

When the next step matters

An expense report is not the same as an agent

Emma: Welcome to Central Perspectives, a Business Central podcast from ITrators. I'm Emma, here with Alex. We're AI hosts, and our scripts and voices are AI-generated. Today, we're looking for changes that make the working day easier: expense reports that don't necessarily need an agent, and what a regular Excel export might tell us about the task behind it. There are some smaller discoveries worth knowing, too. Now, let's get started.

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Emma: The useful surprise in Microsoft's expense management is that you can leave the receipt-reading agent out. Manual expense reports are an option too. This is still a production-ready preview, under preview terms, not general availability. Now imagine I've just returned from a work trip. I paid for the train myself, but the hotel went on the company card. Alex, what does that manual report give me that a folder of receipts doesn't?

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Alex: A way to distinguish what the trip cost from what the company owes you. You enter the train and hotel directly as report lines, with the amounts, categories and explanations. Without the agent, nobody is extracting those details from the receipts for you. But the information now has a structure for someone else to work with. If both costs meet company policy, the train can be money you're owed; the hotel on the company card isn't. Which part is more irritating in your example: entering the amounts, or having to explain them again afterwards?

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Emma: In this example, explaining it again. Two amounts are manageable. What would bother me is getting a question about the hotel a week later, when I've forgotten what I already sent. And the person checking it shouldn't have to reconstruct the trip from three emails either. I'd rather spend a little time making the report clear once, while I can still remember it.

Alex: Then I'd try the manual report first. Faster receipt capture isn't the main thing you're asking for. Take that hotel bill: if it includes the room and a meal, itemization lets you separate them rather than leave one unexplained total. You can record participants where that matters, too. And whoever checks it needs to see that the company card paid, so an eligible hotel stay doesn't become a second payment to you. I'd give a colleague that sample report without the three emails and ask what they still need to know. That would tell us whether the extra detail is actually helping.

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Emma: Let's put a personal minibar purchase on that hotel bill, something the company's policy doesn't cover. The same card paid for all of it. When the documentation says refundable and reimbursable, which distinction is it asking the reviewer to make? Those words sound much closer together than our room and minibar ought to be.

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Alex: Here, refundable means the cost meets company policy and is eligible for processing. Reimbursable means the employee paid personally and is owed the money. So the room can be refundable, but it isn't reimbursable to you: the company already paid. The minibar purchase fails the policy test. Putting it on the same receipt, or paying with the same card, doesn't make it eligible.

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Emma: And yet the report can still be submitted. The guide says rule violations are shown to the approver, but don't themselves block submission. So if our minibar has been flagged, someone still has to act on it. What happens if the approver sends that report back?

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Alex: The employee can reopen the rejected report, correct it, release it and submit it again. If the minibar has been claimed as eligible, that is what needs correcting, not merely giving it a tidier description. Release then locks the report for editing. It doesn't mean the correction has been approved, and it certainly doesn't mean anyone has been paid. The approver still has that revised report to consider.

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Emma: We chose to have an approver in our example. Without Expense Agent, that approval workflow is optional; it isn't automatically part of every manual report. Now suppose the company does want help reading a larger pile of receipts. Does switching on the agent leave that approval choice as it was?

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Alex: No. With the agent, approval goes through its built-in process in the web app. That's part of the choice, alongside the help reading receipts. I can see the appeal with a larger pile, but I'd check that the people responsible can make the decisions they need in that process. Does our company have a straightforward manager approval, or are there claims that need another decision along the way?

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Emma: Let's say ordinary travel goes to the employee's manager, but a cost charged to a project also needs the project owner's approval. The manager knows why the employee travelled; the project owner knows whether that project should pay. I wouldn't want the employee carrying messages between them just because the receipt was easier to submit. That second decision matters in our example.

Alex: That changes the fit. Microsoft says the agent doesn't yet support complex interim or conditional approvals. I wouldn't recommend it on the assumption that your project-owner step will fit, and sending the employee off to collect approval by email wouldn't meet your requirement. I'd take one ordinary travel report and one project-related report into an assessment of the manual workflow instead. Can each reach the people who must decide, without the employee coordinating it? The manual route has approval workflows, but we still need to establish whether it supports those two paths.

