



2026
DYNAMICS
CON
Vegas



Segment Roulette:

Don't Gamble with Your Chart—Go Dimensional!



Introduction

- Samantha Vislay
- Senior GP Support Consultant
- Work for Enavate



Who this presentation is for?



Companies currently using Microsoft Dynamics GP and considering a move to Business Central (BC).



Teams who want to understand how their existing GP framework translates into BC and why it isn't a one-to-one transition.



Users who have reviewed BC before and felt overwhelmed by dimensions or how they fit into reporting.



Agenda

Map GP to BC

- How to translate your existing GP chart of accounts into Business Central's structure

Establish Consistent Rules

- Best practices to avoid inconsistent setups that lead to unreliable reporting

Understand BC's Reporting Model

- How BC's dimensional structure influences reporting and analytics



Reframe your thinking

"The greatest danger in times of turbulence, is not the turbulence, it's acting with yesterday's logic"

~Peter Drucker



Understanding the Core Structures

Chart of Accounts



GP Chart of Accounts Structure

Segments drive both posting AND reporting

Every new combination creates a new GL account

Over time this creates large and rigid charts of accounts

Segment	Meaning
000	Revenue
1100	Department
00	Location



000-1100-00

BC Chart of Accounts Structure

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Journals | Cash Management | Cost Accounting | Fixed Assets | Posted Documents | All Reports

Chart of Accounts: All | + New | Delete | Edit List | Home | Account | Balance | Navigate | Report | More options

No.	Name	Net Change	Balance	Income/Balance	Account Category	Account Subcategory	Account Type
10000	ASSETS	–	–	Balance Sheet	Assets	Assets	Be
11000	Current Assets	–	–	Balance Sheet	Assets	Assets	Be
11100	Liquid Assets	–	–	Balance Sheet	Assets	Cash	Be
11200	Cash	306.64	306.64	Balance Sheet	Assets	Cash	Pc
11400	Bank, Checking	4,386.79	4,386.79	Balance Sheet	Assets	Cash	Pc
11500	Bank Currencies	9,941.88	9,941.88	Balance Sheet	Assets	Cash	Pc
11600	Bank Operations Cash	444,714.47	444,714.47	Balance Sheet	Assets	Cash	Pc
11700	Liquid Assets, Total	459,349.78	459,349.78	Balance Sheet	Assets	Cash	En
12000	Securities	–	–	Balance Sheet	Assets	Assets	Be
12100	Bonds	18,278.46	18,278.46	Balance Sheet	Assets	Assets	Pc
12200	Other Marketable Securities	–	–	Balance Sheet	Assets	Assets	Pc
12210	Increases during the Year	38,706.17	38,706.17	Balance Sheet	Assets	Assets	Pc
12300	Securities, Total	56,984.63	56,984.63	Balance Sheet	Assets	Assets	En
13000	Accounts Receivable	–	–	Balance Sheet	Assets	Accounts Receivable	Be
13100	Customers Domestic	946,042.71	946,042.71	Balance Sheet	Assets	Accounts Receivable	Pc
13200	Customers, Foreign	455,134.26	455,134.26	Balance Sheet	Assets	Accounts Receivable	Pc
13250	Customers, Intercompany	–	–	Balance Sheet	Assets	Accounts Receivable	Pc
13300	Accrued Interest	57,337.20	57,337.20	Balance Sheet	Assets	Accounts Receivable	Pc
13350	Other Receivables	3,129.30	3,129.30	Balance Sheet	Assets	Accounts Receivable	Pc

BC only has one account segment which is the main account

Comparison

GP	BC
000-1100-00	1100

Account Maintenance - TWO (sa)

Save Clear Delete File Print Tools Help Add Note

Account: 000 - 1100 - 00 Inactive

Description: Cash - Operating Account

Alias: \$0A Allow Account Entry

Category: Cash

Posting Type: Balance Sheet Profit and Loss

Level of Posting from Series:

Sales: Detail

Inventory Control: Detail

Purchasing: Detail

Payroll: Detail

Include in Lookup: Sales, Inventory Control, Purchasing, Payroll

Typical Balance: Debit Credit

User-Defined 1

User-Defined 2

User-Defined 3

User-Defined 4

Summary Budget Analysis Currency

by Account Type

Dynamics 365 Business Central

CRONUS USA, Inc. Finance Journals Cash Management Cost Accounting Fixed Assets Posted Documents All Reports

