Grow your business and supercharge operations with the power of AI

Microsoft Dynamics 365 Business Central

CoreBiz

Microsoft Dynamics 365

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

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

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

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

AI is challenging forward-looking leaders to embrace new ways of thinking about every workflow and resource in an organization
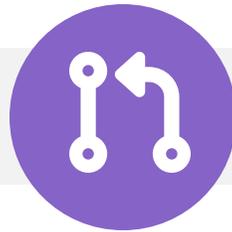
CoreBiz brings the expertise to support your AI journey

Unlock more value and opportunity for your business by working with a Microsoft partner.

Benefit from our Microsoft expertise

Our experts can help you navigate assessing your current state and identifying how AI can help you meet your goals.

We understand your pain points

Benefit from our deep experience with process transformation.

Allow us to be your transformation advisor

Our team can help you look end-to-end including adoption, governance, and security.

How can the right system unlock growth?

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

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

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

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

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

Boost productivity by natively integrating to the complete Microsoft ecosystem

Meet the future with Dynamics 365 Business Central

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

Adapt faster

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

Work smarter

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

Perform better

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

Business Central Supercharges SMBs with AI

A rock-solid ERP foundation
for small and medium businesses

Financial Management

Project Management

Sales Management

Manufacturing Management

Service Management

Supply chain Management

End-to-end business process management

Native Copilot

Enhanced and extended
with more than 7,000 solutions on AppSource

Mapped to your processes
through your relationship with CoreBiz

Automated
with the power of prebuilt and custom agents

Integrated natively
through the entire Microsoft ecosystem

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

- Works seamlessly with the Microsoft applications you already use and know – Outlook, Teams, Excel and Power Platform

- AI infused throughout the solution brings you continuous insights to speed decision making

- A single system that works across international locations

- Scalable and extensible to grow and adapt with your growing business

Microsoft Dynamics 365 Business Central

Microsoft 365

Developer Tools

Power Platform

Microsoft Azure

Identity, security, management, and compliance

Realize end-to-end business management with Business Central

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

Increase financial visibility and performance

Take control of your financial data

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

Use Copilot in Business Central, built-in reports, Excel, or Microsoft Power BI and unlimited data dimensions to analyze trends and improve business planning
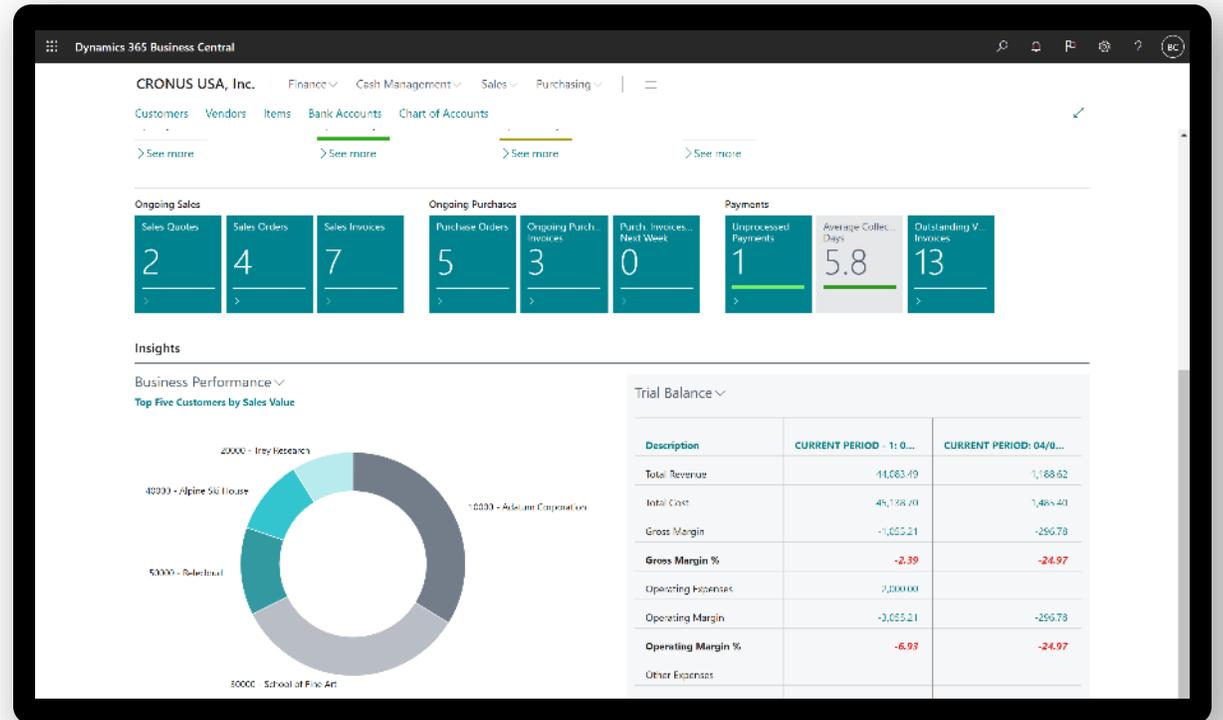
Boost sales and improve customer service
Build long-lasting relationships

