



POWERED BY  DUG

# DYNAMICS CON

# LIVE

MAY 2024

The central graphic is a large, multi-colored starburst shape. Inside the starburst, the text "POWERED BY" is in yellow, followed by a logo consisting of three colorful arrows (purple, green, and pink) pointing towards each other, and the word "DUG" in yellow. Below this, the words "DYNAMICS CON" and "LIVE" are written in large, bold, yellow, 3D-style block letters with colorful outlines. At the bottom of the starburst, the date "MAY 2024" is written in yellow. The background of the starburst is a gradient of purple, pink, and yellow.



# Is this the Right Report

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**Brad Hearn**

**Senior Analyst**

**Liberty Grove Software**



# Business Central Report

- Business Central has improved its Reporting
- Many different types of reports and capabilities available
- Which report is best depends



# Business Central Report

Make sure your report has:

1. The right information
2. At the right time
3. In the right format
4. Using the right delivery method





# Business Central Report

Strategies to get to the **right report**:

1. Understand the Business Drivers
2. Know your User



# Understand the Business Drivers



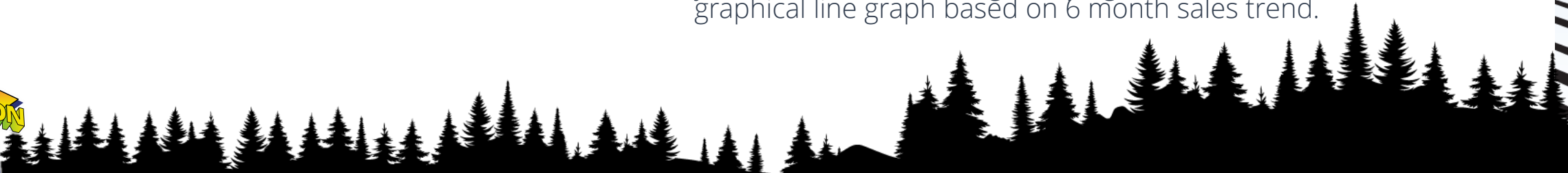
# Say 'Why'

➤ What is the **true** business question that is trying to be answered?

➤ Root Cause Analysis

➤ 5 Why's

- We want a sales order report
- Why?
- We want to know the Customer Order details
- Why?
- We want to check for particular items
- Why?
- To know if certain items sales are going up or down over the last 6 months
- Why?
- To see the results of our targeted marketing campaigns
- Why
- We want to see which marketing campaign is working
- ✓ So perhaps a better solution is an on demand report that allows you to select a marketing Campaign and track certain items with graphical line graph based on 6 month sales trend.



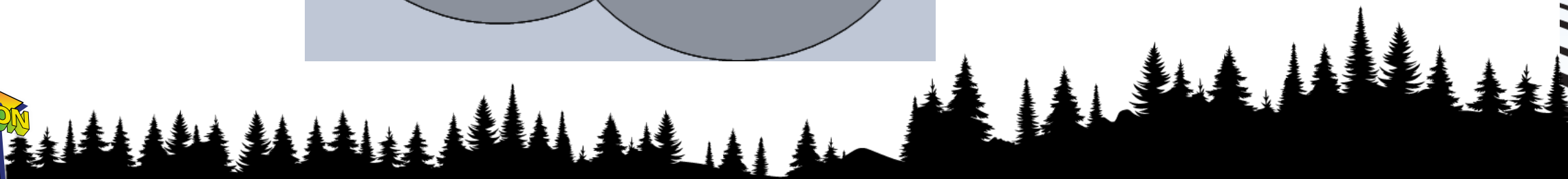
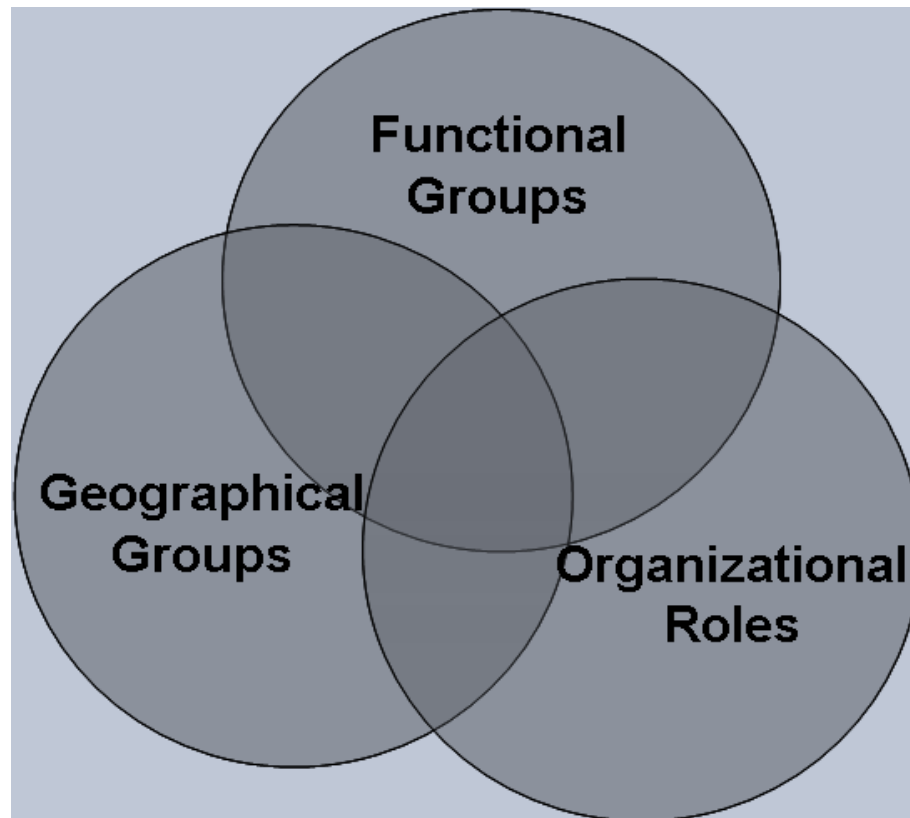


# Know your User



# One Shoe Does Not Fit All

Different Business Users Require Different Reporting Capabilities



# User Profiles

Information Producers and Consumers

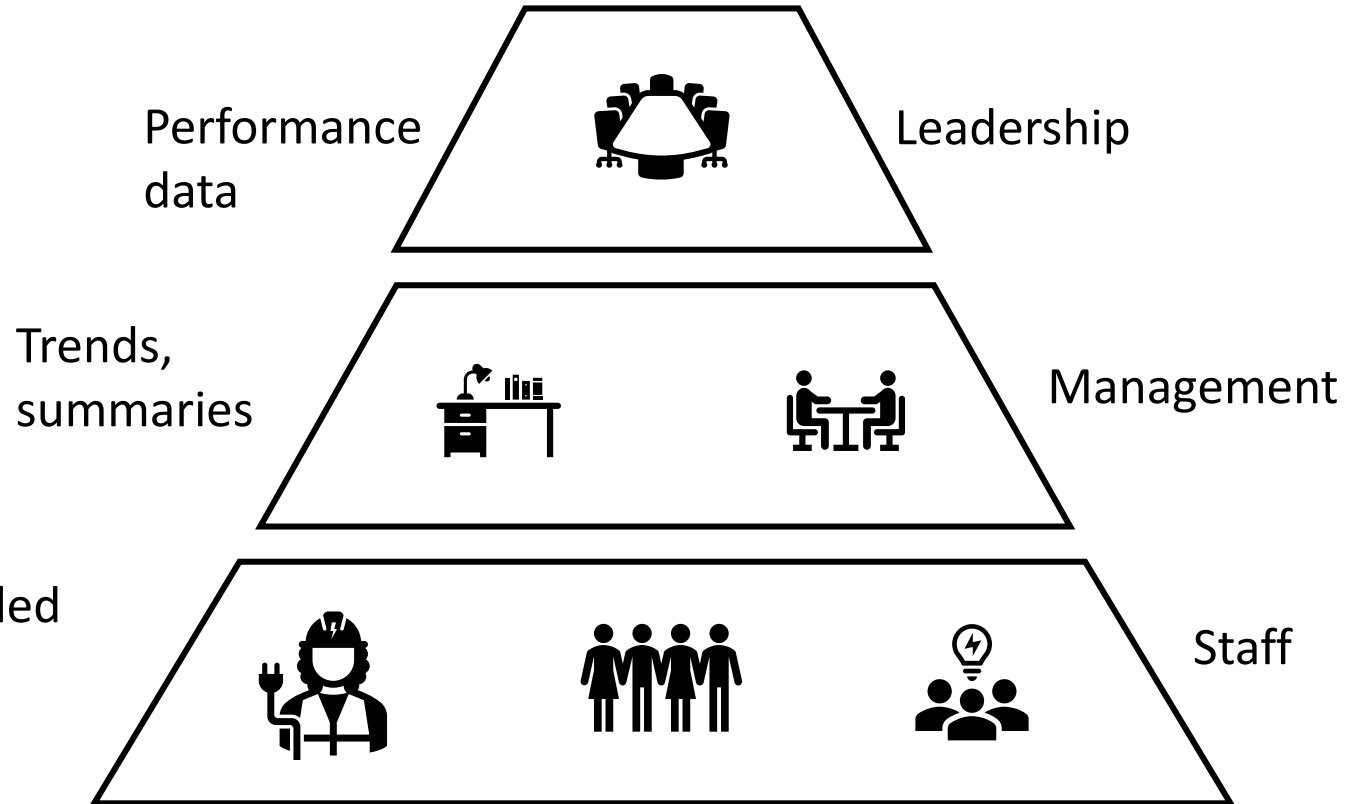
- Operations
- Analysts
- Managers
- Executives





# User Profiles

Data aggregation ↑



↑ Organizational hierarchy

**Typical ways to consume data**

KPIs  
Dashboards  
Financial reports

Managerial reports  
Ad-hoc analysis

Operational reports  
On-screen task data

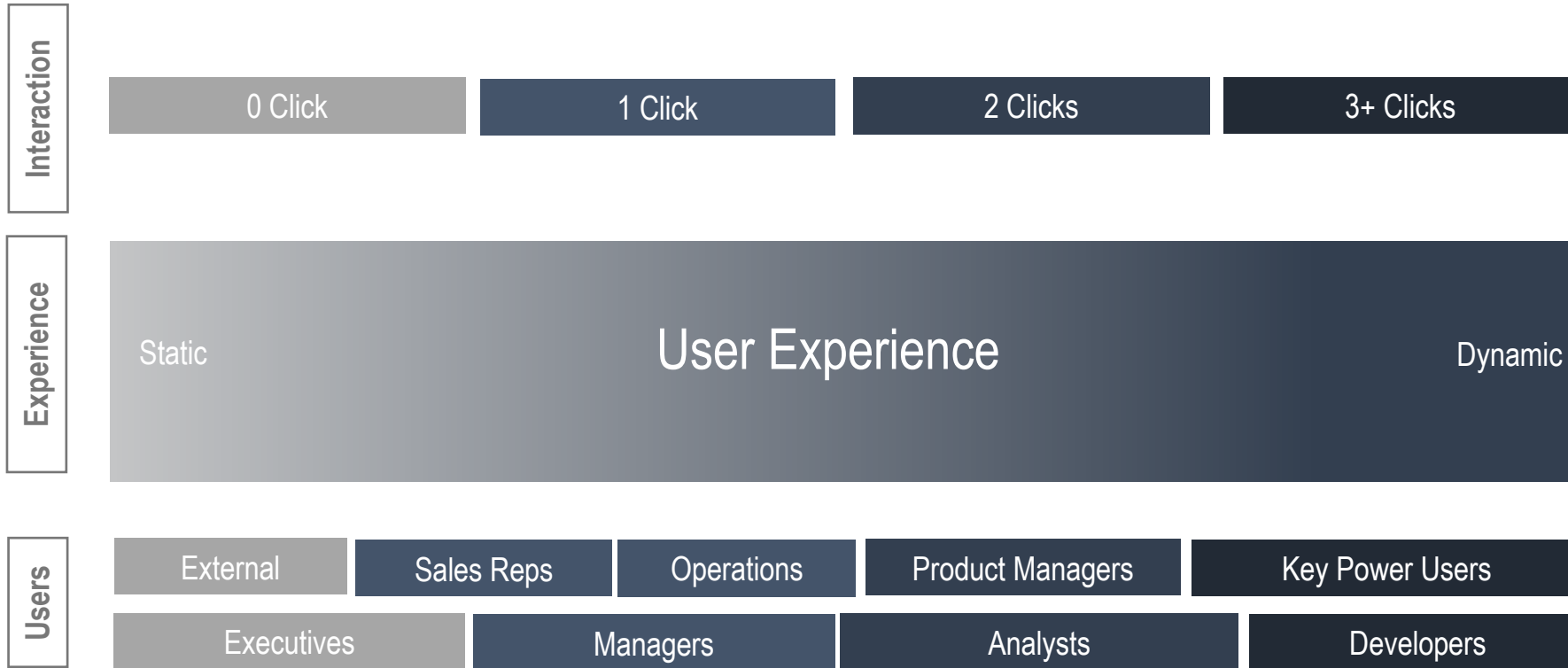
# User Tiers

## Tiered approach to Business Intelligence

- Each tier addresses a level of user ability and need
- Each tier has an interface tied to the user's ability
- Differing levels of function and data access
- Supports all levels of technical ability, frequency of access, and complexity

