

The SMB Focused Dynamics Partner Community

DIRECTIONS
E M E A

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Abstract

In this workshop you will learn how you can create stunning dashboards with the Power BI toolset.

Using a hands-on approach, you will get an overview of the Power BI toolset and how to apply it to create stunning dashboards that not only bring your data to life but also learn from it.

At the end, you will have the skills, so you can turbo-charge your reporting capabilities with Business Central and Power BI.

Prerequisites

For the workshop we will use a virtual machine provided by Freddy.

These are the details on how to connect to it:

- (see paper sheet)

You will also require:

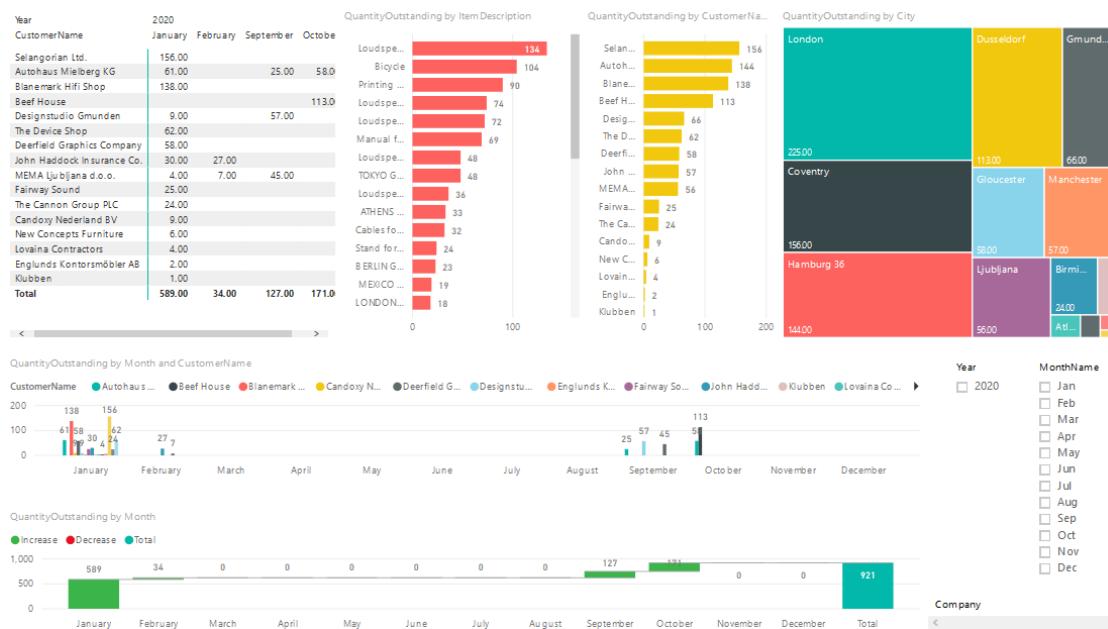
- Power BI Desktop
 - Please visit <https://powerbi.microsoft.com/en-us/desktop/>, download and install Power BI Desktop. You can install it on your local machine (laptop) or on the VM on Azure.
- An account on powerbi.microsoft.com
 - Please visit <https://powerbi.microsoft.com/en-us/> and create a free account.

The objective

The goal of this workshop is to create the following Dashboard:

Year	CustomerName	January	February	September	October
2020	Autohaus Mielberg KG	13,896.21		75,000.00	2,773.44
	Beef House				21,996.26
	Blanemark Hifi Shop	15,650.00			
	Candyoy Nederland BV	1,672.47			
	Deerfield Graphics Company	5,177.50			
	Designstudio Gmunden	2,011.80		141,000.00	
	Englunds Kontormöbler AB	538.99			
	Fairway Sound	2,087.50			
	John Haddock Insurance Co.	3,575.00	5,927.16		
	Klubben	944.60			
	Lovaina Contractors	3,314.32			
	MEMA Ljubljana d.o.o.	1,060.30	1,936.30	119,000.00	
	New Concepts Furniture	702.81			
	Total	66,362.84	7,863.46	335,000.00	24,709.70

With an underlying report:





The approach

We will get there in the following steps:

1. Create a new project in VSCode
2. Add queries to the extension
3. Publish the queries as web services
4. Obtain the ODATA web services URL
5. Import the ODATA queries in Power BI Desktop
6. Create the Data Model and relations
7. Enrich the Data Model with DAX
8. Create the Report(s)
9. Publish your pbix file to the Power BI Service
10. Create a Dashboard
11. Download and install the Gateway
12. Setup Scheduled Refresh
13. Embed the Report(s) into Dynamics Tenerife

Workshop Steps

Create a new project in VSCode

Logon to the VM on Azure. If it is not already open, open the landing page. This is the page that displays information similar to this screenshot:

Microsoft
QR Code Microsoft
Dynamics 365 "Tenerife" Preview Environment
11.0.20723.0 (finus)
SQL Server
localhost\SQLEXPRESS
FinancialsUS

Remote Desktop Access

You can connect to the server in the Dynamics 365 "Tenerife" Preview Environment by following this link.

[Connect](#)

Installation complete

You can view the installation status by following this link.

[View Installation Status](#)

Access the Dynamics 365 "Tenerife" Preview Environment

Choose these links to access the Dynamics 365 "Tenerife" Preview Environment using the Web Client.

[Web Client](#)

If you have installed the Microsoft Dynamics NAV Universal App on your phone, tablet or desktop computer and want to configure the app to connect to this Dynamics 365 "Tenerife" Preview Environment, choose this link.

[Configure App](#)

Access the Dynamics 365 "Tenerife" Preview Environment using Web Services

The Dynamics 365 "Tenerife" Preview Environment exposes functionality as SOAP web services. Choose this link to view the web services.

[View SOAP Web Services](#)

The Dynamics 365 "Tenerife" Preview Environment exposes data as restful OData web services. Choose this link to view the web services

[View OData Web Services](#)

Access the Dynamics 365 "Tenerife" Preview Environment using Visual Studio Code

Download the AL Language Customization for Visual Studio Code (.vsix)

1

launch.json settings:

```
"server": "https://directionssasia1.westeurope.cloudapp.azure.com",
"serverInstance": "NAV",
"tenant": "",
"authentication": "UserPassword",
```

al-0.14.17461

2

Copy the info from part 1 onto notepad. You will need it so that the extension in VSCode can connect and deploy to the service tier.

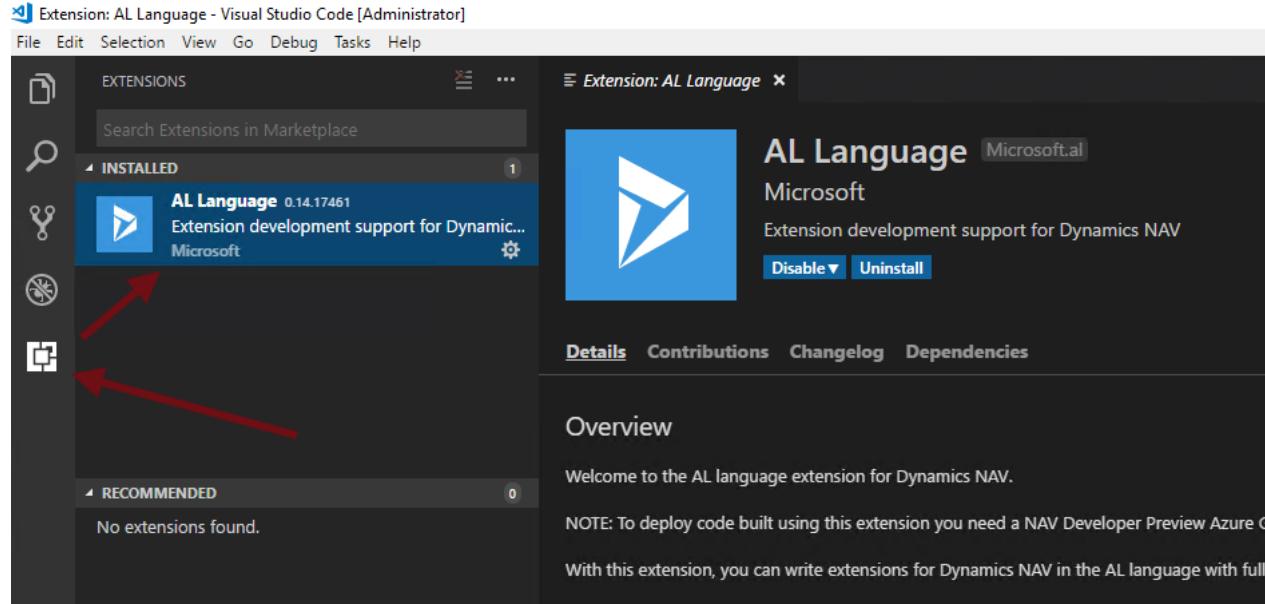
Then download in, part 2, the al.vsix extension package.

Launch VSCode (Visual Studio Code):



If you are prompt to download and install Git, you can, but it is not required for this workshop.

In VSCode, verify in the extensions window that the AL extension is available:

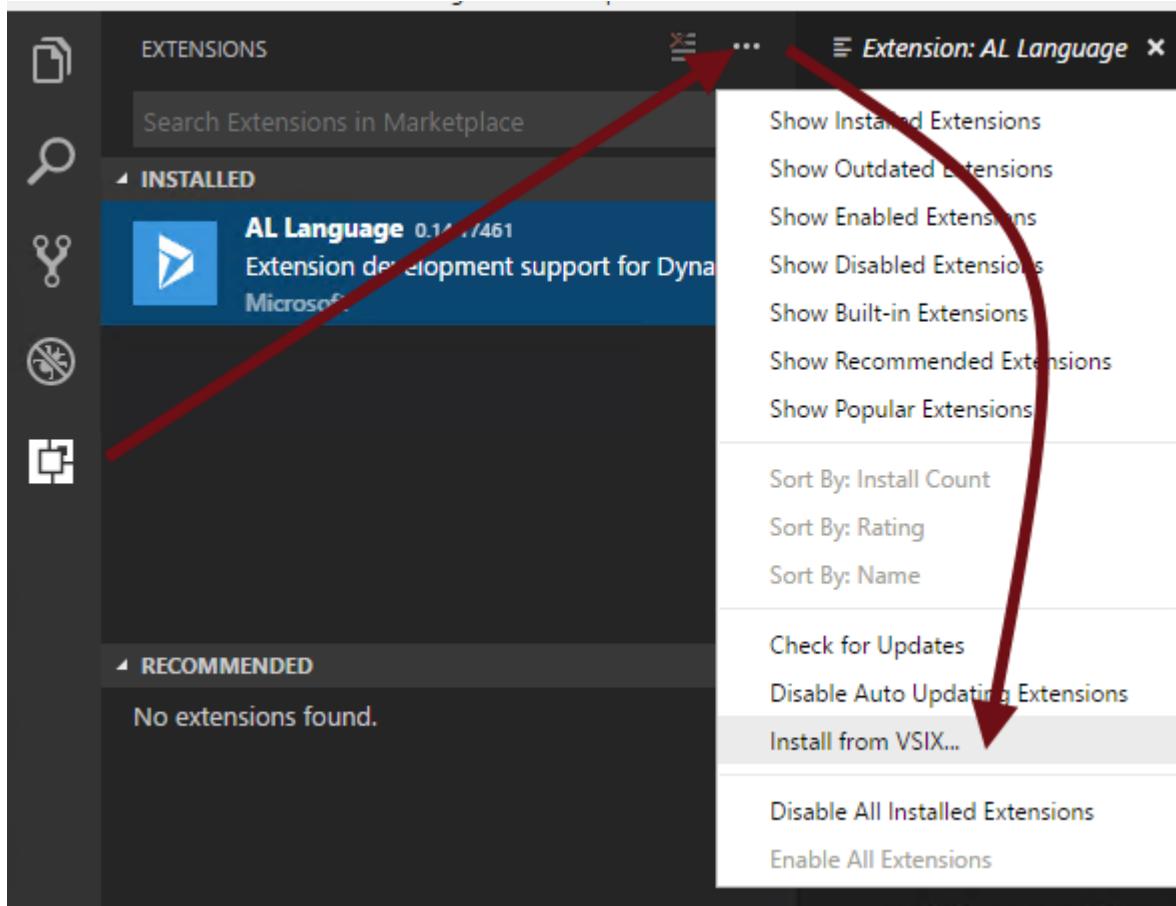


If it's not available or installed, please download it using the link on the landing page:

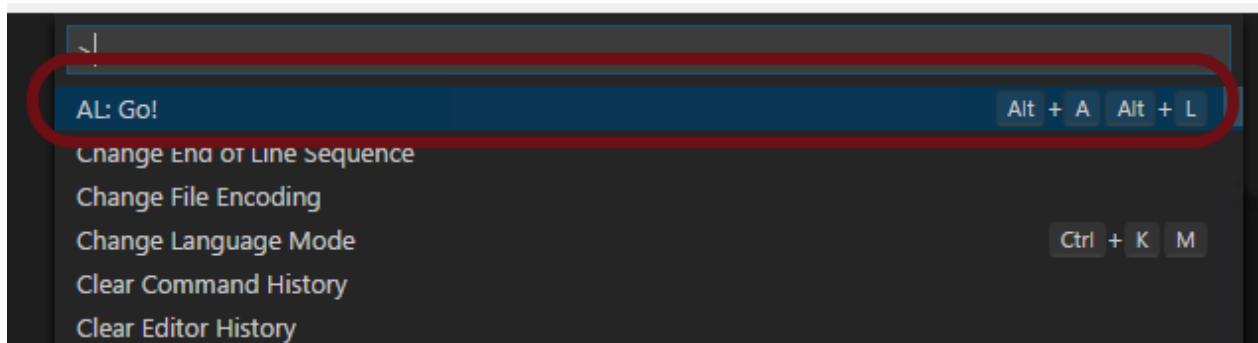
[al-0.14.17461](#)



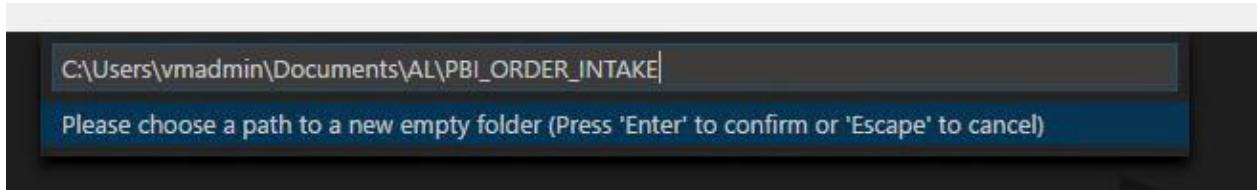
Save the file, then go into VSCode and select install from VSIX:



Now create a new project, using Ctrl+Shift+P and AL:Go!:

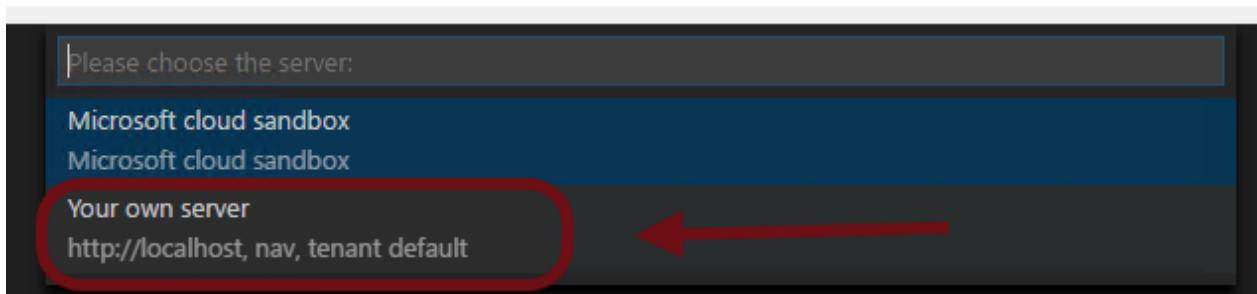


C:\Users\vmadmin\Documents\AL\PBI_ORDER_INTAKE



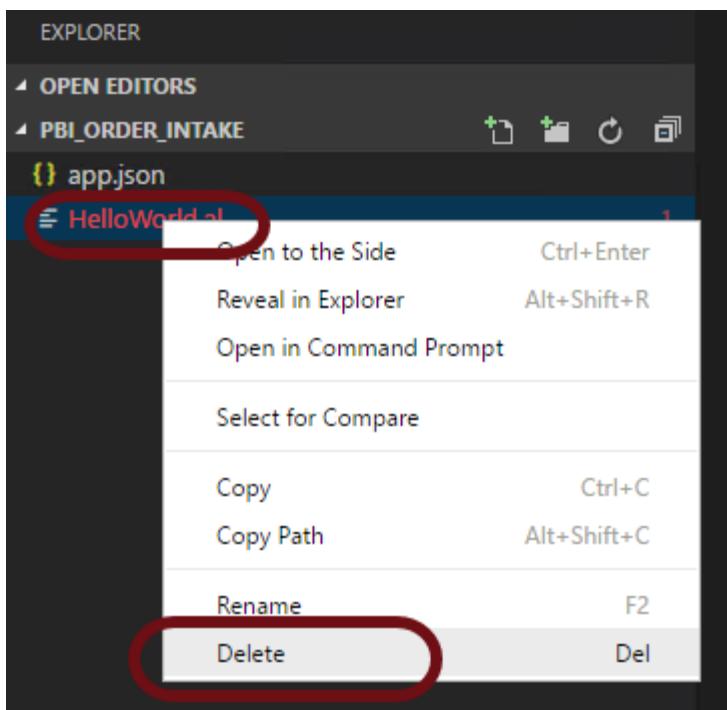
You can use another name and/or location if you prefer.

Then select Your own server:

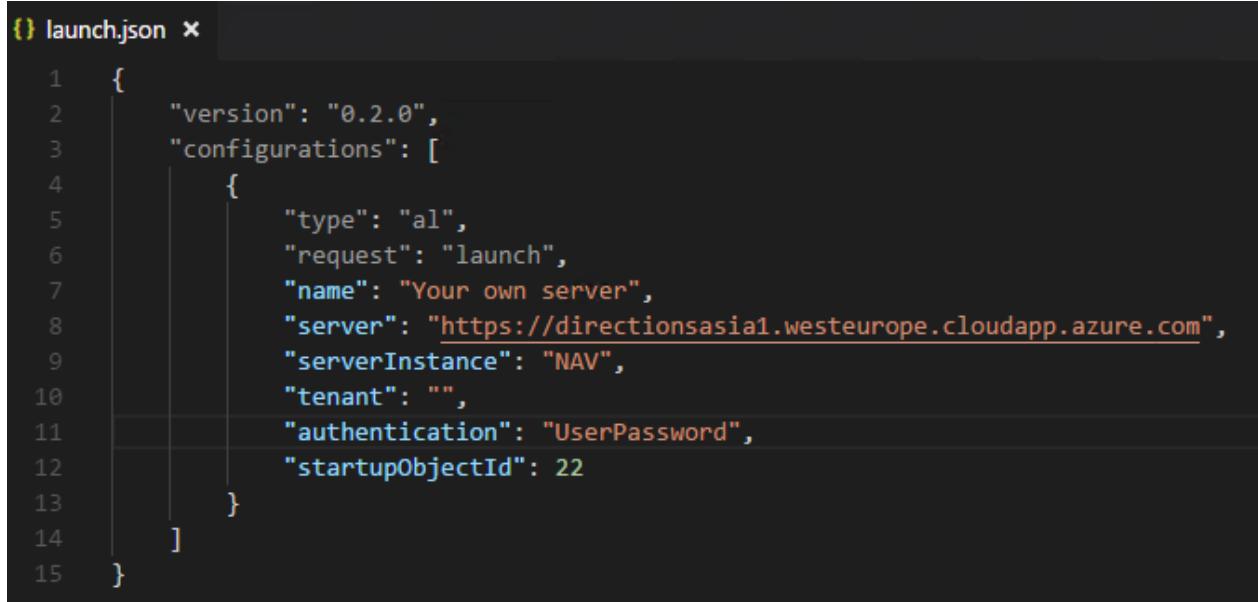


A project is created.

