

The Strategic CFO Toolset for GP



David Eichner, CPA

➤ Experience

- Navy Veteran (Submarines)
- Nuclear Engineer
- CPA, CITP
- Database/Cloud Architect
- 30 years experience supporting Dynamics GP
- 14 years experience supporting Acumatica
- Product Manager for ICAN GP Add-In Products
- Product Manager for ICAN Acumatica Add-In Products
- Developer (VB, Dexterity, C#)



The Strategic CFO Toolset

- Exception Based SmartList Reminders
 - SmartList reminders can be used to identify issues needing resolution
- Business Alerts
 - Email notifications
- SQL Reports
 - SQL Management Studio
 - SQL Report Builder
- Power BI Reports
 - Power BI Desktop

SmartList Alerts

Custom Reminder - TWO16 (sa)

OK Cancel File Tools Help Add Note

Actions File Tools Help

SmartList Favorite

BalSheetAccountsMisclassifiedAsP&L

Category: Accounts

Visible to: System

Remind me when

Number of records

is greater than 0

Total of column

0.00

Display as a Cue

SmartList Alerts

Custom Reminder - TWO16 (sa)

OK Cancel File Tools Help Add Note

Actions File Tools Help

SmartList Favorite

Items Below Order Point Quantity

Category: Item Quantities

Visible to: System

Remind me when

Number of records

is greater than 0

Total of column

0.00

Display as a Cue

SmartList Alerts

Add or Remove Favorites

Category: Customers

Name: Past Due Customers

Visible To: System

Remove Modify **Add** Cancel

- Add favorite
- Add favorite and reminder

Customer Name	121 - 150 Days	151 - 180 Days	18
Mahler State Unive...	\$0.00	\$0.00	
Place One Suites	\$0.00	\$0.00	

SmartList Alerts = Custom Reminders

Reminder Preferences - TWO16 (sa)

OK File Tools Help Add Note

Actions File Tools Help

Predefined Reminders

	Remind Me	Remind Me	Display as a Cue
Overdue Invoices	<input type="checkbox"/>	0 days after due date.	<input type="checkbox"/>
Payables Due	<input type="checkbox"/>	0 days before due date.	<input type="checkbox"/>
Recurring General Ledger Batches	<input checked="" type="checkbox"/>	3 days before post date.	<input type="checkbox"/>
Recurring Receivables Batches	<input type="checkbox"/>	0 days before post date.	<input type="checkbox"/>
Recurring Payables Batches	<input type="checkbox"/>	0 days before post date.	<input type="checkbox"/>
Items Due for Stock Count	<input type="checkbox"/>	0 days before due date.	<input type="checkbox"/>
Collection Tasks Due	<input type="checkbox"/>	0 days before due date.	<input type="checkbox"/>
Lots Due to Expire	<input type="checkbox"/>		<input type="checkbox"/>

Custom Reminders

Name	Category	
BalSheetAccountsMisclassifiedAsP...	Accounts	
Customers Over Credit Limit*	Customers	
Items Below Order Point Quantity	Item Quantities	
Past Due Customer Transactions*	Receivables Transactions	
Payables Due Today*	Payables Transactions	
Receivables Due Today*	Receivables Transactions	

New
Modify
Remove


Demo - SmartList Alerts



Business Alerts

Define Business Alert

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Create a New Business Alert 

Business Alerts need to be given a name and description.

Use the Business Alert Wizard to create new business alerts or modify existing business alerts. An unlimited number of Business Alerts can be set up.


1. Select the database you want this alert to apply to.
2. Enter a Business Alert ID and a description.

Database:

Name:

Business Alert ID:


Description:

 << Back Next >> Cancel

SEEMS PRETTY EASY...

Select Tables

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Select Tables 

Select the Tables which will be used in the Business Alert definition.

Series: All


Tables

- Account Analysis Group Codes
- Account Analysis Groups
- Account Cache
- Account Catenru Master

Insert Remove

Selected Tables

- CM00100_T1 -- CM Checkbook Master

 << Back Next >> Cancel

I'M GETTING IT...

Define Alert Formula

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Define Business Alert Formula
Specify the conditions you want this alert to check for.

Operator

=	<	>	+	-	*	Avg	Sum	Min	Between	Like
<=	>=	<>	/	()	Max	Count	And	Or	Not

Table Column Name

Constant


Business Alert Formula

```
CM00100_T1.CURRBLNC < 0
```

THIS IS PRETTY COOL...

Alert Notification

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Alert Notification 

Select the people who should be notified when the alert conditions are met.

Send To E-mail User ID

Send Message Only Message and Report

To...

Alert Recipients

Message Text

MAYBE NOT...WHAT DO I DO NOW?

Microsoft Dynamics GP



The following error occurred in SQL Server: SQL Server blocked access to procedure 'dbo.sp_send_dbmail' of component 'Database Mail XPs' because this component is turned off as part of the security configuration for this server. A system admini.

OK

Configuring SQL Server For Email

- Login on SQL Server as the sa user
- Show Advanced Options
 - `SP_CONFIGURE 'show advanced options', 1 RECONFIGURE WITH OVERRIDE`
- Enable Database Mail XPs Advanced Options in SQL Server
 - `SP_CONFIGURE 'Database Mail XPs', 1 RECONFIGURE WITH OVERRIDE`
- Hide Advanced Options
 - `SP_CONFIGURE 'show advanced options', 0 RECONFIGURE WITH OVERRIDE`
- Reconfigure
 - `RECONFIGURE`



Configuring SQL Server For Email

The screenshot displays the Microsoft SQL Server Management Studio interface. The title bar reads "SQLQuery1.sql - LAPTOP33.master (LAPTOP33\David (51))* - Microsoft SQL Server Management Studio". The Object Explorer on the left shows the server hierarchy for "LAPTOP33 (SQL Server 11.0.3156 - LAPTOP33\David)", with "Database Mail" selected under the "Management" folder. The main query editor contains the following T-SQL script:

```
---run this statement first---
SP_CONFIGURE 'show advanced options', 1 RECONFIGURE WITH OVR

/* Enable Database Mail XPs Advanced Options in SQL Server

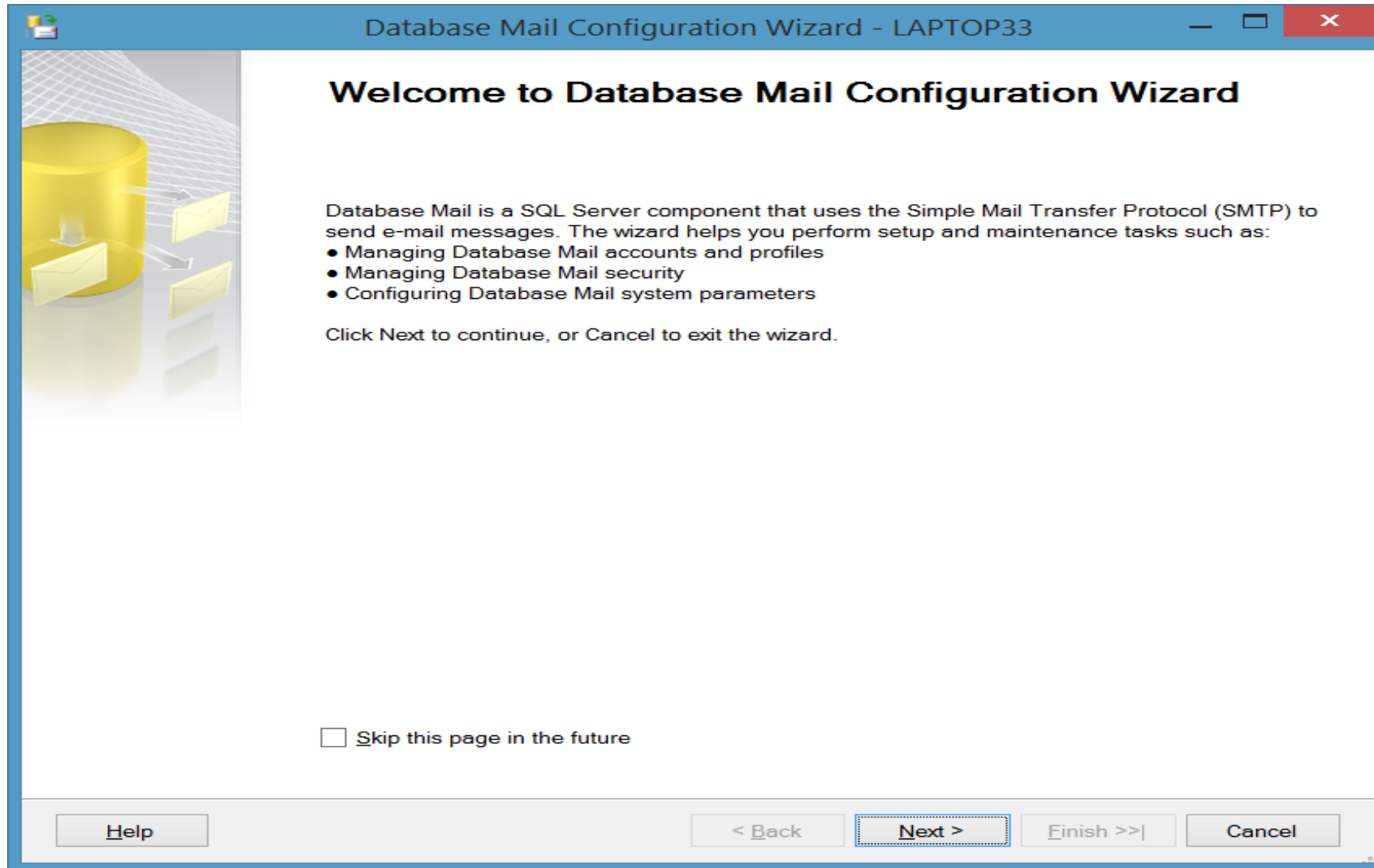
---run this statement second
SP_CONFIGURE 'Database Mail XPs', 1 RECONFIGURE WITH OVERRI

---run this statement third
SP_CONFIGURE 'show advanced options', 0 RECONFIGURE WITH OV

---run this statement last
RECONFIGURE
```