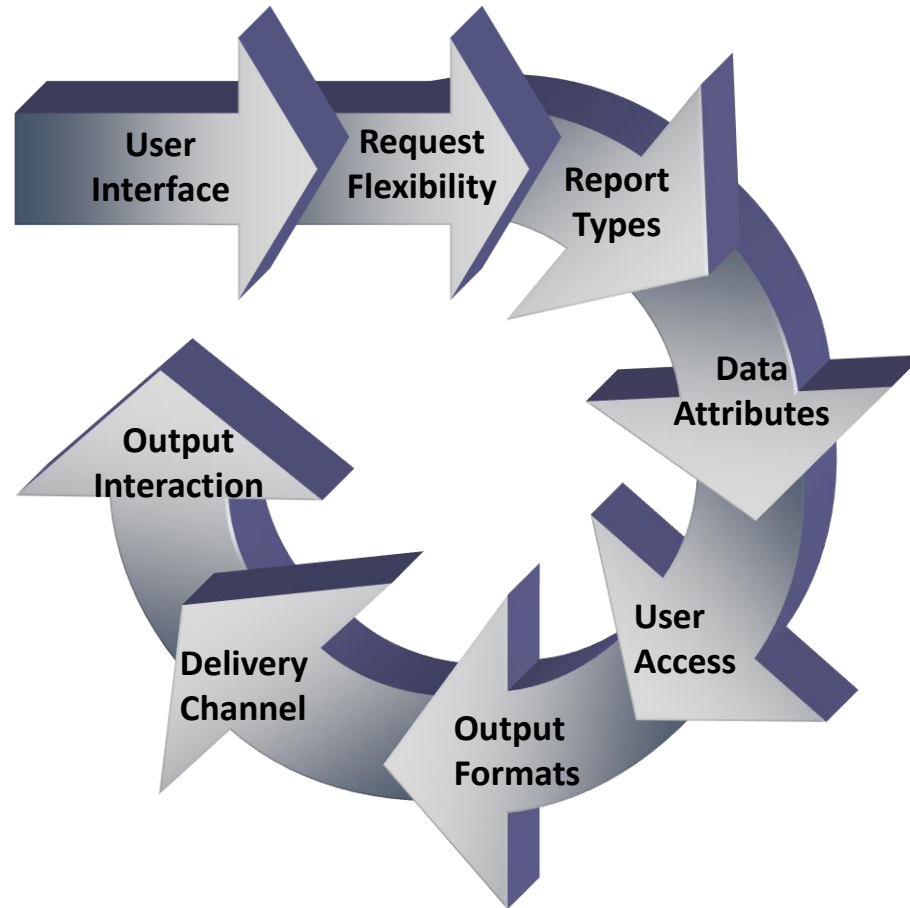


# User Click Continuum





# Reporting Attributes



# Reporting Attribute Matrix

User Interface	Request Flexibility	Report Types	Data Attributes	User Access	Output Formats	Delivery Channel	Output Interaction
E-Mail	Fixed Standard Reports	Comparison	Summary Level	Online/Immediate	HTML	Web Browser	Static Report
Business Central	Parameterized Standard Reports	Trend	Detail Level	Scheduled	PDF	E-Mail	Automatic Drill Down
CRM	System Default Parameters	Segmentation	Real Time	Subscription	Excel	FTP Site	Flexible Drill Down
Power BI Web Portal /Dashboard	Report Default Parameters	Matrix Reports	Staged	Alerts	Word	App	Drill Across
App	User Default Parameters	Percentile Analysis	Point in Time	Offline	XML	Mobile Device	Drill Up
Excel	Data Driven Parameter Selection	Rankings	Historical	Security	CSC	Printer	Drill Through
Multilingual User Interface	Interactive Parameter Selection	Profile Reports	Data Volume		Text file	Excel	Data Relationships
	GUI Development Environment	Vertical Formats	Hierarchy Roll-Up (presumed, recursive, exploded)		Tabular		Re-sorting
	Text Editor	Financial Statements	Time Periods		Charts		Refresh
		KPIS	Sort Order		Multilingual Output		OALP Analysis
		Geographic Analysis	Multilingual data		Conditional Styling		Search
		Heat Map	Data Source				Print
			Business Rules				Annotate



# Identify the Report they need







# **Operational Reports**

# Operations

- Data Producers
- Information consumers
- Operational focused
- Low level view
- Detail data required
- Not necessarily technically skilled
- Data available off site



# Operational Reports – RDLC, Word

# Operation Reports

The screenshot displays the Microsoft Dynamics 365 Business Central web interface. The browser address bar shows the URL: <https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox?company=Cronus>. The top navigation bar includes the company name 'Cronus' and several menu items: Sales, Purchasing, Inventory, Posted Documents, Commissions, and Shopify. The 'All Reports' menu item is highlighted with a red rectangular box. Below the navigation bar, there are links for Sales Orders, Items, Customers, Item Journals, Sales Journals, Cash Receipt Journals, Transfer Orders, and Recurring Sales Lines. The main content area features a headline: 'Want to learn more about Business Central?' and a list of actions: '+ Sales Quote', '+ Sales Invoice', '+ Sales Order', '+ Sales Return Order', '+ Sales Credit Memo', and '+ Tasks'. The 'Insights' section is divided into 'Learning and Onboarding' and 'Activities'. The 'Learning and Onboarding' section includes 'ClickLearn Actions' with two cards: 'Open Repository' (0) and 'Activate Assist' (0). The 'Activities' section includes 'For Release' with three cards: 'Sales Quotes - Open' (2), 'Sales Orders - Open' (9), and 'Completely Re... from Stock' (0). Below this, there is a 'Sales Orders Released Not Shipped' section with four cards: 'Ready To Ship', 'Partially Shipped', 'Delayed' (1), and 'Average Days Delayed'. The bottom of the screenshot shows the Windows taskbar with the date and time: 4:40 PM, 5/7/2024.





# Operational Reports

The screenshot displays the Microsoft Dynamics 365 Business Central web interface. The browser address bar shows the URL: <https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox?company=Cronus>. The page header includes the text "Dynamics 365 Business Central" and "Environment: Sandbox".

The main navigation area is divided into several sections:

- Cronus** | **All** | Reports & Analysis | Administration | Find | ...
- Purchasing** (13)
  - Commissions (14)
  - WMS Express (2)
  - Shopify (9)
- DocXtender**
  - Setup (1)
- Finance**
  - General Ledger (11)
  - Cash Management (11)
  - Cost Accounting (9)
  - Receivables (14)
  - Payables (10)
  - Fixed Assets (9)
  - Inventory (7)
  - Setup (11)
- Human Resources**
  - Employees (3)
  - Setup (11)
- Purchasing**
  - Purchasing (15)
  - Planning (16)
  - Inventory & Costing (8)
  - Setup (17)
- Sales And Marketing**
  - Sales (8)
  - Customers
  - Contacts
- Manufacturing**
  - Product Design (6)
  - Capacities (6)
  - Planning (8)
  - Operations (10)
  - Costing (6)
  - Setup (11)
- Purchasing Agent**
  - Home (18)
  - Posted Documents (5)
- Service**
  - Contracts (12)
  - Planning & Dispatching (4)

The bottom of the image shows a Windows taskbar with the date and time "4:43 PM 5/7/2024" and a weather widget indicating "72°F Partly sunny".



# Operational Reports

Dynamics 365 Business Central

Cronus US Brad

All

Reports & Analysis

Administration

Find

Explore more roles

...

## ← Sales And Marketing

### Sales (2)

- Budgets & Analysis (5)
  - Sales Budgets
  - Sales Analysis Reports
  - Sales Analysis by Dimensions
  - Item Dimensions - Detail
  - Item Dimensions - Total
- Reports (5)
  - Sales Deferral Summary
  - Salespeople/Teams (6)
    - Salesperson Tasks
    - Salesperson Commission
    - Salesperson Opportunities
    - Team Tasks
  - Salesperson Statistics by Inv.
  - Salesperson Statistics by Inv.
- Contacts (5)
- Customers (11)
- Opportunities (3)

### Order Processing (1)

- Reports (5)
  - Customer - Order Detail
  - Sales Reservation Avail.
  - Customer - Sales List
  - Customer/Item Statistics
  - Customer - Order Summary

### Marketing (1)

- Campaign - Details

### Inventory & Pricing (1)

- Reports (8)
  - Item Charges - Specification
  - Nonstock Item Sales
  - Inventory Order Details
  - Inventory - Sales Back Orders
  - Item Substitutions
  - Assemble to Order - Sales
  - Availability Projection
  - Sales History

### Setup (1)

- Sales Analysis (1)
  - Sales Analysis by Dimensions



# Operational Reports - Parameters

Salesperson Opportunities 🔖 ↗ ✕

Printer ..... (Handled by the browser) ▾

Report Layout ..... ./CRM/Reports/SalespersonOpportunities.... ⋮

**Filter: Opportunity**

---

× Salesperson Code ..... ▾

× No. .... ▾

× Campaign No. .... ▾

× Contact No. .... ▾

× Creation Date ..... ▾

× Closed ..... ▾

× Date Closed ..... ▾

+ Filter...

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**Advanced >**

---

Send to... Print Preview & Close Cancel



# Operational Reports – Black Dots on White Paper

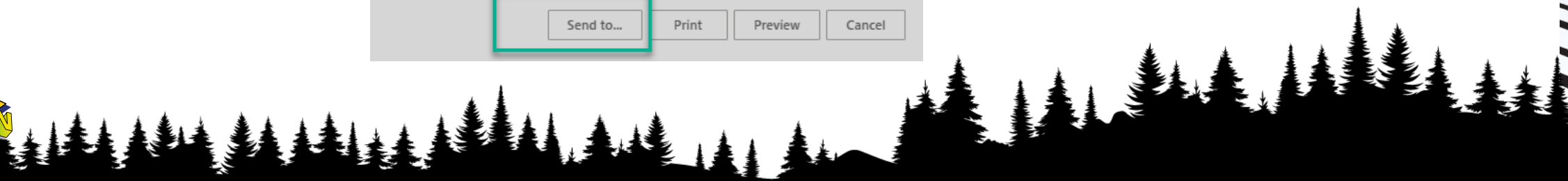
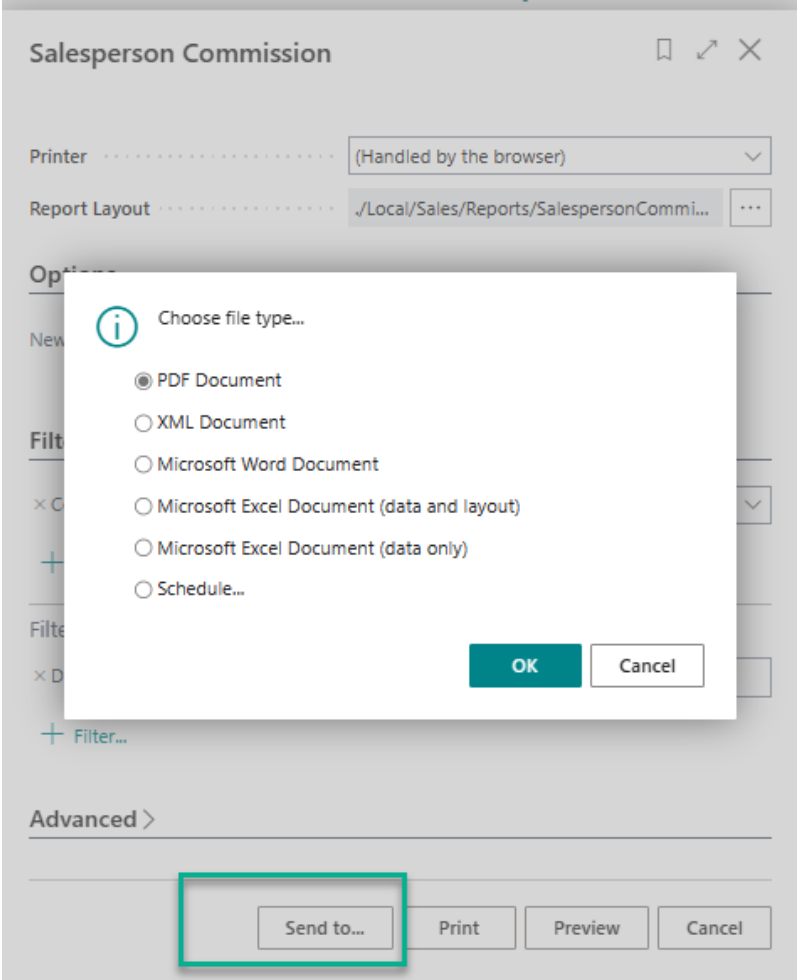
Salesperson - Opportunity  
Cronus US Brad

January 23, 2024  
Page 1  
BHEARN

No.	Description	Creation Date	Contact No.	Campaign No.	Status	Priority	Probability %	Chances of Success %	Completed %	Date Closed
<b>BD</b>										
<b>Bart Duncan</b>										
OP100022	Storage facilities	16-01-23	CT000011		In Progress	Normal	0.5	25	2	
OP100023	Swivel chair	15-11-06	CT000012		In Progress	Normal	48.5	95	2	
OP100040	30 chairs, blue	16-01-11	CT000014		Lost	High	0.0	0	100	16-01-26
<b>DC</b>										
<b>Debra L. Core</b>										
OP100024	Table lighting	15-12-09	CT000013		In Progress	Normal	16.0	30	2	
OP100025	Guest chairs for the receptio	16-01-26	CT000014		In Progress	Low	0.4	20	2	
OP100026	Storage system	15-11-21	CT000015		In Progress	High	0.2	10	2	
OP100039	Complete storage system	16-01-07	CT000013		Lost	Normal	0.0	0	100	16-01-18
<b>JR</b>										
<b>John Roberts</b>										
OP100017	Assembling furniture	16-01-06	CT000013		Won	Normal	100.0	100	100	16-01-22
OP100037	Conference table	15-09-21	CT000014		Lost	Normal	0.0	0	100	15-10-11
OP100038	New office system	15-09-17	CT000012		Lost	High	0.0	0	100	15-09-26
<b>PS</b>										
<b>Peter Sadow</b>										
OP100027	Desks for the service dept.	15-11-01	CT000015		Not Started	Normal	0.0	0	0	
OP100015	Assembling furniture	16-01-06	CT000011		Won	Low	100.0	100	100	16-01-26
OP100016	Assembling furniture	16-01-06	CT000012		Won	Normal	100.0	100	100	16-01-23
OP100018	Furniture to sales departmen	16-01-06	CT000015		Won	Low	100.0	100	100	16-01-22
OP100019	Furniture for the conference	16-01-01	CT000011		Won	Normal	100.0	100	100	16-01-13



# Operational Reports – more format choices



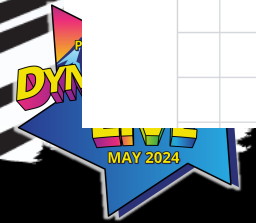


# RDLC, Word - Report Layouts

Report Layouts ✓ Saved 🔖 ✉ ↗

Report Layouts: All 🔍 Search 🔘 Analyse 📁 Manage 🆕 New ✎ Edit Info 📄 Run Report 🏠 Set Default 📄 Export Layout 📄 Replace Layout ⋮ 🔗 🔍 ☰

