Microsoft Dynamics 365

Dynamics User Group Norge

DYNUG

45 Tips in 45 Minutes

Peter Jakobsen

Architect, Business Central
Microsoft Global Field and Partner Center of Excellence

Peter.Jakobsen@microsoft.com

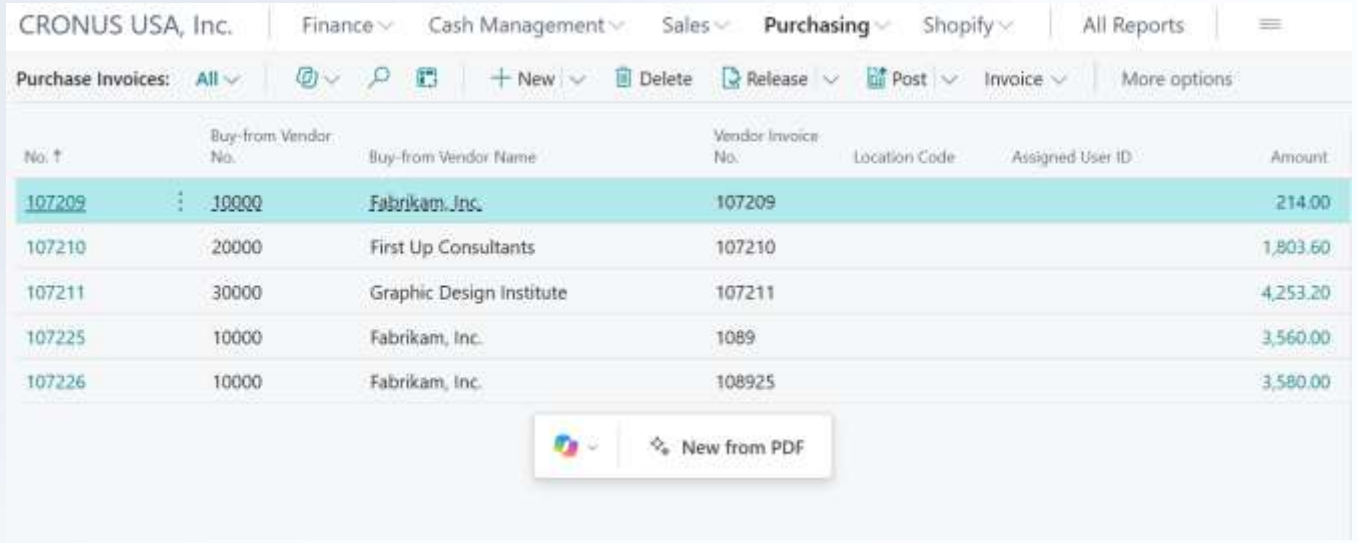
https://www.linkedin.com/in/peter-jakobsen-bc-rocks

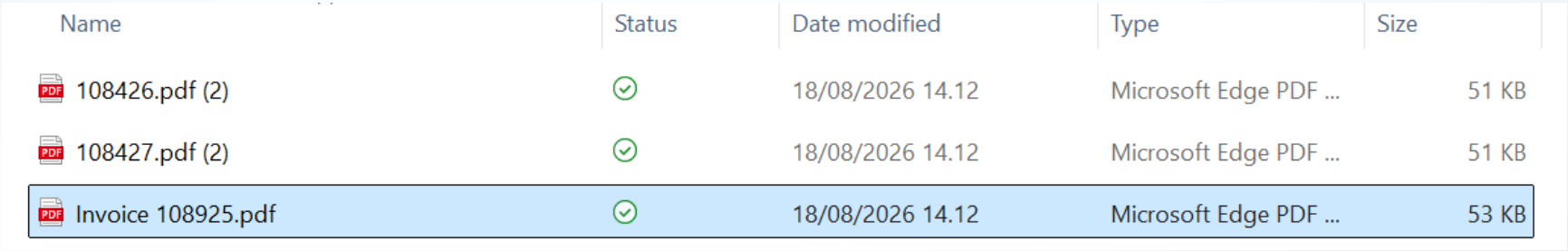
NEW



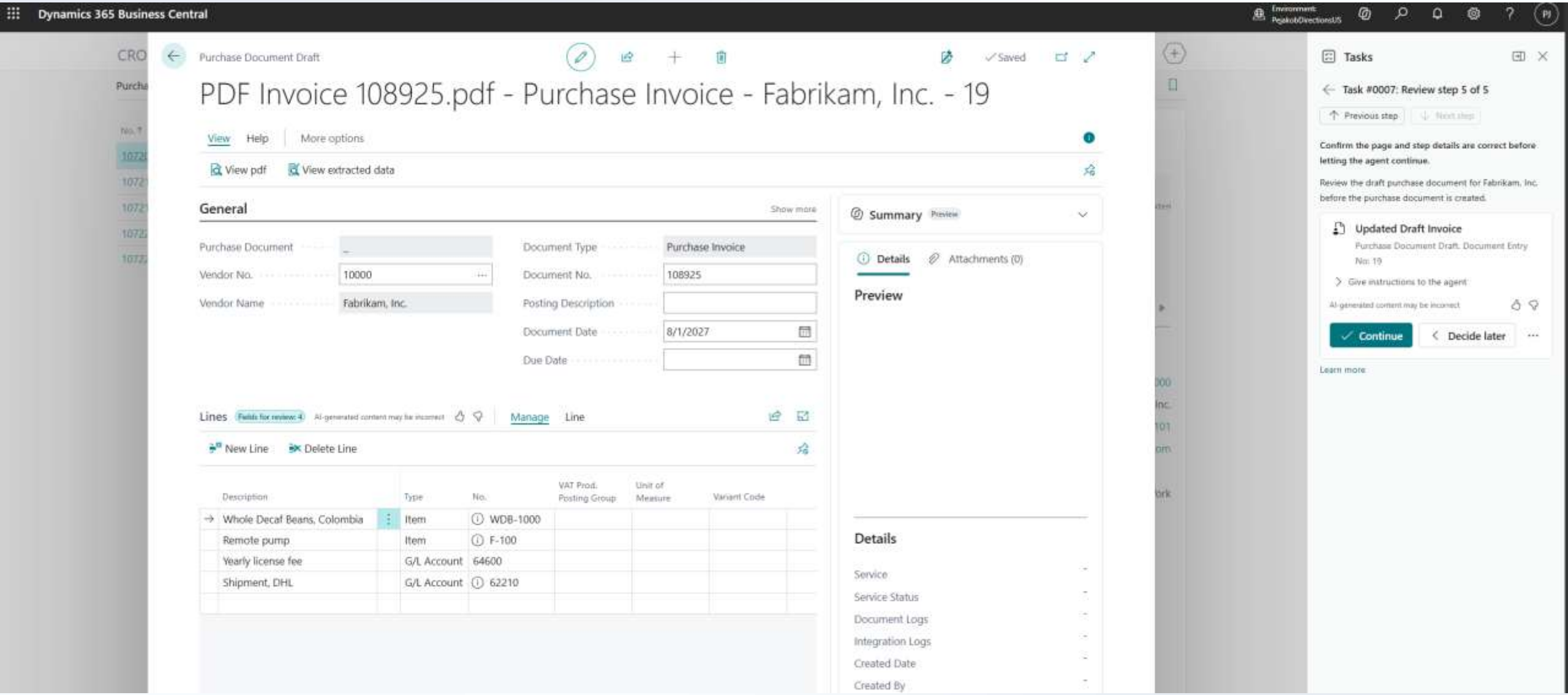
Tip # 1

#1: Create purchase invoice from PDF





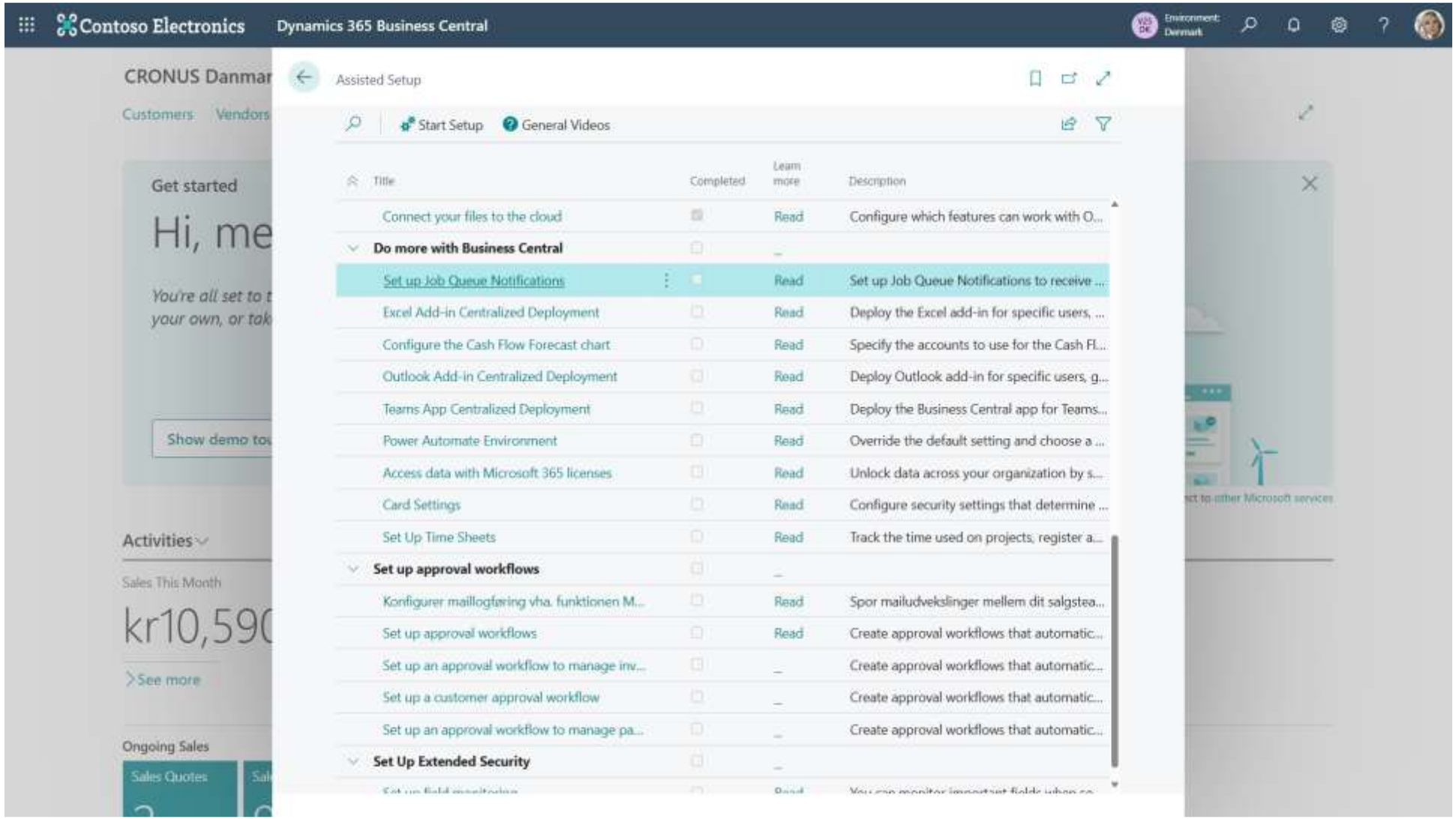
#1: Create purchase invoice from PDF



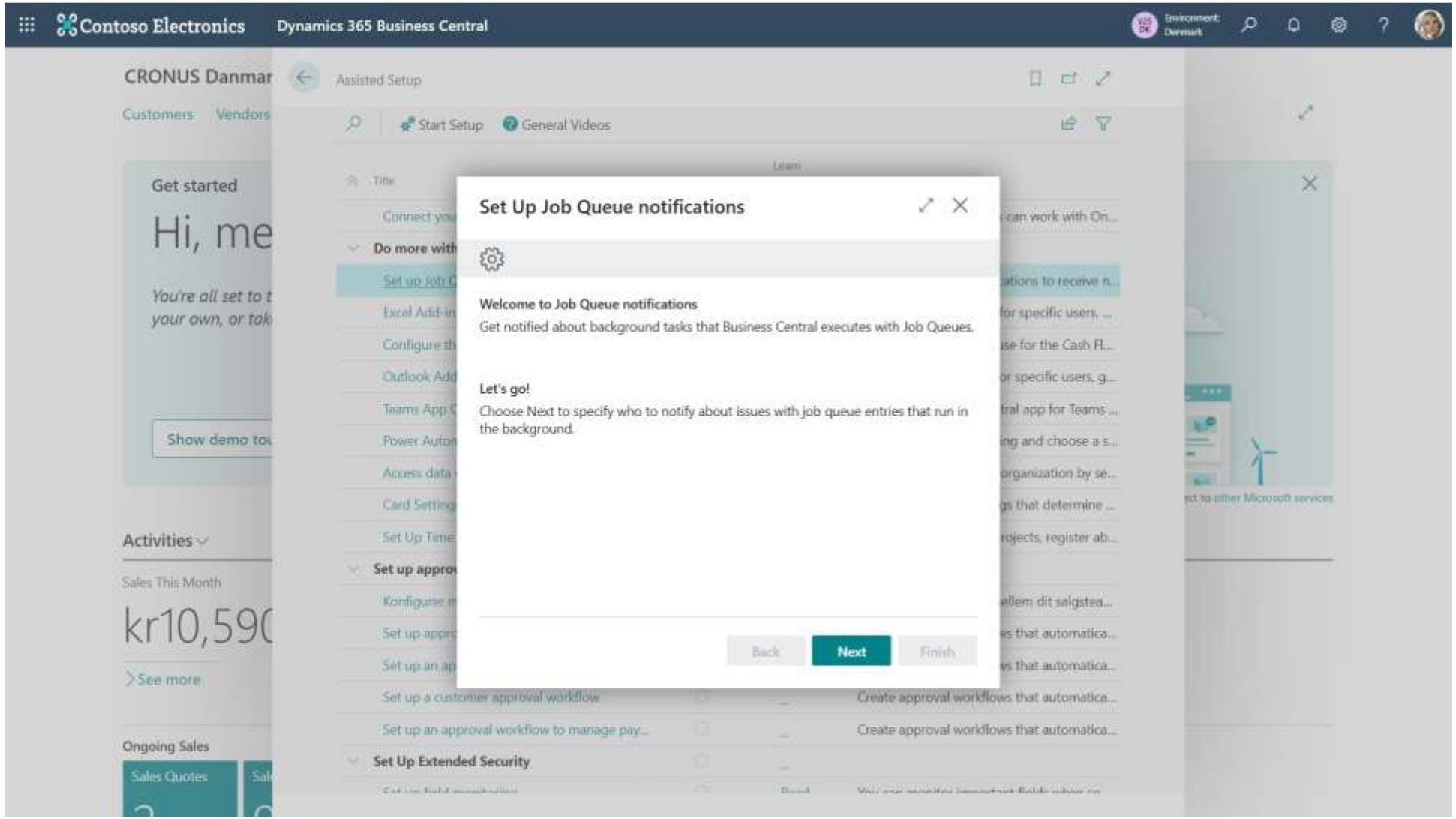


Tip # 2

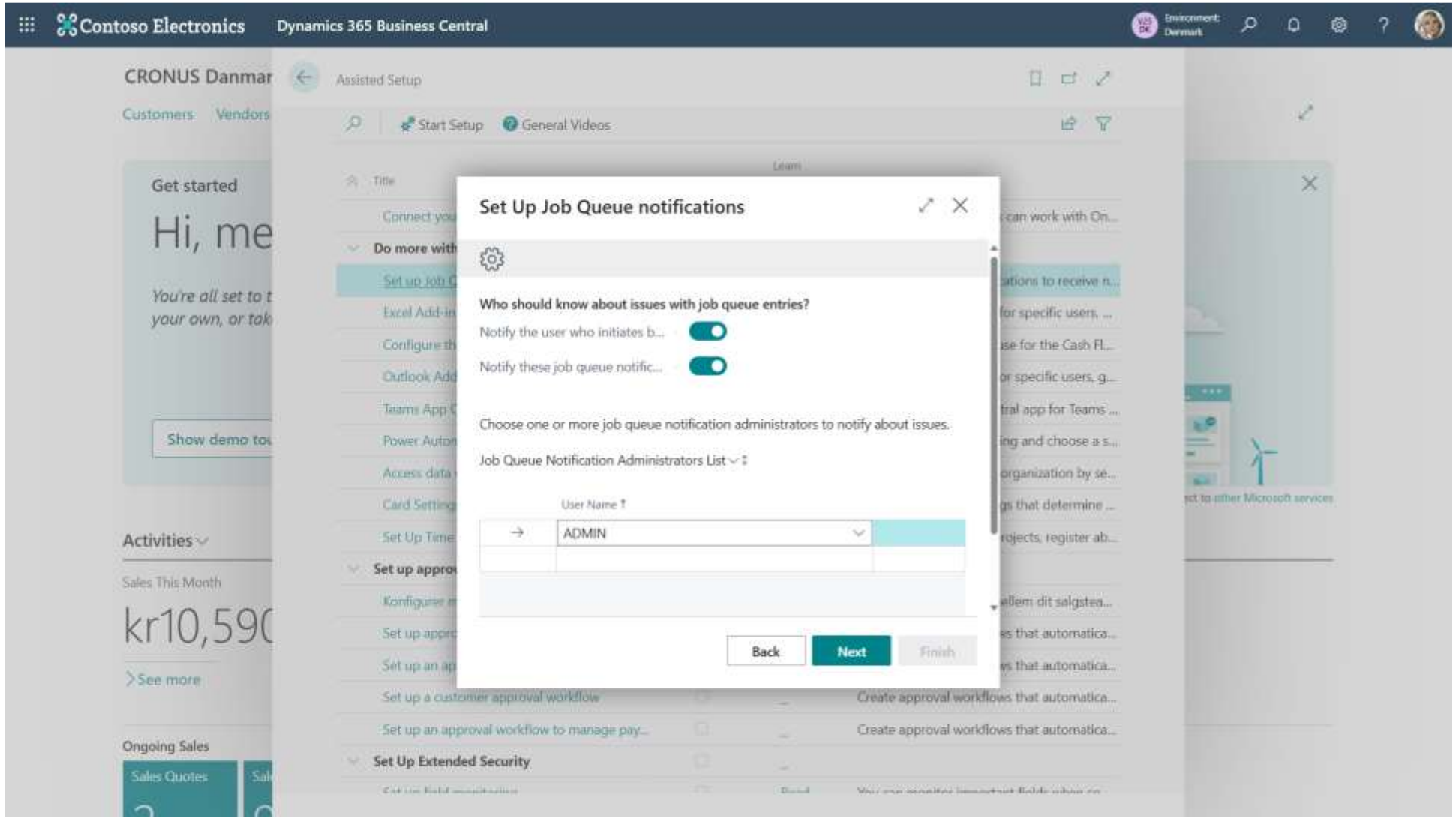
#2: Get notified about Job Queue failures



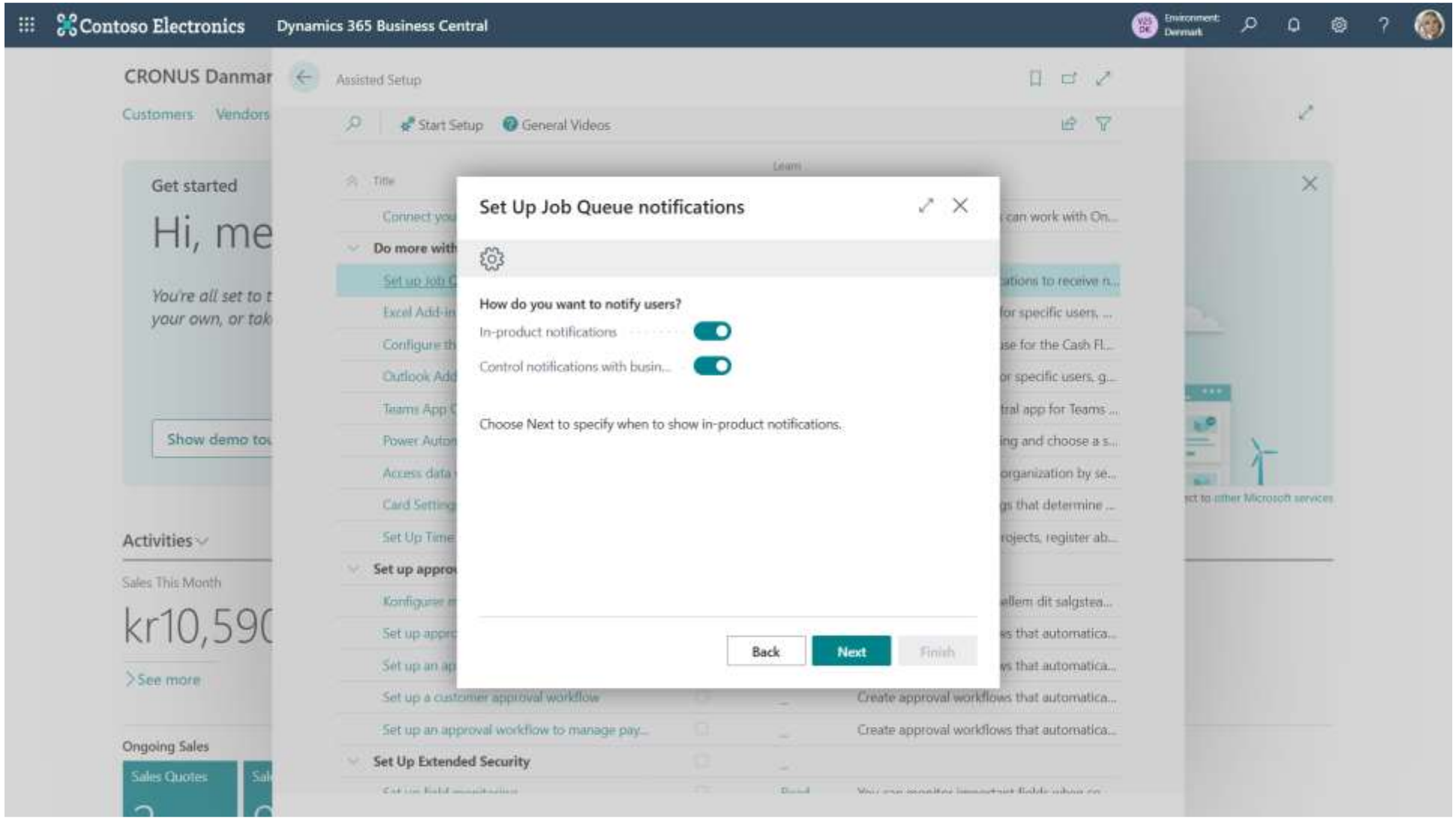
#2: Get notified about Job Queue failures



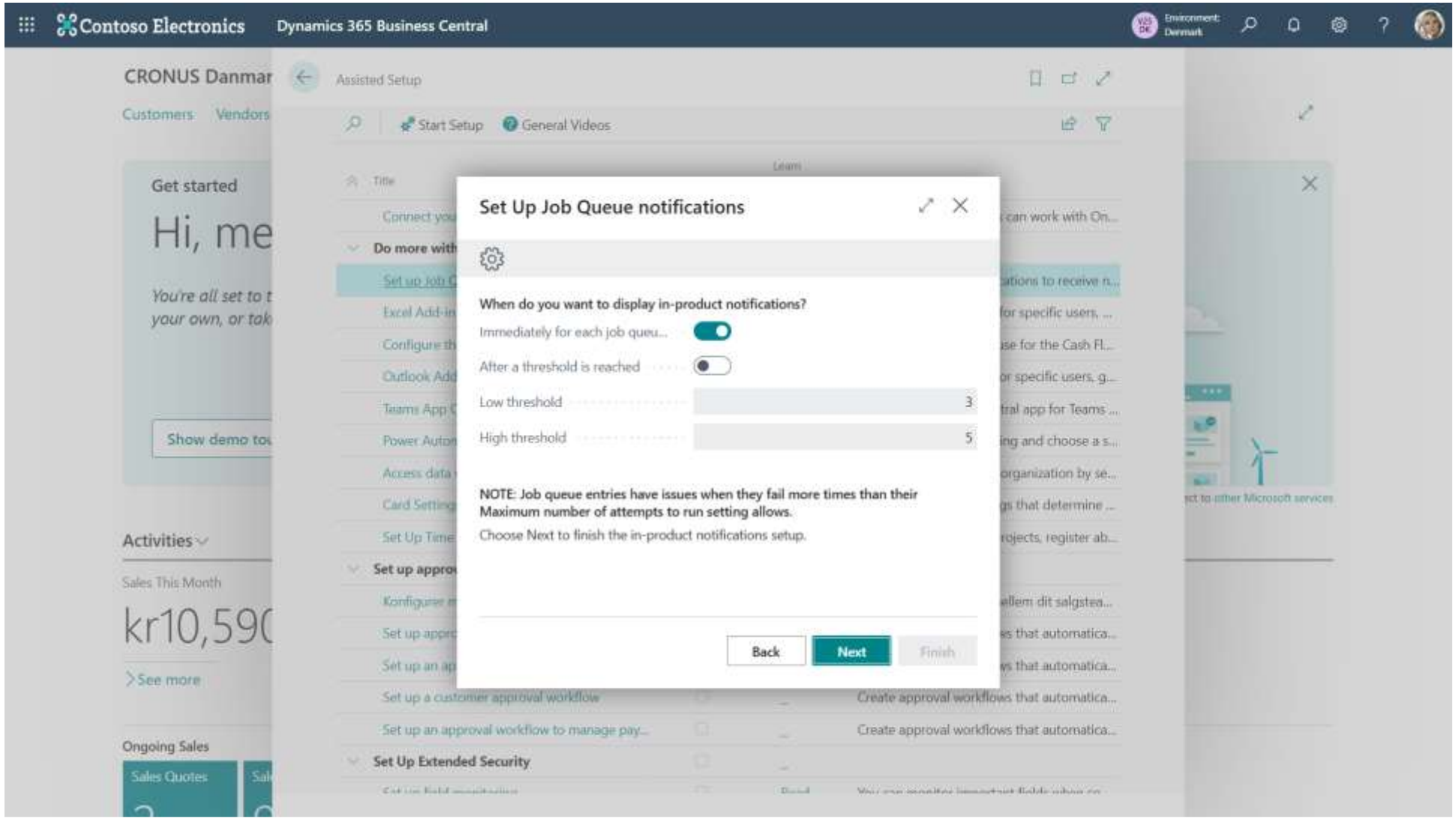
#2: Get notified about Job Queue failures



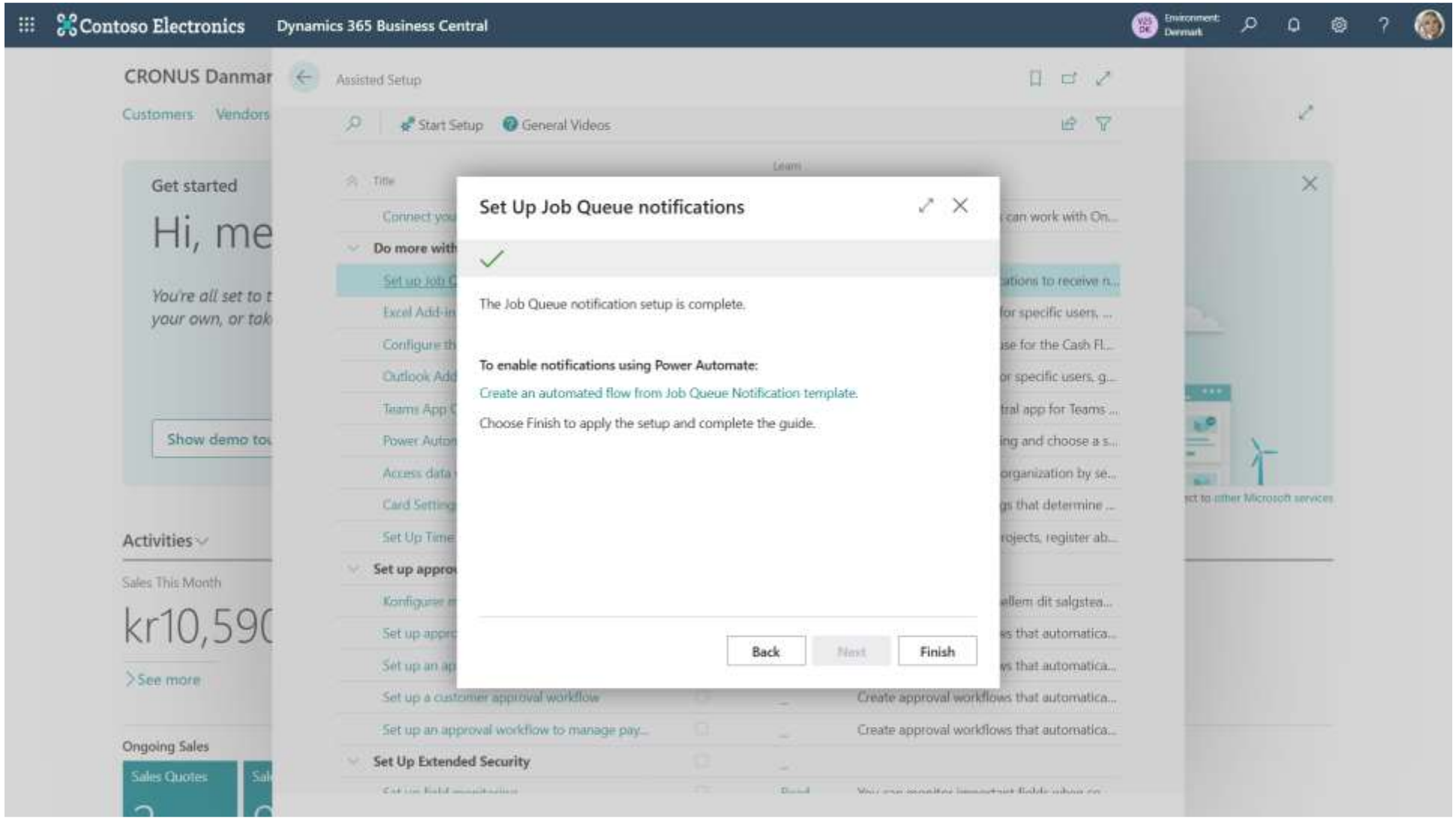
#2: Get notified about Job Queue failures



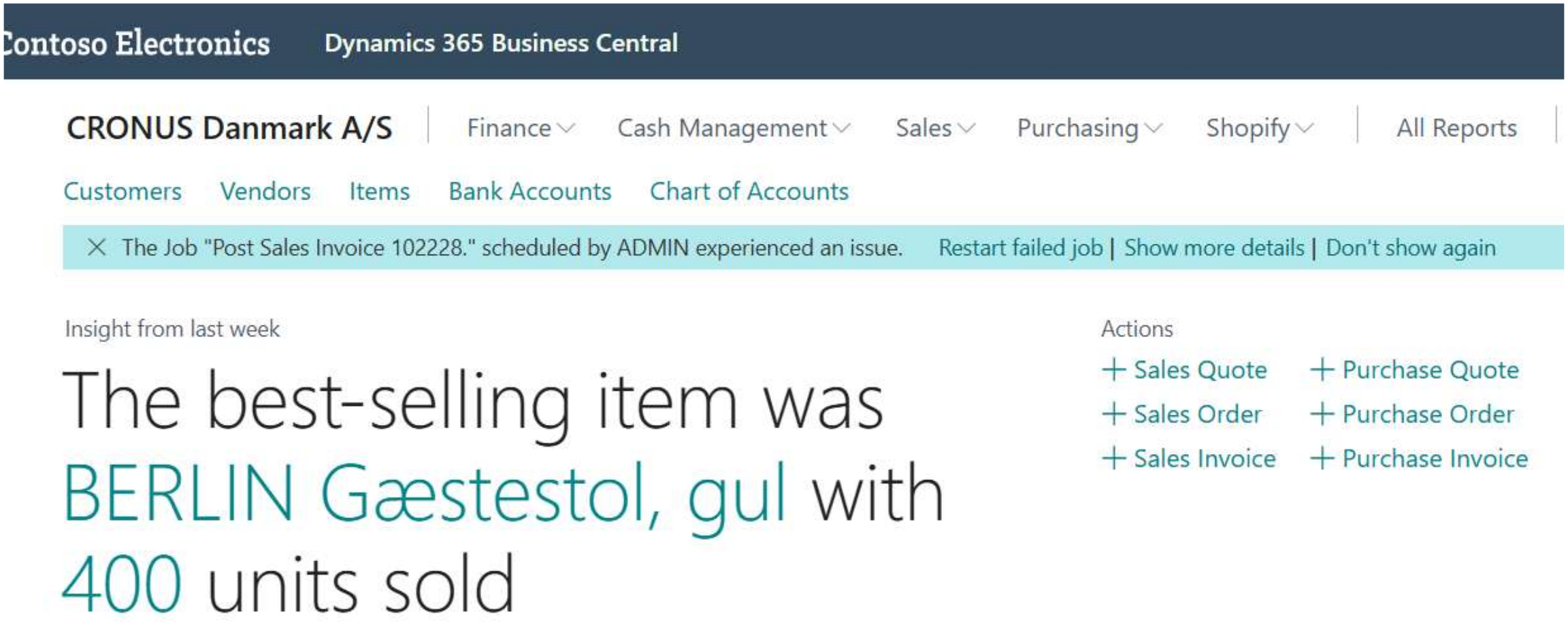
#2: Get notified about Job Queue failures



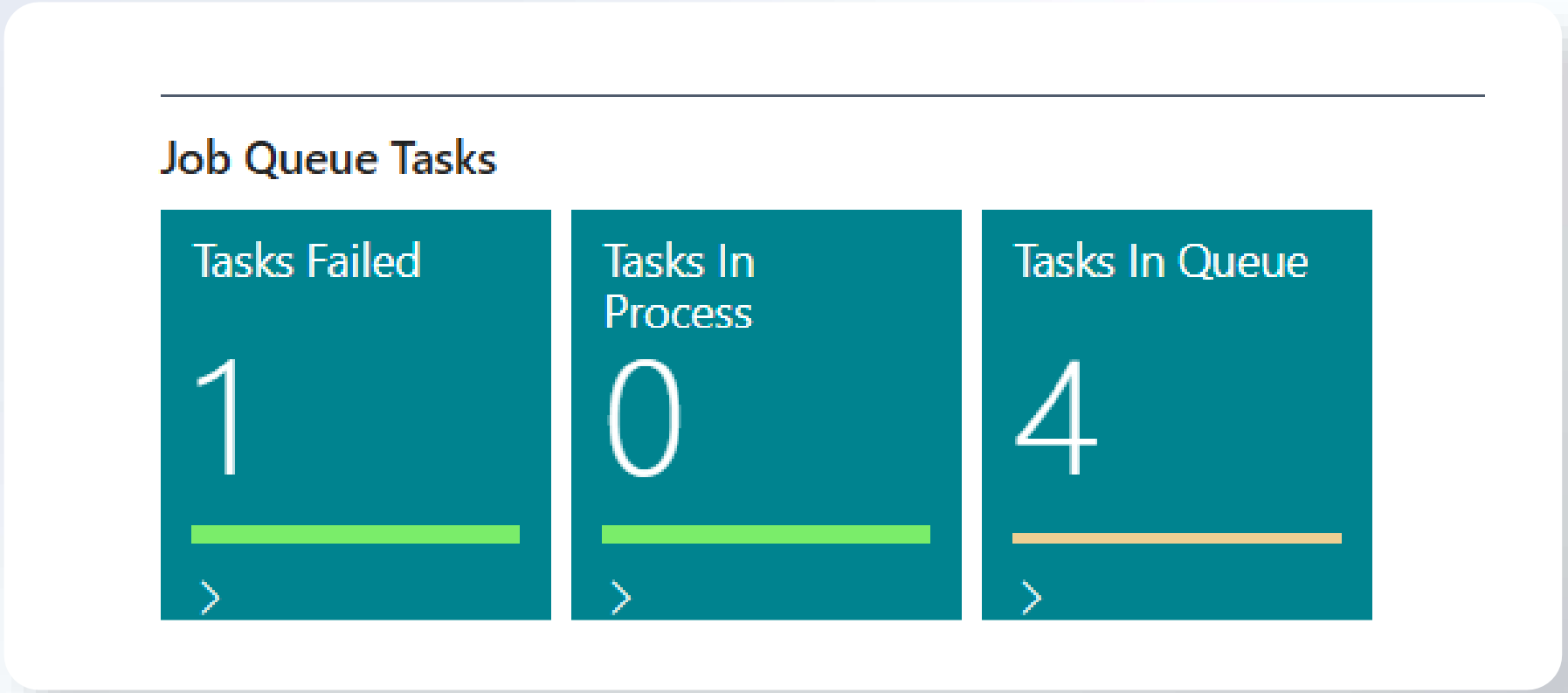
#2: Get notified about Job Queue failures



#2: Get notified about Job Queue failures



#2: Get notified about Job Queue failures



Regular users see their own job queues

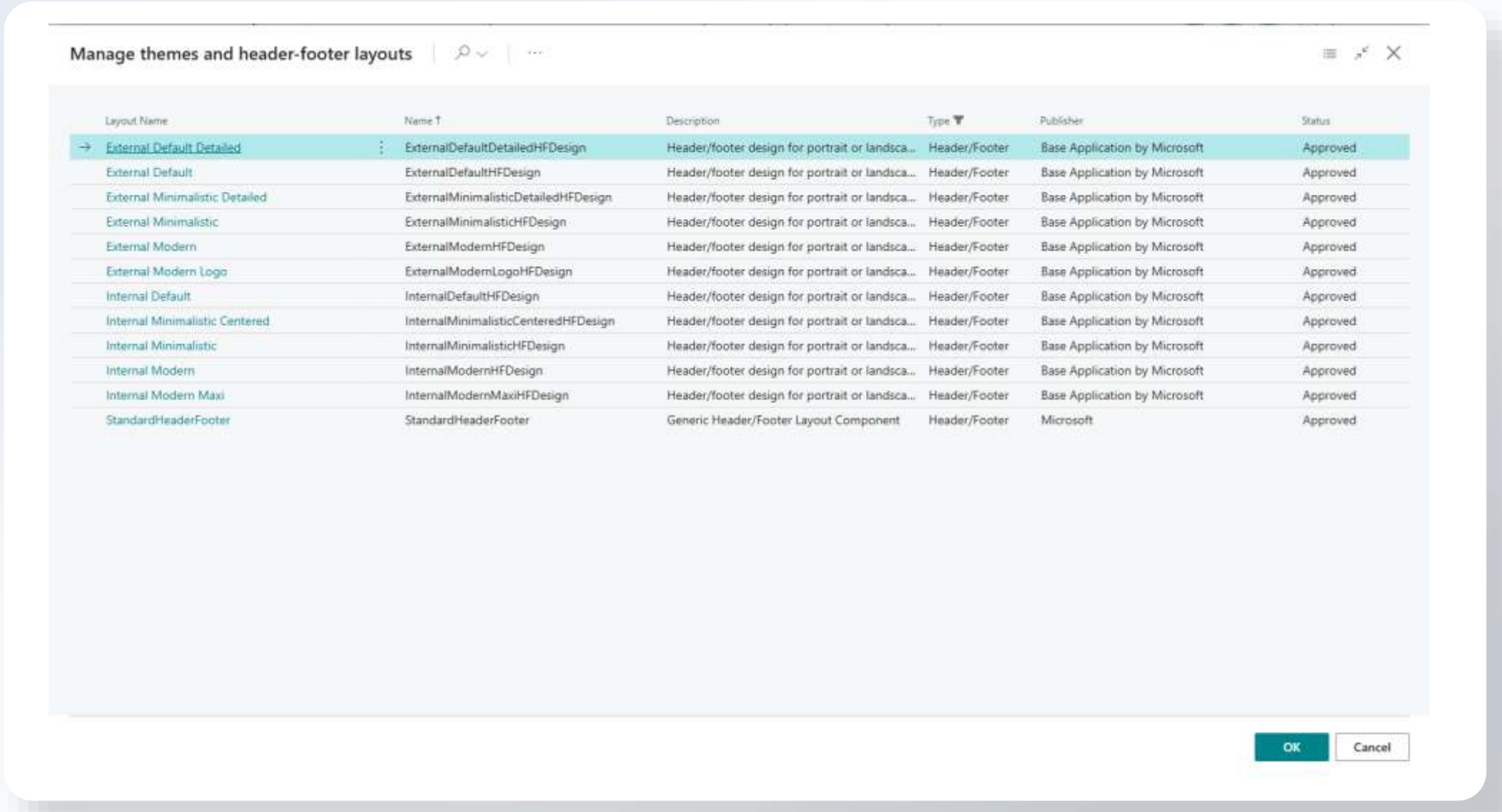
Job Queue Notification Administrators see all

NEW

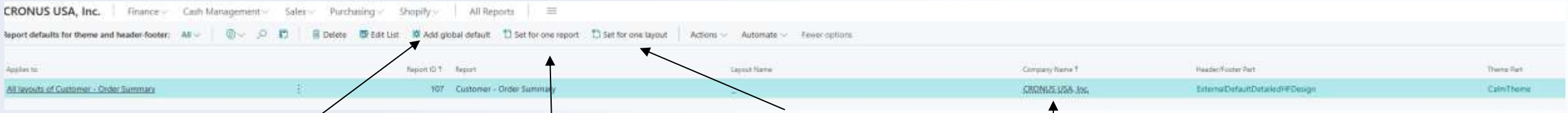


Tip # 3

#3: Header/Footer and themes in Reports



#3: Header/Footer and themes in Reports



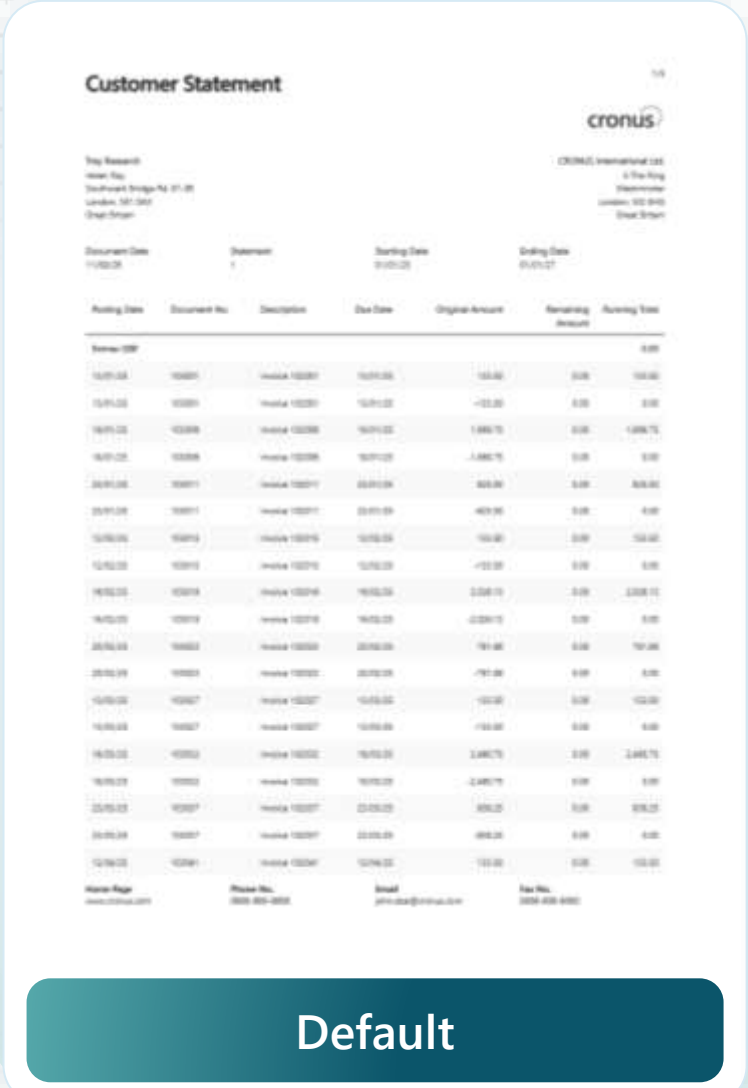
Global for all reports

Set for one report

Set for one Layout

Blank for all companies or specify company

Same body layout, same header/footer, three themes



Default



Calm



Playful

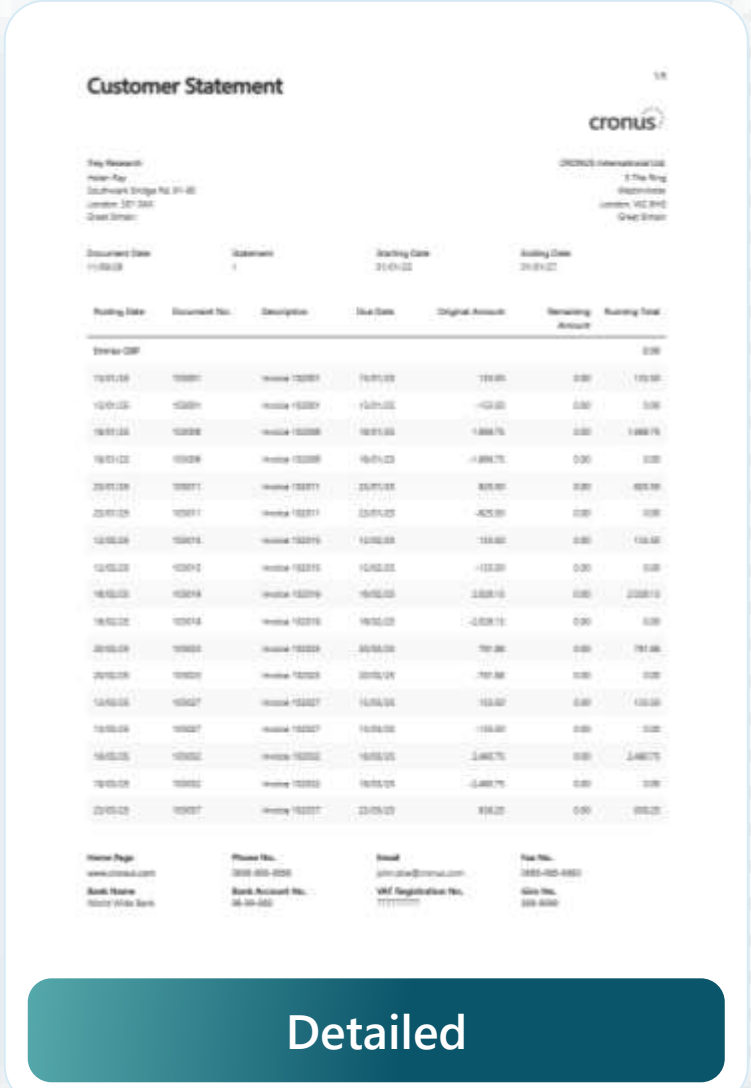
Same body layout, three different header/footer layouts



Default



Modern



Detailed

NEW



Tip # 4

#4: Get Copilot Trial Licenses



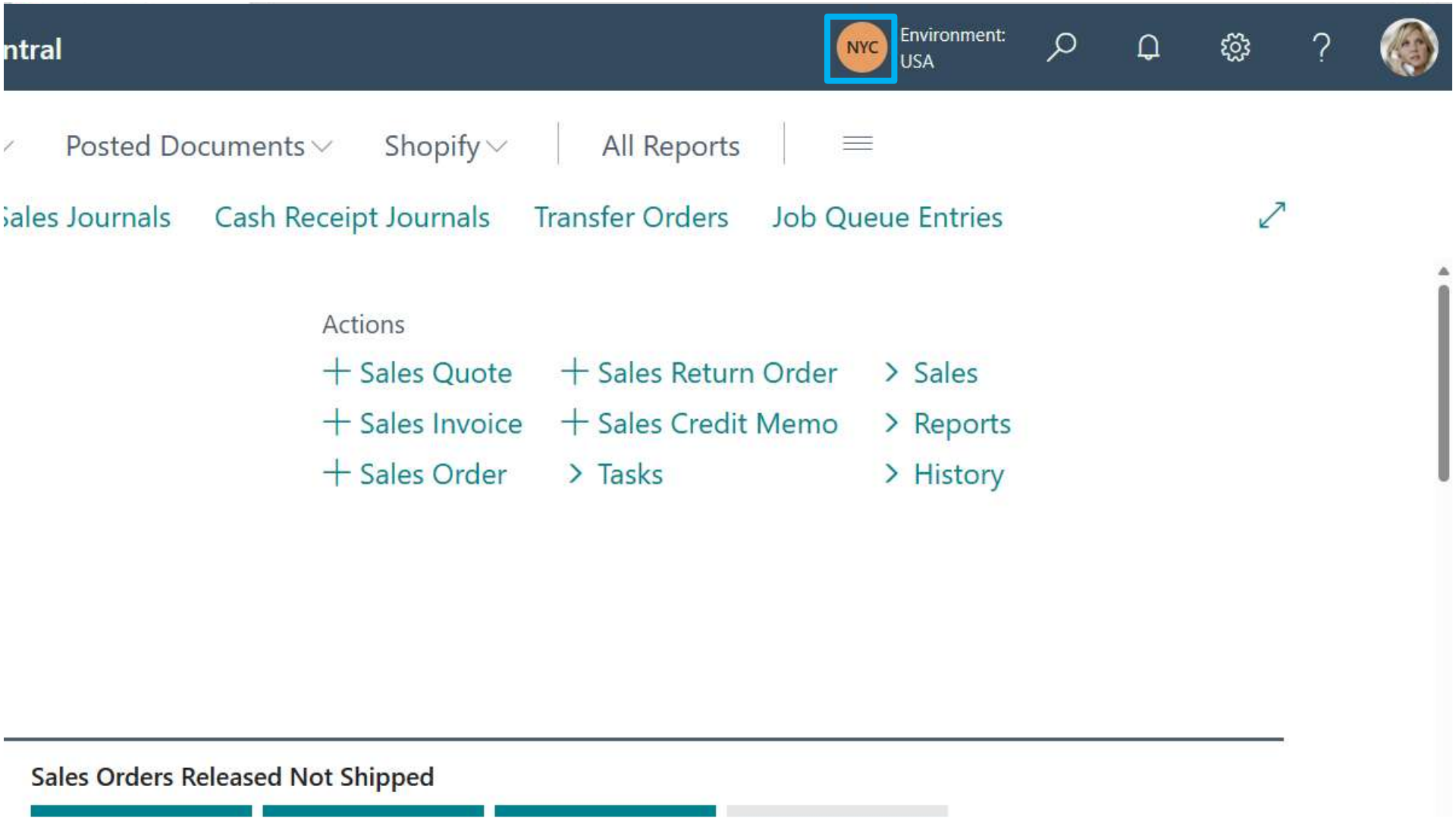
Attach 30 day Copilot licenses:

https://aka.ms/CopilotIn30

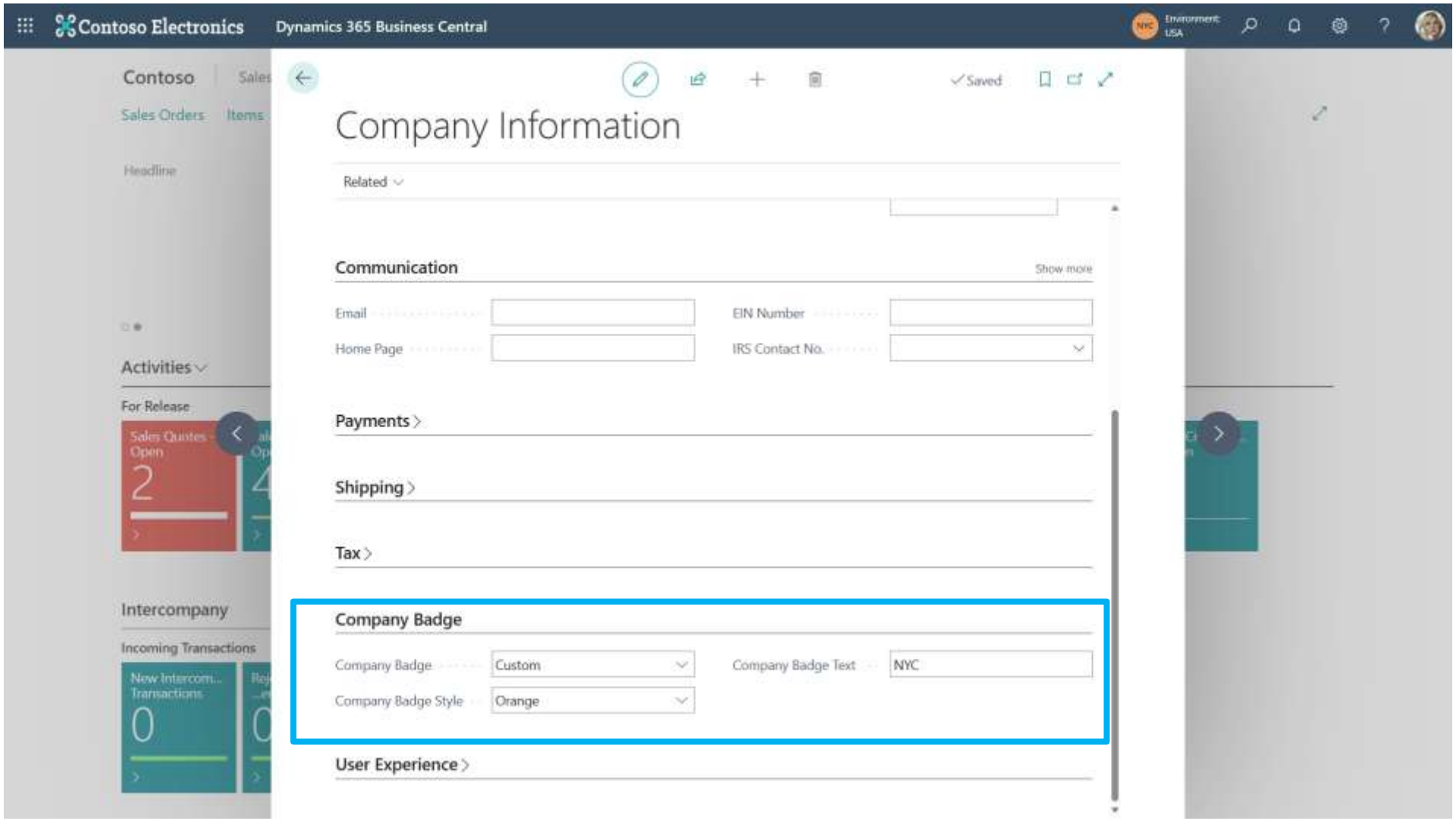


Tip # 5

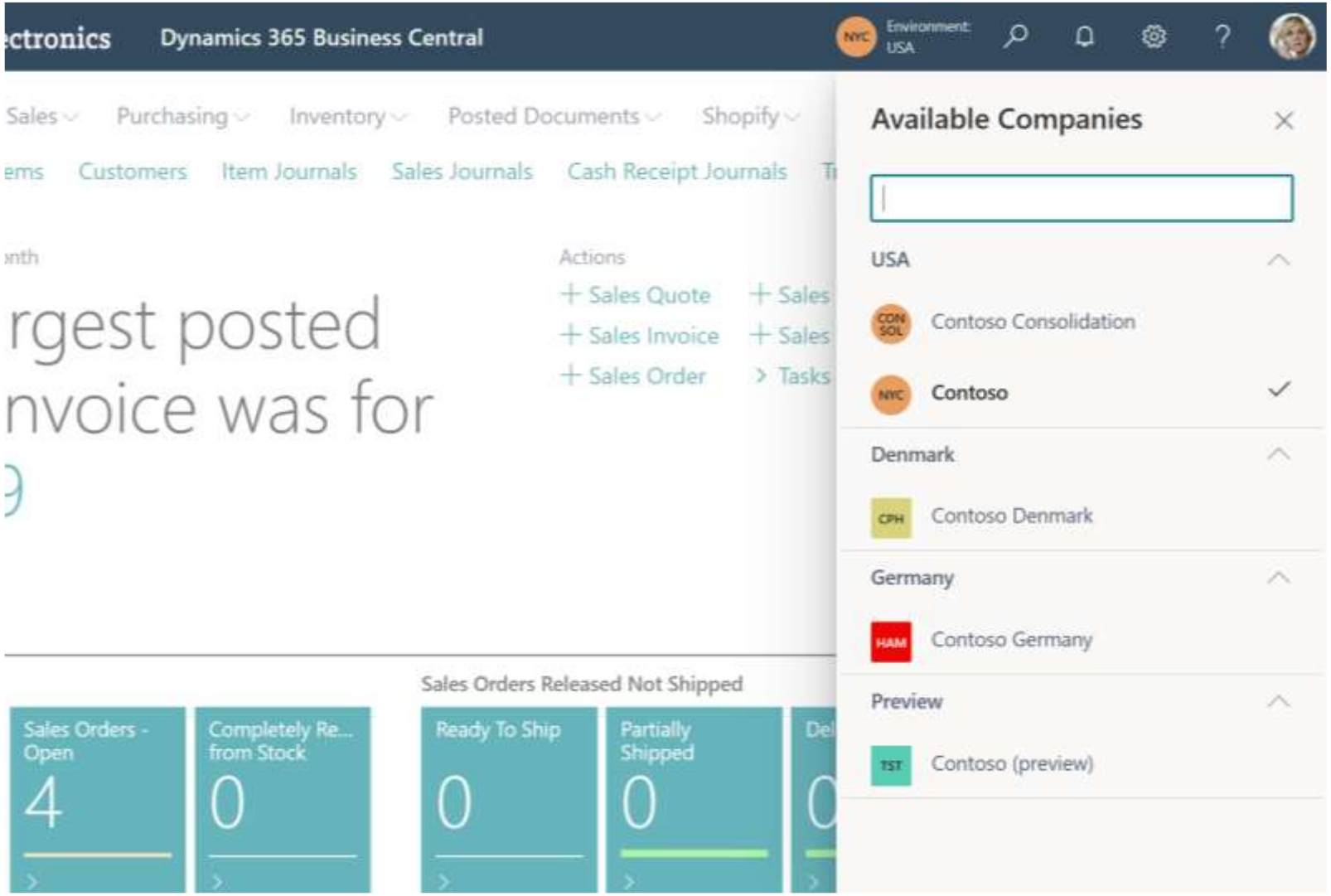
#5: Use a company badge to help identify the company



#5: Use a company badge to help identify the company



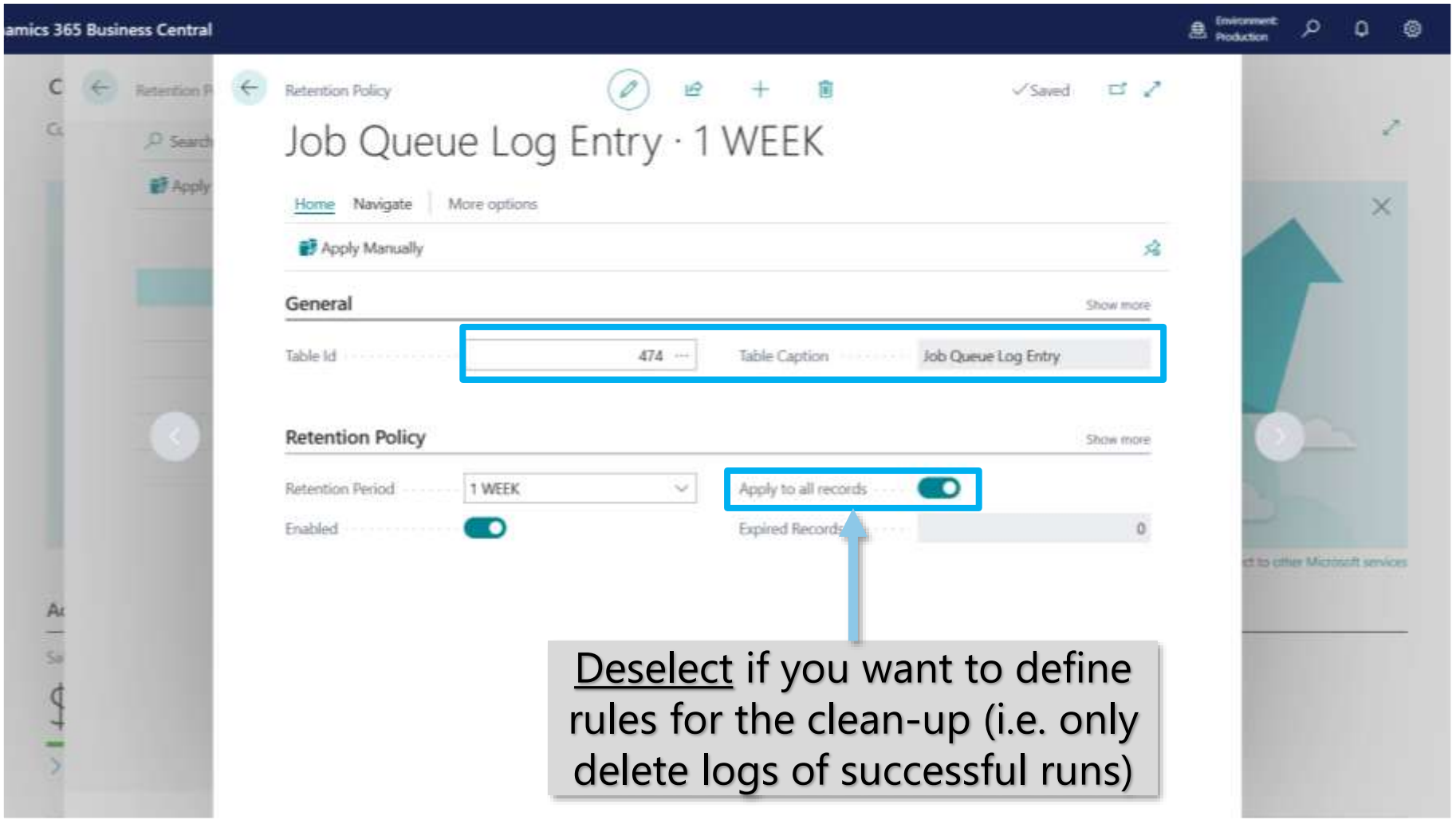
#5: Use a company badge to help identify the company



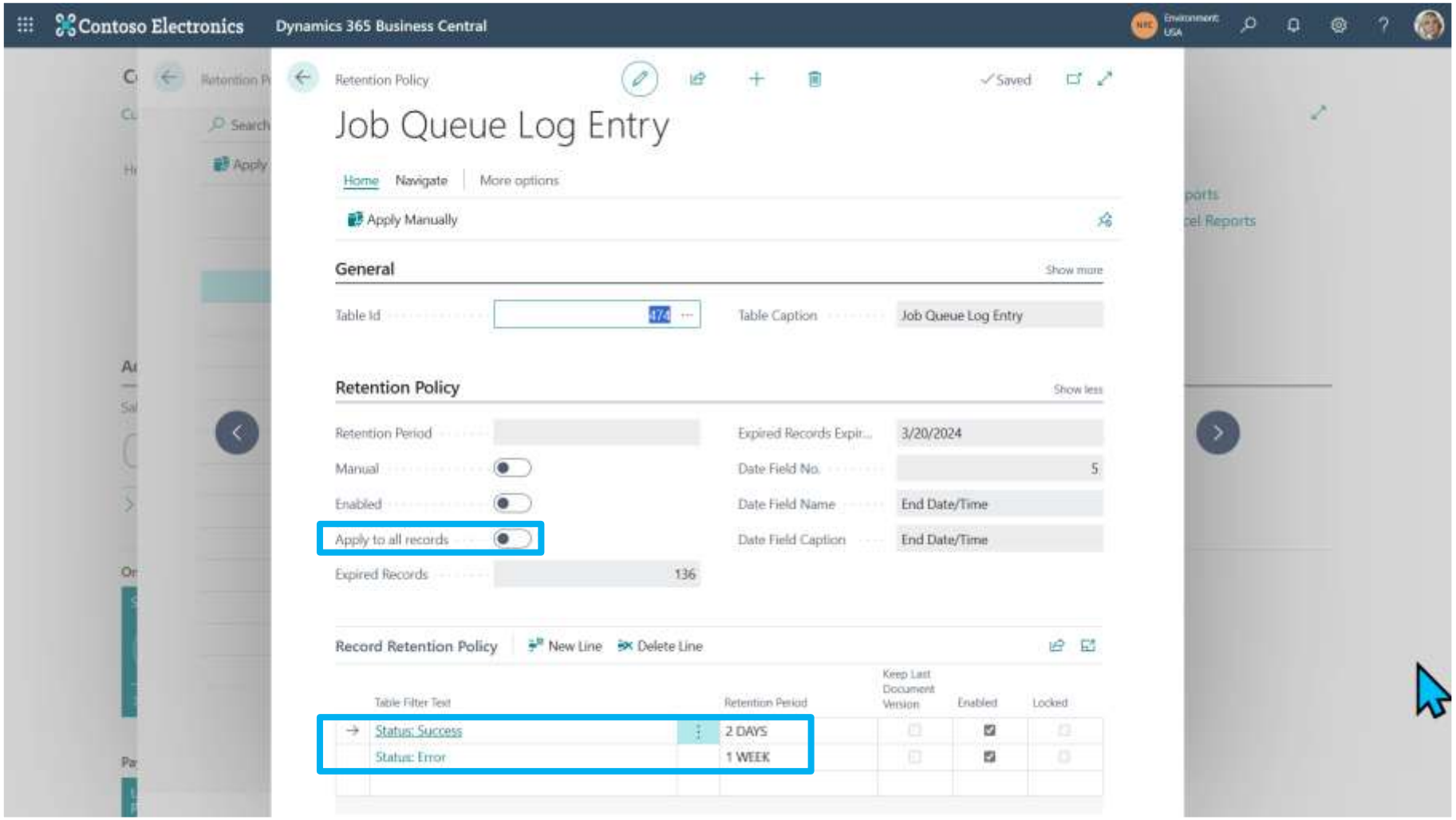


Tip # 6

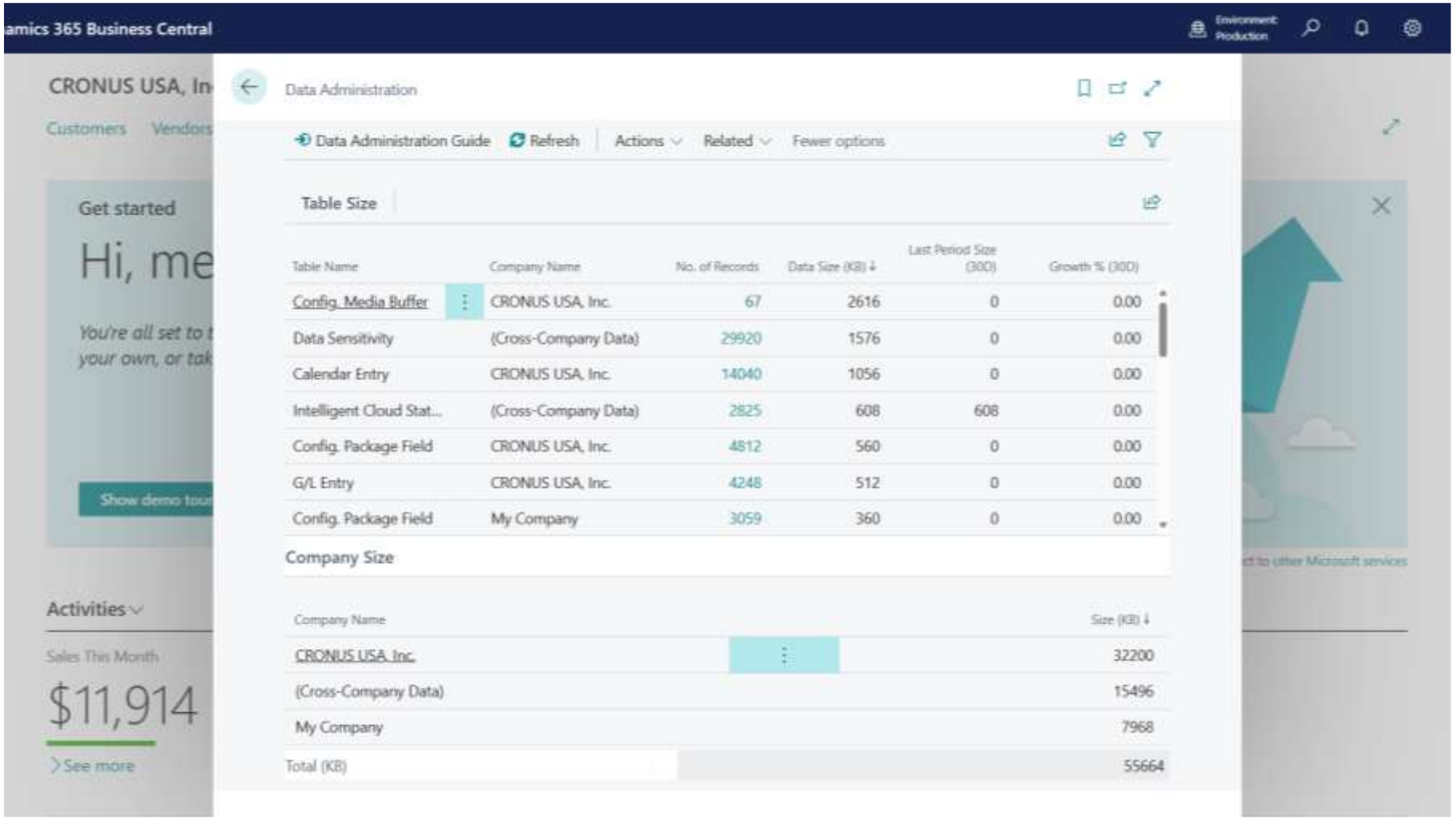
#6: Save database cost. Use Retention Policies to automatically clean up data



#6: Save database cost. Use Retention Policies to automatically clean up data



#6: Save database cost. Get company & table size from Data Administration



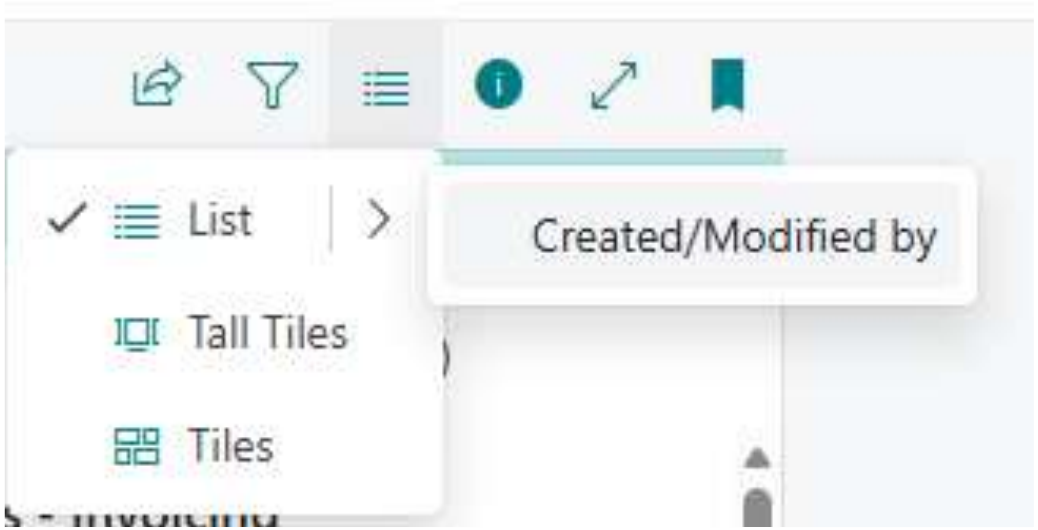
NEW



Tip # 7

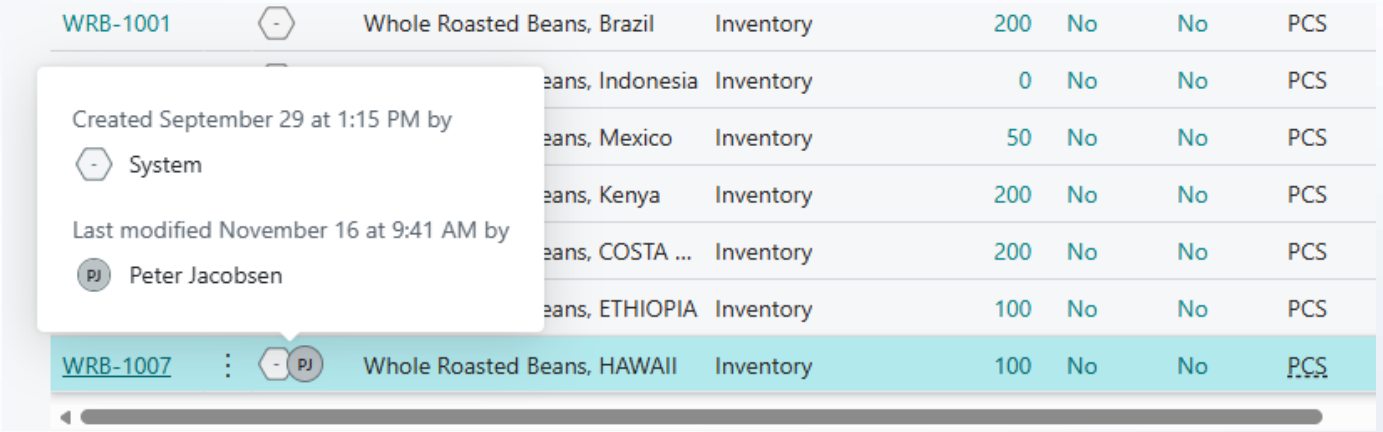
Setup tip # 7: Show Avatars on lists

- Select the **layout icon** in the upper-right corner of the list.
- Choose **List > Created/Modified by**.
- Business Central displays a **By** column containing avatars identifying who created or last modified each record.



