[Company name]

Visualizing

[Document subtitle]

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[Date]

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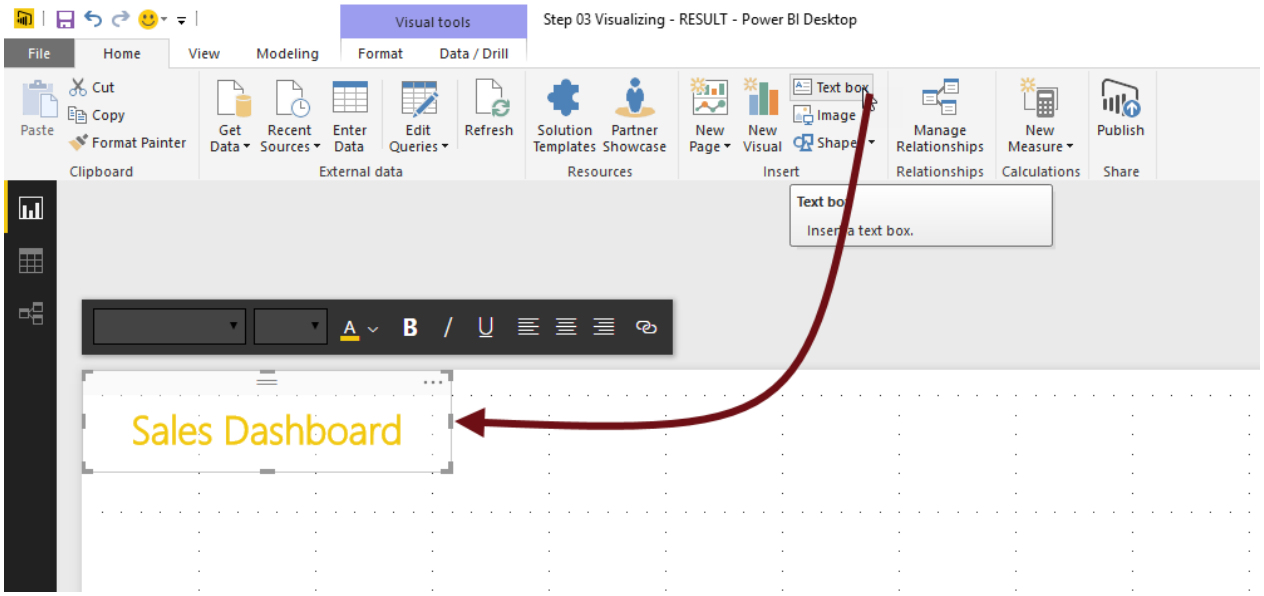
Step 03 Visualizing

You can continue to work on your previous Power BI Desktop file, or you can start with this file: Step 02 Step 03 Visualizing - START.pbix

Now that we have a Power BI Desktop file with a good data model, you are ready to create some reports and bring the information to life.

Add a Title

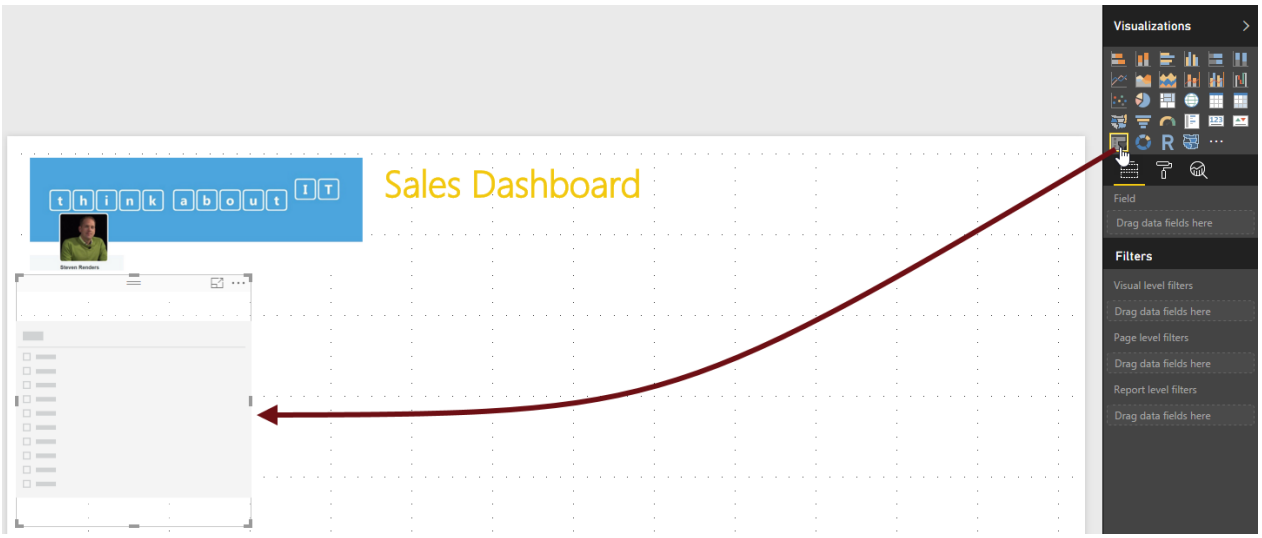
Start by adding a title for the dashboard.



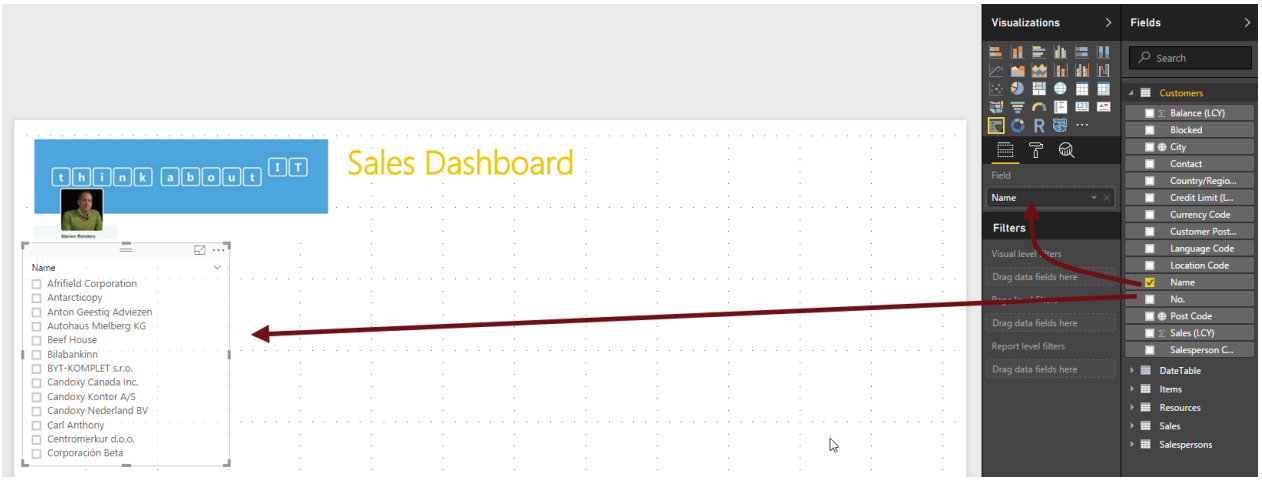
From the ribbon, select a textbox and use the formatting buttons to format the text. You can also include a logo if you want:

