# Microsoft Power BI Funnel chart

Microsoft Power BI offers a variety of visualizations to meet our data needs. From them, the Power BI Funnel chart is typically used to show the changes over a sequential process that leads to a result. Each stage of a funnel chart represents a percentage of the total.

A funnel chart shape like a funnel having the first stage being the largest and each subsequent stage is smaller than its predecessor.

The first stage is known as the 'intake stage', is typically represents as the largest. Here is an example of the Power BI Funnel chart, the coming topic we will show how to create a funnel chart:

power bi funnel chart
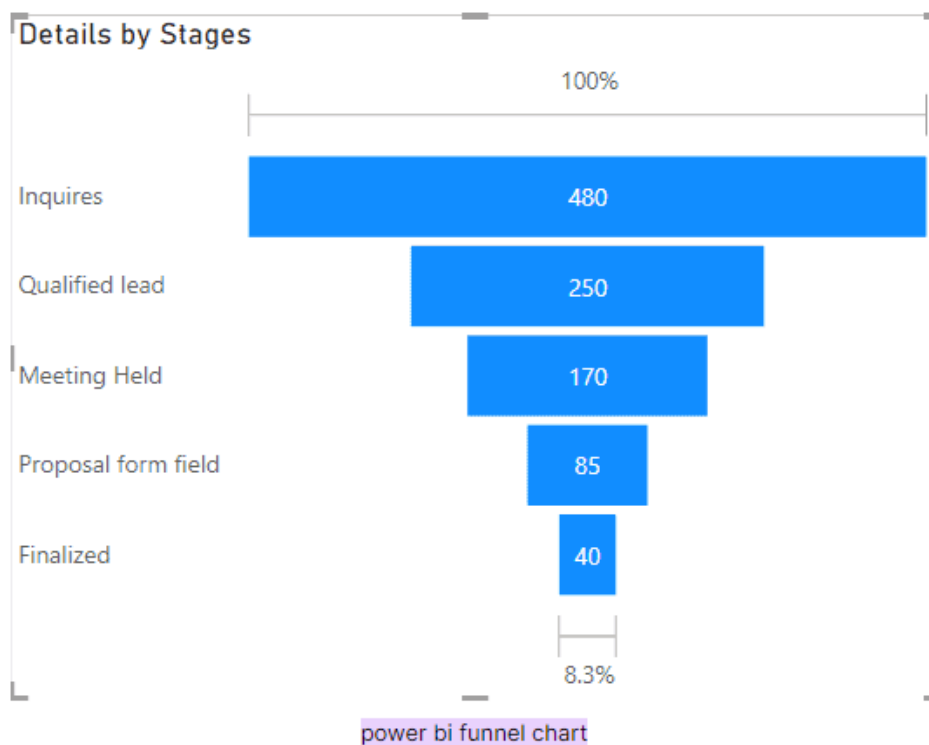
When to use funnel chart

- **Funnel charts in Power BI** are most often seen in business or sales context, where it shows how the starting whole breaks down into the progressive part.
- We can use a funnel chart to analyze the success of a promotional campaign.
- This chart can be used to evaluate the requirement process.
- It can be used to analyze and manage order fulfillment cycles.

Microsoft Power BI Funnel chart

- Funnel charts are a great choice when the data is sequential and moves through at least 4 stages.
- This chart is used to track a shopping cart workflow.
- We can use this chart to track the conversion and retention rates.

How to create a Funnel chart on Power BI?

Now we will see how to **create a Funnel chart on Power BI** using a data source. Your data source may be an excel sheet, a SharePoint list, a text/CSV file, etc.
For creating a funnel chart on Power BI, follow these steps one by one.

Step-1:
Prepare the data, that you are using to create a Funnel chart. Here, we are using prepared data on recruitment analysis like this:

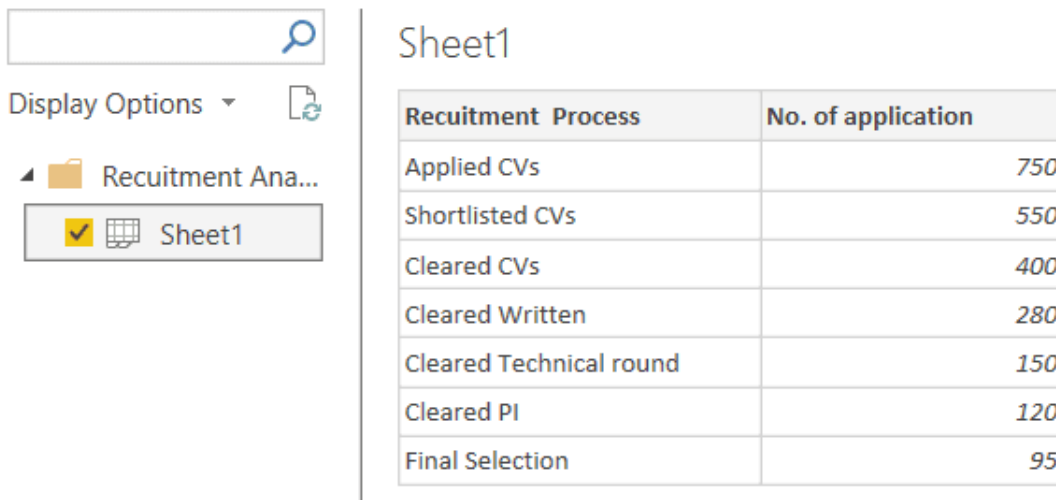| Recuitment Process	No. of application
Applied CVs	750
Shortlisted CVs	550
Cleared CVs	400
Cleared Written	280
Cleared Technical round	150
Cleared PI	120
Final Selection	95

Step-2:
Open **Power BI Desktop > Get data > Excel >** select **Excel data > Open.**
Step-3:

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- After clicking on Open, it will redirect to a navigator page. On which we have to navigate the data from excel to Power BI.
- Select the data, it will reflect on the **Navigator Page** > **Load**

Navigator

Recuitment Process	No. of application
Applied CVs	750
Shortlisted CVs	550
Cleared CVs	400
Cleared Written	280
Cleared Technical round	150
Cleared PI	120
Final Selection	95

create a Funnel chart on Power BI

Now the data are ready to create a visualization. Go to **Report Page**(Upper icon of the data section).
**Step-4:**
Let's create a funnel chart from visualizations, which represents the data **no. of application by Recruitment Process**. For this visualization we will take:

- **Group**: Recruitment Process(It represents the various stages of a recruitment process)
- **Values**: No. of application(It represents the no. of the application corresponding to the various stages)

Microsoft Power BI Funnel chart

Then the visual will be look like this:
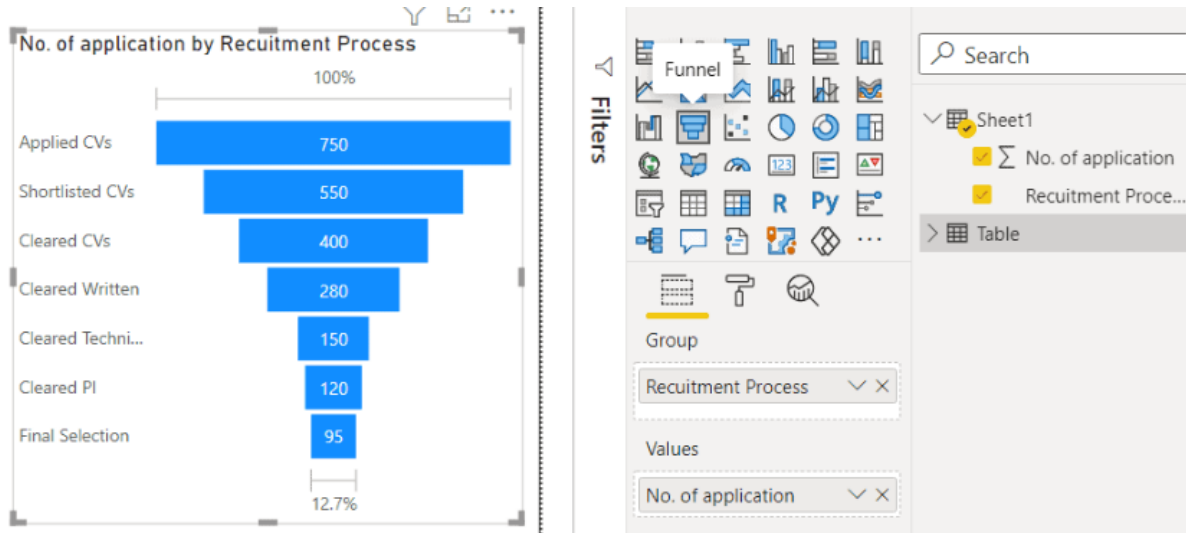
The above visual, it will evaluate the recruitment process by various stages.

