

FINANCE APP

VERSION – 1.0.0.0

DEVELOPED BY



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INTEGRATED WITH
MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

Guideline Document
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Objective

This document provides step-by-step instructions for connecting and setting up the Power BI Finance Dashboard with your organization's live data directly from Microsoft Dynamics 365 Business Central. No Excel or CSV file export is required — the dashboard connects in real time to your Business Central environment and automatically refreshes to reflect the latest data.

Pre-Requisites

Before setting up the connection, ensure the following are in place:

Requirement	Details
Business Central Access	A valid Microsoft Dynamics 365 Business Central Online environment
User Account	A Business Central user account with OData / API read permissions
Power BI Desktop or Service	Power BI Desktop (latest version) or access to Power BI Service
Microsoft 365 Account	Organizational Microsoft 365 account for OAuth2 authentication
API Pages Enabled	All required API pages must be published and accessible in Business Central
Network Access	Access to your Business Central OData V4 API endpoint URL

Step 1: Log in to Business Central and Verify Required API Pages in Business Central

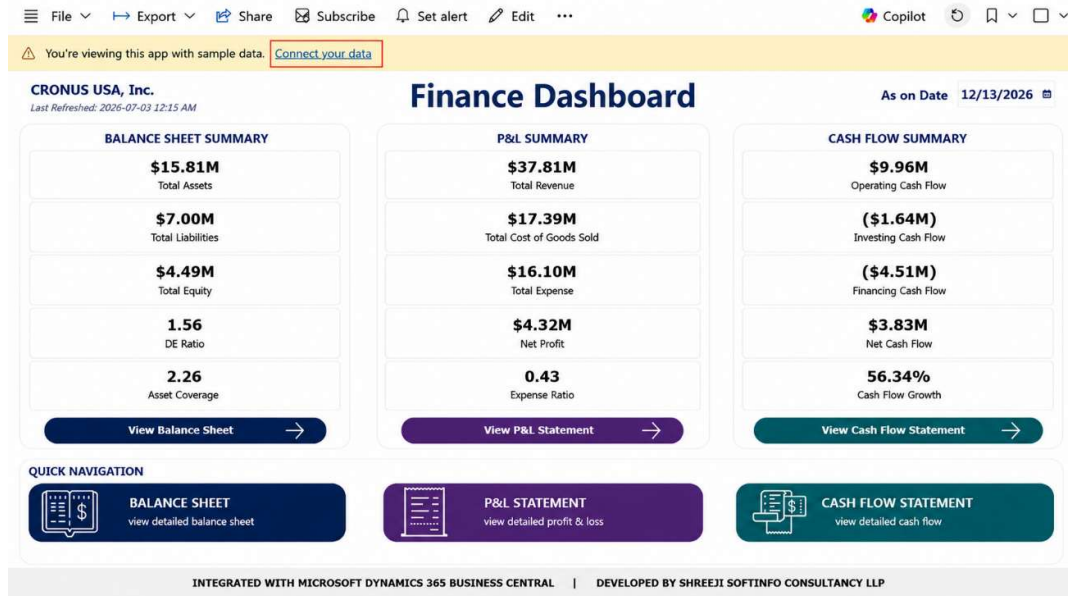
1. Log in to Microsoft Dynamics 365 Business Central.

The following API pages must be available and accessible in your Business Central environment. These are the live data sources used by the Finance Dashboard:

API Default Name	Data Provided	Required Permission
G/L Account	G/L Account No., G/L Account Name, Account Subcategory Entry No., Account Type, Income/Balance	Read
G/L Entries	Amount, Description, G/L Account No., Income/Balance, Posting Date, Source Code	Read
G/L Account Category	Account Category, additionalReportDefinition, description, entryNo	Read
Power BI Account Categories	G/L Account Category Entry No, Power BI Account Category	Read
Closing Income Statement Code	Source Code	Read

Step 2: Open the Power BI App

1. Launch the Power BI App – Finance App.
2. Navigate to the Data Connection Setup screen and Click on Connect your Data.



Step 3: Enter Business Central API Connection Parameters

1. In the connection parameters screen, enter the following:

Parameter	Value to Enter
BC OData Base URL	Your OData API base URL copied from Step 1
Company Name	Exact company name as configured in Business Central
Environment Name	Your BC environment name (e.g. Production, Sandbox)



×

Connect to Finance App

Get started setting up your app! Start by filling in the parameters.
Then, you'll authenticate to all the data sources this app connects to.

Parameters

Make sure all required (*) parameters are filled in before connecting to your data.

ENVIRONMENT *

For example: Production

COMPANY *

For example: CRONUS USA, Inc.

[Go to the app documentation](#) 

Next

Cancel

2. Click Next to proceed to authentication.

Step 4: Authenticate with Organizational Credentials

1. When prompted for authentication, select Organizational Account.
2. Sign in using your Microsoft 365 credentials (the same account used to access Business Central).
3. On the Privacy Level screen, select Organizational.
4. Click Sign in and Connect. Power BI will authenticate and begin loading data from Business Central.



