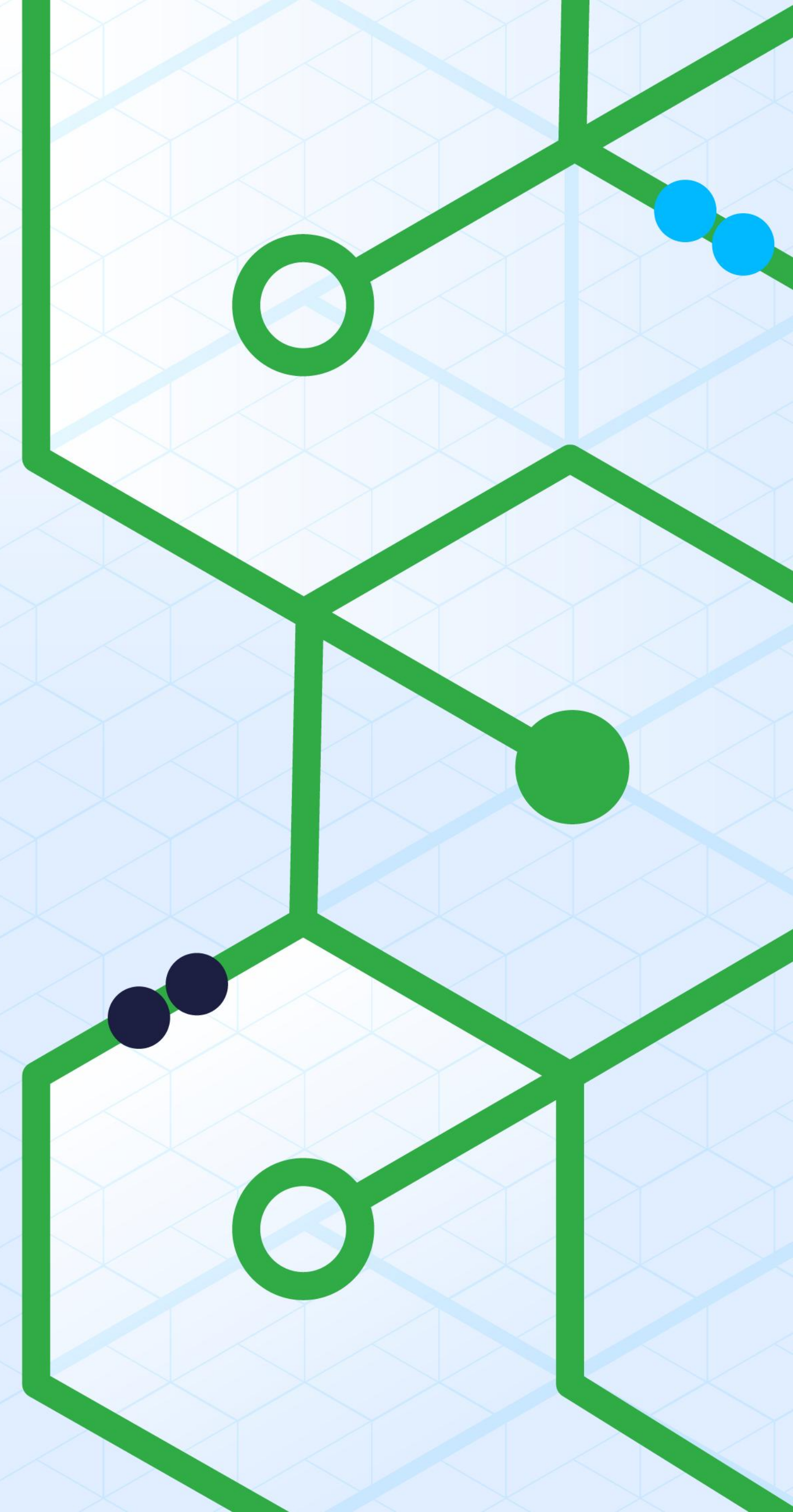




# The Future of Reporting Intelligence with Jet Reports



# Your insightsoftware Team



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Director, Solutions Engineering  
Microsoft

# Agenda

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Who is insightsoftware

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What is Jet Reports

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The Future of Financial Reporting: Power BI Integration, Excel Online, AI Reports Assist, and Fabric Connection

4

What's New for 2026

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Q&A and Close

## Company Facts & Figures

**insightsoftware is the most comprehensive provider of solutions for the Office of the CFO.** We turn information into insights, empowering business leaders to strategically drive their organization.