Chart of Accounts: All + New Delete Edit List Home Account Balance Navigate Report More options

No.	Name	Net Change	Balance	Income/Balance	Account Category	Account Subcategory	Account Type
10000	ASSETS	-	-	Balance Sheet	Assets	Assets	Be
11000	Current Assets	-	-	Balance Sheet	Assets	Assets	Be
11100	Liquid Assets	-	-	Balance Sheet	Assets	Cash	Be
11200	Cash	306.64	306.64	Balance Sheet	Assets	Cash	Po
11400	Bank, Checking	4,386.79	4,386.79	Balance Sheet	Assets	Cash	Po
11500	Bank Currencies	9,941.88	9,941.88	Balance Sheet	Assets	Cash	Po
11600	Bank Operations Cash	444,714.47	444,714.47	Balance Sheet	Assets	Cash	Po
11700	Liquid Assets, Total	459,349.78	459,349.78	Balance Sheet	Assets	Cash	En
12000	Securities	-	-	Balance Sheet	Assets	Assets	Be
12100	Bonds	18,278.46	18,278.46	Balance Sheet	Assets	Assets	Po
12200	Other Marketable Securities	-	-	Balance Sheet	Assets	Assets	Po
12210	Increases during the Year	38,706.17	38,706.17	Balance Sheet	Assets	Assets	Po
12300	Securities, Total	56,984.63	56,984.63	Balance Sheet	Assets	Assets	En
13000	Accounts Receivable	-	-	Balance Sheet	Assets	Accounts Receivable	Be
13100	Customers Domestic	946,042.71	946,042.71	Balance Sheet	Assets	Accounts Receivable	Po
13200	Customers, Foreign	455,134.26	455,134.26	Balance Sheet	Assets	Accounts Receivable	Po
13250	Customers, Intercompany	-	-	Balance Sheet	Assets	Accounts Receivable	Po
13300	Accrued Interest	57,337.20	57,337.20	Balance Sheet	Assets	Accounts Receivable	Po
13350	Other Receivables	3,129.30	3,129.30	Balance Sheet	Assets	Accounts Receivable	Po



