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Account Schedule With Power BI in Dynamics 365 Business Central

August 31st, 2021



By [Justin Song](#), Senior BI Analyst

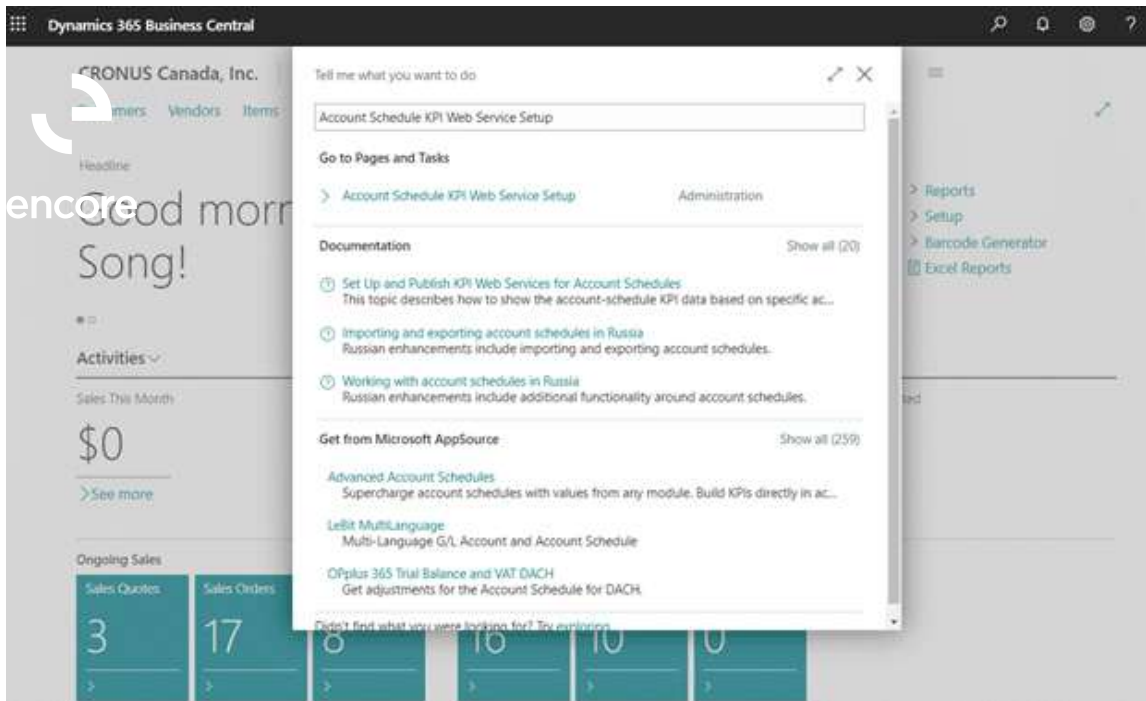
Did you know that [Microsoft Power BI](#) can connect account schedule data in [Microsoft Dynamics 365 Business Central](#)? Follow the simple steps shown below to try this out yourself:

- Click search icon
- Type Account Schedule KPI Web Service Setup
- Click Account Schedule KPI Web Service Setup

Production BOMs in
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September 23

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Suggested Articles:

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Impactful Copilot Features in Dynamics 365 Business Central

- Enter information on General header tab
- **Web Service Name** will appear in the **Service Name** field on the **Web Services** page
- More info about fields on General header tab
- Add account schedules on Account Schedules line that you would like to see data from Power BI
- Click Publish Web Service


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Account Schedule KPI Web Service Setup ✓ Saved   

Reminder: your work date is 1/28/2022 [Use today](#) | [Change to...](#) | [Turn off reminder](#)

[Edit List](#) [+ Publish Web Service](#) [X Remove Web Service](#) [Refresh Data...](#) Page | More options 

