

Help that fits the work

Copilot on the current record

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 at help with the work in front of you: understanding an order, dealing with the bank transactions that still don't match, and making everyday choices a little easier. Where does that help leave you with less work, and where do you still need to decide? We'll explore new changes alongside an established capability worth knowing. Now, let's get started.

Emma: Business Central 29 brings a changed Copilot pane, currently a production-ready preview. Let's put someone on an order page they need to understand before answering a customer. I'd rather they could start with what's already on screen than describe the whole order again. Alex, can the pane work from that open order?

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Alex: Yes. The current page or record can give Copilot context, so the employee can start by asking for an explanation of the order they already have open. That is a useful reduction in the work of asking: less describing where you are, more attention to what you need to understand. The boundary is that this is reading and explaining, not changing the order. It cannot create, edit or delete those records. An explanation can help prepare the customer's answer; it has not carried out the next step for you.

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Emma: I don't need it to change the order for that to be useful. Sometimes understanding it is the job. But our employee now has a neatly written explanation and a customer waiting for an answer. What should they check before that explanation becomes the customer's reply? A confident sentence can travel quite quickly.

Alex: I'd slow down the sentence that matters to the customer, not make the employee audit every word. Suppose the explanation says the order is complete. Before passing that on, check whether the underlying records actually support that conclusion. Copilot can provide links to records it used; open those and inspect the evidence, rather than treating the link itself as a seal of approval. If the answer doesn't provide enough support, go to the authoritative record directly. The wording can be helpful while the conclusion is still wrong.

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Emma: With one order, I can open the evidence you're pointing to. I'd be tempted to go further: which customers account for most of our outstanding orders? That could be useful for planning the day. Is this pane a sensible place to ask that broader question?

Alex: It's reasonable to ask, but I wouldn't treat the ranking as established just because the pane answers. Adding up records and doing more complex analysis are documented limitations. For your day plan, though, do you need a reliable total for each customer, or help understanding a few orders you already need to follow up? Those are different jobs.

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Emma: The second one. Our employee already has three customers waiting for answers; they don't need a ranking to know who to call. I've made their task bigger than it was. I'd start with those orders and the details they don't understand. Getting to a useful question for a colleague would already be progress.

Alex: Then I'd try one of those orders with a colleague who already understands it. Ask Copilot about the part that is unclear, then compare its explanation with what the colleague can establish from the record. Does it help the employee identify the missing detail and ask a sharper question? That would count as useful help even if the colleague still has to resolve it. I wouldn't make "no need to ask anyone" the test of success.

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Emma: That familiar order gives the team something concrete to try. There's a changeover detail worth knowing, too: version 28 keeps the previous chat until the upgrade to 29. After that, you can't switch back to it. For people who already use that chat, what would you put alongside the order check so they're ready for the change?

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Alex: I'd bring a few questions people actually use the old chat for, and try them with those employees' normal permissions. An administrator's successful demonstration doesn't tell you whether the employee can use it. The organization must allow access, the Chat capability must be active, and the user needs permission. If the pane won't open, sort out access before judging its answers. Once it does, the question is whether it helps with that familiar task, not whether it looks or responds exactly like the previous chat.

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Emma: Those normal permissions matter when someone asks for a Copilot licence, too. If the company assigns one to our employee, does that change which Business Central records they can see, or does the licence unlock something different?

Alex: It unlocks different capabilities, not extra Business Central records. Access to Microsoft 365 work information, such as emails and meetings, through Work IQ requires an assigned Microsoft Copilot licence. But if our employee cannot access a particular Business Central record, assigning that licence does not remove the restriction. Those record permissions still apply. So a missing piece of Microsoft 365 context and a restricted order are two different things to investigate.

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Emma: Let's follow the employee back to that customer reply. If they continue the same conversation outside Business Central, can they ask for an updated position on the order there? Or is the conversation carrying what it already knows, rather than looking again?

Alex: It carries what it has already retrieved. Outside Business Central, that conversation can still use its existing Business Central context, but it cannot fetch further Business Central data there. So another answer in the same conversation is not evidence that it has checked the order again. For a fresh position, go back into Business Central.

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Emma: A colleague could have changed the order while our employee was writing. I'd keep the explanation as a starting point, but check the order again before sending the answer. The conversation may feel continuous; the evidence isn't necessarily current.

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Alex: That keeps the explanation useful without asking it to be the whole workflow. There's another boundary if the employee wants to hand work to an agent: this pane cannot currently invoke Microsoft or third-party agents built with the Business Central agent framework. That is a specific limitation of this route, not a statement that every agent or every Copilot feature is unavailable. Help inside a particular task is a separate thing to look at.

