

Power BI: integration with Business Central and new embedded reports out of the box

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Agenda

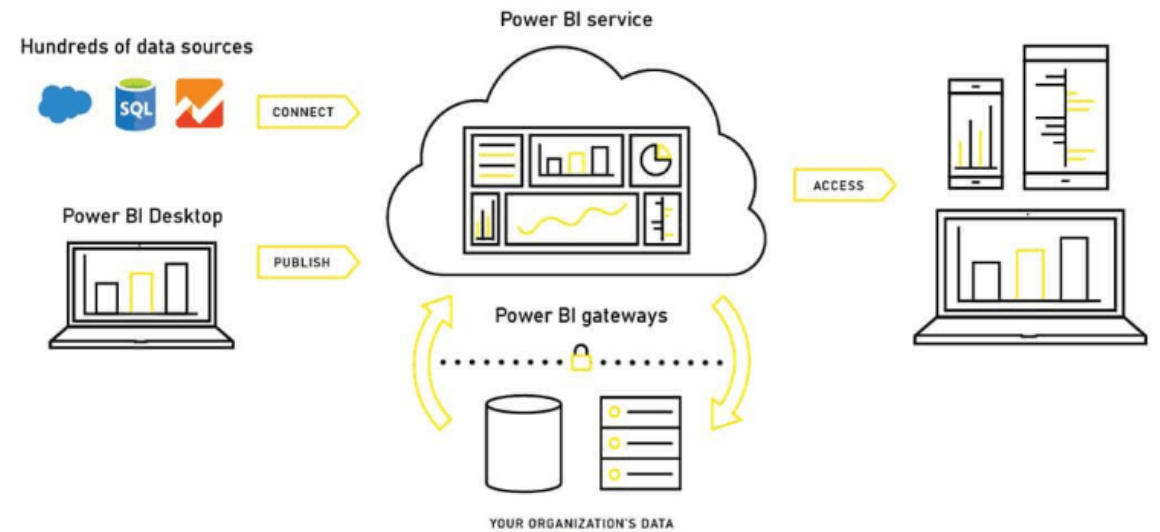
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What is Power BI?

Power BI is a collection of software services, apps, and connectors that work together to turn your unrelated sources of data into coherent, visually immersive, and interactive insights.

Your data might be an Excel spreadsheet, or a collection of cloud-based and on-premises hybrid data warehouses. Power BI lets you easily connect to your data sources, visualize and discover what's important, and share that with anyone or everyone you want.

[What is Power BI? - Power BI | Microsoft Learn](#)

