

Reporting and daily work in Microsoft Dynamics 365 Business Central

A field guide for teams coming from Microsoft Dynamics Great Plains

01 / INTRODUCTION

From static reporting to ad-hoc analysis

In Dynamics GP, financial reporting is static, and teams lean on manual workarounds to get anything useful. Reporting logic is locked into rigid account segments, so every meaningful analysis ends up in Excel. One report answers one question. Ask a follow-up question, and you rebuild or re-run the whole thing.

Business Central solves this by replacing those rigid segments with flexible dimensions. You tag each record with a dimension such as customer, vendor, item, or department, and skip the long account numbers that used to bloat the chart of accounts for every department or region. As transactions post, the system tracks and totals those tags automatically, so you can analyze performance by any attribute without the clutter.

What's inside

- Pre-built reports by industry
- Six everyday tasks, with short videos
- Proof from the field
- Where to start

Reporting you have on day one

Day to day, reporting changes in a few concrete ways:

BEFORE GREAT PLAINS	AFTER BUSINESS CENTRAL
Export, manipulate, present Every answer takes a trip through Excel.	Reports live in the system Structured financials, ready to run.
Rebuild for every variation A new angle means a new report.	Ad-hoc analysis answers questions Re-slice by any dimension on the spot.
Proof lives outside the system Numbers get re-checked in spreadsheets.	Drill-down validates instantly Every number traces to the transaction.

The payoff: fewer steps between the question and the answer.

Business Central ships Power BI report apps by functional area: finance, sales, purchasing, inventory, projects, and more. The monthly reports finance teams once rebuilt by hand now arrive prebuilt. Open one, pin what matters to a dashboard, and click any figure to see the transaction. We've grouped the key reports by industry.

The core financials

Whatever the industry, these five arrive first and answer the questions leadership asks most:

- **Financial Overview:** your revenue and profit position the moment you log in.
- **Income Statement:** income accounts compared month over month.
- **Balance Sheet:** balances at a date, and how they move over time.
- **Budget Comparison:** variances between budget and actuals by month.
- **Aged Receivables:** customer balances aged by document, due, or posting date.

Distribution

Outcome: protect margin and avoid stocking out of the wrong thing.

- **Item Availability:** on-hand quantity plus requirements and planned production, so buyers plan against the real position.
- **Inventory by Location:** where stock sits across warehouses and sites.
- **Sales by Item:** what sells, with gross profit and margin, so slow or low-margin lines surface fast.
- **Purchases by Vendor:** which vendors drive spend, and where terms are worth renegotiating.
- **Inventory forecasting:** AI projects demand so you plan replenishment ahead of stockouts, delivered as a Power BI report.

Manufacturing

Outcome: find the bottleneck before it finds you, and hold cost to plan.

- **Production Order Overview:** completion rates and planned versus finished output at a glance.
- **Work Center Load and Current Utilization:** how loaded each center is, and where the line is choking right now.
- **Consumption Variance:** material variance per item and production order.
- **Capacity Variance:** capacity variance per work center, so labor and machine time stay accountable.

Professional services

Outcome: know which projects make money, while there is still time to act.

- **Project Profitability:** profit per job measured against target.
- **Performance to Budget:** how each project tracks to its budget as work proceeds.
- **Project Realization:** completion and realization statistics per engagement.
- **Project Tasks:** tasks with their costs and prices, for margin at the task level.

Billing on retainer or subscription? Subscription Billing apps track recurring revenue, churn, revenue by customer, and total contract value.

Nonprofit

Outcome: budget accountability and board-ready answers, without the month-end scramble.

- **Budget Comparison:** variance between budget and actuals by month, the working view for program and grant managers.
- **Financial Overview and Income Statement:** position and activity leadership and the board can read without a rebuild.
- **Aged Receivables:** pledges and grants receivable, aged by date.

Dimensions let you report by program, grant, fund, or restriction without a sprawling chart of accounts.

The apps install and connect to your data. You choose which reports to surface and track their KPIs against your business objectives. To go deeper, see [track your business KPIs with Power BI metrics](#).

What Copilot adds

The newer capabilities add a forward view. Copilot and machine learning read the reports and project what is coming, so you can act before the month closes.

