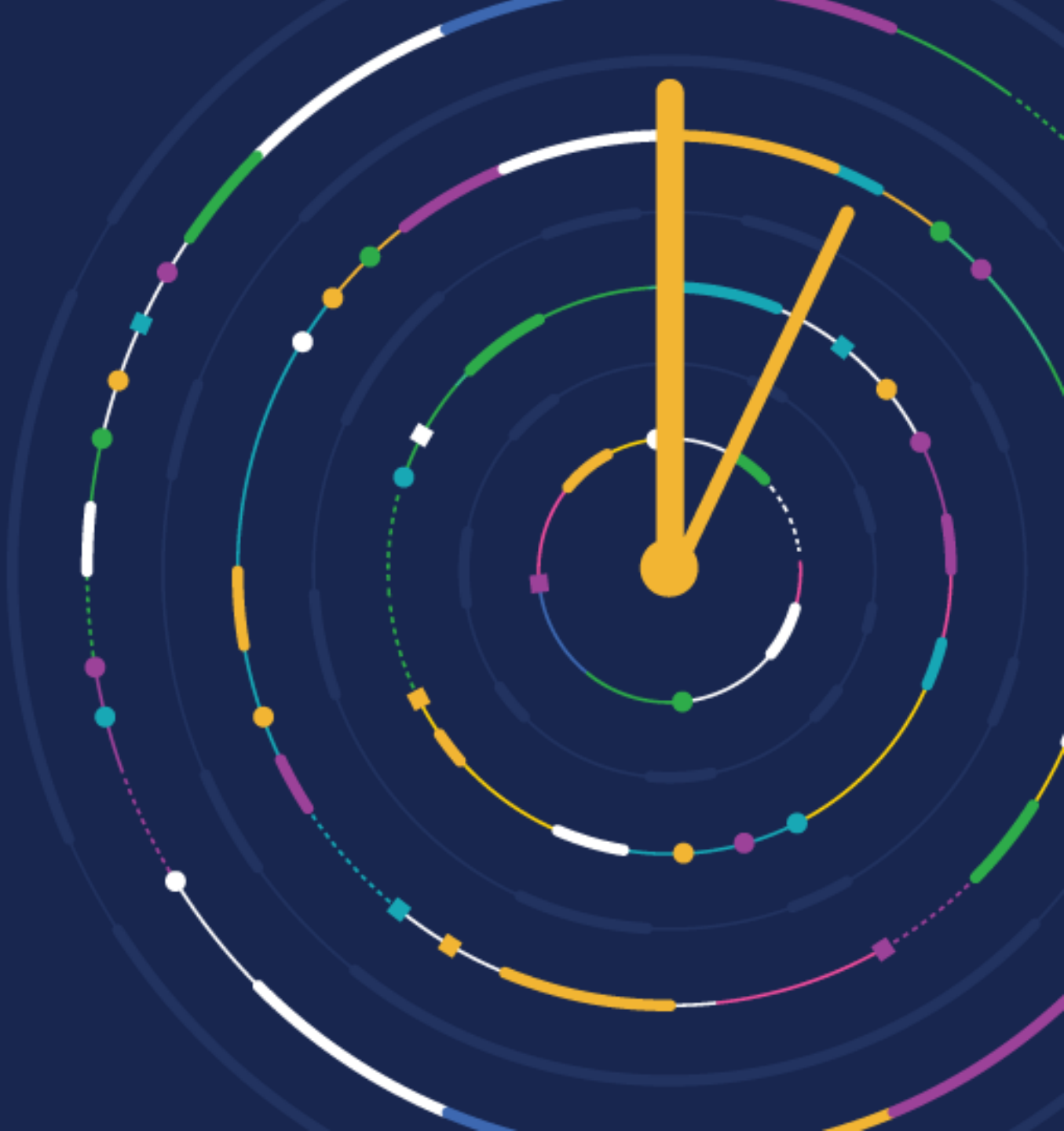
tecman

Reporting Today: What are your options for reporting from Business Central

George Murcott

CUSTOMER DAY 2023



Get better value out of standard Business Central features

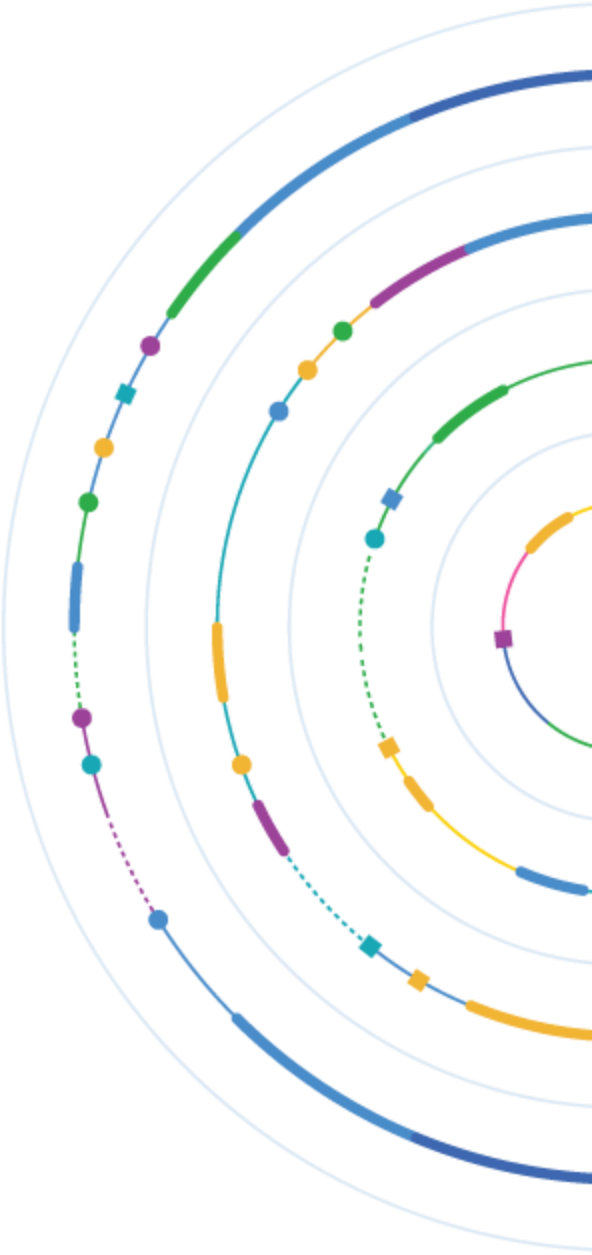
then use

External reporting tools (Jet Reports, Power BI, Cosmos)

When I were a lad...

But now...

And in the future?



It’s not just about actual reports…

- Role Centre parts
- Role Centre charts
- My Customers etc.
- Statistics Screens
- Company Hub

Can your users do the basics?

- Receivables/Payables
- Chart of Accounts Overview
- G/L Account Balance
- G/L Balance
- G/L Balance by Dimension
- G/L Account Balance to Budget
- G/L Balance to Budget
- G/L Account Categories

And then there is the actual system reports!

- Export to Excel
- Saved Views
- Profiles for depts
- Excel Reports
- Analyse Mode
- Financial Statements
- Financial Reports/ Account Schedules
- Analysis Views
- Sales Analysis Reports

It’s not just about actual reports…

- Role Centre parts
- Role Centre charts
- My Customers etc.
- Statistics Screens
- Company Hub

Can your users do the basics?

System reporting tools working out of the box (or very nearly)

It’s not just about actual reports…

Tools built in the Chart of Accounts

- Receivables/Payables
- Chart of Accounts Overview
- G/L Account Balance
- G/L Balance
- G/L Balance by Dimension
- G/L Account Balance to Budget
- G/L Balance to Budget
- G/L Account Categories

And then there is the actual system reports!

It’s not just about actual reports…

System reporting features
requiring some setup / knowledge

- Export to Excel
- Saved Views
- Profiles for depts
- Excel Reports
- Analyse Mode
- Financial Statements
- Financial Reports (Account Schedules)
- Analysis Views
- Sales Analysis Reports

And then we have the actual system reports

- <u>Four ways to find the reports</u>
  - ❑Search (‘Tell Me’)
  - ❑Role Centre (your home screen)
  - ❑Role Explorer (Departments!)
  - ❑List/Card page specific
- New ways to interact with the reports

Dynamics 365 Business Central

Environment: Production

MA

Training | Finance | Cash Management | Sales | Purchasing | Shopify

Customers | Vendors | Items | Bank Accounts | Chart of Accounts

Headline

Actions

+ Sales Quote | + Sales Invoice | + Purchase Order | Find entries... | New | Reports

+ Sales Order | + Purchase Quote | + Purchase Invoice | Search in data... | Payments | Excel Reports

Insights

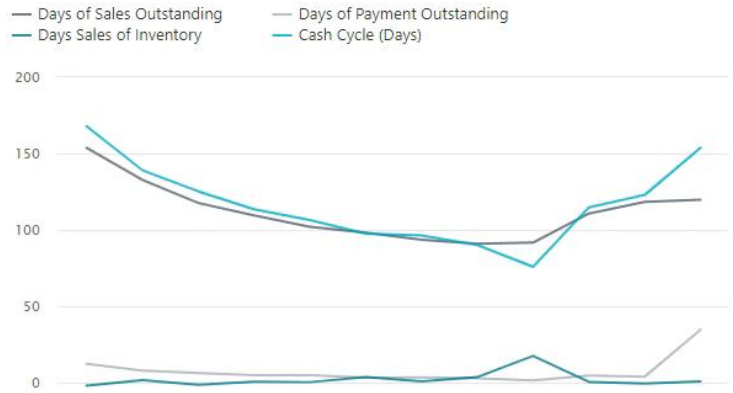
Report Inbox

Description	Created Date-Time ↓	Output Type

(There is nothing to show in this view)

Business Performance

Cash Cycle | View by Month



Activities

Sales This Month
£1,237

Overdue Sales Invoice Amount
£39,754

Overdue Purch. Invoice Amount
£35,196

User Tasks

My User Tasks

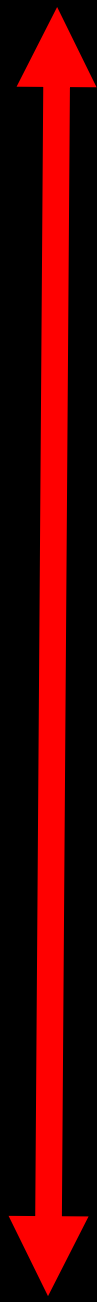
Pending User Tasks
0

Sliding scale of involvement

- Maximise your use of built in system tools to get best value for money (and time)

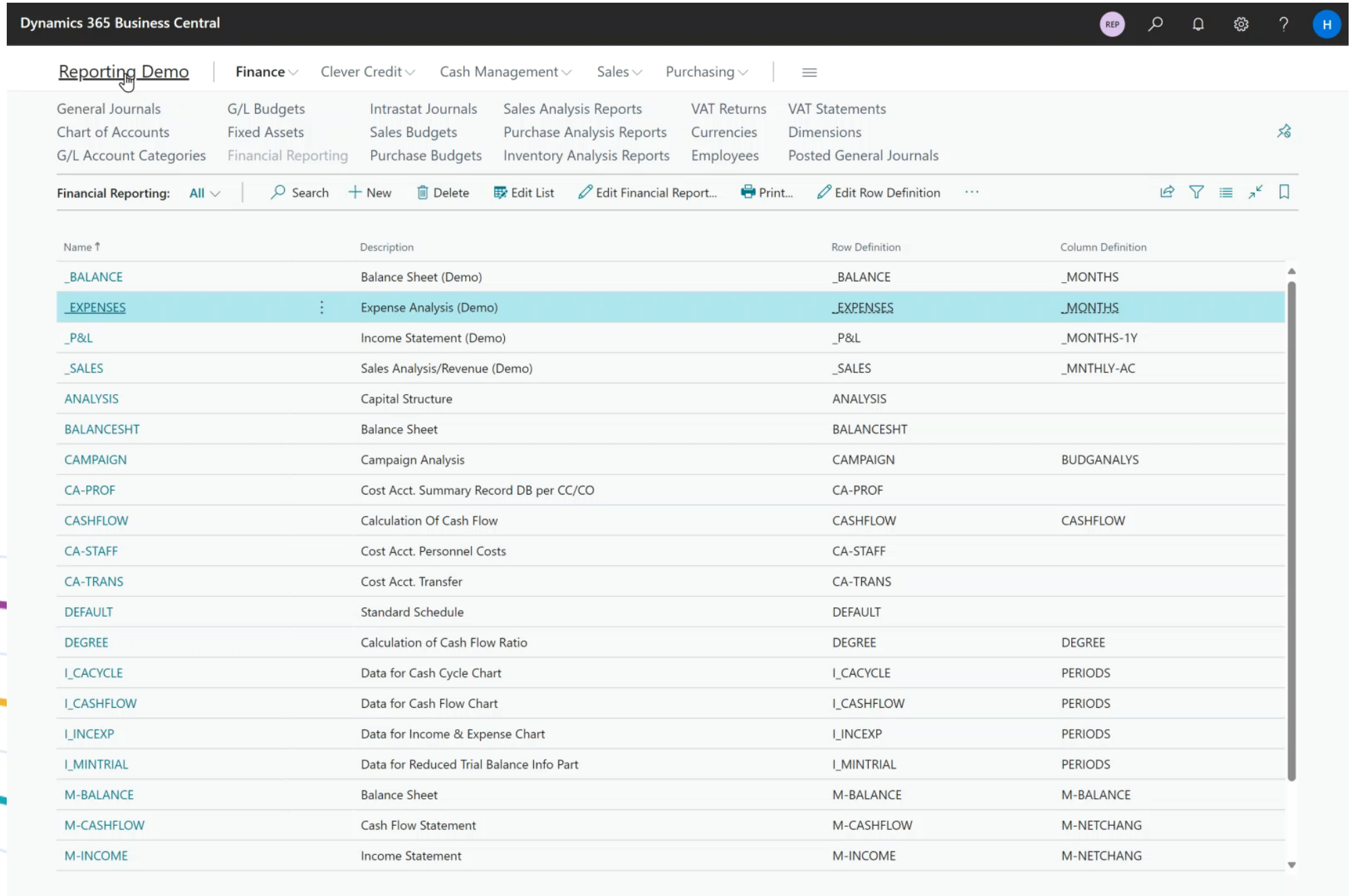
- Then, look at custom reports and external reporting tools like Jet Reports, Cosmos or Power BI