Now delete the HelloWorld.al file:



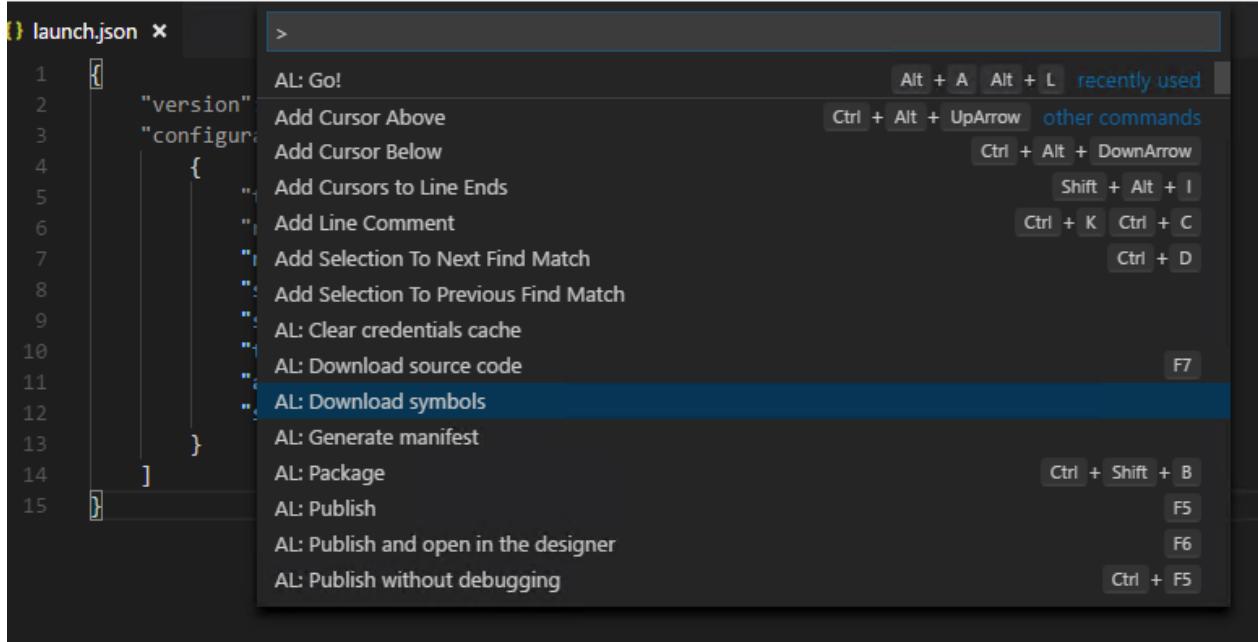
In the launch.json file enter the following information:



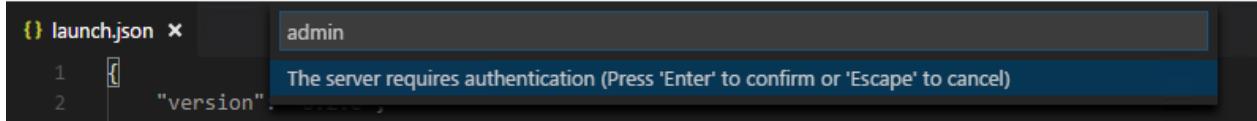
```
{
  "version": "0.2.0",
  "configurations": [
    {
      "type": "al",
      "request": "launch",
      "name": "Your own server",
      "server": "https://directionsasia1.westeurope.cloudapp.azure.com",
      "serverInstance": "NAV",
      "tenant": "",
      "authentication": "UserPassword",
      "startupObjectId": 22
    }
  ]
}
```

Remember, this is the information you copied from the landing page.

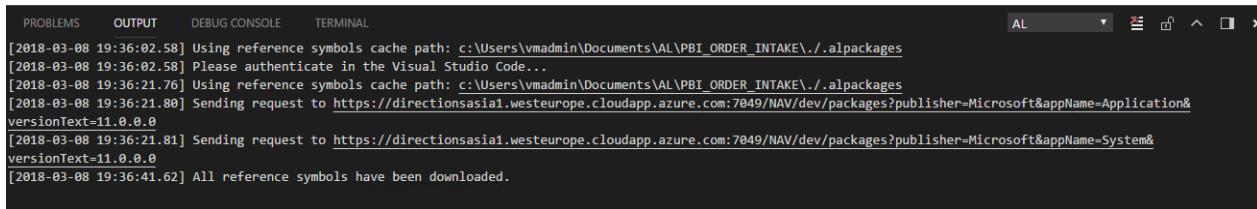
Now, in the command pallet, select AL:Download symbols:



Enter your login & pw when asked for:



Then, after they have been downloaded, at the bottom in VSCode, you should see a similar message:



If desired, in the app.json file you can enter a name and publisher for your extension:

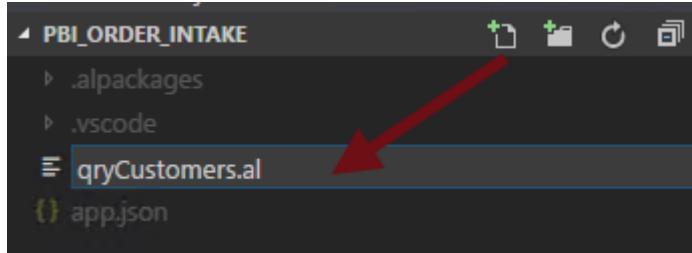
```
{ app.json  x
1  {
2      "id": "2086ac15-8181-4266-ae21-d8b956be2c6f",
3      "name": "PBI_ORDER_INTAKE",
4      "publisher": "Steven Renders",
5      "brief": "",
6      "description": "",
7      "version": "1.0.0.0",
8      "compatibilityId": "1.0.0.0",
9      "privacyStatement": "",
10     "EULA": "",
11     "help": "",
12     "url": "",
13     "logo": "",
14     "capabilities": [],
15     "dependencies": [],
16     "screenshots": [],
17     "platform": "11.0.0.0",
18     "application": "11.0.0.0",
19     "idRange": {
20         "from": 50100,
21         "to": 50149
22     }
23 }
```

We are now ready to add queries to the extension.

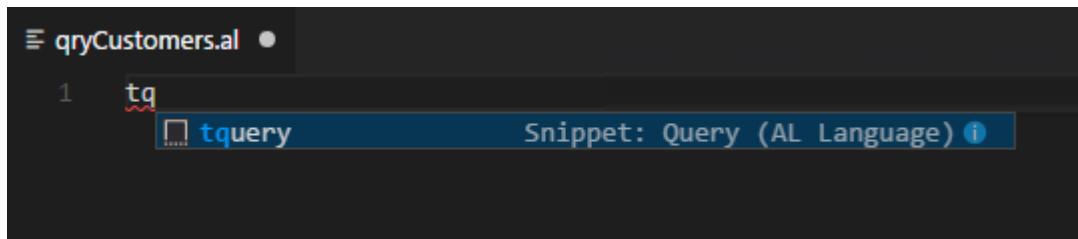
Add queries to the extension

In this extension we will add 3 queries: qryCustomers, qryItems and qryOrderIntake.

Add a new file to the project and name it: qryCustomers.al:



Use the tquery snippet to add a skeleton for a query object:



```
qryCustomers.al •  
0 references  
1 query Id MyQuery  
2 {  
3     QueryType = Normal;  
4  
5     elements  
6     {  
7         0 references  
8         dataitem(DataItemName; SourceTableName)  
9         {  
10            0 references  
11            column(ColumnName; SourceFieldName)  
12            {  
13            }  
14            filter(FilterName; SourceFieldName)  
15            {  
16            }  
17        }  
18    }  
19  
20    var  
21        0 references  
22        myInt: Integer;  
23  
24        trigger OnBeforeOpen()  
25        begin  
26        end;  
27 }
```

Now change the Id and Name and content to the following:

```
qryCustomers.al •
```

```
0 references
1 query 50100 qryCustomers
2 {
3     elements
4     {
5         0 references
6         dataitem(Customer; Customer)
7         {
8             0 references
9                 column(CustomerNo; "No.")
10            {
11            }
12        0 references
13        column(CustomerName; Name)
14        {
15        }
16        0 references
17        column(City; City)
18        {
19        }
20    }
21    trigger OnBeforeOpen();
22    begin
23    end;
}
```

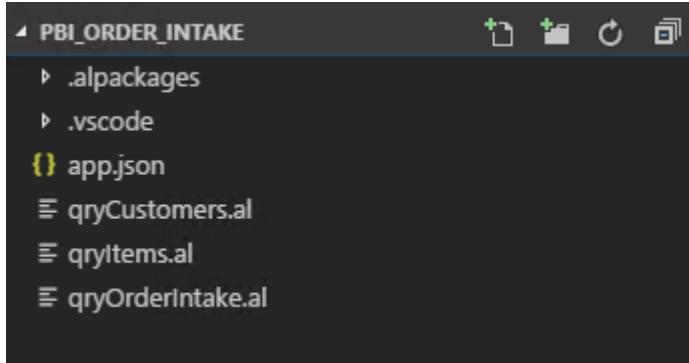
Then in the same way that you created the qryCustomers, add two more queries: qryItems and qryOrderIntake as follows:

≡ qryItems.al ●

```
0 references
1 query 50102 qryItems
2 [
3     elements
4     {
5         0 references
6         dataitem(Item; Item)
7         {
8             0 references
9                 column(ItemNo; "No.")
10                {
11                }
12            0 references
13                column(ItemDescription; Description)
14                {
15                }
16            0 references
17                column(UnitCost; "Unit Cost")
18                {
19                }
20            0 references
21                column(UnitPrice; "Unit Price")
22                {
23                }
24        trigger OnBeforeOpen();
25        begin
26        end;
27 ]
```

```
qryItems.al • qryOrderIntake.al •  
0 references  
1 query 50101 qryOrderIntake  
2 {  
3     QueryType = Normal;  
4  
5     elements  
6     {  
7         0 references  
8             dataitem(SalesLine; "Sales Line")  
9                 {  
10                     0 references  
11                         column(CustomerNo; "Sell-to Customer No.")  
12                         {  
13                             }  
14                         0 references  
15                             column(LocationCode; "Location Code")  
16                             {  
17                                 }  
18                             0 references  
19                             column(ItemNo; "No.")  
20                             {  
21                                 }  
22                             0 references  
23                             column(ShipmentDate; "Shipment Date")  
24                             {  
25                                 }  
26                             0 references  
27                             column(QuantityOutstanding; "Outstanding Quantity")  
28                             {  
29                                 }  
30                             0 references  
31                             column(AmountOutstanding; "Outstanding Amount (LCY)")  
32                             {  
33                                 }  
34             }  
35  
36             trigger OnBeforeOpen()  
37             begin  
38  
39             end;  
40 }
```

Your project now contains three queries:



[Publish the queries as web services](#)

To publish the queries as web services, when deploying the extension, you need to add a web services file to the project.

- Create a new (empty) file, with the name: MyWebservices.xml

In the xml file type the following:

```

MyWebservices.xml ●

1  <?xml version="1.0" encoding="utf-8"?>
2  <ExportedData>
3      <TenantWebServiceCollection>
4          <TenantWebService>
5              <ObjectType>Query</ObjectType>
6              <ServiceName>qryCustomers</ServiceName>
7              <ObjectID>50100</ObjectID>
8              <Published>true</Published>
9          </TenantWebService>
10         <TenantWebService>
11             <ObjectType>Query</ObjectType>
12             <ServiceName>qryItems</ServiceName>
13             <ObjectID>50102</ObjectID>
14             <Published>true</Published>
15         </TenantWebService>
16         <TenantWebService>
17             <ObjectType>Query</ObjectType>
18             <ServiceName>qryOrderIntake</ServiceName>
19             <ObjectID>50101</ObjectID>
20             <Published>true</Published>
21         </TenantWebService>
22     </TenantWebServiceCollection>
23 </ExportedData>
24

```

Then in the launch.json file, change the startupObjectId to 810:

```

EXPLORER   MyWebservices.xml  launch.json
OPEN EDITORS
PBI_ORDER_INTAKE
.alpackages
.vscode
launch.json
app.json
Default publisher_PBI_ORDER_INTAKE_1000.app
MyWebservices.xml
qryCustomers.al
qryItems.al
qryOrderintake.al

```

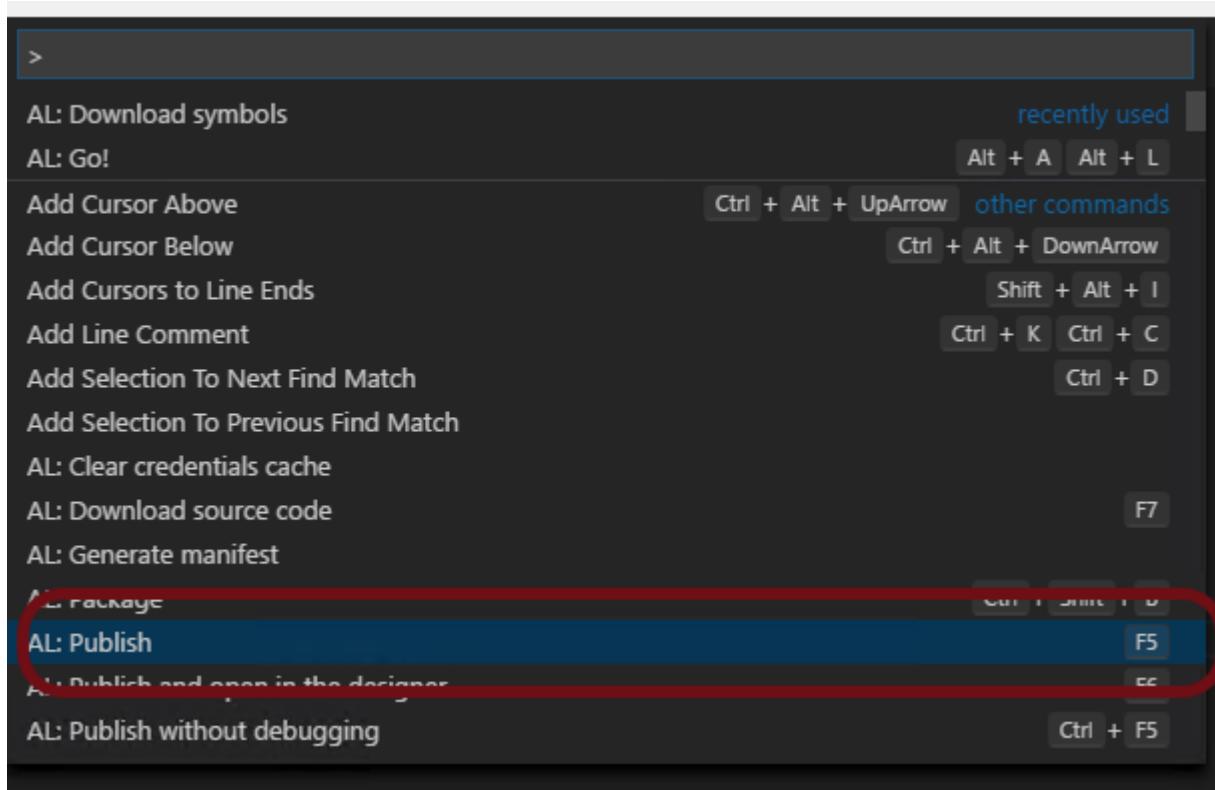
```

{
    "version": "0.2.0",
    "configurations": [
        {
            "type": "al",
            "request": "launch",
            "name": "Your own server",
            "server": "https://directionsasia1.westeurope.cloudapp.azure.com",
            "serverInstance": "NAV",
            "tenant": "",
            "authentication": "UserPassword",
            "startupObjectId": 810
        }
    ]
}

```

This will make sure that when you launch the extension, the web services page opens.

Now Build and Publish your extension, using the F5 shortcut:



The application starts and opens the web services page:

The screenshot shows the Dynamics 365 Web Services page for the 'Finance and Operations' module. The page title is 'Web Services'. A red box highlights several specific query entries in the list:

Object Type	Object ID	Object Name	Service Name	All Tenant	Public	OData V4 URL	OData URL	SOAP URL
Query	50	Power BI Customer List	Power BI Customer List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	53	Power BI GL Amount List	Power BI GL Amount List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	58	Power BI GL Budgeted Amount	Power BI GL BudgetedAmount	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	52	Power BI Item Purchase List	Power BI Item Purchase List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	57	Power BI Item Sales List	Power BI Item Sales List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	54	Power BI Jobs List	Power BI Jobs List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	64	Power BI Purchase Hdr. Vendor	Power BI Purchase Hdr. Vendor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	56	Power BI Purchase List	Power BI Purchase List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	60	Power BI Sales Hdr. Cust.	Power BI Sales Hdr. Cust.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	55	Power BI Sales List	Power BI Sales List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	59	Power BI Top Cust. Overview	Power BI Top Cust. Overview	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	65	Vendor Item Ledger Entries	Power BI Vend. Item Ledg. Ent.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	63	Power BI Vendor Ledger Entries	Power BI Vendor Ledger Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	51	Power BI Vendor List	Power BI Vendor List	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	50100	qryCustomers	qryCustomers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	50102	qryItems	qryItems	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	50101	qryOrderIntake	qryOrderIntake	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	269	Res. Ledger Entries	ResLedgerEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	101	Sales Dashboard	SalesDashboard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	105	Sales Opportunities	SalesOpportunities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	104	Sales Orders by Sales Person	SalesOrdersBySalesPerson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	106	Segment Lines	SegmentLines	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	100	Top Customer Overview	TopCustomerOverview	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	266	Value Entries	ValueEntries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable
Query	...	263	Vendor Ledger Entries	<input type="checkbox"/>	<input checked="" type="checkbox"/>	https://directionsasia1.westeurope...	https://directionsasia1.westeurope...	Not applicable

Here you should now see the queries in your extension.

