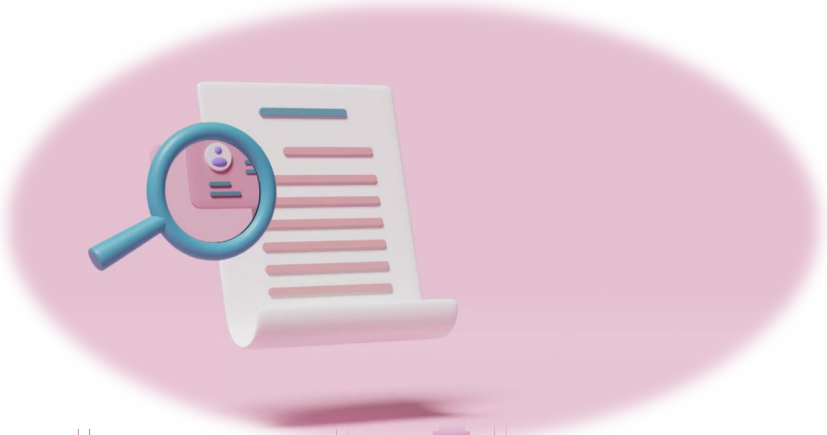
2025 DYNAMICS CON

dynamicscon.com

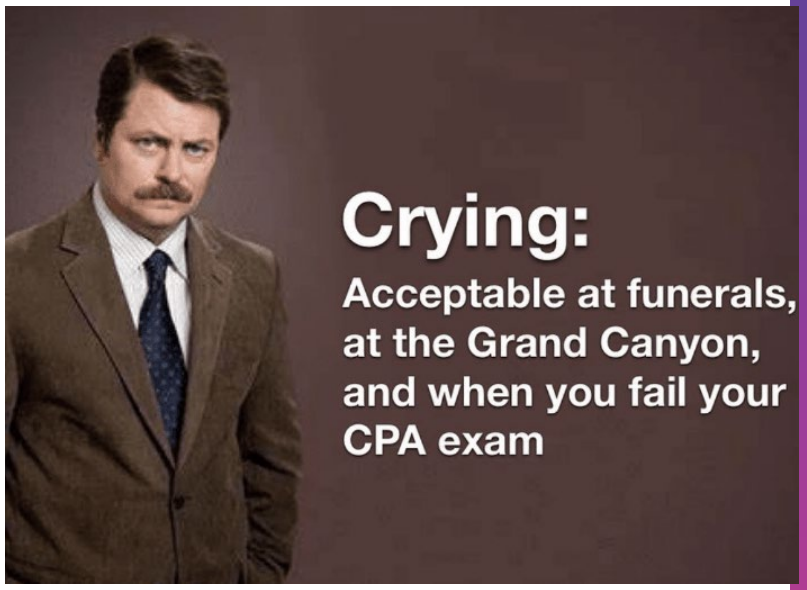
Reporting Navigator:

Choosing the Right BC Reporting Tool for Every Need



2025 DYNAMICS CON

LinkedIn



Cari Corozza

Controller &
Trainer/Consultant

New View Strategies

2025 DYNAMICS CON

Objectives

Review types of reports available within and for BC

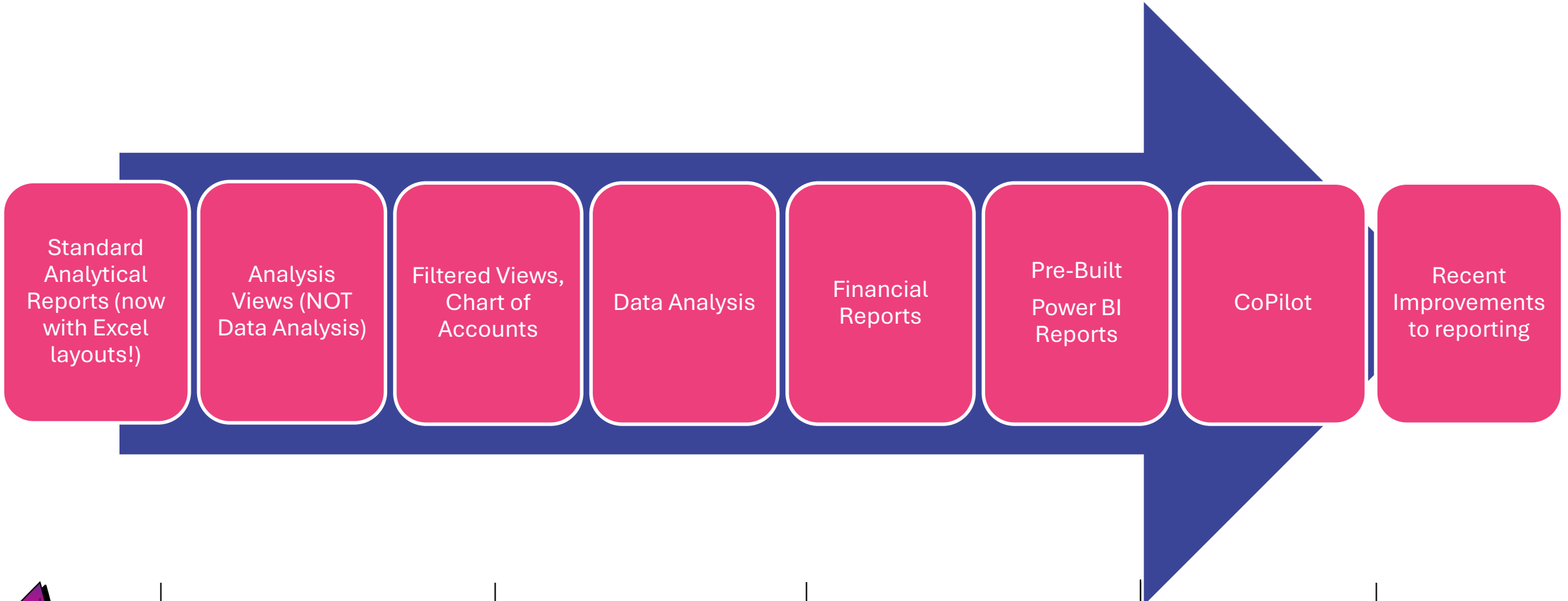
How to find the reports

Show different reporting options and use cases

NOT instructional or step-by-step

Share Microsoft improvements to reporting

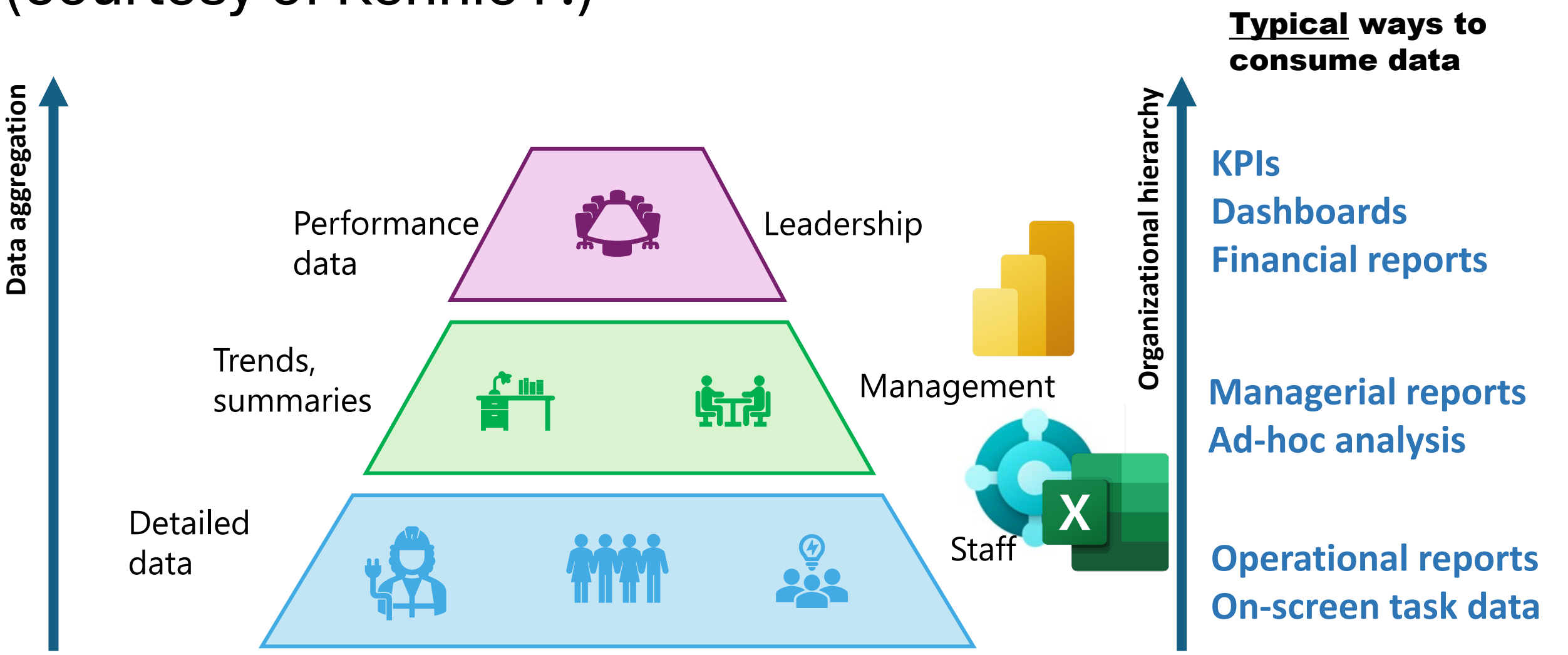
Reporting in Business Central



2025 DYNAMICS CON

Who is using the report?

Typical *analytics* needs in organizations (courtesy of Kennie P.)



Source: aka.ms/bcFinanceAnalytics

Standard Analytical Business Central reports

Standard Analytical Business Central reports – What are they?

Vendor Purchases by Item

Thursday, April 24, 2025 4:34 PM

All Purchases to Date

Page 1

CRONUS International Ltd.

CARI

Item: Date Filter: 01/01/21..12/31/26

Returns are not included in Purchase Quantities.

Items with Net Purchases of more than $100

Vendor No.	Name	Invoiced Quantity	Amount Before Discount	Discount Amount	Amount	Net Average
1896-S	**ATHENS Desk**	**Base Unit of Measure: PCS**				
20000	First Up Consultants	4.00	3,122.80	0.00	3,122.80	780.70
50000	Nod Publishers	180.00	140,526.00	0.00	140,526.00	780.70
Total for Item No.: 1896-S		**184.00**	**143,648.80**	**0.00**	**143,648.80**	**780.70**
1900-S	**PARIS Guest Chair, black**	**Base Unit of Measure: PCS**				
50000	Nod Publishers	120.00	18,036.00	0.00	18,036.00	150.30
Total for Item No.: 1900-S		**120.00**	**18,036.00**	**0.00**	**18,036.00**	**150.30**
1906-S	**ATHENS Mobile Pedestal**	**Base Unit of Measure: PCS**				
30000	Graphic Design Institute	109.00	36,863.80	0.00	36,863.80	338.20
Total for Item No.: 1906-S		**109.00**	**36,863.80**	**0.00**	**36,863.80**	**338.20**
1908-S	**LONDON Swivel Chair, blue**	**Base Unit of Measure: PCS**				
20000	First Up Consultants	75.00	11,107.50	0.00	11,107.50	148.10
50000	Nod Publishers	3.00	444.30	0.00	444.30	148.10
Total for Item No.: 1908-S		**78.00**	**11,551.80**	**0.00**	**11,551.80**	**148.10**
1920-S	**ANTWERP Conference Table**	**Base Unit of Measure: PCS**				
40000	Wide World Importers	87.00	43,969.80	0.00	43,969.80	505.40
Total for Item No.: 1920-S		**87.00**	**43,969.80**	**0.00**	**43,969.80**	**505.40**

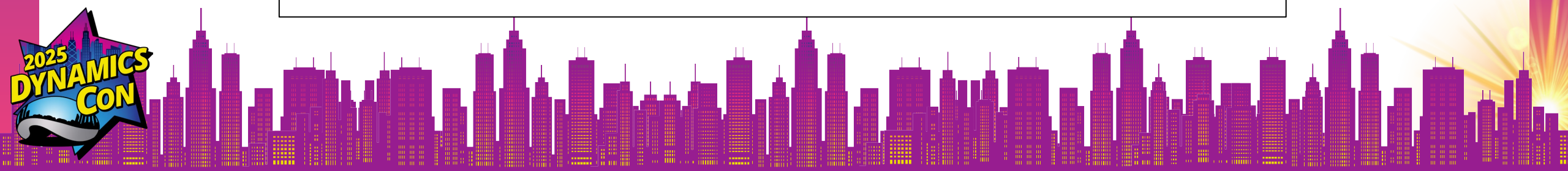
Standard Analytical Business Central reports – What are they?

