

Reporting in BC What are your options?

UD 26

Paul Swan

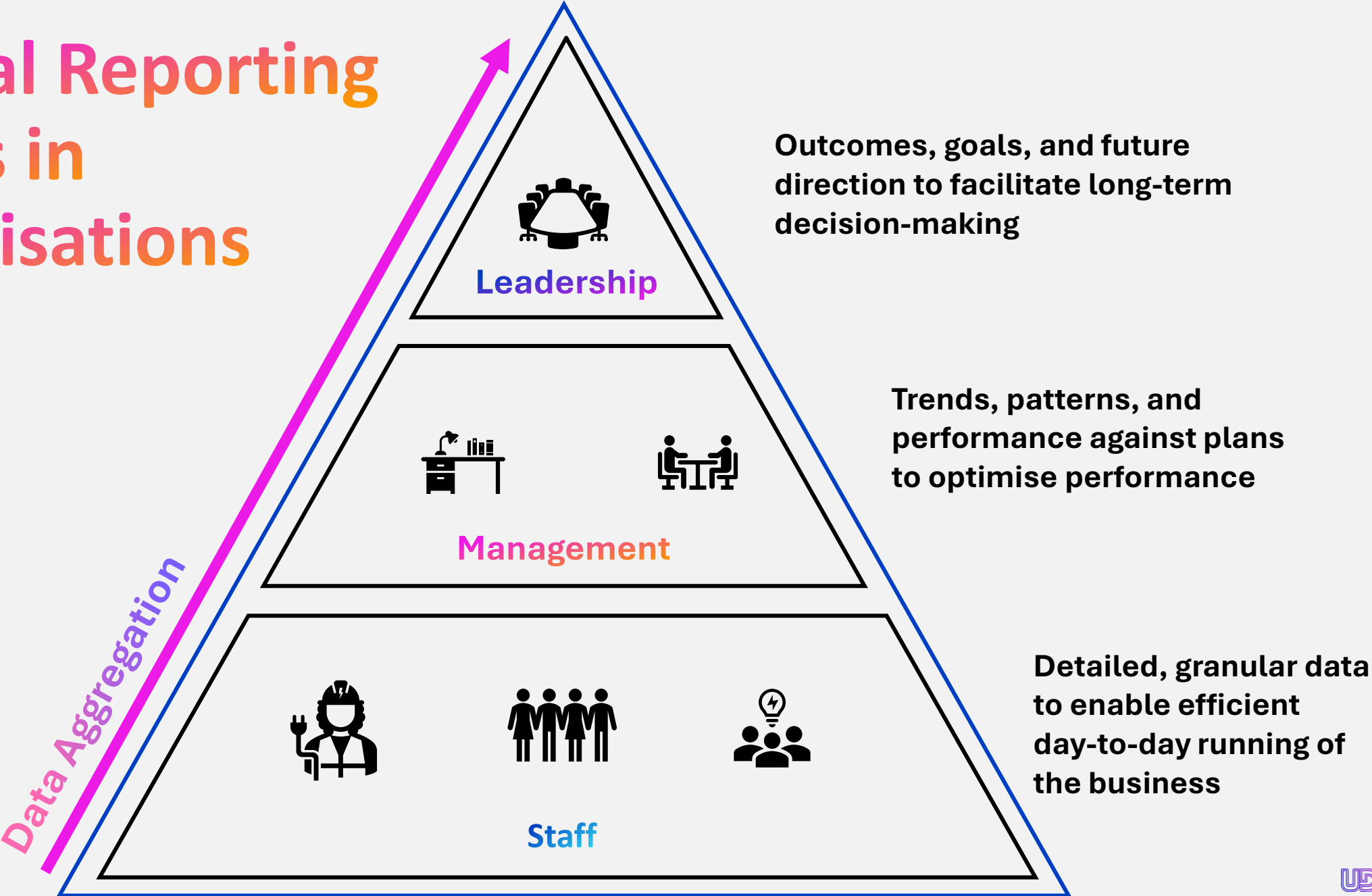
Business Central Support Consultant

Kevin Moore

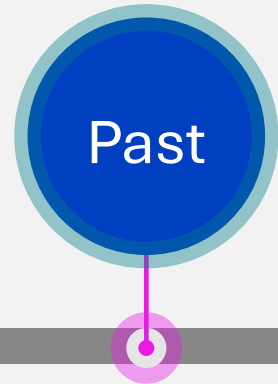
Business Central Presales Consultant



Typical Reporting needs in organisations



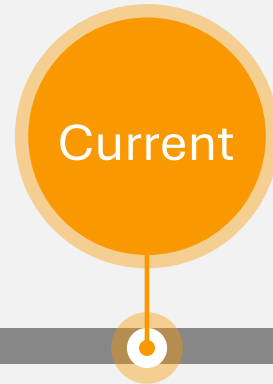
BC Reporting Direction



Past

Where have we come from?

Static RDLC reports.
Document-based, developer-owned.
Printing to PDF or paper.
Power BI and Excel were external tools.



Current

Where are we now?

RDLC still used for documents.
Better tools within BC.
Deeper Excel and Power Bi integration.
Co-pilot in its infancy.



Future?

Where its looks like to be heading?

Excel as a reporting bridge.
Co-pilot becoming the first intercation.
Insights not raw data.



Out of the Box

Functionality available as standard.

- Fact Boxes
- Analysis mode

- On-screen task data

- Standard BC Reports

- Operational & Financial reports

- Export
- Copy & Paste

- Ad-hoc reports



Fact Boxes

Real-time, related data without requiring users to navigate away from their current screen

NODE4 Dynamics 365 Business Central

Athena UK Ltd. | < Finance > Cash Management > Sales > Purchasing > Graphical Scheduler > NET > | A PA SO

Sales Orders: All > + New Delete Home > Release > Post... > Print/Send > ...

No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Location Code	Assigned User ID	Docu Date
101001-01	10000	Adatum Corporation				04
101001-02	10000	Adatum Corporation				04
101001-03	10000	Adatum Corporation				04
