*Your role as*

# ERP MANAGER

for Business Central
in an age of AI, apps
and constant change

# TABLE OF CONTENTS

Some of our colleagues recently attended an event, and a participant came up to them and said:

"Thank you for writing that guide. I got my boss to read it, and now he finally understands what my job is about."

That experience hits the mark. Because the ERP manager's role is often overlooked. Management may think they subscribe to a cloud solution, and then everything runs by itself. But it doesn't. There are a lot of tasks involved in keeping Business Central running, up to date, secure, and in step with the company's needs.

And those tasks increase every year. And this guide gets longer every year. That's because your role as ERP manager has grown broader.

Recently, AI agents have naturally become a major topic, but security is also a topic you need to give more and more attention to.

You don't have an ERP solution that stands still from the moment you put it into use. It evolves continuously, and that gives you new responsibilities and tasks.

This guide is about everything you need to have under control as an ERP manager when you have a Business Central in the cloud edition. We talk about strategy and best practice, and we introduce the tools you need to use.

Everything in this guide is about Business Central as a cloud solution. That's the edition Microsoft is investing in, and it's the edition that gets all new features first. We still meet companies that think they're running cloud because their Business Central is accessible through a browser at a hosting partner. But hosting is actually not cloud. This guide is about modern cloud, where you can use Apps and AI agents and all the new things.

Some ERP managers have a whole team behind them. Others are a single person who also has other tasks on the side.

Whatever your reality looks like, your role is important. And you can be proud to fill it, because you're the person who holds together one of the company's most central IT solutions.

The world is changing, and your Business Central changes with it. Our goal with this guide is to help you keep your solution effective and ready for change.

*written by humans*

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*For you who are the boss of an*

# ERP MANAGER

This is a guide for the person who in practice is responsible for Business Central in your company. But this summary is for you, their manager.

Business Central is a cloud solution, and it can seem as if it all runs by itself. It doesn't.

## The role of ERP manager is more important than you think.

Business Central is continuously updated by Microsoft. There are apps from external vendors that need to be managed. There is security and permissions. There are integrations. And there are more and more AI possibilities you need to relate to.

The ERP manager is the person who holds it all together. If no one carries the task, you'll only discover the problems when they're expensive: invoices that haven't been sent, decisions made on the wrong basis, an update that goes wrong, opportunities for fraud, or an audit that asks questions you can't answer.

## Three prerequisites

An ERP manager can only succeed with 3 things in place: **overview of the company's processes** in Business Central, **overview of the technical solution** (apps, customizations, integrations), and a **clear mandate from management**.


The first two are the ERP manager's own work. The third is yours.

What do you expect from Business Central? Is your goal that the solution just runs stably with as few changes as possible, or do you actively want to use new opportunities to optimize the business?

The answer to that question determines how the ERP manager should prioritize their time, and it's a decision you as a leader must make explicitly.

## Cloud = continuous change

Microsoft delivers two major updates a year and monthly fixes. It's not optional. The updates come, and they can affect processes, apps, and customizations.

Your ERP manager needs to keep an eye on what's coming, test it in a sandbox environment, and ensure that the organization is ready.

The same applies to apps. Many use functional extensions from external vendors, and they need to be maintained, updated, and tested in conjunction with the rest of the solution.

It's a permanent task, not something handled once a year.

If you have your own customizations, you have a technical debt that needs to be maintained at every update.

The ERP manager should continuously assess whether they are still necessary, or whether new standard functionality can take over. It saves money and reduces complexity.

## Security and compliance require attention

Business Central contains the company's most sensitive data. Permissions need to be managed, so employees only have access to what they need. Logs and monitoring need to be set up on critical areas. GDPR sets requirements for how personal data is handled. And the auditors expect that you can document who has access to what.

It's the ERP manager's responsibility to keep a handle on it. But it requires time, and it requires that you prioritize it, even when there's no acute crisis.

## AI agents are coming

Microsoft is building AI agents directly into Business Central. They are digital employees that can create sales orders, process vendor invoices, and perform other tasks that humans do today. The technology is new, but it matures quickly.

The ERP manager needs to manage the digital employees: manage their permissions, monitor their work, and adjust when something doesn't function. It's a new discipline, and it requires time to experiment and learn. If you want to benefit from AI in your ERP, then the ERP manager needs room to explore the possibilities.

## Proactivity costs less than firefighting

The difference between an organization that prevents and one that reacts is enormous. A fixed status meeting with the ERP vendor, a systematic review of upcoming updates, a regular check of operational processes. These aren't big investments in time, but they prevent the expensive surprises.

Process optimization is also part of the tasks. The ERP manager is the person in the organization who has the best foundation for spotting opportunities for optimization. But it requires that the person has time to look ahead and doesn't drown in daily operations.

## What does it take?

Give your ERP manager three things:

**Access**: To the system's Admin Center, to the vendor, to the rooms where decisions about IT and optimization are made.

**Time**: ERP management is not a side job. The more you use Business Central, the more apps you have, the more AI you put into use, the more time it requires. If you expect the ERP manager to also have a full calendar with other tasks, then there will only be time for firefighting.

**Backing**: Mandate to set requirements for the vendor, to carry out changes in processes, and to say no to what creates problems in the long term.

If you give your ERP manager that framework, then in return you get a Business Central solution that runs stably in everyday life, an organization that effectively takes advantage of the system's possibilities, and a foundation for taking advantage of all the optimization opportunities that the technological development offers.

# 1. YOUR PREPARATION

Your title is probably not "ERP manager", but you're reading along here because you're responsible for Business Central in your organization. That responsibility can have many different aspects, and we go into detail with it in this guide. Maybe you have one foot in the IT organization, or in the Finance department, or you're a super user and daily user, or you're a project manager. Or maybe you're a bit of everything.

And your responsibility is about:

- ensuring smooth operation, so business processes don't come to a halt
- managing roles, permissions, and data security in day-to-day work
- making sure the system supports the business when workflows change
- proactively optimizing processes and contributing to the business's efficiency and competitiveness

It's only four points, but it can be a big task. And the rest of the chapters in this guide go into detail with how you do all of this in practice.

But first we need to talk about the very basics: the knowledge and overview that's the foundation for carrying out your responsibility as ERP manager, and that at the same time helps define your position in the organization.

You have three homework assignments to solve before you start on any of the other things.

1. Know your processes
2. Know your solution
3. Know your mandate

This isn't meant as a scare campaign, but we can entertain you all day with examples of what goes wrong when you don't have an overview of the processes, the solution, and the responsibility.

We have experienced a new ERP manager coming in, who wasn't briefed on how Job Queues were set up, and suddenly discovered that no invoices had been sent out for a week, without knowing why.

We have experienced a sudden crisis because no one could post. Number Series had expired, and the person who used to renew them was no longer there, and no one knew the task. It's a simple task if you know what to do. But when responsibility and knowledge disappear with an employee who leaves, then two minutes of work can turn into half a day of panic.

We have experienced a lot, but let's jump into your three initial tasks so you avoid problems:

## 1. Know your processes

Your first preparation is to map your company's processes and how they're supported by Business Central. It sounds like a big project, and it can be, but it's necessary.

You can't manage what you don't know. It sounds like something that could be on a coffee mug, but it's the most overlooked task for an ERP manager: having a real overview of the processes in the company that are supported by Business Central.

You map the processes by going through the work tasks in all functions together with the employees who perform them. What do they do during a workday? It's a description of what actually happens, and not what should happen in theory.

But you don't have to do all the work yourself. The employees in each department know their own work tasks best. Your role is to start the mapping, ensure it gets done, and gather the result, so you get a complete picture of how Business Central supports the company's operations.

And it's a task that's relevant regardless of whether your company has just switched ERP system, or whether you've been running Business Central for many years. It's not only relevant in connection with switching systems.

The reality is that processes change all the time, new employees find new ways, and no one necessarily uses Business Central the same way as when it was first put into use. That's why you have to continuously keep your overview updated.

When you have a complete overview, you have the prerequisites to assess, for example, whether an update from Microsoft has impact on work processes, whether you can do without a customization (PTE) or an app without affecting work processes, or whether you can optimize processes with initiatives in Business Central.

Overview gives valuable opportunities. Without overview, you just have to guess, cross your fingers, and hope it goes well.

## 2. Know your solution

Your second homework is about the technical overview of your Business Central solution. What's actually implemented in your system. You need to know which parts of the solution are in use, and how they interact.

Business Central has over the years become a large system. That makes it hard to keep an overview. You have standard functionality, apps from Microsoft Marketplace, custom-built PTEs (customizations), API integrations, web services to other systems, Job Queues, approval workflows, and processes that span across all of the company's departments. It all hangs

together, and it all changes continuously with updates from Microsoft, from your app vendors, from your ERP partner, and from your own organization.

You especially need an overview of customizations (PTEs), apps, and integrations.

- PTE means “per tenant extension”, and it’s the customizations that have been developed specifically for your company, and only you know what they do.
- Apps are functional extensions that you get from Microsoft Marketplace, and they are usually thoroughly documented, so you can understand their functionality.
- Integrations receive or send data, and may create journal lines that subsequently need to be posted.

It’s unfortunately all too common that the ERP manager doesn’t have insight into the functionality of the PTEs in the solution. Maybe you’ve inherited them from a predecessor, or maybe it’s just been a long time since they were developed, and no one can remember the details.

Everything works fine, until you need to upgrade. Then it becomes urgent. Every six months Microsoft releases a major release, and all your PTEs and apps must be compatible with the new version before the update can be carried out. If a PTE or an app is not compatible, it blocks the update. And then you’re standing with the question: what does this PTE or App actually do? And could we maybe do without it?

These are questions you should be able to answer without calling your partner. And that requires that you have everything described.

If you or your predecessor have been deliberate about splitting customizations into separate, named PTEs per functional area, then it’s much easier to overview what is what. You can examine one at a time, and you can phase out a single customization without touching the rest.

But we see many companies where all customizations are gathered in one large PTE, typically named after the company’s own name. It’s a “black box” that’s hard to see through and even harder to take apart, if you eventually want to phase out parts of it.

For each PTE and app you should as a minimum have a description of:

- What does it do? Described in plain language. What is the purpose, and which business processes does it support?
- When was it developed, and at whose initiative?
- Which other parts of the solution does it interact with?
- How critical is it for the company’s operations?

The description must be accessible to you, to your successor, and to your management. It's a way to make your role and the value you create as ERP manager visible, that you have control of your solution.

But you can probably not maintain this description on your own. So set requirements for your vendor, so you get apps and PTEs described in a format you can use.

As a side note, it's also worth mentioning that an increasing number of companies have no PTEs at all. They use only the standard solution plus apps. That's actually a strong position to be in, because then you don't own the technical debt yourself. It lies with Microsoft and with your app vendors, and then you have one less concern. But you still need an overview of your apps and integrations.

## Documentation and AI

We've come this far without using the word "documentation", and that's entirely on purpose. The word "documentation" often makes people tired in the head, but we can hopefully agree that it's a good idea to have an overview of both the work processes and the solution.

But let's be honest: documentation has always been an area where good intentions and reality rarely meet. Most ERP managers know they should have better documentation. But most don't. Or it's outdated, because no one has maintained it.

You need to do something about it. Focus on what has the greatest effect. Create an overview in plain language instead of going into details. Don't make it hard. Then you're up and running. And then it needs to be maintained.

And that leads to an important point: As ERP manager, you should be the central hub for all changes to work processes that need to be supported by Business Central. All inquiries to your ERP partner, such as new requests, error reports, and changes in setup, should go through you. Because otherwise you can't keep the overview and maintain the documentation.

The traditional challenge with documentation is that it becomes outdated the moment someone changes something in the solution without telling you about it. And then it's rare that anyone gets the documentation updated afterwards.

But hey, you don't need to have headaches about the documentation task anymore. With AI tools it has become much easier.

If you use apps, you can take the technical file with the extension .app and ask an AI tool to read it through and describe what it does. Both at a technical level and at a user level.

It's honestly a task that consultants are used to spending days and weeks on solving, and today AI can write correct and useful technical documentation and user documentation in a few minutes. It's a wild development.

If you've inherited an old customization (PTE) that no one really knows the contents of, you can get AI to open the black box and tell you what's in there. It probably requires help from a consultant to get access to the right files, but the analysis and documentation itself AI can handle.

When you're using AI to analyze your files anyway, you can do it continuously, not as a big project every other year, but as a natural part of any change. Change something, run the file through, update the documentation. It's a manageable task. There's no longer any excuse.

You can also use AI to assess whether a new app risks colliding with something you already have running. If you have PTEs installed, you can put their technical files in together with a new app and ask AI to identify the places where they touch the same tables or processes, and which you should therefore test extra carefully.

It doesn't replace a real test in a sandbox. But it gives you a much better starting point for knowing what to test.

## 3. Know your mandate

Your third homework is about clarifying what management expects of you and of the Business Central solution.

The first two homework assignments give you a picture of how things look today. But you also need to know where the company wants to go. Is there an IT strategy that sets the direction? Is there a willingness to invest in new opportunities, such as AI, automation, or new apps? Or is the attitude that the solution should run stably with as few changes as possible?

These are decisions at a strategic level, and they affect your daily life as ERP manager. If management wants to be early with new features from Microsoft, you need to plan updates differently than if the strategy is to wait as long as possible. If there's an appetite for AI optimization of processes, then you need an overview of where the potential is greatest.

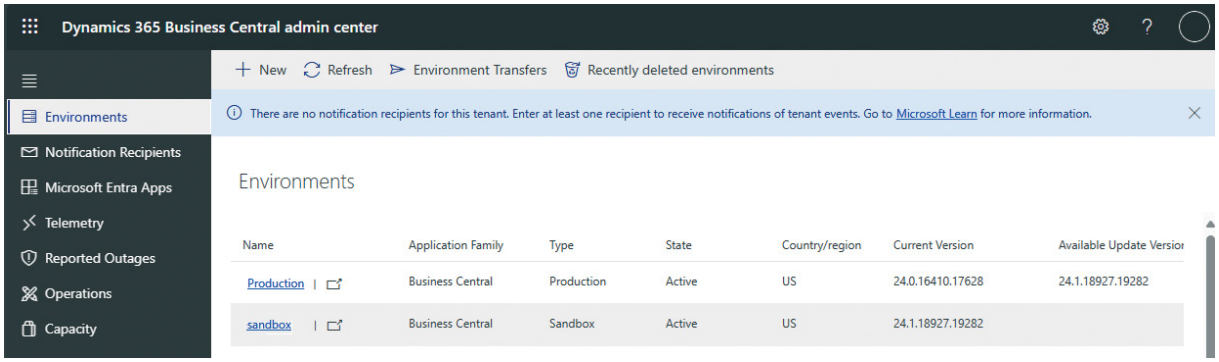
Your mandate also defines your position in the organization. If you have a clear mandate from management, then it's easier to prioritize, easier to say no to what doesn't fit, and easier to argue for the resources you need.

Clarify expectations with your manager. What is the ambition for Business Central? How much may you decide yourself? And what requires a management decision? Those are questions you need to have answers to before you can carry the rest of your responsibility.

# 2. ENVIRONMENTS

As ERP manager, you need to know the Admin Center. You access it via your Dynamics 365 account, and you can also get there directly from Business Central by clicking the gear icon in the upper right and choosing “Admin Center”. It requires that you have the right administrator permissions.

If you don’t have access to the Admin Center, then you should demand it internally. Without access you can’t create sandboxes yourself, update apps, or look across environments, and that holds you back in your work as ERP manager. It’s hard to take responsibility for a solution you don’t have access to administer.




In the Admin Center you can manage your environments, that is, the production environment with your Business Central that is in operation, and the sandboxes, where you can try out new apps and test new versions. You can also manage which apps are installed on each environment. And you can see whether updates have been released to the apps you use.

## Tenant, environments and companies

Before we go further, you need to understand how Business Central is put together. There are three levels: tenant, environments, and companies.

### Tenant

Your tenant is the top level, which contains all your Microsoft services such as Power Platform, Dynamics 365, and Microsoft 365 (Exchange, SharePoint, Teams) and Business Central. It is also at the tenant level that your Business Central licenses sit. That means a user with a license on your tenant can in principle work across all the environments that are created in the tenant, but you can limit access via permissions inside each environment.

### Environment

Inside that tenant you can create multiple environments for Business Central. Each environment is tied to a specific country and a specific localization, and you make that choice when the environment is created. It cannot be changed afterwards. All apps you install apply to the entire environment and are shared across the companies in the environment.

### Company

Inside each environment you can create multiple companies. A company corresponds to a legal entity or a business unit with its own accounting requirements.

By default, you get one production environment and three sandbox environments included in your subscription. If you need more production environments, for example because you do business in several countries, you can purchase them through your partner. Each additional production environment gives you three additional sandboxes and additional database capacity.

## Environments in multiple countries

If your company has activities in multiple countries, you need to decide how to organize your environments. It's a decision that has great significance in everyday life.

Each environment in Business Central is bound to one localization, that is, one country's legislation, VAT rules, bank formats, and reporting requirements. The localization for a given country is, for example, set up according to that country's accounting legislation, and it differs on absolutely crucial points from the localizations of other countries.

There are some companies that have multiple countries' companies together in one environment. That gives problems when your environment is, for example, set up with one country's localization, and you have another country's company in the same environment. Then that company will follow the first country's rules on the points where the localization governs. That of course doesn't work.

It can be entirely mundane things like bank account numbers, which have different lengths in different countries. But there are many differences between countries, for example payment formats: different countries use

different national payment schemes such as country-specific giro systems, direct debit schemes, or checks. And then there are also payroll formats, bank formats, and reporting to authorities, which are all country-specific.

The requirements for compliance are, by the way, becoming stricter. In many jurisdictions, new accounting legislation has introduced requirements for digital documents, and there are also greater requirements for SAF-T reporting. A Business Central with one country's localization cannot meet the requirements that another country's version is built for, so it's important that each country's company sits in an environment with the right localization.

A classic example of best practice is that a company in one country with a subsidiary in another country sets up two production environments: one with the localization for the first country for the business units in that country, and one with the localization for the second country for those there. The users are defined in the same tenant and can work in both environments. That's a setup that makes good sense for most international companies.

## Sandboxes

We also need to talk about development and test environments. It's a good idea that you have a sandbox environment where you can test apps and try out new ideas and possibilities. But if you have functionality developed for Business Central, then you also need a development environment.

There is nothing in Business Central that is named "development environment". There are production environments and sandbox environments, but you can dedicate one of your three sandboxes to being a development environment, where you test new functionality.

As ERP manager, you should not allow anyone to test directly in the production environment, install an app, or activate new features in Feature Management without having tested it in a sandbox environment, or in any other way put something into operation without having tested in a sandbox. (Much more about Apps and Feature Management comes in later sections.)

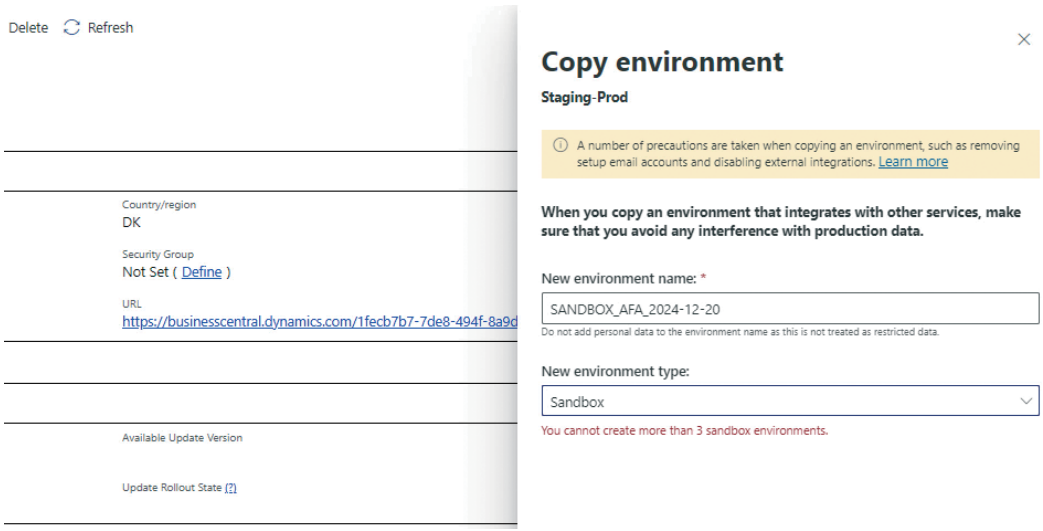
If you put code in production and find an error, then it's much more extensive to fix the error than if you had found the error in a development environment. You don't only need to fix the code. You also need to fix or reverse all the transactions and data that have been generated incorrectly while the error has been in operation. The system continues to generate incorrect data until you get the error fixed, so you're also under time pressure to stop the damage. The cleanup work can grow explosively in proportion to how small the original error was.

There are several reasons to test.

It's not only about discovering errors. It often happens that you become wiser along the way. Your ERP partner has developed exactly what you asked for, and it works flawlessly, but when you try it out, you find out that you've forgotten something, or that it could work smarter in a different way.

