



What's new with in-app reporting and data analysis

Tom Bevan

Nick Harper

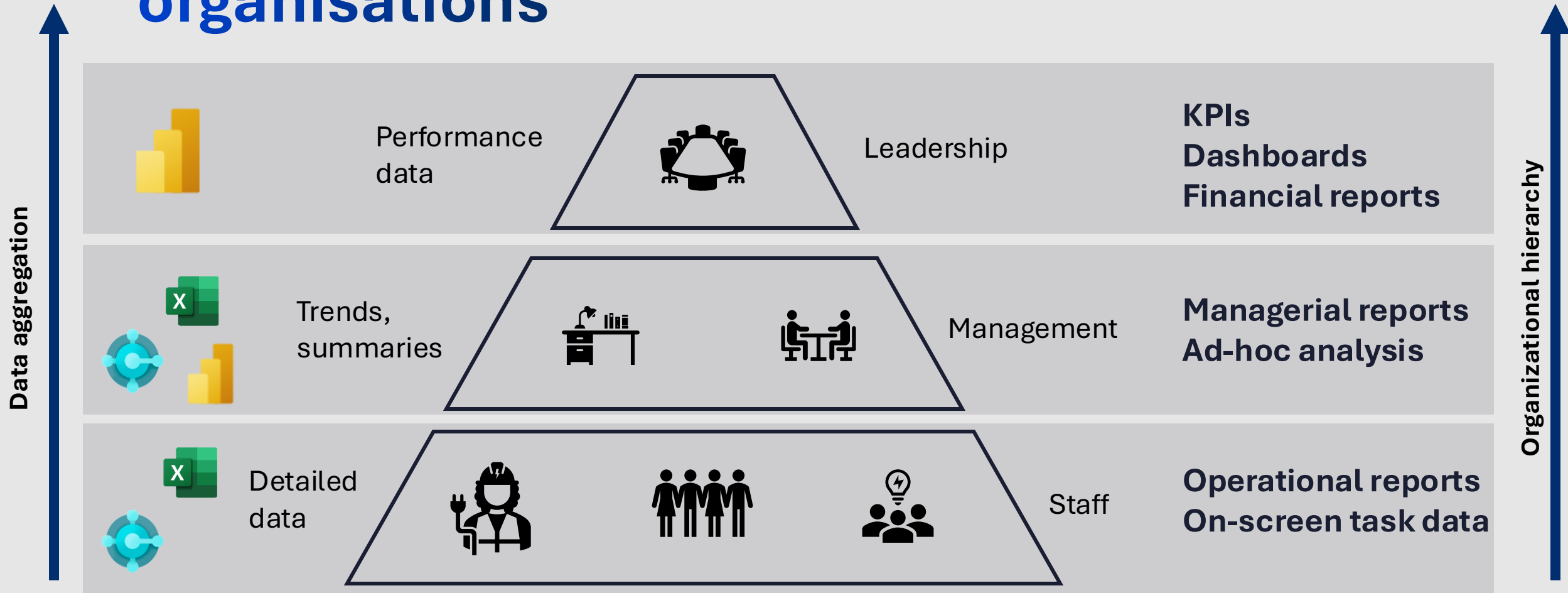
Reporting in BC means three things

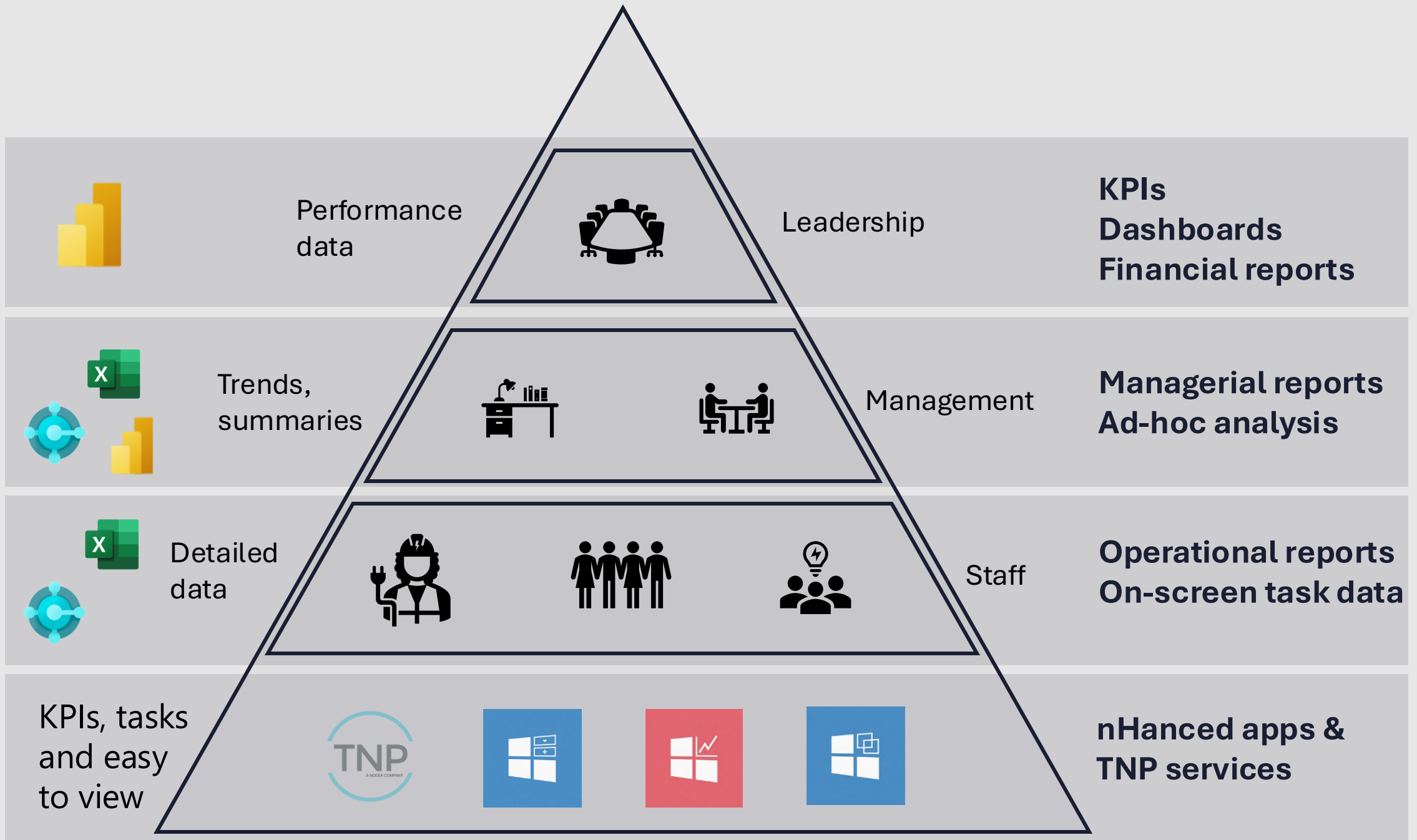
- Analytical Reports
- Processing only (AL process)
- Printable Documents (eg Invoices)

