



What's new in BC?

BC 26.0 - 2025 Wave 1 including 2024 Wave 2

So what is new in BC?


- User Features
- Projects (aka Jobs)
- Multiple VAT no. for Customers
- Sustainability
- Reports
- Copilot
- Additional stuff we can't fit in





User features

- Drag and drop multiple files
- PDF Preview
- Check Doc. Total Amount
- Default Qty of 1 on document G/L Account lines
- Factbox and Column resize
- New faster Search

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 Customer Card



60000 · Coffee 4 All

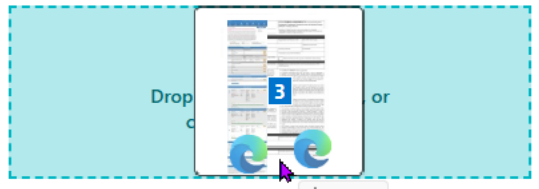
HomeRequest ApprovalNew DocumentPrices & DiscountsCustomerReportMore options

ContactApply TemplateMerge With...Send Email

General

No.	60000	...	Responsibility Centre		▼
Name	Coffee 4 All		Service Zone Code		▼
IC Partner Code		▼	Document Sending Profile	E-DOCUMENTS	▼
Balance (LCY)		0.00	Total Sales - Fiscal Year		0.00
Balance (LCY) As Vendor		0.00			0.00
Balance Due (LCY)		0.00			0.00
Credit Limit (LCY)		2,500.00			0.0
Blocked		▼			
Privacy Blocked		<input type="checkbox"/>			
Salesperson Code	JO	▼			

Select files



+ Copy

Cancel

Address & Contact

Address		Mobile Phone No.	
Address		Email	
Address 2		Fax No.	
Country/Region Code	GB	Home Page	
City		Language Code	
County		Format Region	
Postcode	WC2E 7HQ	Contact	
Show on Map		Contact Code	
Phone No.		Contact Name	

 Summary Preview

Summarisation was stopped.

...

DetailsAttachments (0)

Documents (0) ▼

Name

Fill

(There is nothing to show in this view)

Links +

(There is nothing to show in this view)

Notes +

(There is nothing to show in this view)

View the file. You will be able to download the file from the viewer control. Works only on limited number of file types.								
Attachment			File Extension	File Type	User	Attached Date	Flow to Sales Trx	Flow to Service Trx
→	Credit report	:	pdf	PDF	ALEXW	24/04/2025 16:18	<input type="checkbox"/>	<input type="checkbox"/>
	Customer Agreement		pdf	PDF	ALEXW	24/04/2025 16:18	<input type="checkbox"/>	<input type="checkbox"/>
	Customer Data Confidentiality Agrrement		pdf	PDF	ALEXW	24/04/2025 16:18	<input type="checkbox"/>	<input type="checkbox"/>

Close

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Projects (aka Jobs)

- Multiple Bill-to Customers
- Creating warehouse pick
- Location Code on Project Planning Lines
- Sales Invoices – Get Planning Lines
- Integrates with Field Service

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- **Integrates with Field Service**

Multiple VAT no.'s for customers

- Alternative VAT Reg. No. per ship to country
- Customer
- Documents
- Updates to VAT Entries
- VAT Returns can be filtered by country

Sustainability

- **Default Sustainability Account**
- **Sustainability within General Journals**
- **Scope 3 Value Chain tracking**

Sustainability

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Reporting

- Word enhancements
- New Excel Reports
- Ad-hoc Analysis

Reporting

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- New Excel Reports
- Ad-hoc Analysis

Insert Layout Comment

Hide If Empty

Layout Co

Hide Empty Table

Hide Empty Table Row

Hide Empty Table Column

Hide Field If Zero



Document Title Lbl

Document No

CustomerAddress1
CustomerAddress2
CustomerAddress3
CustomerAddress4
CustomerAddress5
CustomerAddress6
CustomerAddress7
CustomerAddress8

