



SALES ANALYTICS DASHBOARD

VERSION – 1.0.0.0

DEVELOPED BY
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INTEGRETED WITH
MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

FEATURE DOCUMENT

Overview

A complete Power BI Sales Analytics solution integrated with Microsoft Dynamics 365 Business Central, designed to provide business leaders, sales managers, and executives with comprehensive visibility into sales performance, profitability, customer trends, and revenue growth.

The solution transforms transactional sales data into actionable insights through interactive dashboards, KPI indicators, advanced analytics, drill-through capabilities, and management information reports (MIS).

The dashboard enables organizations to monitor business performance in real time, identify revenue opportunities, improve sales effectiveness, and support data-driven strategic decisions.

Report Features

Sales Revenue Performance Overview

Displays Total Sales Revenue, Year-to-Date Sales, Previous Year Sales Comparison, and Growth Percentage.

Provides executives with a consolidated view of business performance and revenue growth trends.

Gross Profit & Margin Analysis

Visualizes Gross Profit and Gross Margin percentages across different dimensions.

Helps management identify profitable customers, products, and business segments.

Monthly Sales Trend Analysis

Interactive line and column charts displaying monthly sales trends and year-over-year comparisons.

Enables identification of seasonal patterns, revenue fluctuations, and growth opportunities.

Customer Sales Performance

Highlights Top Customers based on sales revenue, profitability, and transaction volume.

Supports customer segmentation and relationship management initiatives.

Product Performance Analysis

Displays Top Selling Products, Product Categories, and contribution percentages.

Provides visibility into high-performing products and inventory planning opportunities.

Salesperson Performance Dashboard

Tracks individual salesperson sales achievements, contribution percentages, and growth trends.

Helps management evaluate team productivity and performance effectiveness.

Geographic Sales Analysis

Visualizes sales performance by region, territory, branch, or country.
Supports market expansion planning and regional performance evaluation.

Sales Transaction Details

Detailed tabular report providing drill-through capability to invoice-level transactions.
Allows users to investigate revenue drivers, customer purchases, and sales variances.

Sales Growth Comparison

Compares current period sales against previous periods using variance and growth indicators.
Provides quick identification of business performance changes.

Executive KPI Summary

Consolidated KPI section displaying:

- Total Sales Revenue
 - Gross Profit
 - Gross Margin %
 - Active Customers
 - Total Orders
 - Average Order Value
 - Top Customer Contribution
 - Sales Growth %
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Key Capabilities

- Dynamic Year Selection and Period Comparison.
 - Interactive Filters for Customer, Product, Salesperson, Region, and Category.
 - Real-Time Integration with Microsoft Dynamics 365 Business Central.
 - Drill-Down and Drill-Through Functionality.
 - Advanced KPI Indicators with Conditional Formatting.
 - Executive Summary Dashboard.
 - Automated Data Refresh through Power BI Service.
 - Scalable Architecture supporting Multi-Company Reporting.
 - Mobile-Friendly Dashboard Experience.
 - Export Capability for Detailed Analysis.
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Business Benefits

Improved Revenue Visibility

Provides complete visibility into sales performance and revenue drivers.

Enhanced Decision Making

Supports faster and more informed business decisions through real-time analytics.

Better Profitability Management

Identifies high-margin customers, products, and sales opportunities.

Increased Sales Productivity

Enables sales teams to focus on high-value customers and growth opportunities.

Reduced Manual Reporting

Automates data collection, reporting, and performance monitoring.

Strategic Business Planning

Supports forecasting, budgeting, and growth planning initiatives.

Technical Integration

The Sales Analytics Dashboard is fully integrated with Microsoft Dynamics 365 Business Central.

Data is sourced from:

- Sales Invoice Header & Lines
- Sales Credit Memo Header & Lines
- Customer Master
- Item Master
- Salesperson/Purchaser
- Dimension Tables
- General Ledger Data

Power Query transformations, DAX calculations, and optimized star-schema modelling ensure high performance, scalability, and reporting accuracy.

The solution supports scheduled refreshes through Microsoft Power BI Service, providing stakeholders with the latest business insights.

Conclusion

The Power BI Sales Analytics Dashboard provides a unified and intelligent reporting platform for sales performance management.

By combining revenue analytics, profitability insights, customer intelligence, and operational reporting, the solution empowers organizations to maximize growth, improve profitability, and make confident data-driven business decisions.