

The logo for FORVIS, featuring the word "FORVIS" in a bold, red, sans-serif font. A small "TM" trademark symbol is positioned to the upper right of the letter "S".

FORVISTM

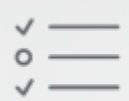
The text "Business Technology Solutions" in a white, sans-serif font, set against a background of overlapping red diagonal stripes.

Business Technology Solutions

Power BI & Business Central: A Winning Combination

June 13, 2023

To Receive CPE Credit



You must respond to at least 3 of the 4 polling questions per CPE hour



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Housekeeping Items



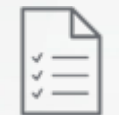
Please use the Questions feature to ask questions



All attendees will remain muted



**You will receive a copy of the slides & recording.
Watch for an email with the link**



**Please take a few moments to complete our survey
at the end of the webinar**

About FORVIS

Services

- Assurance
- Tax
- Advisory

FORVIS, LLP ranks among the nation's top 10 public accounting firms, helping unlock the potential of our clients, people, and communities. We deliver an **Unmatched Client Experience™** with assurance, tax, and advisory services that reflect our exceptional capabilities and uncommon commitment to excellence. Discover how our forward vision can help you prepare for what's next.



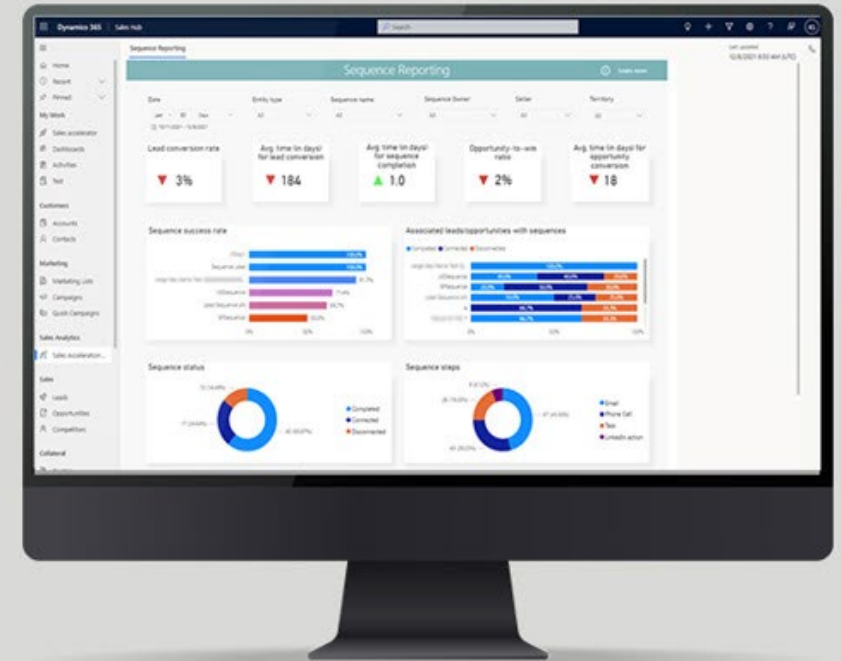
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Business Technology Solutions

FORVIS' Business Technology Solutions can help support digital transformation across your organization with enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

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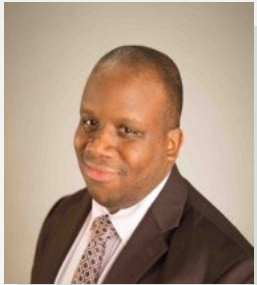
From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

Meet the Presenters



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Objectives

- Recognize how to use Power BI Desktop to connect to the data
- Demonstrate how to create a data model
- Describe how to create visualizations
- Explain how to view reports in Business Central

Agenda

9:00 a.m. ● Business Central Data Sources

9:15 a.m. ● Creating Power BI Reports

9:35 a.m. ● Putting Power BI in Business Central







Business Central Data Sources

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Data Sources

- └─  CRONUS US [3]
 -  Advanced APIs
 -  Standard APIs v2.0 [73]
 -  Web Services (legacy)