101002	10000	Adatum Corporation				01
101002-01	10000	Adatum Corporation				01
101003	30000	School of Fine Art				22
101004	40000	Alpine Ski House				13
101005	40000	Alpine Ski House				06
101018	10000	The Cannon Group				06
101019	10000	The Cannon Group				07
101020	10000	The Cannon Group				19
101021	10000	The Cannon Group				06
101022	C00220	Tom Bevan				06
101025	10000	The Cannon Group				06
101025-01	10000	The Cannon Group				06
101026	20000	Trey Research				06
101027	10000	The Cannon Group				06
101027-01	10000	The Cannon Group				06
101027-02	10000	The Cannon Group				06
101027-03	10000	The Cannon Group				06
101028	60000	Blanemark Hifi Shop				20
101029	C00090	Gary Warden				20

Details Attachments (0)

Remaining Amount 2,110.00

Customer Statistics

Customer No.	10000
Balance (LCY)	33,447.50
Balance (LCY) As Vendor	0.00
Sales	
Outstanding Orders (LCY)	206,472.99
Shipped Not Invoiced (LCY)	9,301.25
Outstanding Invoices (LCY)	186,634.10
Service	
Outstanding Serv. Orders (...)	0.00
Serv Shipped Not Invoice...	0.00
Outstanding Serv.Invoices...	0.00
Payments	
Payments (LCY)	203,941.38
Refunds (LCY)	0.00
Last Payment Receipt Date	01/12/2024
Total (LCY)	412,394.88
Credit Limit (LCY)	35,000.00
Overdue Amounts (LCY)	33,447.50
Total Sales (LCY)	22,971.86
Invoiced Prepayment Amo...	23,460.96

Customer Details >

Customer No. 10000



Analysis Mode

Interactive tool that transforms standard list pages into flexible, pivot-style grids for instant data grouping, filtering, and summarisation without exporting to Excel

