

DYNAMICS CON PRESENTATION

DYNAMICS CON LIVE

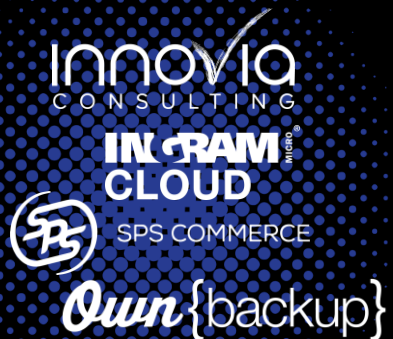


**SEPTEMBER 14-16,
2022**



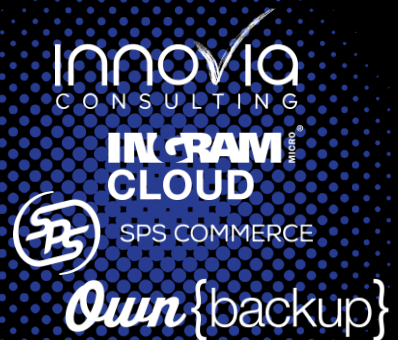
INSIGHTS AVAILABLE IN A DAY WITH POWER BI

• TANYA HENDERSON & BELINDA ALLEN



**DYNAMICSCON
LIVE**

Action Packed Session!



Agenda

- Power BI where you work
- Power Automate & Power BI
- Excel & Power BI
- Power Apps in Power BI
- Power BI Apps & Financials

About Belinda Allen

From Charleston,
SC

Microsoft Partner

Microsoft MVP

Microsoft MCT

Co-Authored 2
books

I love learning

I love hobbies

- I lived the longest in New York City

- Smith & Allen Consulting, Inc. – 31 years

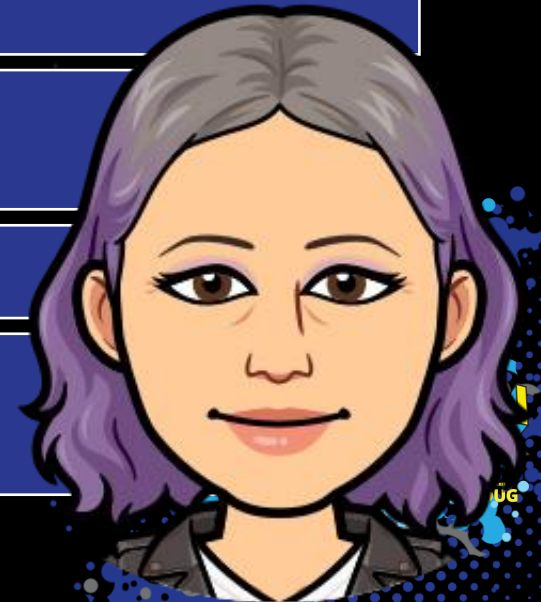
- 11 years / 5 years GP and 6 years Power BI

- 12 years (with a hiatus in the middle)

- BI and Dynamics GP

- Technology, Wood Turning, Cooking

- Newest hobby: Pickleball
- Favorite: Knitting/Crocheting



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About Tanya Henderson

From St Louis,
MO

Microsoft
Partner

Microsoft
Products

I love learning

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- I have lived in: MO, AL, TN, FL, NV, VA and Utah

- Tess Team – 22 years

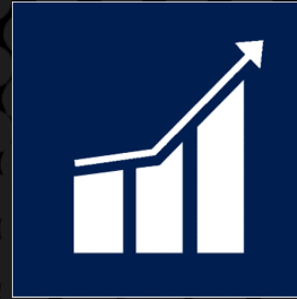
- 22 years GP / 5 years BC and 6 years Power BI