The Messages pane at the bottom shows the output: "Command(s) completed successfully." The status bar at the bottom indicates "Query... LAPTOP33 (11.0 SP1) | LAPTOP33\David (51) | master | 00:00:00 | 0 rows".

Configuring SQL Server For Email



Configuring SQL Server For Email

Database Mail Configuration Wizard - LAPTOP33

Select Configuration Task
Select setup or maintenance tasks.

If you are installing Database Mail for the first time, select the setup option.

- Set up Database Mail by performing the following tasks:
 1. Create a new e-mail profile and specify its SMTP accounts
 2. Specify profile security
 3. Configure system parameters
- Manage Database Mail accounts and profiles
- Manage profile security
- View or change system parameters

Help < Back Next > Finish >>| Cancel

Configuring SQL Server For Email

Database Mail Configuration Wizard - LAPTOP33

New Profile

Specify the profile name, description, accounts, and failover priority.

Profile name:

Description:

A profile may be associated with multiple SMTP accounts. If an account fails while sending an e-mail, the profile uses the next account in the priority list. Specify the accounts associated with the profile, and move the accounts to set the failover priority.

SMTP accounts:

Prio...	Account Na...	E-mail Address
---------	---------------	----------------

Configuring SQL Server For Email

New Database Mail Account

Specify name, description, and attributes for your SMTP account.

Account name: Office365MailAccount

Description:

Outgoing Mail Server (SMTP)

E-mail address: david@icansoftware.com

Display name: GP Business Alerts

Reply e-mail: david@icansoftware.com

Server name: smtp.office365.com Port number: 587

This server requires a secure connection (SSL)

SMTP Authentication

Windows Authentication using Database Engine service credentials

Basic authentication

User name: david@icansoftware.com

Password: *****

Confirm password: *****

Anonymous authentication

OK Cancel Help

Configuring SQL Server For Email

Database Mail Configuration Wizard - LAPTOP33

New Profile

Specify the profile name, description, accounts, and failover priority.

Profile name:

Description:

A profile may be associated with multiple SMTP accounts. If an account fails while sending an e-mail, the profile uses the next account in the priority list. Specify the accounts associated with the profile, and move the accounts to set the failover priority.

SMTP accounts:

Prio...	Account Name	E-mail Address
1	Office365MailAccount	david@icansoftware.com

Configuring SQL Server For Email

Database Mail Configuration Wizard - LAPTOP33

Manage Profile Security

Specify database users or roles that have access to profiles.

Public Profiles Private Profiles

A public profile can be accessed by all users of any mail-host database.

Select public profiles. You can also specify the default public profile.

Public	Profile Name	Default Profile
<input type="checkbox"/>	Office365Mail	No

Show only existing public profiles

Help < Back Next > Finish >> Cancel

Configuring SQL Server For Email

Database Mail Configuration Wizard - LAPTOP33

Manage Profile Security

Specify database users or roles that have access to profiles.

Public Profiles Private Profiles

A public profile can be accessed by all users of any mail-host database.

Select public profiles. You can also specify the default public profile.

Public	Profile Name	Default Profile
<input checked="" type="checkbox"/>	Office365Mail	Yes

Show only existing public profiles

Help < Back Next > Finish >> Cancel

Configuring SQL Server For Email

Database Mail Configuration Wizard - LAPTOP33

Configure System Parameters

View or change Database Mail system parameters.

System parameters:

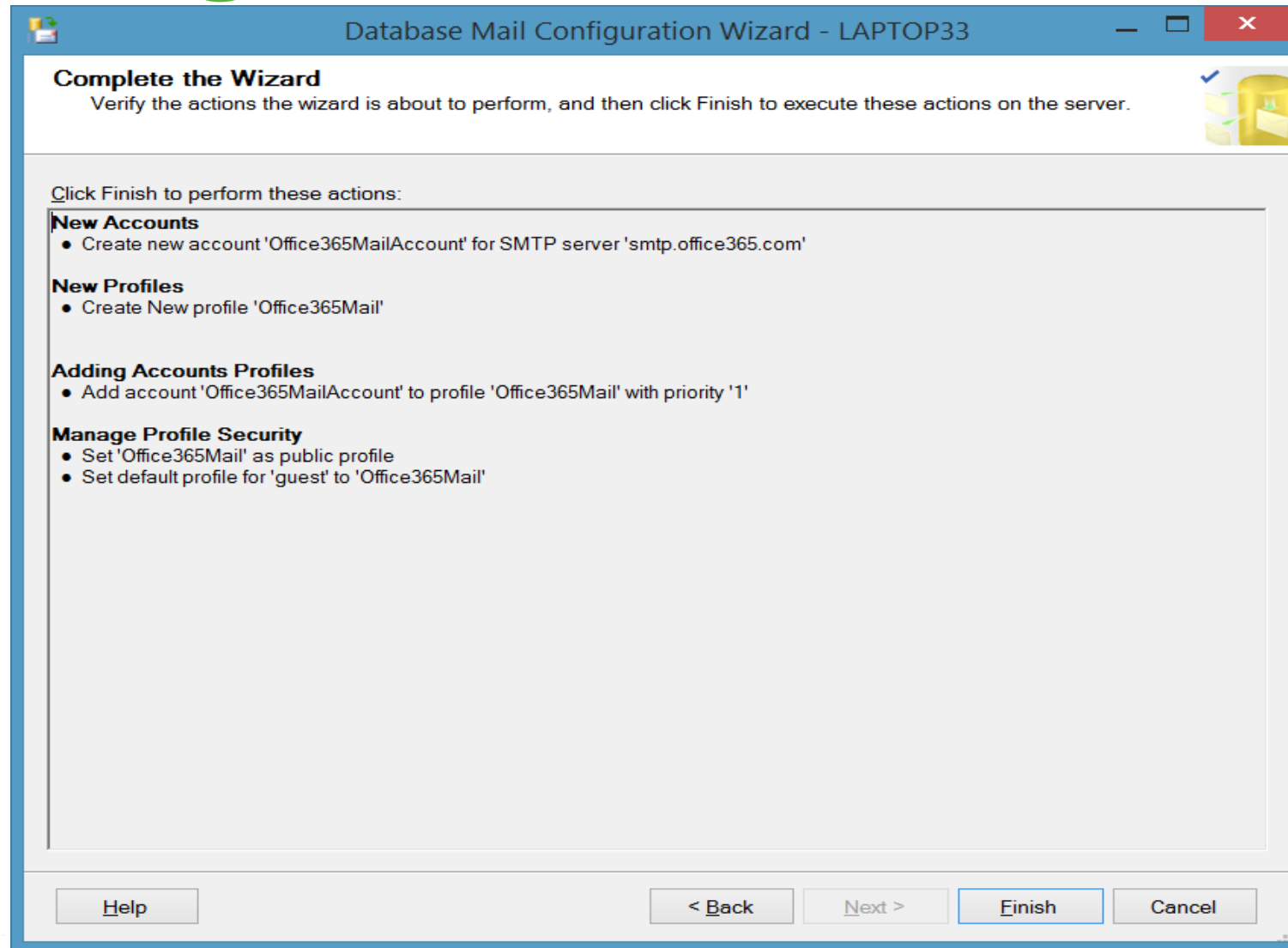
Parameter	Value
Account Retry Attempts	1
Account Retry Delay (seconds)	60
Maximum File Size (Bytes)	1000000
Prohibited Attachment File Extensions	exe,dll,vbs,js
Database Mail Executable Minimum Lifetime (seconds)	600
Logging Level	Extended

Number of retry attempts for a mail server to send email.