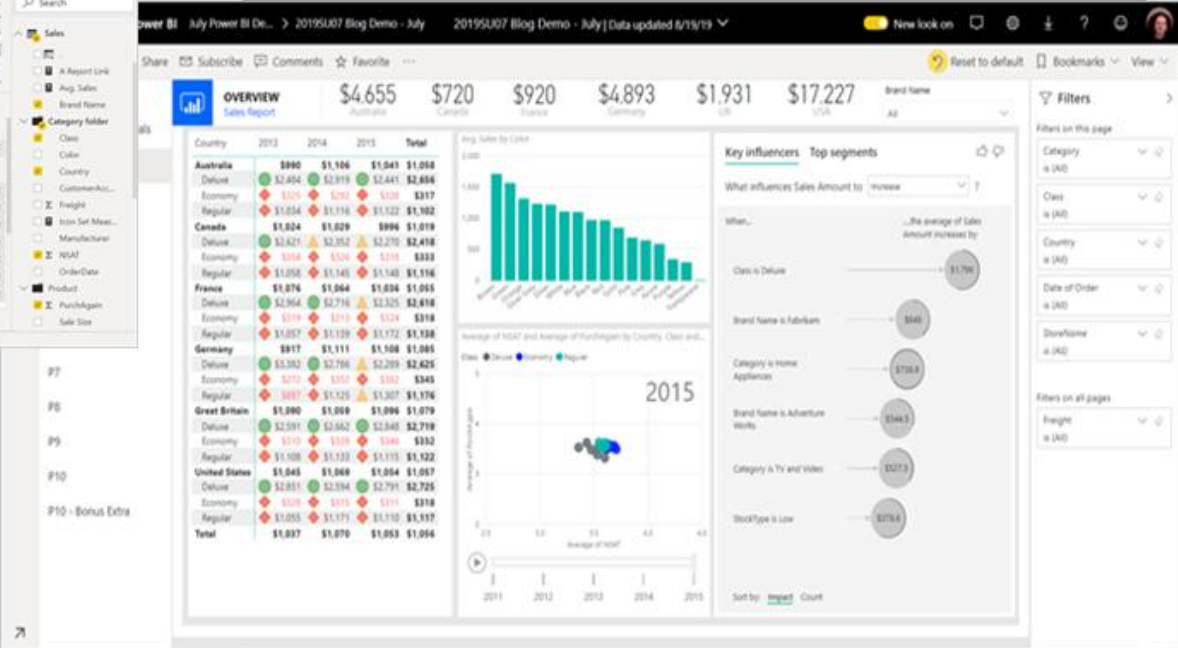


Power BI environment

Power BI Desktop



Power BI service



Power BI Mobile

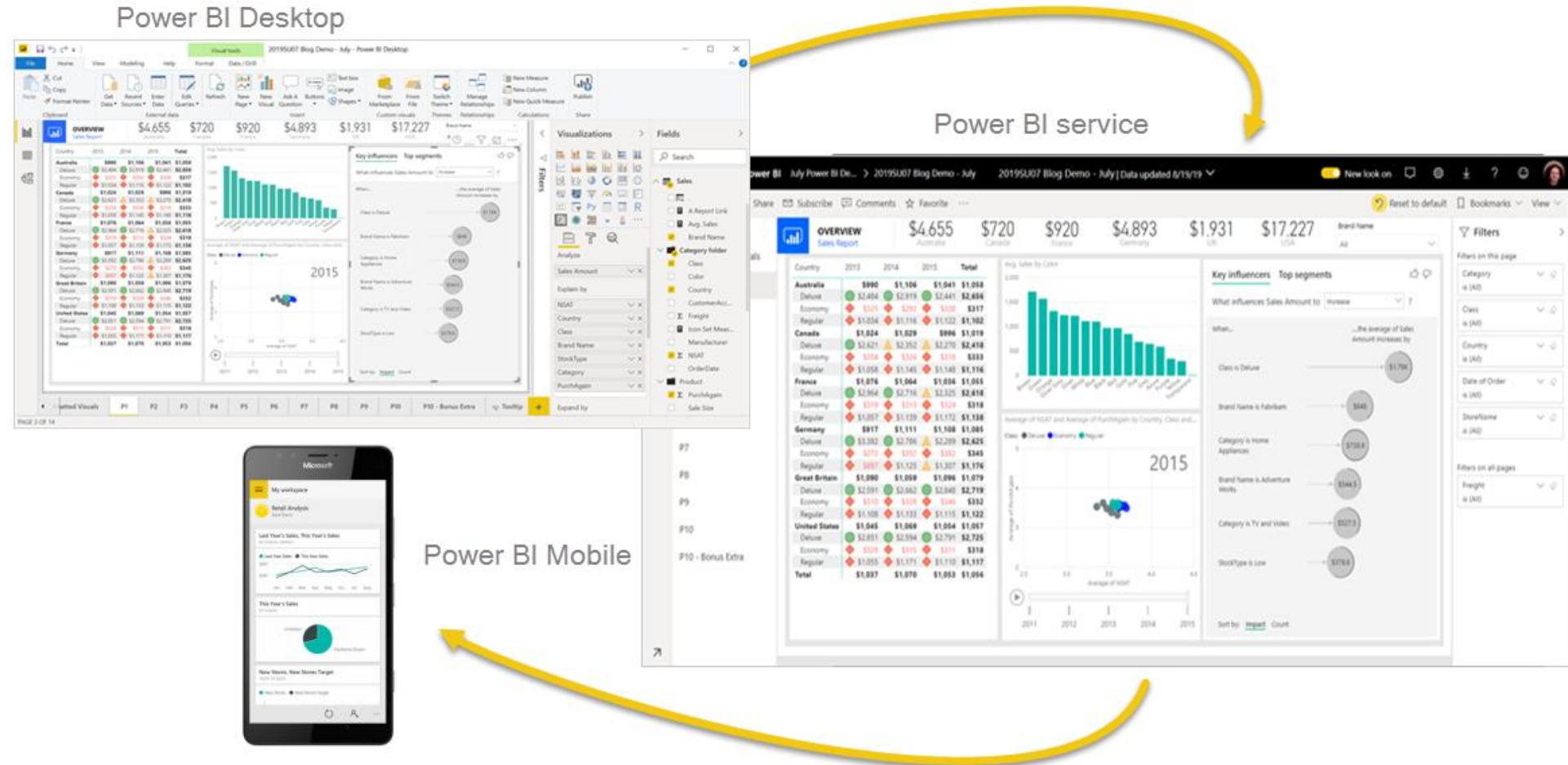


The parts of Power BI

Power BI consists of several elements that all work together, starting with these three basics:

- A Windows desktop application called Power BI Desktop.
- An online software as a service (SaaS) service called the Power BI service.
- Power BI Mobile apps for Windows, iOS, and Android devices.

