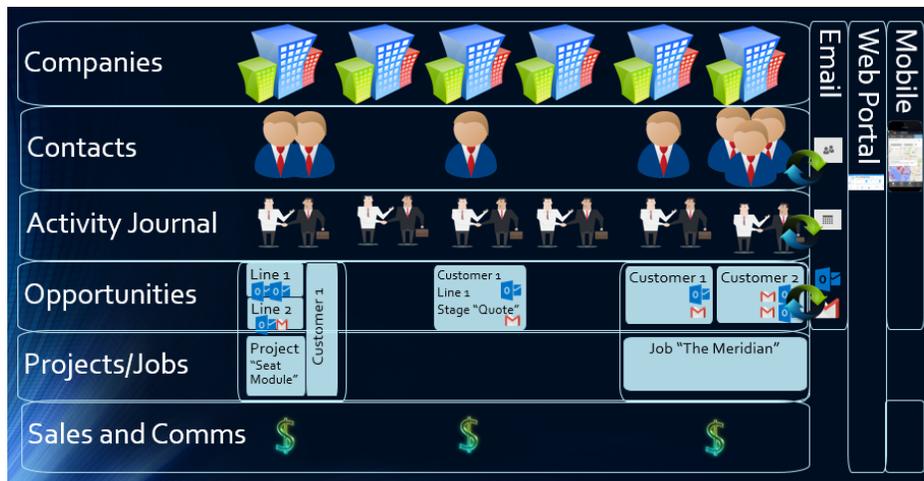


How to Install and Connect Power Bi to Repfabric



repfabric®

Connecting the threads of multi-line selling



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Need help?

Email:

Support@repfabric.com

Or call

(844) 737-7253

For videos and more tutorials, log on to:
<https://support.repfabric.com>





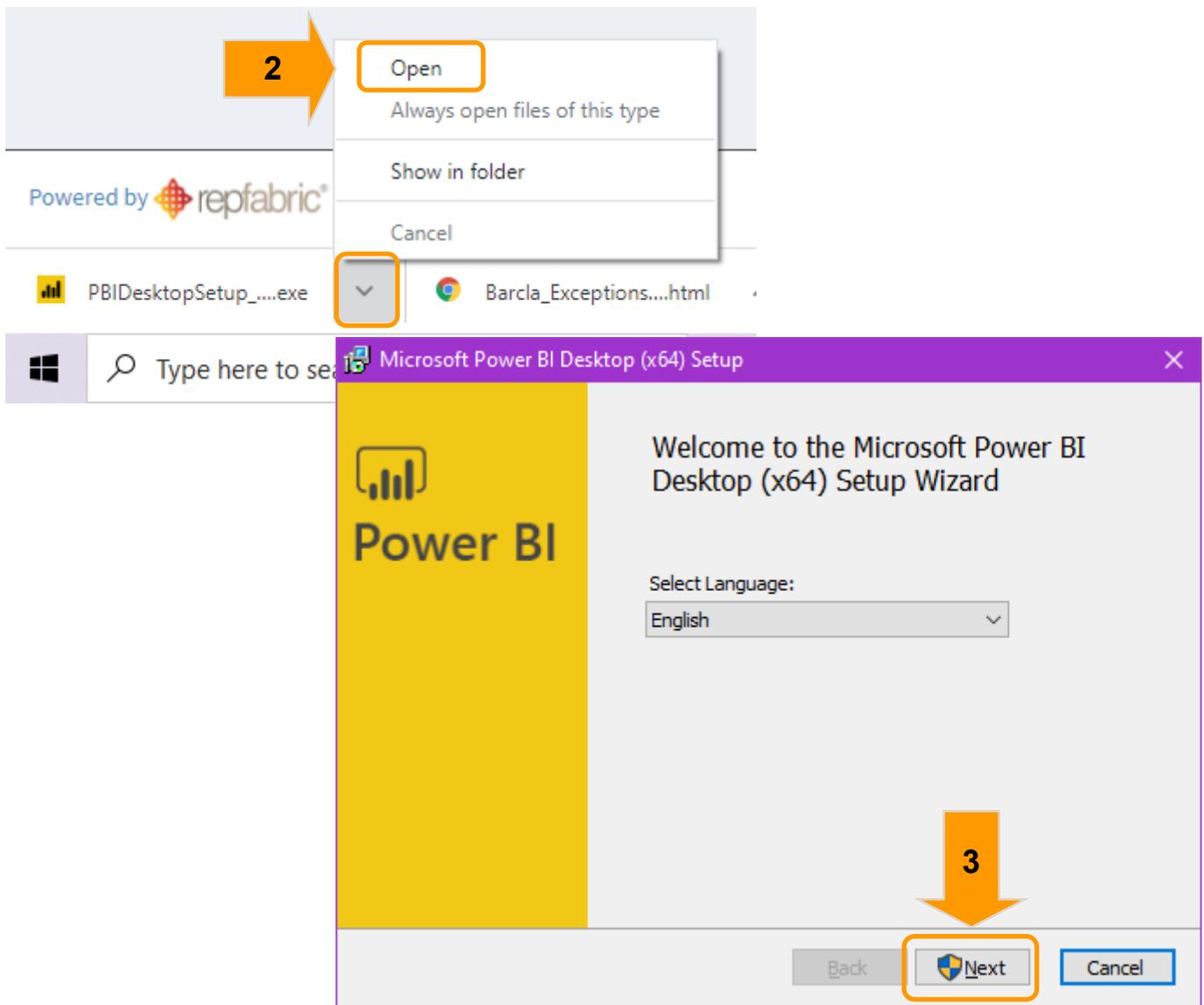
How to Install and Connect Power BI to Repfabric

