



# 2025 DYNAMICS CON

The logo features the text "2025 DYNAMICS CON" in a large, bold, yellow, comic-style font with thick black outlines. The text is set against a vibrant background of a city skyline with blue and purple buildings under a pink and orange sky. A stylized grey and white wave is positioned below the word "DYNAMICS". In the top right corner, there is a circular logo with the letters "BC" in yellow on a blue background, with yellow starburst effects. In the bottom right corner, two comic book characters are sitting on a fountain.

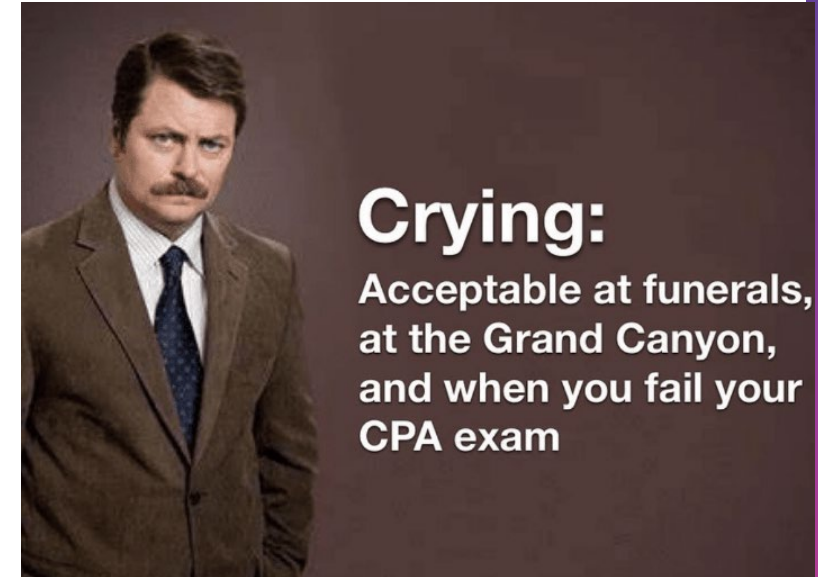


# Reporting Navigator:

## Choosing the Right BC Reporting Tool for Every Need



LinkedIn



**Cari Corozza**  
**Controller &  
Trainer/Consultant**  
**New View Strategies**



# Objectives



Review types of reports available within and for BC



How to find the reports



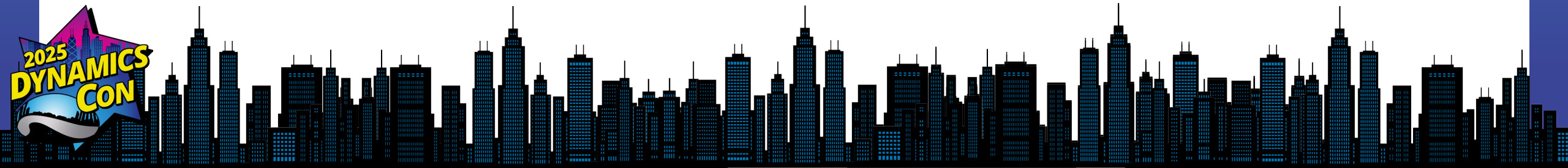
Show different reporting options and use cases



NOT instructional or step-by-step



Share Microsoft improvements to reporting





# Reporting in Business Central

Standard Analytical Reports (now with Excel layouts!)

Analysis Views (NOT Data Analysis)

Filtered Views, Chart of Accounts

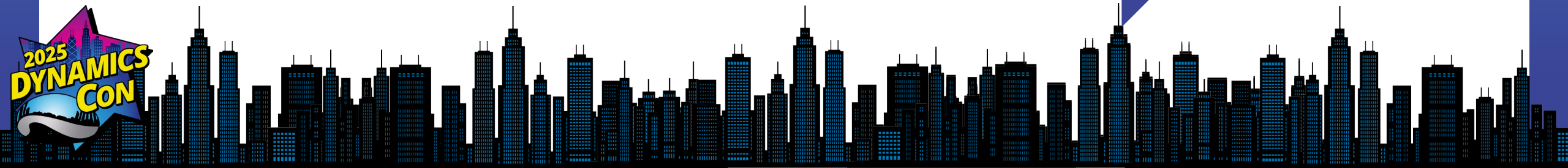
Data Analysis

Financial Reports

Pre-Built Power BI Reports

CoPilot

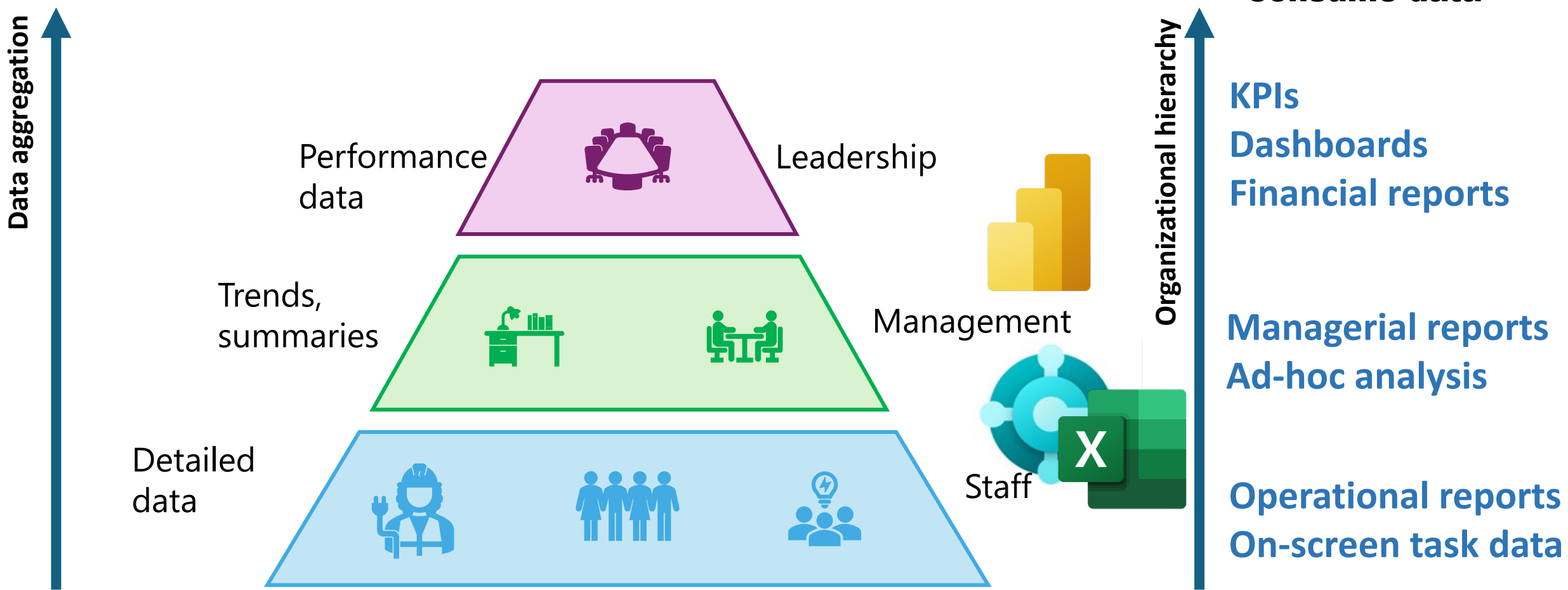
Recent Improvements to reporting



# Who is using the report?



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



# Standard Analytical Business Central reports





# Standard Analytical Business Central reports – What are they?

**Vendor Purchases by Item**

All Purchases to Date  
CRONUS International Ltd.

Thursday, April 24, 2025 4:34 PM

Page 1  
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   |
|---|--------------------------|-------------------|------------------------|-----------------|-------------------|---------------|
| <b>1896-S      ATHENS Desk      Base Unit of Measure: PCS</b>               |                          |                   |                        |                 |                   |               |
| 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        |
| <b>Total for Item No.: 1896-S</b>   |                          | <b>184.00</b>     | <b>143,648.80</b>      | <b>0.00</b>     | <b>143,648.80</b> | <b>780.70</b> |
| <b>1900-S      PARIS Guest Chair, black      Base Unit of Measure: PCS</b>  |                          |                   |                        |                 |                   |               |
| 50000   | Nod Publishers           | 120.00            | 18,036.00              | 0.00            | 18,036.00         | 150.30        |
| <b>Total for Item No.: 1900-S</b>   |                          | <b>120.00</b>     | <b>18,036.00</b>       | <b>0.00</b>     | <b>18,036.00</b>  | <b>150.30</b> |
| <b>1906-S      ATHENS Mobile Pedestal      Base Unit of Measure: PCS</b>    |                          |                   |                        |                 |                   |               |
| 30000   | Graphic Design Institute | 109.00            | 36,863.80              | 0.00            | 36,863.80         | 338.20        |
| <b>Total for Item No.: 1906-S</b>   |                          | <b>109.00</b>     | <b>36,863.80</b>       | <b>0.00</b>     | <b>36,863.80</b>  | <b>338.20</b> |
| <b>1908-S      LONDON Swivel Chair, blue      Base Unit of Measure: PCS</b> |                          |                   |                        |                 |                   |               |
| 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        |
| <b>Total for Item No.: 1908-S</b>   |                          | <b>78.00</b>      | <b>11,551.80</b>       | <b>0.00</b>     | <b>11,551.80</b>  | <b>148.10</b> |
| <b>1920-S      ANTWERP Conference Table      Base Unit of Measure: PCS</b>  |                          |                   |                        |                 |                   |               |
| 40000   | Wide World Importers     | 87.00             | 43,969.80              | 0.00            | 43,969.80         | 505.40        |
| <b>Total for Item No.: 1920-S</b>   |                          | <b>87.00</b>      | <b>43,969.80</b>       | <b>0.00</b>     | <b>43,969.80</b>  | <b>505.40</b> |



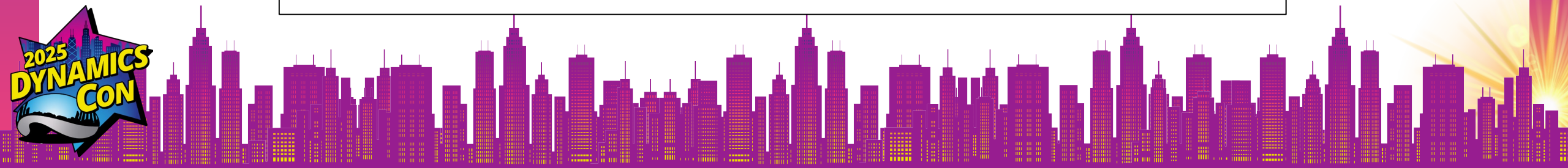
# Standard Analytical Business Central reports – What are they?

