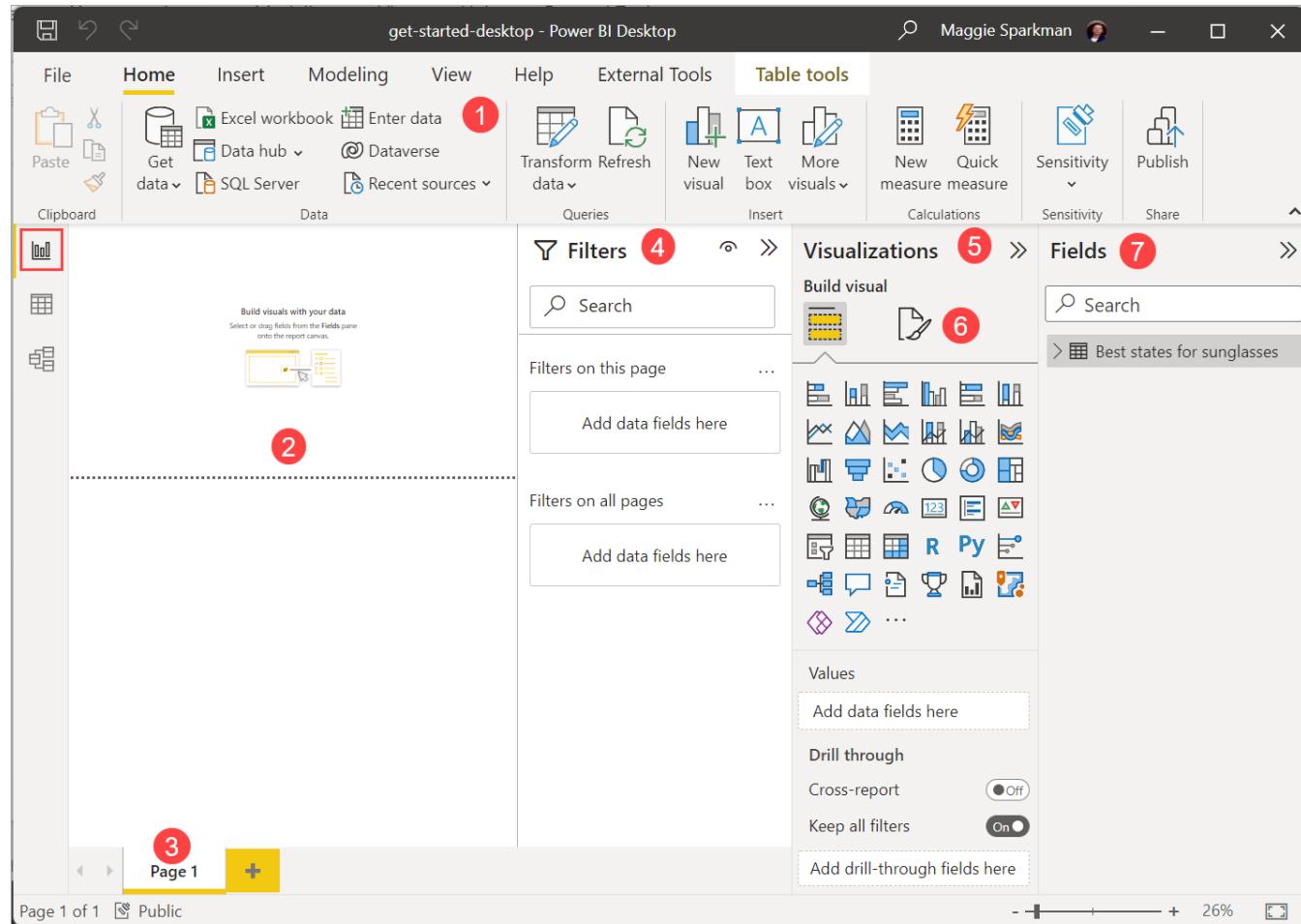


# Power BI

## Revenue Opportunity Demo Report

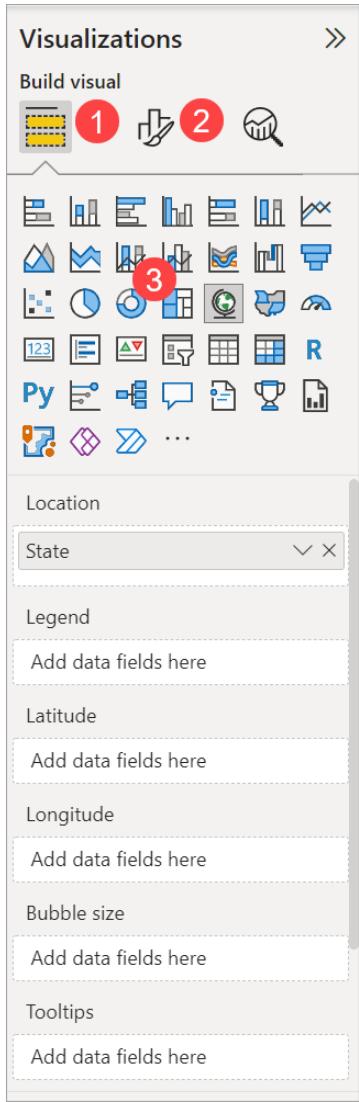


# Power BI Desktop Overview

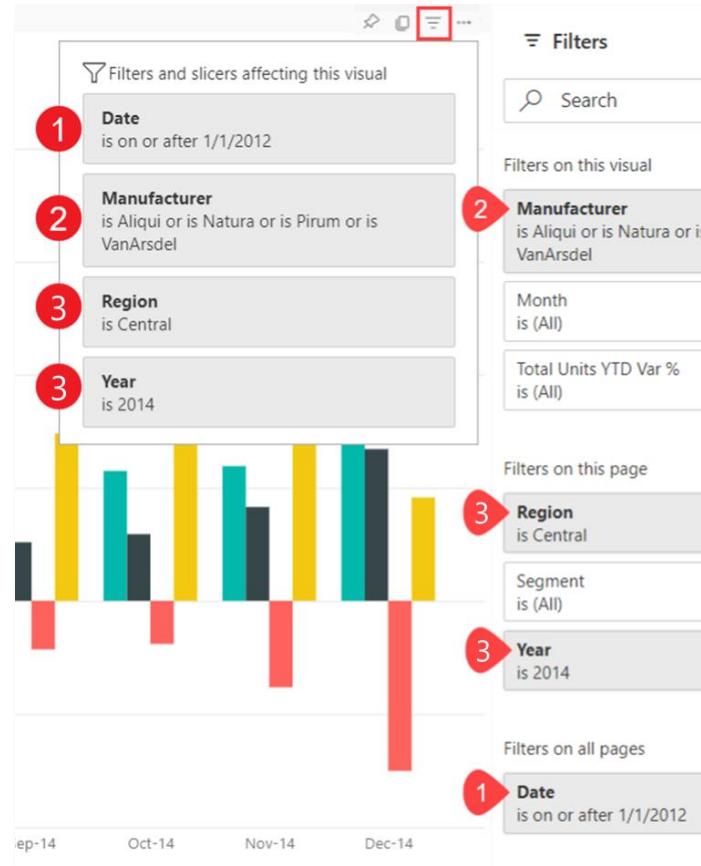


1. The ribbon at the top, which displays common tasks associated with reports and visualizations.
2. The canvas area in the middle, where you create and arrange visualizations.
3. The pages tab area at the bottom, which lets you select or add report pages.
4. The Filters pane, where you can filter data visualizations.
5. The Visualizations pane, where you can add, change, or customize visualizations, and apply drillthrough.
6. The Format pane, where you design the report and visualizations.
7. The Fields pane, which shows the available fields in your queries. You can drag these fields onto the canvas, the Filters pane, or the Visualizations pane to create or modify visualizations.

# Power BI Desktop – Visualization & Filter Pane

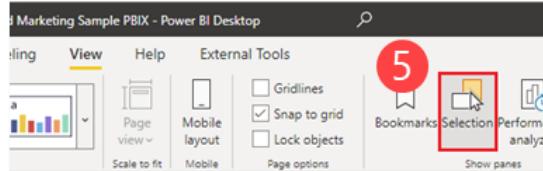
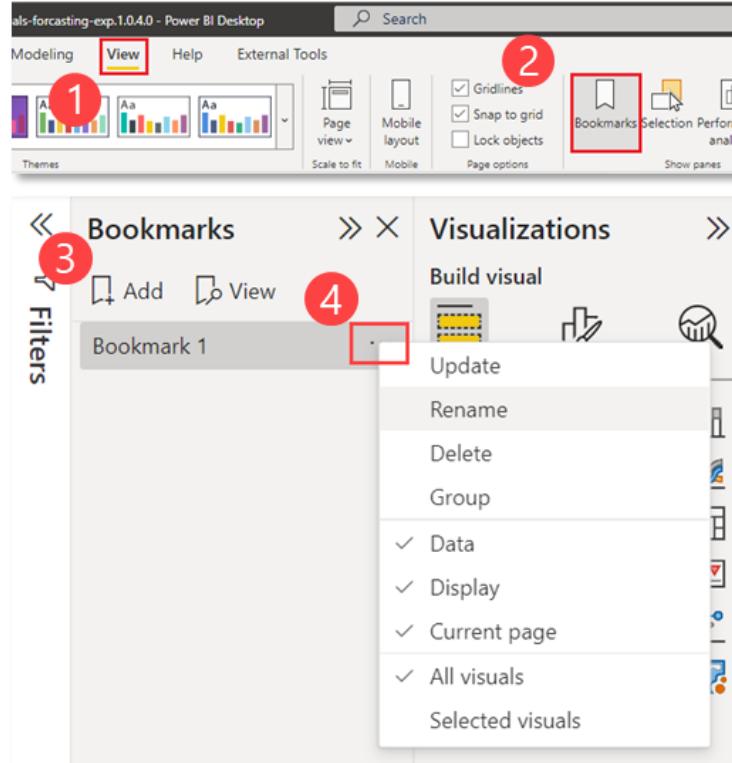


1. The Fields option in the Visualization pane lets you drag data fields to Legend and other field wells in the pane.
2. The Format option lets you apply formatting and other controls to visualizations.
3. The icons show the type of visualization created. You can change the type of a selected visualization by selecting a different icon, or create a new visualization by selecting an icon with no existing visualization selected.



1. In the Filter pane, Filtering on all pages applies filters across entire report
2. Filtering on this page applies filters to all data presented on this page of the report
3. Filters on this visual only affect individual visuals

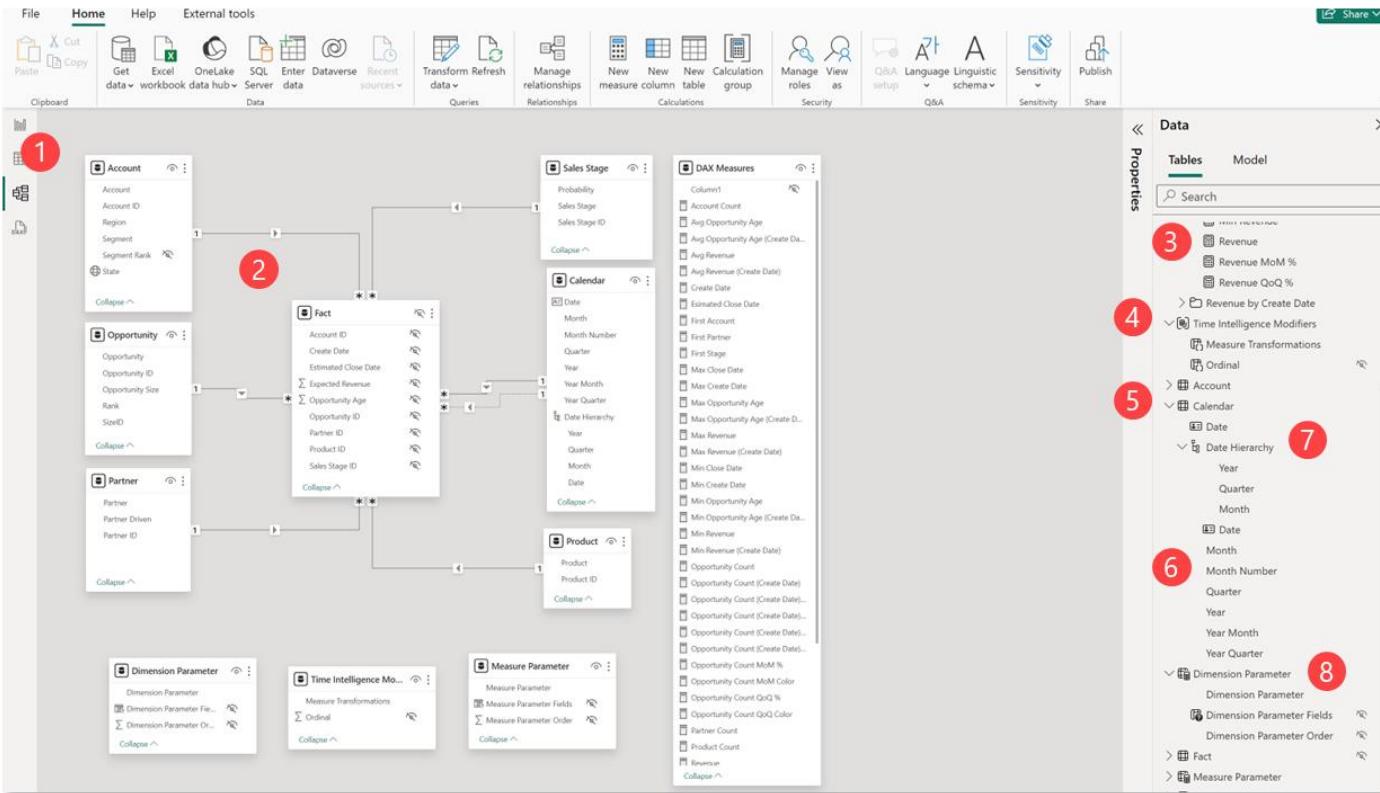
# Power BI Desktop – Bookmark & Selection Pane