Microsoft provides a dashboard visualization tool called Power BI in your Office 365 subscription. It is a free download for any Windows device. Mac support is provided using the "Parallels" Windows emulator feature with your Mac's operating system (iOX).

The purpose of this tutorial is to provide the instructions to connect PowerBI's queries to your company's Repfabric system. You will need:

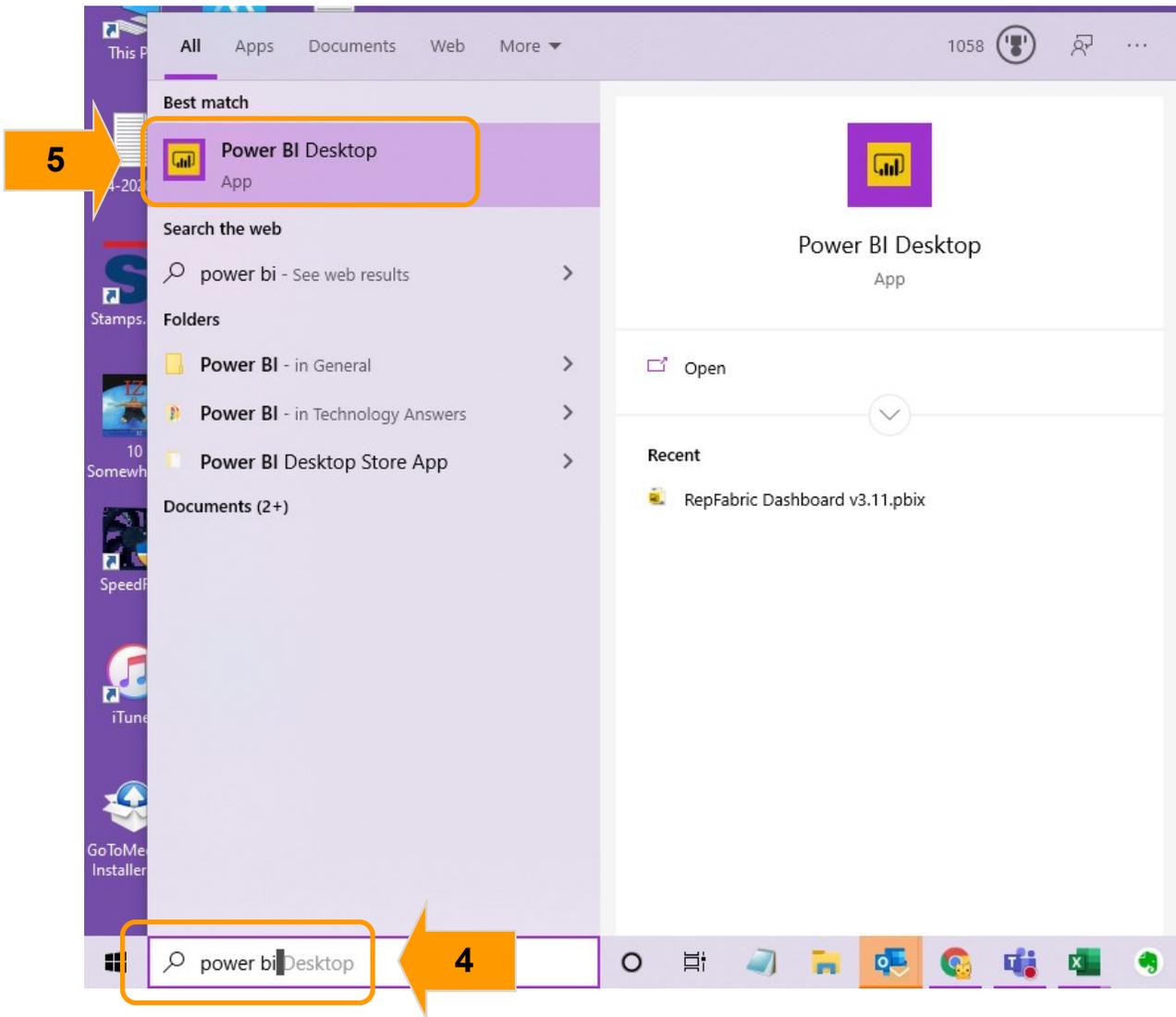
- Microsoft PowerBI Desktop installed
- Your Repfabric User Name and Password
- The current PowerBI Template provided by Repfabric on our support site here:
 1. Click here to [download Power BI](#).
 2. Open the file.
 3. Follow the prompts.