General

Period Published ☒

View By Data Last Updated 8/23/2021 2:48 PM

G/L Budget Name Data Time To Live (hours) 24

Forecasted Values Start Last Locked Posting Date 1/28/2022

Web Service Name powerbifinance Last Changed Budget D... 6/16/2021

Account Schedules | Manage

Acc. Schedule Name ↑	Acc. Schedule Description
→ BALANCE SH	Balance Sheet
CASH FLOW	Cash Flow Statement
I_CACycle	Data for Cash Cycle Chart
I_INCEXP	Data for Income & Expense Chart
I_MINTRIAL	Data for Reduced Trial Balance Info Part
M-BALANCE	Balance Sheet
M-CASHFLOW	Cash Flow Statement
MDP INCOME	Income Statement
M-INCOME	Income Statement
M-RETAIND	Retained Earnings

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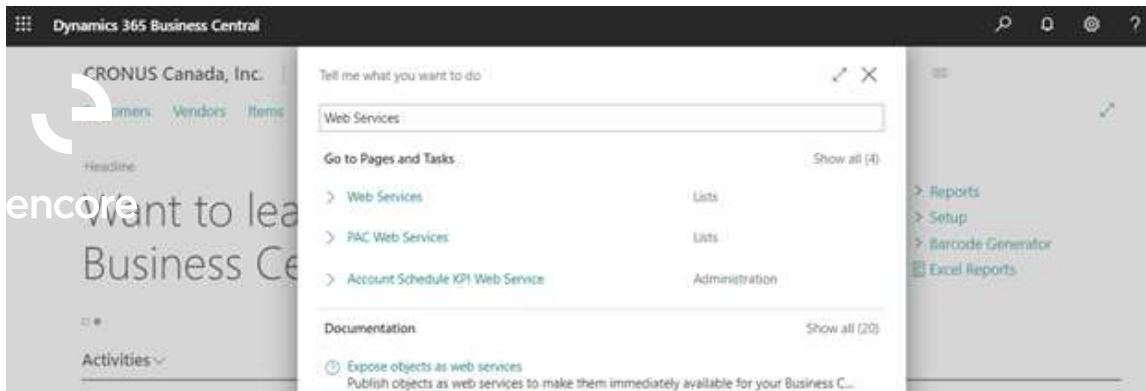
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- Click search icon
- Type Web Services
- Click Web Services

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Make sure Web Service Name that you entered on General header tab appears on Web Services page. 'Powerbifinance' is Service Name in this example.

Object Type	Object ID	Object Name	Service Name	All Ten...	Published
Page	6312	PBI Job Act. v. Budg. Cost	Power BI Job Act. v. Budg. Cost	<input type="checkbox"/>	<input type="checkbox"/>
Page	6310	PBI Job Act. v. Budg. Price	Power BI Job Act. v. Budg. Price	<input type="checkbox"/>	<input type="checkbox"/>
Page	6311	PBI Job Profitability	Power BI Job Profitability	<input type="checkbox"/>	<input type="checkbox"/>
Page	6318	PBI Report Labels	Power BI Report Labels	<input type="checkbox"/>	<input type="checkbox"/>
Page	6314	PBI Sales Pipeline	Power BI Sales Pipeline	<input type="checkbox"/>	<input type="checkbox"/>
Page	6315	PBI Top 5 Opportunities	Power BI Top 5 Opportunities	<input type="checkbox"/>	<input type="checkbox"/>
Page	6313	PBI WorkDate Calc.	Power BI WorkDate Calc.	<input type="checkbox"/>	<input type="checkbox"/>
Page	197	Account Schedule KPI Web Service	powerbifinance	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Page	99000815	Production Order List	ProductionOrderList	<input type="checkbox"/>	<input type="checkbox"/>