Report ID ↑	Report Name	Layout Name	Description	Defa...	Extension	Type ↑
1304	Sales - Quote	Standard Sales Quote (Word)	The Standard Sales Quote (Word) ...	<input checked="" type="checkbox"/>	Base Application by Microsoft	Word
1304	Sales - Quote	Standard Sales Quote - Blue (Word)	The Standard Sales Quote - Blue (...)	<input type="checkbox"/>	Base Application by Microsoft	Word
1304	Sales - Quote	Standard Sales Quote Email (Word)	The Standard Sales Quote Email (...)	<input type="checkbox"/>	Base Application by Microsoft	Word
1305	Sales - Confirmation	Standard Sales Order Confirmatio...	Detailed layout with all fields.	<input type="checkbox"/>	Base Application by Microsoft	RDLC
1305	Sales - Confirmation	Standard Sales Order Confirmatio...	Layout intended for an email body.	<input checked="" type="checkbox"/>	Base Application by Microsoft	Word
1305	Sales - Confirmation	Standard Sales Order Confirmatio...	Simple layout with most necessary...	<input type="checkbox"/>	Base Application by Microsoft	Word
1306	Sales - Invoice	Standard Sales Invoice (RDLC)	The Standard Sales Invoice (RDLC)...	<input type="checkbox"/>	Base Application by Microsoft	RDLC
1306	Sales - Invoice	Standard Sales Invoice (Word)	The Standard Sales Invoice (Word)...	<input checked="" type="checkbox"/>	Base Application by Microsoft	Word
1306	Sales - Invoice	Standard Sales Invoice - Blue (Wor...	The Standard Sales Invoice - Blue ...	<input type="checkbox"/>	Base Application by Microsoft	Word
1306	Sales - Invoice	Standard Sales Invoice Email (Word)	The Standard Sales Invoice Email (...)	<input type="checkbox"/>	Base Application by Microsoft	Word
1306	Sales - Invoice	Standard Sales Invoice - Tax Spec (...)	The Standard Sales Invoice - Tax S...	<input type="checkbox"/>	Base Application by Microsoft	Word
1307	Sales - Credit Memo	Standard Sales Credit Memo (RDLC)	The Standard Sales Credit Memo (...)	<input type="checkbox"/>	Base Application by Microsoft	RDLC
1307	Sales - Credit Memo	Standard Sales Credit Memo (Word)	The Standard Sales Credit Memo (...)	<input checked="" type="checkbox"/>	Base Application by Microsoft	Word
1307	Sales - Credit Memo	Standard Sales Credit Memo Email...	The Standard Sales Credit Memo ...	<input type="checkbox"/>	Base Application by Microsoft	Word
1308	Sales - Shipment	Standard Sales Shipment (RDLC)	The Standard Sales Shipment (RDL...	<input type="checkbox"/>	Base Application by Microsoft	RDLC
1308	Sales - Shipment	Standard Sales Shipment (Word)	The Standard Sales Shipment (Wo...	<input checked="" type="checkbox"/>	Base Application by Microsoft	Word
1308	Sales - Shipment	Standard Sales Shipment - Blue (...)	The Standard Sales Shipment - Blu...	<input type="checkbox"/>	Base Application by Microsoft	Word
1309	Return Receipt	Standard Sales Return Receipt (RD...	The Standard Sales Return Receipt...	<input type="checkbox"/>	Base Application by Microsoft	RDLC



# Yes - You can change

Dynamics 365 Business Central Environment: Sandbox

Report Layout Selection ✓ Saved

Search Analyse Edit List Select Layout Restore Default Selection Run Report Custom Layouts More options

Company

Company Name Cronus

Report ID ↑	Report Name	Layout Type	Layout Description
→ 101	Customer List	RDLC	CustomerList.rdlc
104	Customer - Detail Trial Bal.	RDLC	./Sales/Reports/CustomerDetailTrialBal.rdlc
105	Customer - Summary Aging	RDLC	./Sales/Reports/CustomerSummaryAging.rdlc
106	Customer Detailed Aging	RDLC	./Sales/Reports/CustomerDetailedAging.rdlc
107	Customer - Order Summary	RDLC	./Sales/Reports/CustomerOrderSummary.rdlc
108	Customer - Order Detail	RDLC	./Sales/Reports/CustomerOrderDetail.rdlc
109	Customer - Summary Aging Simp.	RDLC	./Sales/Reports/CustomerSummaryAgingSimp.rdlc
110	Customer - Labels	RDLC	./Sales/Reports/CustomerLabels.rdlc
111	Customer - Top 10 List	RDLC	./Sales/Reports/CustomerTop10List.rdlc
112	Sales Statistics	RDLC	./Sales/Reports/SalesStatistics.rdlc
113	Customer/Item Sales	RDLC	./Sales/Reports/CustomerItemSales.rdlc
114	Salesperson - Sales Statistics	RDLC	./Sales/Reports/SalespersonSalesStatistics.rdlc
115	Salesperson - Commission	RDLC	./Sales/Reports/SalespersonCommission.rdlc



# How to Change - Excel Layouts

Tell me what you want to do

Customer list

Go to Pages and Tasks

- Custom Views Lists

Go to Reports and Analysis Show all (4)

- Customer List Reports and Analysis
- Customer Listing Reports and Analysis
- Customer - Sales List Reports and Analysis

Search for 'Customer list'

- Search company data
- Search Help

Didn't find what you were looking for? Try [exploring pages](#) or [exploring reports](#)

Customer List

Printer (Handled by the browser)

Report

Filter

Choose file type...

- PDF Document
- XML Document
- Microsoft Word Document
- Microsoft Excel Document (data and layout)
- Microsoft Excel Document (data only)
- Schedule...

OK Cancel

Advanced >

Send to... Print Preview Cancel

# How to Change Excel Layouts

The screenshot displays the Microsoft Excel interface with the 'Table Design' ribbon active. The spreadsheet contains a table with the following data:

COMPANYNAME	Customer_TABLECAPTION	CustFilter	CustFilter	Customer_No	Customer_Customer_Posting_Group	Customer_Customer_Disc_Group	Customer_Invoice_Disc_Code	Customer
Cronus	Customer:			10000	DOMESTIC		10000	
Cronus	Customer:			20000	DOMESTIC		20000	
Cronus	Customer:			30000	DOMESTIC		30000	
Cronus	Customer:			40000	DOMESTIC		40000	
Cronus	Customer:			50000	DOMESTIC		50000	
Cronus	Customer:			C00010	DOMESTIC		C00010	
Cronus	Customer:			C00020	DOMESTIC		C00020	
Cronus	Customer:			C00030	DOMESTIC		C00030	
Cronus	Customer:			C00040	DOMESTIC		C00040	
Cronus	Customer:			C00050			C00050	
Cronus	Customer:			C00060	DOMESTIC		C00060	
Cronus	Customer:			C00070	DOMESTIC		C00070	
Cronus	Customer:			C00090	DOMESTIC		C00090	
Cronus	Customer:			C00100	DOMESTIC		COMPANY	

The interface includes a ribbon with tabs for File, Home, Insert, Share, Page Layout, Formulas, Data, Review, View, Automate, Help, Draw, and Table Design. The 'Table Design' ribbon is currently selected, showing options for Conditional Formatting, Format As Table, Cell Styles, Insert, Delete, Format, AutoSum, Clear, Sort & Filter, and Add-ins. The status bar at the bottom shows 'Workbook Statistics' and 'Give Feedback to Microsoft'.



# How to Change Excel Layouts

The screenshot displays the Microsoft Excel interface within a web browser. The browser tabs include "Liberty Grove Software - Home", "Dynamics 365 Business Central", and "Customer List (1).xlsx". The address bar shows a SharePoint URL. The Excel ribbon is set to the "PivotTable" tab, with various tool icons for PivotTables, Tables, Forms, Illustrations, Charts, Filters, and Links. The main workspace shows a PivotTable with the following data:

Customer_No_	Sum of Customer_Balance_LCY_
10000	30915.21
20000	5517.64
30000	2900.98
40000	5000
50000	1003.9
C00010	11008.8
C00020	0
C00030	0
C00040	0
C00050	0
C00060	0
C00070	0
C00090	0
C00100	0
<b>Grand Total</b>	<b>56346.53</b>

The "PivotTable Fields" task pane on the right side of the screen shows the following configuration:

- Filters:** (Empty)
- Rows:** Customer\_No\_
- Columns:** (Empty)
- Values:** Sum of Customer\_Balance\_LCY\_

The list of fields in the task pane includes: Customer\_TABLECAPTION\_\_\_\_CustFilter, CustFilter, Customer\_No\_ (checked), Customer\_Customer\_Posting\_Group\_, Customer\_Customer\_Disc\_Group\_, Customer\_Invoice\_Disc\_Code\_, Customer\_Customer\_Price\_Group\_, Customer\_Fin\_Charge\_Terms\_Code\_, Customer\_Payment\_Terms\_Code\_, Customer\_Salesperson\_Code\_, Customer\_Currency\_Code\_, Customer\_Credit\_Limit\_LCY\_ (checked), Customer\_Balance\_LCY\_ (checked), CustAddr\_1, CustAddr\_2, CustAddr\_3, CustAddr\_4, CustAddr\_5, and Customer\_Contact.

At the bottom of the Excel window, the status bar shows "Workbook Statistics" with "Average: 7512.870667", "Count: 32", and "Sum: 112693.06". The Windows taskbar at the very bottom shows the date and time as "4:58 PM 5/7/2024" and the weather as "71°F Mostly cloudy".





# How to Change Excel Layouts

The screenshot displays the Microsoft Excel application interface. On the left, the 'Home' ribbon is visible, with the 'Save As' option highlighted in a red box. The main workspace shows a 'Save As' dialog box with the title 'Save a Copy' and the instruction 'Save a copy of this workbook online.' Below this, a file explorer window is open, showing a list of files in the 'Downloads' folder. The file list includes various Excel files, such as 'Customer List Excel Layout Brad.xlsx' and several 'Default' files. The 'File name' field is set to 'Customer List Excel Layout Demo.xlsx' and the 'Save as type' is 'Microsoft Excel Worksheet (\*.xlsx)'. The 'Save' and 'Cancel' buttons are visible at the bottom right of the dialog.

Name	Date modified	Type	Size
Last week (1)			
Customer List Excel Layout Brad.xlsx	2024-01-19 12:45 PM	Microsoft Excel W...	27 KB
Last month (6)			
Default12_12_2023_11_53_54.xlsx	2023-12-12 11:54 AM	Microsoft Excel W...	97 KB
Default12_12_2023_11_47_38.xlsx	2023-12-12 11:47 AM	Microsoft Excel W...	23 KB
Default12_12_2023_10_19_32.xlsx	2023-12-12 10:19 AM	Microsoft Excel W...	7 KB
Default12_12_2023_9_04_44.xlsx	2023-12-12 9:04 AM	Microsoft Excel W...	8 KB
Default06_12_2023_10_39_33.xlsx	2023-12-06 10:39 AM	Microsoft Excel W...	7 KB
Default06_12_2023_9_21_51.xlsx	2023-12-06 9:21 AM	Microsoft Excel W...	8 KB
A long time ago (105)			
dk1 comm feb 2023.xlsx	2023-11-28 1:35 PM	Microsoft Excel W...	13 KB
QCYC How it works Nov 14, 2023.xlsx	2023-11-27 7:19 PM	Microsoft Excel W...	175 KB
Default23_11_2023_18_41_35.xlsx	2023-11-23 6:41 PM	Microsoft Excel W...	23 KB
Default23_11_2023_15_24_10.xlsx	2023-11-23 3:24 PM	Microsoft Excel W...	7 KB
Default23_11_2023_11_03_59.xlsx	2023-11-23 11:04 AM	Microsoft Excel W...	8 KB
ValidBCSalesOrders.xlsx	2023-11-21 3:39 PM	Microsoft Excel W...	37 KB
Default21_11_2023_14_43_22.xlsx	2023-11-21 2:43 PM	Microsoft Excel W...	53 KB
Default21_11_2023_14_40_49.xlsx	2023-11-21 2:40 PM	Microsoft Excel W...	59 KB
Default13_11_2023_13_24_55.xlsx	2023-11-13 1:24 PM	Microsoft Excel W...	8 KB
Commission Ledger Entry.xlsx	2023-11-07 10:01 AM	Microsoft Excel W...	4 KB
OfficePools-Fantasy-Hockey-Picklist-2024.xlsx	2023-09-29 11:26 AM	Microsoft Excel W...	75 KB

# How to Change Excel Layouts

### Add New Layout for a Report

Report ID ↑	Report Name
35	Document Entry
36	Fiscal Year Balan
37	Balance Comp. -
38	Trial Balance by F
→ 101	Customer List
104	Customer - Deta
105	Customer - Sum
106	Customer - Profit

Report ID ..... 101

Report Name ..... Customer List

Layout Name ..... Customer List Pivot

Description ..... Report Demo

Format Options ..... Excel

Available in All Companies



# How to Change Excel Layouts

Choose Excel layout file

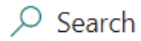


Report Layouts

✓ Saved

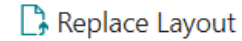
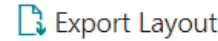
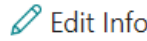


Report Layouts: All ▾



Analyse

Manage



Report ID ↑	Report Name	Layout Name	Description	Defa...	Extension	Type ↑
37	Balance Comp. - Prev. Year	./Finance/GeneralLedger/Reports/...	./Finance/GeneralLedger/Reports/...	<input checked="" type="checkbox"/>	Base Application by Microsoft	RDLC
38	Trial Balance by Period	./Finance/GeneralLedger/Reports/...	./Finance/GeneralLedger/Reports/...	<input checked="" type="checkbox"/>	Base Application by Microsoft	RDLC
101	Customer List	CustomerList.rdlc	CustomerList.rdlc	<input type="checkbox"/>	Base Application by Microsoft	RDLC
→ 101	: Customer List	Customer List Pivot	Report Demo	↔ <input checked="" type="checkbox"/>		Excel
104	Customer - Detail Trial Bal.	./Sales/Reports/CustomerDetailTri...	./Sales/Reports/CustomerDetailTri...	<input checked="" type="checkbox"/>	Base Application by Microsoft	RDLC



# How to Change Excel Layouts

Customer List

Printer

Report Layout

Use default values from

Filter: Customer

× No.

