

CONVERGENCE

AI+
ERP

MIAMI | 2025

Analytics and insights in Business Central

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USER GROUP

Agenda

- 01 Introduction to analytics and reporting
- 02 KPI reporting
- 03 Dashboards with Power BI
- 04 Built-in reports
- 05 Ad-hoc analysis
- 06 Financial analytics

Navigating the rapid changes with data analytics



Demand for real-time analytics



New technologies and AI



Need for cross-functional and strategic data integration



Data quality and compliance

Microsoft Dynamics 365 Business Central

Connect finance, sales, service, and operations teams with a comprehensive business management solution and harness the power of AI with Microsoft Copilot



Trusted by **over 45,000** small and medium-sized businesses
Named **"the Best ERP System"** in 2024 by Forbes Advisor

Unlock business growth with powerful **analytics and reporting** tools in Business Central



Decision-making

Enhanced decision-making with real-time data insights and less risk



Financial visibility

Gain clear insights into cash flow, profitability and budgeting



Operational efficiency

Identify bottlenecks, inefficiencies, and underperforming areas of your business



Customer insights

Tailor sales strategies to improve customer retention with segmentation and personalization



Scalability

Seamlessly adapt to new markets and data sources with flexible analytics and AI-infused reporting tools

Business Central analytics and reporting capabilities



Financial reporting

No-code solution for the finance team to produce financial reports and statements



Power BI

Interactive dashboards with KPIs and data insights



Data analysis

Group, sort, filter, and pivot your data without leaving the Business Central app



Built-in reports

Pick between 300+ pre-built reports



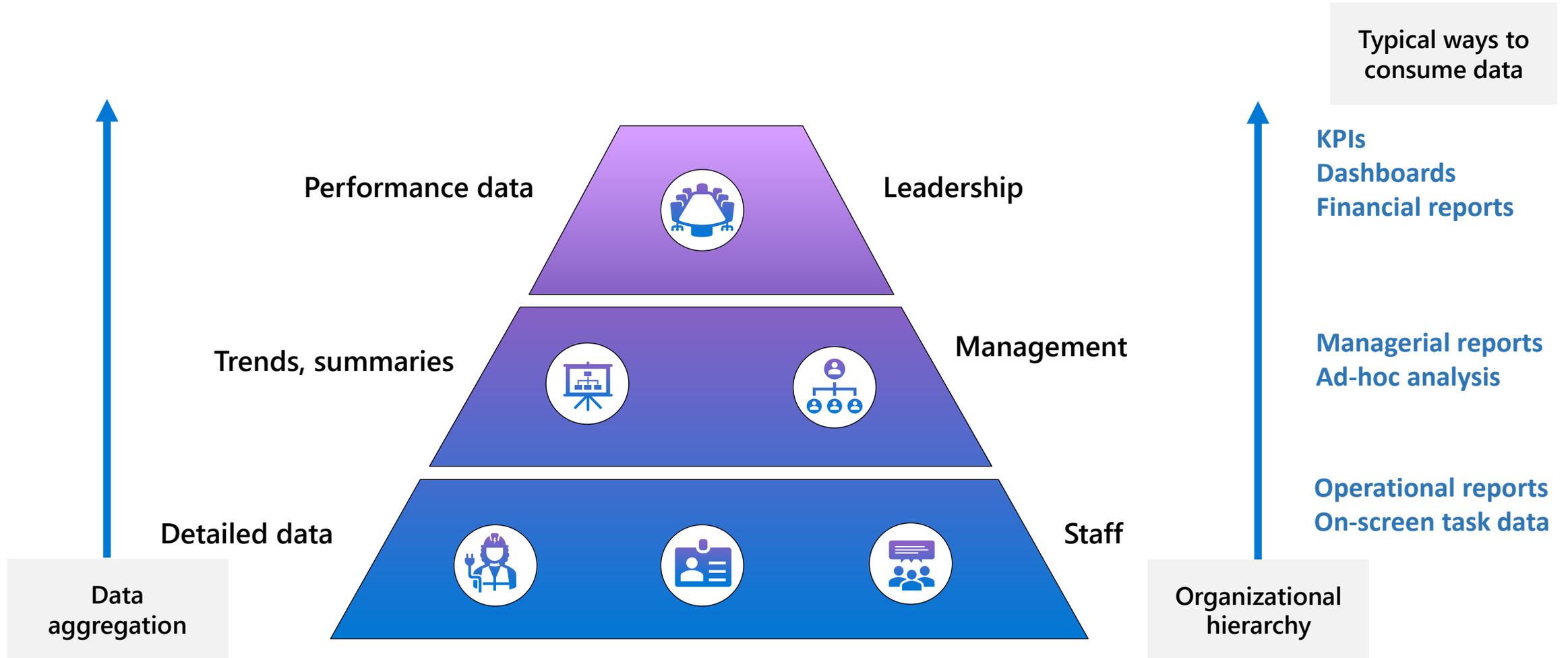
Excel

Analyze your data further with the rich Excel integration



Outputs

Typical analytics needs in organizations



Use **key performance indicators (KPIs)** to meet your business goals

Identifying and tracking KPIs lets you know if your business is on the right path—or if you should change course to avoid losing valuable time and money. When used properly, **KPIs are powerful tools that help you:**

- Monitor company financial health
- Measure progress against strategic goals
- Spot problems early on
- Make timely adjustments to tactics
- Motivate team members
- Make better decisions, faster



Drive organizational change with data

A **KPI report** helps stakeholders and team members identify trends or bottlenecks over a specific time period, so that they're able to make better decisions

Reporting subjects could include:

- Insights into the company's day-to-day operations
- Financial health of the company against targeted KPIs
- Notable trends or patterns presented by the data
- Deeper analysis of the data to assist with strategic decision-making



Identify key KPIs: only pick KPIs that align to your specific goals. It's difficult to match KPIs to unclear objectives



Set realistic targets: set realistic targets based on historical data, resources, and current tactics



Assign teams to targets: make sure that for whatever KPIs you pick, there's a core team responsible for defining them



Determine the timeframe: consider focusing on a specific timeframe or set short- and long-term targets



Take action: whether you're meeting your goals or falling behind, KPIs are tools to help you make better decisions

Dashboards with Power BI

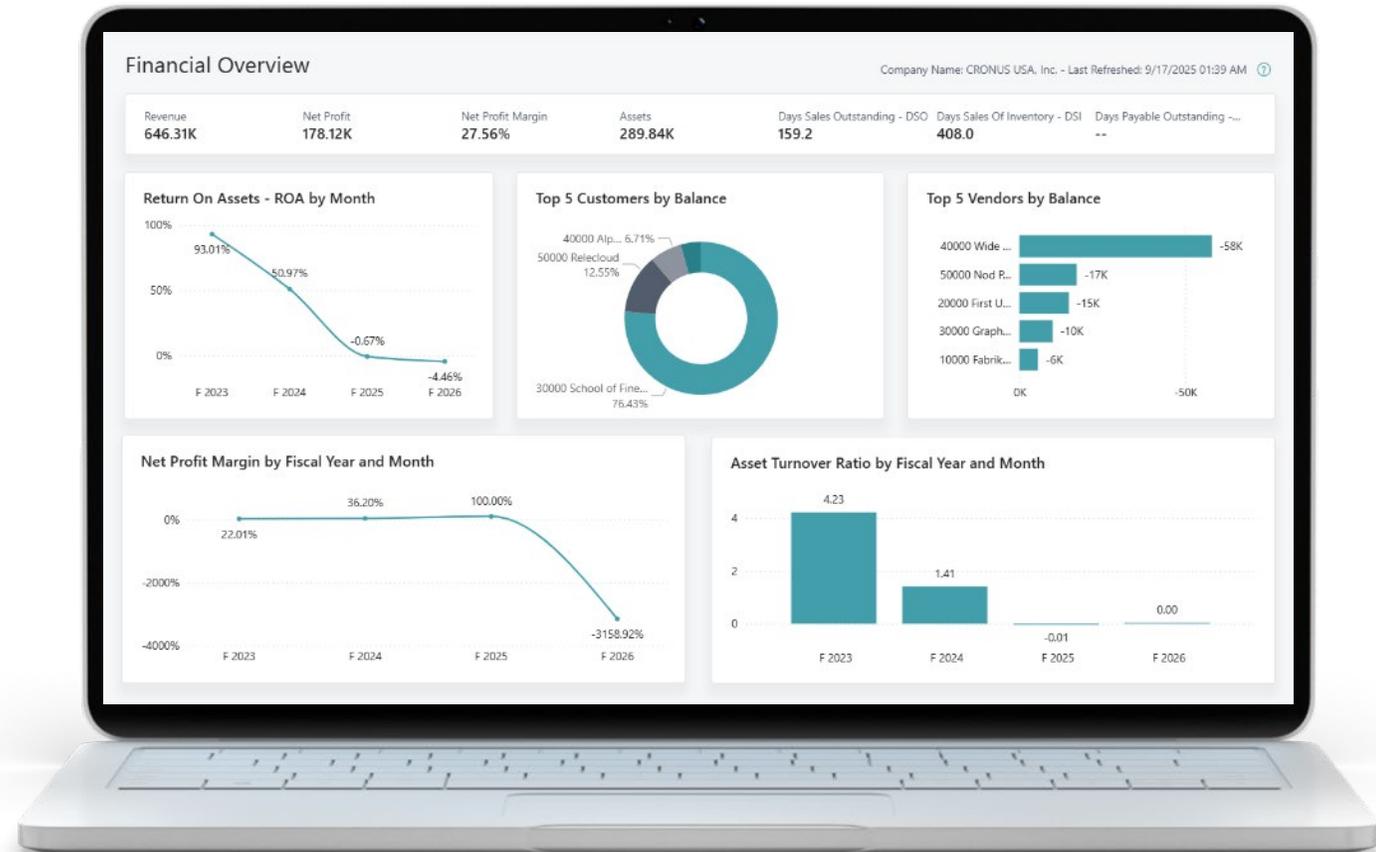
View dashboards directly inside Business Central

Create your own reports using the Business Central connector

With metrics in Power BI, you can curate your own metrics and track them against key business objectives, in a single pane.

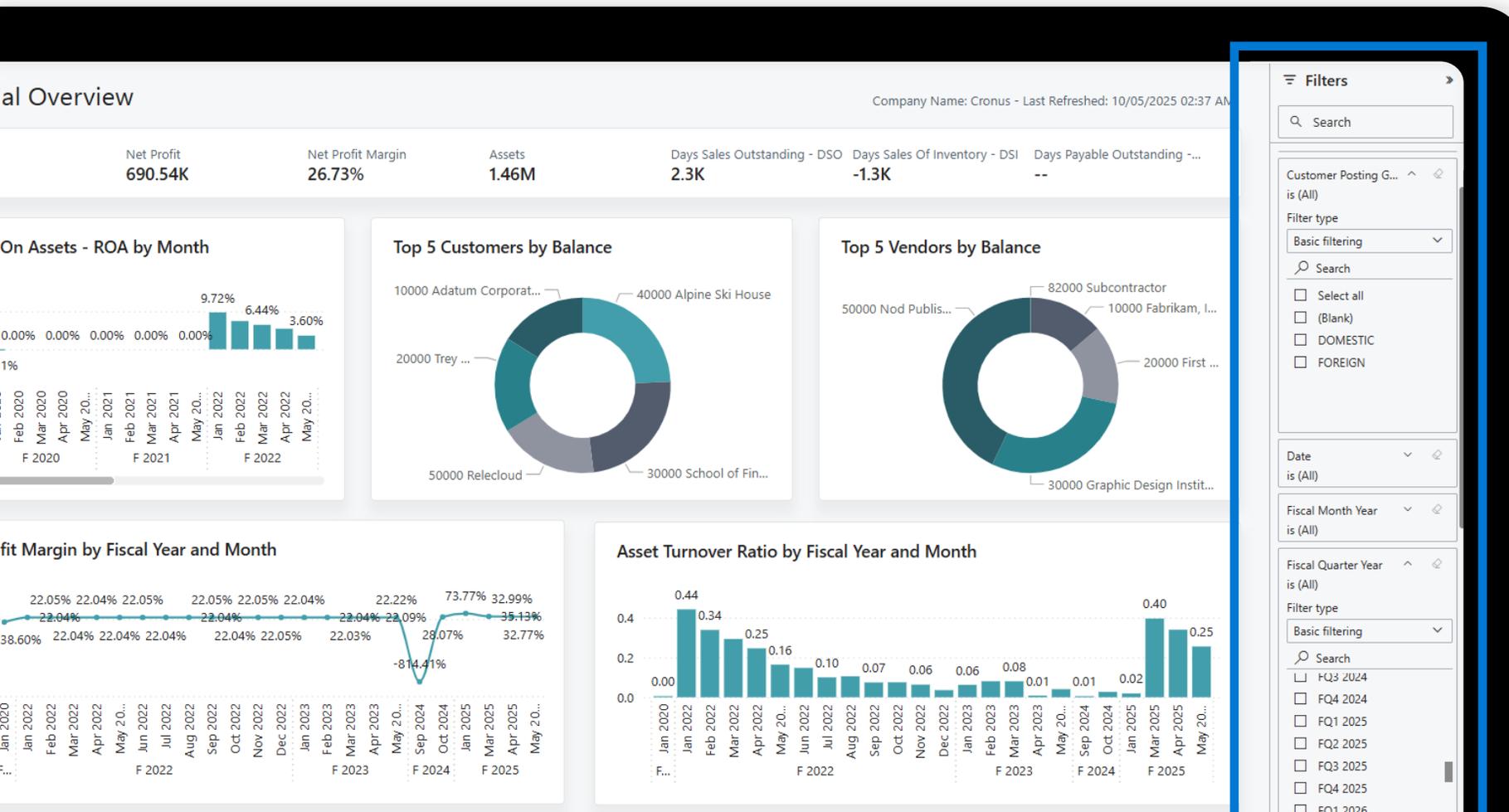
Power BI apps are available for the following functional areas in Business Central:

- Finance (16 reports)
- Sales (19 reports)
- Purchasing (17 reports)
- Inventory + Valuation (15 reports)
- Projects (8 reports)
- Manufacturing (18 reports)
- Sustainability (10 reports)
- Subscription billing (14 reports)



Built-in data filtering with Power BI

Filter dashboards to any entity shown on the page.



Distribute reports to your teams

Subscribe to your reports and distribute to your team over email, SharePoint, or OneDrive. Get reports as PDF or PowerPoint.

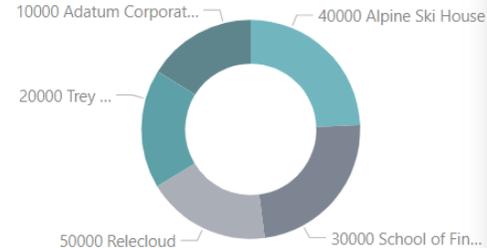
Financial Overview

Revenue	Net Profit	Net Profit Margin	Assets	Days Sales Outstar
2.58M	690.54K	26.73%	1.46M	2.3K

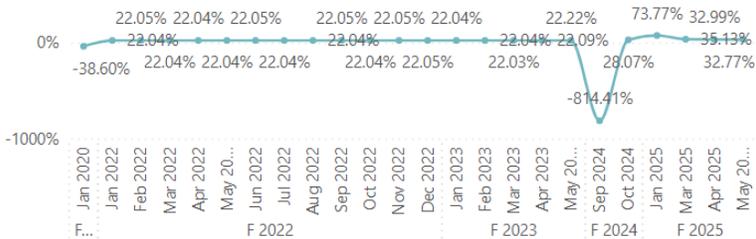
Return On Assets - ROA by Month



Top 5 Customers by Balance



Net Profit Margin by Fiscal Year and Month



Asset Turnover Ratio



Subscriptions

Keep track of your data by subscribing to this report.

The sensitivity label on this report does not appear in emails.

Manage all

▼ Daily Financial Overview

Subscription name *

Recipients *

Attach full report

Send to *

Repeat *

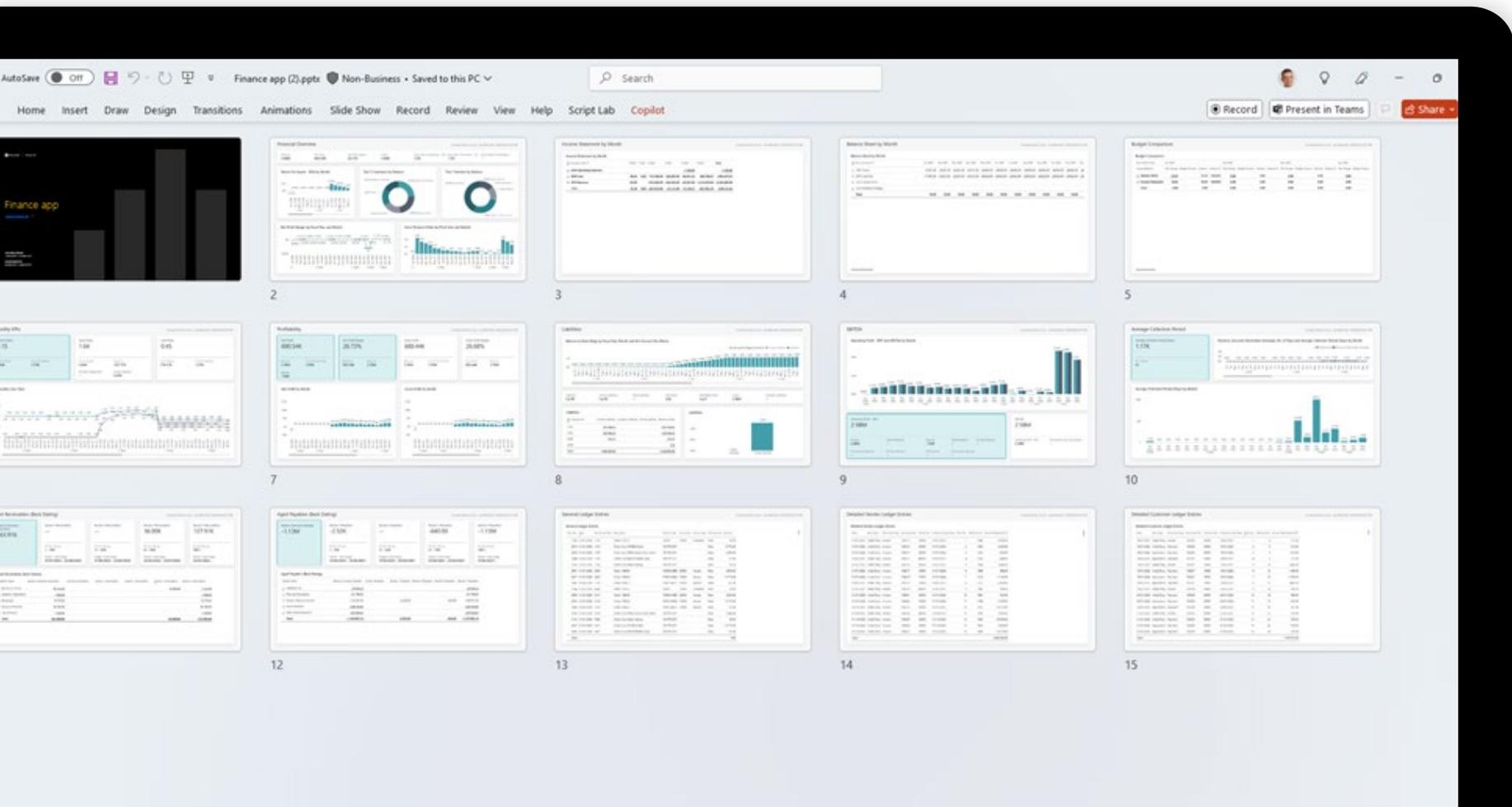
Scheduled time *

Time zone *

Emails will be sent daily at 01:45 PM (UTC-06:00) Central Time (US and Canada) starting Wednesday, 3 April 2025.