- Filtering
- Open in Excel (Export to Excel)
- Statistics screens
- Saved Views
- Standard system reports
- **Saved Views etc. as part of a custom Role Centre**
- Analyse Mode
- Excel reports
- Scheduling delivery of system reports
- Account Schedules / Financial Reporting
- Analysis Views
- Specialist module reports (G/L Budgets, Cashflow Forecast)



Account Schedules / Financial Reporting

- Your tool to create bespoke financial reports
- Rows determine *what* to show, Columns determine *how*
- Very powerful
- Combine with Analysis Views
- Varied data sources (G/L entries, G/L Budget Entries, Cash Flow Forecast Entries)
- Conditional show/hide and rounding options


Dynamics 365 Business Central
Reporting Demo
Finance
Clever Credit
Cash Management
Sales
Purchasing
General Journals
Chart of Accounts
G/L Account Categories
G/L Budgets
Fixed Assets
Financial Reporting
Intrastat Journals
Sales Budgets
Purchase Budgets
Sales Analysis Reports
Purchase Analysis Reports
Inventory Analysis Reports
VAT Returns
Currencies
Employees
VAT Statements
Dimensions
Posted General Journals
Financial Reporting: All
Search
New
Delete
Edit List
Edit Financial Report...
Print...
Edit Row Definition
Name
Description
Row Definition
Column Definition
_BALANCE
Balance Sheet (Demo)
_BALANCE
_MONTHS
_EXPENSES
Expense Analysis (Demo)
_EXPENSES
_MONTHS
_P&L
Income Statement (Demo)
_P&L
_MONTHS-1Y
_SALES
Sales Analysis/Revenue (Demo)
_SALES
_MNTHLY-AC
ANALYSIS
Capital Structure
ANALYSIS
BALANCESHT
Balance Sheet
BALANCESHT
CAMPAIGN
Campaign Analysis
CAMPAIGN
BUDGANALYS
CA-PROF
Cost Acct. Summary Record DB per CC/CO
CA-PROF
CASHFLOW
Calculation Of Cash Flow
CASHFLOW
CASHFLOW
CA-STAFF
Cost Acct. Personnel Costs
CA-STAFF
CA-TRANS
Cost Acct. Transfer
CA-TRANS
DEFAULT
Standard Schedule
DEFAULT
DEGREE
Calculation of Cash Flow Ratio
DEGREE
DEGREE
I_CACYCLE
Data for Cash Cycle Chart
I_CACYCLE
PERIODS
I_CASHFLOW
Data for Cash Flow Chart
I_CASHFLOW
PERIODS
I_INCEXP
Data for Income & Expense Chart
I_INCEXP
PERIODS
I_MINTRIAL
Data for Reduced Trial Balance Info Part
I_MINTRIAL
PERIODS
M-BALANCE
Balance Sheet
M-BALANCE
M-BALANCE
M-CASHFLOW
Cash Flow Statement
M-CASHFLOW
M-NETCHANG
M-INCOME
Income Statement
M-INCOME
M-NETCHANG

Row Definition | Work Date: 11/09/2022

Saved

Name _EXPENSES

Manage Home Insert

Outdent Indent

Row No.	Description	Totalling Type	Totalling	Department Code Totalling	Project Code Totalling	Row Type	Amount Type	Show Opp... Sign	Show	Bold	Italic	Unc
8110	Cleaning	Posting Ac...	8110			Net Change	Net Amount		Yes			
8120	Electricity and Heating	Posting Ac...	8120			Net Change	Net Amount		Yes			
8130	Repairs and Maintenance	Posting Ac...	8130			Net Change	Net Amount		Yes			
8210	Office Supplies	Posting Ac...	8210			Net Change	Net Amount		Yes			
8230	Phone and Fax	Posting Ac...	8230			Net Change	Net Amount		Yes			
8240	Postage	Posting A	8240			Net Change	Net Amount		Yes			
8310	Software					Net Change	Net Amount		Yes			
8320	Consultant Services					Net Change	Net Amount		Yes			
8330	Other Computer Expenses					Net Change	Net Amount		Yes			
8410	Advertising					Net Change	Net Amount		Yes			
8420	Entertainment and PR					Net Change	Net Amount		Yes			
8430	Travel					Net Change	Net Amount		Yes			
8450	Delivery Expenses	Posting Ac...	8450			Net Change	Net Amount		Yes			
8510	Fuel and Motor Oil	Posting Ac...	8510			Net Change	Net Amount		Yes			
8520	Registration Fees	Posting Ac...	8520			Net Change	Net Amount		Yes			
8530	Repairs and Maintenance	Posting Ac...	8530			Net Change	Net Amount		Yes			
8610	Cash Discrepancies	Posting Ac...	8610			Net Change	Net Amount		Yes			
8620	Bad Debt Expenses	Posting Ac...	8620			Net Change	Net Amount		Yes			
8630	Legal and Accounting Servi...	Posting Ac...	8630			Net Change	Net Amount		Yes			
8640	Miscellaneous	Posting Ac...	8640			Net Change	Net Amount		Yes			
8710	Wages	Posting Ac...	8710			Net Change	Net Amount		Yes			
8720	Salaries	Posting Ac...	8720			Net Change	Net Amount		Yes			

Posting Accounts
Total Accounts
Formula
Set Base For Percent
Cost Type
Cost Type Total
Cash Flow Entry Accounts
Cash Flow Total Accounts
Account Category

tecman

Column Definition | Work Date: 11/09/2022

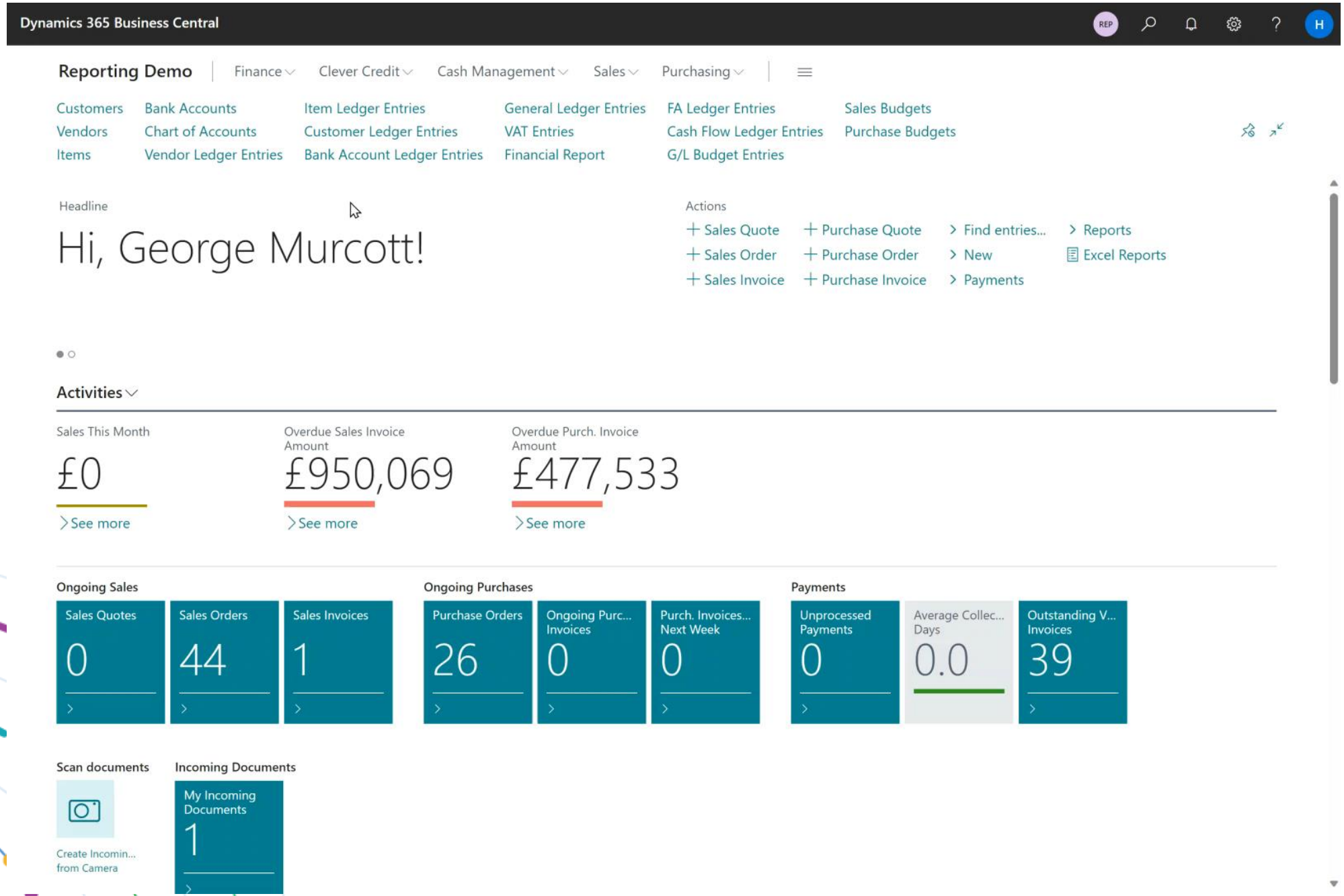
Saved

Name _MNTHLY-AC

Manage Copy Column Layout

Column No.	Column Header	Column Type	Ledger Entry Type	Amount Type	Budget Name	Formula	Show Opp... Sign	Comparison Date Formula	Comparison Period Formula	Show	Rounding Factor
010	Month(Actual)(£)	Net Change	Entries	Net Amount			☐		FY	Always	1
015	Month (Budget)	Net Change	Budget Entries	Net Amount			☐		FY	Always	1
020	Month Last Year	Net Change	Entries	Net Amount			☐		-1FY	Always	1
025	Var Budget %	Formula	Budget Entries	Net Amount		((010-015)/015)*100	☐			Always	1
030	Var LY %	Formula	Entries	Net Amount		((010-020)/020)*100	☐			Always	1
035	Var Bud Amnt £	Formula	Budget Entries	Net Amount		010-015	☐			Always	1
040	Var LY Amnt £	Formula	Entries	Net Amount		010-020	☐			Always	1
045	YTD Actual	Year to Date	Entries	Net Amount			☐		FY	Always	1
050	YTD Budget	Year to Date	Budget Entries	Net Amount			☐		FY	Always	1
055	YTD Last Yr	Year to Date	Entries	Net Amount			☐		-1FY	Always	1
060	Var Budget %	Formula	Entries	Net Amount		((045-050)/050)*100	☐			Always	1
065	Var Last Yr %	Formula	Entries	Net Amount		((045-055)/050)*100	☐			Always	1
070	Var Budget Amnt	Formula	Entries	Net Amount		045-050	☐			Always	1
075	Var Last Yr Amnt	Formula	Entries	Net Amount		045-055	☐			Always	1

None
1
1000
1000000
1000


Dynamics 365 Business Central
REP
H
Reporting Demo
Finance
Clever Credit
Cash Management
Sales
Purchasing
Customers
Vendors
Items
Bank Accounts
Chart of Accounts
Vendor Ledger Entries
Item Ledger Entries
Customer Ledger Entries
Bank Account Ledger Entries
General Ledger Entries
VAT Entries
Financial Report
FA Ledger Entries
Cash Flow Ledger Entries
G/L Budget Entries
Sales Budgets
Purchase Budgets
Headline
Hi, George Murcott!
Actions
Sales Quote
Sales Order
Sales Invoice
Purchase Quote
Purchase Order
Purchase Invoice
Find entries...
New
Payments
Reports
Excel Reports
Activities
Sales This Month
£0
See more
Overdue Sales Invoice Amount
£950,069
See more
Overdue Purch. Invoice Amount
£477,533
See more
Ongoing Sales
Sales Quotes
0
Sales Orders
44
Sales Invoices
1
Ongoing Purchases
Purchase Orders
26
Ongoing Purc... Invoices
0
Purch. Invoices... Next Week
0
Payments
Unprocessed Payments
0
Average Collec... Days
0.0
Outstanding V... Invoices
39
Scan documents
Create Incomin... from Camera
Incoming Documents
My Incoming Documents
1

Analysis Mode / Analyse function

- Work in BC like you work in Excel
- Totals in lists!
- Pivot data
- Export data as its seen on the page

Customers: All | Search | Analyse | cust balances | Totals | Pivot Salesperson | Analysis 4

No.	Name	Salesperson...	Credit Limit (LCY)	Balance (LCY)
10000	Adatum Corporation PLC	HR	10,000.00	0.00
20000	Trey Research	HR	10,000.00	2,251.80
30000	School of Fine Art	JO	20,000.00	32,644.30
40000	Alpine Ski House	HR	50,000.00	2,617.50
50000	Relecloud	JO	10,000.00	6,491.88
			100,000.00	44,005.48

Pivot Mode

Search...

