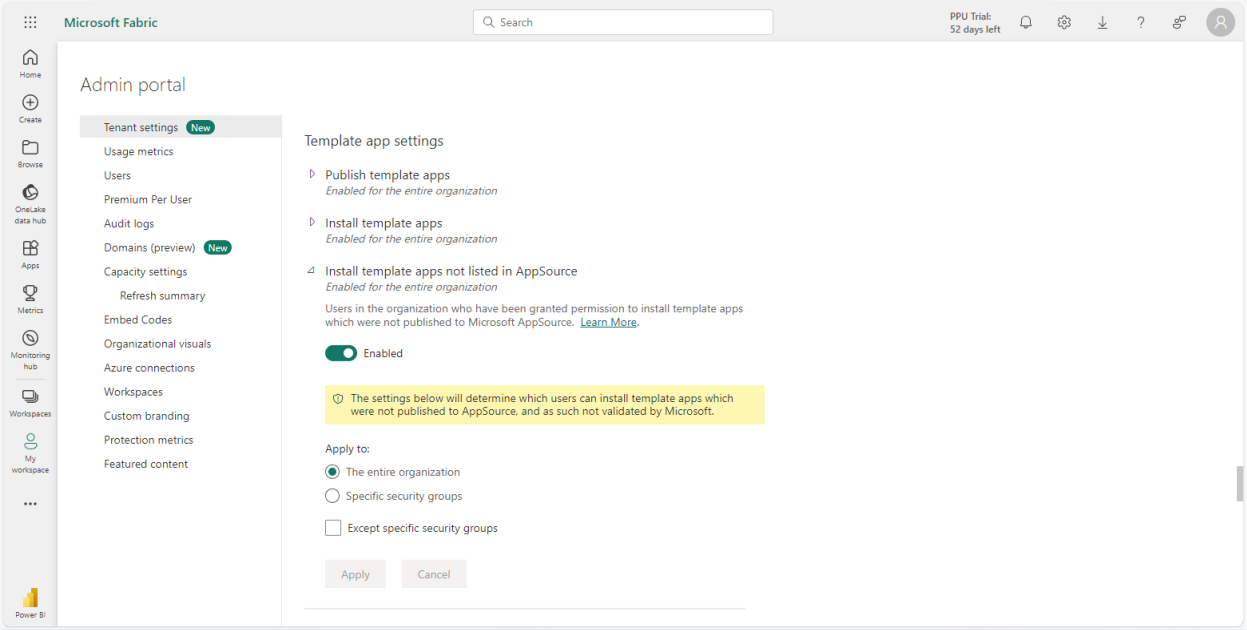
Account Receivables App Installation Guide

Pre-requisites:

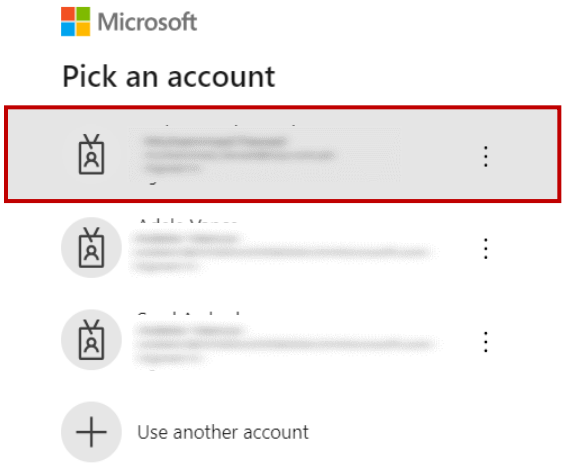
Before you begin, ensure that your tenant settings allow the “Installation of template applications not available on AppSource”.



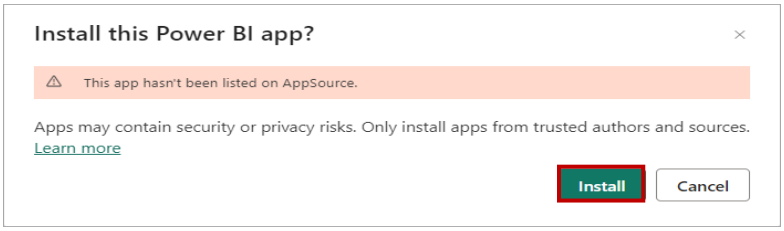
Click on the **Account Receivables**

The link will direct you to the following page.

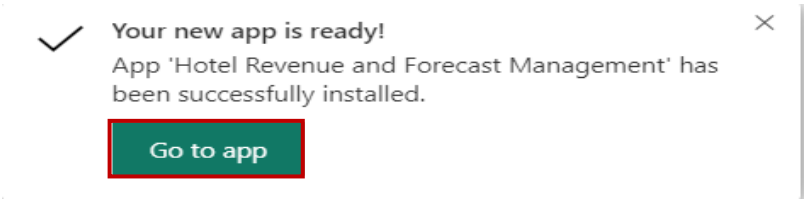
1: Select your organizational account and press **Enter**.