Obtain the ODATA web services URL

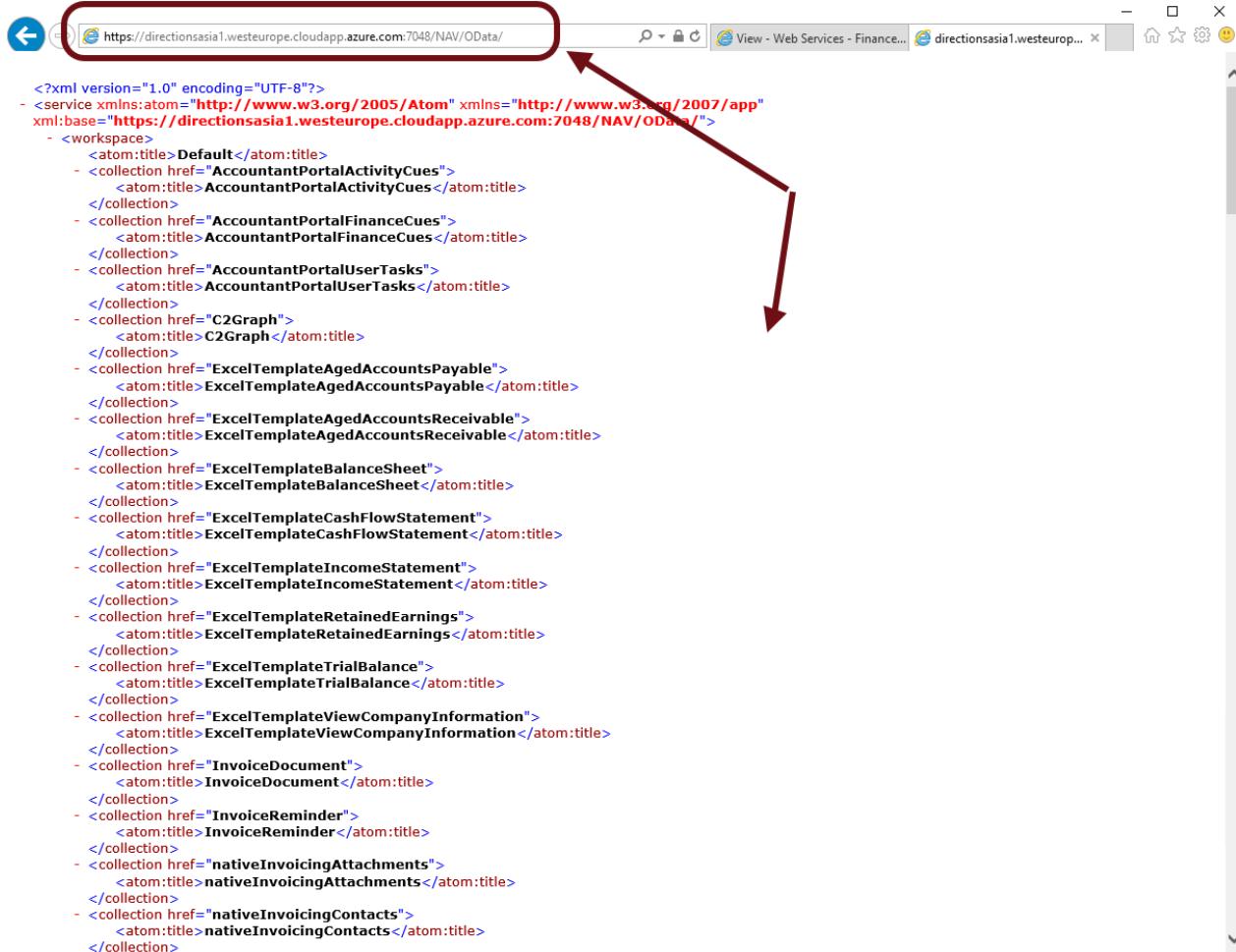
In the web services page, copy the ODATA URL of one of the queries. It should look similar to the following:

- [https://directionsasia1.westeurope.cloudapp.azure.com:7048/NAV/OData/Company\('CRONUS%20USA%20Inc.+\)/qryCustomers](https://directionsasia1.westeurope.cloudapp.azure.com:7048/NAV/OData/Company('CRONUS%20USA%20Inc.+)/qryCustomers)

Remove everything after OData, until your URL looks like the following:

- <https://directionsasia1.westeurope.cloudapp.azure.com:7048/NAV/OData/>

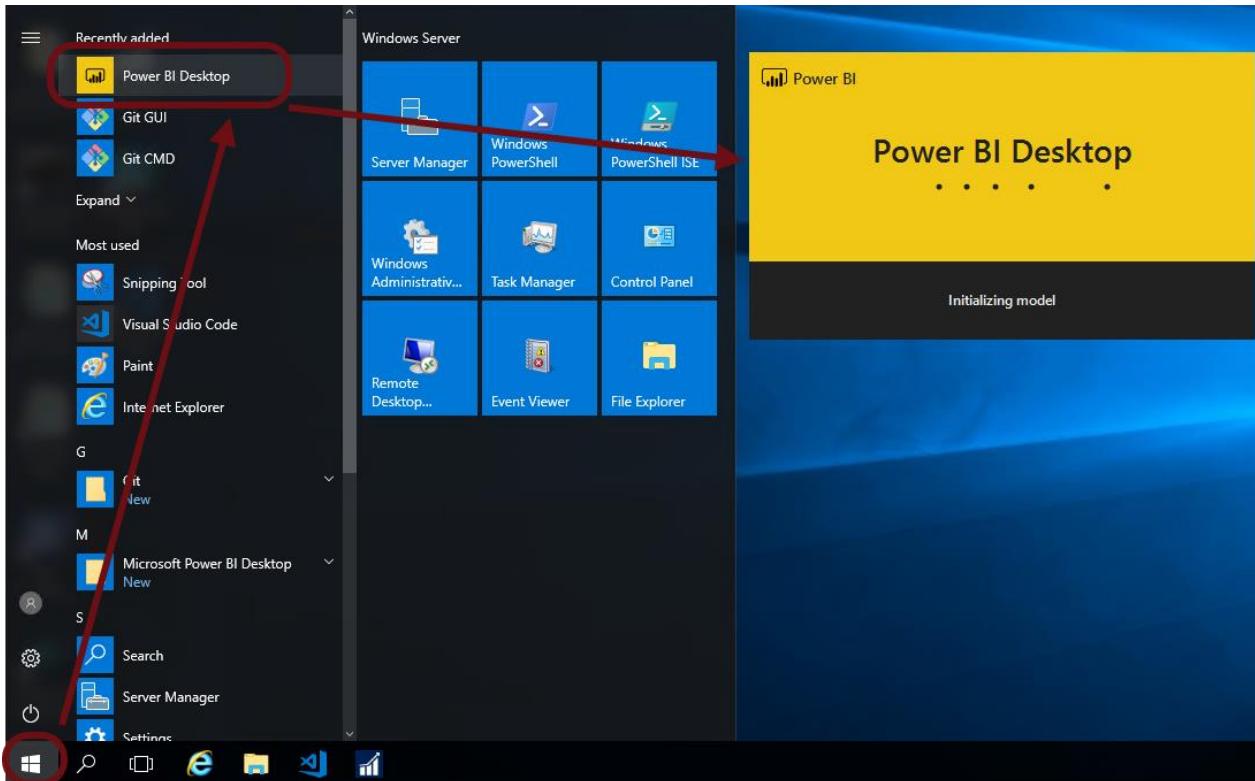
To test that it works, paste it into your browser:



Import the ODATA queries in Power BI Desktop

Now that our queries have been published as ODATA web services and we know the URL on how to reach them, we are ready to create a report in Power BI Desktop.

Launch Power BI Desktop:



Select the Sign In link and enter your email and password you used when registering on the Power BI website:

Welcome to Power BI Desktop

Where can we send you the latest tips and tricks for Power BI?

First Name *

Last Name *

Email Address *

Enter your phone number *

Country/region *

Company name *

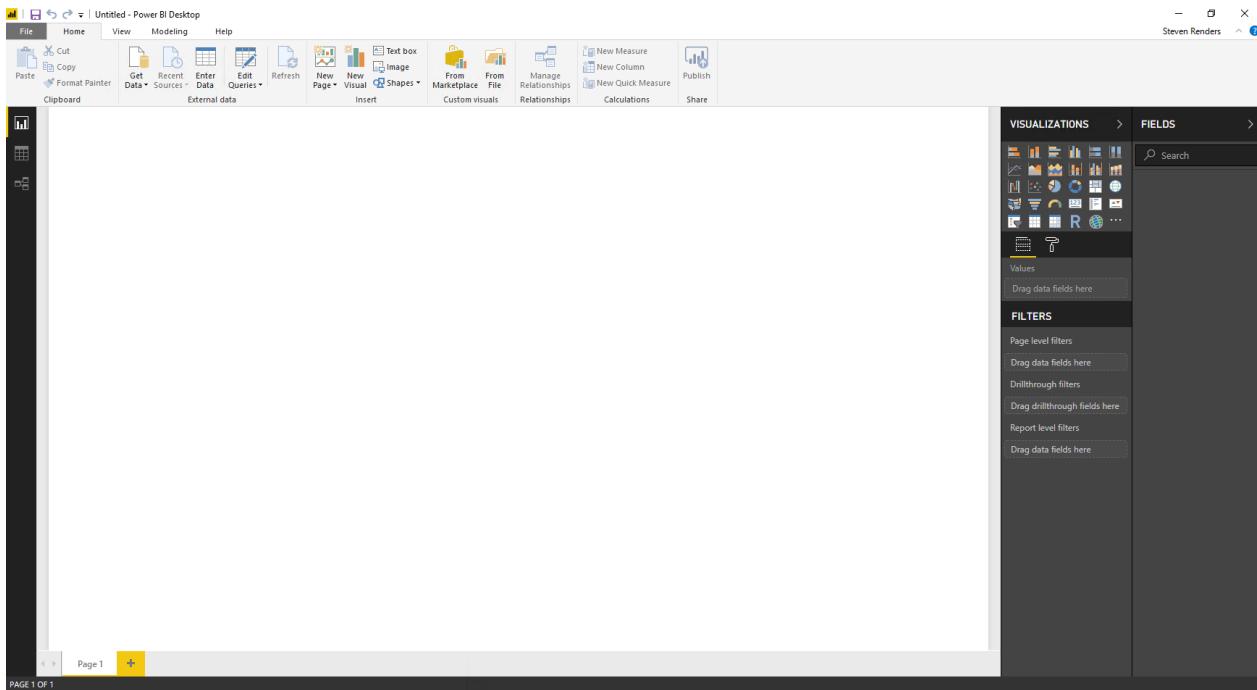
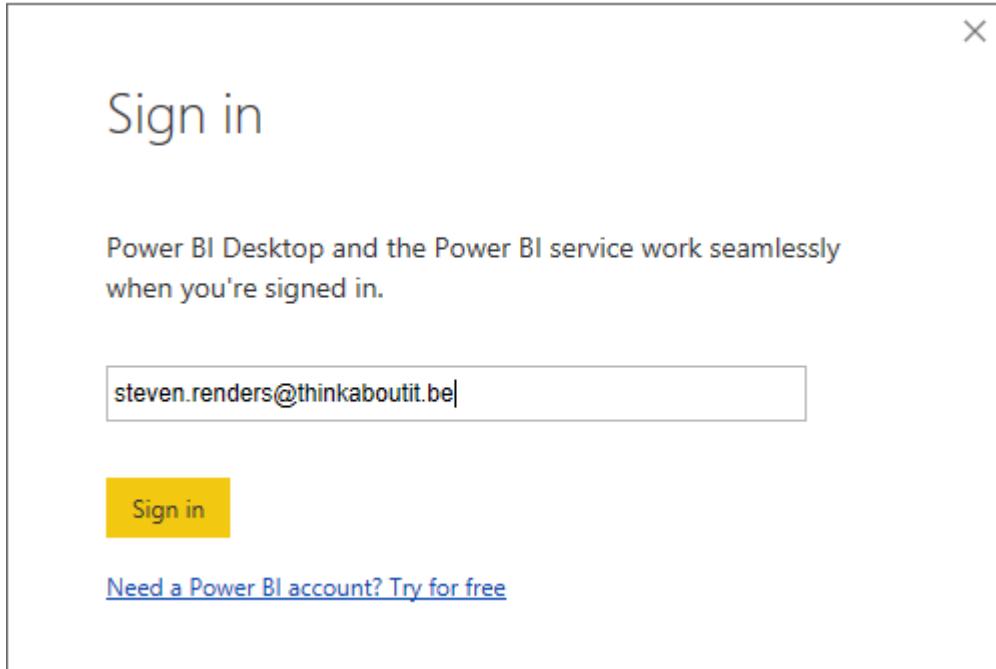
Job Role*

Microsoft may use your contact information to provide updates and special offers about Business Intelligence and other Microsoft products and services. You can unsubscribe at any time. To learn more you can read the [privacy statement](#).

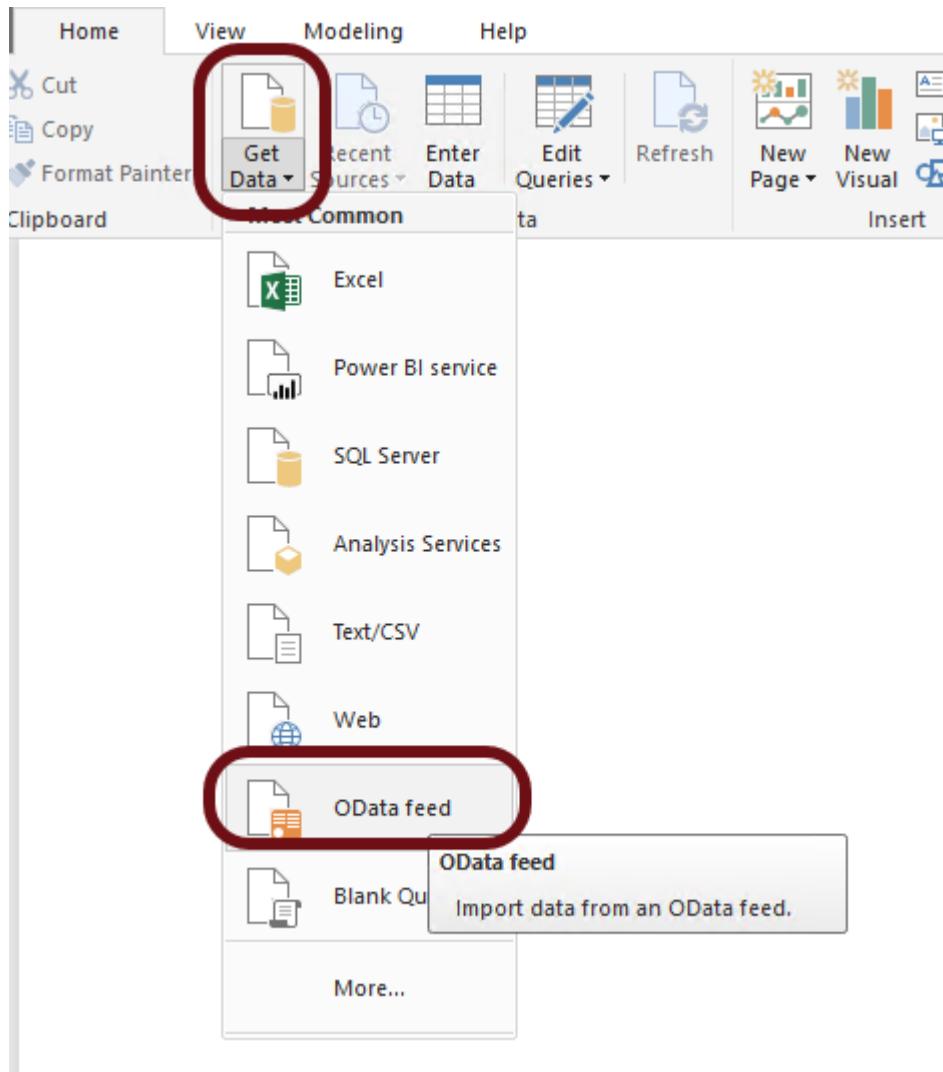
Done

[Already have a Power BI account? Sign in](#)

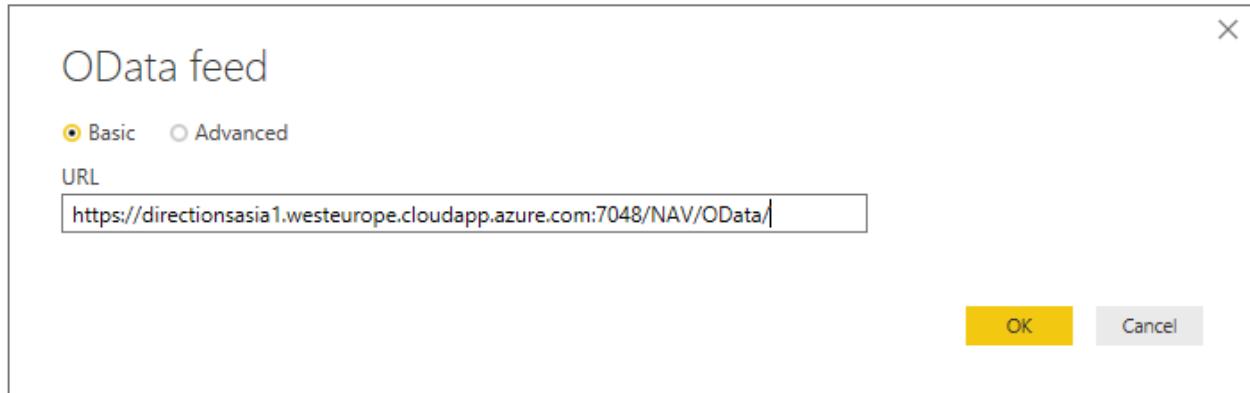




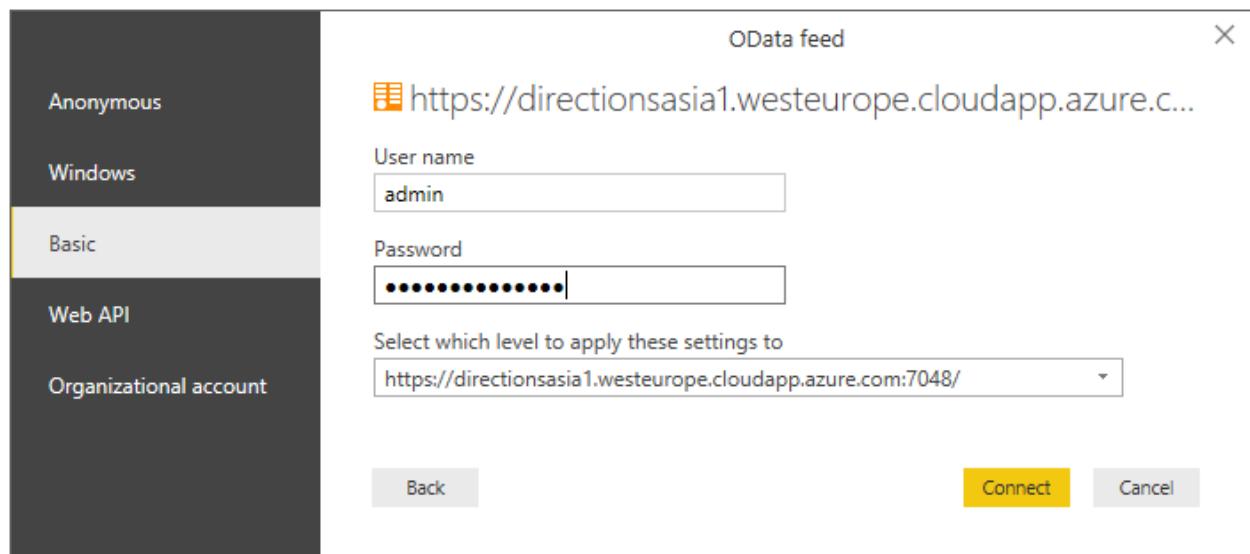
Now select Get Data, ODATA Feed:



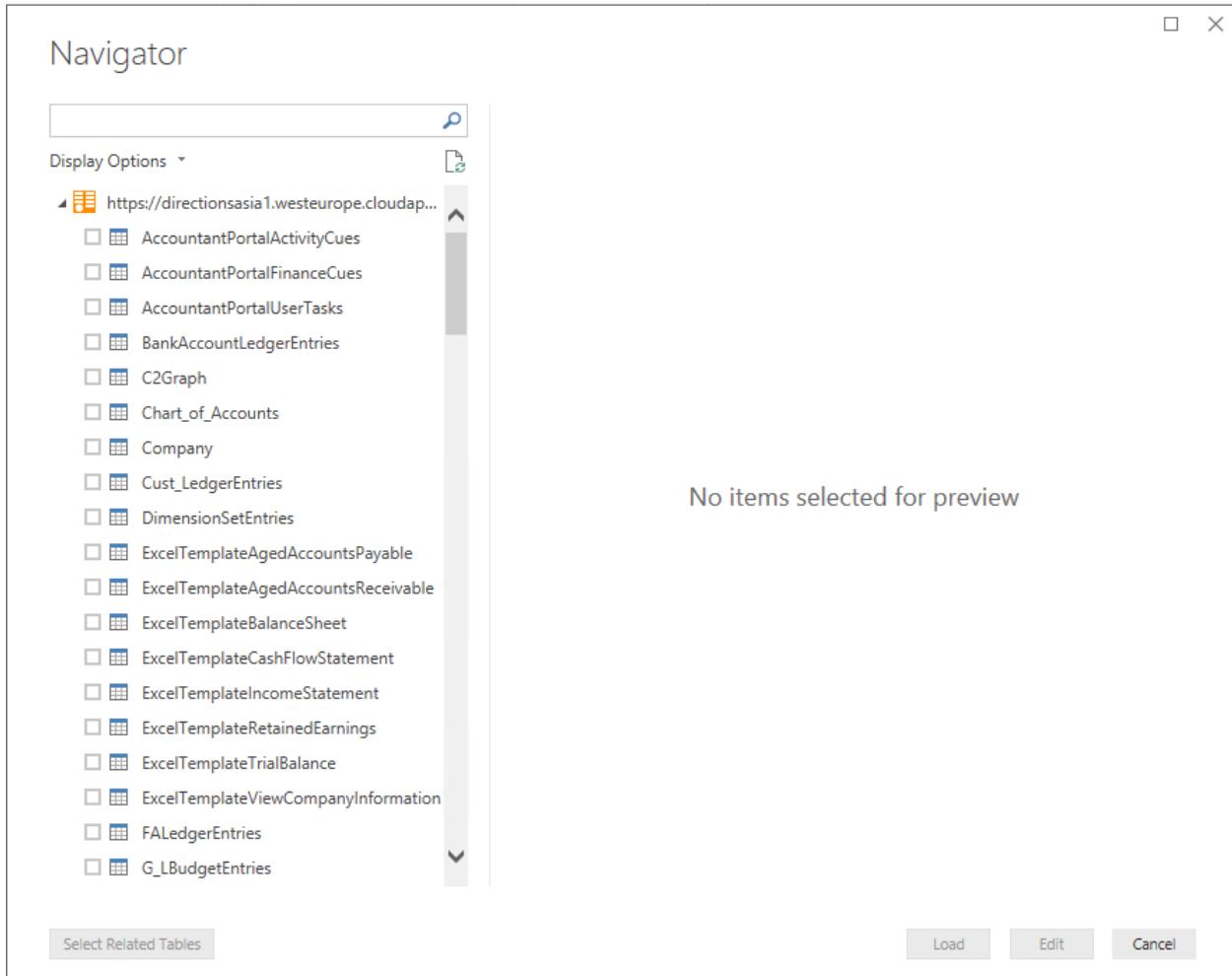
In the popup window, paste the ODATA Url:



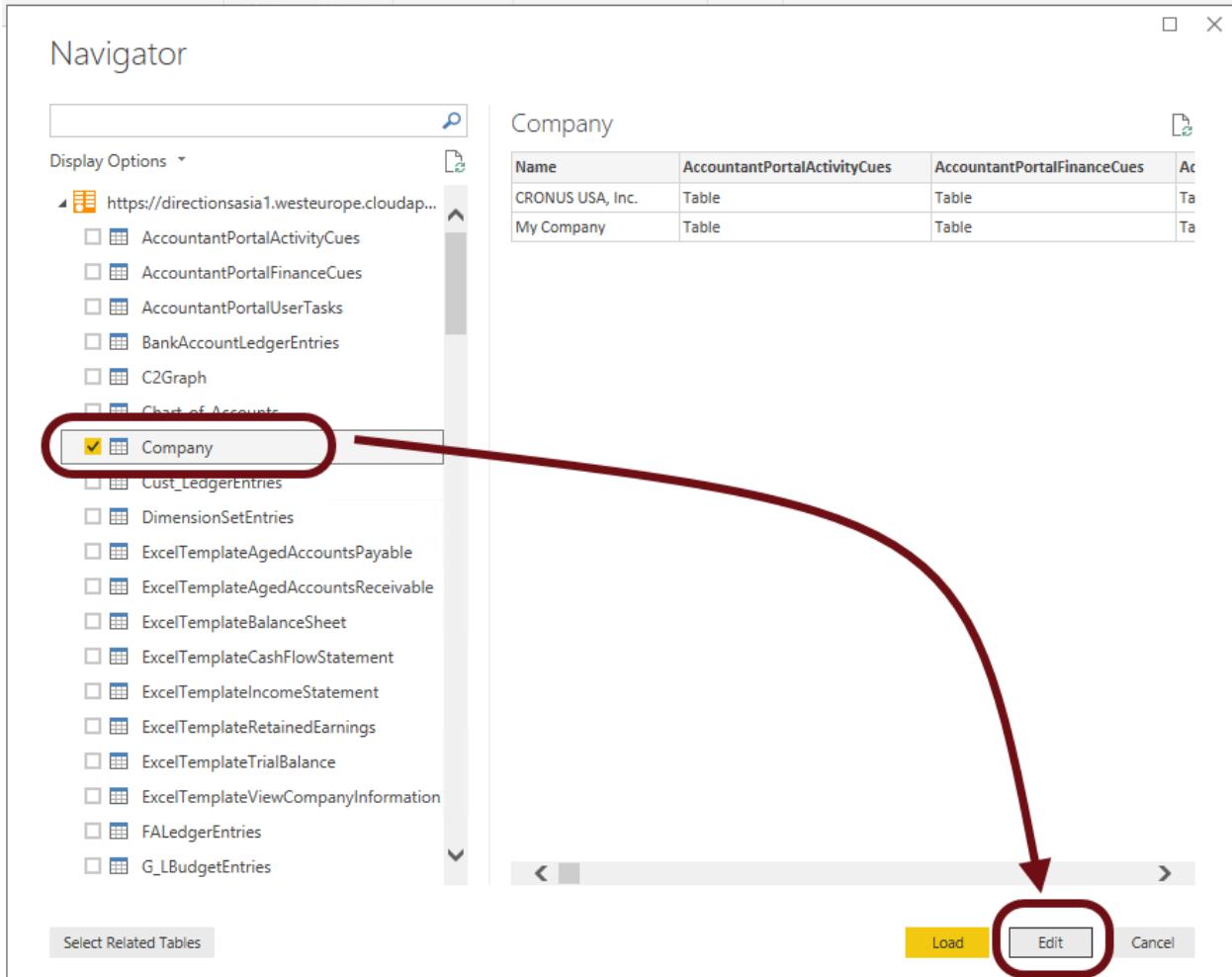
Then enter your credentials. Select Basic:



Select Connect and the following window opens:

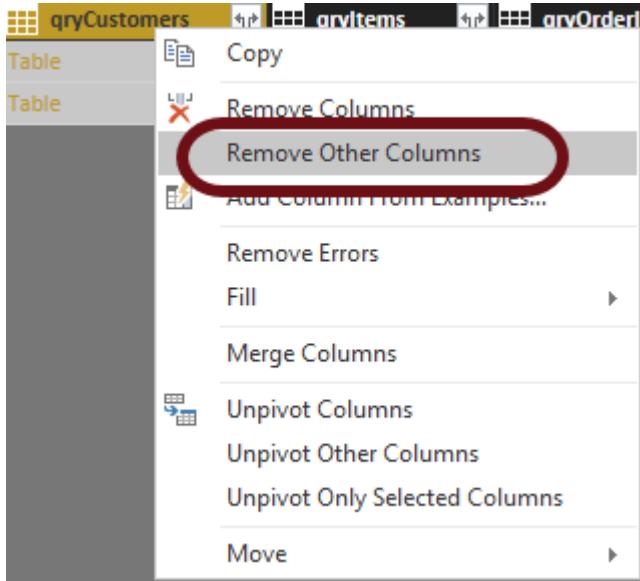


Then in the Navigator, select Company and click Edit:



The Query Editor opens:

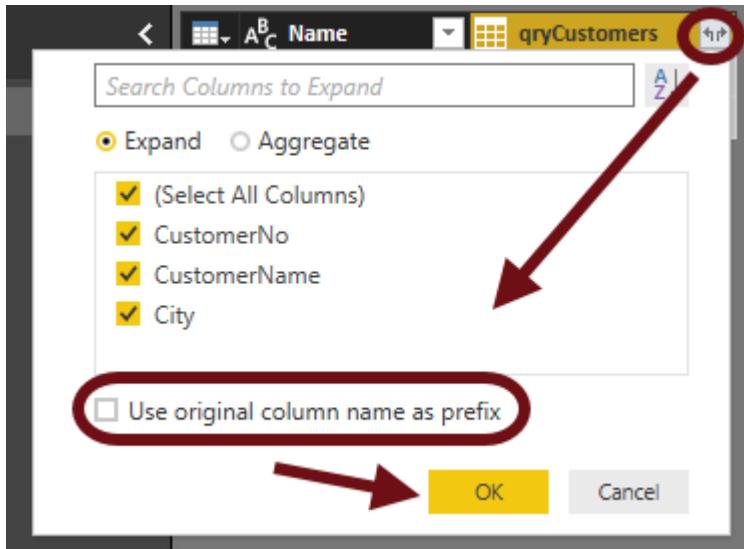
Using the Ctrl button, select the first column (Name) and the column named qryCustomers. Then right click and select Remove Other Columns:



This results in the following:

The screenshot shows the Power Query Editor interface. The 'qryCustomers' query is selected in the 'Queries [1]' list. The 'APPLIED STEPS' pane on the right side of the screen displays one step: 'Removed Other Columns'.

Now expand the qryCustomers:



De-select the option 'Use original column name as prefix. Then click OK:

	A ^B _C Name	A ^B _C CustomerNo	A ^B _C CustomerName	A ^B _C City
1	CRONUS USA, Inc.	10000	Adatum Corporation	Atlanta
2	CRONUS USA, Inc.	20000	Trey Research	Chicago
3	CRONUS USA, Inc.	30000	School of Fine Art	Miami
4	CRONUS USA, Inc.	40000	Alpine Ski House	Atlanta
5	CRONUS USA, Inc.	50000	Relecloud	Atlanta
6	My Company	null	null	null

Rename the first column into Company:

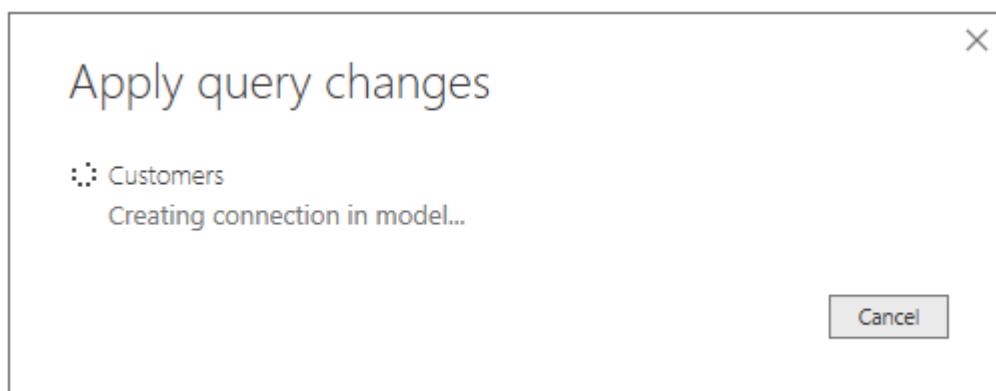
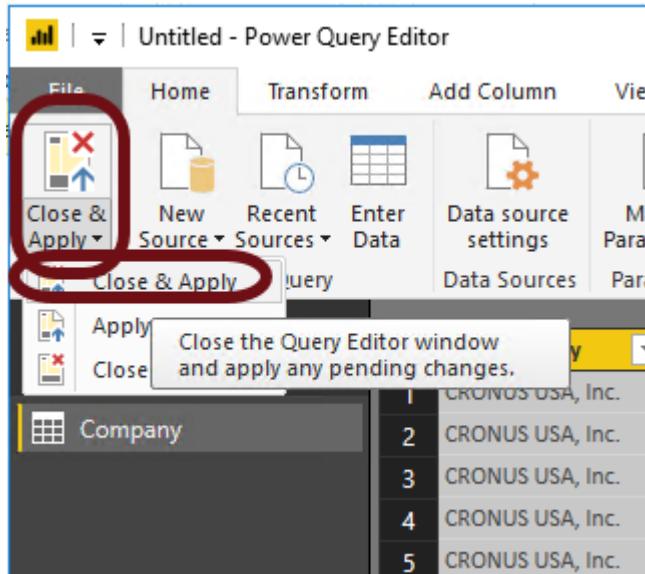
The screenshot shows two windows. On the left, a context menu is open over the 'Name' column header in a table. The menu items include Copy, Remove, Remove Other Columns, Duplicate Column, Add Column From Examples..., Remove Duplicates, Remove Errors, Change Type, Transform, Replace Values..., Replace Errors..., Split Column, Group By..., Fill, Unpivot Columns, Unpivot Other Columns, Hide/Unhide Selected Columns, Rename..., Move, Drill Down, and Add as New Query. The 'Rename...' option is highlighted with a red oval. On the right, the Power BI query editor displays a table with columns: Company, CustomerNo, CustomerName, and City. The 'Company' column header is highlighted with a yellow box. The table data is as follows:

	Company	CustomerNo	CustomerName	City
1	CRONUS USA, Inc.	10000	Adatum Corporation	Atlanta
2	CRONUS USA, Inc.	20000	Trey Research	Chicago
3	CRONUS USA, Inc.	30000	School of Fine Art	Miami
4	CRONUS USA, Inc.	40000	Alpine Ski House	Atlanta
5	CRONUS USA, Inc.	50000	Relecloud	Atlanta
6	My Company	null	null	null

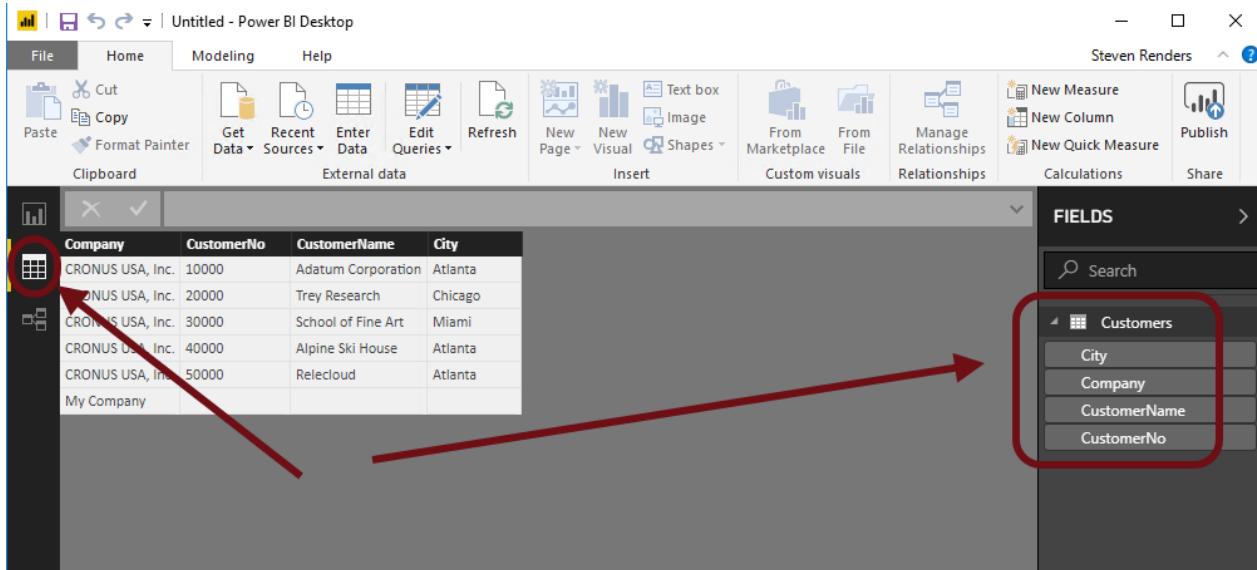
Then rename the query to Customers:

The screenshot shows the Power BI query editor with the same table data. On the right, the 'QUERY SETTINGS' pane is open. The 'PROPERTIES' section shows the 'Name' field set to 'Customers'. The 'APPLIED STEPS' section lists the following steps: Source, Navigation, Removed Other Columns, Expanded qryCustomers, and Renamed Columns. An arrow points from the 'Customers' text in the properties pane to the 'Name' field.

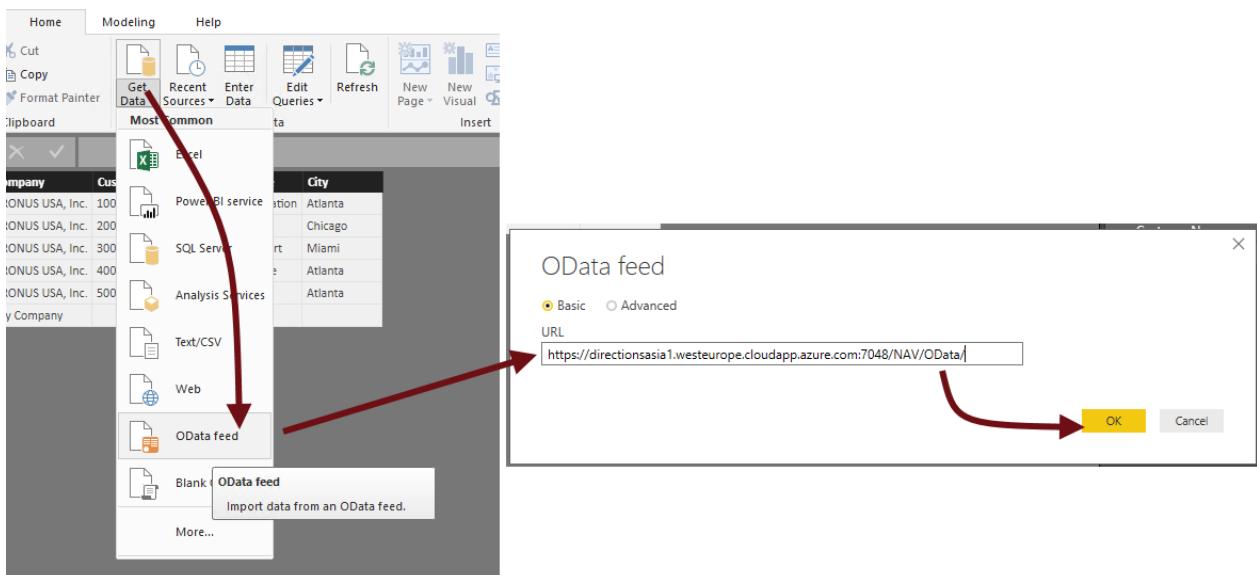
Then select Close & Apply:



When you then select the Table button, you should see something like this:



We will now also import the qryItems and qryOrderIntake in the same way:



Navigator

Display Options

https://directionsasia1.westeurope.cloudapp.azure.com/

- AccountantPortalActivityCues
- AccountantPortalFinanceCues
- AccountantPortalUserTasks
- BankAccountLedgerEntries
- C2Graph
- Chart_of_Accounts
 - Company
 - Cust_LedgerEntries
- DimensionSetEntries
- ExcelTemplateAgedAccountsPayable
- ExcelTemplateAgedAccountsReceivable
- ExcelTemplateBalanceSheet
- ExcelTemplateCashFlowStatement
- ExcelTemplateIncomeStatement
- ExcelTemplateRetainedEarnings
- ExcelTemplateTrialBalance
- ExcelTemplateViewCompanyInformation
- FALedgerEntries
- G_LBudgetEntries

Select Related Tables

Load Cancel

qryCustomers

qryItems

Table

Table

Copy

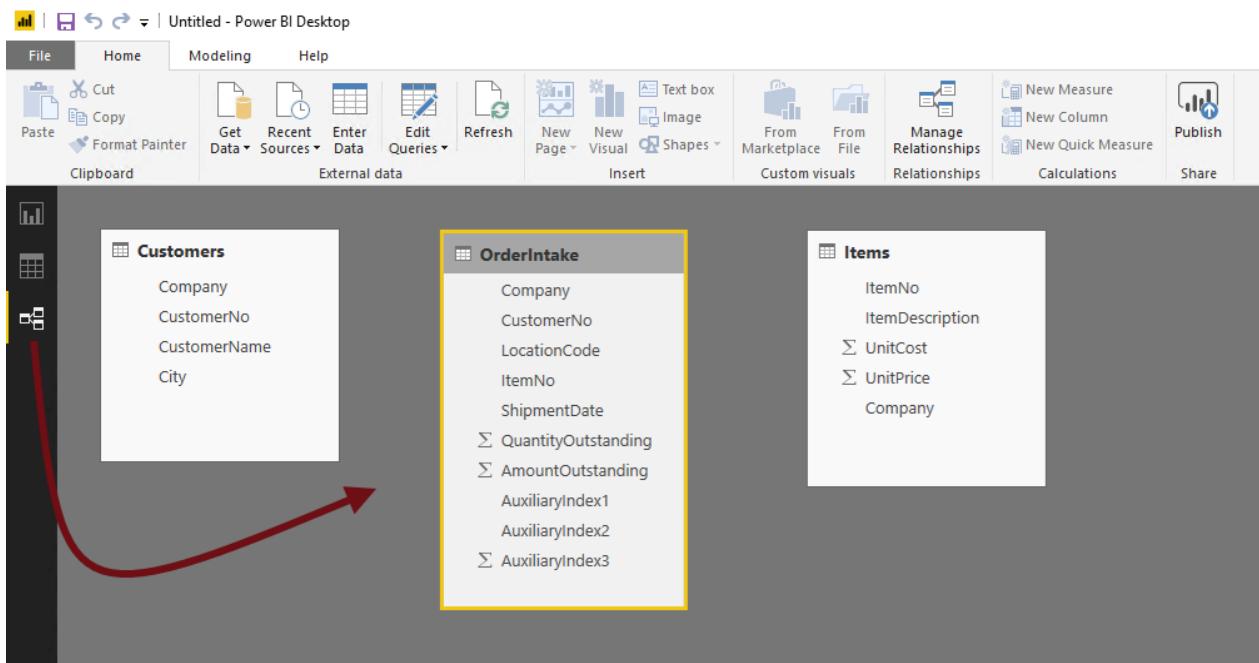
- Remove Columns
- Remove Other Columns
- Add Column From Examples...
- Remove Errors
- Fill
- Merge Columns
- Unpivot Columns
- Unpivot Other Columns
- Unpivot Only Selected Columns
- Move

	qryItems	Name
1	Table	CRONUS USA, Inc.
2	Table	My Company

The screenshot shows the Power BI Desktop interface. On the left is a query editor displaying a table with 19 rows and columns for ItemNo, ItemDescription, UnitCost, UnitPrice, and Company. On the right is a 'QUERY SETTINGS' pane. The 'PROPERTIES' section has a 'Name' field set to 'Items'. The 'APPLIED STEPS' section is highlighted with a red box and contains steps for Source, Navigation, Removed Other Columns, Renamed Columns, and Expanded qlyItems.