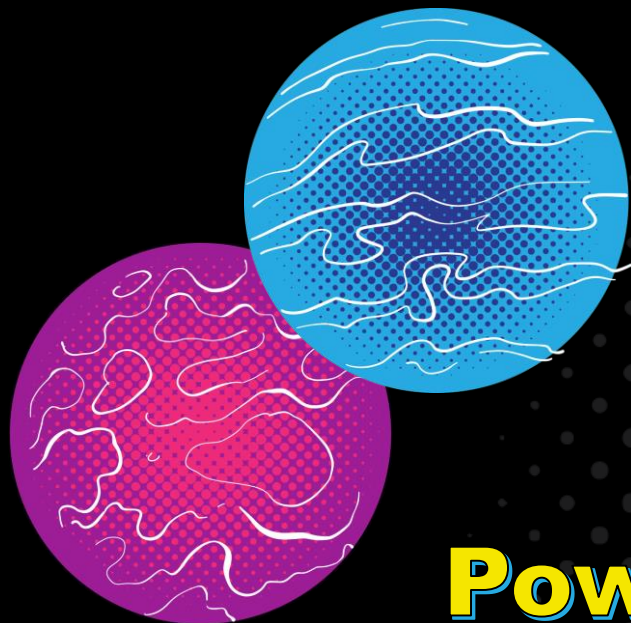
- BC, Power Bi and Baking

- Newest hobby: Whitewater Kayaking
- Favorite: Snowboarding and Golf

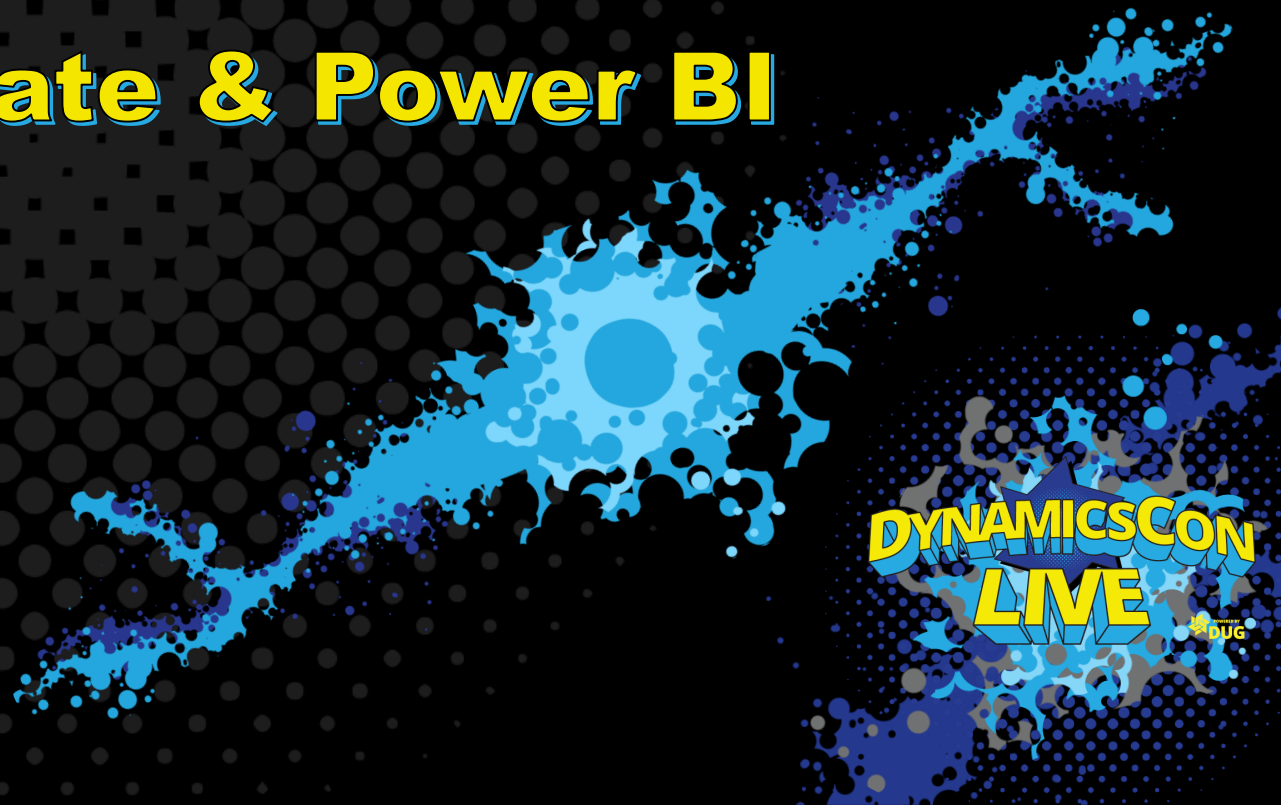
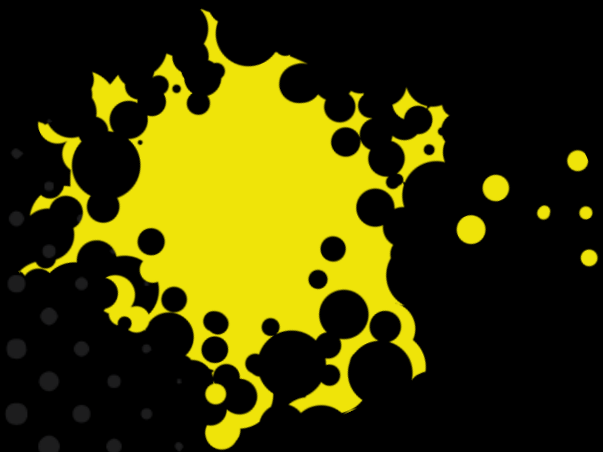
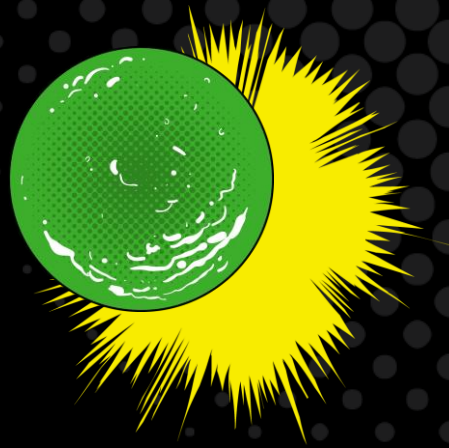
SCON