The devil is often in the detail of special exceptions to processes, and even experienced users and consultants can't think through all potential scenarios at first. You can't expect that.

In a sandbox, it's no problem to become wiser. In the production environment, it results in a lot of cleanup that could have been avoided.




Create a copy of your production environment as a sandbox and test the new features there. Then you have a test environment that is a true copy of your operations. That gives the best test. And remember to delete the old sandbox environments from the previous test. You can do that yourself in the Admin Center or get help from your partner.

When you create a new sandbox, it's a good idea to have a naming policy. Give the sandbox a name that tells who created it and when, for example with initials and date. Then you can afterwards see whom to ask whether the sandbox is still in use, or whether it can be deleted.

You should overall have an internal sandbox policy. How many sandboxes do you keep running? Who creates them, and who decides when they're deleted?

## Sandbox characteristics

When you create a sandbox as a copy of your production environment, you need to be aware that there are a number of processes that are stopped. Job Queues are stopped, and all scheduled tasks are paused. Integrations are deactivated. Email setup is deleted. Outgoing HTTP calls are blocked.

That means you can post an invoice without a Job Queue sending an email with the invoice to your customer. Or that you can enter test data without integrations synchronizing it to your other systems. That's very smart.

But if you've had development carried out or have installed apps, then you as ERP manager must make sure they also work in a sandbox without sending or synchronizing anything you don't want.

# 3. UPDATE AND TEST

One of the important things with a Cloud solution is that the producer continuously updates the solution.

Previously, you had to take the initiative for updates to the ERP solution yourself. It was, by the way, also quite extensive to upgrade. Therefore, ERP solutions often stood completely still, and if you waited 7 years to upgrade, you would miss all innovation and new, smart features over those 7 years.

With Business Central as a Cloud solution, updates are not optional. You will be updated. That's a premise you have to accept with Cloud. Microsoft automatically delivers two "major releases" each year (in April and October) and monthly "minor updates", as well as "hotfixes" when necessary.

It's in the two major releases that Microsoft introduces new functionality, and they're the ones you should keep the best eye on. The monthly updates are mostly about bug fixes, statutory changes, and improvements, and there are rarely breaking changes, so they are typically harmless to your operations.

News that is announced in a major release is, however, not always available immediately. Microsoft calls the two major releases Wave 1 (April) and Wave 2 (October), and they are to some extent an announcement of what Microsoft has on the drawing board. A large part of the functionality comes immediately, but some of what is announced is only released later, for example as optional features under Feature Management, which we'll come back to.

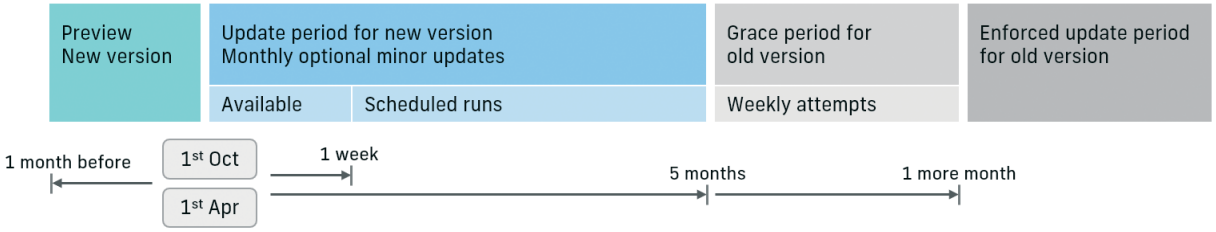
And once in a while, Microsoft announces something in a major release that ends up being postponed. The New Sales Pricing Experience is a notorious example: it has been announced in several release waves and has been postponed several times. And that's quite frustrating for both partners and customers, we can hint.

As an ERP manager who wants to keep things under control, you probably have to take Microsoft's announcement timings with a grain of salt. Microsoft has a plan, and they probably want to follow it, but there are many considerations that play in, and reality doesn't always end up looking like the plan.

But that doesn't change the fact that your solution regularly changes. And that creates a responsibility for you as ERP manager. You need to make sure that your organization can absorb the changes, so they don't come as a surprise to anyone. You need to know the changes, test them, and inform your users.

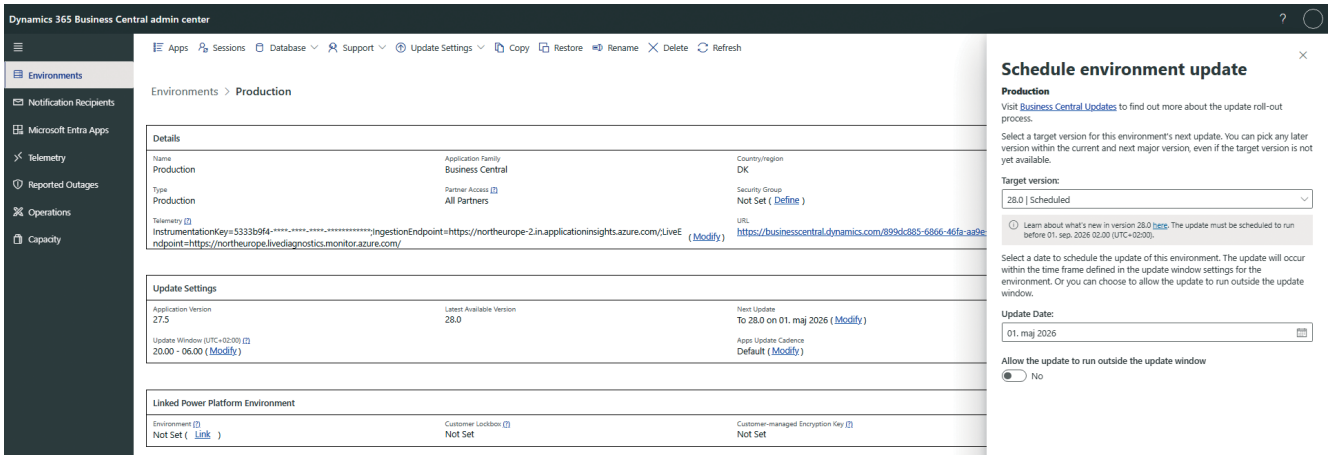
## Planning updates

The update window for major releases is 5 months, and Microsoft sends out updates in batches over several weeks, so not everyone is updated at once.




You can see in the Admin Center which date the update is scheduled for your environment. You can also set preferences for when you generally want updates to run, so Microsoft takes your preferred times into account.

And if the timing is still unfortunate, you can move it. Microsoft knows they shouldn't update right before Black Friday, but they don't know your company's calendar.




As ERP manager, you need to have a strategy for how quickly you want your solution updated. Do you want to be a first-mover, or do you want to wait as long as possible? It's a decision you should anchor with management, because it concerns the company's operational reliability and risk willingness.

You can postpone Microsoft's updates if you're not ready or don't want to be a first-mover. It may be that you need to test further, or you want to avoid the update coinciding with a busy period, a peak season, audit, or something else.

An important part of your responsibility as ERP manager is to keep an eye on those notifications. When you get notified that your environment is being updated on a specific date, you need to decide whether that timing fits, or whether you should push it.

Apps are automatically upgraded together with major releases. But between the major releases, you generally need to take the initiative yourself to update your apps if the vendors have released new versions. But you can also choose for apps to be updated automatically with all minor updates.

The monthly minor updates are in a way optional, because you can opt out of a monthly update if you want. You can actually opt out of all minor updates, until the next major update brings you up-to-date with everything you've skipped. But remember that if you opt out of the monthly updates, you'll also miss hotfixes and bug fixes continuously. It's a trade-off. You get peace by postponing, but you also don't benefit from the fixes Microsoft makes between the major releases.

When the 5-month update window expires, a grace period of one month begins, where you can no longer postpone. And when the grace period ends, Microsoft force-updates everyone, and if the update is blocked by incompatible apps or customizations (PTEs), those may be uninstalled to ensure that the update can complete. Data is not deleted in that situation, but you need to reinstall a compatible version yourself afterwards.

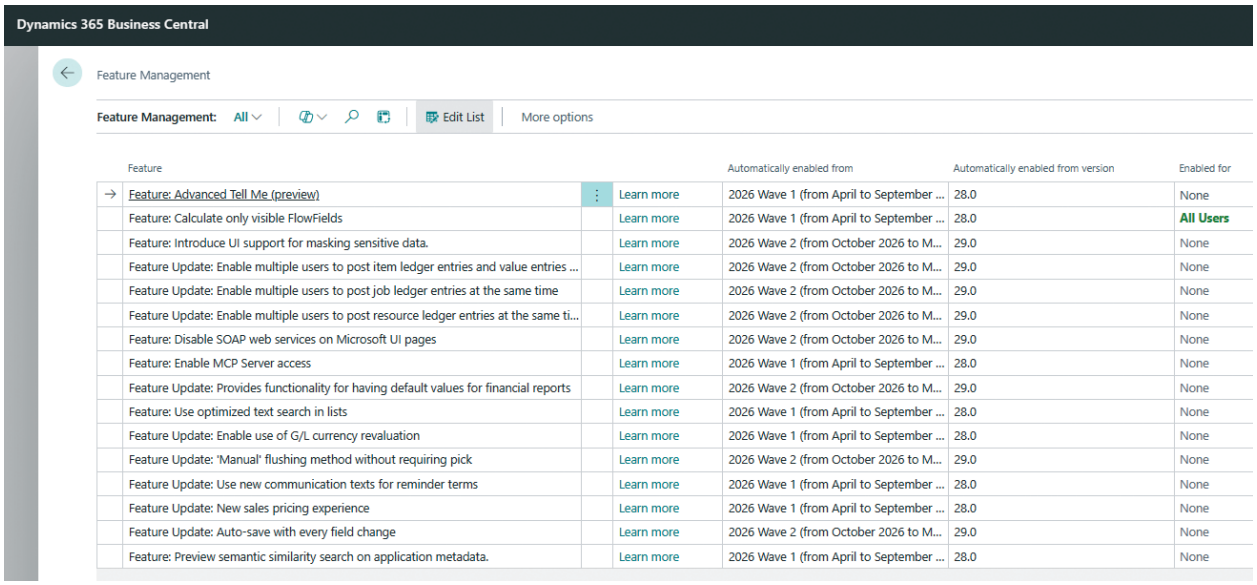
In the cloud edition of Business Central, you can therefore not postpone updates for many years and later take a large version jump. Updates are continuous and mandatory.

## New features in Feature Management

Most new features in Business Central are released directly in connection with an update. Microsoft sometimes uses a more "soft" rollout strategy by making the new feature available as an opt-in for a period before it becomes mandatory. That happens under Feature Management.

These "soft" releases are often features that require somewhat more thorough testing or configuration.

When Microsoft offers an optional new feature, you can choose to turn it on with a "feature switch", if you want to try it out. And at a later point in time, the feature becomes part of the standard solution.




| Feature | | Automatically enabled from | Automatically enabled from version | Enabled for |
|---|---|---|---|---|
| Feature: Advanced Tell Me (preview) | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | None |
| Feature: Calculate only visible FlowFields | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | **All Users** |
| Feature: Introduce UI support for masking sensitive data. | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature Update: Enable multiple users to post item ledger entries and value entries ... | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature Update: Enable multiple users to post job ledger entries at the same time | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature Update: Enable multiple users to post resource ledger entries at the same ti... | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature: Disable SOAP web services on Microsoft UI pages | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature: Enable MCP Server access | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | None |
| Feature Update: Provides functionality for having default values for financial reports | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature: Use optimized text search in lists | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | None |
| Feature Update: Enable use of G/L currency revaluation | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | None |
| Feature Update: 'Manual' flushing method without requiring pick | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature Update: Use new communication texts for reminder terms | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | None |
| Feature Update: New sales pricing experience | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | None |
| Feature Update: Auto-save with every field change | Learn more | 2026 Wave 2 (from October 2026 to M... | 29.0 | None |
| Feature: Preview semantic similarity search on application metadata. | Learn more | 2026 Wave 1 (from April to September ... | 28.0 | None |

You need to make sure to test that in a sandbox. Some of these kinds of feature switches cannot be turned off again once you've turned them on. That's the case when the feature changes the entire data model, so transactions are generated in a new way. Then you can't just go back to the old way. So you need to be sure of your case before you turn it on in the production environment.

On the Feature Management page in Business Central you can continuously keep an eye on which optional features are expected to become mandatory in the next major release.

But remember that when Microsoft announces that a feature will soon become mandatory, it doesn't always mean it happens on the announced date. Many features keep the plan, but some have been postponed so many times that we've lost count.

## Keep yourself informed

Lay down a fixed plan for how you stay informed about new features. Most companies tie this to the cadence of major releases: prior to April and October you go through what is coming, take a position on Feature Management, and plan your testing effort. Write it into the calendar as a fixed task, so it doesn't drown in everyday life.

Get help from your partner to keep yourself updated on Microsoft's plans for major releases. And go through the Feature Management page in Business Central as part of your fixed preparation for major releases, rather than looking at it randomly.

You can also use AI to give yourself a quick overview of the next major release. In the period leading up to a major release in April or October, ask an AI chatbot: "What's coming in the next version of Business Central, and is there anything relevant for a company focused on inventory and manufacturing?"

The more context you give, the better the answer you get. If you have your own process descriptions on hand, use them as a basis when you ask. Then the chatbot can compare what's coming from Microsoft with your company's concrete processes. Ask which processes you should specifically test beforehand.

It's not only Microsoft's own documentation that is out there on the internet. There is an active network of so-called MVPs (Most Valuable Professionals), who write blog posts about new features. An AI search can gather across those sources and give you an overview, even though most original material is in English.

It doesn't replace your partner's advice, but it gives you a better starting point for asking the right questions.

## Test before update

Let's have an honest conversation about testing. You should of course test updates in a sandbox before they hit the production environment. It's your responsibility as ERP manager to ensure that happens.

But most companies don't do it.

The "right" recommendation is that you should create a sandbox, run your critical processes through, and verify that everything works, before you accept the update in the production environment.

But if you want to prioritize the effort, you can expect that there are rarely problems with the standard functionality from Microsoft. They test the standard solution thoroughly, and the risk of problems is low. If you use apps, then there are slightly more opportunities for problems, but the professional app vendors will of course also test their apps against new versions in advance. The greatest risk lies in your own customizations (PTEs), because that's code that you yourself are responsible for maintaining and testing.

Microsoft gives you good opportunities to test before the new version is implemented in your production environment. You have 3 sandbox environments at your disposal for each production environment, and there you can test apps and updates without risk of disturbing operations.

Microsoft has also made it possible to upgrade a sandbox to an upcoming major release in preview, so you can begin testing in good time.

Some companies choose to perform the test in a test company in the production environment, because it's the easiest. That's just not very smart, because if an app creates problems, it doesn't only hit your test company. An app changes the entire environment, so an error will also hit your operations company. Use a sandbox to test.

But as said, the reality is that few companies test in a sandbox prior to each update. It's a bit like telling people they should exercise every day. Everyone agrees that it's a good idea, but it just doesn't always happen in practice.

So what do you do if you don't get the necessary testing done?

Is "retreat advice" even a word? You know, the kind of advice that isn't the optimal advice, but is the second-best advice if you don't follow the best one. Our "retreat advice" is: know your business.

Make sure that you have good knowledge of which processes run in your Business Central. If you know that the sales department uses a special customization for price calculation, or that the warehouse depends on a specific app for lot management, you're much better equipped to react quickly if a problem arises with an update.

You're also better equipped to prioritize the testing effort on the most important changes, so you don't "test for the sake of order", but focus the effort on the critical processes.

Your attitude toward testing updates should mostly depend on how critical operational stability is.

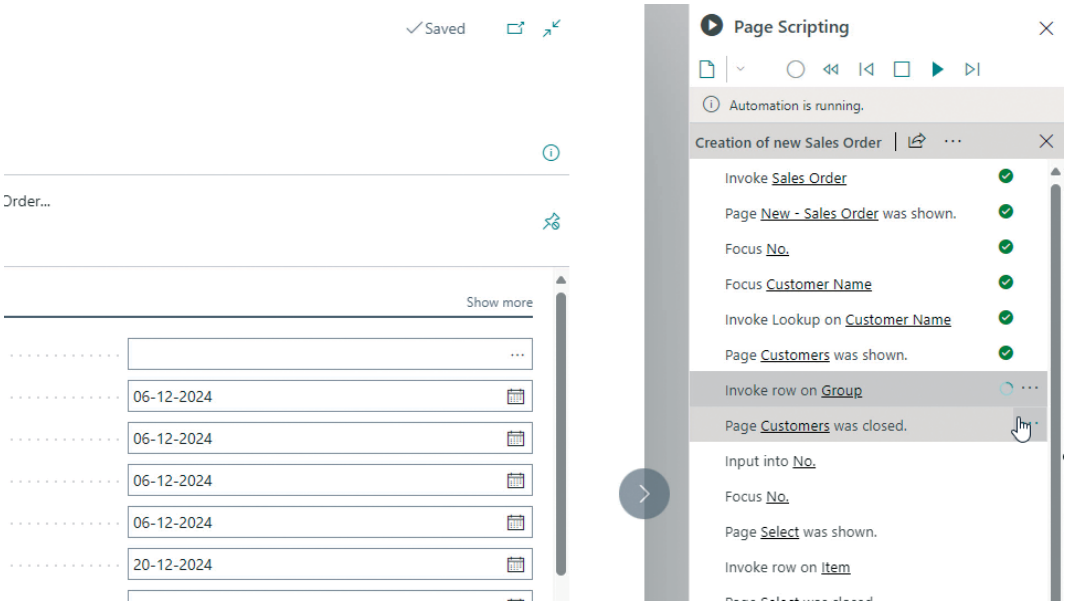
Experience shows that Microsoft rarely changes so much in the functionality from one version to the next that you can't continue work. What you could do yesterday, you can also do today. But maybe a button has been moved or renamed, or a new feature has appeared that you didn't ask for. That's annoying if it comes as a surprise, but it's rarely critical for operations.

If you don't test, then keep an overview of your company's processes, familiarize yourself with the content of upcoming updates, and assess whether there are potential conflicts.

## Systematized testing with Page Scripting

But let's sweeten the test work with a smart tool in Business Central, which is called Page Scripting, and it's relevant if you want to make your testing more systematic and easier to repeat.

You can record your critical work processes directly in Business Central, for example create a sales order, add three item lines, put on a lot number, create a pick document, and then you can subsequently play back the process.




When a new update arrives, you can in a sandbox environment install the upcoming version and play back the recorded processes and see whether they work or fail, without having to perform everything manually.

At the same time, your testing becomes uniform from time to time, because the machine plays back the processes the same way every time. It can check that a business process can be completed without errors, and you can also insert validation steps that check whether a specific field has the same value, for example a calculated price. That's really smart.

If you afterwards change a process, you can edit the recording and move steps around or insert new steps.

Page Scripting can catch a lot, but not everything. But it's still significantly easier than performing a manual test.

## What can go wrong with an update?

It has become popular to use Apps from Microsoft Marketplace.

But when a major release comes from Microsoft, it's actually errors in third-party apps that are the most frequent source of problems. It's a pattern that support staff know quite well. When Microsoft updates a batch of customers, you can suddenly see a trend in the inquiries to support, because the same app has a conflict with the new version.

Microsoft validates technically that apps on Marketplace are compatible with the new version, and that's something an app vendor is obligated to ensure. But you can't test everything, and it does happen that an app is approved and ready for the new version, but still has an error that only shows up in practice. And if you have multiple apps installed, they also need to work together, and no one has tested that for you.

When you choose apps, ask the vendor about their policy for compatibility. How do they test against new versions? How quickly do they react if problems arise? The more critical an app is for your operations, the more important it is to know what to expect from your vendor.

For your own customizations (PTEs), Microsoft automatically runs a compatibility check before an update. In the Admin Center you can check compatibility for your installed apps and PTEs in compatibility reports for upcoming versions. But get help from your partner to keep an eye on whether something gives an error in Microsoft's test, so you can manage to fix it before the update.

