



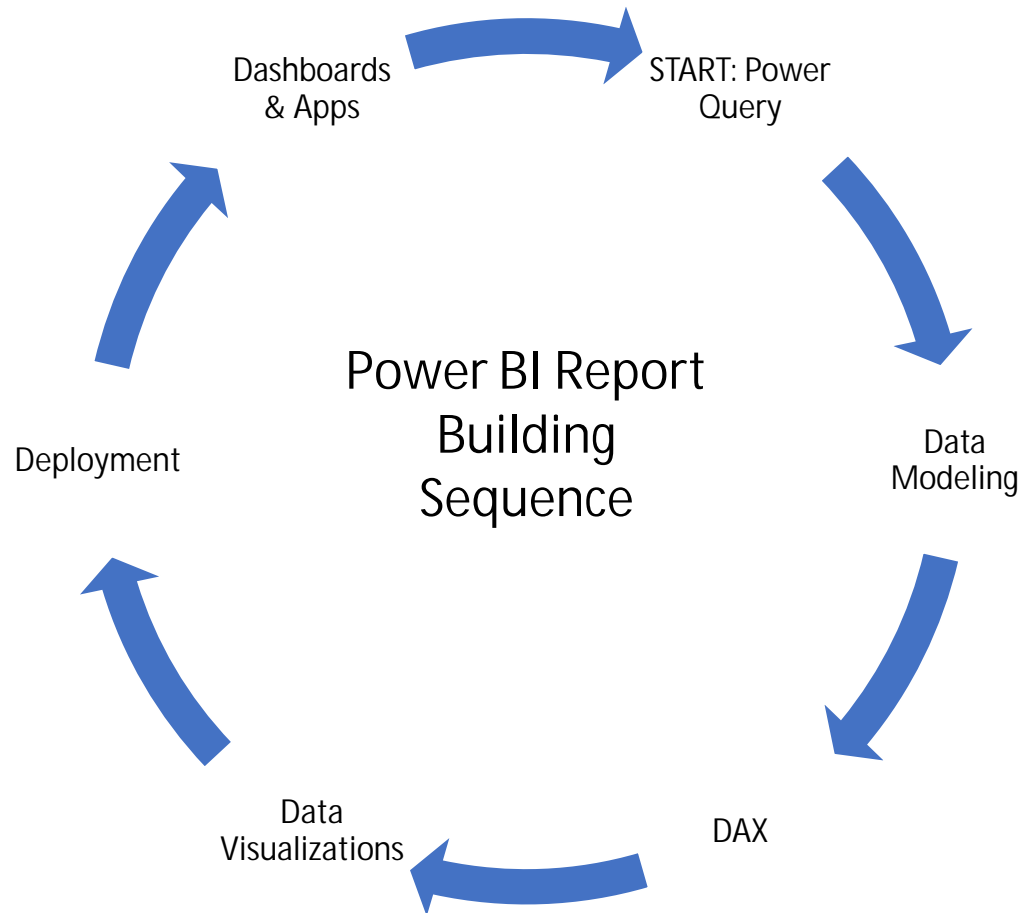
The Potential of Power BI for Credit Managers

Presented by: Rebekyah Brewer

Date: May 20, 2025

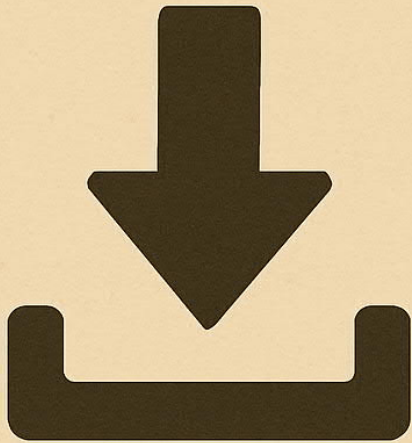
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DOWNLOAD FILES



Session 1 Files Download:

Power BI Potential
for Credit Managers

Password: NACM2025

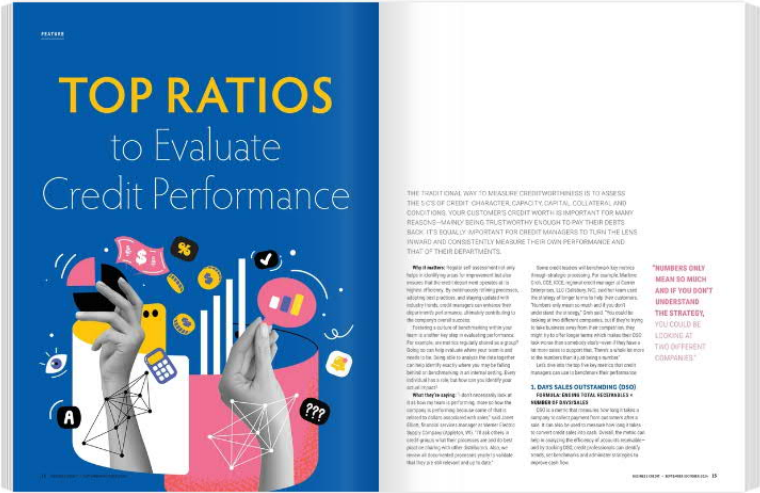
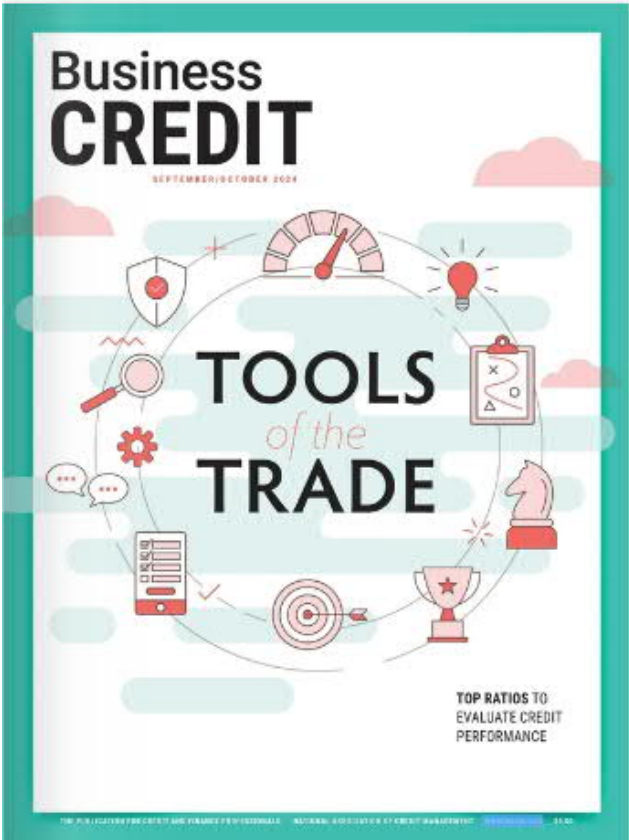
<https://tinyurl.com/NACMPowerBIPotential>



Link Expiration: 6/18/2025

*“Power BI is
simple,
but it’s not
easy.”*

- POWER BI
COMMUNITY



Top Ratios	Formula
1. Days Sales Outstanding (DSO)	$\text{Ending Total Receivables} \times \text{Number of Days/Sales}$
2. Percent of Age Category (30,60,90, Future, Current, Past-Due Buckets)	$\frac{\text{Total Amount in Chosen Age Category and Above}}{\text{Total Receivables}} \times 100$
3. Average Days Delinquent (Add)	$\frac{\text{Days Sales Outstanding} - \text{Best Possible Days Sales Outstanding}}{\text{Number of Delinquent}}$
4. Bad Debt as a Percent of Sales	$\frac{\text{Bad Debt Net of Recoveries}}{\text{Sales}} \times 100$
5. Cash Collected as a Percent Available to Collect for the Month	$\frac{\text{Amount Collected within the month/amount available to collect (E.G. Current Receivables + Past Dues - Deductions)}}{\text{Amount Available to Collect}} \times 100$

AR

Accounts Receivable

AR Portfolio Summary

PaymentPulse

Credit Risk Review

Lien Notice Monitor

AR Historical Time Buckets

Collections Status Monitor

Aging by Period

Unapplied Cash Monitor

Credit Memo Monitor

Customer & Location Setups...

AR Financials Power BIs

Tax Certificate Monitor

Job Close Status Monitor

AR Performance Trends

Regional AR Performance Trends

AR Comparison

EOM Summary

Service Trend Comparison

Bad Debt Report

Bad Debt WO % of Revenue

Bad Debt Summary

N180 Potential Bad Debt

Unrecovered Bad Debt WO

Credit Card Activity

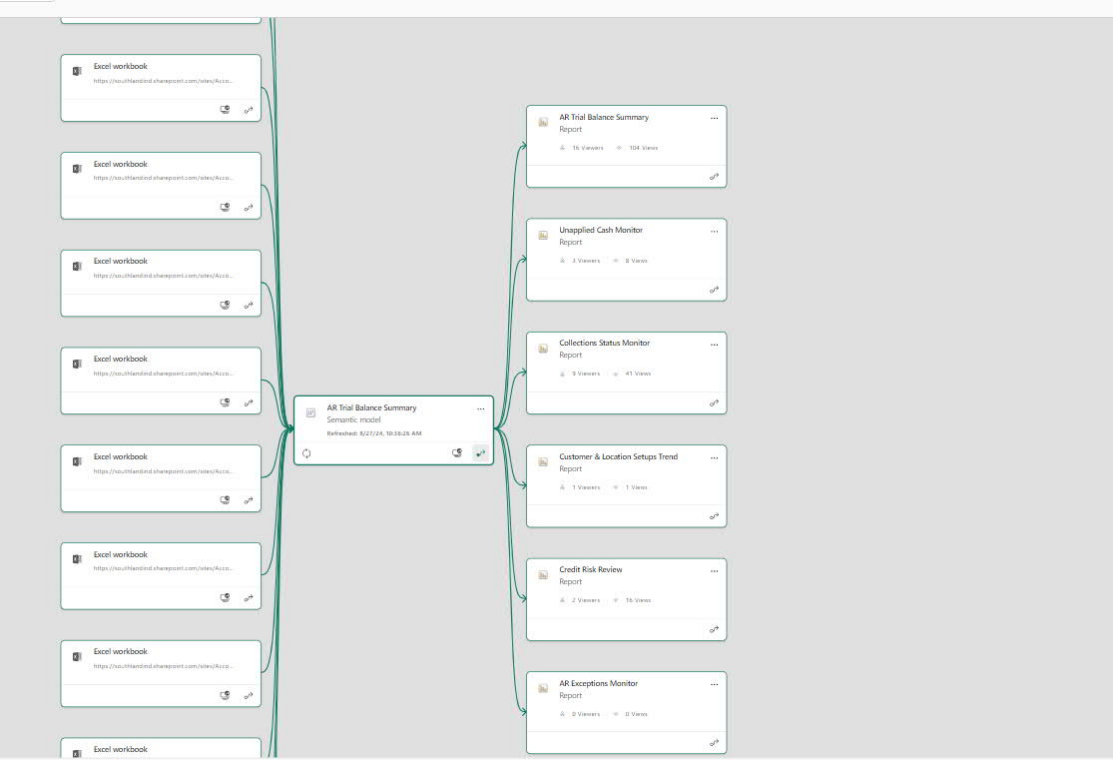
Volume Trend

CC Activity

Customer Volume

Transaction Detail

CC Entry Method





AR Portfolio Summary

AR Balance:

\$33.74M

Salesperson Name

All

Region

- ☐ Midwest Region
- ☐ Northeast Region

City

- ☐ Chicago
- ☐ Peoria
- ☐ Scranton
- ☐ Springfield

Trade Description

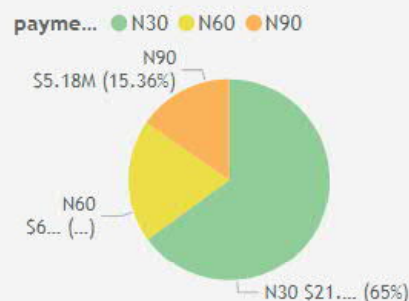
- ☐ Access Control Systems
- ☐ Closed-Circuit Television
- ☐ Cybersecurity
- ☐ HWD Development
- ☐ Monitoring Services
- ☐ Software Development
- ☐ Systems Integration

SafeNetrix

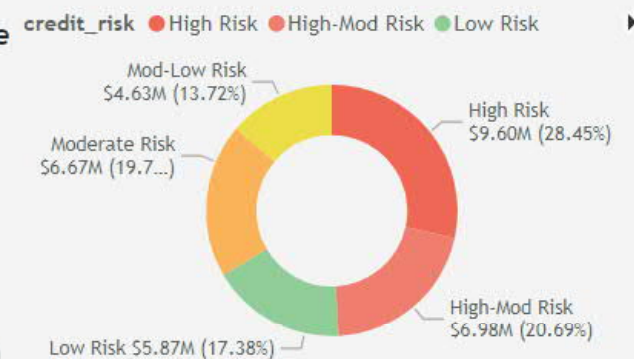
SafeZone Installations

AR Aging Bands - DBTAge	Inv Balance	Doc#	Customers#
00 DBT	\$21,111,213.00	73	70
01-30 DBT	\$8,226,021.00	34	31
30-60 DBT	\$2,342,186.00	10	10
60-90 DBT	\$1,087,674.50	4	4
90+ DBT	\$977,303.00	5	5
Total	\$33,744,397.50	126	117

Payment Terms Open Balance



Credit Risk Open Balance



Top 10 Open Balances

Company_Name	Inv Balance	#Docs
Bartoletti, Kuhlman and Reynolds	\$591,199.00	2
Conroy LLC	\$495,248.00	1
Davis-Kunde	\$970,212.00	3
Gulgowski, Fritsch and Reinger	\$583,163.00	2
Jacobs-Ward	\$634,678.00	2
Jerde-Flatley	\$780,003.00	2
O'Hara Inc	\$496,326.00	1
Walsh-Batz	\$493,666.00	1
Willms Group	\$878,281.00	2
Wiza-Greenfelder	\$613,069.00	2
Total	\$6,535,845.00	18

Top 10 Past Due Balances

Company_Name	Past Due ALL	#Docs
Davis-Kunde	\$970,212.00	3
Willms Group	\$878,281.00	2
Jacobs-Ward	\$634,678.00	2
Wiza-Greenfelder	\$613,069.00	2
O'Hara Inc	\$496,326.00	1
Conroy LLC	\$495,248.00	1
Wehner, Sanford and Durgan	\$488,791.00	1
Nolan-McClure	\$477,848.00	1
Renner-Wilderman	\$434,625.00	1
Trantow-Kris	\$428,037.00	1
Total	\$5,917,115.00	15

180+ Bad Debt WO Risk

Company_Name	120+ DBT	#Docs	DBTAge
Hyatt Inc	\$267,541.00	1	127
Quigley-Howe	\$216,266.00	1	125
Wiza-Greenfelder	\$216,142.00	1	123
Johnson-Hermiston	\$84,069.00	1	149
Wiza-Greenfelder		1	39
Total	\$784,018.00	5	

Select Customer ID:

GOODCOMPANY001

Account Alerts:

PraiseAlerts:



Customer Since:

10/28/2015

Payment Terms:

N90

Collection Plan:

PROMPT

Hold Status:

No

Inactive Status:

No

Credit Risk Rating:

01 Low Risk

Credit Checked:

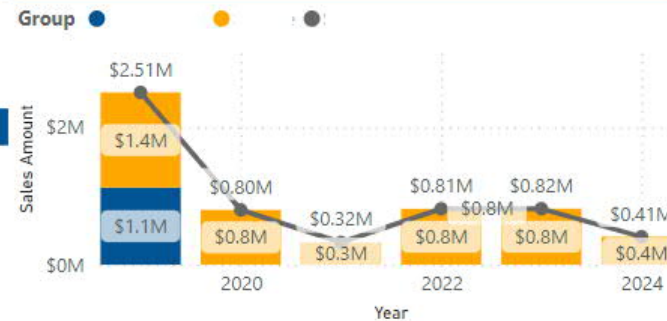
08/13/2018

4

15

3

5 Yr Annual Sales Trend



Department Concentration:

Department

Billed Amt - 5YRS

\$4,542,943

\$1,123,383

Total

\$5,666,326

GOODCOMPANY001

GOOD COMPANY RELATIONSHIP, LLC

Average Days to Pay

Year	AGE	DBT	Trans #
2019	105	15	160
2020	84	-5	158
2021	91	1	101
2022	91	1	155
2023	96	6	141
2024	105	15	99
Total	95	6	814

AR Trial Balance:

AR Bands Age	Open Balance
00-30 Days Balance	\$53,422
31-60 Days Balance	\$47,630
61-90 Days Balance	\$46,981
90+ Days Balance	\$62,601
Total	\$210,634

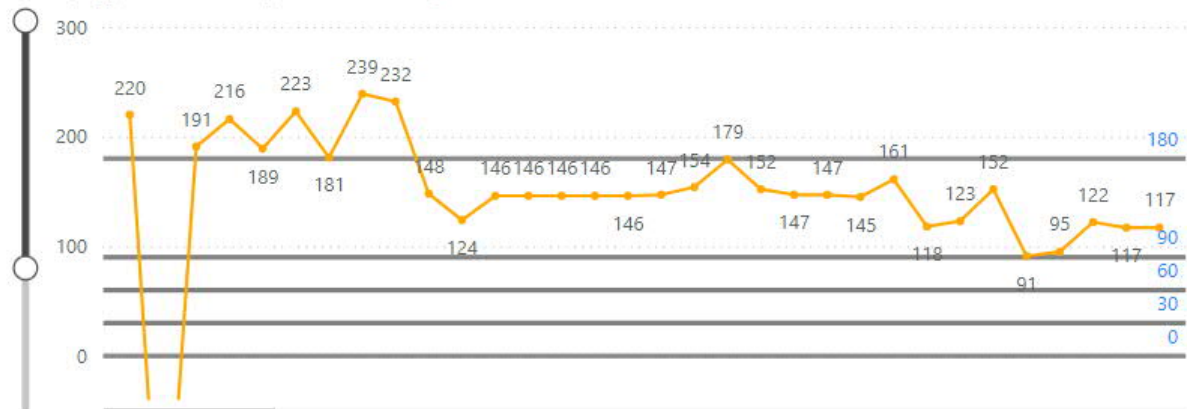
Current

Jobs

Project Billing ID	Job ID	Division	% Done	% Billed	Billed	Balan
--------------------	--------	----------	--------	----------	--------	-------

Customer Payment Trend - Days to Pay Trend - Invoice Date to Final Payment Date

Billing Type ● MEP Billing ● Service Billing



Sales LTD

\$8.26M

Sales LYR

\$809.57K

Sales YTD

\$645.51K

Transactions LTD

1402

Highest Single Trans

\$1.04M

High Balance LTD

\$1.75M

High Balance LYR

\$348.06K

High Balance YTD

\$392.67K

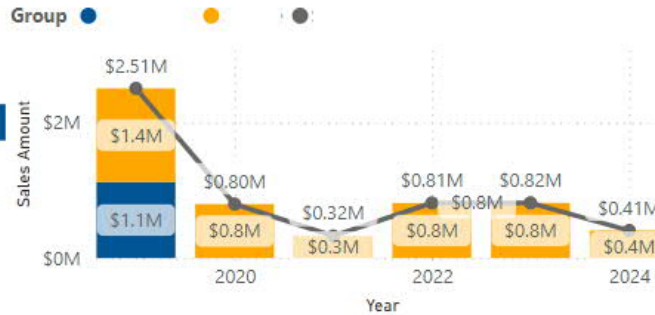
Select Customer ID:
GOODCOMPANY001

Account Alerts: 4
PraiseAlerts: 15
3

Customer Since: 10/28/2015
Payment Terms: N90
Collection Plan: PROMPT
Hold Status: No
Inactive Status: No
Credit Risk Rating: 01 Low Risk
Credit Checked: 08/13/2018

GOODCOMPANY001 GOOD COMPANY RELATIONSHIP, LLC

5 Yr Annual Sales Trend



Department Concentration:

Department	Billed Amt - 5YRS
	\$4,542,943
	\$1,123,383
Total	\$5,666,326

Average Days to Pay

Year	AGE	DBT	Trans #
2019	105	15	160
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Total	95	6	814

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Total	\$210,634

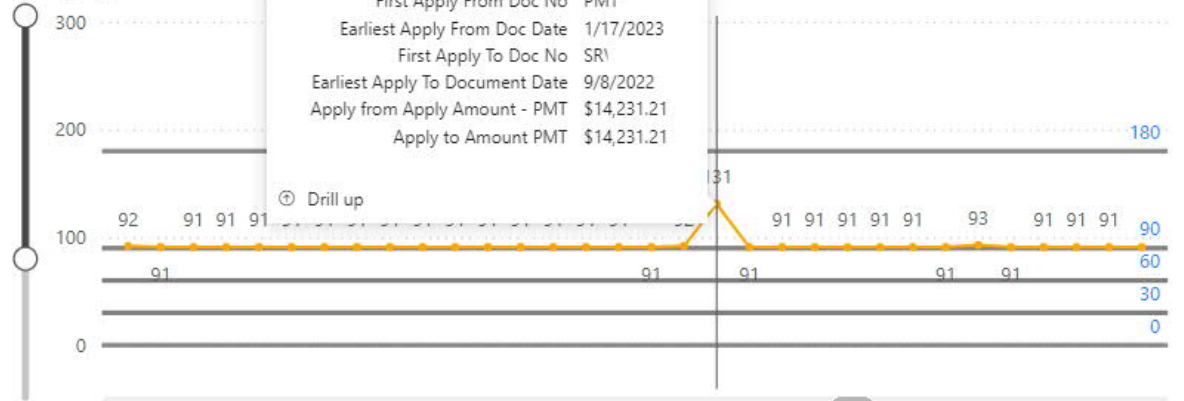
Current

Project	Job ID	Division	% Done	% Billed	Billed	Balan
Billing ID						

Jobs

Customer Payment T

Billing Type



Sales LTD
\$8.26M
Sales LYR
\$809.57K
Sales YTD
\$645.51K
Transactions LTD
1402
Highest Single Trans
\$1.04M
High Balance LTD
\$1.75M
High Balance LYR
\$348.06K
High Balance YTD
\$392.67K

Select Customer ID:

GOODCOMPANY001

Account Alerts:

4

PraiseAlerts:

15

3

Customer Since:

10/28/2015

Payment Terms:

N90

Collection Plan:

PROMPT

Hold Status:

No

Inactive Status:

No

Credit Risk Rating:

01 Low Risk

Credit Checked:

08/13/2018

Sales LTD

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GOODCOMPANY001 GOOD COMPANY RELATIONSHIP, LLC

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Total	95	6	814

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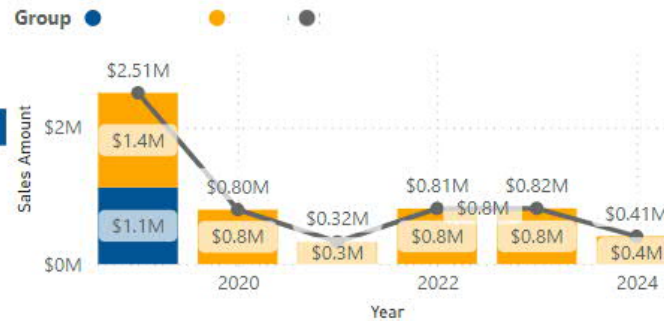
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90+ Days Balance	\$62,601
Total	\$210,634

Current

Jobs

Project Billing ID	Job ID	Division	% Done	% Billed	Billed	Balan
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5 Yr Annual Sales Trend

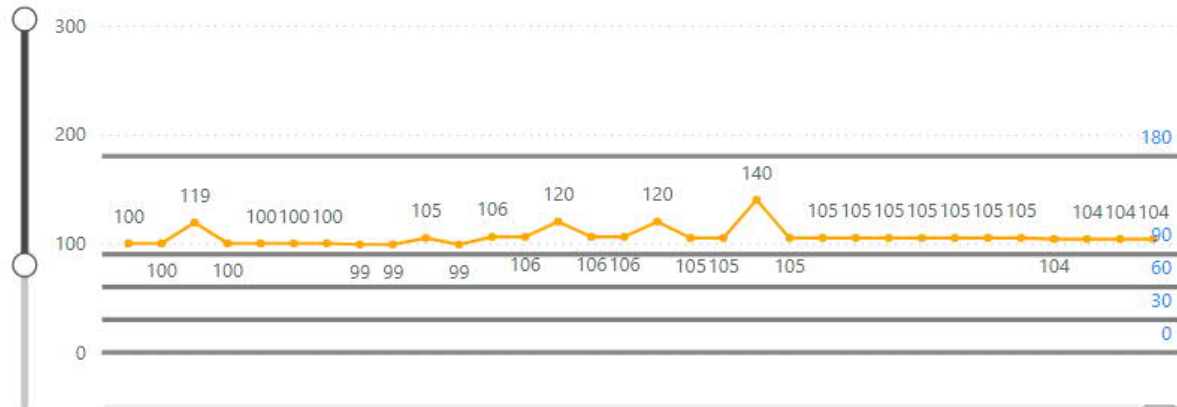


Department Concentration:

Department	Billed Amt - 5YRS
	\$4,542,943
	\$1,123,383
Total	\$5,666,326

Customer Payment Trend - Days to Pay Trend - Invoice Date to Final Payment Date

Billing Type



Monthly Avg Days to Pay

Year	MM YYYY	AGE	DBT
2023	Jan 2023	93	3
2023	Feb 2023	91	1
2023	Mar 2023	91	1
2023	Apr 2023	91	1
2023	May 2023	91	1
2023	Jun 2023	91	1
2023	Jul 2023	88	-2
2023	Aug 2023	91	1
2023	Sep 2023	95	5
2023	Oct 2023	90	0
2023	Dec 2023	114	24
Total		96	6

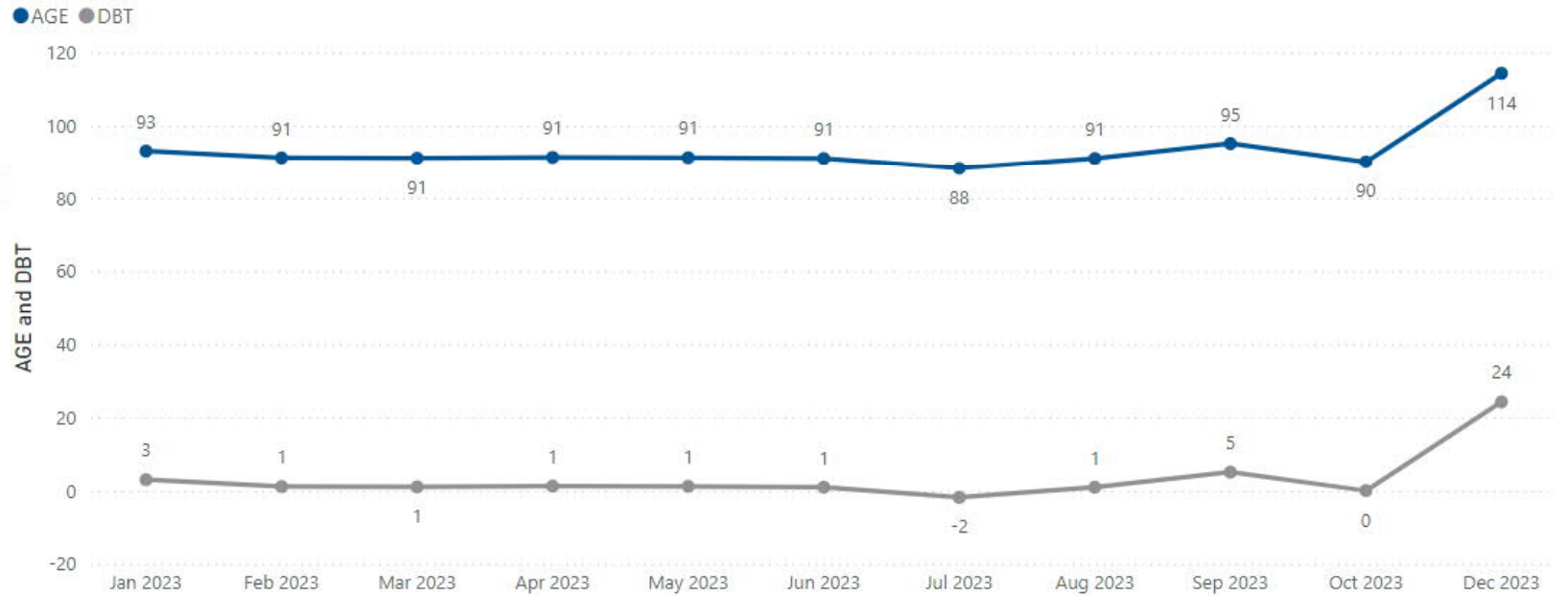
Monthly Sales Volume



Monthly Transaction Volume



Monthly Payment Trend - Average Days to Pay b



Monthly Sales Volume

Year	MM YYYY	Sales Amount	#
2023	Jan 2023	\$31,557.69	10
2023	Feb 2023	\$52,783.39	14
2023	Mar 2023	\$71,873.00	9
2023	Apr 2023	\$31,295.25	8
2023	May 2023	\$90,020.31	8
2023	Jun 2023	\$72,001.31	8
2023	Jul 2023	\$59,200.61	16
2023	Aug 2023	\$67,681.60	15
2023	Sep 2023	\$101,167.92	15
2023	Oct 2023	\$86,289.52	13
2023	Nov 2023	\$77,035.93	10
2023	Dec 2023	\$75,223.37	15
Total		\$816,129.90	141

Monthly Avg Days to Pay

Year	MM YYYY	AGE	DBT
2024	Jan 2024	104	14
2024	Feb 2024	105	15
2024	Mar 2024	103	13
2024	Apr 2024	104	14
2024	May 2024	104	14
2024	Jun 2024	100	10
2024	Jul 2024	109	19
2024	Aug 2024	112	22
Total		105	15

Monthly Sales Volume

Year	MM YYYY	Sales Amount	#
2024	Jan 2024	\$45,354.99	15
2024	Feb 2024	\$86,693.53	15
2024	Mar 2024	\$45,348.85	13
2024	Apr 2024	\$36,009.40	12
2024	May 2024	\$45,521.42	11
2024	Jun 2024	\$46,980.98	9
2024	Jul 2024	\$47,629.79	13
2024	Aug 2024	\$53,422.43	11
Total		\$406,961.39	99

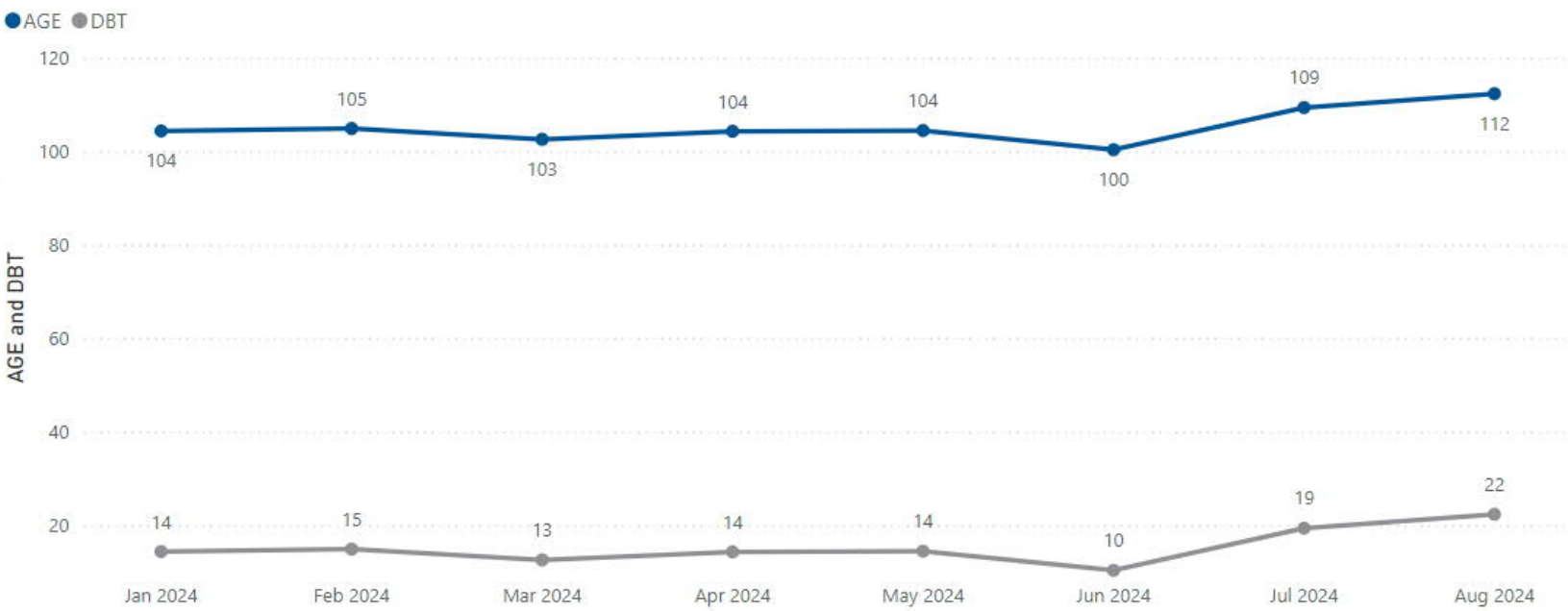
Monthly Sales Volume



Monthly Transaction Volume



Monthly Payment Trend - Average Days to Pay b



GL Posting Date

7/1/2024

7/31/2024

Certificate Scope

Blanket

Customer Type

All

Certificate Type

Exemption

Certificate Claim Type

All

Customer Tax Category

All

Certificate ID

All

Division:

Service

Customer ID

All

Customer ID	# Tax Certs	# Jobs w/o TAX - ALL Dates	# Jobs w/o TAX - Seleted Dates	Tax Amt	Sales Amt

Job Detail

Job No	Customer ID	Address Code	Location Name	Type of Problem	PO No	Batch Number	Tax Amount	Sales Amount
--------	-------------	--------------	---------------	-----------------	-------	--------------	------------	--------------

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Document Detail

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Tax Certificate Detail

Certificate ID	100002
Certificate Scope	Blanket
Certificate Notes	
First Image URL	
Customer ID	
Customer Type	GOV ENTITY
Certificate Claim Type	Government Entity
Certificate Type	Exemption
Limited to Problem Type	SERVICE LABOR
Limited to Job:	ALL
Limited to Locations:	ALL
Certificate State	TX
Certificate Status	Valid
Certificate Date	6/9/2015
Certificate Expiration Date	
Archived	false
Certificate ID	100003
Certificate Scope	Blanket
Certificate Notes	
First Image URL	

TEXAS SALES AND USE TAX EXEMPTION CERTIFICATION

1. The purchaser named above, claims an exemption from payment of sales and use taxes for the purchase of tangible items described below or on the attached order or invoice form.