× Search Name

× Customer Posting Group

+ Filter...

Filter totals by:

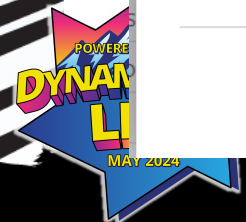
+ Filter...

The screenshot shows an Excel spreadsheet with a PivotTable. The PivotTable is located in the range A2:L17. The PivotTable Fields task pane is open on the right side of the screen, showing the following configuration:

- Filters:** (Empty)
- Rows:** Customer\_No
- Columns:** (Empty)
- Values:** Sum of Customer\_Balance\_LCY

The PivotTable data is as follows:

Customer_No	Sum of Customer_Balance_LCY
10000	30915.21
20000	5517.64
30000	2900.98
40000	5000
50000	1003.9
C00010	11008.8
C00020	0
C00030	0
C00040	0
C00050	0
C00060	0
C00070	0
C00090	0
C00100	0
<b>Grand Total</b>	<b>56346.53</b>



# Operational Reports – Account Schedules / Financial Reports



# Operational Reports – Account Schedules / Financial Reports

Dynamics 365 Business Central

Environment: Sandbox23

Financial Reports

Search Analyze + New Edit List Delete Edit Financial Report... Print... View Financial Report Edit Row Definition Edit Column Definition... Copy Financial Report Import Financial Report Export Financial Report Automate Fewer options

Name ↑	Description	Row Definition	Row Analysis View Name	Column Definition	Column Analysis View Name
→ ACC-CAT	Account Categories overview	ACC-CAT		PERIODS	
ANALYSIS	Capital Structure	ANALYSIS		BAL ONLY	
CASHFLOW	Calculation Of Cash Flow	CASHFLOW		CASHFLOW	
I_CACycle	Data for Cash Cycle Chart	I_CACycle		PERIODS	
I_CASHFLOW	Data for Cash Flow Chart	I_CASHFLOW		PERIODS	
I_INCEXP	Data for Income & Expense Chart	I_INCEXP		PERIODS	
I_MINTRIAL	Data for Reduced Trial Balance Info Part	I_MINTRIAL		PERIODS	
M-BALANCE	Balance Sheet	M-BALANCE		M-BALANCE	
M-CASHFLOW	Cash Flow Statement	M-CASHFLOW		M-NETCHANG	
M-INCOME	Income Statement	M-INCOME		M-NETCHANG	
M-RETAIND	Retained Earnings	M-RETAIND		M-NETCHANG	
REVENUE	Revenues	REVENUE	REVENUE	BUDGANALYS	





# Operational Reports – Account Schedules / Financial

- Default and create your own

M-BALANCE ✓ Saved

Financial Report | Search Home Definitions Column Period Export to Excel | More options

Recalculate Revert to defaults Print... Edit defaults Hide options

**M-BALANCE - Balance Sheet - M-BALANCE - M-BALANCE**

Options

Name ..... M-BALANCE View by ..... Day

Description ..... Balance Sheet Date Filter ..... 23-12-14

Row Definition ..... M-BALANCE ... Show All Lines .....

Column Definition ..... M-BALANCE ...

Dimensions Show more

Department Filter .....  ... G/L Budget Filter .....  ...

Customergroup Filter .....  ...

Row No.	Description	Balance
→ P0001	Assets	70,885.68
P0002	Current Assets	-
P0003	Cash	75,549.23
P0004	Accounts Receivable	-
P0005	Prepaid Expenses	-
P0006	Inventory	43,842.60
F0007	Total Current Assets	119,391.83
P0008	Fixed Assets	-
P0009	Equipment	-
P0010	Accumulated Depreciation	-
F0011	Total Fixed Assets	-
F0012	Total Assets	190,277.51
P0013		-
P0014	Liabilities	-
P0015	Current Liabilities	59,271.71



# Operational Reports - Account Schedules / Financial Reports



Row definition

Column definition

Financial report



List Pages

# Operational Reports - List Pages

Posting Date	Entry Type	Document Type	Document No.	Source Type	Source No.	Item No.	Description	Department Code	Customer Code	Loc... Code	Lot No.
2021-12-15	Positive Adj...		TEST			1900-S				BLUE	-
2020-12-02	Transfer	Transfer Receipt	109007			1000				PORT	-
2020-12-02	Transfer	Transfer Receipt	109007			1000					-
2020-12-02	Transfer	Transfer Shipment	108009			1000					-
2020-12-02	Transfer	Transfer Shipment	108009			1000				FACT...	-
2020-12-01	Purchase	Purchase Receipt	107013	Vendor	40000	1000				FACT...	-
2020-12-02	Purchase	Purchase Receipt	107011	Vendor	40000	1000				FACT...	-
2020-12-02	Purchase	Purchase Receipt	107010	Vendor	30000	1000				PORT	-
2020-10-09	Purchase	Purchase Receipt	107009	Vendor	40000	1000				FACT...	-
2020-09-22	Sale	Sales Shipment	S-SHPT102005	Customer	10000	1000					-
2020-09-22	Purchase	Purchase Receipt	107008	Vendor	40000	1000					-
2020-10-04	Transfer	Transfer Shipment	108008			1000				ON ...	-
2020-10-04	Transfer	Transfer Shipment	108008			1000				PORT	-
2020-10-03	Transfer	Transfer Receipt	109006			1000				PORT	-
2020-10-02	Transfer	Transfer Receipt	109006			1000					-



# List Pages - Filter

**Views**

\*All

Filter list by:

× Entry Type

Sale

+ Filter...

Reset filters

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Department Code	Customergro... Code	Location Code	Quant
2023-12-14	Sale	Sales Ship...	S-SHPT102...	1900-S		SALES	SMALL	MAIN	
2023-01-27	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	SMALL		
2023-01-22	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	SMALL		
2023-01-21	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	LARGE		
2023-01-18	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	LARGE		
2023-02-15	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	MEDIUM		
2023-02-10	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	MEDIUM		
2023-02-05	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	MEDIUM		
2023-01-27	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	MEDIUM		
2023-01-27	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	MEDIUM		
2023-01-22	Sale	Sales Ship...	S-SHPT102...	1969-W		SALES	MEDIUM		
2023-02-15	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	SMALL		
2023-02-05	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	SMALL		
2023-01-26	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	SMALL		
2023-01-21	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	SMALL		





# List Pages - Sort

Dynamics 365 Business Central

Environment: Sandbox23

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Item Ledger Entries: All | Search | Analyse | Find entries... | Entry | Order Tracking | Application Worksheet | More options

Views: \*All

Filter list by: Entry Type: Sale

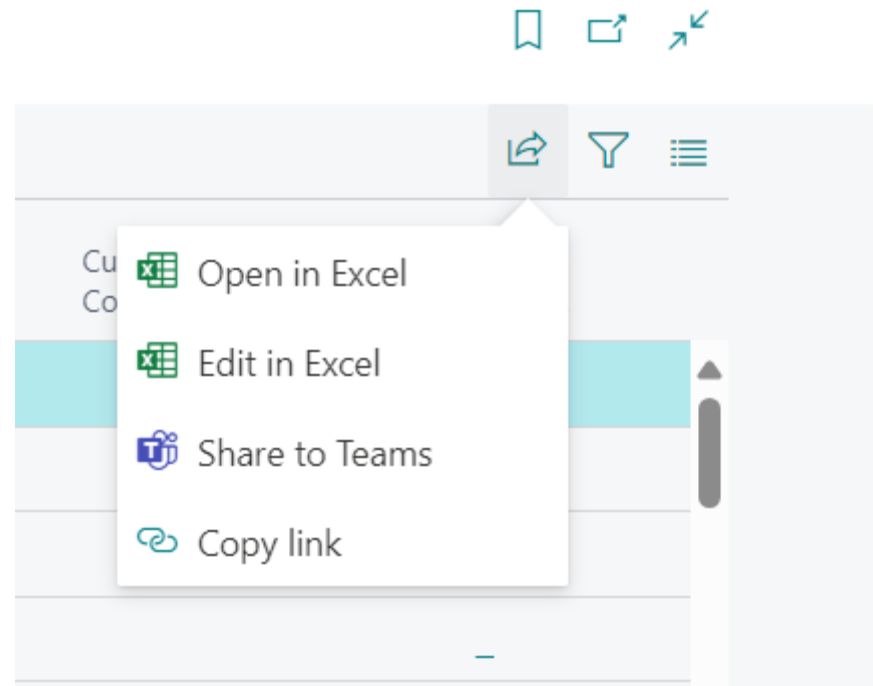
Reset filters

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Department Code	Customergro... Code	Location Code	Quant
2023-12-14	Sale	Sales Ship...	S-SHPT102...	1900-S		SALES	Ascending	MAIN	
2023-01-27	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	Descending		
2023-01-22	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	Filter...		
2023-01-21	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	Filter to this value		
2023-01-18	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	Clear filter		
2023-02-15	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	Show Details		
2023-02-10	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	What's this?		
2023-02-05	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	MEDIUM		
2023-01-27	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	MEDIUM		
2023-01-27	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	MEDIUM		
2023-01-22	Sale	Sales Ship...	S-SHPT102...	1969-W		SALES	MEDIUM		
2023-02-15	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	SMALL		
2023-02-05	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	SMALL		
2023-01-26	Sale	Sales Ship...	S-SHPT102...	1953-W		SALES	SMALL		
2023-01-21	Sale	Sales Ship...	S-SHPT102...	1965-W		SALES	SMALL		



# Operational Reports – List Pages

- Open or Edit in Excel
- Share to Teams
- Copy Link



# Operational Reports – List Pages

➤ Edit in Excel

The screenshot displays the Microsoft Dynamics 365 interface with an Excel spreadsheet open. The spreadsheet contains a table of 'Item Ledger Entries' with columns for Posting Date, Entry Type, Document Type, Document No., Document Line No., Item No., Variant Code, Description, Return Reason Code, and Global Dimension. The data connector panel on the right shows the source as 'Item\_Ledger\_Entries\_Excel' and the field as 'Return Reason Code'. The interface includes a ribbon with tabs like Home, Insert, Share, Page Layout, Formulas, Data, Review, View, Automate, Help, Draw, and Table Design. The bottom of the screen shows the Windows taskbar with various application icons and the system tray.

Posting Date	Entry Type	Document Type	Document No.	Document Line No.	Item No.	Variant Code	Description	Return Reason Code	Global Dimension
2021-12-15	Positive Adjmt.		TEST		0	1900-S			
2020-12-02	Transfer	Transfer Receipt	109007		10000	1000			
2020-12-02	Transfer	Transfer Receipt	109007		10000	1000	Decription		
2020-12-02	Transfer	Transfer Shipment	108009		10000	1000			
2020-12-02	Transfer	Transfer Shipment	108009		10000	1000			
2020-12-01	Purchase	Purchase Receipt	107013		10000	1000			
2020-12-02	Purchase	Purchase Receipt	107011		10000	1000			
2020-12-02	Purchase	Purchase Receipt	107010		10000	1000			
2020-10-09	Purchase	Purchase Receipt	107009		10000	1000			
2020-09-22	Sale	Sales Shipment	S-SHPT102005		10000	1000			
2020-09-22	Purchase	Purchase Receipt	107008		10000	1000			
2020-10-04	Transfer	Transfer Shipment	108008		10000	1000			
2020-10-04	Transfer	Transfer Shipment	108008		10000	1000			
2020-10-03	Transfer	Transfer Receipt	109006		10000	1000			
2020-10-03	Transfer	Transfer Receipt	109006		10000	1000			
2020-10-03	Transfer	Transfer Shipment	108007		10000	1000			
2020-10-03	Transfer	Transfer Shipment	108007		10000	1000			
2020-10-03	Purchase	Purchase Receipt	107007		10000	1000			
2020-10-02	Transfer	Transfer Receipt	109005		10000	1000			
2020-10-02	Transfer	Transfer Receipt	109005		10000	1000			





# **Analysis Reports**

# Analysts

- Information providers
- Influence decisions
- Technically skilled
- Report builders
- Support all users
- Snapshot and real-time data required
- Summary and detail data required





# Analysis Views

# Enhanced List Pages - Analysis View

- Respects Filters defined on list view before turning on Analysis Mode

The screenshot shows the Dynamics 365 Business Central interface for 'Item Ledger Entries' in 'Analysis 1' mode. The table displays various transaction details, and the right-hand pane shows the 'Analysis Filters' and 'Values' sections.

Posting Date	Entry Type	Document Type	Document No.	Source Type	Source No.	Item No.	Description
2021-12-14	Positive Adjmt.		TEST			1900-S	
2020-12-01	Transfer	Transfer Receipt	109007			1000	
2020-12-01	Transfer	Transfer Receipt	109007			1000	
2020-12-01	Transfer	Transfer Shipment	108009			1000	
2020-12-01	Transfer	Transfer Shipment	108009			1000	
2020-11-30	Purchase	Purchase Receipt	107013	Vendor	40000	1000	
2020-12-01	Purchase	Purchase Receipt	107011	Vendor	40000	1000	
2020-12-01	Purchase	Purchase Receipt	107010	Vendor	30000	1000	
2020-10-08	Purchase	Purchase Receipt	107009	Vendor	40000	1000	
2020-09-21	Sale	Sales Shipment	S-SHPT102005	Customer	10000	1000	
2020-09-21	Purchase	Purchase Receipt	107008	Vendor	40000	1000	
2020-10-03	Transfer	Transfer Shipment	108008			1000	
2020-10-03	Transfer	Transfer Shipment	108008			1000	
2020-10-02	Transfer	Transfer Receipt	109006			1000	
2020-10-02	Transfer	Transfer Receipt	109006			1000	

Rows: 344 Total Rows: 344

**Analysis Filters:**

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Entry Type
- Document Type
- Document No.
- Source Type
- Source No.
- Item No.
- Description

**Values:**

- Sum(Inventory)
- Sum(Inventory b...)
- Sum(Quantity)



# Analysis View – Easy to Add/Remove Columns

The screenshot shows the Dynamics 365 Business Central interface. At the top, the browser address bar displays the URL: [https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox/?company=Cronus&page=38&dc=0&bookmark=C\\_IAAAAACHWAE](https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox/?company=Cronus&page=38&dc=0&bookmark=C_IAAAAACHWAE). The page title is "Item Ledger Entries".

