



MICROSOFT VIRTUAL EVENTS • POWERED
BY TEAMS

Dynamics 365 Business Central

2026 Release Wave 1

*What's coming, what matters, and how it will help you
to move forward*

Jennifer Bonenfant, CPA

ERP Practice Lead • Boyer & Associates

boyerassoc.com

Empower your data

About Boyer

Your Microsoft partner for Business Central and beyond

1

Microsoft Solutions Partner

30+ years of experience with Microsoft ERP — deep Business Central expertise.

2

End-to-end services and support

Assessments, implementations and migrations, integrations and dedicated Client Care for the long haul.

3

Managed Services for all your Microsoft solutions

Proactively improve your Dynamics, Power Platform, and Microsoft 365 solutions.

4

AI-first firm

Helping you take the next step on your AI journey with practical, Copilot-ready solutions.



Empower your business with Microsoft.

A quick word about your speaker.



CPA with 25+ years of experience · Known Microsoft speaker & trusted advisor

A 360° view of ERP — from audit, financial management, consulting, and product management.

Jennifer Bonenfant, CPA

ERP Practice Lead, Boyer

Today's roadmap

2026 Release Wave 1 – Advancing Business Central's vision as an intelligent, scalable, and easy-to-use solution

01

The big picture

Why Microsoft is calling BC an "AI-driven ERP" — and what that means at month-end.

02

Copilot & Agents

Where Copilot ends and autonomous agents begin. Plus a deep look at the new Expense Agent.

03

Reporting & Data

A genuinely better report experience — tiles, lifecycle, scheduling, and audit.

04

Operations

Financial management, supply chain highlights, and M365 productivity.

05

Resources & Q&A

Where to read more, and how to get hands-on with your own data.

The Big Picture: BC 2026 Release Wave 1 (v28.0 & later)

50+

New Features
& Updates

11

Investment
Areas

Apr–Sep

2026 Rollout
Window

Microsoft Investment Areas

- Copilot & Agents
- Financial Management
- Reporting & Analysis
- Supply Chain Management
- Development
- Governance & Administration
- Productive with Microsoft 365
- Sustainability Management
- Service & Platform



Copilot & Agents



"Business Central increasingly acts as an active partner in daily work — helping you analyze data, take action, and make decisions with greater confidence and efficiency."

From manual tasks to autonomous, insight-driven operations

EMBEDDED AI

Copilot and agents inside the work, not bolted on.

GUIDED CONTROL

Humans approve, review, and stop — not just monitor.

INSIGHT-FIRST

Reporting modernized to surface what matters first.

Copilot vs. Agents — what's the difference?

Two related tools. Different jobs. Same license.

MICROSOFT COPILOT

Your AI assistant

You stay in the driver's seat. Copilot guides, finds, compares, and summarizes — on demand.

- Chat with your data and pages
- Bank account reconciliation assist
- Item & sales line suggestions
- Marketing text generation
- Works the moment you turn it on — no setup

AUTONOMOUS AGENTS

Your AI coworker

Runs end-to-end work in the background, then hands it to a human for approval.

- Payables Agent — reads invoices, matches vendors, preps for approval
- Sales Order Agent — captures orders from email
- Expense Agent (NEW) — turns receipts into approved expense reports
- Always runs with human oversight
- Available to online customers

Your agent lineup for Wave 1

Four ways autonomous agents show up in Business Central.

GA

Payables Agent

Reads inbound invoices, matches vendors and accounts, and stages them for approval. Wave 1 adds inbox visibility — see exactly what the agent processed.

Best for: AP teams

GA

Sales Order Agent

Captures orders from email conversations and turns them into draft sales documents — review and post.

Best for: Order desk

NEW

Expense Agent

Today's spotlight. Reads receipts, categorizes spend, builds expense reports, and routes for approval.

Best for: Employees + AP

PREVIEW

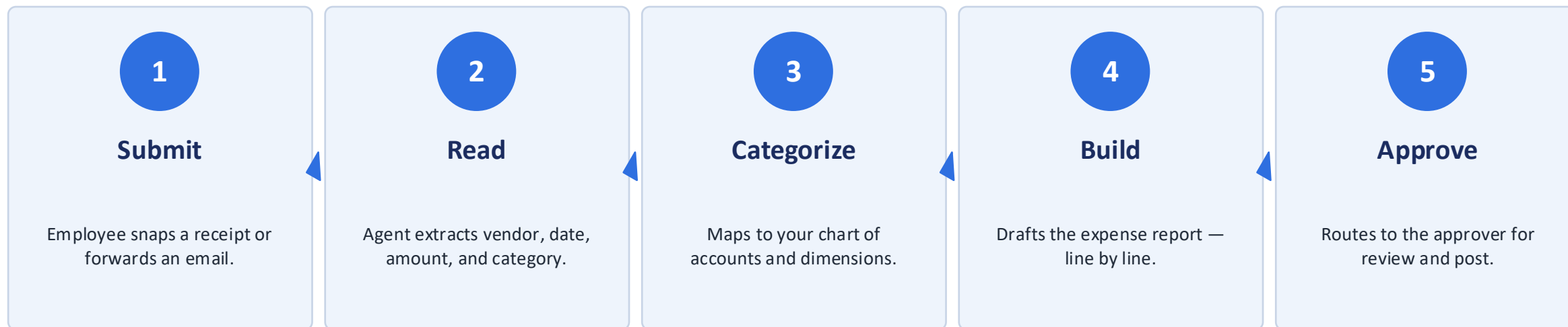
Build Your Own

Design custom agents with natural-language instructions using the in-product Agent Designer and the new MCP server.