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

Exemption of taxes is for purchase of or use for the following:

4/1/2019 3/8/2024

All

All 

All 

All

All 

999999998

Job No	Customer ID	Address Code	Location Name	Type of Problem	PO No	Batch Number	Tax Amount	Sales Amount
--------	-------------	--------------	---------------	-----------------	-------	--------------	------------	--------------

Job No	Customer ID	Address Code	Location Name	Type of Problem	PO No	Batch Number	Tax Amount	Sales Amount
--------	-------------	--------------	---------------	-----------------	-------	--------------	------------	--------------


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Job No	Tax Amt	Sales Amt
--------	---------	-----------

Job No	Tax Amt	Sales Amt
--------	---------	-----------

Certificate ID

Certificate ID



THIS CUSTOMER IS

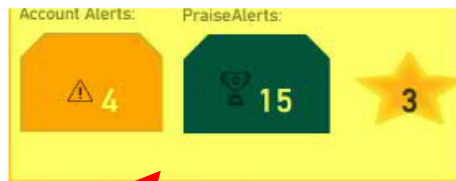
TAXABLE**REQUEST TAX CERT**

IF FOR RESALE OR EXEMPT
(CONTRACTORS, PROPERTY MGRS, MANUFACTURERS,
GOV ENTITIES, NON-PROFITS...)

NO TAX CERTIFICATE FOUND

Select Customer ID:

GOODCOMPANY001

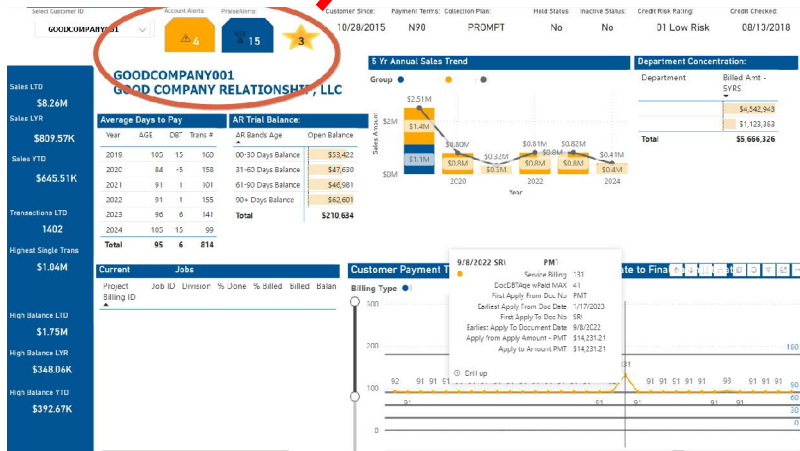


Sales LTD
\$8.26M
Sales LYR

GOODCOMPANY001
GOOD COMPANY RELATIONSHIP, L

Average Days to Pay

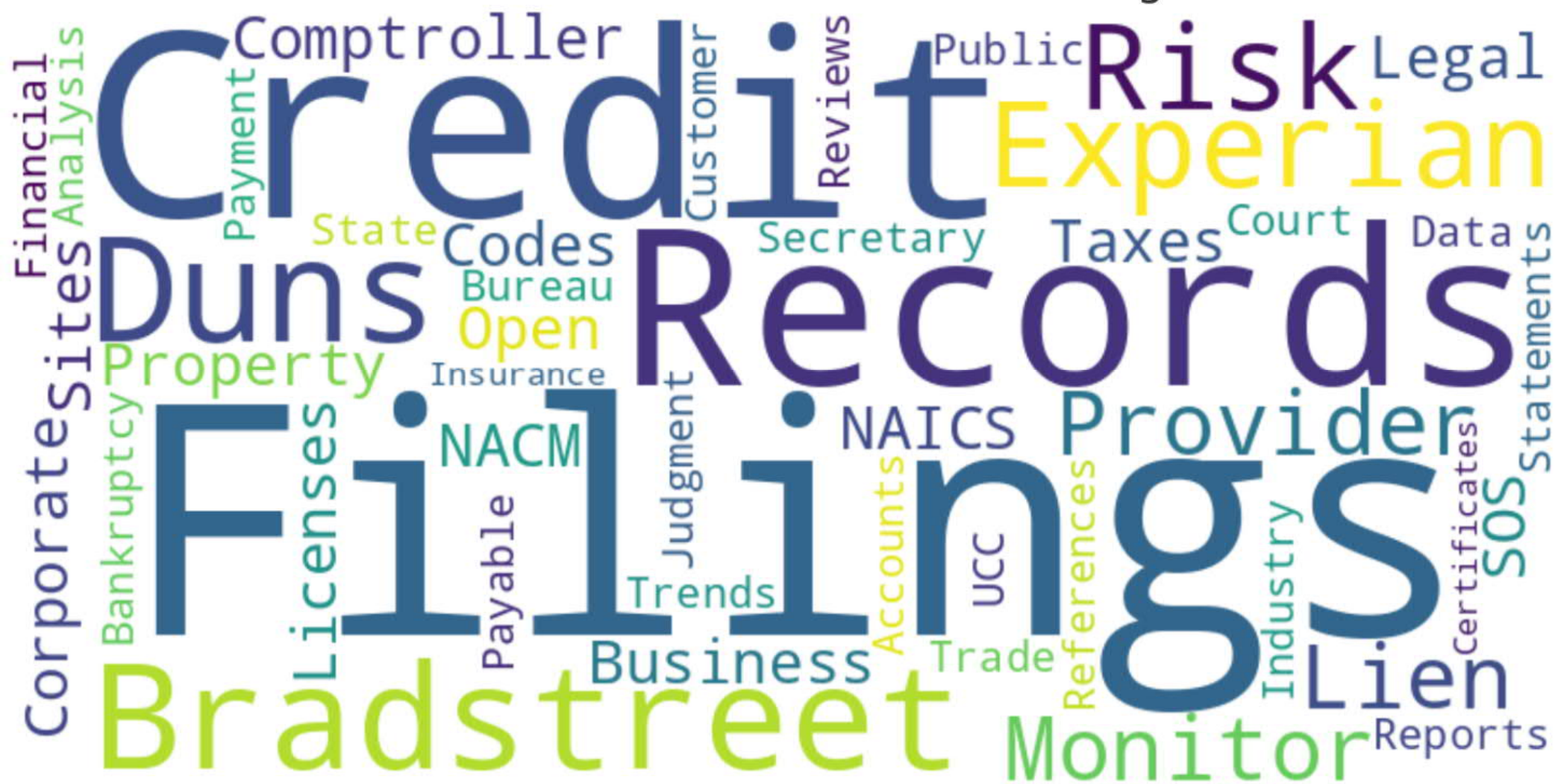
AR Trial Balance:



Alert Total	4
Alerts Possible	17
Alert Bad Debt WO LTD >1	1
# Bad Debt WO's LTD	1
Alert Liens Recorded LTD >1	0
# Lien's Recorded LTD	0
Alert Balance >180 DBT	1
Alert Balance >90 DBT	1
Alert Collection Plan Bankruptcy	0
Alert Collection Plan Blocked	0
Alert Collection Plan Collections	0
Alert Collection Plan HIGH RISK	0
Alert Credit Exposure Limit 2500	0
Alert Payment Terms COD	0
Alert Payment Experience 0	0
Alert On Hold Account	0
Alert New Account < 90 Days	0
Alert Inactive Account	0
Alert New Account, 0 Payments, Balance Over 90	0
Alert Credit Rating 5	0

PraiseAlert Total	15
PraiseAlert Possible	33
PraiseAlert If Alerts are 0	0
PraiseAlert Customer Length >1yr + Active	1
PraiseAlert Customer Length >5yrs + Active	1
PraiseAlert Customer Length >10yrs + Active	0
PraiseAlert Invoice # Transaction > 100	1
PraiseAlert Invoice # Transaction > 500	1
PraiseAlert Invoice # Transaction > 750	1
PraiseAlert Invoice # Transaction > 1000	0
PraiseAlert Credit Risk Low 1	1
PraiseAlert Credit Risk Low 2	0
PraiseAlert Credit Check < 1 Year	0
PraiseAlert Payment Avg DocAge LTD <30	0
PraiseAlert Payment Avg DocAge LTD <60	0
PraiseAlert Payment Avg DBT LTD < 30	1
PraiseAlert Payment Avg DBT LTD < 15	1
PraiseAlert Payment Avg DBT LTD < 5	0
PraiseAlert Sales LTD > \$100k	1
PraiseAlert Sales LTD > \$500k	1
PraiseAlert Sales LTD > \$1M	1
PraiseAlert Sales LTD > \$5M	1
PraiseAlert Sales LTD > \$10M	0
PraiseAlert Sales LTD > \$50M	0
PraiseAlert Sales LTD > \$100M	0
PraiseAlert Sales LTD > \$250M	0
PraiseAlert Sales LTD > \$500M	0
PraiseAlert Highest Single Trans Size > \$100K	1
PraiseAlert Highest Single Trans Size > \$250K	1
PraiseAlert Highest Single Trans Size > \$500K	1
PraiseAlert Highest Single Trans Size > \$1M	0
PraiseAlert Highest Single Trans Size > \$5M	0
PraiseAlert Highest Single Trans Size > \$10M	0

Data Sources for Credit Managers



SPREADSHEET OVERLOAD

DATA OVERLOAD

INFORMATION OVERLOAD

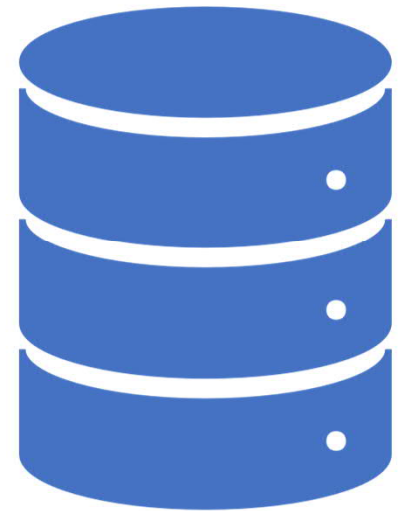
**We pull information from ERPs, Cloud, 3rd Party
Service API or Download, Manual Spreadsheets, we
must bring it all back to together in one place.**

Power BI Empowers YOU

Power BI gives you the ability to customize your analytics to your specific needs.