This image shows opening the Power BI download.



4. Search your computer for Power BI.
5. Open the app.

This image shows your Windows 10 search for Power BI.





6. Click “Already have a Power BI acct? Sign in.”
7. Close the sign in window - you don’t need to sign in to open a Power BI file.

This image shows where you will go to skip the email registration.

Welcome to Power BI Desktop

Where can we send you the latest tips and tricks for Power BI?

First Name *

Last Name *

Email Address *

Enter your phone number *

Country/region *

Company name *

Job Role*

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](#).

Done

[Already have a Power BI account? Sign in](#)

6

7

Sign in

Power BI Desktop and the Power BI service work seamlessly when you're signed in.

Email

Sign in

[Need a Power BI account? Try for free](#)



Open the Repfabric Power BI Template

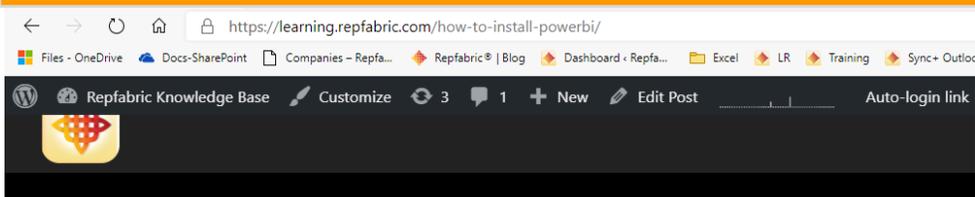
We have provided a pre-built template of visualizations for your immediate usage of the information surfaced by Repfabric's data in Power BI. Some examples include top opportunities, sales trends, and commission information.

You will either be sent your company's Power BI template or **you can retrieve the most recent template at any time from the article ["How to Install and Connect Power BI to RF."](#)**

You can also launch a Power BI Template from an Email. It does help to have Power BI open before you open the email attachment.

1. Left click the template link on our learning website.
2. Left click the download button.
3. Left click to open the file.

This image shows the page on our learning website "How to Install and Connect Power BI to RF."