- Open Power BI Desktop
- Click Get Data > More

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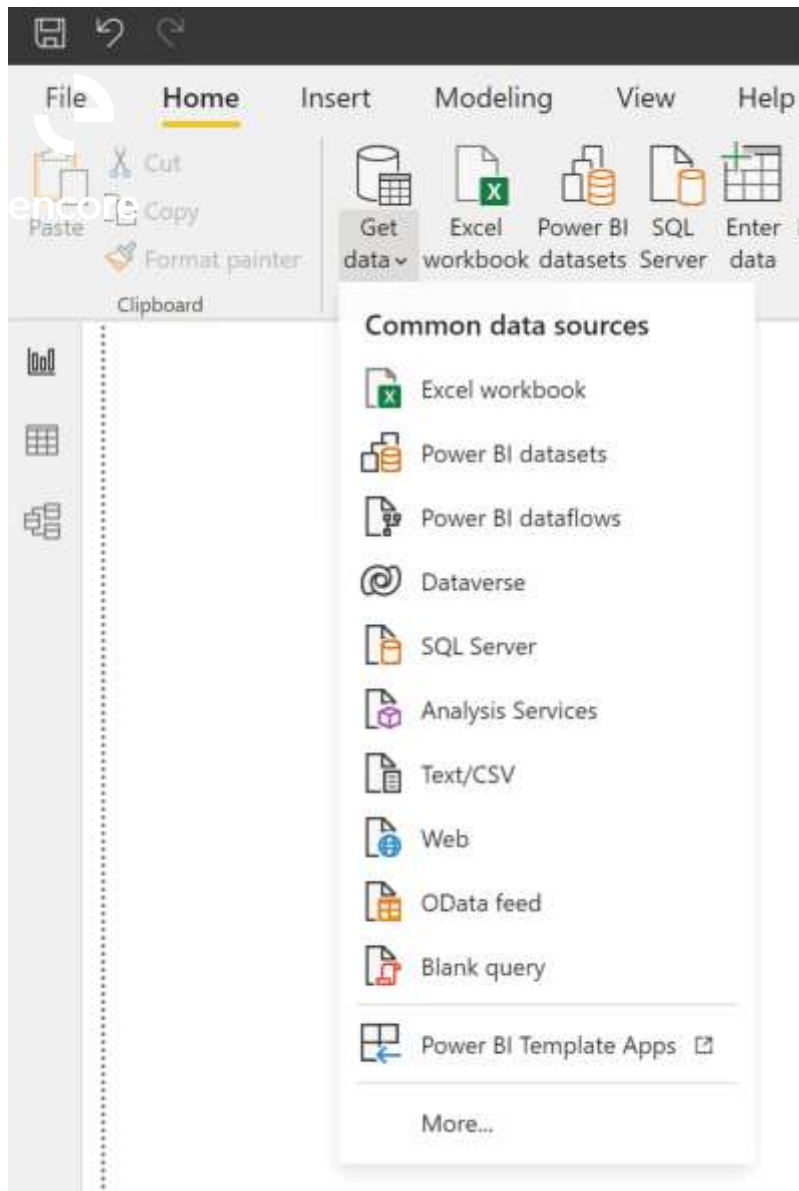
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Online Services > Dynamics 365 Business Central > Connect

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Get Data

All
File
Database
Power Platform
Azure
Online Services
Other

Online Services

- SharePoint Online List
- Microsoft Exchange Online
- Dynamics 365 (online)
- Dynamics NAV
- Dynamics 365 Business Central
- Dynamics 365 Business Central (on-premises)
- Azure DevOps (Boards only)
- Azure DevOps Server (Boards only)
- Salesforce Objects
- Salesforce Reports
- Google Analytics
- Adobe Analytics
- appFigures (Beta)
- Data.World - Get Dataset (Beta)
- GitHub (Beta)
- LinkedIn Sales Navigator (Beta)