## Customer - Order Summary

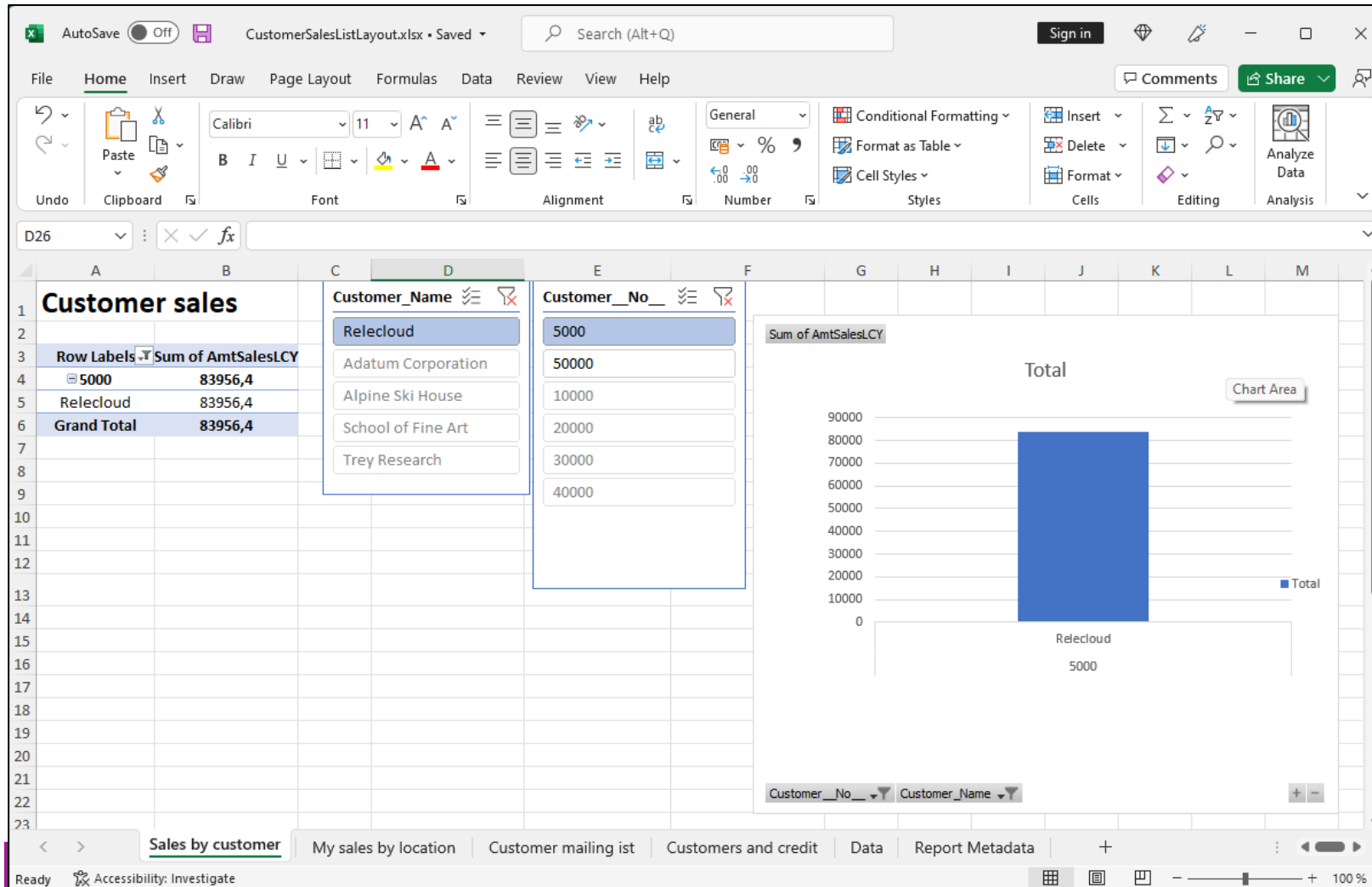
CRONUS USA, Inc.  
Outstanding Orders

Thursday, April 24, 2025  
Page 1 / 1  
CARI

| Customer No. | Name               | ...before | 06/04/25<br>07/03/25 | 07/04/25<br>08/03/25 | 08/04/25<br>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?



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

CRONUS USA, Inc. | All Reports & Analysis Administration | Find | ...

← **Finance**  
> Explore  
Power BI Reports (19)  
General Ledger (5)  
Cash Management (1)  
Cost Accounting (1)  
Receivables (1) ▾  
Payables (1)  
Fixed Assets (1)  
Inventory (2)  
^

**Purchasing**  
> Explore  
Power BI Reports (14)  
Purchasing (2)  
- Budgets & Analysis (5)  
- Reports (8)  
- Purchase Advice  
- Item/Vendor Catalog  
- Aged Accounts Payable  
- Vendor Purchases by Item  
- Item Charges - Specification  
- Item Substitutions  
- Purchase Advice  
- Purchasing Deferral Summary  
Planning (1)  
Inventory & Costing (1)  
Setup (1)



**Human Resources**  
> Explore  
Employees (1)  
^


**Resource**  
> Explore  
Resources (1)  
^

**Inventory and Warehouse**  
> Explore  
Power BI Reports (12)  
Planning & Operations (1)  
Goods Handling (1)  
Assembly (1)  
^




**Sales And Marketing**  
> Explore  
Power BI Reports (11)  
Sales (2)  
Order Processing (1)  
Marketing (1)  
Inventory & Pricing (1)  
Setup (1)  
^

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

Tell me what you want to do  



Go to Reports and Analysis Show all (44)

|   |                      |
|---|----------------------|
|  Daily Purchases   | Reports and Analysis |
|  Purchase Advice   | Reports and Analysis |
|  Purchases Report | Reports and Analysis |

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

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Shopify

All Reports

Customers

Vendors

Items

Bank Accounts

Chart of Accounts

Purchase Advice

Headline

Want to learn more about Business Central?

Get started: Here are a few things you can try out

Activities

Sales This Month

Overdue Sales Invoice Amount

Overdue Purch. Invoice Amount

Sales Invoices Predicted Overdue

\$0

\$70,024

\$49,422

0

See more

See more

See more

See more

Ongoing Sales

Ongoing Purchases

Payments

Sales Quotes

Sales Orders

Completely Re...

Sales Invoices

Purchase Orders

Ongoing Purc...

Purch. Invoices...

Unprocessed

Actions

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

Find entries...

New

Legacy

Reports

Excel Reports

Trial Balance/Budget

Trial Balance (Preview)

Trial Balance by Period

Trial Balance/Previous Year

Aged Accounts Receivable (Preview)

Customer - Top List

Vendor - Top List

Aged Accounts Payable (Preview)

