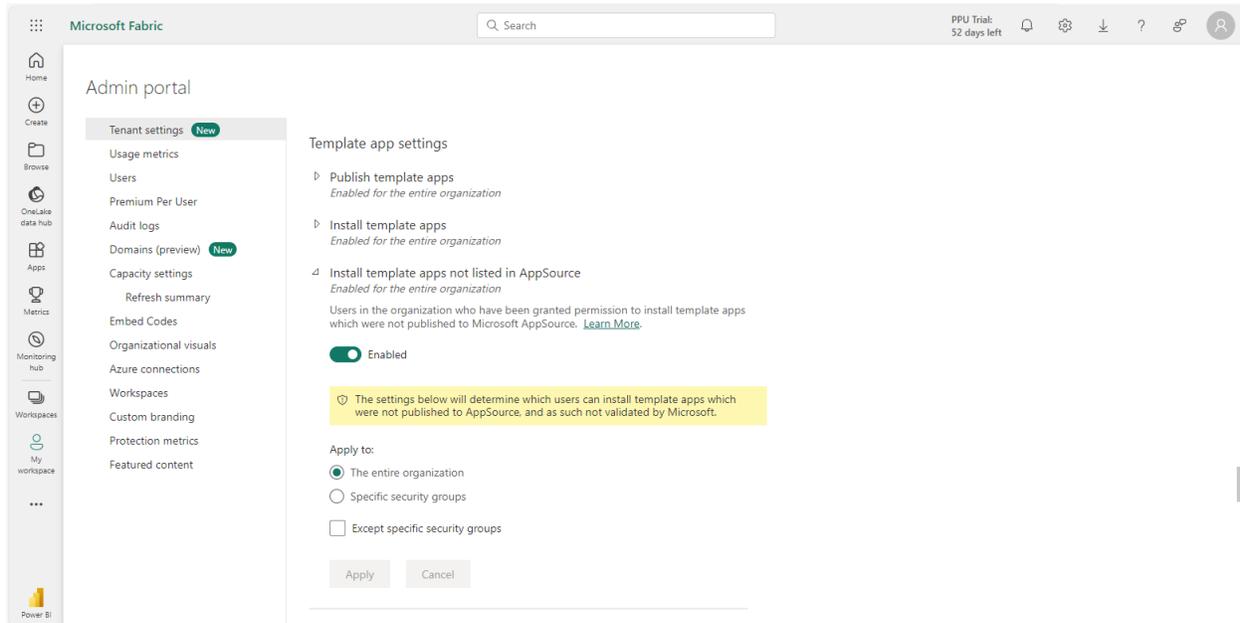


Account Receivables App Installation Guide

Pre-requisites:

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



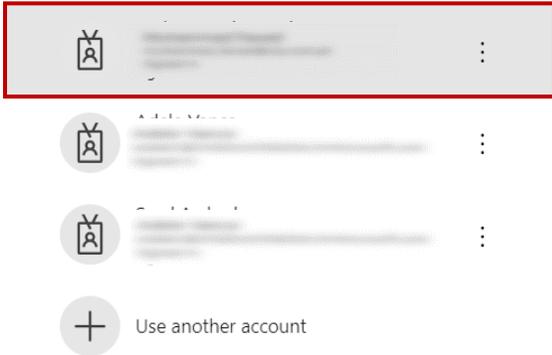
Click on the [Account Receivables](#)

The link will direct you to the following page.

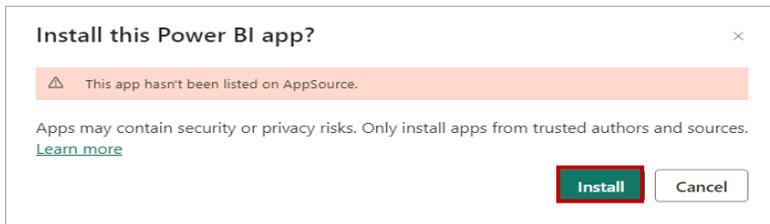
1: Select your organizational account and press **Enter**.