Analysis Mode

Columns

- External Document No.
- Location Code
- Assigned User ID
- Document Date
- Document Date Year
- Document Date Quarter
- Document Date Month
- Status
- eDocument Status
- Completely Shipped
- Job Queue Status
- Amount Shipped Not Invoiced...
- Amount Shipped Not Invoiced...
- Amount

Row Groups

- Sell-to Customer Name
- Status

Values

- Sum(Amount)
- Sum(Amount Including VAT)

Column Labels
Drag here to set column labels

Sell-to Customer Name / ...	Sum(Amount)	Sum(Amount Including VAT)
Adatum Corporation (5)		
Released (4)	11,404.82	13,685.78
Open (1)	1,233.00	1,479.60
Sub Total Adatum C...	12,637.82	15,165.38
School of Fine Art (4)	14,271.00	14,271.00
Alpine Ski House (9)	32,638.06	32,638.06
The Cannon Group (41)	150,329.12	181,624.94
Tom Bevan (1)	406.50	487.80
Trey Research (54)	102,458.05	120,892.49
Blanemark Hifi Shop (1)	1,000.00	1,200.00
Gary Warden (3)	2,677.10	3,212.52
John Smith (23)	23,459.70	28,151.64
Mary Smith (6)	1,259.51	1,511.41
The Device Shop (1)	263.96	316.75
City Electrical Factors - ... (1)	1,715.55	2,058.66
BARNSELY ELECTRICAL... (1)	1,004.22	1,205.06
SC Electronics (1)	5,311.60	5,311.60
The Cannon Group PLC (18)	43,387.39	52,064.87
Wide World Importers (1)	14,107.40	14,107.40
Red Lion (2)	635.00	635.00
Costco Wholesale UK L... (1)	2,417.75	2,417.75
Bedmax Shavings (1)	1,356.30	1,356.30
Andre Verster (1)	137.61	165.13
Total	413,113.08	480,761.09

Rows: 177 Total Rows: 177



Standard BC Reports

Over 500 built-in standard reports covering:

- Finance
- Sales & Marketing
- Purchasing
- Inventory/Warehouse

The screenshot displays the Microsoft Dynamics 365 Business Central interface for 'Athena UK Ltd.'. The top navigation bar includes 'All', 'Reports & Analysis', and 'Administration'. The 'Reports & Analysis' menu is expanded, showing a list of report categories and sub-items:

- Accountant**
 - > Explore
 - Home (2)
 - Finance (1)
- Finance**
 - > Explore
 - Power BI Reports (20)
 - General Ledger (5)
 - Financial Reporting
 - VAT (3)
 - Intercompany (1)
 - Consolidation (1)
 - Reports (5)
 - Cash Management (1)
 - Cost Accounting (1)
 - Receivables (1)
 - Reports (19)
 - Customer Detailed Ageing
 - Customer Register
 - Customer - Balance to Date
 - Customer - Detail Trial Bal.
 - Customer - List
 - Customer - Summary Ageing
 - Customer - Summary Ageing Simp.
 - Customer - Order Summary
 - Customer - Order Detail
 - Customer Labels
 - Customer Top 10 List
 - Sales Statistics
 - Customer/Item Sales
- Apportunix**
 - > Explore (empty)
- Graphical Scheduler**
 - > Explore (empty)
- MxAPS Advanc...y Scheduling**
 - > Explore (empty)
- Purchasing Agent**
 - > Explore
 - Home (2)
 - Purchase Analysis Reports
 - Inventory Analysis Reports
- Service Manager**
 - > Explore (empty)

On the right side of the interface, a sidebar shows additional report categories: Document, Periodic Ac, Human F, Employees, NETRON, Resource, Resources, and Sustaina, each with an 'Explore' link.



