

Canned Power BI Reports for Microsoft Dynamics 365 Business Central

SMARTER DECISIONS. STRONGER OUTCOMES.

— Canned Power BI Insights. Configured for Dynamics 365 Business Central. Measurable Impact. —

WHY CHOOSE CANNED POWER BI?



FASTER TIME TO VALUE

Pre-built, industry-aligned dashboards for quick deployment.



BEST PRACTICE INSIGHTS

Powered by proven KPIs and data models built by experts.



COST-EFFECTIVE

Lower development effort and cost compared to custom builds.



TRUSTED & SECURE

Built on Microsoft Power BI with enterprise-grade security and governance.



ACTIONABLE & SCALABLE

Designed to help you monitor performance, uncover trends and drive growth.



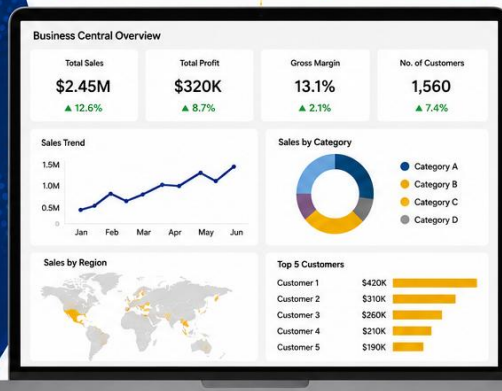
Microsoft Dynamics 365
Business Central



Power BI



Pre-configured Canned Power BI Reports
Built on Dynamics 365 Business Central Data



OUR SERVICES – HOW WE SUPPORT YOU



REQUIREMENTS & DISCOVERY

We understand your business goals and identify the right canned dashboards.



DATA CORRECTION & PREPARATION

We review and correct your Chart of Accounts (COA) and master data (dimensions, items, customers, vendors, etc.) to ensure data accuracy and consistency.



DEPLOYMENT & CONFIGURATION

Quick setup and configuration with your Dynamics 365 Business Central data.



CUSTOMIZATION & ENHANCEMENTS

Tailor dashboards and reports to match your unique business needs.



TRAINING & ONGOING SUPPORT

We empower your team and provide continuous support for long-term success.



MAKE DATA-DRIVEN DECISIONS

Empower your team with real-time, actionable insights.



IMPROVE PERFORMANCE

Track KPIs, monitor trends and uncover opportunities for growth.



REDUCE RISK & COST

Standardized reports with trusted data ensure better control and compliance.



FOCUS ON WHAT MATTERS

Spend less time on reporting and more time driving business forward.



PARTNER WITH US to unlock the full potential of Canned Power BI on Dynamics 365 Business Central and turn insights into impact.

Table of Contents

1. Canned Power BI Reports	3
1.1 Licensing Requirements	3
1.2 Power BI apps/reports for functional areas	3
2. Finance Power BI App	4
3. Sales Power BI App	5
4. Power BI Purchasing App	7
5. Power BI Inventory App	8
6. Power BI Inventory Valuation App	9
7. Power BI Project App	10
8. Power BI Manufacturing App	11
9. Power BI Subscription Billing App	12
10. Power BI Sustainability App	13

1. Canned Power BI Reports

Pre-built (out-of-the-box) **Power BI reports** are provided within **Microsoft Dynamics 365 Business Central** to enable quick insights **without requiring custom report development**. These reports help users **monitor business performance, track KPIs, and make data-driven decisions** directly from Business Central.

1.1 Licensing Requirements

- To install and use Power BI apps in Business Central, users must have a **Power BI Pro license**. This applies to the user installing the app, refreshing data, and all users accessing reports.
- As an alternative, organizations can use **Power BI Premium** or **Microsoft Fabric capacity**, which **allows report access** without requiring **individual Power BI Pro licenses for each user**.

1.2 Power BI apps/reports for functional areas

Power BI apps in Business Central are available across key functional areas, enabling insights into different business operations. These include:

- **Finance**
- **Purchasing**
- **Sales**
- **Inventory**
- **Inventory Valuation**
- **Projects**
- **Manufacturing**
- **Subscription Billing**
- **Sustainability**

These apps provide pre-built analytics tailored to each function for better decision-making.

2. Finance Power BI App

Provides insights into the organization's financial performance and overall health, including revenue, expenses and profitability trends.

