2025 DYNAMICS CON

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More Troubleshooting Tools in BC for the Everyday Superhero

Troubleshooting tools in Business Central for the Everyday Superhero

Cynthia Priebe

Cari Corozza

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Session Objectives

1. Walk away from this session with tools that you can use the next time you are troubleshooting an issue
2. Learn how to get more information for better documentation prior to escalation
3. Become more confident investigating your own issues and helping other users

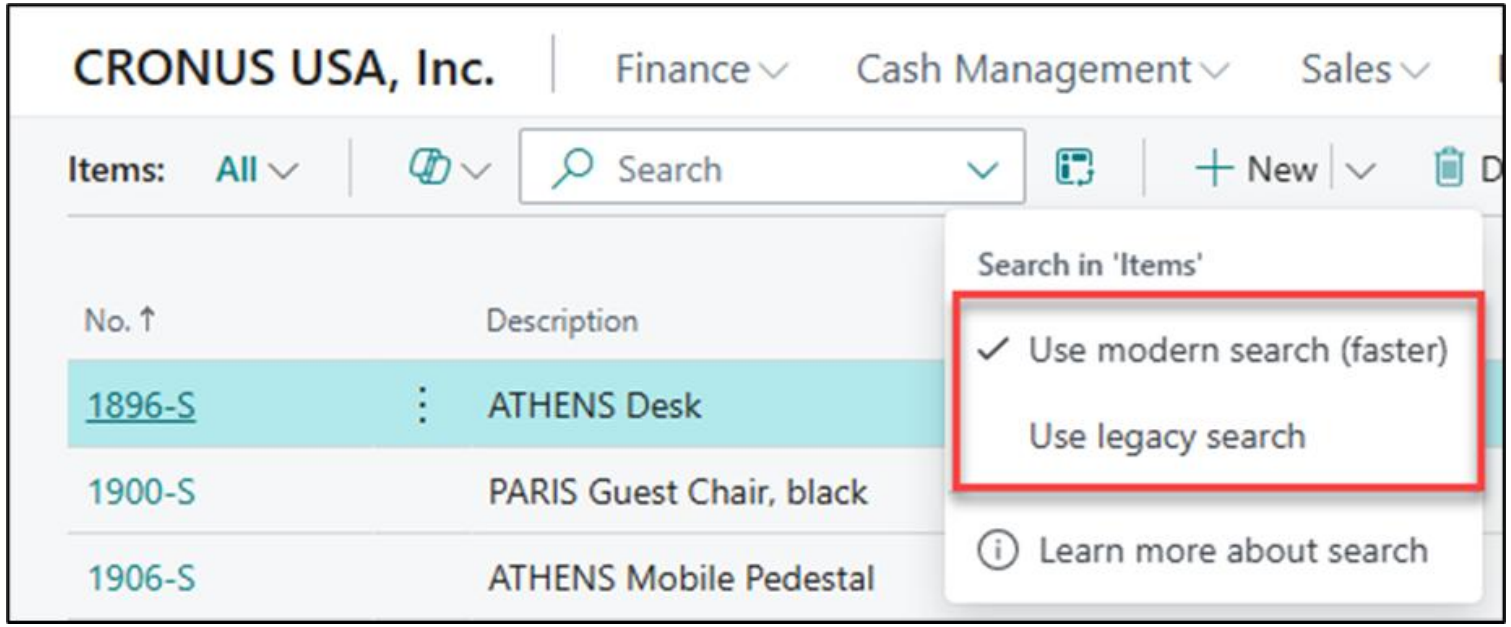
How did you travel to this conference?

Why is my page/list search not finding things?

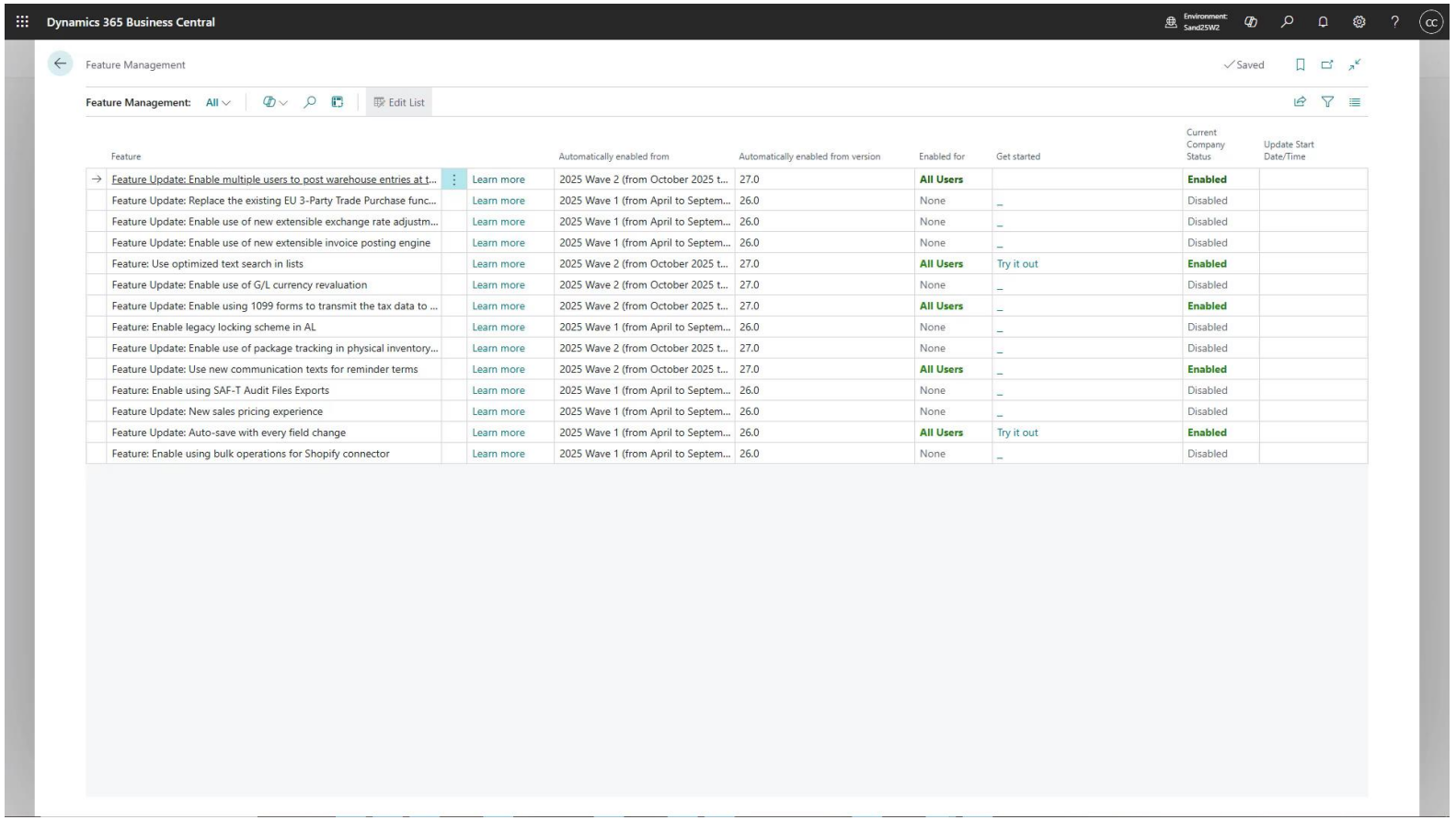
Modern Search

- Starting with main tables – Customers, Contacts, Items, G/L Account
- More tables will be added – Purchase and Sales docs, Projects, G/L Entries, etc.
- Feature Management to enable modern search
- Modern search will become the default method in a future release

Search in List



Modern Search

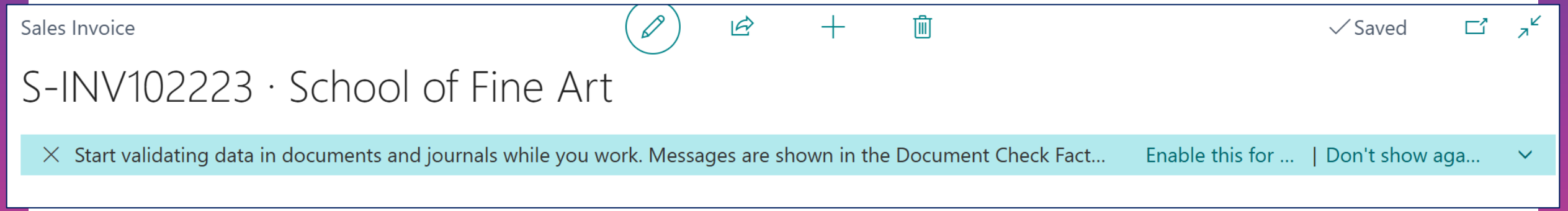


Feature		Automatically enabled from	Automatically enabled from version	Enabled for	Get started	Current Company Status	Update Start Date/Time
Feature Update: Enable multiple users to post warehouse entries at t...	Learn more	2025 Wave 2 (from October 2025 t...	27.0	All Users		Enabled	
Feature Update: Replace the existing EU 3-Party Trade Purchase func...	Learn more	2025 Wave 1 (from April to Septem...	26.0	None	_	Disabled	
Feature Update: Enable use of new extensible exchange rate adjustm...	Learn more	2025 Wave 1 (from April to Septem...	26.0	None	_	Disabled	
Feature Update: Enable use of new extensible invoice posting engine	Learn more	2025 Wave 1 (from April to Septem...	26.0	None	_	Disabled	
Feature: Use optimized text search in lists	Learn more	2025 Wave 2 (from October 2025 t...	27.0	All Users	Try it out	Enabled	
Feature Update: Enable use of G/L currency revaluation	Learn more	2025 Wave 2 (from October 2025 t...	27.0	None	_	Disabled	
Feature Update: Enable using 1099 forms to transmit the tax data to ...	Learn more	2025 Wave 2 (from October 2025 t...	27.0	All Users	_	Enabled	
Feature: Enable legacy locking scheme in AL	Learn more	2025 Wave 1 (from April to Septem...	26.0	None	_	Disabled	
Feature Update: Enable use of package tracking in physical inventory...	Learn more	2025 Wave 2 (from October 2025 t...	27.0	None	_	Disabled	
Feature Update: Use new communication texts for reminder terms	Learn more	2025 Wave 2 (from October 2025 t...	27.0	All Users	_	Enabled	
Feature: Enable using SAF-T Audit Files Exports	Learn more	2025 Wave 1 (from April to Septem...	26.0	None	_	Disabled	
Feature Update: New sales pricing experience	Learn more	2025 Wave 1 (from April to Septem...	26.0	None	_	Disabled	
Feature Update: Auto-save with every field change	Learn more	2025 Wave 1 (from April to Septem...	26.0	All Users	Try it out	Enabled	
Feature: Enable using bulk operations for Shopify connector	Learn more	2025 Wave 1 (from April to Septem...	26.0	None	_	Disabled	

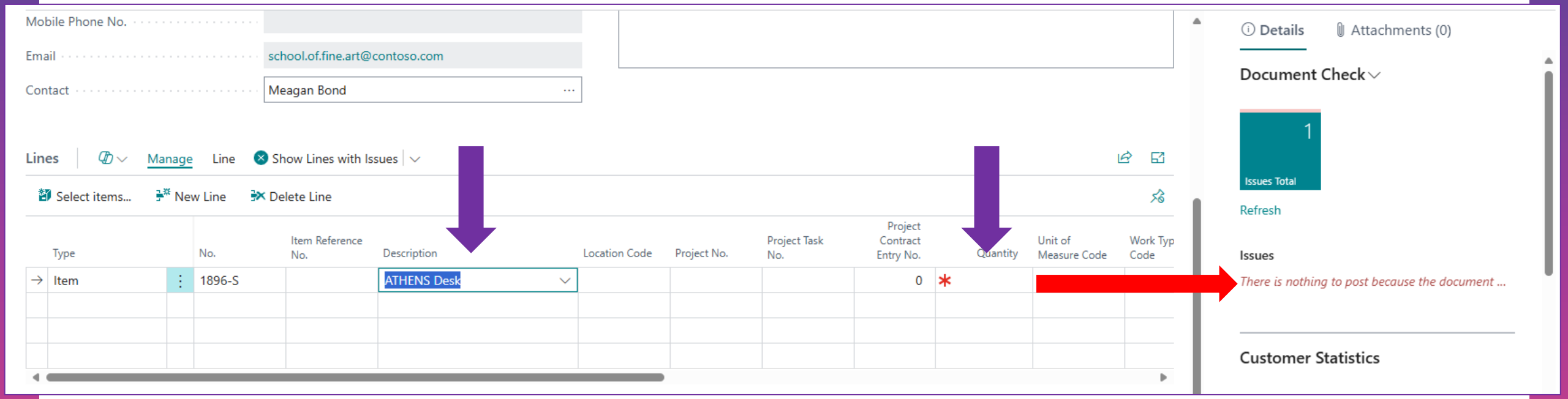
2025 DYNAMICS CON

Why are errors message so confusing?

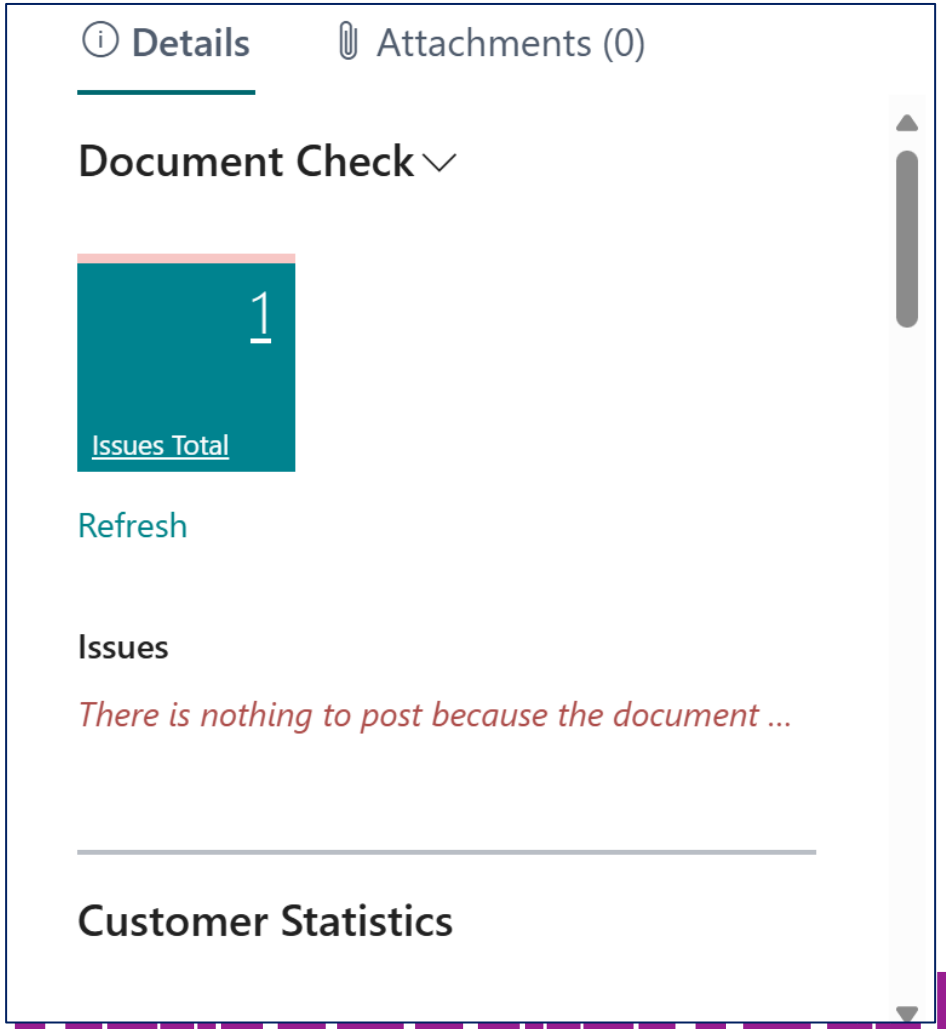
Validate data in documents as you work



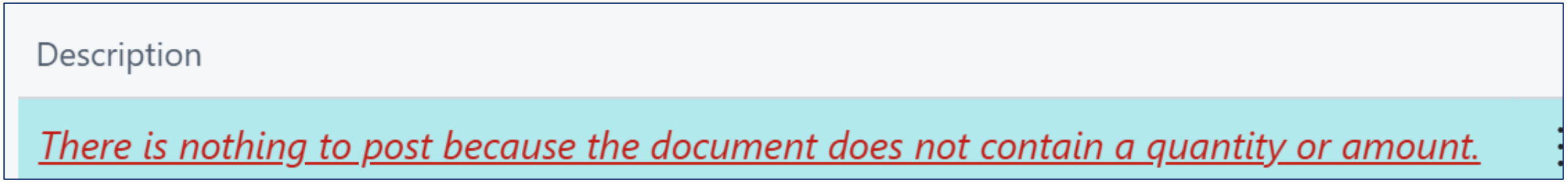
Entering Sales Invoice



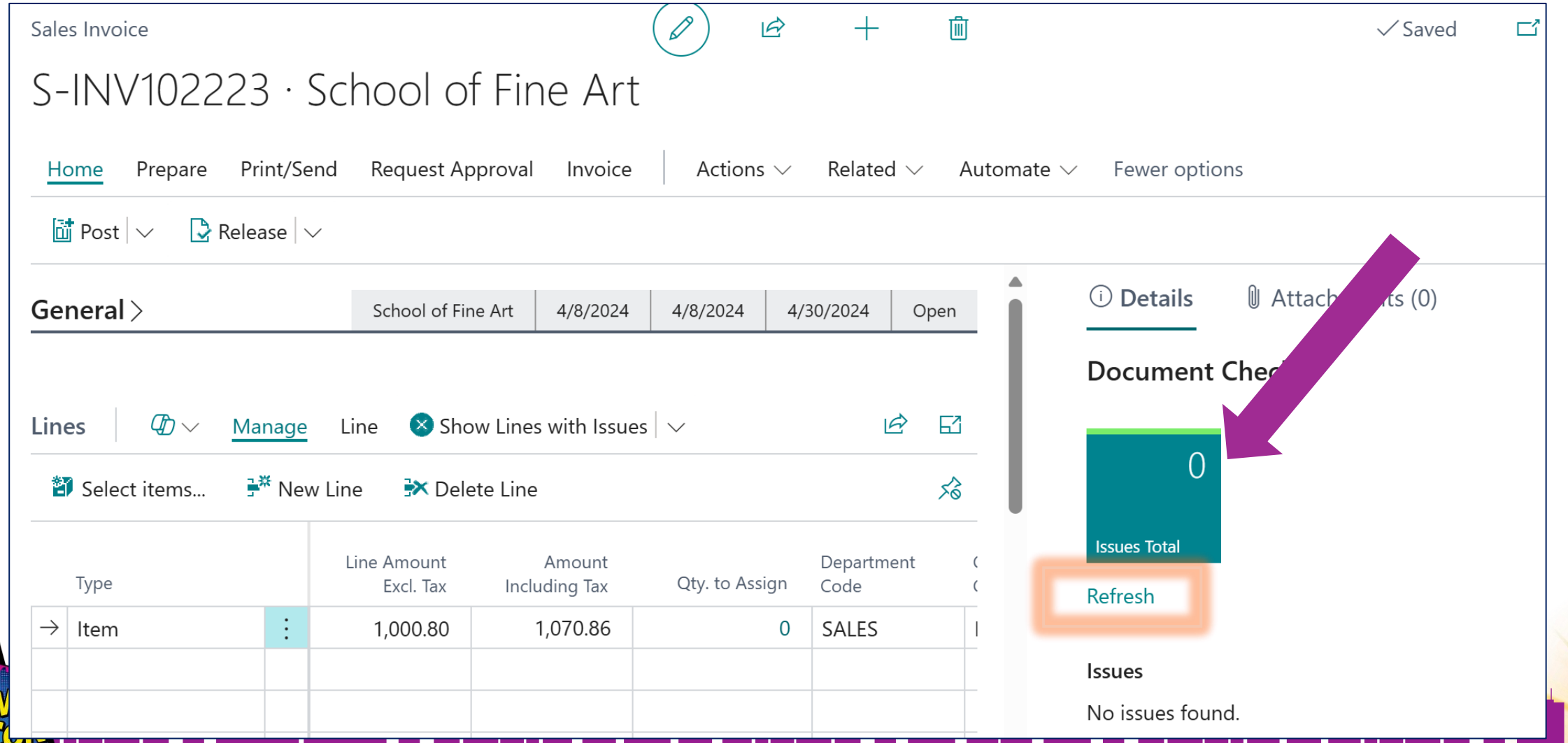
Validate data in documents as you work



Validate data in documents as you work



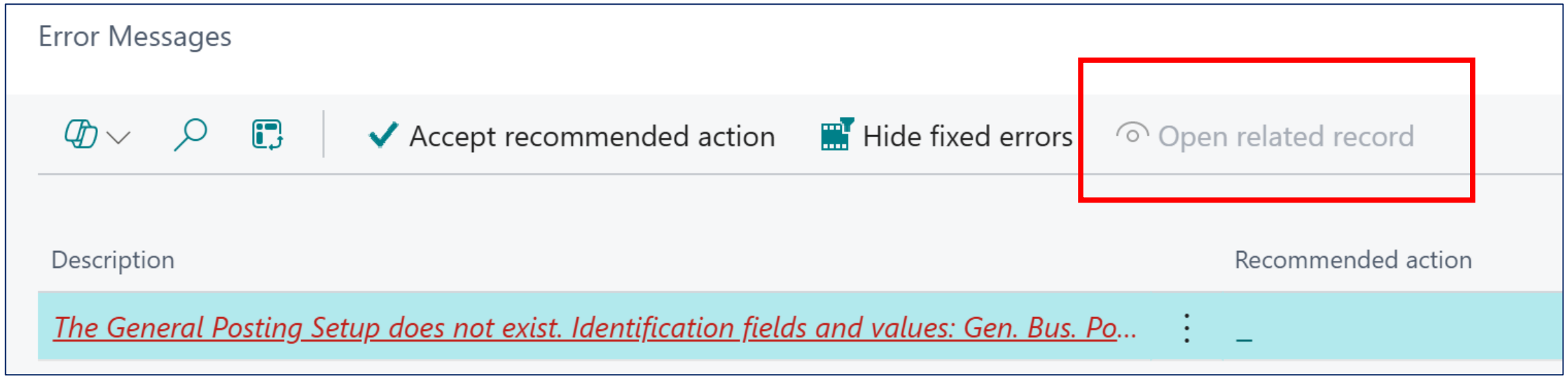
Validate data in documents as you work



Posting Error

The General Posting Setup does not exist. Identification fields and values: Gen. Bus. Posting Group='DOMESTIC',Gen. Prod. Posting Group='RETAIL'

Posting Error



Notif

Art

Sales Invoice

S-INV102223 · Sche

Notifications: 2

This customer has an overdue b

The customer's credit limit has b

Post | Release

Saved

Green

Credit Limit Notification - 30000 · School of Fine Art

Manage New Report Page

The customer's credit limit has been exceeded.