**\$600M+** Revenue

**500,000+** Users

**34,000+** Customers

**2,500+** Team Members

**1,500+** Partners

**150+** Countries



# **AI Powered Financial Reporting for Business Central**

# Jet Reports Capabilities

Built for Dynamics GP/NAV/D365 Business Central (on prem and Public Cloud)



Microsoft Dynamics 365  
Business Central

- > Fast Flexible Reporting, Directly inside **Excel Desktop** and **Excel Online**
- > **Cloud** Report Automation, Execution and Distribution via **Reports Center**
- > Integrated **AI Assistant**: Doc Assist, Data Assist, and Report Assist
- > Live, **Real-Time** Dynamics Data
- > **Connect directly to Microsoft Fabric**
- > **Power BI** integration via **Reports Center**



# Jet Reports AI Assistant - Lineos



**Lineos**  
AI powered by insightsoftware

## AI Solutions to Customer Problems



### Doc Assist

- Quickly access precise product information without leaving the application.



### Data Assist

- Conduct real-time trend analysis and anomaly detection effortlessly.



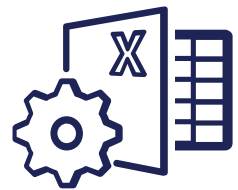
### Report Assist

- Easily construct and refine financial reports with minimal effort.

*\*Only available for Jet Reports Platform subscriptions\**

# Reports Center

## Cloud Report Management



### Automated Report Management

➤ Automate time-consuming tasks like uploading, scheduling, and report distribution



### Unified Platform

➤ Centralized, cloud-based portal to share, access, and update reports anywhere, anytime.



### Real-time Accessibility

➤ Experience real-time access report access – Reports Center keeps data organized, accurate, and actionable.