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Reviewing bank reconciliation proposals

Emma: Bank reconciliation is a good place to look at that task-specific help. Copilot assistance here is an established capability, not an October 2026 launch. Imagine the usual automatic matching has cleared most of the statement. One payment remains: the bank shows a combined amount, while the business recorded the payments separately. I'd like help untangling that remainder, not starting the whole reconciliation again. How does Copilot approach it?

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Alex: That leftover is exactly the sort of case it can help with. The ordinary automatic matching runs first; Copilot then looks for additional matches among what remains, using dates, amounts and descriptions. For your combined payment, it can propose linking the one bank statement line to several bank ledger entries. So the useful step is finding a possible group of entries, rather than making someone hunt for each one separately. It is still a proposed match, not a conclusion the employee has already accepted.

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Emma: Finding the group could save a lot of searching. But imagine two different combinations happen to add up to that same bank amount. The total fits; the payments might not. Can the employee inspect the entries in the proposal and remove a doubtful match without throwing away the useful ones?

Alex: Yes. The results show the proposed matches for inspection, and none of Copilot's proposals has been saved at that point. In your two-combination case, I'd compare the dates and descriptions with the payment information, not stop at the matching total. If the evidence still doesn't distinguish them, leave that match unresolved. You can remove the doubtful proposed match with Delete Line and retain the other useful proposals. Discarding everything is available too, but one uncertain match doesn't require it.

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Emma: I'd keep the groups I could verify and leave that ambiguous one for later. A tidy screen isn't worth choosing the wrong payments. But when the employee chooses Keep it, are they just saving those matches, or could that also post the reconciliation?

Alex: It can do both, depending on a separate option called Post if fully applied. If that is enabled, every line must be matched, one hundred percent, and the employee must select Keep it for the reconciliation to post automatically. In your case, leaving that ambiguous line unmatched means the all-lines condition is not met. Keeping the sound proposals does not make the unresolved line disappear.

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Emma: For this team's first try, I'd leave that option off. I want them to learn what they're reviewing without their final posting step changing at the same time. Once that is familiar, combining the steps might suit them. The useful choice is whether they want that separate pause, not whether they trust every proposal or none of them.

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Alex: Then they can judge whether the proposed matches save useful work while keeping their existing decision to post. They don't need the combined step to get that benefit. But there's an important fork among the leftovers: are we still trying to identify payments already recorded, or is there a charge on the statement that hasn't been recorded at all? Finding a match and creating the missing entry are different jobs.

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Emma: Let's leave our uncertain payment alone and take another line: a recurring bank charge that hasn't been recorded yet. There's nothing to find among the existing entries for that charge, however patiently we search. Can the assistance help with that missing entry instead?

Alex: Yes, through a separate action on an existing reconciliation: Post difference to G/L account. You select the unmatched statement line, and Copilot can suggest an account by comparing the transaction description with the names of your G/L accounts. With that bank charge, you're asking where to post a new payment, not which existing payment it belongs to.

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Emma: And if I choose Keep it here, have I actually posted the charge? Or have I only saved a suggestion to deal with later?

Alex: Here you actually post it. In this difference-posting flow, you select a general journal template and batch. Keep it then posts new payments to the proposed G/L accounts and applies the corresponding statement lines to the resulting bank ledger entries. It is not parking a suggestion for later, and it is separate from that optional posting of the whole reconciliation.

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Emma: Then I'd pay attention to where the charge lands, not just whether the statement line is cleared. Suppose the suggested account sounds plausible, but isn't the one the business uses for that charge. Can I change it before accepting? And if that description comes back next month, can I avoid making the same correction again?

Alex: You can open that proposal and select a different G/L account before accepting it. That account correction belongs to this difference-posting flow, not the matching flow. Once you've checked the account the business actually uses for the charge, you can save the description's link to it as a Text-to-Account Mapping. When that text appears again, the mapping can reuse the account choice. I'd settle the account first, then save the mapping, rather than make a plausible suggestion recur.

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Emma: What if the description is just "charge"? Today's account could be right, but that same word might describe something different next month. I'd be happier saving a clearly identified recurring fee. With the vague text, aren't we at risk of repeating the wrong choice more efficiently?

Alex: With just "charge," I'd leave the mapping unsaved. We can correct today's account without turning that correction into a reusable rule. Your example changes what we know: we've identified this charge, but not what that word will mean next time. I'd keep the individual review there and save mappings for descriptions the team can reliably connect to the intended account.

