Plug-n-Play Power BI reports to get Data insights from Dynamics 365 Business Central

Are you looking to get insights from your Business Central data and integrate it with Power BI?

Intech Systems has developed Plug-n-Play Power BI reports that are integrated with Dynamics 365 Business Central and provide Sales, Finance, Purchase, Inventory, and Accounts insights. The table below shows a quick overview of KPIs and Insights included in these reports.

Report Name	KPI's	Slicers
Accounts Payable	Total Outstandings, Total OverDue, Top 10 Vendors Outstanding, Top 5 Vendor Group wise Outstandings, Currency code wise outstanding, Top 10 Vendorwise purchase for current fiscal year, Top 10 Outstanding by Global dimension, Vendor wise outstanding, Ageing report on posting date and due Date, Invoice vs payment	Date, Company, Vendor, Global Dimension, Vendor Posting Group
Accounts Receivable	Total Outstandings, Total OverDue, Top 10 Customer Outstanding, Top 5 Customer Group wise Outstandings, Currency code wise outstanding, Top 10 Customerwise Sales for current fiscal year, Top 10 Outstanding by Global dimension, Customer wise outstanding, Ageing report on posting date and due Date, Invoice vs Collection	Date, Company, Customer, Global Dimension, Customer Posting Group
Finance	Avg daily sales, Avg expense per day, Avg monthly sales, Income, Expense, Assets, Equity, Surplus/Deficit, Surplus/Deficit%, Liabilities, Expense by subcategory, Income expense and Surplus/Deficit by Month year, Income by subcategory, Assets and liabilities, Equity by month and Equity subcategory, Amount by subcategory, Assets and liabilities by month	Date, Year, Month and Company
Sales	Total Sales, Monthly sales, Customer wise sales, Type wise sales, Top 10 Item wise sales, Document type wise sales, Location wise sales, State code wise sales, Dimension code 1 wise sales, Customer posting group wise sales, Invoice wise profit margin, Same period last year comparison	Date, Company, Customer, Global Dimension1, Item, Posting Group
Purchase	Total Purchase, Monthly Purchase, Vendor wise Purchase, Type wise Purchase, Item wise Purchase, Document type wise Purchase, Location wise Purchase, State code wise Purchase, Dimension code 1 wise Purchase, Vendor posting group wise Purchase, G/L wise purchase, Current FY and last FY Purchase comparison, Document no and Item no wise purchase details	Date, Company, Vendors, Global Dimension1, Item, Posting Group
Inventory	Posting group wise value, Top 10 Location wise value, Top 10 Global Dismension1 wise Value, Qty by unit measures, Category wise values, Top 10 Item wise value, Entry type wise value, Stock Details, Item Ageing Report	Date, Company, Posting Group, Item Category, Item, Location, Global Dimension1

Our certified and experienced professionals assist clients in transforming raw data into valuable business insights.

Intech Systems has successfully implemented Plug-n-Play Power BI solutions for multiple clients, providing them with detailed insights that are quick and cost-effective.
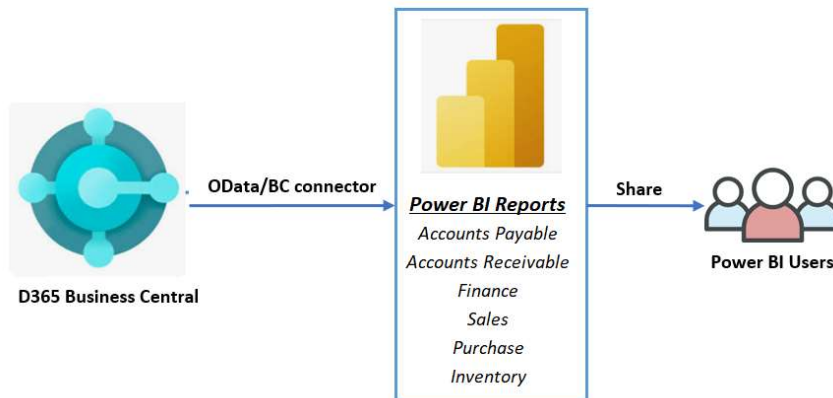
Deliverables:

1. Deliver 6 Power BI reports as per details seen in Annexure -1

   📄 **PDF**
   Annexure 1 -
   Plug-n-Play Power BI

   a. Accounts Payable Report
   b. Accounts Receivable Report
   c. Finance Report
   d. Sales Report
   e. Purchase Report
   f. Inventory Report

   The figure below shows the architecture for Plug-n-Play Power BI reports with D365 Business Central.

2. A list of KPIs and Visuals shown in Annexure-I will be delivered.
3. Power BI will connect only to the following D365 Business Central tables and the required APIs will be created:

detailVendorLedgerEntries	itemApplicationEntries	vendors
vendorLedgerEntries	itemLedgerEntries	itemCategories
customLedgerEntries	locations	G_LEntries
detailCustLedgerEntries	customers	Chart_of_Accounts
valueEntries	items	

4. Testing of reports (data comparison between Power BI and D365 Business Central)
5. Implementation Timeline: 5 working days

Scope Exclusions:

1. Any customization to KPIs and Visuals shown in Annexure-1 is not included.
2. Any additions of KPIs, Visuals, and D365 Business Central tables are not included.
3. Any change in architecture is not included.
4. Power BI and Business Central license cost is not included.

The separate estimation will be prepared and will be shared with the Client for approval if any customization or addition is required. Changes can then be developed post the Client's approval.

Responsibility of Client

1. The client has the right subscription and licenses for Power BI, D365 Business Central, and other applications. If any licenses/subscriptions are needed, then they will be procured by the Client.
2. Provide Intech consultants with all process details, documents, credentials, etc. for analysis and development. The following credentials are required:
   a. Generic Email ID
   b. Power BI PRO Licence
   c. Business Central Environment Access
3. Any Functional and Technical support on D365 Business Central is to be provided by the client. If D365 Business Central support is required from Intech Systems, it will be charged separately and will have to be approved by the Client.
4. Arrange knowledge transfer to the Intech team and provide with required logic and KPIs to be developed in Power BI for new/customized reports. Applicable only if customization is requested.
5. Acceptance of reports is considered on the integration of 6 Plug-n-Play Power BI reports with D365 Business Central.