

Agents in Microsoft Dynamics 365 Business Central



Intelligence on tap will rewire business. Every leader needs a new blueprint.

82%

of leaders say this is a pivotal year to rethink key aspects of strategy and operations

81%

say they expect agents to be moderately or extensively integrated into their company's AI strategy in the next 12–18 months

82%

of leaders expect to use agents to meet the demand for more workforce capacity

46%

Nearly half of leaders say their companies are already using agents to fully automate workflows or processes

Types of agents in Business Central

Agents are AI assistants that can help optimize business processes and enhance productivity using large language models and generative AI



Use built-in agents

Use built-in agents in Business Central, working independently under your directions to streamline your workflows and drive efficiencies



Build your own agent

Connect to your data in Business Central and publish on channels such as Microsoft Teams or your website

Arten von Agents in Business Central



Agents sind KI-Assistenten die dabei helfen, Geschäftsprozesse zu optimieren und die Produktivität zu steigern unter Einsatz von Large Language Models und generativer KI



Verwendung integrierter Agents

Nutzen Sie vorkonfigurierte Agents in Business Central, die selbstständig nach Ihren Vorgaben arbeiten, um Workflows zu vereinfachen und Effizienzgewinne zu erzielen.



Eigene Agents erstellen

Verbinden Sie diese mit Ihren Daten in Business Central und stellen Sie sie über Kanäle wie Microsoft Teams oder Ihre Website bereit.

Level 1

Level 2

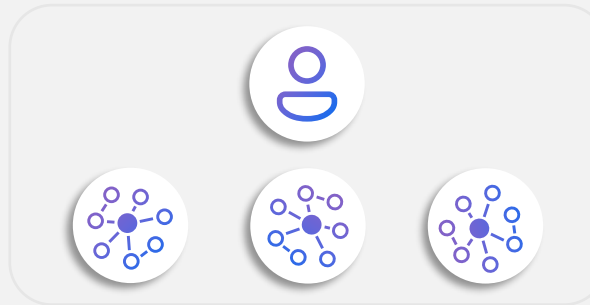
Level 3

Human with an assistant



Every employee has an AI assistant that helps them work better and faster

Human-agent teams



Agents join teams as "digital colleagues," taking on specific tasks at human direction

Human-led, agent-operated



Humans set direction and agents execute business processes and workflows, checking in as needed

Level 1

Level 2

Level 3

Human with an assistant



Chat
Autofill
E-document matching
Bank account reconciliation
Suggest GHG emissions
Summarize...and many more

Every employee has an AI assistant that helps them work better and faster

Human-agent teams



Sales Order Agent
Payables Agent
... more to come!

Agents join teams as “digital colleagues,” taking on specific tasks at human direction

Human-led, agent-operated

Humans set direction and agents execute business processes and workflows, checking in as needed

