# Installation instructions

1. Install the **Power BI Essentials - Sales** data connector on your Microsoft Dynamics 365 Business Central solution. It can be downloaded from this location on Microsoft App Source: Microsoft AppSource: Power BI Essentials - Sales

   This data connector will automatically create the queries in Microsoft Dynamics 365 BC that will be used as source data for the Power BI template.

2. After installation of the **Power BI Essentials - Sales** app:

   • go to your online instance of Microsoft Dynamics 365 Business Central

   • open the *Web Services* page
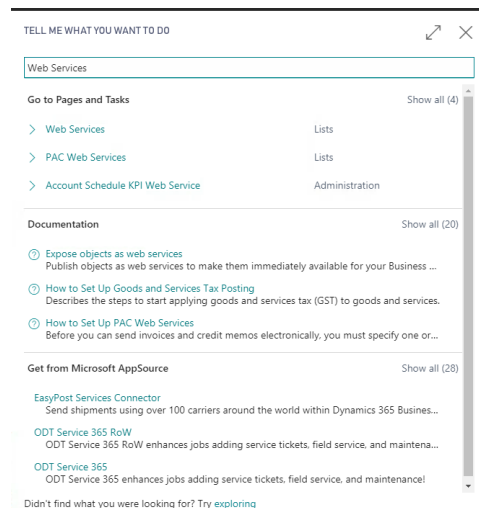
   • search for the new Queries generated from the app installed at step 1. The queries begin with the keyword "NCA "

   • click on one of the selected rows, and go to the *OData URL* column

OData URL column value example:

"http://server:15048/BC150/OData/Company('CRONUS%20Canada%2C%20Inc.')/Item"

- copy the value in Notepad and keep the value up to the last "/" including. This will be the value that will be used in the Power BI Template as an input parameter.

Input parameter for the Power BI Template from the above example of OData URL would be:

"http://server:15048/BC150/OData/Company('CRONUS%20Canada%2C%20Inc.')/"

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3. Install the **Power BI Essentials - Sales Template** in your Power BI service account. The template can be downloaded from this location on Microsoft App Source: Microsoft AppSource: Power BI Essentials - Sales Template

4. When opening the **Power BI Essentials - Sales Template** in Power BI service, when choosing:

   a. *Explore App* you will be able to review our sales reports while being connected to our sample data.

   b. *Connect* will start the wizard for connecting the template app to your own data. However, to do so, you have to first install the **Power BI Essentials - Sales** data connector as mentioned above at steps 1 & 2.

   Connect will open a new window where you have to insert:

   - under the *ODATA URL* parameter - the value of the aforementioned input parameter retrieved from your instance of Microsoft Dynamics 365 Business Central as shown at step 2

   - under *StartYear, EndYear* and *FiscalStartMonth* insert values relevant for your business:

     - the start year of your current calendar

     - the end year, that has to be at least the current year

     - the first month of your fiscal year, if it is the case. It has to be expressed as a whole number. In case you do not use a fiscal calendar, you can just insert 1 (so the calendar and fiscal year will

match). Please keep in mind that the calendar in the current template is not set up to support 4-4-5 or 4-5-4 fiscal calendars.

The next window will ask for an authorisation method, this way the template will know how to connect to your source data. Here, you have to select in each window requested the same method used to connect to your instance of Microsoft Dynamics 365 BC.

e.g.

if you connect to Microsoft Dynamics 365 Business Central with your organisational account then you have to select *Organizational account* for each window and each time. You will be redirected to another window where you will need to input the email and password you use to connect to Microsoft Dynamics 365 Business Central account.

if you connect to Microsoft Dynamics 365 Business Central with an username and password, then you have to choose *Basic* for each window that appears and insert the respective user and password to each window where you are prompted.

Once the template is connected to your source data then you can use any of our fields created, change or add dashboards, schedule a refresh inside the Power BI Service.