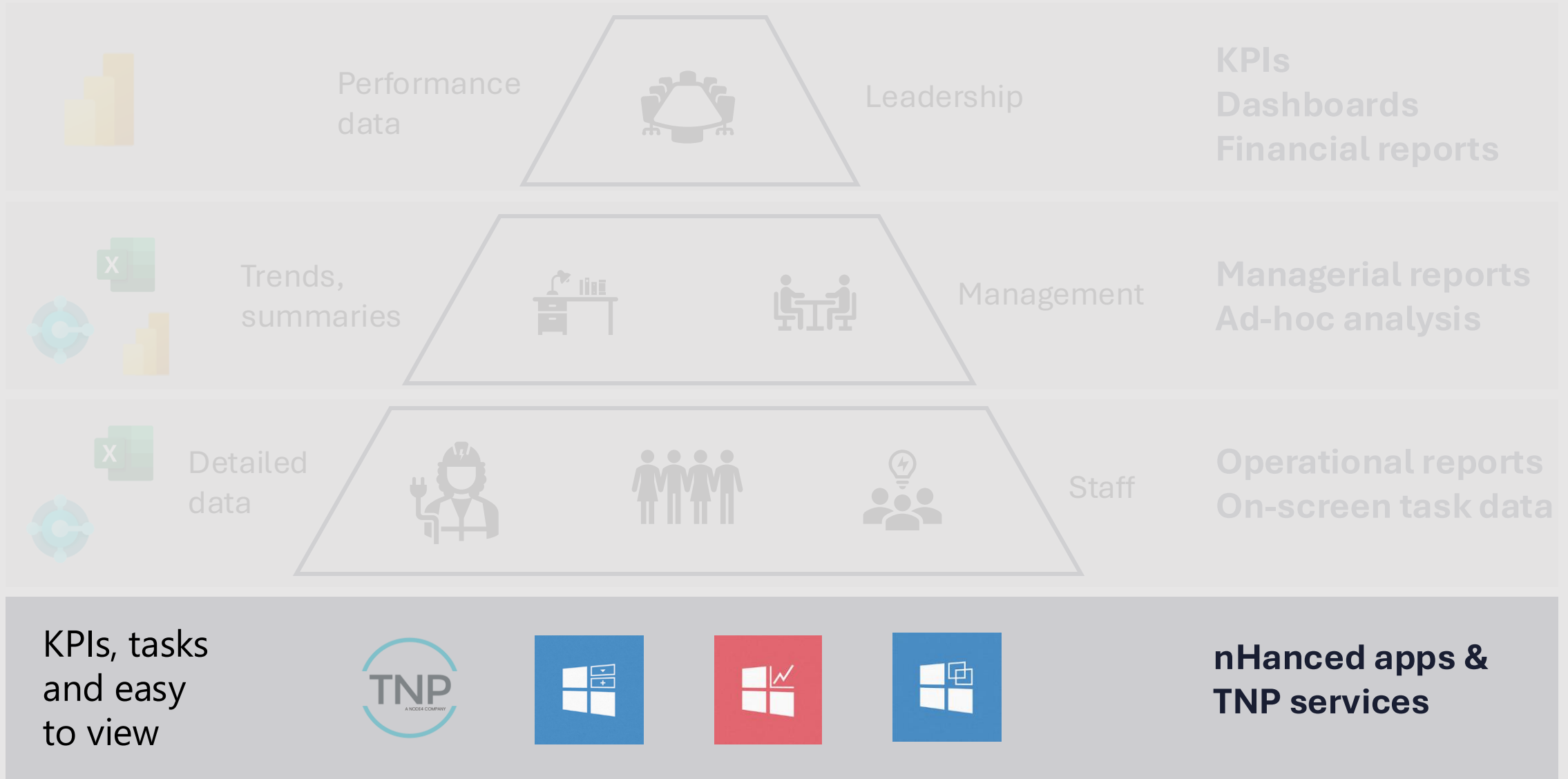
Reporting in BC means three things

- Analytical Reports
- Processing only (AL process)
- Printable Documents (eg Invoices)