Present your reports in PowerPoint

Use live data from Power BI for powerful storytelling in your PowerPoint presentations



Demo: drill-back to Business Central

- Table and matrix reports include links on numbers.
- When clicked, Business Central opens in a new browser window and shows the transactions behind the number.

Note! available from version 26.2 and later.



Power BI



Income Statement by Month

Income Statement by Month

Company Name: CRONUS USA, Inc. - Last Refreshed: 04/03/2025 02:47 AM

Drill on Rows 

Filters

Income Statement by Month

G/L Account (Level 1)	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec
50001 TOTAL COST OF GOODS SOLD	<u>27,707.60</u>	<u>32,186.80</u>	<u>40,054.40</u>	<u>44,561.30</u>	<u>36,035.90</u>	<u>48,870.80</u>	<u>28,570.90</u>	<u>33,629.70</u>	<u>25,979.10</u>	<u>28,402.50</u>	<u>25,874.60</u>	<u>15</u>
40001 TOTAL INCOME	<u>-35,529.70</u>	<u>-41,274.90</u>	<u>-51,360.60</u>	<u>-57,142.40</u>	<u>-46,207.70</u>	<u>-62,665.00</u>	<u>-36,636.10</u>	<u>-43,123.60</u>	<u>-33,314.50</u>	<u>-36,420.80</u>	<u>-33,181.20</u>	<u>-20</u>
40100 Sales of Goods	<u>-35,529.70</u>	<u>-41,274.90</u>	<u>-51,360.60</u>	<u>-57,142.40</u>	<u>-46,207.70</u>	<u>-62,665.00</u>	<u>-36,636.10</u>	<u>-43,123.60</u>	<u>-33,314.50</u>	<u>-36,420.80</u>	<u>-33,181.20</u>	<u>-20</u>
40110 Sale of Raw Materials												
40140 Resale of Goods	<u>-35,529.70</u>	<u>-41,274.90</u>	<u>-51,360.60</u>	<u>-57,142.40</u>	<u>-46,207.70</u>	<u>-62,665.00</u>	<u>-36,636.10</u>	<u>-43,123.60</u>	<u>-33,314.50</u>	<u>-36,420.80</u>	<u>-33,181.20</u>	<u>-2</u>
Total	<u>-7,822.10</u>	<u>-9,088.10</u>	<u>-11,306.20</u>	<u>-12,581.10</u>	<u>-10,171.80</u>	<u>-13,794.20</u>	<u>-8,065.20</u>	<u>-9,493.90</u>	<u>-7,335.40</u>	<u>-8,018.30</u>	<u>-7,306.60</u>	<u>-4</u>

Notice all the underlines?



Power BI



Income Statement by Month

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Click here to get to the underlying numbers.

Remember the number 35529.70

Filters

Posting Date ↓ ▾	Document Type	Document No.	G/L Account No. ↓ ▾	Description	Department Code	Customergro... Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount (\$)	al. Account type	Bal. Ac No.
31/01/2023	Invoice	PS-INV103013	40140	Invoice S-INV102013	SALES	MEDIUM	Sale	DOMESTIC	RETAIL	-2,066.80	/L Account	
28/01/2023	Invoice	PS-INV103012	40140	Invoice S-INV102012	SALES	LARGE	Sale	DOMESTIC	RETAIL	-10,688.00	/L Account	
27/01/2023	Invoice	PS-INV103011	40140	Invoice S-INV102011	SALES	MEDIUM	Sale	DOMESTIC	RETAIL	-771.20	/L Account	
25/01/2023	Invoice	PS-INV103010	40140	Invoice S-INV102010	SALES	SMALL	Sale	DOMESTIC	RETAIL	-3,844.40	/L Account	
25/01/2023	Invoice	PS-INV103009	40140	Invoice S-INV102009	SALES	LARGE	Sale	DOMESTIC	RETAIL	-384.30	/L Account	
24/01/2023	Invoice	PS-INV103008	40140	Invoice S-INV102008	SALES	MEDIUM	Sale	DOMESTIC	RETAIL	-2,601.60	/L Account	
22/01/2023	Invoice	PS-INV103007	40140	Invoice S-INV102007	SALES	SMALL	Sale	DOMESTIC	RETAIL	-10,973.40	/L Account	
22/01/2023	Invoice	PS-INV103006	40140	Invoice S-INV102006	SALES	MEDIUM	Sale	DOMESTIC	RETAIL	-2,305.50	/L Account	
21/01/2023	Invoice	PS-INV103005	40140	Invoice S-INV102005	SALES	SMALL	Sale	DOMESTIC	RETAIL	-385.60	/L Account	
20/01/2023	Invoice	PS-INV103004	40140	Invoice S-INV102004	SALES	MEDIUM	Sale	DOMESTIC	RETAIL	-380.20	/L Account	
19/01/2023	Invoice	PS-INV103003	40140	Invoice S-INV102003	SALES	LARGE	Sale	DOMESTIC	RETAIL	-192.80	/L Account	
18/01/2023	Invoice	PS-INV103002	40140	Invoice S-INV102002	SALES	SMALL	Sale	DOMESTIC	RETAIL	-771.20	/L Account	
17/01/2023	Invoice	PS-INV103001	40140	Invoice S-INV102001	SALES	MEDIUM	Sale	DOMESTIC	RETAIL	-164.70	/L Account	

Opens Business Central in a new browser tab

I wonder how these Amounts relate to 35529.70 ?

Posting Date	Document...	Document No.	G/L Account...	Amount (\$)	Description	Department...	Customergro...
31/01/2023	Invoice	PS-INV103013	40140	-2,066.80	Invoice S-INV102013	SALES	MEDIUM
28/01/2023	Invoice	PS-INV103012	40140	-10,688.00	Invoice S-INV102012	SALES	LARGE
27/01/2023	Invoice	PS-INV103011	40140	-771.20	Invoice S-INV102011	SALES	MEDIUM
25/01/2023	Invoice	PS-INV103010	40140	-3,844.40	Invoice S-INV102010	SALES	SMALL
25/01/2023	Invoice	PS-INV103009	40140	-384.30	Invoice S-INV102009	SALES	LARGE
24/01/2023	Invoice	PS-INV103008	40140	-2,601.60	Invoice S-INV102008	SALES	MEDIUM
22/01/2023	Invoice	PS-INV103007	40140	-10,973.40	Invoice S-INV102007	SALES	SMALL
22/01/2023	Invoice	PS-INV103006	40140	-2,305.50	Invoice S-INV102006	SALES	MEDIUM
21/01/2023	Invoice	PS-INV103005	40140	-385.60	Invoice S-INV102005	SALES	SMALL
20/01/2023	Invoice	PS-INV103004	40140	-380.20	Invoice S-INV102004	SALES	MEDIUM
19/01/2023	Invoice	PS-INV103003	40140	-192.80	Invoice S-INV102003	SALES	LARGE
18/01/2023	Invoice	PS-INV103002	40140	-771.20	Invoice S-INV102002	SALES	SMALL
17/01/2023	Invoice	PS-INV103001	40140	-164.70	Invoice S-INV102001	SALES	MEDIUM
				-35,529.70			

Pivot Mode

Search...

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Document Type
- Document No.
- G/L Account No.
- Amount (\$)
- Description
- Department Code
- Customergroup Code
- Gen. Posting Type
- Gen. Bus. Posting Gro...
- Gen. Prod. Posting Gr...
- Source Currency Code
- Source Currency Amo...
- Debit Amount (LCY)

Row Groups

Drag here to set row groups

Values

- Sum(Amount (\$))
- Sum(Source Curren...)
- Sum(Debit Amount...)
- Sum(Credit Amoun...)

Let's analyze that...

Aaahh.

35529.70

Create new analysis

Built-in reports

Business Central comes with **more than 300 built-in reports** that you can use to support your business processes with data-driven insights

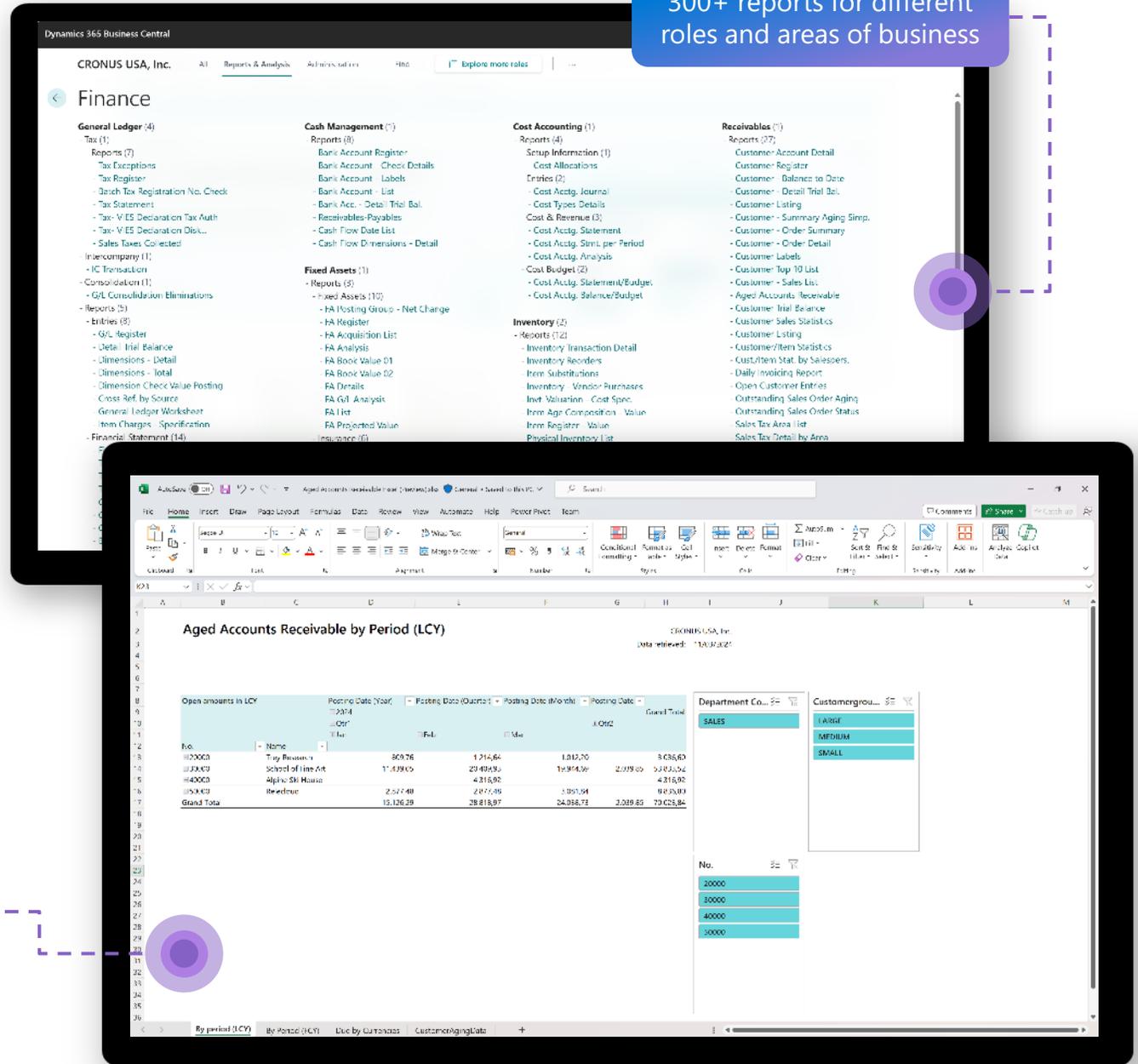
Reports organize and present the information in an easy-to-read format you can use in Excel, print, or save as a file

As an example of an interactive report in Excel, the **aged accounts receivable** report lets you analyze what your customers owe you and when payments are due

Business central includes the ability to preview, print and export reports to .pdf

The aged accounts receivable report in Excel

300+ reports for different roles and areas of business



Ad-hoc data analysis

When you don't have a built-in report that answers your questions

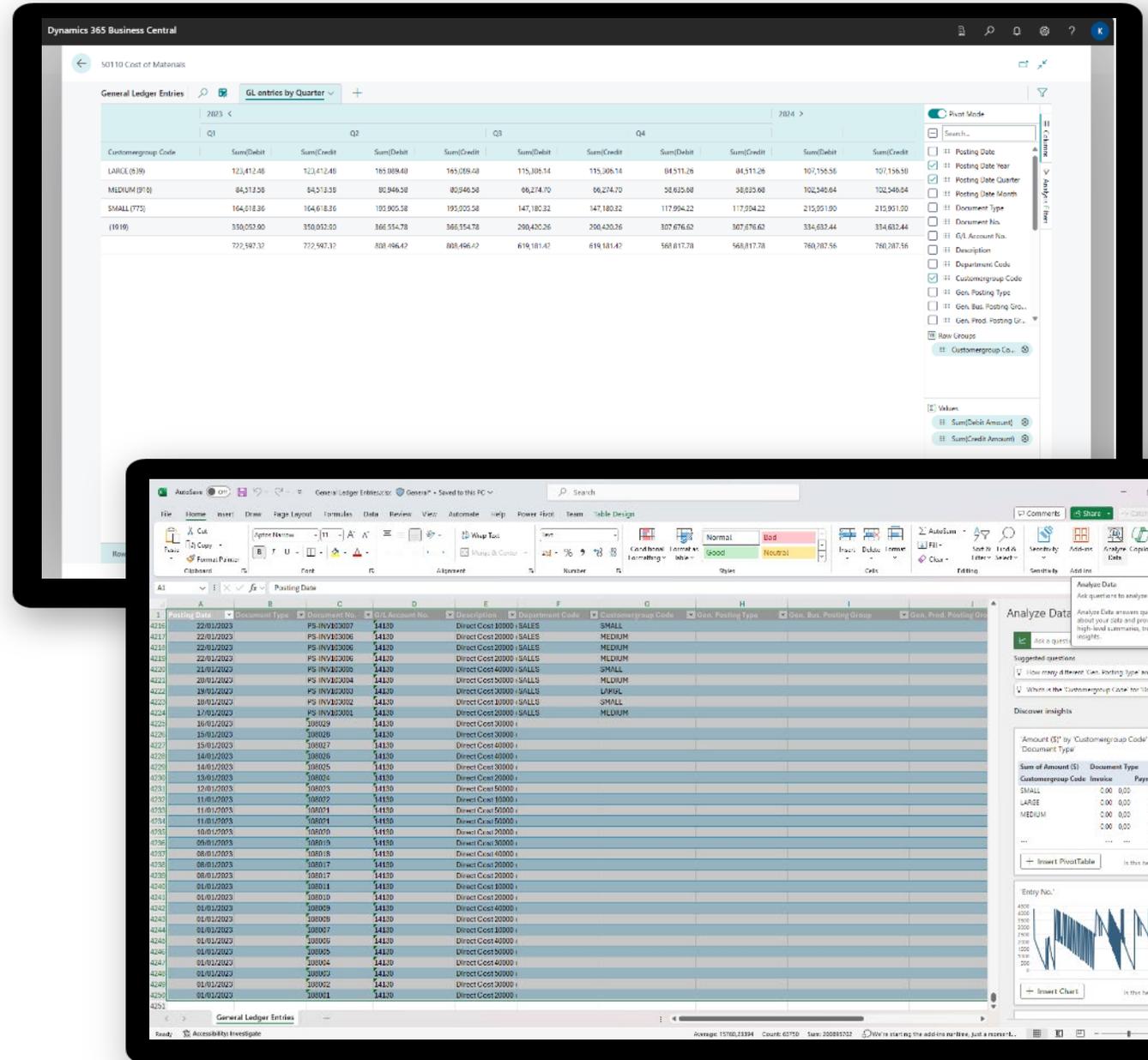
Two features:

- Data analysis on ledger list pages
- Open in Excel

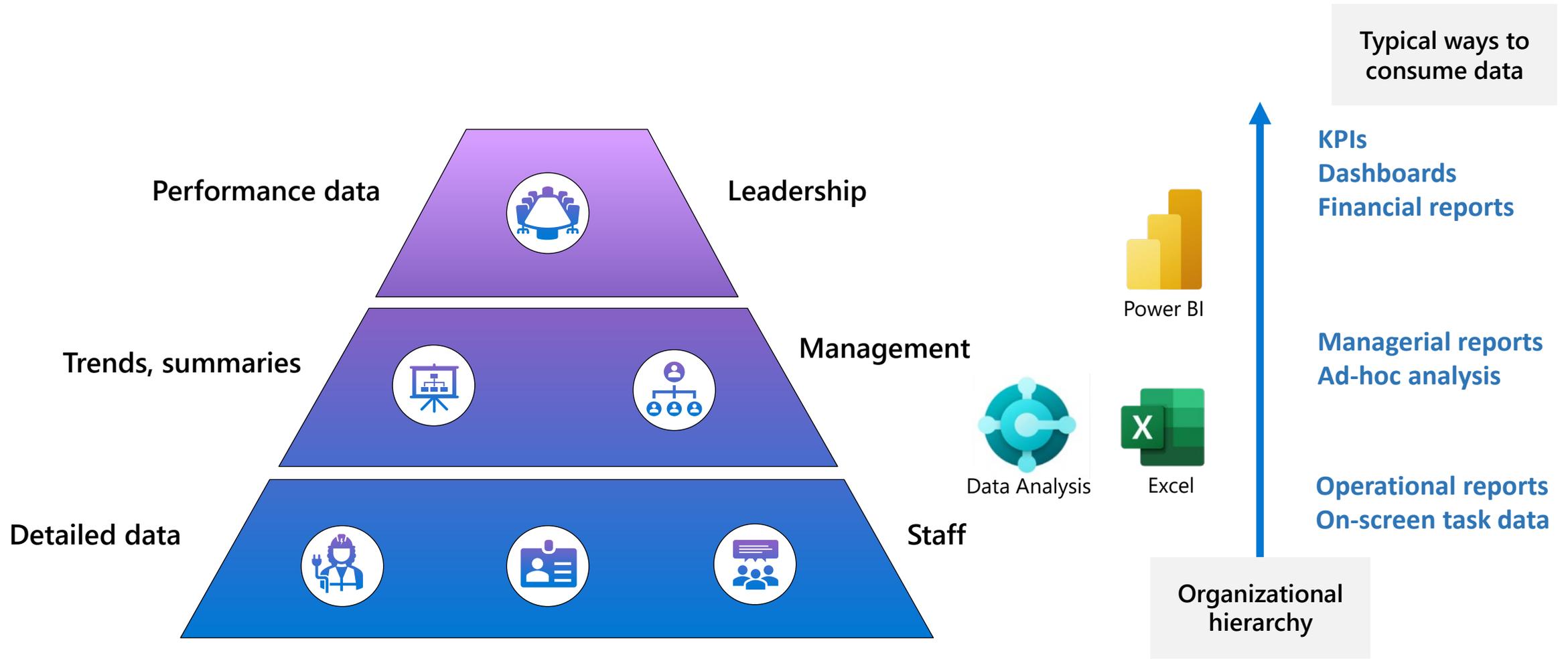
The **Data analysis feature** lets you open almost any list page, such as the *general ledger entries* or *customer ledger entries* pages, enter analysis mode, and then group, filter, and pivot data as you see fit

You can use the **open in Excel** action to open a list page, optionally filter the list to a subset of the data, and then use Excel to work with the data

Let Copilot calculate, summarize, and examine data with **analysis assist**



Typical analytics needs in organizations + tools



Financial analytics

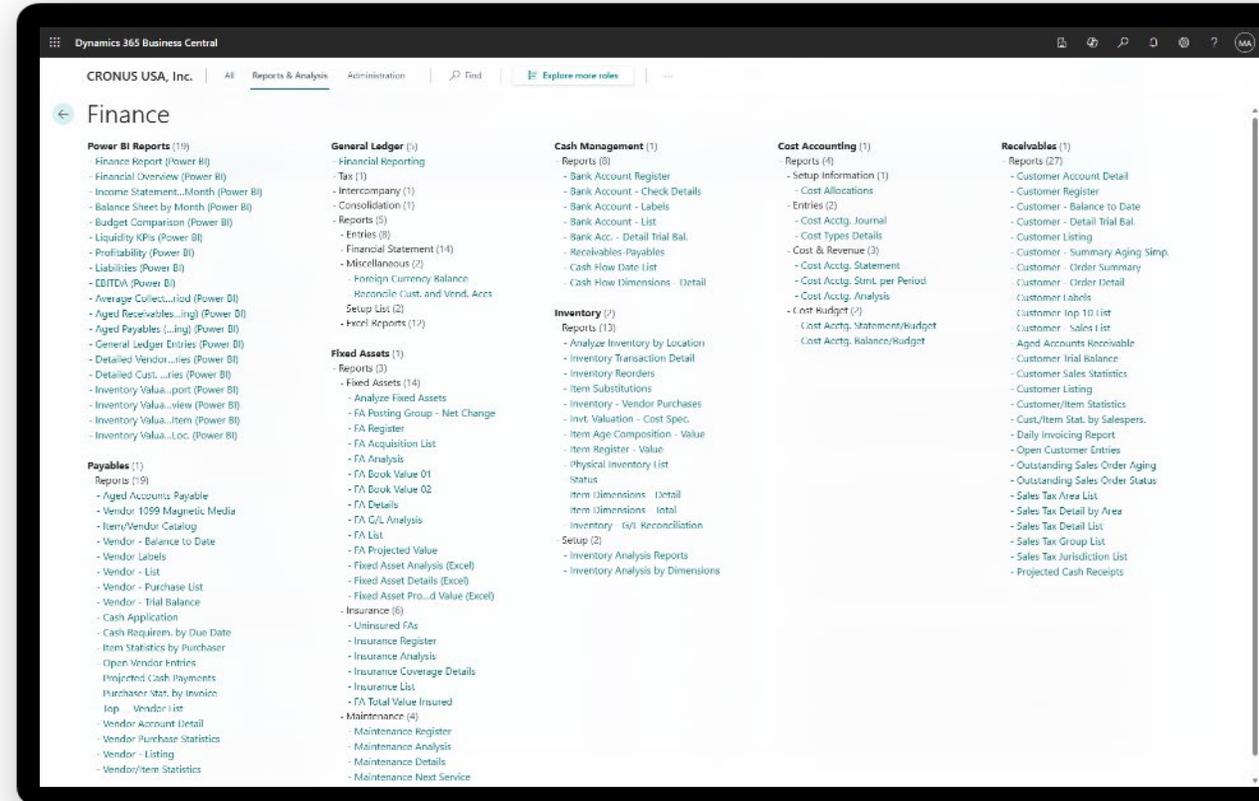


Business Central offers features to help you gather, analyze, and share your organization's finance data:

- Financial reporting (for financial statements and KPIs)
- Power BI reports for finance
- Ad-hoc analysis on lists
- Ad-hoc analysis of data in Excel (using open in Excel)
- Built-in finance reports

During daily activities, businesses capture lots of data that can support business intelligence (BI) for decision makers:

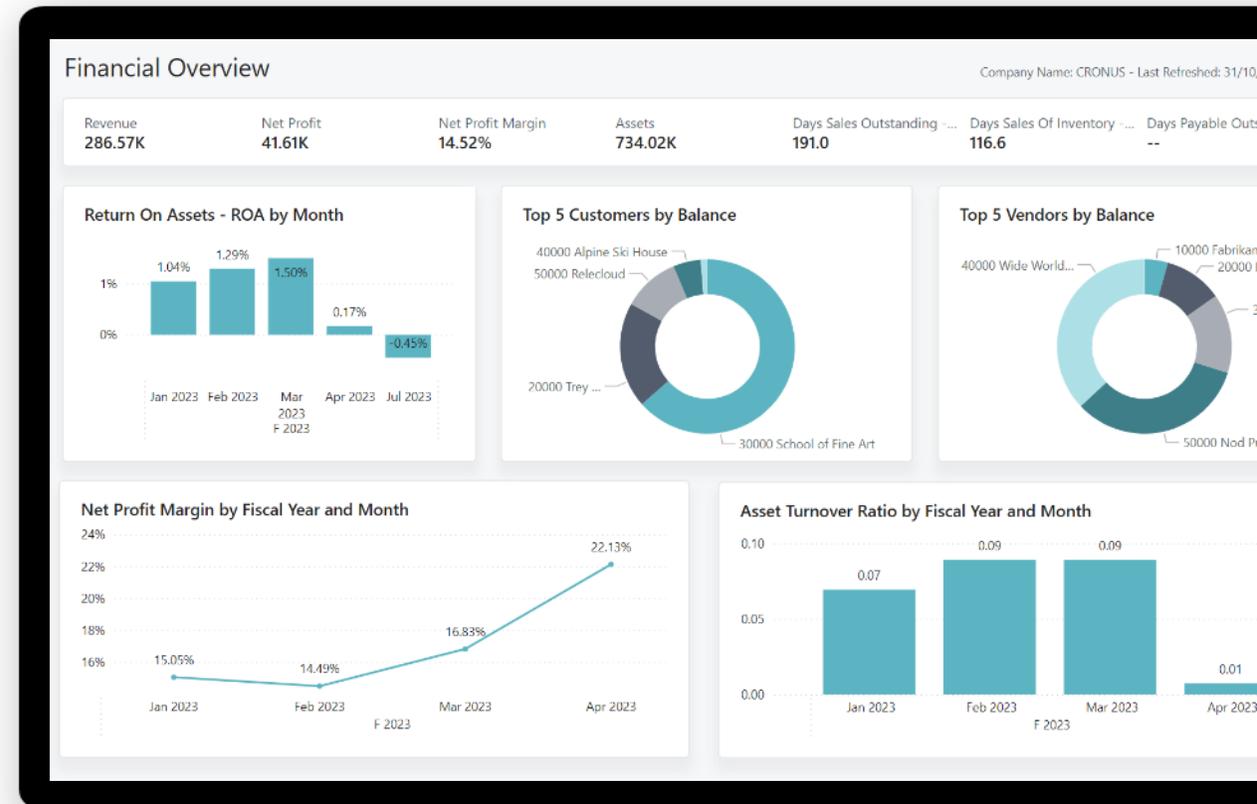
- Sales figures
- Purchases
- Operational expenses
- Employee salaries
- Budgets



Power BI app for finance

Power BI reports available for finance:

- Financial overview
- Income statement
- Balance sheet
- Budget comparison
- Liquidity KPIs
- [Profitability](#)
- Liabilities
- EBITDA
- [Average collection period](#)
- Aged receivables (back dating)
- Aged payables (back dating)
- Detailed vendor ledger entries
- Detailed customer ledger entries
- General ledger entries
- [Late payments \(receivables\)](#)



* All these reports are available in Business Central – a few were chosen for this presentation

Financial reporting

You can export your reports to Excel and format them

Out of the box financial reporting

Business Central provides account categories, subcategories, and mappings to the company's chart of accounts for basic financial reporting. Get a comprehensive view of a company's financial health with financial statements.

Comparative views

Beyond monthly balances or net changes, you can apply multiple views to any report you create.

Use dimensions

Dimensions are data tags you can attach to postings to the general ledger to provide more business insights to financial reporting.

Ability to drill down

Numbers in financial reporting that aren't calculated by a formula can take you to the original transactions.

Custom financial reporting

If you're already familiar with financial reporting and you want more complex reports, you can create your own.

Posting Date	Document Type	Document No.	G/L Account No.	Description	Department Code	Customer Group Code	Gen. Posting Type	Gen. Bus. Posting Group	Prod. Posting Group
22/01/2023	PS-INV100007	54130		Direct Cost 10000 + SALES		SMALL			
22/01/2023	PS-INV100006	54130		Direct Cost 20000 + SALES		MEDIUM			
22/01/2023	PS-INV100006	54130		Direct Cost 20000 + SALES		MEDIUM			
22/01/2023	PS-INV100006	54130		Direct Cost 20000 + SALES		MEDIUM			
21/01/2023	PS-INV100005	54130		Direct Cost 40000 + SALES		SMALL			
20/01/2023	PS-INV100004	54130		Direct Cost 50000 + SALES		MEDIUM			
19/01/2023	PS-INV100003	54130		Direct Cost 30000 + SALES		LARGE			
18/01/2023	PS-INV100002	54130		Direct Cost 10000 + SALES		SMALL			
17/01/2023	PS-INV100001	54130		Direct Cost 20000 + SALES		MEDIUM			
16/01/2023	100029	54130		Direct Cost 30000 €					
15/01/2023	100028	54130		Direct Cost 30000 €					
15/01/2023	100027	54130		Direct Cost 40000 €					
14/01/2023	100026	54130		Direct Cost 40000 €					
14/01/2023	100025	54130		Direct Cost 30000 €					
13/01/2023	100024	54130		Direct Cost 30000 €					
12/01/2023	100023	54130		Direct Cost 50000 €					
11/01/2023	100022	54130		Direct Cost 10000 €					
11/01/2023	100021	54130		Direct Cost 50000 €					
11/01/2023	100021	54130		Direct Cost 50000 €					
10/01/2023	100020	54130		Direct Cost 20000 €					
09/01/2023	100019	54130		Direct Cost 30000 €					
09/01/2023	100018	54130		Direct Cost 40000 €					
09/01/2023	100017	54130		Direct Cost 20000 €					
09/01/2023	100017	54130		Direct Cost 20000 €					
01/01/2023	100011	54130		Direct Cost 10000 €					
01/01/2023	100010	54130		Direct Cost 20000 €					
01/01/2023	100009	54130		Direct Cost 40000 €					
01/01/2023	100008	54130		Direct Cost 20000 €					
01/01/2023	100007	54130		Direct Cost 10000 €					
01/01/2023	100006	54130		Direct Cost 40000 €					
01/01/2023	100005	54130		Direct Cost 50000 €					
01/01/2023	100004	54130		Direct Cost 40000 €					
01/01/2023	100003	54130		Direct Cost 50000 €					
01/01/2023	100002	54130		Direct Cost 30000 €					
01/01/2023	100001	54130		Direct Cost 20000 €					

Detail Trial Balance

Tuesday, May 13, 2025

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ADMIN

Period:
CRONUS USA, Inc.

This also includes general ledger accounts that only have a balance.

						Net Change		
Posting Date	Document No.	External Document No.	Description	Tax Amount	Debit	Credit	Balance	
14130 Finished Goods								0.00
01/01/23	108001		Direct Cost 20000 on 01/01/23	0.00	3,122.80		3,122.80	
01/01/23	108002		Direct Cost 30000 on 01/01/23	0.00	1,691.00		4,813.80	
01/01/23	108003		Direct Cost 50000 on 01/01/23	0.00	444.30		5,258.10	
01/01/23	108004		Direct Cost 40000 on 01/01/23	0.00	342.40		5,600.50	
01/01/23	108005		Direct Cost 50000 on 01/01/23	0.00	1,503.00		7,103.50	
01/01/23	108006		Direct Cost 40000 on 01/01/23	0.00	300.60		7,404.10	
01/01/23	108007		Direct Cost 10000 on 01/01/23	0.00	601.20		8,005.30	
01/01/23	108008		Direct Cost 20000 on 01/01/23	0.00	1,481.00		9,486.30	
01/01/23	108009		Direct Cost 40000 on 01/01/23	0.00	296.20		9,782.50	
01/01/23	108010		Direct Cost 20000 on 01/01/23	0.00	444.30		10,226.80	
01/01/23	108011		Direct Cost 10000 on 01/01/23	0.00	740.50		10,967.30	
01/08/23	108017		Direct Cost 20000 on 01/08/23	0.00	740.50		11,707.80	
01/08/23	108017		Direct Cost 20000 on 01/08/23	0.00	751.50		12,459.30	
01/08/23	108018		Direct Cost 40000 on 01/08/23	0.00	2,527.00		14,986.30	
01/09/23	108019		Direct Cost 30000 on 01/09/23	0.00	1,036.70		16,023.00	
01/10/23	108020		Direct Cost 20000 on 01/10/23	0.00	888.60		16,911.60	
01/11/23	108021		Direct Cost 50000 on 01/11/23	0.00	1,202.40		18,114.00	
01/11/23	108021		Direct Cost 50000 on 01/11/23	0.00	592.40		18,706.40	
01/11/23	108022		Direct Cost 10000 on 01/11/23	0.00	1,202.40		19,908.80	
01/12/23	108023		Direct Cost 50000 on 01/12/23	0.00	7,026.30		26,935.10	
01/13/23	108024		Direct Cost 20000 on 01/13/23	0.00	1,052.10		27,987.20	
01/14/23	108025		Direct Cost 30000 on 01/14/23	0.00	428.00		28,415.20	
01/14/23	108026		Direct Cost 40000 on 01/14/23	0.00	7,629.30		36,044.50	

Trial Balance vs. Budget

CRONUS USA, Inc.

Data retrieved: 17 December 2024, 23:25

No.	Name	Account Type	Net Change	% of Budget Net	Net Budget	Balance	% of Budget Bal.	Budget Balance
10000	BALANCE SHEET	Heading	0.00	0.00%	0.00	0.00	0.00%	0.00
10001	ASSETS	Begin-Total	0.00	0.00%	0.00	0.00	0.00%	0.00
10100	Checking account	Posting	181,842.72	0.00%	0.00	181,842.72	0.00%	0.00
10200	Saving account	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10300	Petty Cash	Posting	1,224,787.68	0.00%	0.00	1,224,787.68	0.00%	0.00
10400	Accounts Receivable	Posting	990,372.32	0.00%	0.00	990,372.32	0.00%	0.00
10500	Prepaid Rent	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10600	Prepaid Insurance	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10700	Inventory	Posting	727,120.32	0.00%	0.00	727,120.32	0.00%	0.00
10750	WIP Account, Finished goods	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10800	Equipment	Posting	1,859,200.00	0.00%	0.00	1,859,200.00	0.00%	0.00
10900	Accumulated Depreciation	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10910	WIP Job Sales	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10920	Invoiced Job Sales	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10940	Accrued Job Costs	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10950	WIP Job Costs	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
10990	TOTAL ASSETS	End-Total	4,983,323.04	0.00%	0.00	4,983,323.04	0.00%	0.00
14110	Raw Materials	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
14140	Direct Cost Applied, Retail	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
15110	Customers Domestic	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
20001	LIABILITIES	Begin-Total	0.00	0.00%	0.00	0.00	0.00%	0.00
20100	Accounts Payable	Posting	-990,777.76	0.00%	0.00	-990,777.76	0.00%	0.00
20200	Purchase Discounts	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00
20300	Purchase Returns & Allowances	Posting	0.00	0.00%	0.00	0.00	0.00%	0.00

Department Code

- ADM
- BLANK
- PROD
- SALES

Customergroup

- BLANK
- LARGE
- MEDIUM
- SMALL

Account Category

- Assets
- Cost of Goods Sold
- Equity
- Expense
- Income
- Liabilities

Account Subcat...

