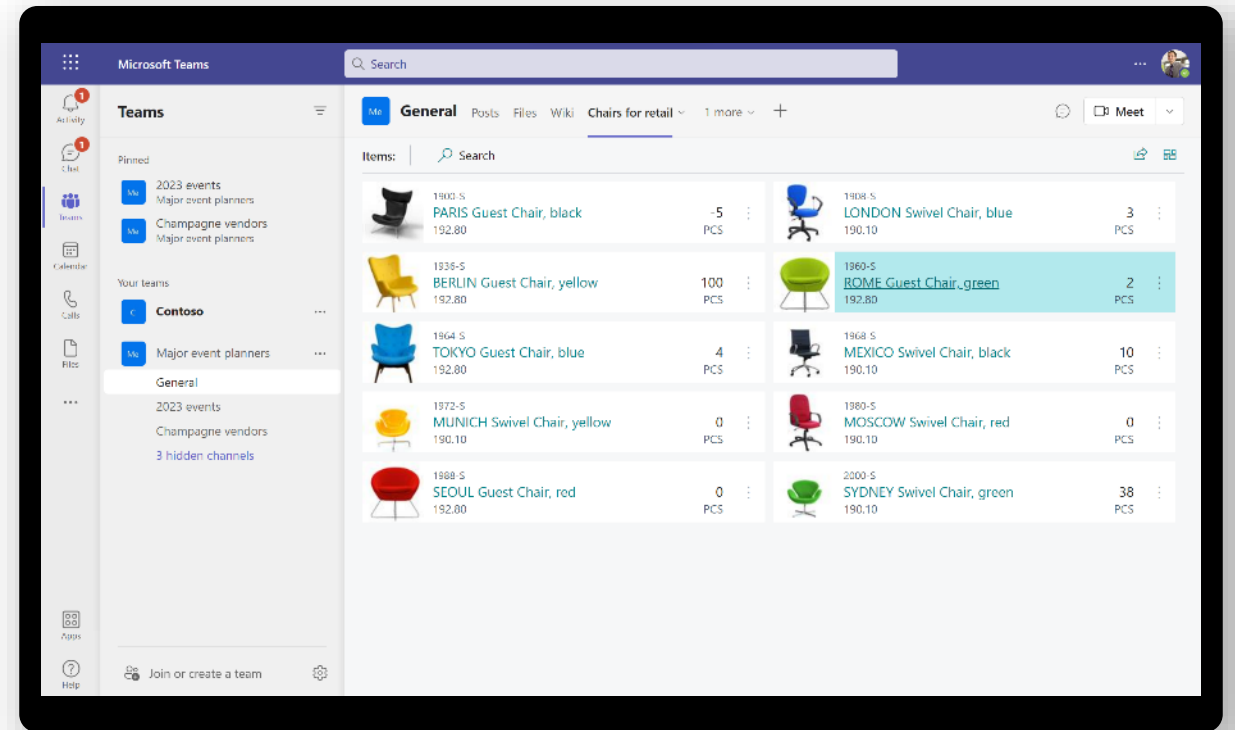


# Access Business Central data with only a Microsoft 365 license **at no additional cost\***

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

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

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



\*Applies to Microsoft 365 licenses that include Microsoft Teams



# Thank you



# Appendix

# Dynamics 365 Business Central Capabilities

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div>  <b>Finance and Accounting</b> <ul style="list-style-type: none"> <li>• General Ledger</li> <li>• Unlimited Dimensions</li> <li>• Multiple currencies</li> <li>• Multiple companies</li> </ul> </div> <div> <ul style="list-style-type: none"> <li>• Budgets</li> <li>• Financial reporting</li> <li>• Consolidation</li> <li>• Intercompany postings</li> <li>• Statistical accounts</li> </ul> </div> <div> <ul style="list-style-type: none"> <li>• Cash flow forecast </li> <li>• Fixed assets</li> <li>• Cost accounting</li> <li>• Deferrals</li> <li>• Electronic payments/direct debits</li> </ul> </div> <div> <ul style="list-style-type: none"> <li>• Customer payment process</li> <li>• Late payment prediction </li> <li>• Bank account reconciliation </li> <li>• Bank account management</li> <li>• Check writing</li> </ul> </div> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <div>  <b>Sales and marketing</b> <ul style="list-style-type: none"> <li>• Marketing text suggestions </li> <li>• Contact management</li> <li>• Campaign management</li> <li>• Interaction and email logging</li> <li>• Opportunity management</li> <li>• Dynamics 365 Sales integration</li> </ul> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <div>  <b>Fulfillment and delivery</b> <ul style="list-style-type: none"> <li>• Sales invoicing </li> <li>• Sales order management</li> <li>• Sales line and invoice discounting</li> <li>• Campaign pricing</li> <li>• Returns and exchanges</li> <li>• Dynamics 365 Customer Service integration</li> </ul> </div> | <div>  <b>Purchasing and payables</b> <ul style="list-style-type: none"> <li>• Purchase invoicing</li> <li>• Purchase order management </li> <li>• Purchase return order management</li> <li>• Alternative order addresses</li> <li>• Purchase invoice discounts</li> </ul> </div> |
| <div>  <b>Inventory</b> <ul style="list-style-type: none"> <li>• Inventory control</li> <li>• Item categories and attributes</li> <li>• Item tracking</li> <li>• Multiple locations</li> <li>• Location transfers</li> </ul> </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <div>  <b>Supply planning and availability</b> <ul style="list-style-type: none"> <li>• Supply planning</li> <li>• Demand forecasting</li> <li>• Sales and inventory forecasting </li> <li>• Order promising</li> <li>• Calendars</li> </ul> </div>                                                                  | <div>  <b>Project management</b> <ul style="list-style-type: none"> <li>• Basic resources</li> <li>• Capacity management</li> <li>• Multiple costs</li> <li>• Projects</li> <li>• Time sheets</li> </ul> </div>                                                                                                                                                       |
| <div>  </div>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <div>  <b>Warehouse management</b> <ul style="list-style-type: none"> <li>• Bin Tracking</li> <li>• Inventory picks and put-aways</li> <li>• Warehouse receipt</li> <li>• Warehouse shipment</li> </ul> </div>                                                                                                                                                                                        | <div>  </div>                                                                                                                                                                                                                                                                                                                                                       |

# Business operations priorities by role



Increase revenue and profitability



Innovation and competitive advantage



Employee culture and engagement



Financial health



Timely, accurate financial data



Aligning business strategy and investment



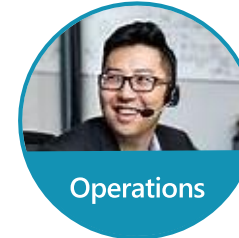
Efficiency and effectiveness of sales team



Actionable revenue and pipeline insights



Stronger seller and buyer relationships



Efficient operations



Flexible systems and processes



Business insights driven by data



Ability to leverage technology



IT cost-effectiveness



IT compliance and business security