Reset All

Help < Back Next > Finish >> Cancel

Configuring SQL Server For Email



Configuring SQL Server For Email

The screenshot shows the 'Database Mail Configuration Wizard' window. The title bar reads 'Database Mail Configuration Wizard - LAPTOP33'. The main area is titled 'Configuring...' and includes the instruction 'Click Stop to interrupt the operation.' Below this, a summary box shows a green checkmark and the word 'Success', along with statistics: 4 Total, 4 Success, 0 Error, and 0 Warning. A 'Details:' section contains a table with four rows of actions, all marked as 'Success'. At the bottom, there are 'Stop', 'Report', and 'Close' buttons.

Configuring...
Click Stop to interrupt the operation.

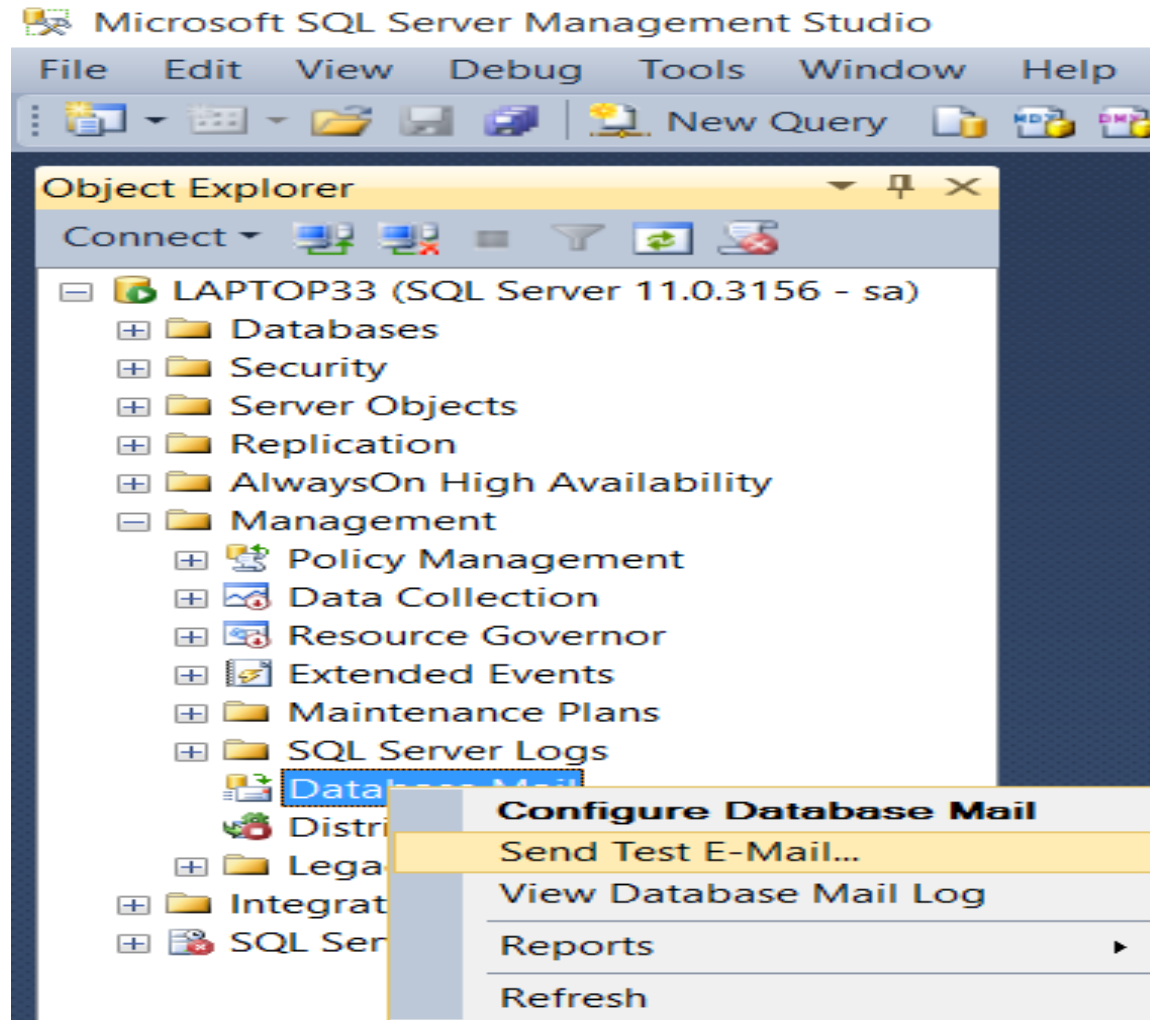
Success 4 Total 0 Error
4 Success 0 Warning

Details:

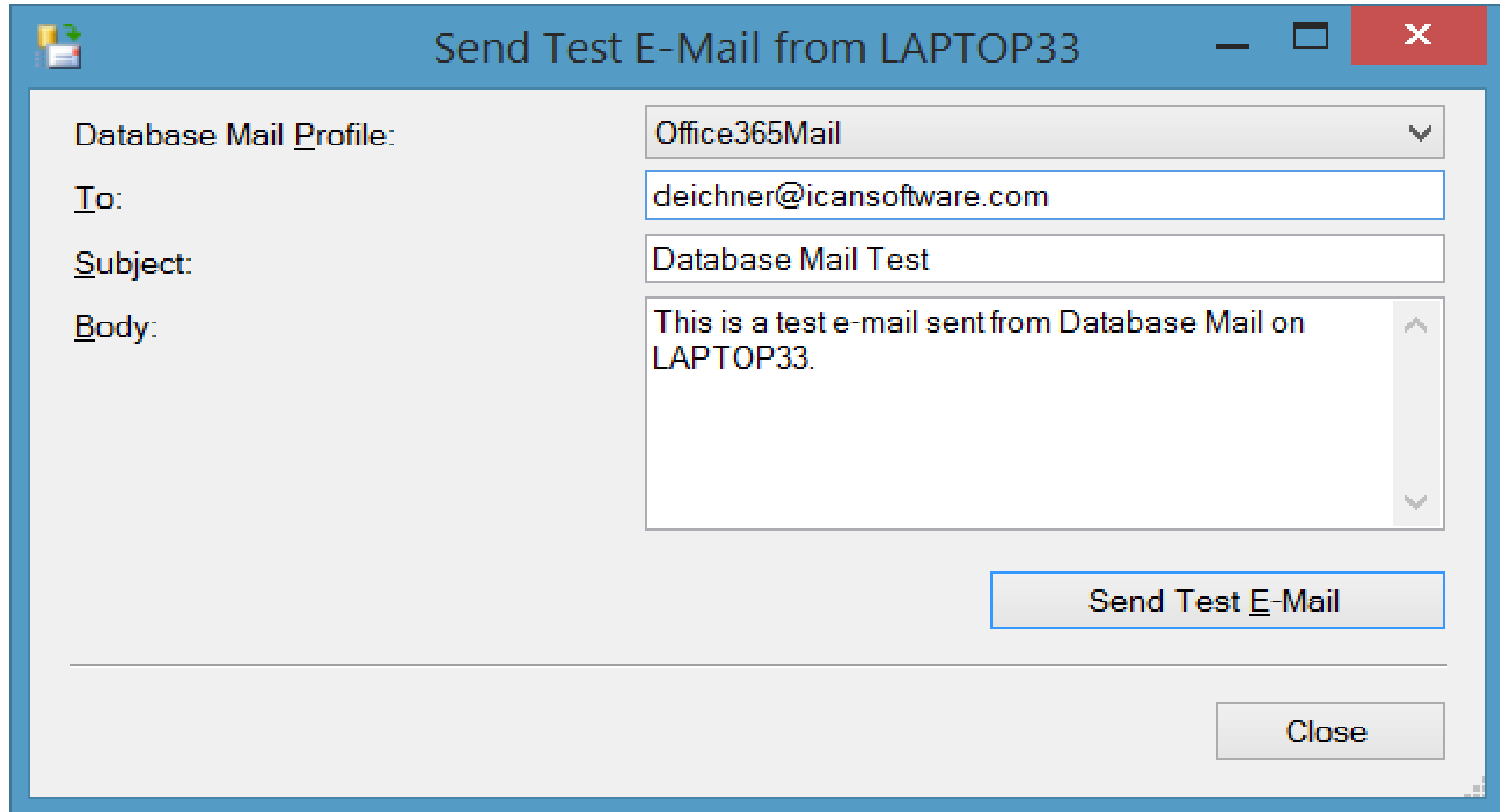
Action	Status	Message
✓ Create new account 'Office365MailAccount' for SMTP se...	Success	
✓ Create New profile 'Office365Mail'	Success	
✓ Add account 'Office365MailAccount' to profile 'Office365...	Success	
✓ Set default profile for 'guest' to 'Office365Mail'	Success	