Embedded Power BI reports in Business Central deliver interactive, KPI-driven analytics, enabling executives, managers, and finance staff to access high-level insights, trend analysis, and detailed operational data in one place.

Finance Power BI Reports

Report Name	Description
Financial Overview	Provides a snapshot of financial health with key KPIs like revenue, profitability, and stability.
Income Statement	Compares income statement accounts monthly to analyze net changes over time.
Balance Sheet	Tracks and compares balance sheet accounts over time on a monthly basis.
Budget Comparison	Compares G/L budgets with actuals to identify monthly variances.
Liquidity KPIs	Analyzes liquidity using ratios like current, quick, and cash ratios.
Profitability	Evaluates gross and net profit trends along with margins and cost drivers.
Liabilities	Analyzes liability balances and related metrics like debt ratio and debt-to-equity ratio.
EBITDA	Provides insights into EBITDA and EBIT along with operating revenue and expenses.
Average Collection Period	Tracks how long it takes to collect receivables and identifies trends.
Aged Receivables (Back Dating)	Categorizes customer balances into aging buckets based on payment timelines.
Aged Payables (Back Dating)	Categorizes vendor balances into aging buckets with payment term analysis.
General Ledger Entries	Provides detailed analysis of G/L entries with dimension-based filtering.
Detailed Vendor Ledger Entries	Analyzes transactions in vendor ledger and sub-ledger.
Detailed Customer Ledger Entries	Analyzes transactions in customer ledger and sub-ledger.
Late Payments Receivables	Examines late customer payments and their financial impact.

3. Sales Power BI App

Provides comprehensive sales analytics across the organization, helping track performance, growth trends, and revenue insights. Enables executives, managers, and sales teams to monitor targets, analyze top customers/items, and drill down into detailed sales data.

Sales Power BI Reports

Report Name	Description
Sales Overview	Provides a high-level view of sales activity, including posted and unposted sales quantities and amounts.
Daily Sales	Analyzes sales by weekday using heat maps to identify daily sales patterns.
Moving Average	Smooths sales trends using a 30-day moving average to reduce fluctuations.
Moving Annual Total	Shows aggregated sales over a rolling 12-month period for long-term trend analysis.
Period-Over-Period Growth	Compares sales across different periods such as year-over-year, quarter-over-quarter, or month-over-month.
Month-To-Date	Tracks cumulative sales performance within the current month.
Sales by Item	Analyzes sales performance by item, including contribution to total sales.
Sales by Customer	Provides customer-wise sales insights with profitability and contribution metrics.
Sales by Salesperson	Evaluates individual salesperson performance based on key sales metrics.
Sales by Location	Analyzes sales performance across different locations with profitability insights.
Actual vs. Budget	Compares actual sales against budgeted targets to identify variances.
Opportunity Overview	Tracks sales opportunities, estimated values, and conversion performance.
Sales Quote Overview	Provides insights into sales quotes and potential customer deals.
Return Order Overview	Analyzes return orders, return rates, and related sales impact.
Sales Demographics	Examines customer behavior and sales distribution across demographic segments.
Sales Decomposition	Breaks down sales performance by factors like location, category, and region.
Key Sales Influencers	Identifies key drivers impacting sales performance and trends.
Sales by Projects	Tracks sales performance related to projects, including amounts and quantities.
Sales Forecasting	Provides predictive insights into future sales across customers, items, and salespersons.
Customer Retention Overview	Analyzes customer loyalty, repeat purchases, and churn trends.

Customer Retention History	Reviews historical customer retention trends over time.
-------------------------------	---

4. Power BI Purchasing App

Provides detailed purchasing analytics in Business Central to help organizations monitor spending, control costs, and improve procurement efficiency across vendors, items, and locations.

Supports executives, managers, and purchasing teams with insights into budgets, purchase trends, and vendor performance for better decision-making and cost optimization.