Add Slicers

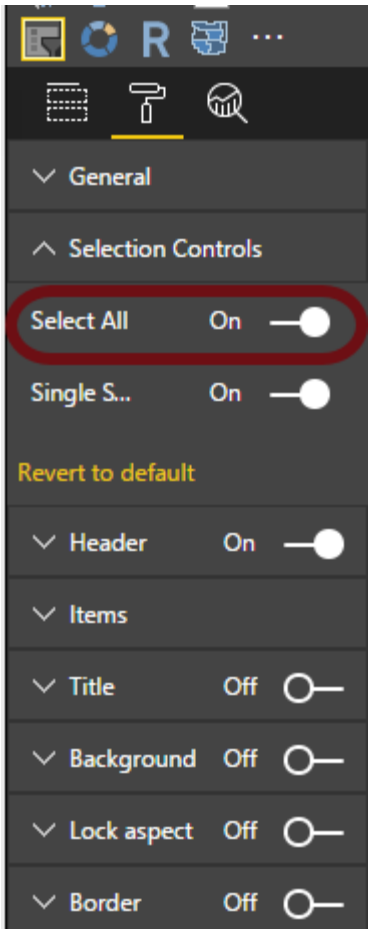
To filter the result, you can add some Slicers to the report. In the Visualizations, select Slicer, and drag in onto the report:



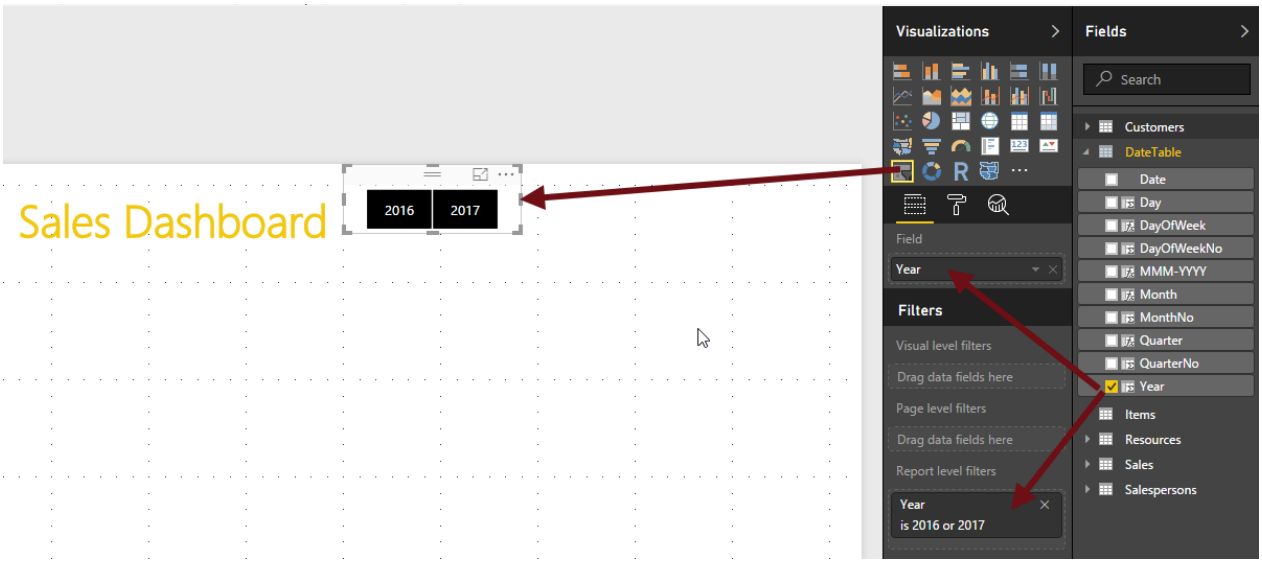
Then add the Customer Name to the Slicer:



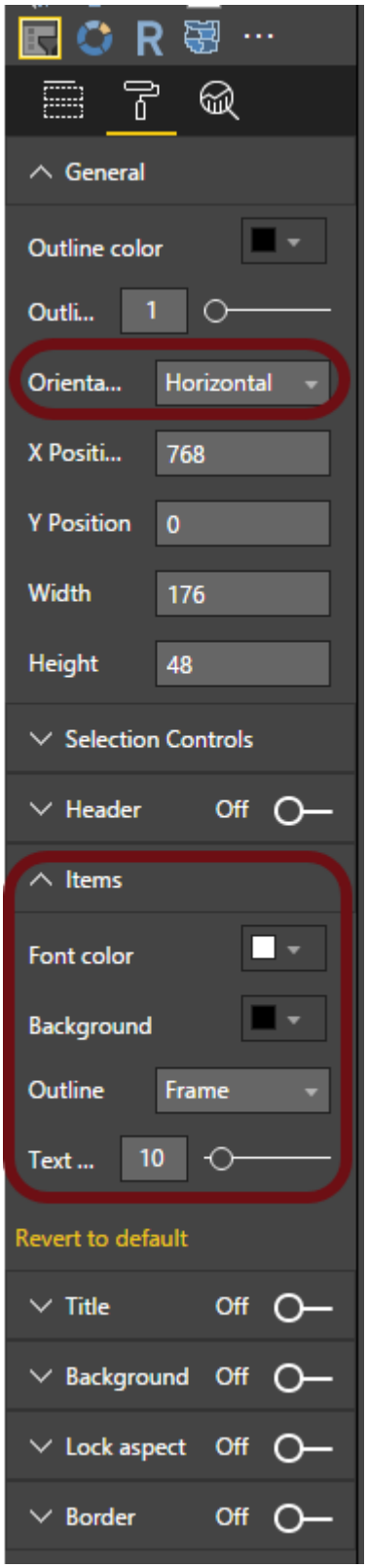
Next, enable Select All, using the Paint Brush:



Now we'll add another Slicer, for the Year:

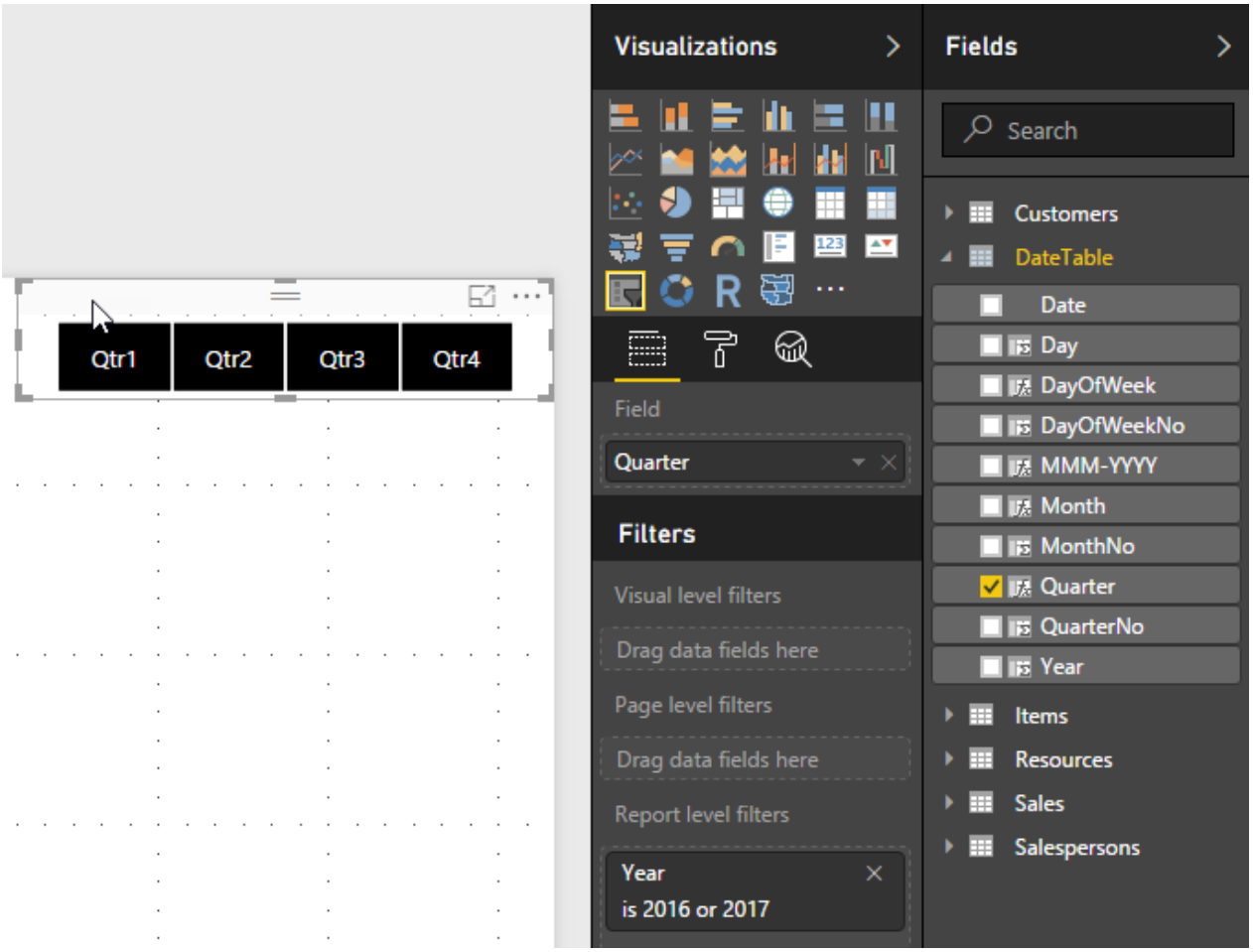


In the report level filters, filter on 2016 and 2017. Then, using the brush options:



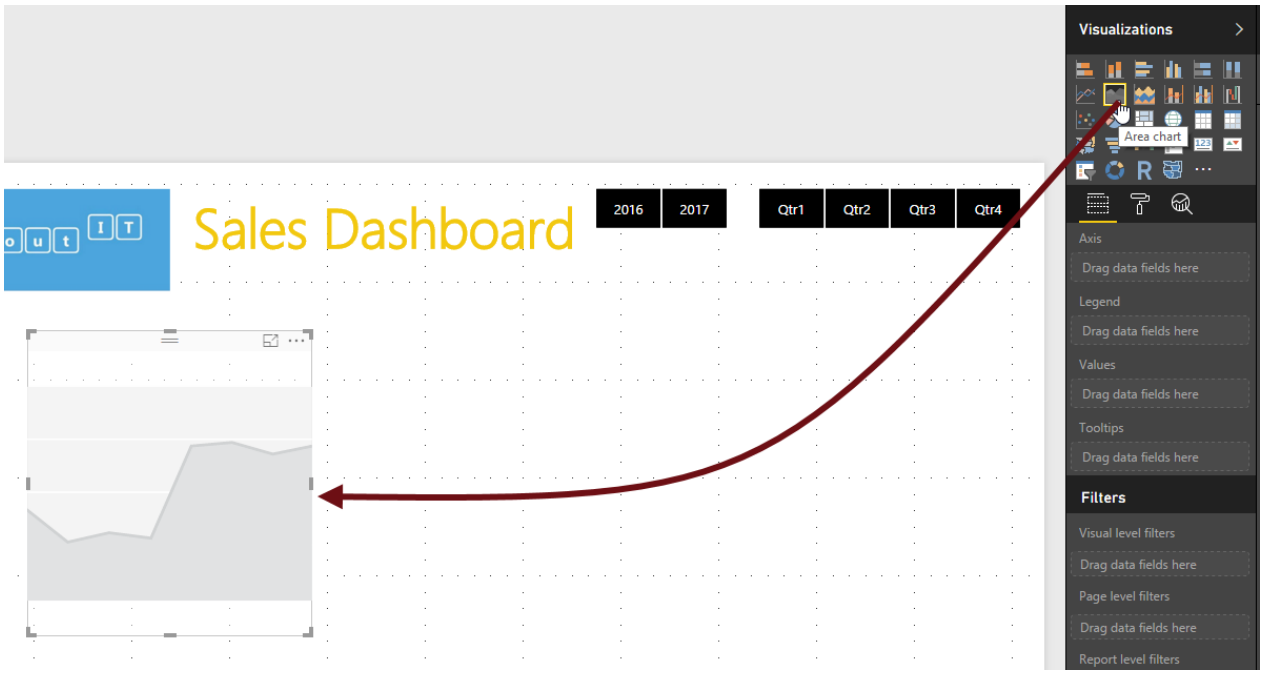
Change the orientation to horizontal, and set the colors for the Items, until the years resemble black squares, as in the above image.

Now repeat the same steps to add a Quarter slicer:

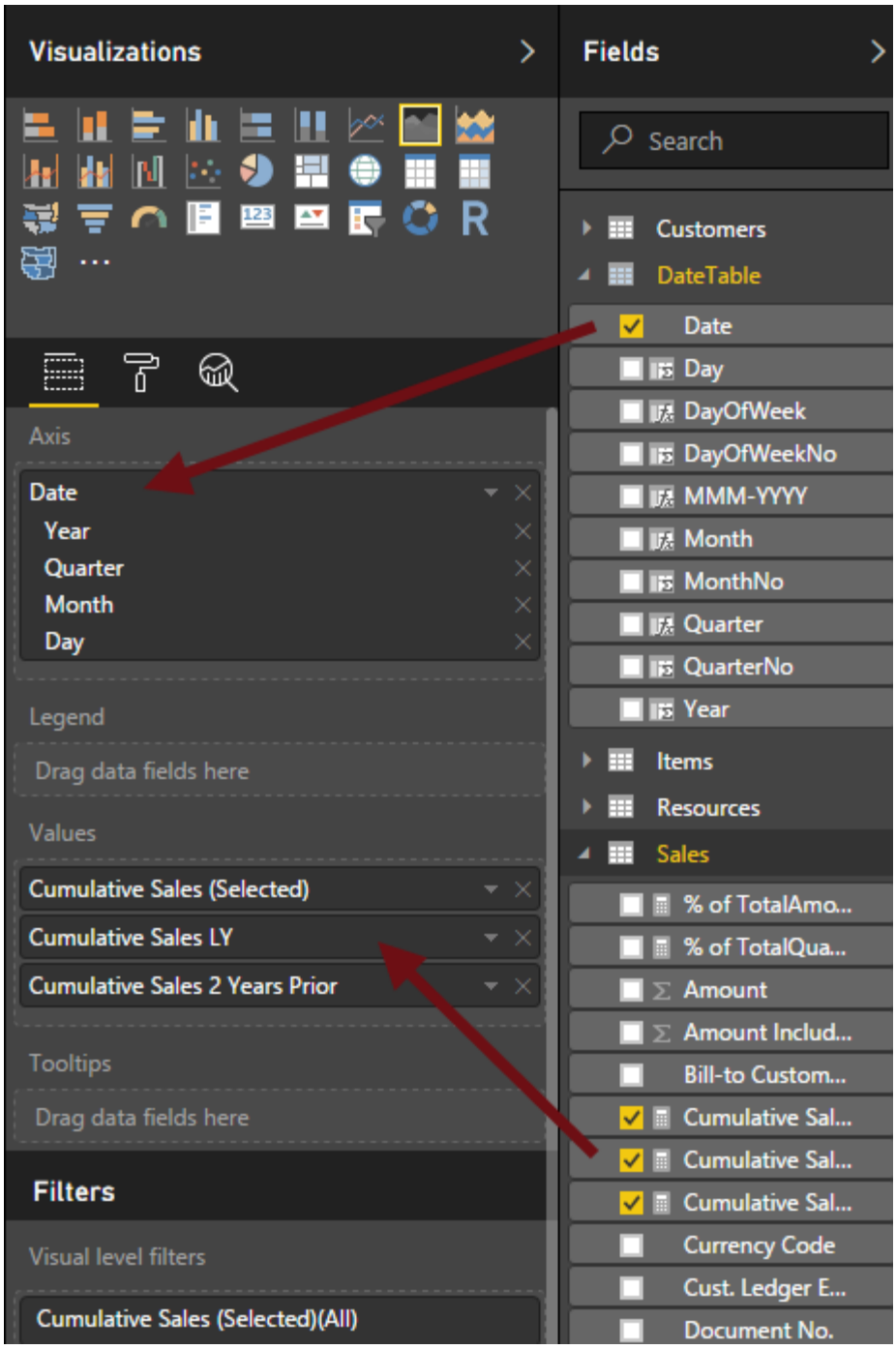


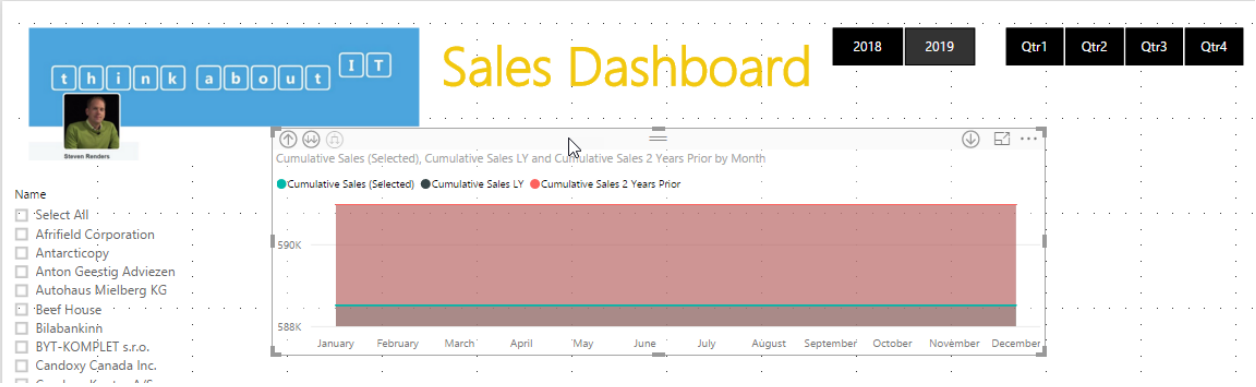
Add a Chart

Next add an Area Chart to the report:



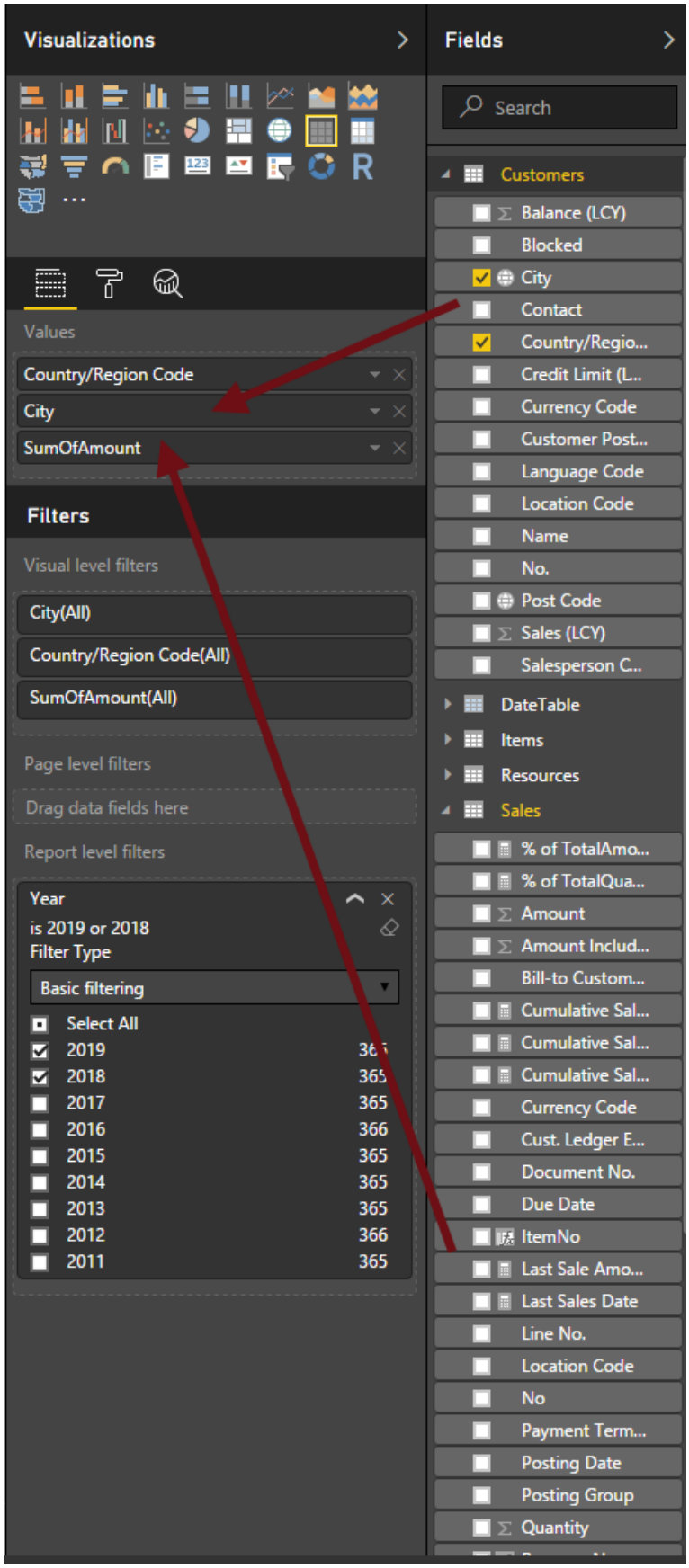
In the area chart set the following properties:

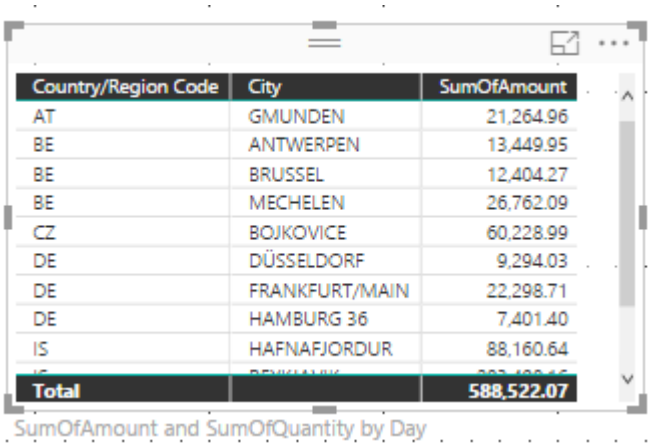

Visualizations
Fields
Search
Customers
DateTable
Date
Day
DayOfWeek
DayOfWeekNo
MMM-YYYY
Month
MonthNo
Quarter
QuarterNo
Year
Items
Resources
Sales
% of TotalAmo...
% of TotalQua...
Amount
Amount Includ...
Bill-to Custom...
Cumulative Sal...
Cumulative Sal...
Cumulative Sal...
Currency Code
Cust. Ledger E...
Document No.
Axis
Date
Year
Quarter
Month
Day
Legend
Drag data fields here
Values
Cumulative Sales (Selected)
Cumulative Sales LY
Cumulative Sales 2 Years Prior
Tooltips
Drag data fields here
Filters
Visual level filters
Cumulative Sales (Selected)(All)



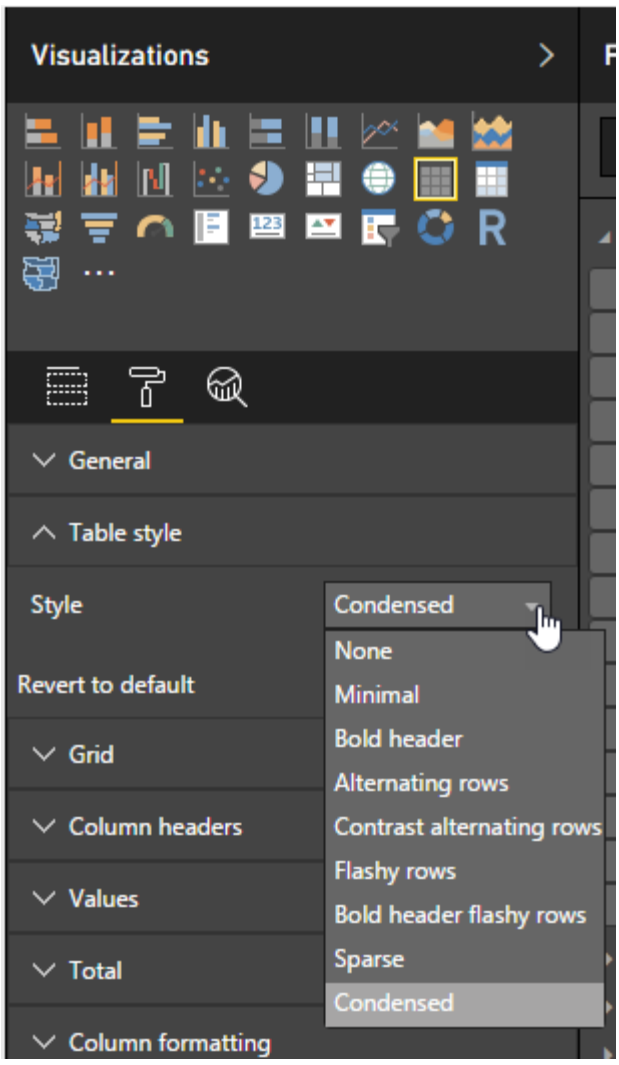
Add a Table

Next add a Table to the report, below the chart:


Visualizations
Fields
Search
Values
Country/Region Code
City
SumOfAmount
Filters
Visual level filters
City(All)
Country/Region Code(All)
SumOfAmount(All)
Page level filters
Drag data fields here
Report level filters
Year
is 2019 or 2018
Filter Type
Basic filtering
Select All
2019
2018
2017
2016
2015
2014
2013
2012
2011
Customers
Balance (LCY)
Blocked
City
Contact
Country/Regio...
Credit Limit (L...
Currency Code
Customer Post...
Language Code
Location Code
Name
No.
Post Code
Sales (LCY)
Salesperson C...
DateTable
Items
Resources
Sales
% of TotalAmo...
% of TotalQua...
Amount
Amount Includ...
Bill-to Custom...
Cumulative Sal...
Cumulative Sal...
Cumulative Sal...
Currency Code
Cust. Ledger E...
Document No.
Due Date
ItemNo
Last Sale Amo...
Last Sales Date
Line No.
Location Code
No
Payment Term...
Posting Date
Posting Group
Quantity