These three elements—Power BI Desktop, the service, and the mobile apps—are designed to let you create, share, and consume business insights in the way that serves you and your role most effectively.



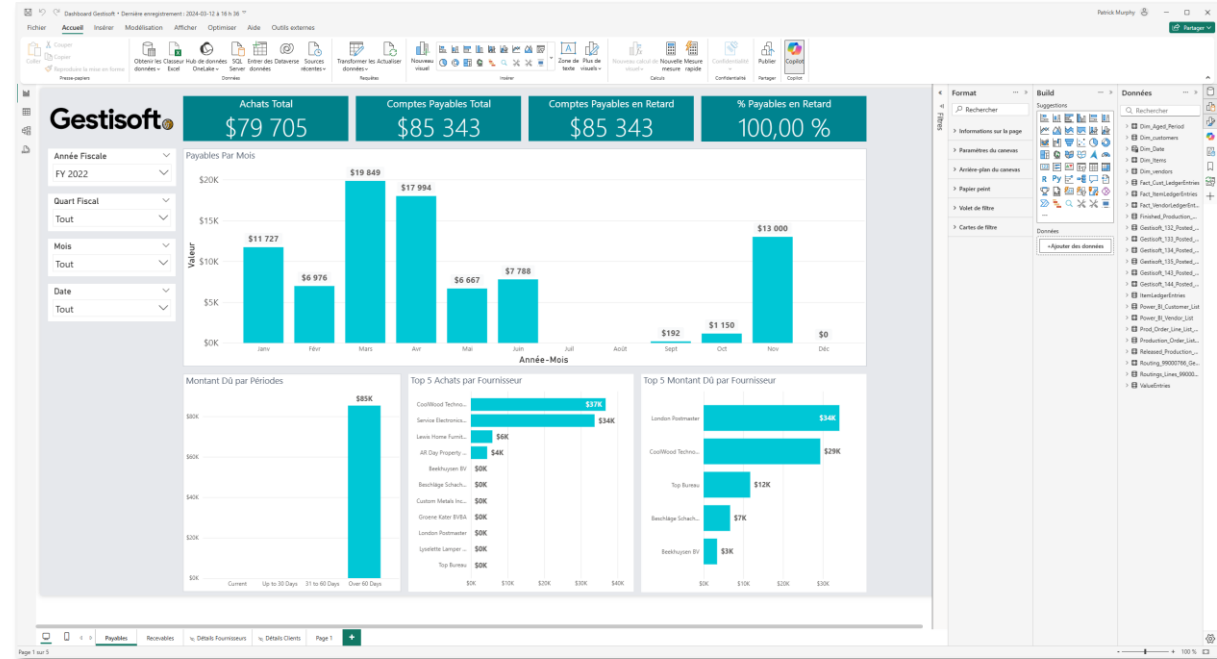
Power BI Desktop

Power BI Desktop is a free application you install on your local computer that lets you connect to, transform, and visualize your data.

Here are a few key points to help you understand its features and benefits:

- **Multiple connections:** Power BI Desktop can connect to a wide range of data sources, from Excel files to online and local databases.
- **Data transformation:** With integrated cleansing and transformation functions, you can prepare your data without the need for a developer or data specialist.
- **Interactive visualizations:** create interactive dashboards and dynamic reports to explore data in depth and uncover valuable insights.
- **Sharing and collaboration:** Once you've created your reports, you can easily share them with your team or organization via the Power BI online service, promoting informed, data-driven decision-making.

Power BI Desktop is therefore an indispensable ally for any organization seeking to leverage its data to better understand its operations and make strategic decisions.