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

Drive sales with marketing text suggestions from Copilot, transition smoothly from sales to service, and manage service agreements to exceed customer expectations
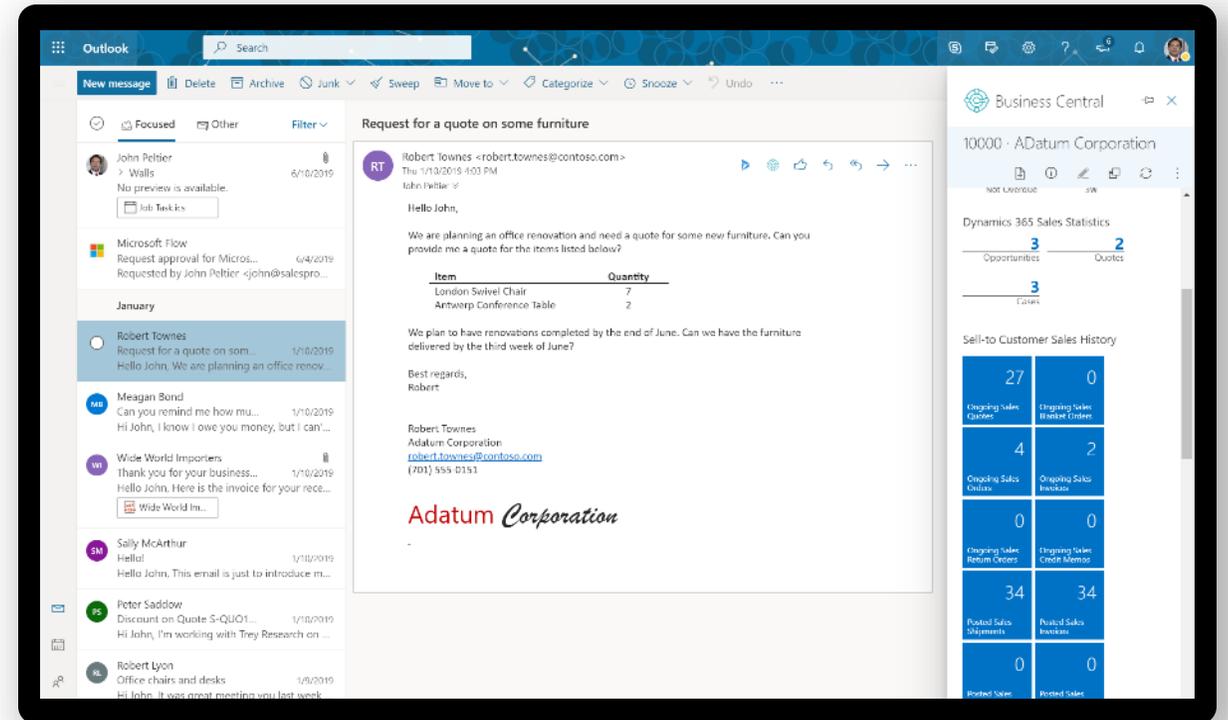
Finish projects on time and under budget
Successful projects start with proper planning