Best for: Consultants + makers

Expense Agent

Public preview: May 8, 2026 • Manage employee expenses in Business Central, with AI doing the busywork.



WHY ACCOUNTANTS CARE

Expense reports are one of the highest-volume, lowest-value tasks in finance. Letting the agent do first-pass coding and validation means your team focuses on policy exceptions, not data entry — and you get cleaner coding to dimensions on the first try.



Boyer tip: Pilot Expense Agent with a single department before opening it to the company. Review the first 50 reports together with the agent to validate dimension coding.

Payables Agent — better visibility in Wave 1

It's been here. What's new is knowing what it's already done.

WHAT'S NEW

Discover emails in the mailbox that have been processed

Now you can see exactly which inbound emails the Payables Agent has already touched — eliminating duplicate processing and giving AP managers a clear audit trail.

GA Apr 1, 2026

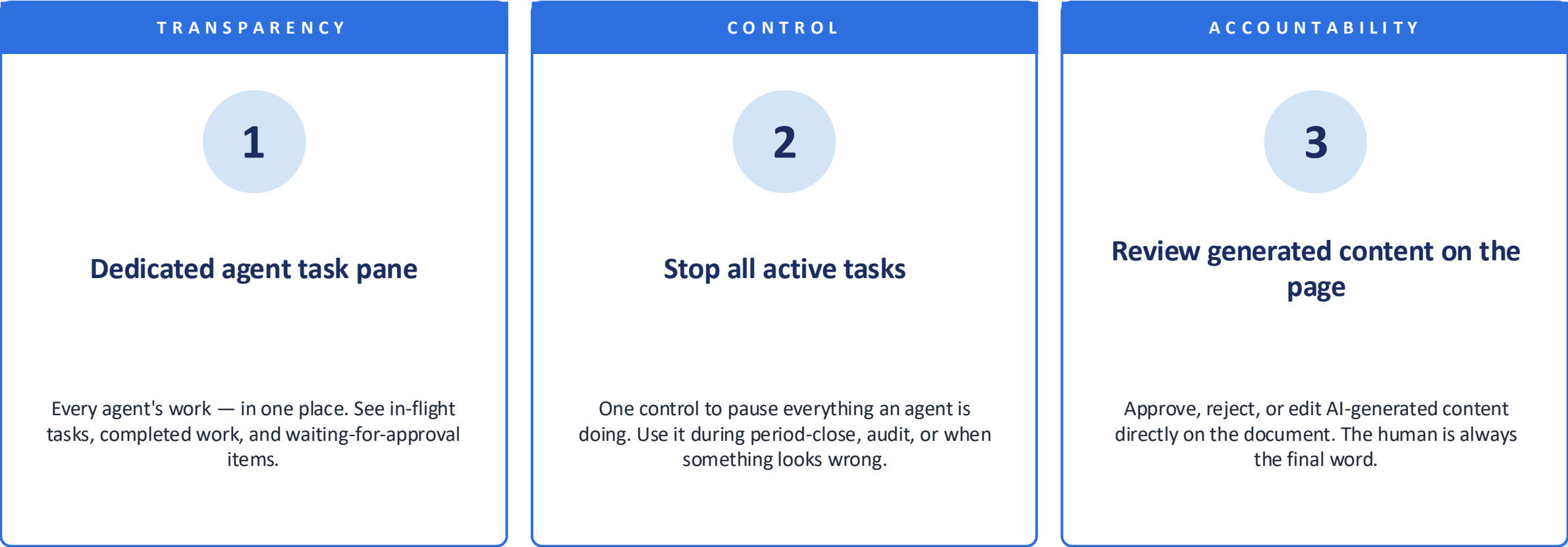
Available automatically to all users.

How the Payables Agent works

- 1 Reads invoices**
From email or shared inbox — PDFs, structured XML, or pictures.
- 2 Matches vendors**
Identifies the vendor record and proposes the right G/L coding.
- 3 Stages for approval**
Prepares the invoice; a human approves before posting.
- 4 Now: shows you what it touched**
New mailbox visibility means no more 'did the agent get this one?'

Governing your agents

A control environment is not compromised by the use of agents. Wave 1 continues to add control.



Translation: your internal controls don't disappear when an agent shows up. They get a new place to live.

Source: Microsoft Learn — Govern AI agents in BC (task pane, stop tasks, review content).

Build your own agents

Public preview — and yes, accountants can drive this conversation.

AGENT DESIGNER

Design agents the way you write a memo.