Stop Report Close

Configuring SQL Server For Email



Configuring SQL Server For Email



Send Test E-Mail from LAPTOP33

Database Mail Profile: Office365Mail

To: deichner@icansoftware.com

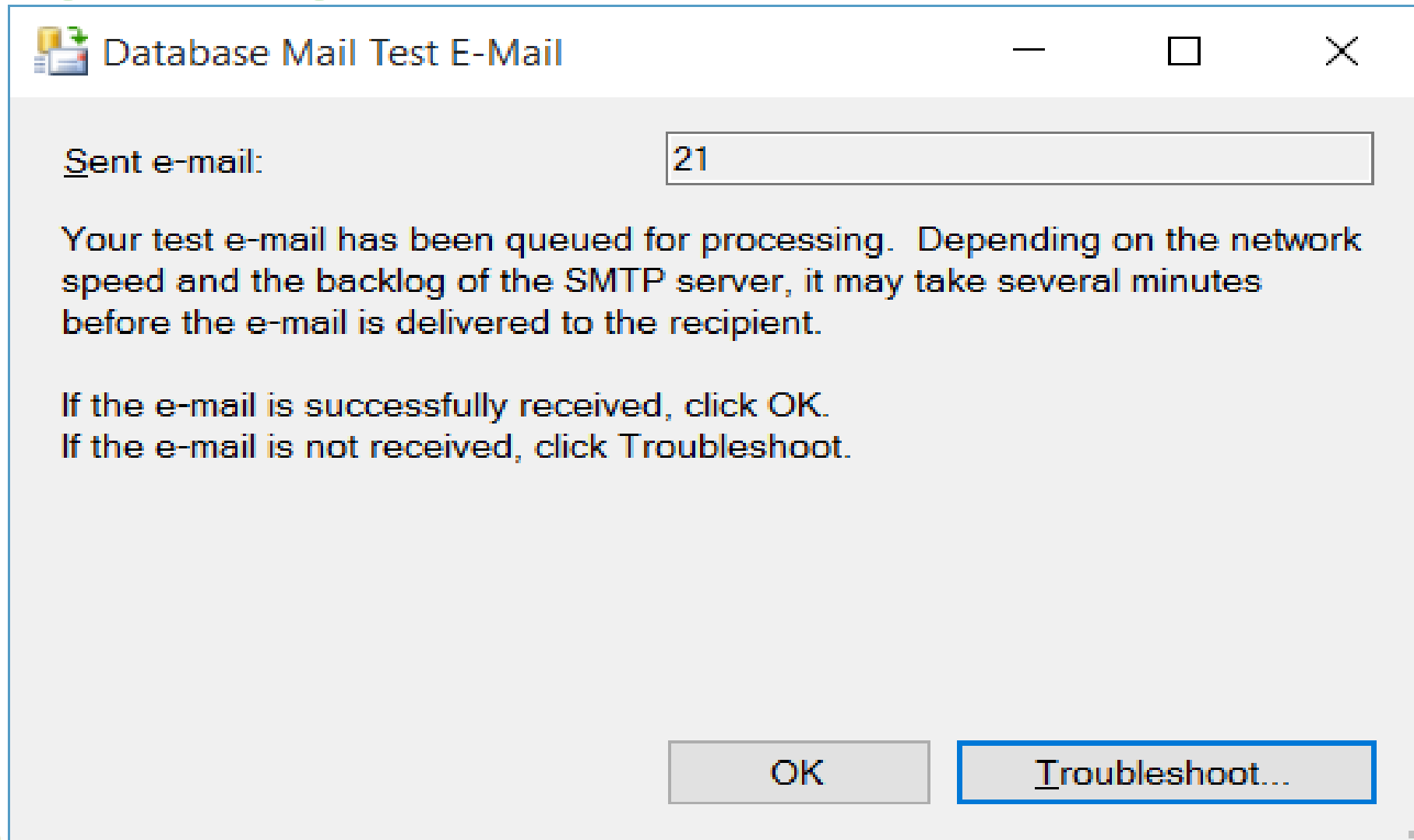
Subject: Database Mail Test

Body: This is a test e-mail sent from Database Mail on LAPTOP33.