Consolidated Trial Balance

Fixed Asset Analysis

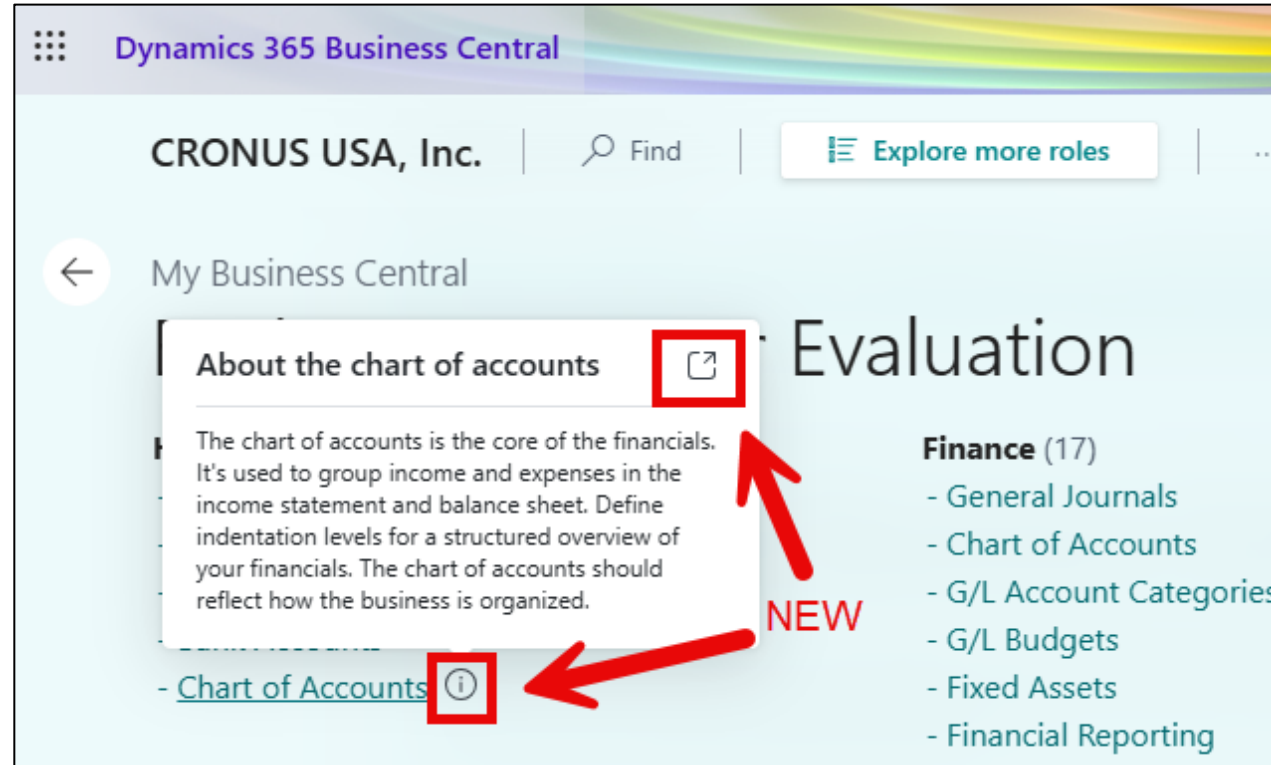
Fixed Asset Details

Fixed Asset Projected Value





# 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

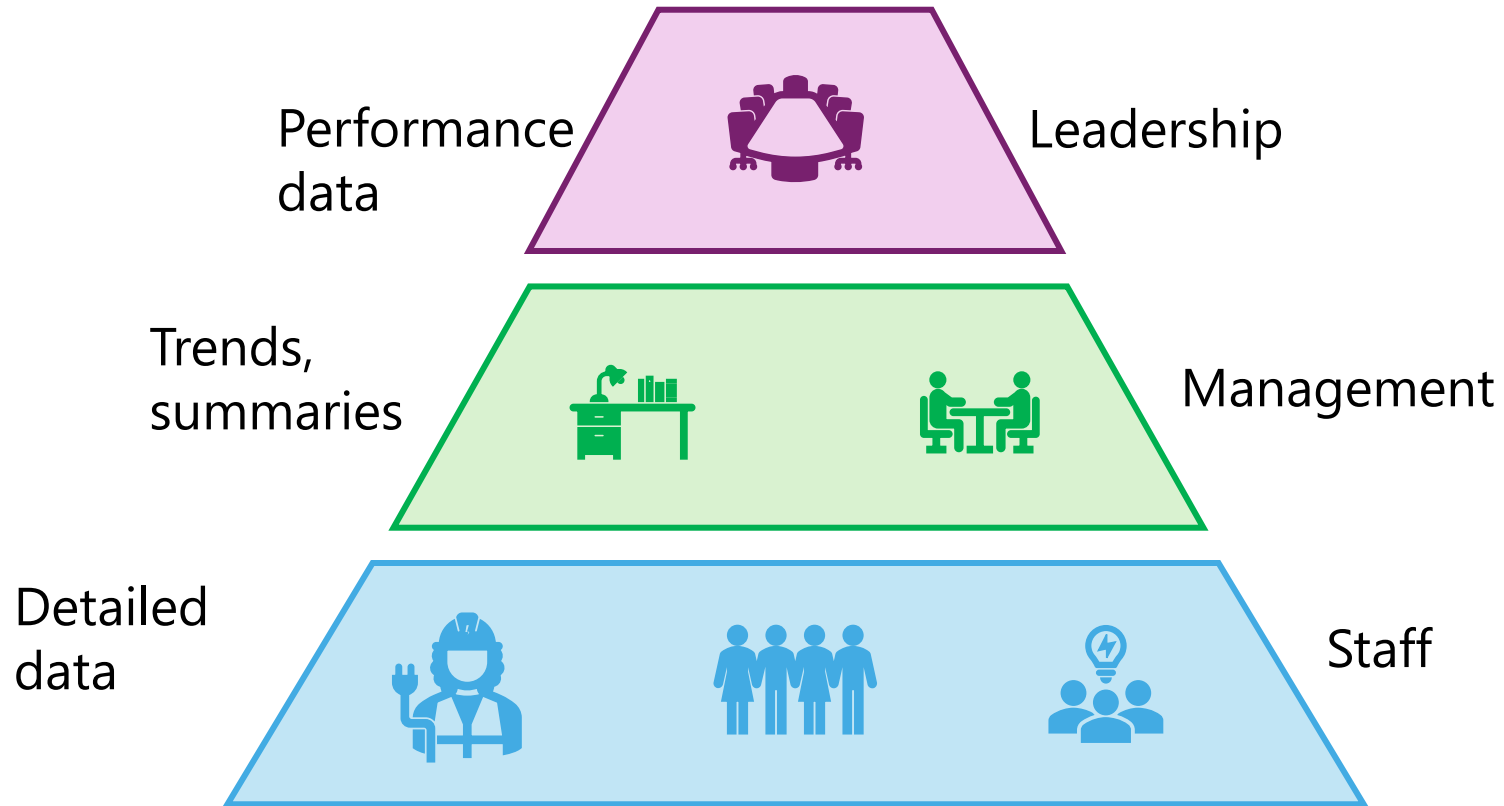
If someone asks, “Do we have a report that shows XYZ?”

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

🔗 🔍 📄 | + New Manage ✎ Analysis by Dimensions ↻ Update | More options 🔗 🔍 ☰

| Code ↑              | Name           | Account Source | Incl... Bud...           | Last Date Updated | Dimension 1 Code | Dimension 2 Code | Dimension 3 Code |
|---------------------|----------------|----------------|--------------------------|-------------------|------------------|------------------|------------------|
| <u>GEN_LEDGER</u> ⋮ | General Ledger | G/L Account    | <input type="checkbox"/> |                   |                  |                  |                  |
| REVENUE             | Sales Revenue  | G/L Account    | <input type="checkbox"/> |                   | AREA             | DEPARTMENT       | CUSTOMERG..      |

← Analysis View Card

✎ 🔗 + 🗑️ ✓ Saved 🔗 🔗

## GEN\_LEDGER · General Ledger

↻ Update 🔍 Filter ↻ Enable Update on Posting ↻ Disable Update on Posting ⚙️ Reset | More options

**General**

Code ..... GEN\_LEDGER Last Date Updated .....

Name ..... General Ledger Last Entry No. .... 0

Account Source ..... G/L Account Last Entry No. ....

-----

**Dimensions**

Dimension 1 Code ..... ⌵ Dimension 3 Code ..... ⌵

Dimension 2 Code ..... ⌵ Dimension 4 Code ..... ⌵

# Analysis Views – How do I find them?



SYSTEM SEARCH



BOOKMARK





# Analysis Views – When should I use them?

On their own for data analysis

Analysis by Dimensions Matrix - REVENUE

Export to Excel

| 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  | —            | —         | —         | —          |

Close

Analysis by Dimensions Matrix - REVENUE

Export to Excel

| 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 |

Close

# Analysis Views – When should I use them?

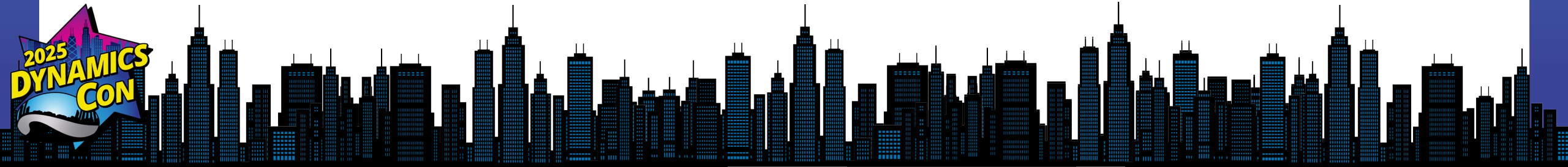
Additional dimensions in Financial Reporting

Financial Reporting: All | 🔍 | + New | 🛠 Edit List | 🔗 View Financial Report | Edit definitions | Copy/Export/Import | More options

| Name ↑     | Display Title               | Row Definition | Row Analysis View Name | Column Definition | Column Analysis View Name |
|------------|-----------------------------|----------------|------------------------|-------------------|---------------------------|
| ACC-CAT    | Account Categories overview | ACC-CAT        |                        | PERIODS           |                           |
| M-INCOME   | Income Statement            | M-INCOME       |                        | M-NETCHANG        |                           |
| M-RETAINED | Retained Earnings           | M-RETAINED     |                        | M-NETCHANG        |                           |
| REVENUE    | Revenues                    | REVENUE        | REVENUE                | BUDGANALYS        |                           |
| TB         | Trial Balance               | TB             |                        | BBDRCREB          |                           |



# Target Audience



# Filtered Views, Chart of Accounts



# Filtered Views – What are they?

Items

Items: **Low stock Chairs, no Substitute** | [Link] | [Search] | [New] | [Manage] | Home | Item | Prices & Discounts | Attributes | Report

**Views** ×

All

**Low stock Chairs, no Subst...**

Filter list by:

- × Item Category Code  
CHAIR
- × Quantity on Hand  
<10
- × Substitutes Exist  
No
- × Type  
Inventory

| No. ↑                  | Description                 | Type ▼    | Quantity on Hand ▼ | Item Category Code ▼ | Substitutes Exist ▼ |
|------------------------|-----------------------------|-----------|--------------------|----------------------|---------------------|
| <a href="#">1908-S</a> | LONDON Swivel Chair, blue   | Inventory | 3                  | CHAIR                | No                  |
| 1960-S                 | ROME Guest Chair, green     | Inventory | 0                  | CHAIR                | No                  |
| 1964-S                 | TOKYO Guest Chair, blue     | Inventory | 4                  | CHAIR                | No                  |
| 1972-S                 | MUNICH Swivel Chair, yellow | Inventory | 0                  | CHAIR                | No                  |