#7: Show Avatars on lists

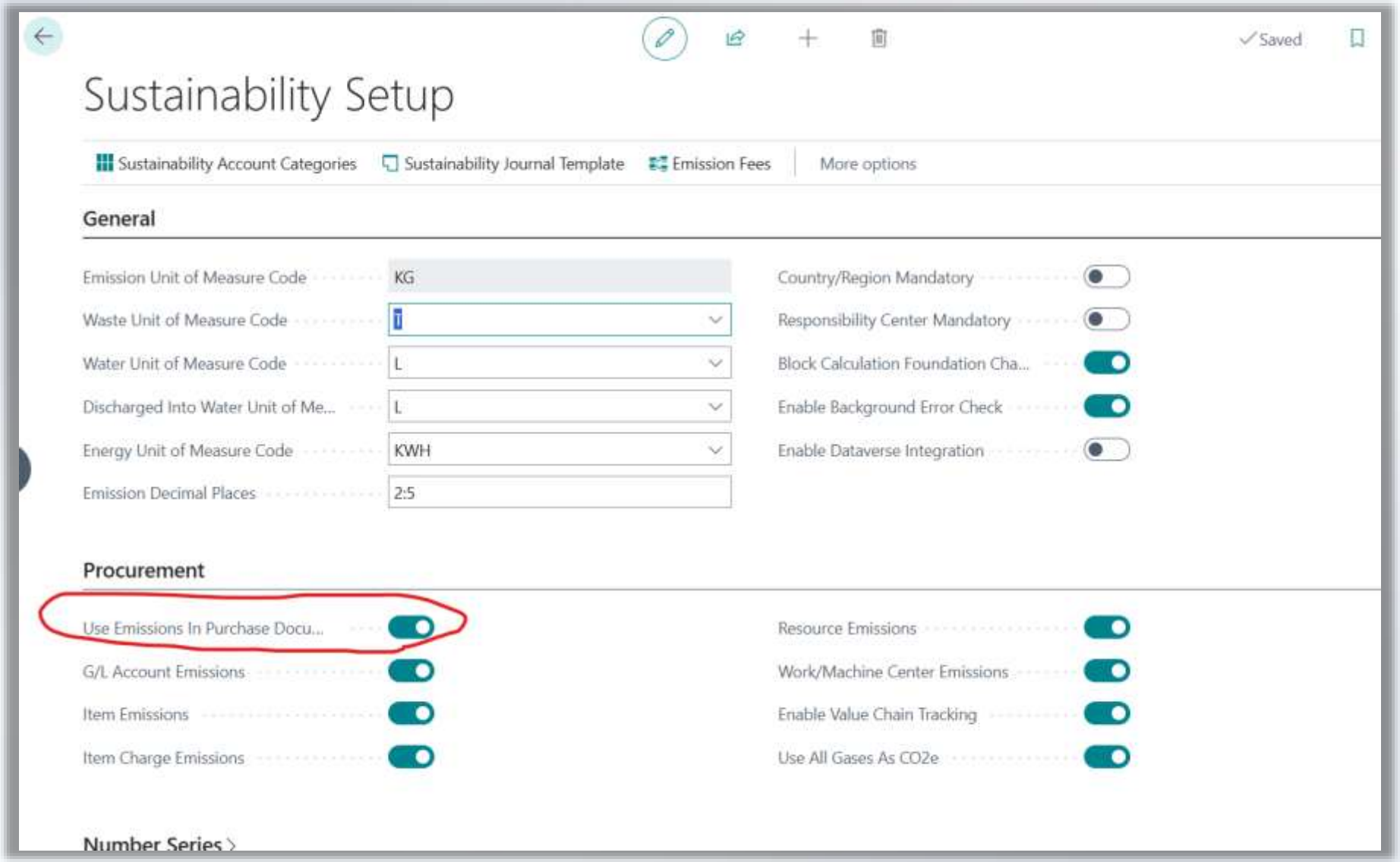
Hover over an avatar to see who created and last modified the record.



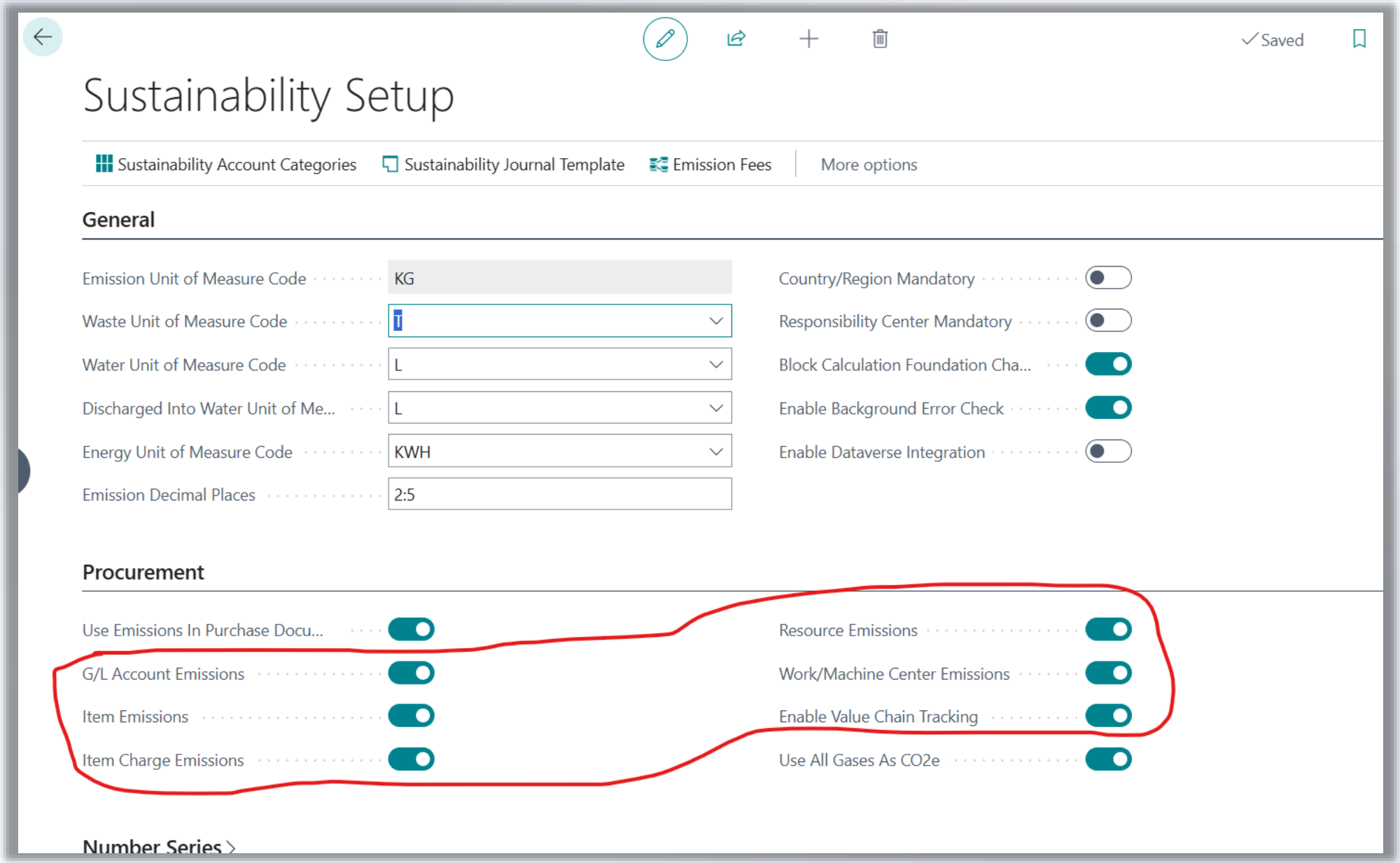


Tip # 8

#8: Enable emission fields and calculate through all operations



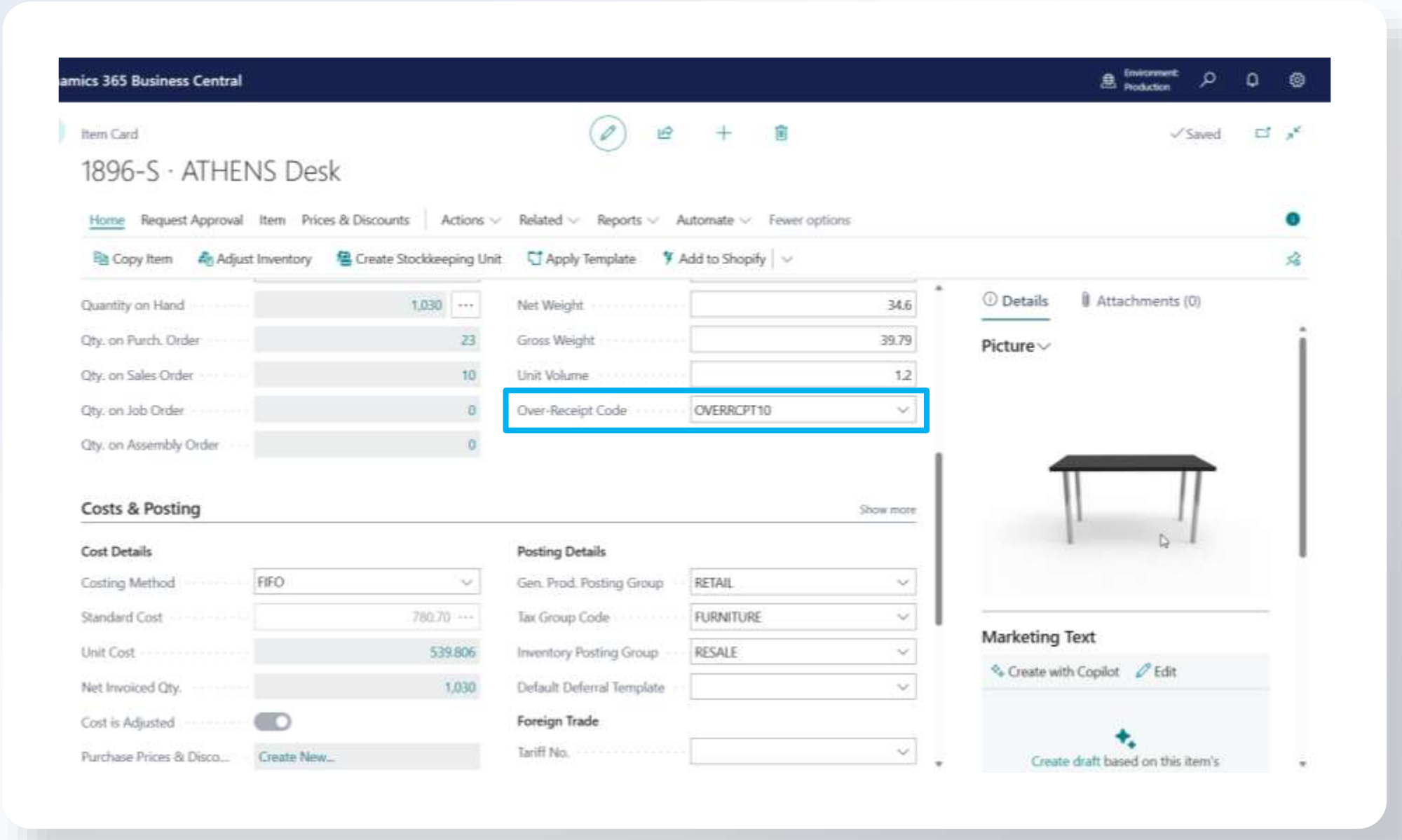
#8: Enable emission fields and calculate through all operations



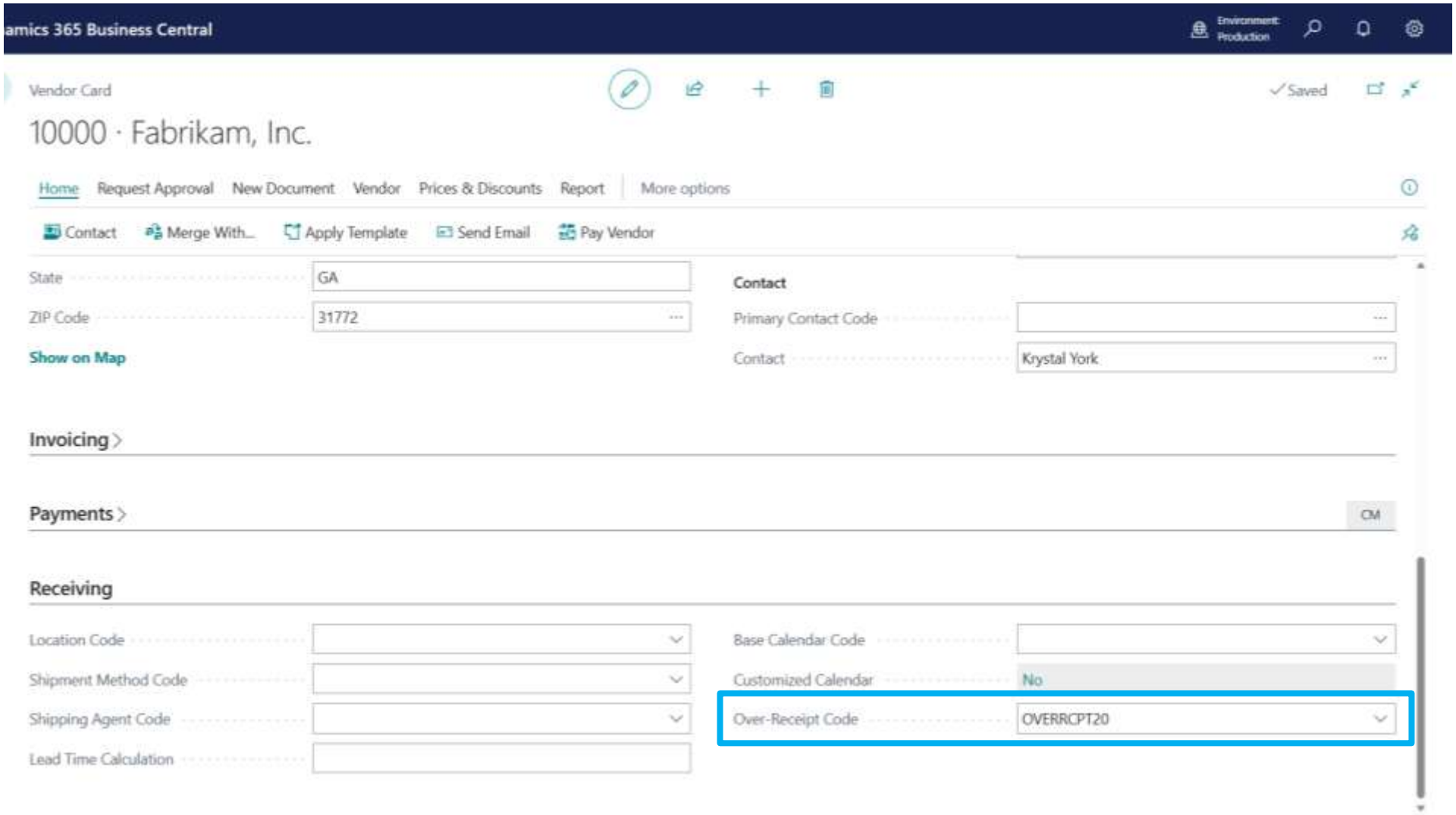


Tip # 9

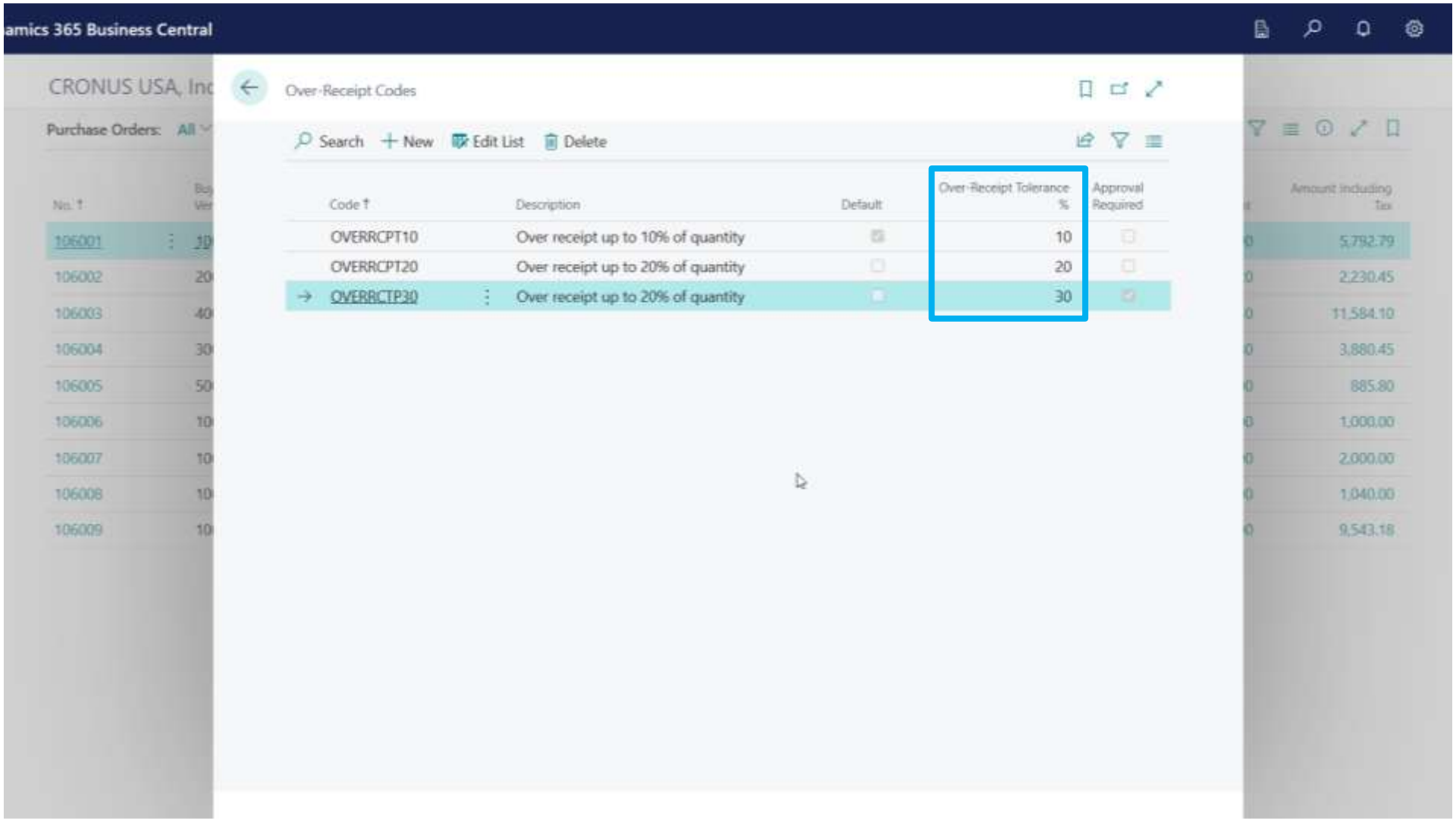
#9: Allow for over-receiving items when receiving purchases



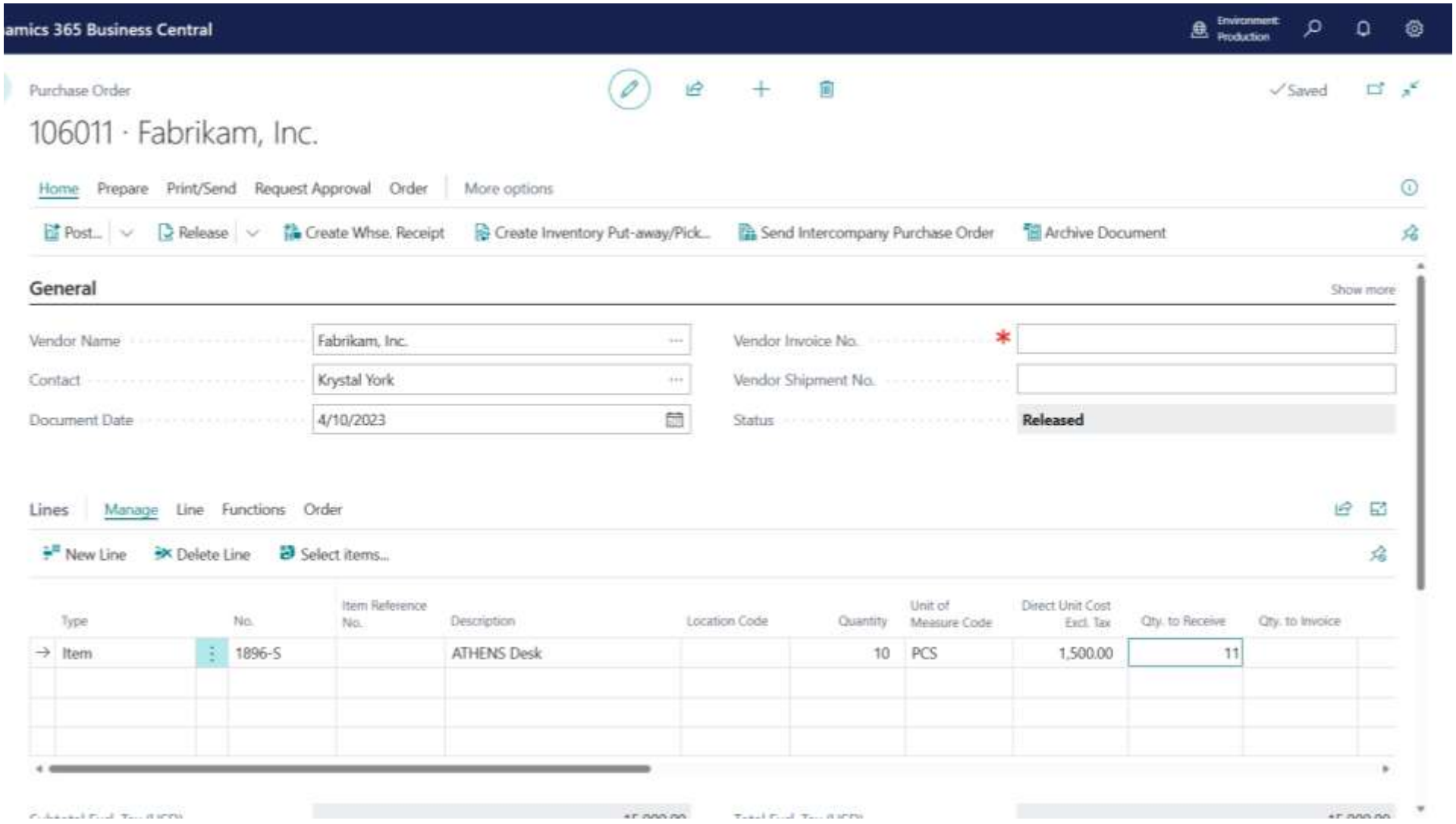
#9: Allow for over-receiving items when receiving purchases



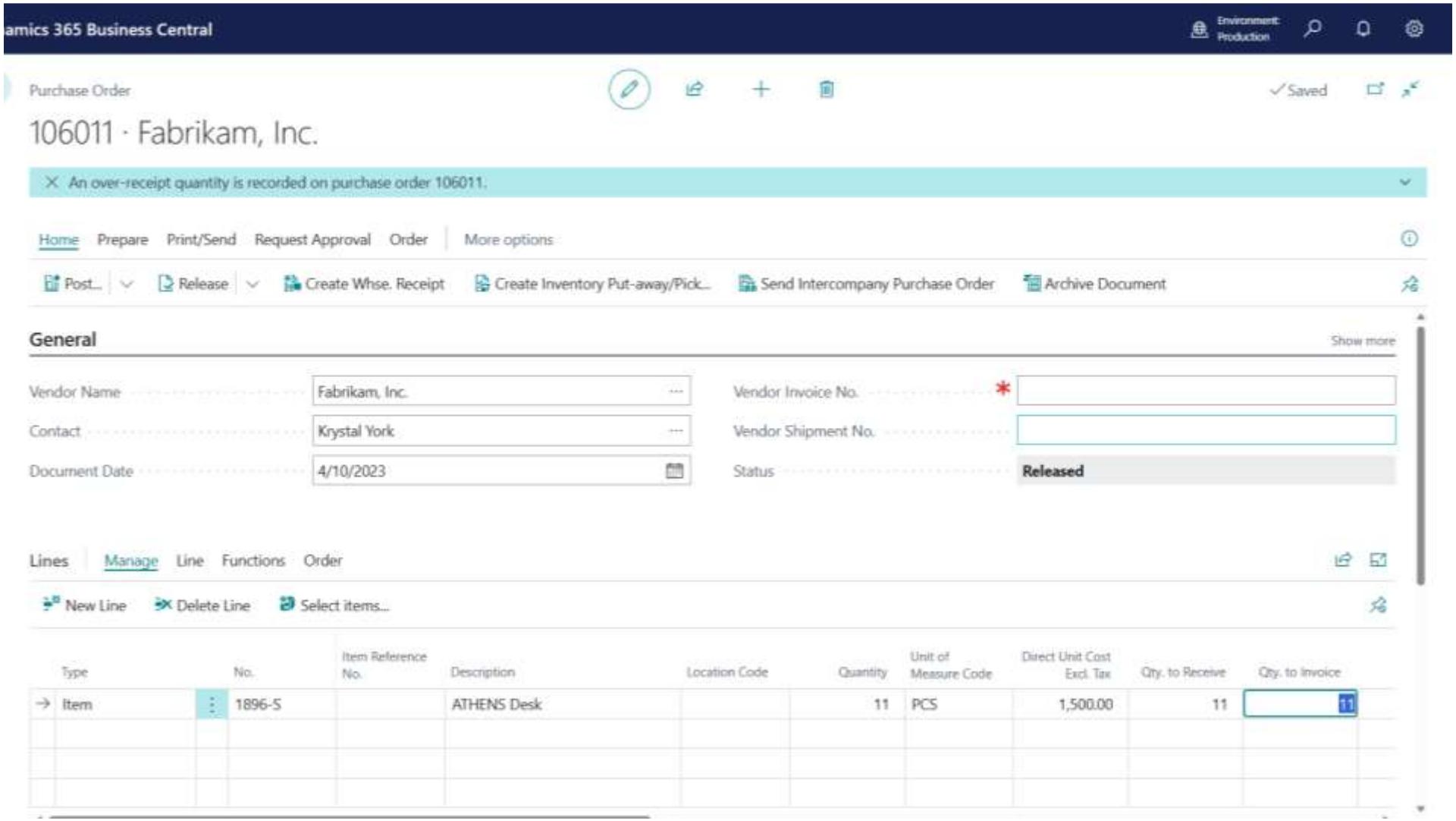
#9: Allow for over-receiving items when receiving purchases



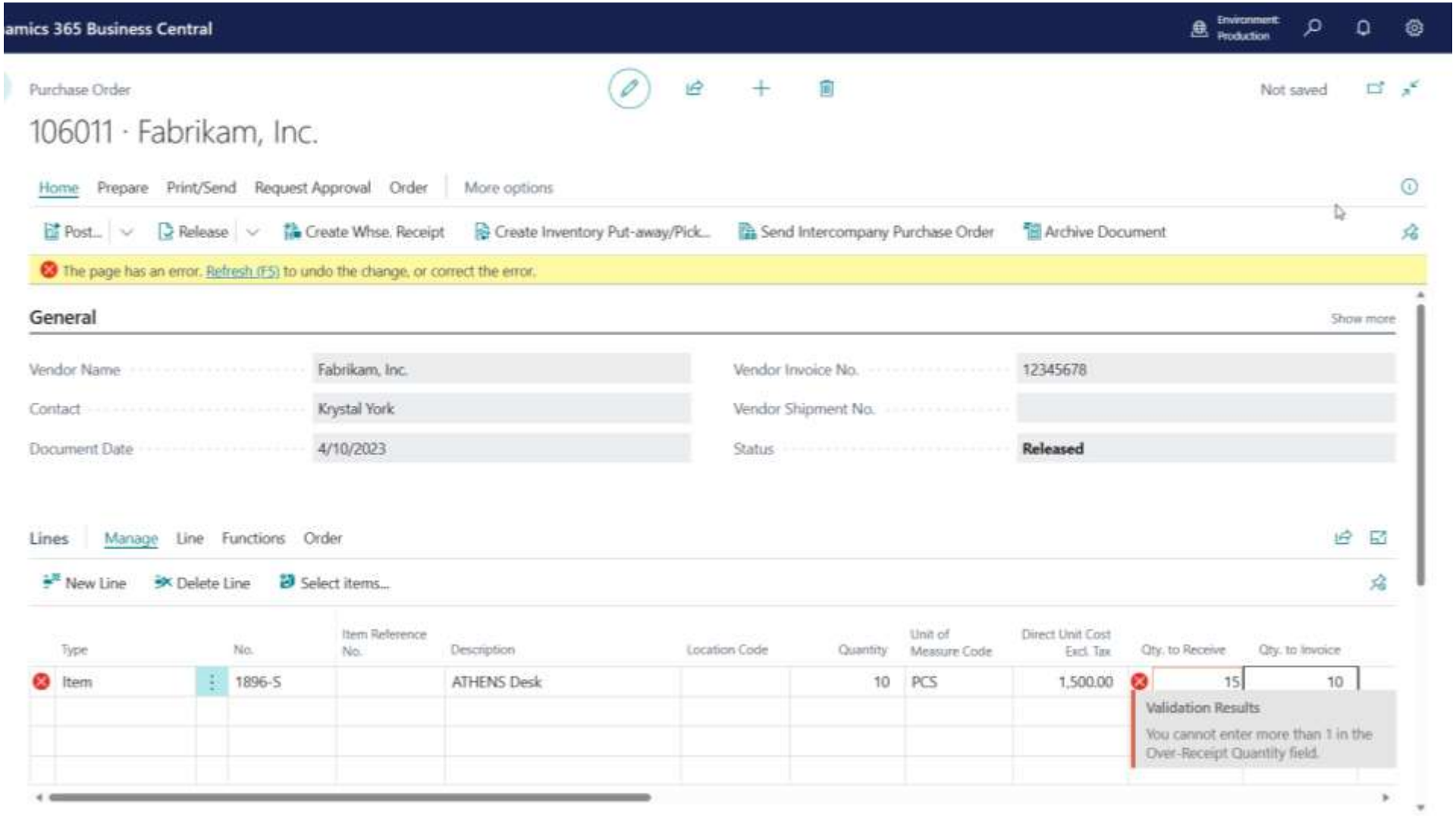
#9: Allow for over-receiving items when receiving purchases



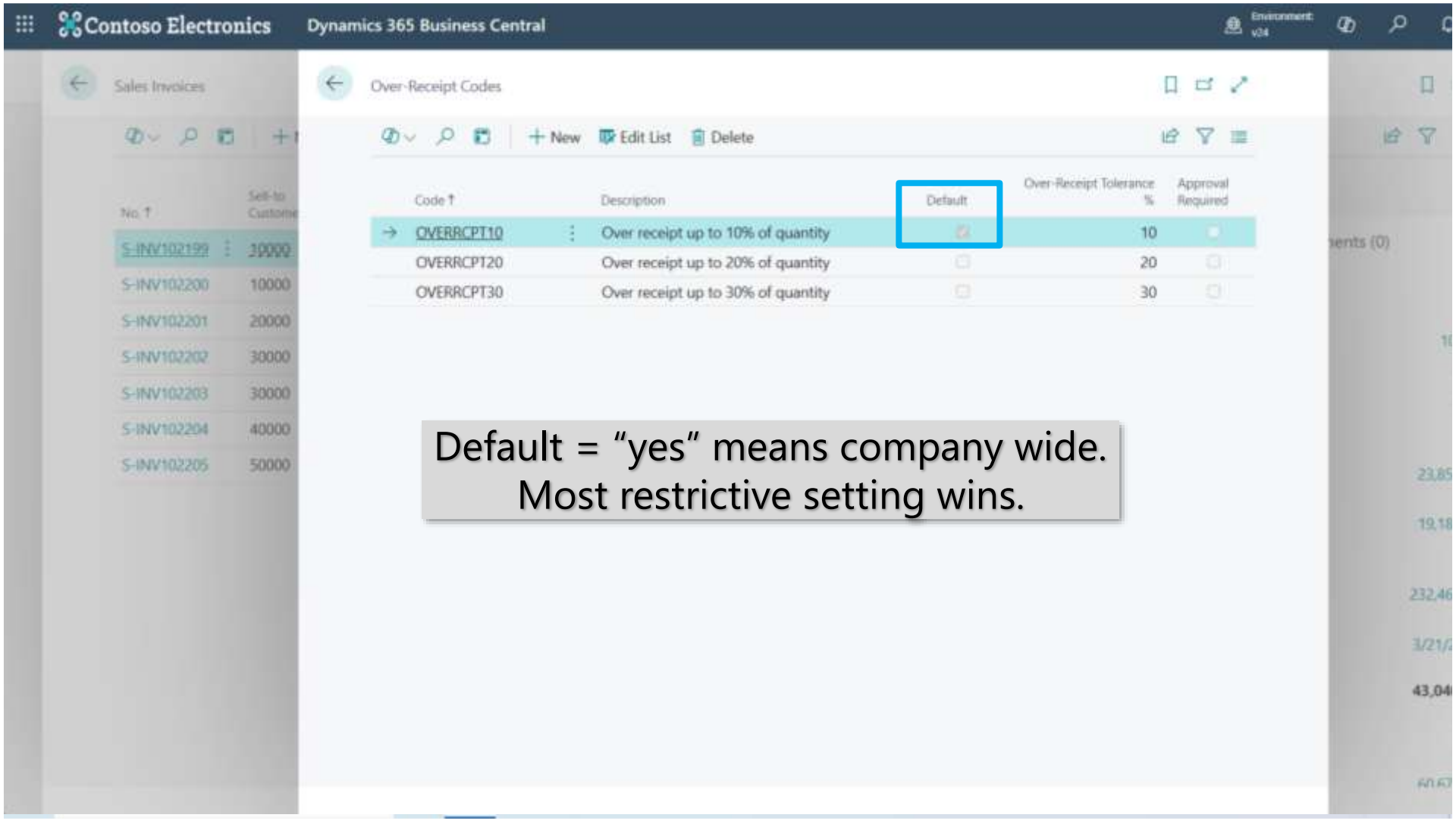
#9: Allow for over-receiving items when receiving purchases



#9: Allow for over-receiving items when receiving purchases



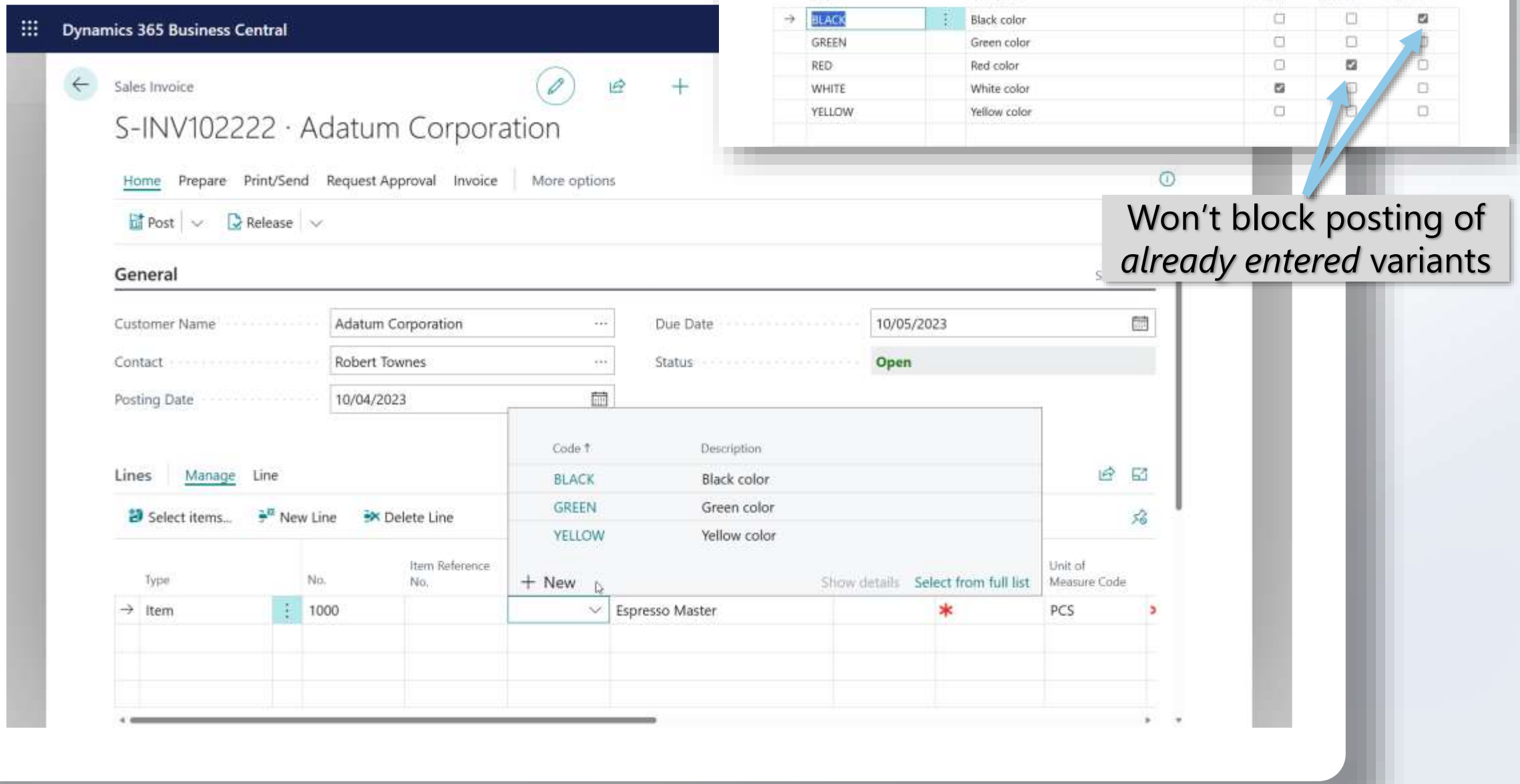
#9: Allow for over-receiving items when receiving purchases





Tip # 10

#10: Granular blocking of Item Variants

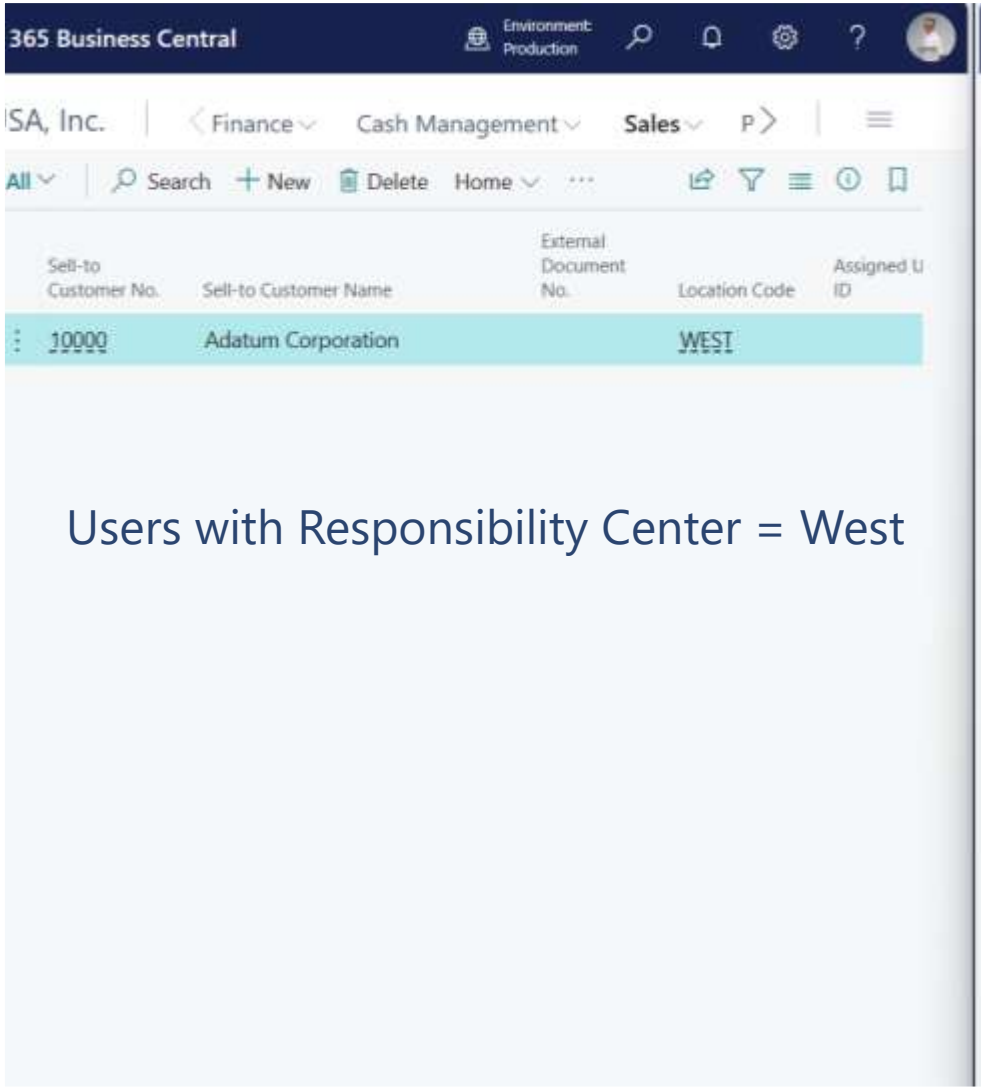


NEW



Tip # 11

#11: Use responsibilities to segregate activities, data and locations



Users with Responsibility Center = West



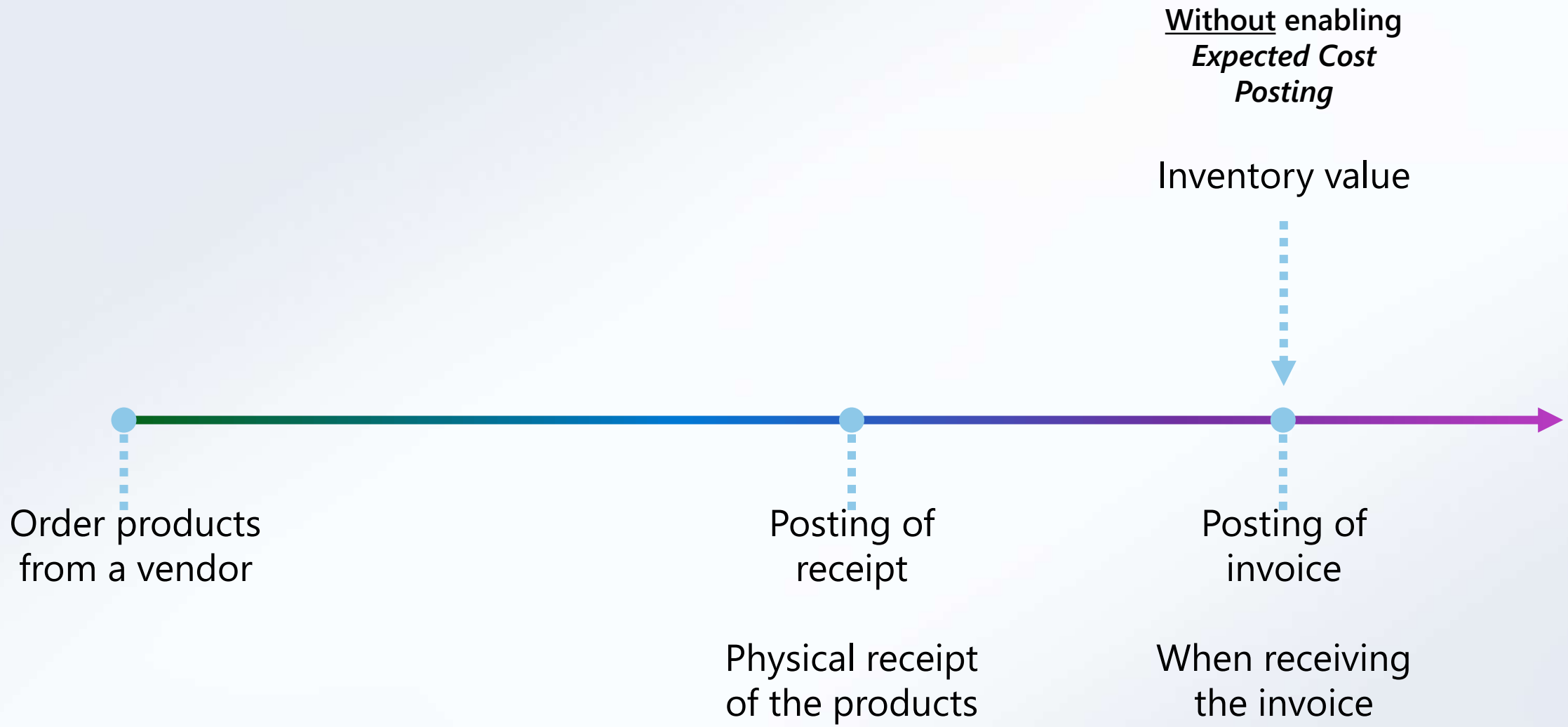
Users with no Responsibility Center



Tip # 12

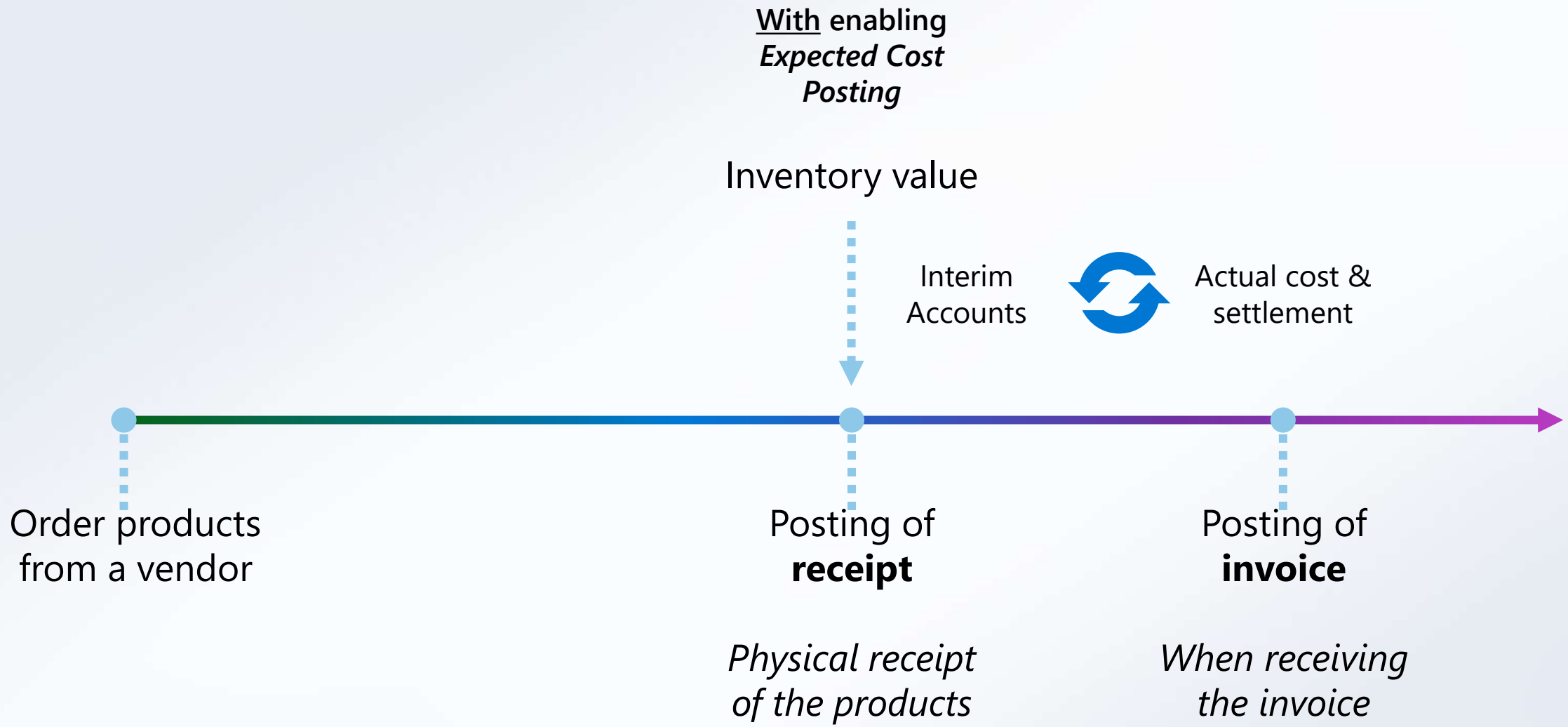
#12: Need inventory value in near-real-time?

Get closer to real-time with expected cost



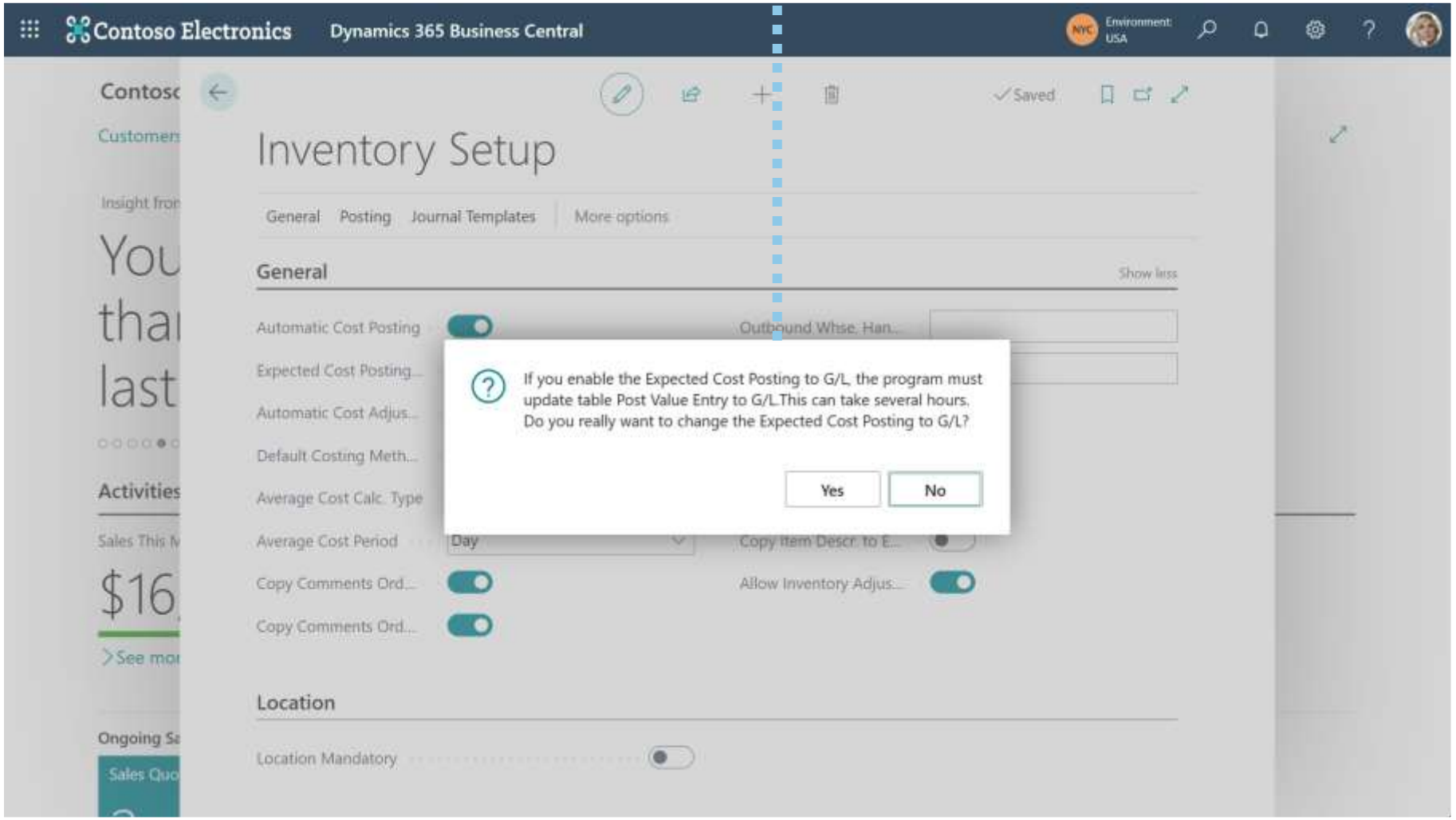
#12: Need inventory value in near-real-time?

Get closer to real-time with expected cost



#12: Need inventory value in near-real-time?

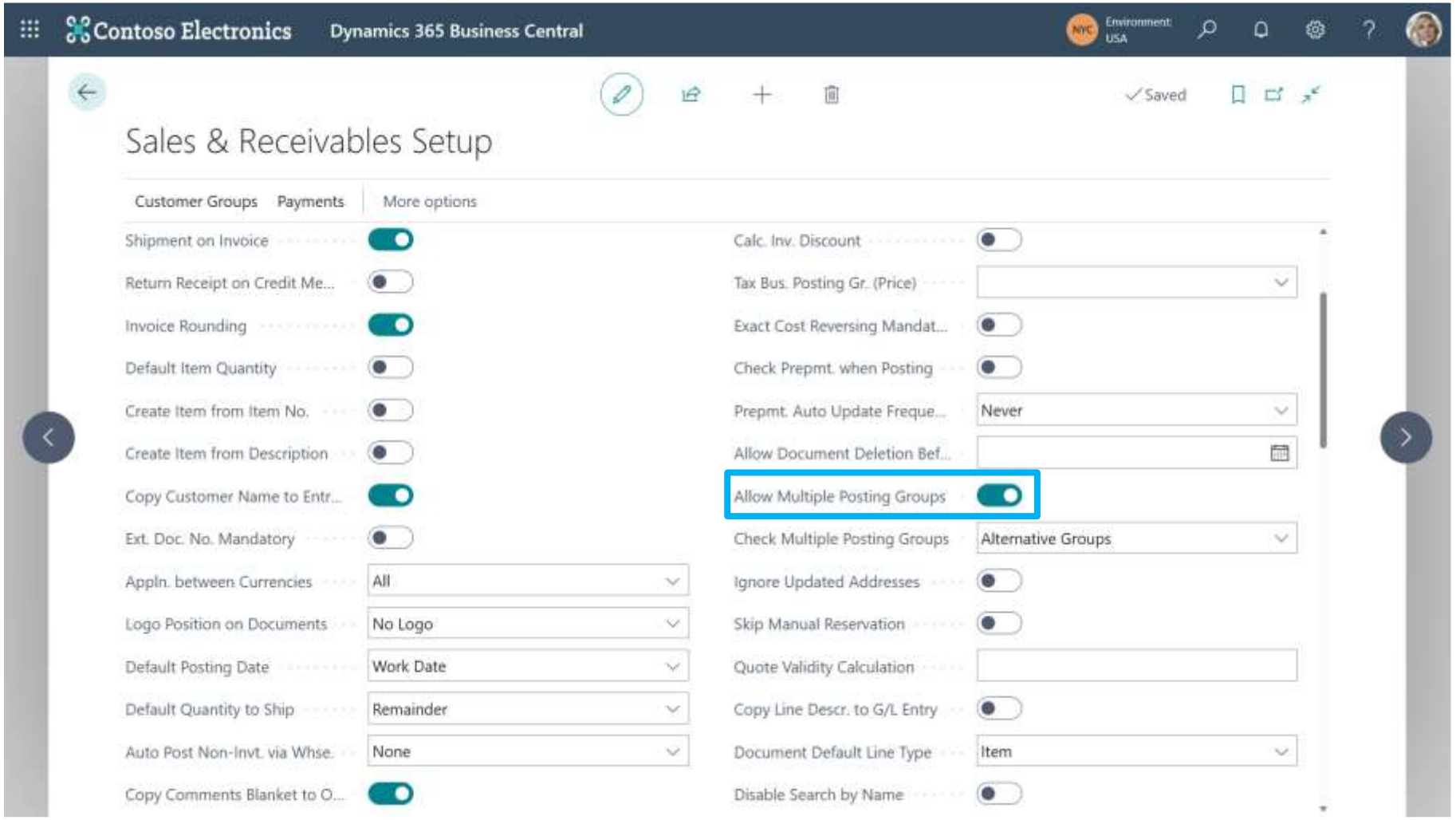
Before you enable it, read the docs! Design Details: Expected Cost Posting



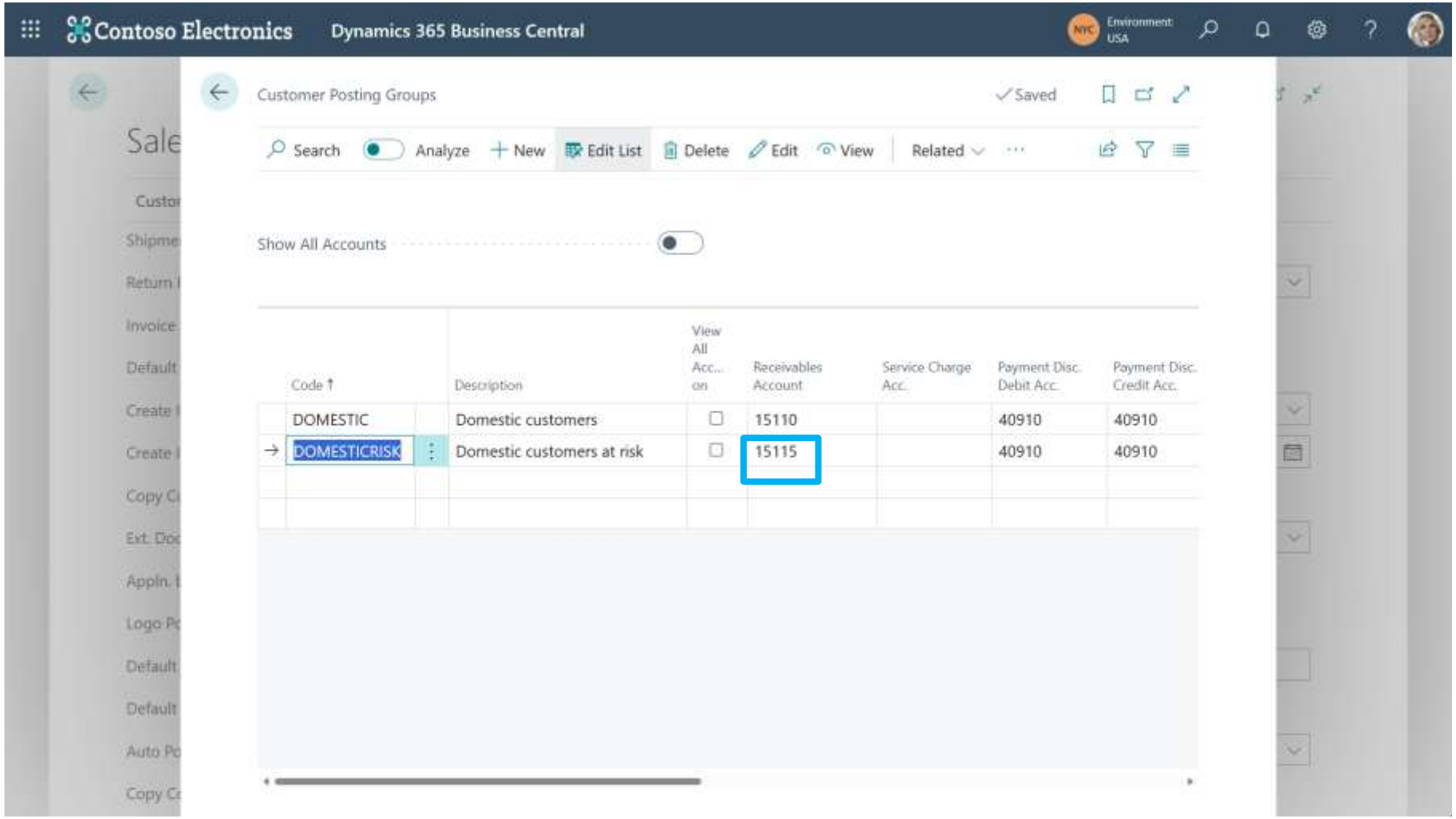


Tip # 13

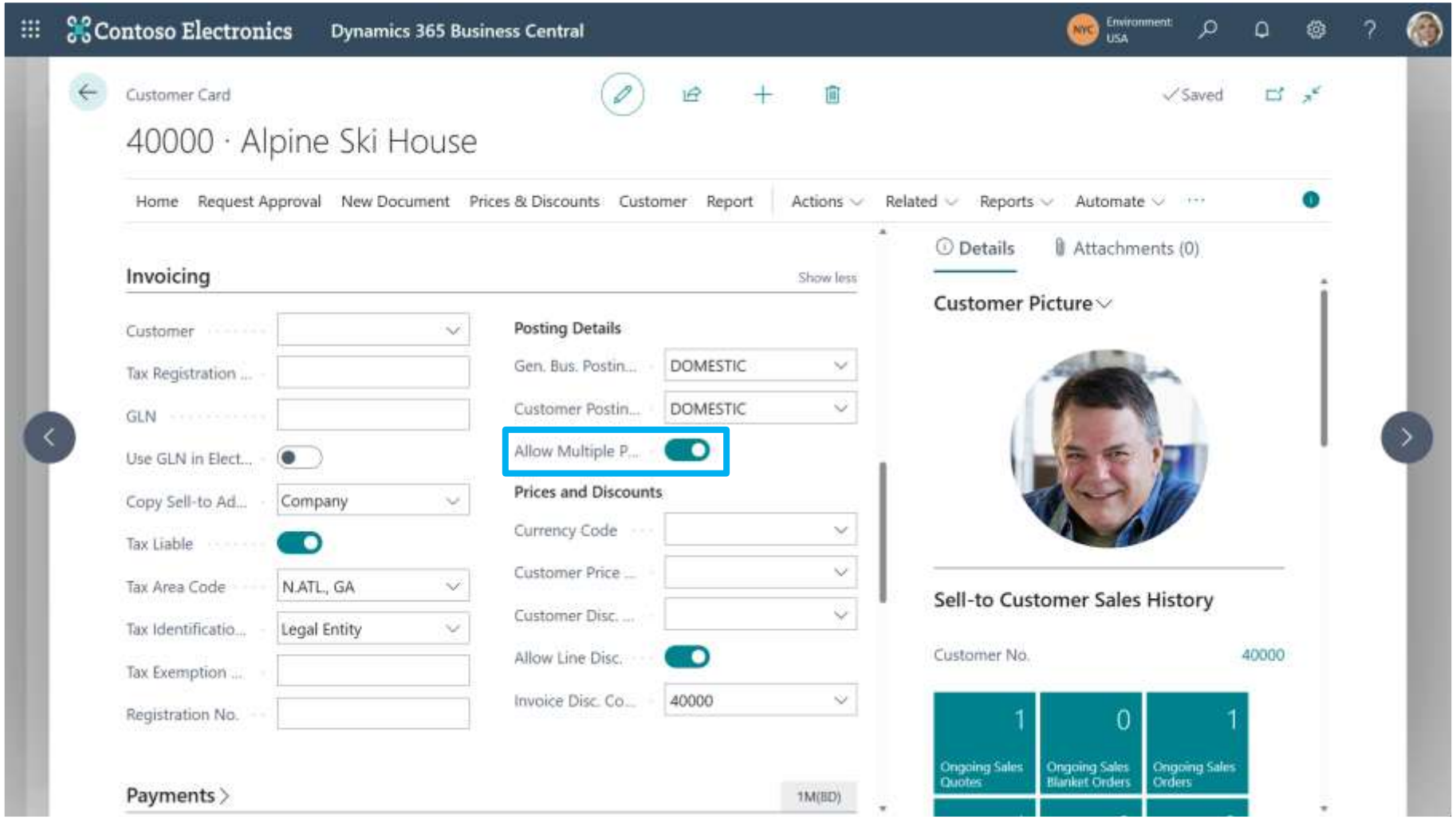
#13: Substitute posting groups on-the-fly



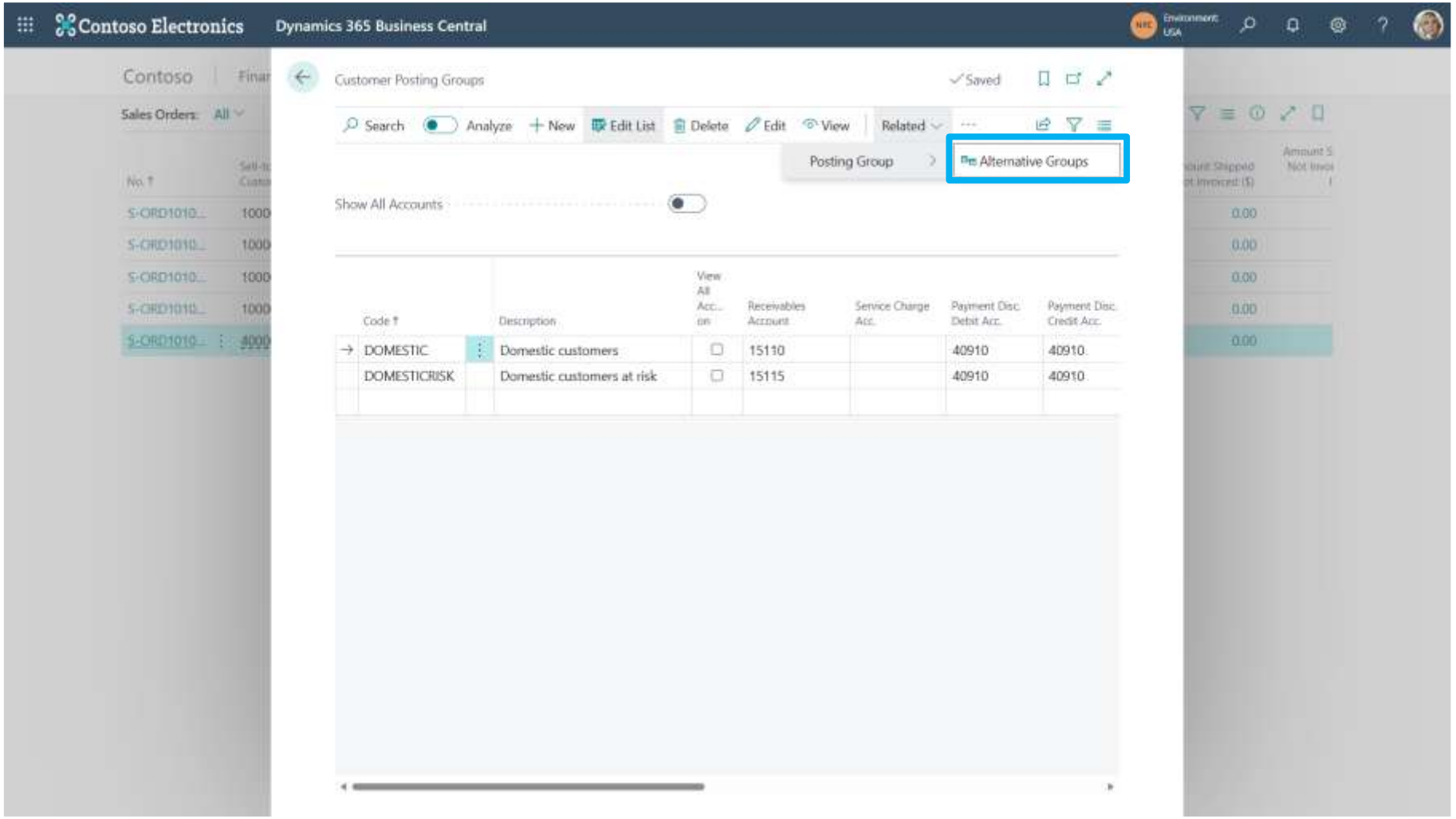
#13: Substitute posting groups on-the-fly



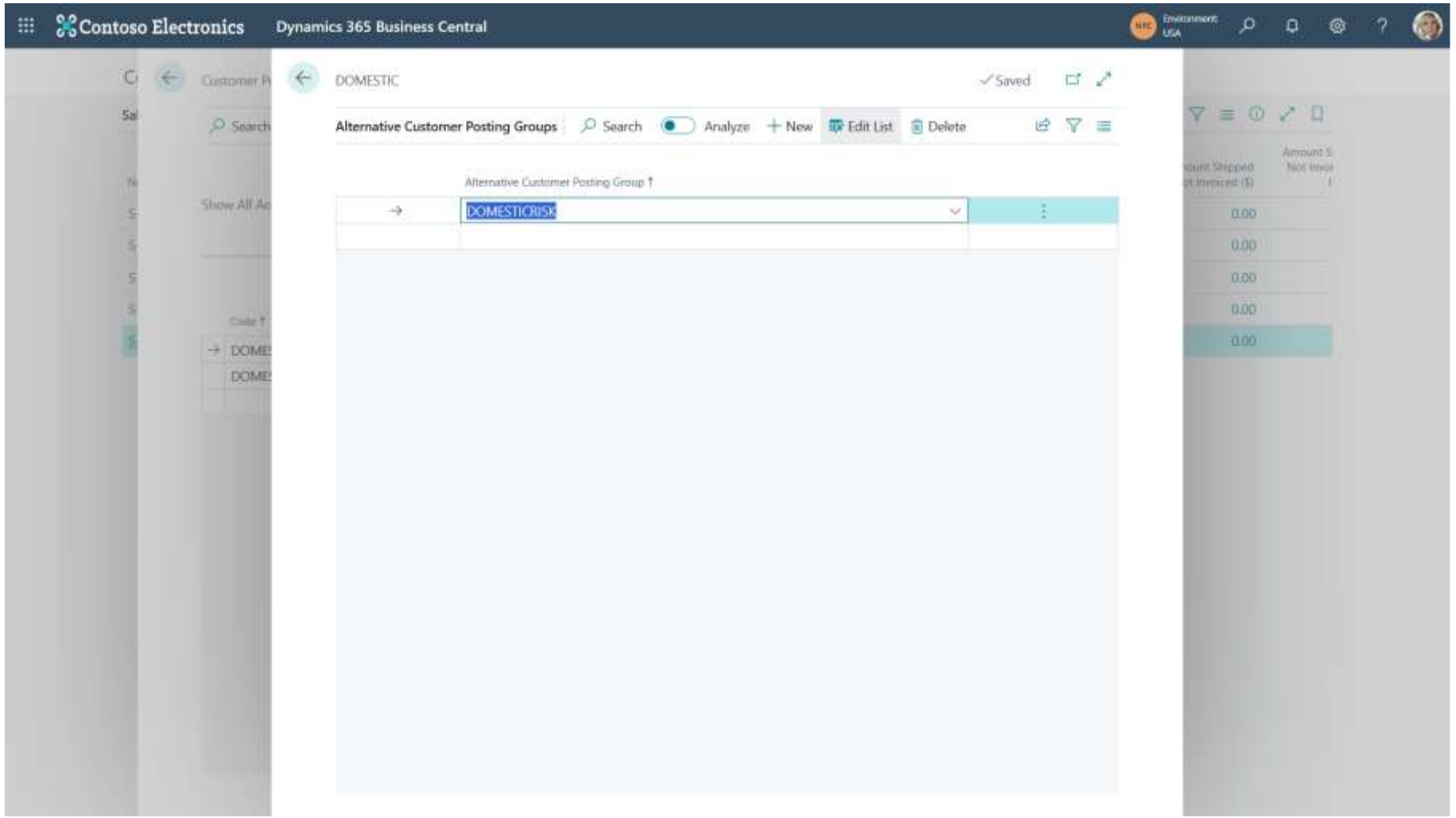
#13: Substitute posting groups on-the-fly



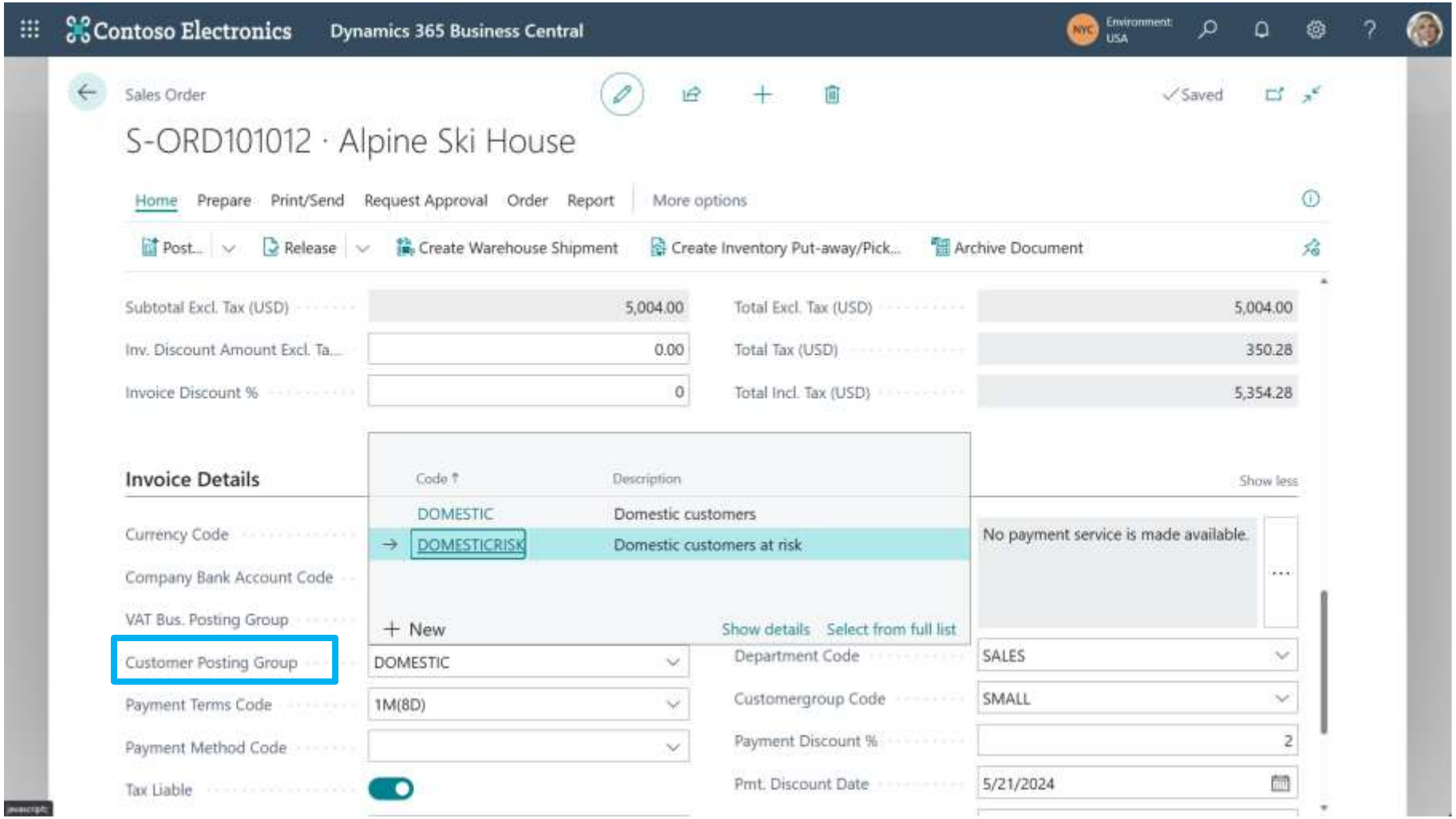
#13: Substitute posting groups on-the-fly