	ItemNo	ItemDescription	UnitCost	UnitPrice	Company
1	1896-S	ATHENS Desk	780.7	1000.8	CRONUS USA, Inc.
2	1900-S	PARIS Guest Chair, black	150.3	192.8	CRONUS USA, Inc.
3	1906-S	ATHENS Mobile Pedestal	338.2	433.6	CRONUS USA, Inc.
4	1908-S	LONDON Swivel Chair, blue	148.1	190.1	CRONUS USA, Inc.
5	1920-S	ANTWERP Conference Table	505.4	647.8	CRONUS USA, Inc.
6	1925-W	Conference Bundle 1-6	0	188.8	CRONUS USA, Inc.
7	1928-S	AMSTERDAM Lamp	42.8	54.9	CRONUS USA, Inc.
8	1929-W	Conference Bundle 1-8	0	233.8	CRONUS USA, Inc.
9	1936-S	BERLIN Guest Chair, yellow	150.3	192.8	CRONUS USA, Inc.
10	1953-W	Guest Section 1	0	125.8	CRONUS USA, Inc.
11	1960-S	ROME Guest Chair, green	150.3	192.8	CRONUS USA, Inc.
12	1964-S	TOKYO Guest Chair, blue	150.3	192.8	CRONUS USA, Inc.
13	1965-W	Conference Bundle 2-8	0	233.8	CRONUS USA, Inc.
14	1968-S	MEXICO Swivel Chair, black	148.1	190.1	CRONUS USA, Inc.
15	1969-W	Conference Package 1	0	341.8	CRONUS USA, Inc.
16	1972-S	MUNICH Swivel Chair, yellow	148.1	190.1	CRONUS USA, Inc.
17	1980-S	MOSCOW Swivel Chair, red	148.1	190.1	CRONUS USA, Inc.
18	1988-S	SEOUL Guest Chair, red	150.3	192.8	CRONUS USA, Inc.
19	1996-S	ATLANTA Whiteboard, base	1089.9	1397.3	CRONUS USA, Inc.

This should be the result, in the relations tab:

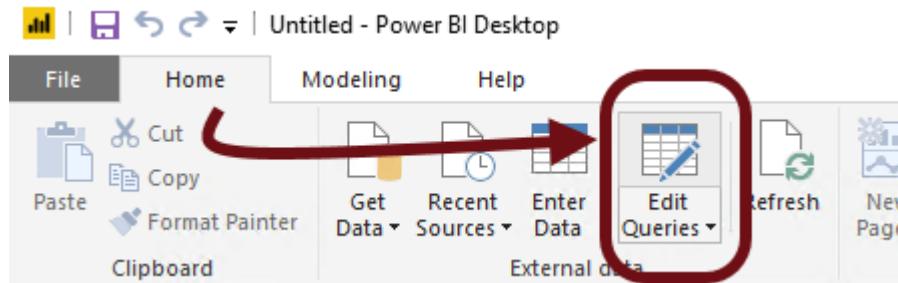


Create the Data Model and relations

In order to create relations between the tables, we need unique keys in each table. For example, if you would use the CustomerNo field from the Customers table and link it to the CustomerNo field of the OrderIntake table it might work right now, because there's only one company in our database. But as soon as there are more companies in the database this will not work anymore.

Therefore, we will add unique keys to each table, so we can use them to create table relationships.

Open the Query Editor:

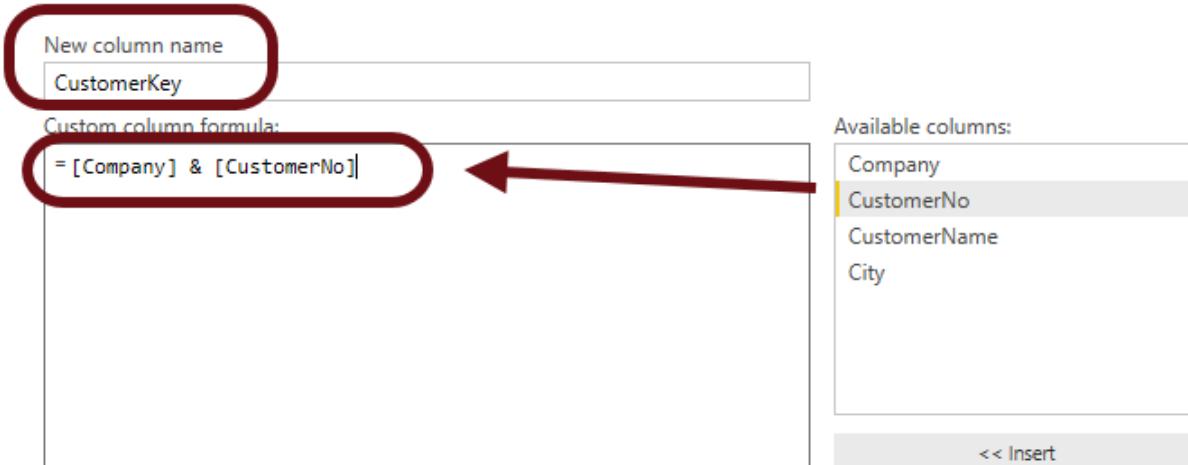


Then in the Customers table, select Add Column, Custom Column:

		A ^B _C CustomerNo	A ^B _C CustomerName	A ^B _C City
1	Inc.	10000	Adatum Corporation	Atlanta
2	CRONUS USA, Inc.	20000	Trey Research	Chicago
3	CRONUS USA, Inc.	30000	School of Fine Art	Miami
4	CRONUS USA, Inc.	40000	Alpine Ski House	Atlanta
5	CRONUS USA, Inc.	50000	Relecloud	Atlanta
6	My Company	null	null	null

Type CustomerKey as the column name and use the following formula to concatenate Company and CustomerNo:

Custom Column



[Learn about Power BI Desktop formulas](#)

✓ No syntax errors have been detected.

OK

Cancel

Click OK:

Untitled - Power Query Editor

File Home Transform Add Column View Help

Queries [3]

	Company	CustomerNo	CustomerName	City	CustomerKey
1	CRONUS USA, Inc.	10000	Adatum Corporation	Atlanta	CRONUS USA, Inc.10000
2	CRONUS USA, Inc.	20000	Trey Research	Chicago	CRONUS USA, Inc.20000
3	CRONUS USA, Inc.	30000	School of Fine Art	Miami	CRONUS USA, Inc.30000
4	CRONUS USA, Inc.	40000	Alpine Ski House	Atlanta	CRONUS USA, Inc.40000
5	CRONUS USA, Inc.	50000	Relecloud	Atlanta	CRONUS USA, Inc.50000
6	My Company	null	null	null	null

QUERY SETTINGS

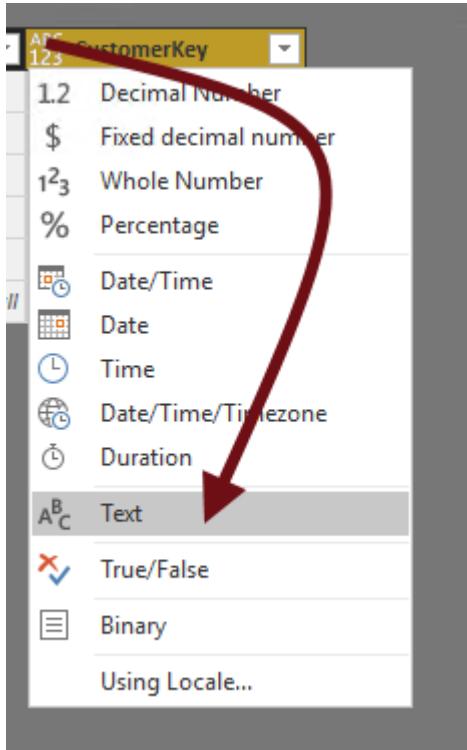
Properties

Name: Customers

Applied Steps

- Source
- Navigation
- Removed Other Columns
- Expanded qryCustomers
- Renamed Columns
- Added Custom

Change the datatype of the new column to Text:



In a similar way, add a new column named ItemKey to the Item table:

Custom Column

New column name

ItemKey

Custom column formula:

= [Company] & [ItemNo]

Available columns:

ItemNo
ItemDescription
UnitCost
UnitPrice
Company

<< Insert

[Learn about Power BI Desktop formulas](#)

✓ No syntax errors have been detected.

OK

Cancel

Untitled - Power Query Editor

File Home Transform Add Column View Help

Column From Examples | Custom Column | Invoke Custom Function | Conditional Column | Index Column | Duplicate Column | General

Merge Columns | ABC Extract | ABC Parse | Format | Statistics | Standard | Scientific | Rounding | Trigonometry | Date | Time | Duration | From Text | From Number | From Date & Time | Information

Queries [3]

itemNo	A ^B ItemDescription	1.2 UnitCost	1.2 UnitPrice	A ^B Company	A ^B ItemKey
1-S	ATHENS Desk	780.7	1000.8	CRONUS USA, Inc.	CRONUS USA, Inc.1896-S
2-S	PARIS Guest Chair, black	150.3	192.8	CRONUS USA, Inc.	CRONUS USA, Inc.1900-S
3-S	ATHENS Mobile Pedestal	338.2	433.6	CRONUS USA, Inc.	CRONUS USA, Inc.1906-S
4-S	LONDON Swivel Chair, blue	148.1	190.1	CRONUS USA, Inc.	CRONUS USA, Inc.1908-S
5-S	ANTWERP Conference Table	505.4	647.8	CRONUS USA, Inc.	CRONUS USA, Inc.1920-S
6-W	Conference Bundle 1-6	0	188.8	CRONUS USA, Inc.	CRONUS USA, Inc.1925-W
7-S	AMSTERDAM Lamp	42.8	54.9	CRONUS USA, Inc.	CRONUS USA, Inc.1928-S
8-W	Conference Bundle 1-8	0	233.8	CRONUS USA, Inc.	CRONUS USA, Inc.1929-W
9-S	BERLIN Guest Chair, yellow	150.3	192.8	CRONUS USA, Inc.	CRONUS USA, Inc.1936-S
10-W	Guest Section 1	0	125.8	CRONUS USA, Inc.	CRONUS USA, Inc.1953-W
11-S	ROME Guest Chair, green	150.3	192.8	CRONUS USA, Inc.	CRONUS USA, Inc.1960-S
12-S	TOKYO Guest Chair, blue	150.3	192.8	CRONUS USA, Inc.	CRONUS USA, Inc.1964-S
13-W	Conference Bundle 2-8	0	233.8	CRONUS USA, Inc.	CRONUS USA, Inc.1965-W
14-S	MEXICO Swivel Chair, black	148.1	190.1	CRONUS USA, Inc.	CRONUS USA, Inc.1968-S
15-W	Conference Package 1	0	341.8	CRONUS USA, Inc.	CRONUS USA, Inc.1969-W
16-S	MUNICH Swivel Chair, yellow	148.1	190.1	CRONUS USA, Inc.	CRONUS USA, Inc.1972-S
17-S	MOSCOW Swivel Chair, red	148.1	190.1	CRONUS USA, Inc.	CRONUS USA, Inc.1980-S

QUERY SETTINGS

Properties

Name: Items

All Properties

Applied Steps

- Source
- Navigation
- Removed Other Columns
- Renamed Columns
- Expanded qryItems
- Added Custom
- Changed Type

Then in the OrderIntake table add two new columns: CustomerKey and ItemKey:

The screenshot shows the Power Query Editor interface with the 'OrderIntake' query selected in the Queries list. The 'CustomerKey' column is highlighted with a red oval. The 'APPLIED STEPS' pane on the right shows the step 'Added Custom1' has been added.

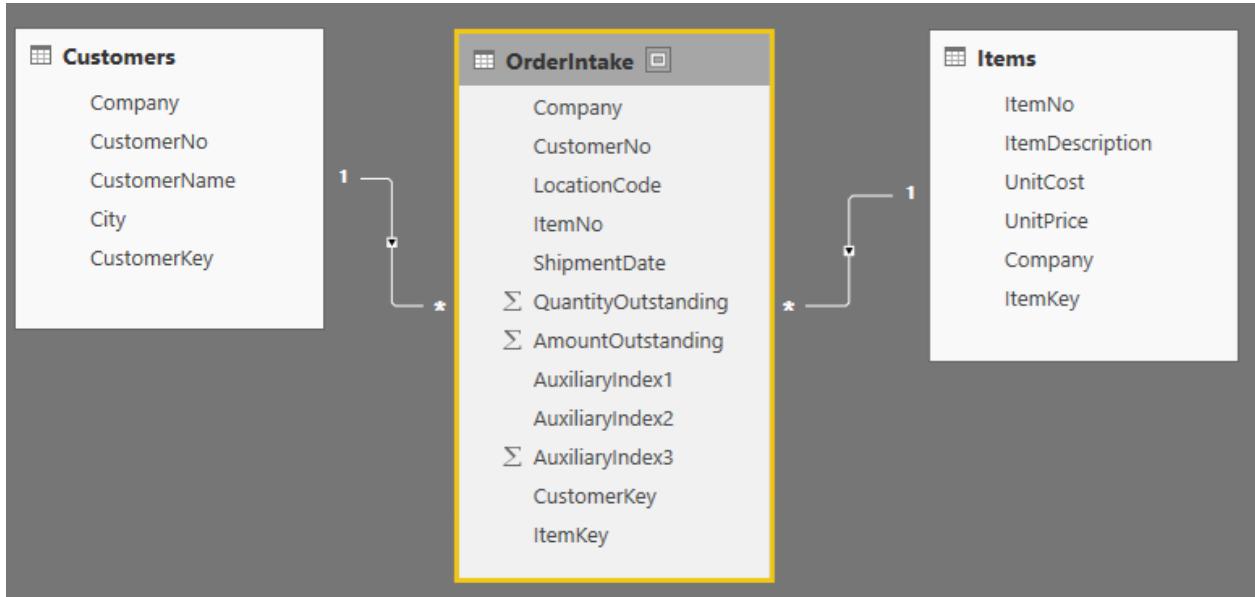
	AuxiliaryIndex1	AuxiliaryIndex2	AuxiliaryIndex3	CustomerKey	ItemKey
1	Quote	S-QUO1001	1000	CRONUS USA, Inc.20000	CRONUS USA, Inc.1936-S
2	Quote	S-QUO1002	1000	CRONUS USA, Inc.40000	CRONUS USA, Inc.2000-S
3	Order	S-ORD101001	1000	CRONUS USA, Inc.10000	CRONUS USA, Inc.1996-S
4	Order	S-ORD101002	1000	CRONUS USA, Inc.10000	CRONUS USA, Inc.1968-S
5	Order	S-ORD101002	2000	CRONUS USA, Inc.10000	CRONUS USA, Inc.1928-S
6	Order	S-ORD101003	1000	CRONUS USA, Inc.30000	CRONUS USA, Inc.1920-S
7	Order	S-ORD101004	1000	CRONUS USA, Inc.40000	CRONUS USA, Inc.2000-S
8	Invoice	S-INV102199	1000	CRONUS USA, Inc.10000	CRONUS USA, Inc.1968-S
9	Invoice	S-INV102199	2000	CRONUS USA, Inc.10000	CRONUS USA, Inc.1996-S
10	Invoice	S-INV102199	3000	CRONUS USA, Inc.	CRONUS USA, Inc.
11	Invoice	S-INV102200	1000	CRONUS USA, Inc.10000	CRONUS USA, Inc.2000-S
12	Invoice	S-INV102200	2000	CRONUS USA, Inc.10000	CRONUS USA, Inc.1996-S
13	Invoice	S-INV102201	1000	CRONUS USA, Inc.20000	CRONUS USA, Inc.1896-S
14	Invoice	S-INV102201	2000	CRONUS USA, Inc.20000	CRONUS USA, Inc.40100
15	Invoice	S-INV102202	1000	CRONUS USA, Inc.30000	CRONUS USA, Inc.1920-S
16	Invoice	S-INV102203	1000	CRONUS USA, Inc.30000	CRONUS USA, Inc.1920-S
17	Invoice	S-INV102204	1000	CRONUS USA, Inc.40000	CRONUS USA, Inc.1928-S
18	Invoice	S-INV102205	1000	CRONUS USA, Inc.50000	CRONUS USA, Inc.1920-S
19	Invoice	S-INV102205	2000	CRONUS USA, Inc.50000	CRONUS USA, Inc.1936-S
20		null	null	null	null

Now select Close & Apply:

In the relationships window you now see the added columns:

The screenshot shows the Relationships window with three tables: Customers, OrderIntake, and Items. The OrderIntake table is highlighted with a yellow border. The 'CustomerKey' and 'ItemKey' columns are highlighted with red ovals.

You can use these to create relationships between the tables:



To create the relationships simply drag a field from one table to another, for example the CustomerKey from the Customers table on the CustomerKey of the OrderIntake table.

As an alternative, you could also use the Manage Relationships button:

The screenshot shows the Microsoft Power BI ribbon interface. The 'Manage Relationships' button in the 'Relationships' section of the ribbon is highlighted with a red circle and a red arrow points from it to the corresponding table in the 'Manage relationships' dialog box.

Ribbon Buttons:

- External data: Enter Data, Edit Queries, Refresh
- Insert: New Page, New Visual, Text box, Image, Shapes, From Marketplace, From File, Custom visuals
- Relationships: Manage Relationships, Calculations, New Measure, New Column, New Quick Measure, Publish, Share

Manage relationships Dialog Box:

Table Data:

Active	From: Table (Column)	To: Table (Column)
<input checked="" type="checkbox"/>	OrderIntake (CustomerKey)	Customers (CustomerKey)
<input checked="" type="checkbox"/>	OrderIntake (ItemKey)	Items (ItemKey)

Buttons:

- New..., Autodetect..., Edit..., Delete
- Close

Enrich the Data Model with DAX

In order to perform calculations or create KPI's we will now add some measures to the data model.

In the OrderIntake table, select the Modeling tab and click New Measure:

The screenshot shows the Power BI Desktop interface with the 'Modeling' tab selected. In the 'FIELDS' pane on the right, the 'OrderIntake' table is highlighted with a red circle. A red arrow points from this circle to the 'New Measure' button in the ribbon bar.

