



# **Advania Power BI Reports for Business Central Setup and Instructions**

Advania



# ADVANIA POWER BI REPORTS FOR BUSINESS CENTRAL

The following instructions will guide you through the process of installing the Power BI report for Business Central.

## 1 PREREQUISITES:

- Purchase and assign **Power BI Pro license**
- From BC Install and configure the **Advania Power Platform Connection** to use our standard reports.

There is a different Setup and Instruction guide for the Advania Power Platform Connection app. It can be found here: [Advania Power Platform](#)

## 2 ABOUT THE REPORT

This report can be directly integrated into your Dynamics 365 Business Central system, enabling you to conveniently extract data and create customized reports using your Sales data. Our carefully selected data set provides a solid foundation for reporting.

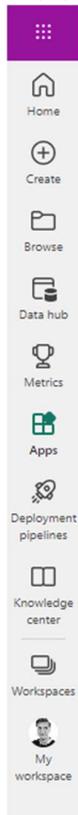
To use the report, you need to install the **Advania Power Platform Connection app** in Business Central to use this report.

## 3 INSTALLING THE POWER BI REPORT APP

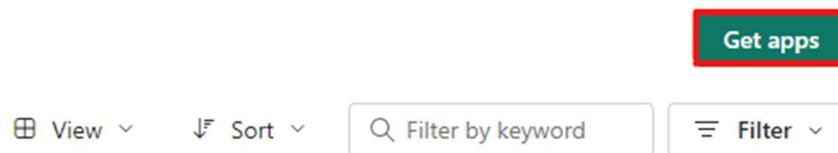
To install the app and utilize the report you need to follow these steps.

- Navigate to <https://app.powerbi.com>

- In the navigation pane (left hand side on the screen) select **Apps**

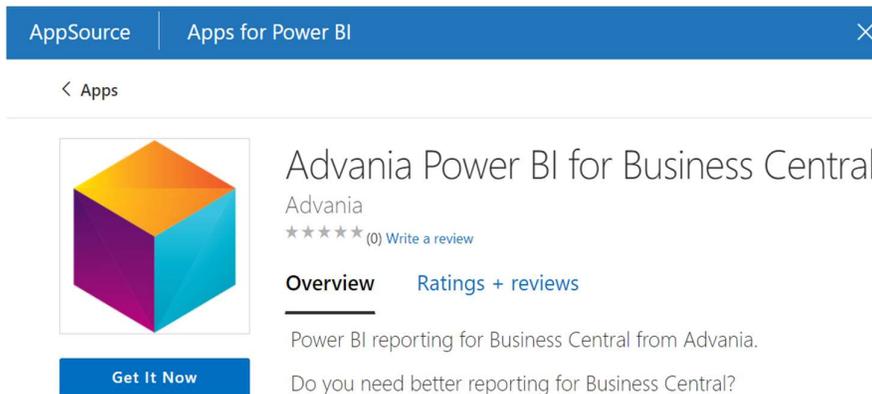


- In **Apps**, navigate to the top right corner and select **Get Apps**



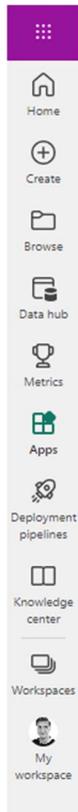
- Search for **Advania Power BI Reports for Business Central** and click on the app

- From the new window, click on **Get It Now**
  - After completing all the prerequisites and clicking on the Install button, you can connect the report to your data