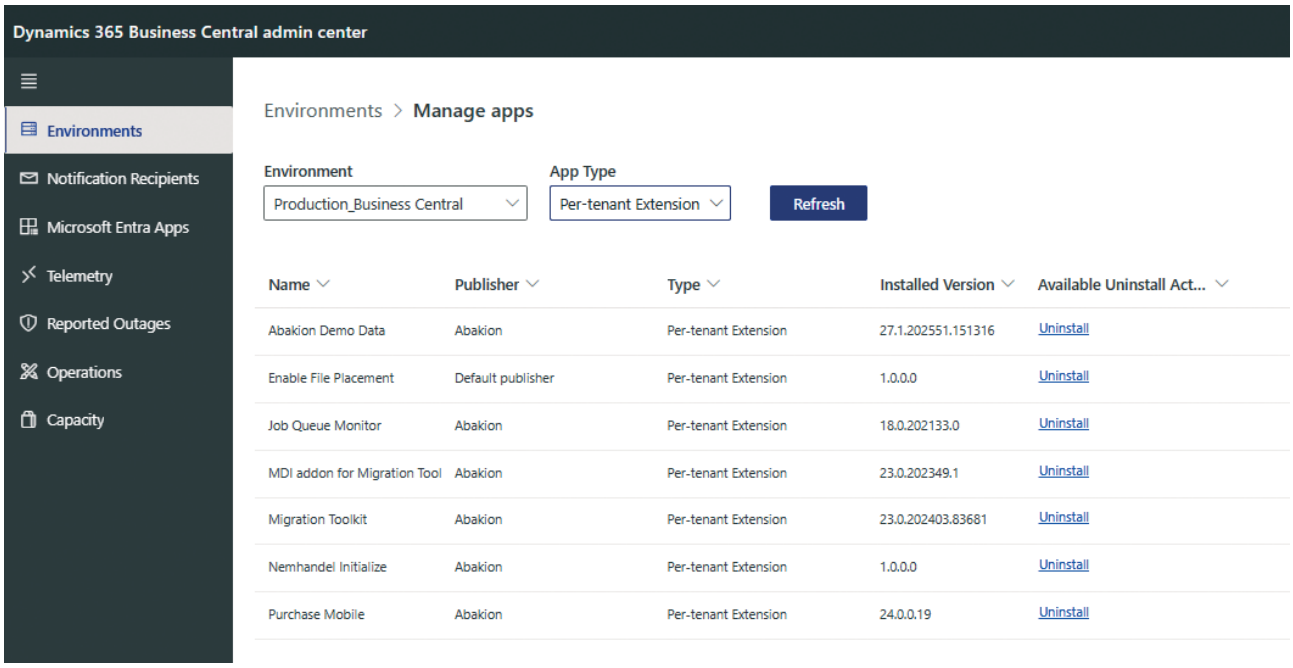
Make sure you have an overview of which apps and customizations (PTE) you have installed, and have a handle on whom to contact if something reports an error.

## Are your extensions still necessary?

When you're revisiting everything anyway prior to an update, it's a good time to ask another question: Do you still need all your extensions? And that applies not only to customizations (PTEs). It also applies to apps from Microsoft Marketplace.

Business Central is constantly evolving, and if your customization was developed two to three years ago, then it's not uncommon that Microsoft has in the meantime added new standard functionality that covers the same need.

If you're not aware of that, then you're paying for maintenance of a PTE that you no longer need, and you make your updates more complicated than they need to be. Each PTE is an extra component that needs to be tested and maintained at every major release.




Since 2024, Microsoft has made it possible to administer PTEs directly from the Admin Center, so you can see installed PTEs, upload new versions, and uninstall them the same way as Marketplace apps. That makes the technical administration easier.

But the Admin Center doesn't tell you what a PTE does, or whether you still need it. That assessment requires that you know the business processes that the PTE supports, and that you get help from your ERP partner to figure out whether a new standard feature can take over.

The initiative needs to come from you. Your partner rarely proposes on their own to retire a PTE they've built and maintain for you.

A good practice is to agree on a semi-annual update check with your ERP partner. A fixed meeting where you go through your installed apps and PTEs, assess compatibility with upcoming versions, and decide whether something can be retired. It's a task you may well set requirements for your partner on.

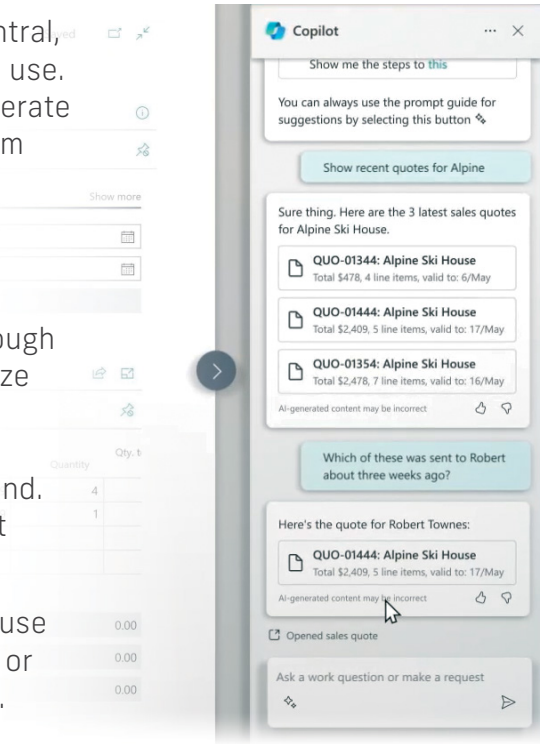
# 4. AI AND AGENTS

Microsoft talks about almost nothing but AI these days, and it's naturally also moving into your Business Central, and it's changing your role as ERP manager.

Although we mostly need to talk about AI agents in this chapter, we need to start by noting that you encounter AI in two different ways in Business Central:

## Copilot

Copilot is already a part of your Business Central, and it actually doesn't cost anything extra to use. You can ask it to summarize information, generate text suggestions, or analyze data directly from lists and records in Business Central.




Copilot is where most users encounter AI in Business Central for the first time.

You can ask Copilot instead of searching through menus and lists. And try letting Copilot analyze customer ledger entries and build the sales analysis you've asked a colleague to make in Excel. It doesn't require a technical background. It only requires that you know what you want answered.

Copilot is a strong support tool that you can use in your daily work, but it cannot change data or perform actions. That's the job of the agents.

## Agents

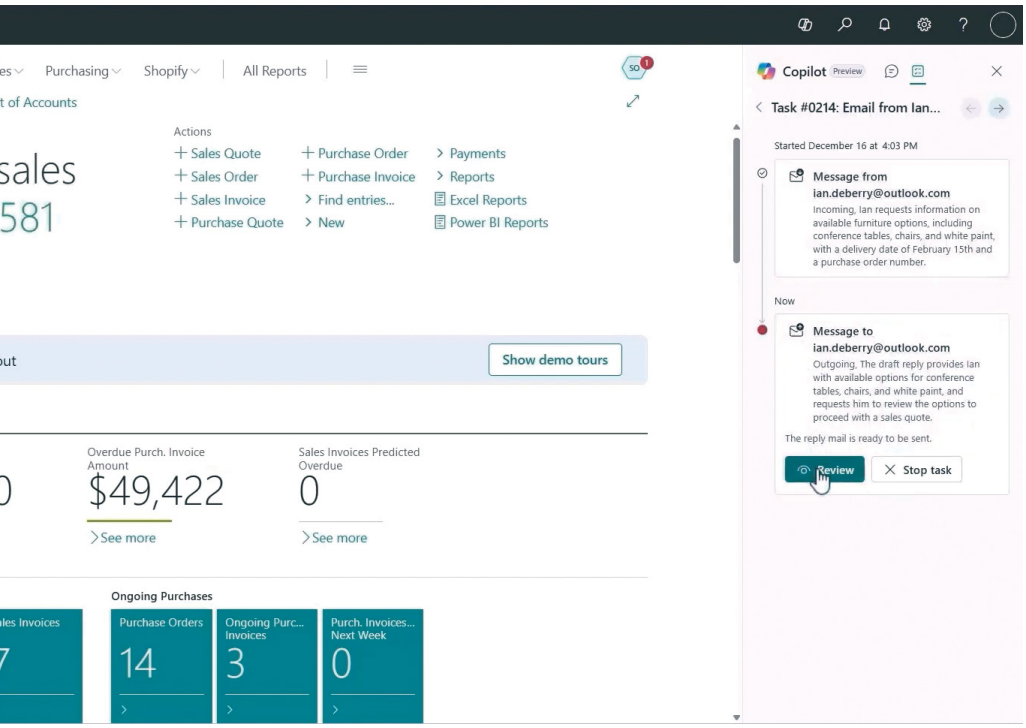
And Microsoft is building AI agents directly into Business Central. An agent is not just a smarter version of a Job Queue or a Power Automate flow. An agent can interpret a goal formulated in plain language, reason over your data, make decisions within the boundaries you set, and ask you for help when it's in doubt.

Autonomy is really smart, but you need to have control over it. Microsoft themselves use the expression "human-led, agent-operated" about the direction they're moving in. Humans set the direction and make the important decisions. The agents perform the concrete work.

## The roles change

The users' roles change. They will type less in Business Central, and instead chat with Copilot and delegate tasks to agents.

And your role as ERP manager changes in step with that development: you become a kind of team leader for all the agents. Not because you're the manager of the accounting department or the warehouse staff, but because you're responsible for what happens in your ERP system, and now there are new "employees" in that system that you need to keep an eye on.




## What can agents do today?

Microsoft has started with the most obvious agents for Business Central, and therefore they have a Sales Order Agent and Payables Agent, which they are continuously improving.

- Sales Order Agent monitors a shared mailbox for incoming emails from customers. When a customer sends an inquiry, the agent creates a sales quote with the requested items, checks inventory, sends the quote to the customer (when you have approved it), and converts it to a sales order when the customer confirms.

- Payables Agent works the same way for incoming vendor invoices. It monitors a mailbox, reads PDF invoices, finds the vendor in Business Central, suggests G/L coding based on history, matches to purchase orders, and creates a draft for a purchase invoice. The agent creates only drafts and only posts when you approve.

In addition to the two finished agents, there are two other paths to agents in Business Central:

- **Agent Playground** is a design tool that lives directly in Business Central. It came in public preview at the start of 2026, and it gives you the ability to build your own agents via instructions in natural language. That is, completely without code. It's a wild experience when you "code" for the first time by just instructing the agent with plain language. But Agent Playground only exists in sandbox environments, so for now it's only usable for testing.

- The other path is to build agents in **Copilot Studio**, which is part of Power Platform. Here you can build agents that live outside Business Central, but that can read and write in your Business Central via an MCP server (Model Context Protocol). We'll come back to that.

## Automation, chatbot, or agent

Before you throw yourself at agents, it's worth considering whether you need an agent, or whether a simpler solution can do the job. Let's just define the difference between automations, chatbots, and agents:

- **An automation** follows rules. When something specific happens, it performs a specific action. It's a Job Queue, a Power Automate flow, or another form of rule-based logic. There is no interpretation or intelligence involved, only rules. If you have a process where the criteria are clear and predictable, then an automation is the best choice.

- **A chatbot** answers questions. You write to it, and it finds an answer in the knowledge sources you've given it access to. That could be, for example, master data on items in Business Central, product sheets in a SharePoint folder, and closed support cases about the products in a customer system. Then it can answer questions about your products. It does not change data, and it does not perform actions. It finds information and formulates an answer.

- **An agent** performs actions. It can create a sales order, update a purchase line, or send an email. Of course based on your instructions and boundaries, but within the given framework, it will reason over the situation and perform an action. That's the crucial difference: the agent can perform actions in your Business Central.

AI agents perform best where you don't have a direct "if-then" scenario. If the process is predictable and has a fixed sequence, then a classic automation is easier and actually more reliable.

But if the process requires that someone assesses data, handles exceptions, and adapts to variations, for example reading a vendor invoice in varying formats, then an agent makes sense.

Consider whether a task even requires AI. First investigate whether there's an app on Microsoft Marketplace that solves the task (there often is), or whether an ordinary automation is enough.

## Humans always have responsibility

We need to talk about responsibility, and it's a topic that often disappears in the joyful rush over the agents' efficiency, but it comes back like a hangover when a user says, "It wasn't me who posted that incorrectly. It was my agent."

No one can put aside responsibility. Your postings in Business Central are still yours, even if you've been advised by AI. That applies regardless of whether you've asked a chatbot for advice or let an agent post or change master data.

It feels like an easy excuse to say that it was the agent that did it. But the responsibility is yours. If you have set up a posting group incorrectly, then you bear the responsibility. The fact that you've chosen to use an agent does not change that allocation of responsibility.

There are two different aspects of responsibility we need to talk about.

1. One is about the advice you and your colleagues obtain from AI tools outside Business Central. You need to have a policy for who may use AI help for what.
2. The other aspect is about what agents do inside Business Central. There you have Microsoft's "human-in-the-loop" principle and can configure how tightly you want to hold control.

## 1. Responsibility for good advice from AI

Today, users who encounter a challenge in Business Central will often ask an AI tool instead of calling a consultant. And AI tools can give usable answers, but they can also misunderstand or be wrong.

But the most problematic is if the AI tool doesn't have enough context. When AI doesn't know your entire setup, it will attempt to answer your specific question based on insufficient premises.

It requires professional expertise to assess whether an AI answer is correct. If an employee without experience asks an AI tool for help to change a setup, then the person has no prerequisites for assessing whether the answer is right. Common sense requires professional ballast.

As ERP manager, you should have an attitude on how your organization uses AI tools in connection with ERP. When is it okay to ask an AI tool? And when does it require a professional? How thoroughly should it be tested, and who is responsible for testing?

## 2. Responsibility for agents' actions

Microsoft's agents are designed so you can choose how much control you want. They call that "human-in-the-loop". You are part of the process, and you can approve, reject, or adjust what the agent does.

The principle is not new. You know it from other areas in Business Central. When you set up a Job Queue that posts automatically, you typically run the process manually a number of times first to make sure it does the right thing. Only when you have confidence that it works do you let it run automatically. It's the same mindset you need to have with agents.

Continuously consider which control points you can remove because you have sufficient trust in the agent. And be ready to introduce new control points if you start to see errors.

Sales Order Agent, for example, sends notifications to your Role Center every time it needs your attention, for example when it wants to send an email to a customer, when it lacks data, or when it needs an approval.

And Payables Agent only creates drafts and asks you to review before anything is posted.

## Permissions for agents

You already know permission management in Business Central. You know that you should not give all employees super permissions, and you know that the auditors will point that out if you do. The same logic applies to agents. We're not going into depth with permission management for agents here, but the principles you know from the chapter on roles and permissions also apply to your agents.

When you set up an agent in Agent Playground, you give it a profile and a set of permissions, exactly as you give a user. The profile determines which pages and menu items the agent can see, and the permissions determine what it may do: read, create, edit, delete.

With Copilot Studio it works differently. Here you connect the agent to Business Central via an MCP connection, and it does not have access to the user interface itself or menu items in Business Central. Instead, access is controlled by whether the MCP connection is set up with read, edit, or delete permissions.

Think of it the way you already know: When you hire a new employee, you give the person access to specific parts of the system, explain the work tasks, and keep an eye on whether things are done correctly in the beginning. You of course don't give a new warehouse employee super-user permissions in Business Central. You give them a scanner and a bounded process, because that's what they need to perform their work.

That's how your approach to agents should also be: You give them a role, a set of permissions, and some instructions. And then you keep an eye on whether they do what you've asked them to.

## Agents are not the same as humans

You may think we're making agents sound like ordinary users. And agents also behave just like ordinary users, but they have a different personality than humans.

The difference from a human employee is that an agent always follows the rules you've given it. It doesn't take a quick shortcut because it's late in the day, and it doesn't forget a procedure because it's busy.

But it also doesn't have the common sense that an experienced employee has. If you've asked your agent to always suggest the item that has historically sold best, then it will do exactly what you asked. And then it will always suggest the red t-shirt to all customers, while the blue and green ones gather dust in the warehouse.

A salesperson would after three to four orders begin to think about whether this was actually right. The agent just plows on.

It's an important point to take with you: an agent's "common sense" is predictable, because it has exactly the sense you ask it to have. By contrast, it's more unpredictable with humans, where experience, situational awareness, and personal relationships play in. Both have advantages and disadvantages, and as ERP manager you need to have control of your agents' sense.

That also means you need to test agents differently than you test humans. An employee can become tired, distracted, or take a shortcut, and that's why you test whether the person can perform a process correctly every time. An agent does not have that problem. If it does something correctly once, it will also do it correctly the next time.

By contrast, agents make other types of errors. They can misunderstand an instruction, handle an exception incorrectly, or draw an incorrect conclusion from your data. And you don't discover that kind of error by testing the same scenario twice. You discover them by testing with variations: other data, other combinations, other exceptions. Don't assume that a simple task is automatically handled correctly just because it seems simple. You need to test much more thoroughly in the beginning than you think is necessary.

## What does it cost?

The finished agents in Business Central and your own agents built in Copilot Studio consume "credits". And we don't even dare write in a guide like this what it costs to use agents, because the price model will surely change continuously.

But as ERP manager, you need to have control over how much it costs to use agents, and whether it can pay off. It is certainly not free. It's a good idea to keep an eye on consumption, especially in the beginning, so you can assess whether the costs are in reasonable proportion to the time savings.

# Agent Playground

With Agent Playground you can design agents yourself directly in Business Central. If you know Sales Order Agent or Payables Agent, then you know the interface they live in: a small icon in the upper right, a task pane on the side of the screen, notifications on the Role Center. Agent Playground gives you the ability to build your own agent in the same style.

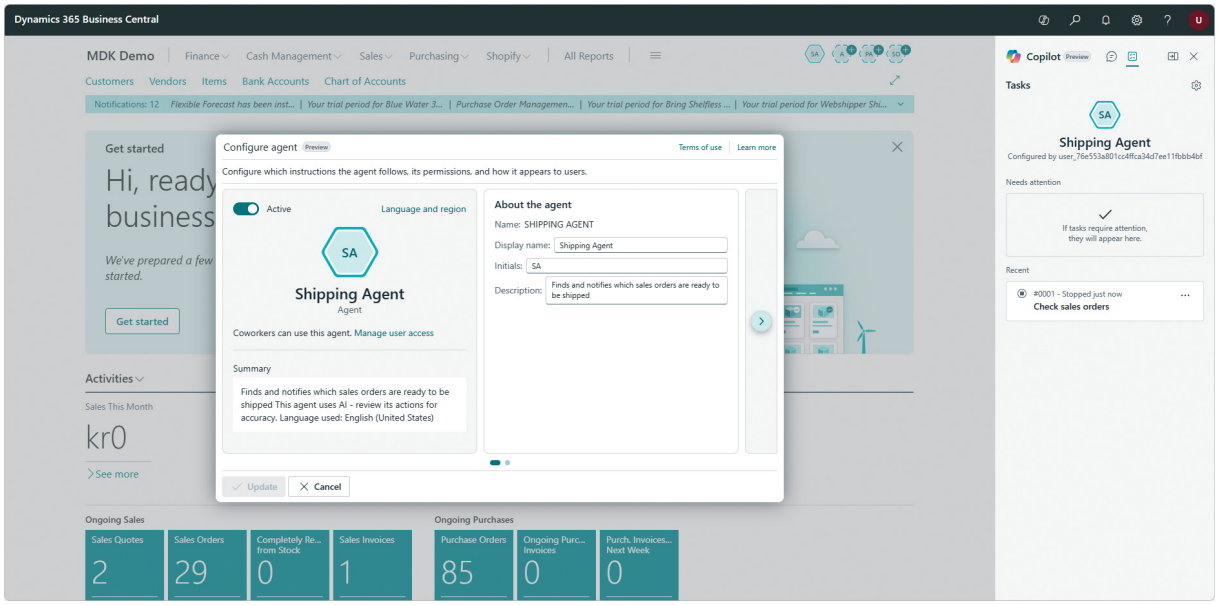
What's interesting is that there is no code involved. You write instructions in plain language: what it should do, what it must not do, and when it should ask for help. If you can explain a process with words, you can in principle get the agent to perform it.

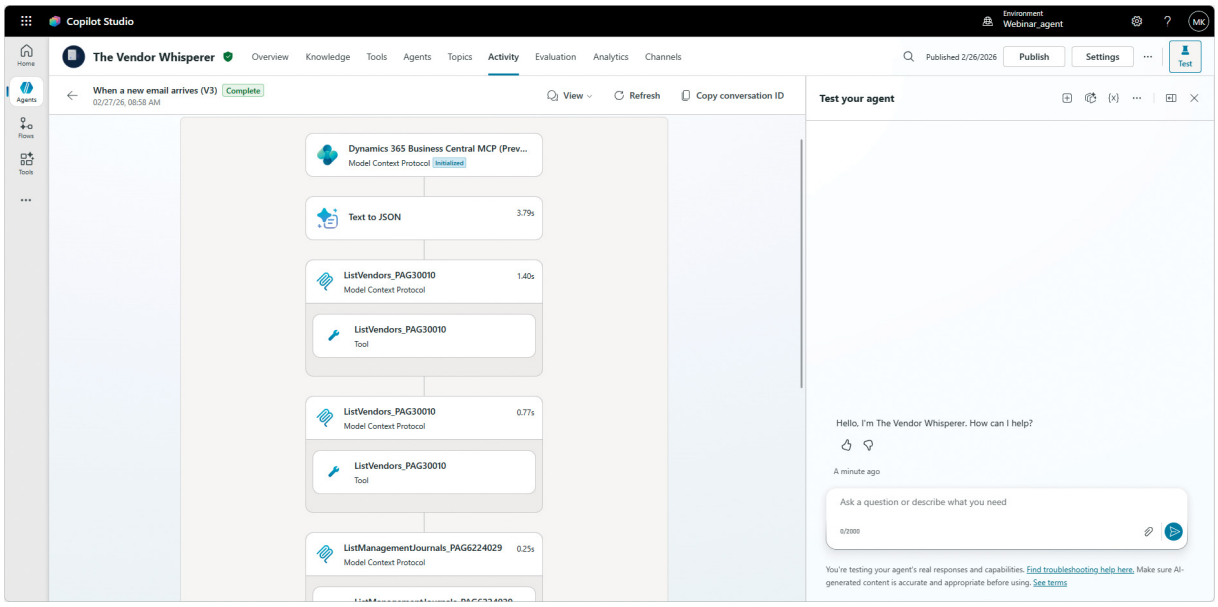
But it's called Playground for a reason. It only exists in sandbox environments, and it's not ready for production.