Columns

- No.
- Name
- Salesperson Code
- Credit Limit (LCY)
- Contact
- Allow Multiple Posting Grou
- Balance (LCY)
- Balance Due (LCY)
- Sales (LCY)
- Payments (LCY)
- Phone No.
- Responsibility Centre
- Location Code
- Coupled to Dataverse

Analysis Filters

Row Groups

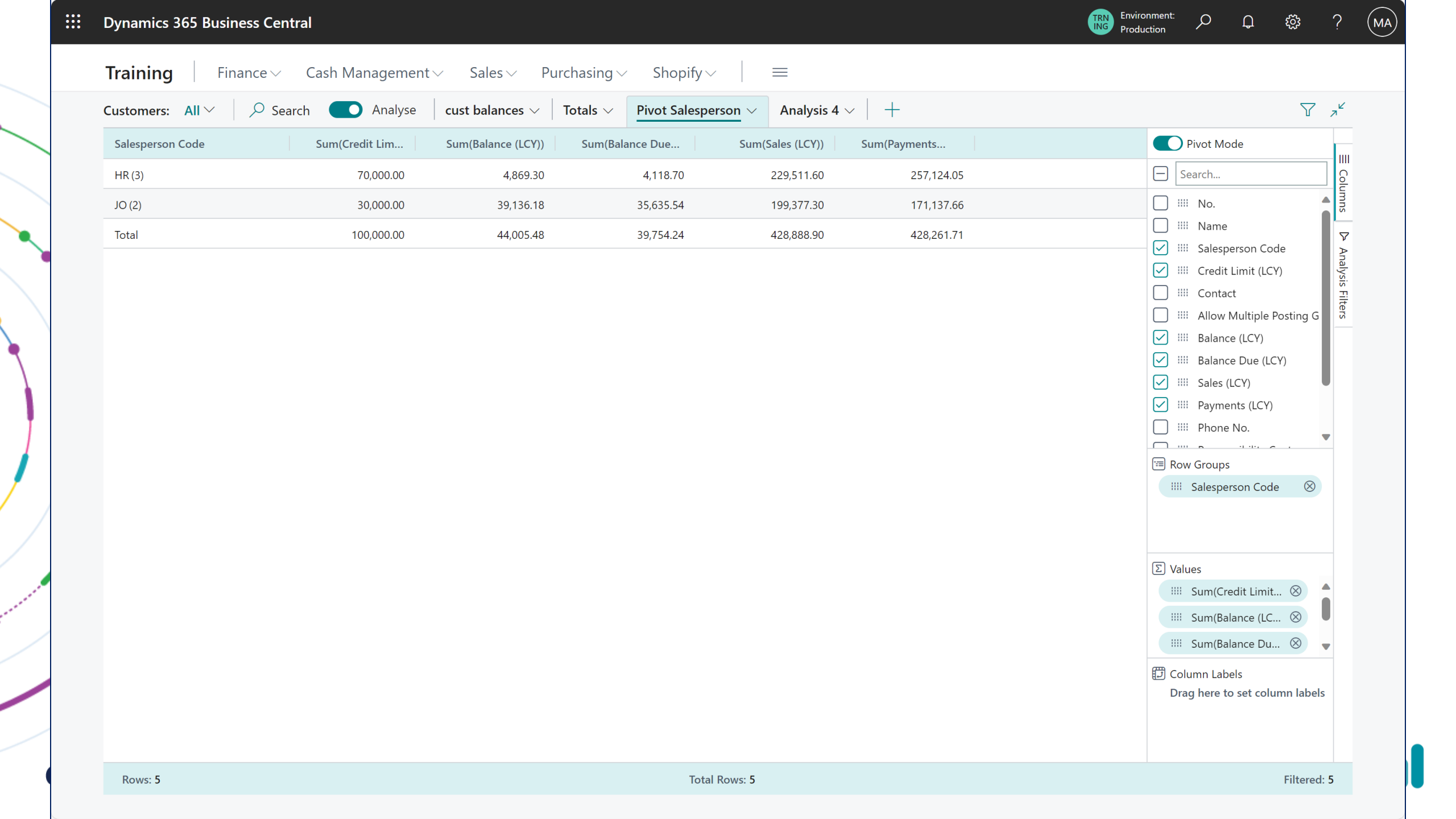
Drag here to set row groups

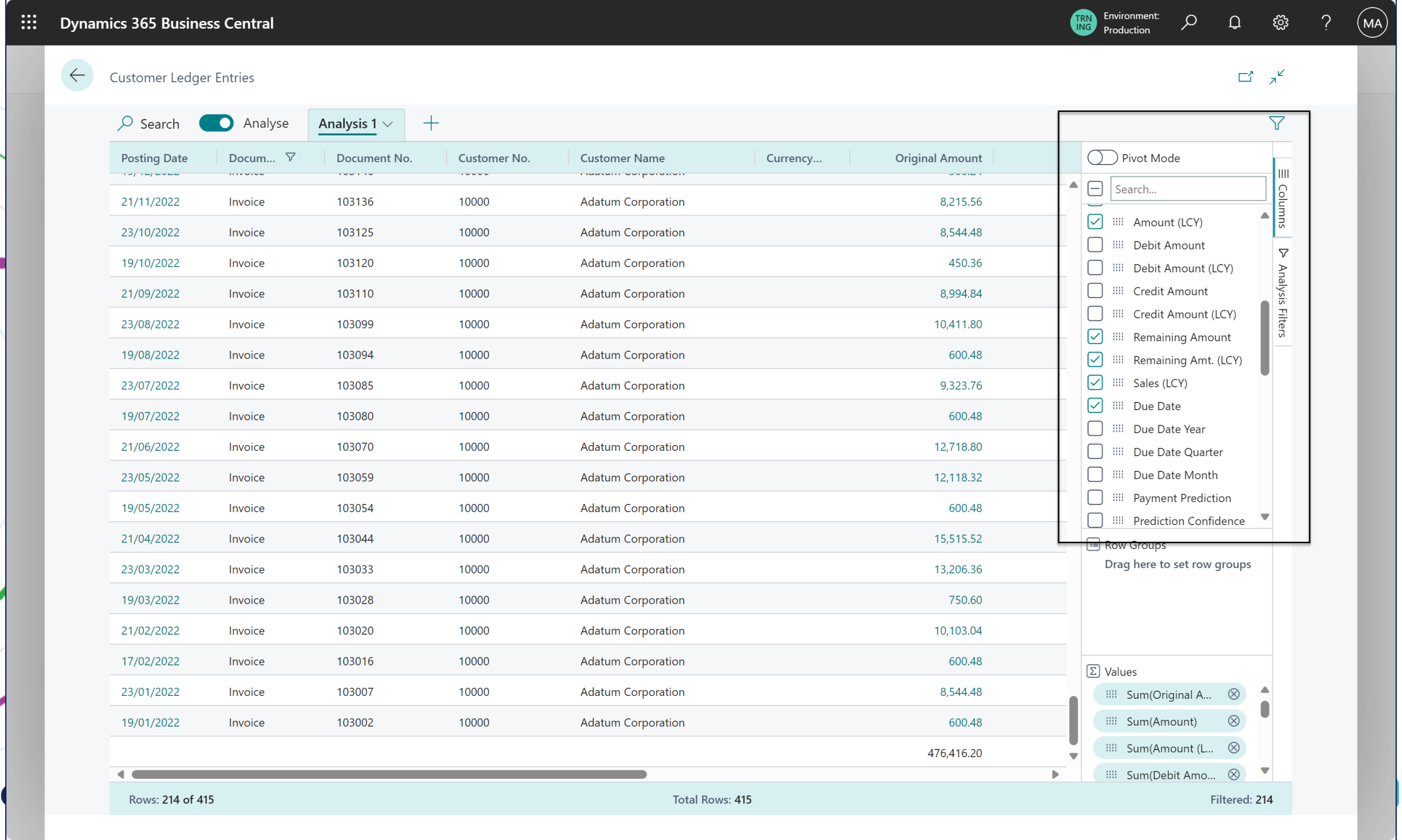
Values

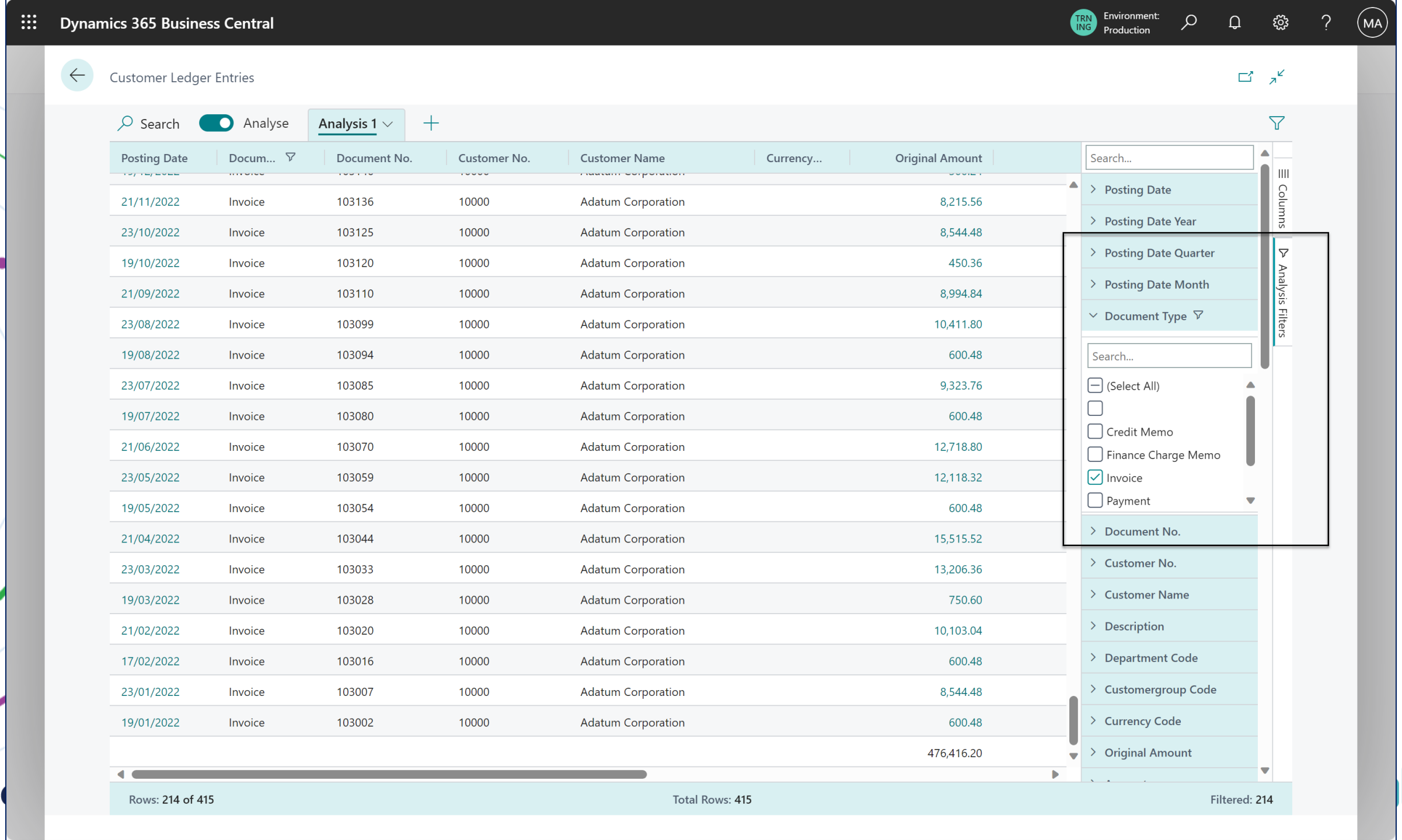
- Sum(Credit Limit (L...
- Sum(Balance (LCY))