Customer - Order Summary

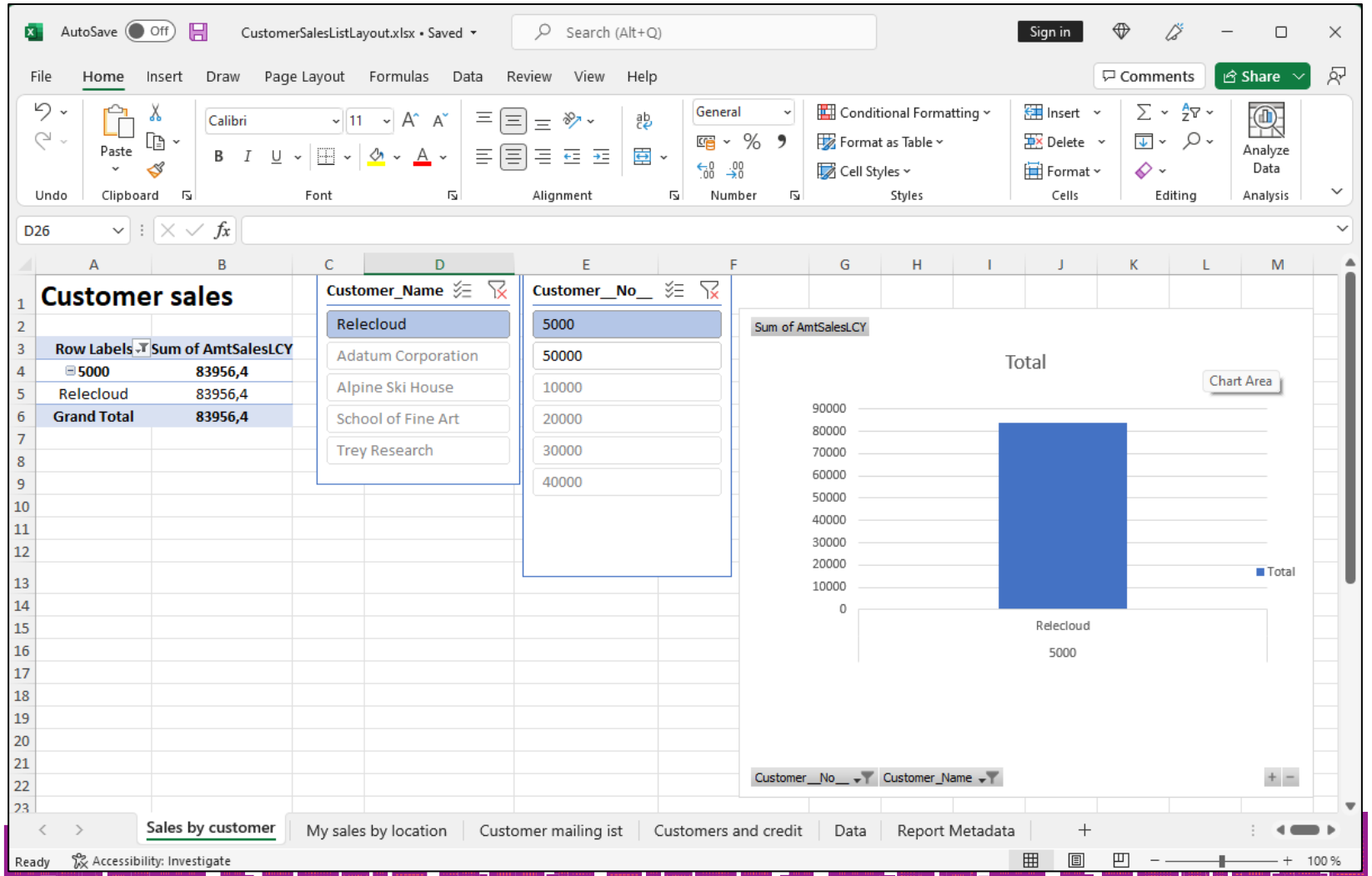
Thursday, April 24, 2025
Page 1 / 1
CARI

CRONUS USA, Inc.
Outstanding Orders

Customer No.	Name	...before	06/04/25 07/03/25	07/04/25 08/03/25	08/04/25 09/03/25	after...	Total
10000	Adatum Corporation	22,712.90	3,002.40	0.00	0.00	0.00	25,715.30
20000	Trey Research	0.00	4,003.20	0.00	0.00	0.00	4,003.20
30000	School of Fine Art	5,182.40	0.00	0.00	0.00	0.00	5,182.40
40000	Alpine Ski House	570.30	5,004.00	0.00	0.00	0.00	5,574.30
C00010	Cari's Cakes	0.00	2,575.80	0.00	0.00	0.00	2,575.80
Total ($)		**28,465.60**	**14,585.40**	**0.00**	**0.00**	**0.00**	**43,051.00**

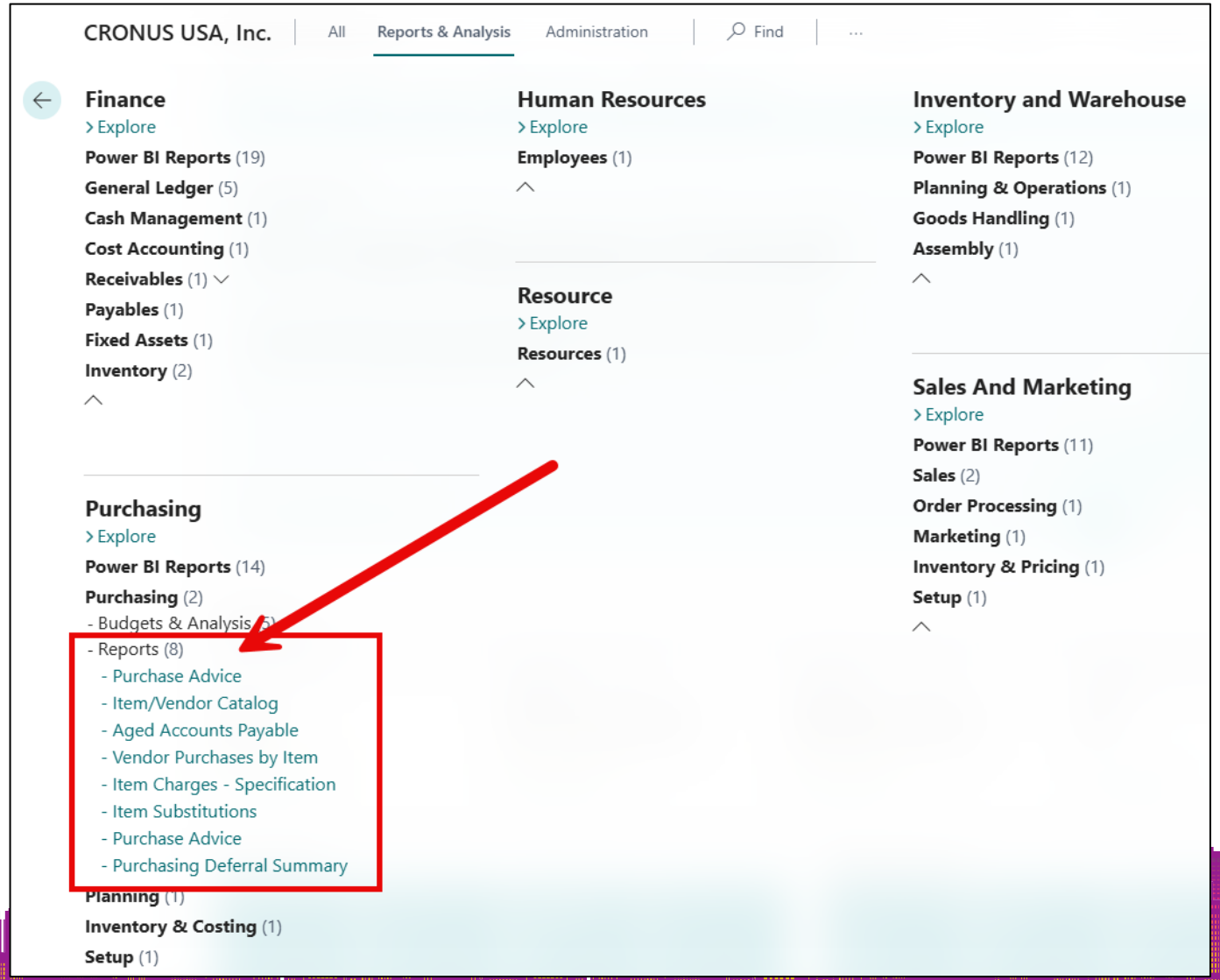


Standard Analytical Business Central reports – What are they?

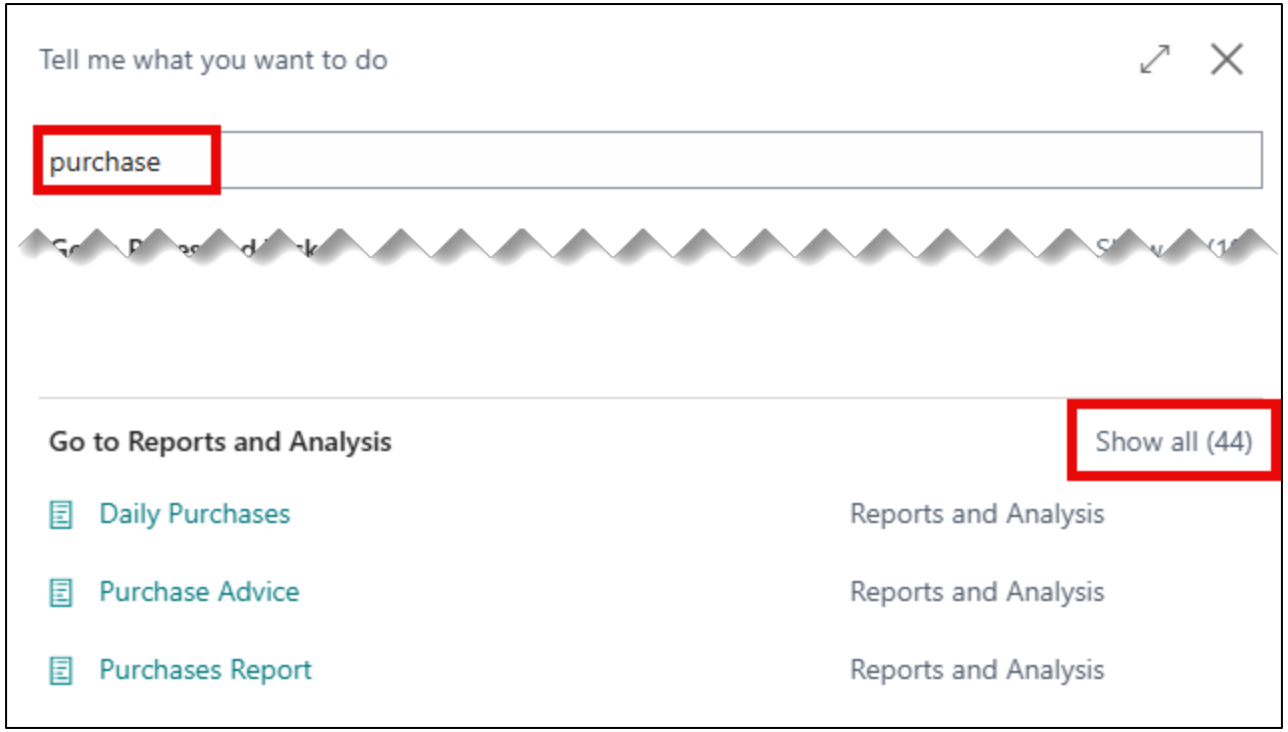


https://learn.microsoft.com/en-us/dynamics365/business-central/ui-excel-report-layouts?tabs=any-report

Standard Analytical Business Central reports – How do I find them?



Standard Analytical Business Central reports – How do I find them?