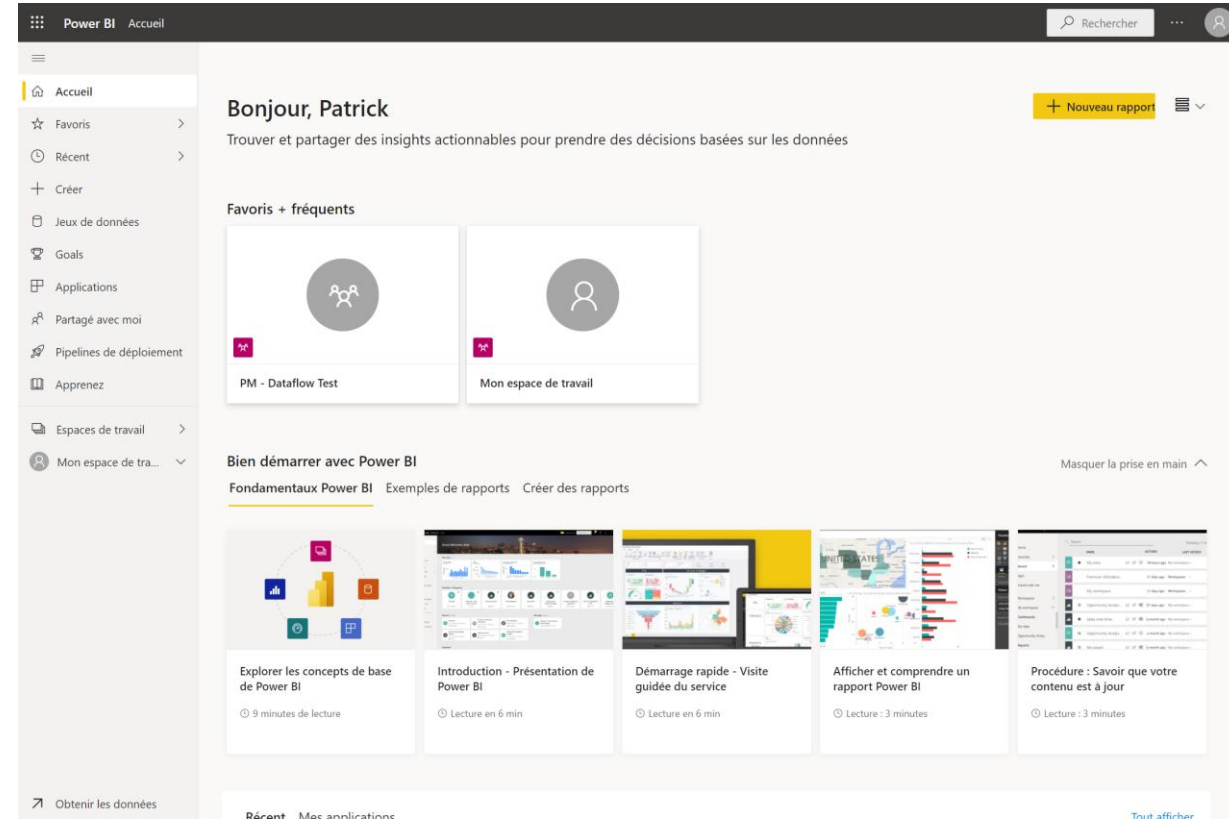
Power BI Service

Power BI is an online platform for sharing, collaborating and consulting reports and dashboards interactively and securely.

Here are a few key points:

- **Access anywhere, anytime:** The Power BI service is accessible via any web browser or mobile application, allowing you to consult your reports and dashboards wherever you are.
- **Collaboration and sharing:** You can easily share your reports with colleagues or partners, promoting effective collaboration and data-driven decision-making.
- **Automatic updates:** Dashboards and reports can be updated automatically in real time, thanks to live connections to data sources, ensuring that you always have the most up-to-date information.
- **Security and compliance:** Power BI offers advanced security features, including role-based access control and data encryption, ensuring that your sensitive information is protected.
- **Integration with other Microsoft tools:** It integrates seamlessly with other Microsoft tools such as Excel, Teams and SharePoint, enabling a seamless, consistent experience across your organization.

Power BI is therefore an indispensable tool for organizations wishing to optimize their data management and improve collaboration within their teams.



Power BI Mobile

Power BI's mobile applications enable users to consult and interact with their data on the move, directly from their smartphone or tablet.

Here are a few key points:

- **Instant access:** consult your Power BI reports and dashboards wherever you are, whenever you want, thanks to apps available on iOS and Android.
- **Interactivity and exploration:** Navigate interactively through your data and discover insights thanks to dynamic visualizations adapted to mobile screens.
- **Notifications and alerts:** Receive real-time alerts directly on your mobile device to stay informed of changes or anomalies in your data.
- **Easy sharing:** quickly share reports and dashboards with colleagues and partners via mobile applications, facilitating collaboration even on the move.
- **Enhanced security:** Power BI mobile applications offer advanced security features such as multi-factor authentication and data encryption, ensuring that your sensitive information is protected.

Power BI mobile applications are therefore essential for professionals who want to stay connected to their data and make informed decisions, wherever they are.



Power BI & Business Central

Power BI & Business Central Environment

Dynamics 365 Business Central dashboard showing various business metrics and navigation options. The dashboard includes a header with navigation tabs like Finance, Cash Management, Sales, and Purchasing. Below the header, there are several key performance indicators (KPIs) for Sales This Month, including Sales Orders, Sales Invoices, and Purchase Orders. The dashboard also features a 'Want to learn more about Business Central?' section with various links and actions.