Agents in Business Central



Sales Order Agent

Communicates with customers

Interprets customer request

Sends quotes

Creates sales orders



Payables Agent

Receives vendor invoices

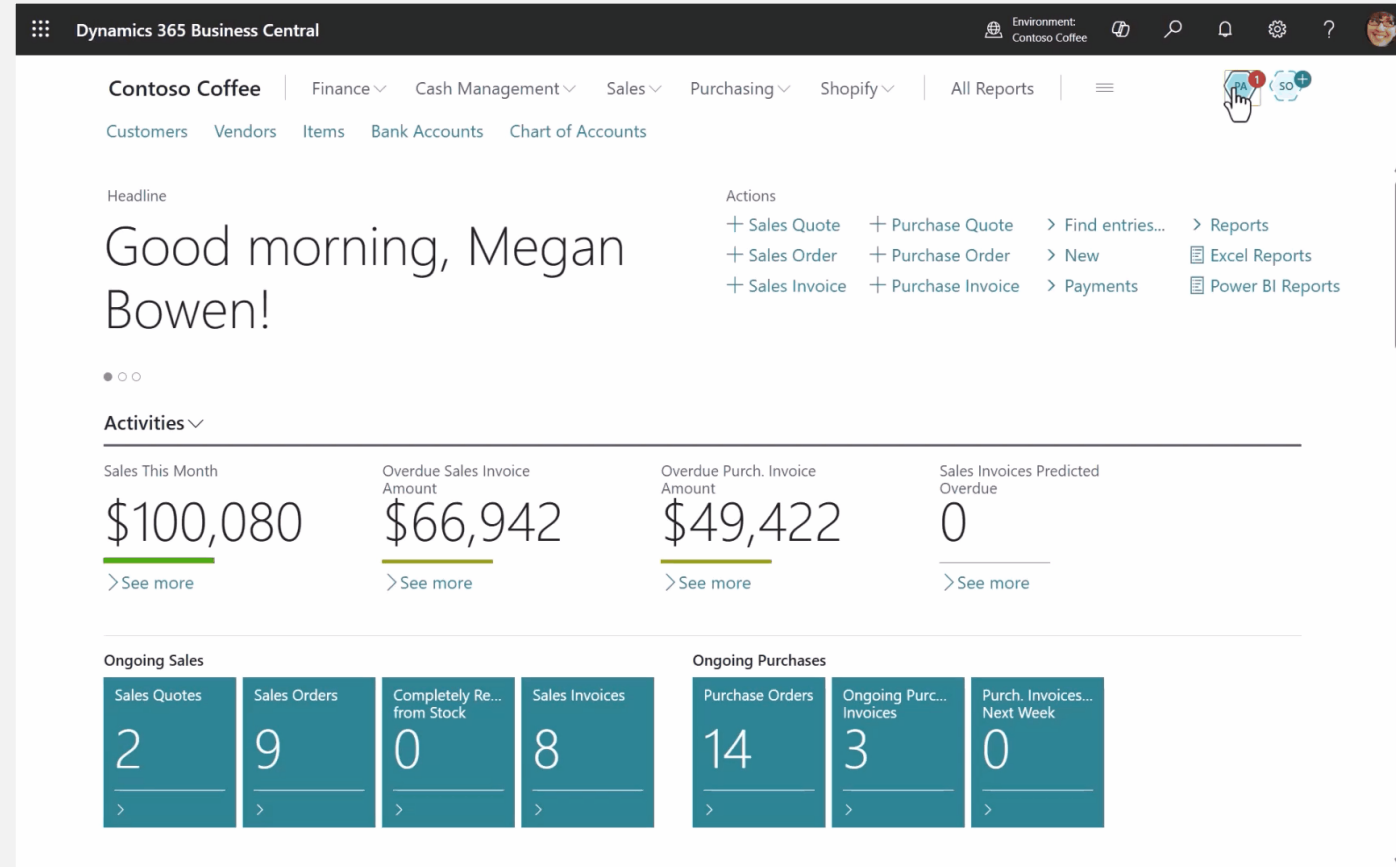
Captures invoice information

Registers invoices according to preference, and purchase invoice history

Accounts Payable is the backbone of quality data

Payables Agent

The first line of defense
against bad data,
inaccurate reporting
and time-consuming
rework



Vereinfachung in der Kreditorenbuchhaltung

Payables Agent

Agent gegen
fehlerhafte Eingaben
und zeitaufwändige
Nacharbeiten

The screenshot displays the Dynamics 365 Business Central interface for the 'Contoso Coffee' environment. The top navigation bar includes the 'Dynamics 365 Business Central' logo, the environment name 'Contoso Coffee', and various icons for search, notifications, settings, and help. Below the navigation bar, the 'Contoso Coffee' header is followed by a list of tabs: Finance, Cash Management, Sales, Purchasing, Shopify, and All Reports. The main content area features a 'Headline' section with a greeting 'Good morning, Megan Bowen!' and a list of actions: Sales Quote, Sales Order, Sales Invoice, Purchase Quote, Purchase Order, Purchase Invoice, Find entries..., New, Payments, Reports, Excel Reports, and Power BI Reports. Below the headline, the 'Activities' section displays four key metrics: Sales This Month (\$100,080), Overdue Sales Invoice Amount (\$66,942), Overdue Purch. Invoice Amount (\$49,422), and Sales Invoices Predicted Overdue (0). Each metric has a 'See more' link. At the bottom, the 'Ongoing Sales' and 'Ongoing Purchases' sections show counts for various document types: Sales Quotes (2), Sales Orders (9), Completely Re... from Stock (0), Sales Invoices (8), Purchase Orders (14), Ongoing Purc... Invoices (3), and Purch. Invoices... Next Week (0).

