



SALES ANALYTICS DASHBOARD

VERSION – 1.0.0.0

DEVELOPED BY
SHREEJI SOFTINFO CONSULTANCY LLP

INTEGRETED WITH
MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

OVERVIEW LIST DOCUMENT

Overview

The Sales Analytics Dashboard is a comprehensive Business Intelligence solution developed to transform Microsoft Dynamics 365 Business Central sales data into meaningful business insights.

The dashboard enables management, sales teams, and business leaders to monitor sales performance, customer trends, profitability, and revenue growth through interactive visualizations and advanced analytics.

By consolidating critical sales information into a centralized reporting platform, the solution empowers organizations to make data-driven decisions, identify growth opportunities, and improve overall business performance.

Purpose

The Sales Analytics Dashboard aims to:

- Monitor sales performance across customers, products, and salespersons.
 - Track Year-to-Date (YTD) sales and compare against previous periods.
 - Analyse Gross Profit and profitability trends.
 - Identify top-performing customers and products.
 - Provide actionable insights into revenue growth opportunities.
 - Enable management to make informed strategic decisions.
-

Visuals Included

1. Sales Performance Overview

Displays Total Sales, YTD Sales, Gross Profit, and Gross Margin percentages.

Provides a quick snapshot of business performance and growth trends.

2. Monthly Sales Trend Analysis

Illustrates month-over-month sales performance.

Helps identify seasonal patterns and revenue fluctuations.

3. Customer Sales Analysis

Highlights Top Customers based on sales revenue and contribution percentage.

Supports customer segmentation and relationship management.

4. Product Performance Analysis

Displays Top Selling Products and Product Categories.

Enables businesses to identify high-demand products and optimize inventory planning.

5. Salesperson Performance Dashboard

Tracks individual salesperson achievements against sales targets.

Provides visibility into team performance and productivity.

6. Gross Profit Analysis

Analyses profitability by customer, product, and period.

Helps management focus on high-margin business opportunities.

7. Geographic Sales Distribution

Visualizes sales performance by region, country, or territory.

Supports regional growth strategies and market expansion planning.

8. Detailed Sales Transaction Analysis

Provides drill-through capability to transaction-level sales details.

Allows users to investigate variances and revenue drivers.

Executive Summary Insights (Key Metrics)

- Total Sales Revenue: \$XX.XXM
- Year-to-Date Sales Growth: XX.X%
- Gross Profit: \$XX.XXM
- Gross Margin: XX.X%
- Active Customers: XXXX
- Total Orders: XXXX
- Top Customer Contribution: XX.X%
- Best Performing Product Category: XXXXX

These KPIs provide a consolidated view of sales growth, profitability, customer engagement, and operational performance.

Business Impact

Improved Decision Making

Provides real-time access to sales performance metrics and trends.

Enhanced Revenue Visibility

Enables management to identify revenue opportunities and sales risks quickly.

Increased Sales Productivity

Empowers sales teams with actionable insights and performance tracking.

Better Profitability Management

Highlights profitable customers, products, and business segments.

Reduced Reporting Effort

Eliminates manual reporting through automated Power BI dashboards.

Technical Integration

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

Data is extracted from Sales Invoices, Sales Credit Memos, Customers, Items, Salespersons, and related transactional tables.

Power Query transformations, DAX calculations, and optimized data models ensure high-performance reporting and data accuracy.

The solution supports scheduled refreshes through Microsoft Power BI Service, ensuring stakeholders always have access to the latest business information.

Conclusion

The Sales Analytics Dashboard is a strategic Business Intelligence solution designed to help organizations maximize revenue, improve profitability, and drive business growth.

By combining operational sales data with advanced analytics, the dashboard delivers actionable insights that enable faster, smarter, and more confident business decisions.