# Filtered Views – What are they?

Posted Sales Invoices

Posted Sales Invoices: **Largest invoices in a period** | | | | Manage [Home](#) | Print/Send | Invoice | Correct | More options

Update Document Find entries...

| Views                               | No.                          | Posting Date | Customer No. | Customer Name      | Currency Code | Due Date  | Amount ↓  |
|-------------------------------------|------------------------------|--------------|--------------|--------------------|---------------|-----------|-----------|
| All                                 | <a href="#">PS-INV103191</a> | 3/21/2024    | 10000        | Adatum Corporation |               | 3/21/2024 | 20,359.40 |
| <b>Largest invoices in a period</b> | <a href="#">PS-INV103196</a> | 3/27/2024    | 30000        | School of Fine Art |               | 3/31/2024 | 18,639.90 |
| <a href="#">Recurring Billing</a>   | <a href="#">PS-INV103194</a> | 3/24/2024    | 40000        | Alpine Ski House   |               | 3/24/2024 | 4,604.80  |
| <a href="#">Unpaid</a>              | <a href="#">PS-INV103192</a> | 3/23/2024    | 50000        | Relecloud          |               | 3/23/2024 | 4,336.00  |
| <a href="#">Paid</a>                | <a href="#">PS-INV103190</a> | 3/21/2024    | 20000        | Trey Research      |               | 3/21/2024 | 3,074.00  |
| <a href="#">Canceled</a>            | <a href="#">PS-INV103197</a> | 3/31/2024    | 50000        | Relecloud          |               | 4/14/2024 | 2,907.40  |

Filter list by:

× Amount

>2,000

× Posting Date

p3



# Filtered Views – What are they?

| Chart of Accounts: All |                                       |             |             |               |                  |              |  |  |  |
|------------------------|---------------------------------------|-------------|-------------|---------------|------------------|--------------|--|--|--|
| Views                  |                                       |             |             |               |                  |              |  |  |  |
| No.                    | Name                                  | Net Change  | Balance     | Income/Ba...  | Account Category | Account Type |  |  |  |
| 74120                  | HICA Expense                          | -           | -           | Income Sta... | Expense          | Posting      |  |  |  |
| 74130                  | FUTA Expense                          | -           | -           | Income Sta... | Expense          | Posting      |  |  |  |
| 74140                  | Medicare Expense                      | -           | -           | Income Sta... | Expense          | Posting      |  |  |  |
| 74190                  | Other Federal Expense                 | -           | -           | Income Sta... | Expense          | Posting      |  |  |  |
| 74399                  | <b>Total, Federal Personnel Taxes</b> | -           | -           | Income Sta... | Expense          | End-Total    |  |  |  |
| 74400                  | <b>State Personnel Taxes</b>          | -           | -           | Income Sta... | Expense          | Begin-Total  |  |  |  |
| 74410                  | State Withholding Expense             | -           | -           | Income Sta... | Expense          | Posting      |  |  |  |
| 74420                  | SUTA Expense                          | -           | -           | Income Sta... | Expense          | Posting      |  |  |  |
| 91999                  | <b>Total, Misc. Expenses</b>          | -           | -           | Income Sta... | Expense          | End-Total    |  |  |  |
| 98990                  | <b>TOTAL EXPENSES</b>                 | 5,100.00    | 5,100.00    | Income Sta... | Expense          | End-Total    |  |  |  |
| 99999                  | <b>NET INCOME</b>                     | -429,277.36 | -586,438.20 | Income Sta... | Income           | Total        |  |  |  |

# Filtered Views – How do I find them?



Lists



# Filtered Views – When should I use them?

Drill into the data in Business Central

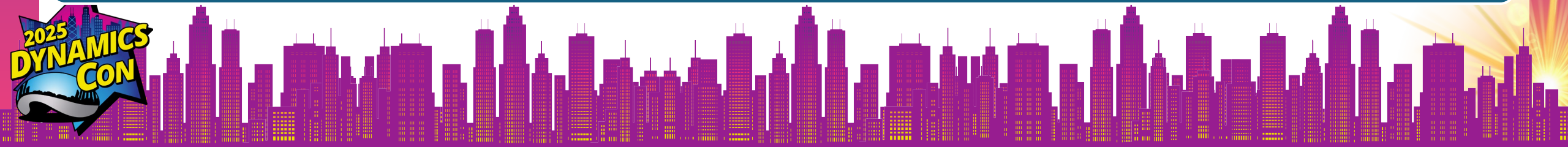
Dynamic/Real-time reports

Want to keep the data for later

Share with team to see the same data

Looking for fast statistics

Want to sort data



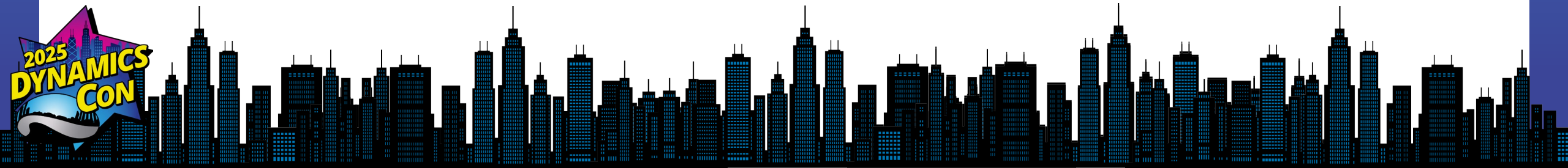
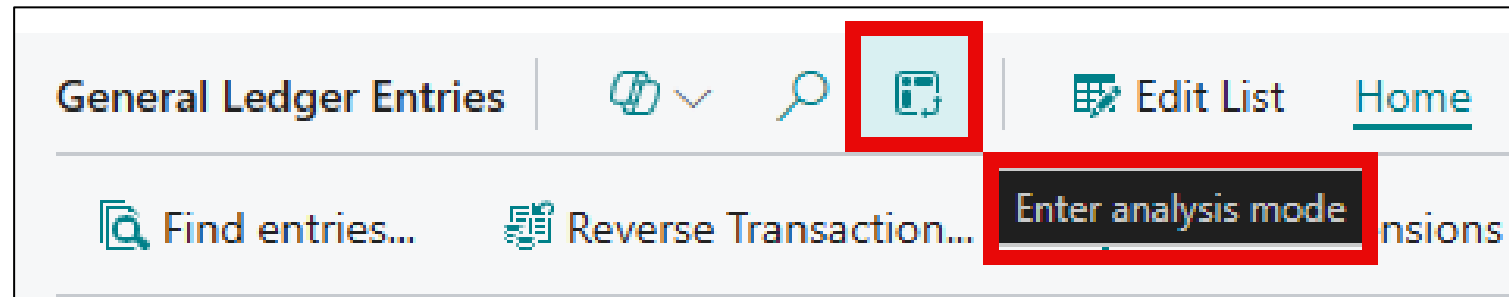
# Target Audience



# Data Analysis



# Data Analysis – What is it?





# Data Analysis – What is it?

Items

Items: All ▾ | ▾ | | | **I can rename this ▾** |

**Views**

All

Low stock Chairs, no Substitute

Filter list by...

Filter totals by...

| Item Category Code | Sum(Quantity on | Sum(Unit Cost) | Sum(Unit Price) |
|--------------------|-----------------|----------------|-----------------|
| DESK (1)           | 264.00          | 780.70         | 1,000.80        |
| CHAIR (10)         | 356.00          | 1,492.00       | 1,914.50        |
| TABLE (2)          | 315.00          | 843.60         | 1,081.40        |
| MISC (2)           | 18.00           | 1,132.70       | 1,452.20        |
| BEANS (19)         | 9,000.00        | 2,317.572      | 3,108.00        |
| EM_COMMER (1)      | 10.00           | 1,800.00       | 2,400.00        |
| SERVICES (2)       | 0.00            | 0.00           | 110.00          |
| PARTS (25)         | 1,900.00        | 324.93         | 0.00            |
| CM_CONSUM (2)      | 0.00            | 0.00           | 328.00          |
| CM_COMMER (3)      | 0.00            | 0.00           | 1,247.00        |
| (14)               | -137.00         | 3,730.00       | 36,124.00       |
|                    | 11,726.00       | 12,421.502     | 48,765.90       |

**Pivot Mode**

Search...

☐ No.

☐ Description

☐ Type

☒ Quantity on Hand

☒ Item Category Code

☐ Substitutes Exist

☐ Assembly BOM

☐ Production BOM No.

☐ Routing No.

☐ Base Unit of Measure

Row Groups

Item Category Code

Values

Sum(Quantity o...

Sum(Unit Cost)

Sum(Unit Price)

Column Labels

Drag here to set column labels

Rows: 81

Total Rows: 81

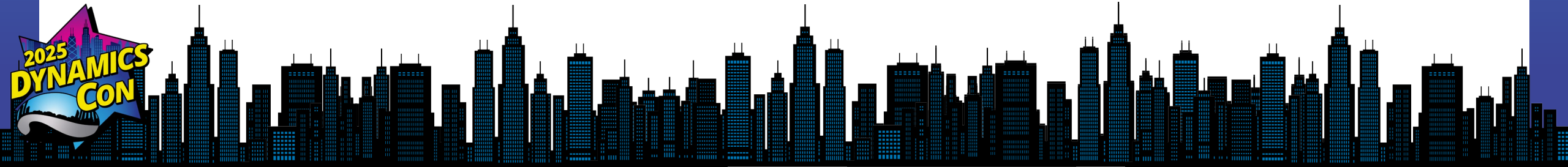
Filtered: 81

Create new analysis

# 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

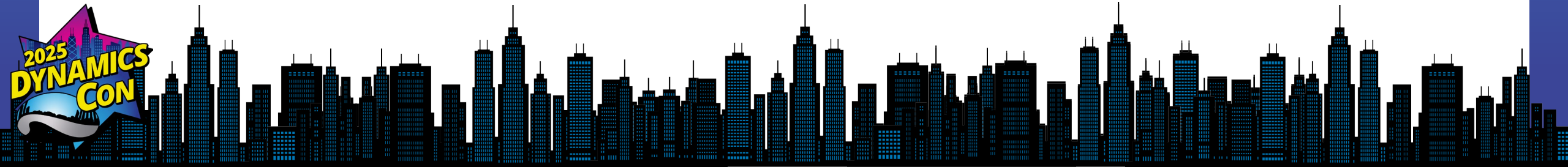


# Target Audience

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?