Microsoft has launched it to let users and partners experiment and gather experiences with what works, and what goes wrong.

The advice to you as ERP manager is clear: you don't have an operational responsibility for Agent Playground, because it only runs in the sandbox. But you can do yourself a favor by beginning to play with it already now. When the technology matures and becomes ready for production, then you're well prepared to quickly be able to set process optimization in motion.

It's Microsoft's vision that agents become the backbone of building business processes going forward. Whatever you think of that vision, it's smart to understand what's coming.






# Agents outside Business Central

Agents don't have to live inside Business Central. With Copilot Studio, which is part of Power Platform, you can build agents that live somewhere completely different, for example in Teams, on a website, in Outlook, but that can read and write in Business Central.

The connection between Copilot Studio and Business Central happens via an MCP server (Model Context Protocol). MCP is an open standard that makes it possible for AI agents to understand data structure and perform actions in other systems.

In practice it means that inside Business Central you configure which APIs the agent may use, and in Copilot Studio you build the agent and its logic.

The setup in Business Central is relatively simple. You find the "MCP Server Configuration" page, create a configuration, and add the API pages the agent should have access to. For each API you can choose whether the agent may read, create, change, or delete data.

In Copilot Studio you add the MCP connection, and then the agent has access to the data and functions you've exposed. From there you build the agent with instructions, triggers, and any Power Automate flows.

As ERP manager you don't need to build agents yourself. But you should know what is possible, and you should be able to ask the right questions to your partner and to colleagues who are working on AI initiatives elsewhere in the company: Can this process be automated with an agent? What does it take? What are the risks? And how do we maintain control?

# Think bigger but maintain control

With AI agents it is easier and faster to get started with automations than ever. You don't need a developer to write code. You can formulate a process in natural language and get an agent to perform it. It's a wild change.

But easier to build does not mean easier to manage. An agent that can click on menu items and update data can also make errors at scale, if it's not set up correctly. And errors scale lightning-fast, because the agent doesn't stop and think "this seems wrong" the way a human would.

If you build many agents, you risk that different agents work in opposite directions, without anyone having the full overview. One agent lowers a value, another raises it, and then they just plow on, and one day a customer calls and asks why they receive 32 emails a day from the agents.

Here is a practical action plan you can use as a starting point:

1. Understand what exists. Know the finished agents from Microsoft. Know the possibilities in Agent Playground and Copilot Studio. You don't need to master the technology, but you need to know enough to ask good questions. Also keep an eye on whether Microsoft releases new standard agents that are relevant for your company. The technology moves fast, and a standard agent in half a year may cover a need that you today solve manually.
2. Test in the sandbox. Copy your production environment to a sandbox and experiment there. It's exactly the same recommendation that applies to apps and updates, and it applies to an even greater degree for agents.
3. Involve your partner. Agents in Copilot Studio require knowledge of both Power Platform and Business Central. It's a collaboration that typically requires competencies from both worlds.
4. Lay down a strategy. When are AI agents the answer? When is an app better? When is a Power Automate flow enough? And when is the right solution simply to call a consultant? You shouldn't use AI on everything, but you should have an attitude on when it makes sense.
5. Optimize continuously. An agent is not something you implement and forget. You need to revisit your agents, assess whether they still do the right thing, and adjust instructions and permissions when your processes change.

Also keep an eye on whether new functionality or new agents from Microsoft give occasion to change your own agents. Test, evaluate, adjust, repeat. A good process with agents is a process you continuously improve, just as you do with all other processes in your Business Central.

# 5. APPS

It's not so many years ago that customizations in an ERP system meant that a developer wrote directly on top of the source code delivered from Microsoft. It worked, but unfortunately you also wrecked the source code in the process. And when Microsoft then released a new version, all the overwritten code had to be reviewed and adapted, and that's why upgrades were so extensive.

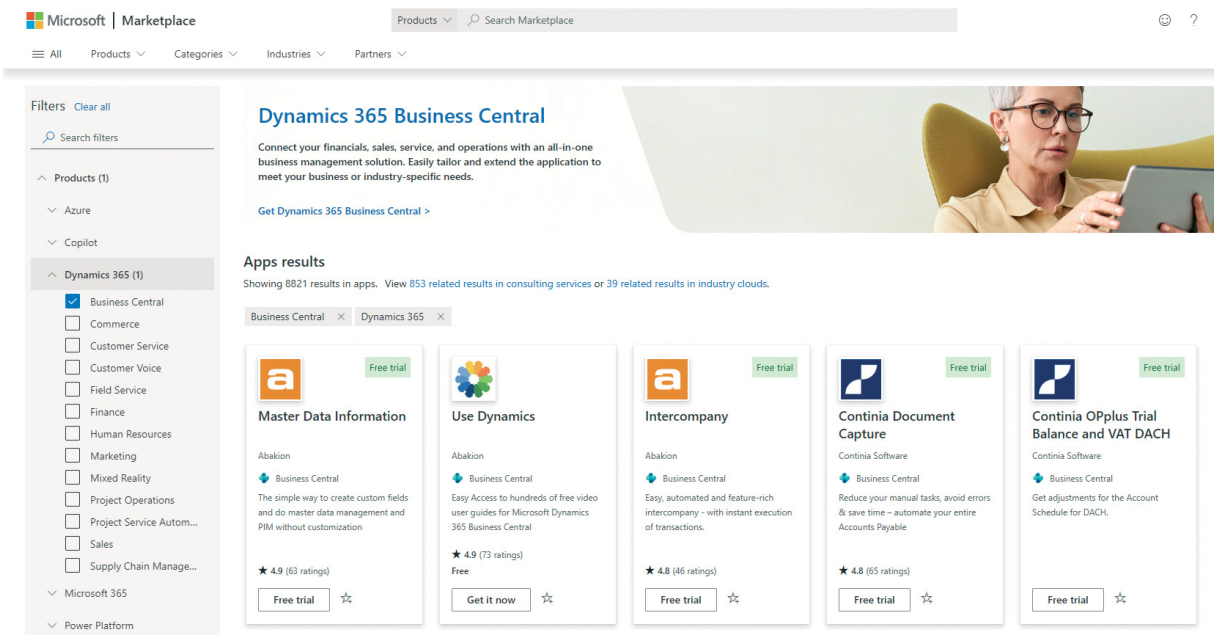
Today it works differently. When you install an extension, either an app from Microsoft Marketplace or a custom-built PTE, it does not write on top of the source code. It listens for specific events inside the standard code and reacts to them.

It works like a hook that latches onto a point in the code. When Business Central comes to that point, the extension steps in and adds its functionality. But the standard code itself is untouched.

That is the architecture that makes it possible to update Business Central continuously without destroying your customizations. The standard code can be replaced, and as long as your extensions can still latch onto the right places, then everything works.

You can have an extension developed specifically for your solution, and that's called a Per Tenant Extension, abbreviated PTE. Or you can install an app from Microsoft Marketplace (which was called AppSource in the old days and is still often called that).

Apps are developed by Microsoft partners, and they are approved by Microsoft and meet their documentation requirements, and while they make it easy to extend functionality, you also need to handle them in a specific way.



## Your strategy for functional needs

When you as ERP manager are faced with a functional need that Business Central doesn't immediately cover, it's a good idea to have a specific sequence for how you solve it.

1. The first step is always to investigate whether standard Business Central can solve the need. It's not uncommon that a feature already exists, but has never been put into use. Maybe it just requires a bit of setup and user training.
2. If the standard solution doesn't reach, then look for an app on Microsoft Marketplace. There are many thousands of apps available, and there's a good chance that someone has already solved your problem.
3. Only if neither the standard solution nor an existing app covers the need should you consider a PTE, a customer-specific development. A PTE gives you exactly the functionality you need, but you own the technical debt yourself.

## Choose apps over customization

So in this chapter we make a push for you to choose apps over custom-developed customizations, where it's possible, so you don't have to carry technical debt with every update in the future.

When Microsoft publishes a partner's app on Microsoft Marketplace, Microsoft has checked that the app works with Business Central. They guarantee that the app can be run without setting Business Central on fire, and the app vendor carries the technical debt of ensuring that the app also works in future updates.

But Microsoft takes no responsibility for the app being wisely developed, or that it's smart to use.

As ERP manager, you have to take responsibility yourself for choosing the right apps. You can of course lean a bit on stars and reviews on Microsoft Marketplace, but it's a really good idea to ask your ERP partner which apps they have good experiences with.

As a rule, they can give you advice about the most known and most frequently used apps within a functional area, for example solutions for expense management or integration to a shipping agent.

The more specifically you can define your requirements and wishes, the better advice you can get to compare possible apps on functionality, acquisition price, and operation.

Sometimes companies experience that their ERP partner would rather develop than recommend apps, and that may be because their business is still focused on development and consultant hours. We often experience that

companies in that situation research on Microsoft Marketplace themselves, and that's a good idea.

Find a selection of apps on Microsoft Marketplace that look promising for your need. Check that they are compatible with your country version. Investigate the app vendor's website. Check whether they have demo videos, release notes, and the like, which signal that they approach the task professionally.

It's not at all certain that your ERP partner has a handle on what's available in terms of apps. It's also hard to keep up, because there are many thousands of apps on Microsoft Marketplace, so you can't expect your partner to know all possibilities, and it probably requires that you pay your partner to research.

So if you have the courage for it, take the lead yourself. It might be that you have a need to add charges to sales orders. Business Central isn't very good at that as standard. But maybe someone has made an app for it.

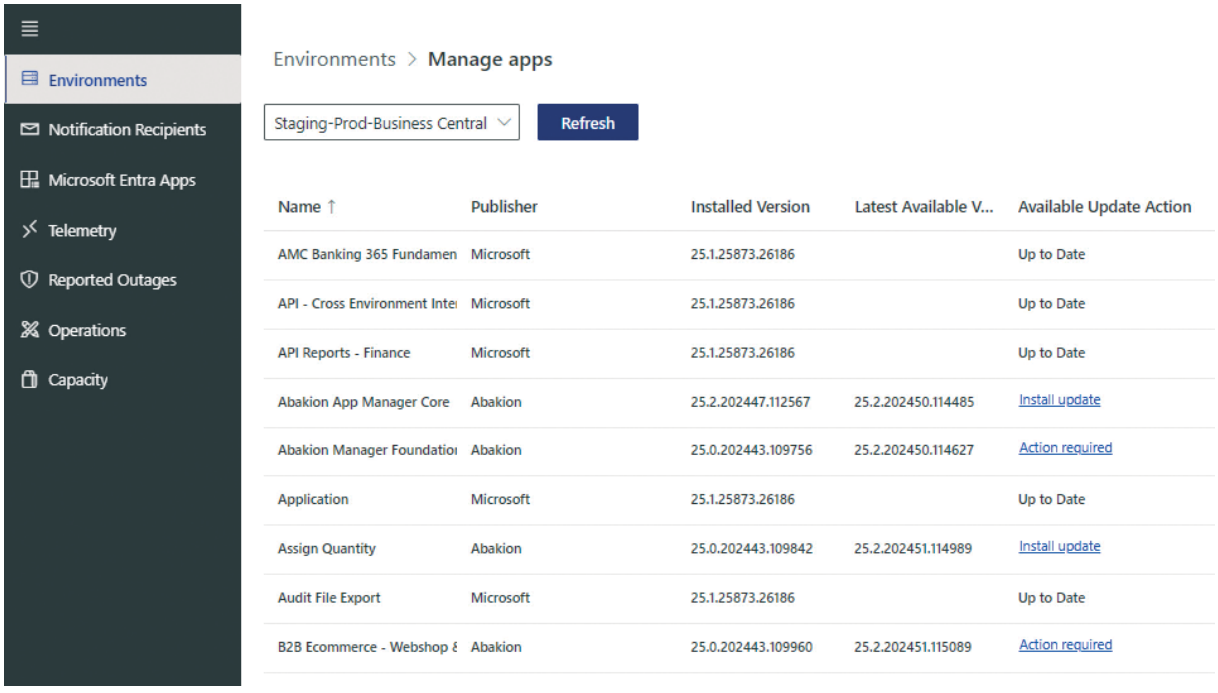
It could also be that you need provision for bonuses. Business Central isn't very good at that as standard either. But maybe an app exists.

And if there's an app that looks promising, you can challenge your ERP partner on whether you shouldn't together look more closely at that app.

## Updating apps

The app vendors are responsible for their apps meeting Microsoft's requirements and being updated to the newest version of Business Central, in contrast to custom additions (PTE) where you yourself have that responsibility.

Microsoft has consolidated the administration of both PTEs and Marketplace apps in the Admin Center. There you can see all installed extensions and manage updates.



By default, Business Central only updates your apps in connection with major updates (April and October). But you can change the setting to "With minor and major updates", and then app updates follow with each monthly update of Business Central.

Regardless of what you choose, Microsoft can force an app update through at a minor update, if the installed version of the app would otherwise break. So the setting gives you control, but not veto rights. You've also read about that in the chapter on update.

If you use apps from several different vendors, then it's not enough that they each work error-free on the new version — they also need to work error-free with each other.

Maybe you can outsource the responsibility and the test task to your ERP partner, but you have the overall responsibility for the task being carried out. You cannot count on your ERP partner proactively testing the total solution before an update, if you haven't agreed on the task with them.

You also need to consider whether the partner knows your company's processes in enough detail to perform a test that gives you certainty. If the test becomes too overall and generic, then it creates false security.

## Deleting apps

If you choose to uninstall an app, then Business Central by default keeps all the app's data in the database. That actually means you can change your mind and reinstall it without losing anything.

But if you're sure you'll never use the app again, you can turn on "Delete Extension Data" during the uninstallation, and then Business Central deletes the tables permanently. That decision you cannot regret.

Also be aware that uninstalled apps where you have not deleted data still take up space and can potentially affect performance. The data model still loads data from uninstalled extensions.

# 6. SECURITY

As ERP manager, you may not have IT security as your primary area of responsibility. But your Business Central contains the company's most sensitive and business-critical data.

That makes security something you have to relate to, even if you have an IT department that takes care of the technical.

So, now you're getting the basic security topics that you as ERP manager need to have a handle on.

## 1. Use multi-factor authentication

Multi-factor authentication (MFA) is one of the most effective security measures you can have. The principle is simple: When you log in, you need to confirm your identity with more than just a password. Typically by approving on your phone.

MFA is in rapid development. A short time ago you would get an SMS with a one-time code. Then we got an app, Microsoft Authenticator, where you have to approve a login. Better methods are constantly coming.

## 2. Passwords are becoming less important

Passwords, on the other hand, are becoming secondary. Microsoft's own recommendations are now that passwords don't need to expire, that they should be at least 14 characters long, and that you should not use more energy on it than that.

The reason is simple: The harder we make it for ourselves, the easier we make it for the attackers. If you have to change your password every month, and it has to be complex, you end up choosing something you can remember, and then you just change the last character every month.

Computers have become so fast at guessing passwords with brute force that the only real defense is to limit the number of login attempts and supplement with multi-factor authentication. When you can only try to log in ten times before the account is locked, then a computer can't sit and fire off thousands of guesses per second.

If you still use passwords, then choose something that's unique to you. Make a sentence in your head, and use, for example, the first three letters of each word. Base it on something that means something to you, but that's not a name or a word that can be looked up.

The best you can do is to minimize the number of places where you even have a password. Use your Microsoft account or Google account to log in

to other services, so you only have one place where you need to maintain security. Then you can make that one place really secure.

Many use password managers to generate and store strong passwords. That can work fine, but it needs to be done properly. Use a professional password manager with a strong master code and two-factor authentication. Never store passwords in a Word or Excel document, not even if you password-protect the file.

Hackers rarely go after your local files. They hack databases at the services you're signed up to. When a shopping site is compromised, attackers gain access to thousands of email addresses and hashed passwords. And then they try the same combination on all other services. That's why it's crucial that you don't reuse passwords.

## 3. Humans are dangerous

It is unfortunately the case that employees continue to be the greatest security risk. The volume of cyber attacks is frightening and unfortunately increasing.

The classic threat is phishing: An email that looks credible, but that lures you into clicking on a link or surrendering your login credentials. It has existed for many years, and most know about it. But the attacks are becoming more sophisticated.

With AI, you can now clone a voice and call up as another person. An attacker can pose as your director and ask you to transfer money or hand over access credentials. It can be hard to tell the difference, especially if you don't know the person well.

The countermeasure is clear procedures. Make sure to agree that your director will never send an SMS about transferring money. There will never come an email that just says "pay this". Payments and access changes should always go through the right channels, and critical actions should be confirmed personally face-to-face or with an agreed security word.

As ERP manager, you should ensure that all employees who can carry out financial transactions in Business Central have fixed procedures for verification. The same applies to employees responsible for security-related changes.

## 4. Use Microsoft's Security Defaults

Microsoft continuously expands their security package, and as a minimum you should have Microsoft's Security Defaults turned on. It's a collection of basic security settings that Microsoft maintains and updates.

Security Defaults is not the most advanced security level, but it ensures that your baseline keeps up with the times. New security requirements are

gradually added, and after a period Microsoft makes them standard. That means your security moves with it, without you needing to have great insight into what is changing.

For all companies using Microsoft 365 and Business Central, Security Defaults should as a minimum be activated.

## 5. Get a handle on backup procedures

Backup is unfortunately still an area where many companies stumble, not because they lack a backup, but because they don't regularly check that it works.

Make sure that backup is taken of everything: emails, files in OneDrive, SharePoint, and of course Business Central. Microsoft stores backups of Business Central for 28 days back, and you can yourself start a restore from the Admin Center. But that only covers Business Central itself.

Your files in OneDrive and SharePoint are also vulnerable. If your computer is hit by ransomware that encrypts all files, then the encrypted files are automatically synchronized up to OneDrive.

Therefore you should have a third-party backup, a completely independent copy of your data, which is not connected to the systems that can potentially be compromised. It's not enough to have files on the computer and in OneDrive. Both can be hit at the same time.

And the most important: Check regularly that your backup is actually running. There are companies that first find out that the backup hasn't run for 14 days, on the day they need it.

Most backup solutions can themselves check that the backup file is generated correctly and scan for errors, and send a notification if there's something you need to follow up on. And then it's also important that you periodically check that a backup can actually be reloaded. Unfortunately not very many companies do that, but it's a really good idea.

## 6. Lay down an incident response plan

What do you do when things go wrong? It's a question most small and medium-sized businesses haven't answered in advance.

Large companies have incident response plans with detailed procedures for who does what and in what order. They have rehearsed scenarios and have templates ready to inform customers and authorities. When a security incident occurs, they start a point plan.

Most small and medium-sized businesses don't have a plan. And when it happens, things move fast, and you end up making important decisions under pressure, that you would ideally have made calmly.

There needs to be communication internally and externally, and it needs to be investigated what has happened, and the first 24 hours often pass with finding out what at all has happened. Time runs.

If you don't get a full incident response plan done, then at a minimum have a plan for this in place:

Stop the disaster. The first thing you need to do is stop what's in progress. That can mean deactivating compromised accounts or closing access to specific systems.

Have someone you can call. Make sure to have a security advisor or IT partner you can contact right away. A person who can help you keep a cool head and lay down a plan for the next 30 minutes.

Know your notification obligations. With GDPR you must inform your data protection authority within a certain number of hours and the affected individuals without undue delay. Know who to contact, and what to report.

It is better to have a simple plan than no plan. Set aside three hours to think through the most likely scenarios: What do we do in a ransomware attack? What do we do if an email account is compromised? What do we do in a data leak? You don't need to cover everything, but you need to have thought through the most obvious situations before they occur.

## 7. Make updates mandatory

Updates to Windows just need to run. It's part of basic security hygiene, and it should be a fixed part of practice for all employees.

Microsoft releases security updates continuously, and they should be installed as soon as they are available. It should be managed centrally with Microsoft Intune, which is included in most Microsoft 365 license packages. With Intune you can ensure that all the company's devices get the updates, without it depending on whether each employee remembers to press "update now".

## 8. Mobile devices

The phone has become the center of our digital life, and it has also become an important part of access to the company's systems. It's used for multi-factor authentication, for Teams calls, to read emails and approve payments.

That raises the question: Who controls the phone?

There are three approaches:

- Company phone with full management, where the company owns and controls the device completely. That gives the most control, but it's also the most intrusive for the employee.