Dynamics 365 Business Central

Environment: Contoso Coffee

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

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

Headline

Good morning, Megan Bowen!

Actions

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

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$100,080	\$66,942	\$49,422	0
> See more	> See more	> See more	> See more

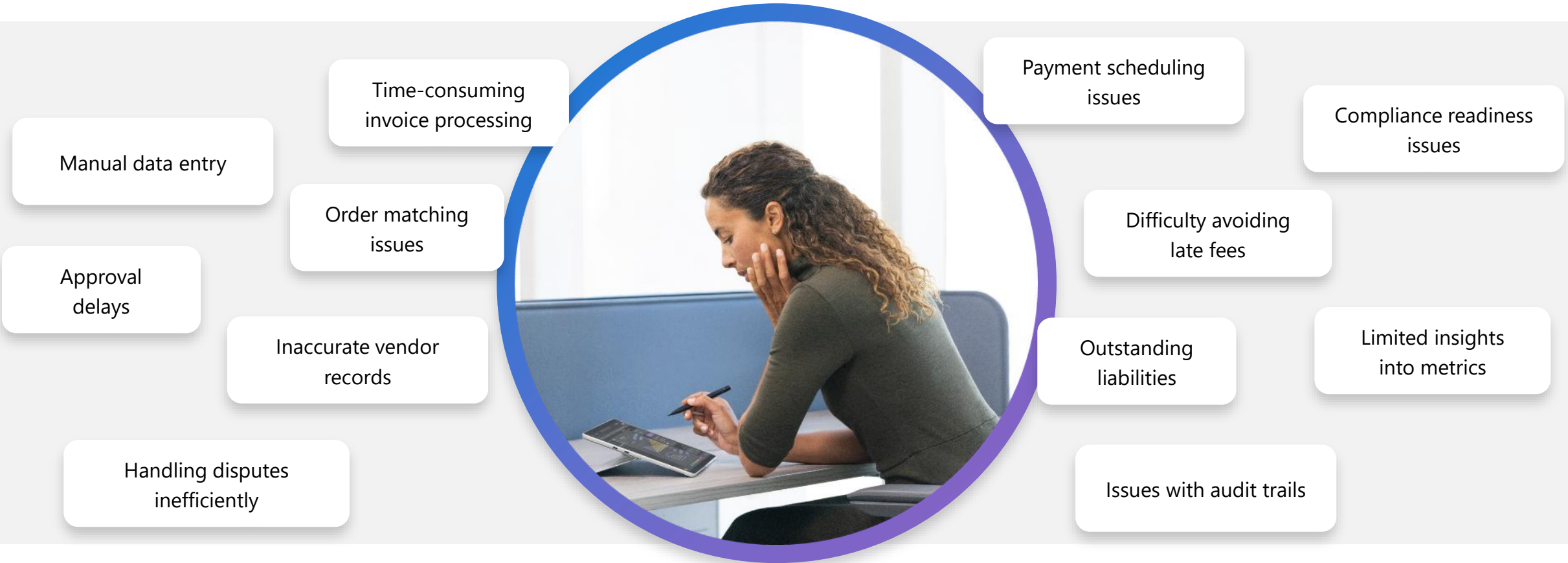
Ongoing Sales

Sales Quotes	Sales Orders	Completely Re... from Stock	Sales Invoices
2	9	0	8
>	>	>	>

Ongoing Purchases

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

The bottlenecks in AP that slow down business performance



The Payables Agent solves decade-old challenges...



Eliminates errors

Errors in Accounts Payables (AP) cause time-consuming corrections in G/L and faulty financial statements.



Handles manual entry

Month-closing is a hassle when invoice dating is not handled right.



Ensures compliance

Staying on top of internal and external compliance can be stressful.



Helps make the right decisions

Risk of poor business decisions increases when financial data is not in order.

The Payables Agent solves decade-old challenges...



Eliminates errors

Payables Agent assists with coding invoices correctly and helps prevent and catch errors early.



Handles manual entry

Payables Agent assists with landing expenses in the proper period.



Ensures compliance

Payables Agent assists with adhering to the company's way of handling invoices, and learns from changes in posting behavior, always with agent supervisors in control.