Details

No.	30000
Name	School of Fine Art
Balance ($)	53,833.52
Outstanding Amt. ($)	16,320.07
Shipped/Ret. Rcd. Not Invd. ($)	0.00
Current Amount ($)	1,070.86
Total Amount ($)	70,153.59
Credit Limit ($)	52,000.00
Overdue Amounts ($)	53,833.52
Invoiced Prepayment Amount ($)	0.00

Close

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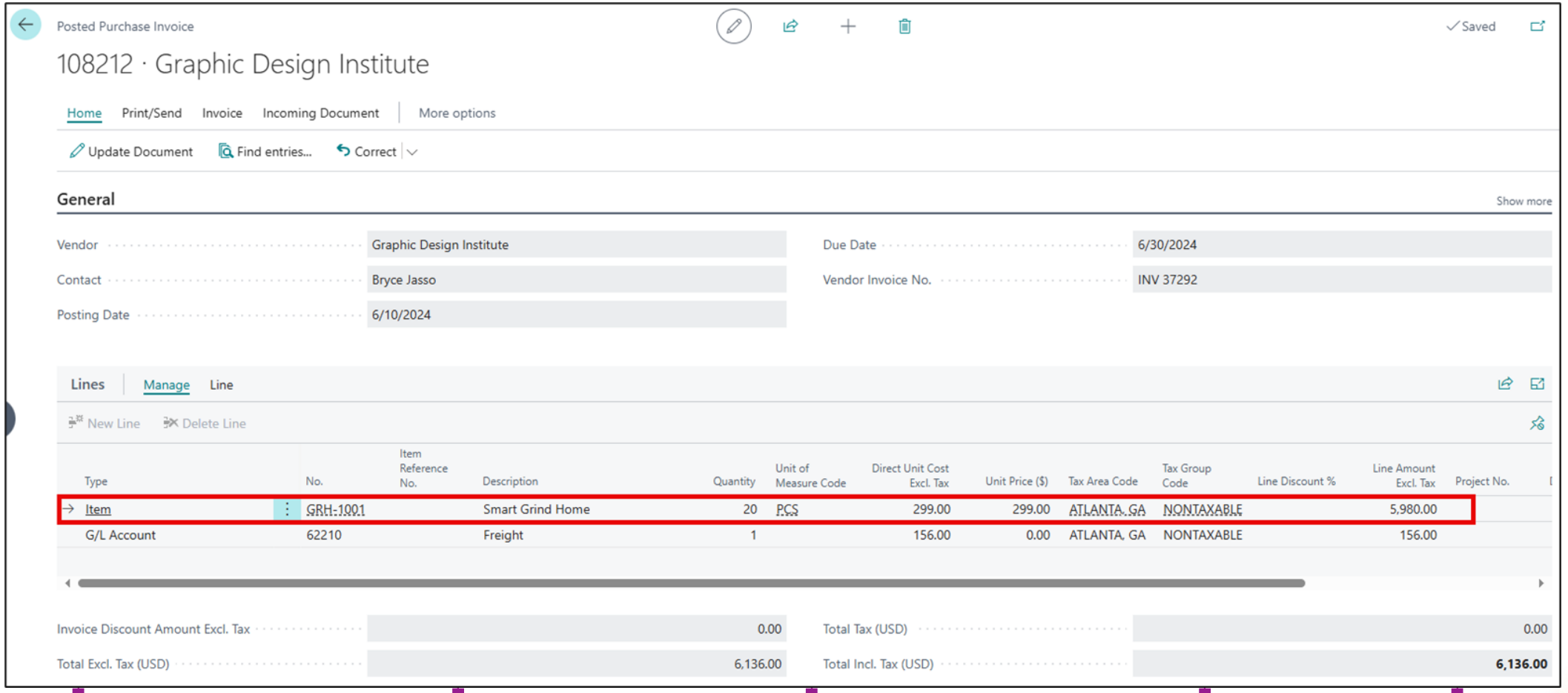
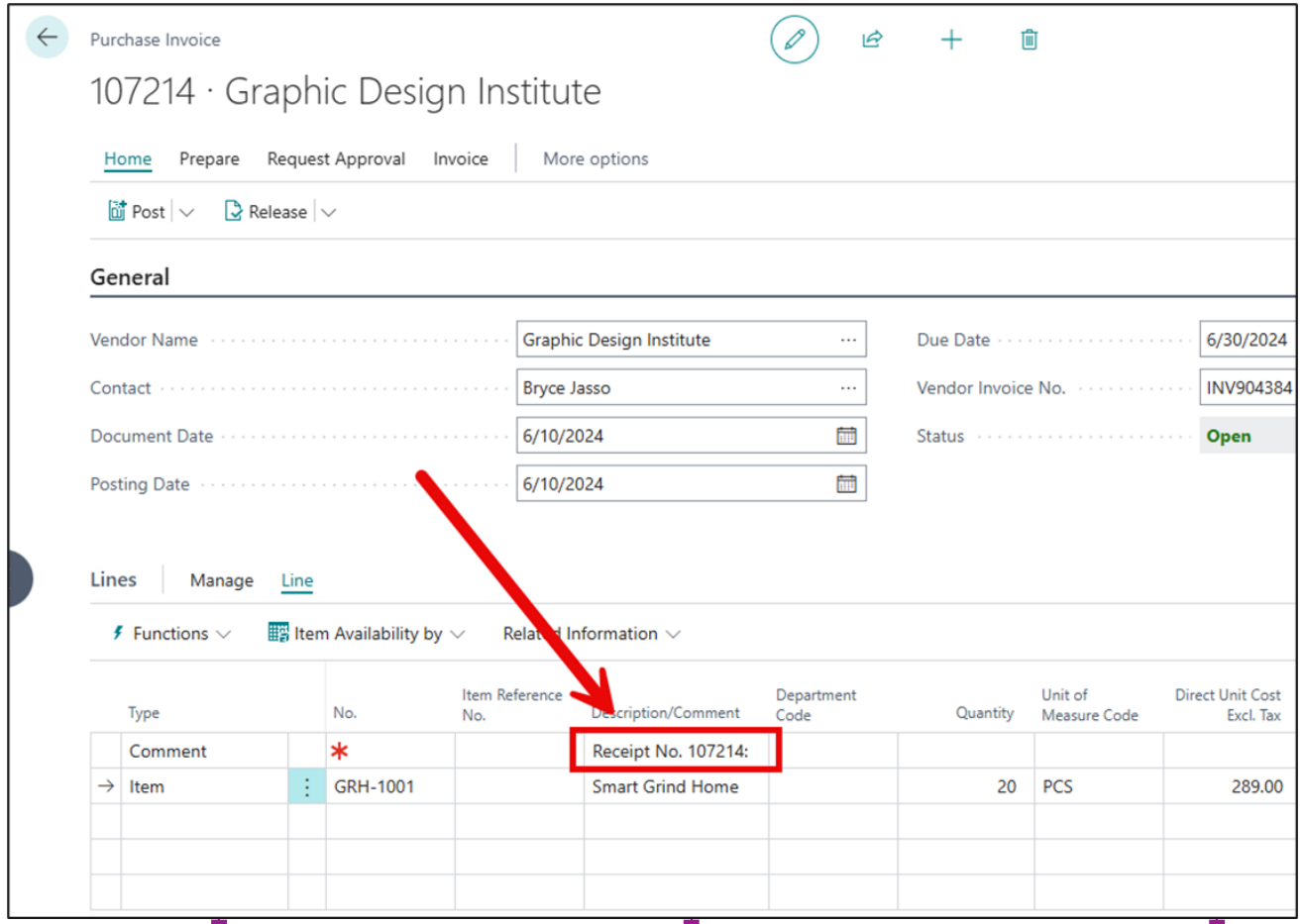
Was this Posted Purchase Invoice actually invoiced against the PO?

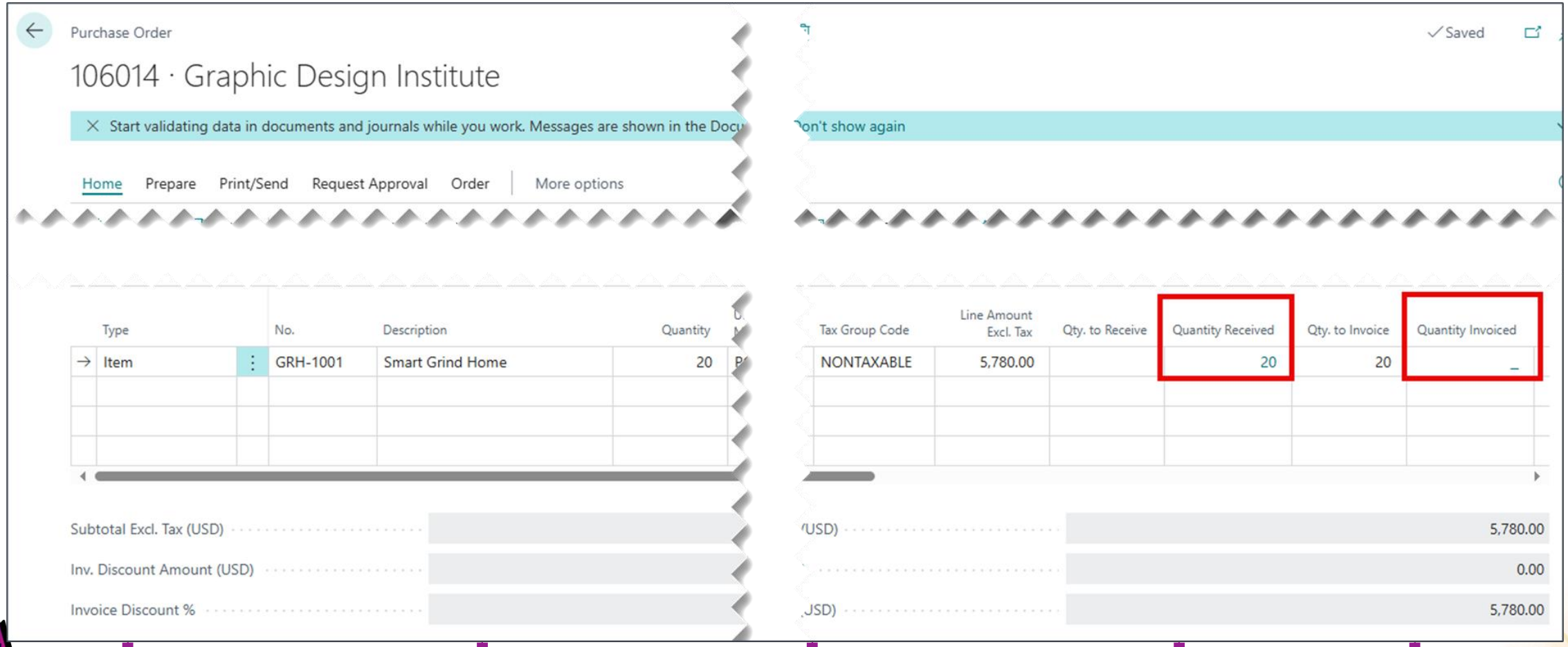
Posted Purchase Invoice



Posted Purchase Invoice



Purchase Order

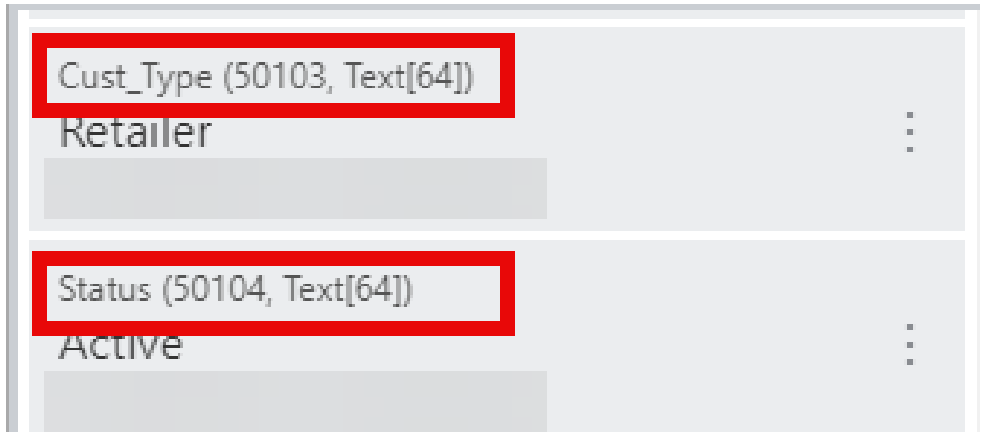


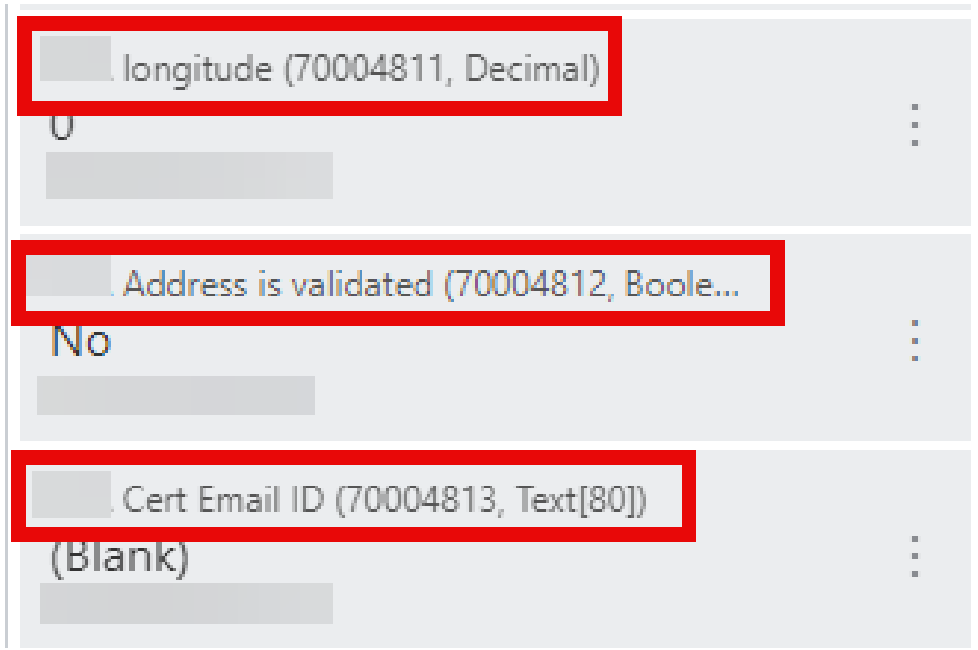
Page Inspection

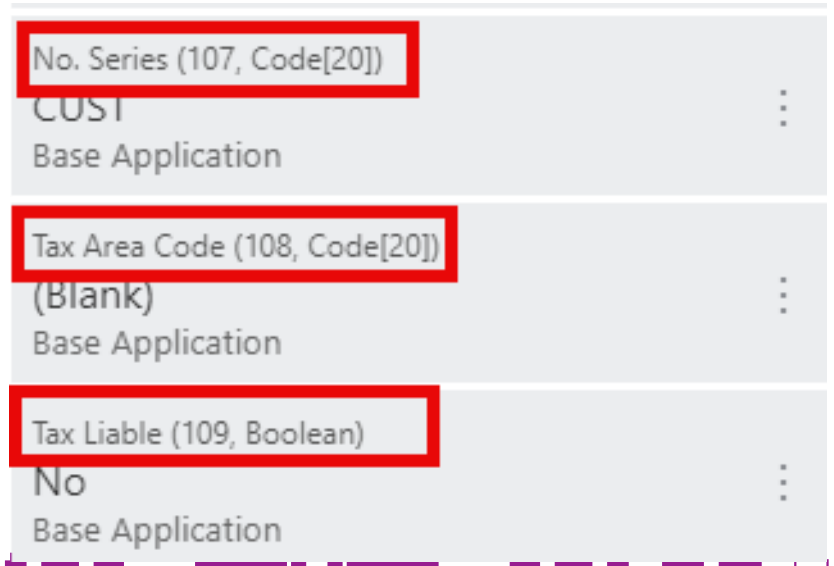
Page Inspection – Object Numbering

0-49,999	Business Central base functionality
50,000-99,999	Customizations and test purposes
100,000-999,999	Microsoft localization for country or region
1,000,000-69,999,999	Registered Solution Program (RSP)
70,000,000-74,999,999	Extensions from apps

Object Numbering - Examples







What is an easy way to compare records when troubleshooting?

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Sales Order

S-ORD101011 · Adatum Corporation

Saved

Home | Prepare | Print/Send | Request Approval | Order | Report | More options

Post... | Release | Create Warehouse Shipment | Create Inventory Put-away/Pick... | Archive Document

General

Show more

Customer Name	Adatum Corporation	Due Date	5/8/2024
Contact	Robert Townes	Requested Delivery Date	
Document Date	4/8/2024	External Document No.	
Posting Date	4/8/2024	Status	Open
Order Date	4/8/2024		

Lines

Manage | Line | Order

New Line | Delete Line | Select items...

