Dynamics 365 Business Central and Microsoft 365

Empower people to be more **collaborative**, **productive**, and **impactful** with the power of collaborative applications.

More collaboration

Collaborate in the apps where teams work best. Connect Business Central to Outlook, Excel, and Teams, and work seamlessly together with timely data.

More productivity

Stay in the flow of work. Get the data employees need in the tools they prefer without switching applications.

More impact

Accelerate decision-making with embedded guidance and business insights delivered directly to your employees within the tools where work is done.

When Business Central and Microsoft 365 work together, small and medium-sized businesses can boost productivity and redefine how work gets done. With data delivered directly to familiar apps like **Outlook**, **Excel**, and **Teams**, employees get the information they need without switching between applications.
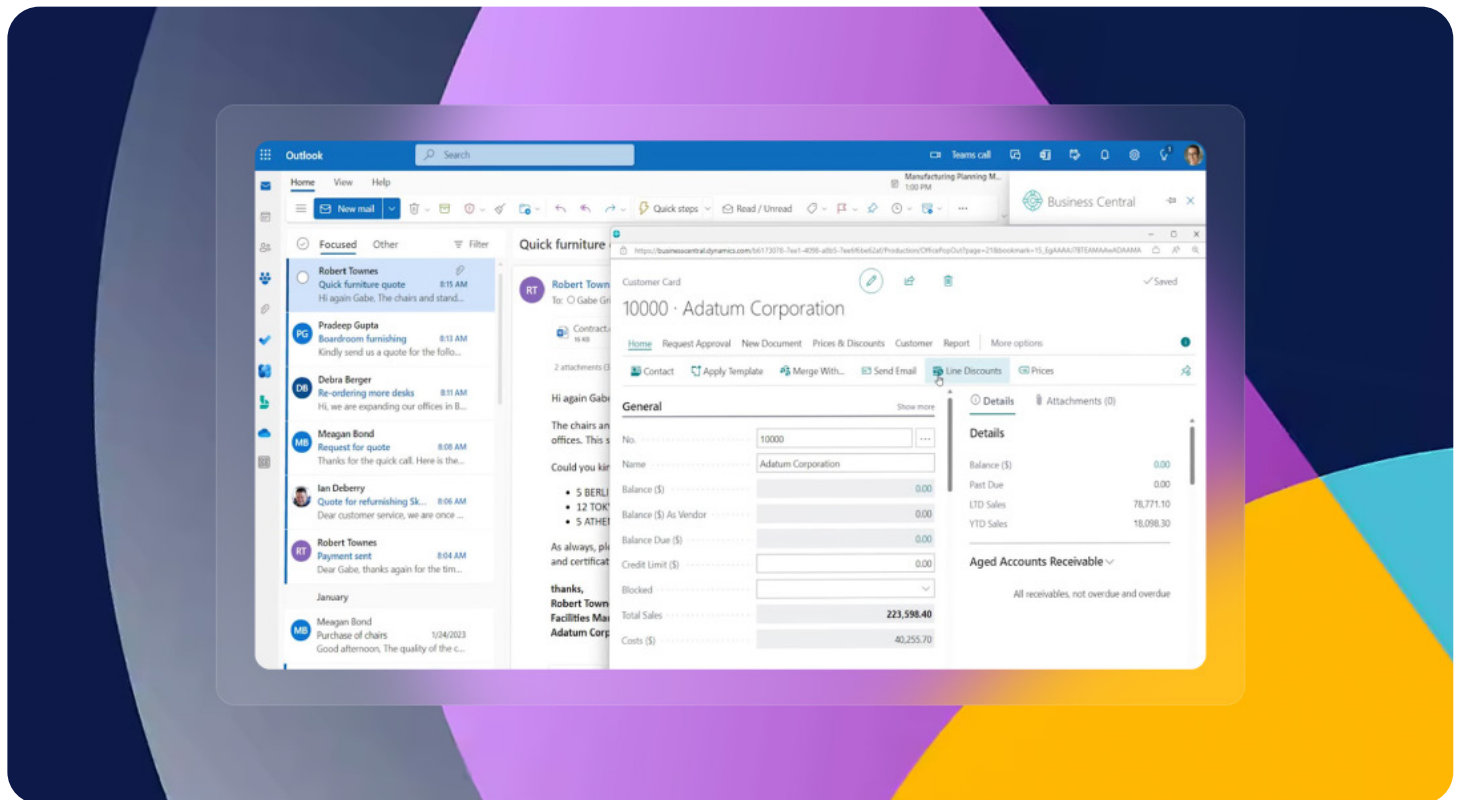
"The cost of switching [between apps] is little over two seconds, and the average user toggled between different apps nearly 1,200 times each day. That means they spent just under four hours a week reorienting themselves after toggling to a new application. Annually, that adds up to five working weeks, or 9% of their time at work."