1. Additional editing panes are found under View in the top ribbon
2. Bookmarks opens the Bookmarks pane – allowing you to manage saved states of the report, including visual visibility, data filtering, and active page
3. Here you can add new bookmarks and navigate between bookmarks
4. The ellipses allows you to select affected report state types and update the bookmark
5. Selections opens the Selections pane – allowing you to keep track of all visuals on your canvas
6. Here you can selectively hide and unhide visuals on your canvas

[Create report bookmarks in Power BI to share insights and build stories - Power BI | Microsoft Learn](#)

# Power BI Desktop – Data Model



[Use Model view in Power BI Desktop - Power BI | Microsoft Learn](#)

[Model relationships in Power BI Desktop - Power BI | Microsoft Learn](#)

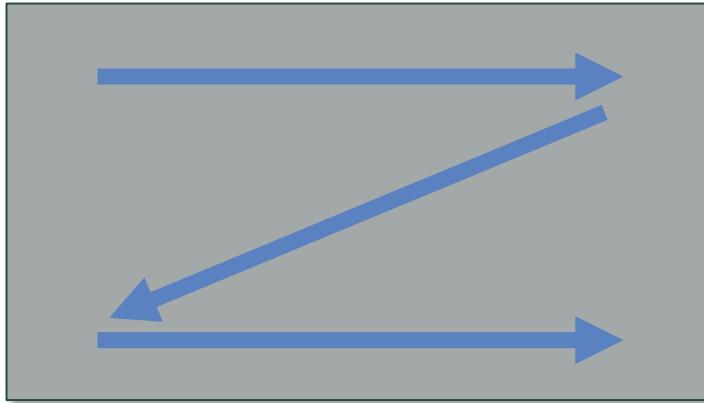
[Measures in Power BI Desktop - Power BI | Microsoft Learn](#)

[Create calculation groups in Power BI \(preview\) - Power BI | Microsoft Learn](#)

1. Model View – review data model
2. Relationship diagram – understand how queries relate to, and impact, one another
3. Measure – DAX calculation
4. Calculation group – modify a measure with another measure
5. Table – Individual query within semantic model
6. Column – Grouping of related data within a table
7. Hierarchy – Grouping of columns with a nested relationship
8. Field Parameter – Abstraction of column metadata as individual rows of data

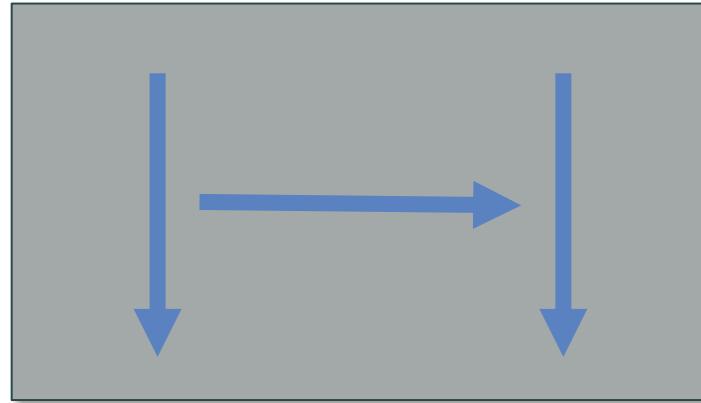
[Let report readers use field parameters to change visuals \(preview\) - Power BI | Microsoft Learn](#)

# Basic Visual Layout Patterns



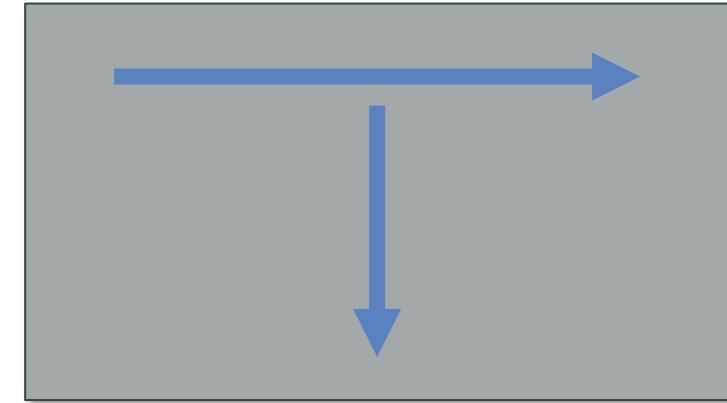
## Z Layout

"Scan the Page"



## H Layout

"Give me the summary  
then explain further"



## T Layout

"Set context then give me  
the details"

# Basic Page\* Splits



M

A

D

## M – Monitor Metrics

- KPI overview
- “Executive level”

## A – Analyze Anomalies

- Multi-dimensional analysis
- “Business level”

## D – Drill to Detail

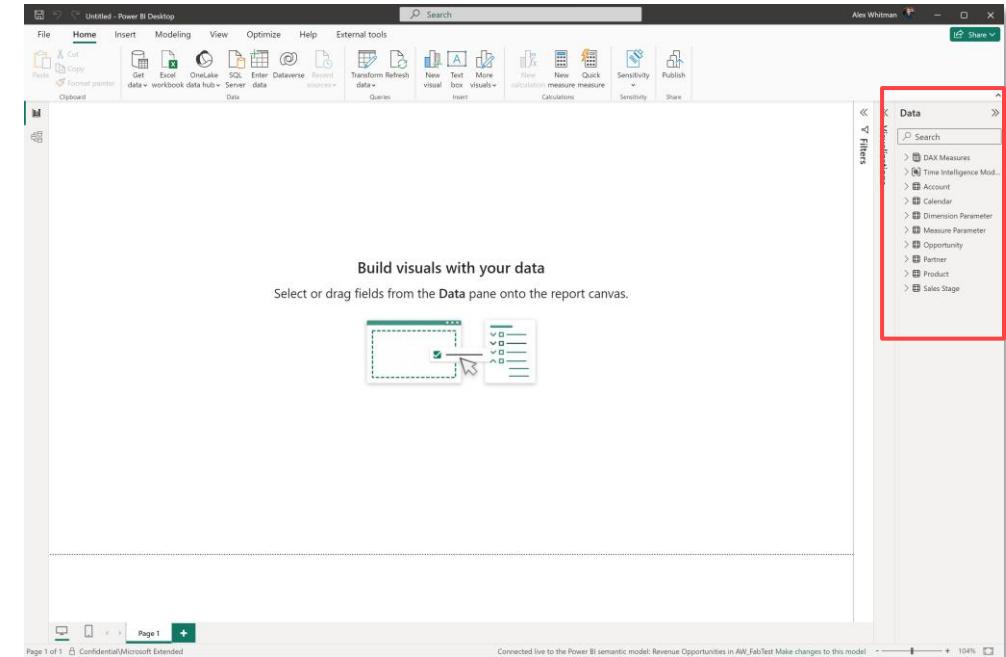
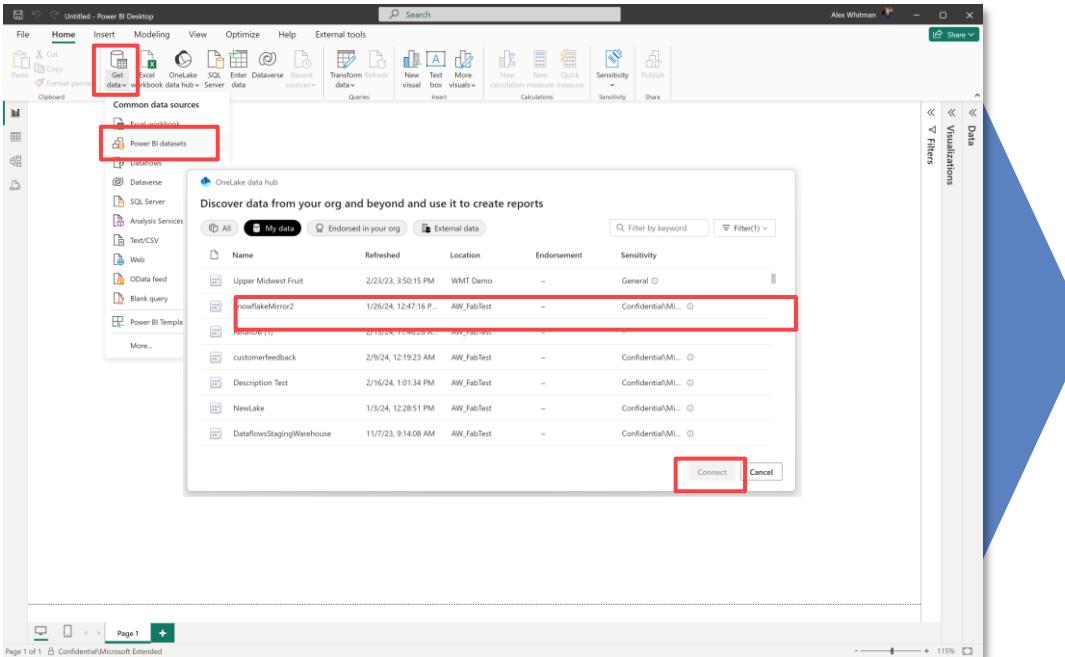
- Ad-hoc granularity
- “Analyst level”

\*Depending on data complexity each page could be a separate report, each with its own subset of this pattern