Natural-language instructions. Test against real data in a sandbox. Refine and iterate. Domain experts and consultants — not just developers — can prototype agents.

- Low-risk sandbox environment
- Tested against your data
- AI Development Toolkit included

MCP SERVER + COPILOT STUDIO

Reach beyond Business Central.

The new BC MCP server exposes BC tools to agents in Microsoft 365 and Copilot Studio. Build agents that span Outlook, Teams, and Business Central in one workflow.

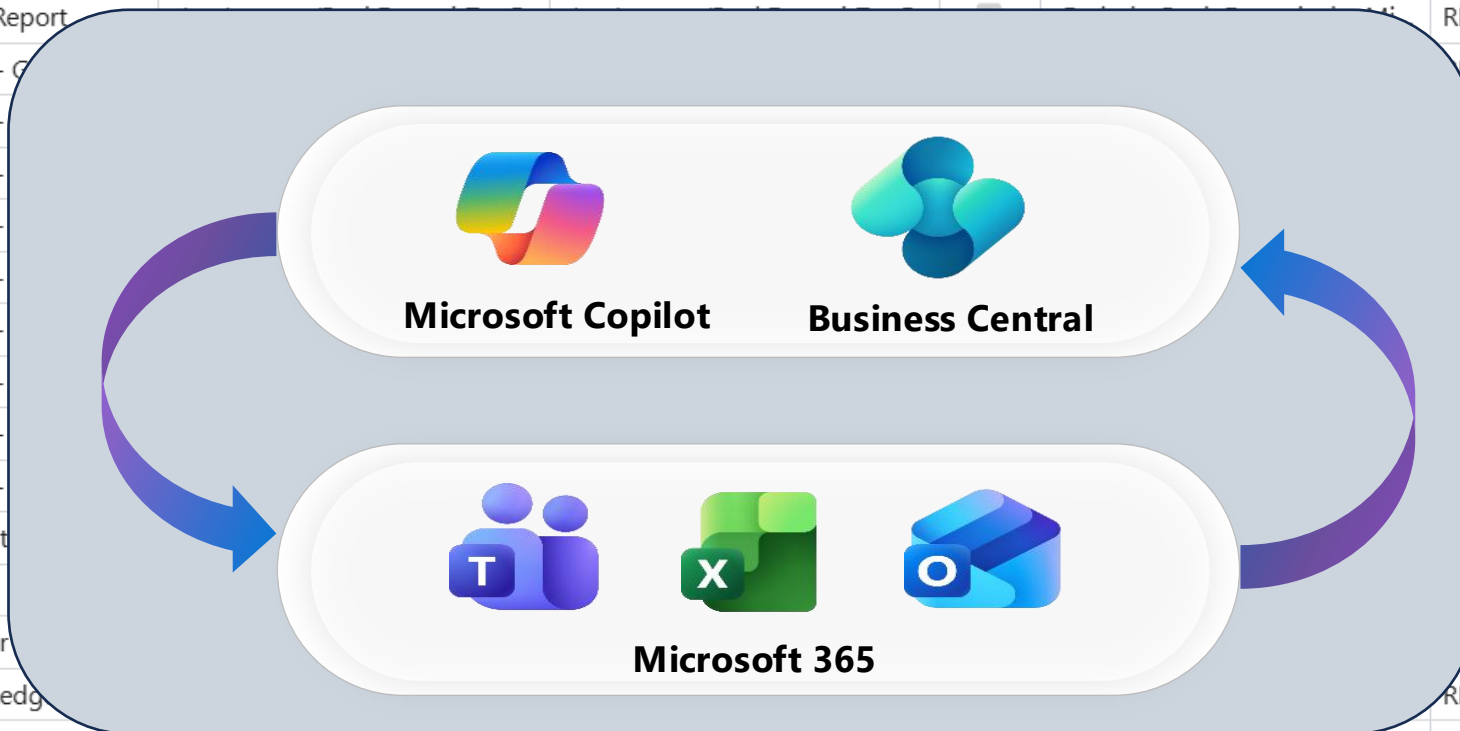
- Connect agents to BC admin center
- Surface custom agents as MCP tools
- Use Copilot Studio for orchestration
- Troubleshooting MCP server (May 2026)

Report Layouts: All ▾ |  ▾ |  |  | Manage  New  Edit info  Run report  Export layout  Replace layout Layout | More options 