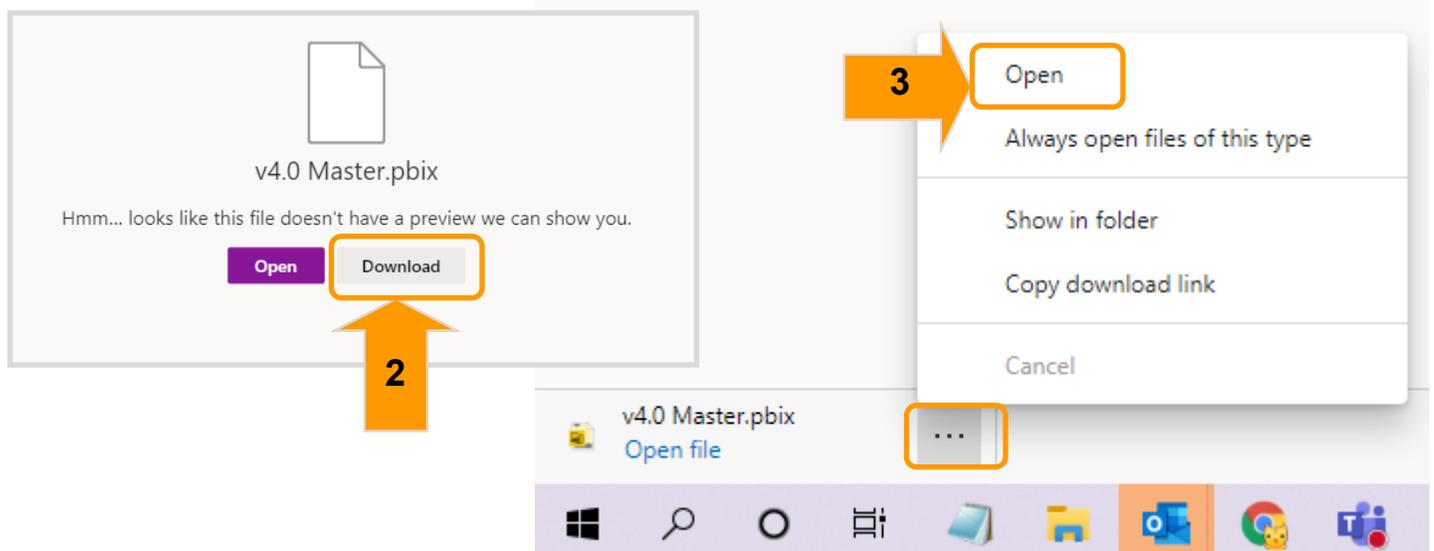
With this new data visualization tool you can go from data to insights in minutes.

Any data, any way, anywhere. And all in one view.

You have three main steps to install PowerBI:

1. Download PowerBI to your computer from <https://powerbi.microsoft.com/en-us/>
2. Use the **Repfabric Template link here.**
3. Use your Repfabric log-in credentials to sync your data from Repfabric into PowerE

A full description with screenshots on how to install PowerBI is attached and you can