Typical analytics needs in organisations



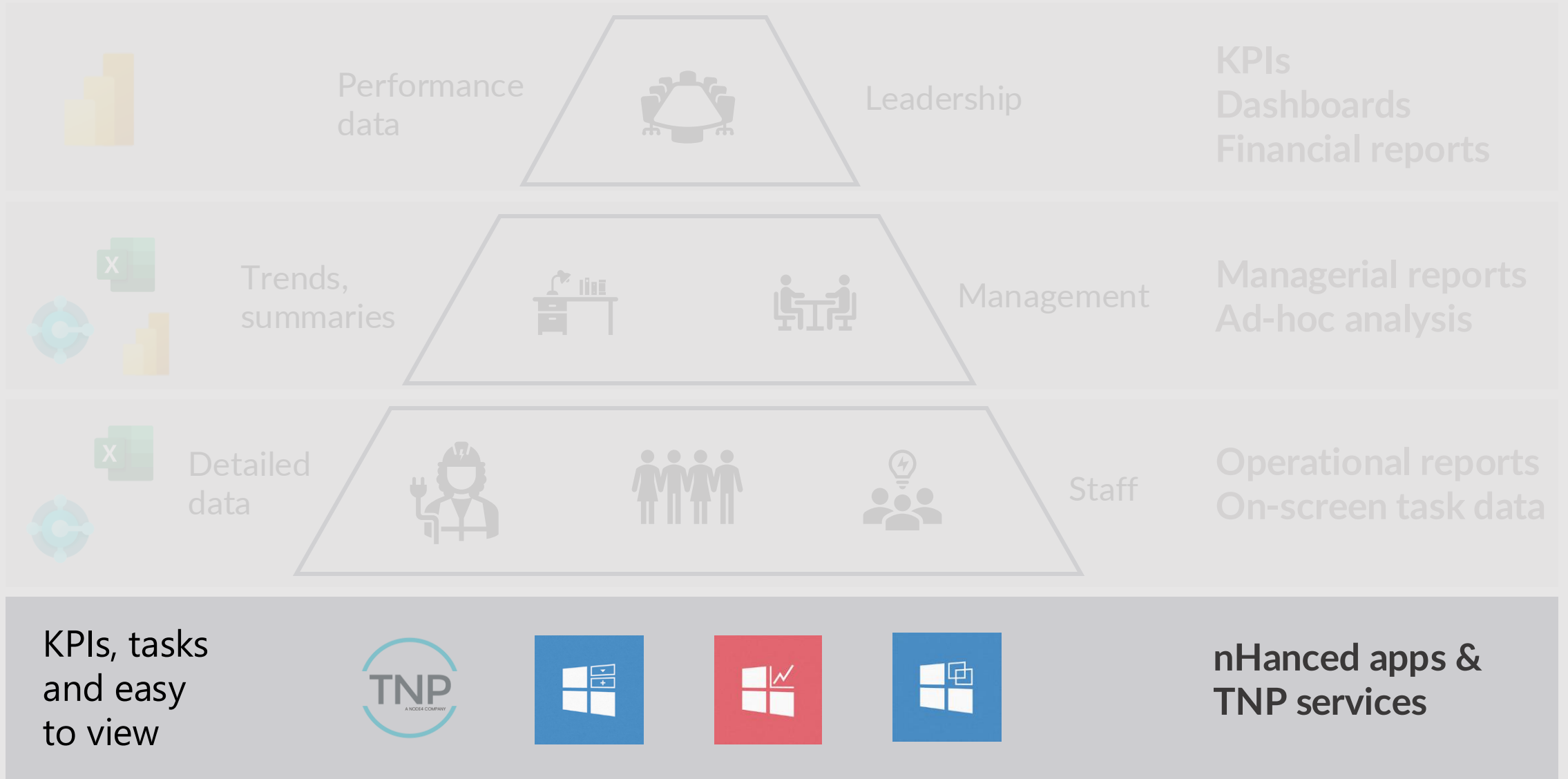


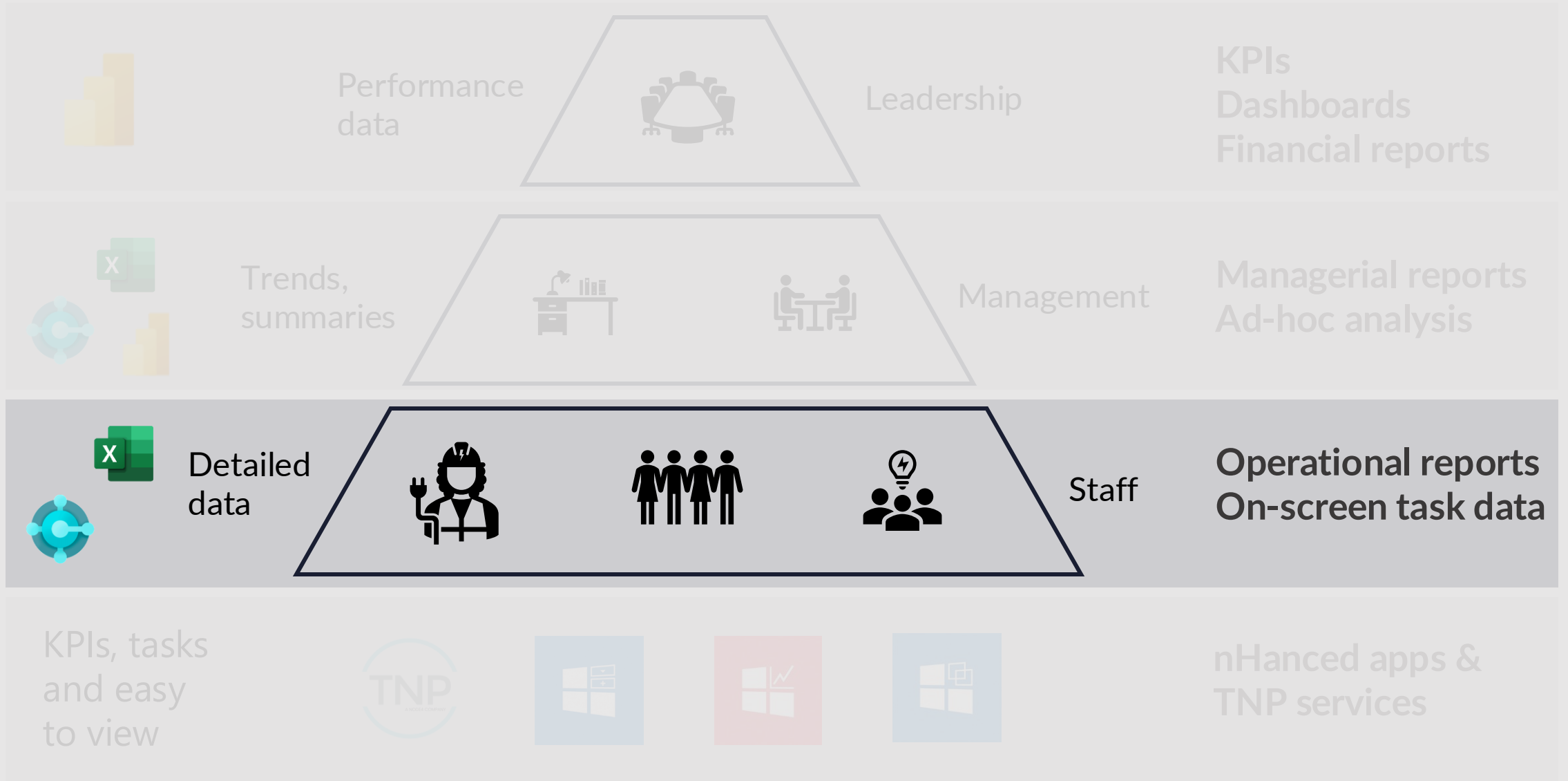


#01

Our stuff first 😊

nHanced Reporting tools





#2

Operational reports on-screen task data

Microsoft's vision

**All analytics &
reporting is
designed for online
consumption
(not print)**

- Consume data: Core business scenarios have **out-of-the-box reporting/analytics**
- Enable: Most user analytics needs covered with **nocode/lowcode solutions**
- Enable: Customers have **easy access to data** – for advanced BI and analytics

 Filter by title


- 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
- > Ad-hoc data analysis
- > Use reports in daily work
- > Built-in reports
- > Develop reports
- > Analyze data in business intelligence tools
- > Security, privacy, and compliance
- > Development and administration
- > Copilot and agent capabilities
- > Responsible AI

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Analytics, business intelligence, and reporting overview

Article • 12/23/2024 • 6 contributors

 [Feedback](#)

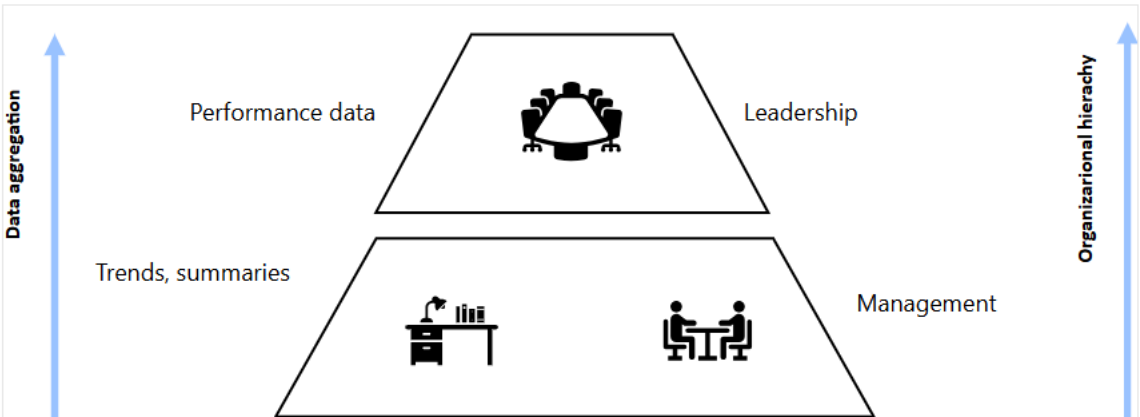
In this article

- [Analytics needs in organizations](#)
- [Using Financial Reports to produce financial statements and KPIs](#)
- [Using key performance indicators to meet your business goals](#)
- [Built-in Power BI apps](#)
- [Show 5 more](#)

Small and mid-sized companies rely on built-in analytics and reporting capabilities they can use out-of-the-box to help keep track of their business. Business Central provides reports and analytics tools that cover basic and complex business processes.

Analytics needs in organizations

When you think about analytics in your organization, it might help to use a persona-based model to outline different needs.



Additional resources

Events

[Join AI Skills Fest Challenge](#)

Apr 8, 4 PM - May 28, 8 AM

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

[Register now!](#)

Training

Module

[Work with Analytics and Reporting in Finance and Operations apps - Training](#)

Empower business users to make important decisions by using analytics and reporting in finance and operations apps.

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

