



# 2026 DYNAMICS CON

Vegas

The main title is presented in a vibrant, multi-colored, comic-style font. '2026' is in green, 'DYNAMICS' is in yellow and green, and 'CON' is in yellow. Below it, 'Vegas' is written in a white cursive font with a black outline. The text is set against a background of colorful, overlapping geometric shapes in shades of purple, blue, and pink, with two stylized palm trees.

# Configuring BC for non-Developers



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- 24 years working with Business Central
- Mechanical Engineer
- Microsoft Certified Trainer
- Love to Sail



LIBERTY GROVE SOFTWARE

2026  
DYNAMICS  
CON



# Learning Objectives

- Learn how to adjust BC to your needs
- Explore options for report customizations
- Touch on Agent configuration



# Agenda

- What are some common requests
- Pages – Personalization vs. Configuration
- Pages – Adding fields
- Reports – Customizing Report Layouts
- Reports – PowerBI Options
- Agents – Walkthrough the agent tool



# Common Requests?



# Common Requests

- The screen is too cluttered
- I don't need that factbox
- The field I need is not showing
- The field I need is not available to personalize
- I need to "brand" my documents
- I need to enhance my reports
- I need a dashboard with additional things
- I need to streamline my work



# Pages



# Pages – Personalize

- Tied to the individual user
- Add/remove elements
  - Fields (exposed by developers)
  - Factboxes
  - Re-arrange the menu



# Pages – Configuration

- Tied to a Role/Profile
- Add/remove elements
  - Any Fields
  - Factboxes
  - Actions
  - Re-arrange the menu



# Reports



# Reports – Word Layouts

- Many reports are being re-built with default Word (and/or Excel) Layouts
  - Excel - Inventory Top 10 List (711), Inventory - Transaction Detail (704)
  - Word – Inventory Order Details (708), GTIN (6625)
- There is a Word Add-In for Business Central Reports (updated recently)



# Reports – Word Layouts

- Steps to edit...



# Reports – Excel Layouts

- Great way to add/change Excel Layout
  - Run Report
  - Edit Excel file
  - Save it as a new layout



# Reports – Custom Report Layouts & Document Layouts

- Customer Report Layouts - Set the company/organization's default by report and its use
- Document Layouts – Customer/Vendor Specific layouts



# PowerBI



# PowerBI – Microsoft Apps

- Finance
- Sales
- Purchasing
- Inventory
- Inventory Valuation
- Projects
- Manufacturing
- Subscription Billing
- Sustainability



# PowerBI – Extending Apps

- Microsoft has now made the PowerBI App logic available to be extended.
  - Use the existing dataset from the Finance app
  - Create a new report from that dataset