The main content area features a table with the following columns: Posting Date, Entry Type, Document Type, Document No., Source Type, Source No., Item No., and Description. The table contains 344 rows of data. A summary bar at the bottom of the table indicates "Rows: 344" and "Total Rows: 344".

On the right side, there is a "Columns" pane with a search bar and a list of columns to be displayed. The "Pivot Mode" toggle is turned off. The "Analysis Filters" section is expanded, showing a list of filters with checkboxes: Posting Date, Posting Date Year, Posting Date Quarter, Posting Date Month, Entry Type, Document Type, Document No., Source Type, Source No., Item No., and Description. The "Row Groups" section is also visible, with a prompt to "Drag here to set row groups". The "Values" section at the bottom of the pane shows three summary items: Sum(Inventory), Sum(Inventory b...), and Sum(Quantity).

The Windows taskbar at the bottom shows the system tray with a temperature of 55°F, a search bar, and various application icons. The system clock in the bottom right corner displays "10:36 AM 5/10/2024".



# Analysis View – Add Filters

The screenshot shows the Dynamics 365 Business Central interface for the 'Item Ledger Entries' analysis view. The browser address bar shows the URL: [https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox/?company=Cronus&page=38&dc=0&bookmark=C\\_IAAAAACHWAE](https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox/?company=Cronus&page=38&dc=0&bookmark=C_IAAAAACHWAE). The page title is 'Item Ledger Entries' and the environment is 'Sandbox'. The analysis is named 'Analysis 1'. A table of ledger entries is displayed with columns for Item No., Sum(Inventory), Sum(Invent. Cost), Sum(Sales Amount), and Sum(Cost Amount). A filter menu is open on the right, showing 'Source Type' with 'Customer' selected. The status bar at the bottom indicates 'Rows: 136 of 344' and 'Total Rows: 344', with a 'Filtered: 136' indicator.

Item No.	Sum(Inventory)	Sum(Invent. Cost)	Sum(Sales Amount)	Sum(Cost Amount)
> 1900-S(4)	3.00	-36.00	6,940.80	-5,410.80
> 1000(1)	3.00	-1.00	0.00	0.00
> 1896-S(7)	13.00	-18.00	18,014.40	-14,052.60
> 1928-S(16)	63.00	-76.00	4,172.40	-3,252.80
> 1920-S(2)	2.00	-7.00	4,534.60	-3,537.80
> 1908-S(12)	6.00	-31.00	5,893.10	-4,591.10
> 1936-S(11)	49.00	-36.00	6,940.80	-5,410.80
> 2000-S(11)	33.00	-19.00	3,611.90	-2,813.90
> 1906-S(7)	15.00	-16.00	6,937.60	-5,411.20
> 1996-S(4)	4.00	-4.00	5,589.20	-4,359.60
> 1968-S(3)	0.00	-19.00	3,611.90	-2,813.90
> 1960-S(8)	35.00	-41.00	7,904.80	-6,162.30
> 1988-S(12)	31.00	-57.00	10,989.60	-8,567.10
> 1964-S(17)	29.00	-34.00	6,555.20	-5,110.20
> 1972-S(3)	1.00	-17.00	3,231.70	-2,517.70
> 1980-S(18)	56.00	-71.00	13,497.10	-10,515.10





# Analysis View – Group By

The screenshot displays the Dynamics 365 Business Central interface for the 'Item Ledger Entries' analysis view. The main table is grouped by 'Item No.', with each group expanded to show individual entries. The table columns include 'Item No.', 'Sum(Inventory)', 'Sum(', 'Sum(Sales Amoun.', and 'Sum(Cost Amount)'. The right-hand side of the interface features a configuration panel with 'Pivot Mode' disabled, a search bar, and sections for 'Analysis Filters' and 'Values'. The 'Row Groups' section is expanded to show 'Item No.' selected. The 'Values' section lists 'Sum(Inventory)', 'Sum(Inventory b...', and 'Sum(Quantity)'. The bottom status bar indicates 'Rows: 344', 'Total Rows: 344', and 'Filtered: 344'.

Item No.	Sum(Inventory)	Sum(	Sum(Sales Amoun.	Sum(Cost Amount)
> 1928-S (31)	186.00	6.00	4,172.40	256.80
> 1003 (2)	23.00	13.00	0.00	975.00
> 1920-S (10)	53.00	12.00	4,534.60	6,064.80
> 1908-S (30)	57.00	3.00	5,893.10	444.30
> 1936-S (28)	863.00	100.00	6,940.80	15,030.00
> 2000-S (21)	210.00	38.00	3,611.90	5,627.80
> 1906-S (14)	44.00	5.00	6,937.60	1,691.00
> 1996-S (9)	28.00	10.00	5,589.20	10,899.00
> 1968-S (14)	44.00	0.00	3,611.90	-0.00
> 1960-S (16)	94.00	2.00	7,904.80	300.60
> 1988-S (24)	120.00	0.00	10,989.60	0.00
> 1964-S (32)	83.00	4.00	6,555.20	601.20
> 1972-S (11)	51.00	0.00	3,231.70	-0.00
> 1980-S (32)	166.00	0.00	13,497.10	0.00
	2,831.00	708.00	108,425.10	121,185.55





# Analysis View - Group By Multi Level

Environment: Sandbox

Item Ledger Entries

Search  Analyse  Analysis 1

Item No. / Document Type	Sum(Inventory)	Sum(	Sum(Sales Amount)	Sum(Cost Amount)
> 1900-S (4)	3.00	-36.00	6,940.80	-5,410.80
> 1000 (1)	3.00	-1.00	0.00	0.00
▼ 1896-S (7)	13.00	-18.00	18,014.40	-14,052.60
> Sales Shipment (1)	5.00	-1.00	1,000.80	-780.70
> Sales Invoice (6)	8.00	-17.00	17,013.60	-13,271.90
Sub Total 1896-S	13.00	-18.00	18,014.40	-14,052.60
> 1928-S (16)	63.00	-76.00	4,172.40	-3,252.80
> 1920-S (2)	2.00	-7.00	4,534.60	-3,537.80
> 1908-S (12)	6.00	-31.00	5,893.10	-4,591.10
> 1936-S (11)	49.00	-36.00	6,940.80	-5,410.80
> 2000-S (11)	33.00	-19.00	3,611.90	-2,813.90
> 1906-S (7)	15.00	-16.00	6,937.60	-5,411.20
> 1996-S (4)	4.00	-4.00	5,589.20	-4,359.60
> 1968-S (3)	0.00	-19.00	3,611.90	-2,813.90
> 1960-S (8)	35.00	-41.00	7,904.80	-6,162.30
> 1988-S (12)	31.00	-57.00	10,989.60	-8,567.10
Rows: 136 of 344	Total Rows: 344		Filtered: 136	

Columns: Analysis Filters

Pivot Mode

Search...

Row Groups

- Item No.
- Document Type

Values

- Sum(Inventory)
- Sum(Inventory b...
- Sum(Quantity)



# Analysis View – Column Totals

Liberty Grove Software - Home x Item Ledger Entries - Analysis 1 x

https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox/?company=Cronus&page=38&dc=0&bookmark=C\_IAAAAACHWAE

Dynamics 365 Business Central Environment: Sandbox

Item Ledger Entries

Search Analyse Analysis 1 +

Item No.	Sum(Inventory)	Sum(	Sum(Sales Amount)	Sum(Cost Amount)
> 1928-S (31)	186.00	6.00	4,172.40	256.80
> 1003 (2)	23.00	13.00	0.00	975.00
> 1920-S (10)	53.00	12.00	4,534.60	6,064.80
> 1908-S (30)	57.00	3.00	5,893.10	444.30
> 1936-S (28)	863.00	100.00	6,940.80	15,030.00
> 2000-S (21)	210.00	38.00	3,611.90	5,627.80
> 1906-S (14)	44.00	5.00	6,937.60	1,691.00
> 1996-S (9)	28.00	10.00	5,589.20	10,899.00
> 1968-S (14)	44.00	0.00	3,611.90	-0.00
> 1960-S (16)	94.00	2.00	7,904.80	300.60
> 1988-S (24)	120.00	0.00	10,989.60	0.00
> 1964-S (32)	83.00	4.00	6,555.20	601.20
> 1972-S (11)	51.00	0.00	3,231.70	-0.00
> 1980-S (32)	166.00	0.00	13,497.10	0.00
	2,831.00	708.00	108,425.10	121,185.55

Rows: 344 Total Rows: 344 Filtered: 344

Pivot Mode

Search...

Columns

Analysis Filters

Row Groups

- Item No.

Values

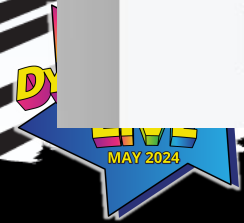
- Sum(Inventory)
- Sum(Inventory b...
- Sum(Quantity)



# Analysis View – Share with Others

The screenshot shows the Dynamics 365 Business Central interface. The browser address bar displays the URL: [https://businesscentral.dynamics.com/f0b7a221-2571-4d50-Q148-1d218d2a8ba/Sandbox/?company=Cronus&page=38&id=0&bookmark=C\\_IAAAAACHWAE](https://businesscentral.dynamics.com/f0b7a221-2571-4d50-Q148-1d218d2a8ba/Sandbox/?company=Cronus&page=38&id=0&bookmark=C_IAAAAACHWAE). The page title is "Item Ledger Entries". A sharing dialog box is open, displaying a green checkmark and the text "Link to 'Analysis 1' copied". The copied link is <https://businesscentral.dynamics.com/f0b7a321>, which is highlighted in a blue box. A "Copy" button is visible next to the link. Below the link, the "Company:" dropdown menu is set to "Link to the current company (Cronus)". A warning message states: "Only recipients with access to this company can use the link." and "Filter values used in the analysis are visible to everyone." The background shows a table of item ledger entries with columns for Item No., Document No., and various monetary values. A search bar and "Analyse" toggle are also visible.

Item No. / Document...	Sum
> 1000 (1)	
> 1896-S (7)	
> 1900-S (4)	
> 1906-S (7)	
> 1908-S (12)	
> 1920-S (2)	2.00 -7.00 4,334.00 -3,337.80
> 1928-S (16)	63.00 -76.00 4,172.40 -3,252.80
> 1936-S (11)	49.00 -36.00 6,940.80 -5,410.80
> 1960-S (8)	35.00 -41.00 7,904.80 -6,162.30
> 1964-S (17)	29.00 -34.00 6,555.20 -5,110.20



Microsoft Excel



# Microsoft Excel

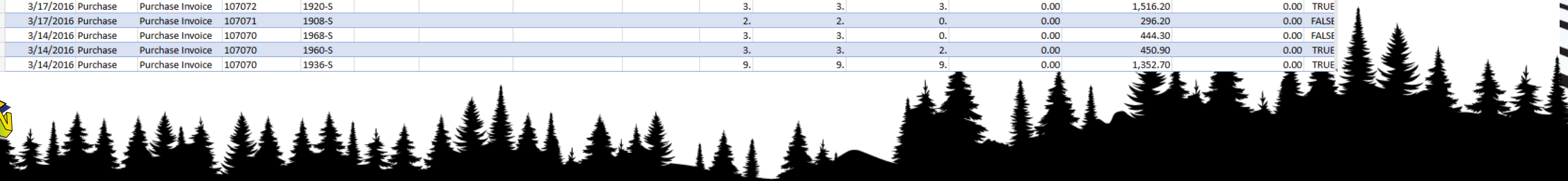
- Large existing skillset
- Loved by Finance people