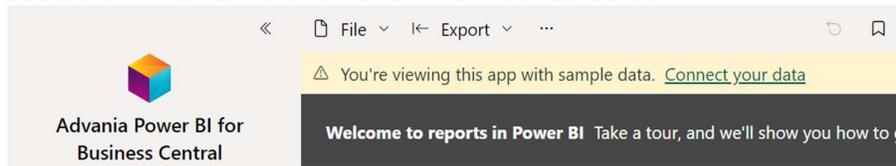


#### 4 GET STARTED SETTING UP YOUR APP

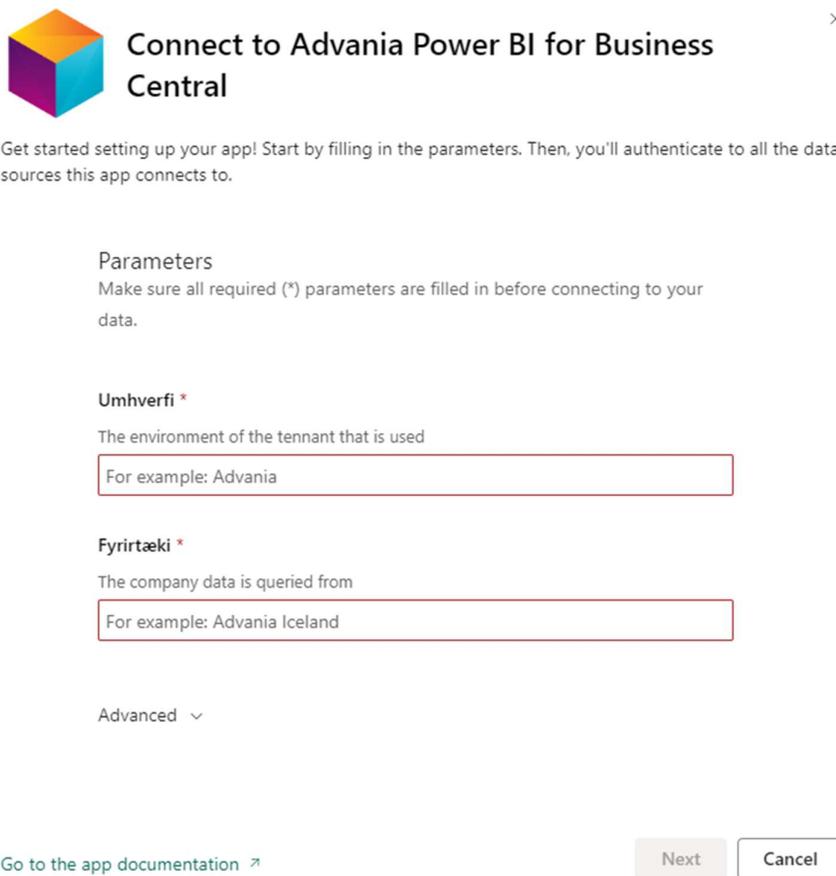
- In the navigation pane select **Apps**



- Select the APP called Advania Power BI for Business Central



- Click on the "Connect to your data" message
- From the connection window, fill in the parameters required to connect to your BC system



**Connect to Advania Power BI for Business Central**

Get started setting up your app! Start by filling in the parameters. Then, you'll authenticate to all the data sources this app connects to.

**Parameters**  
Make sure all required (\*) parameters are filled in before connecting to your data.

**Umhverfi \***  
The environment of the tennant that is used

**Fyrirtæki \***  
The company data is queried from

Advanced ▾

[Go to the app documentation](#) ↗

**NOTE:** These parameters can be found in Business Central when you are logged in:



The red boxes in the above image contain the necessary information for the parameters. The environment can be found in the top right corner of the window, while the company is listed in the header pane towards the middle/right.

- Click on the "Sign in and connect" button and authenticate to all the data source (BC)



## Connect to Advania Power BI for Business Central

You are connecting to

ExtensionDataSourceKind

ExtensionDataSourcePath



Authentication method

Privacy level setting for this data source [Learn more](#)

[Go to the app documentation](#) ↗

- The authentication method is OAuth2

## 5 THE REPORT

The Power BI Reports consists of eight sheets that display various visuals of both sales and finance data.

Sales:

- The first sheet contains an overview of the sales data, providing a broad overview of the sales performance and trends.
- The second sheet is based on items, showcasing data on the popularity and performance of individual products or items.
- The third sheet is centered on customers, providing insights into who are the most important customers and their breakdown based on key performance indicators.

- The fourth sheet focuses specifically on orders, providing detailed information on the number of orders placed, their value, and other relevant details.

Finance:

- The fifth sheet contains an overview of financial P&L data providing a broad overview of performance and trends.
- The sixth sheet contains the P&L and relevant key figures.
- The seventh sheet contains the Balance Sheet and relevant key figures.
- The final sheet contains the finance transaction data by document no. The user can drill-down to financial transactions from the other sheets.