



Microsoft Power BI Integration with Dynamics 365 F&O for Sales & Inventory Dashboards

Microsoft Power BI Integration with Dynamics 365 F&O for Sales & Inventory Dashboards

WHO WE ARE

“ UB Technology Innovations is a leading provider of Power BI services, offering expertise in crafting exceptional dashboards. Our expertise assists clients in their digital transformation endeavors by streamlining the process and gaining a competitive advantage through rapid app deployment ”

WHAT WE DO

- Compliance and Security
- Enhance Productivity
- Improve Time to Market
- Reduce Operational Costs
- Maximize Profits
- Customer Experience



THE CLIENT

The client is a well-established food manufacturing company with a long history in the market. They produce a wide range of baked products for both retail and food-service customers. By combining traditional recipes with modern production methods, the company serves cafés, restaurants, and large distributors with consistent quality. Their focus on taste, reliability, and product variety has earned them a strong reputation as a preferred supplier in the baked goods industry.



CHALLENGES

The client was using Dynamics 365 Finance & Operations for their financials, supply chain, manufacturing, and operations on a unified platform. However, without the right reporting setup, even the most valuable information can remain underused. They wanted to move away from manual Excel downloads and instead have a connected view of their operations inside Power BI. Before this could happen, there were some key challenges to solve:

- No direct link between F&O and Power BI: The client’s teams had to export raw data from F&O into spreadsheets before any analysis could be done, which was slow and repetitive.
- Large and complex datasets: F&O held information across multiple modules (from inventory to sales), making it difficult to compile a single, structured view for decision-making.
- Multiple regions and currencies: Sales data came from different regions, and there was no automated way to apply daily currency conversions for accurate reporting.
- No unified dashboards: Without a connected reporting system, leadership teams could not see real-time trends or track performance across the supply chain.



www.ubtiinc.com



info@ubtiinc.com



+1 (714) 912-1600





SOLUTION

The client wanted an easier way to see their Finance and Operations (F&O) data inside Power BI, without downloading huge Excel files every time. With our team's technical and functional proficiency in F&O, we set up a system connecting both tools and updating the reports automatically. Here is how we did it:

- **Connected F&O to Azure using OData:** With secure access provided to the client's F&O system, we used OData (Open Data Protocol) to fetch the required data. This allowed us to pull information directly from the source in formats like XML and JSON.
- **Stored Data in Azure SQL Database:** The extracted data was sent to the client's Azure SQL (cloud-based storage) database, so that it was always available in one place for reporting.
- **Automated Data Movement with Azure Data Factory:** Using Data Factory pipelines, we scheduled and automated the process of fetching fresh data from F&O and updating the database, ensuring that Power BI always had the latest information.
- **Applied Data Engineering for Performance Optimization:** The raw data fetched from F&O was cleaned, transformed, and structured in Azure before being sent to Power BI. This included identifying around 20 key tables (selected from over 4,000 available), migrating and transforming them along with 15 stored procedures, and setting up Azure Data Factory pipelines to manage the flow.
- **Automated Daily Currency Updates:** The system automatically added that day's currency exchange values to the dataset, ensuring all calculations and reports reflected the most accurate and up-to-date rates.
- **Integrated Multiple F&O Modules:** From inventory tracking to detailed sales performance, we created visual dashboards that allowed managers to view line items across the supply chain, compare regions, and make faster business decisions.



SOLUTION BENEFITS

The integration of Dynamics 365 F&O with Power BI through Azure brought the client several clear advantages:

- **Real-Time Insights Without Manual Work:** Teams no longer had to export large Excel files from F&O. All data now flows automatically into Power BI, ready for instant analysis.
- **Faster Decision-Making:** Leadership can see updated dashboards at any time, covering sales, monthly invoices, stock level, and more, without waiting for manual report preparation.
- **Optimized Performance for Large Datasets:** Data engineering in Azure means even massive datasets load quickly in Power BI, allowing smooth interactions without delays.
- **Scalable Setup for Future Needs:** If new F&O modules or additional data sources must be integrated later, the existing ADF pipelines can be extended without redoing the entire setup.
- **Improved Currency Accuracy:** Daily exchange rate updates ensure that regional comparisons and global sales performance metrics are always based on correct values, avoiding costly miscalculations.



www.ubtiinc.com



info@ubtiinc.com



+1 (714) 912-1600



Conclusion:

The Dynamics 365 F&O to Power BI integration moved the client's reporting from a slow, manual, Excel-heavy process to a fully automated, real-time analytics environment. Leadership teams can now track sales, inventory, or other operational metrics across multiple regions without delays, while daily currency updates ensure financial accuracy. UB Technology Innovations, Inc. continues to deliver intelligent, scalable data solutions that help enterprises turn complex ERP data into valuable insights for prompt, more confident decision-making.



ABOUT US

UB Technology Innovations, Inc. (UBTI) is a leading global technology solution provider with over 3 decades of experience across all industries, specializing in Capital Markets (Asset Management), Logistics, and Healthcare. We are the preferred Microsoft Solutions Partner backed by a world-class team of Microsoft Certified experts with rich experience in Azure Cloud Platform and Data Analytics.



UB Technology Innovations, Inc.
2401 E Katella Ave, Suite 450
Anaheim, CA 92806



www.ubtiinc.com



[company/ubti](https://www.linkedin.com/company/ubti)



info@ubtiinc.com



+1 (714) 912-1600



Connect us