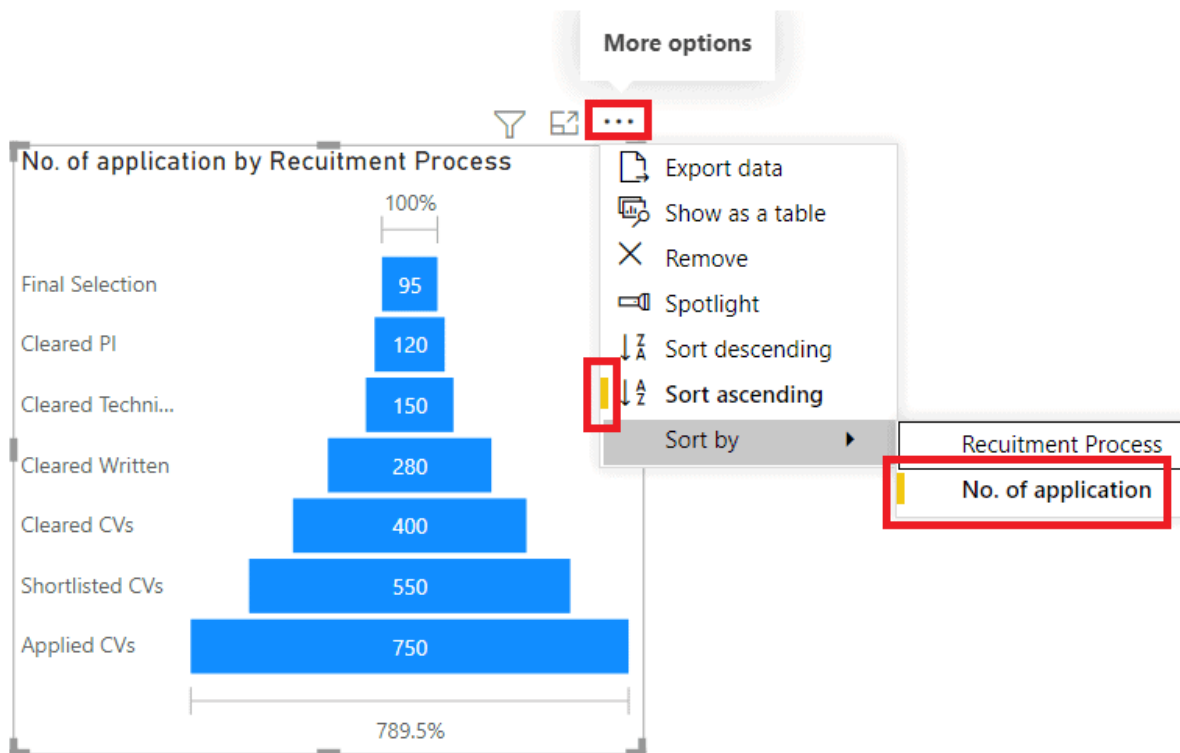# Power bi funnel chart order/ Funnel chart sorting

On the Power BI Funnel chart by default, the **data are sorted in ascending**. Now we will see how to **change the order or sort** according to our requirement.
Select the **Power BI Funnel chart**.
Go to **…(More Option) > Sort by > No. of application > select Sort Ascending**.

Then the visual will look like this:

Microsoft Power BI Funnel chart

power bi funnel chart order

On the above visual it will represent the data(no. of application) sort by ascending order. We can see there is a yellow indicator, that indicating the options which we selected.

If we select sort by Recruitment Process, then it will sort by alphabetical order. Have a look at the below example.
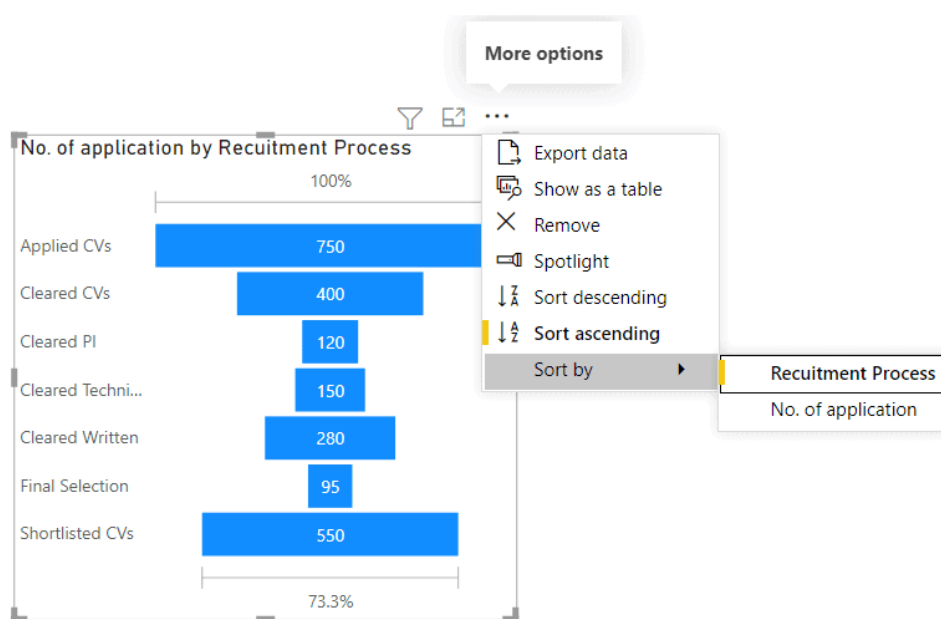
Power bi funnel chart sorting

Microsoft Power BI Funnel chart

We can see the yellow indicator indicates that data(Recruitment Process) is sort by ascending order. Also, we can see the recruitment process on Y-axis sorted alphabetically in ascending order.
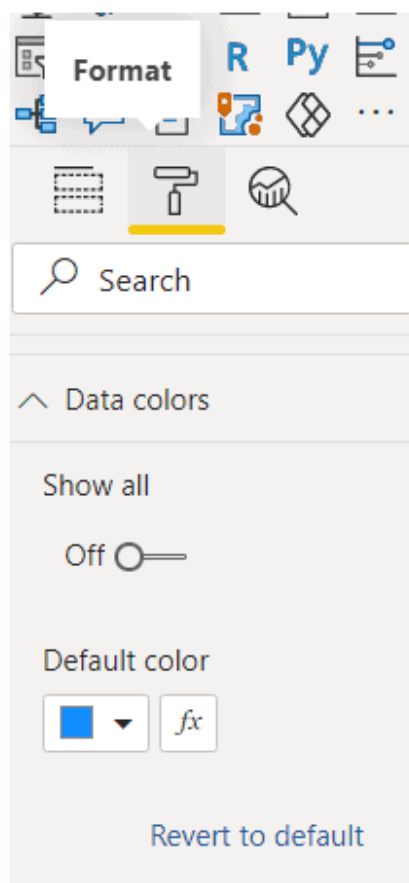
Power BI Funnel chart color