Microsoft 365

Keeping you in the flow of work

1409	Posted Payment Reconciliation	./Bank/Reports/PostedPaymen...	./Bank/Reports/PostedPaymen...	☒	Base Application by Microsoft	RDLC	☐	Default	
1690	Bank Deposit	./src/reports/BankDeposit.rdlc	./src/reports/BankDeposit.rdlc	☒	_Exclude_Bank Deposits by Mi...	RDLC	☐	Default	
1691	Bank Deposit Test Report			☐		RDLC	☐	Default	
1700	Deferral Summary - G			☐		DLC	☒	Default	
1700	Deferral Summary -			☐		ord	☐	Default	
1700	Deferral Summary -			☐		cel	☐	Default	
1701	Deferral Summary -			☐		LC	☒	Default	
1701	Deferral Summary -			☐		ord	☐	Default	
1701	Deferral Summary -			☐		cel	☐	Default	
1702	Deferral Summary -			☐		LC	☒	Default	
1702	Deferral Summary -			☐		ord	☐	Default	
1702	Deferral Summary -			☐		cel	☐	Default	
1826	Consolidation - Test			☐		LC	☐	Default	
2500	Day Book Tax Entry			☐		LC	☐	Default	
2501	Day Book Customer			☐		LC	☐	Default	
2502	Day Book Vendor Ledg			☐		RDLC	☐	Default	
4402	Aged Accounts Receivable (Exc...	Aged Accounts Receivable Excel	Built in layout for Aged Accou...	☒	Dynamics BC Excel Reports by ...	Excel	☐	Default	
4403	Aged Accounts Payable (Excel)	Aged Accounts Payable Excel	Built in layout for Aged Accou...	☒	Dynamics BC Excel Reports by ...	Excel	☐	Default	



Where you already work

Investments across Microsoft 365 add value, reduce friction, and create a seamless Business Central experience in the tools users already know.

Outlook	Improved email-connected quoting, invoicing, and follow-up keep users in the flow of work.
Excel	Live list analysis and write-back make familiar spreadsheet workflows faster and easier.
Sharepoint	Embedded connections align familiar tools with Business Central so users can work without
Onedrive	Viewing, sharing, and co-authoring business documents stays seamless in the browser.
Teams	Share insights, analysis and details with your team
Word	Deeper document and template integration cuts handoffs and speeds creation.

Quick win — Advanced Tell Me

Use Natural Language to get where you want to go

Type what you need.

Find the page.

Get the report.

Tell Me has been quietly upgraded. Natural-language search across pages, reports, actions, and admin tasks — with smarter ranking and richer suggestions. It's already there. Most teams have never enabled it.

Action: Feature Management → Find pages and reports with advanced Tell Me search.

Vendor — Aged Accounts Payable

Report

Vendor — Trial Balance

Report

Payables Setup

Page

Set up dimensions on vendors

Action

Reporting Enhancements, 2026 Wave 1

New tile view

Categories

Lifecycle status

Company-specific defaults

Dimension perspectives

Scheduling

Audit log



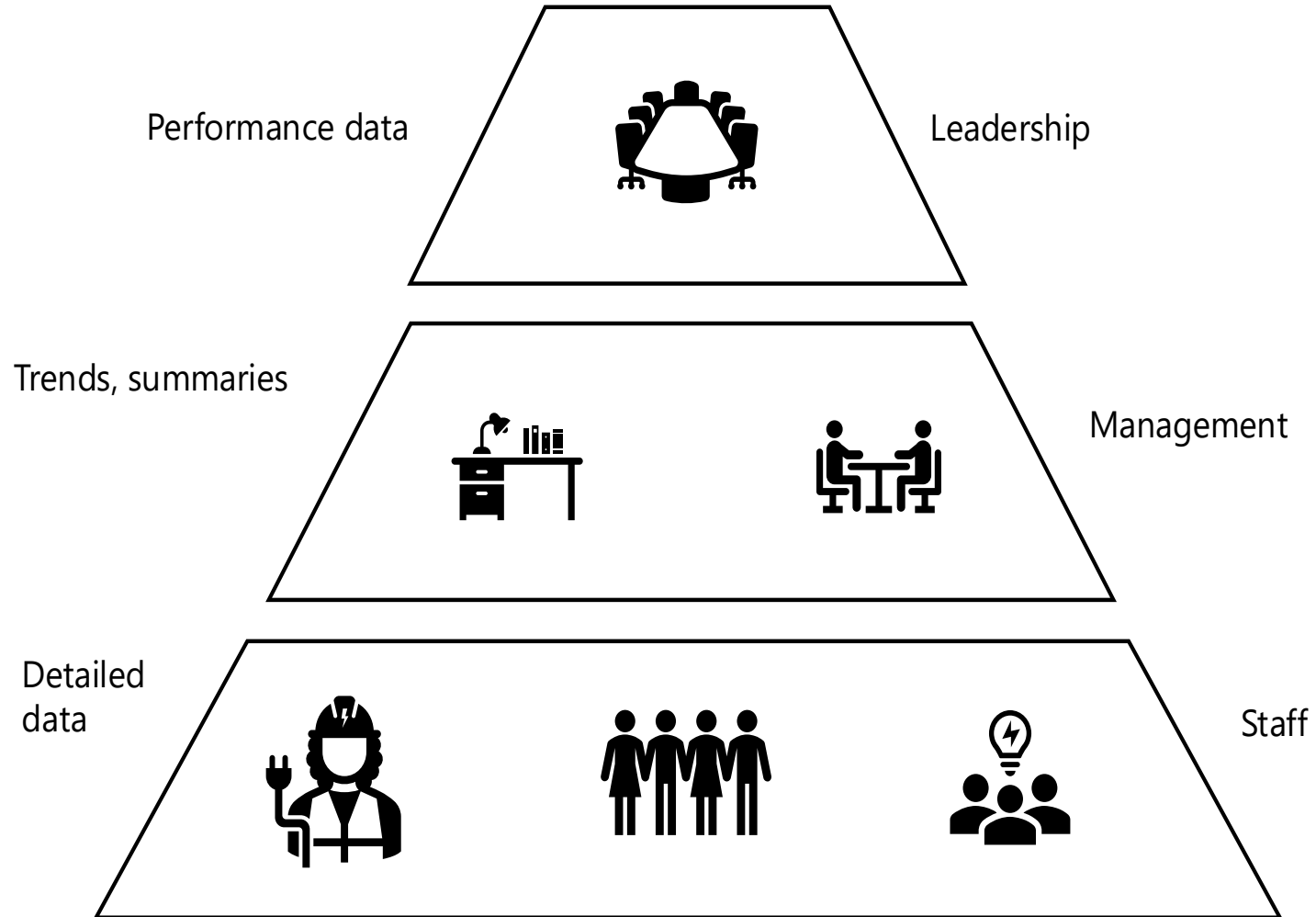
Analytics, business intelligence & reporting