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

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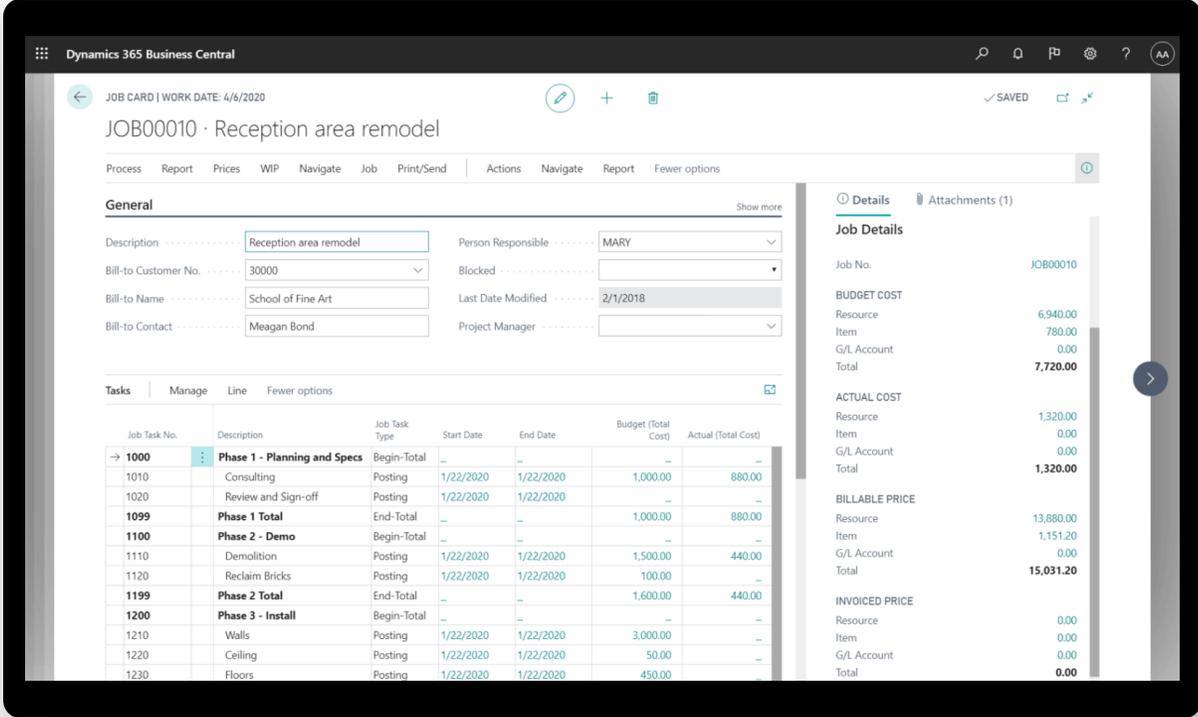
Optimize inventory and supply chain management