Now we will see how to customize the color on Power BI Funnel chart by following these steps.
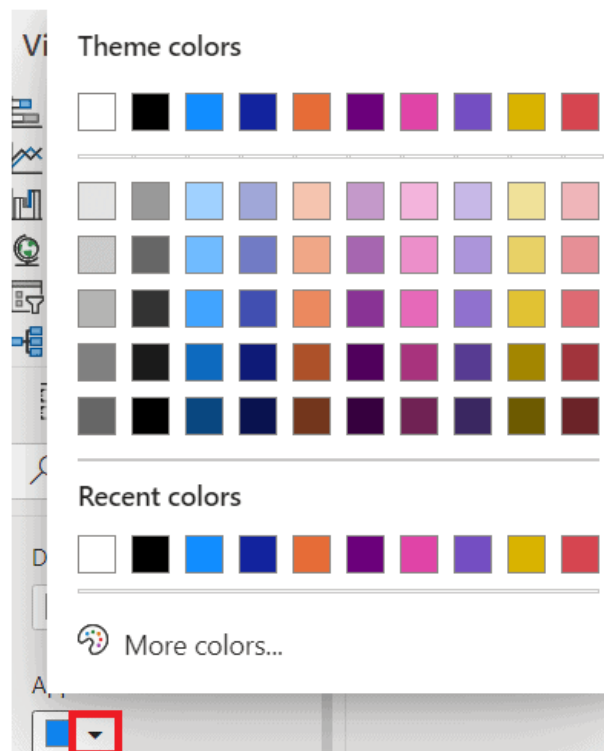
Step-1:

Select the Funnel chart. Go to **Format** pane **> Data colors**

Step-2:

Turn **on** the **show-all** option. Then, we can see the color of each data. Here, we can customize the data color by clicking on the **downward arrow** like this:
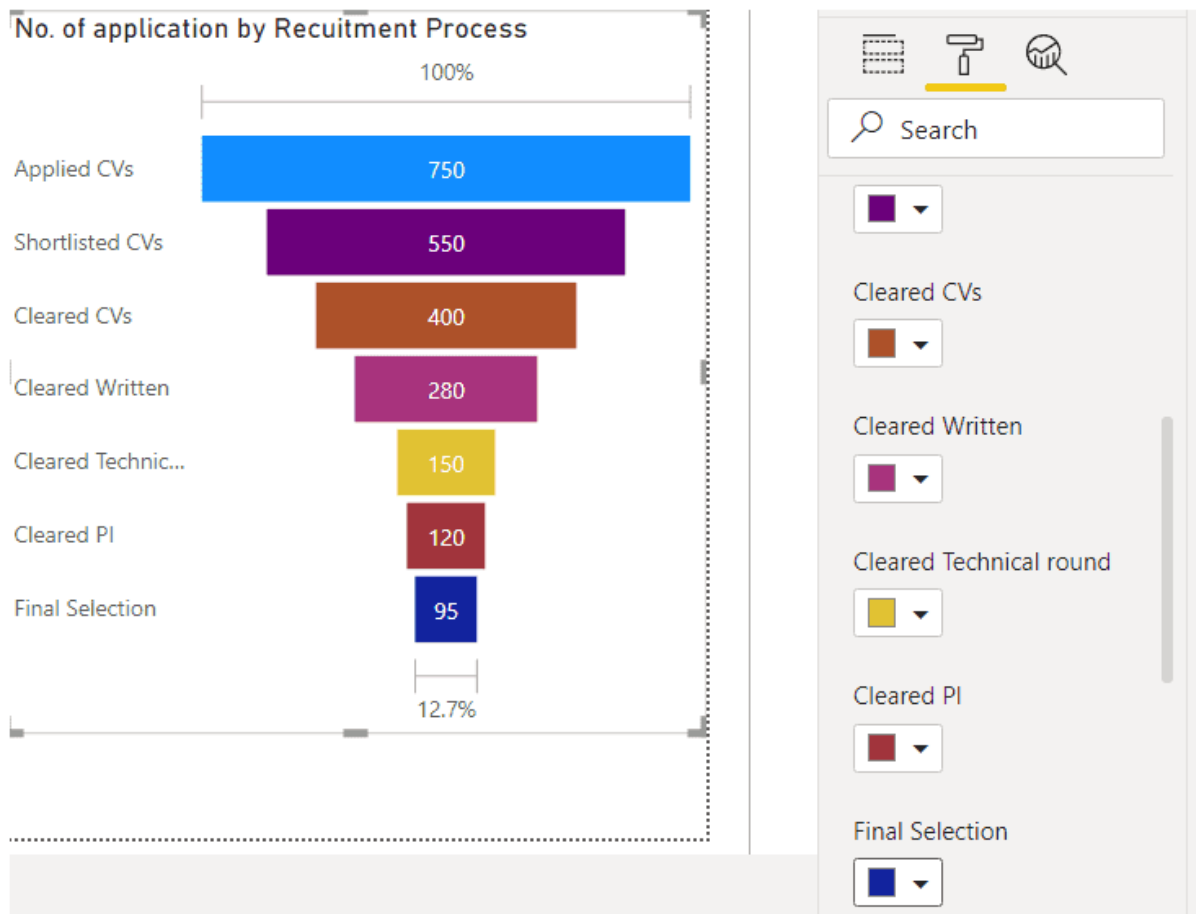

power bi funnel chart color

power bi funnel chart color

Microsoft Power BI Funnel chart

Step-3:
Let's see how the visual look, after customize all the data color:


Funnel Chart color on Power BI

This is how easily we can **customize the Power BI Funnel chart data color**.

Power bi funnel chart show/removes percentage

Here, we will see how to show or **remove the percentage on Funnel chart**. First, we will see how to remove the percentage label from the top and bottom of the chart.
Select the funnel chart. Go to **Format** Pane **> Conversion rate level > Turn off.**

Microsoft Power BI Funnel chart

power bi funnel chart remove percentage
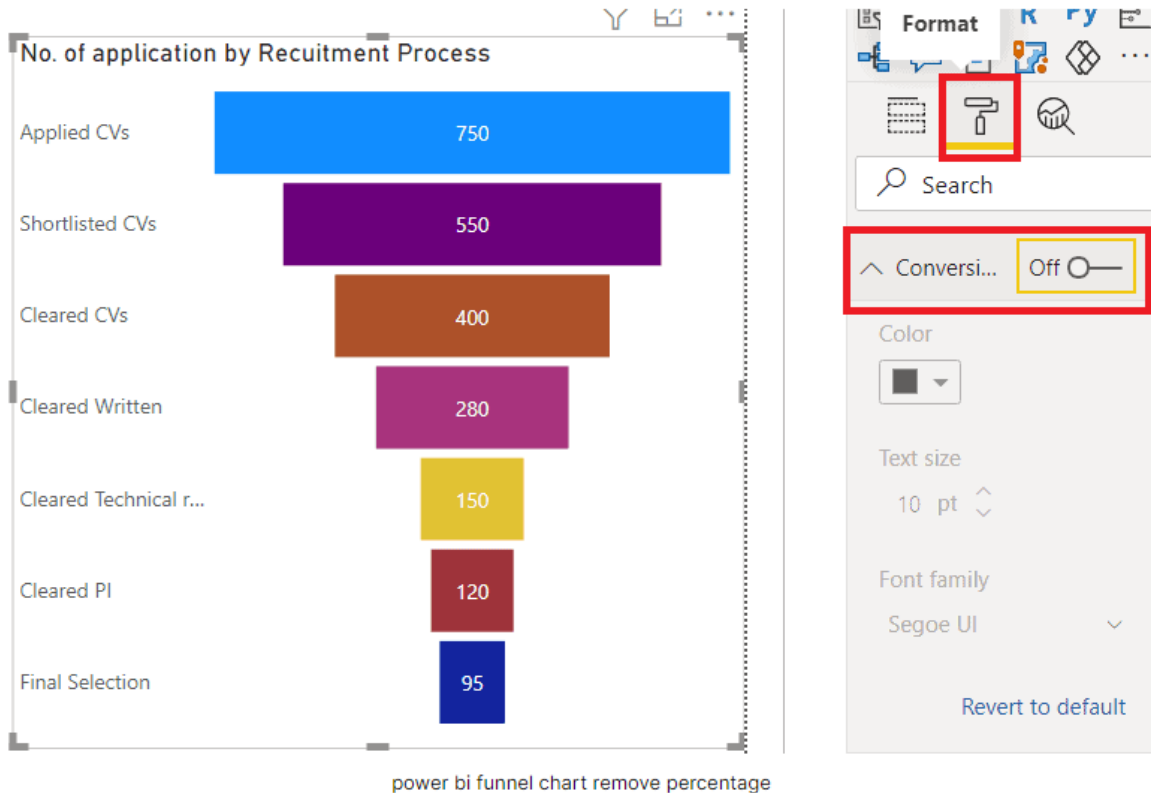
Now we can see the percentage is being removed from the top and bottom of the chart. Also, we can **show each data as a percentage, on the funnel chart** by following these easy steps:

Step-1:

Select the Funnel chart. Go to **Fields** pane **> on values**(No. of application)select the **dropdown > Show value as >** select **Percent of grand total.**
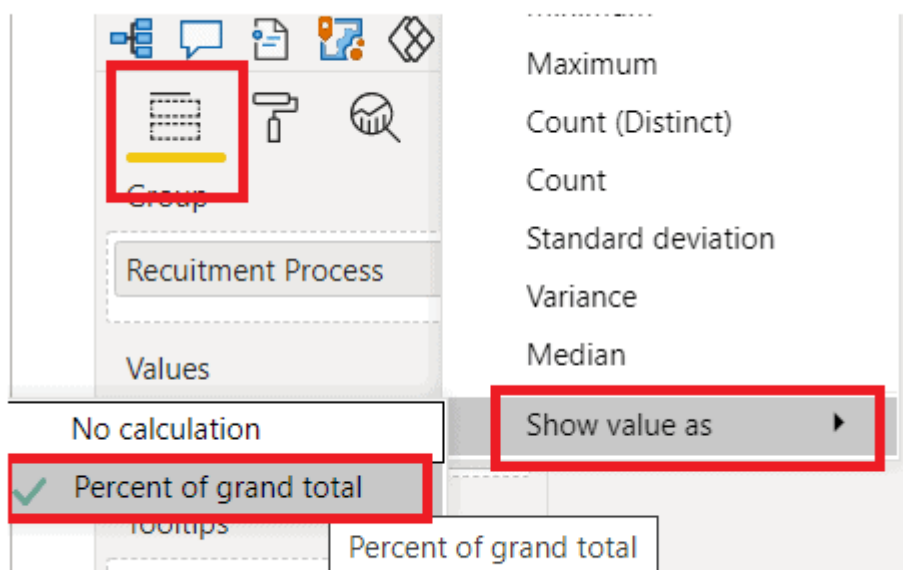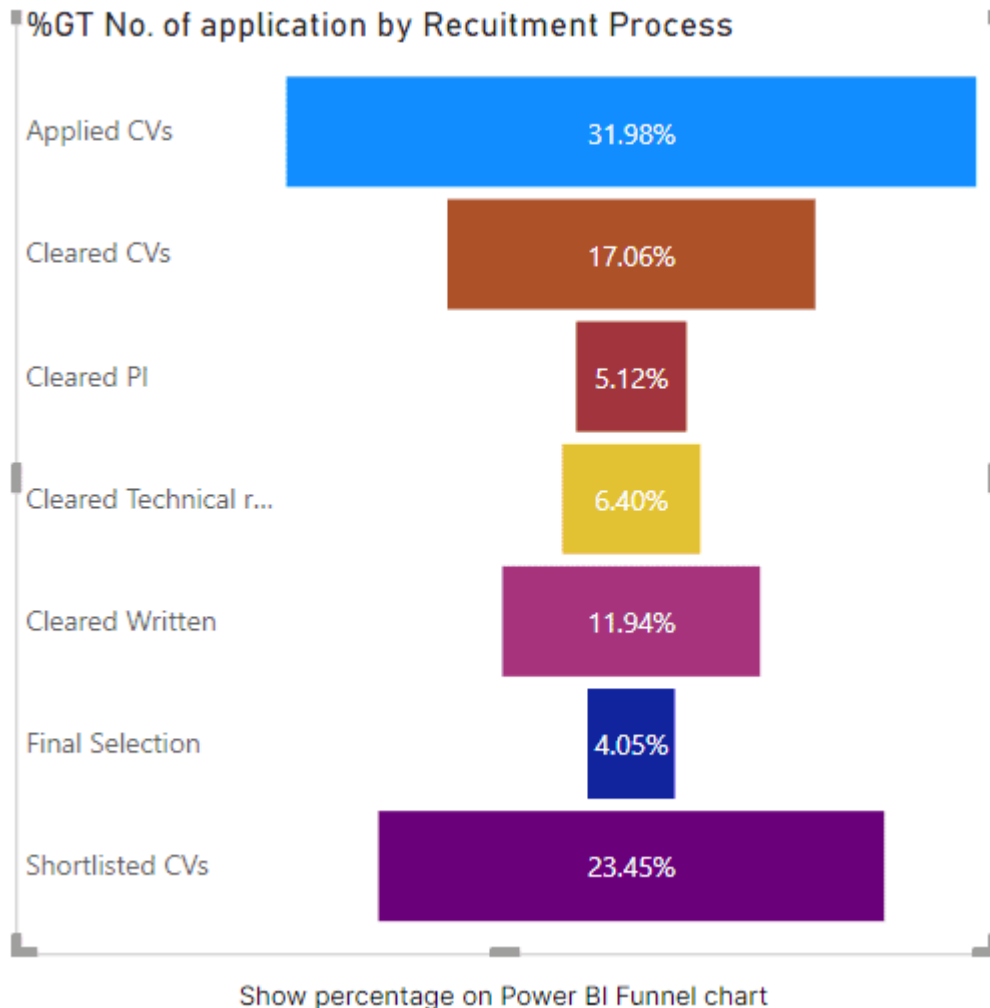

power bi funnel chart show percentage

Microsoft Power BI Funnel chart

Step-2:
Now we can see, on the funnel chart the data are represented as percentage of the total (100%).

Show percentage on Power BI Funnel chart

We can see that the chart represented as the percentage of the total. And also, we can reorder it as ascending or descending according to our requirement.
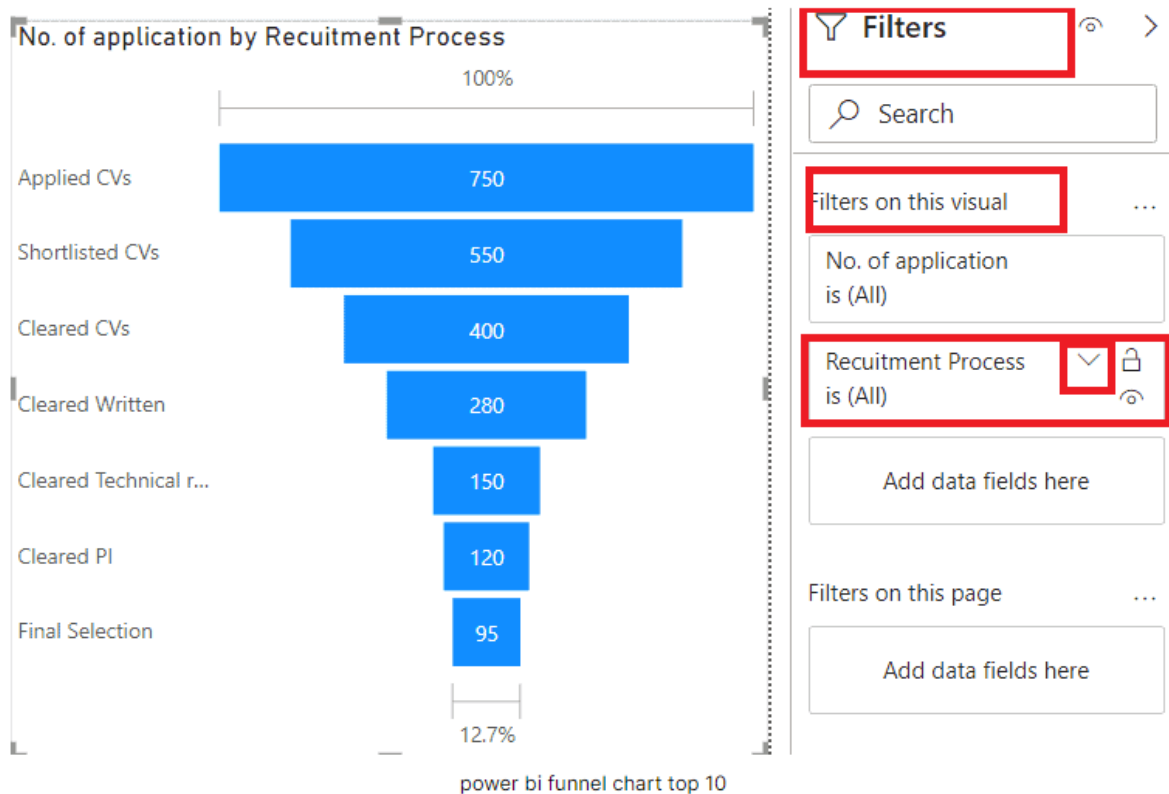
Power bi funnel chart top 10

