

When the next step matters

Start with the expense report, not the agent

Expense management is a production-ready preview, subject to supplemental preview terms. It is not confirmed generally available.

First decide whether the business needs structured manual reports or receipt capture. Without Expense Agent, users enter lines directly on expense reports; there are no individual expense records or automatic receipt extraction. Itemization, participants, mileage, per diem, rules and approval workflows remain available. Approval workflows are optional without the agent; with the agent, its built-in web-app approval process applies. Get Expense Line retrieves existing released expenses only when the agent is enabled.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[Expense Management Overview in Business Central - Business Central | Microsoft Learn](#)

[Create and Submit Expense Reports - Business Central | Microsoft Learn](#)

Keep release, approval and reimbursement separate

A report status is a processing step, not proof that the employee has been paid.

Assign responsibility for each step. Releasing a report locks it for editing; it does not establish approval, posting or payment. Rule violations remain visible to the approver but do not block submission. A rejected report can be reopened, corrected, released and resubmitted. Policy eligibility is also different from reimbursement: an eligible company-card cost is not money owed to the employee. If VAT reclaim is enabled, an accountant must approve or reject every suggestion before posting and remains responsible for the tax decision. Expense Agent does not post or reimburse.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[Expense Management Overview in Business Central - Business Central | Microsoft Learn](#)

[Create and Submit Expense Reports - Business Central | Microsoft Learn](#)

[Responsible AI FAQ for Expense Agent \(preview\) - Business Central | Microsoft Learn](#)

Optional technical notes: Expense access, credits and data geography

Check the planned users and processing route before an agent pilot.

Expense entry and approval inside Business Central require at least Team Member; posting and payment processing require Essentials or Premium. Receipt submission solely through the agent web app or email needs no BC licence but consumes Copilot credits. Approval in the web app still requires at least Team Member. The agent guide lists 50 Copilot Credits per processed receipt and requires environment billing setup; this is not a currency price. The availability table includes Danish and specified English variants. Where Azure OpenAI is unavailable in the environment geography, administrators must allow cross-geography processing. Check this separately from country availability. Only one agent can be configured per company, an expense user cannot be enabled across multiple agents, and complex interim or conditional approval arrangements are not yet supported.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[Expense Management Overview in Business Central - Business Central | Microsoft Learn](#)

[Expense Agent overview for Business Central - Business Central | Microsoft Learn](#)

[Responsible AI FAQ for Expense Agent \(preview\) - Business Central | Microsoft Learn](#)

[Copilot and agents country/region availability and supported languages - Business Central | Microsoft Learn](#)

Open in Excel is familiar; the usage signal is new

Monitoring Open in Excel usage is generally available in BC29. The export and editing workflows below are existing capabilities, not new October actions.

Start by asking what the person needs the workbook for. Open in Excel exports the page view, respecting its filters and the displayed rows and columns. It works on Windows and macOS. Changes can be saved in the workbook but are not published back to Business Central. Edit in Excel is different: it is available on most, not all, lists, uses the Excel add-in, can publish changed records back, and offers Refresh to retrieve current data. It respects most page filters, so the two actions are not interchangeable. The add-in works in Excel for the web and Windows desktop Excel, but not in the macOS desktop app. With OneDrive for system features configured, the workbook opens in browser Excel for the web; otherwise it downloads. A repeated export is a useful reason to ask about the task, not evidence by itself that Excel is the wrong tool or that someone is unproductive.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[What's New or Changed in Business Central 2026 release wave 2 - Update 29.0 - Business Central | Microsoft Learn](#)

[Viewing and editing in Excel from Business Central - Business Central | Microsoft Learn](#)

Optional technical notes: What the Excel event does and does not show

RT0056 applies from 2026 release wave 2 and is documented for successful Open in Excel actions.

The event is emitted when a user successfully opens a page in Excel. Do not extend that trigger to denied or failed exports, Edit in Excel, or report exports. Its context includes timestamp, message, page identity, company, environment name/type, client, component and extension metadata. The documented KQL example queries traces and filters customDimensions.eventId for RT0056. The user_Id value is a user telemetry ID that can identify the triggering user via the User Card; this event is not anonymous. Business Central initially assigns a GUID when the user is created, and an administrator can change or clear Telemetry ID, so do not assume a permanent identifier. The published event schema does not list exported cell values, row count, filter expression, recipient, or subsequent spreadsheet edits or distribution. That is a boundary of this event specification, not a universal privacy or compliance guarantee. Use controlled access and interpret the signal with the person's actual task in mind, rather than treating event counts as a productivity score.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[Turn sending telemetry to application insights on or off - Business Central | Microsoft Learn](#)

[Analyze Open in Excel telemetry - Business Central | Microsoft Learn](#)

Optional technical notes: Collection, access and setup

Check the existing telemetry configuration before creating resources or changing a production environment.

