



PURCHASE INSIGHTS DASHBOARD

VERSION – 1.0.0.0

**DEVELOPED BY
SHREEJI SOFTINFO CONSULTANCY LLP**

**INTEGRATED WITH
MICROSOFT DYNAMICS 365 BUSINESS CENTRAL**

OVERVIEW DOCUMENT

Overview

The Purchase Insights Dashboard is a comprehensive Business Intelligence solution developed to transform Microsoft Dynamics 365 Business Central procurement data into meaningful business insights.

The dashboard enables management, procurement teams, and business leaders to monitor vendor spend, payables, and cost performance through interactive visualizations and advanced analytics.

By consolidating critical procurement information into a centralized reporting platform, the solution empowers organizations to make data-driven decisions, manage vendor risk, and improve overall procurement performance.

Purpose

The Purchase Insights Dashboard aims to:

- Monitor purchasing performance across Vendors, Items, Categories, and Spend.
- Track Purchase Overview, Vendor Analysis, Item & Category Analysis, Payables & Outstanding, Purchase Orders, and Cost Analysis, and compare against previous periods.
- Analyse vendor concentration, cost trends, and procurement efficiency.
- Identify procurement risk indicators such as Vendor Spend Concentration and Overdue Payables.
- Provide actionable insights into cost-saving and vendor negotiation opportunities.
- Enable management to make informed strategic procurement decisions.

Visuals Included

1. Purchase Performance Overview

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, and Top 5 Vendors by Purchase Amount, and Quick Page Navigations.

2. Vendor Analysis Summary

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 a quick assessment of the company's vendor concentration and spend distribution.

3. Vendor Spend Composition & Trend Analysis

Visualizes Vendors by Spend Amount, Spend by Vendor Posting Group, and Vendors Purchase Trend through composition and trend charts.

Tracks vendor-wise purchase movement from month to month to identify concentration and risk patterns.

4. Vendor Risk Indicators

Displays Top Vendor Spend Share, Top 3 Vendor Concentration, and automated vendor scorecard health alerts.

Flags high-risk vendor dependency positions for immediate management review.

5. Detailed Item & Category Analysis

Provides a category-wise breakdown of Purchase by Item Category, Average Unit Cost Trend, and Cost vs Quantity by item across the purchase base.

Enables drill-down into individual item balances and top purchased item totals.

6. Payables & Outstanding Overview

Displays Outstanding Amount, Not Due Amount, Overdue Amount, Overdue Invoice Count, and Overdue % of Total with Payables Aging Buckets by vendor and country.

Helps track liability exposure and prioritize payments to avoid vendor penalties.

7. Purchase Orders Analysis

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, fulfilment performance, and reduce stock-shortage risk.

8. Cost Analysis & Savings Insights

Tracks Total Cost Amount, Average Cost per Unit, Potential Savings Amount, and Quarterly Item Cost Analysis alongside Price Increase Alerts.

Highlights cost escalation with year-over-year percentage change to monitor savings opportunities.

Executive Summary Insights (Key Metrics)

- Total Purchase Amount: X.XXM (Previous Year: X.XXM, Variance: +XXX.XX%)
- Total Invoices: XXX | Total Vendors: XX | Average Invoice Value: XX.XXK
- Outstanding Amount: X.XXM — Overdue Amount: X.XXM (Overdue % of Total: XX.XX%)
- Total Cost Amount: XXX.XXK (Previous Year: XXX.XXK, Variance: -XX.XX%)
- Potential Savings Amount: XXX.XXK
- Total Purchase Order Amount: XX.XXK — XXX.XX Ordered Quantity (Outstanding Quantity: XXX.XX)
- Top Vendor Spend Share: XX.XX% x — High Concentration Risk
- Average Purchase per Vendor: XXX.XXK
- Average Unit Cost: XXX.XX (Variance: +XX.XX% vs Previous Year)

These KPIs provide a consolidated view of procurement spend, vendor concentration, payables exposure, and cost-saving opportunities, enabling proactive procurement management.

Business Impact

Improved Procurement Decision Making

Provides real-time access to purchase, vendor, payables, and cost metrics.

Enhanced Vendor Visibility

Enables management to quickly identify vendor concentration risk, payables exposure, and cost trends.

Increased Procurement Control

Empowers procurement teams with drill-down detailed views across vendors, items, and orders.

Better Risk Management

Highlights early-warning indicators, such as vendor concentration and overdue payables, to flag high-risk positions for review.

Reduced Reporting Effort

Eliminates manual procurement reporting through automated Power BI dashboards.

Technical Integration

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

Data is extracted from the Purchase Invoice, Purchase Order, Vendor Master, Item Master, Vendor Posting Group, and related procurement 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 procurement information.

Conclusion

The Purchase Insights Dashboard is a strategic Business Intelligence solution designed to help organizations strengthen procurement control, manage vendor risk, and drive sustainable cost savings.

By combining Vendor, Item, Payables, and Cost data with advanced analytics, the dashboard delivers actionable insights that enable faster, smarter, and more confident procurement decisions.