- Private phone without management, where the employee uses their own phone for everything, and the company has no control. That's the most risky solution.
- The third path, which more and more companies choose, is to manage the company's apps on the employee's private phone. With Intune you can separate company data from private data on the same device. The employee retains full control of their private apps, photos, and accounts. But the company's apps (email, files, Teams) are downloaded through a company portal and live in a protected layer.

Data cannot be copied out of company apps. You cannot take screenshots of the Outlook app. And if the phone is stolen, the company can remotely wipe company data without touching the employee's private content.

When an employee leaves, company apps are deleted centrally, and all company data disappears. The employee can keep their phone with all private data intact.

It's a solution that respects the employee's privacy and at the same time protects the company's data. It requires a certain setup, but with Intune it's manageable.

## 9. Working from home and VPN

When employees work from home or from an airport, a conference, or a café, they use an internet connection that the company does not control.

That's a problem. At the employee's home, the router may be outdated and without security updates. In an airport there may be someone sitting who has set up a fake Wi-Fi network with the same name as the airport's official network. Everything you send and receive then passes through the attacker's computer.

The solution is VPN, which is an encrypted tunnel between the employee's device and the company's network. With a VPN, everything is encrypted.

VPN has existed for a long time, but there was a period when many companies moved away from it, because it was inconvenient for users. That's about to change. Partly because the threat picture is sharper, and partly because the alternative, that the company should secure the employee's private internet connection, is impractical and crosses boundaries.

It's easier to encrypt the traffic with a VPN than to manage which router an employee has at home.

If your company has employees who work outside the office, then you should have a VPN solution in place, and the employees need to know they should use it.

## 10. Antivirus

Antivirus is today so basic that it almost doesn't deserve its own section. Microsoft Defender is built into Windows and runs automatically. It scans files, is updated daily, and you don't need to install anything extra.

20 years ago, antivirus programs were a big thing, but today that functionality is part of the operating system. Make sure that Defender is turned on and updated, and use your energy on the other security areas that demand more of you.

## 11. Privileged Identity Management

A principle that is gaining ground is Privileged Identity Management. The idea is simple: Your administrative permissions are there, but they are not active.

In the old days, an IT administrator typically had two users: One for daily work and one with administrator permissions. With Privileged Identity Management you have only one user. Your administrative permissions sit on your profile, but they are turned off. When you need to perform an administrative task, for example change an environment in the Admin Center, you grant yourself temporary access, for example for two hours. When the task is performed, or the time expires, the permissions are automatically deactivated.

The advantage is that if your account is compromised, the attacker only has access to what a regular user can. The administrative permissions are not active and cannot be misused.

Privileged Identity Management requires an additional license from Microsoft and is therefore mostly used by medium-sized and large companies.

In any case, you as ERP manager should consider: How many people have administrative permissions to your environment, and are they active all the time? If the answer is yes, then that's a risk you should address.

The same applies to your vendors. Your ERP partner typically has access to your environment in order to support you. But that access should not be active all the time.

Ask your partner to use Privileged Identity Management or a similar mechanism, so their access is only active when they're actually working on your environment. It's not about distrust. It's about reducing the attack surface.

# 7. ROLES AND PERMISSIONS

Now we focus on the users, and you need to ensure both that they have access to the right data and functions, and that they have the prerequisites to perform their work effectively, and that they don't make mistakes because they have access to something they shouldn't touch.

There are four basic things you need to learn in this chapter:

- Roles determine which start page and which shortcuts the user encounters.
- Permission sets determine what the user can do in the system.
- Security Groups are the way you manage permissions in a structured and scalable manner.
- And controls like Change Log, Field Monitoring, and approval workflows give you the ability to monitor and manage what happens with data.

## Role Centers

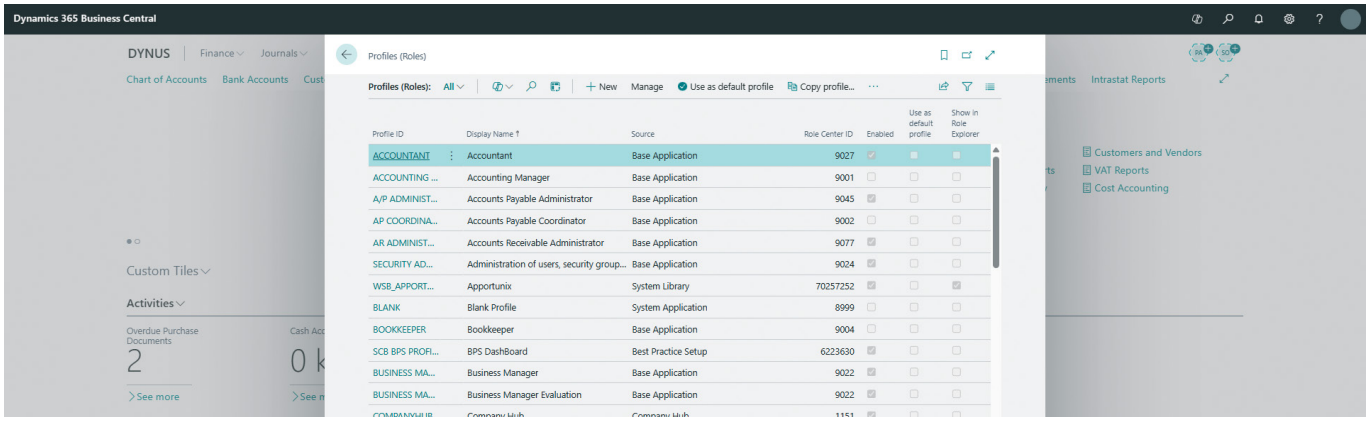
Role Centers are the system's start page, which helps each user get an overview and easy access to the most relevant functions.

There are too many users of Business Central who start with a random Role Center, and then they stay with it without thinking much about it.

But the Role Centers are built for specific roles, so it's best to use the correct Role Center, and even adapt it to one's work tasks. There are also many employees who wear multiple hats, and they can benefit from switching between Role Centers.

It's your responsibility as ERP manager to assign the Role Center to the user that is relevant for the person's work area.

Note however that the role does not determine what the user can do in the system, only what the user sees on their start page. If a user has super permissions, then the user can still search their way to all functions, even though the Role Center only shows shortcuts to a limited number of them.



Most companies use the standard Role Centers, and that works fine. Microsoft is quite good at making Role Centers that cover the typical roles. But as ERP manager, you should have an attitude on which Role Centers your employees should use. You can actually narrow the list of available Role Centers, so users can only choose between the selected Role Centers that make sense in your company. You do that under profiles in Business Central.

It's a good idea that you as ERP manager help users explore and adapt the Role Centers. If you get the functions and information that are important for a specific role in the company brought forward on the Role Center, then it helps the users in the role in question to make better use of Business Central.

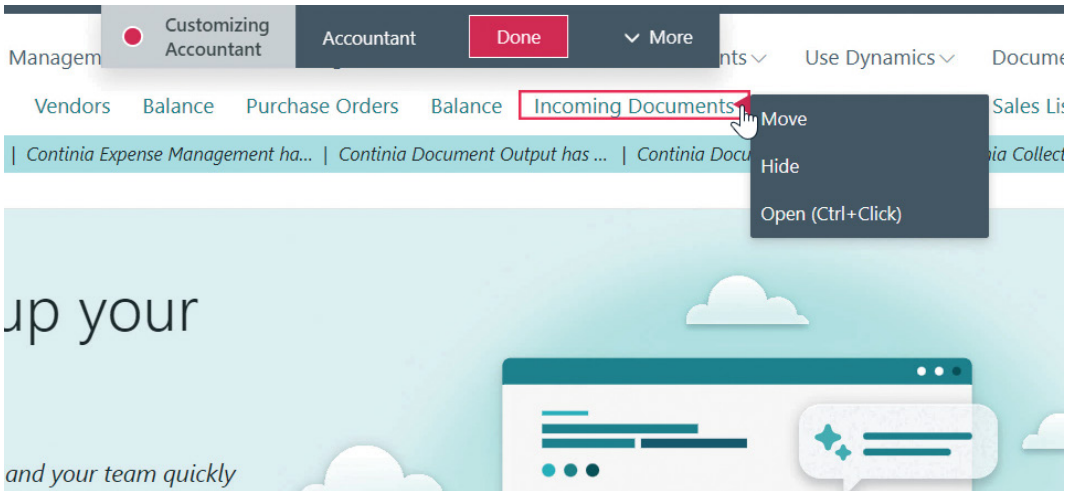
Users can themselves adapt their Role Center with personalization, and you as administrator can make profile customizations that apply to everyone in a specific role. And if you need something more far-reaching, there are apps that make it easy to build company-specific Role Centers with completely custom structure and layout.

## Profile customization

Business Central has many predefined profiles (roles), which cover everything from accountant to sales manager to warehouse employee.

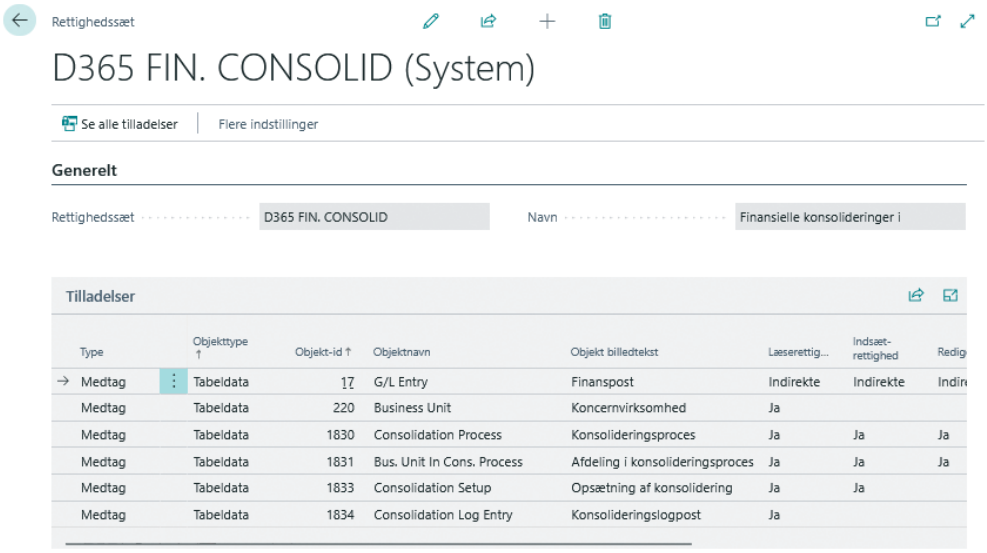
You can as administrator customize page layouts for a profile, so all users assigned to the profile in question see the customized pages. That's a different mechanism than personalization, which is individual and only affects the individual user. Profile customization affects everyone in the role.

You do that by choosing "Customize pages" from the profile card. Business Central opens in a customization mode, where you can move, hide, or add fields and actions, exactly as a user does with personalization, but with the difference that the changes apply to all users with that profile.



If you need a profile that resembles an existing one, but with customizations, you can copy a profile and change the copy. That is useful when you have multiple teams working in the same areas of Business Central, but in different ways.

If a user has made personal customizations that conflict with your profile customizations, you can clear the user's personalization from the profile card. It's also from here that you assign profiles to users.




## Permission sets

Permission sets are what determines what a user can actually do in Business Central. For each table in the system, you can decide whether the user may insert new records, read data, change existing records, or delete them.

Business Central is a large system with many functional areas, so it can quickly become extensive to manage access permissions for users. That unfortunately results in many granting all permissions to all users, thereby making them super-users with access to everything.

That's not a good way to handle the challenge. And everyone knows it. We experience time and again that companies are aware that it's not smart, but have taken the easy path.

Typically that happens when a new employee starts, and there isn't time to sit down and define permissions. Then someone says: "Just give her super." And then it never gets changed.

That tends to give problems when the auditors come on a visit. One of the first things an auditor asks about is: "Can you give me a list of all your super-users?" And if the answer is "it's all employees", then it gets embarrassing.

There are really many business questions to take a position on. Who may create a purchase order? Who may make a payment to a vendor? Who may edit a vendor's master data and bank information? The combination of the three is bad at any rate, but if a vendor employee should have the ability to perform all three things at different times, then permission sets need to be set up, but also business processes need to be introduced.

But we recommend that you have a pragmatic approach when you set up permissions. Is it dangerous that a user can see the exchange rates in the system? It probably isn't. Is it dangerous that a user can edit a vendor's bank information? Yes, and that should definitely be limited to selected employees.

Focus the effort on the data that is critical in the company, instead of trying to control each and every table.

## Predefined permission sets

Microsoft has made a number of standard permission sets that cover the most common roles. They are grouped by typical user roles and contain the necessary read, edit, insert, and delete permissions.

Use Microsoft's predefined permission sets as a foundation. That's a really good piece of advice. Avoid building your own permission sets from scratch, where you yourself choose table by table.

And why is that? Because every time Microsoft updates Business Central, they add new tables and pages, and they make sure to update their own predefined sets. If you have built your own permission sets manually, you don't have the new tables included.

We have seen the consequence in practice when companies choose to create their entirely own permission sets instead of using the predefined ones. When Business Central is updated, tables are missing in their sets, and no one can log in. You can just as well avoid that.

## Composite permission sets

In the old days, "user groups" were used in Business Central to gather users and permission sets under one. User groups are now phased out. They are replaced by two things: Security Groups, which are based on Microsoft Entra ID and used to group users and assign them permission sets collectively. And composite permission sets, which make it possible to build permission sets that include other permission sets.

You can, for example, create a composite permission set you call, for example, "Approver" and include the relevant Microsoft standard sets plus any extra permissions for, for example, Continia Document Capture, Expense Management, or other apps. In that way you get a kind of group, just built as a permission set that contains multiple permission sets.

The advantage is that when Microsoft updates their standard sets, the updates automatically follow into your composite set. You avoid sitting with an outdated permission set that lacks new tables.

One of the important possibilities with composite permission sets is that you can exclude permissions at the top level. That's different from the old Dynamics NAV solutions, where you could only give positive permissions. In Business Central you can say: "This user must not have access to G/L entries", and that exclusion takes effect regardless of how many permission sets are otherwise added.

Use the predefined permission sets as building blocks, which you gather in a composite permission set, and then exclude the critical areas that the users should not have access to.

## Test your permission sets

Setting up permissions is generally a trial-and-error process. No ERP manager has full insight into all corners of all employees' roles, and even experienced consultants cannot think through all scenarios the first time.

A good procedure is to make a draft permission set for each role, and then select one employee as a guinea pig. Remove "Super" from the user in question, add the new permission set, and let the employee test their daily workflow. When the person runs into something they don't have access to, they report it in, and the set is adjusted continuously.

It often happens that a role description doesn't catch everything. An order taker may also change reservations on the warehouse. A support employee may work in more modules than the ERP manager was aware of. You only find that out in the test.

The important thing is that you don't change permissions for all employees at once. Test with one user, get the set to work, and then roll it out to the rest of the group.

The task can be performed internally, if you have the desire to familiarize yourself with it. But many companies choose to get help from their ERP partner to make the first drafts, and then maintain them continuously themselves.

## Permissions Overview

In 2026, Microsoft introduced a new page called "Permissions Overview". It gives a centralized overview of all permission sets across installed apps and extensions.

With Permissions Overview you can, among other things, see which permission sets give access to a specific object, for example which sets allow

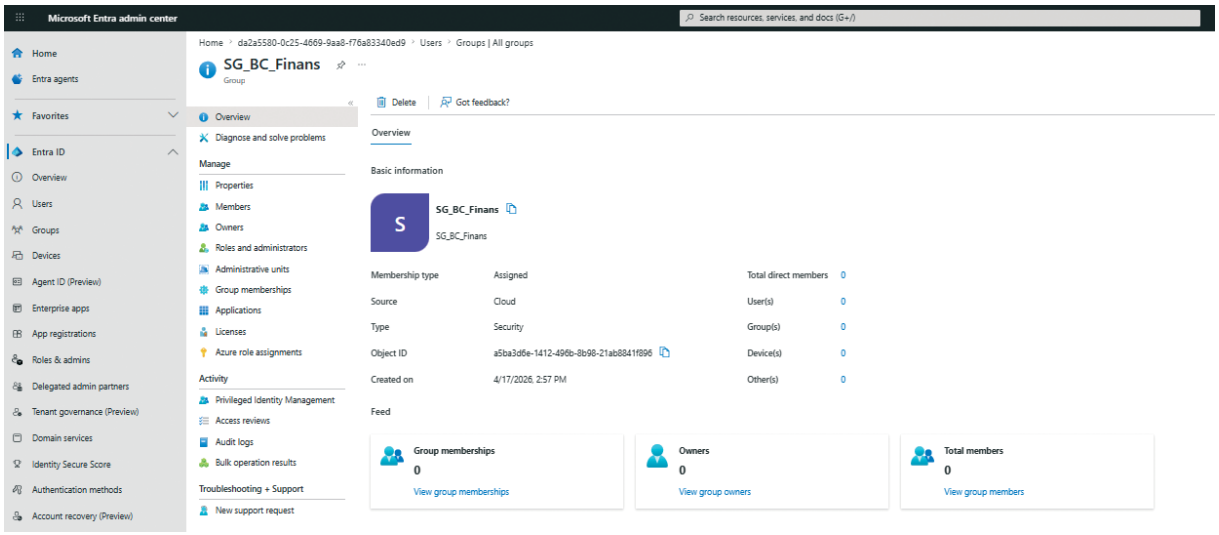
editing of customer data. The page also shows which Security Groups and users are linked to each permission set.

That makes it significantly easier to perform security audits, troubleshoot access problems, and document to the auditors who has access to what, without you needing to navigate around many different pages.

## Security Groups

Security Groups are the third part of the puzzle. With Security Groups you connect Microsoft's Entra ID (what was previously called Active Directory) together with permission sets in Business Central.

It's Microsoft's standard way to manage user access, not only in Business Central, but across the entire Microsoft platform. Previously, Business Central had its own system with user groups, but that has now been replaced by Security Groups in Entra ID, so Business Central follows the same model as the rest of your Microsoft infrastructure.




Entra ID is in short a catalog of all the company's users. You can access it via Microsoft 365 Admin Center. Technically, Entra ID and Microsoft 365 are two different portals, but you can administer users and groups in both places, and when we say "Entra ID" or "Microsoft 365", it is in practice the same user database we're talking about.

In Entra ID you create Security Groups, for example "BC Access Sales", "BC Warehouse" or "BC Approvers". In Business Central you link these groups to specific permission sets. When you add an employee to the Security Group in Entra ID, the person automatically gets the permissions that are linked to the group in Business Central.

## License assignment

It's important to understand that Security Groups manage assignment of permission sets in Business Central. They don't manage license assignment. That takes place in Entra ID or Microsoft 365 Admin Center.

If you create a Security Group for, for example, approvers and link a Team Member license to the group in Entra ID, the license is automatically assigned when a user is added. But these are two separate setups: The license comes from Entra ID. The permission sets come from Business Central.

In practice, IT and business work together on this. IT sets up the Security Groups and the license assignment in Entra ID. And the ERP manager links permission sets to the groups inside Business Central.

Be aware that the license type sets an upper limit on what the user can do, regardless of which permission sets you assign. A Team Member can never post, even if you assign them super-user permissions. That's limited by the license type. Read more about that in the chapter on licenses.

## Environment management

If you have multiple environments, for example one for each country, then you can use Security Groups to manage who has access to which environments. Make a group called, for example, "BC Country A", and add it to the environment for that country in the Admin Center. Then it's only members of that group who can log in to that Business Central.

That's a simple and effective way to keep a handle on access, when you have environments across countries or companies.

## License configuration

There is an important detail that many overlook. In Business Central there is a page called "License Configuration". It determines which default permissions are automatically assigned when a new user logs in for the first time.

If you choose to manage permission sets with Security Groups, then you should remove the default setup in the license configuration. Otherwise your users end up with two sources of permissions: those from the Security Group and those from the license configuration. That creates confusion and makes it hard to overview what a user actually has access to.

On a user card in Business Central you can see two sections: "Permissions" (which is assigned in the license configuration) and "Permissions from Security Group". Your users' total permissions are the sum of both. We recommend that you stick to Security Groups.

## It pays to spend time on it

Quite honestly, there are many companies that still don't have a handle on permissions. It's a bit like with the seat belt. You don't need it until things go wrong.