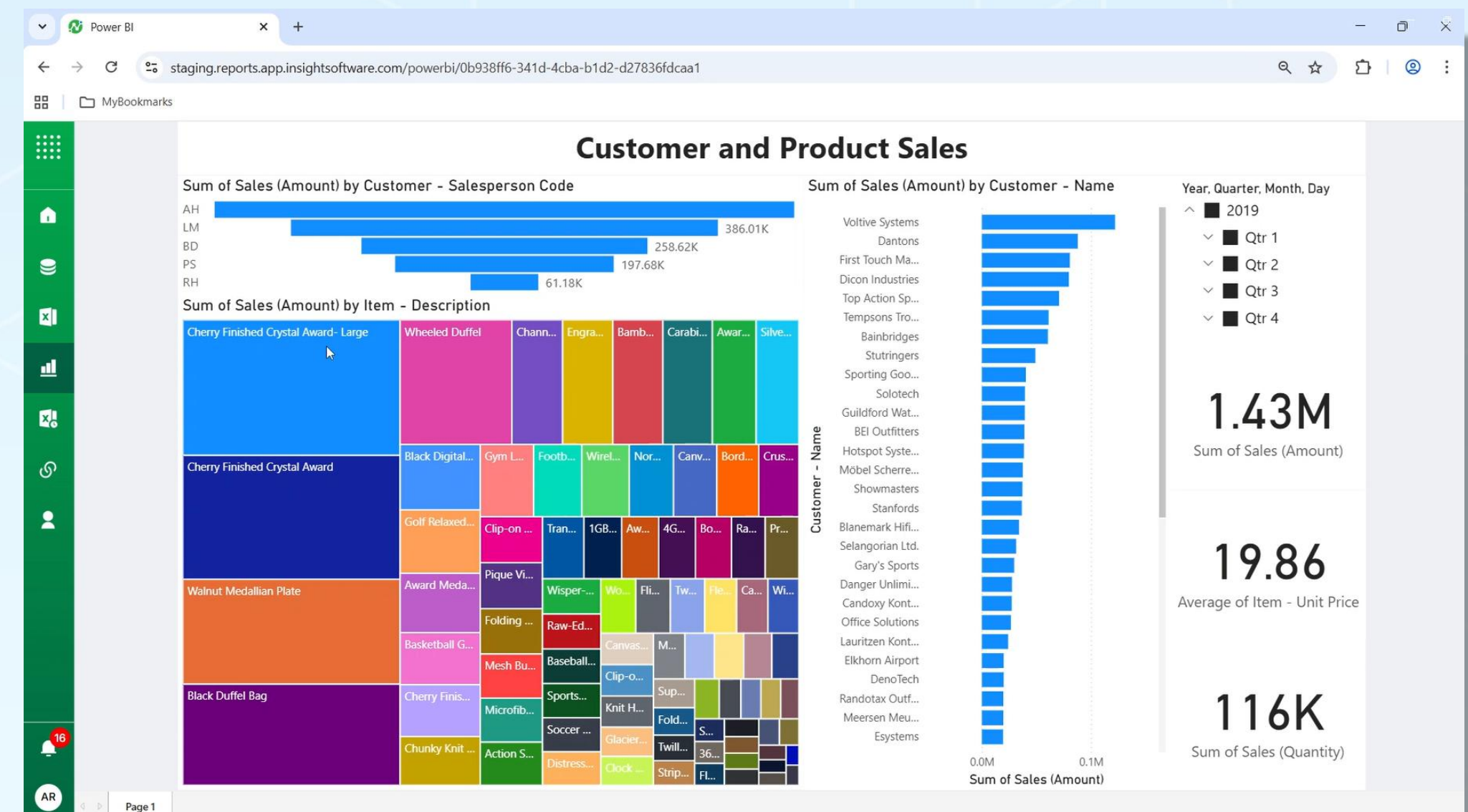
