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# How to Refresh Power BI Data in Dynamics 365 Finance & Operations

January 7th, 2025



By [Justin Song](#), Senior BI Analyst

Dynamics 365 Finance & Operations provides out-of-the-box embedded Power BI reports for your analytics with F&O data. However, a problem sometimes crops up with missing data that won't reappear when you refresh normally.

As a senior BI analyst who often works with Encore's Finance & Operations team, I handle complex Power BI projects for our Dynamics 365 clients. However, this refresh problem is one of the simpler issues I've seen, and you can probably tackle it on your own by following the instructions below.

Product Attributes and Categories in D365 F&O

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## Table of Contents

- What the Power BI Refresh Problem Looks Like
- How It Works
- How to Refresh Your F&O Data in Power BI
- Further Troubleshooting with Power BI in F&O

*Note: Even though most customers, commentators, and consultants still call it Dynamics 365 Finance & Operations or D365FO, Microsoft now technically licenses it as Dynamics 365 Finance and Supply Chain Management.*

# What the Power BI Refresh Problem Looks Like

You'll notice this problem if:

- You're using the out-of-the-box embedded Power BI reports in Finance & Operations.
- You found that Power BI is not displaying all the data.
- You tried to refresh it by clicking the "Refresh" button and clearing all the filters, but that didn't work.

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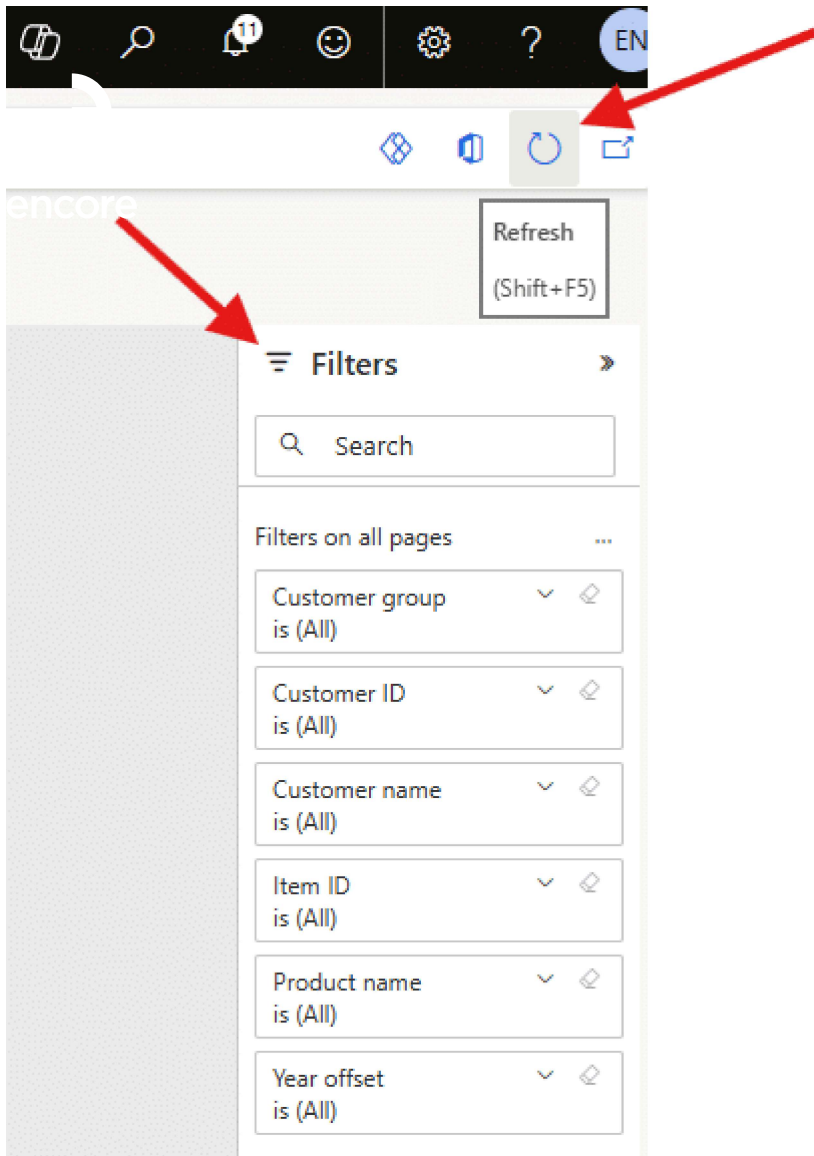
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If that's the problem you're facing, we have a solution for you.