How Much Time and Energy Do We Waste Toggling Between Applications?
Rohan Narayana Murty, Sandeep Dadlani, and Rajath B. Das

Microsoft Outlook

More impact with Business Central + Outlook

At the core of most businesses lies the unwavering commitment to deliver exceptional products and services to its customers. To achieve this goal, businesses must foster strong and meaningful relationships with their clients, vendors, and stakeholders. With Business Central and Outlook working together, employees gain valuable business insights delivered directly to their inboxes so they can save time while staying focused on delivering extraordinary experiences.

Stay in the flow of work

Use templates to quickly send payment reminders, order confirmations, and other emails directly from Business Central connected to your shared mailbox.

Enhance customer experience directly from your inbox

Connect real-time data from Business Central to Outlook. Save time with visibility into customer and vendor information like sales, purchase details, and more without leaving your inbox.

Go from quote to cash without leaving Outlook

Set up customers or vendors, create quotes, submit invoices, and more from within Outlook so you can focus on the task at hand.
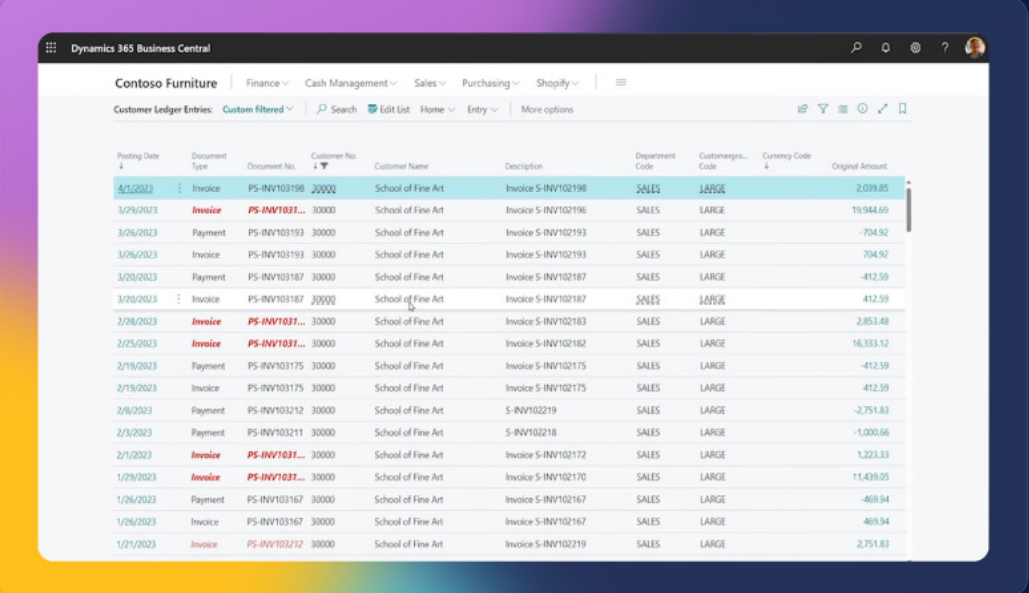
✔ Try this

When reading a customer email in Outlook, select the Business Central icon to open *Contact Insights*. From the side panel, create a new sales quote and choose *Attach*. Business Central assists in composing a reply that includes a PDF attachment of the quote using your company's preferred template.

⊠ Microsoft Excel

More productivity with Business Central + Excel

Employees often find themselves working in specific applications that align with their roles and responsibilities. For finance and operations teams, Excel is a fundamental tool that plays a pivotal role in their daily tasks. Enabling these teams to maximize their productivity within their preferred application can lead to significant productivity gains.

Simplify daily tasks

Export any Business Central data to an Excel worksheet to capture data snapshots or share for review. Save time by bulk updating records in Excel and uploading the revised records to Business Central with just a few clicks.

Go from raw data to insights faster

Get timely operational insights from Business Central as Excel reports and adapt quickly by customizing report layouts as Excel worksheets. Easily analyze transactions and business data using pivot tables, charts, and calculations to get answers quickly.