Helps make the right decisions

Payables Agent helps with 3-way purchase order matching, to ensure invoices for inventory or services are aligned to what's been ordered.

Payables Agent

Uses AI to automate the full process of **capturing purchase invoices** from vendors and intelligently suggesting registration **according to purchase history**.



Sources electronic documents from e-mails



Checks for relevance



Detects and deflects irrelevant and malicious e-mail content



Processes documents with Azure Document Intelligence (OCR)



Creates draft documents and classifies expense type using AI



Matches vendor using AI



Creates a new vendor if instructed



Acts within defined permissions and profile (role)



Automatically resolves validation errors where possible



Brings humans in the loop to validate key decisions



Informs humans about the agent's reasoning



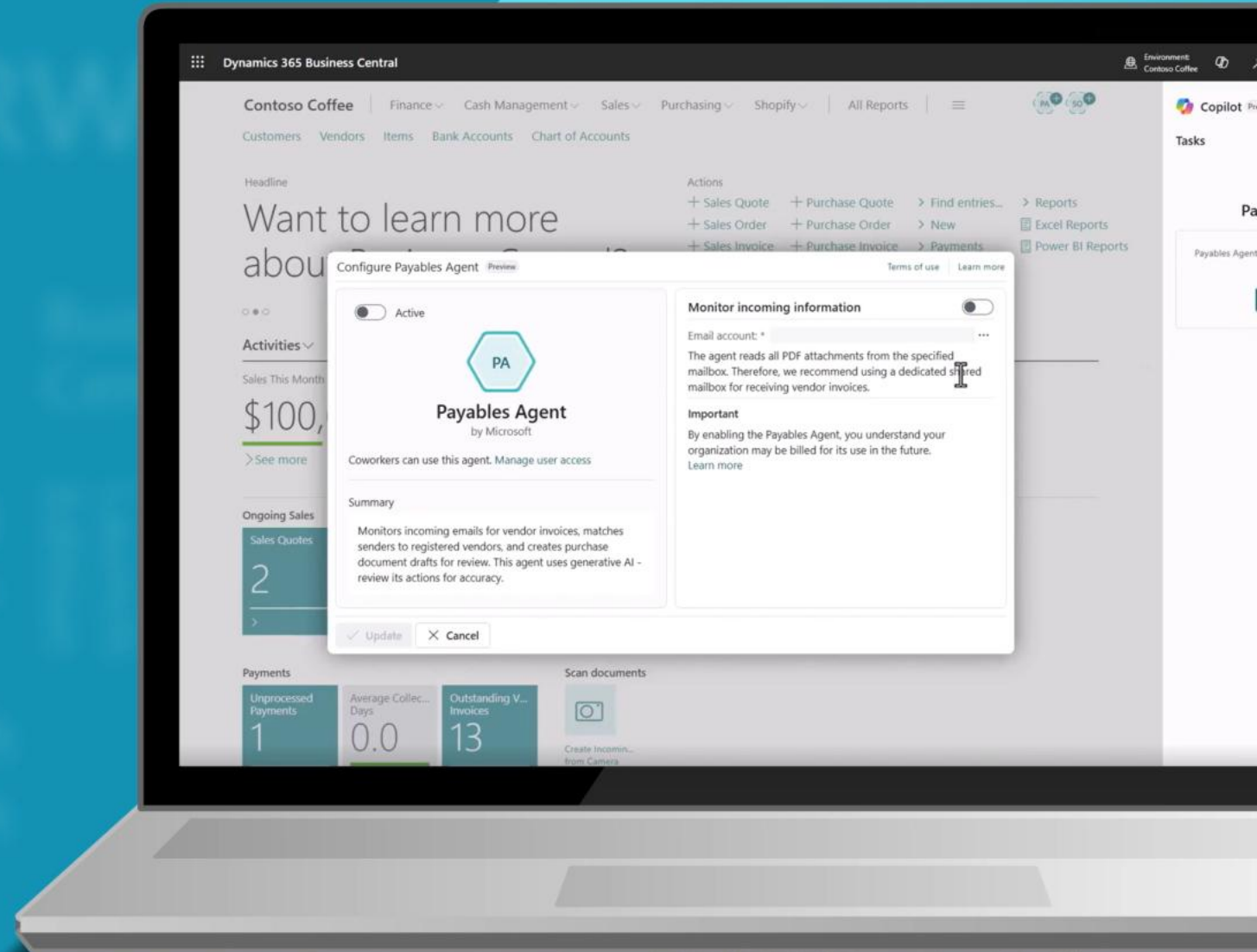
After review, converts the invoice draft to vendor invoice



The Purchase Invoice is ready for approval and posting

Transform vendor invoice processing with the Payables Agent

Business Central 2025 release wave 2



Use case scenario



Michelle
Accounts Payable Clerk

Michelle starts her day by opening Business Central. A stack of purchase invoices has arrived from vendors.