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

Emma: For a company whose approvals do fit, there's a useful opening for employees who don't otherwise work in Business Central. Sending receipts through the agent's web app or by email doesn't require a Business Central licence. That could keep a small task small. But the manager might open that same web app to approve the report. Does the submission exemption cover the manager too?

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Alex: No, the manager needs at least Team Member to approve, even in that same web app. The exemption is for submitting receipts, not every activity in the app. Entering or approving expenses inside Business Central also needs at least Team Member; posting and processing payments need Essentials or Premium. So the light-touch option you spotted is real for the person just sending receipts. That submission still consumes Copilot credits, though.

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Emma: Then what would you count before switching it on: employees, reports, or individual receipts? I'd want a useful estimate before that first busy month, not a surprise afterwards.

Alex: Processed receipts. The current guide says fifty Copilot credits per receipt. If we expect two hundred in that busy month, we'd budget for ten thousand credits of receipt processing. Then the billing owner needs to turn that into a currency amount using the company's actual agreement, with the required licences accounted for separately. Billing also has to be configured for the agent's environment. I'd use an ordinary month and a busy month for that estimate, so we can see the range rather than disguise the peak in an annual average.

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Emma: And where does the agent's work stop? Once those receipts have been captured and the report approved, are posting and paying the employee included, or still separate jobs?

Alex: Still separate. The agent neither posts the expenses nor reimburses the employee. Those steps remain manual work in Business Central, so someone in finance still needs to take the approved report through to accounting and payment.

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Emma: There's a very concrete decision for finance in the guide: suggestions for VAT reclaim, if that feature is enabled. Does the manager's approval settle those, or does an accountant need to decide before posting?

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Alex: An accountant still has to approve or reject each VAT reclaim suggestion before posting, and remains responsible for that decision. The manager may have confirmed that the trip was legitimate. That doesn't establish whether the suggested VAT treatment is right.

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Emma: I'd want that accountant involved in a pilot, then, to see whether the suggestions actually help. And Danish is on the agent's supported-language list, which is encouraging for trying it with familiar receipts. Does that language support tell us where the receipt data will be processed?

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Alex: No, that's a separate question. If Azure OpenAI isn't available in the environment's geography, an administrator must allow processing across geographies. I'd have that location and configuration checked before using real receipts. Once that's settled, your accountant can help answer the interesting part of the pilot: does the captured information make review easier, or does correcting it take away the saving? Danish support gives us a reason to try, not the result of that test.

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What does an Excel export tell you?

Emma: Now, a familiar button with something new behind it. Open in Excel has been around for years. In Business Central 29, usage telemetry for that action is generally available. Imagine a colleague exports an order list every Friday to prepare for a weekly meeting. The workbook may be doing exactly what they need. Alex, what can the system owner learn from that repeated export?

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Alex: They can see a recorded event when someone successfully opens a page in Excel, with context including the page, company, environment and time. That could point them to your Friday order list. It doesn't follow the colleague into the workbook and watch the work there; subsequent editing isn't part of this documented event. So we have a place to begin, rather than a reason to replace anything. What does the colleague actually do with those orders for the meeting?

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Emma: Let's say they pick out the orders that need a decision, then add a comment and a meeting priority beside each one. "Check the delivery date" is a note for the discussion, not a request to change the order yet. I'd want that distinction kept. The team needs somewhere to think before every tentative idea becomes a business record.

Alex: Then I'd keep the workbook as a perfectly reasonable option. Open in Excel takes the rows and columns shown on the page, respecting its filters. The colleague can add those priorities and comments to the resulting copy without publishing the changes back to Business Central. Even trying a different delivery date in that workbook doesn't change the order. Your "check the delivery date" stays a working note until someone takes the agreed action in the business system.

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Emma: That last step is easy to lose after the meeting. Suppose everyone agrees a new date and the colleague saves the workbook, thinking the order is now updated. Edit in Excel really can send changes back. What makes that a different route rather than just another name for saving this copy?

