



# AUTOMATING FINANCIAL WORKFLOWS IN BUSINESS CENTRAL

*How Eagle reduce risk, save time, and  
improve audit readiness*

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# Executive summary

Most Business Central teams spend disproportionate time repeating manual, error-prone tasks: re-filtering reports every month, navigating into multiple companies to run the same processes, assembling audit materials, and reconciling ledgers in spreadsheets.

These practices increase operational risk (missed postings, inconsistent filters), audit risk (incomplete exports, poor traceability), and time-to-close.

Eagle addresses these risks by automating recurring operational tasks (reports, pages, postings, payments) for one or many companies/tenants, enabling reusable financial statements with dynamic date filters, and centralized distribution/logging of results.

For organizations that only need KPI visibility, Eagle Free offers no-cost KPI cues in the current company. However, Eagle Free does not include multi-company operations, scheduling, function groups, distribution, or integrated reconciliations; upgrading to Eagle unlocks these automation capabilities.

To reduce reconciliation risk and improve auditability, Reconciliations for Eagle (requires Eagle) brings structured, automated reconciliations for any ledger entry, tolerance handling, line-level specifications (especially for balance sheet), and period-to-period related lines analysis—supported from Business Central v26 (2025 Wave 1) on Essential or Premium.



# The business problem & risk landscape

Repeating the same report setups for each close period invites filter mistakes and inconsistent results. Eagle's dynamic date filters make financial statements reusable, reducing manual steps and configuration drift.

Manually assembling accounting records (attachments, incoming documents, invoice sets, G/L entries) is time-consuming and prone to omissions. Eagle centralizes these exports and keeps logs of results, improving audit readiness.

Operating across many companies/tenants multiplies effort and inconsistency. Eagle enables consent-based cross-tenant operations, a unified My Companies hub, and repeatable function groups + scheduling to run tasks identically across entities.

Spreadsheet reconciliations lack controls for tolerances, specifications, and consistent period analysis. Reconciliations for Eagle standardizes these inside Business Central with workflow automations and line-level settings.





# Solution suite overview

## *Eagle - Automate recurring operations in Business Central*

### What Eagle does

- Reusable financial statements: configure once using dynamic date filters; reuse every period.
- Operational tasks & reporting at scale: set up functions for Base Application and installed apps; apply filters; group and schedule them via job queues.
- Cross-company operations: work from My Companies in the service agency tenant, opening client pages/reports, processing payments, and enqueueing actions across companies.
- Audit-ready exports: export attachments, incoming documents, G/L entries (e.g., Excel/SIE), and multiple sales invoices; log and distribute results (e.g., to SharePoint) with configurable filenames/paths/placeholders.

### Why Eagle reduces risk

- Minimizes filter inconsistencies through templates + dynamic date filters.
- Improves traceability via central logs and distribution settings.
- Standardizes multi-company tasks in one cockpit, lowering operational variance.



# Solution suite overview

## *Eagle Free — KPI visibility*

What Eagle Free does

- Create and display User-defined KPIs as role center cues; add KPIs to multiple role centers/activities; import/export KPI definitions to align views across companies.

What Eagle Free does not do

- No multi-company operational hub, function groups, scheduling, distribution/logging, or integrated reconciliations. Those require upgrading to full Eagle.





# Solution suite overview

## *Reconciliations for Eagle — Structured, automated reconciliations*

What Reconciliations for Eagle does

- Reconcile any ledger entry (sales, purchase, time, income statement, balance sheet) using workflow automations, tolerances, and line-level specifications. Related Lines support period trend analysis; summaries provide totals and counts.
- Balance Sheet reconciliations include additional configuration (grouping, specification linking, default table setups like G/L Entries per Account, and filters to include only balance sheet accounts).

Compatibility

- Supported from Business Central v26 (2025 Wave 1), Essential & Premium; installing Reconciliations for Eagle auto-installs Eagle if absent.



# Key benefits

*Time savings, error reduction, audit readiness*

## **Time savings**

Automate recurring tasks like financial statements, postings, and reconciliations. Configure once, reuse every period with dynamic date filters. Scheduling eliminates manual intervention, freeing your team for analysis instead of repetitive clicks.

## **Error reduction**

Standardize workflows using Function Groups and templates. Reduce filter mistakes and inconsistencies across reports and tasks. Automated reconciliations apply tolerances and specifications, minimizing human error.

## **Audit readiness**

Export complete accounting records—attachments, incoming documents, G/L entries, invoices—with logs for traceability. Distribute outputs automatically to SharePoint or predefined paths, ensuring compliance and evidence for every run.





# Why upgrade from Eagle Free

## *What you gain by moving to full Eagle*

Eagle Free gives you KPIs and role center cues - but stops there. Full Eagle transforms your processes:

- From visibility to action: Automate recurring tasks instead of just monitoring them.
- From manual to scheduled: Run workflows automatically via job queues.
- From isolated to integrated: Manage multi-company operations from one cockpit.
- From spreadsheets to structured reconciliations: Apply tolerances, specifications, and audit trails inside Business Central.

Bottom line: Upgrading reduces risk, saves time, and ensures compliance - while Eagle Free only shows the numbers.



# Summary

## *Why now*

Every month you repeat the same manual steps: filtering reports, posting transactions, preparing audit packs, and reconciling accounts. These tasks aren't just time-consuming—they're risky. A single missed posting or incorrect filter can lead to compliance issues, financial discrepancies, and costly delays.

Business Central gives you the tools, but not the automation. Without Eagle, you rely on human intervention for processes that should run flawlessly in the background. The longer you wait, the more exposure you have to:

- Operational risk: Errors from repetitive manual work.
- Audit risk: Missing documentation and incomplete exports.
- Efficiency loss: Hours wasted on tasks that could be scheduled and logged automatically.

Why now? Because automation isn't a luxury—it's a safeguard. Eagle and Reconciliations for Eagle turn manual chaos into controlled workflows, reducing risk and freeing your team to focus on analysis, not administration.







# Want to know more?

*Contact your  
Business Central  
partner today!*