Rows: 5

Total Rows: 5


Dynamics 365 Business Central
TRN ING
Environment: Production
MA
Training
Finance
Cash Management
Sales
Purchasing
Shopify
Customers: All
Search
Analyse
cust balances
Totals
Pivot Salesperson
Analysis 4
Salesperson Code
Sum(Credit Lim...
Sum(Balance (LCY))
Sum(Balance Due...
Sum(Sales (LCY))
Sum(Payments...
HR (3) 70,000.00 4,869.30 4,118.70 229,511.60 257,124.05
JO (2) 30,000.00 39,136.18 35,635.54 199,377.30 171,137.66
Total 100,000.00 44,005.48 39,754.24 428,888.90 428,261.71
Pivot Mode
Search...
No.
Name
Salesperson Code
Credit Limit (LCY)
Contact
Allow Multiple Posting G
Balance (LCY)
Balance Due (LCY)
Sales (LCY)
Payments (LCY)
Phone No.
Columns
Analysis Filters
Row Groups
Salesperson Code
Values
Sum(Credit Limit...
Sum(Balance (LC...
Sum(Balance Du...
Column Labels
Drag here to set column labels
Rows: 5
Total Rows: 5
Filtered: 5


Dynamics 365 Business Central
TRN ING
Environment: Production
MA
Customer Ledger Entries
Search
Analyse
Analysis 1
Posting Date
Docum...
Document No.
Customer No.
Customer Name
Currency...
Original Amount
21/11/2022 Invoice 103136 10000 Adatum Corporation 8,215.56
23/10/2022 Invoice 103125 10000 Adatum Corporation 8,544.48
19/10/2022 Invoice 103120 10000 Adatum Corporation 450.36
21/09/2022 Invoice 103110 10000 Adatum Corporation 8,994.84
23/08/2022 Invoice 103099 10000 Adatum Corporation 10,411.80
19/08/2022 Invoice 103094 10000 Adatum Corporation 600.48
23/07/2022 Invoice 103085 10000 Adatum Corporation 9,323.76
19/07/2022 Invoice 103080 10000 Adatum Corporation 600.48
21/06/2022 Invoice 103070 10000 Adatum Corporation 12,718.80
23/05/2022 Invoice 103059 10000 Adatum Corporation 12,118.32
19/05/2022 Invoice 103054 10000 Adatum Corporation 600.48
21/04/2022 Invoice 103044 10000 Adatum Corporation 15,515.52
23/03/2022 Invoice 103033 10000 Adatum Corporation 13,206.36
19/03/2022 Invoice 103028 10000 Adatum Corporation 750.60
21/02/2022 Invoice 103020 10000 Adatum Corporation 10,103.04
17/02/2022 Invoice 103016 10000 Adatum Corporation 600.48
23/01/2022 Invoice 103007 10000 Adatum Corporation 8,544.48
19/01/2022 Invoice 103002 10000 Adatum Corporation 600.48
476,416.20
Pivot Mode
Search...
Amount (LCY)
Debit Amount
Debit Amount (LCY)
Credit Amount
Credit Amount (LCY)
Remaining Amount
Remaining Amt. (LCY)
Sales (LCY)
Due Date
Due Date Year
Due Date Quarter
Due Date Month
Payment Prediction
Prediction Confidence
Columns
Analysis Filters
Row Groups
Drag here to set row groups
Values
Sum(Original A...
Sum(Amount)
Sum(Amount (L...
Sum(Debit Amo...
Rows: 214 of 415
Total Rows: 415
Filtered: 214


Dynamics 365 Business Central
TRN ING
Environment: Production
MA
Customer Ledger Entries
Search
Analyse
Analysis 1
Posting Date
Docum...
Document No.
Customer No.
Customer Name
Currency...
Original Amount
21/11/2022 Invoice 103136 10000 Adatum Corporation 8,215.56
23/10/2022 Invoice 103125 10000 Adatum Corporation 8,544.48
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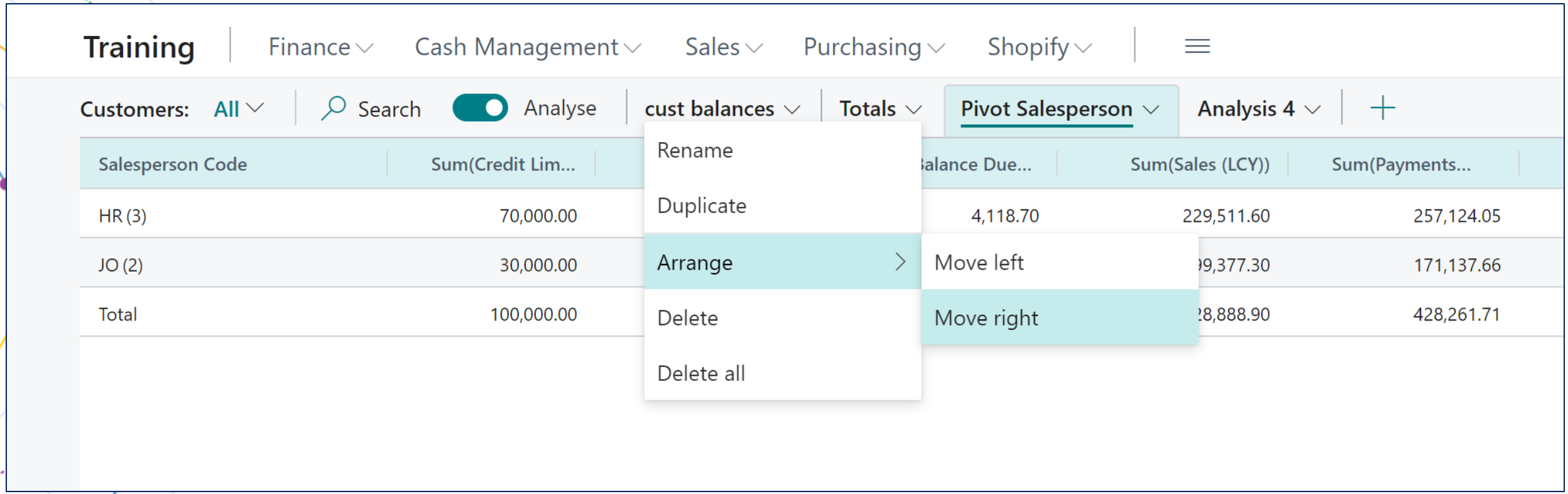
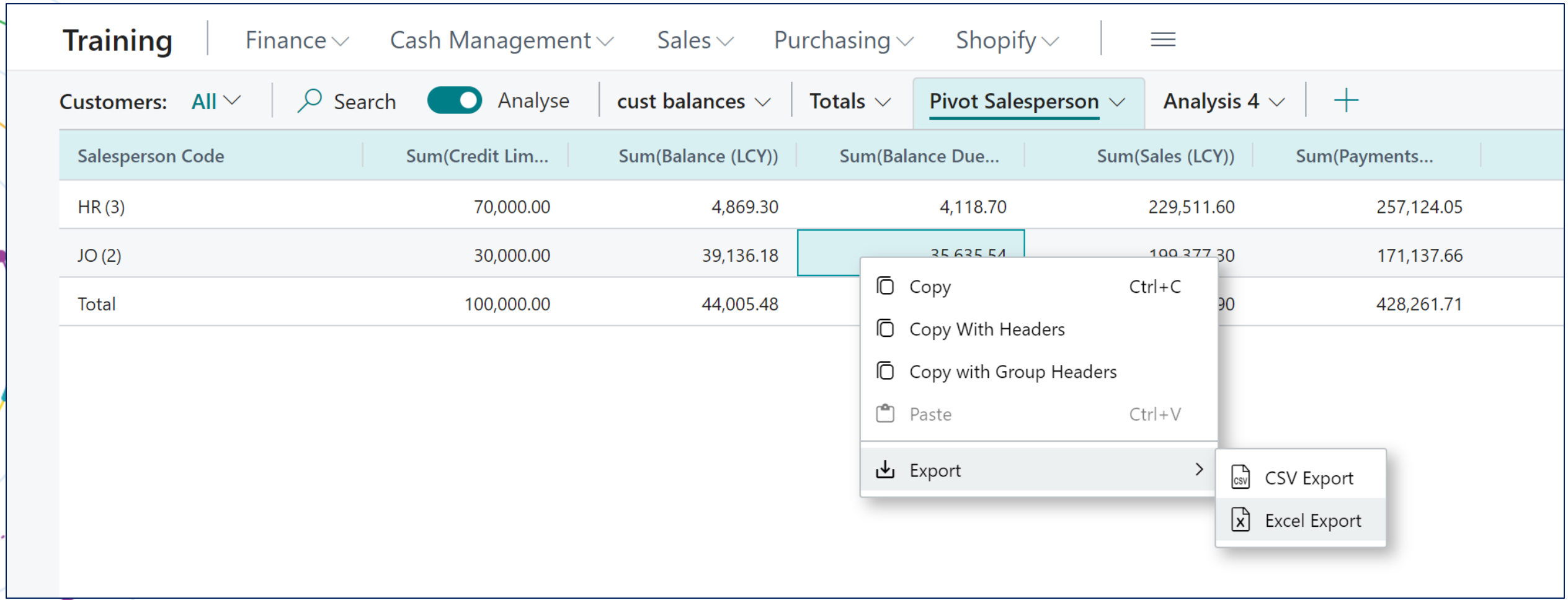
23/01/2022 Invoice 103007 10000 Adatum Corporation 8,544.48
19/01/2022 Invoice 103002 10000 Adatum Corporation 600.48
476,416.20
Search...
Posting Date
Posting Date Year
Posting Date Quarter
Posting Date Month
Document Type
Search...
(Select All)
Credit Memo
Finance Charge Memo
Invoice
Payment
Document No.
Customer No.
Customer Name
Description
Department Code
Customergroup Code
Currency Code
Original Amount
Columns
Analysis Filters
Rows: 214 of 415
Total Rows: 415
Filtered: 214


Training
Finance
Cash Management
Sales
Purchasing
Shopify
Customers: All
Search
Analyse
cust balances
Totals
Pivot Salesperson
Analysis 4
Rename
Duplicate
Arrange
Delete
Delete all
Move left
Move right
Salesperson Code
Sum(Credit Lim...
alance Due...
Sum(Sales (LCY))
Sum(Payments...
HR (3)
70,000.00
4,118.70
229,511.60
257,124.05
JO (2)
30,000.00
9,377.30
171,137.66
Total
100,000.00
8,888.90
428,261.71