Type	No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Line Discount %
Item	WRB-1000	Whole Roasted Beans, Colombia			2	_	PCS	15.00	ATLANTA, GA	NONTAXABLE	DOMESTIC	RETAIL	10

Subtotal Excl. Tax (USD)	27.00	Total Excl. Tax (USD)	27.00
Inv. Discount Amount Excl. Tax (USD)	0.00	Total Tax (USD)	0.00
Invoice Discount %	0	Total Incl. Tax (USD)	27.00

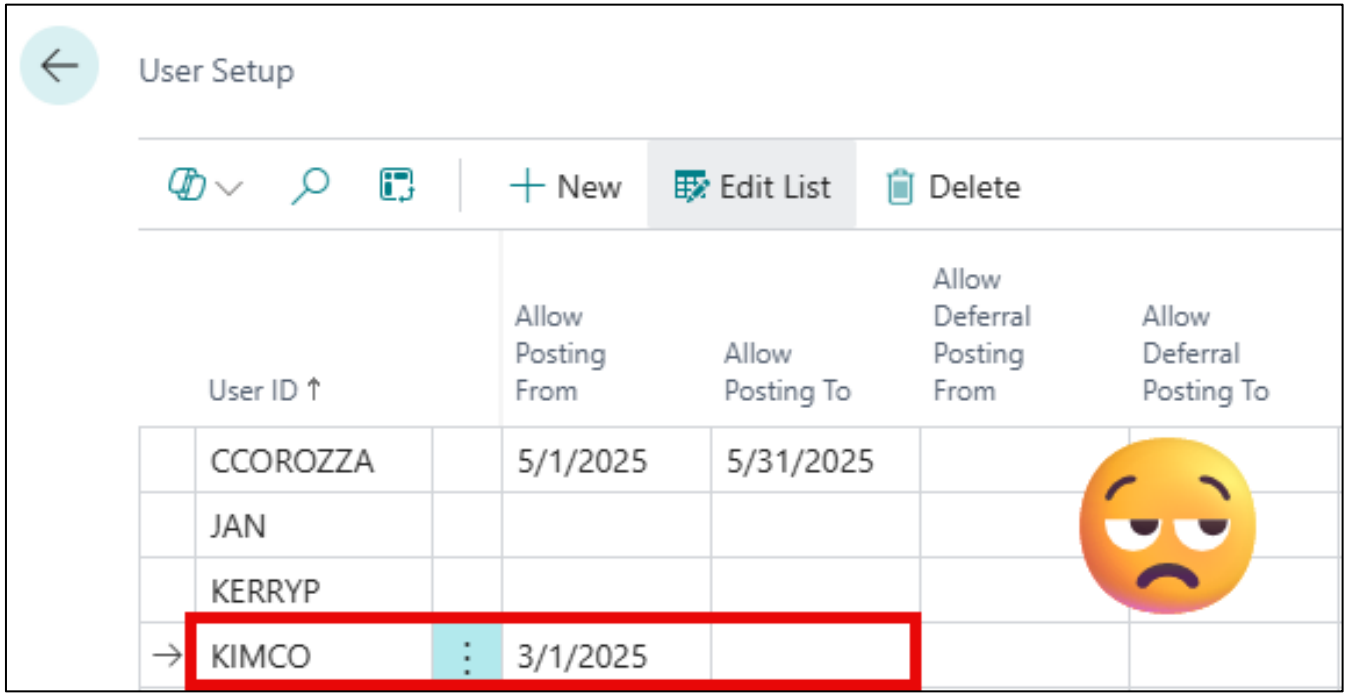
Invoice Details

Show more

Currency Code		Payment Service	No payment service is made available.

How can I track who keeps changing the User Setup Posting Dates?

User Setup – Allowed Posting Dates

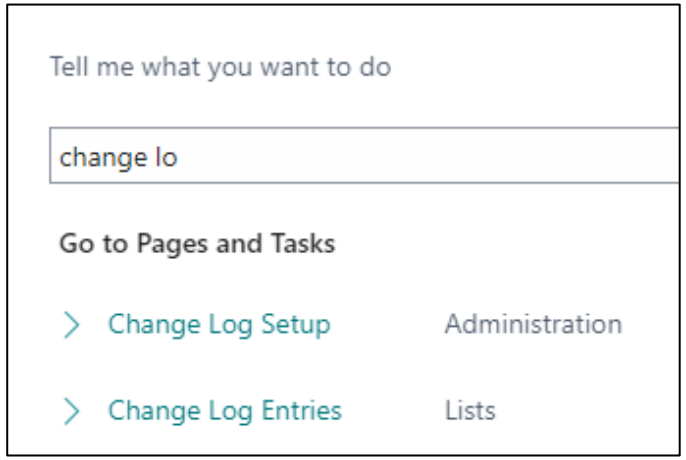


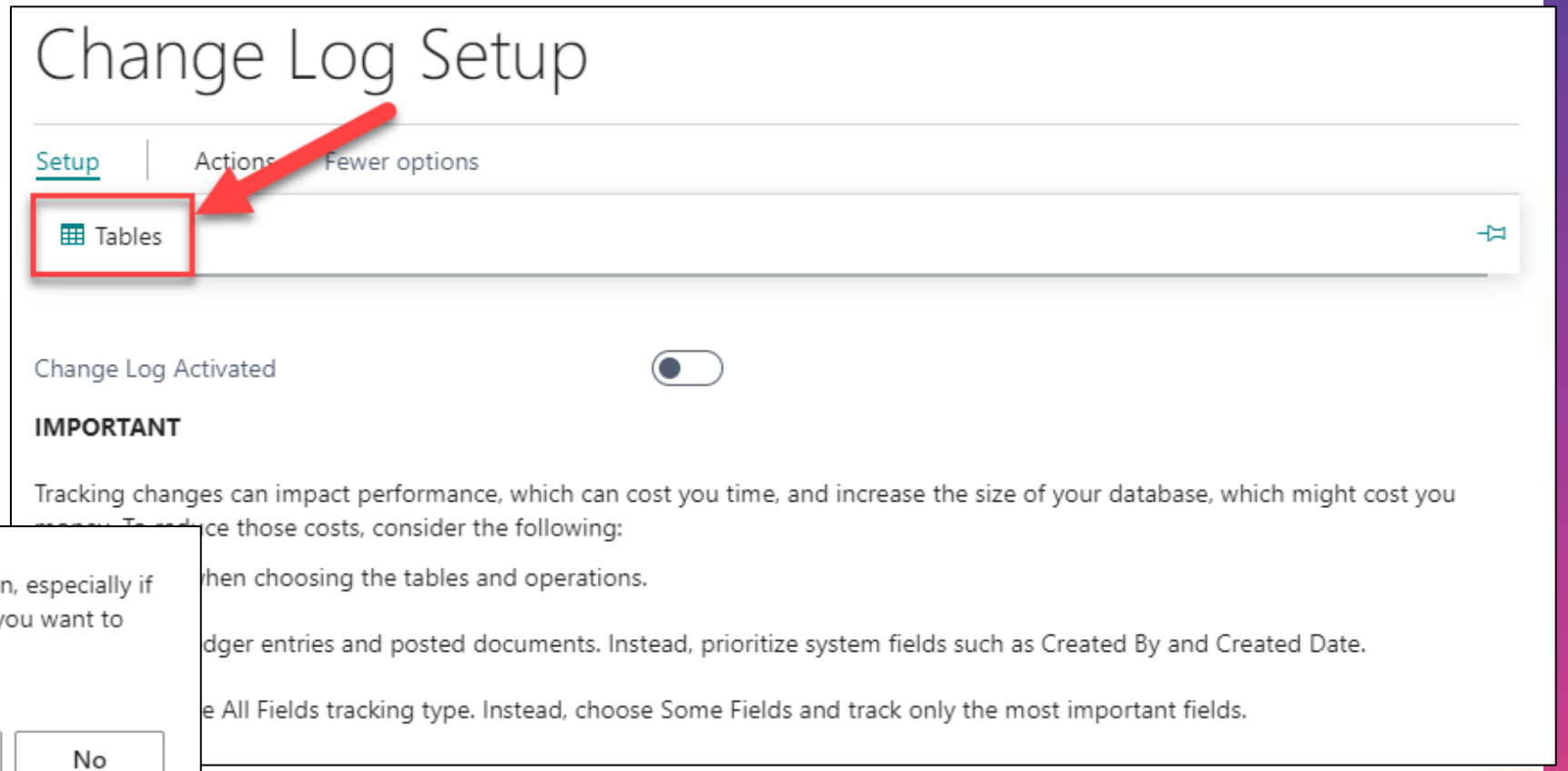
Two Options

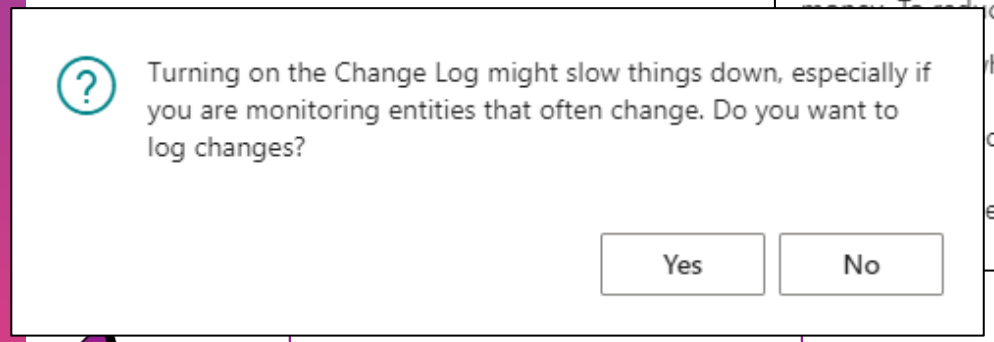
Change Log

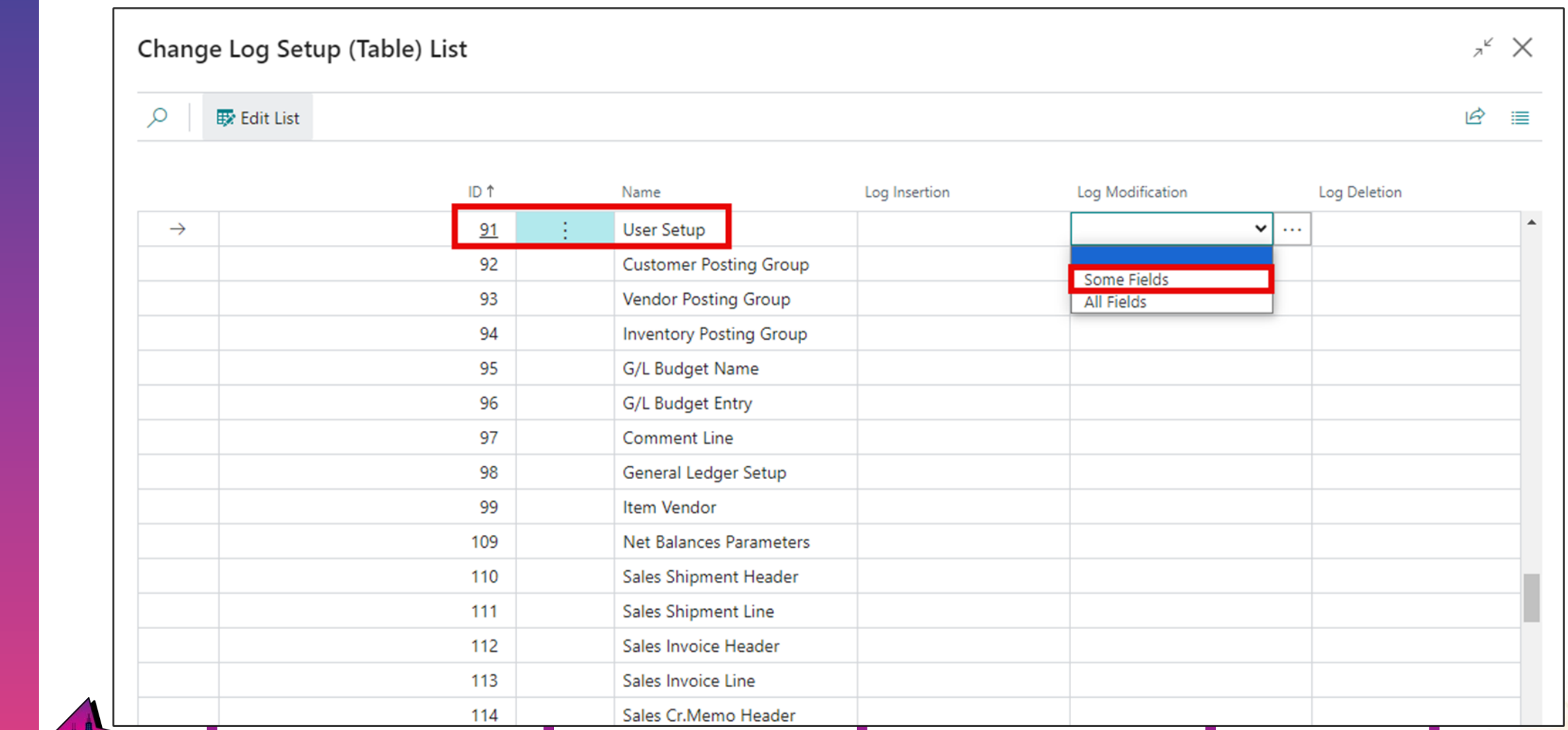
Monitored Fields

Change Log - Setup









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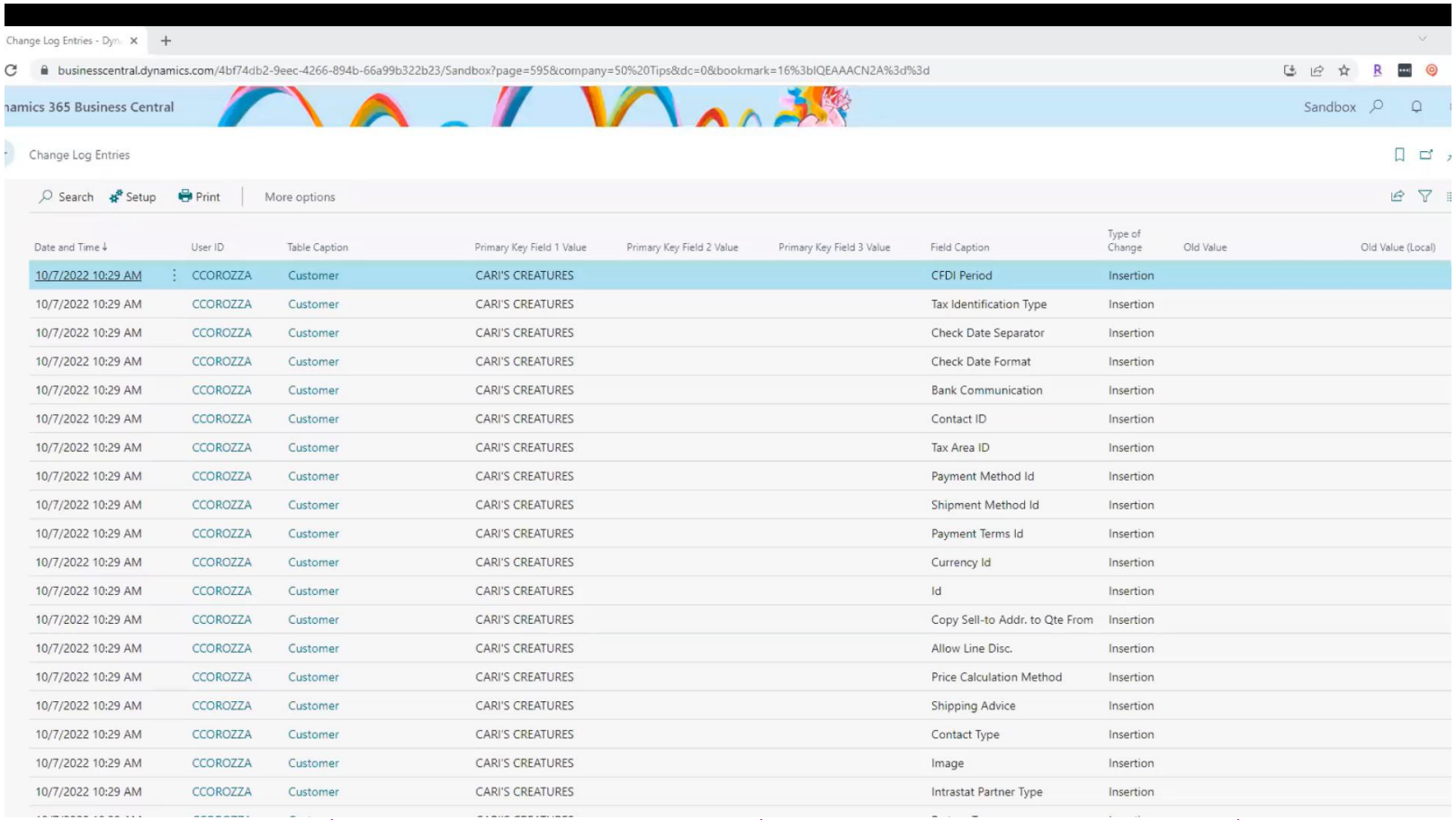
Change Log Setup (Field) List - 0

Edit List

No. ↑	Field Caption	Log Modification
1	User ID	☐
2	Allow Posting From	☑
3	Allow Posting To	☑
4	Register Time	☐
5	Allow Deferral Posting From	☑
6	Allow Deferral Posting To	☑
10	Salespers./Purch. Code	☐
11	Approver ID	☐
12	Sales Amount Approval Limit	☐
13	Purchase Amount Approval Limit	☐
14	Unlimited Sales Approval	☐
15	Unlimited Purchase Approval	☐
16	Substitute	☐
17	E-Mail	☐
18	Phone No.	☐

Review Changes



Date and Time	User ID	Table Caption	Primary Key Field 1 Value	Primary Key Field 2 Value	Primary Key Field 3 Value	Field Caption	Type of Change	Old Value	Old Value (Local)
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			CFDI Period	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Tax Identification Type	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Check Date Separator	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Check Date Format	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Bank Communication	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Contact ID	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Tax Area ID	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Payment Method Id	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Shipment Method Id	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Payment Terms Id	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Currency Id	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Id	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Copy Sell-to Addr. to Qte From	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Allow Line Disc.	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Price Calculation Method	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Shipping Advice	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Contact Type	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Image	Insertion		
10/7/2022 10:29 AM	CCOROZZA	Customer	CARI'S CREATURES			Intrastat Partner Type	Insertion		

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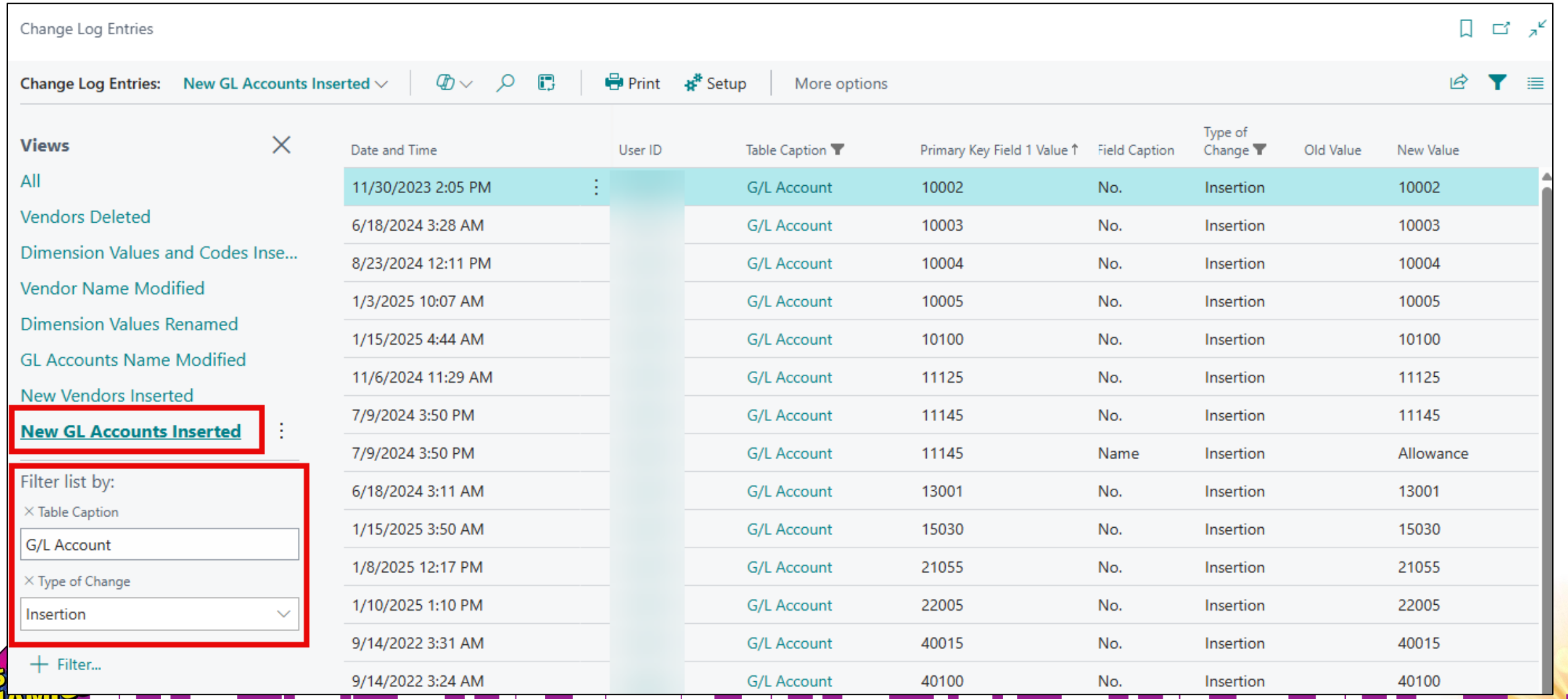
Review Changes – Use to Troubleshoot