## How It Works

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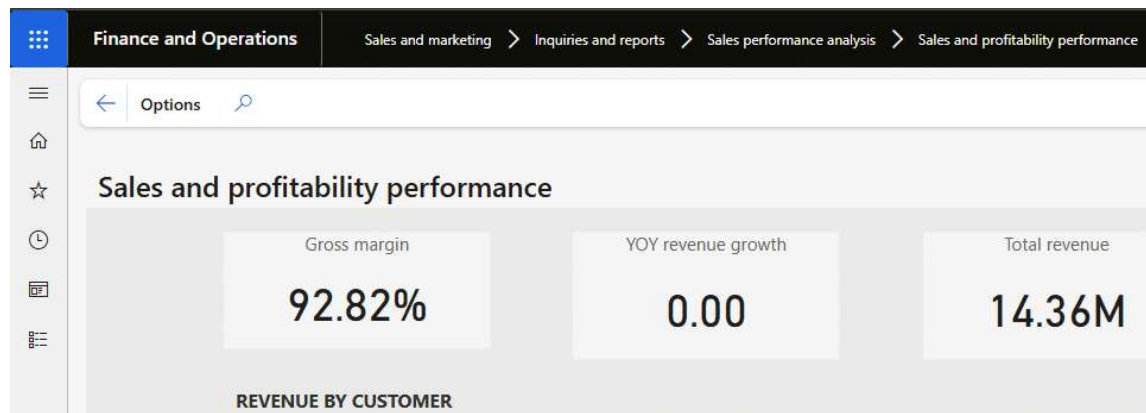
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The out-of-the-box, embedded Power BI reports do not connect to your F&O directly. Instead, these reports connect with the Entity Store.

The reports use a DirectQuery method and pull data from entities instead.

For example, the data source of the “Sales and profitability performance” report is a Sales Cube Entity.



In other words, you need to refresh the entity to see all data from Power BI reports.

## How to Refresh Your F&O Data in Power BI

Follow the steps below to refresh your data:

1. Go to System administration > Setup > Entity Store.
2. Select entity. You can either refresh it on demand or set automatic refresh.
3. Refresh it now by clicking the Refresh button.

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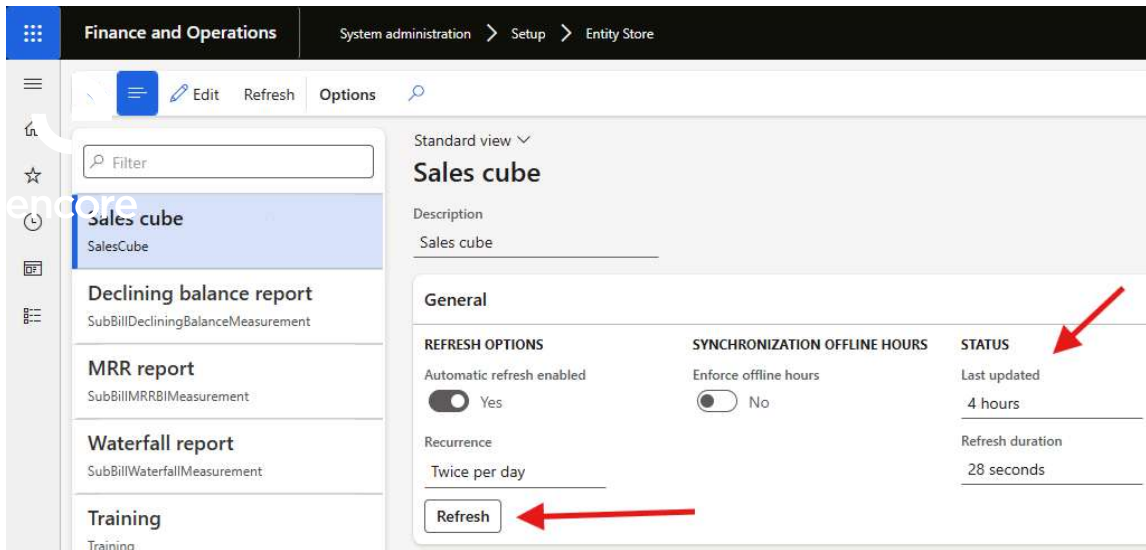
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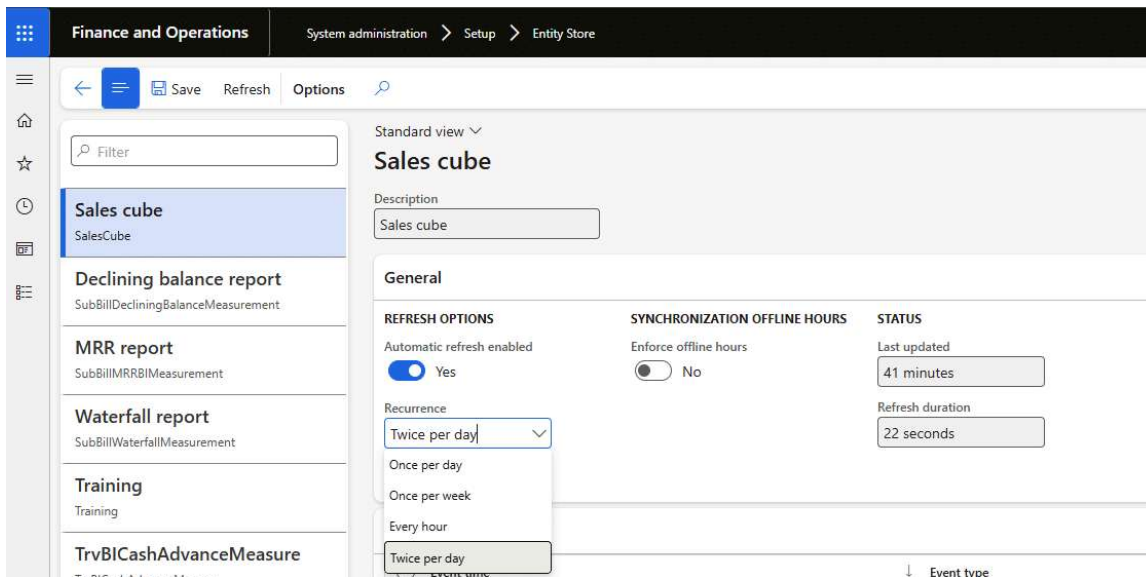
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You should see refreshed data from the reports soon (time depends on volume of data).