DocumentDate Lbl

DocumentDate

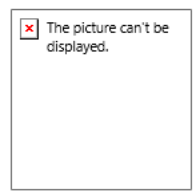
DueDate Lbl

DueDate

PaymentTermsDescription Lbl

PaymentTermsDescription

ItemNo_Lin e_Lbl	Description_Line_Lbl	Quantity_L ine_Lbl	Unit_L bl	UnitPrice_ Lbl	VATPct_L ine_Lbl	LineAmount_Li ne_Lbl
ItemNo_Lin e	Description_Line	Quantity_L ine	UnitOf Measu re	UnitPrice	LineDi scount Perce ntText _Line	VATPct_ LineAmount_Li ne
						AmountForma
						Description_ReportTotalsLine tted_ReportTo talsLine
						TotalText
						TotalAmountInclud ingVAT



CompanyAddress1

CompanyAddress2
CompanyAddress3
CompanyAddress4
CompanyAddress5
CompanyAddress6
CompanyHomePage
CompanyEMail
CompanyPhoneNo

XML Mapping

Custom XML Part:

urn:microsoft-dynamics-nav/reports/Standard_Sales_Invoice/1306/

NavWordReportXmlPart

BCReportInformation

ReportMetadata

ExtensionId

ExtensionName

ExtensionPublisher

ExtensionVersion

ReportId

ReportName

AboutThisReportTitle

AboutThisReportText

ReportHelpLink

ReportRequest

TenantEntrald

EnvironmentName

EnvironmentType

CompanyName

CompanyDisplayName

CompanyId

UserName

DateAndTime

Language

FormatRegion

> DateTimeValues

> Header

Reporting

- Word enhancements
- **New Excel Reports**
- Ad-hoc Analysis

New Excel Reports

Finance

- Trial Balance
- Trial Balance by period
- Trial Balance/budget
- Trial Balance/previous year
- Consolidated Trial Balance
- Aged Accounts Receivable
- Aged Accounts Payable

New Excel Reports

Sales and Purchasing

- Customer – Top 10 list
- Aged Accounts Receivable
- Vendor – Top 10 list
- Aged Accounts Payable

New Excel Reports

Fixed Assets

- Fixed Asset Detail
- Fixed Asset Analysis
- Fixed Asset Projected Value

New Excel Reports Sustainability

- Total Emissions
- Emissions by Category
- Emissions per Facility

Excel Reports now Obsolete

- Balance Sheet
- Income Statement
- Statement of Cash Flow
- Statement of Retained Earnings
- Customer Statements
- Aged Accounts Receivable
- Aged Accounts Payable

Reporting

- Word enhancements
- New Excel Reports
- **Ad-hoc Analysis**

Ad hoc Analysis

- Service Ad Hoc Analysis
 - Project Ad Hoc Analysis
 - Fixed Ad Hoc Analysis
-
- 26.1 Sales Order Performance
 - 26.1 Purchase Order Performance

Cronus UD Ltd. | Finance | Cash Management

Customers Vendors Items Bank Accounts

Headline

Connect to banks
bank feeds.

Get started: Here are a few things you can try

Activities

Sales This Month

£4,723

> See more

Overdue Sales Invoice Amount

£44,005

> See more

Overdue Purch. Invoice Amount

£341,196

> See more

Sales Invoices Predicted Overdue

0

> See more

Ongoing Sales

Sales Quotes

2

>

Sales Orders

11

>

Completely Re...
from Stock

0

>

Sales Invoices

7

>

Ongoing Purchases

Purchase Orders

15

>

Ongoing Purch...
Invoices

4

>

Purch. Invoices...
Next Week

0

>

Payments

Unprocessed
Payments

1

>

Average Collec...
Days

0.0

>

Outstanding V...
Invoices

18

>

Scan documents



Incoming Documents

My Incoming Documents
1

Tell me what you want to do

ad-hoc

Go to Reports and Analysis

Service Ad-hoc Analysis

Reports and Analysis

Project Ad-hoc Analysis

Reports and Analysis

Fixed Assets Ad-hoc Analysis

Reports and Analysis

Search for 'ad-hoc'

Search company data

Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

Find entries...

