

Help that fits the work

Copilot on the current record

The new in-product pane can help a person understand the record already in front of them. Its useful boundary is explanation, not permission to act.

From version 29, Microsoft Copilot replaces the previous Chat with Copilot experience; after the upgrade, users cannot switch back. Microsoft calls the replacement a production-ready preview. It can use the current page or record as context, retrieve information and explain it, but it cannot create, change or delete Business Central records. Agents built with the Business Central agent framework cannot currently be invoked from this pane; that is not a statement about every kind of Microsoft Copilot agent.

A possible first use is to ask for an explanation of an open order and then inspect the cited records. That is an illustrative approach, not a tested result or a guarantee of correct analysis. Aggregation and complex analysis have limitations, so an important conclusion still needs checking against the underlying records.

Business Central 29: production-ready preview, subject to supplemental preview terms. Documentation checked 18 October 2026; tenant access and behavior were not tested.

[Microsoft Copilot in Business Central FAQ - Business Central | Microsoft Learn](#)

Bank reconciliation: proposals before acceptance

The interesting case is the transaction left over after ordinary matching, not replacing the entire reconciliation process with AI.

Ordinary automatch runs first. Copilot then looks for additional matches using dates, amounts and descriptions. A supported case is one combined bank payment corresponding to several separately recorded payments. The generated AI matches are initially unsaved: the user can inspect them, remove individual proposals, discard everything or keep the chosen matches.

Keep two consequences separate. In the matching flow, automatic posting of the reconciliation requires the optional Post if fully applied setting, every line matched and the user choosing Keep it. In the separate Post difference to G/L account flow on an existing reconciliation, accepting the proposals posts new payments through the selected general-journal template and batch. A matching suggestion and a proposed new posting are not the same decision.

This is established functionality, not an October 2026 launch. The historical release table records general availability on 1 October 2024, while preview wording remains in the old plan and current operational page title. That labeling conflict is retained rather than simplified into a universal status claim.

Historical Business Central online release: GA milestone 1 October 2024, with retained preview labels. Current operation and language documentation checked 18 October 2026; activation was not tested.

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[Complete bank account reconciliation faster with Copilot | Microsoft Learn](#)

Posting windows: rolling convenience or fixed limits

Date formulas can remove recurring changes to posting-period settings, but the date they follow matters to the control the business intends.

The current operational guidance evaluates posting formulas against Work Date whenever a posting date is validated. Users can change Work Date in My Settings, which can move the calculated window. A rolling window therefore does not provide the same fixed boundary as an administrator-set date. Fixed dates remain the documented choice when users must not be able to shift the boundary; a fixed boundary and a formula can also be combined.

For example, Microsoft documents -CM and CM for the current month: with Work Date set to 17 March 2026, the permitted range is 1-31 March. This is a documentation example, not a tenant test.

The archived release description says the calculation is based on today, whereas the current operational page explicitly says Work Date. These notes use the operational guidance for behavior and preserve the discrepancy. A useful proposed check is to compare the same posting date under two Work Dates in a test environment before choosing a control design.

Business Central 28 / 2026 release wave 1: historical GA date 1 April 2026. Operational guidance checked 18 October 2026; Work Date behavior was not executed in a tenant.

[Specify posting periods - Business Central | Microsoft Learn](#)

[Use date formulas to control allowed posting periods | Microsoft Learn](#)

Subcontracting instructions that reach purchasing

For a manufacturing business, the handoff is about the instructions for a specific operation, not simply putting a file somewhere accessible.

With the Microsoft Subcontracting extension and the required manufacturing setup, reusable comments can be copied from a subcontracting standard task to a routing operation and edited there. Calculating or refreshing the production order transfers the operation comments to production routing. The documented flow calls for reviewing those comments before creating the purchase order. Both direct and worksheet creation carry them into ordered, zero-quantity text lines linked to the relevant purchase line. This is a copying workflow, not evidence of a live link that updates every later document automatically.

Attachments have a separate condition: the routing attachment needs both Document Flow Production and Document Flow Purchase enabled. The supported path goes through the production-order line to the purchase line. A file added manually to the production-order line does not follow that path to purchasing. Presence on the purchase line does not, by itself, establish that the supplier received the file. A proposed acceptance check should therefore follow the actual intended instruction and drawing through the business's outgoing document process.

Business Central 29 / 2026 release wave 2 lists instruction transfer as generally available. Microsoft Subcontracting extension and appropriate setup required. Documentation checked 18 October 2026; no end-to-end test was performed.

[Set up subcontracting - Business Central | Microsoft Learn](#)

[Order subcontracting - Business Central | Microsoft Learn](#)

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

Recent lookup values: a small shortcut

When the next entry needs a record just used, a personalized recent list may be more direct than starting another search.

Some lookup fields offer Recent and Search modes. This is not a promise that every lookup supports recent values. Typing while Recent is displayed switches back to search results. Switching to Recent again can leave the typed text in the field, but that text does not filter the recent list. Column sorting is also unavailable in that view.