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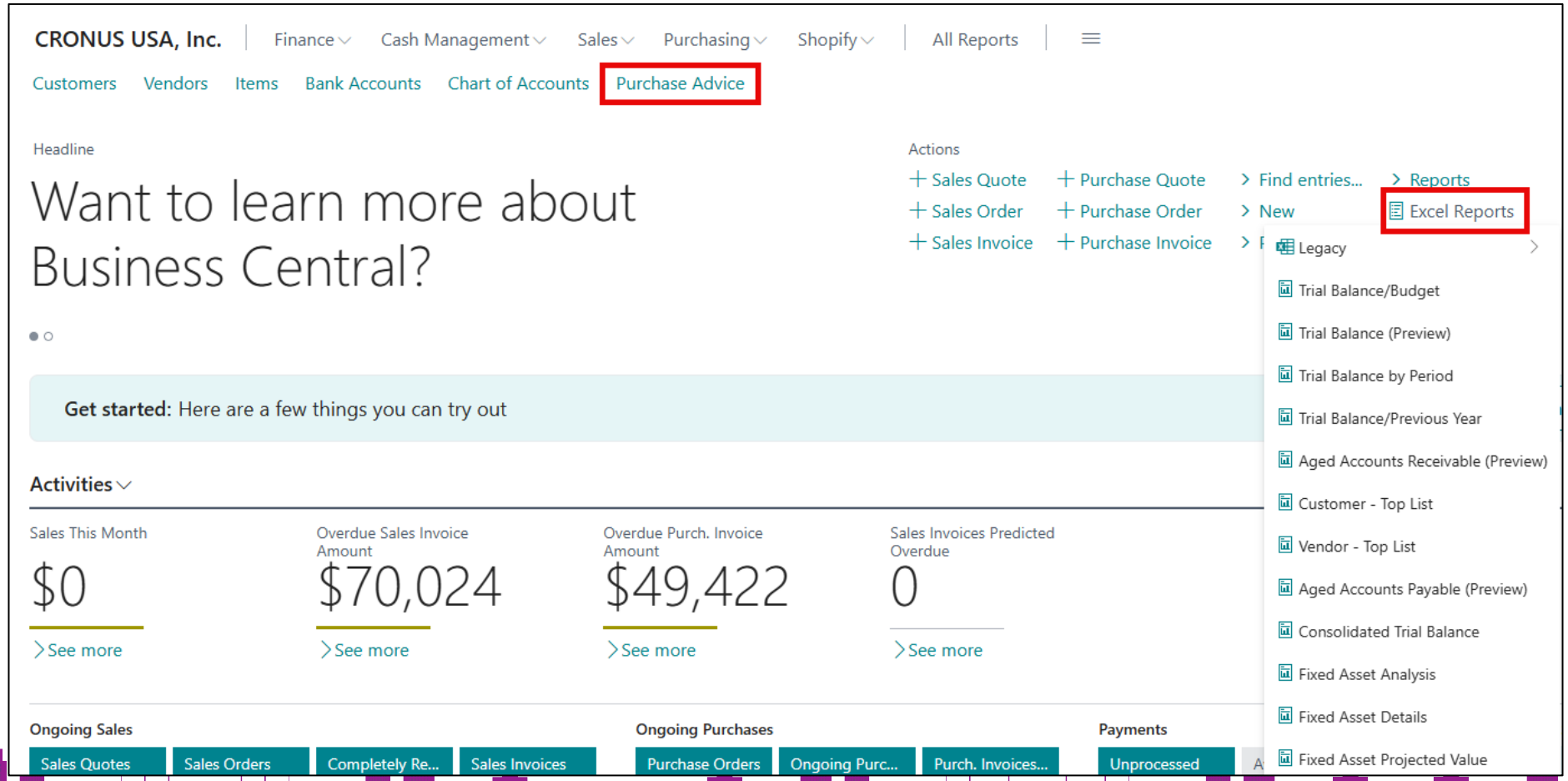
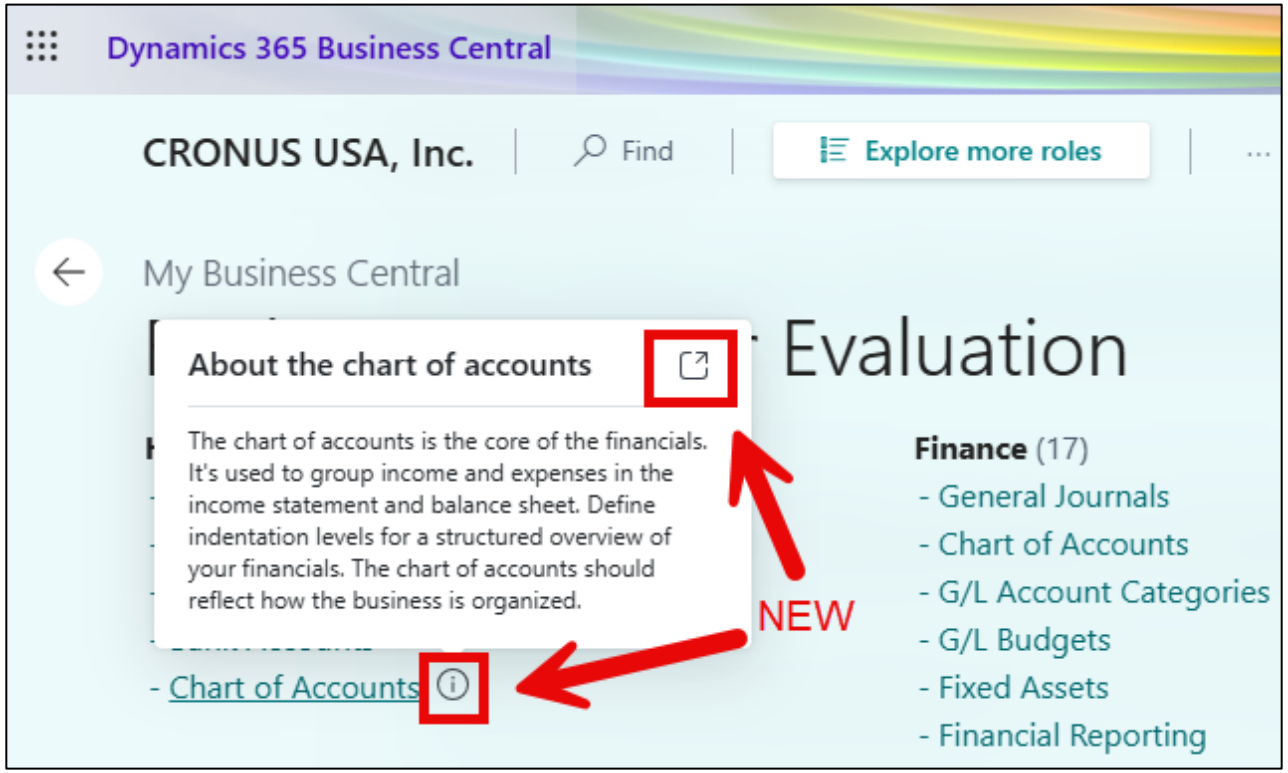
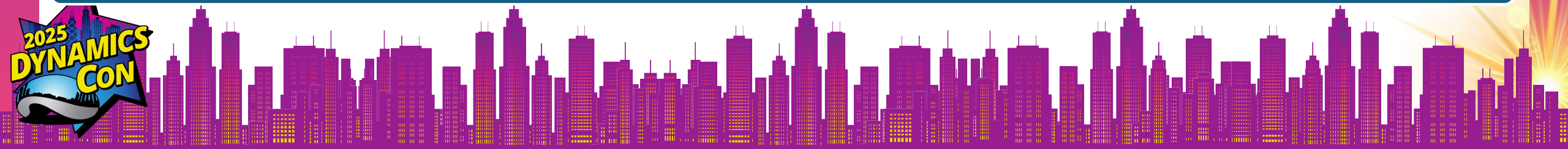


Improvement to Role Explorer

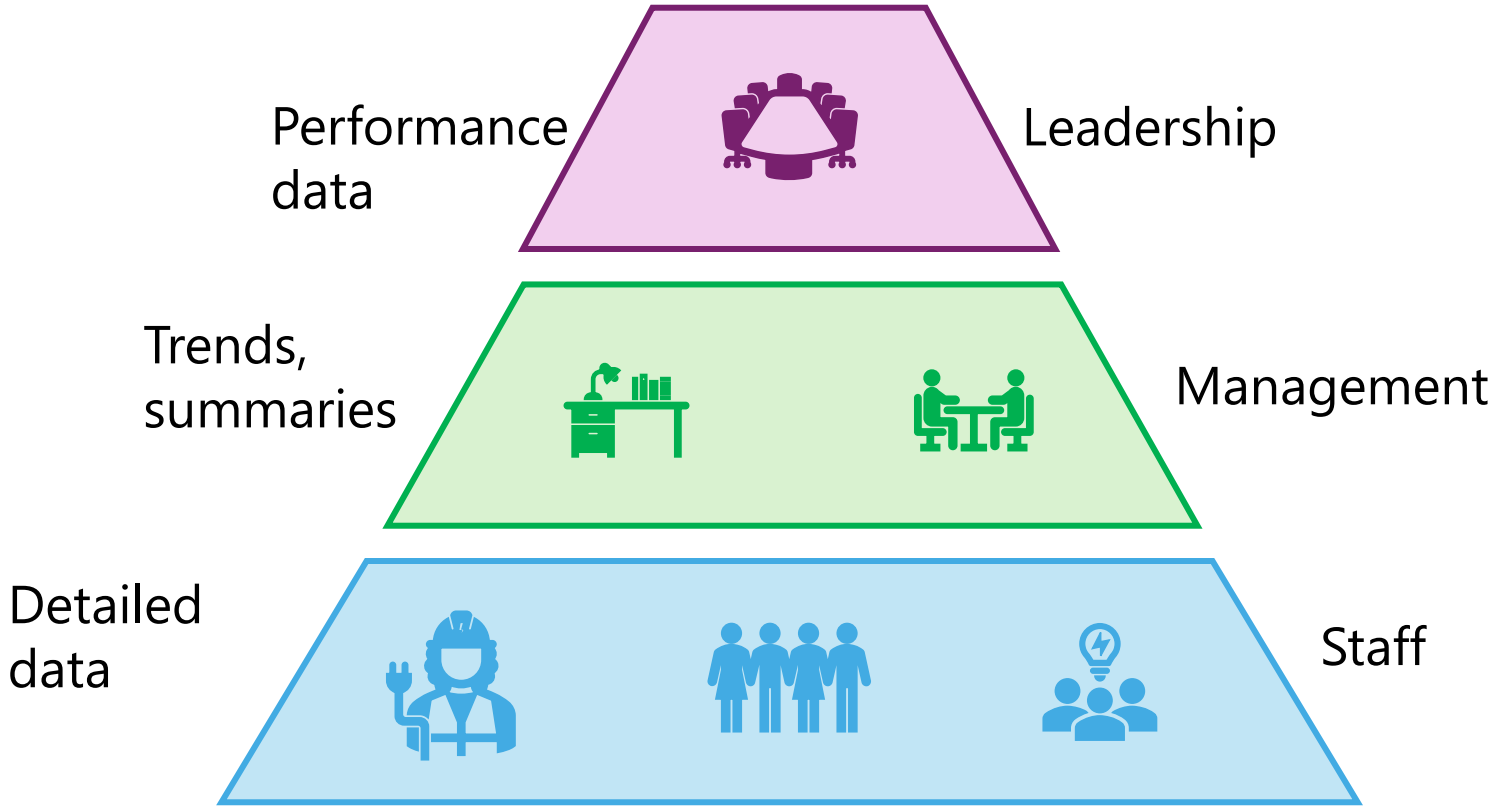


Standard Analytical Business Central reports – When should I use them?

- Report fits your needs with minimal manipulation
- Assist with month-end reconciliations, especially subledgers
- Minimal or no custom fields
- We want data without building custom reports
- You can modify Excel layout to fit your needs
- If someone asks, “Do we have a report that shows XYZ?”
- Typically, not used as “financial reports”
- ****Even I couldn’t name all the analytical reports in BC and what they show****



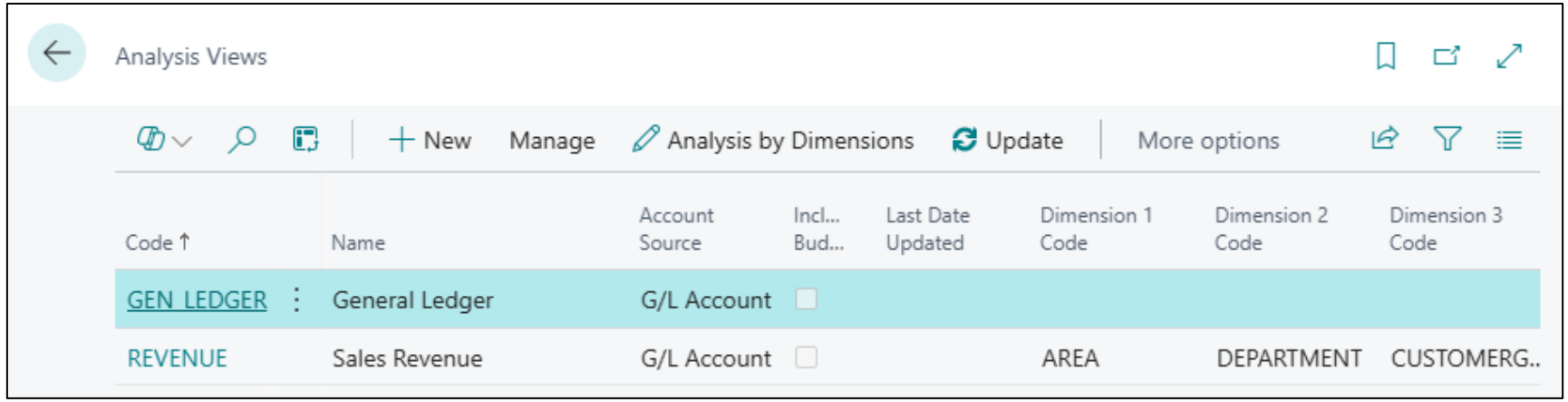
Target Audience

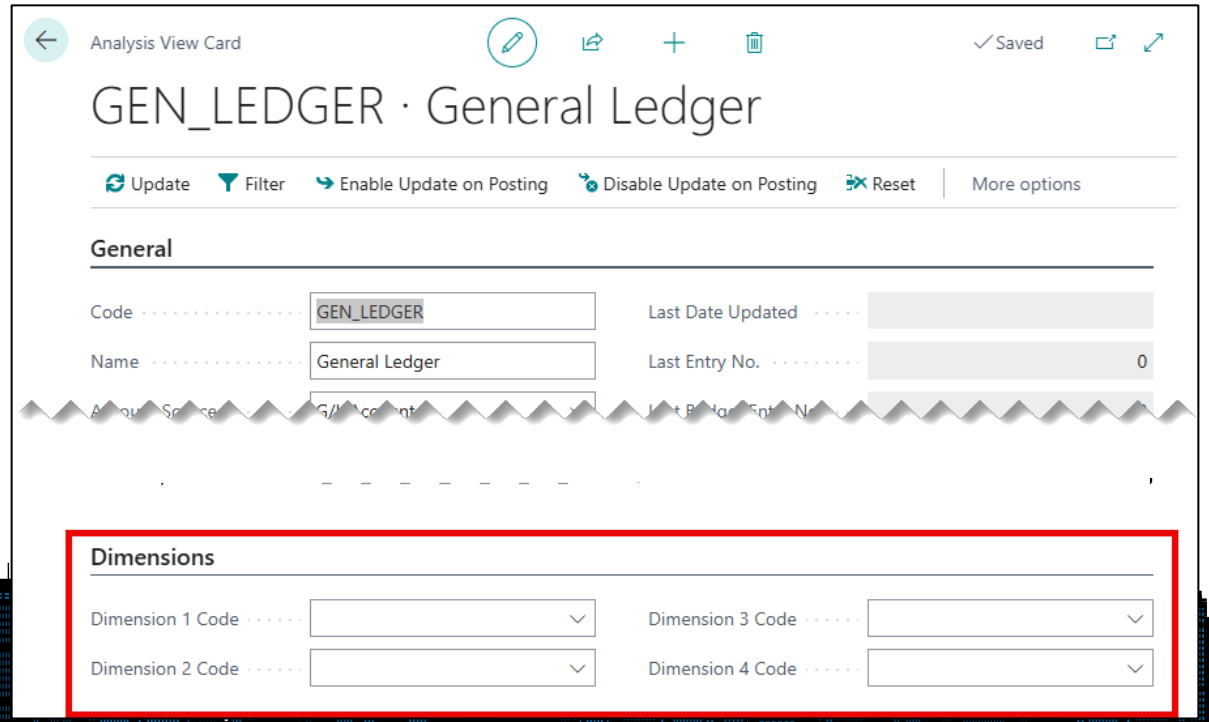


Analysis Views

not to be confused with Data Analysis

Analysis Views – What are they?