Training
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Salesperson Code
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Sum(Balance Due...
Sum(Sales (LCY))
Sum(Payments...
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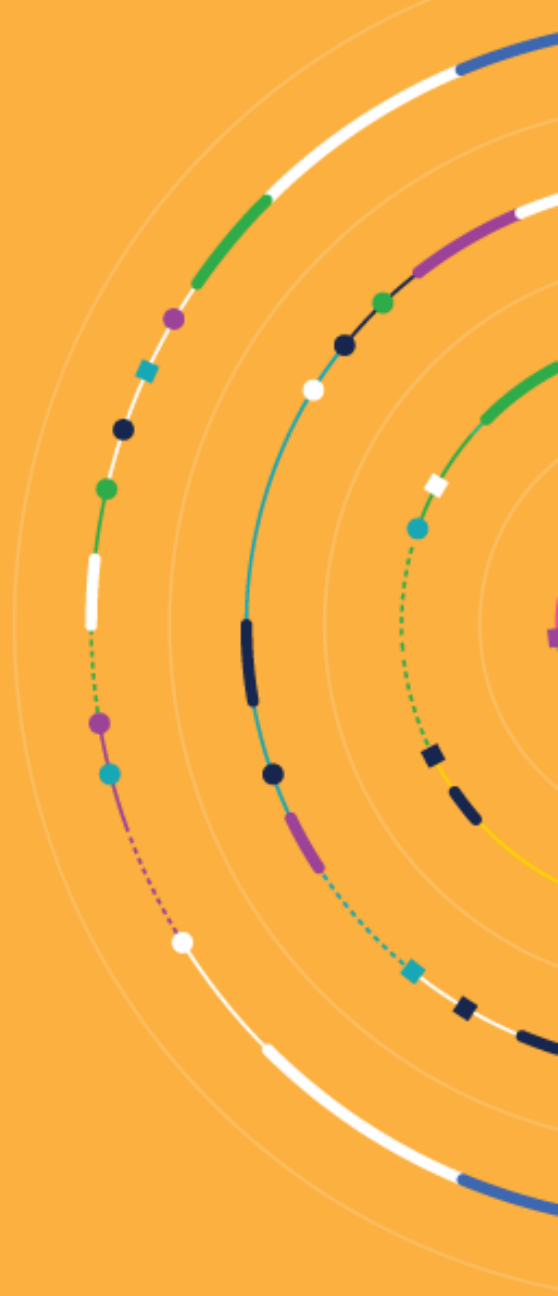
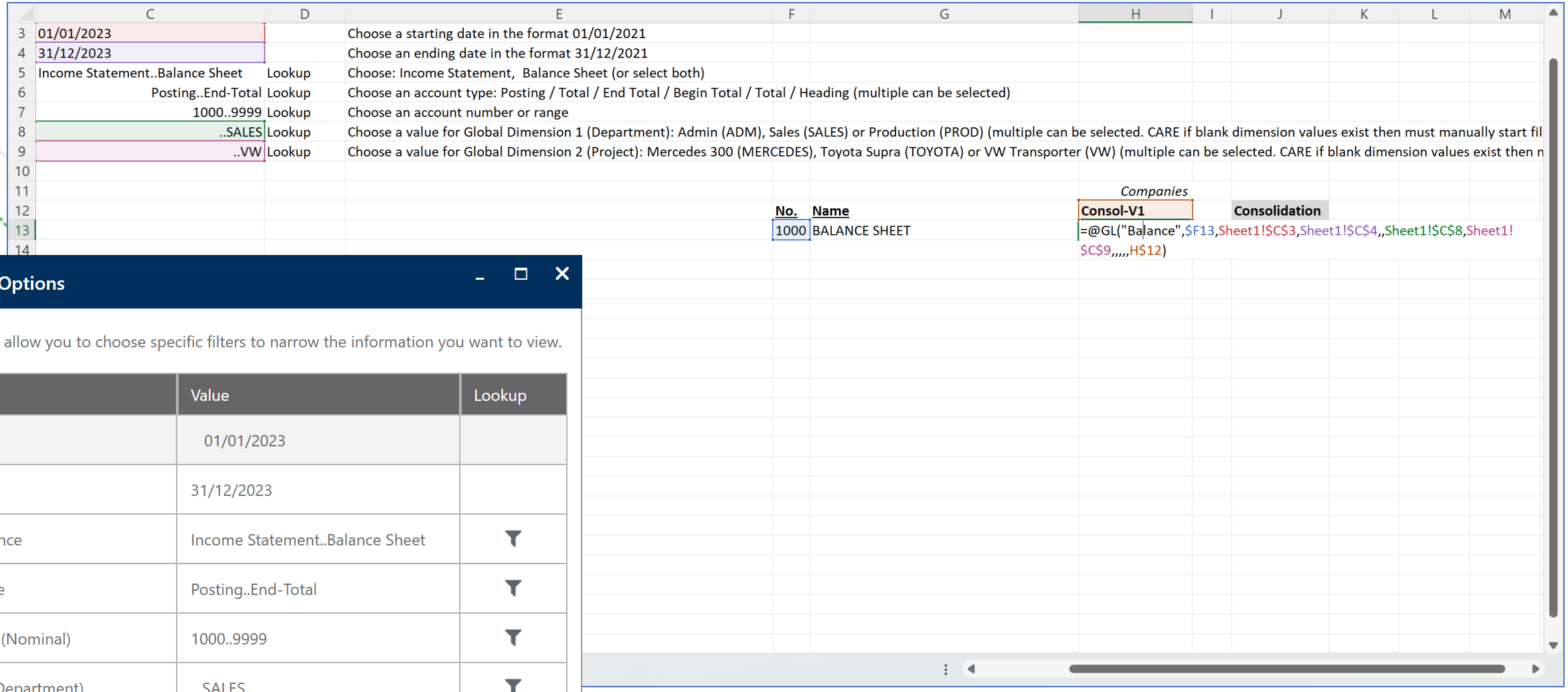
JO (2) 30,000.00 39,136.18 171,137.66
Total 100,000.00 44,005.48 428,261.71
Copy Ctrl+C
Copy With Headers
Copy with Group Headers
Paste Ctrl+V
Export
CSV Export
Excel Export

Going outside the (BC) ‘box’





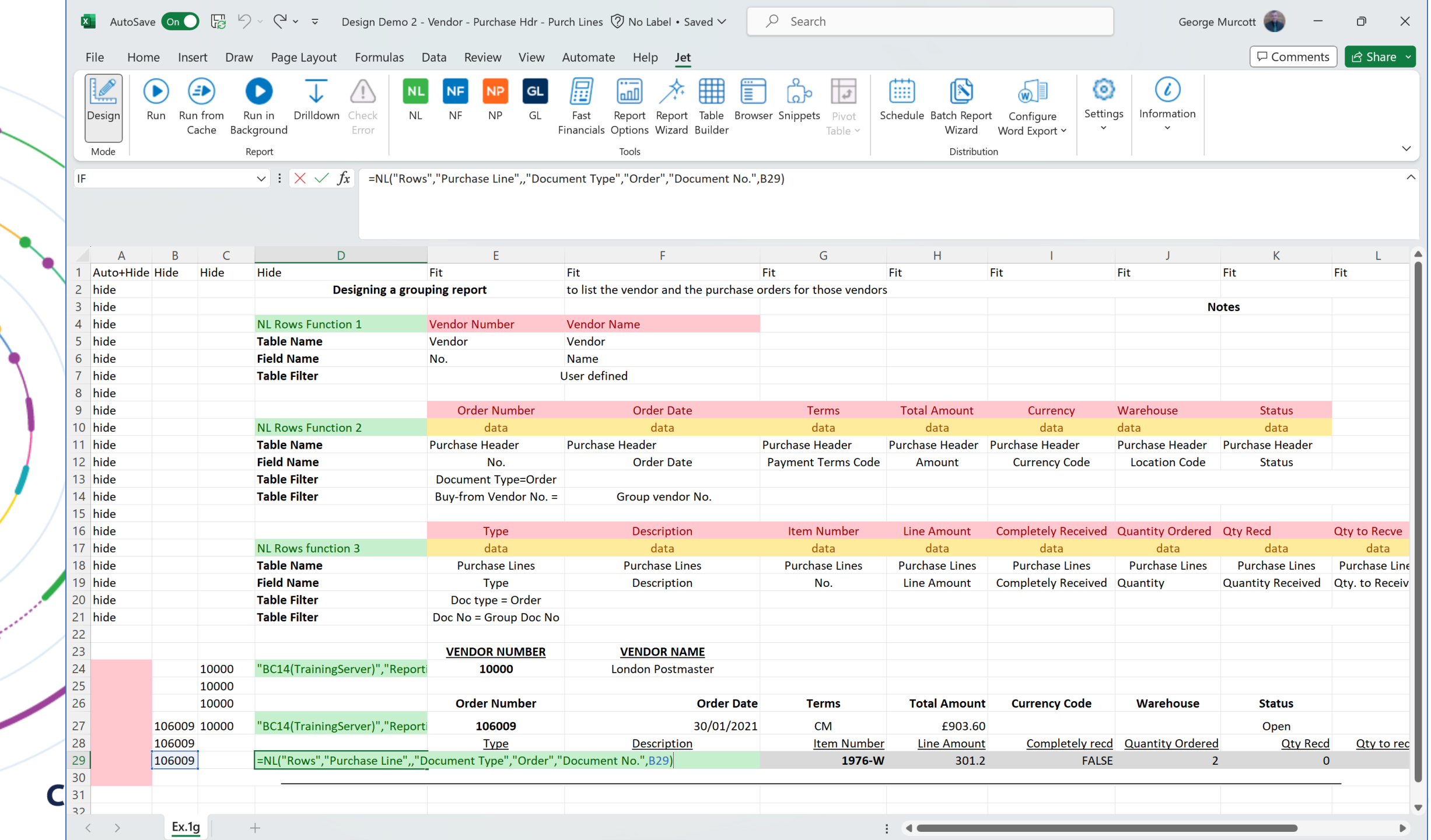
Report Options

Report options allow you to choose specific filters to narrow the information you want to view.

Title	Value	Lookup
StartDate	01/01/2023	
EndDate	31/12/2023	
Income/Balance	Income Statement..Balance Sheet	
Account Type	Posting..End-Total	
G/L Account (Nominal)	1000..9999	
Dimension (Department)	..SALES	
Dimension (Project)	..VW	

Run Cancel

tecman


AutoSave On
Design Demo 2 - Vendor - Purchase Hdr - Purch Lines
No Label • Saved
Search
George Murcott
File Home Insert Draw Page Layout Formulas Data Review View Automate Help Jet
Comments Share
Design Run Run from Cache Run in Background Drilldown Check Error
Mode Report
NL NF NP GL Fast Financials Report Options Report Wizard Table Builder Browser Snippets Pivot Table
Tools
Schedule Batch Report Wizard Configure Word Export
Distribution
Settings Information
IF
=NL("Rows","Purchase Line",,"Document Type","Order","Document No.",B29)
Designing a grouping report
to list the vendor and the purchase orders for those vendors
Notes
NL Rows Function 1
Vendor Number
Vendor Name
Table Name
Vendor
Vendor
Field Name
No.
Name
Table Filter
User defined
Order Number
Order Date
Terms
Total Amount
Currency
Warehouse
Status
NL Rows Function 2
data
Purchase Header
No.
Order Date
Payment Terms Code
Amount
Currency Code
Location Code
Status
Document Type=Order
Buy-from Vendor No. =
Group vendor No.
Type
Description
Item Number
Line Amount
Completely Received
Quantity Ordered
Qty Recd
Qty to Recve
NL Rows function 3
Purchase Lines
Type
Description
No.
Line Amount
Completely Received
Quantity
Quantity Received
Qty. to Receiv
Doc type = Order
Doc No = Group Doc No
VENDOR NUMBER
VENDOR NAME
10000
"BC14(TrainingServer)","Reporti
London Postmaster
Order Number
Order Date
Terms
Total Amount
Currency Code
Warehouse
Status
106009
30/01/2021
CM
£903.60
Open
Type
Description
Item Number
Line Amount
Completely recd
Quantity Ordered
Qty Recd
Qty to rec
1976-W
301.2
FALSE
2
0
Ex.1g