←

Income Statement Summarized (IS SUM)

🔍

Home

Hide options

Column

Period

Export to Excel/Print

Definitions

More options

Recalculate

Revert to defaults

Options

Name

IS SUM

...

Display Title

Income Statement Summarized

Row Definition

IS SUM

...

Column Definition

ISTREND

...

Negative Amount Format

Minus Sign

▼

View by

Month

▼

Date Filter

03/01/25..03/31/25

Show All Lines

☒

Default Excel Layout

...

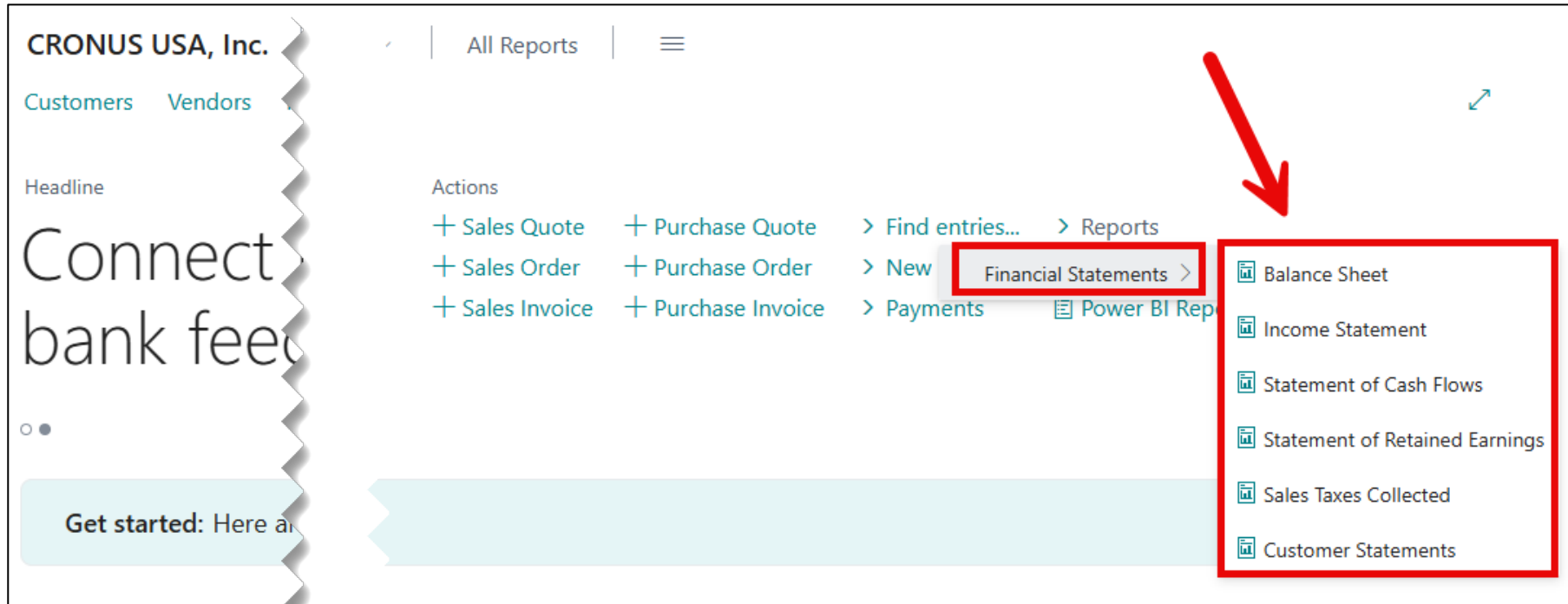
Internal Description

Dimensions >

| Row No. | Description                | January | February | March         | April | May | June | July | August | September | October | November |
|---------|----------------------------|---------|----------|---------------|-------|-----|------|------|--------|-----------|---------|----------|
| 2       | Cost of Goods              | –       | –        | 893.00        | –     | –   | –    | –    | –      | –         | –       | –        |
| 3       | <b>Gross Margin</b>        | –       | –        | <b>132.60</b> | –     | –   | –    | –    | –      | –         | –       | –        |
| 4       | <b>Gross Margin %</b>      | –       | –        | <b>-17.44</b> | –     | –   | –    | –    | –      | –         | –       | –        |
| 5       |                            | –       | –        | –             | –     | –   | –    | –    | –      | –         | –       | –        |
| 6       | Operating Expense          | –       | –        | –             | –     | –   | –    | –    | –      | –         | –       | –        |
| 7       | <b>Net (Income) / Loss</b> | –       | –        | <b>132.60</b> | –     | –   | –    | –    | –      | –         | –       | –        |
| 8       |                            | –       | –        | –             | –     | –   | –    | –    | –      | –         | –       | –        |
| 9       | Total of Income Statement  | –       | –        | 132.60        | –     | –   | –    | –    | –      | –         | –       | –        |
| 10      | ⋮ Check Figure             | –       | –        | –             | –     | –   | –    | –    | –      | –         | –       | –        |



# Financial Reports – How can I find them?



The screenshot shows the CRONUS USA, Inc. software interface. On the left, there's a sidebar with 'Customers' and 'Vendors' links, and a 'Headline' section with the text 'Connect bank fees'. The main area has a 'All Reports' tab and a menu with options: '+ Sales Quote', '+ Purchase Quote', '+ Sales Order', '+ Purchase Order', '+ Sales Invoice', '+ Purchase Invoice', '> Find entries...', '> New', '> Payments', '> Reports', and 'Power BI Rep'. The 'Financial Statements' option under '> Reports' is highlighted with a red box. A red arrow points to this box. A secondary red box highlights a list of financial reports: Balance Sheet, Income Statement, Statement of Cash Flows, Statement of Retained Earnings, Sales Taxes Collected, and Customer Statements.

CRONUS USA, Inc.

Customers Vendors

Headline

Connect bank fees

Get started: Here a

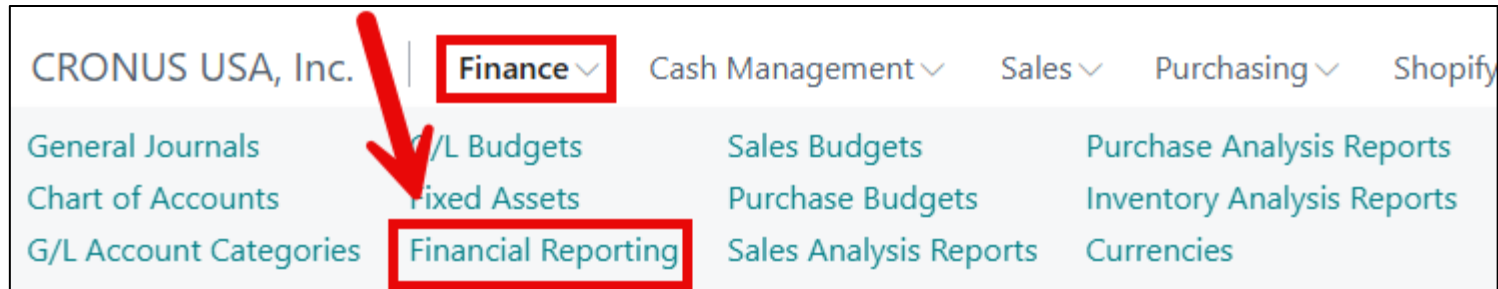
All Reports

Actions

- + Sales Quote
- + Purchase Quote
- + Sales Order
- + Purchase Order
- + Sales Invoice
- + Purchase Invoice
- > Find entries...
- > New
- > Payments
- > Reports
- Power BI Rep

Financial Statements >

- Balance Sheet
- Income Statement
- Statement of Cash Flows
- Statement of Retained Earnings
- Sales Taxes Collected
- Customer Statements



The screenshot shows the CRONUS USA, Inc. software interface. The 'Finance' menu is highlighted with a red box. A red arrow points to this box. The menu items are: General Journals, Chart of Accounts, G/L Account Categories, G/L Budgets, Fixed Assets, Financial Reporting, Sales Budgets, Purchase Budgets, Sales Analysis Reports, Purchase Analysis Reports, Inventory Analysis Reports, and Currencies.