Export & Copy/Paste

Utilise the power of Excel

10200 Income, Product Sales

General Ledger Entries | Edit List | Home | Review Entries | More options

Find entries... Reverse Transaction... Correct Dimensions Entry

Open in Excel
Edit in Excel
Share to Teams
Copy link

Opens an Excel file with the data

Posting Date	Document Type	Document No.	G/L Account No.	Description	Department Code	Posting	Gen. Bus Posting
→ 01/12/2024	Invoice	103294	10200	Order 101273			DOM
01/12/2024	Invoice	103293	10200	Order 101272		Sale	DOM
01/12/2024	Invoice	103292	10200	Order 101271		Sale	DOM
01/12/2024	Invoice	103291	10200	Order 101268	SALES	Sale	DOM
01/12/2024	Invoice	103290	10200	Order 101267	SALES	Sale	DOM
01/12/2024	Invoice	103289	10200	Order 101106		Sale	DOM
01/12/2024	Invoice	103288	10200	Order 101264	SALES	Sale	DOM

10200 Income, Product Sales

General Ledger Entries | Edit List | Home | Review Entries | More options

Find entries... Reverse Transaction... Correct Dimensions Entry

Posting Date	Document Type	Document No.	G/L Account No.	Description	Department Code	Project Code	Gen. Posting Type	G P
✓ 01/12/2024	Invoice	103294	10200	Order 101273			Sale	
✓ 01/12/2024	Invoice	103293	10200	Order 101272			Sale	
✓ 01/12/2024	Invoice	103292	10200	Order 101271			Sale	
✓ 01/12/2024	Invoice	103291	10200	Order 101268	SALES		Sale	
✓ 01/12/2024	Invoice	103290	10200	Order 101267	SALES		Sale	
✓ 01/12/2024	Invoice	103289	10200	Order 101106			Sale	
✓ 01/12/2024	Invoice	103288	10200	Order 101264	SALES		Sale	
→ ✓ 01/11/2024	Invoice	103279	10200	Order 101263	PROD		Sale	
○ 01/11/2024	Invoice	103278	10200	Order 101262			Sale	
○ 01/11/2024	Invoice	103277	10200	Order 101261			Sale	

8 rows copied.



Convenience Add-ons

Simple add-ons that enhance
the user experience.

- nHanced Panels & Tiles

- On-screen task data

- nHanced Quick Reports

- Self Service reports

- Jet Reports

- Bespoke Operational & Financial reports



Panels & Tiles

Role centre-based information tiles to assist day-to-day operations.

- Drill down capability.
- Customisable.

Customer was Trey
Bought for £9,264

Opportunities

No.	Clos...	Creation Date	Description	Contact No.	Sales Code
OP000002	<input checked="" type="checkbox"/>	06/05/2020	Selling some stuff	CT000001	ALEXV
OP000003	<input type="checkbox"/>	25/10/2021	Sell new stuff	TOMB	ALEXV
OP000004	<input checked="" type="checkbox"/>	01/09/2024	Selling stuff to a school	CT000002	ALEXV
OP000006	<input type="checkbox"/>	01/09/2024	Selling stuff to a school	CT000013	ALEXV
OP000007	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000015	ALEXV
OP000008	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000019	ALEXV
OP000009	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000001	ALEXV
OP000010	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000045	ALEXV
OP000011	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000003	ALEXV
OP000013	<input type="checkbox"/>	01/09/2024	Selling Tile to London Undergr...	CT200021	ALEXV
OP000014	<input type="checkbox"/>	01/09/2024	Sell some tiles	CT000001	ALEXV
OP000016	<input type="checkbox"/>	01/09/2024		CT000461	TOMB
OP000017	<input type="checkbox"/>	01/09/2024	Sell some stuff	CT000001	ALEXV
OP000019	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000110	ALEXV
OP000020	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000013	ALEXV
OP000021	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000015	ALEXV
OP000022	<input type="checkbox"/>	01/09/2024	People-who-have-bought-chairs	CT000019	ALEXV

Contact Name The Cannon Group PLC Contact Company Name



Quick Reports

Self service - user driven - custom reports.