Now we will see how to show the top 10 or top 5 (any number as your requirement) on the Power BI Funnel chart. We can filter the top N(natural number) on the Funnel chart by these easy steps.
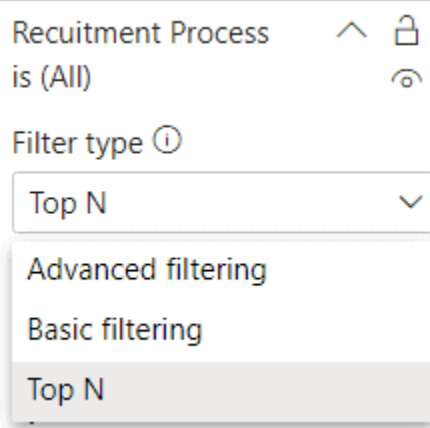
Step-1:
Select the Funnel chart that we created. then go to **Filters** pane.
On **Filters on this visual**, expand **Recruitment Process**.

Microsoft Power BI Funnel chart

power bi funnel chart top 10

Step-2:
Then choose filter type as **Top N**.

 Top N filter on Power BI Funnel chart

Step-3:
The following are the list of options that are available for Power BI Top 10 or Top 5 filters

- Show item: **Top** filter selected by default. But we can change this to Bottom by selecting drop-down.

Microsoft Power BI Funnel chart

- Empty text box: Here we can specify an integer no. i.e. 5, it means it will show Top 5 records. If you enter 10 on that empty text box, then it will show Top 10 records.
- By value: Here we have to drag-drop the required value present in the field. Top N filter use this measure to find Top 5 or Bottom 5 records.
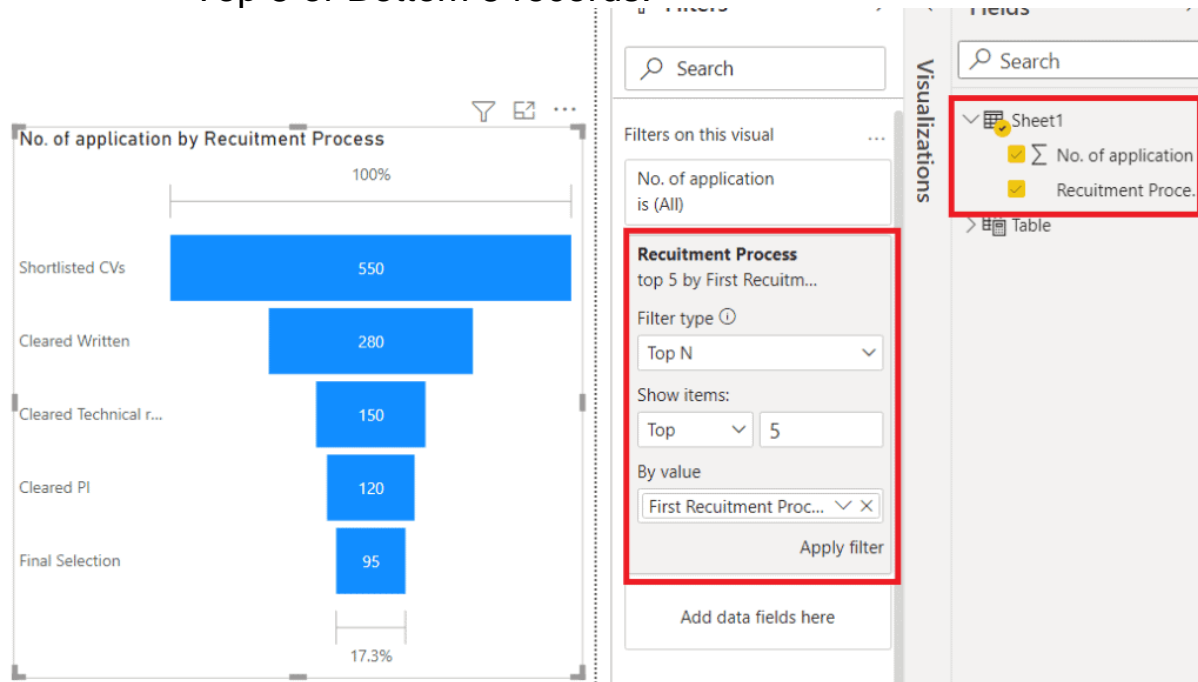
power bi funnel chart top 10

On above chart it is showing top 5 records(as we have less than 10 records). But if you have more than 10 records then apply Top 10 instead of Top 5.

This is how to show **power bi funnel chart top 10**.

Power BI Funnel chart conditional formatting

The Power BI Funnel chart allows doing **conditional formatting on Data colors.** By these following steps, we can do **conditional formatting on funnel chart**.

Step-1:
Select the funnel chart, that we created. Then on the **format** pane, select **Data colors** > click on **Conditional formatting function**(*fx*).

Microsoft Power BI Funnel chart
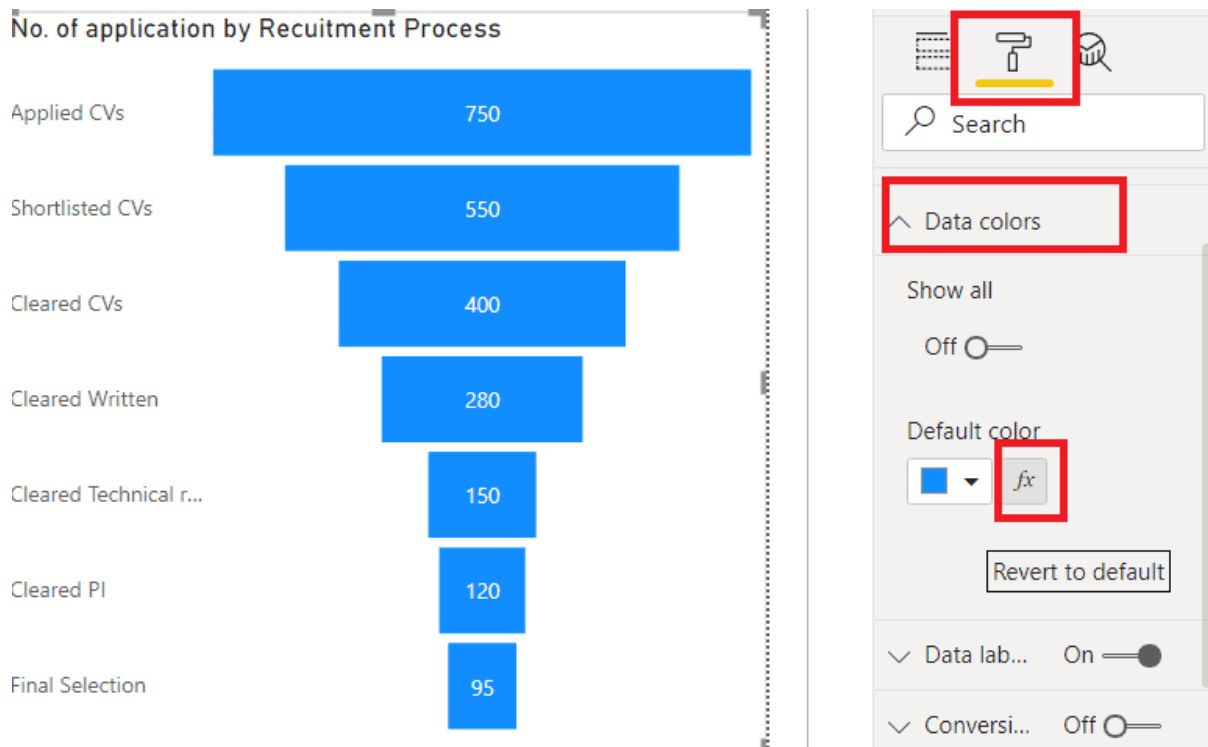
Power bi funnel chart conditional formatting