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Alex: Edit in Excel uses the Excel add-in, with a Publish action to send changed records back to Business Central. Saving a workbook is not that action. There's also Refresh to retrieve current Business Central data. It's an existing option on most lists, not every list, and we'd need to check that the intended field can be edited there and the colleague has the necessary permissions. So for the agreed date, I'd make the handover explicit: who is updating the actual record, through which supported route?

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Emma: I'd leave that with the person responsible for the order, working in Business Central. The meeting workbook can stay a place for discussion rather than quietly becoming another editing system. But to have this conversation with our Friday colleague, the system owner has to find them. Does the telemetry identify who exported, or only give an anonymous count?

Alex: It can identify the person. The event contains a user telemetry ID, and Microsoft says you can link it to the user through the User Card. So this isn't anonymous. I'd limit who can inspect that information and use it to find the colleague who can explain the task. That's useful access; turning it into a ranking of who exports most would answer a rather different question.

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Emma: And I'm not sure what the winner of that ranking would have won. One person might export five orders for a useful discussion; another might export the whole list, notice the wrong filter and try again. Does the event show the row count or the filter, so we can tell those situations apart?

Alex: Not in the published event schema. It doesn't list row counts, filter expressions or exported cell values. Two successful exports could be two useful tasks or your colleague correcting that selection; the count won't distinguish them. In your example, I'd ask to see how they choose the orders before exporting. That could reveal a selection problem we can help with, rather than a problem with using Excel.

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Emma: What about the opposite? Our colleague says they used Excel on Friday, but there's no event. Before anyone disputes their memory, could they simply have used a different route into Excel?

Alex: Yes. This event is specifically for successful Open in Excel actions. It doesn't cover Edit in Excel or exporting a report to Excel, and it isn't a record of failed or denied attempts. So the colleague could be entirely right. A missing event here doesn't tell us they didn't use Excel.

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Emma: Let's have the colleague show us: it really is Open in Excel, and the workbook opens successfully. If we still can't find the event, where would you look next? I'd rather find out whether we're collecting the right information before declaring the new feature broken.

Alex: That demonstration gives us a time and a specific environment to look for. I'd check it's on version twenty-nine or later, then ask whether that environment sends telemetry to Application Insights, the Azure service where these signals can be collected and queried. We might simply be looking in the wrong collection or time window. Then there are collection limits: sampling can keep only a selection of events, a daily ingestion cap can limit what arrives, and retention determines how long it stays. Those are possibilities to check with the collection owner, not a diagnosis from an empty result.

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Emma: Suppose nothing is being collected yet. Is enabling it something the administrator can do there and then, or does it need a planned moment? I'd hate to interrupt everyone's Friday work just to understand one person's Friday export.

Alex: I'd plan it outside working hours. Microsoft's online setup guide warns that completing the configuration automatically restarts the environment. That's the setup step, not every time someone queries an event. You need an Azure subscription and an Application Insights resource, configured for the Business Central environment. Before creating anything, I'd still check what the administrator already has. This particular environment might not be connected yet, but that doesn't necessarily mean the company needs another Azure resource.

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Emma: Let's keep the first question small, then: understand that weekly task, not launch a reporting project. What should the company budget for to collect and examine the events? Microsoft also offers telemetry dashboards in Power BI. Do we need one just to get started?

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Alex: No dashboard required. I'd start with Microsoft's documented query in Application Insights, using an existing collection if it contains the events we need. The optional telemetry Power BI apps require Pro licences to install; running that query doesn't. The underlying Application Insights bill depends on data ingestion and retention: how much arrives and how long it's kept. We'd need the company's actual usage and pricing arrangement to estimate that. For your small question, I'd ask the collection owner to retrieve the relevant events before proposing another reporting tool.

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Emma: One distinction for that owner, then: access to these observations isn't the same as deciding who may export. Does enabling telemetry change anyone's Excel permissions?

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Alex: No. Permission to open or edit data in Excel is separate from access to inspect telemetry in Azure. Collecting the events doesn't grant or revoke the colleague's export rights. In our Friday example, I'd leave the useful workbook in place. The improvement we found was making someone responsible for putting the meeting's decision into the order, rather than assuming saving the discussion copy had done it.