[Create a project sales invoice to invoice a project - Business Central](#)

Describes how to invoice customers for project expenses as a project progresses and costs accumulate.

[Create a project card for a project and specify tasks - Business Central](#)

For a new project, you create a project card that contains project tasks and planning lines, to help you manage progress and budgets.

[Power BI apps/reports for functional areas - Business Central](#)

Get an overview of the landing pages for the Power BI apps available in functional areas in Business Central.

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Additional resources

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The old way run
a report get a pdf

Aged Accounts Receivable

CRONUS Danmark A/S

Aged as of January 31, 2022

Aged by Due Date

All Amounts in LCY

2/9/2023 11:51 AM

Page 1 / 3

ADMIN

						Aged Overdue Amounts				
Posting Date	Document Type	Document No.	Due Date	Original Amount	Balance	Not Due	01/01/22 ..01/31/22	12/01/21 ..12/31/21	11/01/21 ..11/30/21	Before 11/01/21
10000 - Kontorcentralen A/S				Phone No.:		Contact: Robert Townes				
01/20/22	Invoice	103199	02/20/22	11,868.75	11,868.75	11,868.75	0.00	0.00	0.00	0.00
01/21/22	Invoice	103200	02/21/22	9,742.50	9,742.50	9,742.50	0.00	0.00	0.00	0.00
01/22/22	Invoice	103201	02/22/22	17,861.25	17,861.25	17,861.25	0.00	0.00	0.00	0.00
01/27/22	Invoice	103202	02/27/22	1,747.50	1,747.50	1,747.50	0.00	0.00	0.00	0.00
Total for Kontorcentralen A/S					41,220.00	41,220.00	0.00	0.00	0.00	0.00
20000 - Ravel Møbler				Phone No.:		Contact: Helen Ray				
01/29/22	Invoice	103169	02/12/22	5,355.00	5,355.00	5,355.00	0.00	0.00	0.00	0.00
01/23/22	Invoice	103205	02/06/22	4,747.50	4,747.50	4,747.50	0.00	0.00	0.00	0.00
01/28/22	Invoice	103206	02/11/22	32,475.00	32,475.00	32,475.00	0.00	0.00	0.00	0.00
01/28/22	Invoice	103207	02/11/22	6,495.00	6,495.00	6,495.00	0.00	0.00	0.00	0.00
Total for Ravel Møbler					49,072.50	49,072.50	0.00	0.00	0.00	0.00
30000 - Lauritzen Kontormøbler A/S				Phone No.:		Contact: Meagan Bond				
01/30/22	Invoice	103170	01/31/22	74,240.00	74,240.00	0.00	74,240.00	0.00	0.00	0.00
01/19/22	Invoice	103211	01/31/22	6,495.00	6,495.00	0.00	6,495.00	0.00	0.00	0.00

