

Exercise: Configure alerts and subscriptions

Introduction

In your data analytics journey, you've learned how numbers tell stories. Now, you'll explore Power BI's subscriptions and alerts features.

By completing this exercise, you will demonstrate your ability to:

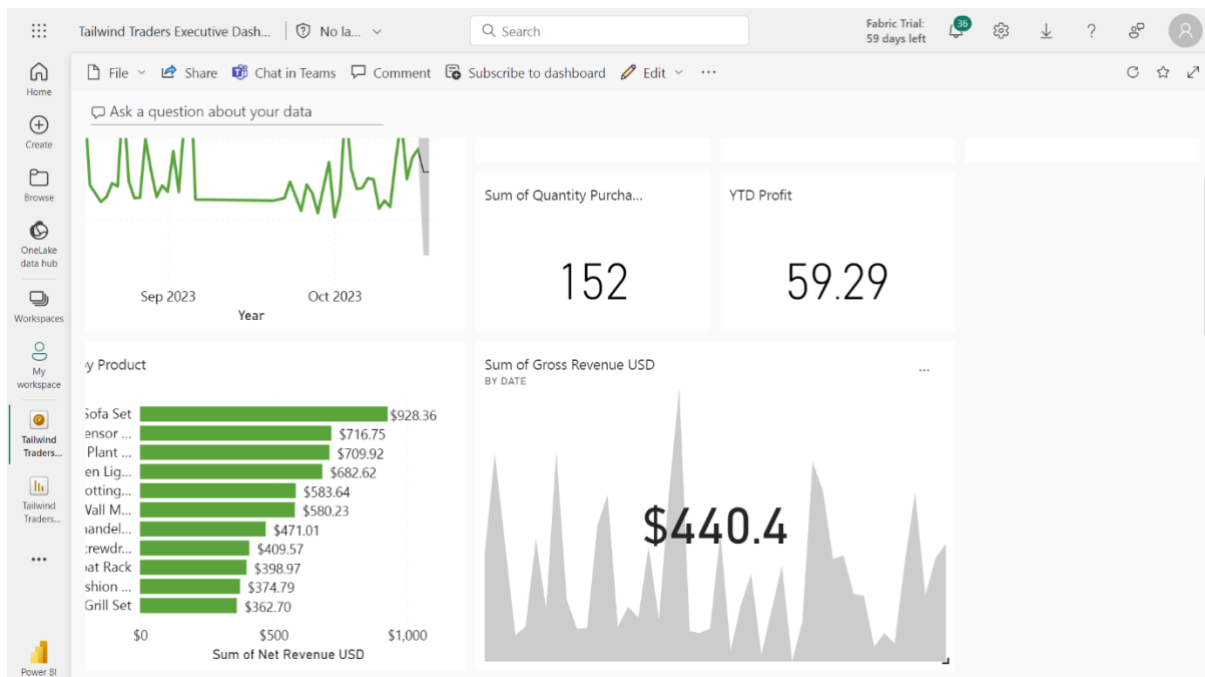
- Configure subscriptions to empower stakeholders with timely and actionable insights.
- Set up proactive alerts, enabling them to steer their strategies precisely and confidently.

Case study

At Tailwind Traders, you receive an email from the executive team. They have tasked you with providing quick, actionable insights to improve the company's market position using Power BI's subscriptions and alerts features.

Instructions

Locate and open the **Tailwind Traders Executive Dashboard** you created in the previous exercise and follow the prompts below to complete the exercise.



Step 1: Create a daily alert for Gross Revenue USD

1. Access the **Manage Alerts** menu for the **Sum of Gross Revenue USD KPI** tile.
2. Create a new alert titled **Gross Revenue USD below \$400** with the following configurations:
 - In the **Condition** section, set the threshold at **\$400**.
 - Set a frequency of **at most every 24 hours**.
3. Save and close the alert.

Step 2: Create a subscription for the Sales Overview tab

1. Access the report's **Sales Overview** tab.
2. Access the **Median Sales Distribution by Country** pie chart and note down the country with the highest **Median Sales** value.
3. Create a subscription for the Sales Overview report with the following configurations:
 - Title the subscription **Sales Weekly Summary**.
 - Set the **Start date** to the current date and the **End date** to **12/31/2025**.
 - For the frequency, select **Weekly** and select **Monday**.
 - Set the **Scheduled time** to **5:00 AM**.
4. Access the **Sales Overview** report page in the **Report page** dropdown and ensure that the toggle switches for the following options are activated:
 - **Permission to view the report in Power BI**
 - **Link to report in Power BI**
 - **Report page preview**
5. Activate the subscription.

Step 3: Create a subscription for the Profit Overview tab

1. Access the report's **Profit Overview** tab.
2. Create a subscription to the report with the following configurations:
 - Name the subscription **Profit Weekly Summary**.
 - Set the **Start date** to the current date and the **End date** to **12/31/2025**.
 - Set the frequency to **Weekly** and select **Monday, Wednesday and Friday** as the days of the week.
 - Set the **Scheduled time** to **6:00 AM**.
3. Access the **Profit Overview** report page in the **Report page** dropdown and ensure that the toggle switches for the following options are activated:
 - **Permission to view the report in Power BI**
 - **Link to report in Power BI**

- **Report page preview**

4. Activate the subscription.

Conclusion

You provided important insights urgently needed by the executive team. Your daily Gross Revenue alerts and weekly Sales and Profit updates keep them well-informed.

This demonstrates how effectively used data can be a strategic tool, helping Tailwind Traders actively shape its market strategy.