ItemNo	ShipmentDate	QuantityOutstanding	AmountOutstanding	AuxiliaryIndex1	AuxiliaryIndex2	Auxiliary
CRONUS USA, Inc. 20000	1936-S	2/20/2018 12:00:00 AM	10	2024.4	Quote	S-QUO100
CRONUS USA, Inc. 40000	2000-S	2/20/2018 12:00:00 AM	5	1017.04	Quote	S-QUO1002
CRONUS USA, Inc. 10000	1996-S	4/2/2018 12:00:00 AM	12	17773.66	Order	S-ORD101001
CRONUS USA, Inc. 10000	1968-S	5/1/2018 12:00:00 AM	10	2015.06	Order	S-ORD101002
CRONUS USA, Inc. 10000	1928-S	5/1/2018 12:00:00 AM	7	407.36	Order	S-ORD101002
CRONUS USA, Inc. 30000	1920-S	4/2/2018 12:00:00 AM	8	5545.17	Order	S-ORD101003
CRONUS USA, Inc. 40000	2000-S	5/13/2018 12:00:00 AM	3	610.22	Order	S-ORD101004
CRONUS USA, Inc. 10000	1968-S	2/20/2018 12:00:00 AM	5	1007.53	Invoice	S-INV102199
CRONUS USA, Inc. 10000	1996-S	2/20/2018 12:00:00 AM	7	10367.97	Invoice	S-INV102199
CRONUS USA, Inc. 10000	2000-S	2/20/2018 12:00:00 AM	2	403.01	Invoice	S-INV102200
CRONUS USA, Inc. 10000	1996-S	2/20/2018 12:00:00 AM	5	7405.69	Invoice	S-INV102200
CRONUS USA, Inc. 20000	1896-S	2/20/2018 12:00:00 AM	1	1050.84	Invoice	S-INV102201
CRONUS USA, Inc. 20000	40100	2/20/2018 12:00:00 AM	1	970	Invoice	S-INV102201
CRONUS USA, Inc. 30000	1920-S	2/20/2018 12:00:00 AM	4	2772.58	Invoice	S-INV102202
CRONUS USA, Inc. 30000	1920-S	2/20/2018 12:00:00 AM	10	6931.46	Invoice	S-INV102203
CRONUS USA, Inc. 40000	1928-S	2/20/2018 12:00:00 AM	5	293.72	Invoice	S-INV102204
CRONUS USA, Inc. 50000	1920-S	2/20/2018 12:00:00 AM	4	2746.67	Invoice	S-INV102205
CRONUS USA, Inc. 50000	1936-S	2/20/2018 12:00:00 AM	23	4700.46	Invoice	S-INV102205

Use the following formula:

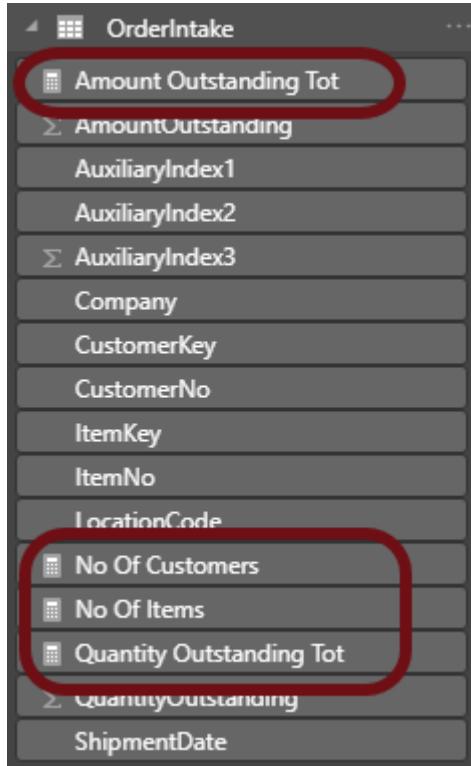
- **No Of Customers = DISTINCTCOUNT(OrderIntake[CustomerKey])**

The screenshot shows the Power BI Desktop interface with the 'Modeling' tab selected. In the formula bar, the measure 'No Of Customers = DISTINCTCOUNT(OrderIntake[CustomerKey])' is displayed. A red box highlights this formula. A red arrow points from the formula bar to the 'FIELDS' pane on the right, where the measure 'No Of Customers' is listed and circled in yellow.

Company	CustomerNo	LocationCode	ItemNo	ShipmentDate	QuantityOutstanding	AmountOutstanding	AuxiliaryIndex1	AuxiliaryIndex2	AuxiliaryIndex3
CRONUS USA, Inc.	20000		1936-S	2/20/2018 12:00:00 AM	10	2024.4	Quote	S-QUO1001	
CRONUS USA, Inc.	40000		2000-S	2/20/2018 12:00:00 AM	5	1017.04	Quote	S-QUO1002	
CRONUS USA, Inc.	10000		1996-S	4/2/2018 12:00:00 AM	12	17773.66	Order	S-ORD101001	
CRONUS USA, Inc.	10000		1968-S	5/1/2018 12:00:00 AM	10	2015.06	Order	S-ORD101002	
CRONUS USA, Inc.	10000		1928-S	5/1/2018 12:00:00 AM	7	407.36	Order	S-ORD101002	
CRONUS USA, Inc.	30000		1920-S	4/22/2018 12:00:00 AM	8	5545.17	Order	S-ORD101003	
CRONUS USA, Inc.	40000		2000-S	5/13/2018 12:00:00 AM	3	610.22	Order	S-ORD101004	
CRONUS USA, Inc.	10000		1968-S	2/20/2018 12:00:00 AM	5	1007.53	Invoice	S-INV102199	
CRONUS USA, Inc.	10000		1996-S	2/20/2018 12:00:00 AM	7	10367.97	Invoice	S-INV102199	
CRONUS USA, Inc.	10000		2000-S	2/20/2018 12:00:00 AM	2	403.01	Invoice	S-INV102200	
CRONUS USA, Inc.	10000		1996-S	2/20/2018 12:00:00 AM	1	7405.69	Invoice	S-INV102200	
CRONUS USA, Inc.	20000		1896-S	2/20/2018 12:00:00 AM	1	1050.84	Invoice	S-INV102201	
CRONUS USA, Inc.	20000		40100	2/20/2018 12:00:00 AM	1	970	Invoice	S-INV102201	
CRONUS USA, Inc.	30000		1920-S	2/20/2018 12:00:00 AM	4	274.58	Invoice	S-INV102202	
CRONUS USA, Inc.	30000		1920-S	2/20/2018 12:00:00 AM	10	6931.46	Invoice	S-INV102203	
CRONUS USA, Inc.	40000		1928-S	2/20/2018 12:00:00 AM	5	293.72	Invoice	S-INV102204	
CRONUS USA, Inc.	50000		1920-S	2/20/2018 12:00:00 AM	4	2746.67	Invoice	S-INV102205	
CRONUS USA, Inc.	50000		1936-S	2/20/2018 12:00:00 AM	23	4700.46	Invoice	S-INV102205	

Similarly, also add the following measures to the OrderIntake table:

- **No Of Items = DISTINCTCOUNT(OrderIntake[ItemKey])**
- **Quantity Outstanding Tot = sum(OrderIntake[QuantityOutstanding])**
- **Amount Outstanding Tot = sum(OrderIntake[AmountOutstanding])**

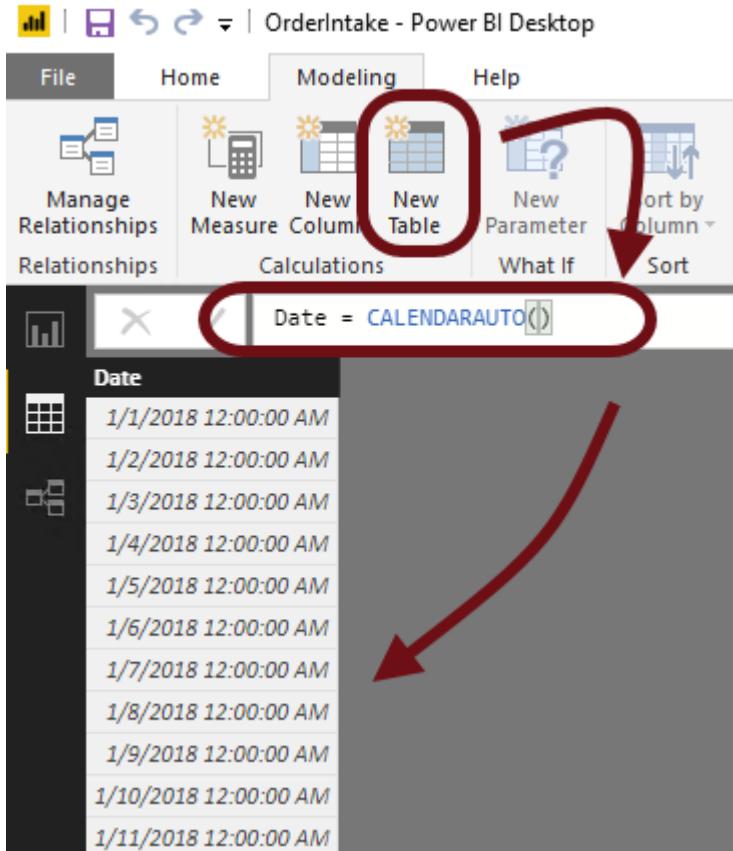


Now we will also add a Date table to the data model.

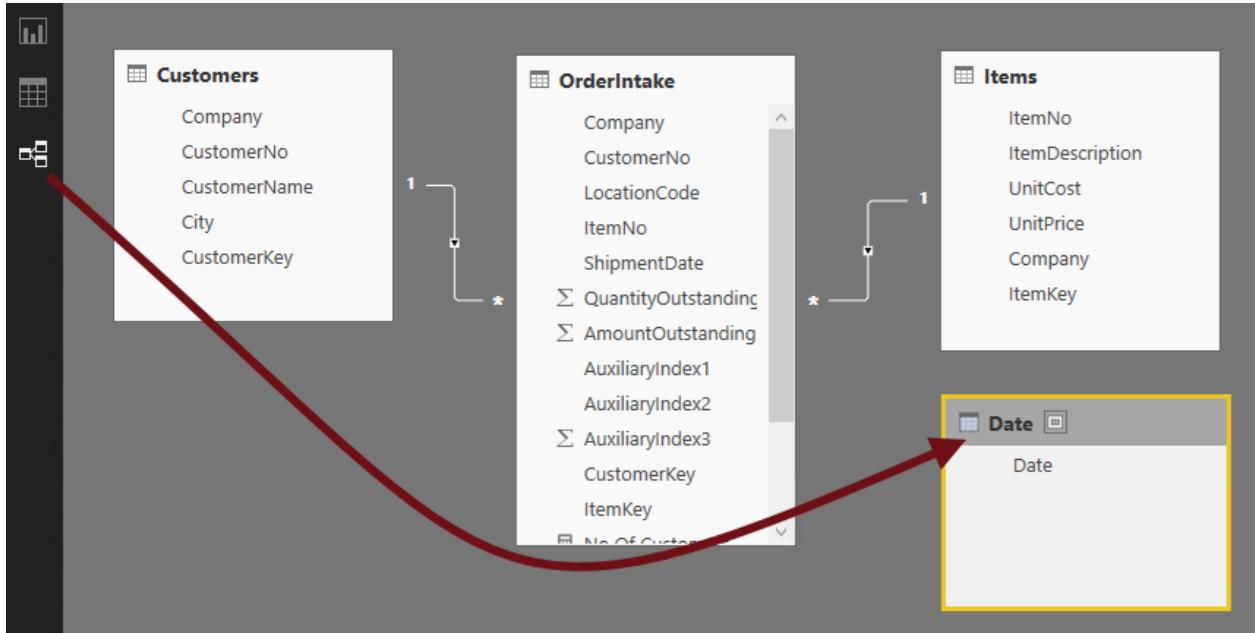
The reason is that we need a table with a continuous date range.

To create the Date table, in the Modeling tab select New Table, and use the following formula:

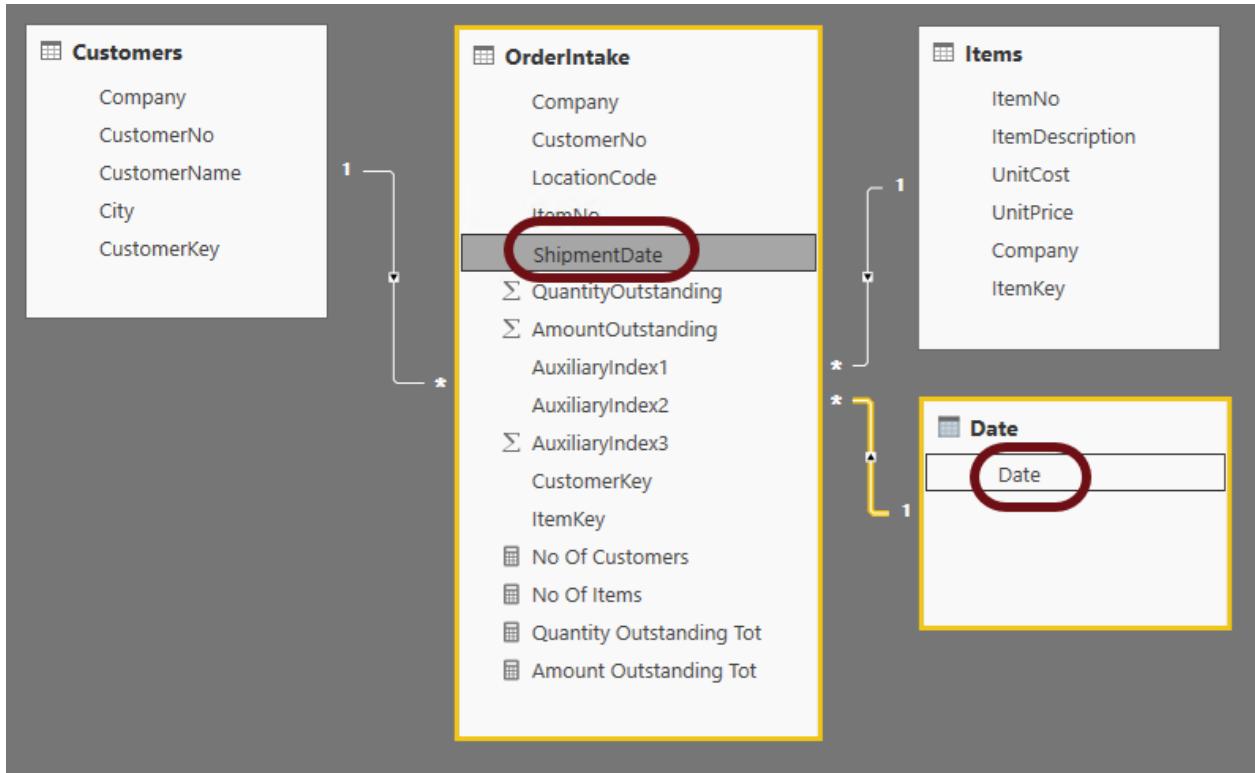
- **Date = CALENDARAUTO()**



You can also see the table in the Relationships window:



Connect the OrderIntake table to the Date table as follows:



In the Data table we will now create new columns:

The screenshot shows the Power BI Desktop interface with the 'Modeling' tab selected in the ribbon. In the 'FIELDS' pane on the right, the 'Date' column is highlighted with a red box. A red arrow points from the 'New Column' button in the ribbon to the 'Date' column in the 'FIELDS' pane.

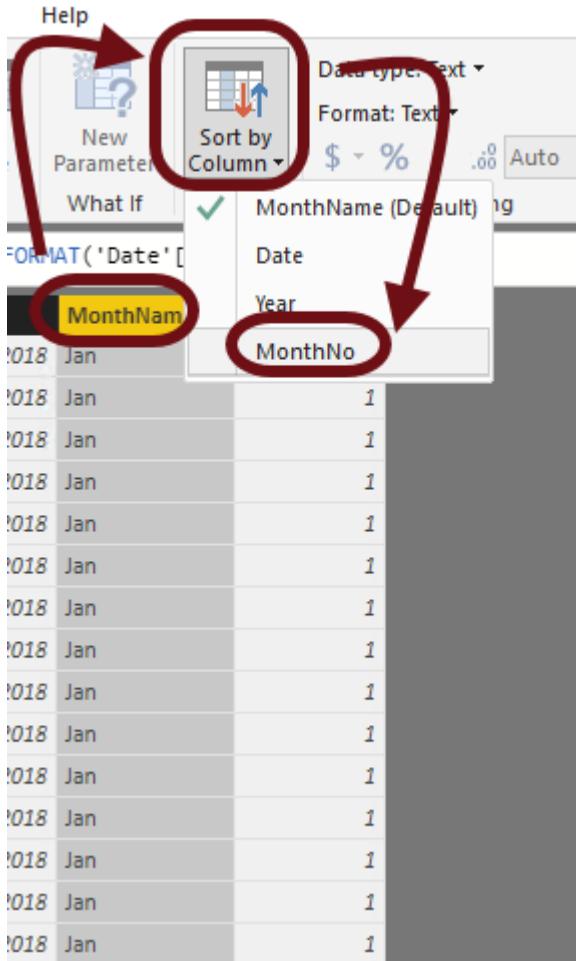
You can use the following DAX formulas to create the columns:

- Year = YEAR('Date'[Date])
- MonthName = FORMAT('Date'[Date], "MMM")
- MonthNo = MONTH('Date'[Date])

The screenshot shows the Power BI Desktop interface with the 'Modeling' tab selected in the ribbon. The data grid displays columns: Date, Year, MonthName, and MonthNo. The 'MonthNo' column is highlighted with a red box. A red arrow points from the 'MonthNo' entry in the 'FIELDS' pane to the 'MonthNo' column in the data grid.

Date	Year	MonthName	MonthNo
1/1/2018 12:00:00 AM	2018	Jan	1
1/2/2018 12:00:00 AM	2018	Jan	1
1/3/2018 12:00:00 AM	2018	Jan	1
1/4/2018 12:00:00 AM	2018	Jan	1
1/5/2018 12:00:00 AM	2018	Jan	1
1/6/2018 12:00:00 AM	2018	Jan	1
1/7/2018 12:00:00 AM	2018	Jan	1
1/8/2018 12:00:00 AM	2018	Jan	1
1/9/2018 12:00:00 AM	2018	Jan	1
1/10/2018 12:00:00 AM	2018	Jan	1
1/11/2018 12:00:00 AM	2018	Jan	1
1/12/2018 12:00:00 AM	2018	Jan	1

And finally, we will set the MonthNo column as the SortBy column for the MonthName:



Year	MonthName (Default)	MonthNo
2018	Jan	1

If you don't set the SortBy Column, then the MonthNames will be sorted alphabetically.

We have now enriched the data model with a Date table and some Measures. Now it's time to create some reports.

Create the Report(s)

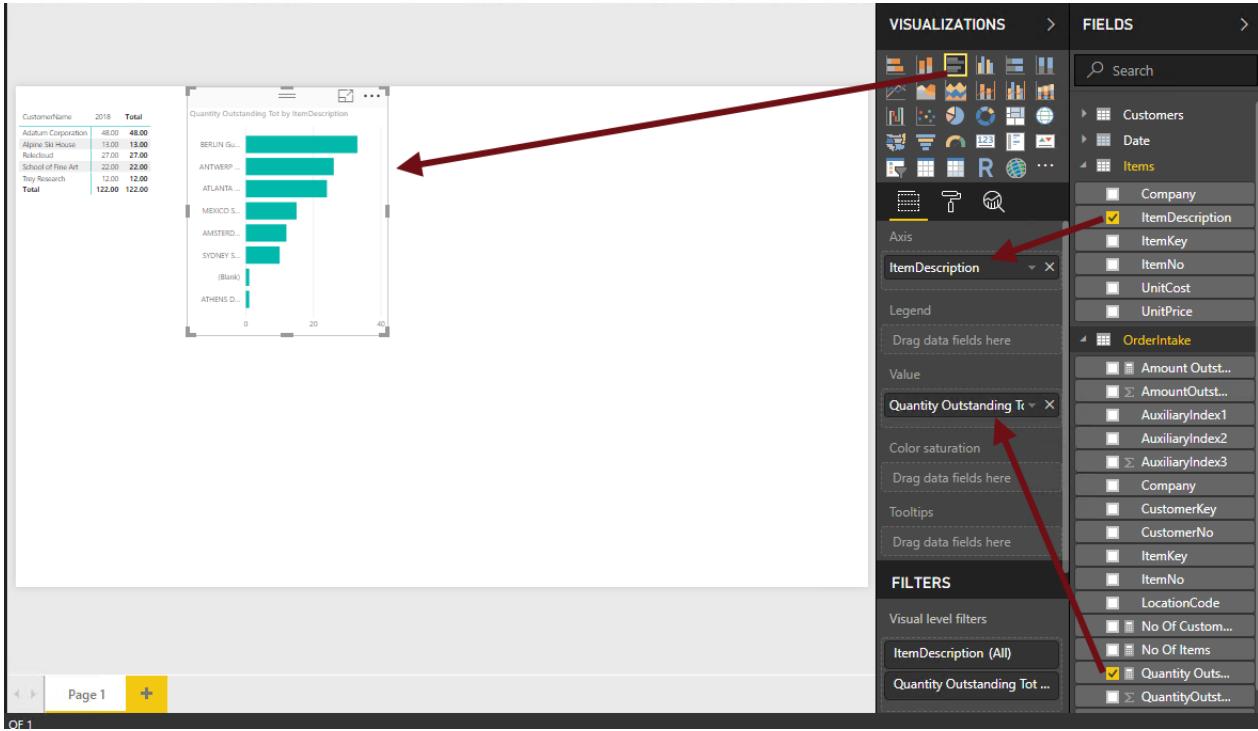
Add a Matrix to the report:

The screenshot shows a reporting interface with a matrix visualization on the left. The matrix has rows labeled 'CustomerName' and columns labeled 'Date'. The 'CustomerName' row contains items like 'Adatum Corporation', 'Allied Home', 'Belford', 'Rutherford', 'School of Fine Art', 'Troy Research', and 'Total'. The 'Date' column has sub-columns for 'Year', 'Quarter', 'Month', and 'Day'. The 'Total' cell in the matrix shows a value of 122.00. To the right of the matrix is a 'VISUALIZATIONS' panel containing various chart icons. A large red arrow points from the matrix area towards this panel.