Power BI where you work





Power Automate & Power BI




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Dashboard Alerts


← Trigger a flow with a Power BI data-driven alert

Undo Redo Comment

 When a data driven alert is triggered

* Alert Id

↓

 Send an email (V2)










* To


B Belinda@msbelindaallen.onmicrosoft.com

A AdeleV@msbelindaallen.onmicrosoft.com

* Subject

* Body

Font 12 **B** *I* U         

 Tile URL

[Show advanced options](#)

+ New step Save

Email from Power BI

Send an email (v2)

*To: User email x

*Subject: Re: Sales Order Number - Power BI data ... x

*Body:

Font 12 B I U [link icon] [image icon] [code icon]

Dear Power BI data Full Name x

Thank you for your order. We apologize for the delay. Your order will be shipped in Power BI data Days Until Shipped x day(s).

Thanks for your business

Add dynamic content

Show advanced options

Add an action

+ New step Save

Add dynamic content from the apps and connectors used in this flow.

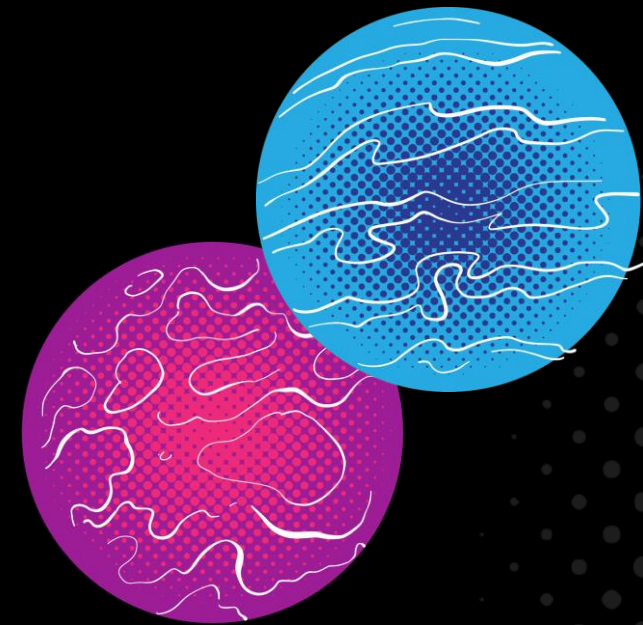
Dynamic content Expression

day

Power BI button clicked

Power BI data Days Until Shipped

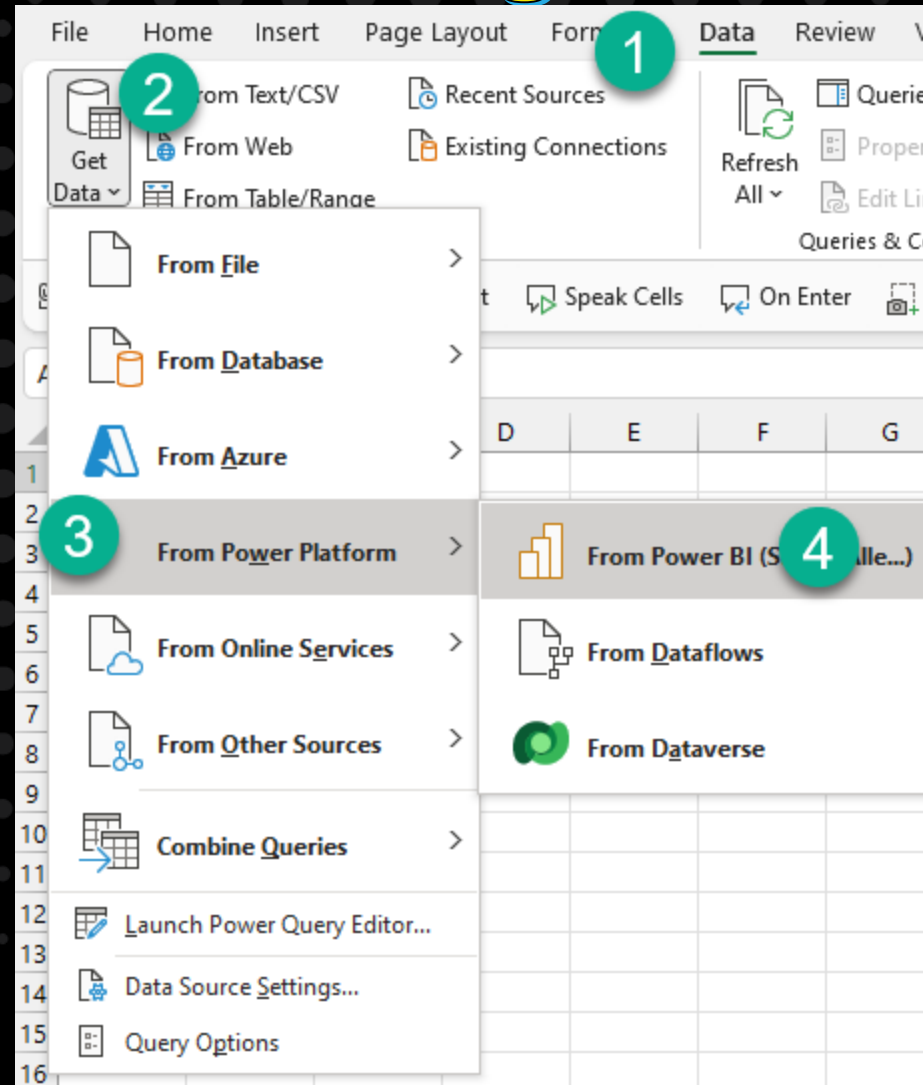
Excel & Power BI



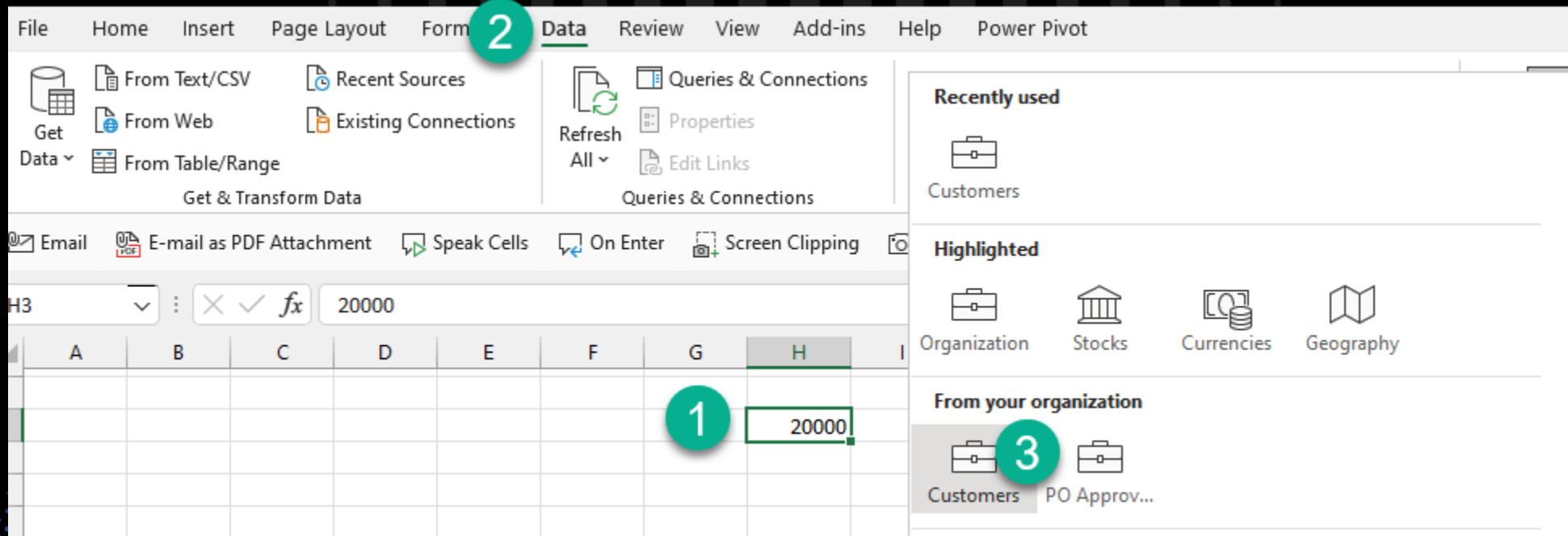
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Excel using Dataset