Purchasing Power BI Reports

Report Name	Description
Purchases Overview	Provides a high-level summary of purchasing activities, including total amounts, outstanding amounts, received but not invoiced values, and invoiced amounts.
Purchase Decomposition	Breaks down purchase costs by categories, vendors, fiscal periods, and document types for detailed analysis.
Daily Purchases	Analyzes day-to-day purchasing activity and highlights spending trends, fluctuations, and anomalies.
Moving Averages	Uses a 30-day moving average to analyze purchasing trends and smooth out variations.
Moving Annual Total	Shows total purchases over a rolling 12-month period for long-term trend analysis.
Period-Over-Period	Compares purchasing data across different time periods such as month, quarter, or year.
Year-Over-Year	Identifies purchasing performance trends over time for comparison across years.
Purchases by Item	Analyzes purchasing activity by item to identify high-cost or frequently purchased items.
Purchases by Vendor	Highlights vendor-wise purchasing distribution and key supplier dependency.
Purchases by Purchaser	Tracks purchasing performance by individual purchasers or teams.
Purchases by Location	Provides insights into purchasing patterns across different warehouse or business locations.
Actual vs Budget	Compares actual spending against budgeted amounts to ensure financial control.
Purchase Return Overview	Analyzes purchase returns, return rates, and their financial impact on the organization.
Purchase Quote Overview	Provides insights into purchase quote activities and prospective vendor engagement.
Key Purchase Influencers	Identifies key drivers and factors impacting purchasing performance.
Purchase Forecasting	Projects future purchase amounts using forecasting across vendors, items, and purchasers.
Vendor Quality Analysis	Evaluates vendor performance based on quality, returns, reliance, and discount trends.

5. Power BI Inventory App

Provides inventory analytics in Business Central to help monitor stock levels, movement, and availability across locations, ensuring optimal inventory control. Enables leadership, managers, and warehouse teams to track stock turnover, manage demand, and prevent overstocking or shortages.

Inventory Power BI Reports

Report Name	Description
Inventory Overview	Provides a high-level view of inventory including scheduled receipts, gross requirements, and stock across locations.
Inventory by Item	Reviews inventory levels for items across different document types.
Inventory by Location	Shows inventory distribution across locations to identify where stock is held.
Purchase and Sales Quantity	Analyzes purchase and sales quantities to balance supply and demand.
Item Availability	Displays overall inventory status along with gross requirements, receipts, and planned production.
Gross Requirement	Analyzes required stock volume to meet demand by document type.
Scheduled Receipt	Shows incoming stock quantities categorized by document type.
Inventory by Lot	Displays inventory quantities based on lot numbers.
Inventory by Serial No.	Displays inventory quantities based on serial numbers.
Bin Contents	Analyzes inventory levels across bins and identifies bins with active picks.
Bin Contents by Item Tracking	Provides bin-level inventory insights along with item tracking details.

6. Power BI Inventory Valuation App

Provides insights into inventory costs and valuation in Business Central, helping organizations monitor stock value and make cost-effective decisions.

Enables leadership to analyze inventory value by item and location for better financial control and cost management.

Inventory Valuation Power BI Reports

Report Name	Description
Inventory Valuation Overview	Provides a high-level view of total inventory value and key balances.
Inventory Valuation by Item	Analyzes inventory value at the item level, including increases and decreases.
Inventory Valuation by Location	Reviews inventory value across locations to identify where stock value is concentrated.

7. Power BI Project App

Provides project analytics in Business Central to help project managers track performance, costs, and profitability across all projects. Enables visibility into project progress, budgeting, invoiced sales, and task scheduling to ensure timely and profitable project completion.

Project Power BI Reports

Report Name	Description
Project Overview	Provides a high-level view of all projects with key performance metrics.
Project Tasks	Displays all project tasks along with their associated costs and prices.
Project Profitability	Analyzes profitability of each project to ensure financial targets are met.
Project Realization	Shows project completion and realization statistics.
Project Performance to Budget	Compares project performance against planned budgets.
Project Invoiced Sales by Type	Breaks down invoiced project sales by sales line type.
Project Invoiced Sales by Customer	Analyzes project sales based on customers contributing most revenue.
Project Timeline	Visualizes project tasks and schedules using a Gantt-style timeline view.

8. Power BI Manufacturing App

Provides manufacturing analytics in Business Central to help improve production efficiency, resource utilization, and decision-making across manufacturing operations. Enables monitoring of work centers, production orders, capacity usage, and costs to identify bottlenecks and optimize overall manufacturing performance.