# Step 0 – Connect to Data



Revenue Opportunities 00 - Start.pbix



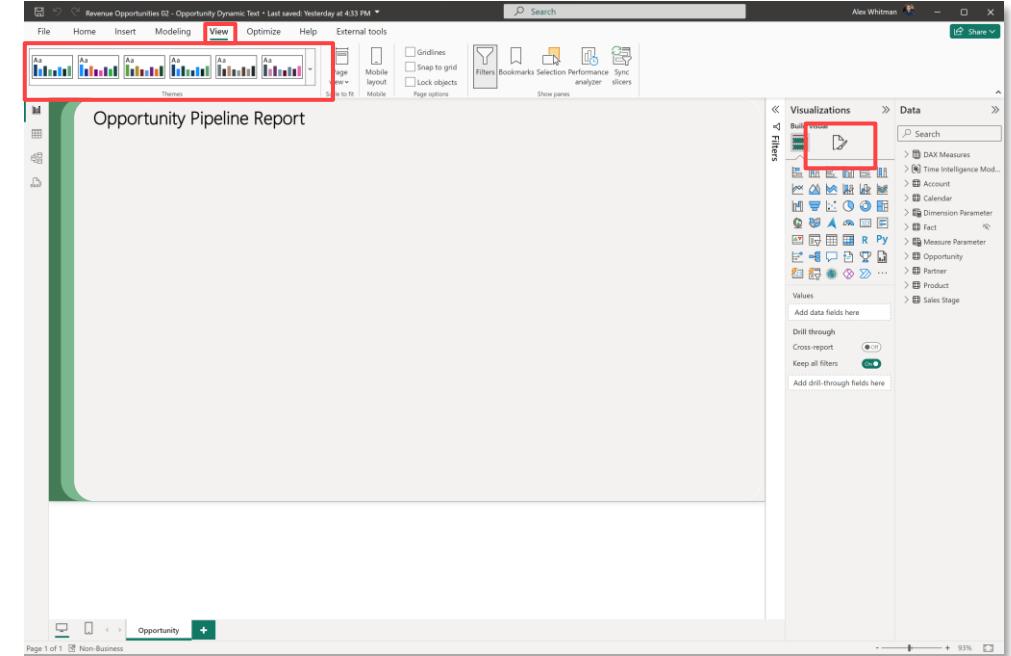
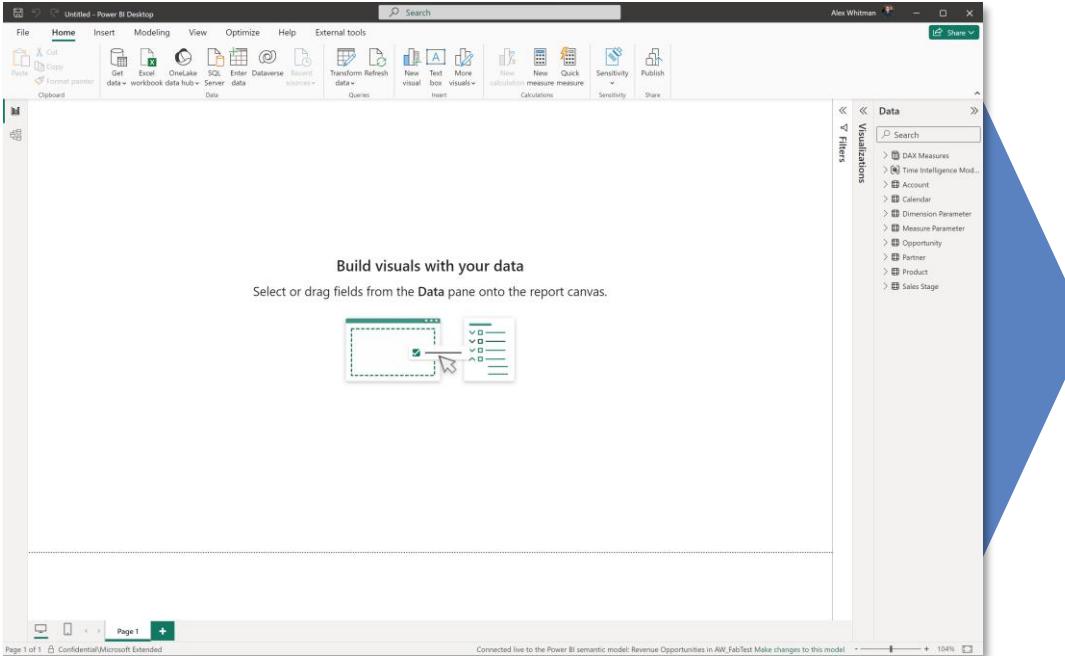
1. Home tab on ribbon
2. Get Data -> Power BI Dataset
3. Select “Revenue Opportunities” Semantic Model
4. Connect

[Connect to semantic models in the Power BI service from Power BI Desktop - Power BI | Microsoft Learn](#)

# Step 1 – Create Opportunity Page



Revenue Opportunities 01 - Opportunity Create.pbix



1. Rename Page 1 -> Opportunity
2. Change theme -> Accessible Tidal
3. Set temporary canvas background
4. Add green rounded rectangle shape
5. Add grey rounded rectangle shape
6. Add grey regular rectangle shape
7. Add text box

## Canvas Background

- Transparency -> 0%
- Color -> #437B56

## Green Rectangle

- Size -> 719 x 1228
- Position -> 0 x 21
- Corner Radius -> 5%
- Fill -> #7AB68E
- Transparency -> 0%
- Background -> Off

## Grey Rounded Rectangle

- Copy / Past Green Rectangle
- Position -> 0 x 45
- Fill -> #F3F2F1

## Grey Regular Rectangle

- Size -> 719 x 148
- Position -> 0 x 1131
- Fill -> ##F3F2F1
- Transparency -> 0%
- Background -> Off

## Text Box

- Size -> 65 x 412
- Position -> 7 x 75
- Font -> Segoe UI Light – Bold
- Font Size -> 24
- Text ->  
"Opportunity Pipeline Report"
- Background -> Off

- [Use report themes in Power BI Desktop - Power BI | Microsoft Learn](#)
- [Add text boxes, shapes, and smart narrative visuals to Power BI reports - Power BI | Microsoft Learn](#)

# Step 2 – Dynamic Text Box



Revenue Opportunities 02 - Opportunity Dynamic Text.pbix

The screenshot shows the Power BI desktop interface. The ribbon at the top has tabs like File, Home, Insert, Modeling, View, Optimize, Help, and External tools. The 'Insert' tab is selected, and its dropdown menu is open, showing options like Text, Buttons, Shapes, Image box, and More elements. A red box highlights this menu. Below the ribbon is the 'Visualizations' pane, which lists various chart types and data sources. The main workspace is titled 'Opportunity Pipeline Report'. At the bottom, there's a toolbar with icons for report, dashboard, and data.

The screenshot shows the 'Format text box' dialog box in the Power BI desktop. It has sections for 'General', 'Title', 'Effects', 'Header icons', and 'Alt text'. In the 'General' section, there's a text input field with the placeholder 'How would you calculate this value?' containing the text 'Max Create Date'. Below it is a 'Result' section with a date field set to '12/23/2022'. There's also a currency input field with a dropdown menu. At the bottom right of the dialog box is a 'Save' button, which is highlighted with a red box.

1. Add text box
2. Add prefix text
3. Add Value

## Text Box

- Size -> 46 x 252
- Position -> 15 x 991
- Font -> Segoe UI Light
- Font Size -> 16
- Text ->  
"Report Date: "
- Value
  - Measure -> [Max Create Date]
  - Name -> "Report Date"

- [Create smart narrative summaries - Power BI | Microsoft Learn](#)

# Step 3 – Filters



Revenue Opportunities 03 - Opportunity Filters.pbix

The screenshot shows the Power BI desktop interface with the 'Opportunity Pipeline Report' open. The ribbon at the top has the 'Data' tab selected. A large blue arrow points from this state to the right screenshot, indicating a progression. The 'Filters' pane is open on the right side of the screen, showing various filter options like 'Date', 'Sales Stage', and 'Sales Region'. A red box highlights the 'Filters' tab in the ribbon.

The screenshot shows the Power BI desktop interface with the 'Opportunity Pipeline Report' open. The ribbon at the top has the 'Data' tab selected. A large blue arrow points from the left screenshot to this one, indicating a progression. The 'Filters' pane is open on the right side of the screen, showing various filter options like 'Date', 'Sales Stage', and 'Sales Region'. A red box highlights the 'Filters' tab in the ribbon.

1. Expand filter pane and set to visible
2. Drag filter columns to filter pane

## Filter Pane

- Type -> Filter on all pages
- Visibility -> Unhidden

## ▪ Columns / Fields

- 'Calendar'[Date]
- 'Sales Stage'[Sales Stage]
- 'Partner'[Partner Driven]
- 'Partner'[Partner]
- 'Account'[Account Segment]
- 'Account'[Account State]
- 'Account'[Account]
- 'Product'[Product]
- 'Opportunity'[Opportunity Size]
- 'Opportunity'[Opportunity]

[Types of filters in Power BI reports - Power BI | Microsoft Learn](#)

# Step 4 – Buttons



Revenue Opportunities 04 - Opportunity Buttons.pbix

A screenshot of a Power BI report titled "Opportunity Pipeline Report". The ribbon at the top has a "Buttons" icon highlighted with a red box. The report content shows a visualization with various filters and data fields.

A screenshot of a Power BI report titled "Opportunity Pipeline Report". The ribbon at the top has a "Buttons" icon highlighted with a red box. A blue button labeled "Opportunity" is highlighted with a red box in the report content area.

1. Add page navigator button
2. Add Help button
3. Update Help button action
4. Add Web URL to Help button

## Page Navigator Button

- Size -> 39 x 907
- Position -> 223 x 668
- Background -> Off
- Shape -> Rectangle
- Rounded Corners -> 10 px
- Options ->  
"Show all by default"
- Font
  - Default -> Segoe UI Light – Bold
  - Selected -> Segoe UI – Bold
- Font Size -> 10
- Font Color -> #FFFFFF

- Glow Color -> #9FB1C5
- Glow Blur -> 10 px
- Fill Transparency -> 0%
- Fill Color
  - Default -> #9FB1C5
  - Hover -> #6F8BA8
  - Press -> #081F37
  - Selected -> #3F648B

## Help Button

- Size -> 39 x 44
- Position -> 15 x 1235
- Background -> Off
- Icon Type -> Help
- Color -> #000000
- Weight -> 3 px
- Horizontal Alignment -> Left
- Vertical Alignment -> Center
- Action -> Web URL
- Web URL ->  
"https://learn.microsoft.com/en-us/fabric/"

[Create buttons in Power BI reports - Power BI | Microsoft Learn](#)

# Step 5 – Revenue KPI Card



Revenue Opportunities 05 - Opportunity Rev Cards.pbix

The screenshot shows the Power BI desktop interface with the 'Opportunity Pipeline Report' page open. The report date is set to 12/23/2022. On the left, there's a visualizations pane with various chart and table icons. The main area displays a card with the value '\$1,968,250,939' and a subtitle 'Forecasted Revenue'. Below the card, there are three green bars representing different metrics: '175.1%', '94.5%', and 'QoQ 0%'. The bottom of the screen shows the Power BI ribbon and some navigation buttons.

This screenshot shows the same 'Opportunity Pipeline Report' page as the first one, but with several filter settings highlighted by red boxes. In the 'Filters' pane on the right, three sections are circled: 'Forecasted Revenue is (All)', 'DAX Measures', and 'Revenue by Close Date'. These sections contain various DAX measure definitions. The 'DAX Measures' section includes measures like Avg Revenue, Max Revenue, Min Revenue, and Revenue MoM %. The 'Revenue by Close Date' section includes measures like Revenue by Create Date, Revenue by Close Date, and Revenue by Close Date.

1. Add background shape
2. Add Rev multi-row card visual
3. Add MoM multi-row card visual
4. Add MoM conditional format
5. QoQ multi-row card visual
6. QoQ conditional format
7. Group all

- Rounded Rectangle**
- Size -> 203 x 300
  - Position -> 80 x 75
  - Corner Radius -> 15%
  - Fill -> #FFFFFF
  - Transparency -> 0%
  - Background -> Off

- Forecasted Revenue Card**
- Measure -> [Revenue]
  - Measure Alias -> "Forecasted Revenue"
  - Size -> 84 x 280
  - Position -> 80 x 94
  - Background -> Off
  - Value Font -> Segoe UI Bold
  - Value Font Size -> 24
  - Value Font Color -> #000000
  - Label Font -> Segoe UI Light - Bold
  - Label Font Size -> 12
  - Label Font Color -> #000000
  - Header Icons -> Off
  - Visual level filters -> Hidden
  - Header Icons -> Hidden

- MoM % Card**
- Copy / Paste Rev Card
  - Measure -> [Revenue MoM %]
  - Measure Alias -> "MoM %"
  - Size -> 58 x 134
  - Position -> 165 x 84
  - Value Font Size -> 12
  - Label Font -> Segoe UI Light
  - Accent Bar Width -> 5
  - Accent Bar Color -> [Revenue QoQ Color]
  - Visual level filters -> Hidden
  - Header Icons -> Hidden

- QoQ % Card**
- Copy / Paste MoM Card
  - Measure -> [Revenue QoQ %]
  - Measure Alias -> "QoQ %"
  - Size -> 222 x 84
  - Accent Bar Color -> [Revenue QoQ Color]
  - Visual level filters -> Hidden
  - Header Icons -> Hidden
- Group 1**
- Select 1 rectangle and 3 cards
  - Group all

- [Visualization types in Power BI - Power BI | Microsoft Learn](#)
- [Apply conditional table formatting in Power BI - Power BI | Microsoft Learn](#)
- [Group visuals in Power BI - Desktop reports - Power BI | Microsoft Learn](#)

# Step 6 – Opportunity KPI Card



Revenue Opportunities 06 - Opportunity Opp Card.pbix

The screenshot shows the 'Opportunity Pipeline Report' visual in Power BI. A rounded rectangle has been placed over the top section of the visual, which contains the 'Forecasted Revenue' (\$1,968,250,939) and 'MoM %' (175.1%). The visual also includes a green bar chart and a progress bar at the bottom.

The screenshot shows the 'Opportunity Pipeline Report' visual in Power BI. A rounded rectangle highlights the 'Opportunity Count' section, which displays the value '457'. The visual also includes a green bar chart and a progress bar at the bottom.