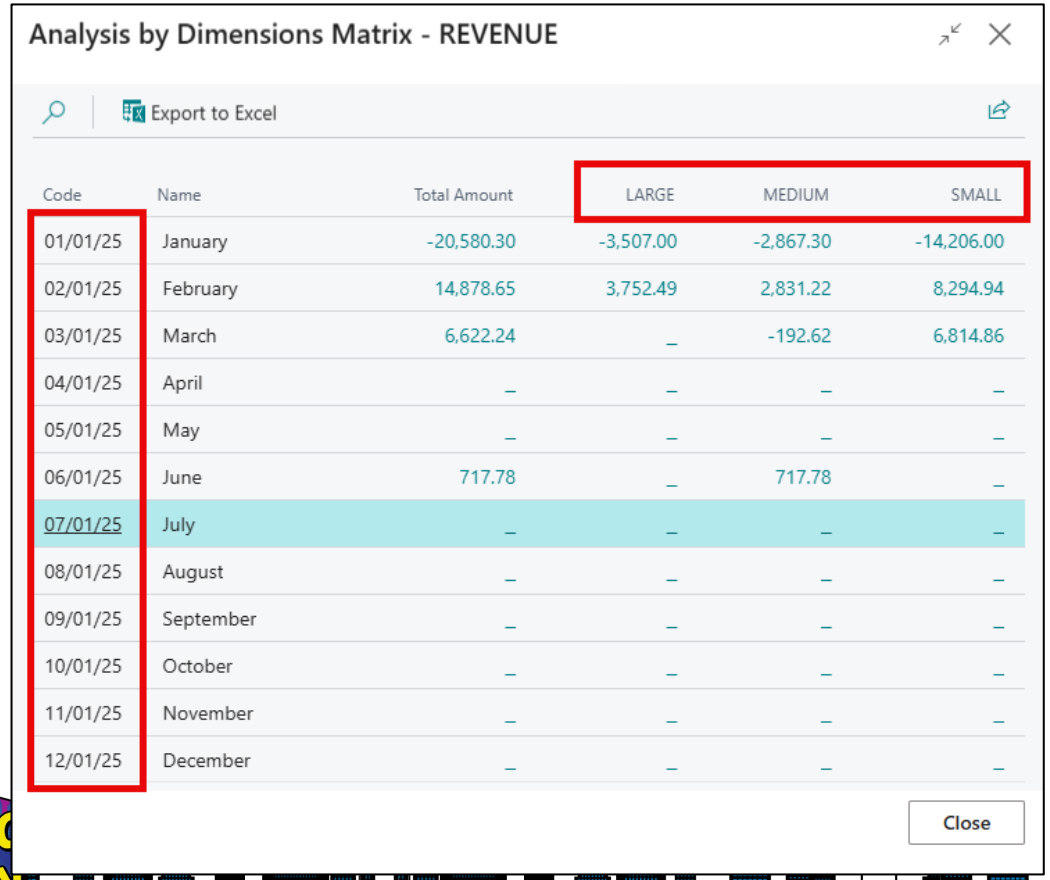
Analysis Views – How do I find them?

SYSTEM SEARCH

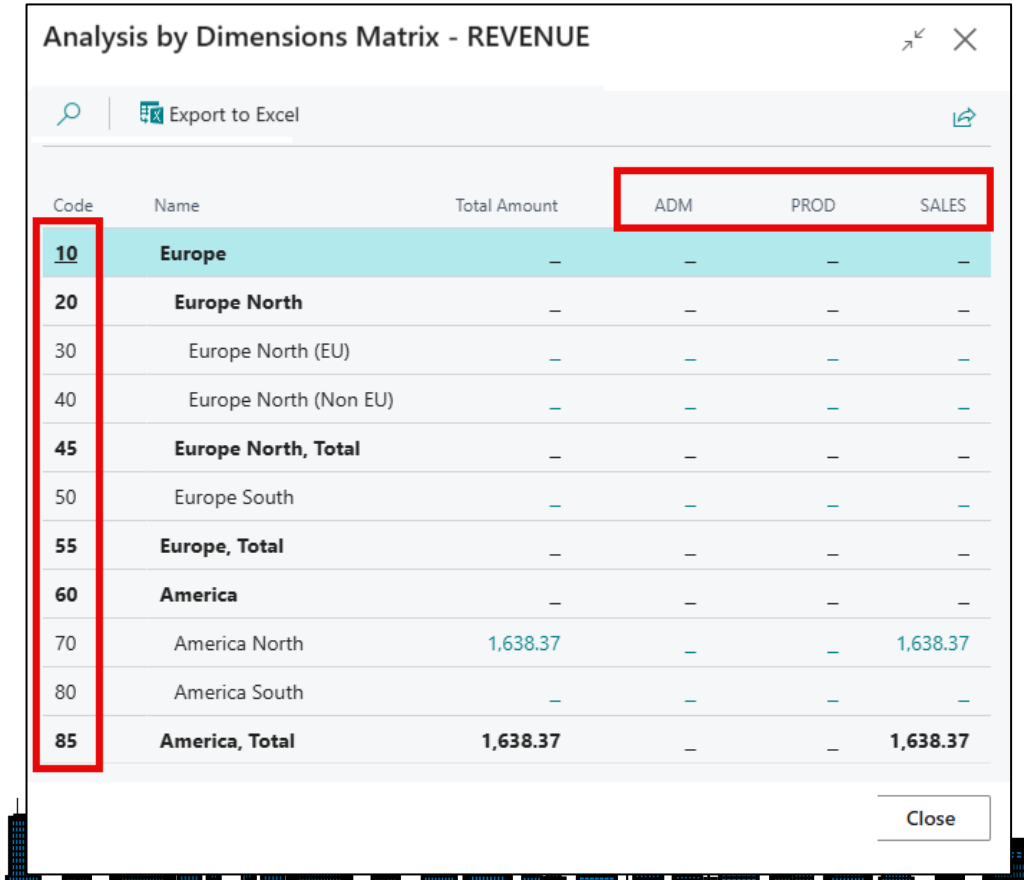
BOOKMARK

Analysis Views – When should I use them?

On their own for data analysis



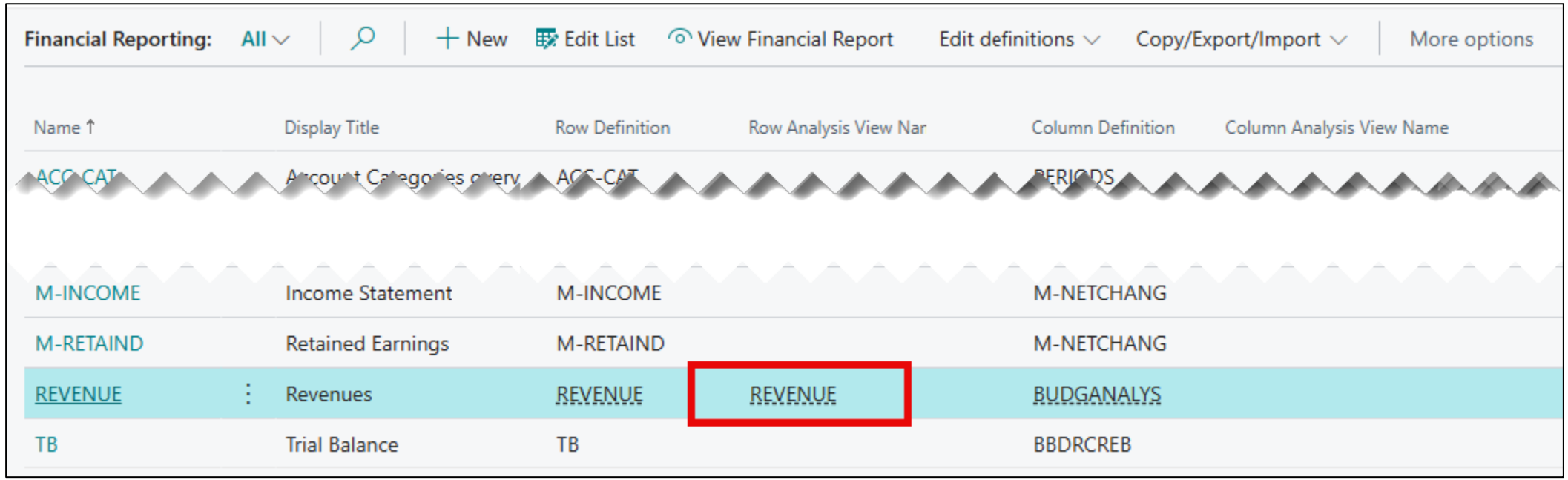
Code	Name	Total Amount	LARGE	MEDIUM	SMALL
01/01/25	January	-20,580.30	-3,507.00	-2,867.30	-14,206.00
02/01/25	February	14,878.65	3,752.49	2,831.22	8,294.94
03/01/25	March	6,622.24	_	-192.62	6,814.86
04/01/25	April	_	_	_	_
05/01/25	May	_	_	_	_
06/01/25	June	717.78	_	717.78	_
07/01/25	July	_	_	_	_
08/01/25	August	_	_	_	_
09/01/25	September	_	_	_	_
10/01/25	October	_	_	_	_
11/01/25	November	_	_	_	_
12/01/25	December	_	_	_	_



Code	Name	Total Amount	ADM	PROD	SALES
10	**Europe**	_	_	_	_
20	**Europe North**	_	_	_	_
30	Europe North (EU)	_	_	_	_
40	Europe North (Non EU)	_	_	_	_
45	**Europe North, Total**	_	_	_	_
50	Europe South	_	_	_	_
55	**Europe, Total**	_	_	_	_
60	**America**	_	_	_	_
70	America North	1,638.37	_	_	1,638.37
80	America South	_	_	_	_
85	**America, Total**	1,638.37	_	_	1,638.37

Analysis Views – When should I use them?

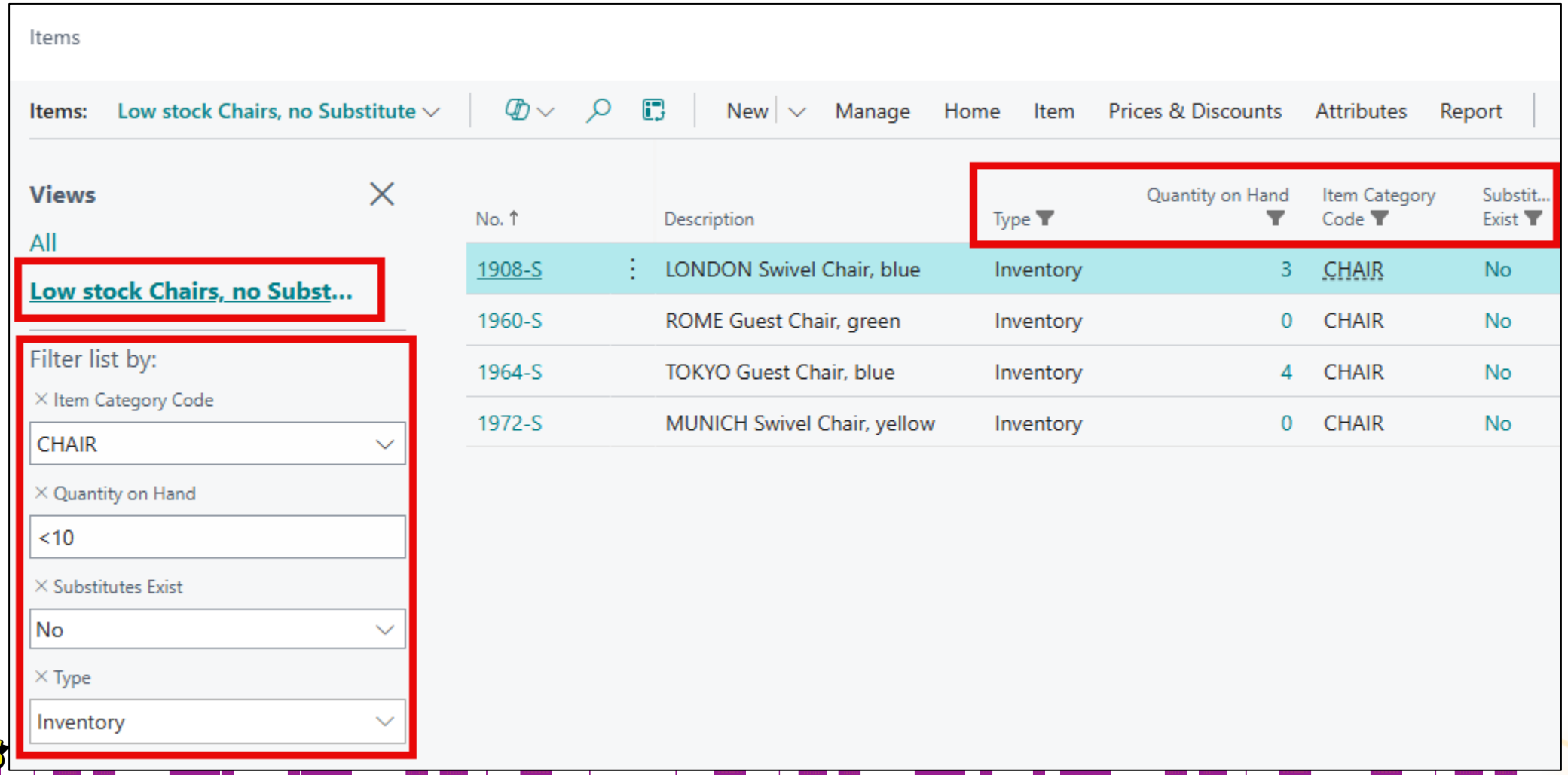
Additional dimensions in Financial Reporting