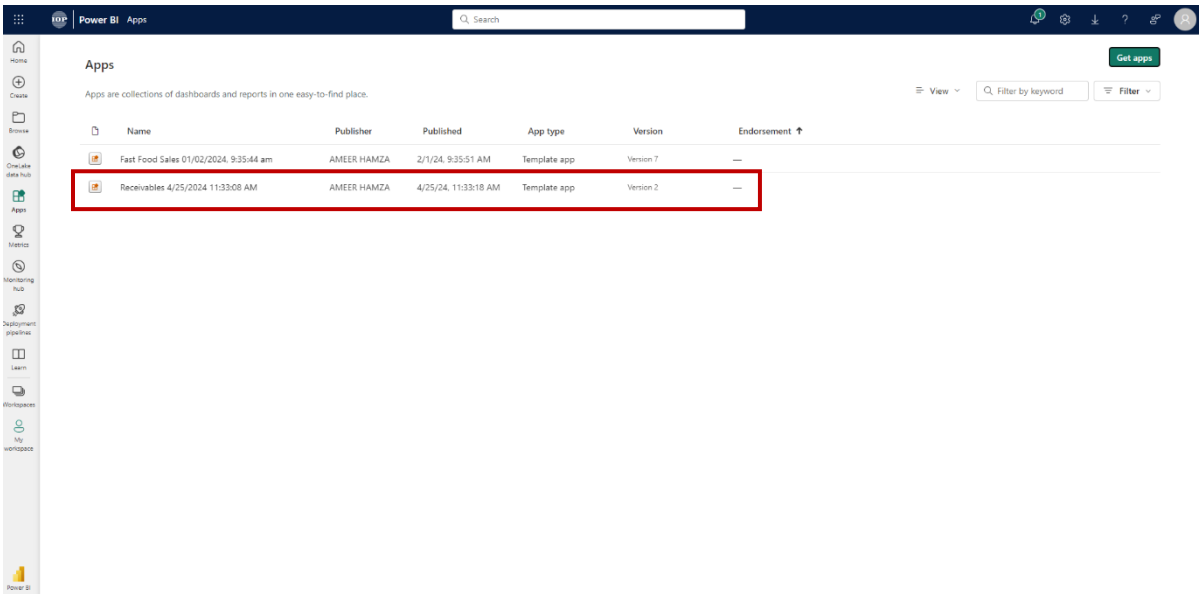
2: Press **Install** to start the workspace installation process. This will create a workspace under your **Workspaces**.



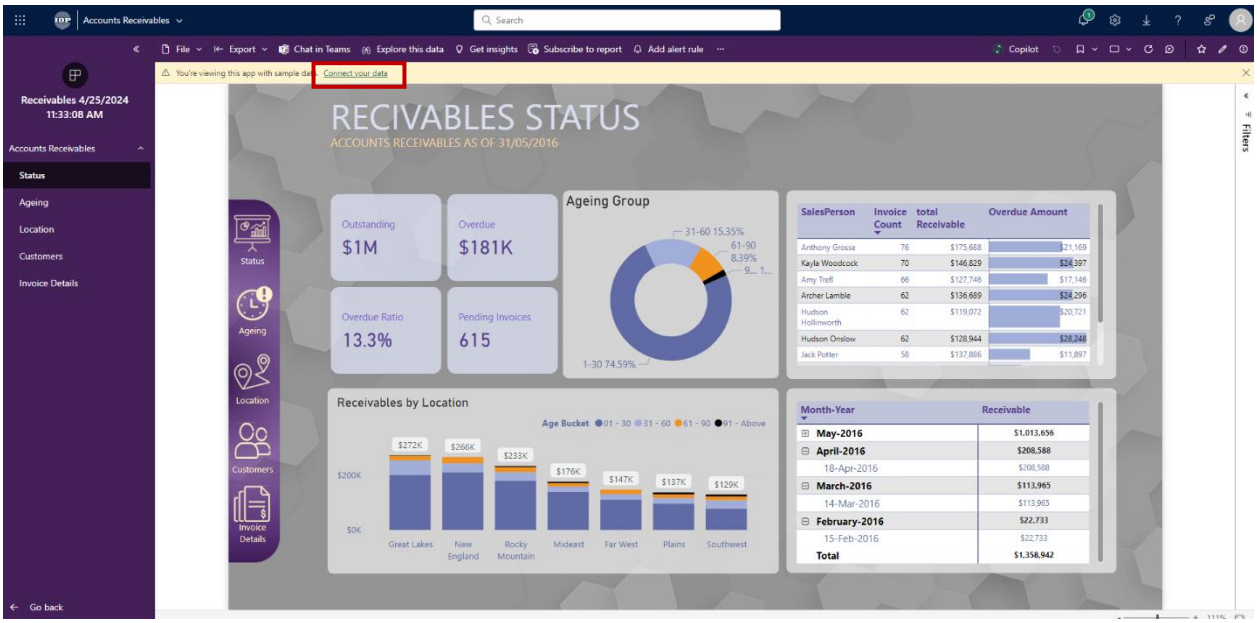
3: After the app is installed successfully, you will see this notification click on **Go to app** this will direct you to the app page.