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Shopify

- General Journals
- Chart of Accounts
- G/L Account Categories
- G/L Budgets
- Fixed Assets
- Financial Reporting
- Sales Budgets
- Purchase Budgets
- Sales Analysis Reports
- Purchase Analysis Reports
- Inventory Analysis Reports
- Currencies

# Financial Reports – When should I use them?

## View standard financial reports

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

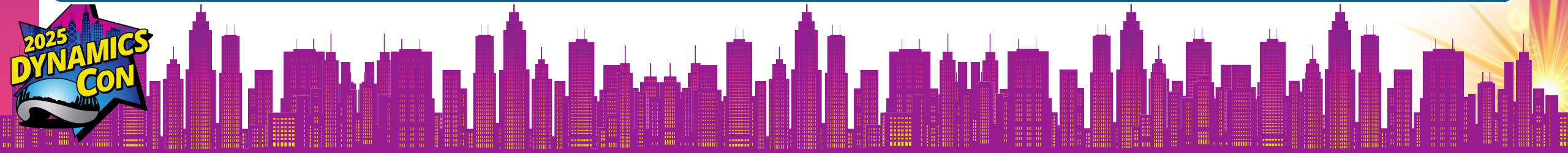
## Use dimensions in reporting

## Use filters in reporting

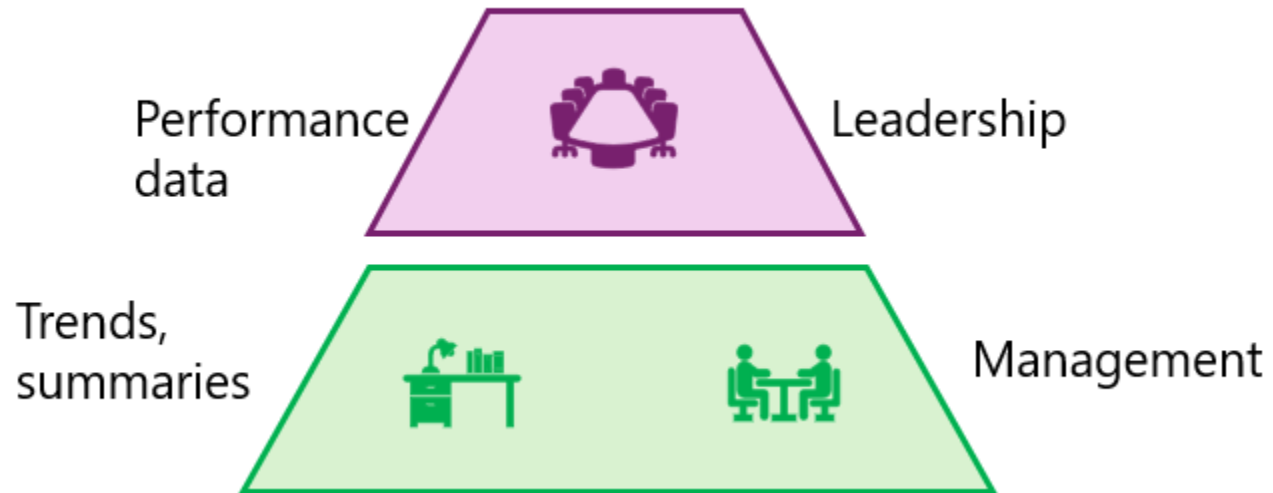
## Total/subtotal GL accounts

## 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

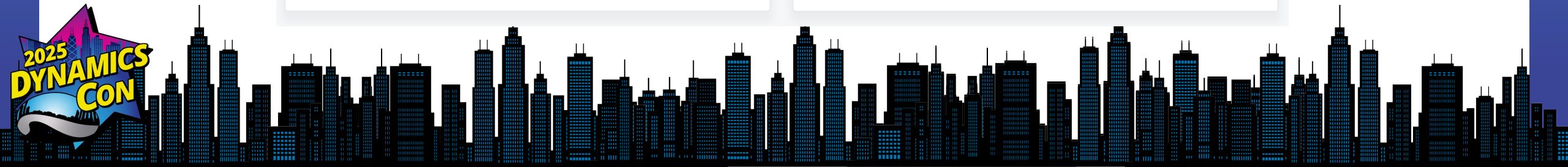
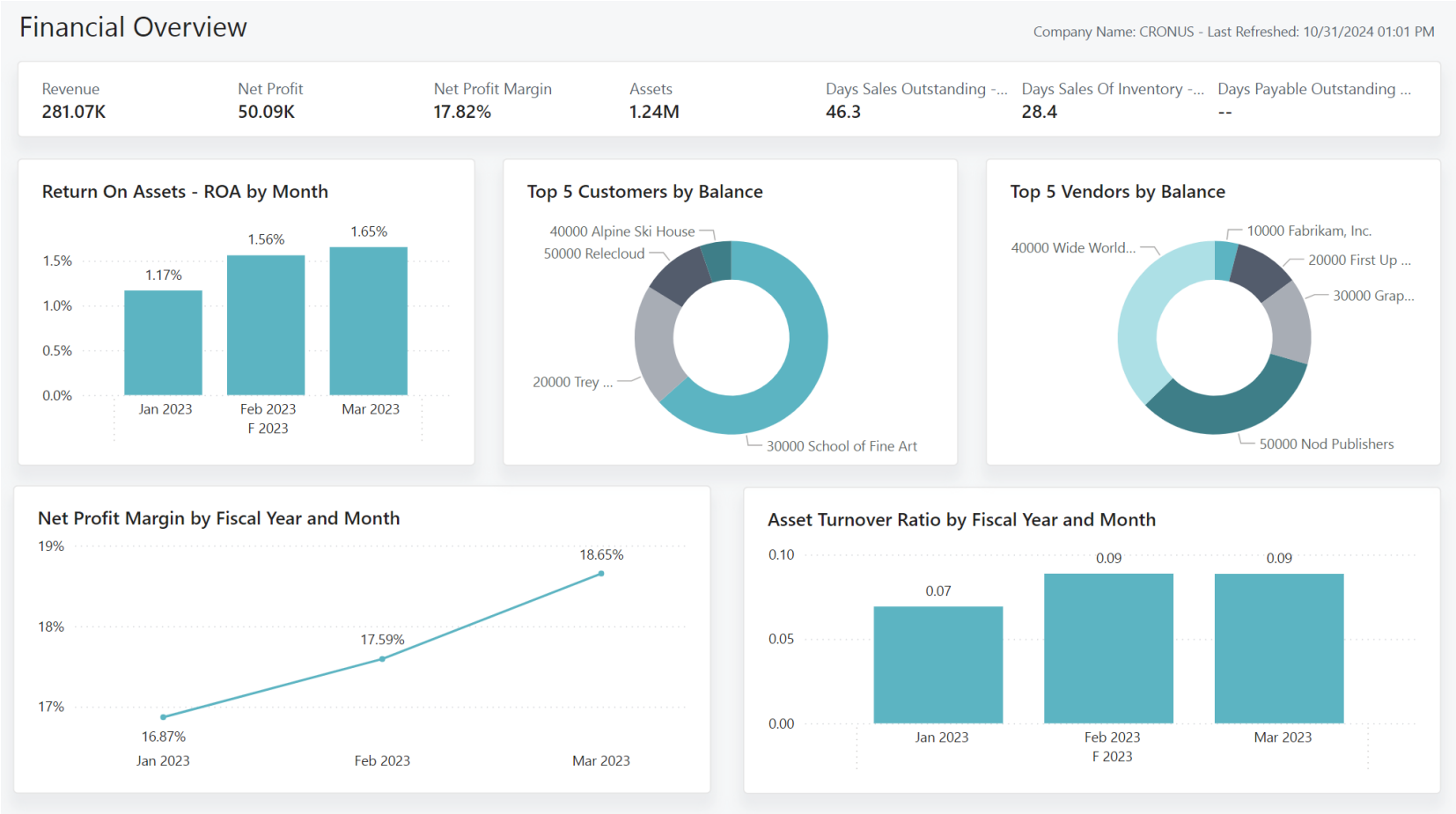
Merge data from different companies in BC

Can embed some in Business Central

<https://learn.microsoft.com/en-us/dynamics-365/business-central/admin-powerbi>



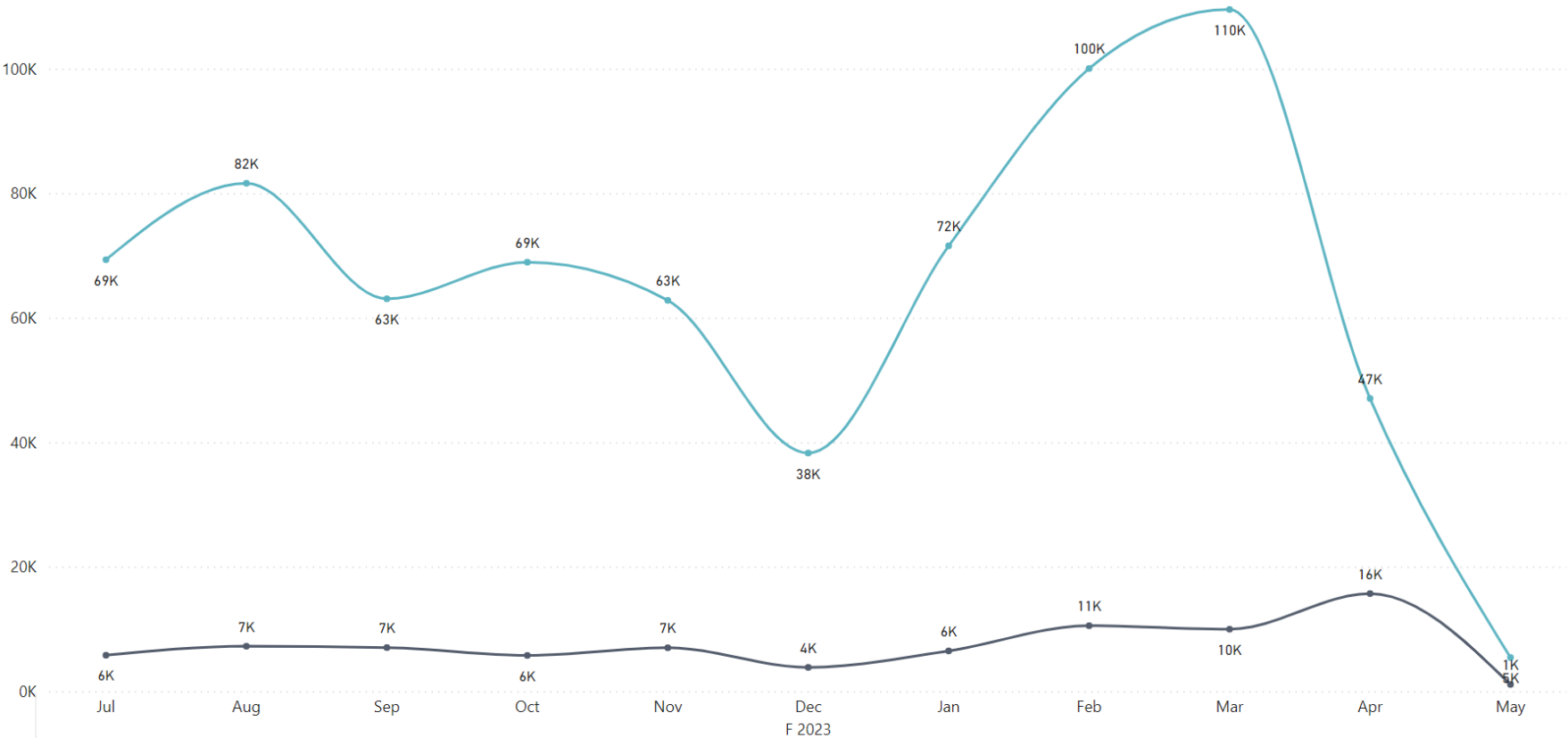
# Pre-Built Power BI Reports – What are they?