Step-2:

Then it will redirect a page, where we can apply conditional formatting to the visual. There are 3 types of formats as Color scale, Rules, Field value. Let's do format by **Color scale.**
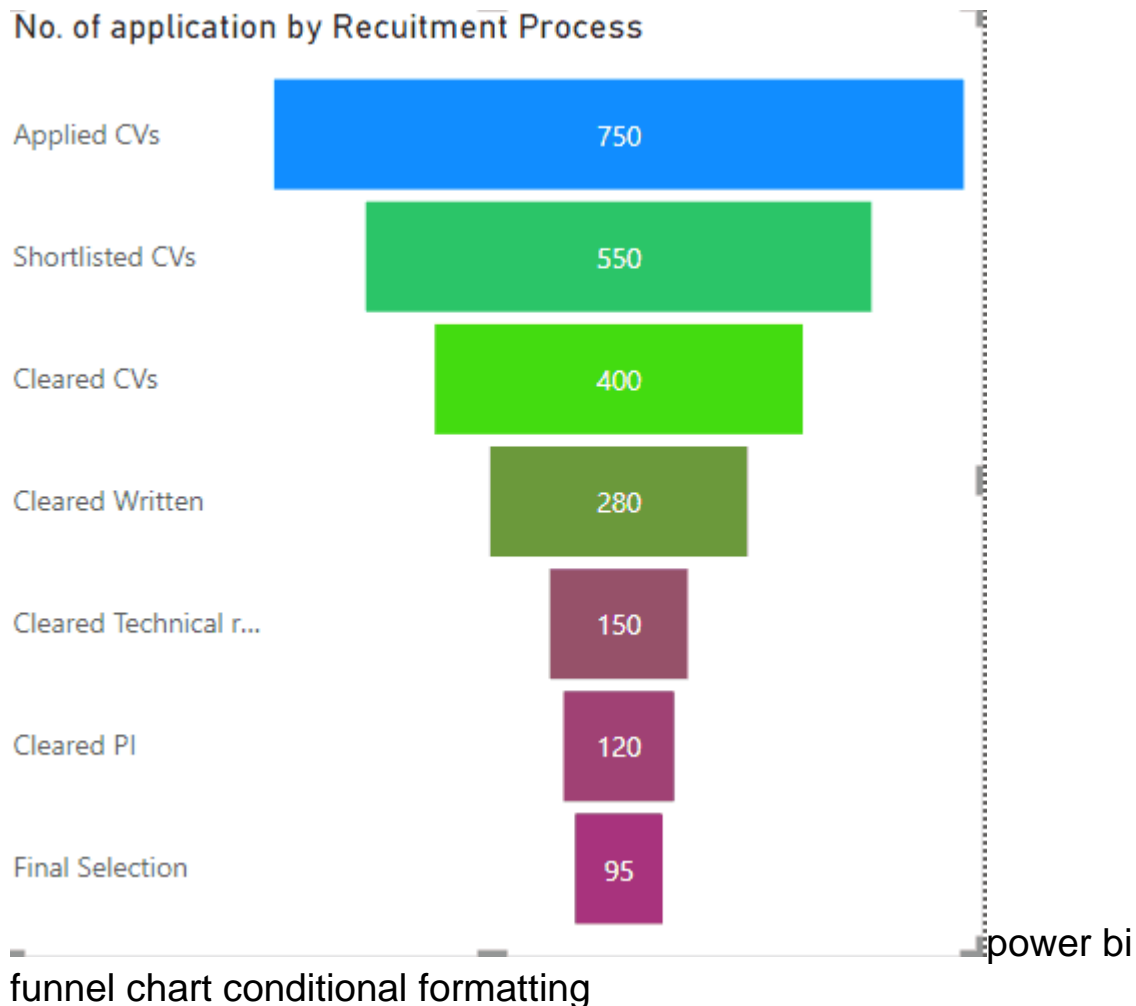

power bi funnel chart conditional formatting

We can set the **Lowest value or custom** value and its respective color from the **color chart** in this format. Like **Minimum**, we can apply conditions on **Center** and **Maximum**. Then click **OK**.

Microsoft Power BI Funnel chart

We can see the condition is being applied on Funnel chart.

No. of application by Recuitment Process

Stage	Value
Applied CVs	750
Shortlisted CVs	550
Cleared CVs	400
Cleared Written	280
Cleared Technical r...	150
Cleared PI	120
Final Selection	95

power bi funnel chart conditional formatting

This is **how to do conditional formatting on Power BI Funnel chart.**

Power BI Funnel chart with total

On Power BI it is not possible to show Total as a bar in the Funnel chart. But we can only summarize into a new row and union it into existing data. For this, we create a new calculated table into the Funnel chart.
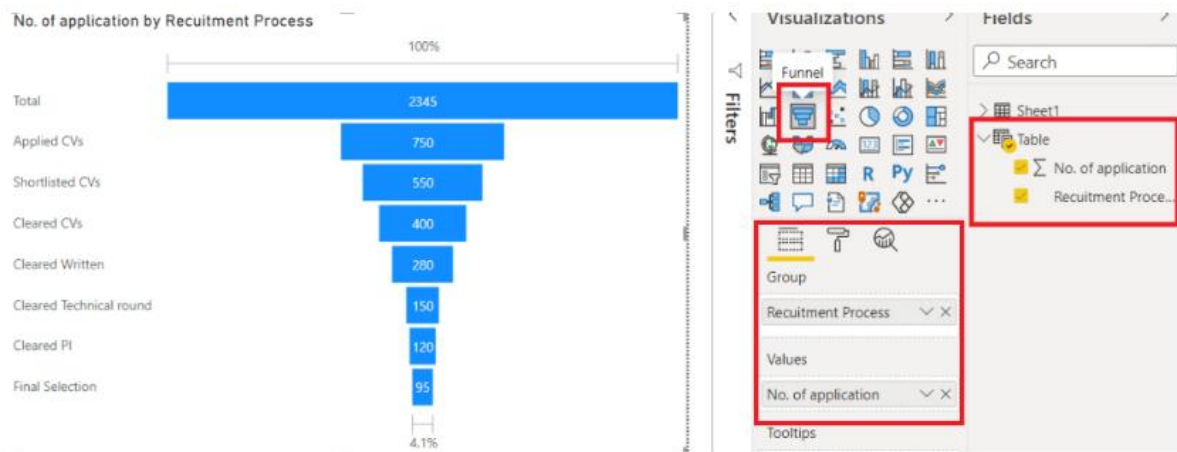
Go to **Data** pane > select **New table** > insert below expression
Table = UNION(SUMMARIZE(Sheet1,"Recuitment Process","Total","No. of application",SUM(Sheet1[No. of application])),Sheet1)