PowerBI

Financial Reports

Analysis Mode
Cues & Views
Standard Reports

Data aggregation



Organizational hierarchy



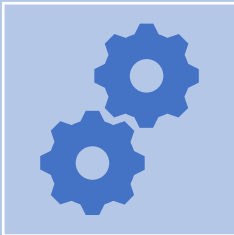
Resource: <https://aka.ms/bcreporting>

Account Categories overview ACC-CAT27/02/2026 19:51 Organizes balance sheet and income statement categories into structured rows with calculated totals like net income, combined with columns showing net...	Capital Structure ANALYSIS Analyzes liquidity and short-term obligations with a row layout grouping current assets, receivables, inventory, WIP, and short-term liabilities, calculating totals and n...	BALANCE SHEET Balance Sheet BS ACTIVE 27/02/2026 19:57 Presents a complete balance sheet structure with grouped sections for assets, liabilities, and equity, including formulas for totals like total assets and total...	Balance Sheet Audit Lead S BS AUDIT Provides an audit-focused balance sheet layout with detailed rows for cash, receivables, inventory, prepaid expenses, fixed assets, liabilities, and equity, including...
Balance Sheet Detailed BS DET Provides a detailed balance sheet layout with exp sections for current and long-term assets, liabilities equity, including granular account ranges and...	Balance Sheet Summarized	Calculation Of Cash Flow	ESG
Data for Cash Cycle Chart I_CACycle27/02/2026 Calculates key cash cycle metrics, including revenue, receivables, payables, and inventory balances, with formulas for DSO, DPO, DSI, and overall cycle in...	Summarizes cash flow components, including receivables, payables, and liquid funds, with a formula to calculate total cash flow using balance at date for	Analyzes income and expense components, including revenue, goods sold, external costs, personnel costs, depreciation, and other expenses, with formulas for...	Summary for Reduced Trial Balance Info Part TRIAL Summarizes nine key trial balance metrics in a structured layout, covering revenue, cost, operating exp... expenses, with formulas for gross...
Income Statement IS Structures a compreh statement, detailing expenses, and calcul	Income Statement Audit Lead Sched IS AUDIT Provides an audit-focused income state with granular breakdowns, covering rev cost of goods, and operating expenses	Income Statement Detailed ed multi-section income statement revenue categories, cost of goods, and ses with account ranges for materials,...	Income Statement Summarized Income statement components, and operating margin, margin...
BALANCE SHEET Balance Sheet M-BALANCE Presents a balance sheet layout based on account categories, covering current and fixed assets, liabilities, and equity. Includes subrows for cash, receivables,...	CASHFLOW Cash Flow Statement M-CASHFLOW Structures a cash flow statement with operating, investing, and financing sections, including detailed groupings and formulas for net cash flows. Reconciles...	Income Statement DRAFT Displays a simple income statement layout structured into income, cost of goods sold, and expenses, with formulas for gross profit and net income to deliver cle...	Income Statement DRAFT Tracks retained earnings across periods with a seven-row layout, using formulas to combine beginning balance, net income, and shareholder distributions for...

Financial Reports



BETTER OVERVIEW



FASTER SETUP



BOOSTED PRODUCTIVITY

Faster setup, smarter workflows

Define properties once. Use them everywhere. Schedule the work, not the people.

Company-specific defaults

GA Apr 1, 2026

Set printer, language, layout, and recipient defaults at the company level. Stop re-configuring on every run.

Dimension perspectives

GA Apr 1, 2026

Run the same report across different dimension sets — global vs. operational vs. statutory — without rebuilding it.

Scheduling

GA Apr 1, 2026

Set reports to run nightly, weekly, or month-end. They land in inboxes ready for review.

Set default document language

GA Apr 1, 2026

Localize at the company level so invoices and statements speak the recipient's language by default.

