

# BUZ to Power BI



Power BI

# Power BI

Power Bi is a powerful suite of business analytical tools for data visualisation. Giving you the ability to monitor your business through interactive visual reporting.

This can be used by downloading the program for windows

<https://powerbi.microsoft.com/en-us/downloads/>

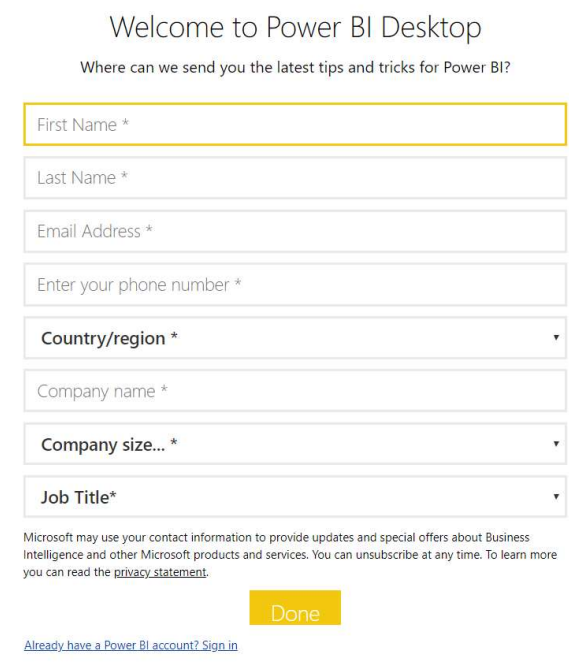
Mac users can use Power Bi via an online dashboard. This dashboard must be created by a windows user first.

Refer to

<https://buzsoftware.atlassian.net/wiki/spaces/HELP/pages/52658194/Power+BI+Reporting>

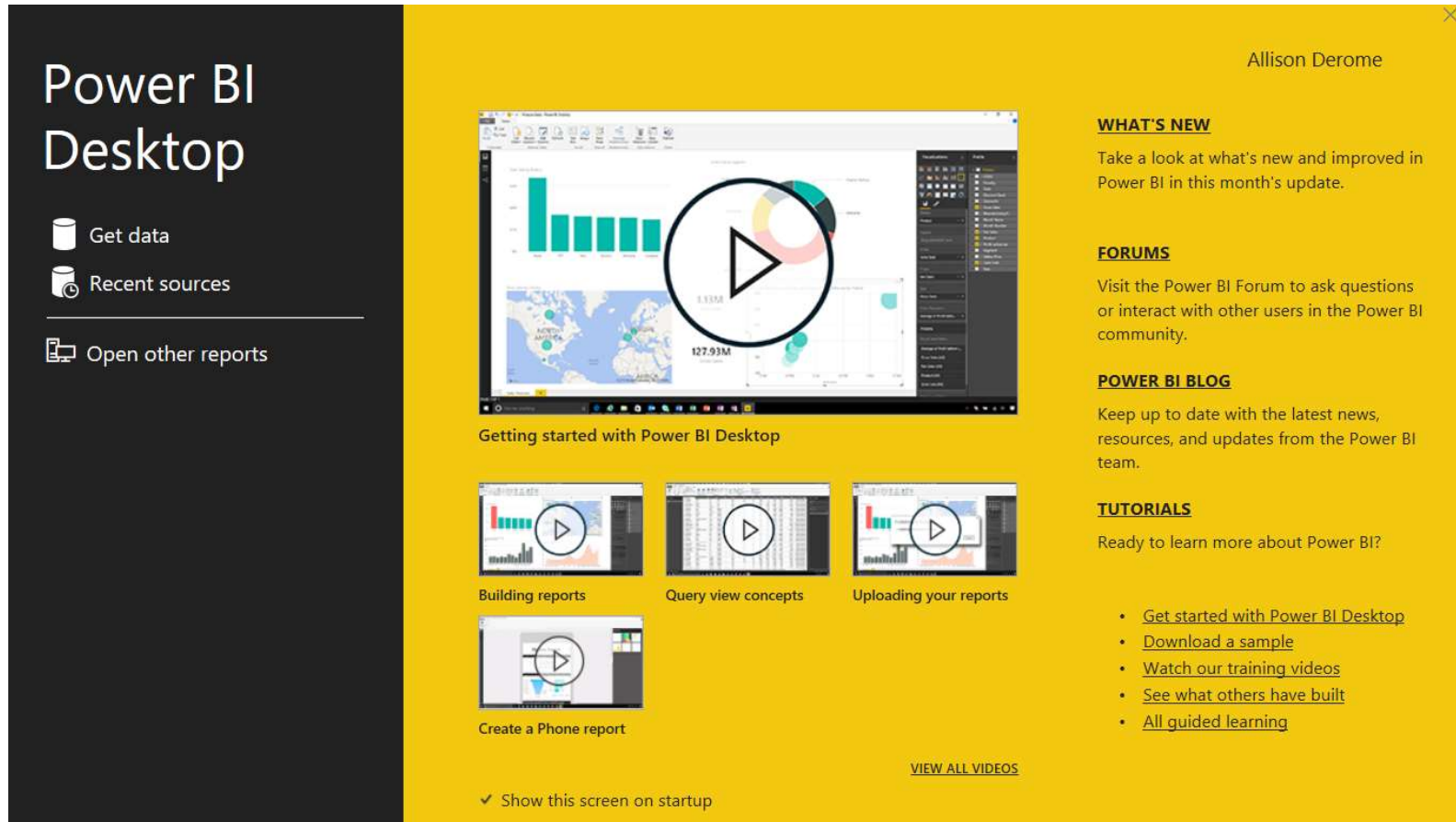
for further set up details.

The first time you run  
Power Bi create a sign in.  
Or sign in if you already  
have set up

A screenshot of the Power BI Desktop sign-in form. The form is titled "Welcome to Power BI Desktop" and includes a sub-header "Where can we send you the latest tips and tricks for Power BI?". The form contains several input fields: "First Name \*", "Last Name \*", "Email Address \*", "Enter your phone number \*", "Country/region \*", "Company name \*", "Company size... \*", and "Job Title\*". Below the form, there is a small disclaimer: "Microsoft may use your contact information to provide updates and special offers about Business Intelligence and other Microsoft products and services. You can unsubscribe at any time. To learn more you can read the [privacy statement](#)." At the bottom right of the form, there is a yellow "Done" button and a link: "Already have a Power BI account? Sign in".

# Power BI

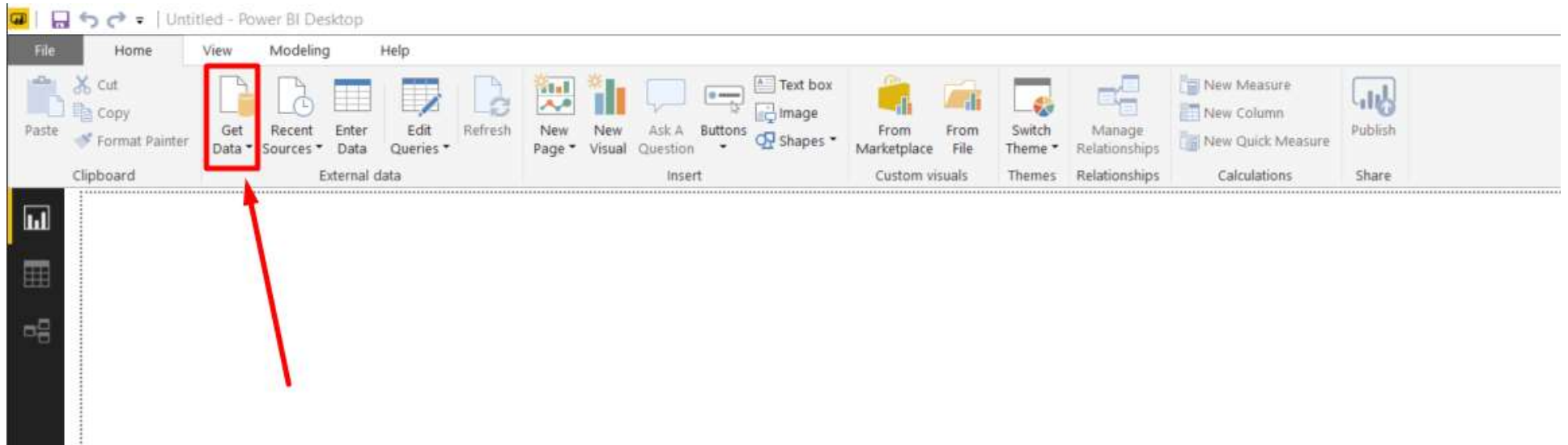
When you run Power BI Desktop, a *Welcome* screen is displayed.  
Go to -> Get Data