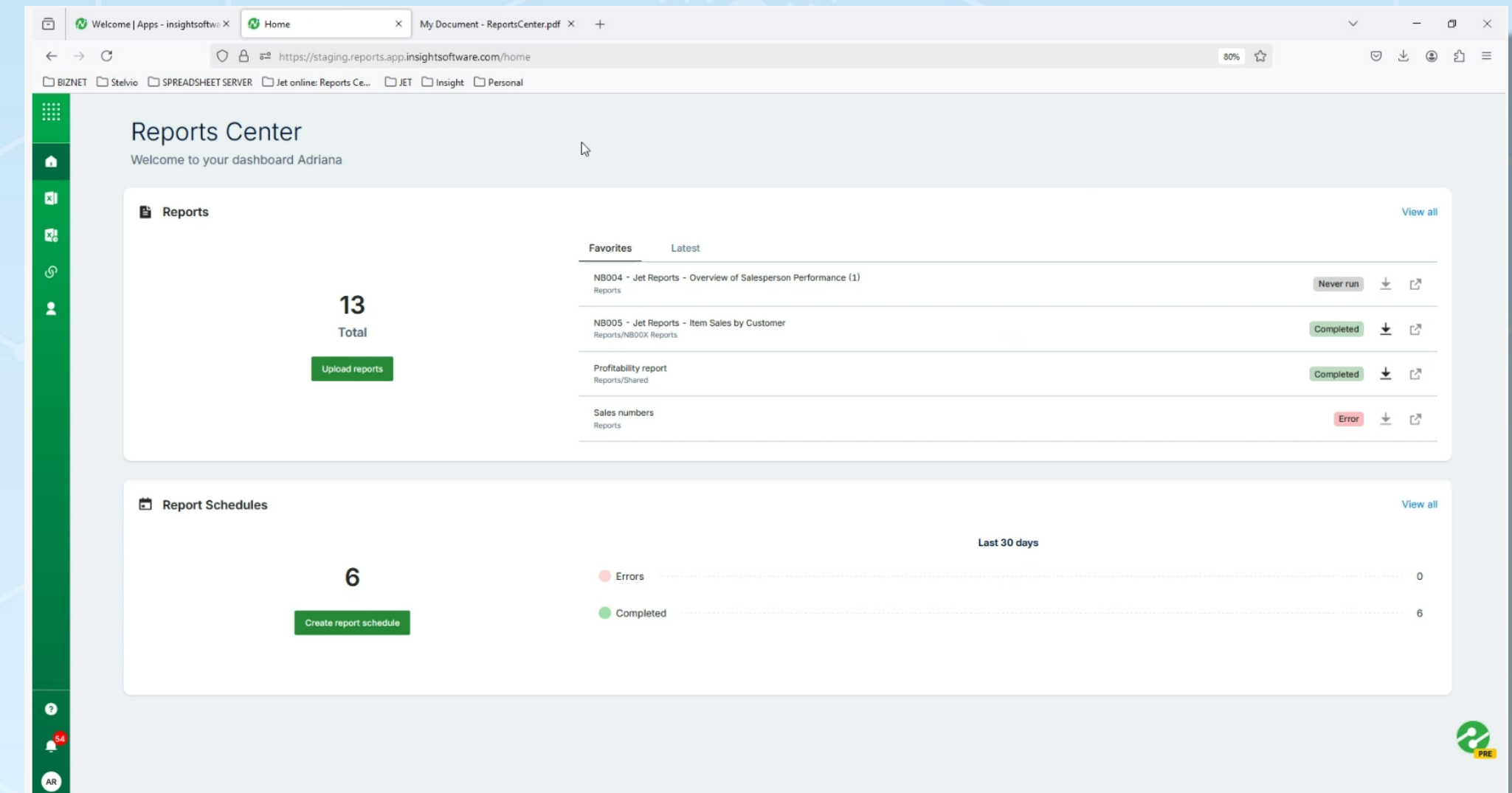
### Advanced Security and Compliance