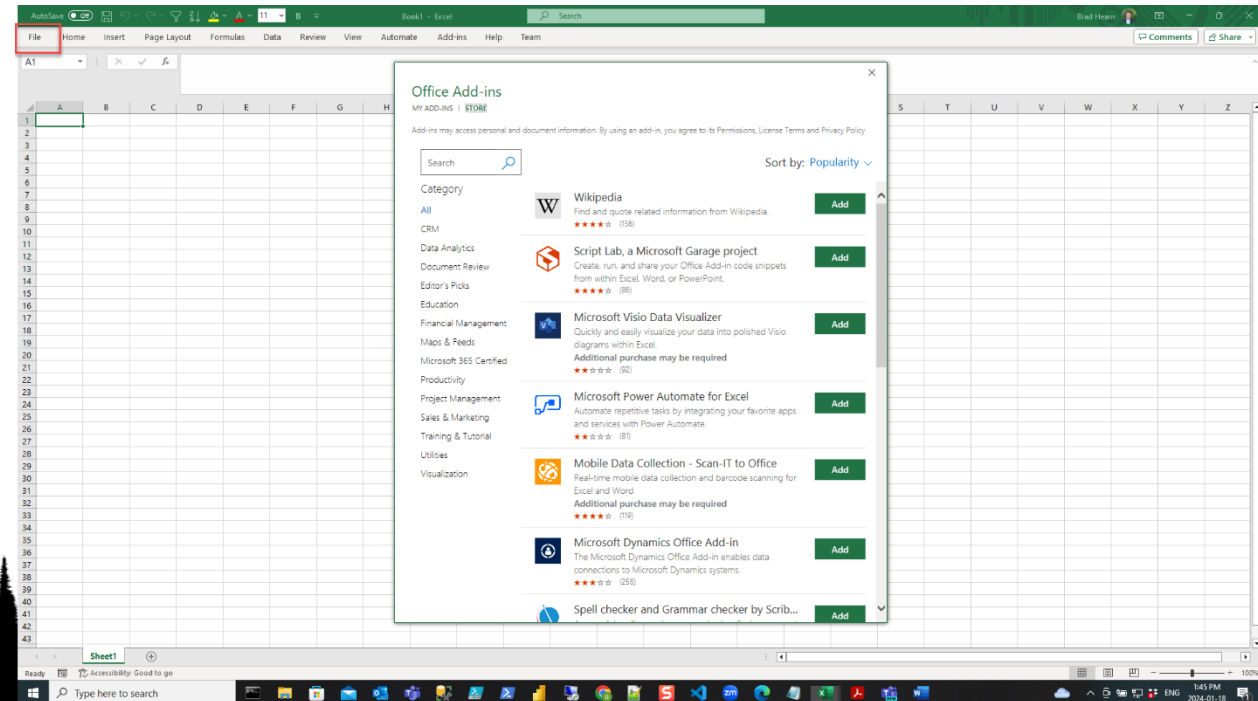
# From BC - List Views - Open in Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
	Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Department Code	Customergroup Code	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invbl)	Open
1	1/19/2024	Sale	Sales Shipment	S-SHPT102005	1936-S					-5.	-5.	0.	964.00	-751.50	0.00	FALSE
2	1/28/2021	Purchase	Purchase Receipt	107002	1000				BLUE	11.	0.	11.	0.00	0.00	0.00	TRUE
3	2/13/2020	Sale	Sales Shipment	S-SHPT102004	1896-S					-1.	-1.	0.	1,000.80	-780.70	0.00	FALSE
4	1/17/2017	Sale	Sales Shipment	S-SHPT102002	1928-S					-1.	-1.	0.	54.90	-42.80	0.00	FALSE
5	1/17/2017	Positive Adjmt.		1003	1003					3.	3.	3.	0.00	225.00	0.00	TRUE
6	1/16/2017	Sale	Sales Shipment	S-SHPT102001	1928-S					-1.	-1.	0.	54.90	-42.80	0.00	FALSE
7	1/6/2017	Positive Adjmt.		1003	1003					10.	10.	10.	0.00	750.00	0.00	TRUE
8	7/7/2016	Positive Adjmt.		1896-S	1896-S					12.	12.	5.	0.00	9,368.40	0.00	TRUE
9	7/6/2016	Positive Adjmt.		1920-S	1920-S					2.	2.	2.	0.00	1,010.80	0.00	TRUE
10	3/31/2016	Sale	Sales Invoice	PS-INV103072	1896-S					-10.	-10.	0.	10,008.00	-7,807.00	0.00	FALSE
11	3/31/2016	Purchase	Purchase Invoice	107081	1908-S					3.	3.	3.	0.00	444.30	0.00	TRUE
12	3/28/2016	Purchase	Purchase Invoice	107080	1928-S					3.	3.	3.	0.00	128.40	0.00	TRUE
13	3/26/2016	Purchase	Purchase Invoice	107079	1936-S					5.	5.	5.	0.00	751.50	0.00	TRUE
14	3/25/2016	Purchase	Purchase Invoice	107078	2000-S					4.	4.	4.	0.00	592.40	0.00	TRUE
15	3/25/2016	Purchase	Purchase Invoice	107078	1908-S					1.	1.	0.	0.00	148.10	0.00	FALSE
16	3/24/2016	Purchase	Purchase Invoice	107077	1906-S					2.	2.	2.	0.00	676.40	0.00	TRUE
17	3/22/2016	Purchase	Purchase Invoice	107076	2000-S					7.	7.	7.	0.00	1,036.70	0.00	TRUE
18	3/22/2016	Purchase	Purchase Invoice	107075	1936-S					4.	4.	4.	0.00	601.20	0.00	TRUE
19	3/22/2016	Purchase	Purchase Invoice	107075	1928-S					8.	8.	3.	0.00	342.40	0.00	TRUE
20	3/18/2016	Purchase	Purchase Invoice	107074	2000-S					5.	5.	5.	0.00	740.50	0.00	TRUE
21	3/18/2016	Purchase	Purchase Invoice	107074	1908-S					2.	2.	0.	0.00	296.20	0.00	FALSE
22	3/17/2016	Purchase	Purchase Invoice	107073	1996-S					3.	3.	3.	0.00	3,269.70	0.00	TRUE
23	3/17/2016	Purchase	Purchase Invoice	107073	1968-S					2.	2.	0.	0.00	296.20	0.00	FALSE
24	3/17/2016	Purchase	Purchase Invoice	107073	1936-S					8.	8.	8.	0.00	1,202.40	0.00	TRUE
25	3/17/2016	Purchase	Purchase Invoice	107073	1936-S					9.	9.	9.	0.00	1,352.70	0.00	TRUE
26	3/17/2016	Purchase	Purchase Invoice	107072	1920-S					3.	3.	3.	0.00	1,516.20	0.00	TRUE
27	3/17/2016	Purchase	Purchase Invoice	107071	1908-S					2.	2.	0.	0.00	296.20	0.00	FALSE
28	3/14/2016	Purchase	Purchase Invoice	107070	1968-S					3.	3.	0.	0.00	444.30	0.00	FALSE
29	3/14/2016	Purchase	Purchase Invoice	107070	1960-S					3.	3.	2.	0.00	450.90	0.00	TRUE
30	3/14/2016	Purchase	Purchase Invoice	107070	1936-S					9.	9.	9.	0.00	1,352.70	0.00	TRUE



# From Excel – BC Plugin

- Open Excel, then open any Excel workbook.
- On the **Insert** menu, choose **Add-ins** > **Get add-ins**
- Go to **Admin managed** and look for **Microsoft Dynamics Office Add-In**. If you see there, select it, then choose **Add**. If you don't see it, go to **Store**, then search for *Microsoft Dynamics Office Add-In* and follow the instruction on screen to add it.



# Excel – BC Plugin

- In the **Microsoft Dynamics** add-in pane in Excel, choose **Add server information**
- For Business Central online, set **Server URL** to `https://exceladdinprovider.smb.dynamics.com`.
- For Business Central on-premises, set it the URL of the web client, like `https://myBCserver/190`.
- Choose **OK**, and then confirm that the app reloads

The screenshot shows the Microsoft Dynamics Office 365 Excel add-in interface. The ribbon at the top includes 'Cells', 'Editing', 'Sensitivity', 'Add-ins', and 'Analyze Data'. The 'Add-ins' pane on the right is open, showing the 'Options' dialog box for the 'App'. The 'Server URL' field is highlighted with a green box and contains the text 'https://exceladdinprovider.smb.dynamics.com'. Other fields include 'Language' (English), 'x-ms-correlation-id' (f47509e8-976c-42dd-8858-34afe2ac156b), 'Search Filter', 'User agent' (ms-dyn-bc-exceladdin), 'Prefer', 'Environment' (Production), and 'Company'. The 'OK' and 'Cancel' buttons are at the bottom right.

# Excel – BC Plugin

- Go to Design
- Select the entity you want to work with

The screenshot displays the Microsoft Excel interface with the Dynamics Office 365 Data Connector plugin. The ribbon at the top includes tabs for General, Styles, Cells, Editing, Sensitivity, Add-ins, and Analyze Data. The Data Connector pane is open on the right side, showing the 'Design' tab. Below the 'Design' tab, there is a dropdown menu for 'Select entity data source' with the following options:

- Acc\_Schedule\_Overview - Acc\_Schedule\_Overview
- Accountant\_Portal\_Activity\_Cues - Accountant\_Portal\_Activity\_Cues
- Accountant\_Portal\_Finance\_Cues - Accountant\_Portal\_Finance\_Cues
- AccountantPortalActivityCues - AccountantPortalActivityCues
- AccountantPortalFinanceCues - AccountantPortalFinanceCues
- AccountantPortalUserTasks - AccountantPortalUserTasks
- Andrew\_Test - Andrew\_Test
- BankAccountLedgerEntries - BankAccountLedgerEntries
- C2Graph - C2Graph
- Cash\_Flow\_Worksheet - Cash\_Flow\_Worksheet
- Cash\_Flow\_WorksheetErrorMessagePart - Cash\_Flow\_WorksheetErrorMessagePart
- Chart\_of\_Accounts - Chart\_of\_Accounts
- Company - Company
- Cust\_LedgerEntries - Cust\_LedgerEntries
- Customer\_Card - Customer\_Card
- Customer\_Card\_Excel - Customer\_Card\_Excel
- Customer\_Ledger\_Entries - Customer\_Ledger\_Entries**
- CustomerBankAccount - CustomerBankAccount
- Demo\_Item - Demo\_Item
- Dimension\_Values - Dimension\_Values

# Excel – BC Plugin

- Choose the fields from the entity

Microsoft Dynamics Office...  
Data Connector Brad Hearn

Design

▶ Entity options

▲ Available fields

Entry\_No - Entry No. . . . .  
Amount\_LCY - Amount (\$) . . . . .  
Credit\_Amount - Credit Amount . . . . .  
Credit\_Amount\_LCY - Credit Amount (\$) . . . . .  
Currency\_Code - Currency Code . . . . .  
Debit\_Amount - Debit Amount . . . . .  
Debit\_Amount\_LCY - Debit Amount (\$) . . . . .  
Dimension\_Set\_ID - Dimension Set ID . . . . .  
Document\_Date - Document Date . . . . .

▲ Selected fields

+ Add Σ Formula X Remove ↑ Up ↓ Down

Customer\_Name - Name . . . . .  
Customer\_No - Customer No. . . . .  
Amount - Amount . . . . .

Previous Done





# Excel - BC Plugin

The screenshot shows the Microsoft Excel interface with the Data connector pane open. The spreadsheet contains the following data:

Name	Customer No.	Amount
Selangorian Ltd.	20000	598.82
Selangorian Ltd.	20000	-598.82
The Cannon Group PLC	10000	174.58
The Cannon Group PLC	10000	-174.58
John Haddock Insurance Co.	30000	1444.07
John Haddock Insurance Co.	30000	-1444.07
Guildford Water Department	50000	950.5
Guildford Water Department	50000	-950.5
Deerfield Graphics Company	40000	2251.92
Deerfield Graphics Company	40000	-2251.92
The Cannon Group PLC	10000	919.23
The Cannon Group PLC	10000	-919.23
Deerfield Graphics Company	40000	412.59
Deerfield Graphics Company	40000	-412.59

The Data Connector pane on the right shows the following configuration:

- Source: Cust\_LedgerEntries
- Field: Name
- Buttons: New, Refresh, Publish, Filter, Design





# **Executive/Management Reports**

# Executives/Management

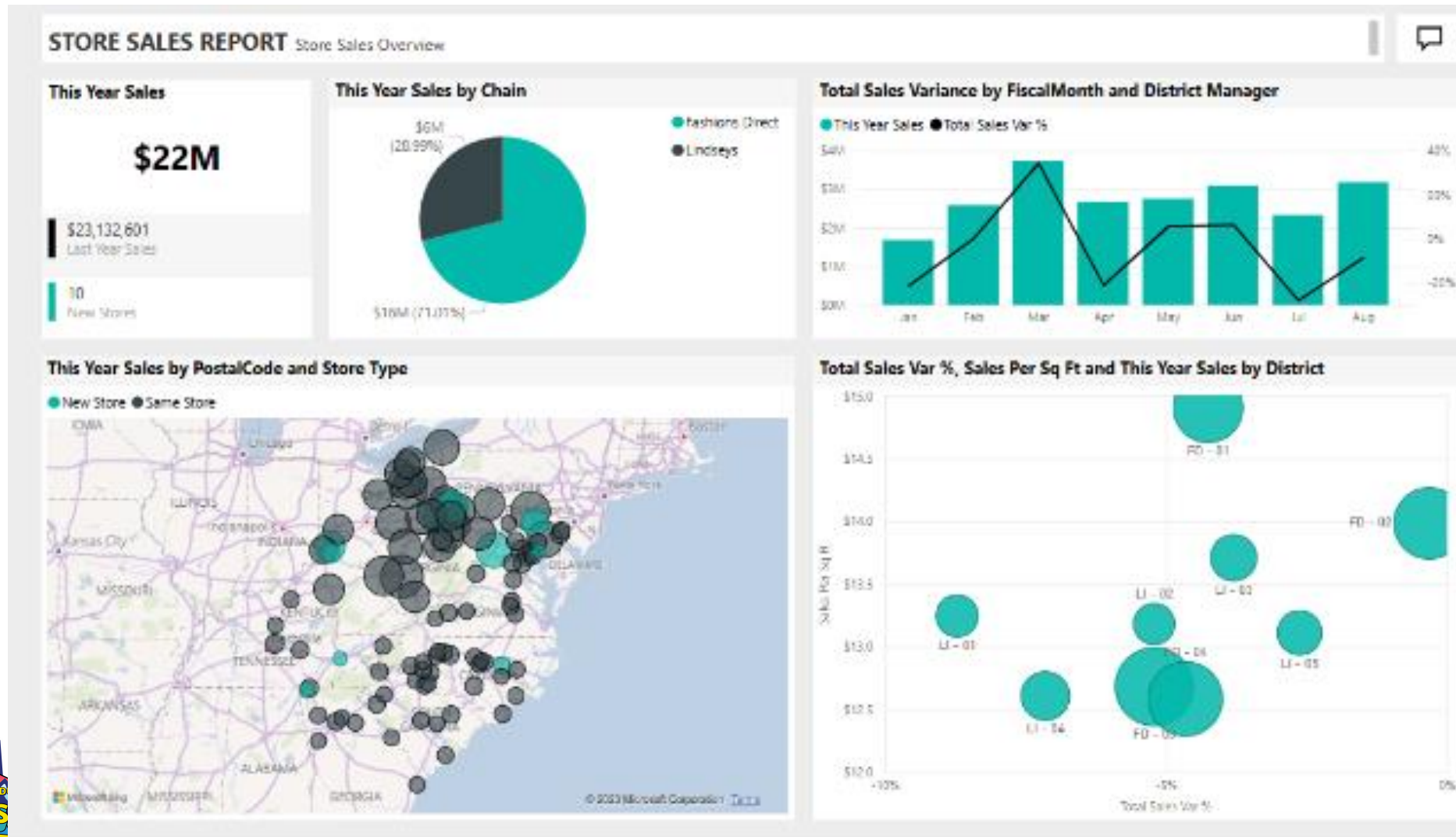
- Information consumers
- Decision makers
- High-level view
- Time restricted
- Not necessarily technically skilled
- Snapshot data usually sufficient



Power BI



# Power BI Dashboards





# Power BI Reports in BC

➤ Can embed Power BI Reports in Business Central

The screenshot displays the Dynamics 365 Business Central interface for user 'Cronus US Brad'. The top navigation bar includes various modules like Finance, Cash Management, Sales, and Purchasing. Below the navigation, there are notification banners and a main content area. The content area is divided into several sections:

- Donut Chart:** A donut chart titled 'All Other Customers' showing the distribution of customers. The segments are: 10000 - The Cannon Group PLC (largest), 40000 - Deerfield Graphics Company, 20000 - Selangorian Ltd., 30000 - John Haddock Insurance Co., and 50000 - Guilford Water Department.
- Table:** A table with columns 'Account No.', 'Name', and 'Balance'. It contains a message: '(There is nothing to show in this view)'. To its right is a summary table with columns 'Description', 'CURRENT PERIOD - 1: 2...', and 'CURRENT PERIOD: 22-0...'. The rows include: Total Revenue, Total Cost, Gross Margin, Gross Margin %, Operating Expenses, Operating Margin, Operating Margin %, Other Expenses, and Income before Interest ...
- Power BI:** A section titled 'Power BI' containing a bar chart and a 'Report Inbox'.
- Bar Chart:** Titled 'Top 5 Items Sold by Quantity CRONUS US'. The x-axis lists items: AMSTERDA... Lamp, BERLIN Guest Chair, yellow, MOSCOW Swivel Chair, red, PARIS Guest Chair, black, ROME Guest Chair, green, and SEOUL Guest Chair, red. The y-axis represents quantity from 0 to 80.
- Report Inbox:** A table with columns 'Description', 'Created Date-Time', and 'Output Type'. It contains a message: '(There is nothing to show in this view)'. Below the report inbox is a 'Back to top' link.



