Power BI Departmental Demos

Sales

Target audience: Microsoft Sellers (TSPs, SSPs)

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# About this demo

## Goals

The goal of this demo is to showcase the Power BI capabilities in the context of common departmental business scenarios. Different departments in an organization have different needs for the type of data, reports and visualizations that they use to monitor their business and find new insights. This demo will show how Power BI can be used by a Sales department in the following scenarios:

• Pipeline Report

• Sales Performance

• Quota

• Trends

## Prerequisites

This demo requires a Power BI account (e.g. trial account) which can be completed with a few steps at http://powerbi.com.

# Demo setup steps

## Demo setup using Power BI Desktop file

|  |  |
| --- | --- |
| Steps | Screenshot |
| 1. Download and Install Power BI Desktop from: <https://powerbi.microsoft.com/en-us/> |  |
| 1. Copy the demonstration Power BI file (**Sales Dashboard.pbix**) to a folder on your machine, e.g.  Documents\PowerBIDemos\Sales |  |
| 1. In your browser, navigate to <http://app.powerbi.com>. Sign in with your Power BI account. If you don’t have an account, you can sign up for a free trial account. |  |
| 1. Once you login into the Power BI Service you will see **My Workspace** selected by default and below that you will see **Dashboards, Reports** and **Datasets** as shown in the figure. |  |
| 1. Click the plus sign https://powerbi.uservoice.com/assets/79680000/PBI_PlusIcon.png next to the **Dashboards** heading. |  |
| 1. Type a name for your new dashboard e.g. **Sales Dashboard** |  |
| 1. In the Power BI navigation pane on the left, select **Get Data.** |  |
| 1. On the **Get Data** page, select the **Get** from **Files.** |  |
| 1. On the **Files** page, select **Local File** and browse to the folder where you copied the assets for this demo. |  |
| 1. Select the Power BI Desktop file **Sales Dashboard.pbix**, then select **Open**.You will see the upload status as shown in the figure.   Upload might take a few minutes based on bandwidth and network connectivity. |  |
| 1. Power BI adds the new dataset and report. Notice new items are marked with a yellow asterisk https://powerbi.uservoice.com/assets/82845592/PBI_YellowAsteriskSm.png |  |
| 1. Click on the icon of the report you uploaded. |  |
| 1. From **Pipeline** **Report** page, select the **Actual vs. target revenue ($)** card visual or hover over or select the card visual and you will see a pin icon. 2. Click on the pin icon of the card visual showing **Actual vs. target revenue ($).** |  |
| 1. In **Pin to Dashboard** dialog, choose **Existing dashboard**, then select the dashboard created above. Then click on pin button. 2. This pins the visual to the dashboard from which you launched the report.   Note: repeat step 13-16 to Pin other visualizations to the dashboard. |  |
| 1. The pin icon appears for each visual and you can choose to pin the visual to the dashboard. 2. In addition to the gauge chart, pin these additional 4 visuals (as highlighted in the figure):    * **Opportunity value by pipeline phase**    * **Opportunity value by product category**    * **Opportunity value by account type**    * **Opportunity expected to close vs. target this month** |  |
| 1. Switch to the **Sales Performance** report page using the tabs at the bottom of the page (highlighted in figure). 2. Pin the following visuals:    * **Actual margin**    * **Target Margin**    * **Variance to target sales**    * **Planned v actual category mix**    * **Discount by category** |  |
| 1. Switch to the **Quota** report page using the tabs at the bottom of the page. 2. Pin these visuals to the Sales Dashboard:    * **Countries not meeting quota**    * **Average quota ($)**    * **Average Sales ($)** |  |
| 1. Switch to the **Trends** report page. 2. Pin these 4 visuals to the Sales Dashboard:    * **Weeks to close**    * **Revenue by month (current year vs. last year)**    * **Top accounts by YTD revenue for FY15**    * **Target revenue, actual revenue by country and account owner** |  |
| 1. Click on the **Power BI** or on the **Sales Dashboard** to get to the dashboard. 2. Resize and arrange the tiles on the dashboard as shown in the figure.   You have successfully created a dashboard. |  |

## 

## Demo setup using Organizational Content Pack

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| --- | --- |
| Steps | Screenshot |
| 1. Sign in to <https://msit.powerbi.com> with your @microsoft.com account. |  |
| 1. If you are in your workspace, select **Get Data** at the bottom of the left navigation pane. |  |
| 1. On the Get Data page, select the **Get** from **My Organization**. |  |
| 1. Select **Sales Dashboard** from the My Organization section of the Content Pack Library. 2. Select **Connect** to add the content pack to your active workspace. New reports and datasets are listed with a yellow asterisk. |  |

## Demo setup for Mobile

(Note: This illustrates the iPhone setup; Android phone uses a very similar process.)

Prerequisite: Demo setup using Power BI Desktop file or Demo setup using Organizational Content Pack.

|  |  |
| --- | --- |
| Demo Step | Screenshot |
| 1. Go to **App Store** on your iPhone. 2. Search for **Power BI**, GET and INSTALL the Power BI app. 3. Once installed open Power BI app. | C:\Users\Shashank\AppData\Local\Microsoft\Windows\INetCache\Content.Word\IMG_5875.png |
| 1. Once app opens tap on **Sign In**. 2. **Sign In** with you organizational account used in the sections above. | C:\Users\Shashank\AppData\Local\Microsoft\Windows\INetCache\Content.Word\IMG_5876.png |
| 1. After signing in, you will see **My Workspace** and a list of dashboards linked to your organizational account.   You have completed the Mobile setup. |  |