1. Copy / Paste revenue group visuals (#5)
2. Update primary measure and alias
3. Update MoM and QoQ measures and aliases
4. Update MoM and QoQ conditional formatting
5. Hide visual level filters

- Rounded Rectangle**
- Copy / Paste from #5
  - Position -> 80 x 424

- Forecasted Revenue Card**
- Copy / Paste from #5
  - Measure -> [Opportunity Count]
  - Measure Alias -> "Opportunity Count"
  - Position -> 80 x 438
  - Visual level filters -> Hidden
  - Header Icons -> Hidden

- MoM % Card**
- Copy / Paste from #5
  - Measure -> [Opportunity Count MoM %]
  - Measure Alias -> "MoM %"
  - Position -> 165 x 433
  - Accent Bar Color -> [Opportunity Count MoM Color]
  - Visual level filters -> Hidden
  - Header Icons -> Hidden

- QoQ % Card**
- Copy / Paste from #5
  - Measure -> [Opportunity Count QoQ %]
  - Measure Alias -> "QoQ %"
  - Position -> 222 x 433
  - Accent Bar Color -> [Opportunity Count QoQ Color]
  - Visual level filters -> Hidden
  - Header Icons -> Hidden

- [Visualization types in Power BI - Power BI | Microsoft Learn](#)
- [Apply conditional table formatting in Power BI - Power BI | Microsoft Learn](#)

# Step 7 – Line & Column Chart



Revenue Opportunities 07 - Opportunity Line Chart.pbix

This screenshot shows the Power BI desktop interface with the 'Opportunity Pipeline Report' visualization. The visualization displays two summary cards at the top: 'Forecasted Revenue' (\$1,968,250,939) and 'Opportunity Count' (457). Below these are two stacked bar charts. The left chart shows 'Opportunity Count' by 'Sales Stage' (MQL, SQL, Opportunity, Closed Won) for December 2022. The right chart shows 'Revenue' by 'Sales Stage' for December 2022. The report date is set to 12/23/2022. The data pane on the right is open, showing various filters applied to the visualizations, such as 'Opportunity Count is (All)', 'Date is (All)', and 'Sales Stage is (All)'.

This screenshot shows the same visualization after modifications. The 'Opportunity Count' card has been removed, leaving only the 'Forecasted Revenue' card. The stacked bar charts have also been removed, leaving only the line chart. The data pane on the right shows the filters remain the same as in the previous screenshot.

1. Add background shape
2. Add line & column chart

- Rounded Rectangle**
- Size -> 317 x 649
  - Position -> 324 x 75
  - Corner Radius -> 10%
  - Fill -> ##FFFFFF
  - Transparency -> 0%
  - Background -> Off

- Line & Clustered Column Chart**
- Size -> 301 x 632
  - Position -> 331 x 84
  - X-Axis -> 'Calendar'[Date Hierarchy]
  - Column Y-Axis -> [Opportunity Count]
  - Line Y-Axis -> "Opportunity Count"
  - Axis Values Font -> Segoe UI
  - Axis Values Font Size -> 9
  - Axis Values Font Color -> #000000
  - Axis Title Font -> Segoe UI Light - Bold
  - Axis Title Font Size -> 10
  - Axis Title Font Color -> #000000

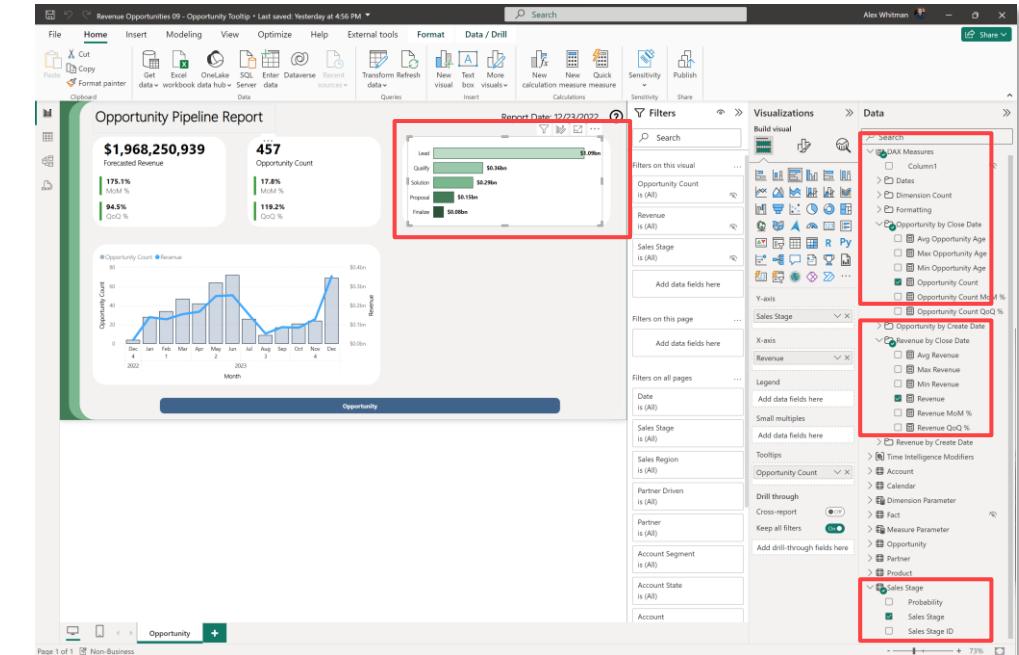
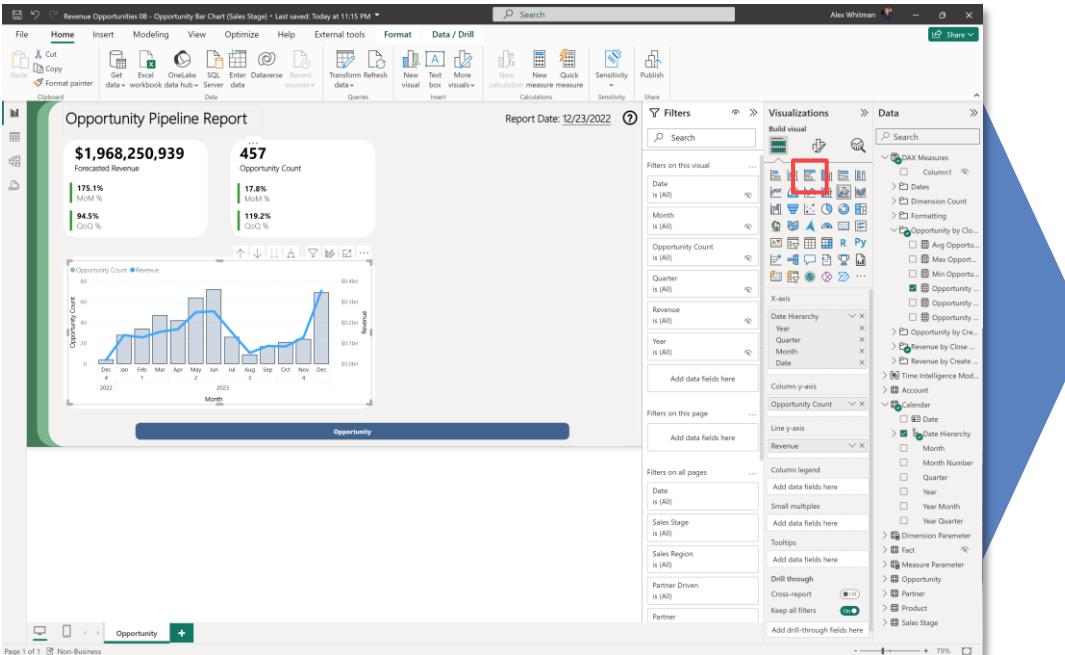
- Legend Font -> Segoe UI Light
- Legend Font Size -> 10
- Legend Font Color -> #000000
- Legend Position -> Top left
- Column Color -> #9FB1C5
- Column Transparency -> 50%
- Column Border Width -> 1 px
- Column Border Color -> #000000
- Column Layout Spacing -> 15%
- Line Width -> 5 px
- Line Color -> #3EA9FF
- Visual level filters -> Hidden
- Header Icons -> Visible

[Combo chart in Power BI - Power BI | Microsoft Learn](#)

# Step 8 – Sales Stage Bar Chart



Revenue Opportunities 08 - Opportunity Bar Chart (Sales Stage).pbix



1. Add background shape
2. Add bar chart
3. Add category specific color gradient

## Rounded Rectangle

- Size -> 203 x 470
- Position -> 79 x 773
- Corner Radius -> 15%
- Fill -> ##FFFFFF
- Transparency -> 0%
- Background -> Off

## Bar Chart

- Size -> 203 x 441
- Position -> 79 x 783
- X-Axis -> [Revenue]
- Y-Axis -> 'Sales Stage'[Sales Stage]
- Tooltip Type -> Default
- Tooltip -> [Opportunity Count]
- X-Axis -> Off
- Y-Axis Title -> Off
- Axis Values Font Size -> 9
- Axis Values Font Color -> #000000
- Axis Values Font -> Segoe UI Light - Bold

- Bar Border Width -> 1 px
- Bar Border Color -> #000000
- Bar Layout Spacing -> 20%
- Lead Bar Color -> #BDDBC7
- Quality Bar Color -> #9BC8AA
- Solution Bar Color -> #7AB68E
- Proposal Bar Color -> #437B56
- Finalize Bar Color -> #2D5239
- Label Position -> Outside End
- Label Field -> [Revenue]
- Label Font -> Segoe UI Bold
- Label Font Size -> 9
- Label Font Color -> #000000

- Visual level filters -> Hidden
- Header Icons -> Hidden

[Visualization types in Power BI - Power BI | Microsoft Learn](#)

# Step 9 – General Tooltip



Revenue Opportunities 09 - Opportunity General Tooltip Create.pbix

The screenshot shows the Power BI desktop interface with the 'Opportunity Pipeline Report' page selected. The ribbon at the top has 'General Tooltip' highlighted in blue. The report itself displays various KPI cards and a line chart. The 'Data' tab is open in the ribbon, and the 'Visualizations' pane on the left shows several visualizations including a bar chart and a line chart.

The screenshot shows the Power BI desktop interface with the 'Revenue Opportunities Bar Tooltip Line Chart' page selected. A red box highlights 'General Tooltip' in the ribbon. Another red box highlights the 'General Tooltip' settings in the 'Visualizations' pane on the right, which includes options like 'Allow use as tooltip' and 'Allow Q&A'. The report displays a bar chart and a line chart.

1. Add new page
2. Rename page to "General Tooltip"
3. Hide page
4. Convert to tooltip
5. Copy / Paste revenue group visuals (#5)
6. Copy / Paste Opportunity KPI Card visuals except rounded rectangle (#6)
7. Adjust formatting

## Rounded Rectangle

- Copy / Paste from #5
- Size -> 235 x 313
- Position -> 2 x 3

## Forecasted Revenue Card

- Copy / Paste from #5
- Size -> 52 x 160
- Position -> 5 x 8
- Value Font Size -> 14
- Label Font -> Segoe UI Light - Bold
- Label Font Size -> 8

## Rev MoM % Card

- Copy / Paste from #5
- Size -> 42 x 134
- Position -> 57 x 8
- Value Font Size -> 8
- Label Font Size -> 8

## Rev QoQ % Card

- Copy / Paste from #5
- Size -> 42 x 134
- Position -> 99 x 8
- Value Font Size -> 8
- Label Font Size -> 8

## Opportunity Count Card

- Copy / Paste from #6
- Size -> 52 x 134
- Position -> 5 x 174
- Value Font Size -> 14
- Label Font -> Segoe UI Light - Bold
- Label Font Size -> 8

## Opp MoM % Card

- Copy / Paste from #6
- Size -> 42 x 134
- Position -> 57 x 174
- Value Font Size -> 8
- Label Font Size -> 8

## Opp QoQ % Card

- Copy / Paste from #6
- Size -> 42 x 134
- Position -> 99 x 174
- Value Font Size -> 8
- Label Font Size -> 8

- [Create report tooltip pages in Power BI - Power BI | Microsoft Learn](#)

# Step 10 – Tooltip Line Chart



Revenue Opportunities 10 - Opportunity Bar Tooltip Line Chart.pbix

The screenshot shows the Power BI Desktop interface with the 'General Tooltip' settings open. The visualization on the canvas displays a line chart with a tooltip showing 'Forecasted Revenue' (\$1,968,250,939) and 'Opportunity Count' (457). The tooltip also includes percentage growth values: 178.1%, 17.8%, 84.5%, and 119.2%. The 'Visualizations' pane on the right shows various chart types. The 'Data' pane shows fields like 'Forecasted Revenue', 'Opportunity Count', and time intelligence measures. The 'Fields' pane shows filters for 'General Tooltip'.