Change Log Entries

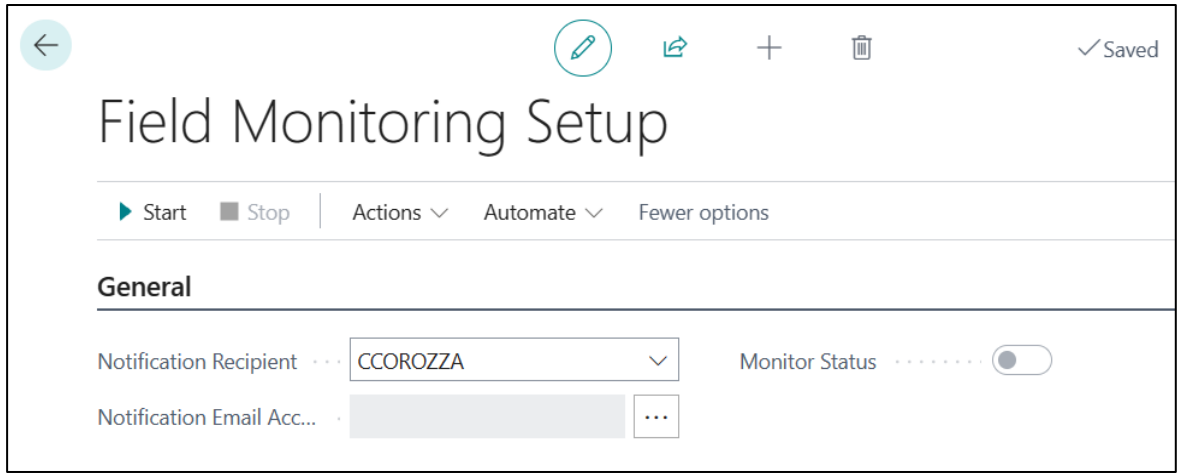
Print | Setup | More options

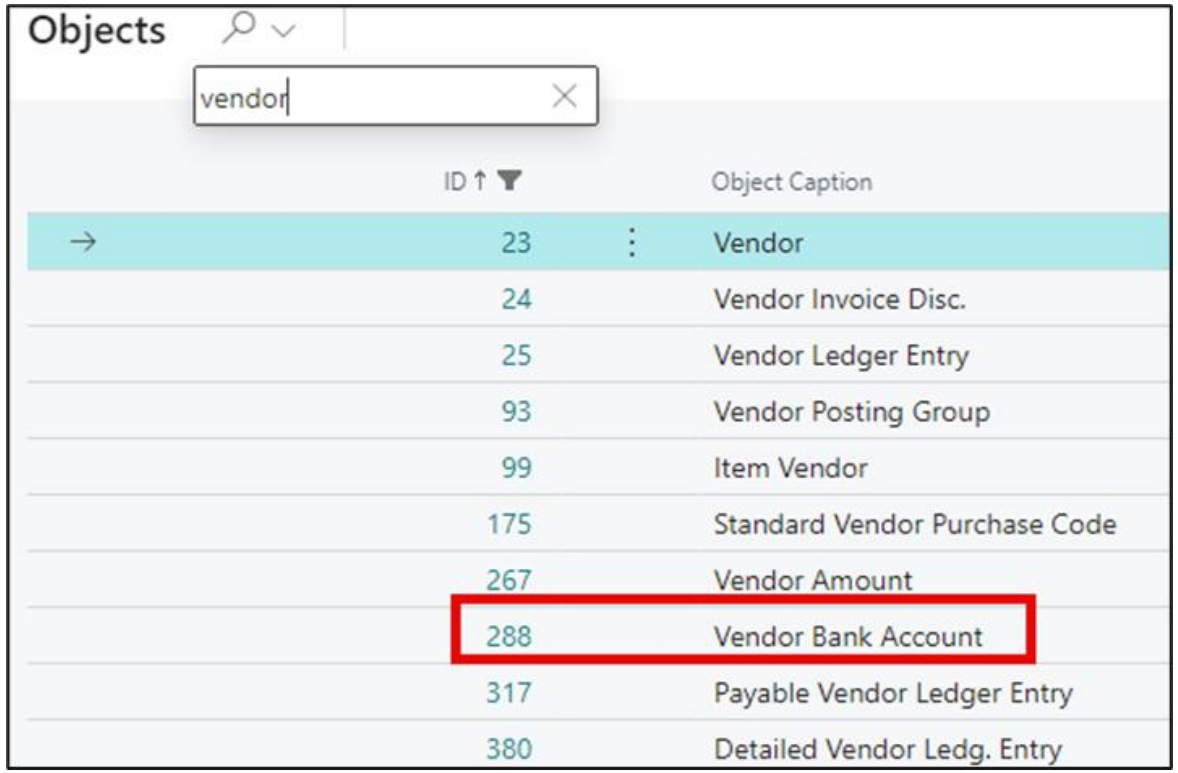
Date and Time ↓	User ID	Table Caption	Primary Key Field 1 Value	Field Caption	Type of Change	Old Value	New Value
4/24/2025 9:53 AM	CCOROZZA	User Setup	KIMCO	Allow Posting From	Modification		2025-03-01
4/24/2025 9:53 AM	CCOROZZA	User Setup	CCOROZZA	Allow Posting To	Modification		2025-05-31
4/24/2025 9:53 AM	CCOROZZA	User Setup	CCOROZZA	Allow Posting From	Modification		2025-05-01

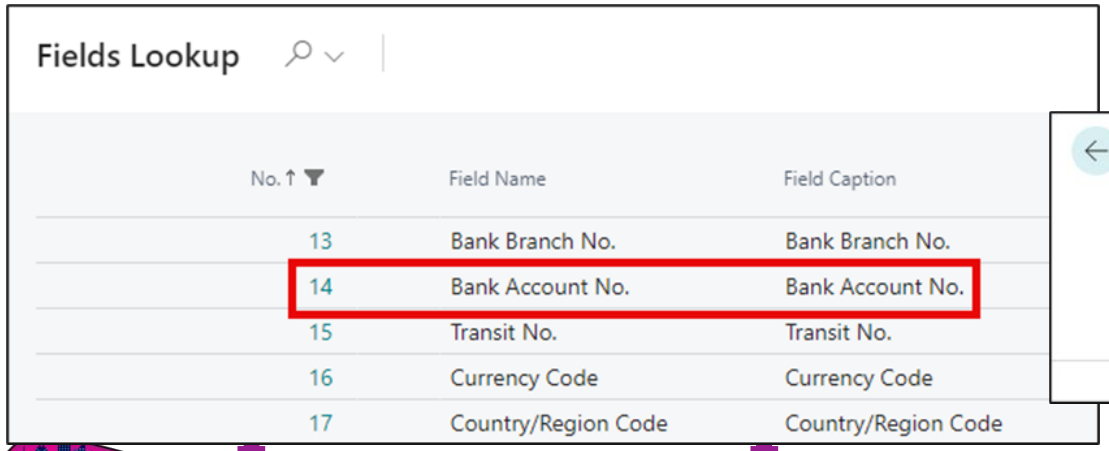
Saved View

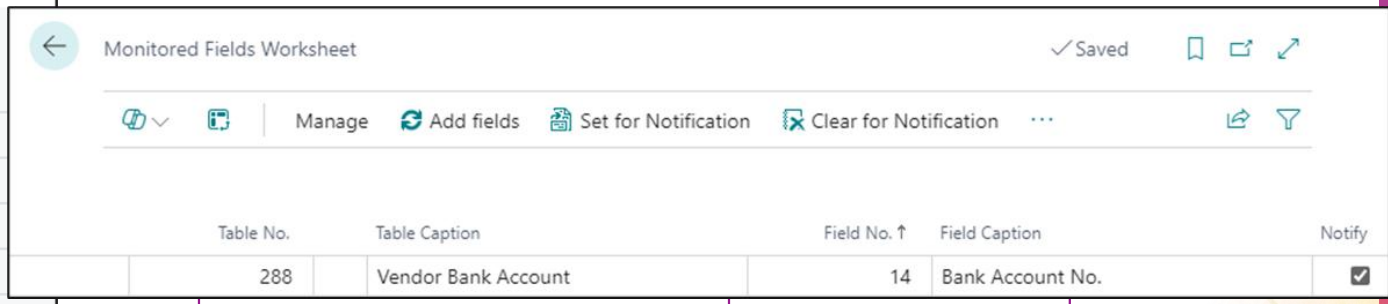

Change Log Entries
Change Log Entries: New GL Accounts Inserted
Print
Setup
More options
Views
All
Vendors Deleted
Dimension Values and Codes Inse...
Vendor Name Modified
Dimension Values Renamed
GL Accounts Name Modified
New Vendors Inserted
New GL Accounts Inserted
Filter list by:
Table Caption
G/L Account
Type of Change
Insertion
Filter...
Date and Time
User ID
Table Caption
Primary Key Field 1 Value
Field Caption
Type of Change
Old Value
New Value
11/30/2023 2:05 PM G/L Account 10002 No. Insertion 10002
6/18/2024 3:28 AM G/L Account 10003 No. Insertion 10003
8/23/2024 12:11 PM G/L Account 10004 No. Insertion 10004
1/3/2025 10:07 AM G/L Account 10005 No. Insertion 10005
1/15/2025 4:44 AM G/L Account 10100 No. Insertion 10100
11/6/2024 11:29 AM G/L Account 11125 No. Insertion 11125
7/9/2024 3:50 PM G/L Account 11145 No. Insertion 11145
7/9/2024 3:50 PM G/L Account 11145 Name Insertion Allowance
6/18/2024 3:11 AM G/L Account 13001 No. Insertion 13001
1/15/2025 3:50 AM G/L Account 15030 No. Insertion 15030
1/8/2025 12:17 PM G/L Account 21055 No. Insertion 21055
1/10/2025 1:10 PM G/L Account 22005 No. Insertion 22005
9/14/2022 3:31 AM G/L Account 40015 No. Insertion 40015
9/14/2022 3:24 AM G/L Account 40100 No. Insertion 40100

Monitor Fields

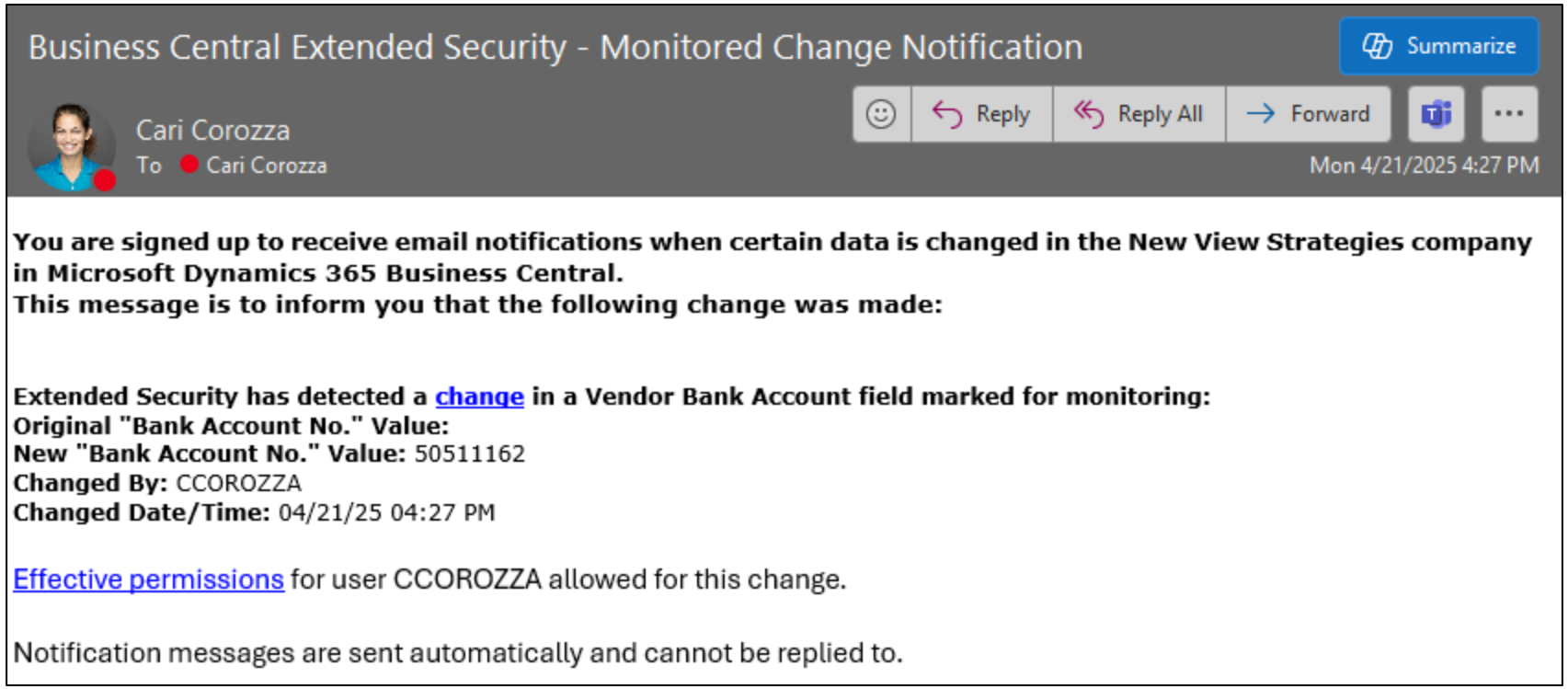








Notification Email – Monitored Fields



Business Central Extended Security - Monitored Change Notification

Summarize

Reply | Reply All | Forward

Cari Corozza
To Cari Corozza

Mon 4/21/2025 4:27 PM

You are signed up to receive email notifications when certain data is changed in the New View Strategies company in Microsoft Dynamics 365 Business Central.
This message is to inform you that the following change was made:

Extended Security has detected a change in a Vendor Bank Account field marked for monitoring:
Original "Bank Account No." Value:
New "Bank Account No." Value: 50511162
Changed By: CCOROZZA
Changed Date/Time: 04/21/25 04:27 PM

Effective permissions for user CCOROZZA allowed for this change.

Notification messages are sent automatically and cannot be replied to.