Ask a question about your data

Tecman Online - Technology Management YouTube channel

www.youtube.com/user/TecmanOnline/featured

Number of videos

465

Subscribers

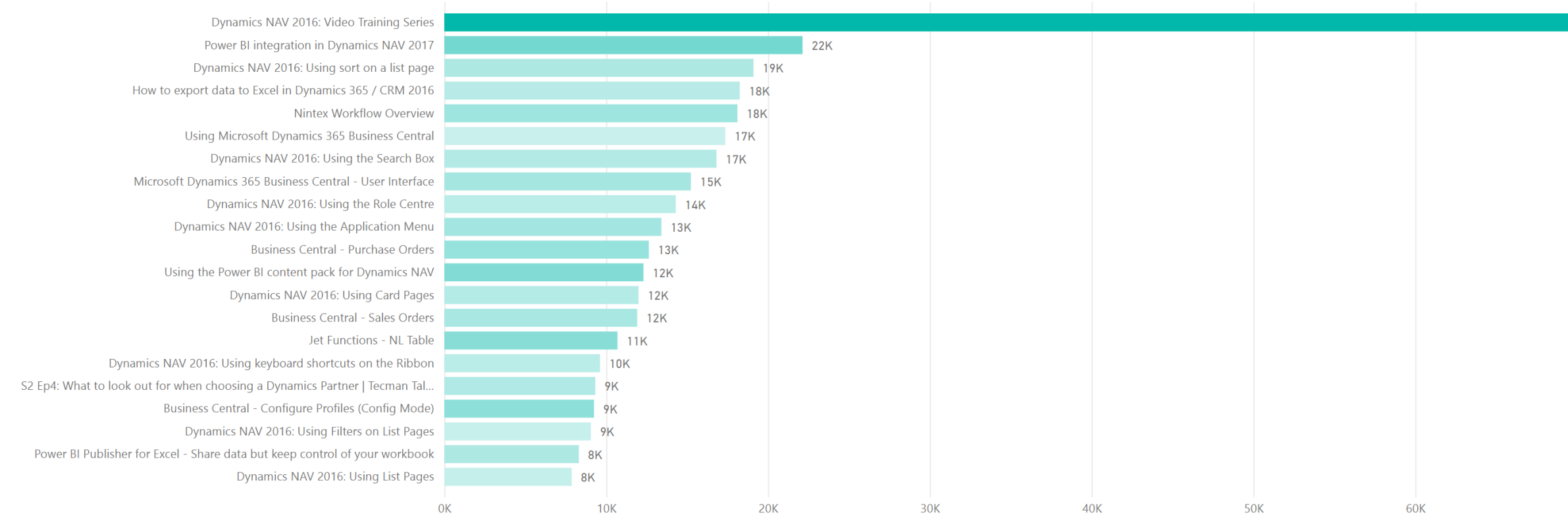
3290

Total views

792489

Views, Likes, Earliest DatePublished

BY TITLE



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...
Power BI

Ask a question about your data

Sales This Month

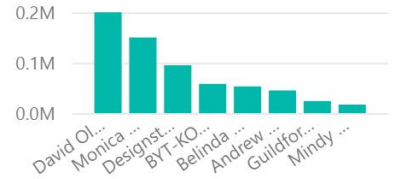
91.05M

Sales Orders Open

BY SALESPERSON

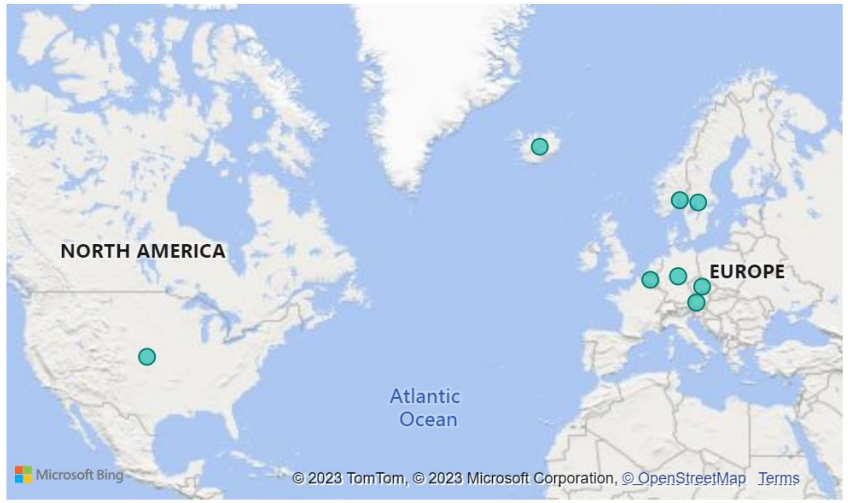
Opportunities Pipeline

BY CONTACT



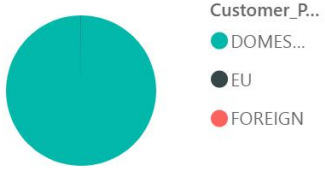
Profitability

BY COUNTRY



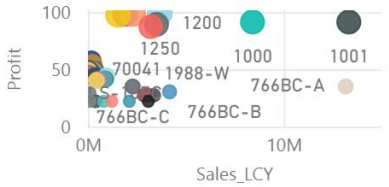
Sales This Month

BY CUSTOMER GROUP



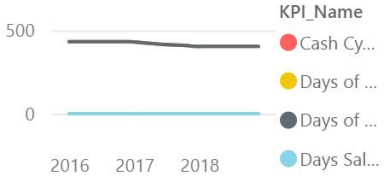
Item Sales Shares

Sales & Profit, Items



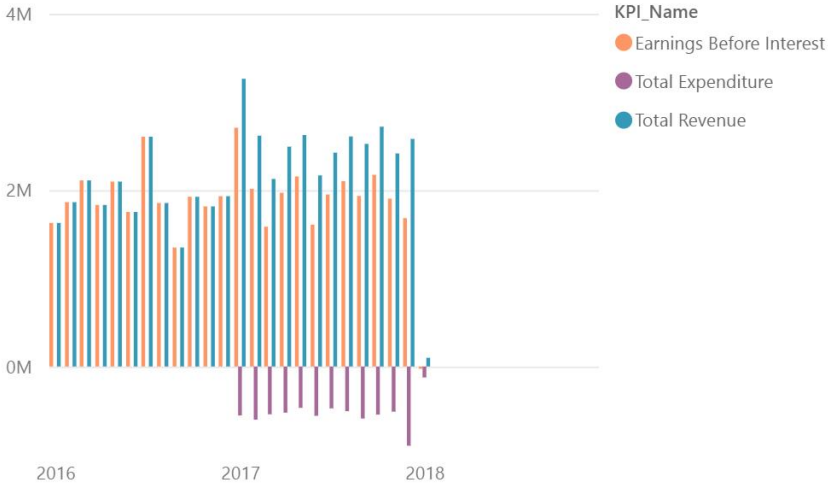
Cash Cycle Components

BY MONTH



Revenue & Expenses

BY MONTH



Trial Balance

BY MONTH

KPI_Code	KPI_Name	Net_Change_Actual
10	Total Revenue	53,407,842.77
20	Total Cost	-3,935,333.46
30	Gross Margin	49,472,509.31
40	Gross Margin %	2,225.26
50	Operating Expenses	2,963,736.61
60	Operating Margin	46,508,772.70
70	Operating Margin %	2,105.10
80	Other Expenses	2,599.61
90	Income before Interest and V...	46,506,173.09

Margins (%)

BY MONTH

Web Services

If you want to set up an OData connection, for performance and stability reasons consider using an API page instead. Don't show again | API documentation

Search | Analyse | New | Edit List | Delete | Reload | Download Metadata Document | More options

Object Type	Object ID	Object Name	Service Name	All Tena...	Publ...	OData V4 URL	SOAP URL
Page	6407	workflowGenJournalLines	workflowGenJournalLines			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
Page	6409	workflowItems	workflowItems			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
Page	6405	Purchase Document Line Entity	workflowPurchaseDocumentLines			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
Page	6404	workflowPurchaseDocuments	workflowPurchaseDocuments			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
Page	6403	Sales Document Line Entity	workflowSalesDocumentLines			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
Page	6402	workflowSalesDocuments	workflowSalesDocuments			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
Page	6410	workflowVendors	workflowVendors			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
Page	831	workflowWebhookSubscriptions	workflowWebhookSubscriptions			https://api.businesscentral.dyna...	https://api.businesscentral.dyna...
→ Query	264	Bank Account Ledger Entries	BankAccountLedgerEntries			https://api.businesscentral.dyna...	Not applicable
Query	262	Cust. Ledger Entries	Cust.LedgerEntries			https://api.businesscentral.dyna...	Not applicable
Query	260	Dimension Set Entries	DimensionSetEntries			https://api.businesscentral.dyna...	Not applicable
Query	267	FA Ledger Entries	FALedgerEntries			https://api.businesscentral.dyna...	Not applicable
Query	270	G/L Budget Entries	G/LBudgetEntries			https://api.businesscentral.dyna...	Not applicable
Query	261	G/L Entries	G/LEntries			https://api.businesscentral.dyna...	Not applicable
Query	265	Item Ledger Entries	ItemLedgerEntries			https://api.businesscentral.dyna...	Not applicable
Query	103	Item Sales and Profit	ItemSalesAndProfit			https://api.businesscentral.dyna...	Not applicable
Query	102	Item Sales by Customer	ItemSalesByCustomer			https://api.businesscentral.dyna...	Not applicable
Query	268	Job Ledger Entries	JobLedgerEntries			https://api.businesscentral.dyna...	Not applicable
Query	61	Power BI Cust. Item Ledg. Ent.	Power BI Cust. Item Ledg. Ent.			https://api.businesscentral.dyna...	Not applicable
Query	62	Power BI Cust. Ledger Entries	Power BI Cust. Ledger Entries			https://api.businesscentral.dyna...	Not applicable
Query	50	Power BI Customer List	Power BI Customer List			https://api.businesscentral.dyna...	Not applicable

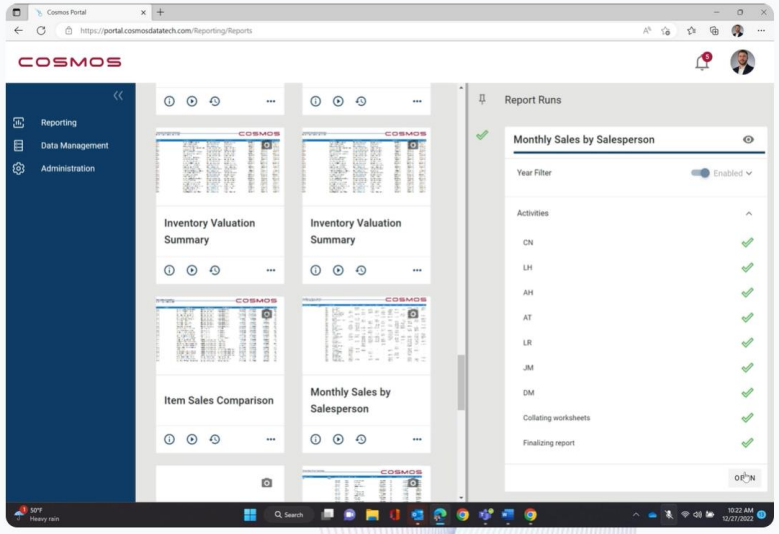
COSMOS Features Training Partners Company Support Contact Login

Make Report Creation Easier on Everyone

https://www.cosmosdatatech.com/features/reporting/

Remove the complexity of report design

Create and customize reports easily with the intuitive Cosmos Report Editor and 30 pre-built reports for Business Central.



Pull data no matter where it resides

Utilize optimized data to quickly build reports without worrying about the underlying data structure or having to link multiple tables and fields.

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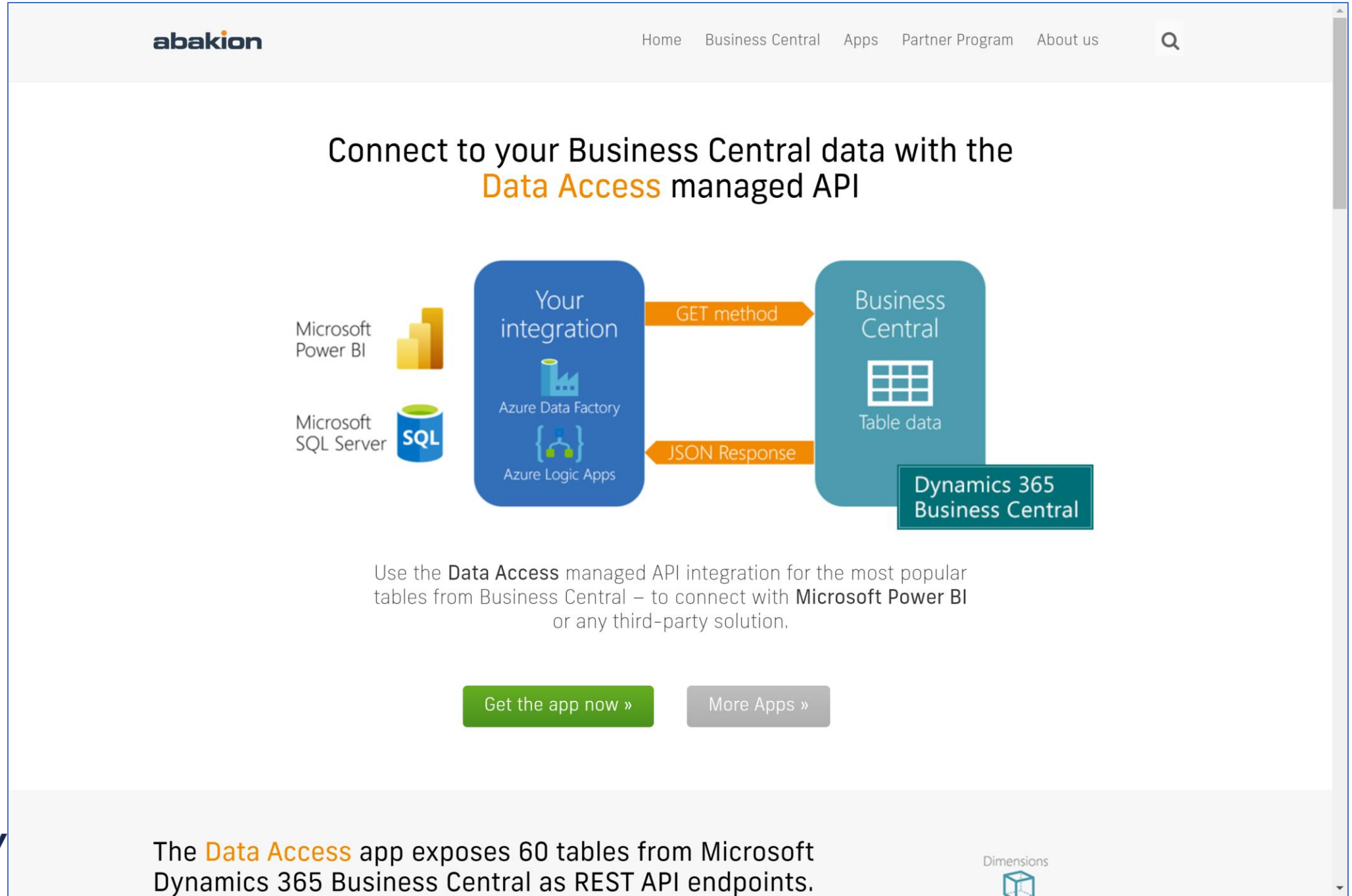
https://abakion.com/dynamics-365/apps/data-access/



CUSTOMER DAY

Old friends and new options

Jet Reports

+Simple, Excel skills
+Direct access to tables
+Long track record

-Not so suited to cloud
- Limited new product development
- Can hit performance issues with large data sets

Power BI

+Great visuals
+Easy distribution
+Low cost licence

- Are you a data specialist?
-Access to data not simple
-Can cause performance issues
-Multiple API pages, multiple versions of the truth?