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Emma: That's useful help even without saving a rule. And it's why this established feature deserves attention. Its release table records general availability in 2024, although some documentation still says preview. Those labels don't line up neatly. What should listeners check in their own environment before expecting to use the assistance we've described?

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Alex: Start with Business Central online; that's the documented scope. An administrator must activate the bank reconciliation capability specifically, so access to the new chat pane isn't the check for this feature. The current supported-language list includes English and Danish, but availability also depends on the environment's localization and the geography used for data and AI processing. I'd have the administrator check that combination for the environment the team actually uses.

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Emma: If ordinary matching already clears almost everything for a team, I wouldn't give them another routine just to use Copilot. In our example, the interesting comparison is the combined payment: how much effort goes into finding the entries by hand, versus checking the proposed group? I'd want to see whether it makes that stubborn part of the job easier, not simply whether it produces more suggestions.

Alex: And that comparison can legitimately favour the existing approach. If untangling the suggested group takes longer than finding the right payments the way the team already does, there's no reason to make it a required extra step.

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Posting dates that follow the work date

Emma: Here's a different bit of recurring work: updating the dates people are allowed to post to. Business Central 28 introduced date formulas for those limits, generally available from April 2026. Imagine a business that wants the current period open without someone remembering to change the settings each month. It also wants a closed period to stay closed. Alex, do formulas give it both?

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Alex: Not by themselves. The formula calculates the permitted range from the user's Work Date whenever a posting date is validated. That isn't necessarily today's calendar date, and users can change it in My Settings. So you can reduce the recurring work of maintaining dates, but the calculated boundary can move with the user's Work Date. If the requirement is a boundary that users cannot shift themselves, a fixed date is the relevant choice.

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Emma: Let's make "current month" concrete. If the employee's Work Date is March seventeenth, 2026, and the formulas allow the current month, which dates does that actually open?

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Alex: March first through March thirty-first, 2026. "Current month" means the month containing that Work Date. It does not mean the month on the calendar when you happen to read the setting.

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Emma: Suppose it really is March, but someone temporarily uses a February Work Date while dealing with older work. Nobody is trying to get around anything. Does that same "current month" rule now follow them into February, even though the business intended February to stay closed?

Alex: Yes, those calculated month boundaries move into February. Other effective posting restrictions can still matter, so that doesn't mean every February posting will be allowed. But this formula itself is following the employee's Work Date exactly as designed. It has no way to express the business's separate intention that February must remain closed. Your example shows why a convenient moving period and a fixed closing boundary are different requirements.

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Emma: Then I'd change the proposal, not abandon the convenience. Keep the earliest allowed date fixed after the closed period. If the business is comfortable with the flexibility, let a formula handle the latest allowed date. Can we combine them like that, or do both ends have to work the same way?

Alex: You can combine them exactly that way: a fixed From date and a formula for the To date. Each boundary gets its own choice. The important detail is that a fixed date and a formula are alternatives for the same boundary. Entering the formula clears its corresponding fixed date, and entering a fixed date clears the formula. You're choosing how each end works, not stacking two controls on the same end.

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Emma: Then my proposal needs that February example too. If the fixed start is March first, but the Work Date puts the calculated end in February, there's no date between those limits. Is that a sign the range doesn't fit this task, rather than a formula that's gone wrong?

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Alex: Exactly. With those boundaries, the calculated end falls before the fixed start. The formula can be doing the right calculation while the chosen range doesn't support the task. Before changing a restriction, I'd ask one thing: does this employee actually need to post into February, or are they only consulting February's information while doing work that should be posted in March?

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Emma: For our employee, it's the second case: looking at older information, but posting the current work in March. I don't want that to reopen February for ordinary day-to-day work. A designated finance colleague might still need to post an agreed closing adjustment there. Those are different needs; I wouldn't open the older period for everyone just to accommodate that one colleague.

Alex: That distinction fits a standard option: give the designated colleague a different posting period in User Setup. User-specific periods can override the period in General Ledger Setup, so the company-wide window need not be widened for everyone. I'd make that person's permitted dates an explicit choice for the agreed closing work. And because it is an override, don't assume the company's narrower dates will automatically cancel out a wider user setting.

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Emma: So looking only at the company setting could give us the wrong picture of that colleague's access. When they make the closing adjustment through a journal, do restrictions on the journal matter as well?