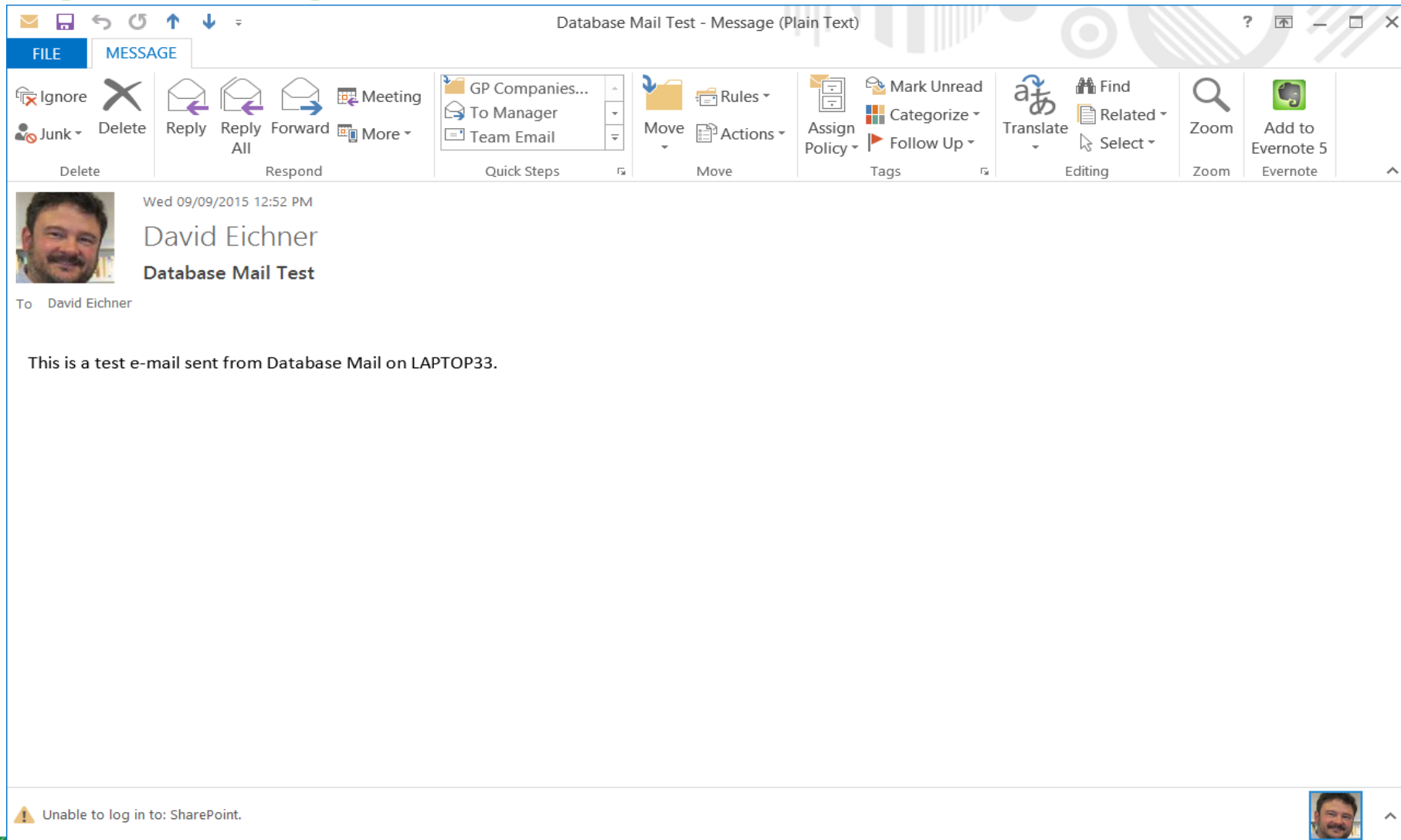
Send Test E-Mail

Close

Configuring SQL Server For Email



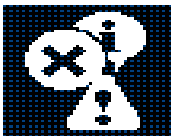
Configuring SQL Server For Email



Testing Business Alerts Email

Alert Notification

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Alert Notification 

Select the people who should be notified when the alert conditions are met.

Send To E-mail User ID

Send Message Only Message and Report

To...

Alert Recipients

Message Text

Testing Business Alerts Email

Select Report Columns

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Select Report Columns
Select the fields which will be displayed in the output text file.

Table
CM00100_T1 -- CM Checkbook Master

Columns

Account Index	▲	Insert
Allow Deposit Variance Dollar	■	Remove
Allow Deposit Variance Password	▼	
Bank Account Number		

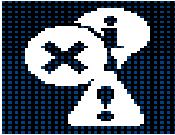
Report Column	Heading
CM00100_T1.CHEKCHKID	Checkbook
CM00100_T1.DSCRIPTN	Description
CM00100_T1.BNKACTNM	Bank_Account_Number
CM00100_T1.CURRBLNC	Balance

Help << Back Next >> Cancel

Testing Business Alerts Email

Select Report Sorting Options

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Report Sorting Options 

Define which columns you want the report to be sorted by

Select the columns to sort the report by.


Columns

CM00100_T1.DSCRIPTN
CM00100_T1.BNKACTNM
CM00100_T1.CURRBLNC

Insert Remove

Report Sort Order

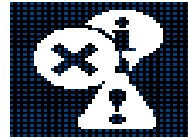
CM00100_T1.CHEKBKID

 << Back Next >> Cancel

Testing Business Alerts Email

Schedule Alert

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Schedule Alert 

When should the system check for the conditions of the Alert?

When Daily Weekly Monthly

Every Day(s)

Occurs

Once At:

Every: Minute(s)

Duration

Start Date No End Date

Keep Alert History Enable Business Alert

Testing Business Alerts Email

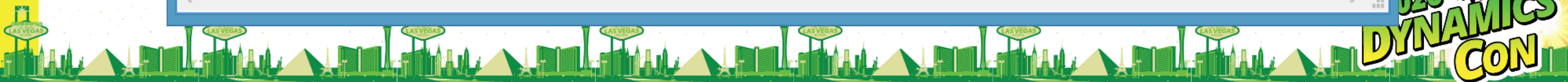
The screenshot shows an Outlook window with the following details:

- Window Title:** Fabrikam, Inc. ALERT: CHECKBOOK BAL - Checkbook Balance Below \$0.00 - Messag...
- Message Header:**
 - From:** David Eichner
 - Subject:** Fabrikam, Inc. ALERT: CHECKBOOK BAL - Checkbook Balance Below \$0.00
 - To:** David Eichner
- Attachments:** CHECKBOO.txt (1 KB)
- Body Text:** The attached checkbook balances have fallen below \$0.00
- Footer:** Unable to log in to: SharePoint.

Testing Business Alerts Email

```
CHECKBOO.txt - Notepad
File Edit Format View Help
-----
Checkbook      Description                Bank_Account_Number Balance
-----
PAYROLL        Payroll - Lakes Bank      5034033033          -1472863.71000
PETTY CASH     Petty Cash-Uptown Trust    07300360606         -100683.49000
140494012     140494012 cash balance    -4885000.00000
4900          4900                       -2190500.00000

(4 rows affected)
```



Editing Existing Business Alerts

Microsoft Dynamics GP

Home ▾

Microsoft Dynamics GP ▾ Transactions ▾ Inquiry ▾ Reports ▾ Cards ▾

User and Company
User Date
Edit
Tools ▾
Maintenance ▾
SmartList
Reminders
Task List
Process Monitor
Report Processing Status
User Preferences
Print Setup...
Print... Ctrl+P
Close All Windows
Exit

sa's Home

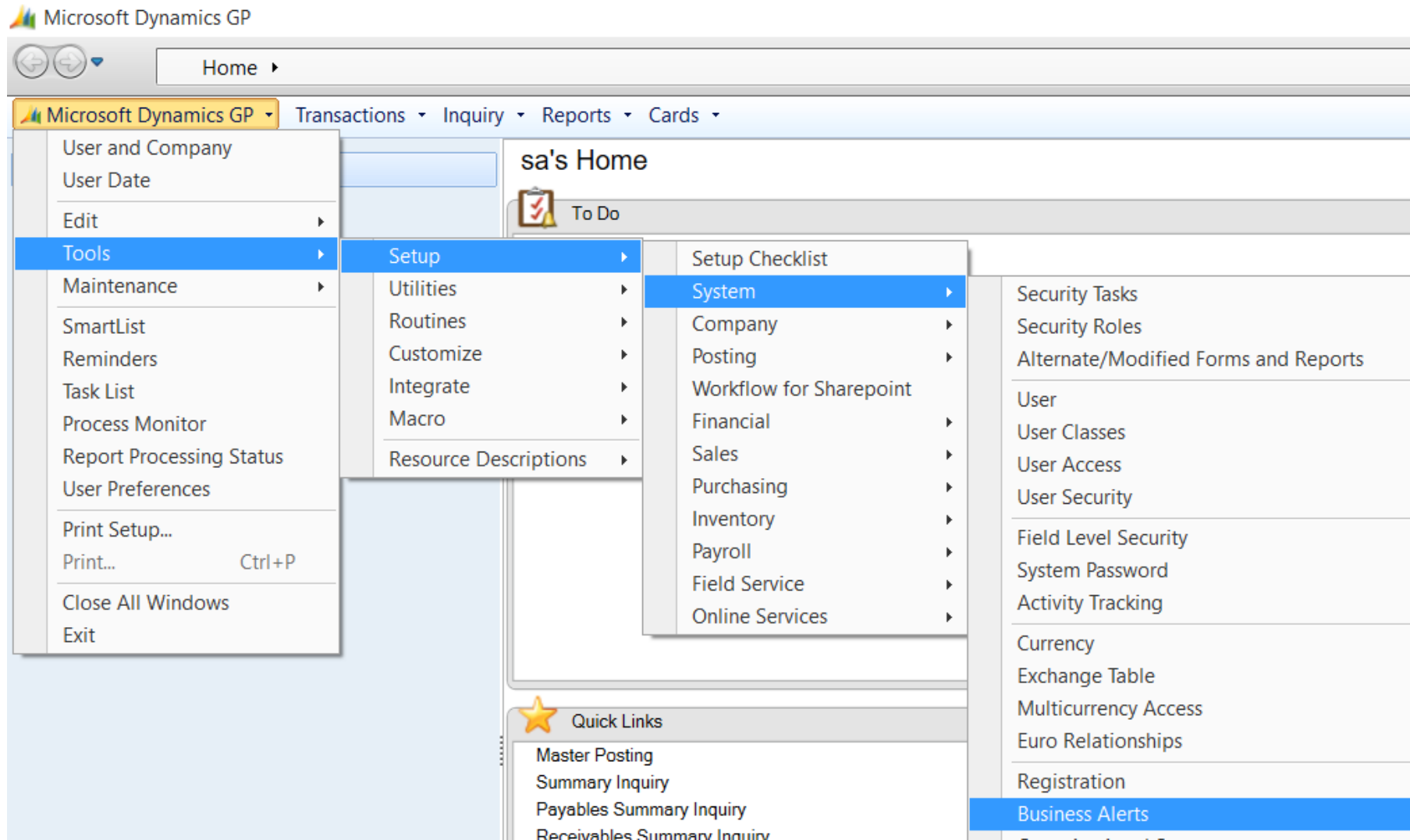
To Do

Setup ▾
Utilities ▾
Routines ▾
Customize ▾
Integrate ▾
Macro ▾
Resource Descriptions ▾

