November 3, 2020 · Derek Adam

Power BI Template App for SalesForce

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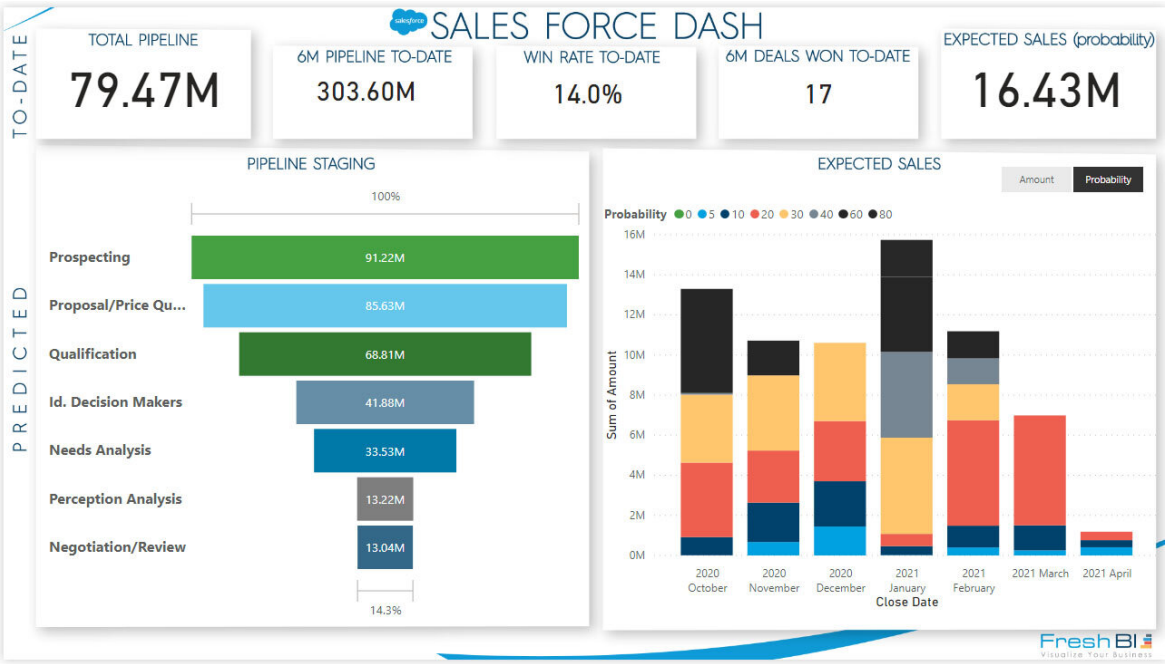

So, what is a Power BI Template App?

A Power BI Template App is a published Power BI solution that can be used by any company that has the data platform for which the Template App was created.

Wouldn't it be nice to pick your entire Power BI Solution off the shelf - one crafted for your specific business needs and your specific data structure. Power BI Template Apps are designed to be such an out-of-the-box solution and this blog post is an example of such for a Power BI Solution for Salesforce.

Inside of this Power BI Template App you will find all of the necessary elements for creating a simple pipeline model for Salesforce. This template is meant to be an entry level solution for Salesforce and Power BI, showcasing the basics. This Template App could provide a starting point for more advanced reporting.

Power BI Template App - Salesforce Dash

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About FreshBI

Operating throughout USA and Canada, FreshBI is a boutique Microsoft Partner using Power BI to unlock the value trapped in your data so that your business can succeed.

Exploring and Connecting

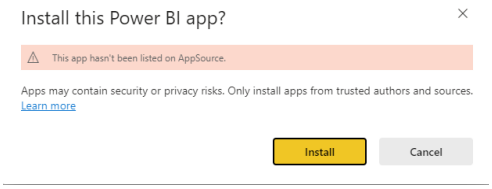
Exploring and connecting your data to the template app is simple and intuitive. First launch the app. You will be greeted with the window is Step #1 below.