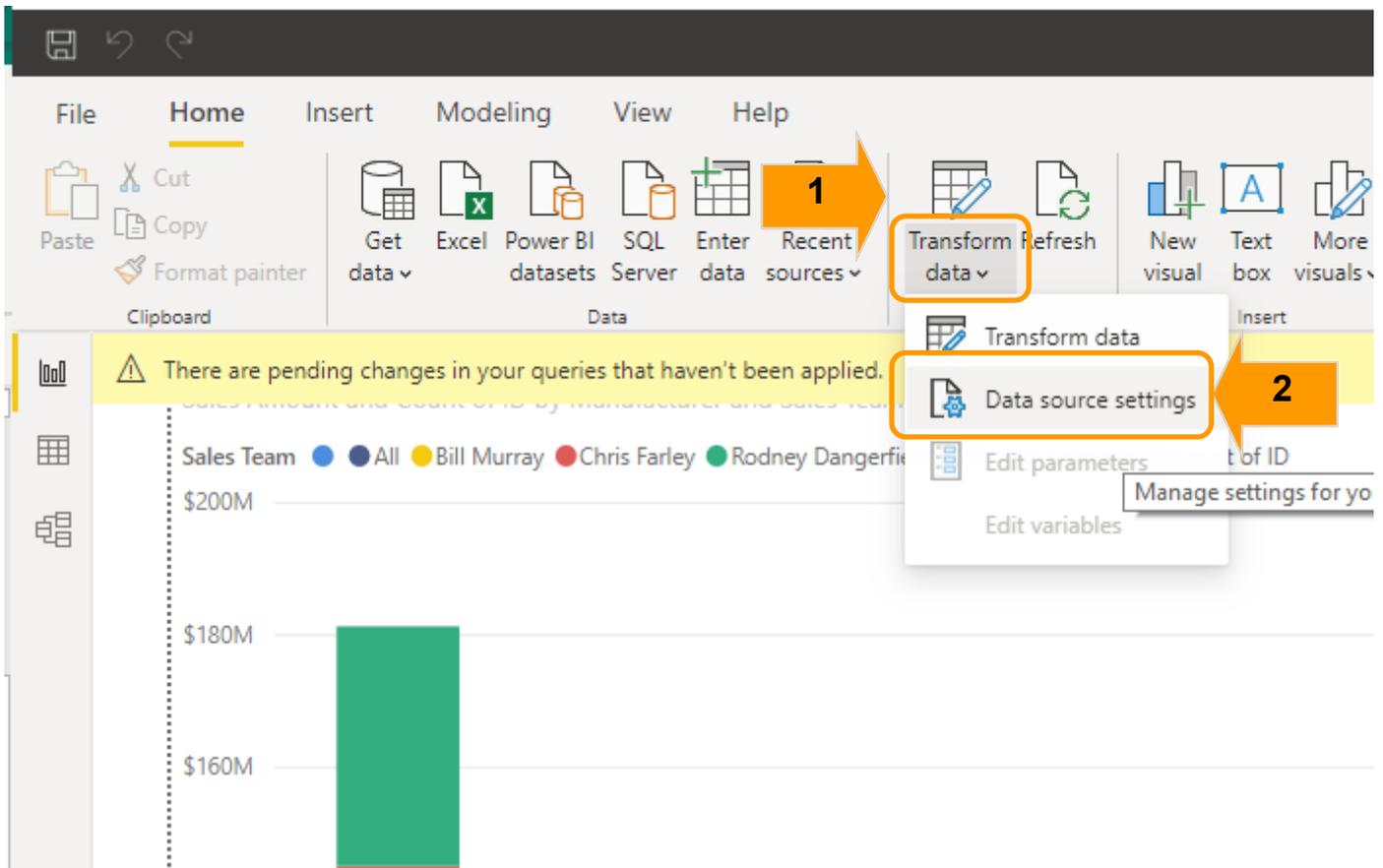


Connecting to your Data

The next step is to connect your Power BI template with your Repfabric server. The Repfabric server will populate the data & charts in the template with your data. Depending on which template you are using, you may be met with connection error messages or simply not see anything at all. **This is expected** during the first opening of the Power BI template before you have “pointed” it to your Repfabric server.