End-to-end visibility for better results

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

Move from manual forecasting and inventory management to AI-based predictive forecasting to improve accuracy
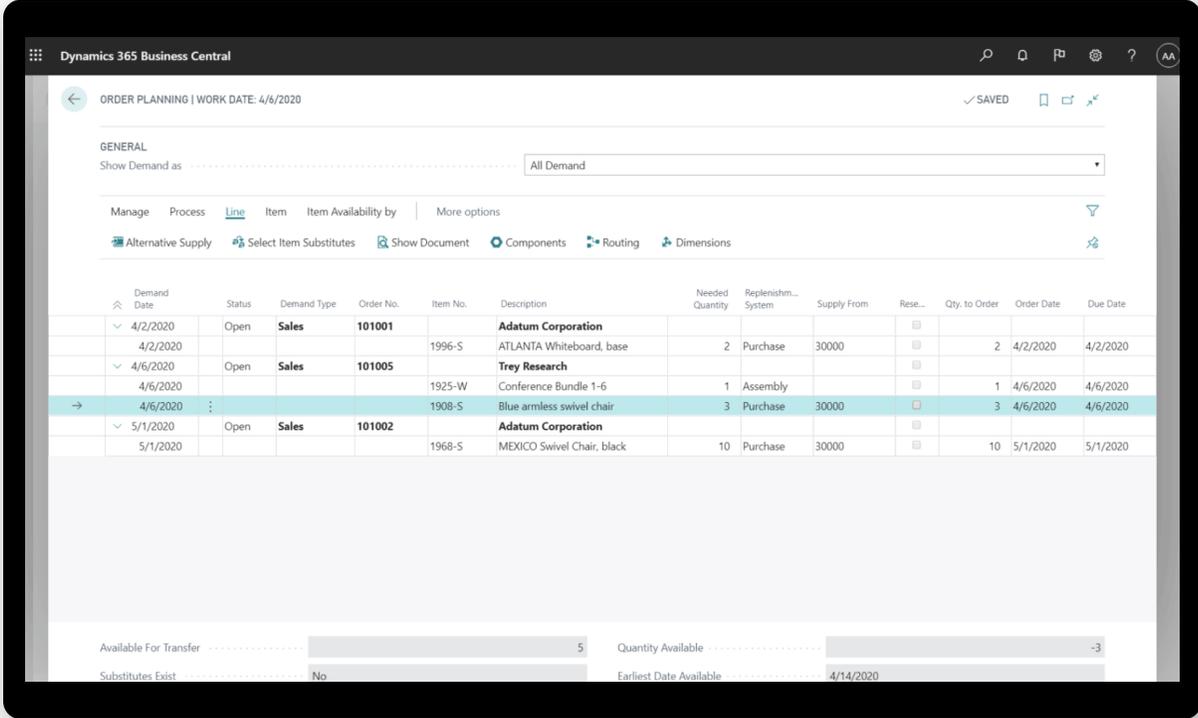
Tailor-made for SMBs, with the full power of Microsoft AI

| Decades of research & development | Committed to advancing Responsible AI | Secure from the start | Reliability & performance at scale for large AI models |

Runs on trust

Your data is your data

The power of AI in Business Central
Copilot and the agentic ecosystem

Agents
(consumption-based pricing)

Sales Order agent

Payables agent

More prebuilt agents coming soon

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

Copilot in Business Central
(included)

Analysis assist

Chat with Copilot

Summarize

Marketing & Sales Suggestion

Bank account reconciliation

Copilot Extended

Microsoft 365 Copilot

Copilot Studio

Power Automate

Azure AI Foundry

Power Apps

...and more

Copilot in Business Central

What can Copilot do for you?

Guide

Explains concepts and helps you learn new skills

Find

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

Compare

Reconciles bank statements and incoming e-documents

Analyze

Organizes data to help you get to insights faster

Suggest

Drafts product descriptions, suggests numbering pattern setup for records

Your AI-powered assistant with a growing skillset

Copilot in Business Central
Get to key insights faster

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

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

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

Prepares the analysis tab

Adjust and iterate on your layout

Chat with Copilot

Use natural language to interact with Copilot

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

Finds business data for your company in Business Central

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

Helps you understand the purpose and typical use of individual fields

Finds records or pages, or explains how to do things

Ask follow-up or clarifying questions

Express yourself in your own words

Bank reconciliation with Copilot
Solve the puzzle of bank reconciliation faster and easier

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

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

Suggests matching ledger accounts to post new transactions to.

Finds matches

Bank Account Name	Statement No. ↑	Statement Date	Balance Last Statement	Statement Ending
World Wide Bank	1	3/31/2024	8,345.00	26,
World Wide Bank	2	4/30/2024	26,069.35	37,

Reconcile with Copilot

Terms of use | Learn more

Perform reconciliation for this bank account .... CHECKING ....

Use transaction data from .... Import transaction data...