➤ Protect sensitive financial data with encryption, role-based permissions, and compliance with top regulatory standards like GDPR.

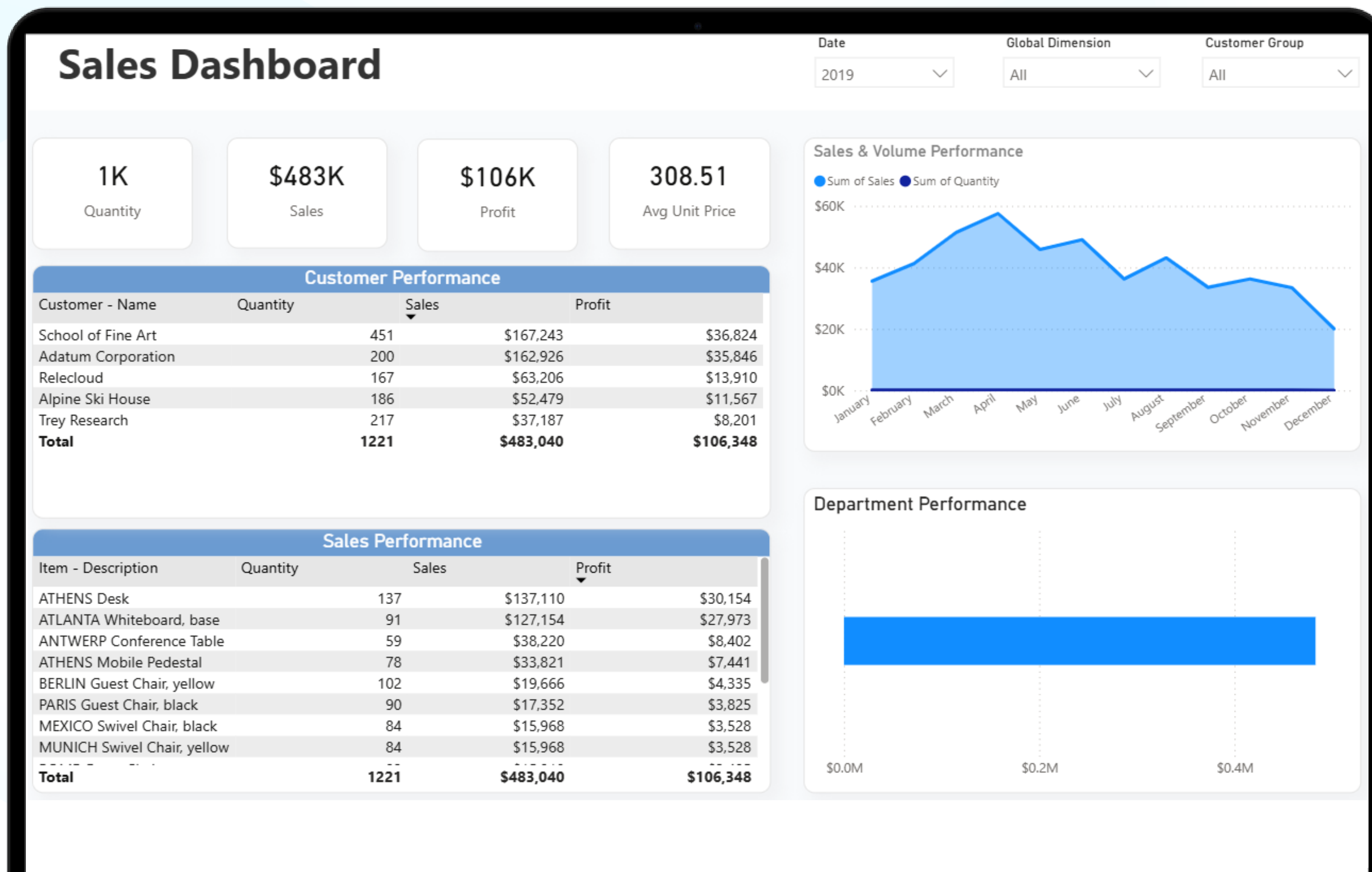


### Power BI Integration

➤ Protect sensitive financial data with encryption, role-based permissions, and compliance with top regulatory standards like GDPR.



# Power BI Integration Dashboard Images



# The Speed of Jet Reports

Key Performance Statistics – Based on Jet Reports version 24.1 or higher with real-time BC Cloud Connection

80%

Of all reports run have completed in ***under 15 seconds***



92%

Of all reports run have completed in ***less than 1 minute***



97%

Of all reports run have completed in ***less than 5 minutes***



99.6%

Of all reports run have completed in ***less than 15 minute***





# **What's New** **Coming June 2026**

# The Autonomous AI layer for Business Central Reporting

Reporting Intelligence adds always-on AI on top of your existing Business Central reports — monitoring your financials 24/7, surfacing anomalies before they become problems, and freeing your team from reactive data prep.

**24/7**

AI monitoring your BC data

**Zero**

New tools. No IT lift.

## ALWAYS-ON MONITORING

**AI watches your data so your team doesn't have to**

Continuous scans across GL, AP, AR, and department-level activity — inside the tools finance already uses.

## ANOMALY DETECTION

**Surfaces what's off before you'd notice**

Flags variances, outliers, and unexpected trends in real time. Teams catch issues at the source instead of at close.

## INTELLIGENT ALERTS

**Proactive signals, not passive dashboards**

Rule-based, threshold-driven alerts delivered in-context. The right signal at the right moment — with finance-grade governance.

**No migration required.** Autonomous AI runs on top of your current Business Central deployment — no data warehouse build, no ERP overhaul, no waiting.