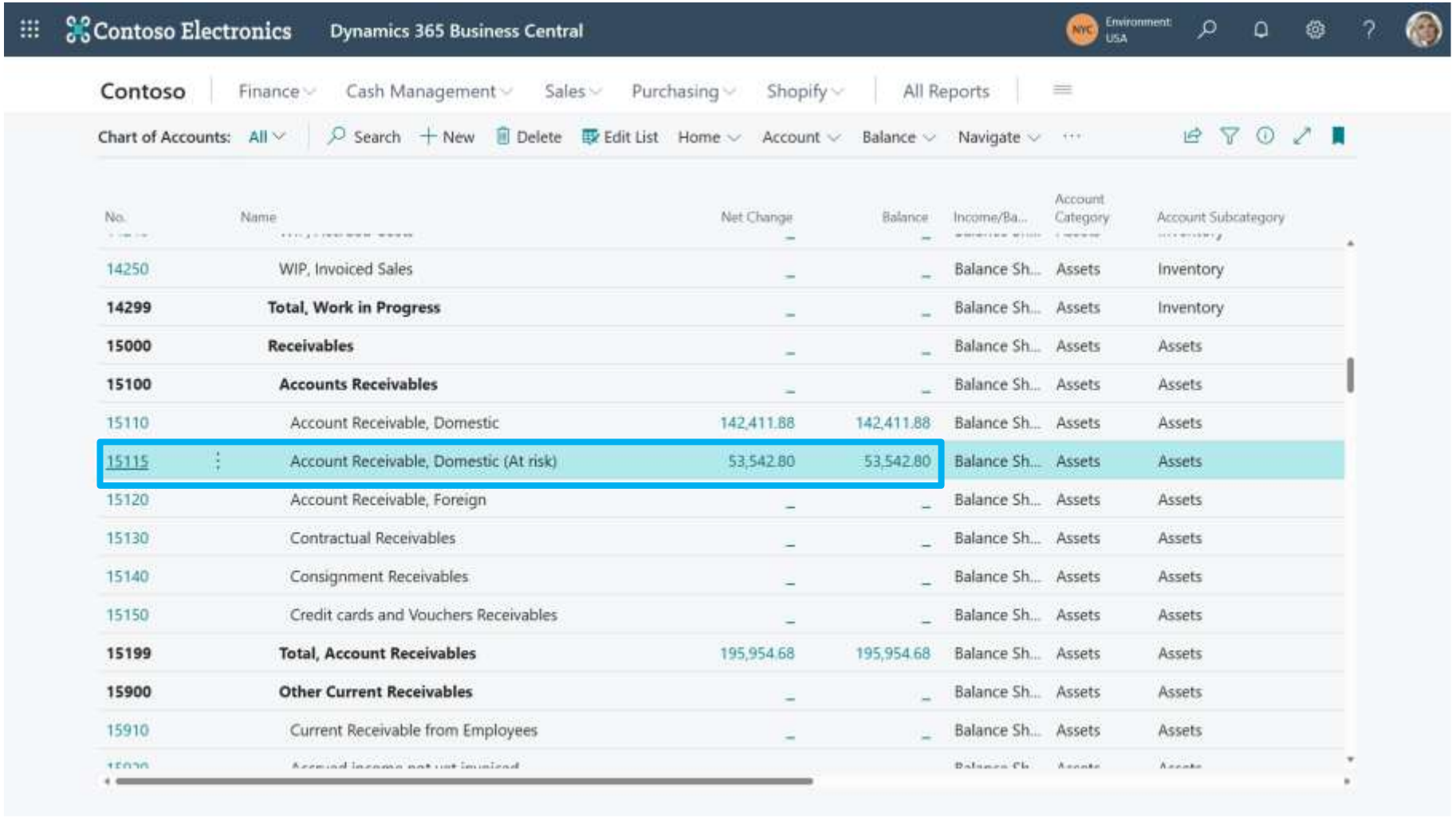
#13: Substitute posting groups on-the-fly



#13: Substitute posting groups on-the-fly

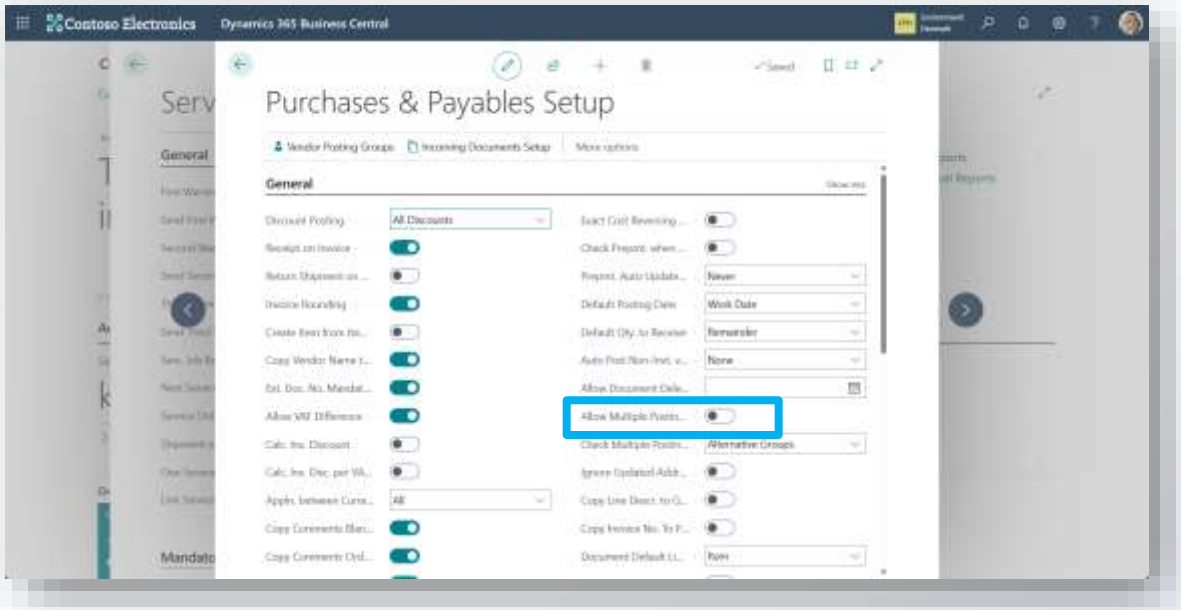


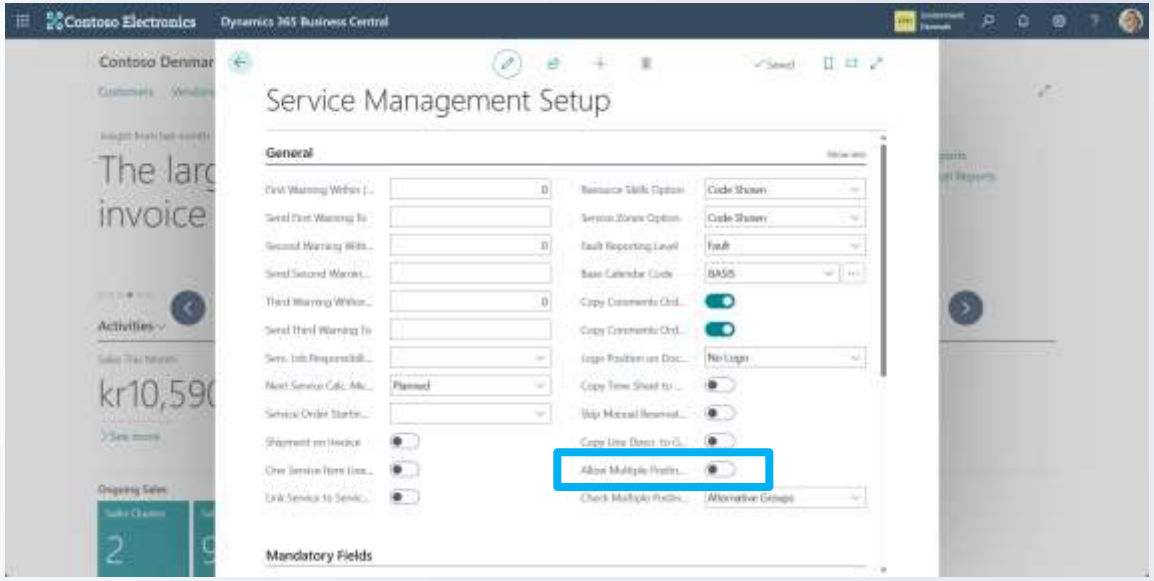
#13: Substitute posting groups on-the-fly



#13: Substitute posting groups on-the-fly

Also possible in
Purchase and Service

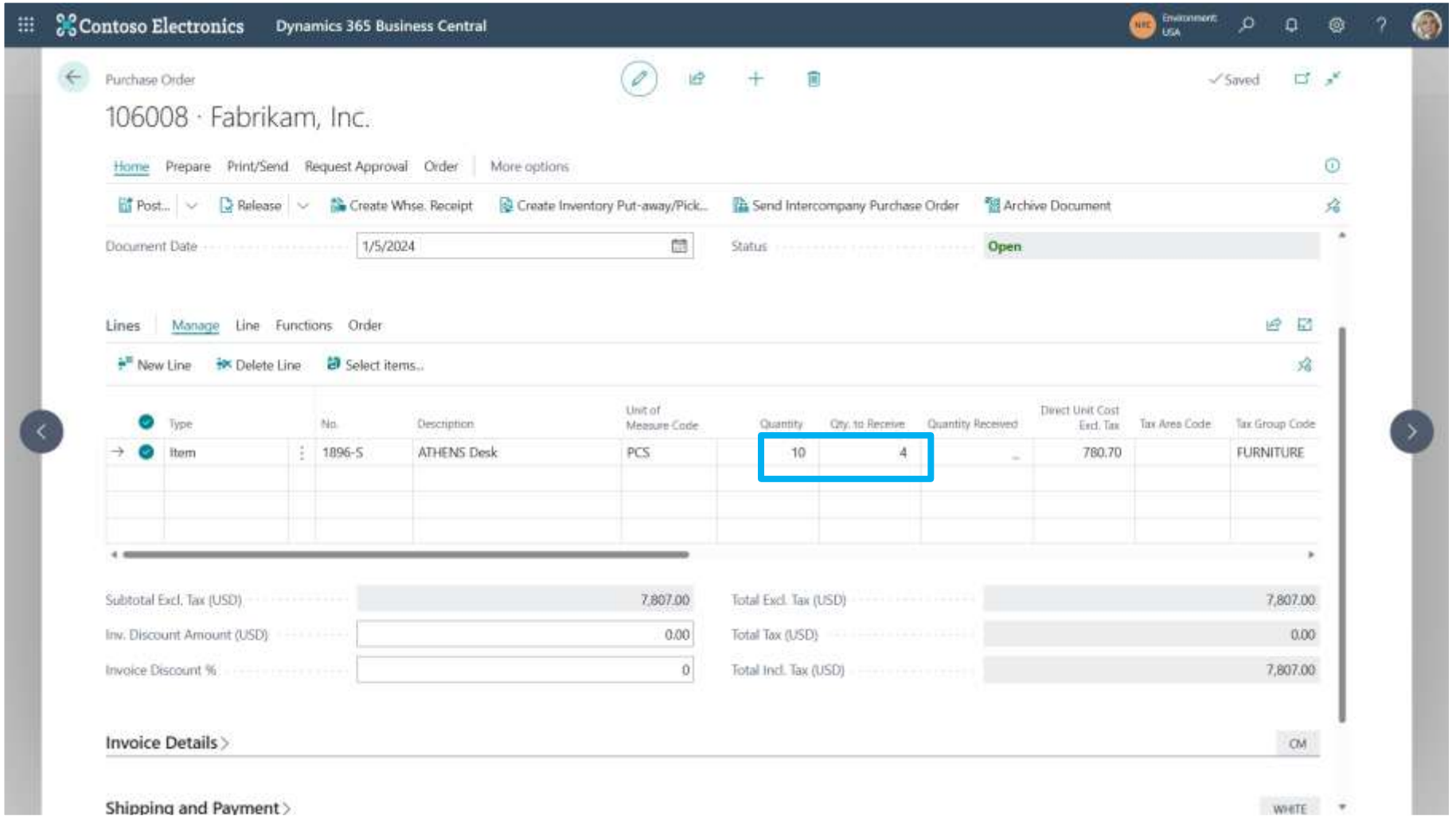




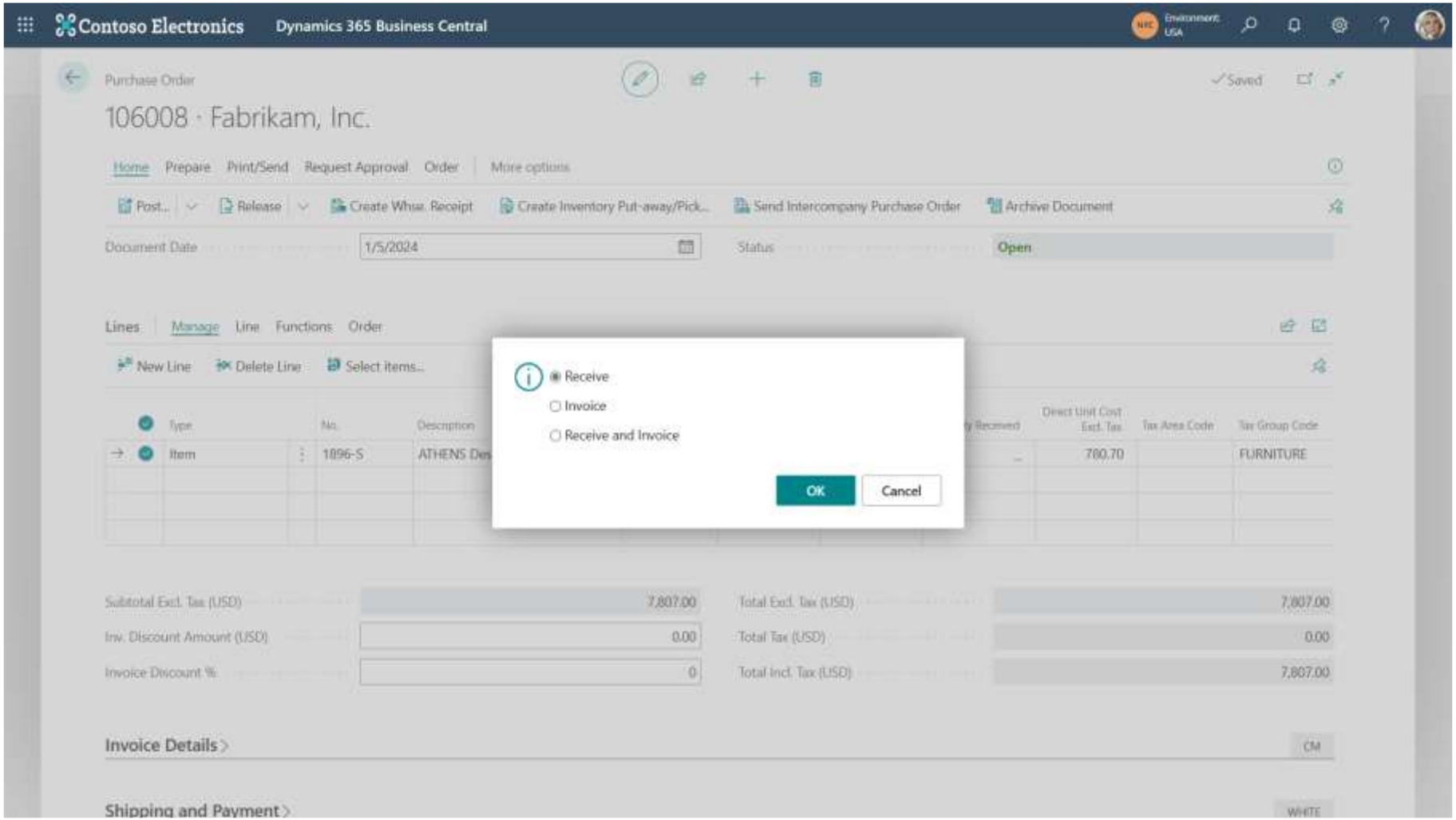


Tip # 14

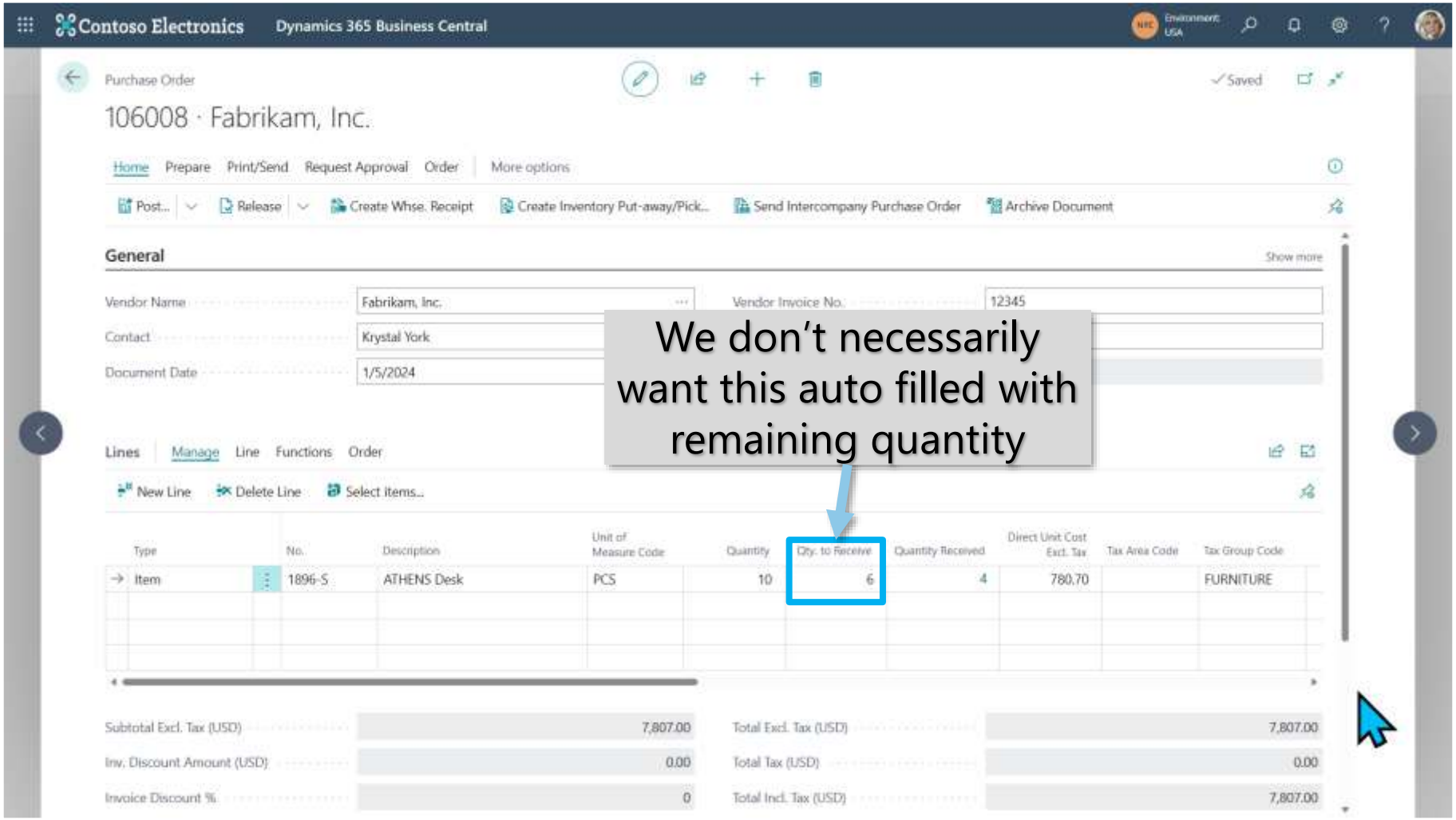
#14: Remainder Quantity on purchase orders



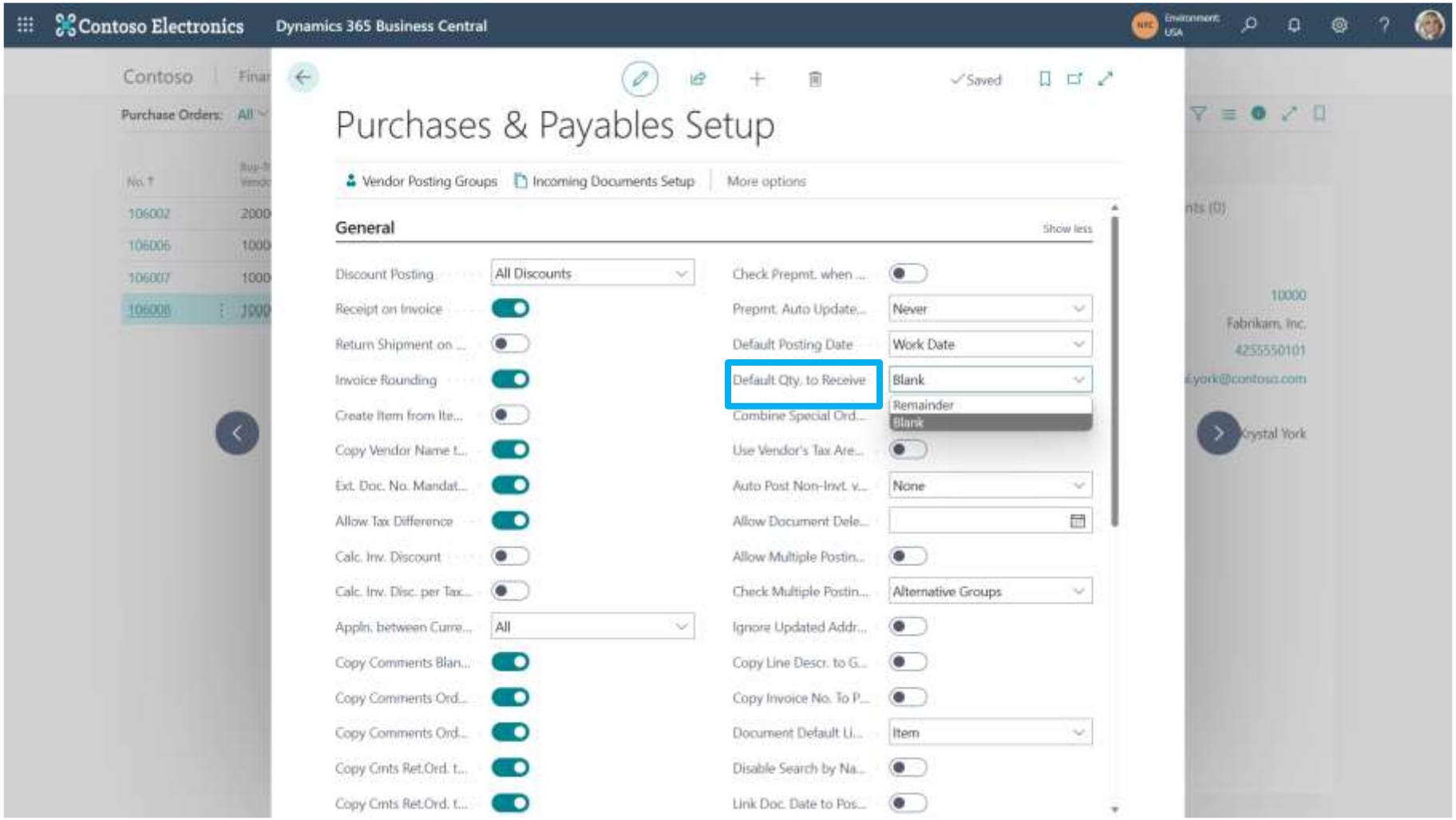
#14: Remainder Quantity on purchase orders



#14: Remainder Quantity on purchase orders



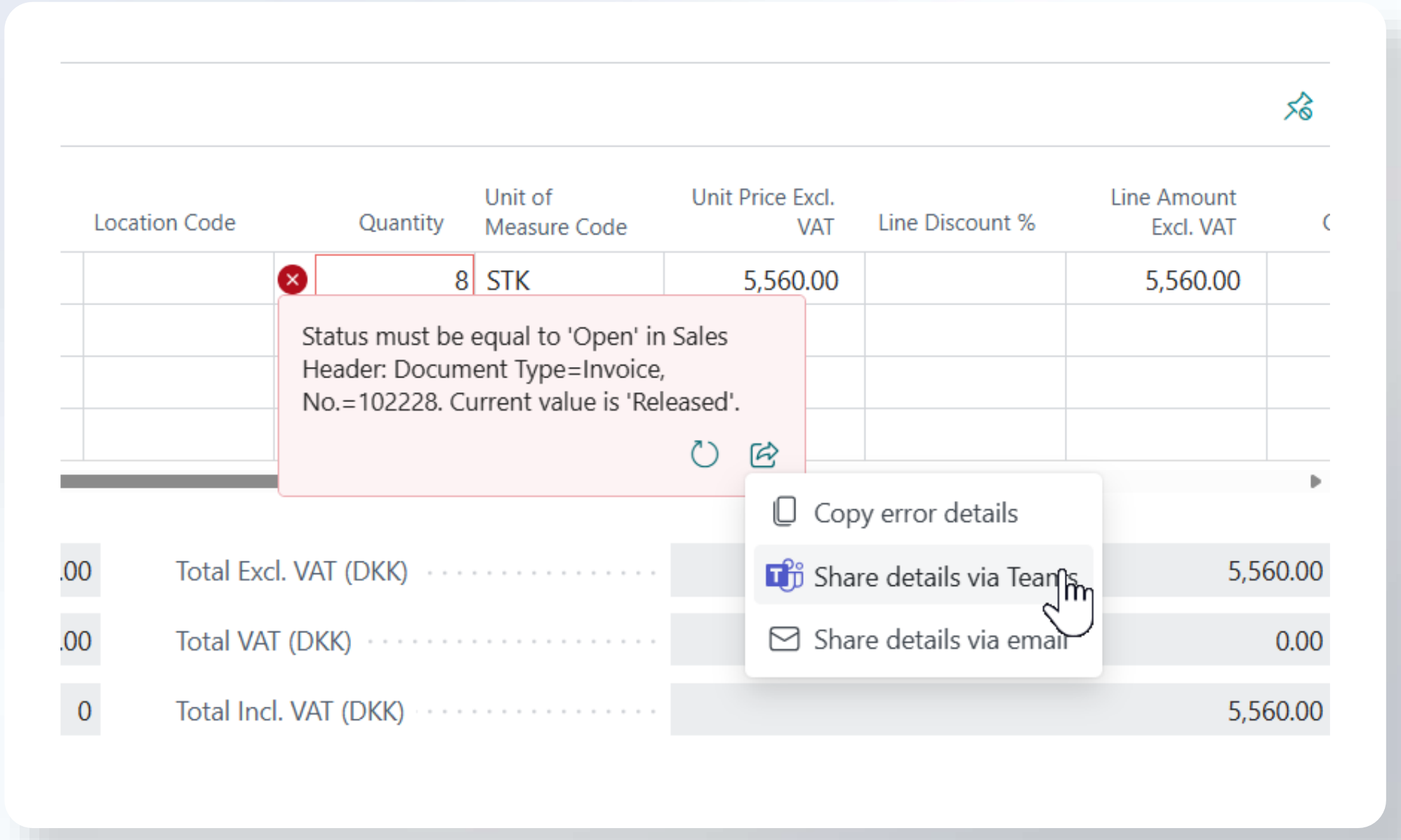
#14: Remainder Quantity on purchase orders



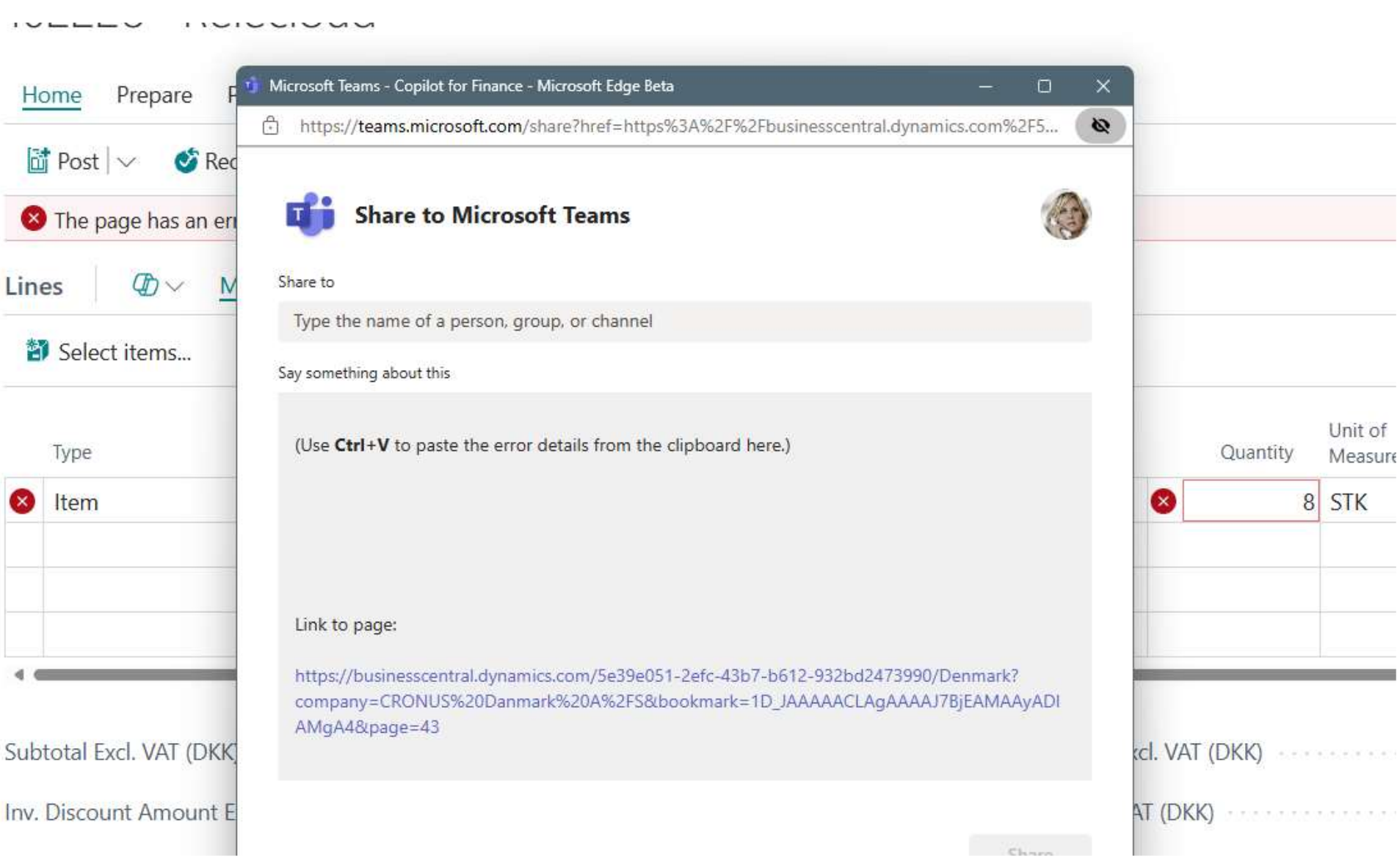


Tip # 15

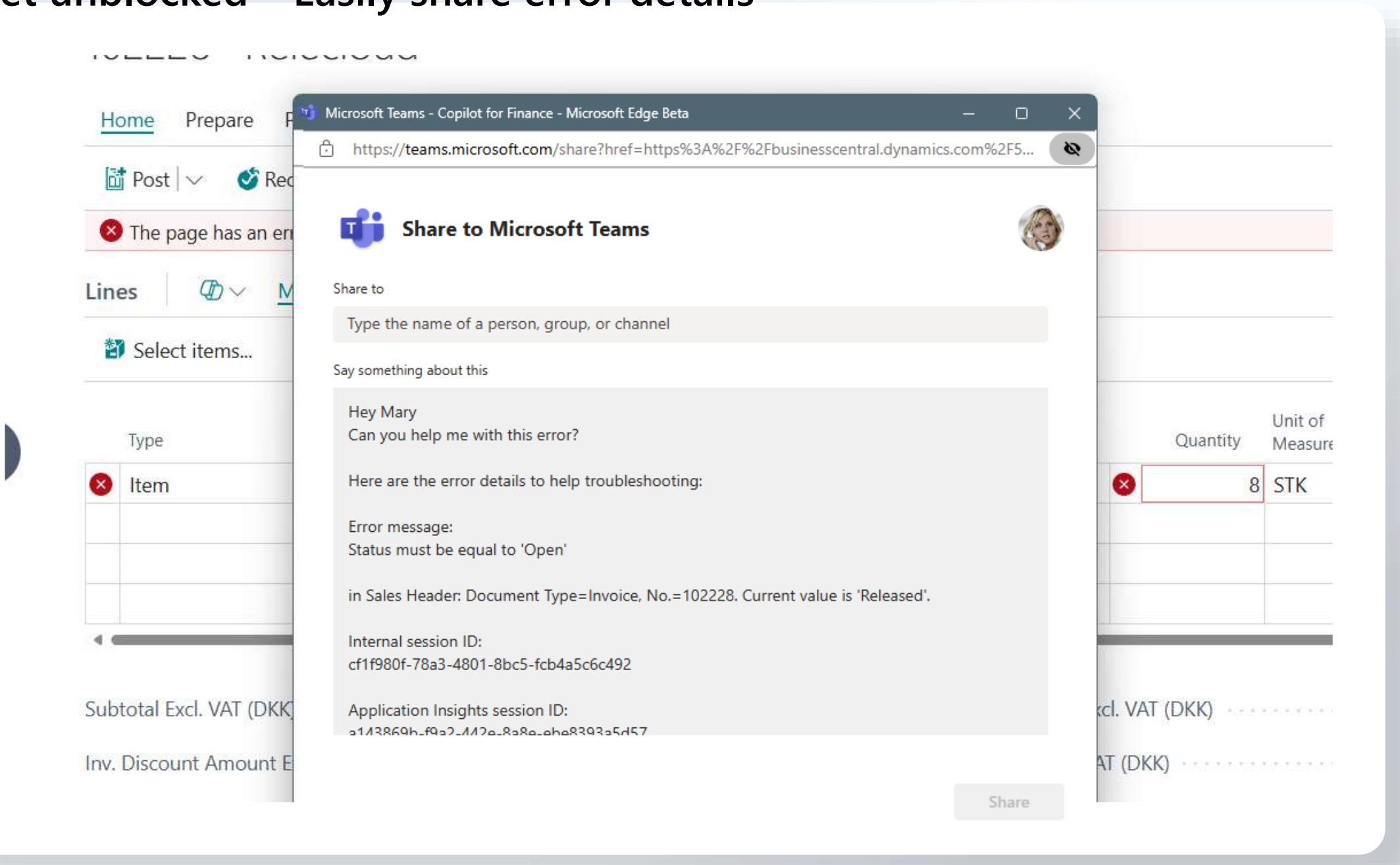
#15: Get unblocked – Easily share error details



#15: Get unblocked – Easily share error details



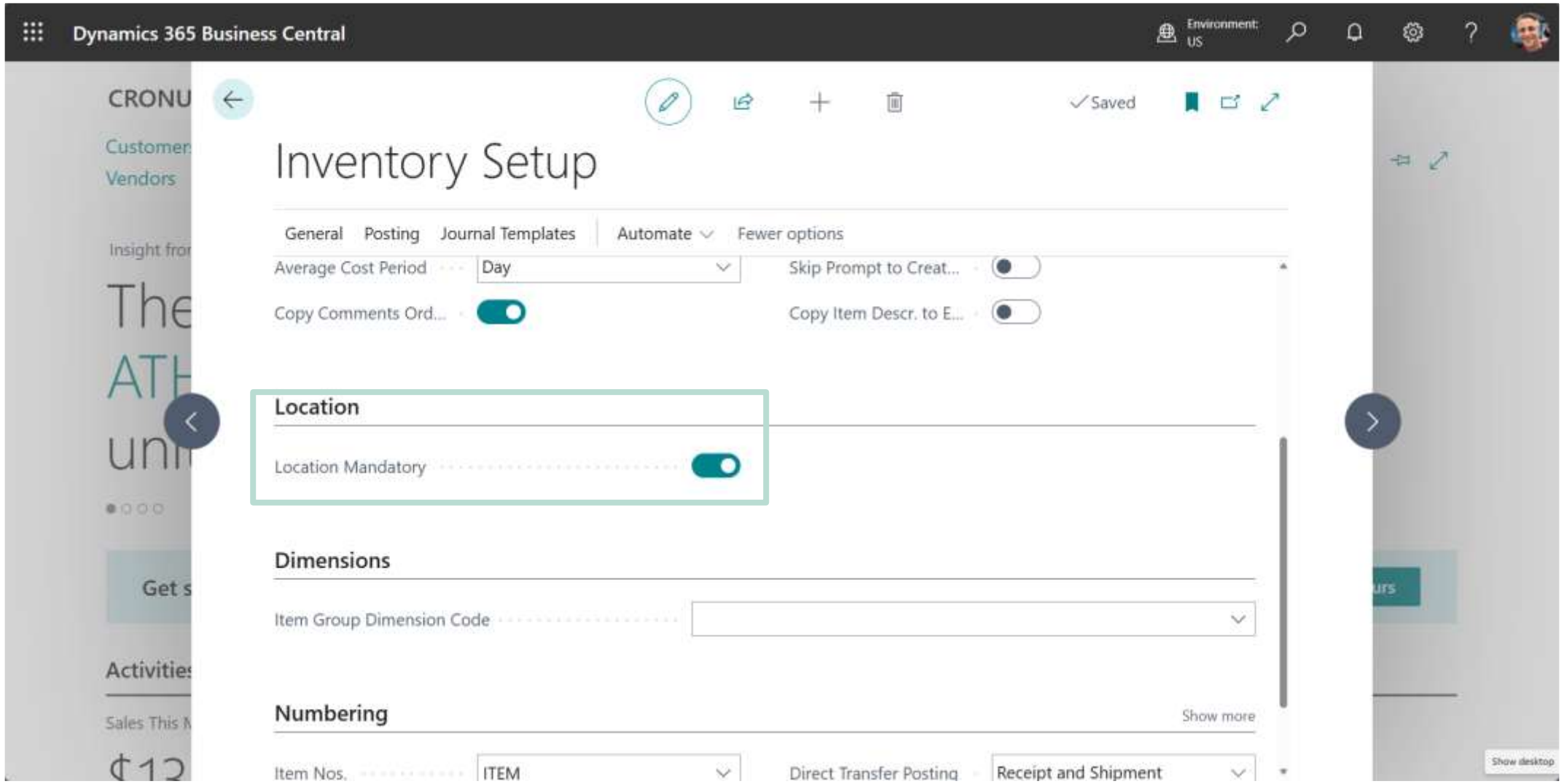
#15: Get unblocked – Easily share error details



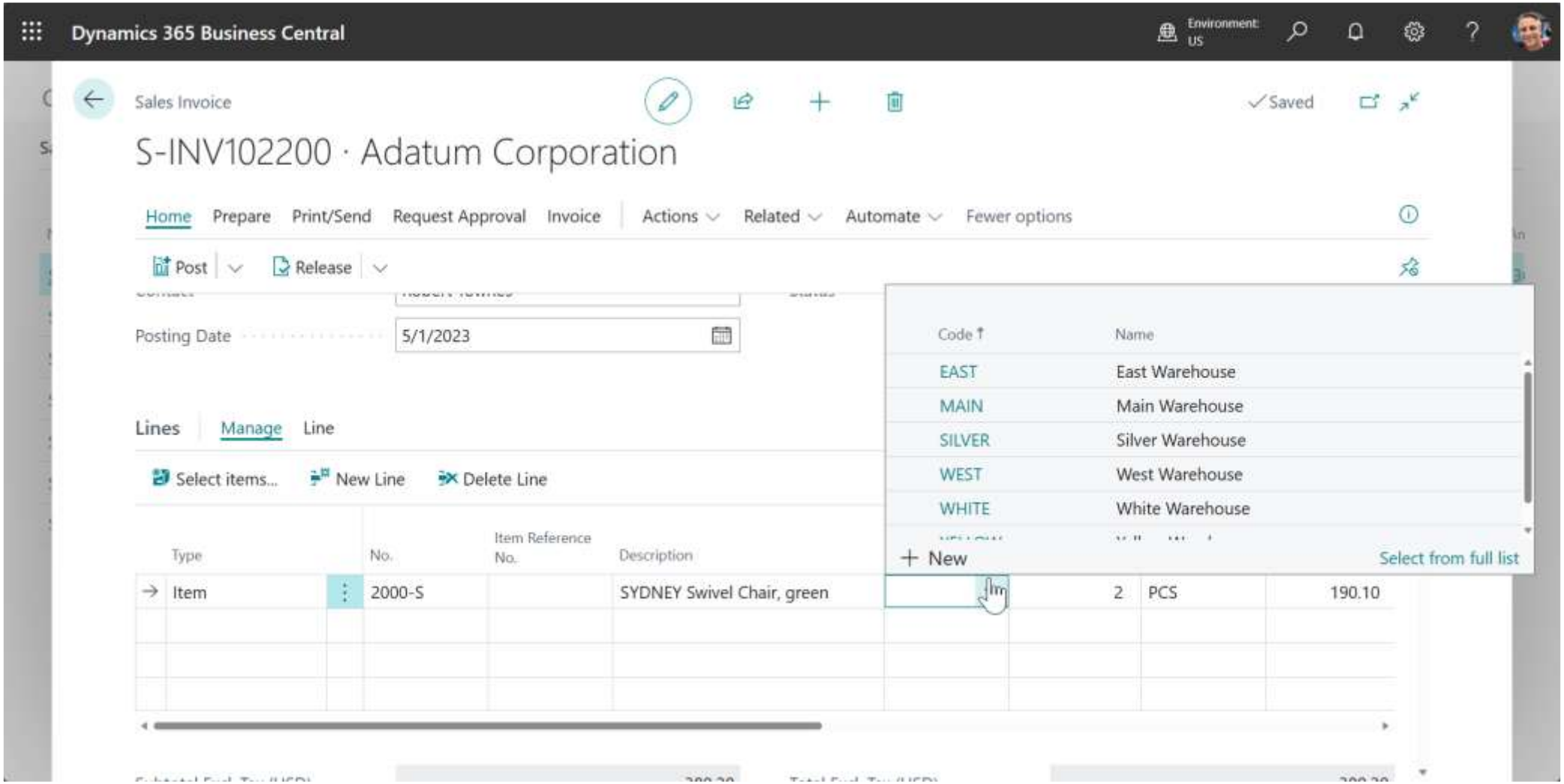


Tip # 16

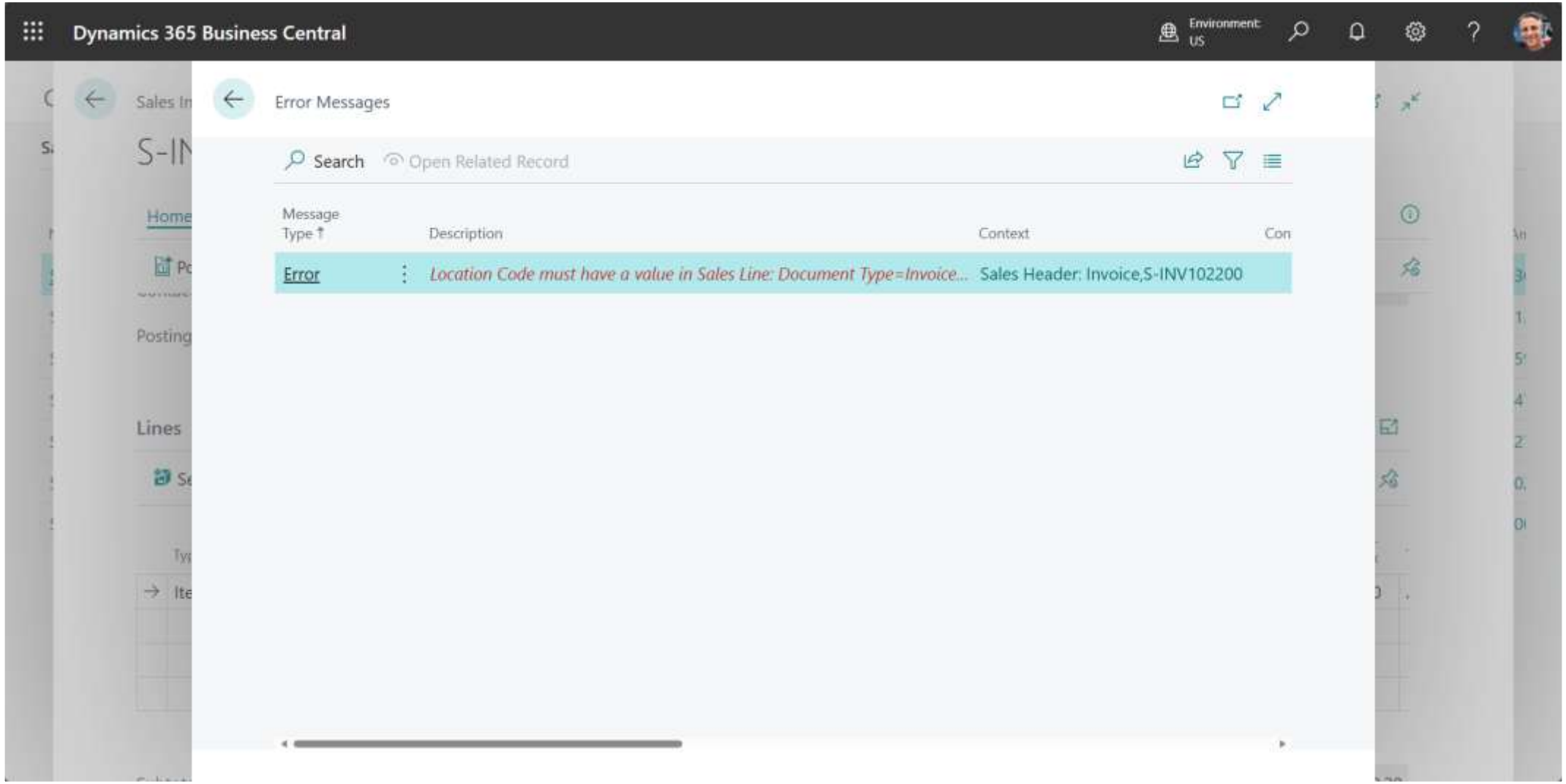
#16: Don’t allow posting without Location Code



#16: Don’t allow posting without Location Code



#16: Don’t allow posting without Location Code



NEW

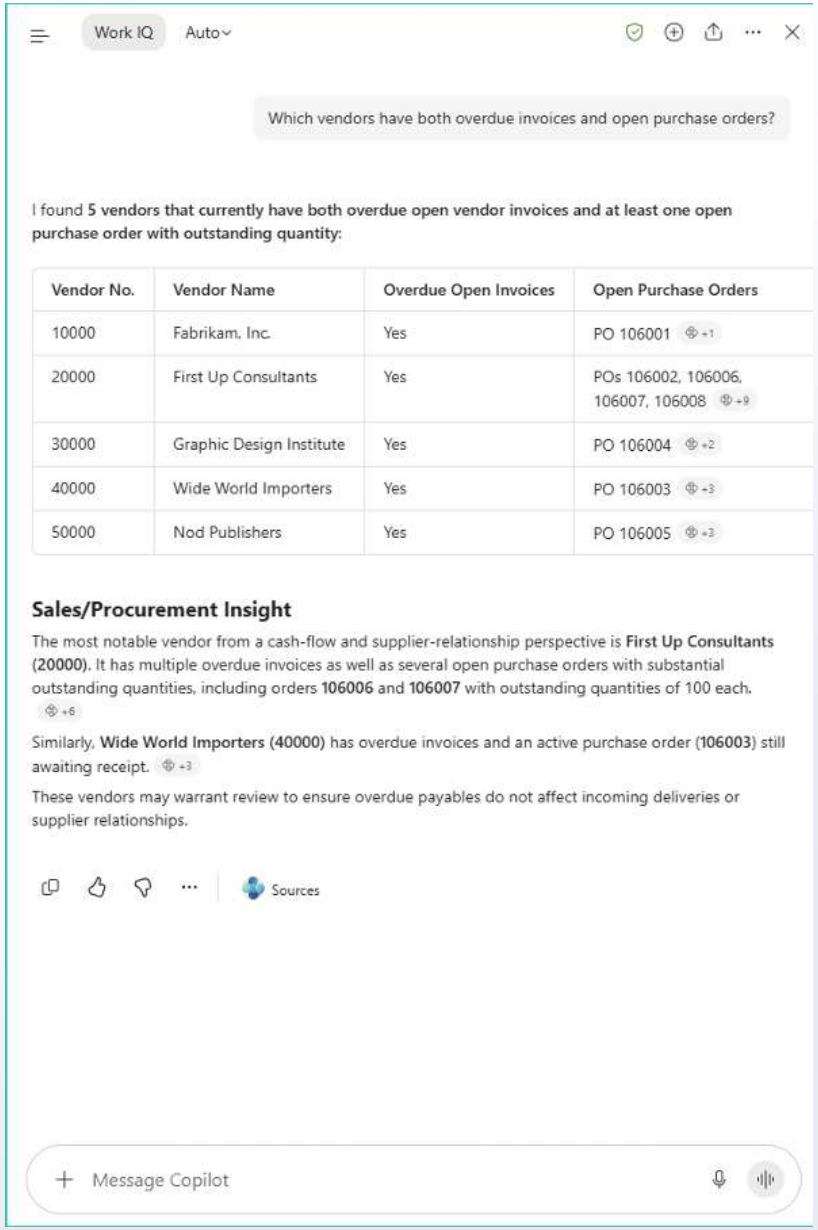


Tip # 17

#17: Copilot – Find insights about your data

Try something like:

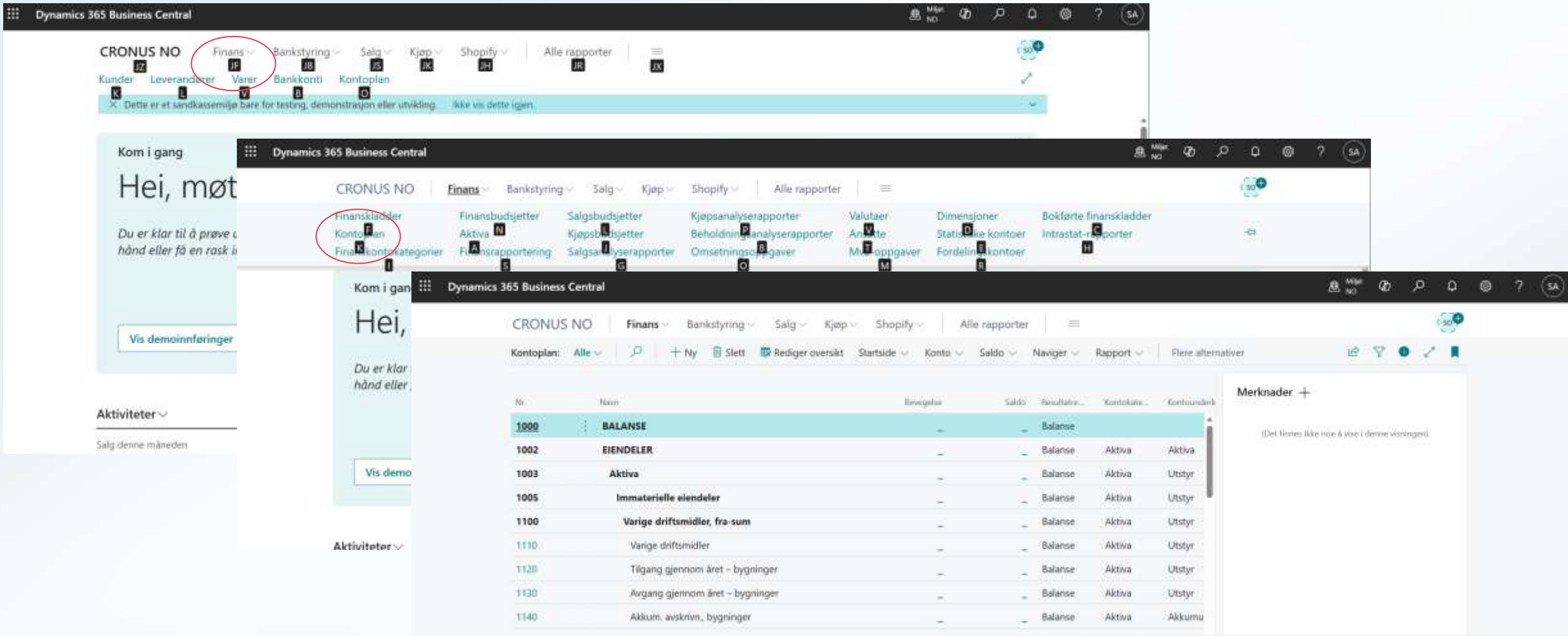
- “What are my top 5 customers by revenue? Please visualize the result as a vertical bar chart”
- “Compare average invoice amount by vendor this quarter vs last.”
- “Which vendors have both overdue invoices and open purchase orders?”





Tip # 18

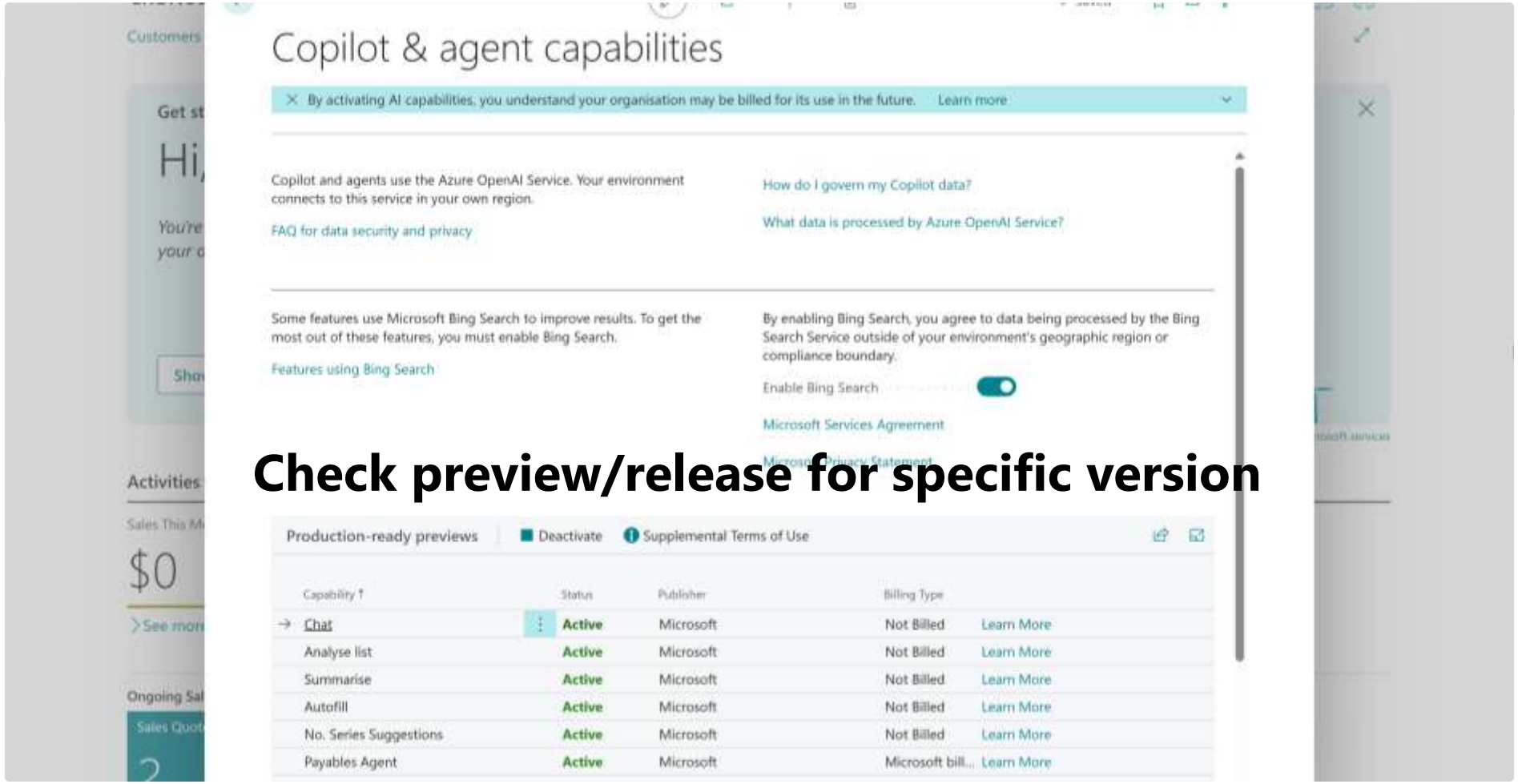
#18: Use ALT key to navigate





Tip # 19

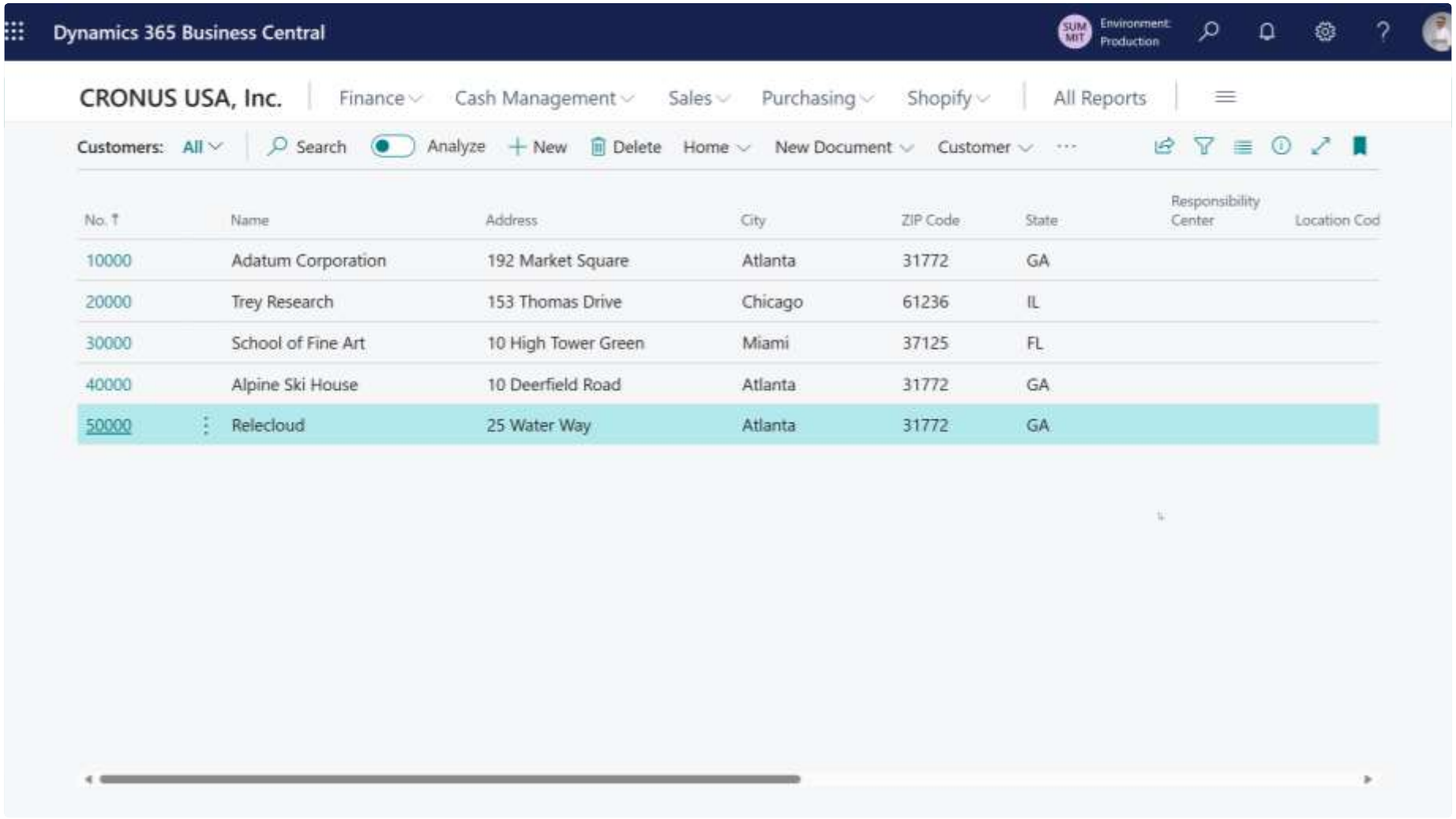
#19: Manage Copilot features



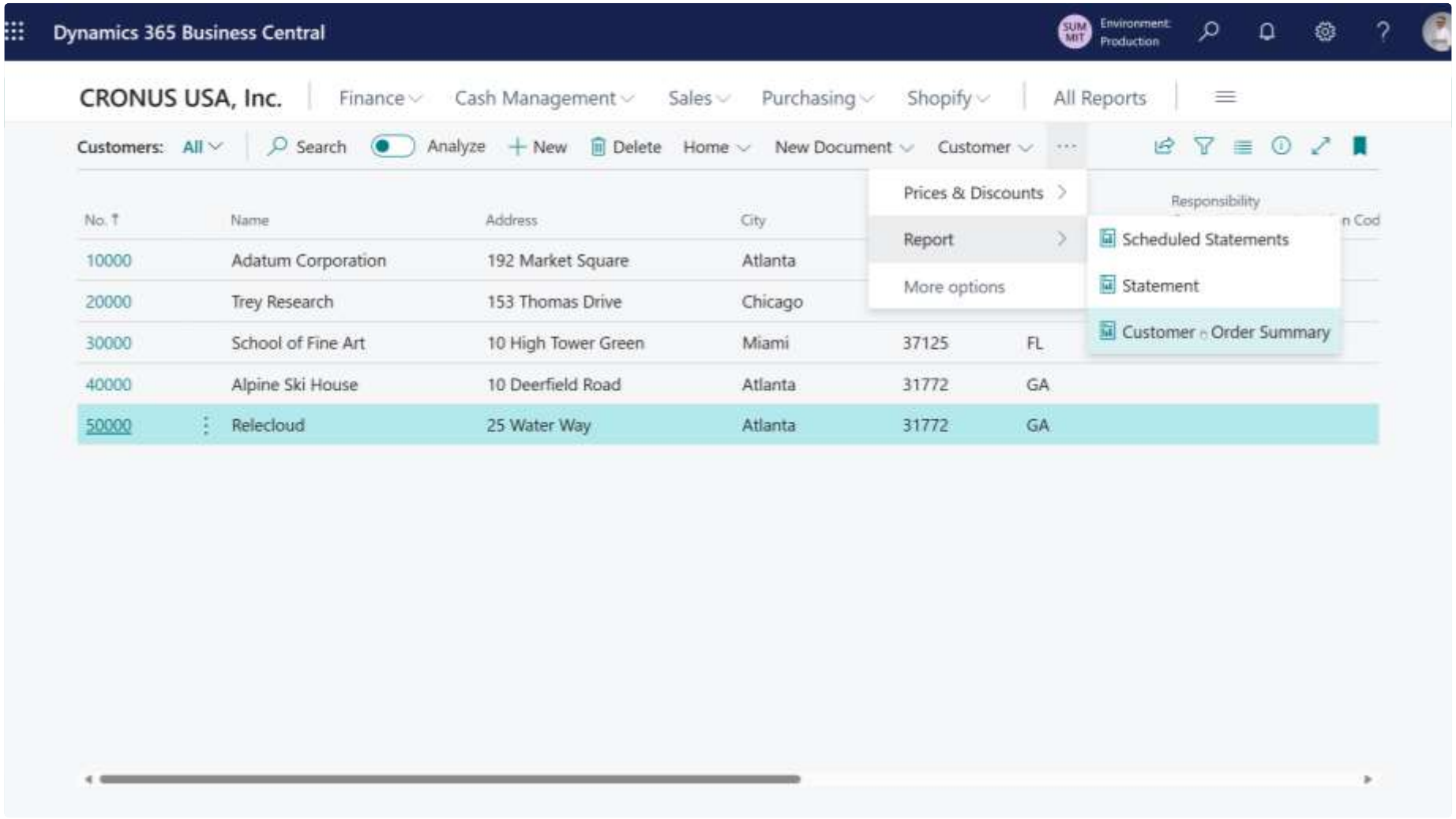


Tip # 20

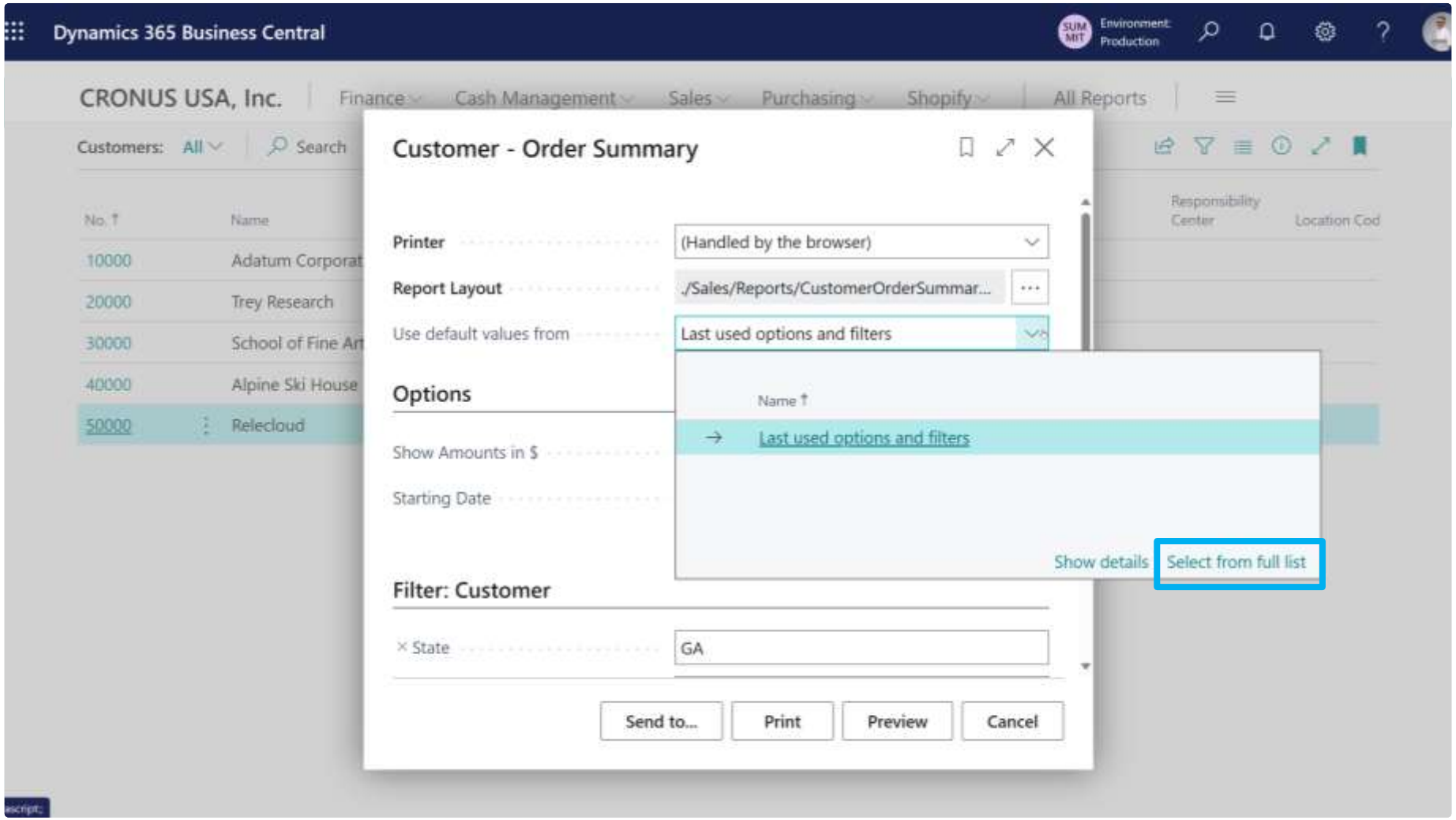
#20: Share report settings across the company



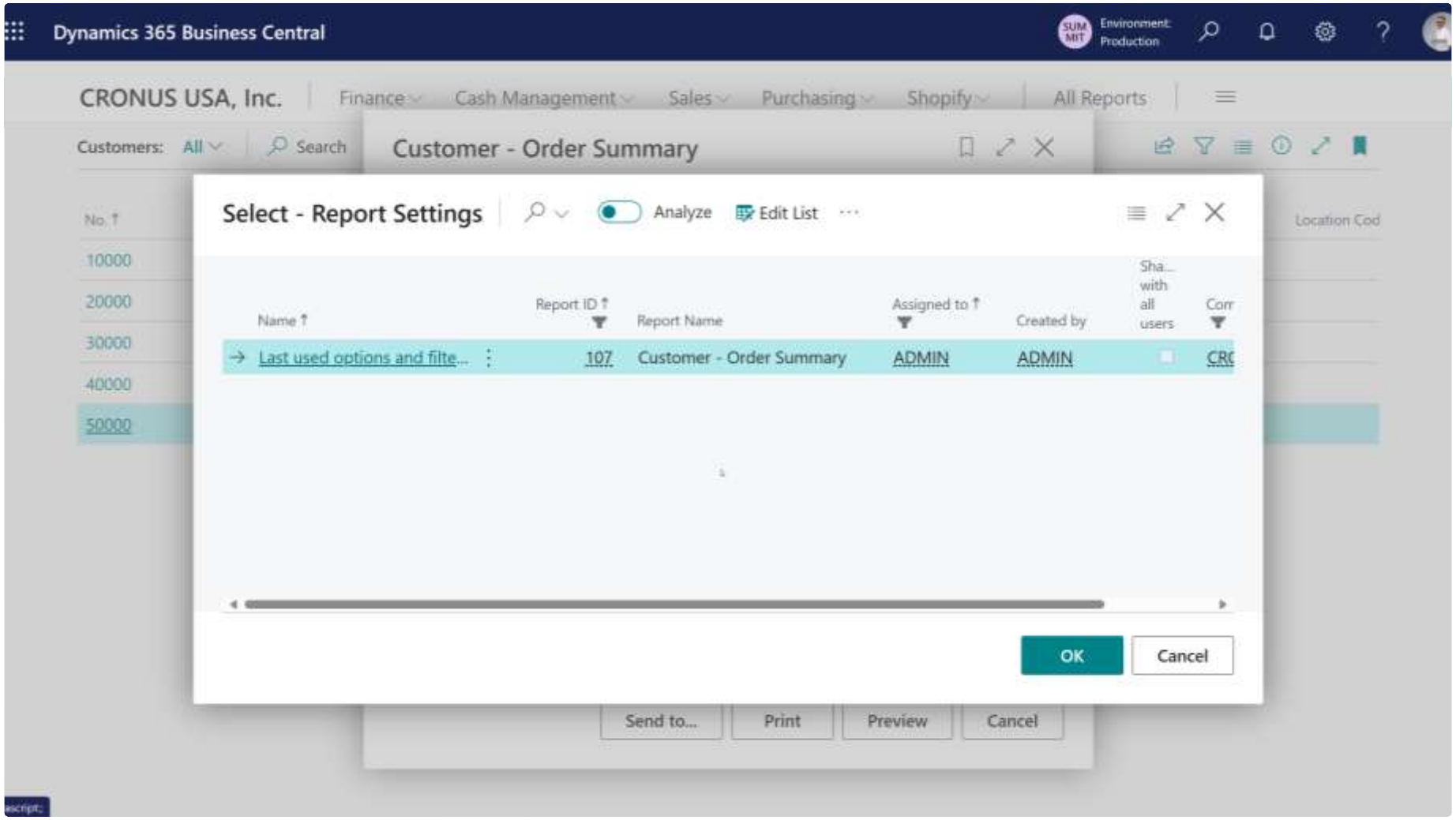
#20: Share report settings across the company



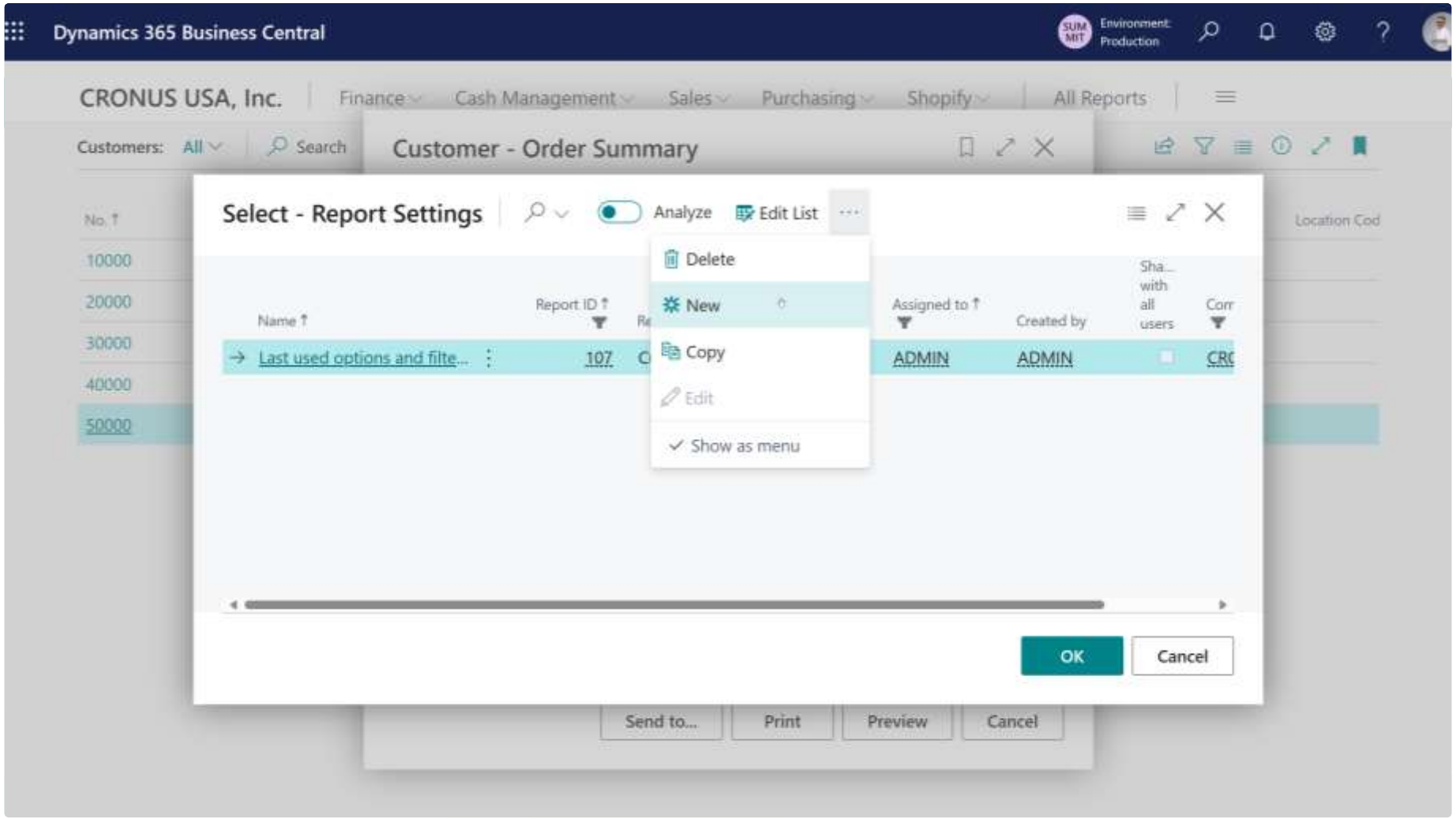
#20: Share report settings across the company