Chart of Accounts Design Rules

1

Keep the chart of accounts simple

2

Avoid rebuilding GP segments in BC

3

Use dimensions for analysis



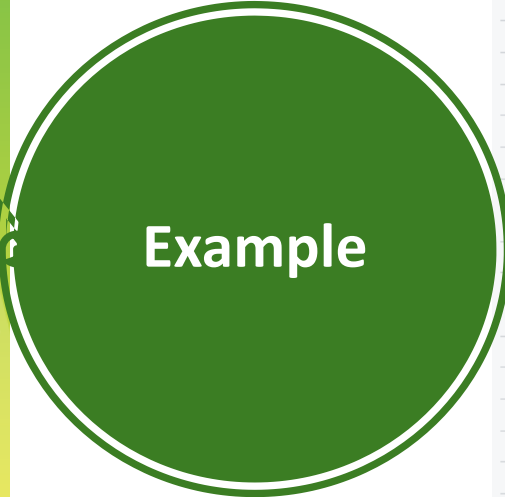
Designing your chart of accounts

Posting

Begin-Total

End-Total





No.	Name	Net Change	Balance	Income/Balance	Account Category	Account Subcategory	Account Type	Totaling	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Cost Type No.
10000	ASSETS	—	—	Balance Sheet	Assets	Assets	Begin-Total					
11000	Current Assets	—	—	Balance Sheet	Assets	Assets	Begin-Total					
11100	Liquid Assets	—	—	Balance Sheet	Assets	Cash	Begin-Total					
11200	Cash	306.64	306.64	Balance Sheet	Assets	Cash	Posting		Purchase			
11400	Bank, Checking	4,386.79	4,386.79	Balance Sheet	Assets	Cash	Posting					
11500	Bank Currencies	9,941.88	9,941.88	Balance Sheet	Assets	Cash	Posting					
11600	Bank Operations Cash	444,714.47	444,714.47	Balance Sheet	Assets	Cash	Posting					
11700	Liquid Assets, Total	459,349.78	459,349.78	Balance Sheet	Assets	Cash	End-Total	11100..11700				
12000	Securities	—	—	Balance Sheet	Assets	Assets	Begin-Total					
12100	Bonds	18,278.46	18,278.46	Balance Sheet	Assets	Assets	Posting					
12200	Other Marketable Securities	—	—	Balance Sheet	Assets	Assets	Posting					
12210	Increases during the Year	38,706.17	38,706.17	Balance Sheet	Assets	Assets	Posting		Purchase	DOMESTIC	MISC	
12300	Securities, Total	56,984.63	56,984.63	Balance Sheet	Assets	Assets	End-Total	12000..12300				
13000	Accounts Receivable	—	—	Balance Sheet	Assets	Accounts Receivable	Begin-Total					
13100	Customers Domestic	946,042.71	946,042.71	Balance Sheet	Assets	Accounts Receivable	Posting					
13200	Customers, Foreign	455,134.26	455,134.26	Balance Sheet	Assets	Accounts Receivable	Posting					
13250	Customers, Intercompany	—	—	Balance Sheet	Assets	Accounts Receivable	Posting					
13300	Accrued Interest	57,337.20	57,337.20	Balance Sheet	Assets	Accounts Receivable	Posting					
13350	Other Receivables	3,129.30	3,129.30	Balance Sheet	Assets	Accounts Receivable	Posting					
13400	Accounts Receivable, Total	1,461,643.47	1,461,643.47	Balance Sheet	Assets	Accounts Receivable	End-Total	13000..13400				
13500	Purchase Prepayments	—	—	Balance Sheet	Assets	Prepaid Expenses	Begin-Total					
13510	Vendor Prepayments Tax 0 %	—	—	Balance Sheet	Assets	Prepaid Expenses	Posting				NO TAX	
13520	Vendor Prepayments Tax 0 %	—	—	Balance Sheet	Assets	Prepaid Expenses	Posting				SERVICES	
13530	Vendor Prepayments Tax 0 %	—	—	Balance Sheet	Assets	Prepaid Expenses	Posting				RETAIL	
13540	Purchase Prepayments, Total	—	—	Balance Sheet	Assets	Prepaid Expenses	End-Total	13500..13540				
14000	Inventory	—	—	Balance Sheet	Assets	Inventory	Begin-Total					
14100	Resale Items	825,266.42	825,266.42	Balance Sheet	Assets	Inventory	Posting					
14101	Resale Items (Interim)	—	—	Balance Sheet	Assets	Inventory	Posting					
14102	Cost of Resale Sold (Interim)	—	—	Balance Sheet	Assets	Inventory	Posting					
14200	Finished Goods	191,756.50	191,756.50	Balance Sheet	Assets	Inventory	Posting					
14201	Finished Goods (Interim)	—	—	Balance Sheet	Assets	Inventory	Posting					
14300	Raw Materials	749,259.10	749,259.10	Balance Sheet	Assets	Inventory	Posting					



Understanding the Core Structures

Segments into Dimensions



Business Central Dimensions

Replace segmented account structures.

Add meaning beyond the chart of accounts as an attribute of a line item

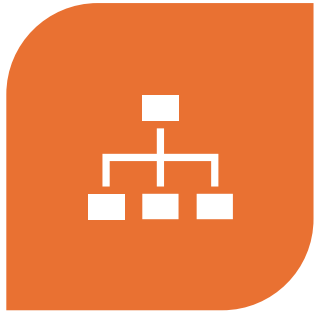
Offering 2 Global Dimensions and up to 6 additional Shortcut Dimensions.

Categorize transactions without adding accounts

Enable flexible reporting



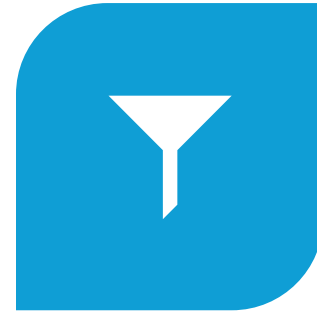
Global Dimensions



TWO DIMENSIONS
DESIGNATED AS “GLOBAL”



