

Case Study

Advanced Reporting

How to get the functionality of Management Reporter in Business Central



About Skill Creations

Skill Creations is a human services agency operating three divisions in North Carolina: intermediate care facilities, child development, and community operations. A long-time Dynamics GP user, the agency relied on its trusted partner, ACE Micro, to guide a successful migration to a modern ERP system: Microsoft Dynamics 365 Business Central (BC).

The Challenge

While the Business Central implementation went smoothly, finance faced great difficulty adjusting to life without Management Reporter. Relying on BC's built-in reporting tools, CFO Stacy Garnett spent too much time manually compiling the data she needed to report by cost center—something she could easily do in Management Reporter.

"I just did not have what I needed. However, I could not articulate exactly what was missing. I had used Management Reporter for so long that I took its great features and ease of use for granted," Stacy shared. Skill Creations evaluated numerous reporting options, but all of them fell short.

"They had rows. They had columns. They claimed to offer drill-down, but it was limited to individual transactions. That was not helpful. With 29 reporting entities, I needed those transactions grouped by cost center so I could see what was really happening in our P&Ls, without running each center's report separately."

Determined to find the right solution, ACE Micro's consultant continued researching. "We could tell Stacy was really struggling with the capabilities available to her natively in Business Central," recalls Mark Munson, VP of Business Development at ACE Micro. "Although BC's core reporting works well for many organizations, more complex reporting needs like Stacy's often require more power. She needed the ability to drill down to details across multiple organizations, and FYIsoft provided that."

While attending Community Summit, Stacy's consultant recommended that she attend a FYIsoft session—a recommendation she continues to be grateful for. "It wasn't until I saw FYIsoft's demo that I finally knew what I had been missing. It was the 'trees' component, and no other solution offered that. As soon as I saw that demo, I was sold."

The Solution

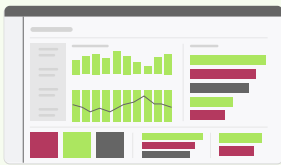
In addition to having a similar "rows, columns, trees" structure that makes it very easy to learn and use, FYIsoft offers the powerful "trees" component that reflects the company's organizational structure. This allows reports to automatically be grouped by hierarchy. Users like Stacy regain that powerful ability to report and analyze any view needed – from consolidated operations down to

individual cost centers or departments – with just a few clicks.

“This tool is what I need to analyze my business operations. With so many cost centers and tight margins, it is essential for me to be able to quickly see all the details and not only analyze how expenses fluctuate across the board, but also within each cost center. FYIsoft’s reporting tool helps me to be more analytical and strategic with just a click.”

The Results

FYIsoft is not just a replacement for Management Reporter. It is a modern cloud solution with additional features that save time and boost efficiency:



Automated Report Conversion

“When we moved to Business Central, we had to recreate all of our reports. In contrast, FYIsoft’s automated report conversion was a huge benefit. It saved me at least a week of work. The conversion and formatting were incredible. The process was seamless, all of our reports worked great, and FYIsoft’s support team was fantastic to work with.”



Automated Report Distribution

“I love the ‘one and done’ ability. With FYIsoft, I run reports once, and all 29 reports for each cost center are automatically created and sent to each recipient, exactly how they want them, whether they prefer a secure online link, PDF, or XLS. I no longer need to run individual reports, package them up, and email them.”



Enhancement to BC

Stacy found FYIsoft to be a valuable enhancement to her out-of-the-box reporting in Business Central. “I still use BC reports for quick lookups, but FYIsoft really amplifies my efficiency and ability to be strategic. The two tools are very powerful together.”

DON'T WAIT. MAKE FYISOFT PART OF YOUR BC IMPLEMENTATION

Stacy’s only regret about the migration to Business Central was the year of lost time struggling and searching for an appropriate reporting solution to replace Management Reporter. “For any Management Reporter users going through a migration to Business Central, I strongly recommend including FYIsoft in your implementation package upfront. It will save you a lot of time.”