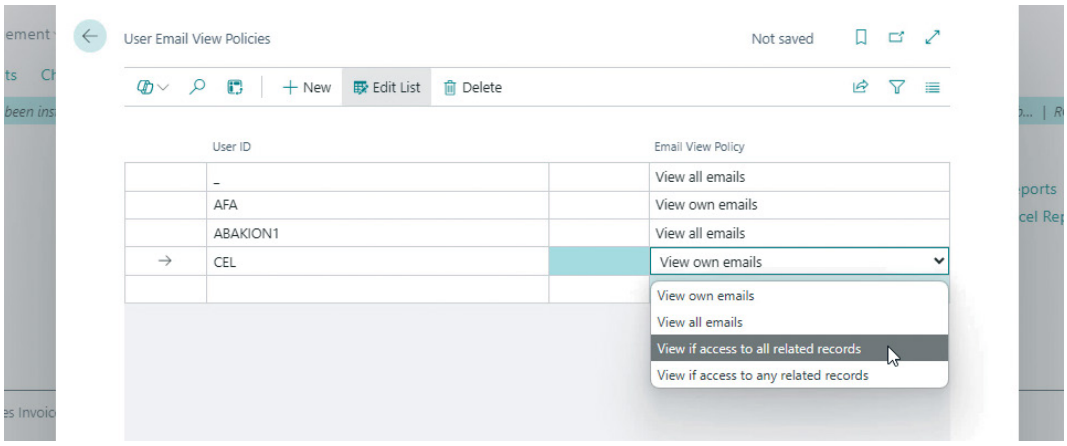
If you're still dragging your feet, then here come our final arguments for getting a handle on Security Groups and permission sets:

When the auditors ask, or an employee accidentally changes data she shouldn't have access to, then you as ERP manager are stuck with the problem.

When you have completed the setup work with Security Groups and permission sets, then it's easier to show the auditors that things are under control. You can simply open the Security Group and show the member list. And you typically only have one or two super-users: those who administer Business Central.

It's also an administrative gain in everyday life. New employees can be onboarded faster. There are fewer "can't you just give her super" situations. And you have a clear structure that everyone can understand and follow.

So there are no more good excuses. And now we need to move on.




## Access to others' data and history

Even if a user has access to an area, it's not certain that the person should be able to see all data in that area.

- A salesperson of course has access to sales orders. But may they see all colleagues' sales orders, or only their own?
- An employee in the accounting department has access to sent emails from Business Central. But may they see the emails that colleagues in other departments have sent?
- And in an approver portal such as Continia Document Capture, may an approver see the entire archive of previous purchase documents, or only the documents they have approved themselves?

These are questions that permission sets don't answer. Permission sets decide whether you technically have access. Access policies decide whether you can see others' records within the area you already have access to.

Emails are a good example. The sent emails sit in Business Central, and you as ERP administrator can set up who may see which emails. You can for each user choose whether the person only sees their own emails, sees all emails, or sees others' emails conditional on whether the user has access to the related records, for example both the invoice and the customer.

If you don't specify a policy for a user, Business Central uses the default "View if access to all related records". That means users can by default see each other's emails. That's worth knowing, because that may not be the setting you want.

You should make the same consideration for all the areas where users can see historical data.

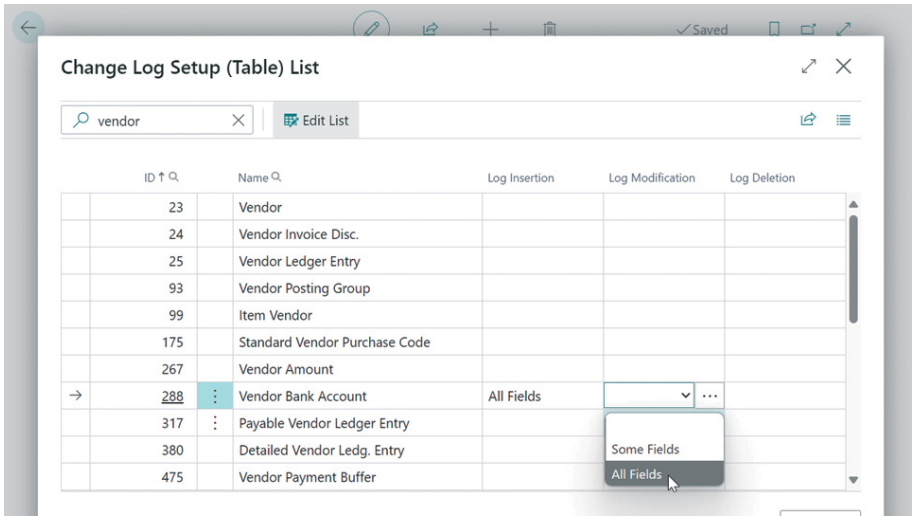
As ERP manager, you should go through the areas where history and others' data are accessible, and take a position on what is appropriate in your company.

We also need to talk about two other tools that you as ERP administrator need to supplement the access permissions with, so you can manage the business processes, and that's "Change Logs" and "approval workflows".

## Change Log and Field Monitoring

As ERP manager, you can activate "Change Log" in Business Central. If you set up Change Log for changes to bank information on vendors, then Business Central will log all changes, so you can reactively see exactly who has corrected in a vendor's bank account.

Most auditors expect you to have Change Log activated on bank information, but it can also be applied to many other areas.



There is no security in a Change Log. It's only history.

You can use Change Logs to document breaches of business processes, but you can also use Change Logs to find the causes of problems, for example when someone has corrected data in good faith, but it turns out to have an unintended consequence somewhere else.

Change Logs are reactive control. It's backward-looking.

Business Central actually has two separate monitoring functions that it's important not to confuse:

- Change Log logs changes at the table level. You choose which tables and fields should be monitored, and Business Central registers who changed what and when. Change Log is well suited for broad monitoring of master data such as customers, vendors, items, and setup tables.
- Field Monitoring is a newer function that is targeted at sensitive fields. Here you can mark specific fields, for example a vendor's IBAN number or the company's bank account information, and get an email notification immediately when someone changes the value. Field Monitoring is more focused and proactive: Instead of you having to go through a log, you get notified right away.

Logs and monitoring are very useful, but make sure to only monitor what you need.

Use it on the critical areas such as payment information and cost prices, but you should not log all postings. That puts Business Central to double work, and it creates a lot of data in your database.

And then you also need to consider your retention policy for logs, that is, how long is it relevant to store the changes that have been made?

Maybe you want to see changes in payment information many years back, but as regards order confirmations, you don't need to store a log for a particularly long time, because you just need to be able to find the cause of something that has gone wrong recently. Consider what you want to use each log for.

## Approval workflows

Logs and monitoring are reactive controls, and if you want to proactively avoid unwanted data changes, then you need to set up an approval workflow.

It's a process where a change requires that one or more employees approve the change.

It's important to know that Business Central has two separate workflow systems that can be used for approvals:

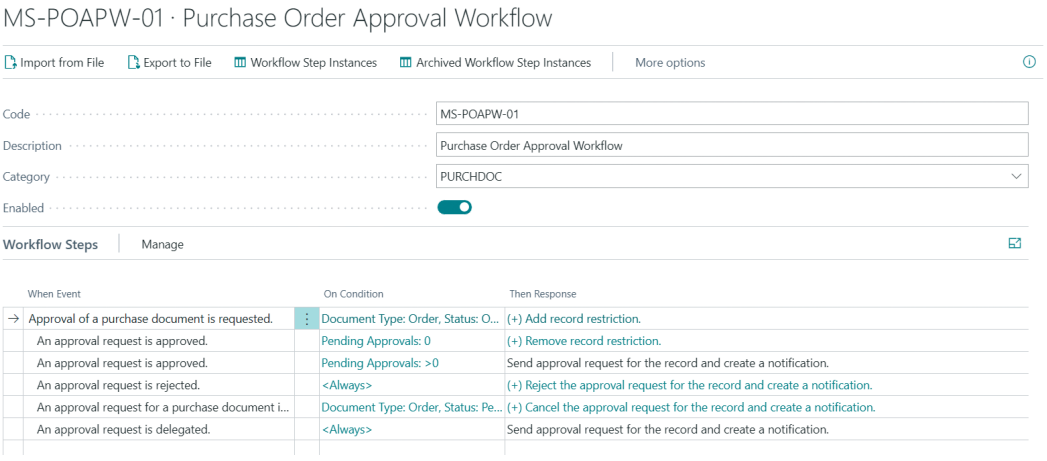
- The first is the built-in approval workflows in Business Central. Here you create workflows directly on the Workflow page in Business Central by choosing an event (for example “a purchase order is released”), a condition (for example “the amount exceeds 10,000”), and an action (for example “send approval request to manager”). Business Central provides a number of templates you can copy and adapt.

- The second is Power Automate, which is Microsoft’s no-code/low-code process tool. Power Automate can be connected to Business Central via a connector, and as a tool it contains a lot of functionality such as notifications in Teams and Outlook and integration with other systems.

The two systems can supplement each other: Any approval flow you create in Power Automate is automatically added to the list of workflows in Business Central. You can use the built-in workflows for simple, standardized approvals and Power Automate for more advanced scenarios involving multiple systems or more flexible notifications.

You probably already have access to Power Automate via your Microsoft 365 license, and it’s obvious to build all kinds of approval flows there, especially if you need approvals that go beyond the standard events that Business Central’s built-in workflows support.

As ERP administrator, you should consider which areas it is relevant to apply approval workflows to. It’s not only about securing the company against fraud. It’s also about ensuring data quality, ensuring that business processes are followed, avoiding errors that result in manual cleanups of data, and creating credibility in the company around the business processes.



# 8. LICENSES & SUBSCRIPTIONS

Most companies relate to licenses and subscriptions when they acquire Business Central, and then they don't revisit it again. They buy an additional user when someone asks for it, and the subscription is automatically renewed every year, but no one keeps an eye on whether the whole still makes sense.

That's a shame, because there is often money to save. And with the Cloud licenses there are far more possibilities than in the old days, when you bought a pool of licenses and paid a fixed subscription. Today you can lock in your licenses for several years, adjust up and down, bundle across Microsoft's products, and take advantage of campaigns that pop up at regular intervals.

But it requires that someone gives it attention. And that "someone" is you as ERP manager.

You don't need to be a license expert. It's an area where even consultants in the industry often furrow their brows, because there are many rules, and Microsoft changes them faster than most can keep up. But you need to get your partner to advise you.

Licenses and subscriptions are not something you handle once and for all.

## Know the license types

You need to know the license types in Business Central, so you can ensure that all employees have the right license.

Essentials is the standard license for users who work with finance, sales, purchasing, inventory management, and projects. It's the most widely used license type, and it covers the needs of by far most users.

Premium contains everything from Essentials and adds the modules for Manufacturing and Service Management. Within one environment, all full users must be of the same type, either Essentials or Premium. If two out of twenty users need manufacturing, then all 20 need to be Premium. But if you have multiple environments with Business Central, you can choose to run Premium in one and Essentials in the other. You just can't combine in the same environment.

Team Members is a cheaper license for employees who don't need full access. A Team Member can read data, update existing records, approve in approval workflows, and create quotes, but cannot, for example, post.

Device is a license that is not assigned to a named person, but to a device. It's relevant if you have a scanner in the warehouse or a computer in the production hall that many employees share.

All licenses are named, except Device. You cannot share a full user license between two people. If an employee leaves the company, you can transfer the license to a new employee, but two people cannot use it at the same time.

## Subscription terms and commitment periods

Business Central is sold as a subscription, and you can choose between different commitment periods. The choice is about balancing price against flexibility.

A monthly subscription gives you the freedom to adjust up and down on short notice, but it typically costs approximately 20% more than an annual subscription. The annual subscription is the most widespread: you commit for 12 months and get a lower price. There are also multi-year subscriptions, typically 36 months, which lock in the price and protect you against future price increases.

You can regulate the number of users continuously, but you need to do so within the cancellation period that appears in your subscription terms. Your partner needs to help you with that.

Today you can buy from several different partners at the same time. That can mean that you have Business Central licenses at one partner, some extra users at another, and maybe an app from a third. That gives flexibility, but it can also become unmanageable.

We often see that companies have subscriptions with different renewal dates, bought from different partners, and that no one has a total overview. You need to create a possibility to evaluate the total picture.

## Do the licenses match the users' needs?

As ERP manager you know your business. You know how it works in sales, in finance, in the warehouse. And you have a good sense for who actually does what in Business Central. That gives you a good starting point for assessing whether the licenses fit the actual use.

Do you have licenses that are not assigned to any user at all? Then you're paying for something no one uses. Do you have full users who in reality only log in to approve a registration? Then you may be paying for an Essentials license, where a Team Member would be enough.

That is surprisingly normal. We experience companies that have five or ten licenses that they just renew every year, even though they're not assigned to a single employee. That's money disappearing out the window.

We recommend that at least once a year you perform a license review: Who uses what, and does it still make sense? If there are employees who have gotten new tasks, or if you've hired field employees who work differently than the office staff, then it could very well mean that a different license type is more appropriate.

## Attach licenses

The overview of the licenses becomes even more important if your company uses Business Central together with other Dynamics 365 products, for example Dynamics 365 Sales or Customer Service. Then we need to introduce you to Microsoft's attach license model. It can save you nice amounts.

When a user already has a "base license" (the most expensive Dynamics 365 product), you can add other Dynamics 365 products at a reduced price.

If you, for example, have Business Central Premium as a base license, you can add Sales Enterprise, Customer Service Enterprise, or Field Service at a reduced price for each product. So, ask your partner whether you're taking optimal advantage of attach licenses.

## Price changes

In November 2025, Microsoft raised the price of Business Central for the first time in 5 years, and now we naturally don't know whether there have been more price adjustments before you read this guide, but it doesn't happen that often that Microsoft raises prices.

Twice a year Microsoft also adjusts prices in relation to exchange rates, and that can naturally both raise and lower the prices.

You can choose to lock in the price in a commitment period with a multi-year subscription. If there's a price increase on the way, you can renew your subscription before the effective date and keep the old price for the rest of the commitment period. That's really smart.

## AI agents and Copilot

The Copilot features in Business Central are included in the regular Business Central license at no extra cost. But the AI agents, for example for sales orders and purchase orders, on the other hand consume credits, which you need to buy either as pay-as-you-go or via prepaid credit packages.

Artificial intelligence is still a new license area, and it changes all the time. It's hard to guess how AI agents will be licensed going forward. But it's a safe guess that you'll be paying for consumption, and that the price model will surely change often, because the technological development in the area moves fast.

## Governance

Many companies have no procedure for who may order new licenses, change subscriptions, or purchase additional functionality. The result is that licenses are bought ad-hoc, without anyone keeping track of the total economy. That doesn't work.

Your internal procedure of course shouldn't be too heavy, but you as ERP manager need to have an agreement in place about who has the mandate to order, and who needs to approve. And you need to make sure to keep the overview.

## Use your partner

You don't need to be a license expert yourself. This is an area where Microsoft's own documents are often written in a language that is hard to understand for anyone other than specialists.

But you need to know enough to set requirements. And you should at regular intervals get your partner to look through your arrangement and evaluate whether you still have the right licenses and subscriptions.

# 9. AUTOMATED PROCESSES

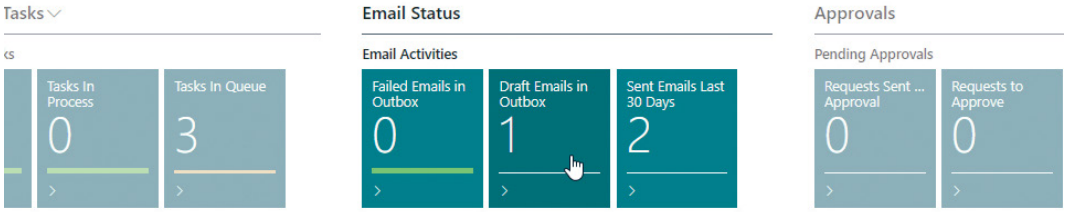
As ERP manager, you sometimes need to step into the engine room and inspect that all the machines are still running as they should, and maybe just lubricate, clean, top up, or just sweep the floor.

Business Central performs many tasks automatically in the background. Invoices are sent off, reports are generated, data is synchronized with other systems. When everything works, no one notices it. But when an automatic process fails, and no one notices, the consequences can grow hour by hour.

That's what this chapter is about: The automated processes and the monitoring of them.

## Automated jobs with Job Queues

In Business Central, you can automate tasks using Job Queues. A Job Queue is a scheduled task that runs automatically, either once or at a fixed frequency. You decide what should run, when it should run, and how often it should repeat.



The obvious example is invoice sending. If you post many sales invoices during a day, you don't want to wait for each individual invoice to be sent immediately. Instead, you just post, and a Job Queue picks up the invoices and sends them out later, for example in the evening when no one is sitting and working in the system.

Another everyday example is approval emails. If you use approval workflows in Business Central, then it's typically a Job Queue that sends notifications to the employees who have something to approve. If that Job Queue stops, then the approvers don't get notified, and the processes pile up.

You can also use Job Queues to generate reports. If you have an inventory valuation report that takes a long time to calculate, you can set up a job that generates the report on the first day of the month and delivers it to your inbox on the Role Center. You're spared sitting and waiting, and the report is ready when you arrive at work.

You need to plan with care, because Job Queues that run too frequently, or that perform heavy calculations while many users are logged on, can affect performance.

Consider whether heavy jobs can run outside working hours, for example at night or early in the morning. That reduces the risk of users experiencing delays, and it lessens the risk of lock conflicts in the database, where the job and a user try to update the same data at the same time.

In 2024, Microsoft fundamentally changed how the Job Queue functions. Now the queue functions as an actual queue, and jobs are processed in order (FIFO), and urgent jobs can be prioritized, so they move forward.

## Monitoring

Job Queues can fail, for example if an email address is missing for an email sending, or if a job needs to retrieve exchange rates from the central bank and for some reason can't get hold of them. Then Business Central will use outdated exchange rates.

In that case, Business Central will mark the job as faulty, and you can quickly see what the problem is, so it can be solved.

The problem is when no one is looking. Imagine that the Job Queue for invoice sending has stopped on a Monday, and no one notices it. By Friday you have five days of invoices that have never reached the customers. The payments are delayed, and you need to figure out which invoices are missing being sent.

Therefore it's a good idea to make it a fixed routine to check your Job Queues, almost like a machinist checking that everything is running as it should.

Put your operations check into a system. Introduce daily checks, weekly checks, and monthly checks. Then you know exactly how often each process

needs to be checked, and your colleagues can be sure that operations are running well, because you have it under control.

You can naturally also delegate some of the responsibility. The accounting department usually has the discipline to get regular checks performed. In other departments it may not come as easily.

Put it into a system. We may already have said this, but it's systematics that save you. Someone needs to have the task of checking the operational processes. And you need to have a plan for what should happen if a process has not run.

The cleanup task after a failure is almost always greater than the trouble of checking regularly.

To ensure that you quickly become aware of errors, you can set up notifications that alert you when a Job Queue fails. Business Central has a built-in notification feature that you can set up with a setup wizard called "Configure Job Queue Notifications". There you can choose who should be notified when a job fails. You can also connect the notifications to Power Automate, so you get an email or notification on your phone if something goes wrong in a Job Queue, even when you're not logged in to Business Central.

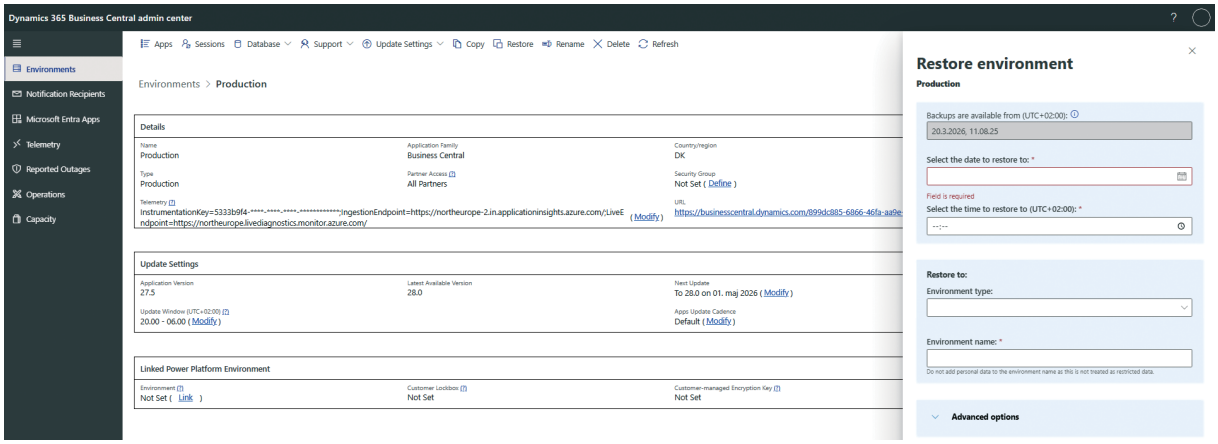
You can also have failing Job Queues displayed directly on your Role Center in Business Central, so you have the overview immediately when you log on in the morning. That requires you to use a Role Center that supports it, but it's a simple way to make the monitoring a natural part of your daily routine rather than something you actively have to remember.

# 10. DATA

We need to talk about data. As ERP manager, you are responsible for ensuring that data in Business Central is protected, well-organized, and available to those who need it. That sounds simple, but it's a task with many facets: backup, space, cleanup, compliance, data quality, and the ability to get data out of the system when you need to.

## Backup

It's in the Admin Center that you find your backups. Microsoft automatically takes backup of all your environments, both production and sandboxes, and stores them 28 days back in time. You don't need to do anything yourself to ensure that backup is taken. Microsoft handles that.