Certified Connectors | Template Apps

Connect Cancel

Register

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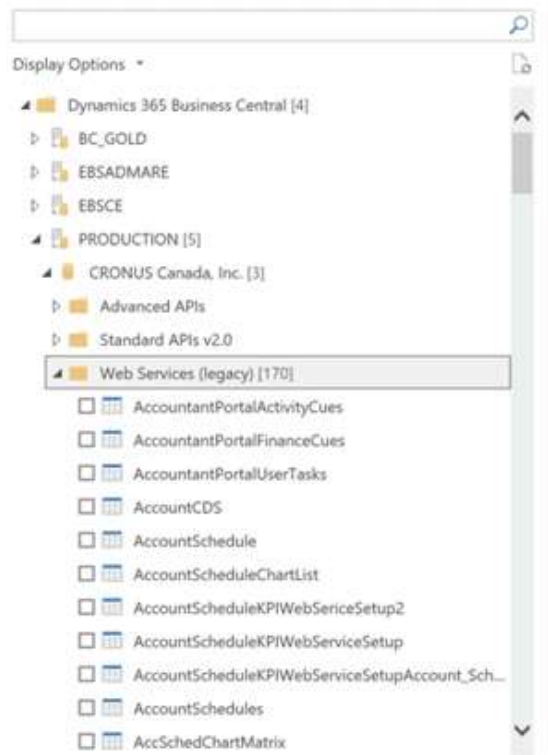
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- Enter your credentials to sign in
- Expand name of environment > Company > Web Services (legacy)

- If you don't know your name of environment, click the help button (?) top right corner > Help & Support
- You will find the name of your environment under the Troubleshooting section

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Navigator



No items selected for preview

Load

Transform Data

Cancel

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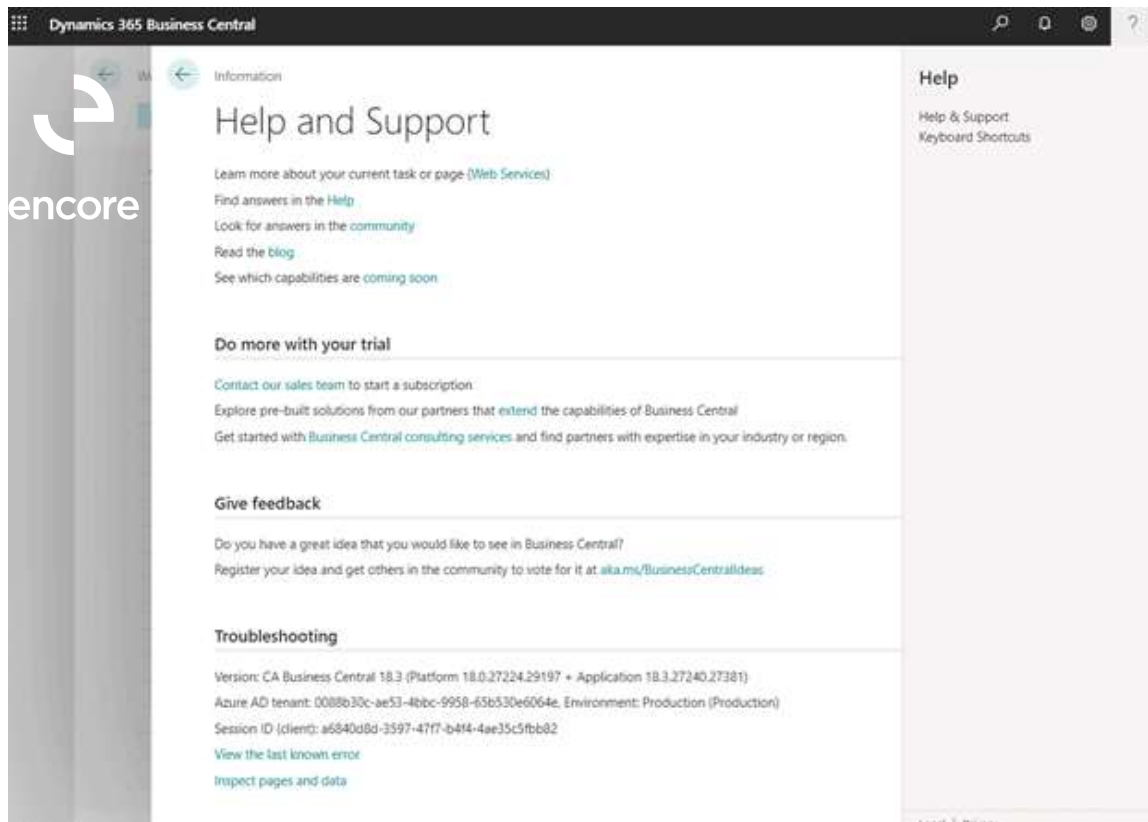
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- Find and select the Web Service Name, 'powerbifinance' in this example
- Click Transform Data
- Do some data transformations if needed
- Click Close & Apply

