

Power BI Reporting for Dynamics 365 for Nonprofits

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Looking for quick and accurate reports that you can access anytime, anywhere?

For charity finance teams, quick access to accurate and real-time reports is crucial for everyday operations. However, charities often face the challenge of managing and distributing reports in various formats, which typically falls on staff members who juggle this alongside their main duties. This method is not only time-consuming but also prone to errors in data. Furthermore, the lengthy process of drafting, creating, reviewing, and distributing reports means they're often outdated by the time they're ready.

To resolve these issues, we've developed our Power BI reporting module, which includes SORP Reporting. This enhancement significantly upgrades the reporting functions available in Dynamics 365 Business Central, making it easier and more efficient for charities to get the up-to-date information they need.



What's Included:

Power BI comes with a standard set of reports with segmentation and filtering functionality via the two global dimension codes available, including the analysis of:

- Inventory
- Cash
- VAT
- Customer Turnover by Period
- Income by Dimension
- Supplier Turnover by Period
- Trial Balance (with period, date and day filters)
- Budget
- Budget and Actual
- Debtors
- Creditors
- Purchases by Dimension
- General Ledger Daybook
- SoFA Reports
- Income Statement by month
- Income and Expense Analysis
- Balance Sheet
- Balance Sheet Analysis
- Fixed Assets

Power BI Reporting

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Key Features & Benefits

Our Power BI reporting module offers several user-friendly features to help charities manage their finances more efficiently:

- It allows a quick and visual understanding of financial reports.
- The reporting is both data-driven and visual, with the ability to delve into the details or view summaries as needed.
- Users can easily create reports on their desktops and then publish them to the cloud.
- All reports are directly accessible through Power BI.
- In the cloud, reports can be set to automatically refresh every hour, daily, or weekly.
- The module is mobile-friendly, enabling access to data from anywhere.
- It integrates smoothly with PowerPoint, allowing for easy conversion of reports into management presentations with just a click.
- Additional reporting features are available as add-ons, giving users a comprehensive overview across various systems.
- These functionalities enhance the reporting capabilities within Dynamics 365 Business Central, making it easier for charities to stay informed and make data-driven decisions.



Less emails

The need for files being sent via email is avoided as they can instead be shared online.



Transparent

Is fully transparent to transaction level via drilldown functionality.

Multiple data sources

Add-on capabilities include the ability to incorporate data sources from other systems.



Additional Key Advantages:

Saves time

The time spent downloading information into Excel is reduced.

Instant reports

Reports of financial information are created instantly.

Improve efficiency

Users can work more efficiently and see potential issues before they arise.



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