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Alex: They can. The documented sequence considers the user and company settings, then journal-template restrictions when the relevant template checks apply. So for that closing adjustment, I'd examine the colleague's effective period and the actual journal route they will use. A date visible in General Ledger Setup alone doesn't establish whether this person can post that entry through that journal.

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Emma: There's a wording mismatch worth flagging here. The archived release description says today's date; the current operational guide explicitly says Work Date. That's why I wanted to follow our March and February example rather than let "current" pass unnoticed. Which description should people use when planning this setup?

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Alex: I'd plan from the current operational guide's explicit Work Date explanation. We'll retain the wording discrepancy in the notes rather than quietly treat the two descriptions as equivalent. Before relying on the setup, verify the intended allowed and blocked dates with the relevant user and journal settings, including that changed Work Date. That is a check to perform, not a result we've established here.

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Emma: I still like the mixed approach for the right business. Someone decides when the fixed earliest date moves; that's a closing decision worth keeping deliberate. But if the latest allowed date can reasonably follow the Work Date, could the formula take that repetitive update off their hands? It doesn't have to remove every decision to be useful.

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Alex: Yes. In that design, the formula calculates the acceptable upper limit instead of someone retyping it each period, while moving the fixed lower limit remains a deliberate closing decision. If both ends must be centrally controlled, keeping both fixed is sensible. Where a moving upper limit fits the business's policy, the mixed approach can remove that piece of maintenance without pretending to replace the closing decision.

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Instructions for the subcontractor

Emma: Over in production, a colleague may have written exactly how an outsourced operation should be done. Purchasing still needs those instructions on the subcontractor's order, not waiting somewhere else for someone to copy them. Business Central 29 includes a generally available improvement for carrying them across, using Microsoft's Subcontracting extension. Where should that colleague put the instructions so they reach the right purchase line?

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Alex: Put them on the subcontracted routing operation: the particular production step being sent outside the business. When the production order is calculated or refreshed, those comments transfer to its corresponding routing operation. That gives production a place to review and adjust them for this order before purchasing creates the subcontract order. The reviewed comments then become text lines associated with the relevant purchase line. So the instructions travel with the step they describe, rather than being a loose note someone has to remember to find.

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Emma: Most of those instructions might be the same each time, with one detail different for this order. I'd like the team to reuse the dependable wording, not rebuild it from an old purchase order. But I wouldn't change everyone's standard instructions for one exception. Where do the reusable text and that particular adjustment meet?

Alex: The reusable wording can live on a subcontracting standard task. Selecting its code on the routing operation copies those comments onto that operation, where they can be edited. For your one-order exception, I'd make the particular adjustment on that production order's routing comments before creating the purchase order. That leaves a clear distinction between maintaining the usual instructions and adapting this job. The useful word here is "copies": don't plan around an assumed live link that updates every version of the text.

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Emma: This job needs a drawing as well. The colleague is already on the production order, so attaching it straight to that order's line looks like the obvious shortcut. Would that file then follow through to the purchase line?

Alex: Not through this documented route. A file added manually to the production order line does not transfer to the purchase line. So seeing the drawing attached there isn't enough to establish that purchasing will receive it. Where the attachment came from matters.

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Emma: Then my shortcut leaves purchasing with another search. Where should the colleague attach the drawing so it actually follows the job onto the purchase line?

Alex: Attach it to the routing, and enable both document-flow settings on that attachment: Document Flow Production and Document Flow Purchase. The file first transfers to the related production order line. When the subcontracting purchase order is created, it then transfers to the related purchase line. Both settings matter because you need that whole route, not just the first move into production.

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Emma: If the colleague notices the missing purchase-flow setting while looking at the production order line, can they change it there? Or do they need to go back to the attachment on the routing?

Alex: Back to the attachment on the routing. Those attachment settings are read-only on the production order line. Correcting the source is the place to start, but it doesn't establish that a purchase order already created has refreshed itself. I'd inspect the resulting purchase line and its actual attachment rather than infer the drawing arrived from the corrected setting alone.

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Emma: I'd follow that one step further. The person doing the work needs the right drawing and instructions, not reassurance that we can see them in Business Central. Before purchasing calls the job ready to send, what would you check at that final handoff?

Alex: I'd ask purchasing to open the actual order document and files they intend to send, and read them as the subcontractor would. Can you identify the operation, follow its instructions, and find the intended drawing revision in that package? That is more useful than checking the attachment count in Business Central. It doesn't assume printing or emailing automatically includes the file, and having the package ready still isn't evidence that the supplier received it.