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Navigator

powerbifinance

Navigation Options *

- ☐ Power_BI_Sales_Hdr_List
- ☐ Power_BI_Sales_List
- ☐ Power_BI_Sales_Pipeline
- ☐ Power_BI_Top_5_Opportunities
- ☐ Power_BI_Top_Cust_Overview
- ☐ Power_BI_Vend_Item_Ledg_Ent
- ☐ Power_BI_Vendor_Ledger_Entries
- ☐ Power_BI_Vendor_List
- ☐ Power_BI_WorkDate_Calc
- ☒ powerbifinance
- ☐ ProductionOrderList
- ☐ ProductItemAvailability
- ☐ purchaseDocumentLines
- ☐ purchaseDocuments
- ☐ purchaseDocumentsworkflowPurchaseDocumentLI...
- ☐ PurchaseOrder
- ☐ PurchaseOrderArchives
- ☐ PurchaseOrderPurchLines
- ☐ Res_LedgerEntries
- ☐ SalesDashboard

No	Date	Closed_Period	Account_Schedule_Name
1	2019-01-01	FALSE	BALANCE SH
2	2019-01-01	FALSE	BALANCE SH
3	2019-01-01	FALSE	BALANCE SH
4	2019-01-01	FALSE	BALANCE SH
5	2019-01-01	FALSE	BALANCE SH
6	2019-01-01	FALSE	BALANCE SH
7	2019-01-01	FALSE	BALANCE SH
8	2019-01-01	FALSE	BALANCE SH
9	2019-01-01	FALSE	BALANCE SH
10	2019-01-01	FALSE	BALANCE SH
11	2019-01-01	FALSE	BALANCE SH
12	2019-01-01	FALSE	BALANCE SH
13	2019-01-01	FALSE	BALANCE SH
14	2019-01-01	FALSE	BALANCE SH
15	2019-01-01	FALSE	BALANCE SH
16	2019-01-01	FALSE	BALANCE SH
17	2019-01-01	FALSE	BALANCE SH
18	2019-01-01	FALSE	BALANCE SH
19	2019-01-01	FALSE	I_CACycle
20	2019-01-01	FALSE	I_CACycle
21	2019-01-01	FALSE	I_CACycle
22	2019-01-01	FALSE	I_CACycle
23	2019-01-01	FALSE	I_CACycle