The screenshot shows the final configuration of the line chart in Power BI Desktop. The visualization now features a solid blue line representing revenue over time, with a dashed blue line above it representing the max line. The tooltip has been removed. Red boxes highlight several settings in the 'Fields' pane: 'Max Line Color' (#B3B3B3), 'Max Line Style' (Dashed), 'Max Line Position' (Behind), 'Max Line Label Position' (Left / Under), and 'Max Line Label Color' (#000000).

1. Add line chart visual
2. Add max line
3. Adjust formatting

## Line Chart

- Size -> 110 x 320
- Position -> 130 x 0
- X-Axis -> 'Calendar'[Date Hierarchy].[Year] & [Month]
- Y-Axis -> [Revenue]
- X-Axis Title -> Off
- Y-Axis Values -> Off
- Axis Values Font -> Segoe UI Light
- Axis Values Font Size -> 8
- Axis Values Font Color -> #000000
- Axis Title Font -> Segoe UI Light - Bold
- Axis Title Font Size -> 8
- Axis Title Font Color -> #000000

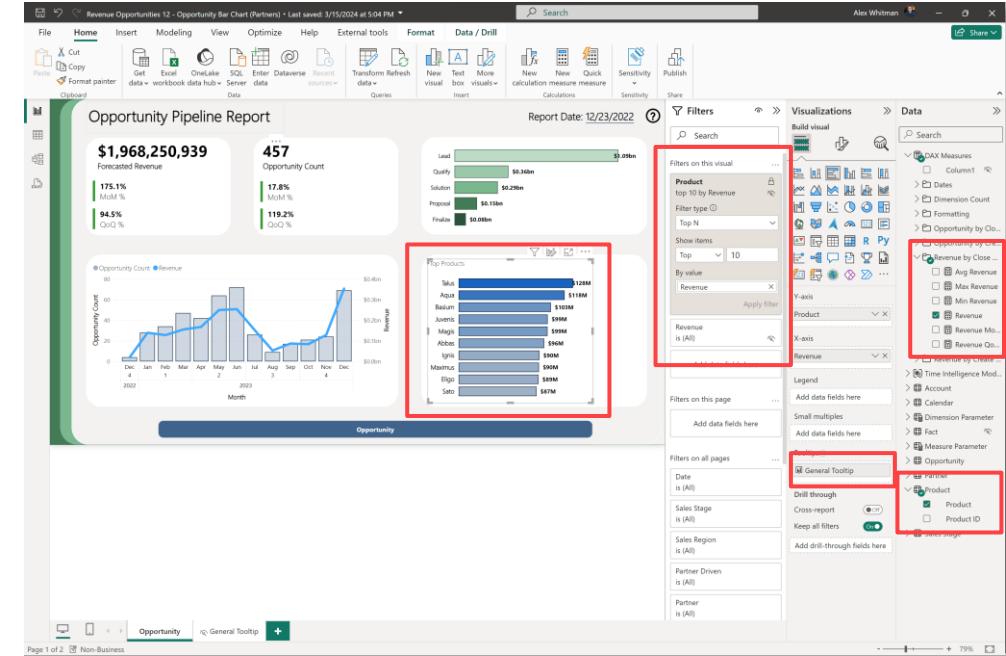
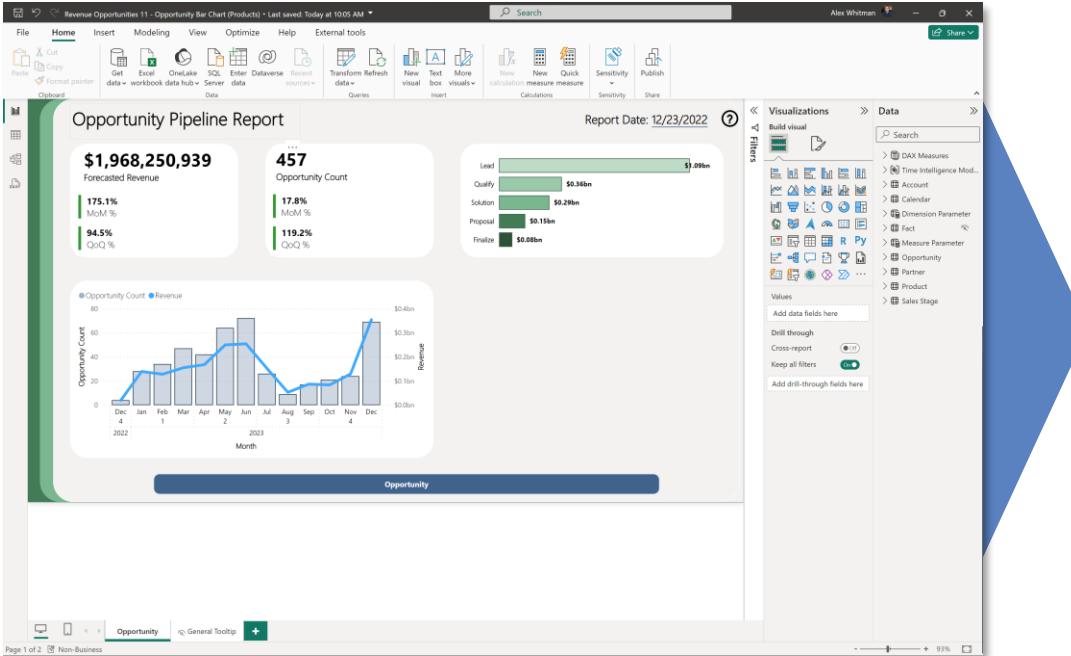
- Measure Line Width -> 3 px
- Measure Line Color -> #1F84FF
- Max Line Color -> #B3B3B3
- Max Line Style -> Dashed
- Max Line Position -> Behind
- Max Line Label Position -> Left / Under
- Max Line Label Color -> #000000
- Visual level filters -> Hidden
- Header Icons -> Hidden

[Use the Analytics pane in Power BI Desktop - Power BI | Microsoft Learn](#)

# Step 11 – Products Bar Chart



Revenue Opportunities 11 - Opportunity Bar Chart (Products).pbix



1. Copy / Paste bar chart and rounded rectangle from #8
2. Update measures
3. Add TopN filter
4. Add tooltip mapping
5. Adjust formatting

## Rounded Rectangle

- Size -> 317 x 470
- Position -> 324 x 773
- Corner Radius -> 10%

## Bar Chart

- Size -> 203 x 441
- Position -> 79 x 783
- X-Axis -> [Revenue]
- Y-Axis -> 'Product'[Product]
- Tooltip Type -> Page
- Tooltip -> [General Tooltip]
- Title -> "Top Products"
- Title Font -> Segoe UI Light
- Title Font Size -> 10
- Title Font Color -> #000000

- Bar Format Style -> Gradient
- Bar Format Field -> [Revenue]
- Lowest Value Color -> #9FB1C5
- Highest Value Color -> #1763BF
- Visual level filters -> Hidden
- Visual level filter type -> TopN (10)
- Visual level filter field -> 'Product'[Product]
- Visual level filter measure -> [Revenue]
- Header Icons -> Hidden

- [Types of filters in Power BI reports - Power BI | Microsoft Learn](#)
- [Apply conditional table formatting in Power BI - Power BI | Microsoft Learn](#)

# Step 12 – Partner Bar Chart



Revenue Opportunities 12 - Opportunity Bar Chart (Partners).pbix

This screenshot shows the Power BI interface with the report titled 'Revenue Opportunities 12 - Opportunity Bar Chart (Partners)'. The main visual is a bar chart titled 'Opportunity Pipeline Report' with a total forecasted revenue of \$1,968,250,939. The chart displays opportunity count and revenue by month from December 2021 to January 2022. A legend indicates four stages: Lead, Qualify, Solution, and Finalize. Below the chart is a table of top partners with their names and revenue. The Power BI ribbon is visible at the top, and the 'Filters' pane on the right shows various filters applied to the report.

This screenshot shows the Power BI interface with the report titled 'Revenue Opportunities 13 - Opportunity Bar Chart (Opportunities)'. The main visual is the same 'Opportunity Pipeline Report' as in the previous screenshot, but it has been modified. The bar chart now has a single blue bar representing the top 10 partners. The 'Filters' pane on the right is highlighted with red boxes around several sections: 'Visualizations', 'Selection', 'Visualizations', and 'Data'. These sections contain numerous filters related to 'Partner', 'Revenue', and 'Opportunity' measures, which have been applied to hide the first product bar chart and update the measures.

1. Copy / Paste bar chart from #11
2. Hide first product bar chart from #11
3. Update measures
4. Update filters

## Bar Chart

- Position -> 79 x 783
- Y-Axis -> 'Partner'[Partner]
- Title -> "Top Partners"
- Visual level filters -> Hidden
- Visual level filter 1 type -> TopN (10)
- Visual level filter 1 field -> 'Partner'[Partner]
- Visual level filter 1 measure -> [Revenue]
- Visual level filter 2 type -> Basic
- Visual level filter 2 field -> 'Partner'[Partner Driven]
- Visual level filter 2 values -> "Yes"
- Header Icons -> Hidden

- [Types of filters in Power BI reports - Power BI | Microsoft Learn](#)
- [Apply conditional table formatting in Power BI - Power BI | Microsoft Learn](#)

# Step 13 – Opportunity Tooltip



Revenue Opportunities 13 - Opportunity Opportunities Tooltip Create.pbix

- Duplicate general tooltip from #9
- Rename "Opportunity Tooltip"
- Delete all visuals new tooltip EXCEPT rounded rectangle
- Add multi-row card visual
- Adjust formatting

## Multi-Row Card

- Field 1 -> [Create Date]
- Field 2 -> [Estimated Close Date]
- Field 3 -> 'Sales Stage'[Sales Stage]
- Field 4 -> 'Product'[Product]
- Field 5 -> 'Account'[Account]
- Field 6 -> 'Partner'[Partner]
- Field 7 -> [Revenue]
- Field 7 Alias -> "Forecasted Revenue"
- Size -> 201 x 292
- Position -> 23 x 16

- Value Font -> Segoe UI Bold – Bold
- Value Font Size -> 10
- Value Font Color -> #000000
- Label Font -> Segoe UI Light - Bold
- Label Font Size -> 8
- Label Font Color -> #000000
- Visual level filters -> Hidden
- Header Icons -> Hidden

[Create report tooltip pages in Power BI - Power BI | Microsoft Learn](#)

# Step 14 – Opportunity Bar Chart



Revenue Opportunities 14 - Opportunity Bar Chart (Opportunities).pbix

1. Copy / Paste bar chart from #12
2. Hide first partner bar chart from #12
3. Update measures
4. Update filters

## Bar Chart

- Position -> 79 x 783
- Y-Axis -> 'Opportunity'[Opportunity]
- Tooltip Type -> Page
- Tooltip -> [Opportunity Tooltip]
- Title -> "Top Opportunities"
- Visual level filters -> Hidden
- Visual level filter type -> TopN (10)
- Visual level filter field -> 'Opportunity'[Opportunity]
- Visual level filter measure -> [Revenue]
- Header Icons -> Hidden

# Step 15 – Account Tooltip



Revenue Opportunities 15 - Opportunity Account Tooltip Create.pbix

- Duplicate general tooltip from #9
- Rename "Account Tooltip"
- Delete line chart visual
- Add table visual
- Adjust formatting

## Table

- Field 1 -> 'Account'[Segment]
- Field 2 -> 'Account'[Region]
- Field 3 -> 'Account'[State]
- Size -> 83 x 300
- Position -> 147 x 8
- Style Preset -> None
- Gridlines -> Off
- Grid Border Color -> #1F84FF
- Grid Border Width -> 2

- Value Font -> Segoe UI Light
- Value Font Size -> 10
- Value Font Color -> #000000
- Header Font -> Segoe UI Light - Bold
- Header Font Size -> 10
- Header Font Color -> #000000
- Visual level filters -> Hidden
- Header Icons -> Hidden

[Create report tooltip pages in Power BI - Power BI | Microsoft Learn](#)

# Step 16 – Account Bar Chart



Revenue Opportunities 16 - Opportunity Bar Chart (Account).pbix

1. Copy / Paste bar chart from #14
2. Hide first opportunity bar chart from #14
3. Update measures
4. Update filters

## Bar Chart

- Position -> 79 x 783
- Y-Axis -> 'Account'[Account]
- Tooltip Type -> Page
- Tooltip -> [Account Tooltip]
- Title -> "Top Accounts"
- Visual level filters -> Hidden
- Visual level filter type -> TopN (10)
- Visual level filter field -> 'Account'[Account]
- Visual level filter measure -> [Revenue]
- Header Icons -> Hidden

# Step 17 – Bookmarks



Revenue Opportunities 17 - Opportunity Bookmarks.pbix

This screenshot shows the Power BI desktop application. The main area displays a report titled "Opportunity Pipeline Report" with various charts and metrics. On the left, the "Filter pane" is open, showing a complex hierarchy of filters applied to the report. The filters include categories like "Opportunity", "Accounts", "Opportunities", "Partners", and "Products". The "Data" tab is selected in the Filter pane.