- Accounts Receivable
- Accumulated Depreci...
- Advertising Expense
- Assets
- Bad Debt Expense
- Cash
- Common Stock

Customer Ledger Entries



Aged accounts by month



	2021 >	2022 <			
		January	February	March	April
Customer Name	Sum(Remaining)	Sum(Remaining)	Sum(Remaining)	Sum(Remaining)	Sum(Remaining)
Relecloud (83)	0.00	2,877.48	2,877.48	3,081.84	
Alpine Ski House (55)	0.00	0.00	4,316.92		
School of Fine Art (113)	0.00	20,409.93	19,944.69	2,039.85	
Trey Research (101)	0.00	809.76	1,214.64	1,012.20	
Adatum Corporation (68)	0.00	0.00	0.00		
Adatum Corporation - Discu... (1)					
Total	0.00	24,097.17	28,353.73	6,133.89	

Pivot Mode

Search...

Columns

- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Document Date
- Document Date Year
- Document Date Quarter
- Document Date Month
- Document Type

Analysis Filters

Row Groups

- Customer Name

Values

- Sum(Remaining Amount)

Column Labels

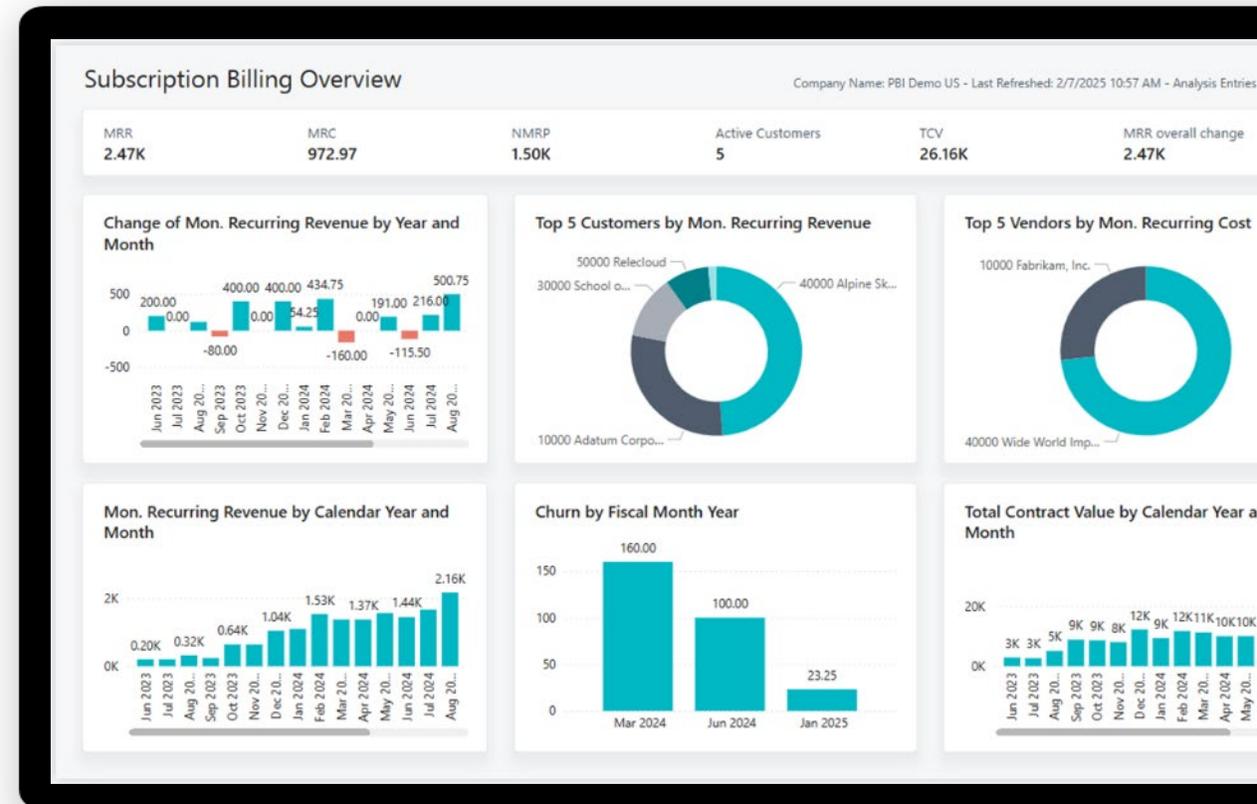
- Due Date Year
- Due Date Month

Create new analysis

Power BI app for subscription billing

Power BI reports available for subscription billing:

- Subscription overview
- Revenue year-over-year
- Revenue analysis
- [Revenue development](#)
- Churn analysis
- Revenue by item
- Revenue by customer
- Revenue by salesperson
- [Total contract value year-over-year](#)
- Total contract value analysis
- [Customer deferrals](#)
- Vendor deferrals
- [Sales and cost forecast](#)
- Billing schedule



* All these reports are available in Business Central – a few were chosen for this presentation

Sales analytics

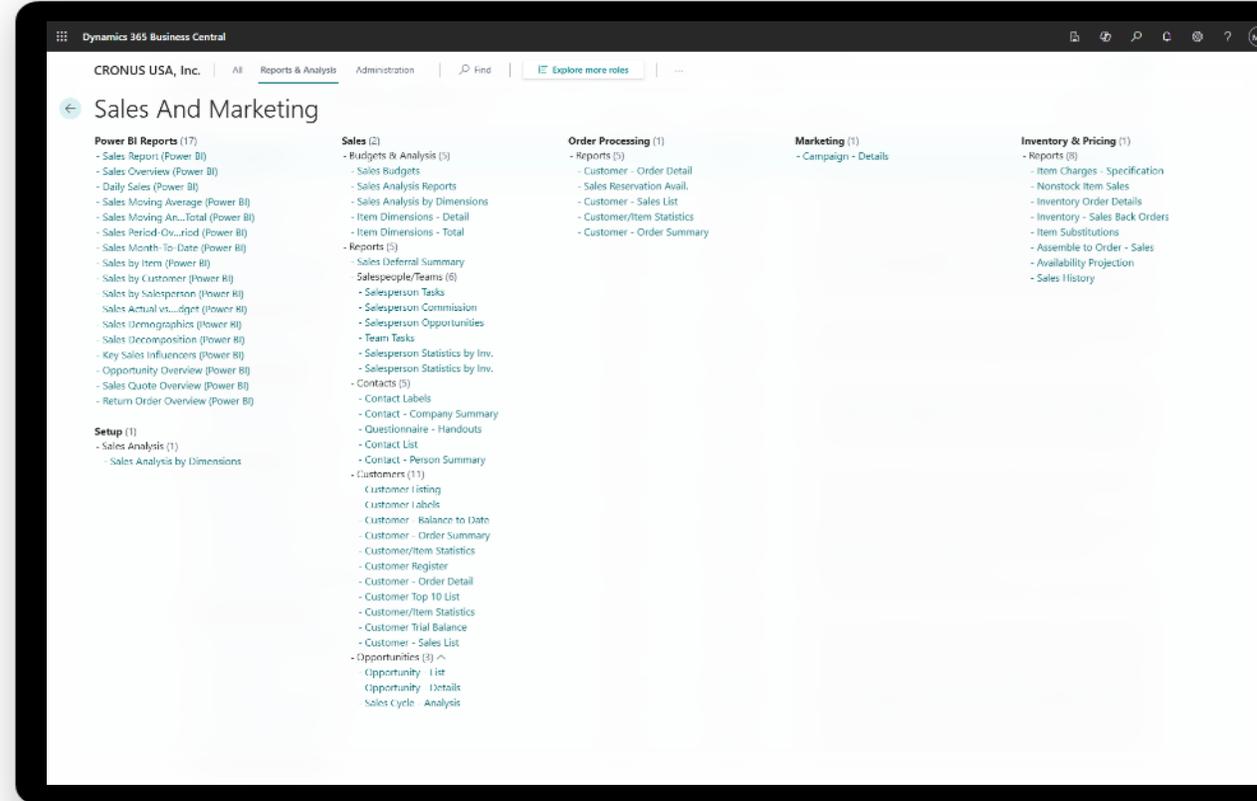


Business Central provides features to help you gather, analyze, and share your organization's sales data:

- Power BI reports for sales
- Ad-hoc analysis on lists
- Ad-hoc analysis of data in Excel
- Built-in sales analytics tools
- Built-in sales reports

Businesses capture lots of data during daily activities that supports business intelligence (BI) for sales managers:

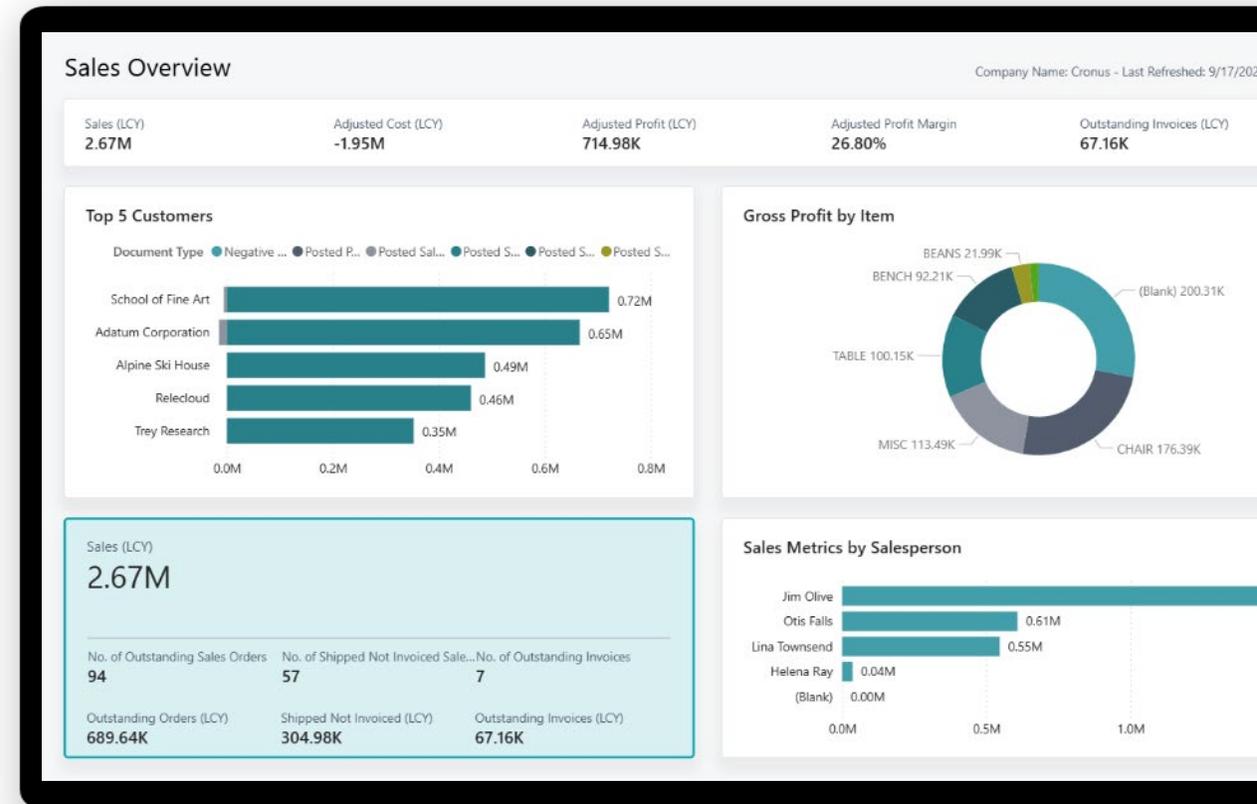
- Opportunities
- Sales quotes
- Sales orders
- Sales invoices



Power BI app for sales

Power BI reports available for sales:

- Sales overview
- Daily sales
- Moving average
- Moving annual total
- Period-over-period growth
- Month-to-date
- [Sales by item](#)
- Sales by customer
- Sales by salesperson
- Sales by location
- Sales by project
- [Actual vs. budget](#)
- [Opportunity overview](#)
- Sales quote overview
- Return order overview
- Sales demographics
- Sales decomposition
- [Key sales influencers](#)
- [Sales forecasting](#)



* All these reports are available in Business Central – a few were chosen for this presentation

Customer Ledger Entries

Search Analyse **Customer by sales volume** +

Customer Name	Document No.	Sum(Amount)	Sum(Remaining
> Relecloud (83)		8,836.80	8,836.80
> Alpine Ski House (55)		4,316.92	4,316.92
> School of Fine Art (112)		53,833.52	53,833.52
> Trey Research (101)		4,214.60	4,214.60
> Adatum Corporation (68)		2,122.76	2,122.76
▼ Adatum Corporation - Discussion (1)			
	PS-INV103218	12.72	12.72
Sub Total Adatum Corporation - Discussion		12.72	12.72
Total		73,337.32	73,337.32

Pivot Mode

Search...

Posting Date

Posting Date Year

Posting Date Quarter

Posting Date Month

Document Date

Document Date Year

Document Date Quar...

Document Date Month

Document Type

Document No.

Customer No.

Customer Name

Description

Department Code

Customergroup Code

Currency Code

Row Groups

Customer Name

Values

Sum(Amount)

Sum(Remaining Am...)

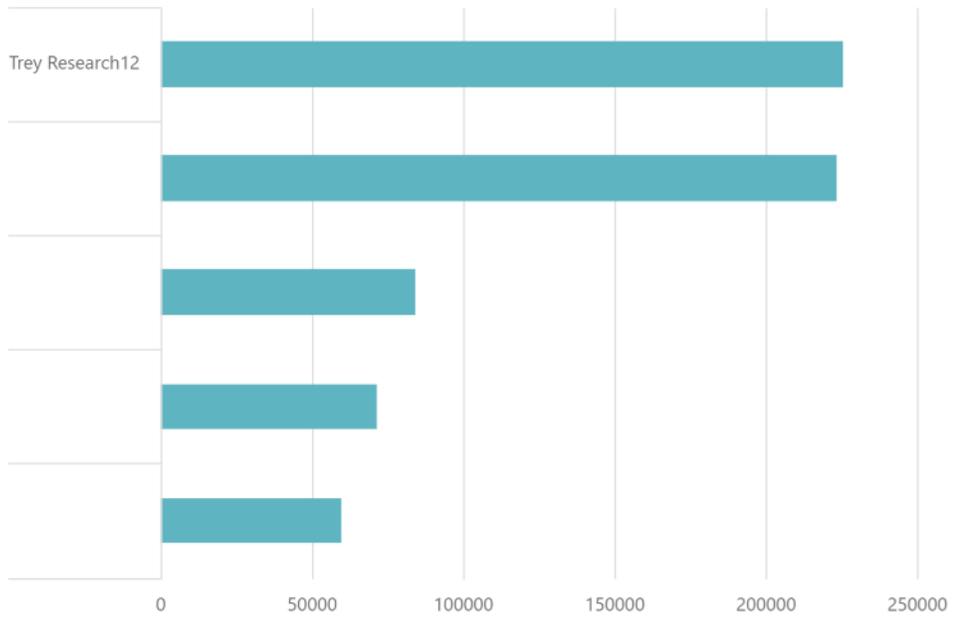
Columns

Analysis Filters

Top Customer List

CRONUS USA, Inc.
Data retrieved: 16 December 2024, 22:18
Rank according to: Sales (LCY)

Customer No	Name	Sales (LCY)	Balance (LCY)
10000	Adatum Corporation	225,613.00	2,135.48
30000	School of Fine Art	223,316.70	42,394.47
50000	Relecloud	83,956.40	8,836.80
40000	Alpine Ski House	71,453.00	4,316.92
20000	Trey Research12	59,793.00	4,214.60
Grand Total		664,132.10	61,898.27