Load Transform Data Cancel

Register

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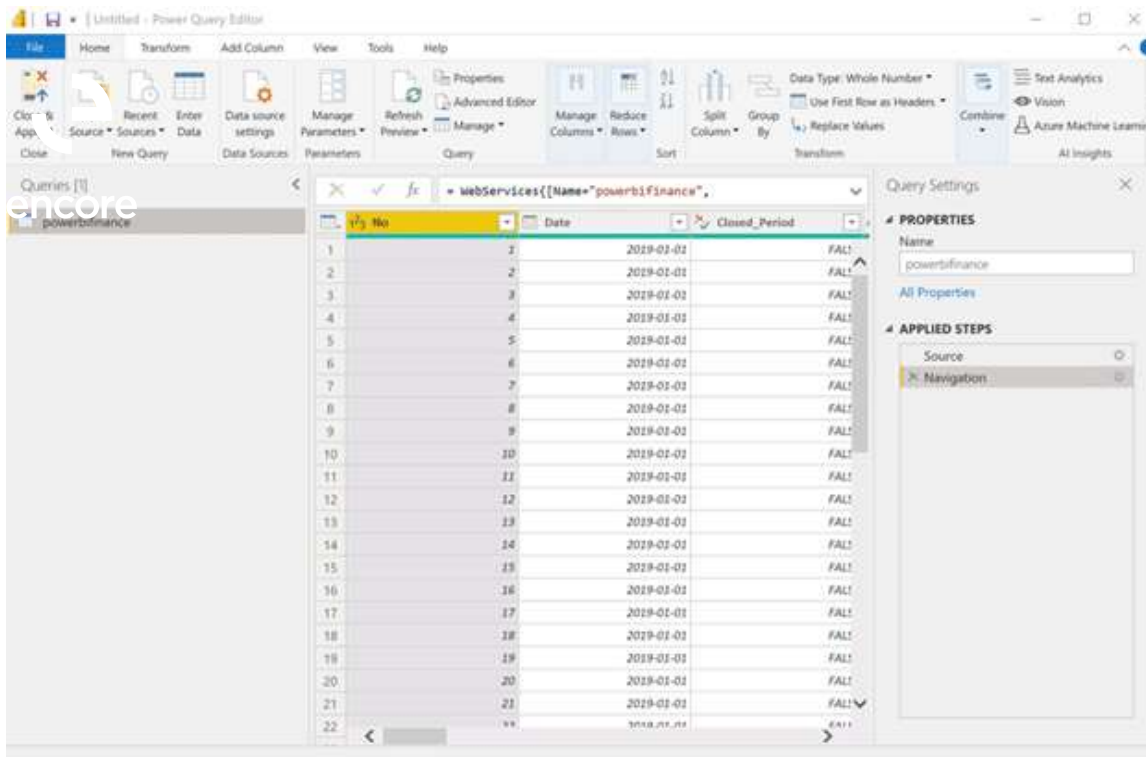
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No	Date	Closed_Period
1	2019-01-01	FALSE
2	2019-01-01	FALSE
3	2019-01-02	FALSE
4	2019-01-01	FALSE
5	2019-01-01	FALSE
6	2019-01-01	FALSE
7	2019-01-01	FALSE
8	2019-01-01	FALSE
9	2019-01-01	FALSE
10	2019-01-01	FALSE
11	2019-01-01	FALSE
12	2019-01-01	FALSE
13	2019-01-01	FALSE
14	2019-01-01	FALSE
15	2019-01-01	FALSE
16	2019-01-01	FALSE
17	2019-01-01	FALSE
18	2019-01-01	FALSE
19	2019-01-01	FALSE
20	2019-01-01	FALSE
21	2019-01-01	FALSE
22	2019-01-01	FALSE

Add fields (No, KPI_Name, Net_Change_ for income statement related account schedules) with a table visual.