This screenshot shows the Power BI desktop application with the Filter pane moved to the right side of the interface. The report content remains the same as the previous screenshot. The Filter pane is now positioned on the right, showing the same hierarchical filter structure. The "Bookmarks" tab is selected in the Filter pane.

1. Collapse Filter Pane
2. Unhide Account Bar Chart
3. Hide Opportunities, Partner, & Product Bar Charts
4. Add "Accounts" bookmark
5. Update "Accounts" bookmark – removing check next to "Data"
6. Repeat 4-7 with "Opportunities", "Partners", and "Products" bookmarks respectively
7. Add bookmark navigator button
8. Format button

## Bookmarks

- Filter Pane -> Visible
- Filter Pane State -> Collapsed
- Data -> No
- Display -> Yes
- Current Page -> Yes
- All visuals -> Yes
- Selected visuals -> No

## Bookmark Navigator

- Size -> 145 x 87
- Position -> 408 x 1148
- Shape -> Rounded Rectangle
- Corner Radius -> 25%
- Font -> Segoe UI Light
- Font Size -> 10
- Font Color
  - Default -> #000000
  - Selected -> #FFFFFF

- Fill Transparency -> 0%
- Fill Color
  - Default -> #FFFFFF
  - Hover -> #E6E6E6
  - Press -> #808080
  - Selected -> #3F648B
- Header Icons -> Hidden

- [Create report bookmarks in Power BI to share insights and build stories - Power BI | Microsoft Learn](#)
- [Create page and bookmark navigators - Power BI | Microsoft Learn](#)

# Step 18 – Create Account Detail Page



Revenue Opportunities 18 - Account Detail Create.pbix

1. Duplicate Opportunity page
2. Rename new page to "Account Detail"
3. Remove all visual elements from Account Detail page, including hidden visuals, that came after Step #4
4. Update title text box to "Opportunity Pipeline Report – Account Detail"
5. Add 2 rounded rectangle shapes

## Text Box

- Size -> 65 x 649
- Text 1->  
"Opportunity Pipeline Report"
- Text 1 Font -> Segoe UI Light – Bold
- Text 1 Font Size -> 24
- Text 2 ->  
" – Account Detail"
- Text 2 Font -> Segoe UI Light
- Text 2 Font Size -> 20
- Background -> Off

## Rounded Rectangle 1

- Size -> 570 x 387
- Position -> 74 x 69
- Corner Radius -> 10%
- Fill -> ##FFFFFF
- Transparency -> 0%
- Background -> Off

## Rounded Rectangle 2

- Size -> 570 x 771
- Position -> 74 x 483
- Corner Radius -> 7%
- Fill -> ##FFFFFF
- Transparency -> 0%
- Background -> Off

# Step 19 – Slicers



Revenue Opportunities 19 - Account Detail Slicers.pbix

The screenshot shows the 'Opportunity Pipeline Report - Account Detail' page in Power BI desktop. The report displays two main sections: 'Opportunity' and 'Account Detail'. The 'Filters' pane on the right side contains a 'Build visual' section with various visualization options like DAX Measures, Time Intelligence, and Account. Below it is a 'Values' section with a dropdown menu for 'Account' and a date range selector for 'Partner Driven'.

This screenshot shows the same report after changes. The 'Account' and 'Partner Driven' slicers have been highlighted with a red box. The 'Filters' pane remains largely the same, but the visual representation of the report has changed to reflect the modifications made to the slicers.

1. Add "Account" drop down slicer
2. Copy / paste account drop down slicer
3. Update field and header text of copied slicer to "Partner Driven"
4. Add date between slicer
5. Format slicers

## Account Slicer

- Size -> 66 x 326
- Position -> 82 x 92
- Field -> 'Account'[Account]
- Background Transparency -> 0%
- Background Color -> #FFFFFF
- Style -> Dropdown
- Selection "Select All" -> On
- Header -> "Account"
- Header Font -> Segoe UI Semibold
- Header Font Size -> 10
- Header Font Color -> #000000
- Values Font -> Segoe UI
- Values Font Size -> 9
- Values Font Color -> #000000

- Search Enabled -> True
- Header Icons -> Hidden
- Visual level filters -> Hidden

## Partner Slicer

- Copy / Paste Account Slicer
- Size -> 66 x 220
  - Position -> 82 x 504
  - Field -> 'Partner'[Partner Driven]
  - Selection "Select All" -> Off
  - Header -> "Partner Driven"
  - Search Enabled -> False
  - Header Icons -> Hidden
  - Visual level filters -> Hidden

## Date Slicer

- Size -> 49 x 248
- Position -> 101 x 746
- Field -> 'Calendar'[Date]
- Background Transparency -> 0%
- Background Color -> #FFFFFF
- Style -> Between
- Slider -> Off
- Values Font -> Segoe UI Light - Bold
- Values Font Size -> 9
- Values Font Color -> #000000
- Header Icons -> Hidden
- Visual level filters -> Hidden

[Slicers in Power BI - Power BI | Microsoft Learn](#)

# Step 20 – KPI Card



Revenue Opportunities 20 - Account Detail Card.pbix

Opportunity Pipeline Report - Account Detail

Report Date: 12/23/2022

Account: All

Partner Driven: All

12/30/2021 12/29/2023

Opportunity Account Detail

**Forecasted Revenue:** \$1,968,250,939

**Opportunity Count:** 457

175.1% MoM %	17.8% MoM %
94.5% QoQ %	119.2% QoQ %

Opportunity Pipeline Report - Account Detail

Report Date: 12/23/2022

Account: All

Partner Driven: All

12/30/2021 12/29/2023

Opportunity Account Detail

Opportunity Pipeline Report - Account Detail

Report Date: 12/23/2022

Account: All

Partner Driven: All

12/30/2021 12/29/2023

Opportunity Account Detail

**Forecasted Revenue:** \$1,968,250,939

**Opportunity Count:** 457

175.1% MoM %	17.8% MoM %
94.5% QoQ %	119.2% QoQ %

Opportunity Pipeline Report - Account Detail

Report Date: 12/23/2022

Account: All

Partner Driven: All

12/30/2021 12/29/2023

Opportunity Account Detail

- Copy / Paste Revenue, Opportunity Count, and related MoM % & QoQ % visuals from [General Tooltip] (#9)
- Format visuals

## Forecasted Revenue Card

- Copy / Paste from #9
- Size -> 57 x 178
- Position -> 149 x 92
- Label Font Size -> 10

## Rev MoM % Card

- Copy / Paste from #9
- Size -> 47 x 150
- Position -> 206 x 92
- Value Font Size -> 9
- Label Font Size -> 9

## Rev QoQ % Card

- Copy / Paste from #9
- Size -> 47 x 150
- Position -> 253 x 92
- Value Font Size -> 9
- Label Font Size -> 9

## Opportunity Count Card

- Copy / Paste from #9
- Size -> 57 x 148
- Position -> 149 x 308
- Label Font Size -> 10

## Opp MoM % Card

- Copy / Paste from #9
- Size -> 47 x 148
- Position -> 206 x 308
- Value Font Size -> 9
- Label Font Size -> 9

## Opp QoQ % Card

- Copy / Paste from #9
- Size -> 47 x 148
- Position -> 253 x 308
- Value Font Size -> 9
- Label Font Size -> 9

# Step 21 – Percentage Bar Chart



Revenue Opportunities 21 - Account Detail Bar Chart.pbix

1. Add Opportunity 100% stacked bar chart
2. Format bar chart
3. Copy / Paste Opp bar chart
4. Remove visible legend from new bar chart
5. Update new bar chart measure to Revenue
6. Add text box

## Opportunity Bar Chart

- Size -> 106 x 254
- Position -> 350 x 163
- X-Axis -> [Opportunity Count]
- Legend -> 'Account'[Segment]
- Tooltip Type -> Default
- Tooltip -> [Account Count]
- X / Y Axis -> Off
- Y Axis Category Height -> 30 px
- Legend Position -> Bottom Center
- Legend Title -> Off
- Legend Font -> Segoe UI Light – Bold
- Legend Font Size -> 9
- Legend Font Color -> #000000

- Bar Border Width -> 1 px
- Bar Border Color -> #000000
- Bar Layout Spacing -> 0 %
- Strategic Bar Color -> #4C9DFF
- Large Bar Color -> #59A472
- S&M Bar Color -> #0F3D6E
- Label Position -> Inside Center
- Label Detail -> Pct of total
- Label Font -> Segoe UI
- Label Font Size -> 9
- Label Font Color -> #FFFFFF
- Visual level filters -> Hidden
- Header Icons -> Hidden

## Revenue Bar Chart

- Copy / Paste opp bar chart
- Size -> 78 x 254
- Position -> 300 x 163
- X-Axis -> [Revenue]
- Legend Position -> Off
- Visual level filters -> Hidden
- Header Icons -> Hidden

## Text Box

- Size -> 95 x 88
- Position -> 330 x 75
- Text ->
- “Revenue
- Opportunity
- Count”
- Font -> Segoe UI Light – Bold
- Font Size -> 10
- Font Color -> #000000
- Background -> Off

# Step 22 – Map



Revenue Opportunities 22 - Account Detail Map.pbix

1. Add filled map chart
2. Format map chart

## Filled Map Chart

- Size -> 146 x 326
- Position -> 476 x 92
- Location -> 'Account'[State]
- Legend -> 'Account'[Region]
- Tooltip Type -> Default
- Tooltip 1 -> [Account Count]
- Tooltip 2 -> [Revenue]
- Tooltip 3 -> [Opportunity Count]
- Map Style -> Grayscale

