



WAREHOUSE DASHBOARD

VERSION – 1.0.0.0

DEVELOPED BY

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INTEGRATED WITH

MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

OVERVIEW LIST DOCUMENT

Overview

The Warehouse Insight Dashboard is a comprehensive Business Intelligence solution developed to transform Microsoft Dynamics 365 Business Central warehouse and inventory data into meaningful operational insights.

The dashboard enables warehouse managers, inventory controllers, supply chain teams, and business leaders to monitor inventory availability, warehouse movements, inbound and outbound operations, production activities, and supply-demand performance through interactive visualizations and advanced analytics.

By consolidating critical warehouse information into a centralized reporting platform, the solution empowers organizations to optimize inventory levels, improve warehouse efficiency, streamline operational processes, and support data-driven business decisions.

Purpose

The Warehouse Insight Dashboard aims to:

- Monitor inventory levels, stock valuation, and warehouse performance across multiple locations.
- Track inventory movements, transfers, inbound receipts, outbound shipments, production, and assembly operations.
- Analyze inventory trends, stock availability, and supply-demand balance.
- Identify operational issues such as out of stock, pending receipts, pending shipments, overdue production orders, and inventory shortages.
- Provide actionable insights to improve inventory planning, warehouse efficiency, and supply chain performance.
- Enable management to make informed operational and strategic decisions using real-time warehouse analytics.

Visuals Included

1) Home Page

Displays As on Date , Key KPI Cards Available Quantity , Total Inventory Value , Total Items , Total Locations and Navigate to Report Pages.

2) Executive Summary

Provides a consolidated overview of warehouse operations through key inventory KPIs like total inventory value, available quantity , total locations , total items sold qty , net inventory position and visuals inbound vs outbound inventory trend, top 5 locations-outstanding purchase vs sales qty, top 5 inventory value distribution, and Inventory stock details.

Enables management to quickly assess overall warehouse health and operational performance..

3) Inventory Stock Levels

Displays key inventory KPIs like Available Quantity , Total inventory value ,Out of stock Items, Outstanding Purchase Qty , Outstanding Sales Qty and visuals Top 5 Locations by Stock Quantity , Inventory Trend Over

Time , Stock by Category , Top 10 items by stock quantity , Inventory Stock Details.
Helps inventory managers maintain optimal stock levels and identify inventory imbalances.

4) Inventory Flow

Displays key inventory KPIs like Total Movement Quantity , Total Transfer Qty , Inventory In Transit , Open Transfer Orders, Pending Transfer Qty and visuals Inventory movement Trend, Transfer Quantity Trend , Categorywise Inventory Movement , Top 10 Moving Items, Transfer Order Details.

Supports efficient warehouse movement planning and inventory tracking across locations.

5) Inbound Performance

Displays key inventory KPIs like Total Purchase Orders , Total Received Qty , Pending Inbound Qty, Pending Receipts , Receipt Completion % and visuals Received Quantity Trend , Top 10 Received Items , Location-wise Received and Pending Quantity , Purchase Order Details

Helps improve supplier coordination and warehouse receiving efficiency.

6) Outbound Performance

Displays key inventory KPIs like Total Sales Orders, Total Shipped Qty , Pending Ship Qty , Pending Deliveries, Ship Completion % and visuals Shipped Quantity Trend , Top 10 shipped items , Location-wise Shipped and Pending Quantity , Sales Order Details.

Enables warehouse teams to monitor order fulfillment and improve dispatch efficiency.

7) Production & Assembly

Displays key inventory KPIs like Open Production Order , Overdue Production Orders , Production Completion % , Open Assembly Orders, Overdue Assembly Orders and visuals Production & Assembly Quantity Trend , Production Order Status Distribution , Production Completion Trend , Remaining Production & Assembly Quantity per Item , Assembly Order status distribution , Top 5 Assembly Items.

Supports manufacturing teams in monitoring production progress and assembly operations.

8) Supply vs Demand

Displays key inventory KPIs like Inventory(Quantity) , Total Supply , Planned Order Receipt , Total Demand , Project Available Balance and visuals Supply trend over time , Demand Trend over time , Item-wise Supply vs Demand , Inventory vs Projected Available Balance Trend.

Provides Drill through to the Item-wise Supply Details , and Item-wise Demand Details from Supply trend over time , Demand Trend over time.