Name BS

Display Title Balance Sheet

Category

Row Definition

Column Definition

Dimension Perspective DEPARTMENT

Show currency

Negative Default

Dimensions

Department Filter

Customergroup Filter

Description

Retained Earnings

Current Year Earnings

Total Equity**Total Liabilities and Equity**

→ Check Figure

Run Financial Report

Printer (Handled by the browser)

Report Layout Financial Report Landscape

Financial Report BS

Row Definition BS

Column Definition BAL ONLY

Dimension Perspective DEPARTMENT

Dimension Perspective

Specifies the name (code) of the dimension perspective to be used for the report (default is the one used in the report definition, but you can override this here).

Ending Date 01/06/2027

G/L Budget

Cost Budget Filter

Show

Show Error None

Show Amounts in Add. Reportin...

Show Row No.

Print Alternating Shading

Skip Zero Balance Lines

Send to...

Print

Preview & Close

Cancel

ns where you can specify what to include in the PDF/print-out.

Default

01/06/27

ACTIVE

Presents a complete balance sheet structure with grouped sections for assets, liabilities, and equity, including formulas for totals like total assets and total liabilities. Shows data with a single-column balance snapshot as of a specific date for accurate figures. Useful

28/02/2026 09:35

Show more

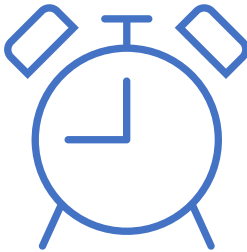
Balance

-2,193,815.38

-2,193,815.38**-2,311,118.79**

Name	Display Title	Category	Row Definition	Row Analysis View Name	Column Analysis View Name	Dimension Perspective	Perspective Analysis View Name	Status
ACC-CAT	Account Categories overview	ACC-CAT						
ANALYSIS	Capital Structure	ANALYSIS						
BS	Balance Sheet	BS						
BS AUDIT	Balance Sheet Audit Lead Sche...	BS AUDIT						
BS DET	Balance Sheet Detailed	BS DET						
BS SUM	Balance Sheet Summarized	BS SUM						
CASHFLOW	Calculation Of Cash Flow	CASHFLOW						
ESG	ESG	ESG						
L_CACYLE	Data for Cash Cycle Chart	L_CACYLE		PERIODS				
L_CASHFLOW	Data for Cash Flow Chart	L_CASHFLOW		PERIODS				
L_INCEXP	Data for Income & Expense Ch...	L_INCEXP		PERIODS				
L_MINTRIAL	Data for Reduced Trial Balance ...	L_MINTRIAL		PERIODS				
IS	Income Statement	IS		M-NETCHANG				
IS AUDIT	Income Statement Audit Lead ...	IS AUDIT		PTD + YTD				
IS DET	Income Statement Detailed	IS DET		ISTREND				
IS SUM	Income Statement Summarized	IS SUM		ISTREND				
M-BALANCE	Balance Sheet	BALANCE SH...	M-BALANCE	M-BALANCE				DRAFT
M-CASHFLOW	Cash Flow Statement	CASHFLOW	M-CASHFLOW	M-NETCHANG				DRAFT
M-INCOME	Income Statement	PROFITABILITY	M-INCOME	M-NETCHANG				DRAFT

Schedule Reports



Code	Description	Export to Excel	Excel Template Code	Export to PDF	Send Email	No. of Recipients	Next Run Date/Time	Recurrence Run Date Formula	Custom Filters	Start Date Filter Formula	End Date Filter Formula
DAILY	Daily report					0	5/20/2026 12:00 AM	1D			

User ID	Date and...	Table Caption	Field Caption	Primary Key Fiel...	Primary Key Fiel...	Typ...	Old Value	New Value	
ADMIN (92)									
	2/21/23, 10:...	User	Contact Email			Modifi...	transformprov@microsoft...	admin@M365x44989319...	
	2/21/23, 10:...	User Plan	Plan ID			Insertion		{62E90394-69F5-4237-91...	
	2/21/23, 10:...	User Plan	User Security ID			Insertion		{3C0F1E61-F0DE-4BFA-9...	
	2/21/23, 10:...	Access Control	User Security ID			Insertion		{3C0F1E61-F0DE-4BFA-9...	
	2/21/23, 10:...	Access Control	Role ID			Insertion		AUTOMATE - EXEC	
	2/21/23, 10:...	Access Control	Company Name			Insertion		CRONUS USA, Inc.	
		Scope							
		App ID							
		User Security ID							
	2/21/23, 10:...	Access Control	Role ID						
	2/21/23, 10:...	Access Control	Company Name						
	2/21/23, 10:...	Access Control	Scope						
	2/21/23, 10:...	Access Control	App ID						
	2/21/23, 10:...	Access Control	User Security ID						
	2/21/23, 10:...	Access Control	Role ID						

 Create new analysis

Rename

Duplicate

Add columns from

Copy link

Open in Excel

Arrange

Delete

Delete all

G/L Entry

Bank Account

Bank Account

Currency

Customer

Customer

Dimension V...

Dimension V...