4: In case you don't see the Notification. In the left pane click on **Apps** there you will see your installed app. Click on the app and it will direct you to the interface as shown below:



5: Click on **Connect your data** to get insights of your data.



6: Insert the path to your data files and click on **Next**.

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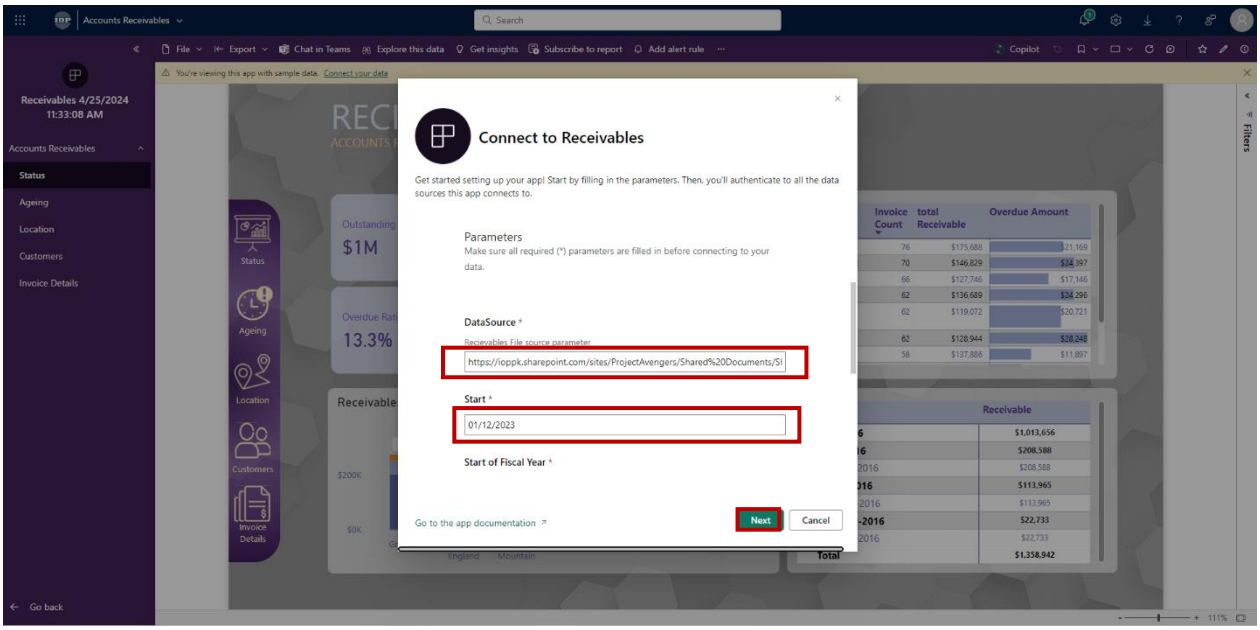
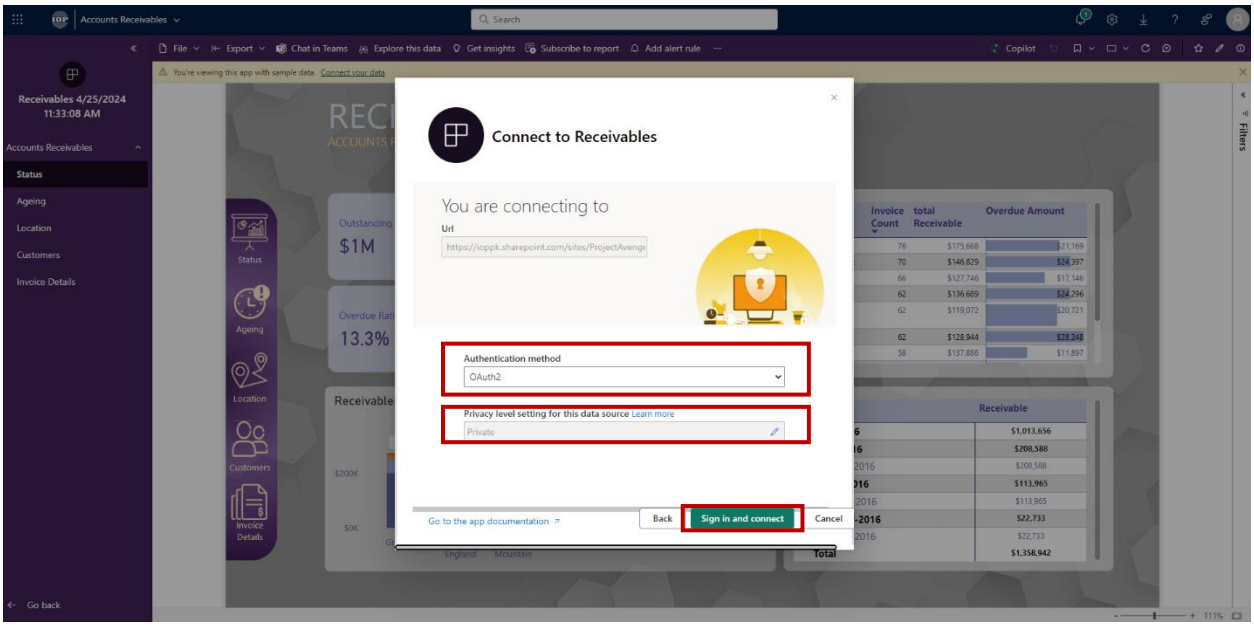