Evaluate supply to meet customer demand.

Executive Summary Insights (Key Metrics)

- **Available Quantity:** Overall inventory quantity available across warehouse locations.
- **Total Inventory Value:** Total value of inventory available in stock.
- **Total Items:** Total number of inventory items managed.
- **Total Items Sold:** Total quantity of items sold.
- **Total Locations:** Total warehouse locations being monitored.
- **Net Inventory Position:** Current available inventory after considering supply and demand.
- **Out of Stock Items:** Items with zero available inventory.
- **Outstanding Purchase Qty :** Total quantity pending to be received.

- **Outstanding Sales Qty** : Total quantity pending to be delivered.
- **Total Movement Quantity**: Total inventory movement transactions.
- **Total Transfer Qty** : Total quantity of items transferred.
- **Inventory In Transit**: Quantity currently moving between warehouse locations.
- **Open Transfer Orders**: Total number of transfer orders that are currently open or pending.
- **Pending Transfer Qty**: Total quantity of items pending to be transferred between locations.
- **Total Purchase Orders**: Total purchase orders processed.
- **Total Received Qty**: Total quantity of items received.
- **Pending Inbound Qty**: Total quantity of items pending to be received.
- **Pending Receipts**: Total number of receipts that are still pending.
- **Total Sales Orders**: Total sales orders processed.
- **Total Shipped Qty** : Total quantity of items shipped.
- **Pending Ship Qty**: Total quantity of items pending to be shipped.
- **Pending Deliveries**: Total number of deliveries that are still pending.
- **Receipt Completion %**: Percentage of successfully completed inbound receipts.
- **Ship Completion %**: Percentage of successfully completed outbound shipments.
- **Open Production Orders**: Active production orders awaiting completion.
- **Overdue Production Orders**: Total number of production orders that are past their due date and not completed.
- **Production Completion**: Percentage of production quantity that has been completed.
- **Overdue Assembly Orders**: Total number of assembly orders that are past their due date and not completed.
- **Open Assembly Orders**: Active assembly orders awaiting completion.
- **Total Supply & Total Demand**: Overall comparison of inventory supply versus customer demand.
- **Projected Available Balance**: Expected inventory availability after fulfilling demand.
- **Inventory (Quantity)** : Overall inventory quantity available across warehouse locations.
- **Planned Order Receipt**: Total quantity of items that you plan to receive through planned orders and purchase requisitions.
- **Project Available Balance**: The current inventory quantity, planned order receipts, scheduled receipts, and gross requirements based on the data up to the most recent date available.

These KPIs provide a consolidated view of warehouse operations, inventory health, operational efficiency, production performance, and supply chain readiness, enabling proactive warehouse management.

Business Impact

Improved Warehouse Visibility

Provides complete visibility into inventory, warehouse movements, production activities, and supply-demand performance through real-time dashboards.

Enhanced Inventory Management

Helps maintain optimal inventory levels by identifying inventory shortages.

Increased Operational Efficiency

Improves warehouse receiving, shipping, inventory transfers, and production monitoring through operational analytics.

Better Decision Making

Empowers management with interactive dashboards and KPIs to make faster and more informed warehouse decisions.

Improved Supply Chain Planning

Supports better replenishment planning by analyzing supply versus demand and projected inventory availability.

Reduced Reporting Effort

Eliminates manual warehouse reporting through automated Power BI dashboards and real-time operational insights.

Technical Integration

The **Warehouse Insight Dashboard** is fully integrated with **Microsoft Dynamics 365 Business Central**.

Data is extracted from warehouse and inventory-related Business Central tables, including **Item Ledger Entries, Items, Locations, Transfer Lines, Purchase Lines, Sales Lines, Manufacturing Production Order Lines, Assembly Lines, Assembly Headers, Requisition Lines, Order Service Lines, Item Job Planning Lines, Manufacturing Production Order Components, Planning Component Lines** tables.

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

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

Conclusion

The **Warehouse Insight Dashboard** is a strategic Business Intelligence solution designed to help organizations improve inventory control, warehouse efficiency, production monitoring, and supply chain performance.

By combining inventory analytics, warehouse movements, inbound and outbound operations, production & assembly monitoring, and supply-demand planning with advanced analytics, the dashboard delivers actionable insights that enable faster, smarter, and data-driven operational decisions while improving overall warehouse productivity and business performance.