> Reports

New

Excel Reports

Payments

Power BI Reports

Show demo tours

Reporting

- Word enhancements
- New Excel Reports
- Ad-hoc Analysis

Standard Power BI

- Finance
- Sales
- Purchasing
- Inventory
- Projects
- Manufacturing

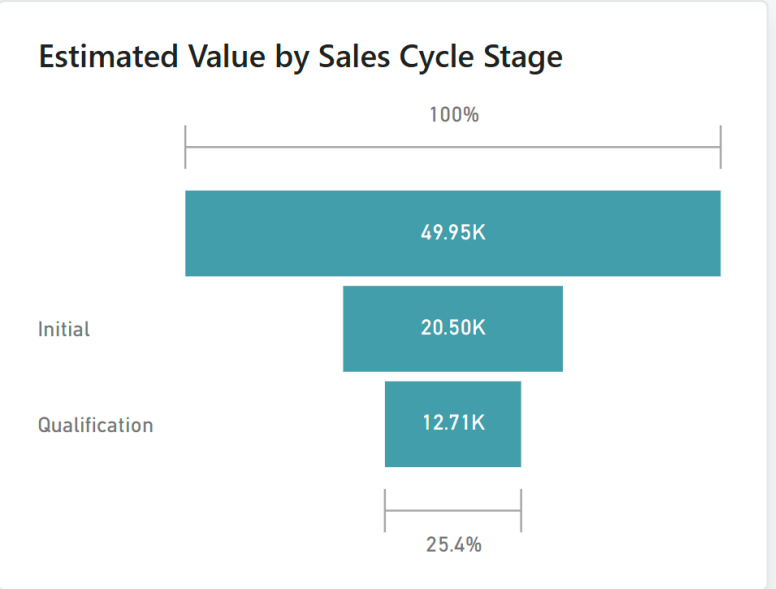
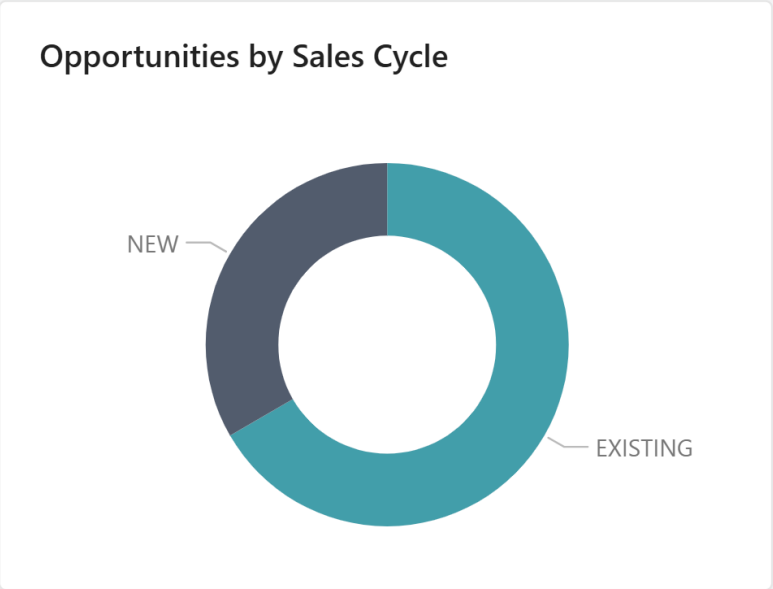
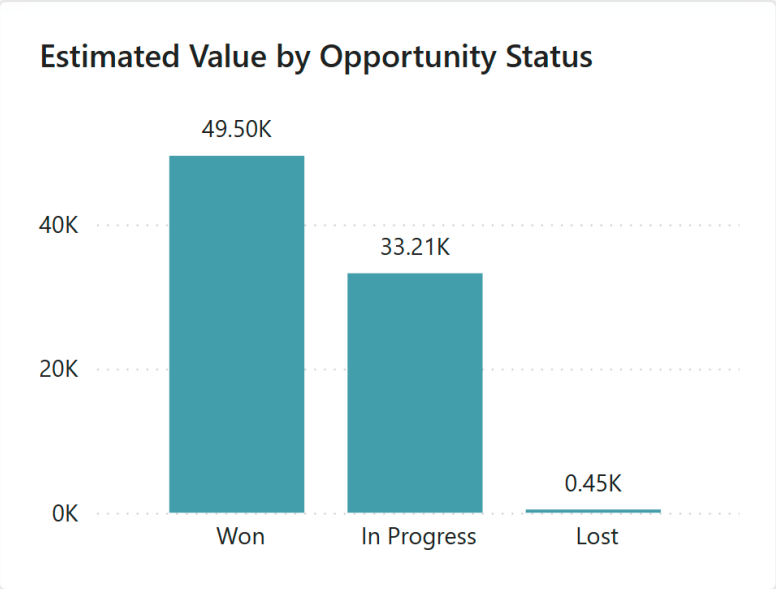
Opportunity Overview