Track Field in Change Log also adds it To Monitored Fields Worksheet

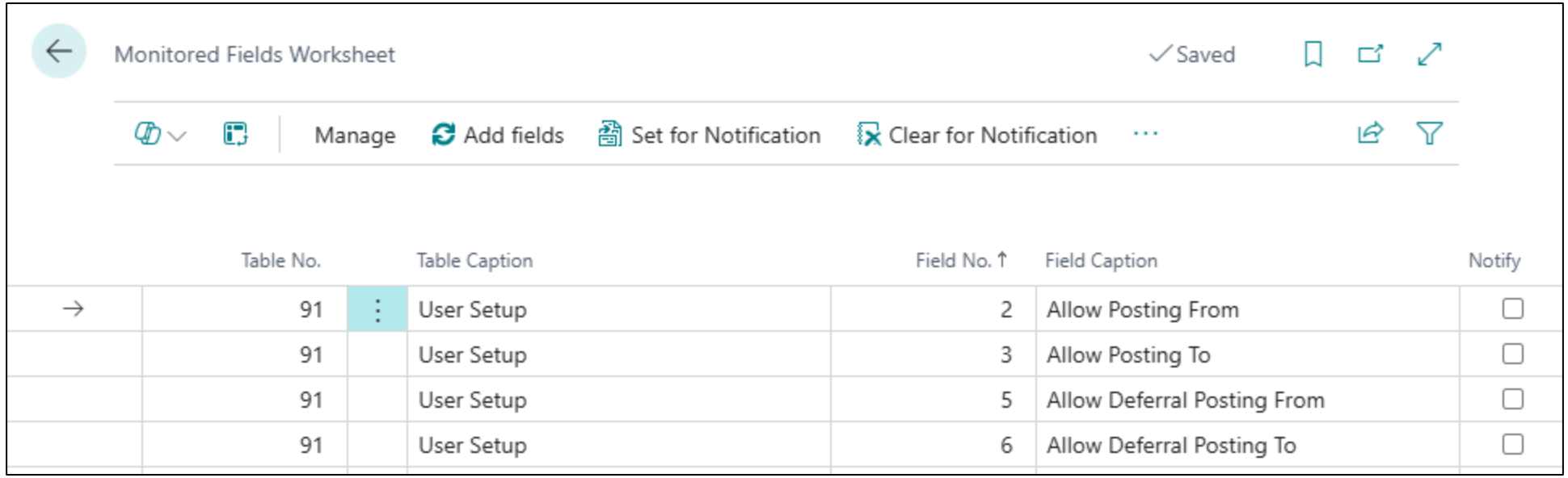
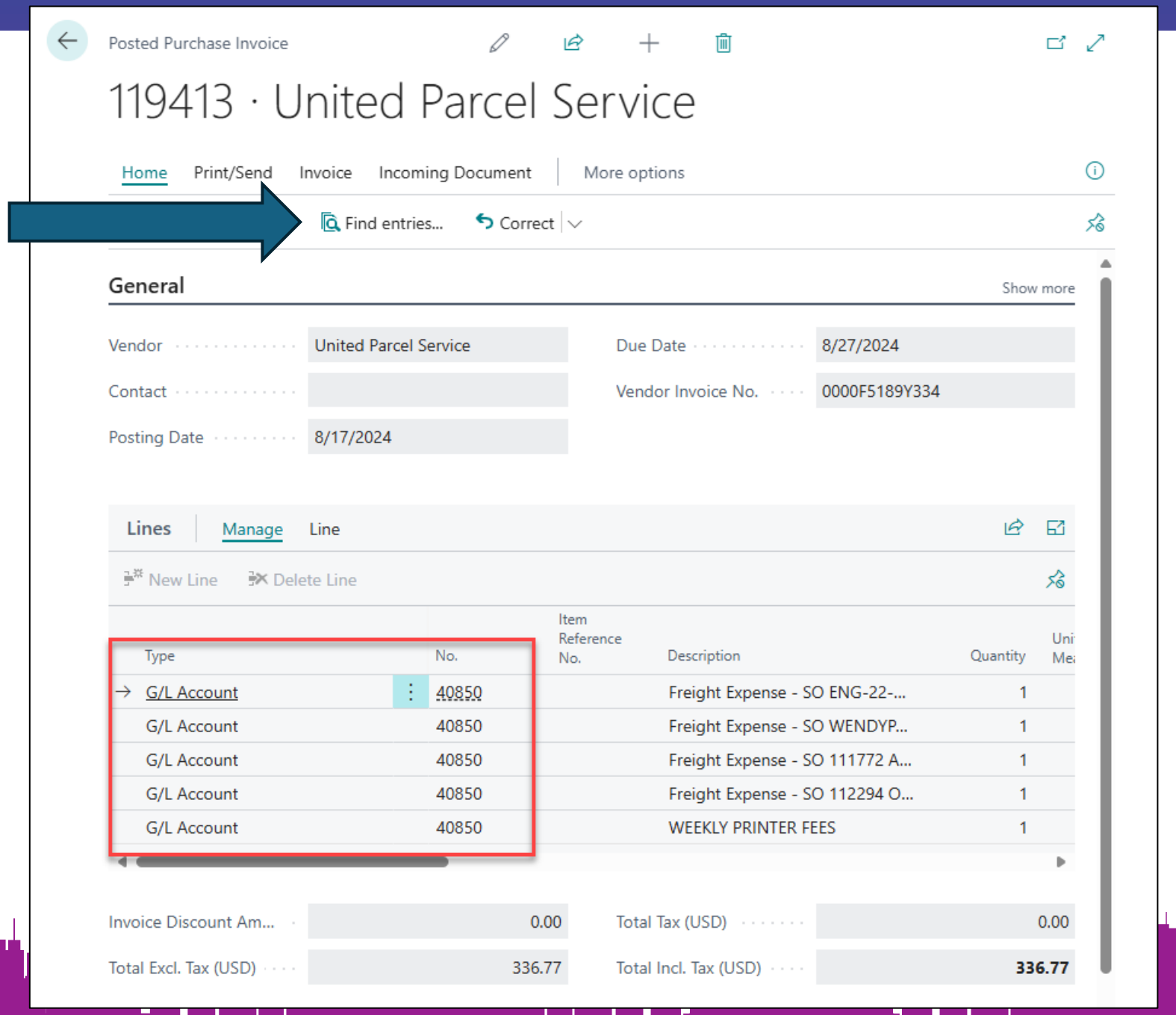
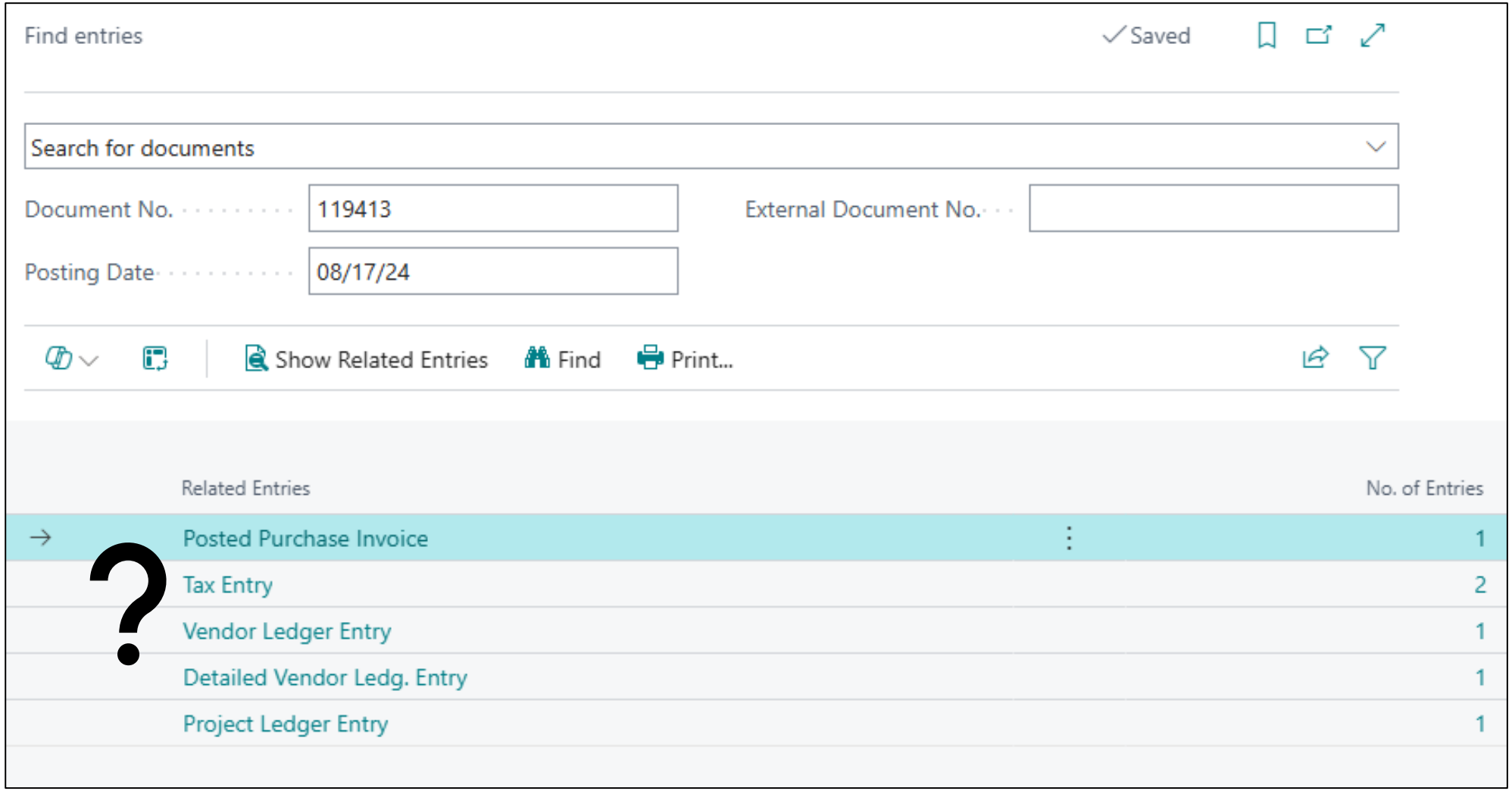


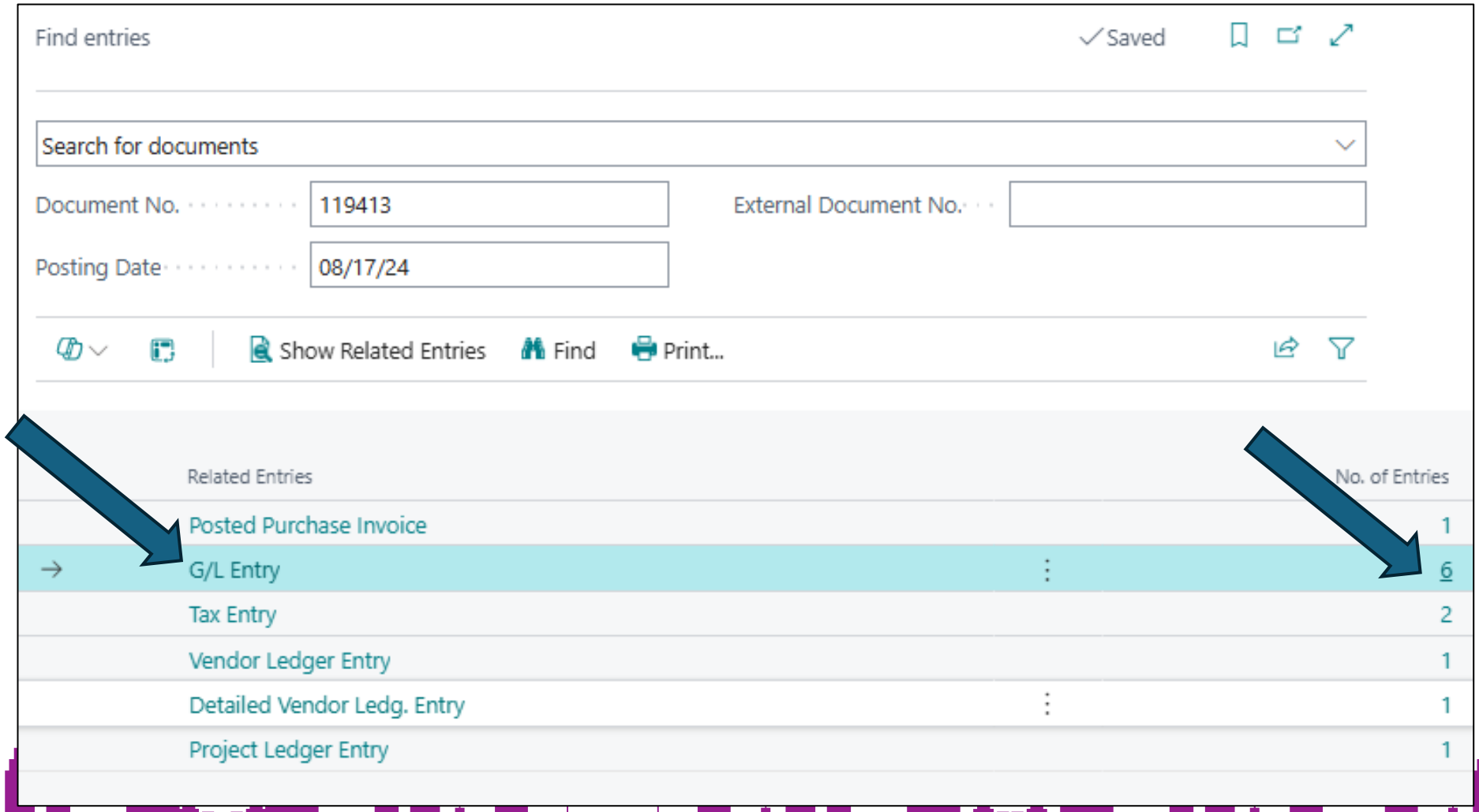
Table No.	Table Caption	Field No. ↑	Field Caption	Notify
91	User Setup	2	Allow Posting From	☐
91	User Setup	3	Allow Posting To	☐
91	User Setup	5	Allow Deferral Posting From	☐
91	User Setup	6	Allow Deferral Posting To	☐

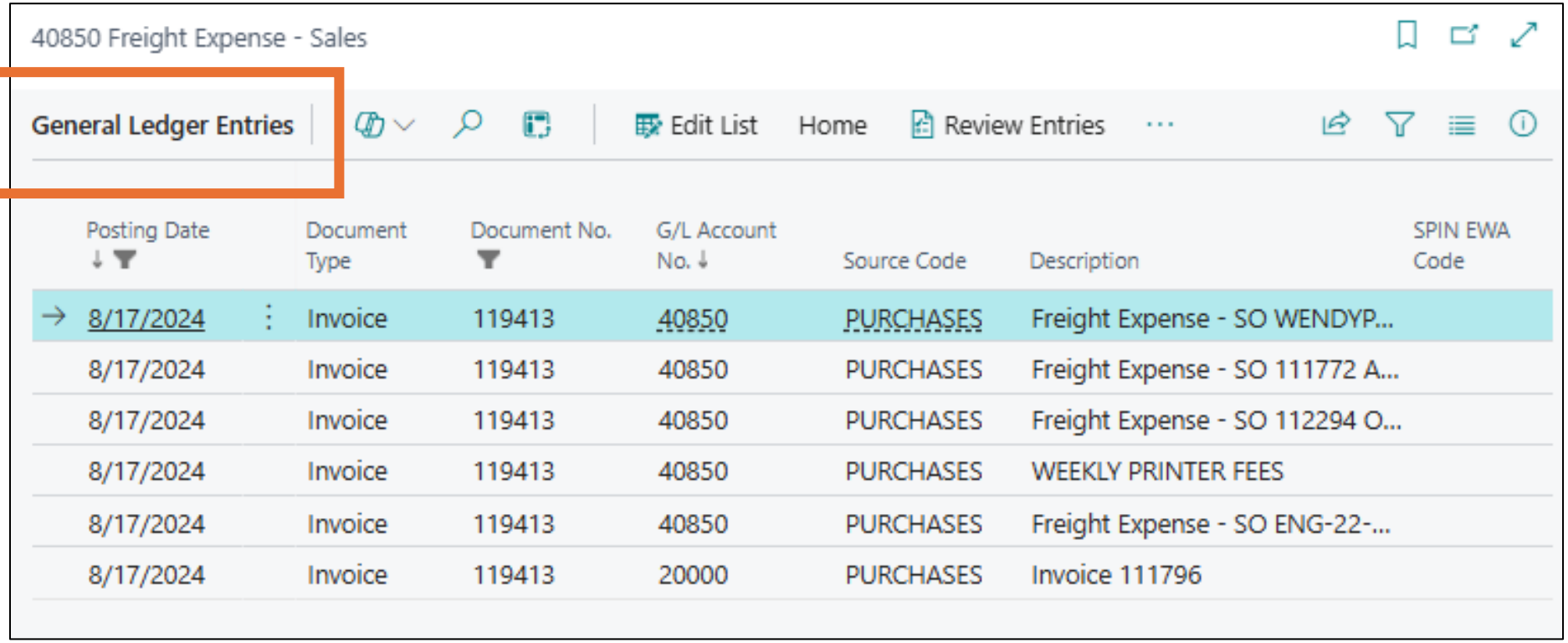
Why aren't G/L Entries listed in Find Entries?


Posted Purchase Invoice
119413 · United Parcel Service
Home
Print/Send
Invoice
Incoming Document
More options
Find entries...
Correct
General
Show more
Vendor
United Parcel Service
Due Date
8/27/2024
Contact
Vendor Invoice No.
0000F5189Y334
Posting Date
8/17/2024
Lines
Manage
Line
New Line
Delete Line
Type
No.
Item Reference No.
Description
Quantity
G/L Account
40850
Freight Expense - SO ENG-22-...
1
G/L Account
40850
Freight Expense - SO WENDYP...
1
G/L Account
40850
Freight Expense - SO 111772 A...
1
G/L Account
40850
Freight Expense - SO 112294 O...
1
G/L Account
40850
WEEKLY PRINTER FEES
1
Invoice Discount Am...
0.00
Total Tax (USD)
0.00
Total Excl. Tax (USD)
336.77
Total Incl. Tax (USD)
336.77


Find entries
Saved
Search for documents
Document No.
119413
External Document No.
Posting Date
08/17/24
Show Related Entries
Find
Print...
Related Entries
No. of Entries
Posted Purchase Invoice
1
Tax Entry
2
Vendor Ledger Entry
1
Detailed Vendor Ledg. Entry
1
Project Ledger Entry
1
?

My user can see G/L Entries




40850 Freight Expense - Sales
General Ledger Entries
Edit List
Home
Review Entries
Posting Date
Document Type
Document No.
G/L Account No.
Source Code
Description
SPIN EWA Code
8/17/2024 Invoice 119413 40850 PURCHASES Freight Expense - SO WENDYP...
8/17/2024 Invoice 119413 40850 PURCHASES Freight Expense - SO 111772 A...
8/17/2024 Invoice 119413 40850 PURCHASES Freight Expense - SO 112294 O...
8/17/2024 Invoice 119413 40850 PURCHASES WEEKLY PRINTER FEES
8/17/2024 Invoice 119413 40850 PURCHASES Freight Expense - SO ENG-22-...
8/17/2024 Invoice 119413 20000 PURCHASES Invoice 111796

Effective Permissions

Saved

General

User: TEST

Company: [redacted]

Show All Objects

Permission Sets | Permission Set by User

Permissions

Object ID	Object Type	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	In User-Defined Permission Set
3	Table Data	Payment Terms	Yes		Yes	Yes		
4	Table Data	Currency	Yes	Yes	Yes	Yes		
5	Table Data	Finance Charge Terms	Yes					
6	Table Data	Customer Price Group	Yes					
7	Table Data	Standard Text	Yes	Yes	Yes	Yes		
8	Table Data	Language	Yes	Yes	Yes	Yes		
9	Table Data	Country/Region	Yes	Yes	Yes	Yes		
10	Table Data	Shipment Method	Yes					
11	Table Data	Country/Region Translation	Yes	Yes	Yes	Yes		
13	Table Data	Salesperson/Purchaser	Yes					
14	Table Data	Location	Yes					
[redacted]	Table Data	G/L Account	Yes					
17	Table Data	G/L Entry	Yes	Indirect	Indirect	Indirect		
18	Table Data	Customer	Yes		Yes			
19	Table Data	Cust. Invoice Disc.	Yes	Yes	Yes	Yes		
21	Table Data	Cust. Ledger Entry	Yes	Indirect	Yes	Indirect		
23	Table Data	Vendor	Yes		Yes			

By Permission Set

Permission Set	Source	Type	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
SPI CSR - LIMITED	Normal	User-Defined	Yes					
→ _	**Entitlement**	System	Yes	Yes	Yes	Yes		

	13		Table Data	Salesperson/Purchaser	Yes				
	14		Table Data	Location	Yes				
→	15	⋮	Table Data	G/L Account	Yes				
	17		Table Data	G/L Entry	Yes	Indirect	Indirect	Indirect	
	18		Table Data	Customer	Yes		Yes		
	19		Table Data	Cust. Invoice Disc.	Yes	Yes	Yes	Yes	
	21		Table Data	Cust. Ledger Entry	Yes	Indirect	Yes	Indirect	
	23		Table Data	Vendor	Yes		Yes		

By Permission Set

	Permission Set		Source	Type ↑	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
	SPI CSR - LIMITED		Normal	User-Defined	Yes					
→	_	⋮	**Entitlement**	System	Yes	Yes	Yes	Yes		

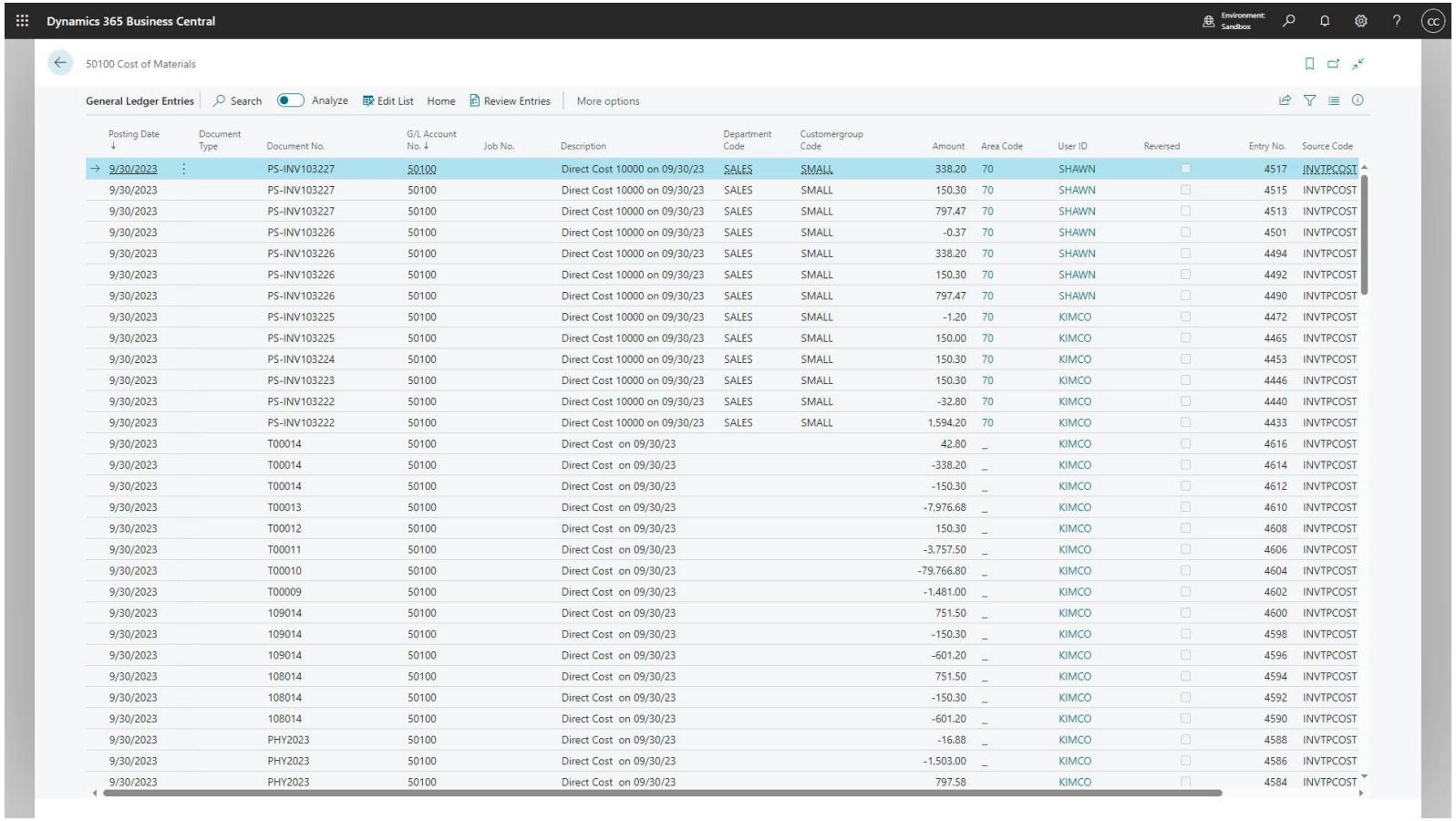
	14		Table Data	Location	Yes				
	15		Table Data	G/L Account	Yes				
→	17	⋮	Table Data	G/L Entry	Yes	Indirect	Indirect	Indirect	
	18		Table Data	Customer	Yes		Yes		
	19		Table Data	Cust. Invoice Disc.	Yes	Yes	Yes	Yes	
	21		Table Data	Cust. Ledger Entry	Yes	Indirect	Yes	Indirect	
	23		Table Data	Vendor	Yes		Yes		

By Permission Se

	Permission Set		Source	Type ↑	Read Permiss	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
	MGC GL ENTRY POST 1		Normal	User-Defined	Yes					G/L Entry: Entry No.=0
	MGC GL ENTRY POST 2		Normal	User-Defined	Indirect	Indirect				
	SPI CSR - LIMITED		Normal	User-Defined		Indirect	Indirect	Indirect		
→	_	⋮	**Entitlement**	System	Yes	Indirect	Indirect	Indirect		

How can I help finance find why their published income statement from last month changed?