STORED DIRECTLY ON
EVERY LEDGER ENTRY



AVAILABLE IN FILTERS,
REPORTS, AND VIEWS



DESIGNED FOR THE MOST
FREQUENTLY USED
CATEGORIES



Shortcut Dimensions

Up to 6 additional Shortcut Dimensions available

Reporting needs are more detailed

Not stored directly on ledger tables

Used across transactions and journals on subset of data

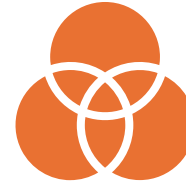


Grey area for classification

- Sales region can possibly be for Global or shortcut
- It can depend on how your Subledgers flow
- Best practice is not to use all 8

Question	Likely Choice
Will this be used in almost every transaction?	Global Dimension
Is it critical for financial reporting?	Global Dimension
Is it used only by specific teams or processes?	Shortcut Dimension
Could the list of values grow significantly over time?	Shortcut Dimension

Dimension Best Practices



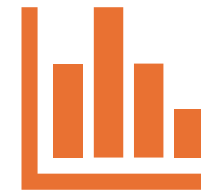
Standardized Dimension Values
Use a consistent set of approved values.



Required Dimensions
Ensure key dimensions are mandatory where needed.



Clear Naming & Governance
Maintain consistent naming and usage rules.



Reliable Reporting Structure
Well-managed dimensions produce accurate reporting.



Demo

The screenshot displays the Dynamics 365 Business Central user interface for the company 'CRONUS USA, Inc.'. The top navigation bar includes various functional areas such as Finance, Journals, Cash Management, Cost Accounting, Fixed Assets, Posted Documents, and All Reports. Below the navigation, a 'Get started' banner offers a guided tour with the text 'Hi, ready to set up your business?' and a 'Get started' button. The main dashboard is divided into several sections: 'Email Status' with three cards for 'Failed Emails in Outbox', 'Draft Emails in Outbox', and 'Sent Emails Last 30 Days', all showing a count of 0; 'Self-Service' with a 'Current Time Sheet' card and a grid of 'Time Sheets' cards for 'New Time Sheets', 'Time Sheets in progress', 'Submitted Time Sheets', 'Rejected Time Sheets', and 'Approved Time Sheets', all showing 0; 'Activities' with three cards for 'Overdue Purchase Documents' (7), 'Cash Accounts Balance' (\$459,350), and 'New Incoming Documents' (1); and a bottom row of 'Payments', 'Document Approvals', 'Financials', 'Incoming Documents', and 'Product Videos' cards, each with a count or status indicator.



Understanding the Core Structures

Account Maintenance into Posting Groups



What are posting groups?