# Pre-Built Power BI Reports – What are they?

Sales Amount and Sales Amount Average 30 Days (Fiscal) by Fiscal Year




# Microsoft Documentation

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Business Central documentation

Welcome to Business Central

New and planned

> Get started

> Business functionality

> Analytics, business intelligence, and reporting

Analytics overview

Analytics by functional area

> KPIs, dashboards, and financial reports

Using key performance indicators (KPIs) to meet your business goals

> Power BI and Business Central

Power BI overview

Work with Power BI reports

Track KPIs with Power BI metrics

> Power BI apps for Business Central

Installing Power BI apps for Business Central

**Power BI apps/reports by functional area**

Power BI apps FAQ

Using Financial Reporting

> Ad-hoc data analysis

> Use reports in daily work

> Built-in reports

> Develop reports

Download PDF

Learn / Dynamics 365 / Business Central /

## Power BI apps/reports for functional areas

Article · 11/11/2024 · 3 contributors

Feedback

In this article

Reports in the Power BI Finance app

Reports in the Power BI Sales app

Reports in the Power BI Purchasing app

Reports in the Power BI Inventory app

Show 4 more

APPLIES TO:

Generally available in Business Central 2024 release wave 2 (version 25.1).

Power BI apps are available for the following functional areas in Business Central:

- Finance (14 reports)
- Sales (11 reports)
- Purchasing (12 reports)
- Inventory (11 reports)
- Inventory Valuation (3 reports)
- Projects (7 reports)
- Manufacturing (11 reports)

Expand table

| Functional area | Landing page         |
|-----------------|----------------------|
| Finance         | Power BI Finance app |
| Sales           | Power BI Sales app   |

Additional resources

Events

Join AI Skills Fest Challenge

Apr 8, 10 AM - May 28, 2 AM

Sharpen your AI skills and enter the sweepstakes to win a free Certification exam

Register now!

Training

Learning path

Use Power BI in Microsoft Dynamics 365 Business Central - Training

Are you going to use Power BI to create reports for Business Central? If so, this learning path will discuss how to build a dataset, build a report, and work with Power BI and Business...

Certification

Microsoft Certified: Power BI Data Analyst Associate - Certifications

Demonstrate methods and best practices that align with business and technical requirements for modeling, visualizing, and analyzing data with Microsoft Power BI.

Documentation

Understanding Assemble to Order and Assemble to Stock - Business Central

Learn about assembling items for sales orders or to keep in stock for future sales.

Working with Power BI reports in Business Central - Business

A graphic at the bottom of the page featuring a stylized city skyline with various skyscrapers in shades of blue and black. On the left side, there is a colorful, star-shaped logo with the text "2025 DYNAMICS CON" in bold, white and yellow letters.

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

**Power BI apps**

Install apps that provide actionable insights and drive business results

All apps   Organizational apps   **Template apps**

Filter by: All

Sort by: Popularity

business central

**Browse available apps from AppSource**

Save time by connecting your own data to a prebuilt report that you can personalize and share.

**Dynamics 365 Business Central – Sales**

★★★★★ (7)

This Power BI application provides sales information in an easy to read visual format

**Business Central Financials**

eKnowtion

★★★★★ (12)

**Dynamics 365 Business Central – Sales**

Microsoft

★★★★★ (24)

**Dynamics 365 Business Central – Sales**

Microsoft

★★★★★ (12)

**Dynamics 365 Business Central – Sales**

Microsoft

★★★★★ (2)

# 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>



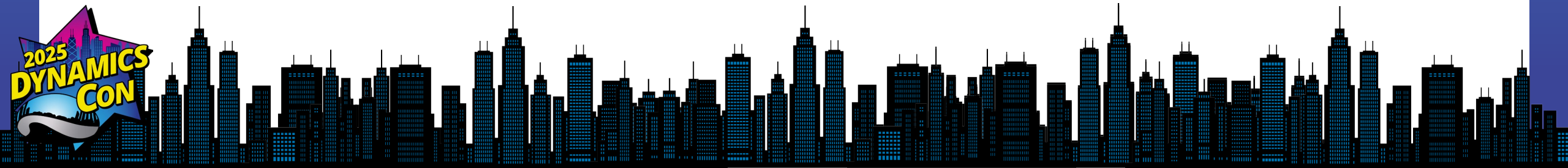
# Pre-Built Power BI Reports – When should I use them?

Visualize data or information

View information in a way that isn't available in Business Central

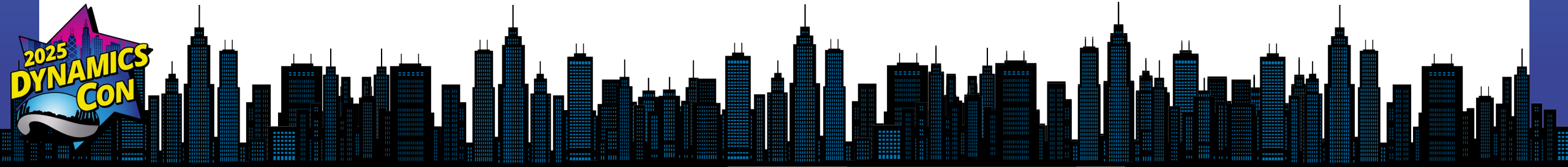
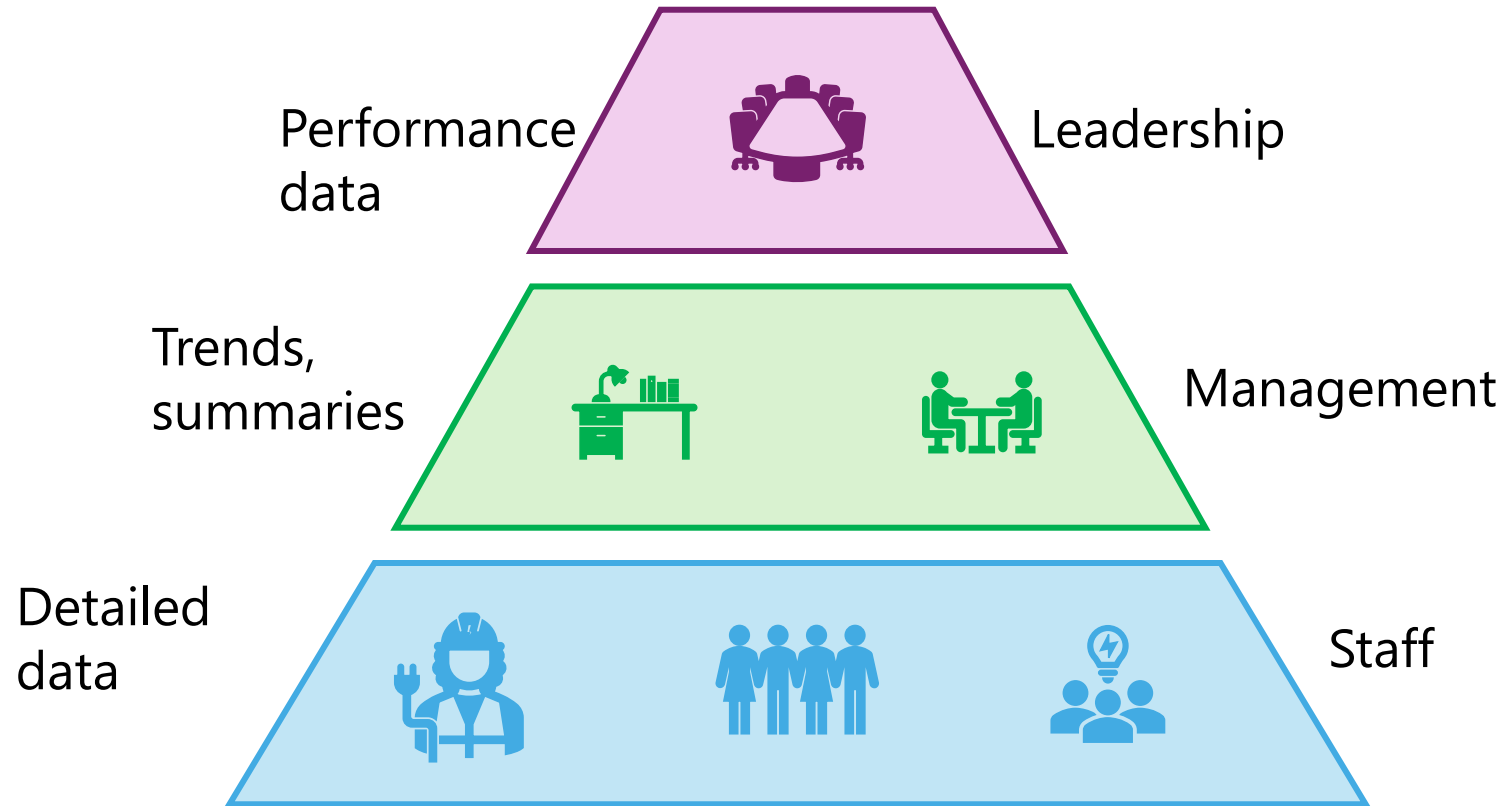
Other reports just aren't enough