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A copy for analysis, not a finished dashboard

Emma: There's another kind of copy in the news: native mirroring from Business Central into Microsoft Fabric. It's still in private preview, so not something everyone can switch on today. Suppose the company wants to compare invoiced sales with advertising costs held in another system. Alex, before we picture a finished dashboard, what would this mirror actually give the team?

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

Alex: A copy of selected Business Central tables, kept in what Fabric calls an open mirrored database. Replication brings the records across and keeps the copy updated. That gives the analysts Business Central data in the platform where they can also bring in the advertising costs. Useful groundwork, but not a finished comparison: the mirror doesn't decide what counts as sales or connect a sale to a campaign for us.

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Emma: Let's give them a weekly discussion about next week's advertising budget. They want to see what they spent alongside invoiced sales, with returns taken into account, rather than just celebrate a rush of new orders. I'd be interested in that difference: a busy week can look rather less successful once some of those purchases come back. The team needs a fair comparison, not simply two rising lines.

Alex: Then a later return needs a clear place in the comparison. Suppose a sale is invoiced this week and returned next week. The mirror brings the records across, but the team's analytical model must decide which week that return affects. For your budget meeting, would you show it in the week it was recorded, or revise the original sales week to reflect what came back?

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Emma: For that discussion, I'd look back at the original sales week. I want to know which sales held up, not make next week look poor because this week's purchases came back. But then the newest week isn't settled yet. I'd rather see it clearly marked as provisional than have a very precise-looking number hide that we're still waiting.

Alex: I'd put that exact case into the acceptance test for the analysis. Choose an invoice and a later return that we know belongs to it, then check that the original sales week changes by the agreed amount. Also check that the newest week is visibly provisional, even when all the available records have arrived. That's the behaviour we'd ask the analysts to build. It means we need the related return records as well as the invoices, not just a convenient sales total.

Emma: Can we choose just the company and tables needed for that comparison? I'd rather start with a dataset the team understands than copy the whole environment and hope the useful part becomes obvious.

Alex: Yes. You configure the connection for each Business Central environment and choose the companies and tables to mirror. That includes standard tables and extension AL tables stored in SQL, so useful business-specific data isn't automatically left out. The selection stops at the table, though: all its fields come across. We can choose which tables serve our comparison, but this isn't a picker for just the handful of columns we plan to display.

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

Emma: So our neat chart of dates and sales amounts could sit on top of a much wider copy. Leaving a field off the chart hasn't kept it out of Fabric. Who would you bring into the table-selection discussion before the analysts start using that data?

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Alex: The analyst, the person responsible for that business data, and whoever manages access in Fabric. They need to look at the full tables together, including fields that won't appear in the chart. Then distinguish who needs the finished comparison from who needs to read the underlying copy. Those don't have to be the same audience. I'd have the Fabric owner verify that arrangement there, rather than assume the Business Central permissions have settled it for us.

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

Emma: That system owner may already have an integration fetching data through Business Central's APIs. Is native mirroring another version of that pull, or does it keep the copy current by a different route?

Alex: It uses internal replication, not requests through the Business Central APIs to fetch the data. That replication carries changes across to the mirror, including deletions.

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Emma: Including deletions is worth stopping on. I wouldn't hear "we have another copy" and count it as a recovery plan, then. We're talking about a mirror for analysis, not a backup?

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Alex: Right. Deletions follow the data into the mirror, so backup and recovery need their own design. And if the team needs an unchanged record of what last month's analysis showed, it needs a deliberate way to preserve that. We shouldn't promise that historical view from mirroring alone.

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Emma: For the weekly budget meeting, I'm less interested in watching every sale appear instantly than in knowing how current the figures are. What does the documentation say about the first load of history and the updates after that? Are those different waits?

Alex: Yes. The initial history takes longer to load; after that, incremental changes typically arrive within minutes. That's a typical delay, not an instantaneous guarantee or a service-level promise. For your weekly meeting, I'd agree an acceptable cutoff for both datasets. If sales includes Friday but the advertising costs only reach Thursday, a very fresh sales copy hasn't made the comparison ready. The analysts need to check the periods they're comparing, as well as whether the Business Central records have arrived.