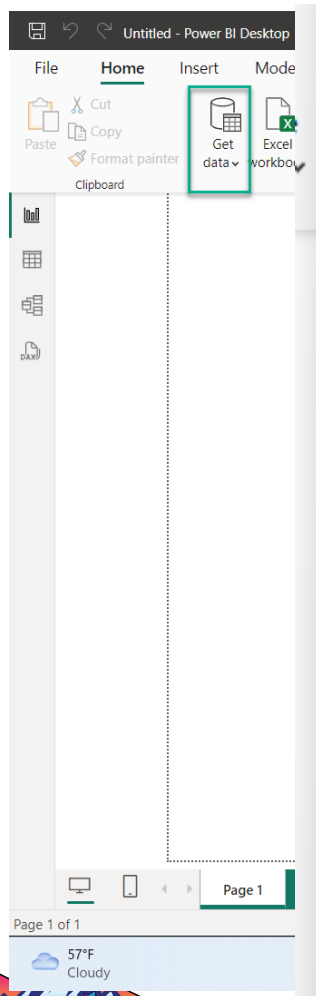
# Steps to Create a Power BI Report to Embed in BC

- Example – Create a Geographical Power BI Report to show where an item is being sold
- Steps
  - Connect Power BI to Business Central
  - Power BI - Get Data – Items and Sales Orders
  - Power Bi - Create Power BI Report with specific settings
  - Power BI – Publish report to the Power BI Service
  - Business Central – Add report from Power BI Service to BC Factbox

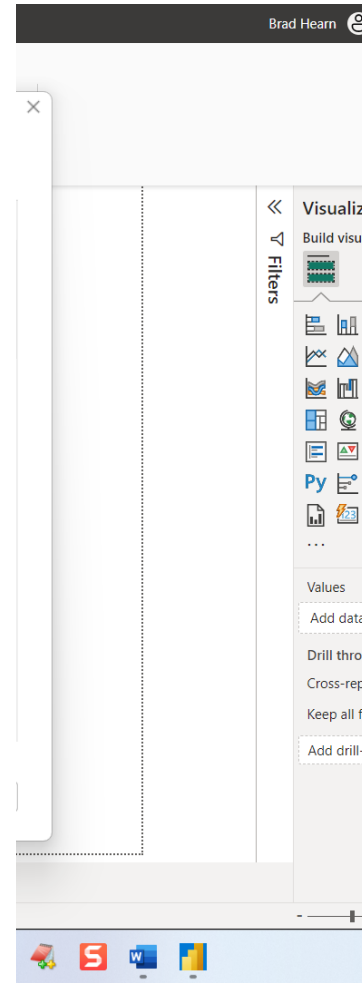
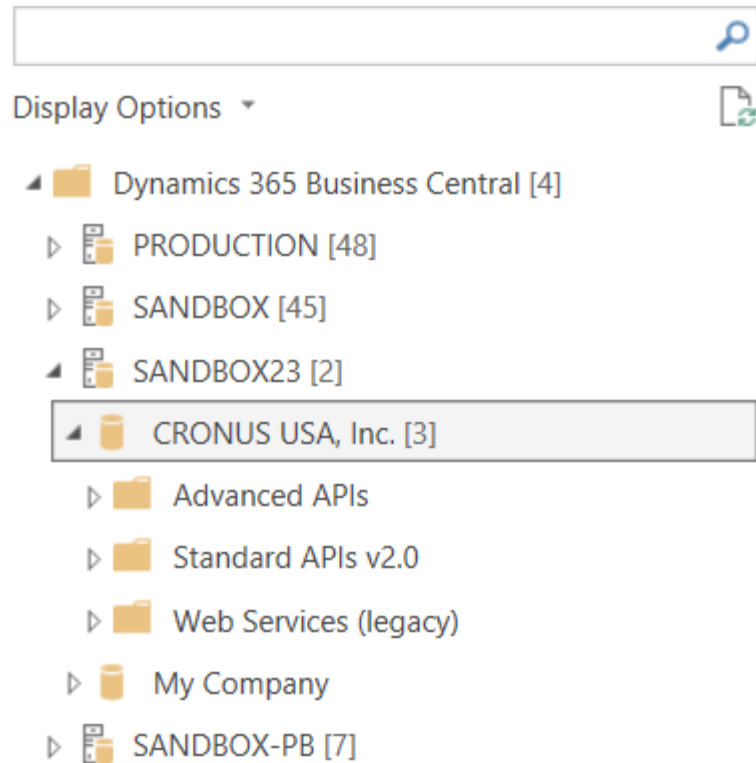
<https://learn.microsoft.com/en-ca/dynamics365/business-central/across-how-use-powerbi-reports-factbox>



# Power BI – Connect to BC

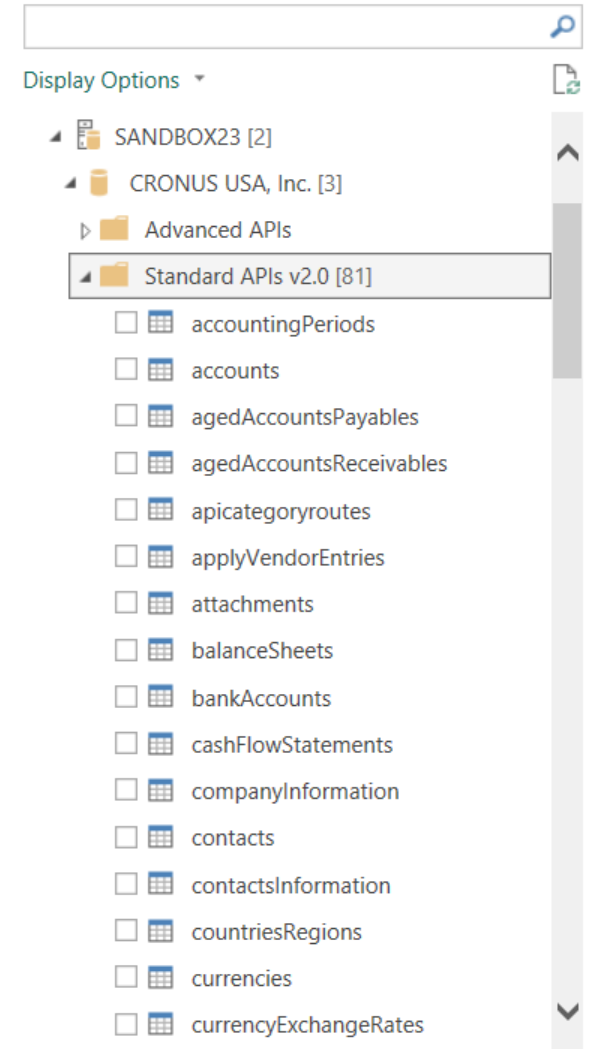


## Navigator



Optimize Help

## Navigator



# Power BI – Select Data

- Get Data
  - Select Items
  - Select Sales Orders, expand to include Sales Order Line and Customers

Optimize Help

## Navigator

Display Options

- SANDBOX23 [2]
- CRONUS USA, Inc. [3]
  - Advanced APIs
    - Standard APIs v2.0 [81]
      - accountingPeriods
      - accounts

Untitled - Power Query Editor

File Home Transform Add Column View Tools Help

Close & Apply New Source Recent Sources Enter Data Data source settings Manage Parameters Refresh Preview Properties Advanced Editor Manage Query Choose Columns Remove Columns Keep Rows Remove Rows Sort Split Column Group By Data Type: Text Use First Row as Headers Merge Queries Append Queries Combine Files Text Analytics Vision Azure Machine Learning

Queries [2]

- items
- salesOrders

= v2.0{[Name="salesOrders",Signature="table"]}[Data]

	customer	dimensionValue	currency	paymentTerm	shipmentMethod	dimensionSetLines	salesOrderLines	attachments
1	Record	Record	Record	Record	Record	Table	Table	Table
2	Record	Record	Record	Record	Record	Table	Table	Table
3	Record	Record	Record	Record	Record	Table	Table	Table
4	Record	Record	Record	Record	Record	Table	Table	Table
5	Record	Record	Record	Record	Record	Table	Table	Table
6	Record	Record	Record	Record	Record	Table	Table	Table
7	Record	Record	Record	Record	Record	Table	Table	Table
8	Record	Record	Record	Record	Record	Table	Table	Table
9	Record	Record	Record	Record	Record	Table	Table	Table
10	Record	Record	Record	Record	Record	Table	Table	Table

# Power BI - Model - Join Items to Sales Order Lines by Item Number

The screenshot shows the Power BI Desktop interface with two tables: 'items' and 'salesOrders'. The 'items' table has columns: baseUnitOfMeasureCode, baseUnitOfMeasureId, blocked, displayName, displayName2, ETag, generalProductPostingGroupCode, generalProductPostingGroupId, gtin, id, inventory, inventoryPostingGroupCode, inventoryPostingGroupId, itemCategoryCode, itemCategoryId, lastModifiedDateTime, number. The 'salesOrders' table has columns: salesOrderLines.discountAmount, salesOrderLines.discountApplied..., salesOrderLines.discountPercent, salesOrderLines.documentId, salesOrderLines.id, salesOrderLines.invoiceDiscount..., salesOrderLines.invoicedQuantity, salesOrderLines.invoiceQuantity, salesOrderLines.itemId, salesOrderLines.itemVariantId, salesOrderLines.lineObjectNumber, salesOrderLines.lineType, salesOrderLines.locationId, salesOrderLines.netAmount, salesOrderLines.netAmountInclu..., salesOrderLines.netTaxAmount, salesOrderLines.quantity. A relationship is being configured between 'items' (id) and 'salesOrders' (salesOrderLines.lineObjectNumber). The relationship is set to 'Many to one (\*:1)' with 'Single' cross filter direction. The 'Make this relationship active' checkbox is checked.

**Edit relationship**

Select tables and columns that are related.

salesOrders

nes.accountId	salesOrderLines.lineType	salesOrderLines.lineObjectNumber	salesOrderLines.description
00-0000-000000000000	Item	1996-S	ATLANTA Whiteboard, base
00-0000-000000000000	Item	1968-S	MEXICO Swivel Chair, black
00-0000-000000000000	Item	1928-S	AMSTERDAM Lamp

items

id	number	displayName	displayName2	type	item
da6ad8e9-0c5c-ee11-8df4-6045bde98c3d	1896-S	ATHENS Desk		Inventory	8dcba1ee-0c5c
db6ad8e9-0c5c-ee11-8df4-6045bde98c3d	1900-S	PARIS Guest Chair, black		Inventory	8ccba1ee-0c5c
dc6ad8e9-0c5c-ee11-8df4-6045bde98c3d	1906-S	ATHENS Mobile Pedestal		Inventory	91cba1ee-0c5c

Cardinality: Many to one (\*:1) Cross filter direction: Single

Make this relationship active  Apply security filter in both directions

Assume referential integrity

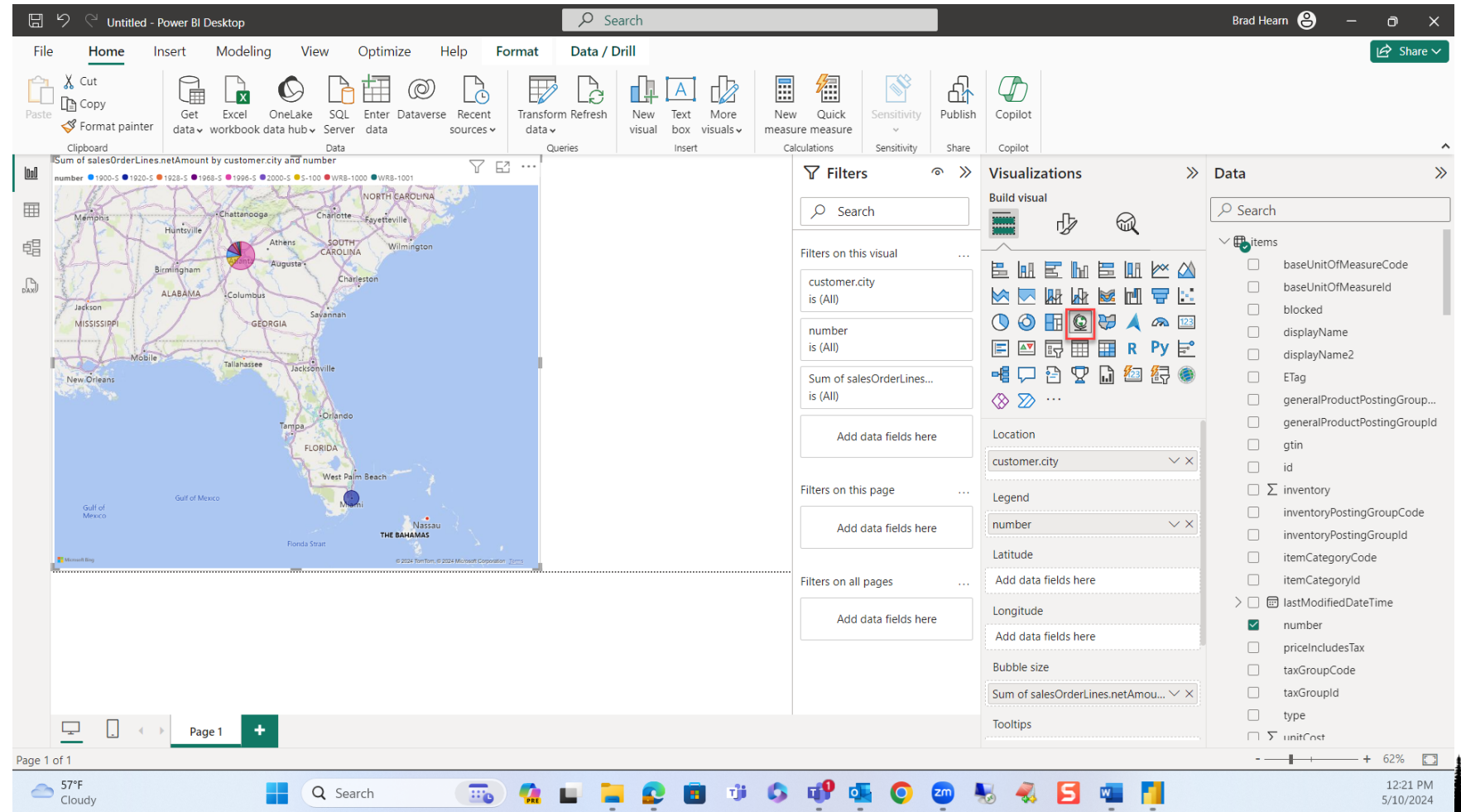
OK Cancel





# Power BI - Create Report

- Create Power BI Geographic Graph with Item Number, Customer City, and Sales Order Quantity