Emma: And alongside that drawing, purchasing needs the written instructions. Where do those operation comments appear on the purchase order, so the person preparing the package knows where to look?

Alex: They appear as text lines linked to the relevant subcontracting purchase line, in the same order as the comments. Those text lines have zero quantity; they're instructions, not additional units being ordered. For example, an instruction about protecting a surface during an outsourced finishing step would sit with that step's purchase line. This works whether the purchase order is created directly from the production order or through the subcontracting worksheet.

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Emma: Then let's give purchasing two operations going to the same subcontractor. They'd prefer one order with both jobs, each with its own instructions. If they select both operations and create the order directly, do they get that single order?

Alex: Not with direct creation. Selecting two routing lines there creates two purchase orders, even when the subcontractor is the same. Your preference for one order points us toward the subcontracting worksheet instead. It lets purchasing review and batch-create the orders; when all the operations go to the same vendor location, they can be on one purchase order. Direct creation still makes sense for ordering a particular operation right away. It just doesn't provide the consolidation you're asking for.

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Emma: I'd take the combined order for the routine batch, but I wouldn't hold an urgent operation back just to keep the paperwork together. What needs to be in place for this workflow? Presumably a vendor and an attached drawing aren't the whole setup.

Alex: The foundation is Microsoft's Subcontracting extension and a manufacturing routing that identifies the outsourced step. That step uses a Work Center linked to the vendor, and the vendor needs a subcontracting location. The routing line must use Work Center, not Machine Center, because machine centers don't support the subcontractor assignment. The drawing describes the work, but those links identify which operation is being purchased from which subcontractor. Without that structure, attaching the drawing alone doesn't establish this workflow.

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Emma: Microsoft provides an assisted setup guide for subcontracting, too. With those links to get right, that sounds like a useful starting point. What does finishing the guide actually establish about our production step, and what still needs checking?

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Alex: Finishing saves the defaults and marks the guide complete. It also points you to the setup pages, which is useful, but it doesn't verify every routing, production bill of materials, price, vendor or location. For our finishing operation, I'd follow that particular step through to a proposed purchase order and check whether it represents the intended work with the right instructions. Completing the guide tells us the setup exercise reached its end, not that this order is ready for the supplier.

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Emma: That's the improvement I'd want purchasing to feel: not having to reconstruct the job from scattered messages and ask which instruction still applies. Give them the right material for this operation, and they can spend their attention on the handoff rather than the hunt.

Alex: And that starts with knowing who maintains the instruction you're reusing. I'd choose one representative operation, have that person confirm the source material, and follow it through to the package purchasing would send. Then the team can judge whether the handoff is clearer. They don't need to exercise every subcontracting feature to learn something useful from that first trial.

Recently used lookup values

Emma: Our last discovery is much smaller: choosing a value you've just used. Business Central 29 makes recently used values available in some lookup fields, not every field. That could be handy when the same familiar choice comes up repeatedly. But if I start typing instead of choosing from Recent, what happens to that list?

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Alex: Typing takes you back to Search. Recent gives you your own recently used choices in a field that supports it; it isn't a smaller list that you narrow by typing. Suppose you recognize a code you used a moment ago. You can select it from Recent. If instead you start entering part of the code, you've moved into searching. That change of mode explains why the list changes under your hands.

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Emma: If I type part of the code and then switch back to Recent, I might still see that text in the field. I'd be tempted to read the list as recent choices matching what I typed. Can I rely on that?

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Alex: No. The text can stay in the field when you return to Recent, but it doesn't filter those recent choices. A code appearing there isn't evidence that it matches the letters you entered. Choose Search when that match is what you need. You also can't sort the columns while viewing Recent; it's the recent-values view, not a filtered search result with a different heading.

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Emma: A familiar-looking code could be just convincing enough when you're moving quickly. I'd use Recent for "there's the one I need," not "that must be the one I searched for." It's a small convenience I'd happily take, once that distinction is clear.

Alex: And avoiding that extra search is enough of a benefit. If you recognize the value you need, choose it and carry on. Just make sure it represents the intended record, rather than choosing it because it happens to look familiar. Not every useful improvement needs to change the whole workflow.

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Emma: What I'm taking from today is that I'd rather start with the bit of work someone wants help with than with everything a feature might do. Less searching or less copying can be worthwhile on its own. Then ask what the person still needs to decide, and make room for that decision. We don't have to automate the whole job to make it easier. The episode notes have our sources, availability qualifications and optional technical detail if you want to explore further. Thanks for spending this time with Alex and me, and for listening to Central Perspectives. Goodbye.