- No ERP system can handle every customization desire or reporting nuance.
- No IT department can anticipate all the operational needs of business users.
- Needs change constantly over a short period of time.
- Information has an expiration date for usefulness. It needs to be current and fresh to be relevant for best business decisions.
- Report building is time consuming.
- What is not measured is not managed.

That's why Power BI is powerful in the hands of analysts and business users, it bridges the gap between raw data and practical insight.



Data Consolidation and Integration	Integrates data from various sources (ERP, CRM, Excel, databases) into one platform; supports real-time data connections for up-to-date insights.
Advanced Analytics and Reporting	Customizable dashboards and interactive reports allow for deep dives into key metrics like DSO, overdue amounts, and payment behaviors.
Risk Assessment and Monitoring	Analyzes credit risk, tracks payment patterns, and visualizes data to predict defaults or late payments; identifies trends in customer behavior.
Automation and Alerts	Automates report distribution and sets alerts for critical thresholds like exceeding credit limits or high overdue balances.
Collaboration and Sharing	Enables collaborative workspaces for co-creating reports; controls access to sensitive data for authorized personnel only.

Capabilities of Power BI for a Credit Manager

Predictive Analytics	Integrates with Azure Machine Learning for predictive analytics, helping forecast payment behaviors and identify high-risk customers.
Visualization of Financial Data	Visualizes financial statements, debt collection performance, and other financial metrics, aiding in better decision-making.
Scenario Analysis	Conducts "What-If" analysis to simulate various credit scenarios, such as changing credit terms or adjusting credit policies.
Data Auditing & Traceability	Power BI maintains a clear audit trail of all data transformations and reports generated, making it easier to track changes and verify data integrity.
Secure Data Handling	Power BI provides robust security features, such as role-based access controls and data encryption, which help protect sensitive financial data. This is crucial for meeting data privacy regulations and ensuring that only authorized personnel can access sensitive information.

Capabilities of Power BI for a Credit Manager

Prerequisites: System Requirements

Minimum Requirements:

These specifications will allow Power BI to run, but performance may be limited, especially with complex data models or large datasets.

- Processor: 1.6 GHz or faster, dual-core processor.
- RAM: 4 GB (8 GB is preferred for better performance).
- Storage: At least 2 GB of available disk space for installation.
- Operating System: Windows 10, Windows 11, or Windows Server 2019 and above.
- .NET Framework: .NET 4.7.2 or later.
- Display: At least 1440x900 resolution or higher, 16-bit color depth.

Additional Considerations:

- 64-bit Version: Always use the 64-bit version of Power BI Desktop if possible, as it handles larger models and datasets better than the 32-bit version.
- Power BI Premium Features: For specific advanced features like paginated reports or AI functionalities, more robust specs might be beneficial.
- Performance Tuning: Ensure drivers and Power BI Desktop are regularly updated to benefit from performance enhancements.

Recommended Requirements:

These specifications ensure that Power BI runs smoothly, especially when working with complex models, large datasets, or creating visually intensive reports.

- Processor: 2.5 GHz or faster quad-core processor (Intel i5, i7, i9, or AMD Ryzen 5, 7 series).
- RAM: 16 GB (more is preferred for handling large datasets).
- Storage: SSD (Solid State Drive) with at least 10 GB of free space for better performance.
- Graphics: A dedicated graphics card is not mandatory, but having one can improve performance, especially with data visualization.
- Operating System: Latest version of Windows 10 or Windows 11 for compatibility with updates.
- Internet Connection: Reliable internet connection, particularly for Power BI Service and for accessing data sources online.

If you work extensively with large datasets, complex calculations, or visuals, investing in higher specifications (like more RAM or a faster processor) will significantly enhance your experience.

Prerequisites: Licensing

License Type	Cost	Key Features	Ideal For
Power BI Free	Free	<ul style="list-style-type: none">- Create reports and dashboards- Limited to personal use- No sharing or collaboration capabilities	Individuals exploring Power BI on a personal level
Power BI Pro	~\$13 per user/month	<ul style="list-style-type: none">- Share and collaborate on reports- Up to 8 data refreshes per day- Integrates with Microsoft Teams	Teams and organizations needing report sharing
Power BI Premium Per User (PPU)	~\$20 per user/month	<ul style="list-style-type: none">- All Pro features- Advanced AI, paginated reports- Larger data capacity- Incremental refresh	Power users needing advanced analytics features
Power BI Premium (Capacity-Based)	Starting at ~\$4,995/month	<ul style="list-style-type: none">- Organizational capacity- Unlimited sharing without Pro license- Enhanced performance and capacity	Large enterprises needing scalable solutions
Power BI Embedded	Pay-as-you-go	<ul style="list-style-type: none">- Embedding Power BI visuals in apps- Customizable reports- No collaboration features	Developers and ISVs embedding analytics into apps

Usage Levels

	Power BI Tenant Settings	Power BI Desktop	Power BI Workspace	Power BI Service/Dashboard	Power BI App
IT Professional	X	X	X	X	X
Data Wizard		X	X	X	X
Business User				X	X
Decision Maker					X

Many of these usage levels overlap. A Credit Manager may be the Data Wizard, the Managerial Business User and the Decision Maker.

Each one of these services offers immense value to the user.



There is a special relationship between Excel Expert & Power BI User:

- **Excel Origins:** Power BI was born out of Excel. It is composed of Power Query, Power Pivot and Power View for. Power Pivot is the data modeling technology used in Power BI. All Microsoft did was get rid of the Excel wrapping paper.
- **DAX Language Similarity:** Power BI uses Data Analysis Expressions (DAX), which is very similar to Excel formulas. It's just a matter of create a formula for an entire column vs a single field.
- **Familiar Interface:** The interface of Power BI shares similarities with Excel, including ribbon menus and drag-and-drop functionalities, which reduces the learning curve.
- **Seamless Data Import:** Power BI supports importing data directly from Excel files, allowing users to start working with their existing data immediately.
- **Enhanced Data Connectivity:** Power BI expands on Excel's connectivity options, linking to a broader range of data sources, including databases, web services, and cloud-based platforms
- **Interactive Reports and Dashboards:** It extends Excel's capabilities by offering interactive visualizations and dashboards, which provide a more dynamic and engaging way to present data.

Who is Power BI for?

Power BI caters to a wide variety of users, from data analysts and business intelligence professionals to non-technical business users and executives.

For data analysts aka data wizards, Power BI offers advanced data modeling, DAX (Data Analysis Expressions) for complex calculations, and powerful tools for data transformation through Power Query.

IT professionals and developers can use Power BI's APIs for custom integrations, automation, and embedding reports into applications.

For business users and decision-makers, Power BI's intuitive interface allows them to interact with pre-built reports, drill down into data, and gain insights without needing technical expertise. The tool's accessibility on multiple devices—desktop, web, and mobile—ensures that users at all levels can easily access data, make informed decisions, and collaborate effectively across the organization.

Let's start on familiar territory with some spreadsheets!!



AR Portfolio Summary

AR Balance:

\$33.74M

Salesperson Name

All

Region

- ☐ Midwest Region
- ☐ Northeast Region

City

- ☐ Chicago
- ☐ Peoria
- ☐ Scranton
- ☐ Springfield

Trade Description

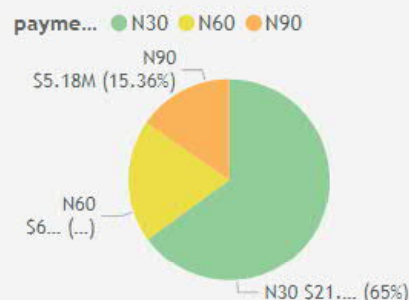
- ☐ Access Control Systems
- ☐ Closed-Circuit Television
- ☐ Cybersecurity
- ☐ HWD Development
- ☐ Monitoring Services
- ☐ Software Development
- ☐ Systems Integration

SafeNetrix

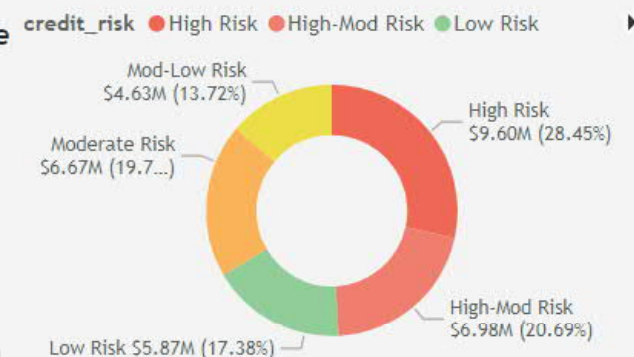
SafeZone Installations

AR Aging Bands - DBTAge	Inv Balance	Doc#	Customers#
00 DBT	\$21,111,213.00	73	70
01-30 DBT	\$8,226,021.00	34	31
30-60 DBT	\$2,342,186.00	10	10
60-90 DBT	\$1,087,674.50	4	4
90+ DBT	\$977,303.00	5	5
Total	\$33,744,397.50	126	117

Payment Terms Open Balance



Credit Risk Open Balance



Top 10 Open Balances

Company_Name	Inv Balance	#Docs
Bartoletti, Kuhlman and Reynolds	\$591,199.00	2
Conroy LLC	\$495,248.00	1
Davis-Kunde	\$970,212.00	3
Gulgowski, Fritsch and Reinger	\$583,163.00	2
Jacobs-Ward	\$634,678.00	2
Jerde-Flatley	\$780,003.00	2
O'Hara Inc	\$496,326.00	1
Walsh-Batz	\$493,666.00	1
Willms Group	\$878,281.00	2
Wiza-Greenfelder	\$613,069.00	2
Total	\$6,535,845.00	18

Top 10 Past Due Balances

Company_Name	Past Due ALL	#Docs
Davis-Kunde	\$970,212.00	3
Willms Group	\$878,281.00	2
Jacobs-Ward	\$634,678.00	2
Wiza-Greenfelder	\$613,069.00	2
O'Hara Inc	\$496,326.00	1
Conroy LLC	\$495,248.00	1
Wehner, Sanford and Durgan	\$488,791.00	1
Nolan-McClure	\$477,848.00	1
Renner-Wilderman	\$434,625.00	1
Trantow-Kris	\$428,037.00	1
Total	\$5,917,115.00	15

180+ Bad Debt WO Risk

Company_Name	120+ DBT	#Docs	DBTAge
Hyatt Inc	\$267,541.00	1	127
Quigley-Howe	\$216,266.00	1	125
Wiza-Greenfelder	\$216,142.00	1	123
Johnson-Hermiston	\$84,069.00	1	149
Wiza-Greenfelder		1	39
Total	\$784,018.00	5	