- Advanced APIs
- Standard APIs v2.0
- Web Services

APIs

- Pre-built
- Enable developers to access & manipulate data from external apps, like Power BI
- REST-based
- Custom APIs can be created

APIs

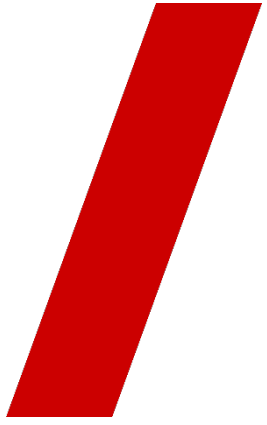
- Available starting June 2021
- Read-only database replica
- Performance boost up to 20%

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Web Services

- Collection of pages & queries
- Uses ODataV4
- Web services can be created

Object Type ↑	Object ID	Object Name	Service Name ↑
Page	122	G/L Entries Preview	G/L Entries Preview
Page	17	G/L Account Card	G_L_Account_Card_Excel
Page	790	G/L Account Categories	G_L_Account_Categories
Page	313	General Product Posting Groups	Gen. Product Posting Groups
Page	39	General Journals	General Journal
Page	251	General Journal Batches	General Journal Batches
Page	39	General Journals	General Journals
Page	39	General Journals	General Journals_Excel
→ Page	:	20 General Ledger Entries	General Ledger Entries



Show Me!





Creating Power BI Reports

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Basic Steps

Sign up for the PBI Service



Download PBI Desktop



Make sure the data is available



Get the BC data source info



Get the BC report theme (optional)