Power BI Desktop

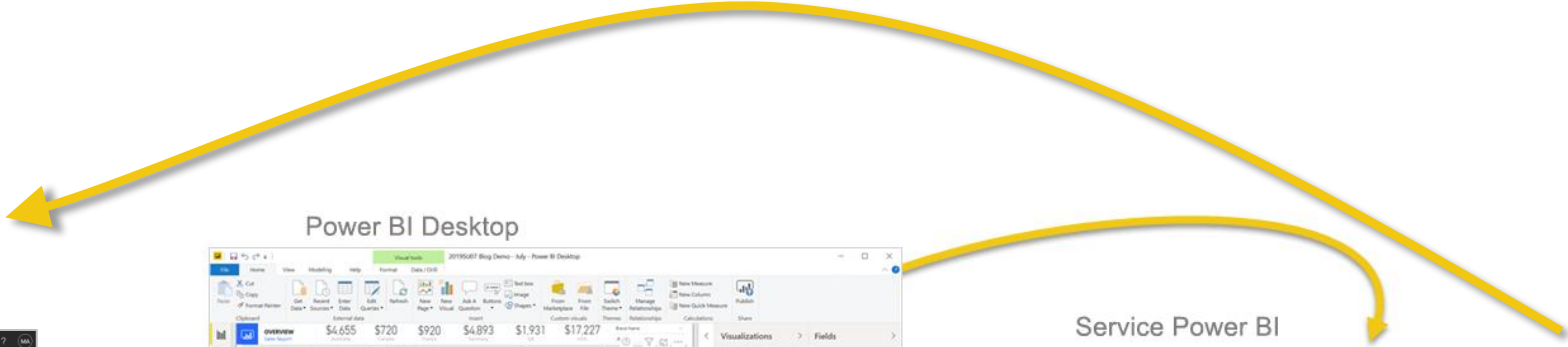
Power BI Desktop interface showing a data model, visualizations, and the Fields pane. The main view displays a bar chart and a table of data. The Fields pane on the right shows the data model structure, including tables like Sales and Sales Amount, and fields like Country, Class, and Product. The top of the interface shows a summary of key metrics: \$4,655, \$720, \$920, \$4,893, \$1,931, and \$17,227.



Power BI Mobile

Service Power BI

Power BI Service dashboard showing a data model, visualizations, and the Fields pane. The main view displays a bar chart and a table of data. The Fields pane on the right shows the data model structure, including tables like Sales and Sales Amount, and fields like Country, Class, and Product. The top of the interface shows a summary of key metrics: \$4,655, \$720, \$920, \$4,893, \$1,931, and \$17,227.



Power BI & Business Central

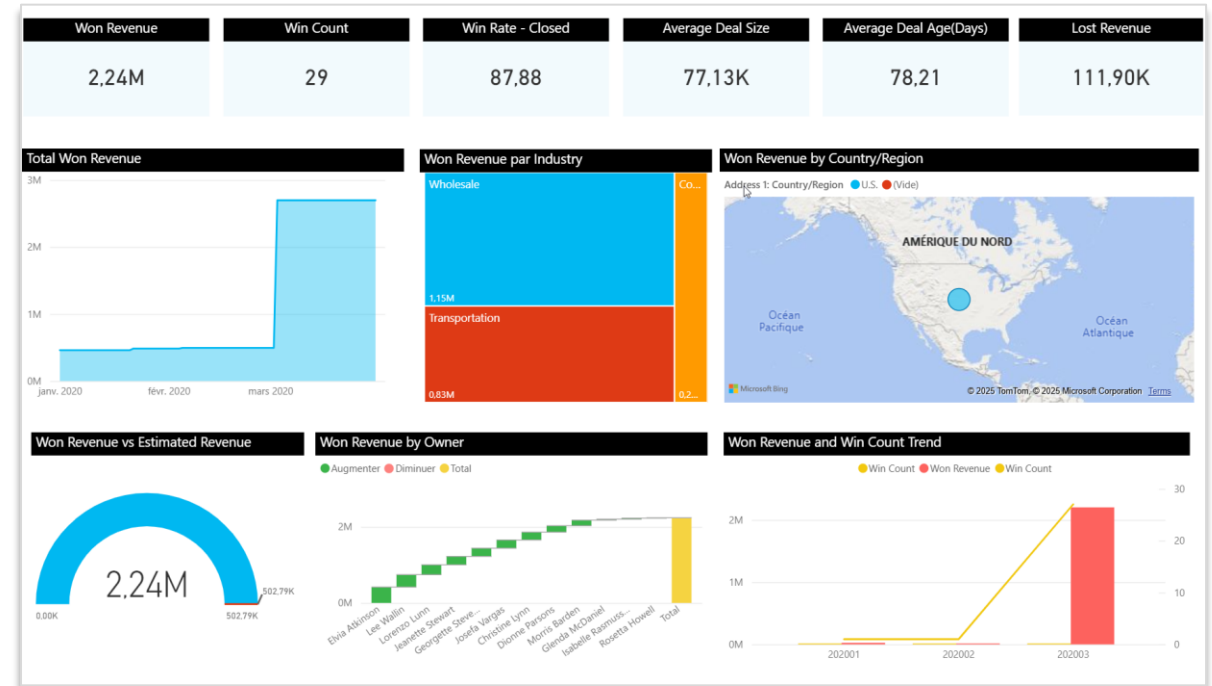
Use embedded out-of-the-box Power BI reports – Dynamics 365 CRM