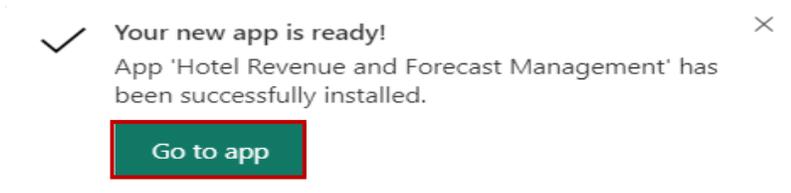
Pick an account



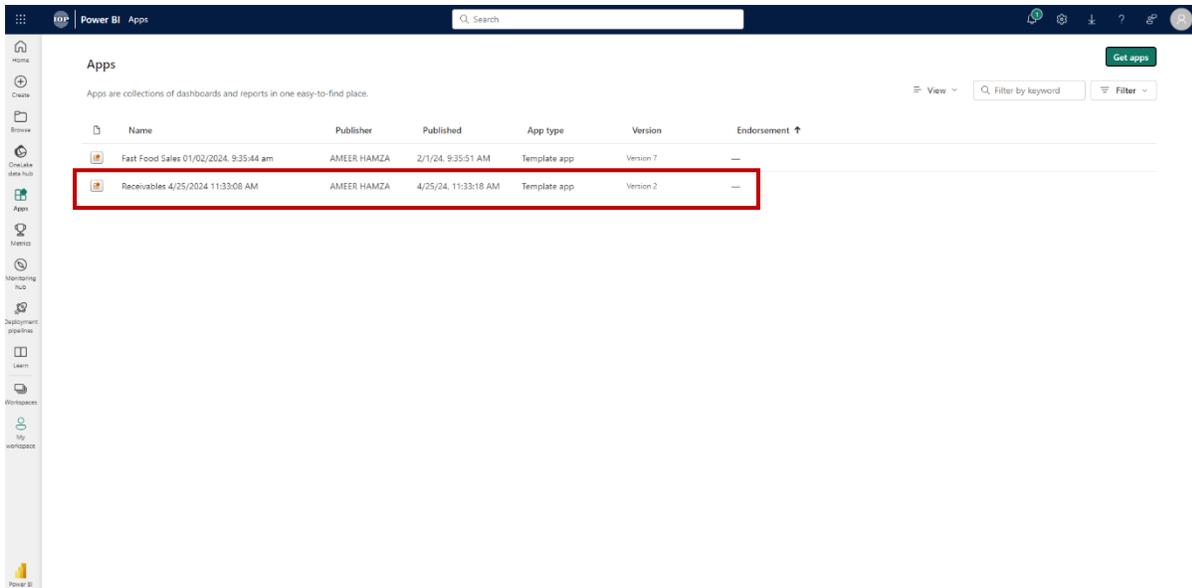
2: Press **Install** to start the workspace installation process. This will create a workspace under your **Workspaces**.