Environment telemetry requires an Azure subscription and an Application Insights resource. Microsoft recommends a Connection String; for BC online, configure each environment through the administration center or its API. The documented setup automatically restarts the environment at the end, so plan it outside working hours. Application Insights charges depend on data ingestion and retention; no zero-cost assumption or currency estimate follows from this feature. Sampling, daily ingestion limits, collection scope and retention can affect the observed data. Check them before treating counts as a complete audit or missing events as proof that no export occurred. Opening or editing data in Excel requires at least one of D365 Excel Export Action or system permission 6110 Allow Action Export To Excel. That is separate from access to Azure telemetry: observing an action does not grant or revoke export permission. Optional free/open-source telemetry Power BI apps require Power BI Pro licences to install; they are not required for the documented KQL route. The event guide does not specify a separate BC licence add-on or country restriction, but that absence is not a universal licensing guarantee.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[Export your Business Central data to Excel - Business Central | Microsoft Learn](#)

[Turn sending telemetry to application insights on or off - Business Central | Microsoft Learn](#)

[Telemetry FAQ \(Frequently Asked Questions\) - Business Central | Microsoft Learn](#)

[Monitoring and Analyzing Telemetry - Business Central | Microsoft Learn](#)

Plan for Fabric mirroring, do not assume access

Private preview as checked on 18 October 2026. Public preview is expected, not dated or confirmed open.

Start by identifying the analytical question, the companies and the tables needed. The FAQ requires BC 2026 release wave 2, but the exact minimum update is unconfirmed; 29.0 is only expected. Fabric capacity is required, currently an F SKU, commonly F2 or higher, or existing P capacity. Business Central adds no mirroring charge, but Fabric capacity charges remain. Treat capacity, ownership of business measures and downstream access as planning decisions, not as things solved merely by copying data.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[FAQ About Mirroring Business Central Data to Microsoft Fabric - Business Central | Microsoft Learn](#)

Optional technical notes: Table scope and replication limits

The current private-preview FAQ leaves schema-change behaviour undocumented.

Create an open mirrored database in Fabric, configure each BC environment, then select companies and tables. Standard and extension AL tables stored in SQL are supported. Every field in a selected table is mirrored: table selection is not field-level minimisation. Internal replication, not BC APIs, carries changes and deletions. Incremental changes typically arrive within minutes; initial history takes longer. This is not an instantaneous service guarantee. The private-preview limit is 1,000 selected tables per tenant and may change. Before implementation, verify current access, schema-change behaviour and downstream data permissions instead of assuming the preview answers those questions.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[FAQ About Mirroring Business Central Data to Microsoft Fabric - Business Central | Microsoft Learn](#)

Copy the contacts you actually need

The updated workflow applies from BC28 and has an April 2026 release record. It is not an October launch.

Each user starts the process for their own Microsoft 365 contacts. Select the scope with Choose contacts in the wizard; filtering the underlying Contacts list does not set that scope. Only Person contacts with an email address are copied. Existing Outlook contacts with the same email address are neither duplicated nor overwritten, so changing other fields in BC does not refresh that Outlook contact. A changed BC email can create a new Outlook contact. Switch BC company and run again for another company. Background synchronization jobs are no longer supported from BC28.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[Stay in flow of work with updated Outlook integration | Microsoft Learn](#)

[Save business contacts to Microsoft Outlook](#)

Optional technical notes: Contact privacy and the Outlook transition

Check the contact workflow separately from the Outlook add-in.

The contact workflow uses Microsoft Graph and requires Exchange Online, a work account licensed for BC and Microsoft 365, and access to BC contacts. Exchange Server is unsupported. Default copying changes only Outlook. Microsoft does not recommend the optional two-way mode: it can copy private Outlook contacts into BC where colleagues may see them. The Outlook add-in manifest targets one BC environment; another environment requires installation from that environment. The BC release notice says pre-28 add-in/contact features may cease functioning from 1 October, not that every installation has failed. Exchange Online EWS disablement is phased and tenant-dependent from October 2026, with final shutdown starting on 1 April 2027; this does not retire Exchange Server EWS or prove a particular tenant outage.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[Get the Business Central Add-in for Outlook - Business Central | Microsoft Learn](#)

[Stay in flow of work with updated Outlook integration | Microsoft Learn](#)

[Exchange Online EWS, Your Time is Almost Up](#)

[Save business contacts to Microsoft Outlook](#)

Preview the attachment before downloading

Direct image preview is generally available in BC29, October 2026.

Image preview is the BC29 addition; PDF preview already existed. Open a supported attachment inside the BC previewer and download a copy only when needed. Other file types download normally. JPG and PNG are supported, as are animated GIF and AVIF; TIFF preview is specific to Safari. Developer footnote: a custom extension must adopt File.ViewFromStream online or File.View on-premises to use the image viewer. Upgrading BC does not rewrite every extension.

Source status checked 18 October 2026. Availability and prerequisites are stated above.

[What's New or Changed in Business Central 2026 release wave 2 - Update 29.0 - Business Central | Microsoft Learn](#)

[Feature details in update 29.0 public preview for 2026 release wave 2 - Business Central | Microsoft Learn](#)

[Add attachments, links, and notes on records - Business Central | Microsoft Learn](#)