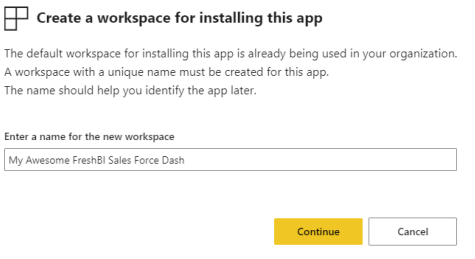
If you just want to explore the app with the existing sample data inside select the 'Explore app' options. To connect your own data choose the 'Connect' option.

When you select Connect, you will be prompted to input your Salesforce credentials to which you would like to connect. Follow those steps and your data will flow seamlessly into the app and you can begin using immediately.

The template app also comes with a workspace so that you can customize and share your changes with others.

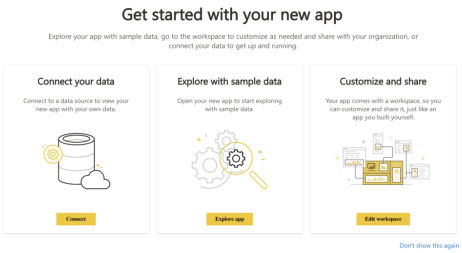
STEP #1: This link will take you to this screen that will confirm you'd like to Install the Power BI Template App for Salesforce.

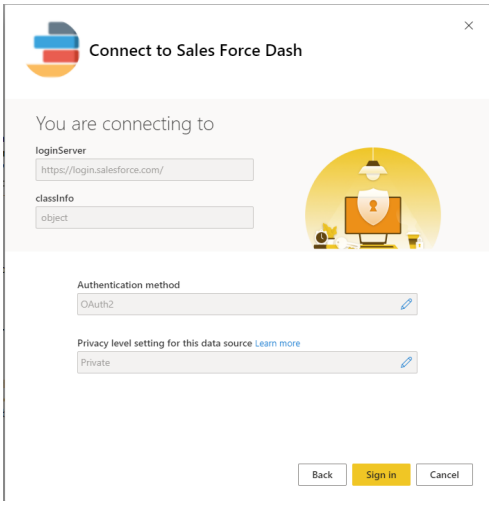




STEP #2: Create and name the workspace in the Power BI Service that will host your Power BI Template App for Salesforce.

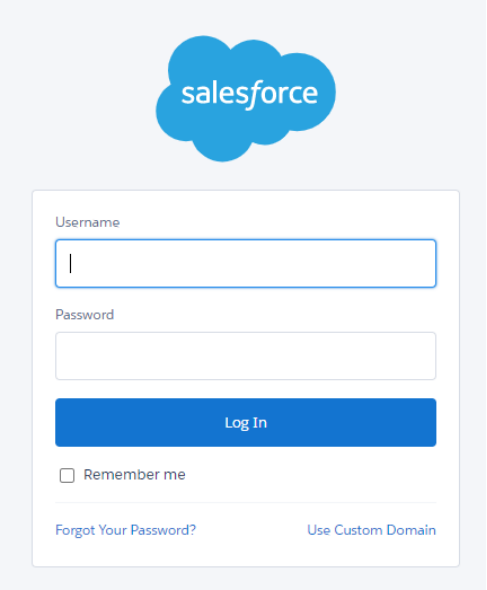
STEP #3: Hit the 'Connect your data' button. This will use sample data in your dashboard





STEP #4: Click “Sign In” to be taken to Salesforce login

STEP #5: Enter your desired Salesforce credentials



How To Use This Template App

Pipeline Overview

The purpose of the Power BI Template App is to aid your business decisions around your Sales Pipeline. It does this through displaying your Sales Pipeline in various visual ways. This page has two sections and are labeled on the left side of the screen.