No. of Opportunities
15

Estimated Value
83.16K

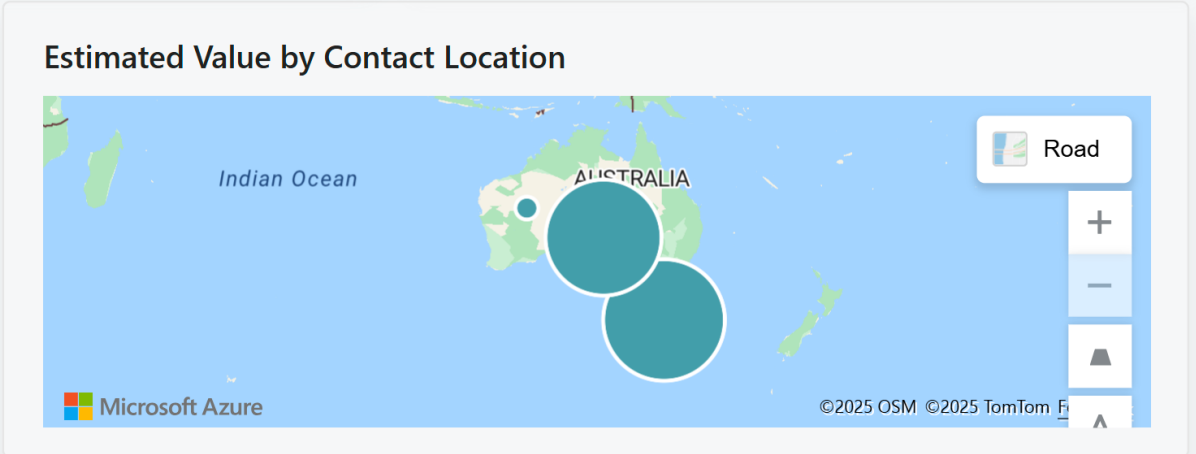
Calculated Current Value
52.45K

Opportunity Sales Quote Amount
12.71K



Opportunities by Salesperson

Salesperson Name	No. of Opportunities	Estimated Value	Calculated Current Value	Average Char
Benjamin Chiu	4	18,212.00	2,652.40	
OP000001	1	12,712.00	2,542.40	
OP100022	1	5,000.00	100.00	
Total	15	83,162.00	52,452.40	



Sales Quote Overview

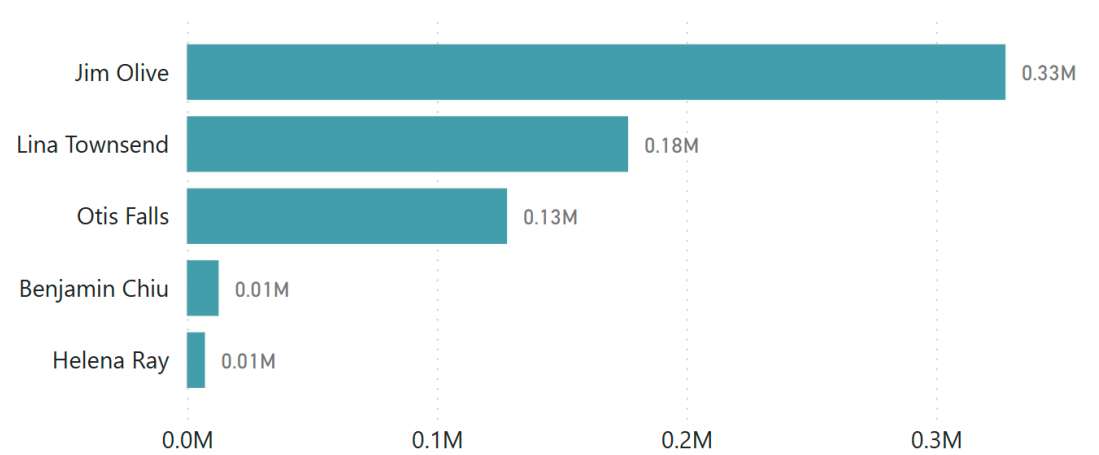
Company Name: YELLOWSTONE - Last Refreshed: 14/03/2025 02:03 PM