Generate | 📎 Attach

You upload or import bank data

Take automation further with Agents

Built for Business Central, extendable across business processes

Sales Order Taker — In preview

Communicates with customers

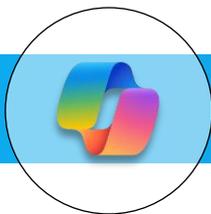Interprets customer request

Sends quotes

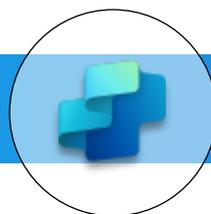### Payables Agent — In preview

Receives vendor invoices

Captures invoice information

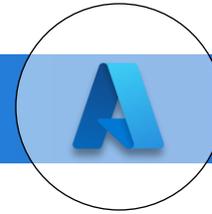Registers invoices according to company policy, preference, and history

No code ‹‹‹‹‹‹‹‹‹‹ ›››››››››› Pro code

Agent builder

Copilot Studio

Azure AI

Copilot beyond Business Central

Seamless systems of record, one source of truth

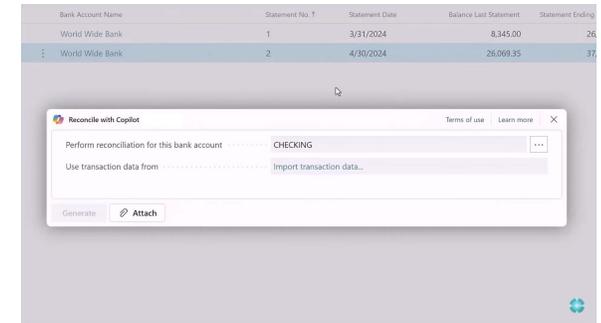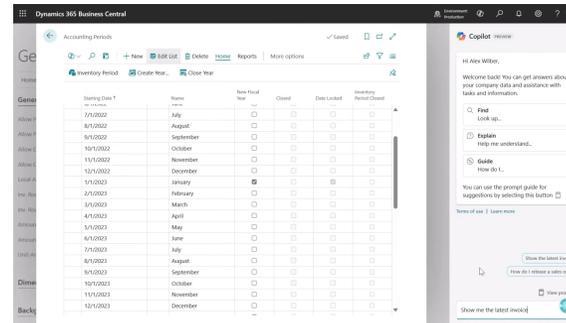Generate a new customer profile from an inbound email