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Emma: That's something the team can agree now, while access is still private preview. But if the system owner is planning an upgrade, how precise can we be about the Business Central version they'll need? Is twenty-nine point zero confirmed, or only expected?

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Alex: Only expected. The FAQ updated on October twelfth requires the twenty twenty-six release wave two, but leaves the exact minimum update unconfirmed. Twenty-nine point zero is its expectation, not a confirmed requirement we can put into an upgrade plan. And having the right version wouldn't by itself grant access to the private preview.

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Emma: What about the budget once access is possible? "Built in" can sound like "already paid for." Is this covered on the Business Central side, with Fabric capacity still a separate cost?

Alex: Yes. Business Central adds no charge for the mirroring itself, but paid Fabric capacity is still required. That may be capacity the company already has, so I'd ask its owner before assuming a new purchase. Our weekly comparison now gives that conversation something concrete: a proposed dataset and an idea of how the team will use it. They can assess what capacity fits that workload when the access conditions are confirmed, rather than buy a size because it appeared in a preview example.

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Your contacts, deliberately copied

Emma: Our next feature is already available. The updated workflow for saving business contacts into Microsoft 365 dates from Business Central 28 and the April update, though the transition from older integration makes it worth understanding this October. Imagine a colleague getting ready for customer meetings. They want a few business contacts in their own Outlook address book, not the entire contact list. Alex, how do they get the people they need across?

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Alex: They start on the Contacts page and choose Synchronize with Outlook. That opens a guided process, where Choose contacts lets them narrow the selection. Before copying, they can preview the people found and exclude anyone they don't want. For those meetings, that's a useful chance to check the actual names rather than just trust the size of the list. The colleague runs this for their own Microsoft 365 contacts; it doesn't fill everyone else's address book.

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Emma: Suppose the Contacts page already shows just their customers because they've filtered it. Does the wizard inherit that selection, or do they need to choose those contacts again inside it?

Alex: They need to set the selection inside the wizard. Filtering the Contacts page itself has no effect on which contacts are copied. Use Choose contacts there, perhaps with the relevant salesperson code, then inspect the preview.

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Emma: In that preview, would they expect both the company contact and the individual person they're meeting? I'd want to know what qualifies before treating a missing name as a failed copy.

Alex: Only Person contacts with an email address qualify. Company contacts are ignored, as are contacts without an email address. If the person they're meeting is missing, check those two things on the contact record first: the type and the email address.

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Emma: Now suppose that person is already in Outlook with the same email, but Business Central has their new phone number. That's the detail I'd want before leaving for the meeting. Does running the copy update the existing Outlook contact?

Alex: No. With the same email address, the workflow treats it as the same contact and neither copies it again nor overwrites it. So that new phone number in Business Central won't refresh the existing Outlook contact through this process. The number you need for the meeting could still be the old one there.

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Emma: I can appreciate not overwriting details someone has deliberately kept in Outlook. But I'd describe the benefit differently to our colleague now: bring across the new people you need, rather than refresh your whole address book. And we'd check that changed phone number separately before the meeting. Still useful, just a more specific promise.

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Alex: And in that check, "new" needs a glance at the email address as well as the name. If someone's email changes in Business Central, the next copy can treat them as a new contact and create another Outlook entry. Our colleague might already know the person perfectly well, but now have two versions to choose between before sending the meeting details.

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Emma: Then I'd prefer to choose when that copy happens, rather than assume someone is maintaining it for me in the background. Is that how the current workflow works? And if our colleague works in two Business Central companies, does one run cover both?

Alex: You do choose when. From version twenty-eight, background synchronization jobs are no longer supported; each user runs the copy for their own account. But one run covers only the currently selected Business Central company. For the second company, switch and run it again. If your colleague wants to keep the sources separate, they can first create a folder for each company in Outlook, then select the corresponding folder in the wizard. That lets them organize those deliberate copies in a way they'll recognize later.

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Emma: There's also an option to update both Business Central and Outlook. Before our colleague chooses that, suppose the selected Outlook folder contains a few private contacts as well. Where do those go on the return journey, and who could see them?