Fields on General Ledger Entries



Posting Date	Document Type	Document No.	G/L Account No.	Job No.	Description	Department Code	Customergroup Code	Amount	Area Code	User ID	Reversed	Entry No.	Source Code
9/30/2023		PS-INV103227	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	338.20	70	SHAWN		4517	INVTPCOST
9/30/2023		PS-INV103227	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	150.30	70	SHAWN		4515	INVTPCOST
9/30/2023		PS-INV103227	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	797.47	70	SHAWN		4513	INVTPCOST
9/30/2023		PS-INV103226	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	-0.37	70	SHAWN		4501	INVTPCOST
9/30/2023		PS-INV103226	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	338.20	70	SHAWN		4494	INVTPCOST
9/30/2023		PS-INV103226	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	150.30	70	SHAWN		4492	INVTPCOST
9/30/2023		PS-INV103226	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	797.47	70	SHAWN		4490	INVTPCOST
9/30/2023		PS-INV103225	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	-1.20	70	KIMCO		4472	INVTPCOST
9/30/2023		PS-INV103225	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	150.00	70	KIMCO		4465	INVTPCOST
9/30/2023		PS-INV103224	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	150.30	70	KIMCO		4453	INVTPCOST
9/30/2023		PS-INV103223	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	150.30	70	KIMCO		4446	INVTPCOST
9/30/2023		PS-INV103222	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	-32.80	70	KIMCO		4440	INVTPCOST
9/30/2023		PS-INV103222	50100		Direct Cost 10000 on 09/30/23	SALES	SMALL	1,594.20	70	KIMCO		4433	INVTPCOST
9/30/2023		T00014	50100		Direct Cost on 09/30/23			42.80	_	KIMCO		4616	INVTPCOST
9/30/2023		T00014	50100		Direct Cost on 09/30/23			-338.20	_	KIMCO		4614	INVTPCOST
9/30/2023		T00014	50100		Direct Cost on 09/30/23			-150.30	_	KIMCO		4612	INVTPCOST
9/30/2023		T00013	50100		Direct Cost on 09/30/23			-7,976.68	_	KIMCO		4610	INVTPCOST
9/30/2023		T00012	50100		Direct Cost on 09/30/23			150.30	_	KIMCO		4608	INVTPCOST
9/30/2023		T00011	50100		Direct Cost on 09/30/23			-3,757.50	_	KIMCO		4606	INVTPCOST
9/30/2023		T00010	50100		Direct Cost on 09/30/23			-79,766.80	_	KIMCO		4604	INVTPCOST
9/30/2023		T00009	50100		Direct Cost on 09/30/23			-1,481.00	_	KIMCO		4602	INVTPCOST
9/30/2023		109014	50100		Direct Cost on 09/30/23			751.50	_	KIMCO		4600	INVTPCOST
9/30/2023		109014	50100		Direct Cost on 09/30/23			-150.30	_	KIMCO		4598	INVTPCOST
9/30/2023		109014	50100		Direct Cost on 09/30/23			-601.20	_	KIMCO		4596	INVTPCOST
9/30/2023		108014	50100		Direct Cost on 09/30/23			751.50	_	KIMCO		4594	INVTPCOST
9/30/2023		108014	50100		Direct Cost on 09/30/23			-150.30	_	KIMCO		4592	INVTPCOST
9/30/2023		108014	50100		Direct Cost on 09/30/23			-601.20	_	KIMCO		4590	INVTPCOST
9/30/2023		PHY2023	50100		Direct Cost on 09/30/23			-16.88	_	KIMCO		4588	INVTPCOST
9/30/2023		PHY2023	50100		Direct Cost on 09/30/23			-1,503.00	_	KIMCO		4586	INVTPCOST
9/30/2023		PHY2023	50100		Direct Cost on 09/30/23			797.58		KIMCO		4584	INVTPCOST

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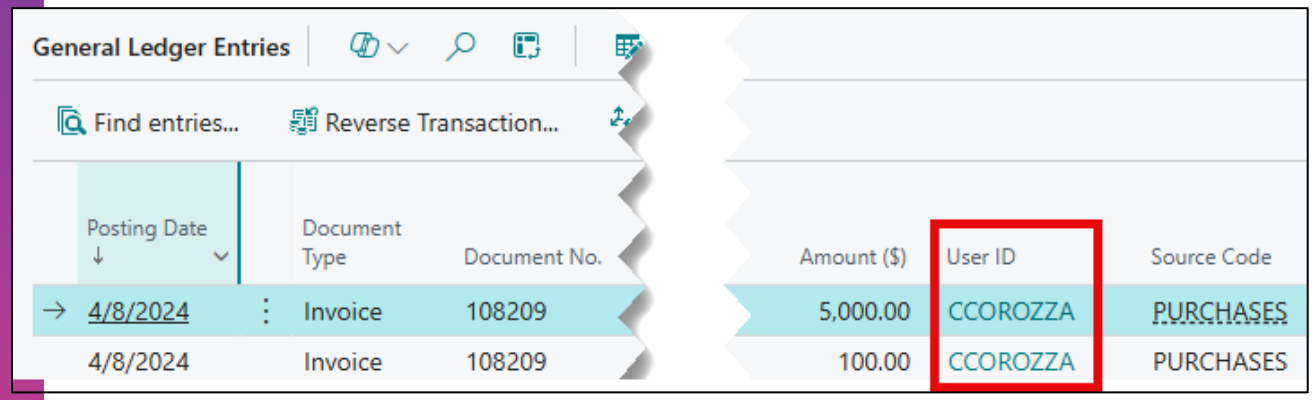
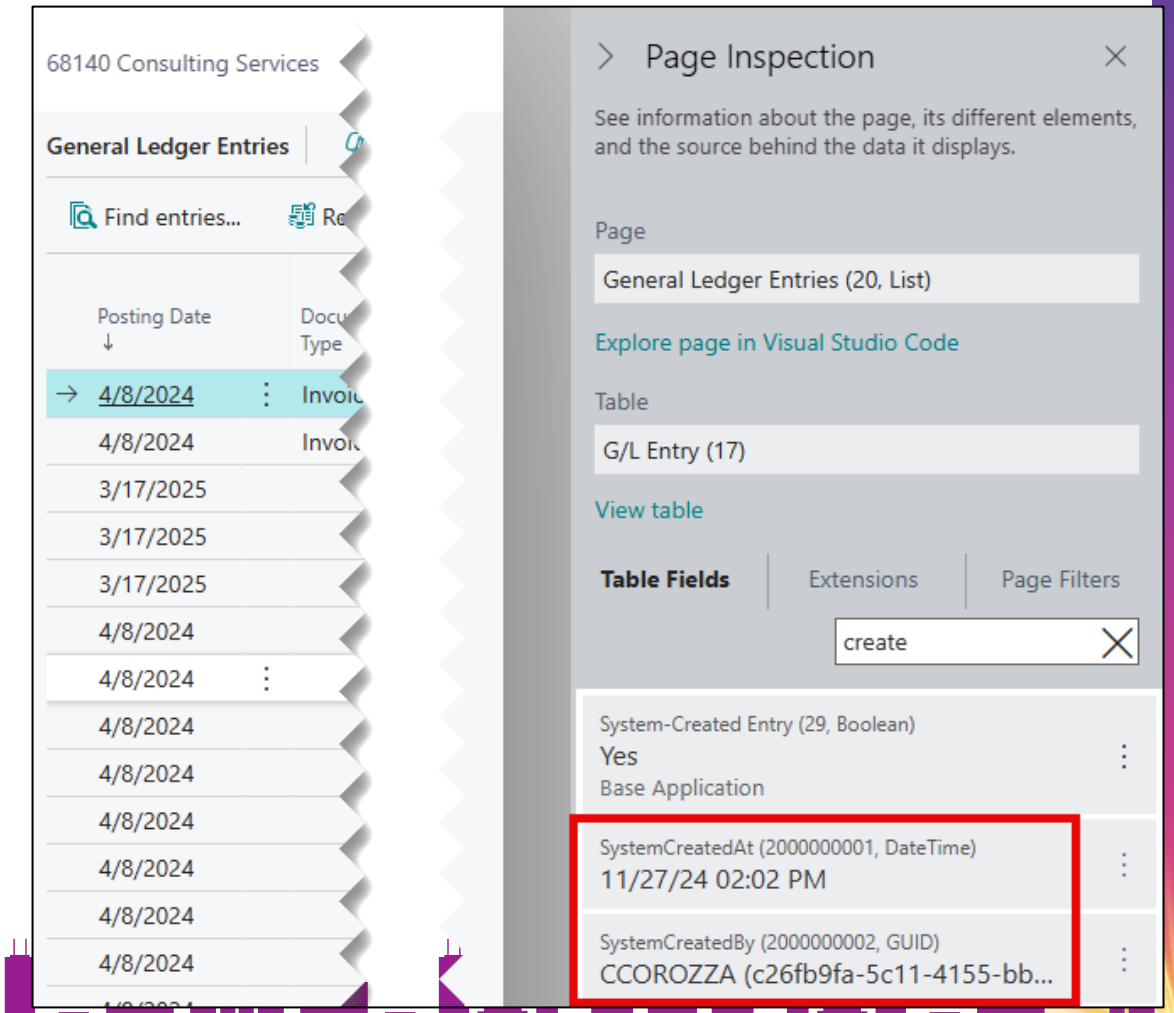
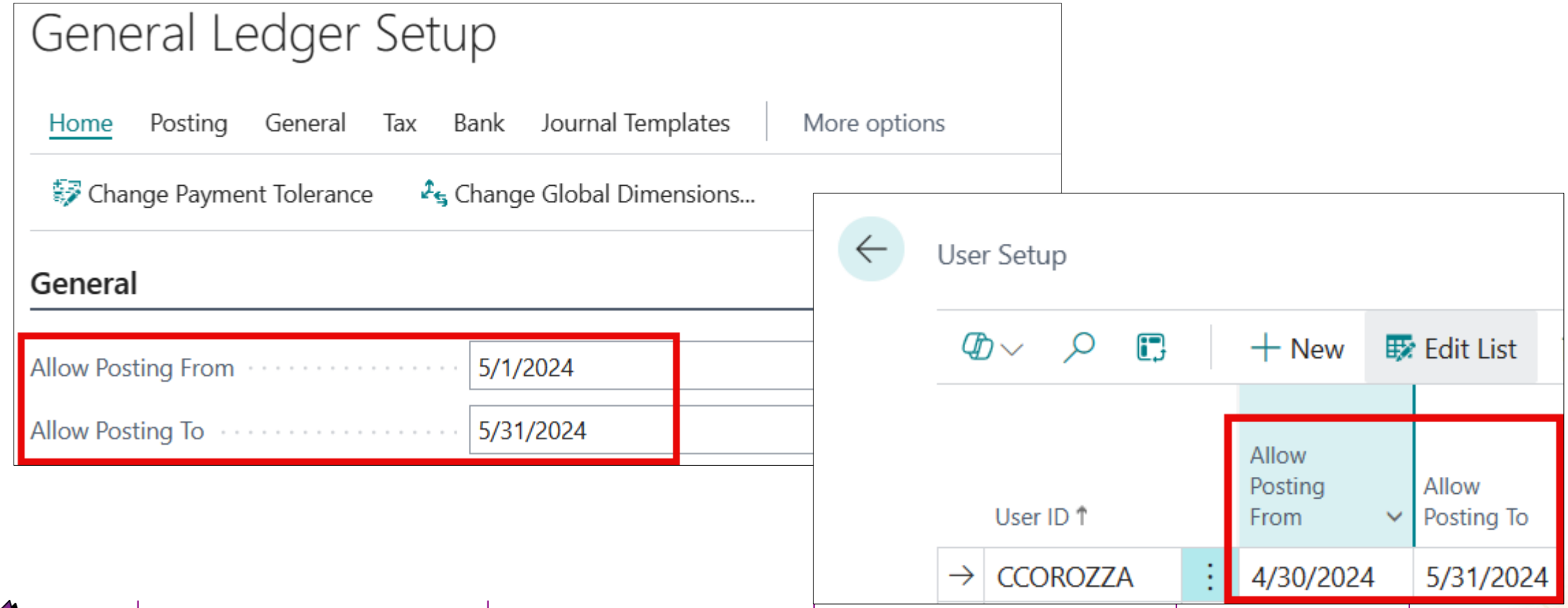
Other ways to Identify User and Date





Posting Date Control



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Changes in BC happen so fast! How can I keep up to date?

Relea

Dynamics 365 and Microsoft Power Platform

Release planner

All release plans | My release plans

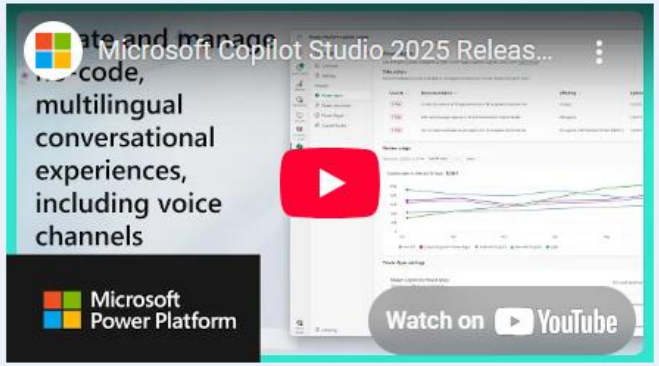
Dynamics 365

- Dynamics 365 Sales
- Dynamics 365 Commerce
- Dynamics 365 Customer Insights - Data
- Dynamics 365 Customer Insights - Journeys
- Dynamics 365 Customer Service
- Dynamics 365 Contact Center
- Dynamics 365 Field Service
- Finance and operations cross-app capabilities
- Dynamics 365 Financ
- Dynamics 365 Project erations
- Dynamics 365 Human sources
- Dynamics 365 Supply ain Management
- Dynamics 365 Business Central

Community links

Watch the new highlights!

Microsoft Copilot Studio 2025 release wave 1



For previous release wave highlight videos:

- 2024 release wave 2
- 2024 release wave 1

For archived plans:

- Release Plans Dynamics 365 and Power Platform - Dynamics 365 | Microsc

All
15 features included in release plans

Planned
15 upcoming features included in release plans

Coming soon
7 upcoming features available th

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Dynamics 365 and Microsoft Power Platform

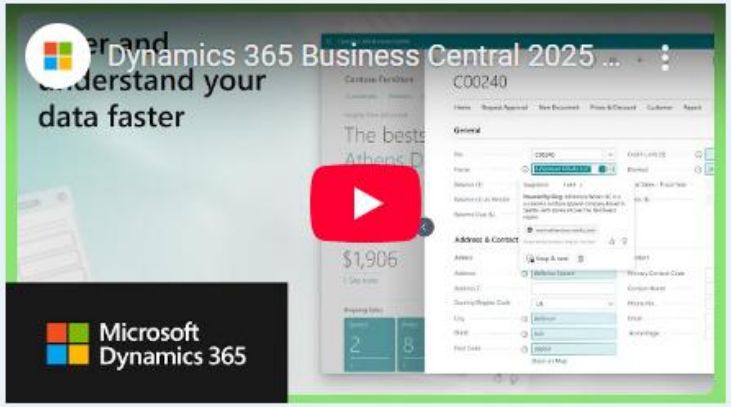
Release planner

All release plans | My release plans

- Dynamics 365
- Power Platform
- Role-based Copilots
- Quick links

Watch the new highlights!

Dynamics 365 Business Central 2025 release wave 1



For archived plans:

- Release Plans Dynamics 365 and Power Platform - Dynamics 365 | Microsoft Learn

All	Planned	Coming soon	Try now
125 features included in release plans	125 upcoming features included in release plans	95 upcoming features available this month	3 new features recently released to market

Microsoft **Release Planner** Products Solutions Pricing Partners Platform Resources Support Community Cynthia Priebe English

Dynamics 365 Supply Chain Management

Dynamics 365 Business Central

Community links

Power Platform

Role-based Copilots

Quick links

Application

Copilot and AI

Country and regional

Development

E-commerce

E-Documents

Financial Management

Governance and administration

Reporting and data analysis

Access report and request metadata in Word layouts	General Availability	Apr 2025
Add fields from related tables in analysis mode	Public Preview	Jun 2025
Enhance reports with PDF post-processing capabilities	General Availability	Apr 2025
Use enhanced analytics for manufacturing	General Availability	May 2025
Use enhanced Financial Reporting capabilities	General Availability	Apr 2025

Add fields from related tables in analysis mode

Public Preview
Jun 2025

Share

Business Value

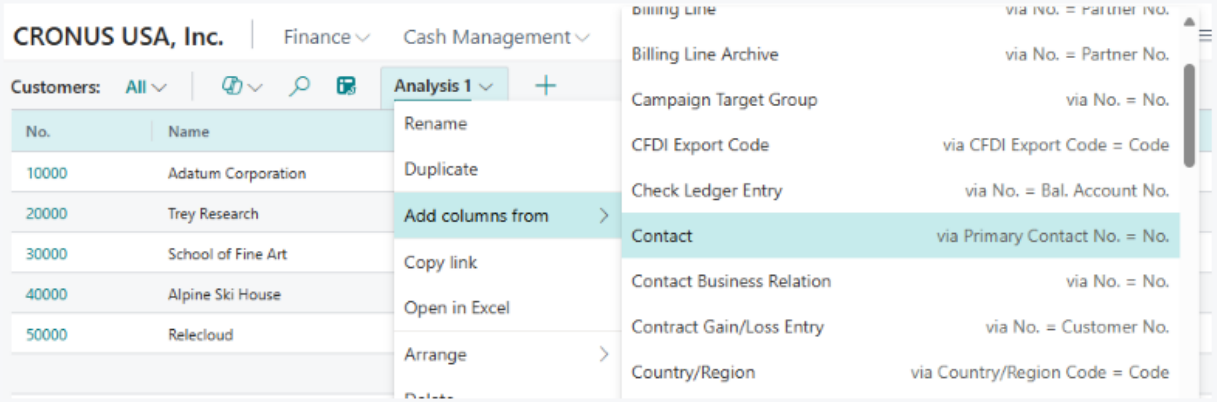
Analysis mode is a powerful experience that lets you create and analyze data views easily. You can also use Copilot and natural language to create views. This release lets you add fields from related tables to an analysis mode tab, including grouping by these fields for advanced data analysis.