Setup Checklist
System ▾
Company ▾
Posting ▾
Workflow for Sharepoint
Financial ▾
Sales ▾
Purchasing ▾
Inventory ▾
Payroll ▾
Field Service ▾
Online Services ▾

Security Tasks
Security Roles
Alternate/Modified Forms and Reports
User
User Classes
User Access
User Security
Field Level Security
System Password
Activity Tracking
Currency
Exchange Table
Multicurrency Access
Euro Relationships
Registration
Business Alerts


★ Quick Links
Master Posting
Summary Inquiry
Payables Summary Inquiry
Receivables Summary Inquiry



Editing Existing Business Alerts

Business Alert Welcome

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017



Welcome to the Business Alert Wizard

Business Alerts can be used to set up a notification when a set of defined conditions are met. These conditions can be defined on a database used by Microsoft Dynamics GP.

Select **Modify Existing Alert** to choose from one of the existing alerts. To use the predefined alerts use the Wizard to provide alert recipients and an alert schedule.

To create a new alert choose the **Create New Alert** option and step through the wizard.

Choose the Alert Option and choose **Next** to continue.

Alert Options


Create New Alert **Modify Existing Alert**

Next >> Cancel

Editing Existing Business Alerts

Select Existing Alert

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017


Select a Business Alert 

Which existing business alert do you want to modify?

Select the database for which an existing alert has been created.
Select the Business Alert from the list box and choose Next to continue.

Databases Name


Business Alert	Description	Database
OVERTIME PAY	Overtime Pay For The	TWO
PM DOC HOLD	Payables Document Hc	TWO
PM PAST DUE	PM Past Due Vendors	TWO
RM PAST DUE	Customer Past Due	TWO
SALES DOC HOLD	Sales Documents On h	TWO
VENDOR HOLD	Vendors On Hold	TWO

 << Back Next >> Cancel

Editing Existing Business Alerts

Define Business Alert

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017


Create a New Business Alert 

Business Alerts need to be given a name and description.

Use the Business Alert Wizard to create new business alerts or modify existing business alerts. An unlimited number of Business Alerts can be set up.

1. Select the database you want this alert to apply to.
2. Enter a Business Alert ID and a description.


Database:	<input type="text" value="TWO"/>
Name	<input type="text" value="Fabrikam, Inc."/>
Business Alert ID	<input type="text" value="RM PAST DUE"/>
Description	<input type="text" value="Customer Past Due"/>

 << Back Next >> Cancel

Editing Existing Business Alerts

Select Tables

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Select Tables 

Select the Tables which will be used in the Business Alert definition.

Series:


Tables

- Account Analysis Group Codes
- Account Analysis Groups
- Account Cache
- Account Categorization Master

Insert Remove

Selected Tables


- RM00101_T2 -- RM Customer MSTR
- RM00103_T1 -- Customer Master Summary

 << Back Next >> Cancel

Editing Existing Business Alerts

Joining Tables

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Joining Tables 

If multiple tables are used, their relationship needs to be defined.


Select two tables you want to join

RM00101_T2 -- RM Customer Master Summary
RM00103_T1 -- Customer Master Summary

Select the columns that are in common between those tables and click Insert.

Joined Tables

RM00103_T1.CUSTNMBR = RM00101_T2.CUSTNMBR



Editing Existing Business Alerts

Define Alert Formula

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Define Business Alert Formula
Specify the conditions you want this alert to check for.

Operator

=	<	>	+	-	*	Avg	Sum	Min	Between	Like
<=	>=	◇	/	()	Max	Count	And	Or	Not

Table Column Name

Constant


Business Alert Formula

```
(RM00103_T1.AGPERAMT_2 > 0 OR RM00103_T1.AGPERAMT_3 > 0 OR  
RM00103_T1.AGPERAMT_4 > 0 OR RM00103_T1.AGPERAMT_5 > 0 OR  
RM00103_T1.AGPERAMT_6 > 0 OR RM00103_T1.AGPERAMT_7 > 0)
```

Editing Existing Business Alerts

Alert Notification

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Alert Notification 

Select the people who should be notified when the alert conditions are met.

Send To E-mail User ID

Send Message Only Message and Report

To...

Alert Recipients

deichner@icansoftware.com


Message Text

The attached list of customers have past due balances.

Editing Existing Business Alerts

Select Report Columns

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Select Report Columns 


Select the fields which will be displayed in the output text file.

Table

Columns

Insert
Remove


Report Column	Heading
RM00101_T2.CUSTNMBR	Customer_Number
RM00101_T2.CUSTNAME	Name
RM00103_T1.AGPERAMT_2	Thirty_One_to_Sixty
RM00103_T1.AGPERAMT_3	Sixty_One_to_Ninety

 << Back Next >> Cancel

Editing Existing Business Alerts

Select Report Sorting Options

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Report Sorting Options 

Define which columns you want the report to be sorted by

Select the columns to sort the report by.


Columns

RM00101_T2.CUSTNAME	▲
RM00103_T1.AGPERAMT_2	
RM00103_T1.AGPERAMT_3	
RM00103_T1.AGPERAMT_4	▼

Insert Remove

Report Sort Order


RM00101_T2.CUSTNMBR

 << Back Next >> Cancel

Editing Existing Business Alerts

Schedule Alert

File Edit Tools Help sa Fabrikam, Inc. 04/12/2017

Schedule Alert 

When should the system check for the conditions of the Alert?

When Daily Weekly Monthly

Daily Every Day(s)

Occurs Once At: Every: Minute(s) Starting At: Ending At:

Duration Start Date End Date No End Date

Keep Alert History Enable Business Alert

Useful New Business Alerts

- New GL Account
- New Vendor
- New Employee
- Excessively High Credit Limit
- Payments To A Specific Vendor
- Employee Check With Zero Amount
- Employee With Leave Balance Above Certain Level



Demo - Business Alerts



SQL Management Studio

- Free download from Microsoft at
 - <https://learn.microsoft.com/en-us/ssms/install/install>
 - You can use SQL Management Studio to quickly create the query you need for your custom report.



Microsoft Report Builder

- Free download from Microsoft at
 - <https://www.microsoft.com/en-us/download/details.aspx?id=53613&msockid=34e51053d69965d91a84077cd78a64ca>
- You can use Report Builder to quickly create the reports you need. Report Builder provides data visualizations that include charts, maps, sparklines, and data bars.



Microsoft Report Builder

- Works with any version of SQL Server in addition to many other sources of data.
 - Microsoft SQL Azure
 - OLEDB
 - Oracle
 - ODBC
 - XML