Organizational Types in Excel



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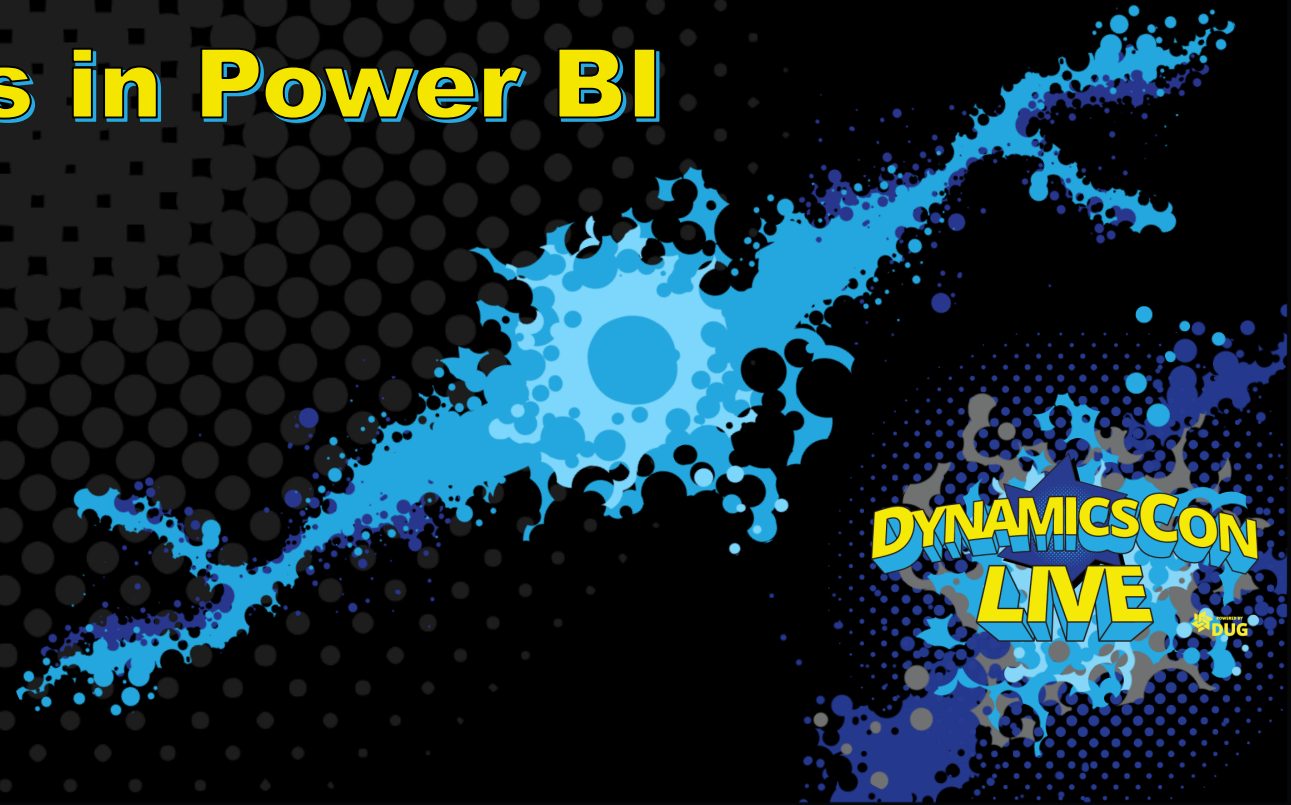
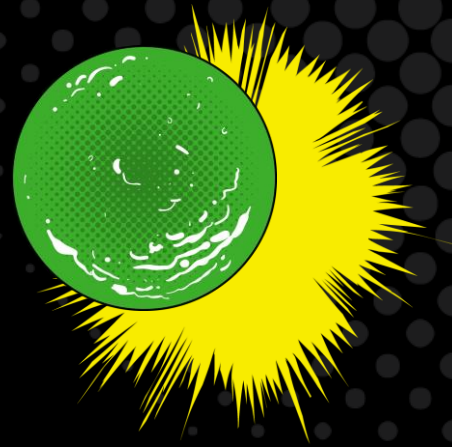
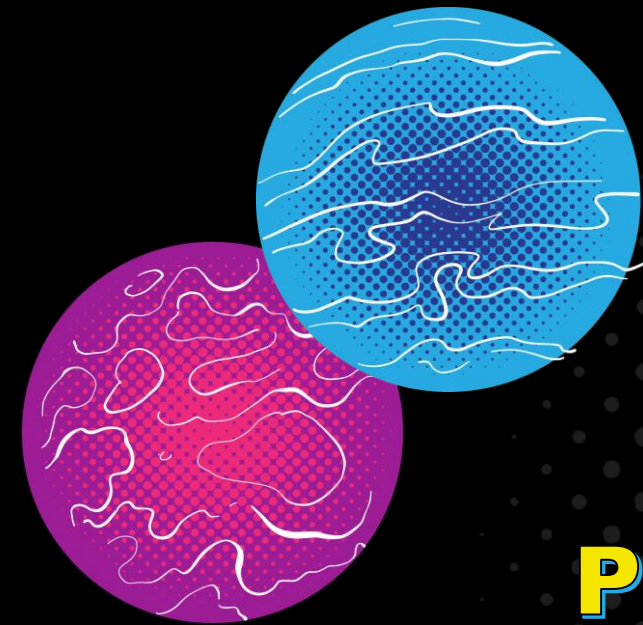
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Power Apps in Power BI



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Change Customer Credit Limit App

Export Share Chat in Teams Get insights Subscribe Edit

Document QTEST1028 on CREDIT Hold for Snoop Meisters

Details						
Customer ID	SOP	Hold	SOP Date	Age (Days)	Ship Date	Ship (Days)
SNOOP	QTEST1028	Credit Check	9/9/2021	54	11/19/2021	17

(Blank)
Salesperson

(Blank)
Hold Status

(Blank)
Posted Balance

(Blank)
Less: Unposted Pmts

(Blank)
Plus: Unposted Inv

(Blank)
Plus: Open SOP Inv

AR Summary				
Current	0-30 Days	31-60 Days	61 and Over	Customer Balance

(Blank)
Last Payment Date

(Blank)
Last Statement Date

(Blank)
Credit Limit

(Blank)
Last Payment Amt

(Blank)
High Balance LTD

(Blank)
Available Credit

Remove Hold in Dynamics GP

SOP Document Number

SOP Hold ID

* Confirm by entering REMOVE

Remove

This is a sample screenshot of an app in Power BI, not what I'll be demoing.