Draft a purchase order and check inventory from a call transcript

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

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

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

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

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

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

Microsoft Copilot   **Business Central**

Teams   **Outlook**   **Excel**

Microsoft 365
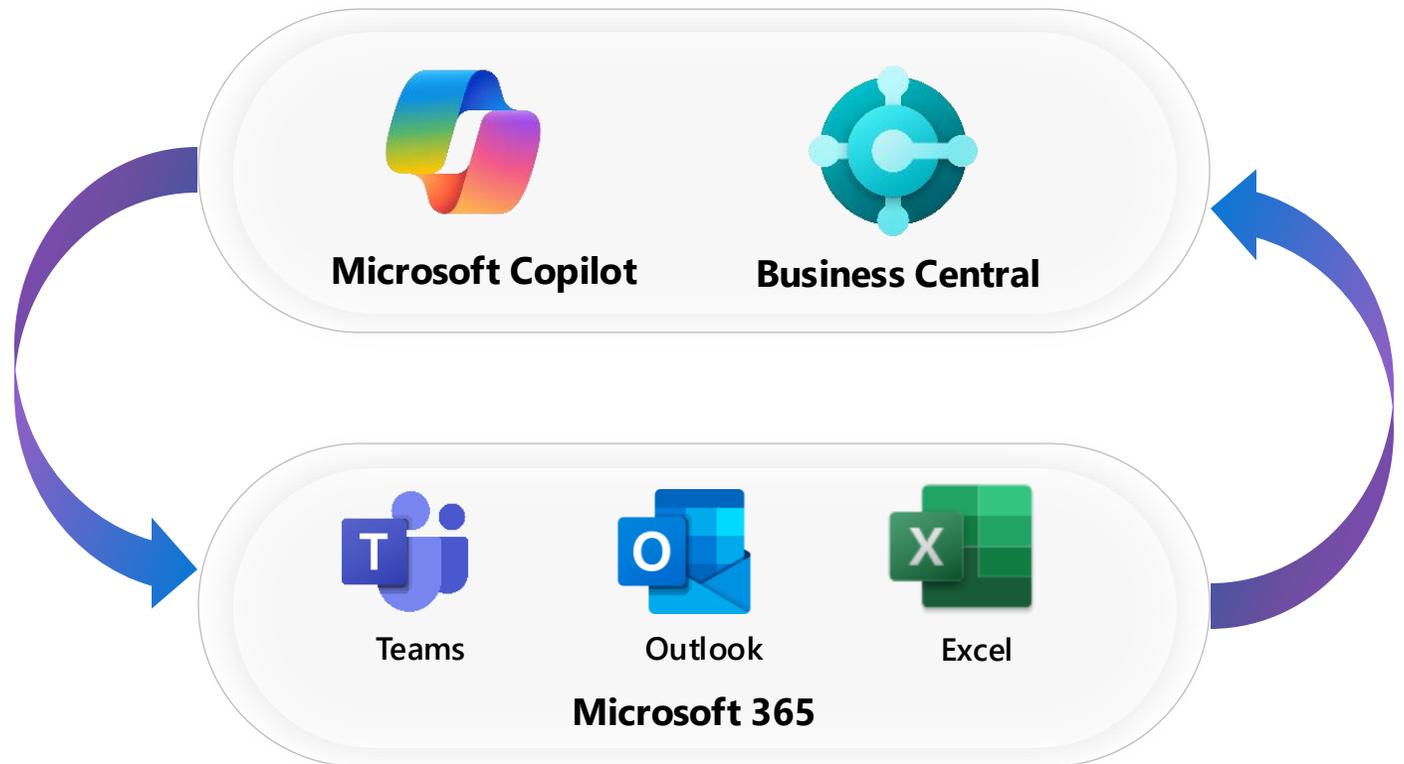
Dynamics 365 Business Central with Outlook

Go from quote to cash within the flow of work

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

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

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

Dynamics 365 Business Central with Excel

Simplify daily tasks to free more time for strategy

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

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

Easily analyze transactions using familiar Excel functionality, then share with the team for review and co-authoring
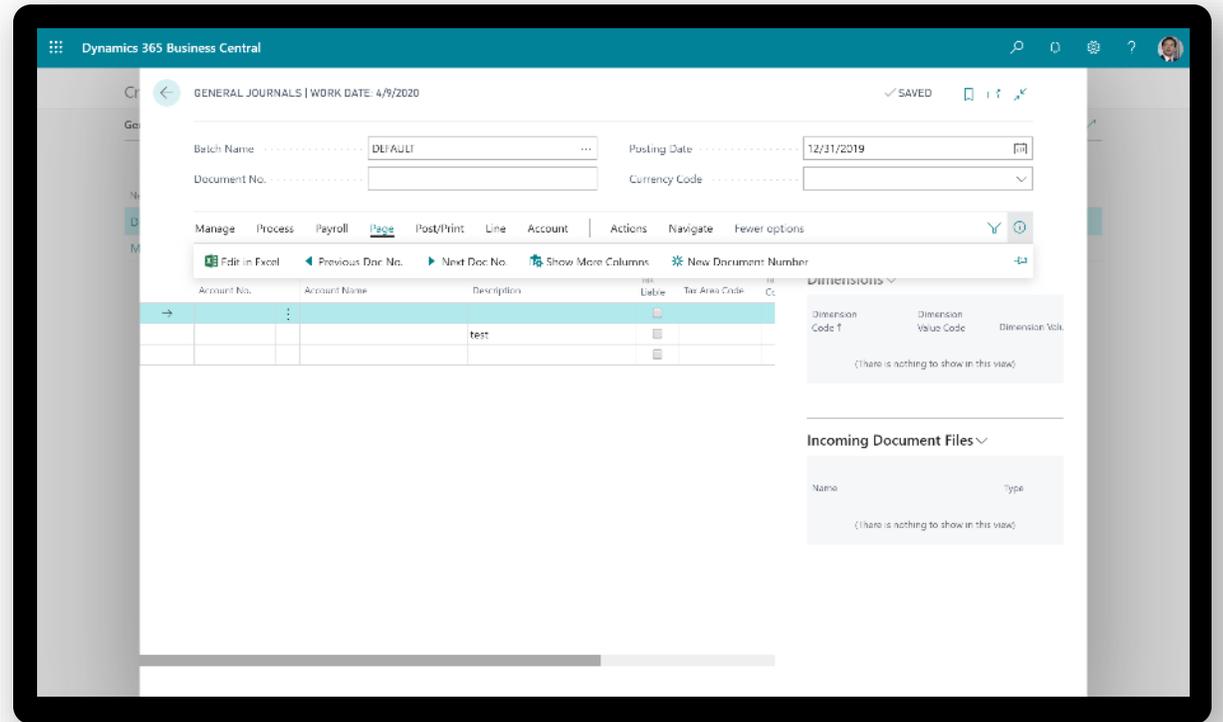
Dynamics 365 Business Central with Teams
Quickly share details so you can act faster