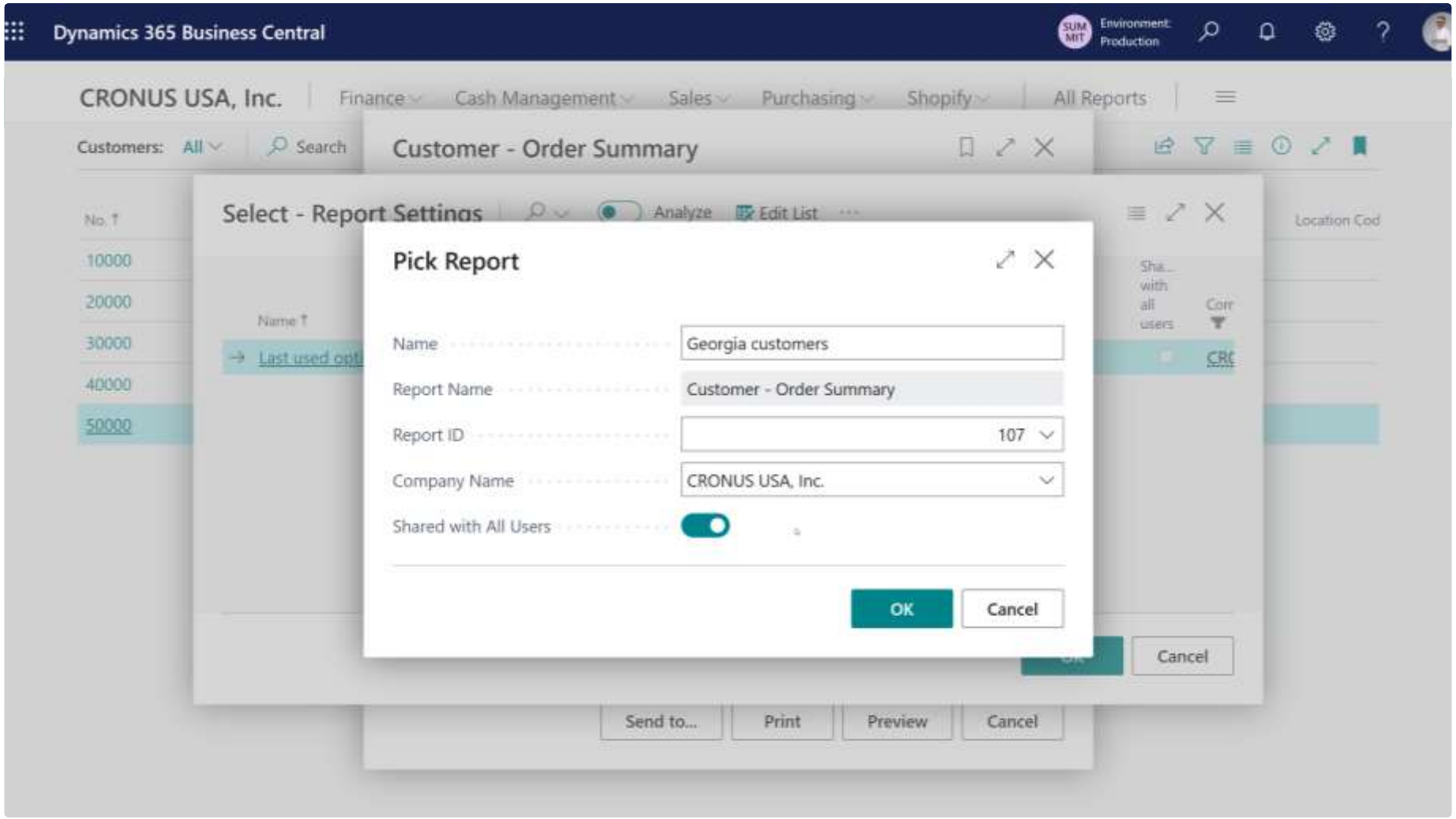
#20: Share report settings across the company



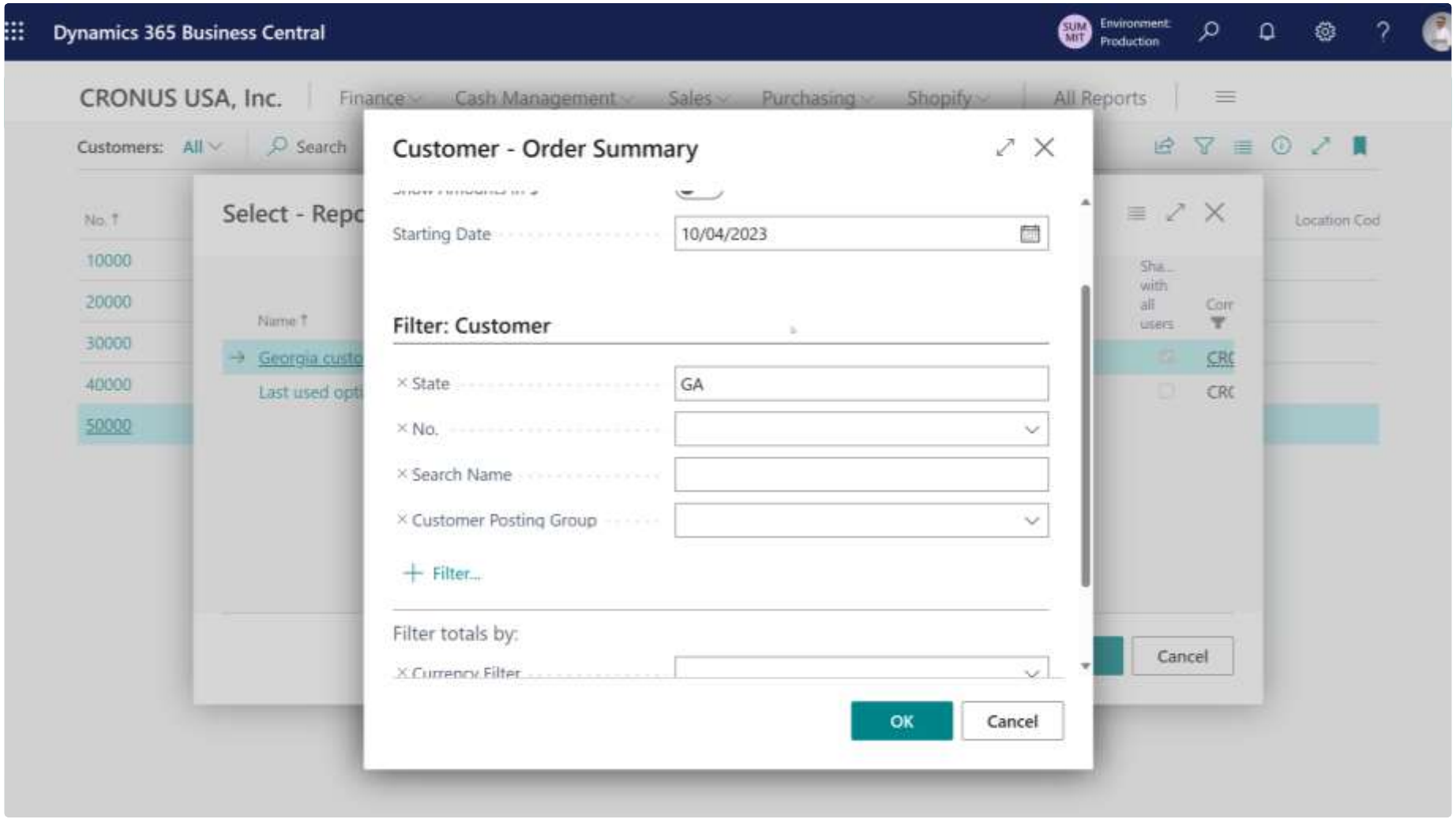
#20: Share report settings across the company



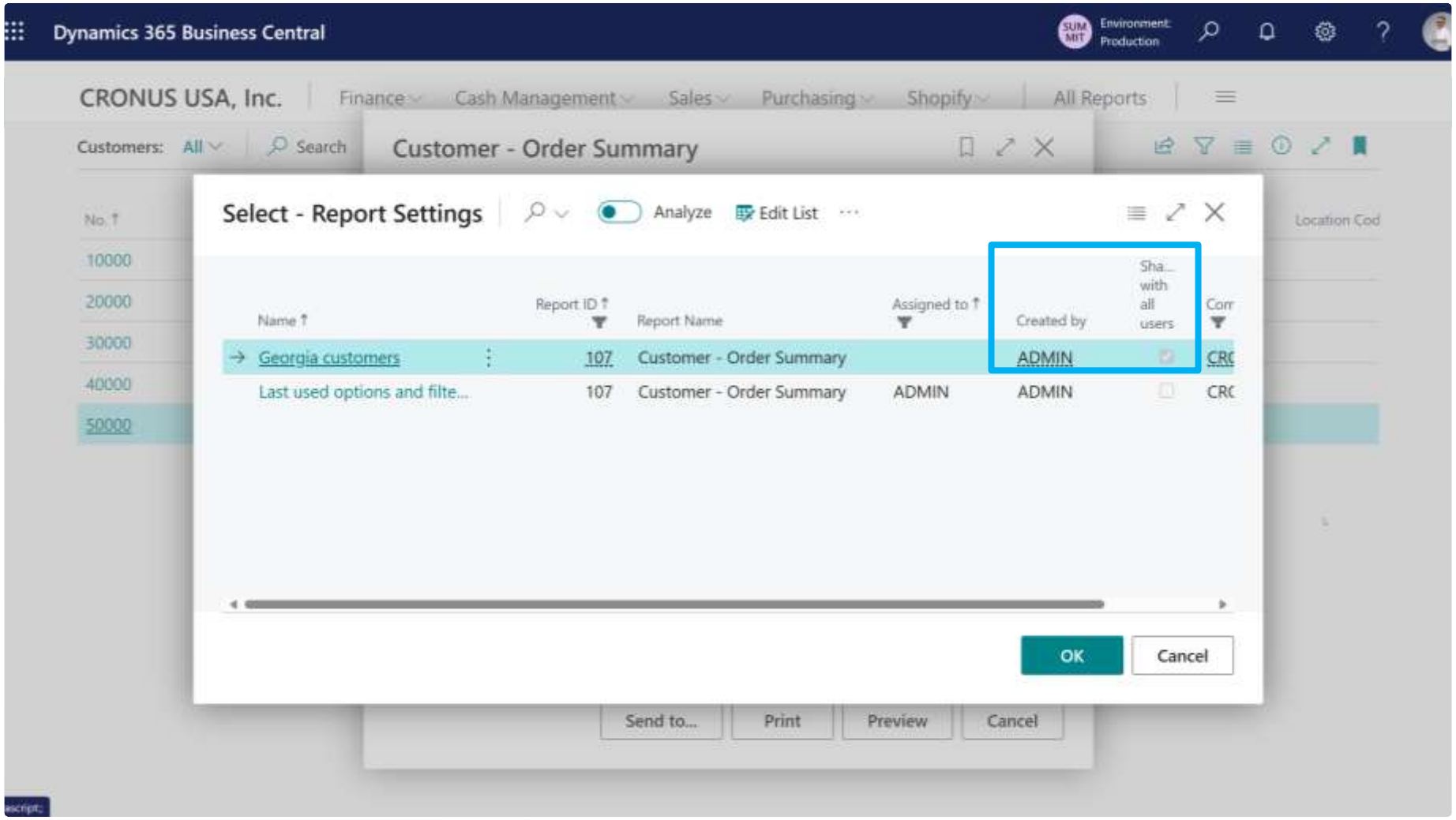
#20: Share report settings across the company



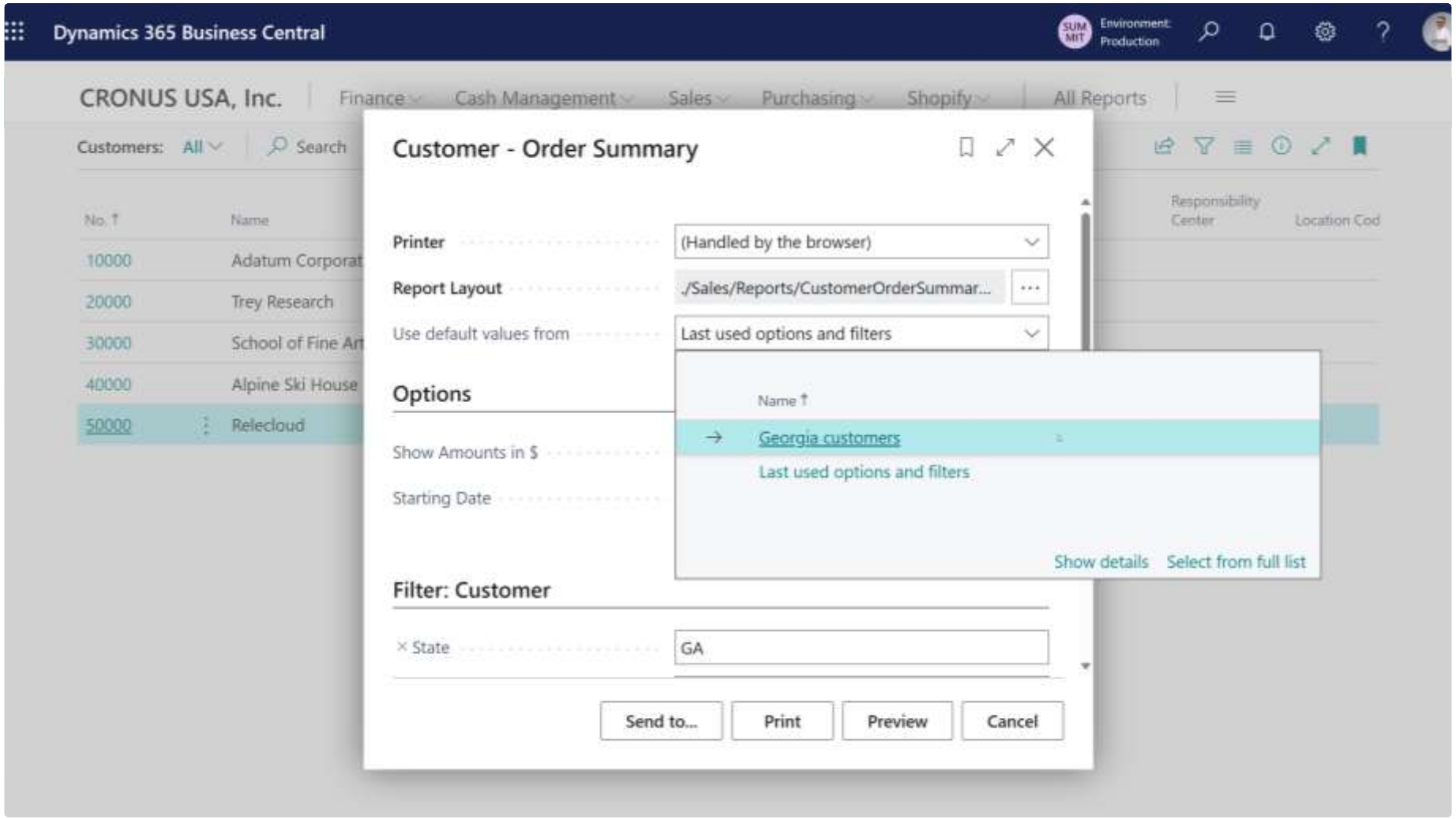
#20: Share report settings across the company



#20: Share report settings across the company



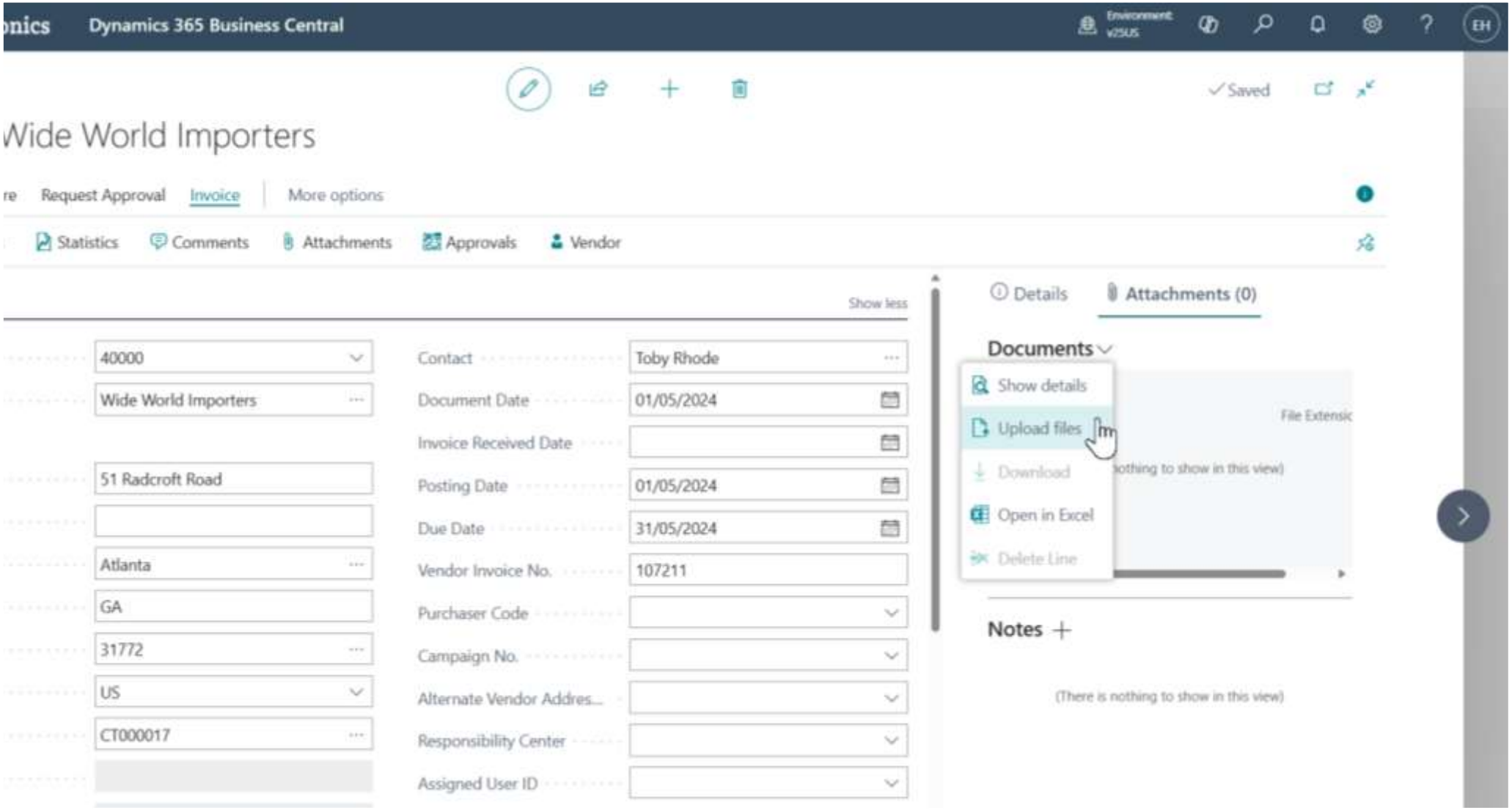
#20: Share report settings across the company



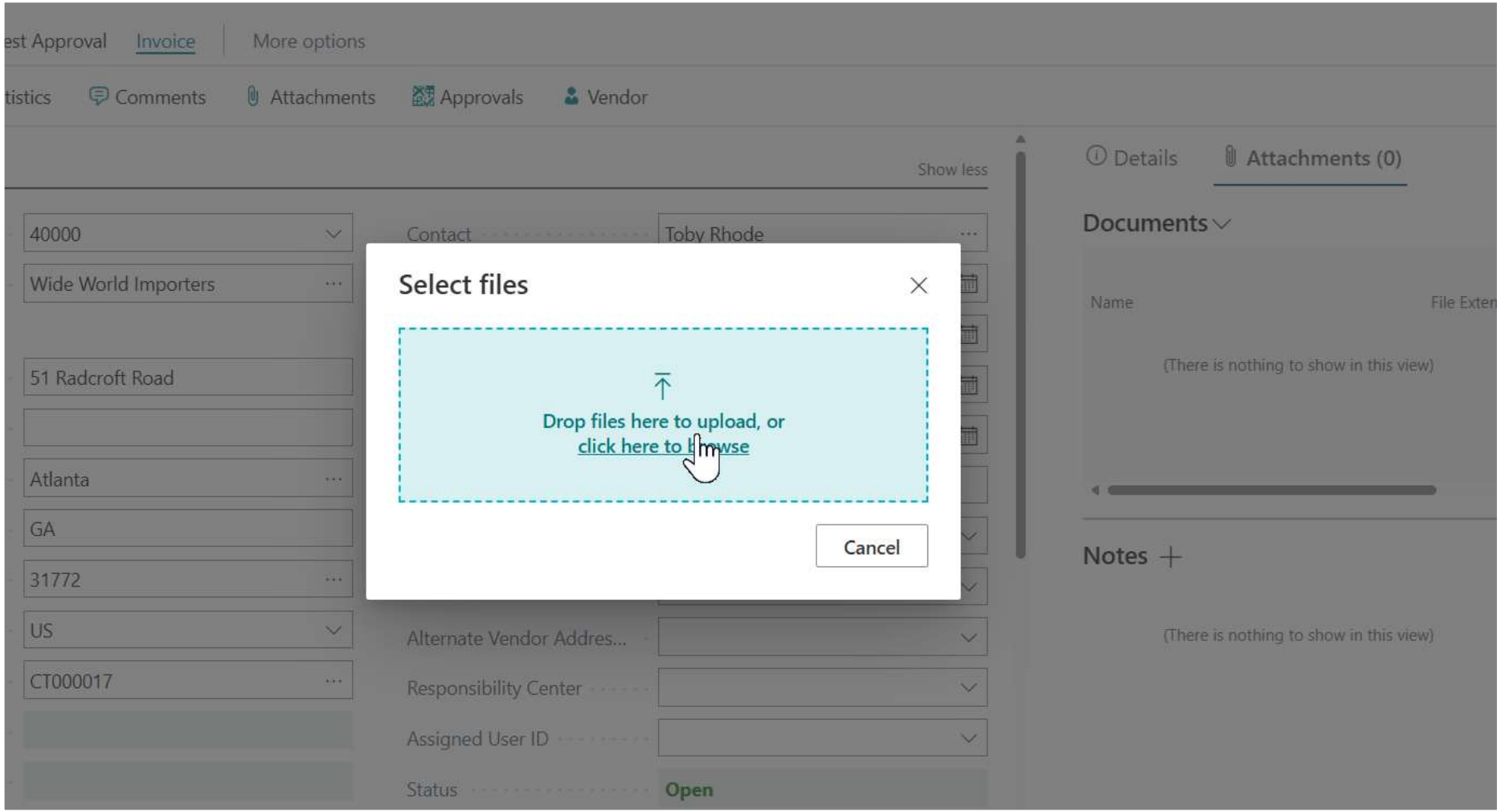


Tip # 21

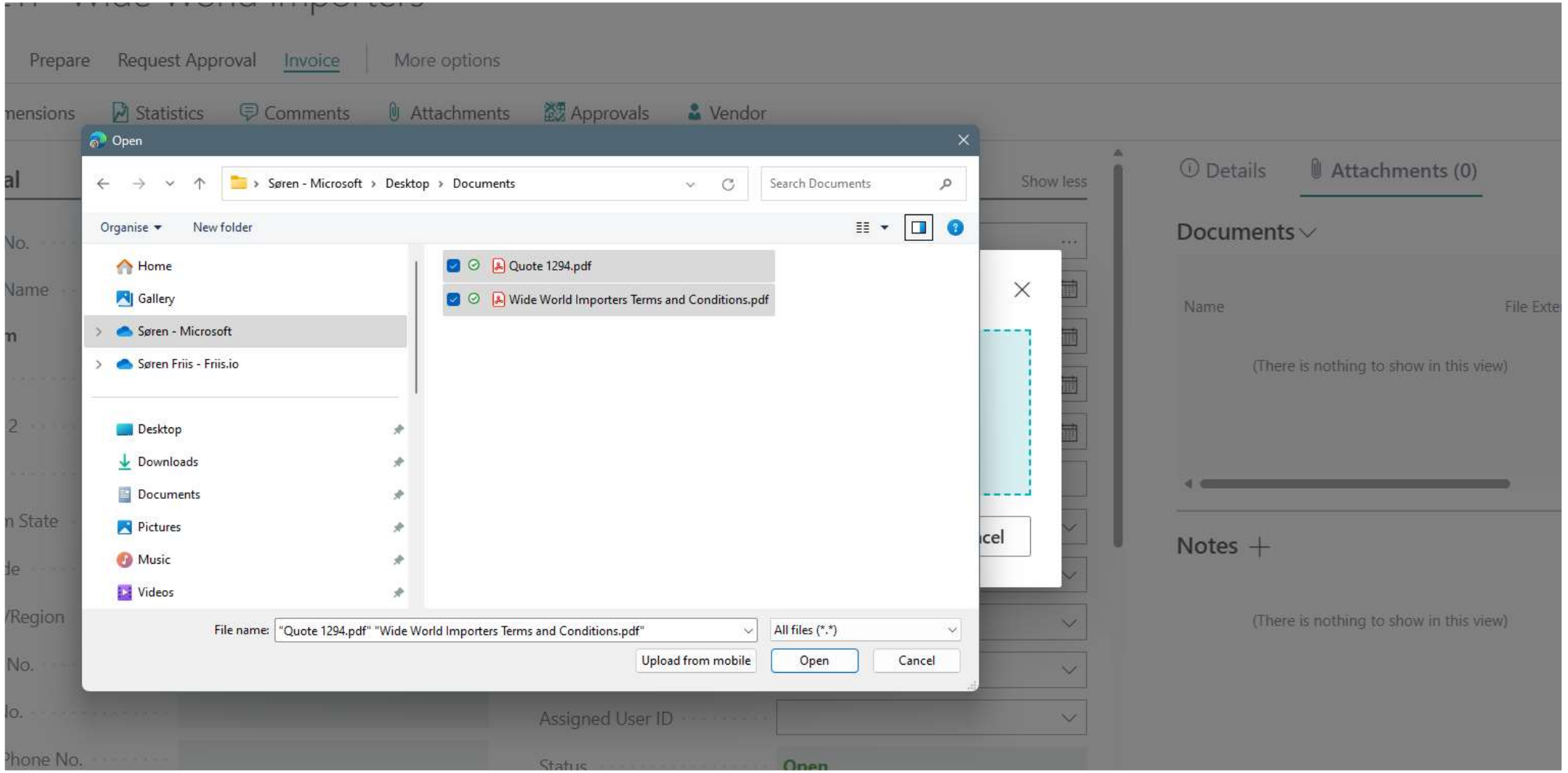
#21: Upload multiple files in the new Document Attachment FactBox



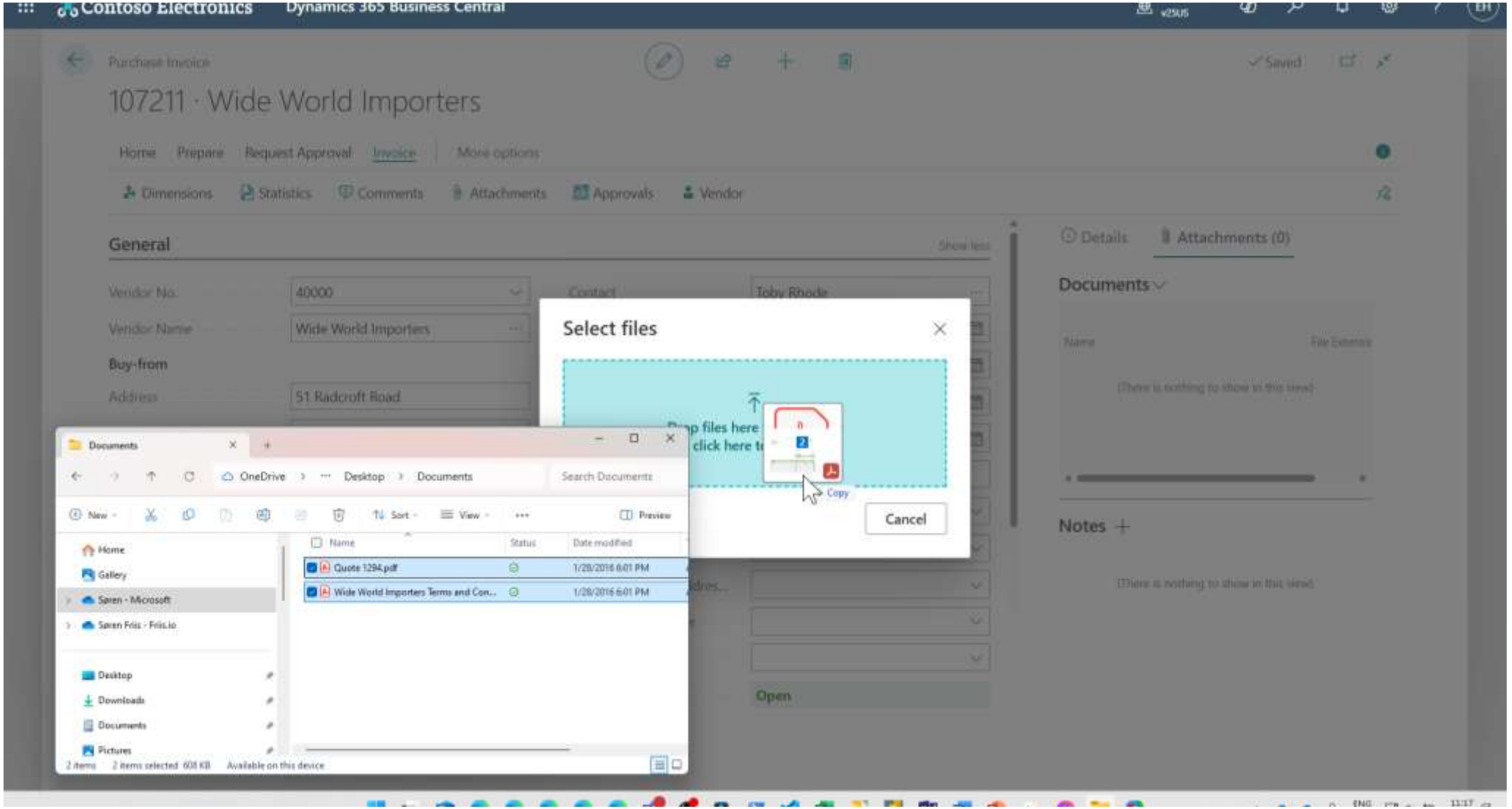
#21: Upload multiple files in the new Document Attachment FactBox



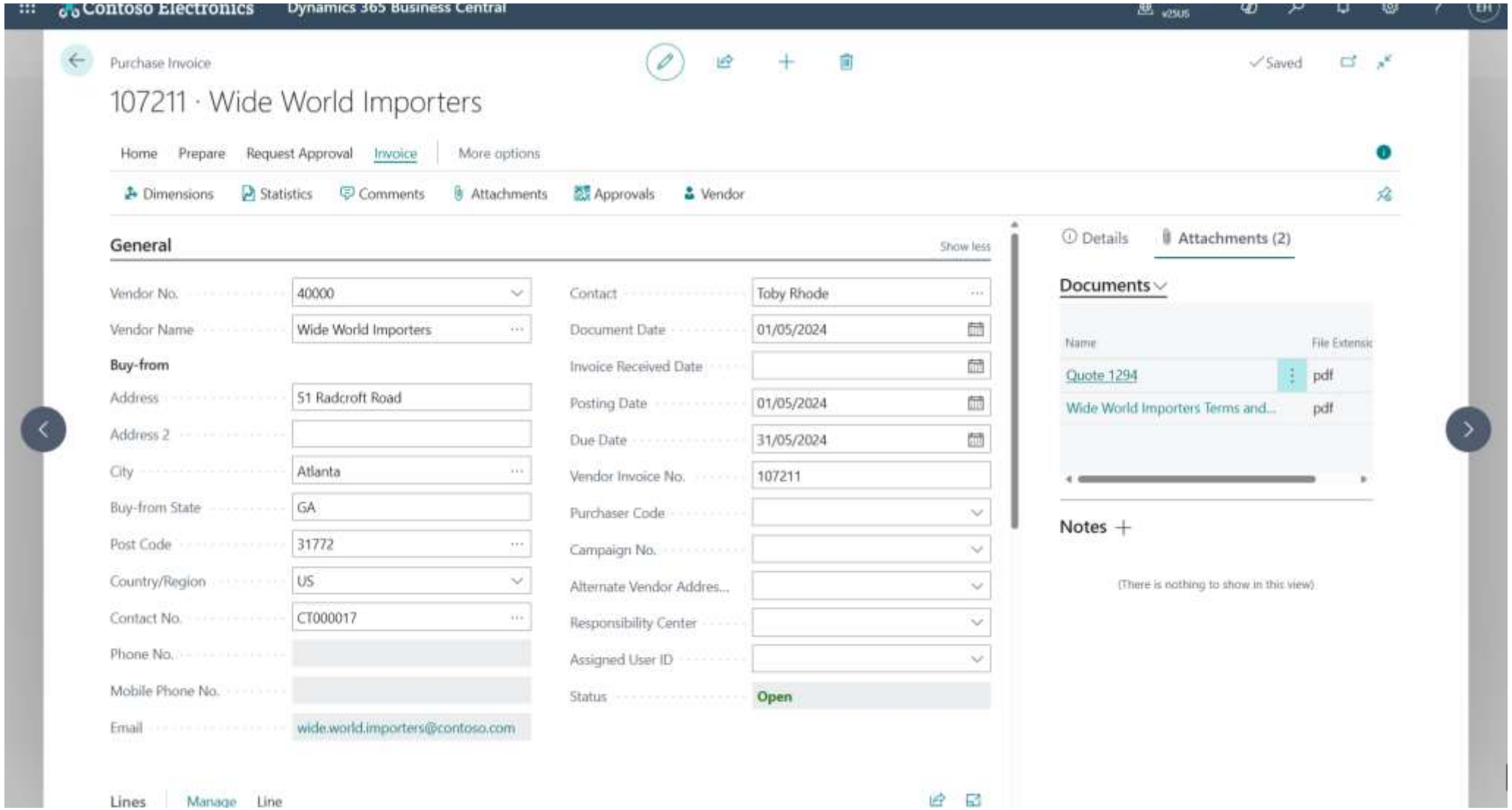
#21: Upload multiple files in the new Document Attachment FactBox



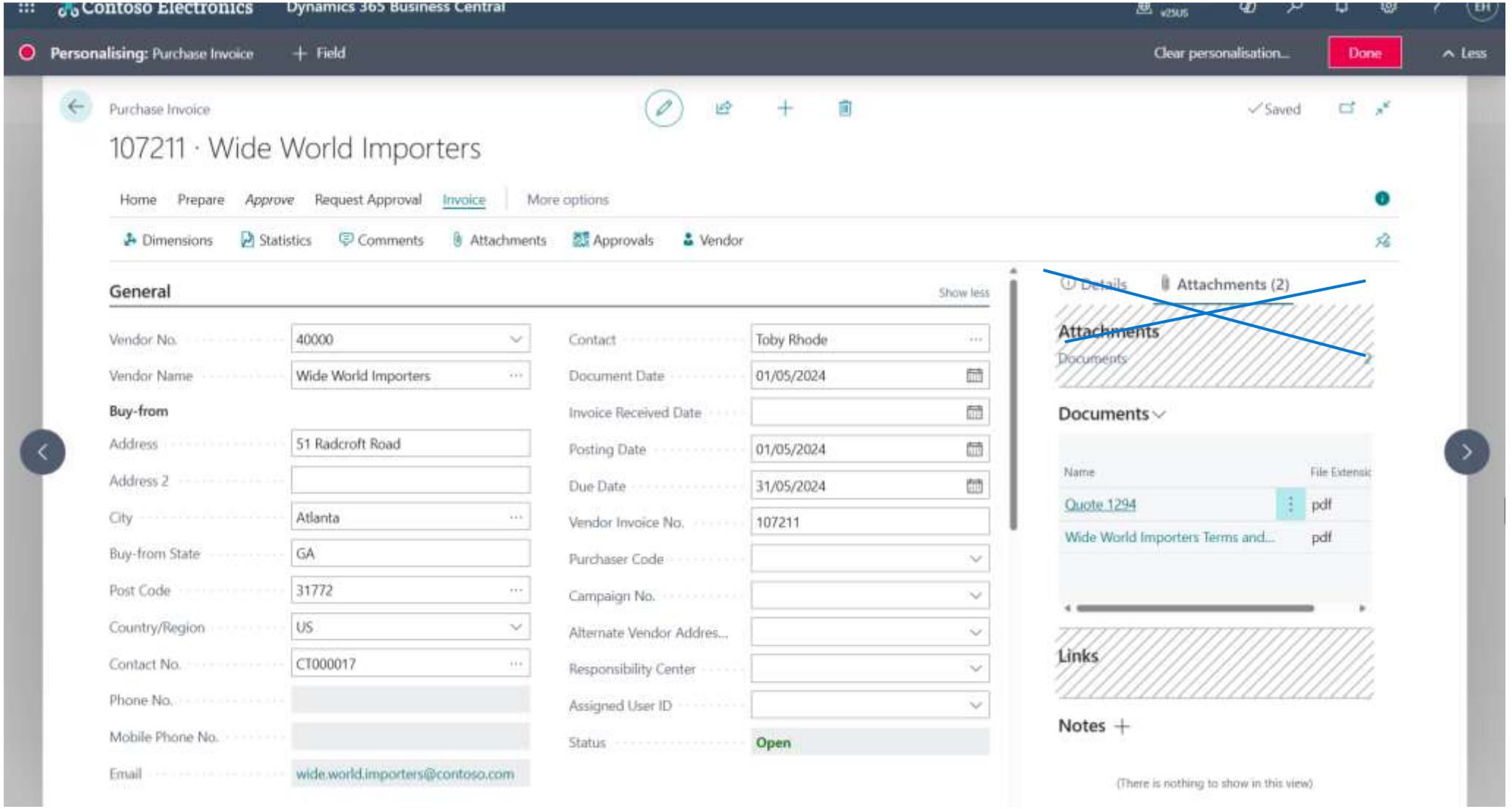
#21: Upload multiple files in the new Document Attachment FactBox



#21: Upload multiple files in the new Document Attachment FactBox



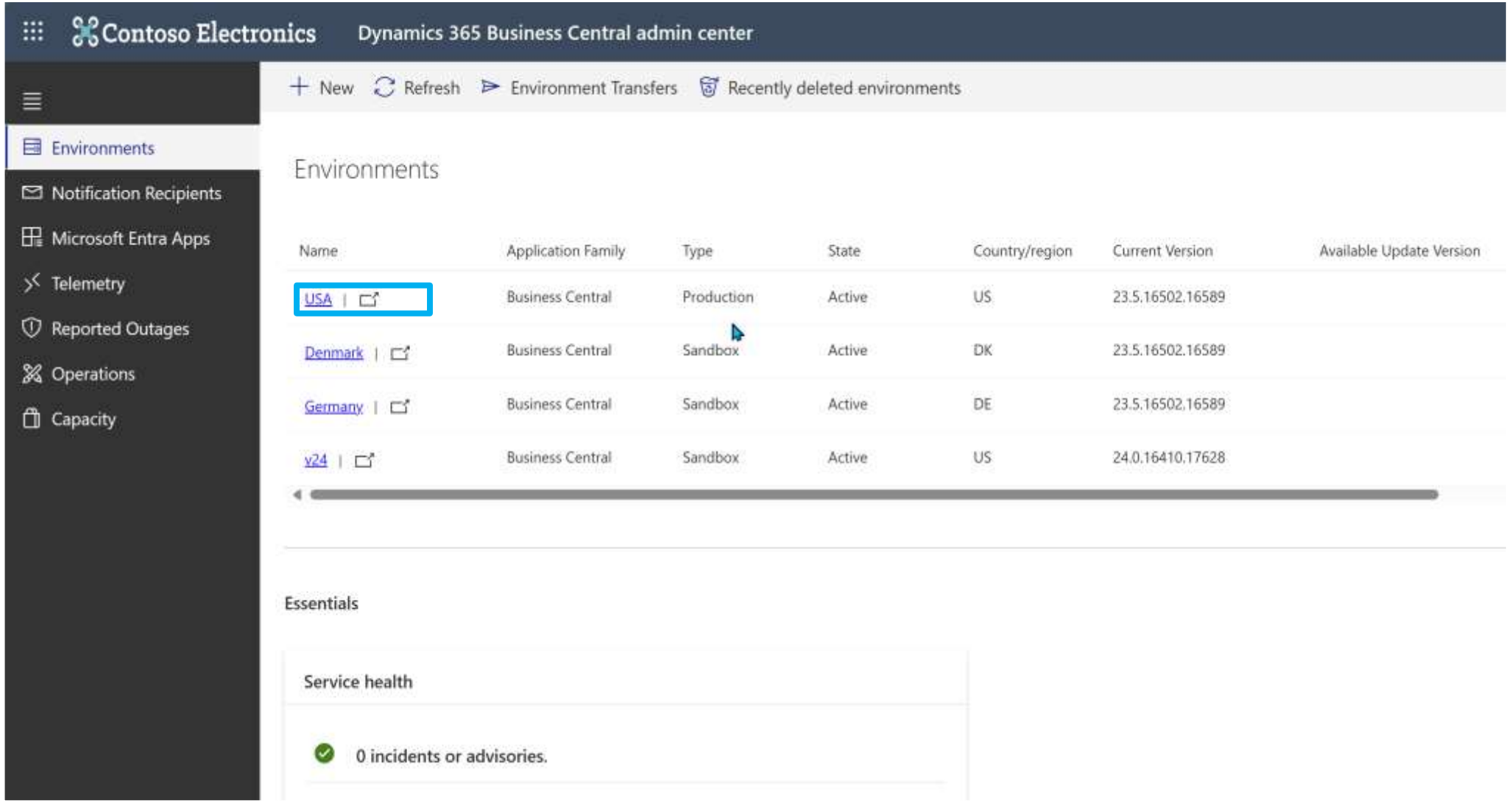
#21: Upload multiple files in the new Document Attachment FactBox



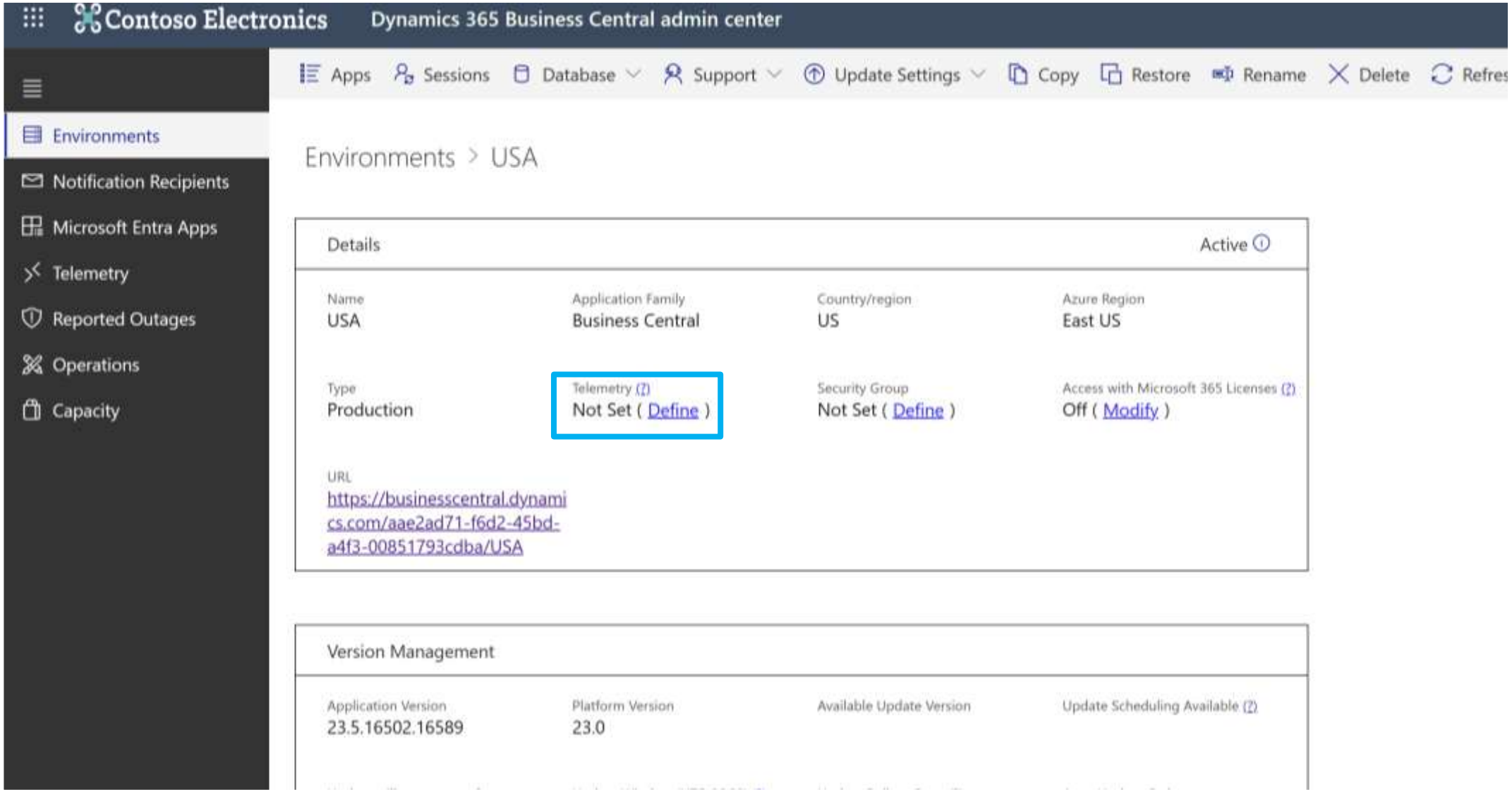


Tip # 22

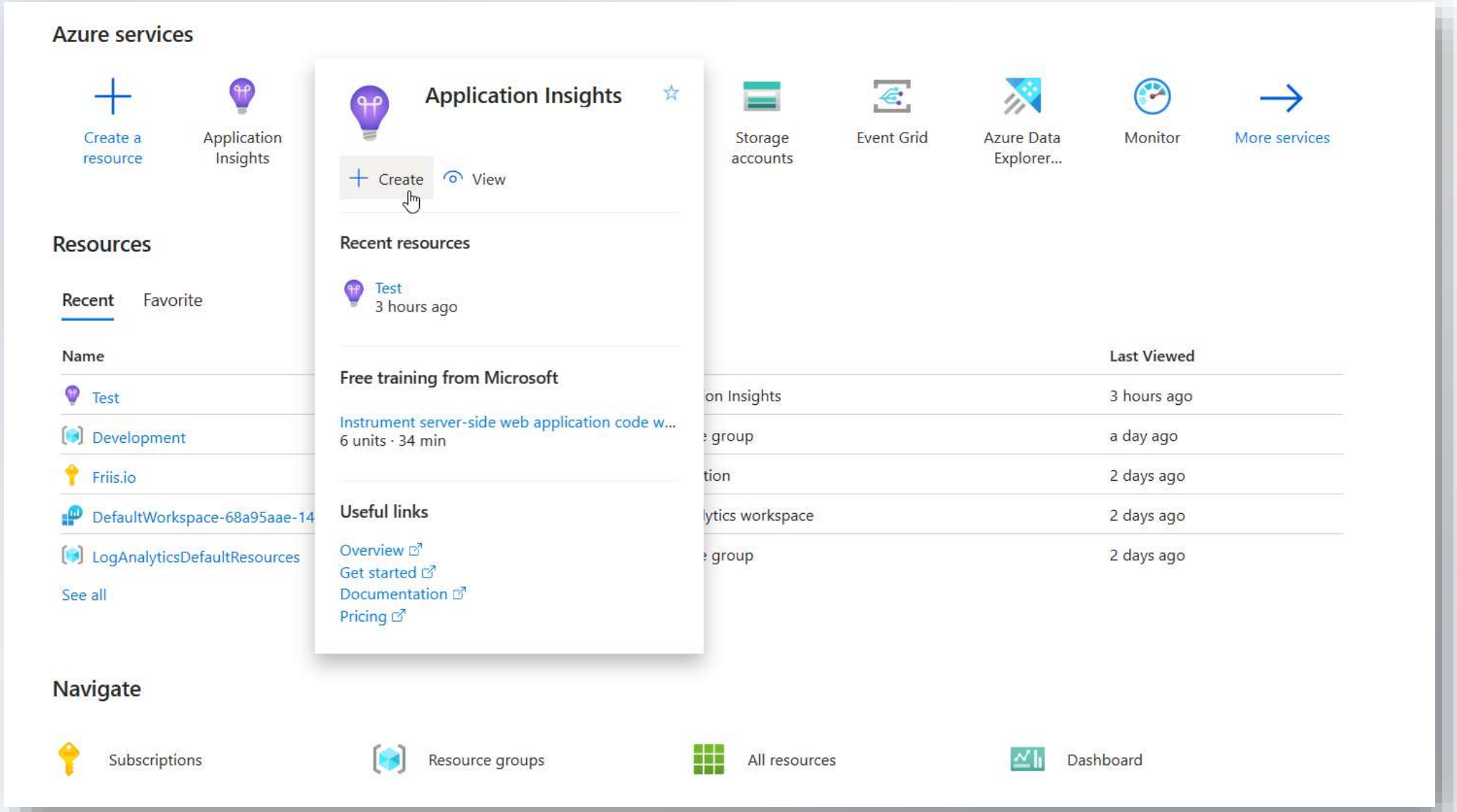
#22: Get insights into usage of BC – enable Application Insights



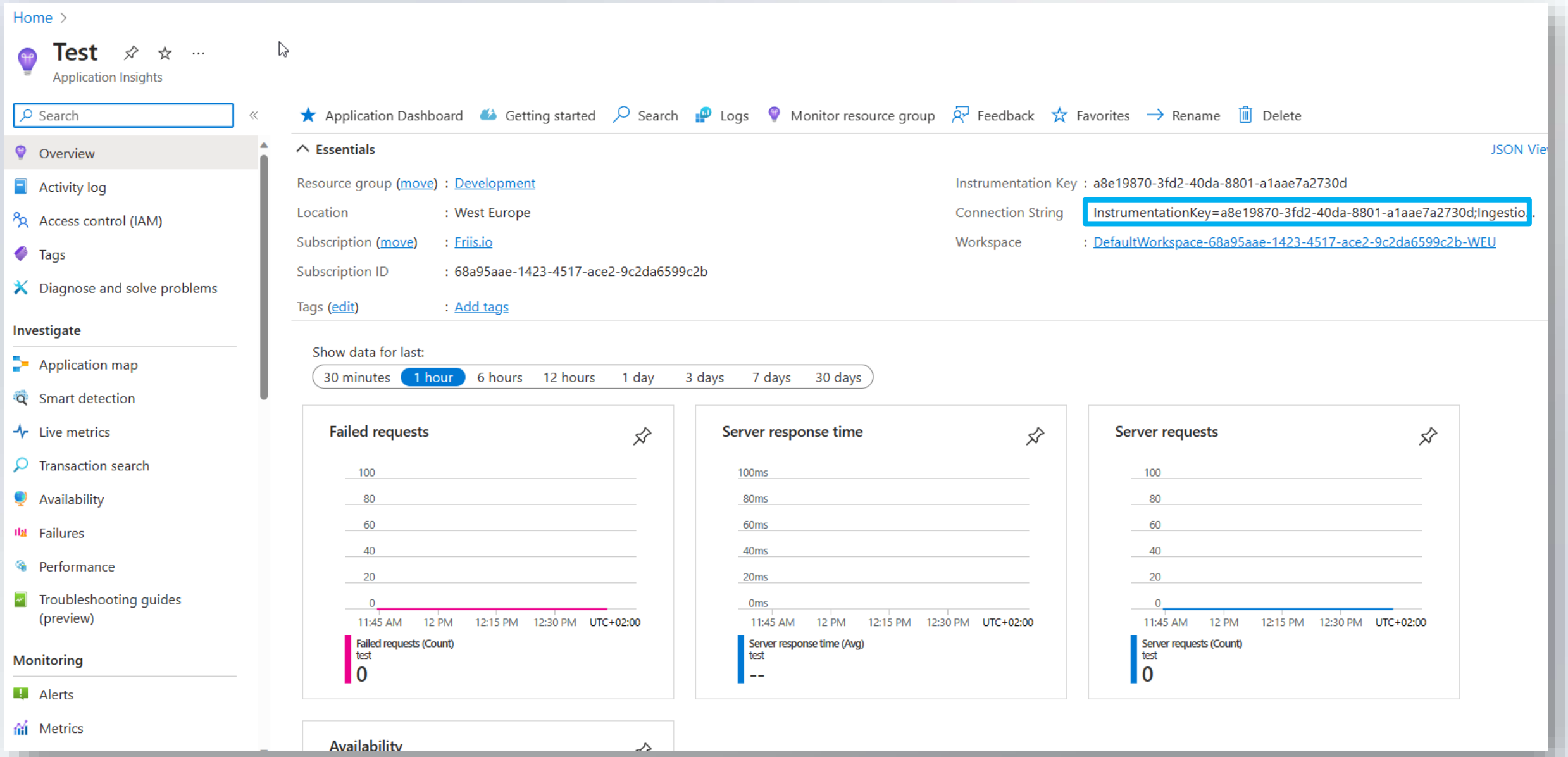
#22: Get insights into usage of BC – enable Application Insights



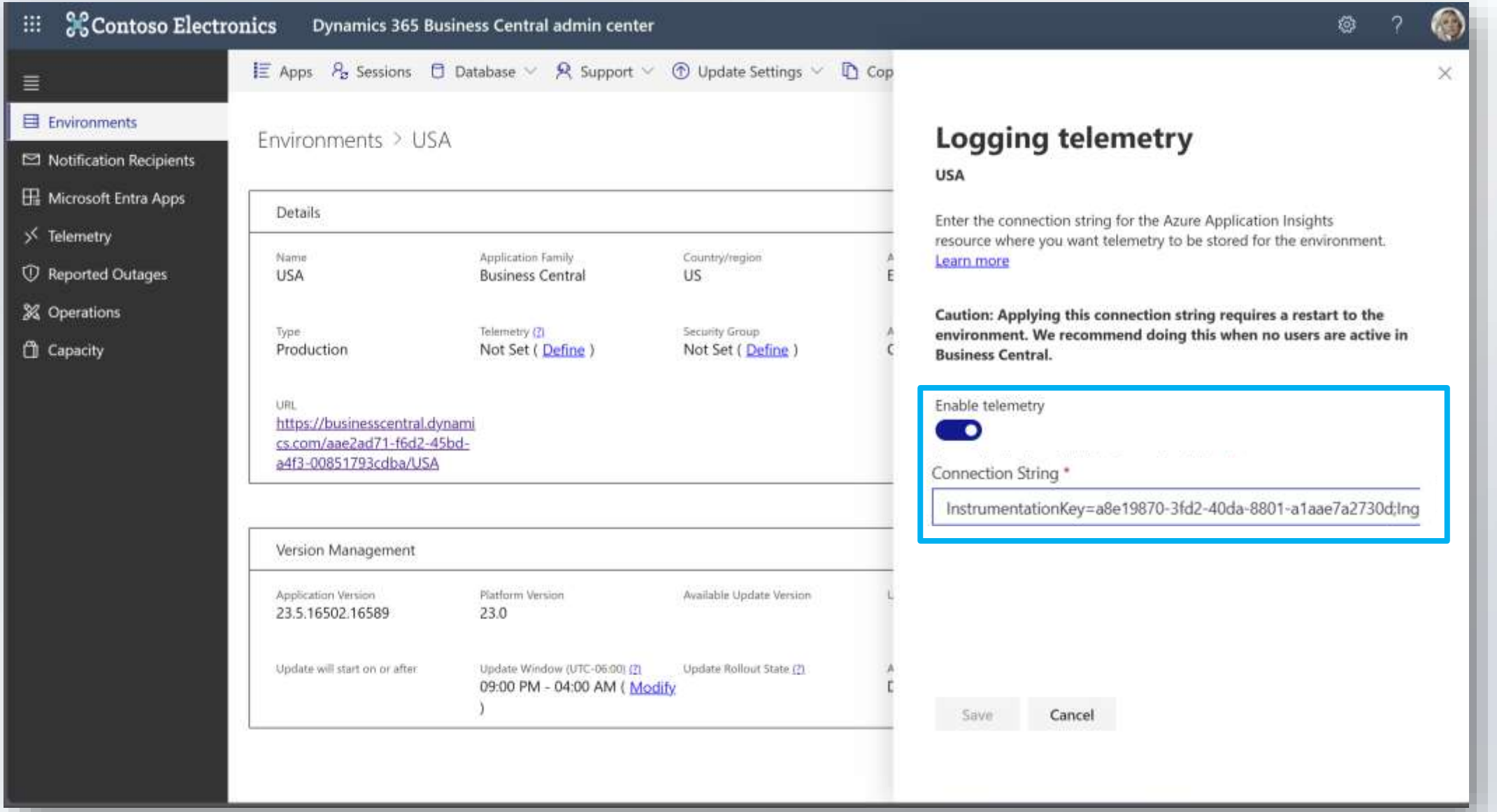
#22: Get insights into usage of BC – enable Application Insights



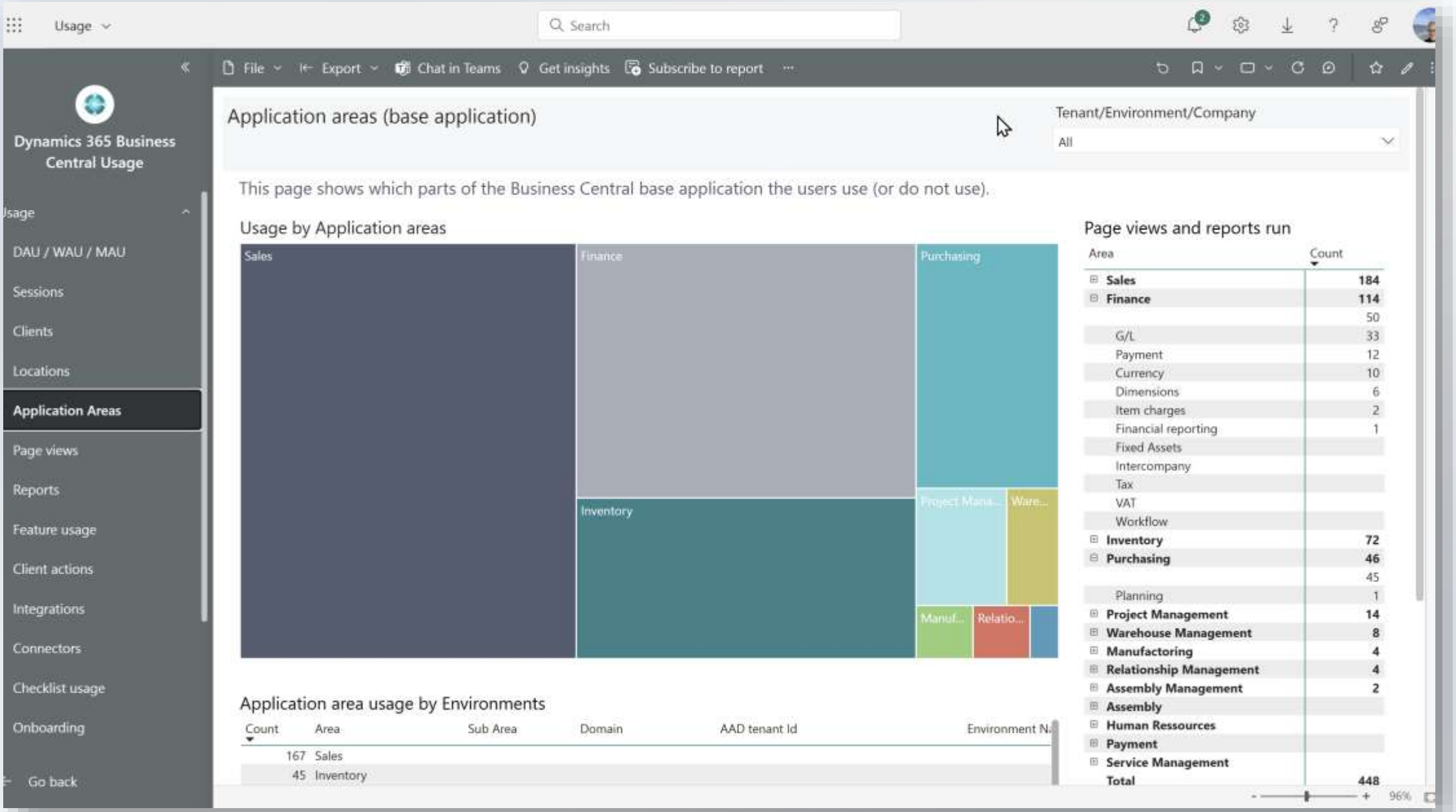
#22: Get insights into usage of BC – enable Application Insights



#22: Get insights into usage of BC – enable Application Insights



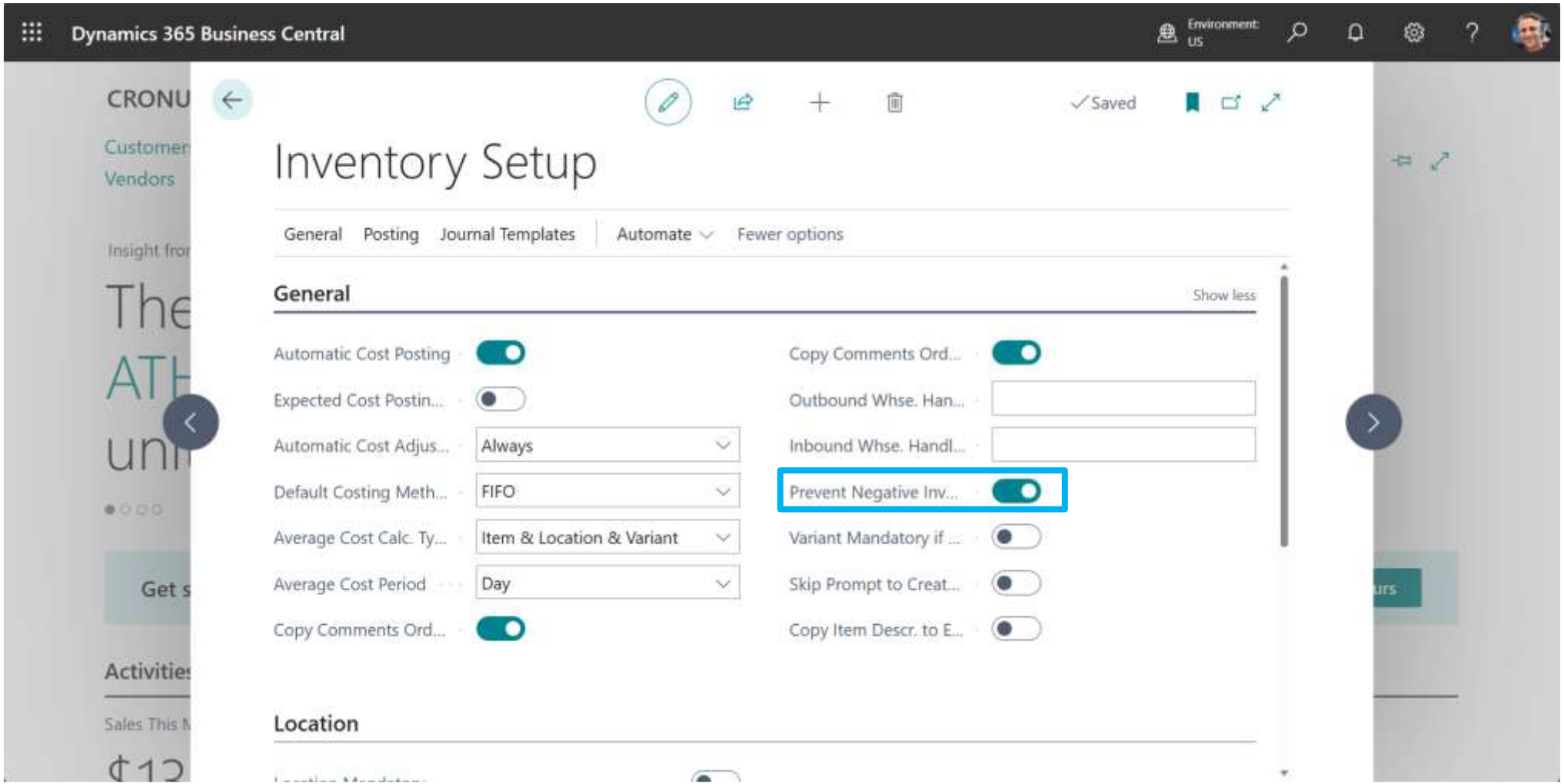
#22: Get insights into usage of BC – enable Application Insights



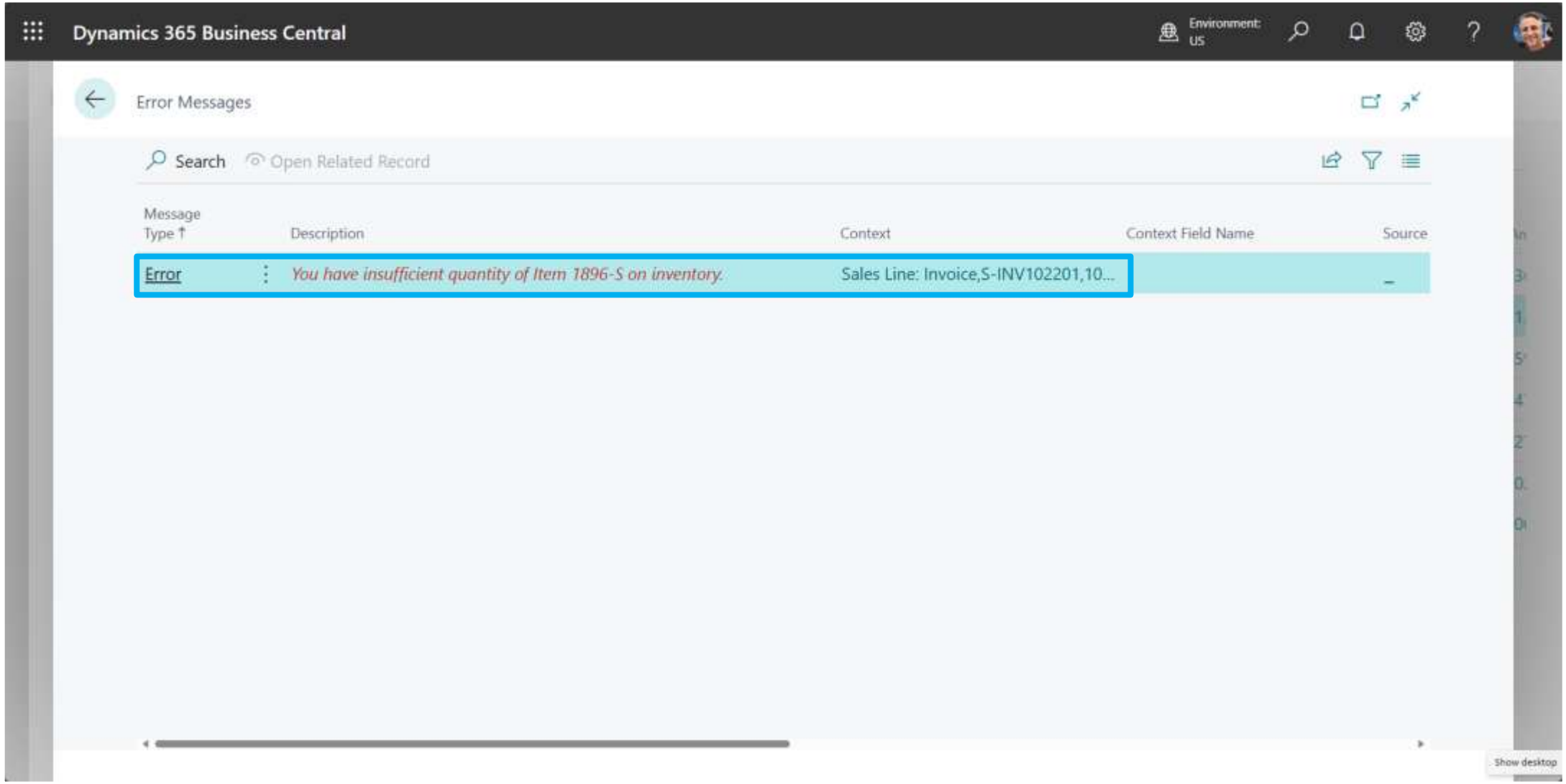


Tip # 23

#23: Prevent negative inventory

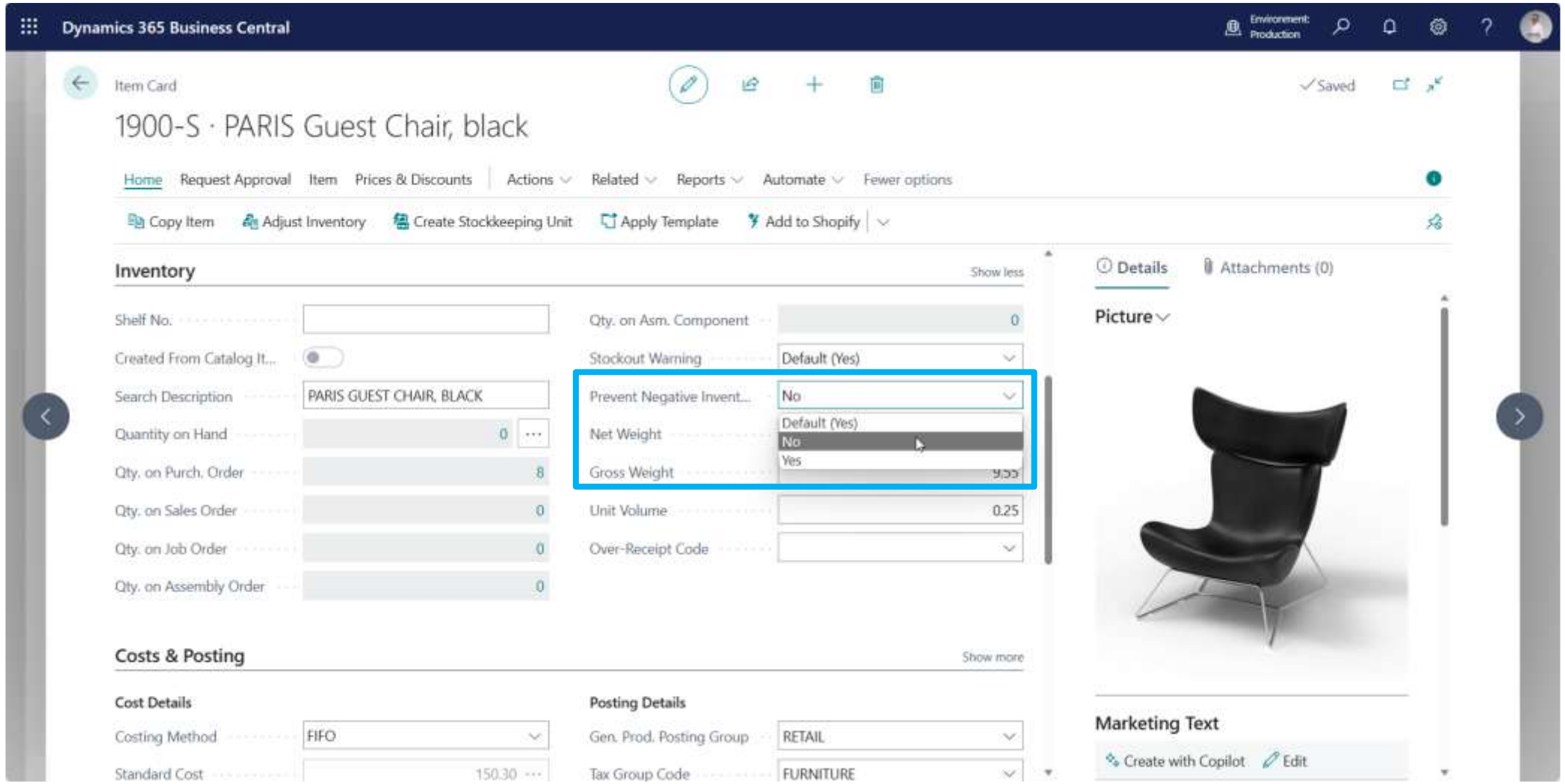


Example of blocking negative inventory at sales invoice posting



Override on the individual items

Most permissive wins



NEW

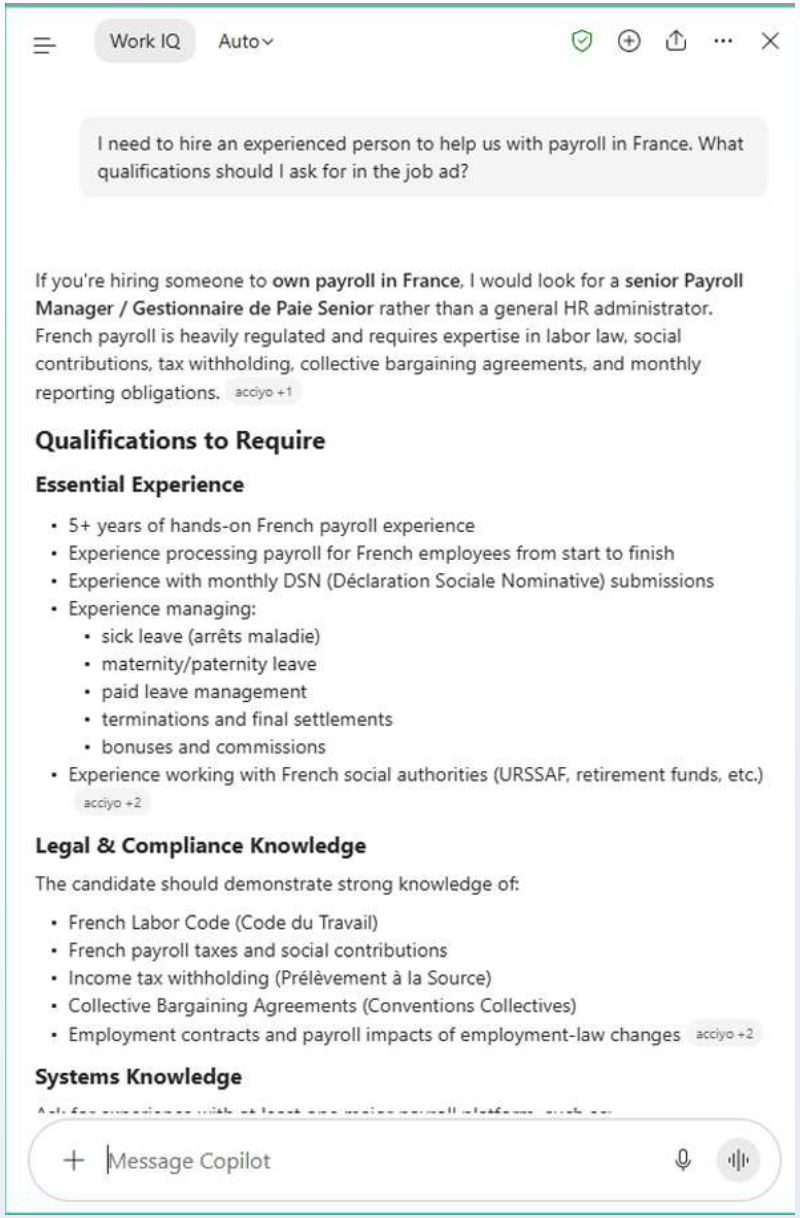


Tip # 24

#24: Copilot – Find information on the Internet

Try something like:

- “I’m considering doing business with UK companies. What are the latest tax rules here that I have take into account?”
- “I need to expand coffee machine selection in our catalogue. What are the latest models that I should start reselling for our Danish customers?”
- “I need to hire an experienced person to help should I ask for in the job ad?” us with payroll in France. What qualifications



#25: Troubleshoot the Business Central online service connectivity

Navigate to:

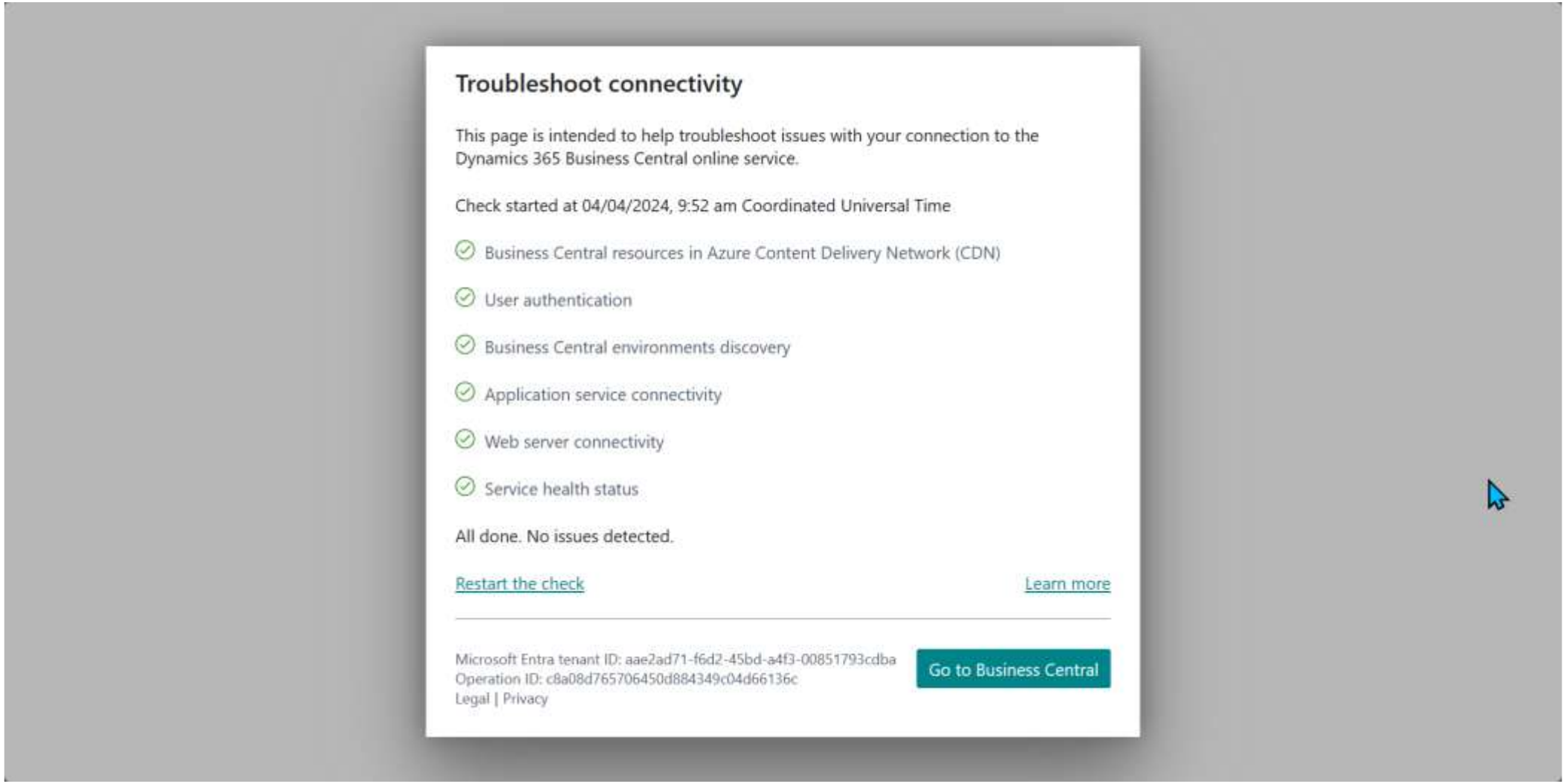
https://businesscentral.dynamics.com/connectivity

Or to:

https://aka.ms/bccp

(short for Business Central Client Performance)

#25: Troubleshoot Business Central online connectivity

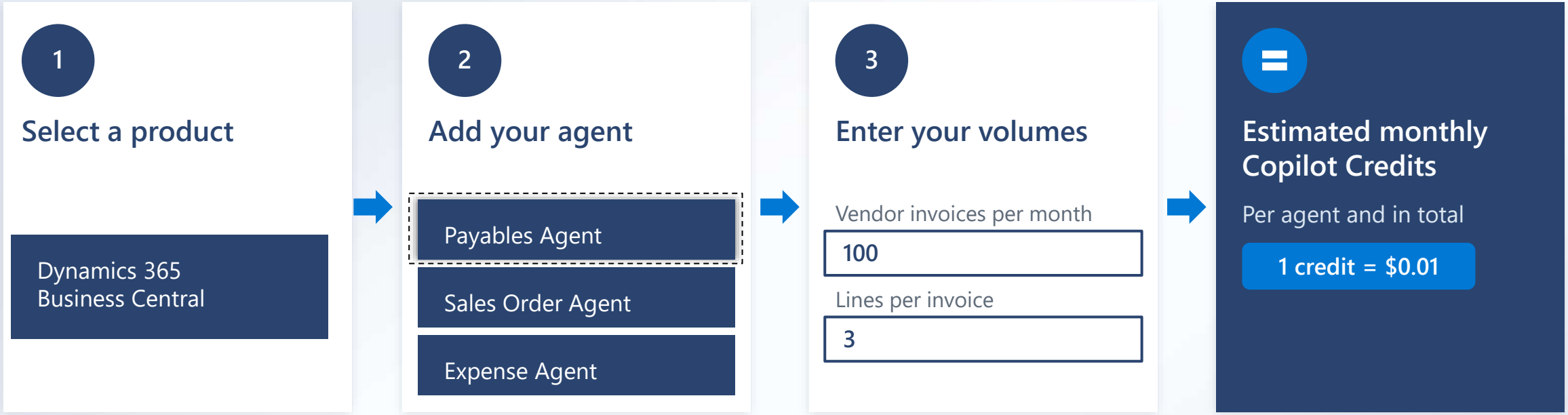


NEW



Tip # 26

#29: Estimate cost of running 1p Agents



Copilot Credit Estimator

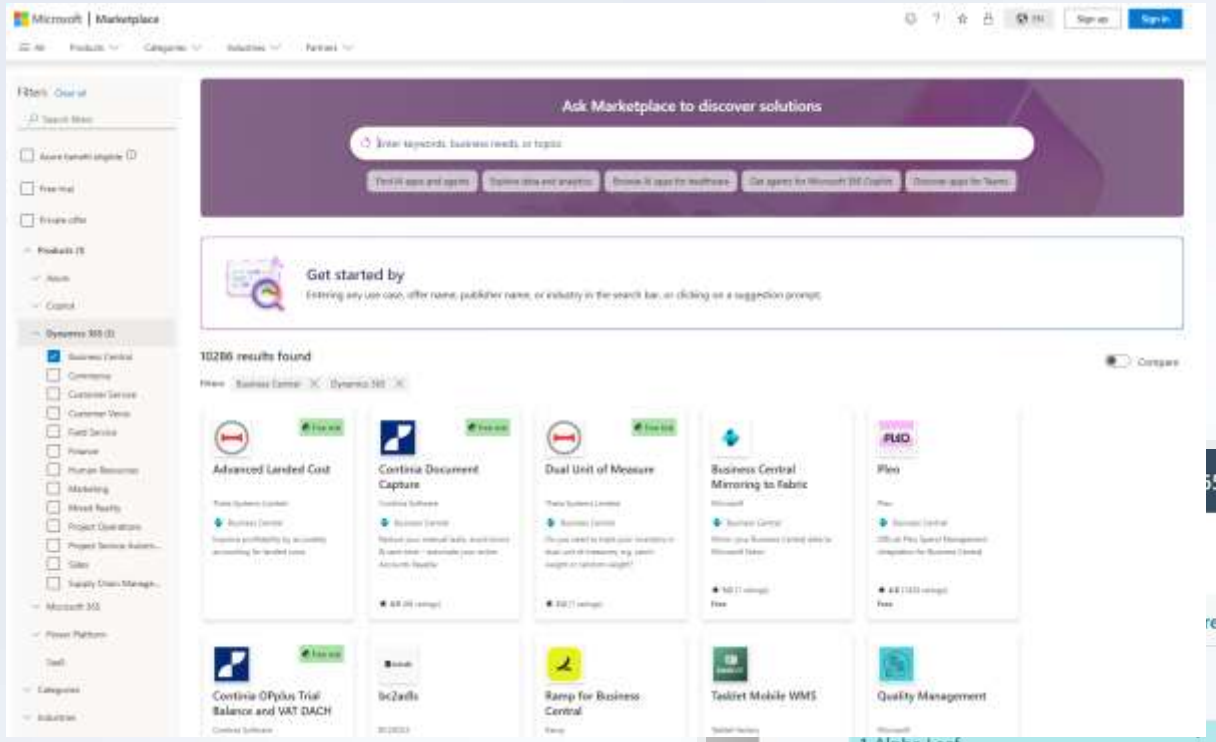
https://microsoft.github.io/copilot-studio-estimator/

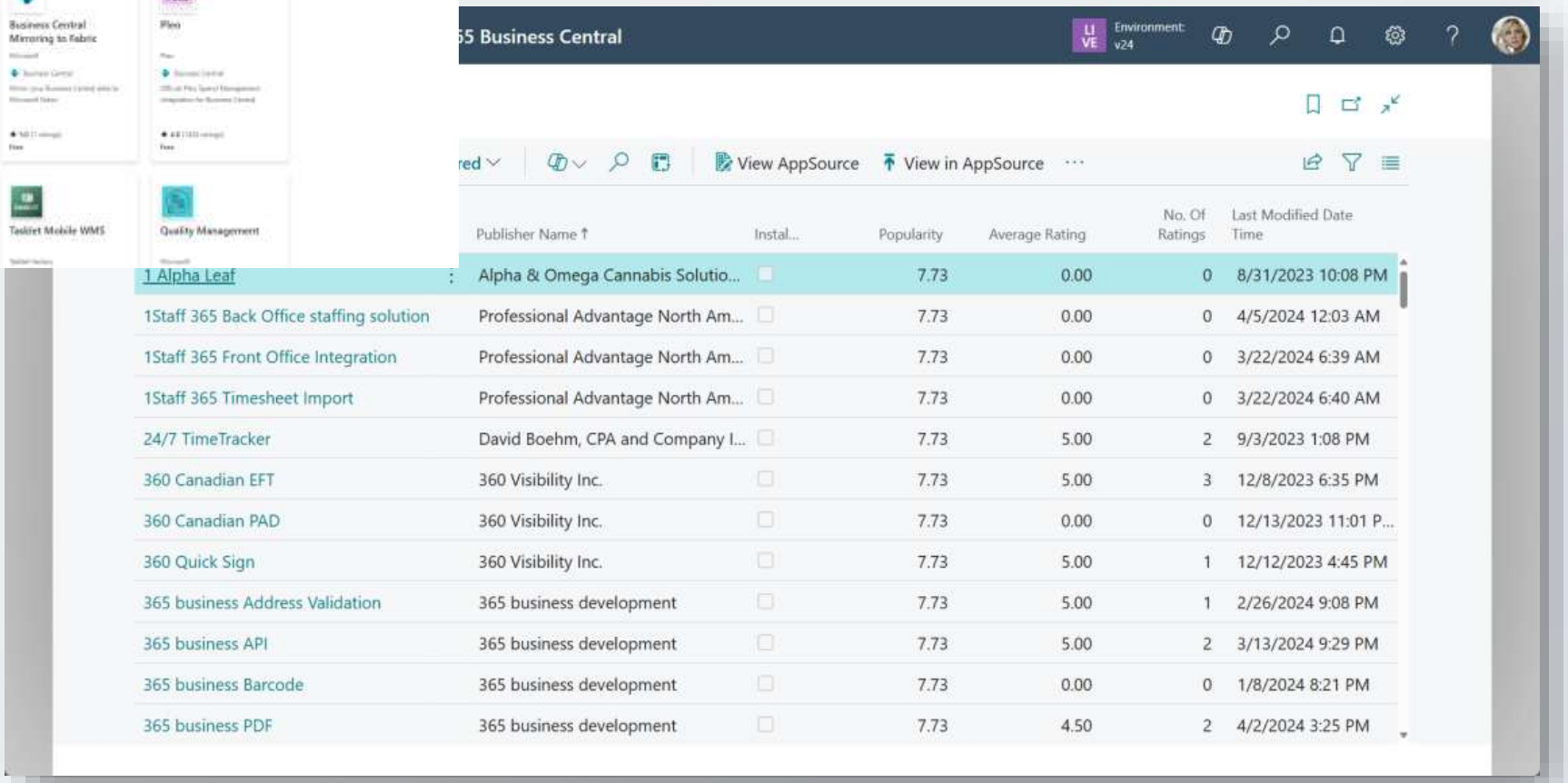
Suggestion for partners: Test scenarios & Have customers run their processes



Tip # 27

#27: Find apps on Microsoft Marketplace

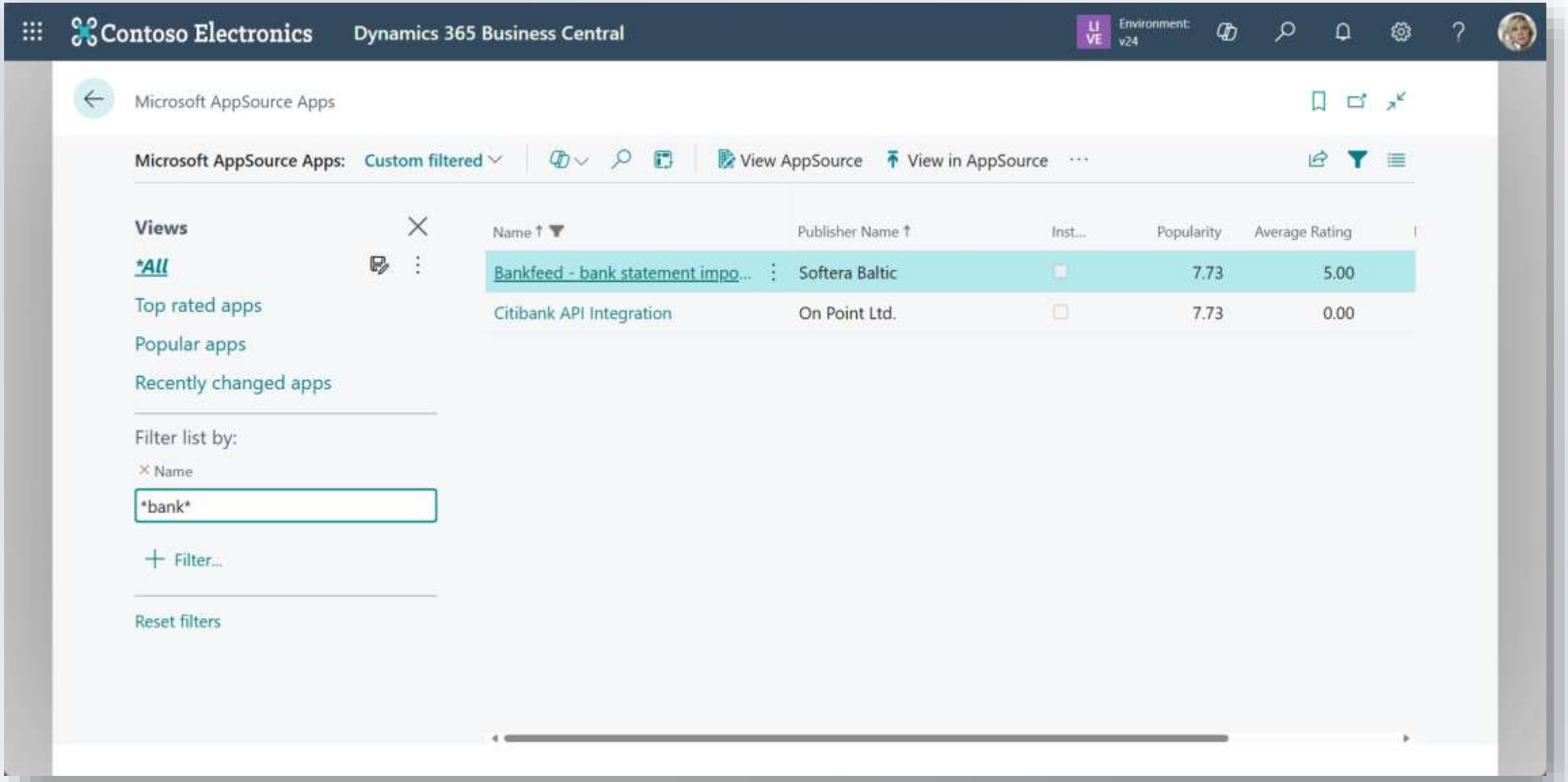




Publisher Name	Instal...	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solutio...	7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North Am...	7.73	0.00	0	4/5/2024 12:03 AM
1Staff 365 Front Office Integration	Professional Advantage North Am...	7.73	0.00	0	3/22/2024 6:39 AM
1Staff 365 Timesheet Import	Professional Advantage North Am...	7.73	0.00	0	3/22/2024 6:40 AM
24/7 TimeTracker	David Boehm, CPA and Company I...	7.73	5.00	2	9/3/2023 1:08 PM
360 Canadian EFT	360 Visibility Inc.	7.73	5.00	3	12/8/2023 6:35 PM
360 Canadian PAD	360 Visibility Inc.	7.73	0.00	0	12/13/2023 11:01 P...
360 Quick Sign	360 Visibility Inc.	7.73	5.00	1	12/12/2023 4:45 PM
365 business Address Validation	365 business development	7.73	5.00	1	2/26/2024 9:08 PM
365 business API	365 business development	7.73	5.00	2	3/13/2024 9:29 PM
365 business Barcode	365 business development	7.73	0.00	0	1/8/2024 8:21 PM
365 business PDF	365 business development	7.73	4.50	2	4/2/2024 3:25 PM

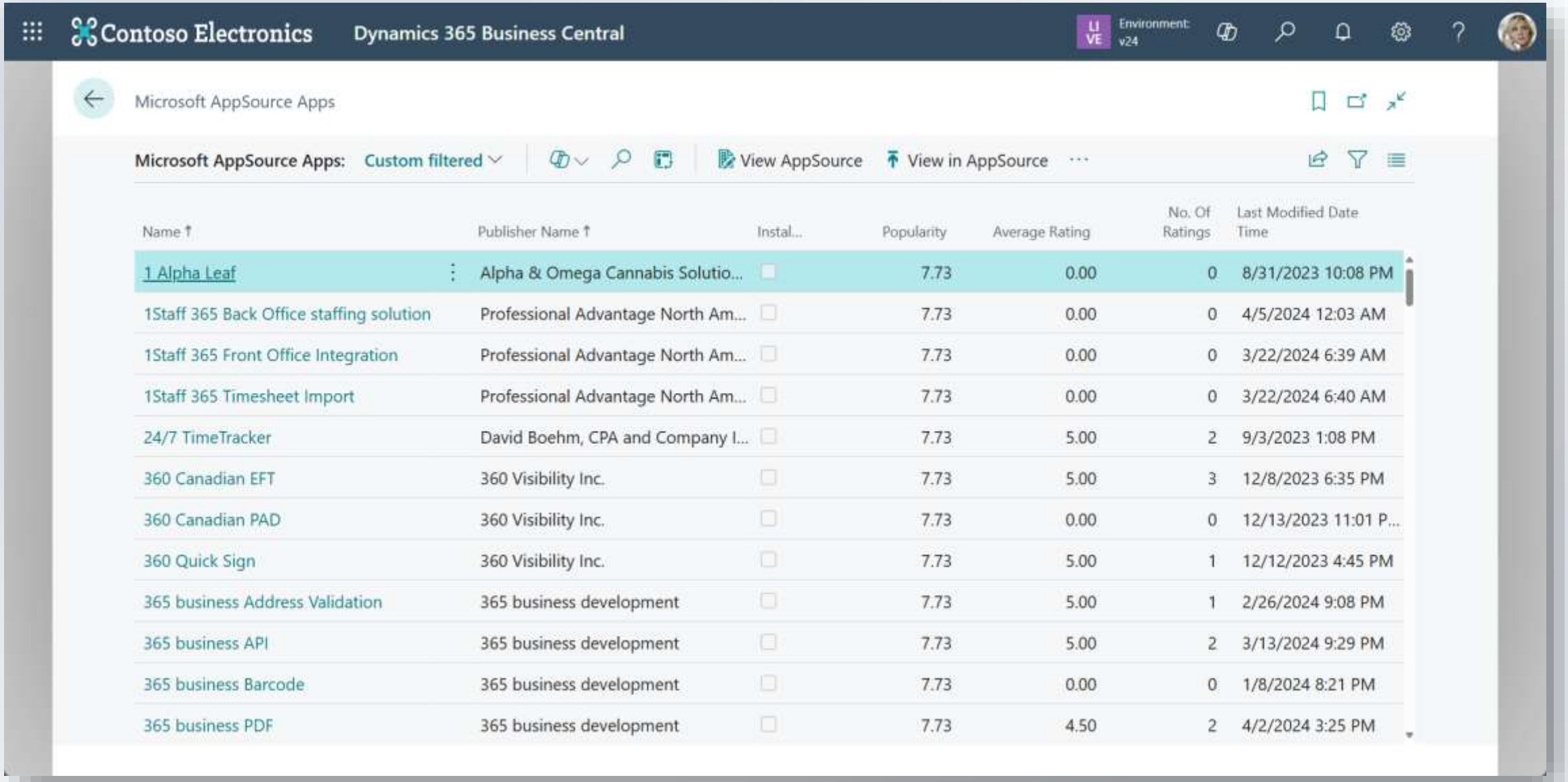
#27: Find apps on Microsoft Marketplace

List supports normal Business Central filtering



#27: Find apps on Microsoft Marketplace

Filtered to apps that works on *this* environment localization

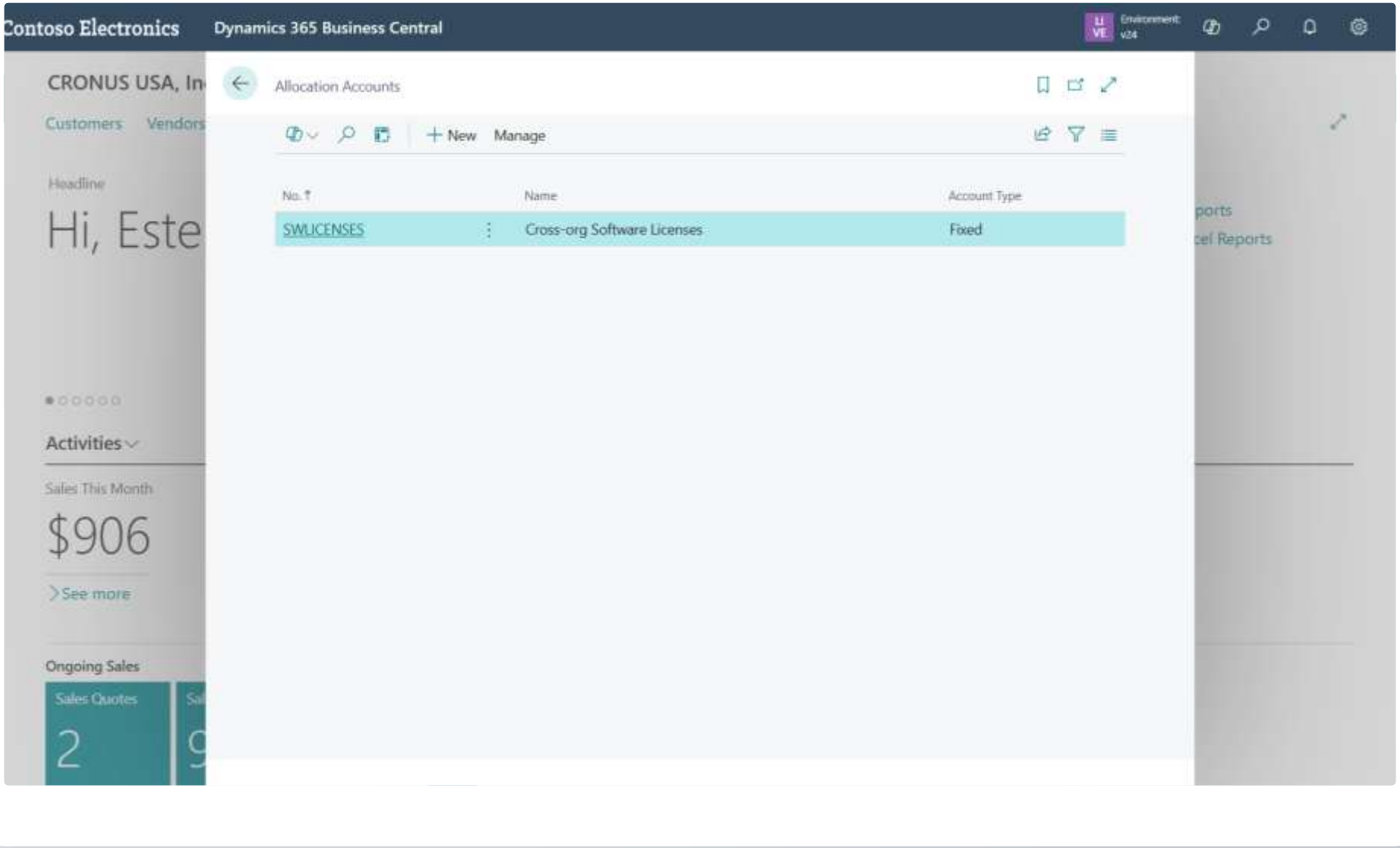


Name	Publisher Name	Instal...	Popularity	Average Rating	No. Of Ratings	Last Modified Date Time
1 Alpha Leaf	Alpha & Omega Cannabis Solutio...		7.73	0.00	0	8/31/2023 10:08 PM
1Staff 365 Back Office staffing solution	Professional Advantage North Am...		7.73	0.00	0	4/5/2024 12:03 AM
1Staff 365 Front Office Integration	Professional Advantage North Am...		7.73	0.00	0	3/22/2024 6:39 AM
1Staff 365 Timesheet Import	Professional Advantage North Am...		7.73	0.00	0	3/22/2024 6:40 AM
24/7 TimeTracker	David Boehm, CPA and Company I...		7.73	5.00	2	9/3/2023 1:08 PM
360 Canadian EFT	360 Visibility Inc.		7.73	5.00	3	12/8/2023 6:35 PM
360 Canadian PAD	360 Visibility Inc.		7.73	0.00	0	12/13/2023 11:01 P...
360 Quick Sign	360 Visibility Inc.		7.73	5.00	1	12/12/2023 4:45 PM
365 business Address Validation	365 business development		7.73	5.00	1	2/26/2024 9:08 PM
365 business API	365 business development		7.73	5.00	2	3/13/2024 9:29 PM
365 business Barcode	365 business development		7.73	0.00	0	1/8/2024 8:21 PM
365 business PDF	365 business development		7.73	4.50	2	4/2/2024 3:25 PM

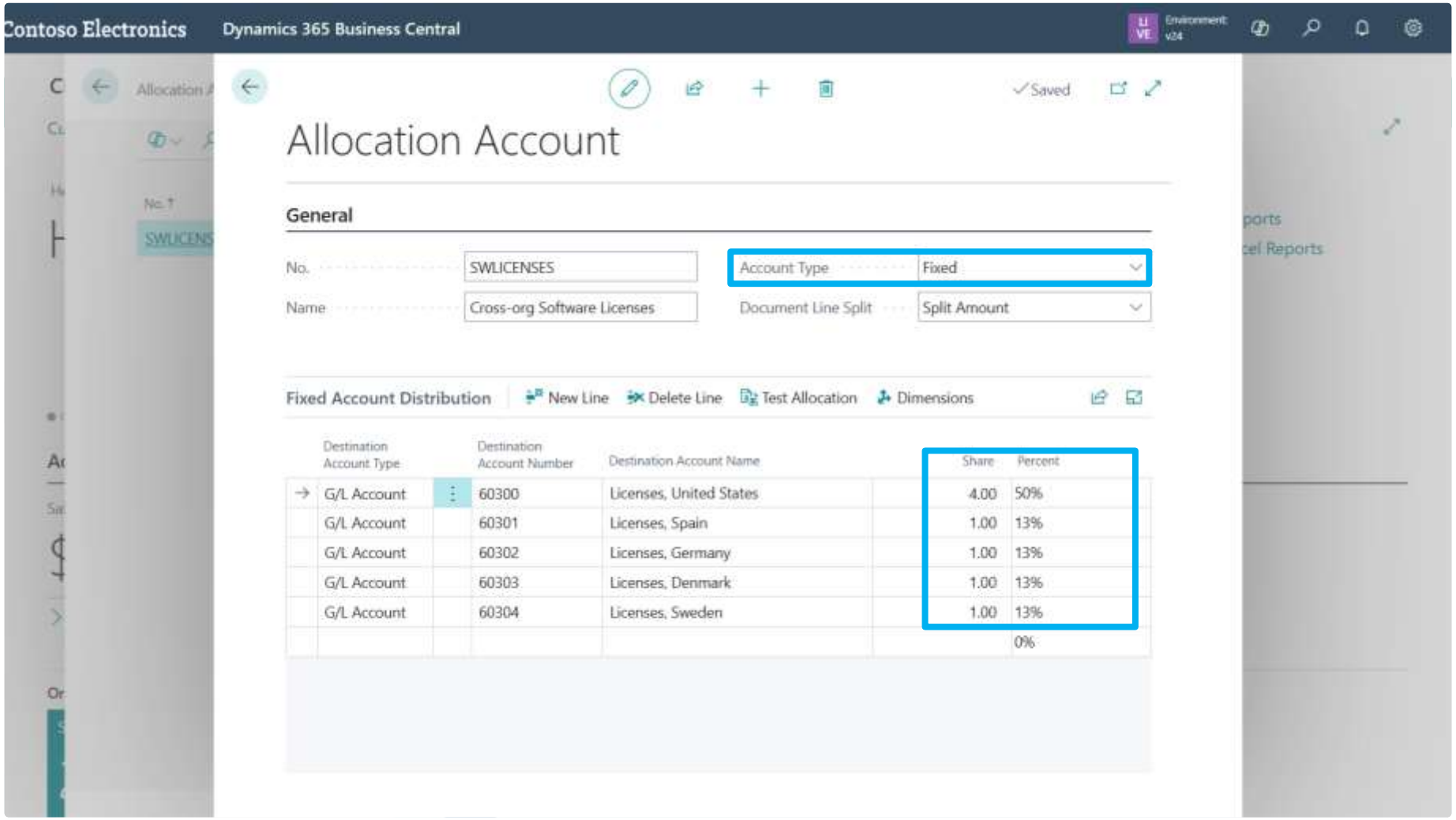


Tip # 28

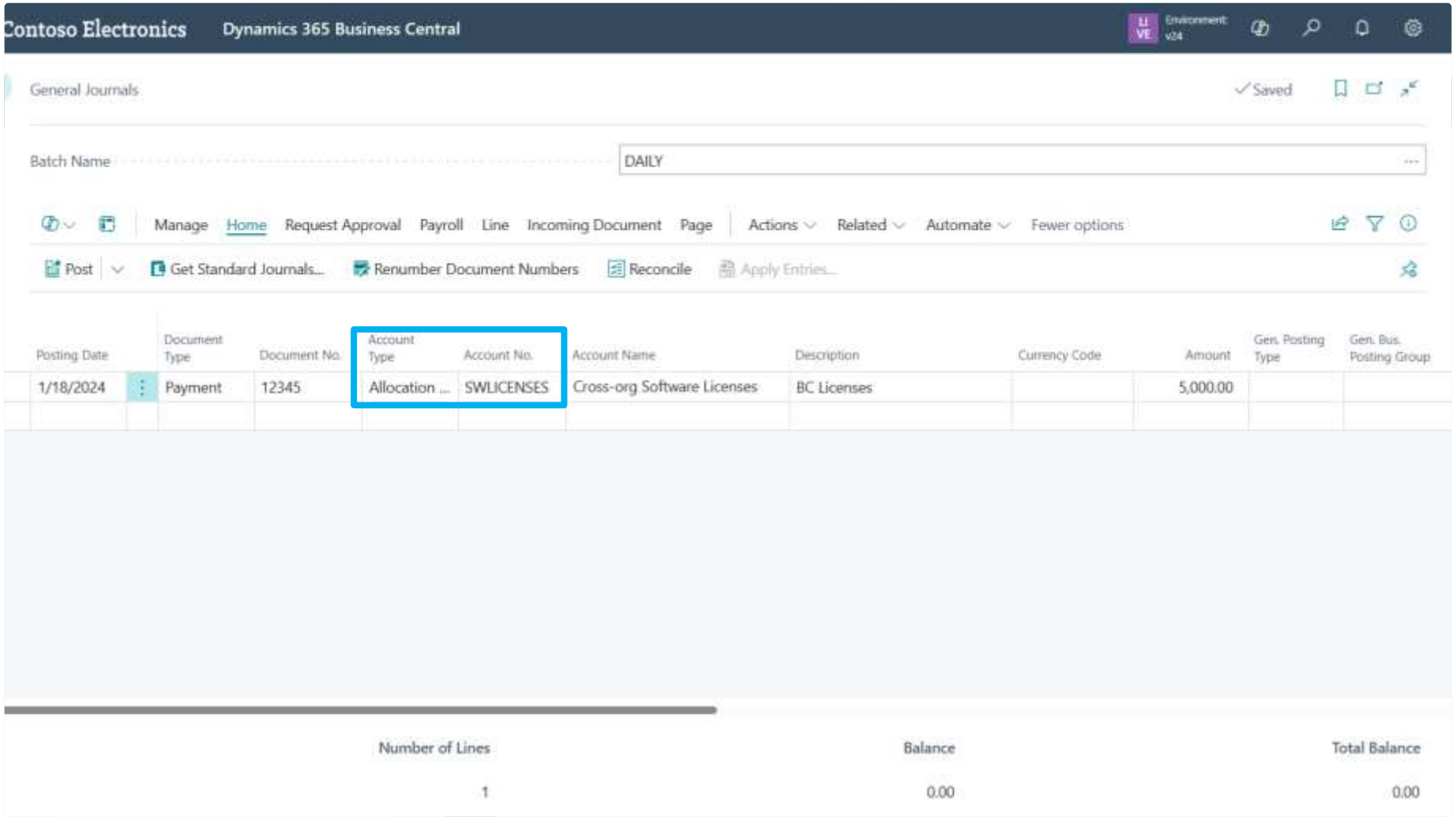
#28: Use Allocation Accounts to easily allocate expenses



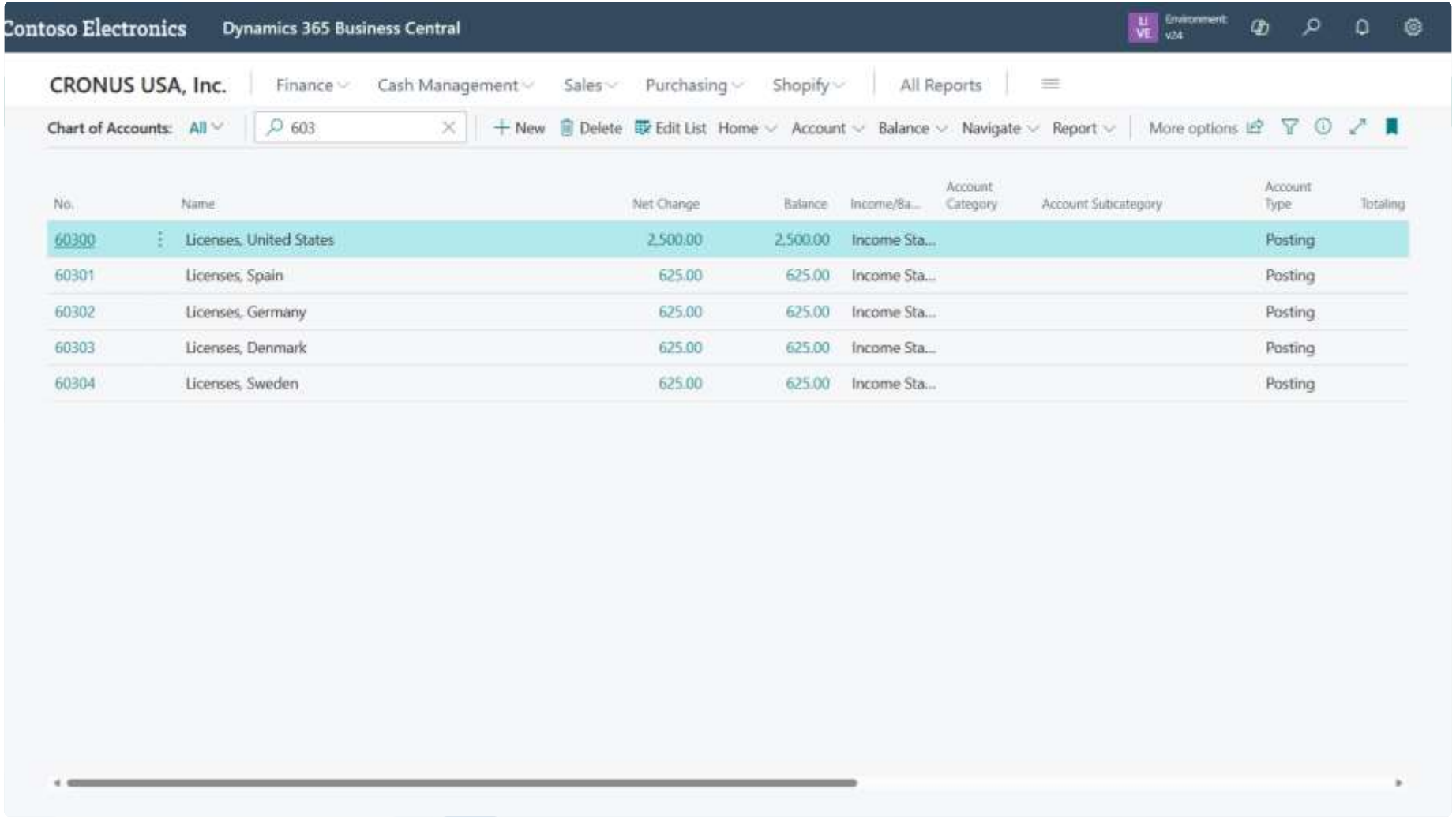
#28: Use Allocation Accounts to easily allocate expenses



#28: Use Allocation Accounts to easily allocate expenses



#28: Use Allocation Accounts to easily allocate expenses





Tip # 29

#29: Read Access from Teams License

Requirements for individual users to access data in Teams

- Data must be accessed using the Business Central app for Teams. Users must have the Business Central app for Teams installed and must use one of the supported Teams clients. Get a list of Teams clients supported by Business Central in Minimum Requirements for Using Business Central.
- Users must be internal to the organization. A user identity originates from the same home tenant where Business Central is deployed and access is enabled. External identities aren't supported. Business Central automatically prevents access to guests.
- Users must be assigned a Microsoft 365 license from one of the following plans.

Expand table

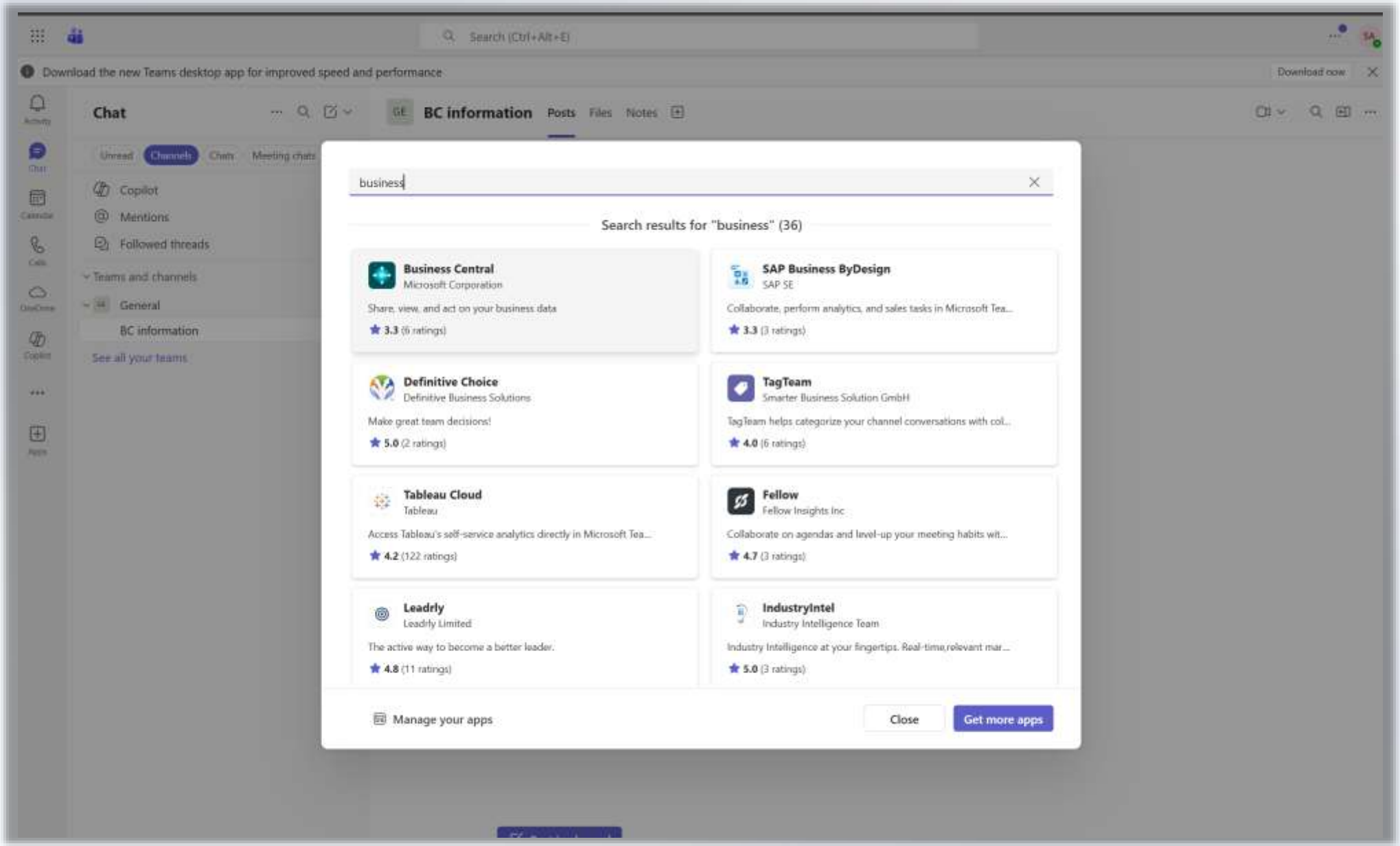
Supported plan	Product ID
Microsoft 365 Business Basic	3b555118-da6a-4418-894f-7df1e2096870
Microsoft 365 Business Standard	f245ecc8-75af-4f8e-b61f-27d8114de5f3
Microsoft 365 Business Premium	cbdc14ab-d96c-4c30-b9f4-6ada7cdc1d46
Microsoft 365 E3	05e9a617-0261-4cee-bb44-138d3ef5d965
Microsoft 365 E5	06ebc4ee-1bb5-47dd-8120-11324bc54e06
Microsoft 365 F1	50f60901-3181-4b75-8a2c-4c8e4c1d5a72
Microsoft 365 F3	66b55226-6b4f-492c-910c-a3b7a3c9d993
Office 365 E1	18181a46-0d4e-45cd-891e-60aabd171b4e
Office 365 E2	6634e0ce-1a9f-428c-a498-f84ec7b8aa2e
Office 365 E3	6fd2c87f-b296-42f0-b197-1e91e994b900
Office 365 E5	c7df2760-2c81-4ef7-b578-5b5392b571df
Office 365 F2	131fd665-5752-4995-a628-bcba5c889745
Office 365 F3	4b585984-651b-448a-9e53-3b10f069cf7f
Microsoft Teams Essentials (Microsoft Entra Identity)	3ab6abff-666f-4424-bfb7-f0bc274ec7bc
Microsoft Teams EEA	7e74bd05-2c47-404e-829a-ba95c66fe8e5

Business Central Access with Microsoft 365 Licenses - Business Central | Microsoft Learn

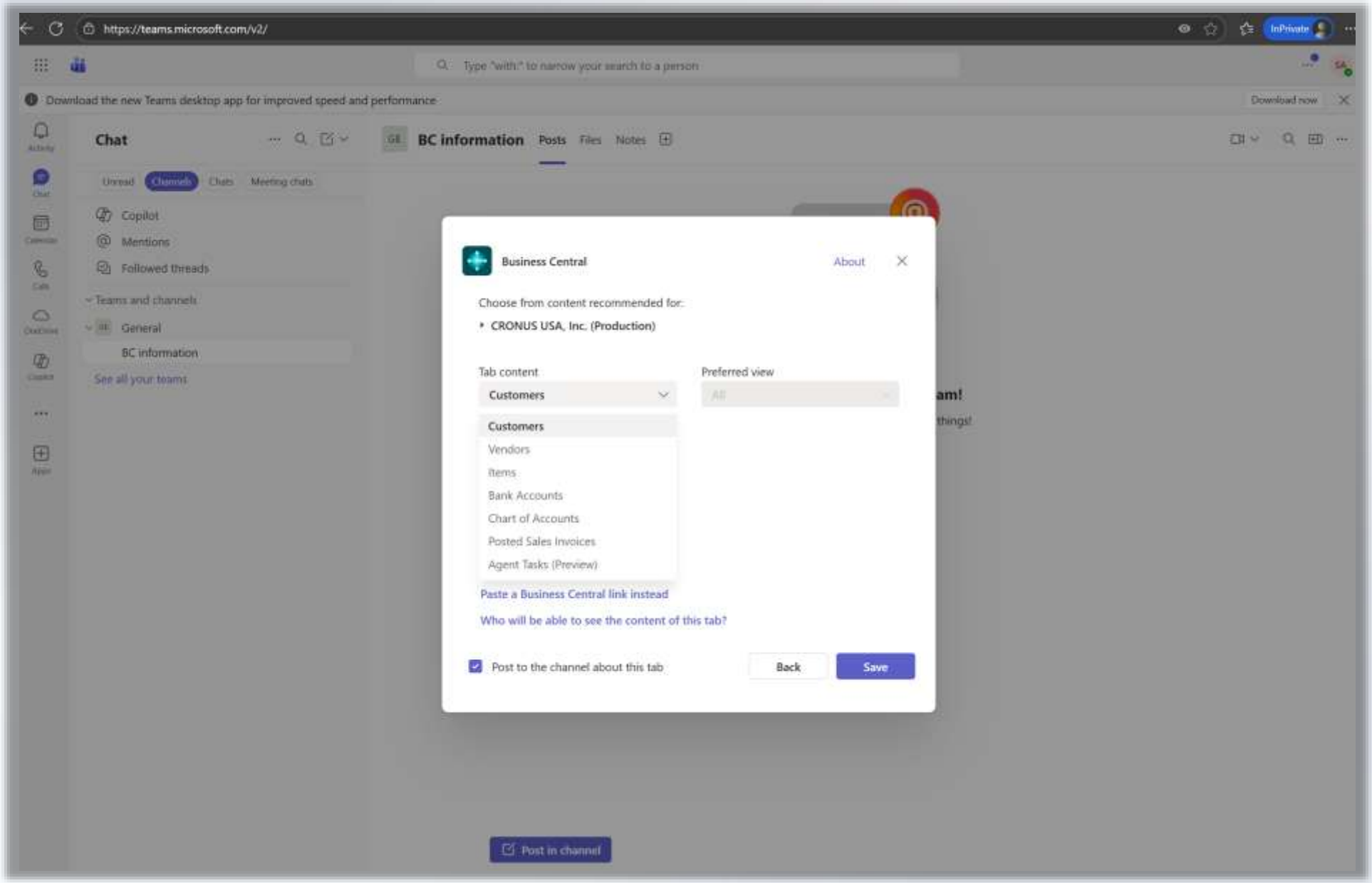


Tip # 30

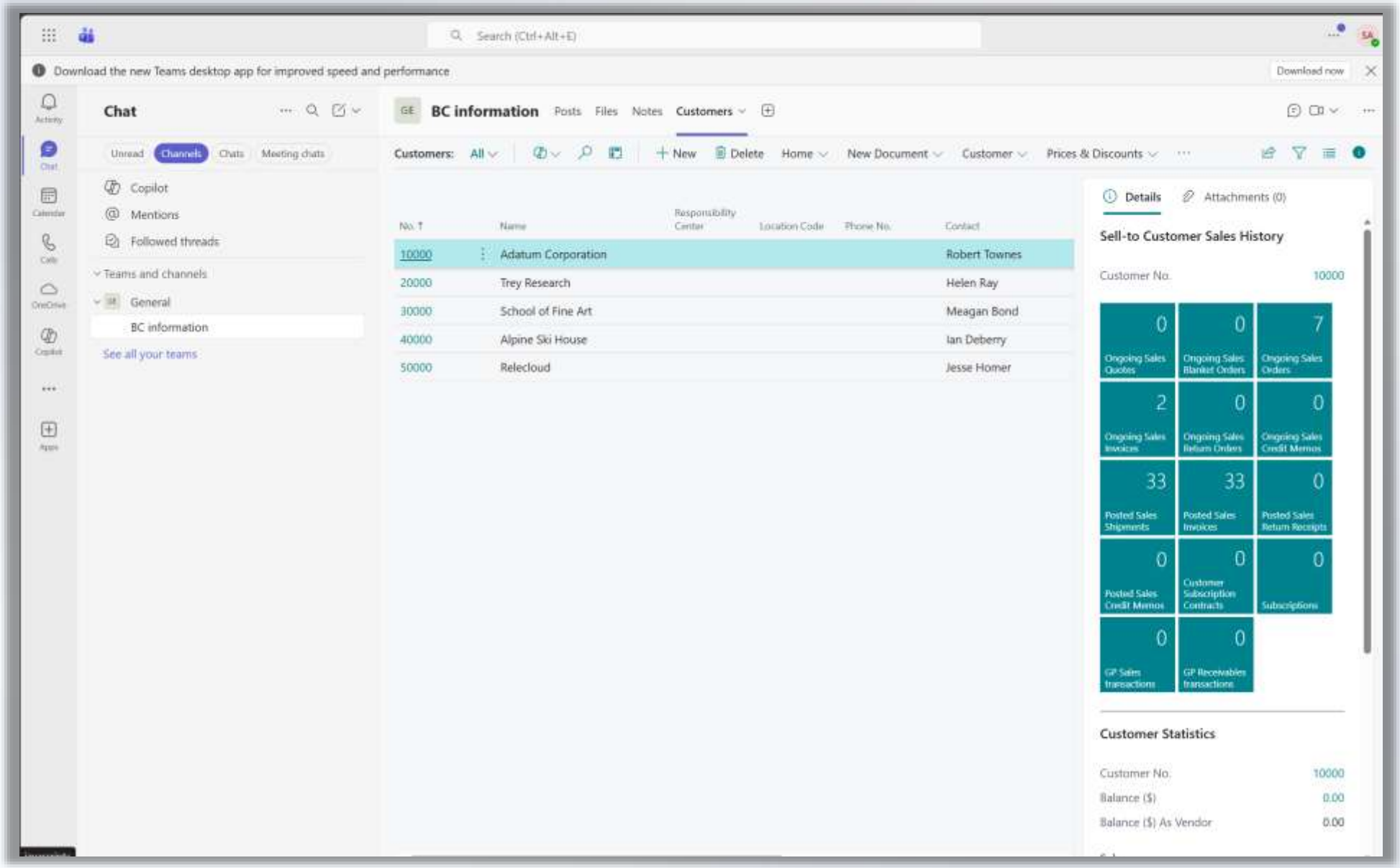
#30: BC data in Teams



#30: BC data in Teams



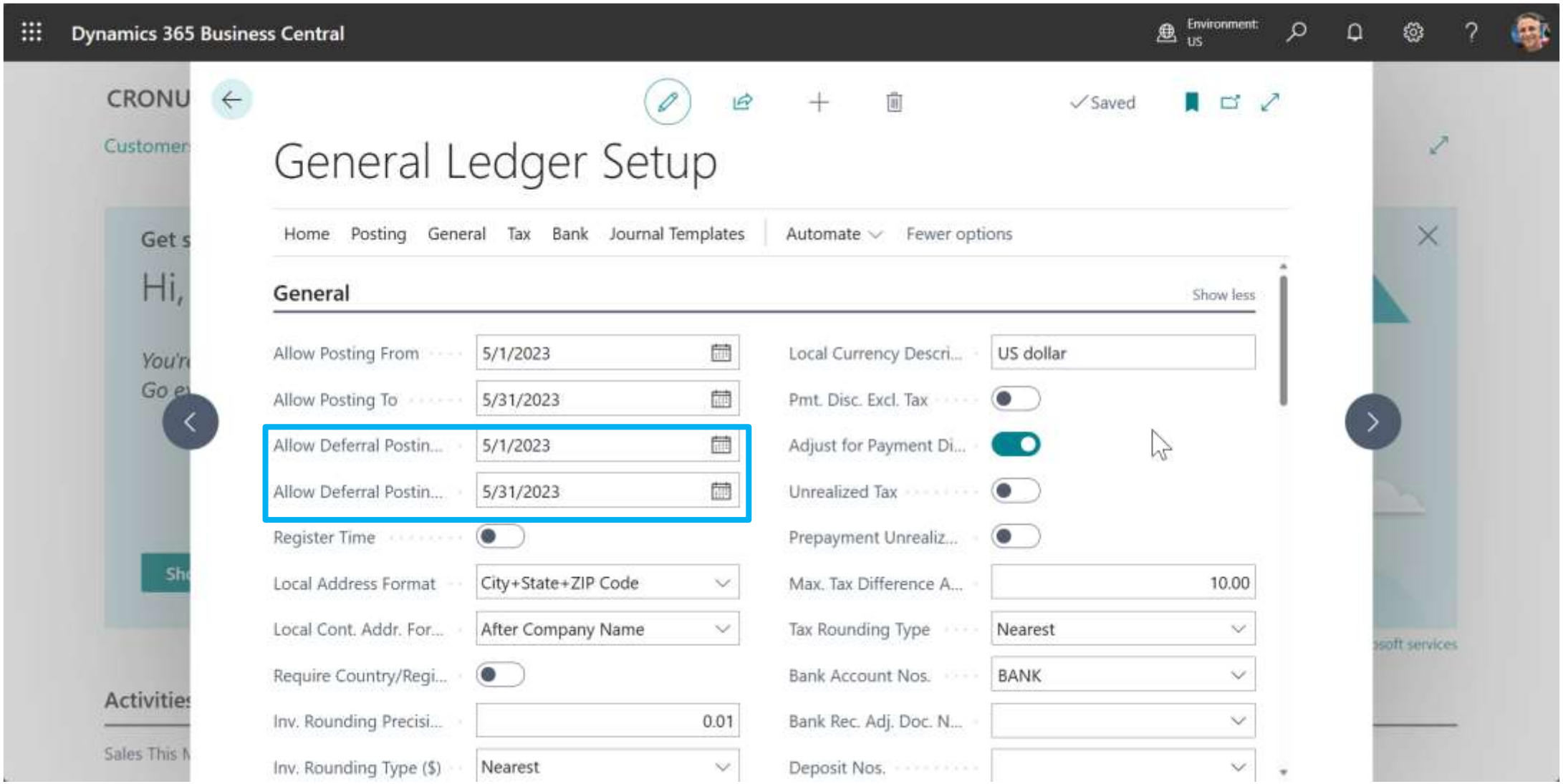
#30: BC data in Teams



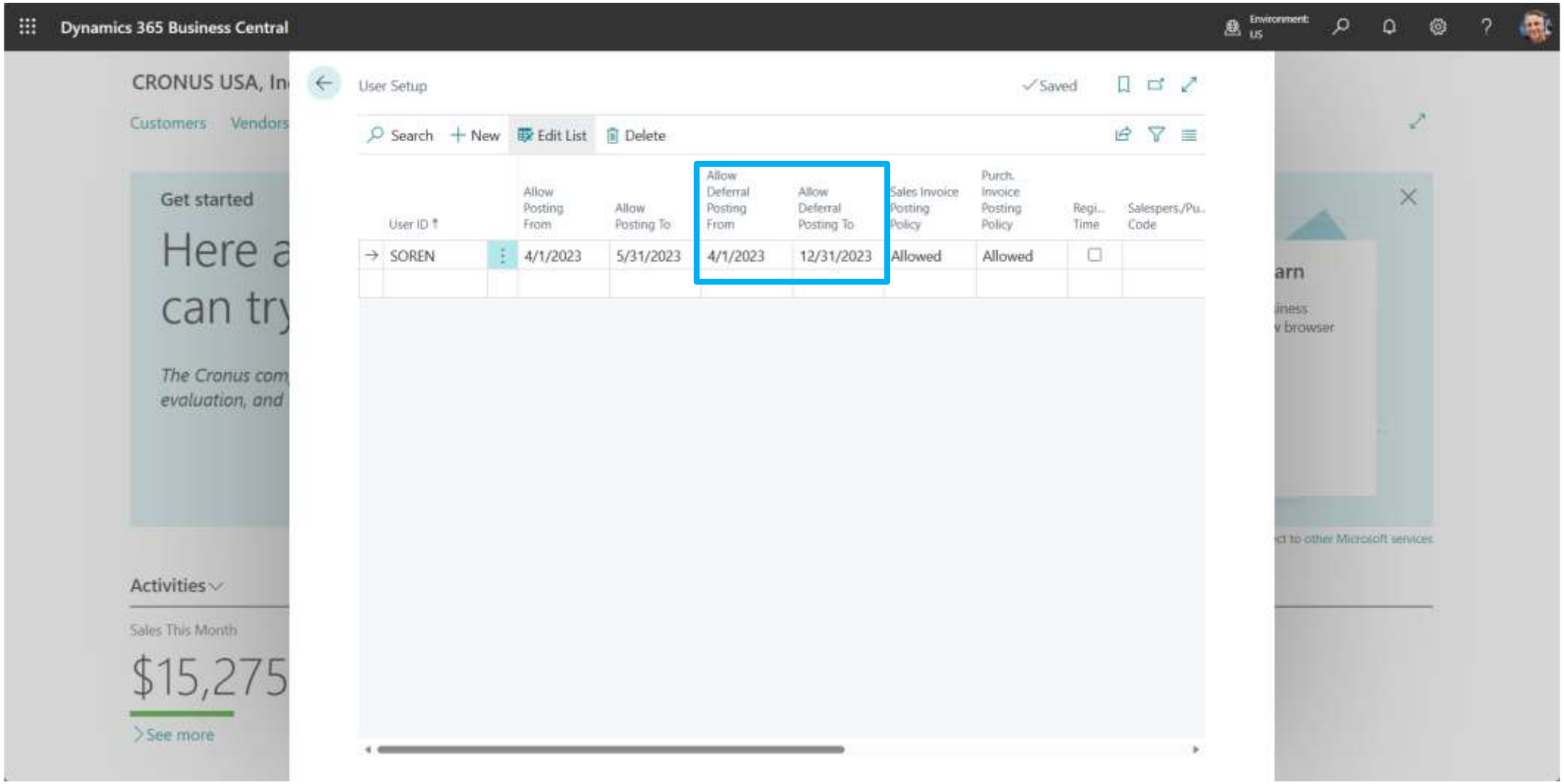


Tip # 31

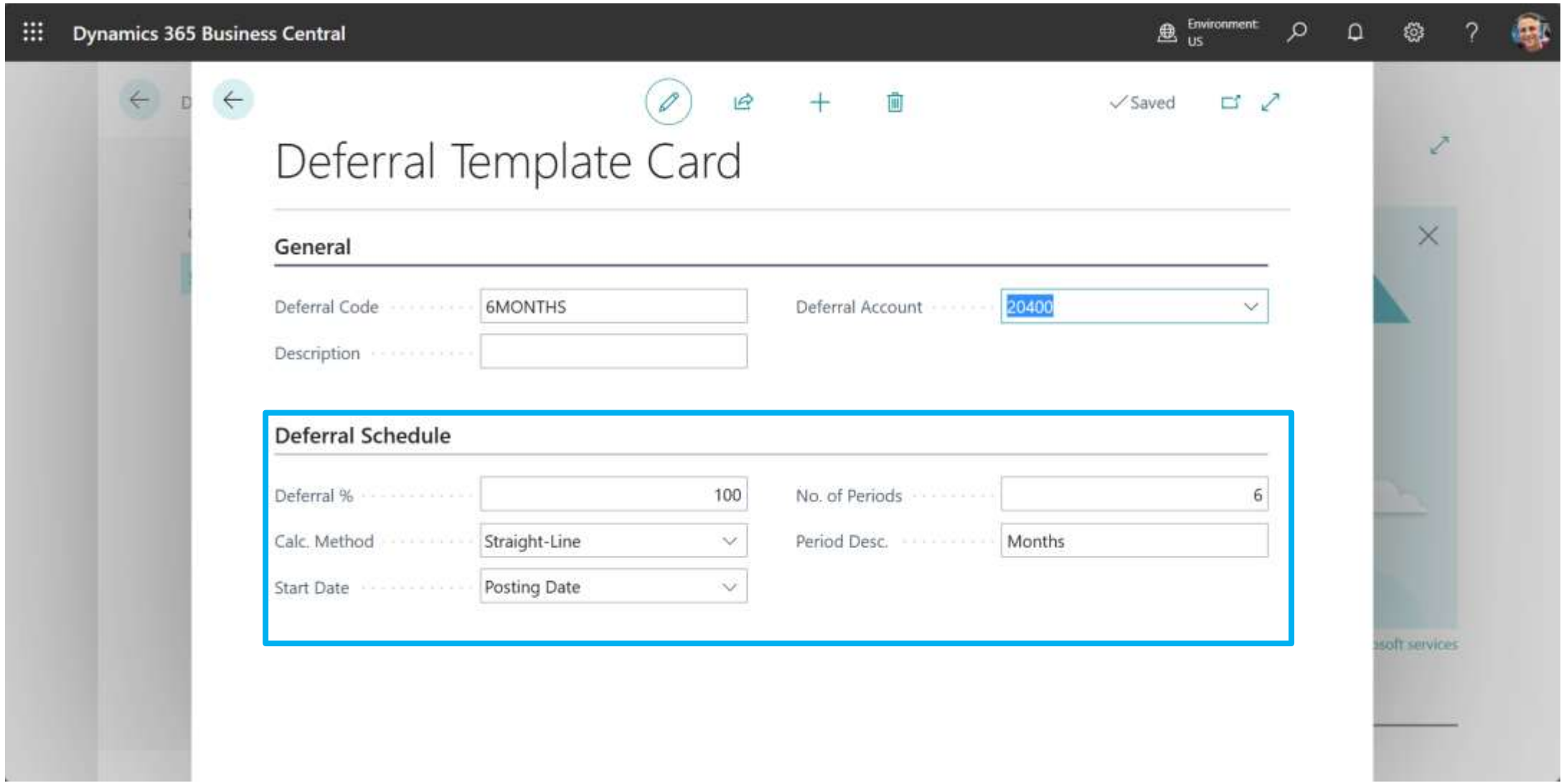
#31: Governing deferred revenue & expenses



#31: Governing deferred revenue & expenses

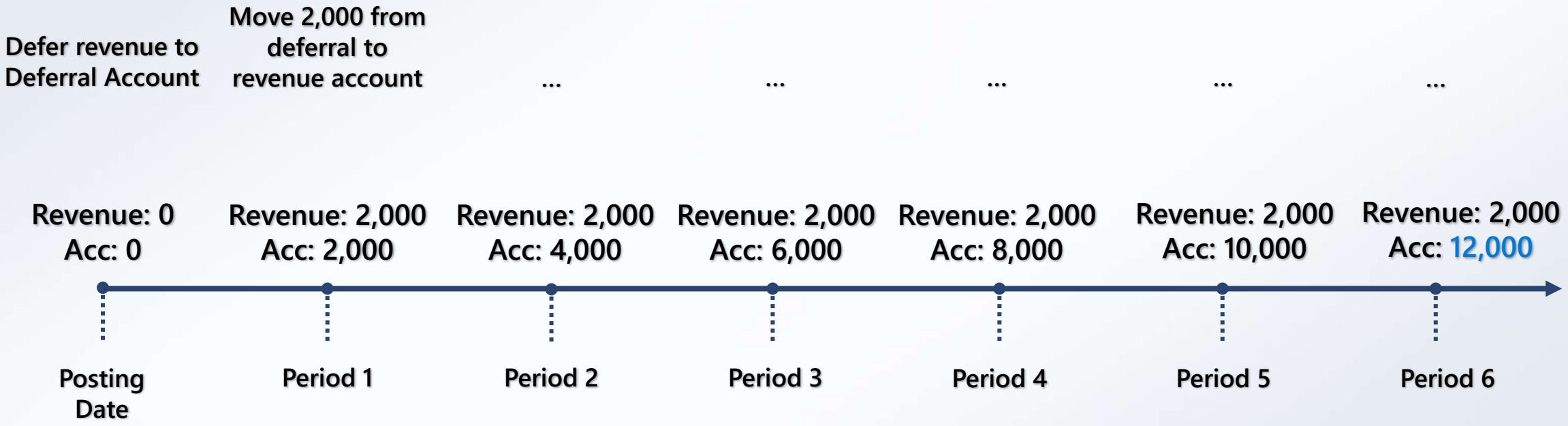


#31: Governing deferred revenue & expenses



Deferring revenue example

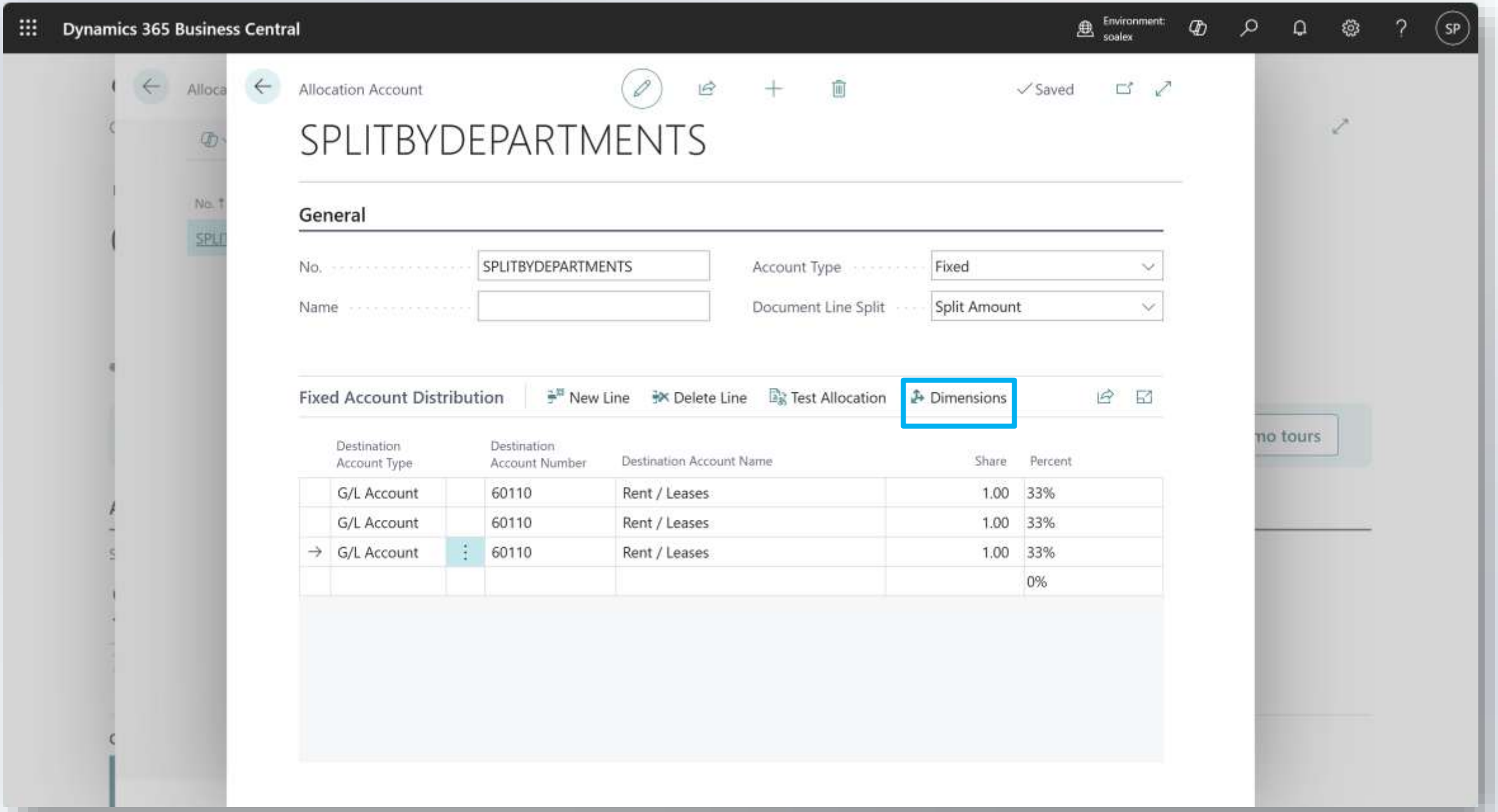
Invoice service delivery of 12,000
Service is being delivered in a 6-month period