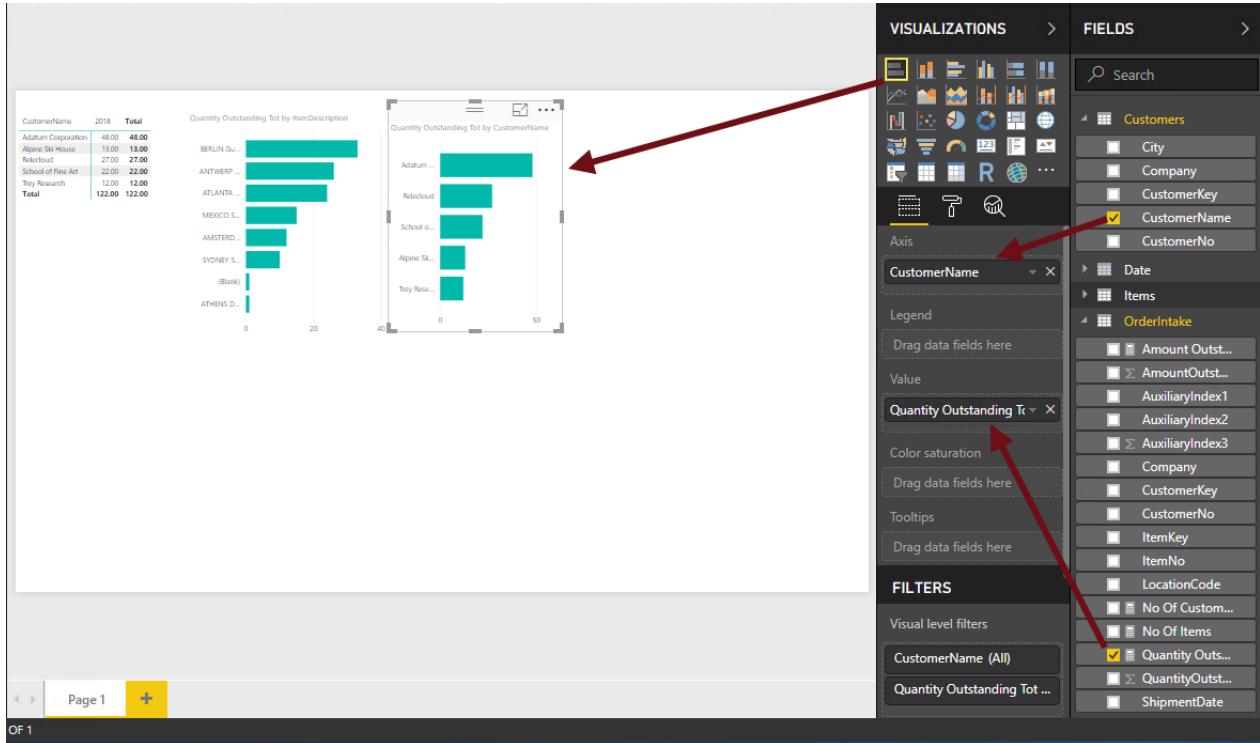
Drag the following fields into Rows, Columns and Values:

The screenshot shows a reporting interface with a matrix visualization on the left and a detailed data pane on the right. The matrix visualization is identical to the one in the previous screenshot. The data pane on the right is titled 'ROWS' and lists 'CustomerName' as the primary row field. Below it are sections for 'COLUMNS' (Date, Year, Quarter, Month, Day) and 'VALUES' (QuantityOutstanding). A large red arrow points from the matrix area towards the 'ROWS' section. Another red arrow points from the matrix area towards the 'VALUES' section. A third red arrow points from the matrix area towards the 'Date' section of the 'COLUMNS' list.

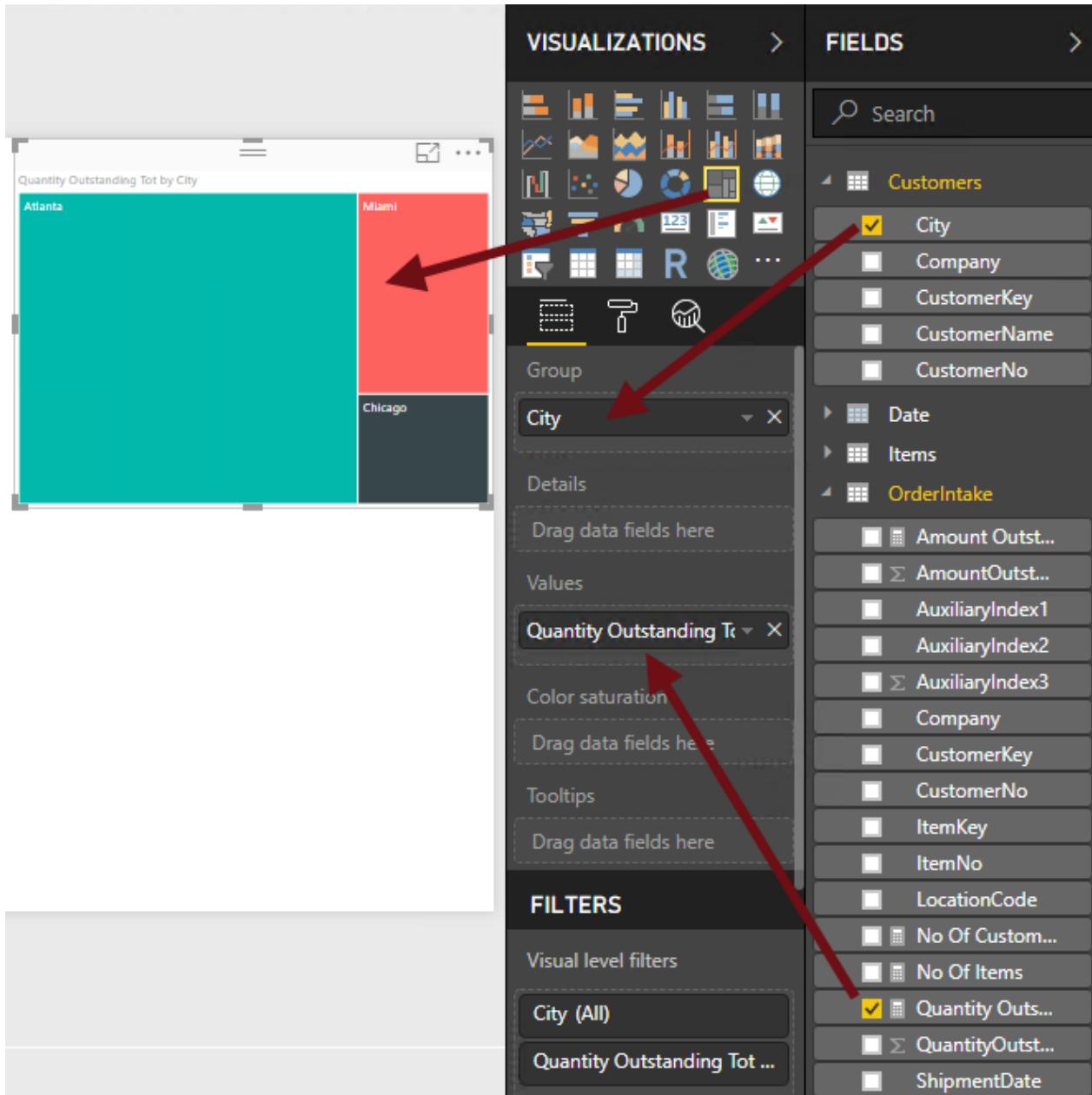
Add a Chart to the report:



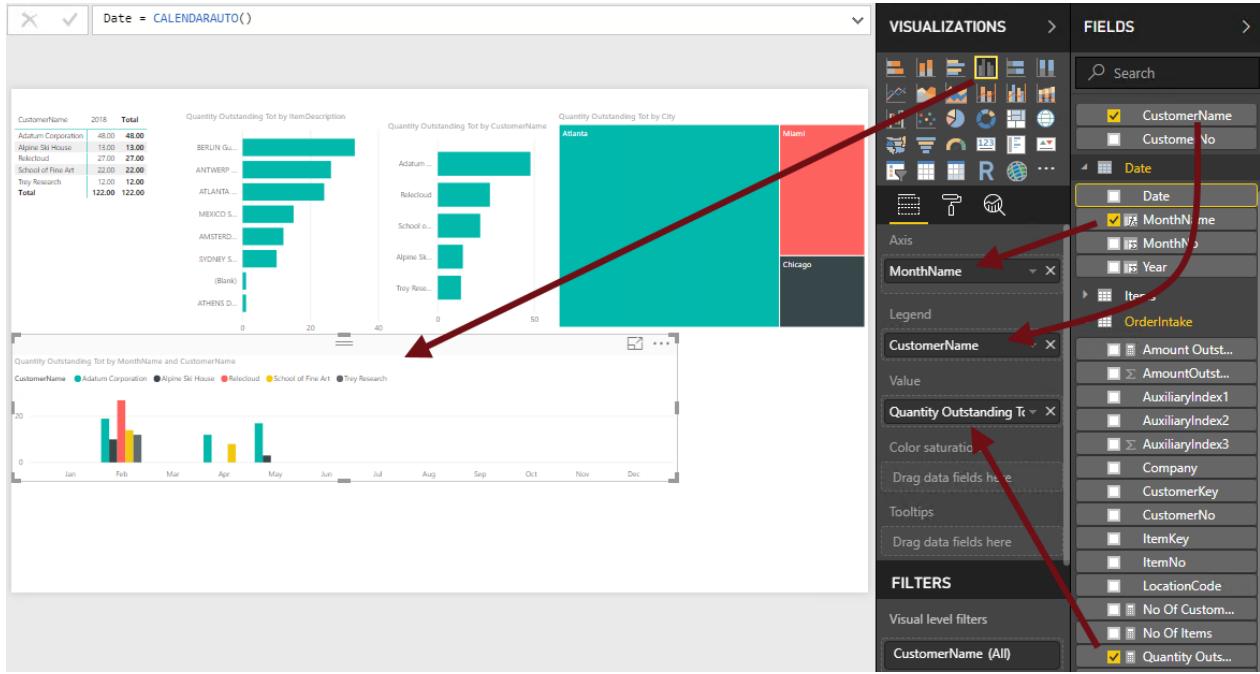
Add another Chart to the report:



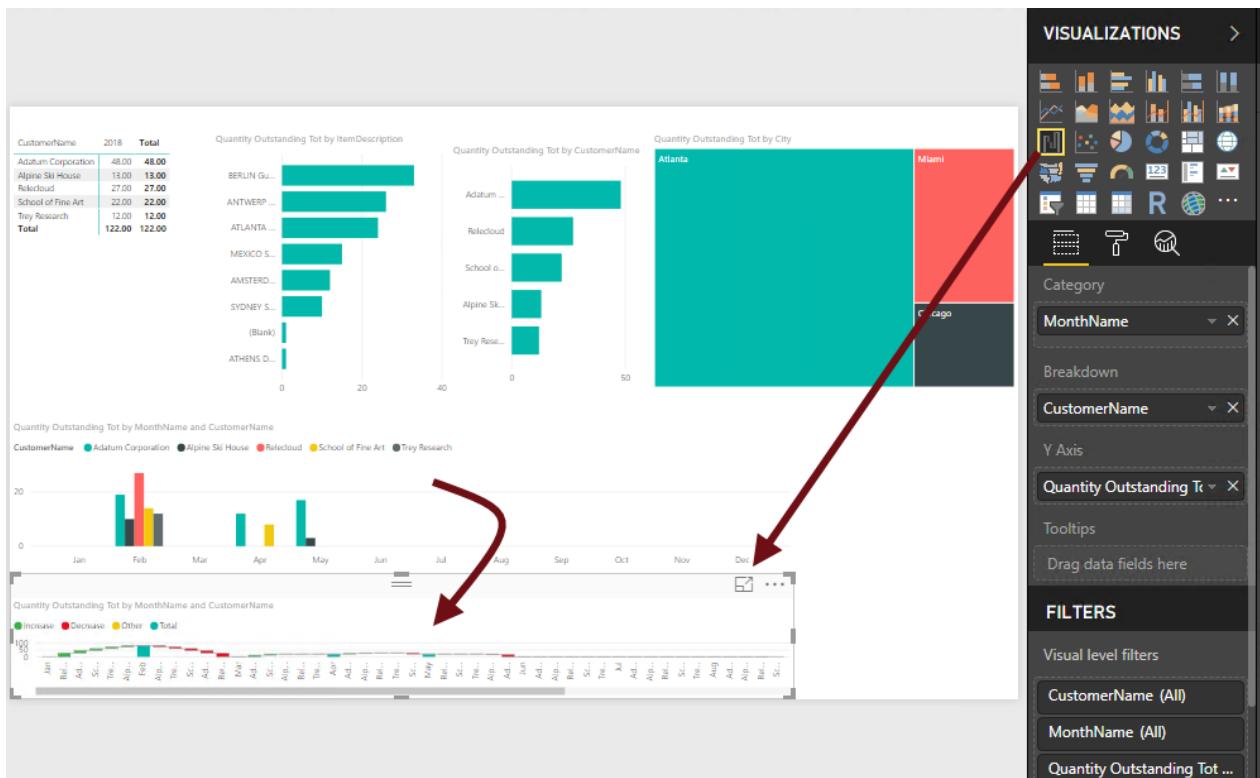
Add a Treemap to the report:



Add another Chart to the report:



Copy/Paste the previous chart and change it into a Waterfall chart:



Add a Slicer:

The screenshot displays the Power BI desktop interface. On the left, there is a visual showing two colored slices: one red labeled 'Miami' and one green labeled 'Chicago'. The ribbon bar at the top has 'MonthName' selected. In the center, the 'FILTERS' pane is open, showing various filter categories: 'Visual level filters', 'Page level filters', 'Drillthrough filters', and 'Report level filters'. Under 'Visual level filters', there is a section titled 'Drag data fields here' which contains the 'MonthName' field. To the right of the filters pane is a large list of data fields, including CustomerName, CustomerNo, Date, MonthName (which is checked), MonthNo, Year, Items, OrderIntake, Amount Outst..., AmountOutst..., AuxiliaryIndex1, AuxiliaryIndex2, AuxiliaryIndex3, Company, CustomerKey, CustomerNo, ItemKey, and ItemNo.

Add another Slicer:

The screenshot shows a Power BI report interface. On the left is a treemap visualization with a teal section labeled 'Year' and a red section labeled 'Chicago'. Below the treemap is a slicer for the 'Year' field, which has '2018' selected. To the right of the treemap is a 'FILTERS' pane. At the top of the filters pane is a 'Field' dropdown set to 'Year', with a red arrow pointing to it from the top-left. The filters pane contains sections for 'Visual level filters', 'Page level filters', 'Drillthrough filters', and 'Report level filters', each with a placeholder 'Drag data fields here'. To the right of the filters pane is a list of data fields categorized by type:

- Date**: Date, MonthName, MonthNo, Year (checked)
- Items**: Items
- OrderIntake**: OrderIntake
- Amount**: Amount Outst..., Σ AmountOutst..., AuxiliaryIndex1, AuxiliaryIndex2, Σ AuxiliaryIndex3
- Customer**: Company, CustomerKey, CustomerNo
- Item**: ItemKey

Add another Slicer:

The screenshot shows a Power BI report interface. On the left, there is a treemap visualization with a teal section labeled 'Year' containing '2018', a red section labeled 'MonthName' containing a list of months from Jan to Dec, and a dark grey section labeled 'Chicago'. Below the treemap are two dropdown menus: 'Year' (with '2018' selected) and 'Company' (with 'CRONUS USA, Inc.' selected). A red arrow points from the 'Company' dropdown down to the 'Company' filter field in the filter pane.

The filter pane on the right is titled 'FILTERS' and contains the following sections:

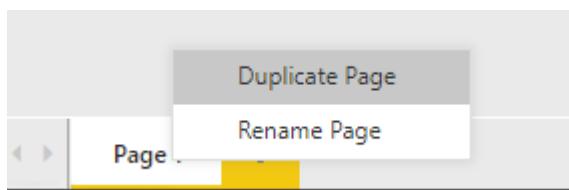
- Visual level filters:** Drag data fields here
- Page level filters:** Drag data fields here
- Drillthrough filters:** Drag drillthrough fields here
- Report level filters:** Drag data fields here

A red arrow points from the 'Company' filter field in the pane back up to the 'Company' dropdown menu at the bottom left.

The filter pane also lists several data fields under categories like Date, Items, and OrderIntake:

- Date: Date, MonthName, MonthNo, Year
- Items
- OrderIntake: Amount Outst..., AmountOutst..., AuxiliaryIndex1, AuxiliaryIndex2, AuxiliaryIndex3, Company, CustomerKey, CustomerNo, ItemKey, ItemNo, LocationCode, N_GSC...

Duplicate the Report page:

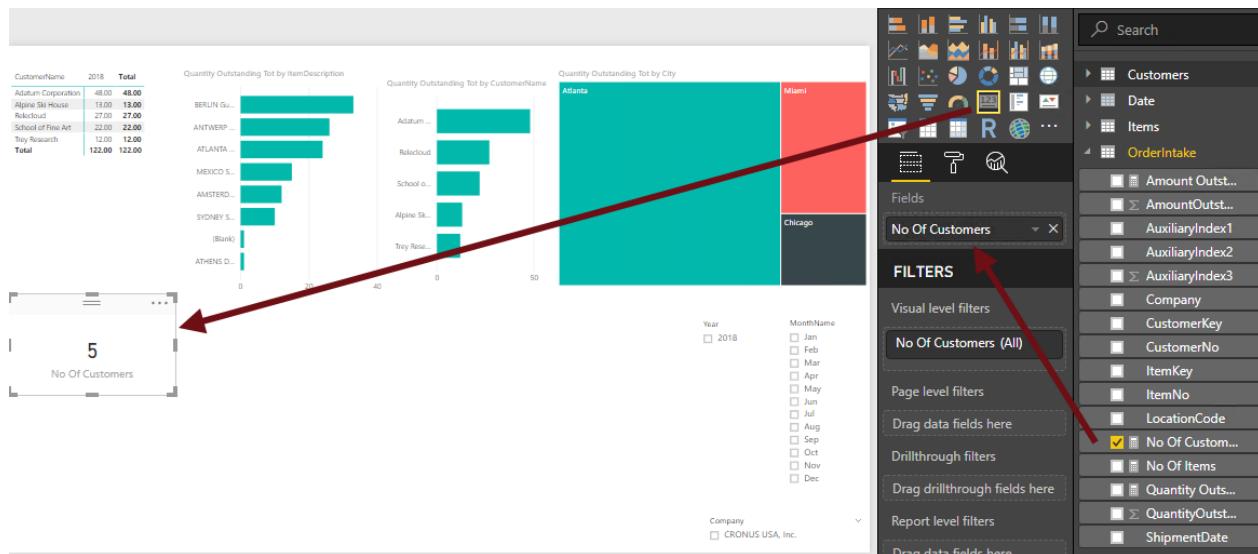


On the new page, remove the bottom charts:



Then go into the visuals on the new page and replace the Quantity fields by the corresponding Amount fields.