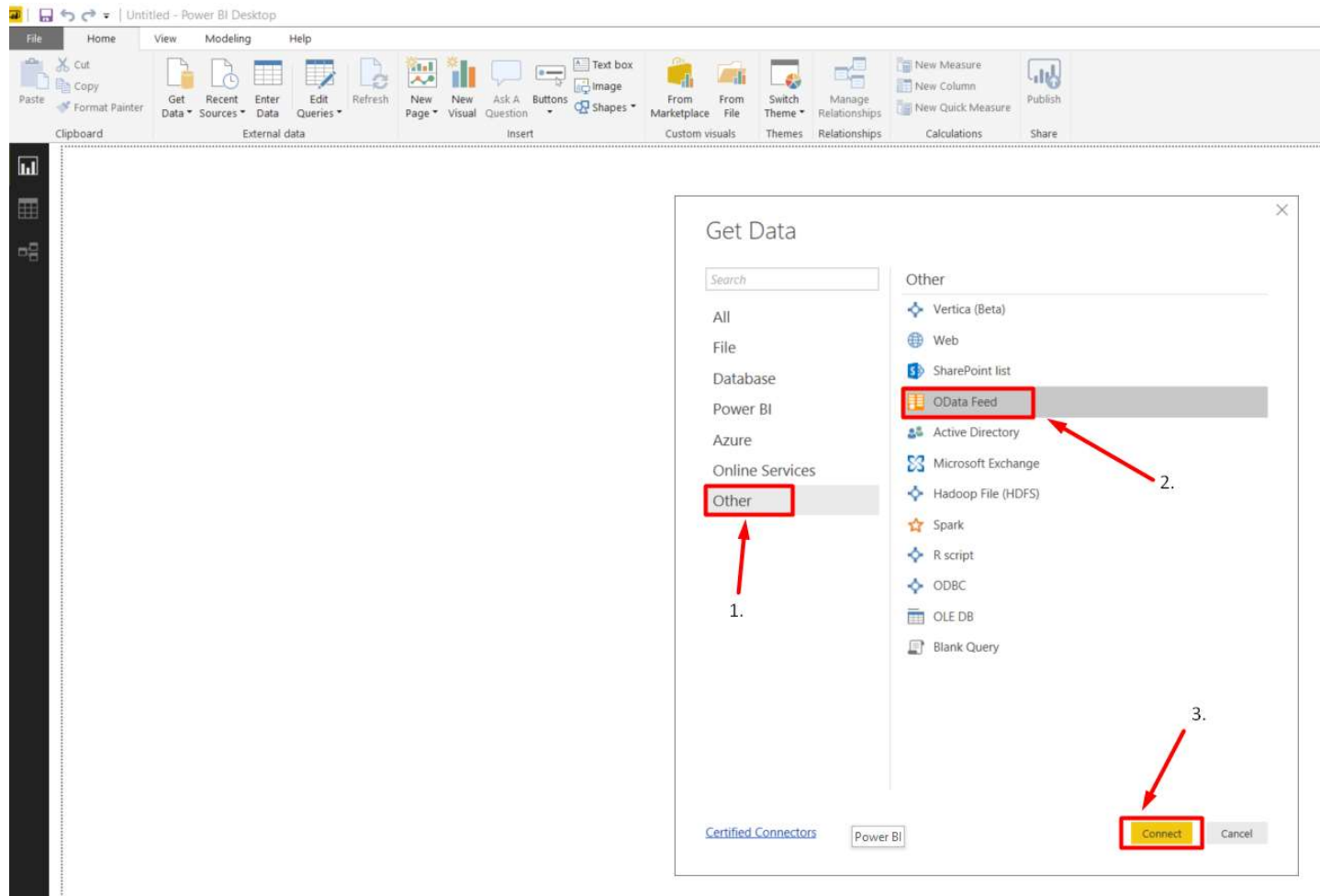
**NOTE!** Before you can start using Power BI you need your Organizational Code this can be found in BUZ under Reports -> Right hand side ( 5 Character code) or contact BUZ Support to help supply your Organizational Code.

# Power BI

Step 1. Open the required data source -> go to -> Get Data



# Power BI



Step 2 : Open the OData Feed-> Select Other -> OData Feed -> Connect

## Power BI



OData feed

Basic Advanced

URL  
https://reports.api.buzsoftware.com.au

OK Cancel

Step 3: Enter the following URL to connect to the database  
<https://reports.api.buzsoftware.com.au>

Step 4:  
Enter your  
credential's



OData feed

https://reports.api.buzsoftware.com.au/

User name  
BUZDM/allison@buzsoftware.com.au

Password  
.....

User name = BUZ company code/buz login username  
Password = BUZ user password

Back Connect Cancel

## Power BI

Navigator

Display Options ▾

https://reports.api.buzsoftware.com.au [2]

- LeadsReport
- SalesReport

1. Select SalesReport

SalesReport

OrderID	LeadsID	Customer
7f55b501-1c15-4876-bb4b-000162767027	a702f4e2-1c70-434d-a6a8-39f0845c652b	SUTHERLA
4c18b445-159c-40e3-b96c-00020b0d36d1	386481c8-2fdb-4b35-ad25-8ec88aaaa905	ALTON, LE
f2d956e6-6e01-4f25-891f-0002abbdee8a		null Smith, Rai
f3d7674e-9eb2-4a05-8dcd-000314b8f390	ff2b8fbf-1912-4a5a-b45b-9f2b90033f11	N.F. CORE
aeb774f5-3e7f-496a-98b5-0003ab548e4c	02e5b746-fe03-48f4-b93e-887098a478c6	BAKER, JC
84f6845e-d5e4-4251-b509-00040407232e	d85d9efd-de4c-4c09-9139-ff32b671e978	COLLINS F
501b5775-5ffc-4689-bdc9-0006b6e9c206	300f4b3c-a371-4739-8fa1-8c408c20e2c7	STRATI, JC
1878cb01-d6f2-4f68-929c-0007a949d1f7	e6fe03a7-aa8c-4dd2-a85a-f39d44a3b0bb	MAYKURY
f4e343d8-58c5-40a3-8fc3-000814db98e0	7b369440-b114-4f26-acc7-d30e7fc4554d	GOMEZ, C
b5d35155-9a4f-43f5-9f9a-000829bd5422	2b8a75c0-bcff-4f8a-a193-2c4a766d9124	ATKINSON
13f76ee5-b79f-40d9-81d1-0008c946cacb	23b64fd6-8117-4625-a104-ab74d02826aa	ROBBINS,
4cf095a6-a9e8-4b19-991c-00092ee1cc5f	10d6f288-25ab-46d5-84ee-b503e8514112	WISE REA
18ce1144-9130-4d2a-a959-000b06fe9a0c	f4e089fa-656e-4fab-a4cf-73ea4b84ca82	Bransden,
f0d691e4-10d4-49fc-9af6-000b4e82a622	61dd3dd6-2390-4b5d-b84d-58dccf89c4ac	BOWMAN
b32a9b3f-76d8-4554-bbc3-000c9e3bf7d7	4b6d9b45-8712-4b5f-b3ba-9187770cfe31	WINDLE, I
5deabf7c-763e-48f3-ba80-000cb7d75c2b		null C & R DAF
154643bb-764b-4e75-99e7-000cc3e1001c	8f3571ac-39ae-4c1f-86f3-73dac4d3604f	BAILEY, M

ⓘ The data in the preview has been truncated due to size limits.