New world options

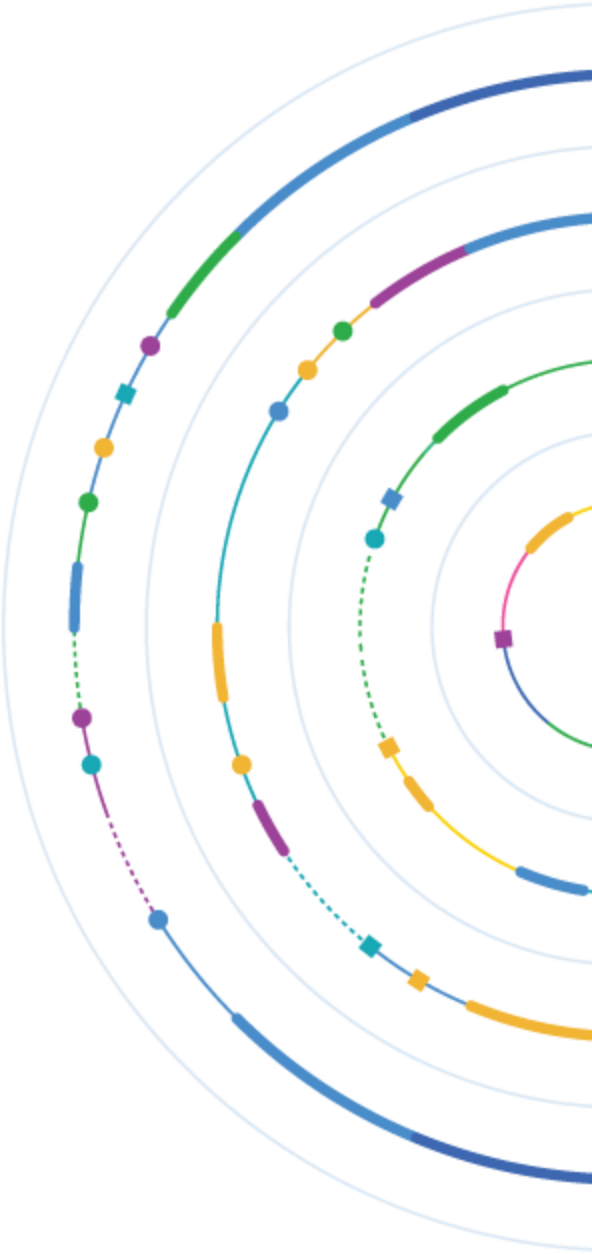
- Cosmos
- Abakion
- Other apps exist

+Azure Data Whse
+Single version of the truth
+No performance issues
+Give access to data, allow greater focus on the report
+Portal to control access and handle distribution

Will AI make a difference?

Microsoft has four AI solutions within BC so far:

- Cash Flow Forecast Azure AI ‘experiment’
- Late Payment Predictor
- Copilot – Marketing text
- Copilot – Bank reconciliation

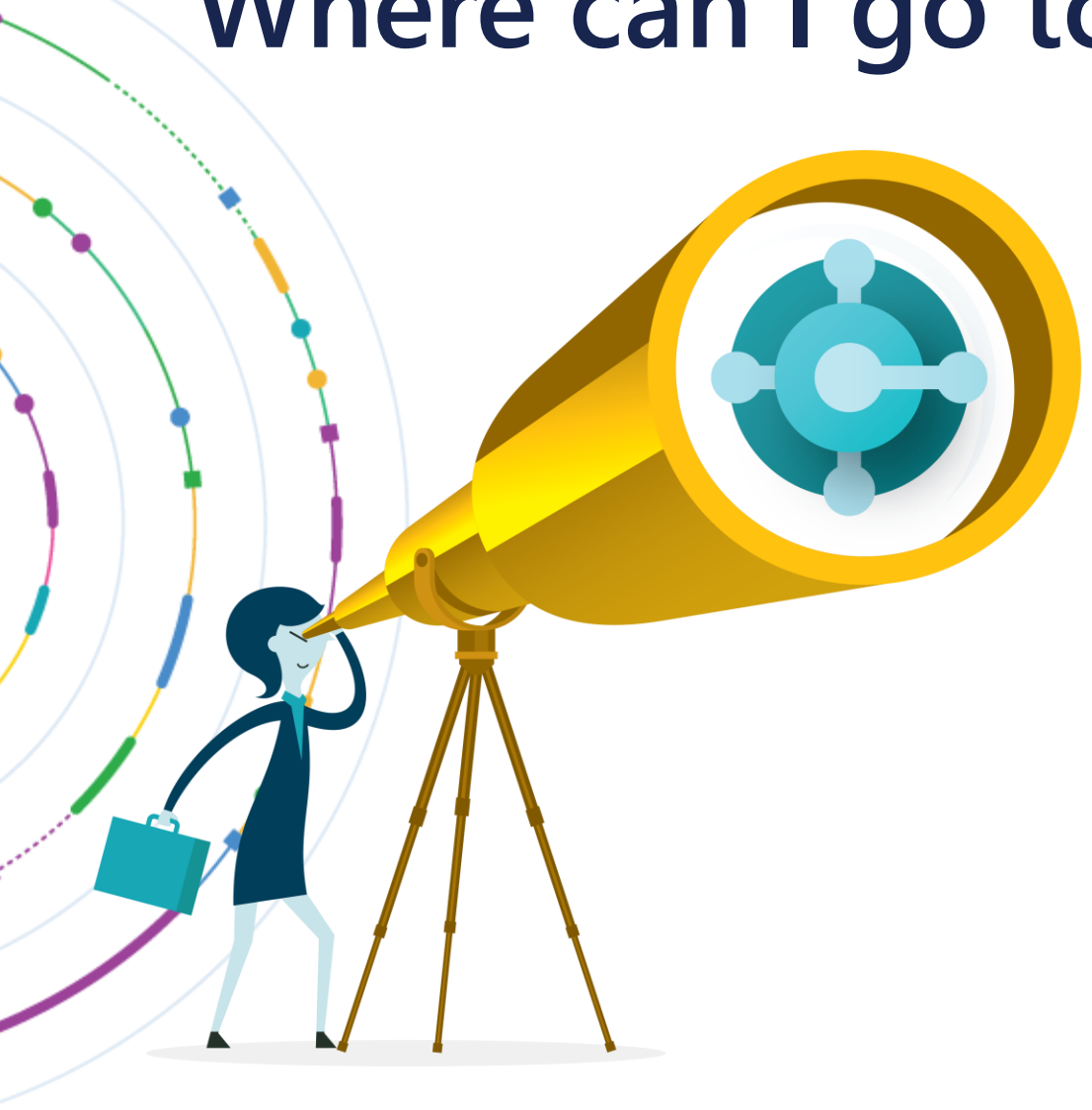


What's next in the product?

- New tools to write and publish queries in BC (no timescale yet)

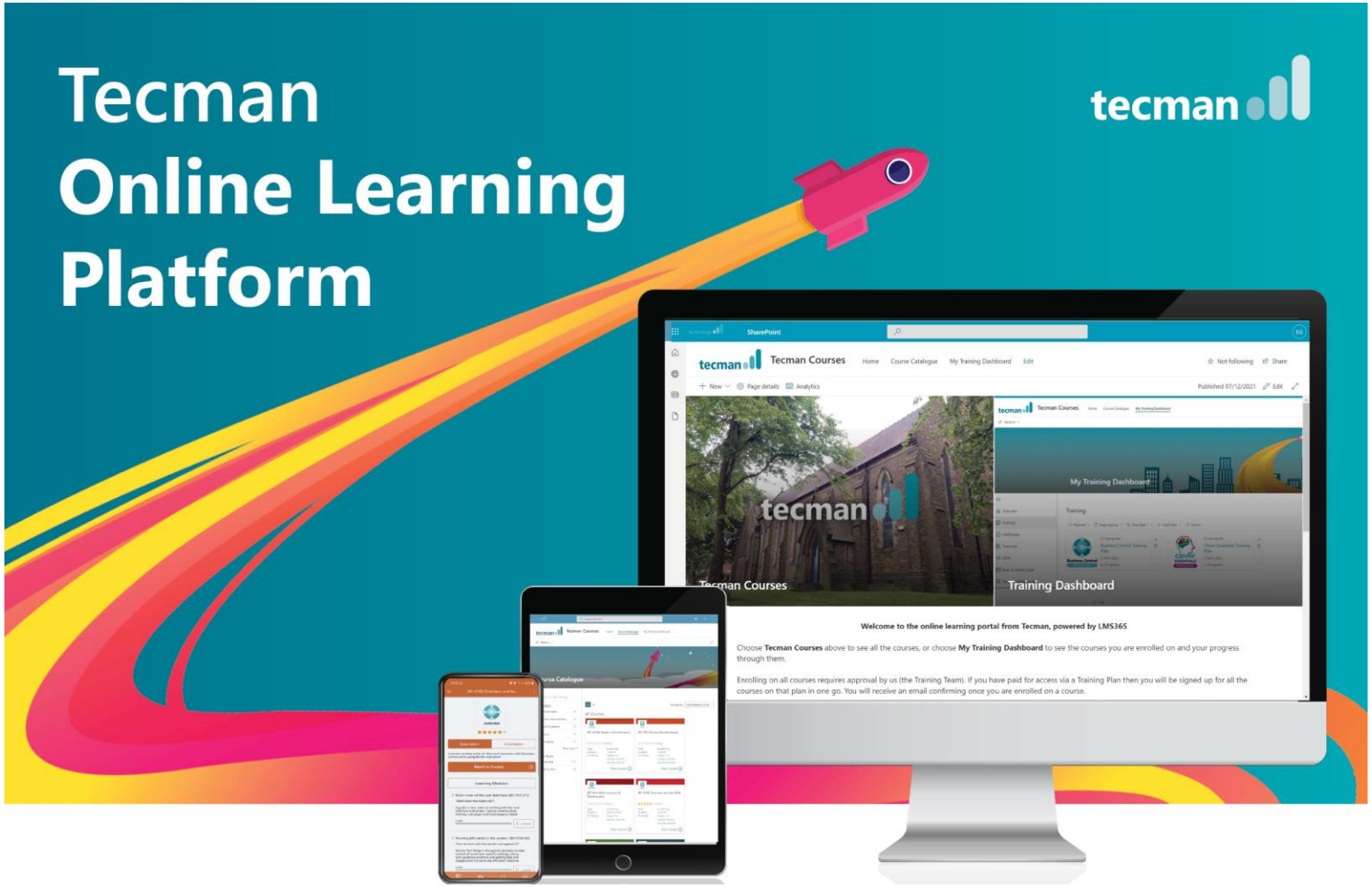
- Possible further development of Analyse function
  - Lift the 100,000 rows of data limitation
  - Allow the Analysis Tabs to be created in a Profile as Customisation, to allow easy delivery to end users

Where can I go to learn more



- Blog posts from the Tecman website also LinkedIn and other socials
- *Tecman Talks Dynamics* podcasts (reporting example from YouTube)
- Regular FREE customer webinars, recorded (video playlist available here)
- Tecman YouTube channel – multiple playlists covering both NAV and Business Central, full introduction playlists (20 -30 videos) (see next slide)
- Microsoft Docs and Microsoft Learn
- Formal training sessions, details on the website or ask your Customer Engagement Manager for the agendas
- *Remote*: Face-to-Face via Teams; Online Learning Platform
- *IRL*: Scheduled courses at Tecman or onsite with you

Tecman Online Learning Platform



https://www.tecman.co.uk/events-and-training/dynamics-learning

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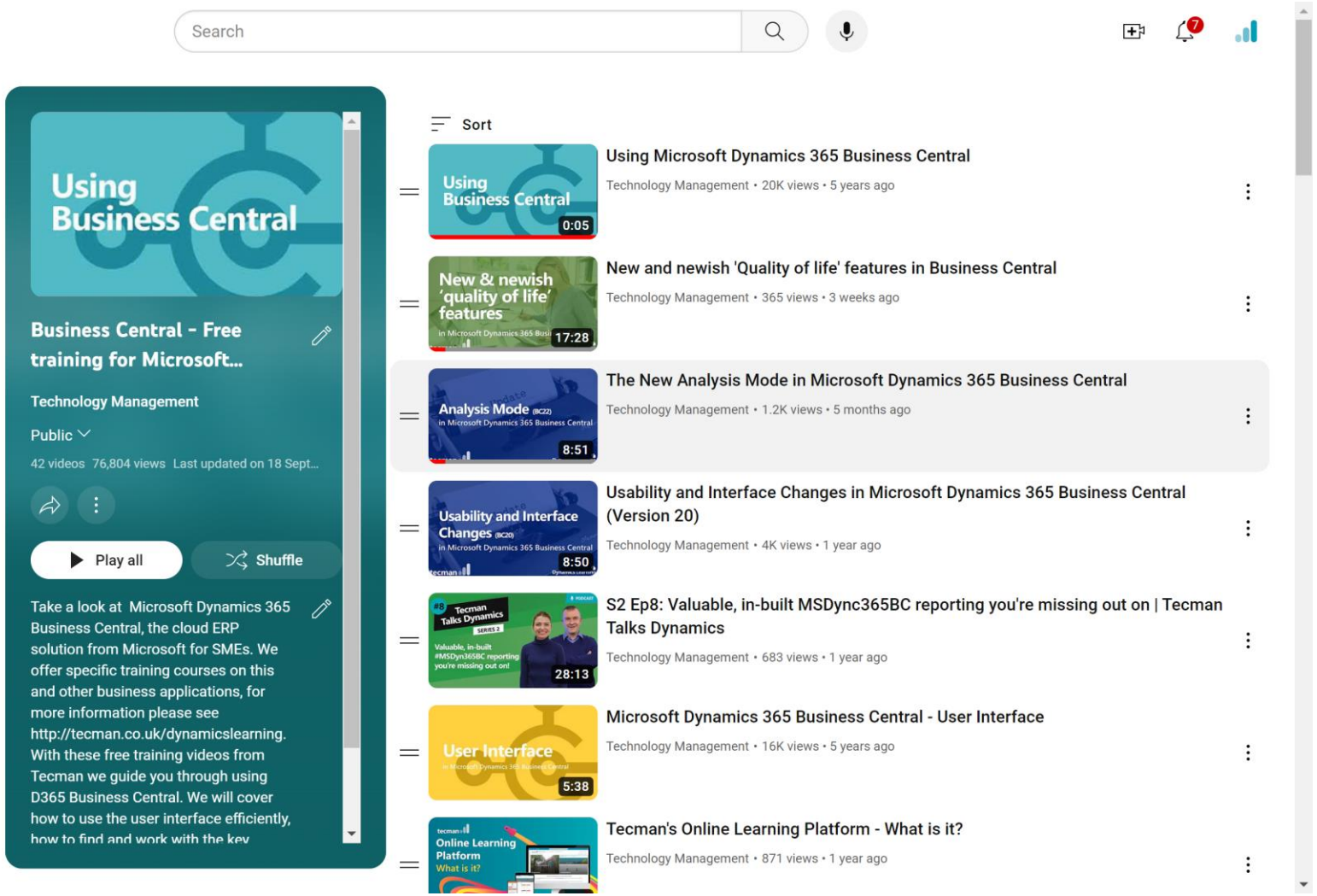
S3 Ep13: Not just a name change for Microsoft Dynamics 365...