Microsoft Power BI Funnel chart

power bi funnel chart with total

On the **Report** pane, add a **funnel chart from visualizations**. Then add **Table data** to that chart. The chart will look like this:
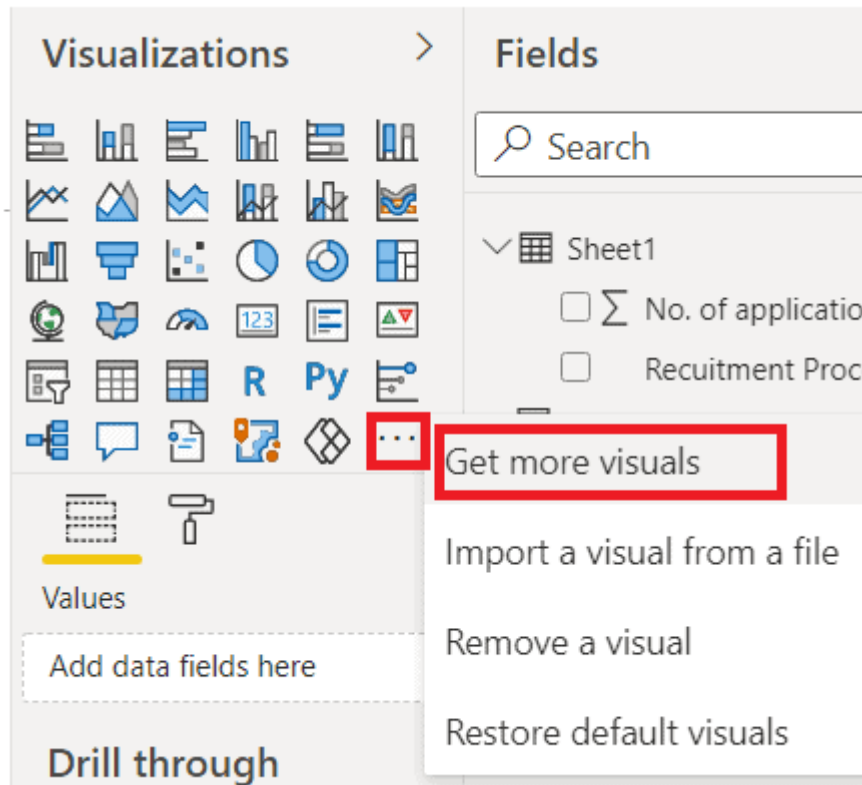

power bi funnel chart with total

This is **how to show total in Power BI Funnel chart.**

Power BI horizontal funnel chart

There is not Horizontal Funnel chart available on Power BI. So we have to download it from Power BI App source by these steps:

Under **Visualizations >** select **Get more visual(…)**

Microsoft Power BI Funnel chart

It will open the **App source** page. Here search **Horizontal Funnel chart > Add.**
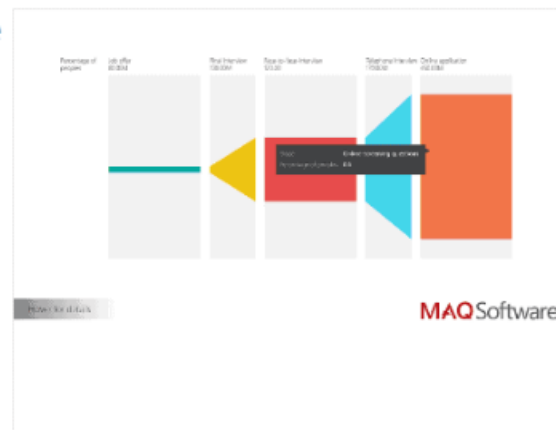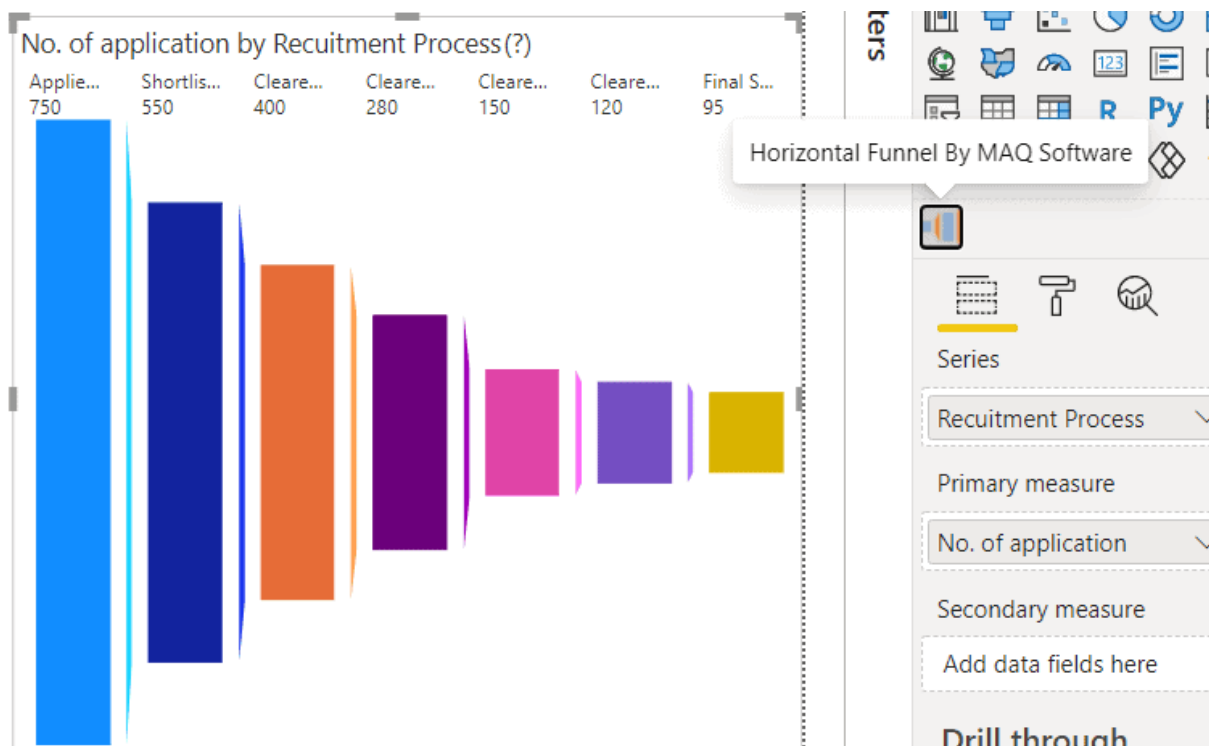
Microsoft Power BI Funnel chart

Let's have an example on this visual and we can see the visual will
look like below:

This is how we can use the **Power BI Horizontal Funnel chart**.

Power BI Format in Funnel chart

Here we will see how to do **format on Power BI Funnel chart** with
examples. Formatting Funnel chart includes the Title of the chart,
Data colors, Backgrounds, Font family, size, etc.

To implements this format, we are going to use the Funnel chart that
we are created earlier. For formatting the Funnel chart, select
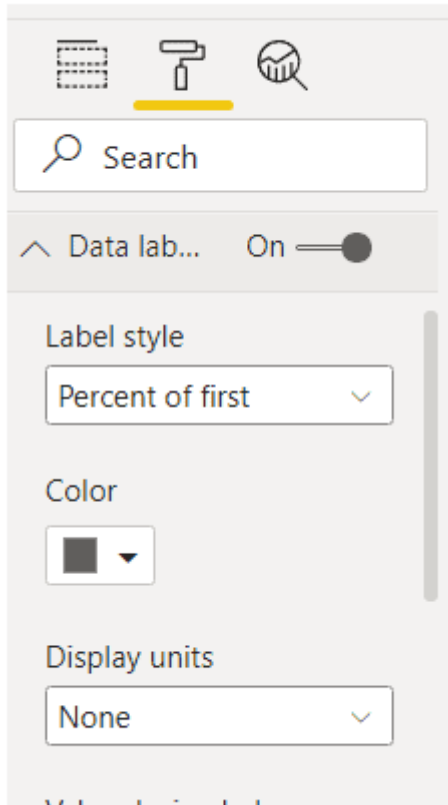the **funnel** chart **>** select **Format** pane.