Employee

Employee

Current source

Via: Bal. Account No. = No.

Via: Source No. = No.

Via: Source Currency Code = Code

Via: Bal. Account No. = No.

Via: Source No. = No.

Via: Global Dimension 1 Code = Code

Via: Global Dimension 2 Code = Code

Via: Bal. Account No. = No.

Via: Source No. = No.

Pivot Mode

Search...

Date and Time

User ID

Table Caption

Field Caption

Primary Key Field 1 Value

Primary Key Field 2 Value

Primary Key Field 3 Value

Type of Change

Old Value

Old Value (Local)

New Value

New Value (Local)

Row Groups

User ID

Values

Drag here to aggregate

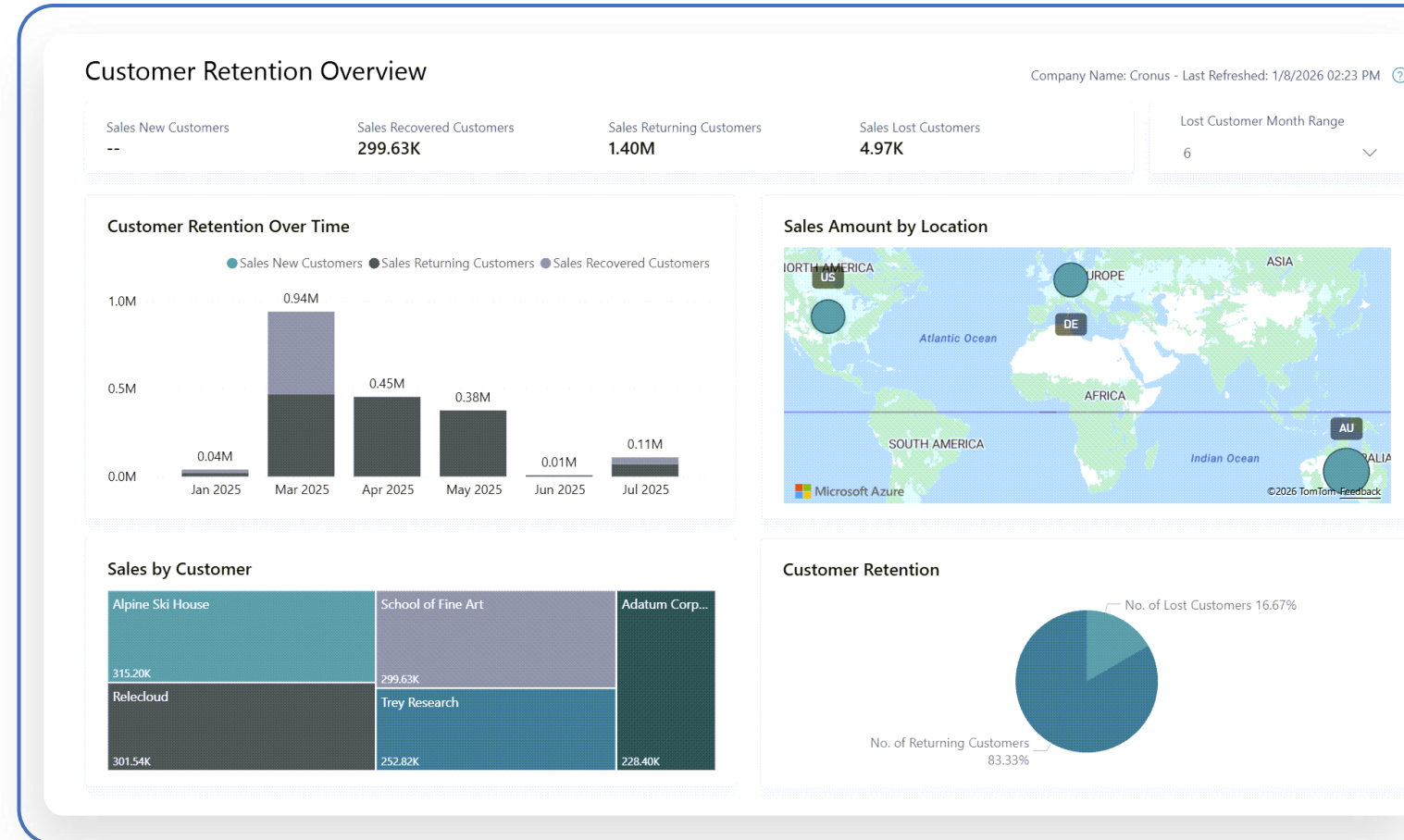
Analysis Mode

Updated Power BI apps for subscription billing, sales, and inventory

Sales: Customer loyalty

Inventory: ABC Analysis

Subscription Billing: Completely
reworked all Power BI reports



Audit, documents, and analysis everywhere

Reporting that holds up to an auditor — and works in the tools your team already uses.

AUDIT

Audit log & audit reporting

Track who ran what, when, and with which parameters. New APIs for analyzing approval workflows and permissions — built for auditors and IT.