Resources to Learn





- G.K. CHESTERTON

*“If a thing is worth
doing, it is worth
doing badly.”*

Attend a Free 1 Day Event Workshop: Microsoft Dashboard in a Day



Pragmatic Works DAX Cheat Sheet for Beginners

<p>Dashboard in a Day - UB Technology Innovations, Inc. - United States</p> <p>09/25/2024 10:00 - 18:00 (CDT)</p> <p>Digital English (United... Training</p> <p>Registration and details</p>	<p>Dashboard in a Day - OmniData Insights - United States</p> <p>09/26/2024 08:00 - 16:00 (CDT)</p> <p>Digital English (United... Training</p> <p>Registration and details</p>
<p>Dashboard in a Day - PragmaticWorks - United States</p> <p>09/27/2024 08:00 - 16:00 (CDT)</p> <p>Digital English (United... Training</p> <p>Registration and details</p>	<p>Dashboard in a Day - smart BI - United States</p> <p>10/01/2024 08:00 - 16:00 (CDT)</p> <p>Digital English (United... Training</p> <p>Registration and details</p>

Hands-On, Practical Learning Experience

Rapid Skill Acquisition

Guided Instruction from Experts

Structured Learning Agenda

Real-World Application of Skills

Access to Workshop Materials & Resources

Networking Opportunities

Personalized Feedback & Support

Boosts Confidence with Power BI

Preparation for Advanced Learning

Cost-Effective Training Option

Immediate Insight into Power BI's Capabilities

Exposure to Power BI Service Features



Get started building with Power BI

21 min • Module • 6 Units

[Feedback](#)

Beginner Data Analyst Business Analyst Business User Functional Consultant Power BI

Learn about Power BI, the building blocks and flow of Power BI, and how to create compelling, interactive reports.

This module helps prepare you for [Exam PL-200: Microsoft Power Platform Functional Consultant](#).

Learning objectives

In this module, you'll learn:

- How Power BI services and applications work together.
- Explore how Power BI can make your business more efficient.
- How to create compelling visuals and reports.

[Start >](#) [Add](#)

Prerequisites

None

This module is part of these learning paths

[Create and use analytics reports with Power BI](#)

[Get started with Microsoft data analytics](#)

[Get started with Power BI](#)

700 XP

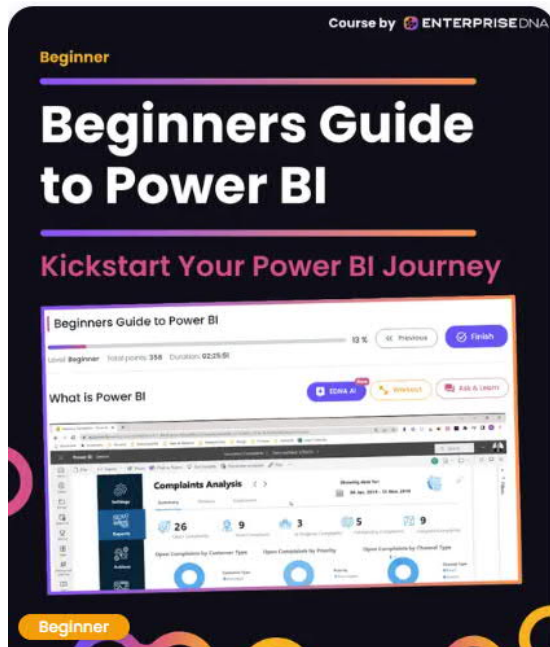
Click to start: [Microsoft Learn](#)

Microsoft Learn

Introducing a new approach to learning

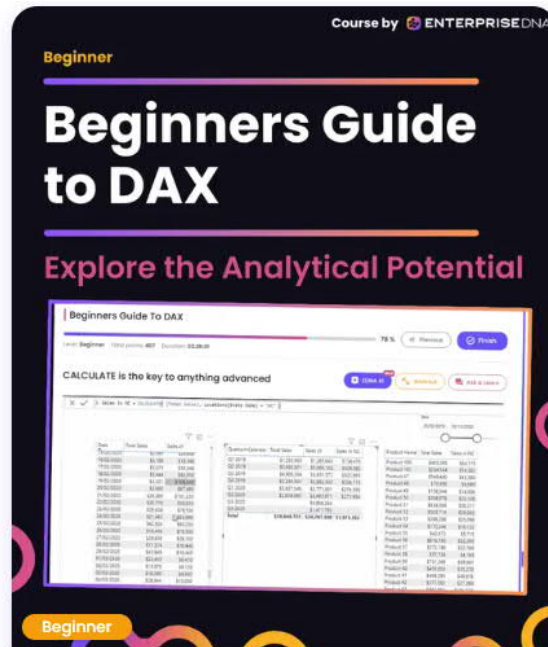


- Free Access to High-Quality Content
- Structured Learning Paths
- Hands-on Labs and Interactive Exercises
- Official and Up-to-Date Content
- Integration with Certifications
- Gamified Learning Experiences (Points, Badges)
- Self-Paced Learning
- Community and Q&A Integration
- Comprehensive Coverage of Power BI Features
- Scenario-Based Learning Modules



Total points: 358 XP

2 hours



Total points: 407 XP

3 hours

FREE COURSE - Ultimate Beginners Guide To Power BI -

<http://portal.enterprisedna.co/p/ultimate-beginners-guide-to-power-bi>

FREE COURSE - Ultimate Beginners Guide To DAX -

<http://portal.enterprisedna.co/p/ultimate-beginners-guide-to-dax>

FREE - 60 Page DAX Reference Guide Download -

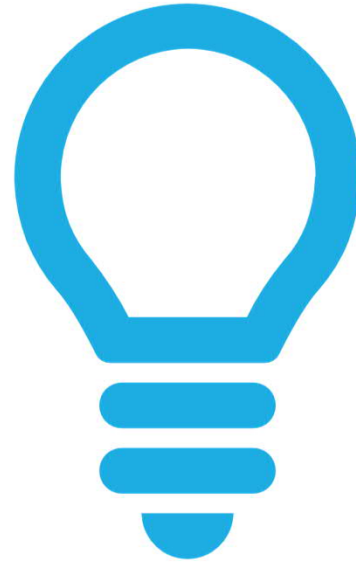
<https://enterprisedna.co/dax-formula-reference-guide-download>

Click to start:  ENTERPRISE DNA



Sam McKay, CFA

- Some Free Courses else Paid Subscription
- Expert-Led Training & Courses
- Focus on Real-World Scenarios & Problem-Solving
 - Finance Focused
- Comprehensive Course Catalog
- Access to Learning Summits & Workshops
- Extensive Resource Library
 - Power BI .pbix file downloads
- Customized Learning Paths
- Innovative Data Challenges & Projects
- Supportive Community Forum
- Access to Power BI Showcases
- Focus on Advanced Analytics & AI Integration
- On-Demand, Self-Paced Learning
- Gamified Learning Experience (Points & Badges)
- Certification Programs
- Emphasis on Visualization & Design



Tips & Tricks to Remember

Power Query Tips

1. Design with the Star Schema Data Model in Mind and Normalize Data Where Possible
2. Ensure Data Types Are Correct
3. Use Web data type for Excel Files (Use File, Infor, Copy Path and delete after .xlsx)
4. Reference Source Files in a Staging File Instead of Editing Source Files Directly
5. Organize Your Queries into Groups for Easy Navigation
6. Use Prefixes to Clearly Identify Query Types (src...stg...)
7. Disable Loading for Source and Staging Queries
8. Use Only the Necessary Data by Filtering Rows and Removing Columns
9. Rename Query Steps for Clarity
10. Add Annotations to Explain Key Steps
11. Be Careful When Deleting Steps

Queries [16]

src_Excel_DimRegionsTable

src_Excel_DimCustomerTable

src_ERP_DimEmployeeTable

src_DW_FactBillingTransactions

src_DW_FactSalesOrderTable

StagingTables [4]

stg_FactBillingTrans

stg_DimCustomer

stg_FactSales

stg_DimEmployee

DataModel [6]

Customers

AR Trial Balance

Dates

Sales

Salesperson

Regions

Other Queries [1]

AR_Measures

fx

= Table.TransformColumnTypes("#DocAge - AR Aging Bands",{{"AR Aging Bands - DBTAge", type text}, {"AR Aging Bands - DocAge", type text}})

	id	CustomerID	CustomerName	OrderID	SalesRepID	Division	TermsID	InvoiceNo
1	1	6402978	Quigley-Howe	1002460	1783	ACS-SPR	N90	INV100246000
2	60	1043931	Purdy, Ortiz and Rodriguez	1002912	4866	ACS-CHI	N90	INV100291200
3	67	8202704	Crooks-Price	1002919	4207	CCTV-SCR	N60	INV100291900
4	114	8630898	Feeney-Gerhold	1002966	4207	CYB-SCR	N60	INV100296600
5	112	5703455	Tremblay LLC	1002964	2459	CYB-CHI	N30	INV100296400
6	66	1165774	Jacobi-Zulauf	1002918	4860	SYSI-SCR	DR	INV100291800
7	113	4533749	Dibbert-Hills	1002965	4860	SWD-SCR	N60	INV100296500
8	2	3262115	Johnson-Hermiston	1002474	2676	CYB-SCR	N60	INV100247400
9	25	6803991	Smitham, Koch and Conn	1002869	2676	CCTV-SCR	N30	INV100286900
10	7	9203958	Sawayn-Schowalter	1002744	1114	SYSI-SCR	DR	INV100274400
11	3	6332230	Veum, Schmidt and Glover	1002589	4818	MON-CHI	N60	INV100258900
12	33	1752145	Baumbach-Wilkinson	1002884	4818	ACS-CHI	N90	INV100288400
13	4	1394441	Hyatt Inc	1002652	1423	SWD-CHI	DR	INV100265200
14	97	6345787	Friesen, Pfannerstill and McLaughlin	1002949	1423	MON-CHI	N30	INV100294900
15	34	4949980	Conroy LLC	1002885	2709	CCTV-CHI	N30	INV100288500
16	104	9068059	Jenkins and Sons	1002956	4890	SYSI-SCR	N60	INV100295600
17	5	8418685	Wiza-Greenfelder	1002666	2182	CCTV-SPR	DR	INV100266600
18	30	8418685	Wiza-Greenfelder	1002880	2182	CCTV-SPR	DR	INV100288000
19	120	8054195	Abernathy, Kuhlman and Wehner	1002972	4490	ACS-CHI	N60	INV100297200
20	6	9330373	Jerde-Flatley	1002684	2310	SYSI-SPR	N30	INV100268400
21	98	9330373	Jerde-Flatley	1002950	2310	SYSI-SPR	N30	INV100295000
22	26	8310136	Walter Inc	1002871	1019	MON-PEO	N30	INV100287100
23	28	1032609	VonRueden Group	1002877	1051	MON-PEO	DR	INV100287700
24	8	8380882	Boehm-Jaskolski	1002767	1288	MON-CHI	N30	INV100276700
25	103	1116537	Bins, Schamberger and Green	1002955	2748	CYB-SPR	N30	INV100295500
26	9	5855162	Graham-Collins	1002769	1433	ACS-PEO	N60	INV100276900
27	121	1597766	Walsh-Batz	1002973	1433	MON-PEO	N60	INV100297300
28	17	8904971	Bartoletti, Kuhlman and Reynolds	1002825	1470	CYB-SPR	N90	INV100282500
29	99	8904971	Bartoletti, Kuhlman and Reynolds	1002951	1470	CYB-SPR	N90	INV100295100
30	101	4328675	Sawayn-Pfannerstill	1002953	1470	SYSI-SPR	N30	INV100295300
31	40	1129615	Roberts LLC	1002892	1618	SWD-SPR	N90	INV100289200
32	10	4928941	Hand, Bruen and Fay	1002780	4634	MON-CHI	N90	INV100278000
33	44	2573111	Hodkiewicz-Maggio	1002896	4634	CCTV-CHI	DR	INV100289600
34	29	7103507	Rodriguez Group	1002878	2237	SYSI-SPR	DR	INV100287800
35	78	1610727	Bailey-Pfannerstill	1002930	2862	SWD-CHI	DR	INV100293000
36	96	1067376	Cartwright LLC	1002948	2862	CCTV-CHI	N60	INV100294800
37	27	1368240	Rau-Howell	1002876	1130	ACS-SCR	N60	INV100287600
38	25	6906693	Gallagher-Bachman	1002900	1130	CYB-SCR	N60	INV100290000