2. Select Edit button

Select Related Tables

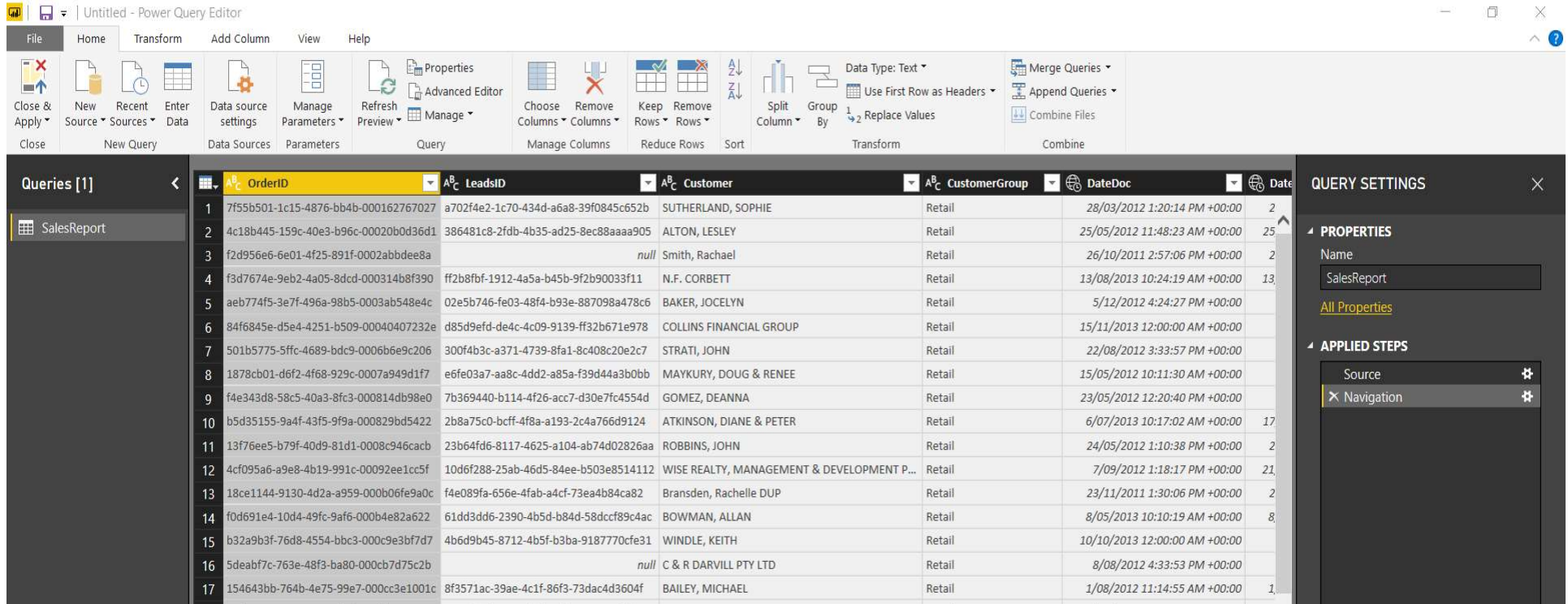
Load  Edit Cancel

Note: Do not use the LOAD button, this will load all your data which is not required to set up query tables

Step 5: Mark SalesReport  
->Select the edit button ->  
The required query data  
will load.

# Power BI

The data query editor table will open, here you can select and filter what data to show in the Power BI report. Columns can be selected or deleted.



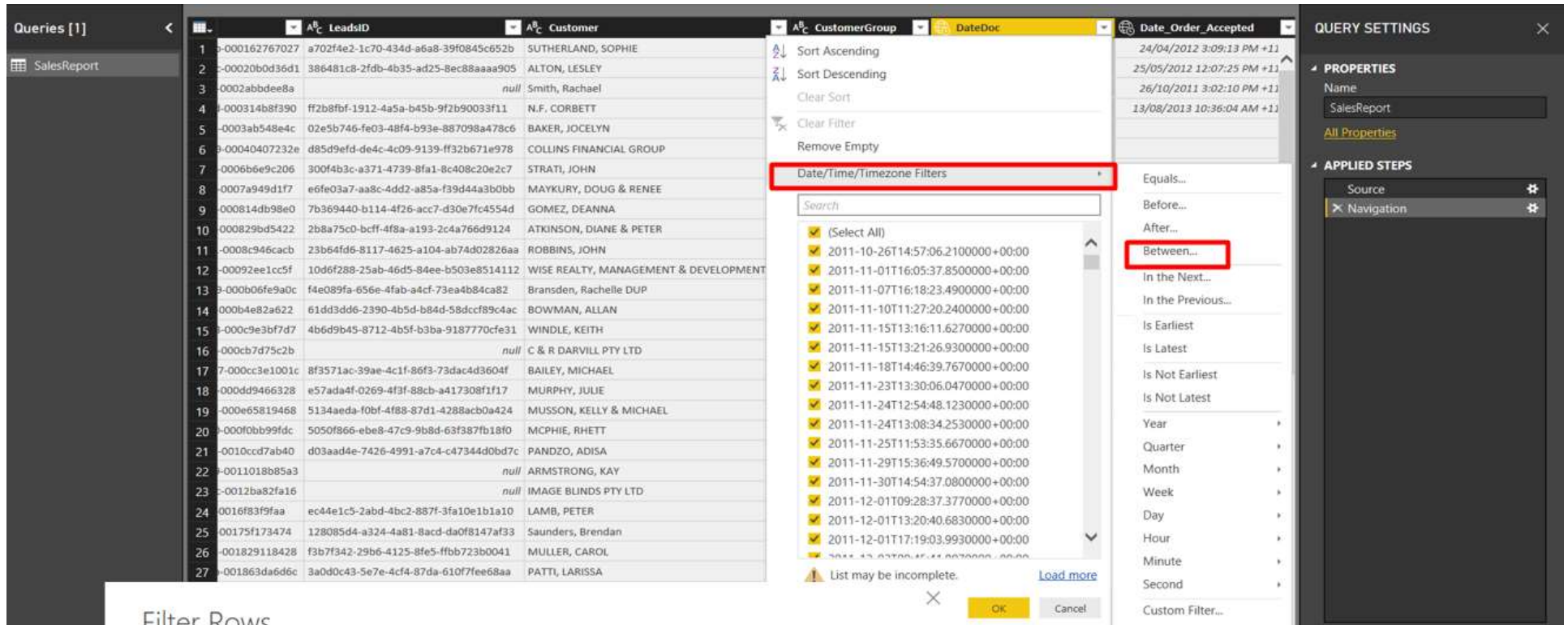
The screenshot displays the Power Query Editor window titled "Untitled - Power Query Editor". The ribbon includes tabs for File, Home, Transform, Add Column, View, and Help. The Transform tab is active, showing options like Merge Queries, Append Queries, and Combine Files. Below the ribbon is a data table with the following columns: OrderID, LeadsID, Customer, CustomerGroup, DateDoc, and Date. The table contains 17 rows of data. On the right side, the "QUERY SETTINGS" pane is open, showing the "PROPERTIES" section with the name "SalesReport" and the "APPLIED STEPS" section with "Source" and "Navigation" steps.

	OrderID	LeadsID	Customer	CustomerGroup	DateDoc	Date
1	7f55b501-1c15-4876-bb4b-000162767027	a702f4e2-1c70-434d-a6a8-39f0845c652b	SUTHERLAND, SOPHIE	Retail	28/03/2012 1:20:14 PM +00:00	2
2	4c18b445-159c-40e3-b96c-00020b0d36d1	386481c8-2fdb-4b35-ad25-8ec88aaaa905	ALTON, LESLEY	Retail	25/05/2012 11:48:23 AM +00:00	25
3	f2d956e6-6e01-4f25-891f-0002abbdee8a		Smith, Rachael	Retail	26/10/2011 2:57:06 PM +00:00	2
4	f3d7674e-9eb2-4a05-8dcd-000314b8f390	ff2b8fbf-1912-4a5a-b45b-9f2b90033f11	N.F. CORBETT	Retail	13/08/2013 10:24:19 AM +00:00	13
5	aeb774f5-3e7f-496a-98b5-0003ab548e4c	02e5b746-fe03-48f4-b93e-887098a478c6	BAKER, JOCELYN	Retail	5/12/2012 4:24:27 PM +00:00	
6	84f6845e-d5e4-4251-b509-00040407232e	d85d9efd-de4c-4c09-9139-ff32b671e978	COLLINS FINANCIAL GROUP	Retail	15/11/2013 12:00:00 AM +00:00	
7	501b5775-5ffc-4689-bdc9-0006b6e9c206	300f4b3c-a371-4739-8fa1-8c408c20e2c7	STRATI, JOHN	Retail	22/08/2012 3:33:57 PM +00:00	
8	1878cb01-d6f2-4f68-929c-0007a949d1f7	e6fe03a7-aa8c-4dd2-a85a-f39d44a3b0bb	MAYKURY, DOUG & RENEE	Retail	15/05/2012 10:11:30 AM +00:00	
9	f4e343d8-58c5-40a3-8fc3-000814db98e0	7b369440-b114-4f26-acc7-d30e7fc4554d	GOMEZ, DEANNA	Retail	23/05/2012 12:20:40 PM +00:00	
10	b5d35155-9a4f-43f5-9f9a-000829bd5422	2b8a75c0-bcff-4f8a-a193-2c4a766d9124	ATKINSON, DIANE & PETER	Retail	6/07/2013 10:17:02 AM +00:00	17
11	13f76ee5-b79f-40d9-81d1-0008c946cacb	23b64fd6-8117-4625-a104-ab74d02826aa	ROBBINS, JOHN	Retail	24/05/2012 1:10:38 PM +00:00	2
12	4cf095a6-a9e8-4b19-991c-00092ee1cc5f	10d6f288-25ab-46d5-84ee-b503e8514112	WISE REALTY, MANAGEMENT & DEVELOPMENT P...	Retail	7/09/2012 1:18:17 PM +00:00	21
13	18ce1144-9130-4d2a-a959-000b06fe9a0c	f4e089fa-656e-4fab-a4cf-73ea4b84ca82	Brandsen, Rachele DUP	Retail	23/11/2011 1:30:06 PM +00:00	2
14	f0d691e4-10d4-49fc-9af6-000b4e82a622	61d3dd6-2390-4b5d-b84d-58dccb89c4ac	BOWMAN, ALLAN	Retail	8/05/2013 10:10:19 AM +00:00	8
15	b32a9b3f-76d8-4554-bbc3-000c9e3bf7d7	4b6d9b45-8712-4b5f-b3ba-9187770cfe31	WINDLE, KEITH	Retail	10/10/2013 12:00:00 AM +00:00	
16	5deabf7c-763e-48f3-ba80-000cb7d75c2b		C & R DARVILL PTY LTD	Retail	8/08/2012 4:33:53 PM +00:00	
17	154643bb-764b-4e75-99e7-000cc3e1001c	8f3571ac-39ae-4c1f-86f3-73dac4d3604f	BAILEY, MICHAEL	Retail	1/08/2012 11:14:55 AM +00:00	1