Manufacturing Power BI Reports

Report Name	Description
Current Utilization	Analyzes real-time usage of work centers to optimize production processes.
Historical Utilization	Reviews past work center usage to identify trends and plan future capacity.
Work Center Load	Provides insights into work center capacity and identifies production bottlenecks.
Machine Center Load	Analyzes machine center load and capacity to balance production workload.
Allocated Hours	Tracks allocated hours per work center to understand resource utilization.
Expected Capacity Need	Forecasts capacity requirements based on production orders.
Finished Production Order Breakdown	Provides detailed analysis of completed production orders by item and work center.
Consumption Variance	Tracks variance in material consumption to improve production efficiency.
Capacity Variance	Identifies differences between planned and actual capacity usage.
Average Production Times	Analyzes production time per item and work center for planning improvements.
Released Production Orders	Tracks released production orders to ensure timely completion.
Production Scrap	Monitors production waste to reduce cost and inefficiencies.
Production Order Overview	Provides overall analysis of production orders including cost and completion rates.
Work Center Statistics	Evaluates efficiency and performance of work centers using KPIs and metrics.
Machine Center Statistics	Evaluates machine center performance and utilization efficiency.
Prod Order - List	Displays current production orders with key operational metrics.
Prod Order Routing Gantt	Visualizes production tasks and schedules using a Gantt chart.
Production Order WIP	Analyzes work-in-progress inventory and production order valuation over time.

9. Power BI Subscription Billing App

Provides insights into the performance and health of subscription-based businesses by tracking key recurring revenue metrics such as growth, churn, and contract value. Enables executives, finance, and operational teams to analyze revenue trends, understand drivers like churn and upgrades, and ensure accurate billing and revenue recognition.

Subscription Billing Power BI Reports

Report Name	Description
Subscription Billing Overview	Provides a high-level view of subscription business performance including key KPIs such as recurring revenue, growth, and stability.
Revenue Year-Over-Year	Compares revenue across years to analyze long-term growth trends.
Revenue Analysis	Breaks down revenue performance across key dimensions for detailed financial insight.
Revenue Development	Explains revenue changes by showing churn, upgrades, downgrades, and new business.
Churn Analysis	Analyzes customer cancellations and revenue loss due to churn.
Revenue by Item	Shows revenue contribution by product or service item.
Revenue by Customer	Analyzes revenue distribution across customers.
Revenue by Salesperson	Tracks revenue performance by sales representative.
Total Contract Value Year-Over-Year	Compares total contract value across years for long-term subscription growth tracking.
Total Contract Value Analysis	Provides detailed breakdown of total contract value across subscriptions.
Customer Deferrals	Tracks deferred revenue related to customers for correct revenue recognition.
Vendor Deferrals	Tracks deferred costs or vendor-related deferrals.
Sales and Cost Forecast	Provides forward-looking forecasts of revenue and associated costs.
Billing Schedule	Ensures subscription contracts are billed correctly and on time.
Subscription Billing KPI Overview	Summarizes key KPIs and metrics used across the subscription billing model.
Subscription Billing Semantic Model	Provides access to the underlying data model supporting Power BI reports.
Setting up the Subscription Billing Power BI app	Technical guidance report for configuring job queues and ensuring accurate KPI calculations.

10. Power BI Sustainability App

Provides sustainability analytics in Business Central to help organizations track and reduce environmental impact through ESG-focused reporting. Enables monitoring of emissions, water and waste usage, carbon reduction progress, and social metrics to support sustainability goals and compliance.

Sustainability Power BI Reports

Report Name	Description
Sustainability Overview	Provides a high-level view of key sustainability and ESG metrics across the organization.
Journey to Net Zero Carbon	Tracks progress toward achieving net zero carbon emissions goals.
Realized Emissions vs Target	Compares actual emissions against defined sustainability targets.
Realized Emissions vs Baseline	Compares current emissions against a baseline period to track progress over time.
Water and Waste Analysis	Analyzes water and waste usage across facilities and locations.
Emissions by Category and Scope	Breaks down emissions by category and scope to identify emission sources.
CO2e Analysis	Provides detailed insights into CO2 equivalent emissions and carbon credit usage.
CO2e Key Influencers	Identifies key drivers impacting CO2 emissions trends.
CO2e Decomposition Tree	Breaks down CO2 emissions into contributing components for detailed analysis.
Social Analysis	Provides ESG-related social insights such as employee and workforce data.