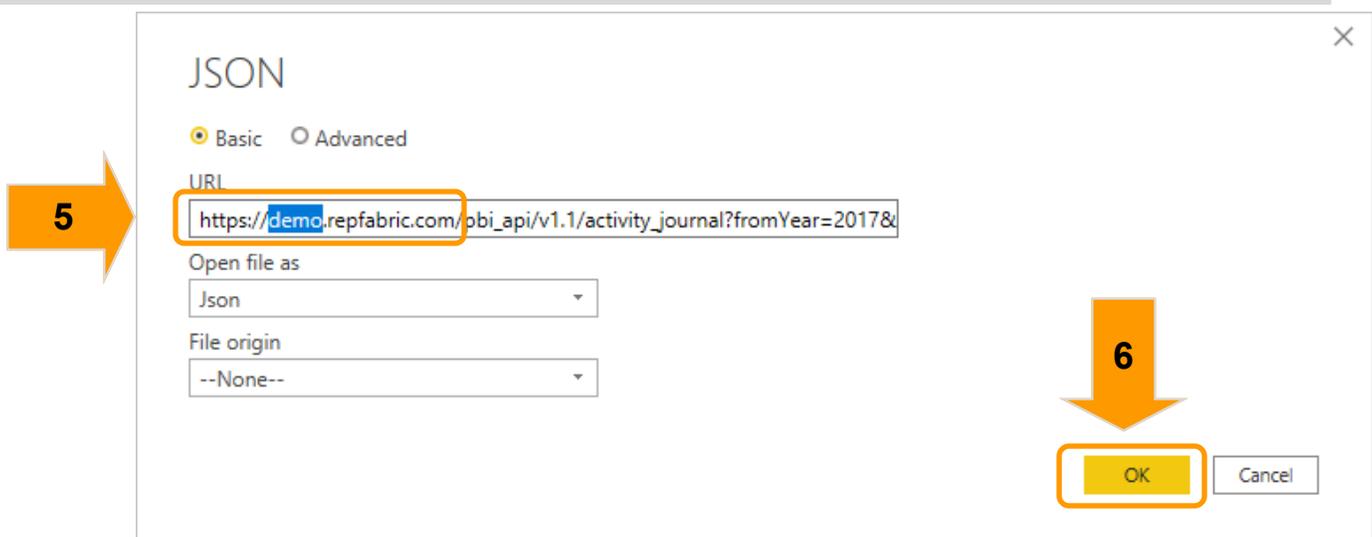
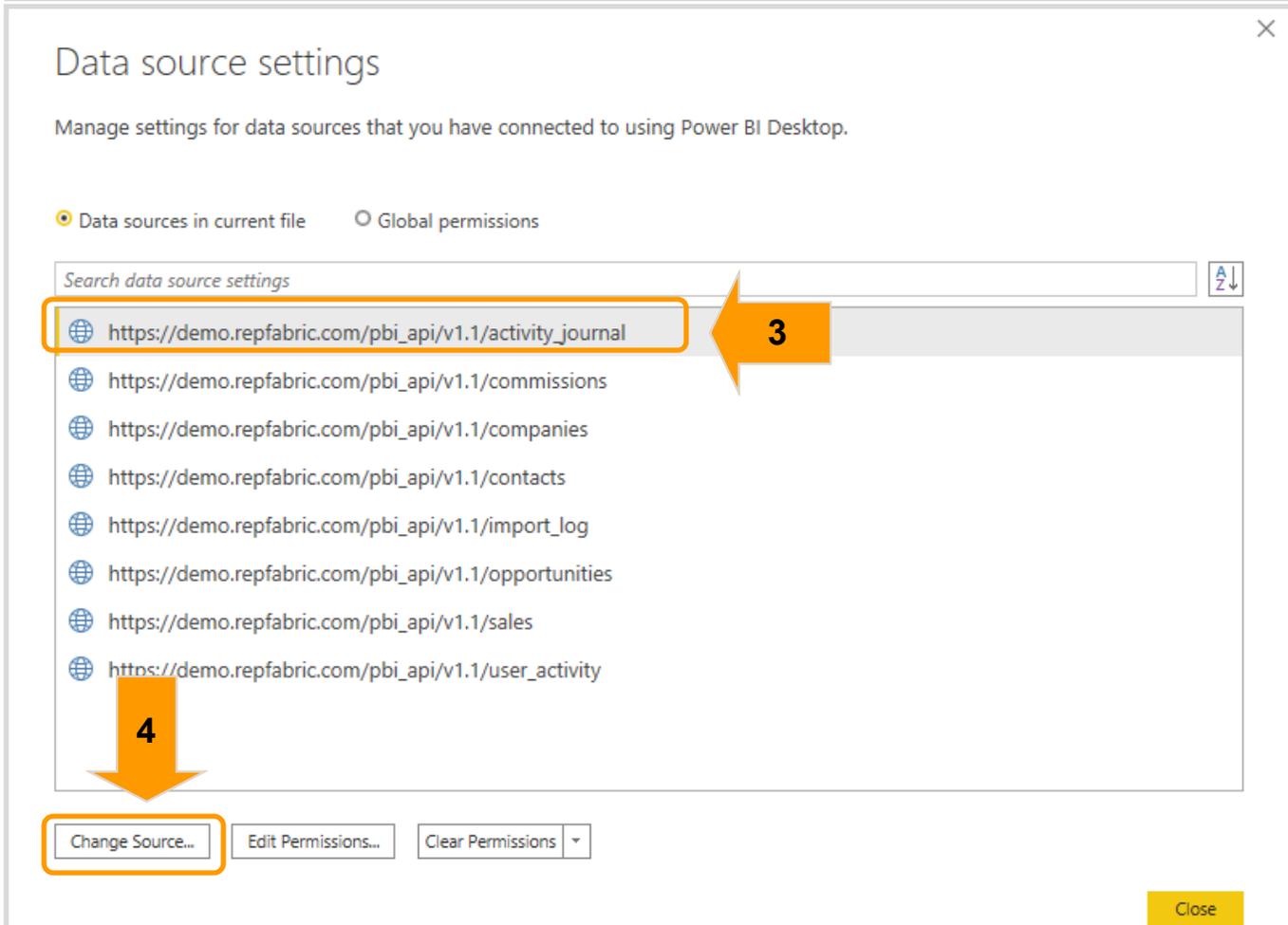
1. Left click “Transform Data.”
2. Left click “Data Source Settings.”