# Power BI – Set Report's Filter

- Set Entity's Primary Key (For Item then it is Item Number) as a filter on all pages in Power BI

The screenshot displays the Power BI Desktop interface. The main visualization is a map of the Southeastern United States, showing the sum of sales order lines by customer city and number. The map is color-coded by city, with a legend at the top. The 'Filters' pane on the right is open, showing 'Filters on this visual' and 'Filters on this page'. The 'Filters on all pages' pane is highlighted with a green box, showing 'number' selected as the filter type. The 'Data' pane on the right shows the 'number' field selected in the 'Items' list.

# Power BI Reports in BC

- Set Report Format (by focusing on background canvas and click paintbrush)
- Set Height 310, Width 325, background white transparent

Sum of salesOrderLines.netAmount by customer number

1900-S 1920-S 1928-S 1968-S 1925-W

Florida Map: Tampa, Orlando, West Palm Beach, Miami

Visualizations pane: Format page, Height 310 px, Width 325 px, Vertical alignment Top, Canvas background Color, Image, Image fit Normal, Transparency 100%

Filters pane: Filters on this page, Filters on all pages, number is (All), Basic filtering

# Power BI – Publish Report to BI Service Workspace

The screenshot displays the 'Publish to Power BI' dialog box in Power BI Desktop. The dialog is titled 'Publish to Power BI' and has a close button (X) in the top right corner. Below the title, it says 'Select a destination'. There is a search bar with the placeholder text 'Search'. A list of destinations is shown below the search bar, with 'LGS Development' highlighted in grey. The other destinations listed are: 'Dynamics 365 Business Central Usage 2023-01-18 10:23:52 a.m.', 'Finance', 'Microsoft Dynamics 365 Business Central - Finance', 'My workspace', and 'Training'. At the bottom of the dialog, there are two buttons: 'Select' (green) and 'Cancel' (white with a grey border). In the background, the Power BI Desktop interface is visible, showing a report with a bar chart titled 'Sum of s number'. The report is on 'Page 1 of 1'. The Windows taskbar at the bottom shows the system tray with the date and time '12:35 PM 5/10/2024' and the weather '58°F Cloudy'. The taskbar also shows various application icons including the Start button, Search, and several open applications like Edge, File Explorer, and Teams.





# Power BI – Power BI in BC Factbox

- Go to page with Item as its primary entity (Items List page for example)
- Power BI in Factbox (you may have to personalize page to expose the Power BI Factbox)

The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Personalizing: Power BI' and a 'Done' button. The main content area displays a list of items with columns for 'No.', 'Description', 'Type', 'Quantity on Hand', and 'Substi... Exist'. A 'Details' panel on the right shows 'Item Details - Invoicing' with fields like 'Item No.', 'Costing Method', and 'Standard Cost'. A red box highlights a 'Power BI' factbox area with a 'Show' button. A message above the factbox reads 'This part is currently hidden' and 'There are no enabled reports'. A 'Clear personalization' button is also visible in the factbox area.

No. ↑	Description	Type	Quantity on Hand	Substi... Exist
1896-S	ATHENS Desk	Inventory	4	No
1900-S	PARIS Guest Chair, black	Inventory	-5	Yes
1906-S	ATHENS Mobile Pedestal	Inventory	5	No
1908-S	LONDON Swivel Chair, blue	Inventory	3	Yes
1920-S	ANTWERP Conference Table	Inventory	10	No
1925-W	Conference Bundle 1-6	Inventory	0	No
1928-S	AMSTERDAM Lamp	Inventory	8	No
1929-W	Conference Bundle 1-8	Inventory	0	No
1936-S	BERLIN Guest Chair, yellow	Inventory	100	No
1953-W	Guest Section 1	Inventory	-49	No
1960-S	ROME Guest Chair, green	Inventory	2	No
1964-S	TOKYO Guest Chair, blue	Inventory	4	No





# Power BI – Select Power BI Report

The screenshot displays the Microsoft Dynamics 365 Business Central interface. At the top, the navigation bar shows 'CRONUS USA, Inc.' and various functional areas like Finance, Cash Management, Sales, Purchasing, and Shopify. Below this, a search bar and a list of items are visible. The 'Items' list includes columns for Item No., Description, Type, Quantity on Hand, and other attributes. The first item, '1896-S ATHENS Desk', is selected. To the right of the list, a 'Power BI' panel is open, showing 'There are no enabled reports.' and a 'Select reports' button. Below this, the 'Item Details - Invoicing' section displays various cost-related data points for the selected item.

No. ↑	Description	Type	Quantity on Hand	Substi... Exist	Assem... BOM	Base Unit of Measure	Cost is Adj...
1896-S	ATHENS Desk	Inventory	4	No	No	PCS	<input checked="" type="checkbox"/>
1900-S	PARIS Guest Chair, black	Inventory	-5	Yes	No	PCS	<input checked="" type="checkbox"/>
1906-S	ATHENS Mobile Pedestal	Inventory	5	No	No	PCS	<input checked="" type="checkbox"/>
1908-S	LONDON Swivel Chair, blue	Inventory	3	Yes	No	PCS	<input checked="" type="checkbox"/>
1920-S	ANTWERP Conference Table	Inventory	10	No	No	PCS	<input checked="" type="checkbox"/>
1925-W	Conference Bundle 1-6	Inventory	0	No	Yes	PCS	<input checked="" type="checkbox"/>
1928-S	AMSTERDAM Lamp	Inventory	8	No	No	PCS	<input checked="" type="checkbox"/>
1929-W	Conference Bundle 1-8	Inventory	0	No	Yes	PCS	<input checked="" type="checkbox"/>
1936-S	BERLIN Guest Chair, yellow	Inventory	100	No	No	PCS	<input checked="" type="checkbox"/>
1953-W	Guest Section 1	Inventory	-49	No	Yes	PCS	<input checked="" type="checkbox"/>
1960-S	ROME Guest Chair, green	Inventory	2	No	No	PCS	<input checked="" type="checkbox"/>
1964-S	TOKYO Guest Chair, blue	Inventory	4	No	No	PCS	<input checked="" type="checkbox"/>
1965-W	Conference Bundle 2-8	Inventory	-81	No	Yes	PCS	<input checked="" type="checkbox"/>
1968-S	MEXICO Swivel Chair, black	Inventory	10	Yes	No	PCS	<input checked="" type="checkbox"/>

**Power BI**

There are no enabled reports.

[Select reports](#)

**Item Details - Invoicing**

Item No.	1896-S
Costing Method	FIFO
Cost is Adjusted	Yes
Cost is Posted to G/L	Yes
Standard Cost	780.70
Unit Cost	780.70
Overhead Rate	0.00
Indirect Cost %	0
Last Direct Cost	780.70



# Power BI Reports in BC

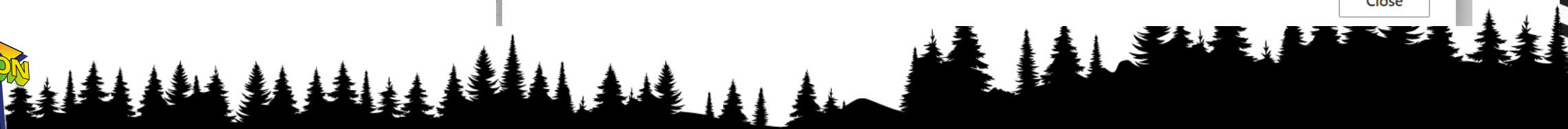
- The Power BI Service Workspaces will appear.
- Select the report you just published to the Power BI Service .

Power BI Reports Selection

Search Edit List Enable Disable Default Reports Get Reports

Name	Enabled
<b>Finance</b>	<input type="checkbox"/>
CustomerMap	<input type="checkbox"/>
Sales	<input type="checkbox"/>
<b>LGS Development</b>	<input type="checkbox"/>
<b>DynamicsConLive</b>	<input type="checkbox"/>
Order Summary Drill through 3	<input type="checkbox"/>
<b>Microsoft Dynamics 365 Business Central - Finance</b>	<input type="checkbox"/>
Microsoft Dynamics 365 Business Central - Finance	<input type="checkbox"/>
<b>Dynamics 365 Business Central Usage 2023-01-18 10:23:52 a.m.</b>	<input type="checkbox"/>
Administration	<input type="checkbox"/>
Errors	<input type="checkbox"/>
Performance	<input type="checkbox"/>
Usage	<input type="checkbox"/>

Close



# Power BI Report in BC Factbox

Liberty Grove Software - Home | Items

https://businesscentral.dynamics.com/f0b7a321-2571-4d59-9148-1d3484d2a8be/Sandbox23/?company=CRONUS%20USA%2C%20Inc.&node=0000233e-fd3e...

Dynamics 365 Business Central | Environment: Sandbox23

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Shopify | All Reports

Items: All | Search | Analyse | New | Delete | Home | Item | Prices & Discounts | Attributes | Report | More options

You can get the sales forecast updated automatically every week. Set Up Scheduled Forecasting | Don't ask again

No. ↑	Description	Type	Quantity on Hand	Substi... Exist	Assem... BOM	Base Unit of Measure	Cost is Adj...	Ur
SP-BOM2002	Heating element	Inventory	0	No	No	PCS	☑	
SP-BOM2003	Water tubing	Inventory	0	No	No	PCS	☑	
SP-BOM2004	Reservoir testing kit	Inventory	0	No	No	PCS	☑	
SP-BOM3001	Paint, black	Inventory	0	No	No	CAN	☑	
SP-BOM3002	Paint, red	Inventory	0	No	No	CAN	☑	
SP-BOM3003	Paint, white	Inventory	0	No	No	CAN	☑	
SP-SCM1004	AutoDrip	Inventory	0	No	No	PCS	☑	
SP-SCM1006	AutoDripLite	Inventory	0	No	No	PCS	☑	
SP-SCM1008	Airpot lite	Inventory	0	No	No	PCS	☑	
SP-SCM1009	Airpot	Inventory	0	No	No	PCS	☑	
SP-SCM1011	Airpot Duo	Inventory	0	No	No	PCS	☑	
<b>WRB-1000</b>	<b>Whole Roasted Beans, Colombia</b>	Inventory	0	No	No	<b>PCS</b>	☑	
WRB-1001	Whole Roasted Beans, Brazil	Inventory	0	No	No	PCS	☑	
WRB-1002	Whole Roasted Beans, Indonesia	Inventory	0	No	No	PCS	☑	

Details | Attachments (0)

Power BI

Sum of salesOrderLines.netAmount by cus

number ● WRB-1000

Item Details - Invoicing





# Scheduled Reports

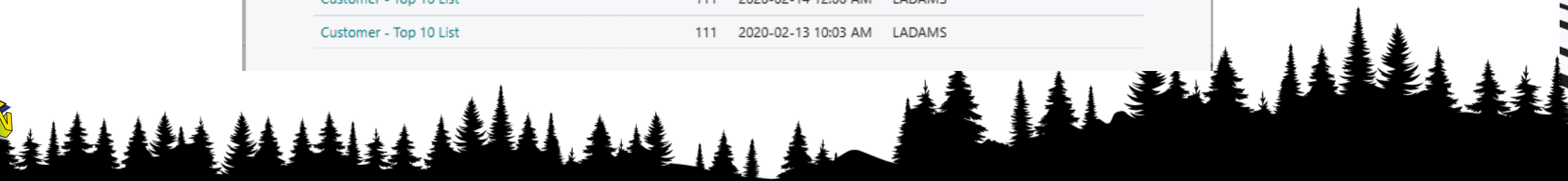
# Scheduled Reports – Report Inbox

➤ Pre-run Reports delivered to Report Inbox

Report Inbox

Search [toggle] Analyse Open in OneDrive Share Download More options

Report Name	Report ID	Created Date-Time ↓	User ID ↓
<a href="#">Customer - Top 10 List</a>	111	2020-02-24 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-23 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-22 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-21 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-20 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-19 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-18 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-17 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-16 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-15 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-14 12:00 AM	LADAMS
<a href="#">Customer - Top 10 List</a>	111	2020-02-13 10:03 AM	LADAMS







# **In Summary**

# Business Central Report

Strategies to get to the **right report**:

1. Understand the Business Drivers
2. Know your User
3. Identify the Right Report



# Business Central Report

Make sure your report has:

1. The right information
2. At the right time
3. In the right format
4. Using the right delivery method



# Questions

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**<https://libertygrove.com>**

**<https://aka.ms/bcReporting>**



**Thank You**