Feature Details

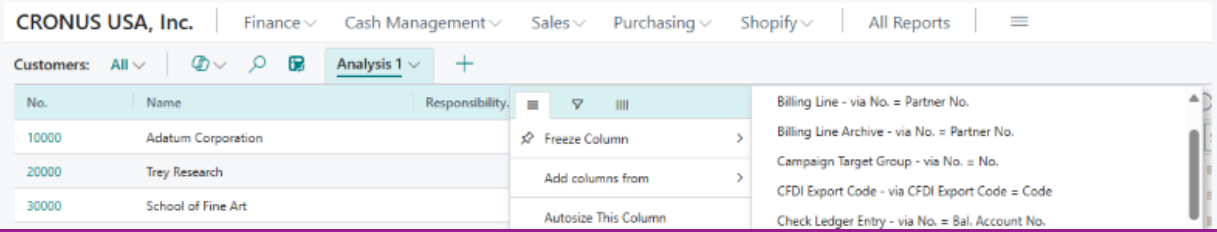
You can add fields from related tables in analysis mode tabs in two ways:

Show less

- From the context menu **Add columns from** on an analysis mode tab. This inserts the fields as new columns at the end of the view.



- From the context menu **Add columns from** on an analysis mode column. This inserts the fields as new columns to the right.



Timelines:

- Early Access: ---
- Public Preview: **Jun 2025**
- General Availability : **Jun 2025**

Last updated: Mar 13, 2025

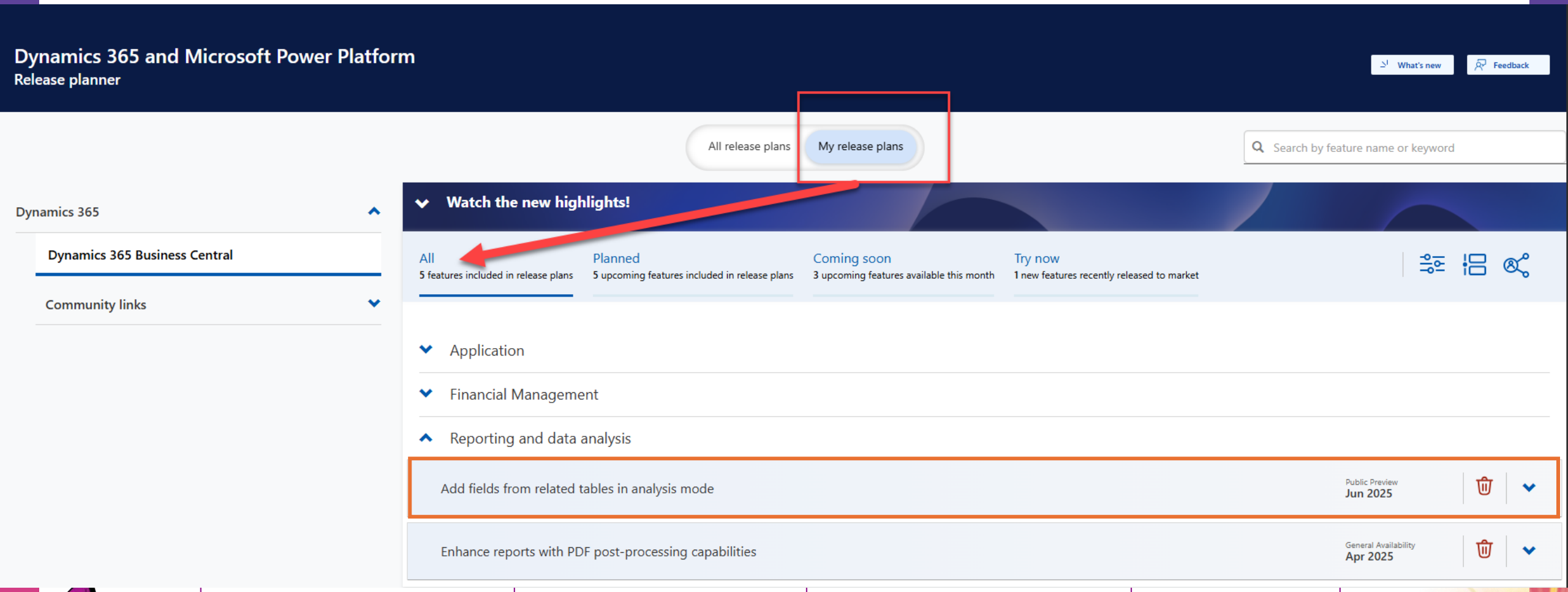
Included in:

2025 release wave 1

Enabled for:

Users, automatically

My Release Plans



Microsoft | Dynamics 365 Community

Forums | Blogs | User groups | Galleries | Ideas | Resources | Search | Sign in

- **Customer experience** | Sales, Customer Insights, CRM
- **Service** | Customer Service, Contact Center, Field Service, Guides
- **Supply chain** | Supply Chain Management, Commerce
- **Finance** | Project Operations, Human Resources, AX, GP, SL
- **Small and medium business** | Business Central, NAV, RMS
- **Microsoft Dynamics 365** | Integration, Dataverse, and general topics
- **Microsoft Cloud for Sustainability** | MSM, SDSF, ECS, EID, ESG
- **Archived topics** | Read-only forums of past discussions

estival 2025 Challenge & Updates

Dynamic

Get

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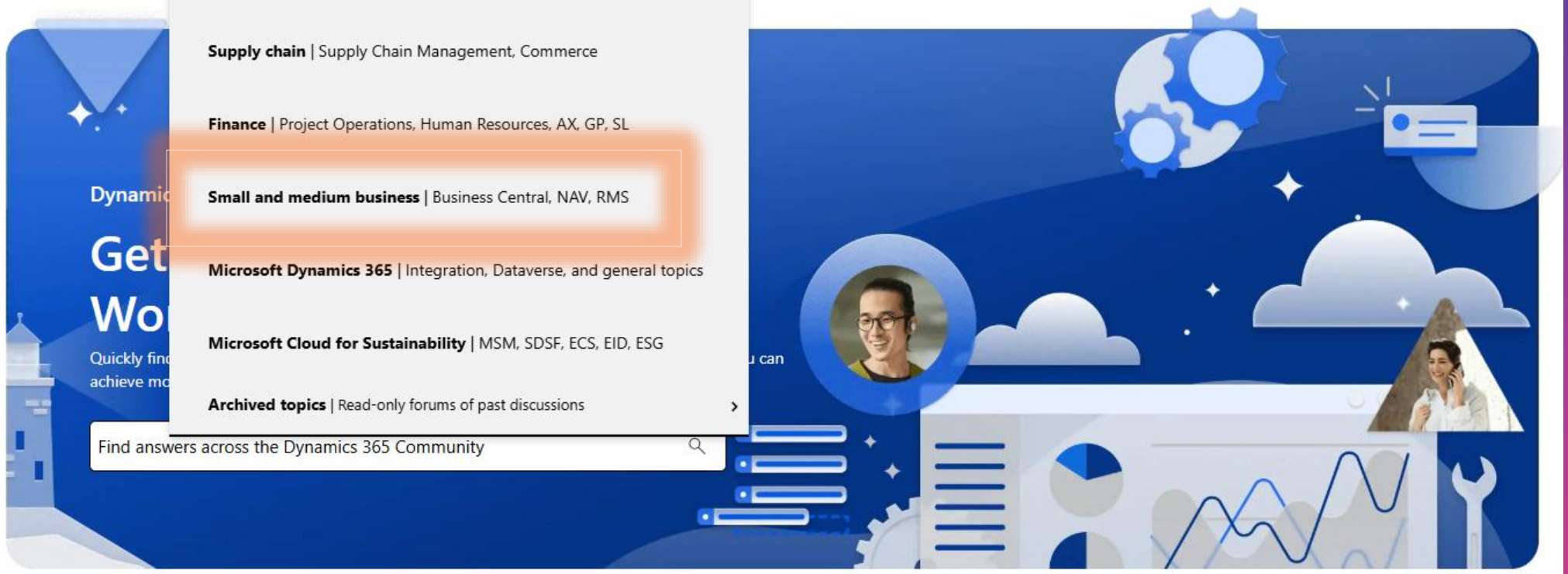
Quickly find

achieve mo

u can

Find answers across the Dynamics 365 Community



Explore Dynamics 365 forums

Explore the discussion forums, find answers to your questions, and connect with peers and experts.

Quick links

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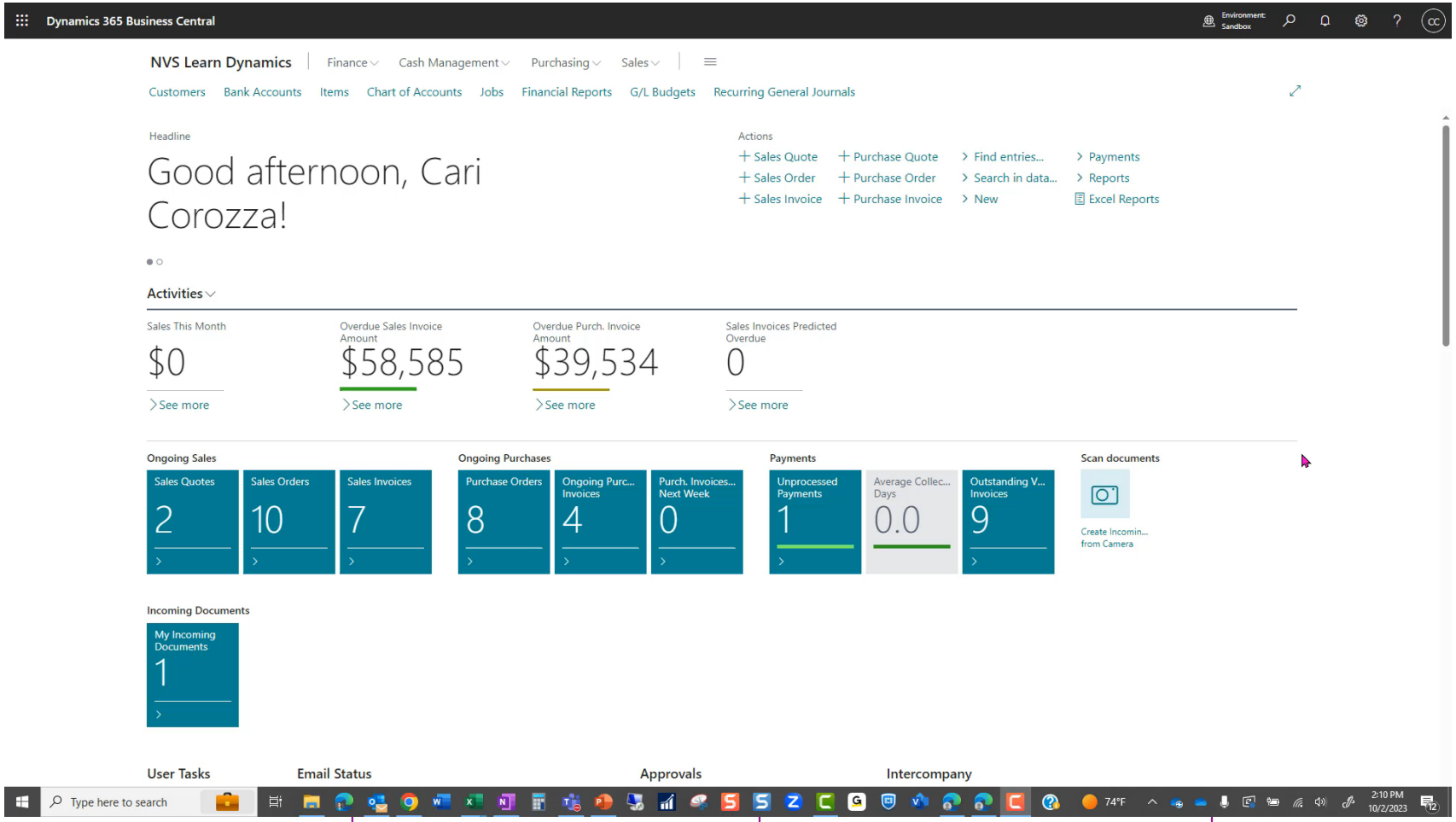
BC Ideas


Dynamics 365 Business Central
Environment: Sandbox
NVS Learn Dynamics
Finance
Cash Management
Purchasing
Sales
Customers
Bank Accounts
Items
Chart of Accounts
Jobs
Financial Reports
G/L Budgets
Recurring General Journals
Headline
Good afternoon, Cari Corozza!
Actions
Sales Quote
Purchase Quote
Find entries...
Payments
Sales Order
Purchase Order
Search in data...
Reports
Sales Invoice
Purchase Invoice
New
Excel Reports
Activities
Sales This Month
$0
See more
Overdue Sales Invoice Amount
$58,585
See more
Overdue Purch. Invoice Amount
$39,534
See more
Sales Invoices Predicted Overdue
0
See more
Ongoing Sales
Sales Quotes
2
Sales Orders
10
Sales Invoices
7
Ongoing Purchases
Purchase Orders
8
Ongoing Purc... Invoices
4
Purch. Invoices... Next Week
0
Payments
Unprocessed Payments
1
Average Collec... Days
0.0
Outstanding V... Invoices
9
Scan documents
Create Incomin... from Camera
Incoming Documents
My Incoming Documents
1
User Tasks
Email Status
Approvals
Intercompany
Type here to search
74°F
2:10 PM
10/2/2023

2025
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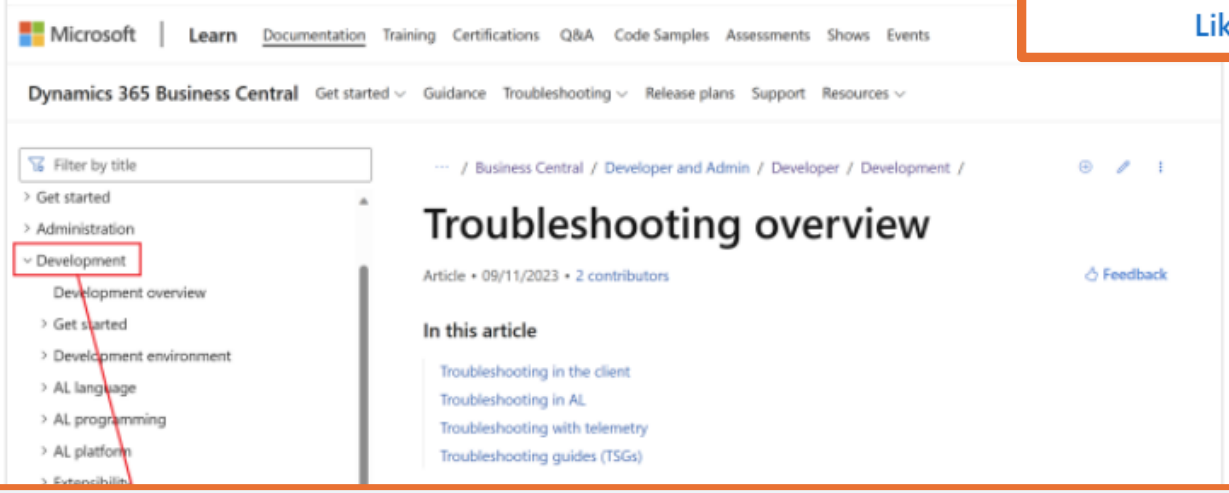
Cynthia Priebe • You
Senior Consultant & Trainer | Microsoft Certified D365 Business Ce...
1d • Edited •

Kennie Nybo Pontoppidan, so nice to see all of this in one place in Learn.microsoft.com

Cari Corozza, CPA and I have been doing sessions on troubleshooting for the user and functional consultants at user groups meetings for couple of years. They are always well attended. Developers aren' ones that need to troubleshoot!

Kennie Nybo Pontoppidan • Following
Principal Program Manager at Microsoft
1d •

Need to troubleshoot issues in D365 Business Central? Then ch our new overview article



Add a comment...

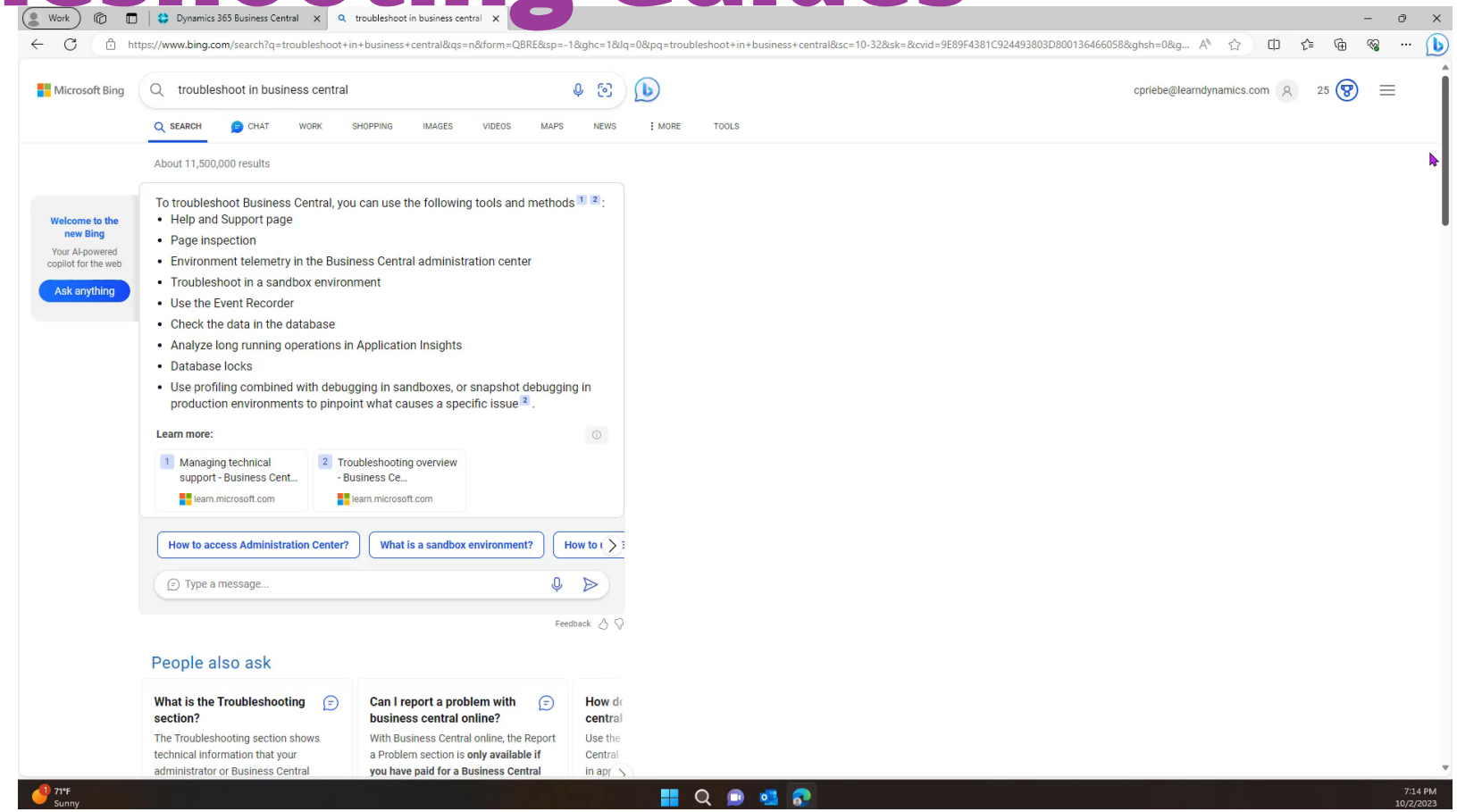
Most relevant

Kennie Nybo Pontoppidan • Following
Principal Program Manager at Microsoft
1d •

Super cool to hear that. Let us know if there are areas where a TSG would be helpful

Like · 1 | Reply

Troubleshooting Guides



Bookmark it!