94 views • 3 weeks ago

Wrap Up August 2023

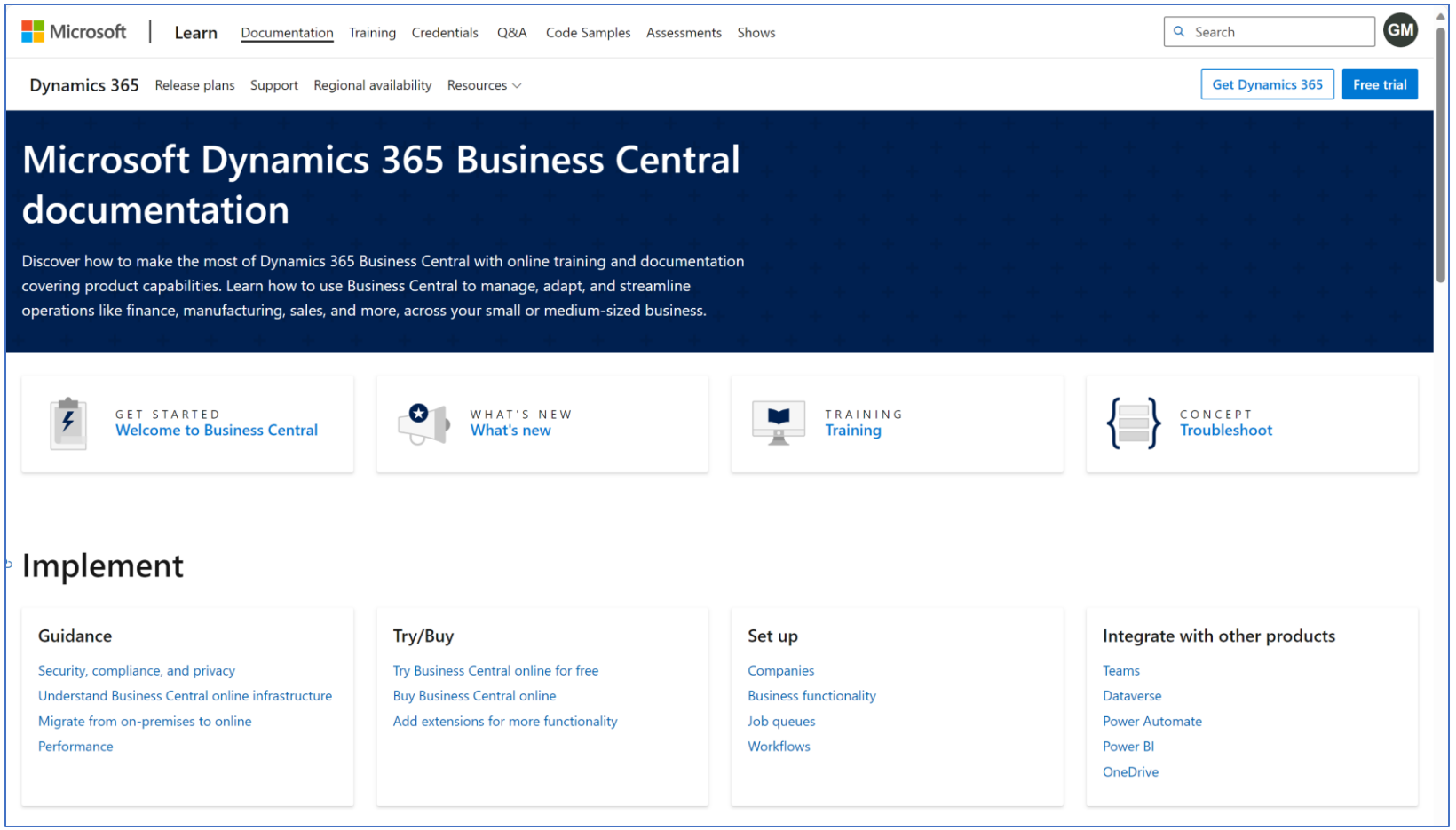
49 views • 1 month ago

Our YouTube channel playlists



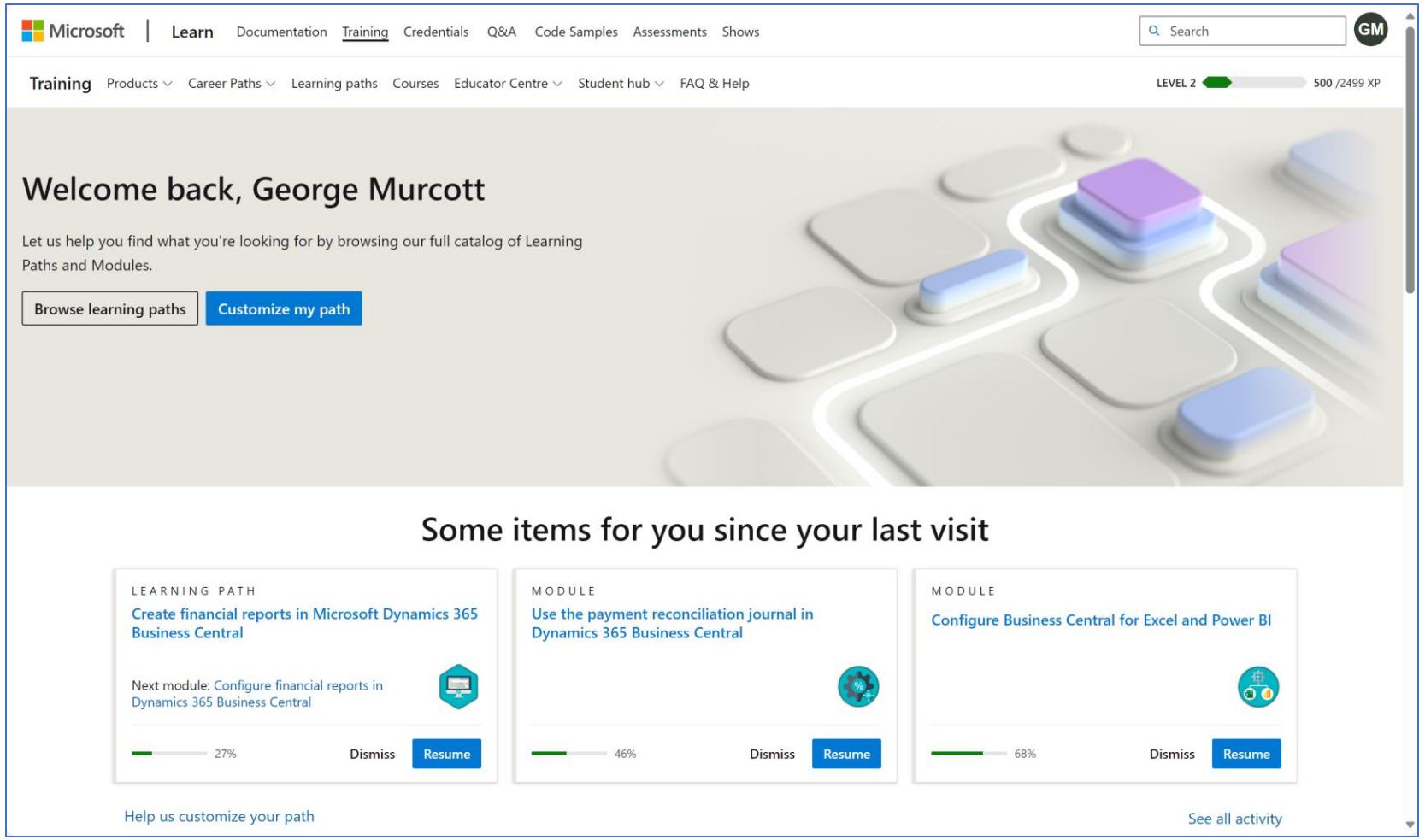
https://youtube.com/playlist?list=PLoS7gV-LINmnnfcyMVmaQk5i6fBhskry4

Online help for D365BC



https://learn.microsoft.com/en-GB/dynamics365/business-central

Online training for D365BC



https://learn.microsoft.com/en-gb/training/

QUESTIONS ?

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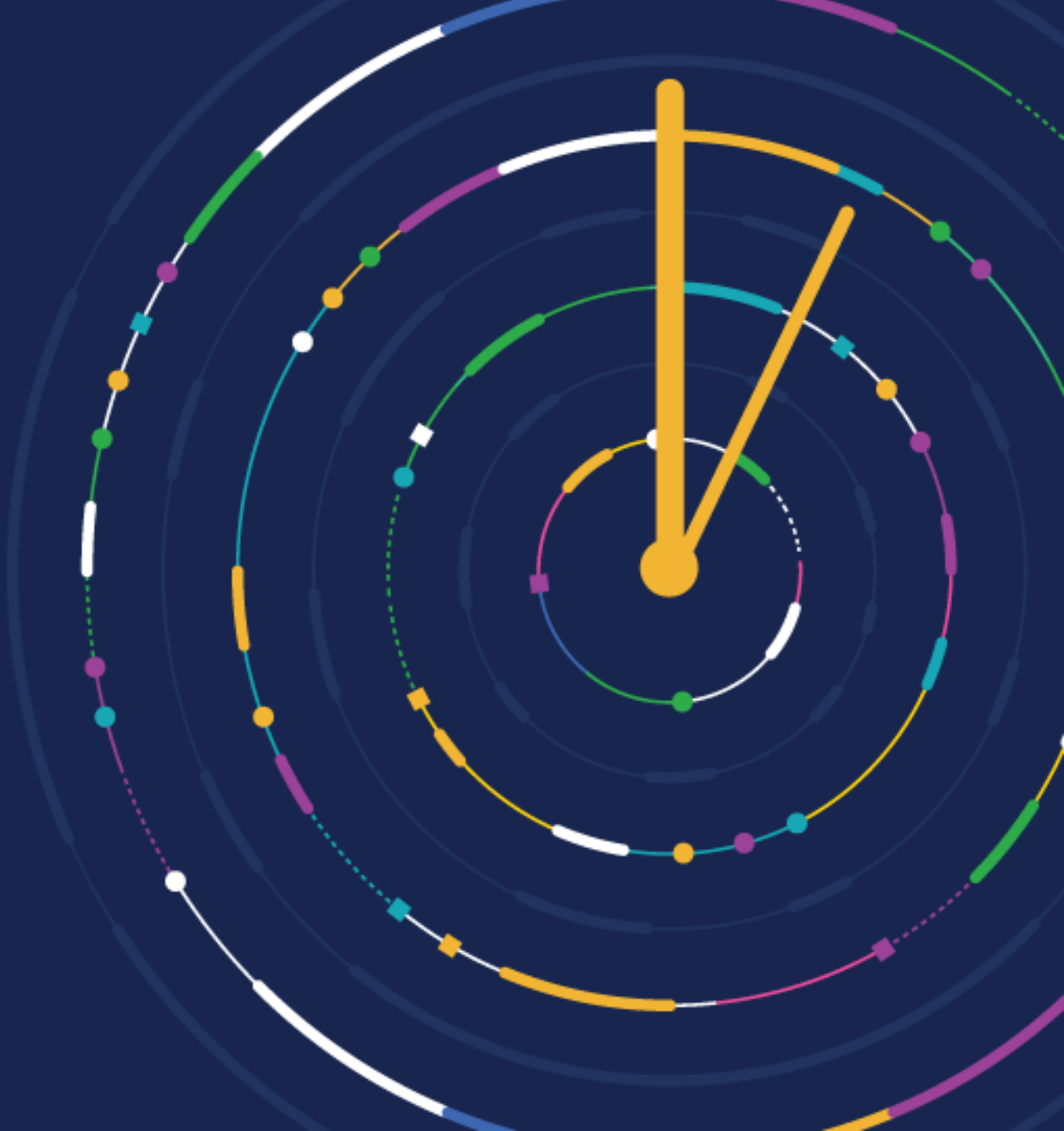
THANK YOU



CUSTOMER DAY 2023