Query Settings

PROPERTIES

Name

AR Trial Balance

All Properties

APPLIED STEPS

Source

Today's Date

Changed Type

DocAge

DBTAge

Changed Type1

DBTAge- AR Aging Bands

DocAge - AR Aging Bands

Changed Type2

17 COLUMNS 126 ROWS

Column profiling based on top 1000 rows

PREVIEW ROWS 10/100 AT 9:54 PM

Table View | PowerPivot Tips

Index	Date	Day	Day Name	Month Number	Month Name	Quarter Number	Quarter Year	Short Year	Year	YYYY-MM	YYYY-MM-DD
182	2/1/2015	1	Wed	2	Jan	2	15Q01	15	2015	2015-Jan	20150101
183	2/2/2015	2	Thu	2	Jan	2	15Q01	15	2015	2015-Jan	20150102
184	2/3/2015	3	Fri	2	Jan	2	15Q01	15	2015	2015-Jan	20150103
185	2/4/2015	4	Sat	2	Jan	2	15Q01	15	2015	2015-Jan	20150104
186	2/5/2015	5	Sun	2	Jan	2	15Q01	15	2015	2015-Jan	20150105
187	2/6/2015	6	Mon	2	Jan	2	15Q01	15	2015	2015-Jan	20150106
188	2/7/2015	7	Tue	2	Jan	2	15Q01	15	2015	2015-Jan	20150107
189	2/8/2015	8	Wed	2	Jan	2	15Q01	15	2015	2015-Jan	20150108
190	2/9/2015	9	Thu	2	Jan	2	15Q01	15	2015	2015-Jan	20150109
191	2/10/2015	10	Fri	2	Jan	2	15Q01	15	2015	2015-Jan	20150110
192	2/11/2015	11	Sat	2	Jan	2	15Q01	15	2015	2015-Jan	20150111
193	2/12/2015	12	Sun	2	Jan	2	15Q01	15	2015	2015-Jan	20150112
194	2/13/2015	13	Mon	2	Jan	2	15Q01	15	2015	2015-Jan	20150113
195	2/14/2015	14	Tue	2	Jan	2	15Q01	15	2015	2015-Jan	20150114
196	2/15/2015	15	Wed	2	Jan	2	15Q01	15	2015	2015-Jan	20150115
197	2/16/2015	16	Thu	2	Jan	2	15Q01	15	2015	2015-Jan	20150116
198	2/17/2015	17	Fri	2	Jan	2	15Q01	15	2015	2015-Jan	20150117
199	2/18/2015	18	Sat	2	Jan	2	15Q01	15	2015	2015-Jan	20150118
200	2/19/2015	19	Sun	2	Jan	2	15Q01	15	2015	2015-Jan	20150119
201	2/20/2015	20	Mon	2	Jan	2	15Q01	15	2015	2015-Jan	20150120
202	2/21/2015	21	Tue	2	Jan	2	15Q01	15	2015	2015-Jan	20150121
203	2/22/2015	22	Wed	2	Jan	2	15Q01	15	2015	2015-Jan	20150122
204	2/23/2015	23	Thu	2	Jan	2	15Q01	15	2015	2015-Jan	20150123
205	2/24/2015	24	Fri	2	Jan	2	15Q01	15	2015	2015-Jan	20150124
206	2/25/2015	25	Sat	2	Jan	2	15Q01	15	2015	2015-Jan	20150125
207	2/26/2015	26	Sun	2	Jan	2	15Q01	15	2015	2015-Jan	20150126
208	2/27/2015	27	Mon	2	Jan	2	15Q01	15	2015	2015-Jan	20150127
209	2/28/2015	28	Tue	2	Jan	2	15Q01	15	2015	2015-Jan	20150128
210	2/29/2015	29	Wed	2	Jan	2	15Q01	15	2015	2015-Jan	20150129
211	3/30/2015	30	Thu	3	Mar	2	15Q01	15	2015	2015-Mar	20150130
212	3/31/2015	31	Fri	3	Mar	2	15Q01	15	2015	2015-Mar	20150131
448	7/1/2016	1	Fri	7	Jul	3	16Q03	16	2016	2016-Jul	20160701
449	7/2/2016	2	Sat	7	Jul	3	16Q03	16	2016	2016-Jul	20160702
450	7/3/2016	3	Sun	7	Jul	3	16Q03	16	2016	2016-Jul	20160703
451	7/4/2016	4	Mon	7	Jul	3	16Q03	16	2016	2016-Jul	20160704
452	7/5/2016	5	Tue	7	Jul	3	16Q03	16	2016	2016-Jul	20160705
453	7/6/2016	6	Wed	7	Jul	3	16Q03	16	2016	2016-Jul	20160706
454	7/7/2016	7	Thu	7	Jul	3	16Q03	16	2016	2016-Jul	20160707

- Reformat all dates to “short date”
- Format all index keys, id’s, zips as “Don’t summarize” so they are treated as text
- Make sure all Amounts are “Currenty” and Decimal point is 2 for rounding purposes
- Make your Date Table is marked as a date Table under Table Tools
- Use Sort by Column to Sort your Date Table Month’s name by month number so they appear in correct order on visuals.
- Hide any unnecessary columns like key columns and id’s, implicit measures.

FileHomeHelpExternal toolsTable toolsColumn tools

NameDate

Format7/14/2001 (Short ...)

SummarizationDon't summarize

Data typeDate

% %

Auto

Data categoryUncategorized

Sort by column

Data groups

Manage relationships

New column

Calculations

StructureFormattingProperties

Table: Dates (3,553 rows) Column: Date (3,553 distinct values)

Index	Date	Day	Day Name	Month Number	Month Name	Quarter Number	Quarter Year	Short Year	Year	YYYY-MMM	YYYY-MMM Sort
182	7/1/2015	1	Wed	7	Jul	3	15Q03	15	2015	2015-Jul	201507
183	7/2/2015	2	Thu	7	Jul	3	15Q03	15	2015	2015-Jul	201507
184	7/3/2015	3	Fri	7	Jul	3	15Q03	15	2015	2015-Jul	201507
185	7/4/2015	4	Sat	7	Jul	3	15Q03	15	2015	2015-Jul	201507
186	7/5/2015	5	Sun	7	Jul	3	15Q03	15	2015	2015-Jul	201507
187	7/6/2015	6	Mon	7	Jul	3	15Q03	15	2015	2015-Jul	201507
188	7/7/2015	7	Tue	7	Jul	3	15Q03	15	2015	2015-Jul	201507
189	7/8/2015	8	Wed	7	Jul	3	15Q03	15	2015	2015-Jul	201507
190	7/9/2015	9	Thu	7	Jul	3	15Q03	15	2015	2015-Jul	201507
191	7/10/2015	10	Fri	7	Jul	3	15Q03	15	2015	2015-Jul	201507
192	7/11/2015	11	Sat	7	Jul	3	15Q03	15	2015	2015-Jul	201507
193	7/12/2015	12	Sun	7	Jul	3	15Q03	15	2015	2015-Jul	201507
194	7/13/2015	13	Mon	7	Jul	3	15Q03	15	2015	2015-Jul	201507
195	7/14/2015	14	Tue	7	Jul	3	15Q03	15	2015	2015-Jul	201507
196	7/15/2015	15	Wed	7	Jul	3	15Q03	15	2015	2015-Jul	201507
197	7/16/2015	16	Thu	7	Jul	3	15Q03	15	2015	2015-Jul	201507
198	7/17/2015	17	Fri	7	Jul	3	15Q03	15	2015	2015-Jul	201507
199	7/18/2015	18	Sat	7	Jul	3	15Q03	15	2015	2015-Jul	201507
200	7/19/2015	19	Sun	7	Jul	3	15Q03	15	2015	2015-Jul	201507
201	7/20/2015	20	Mon	7	Jul	3	15Q03	15	2015	2015-Jul	201507
202	7/21/2015	21	Tue	7	Jul	3	15Q03	15	2015	2015-Jul	201507
203	7/22/2015	22	Wed	7	Jul	3	15Q03	15	2015	2015-Jul	201507
204	7/23/2015	23	Thu	7	Jul	3	15Q03	15	2015	2015-Jul	201507
205	7/24/2015	24	Fri	7	Jul	3	15Q03	15	2015	2015-Jul	201507
206	7/25/2015	25	Sat	7	Jul	3	15Q03	15	2015	2015-Jul	201507
207	7/26/2015	26	Sun	7	Jul	3	15Q03	15	2015	2015-Jul	201507
208	7/27/2015	27	Mon	7	Jul	3	15Q03	15	2015	2015-Jul	201507
209	7/28/2015	28	Tue	7	Jul	3	15Q03	15	2015	2015-Jul	201507
210	7/29/2015	29	Wed	7	Jul	3	15Q03	15	2015	2015-Jul	201507
211	7/30/2015	30	Thu	7	Jul	3	15Q03	15	2015	2015-Jul	201507
212	7/31/2015	31	Fri	7	Jul	3	15Q03	15	2015	2015-Jul	201507
548	7/1/2016	1	Fri	7	Jul	3	16Q03	16	2016	2016-Jul	201507
549	7/2/2016	2	Sat	7	Jul	3	16Q03	16	2016	2016-Jul	201507
550	7/3/2016	3	Sun	7	Jul	3	16Q03	16	2016	2016-Jul	201507
551	7/4/2016	4	Mon	7	Jul	3	16Q03	16	2016	2016-Jul	201507
552	7/5/2016	5	Tue	7	Jul	3	16Q03	16	2016	2016-Jul	201507
553	7/6/2016	6	Wed	7	Jul	3	16Q03	16	2016	2016-Jul	201507
554	7/7/2016	7	Thu	7	Jul	3	16Q03	16	2016	2016-Jul	201507