Purchasing analytics

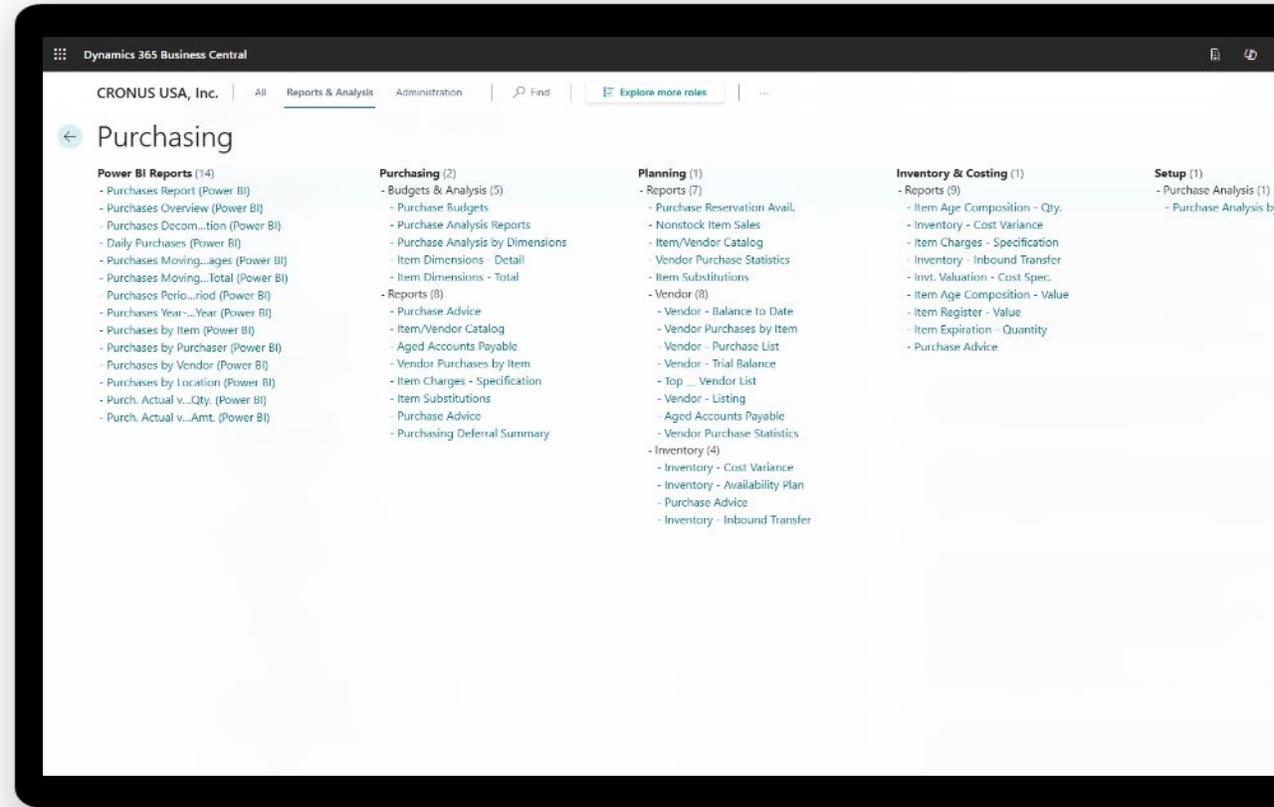


Business Central provides features to help you gather, analyze, and share your organization's purchasing data:

- Power BI reports for purchasing
- Ad-hoc analysis on lists
- Ad-hoc analysis of data in Excel (using open in Excel)
- Built-in sales reports

Businesses capture lots of data during daily activities that supports business intelligence (BI) for purchasing managers:

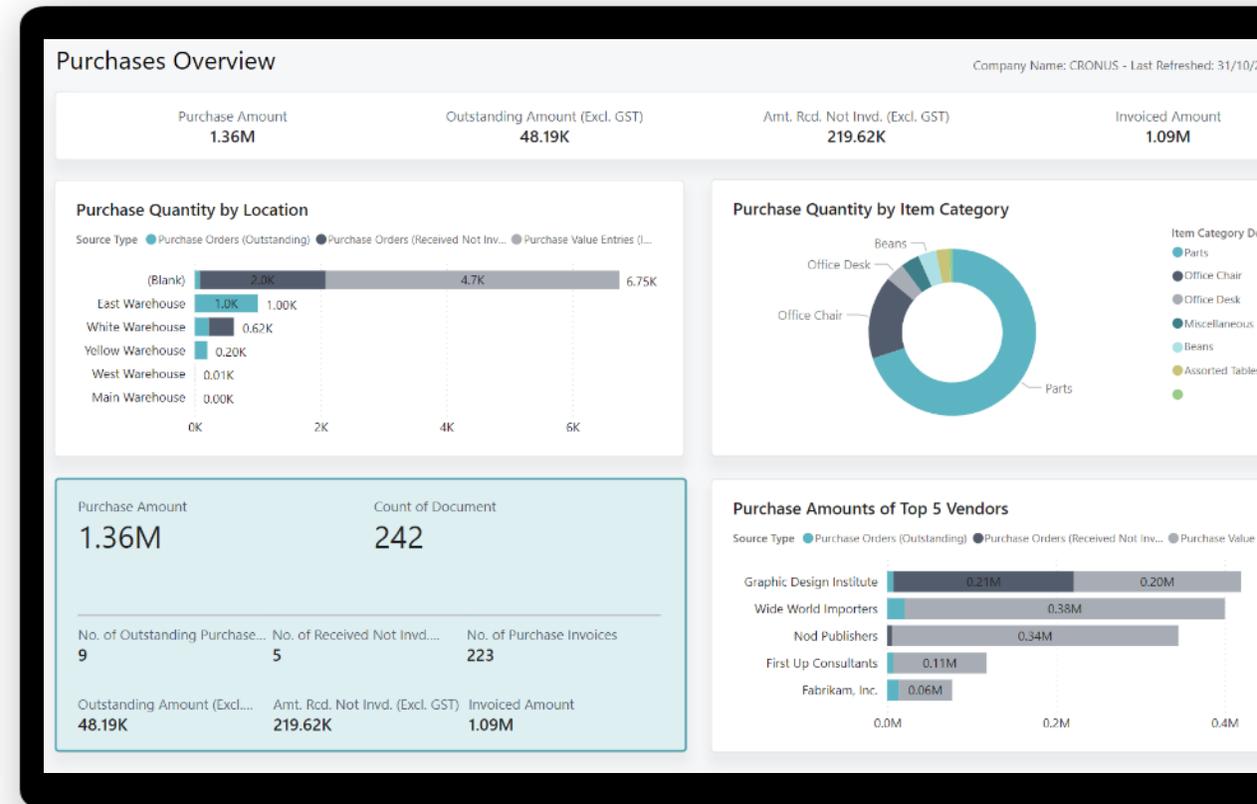
- Purchase quotes
- Purchase orders
- Purchase invoices



Power BI app for purchasing

Power BI reports available for purchasing:

- Purchases overview
- Purchase decomposition
- Daily purchases
- Moving averages
- Moving annual total
- Period-over-period
- Year-over-year
- [Purchases by item](#)
- [Purchases by vendor](#)
- Purchases by purchaser
- Purchases by location
- Actual vs. budget
- [Purchase returns overview](#)
- Purchase quote overview
- Key purchase influencers
- Purchase forecasting
- [Vendor quality analysis](#)



* All these reports are available in Business Central – a few were chosen for this presentation

CRONUS USA, Inc.

Finance

Cash Management

Sales

Purchasing

Shopify

All Reports

so+

Purchase Lines: All

Goods Received, Not Invoiced

+

Buy-from Vendor No. /...	Type	Sum(Amt.)
20000 (11)		
> 106009 (3)		16,000.00
> 106010 (8)		64,470.00
Sub Total 20000		80,470.00
40000 (8)		
> 106011 (2)		3,035.00
> 106012 (6)		39,210.00
Sub Total 40000		42,245.00
50000 (5)		
> 106013 (4)		22,000.00
> 106014 (1)		5,780.00
Sub Total 50000		27,780.00
Total		150,495.00

Pivot Mode

Search...

Document Type
 Buy-from Vendor No.
 Document No.
 Type
 No.
 Description
 Location Code
 Quantity
 Reserved Qty. (Base)
 Unit of Measure Code
 Direct Unit Cost Excl. ...
 Line Amount Excl. Tax

Row Groups

- Buy-from Vendor No. (X)
- Document No. (X)
- No. (X)

Values

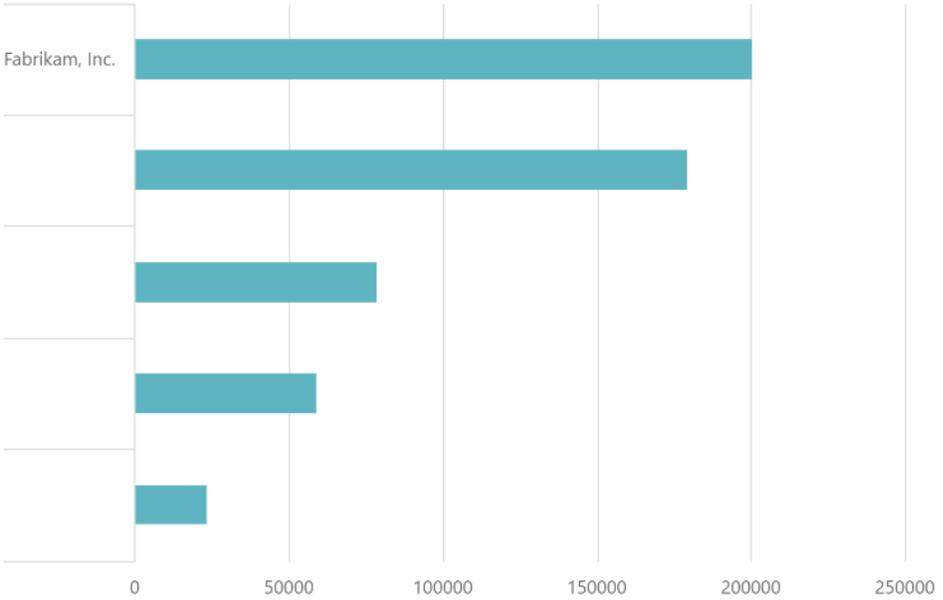
- Sum(Quantity) (X)
- Sum(Reserved Q... (X)
- Sum(Direct Unit ... (X)

Create new analysis

Top Vendor List

CRONUS USA, Inc.
 Data retrieved: 15 December 2024, 14:00
 Rank according to: Purchases (LCY)

Vendor No.	Name	Purchases (LCY)	Balance (LCY)
40000	Wide World Importers	200,584.30	18,193.10
50000	Nod Publishers	179,352.50	17,273.87
30000	Graphic Design Institute	78,445.70	6,979.57
20000	First Up Consultants	59,060.70	5,354.78
10000	Fabrikam, Inc.	23,193.60	3,652.34
Grand Total		540,636.80	51,453.66



Projects analytics

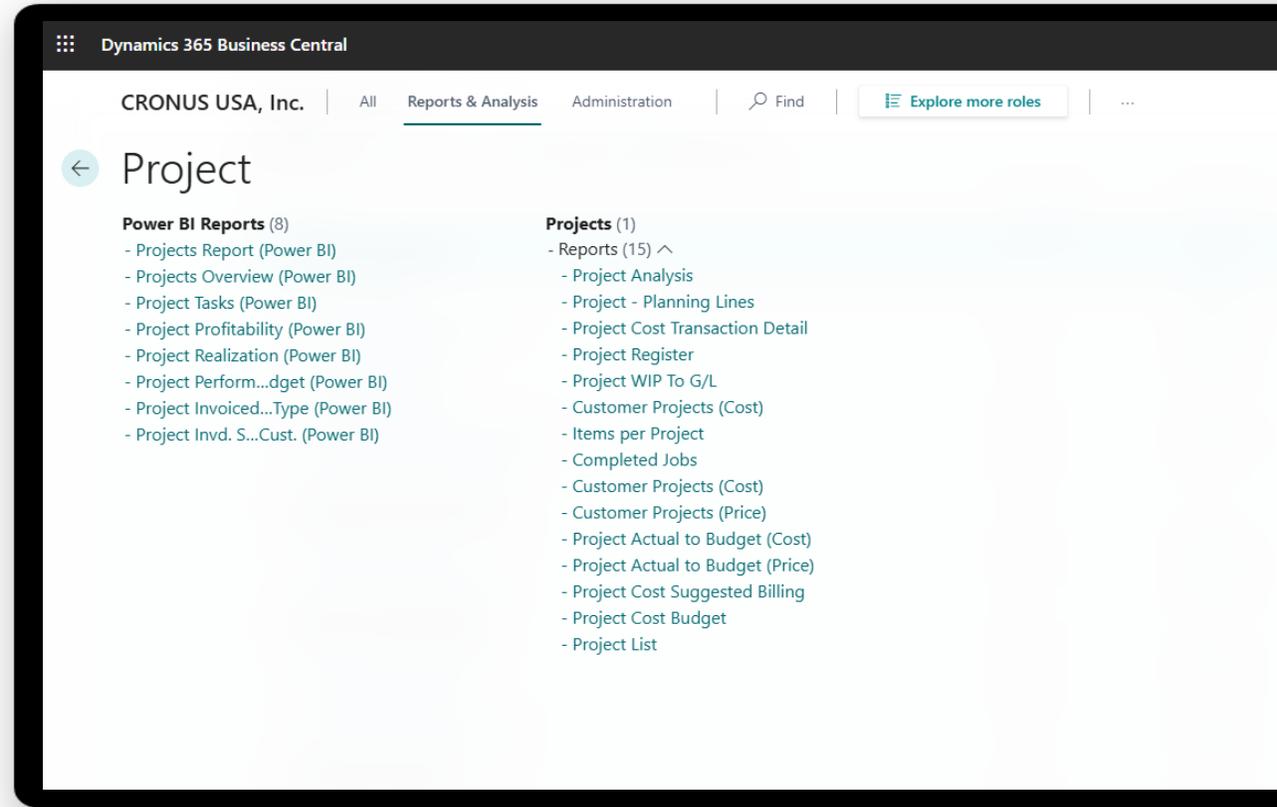


Business Central provides features to help you gather, analyze, and share your organization's project data:

- Power BI reports for projects
- Ad-hoc analysis on lists
- Ad-hoc analysis of data in Excel (using Open in Excel)
- Built-in project analytics tools
- Built-in project reports

Businesses capture lots of data during daily activities that supports business intelligence (BI) for project managers, such as:

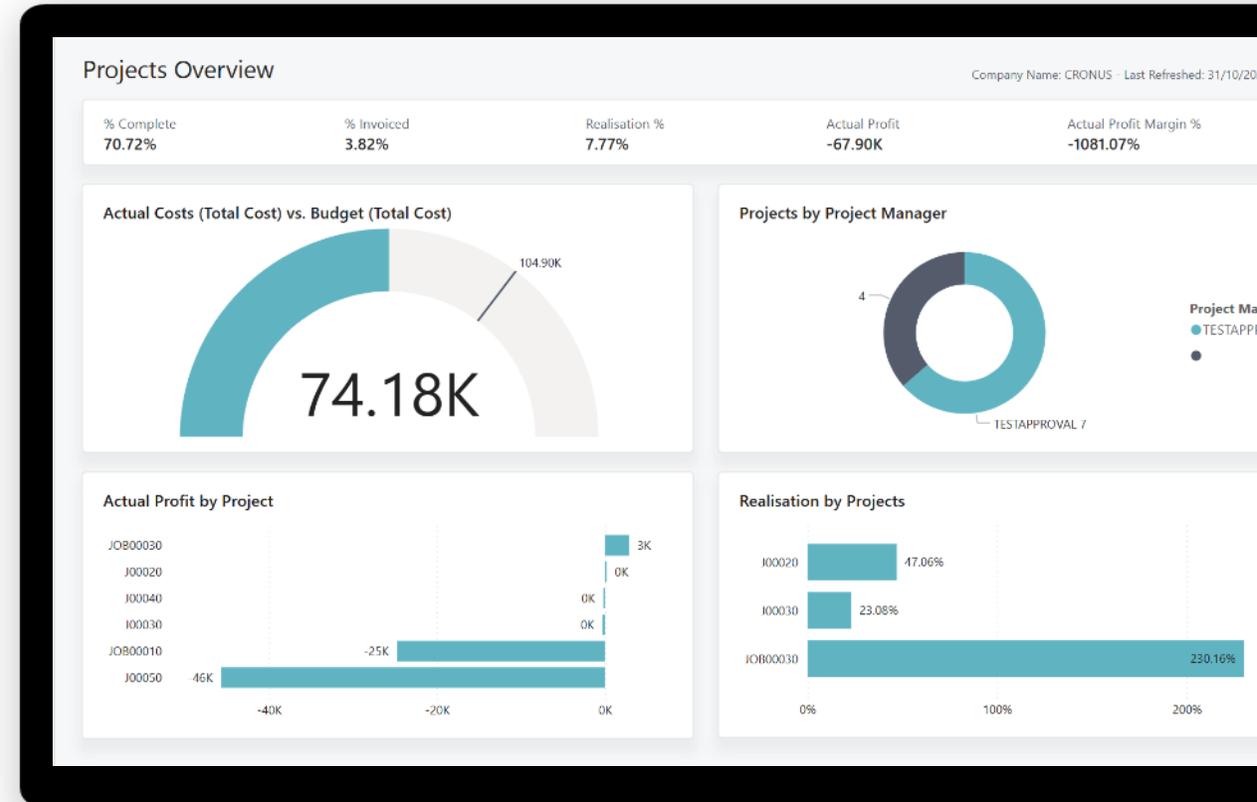
- Cost performance for projects
- Completion rates for projects
- Financial data for projects



Power BI app for projects

Power BI reports available for projects:

- Project overview
- Project tasks
- [Project profitability](#)
- Project realization
- Project performance to budget
- [Project invoiced sales by type](#)
- Project invoiced sales by customer
- [Project timeline](#)



* All these reports are available in Business Central – a few were chosen for this presentation

Project Planning Lines

CRONUS UK Ltd.