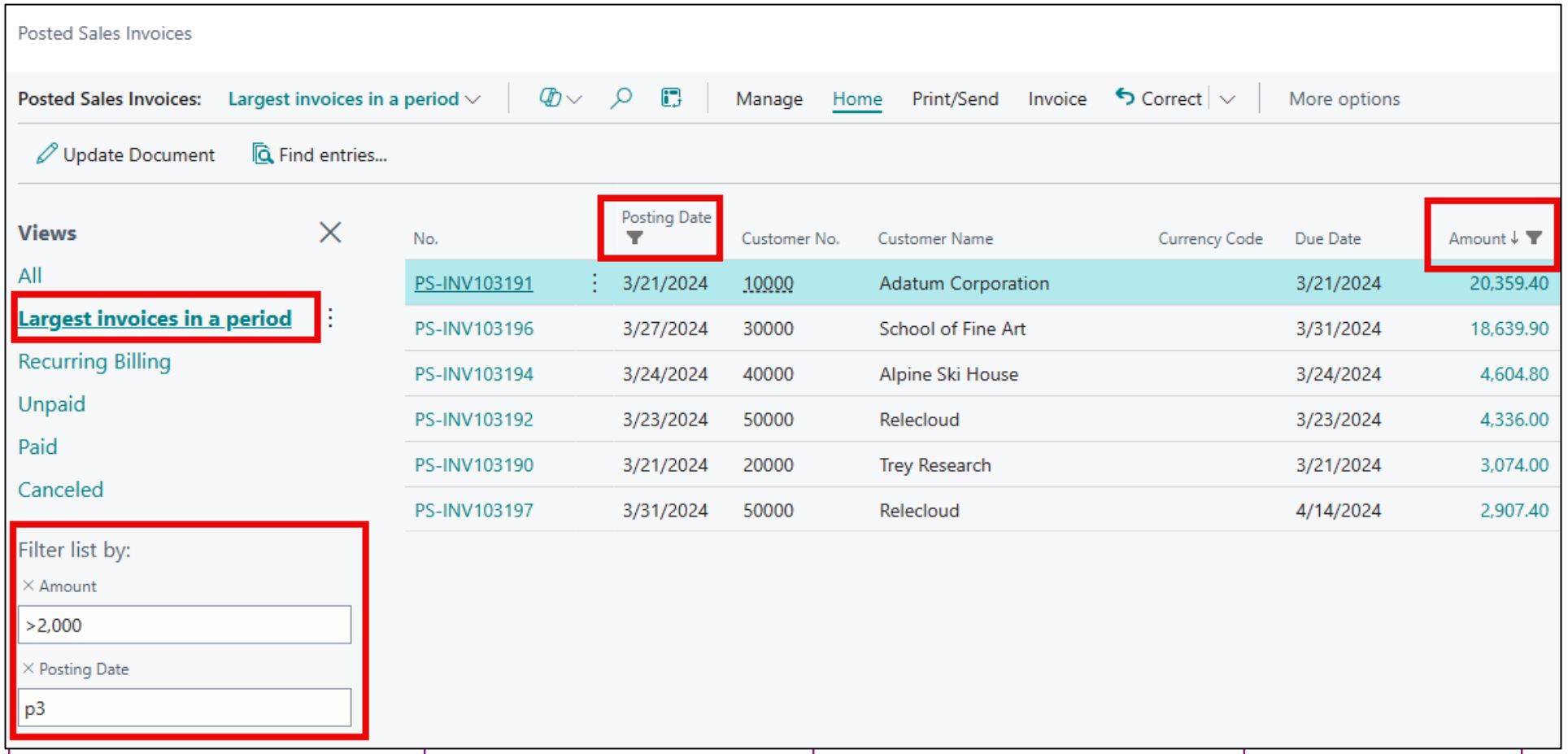
Target Audience

Filtered Views, Chart of Accounts

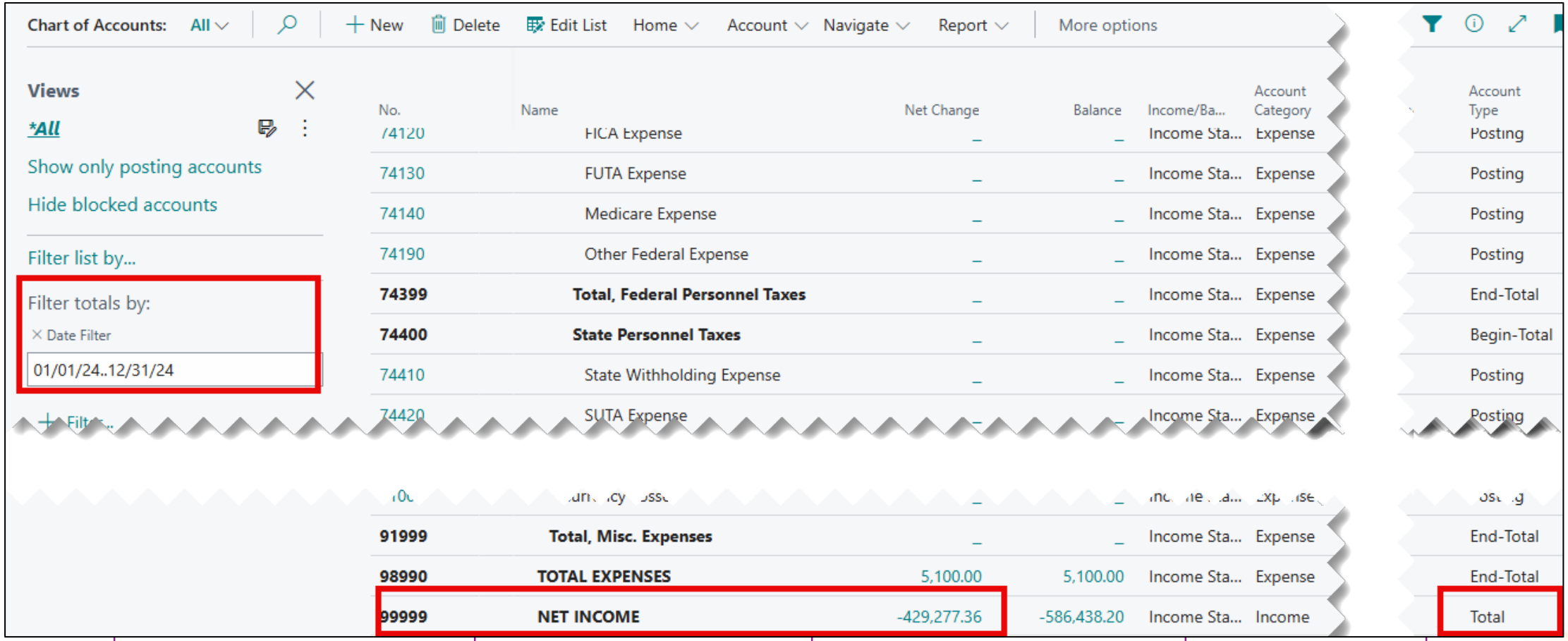
Filtered Views – What are they?



Filtered Views – What are they?



Filtered Views – What are they?

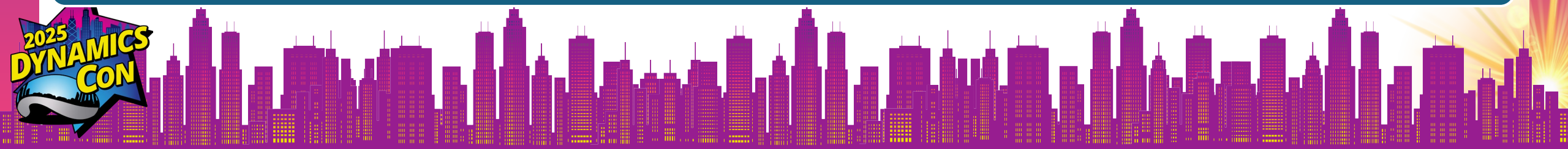


Filtered Views – How do I find them?

Lists

Filtered Views – When should I use them?

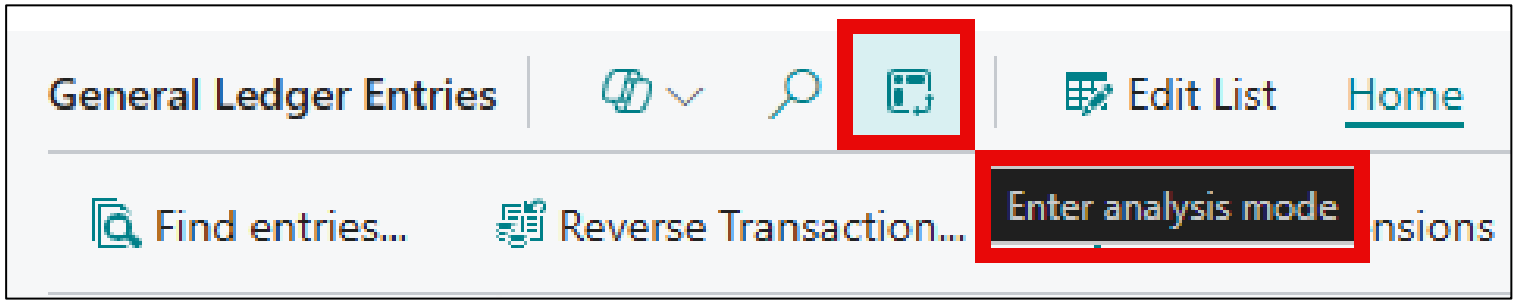
- Drill into the data in Business Central
- Dynamic/Real-time reports
- Want to keep the data for later
- Share with team to see the same data
- Looking for fast statistics
- Want to sort data



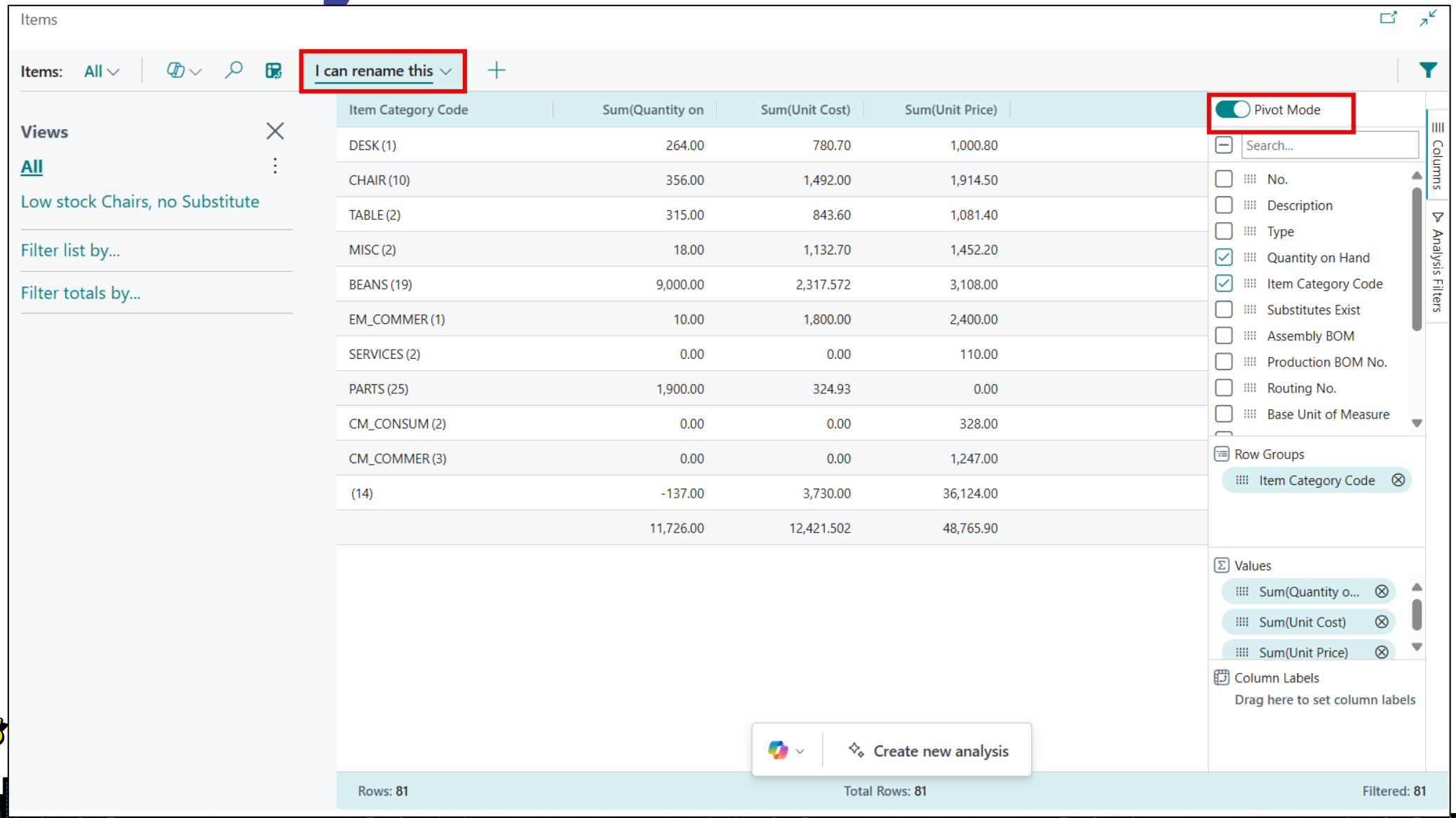
Target Audience

Data Analysis

Data Analysis – What is it?



Data Analysis – What is it?



Data Analysis – How do I find it?

Lists

Data Analysis – When should I use it?