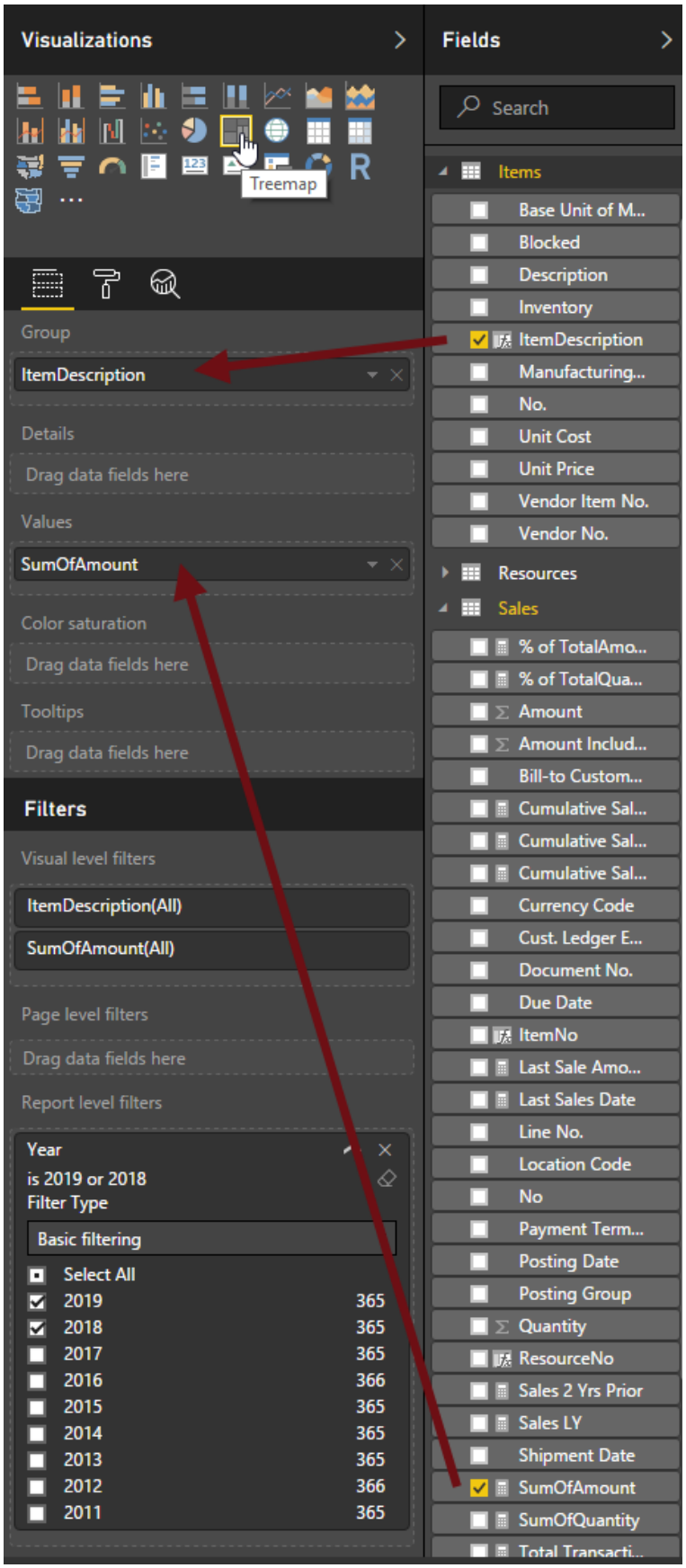


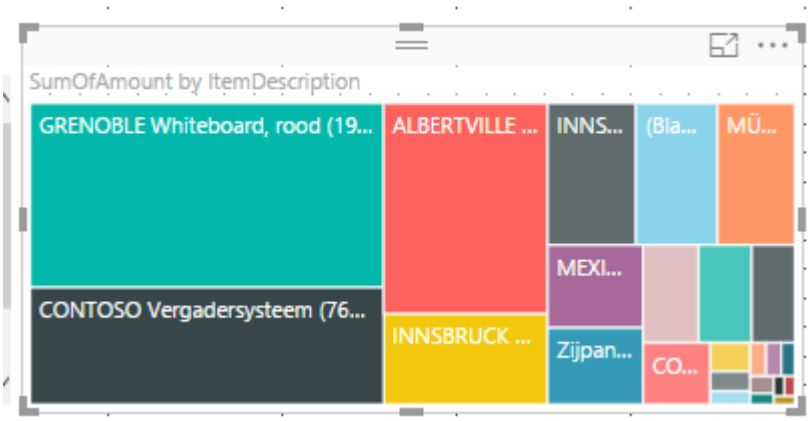
Then set the table style to condensed:



Add a TreeMap

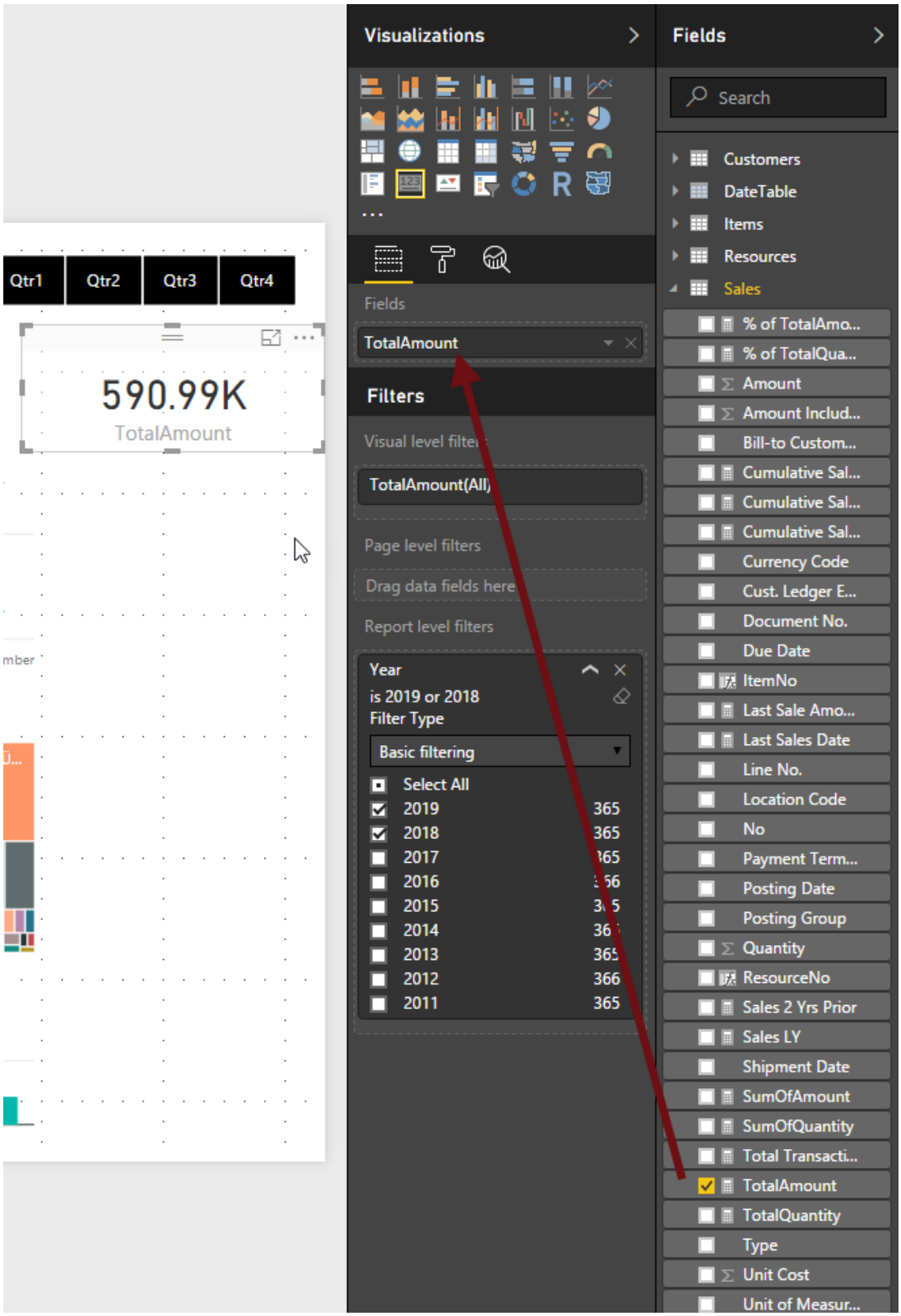
Now add a TreeMap to the report:


Visualizations
Fields
Search
Treemap
Items
Base Unit of M...
Blocked
Description
Inventory
ItemDescription
Manufacturing...
No.
Unit Cost
Unit Price
Vendor Item No.
Vendor No.
Resources
Sales
% of TotalAmo...
% of TotalQua...
Amount
Amount Includ...
Bill-to Custom...
Cumulative Sal...
Cumulative Sal...
Cumulative Sal...
Currency Code
Cust. Ledger E...
Document No.
Due Date
ItemNo
Last Sale Amo...
Last Sales Date
Line No.
Location Code
No
Payment Term...
Posting Date
Posting Group
Quantity
ResourceNo
Sales 2 Yrs Prior
Sales LY
Shipment Date
SumOfAmount
SumOfQuantity
Group
ItemDescription
Details
Drag data fields here
Values
SumOfAmount
Color saturation
Drag data fields here
Tooltips
Drag data fields here
Filters
Visual level filters
ItemDescription(All)
SumOfAmount(All)
Page level filters
Drag data fields here
Report level filters
Year
is 2019 or 2018
Filter Type
Basic filtering
Select All
2019 365
2018 365
2017 365
2016 366
2015 365
2014 365
2013 365
2012 366
2011 365

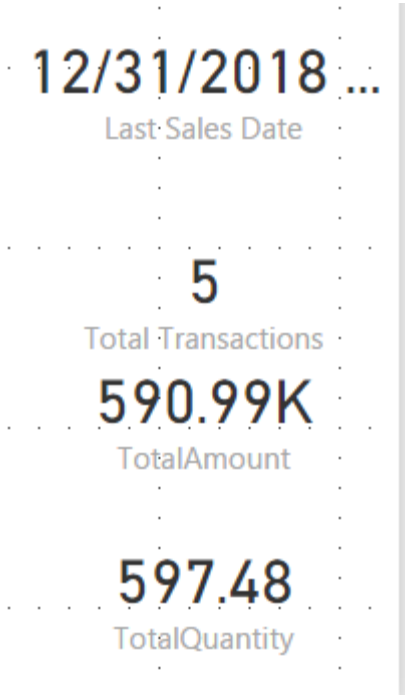


Add Cards:

Now add a Card to the report:

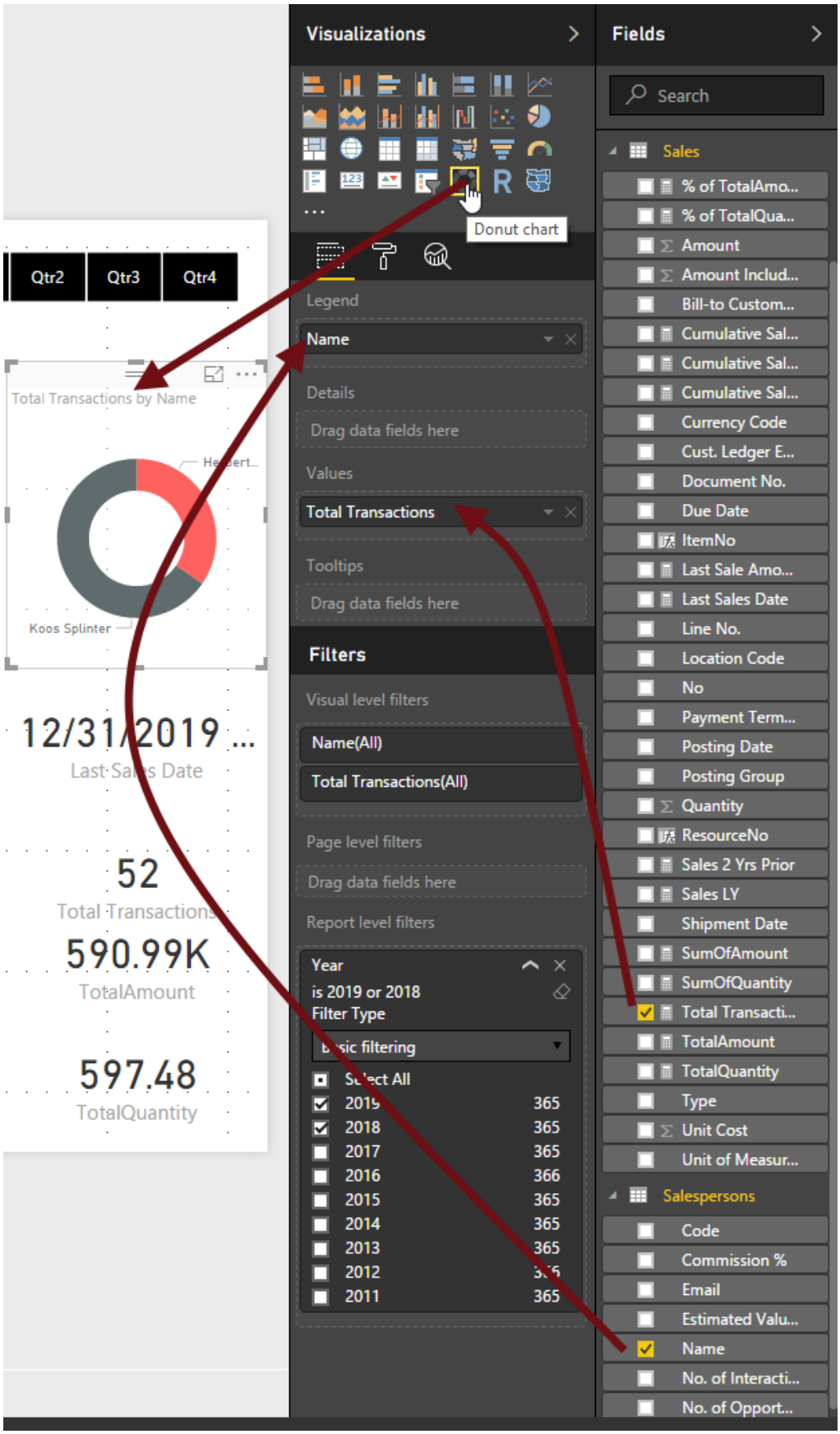


Repeat this for other KPI's:



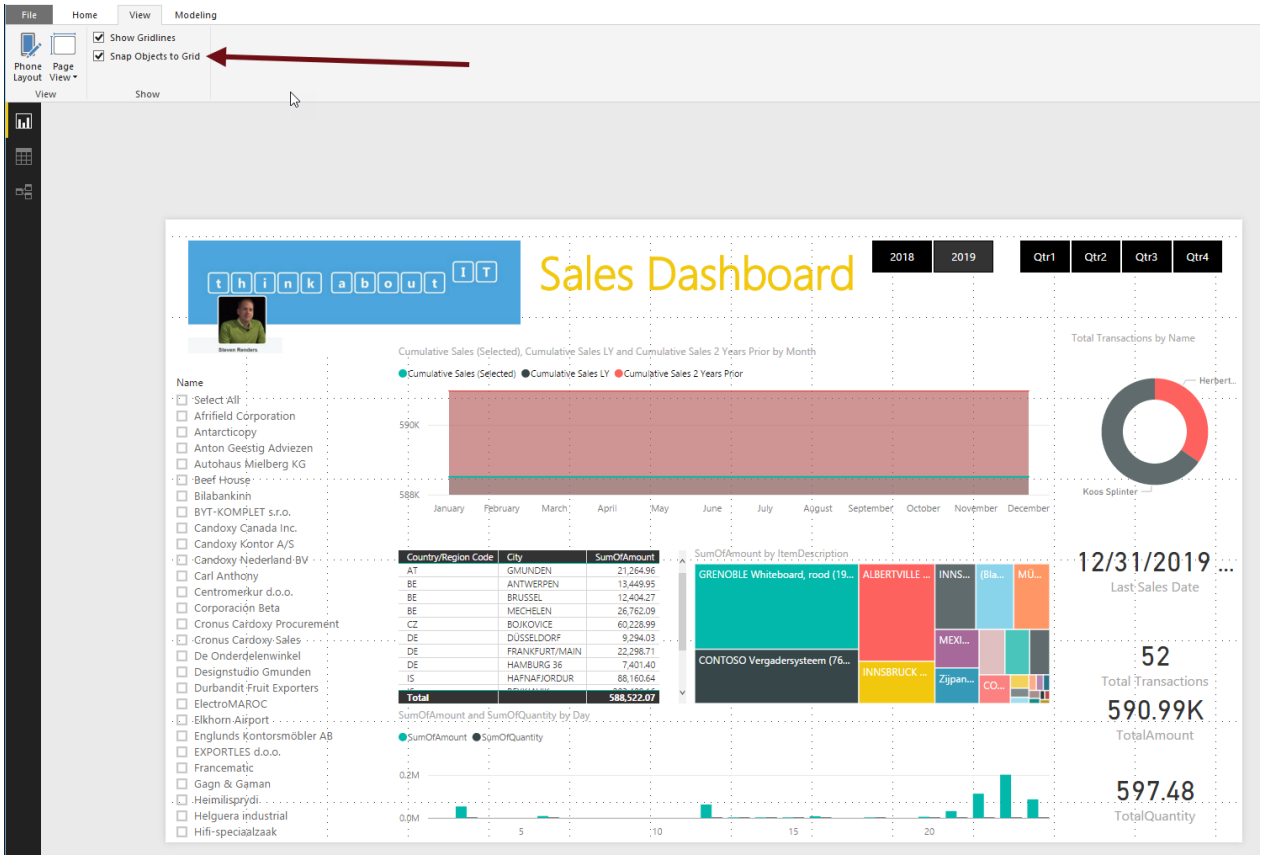
Add a Donut Chart

Now add a Donut Chart to the report, for the total transactions per Salesperson:


Visualizations
Fields
Search
Donut chart
Legend
Name
Details
Drag data fields here
Values
Total Transactions
Tooltips
Drag data fields here
Filters
Visual level filters
Name(All)
Total Transactions(All)
Page level filters
Drag data fields here
Report level filters
Year
is 2019 or 2018
Filter Type
Basic filtering
Select All
2019 365
2018 365
2017 365
2016 366
2015 365
2014 365
2013 365
2012
2011 365
Sales
% of TotalAmo...
% of TotalQua...
Amount
Amount Includ...
Bill-to Custom...
Cumulative Sal...
Cumulative Sal...
Cumulative Sal...
Currency Code
Cust. Ledger E...
Document No.
Due Date
ItemNo
Last Sale Amo...
Last Sales Date
Line No.
Location Code
No
Payment Term...
Posting Date
Posting Group
Quantity
ResourceNo
Sales 2 Yrs Prior
Sales LY
Shipment Date
SumOfAmount
SumOfQuantity
Total Transacti...
TotalAmount
TotalQuantity
Type
Unit Cost
Unit of Measur...
Salespersons
Code
Commission %
Email
Estimated Valu...
Name
No. of Interacti...
No. of Opport...
Qtr2
Qtr3
Qtr4
Total Transactions by Name
Koos Splinter
12/31/2019
Last Sales Date
52
Total Transactions
590.99K
TotalAmount
597.48
TotalQuantity

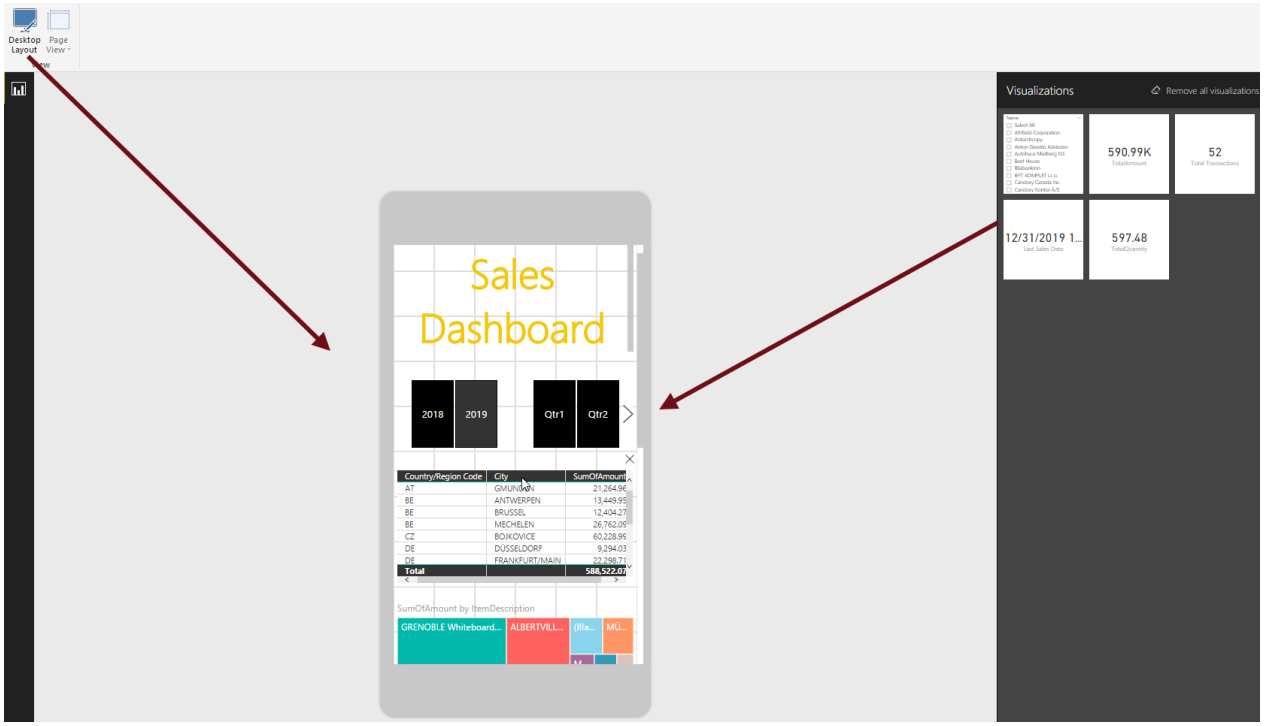
Rearrange report items

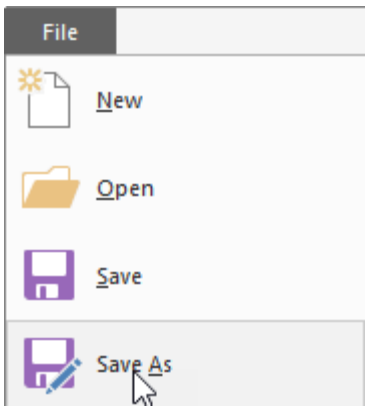
In the View tab in the ribbon, select Show Gridlines and Snap Objects to Grid:



Create Phone Layout

Select the Phone Layout in the ribbon. Then drag and drop report items to the layout:



Save Power BI Desktop file

Save your .pbix file.