You can also enable Automatic refresh, choose how often it will recur, and save the settings.



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# Further Troubleshooting with Power BI in F&O

If the steps above did not refresh your data, most likely the job is pending or withholding. To fix that problem, follow these steps:

1. Go to System administration > Withheld batch jobs.
2. Search “full reset”.
3. Delete any pending/withholding and batch jobs associated with the entity store.

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## System administration

Summary

Manage users

107  
Failed batch jobs

Security configuration

System settings

Lifecycle Services

Data Management IT

0  
High-volume notifications

### Monitor batch jobs

Failed batch jobs

Running batch jobs

Waiting batch jobs

Withheld batch jobs

Job description	Scheduled start date/time	Created by
Sort A to Z	10/20/2021 11:18:24 PM	Admin
Sort Z to A	10/20/2021 11:19:13 PM	Admin
Job description contains	10/20/2021 11:19:13 PM	Admin
full reset	10/20/2021 11:19:26 PM	Admin
Apply	10/20/2021 11:19:26 PM	Admin
Clear	10/20/2021 11:19:26 PM	Admin
Scans for deleted references which have reached the ...	10/20/2021 11:19:27 PM	Admin
Upgrade bank account trans cleared date	10/20/2021 11:19:48 PM	Admin

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After deletion, you will now see “Full reset” in either the Running or Waiting batch jobs monitor section.

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Options

### System administration

Summary

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#### Monitor batch jobs

Failed batch jobs

Running batch jobs

Waiting batch jobs

Withheld batch jobs

Job description	Scheduled start date/time	Created by
<input type="radio"/> Workflow message processing	11/22/2024 1:22:42 PM	Admin
Workflow line item notifications	11/22/2024 1:22:42 PM	Admin
Dual write system cleanup job.	11/22/2024 1:22:44 PM	Admin
Process automation background processes system job	11/22/2024 1:23:00 PM	Admin
Business events batch processor task 1	11/22/2024 1:23:05 PM	Admin
System job to periodically process exceptions in Anal...	11/22/2024 1:23:06 PM	Admin
CheckRecurringJobStatusStuckInExecutingState	11/22/2024 1:23:07 PM	Admin
Testing connection between batch server and data im...	11/22/2024 1:23:08 PM	Admin
System job to periodically synchronize business event...	11/22/2024 1:25:00 PM	Admin
Full reset	11/22/2024 1:26:42 PM	encore
Monitor that all Database Log triggers in the databas...	11/22/2024 1:31:10 PM	Admin
Workflow due date processing	11/22/2024 1:53:42 PM	Admin

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And with that, your out-of-the-box embedded Power BI report in Dynamics 365 Finance & Operations should now refresh properly, and you can get on to working with the report you needed.

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# Product Attributes and Categories in Dynamics 365 Finance & Operations

In this webinar, learn to set up product attributes, categories, and hierarchies in D365 F&O. Get practical tips to streamline setup, launch products, and fix visibility or data issues.

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## Justin Song

Justin is a highly qualified Senior Business Intelligence and Data Analyst who holds numerous professional certifications in accounting, business intelligence, project management, data, development and a wide range of technologies.

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