22 December 2024

Page 1

User name

Project No. PR00010 Installation of S-200 Semi-Automatic

Line Type	Planning Date	Type	Document No.	No.	Description	Quantity	Unit of Measure Code	Total Cost (GBP)	Line Discount Amount (GBP)	Line Amount (GBP)	
Project Task No.		110		Pre-installation requirements							
Budget	21/12/24	Resource		RESOU	RESOURCE3	3	HOUR	210.00	0.00	300.00	
Billable	21/12/24	Item		SER203	Pre-installation requirements	3	HOUR	0.00	0.00	300.00	
Billable	21/12/24	Text			Check-list:	0		0.00	0.00	0.00	
Billable	21/12/24	Text			* Space constraints	0		0.00	0.00	0.00	
Billable	21/12/24	Text			* Water quality, inlet, drain out	0		0.00	0.00	0.00	
Billable	21/12/24	Text			* Electrical requirements	0		0.00	0.00	0.00	
								Budget	210.00	0.00	300.00
								Billable	0.00	0.00	300.00
Project Task No.		220		Delivery							
Bud.+Bill.	21/12/24	Item		S-210	S-210 Semi-Automatic	1	PCS	0.00	0.00	2,400.00	
								Budget	210.00	0.00	2,700.00
								Billable	0.00	0.00	2,700.00
Project Task No.		240		Installation							
Budget	21/12/24	Resource		RESOU	RESOURCE3	3	HOUR	210.00	0.00	300.00	
Billable	21/12/24	Item		SER203	Installation	2	HOUR	0.00	0.00	200.00	
Budget	21/12/24	Item		F-100	Remote pump	1	PCS	0.00	0.00	100.00	
								Budget	420.00	0.00	3,100.00
								Billable	0.00	0.00	2,900.00
Project Task No.		260		Configuration							
Budget	21/12/24	Resource		RESOU	RESOURCE3	1	HOUR	70.00	0.00	100.00	
Billable	21/12/24	Item		SER203	Configuration	2	HOUR	0.00	0.00	200.00	
								Budget	490.00	0.00	3,200.00
								Billable	0.00	0.00	3,100.00
								Total Budget	490.00	0.00	3,200.00
								Total Billable	0.00	0.00	3,100.00

Inventory analytics

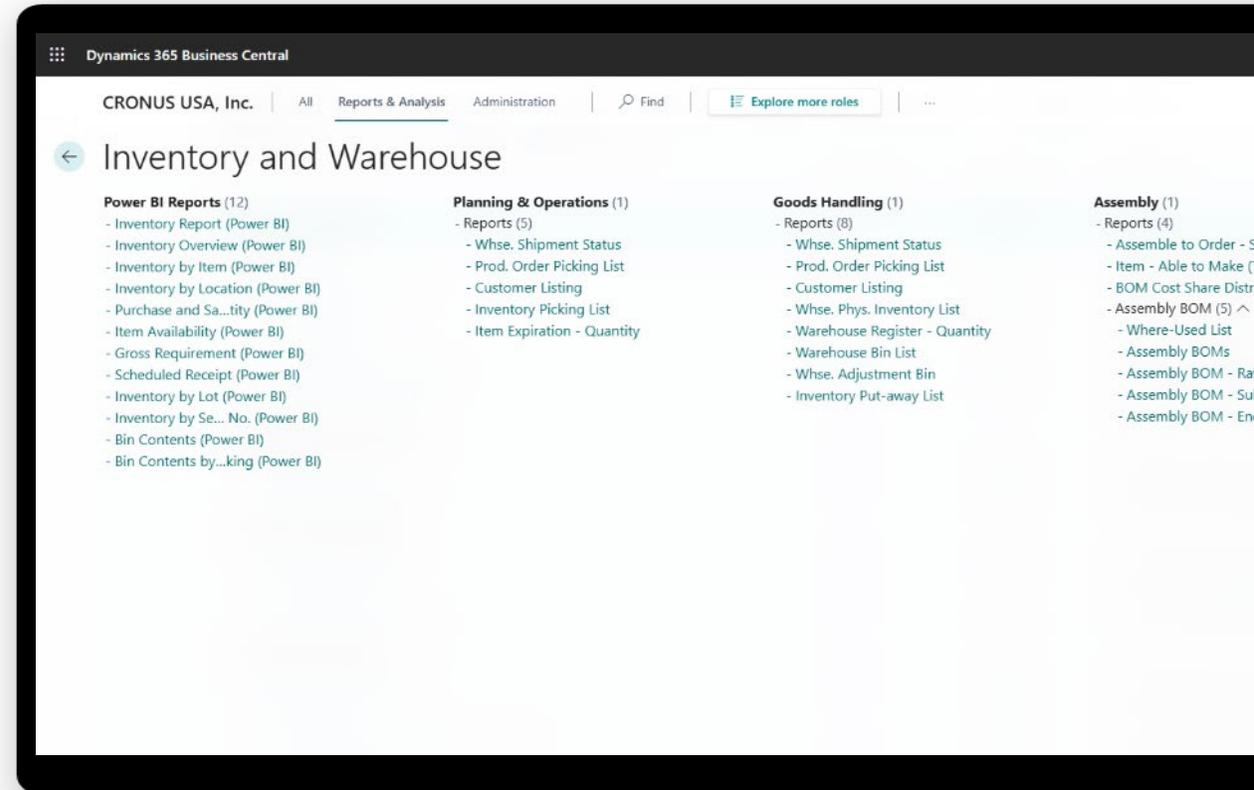


Business Central provides features to help you gather, analyze, and share your organization's inventory data:

- Power BI reports for inventory
- Ad-hoc analysis on lists
- Ad-hoc analysis of data in Excel (using Open in Excel)
- Built-in project analytics tools
- Built-in project reports

Businesses capture lots of data during daily activities that supports business intelligence (BI) for inventory managers, such as:

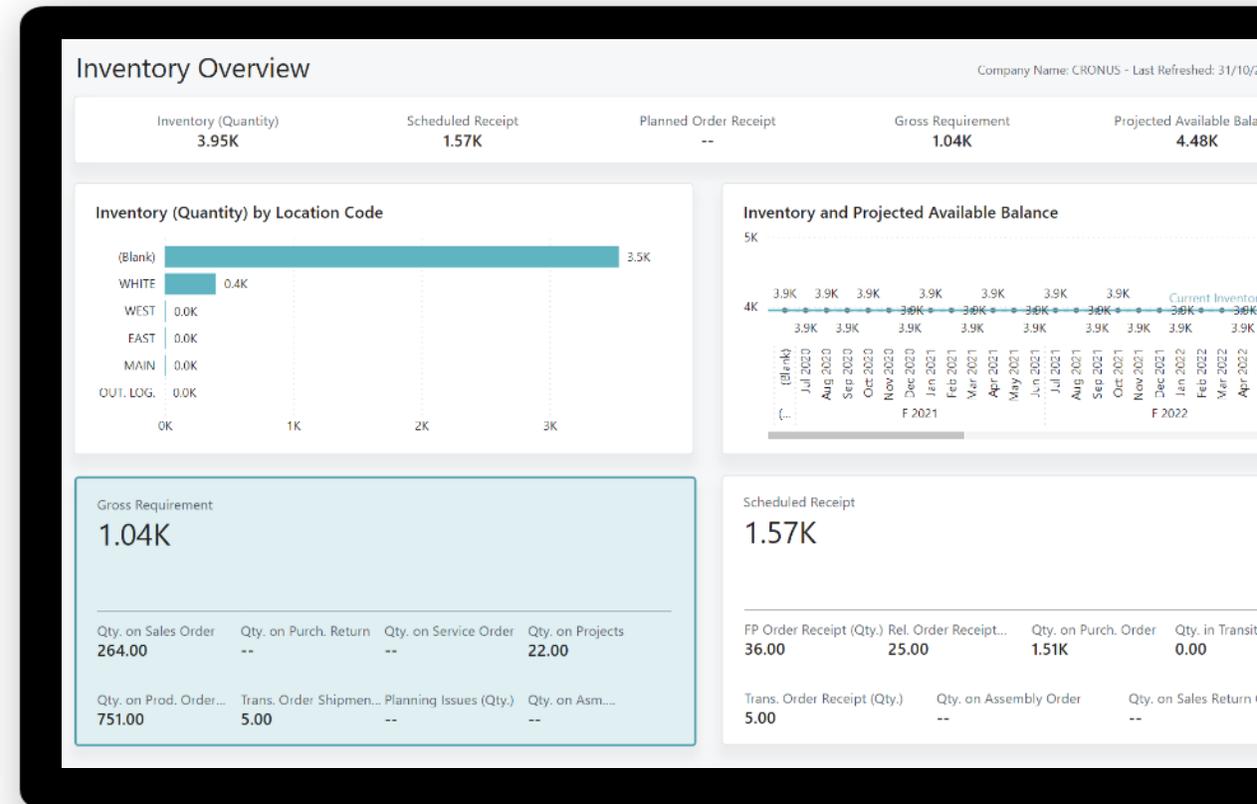
- Shipping of goods when sales orders are fulfilled
- Receipts of items when purchase orders are fulfilled
- Movements of items between locations



Power BI app for inventory

Power BI reports available for inventory:

- Inventory overview
- Inventory by item
- Inventory by location
- [Purchase and sales quantity](#)
- [Item availability](#)
- Gross requirement
- Scheduled receipt
- [Inventory by lot](#)
- Inventory by serial number
- Bin contents
- Bin contents by item tracking
- [Inventory forecasting](#)
- Inventory valuation overview
- Inventory valuation by item
- Inventory valuation by location



* All these reports are available in Business Central – a few were chosen for this presentation

CRONUS USA, Inc.

- Sales & Purchases
- Jobs
- Resources
- Journals
- Posted Documents
- All Reports

Item Ledger Entries: All Search Analyse Dead stock Inventory on Hand +



Item No. ↑	Sum(Remaining)
> 1000 (3)	3.00
> 1001 (2)	101.00
> 1006 (1)	10.00
> 1008 (1)	7.00
> 1017 (1)	5.00
> 1018 (1)	79.40
> 1021 (1)	10.00
> 1022 (1)	10.00
> 1896-S (3)	4.00
> 1906-S (1)	5.00
> 1908-S (1)	3.00
> 1920-S (2)	10.00
> 1928-S (1)	8.00
> 1936-S (12)	100.00
> 1953-W (4)	-49.00
> 1960-S (1)	2.00
> 1964-S (2)	7.00
> 1965-W (10)	-81.00
> 1968-S (4)	10.00
> 1969-W (2)	-7.00
> 1996-S (1)	10.00
> 2000-S (7)	38.00

Columns

- Customergroup Code
- Package No.
- Location Code
- Quantity
- Invoiced Quantity
- Sales Amount (Actual)
- Remaining Quantity ▾
- Not equal ▾
- 0
- AND OR
- Equals ▾
- Filter...
- Cost Amount (Actual)
- Cost Amount (Non-Invtbl.)
- Open
- Order Type
- Entry No.
- Shortcut Dimension 3 Code
- Shortcut Dimension 4 Code
- Shortcut Dimension 5 Code
- Shortcut Dimension 6 Code
- Shortcut Dimension 7 Code
- Shortcut Dimension 8 Code

Inventory - Sales Back Orders

CRONUS USA, Inc.

Friday, May 16, 2025

Page 1

ADMIN

Item No.	Document No.	Customer	Phone No.	Shipment Date	Quantity	Outstanding Quantity	Other Back Orders
1906-S	ATHENS Mobile Pedestal						
	S-ORD1010	Alpine Ski House		05/10/25	40	40	True
	ATHENS Mobile Pedestal					40	
1920-S	ANTWERP Conference Table						
	S-ORD1010	School of Fine Art		04/19/25	8	8	False
	ANTWERP Conference Table					8	
1928-S	AMSTERDAM Lamp						
	S-ORD1010	Adatum Corporation		04/28/25	7	7	True
	AMSTERDAM Lamp					7	
1968-S	MEXICO Swivel Chair, black						
	S-ORD1010	Adatum Corporation		04/28/25	10	10	True
	MEXICO Swivel Chair, black					10	
1996-S	ATLANTA Whiteboard, base						
	S-ORD1010	Adatum Corporation		03/30/25	12	12	True
	ATLANTA Whiteboard, base					12	
2000-S	SYDNEY Swivel Chair, green						
	S-ORD1010	Alpine Ski House		05/10/25	10	10	True
	SYDNEY Swivel Chair, green					10	
S-100	S-100 Semi-Automatic						
	S-ORD1010	Adatum Corporation		01/21/25	1	1	True
	S-100 Semi-Automatic					1	
WRB-1000	Whole Roasted Beans, Colombia						
	S-ORD1010	Adatum Corporation		01/21/25	2	2	True
	S-ORD1010	Adatum Corporation		01/21/25	20	20	True
	S-ORD1010	Adatum Corporation		01/21/25	30	30	True
	Whole Roasted Beans, Colombia					52	
WRB-1001	Whole Roasted Beans, Brazil						
	S-ORD1010	Adatum Corporation		01/21/25	2	2	True
	S-ORD1010	Adatum Corporation		01/21/25	10	10	True
	S-ORD1010	Adatum Corporation		01/21/25	20	20	True
	Whole Roasted Beans, Brazil					32	

Manufacturing analytics

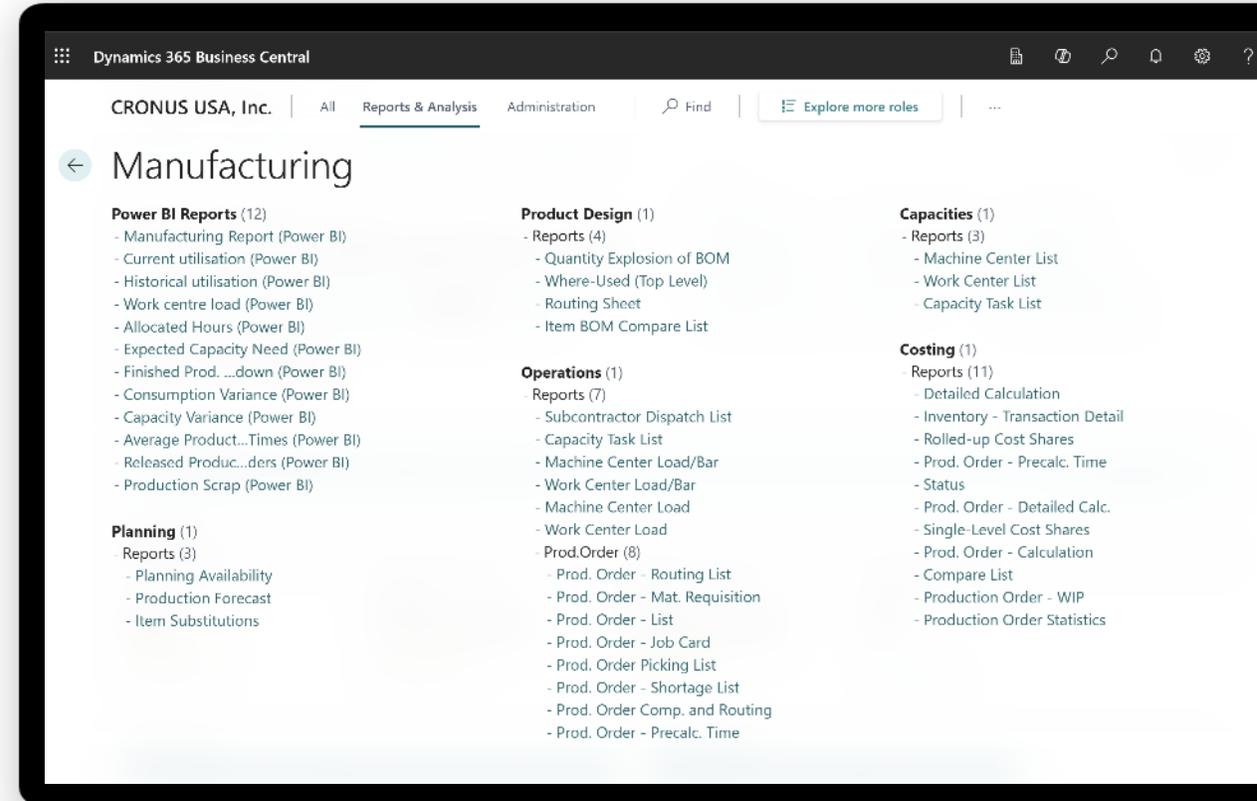


Business Central provides features to help you gather, analyze, and share your organization's manufacturing data:

- Power BI reports for manufacturing
- Ad-hoc analysis on lists
- Ad-hoc analysis of data in Excel
- Built-in manufacturing analytics tools
- Built-in manufacturing reports

Businesses capture lots of data during daily activities that supports business intelligence (BI) for manufacturing:

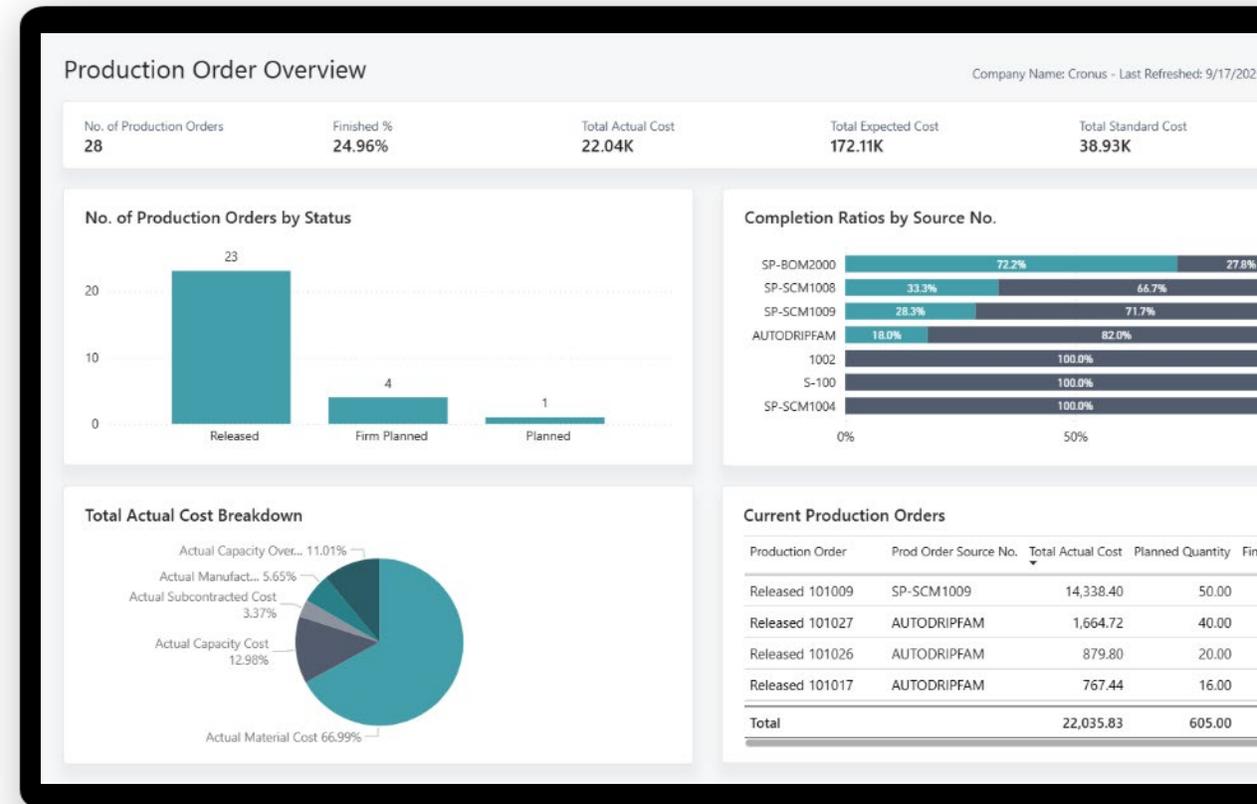
- Utilization
- Capacity
- Work center load
- Production time
- Production scrap