Business Central

Quick Reports

New Home Run Report Filtering "My"/Public More options

New

Name	Description
Cases	Cases
Customer Report	Customer Report
Items_Stock	Items_Stock
List For Auditors	List For Auditors

nHanced View Card

Customer Report

Home Report View Export Actions Fewer options

Reload Content

Drag a column header and drop it here to group by that column

No.	Name	City	Credit Limit (LCY)	Balance (LCY)	Sales (LCY)	Profit (LCY)	Bal.
10000	The Cannon Group PLC	London	35000	33447.5	196465.4	65007.91	
20000	Trey Research	London	0	11253.85	47955.15	18505.65	
30000	School of Fine Art		0	13331.4	144894.6	33669.3	
40000	Alpine Ski House		0	649.4	47007.2	12953.82	
50000	Harmony Home Furnishings	Guildford	0	13205.52	63830.6	14452.96	
60000	Blanemark Hifi Shop	London	0	0	0	0	
61000	Michael Vanderhyde	London	0	0	0	0	
62000	The Device Shop	London	0	0	0	0	

Filters Show more

My Reports Visible Public Reports Visible



Jet Reports

Excel based customisable reports for when you need to see the figures.

- Endless possibilities.
- Self service reporting.
- Utilise the power, flexibility and existing user knowledge of Excel.

The screenshot displays a complex Excel report interface. At the top, there's a navigation bar with a search icon and window controls. Below it, a 'Balance Sheet' and 'Financial Ratio' section is visible. The main area is titled 'Top Customer Overview By Sales' and includes several filter panels: 'Salesperson' (listing names like Annette Hill, Bart Duncan, etc.), 'Global Dimension' (listing CORPORATE, EVENTS, SPORTS), 'Country/Region' (listing Austria, Belgium, Canada, Denmark), 'State/Country' (listing AR, CA), and 'City' (listing Aarhus C, Ålborg, Amsterdam, Arnhem). A 'Dates' section shows '07/01/16..12/31/16' and 'Run Date: 23/04/2026'. Below the filters is a 'Customer' list with a 'Sales' column showing values like 4, 7, 8, 2, 2. To the right, there's a 'PROFIT AND LOSS' section with 'Budget Name: 2018', 'Start Date: 01/01/2018', and 'End Date: 06/06/2018'. A table below this shows 'Current Period', 'Budget', and 'Variance to Budget' (both % and Amount). The 'ST.MORITZ Storage Unit/Drawers' report includes a product image and a table with columns for 'Item No', 'List Price', 'Qty In Inventory', 'Net Weight (lbs)', and 'Gross Weight (Lbs)'. The table also shows 'Current Period', 'Budget', and 'Variance to Budget' for each item. The variance to budget for the total is (13%) and (546,604).

		Current Period	Budget	Variance to Budget	
				%	Amount
ST.MORITZ Storage Unit/Drawers		8,630,408		(18%)	(1,160,334)
		2,657,219		(13%)	(334,746)
		-		-	-
		(207,201)		(19%)	40,197
		(79,459)		(18%)	14,072
Item No		1928-W			
List Price		\$ 342.10			
Qty In Inventory		215			
Net Weight (lbs)		23.10			
Gross Weight (Lbs)		26.58			
		.000,967		(16%)	(1,440,810)
		(3,692,364)		(16%)	586,086
		(1,232,052)		(14%)	175,125
		-		∞	132,395
		1,924,415		(18%)	894,206
		1,076,551		(13%)	(546,604)
		(30,016)		(16%)	4,803
		(16,865)		(11%)	1,931



Business Intelligence Add-ons

For when you just need to go full Klingon on your data.

- Jet Analytics

- Fast, flexible BI and reporting.