- **Analysis assist:** describe in plain words what you want to see, and Copilot arranges a list into an analysis view with grouping, pivots, filters, and totals, without leaving BC. [\(preview\)](#)
- **Summarize:** Copilot condenses a record into a few points for your role, right beside the data, with links to the detail. [\(preview\)](#)
- **Semantic search (Tell Me):** type what you need in your own words, and search matches on meaning, so a near-miss still finds the record.
- **Late payment prediction:** scores open invoices by how likely they are to pay late, so collections can prioritize and terms can change early.
- **Cash flow analysis:** projects inflows and outflows from history and open documents, for a forward view of liquidity.

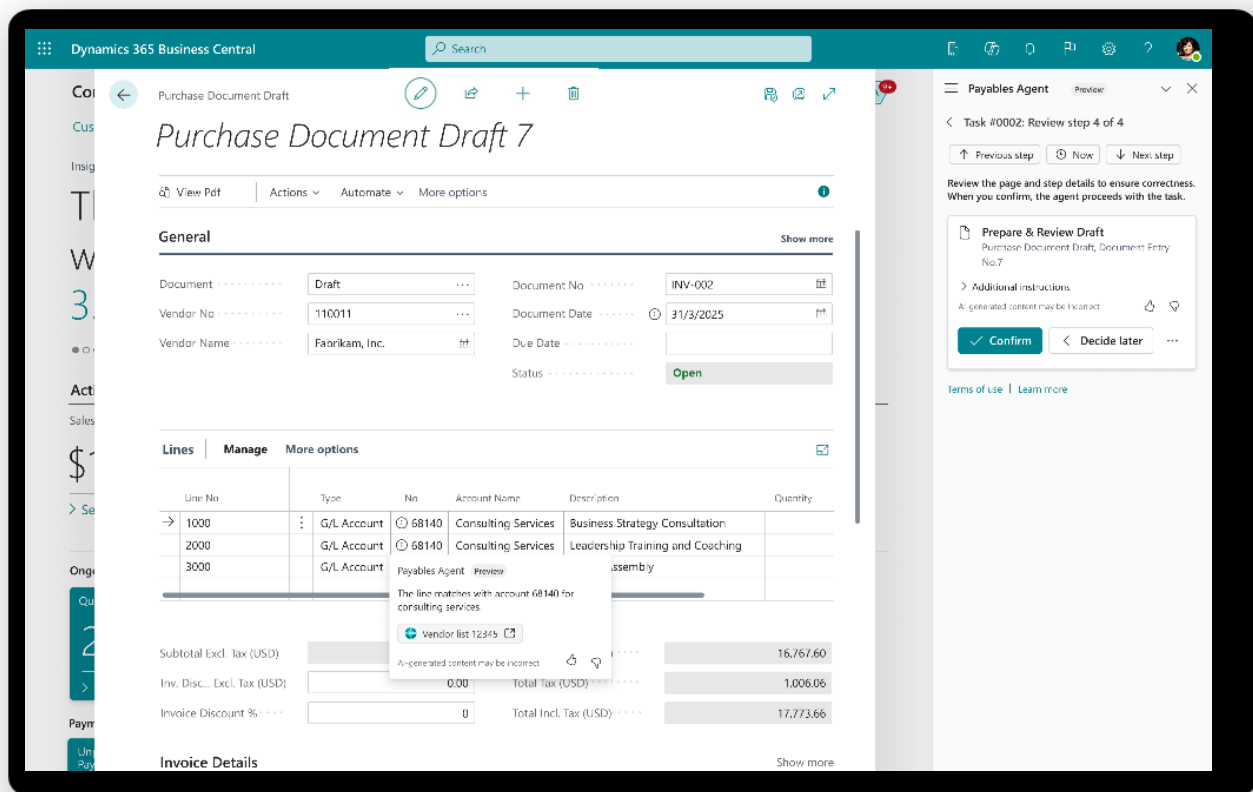
The screenshot displays the Dynamics 365 Business Central interface for the 'Customer Ledger Entries' report. The report is in 'Analysis 1' view. The table shows customer numbers and their corresponding amounts. A filter dropdown menu is open, showing options like 'Greater than', 'Less than', 'Between', 'Equal to', and 'Not equal to'. The right-hand pane shows 'Analysis Filters' and 'Row Groups'. The 'Row Groups' section shows 'Customer No.' as a group. The 'Values' section shows 'Sum(Amount)' as a value. The bottom status bar indicates 'Rows: 214 of 415', 'Total Rows: 415', and 'Filtered: 214'.