No. of Sales Quotes	Sales Amount	Gross Profit	Gross Profit Margin
41	652.74K	167.88K	25.72%

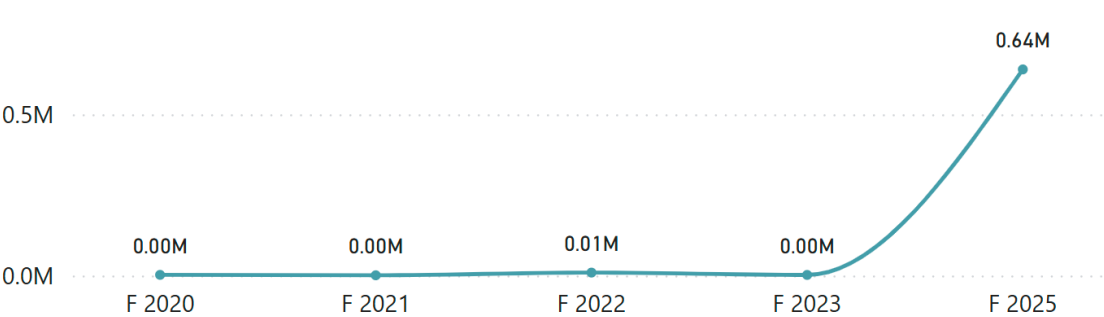
Sales Quotes by Customer

Customer Name	Sales Amount	Sales Quantity	Gross Profit	Gross Profit Margin
+ Adatum Corporation	<u>326,056.00</u>	231.00	71,701.00	21.99%
+ Alpine Ski House	<u>68,162.00</u>	142.00	27,214.00	39.93%
+ Relecloud	<u>74,576.00</u>	159.00	18,160.00	24.35%
+ School of Fine Art	<u>70,845.00</u>	101.00	25,901.00	36.56%
+ Trey Research	<u>113,105.00</u>	157.00	24,899.00	22.01%
Total	<u>652,744.00</u>	790.00	167,875.00	25.72%