- MS Fabric

- SaaS-based analytics platform, business intelligence in one workspace

- Power BI

- Interactive, actionable insights & Visualisation



Jet Analytics

- Fast no-code or low-code model
- Data warehousing and business intelligence
- One version of the truth directly from Business Central and other sources

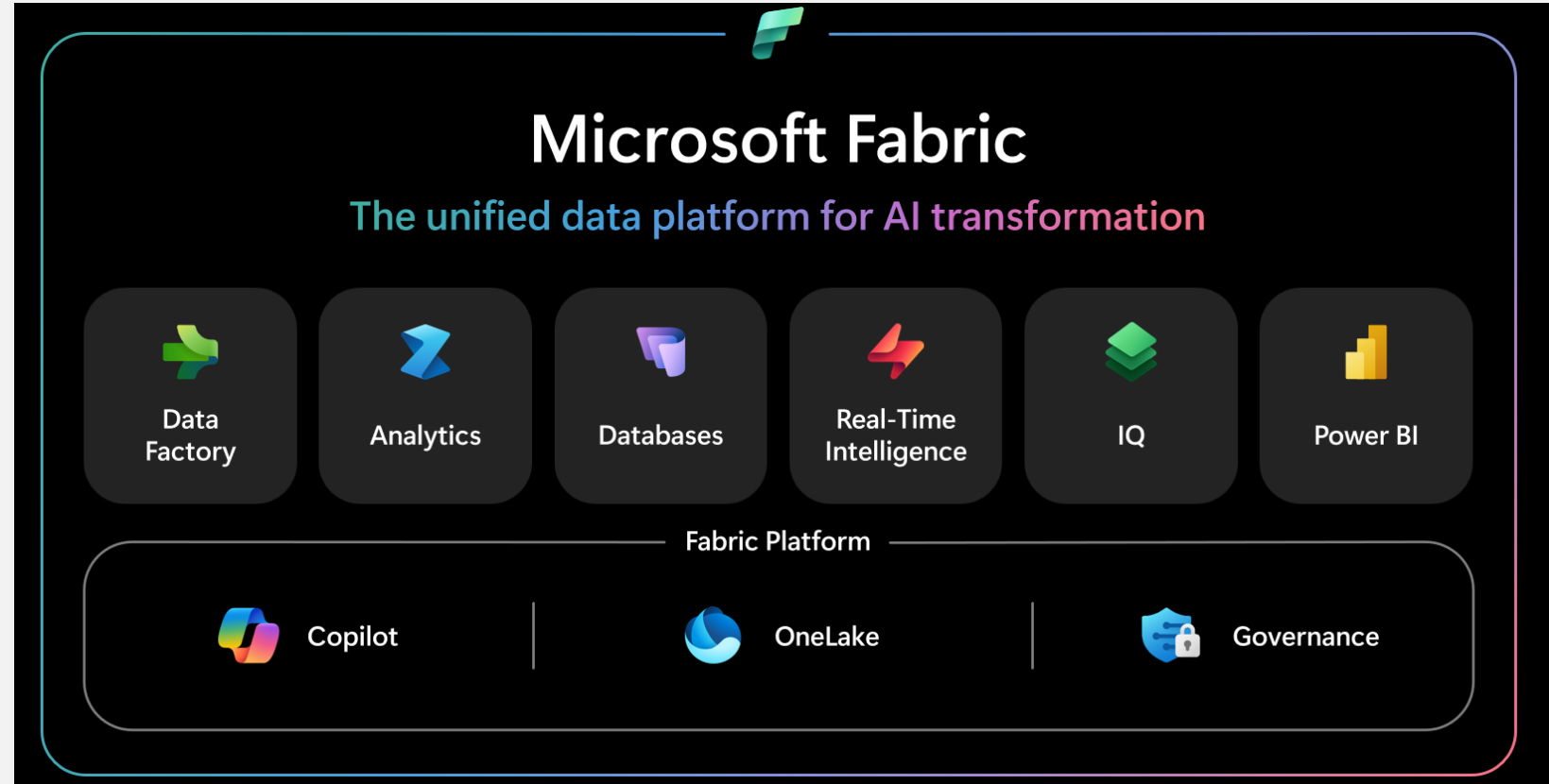




MS Fabric

The next generation data & Information platform in one workspace

- Data integration
- Data engineering
- Data science
- Data warehouse
- Real-time intelligence
- Business intelligence