The new way Self-service data analysis in BC

Customer Ledger Entries

Search ☒ Analyze Aged Accounts Receivables by customer Q1 Aged Accounts Receivables ☐ + Refresh data

Customer Name / Due Date Year / Due Date Quarter / Due Date Month ↓↑	Sum(Remaining Amount)
> Customer 2 (4)	8.00
> Relecloud (9)	8,836.80
> Alpine Ski House (7)	4,316.92
▼ School of Fine Art (22)	
▼ 2023 (22)	
▼ Q2 (1)	
April (1)	2,039.85
Sub Total Q2	2,039.85
▼ Q1 (21)	
March (5)	19,944.69
February (7)	20,409.93
January (9)	11,439.05
Sub Total Q1	51,793.67
Sub Total 2023	53,833.52
Sub Total School of Fine Art	53,833.52
> Trey Research (23)	3,036.60

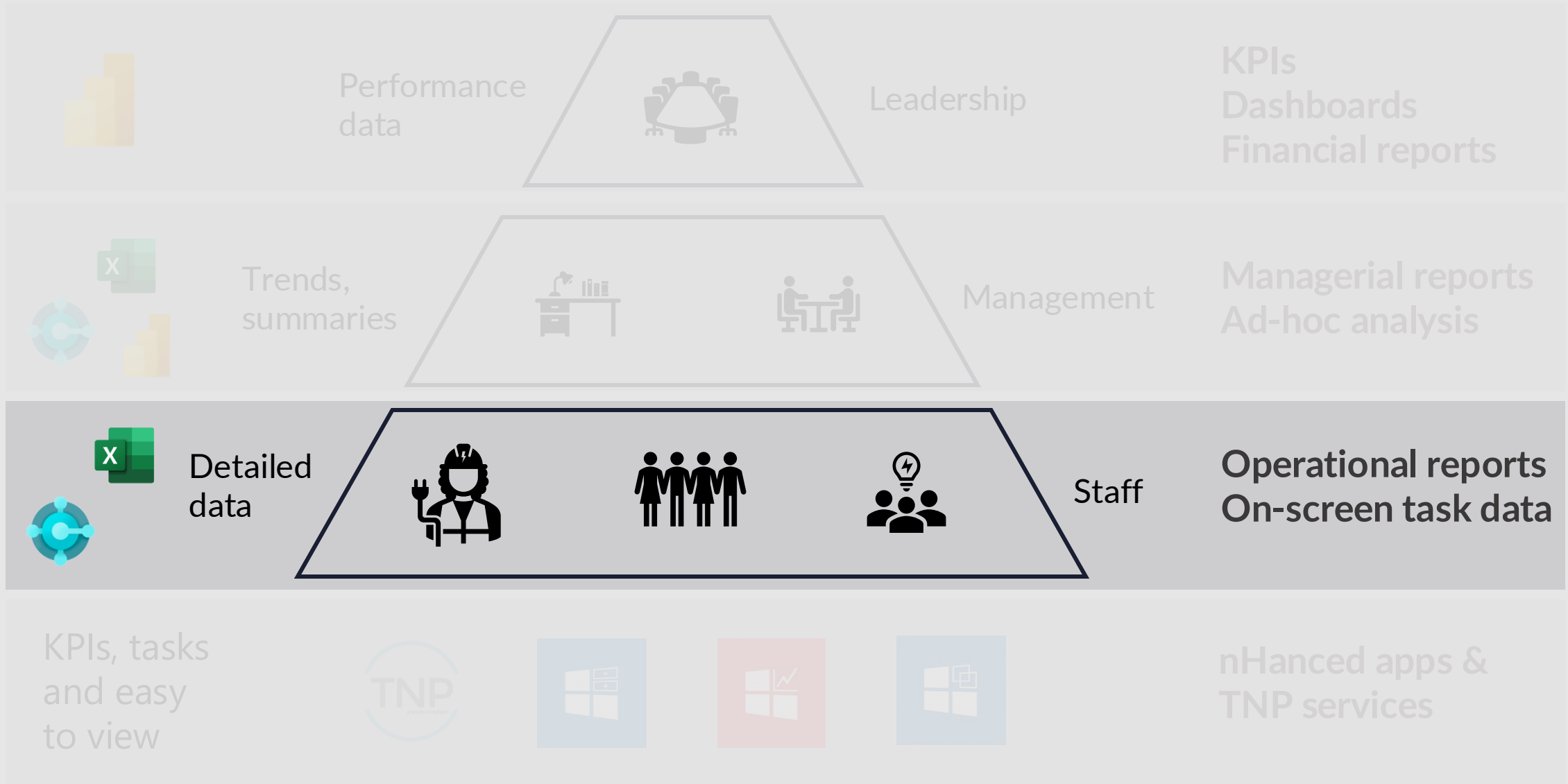
Row: 65 of 410 Total Rows: 410 Filtered: 65