Creating a Report

Open PBI Desktop



Get Data



Edit Queries, if necessary

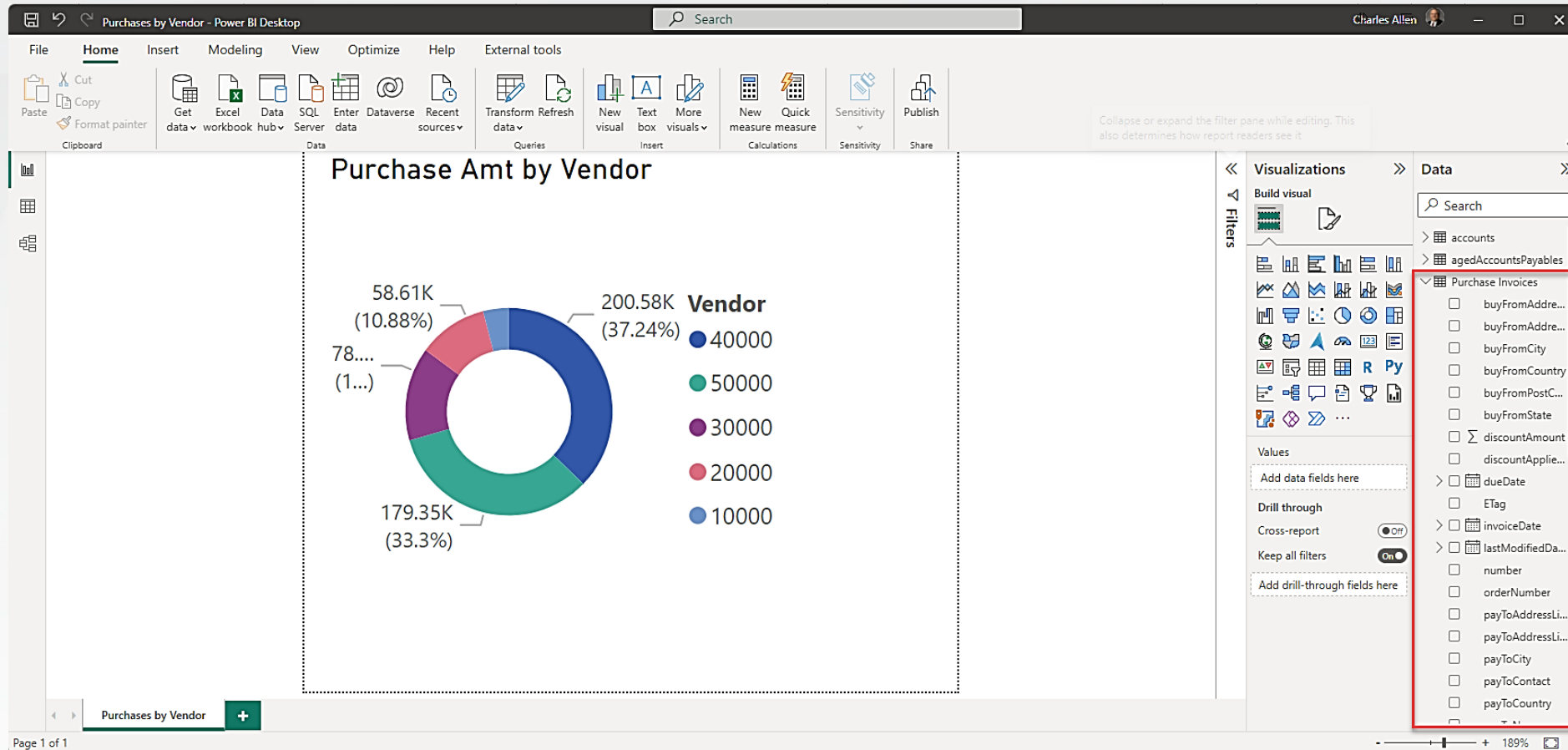


Create visualizations



Apply filters

Report Creation





Show Me!





Putting Power BI in Business Central

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Putting the Report in Power BI

- Publish the report to a workspace
- Log in to Business Central
- Click the drop-down to select a new report

Power BI Report ▾

- Select Report
- Expand Report
- Previous Report
- Next Report
- Manage Report
- Refresh Page
- Upload Report
- Reset All Reports

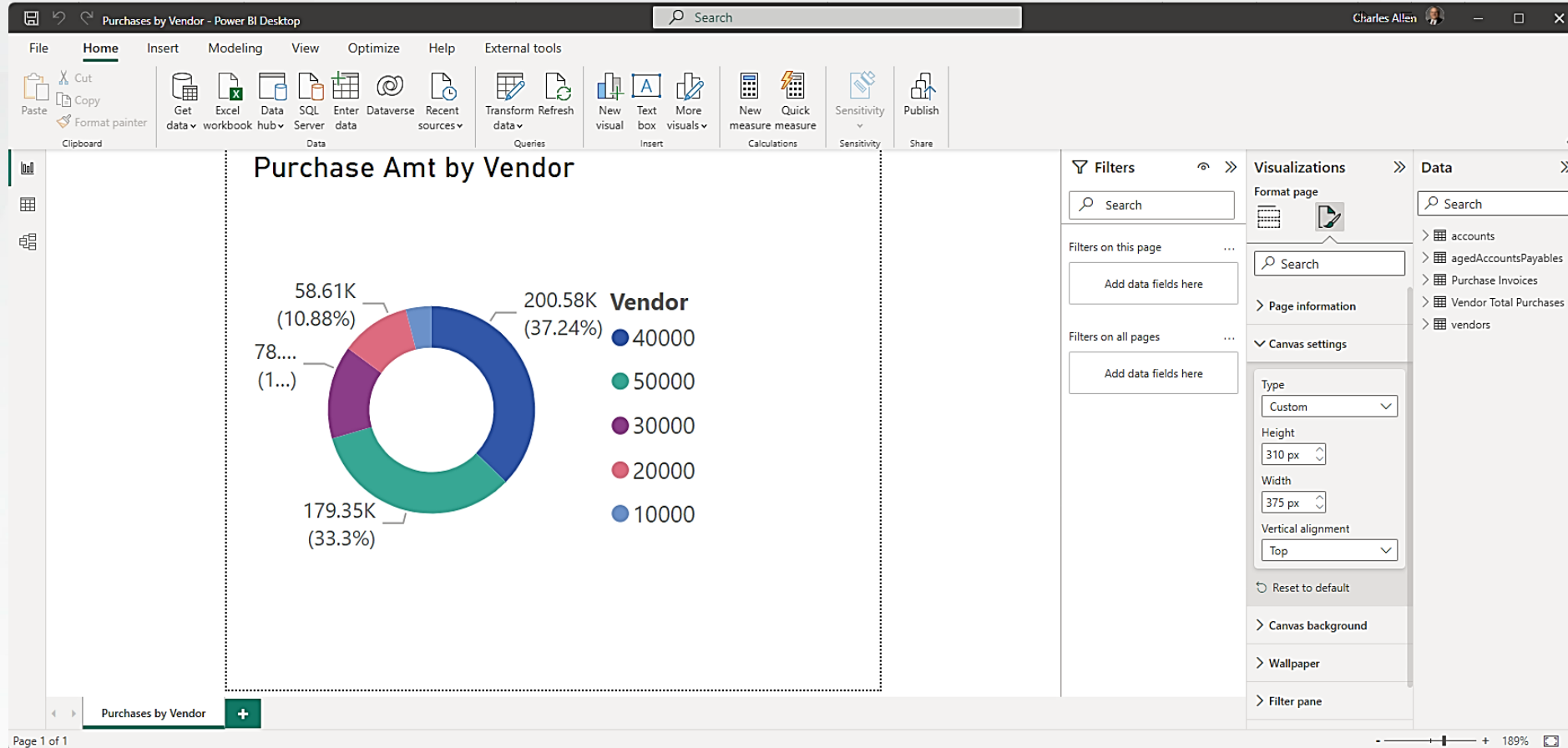
Total Purchases	Balance Due	Current	Period 1	Period 2	Period 3
21,632.20	2,071.13	0.00	0.00	0.00	2,071.13
58,609.80	4,903.88	0.00	0.00	0.00	4,903.88
78,445.70	6,979.57	0.00	0.00	0.00	6,979.57
200,584.30	18,193.10	0.00	0.00	0.00	18,193.10
179,352.50	17,273.87	0.00	0.00	0.00	17,273.87
538,624.50	49,421.55	0.00	0.00	0.00	49,421.55