# Power BI

## Example of Filtering Date/Time combination



The screenshot displays the Power BI interface with a data table, a 'Date/Time/Timezone Filters' dialog box, and a 'Filter Rows' dialog box.

LeadID	Customer	CustomerGroup	DateDoc	Date_Order_Accepted
1-000162767027	SUTHERLAND, SOPHIE			24/04/2012 3:09:13 PM +11
2-00020b0d36d1	ALTON, LESLEY			25/05/2012 12:07:25 PM +11
3-0002abbdee8a	Smith, Rachael			26/10/2011 3:02:10 PM +11
4-000314b8f390	N.F. CORBETT			13/08/2013 10:36:04 AM +11
5-0003ab548e4c	BAKER, JOCELYN			
6-00040407232e	COLLINS FINANCIAL GROUP			
7-0006b6e9c206	STRATI, JOHN			
8-0007a949d1f7	MAYKURY, DOUG & RENEE			
9-000814db98e0	GOMEZ, DEANNA			
10-000829bd5422	ATKINSON, DIANE & PETER			
11-0008c946cab	ROBBINS, JOHN			
12-00092ee1cc5f	WISE REALTY, MANAGEMENT & DEVELOPMENT			
13-000b06fe9a0c	Bransden, Rachelle DUP			
14-000b4e82a622	BOWMAN, ALLAN			
15-000c9e3bf7d7	WINDLE, KEITH			
16-000cb7d75c2b	C & R DARVILL PTY LTD			
17-000cc3e1001c	BAILEY, MICHAEL			
18-000dd9466328	MURPHY, JULIE			
19-000e65819468	MUSSON, KELLY & MICHAEL			
20-000f0bb99fdc	MCPHIE, RHETT			
21-0010ccd7ab40	PANDZO, ADISA			
22-0011018b85a3	ARMSTRONG, KAY			
23-0012ba82fa16	IMAGE BLUNDS PTY LTD			
24-0016f83f9faa	LAMB, PETER			
25-00175f173474	Saunders, Brendan			
26-001829118428	MULLER, CAROL			
27-001863da6d6c	PATTI, LARISSA			

The 'Date/Time/Timezone Filters' dialog box shows a list of dates with checkboxes. The 'Between...' option is selected in the filter type dropdown.

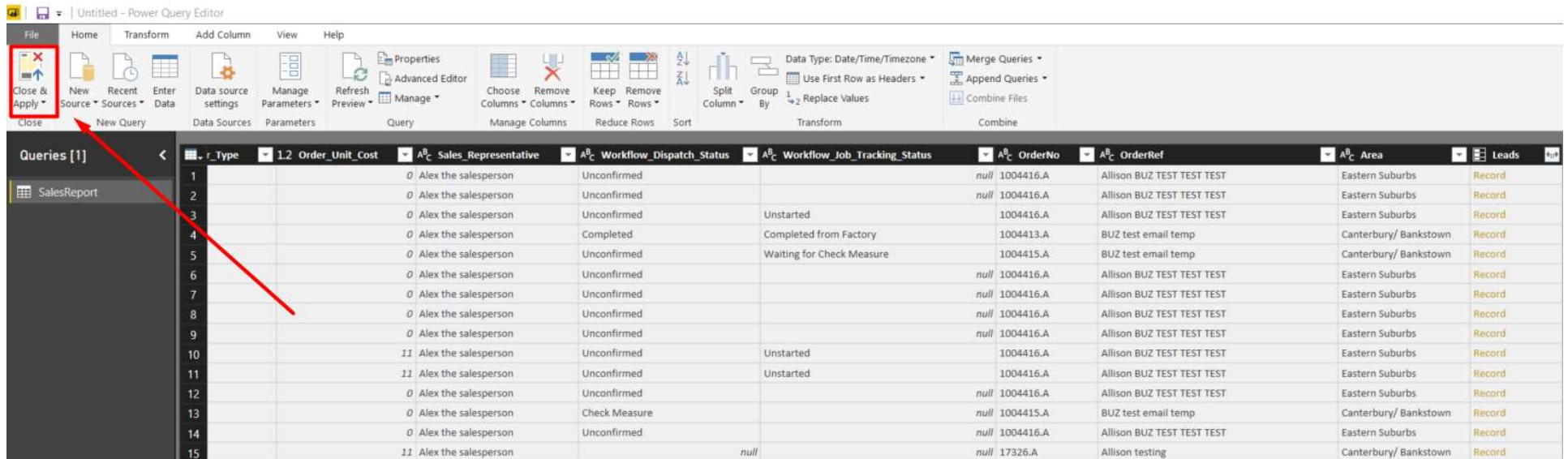
The 'Filter Rows' dialog box shows the following configuration:

- Basic filter selected
- Keep rows where 'DateDoc'
- is after 1/08/2018
- And
- is before 8/08/2018