Microsoft Power BI Funnel chart
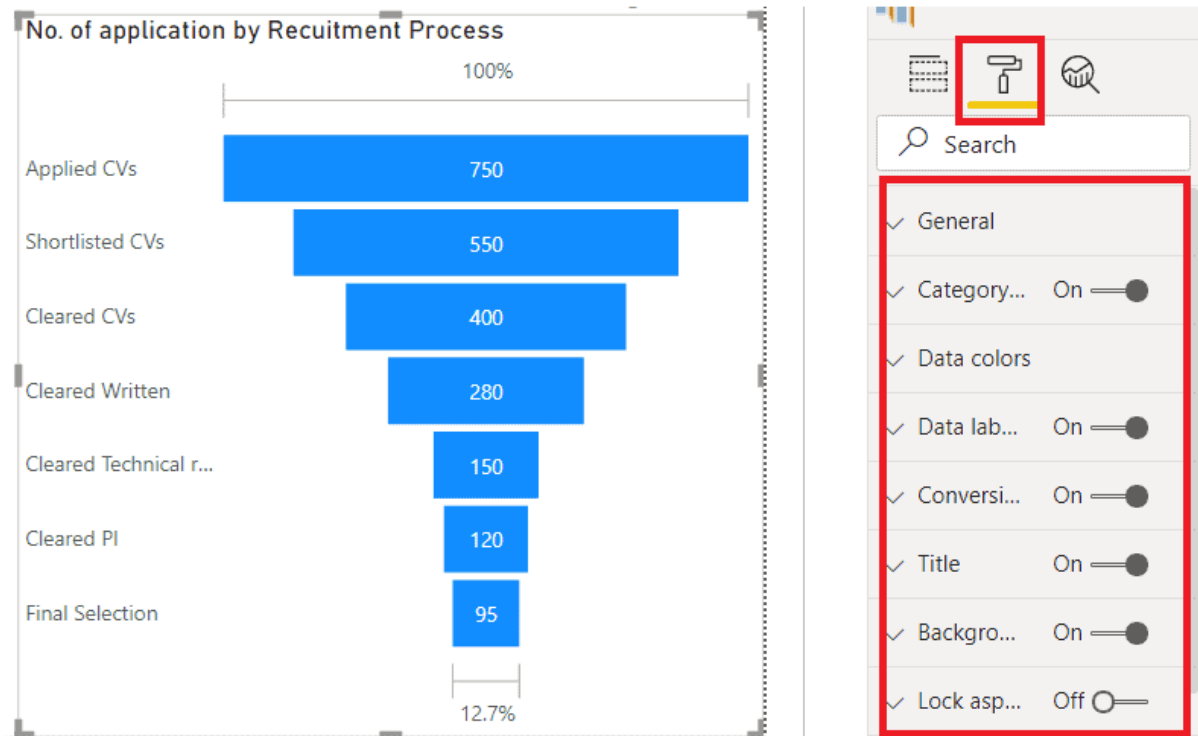
- **Category**: Here we can show or hide the categories on the chart, by **on/off** the toggle. We can customize the **color** of the category(ex- grey to purple), **text size**(ex- 10pt to 12pt), **font family**(ex- Segoe UI to Cambria).
- **Data Color**: Here we can customize the color of each data from the color chart by **turn on** the **Show all** toggle. For example, we will edit the default data color to customize data colors.
- **Data label**: Here we can show/hide the data label on the funnel chart. Also, we can customize the **label style**(i.e, we show it as **Percentage or value with percentage**, etc), **Display unit**(ex-none, auto, Thousands, etc). Also, we can set the position of the data label(inside center or outside end).
-
- **Conversion rate level options:** Here we can **show/hide the Percentage label** from top and bottom of the Funnel chart by turn on/off the toggle.
- **Title:** It is used to modify the title of the chart. Also, we can edit the **font family**, **title's background color**, **font color**(black to blue), **title's alignment**(ex: Left to center), etc.
- **Background Color:** Here, we can give a background color to our Funnel chart(Ex: White to light grey) and set **transparency** on the background color.
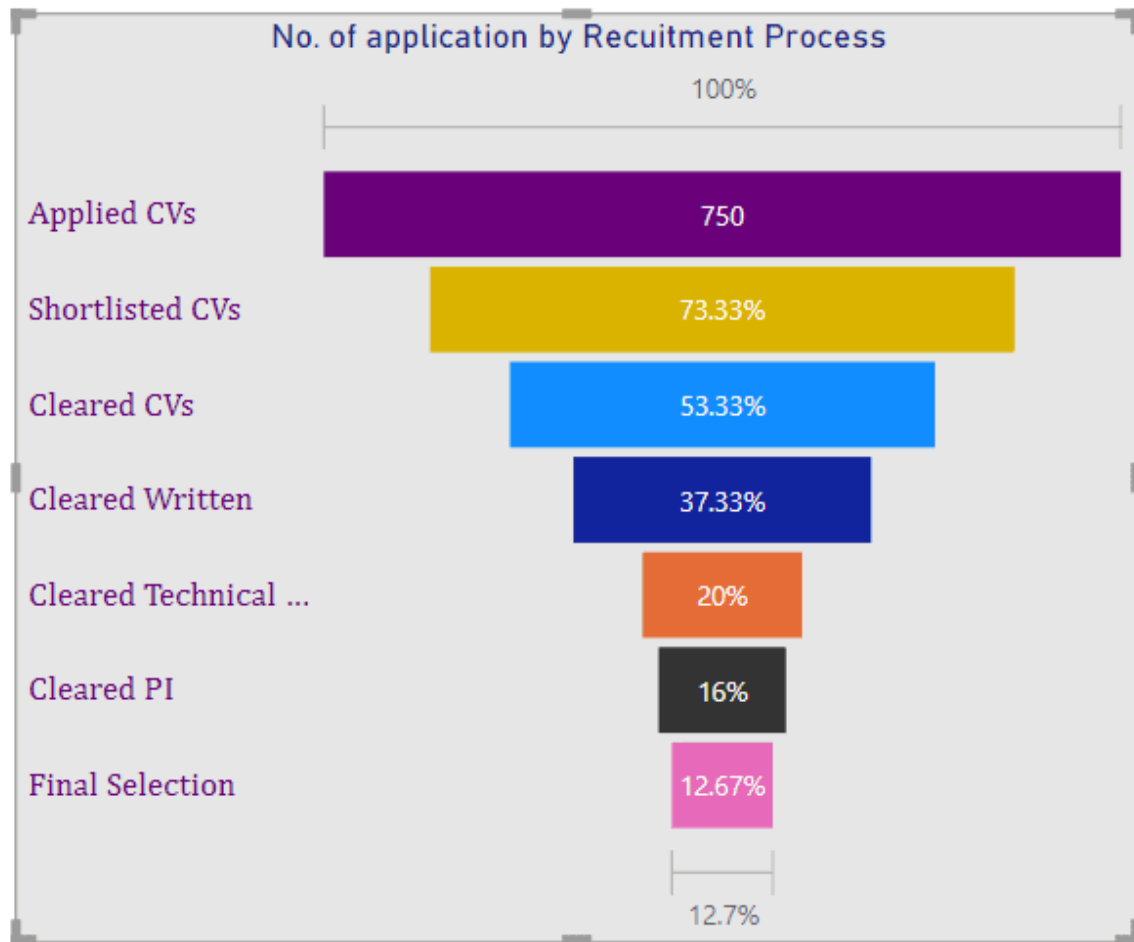
Microsoft Power BI Funnel chart

- **Border:** By **turning on** this, we can give a border to the Funnel chart. Also, we customize the border color and its radius.
- **Shadow**: We can give a shadow to chart by **turning on** the **shadow** option.
  -

Lets see after formatting the Funnel chart will look like below:

Microsoft Power BI Funnel chart

No. of application by Recuitment Process

Stage	Value
	100%
Applied CVs	750
Shortlisted CVs	73.33%
Cleared CVs	53.33%
Cleared Written	37.33%
Cleared Technical ...	20%
Cleared PI	16%
Final Selection	12.67%
	12.7%

We can remove the format, by clicking on the **Revert to Default**. This option is available in each format.