Power BI Template apps make it easy to visualize and analyze the sales data with Power BI based on a standard data model.

The Sales Analytics for Dynamics 365 Sales and Process Analytics for Dynamics 365 Power BI template apps are built with a set of entities and fields that are useful for most reporting scenarios.

Dynamics 365 apps are often extended with custom fields. These custom fields don't automatically show up in the Power BI model. This documentation describes how you can edit and extend the report included in the template app to include custom fields in the Power BI model.

[Customize Power BI template apps for Dynamics 365 Sales | Microsoft Learn](#)



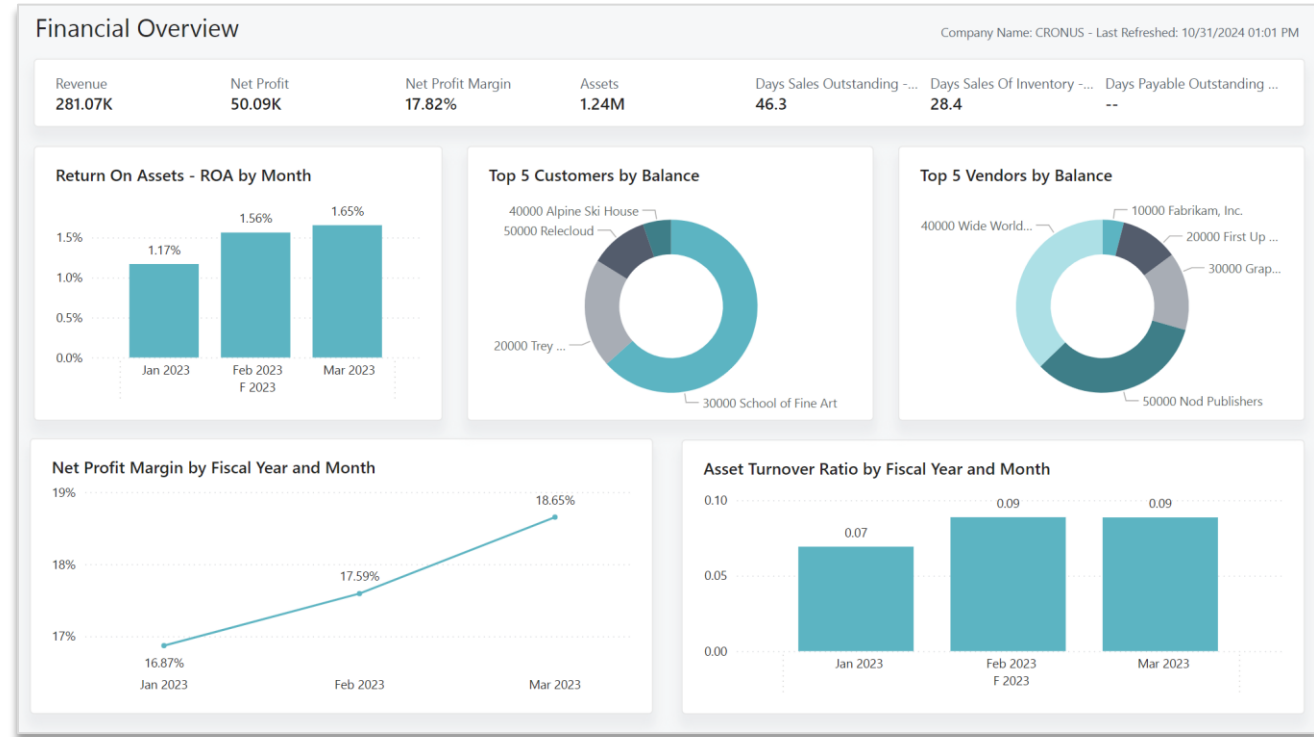
Use embedded out-of-the-box Power BI reports – Business Central

Business Central comes with numerous reporting, business intelligence (BI) dashboard and data analysis options.