# Agents

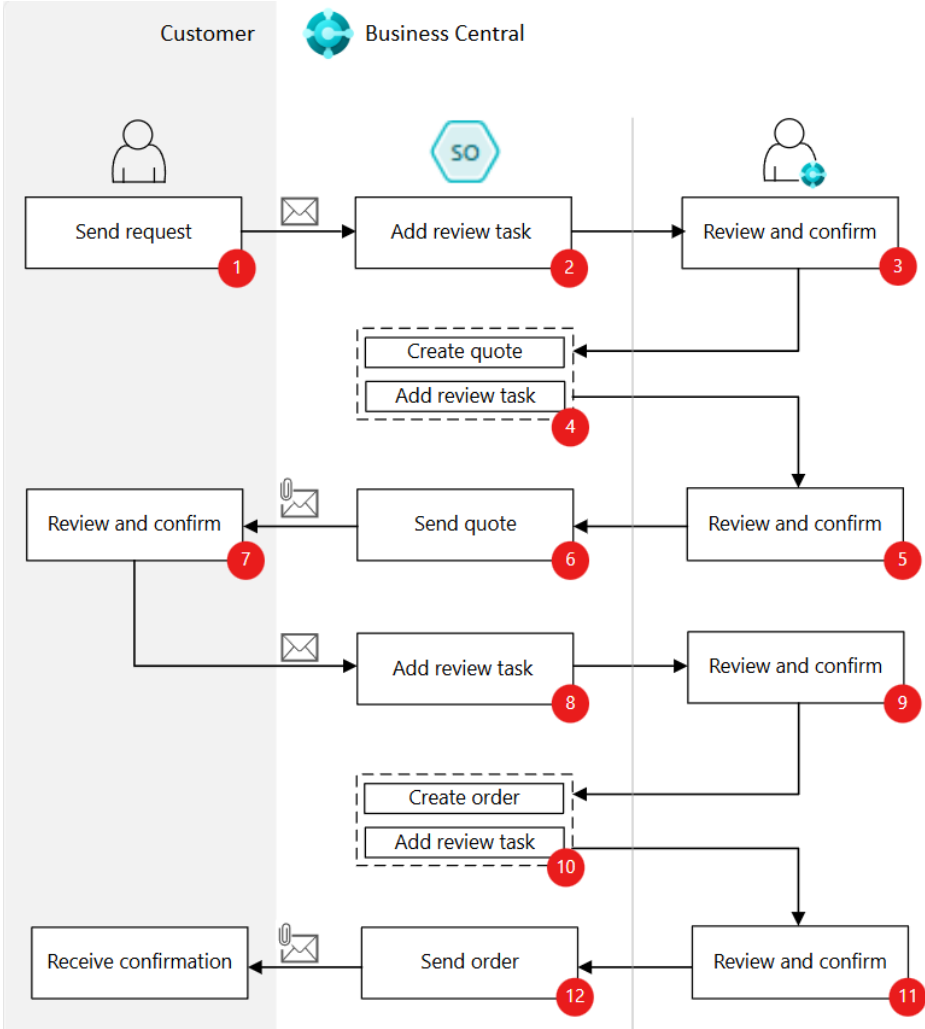


# Agents – Pre-Configured

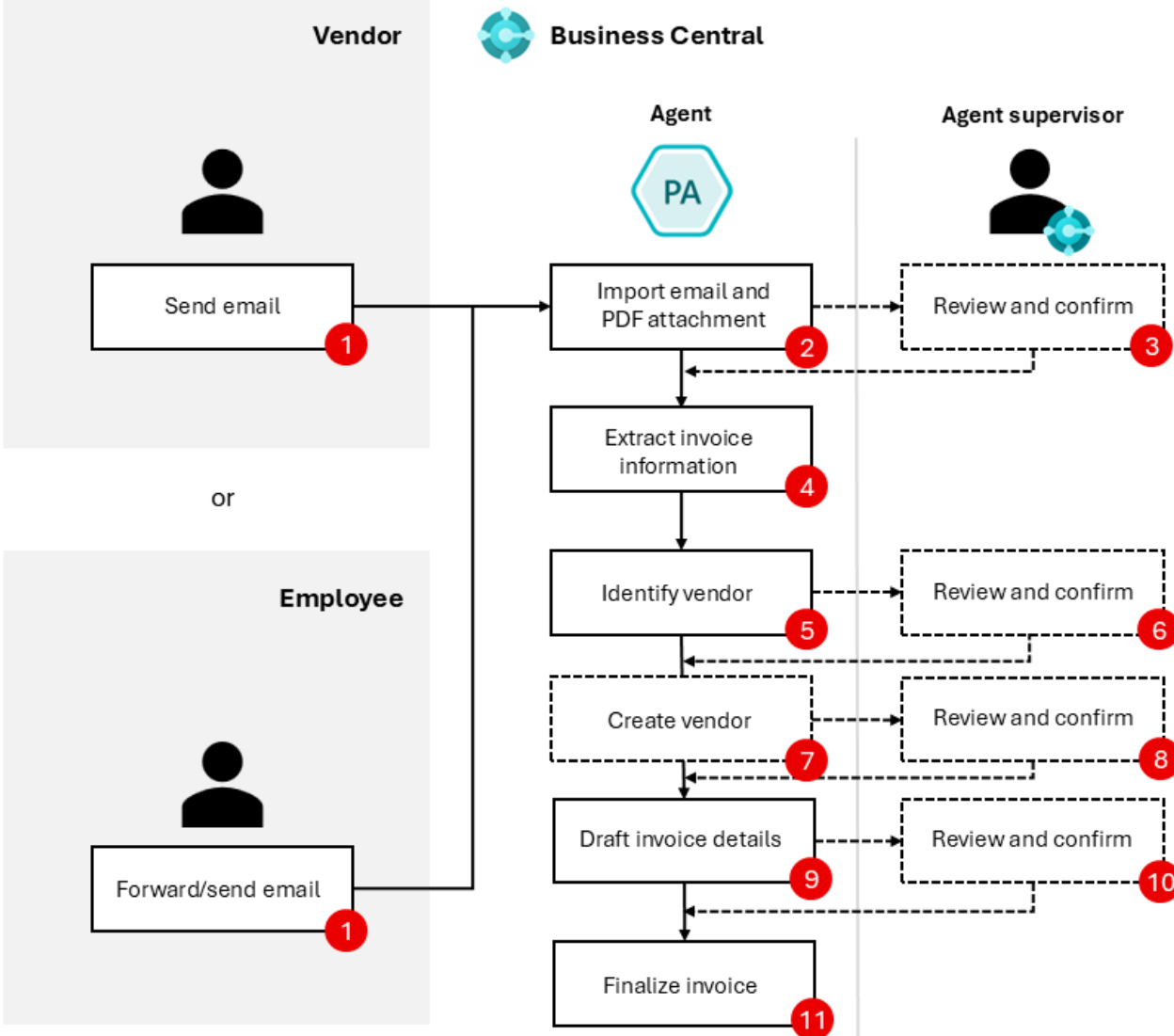
- Sales Order Agent
- Payables Agent
- Expense Agent (future)