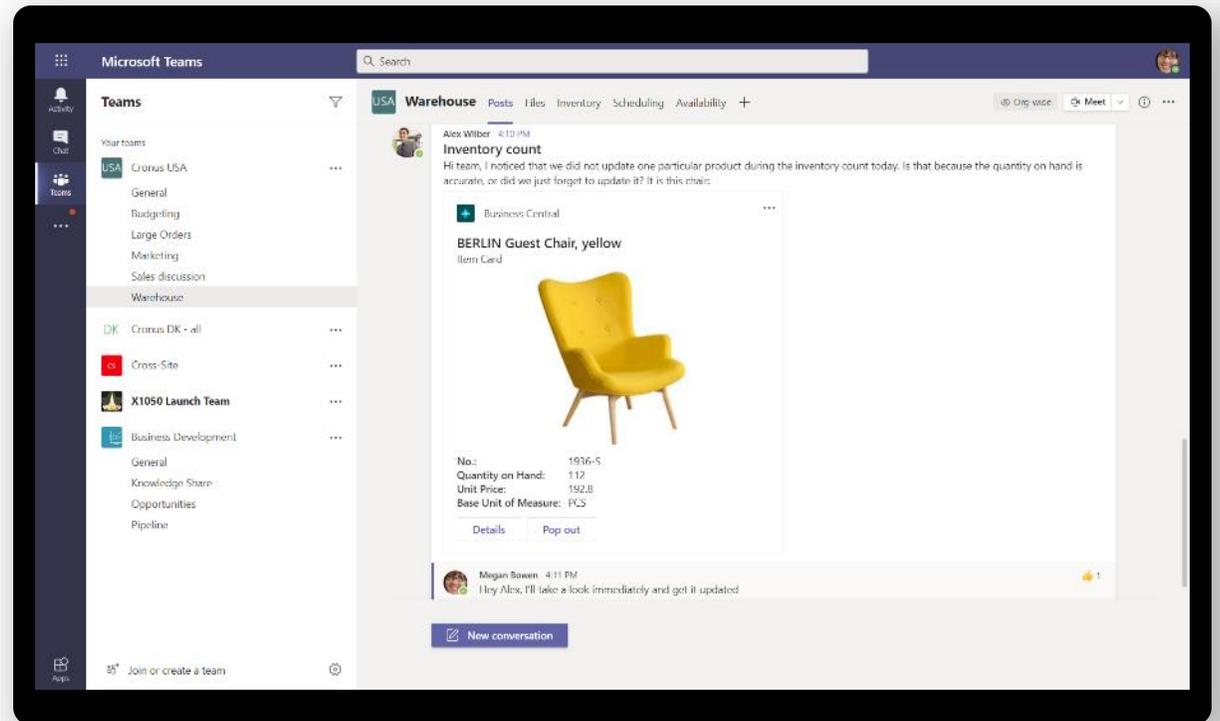Make faster decisions by sharing Business Central data within Microsoft Teams chat or channel