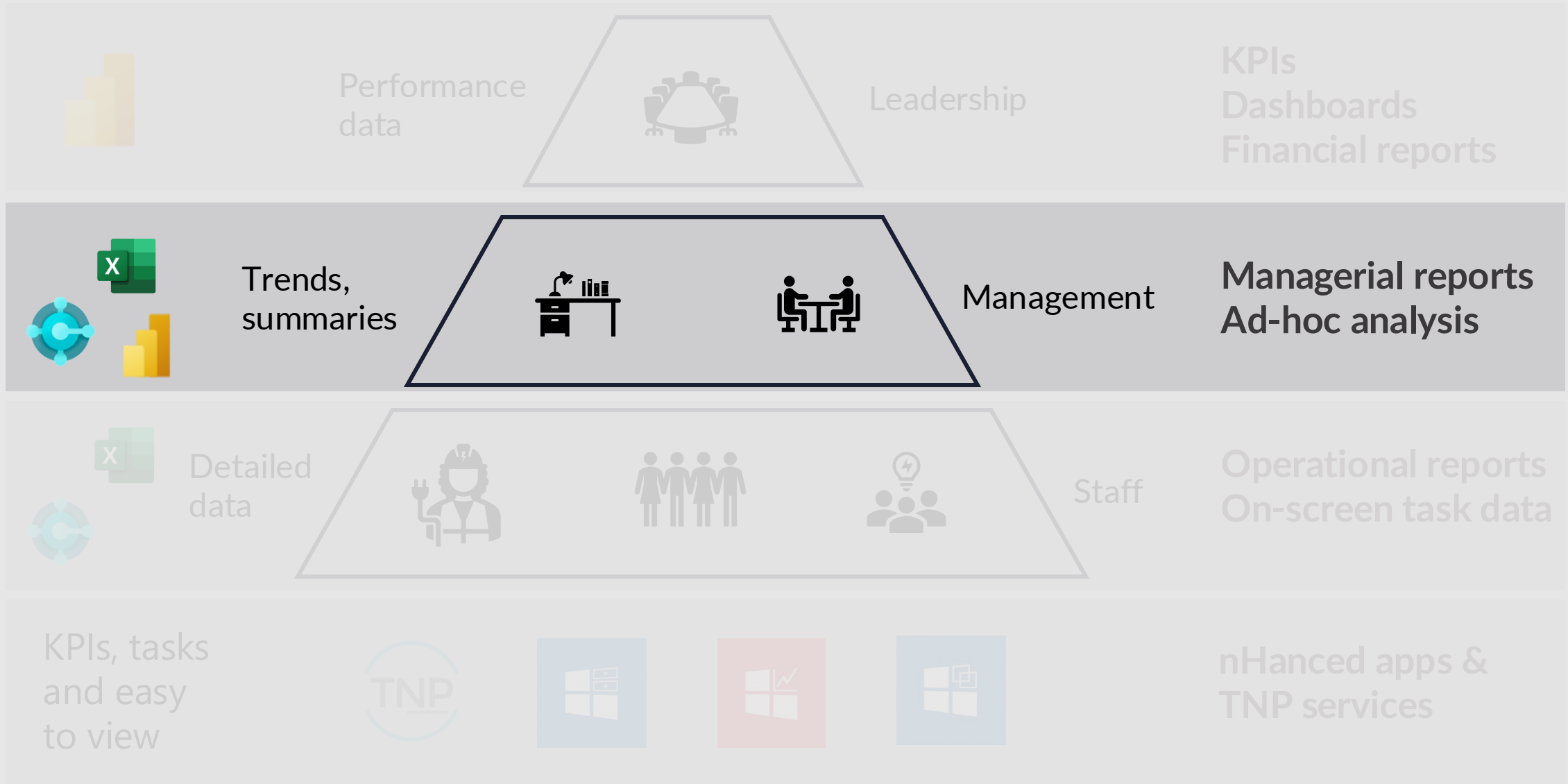
#3 Analysis mode demo

This is very nice 😊

Coming soon...

- V26.2 – Additional fields from related tables





There are already
loads of reports

Insight from last week

The biggest sales order was for £15,000

Actions

- + Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote
- + Purchase Order

+ Purchase Invoice

> Panels Selection

> Find entries...
- > New

> Payments

> Reports

> Graphical Scheduler
- Excel Reports

○ ○ ○ ○ ● ○ ○ ○ ○ ○

Insights

Department

General

Purchases

Sales

Finances

Activities

CRM

Warehouse

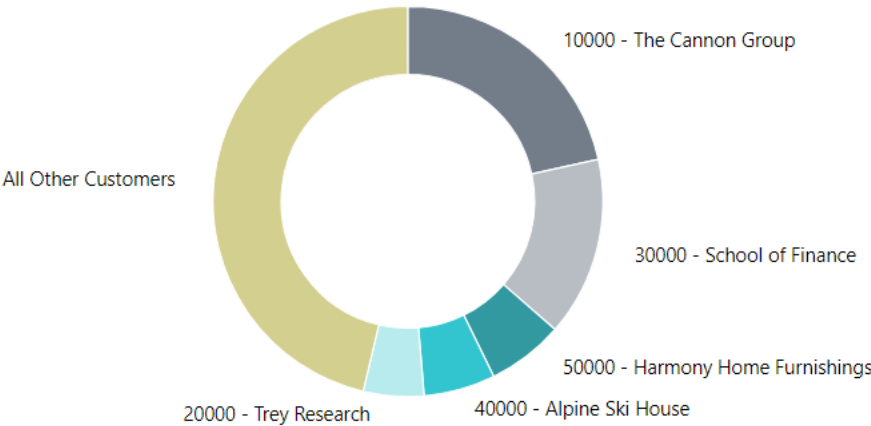
Manufacture

Jobs & Service

- Items
- Customers
 - Vendors
 - Contacts
 - Locations
 - Receive Email
 - Run Audit Report
 - F-Items

Business Performance

Top Five Customers by Sales Value



Power BI

Balance by Department

GlobalDimension1Code ADM PROD SALES

Trial Balance

Description	CURRENT PERIOD - 1: 01/...	CURRENT PERIOD: 01/12/...

OOB content: deliver 35+ excel reports



Income Statement
Balance Sheet
Cash Flow Statement
Statement of Retained Earnings
Chart of Accounts
Trial Balance
Trial Balance/Budget
Trial Balance by Period
Trial Balance/Previous Year
Detail Trial Balance
Closing Trial Balance
Consolidated Trial Balance
Consolidated Trial Balance (4)
Aged Accounts Receivables
Aged Accounts Payables
Customer - Balance to Date
Customer - Top 10 List
Customer - Sales List
Customer/Item Sales
Item Sales by Customer
Sales Statistics
Item Sales Statistics
Salesperson - Sales Statistics
Vendor - Balance to Date
Vendor - Top 10 List
Vendor - Order Detail
Inventory Valuation
Fixed Asset - Book Value 01
Inventory - Sales Statistics
Fixed Asset - Details
Fixed Asset - Analysis
Fixed Asset - Projected Value
Analysis Report

} AND
/OR..

Job Actual to Budget
(cost/price)
Job Analysis
Job – Planning Lines
Job per Item/Item per Job
Customer Jobs (cost/price)
Job Transactional Detail
Job cost Budget
Completed Jobs

Service Contract Customer
Service Contract Profit
Service Contract Salesperson
Service Item Resource Usage

Manufacturing reports

23.x content: 17 of 35 Excel Reports



V23.x

Trial Balance/Previous Year (Excel)

Printer

(Handled by the browser)

▼

Report Layout

./ReportLayouts/Excel/GeneralLedger/Tria...

...

Filter: G/L Account

× No.

▼

× Account Type

▼

+ Filter...

Filter totals by:

× Date Filter

01/01/23..06/30/23

× Department Filter

▼

× Customergroup Filter

▼

+ Filter...

Advanced >

Send to...

Download

Cancel

#3

New Excel Reports Demo

These are very nice too

But I do really love
Excel...

Get blank template From Send To

Report Layouts | Work Date: 1/23/2025

Report Layouts: All Search

Report ID ↑	Report Name
104	Customer - D
105	Customer - S
106	Customer De
107	Customer - O
108	Customer - O
109	Customer - S
110	Customer - L
111	Customer - T
112	Sales Statistic
113	Customer/Item
114	Salesperson -
115	Salesperson -
116	Statement
117	Reminder
117	Reminder
118	Finance Charge
→ 119	Customer - S
120	Aged Account
121	Customer Bal
122	Reminder - T

✓ Saved

Report Layout ...

Extension	Type ↑
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	Word
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC
Base Application by Microsoft	RDLC

Customer - Sales List

Printer (Handled by the browser) ▾

Report Layout /Sales/Reports/CustomerSalesList.rdlc ...

Options

Amounts (LCY) Greater Than 0.00

Hide Address Detail ☐

Filter: Customer

× No. ▾

+ Filter...

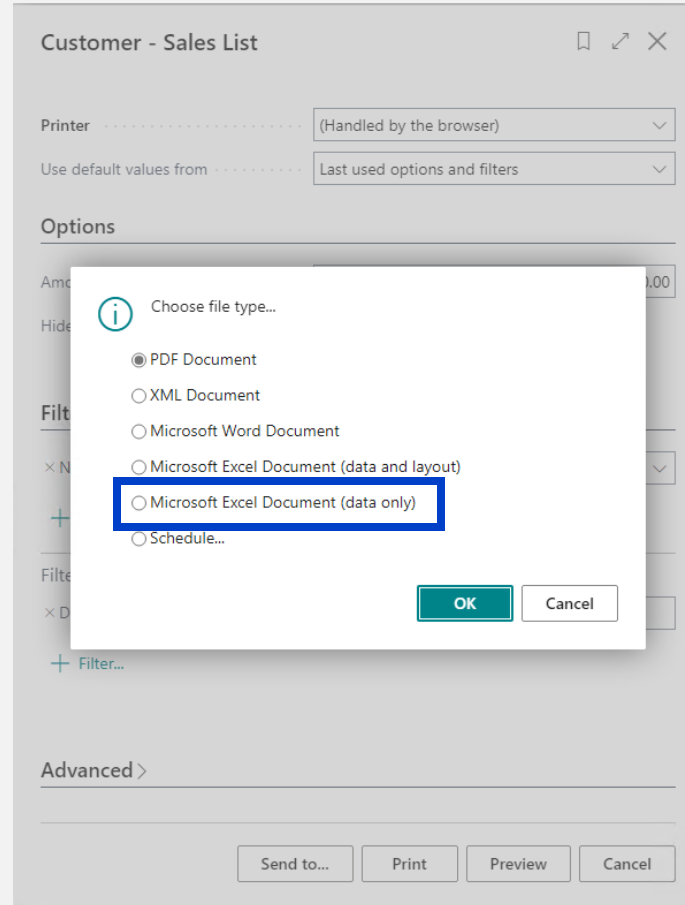
Filter totals by:

× Date Filter ▾

+ Filter...