Power BI Apps & Financials

Income Statement Summary 8/20/2021 - 8/19/2022 in US Dollars

Income
310,888.78

COGS & Inventory
245,798.60

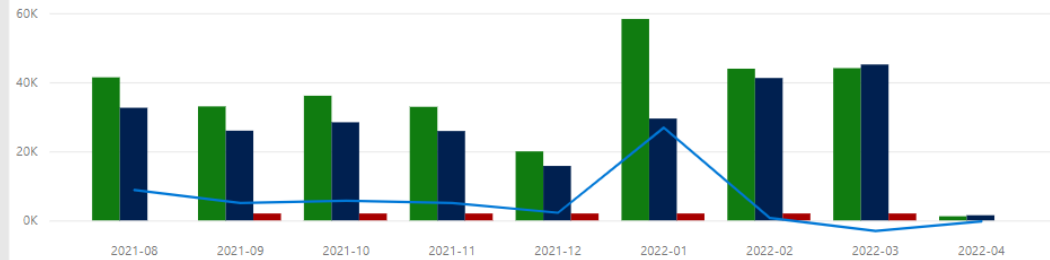
Expenses
14,000.00

Net Profit
50,919.48

Fiscal Period
☐ 2022-08
☐ 2022-07
☐ 2022-06
☐ 2022-05
☐ 2022-04
☐ 2022-03
☐ 2022-02
☐ 2022-01
☐ 2021-12
☐ 2021-11
☐ 2021-10
☐ 2021-09
☐ 2021-08

GL Amount and Net Profit by Fiscal Period and Account Category

Account Category ● 4-Income ● 5-Cost of Goods Sold ● 6-Expenses ● Net Profit



Breakdown by Subcategory

Account Category	Account Subcategory	2021-08	2021-09	2021-10	2021-11	2021-12	2022-01	2022-02
4-Income	Income, Product Sales	41,815.60	33,314.50	36,420.80	33,181.20	20,215.30	58,692.20	59,479.40
	Income, Services							-15,178.23
	Sales Discounts	-402.55	-313.37	-329.69	-296.27	-237.30	-364.79	-380.13
	Total Category	41,413.05	33,001.13	36,091.11	32,884.93	19,978.00	58,327.41	43,921.04
5-Cost of Goods Sold	Materials	32,610.50	25,979.10	28,402.50	25,874.60	15,764.40	29,487.40	41,226.70
	Total Category	32,610.50	25,979.10	28,402.50	25,874.60	15,764.40	29,487.40	41,226.70
6-Expenses	Rent Expense		1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
	Salaries Expense		1,000.00	1,000.00	1,000.00	1,000.00	1,000.00	1,000.00
	Total Category		2,000.00	2,000.00	2,000.00	2,000.00	2,000.00	2,000.00