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KPI_Name	Net_Change_Actual	Net_Change_Budget	Net_Change_Actual_Last_Year	Net_Change_Budget_Last_Year
431	\$85,919.44	\$0	\$0	\$0
436	\$82,111.34	\$0	\$0	\$0
5407	\$88,239.17	\$0	\$0	\$0
755	\$76,141.51	\$0	\$0	\$0
863	\$81,349.19	\$0	\$0	\$0
871	\$78,205.54	\$0	\$0	\$0
1079	\$79,183.68	\$0	\$0	\$0
1187	\$76,263.45	\$0	\$0	\$0
1295	\$75,616.34	\$0	\$0	\$0
1403	\$111,018.02	\$0	\$76,309	\$0
1511	\$66,753.88	\$0	\$68,791	\$0
1619	\$68,819.13	\$0	\$87,813	\$0
1727	\$77,188.07	\$0	\$88,810	\$0
1835	\$69,723.14	\$0	\$82,711	\$0
1943	\$68,723.14	\$0	\$88,239	\$0
2051	\$69,723.14	\$0	\$76,141	\$0
2159	\$68,723.14	\$0	\$81,349	\$0
2267	\$68,723.14	\$0	\$78,205	\$0
2375	\$68,723.14	\$0	\$76,184	\$0
2483	\$69,723.14	\$0	\$76,294	\$0
2591	\$68,723.14	\$0	\$75,976	\$0
2699	\$69,723.14	\$110,865	\$111,018	\$0
2807	\$68,723.14	\$2,196,700	\$66,754	\$0
Total	(\$16,163,149,490.18)	\$2,227,818,740	(\$2,928,851,814)	\$1,878,529,900

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- Add slicers for Date and Account_Schedule_Name
- Set Date and Account_Schedule_Name slicers
- Set the table visual properties below
 - Sort by No
 - Sort ascending
 - Totals Off

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Account	Net Change Actual	Net Change Budget	Net Change Actual Last Year	Net Change Budget Last Year
30100 Sales Discounts	\$0.00	\$0	\$0	\$0
30120 Job Sales Credits	\$0.00	\$0	\$0	\$0
30130 Total Income	\$205,927.03	\$186,102.80	\$238,346	\$0
30144 Cost of Goods Sold	\$392,045,457.79	\$215,829,600	\$175,704	\$0
30150 Materials	(\$392,045,457.79)	\$81,611,500	\$0	\$0
30160 Job Cost	\$0.00	\$0	\$0	\$0
30180 Total Cost of Goods Sold	\$25,310.52	\$101,138,100	\$175,704	\$0
30190 Gross Profit	\$180,616.51	\$84,964,700	\$162,642	\$0
30200 Expense	\$0.00	\$77,600	\$0	\$0
30210 Rent Expense	\$0.00	\$0	\$3,000	\$0
30220 Advertising Expense	\$0.00	\$1,389,000	\$0	\$0
30240 Unemployment Expense	\$0.01	\$3,000,000	\$0	\$0
30250 Fees Expense	\$0.00	\$12,200	\$0	\$0
30260 Payroll Expense	\$0.00	\$15,700,000	\$0	\$0
30270 Salaries Expense	\$0.00	\$4,580,200	\$3,000	\$0
30280 Repairs and Maintenance Expense	\$0.00	\$7,208,000	\$0	\$0
30300 Utilities Expense	\$0.00	\$1,891,000	\$0	\$0
30310 Other Income & Expenses	\$0.00	\$16,272,800	\$0	\$0
30320 Gas Expense	\$0.00	\$1,900,000	\$0	\$0
30330 Travel Expense	\$0.00	\$73,500	\$0	\$0
30340 Vehicle Expense	\$0.00	\$175,000	\$0	\$0
30360 Bad Debt Expense	\$0.00	\$103,600	\$0	\$0
30370 Total Expense	\$2.01	\$74,749,800	\$6,000	\$0
30380 Net Income	\$180,616.50	\$1,819,900	\$166,642	\$0

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If you don't see all your chart of accounts for the account schedule, check your account schedule.

Show column must be set to 'Yes'. After you set Show to Yes for the account schedule, click the Refresh button to retrieve data from Business Central.