Send to... Print Preview Cancel

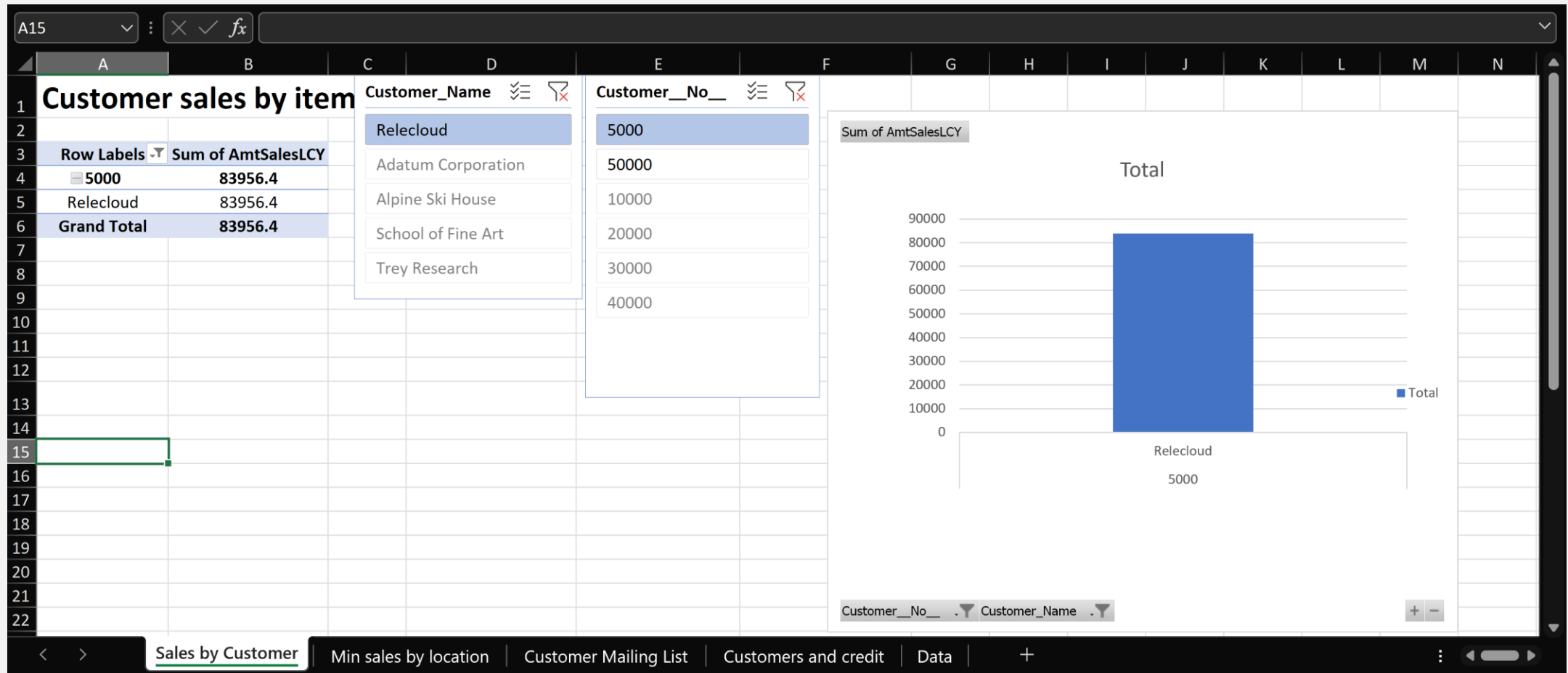
Get blank template



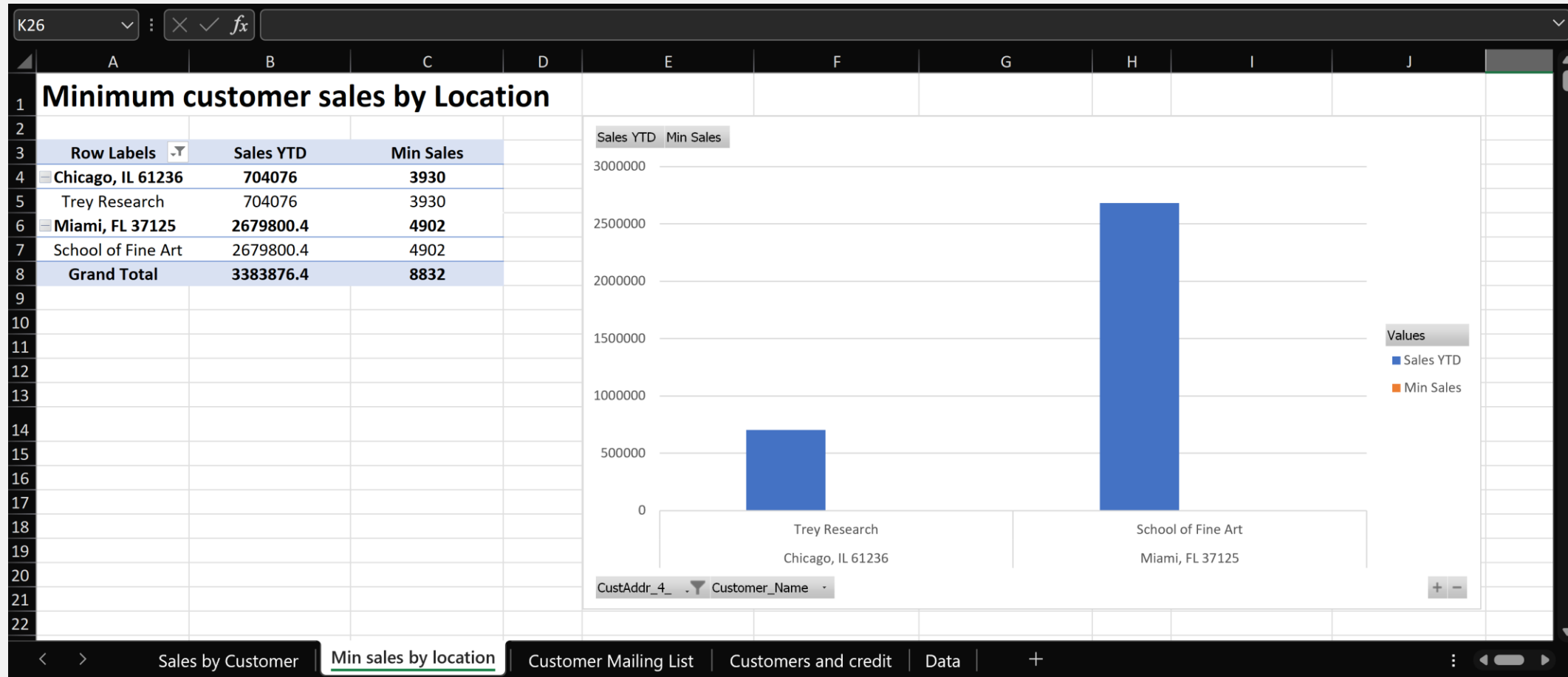
A1 COMPANYNAME

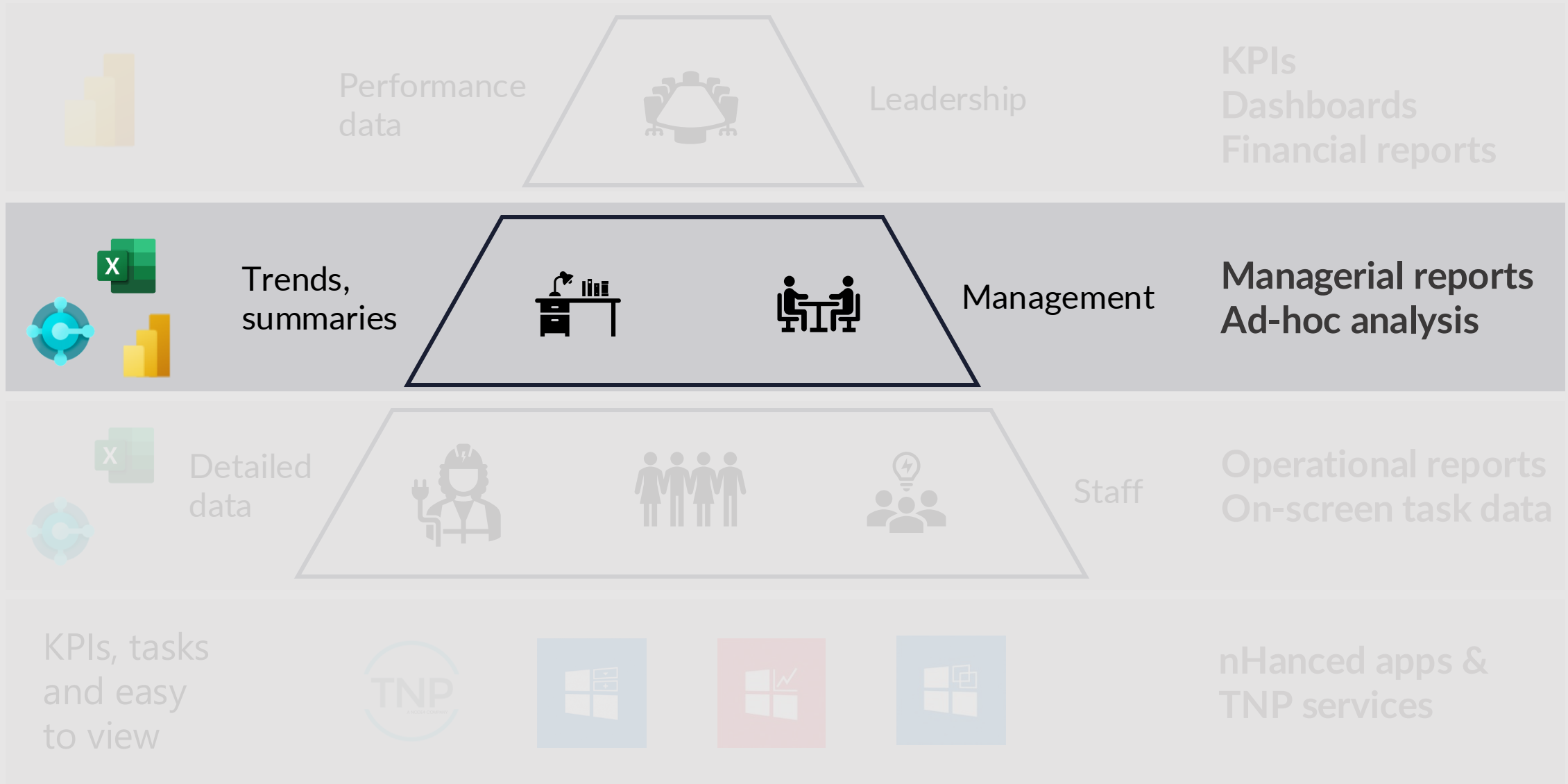
	A	B	D	F	F	G	H	I		
1	COMPANYN_	MinAmtLCY	TABLECAPTION	CustFilter	Customer_No	Customer_Name	Customer_VAT_Registration_No	AmtSalesLCY	CustAddr_2	CustAc
2	CRONUS USA, Ir	304.00	Customer:		10000	Adatum Corporation		223,598.40	Robert Townes	192 Ma
3	CRONUS USA, Ir	277.00	Customer:		20000	Trey Research		58,673.00	Helen Ray	153 Tho
4	CRONUS USA, Ir	434.00	Customer:		30000	School of Fine Art		223,316.70	Meagan Bond	10 High
5	CRONUS USA, Ir	322.00	Customer:		40000	Alpine Ski House		71,453.00	Ian Deberry	10 Dee
6	CRONUS USA, Ir	211.00	Customer:		50000	Relecloud		83,956.40	Jesse Homer	25 Wat
7	CRONUS USA, Ir	215.00	Customer:		10000	Adatum Corporation		223,598.40	Robert Townes	192 Ma
8	CRONUS USA, Ir	378.00	Customer:		20000	Trey Research		58,673.00	Helen Ray	153 Tho
9	CRONUS USA, Ir	383.00	Customer:		30000	School of Fine Art		223,316.70	Meagan Bond	10 High
10	CRONUS USA, Ir	445.00	Customer:		40000	Alpine Ski House		71,453.00	Ian Deberry	10 Dee
11	CRONUS USA, Ir	304.00	Customer:		10000	Adatum Corporation		223,598.40	Robert Townes	192 Ma
12	CRONUS USA, Ir	277.00	Customer:		20000	Trey Research		58,673.00	Helen Ray	153 Tho
13	CRONUS USA, Ir	434.00	Customer:		30000	School of Fine Art		223,316.70	Meagan Bond	10 High
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21	CRONUS USA, Ir	277.00	Customer:		20000	Trey Research		58,673.00	Helen Ray	153 Tho
22	CRONUS USA, Ir	434.00	Customer:		30000	School of Fine Art		223,316.70	Meagan Bond	10 High
23	CRONUS USA, Ir	322.00	Customer:		40000	Alpine Ski House		71,453.00	Ian Deberry	10 Dee
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25	CRONUS USA, Ir	215.00	Customer:		10000	Adatum Corporation		223,598.40	Robert Townes	192 Ma
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27	CRONUS USA, Ir	383.00	Customer:		30000	School of Fine Art		223,316.70	Meagan Bond	10 High
28	CRONUS USA, Ir	445.00	Customer:		40000	Alpine Ski House		71,453.00	Ian Deberry	10 Dee
29	CRONUS USA, Ir	304.00	Customer:		10000	Adatum Corporation		223,598.40	Robert Townes	192 Ma