- Manipulate data without leaving BC
- Pivot data in BC
- View totals on columns
- Create data analysis tabs to reuse
- Ad Hoc Analysis

Target Audience

Detailed data

Staff

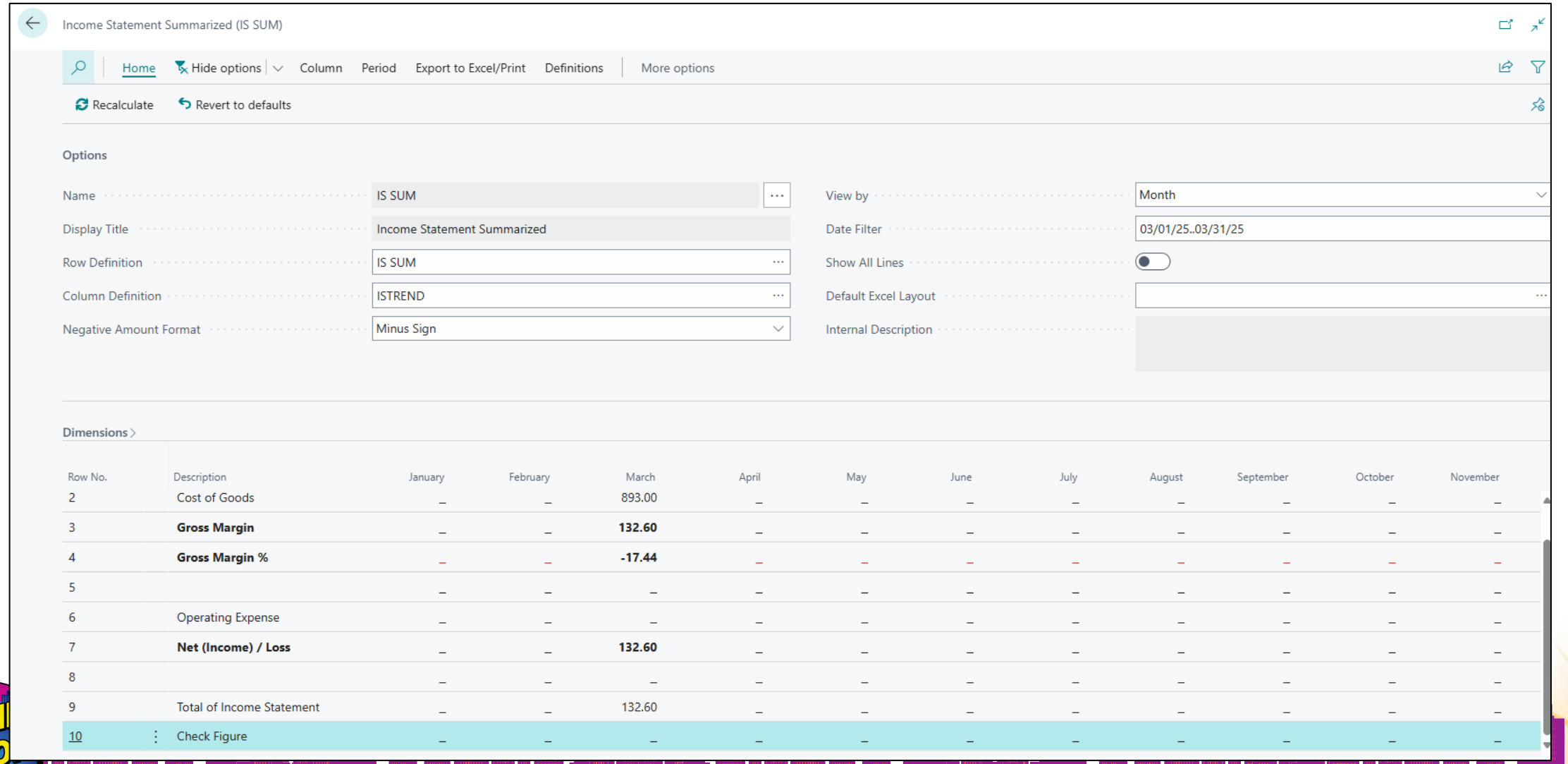
Financial Reports

Financial Reports – What are they?

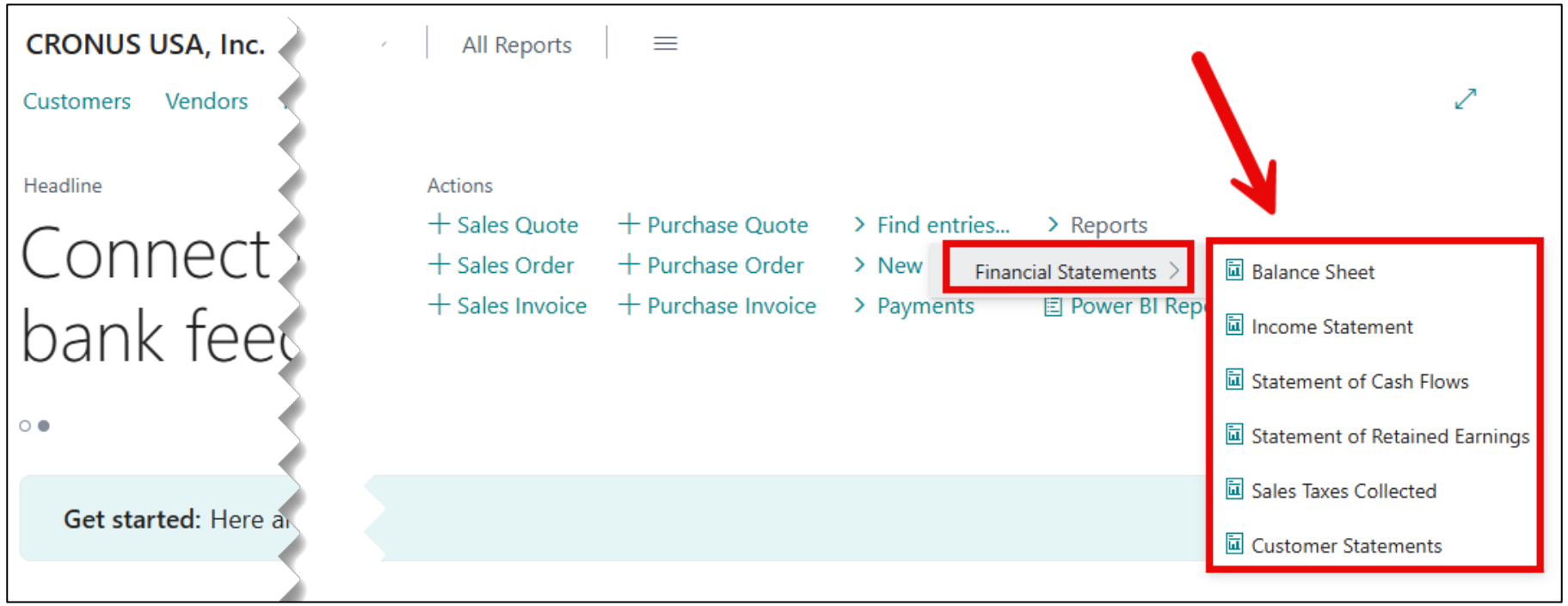
The **Financial Reports** feature gives you insights into the financial data shown on your chart of accounts (COA). You can set up financial reports to analyze figures in general ledger (G/L) accounts, and compare general ledger entries with budget entries. The results display in charts and reports in your Role Center, such as the Cash Flow chart, and the Income Statement and Balance Sheet reports.

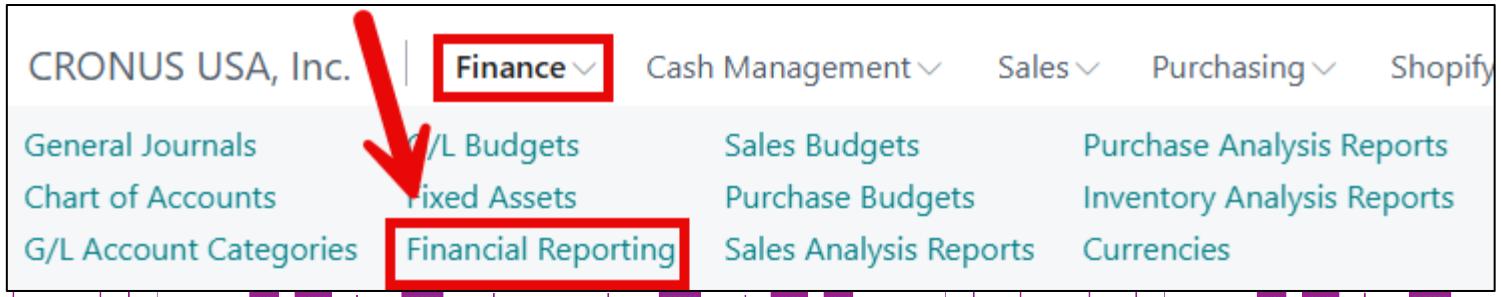
Business Central provides sample financial reports you can use right away as templates. You can also set up your own reports to specify the figures to compare. For example, you can create financial reports to calculate profit margins using dimensions such as departments or customer groups. The number of financial reports you can create is unlimited and require no involvement of a developer.

Financial Reports – What are they?



Financial Reports – How can I find them?





Financial Reports – When should I use them?

View standard financial reports

- Income Statement
- Balance Sheet
- Statement of Cash Flow
- Statement of Shareholder's Equity

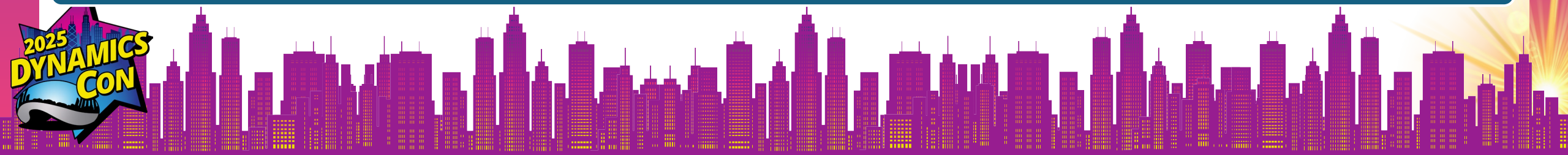
Use dimensions in reporting

Use filters in reporting

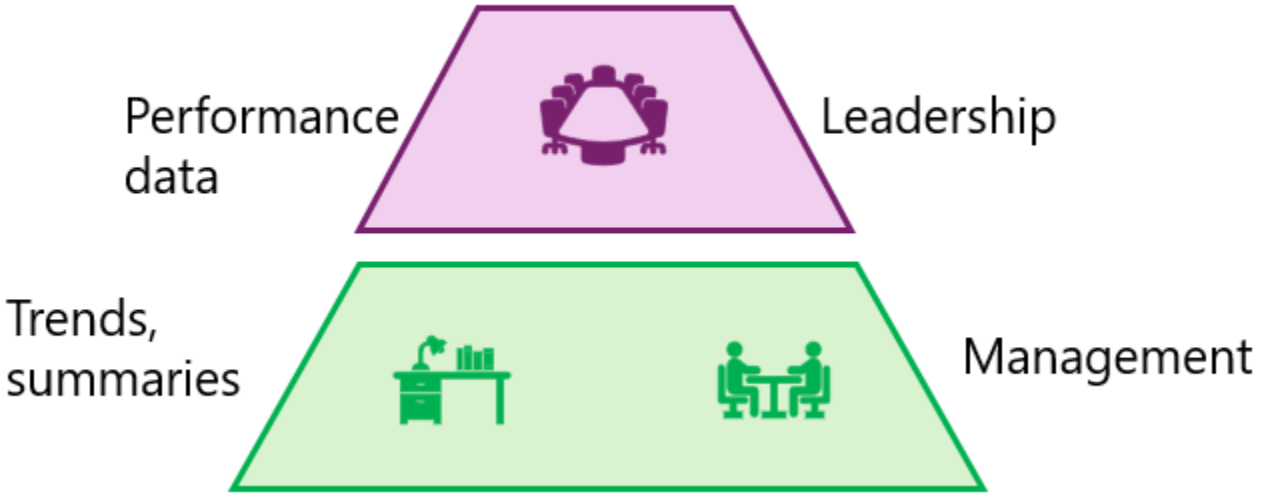
Total/subtotal GL accounts

Compare to G/L Budget

Build in periods of time



Target Audience



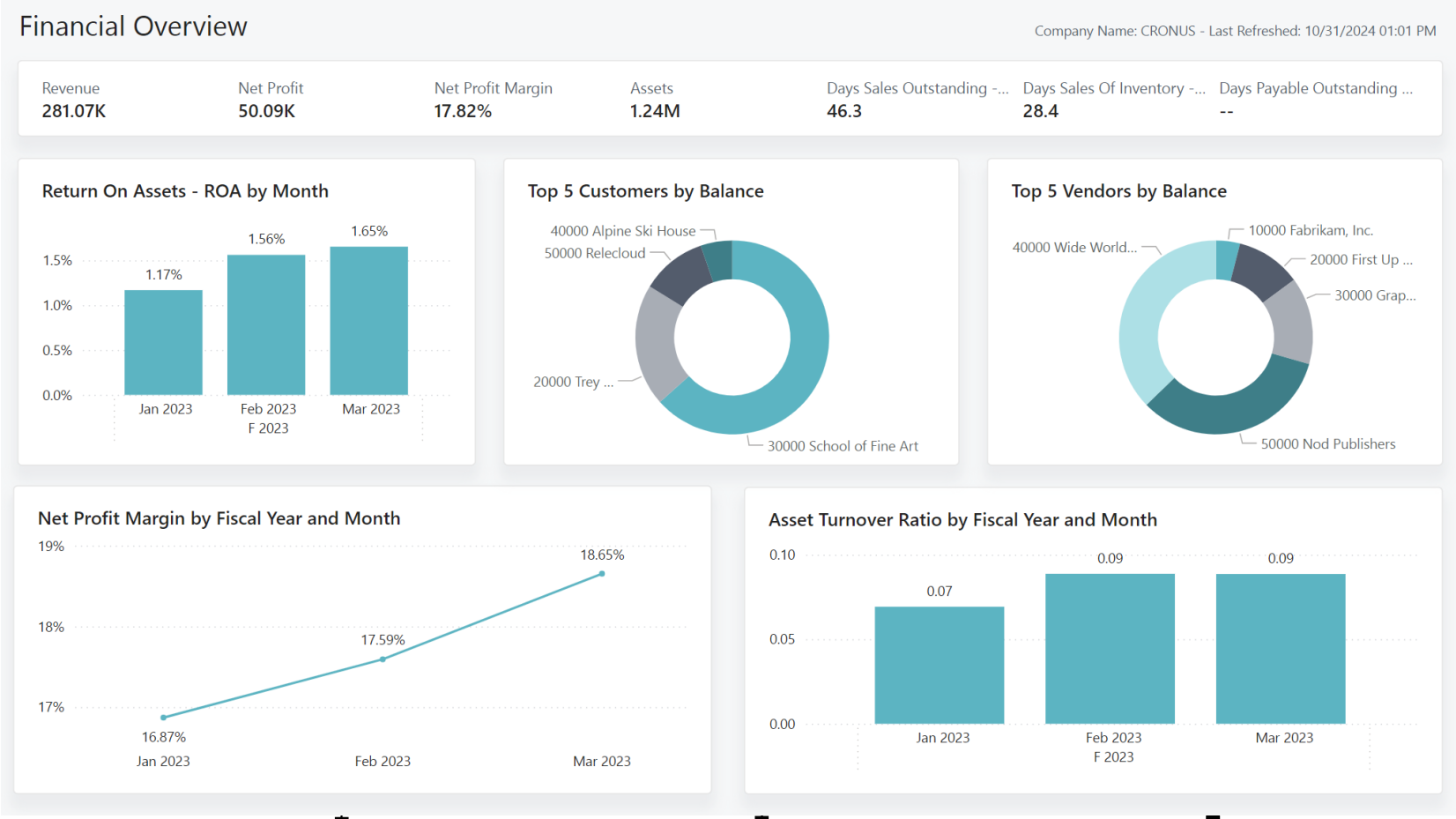
Pre-Built Power BI Reports

Power BI – What is it?