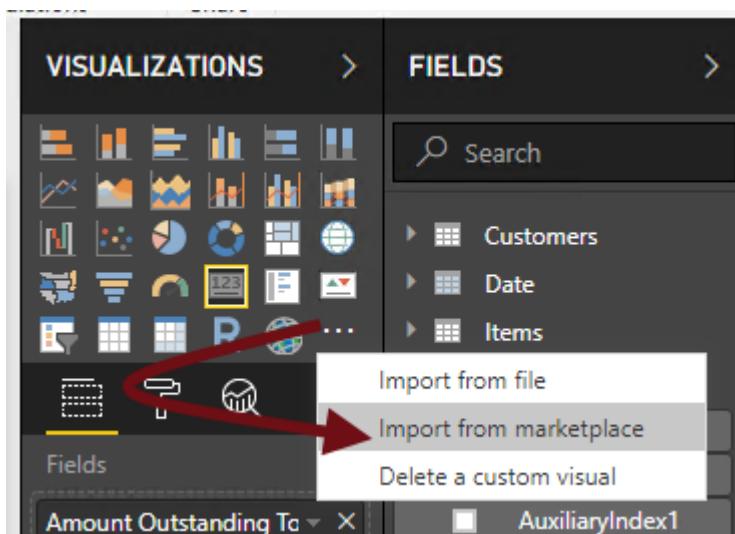
Add a Card:



Copy/Paste the Card and add the following cards:



Add a custom visual:



Look for the Calendar visual and Add it:

X

Power BI Visuals

Add-ins may access personal and document information. By using an add-in, you agree to its Permissions, License Terms and Privacy Policy.

calendar

Category

All

Editor's Picks

Filters

KPIs

Maps

Advanced Analytics

Time

Gauges

Infographics

Data Visualizations

Suggested for you ▾

Calendar Visual
This visual allows for the displaying of data distributed over time in a compelling and clear style!

Beyondsoft Calendar
Visualize your monthly data and assign custom colors with this dynamic, data-driven calendar visual.

Calendar by Tallan
A standard calendar layout that filters and aggregates data across a range of dates.

Custom Calendar by Akvelon
Customize how you visualize day-to-day data with this easy to use Custom Calendar

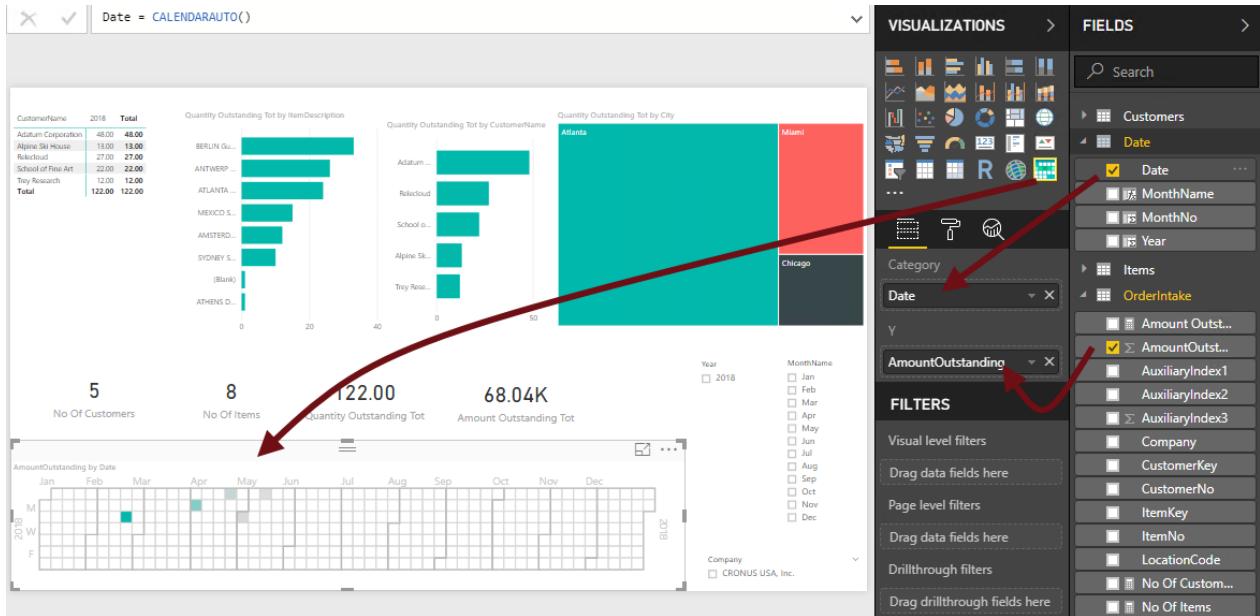
Add

Add

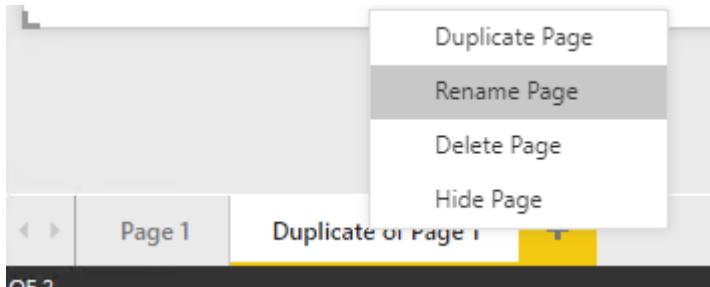
Add

Add

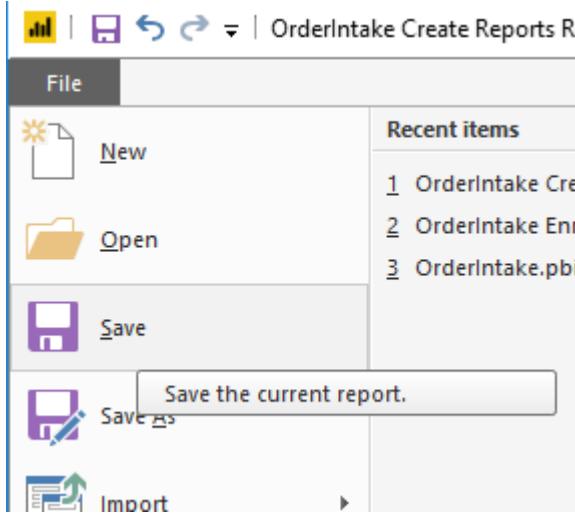
Add it to the report as follows:



Rename the pages:



The report is now ready to publish. Please Save it now:



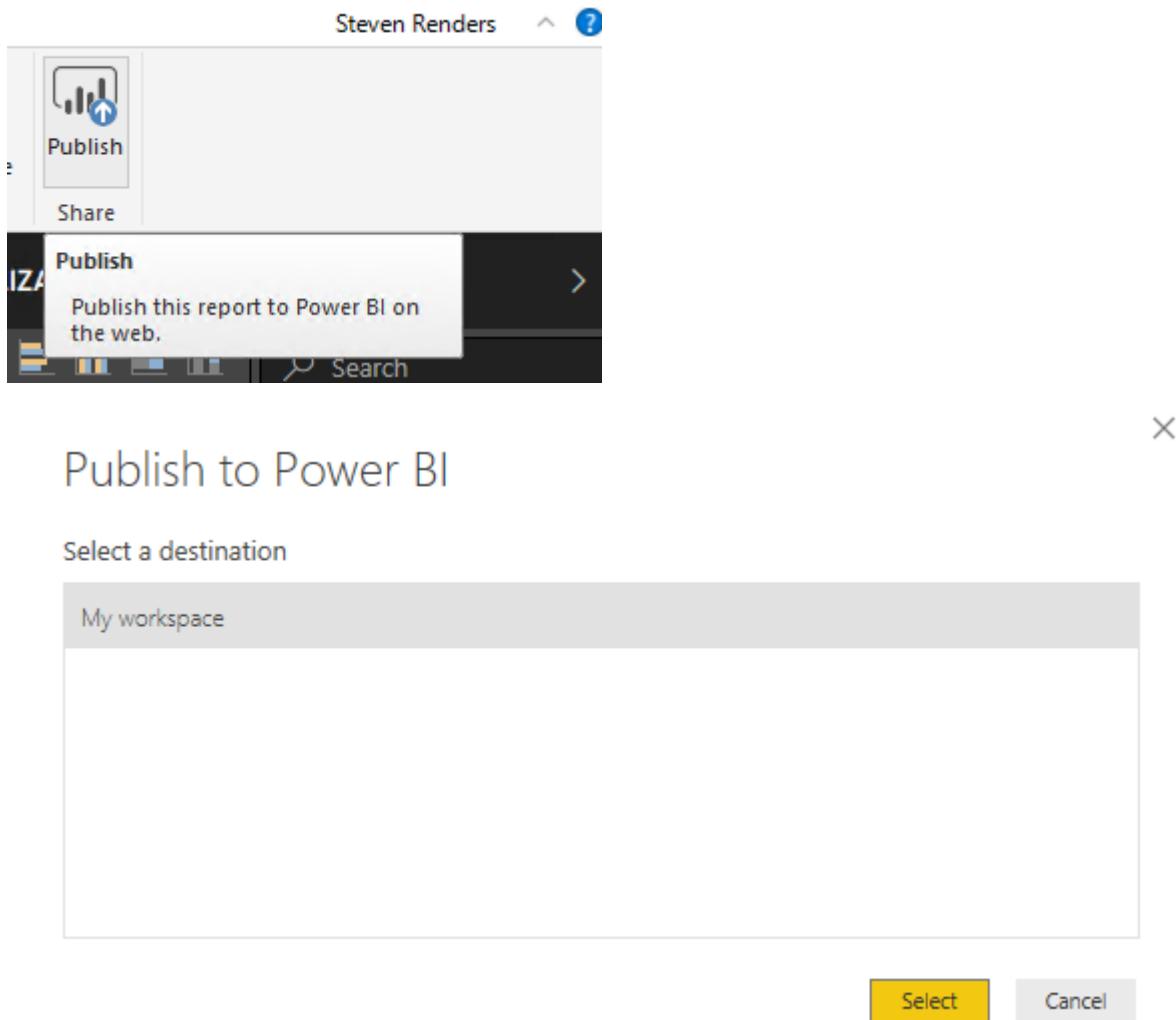
[Publish your pbix file to the Power BI Service](#)

In order to publish our report, you need to sign in:

A screenshot of the Power BI service sign-in page. The page has a header with 'Sign in' and a 'Sign in' button. The main content area says 'Power BI Desktop and the Power BI service work seamlessly when you're signed in.' It has an 'Email' input field and a 'Sign in' button. At the bottom, it says 'Need a Power BI account? Try for free.' To the right of the sign-in form is a ribbon menu with various icons for 'New Page', 'New Visual', 'Insert', 'From Marketplace', 'From File', 'Manage Relationships', 'New Measure', 'New Column', 'New Quick Measure', 'Calculations', and 'Share'. Below the ribbon are sections for 'VISUALIZATIONS' (with a grid of chart icons) and 'FIELDS' (listing 'Customers', 'Date', 'Items', 'OrderIntake', and other fields like 'MonthName', 'MonthNo', 'Year', 'Amount Outst...', 'AmountOutst...', and 'Auxiliary/Index1'). A red arrow points from the top right towards the 'Email' input field on the sign-in page.

Use your email address that you used to create your Power BI account.

Then Publish the report:



Publishing to Power BI

∴ Publishing 'OrderIntake Create Reports Result.pbix' to Power BI



Did you know?

You can create a portrait view of your report tailored for mobile phones,
on the **View** tab select **Phone Layout**. [Learn more](#)

Cancel

Publishing to Power BI

✓ Success!

[Open 'OrderIntake Create Reports Result.pbix' in Power BI](#)

[Get Quick Insights](#)



Did you know?

You can create a portrait view of your report tailored for mobile phones,
on the **View** tab select **Phone Layout**. [Learn more](#)

Got it

Go to powerbi.microsoft.com or select the link in the popup:

Power BI My Workspace > OrderIntake Create Reports Result

Favorites

CustomerName	2018	Total
Adatum Corporation	19,180.28	39,380.28
Alpine Ski House	1,980.00	3,960.00
BET	7,447.13	15,894.26
School of Fine Art	15,249.21	15,449.21
Troy Research	4,045.24	4,045.24
Total	68,042.84	68,042.84

Recent

Apps

Shared with me

Workspaces

My Workspace

Get Data

Order Intake by Quantity

Order Intake by Amount

Amount Outstanding Tot by Item Description

Amount Outstanding Tot by Customer Name

Amount Outstanding Tot by City

No Of Customers: 5

No Of Items: 8

Quantity Outstanding Tot: 122.00

Amount Outstanding Tot: 68.04K

Year: 2018

MonthName

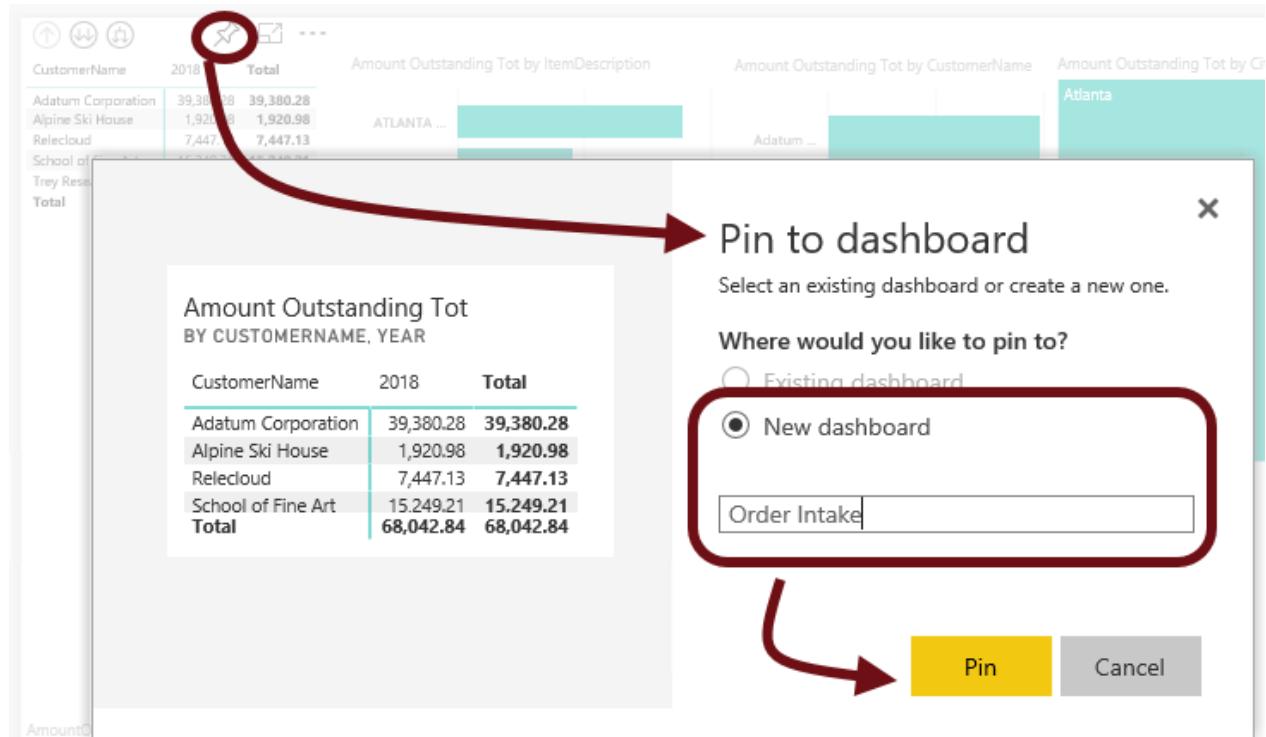
- Jan
- Feb
- Mar
- Apr
- May
- Jun
- Jul
- Aug
- Sep
- Oct
- Nov
- Dec

AmountOutstanding by Date

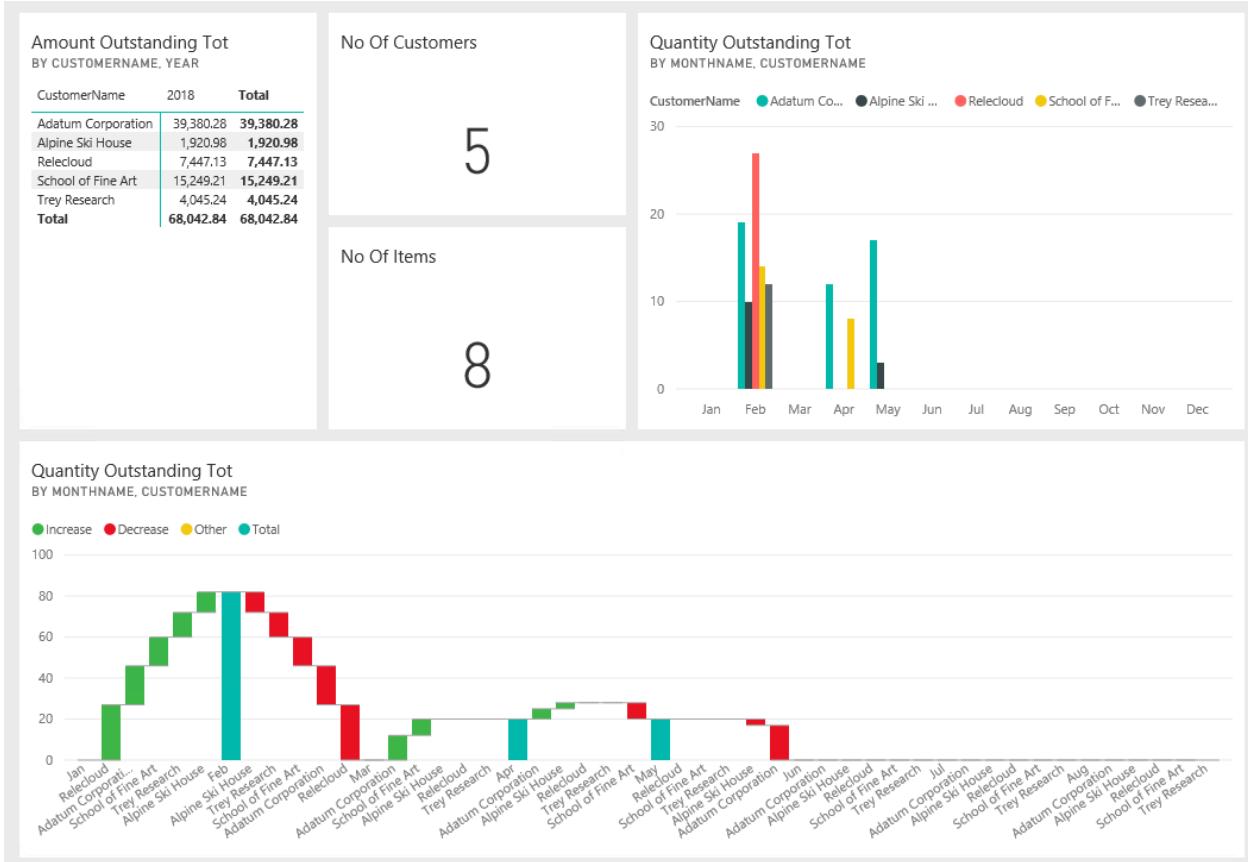
Company: CRONUS USA, Inc.

Create a Dashboard

To create a Dashboard, select the Pin icon on one of the visuals and pin it:



Once you have pinned your visuals to the dashboard, you can go to the dashboard and resize the visuals:



Our Power BI Order Intake dashboard is ready now, congratulations!