Data

Search

120+ DBT

31-60 DBT

61-90 DBT

91+ DBT

Customer Count

Document Count

Inv Amount

Inv Balance

Past Due ALL

AR Trial Balance

AR Aging Bands - DBTAge

AR Aging Bands - DocAge

CustomerID

CustomerName

DBTAge

Division

DocAge

Due Date

id

Invoice Date

Invoice_Amount

Invoice_Balance

InvoiceNo

OrderID

SalesRepID

TermsID

Today's Date

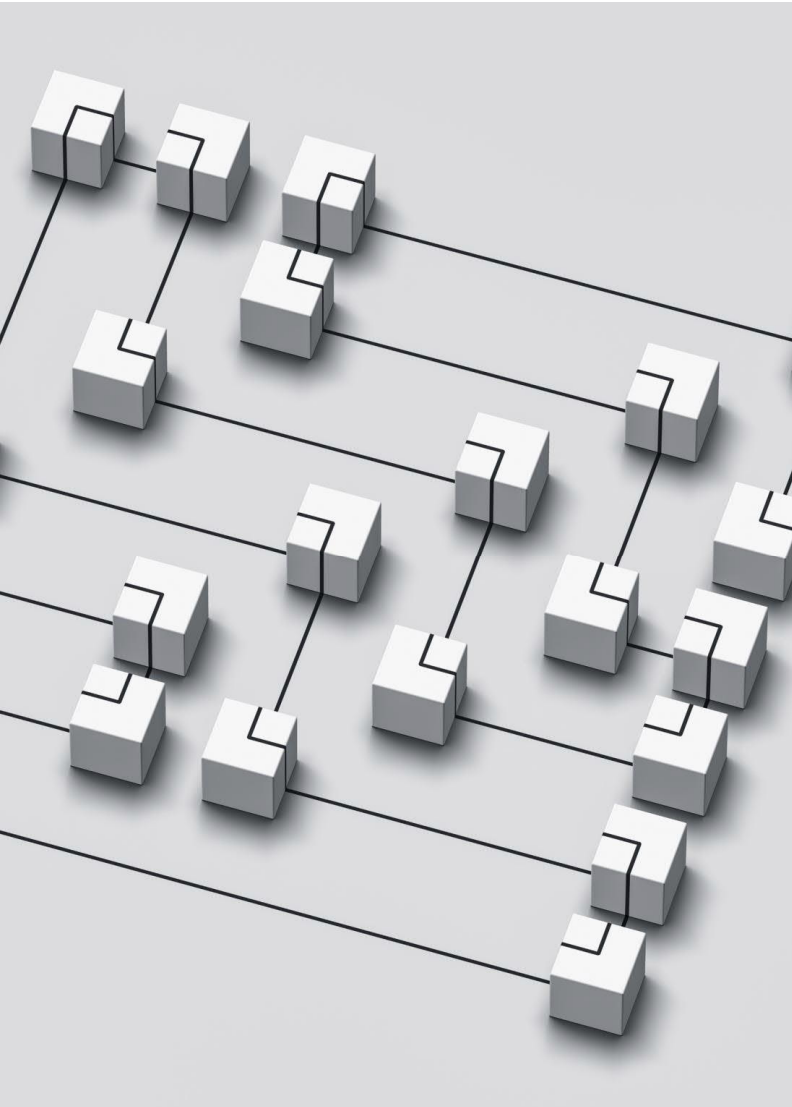
Customers

Dates

Date

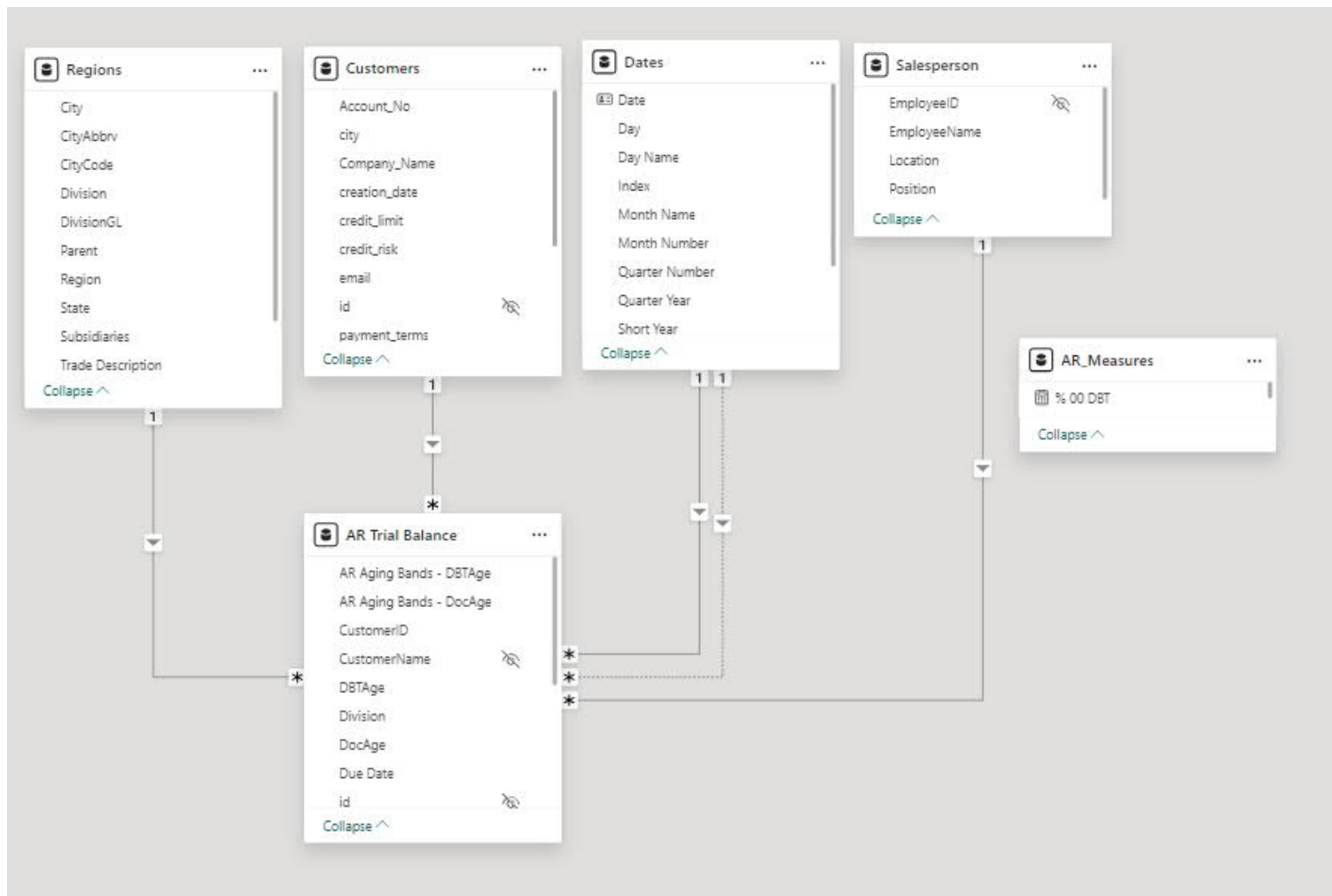
Day

Day Name



Data Modeling Tips

1. Understand and Use the Star Schema Design, 1 Fact Table, Multiple Dimension Tables best
2. Avoid Snowflake Schema
3. Always create a dedicated Date table with no missing dates and mark it as the official date table
4. Use surrogate keys (id, index, system generated) for dimension tables instead of business keys based on application data (e.g., customer names).
5. Establish Correct Relationships and Cardinality (Many to one (*:1))
6. Reduce Columns and Rows Where Possible
7. Avoid Using Bi-Directional Relationships
8. Name Tables, Columns, and Measures Clearly
9. Keep the same granularity of data
10. Keep the Fact Tables thin



Attribute	Dimension Table	Fact Table
Purpose	Contains descriptive information attributes (e.g., Product Name, Customer Region)	Contains quantitative data (measures) and foreign keys (e.g., Sales Amount, ProductID).
Data Type	Contains textual or categorical data such as names, categories, or descriptions.	Contains numeric data, primarily used for aggregations like sums or averages.
Primary Key	Has a primary key that uniquely identifies each row (e.g., ProductID, CustomerID).	Contains foreign keys that link to the primary keys of dimension tables.
Granularity	Lower granularity; represents the "who," "what," "where," "when," and "how" of data.	Higher granularity; represents individual transactions or events.
Data Volume	Typically smaller in volume; fewer rows compared to fact tables.	Typically larger in volume; can have millions of rows due to transactional data.
Relationships	Acts as a lookup table that connects to one or more fact tables.	Connected to multiple dimension tables via foreign key relationships.
Usage in Reports	Used to filter, slice, and categorize data in reports and dashboards.	Used to perform calculations, aggregations, and derive key metrics.
Aggregation	Rarely aggregated; primarily used for slicing data in aggregations.	Frequently aggregated to provide meaningful insights (e.g., total sales).
Changes Over Time	Slowly Changing Dimensions (SCD) can track changes in data over time.	Generally not used to track changes directly; instead reflects real-time or historical transactional data.



DAX TIPS

1. Use Explicit Measures for Aggregations (SUM, DIVIDE, AVERAGE, MIN, MAX)
2. Organize Measures in a Dedicated Measure Table for Easy Navigation
3. Start with Basic Measures (SUM, DISTINCTCOUNT, DIVIDE)
4. Familiarize Yourself with Filter Functions Next (CALCULATE, FILTER, RELATED)
5. Utilize Cheat Sheets and Online Resources
6. Use Comments in DAX Code (//) for notes and documentation
7. Format DAX Measures with Line Breaks and Indenting for Readability when Debugging (CTRL+SHIFT+ENTER)
8. Pay Attention to Context: Row vs. Filter Context
9. Test Your Measures with Different Scenarios
10. Learn to Use Time Intelligence Functions

An abstract geometric pattern on the left side of the slide. It features a light gray grid with various colored squares (black, blue, purple, orange, green, pink) and lines of different thicknesses. Some squares are solid, while others are outlined. The pattern is dense and layered, creating a sense of depth and complexity.

Data Visualizations Tips

1. Understand Your Audience
2. Choose the Right Chart Types, Bars, Trends or Pies
3. Keep it Simple & Avoid Clutter
4. Use Consistent Meaningful Color Schemes (Colors Communicate)
5. Use Labels and Titles Effectively
6. Group Related Items and Use White Space to Improve Readability
7. Maintain a Logical Flow and Layout
8. Highlight Key Data Points
9. Incorporate Visual Hierarchy (Size, Space to prioritize important info)
10. Leverage Tooltips & Drillthrough for details
11. Study Data Visualization Techniques (Google: Data Visualization Cheat Sheet to start) [Coolinfographics.com/dataviz.guides](https://coolinfographics.com/dataviz.guides)



Power BI Service/Dashboards & Apps

1. Organize Workspaces Wisely for Reports, DataSets by Project
2. Set Appropriate Permissions & Access Levels (Admin, Member, Contributor, Viewer)
3. Schedule Data Refreshes Appropriately
4. Leverage Power BI Apps for Sharing Reports
5. Monitor Performance with Usage Metrics
6. Set Up Data Alerts for Real-Time Monitoring
7. Set Up Subscriptions for Automated Report Delivery
8. Use Row-Level Security (RLS) to Restrict Data Access
9. Take Advantage of Power BI's Q&A Feature
10. Pin Important Reports and Dashboards

Coming up Next: Power Query Proficiency

Presented by: Rebekyah Brewer
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