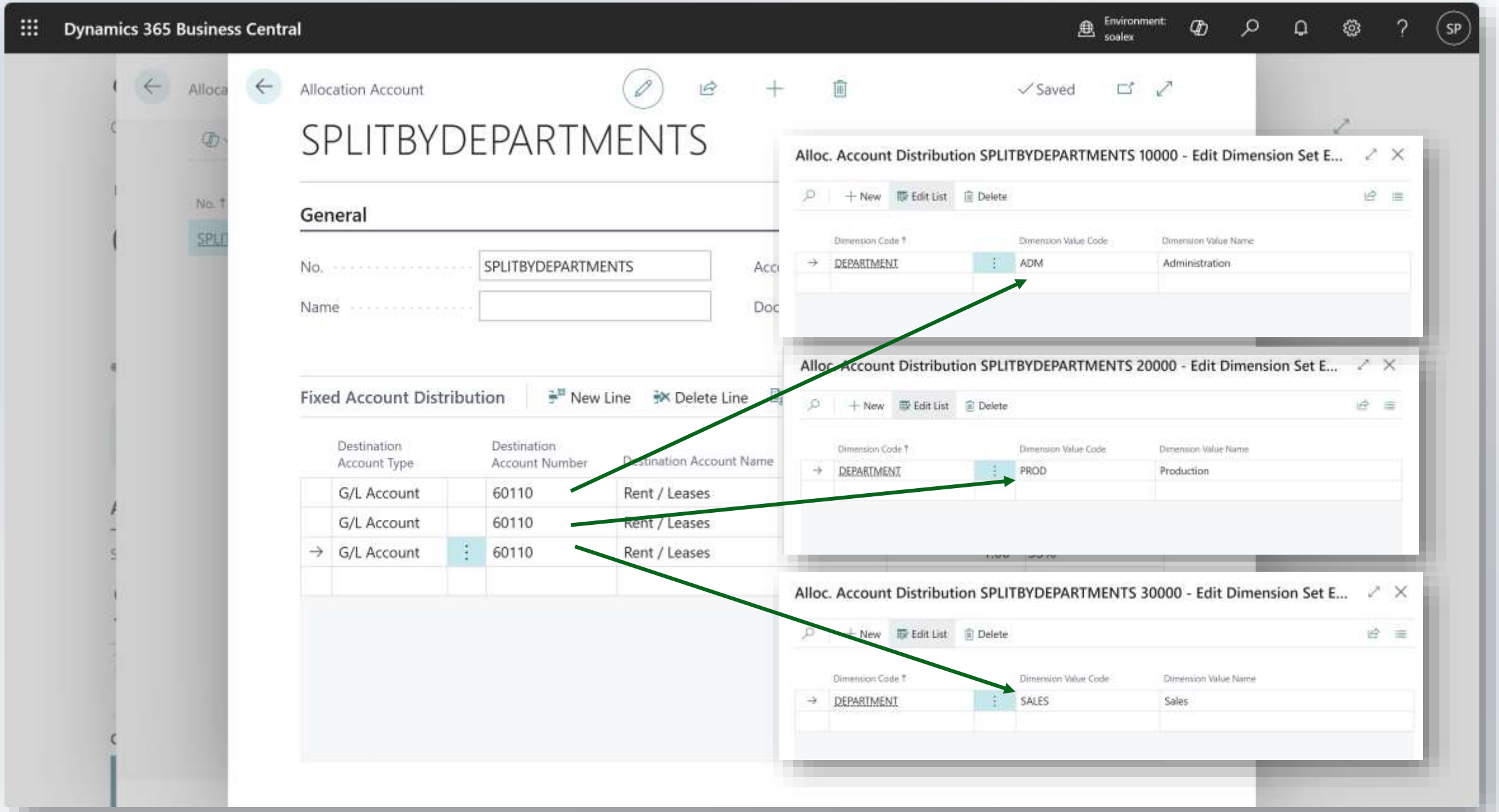


Tip # 32

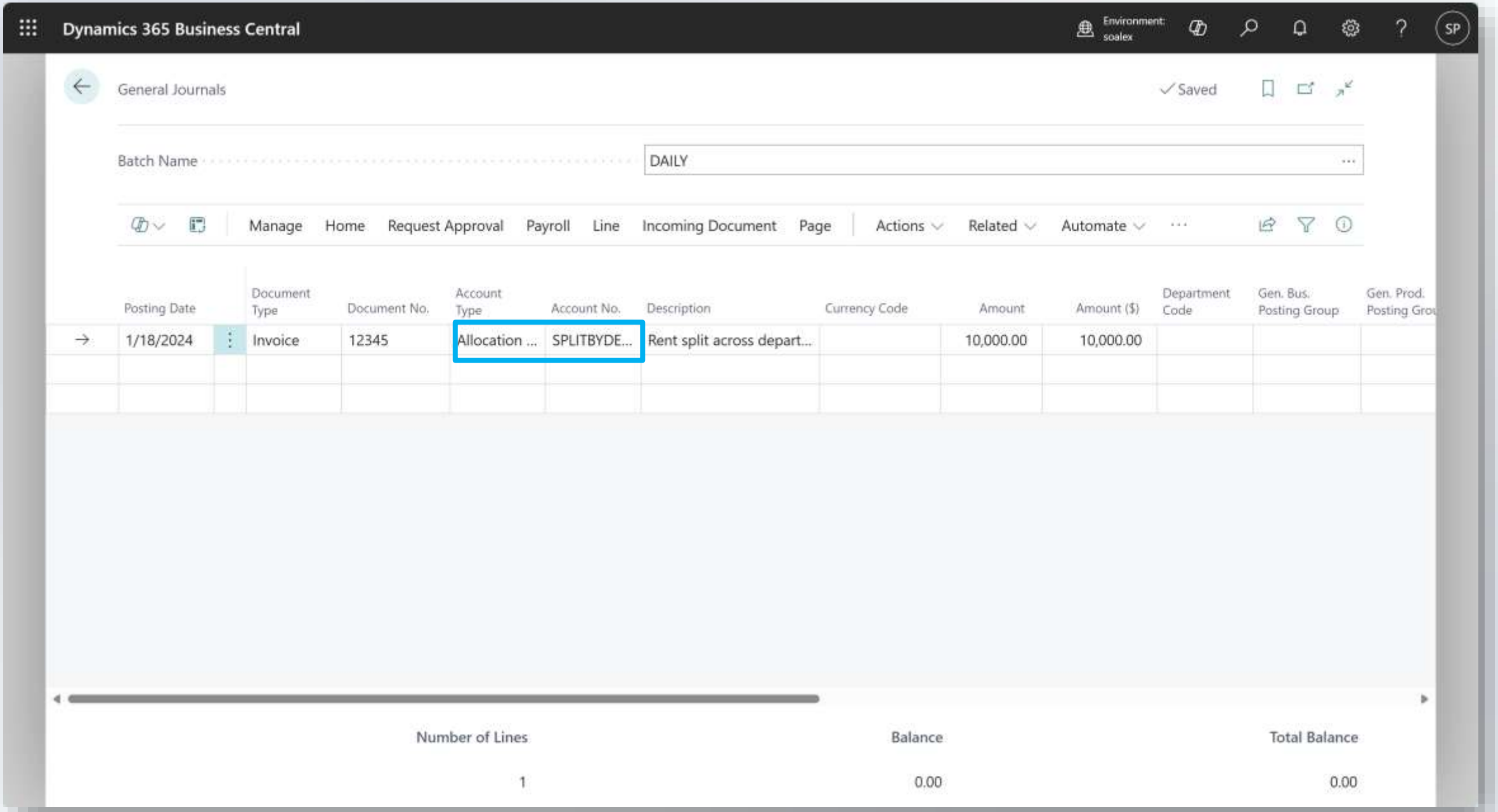
#32: Expand allocation account before posting



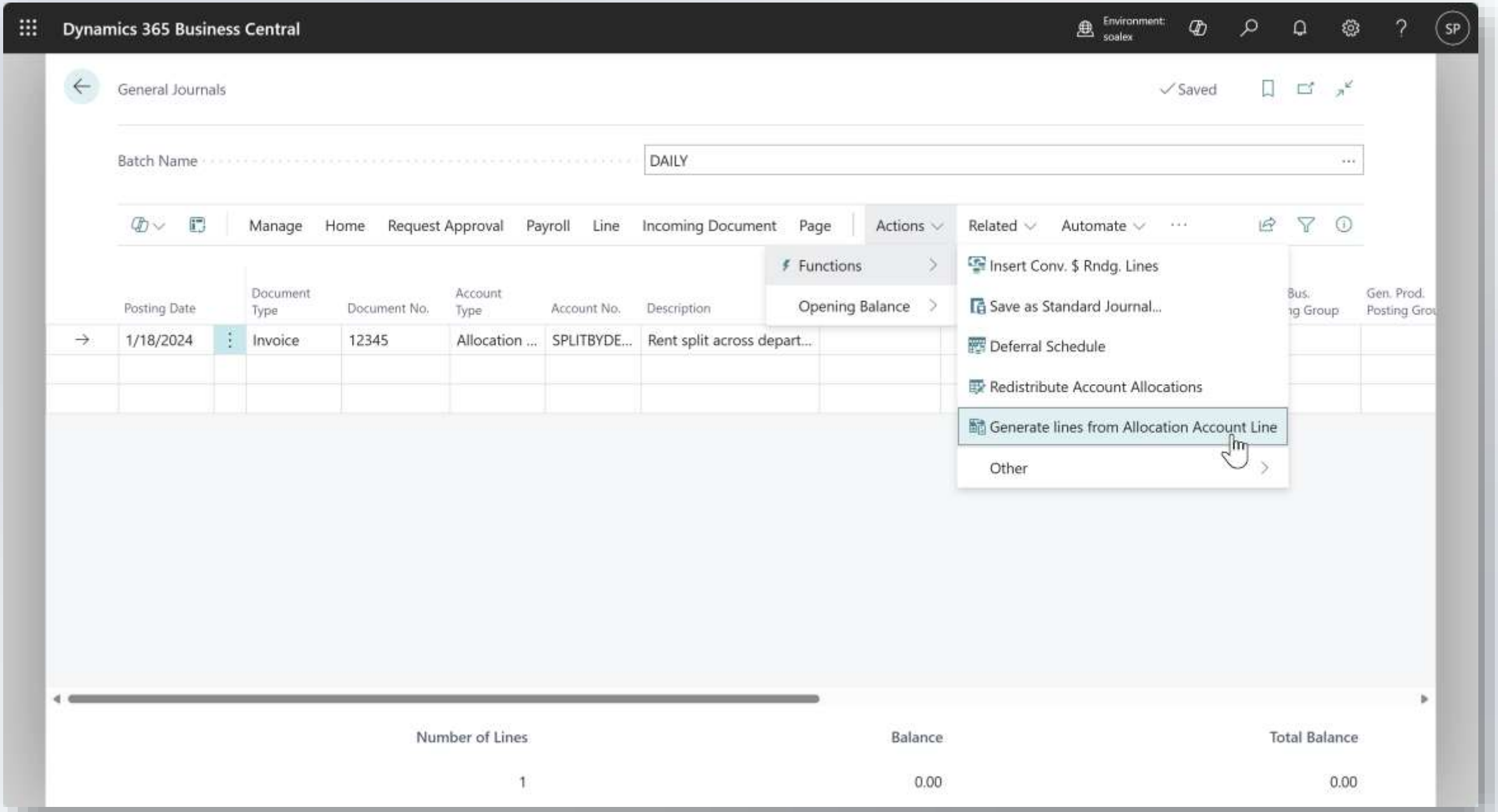
#32: Expand allocation account before posting



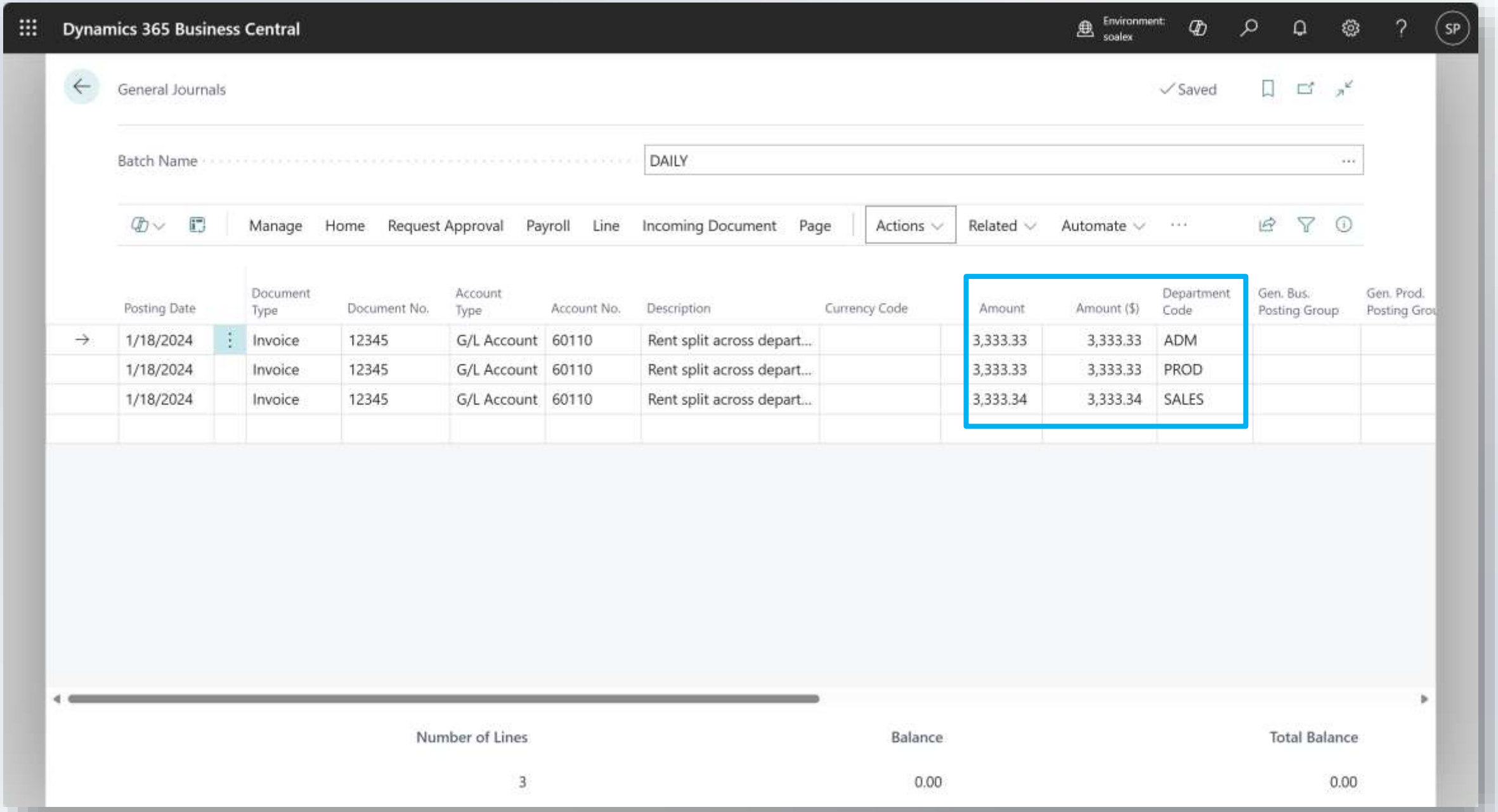
#32: Expand allocation account before posting



#32: Expand allocation account before posting



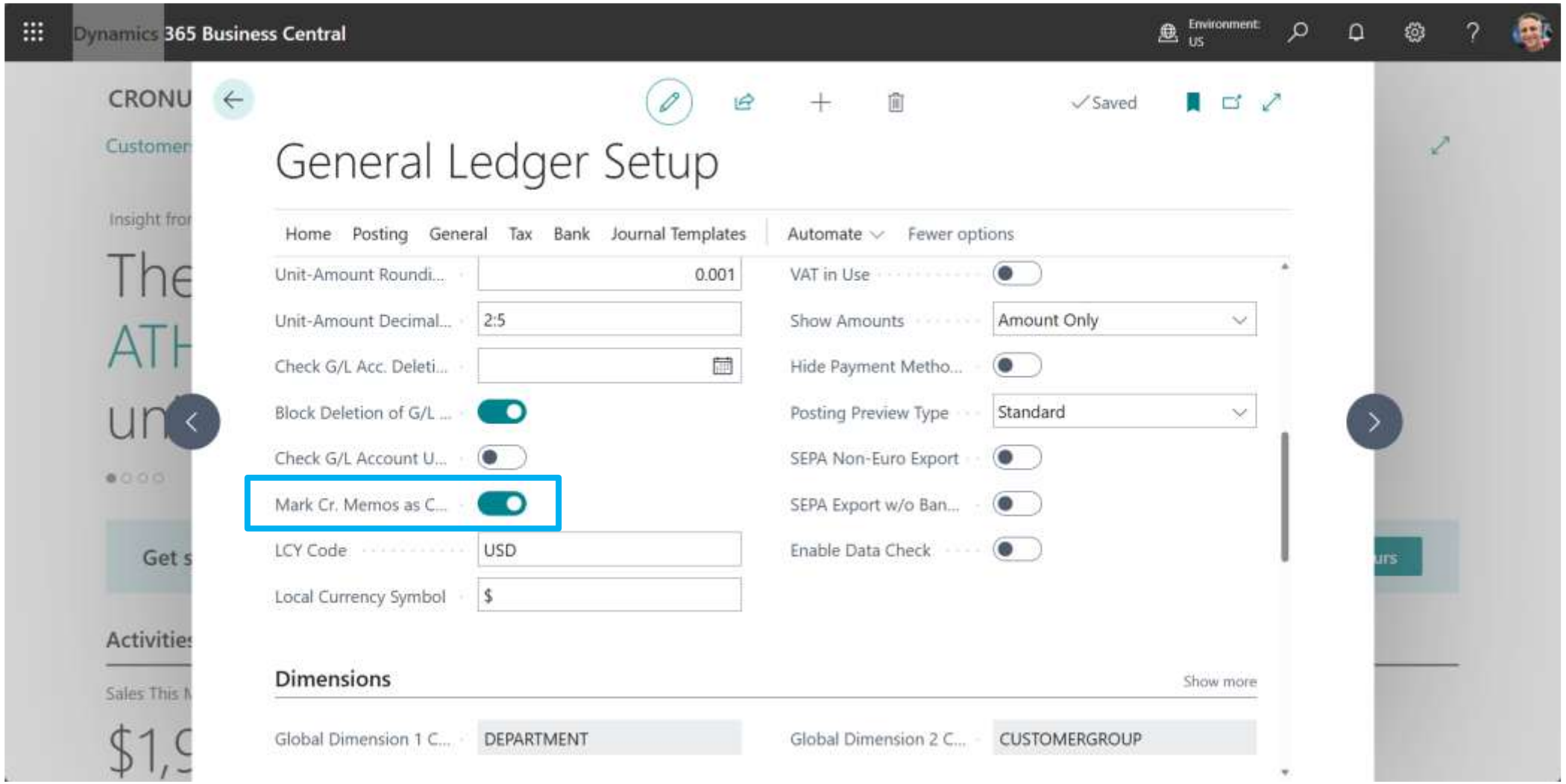
#32: Expand allocation account before posting





Tip # 33

#33: Credit Memos posted as debit or credit



What?

"Mark Cr. Memo as Correction"
disabled

	Debit	Credit	
Invoice	1,000		
		1,000	Cr. Memo

Customer account

"Mark Cr. Memo as Correction"
enabled

	Debit	Credit
Invoice	1,000	
Cr. Memo	-1,000	

Customer account

Some countries have this regulatory requirement

NEW



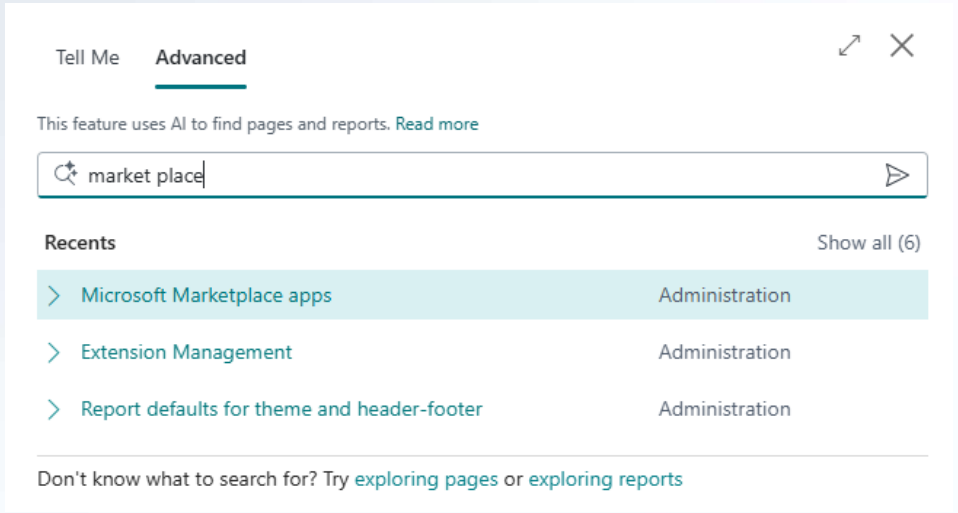
Tip # 34

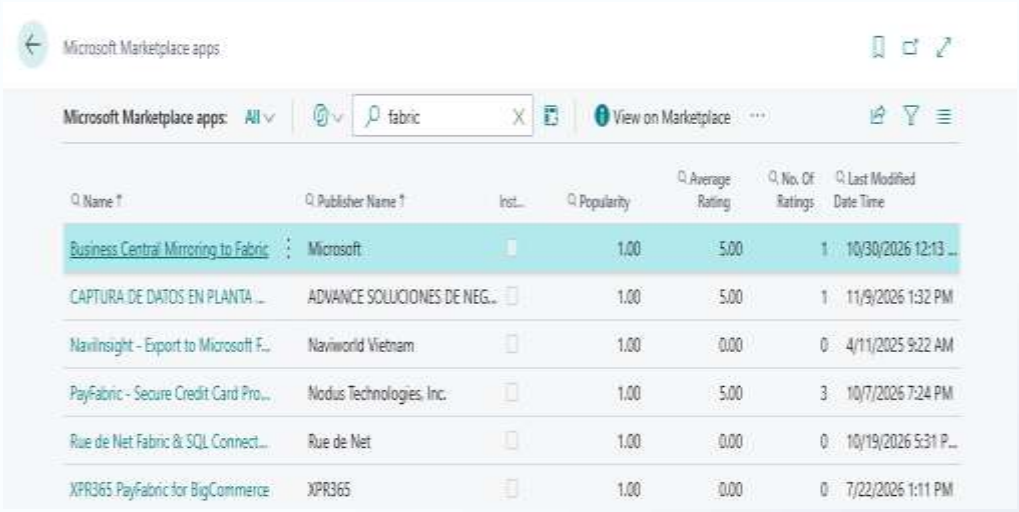
#34: Synchronize with Fabric (Datalake)

Its as easy as 1, 2, 3…

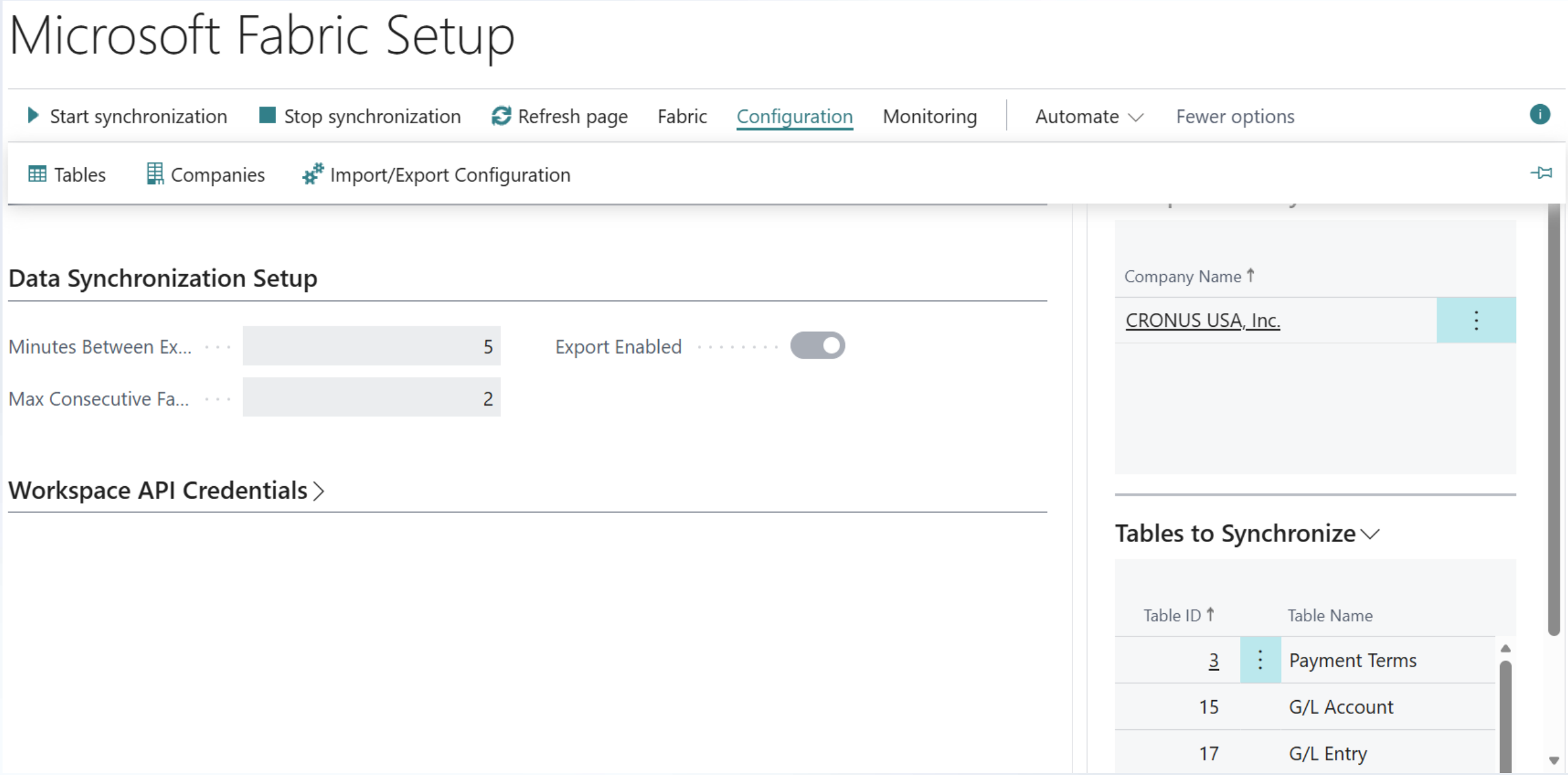
1. Setup a mirroring database in Fabric
2. Connect to Business Central
3. Choose tables and companies

#34: Synchronize with Fabric (Datalake)





#34: Synchronize with Fabric (Datalake)



#34: Synchronize with Fabric (Datalake)

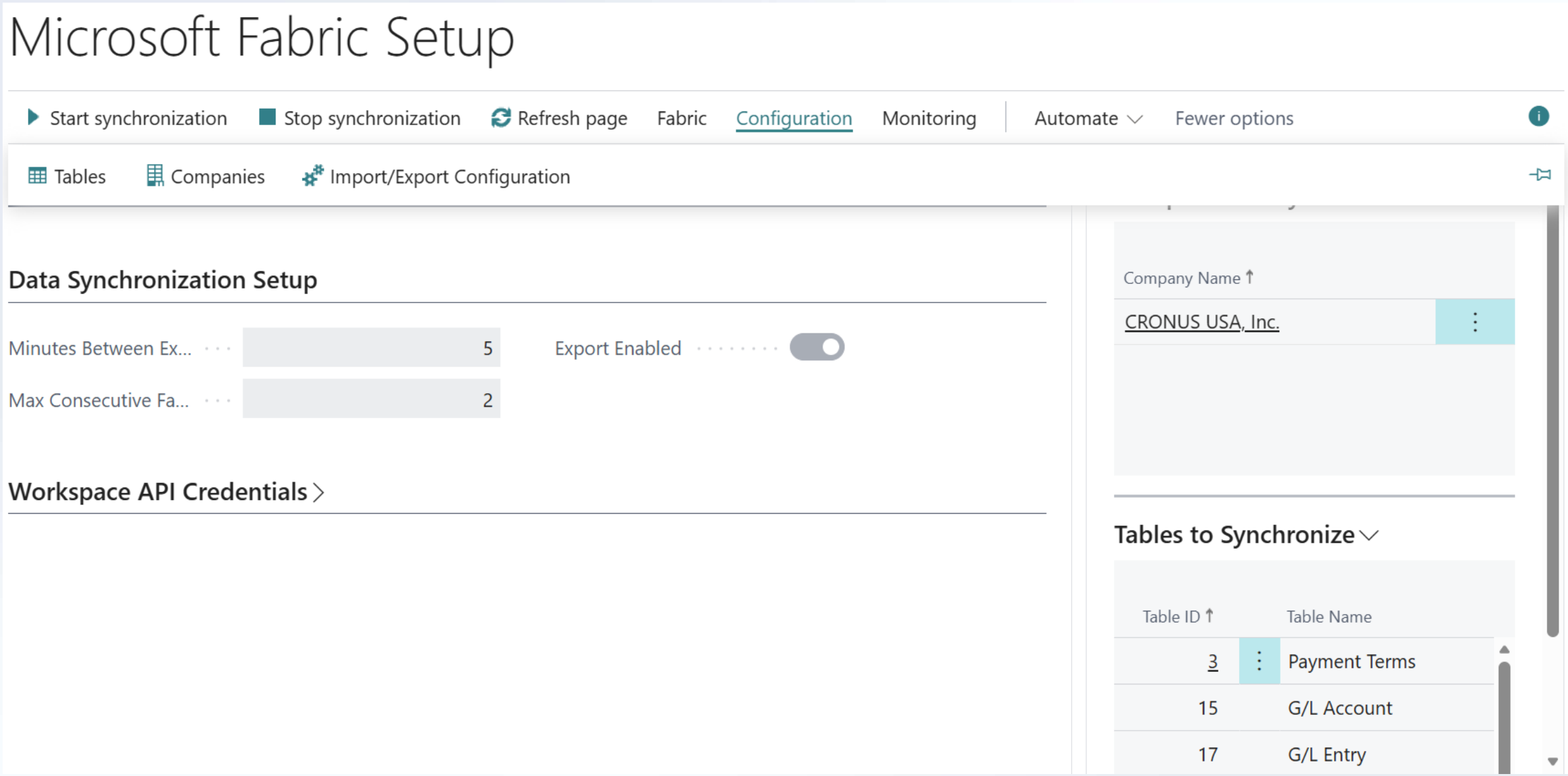
Fabric Table Configuration

Saved

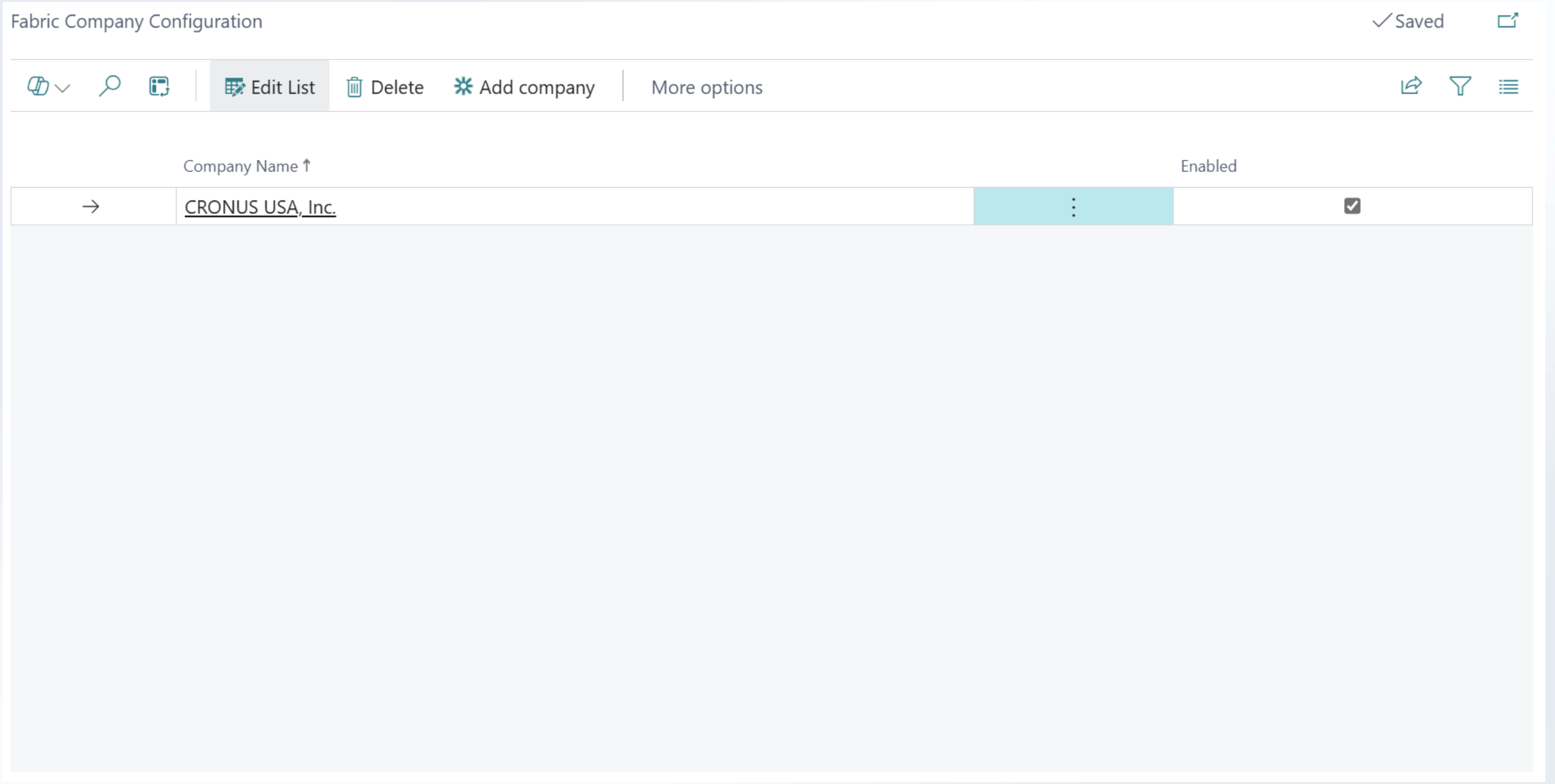
Edit List | Delete | Add table | Automate | Fewer options

	Table ID ↑		Table Name	Per Company	Fabric Entity Name	Fabric Schema Type
→	3	⋮	Payment Terms	☑	payment_terms	Data
	15		G/L Account	☑	g_l_account	Data
	17		G/L Entry	☑	g_l_entry	Data
	18		Customer	☑	customer	Data
	21		Cust. Ledger Entry	☑	cust__ledger_entry	Data
	23		Vendor	☑	vendor	Data
	25		Vendor Ledger Entry	☑	vendor_ledger_entry	Data

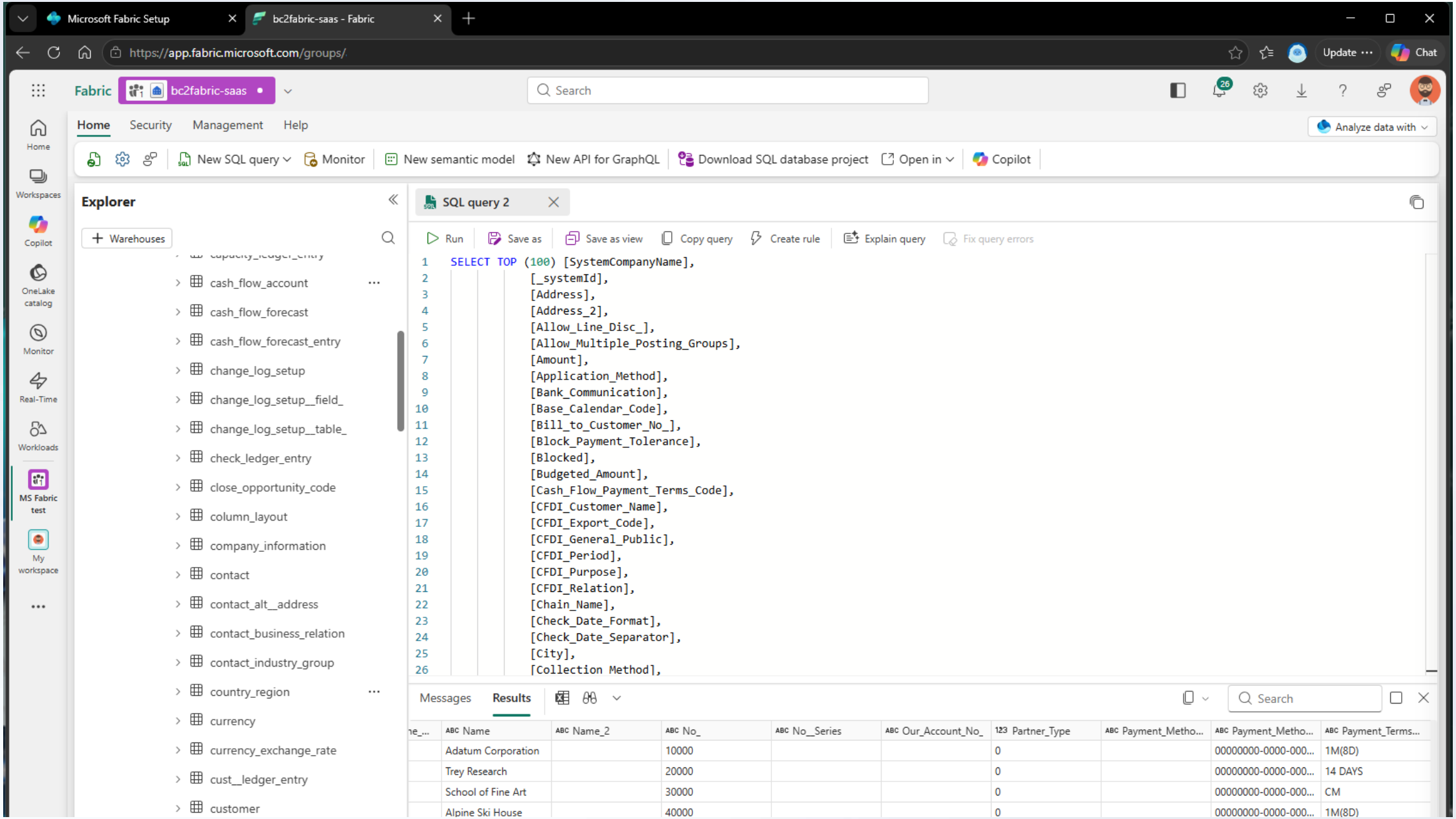
#34: Synchronize with Fabric (Datalake)



#34: Synchronize with Fabric (Datalake)



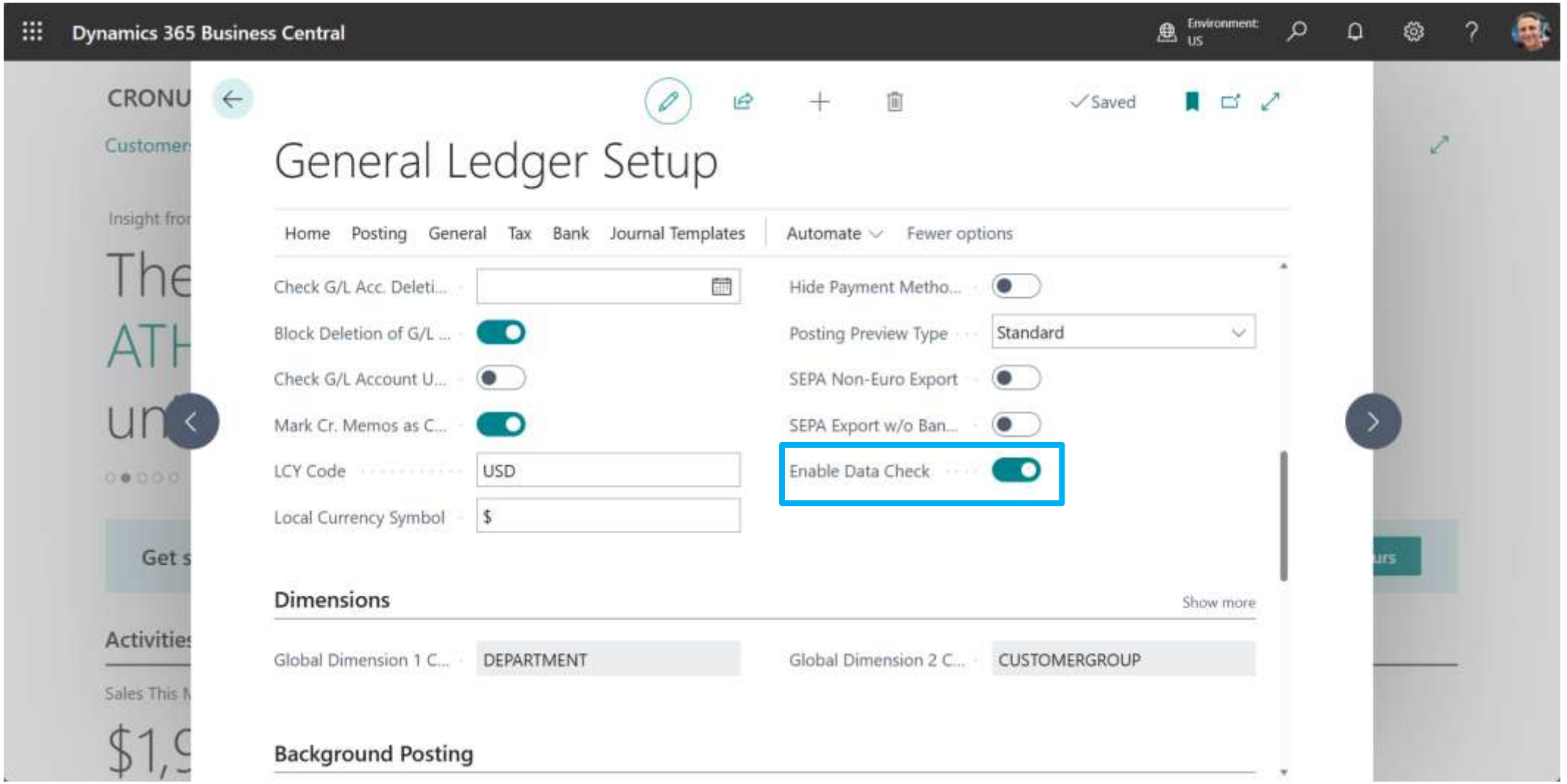
#34: Synchronize with Fabric (Datalake)



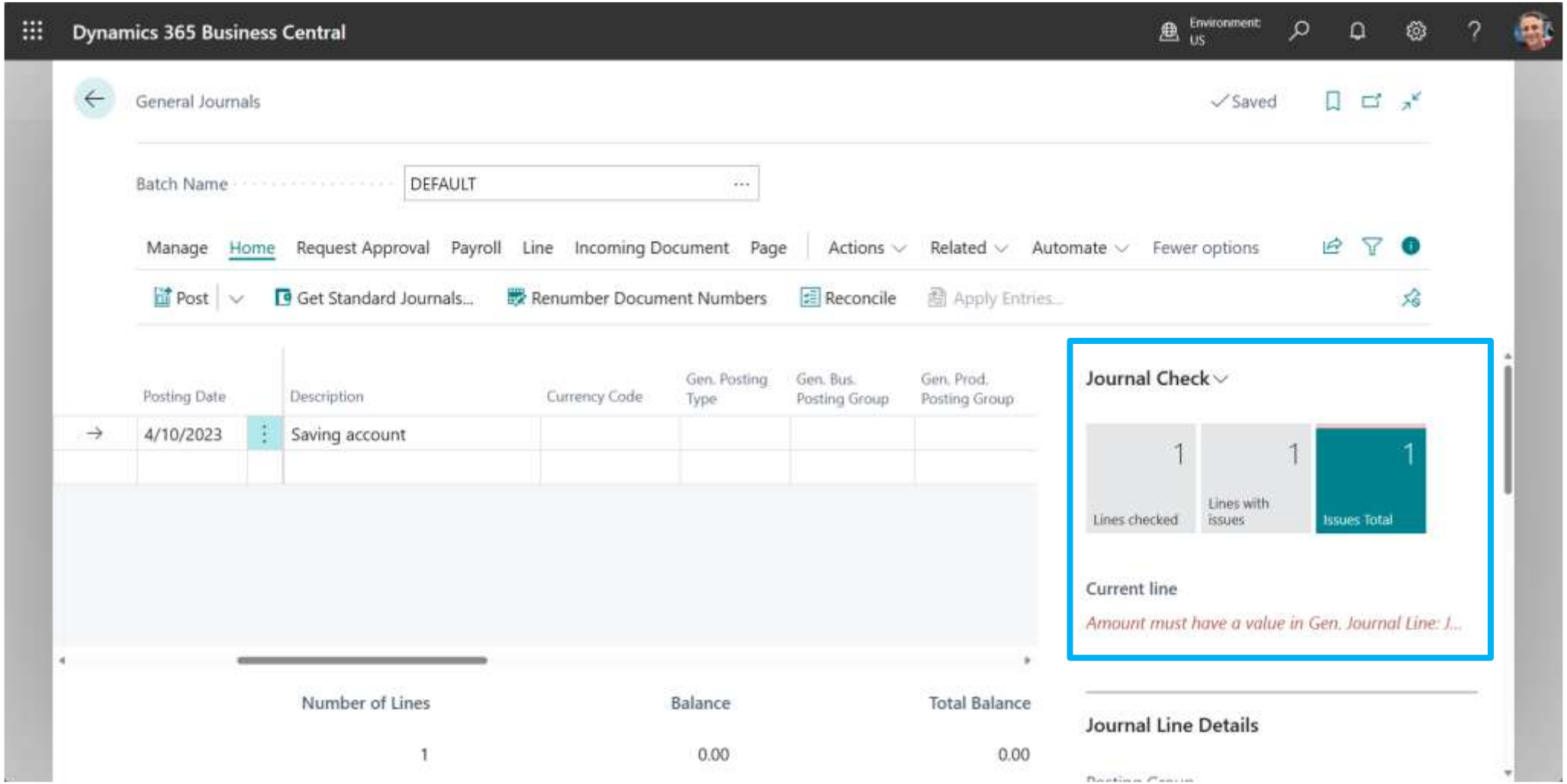


Tip # 35

#35: Resolve errors as you type



#35: Resolve errors as you type



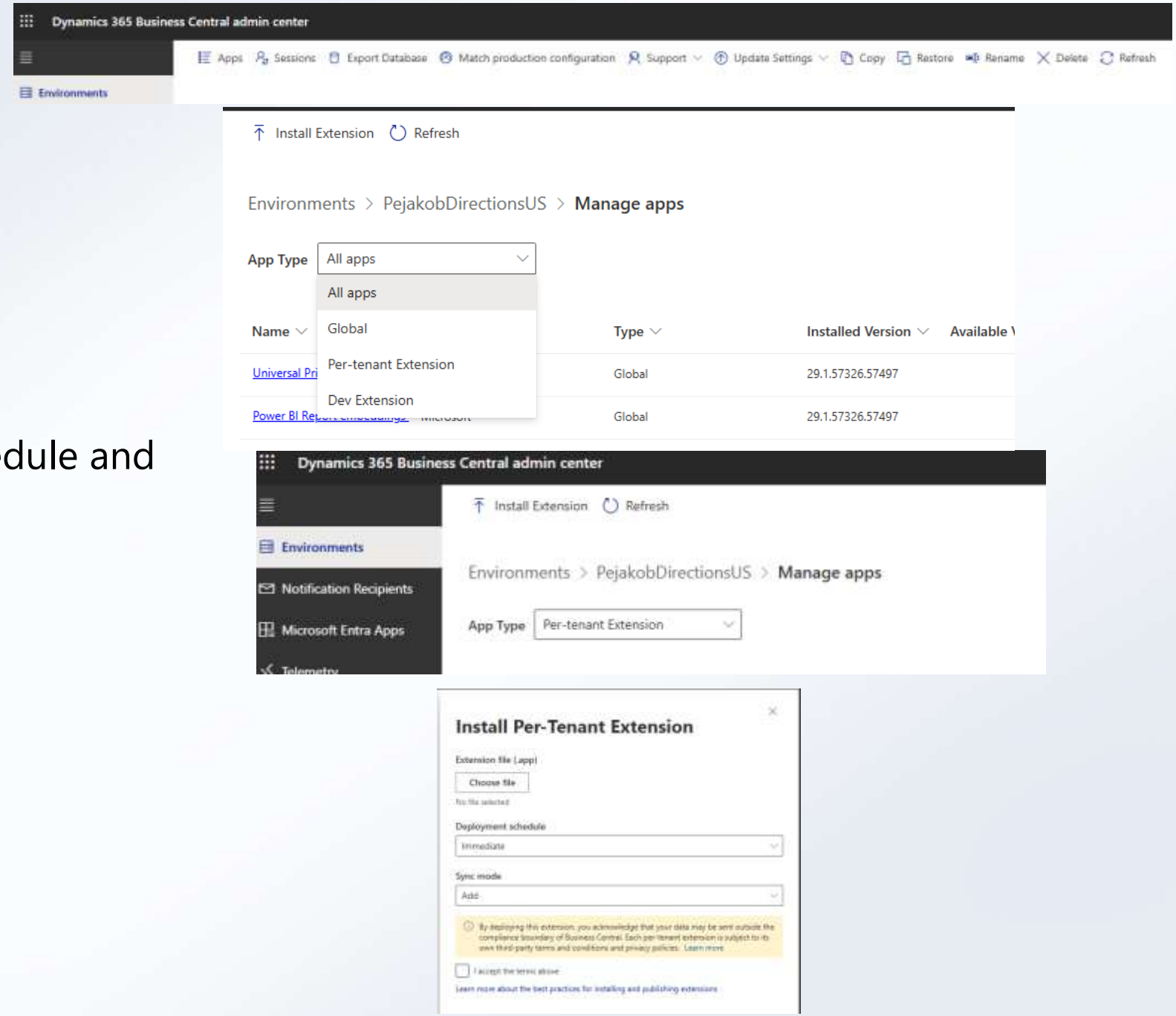
NEW



Tip # 36

#36: Manage PTE Extensions

- From Admin Center choose Apps
- Choose the type of extension
- Choose file and deployment schedule and sync mode



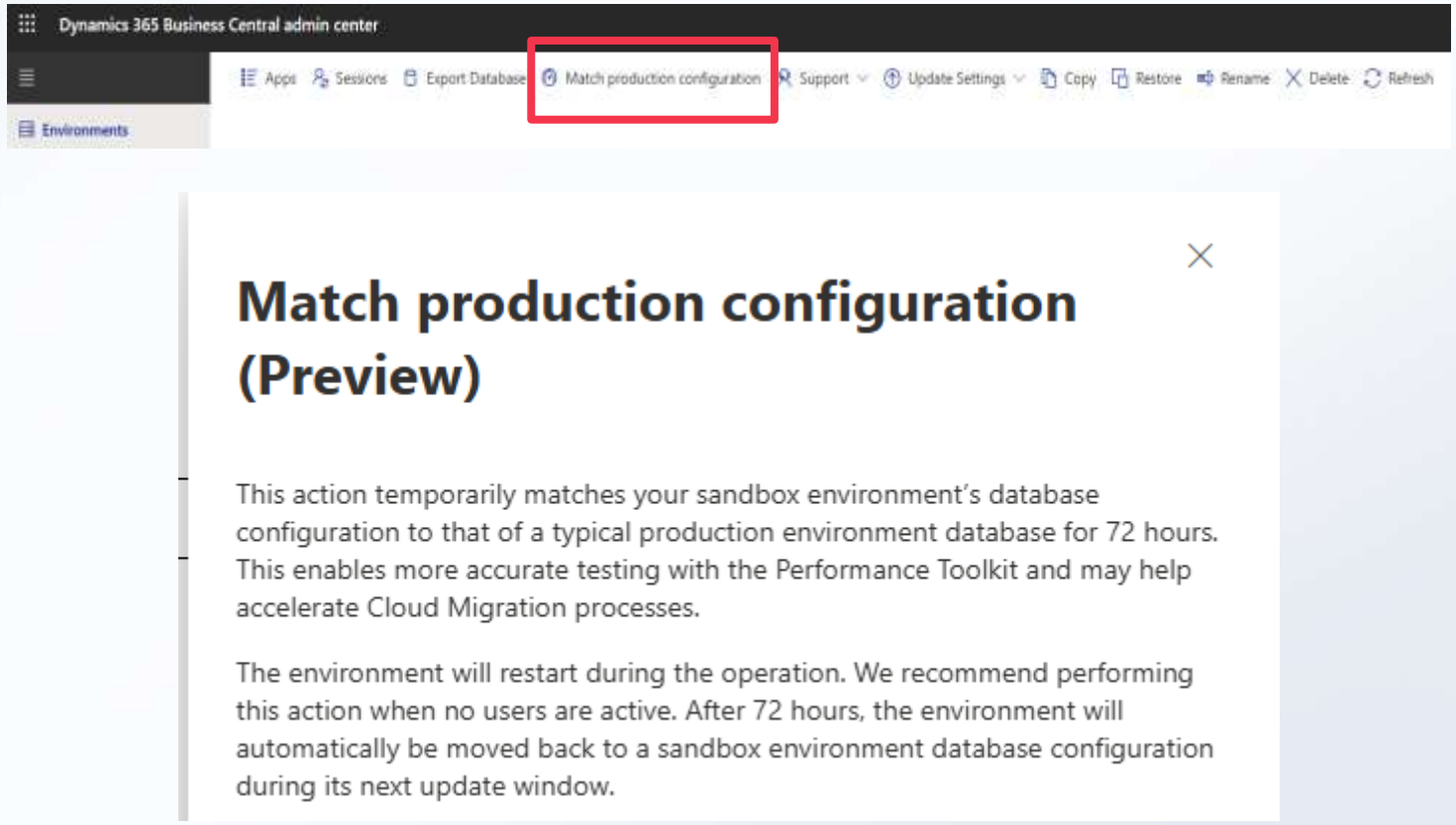
NEW



Tip # 37

#37: Elevate Sandbox to Production Environment (Preview)

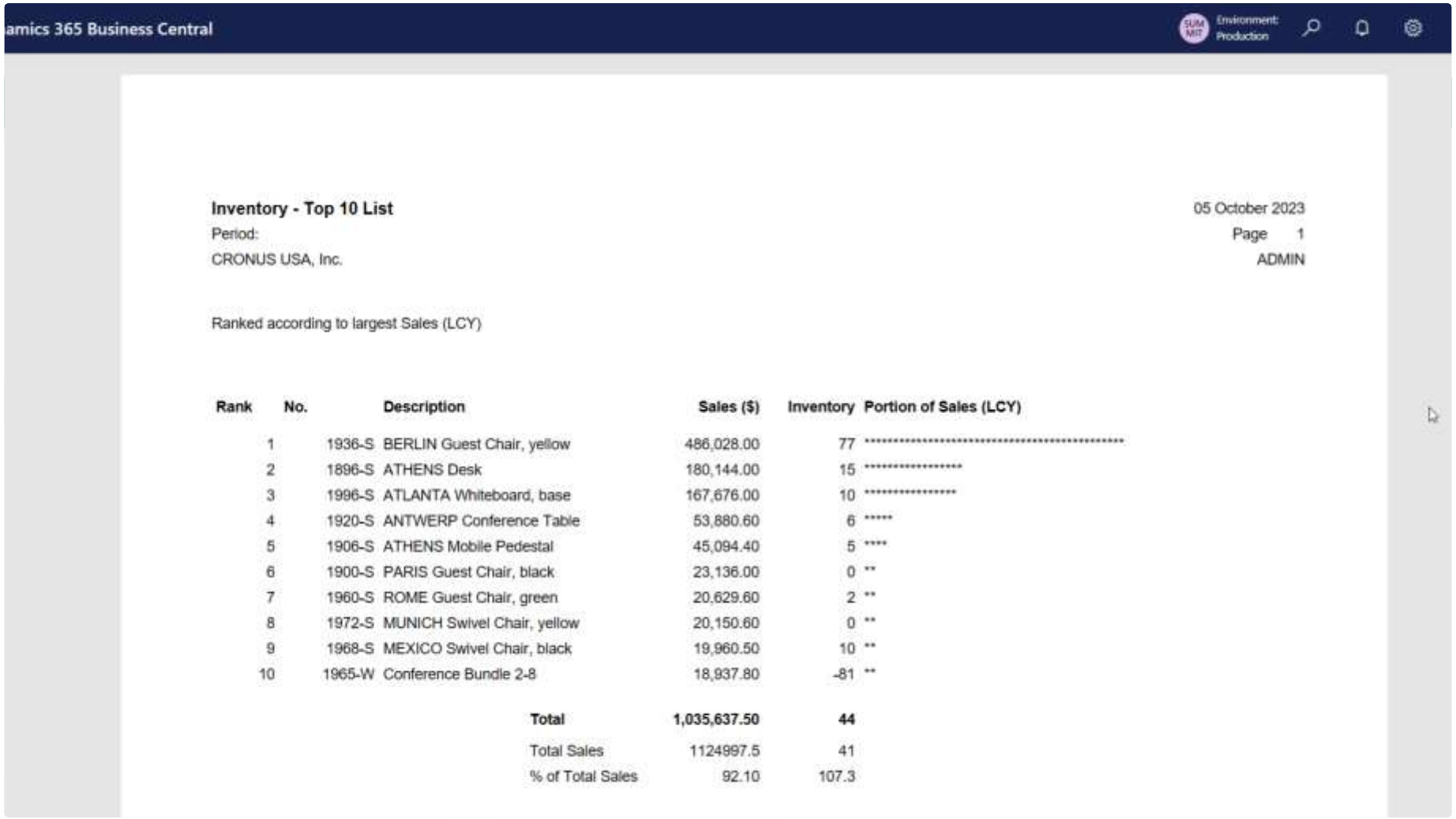
- In Business Central Admin Center Choose the Sandbox Environment you want elevated to production configuration.
- Choose Match production configuration
- Environment will automatically be reverted to sandbox configuration after 72 hours.
- Maximum 3 uses pr. tenant pr. Month.



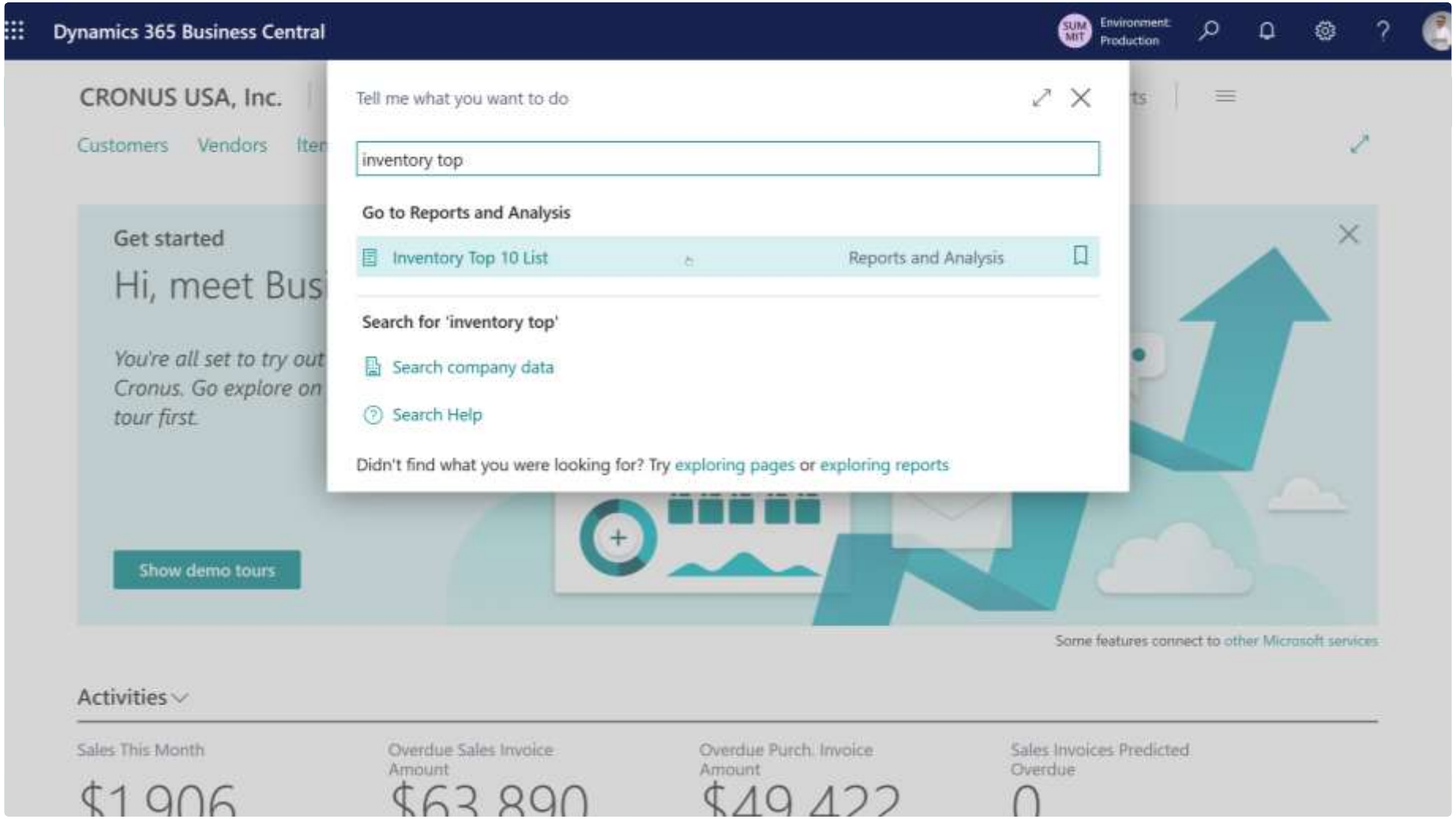


Tip # 38

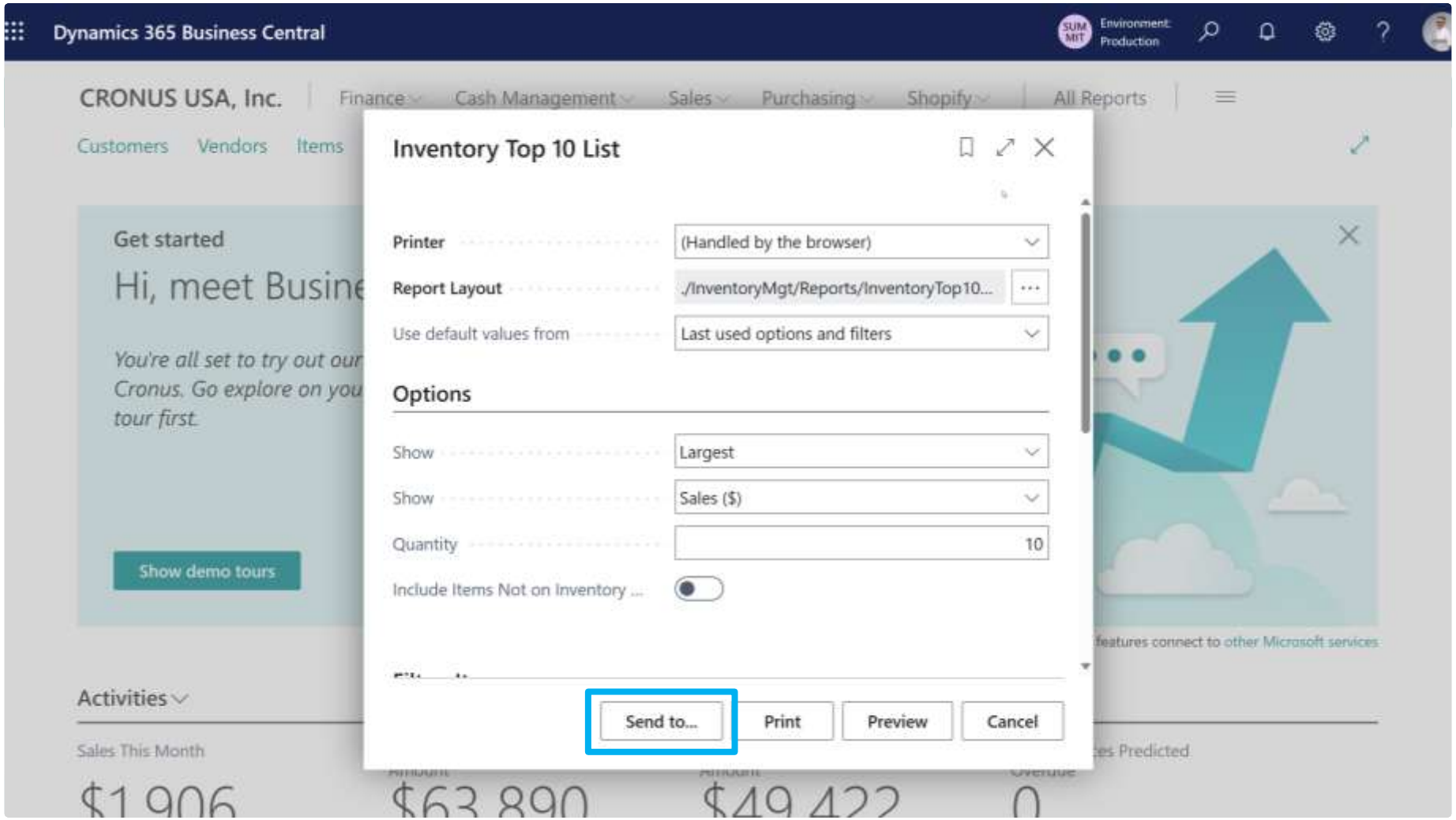
#38: Easily create an Excel layout for a report



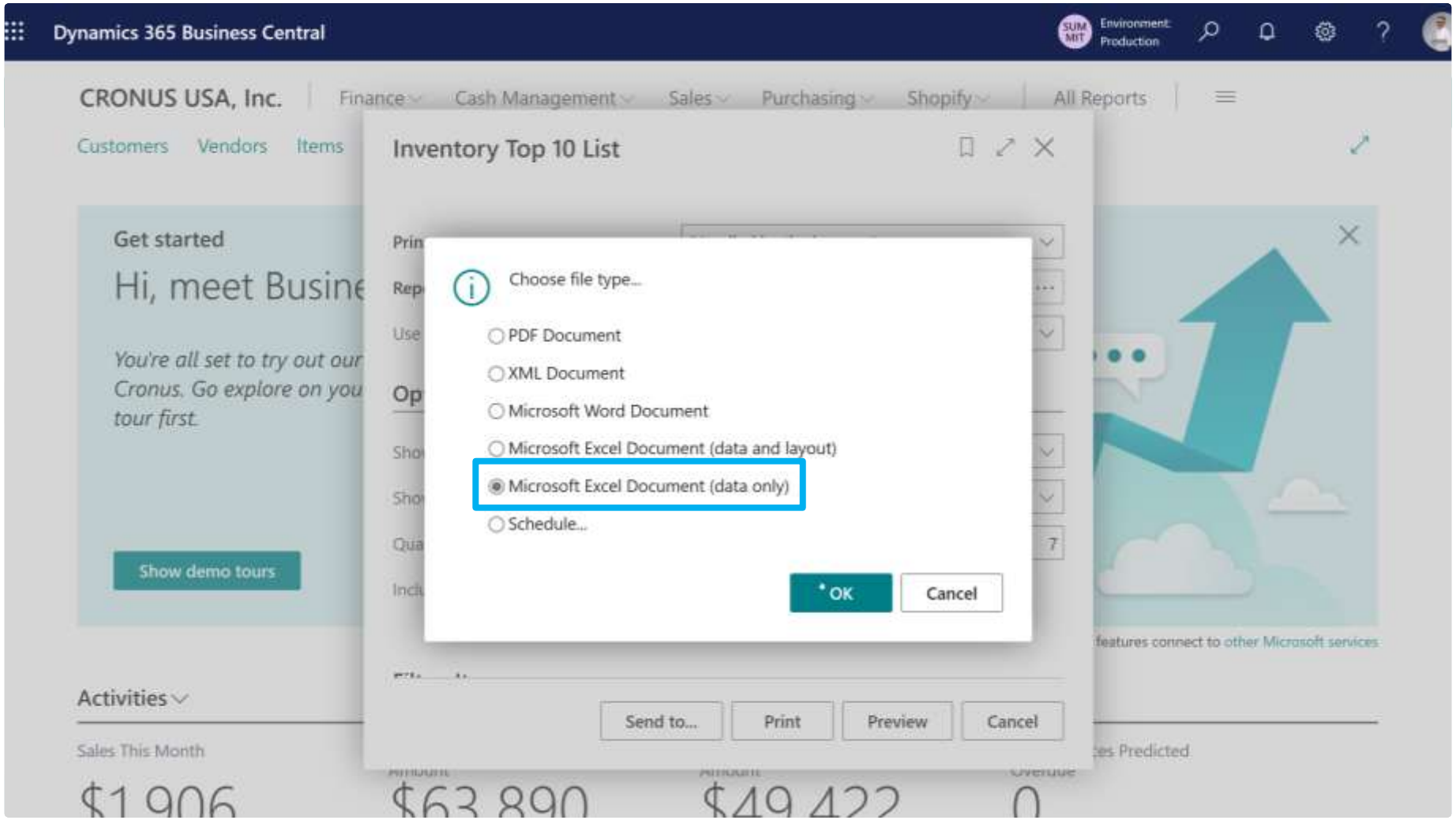
#38: Easily create an Excel layout for a report



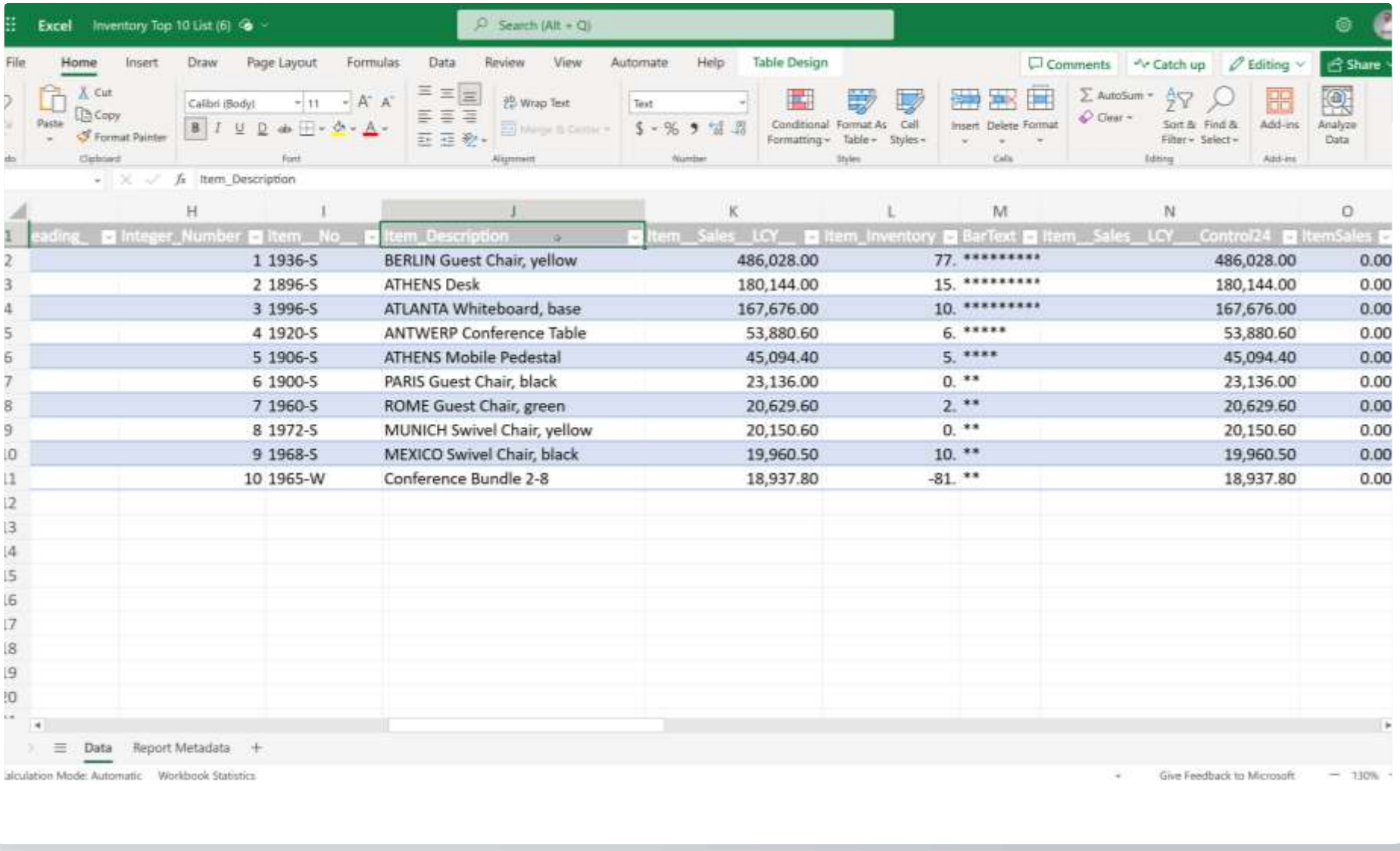
#38: Easily create an Excel layout for a report