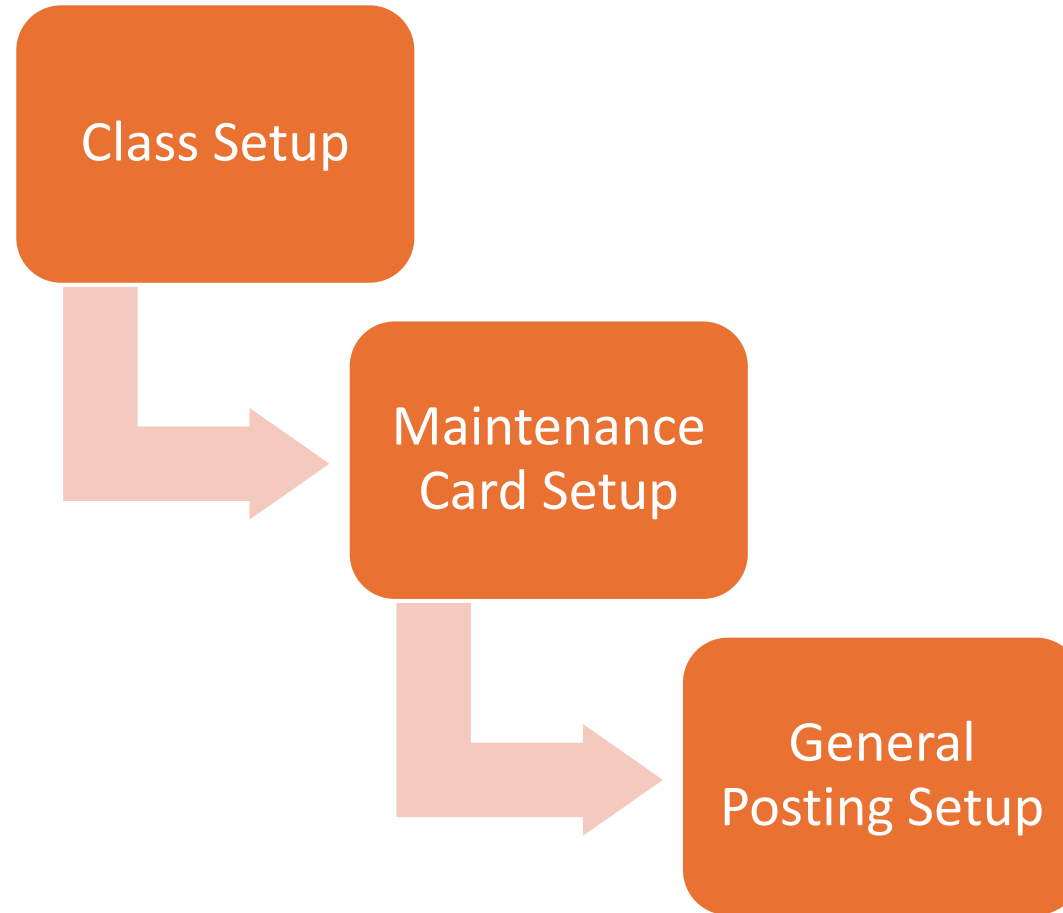
Automate G/L
Posting

Connect
Subledgers to the
G/L

Ensure
Consistent
Financial Entries



Dynamics GP Posting Accounts



BC Posting Group Types

General
Business
Posting
Group



General
Product
Posting
Group



General
Posting
Setup

Identifies **WHO** you are doing business with (customer or vendor category).

Identifies **WHAT** is being sold or purchased (item, service, or resource category).

Combines the Business and Product groups to determine which G/L accounts are used for revenue, COGS, and purchases.



General Business Posting Group



Gen. Business Posting Groups | Work Date: 1/22/2026

✓ Saved



+ New

Edit List

Delete

Setup



Code ↑	Description	Def. VAT Bus. Posting Group	Auto Insert Default
→ DOMESTIC	Domestic customers and vendors		<input checked="" type="checkbox"/>
EU	Customers and vendors in EU		<input checked="" type="checkbox"/>
EXPORT	Other customers and vendors (not EU)		<input checked="" type="checkbox"/>
INTERCOMP	Intercompany		<input checked="" type="checkbox"/>

General Product Posting Group

General Product Posting Groups | Work Date: 1/22/2026

✓ Saved



🔍 📄 + New Edit List Delete Setup



Code ↑	Description	Def. VAT Prod. Posting Group	Auto Insert Default
→ MANUFACT	Capacities		<input checked="" type="checkbox"/>
MISC	Miscellaneous with tax		<input checked="" type="checkbox"/>
NO TAX	Miscellaneous without tax		<input checked="" type="checkbox"/>
RAW MAT	Raw Materials		<input checked="" type="checkbox"/>
RETAIL	Retail		<input checked="" type="checkbox"/>
SERVICES	Resources, etc.		<input checked="" type="checkbox"/>