Power BI app for manufacturing

Power BI reports available for manufacturing:

- Production order overview
- Current utilization
- Historical utilization
- Work center load
- [Allocated hours](#)
- Expected capacity need
- [Finished production order breakdown](#)
- Consumption variance
- Capacity variance
- Average production times
- Released production order
- [Production scrap](#)
- Work center statistics
- Machine center statistics
- Machine center load
- Prod order – list
- [Prod order routing Gantt](#)
- Production order WIP



* All these reports are available in Business Central – a few were chosen for this presentation

BOM Cost Share Distribution

Friday, May 16, 2025

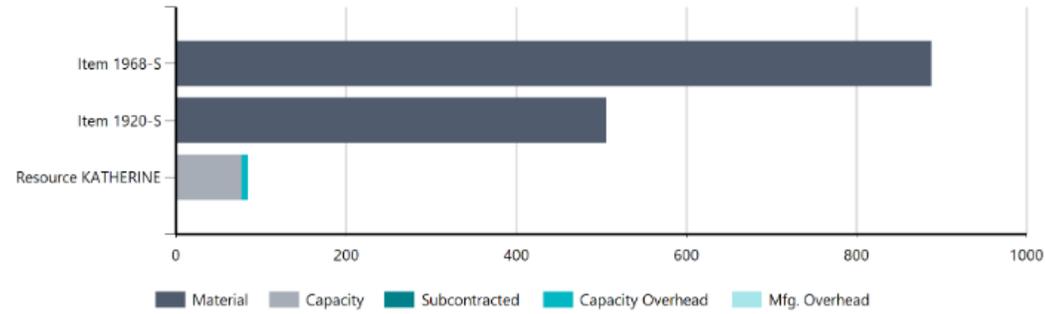
Page 1 / 10

ADMIN

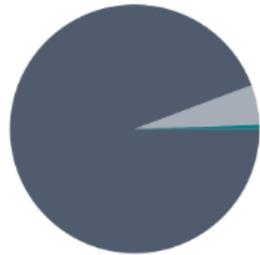
CRONUS USA, Inc.
 Item: Bin Filter: S-1-02
 Single-level cost shares only
 First BOM Level

No. 1925-W

Description: Conference Bundle 1-6

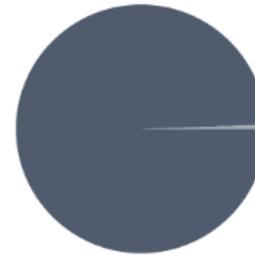


By Material/Labor



Material Labor Overhead

By Direct/Indirect



Direct Cost Indirect Cost

Type	No.	Description	Material	Non Inventory Material	Capacity	Subcontracted	Mfg. Overhead	Capacity Overhead	Total Cost
Total Cost	1925-W	Conference Bundle 1-6	1394.0		77			7.7	1478.7

Sustainability analytics

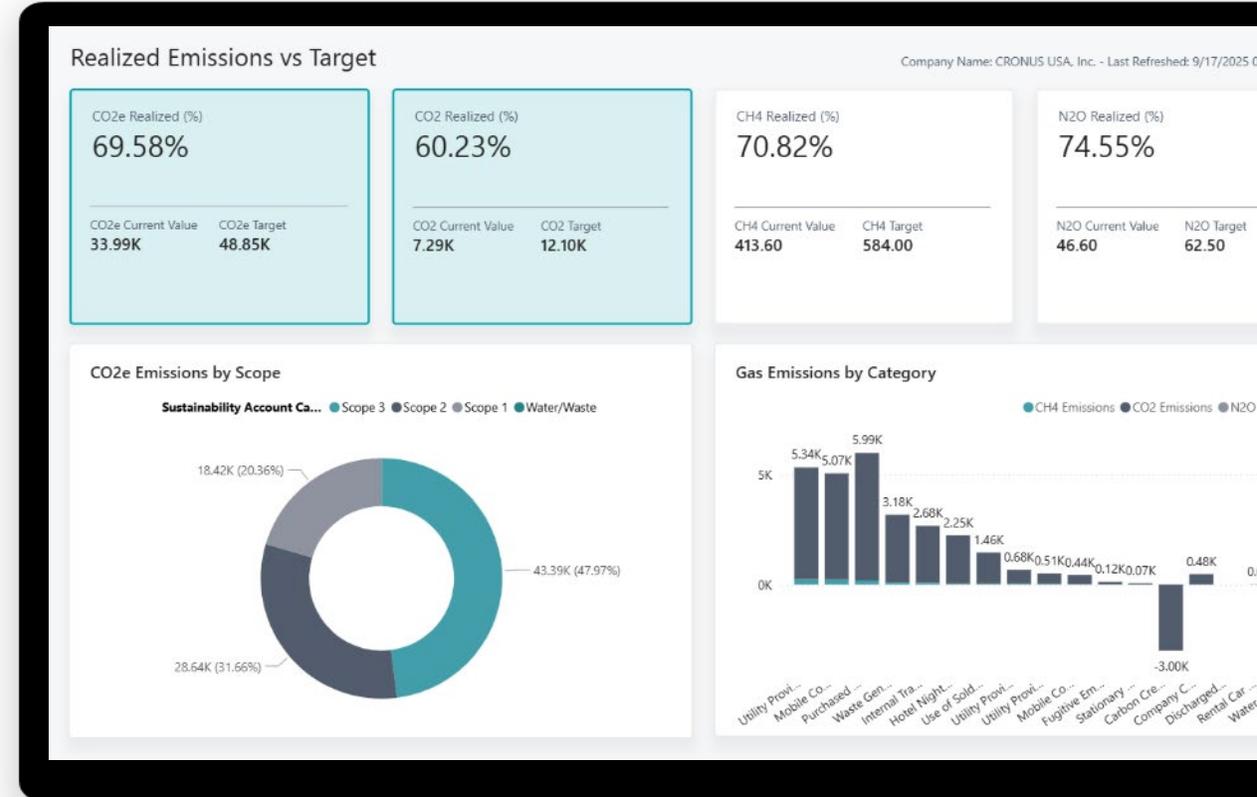


Business Central provides features to help you gather, analyze, and share your organization's sustainability data:

- Power BI app for sustainability
- Ad-hoc analysis on lists
- Ad-hoc analysis of data in Excel
- Built-in sustainability reports

Businesses capture lots of data during daily activities that supports business intelligence (BI) for sustainability:

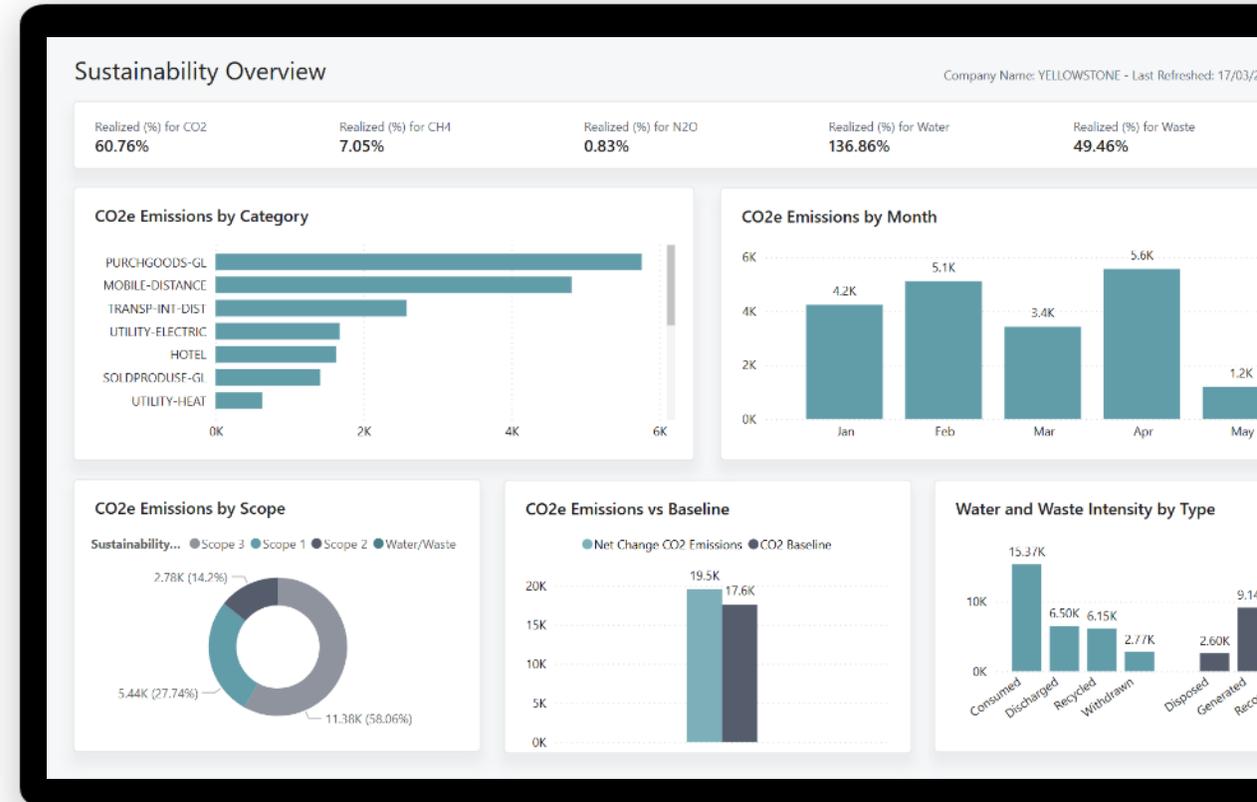
Emissions per facility
Average emissions
Emissions per scope
Water and waste



Power BI app for sustainability

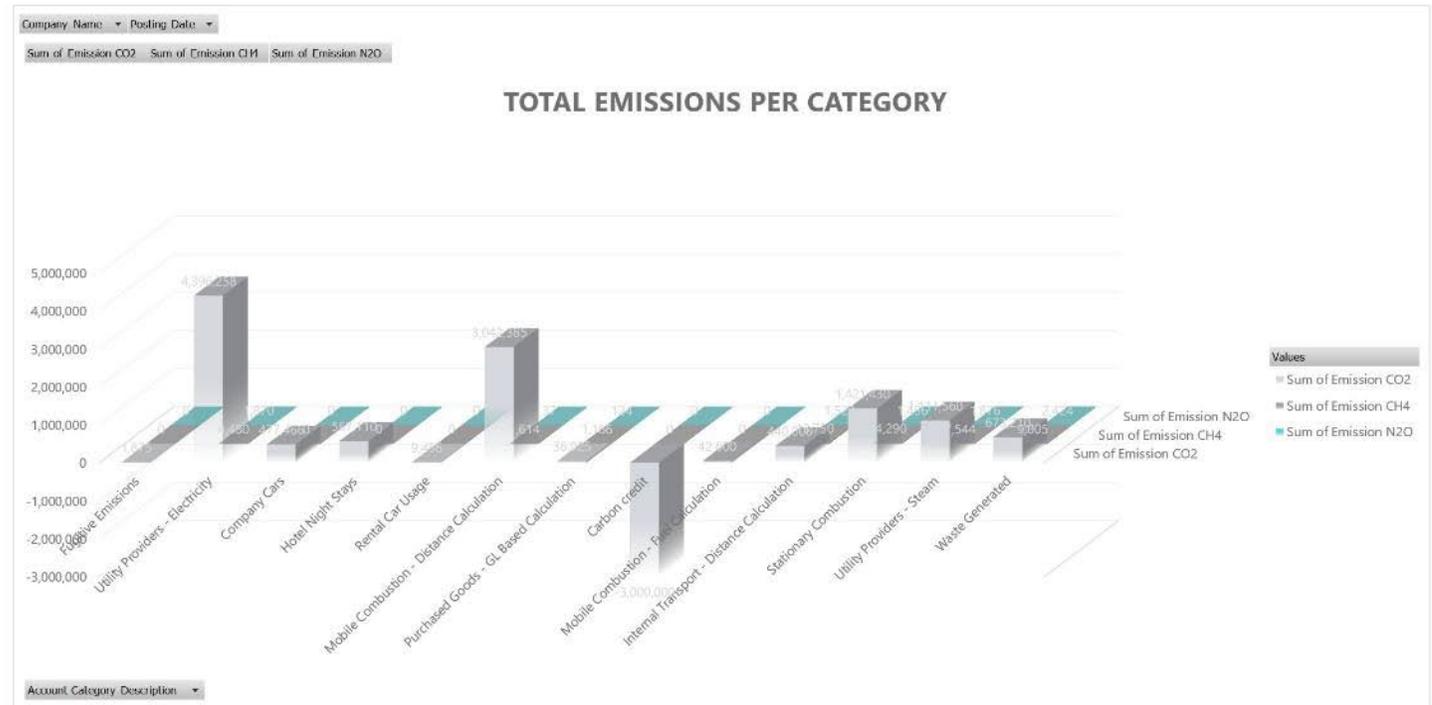
Power BI reports available for sustainability:

- Sustainability overview
- [Journey to net zero](#)
- Realized emissions vs target
- Realized emissions vs baseline
- [Water and waste analysis](#)
- [Emissions by category and scope](#)
- CO2e analysis
- CO2e key influencers
- CO2e decomposition tree
- [Social analysis](#)



* All these reports are available in Business Central – a few were chosen for this presentation

Row Labels	Sum of Emission CO2	Sum of Emission CH4	Sum of Emission N2O
Fugitive Emissions	1,875	0	0
Utility Providers - Electricity	4,396,258	4,480	1,870
Company Cars	477,466	0	0
Hotel Night Stays	567,110	0	0
Rental Car Usage	9,456	0	0
Mobile Combustion - Distance Calculation	3,042,385	1,614	37
Purchased Goods - GL Based Calculation	36,025	1,166	124
Carbon credit	-3,000,000	0	0
Mobile Combustion - Fuel Calculation	42,600	0	0
Internal Transport - Distance Calculation	440,000	13,750	1,523
Stationary Combustion	1,421,430	14,290	1,456
Utility Providers - Steam	1,111,560	7,544	1,876
Waste Generated	673,210	9,005	2,424
Grand Total	9,219,375	51,847	9,310



← Sustainability Ledger Entries



Emmission overview



Account Category / Account Name	Sum(Emission CH4)	Sum(Emission CO2)	Sum(Emission N2O)												
▼ UTILITY-ELECTRIC (5) <ul style="list-style-type: none"> > Purchased electricity - Conto... (5) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">2,172.738</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> <tr> <td>Sub Total UTILITY-ELECTRIC</td> <td style="text-align: right;">0.00</td> <td style="text-align: right;">2,172.738</td> <td style="text-align: right;">0.00</td> </tr> </table> 		0.00	2,172.738	0.00	Sub Total UTILITY-ELECTRIC	0.00	2,172.738	0.00							
	0.00	2,172.738	0.00												
Sub Total UTILITY-ELECTRIC	0.00	2,172.738	0.00												
▼ FUGITIVE (7) <ul style="list-style-type: none"> > Refrigerators (5) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">0.463</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> > Air-Condition Equipments 24... (2) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">1.411</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> Sub Total FUGITIVE <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">1.875</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> 		0.00	0.463	0.00		0.00	1.411	0.00		0.00	1.875	0.00			
	0.00	0.463	0.00												
	0.00	1.411	0.00												
	0.00	1.875	0.00												
▼ RENTALCAR (3) <ul style="list-style-type: none"> > Contoso Rental Car (3) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">9.456</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> Sub Total RENTALCAR <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">9.456</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> 		0.00	9.456	0.00		0.00	9.456	0.00							
	0.00	9.456	0.00												
	0.00	9.456	0.00												
▼ HOTEL (4) <ul style="list-style-type: none"> > Contoso Hotel - 3 stars (2) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">124.80</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> > Contoso Hotel - 4 stars Junio... (2) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">442.31</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> Sub Total HOTEL <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">567.11</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> 		0.00	124.80	0.00		0.00	442.31	0.00		0.00	567.11	0.00			
	0.00	124.80	0.00												
	0.00	442.31	0.00												
	0.00	567.11	0.00												
▼ COMPCAR (5) <ul style="list-style-type: none"> > Company Car - Premium size (1) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">40.002</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> > Company Car - Large size (4) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">437.464</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> Sub Total COMPCAR <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;"></td> <td style="width: 20%; text-align: right;">0.00</td> <td style="width: 20%; text-align: right;">477.466</td> <td style="width: 20%; text-align: right;">0.00</td> </tr> </table> 		0.00	40.002	0.00		0.00	437.464	0.00		0.00	477.466	0.00			
	0.00	40.002	0.00												
	0.00	437.464	0.00												
	0.00	477.466	0.00												
Total	0.00	3,228.645	0.00												

Pivot Mode

- Posting Date Month
- Document Type
- Document No.
- Account No.
- Account Name
- Emission Scope
- Account Category
- Account Subcategory
- Description
- Manual Input
- Unit of Measure
- Fuel/Electricity
- Distance
- Custom Amount
- Emission Factor CO2
- Emission Factor CH4

Row Groups

- Account Category
- Account Name

Values

- Sum(Emission CH4)
- Sum(Emission CO2)
- Sum(Emission N2O)

Columns Analysis Filters

Sust. Ledger Entries

Emissions by Scope

Posting Date Year /...	Sum(Emission CO2)	Sum(Emission CH4)	Sum(Emission N2O)	Sum(CO2e Emission)	Sum(Carbon Fee)
2024 (52)					
Q1 (16)					
Scope 3 (8)	1,336.602	9,0045	2,42376	1,336.97032	160.43644
Scope 2 (4)	2,389.677	7,54364	1,87632	2,389.98505	286.79821
Scope 1 (4)	1,421.69339	14,2896	1,4564	1,422.26987	170.67238
Sub Total Q1	5,147.97239	30,83774	5,75648	5,149,22524	617.90703
Q2 (36)					
Scope 3 (13)	866.665	14,91578	1,64642	867,26716	104,07206
Scope 1 (15)	86,59622	1,61376	0,03744	86,6609	10,39931
Scope 2 (8)	3,118,141	4,48	1,87	3,118,32648	374,19918
Sub Total Q2	4,071,40222	21,00954	3,55386	4,072,25454	488,67055
Sub Total 2024	9,219,37461	51,84728	9,31034	9,221,47979	1,106,57757
Total	9,219,37461	51,84728	9,31034	9,221,47979	1,106,57757

Pivot Mode

Search...