Quick picture of what is going on





# Target Audience



# CoPilot





# CoPilot – What is it?



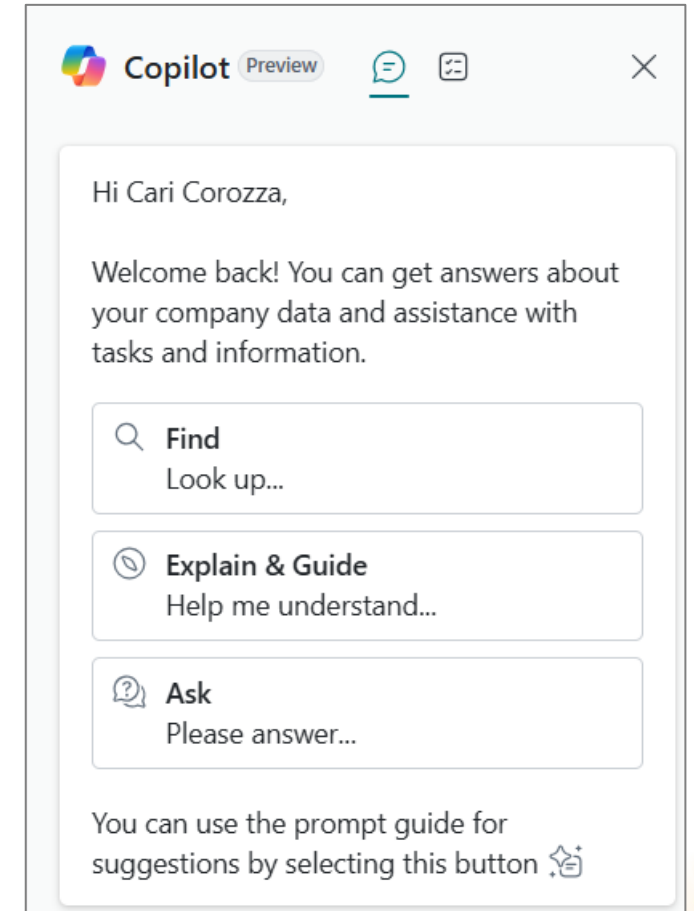
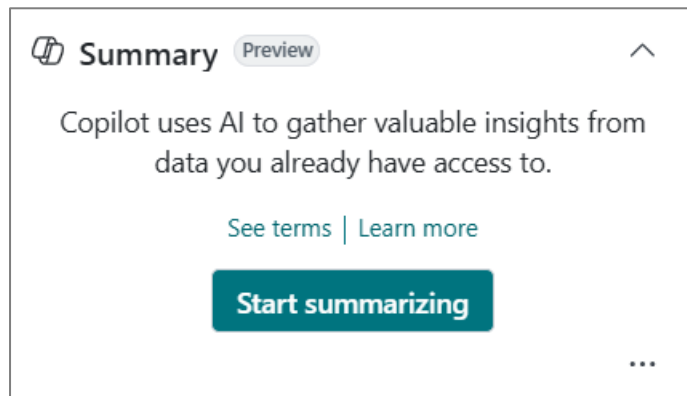
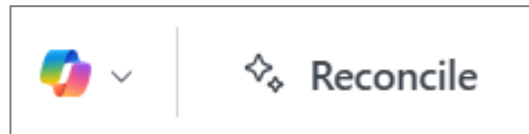
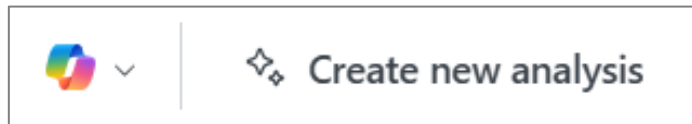
Microsoft's AI-powered assistant



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?

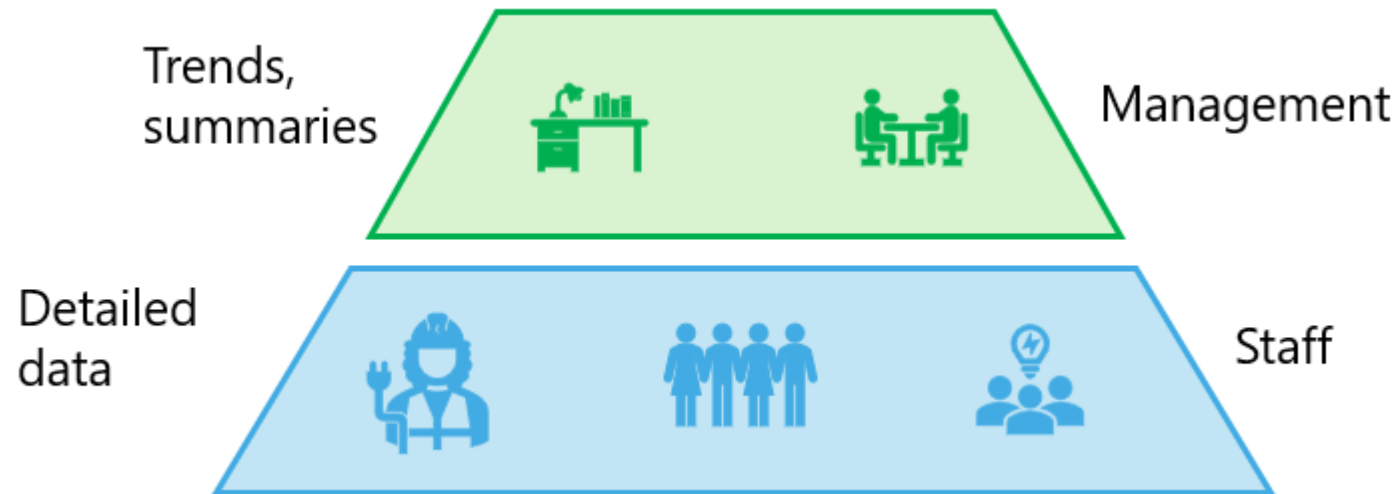
Want an overview or summary of a record

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

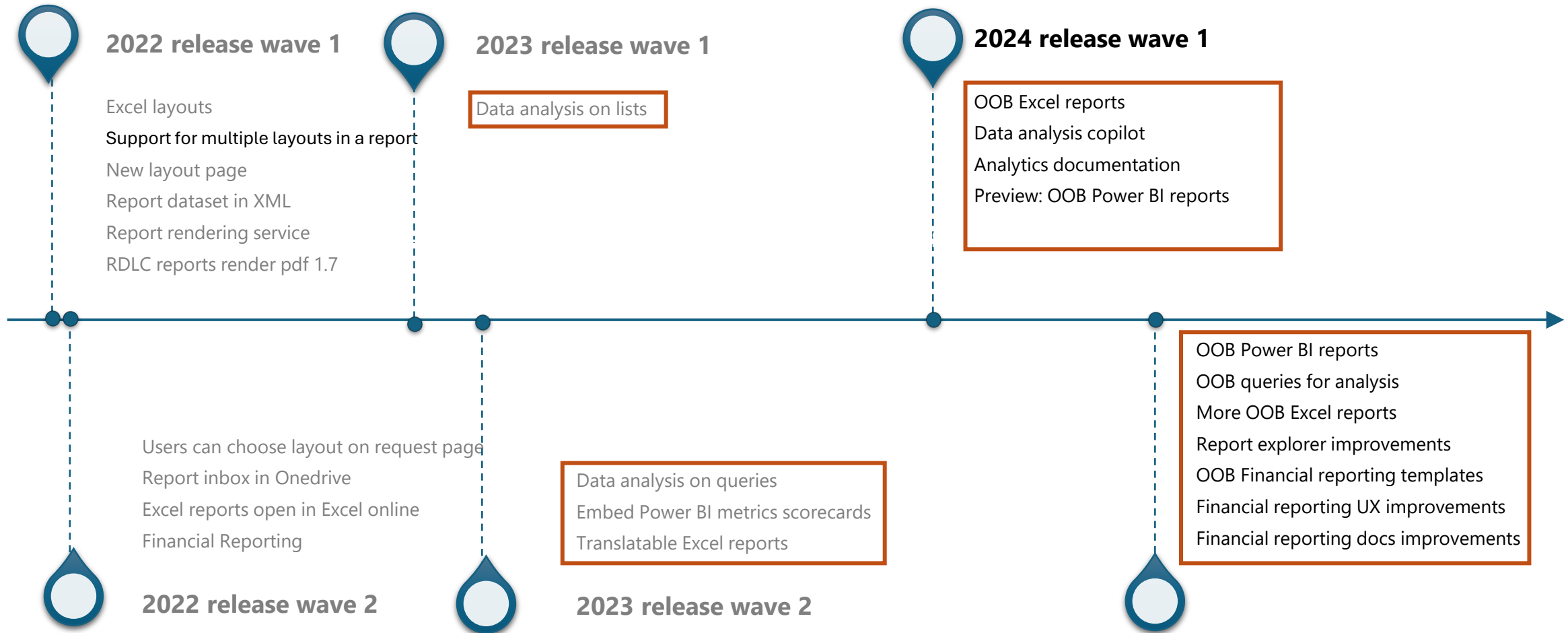
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# Reporting timeline

 = UX improvements

 = Self-service reporting and analytics







# 2025 DYNAMICS CON



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