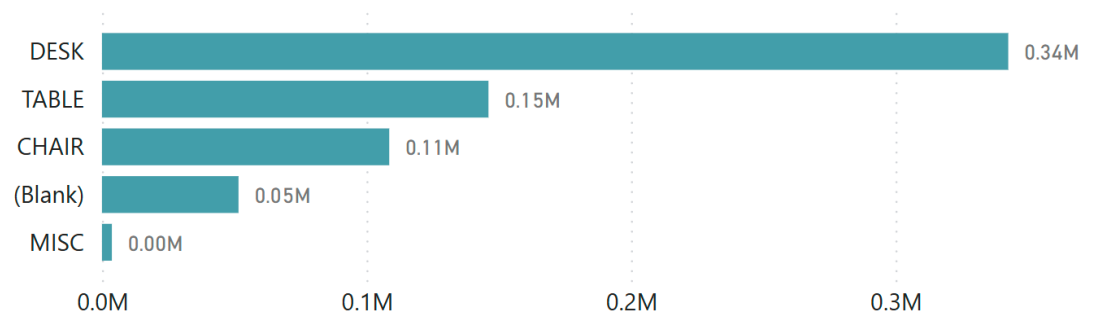
Sales Quote Amount by Salesperson



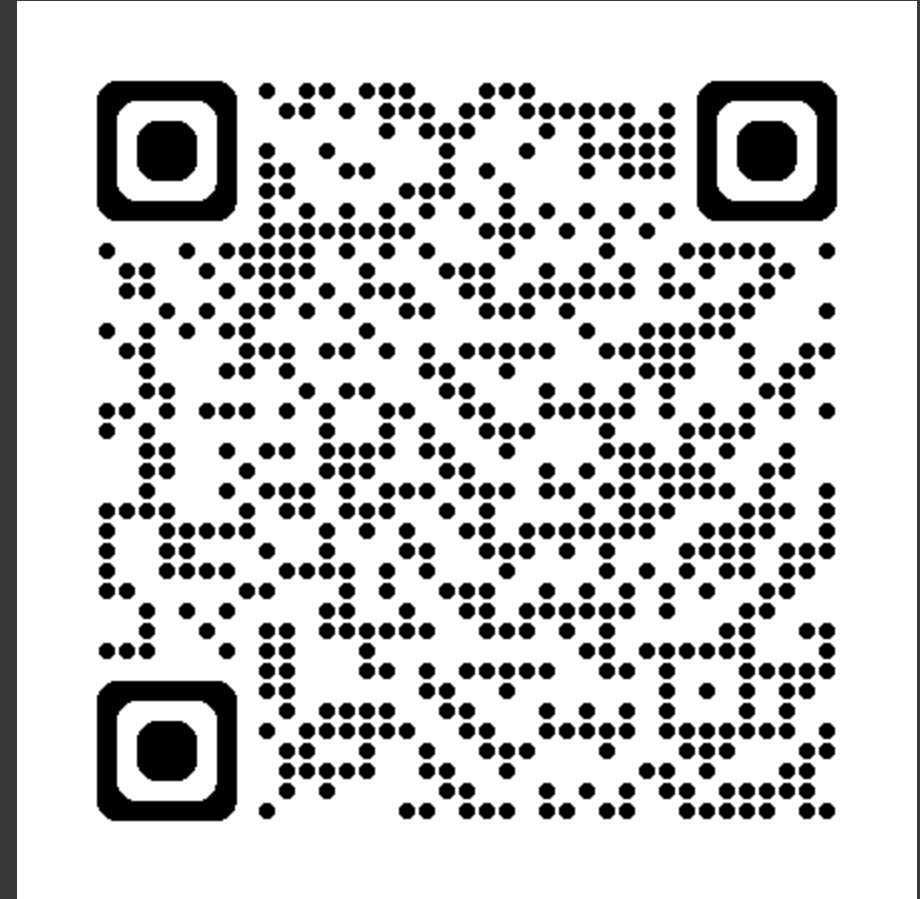
Sales Quote Amount Over Time



Sales Quote Amount by Item Category Code



All you need
to know
about BC
reporting



aka.ms/bcreporting

Copilot

- Sales Order Agent
- Payables Agent
- Autofill
- Summarise
- Chat with Copilot

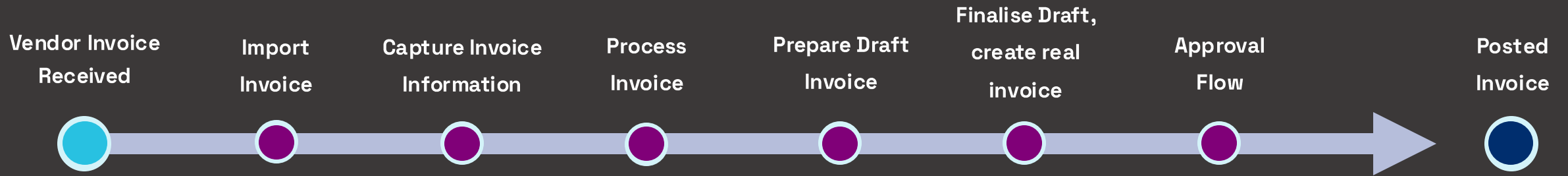
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Copilot

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Payables Agent



Payables Agent

- Public preview later this year
- Processes invoice in E-Documents
- Supports PDF Invoices
- Intelligent accounting according to history, policy & other predictors
- Configurable 'human-in-the-loop'
- More improvements to come...

Copilot

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Customer Card



✓ Saved



C00020 · ABC Company

Home

Request Approval

New Document

Prices & Discounts

Customer

Report

More options



Contact



Apply Template



Merge With...



Send Email



Address

Address

Address 2

Country/Region Code ..



City

County

Postcode

[Show on Map](#)

Phone No.

Mobile Phone No.

Email

Home Page

Contact

Contact Name





Customer Card



Keep all (8)



C00020 · ABC Company

Home

Request Approval

New Document

Prices & Discounts

Customer

Report

More options



Copilot suggestion [Preview](#)

Frequent choice: This is the most frequently used value for this type of field in your company.

AI-generated content may be incorrect



✓ Keep

Change



Add

Add

Add

Country/Region Code



GB

City



Cambridge

Post Code



CB1 2FB

[Show on Map](#)

Invoicing

3 suggestions

AI-generated content may be incorrect



[Show more](#)

VAT Registration No.

...

Posting Details

Phone No.

Mobile Phone No.

Email

Home Page

Contact

Contact Name

...