Traditional scenario

Michelle clicks through each invoice, typing vendor names, invoice numbers, amounts, and due dates into the system. Next, she cross-checks every detail against purchase orders and vendor agreements, sometimes flipping between multiple screens. Finally, after careful validation, she posts the invoice. It's repetitive, time-consuming, and leaves little room for strategic work.

Payables Agent solution

Instead of typing, the agent automatically reads invoice data from uploaded documents and matches it to purchase orders. It flags any discrepancies and suggests corrections. Michelle simply reviews, approves, and clicks "Post." The agent handles the rest—updating the ledger and ensuring compliance. What used to take hours now takes minutes, freeing Michelle to focus on vendor relationships and analysis.

Streamline your order processing

Sales Order Agent

Handling unstructured and varied sales inquiries on its own, so you spend less time on manual tasks and respond faster

Dynamics 365 Business Central

Environment: s41433_p41353_US_27-1

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

Get started

Hi, meet Business Central!

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

Show demo tours

Some features connect to other Microsoft services

Activities

Sales This Month	Overdue Sales Invoice Amount	Overdue Purch. Invoice Amount	Sales Invoices Predicted Overdue
\$0	\$70,024	\$97,200	0

Copilot Preview

Task #0002: Email from Alicia ...

Messages | Documents | Details

message from aliciat@CRMbc243725.OnMicro soft.com

Incoming. Requests to reorder last year's office furniture items with shipment by November 1, 2025, referencing attached invoice details.

Confirmed by A-AVERDNIK on Monday, October 27 at 11:38 AM

Task authorization was updated

Check item availability

Item Availability

The following requested items are not available: Conference Table, Stool, Lamp, 2-Drawer Filing cabinet. Additionally, the only available result for 'Standing Desk' is not a matching item. Please make such items available or stop the task and handle manually.