This wave of releases adds many new reports for finance, sales, purchasing, inventory, manufacturing and projects.

Power BI applications are available for the following Business Central modules:

- Finance (14 reports)
- Sales (11 reports)
- Purchasing (12 reports)
- Inventory (11 reports)
- Inventory valuation (3 reports)
- Projects (7 reports)
- Manufacturing (11 reports)



[Power BI apps/reports for functional areas - Business Central | Microsoft Learn](#)

Installing Power BI applications for Business Central

To install the Power BI applications for Business Central, you need the following items:

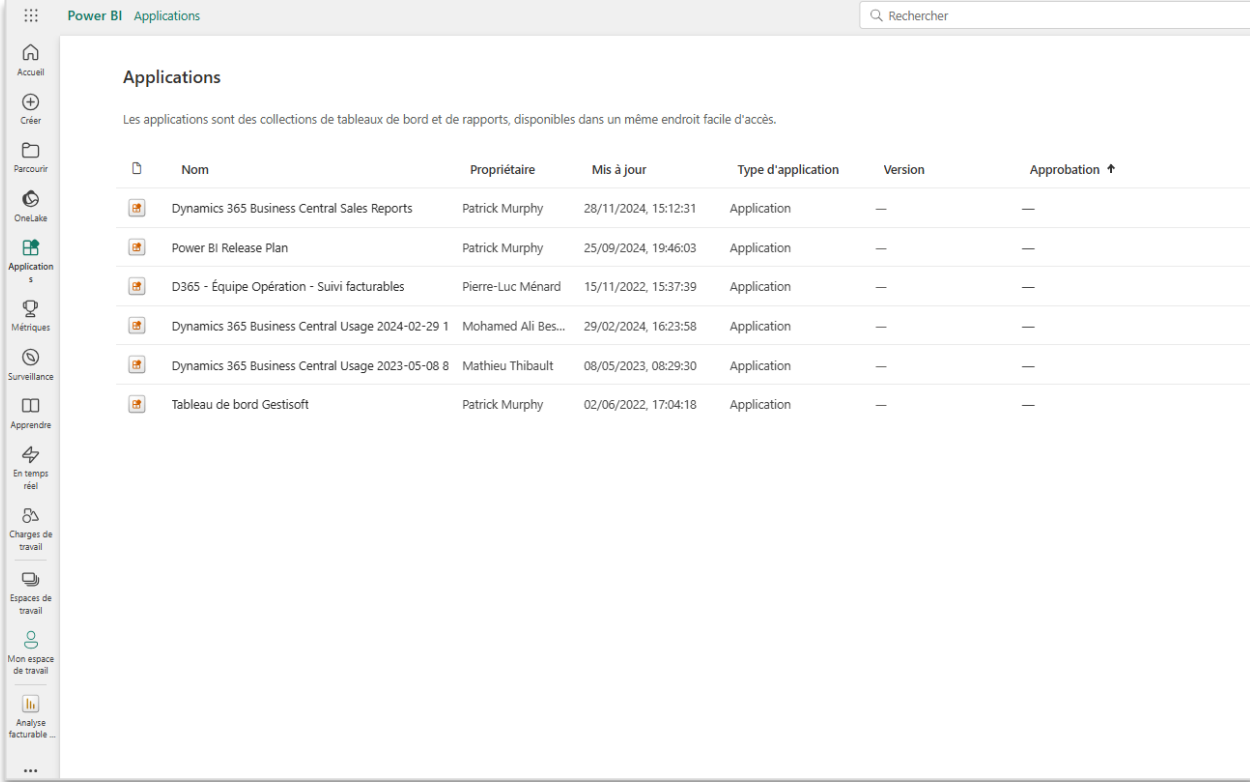
- An environment in Business Central online (it comes ready to integrate with Power BI.)
- Entitlements/permissions in Power BI to:
 - Install template apps from AppSource.
 - Use shared workspaces.

The prerequisites for Power BI can be met with a Power BI PRO license for the following users:

- The user who installs the Power BI template app.
- The user who refreshes the data.
- Each user who accesses the reports.

An alternative to using Power BI PRO licenses is to use Power BI or Microsoft Fabric Premium capacity.