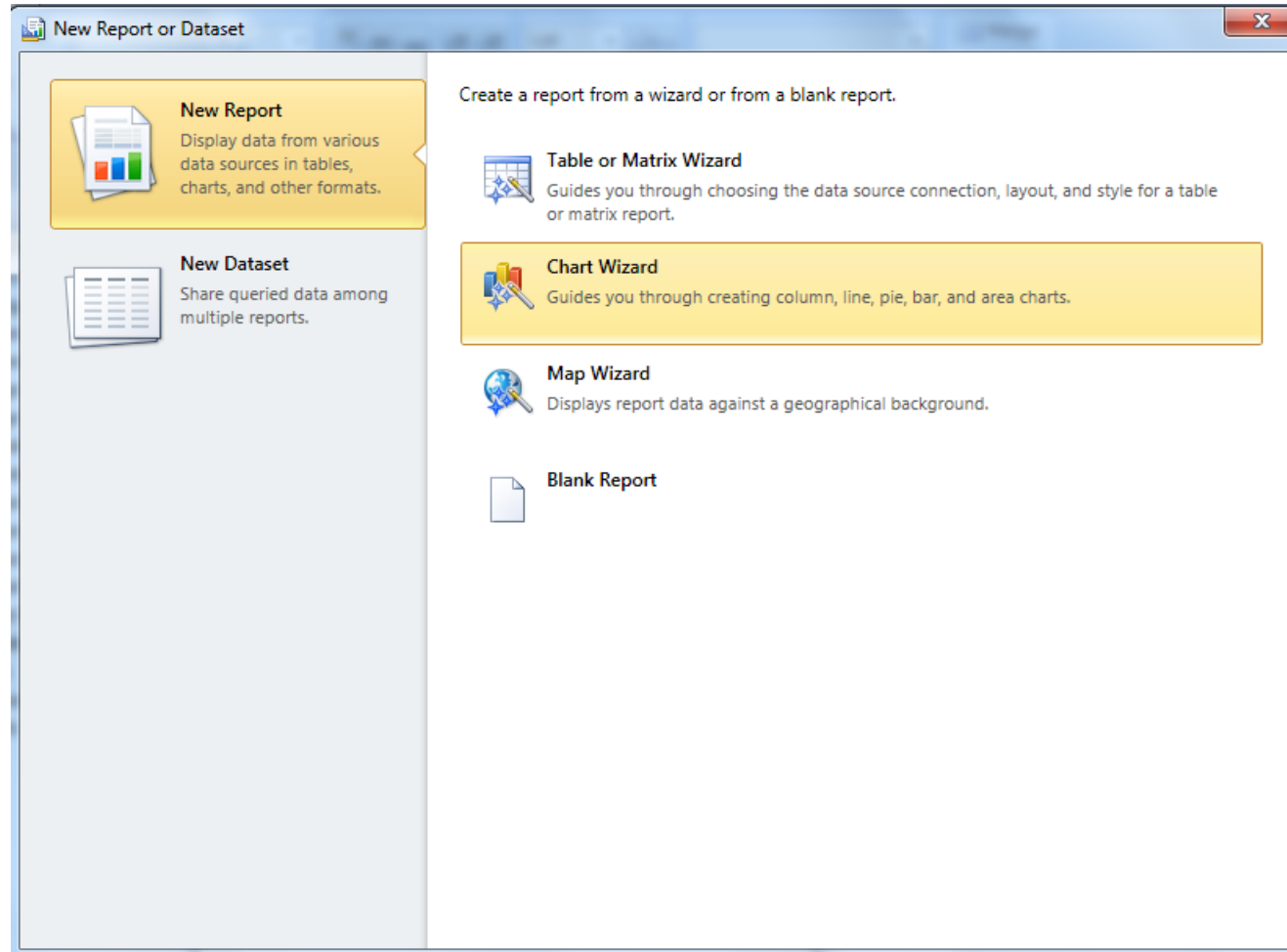
Microsoft Report Builder

- Features
 - Can add parameters
 - Reference system variables
 - Can publish report parts
 - Wizards for creating reports, charts, KPI, and data plots against maps



Microsoft Report Builder

- Wizards



DEMO – SQL Management Studio and Microsoft Report Builder



Microsoft Power BI

- Free download from Microsoft at
 - <https://www.microsoft.com/en-us/download/details.aspx?id=58494&msockid=3c7551c069536adf1b9d444a68fb6bc0>
 - Microsoft Power BI Desktop is built for the analyst. It combines state-of-the-art interactive visualizations, with industry-leading data query and modeling built-in. Create and publish your reports to Power BI.
 - Useful when data needs to be transformed in a number of steps



Microsoft Power BI

Imagine. Create. Accomplish.

Microsoft 365 delivers cloud storage, advanced security, and Microsoft Copilot in your favorite apps—all in one plan.

[Shop Microsoft 365](#)



Microsoft Power BI Desktop

Microsoft Power BI Desktop is built for the analyst. It combines state-of-the-art interactive visualizations, with industry-leading data query and modeling built-in. Create and publish your reports to Power BI. Power BI Desktop helps you empower others with timely critical insights, anytime, anywhere.

Important! Selecting a language below will dynamically change the complete page content to that language.

Select language

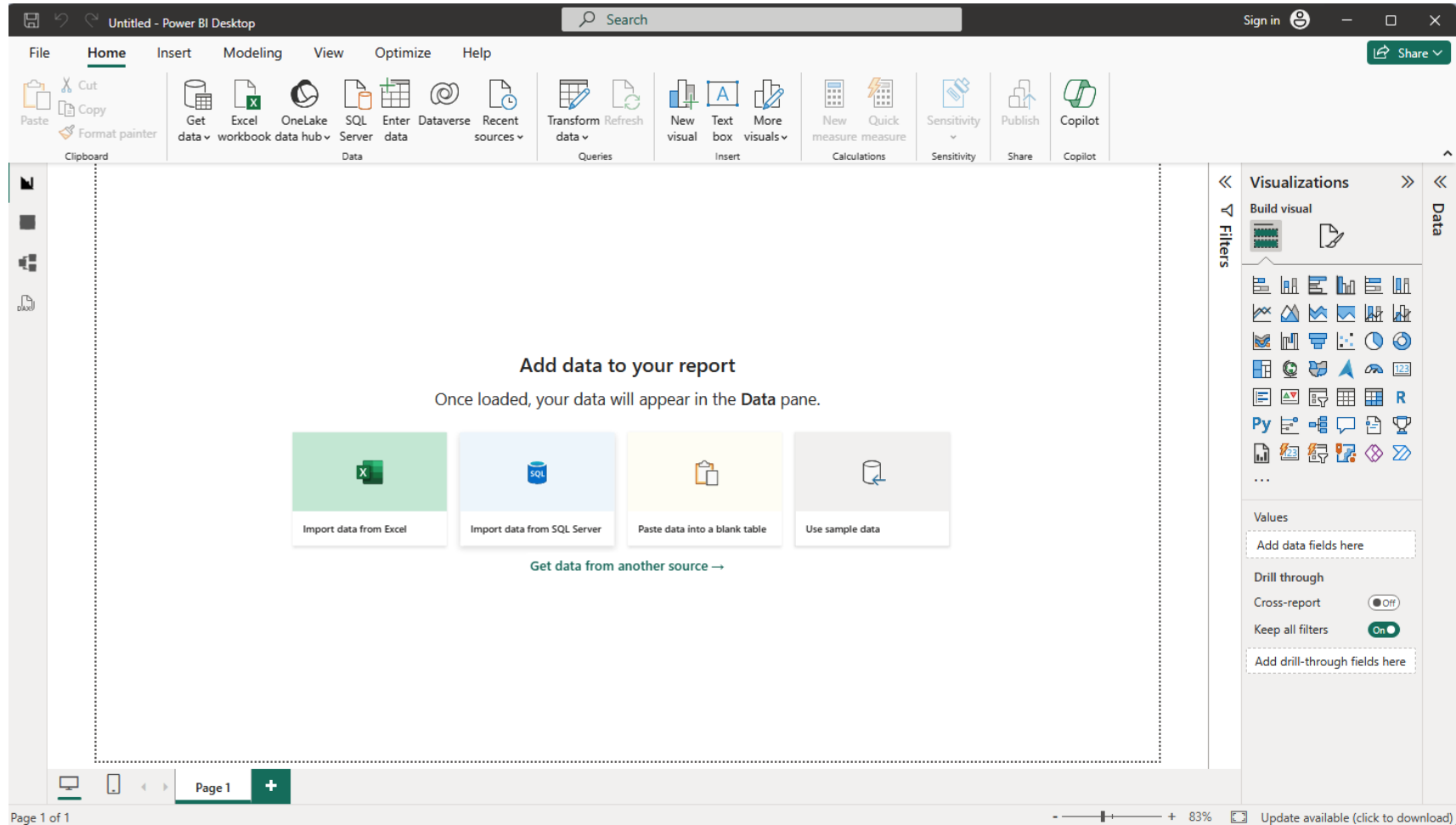
English



[Download](#)