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Alex: Contacts from that selected Outlook folder can be copied back into Business Central, where colleagues may be able to see them. That includes private contacts in the folder. Microsoft explicitly doesn't recommend this two-way option. For our colleague preparing for meetings, I'd keep the default direction: update Outlook only, leaving the Business Central contact list unchanged. We wanted business contacts in their address book; we haven't identified a need to send their other contacts into the company.

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Emma: That fits the job. Before our colleague tries it, though, "I use Outlook" isn't much of a description of the setup. What should they ask the administrator to check about their work account and where the mailbox is hosted?

Alex: Check that the work account has licences for Business Central and Microsoft 365, and access to the contacts in Business Central. Then check the mailbox: this workflow uses Microsoft Graph and requires Exchange Online. Exchange Server isn't supported, even if the person reads their mail in Outlook. Business Central itself can be on-premises with Exchange Online, though. So it's the mailbox platform we need to establish, not just the name of the app on the screen.

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Emma: That helps explain why an April update matters now. Microsoft's notice names October first for older Outlook and contact features, from before version twenty-eight. Should listeners read that as every older installation having stopped on that date, or is the warning more qualified?

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Alex: It's qualified: those older features may cease functioning. That isn't evidence that every installation stopped on October first. Separately, Exchange Online is phasing out Exchange Web Services, with tenant-dependent disablement starting in October twenty twenty-six and full shutdown in twenty twenty-seven. That notice doesn't retire Exchange Web Services in Exchange Server. The administrator needs to establish the actual Business Central version, mailbox platform and feature in use. Contact copying and the Outlook add-in are distinct things to inspect; a headline about one shouldn't become a diagnosis of the other.

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

Emma: For example, suppose the Outlook add-in opens a test Business Central environment when the colleague expects production. I wouldn't put that in the same bucket as a missing contact. What determines which environment the add-in opens?

Alex: Its installation configuration, called the manifest, points to one Business Central environment. To use another environment, the add-in needs to be installed from that intended environment; administrators can also deploy it centrally. So in your example, I'd inspect which environment the installed add-in targets. That gives the administrator something specific to verify before changing anything. Copying the contacts again wouldn't change that target.

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

Look at the attachment, stay in the task

Emma: Here's a smaller improvement I'm pleased to see: image preview directly in the Business Central web client is generally available in version twenty-nine. Think of someone checking an attached product photo to see whether it shows the right item. The job is to look at the picture, not acquire another file for the downloads folder.

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Alex: For a supported photo, such as a JPG or PNG, opening the attachment brings up the previewer inside Business Central. You can look, close it and carry on with the record you were checking, without first downloading the picture. If you know the existing PDF preview, it's a familiar idea. PDF preview isn't the new part here; extending that convenient look-and-return flow to images is.

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

Emma: Sometimes looking is only the first step, though. Suppose the employee also needs the picture for a separate document. Can they still download it from the viewer? And what happens to an attachment the viewer doesn't support?

Alex: Yes, download is still available from the previewer. The employee can check that it's the right picture first, then download it for that document. Unsupported file types download in the usual way. So preview removes the compulsory detour for a quick look without taking away the file when the next task actually needs it.

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Emma: What if the company's own extension has an Open picture button that still downloads after the upgrade? Should the new viewer appear there automatically, or does that button need a developer's attention?

Alex: A developer needs to check how that button opens the file. Extensions have to adopt the viewer methods; upgrading Business Central doesn't rewrite the custom action. The method differs between online and on-premises, and we'll keep the exact names in the technical notes. So I'd give the developer that button and a supported sample image to investigate. Its continued download isn't, by itself, evidence that the Business Central upgrade failed.

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

Emma: I like ending with someone simply getting a look at the picture and carrying on. We kept asking today whether the improvement actually reaches the person doing the task. Sometimes our answer was to keep the useful meeting spreadsheet, not replace it. That feels like worthwhile progress to me. What stays with you, Alex?

Alex: Your point about not reconstructing a trip from emails. That made a clearer expense report the first thing to test, rather than assuming receipt capture was the problem. It changed what we would ask a pilot to prove.

Emma: We'll leave it there. The primary sources, release details and technical notes are in the episode notes. Thanks for listening to Central Perspectives from ITrators. Until next time.