Collaborate in the tools where teams work best

Streamline team-based activities like budgeting and planning with multi-player co-authorship and functionality. Create, edit, and access Excel documents as a team, then publish the final outcomes back to Business Central.
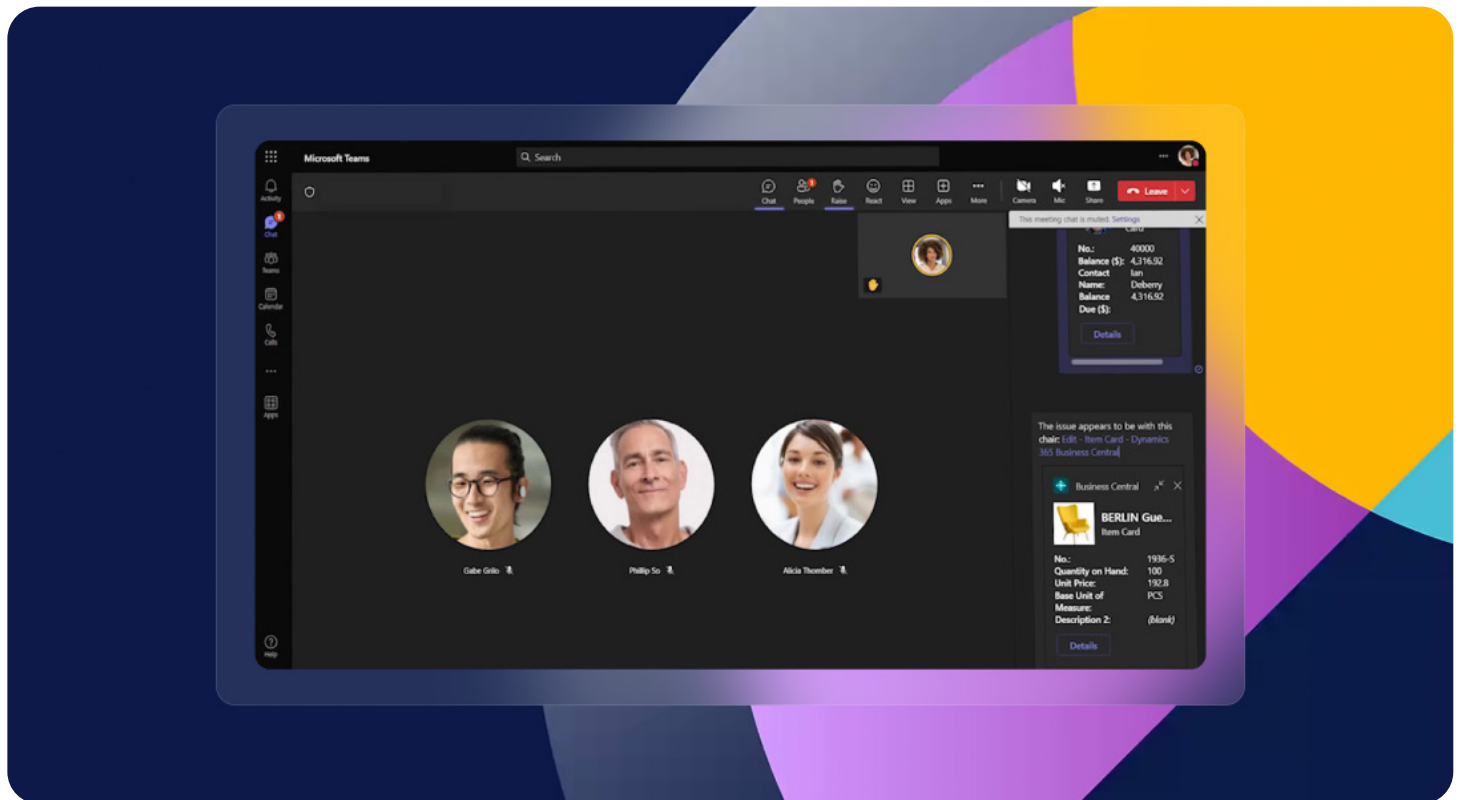
✔ **Try this**

After initiating a new budget for your ledger accounts in Business Central, select *Export to Excel*. Then, work together in Teams to collaborate and co-author in real time during a Teams meeting. Once budgeting is complete, import the data back into Business Central to begin comparing it with your general ledger actuals.

Microsoft Teams

More collaboration with Business Central + Teams

Modern workplaces are challenged by fragmented data and communication tools. Employees often find themselves juggling various apps and struggling to share timely information, making collaboration difficult. With Microsoft Teams connected to Business Central, your organization can efficiently share and interact with real-time data, transforming Teams into a centralized hub for all your daily operations.

Make data accessible and collaborative

With Teams connected to Business Central, timely data can be shared in group chats or channels, transforming Teams into the hub for all projects and daily operations that unite employees, processes, and the data they need to work together.

Take action from the app you prefer

From Business Central, quickly share data to jumpstart conversations in Teams. From Teams, stay in the flow of work by viewing and editing business data without having to switch apps.

Streamline collaboration across departments

Empower each department to self-serve by unlocking the data they need to work better together, even without a Business Central license. Get read-only access to Business Central data in Teams at no additional cost with your Microsoft 365 license.

✔ **Try this**

When scheduling customer calls from Teams, use the search bar to find business contact details and related information, such as overdue payments and history of interactions.