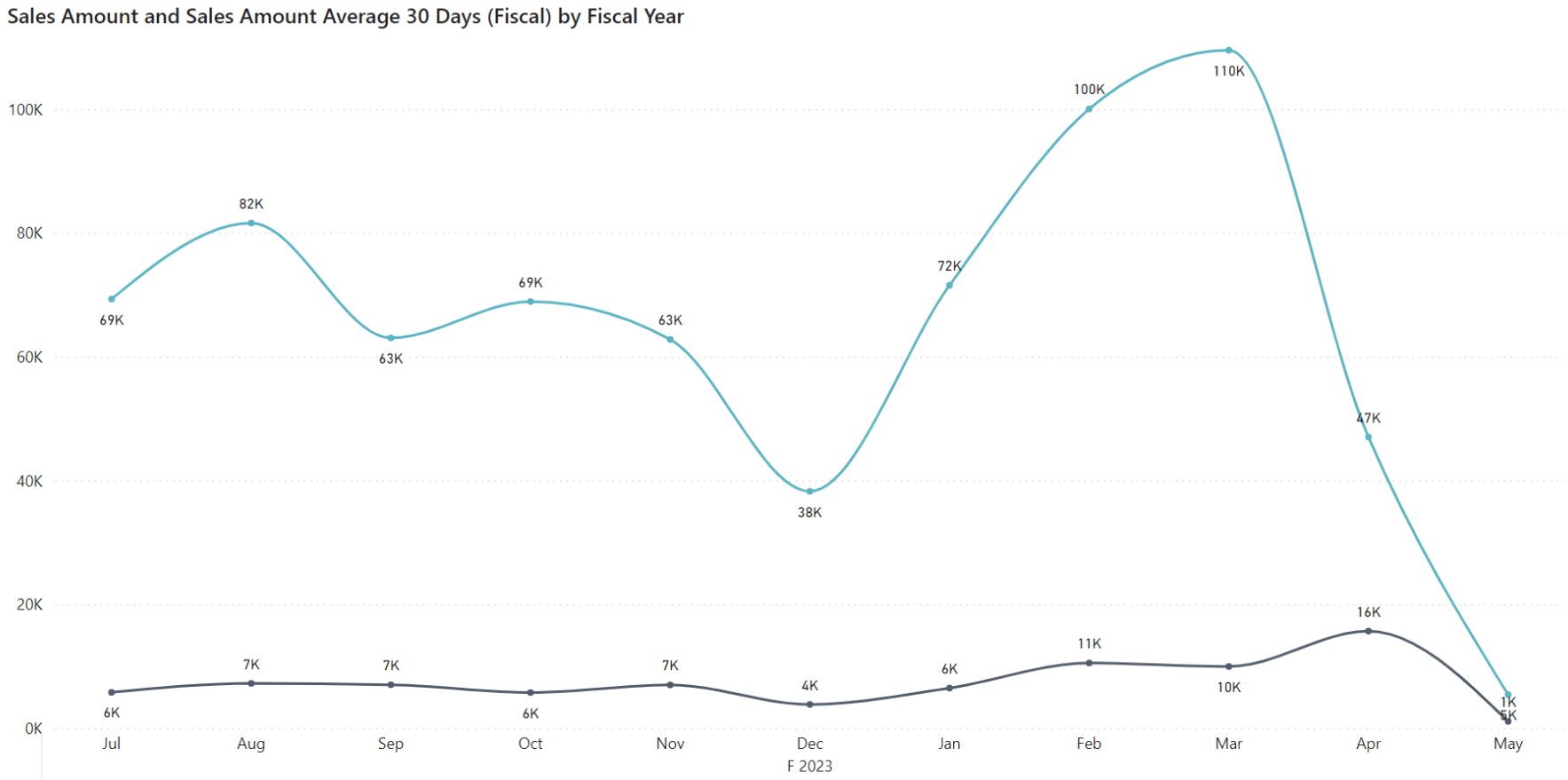
- Data visualization system from Microsoft
- Retrieves data from BC to built reports and dashboards
- Flexible alternative to reports built into BC
- Enables drill-down and ability to customize visualization
- Merge data from different companies in BC
- Can embed some in Business Central

https://learn.microsoft.com/en-us/dynamics365/business-central/admin-powerbi

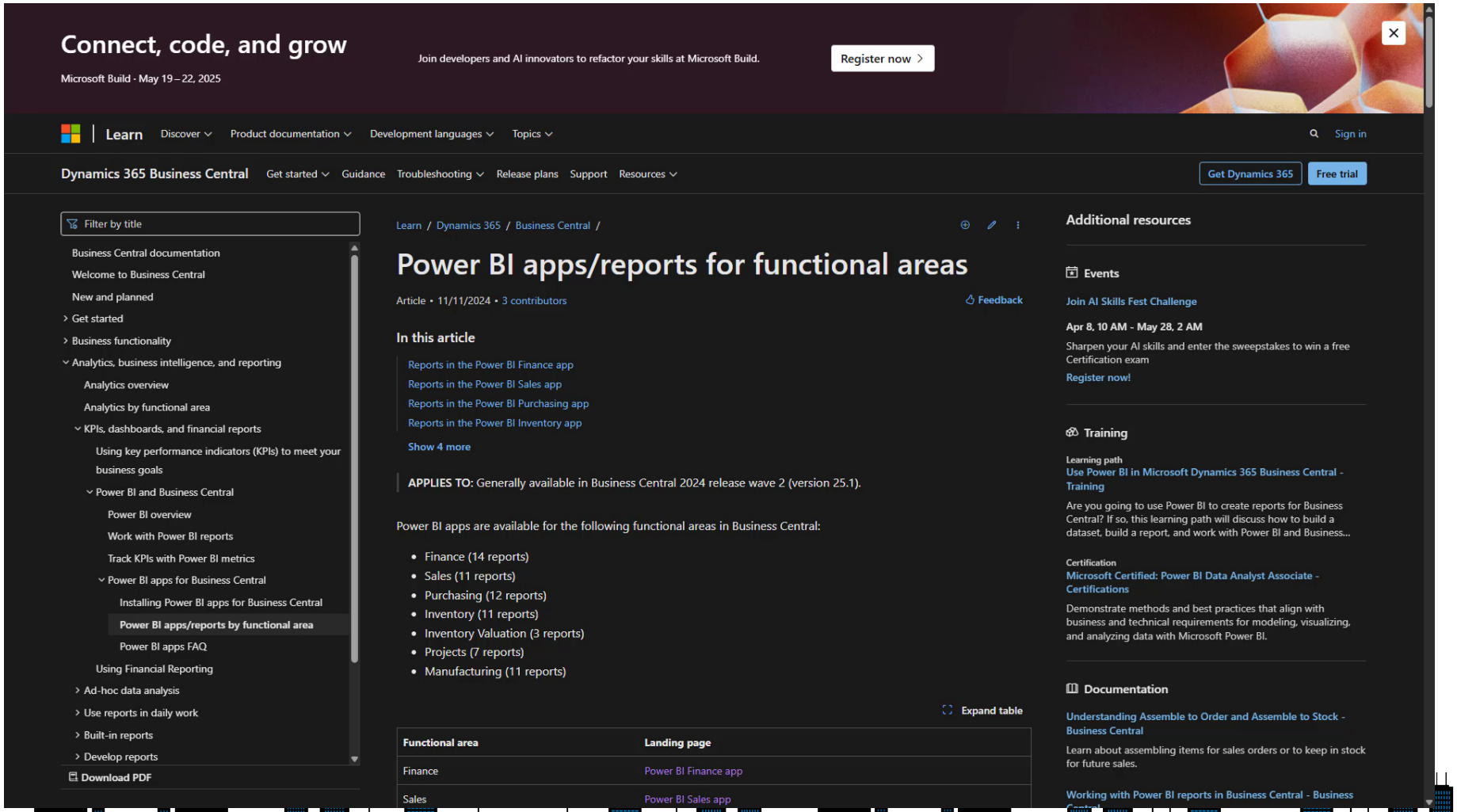
Pre-Built Power BI Reports – What are they?



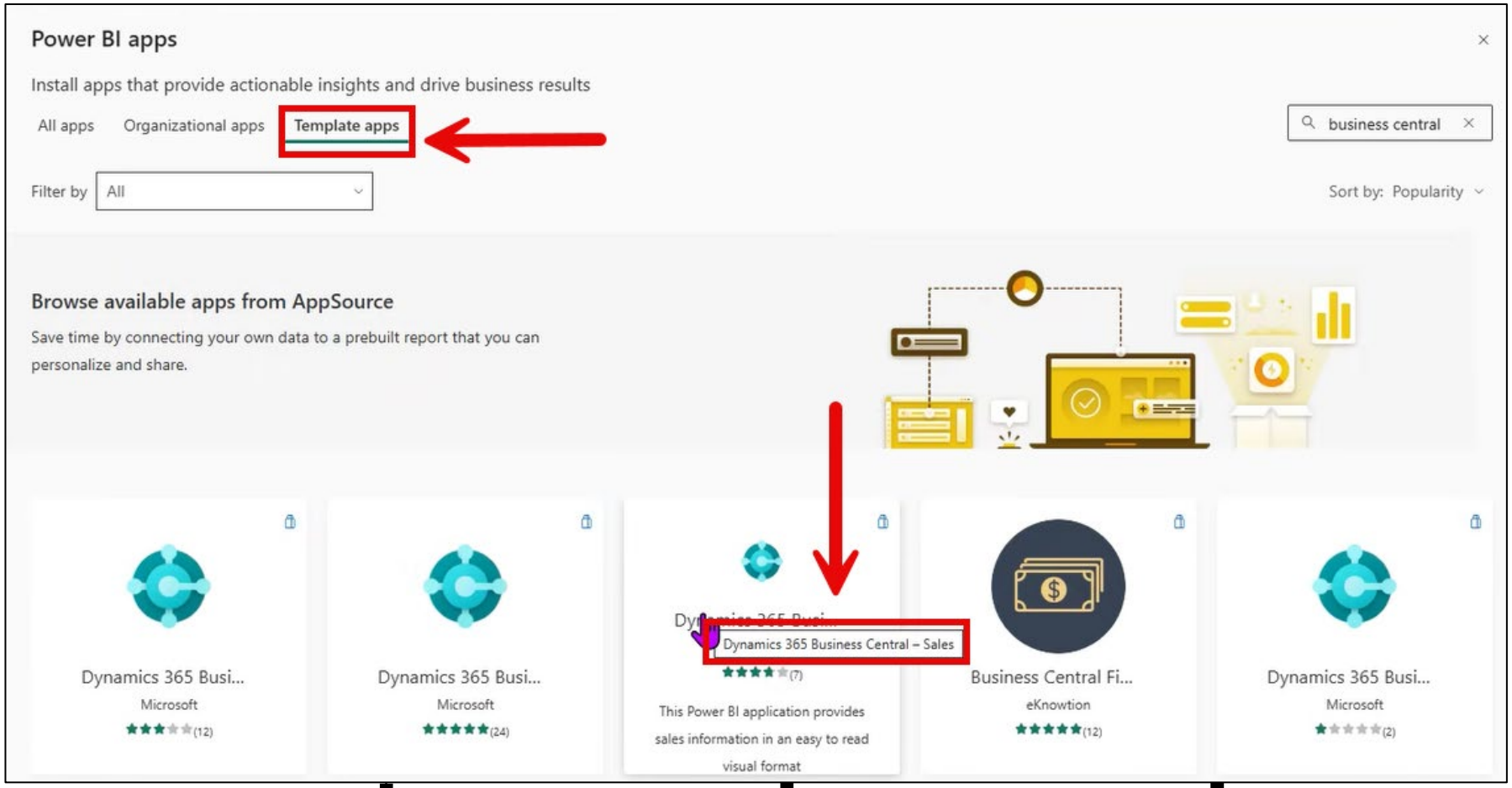
Pre-Built Power BI Reports – What are they?



Microsoft Documentation



Pre-Built Power BI Reports – How do I find them?