A simple proposed check is to try a frequently used supported field, type part of a record name, then switch back to Recent and notice which list is being shown. The benefit is a potentially shorter route to a familiar record, not a measured time-saving claim.

Business Central 29 / 2026 release wave 2 lists recently used lookup values as generally available. Documentation checked 18 October 2026; supported fields were not tested in a tenant.

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Optional technical notes: Copilot access boundaries

For the system owner evaluating access, language and what the pane can actually retrieve.

Keep three questions separate: whether organizational policy and the active Business Central Chat capability permit access; which Business Central records the user already has permission to read; and whether a Microsoft Copilot licence is assigned for Microsoft 365 work information through Work IQ. That licence does not extend Business Central record permissions. Browser or account restrictions can also prevent opening the pane.

The pane has its own supported-language list and falls back to English when it cannot display the Business Central language. Do not infer its language coverage from the separate bank-assist row. If the conversation is continued outside Business Central, previously retrieved context can remain, but further Business Central data cannot be retrieved there.

Suggested validation, not a performed test: choose a permitted record and an important question; check the response's cited records, the expected access boundary and the intended display language. Do not use a successful opening as proof of correct analysis.

BC29 production-ready preview. Licensing, policy, permissions and supported language remain separate conditions; no organization-specific access was verified.

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

Optional technical notes: bank-assist setup and limits

For the owner of reconciliation settings, difference postings and test data.

An administrator must activate the bank reconciliation capability. Current availability documentation lists Danish and English for bank assist; localization and data/AI geography still affect availability. The historical release scope is Business Central online.

In the difference-posting flow, the proposed G/L account can be corrected and a text-to-account mapping can be saved for a recurring description. That account-editing behavior belongs to this flow, not the matching flow. Review the journal template and batch as part of the proposed posting.

For 2025 release wave 2 and later, the documented capacity is approximately 3,000 open bank ledger entries whose posting dates fall from the statement's minimum transaction date minus one day through its maximum transaction date. Description length affects capacity; earlier versions have a lower limit. This is not a guarantee for exactly 3,000 statement lines.

Suggested test cases, not observed results: a known combined payment, a plausible wrong match, an unmatched difference and the optional fully-applied posting setting. Inspect the consequence of accepting each kind of proposal separately.

Current documentation checked 18 October 2026. Historical GA and retained preview labels remain qualified as in the main note; no accuracy, fraud-detection or autonomous-approval claim is made.

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

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Optional technical notes: posting-rule interactions

For the person configuring company, user and journal-template posting periods.

The formula fields are documented in General Ledger Setup, User Setup and General Journal Templates. User-specific posting periods can override the company periods. The guidance then describes the applicable journal-template checks; it should not be paraphrased as a universal "the narrowest date range always wins" rule.

For each boundary, a fixed date and a date formula are alternatives: entering one clears the other. The From and To boundaries can use different approaches. A suggested configuration test should cover the effective user exception, any relevant journal-template restriction and the chosen Work Date. Keep the resulting allowed range distinct from whether that is the control the business intended.

The proposed test is not evidence of tested setup, and these notes intentionally avoid an unverified click-by-click claim about the location of the journal-template toggle.

BC28 / 2026 release wave 1; GA record dated 1 April 2026. Current operational Work Date guidance takes precedence in this explanation over the archived “today” wording, with the conflict disclosed.

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[Use date formulas to control allowed posting periods | Microsoft Learn](#)

Optional technical notes: subcontracting paths

For the manufacturing owner checking setup completeness and purchase-order creation.

The assisted setup saves defaults and provides links to configuration pages; it does not verify that every routing, bill of materials, price, location and vendor is ready. The supported workflow needs manufacturing routing context and vendor-linked work centers with subcontracting locations. Subcontracted routing operations use Work Center, not Machine Center.

Direct creation from a released production order can select several routing operations, but each selected line creates its own purchase order, even when the subcontractor is the same. The worksheet supports review and batch creation; operations sent to the same vendor location can result in one purchase order. Repeated direct creation does not duplicate existing comment lines.

Suggested check, not an executed procedure: follow one operation-specific comment and one routing-origin attachment through the intended creation path, with both required attachment-flow flags enabled. Compare direct creation with the worksheet only if consolidation matters. Production-line attachment settings are read-only; manually adding a file there is not an equivalent supported shortcut. The subcontracting worksheet also requires production orders to have Released status.

BC29 instruction-transfer improvement; Microsoft Subcontracting extension and setup required. Current source evidence does not establish supplier receipt or a live synchronization guarantee.

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Optional technical notes: identify the lookup mode

A small diagnostic distinction for supporting users during repeated entry.

Recent and Search are different views, not two sorts of the same filtered result. Retained field text does not filter Recent, and Recent has no column sorting. A proposed support check is simply to establish the active mode and whether that particular field supports recent values before treating an unexpected list as a search failure. This check has not been performed in a tenant.

BC29 generally available inventory item; scope remains some supported lookup fields, not all fields.

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