Microsoft Dynamics 365 - Release Plans

Troubleshooting overview - Business Central | Microsoft Learn

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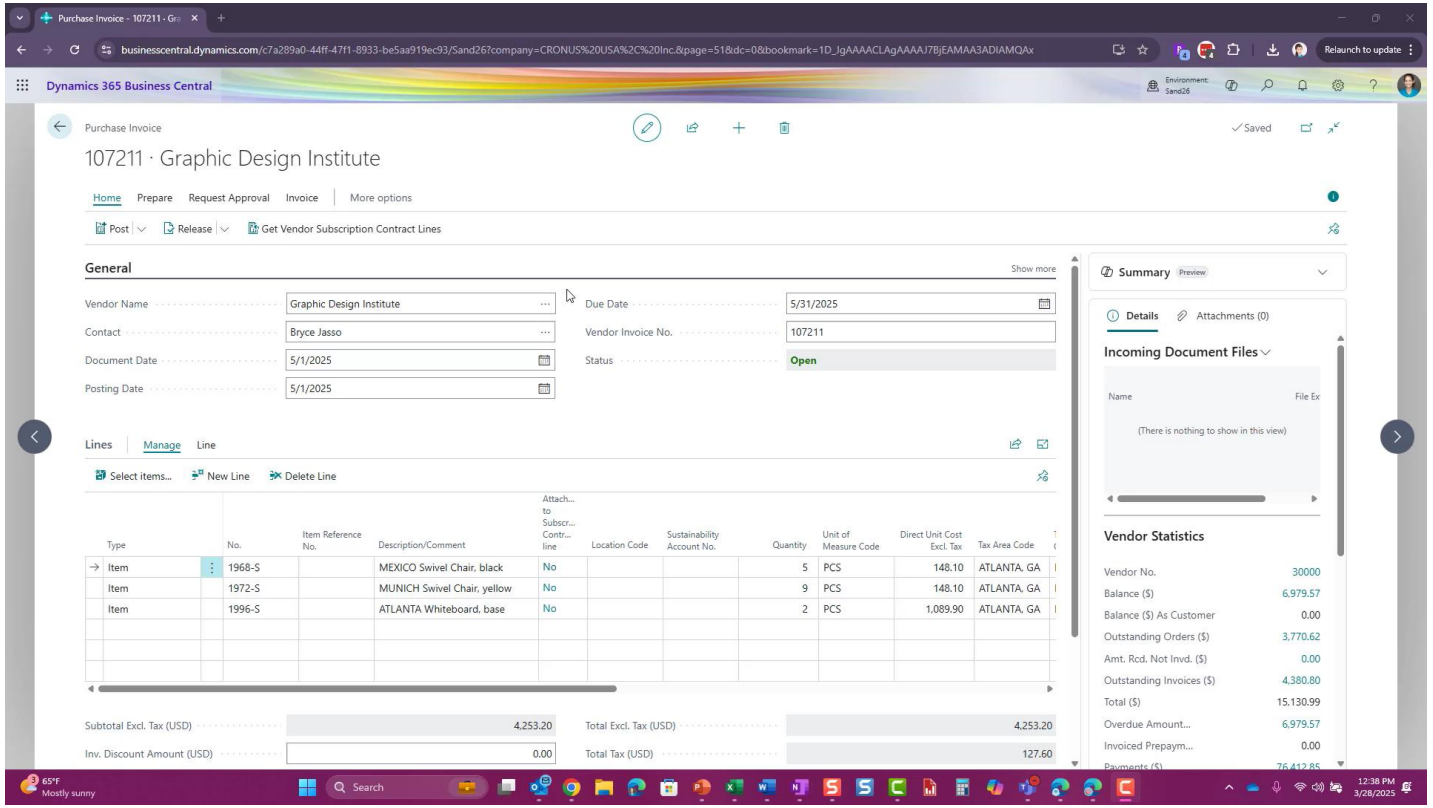
BONUS!

Prevent user questions before they occur with new features

Purchase Document Amount Check

Purchase Document Check



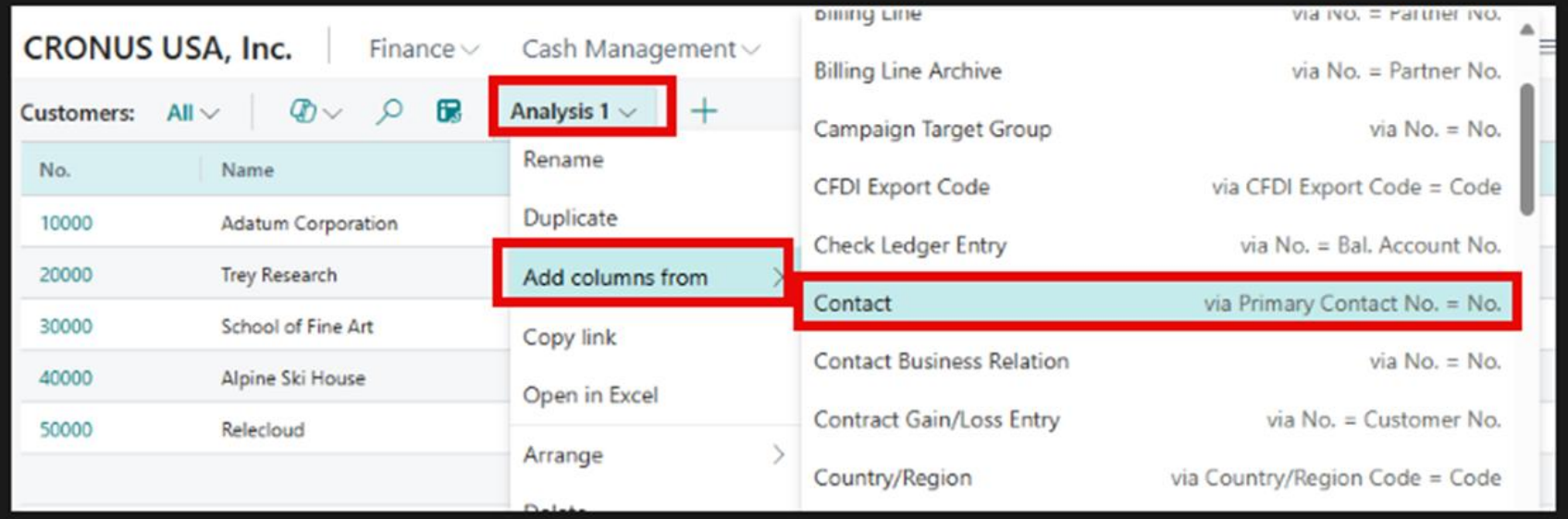
Extra Columns in Analysis View

Add Fields from Related Tables

Enabled for	Public preview	General availability
Users, automatically	Jun 2025	Jun 2025

Add Fields from Related Tables

- From the context menu **Add columns from** on an analysis mode tab. This inserts the fields as new columns at the end of the view.



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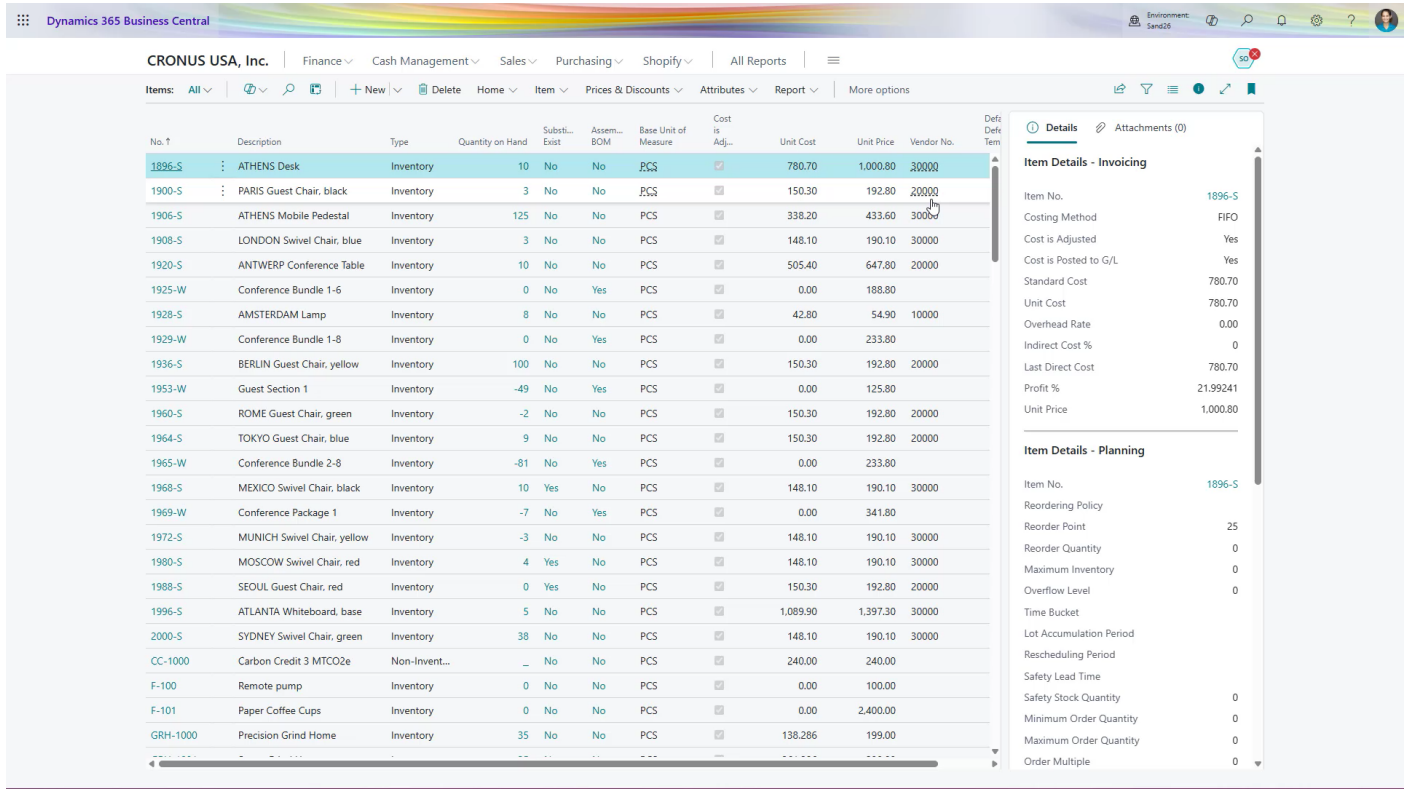
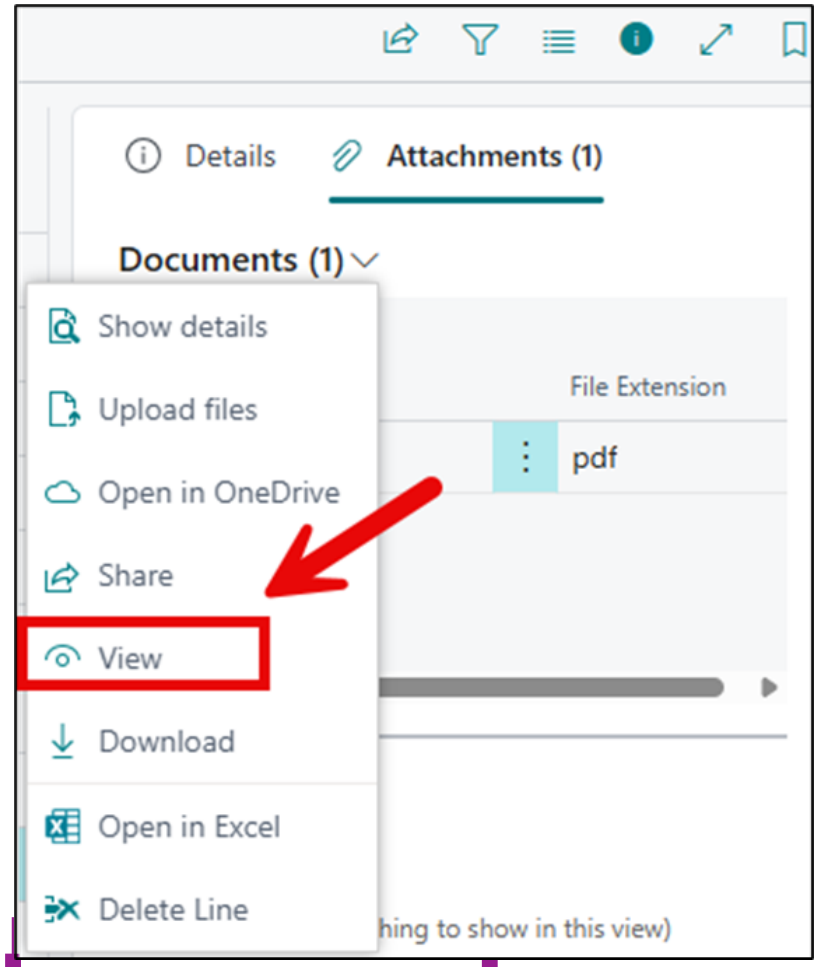
FactBox changes

Resize Factboxes



PDF in one step!

View PDF Attachments



Thank you for attending!

Cynthia Priebe
MGC Group, LLC
Cynthia@Cynthiapriebe.com

Cari Corozza
New View Strategies
Cari@getyournewview.com

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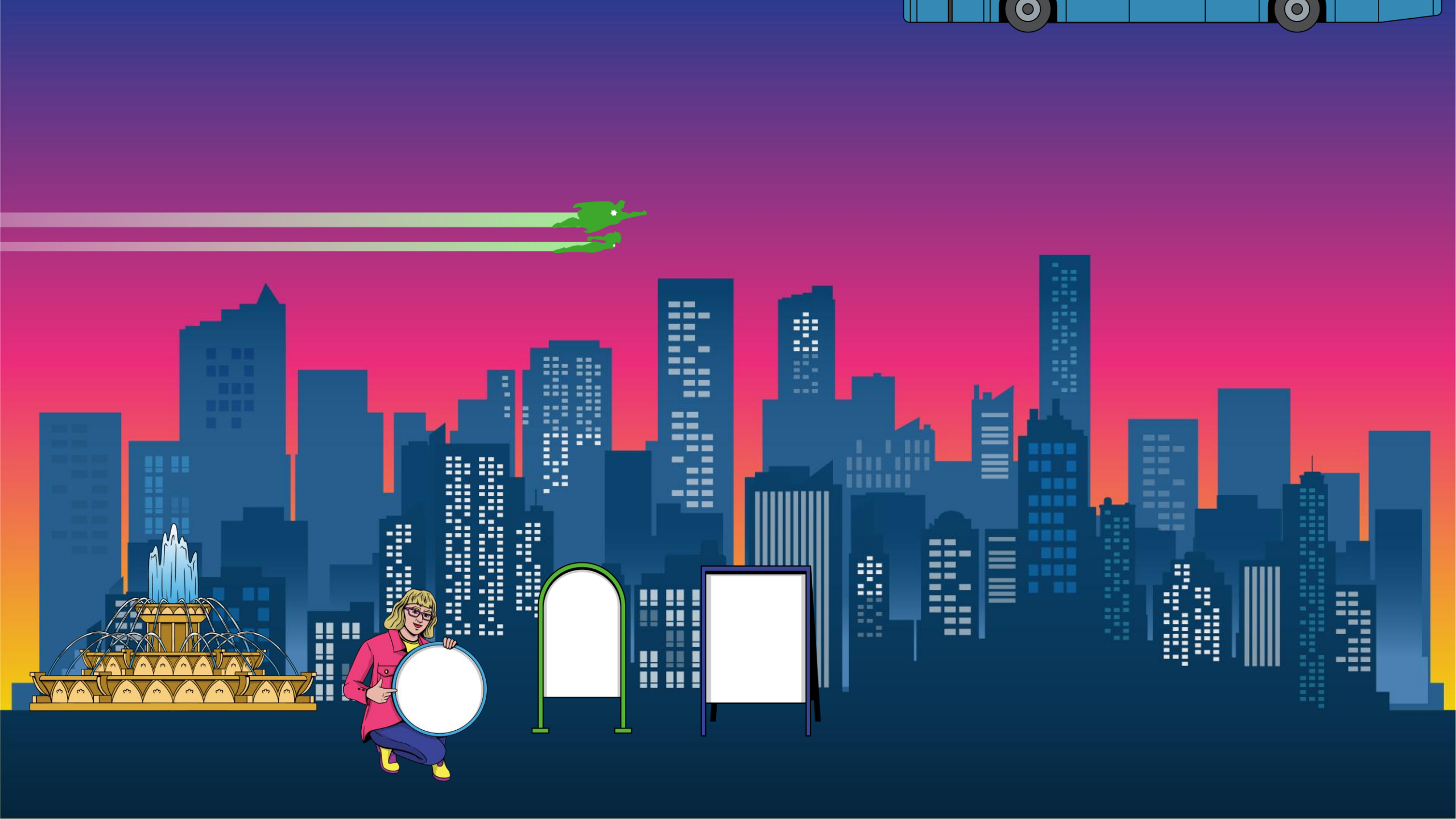

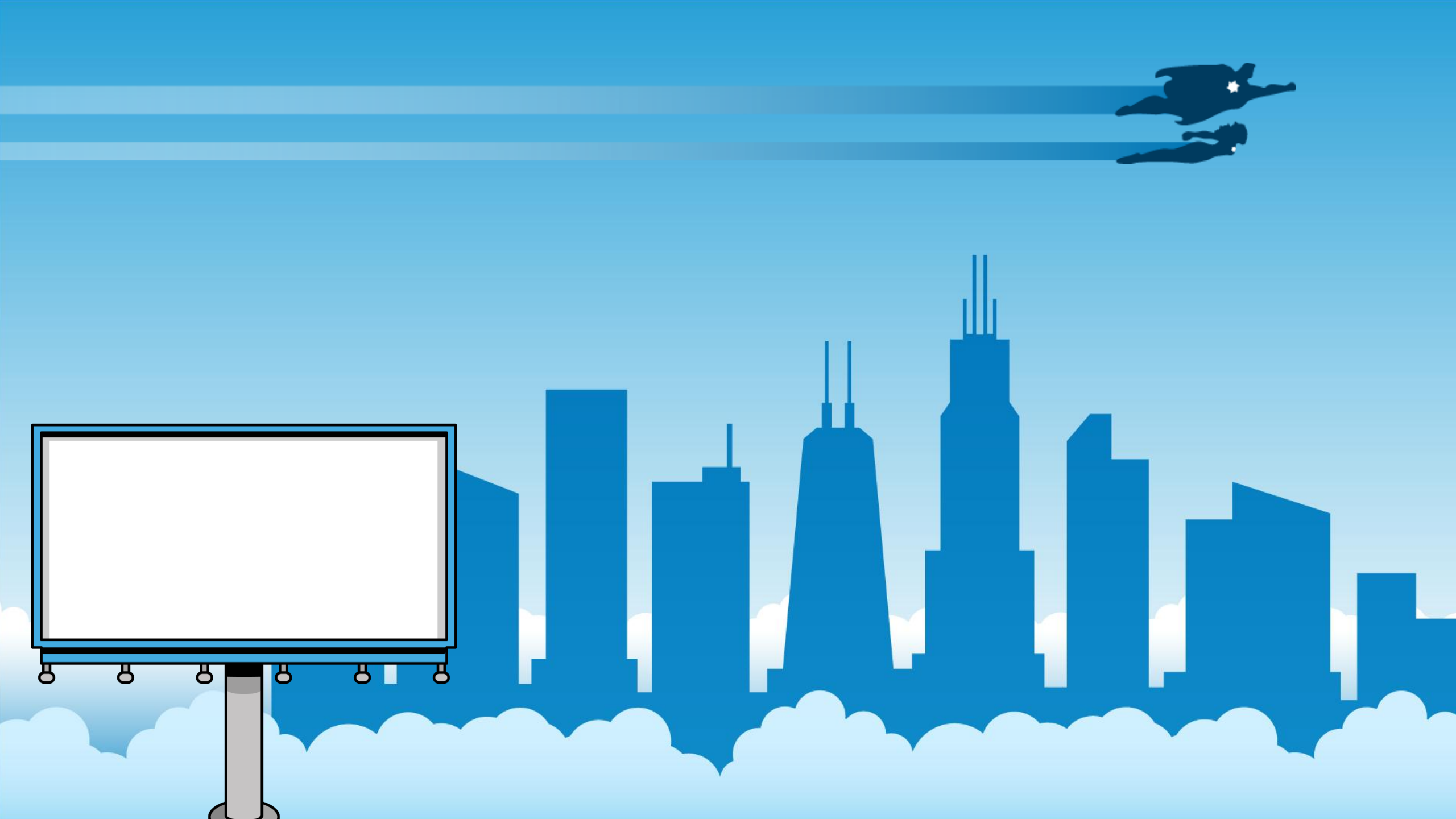

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