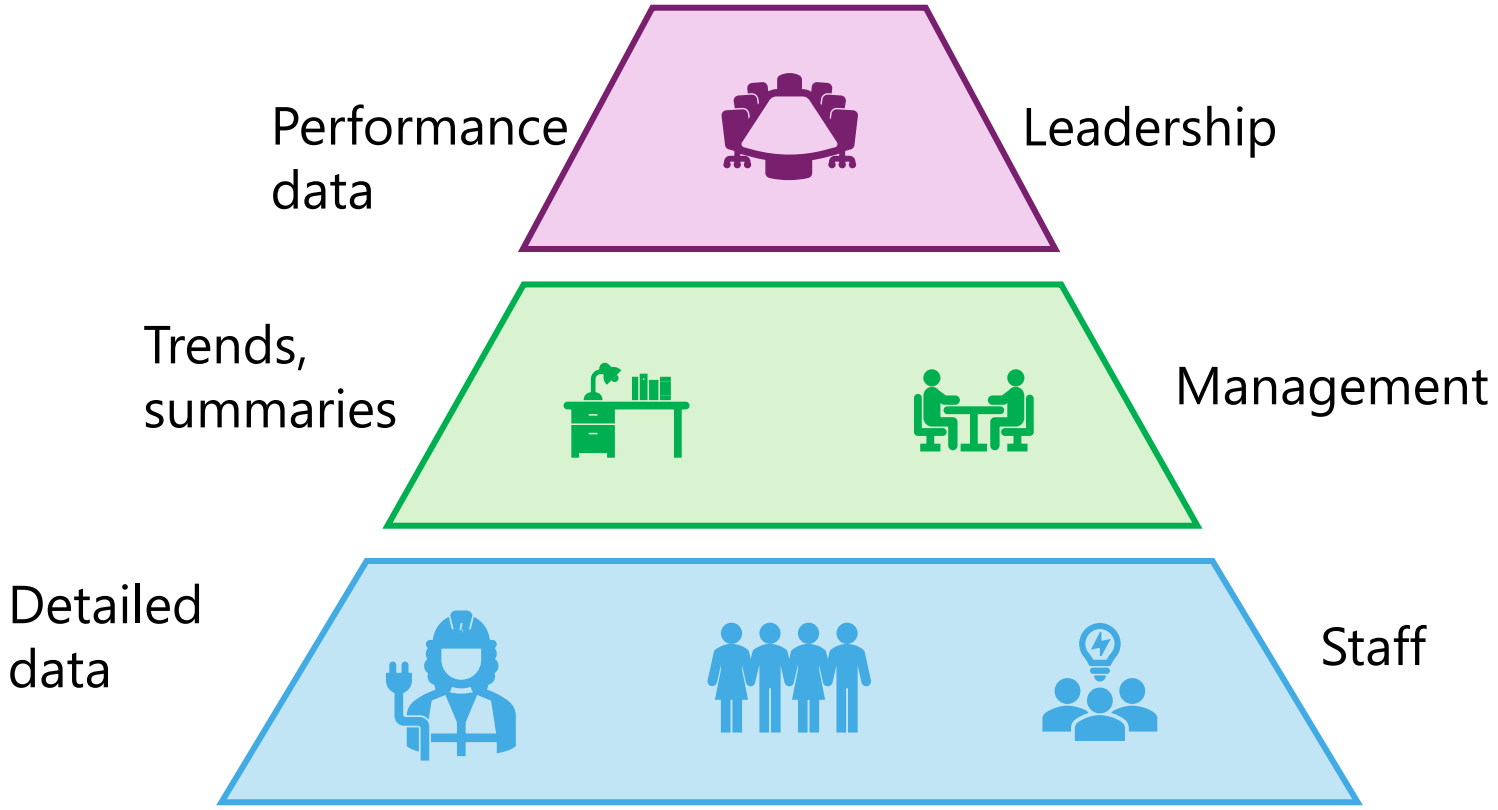
Microsoft Documentation

- https://learn.microsoft.com/en-us/dynamics365/business-central/across-powerbi-apps-by-functional-area
- https://learn.microsoft.com/en-us/dynamics365/business-central/finance-powerbi-app
- https://learn.microsoft.com/en-us/dynamics365/business-central/finance-powerbi-app-setup

Pre-Built Power BI Reports – When should I use them?

- Visualize data or information
- View information in a way that isn’t available in Business Central
- Other reports just aren’t enough
- Quick picture of what is going on

Target Audience



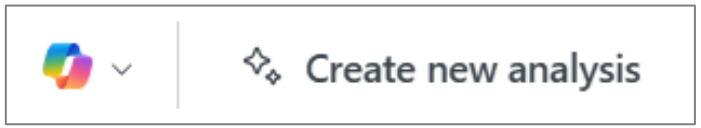
CoPilot

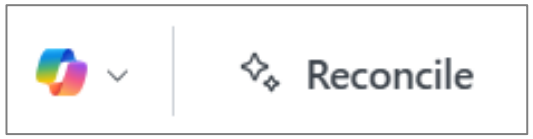
CoPilot – What is it?

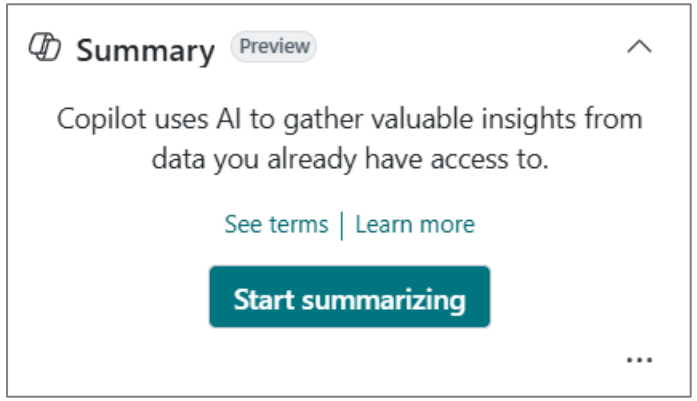
Microsoft’s AI-powered assistant

Can be accessed through Microsoft products, including Business Central

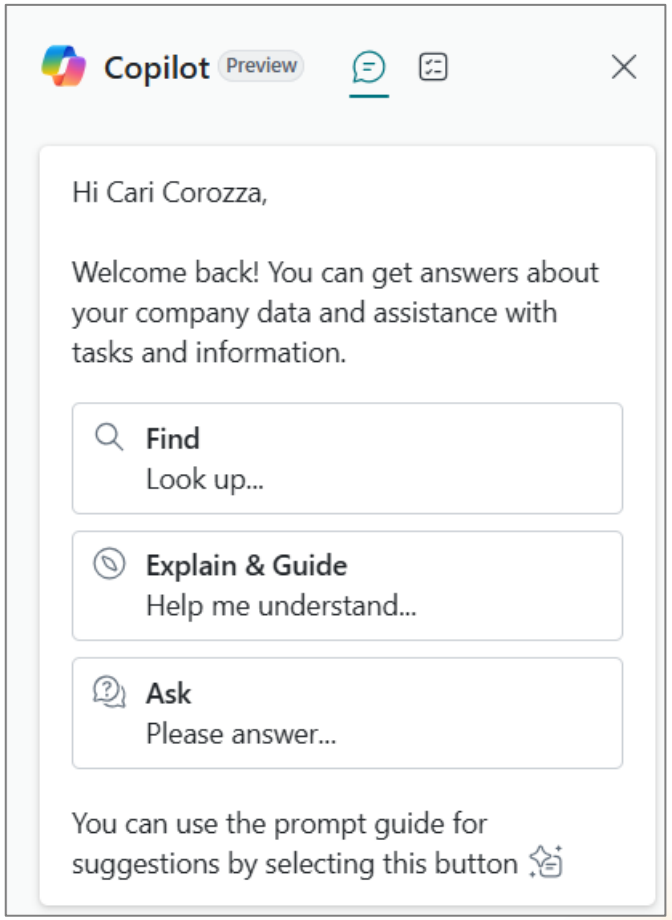
CoPilot – How can I find it?







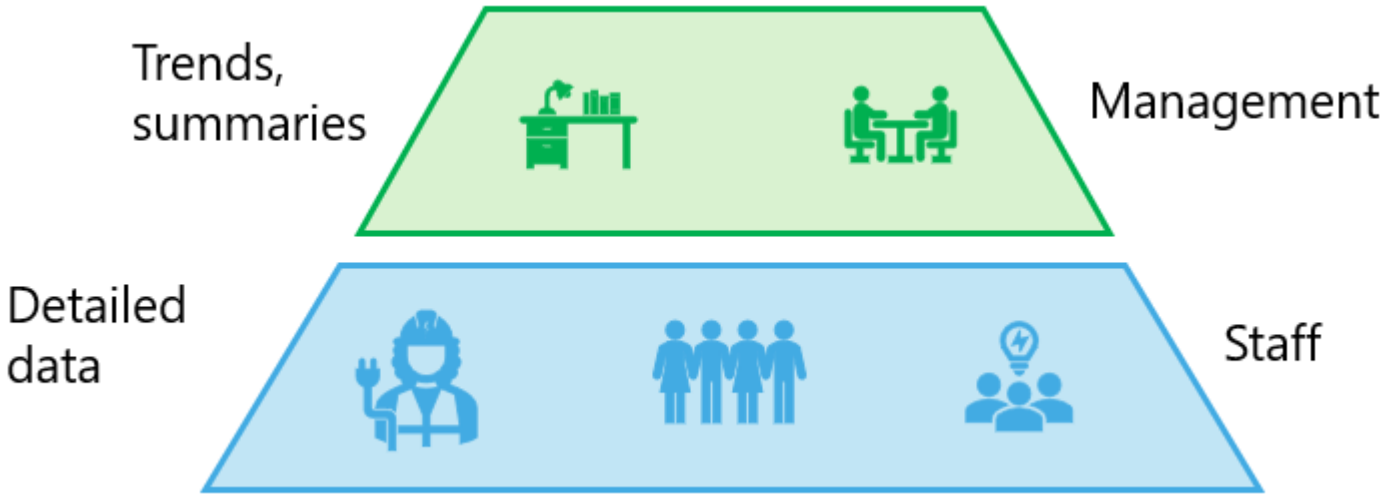
You can't avoid it!



CoPilot – When should I use it?

- Want an overview or summary of a record
- To assist in pivoting, formatting or manipulating data
- Want to provide a prompt and get information back

Target Audience



Recent Improvements to Reporting

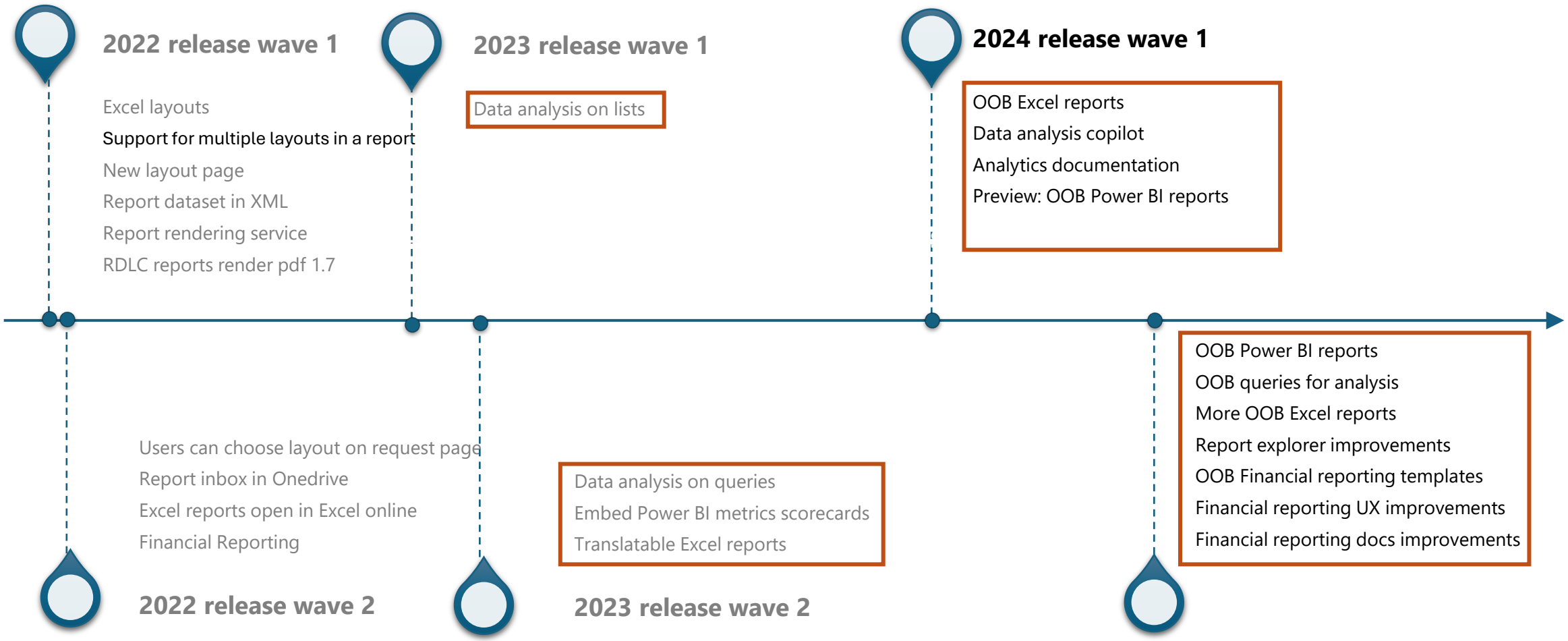
Recent Improvements

- OOB Power BI reports
- OOB queries for analysis
- More OOB Excel reports
- Report explorer improvements
- OOB Financial reporting templates
- Financial reporting UX improvements
- Financial reporting docs improvements

Reporting timeline

= UX improvements

= Self-service reporting and analytics



2025 DYNAMICS CON

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