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

Easily edit data and take action without switching apps

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

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

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

Read-only access is granted through your Microsoft 365 license as configured by your admin
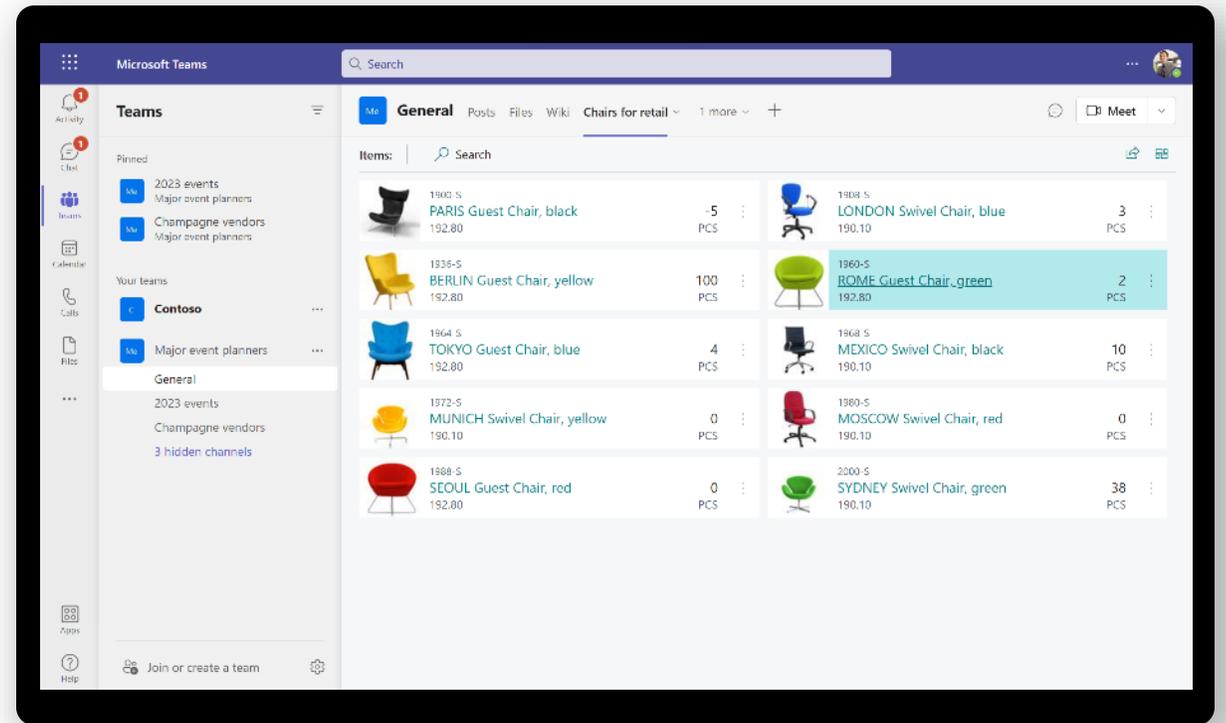
*Applies to Microsoft 365 licenses that include Microsoft Teams

Dynamics 365 Business Central checks all the boxes...
... with benefits ONLY Microsoft can provide

- ☑ **Cloud-based** with remote access across mobile devices

- ☑ **Deep functionality** with built-in best practices that improve processes across the business

- ☑ **Open architecture** easily connects with existing systems

- ☑ **Highly customizable** to meet industry or vertical needs with pre-built apps

- ☑ **Robust, flexible reporting and analysis** to drive business performance and improve decision-making

- ☑ **Rapid to deploy and easy to use** so you can realize business value quickly

- ☑ **Microsoft 365 applications** work natively with Business Central, boosting productivity and improving collaboration

- ☑ **Microsoft Copilot and Agents** lead in AI innovation so your business can adapt faster, work smarter, and perform better

- ☑ **Microsoft delivers world-class security, performance and scale** to support your business now and as it grows

Let's get started

- Explore with a [trial](#) and [self-guided tour](#)

- Schedule an in-depth discovery session

- [Book a Free Consultation with CoreBiz](#)

CoreBiz

Thank you

Microsoft