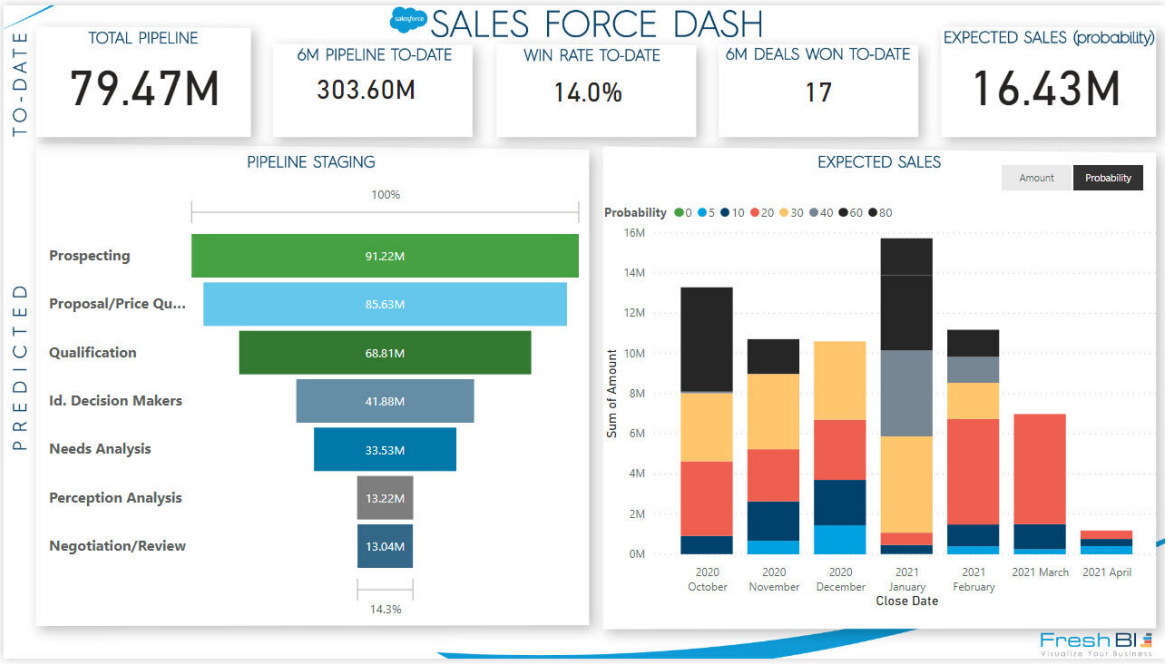
Dashboard Northern Hemisphere: includes big picture KPI’s for a quick glance including a six month win rate and amount won KPI.

- Total Pipeline in $
- Total Amount that has hit our Pipeline over the past 6 months

- Expected Sales (Entire Pipeline x Probability of Close for each deal)

Dashboard Southern Hemisphere: shows the predicted pipeline for the next few months and allows you to visualize data through stage names and amounts. You can select to see the probability amounts on the Expected Sales graph to get an idea of what your next few months will look like!

- **Pipeline Staging**: Visualize your entire Pipeline in order of the value attributed to each stage of the sale
- **6 Month Pipeline on the Closing Month, segmented by Stage**: See your predicted close dates for all deals, segmented by their current stage of the sale.



Wrap Up

We've showed you a useful example above but just for a minute, imagine the possibilities for your business…..

Imagine having Cross-Platform / Cross-Business packaged Power BI solutions that can be shelved and automatically deployed by any team member, anytime all while maintaining BI best practices encapsulated in your organizational Power BI Template Apps.

Click Here to get the Salesforce Template App for Power BI

Power BI Coach

EDUCATION:
M.M. from The University of Texas at San Antonio

EXPERIENCE:
Extensive problem solving and abstraction. Software development, report design.

COMPANY:
FreshBI

Team FreshBI is an innovation machine and the blogs that Derek writes emanate from the innovations that FreshBI does for its customers.

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PowerBI Distribution And Sharing
October 1, 2020

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