This image shows where you will find “Data Source Settings.”



3. Left click on the first URL.
 4. Left click “Change source” button.
 5. The URL needs to be changed to contain your company name instead of our demo company name. Replace “demo” with your company name or abbreviation.
 6. Left click “OK.”
- * Repeat steps 3-6 for each of the URLs in the list.

This image shows one place to find “Change source...”





Entering Your Credentials in Settings for Authorization

Because there is sensitive financial data in Repfabric, your visibility is restricted to information you are allowed to see in the web portal of Repfabric. You must enter your credentials into Power BI to retrieve data according to your visibility settings. You accomplish this by entering your user id and password for each query in the list.

1. Left click the first URL.
2. Left click "Edit Permissions" button.
3. Left click "Edit" button.
4. Left click "Basic."
5. Enter your email address and password you use to sign into Repfabric.
6. Left click "Save."
7. Left click "Ok."

* Repeat steps 1-7 for each of the URLs in the list.

This image shows where to find the "Edit Permissions..." button.

The image illustrates the steps for entering credentials in Power BI settings for authorization. It shows two screenshots with numbered callouts:

- 1**: Left click the first URL in the list of data sources.
- 2**: Left click the "Edit Permissions..." button at the bottom of the "Data source settings" dialog.
- 3**: Left click the "Edit..." button in the "Edit Permissions" sub-dialog.
- 4**: Left click the "Basic" authentication type in the "Access Web content" dialog.
- 5**: Enter your email address (kim@repsalesforce.com) in the "User name" field.
- 6**: Left click the "Save" button in the "Access Web content" dialog.
- 7**: Left click the "OK" button in the "Edit Permissions" sub-dialog.

How to Install and Connect Power BI to Repfabric (continued...)

7. Left click “Close” when you have changed all the URLs to include your company name, and you have edited the permissions for all of the URLs.
8. Left click “Apply changes” at the top of Power BI .
9. SAVE your Power BI file.

This image shows

The image displays the 'Data source settings' dialog box in Power BI Desktop. The dialog box is titled 'Data source settings' and contains a list of data sources with their respective URLs. The 'Close' button at the bottom right of the dialog box is highlighted with an orange box and an arrow labeled '7'. Below the dialog box, the Power BI Desktop interface is shown. The 'File' menu tab in the ribbon is highlighted with an orange box and an arrow labeled '9'. A yellow notification bar at the bottom of the interface contains the text 'There are pending changes in your queries that haven't been applied.' and the 'Apply changes' button is highlighted with an orange box and an arrow labeled '8'. A separate screenshot of the 'File' menu is shown at the bottom left, with the 'Save as' option highlighted by an orange box.