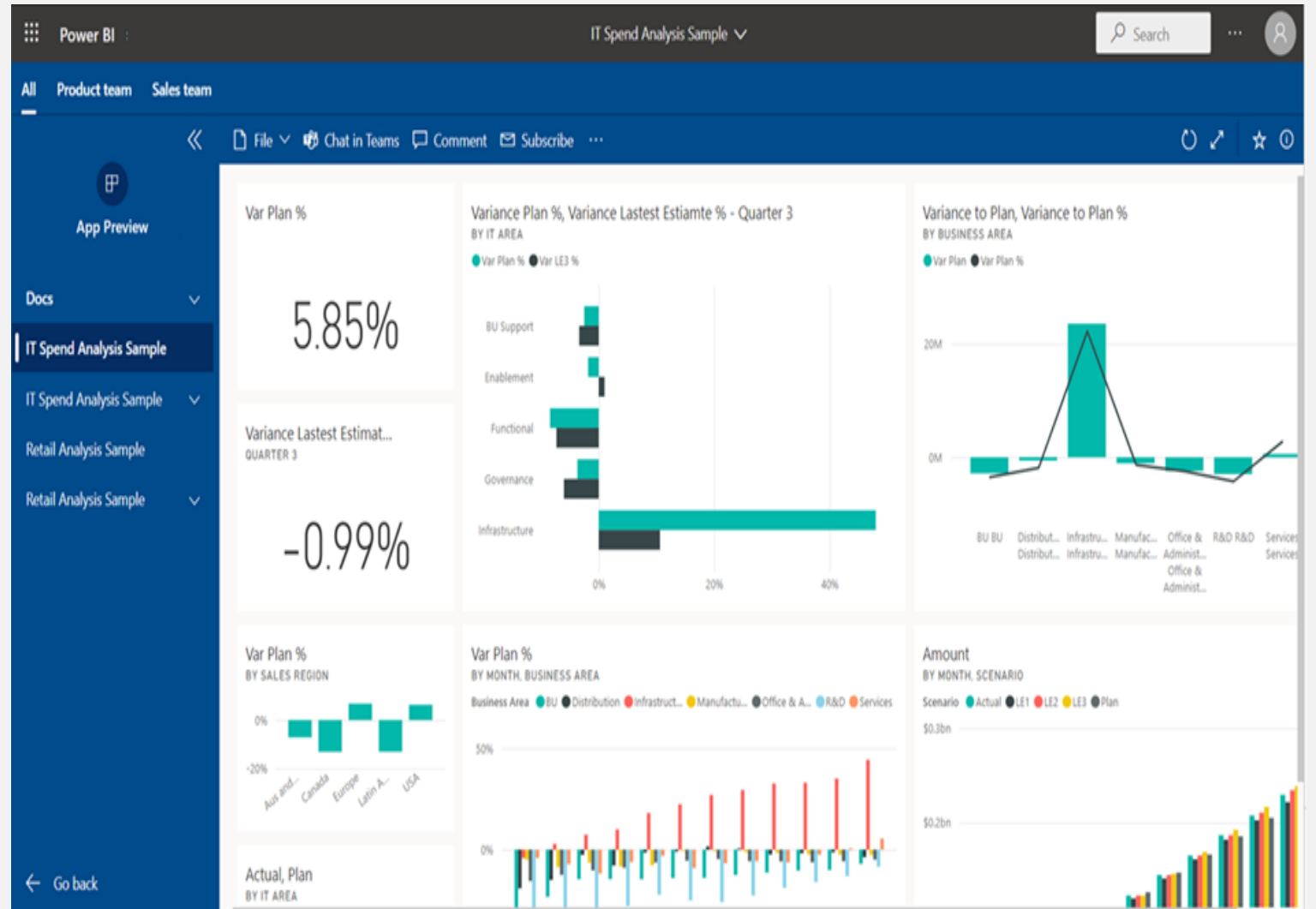


Power BI

For when you just need to visualise the hell out of your data.

Turn MB's of data to easy-to-understand information.

Spot trends and outliers easily.



Power BI

- **Embedded MS Dashboards**
- **Integration**
- **nHanced Power Pack**
- **Build Your Own**

Thank You.

Questions?

