



PURCHASE INSIGHTS DASHBOARD

VERSION – 1.0.0.0

DEVELOPED BY
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INTEGRATED WITH
MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

FEATURE DOCUMENT

Overview

A complete Power BI Purchase Insights solution integrated with Microsoft Dynamics 365 Business Central, designed to provide business leaders, procurement managers, and executives with comprehensive visibility into purchasing performance, vendor spend, payables, and cost trends.

The solution transforms transactional purchase 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 procurement performance in real time, identify cost-saving opportunities, manage vendor risk, and support data-driven strategic sourcing decisions.

Report Features

Purchase Overview & Spend Summary

Displays Total Purchase Amount, Total Invoices, Total Vendors, Average Invoice Value, and Total Purchase Quantity, along with Year over Year Comparison Trend and Purchase Amount by Items.

Provides executives with a consolidated view of procurement spend and purchasing performance.

Year-over-Year Purchase Trend Analysis

Interactive line chart displaying monthly purchase trends with comparison of previous year.

Enables identification of seasonal purchasing patterns, spend fluctuations, and growth opportunities.

Vendor Performance & Concentration Analysis

Highlights Total Spend Amount, Total Vendors, New Vendors, Average Purchase per Vendor, and Outstanding Amount along with vendor-wise spend distribution and posting group analysis.

Supports vendor risk assessment, concentration monitoring, and supplier relationship management.

Vendors Scorecard

Detailed tabular report summarizing vendor-wise Spend Amount, Total Invoices, and Average Invoice Amount across the vendor base.

Allows users to drill into vendor-level details for informed sourcing and negotiation decisions.

Item & Category Purchase Analysis

Displays Total Items Purchased, Total Purchase Quantity, Average Unit Cost, and purchase distribution by item category, along with cost-versus-quantity analysis.

Provides visibility into high-volume items, category-level spend, and demand patterns across products.

Top Purchased Items

Ranks items by Purchase Amount, prior-year Purchase Amount, and Purchase Quantity with Average Unit Cost Trend Analysis.

Helps procurement teams identify high-spend items and monitor unit cost movement over time.

Payables & Outstanding Liability Tracking

Monitors Outstanding Amount, Not Due Amount, Overdue Amount, Overdue Invoice Count, and payables aging buckets by vendor and country.

Helps finance teams manage cash flow, prioritize payments, and avoid vendor penalties.

Purchase Orders Tracking

Tracks Purchase Order Amount, Outstanding Amount, Total Quantity Ordered, Outstanding Quantity, and YoY Purchase Order Amount Comparison, Top Vendors by Purchase Order Amount, Purchase Order Summary.

Enables procurement teams to monitor pending deliveries, fulfillment performance, and reduce stock-shortage risk.

Cost Analysis & Savings Opportunities

Identifies Total Cost Amount, Average Cost per Unit, Potential Savings Amount, and quarterly item cost trends, with price-increase alerts and cost-saving analysis by vendor and item.

Highlights cost drivers, price fluctuations, and opportunities for procurement savings and contract renegotiation.

Executive KPI Summary

Consolidated KPI section displaying:

- Total Purchase Amount
- Total Invoices
- Total Vendors
- Average Invoice Value
- Outstanding Amount
- Overdue Amount
- Total Purchase Order Amount
- Total Cost Amount
- Potential Savings Amount

Key Capabilities

- Dynamic Date Range Selection and Period Comparison.
- Interactive Filters for Vendor, Item, Item Category, Location, and Country.
- Real-Time Integration with Microsoft Dynamics 365 Business Central.
- Drill-Down and Drill-Through Functionality across Purchase, Payables, and Cost data.
- Advanced KPI Indicators with Conditional Formatting and Risk Alerts.
- Executive Summary Dashboard.
- Automated Data Refresh through Power BI Service.
- Scalable Architecture supporting Multi-Company Reporting.
- Mobile-Friendly Dashboard Experience.
- Export Capability for Detailed Purchase Analysis.

Business Benefits

Improved Procurement Visibility

Provides complete visibility into purchase performance and spend drivers.

Enhanced Decision Making

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

Better Cost & Vendor Management

Identifies high-cost items, concentrated vendor risk, and renegotiation opportunities.

Improved Cash Flow Management

Enables proactive tracking of payables, overdue invoices, and aging liabilities.

Reduced Manual Reporting

Automates data collection, reporting, and procurement performance monitoring.

Strategic Procurement Planning

Supports vendor diversification, cost forecasting, and budgeting initiatives.

Technical Integration

The Purchase Insights Dashboard is fully integrated with Microsoft Dynamics 365 Business Central.

Data is sourced from:

- Purchase Invoice Lines
- Purchase Credit Memo Lines
- Purchase Order Lines
- Vendor Card
- Item Card
- Item Ledger Entry
- Vendor Ledger Entry

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 Purchase Insights Dashboard provides a unified and intelligent reporting platform for procurement performance management.

By combining spend analytics, vendor intelligence, payables tracking, and cost-saving insights, the solution empowers organizations to control costs, mitigate vendor risk, and make confident, data-driven procurement decisions.