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Connect to Finance App

You are connecting to

ExtensionDataSourceKind

ExtensionDataSourcePath

Authentication method

Privacy level setting for this data source [Learn more](#)

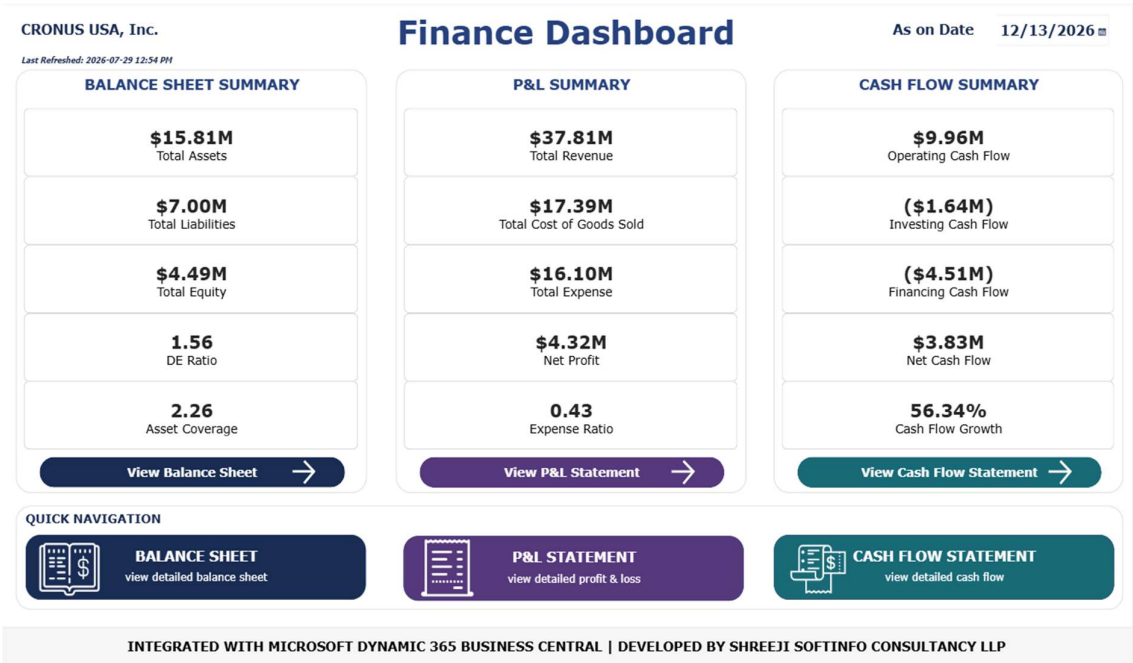
[Go to the app documentation](#)

[Back](#) [Sign in and connect](#) [Cancel](#)



Step 5: Refresh and Verify Data

- After authentication, Power BI will automatically load data from all connected API pages.
- Wait for the refresh to complete. The dashboard will display a 'Data updated' timestamp in the header once ready.
- Verify the following key visuals are populated with your live data:
 - Finance Dashboard Overview — total assets, net profit, and net cash flow as on date
 - Balance Sheet, P&L Statement, and Cash Flow Statement
 - Balance Sheet Composition, P&L Quarterly Comparison, Cash Flow Activity Distribution
 - Trend Analysis, Overview, Detailed View, Key Insights KPIs, Comparison of Previous Year, and Variance %



Success Message

If the connection is successful, the dashboard header will show the 'Data updated' timestamp and all visuals will display your organization's live data directly from Business Central.

Setting Up Automatic Data Refresh (Power BI Service)

To keep the dashboard automatically updated after publishing to Power BI Service:

8. Publish the report to Power BI Service from Power BI Desktop → File → Publish.
9. In Power BI Service, go to your Workspace → Datasets.
10. Find the Finance App dataset and click the three dots (...) → Settings.
11. Under Data Source Credentials, click Edit Credentials and sign in with your Organizational Account.
12. Under Scheduled Refresh, toggle On and configure your preferred refresh frequency.
13. Click Apply to save.

▷ Data source credentials

▷ Parameters

◀ Refresh

Time zone

① Time zone configuration is applied not only to determine the schedule refresh time but also to establish the current date and time for incremental refresh models during on-demand and API refreshes. [Learn more](#)

(UTC) Coordinated Universal Time ▼

Configure a refresh schedule

Define a data refresh schedule to import data from the data source into the semantic model. [Learn more](#)

☒ On

Refresh frequency

Daily ▼

Time

[Add another time](#)

Send refresh failure and critical warning notifications to

☒ Semantic model owner

☐ These contacts:

Enter email addresses

Apply

Discard

Note: Business Central OData API connections support up to 8 scheduled refreshes per day on Power BI Pro and 48 refreshes per day on Power BI Premium.

Additional Notes

- Ensure the user account used for authentication has Read permission on all required Business Central API pages listed in Step 2.
- For multi-company Business Central setups, the Company Name parameter must exactly match the company name as it appears in BC.
- For sandbox environments, use the sandbox environment name in the connection parameters instead of Production.
- The dashboard uses a live OData connection — no Excel or CSV file is involved. Data is always read directly from Business Central.
- Contact your Business Central administrator if any API page returns no data or access is denied.