General Posting Setup

Dynamics 365 Business Central

General Posting Setup | Work Date: 1/22/2026

Show All Accounts

Gen. Bus. Posting Group ↑	Gen. Prod. Posting Group ↑	Description	View All Acc... on	Sales Account	Sales Credit Memo Account	Sales Line Disc. Account	Sales Inv. Disc. Account	Sales Pmt. Disc. Debit Acc.	Sales Pmt. Disc. Credit Acc.	Sales Prepayments Account	Purch. Account	Purch. Credit Memo Account	Purch. Line Disc. Account	Purch. Inv. Disc. Account	Purch. Pmt. Disc. Debit Acc.	Purch. Pmt. Disc. Credit Acc.	Purch. Prepayments Account	COGS Account	COGS Account (Interim)	Inventory Adjmt. Account	Inv. Accrual Acc. (Interim)	Direct Cost Applied Account	Over Appli. Acco	
		MANUFACT	<input type="checkbox"/>	*							*							*					\$2450	\$247
		MISC	<input type="checkbox"/>	*							*							\$4700	14102	\$4500	22550	\$4710	\$477	
		NO TAX	<input type="checkbox"/>	*							*							\$4700	14102	\$4500	22550	\$4710	\$477	
		RAW MAT	<input type="checkbox"/>	*							*							\$3600	14302	\$3400	22530	\$3700	\$387	
		RETAIL	<input type="checkbox"/>	*							*							\$4700	14102	\$4500	22550	\$4710	\$477	
		SERVICES	<input type="checkbox"/>	*							*							\$4700	14102	\$4500	22550	\$2450	\$247	
DOMESTIC		MANUFACT	<input type="checkbox"/>		44100	44100	45200				54100	54100	54400	54400				*					\$2450	\$247
DOMESTIC		MISC	<input type="checkbox"/>		44100	44100	45200			22160	54100	54100	54400	54400			13510	\$4700	14102	\$4500	22550	\$4710	\$477	
DOMESTIC		NO TAX	<input type="checkbox"/>		44100	44100	45200			22160	54100	54100	54400	54400			13510	\$4700	14102	\$4500	22550	\$4710	\$477	
DOMESTIC		RAW MAT	<input type="checkbox"/>		43100	43100	45200			22160	53100	53100	53300	53300			13510	\$3600	14302	\$3400	22530	\$3700	\$387	
DOMESTIC		RETAIL	<input type="checkbox"/>		44100	44100	45200			22160	54100	54100	54400	54400			13510	\$4700	14102	\$4500	22550	\$4710	\$477	
DOMESTIC		SERVICES	<input type="checkbox"/>		42100	42100	45200			22160	54100	54100	54400	54400			13510	\$4700	14102	\$4500	22550	\$2450	\$247	
EU		MANUFACT	<input type="checkbox"/>		44200	44200	45200				54200	54200	54400	54400				*					\$2450	\$247
EU		MISC	<input type="checkbox"/>		44200	44200	45200				54200	54200	54400	54400				\$4700	14102	\$4500	22550	\$4710	\$477	
EU		NO TAX	<input type="checkbox"/>		44200	44200	45200				54200	54200	54400	54400				\$4700	14102	\$4500	22550	\$4710	\$477	
EU		RAW MAT	<input type="checkbox"/>		43200	43200	45200				53150	53150	53300	53300				\$3600	14302	\$3400	22530	\$3700	\$387	
EU		RETAIL	<input type="checkbox"/>		44200	44200	45200				54200	54200	54400	54400				\$4700	14102	\$4500	22550	\$4710	\$477	
EU		SERVICES	<input type="checkbox"/>		42200	42200	45200				54200	54200	54400	54400				\$4700	14102	\$4500	22550	\$2450	\$247	
EXPORT		MANUFACT	<input type="checkbox"/>		44300	44300	45200				54300	54300	54400	54400				*					\$2450	\$247
EXPORT		MISC	<input type="checkbox"/>		44300	44300	45200				54300	54300	54400	54400				\$4700	14102	\$4500	22550	\$4710	\$477	
EXPORT		NO TAX	<input type="checkbox"/>		44300	44300	45200				54300	54300	54400	54400				\$4700	14102	\$4500	22550	\$4710	\$477	
EXPORT		RAW MAT	<input type="checkbox"/>		43300	43300	45200				53200	53200	53300	53300				\$3600	14302	\$3400	22530	\$3700	\$387	
EXPORT		RETAIL	<input type="checkbox"/>		44300	44300	45200				54300	54300	54400	54400				\$4700	14102	\$4500	22550	\$4710	\$477	
EXPORT		SERVICES	<input type="checkbox"/>		42300	42300	45200				54300	54300	54400	54400				\$4700	14102	\$4500	22550	\$2450	\$247	
INTERCOMP		MISC	<input type="checkbox"/>		44200	44200	45200				54200	54200	54400	54400				\$4700	14102	\$4500	22550			
INTERCOMP		NO TAX	<input type="checkbox"/>		44200	44200	45200				54200	54200	54400	54400				\$4700	14102	\$4500	22550			
INTERCOMP		RAW MAT	<input type="checkbox"/>		44200	44200	45200				54200	54200	53300	53300				\$3600	14302	\$3400	22530			
INTERCOMP		RETAIL	<input type="checkbox"/>		44200	44200	45200				54200	54200	54400	54400				\$4700	14102	\$4500	22550			



Demo

Dynamics 365 Business Central

CRONUS USA, Inc. | Finance | Journals | Cash Management | Cost Accounting | Fixed Assets | Posted Documents | All Reports |

Bank Accounts | Customers | Vendors | Incoming Documents | Purchase Invoices | Budgets | Intrastat Reports | General Posting Setup

Get started

Hi, ready to set up your business?