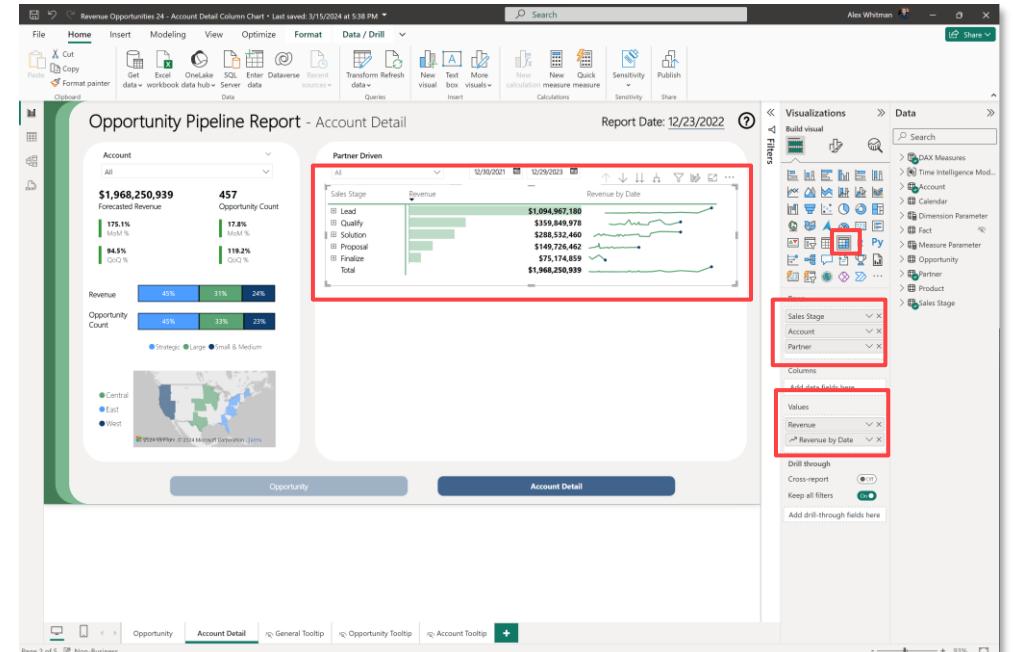
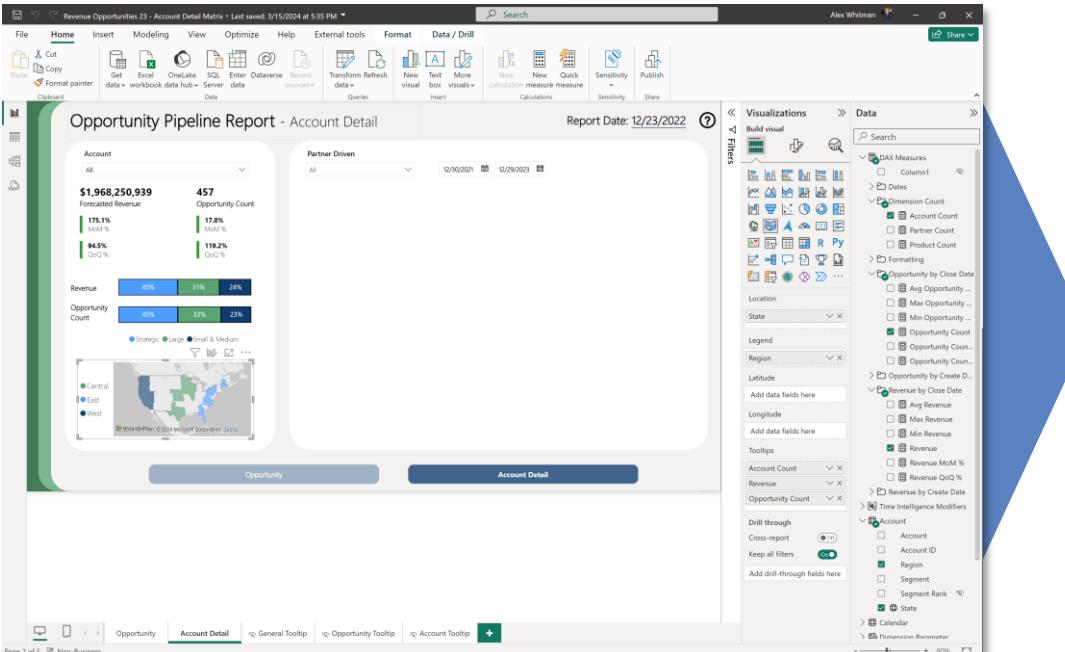
- Legend Position -> Center Left
- Legend Title -> Off
- Legend Font -> Segoe UI Light
- Legend Font Size -> 10
- Legend Font Color -> #000000
- Central Fill Color -> ##59A472
- East Fill Color -> #4C9dff
- West Fill Color -> #0F3D6E
- Visual level filters -> Hidden
- Header Icons -> Hidden

[Create and use filled maps \(choropleth maps\) in Power BI - Power BI | Microsoft Learn](#)

# Step 23 – Matrix



Revenue Opportunities 23 - Account Detail Matrix.pbix



1. Add matrix chart
2. Format visual
3. Add conditional formatting
4. Add sparklines

## Matrix

- Size -> 181 x 736
- Position -> 149 x 502
- Row 1 -> 'Sales Stage'[Sales Stage]
- Row 2 -> 'Account'[Account]
- Row 3 -> 'Partner'[Partner]
- Value -> [Revenue]
- Sparkline Series -> 'Calendar'[Date]
- Style Preset -> None
- Gridlines -> Off
- Grid Border Color -> #59A472
- Grid Border Width -> 2
- Value Font -> Segoe UI Bold
- Value Font Size -> 10
- Value Font Color -> #000000

- Column Header Font -> Segoe UI Light
- Column Header Font Size -> 10
- Column Header Font Color -> #000000
- Row Header Font -> Segoe UI Light – Bold
- Row Header Font Size -> 10
- Row Header Font Color -> #000000
- Column Subtotal -> Off
- Row Subtotal Font -> Segoe UI Bold – Bold
- Row Subtotal Font Size -> 10
- Row Subtotal Font Color -> #000000
- Data Bar Positive Value -> #BDDBC7
- Data Bar Negative Value -> #BDDBC7
- Data Bar Axis -> #437B56

- Sparkline Type -> Line
- Sparkline Color -> #59A472
- Sparkline Width -> 2
- Sparkline Marker -> Last
- Sparkline Marker Color -> #0F3D6E
- Sparkline Marker Type -> Dot
- Sparkline Marker Size -> 3
- Visual level filters -> Hidden
- Header Icons -> Hidden

- [Create a matrix visual in Power BI - Power BI | Microsoft Learn](#)
- [Create sparklines in a table or matrix in a report \(preview\) - Power BI | Microsoft Learn](#)

# Step 24 – Column Chart



Revenue Opportunities 24 - Account Detail Column Chart.pbix

1. Add column chart
2. Format visual
3. Add color gradient

## Column Chart

- Size -> 266 x 732
- Position -> 360 x 502
- X-Axis -> 'Product'[Product]
- Y-Axis -> [Revenue]
- Tooltip Type -> Page
- Tooltip -> [General Tooltip]
- Y-Axis -> Off
- X-Axis Title -> Off
- Axis Values Font Size -> 9
- Axis Values Font Color -> #000000
- Axis Values Font -> Segoe UI Light - Bold

- Bar Border Width -> 1 px
- Bar Border Color -> #000000
- Bar Layout Spacing -> 20%
- Bar Color Minimum -> #BDDBC7
- Bar Color Maximum -> #2D5239
- Label Position -> Outside End
- Label Field -> [Revenue]
- Label Font -> Segoe UI Bold
- Label Font Size -> 9
- Label Font Color -> #000000
- Visual level filters -> Hidden
- Header Icons -> Visible

# Step 25 – Create List View Page



Revenue Opportunities 25 - List View Create.pbix

1. Duplicate Opportunity page
2. Rename new page to "List View"
3. Remove all visual elements from List View page, including hidden visuals, that came after Step #4
4. Update title text box to "Opportunity Pipeline Report – List View"
5. Reorder pages:
  1. Opportunity
  2. Account Detail
  3. List View
  4. General Tooltip (hidden)
  5. Opportunity Tooltip (hidden)
  6. Account Tooltip (hidden)

## Text Box

- Size -> 65 x 649
- Text 1->  
"Opportunity Pipeline Report"
- Text 1 Font -> Segoe UI Light – Bold
- Text 1 Font Size -> 24
- Text 2 ->  
" – List View"
- Text 2 Font -> Segoe UI Light
- Text 2 Font Size -> 20
- Background -> Off

# Step 26 – List View Slicers



Revenue Opportunities 26 - List View Slicers.pbix

The screenshot shows the Power BI desktop application interface. The main area displays the 'Opportunity Pipeline Report - List View' report. On the right, the 'Available Dimensions' slicer is visible, which has been modified to have a size of 77x269 and a position of 72x65. The 'Field' dropdown is set to 'Dimension Parameter'. The title 'Available Dimensions' is displayed in bold Segoe UI font, and the font color is #000000. The background color is #FFFFFF, and the corner radius is 20px. The style is set to 'Dropdown'. The 'Available Measures' and 'Time Intelligence Modifier' slicers are also present but remain unmodified.

1. Add "Available Dimensions" drop down slicer
2. Copy / paste Available Dimensions drop down slicer twice
3. Update field and header text of first copied slicer to "Available Measures"
4. Update field and header text of first copied slicer to "Time Intelligence Modifier" and make single - select
5. Add date between slicer
6. Format slicers

## Available Dimensions Slicer

- Size -> 77 x 269
- Position -> 72 x 65
- Field -> 'Dimension Parameter' [Dimension Parameter]
- Title -> "Available Dimensions"
- Title Font -> Segoe UI Semibold
- Title Font Size -> 10
- Title Font Color -> #000000
- Background Color -> #FFFFFF
- Corner Radius -> 20 px
- Style -> Dropdown
- Values Font -> Segoe UI
- Values Font Size -> 9
- Values Font Color -> #000000

The screenshot shows the Power BI desktop application interface. The main area displays the 'Opportunity Pipeline Report - List View' report. The 'Available Dimensions' slicer has been modified according to the steps in the list. The 'Time Intelligence Modifier' slicer is also visible on the right.

## Time Intelligence Modifier

- Header Icons -> Hidden
- Visual level filters -> Hidden
- Style -> Between
- Slider -> Off
- Header Icons -> Hidden
- Visual level filters -> Hidden

## Date Slicer

- Position -> 72 x 990
- Field -> 'Calendar'[Date]
- Title -> "Dates"

- [Slicers in Power BI - Power BI | Microsoft Learn](#)
- [Let report readers use field parameters to change visuals \(preview\) - Power BI | Microsoft Learn](#)
- [Create calculation groups in Power BI \(preview\) - Power BI | Microsoft Learn](#)

# Step 27 – Table



Revenue Opportunities 27 - List View Table.pbix

Account	Opportunity	Product	Partner	Year	Month	Year	Quarter	Revenue	Revenue (Create Date)	Opportunities	Opportunities (Create Date)
alexco	Opportunity #443	Paratus	Sontacor	2023/2	2023/0	\$3,933,071				1	
Barnline	Opportunity #432	Aqua	Yearhouse	2023/2	2023/0	\$7,49,360				1	
Bartron	Opportunity #479	Batum	Direct	2023/2	2023/0	\$2,043,333				1	
Beckhoff	Opportunity #450	Cybernetics	Direct	2023/2	2023/0	\$4,466,666				1	
Bluemebab	Opportunity #227	Abbas	Sontacor	2023/2	2023/0	\$1,605,822				1	
CityCity	Opportunity #32	Vero	Free-electronics	2023/2	2023/04	\$3,216,251				1	
Diamondback	Opportunity #446	Lacuna	Quazzoo	2023/2	2023/04	\$8,357,065				1	
Dordogne	Opportunity #431	Veris	Direct	2023/2	2023/04	\$2,338,339				1	
Doubletechno	Opportunity #335	Vero	Karlman	2023/2	2023/04	\$5,812,922				1	
face-lab	Opportunity #386	Vero	Quadtex	2023/2	2023/04	\$7,695,672				1	
Funtax	Opportunity #276	Campana	Qudrion	2023/2	2023/04	\$7,327,182				1	
Godfrey	Opportunity #448	Paratus	Qudrion	2023/2	2023/04	\$7,327,182				1	
Goldstone	Opportunity #490	Paratus	It-technology	2023/2	2023/04	\$8,146,942				1	
Gold-fuse	Opportunity #463	Nirvana	It-technology	2023/2	2023/04	\$8,003,226				1	
Graveman	Opportunity #375	Abbas	It-technology	2023/2	2023/04	\$6,461,915				1	
Grocerycorporation	Opportunity #449	Paratus	Qudrion	2023/2	2023/04	\$1,541,724				1	
Hatty	Opportunity #449	Campana	Y-plex	2023/2	2023/04	\$397,544				1	
Iotech	Opportunity #406	Recole	Direct	2023/2	2023/04	\$61,254				1	
Indifx	Opportunity #932	Lacuna	Direct	2023/2	2023/04	\$65,592				1	
Infix	Opportunity #109	Talis	Sontacor	2023/2	2023/04	\$1,421,427				1	
Provencal	Opportunity #222	Sentient	Sontacor	2023/2	2023/04	\$7,071,479				1	
<b>Total</b>						<b>\$1,968,250,939</b>		<b>\$1,968,250,939</b>		<b>457</b>	<b>457</b>

1. Add table visual
2. Format visual

## Table

- Field 1 -> 'Dimension Parameter'[Dimension Parameter]
- Field 2 -> 'Measure Parameter'[Measure Parameter]
- Size -> 467 x 1194
- Position -> 170 x 65
- Style Preset -> None
- Horizontal Gridlines -> On
- Gridline Width -> 1
- Gridline Color -> #E5E0DA
- Grid Border Color -> #C6C2BE
- Grid Border Width -> 1
- Background Color -> #FFFFFF
- Corner Radius -> 30 px

- Value Font -> Segoe UI Light – Bold
- Value Font Size -> 10
- Value Font Color -> #000000
- Header Font -> Segoe UI – Bold
- Header Font Size -> 10
- Header Font Color -> #000000
- Total Font -> Segoe UI – Bold
- Total Font Size -> 10
- Total Font Color -> #000000
- Visual level filters -> Hidden
- Header Icons -> Visible

- [Let report readers use field parameters to change visuals \(preview\) - Power BI | Microsoft Learn](#)
- [Create calculation groups in Power BI \(preview\) - Power BI | Microsoft Learn](#)
- [Let users personalize visuals in a report - Power BI | Microsoft Learn](#)

# Step 28 – Consolidate Backgrounds



Revenue Opportunities 28 - Add Background.pbix

The screenshot shows the Power BI desktop interface with the 'Format page' pane open. The 'Visualizations' tab is selected. A red box highlights the 'Text box' section under the 'Shapes' category in the left sidebar.