#38: Easily create an Excel layout for a report

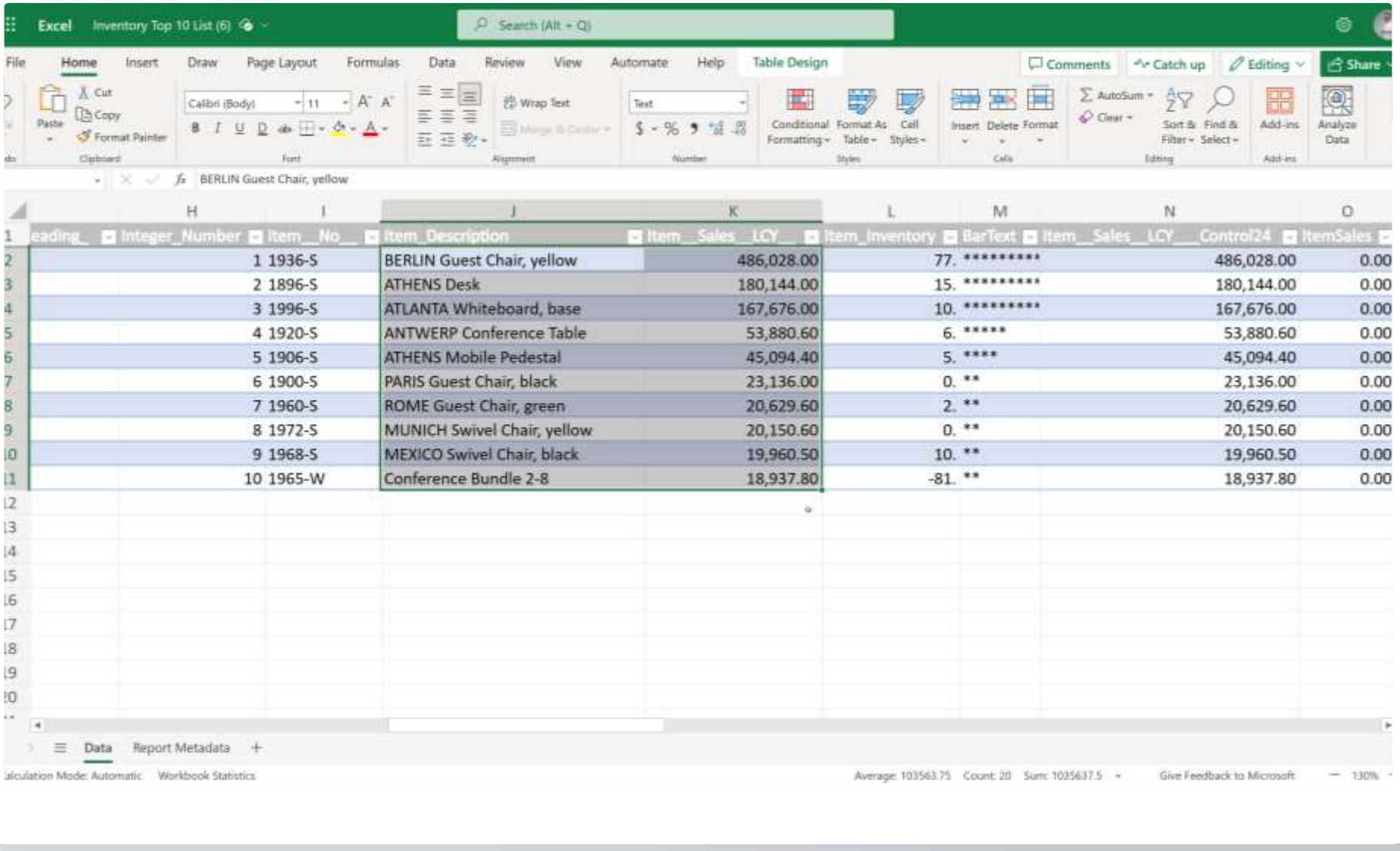


#38: Easily create an Excel layout for a report



	H	I	J	K	L	M	N	O
1	eading_	Integer_Number	Item__No_	Item_Description	Item__Sales__LCY__	Item_Inventory	BarText	Item__Sales__LCY__Control24	ItemSales
2		1	1936-S	BERLIN Guest Chair, yellow	486,028.00	77.	**********	486,028.00	0.00
3		2	1896-S	ATHENS Desk	180,144.00	15.	**********	180,144.00	0.00
4		3	1996-S	ATLANTA Whiteboard, base	167,676.00	10.	**********	167,676.00	0.00
5		4	1920-S	ANTWERP Conference Table	53,880.60	6.	*****	53,880.60	0.00
6		5	1906-S	ATHENS Mobile Pedestal	45,094.40	5.	****	45,094.40	0.00
7		6	1900-S	PARIS Guest Chair, black	23,136.00	0.	**	23,136.00	0.00
8		7	1960-S	ROME Guest Chair, green	20,629.60	2.	**	20,629.60	0.00
9		8	1972-S	MUNICH Swivel Chair, yellow	20,150.60	0.	**	20,150.60	0.00
10		9	1968-S	MEXICO Swivel Chair, black	19,960.50	10.	**	19,960.50	0.00
11		10	1965-W	Conference Bundle 2-8	18,937.80	-81.	**	18,937.80	0.00
12								
13								
14								
15								
16								
17								
18								
19								
20								

#38: Easily create an Excel layout for a report



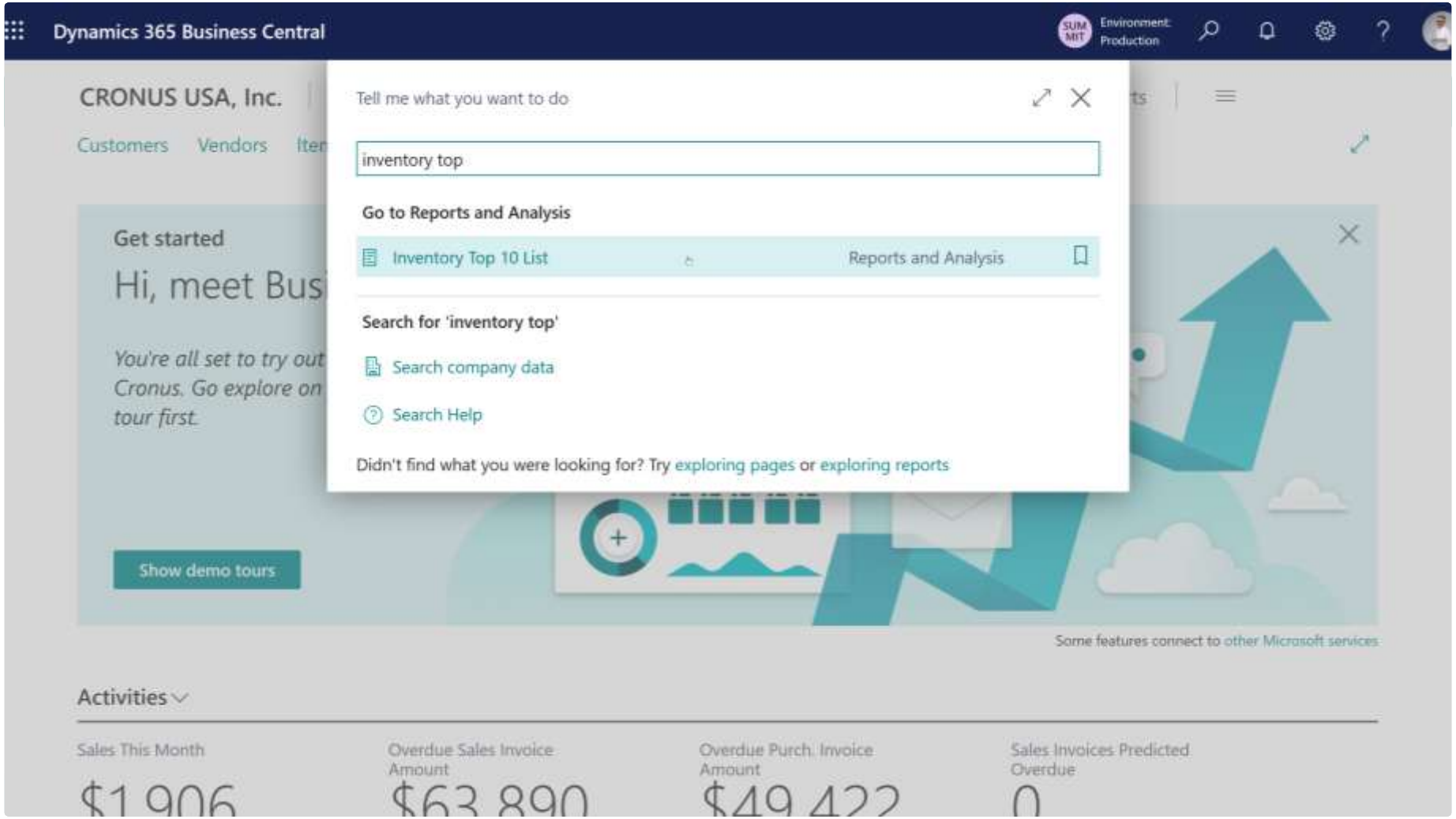
	H	I	J	K	L	M	N	O
1	eading_	Integer_Number	Item__No_	Item_Description	Item__Sales__LCY	Item_Inventory	BarText	Item__Sales__LCY__Control24	ItemSales
2		1	1936-S	BERLIN Guest Chair, yellow	486,028.00	77.	**********	486,028.00	0.00
3		2	1896-S	ATHENS Desk	180,144.00	15.	**********	180,144.00	0.00
4		3	1996-S	ATLANTA Whiteboard, base	167,676.00	10.	**********	167,676.00	0.00
5		4	1920-S	ANTWERP Conference Table	53,880.60	6.	*****	53,880.60	0.00
6		5	1906-S	ATHENS Mobile Pedestal	45,094.40	5.	****	45,094.40	0.00
7		6	1900-S	PARIS Guest Chair, black	23,136.00	0.	**	23,136.00	0.00
8		7	1960-S	ROME Guest Chair, green	20,629.60	2.	**	20,629.60	0.00
9		8	1972-S	MUNICH Swivel Chair, yellow	20,150.60	0.	**	20,150.60	0.00
10		9	1968-S	MEXICO Swivel Chair, black	19,960.50	10.	**	19,960.50	0.00
11		10	1965-W	Conference Bundle 2-8	18,937.80	-81.	**	18,937.80	0.00

#38: Easily create an Excel layout for a report

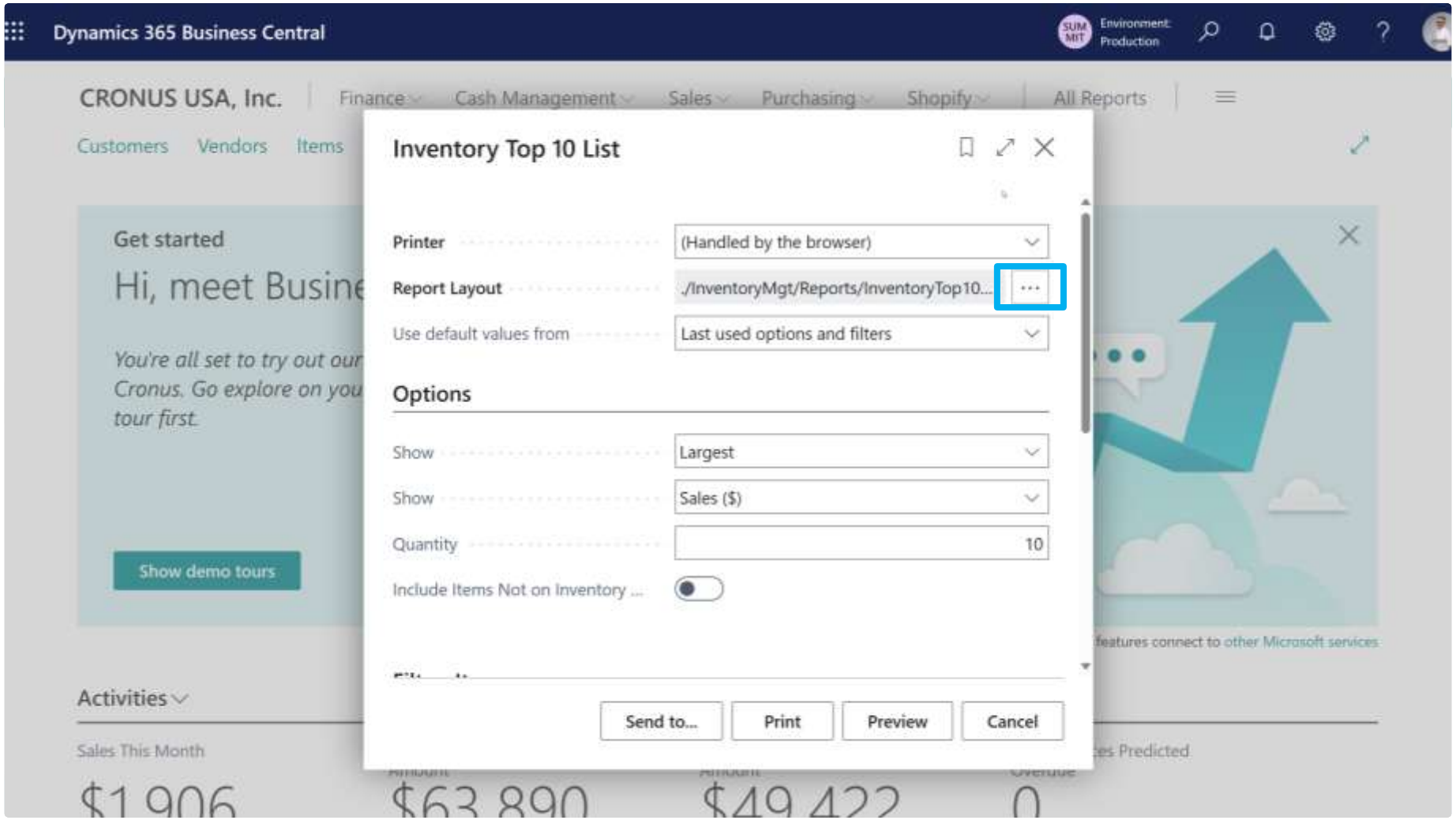


Add as much Excel magic and sheets as you like. The Data sheet updates when printing

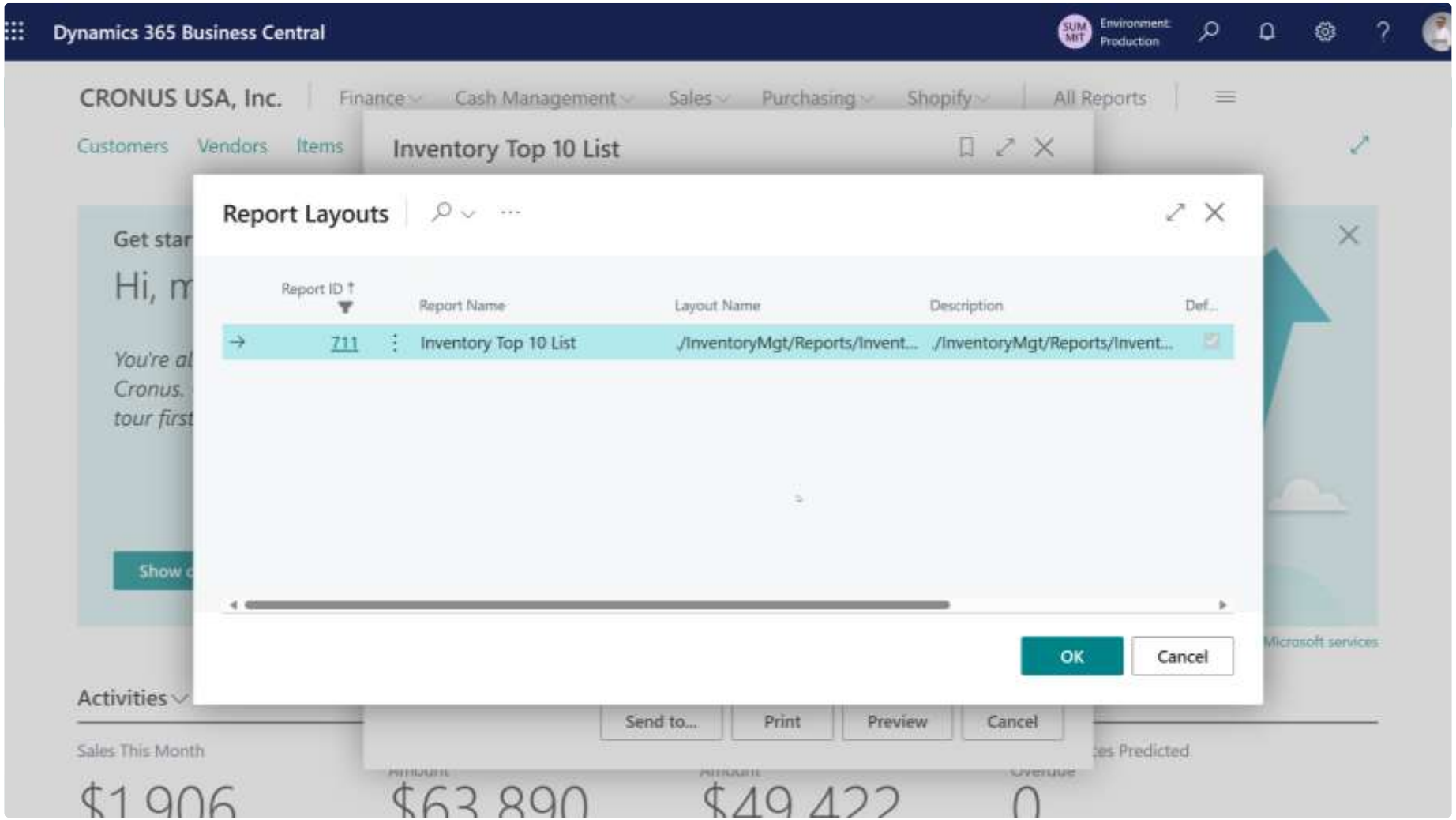
#38: Easily create an Excel layout for a report



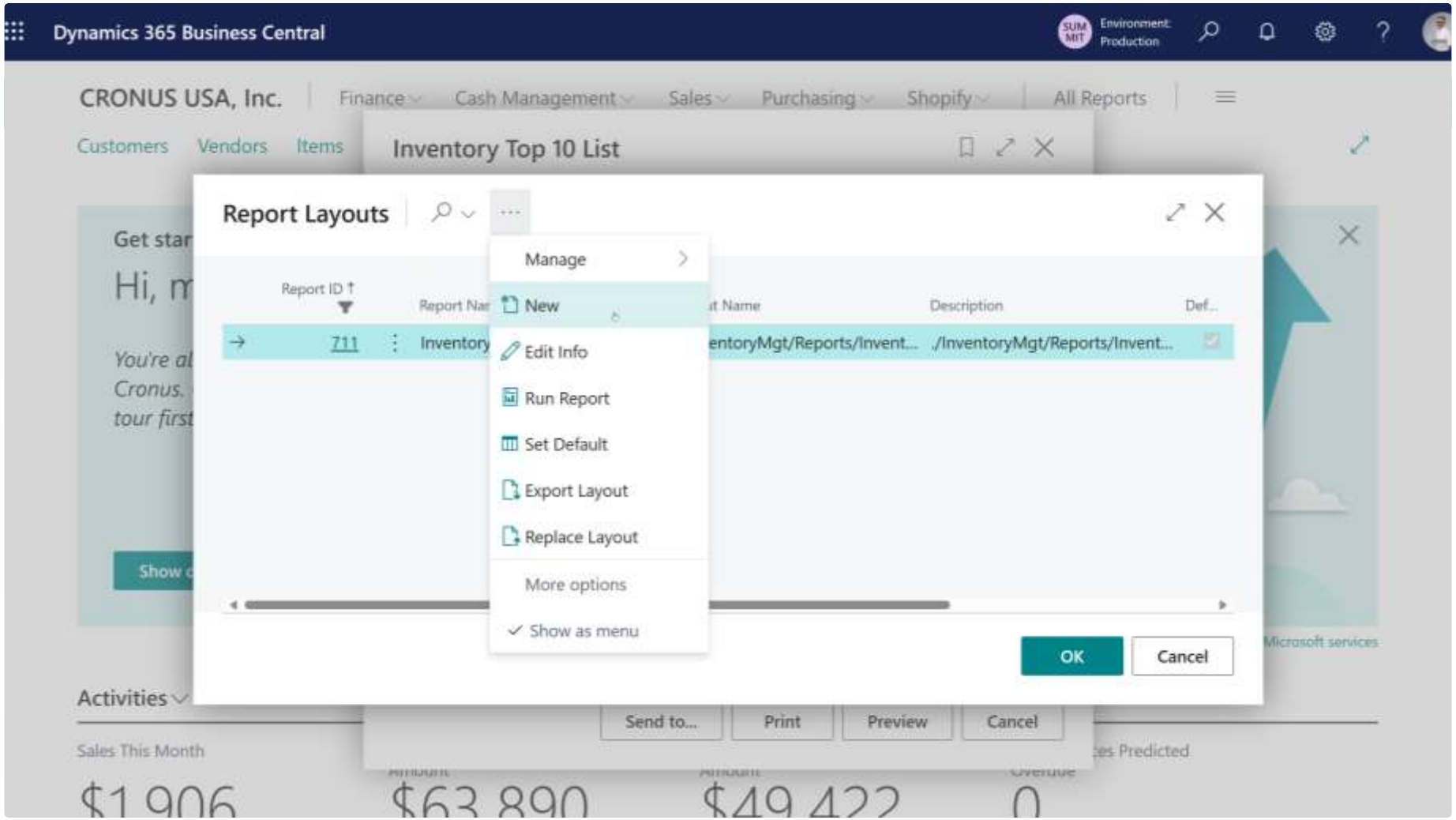
#38: Easily create an Excel layout for a report



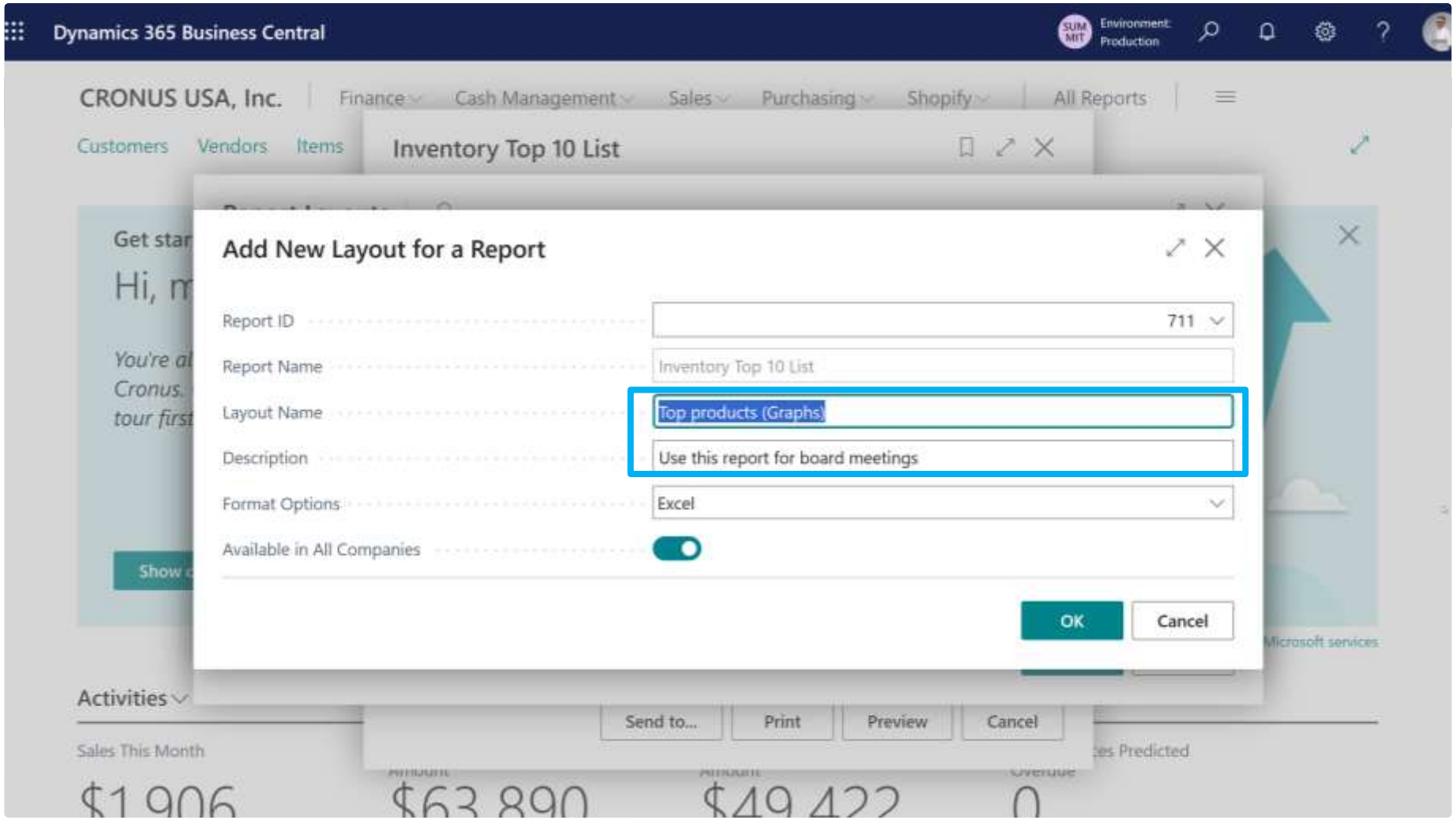
#38: Easily create an Excel layout for a report



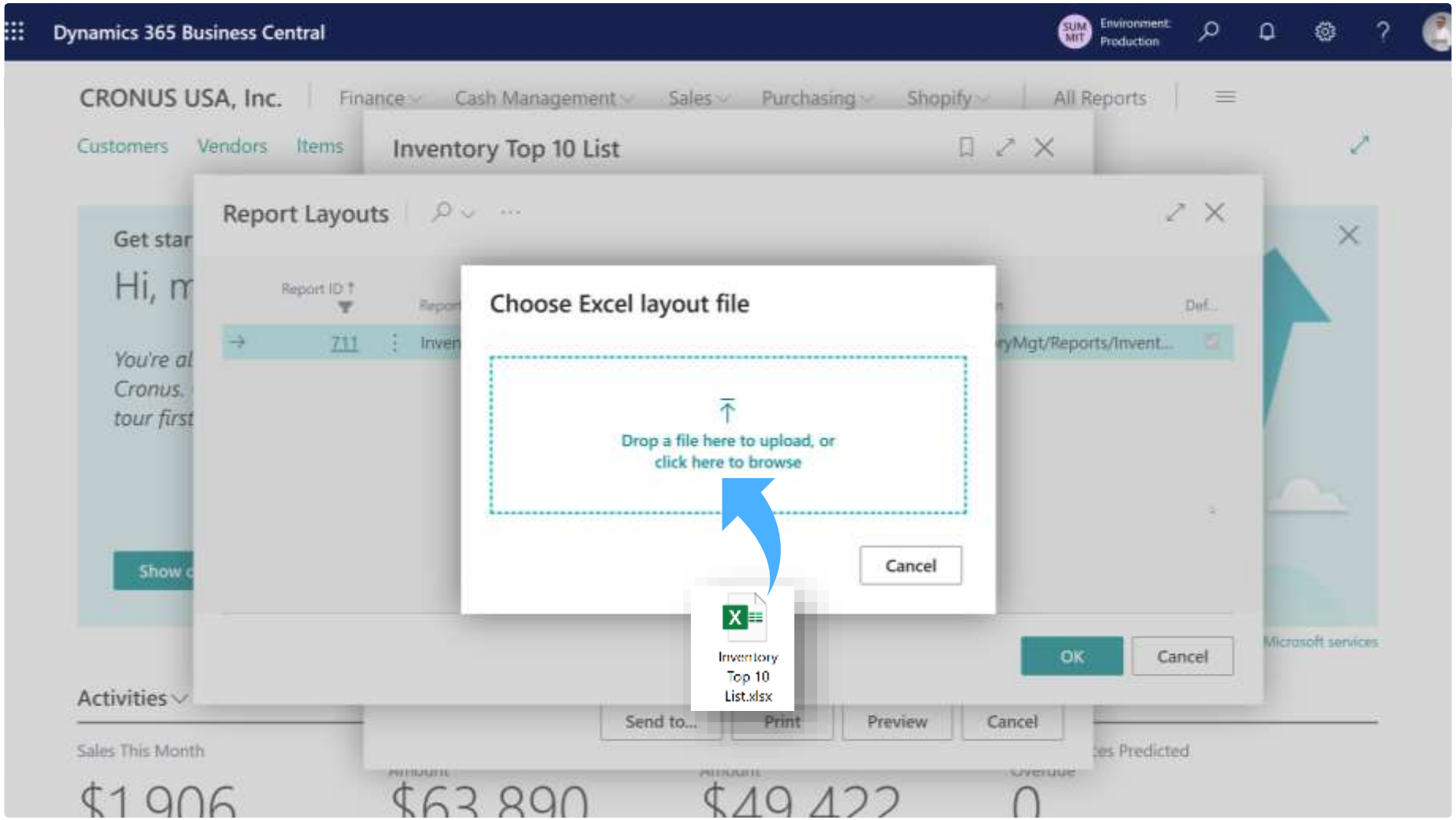
#38: Easily create an Excel layout for a report



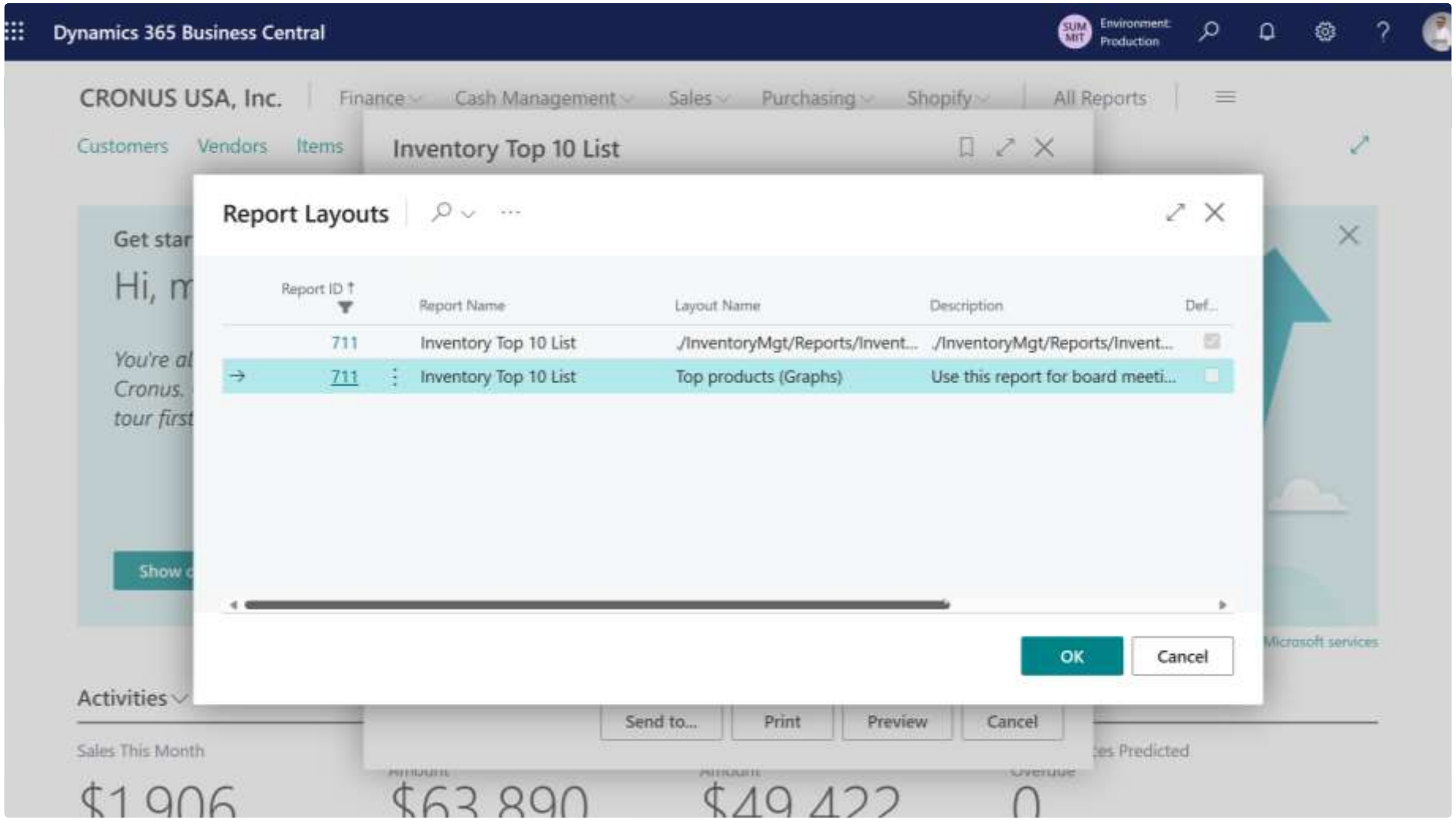
#38: Easily create an Excel layout for a report



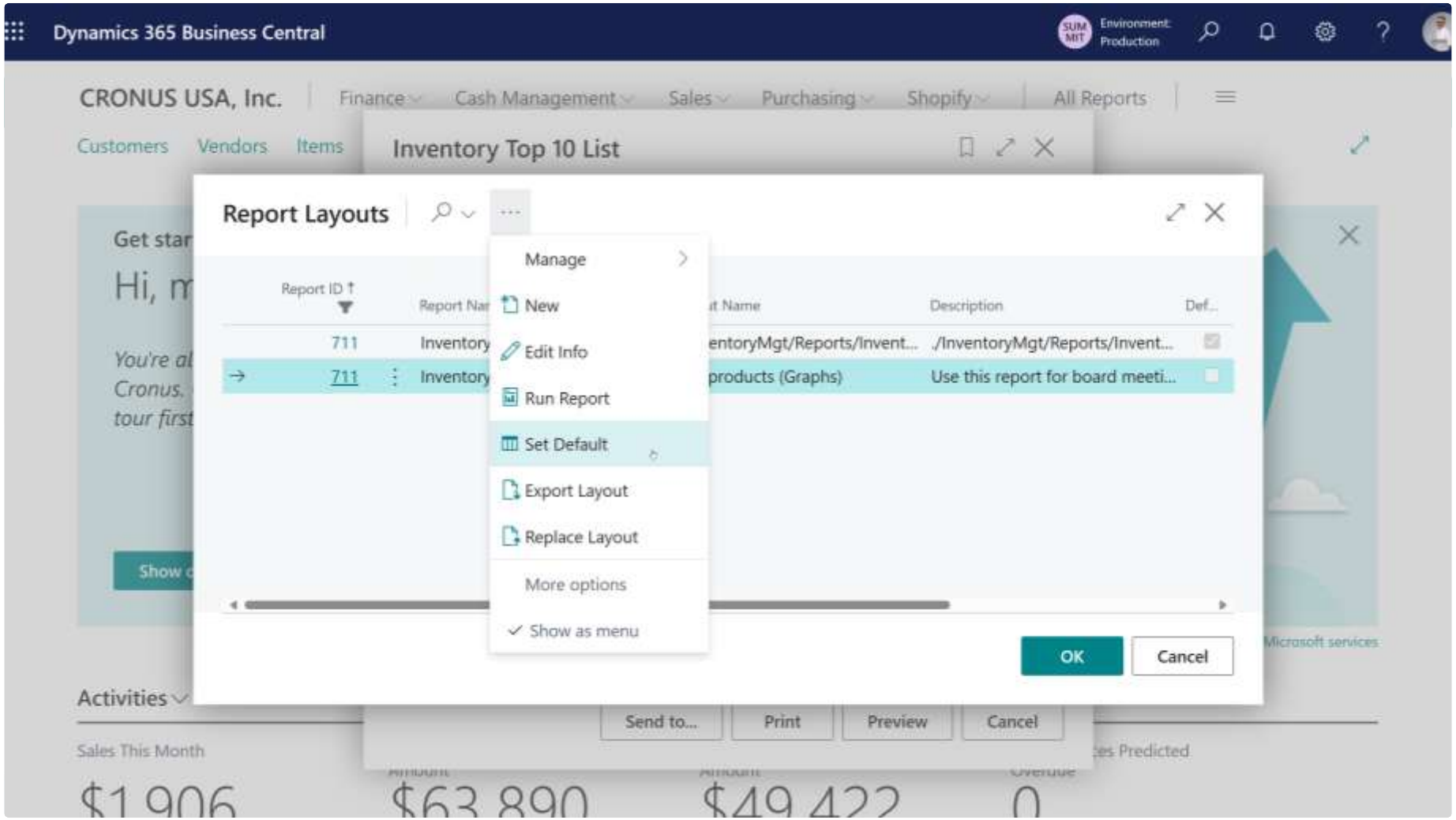
#38: Easily create an Excel layout for a report



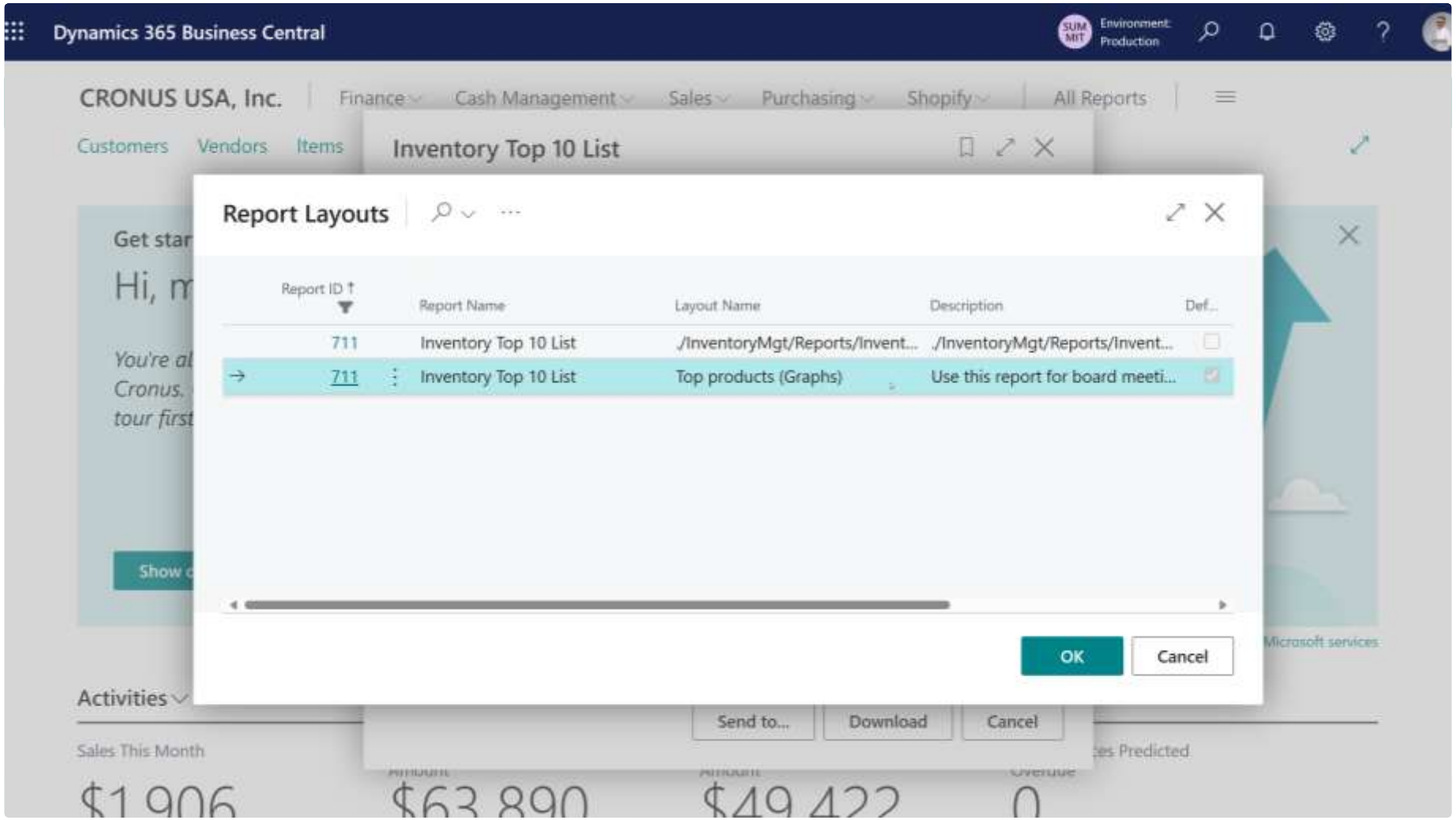
#38: Easily create an Excel layout for a report



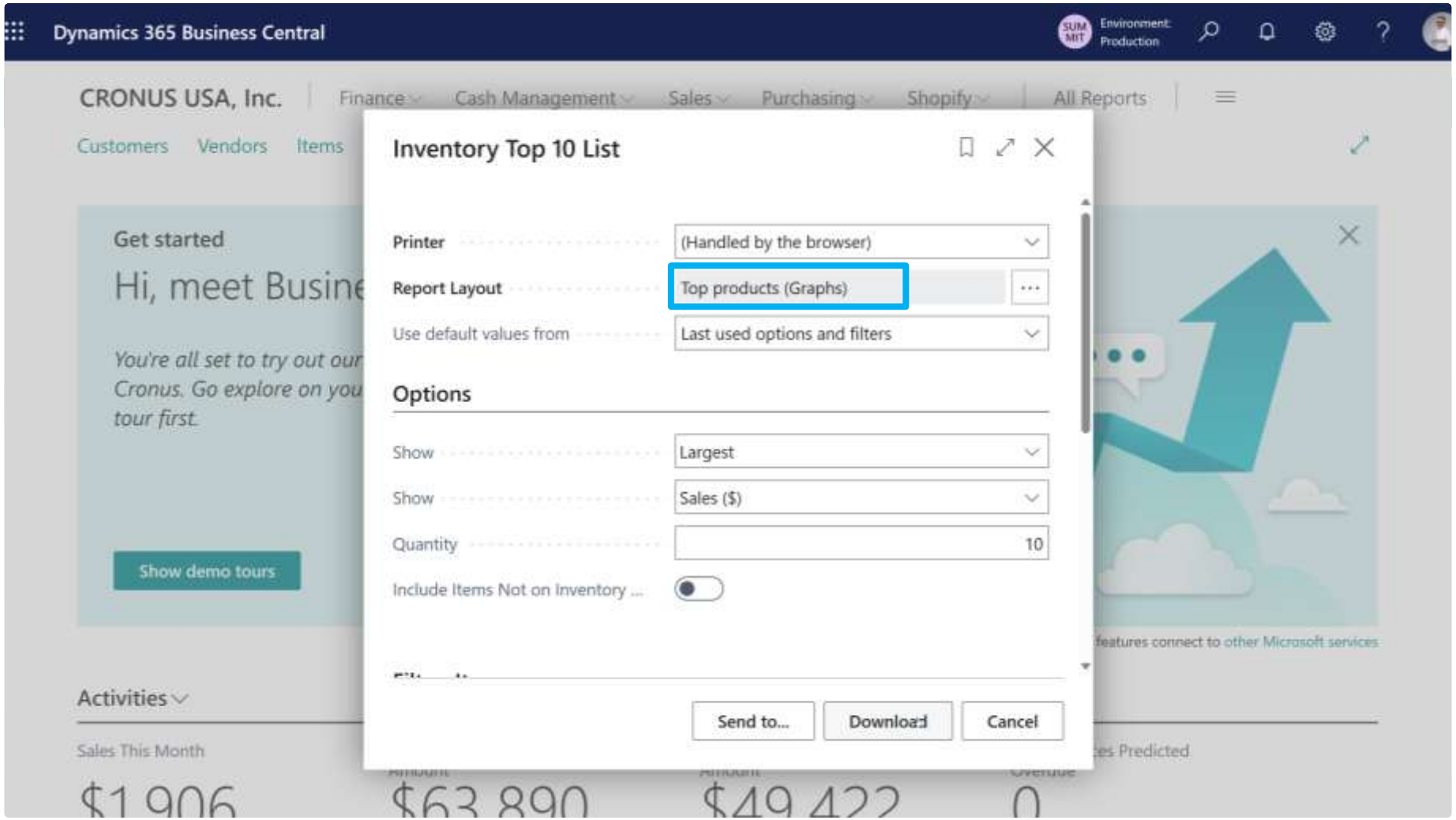
#38: Easily create an Excel layout for a report



#38: Easily create an Excel layout for a report



#38: Easily create an Excel layout for a report



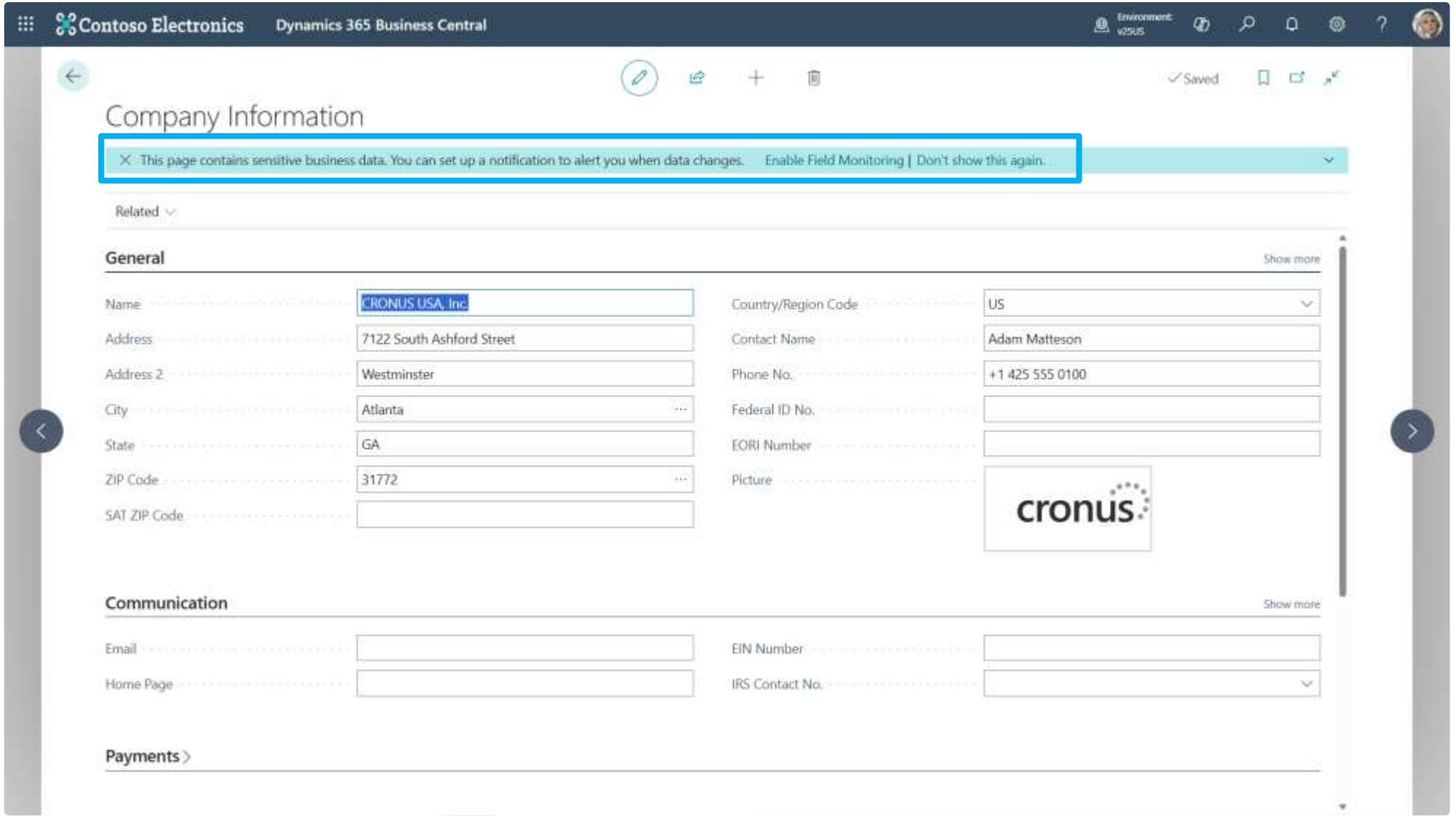
#38: Easily create an Excel layout for a report



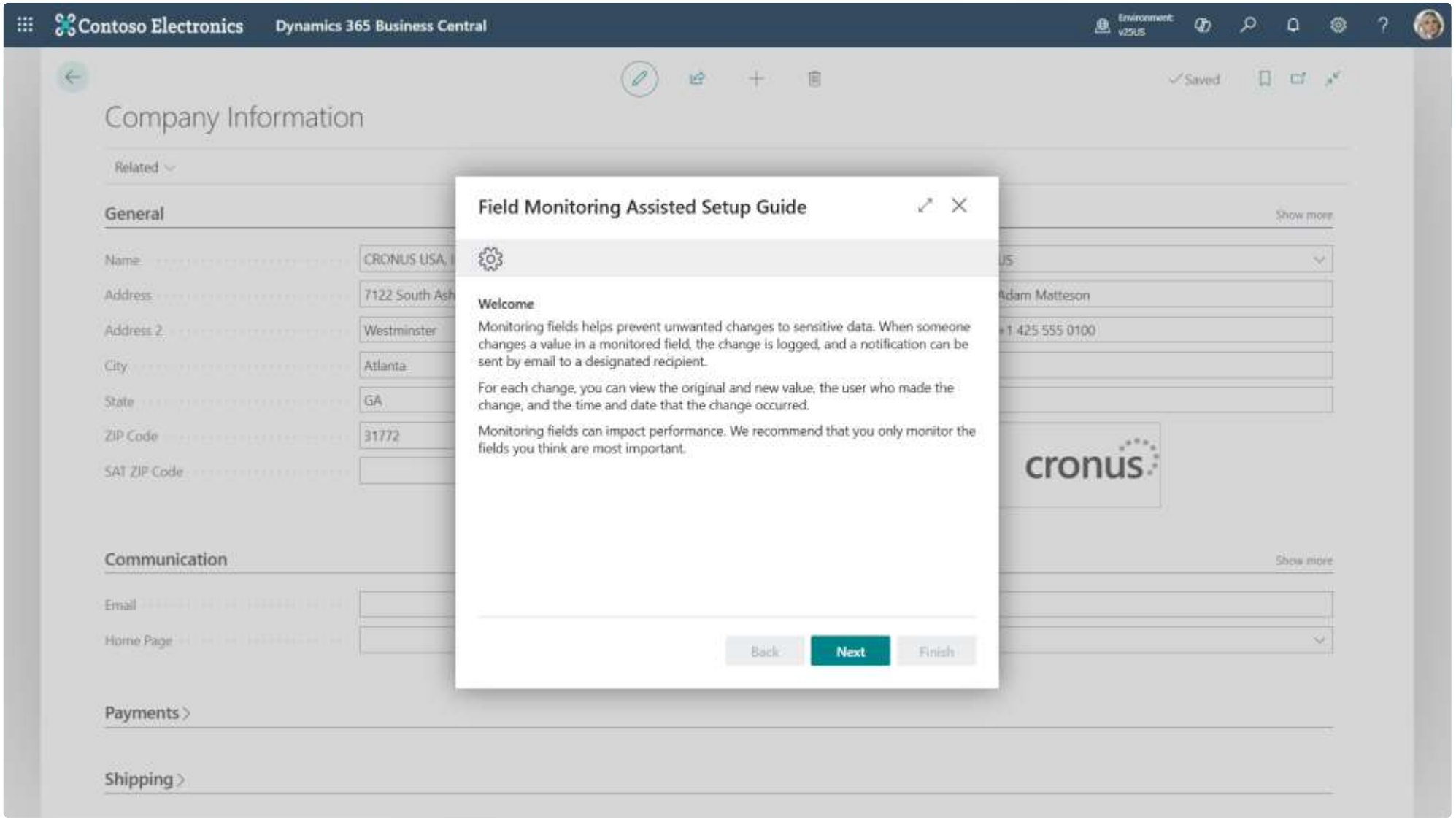


Tip # 39

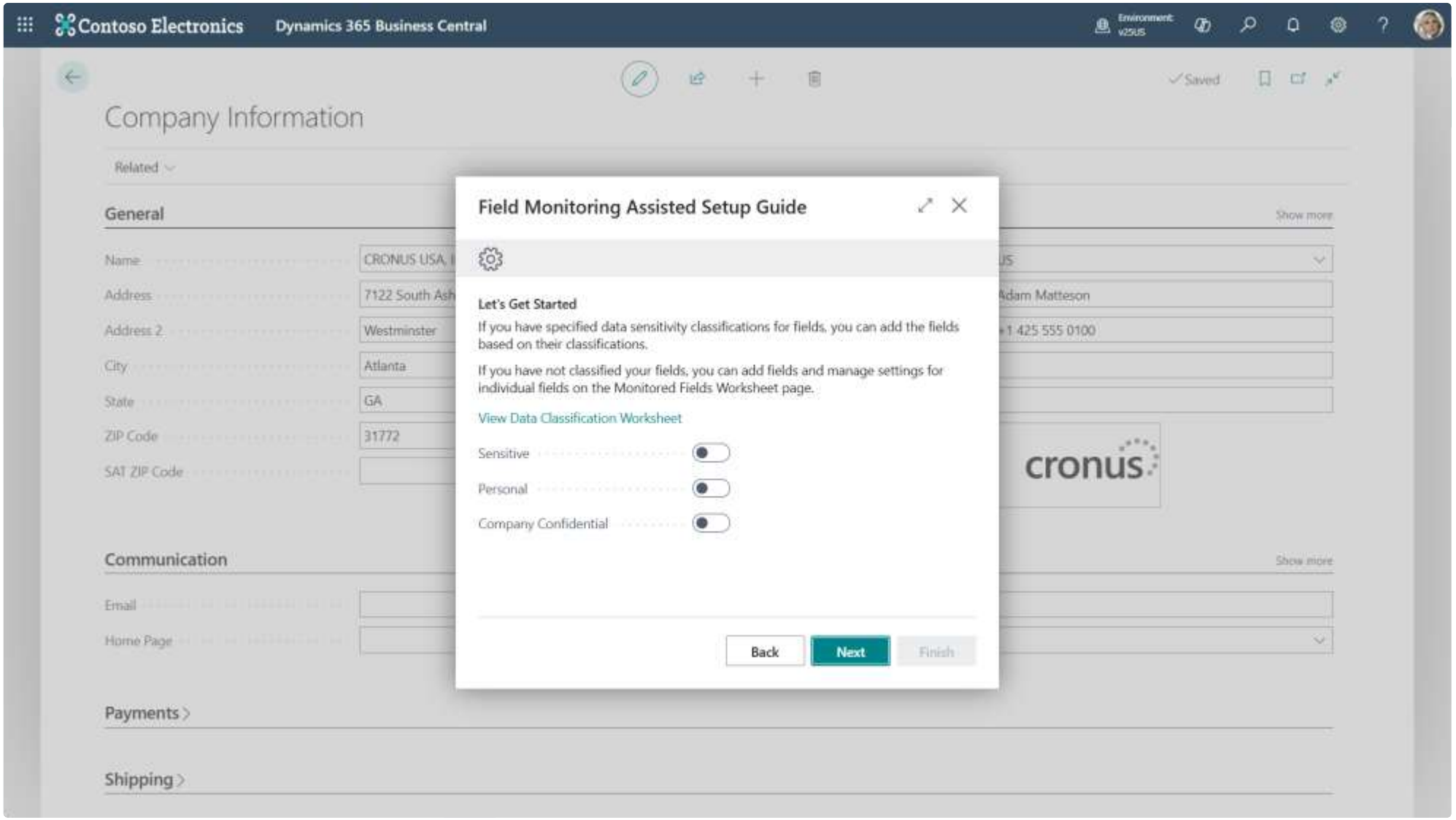
#39: Monitor sensitive fields



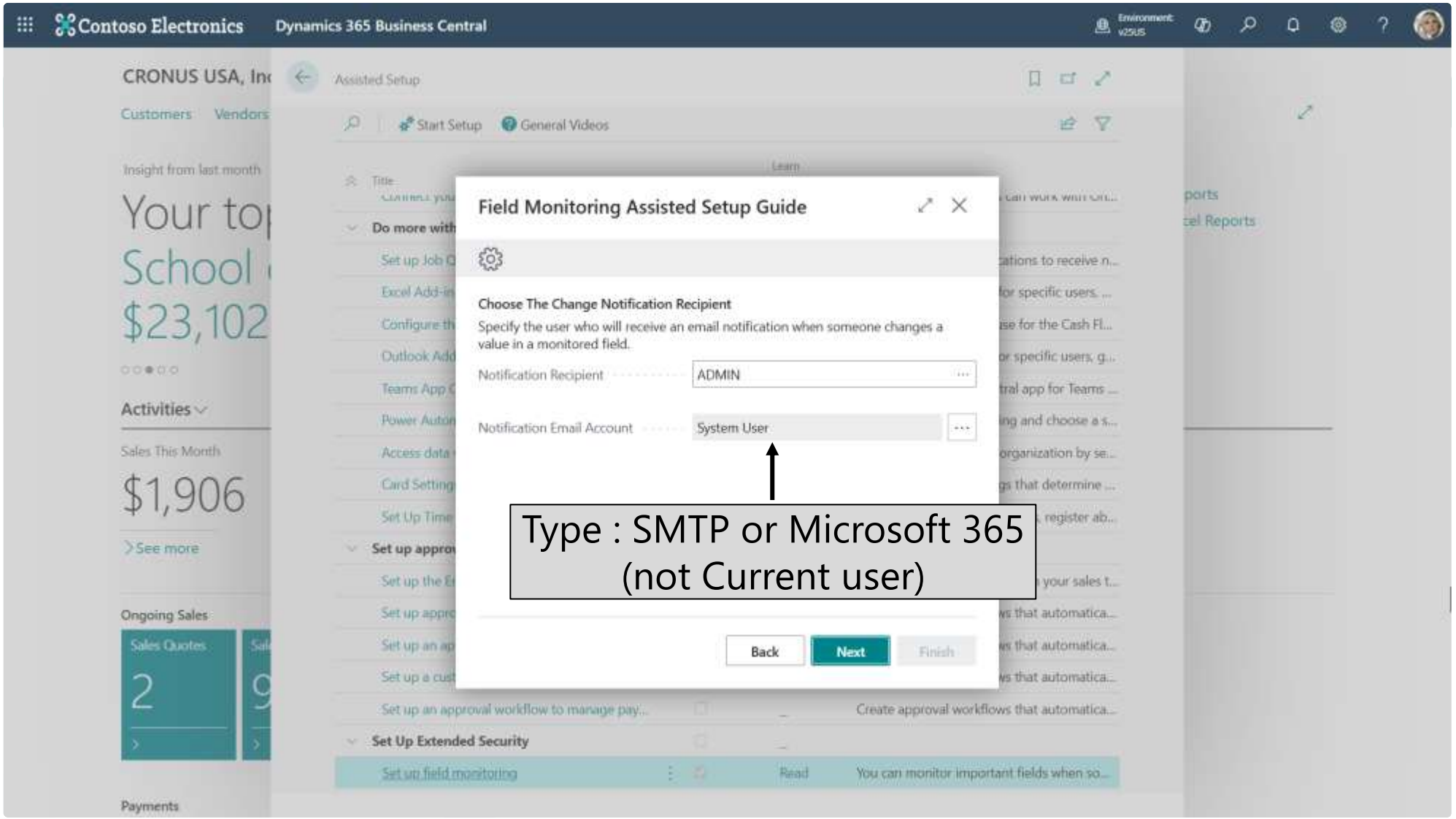
#39: Monitor sensitive fields



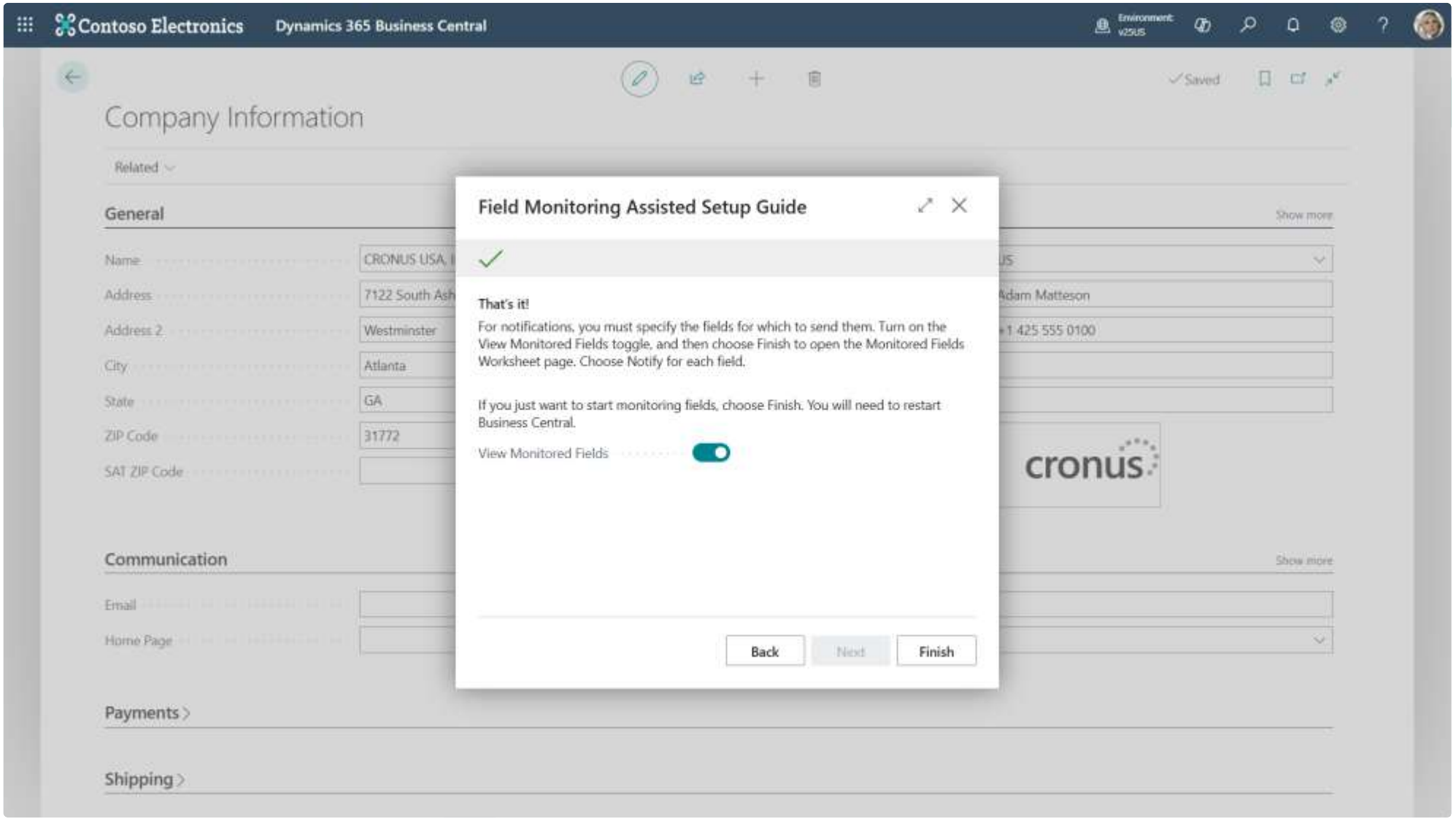
#39: Monitor sensitive fields



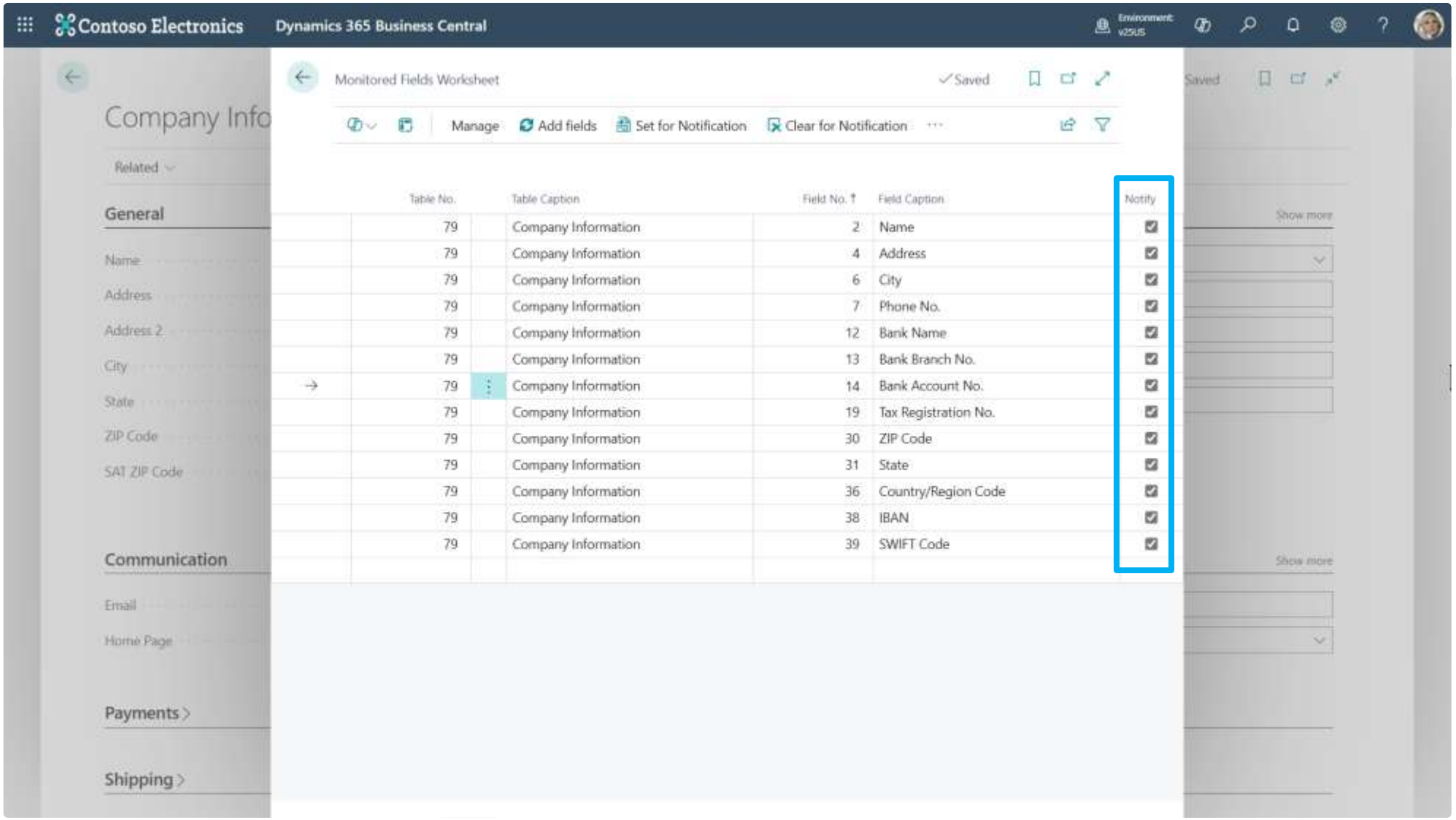
#39: Monitor sensitive fields



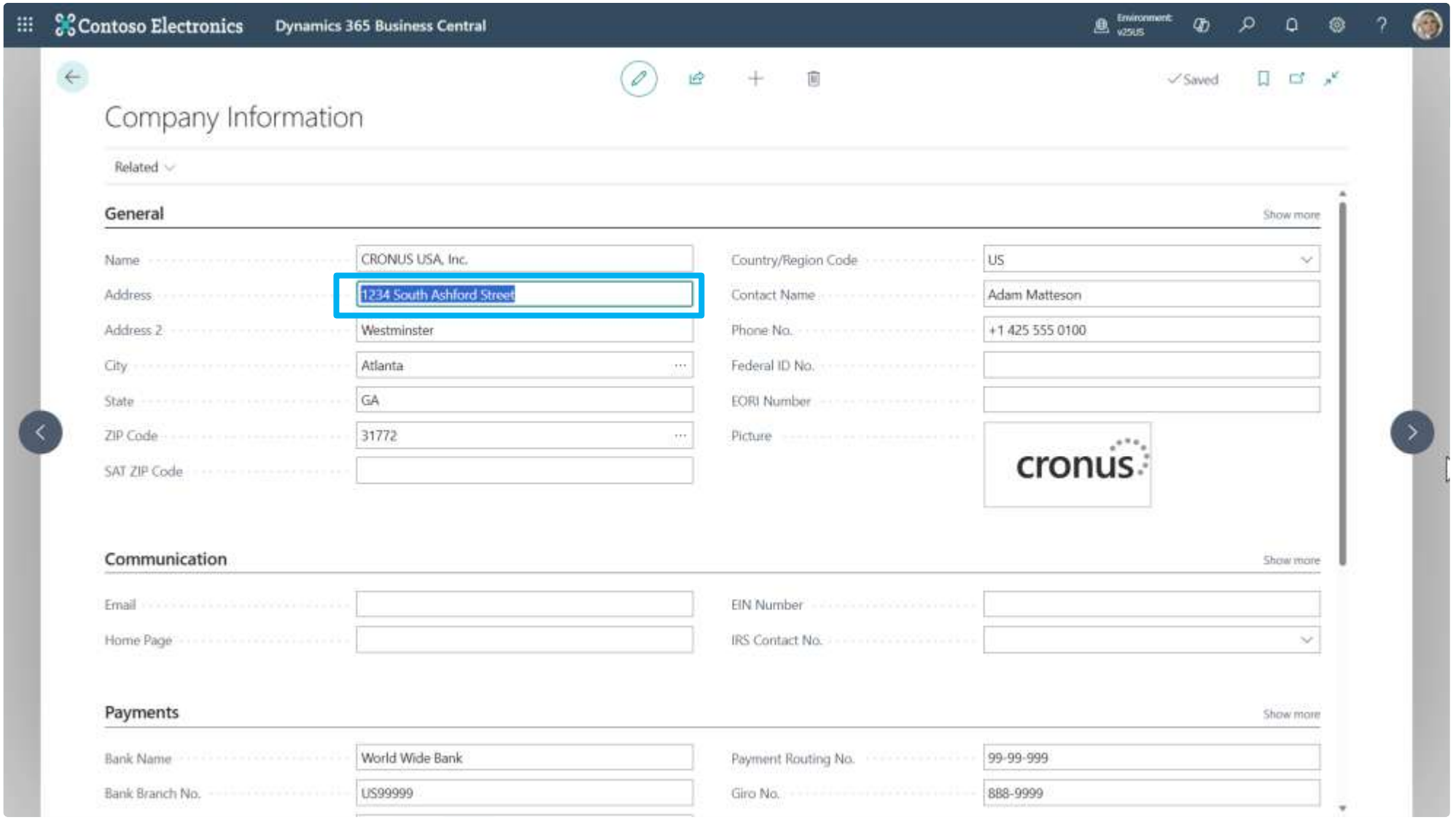
#39: Monitor sensitive fields



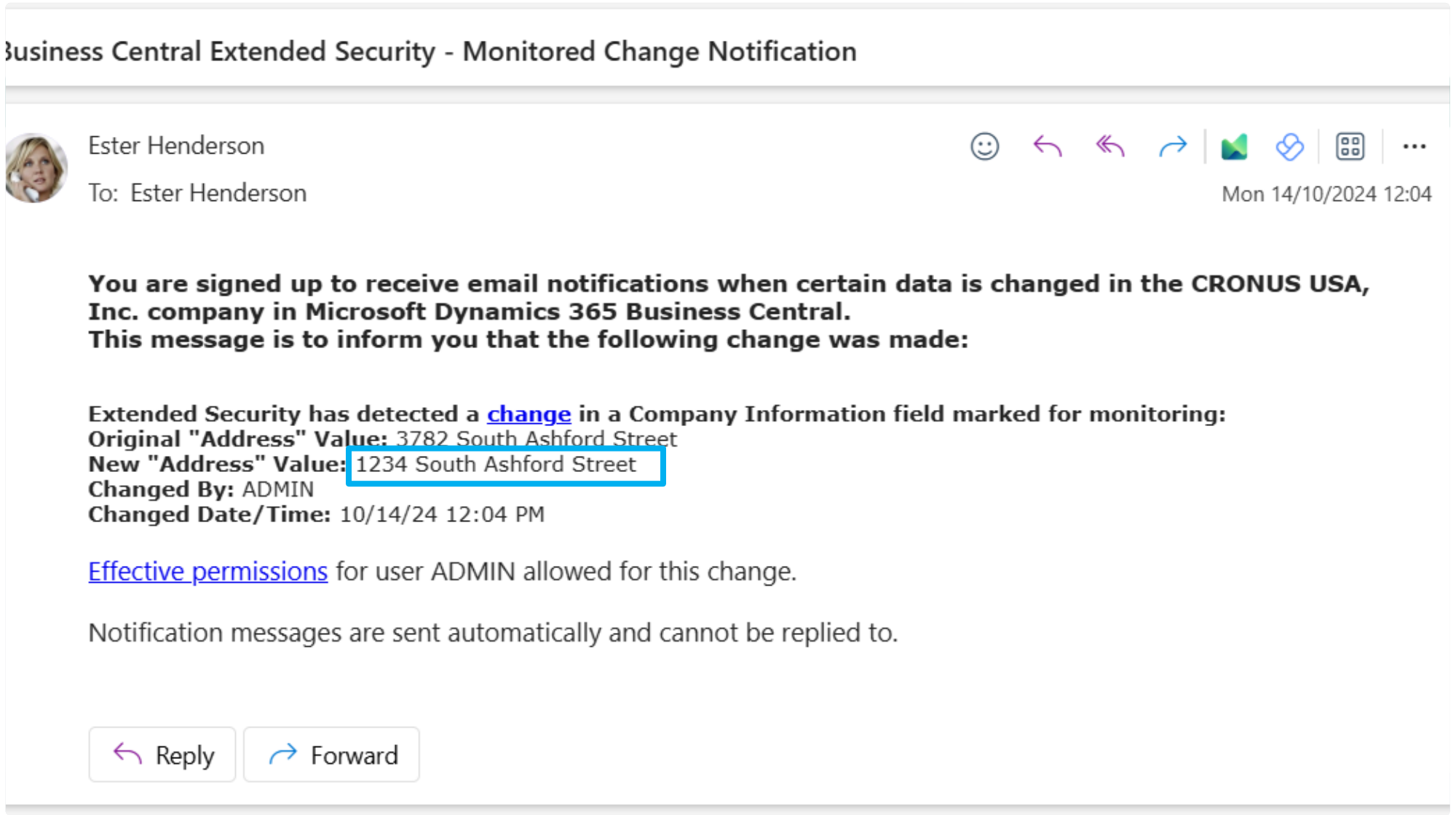
#39: Monitor sensitive fields



#39: Monitor sensitive fields



#39: Monitor sensitive fields



NEW



Tip # 40

#40: Copilot – Compare data from sources

Try something like:

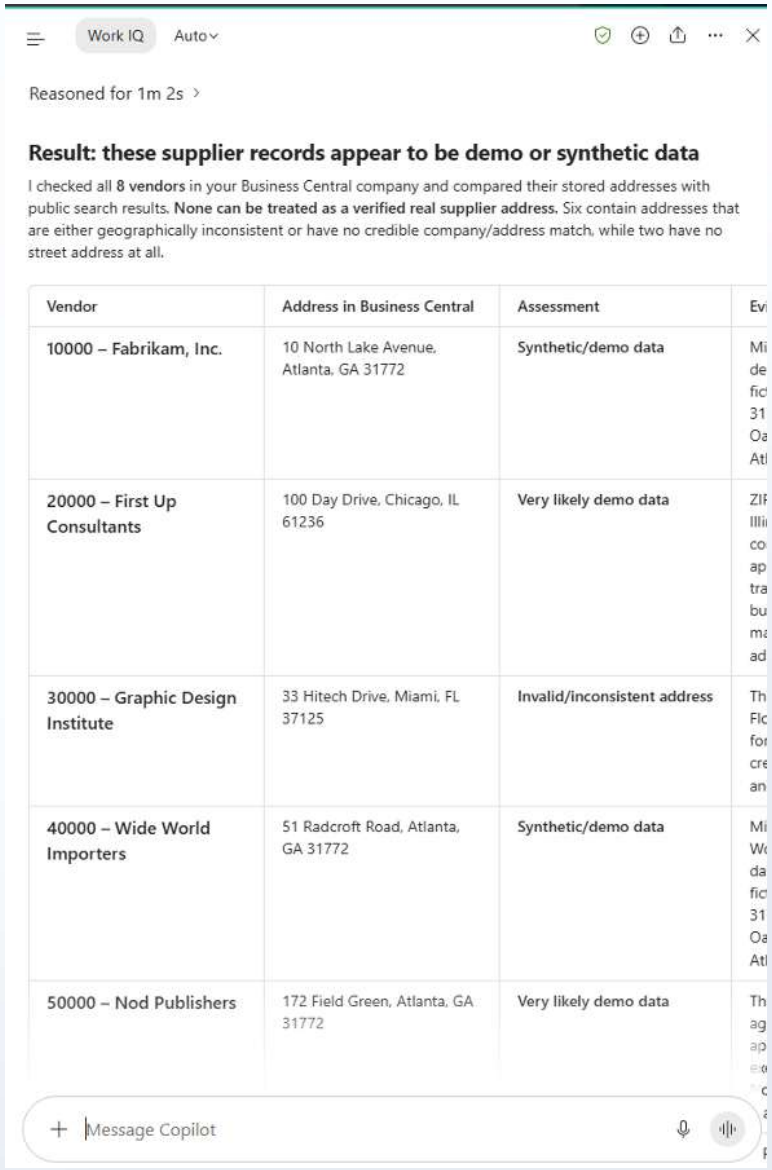
“Potential customer is asking if we'd have large quantity of furniture. Are we able to fulfill such a potential order? See attached file.”