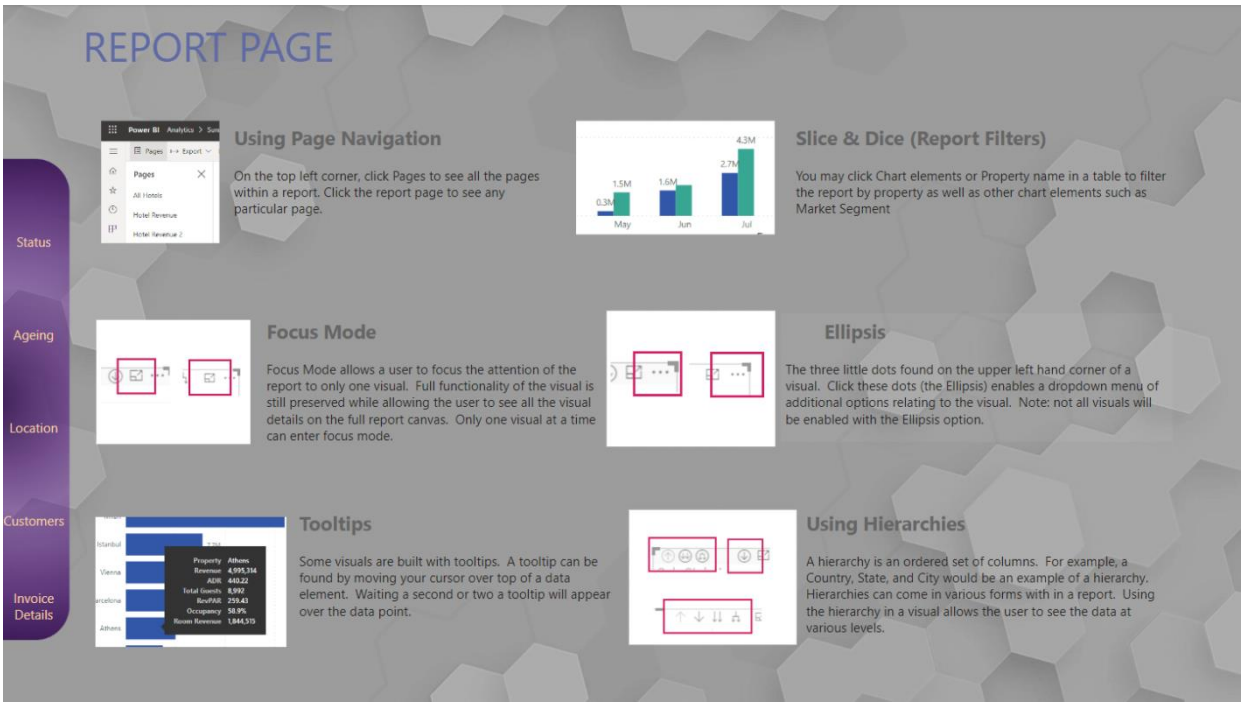
7: After the credentials are verified, you must select **OAuth2** as your authentication method. Write the password of the account which you are using as Power BI service account.
In **Privacy level settings for this data source** select the privacy level you want for your dataset. After that Click on **Sign in and continue.**



Once the data is refreshed, you can view the dashboard and reports of the template app with your own data. You can also customize the app and share it with others in your organization.

8: We recommend you use your own budget and forecast data, but in case if data is not available you can copy **[Account Receivables Data Template](#).xlsx** to your OneDrive and use the path as forecast and budget data.

9: Report Guide



10: Interested in learning more? Book a meeting with us today to discuss how we can help you unlock the full potential for your business needs.

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