The screenshot shows the Power BI desktop interface with the 'Format page' pane open. The 'Visualizations' tab is selected. A red box highlights the 'Opportunity Back...' button under the 'Background' section.

1. Hide all report visuals and buttons
2. Leave visible all static text boxes and shapes (ie rounded rectangles)
3. Take screen shot of each page
4. Crop to 720 x 1280 for main report pages
5. Crop to 240 x 320 for tooltip pages
6. Set background of each page to png screenshot equivalents
7. Delete unnecessary shapes and static visuals

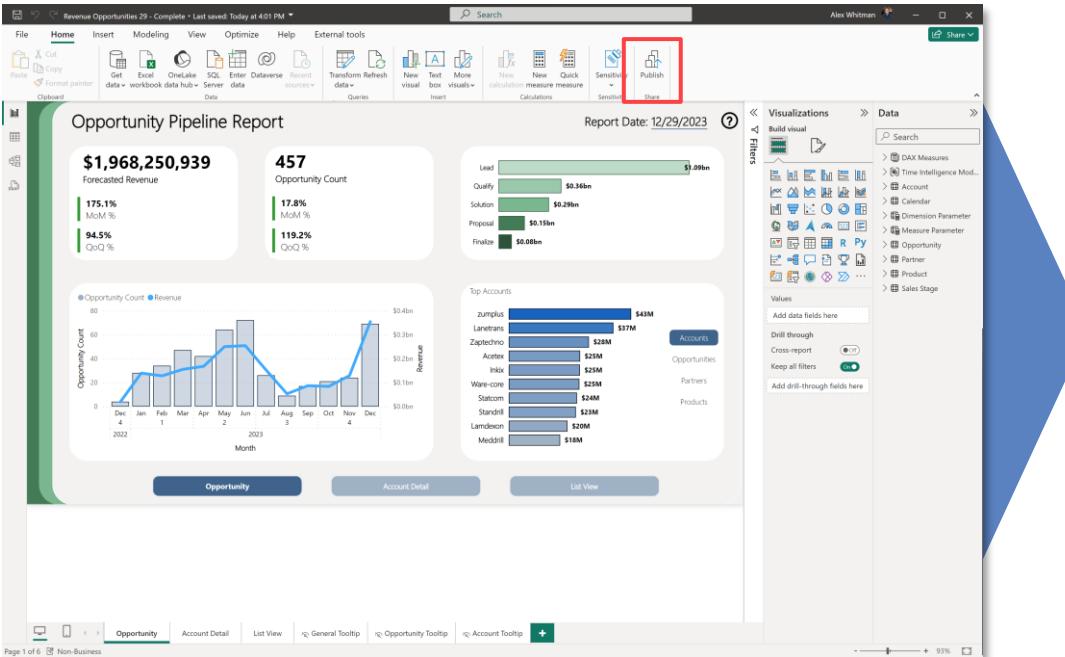
(See supplementary image folder for pre-built backgrounds)

- [Optimization guide for Power BI - Power BI | Microsoft Learn](#)

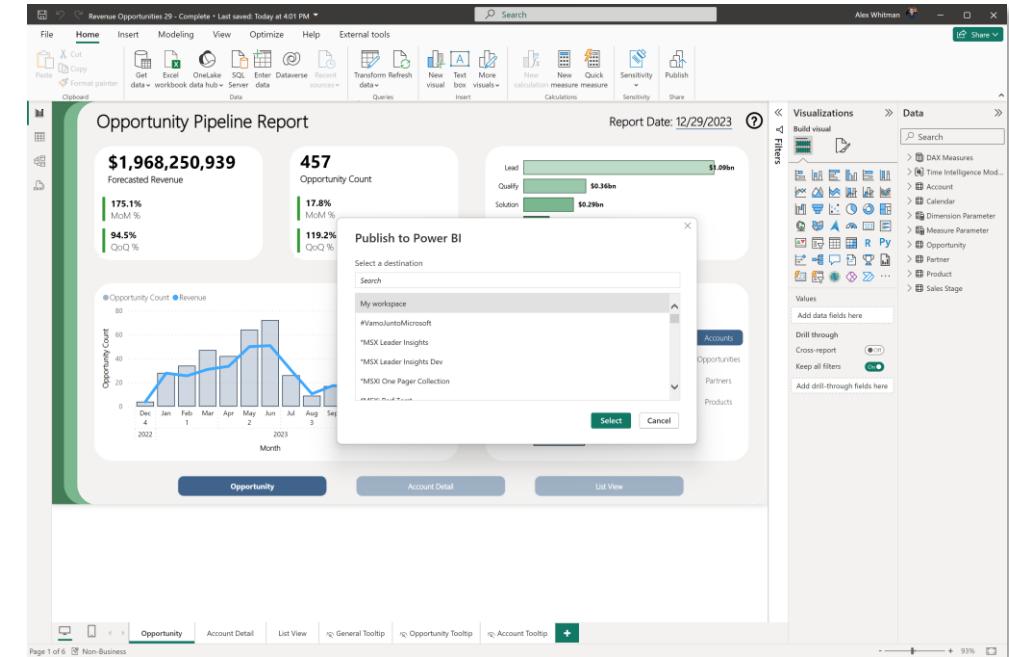
# Step 29 – Publish to Service



Revenue Opportunities 29 - Complete.pbix



The screenshot shows the Power BI desktop interface with the 'Opportunity Pipeline Report' dashboard open. The ribbon at the top has the 'Home' tab selected. The 'Publish' button, located in the top right corner of the ribbon, is highlighted with a red box. The dashboard itself displays various metrics and charts related to opportunity pipeline management.

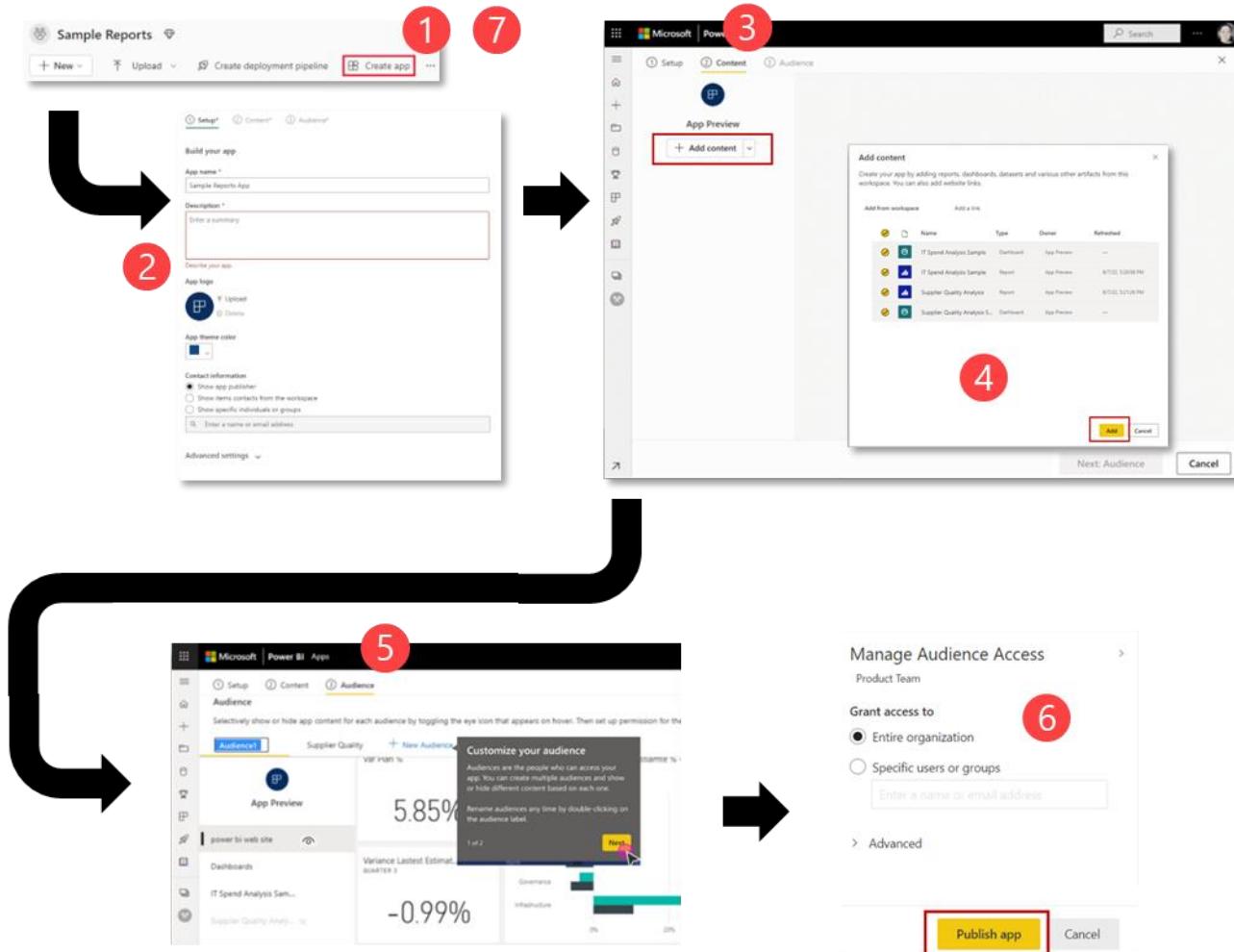


The screenshot shows the same 'Opportunity Pipeline Report' dashboard as the first one, but with a 'Publish to Power BI' dialog box overlaid. The dialog box contains a search bar and a list of workspaces, with 'My workspace' selected. The 'Select' button is visible at the bottom right of the dialog.

1. Select “Publish” from home ribbon
2. Navigate to desired workspace
3. Select and wait for publishing to complete

- [Optimization guide for Power BI - Power BI | Microsoft Learn](#)

# Step 30 Create / Update App



1. "Create App" from workspace in Power BI Service
2. Define app attributes, including: Name, Description, Thumbnail, theme color, and more
3. Navigate to content tab
4. Add content from the workspace to include in your app
5. Navigate to audience tab
6. Add users to view entire app or select reports within the app. After, publish app into production. It's recommended to use security groups to manage app access
7. After app is published, "Create App" will be replaced by "Update App." App will need to be updated after any visual changes or additions are made to existing reports or new reports are added

[Publish an app in Power BI - Power BI | Microsoft Learn](#)

# Helpful links

## Report Authoring

- [Tutorial: From dimensional model to stunning report in Power BI Desktop - Power BI | Microsoft Learn](#)
- [Use report themes in Power BI Desktop - Power BI | Microsoft Learn](#)
- [Visualization types in Power BI - Power BI | Microsoft Learn](#)
- [Customize the Visualization pane in Power BI Desktop and the Power BI service - Power BI | Microsoft Learn](#)
- [Publish an app in Power BI - Power BI | Microsoft Learn](#)

## Teams Integration

- [Add the Power BI app to Microsoft Teams - Power BI | Microsoft Learn](#)
- [Embed Power BI reports in Microsoft Teams - Power BI | Microsoft Learn](#)
- [Chat in Microsoft Teams directly from the Power BI service - Power BI | Microsoft Learn](#)

## Self-Paced Learning Paths

- [Get started with Power BI - Training | Microsoft Learn](#)
- [Microsoft Certified: Power BI Data Analyst Associate - Certifications | Microsoft Learn](#)
- [Study guide for Exam PL-300: Microsoft Power BI Data Analyst | Microsoft Learn](#)

## Reference Docs

- [Power BI documentation - Power BI | Microsoft Learn](#)
- [Data Analysis Expressions \(DAX\) Reference - DAX | Microsoft Learn](#)
- [Power Query M formula language reference - PowerQuery M | Microsoft Learn](#)

## Video Channels

- [Guy in a Cube – YouTube](#)
- [Microsoft Power BI – YouTube](#)
- [SQLBI – YouTube](#)

## Blogs

- [Business Intelligence | Elegant BI](#)
- [Chris Webb's BI Blog \(crossjoin.co.uk\)](#)
- [BI Polar – Business Intelligence, Data Governance, Mental Health, Diversity, Martial Arts, and Heavy Metal. \(ssbpolar.com\)](#)

## 3rd Party Tools

- [DAX Studio | DAX Studio](#)
- [Tabular Editor 2.x | TabularEditor](#)
- [Home Page - ALM Toolkit \(alm-toolkit.com\)](#)