“I have a list of customers from my subsidiary, can you run a comparison with my list and present differences in a simple, visual way”



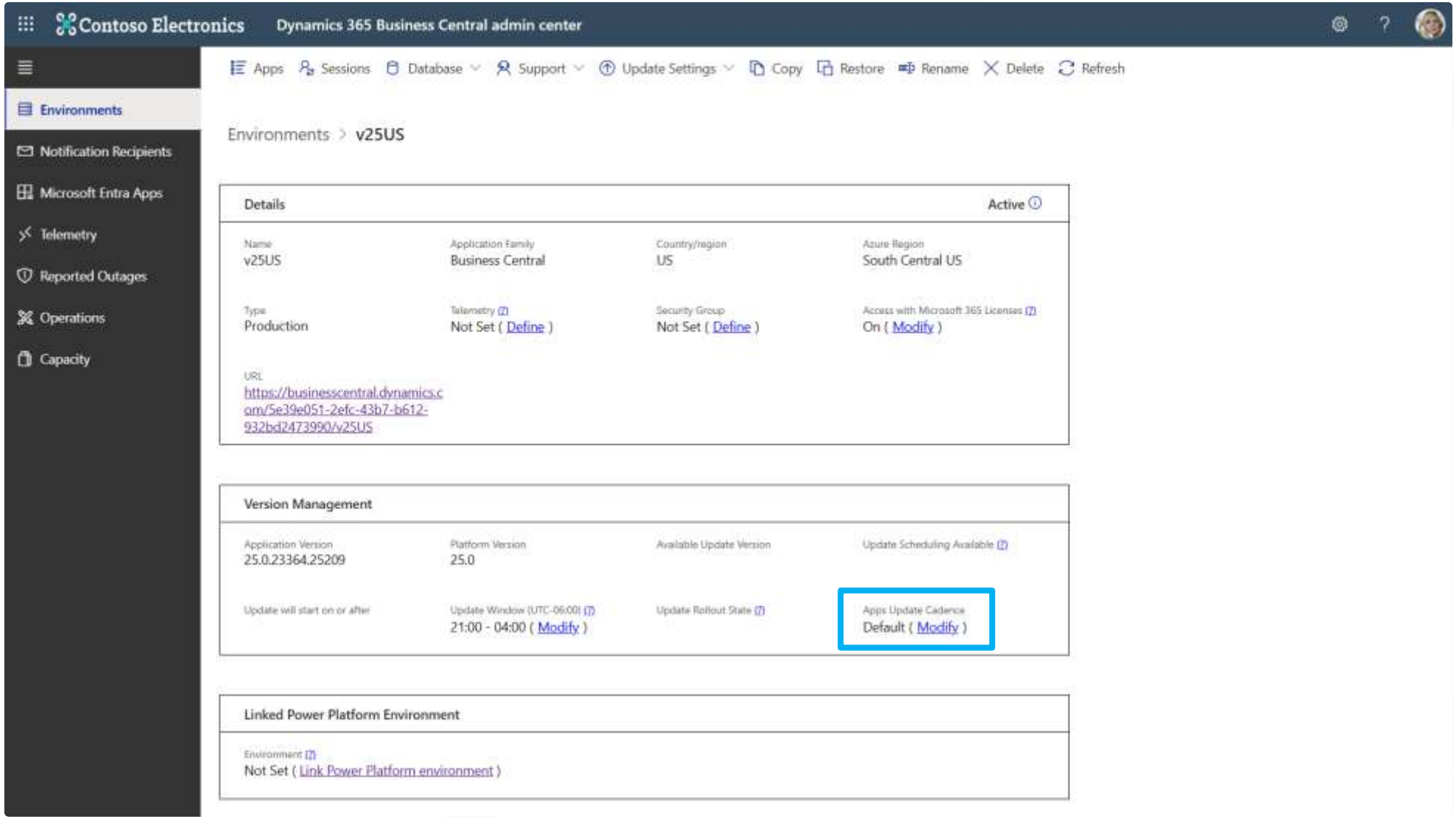
“Can you check if addresses of each of my suppliers are real addresses?”



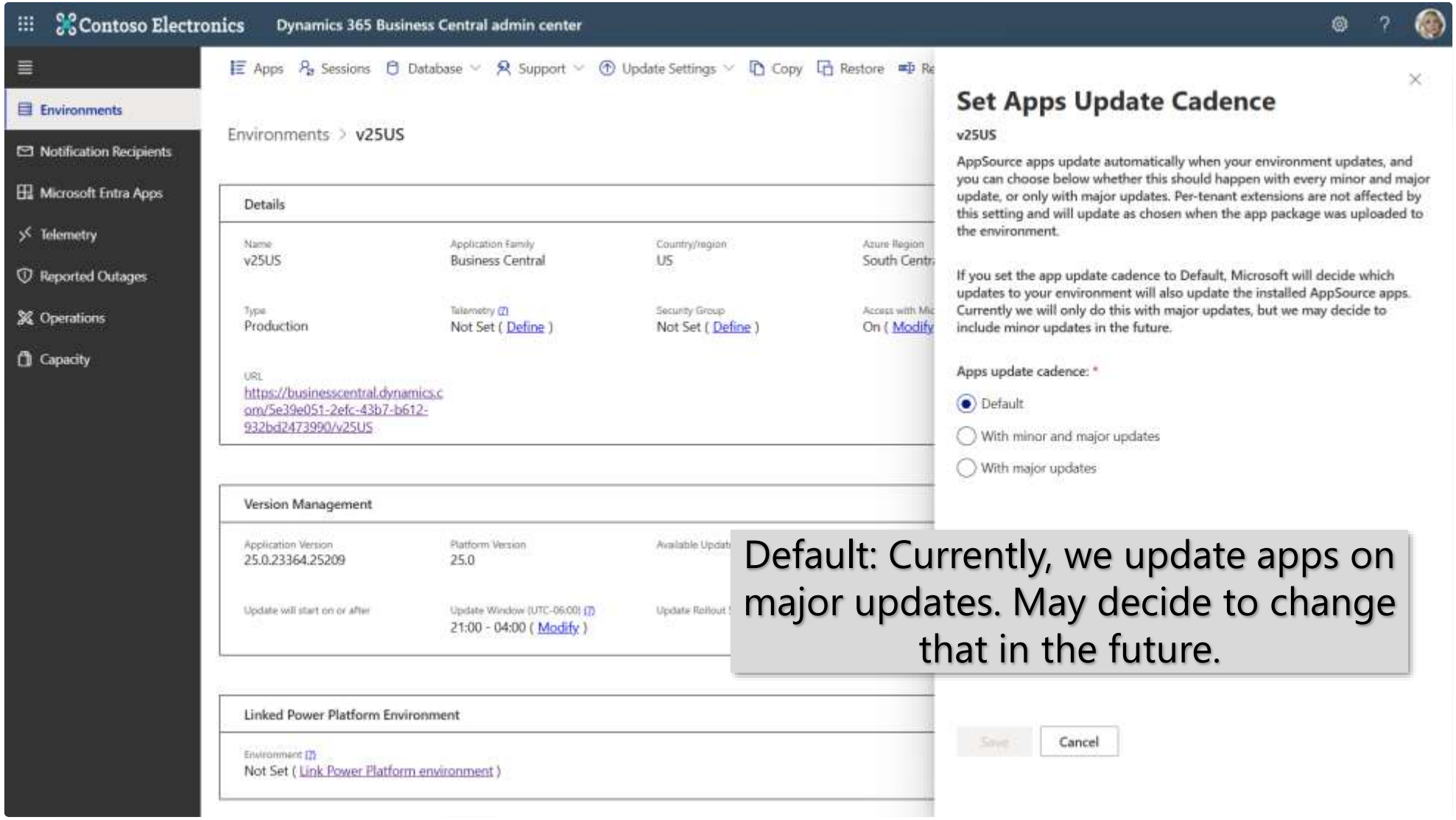


Tip # 41

#41: When to update apps after a Business Central update



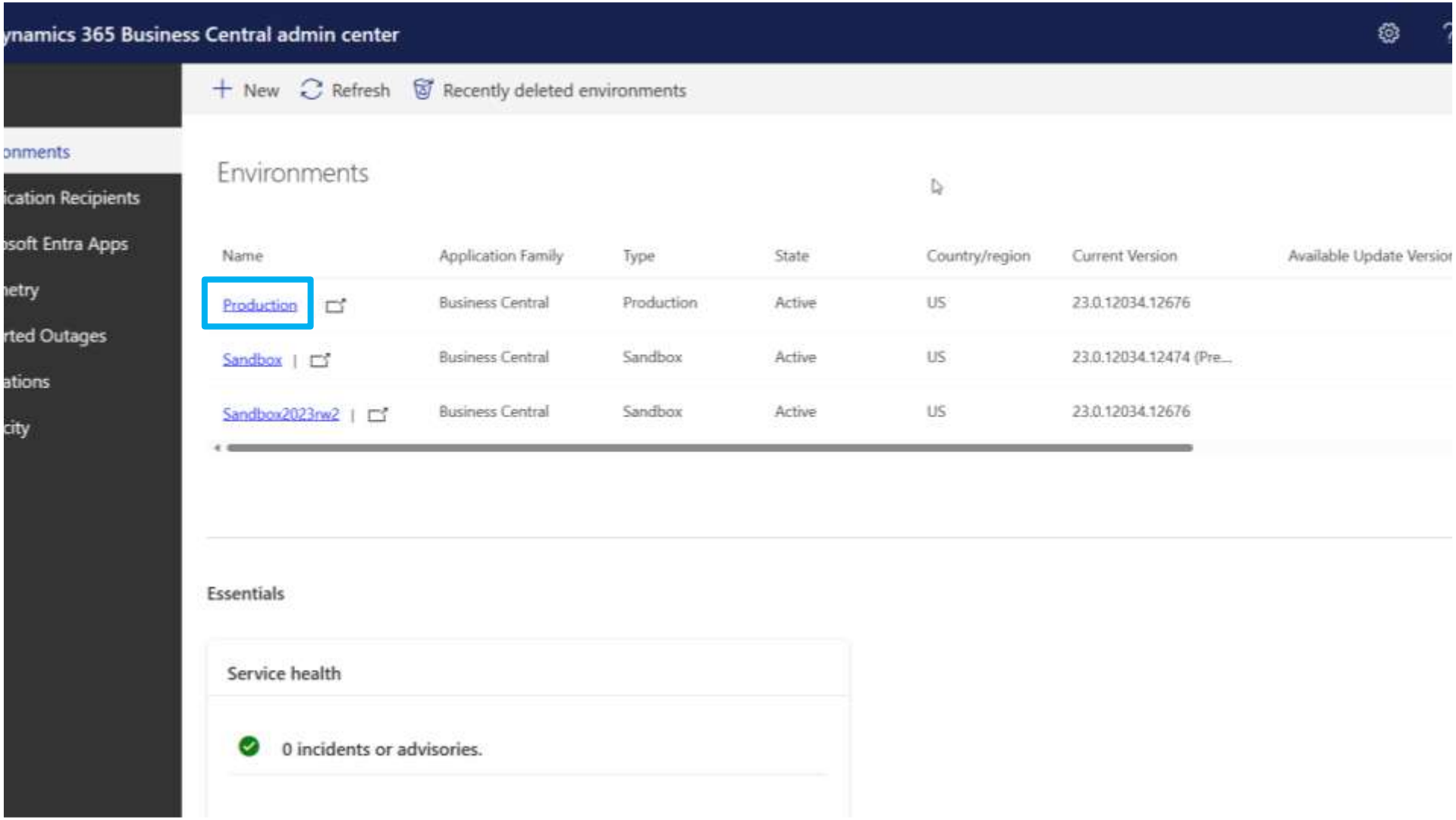
#41: When to update apps after a Business Central update



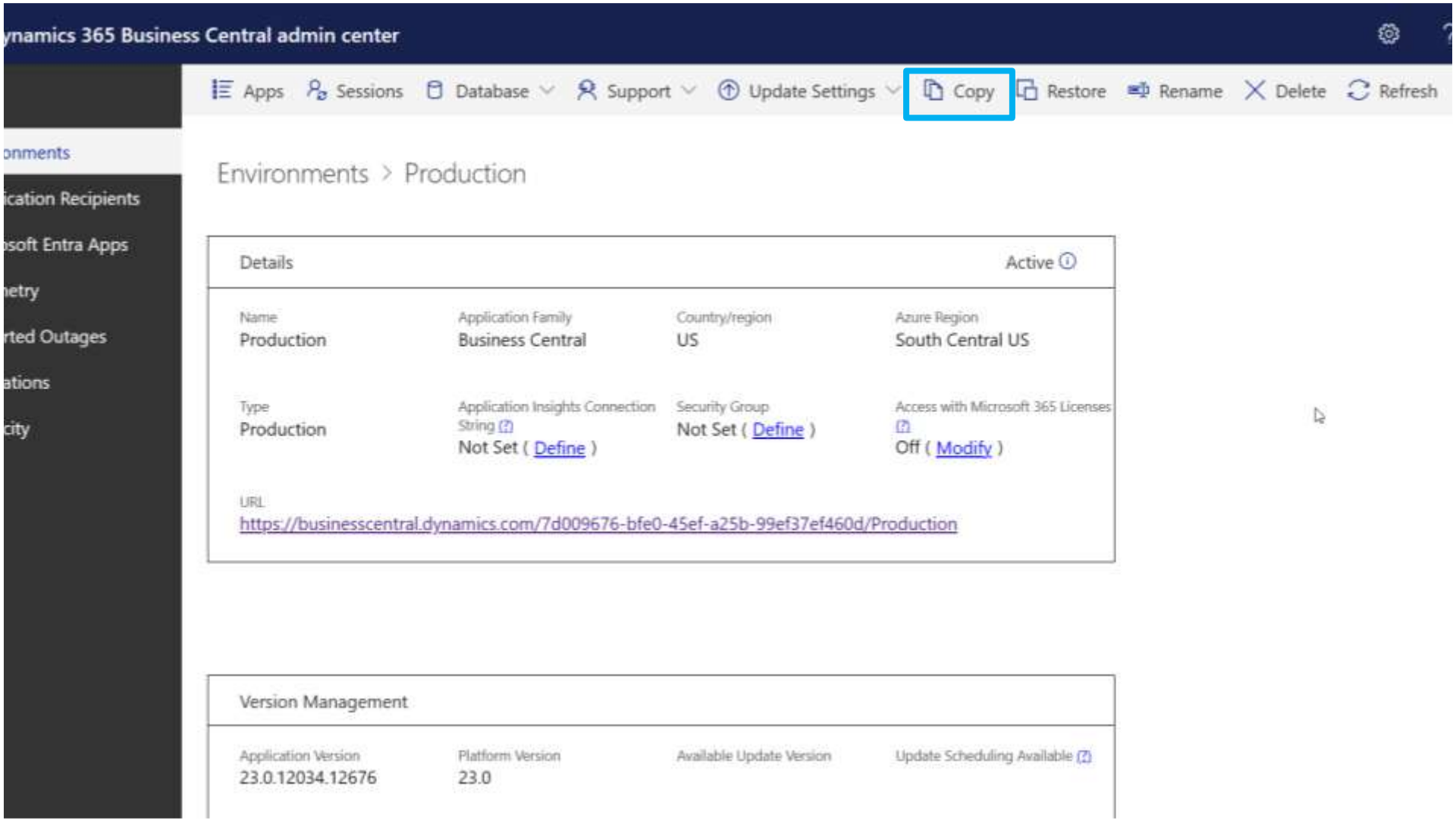


Tip # 42

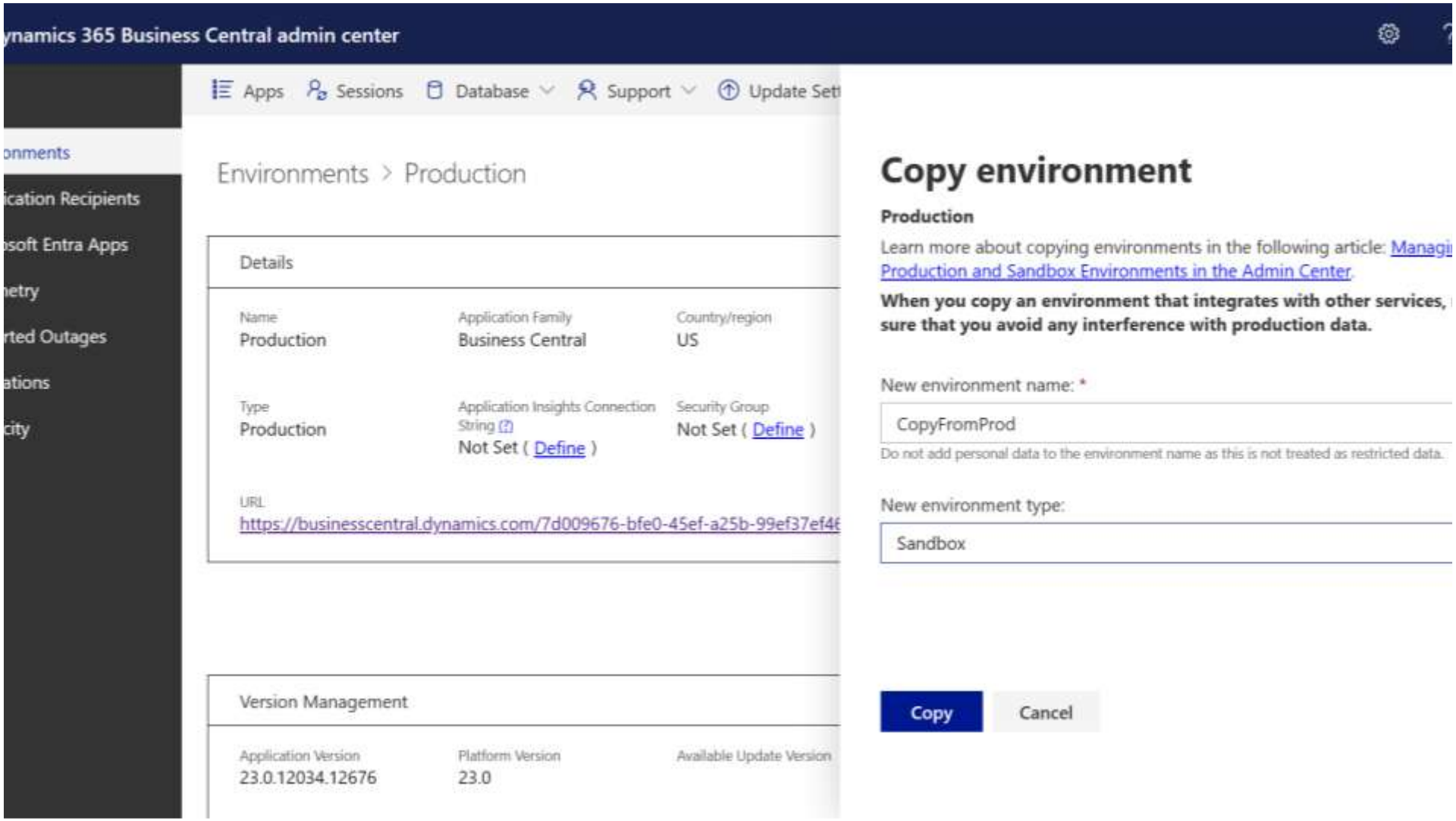
#42: Easily get a fresh sandbox based off your production environment



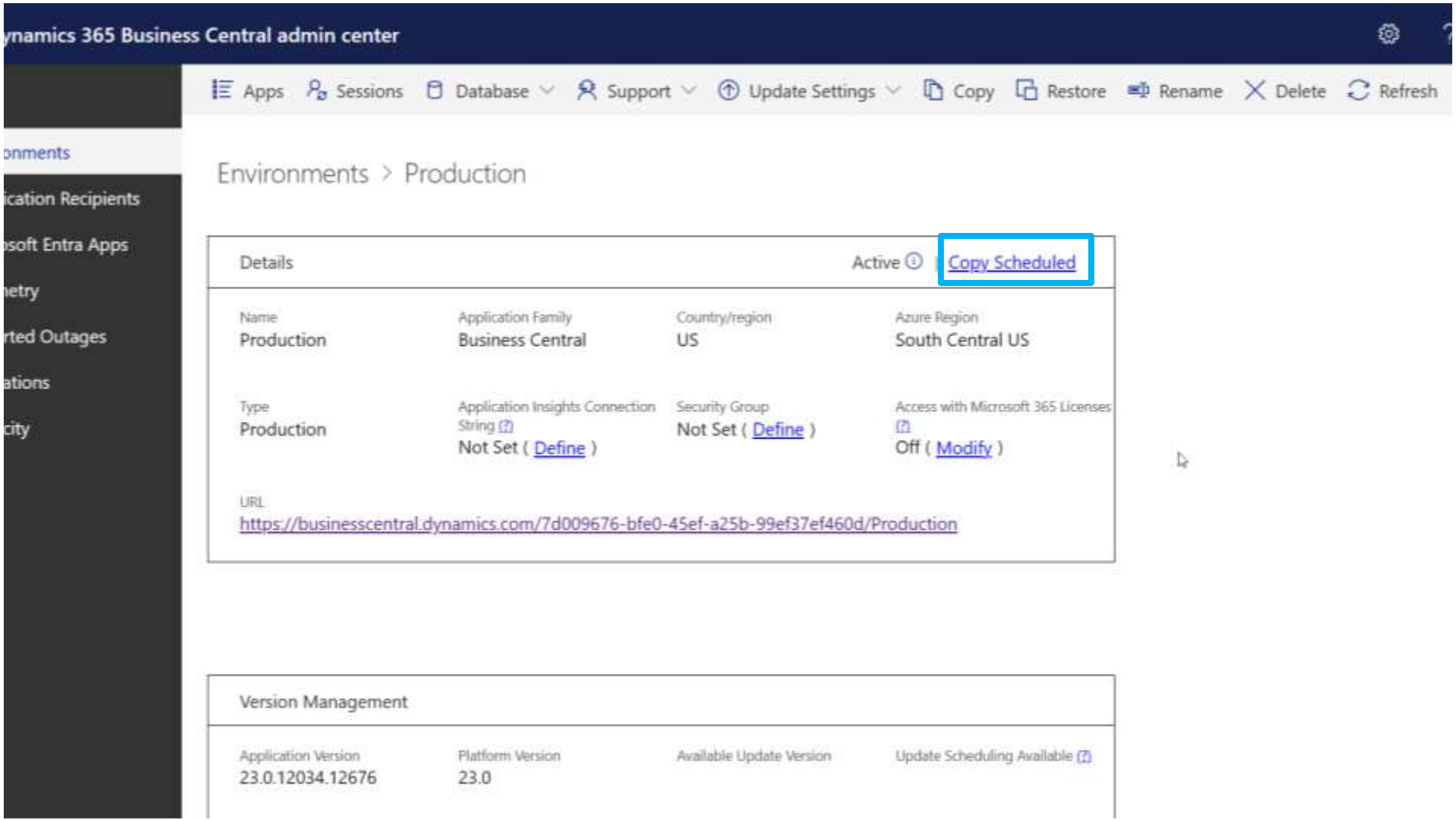
#42: Easily get a fresh sandbox based off your production environment



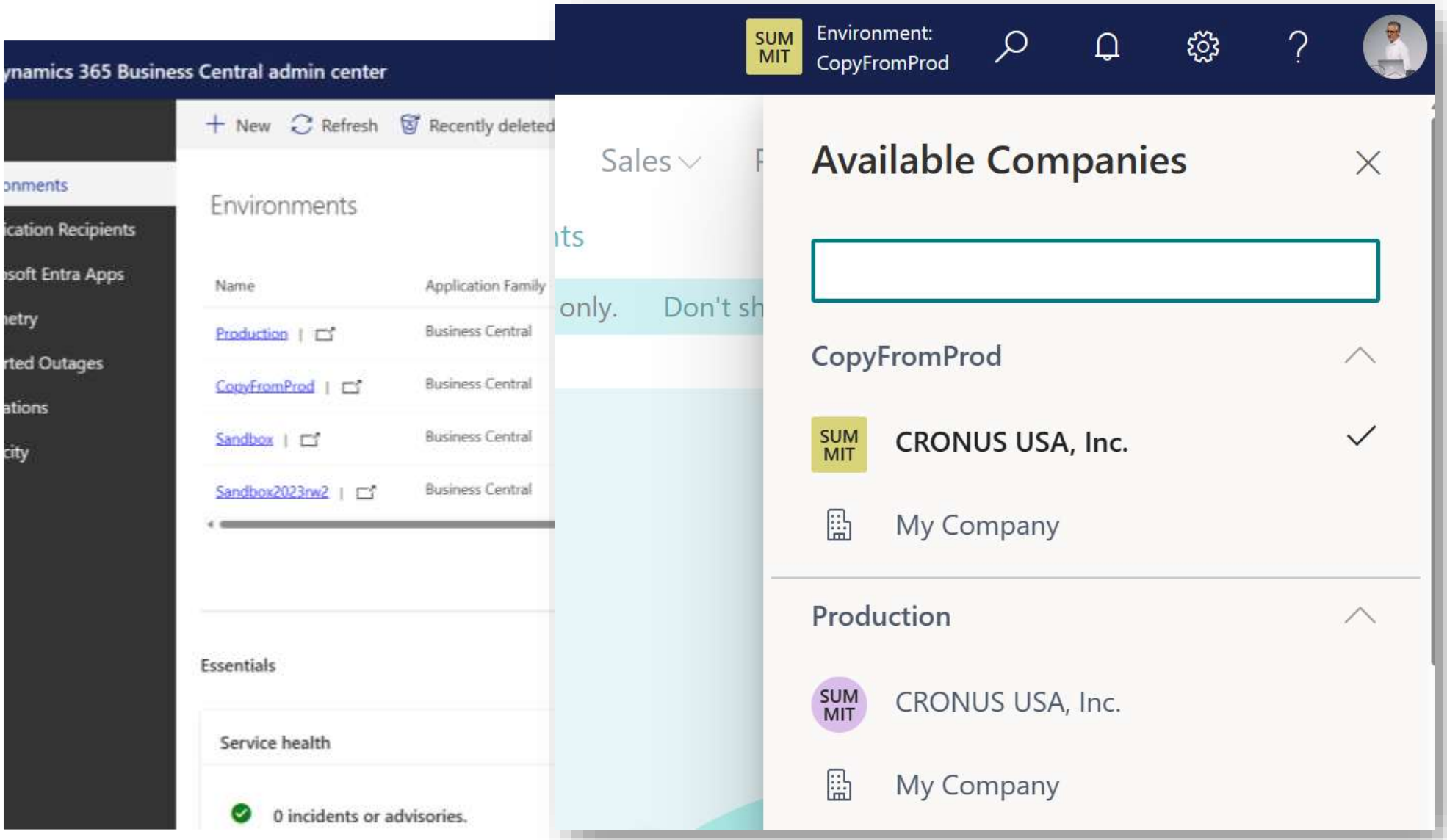
#42: Easily get a fresh sandbox based off your production environment



#42: Easily get a fresh sandbox based off your production environment



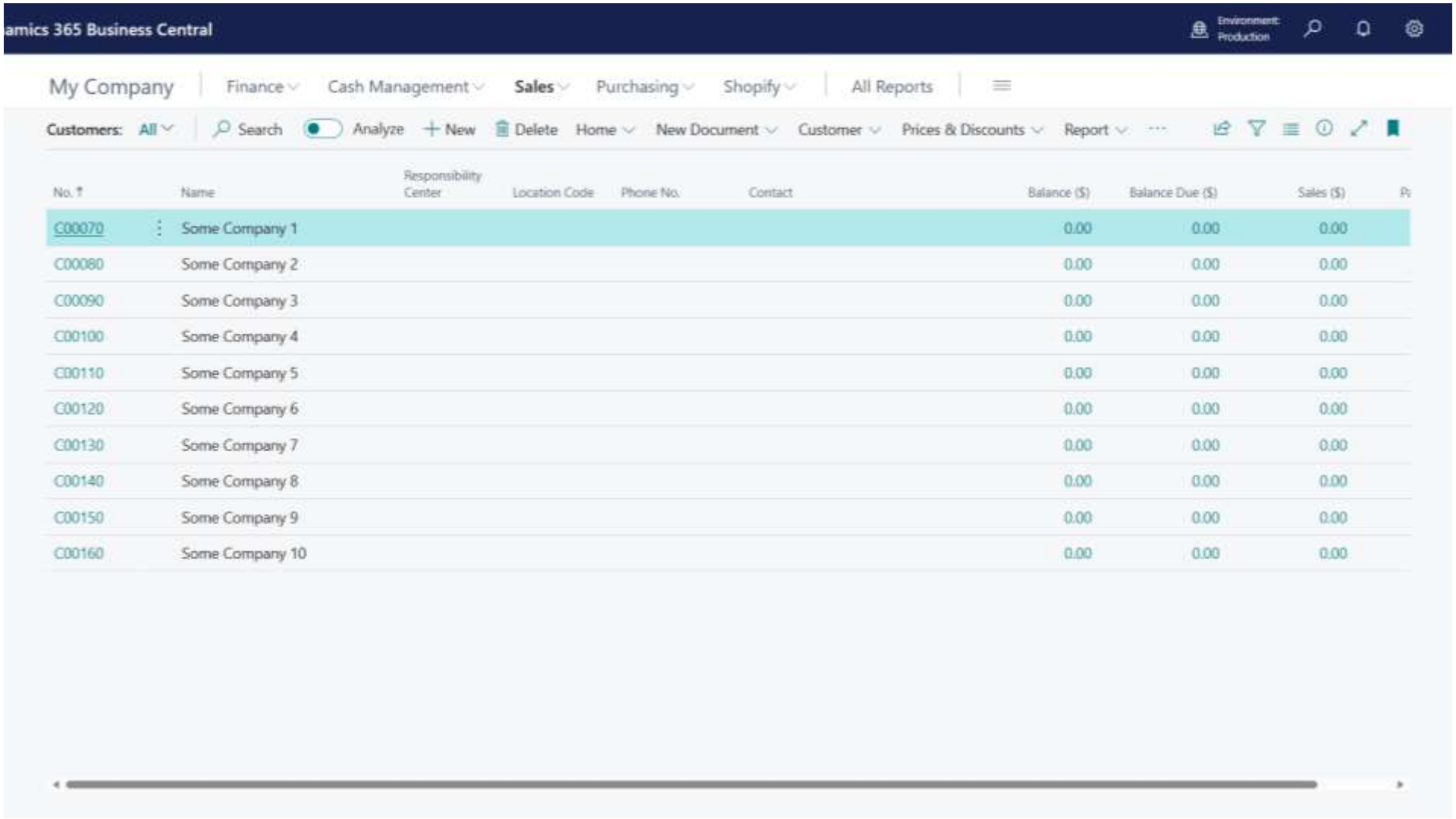
#42: Easily get a fresh sandbox based off your production environment



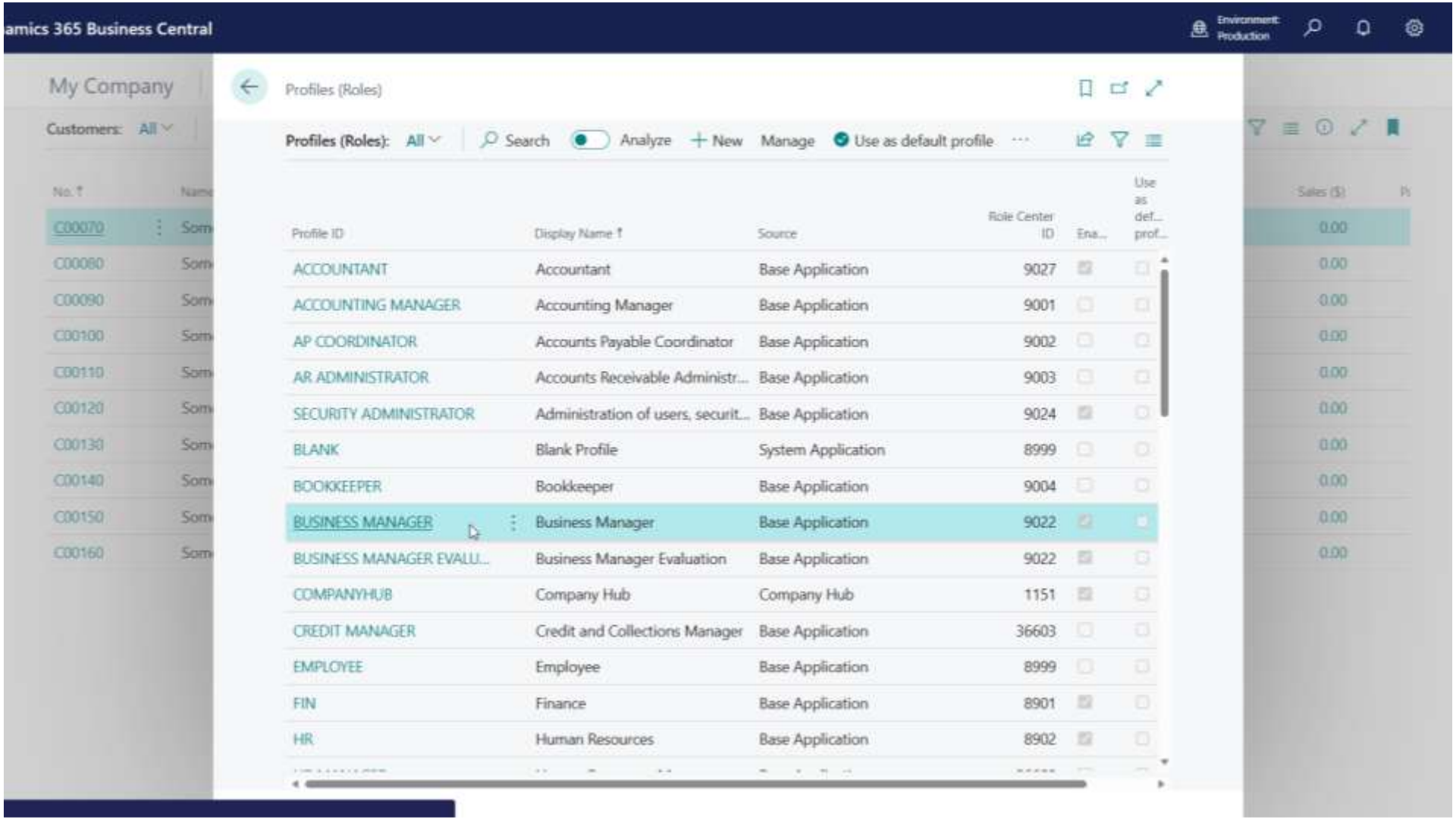


Tip # 43

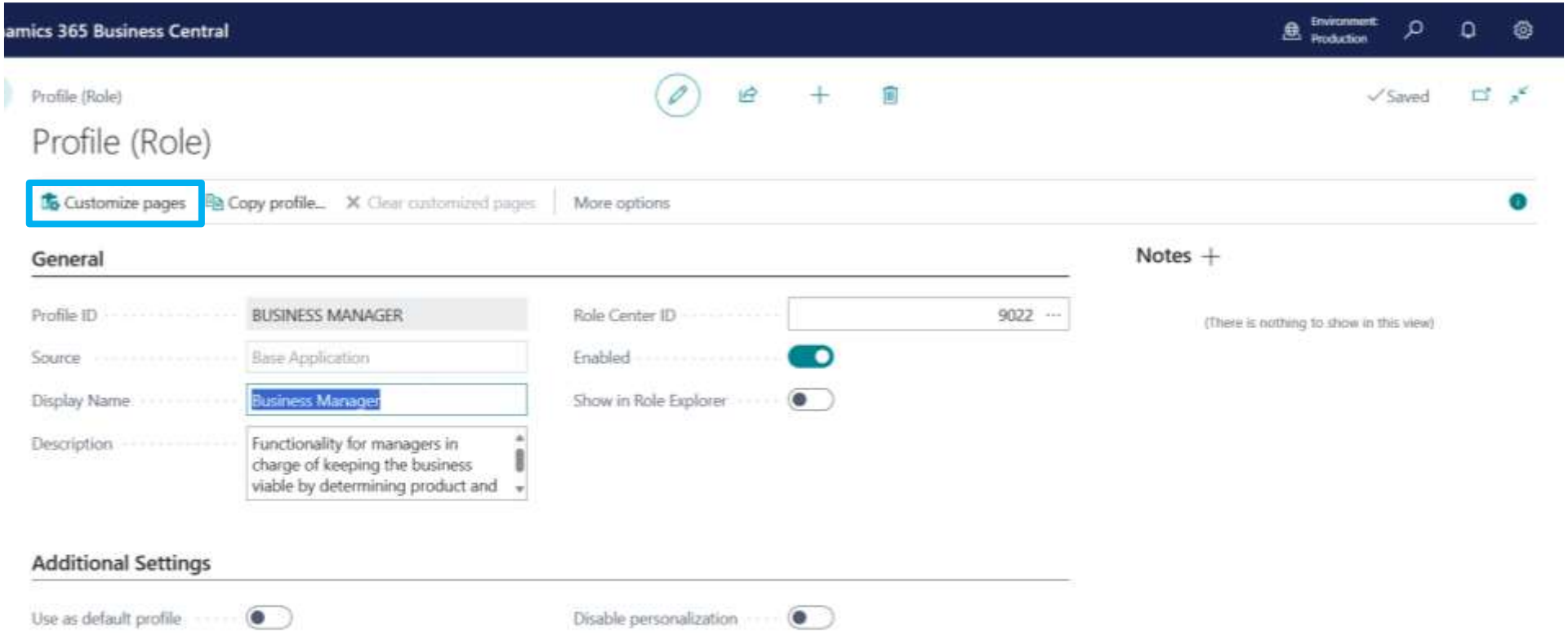
#43: Add any (table) field to the page



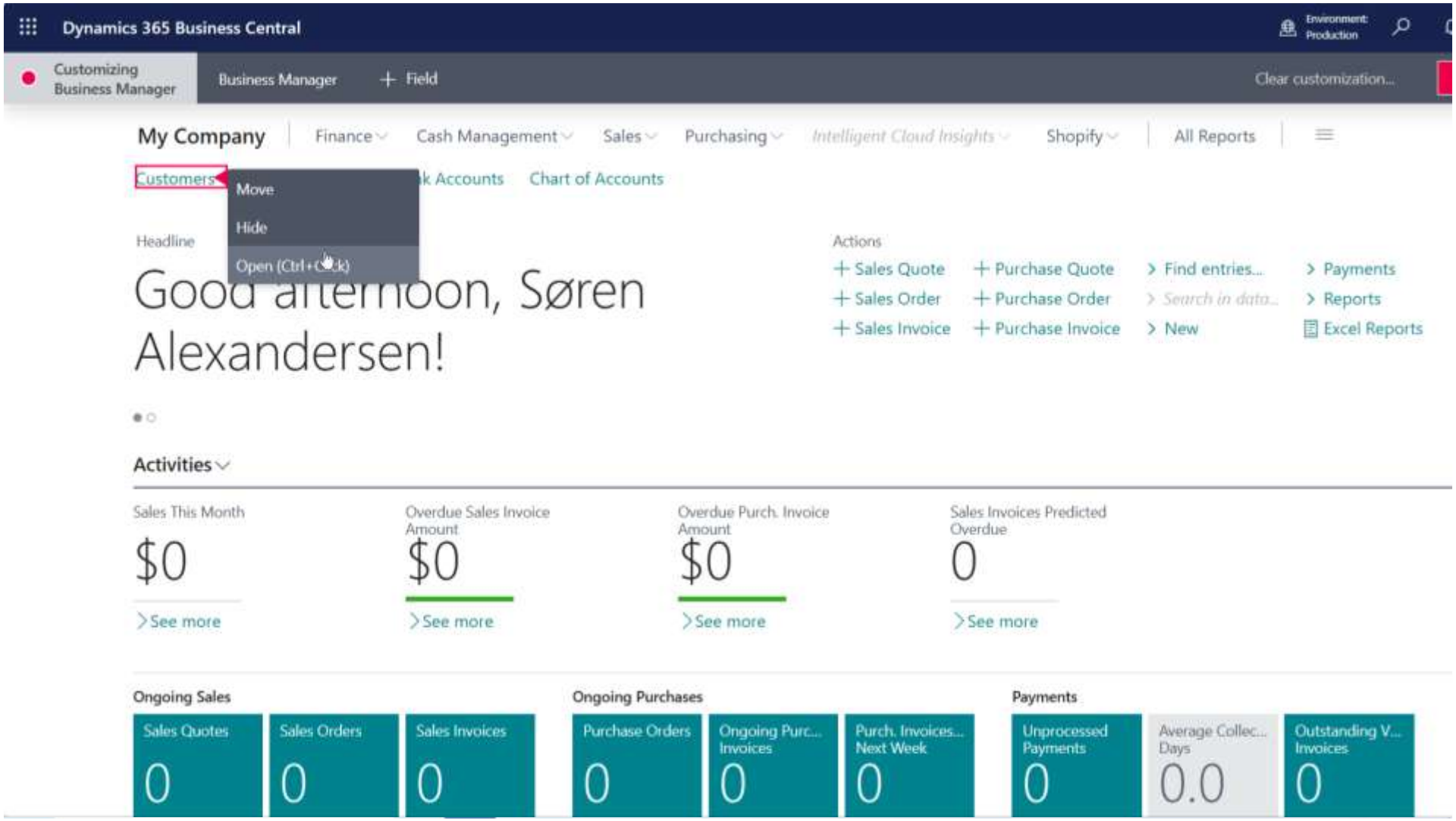
#43: Add any (table) field to the page



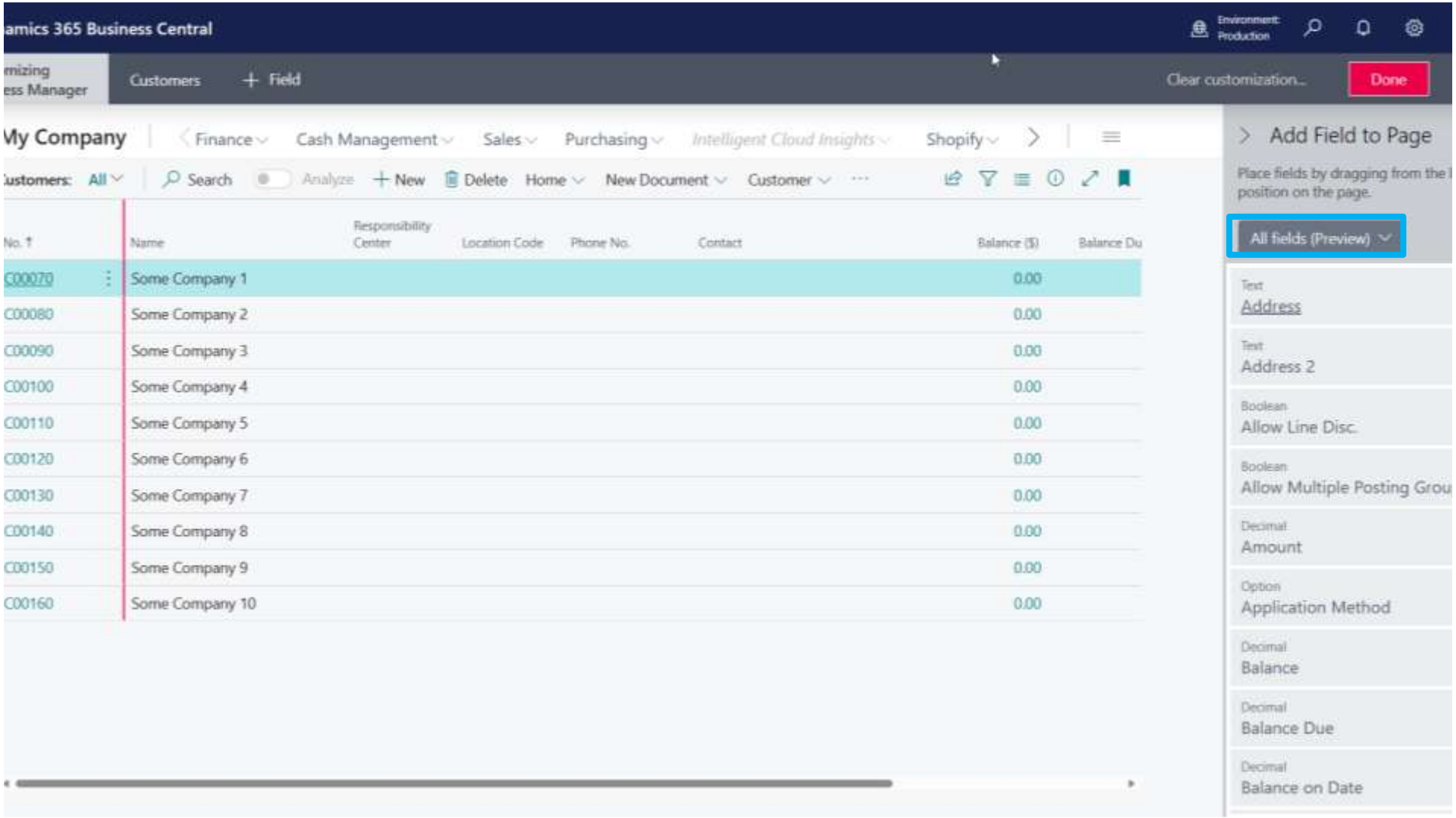
#43: Add any (table) field to the page



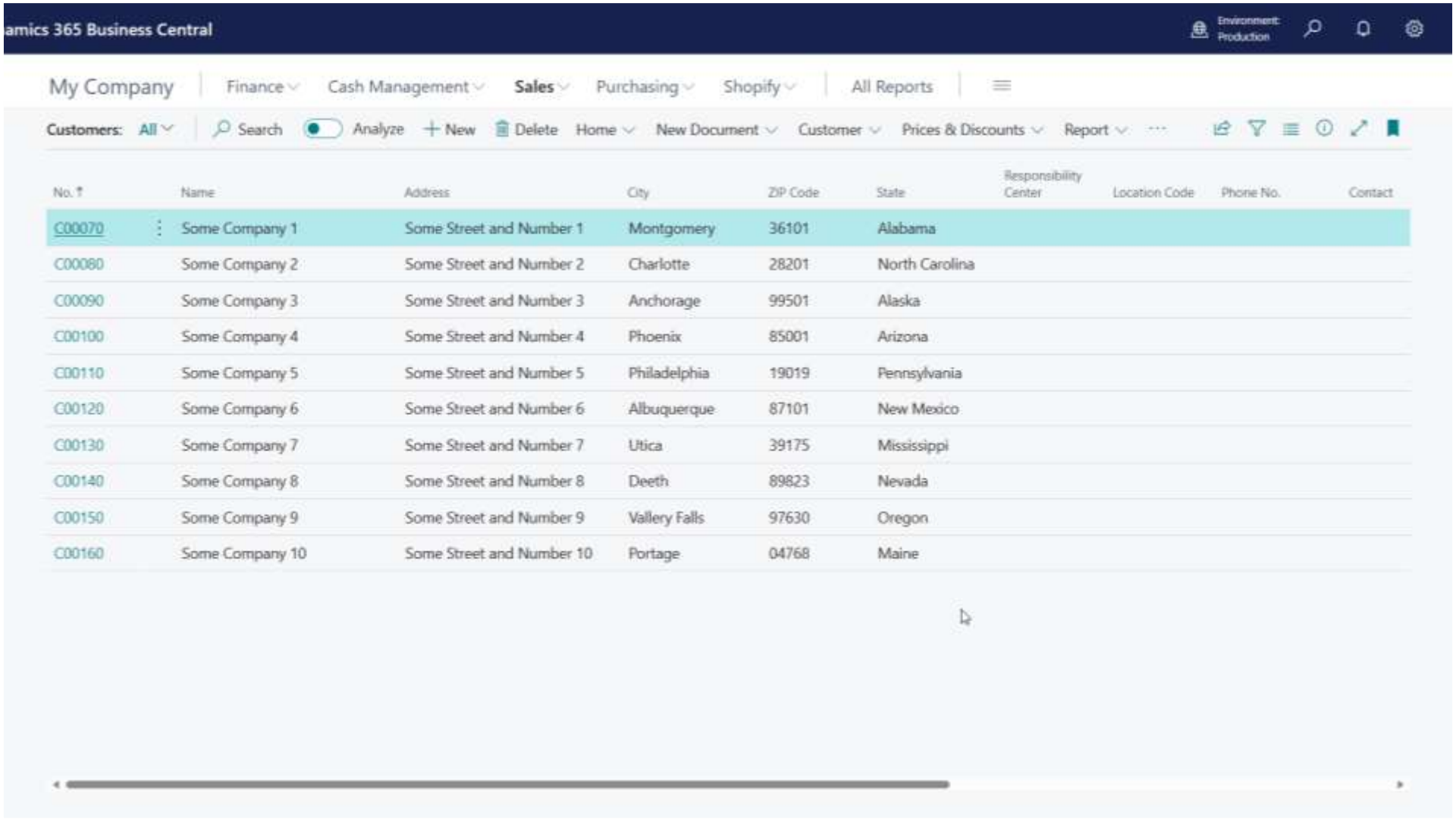
#43: Add any (table) field to the page



#43: Add any (table) field to the page



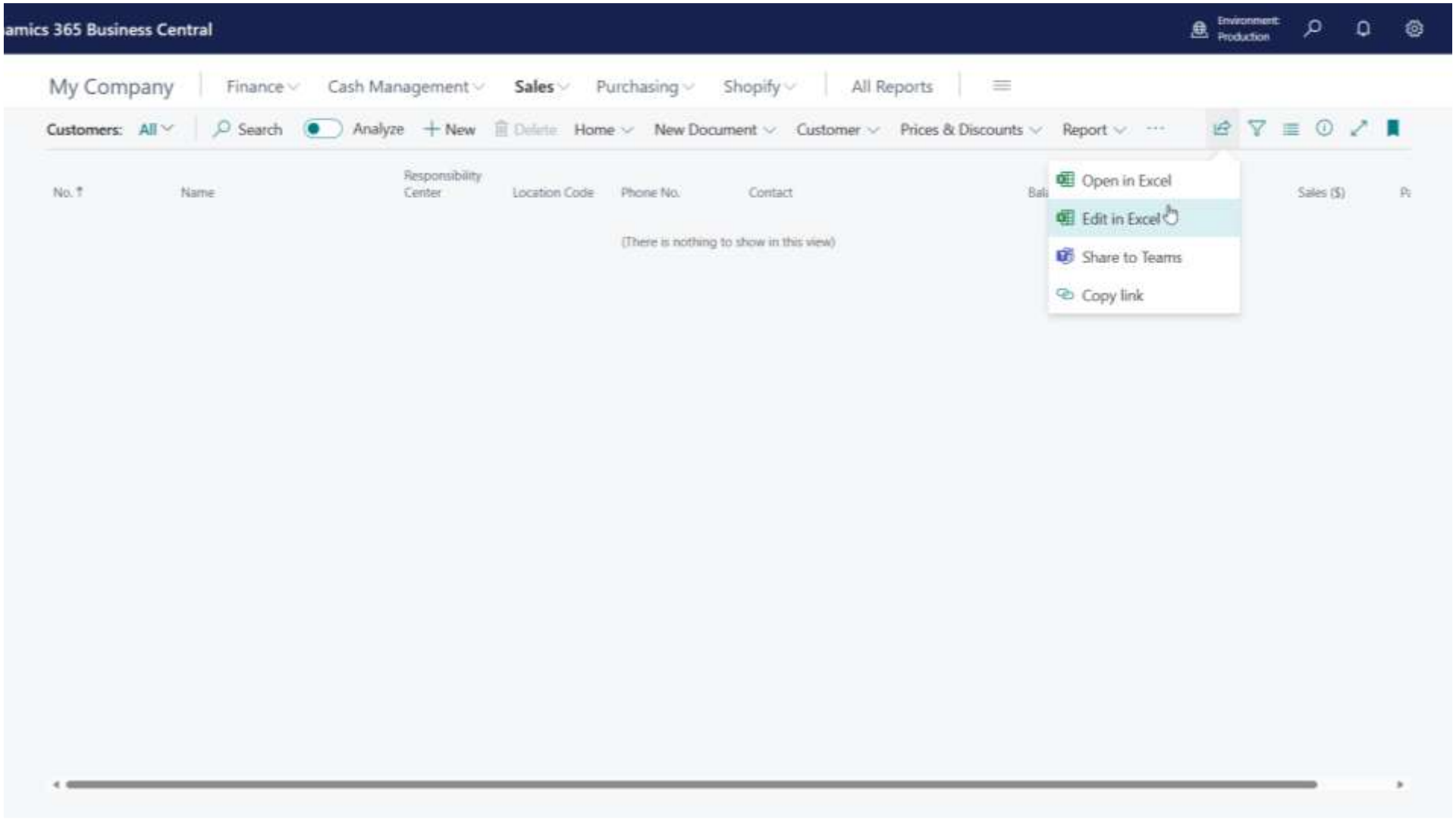
#43: Add any (table) field to the page



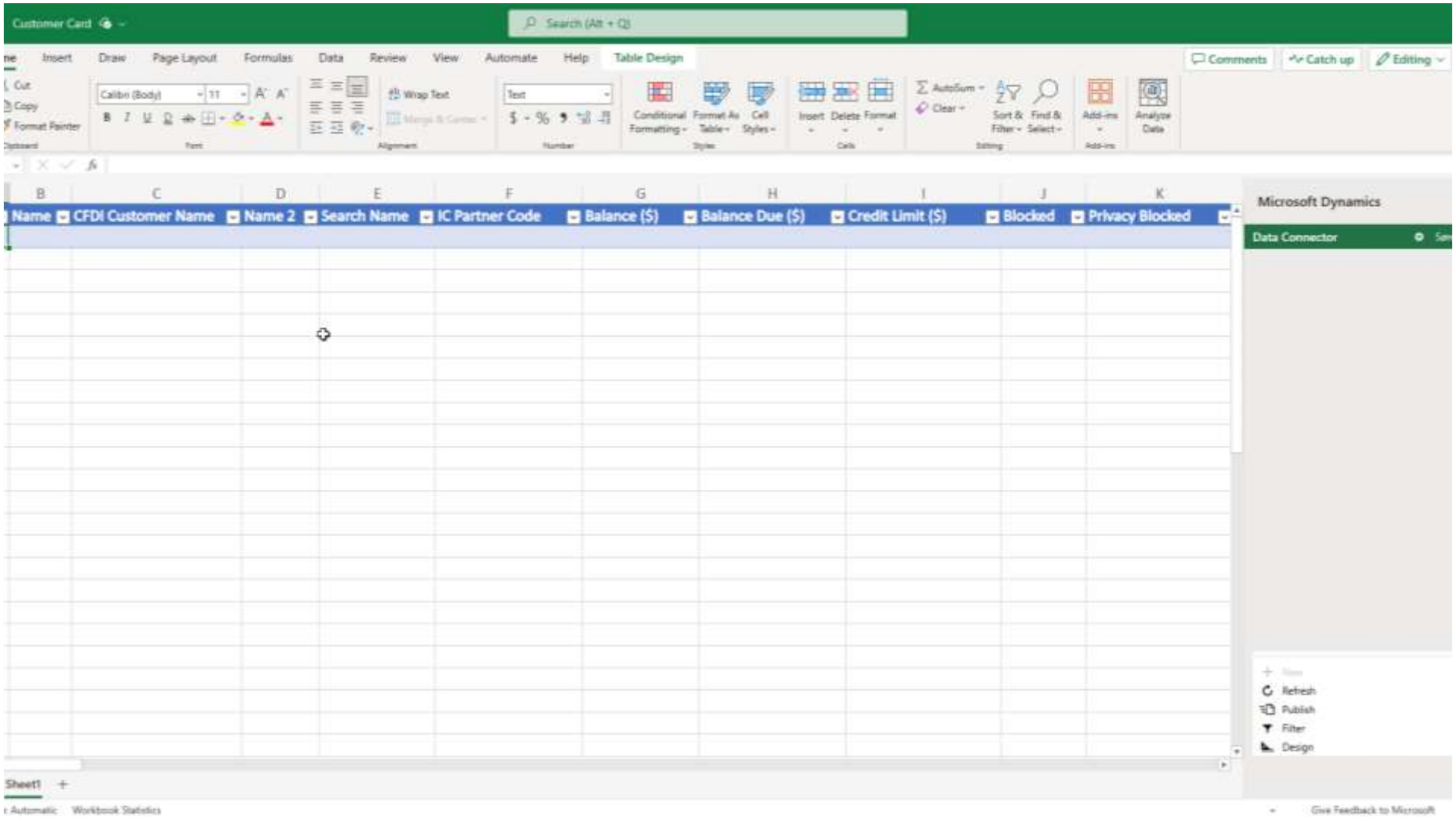


Tip # 44

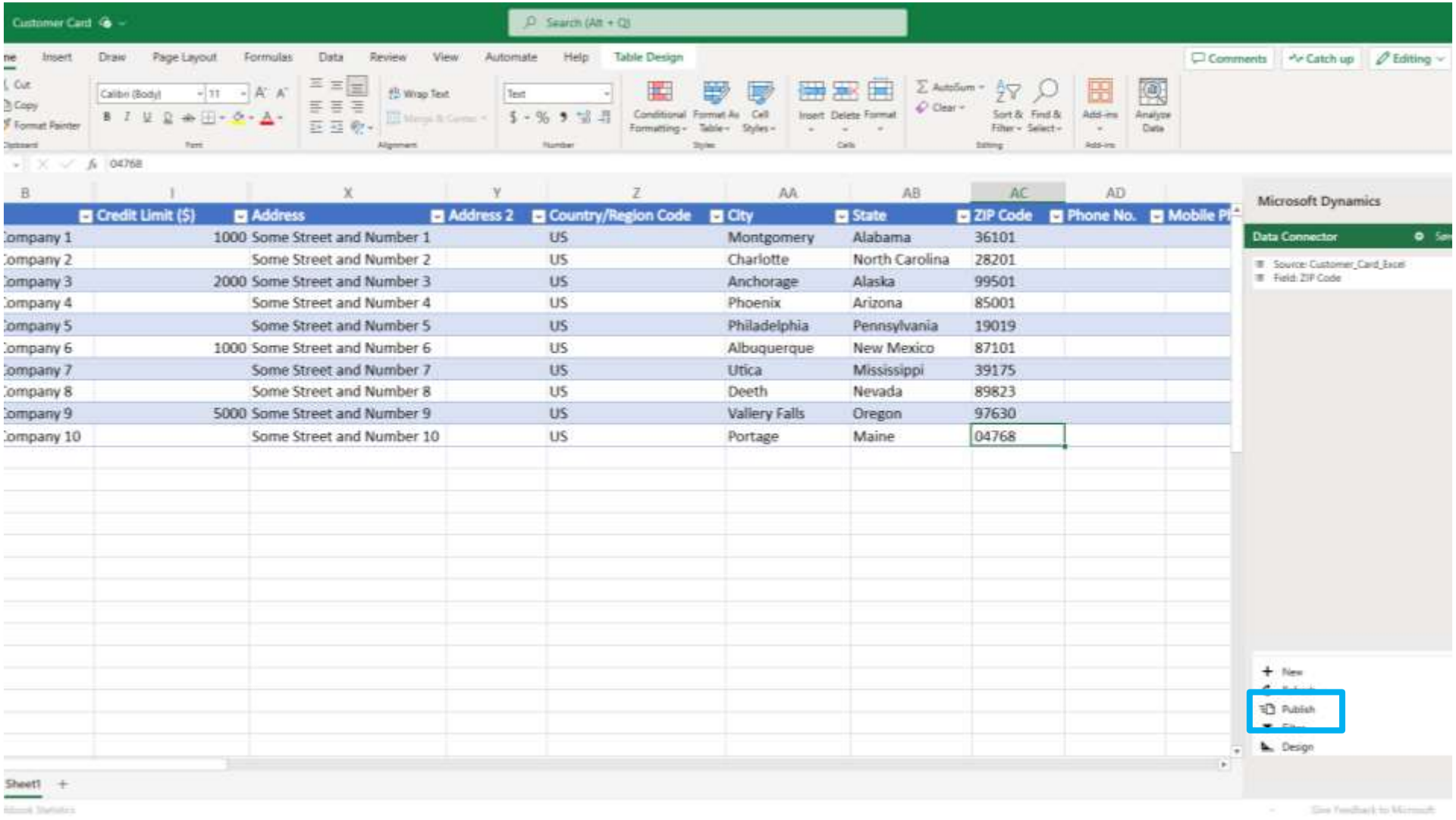
#44: Easily import master data



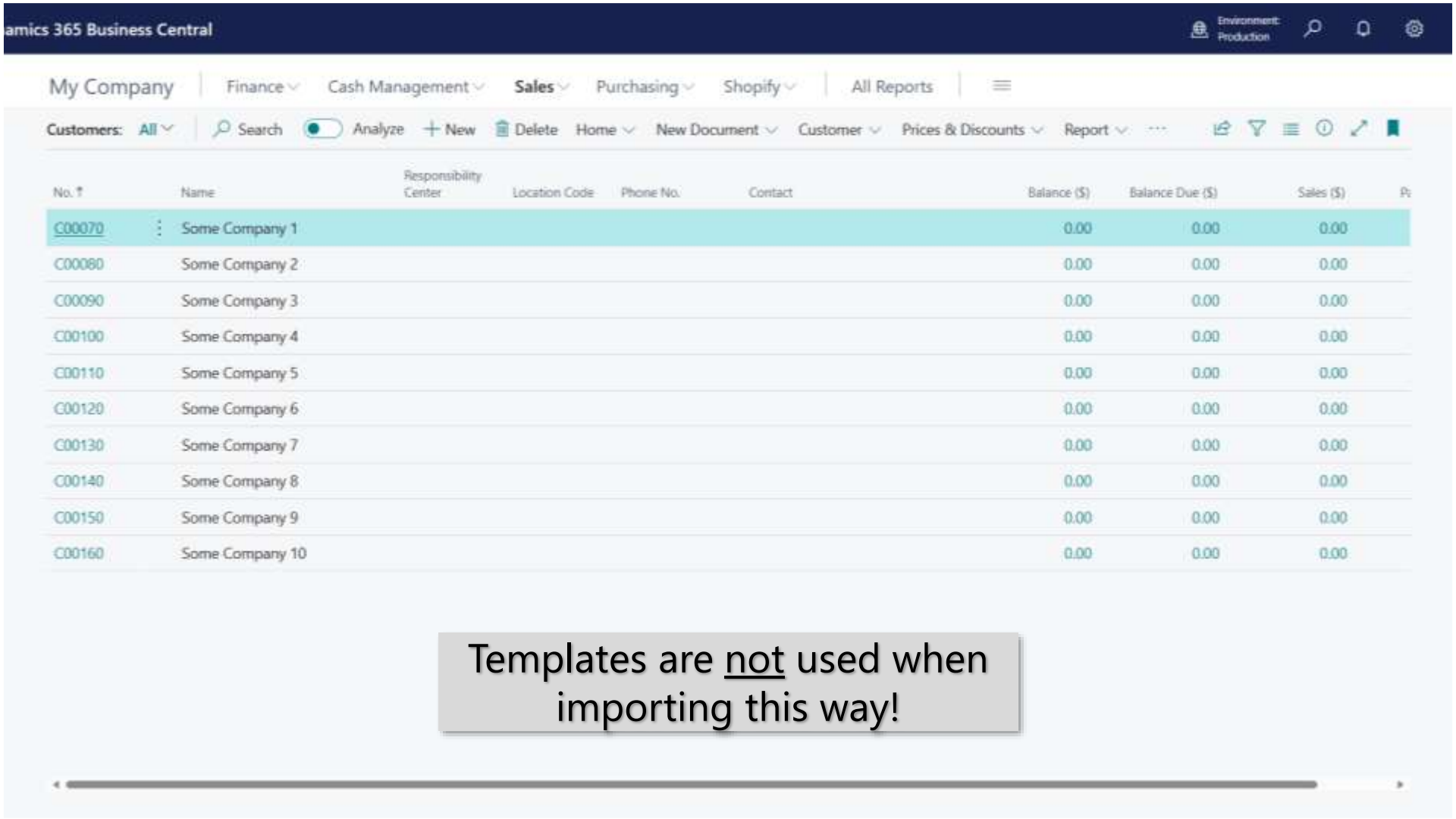
#44: Easily import master data



#44: Easily import master data



#44: Easily import master data

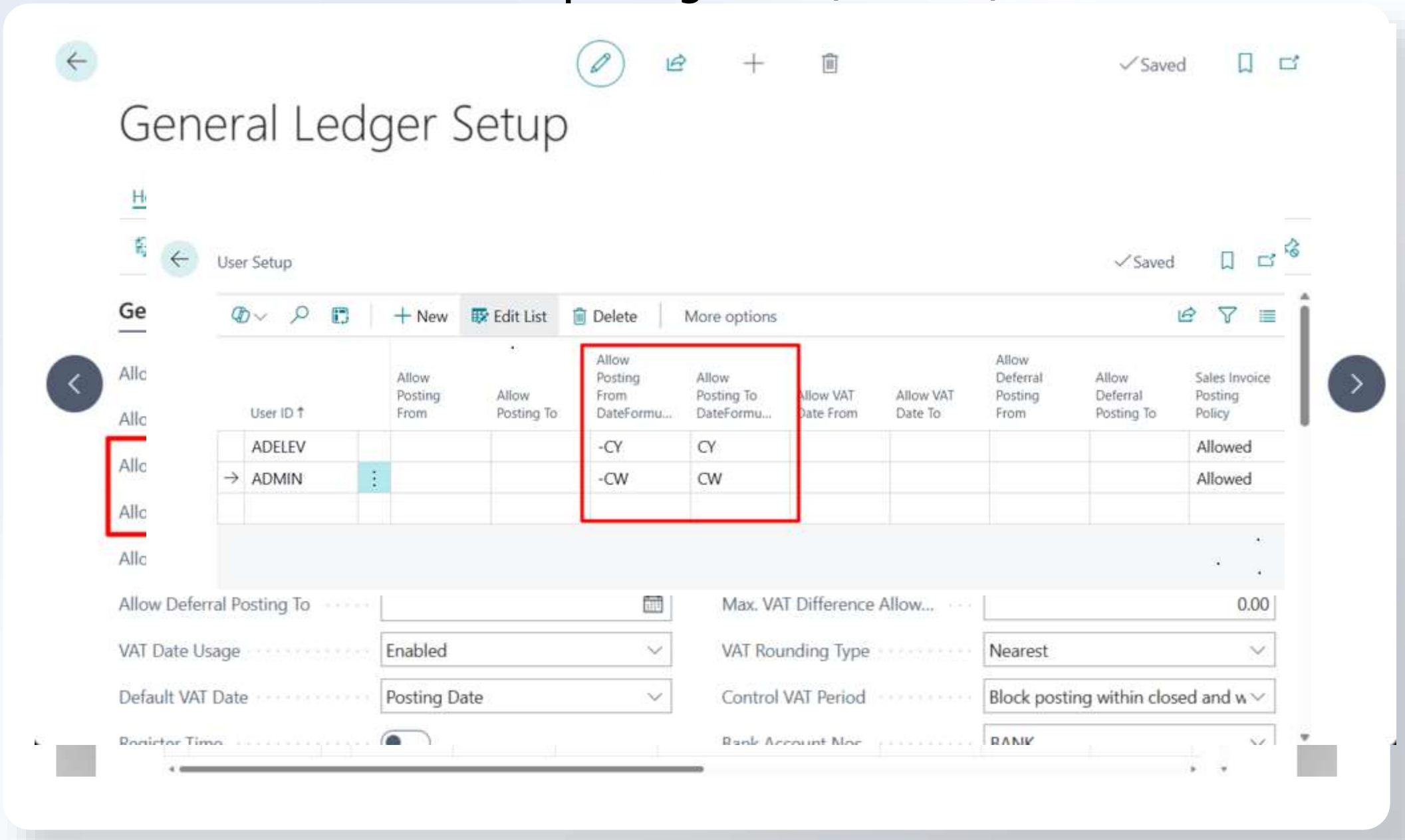




Tip # 45

#7 Jump to entity

#45: Use Date formula in Allowed posting dates (From 28)



Learn What's New Faster With BCLE

Business Central Launch Edition 2026 release wave 2

One-stop shop to watch what's new in this release wave

Find all the **30+ What's new readiness sessions** on our official Business Central YouTube Channel.

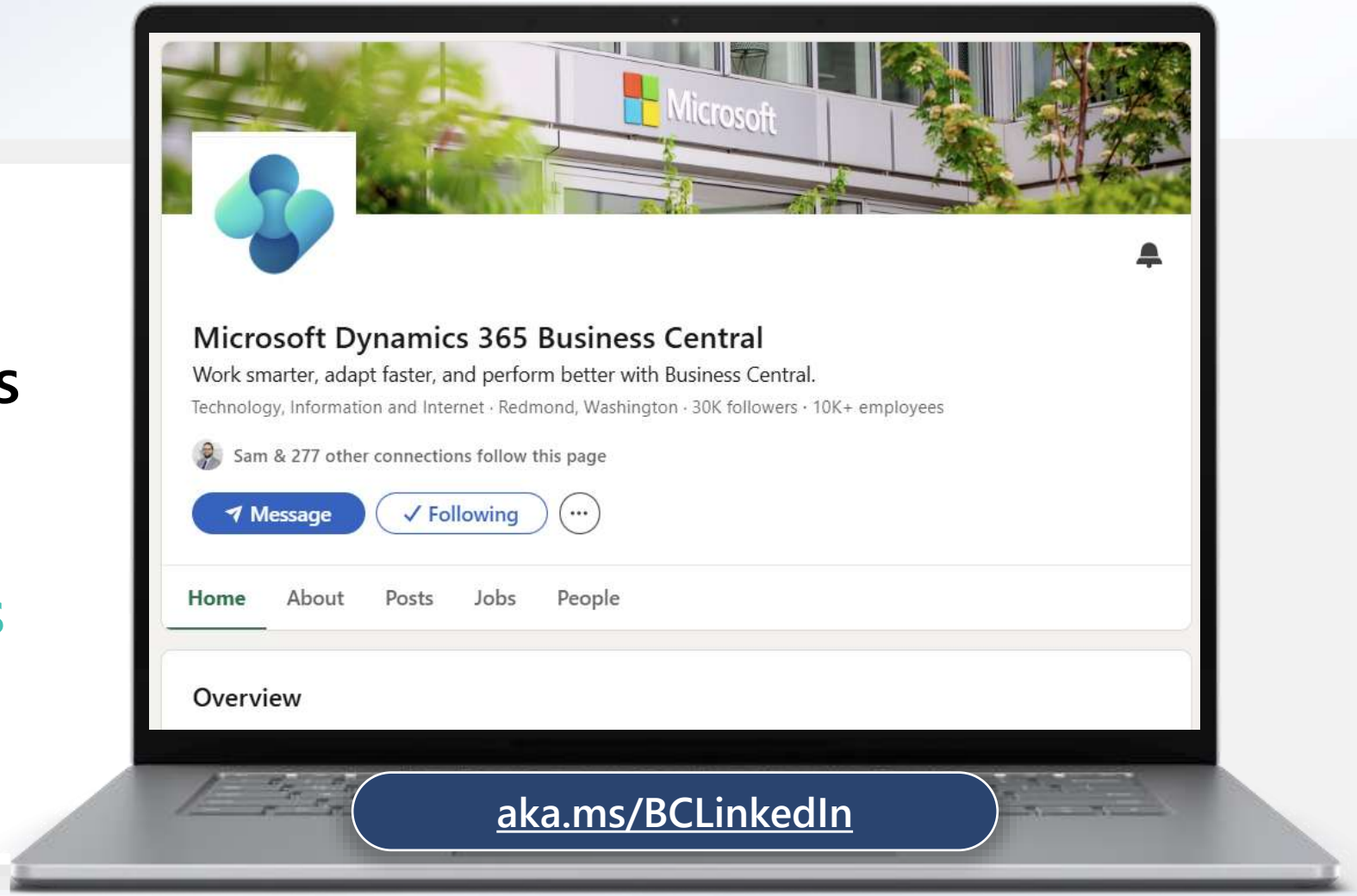
Learn what's new faster in every release!



aka.ms/BCLE

LinkedIn

Follow the weekly news and announcements on the Microsoft Dynamics 365 Business Central page



Watch more videos on YouTube

One-stop shop to watch Business Central videos:

- What is new
- Copilot and AI
- Short tips and tricks
- Technical deep dives
- Under the Hood podcast series



Microsoft Dynamics 365

Dynamics User Group Norge

DYNUG

TAK

Peter Jakobsen

Architect, Business Central
Microsoft Global Field and Partner Center of Excellence

Peter.Jakobsen@microsoft.com

https://www.linkedin.com/in/peter-jakobsen-bc-rocks