Microsoft Power BI



Microsoft Power BI

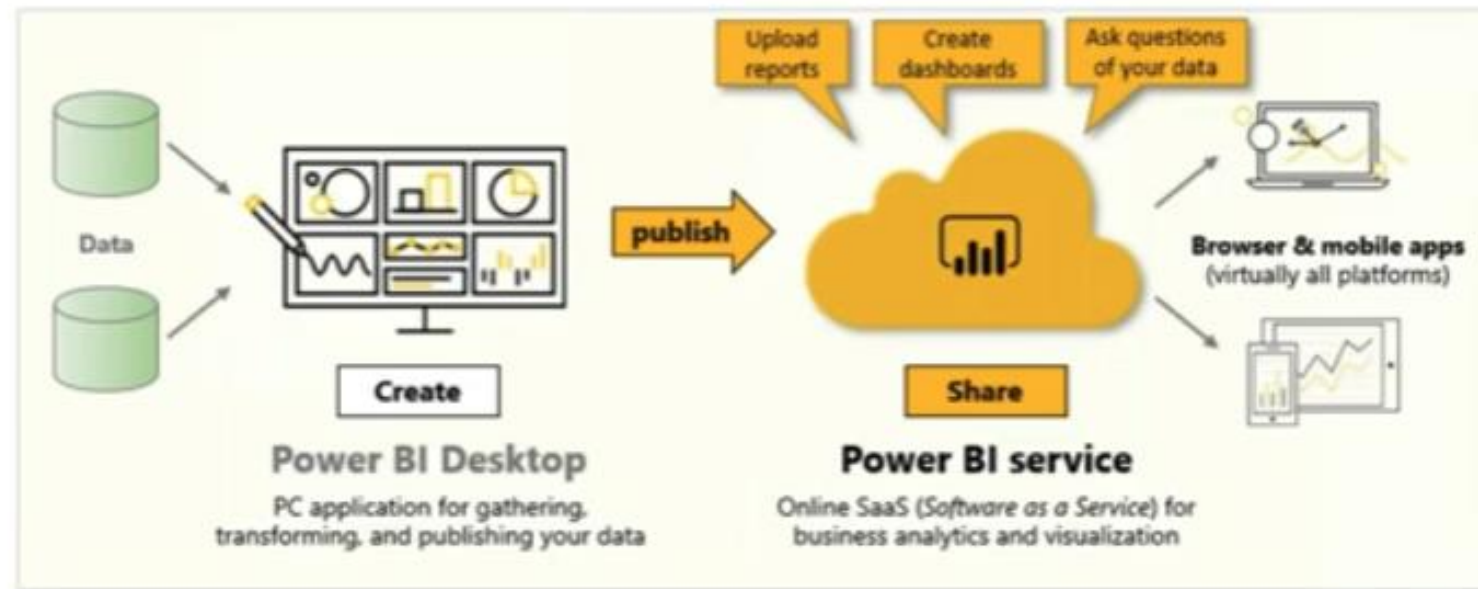
What is Power BI?

- ✓ Business Intelligence Software
- ✓ Interactive Data Visualization Tool
- ✓ Part of The Microsoft Power Platform
- ✓ Cloud-based Service
- ✓ Created for Self-service Analytics



Microsoft Power BI

Dynamic User Interface



Microsoft Power BI

Why Power BI?

- ✓ Almost Real-time Insights
- ✓ Integration with Microsoft Stack
- ✓ Customizable Visualizations
- ✓ Cost of Ownership

Power BI Pro	Power BI Premium	
Per user	Per user	Per capacity
\$9.99 Per user/month	\$20 Per user/month ¹	\$4,995 Per capacity/month
License individual users with modern, self-service analytics to visualize data with live dashboards and reports, and share insights across your organization.	License individual users to accelerate access to insights with advanced AI, unlock self-service data prep for big data, and simplify data management and access at enterprise scale.	License your organization with capacity to accelerate access to insights with advanced AI, unlock self-service data prep for big data, and simplify data management and access at enterprise scale—without per-user licenses for content consumers.
<ul style="list-style-type: none">• Power BI Pro is included in Microsoft 365.• Available to buy now with a credit card².	<ul style="list-style-type: none">• Includes all the features available with Power BI Pro.• Available to buy now with a credit card².	<ul style="list-style-type: none">• Requires a Power BI Pro license for publishing content into Power BI Premium capacity.• Enable autoscale with your Azure subscription to automatically scale Power BI Premium capacity.
Buy now >	Buy now >	Contact sales >

Microsoft Power BI

Why Power BI?

- ✓ Almost Real-time Insights
- ✓ Integration with Microsoft Stack
- ✓ Customizable Visualizations
- ✓ Cost of Ownership
- ✓ Quick Return on Investment
- ✓ Best BI Tool on The Market



Microsoft Power BI

Working with GP Data

- Connecting to GP Data
 - Odata Connection vs. SQL Server
- Cleaning up Data
 - Choose which columns to view
 - Transform or clean up cell data
 - Add formulas and new columns
- Create your Visualizations

Microsoft Power BI

The screenshot displays the Microsoft Power Query Editor interface. The main area shows a data table with the following columns: Customer Number, Customer Name, State, and six Aging Buckets (Aging Bucket1 through Aging Bucket6). The data is sorted by Customer Number. The right-hand pane shows the 'QUERY SETTINGS' for the 'Customers' query, with the 'Applied Steps' list containing 'Source', 'Navigation', and 'Removed Other Columns'.

Customer Number	Customer Name	State	1.2 Aging Bucket1	1.2 Aging Bucket2	1.2 Aging Bucket3	1.2 Aging Bucket4	1.2 Aging Bucket5	1.2 Aging Bucket6
1	AARONFIT0001	WA	4373.02	0	0	0	0	0
2	ADAMPARK0001	IN	3629.73	0	0	0	0	0
3	ADVANCED0001	IL	0	0	0	0	0	0
4	ADVANCED0002	ON	-1016.24	0	0	0	0	0
5	ALTONMAN0001	MI	0	0	0	0	0	0
6	AMERICAN0001	MO	0	0	0	0	0	0
7	AMERICAN0002	IA	0	0	0	0	0	0
8	ASSOCIAT0001	NE	695.4	0	0	0	0	0
9	ASTORSUI0001	IN	1405.87	0	0	0	0	0
10	ATMORERED0001	IL	0	0	0	0	0	0
11	BAKERSEM0001	IN	9479.69	0	0	0	0	0
12	FOURTHCO0001	NE	0	0	0	0	0	0
13	BERRYMED0001	WI	0	0	0	0	0	0
14	BOYLESO0001	VIC	0	0	0	0	0	0
15	BREAKTHRO0001	PQ	0	0	0	0	0	0
16	CONTOSO0001	NE	68447.65	0	0	0	0	0
17	CASTLEIN0001	ON	0	0	0	0	0	0
18	CELLULAR0001	IL	1405.87	0	0	0	0	0
19	CENTERSU0001	MIN	-10218.93	0	0	0	0	0
20	CENTRALCO0001	IL	-375	0	0	0	0	0
21	CENTRALD0001	WI	1405.87	0	0	0	0	0
22	CENTRALI0001	IL	0	0	0	0	0	0
23	COMMUNIC0001	MB	42.59	0	0	0	0	0
24	COMMUNIC0002	BC	31.94	0	0	0	0	0
25	COMPUTEC0001	WI	230.05	0	0	0	0	0
26	COMPUTER0001	WI	-85.65	0	0	0	0	0
27	COMPUTER0002	AB	0	0	0	0	0	0
28	COMPUTER0003	NSW	-352.33	0	0	0	0	0
29	COMTELP0001	IA	0	0	0	0	0	0
30	CONTINEN0001	NSW	0	0	0	0	0	0
31	COUNTRYV0001	Country View Estates	89.89	0	0	0	0	0
32	CRAWFORD0001	Crawfords, Inc.	0	0	0	0	0	0
33	DATACOMM0001	Data Communications Inc.	0	0	0	0	0	0
34	DIALDIRE0001	Dial Direct Paging Inc.	0	0	0	0	0	0
35	DIRECTMA0001	Direct Marketers	0	0	0	0	0	0
36	DOLLISCO0001	Dollis Cove Resort	0	0	0	0	0	0
37	GETAWAYI0001	Getaway Inn	0	0	0	0	0	0
38	EXECUTIV0001	Executive Resources	0	0	0	0	0	0



Thank You

- David Eichner, CPA
 - david@icansoftware.com
 - 253.434.3034
 - <https://www.linkedin.com/in/icansoftware>
 - <http://icancloudapps.com>

ICAN
Software Solutions