Net Profit by Customer Group



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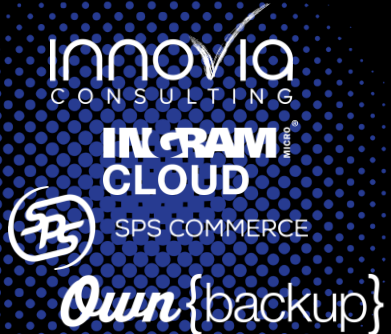
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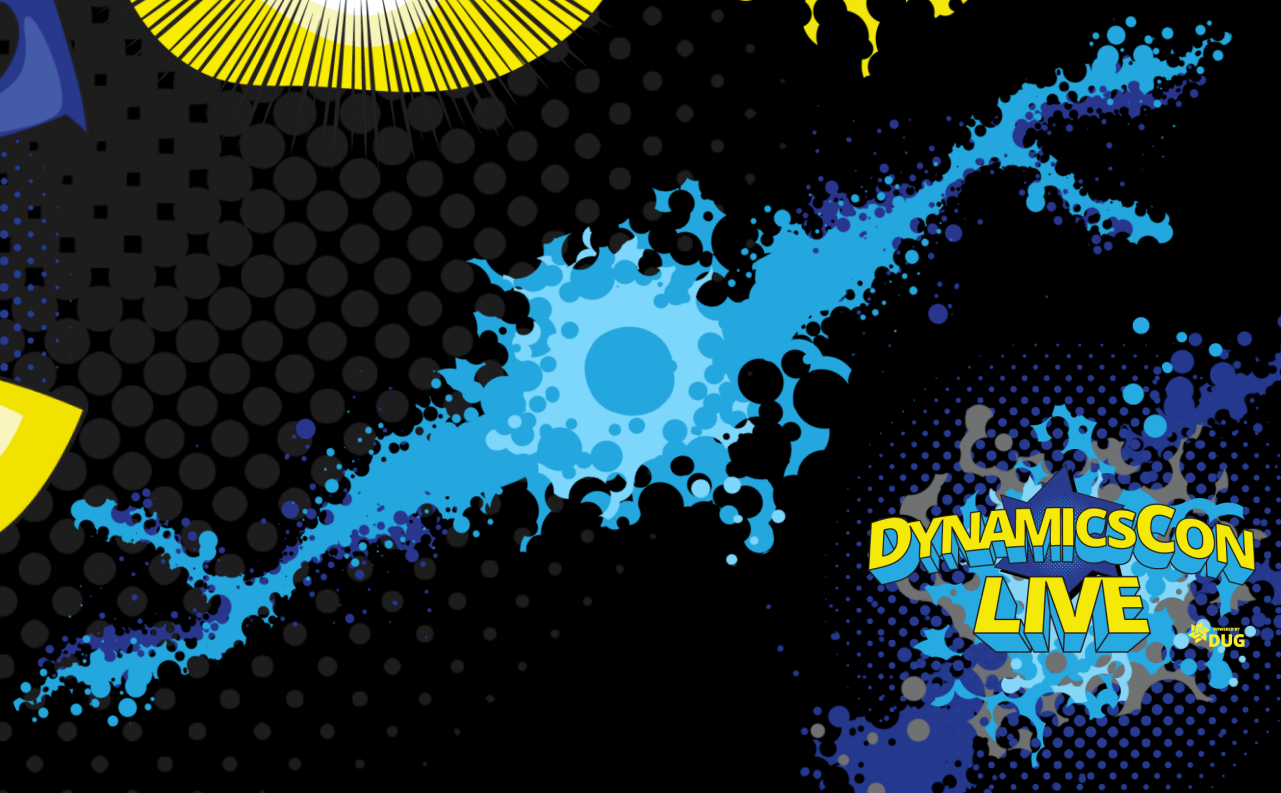
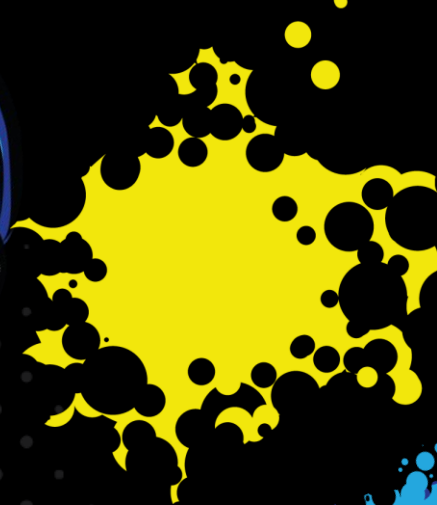
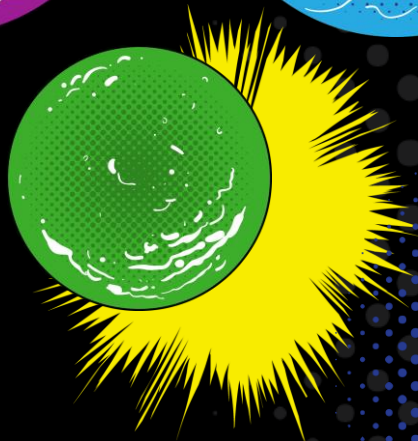
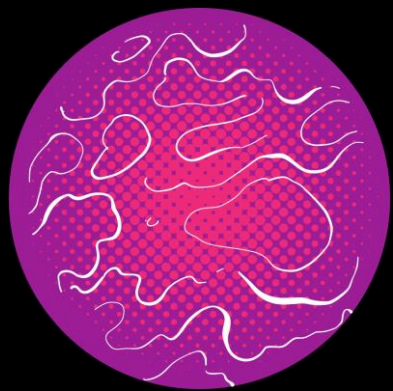
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Q&A

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