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Account Schedule

Reminder: your work date is 1/28/2022 Use today | Change to... | Turn off reminder

Name: MDP INCOME

File Edit View Process Insert Open in Excel More options

Row No.	Description	Totaling Type	Totaling	Row Type	Amount Type	Show Opp. Sign	Show	Bold	Italic
P0001	Income	Posting Acc...	40000 42000 42500.43000 43400...	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P0002	Income, Services	Posting Acc...	42100.42300 43100.43300 4500...	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0003	Income, Product Sales	Posting Acc...	44100.44300	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0004	Income, Jobs	Posting Acc...	40230	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0005	Sales Discounts	Posting Acc...	45200	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0006	Sales Returns & Allowances	Posting Acc...		Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0007	Income, Interest	Posting Acc...		Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0008	Job Sales Contra	Posting Acc...	40450	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
F0009	Total Income	Formula	P0001..P0008	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P0010		Posting Acc...		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0011	Cost of Goods Sold	Posting Acc...	54000.59950	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P0012	Labour	Posting Acc...		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0013	Materials	Posting Acc...	50000 51000.53900	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0014	Discounts Granted	Posting Acc...		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
P0015	Jobs Cost	Posting Acc...	50300	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
F0016	Total Cost of Goods Sold	Formula	P0011..P0015	Net Change	Net Amount	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P0017		Posting Acc...		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>
F0018	Gross Profit	Formula	F0009+P0016	Net Change	Net Amount	<input checked="" type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
P0019		Posting Acc...		Net Change	Net Amount	<input type="checkbox"/>	Yes	<input type="checkbox"/>	<input type="checkbox"/>

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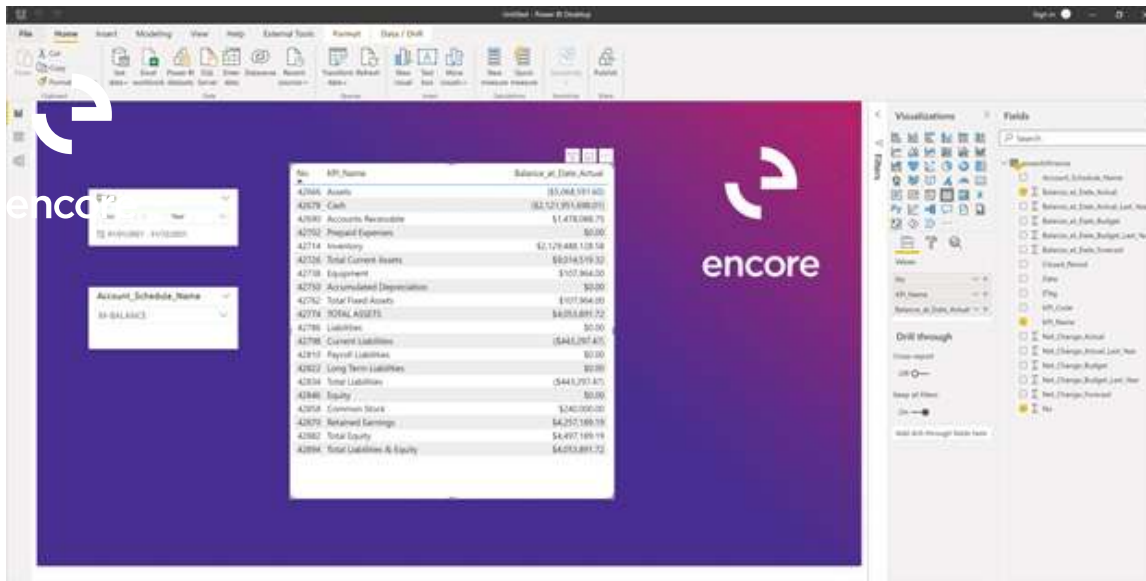
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For balance related account schedules, use Balance_at_Date_Actual field instead.

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Best Practices for Production BOMs in Dynamics 365 Business Central

In this webinar, we'll cover setting up, managing, and best practices for production BOMs in D365 Business Central. Avoid common pitfalls and optimize your BOMs for real-world manufacturing scenarios.

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Author



Justin Song

Justin is a highly qualified Senior Business Intelligence and Data Analyst who holds numerous professional certifications in accounting, business intelligence, project management, data, development and a wide range of technologies.

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