# Agents – Sales Order



# Agents – Payables

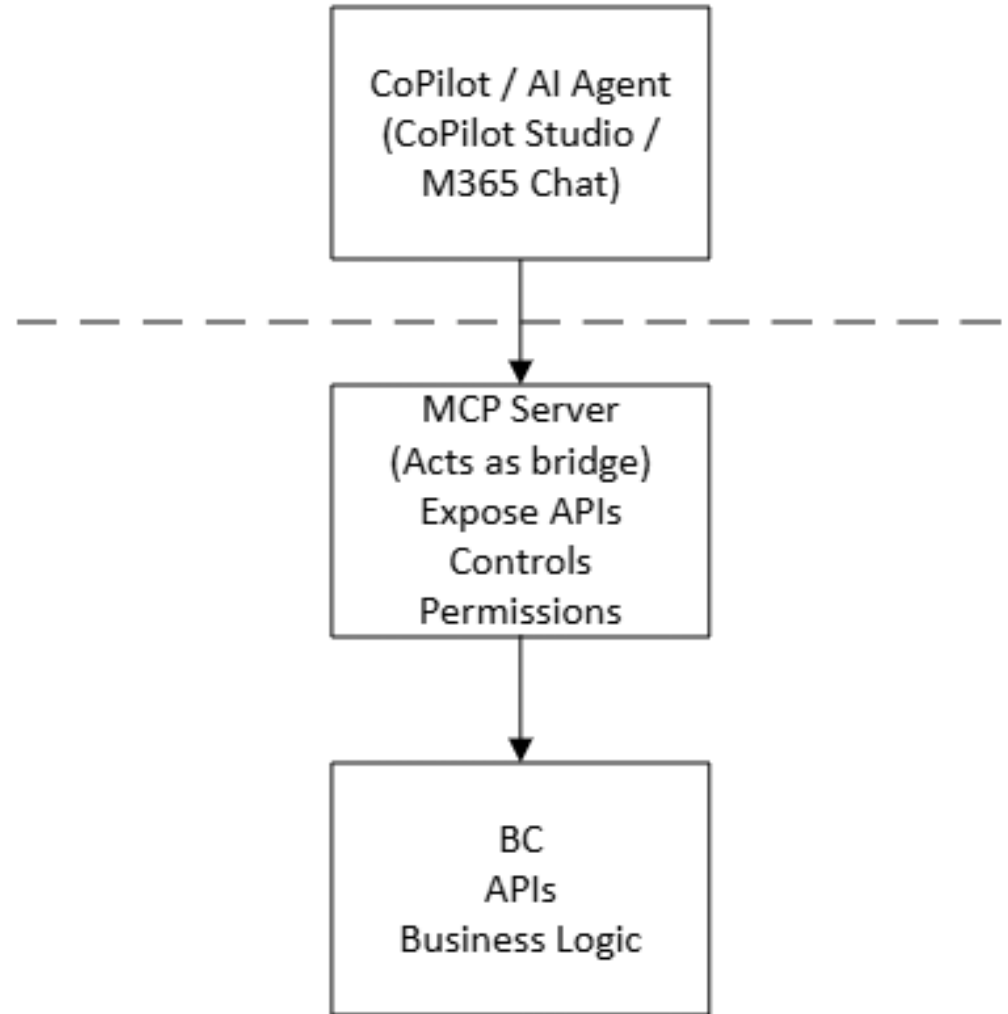


# Agents – Configurable

- Available in 27.5



# Agents – MCP Server



# References



# References

- [Centralq.ai](https://centralq.ai) - BC Questions
- <https://learn.microsoft.com/en-us/dynamics365/business-central/ui-how-add-fields-word-report-layout> - Word Layouts
- <https://learn.microsoft.com/en-us/dynamics365/business-central/ui-excel-report-layouts?toc=%2Fdynamics365%2Fbusiness-central%2Fdev-itpro%2Ftoc.json&tabs=any-report> – Excel Layouts
- <https://learn.microsoft.com/en-us/dynamics365/business-central/across-powerbi-apps-faq> - PowerBI FAQ



# Thank You!

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Feedback



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Contact



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