DOCUMENTS

Enhanced Word & Excel document layouts

Get easier editing of document report layouts with the enhanced Word add-in. Control the lifecycle of report layouts so you know what's in production.

ANALYSIS

More places for Analysis view

Slice and pivot data in more list pages. Save and share analysis views without exporting. Enhanced deferrals and trial balance reports run faster.

Financial management

Tax, fixed assets, vendor self-billing — close-cycle relevant.

Self-billed invoices

Use vendor self-billing for streamlined intercompany or service-provider scenarios.

Preview Apr 2026 • GA Jun 2026

Excise & withholding taxes

Calculate excise taxes and vendor withholding taxes with built-in framework.

GA May–Jun 2026

Plastic & sugar tax

Apply environmental and consumption taxes by item — useful for global trade.

GA Jul 2026

Accelerated depreciation

New methods for fixed assets including Investment Boost.

GA May–Sep 2026

Employee expense reports

Pair with the new Expense Agent. Full reporting and approval flow.

Preview May 2026 • GA Oct 2026

Subscription billing — recurring

Cut time spent on recurring invoicing for subscription-style revenue.

GA Apr 1, 2026

Smart Automation:

Create Purchase Invoices Directly from .PDF files

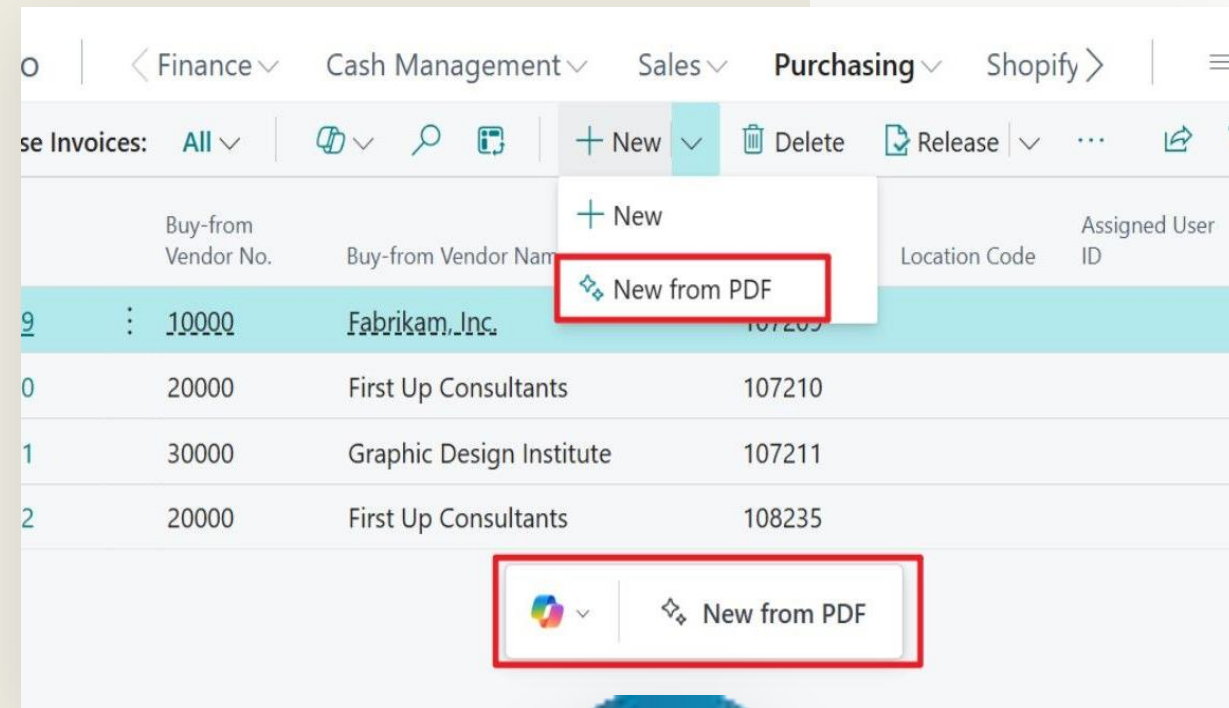
Faster Processing

Reduce Entry

Improve Efficiency

Better Accuracy

Work Smarter



Supply Chain & Operations



Streamlined drop shipment processes



Match purchase invoices to multiple receipt lines



Improved inventory & variant management



Date formulas to control posting periods



Enhanced subcontracting in production



Quality management — evaluate goods and materials



Sustainability — APIs, carbon footprint on documents



Shopify connector updates (items, variants, images)

Microsoft resources



- Looking for resources?
- aka.ms/BCAll



- Join Viva Engage to ask questions
- aka.ms/BCVivaEngage



- Join the office hours
- aka.ms/BCOfficeHours



- Watch more on YouTube
- aka.ms/BCYouTube



- Follow on LinkedIn
- aka.ms/BCLinkedIn



- aka.ms/BCPartnerPortal

Thank you

boyer...

Contact us: info@boyerassoc.com

Jennifer Bonenfant, CPA • ERP Practice Lead

jbonenfant@boyerassoc.com • boyerassoc.com

Empower your data