Confirmed by A-AVERDNIK on Monday, October 27 at 11:38 AM

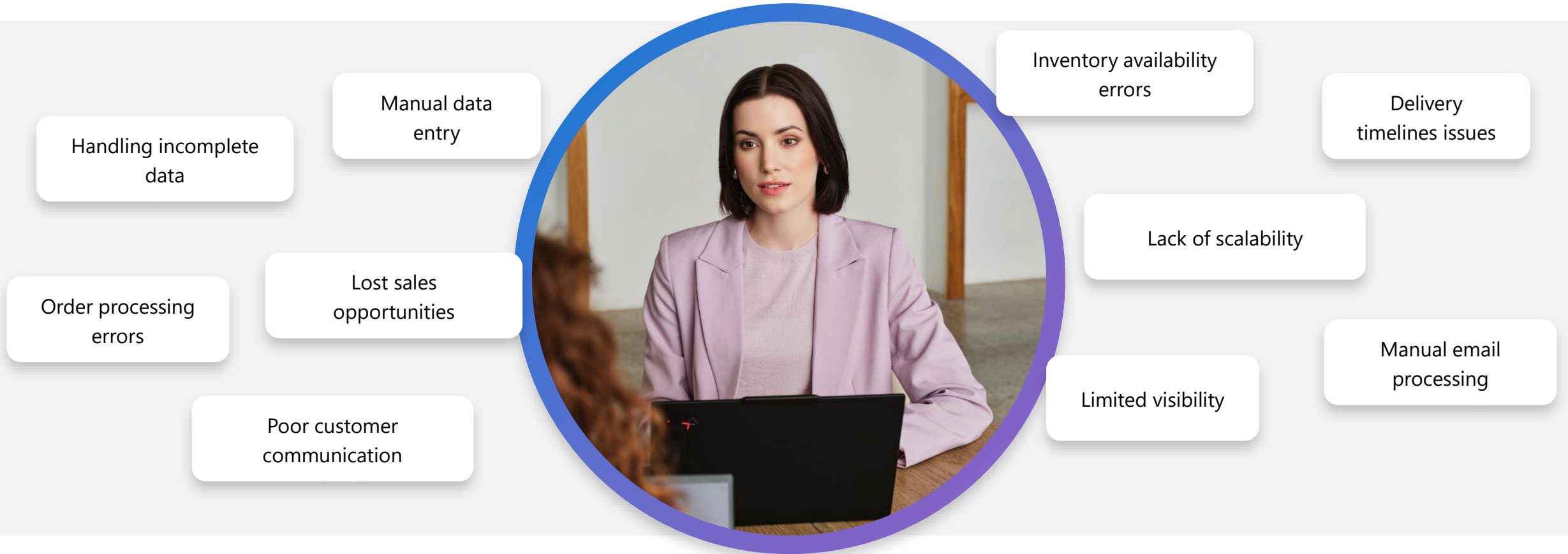
Show less

Now

Message to aliciat@CRMbc243725.OnMicro soft.com

Outgoing. Confirms availability of

Where sales order fulfillment gets stuck



The Sales Order Agent transforms sales order management



Automates high-volume sales inquiries

Manual handling of high-volume inquiries is time-consuming and prone to delays.



Improves accuracy and efficiency

Errors occur when processing incomplete or unstructured data manually.



Seamless natural language interaction

Traditional systems require rigid input formats, causing workflow interruptions.



Enhances customer responsiveness

Delays in confirming availability or alternative delivery dates frustrate customers.

The Sales Order Agent transforms sales order management



Automates high-volume sales inquiries

Sales Order Agent handles high-volume and varied sales requests autonomously, reducing manual effort and speeding up response times.



Improves accuracy and efficiency

Sales Order Agent processes unstructured or incomplete inputs with high precision and engages in multi-turn email conversations to clarify requests if important details are missing.



Seamless natural language interaction

The agent accepts natural language guidance, reducing workflow disruptions and enabling smooth, multi-turn conversations that lead to completed sales orders.



Enhances customer responsiveness

The agent automatically processes emails from customers and provides advanced item availability responses, including capable-to-promise options, alternative delivery dates and alternative product options.

Sales Order Agent

Uses AI to automate the full process of **capturing sales quotes and orders** from customers' requests expressed in **natural language**



Receives and analyzes customers' requests via e-mail



Detects and deflects irrelevant and malicious e-mail content



Checks available inventory, unit of measure, attributes, variants



Can be triggered automatically and on demand, once email is received



Engages in multi-turn e-mail conversations with the customer to clarify the request or discuss availability



Automatically resolves validation errors where possible



Creates and updates sales quotes with requested items, configured pricing and delivery dates



Acts within defined permissions and profile (role)



Composes emails with sales quote as attachment and share it in the same e-mail thread



Brings humans in the loop to validate key decisions



Converts sales quotes to a sales orders upon salesperson or customer confirmation

Use case scenario



Arnie

Sales order processor

A prospect sends an email requiring some goods and services, Arnie needs to register the quote and let the prospect know the availability and prices.

Traditional scenario

Arnie needs to open the email, manually find items and then manually create a quote for the customer. He spends a lot of time on lookup for items, filling in the quote details, and sending emails back and forth with the customer.