Via the Admin Center you can on your own perform a “restore” to any point in time within the 28 days. That gives you the ability to roll back to a point in time when you know the system was in order, if a problem arises with data, apps, or customizations. When you perform a restore, you actually create a new environment with the restored database. You cannot restore on top of the existing environment, because two environments cannot have the same name.

If you have accidentally deleted a sandbox environment, you can also restore it. In the Admin Center you find an overview of recently deleted environments, and from there you can recreate a deleted environment.

You should naturally only perform a restore if you know exactly what you’re doing and understand the consequences. You lose the work that has been performed since the point in time you restore to.

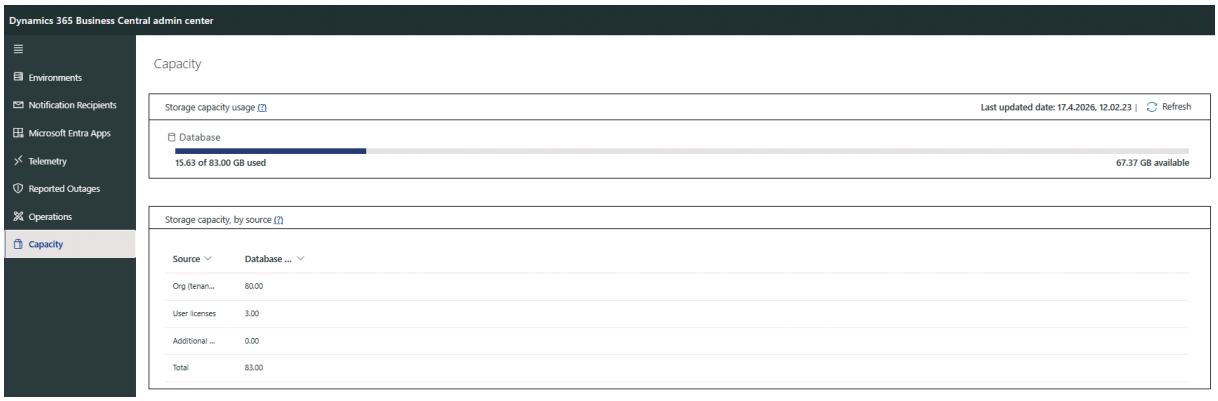
You can choose to have a professional figure out the consequences of a restore, but you can also take responsibility yourself. In any case, the initiative needs to come from you.

The backup we’re talking about here only covers Business Central. You also have emails and files that are important to protect, and therefore you or an IT-responsible person need to have a handle on backup for everything that is important for operations. There’s more about that in the section on security.

## Data volumes and monitoring of space consumption

One of your administrator tasks is to manage data and environments. You generally have 80 GB of storage available across all environments. In addition you get a supplementary quota per user (which at the time of writing is 3 GB per Essentials user, 5 GB per Premium user, and 1.5 GB per Device license), and the total result is that most companies have plenty of space.

It’s not the case that the system closes or becomes slower if you reach the limit. Your existing environments continue running undisturbed.




You will just be prevented from creating new environments or copying existing ones. But as ERP manager it's a good idea to have insight into what takes up space in the various environments.

In the Admin Center you have access to the Capacity page, where you can see how much space each environment uses, and how much of your total quota has been consumed. If you for example have multiple sandbox environments that you created for a test three months ago, and they just sit there unused, then they take up unnecessary space. You can delete them yourself in the Admin Center.

If you've made a copy of your operations company that takes up 5 GB, then the copy in the sandbox will also take up 5 GB. If you have many of those kinds of sandboxes lying around, then it takes up space.

Inside Business Central, you can use the Table Information page to see which tables take up the most space. If you have 8 companies, that's 8 times the item table, 8 times the customer table, and that page can be heavy to run. But it gives you an overview that's useful when you need to figure out where the space is going.

Table Information

Data Administration | More options

| Company Name | Table Name | Table No. | No. of Records | Record Size | Size (KB) ↓ | Data Size (KB) |
|---|---|---|---|---|---|---|
| Dynus | Item | 27 | 72 | 568,89 | 480 | 40 |
| 760 Subscription 10.23 cfa | Prod. Order Capacity Need | 5410 | 354 | 185,13 | 480 | 64 |
| LGJ 2023-09 Customs | Bin | 7354 | 1385 | 82,81 | 472 | 112 |
| GMDS DSC SUB | Bin | 7354 | 1384 | 82,87 | 472 | 112 |
| GMDS DSC MASTER | Bin | 7354 | 1384 | 82,87 | 472 | 112 |
| Dynus – Webshop UAT | Bin | 7354 | 1385 | 82,81 | 472 | 112 |
| 660 Duty reporting CFA | Bin | 7354 | 1384 | 82,87 | 472 | 112 |
| DYNUS_AFA_IC_SALES_2024-1... | Translation | 3712 | 2229 | 117,61 | 464 | 256 |
| Dynus Supply | SCB MDI On Documents | 6223230 | 3391 | 99,05 | 464 | 328 |
| DYNUS AFA 2024-07-24 | Translation | 3712 | 2193 | 123,27 | 464 | 264 |
| Dynus – Webshop UAT | Sales Line | 37 | 256 | 384,00 | 464 | 96 |
| Dynus | Customer | 18 | 30 | 1.365,33 | 464 | 40 |
| SLO Dynus | Warehouse Entry | 7312 | 1289 | 114,40 | 456 | 144 |

A typical place where data piles up is Tenant Media. That's where Business Central stores attachments, images, and PDFs. If you send many emails with invoices as PDF attachments, that can take up surprisingly much over time.

It's not only Business Central's own data that takes up space. Your apps can also contribute to the space consumption. If you for example use an app for scanning purchase invoices, it may store all scanned PDFs directly in the database. At companies with many incoming invoices, that can take up quite a lot. Some apps give you the ability to move that kind of data out to external storage, for example Azure Blob Storage, and that can be a good place to start if you want to save on space.

Also consider whether images and documents stored in Business Central can be moved to an external platform like SharePoint to reduce space consumption.

As ERP manager, you yourself need to take the initiative to clean up data and keep an eye on what takes up too much space. Your ERP partner probably doesn't do that on their own, unless you've agreed that they have the task.

## Data retention policy

In addition to the checks you can manually perform, it's a good idea that you have a retention policy that handles data that is no longer necessary.

Business Central stores a lot of data, but not everything needs to be stored forever. Some is necessary for the system to function correctly. Other is necessary to comply with legislation. But there are many areas where you as ERP manager can establish a retention policy. That could for example be sent emails, archived purchase orders, archived sales orders, change log entries, and Job Queue log entries.

Business Central has a feature for retention policies that makes it possible to set up rules for automatic deletion. You choose a table, define a retention period, and Business Central creates a Job Queue that automatically deletes the records that have exceeded the period. You can also add filters, so only specific records in a table are affected by the policy.

You should have an attitude on how long you want to store different types of records and documents. You can, for example, set up a policy that sent emails are stored for half a year, that Job Queue log entries are deleted after a month, and that change log entries are stored for a year.

Be aware that retention policies by default only cover a specific list of tables that Microsoft has made available. If you want to create a retention policy on tables from apps or self-developed functionality, then it requires a developer to add the tables.

A good example is that purchase orders that are fully received and fully invoiced still sit open in the system. When you post the invoice, Business Central does not delete the open purchase order. Then you have a purchase order sitting there that no one needs, but that takes up space in your lists

and potentially confuses planning runs. You shouldn't delete those manually. You need to set up a Job Queue that performs the cleanup.

We recommend that the Job Queue cleans up continuously, so it can take the deletions in small bites. If Business Central has to evaluate years of data at once, then it feels a bit overburdened.

Be aware that rules for deletion of G/L entries are managed under the setup of Finance, where it can be date-controlled. Most jurisdictions have legal requirements to retain accounting data for a number of years, so you need to know what applies in the countries where you operate.

## GDPR

As ERP manager, you need to relate to whether your company handles personally identifiable data in Business Central, and whether you do so in accordance with the law.

Let's start by distinguishing between two concepts. Personal data is information that can identify a person: name, address, email, phone number. Sensitive personal data is a narrower category that requires special protection: information about health, union membership, religion, sexual orientation, and the like. Both types are subject to GDPR, but sensitive personal data sets stricter requirements for how you handle and store them.

The responsibility is yours. Your company is the data controller, and Microsoft is the data processor. Microsoft ensures that data is stored securely and encrypted in their data centers, but they take no responsibility for how you use data in your solution. Your ERP partner can help with the setup, but it's you who needs to know the rules and define the needs.

### Map your personal data

The first step is to find out whether you have sensitive personal data in Business Central, and where they are located. National ID numbers are the obvious example. They may sit on employee cards, but actually also on customer cards. Bank information, contact data, addresses, and health information can also be relevant.

The employee card deserves special attention. Business Central has, for example, a field for union membership, and that's sensitive personal data. If you use the project module and get time registrations in with absence reasons, then you can quickly end up having information about employees' illness, children, and other private matters lying in the system. Data that comes from external systems via integrations also deserves a critical look, because it's not always clear what is being imported, and description fields can contain more than you bargained for.

Think broader than master data. When you post documents with personal information, then that information sits in the posted document, and all users who have access to posted documents can potentially see it.

Also think of free-text fields. Comment fields on customers, contacts, and vendors can contain anything. If your salespeople use Business Central as a kind of CRM system and write notes about contacts at customers, then personal information can quickly accumulate that you should have an attitude on.

## Classify the sensitivity

Business Central has a tool for classification of data, where you can classify fields by sensitivity: Sensitive, Personal, Confidential, or Normal.

That classification forms the basis for your further handling of GDPR in the system. Microsoft makes the tool available to make your administration easier, but it's your responsibility to classify correctly.

## Manage access

When you know where your personal data is located, you need to ensure that only the right users have access. You do that via Security Groups. They are the same Security Groups we talk about in the chapter on roles and permissions. In Entra ID you define which groups a user belongs to, and in Business Central you link permission sets to the groups.

Permission sets manage access to objects such as tables, pages, and reports, not to individual fields in a record. There is no functionality to ensure that a user may see a record but not specific fields in it (for example a national ID number).

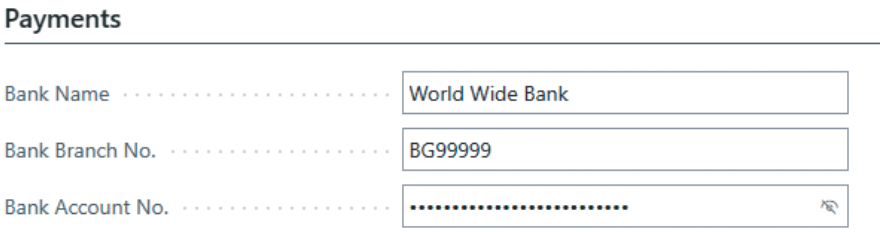
If you hide a field on a page, then it's only a user-interface customization. Users with permissions to personalization can themselves add the field again.

That means you can easily limit which tables, pages, and reports a user may see, but the limitations work on entire tables, pages, and reports, not at the field level.

If you have a need for data-dependent permissions, then have a talk with your ERP partner about how it should be solved in your scenario.

## Masking and monitoring

From 2025, Business Central has had a masking function that can hide values in text fields, so they are only shown when the user actively clicks on a show icon. It's a light protection against "shoulder-snooping" in open office environments, but it does not replace access management, since data is still accessible in the system.



You should also set up Field Monitoring on critical fields such as national ID numbers and bank information. Field Monitoring sends an email to a responsible person every time someone changes a monitored value. It's a good supplement to Change Log, because you get notified right away instead of only discovering the change the next time you look in the log. You can also read more about that in the chapter Roles and Permissions.

### Subject access requests

GDPR gives individuals the right to obtain insight into, have corrected, have deleted, and have restricted the processing of their personal data. Business Central has a Data Privacy tab in the Role Center for user administration where you can handle that type of request, but it of course presupposes that you have classified your data correctly.

### What can you do yourself?

Classification, basic access management, and handling of subject access requests can to a large degree be handled by yourself in Business Central.

If, on the other hand, you want to manage display of data based on content or ensure that personal data does not appear in views, printouts, and reports, then you need to have a talk with your ERP partner.

The most important is that you as ERP manager take the initiative. Find out which personal data you have, and ensure that they are classified and protected. Your ERP partner can help with the setup, but you yourself have the responsibility.

## Data quality of master data

Do you as ERP manager also take responsibility for the quality of data in Business Central?

It's at any rate an important task to ensure that master data in Business Central is correct. Regardless of whether you or someone else has the role. As ERP manager you need to have a handle on who is responsible for which master data in your organization. It's always a bit larger task than one immediately thinks.

Which data should be registered on an item, and in what form? What should a customer card contain in terms of data, in order for invoicing to be possible, or for a Power BI report to be accurate?

It's bad enough if colleagues don't trust data in ERP or in the reporting. But it can also lead to incorrect decisions if master data is not in order. You have caps categorized as clothing and t-shirts as accessories, and you can see that you earn good money on clothing, and therefore you have the desire to scale up t-shirts. But that would be a mistake, because the data is incorrect.

In many companies, you cannot agree on what the cost price of an item is, because everyone pulls data and calculates in their own way. We've met

companies where you can't even agree on what the item number of an item is.

A simple grip that can help is to use templates. Business Central has templates for creation of, for example, items, customers, and vendors. If you set up item templates with the right default values, categories, and posting groups, then you ensure that new items are created uniformly. As ERP manager you should have an attitude on which templates should be used, and who may create and edit them. It's a low-practical tool, but it makes a big difference for data quality over time.

You should also consider whether there should be an approval workflow on creation of master data. Should a newly created vendor be approved before it can be used? That's a question you as ERP manager need to take a position on, and we talk about it in the chapter on roles and permissions.

If you have many companies, it's especially important with data discipline to ensure that master data stays synchronized across companies.

Data quality is also about the quality of the data you receive via integrations from external systems. That's one of the reasons we see so many challenges with item numbers and unique IDs in companies that have multiple systems. If you get data in from other systems, then you need to have an attitude on who owns the data standard, and how you ensure the quality of data.

Master Data Management is a discipline in itself. It requires both well-defined work processes and frequent checks. Few companies have a dedicated Master Data Manager, but all need someone who has the responsibility for the role.

Agreement on what good data quality is does not arise by itself. It needs to be harmonized and managed.

When there is no standard for how data should be created, then it gets created in many different ways. And then you have a problem that grows for every day that passes.

## Data export and working with data in Excel

Business Central is not a closed box. You can get data out of the system in several ways, and we'd like to highlight some smart possibilities.

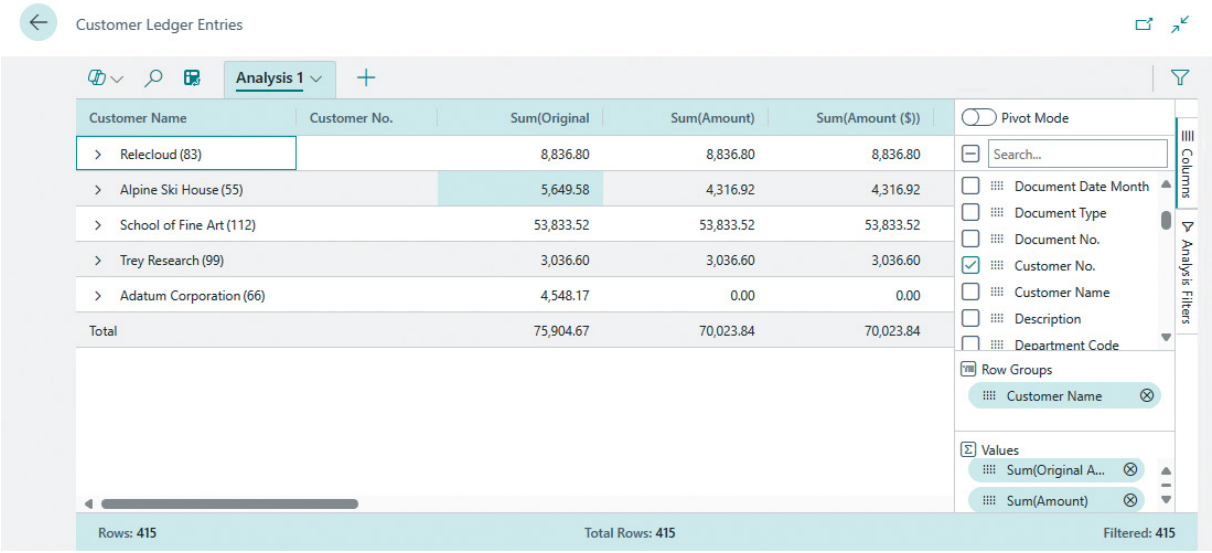
The Excel integration has become really smart. From most list pages in Business Central you can click on the Share icon and choose "Open in Excel" or "Edit in Excel". With "Open in Excel" you get a read-only extract of the data you see on the screen. With "Edit in Excel" you can change data in Excel and send the changes back to Business Central.

It's surprisingly effective. If you for example need to update prices on 200 item lines, then it's far faster to do it in Excel than to enter it line by line in Business Central.

You can use formulas, copy data from other sources, and when you're done, you publish the changes back. For ERP managers with a past in Excel, it's a shortcut that saves many hours.

You can also subscribe to data, so you can continuously pull a specific dataset, for example all item ledger entries for a given period, and build Excel reports on top of that. Those reports you can save and share via Business Central's reporting layer, so colleagues have access to them directly from the Role Center.

In addition to Excel, you have the ability to manage your printouts and document layouts via Word and Excel. Previously, that kind of customization of reports typically required consultant help and many hours. Today you as ERP manager can come a long way yourself if you're familiar with Word and Excel.




## Analysis directly in Business Central

You don't always need to pull data out of Business Central to analyze it. The Analysis Mode feature gives you the ability to make pivot tables directly on list pages in Business Central.

You can group, filter, and sum data, and you can save your analyses, so you can quickly return to them. Copilot support has also come, which can help you build analyses. It's a feature we see used more and more.

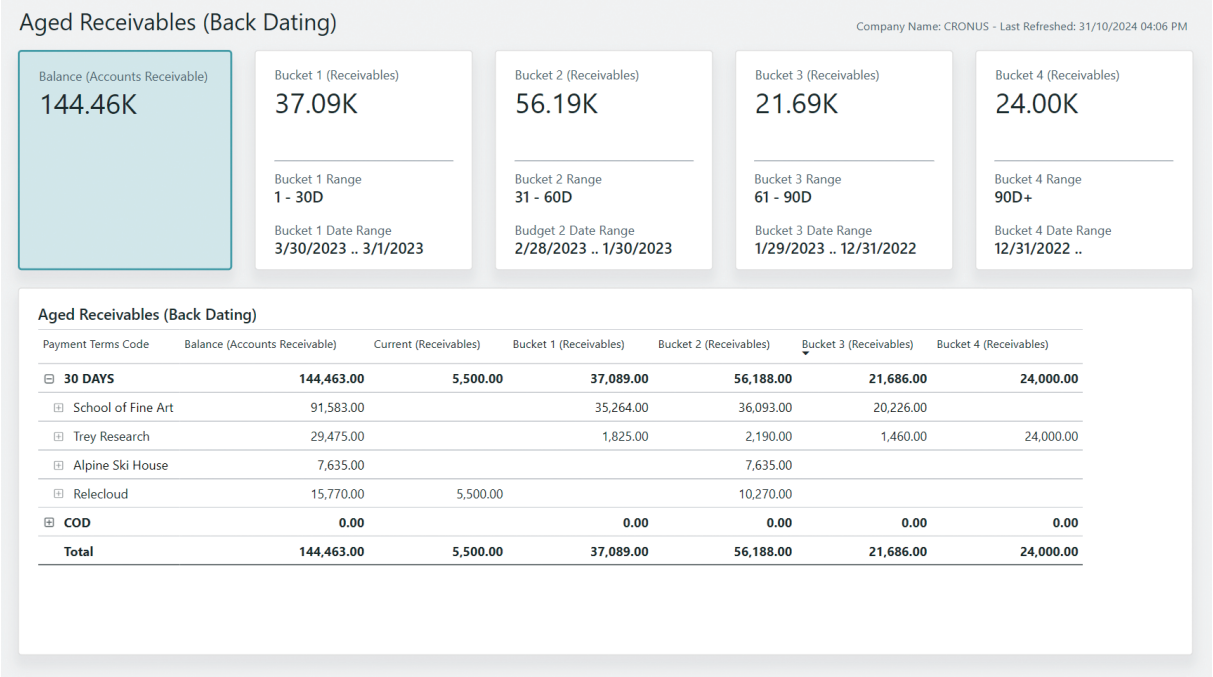
If you work with finance data, Business Central also has a feature called Financial Reporting. It was previously called account schedules, and it's a tool where you can build your own finance reports with rows and columns, and pull on G/L accounts, dimensions, and budgets. You can make quite advanced reports directly in Business Central, without needing external tools.

## Power BI

Microsoft has also launched a new generation of standard Power BI reports for Business Central, which cover finance, sales, purchasing, inventory, manufacturing, and projects. The reports are installed as Power BI apps, and much can be shown directly inside Business Central.