OK Cancel

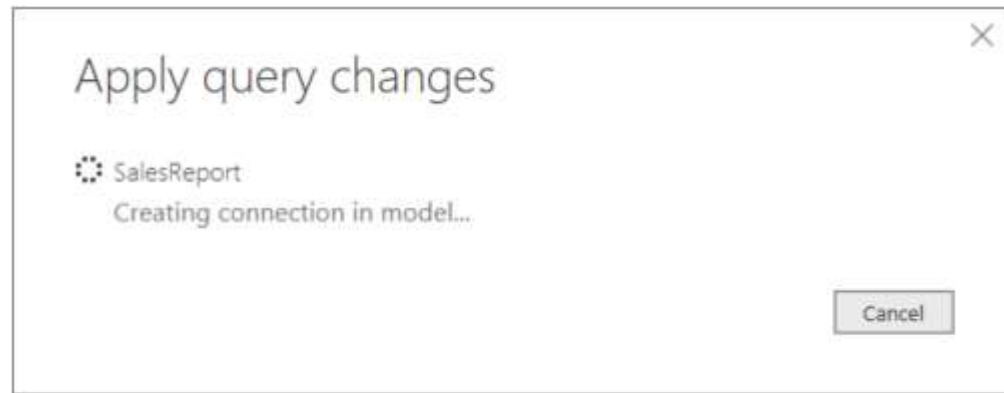
# Power BI

Once you are happy with the selected query editor data -> Close & Apply

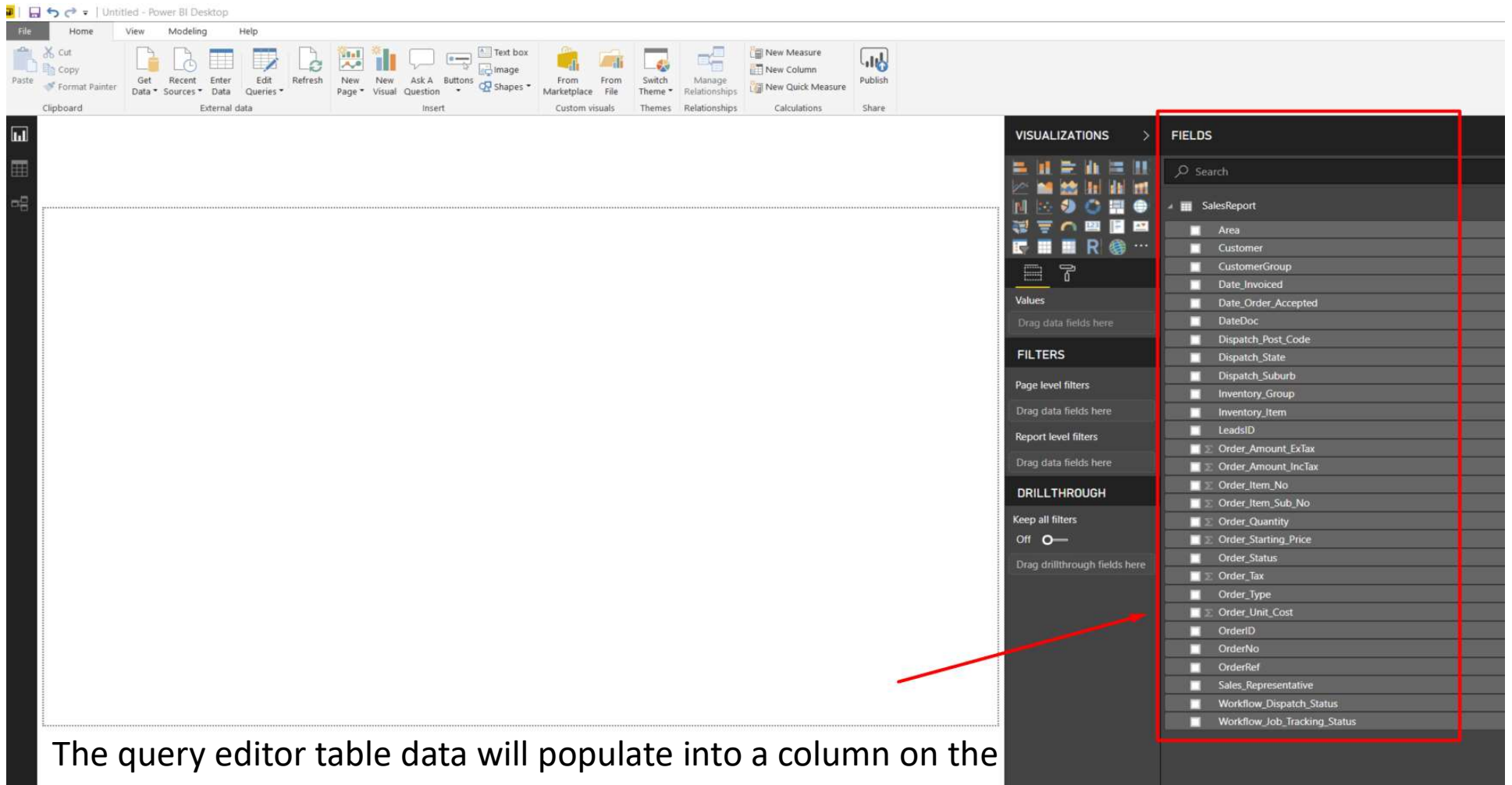


	r_Type	1.2 Order_Unit_Cost	A <sup>B</sup> <sub>C</sub> Sales_Representative	A <sup>B</sup> <sub>C</sub> Workflow_Dispatch_Status	A <sup>B</sup> <sub>C</sub> Workflow_Job_Tracking_Status	A <sup>B</sup> <sub>C</sub> OrderNo	A <sup>B</sup> <sub>C</sub> OrderRef	A <sup>B</sup> <sub>C</sub> Area	Leads	
1			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
2			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
3			0 Alex the salesperson	Unconfirmed	Unstarted	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record	
4			0 Alex the salesperson	Completed	Completed from Factory	1004413.A	BUZ test email temp	Canterbury/ Bankstown	Record	
5			0 Alex the salesperson	Unconfirmed	Waiting for Check Measure	1004415.A	BUZ test email temp	Canterbury/ Bankstown	Record	
6			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
7			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
8			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
9			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
10			11 Alex the salesperson	Unconfirmed	Unstarted	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record	
11			11 Alex the salesperson	Unconfirmed	Unstarted	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record	
12			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
13			0 Alex the salesperson	Check Measure		null	1004415.A	BUZ test email temp	Canterbury/ Bankstown	Record
14			0 Alex the salesperson	Unconfirmed		null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
15			11 Alex the salesperson		null	null	17326.A	Allison testing	Canterbury/ Bankstown	Record

The following screen may appear when loading the data



# Power BI

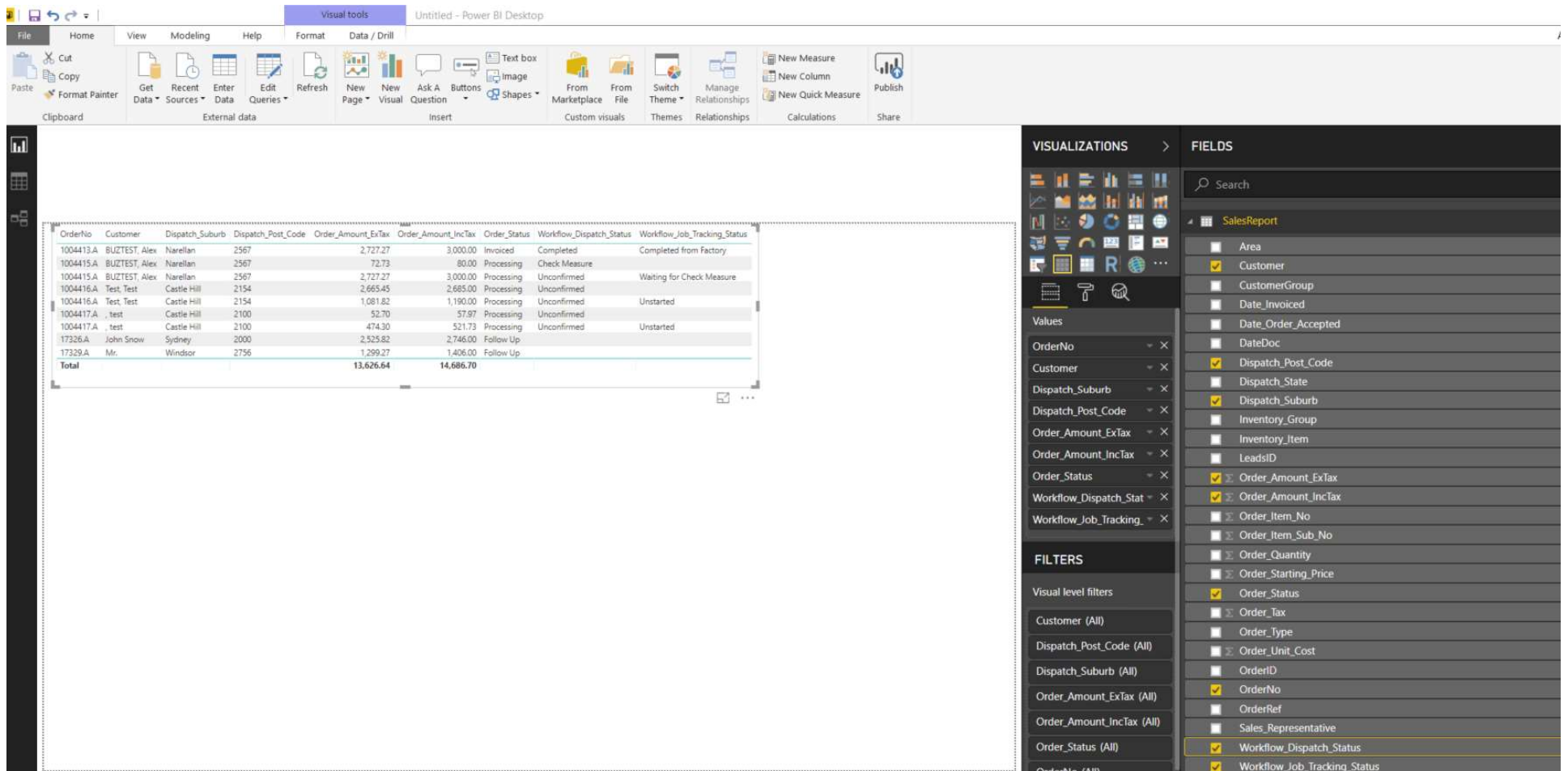


The query editor table data will populate into a column on the right called Fields.

Select what column data you would like to appear in the report.