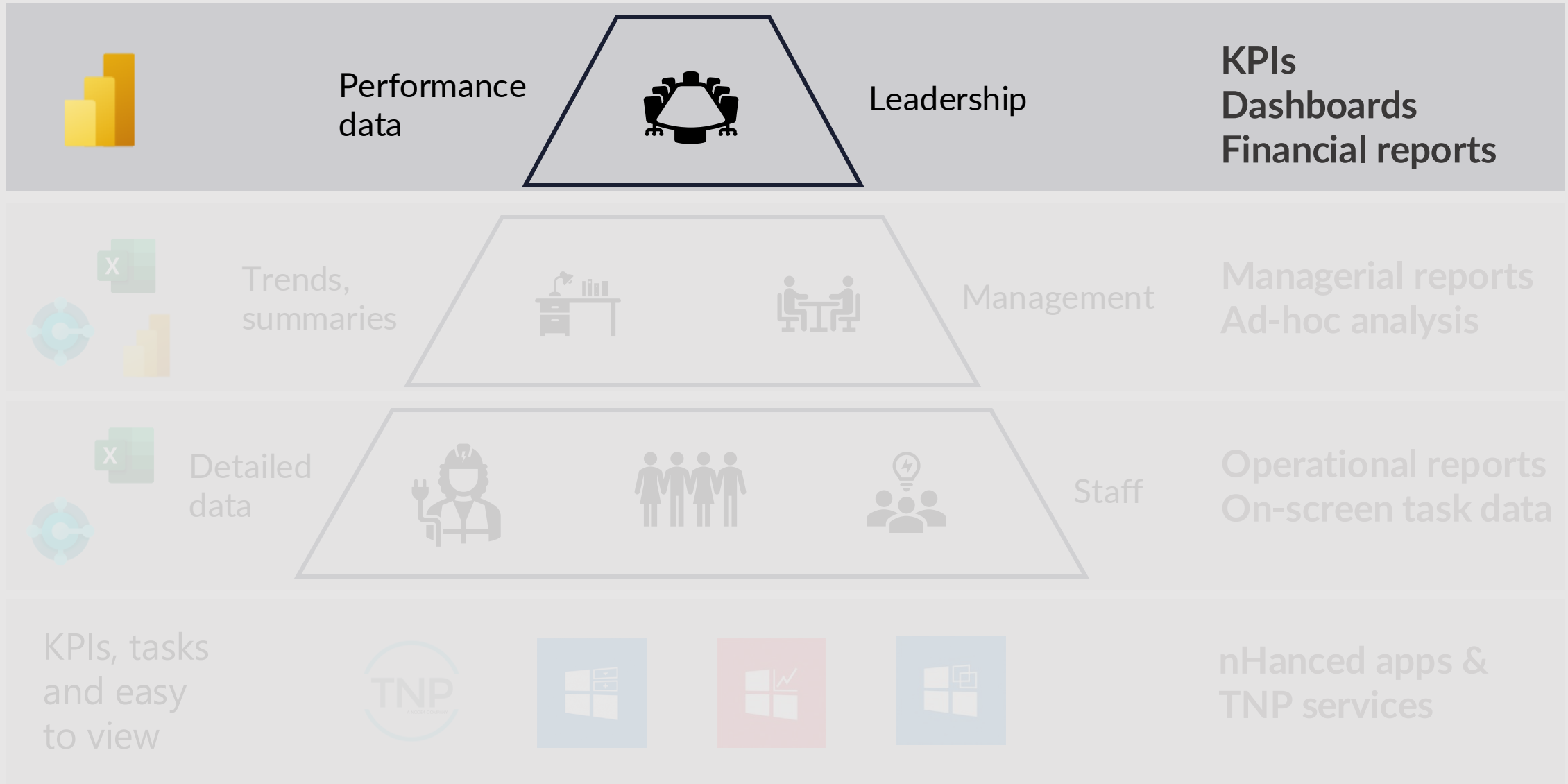
Layout the data (pivot tables, slicers, and charts)



Use multiple pivot tables in the same report







#4

New Out of the box Power BI reports

How to set it up...

Analytics enhancements in 2025 release wave 1



80+ new or enhanced reports

Finance

- Financial Reporting: 10+ features
- Excel reports: 7 reports

Subscription Billing

- Power BI reports: 14 new

Sales

- Power BI reports: 7 new, 5 updated
- Excel reports: 1
- Analysis queries: 1

Manufacturing

- Power BI reports: 8 new, 6 updated
- Excel reports: 8

Sustainability

- Power BI reports: 9 new
- Excel reports: 3

Purchasing

- Excel reports: 1
- Analysis queries: 2

Fixed Assets

- Excel reports: 3
- Analysis query: 1

Inventory

- Analysis queries: 1

Projects

- Analysis queries: 2

Step one

- Get the free report apps in Power BI
- You'll need a Power BI Pro Licence to connect

Step two

- Set up the Power BI Connector
- Add account categories

CRONUS UK Ltd.

All

Reports & Analysis

Administration

power bi

82 results



Finance

> Explore

Power BI Reports (19)

- Finance Report (Power BI)
- Financial Overview (Power BI)
- Income Statement...Month (Power BI)
- Balance Sheet by Month (Power BI)
- Budget Comparison (Power BI)
- Liquidity KPIs (Power BI)
- Profitability (Power BI)
- Liabilities (Power BI)
- EBITDA (Power BI)
- Average Collect...riod (Power BI)
- Aged Receivables...ing (Power BI)
- Aged Payables (...ing) (Power BI)
- General Ledger Entries (Power BI)
- Detailed Vendor...ries (Power BI)
- Detailed Cust. ...ries (Power BI)
- Inventory Valua...port (Power BI)
- Inventory Valua...view (Power BI)
- Inventory Valua...Item (Power BI)
- Inventory Valua...Loc. (Power BI)

General Ledger (5)

- Financial Reporting
- VAT (3)
 - VAT Returns
 - EC Sales List Reports
- Reports (9)
 - VAT Exceptions
 - VAT Register
 - Batch VAT Registration No. Check
 - VAT Statement
 - VAT- VIES Declaration Tax Auth
 - VAT- VIES Declaration Disk...
 - Day Book VAT Entry
 - Day Book Cust. Ledger Entry

Human Resources

> Explore

Employees (1)

- Reports (13)
 - Employee Absences by Causes
 - Employee Addresses
 - Employee Alt. Addresses
 - Employee Birthdays
 - Employee Confidential Info.
 - Employee Contracts
 - Employee Labels
 - Employee List
 - Employee Misc. Article Info.
 - Employee Qualifications
 - Employee Relatives
 - Staff Absences
 - Employee Unions



Purchasing

> Explore

Power BI Reports (14)

- Purchases Report (Power BI)
- Purchases Overview (Power BI)
- Purchases Decom...tion (Power BI)
- Daily Purchases (Power BI)
- Purchases Moving...ages (Power BI)
- Purchases Moving...Total (Power BI)
- Purchases Perio...riod (Power BI)
- Purchases Year-...Year (Power BI)
- Purchases by Item (Power BI)
- Purchases by Purchaser (Power BI)
- Purchases by Vendor (Power BI)
- Purchases by Location (Power BI)

Inventory and Warehouse

> Explore

Power BI Reports (12)

- Inventory Report (Power BI)
- Inventory Overview (Power BI)
- Inventory by Item (Power BI)
- Inventory by Location (Power BI)
- Purchase and Sa...tity (Power BI)
- Item Availability (Power BI)
- Gross Requirement (Power BI)
- Scheduled Receipt (Power BI)
- Inventory by Lot (Power BI)
- Inventory by Se... No. (Power BI)
- Bin Contents (Power BI)
- Bin Contents by...king (Power BI)

Planning & Operations (1)

- Reports (5)
 - Whse. Shipment Status
 - Prod. Order Picking List
 - Customer - List
 - Inventory Picking List
 - Item Expiration - Quantity

Goods Handling (1)

- Reports (9)
 - Whse. Shipment Status
 - Prod. Order Picking List
 - Customer - List
 - Customer Labels
 - Whse. Phys. Inventory List
 - Warehouse Register - Quantity
 - Warehouse Bin List
 - Whse. Adjustment Bin
 - Inventory Put-away List

Assembly (1)

- Reports (4)
 - Assemble to Order - Sales

Manufacturing

> Explore

Power BI Reports (12)

- Manufacturing Report (Power BI)
- Current Utilization (Power BI)
- Historical Utilization (Power BI)
- Work Center Load (Power BI)
- Allocated Hours (Power BI)
- Expected Capacity Need (Power BI)
- Finished Prod. ...down (Power BI)
- Consumption Variance (Power BI)
- Capacity Variance (Power BI)
- Average Product...Times (Power BI)
- Released Produc...ders (Power BI)
- Production Scrap (Power BI)

Planning (1)

- Reports (2)
 - Planning Availability
 - Item Substitutions

Costing (1)

- Reports (2)
 - Inventory Transaction Detail
 - Item Register - Quantity



Sales And Marketing

> Explore

Power BI Reports (11)

- Sales Report (Power BI)
- Sales Overview (Power BI)
- Daily Sales (Power BI)
- Sales Moving Average (Power BI)
- Sales Moving An...Total (Power BI)
- Sales Order - Quantity

Thank You.