Formatting for Business Central

- Size
- Color
- One page

[Display Custom Power BI Reports - Business Central](https://learn.microsoft.com/en-us/dynamics365/business-central/across-how-use-powerbi-reports-factbox)
<https://learn.microsoft.com/en-us/dynamics365/business-central/across-how-use-powerbi-reports-factbox>

Formatting for Business Central



Viewing the Report in Business Central

CRONUS USA, Inc. | Finance | Cash Management | Sales | Purchasing | Shopify |

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

Intercompany

Incoming Transactions

New Intercom... Transactions

0

Rejected ...ner Companies

0

Outgoing Transactions

Intercompany ... to Send

0

Shopify Activities

Shopify Shop info

Unmapped Customers

0

Unmapped Products

0

Unprocessed Orders

0

Unprocessed Shipments

0

Synchronization Errors

0

Insights

Business Performance

Top Five Customers by Sales Value

Customer	Sales Value
Trey Research	20000
Alpine Ski House	40000
Relecloud	50000
School of Fine Art	30000
Adatum Corporation	10000

Power BI Report

PURCHASE AMT BY VENDOR

Vendor	Purchase Amount	Percentage
40000	21.63K	4.02%
50000	58.61K	10.88%
30000	78.45K	14.56%
20000	179.35K	33.3%
10000	200.58K	37.24%

Report Inbox

Description	Created Date-Time	Output Type
(There is nothing to show in this view)		





Show Me!



Resources

- [Introduction to Business Central and Power BI - Business Central | Microsoft Learn](#)
- [Use secondary read-only database for Power BI reporting - Dynamics 365 Release Plan | Microsoft Learn](#)
- [Display Custom Power BI Reports - Business Central | Microsoft Learn](#)
- [Crossroads Hospice Leverages Business Central & Solver for Greater Impact | FORVIS](#)

What's Next



Using Power BI With Dynamics GP

July 18, 2023 • 10–11 a.m. ET

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Q&A



Use the Q&A tool to submit any questions you may have

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