# Power BI

The following Power BI report was created by selecting/dragging the following fields :  
 OrderNo -> Customer -> Dispatch\_Suburb -> Dispatch\_Post\_Code -> Order\_Amount\_ExTax  
 -> Order\_Amount\_IncTax -> Workflow\_Dispatch\_Status ->Workflow\_Job\_Tracking\_Status  
 ->Order\_status



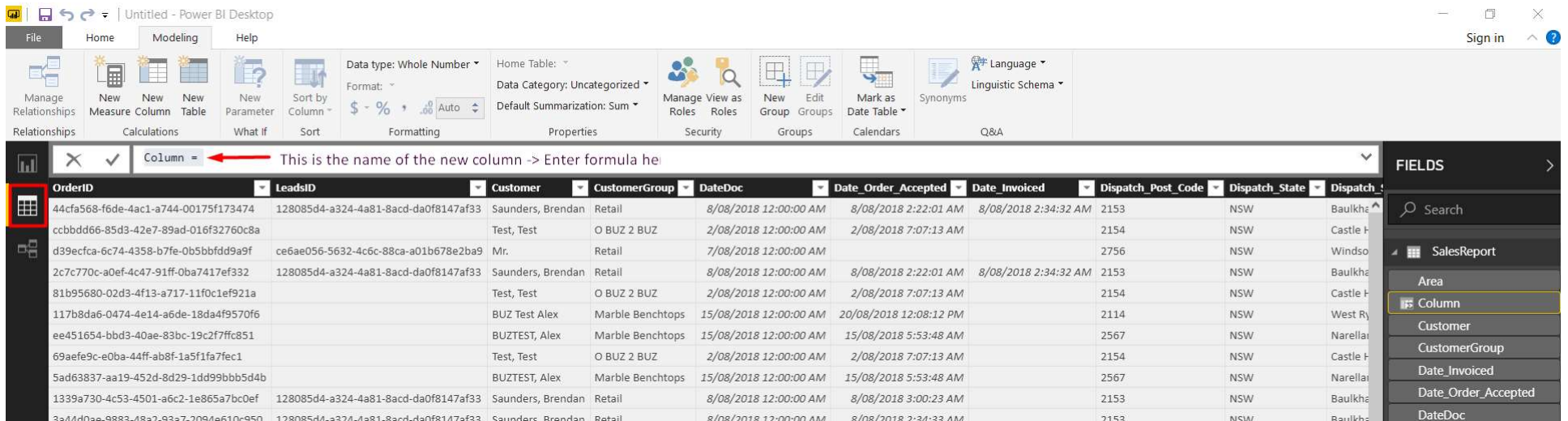
The screenshot shows the Power BI Desktop interface with a data table and the Fields pane. The data table contains the following information:

OrderNo	Customer	Dispatch_Suburb	Dispatch_Post_Code	Order_Amount_ExTax	Order_Amount_IncTax	Order_Status	Workflow_Dispatch_Status	Workflow_Job_Tracking_Status
1004413.A	BUZTEST, Alex	Narellan	2567	2,727.27	3,000.00	Invoiced	Completed	Completed from Factory
1004415.A	BUZTEST, Alex	Narellan	2567	72.73	80.00	Processing	Check Measure	
1004415.A	BUZTEST, Alex	Narellan	2567	2,727.27	3,000.00	Processing	Unconfirmed	Waiting for Check Measure
1004416.A	Test, Test	Castle Hill	2154	2,665.45	2,665.00	Processing	Unconfirmed	
1004416.A	Test, Test	Castle Hill	2154	1,081.82	1,190.00	Processing	Unconfirmed	Unstarted
1004417.A	, test	Castle Hill	2100	52.70	57.97	Processing	Unconfirmed	
1004417.A	, test	Castle Hill	2100	474.30	521.73	Processing	Unconfirmed	Unstarted
17326.A	John Snow	Sydney	2000	2,525.82	2,746.00	Follow Up		
17329.A	Mr.	Windsor	2756	1,299.27	1,406.00	Follow Up		
<b>Total</b>				<b>13,626.64</b>	<b>14,686.70</b>			

The Fields pane on the right shows the following fields selected for the report:

- Customer
- Dispatch\_Post\_Code
- Dispatch\_Suburb
- Order\_Amount\_ExTax
- Order\_Amount\_IncTax
- Order\_Status
- Workflow\_Dispatch\_Status
- Workflow\_Job\_Tracking\_Status

# Power BI



The screenshot shows the Power BI Desktop interface. The top ribbon is set to 'Modeling'. The 'New Column' button is highlighted. Below the ribbon, a data table is displayed with columns: OrderID, LeadsID, Customer, CustomerGroup, DateDoc, Date\_Order\_Accepted, Date\_Invoiced, Dispatch\_Post\_Code, Dispatch\_State, and Dispatch\_Location. A new column is being added, and the text 'This is the name of the new column -> Enter formula here' is visible in the column header area. The 'FIELDS' pane on the right shows the 'SalesReport' area with a 'Column' button highlighted.

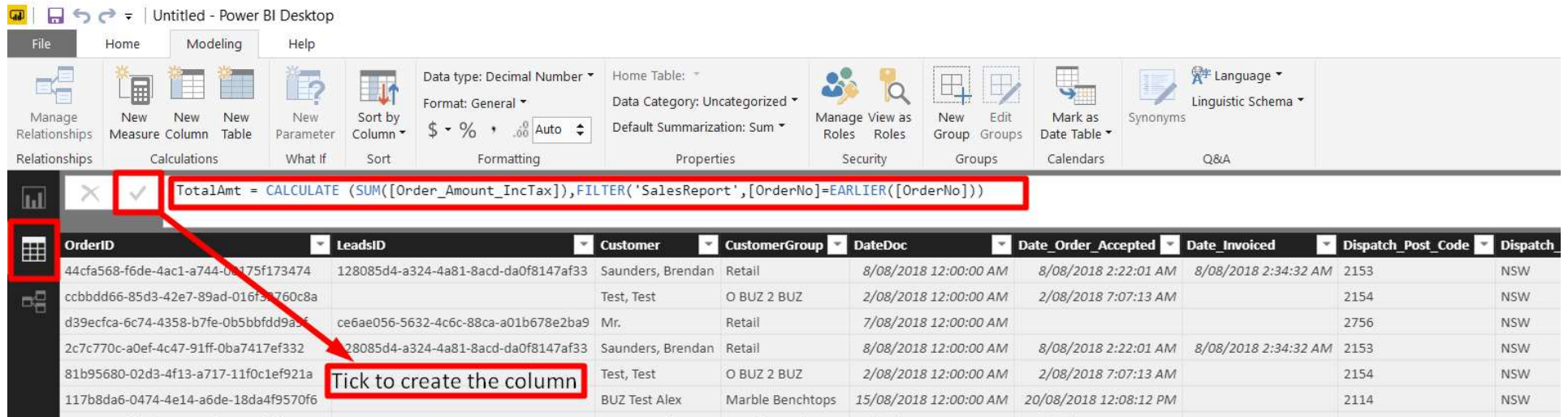
OrderID	LeadsID	Customer	CustomerGroup	DateDoc	Date_Order_Accepted	Date_Invoiced	Dispatch_Post_Code	Dispatch_State	Dispatch_Location
44cfa568-f6de-4ac1-a744-00175f173474	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:22:01 AM	8/08/2018 2:34:32 AM	2153	NSW	Baulkham Hills
ccbdbdd66-85d3-42e7-89ad-016f32760c8a		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW	Castle Hill
d39ecfca-6c74-4358-b7fe-0b5bbfdd9a9f	ce6ae056-5632-4c6c-88ca-a01b678e2ba9	Mr.	Retail	7/08/2018 12:00:00 AM			2756	NSW	Windso
2c7c770c-a0ef-4c47-91ff-0ba7417ef332	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:22:01 AM	8/08/2018 2:34:32 AM	2153	NSW	Baulkham Hills
81b95680-02d3-4f13-a717-11f0c1ef921a		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW	Castle Hill
117b8da6-0474-4e14-a6de-18da4f9570f6		BUZ Test Alex	Marble Benchtops	15/08/2018 12:00:00 AM	20/08/2018 12:08:12 PM		2114	NSW	West Ry
ee451654-bbd3-40ae-83bc-19c2f7fc851		BUZTEST, Alex	Marble Benchtops	15/08/2018 12:00:00 AM	15/08/2018 5:53:48 AM		2567	NSW	Narellan
69aefe9c-e0ba-44ff-ab8f-1a5f1fa7fec1		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW	Castle Hill
5ad63837-aa19-452d-8d29-1dd99bbb5d4b		BUZTEST, Alex	Marble Benchtops	15/08/2018 12:00:00 AM	15/08/2018 5:53:48 AM		2567	NSW	Narellan
1339a730-4c53-4501-a6c2-1e865a7bc0ef	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 3:00:23 AM		2153	NSW	Baulkham Hills
3ad4d0ae-9883-48a7-93a7-2094e610c950	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:34:32 AM		2153	NSW	Baulkham Hills

For more specific reporting extra columns can be added to combine existing column data with formulas -> Modeling ->New Column -> Enter the parameters/formulas required.

