

Badger

Instructions



Table of contents

Introduction..... 3

Badger App 3

Badger template reports 3

Start using the Badger Power BI reports..... 3

 Select company 3

 Sign in 4

 Power BI reports in Business Central 4

Introduction

This document describes the different settings needed in order to be able to use the Badger reports.

Badger App

When the Badger App is installed a datum table is created in Dynamics 365 Business Central making it possible to filter on dates in the Power BI reports. Badger will create dates from the first G/L entry until 4 years ahead from the day you install it.

Badger template reports

Go to our website <https://www.smartappsford365.com/badger-bi/> and download the .pbit file


Start using the Badger Power BI reports

When opening the Power BI .bit file you are asked to sign in and type in the company name.

Select company

It's important that you type in the name of the company you want to analyze exactly as its named in Dynamics 365 Business Central.



If you are uncertain of the naming of the company, open Dynamics 365 Business Central and search for “Companies” by clicking on the light bulb  on the App bar or use shortcut ALT+Q:

Select Companies

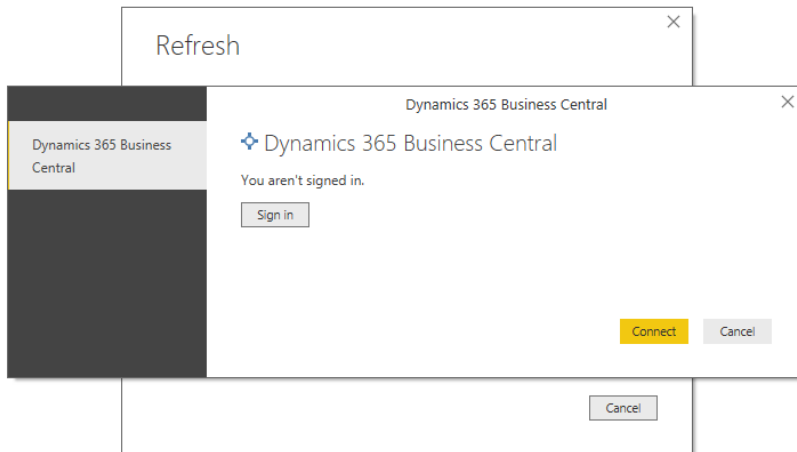


Set the name of the company in column "name".

NAME	DISPLAY NAME	EVALU... COMP...	ENABLE ASSIS... COMP... SETUP	SETUP STATUS
CRONUS SE	CRONUS SE	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Completed

Sign in

Sign in with your Office 365 account and choose connect.



Now the Power BI reports are updating.

As soon as all the tables have been updated you can start using the reports in Power BI desktop.

Power BI reports in Business Central



To be able to see the Power BI reports in Business Central, click on publish  in Power BI desktop.

You can publish the reports to your own workspace if only you are going to use the reports, or create a shared workspace in order to share the reports with others.

Once the reports are published you can choose to see them in Business Central.

Open the Power BI reports by going to a Power BI report in Business Central and click on "Select report"