[Installing Power BI apps for Business Central - Business Central | Microsoft Learn](#)

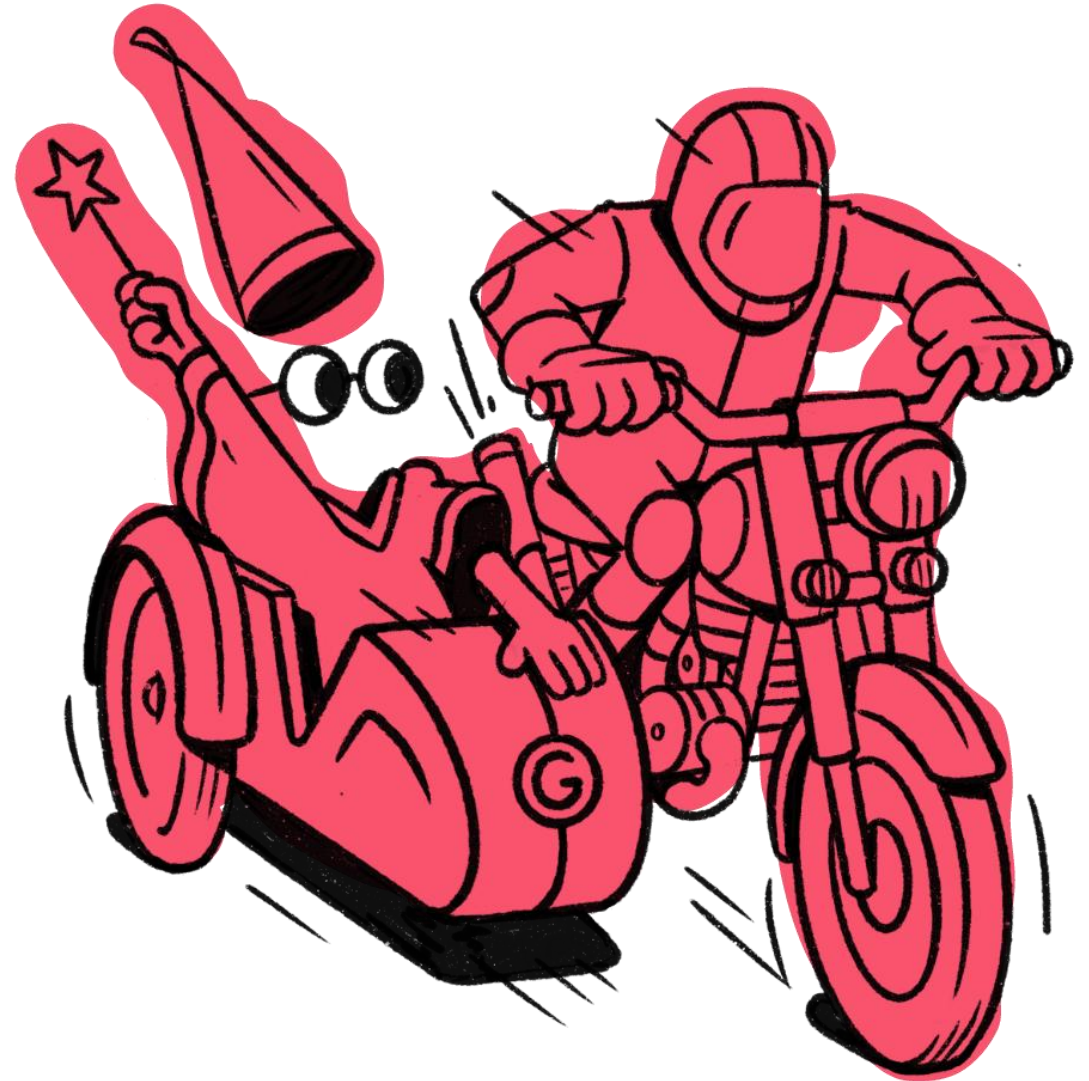


Nom	Propriétaire	Mis à jour	Type d'application	Version	Approbation ↑
Dynamics 365 Business Central Sales Reports	Patrick Murphy	28/11/2024, 15:12:31	Application	—	—
Power BI Release Plan	Patrick Murphy	25/09/2024, 19:46:03	Application	—	—
D365 - Équipe Opération - Suivi facturables	Pierre-Luc Ménard	15/11/2022, 15:37:39	Application	—	—
Dynamics 365 Business Central Usage 2024-02-29 1	Mohamed Ali Bes...	29/02/2024, 16:23:58	Application	—	—
Dynamics 365 Business Central Usage 2023-05-08 8	Mathieu Thibault	08/05/2023, 08:29:30	Application	—	—
Tableau de bord Gestisoft	Patrick Murphy	02/06/2022, 17:04:18	Application	—	—

Services provided by Gestisoft

- Power BI training
 - Introduction to Power BI and its features
 - Advanced report development
- Training tailored to customer needs
- Installation and configuration of ready-to-use reports
- Development of customized reports

You can contact Kaelie from the Customer Success team directly to find out more!



Gestisoft