Further Help can be found at

<https://docs.microsoft.com/en-us/power-bi/desktop-quickstart-learn-dax-basics>

# Power BI



Formula Bar: `TotalAmt = CALCULATE (SUM([Order_Amount_IncTax]), FILTER('SalesReport', [OrderNo]=EARLIER([OrderNo])))`

OrderID	LeadsID	Customer	CustomerGroup	DateDoc	Date_Order_Accepted	Date_Invoiced	Dispatch_Post_Code	Dispatch
44cfa568-f6de-4ac1-a744-0e175f173474	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:22:01 AM	8/08/2018 2:34:32 AM	2153	NSW
ccbddd66-85d3-42e7-89ad-016f5c760c8a		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW
d39ecfca-6c74-4358-b7fe-0b5bbfdd9a3f	ce6ae056-5632-4c6c-88ca-a01b678e2ba9	Mr.	Retail	7/08/2018 12:00:00 AM			2756	NSW
2c7c770c-a0ef-4c47-91ff-0ba7417ef332	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:22:01 AM	8/08/2018 2:34:32 AM	2153	NSW
81b95680-02d3-4f13-a717-11f0c1ef921a		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW
117b8da6-0474-4e14-a6de-18da4f9570f6		BUZ Test Alex	Marble Benchtops	15/08/2018 12:00:00 AM	20/08/2018 12:08:12 PM		2114	NSW

The meaning of the formula:

`TotalAmt = CALCULATE(SUM([Order_Amount_IncTax]), FILTER('SalesReport', [OrderNo]=EARLIER([OrderNo])))`

TotalAMT = new column name

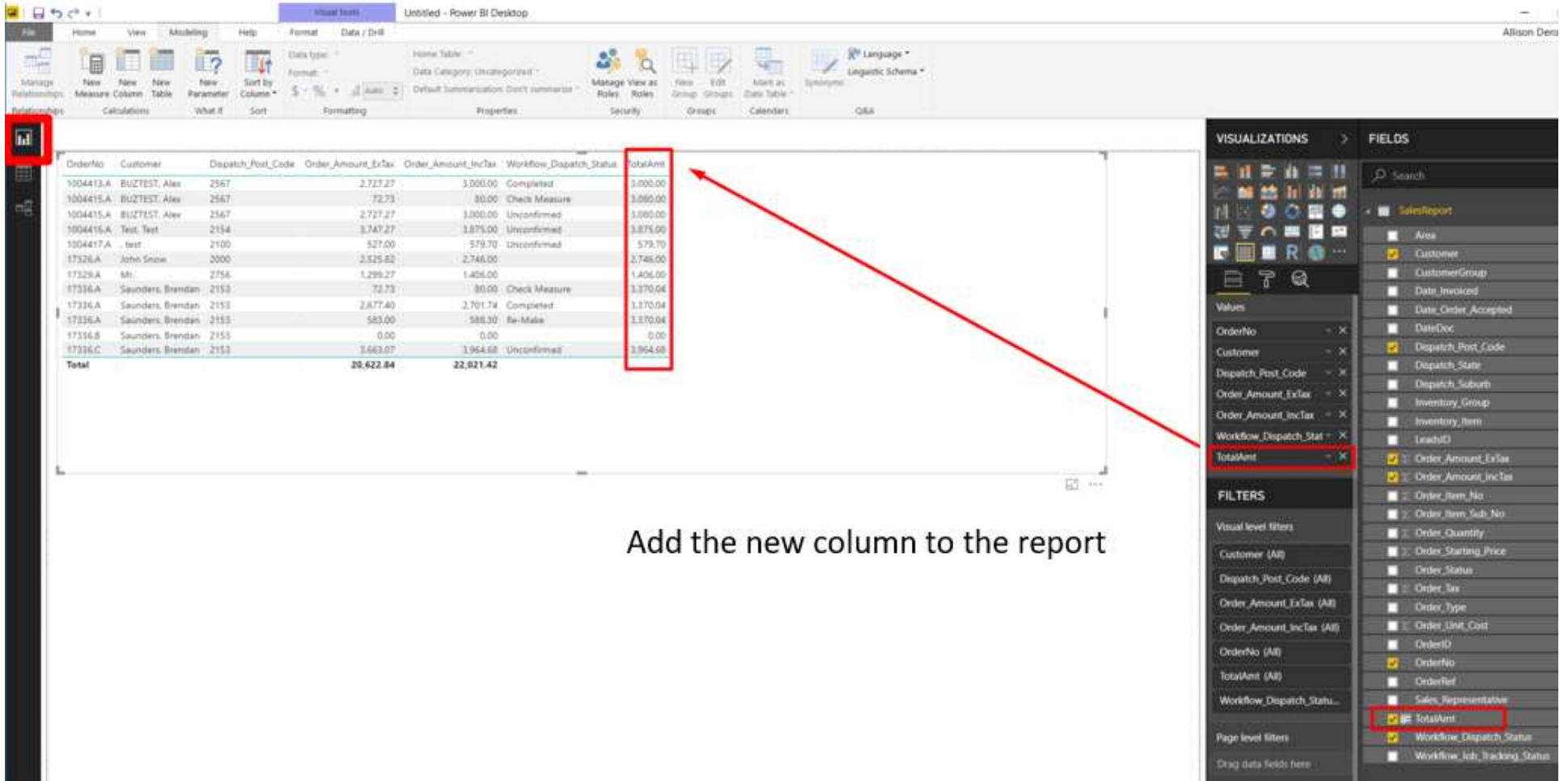
CALCULATE = define a column's values, anything from putting together text values from a couple of different columns to calculating a numeric value from other values

SUM([Order\_Amount\_IncTax])= a sum of the numeric data from the Order\_Amount\_IncTax column

FILTER('SalesReport', [OrderNo]=EARLIER([OrderNo])) = used to refer to the table and order no data you want to filter, (SalesReport table),

EARLIER which already has the same order number.

# Power BI



Unbilled - Power BI Desktop

OrderNo	Customer	Dispatch_Post_Code	Order_Amount_ExTax	Order_Amount_IncTax	Workflow_Dispatch_Status	TotalAmt
1004413.A	BUZTEST, Alex	2567	2,727.27	3,000.00	Completed	3,000.00
1004415.A	BUZTEST, Alex	2567	72.73	80.00	Check Measure	3,080.00
1004415.A	BUZTEST, Alex	2567	2,727.27	3,000.00	Unconfirmed	3,080.00
1004416.A	Test, Test	2154	3,747.27	3,875.00	Unconfirmed	3,875.00
1004417.A	test	2100	527.00	579.70	Unconfirmed	579.70
17326.A	John Snow	3000	2,925.82	2,748.00		2,748.00
17329.A	Mr.	2756	1,299.27	1,406.00		1,406.00
17336.A	Saunders, Brendan	2153	72.73	80.00	Check Measure	3,170.04
17336.A	Saunders, Brendan	2153	2,677.40	2,701.74	Completed	3,170.04
17336.A	Saunders, Brendan	2153	583.00	588.30	Re-Make	3,170.04
17336.B	Saunders, Brendan	2153	0.00	0.00		0.00
17336.C	Saunders, Brendan	2153	3,663.07	3,964.68	Unconfirmed	3,964.68
<b>Total</b>			<b>20,622.84</b>	<b>22,921.42</b>		

Visualizations

Fields

Visual level filters

- Customer (All)
- Dispatch\_Post\_Code (All)
- Order\_Amount\_ExTax (All)
- Order\_Amount\_IncTax (All)
- OrderNo (All)
- TotalAmt (All)
- Workflow\_Dispatch\_Status...