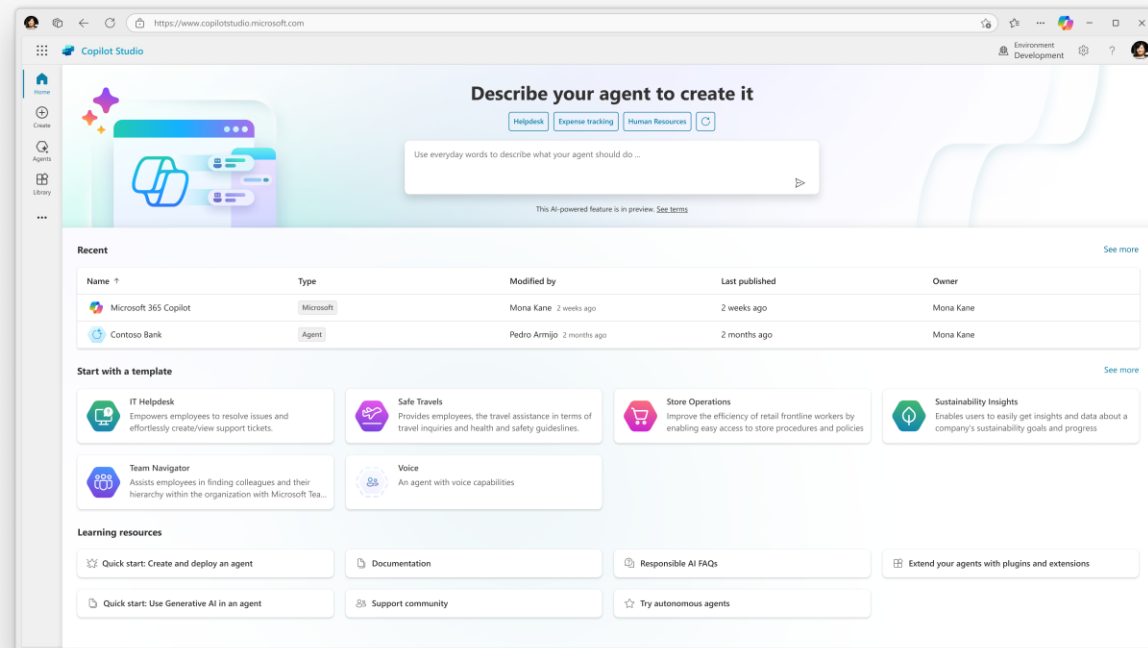
Sales Order Agent solution

The agent automatically processes the email, and searches in items list, categories, variants or item references. It creates a quote which Arnie can review. The agent engages in multi-turn conversations with the customer, is flexible to data format and capable to ask for missing information, uses synonyms and alternative search terms. In difficult scenarios, it brings Arnie in the loop. The Sales Order Agent saves Arnie time and makes his work more efficient.

Build agents with Copilot Studio



Copilot Studio is a platform to build conversational experiences that **connect to knowledge and data from Business Central** and can **operate standalone**



Meet your users where they already are



Access everything in one place



Automate your workflows



Integrate with your external apps



Connect to your data (Business Central, Microsoft 365,...)

Design powerful, connected agents

Handle complex queries with ease

Design intelligent conversations with greater control over the LLM such as robust variable and dialog management, logic, and responses.

Design personalized, responsive interactions

Engage employees or customers with rich, dynamic interactions that remember user content and context.

Customize your agent how you want

Build custom plugins, connectors, and prompts, and surface your business data where you need it.

Connect to your organization's knowledge bases

Use generative AI to dynamically respond using your organization's real-time content.

Create automated workflows

Use Power Automate to trigger automation across your business with UI, API, DPA, and RPA automation capabilities.

Escalate to human agents when needed

Continue the conversation with full context with an end-to-end customer engagement platform.

Create



New copilot

Create a copilot that leverages end-to-end generative AI for task completion, knowledge sharing, analytics, and more.

New Microsoft Copilot extension

Build a Copilot extension to customize what Microsoft Copilot can do in your organization.

Start with a template

This AI-powered feature is currently in preview. [See terms](#)



Organization Navigator

Assists employees in finding colleagues and their hierarchy within the organization using Microsoft Teams



Safe Travels

Provides answers to common travel questions and related health and safety guidelines



Store Operations

Improve the efficiency of retail frontline workers by enabling easy access to store procedures and policies



Sustainability Insights

Enables users to easily get insights and data about a company's sustainability goals and progress



Weather

Your go-to assistant for getting weather forecast



Website Q&A

Instantly answer user questions using the content of your web site or other knowledge.