Customer No.	Sum(Amount)
> 30000 (59)	238,948.93
> 10000 (33)	237,014.28
> 50000 (43)	88,993.80
> 40000 (28)	76,454.72
> 20000 (51)	76,339.92
	717,751.65

How the daily work compares

Most GP habits carry straight over. Journals and posting previews work the way you expect; only the screens look different. Below are six everyday tasks side by side, each with a short Microsoft video.

TASK	IN DYNAMICS GP	IN BUSINESS CENTRAL	VIDEO
Entering receivables	Enter in the Receivables Transaction Entry window, post, and apply credit memos through Apply Sales Document.	The same flow runs through Sales Journals or Sales Invoices, with a posting preview so you see the ledger result before you commit. GL accounts and inventory items can sit on one invoice.	Watch ›
Entering payables	Log AP invoices with vendor, invoice number, and cost.	Use Purchase Journals for admin expenses or Purchase Invoices for inventory and assets. Run a posting preview first, and mix classifications on a single voucher.	Watch ›
General journal entries	Build batches for recurring entries like insurance or interest.	Organize General Journal batches by operation or user. Type an account name and the list filters itself. Edit in Excel pushes mass changes straight back to BC.	Watch ›
Trial balance & aging	Print detail trial balances and historical aged trial balances.	Search for summary or detailed trial balances, layer actuals against prior year or budget for variance percentages, and age AR and AP by selectable dates. Export to PDF, Word, or live Excel.	Watch ›
Segments & dimensions	Combine segmented strings like division, account, and department to break down activity.	Pair a natural account with dimensions. Set default dimensions on customers and vendors, and mark them Code Mandatory to enforce clean entry. Report by dimension without decoding strings.	Watch ›
Financial reporting	Management Reporter and Advanced Financial Analysis for statements.	Financial Reports built on account schedules. Format rows, add formulas, switch column layouts, and filter by dimension or department. The migration keeps your GP account categories mapped.	Watch ›



Agents that handle the routine

AI agents in Business Central are goal-driven, autonomous assistants that handle multi-step business processes. Each one completes its work, then hands it back for you to approve.

- **Payables Agent:** watches the company mailbox for vendor invoices, extracts the details, matches them to purchase orders and receipts, and proposes posting for the exceptions, around the clock.
- **Bank reconciliation assist:** proposes matches between statement lines and ledger entries, and suggests posting accounts for the lines left over.
- **Expense Agent:** photograph a receipt and AI reads the merchant, amount, date, and category, then checks it against policy before submission. Works by web, email, or chat, no BC license needed.
- **Sales Order Agent:** turns an emailed quote request into a drafted quote, then into an order once the customer confirms.
- **Autofill and e-document matching:** Copilot suggests field values as you create records, and maps vendor e-invoices to the right purchase order lines.

Built-in Governance & Compliance

These features are built directly into Business Central to read your data securely within Microsoft's cloud boundary, without using your data to train public AI models. They strictly follow Microsoft's Responsible AI principles and enterprise privacy and compliance standards.

Andretti Indoor Karting & Games

Andretti Indoor Karting & Games, a US family-entertainment operator, moved from QuickBooks to Dynamics GP and then to Business Central as it scaled past seven locations, with more opening each year.

Key outcomes

- **Faster month-end close:** financial statement turnaround dropped from 10 days to 3–5.
- **Less manual work:** daily cash receipts and bank transactions now post automatically, cutting processing time and errors.
- **Higher compliance:** tighter controls increased purchase-request compliance from ~40% to 98%.
- **Strategic shift:** the finance team spends more time on analysis and forecasting.

“We don't anticipate that we'll need to add any further accounting or IT personnel because of the efficiencies we've gained with Business Central. I'd say cost savings are in at least the \$300,000 to \$500,000 a year range.”

Tammy Koehler, Chief Financial Officer, Andretti Indoor Karting & Games

Source: [Microsoft customer story](#). Results are specific to this organization.

05 / ECONOMIC RESEARCH

The three-year financial impact

Microsoft commissioned Forrester Consulting to measure [the financial impact of Business Central](#). Forrester interviewed four organizations and built a composite: a US company with \$50 million in revenue and 300 employees, doing project-based work in manufacturing and construction. Over three years, that composite showed:



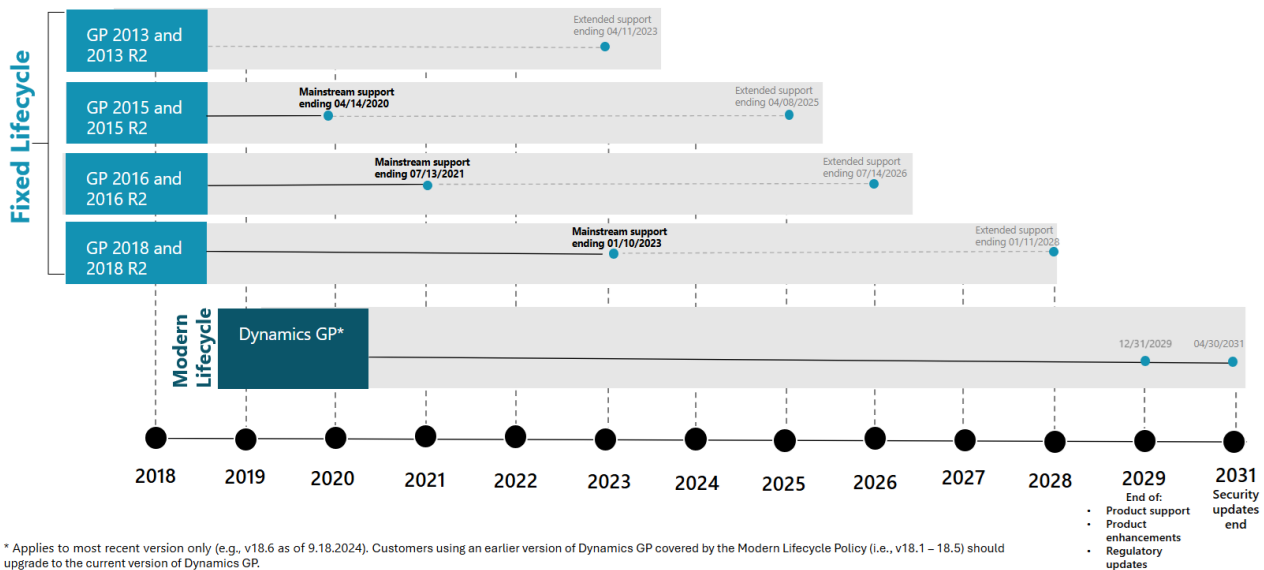
The gains that matter most for reporting and the daily close:

- **Up to 30% faster monthly close:** by Year 3, worth roughly \$216K in present value across finance-team productivity.
- **Up to 50% less time on AP, AR, and billing:** the routine entry work, automated away.
- **Up to 30% less audit-prep time:** a consolidated data model valued near \$49K.
- **Around 14% lower total cost of ownership:** from retiring legacy systems and point solutions, worth about \$175K.

GP's end-of-support dates, and what they mean

Microsoft has set the dates. New Dynamics GP sales ended on April 1, 2026. Mainstream support (product enhancements, regulatory and tax updates, service packs, and technical support) ends December 31, 2029, with security updates continuing only through April 30, 2031.

After 2029, the tax and regulatory updates finance teams rely on stop, and staying on GP becomes a compliance risk. Plan the move while support is intact and your team has time to learn the reports first.



The questions GP teams ask most

Do we still need Excel?

Yes, for ad hoc analysis. What changes is that Excel stops being the system of record. The numbers live in Business Central, and you export only when you want to slice something on your own.

Can we trace a number back to its transaction?

Yes. Drill-down is native. From a KPI or a report figure you click through to the entry, with no special setup.

Do the Power BI apps need a specialist?

No. They install as apps and connect to your data. You choose which reports to show and tune them to your KPIs, and you start from a working set rather than a blank canvas.

What happens to our custom financial statements?

You rebuild the layouts in Financial Reports using account schedules. Account categories keep their mapping so the statements stay accurate, and the layout design is yours to redo once.

How steep is the learning curve?

Daily entry feels familiar fast. The real shift is thinking in dimensions instead of segmented account strings, and that pays off the first time you report by department without decoding an account number.

Is the AI safe to turn on?

It stays inside Business Central and follows Microsoft's Responsible AI principles. Several features are opt-in and marked preview, so you can adopt them as they fit your team.

08 / YOUR NEXT STEPS

Start with the reports you rebuild

For most GP teams, the next questions are:

- How does this map to your current reports?
- Which of your recurring reports could move into the system?
- Where are you still relying on Excel?

Kevin Alexander, our Dynamics solutions architect, puts it plainly: define your reporting needs first, and the rest of the evaluation gets easy.

1. Identify your top five recurring reports.
2. Note where Excel is required today.
3. List two or three common follow-up questions those reports trigger.
4. Use those as your demo scenarios.

[Book a Reporting Readiness Review ›](#)