We've prepared a few activities to get you and your team quickly started.

Get started

Email Status

Email Activities

Failed Emails in Outbox 0	Draft Emails in Outbox 0	Stale Emails Last 30 Days 0
------------------------------	-----------------------------	--------------------------------

Self-Service

Current Time Sheet

Time Sheets

New Time Sheets 0	Time Sheets in progress 0
----------------------	------------------------------

Pending Time Sheets

Submitted Time Sheets 0	Rejected Time Sheets 0	Approved Time Sheets 0
----------------------------	---------------------------	---------------------------

Activities

Overdue Purchase Documents 7	Cash Accounts Balance \$459,350	New Incoming Documents 1
---------------------------------	------------------------------------	-----------------------------

Payments

Purchase Documents Due Today 7	Purchase Invoices Due Next Week 1	Purchase Documents Due Next Week 0
-----------------------------------	--------------------------------------	---------------------------------------

Document Approvals

POs Pending Approval 0	SOs Pending Approval 0
---------------------------	---------------------------

Financials

Unprocessed Payments 0

Incoming Documents

Approved Incoming Documents 0	OCR Completed 0
----------------------------------	--------------------

Product Videos

▶



Specific Posting Groups

Customer Posting Groups

Vendor Posting Groups

Inventory Posting Groups

Bank Account Posting Groups

Fixed Assets Posting Groups



Tax Posting Groups

Tax Business Posting Groups

Tax Product Posting Groups

Tax Posting Setup



Understanding the Core Structures

BC Reporting



BC Built In Report Options

Financial Reports (Financial Statements)

Row/column definitions
for flexible layouts

Custom financial
reporting

(Income Statements,
Balance Sheet, Statement
of Cash Flow)

Built-in Reports (Operational Reports)

Aged
Receivables/Payables

Trial Balance

Customer/Vendor reports

Data Analysis (SmartList Alternative)

List views that filter, sort,
group, totals

Ad-hoc analysis directly
in lists

Power BI

KPI Dashboards

Interactive analytics

BC reporting combines built-in financials, flexible analysis, and extensible BI tools.

Example Scenario: Department Reporting

Management wants to analyze **expenses by department**.

The company has two departments:

Department	Dimension Value
Sales	SALES
Operations	OPS

Transactions:

Account	Amount	Department
Travel Expense	\$2,000	SALES
Travel Expense	\$1,200	OPS
Office Supplies	\$800	SALES



Example Scenario: Department Reporting

Report Output:

Department	Total Expenses
SALES	\$2,800
OPS	\$1,200



Example of Poor Dimension Usage

Now assume inconsistent setup occurs:

Account	Amount	Department
Travel Expense	\$2,000	SALES
Travel Expense	\$1,200	Ops
Office Supplies	\$800	(blank)
Travel Expense	\$500	Sales Dept

Report Output:

Department	Total Expenses
SALES	\$2,000
Ops	\$1,200
Sales Dept	\$500
(Unassigned)	\$800

Final Takeaways

- Don't recreate your GP chart of accounts in BC
- Use dimensions for analysis, not accounts
- This is not a one-to-one translation.
Review your business workflows
- Establish governance rules early
- A well-structured system leads to better reporting and analytics



Resources

- Dimensions: <https://learn.microsoft.com/en-us/training/modules/dimensions-dynamics-365-business-central/>
- Posting Groups: <https://learn.microsoft.com/en-us/training/modules/posting-groups-dynamics-365-business-central/>

Slides



Linkedin



Feedback Is Appreciated



Segment Roulette: Don't Gamble with Your Chart—Go Dimensional!

- Before we wrap up, I'd really value any feedback you may have.
- Examples:
 - Areas that could be clearer?
 - What didn't work and what worked?

2026 DYNAMICS CON