Approval Manager

Streamline your approval process across multiple systems with summarized requests in a consolidated view

Coming soon



CV Match

Employees use the power of AI to analyze CV and get recommended CVs

Coming soon



Job Craft

Revolutionize your HR approach with AI-constructed job descriptions and refined interview questions

Coming soon



Kudos

Transform your company culture by crafting and promoting well-deserved positive peer-to-peer recognition

Coming soon



Status Tracker

Promote communication with less meetings by streamlining your team's status updates with automated surveys

Coming soon



Wellness Check

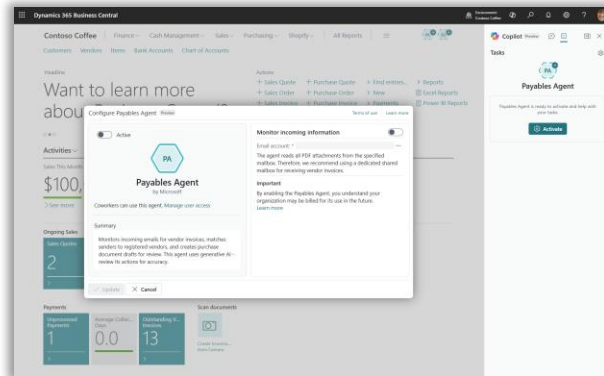
Conduct automated wellness checks to gauge employee morale and provide insights for a healthier workplace

Coming soon

See the agents in action



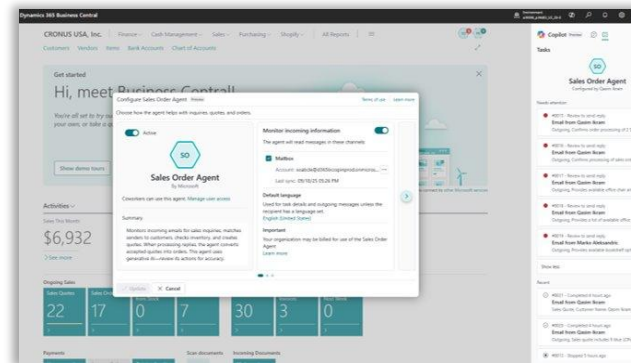
Payables Agent



aka.ms/PayablesAgentDemo



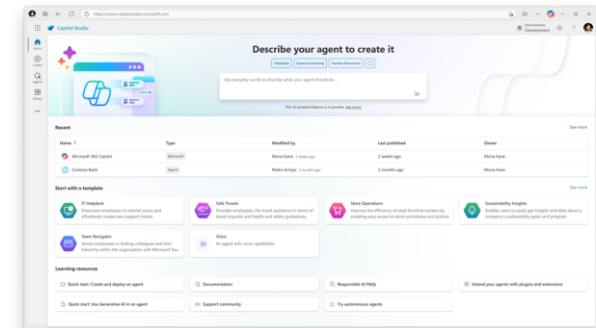
Sales Order Agent



aka.ms/SalesOrderAgentDemo



Copilot Studio



aka.ms/CopilotStudioDemo

Choose your demo

Get access to the Sales Order Agent

- Sales Order Agent consumes Copilot Credits

A typical Sales Order Agent process flow includes:

- One generative answer to analyze the incoming email (2 Copilot Credits)
- One agent action to check for items availability (5 Copilot Credits)
- One agent action to create or update a sales quote or order (5 Copilot Credits)
- One generative answer to generate the response email (2 Copilot Credits)

For example, assume that:

- 50% of emails include an attachment with usable sales data for making quotes, like a purchase order in PDF format. Each such email attachment triggers an agent action at cost of 5 Copilot Credits.
- Average usage is 100 requests per month.

The estimated monthly cost is calculated as: $[2 + 5 + 5 + 2 + (5 \times 0.5)] \times 100 = 1,650$ Copilot Credits/month

Get access to the Payables Agent

Payables Agent consumes Copilot Credits

Invoice level:

50 Copilot Credits
per invoice document

+

Invoice line level:

5 Copilot Credits
per invoice line

Example 1

1 invoice with 1 line:

55 Copilot Credits: $50 + (1 \times 5)$

Example 2

1 invoice with 10 lines:

100 Copilot Credits: $50 + (10 \times 5)$

Example 3

1 invoice with 50 lines:

300 Copilot Credits: $50 + (50 \times 5)$

Get started with agents

1

Get Agent resources and important links

aka.ms/BCAgents

2

Watch new Sales Order Agent and Payables Agent videos

aka.ms/BCAgentSizzle

3

How to get started with Agents (playlist)

aka.ms/BCStartAgent

4

Agent capabilities and sizzle reels (playlist)

aka.ms/BCAgentBuzz