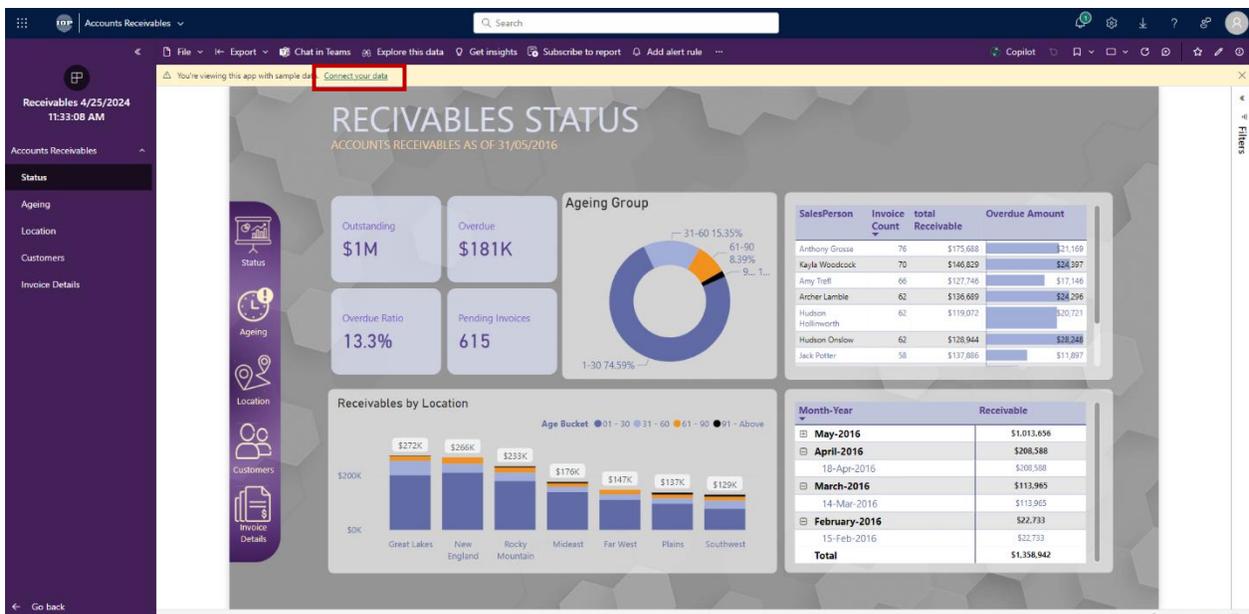
3: After the app is installed successfully, you will see this notification click on **Go to app** this will direct you to the app page.



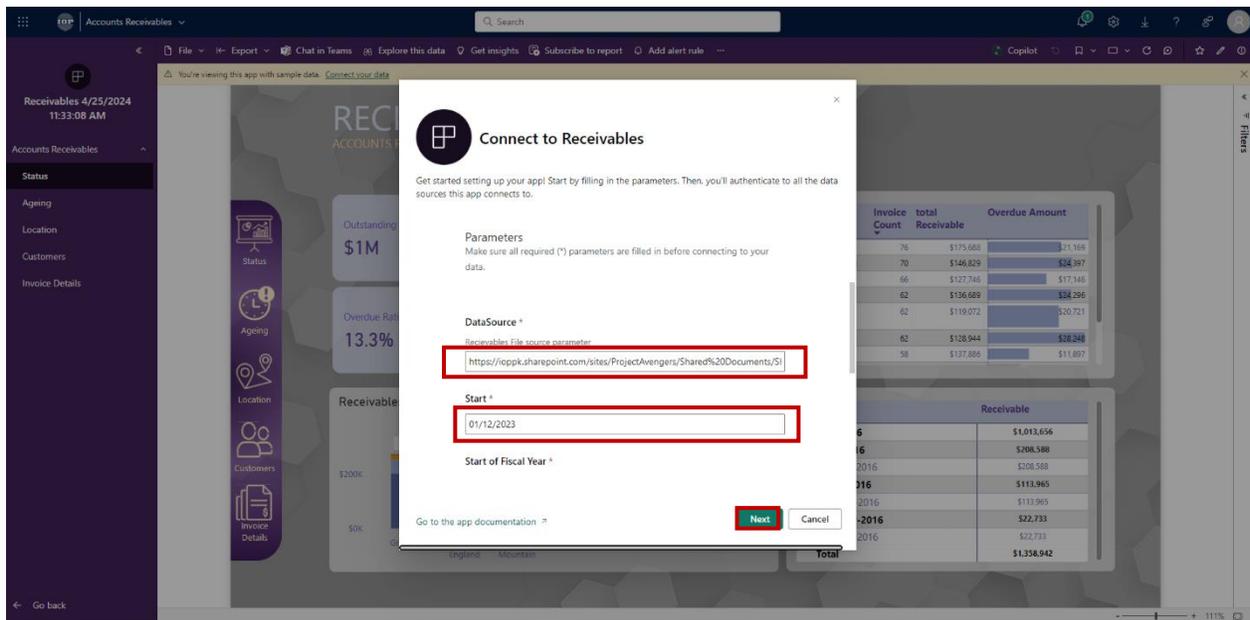
4: In case you don't see the Notification. In the left pane click on **Apps** there you will see your installed app. Click on the app and it will direct you to the interface as shown below:



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

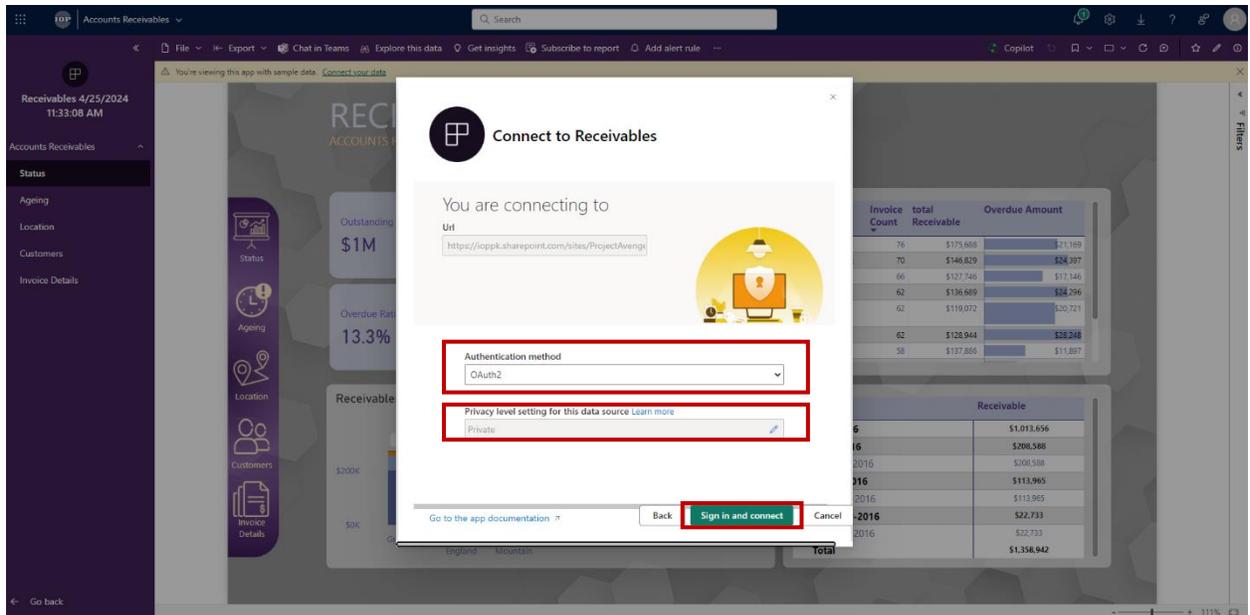


6: Insert the path to your data files and click on **Next**.



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

REPORT PAGE

Using Page Navigation

On the top left corner, click Pages to see all the pages within a report. Click the report page to see any particular page.

Slice & Dice (Report Filters)

You may click Chart elements or Property name in a table to filter the report by property as well as other chart elements such as Market Segment

Focus Mode

Focus Mode allows a user to focus the attention of the report to only one visual. Full functionality of the visual is still preserved while allowing the user to see all the visual details on the full report canvas. Only one visual at a time can enter focus mode.

Ellipsis

The three little dots found on the upper left hand corner of a visual. Click these dots (the Ellipsis) enables a dropdown menu of additional options relating to the visual. Note: not all visuals will be enabled with the Ellipsis option.

Tooltips

Some visuals are built with tooltips. A tooltip can be found by moving your cursor over top of a data element. Waiting a second or two a tooltip will appear over the data point.

Using Hierarchies

A hierarchy is an ordered set of columns. For example, a Country, State, and City would be an example of a hierarchy. Hierarchies can come in various forms within a report. Using the hierarchy in a visual allows the user to see the data at various levels.

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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