Cashflow outstanding invoices

How to connect the Power BI app to your Business Central data

succeedIT
clear approach, proven solutions

SucceedIT's Power BI app for Dynamics 365 Business Central will give you immediate access to key debtor and creditor information.

You will see all outstanding and incoming invoices and their due date clearly presented. Managing your cashflow has never been this easy!

The application is installed and connected to your own business administration. Power BI can be viewed and managed on different devices or within your Dynamics 365 Business Central solution.
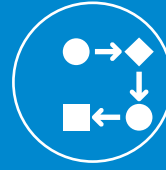
Immediate access to key debtor and creditor information

Proven standard **Pragmatic** **Personal** **Clear approach**

SucceedIT makes your work easier

SucceedIT is the consulting company for Microsoft Dynamics 365 Business Central in the Netherlands.

Quick plug & play implementations and upgrades to Microsoft Dynamics 365 Business Central.

In addition we are experts in Power BI. SucceedIT helps organizations successfully complete IT projects related to Microsoft Dynamics NAV and Microsoft Dynamics 365 Business Central.

With over 25 years of experience, SucceedIT can guide you step by step through the analysis, setup and layout of your Microsoft Dynamics 365 Business Central environment.
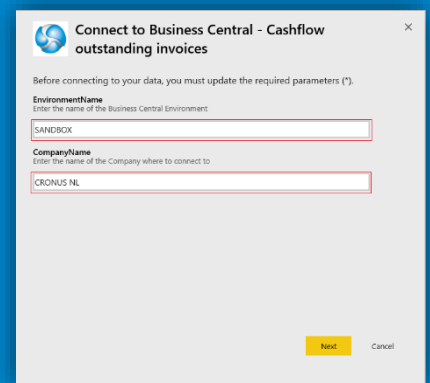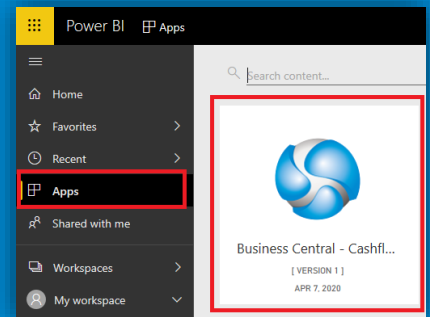
Power BI app
How to connect

1. Navigate to powerbi.com and go to apps
2. Select **Get apps** Get apps to install the app
3. Select Business Central - Cashflow outstanding invoices
4. Press **Get it now** to continue
5. Press **Install** to install the Power BI app
6. The app is now installed and can be found in the menu **Apps**
7. After installing click on the app. A wizard will start to connect the app to your environment.
8. To connect the app to your environment select **Connect your data**
9. Fill in **Environment Name** and **Company Name** where you want to connect this report to
10. After this you have to sign in with an account you can also use to connect to Business Central.
11. Done. You are ready to use the report with your own data.

Get it for free

You can install this Power BI app for free in your tenant. You only need a Power BI license. Please note there are limitations to the usage of Power BI Free. If you have any questions or would like to purchase Power BI Pro licenses please contact us at info@succeedit.nl.
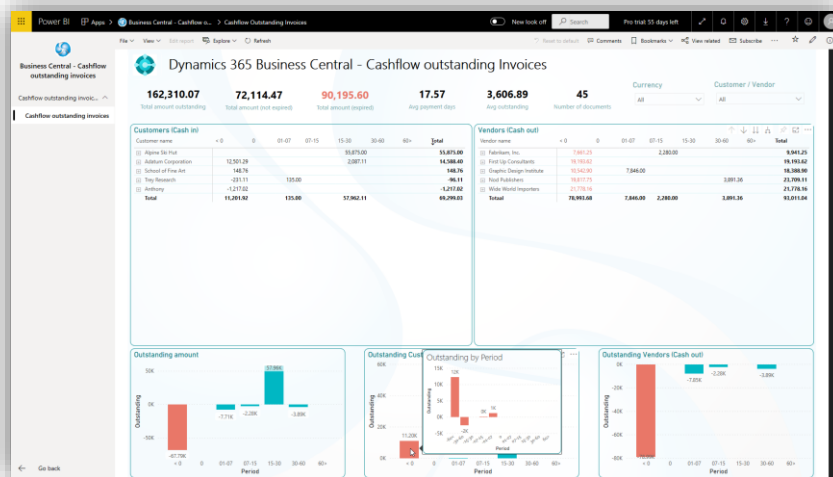
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Tips & Tricks

You can see more details of the documents when you place your mouse above the amounts in the **Customer (Cash in)** table.

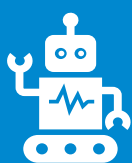To see more details of the (overdue) payments you can place the mouse above the chart.

Expand data to see more details. Drill up with the up arrow to go back to the previous view.

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