Customer Card



Keep all (8)



C00020 · ABC Company

[Home](#)

[Request Approval](#)

[New Document](#)

[Prices & Discounts](#)

[Customer](#)

[Contact](#)

[Apply Template](#)

[Merge With...](#)

[Send Email](#)

City

Post Code

[Show on Map](#)

Invoicing

3 suggestions

AI-generated content may be incorrect



VAT Registration No.

EORI Number

Use GLN in Electronic D... ☐

Copy Sell-to Addr. to Q...

Posting Details

Gen. Bus. Posting Group

Customer Posting Group

Prices and Discounts

Customer Price Group

Copilot suggestions

Preview

☒ Blocked: *Ship* ⓘ

☒ Payment Terms Code: *1M(8D)* ⓘ

☒ Gen. Bus. Posting Group: *D...* ⓘ

☒ Customer Posting Group: *D...* ⓘ

☒ Customer Disc. Group: *RETAIL* ⓘ

☒ Country/Region Code: *GB* ⓘ

☒ City: *Cambridge* ⓘ

☒ Post Code: *CB1 2FB* ⓘ

AI-generated content may be incorrect



☒ Keep selected



Discard all

Copilot

- Sales Order Agent
- Payables Agent
- Autofill
- **Summarise**
- Chat with Copilot

Copilot

- Sales Order Agent
- Payables Agent
- Autofill
- Summarise
- Chat with Copilot

←

Sales Order

+

✓ Saved

101011 · Relecloud

Home

Prepare

Print/Send

Request Approval

Order

More options

Post...

Release

Create Warehouse Shipment

Create Inventory Put-away/Pick...

Archive Document

General

Show more

Customer Name	Relecloud	Order Date	04/06/2025
Contact	Jesse Homer	Due Date	18/06/2025
Document Date	04/06/2025	Requested Delivery D...	
Posting Date	04/06/2025	External Document No.	
VAT Date	04/06/2025	Status	Open

Lines

Manage

Line

Order

Show Lines with Issues

New Line

Delete Line

Select items...

Type	No.	Description	Location Code	Quantity	VAT Bus. Posting Group
→ Item	1900-S	PARIS Guest Chair, black		4	EXPORT

Subtotal Excl. VAT (G...	500.40	Total Excl. VAT (GBP)	500.40
Inv. Discount Amount...	0.00	Total VAT (GBP)	0.00
Invoice Discount %	0	Total Incl. VAT (GBP)	500.40

Summary

Preview

1 minute ago

- The balance on the customer's account totals **6,491.88 LCY**, with overdue amounts also at **6,491.88 LCY**, indicating outstanding payments.
- Outstanding invoices amount to **5,470.68 LCY**, alongside sales for this order of **500.40 LCY**, reflecting revenue generation.
- The adjusted profit for this order is **110.40 LCY**, with an original profit percentage of **22.1%**, indicating profitability.

Show more

AI-generated content may be incorrect

Details

Attachments (0)

Document Check

0

Issues Total

Refresh

Issues

No issues found.

Copilot

Preview

Please answer...

You can use the prompt guide for suggestions by selecting this button

Terms of use | Learn more

Summarise Sales Order 101011 · Relecloud

Here's the summary:

- The outstanding balance on this account is **6,491.88 LCY**, with overdue amounts totaling **6,491.88 LCY**.
- There are **5,470.68 LCY** in outstanding invoices that require attention to ensure cash flow stability.
- Sales generated from this order amount to **500.40 LCY**, with an adjusted profit of **110.40 LCY** indicating profitability.
- The original profit percentage for this order is **22.1%**, reflecting a healthy profit margin.
- Currently, this customer has **2 ongoing sales orders** and **43 posted sales invoices**, demonstrating active engagement.
- There are **43 posted sales shipments** for this customer, while **0 ongoing sales quotes** suggest a gap in potential sales opportunities.

AI-generated content may be incorrect

View prompts

Ask a question

Copilot

- Gemma's Excel and Copilot Trick!

Other Stuff

- Manufacturing
- Field service integration with Service Management
- Subscription Billing
- Cost Adjustments error improvements
- Performance Profiler
- Concurrent posting to ledger entries
- And loads more...

Thank You.

Please reach out if you have any questions

Gemma Mooney - g.mooney@node4.co.uk

Andre Verster - a.verster@node4.co.uk

Please rate all sessions

let us know how we did