Page level filters

Drag data fields here

Filters

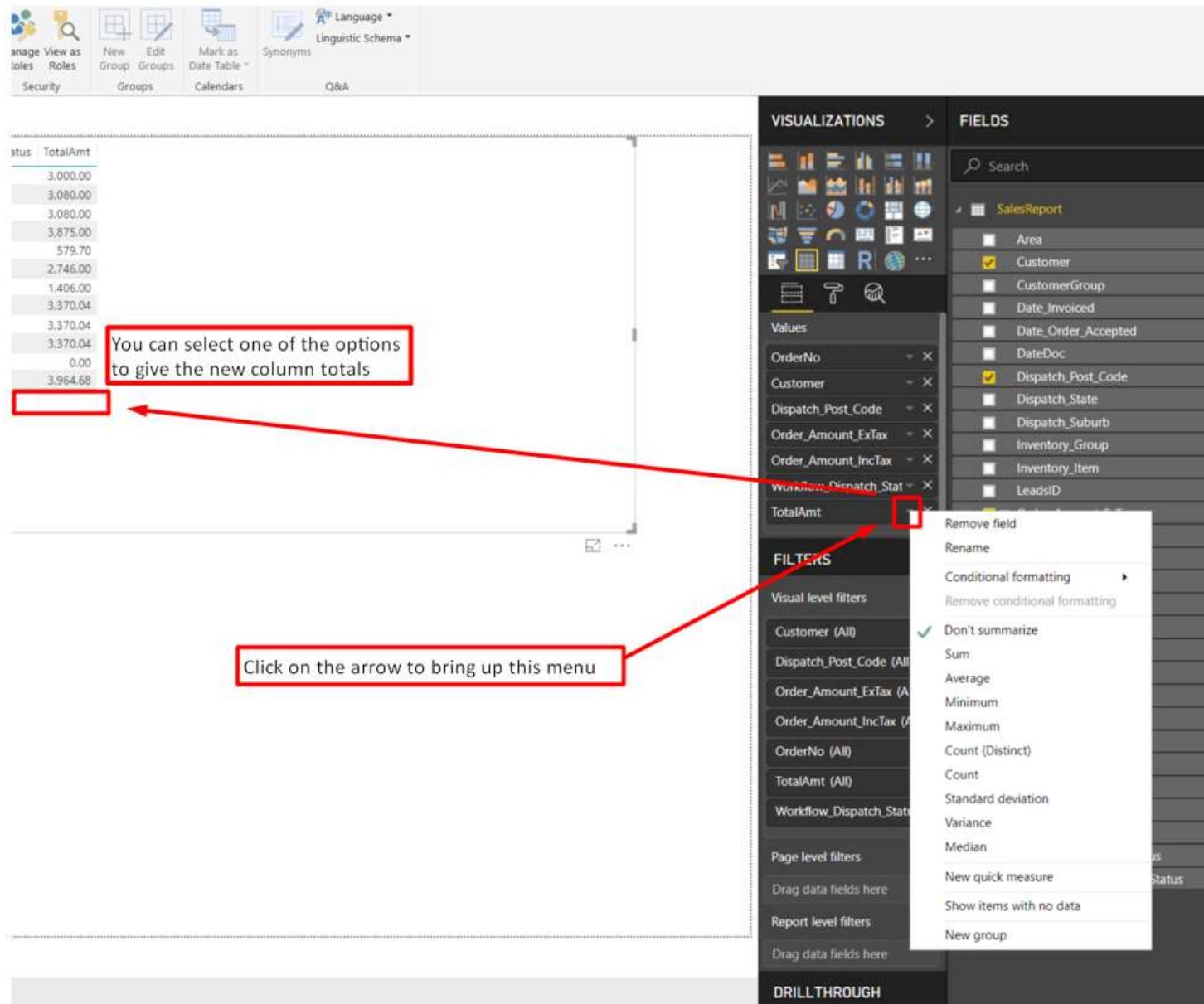
- OrderNo
- Customer
- Dispatch\_Post\_Code
- Order\_Amount\_ExTax
- Order\_Amount\_IncTax
- Workflow\_Dispatch\_Stat
- TotalAmt

Fields

- Area
- Customer
- CustomerGroup
- Date\_Involved
- Date\_Order\_Accepted
- DateDoc
- Dispatch\_Post\_Code
- Dispatch\_State
- Dispatch\_Suburb
- Inventory\_Group
- Inventory\_Item
- LeadID
- Order\_Amount\_ExTax
- Order\_Amount\_IncTax
- Order\_Item\_No
- Order\_Item\_Sub\_No
- Order\_Quantity
- Order\_Starting\_Price
- Order\_Status
- Order\_Tax
- Order\_Type
- Order\_Unit\_Cost
- OrderID
- OrderNo
- OrderRef
- Sales\_Representative
- TotalAmt
- Workflow\_Dispatch\_Status
- Workflow\_Job\_Tracking\_Status

Add the new column to the report

# Power BI



Language -  
Linguistic Schema -

Manage Roles  
New Group  
Edit Groups  
Mark as Date Table  
Synonyms  
Security  
Groups  
Calendars  
Q&A

Status	TotalAmt
	3.000.00
	3.080.00
	3.080.00
	3.875.00
	579.70
	2.746.00
	1.406.00
	3.370.04
	3.370.04
	3.370.04
	0.00
	3.964.68

You can select one of the options to give the new column totals

Click on the arrow to bring up this menu

Visualizations

Fields

Search

SalesReport

- Area
- Customer
- CustomerGroup
- Date\_Invoiced
- Date\_Order\_Accepted
- DateDoc
- Dispatch\_Post\_Code
- Dispatch\_State
- Dispatch\_Suburb
- Inventory\_Group
- Inventory\_Item
- LeadsID

Values

- OrderNo - X
- Customer - X
- Dispatch\_Post\_Code - X
- Order\_Amount\_ExTax - X
- Order\_Amount\_IncTax - X
- Workflow\_Dispatch\_State - X
- TotalAmt

Filters

Visual level filters

- Customer (All)
- Dispatch\_Post\_Code (All)
- Order\_Amount\_ExTax (A)
- Order\_Amount\_IncTax (A)
- OrderNo (All)
- TotalAmt (All)
- Workflow\_Dispatch\_State

Page level filters

Drag data fields here

Report level filters

Drag data fields here

DRILLTHROUGH

Remove field

Rename

Conditional formatting

Remove conditional formatting

Don't summarize

Sum

Average

Minimum

Maximum

Count (Distinct)

Count

Standard deviation

Variance

Median

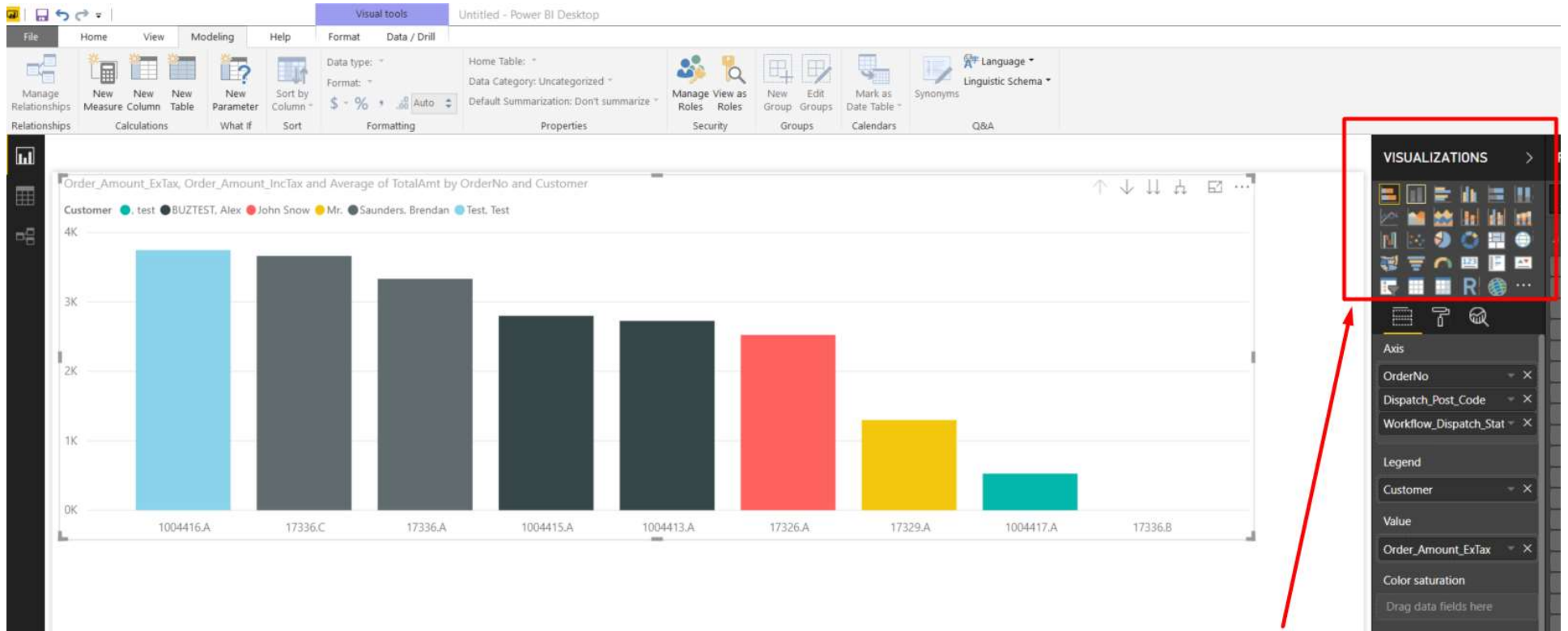
New quick measure

Show items with no data

New group



# Power BI



You can visualize the report data by selecting one of these graphs

If you cant find what your looking for in the help documentation let us know!

We will point you in the right direction or get something added to the documentation for you.

Email: [support@busoftware.com.au](mailto:support@busoftware.com.au)



A background image of a sunset or sunrise with a warm orange and yellow sky and white clouds at the bottom.

# Thank you

Any further questions please contact us at  
[support@buzsoftware.com.au](mailto:support@buzsoftware.com.au)