That means you can go far with analysis and reporting without investing in custom BI solutions.

But the interplay between Power BI and Business Central actually deserves its own guide, so we won't dive more into the details here. But you can confidently throw yourself out into it. There are good possibilities, and it has become much easier.




| Payment Terms Code | Balance (Accounts Receivable) | Current (Receivables) | Bucket 1 (Receivables) | Bucket 2 (Receivables) | Bucket 3 (Receivables) | Bucket 4 (Receivables) |
|---|---|---|---|---|---|---|
| **30 DAYS** | **144,463.00** | **5,500.00** | **37,089.00** | **56,188.00** | **21,686.00** | **24,000.00** |
| School of Fine Art | 91,583.00 | | 35,264.00 | 36,093.00 | 20,226.00 | |
| Trey Research | 29,475.00 | | 1,825.00 | 2,190.00 | 1,460.00 | 24,000.00 |
| Alpine Ski House | 7,635.00 | | | 7,635.00 | | |
| Relecloud | 15,770.00 | 5,500.00 | | 10,270.00 | | |
| **COD** | **0.00** | | **0.00** | **0.00** | **0.00** | **0.00** |
| **Total** | **144,463.00** | **5,500.00** | **37,089.00** | **56,188.00** | **21,686.00** | **24,000.00** |

# 11. PERFORMANCE OPTIMIZATION

Performance is about the users' experience of how quickly Business Central reacts and performs processes. Today, performance has nothing to do with the hardware, because Microsoft handles server capacity, databases, and infrastructure in large data centers, and they automatically scale resources such as memory, CPU, and database capacity as needed.

Optimization of performance is therefore about something different today. And it's important to understand what actually makes your solution fast or slow, because it's rarely what one thinks.

## What can make Business Central slow?

When a company calls their ERP partner and says “everything runs slowly”, then the troubleshooting starts with looking into the solution.

The first thing you look at is the database capacity. Based on the standard capacity that comes with your subscription, you can quickly see whether the database is under pressure. The next step is to check whether something significant has happened with the data volumes in the last 30 days. Are there jobs that have pumped large amounts of data down into specific tables? Are there tables that have grown unusually much?

Already in the initial investigation you usually find the culprit, before you even start pulling telemetry data. It can be a Job Queue that runs too often and burdens the system in the middle of working hours. It can be a change log that logs too broadly and generates enormous data volumes. It can be an app that performs heavy calculations on a page you use many times a day.

The point is that it’s rarely the solution platform itself that’s the bottleneck. It’s typically something in the specific setup, in the data volumes, or in the apps that are installed. But that also means it can be solved.

## Updates and performance

Every time Microsoft releases a major release, there are many thousands of companies that want to be upgraded within a short time. That naturally creates some traffic and data load in those periods, and it can give short-term performance fluctuations. If you experience that the system is a bit sluggish in the days around a major update, then it’s probably transient.

But if you experience longer-lasting challenges, it’s with great probability not the update that’s the problem.

## AI agents and performance

A question that’s coming up more and more is whether AI agents in Business Central can affect performance. AI agents work fast, and many of them can work at the same time, and the question is whether that burdens the system.

AI agents technically work as regular users. They place the same type of load on the system that any other user would.

There is a theoretical possibility that many simultaneous agents can pressure the system, but it’s no different than if it were many simultaneous human users. Microsoft has, moreover, introduced limits for how many agent processes can be executed in parallel, so the agents never push out the real users’ performance. So it’s not something Microsoft is worried about, and we have never experienced problems for that reason.

## The internet connection

Performance naturally also depends on your internet connection. Every time you do something in Business Central, the command travels to a Microsoft data center and back again.

If your internet connection is poor, you'll feel it clearly. But experience shows that most companies have sufficiently good connection that it's rarely the primary cause of performance problems. When you dig into the cases, it's most often about something in the solution itself.

## Optimization in Business Central

There are a number of things in the application itself that you can optimize.

When you open a page in Business Central, it doesn't load all data immediately, but only the data you can see. On a customer list, Business Central only loads the customers that are visible at the top, and when you scroll, it loads the next ones as it becomes necessary.

The more data that needs to be loaded, the longer it takes to get a page ready. If you have the fact box on the right side of the screen open, then the page takes longer to load, because Business Central needs to fetch more data. If you have performance challenges, then try closing the fact box. Also consider whether you can hide fields that you don't use anyway, because that also improves speed.

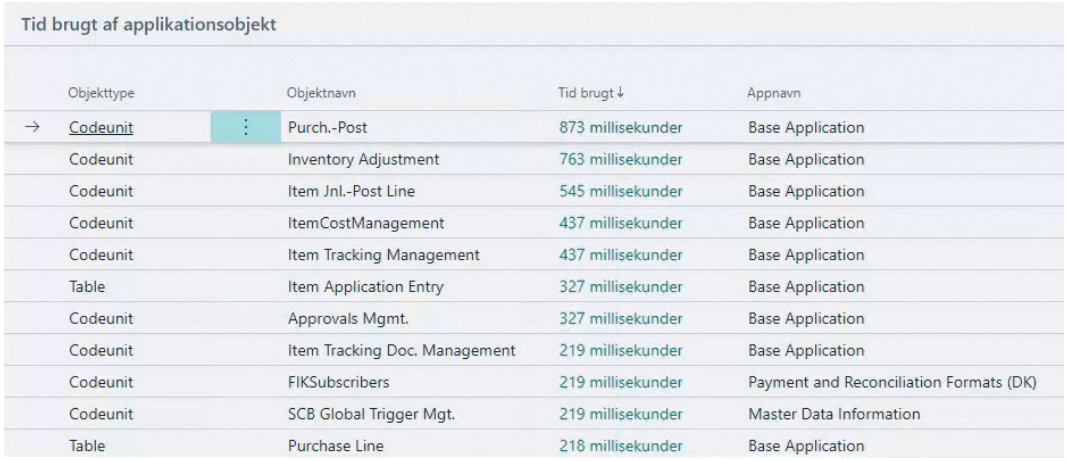
The same applies to the Role Centers. There are many key figures, and if you remove the elements that you don't use anyway, you save time. It may be that you save a quarter of a second, and that doesn't sound like much, but we've gotten used to systems responding instantly, so a quarter of a second can well make a difference.

Be aware of whether apps are installed on the pages where you experience challenges. You can easily see that under Page Inspection and the Extensions tab. Page Inspection shows, for example, how long each extension uses. That gives you concrete data to take to your app vendor, if you have a suspicion that a specific app is slowing down a page.

Job Queues that run too frequently can also affect performance, especially if they run heavy processes while many users are in the system. Microsoft recommends considering whether jobs can be moved outside working hours.

## Performance Profiler

In Business Central there is a Performance Profiler that you can use to identify what makes a process slow.



Tid brugt af applikationsobjekt

| Objekttype | Objektnavn | Tid brugt ↓ | Appnavn |
|---|---|---|---|
| → Codeunit ⋮ | Purch.-Post | 873 millisekunder | Base Application |
| Codeunit | Inventory Adjustment | 763 millisekunder | Base Application |
| Codeunit | Item Jnl.-Post Line | 545 millisekunder | Base Application |
| Codeunit | ItemCostManagement | 437 millisekunder | Base Application |
| Codeunit | Item Tracking Management | 437 millisekunder | Base Application |
| Table | Item Application Entry | 327 millisekunder | Base Application |
| Codeunit | Approvals Mgmt. | 327 millisekunder | Base Application |
| Codeunit | Item Tracking Doc. Management | 219 millisekunder | Base Application |
| Codeunit | FIKSubscribers | 219 millisekunder | Payment and Reconciliation Formats (DK) |
| Codeunit | SCB Global Trigger Mgt. | 219 millisekunder | Master Data Information |
| Table | Purchase Line | 218 millisekunder | Base Application |

You start the profiler, perform the process that is slow (for example post a sales order), and stop the profiler again. Then you can see an overview of which apps were active during the process, and how long they used. If it turns out that, for example, a specific app uses 10 seconds to process data, then you have concrete documentation to present to your app vendor.

## Telemetry

In addition to the Performance Profiler, you have the ability to connect your Business Central environment to Microsoft's telemetry platform. It requires an Azure subscription, but it gives you access to detailed data about what happens in your solution over time: slow SQL queries, long report runs, error patterns, and database locks.

It's probably your ERP partner who needs to set up and monitor telemetry data, but as ERP manager you should know that it exists and actively ask for it if you experience recurring performance problems.

Telemetry is not only for troubleshooting. It's also a proactive tool. If you establish a baseline for how your system normally performs, you can quickly notice when something deviates. A report that suddenly takes twice as long as normal is easier to react to when you have a basis for comparison.

## Reach out to the right people

Performance problems can have many causes, and it's important to know whom to contact.

If the problem appears to lie in a specific app, then contact the app vendor in question with data from the Performance Profiler or Page Inspection. If it's a general problem with your environment, then reach out to your ERP partner.

The most important is to avoid guesswork. Business Central today gives you good tools to measure and document where the problem lies.

# 12. PROCESS OPTIMIZATION AND CHANGE

At the start of this guide, we encouraged you to know your processes, your solution, and your mandate. If you have done that homework, then you have a good foundation to build further on: you know what runs well, and where there is friction. You need to use that insight proactively to optimize your business.

Process optimization is part of your responsibility, whether it's in your job description or not. It makes sense, because you are the person in the organization who has the best foundation for spotting optimization opportunities. You know the processes, you know the system, you know the users, and you know when someone is spending half an hour on something that the system could handle in ten seconds.

But you cannot lift the task alone. Process optimization requires backing from management. You need management to prioritize the effort and give you mandate to carry out changes, because without that backing you risk that good proposals stall, because no one has said yes to spending time and money on them.

## Reactive and proactive optimization

There are two ways to work with process optimization, and you need to take both on board.

- The reactive approach is that Microsoft releases a new release wave, and you spot a feature that can solve a need in the organization. Maybe a smarter way to handle bank postings has come, and you know that your colleague in finance spends a long time on it today.
- The proactive approach is harder, but also more valuable. You know that an employee spends disproportionately much time on a manual task, and you try to find a smart solution. Maybe you find an App on Microsoft Marketplace. Maybe Office or Power Platform tools can solve the task in cooperation with Business Central. Maybe an AI agent can take over part of the process.

The reactive approach requires that you follow what Microsoft is releasing. The proactive one requires that you know your employees' everyday life well enough to know where the shoe pinches, even if they don't ask for help themselves.

Both parts presuppose that you stay oriented on what Business Central can do. And Power Platform. And Copilot. And AI agents. You don't need to know everything yourself, but you need to know enough to be able to discover the possibilities.

You don't need to read all the release notes for Business Central from end to end, but you should follow new features in Feature Management, where you choose what to turn on. Look at that page regularly and systematically. There may be possibilities that fit perfectly with a problem you didn't know Microsoft had solved.

You also need to know the possibilities for automating and "agentifying" that you get with Power Apps, Power Automate, Copilot Studio, and other smart Microsoft tools.

And all the new possibilities are much easier to relate to when you have an overview of your own solution and your users' processes. With that knowledge as a foundation, you can quickly assess whether a new feature is relevant for you. Otherwise, the release notes are just a long list that's hard to prioritize.

## Targets

When you propose a process change, you should have an idea of what the gain should be. That may sound formal, but it doesn't need to be heavy. It can be as simple as: "We currently spend four hours a week on this task. With the new setup, we expect to halve the time consumption."

If you don't define the gain target in advance, then you can't afterwards prove that the target was reached. And without proof you only have a sense, and senses rarely convince a CFO that your projects create value.

The gains don't always need to be about time. It can be fewer errors, better data quality, faster invoicing, or shorter delivery times. But the gains need to be concrete enough that you can assess whether you've reached the goal.

It's also a good tool for yourself. If you want to show that your effort as ERP manager makes a difference, then documented gains are the strongest argument you can have.

## Testing and approval of process changes

When you change a work process that involves Business Central, then the change must be tested and approved before it's put into operation. That applies regardless of whether it's a new app, a new setup, or just a changed sequence in an existing process.

The technical aspects of sandbox environments and test procedures we've already covered in the chapter on update and test. Here it's about the change process: ensuring that the change makes sense in practice, that the affected employees are on board, and that there's a plan for when and how the change takes effect.

As ERP manager you are responsible for that plan. That doesn't mean you necessarily perform all the testing yourself, but you are the one who ensures

that there is a plan, that it is followed, and that the change is approved before it hits the production environment. If you let changes go into operation without a plan, you end up cleaning up afterwards, and that's always more expensive than testing in advance.

Also make sure that changes in processes are reflected in your documentation. If you have made that overview of processes and solution that we talked about at the start of this guide, then you have an overview of your processes and your solution. That overview loses its value if you don't update it when something changes.

## Change in the organization

The hardest part of process optimization has nothing to do with technology. It's about people. You can find the smartest solution in the world, but if the employees don't take it on board, then it's not worth anything. And you will encounter resistance. It's not a question of "if", but "when" and "from whom".

The most typical resistance sounds: "That's how we've always done it." It most often comes from employees who have been in the same role for many years and have developed routines that work for them. Asking them to change those routines can feel like a criticism of their work, and it's of course not, but it can be experienced that way.

And then there is a more existential fear. We live in a time where the media every week brings stories about companies cutting back on staff with reference to AI and automation. When you then come and say "process optimization", then it's not surprising that someone hears "savings" and thinks "layoff". You need to be aware of that.

The best approach is to let the employees who perform a process take ownership of the change. If you impose a new process on people from above, then you encounter resistance. If you instead invite them in and ask whether the new feature can make their workday easier, then you get teammates.

It requires that you present process optimization as a support tool. The purpose is to remove the manual handling and the trivial tasks, so the employees can use their time on what creates real value. Analysis, decisions, customer contact, all that which a machine cannot do as well as a human.

And the opposite argument is also worth bringing along: if the company doesn't optimize its processes, then it's less competitive tomorrow than it is today. That's not a choice you can postpone until the employees who are uncomfortable with change have switched jobs or have retired. The business needs it now.

But tread carefully. Change needs to be handled carefully.

Microsoft's own implementation guide references research showing that projects with a planned change strategy are six times more likely to reach

their goals than projects without. The figures are from implementation projects, but the principle also applies to ongoing process changes: if you don't think about how you communicate and involve, then you risk that a good change is never adopted.

Change management is a science in itself, because it's about the most complicated thing in the world: humans, and the goal is the hardest thing in the world: change.

Get help from experts to organize change. It pays off.

## Follow-up

And when the optimized process has run for some time, then follow up. Have you achieved the gain that you had set as a target?

If the result doesn't live up to expectation, then find out why. Maybe the setup was wrong, maybe the process wasn't followed, or maybe the gain was less than assumed. That knowledge makes you wiser for the next time you want to optimize a process.

# 13. PARTNER COLLABORATION

As ERP manager, you need to know what to expect from the collaboration with your ERP partner. And you need to know who has responsibility for what, because there are more parties at play than you may think.

## Who has the responsibility?

You actually have two partners when you use Business Central. There is Microsoft, who has developed the solution and maintains and updates it, and there is the delivery partner, who implements Business Central at your company and supports you in everyday life.

What can you hold them accountable for, and what do you need to pay for? That's good to know in advance.

Basically, you can say that:

- Microsoft is responsible for Business Central functioning and being available, but not necessarily that your customized version functions, and they are also not responsible for your processes functioning well in the solution, or that you get benefit from the solution.

Microsoft monitors that the server runs, that the solution runs on the server, and that your environments are available. They don't keep an eye on whether conflicts or errors arise, or whether it affects your data.

- The partner has responsibility for what you specifically have agreed they have responsibility for. If you haven't agreed on anything specific, then they actually only have ordinary product liability for the work they have performed.

  You cannot, for example, expect your partner to proactively react to an error arising in your environment, unless you have agreed with your partner that they have that task.

  Your ERP partner is a kind of link between you and Microsoft. Traditionally, ERP partners have been quite reactive, but fortunately that's changing. There are more and more ERP partners that offer proactive services and monitoring, and that's because it's important when you use Business Central in the Cloud edition.

## Partner access and control

Today you can have multiple partners associated with your Business Central at the same time. You can, for example, have one partner that administers your Microsoft 365 license, and another that takes care of Business Central. If you have environments in multiple countries, it can even be different partners that support each environment.

Microsoft has introduced GDAP (Granular Delegated Admin Privileges), which replaces the old model where partners got full administrator access to your entire tenant. With GDAP you give your partner a time-limited and role-based access that only covers the services the partner needs to administer. It follows a principle of least privilege, and you yourself approve the roles that the partner requests to get.

That means you as ERP manager have control over who has access to what. You can assign a partner access exclusively to Business Central without giving access to other services in your tenant. You can also manage partner access per environment, so one partner, for example, only has access to your production environment, while another has access to a sandbox.

## Who do you want to ask about what?

You can probably not expect that your daily consultant has a handle on all of Microsoft's future plans. The consultants typically focus on what the solution can do precisely today.

If you in the old days were used to your consultant being able to answer everything, then you should know that it is impossible to be an all-knowing consultant today.

The consultants' role has changed in recent years. In the old days, one consultant could have all of Business Central in their head. That time is over. Today the solution is too extensive for one person. There is no consultant who knows every corner of Business Central.

At the same time, you as a customer expect the consultant to have deep expertise when you ask a concrete question. And therefore today, a project needs to be staffed with a group of experts in the important professional areas, plus some generalists who ensure the coherence.

The picture becomes even more complex when you also use apps from several different vendors, and you build functionality and processes with Microsoft Power Platform. As ERP administrator you are today necessarily conscious of whom you ask about what.

## Your contact person at the partner

What should you expect from your contact person at the partner? Experience shows that the best contact person is a broad generalist with curiosity for your business. The person should be able to talk about finance, purchase, sales, and inventory at a level that makes it possible to see connections. It doesn't help if the contact person can only talk about one professional area.

But it's also important that the person understands your industry and your product. It makes a difference whether you sell fashion items or produce industrial equipment. That understanding creates a common language, so you can together identify where the shoe pinches, and what can be improved.

In more complex projects you should also require that the partner brings an architect role, who can create an overview across the entire solution, also with apps, PTEs, integrations, and Power Platform flows, and assess whether everything plays well together.

Let's say as an example that you regularly get a visit from a generalist consultant who can help you in many areas. Now you want to change in the setup of the purchase process, and your generalist consultant is not an expert in that.

Will you prefer that the person spends some hours figuring it out, because it's important that your consultant knows your business, or would you rather have a specialist consultant whom you haven't met before, to advise on changes in the setup in half an hour? That's how a choice can look in practice. There is no correct answer.

## Proactive collaboration

The best collaboration between customer and partner is proactive. It doesn't need to be a heavy and time-consuming arrangement. It can be a short status meeting, for example half an hour every week or month, where you

discuss upcoming updates, known challenges, and whether there's anything planned that requires attention.

In that kind of dialogue, the partner can, for example, make you aware that new EU rules are coming that affect your setup. Or that a new version of Business Central contains standard functionality that may make one of your custom-built extensions redundant. That kind of thing can save money and reduce complexity, but it requires that someone is keeping an eye.

But proactivity is difficult, because both companies and partners have gotten used to being reactive. Most ERP managers don't want the partner to spend time that costs money without it being agreed in advance. And that makes proactivity harder. But we can only encourage that you as ERP manager agree concretely with your partner on what proactivity you want.

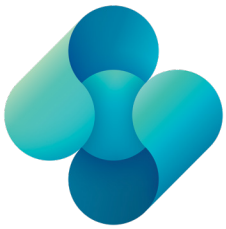
## Take control in the collaboration

You need to take control of your ERP solution. You should not wait for others to take the initiative. Not your partner, management, or the daily users. As ERP manager, it's you who sits with responsibility for Business Central creating value, and that also means it's you who needs to set the direction and take initiative.

Agree with your partner that you expect proactivity. Expect them to orient you on new versions and new possibilities as a fixed part of the collaboration. Expect them to help you modernize the solution by using apps and Power Platform instead of heavy custom development. And expect them to challenge you when you're about to make decisions that make the solution harder to maintain in the long run.

But control isn't only about what you demand of your partner. Make sure that you have an overview and knowledge of your company's processes, solution, and division of responsibility, and that this knowledge is documented and available, so that your company is not dependent on a single consultant (or you).

As ERP manager you have success when the solution doesn't just run, but evolves in step with the business. And when you no longer feel that you're reacting to problems, but are instead the one who sets the agenda in your company.



With this booklet, you have hopefully learned more about your role as an ERP manager and have gained a lot of inspiration.

It has become easier to find information about Business Central. On the Internet, you can easily find information about new versions and help with operating the solution.

We also hope that we at Abakion can contribute. We have both usedynamics.com with lots of instructional videos and we also do what we can to provide the proactive services that we think are necessary for an ERP manager on Business Central.

Write to us at abakion@abakion.com if you have any questions. We would be very happy to help.

Thank you for your time.

abakion

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