- Entry No.
- Template Name
- Batch Name
- Posting Date
- Posting Date Year
- Posting Date Quarter
- Posting Date Month
- Document Type
- Document No.
- Account No.
- Account Name
- Emission Scope
- Account Category
- Account Subcategory
- Description

Row Groups

- Posting Date Year
- Posting Date Q...
- Emission Scope

Values

- Sum(Emission CO...)
- Sum(Emission CH...)
- Sum(Emission N2...)
- Sum(CO2e Emissi...)

Column Labels

Drag here to set column labels

Create new analysis



Copilot in Business Central

Built on Microsoft's **comprehensive** approach



Security

+



Compliance

+



Privacy

+



Responsible AI

Copilot in Excel

Your personal Excel expert

Copilot reasons over structured data and completes tasks such as adding filters or splitting text

Executes formulas and provides steps and explanations along the way

Turns time-consuming tasks into seamless and efficient experiences in Excel

The screenshot displays the Microsoft Excel interface with a data table and the Copilot sidebar. The table contains the following data:

Date	Product ID	Product Name	Category	Street address	Sales Channel	Shipping State	Marketing Spend	Avg Customer Rating	Units sold	Unit Price	Total Revenue
6/30/2024	FC-3001	Fast Charger Basic	Fast Chargers		Distributor	Wisconsin	\$ 16,500	4.6	9	\$ 4,500	\$ 40,500
6/29/2024	CC-2002	Commercial Charger Advanced	Commercial Chargers		Distributor	New Jersey	\$ 23,500	4.0	26	\$ 1,600	\$ 41,900
6/29/2024	HC-1001	Home Charger Basic	Home Chargers		Retail	Louisiana	\$ 35,000	4.2	12	\$ 360	\$ 4,320
6/29/2024	HC-1003	Home Charger Premium	Home Chargers		Direct	Tennessee	\$ 28,000	4.7	33	\$ 480	\$ 15,840
6/29/2024	FC-3001	Fast Charger Basic	Fast Chargers	1234 La Crosse Ln	Direct	Tennessee	\$ 16,500	4.6	35	\$ 4,500	\$ 155,250
6/28/2024	CC-4002	Public Charger Advanced	Public Chargers	1234 La Crosse Ln	Distributor	Wisconsin	\$ 14,500	4.1	18	\$ 4,500	\$ 81,000
6/28/2024	CC-2002	Commercial Charger Advanced	Commercial Chargers		Distributor	Louisiana	\$ 23,500	4.0	194	\$ 1,600	\$ 309,600
6/27/2024	CC-4001	Public Charger Standard	Public Chargers	2345 Gator Bully, Ct	Distributor	Louisiana	\$ 23,000	3.7	1	\$ 1,800	\$ 1,800
6/27/2024	CC-4003	Public Charger Pro	Public Chargers	3456 Freesia Ct, Ge	Direct	South Carolina	\$ 25,000	2.8	48	\$ 9,000	\$ 432,000
6/27/2024	HC-1001	Home Charger Basic	Home Chargers		Distributor	Kentucky	\$ 35,000	4.2	4	\$ 360	\$ 1,440
6/27/2024	CC-2001	Commercial Charger Standard	Commercial Chargers		Direct	Oregon	\$ 10,400	3.5	194	\$ 1,200	\$ 232,200
6/26/2024	CC-2002	Commercial Charger Advanced	Commercial Chargers		Direct	Texas	\$ 23,500	4.0	198	\$ 1,600	\$ 316,800
6/25/2024	CC-4001	Public Charger Standard	Public Chargers	456 Cedar Lane, Ct	Distributor	North Carolina	\$ 23,000	3.7	27	\$ 1,800	\$ 48,600
6/25/2024	HC-1001	Home Charger Basic	Home Chargers		Retail	Maryland	\$ 35,000	4.2	14	\$ 360	\$ 5,040
6/25/2024	HC-1003	Home Charger Premium	Home Chargers		Retail	Colorado	\$ 28,000	4.7	11	\$ 480	\$ 5,280
6/23/2024	CC-2002	Commercial Charger Advanced	Commercial Chargers		Distributor	New York	\$ 23,500	4.0	15	\$ 1,600	\$ 24,000
6/22/2024	HC-1002	Home Charger Plus	Home Chargers		Direct	Illinois	\$ 22,500	3.1	72	\$ 400	\$ 28,800
6/21/2024	FC-3001	Fast Charger Basic	Fast Chargers		Distributor	Georgia	\$ 16,500	4.6	35	\$ 4,500	\$ 155,250
6/21/2024	FC-3003	Fast Charger Premium	Fast Chargers		Direct	North Carolina	\$ 27,800	4.8	9	\$ 8,000	\$ 72,000
6/19/2024	HC-1001	Home Charger Basic	Home Chargers		Direct	Arizona	\$ 35,000	4.2	25	\$ 360	\$ 9,000
6/19/2024	FC-3002	Fast Charger Plus	Fast Chargers		Direct	New Jersey	\$ 34,871	3.3	112	\$ 6,750	\$ 756,000
6/19/2024	CC-2003	Commercial Charger Pro	Commercial Chargers		Direct	Alabama	\$ 24,200	2.9	32	\$ 2,700	\$ 86,400
6/19/2024	CC-2001	Commercial Charger Standard	Commercial Chargers		Direct	Texas	\$ 10,400	3.5	17	\$ 1,200	\$ 20,400
6/19/2024	CC-2001	Commercial Charger Standard	Commercial Chargers		Distributor	Kentucky	\$ 10,400	3.5	203	\$ 1,200	\$ 243,000
6/17/2024	CC-2003	Commercial Charger Pro	Commercial Chargers		Distributor	California	\$ 24,200	2.9	162	\$ 2,700	\$ 437,400
6/16/2024	CC-4003	Public Charger Pro	Public Chargers	5678 Wrangler Via	Direct	Kentucky	\$ 25,200	2.8	23	\$ 9,000	\$ 207,000
6/16/2024	CC-4003	Public Charger Pro	Public Chargers	678 Dusty Trail, Tu	Direct	Arizona	\$ 25,200	2.8	1	\$ 9,000	\$ 9,000
6/16/2024	FC-3001	Fast Charger Basic	Fast Chargers		Direct	Washington	\$ 16,500	4.6	9	\$ 4,500	\$ 40,500
6/15/2024	HC-1002	Home Charger Plus	Home Chargers		Distributor	Massachusetts	\$ 22,500	3.1	24	\$ 400	\$ 9,600
6/15/2024	CC-2003	Commercial Charger Pro	Commercial Chargers		Distributor	Indiana	\$ 24,200	2.9	16	\$ 2,700	\$ 43,200
6/14/2024	CC-4003	Public Charger Pro	Public Chargers	789 Fleur-de-lis Fl	Distributor	Louisiana	\$ 25,200	2.8	21	\$ 9,000	\$ 189,000

The Copilot sidebar on the right includes the following sections:

- Create:** Suggest a formula column
- Understand:** Show data insights
- Advanced analysis:** Get deeper analysis results using Python
- Edit:** Highlight all cells with [incomplete in red]
- Ask Copilot:** How do I sum values based on [criteria]
- Chat history:** Give me another suggestion based on my prompt
- Using this workbook:** Ask a question, or tell me what you'd like to do with A1:L4533

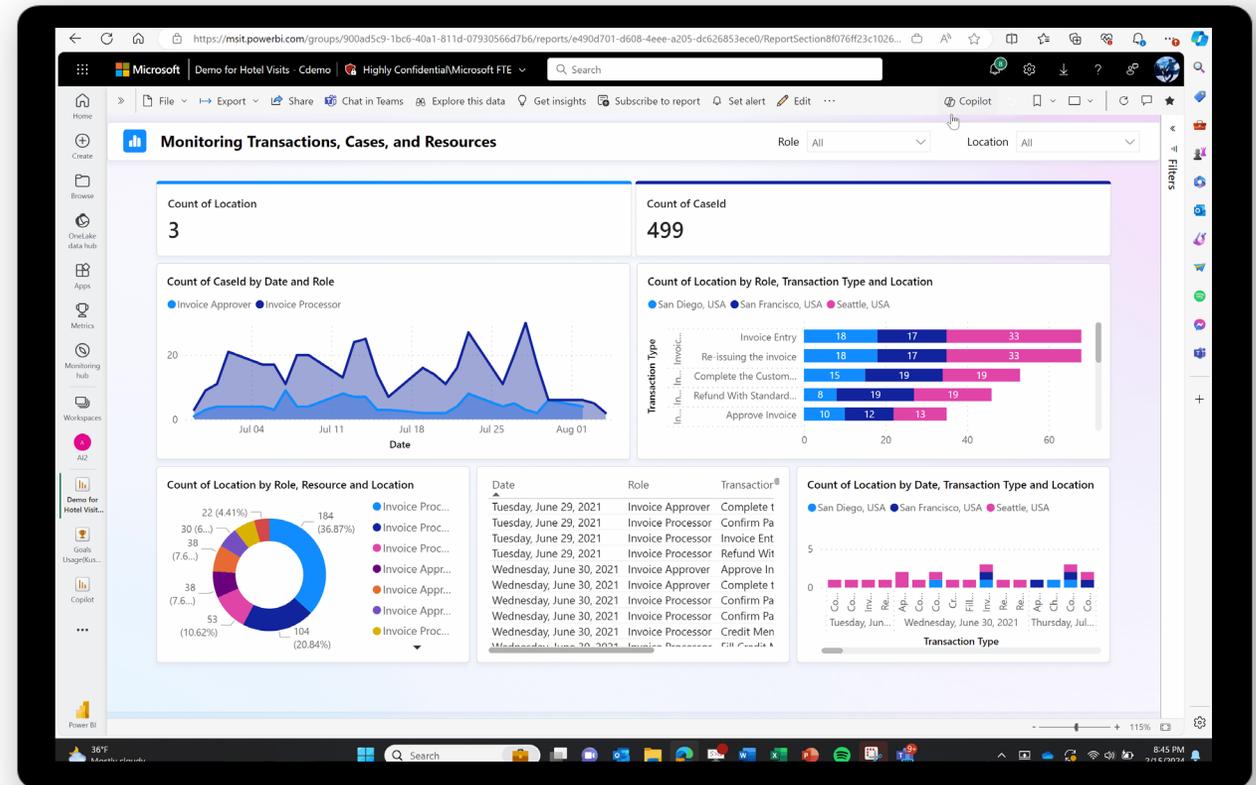
Copilot in Power BI

Empowering you to quickly find and share insights

Copilot for Power BI lets you quickly create report pages with just a few clicks

Evaluates the data and provides a report outline with suggested pages

With Copilot you can generate a summary of a report page by asking questions in natural language



AI-powered analysis with Copilot

Get to key insights faster

Copilot simplifies analysis by transforming raw data into insightful summaries using next generation AI

Provides an interactive and versatile way to calculate, summarize, and examine data

Creates, totals, pivots, and filters to help you find the information you're looking for

Dynamics 365 Business Central interface showing a table of Customer Ledger Entries for Contoso Coffee. The table includes columns for Posting Date, Document Date, Document Type, Document No., Customer No., Customer Name, Description, Original Amount, Department Code, and Customer Code. A Copilot overlay is visible, indicating it is preparing an analysis tab.

Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Original Amount	Department Code	Customer Code
3/31/2024	3/31/2024	Invoice	PS-INV103197	50000	Relecloud	Invoice S-INV102197	3,081.84	SALES	MEDIUM
3/23/2024	3/23/2024	Payment	PS-INV103192	50000	Relecloud	Invoice S-INV102192	-4,596.16	SALES	MEDIUM
3/23/2024	3/23/2024	Invoice	PS-INV103192	50000	Relecloud	Invoice S-INV102192	4,596.16	SALES	MEDIUM
3/19/2024	3/19/2024	Payment	PS-INV103188	50000	Relecloud	Invoice S-INV102188	-403.01	SALES	MEDIUM
3/19/2024	3/19/2024	Invoice	PS-INV103188	50000	Relecloud	Invoice S-INV102188	403.01	SALES	MEDIUM
2/28/2024	2/28/2024	Invoice	PS-INV103184	50000	Relecloud	Invoice S-INV102184	2,877.48	SALES	MEDIUM
2/21/2024	2/21/2024	Payment	PS-INV103179	50000	Relecloud	Invoice S-INV102179	-4,999.17	SALES	MEDIUM
2/21/2024	2/21/2024	Invoice	PS-INV103179	50000	Relecloud	Invoice S-INV102179	4,999.17	SALES	MEDIUM
1/31/2024	1/31/2024	Invoice	PS-INV103171	50000	Relecloud	Invoice S-INV102171	2,877.48	SALES	MEDIUM
1/24/2024	1/24/2024	Payment	PS-INV103166	50000	Relecloud	Invoice S-INV102166	-2,757.70	SALES	MEDIUM
1/24/2024	1/24/2024	Invoice	PS-INV103166	50000	Relecloud	Invoice S-INV102166	2,757.70	SALES	MEDIUM
1/20/2024	1/20/2024	Payment	PS-INV103162	50000	Relecloud	Invoice S-INV102162	-403.01	SALES	MEDIUM
1/20/2024	1/20/2024	Invoice	PS-INV103162	50000	Relecloud	Invoice S-INV102162	403.01	SALES	MEDIUM

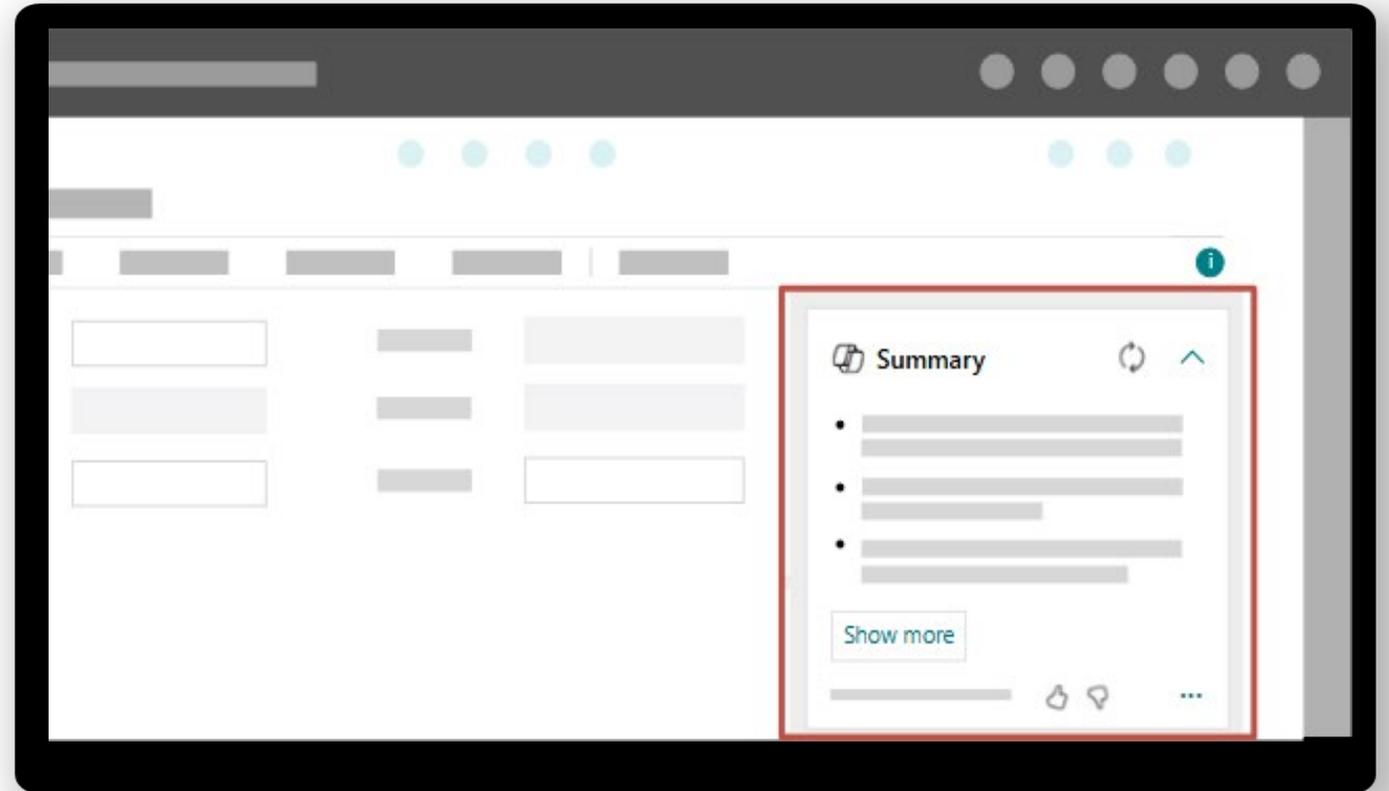
Summarize records with Copilot

Get to key insights faster

Use Copilot to get a quick summary of a record, such as a customer, item, or sales order, directly alongside your data.

Copilot generates two or three concise bullet points that provide details and insights about the data tailored to your role in Business Central

The summary helps you understand the data and identify areas that need attention



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Thank you

