Business Central Reporting Pack Guide

A specification and acceptance workbook for finance, sales and stock.

For: Finance leaders, Business Central owners, implementation partners and BI teams

1. Define a useful first pack

A Business Central reporting pack should combine a defined business question, approved measures, traceable source data and acceptance checks. The right scope is a set of decisions your team can trust, not the largest possible collection of dashboards.

Start with the report that takes the most repeated preparation or reconciliation. Record the companies, period, currencies, dimensions and users it covers. Retain useful native reports as controls while validating the new pack.

Pack	Questions it should answer	Decisions to agree
Finance and GL	What changed in performance and balances?	Account mappings, financial periods, sign convention and budget source.
Receivables	What was outstanding at the cutoff, and what needs collection?	Ageing date, settlements, customer credits, currency and disputes.
Payables	What is owed, when is it due and what is disputed?	Vendor balances, due dates, credits and payment status.
Inventory	What quantity and value do we hold?	Item/location scope, units, expected versus actual cost and valuation cutoff.
Sales and fulfilment	What is ordered, shipped, invoiced or returned?	Event dates, partial shipments, returns and cancelled quantities.
Purchasing	What is committed, received and still outstanding?	Order/receipt/invoice relationships and the commitment definition.

Avoid accidental scope expansion

Adding companies is different from consolidating them. Agree translation rates, eliminations and account alignment separately. Confirm custom extension fields, historical data, external budgets and operational sources before assuming they are included.

Workshop output: an approved report list, one owner per pack, a metric dictionary, source controls, an access matrix and a defined acceptance test pack.

2. Write rules that survive month end

The same invoice can have a different remaining balance today from the amount outstanding at a past cutoff. Historical reporting needs a date-aware definition, not simply the latest status.

Worked example: historical receivables

Illustrative data, not a customer case. One company and currency; no tax, discounts, FX or rounding adjustments are included. The policy ages by due date. The report cutoff is 30 September 2026.

Event	Date	Amount	Effect at 30 September
Invoice posted	1 September	1,200	Include the invoice.
Invoice due	15 September	Not applicable	15 days overdue at cutoff.
Payment applied	20 September	400	Reduce the cutoff balance.
Later payment applied	5 October	300	Exclude from this earlier cutoff.

Expected historical result: 800 outstanding at 30 September, in the agreed 1 to 30 days overdue bucket. After the October payment the current balance is 500. Showing 500 in the September pack would answer a different question.

This is an acceptance scenario, not a universal DAX formula. Validate applications, reversals, unapplied cash, credits and dates against your chosen Business Central control. Microsoft documents configurable ageing bases and backdating in its reporting guidance [3].

Use a metric contract for every important KPI

Contract field	Example of a decision to capture
Population and grain	Customer/company/currency at invoice or entry level.
Time and status	Cutoff, ageing basis and treatment of future-dated or reversed entries.
Calculation	Which balances and applications contribute, including credits and disputes?
Dimensions and access	Which responsibility dimension applies, and who may see each company?
Owner and evidence	Named approver, reference report, filters, tolerance and effective date.

3. Choose the connection without losing the rules

Keep the business requirement stable while selecting a supported route for the actual Business Central environment. Online and on-premises deployments do not automatically have the same connection options.

Decision	Evidence to request
Environment	Online or on-premises, version, companies, extensions and permitted authentication.
Extraction route	Available mirroring, supported API or connector; table and field coverage; incremental handling and recovery.
Historical coverage	Initial load duration, oldest available entries and how corrections to earlier periods are captured.
Hosting and access	Environment ownership, capacity/licensing responsibility, source permissions and user access boundaries.

Treat mirroring availability as a real dependency

As checked on 29 October 2026, Microsoft labels its Business Central mirroring overview prerelease, while the FAQ describes private preview and expected public preview [1, 2]. Confirm actual tenant availability and terms. Do not build a production commitment on a roadmap date. Where unavailable or unsuitable, assess a supported alternative and its tested update frequency.

CONNECT	CURATE	USE
Capture selected source data and its position.	Validate, reconcile and apply approved business rules.	Expose agreed measures through reports and applications.

Business Central mirroring makes source data available; it does not define your management accounts or reconcile business meanings. Keep company keys in joins, make dimension mappings explicit and preserve a route back to the entries behind a figure.

Measure source-to-report freshness

Track the posting or source-change time, arrival, successful preparation and report-visible time. Check time zones. A recent report refresh can still display an old upstream position. Agree a stale-data warning and an owner who responds when the target is missed.

> A 15-minute freshness target is an end-to-end test for the agreed configuration. It is not a guarantee that every source, initial load, preview feature or bespoke transformation updates within that time.

4. Accept the numbers, access and service

A visually complete report is not sufficient evidence of a working reporting service. Record the result of each acceptance test and the owner of any exception.

Test	Pass evidence
GL and financial statements	Agreed company, account, period, dimensions and currency reconcile to source controls.
Historical ageing	The worked cutoff case passes, including payments or corrections after the cutoff.
Inventory value	Agreed actual/expected cost basis and adjustment status match the chosen source report.
Quantity and fulfilment	Unit conversions, returns and partial receipts/shipments behave as specified.
Access and recovery	Restricted users cannot see excluded data; failed or repeated loads do not silently misstate totals.
Freshness and handover	Measured delay, stale-data alert, support owner and change process are documented.

For inventory, reconcile quantity and value separately. Microsoft documents value entries and the role of cost adjustment [4, 5]. Agree the costing basis, relevant dates, adjustment status and GL posting coverage before comparing totals.

Record the launch decision

Pack / company scope: _____
Business owner / approval date: _____
Open exceptions / accountable owner: _____
Freshness evidence / support contact: _____

Where DataNova fits

Start with a defined reporting pack, then adapt mappings, measures and drilldowns around your business. DataNova can scope hosting and ongoing Managed BI with the reporting work. We target a customisable first suite within two weeks once access, required mappings and scope are confirmed. Initial loads, extensions, consolidation and extra sources can change the delivery plan. Confirm implementation, platform, capacity and support costs in the agreed quote.

Sources and next steps

Technical sources checked 29 October 2026. The worksheets and examples are DataNova recommendations, not Microsoft requirements.

1. Microsoft Learn: Business Central mirroring overview

2. Microsoft Learn: Business Central mirroring FAQ

3. Microsoft Learn: Aged Receivables, Back Dating

4. Microsoft Learn: Inventory valuation

5. Microsoft Learn: Cost adjustment

Explore the reporting pack | Companion article | Discuss your requirements