

A graphic consisting of a black square in the top-left corner and a blue arrow pointing from the bottom-left towards the top-right, overlapping the black square.

prodware^{TD}

Prodware BI for Retail

for Microsoft Dynamics 365 for Retail

SET UP GUIDE

The logo features the word "prodware" in a bold, lowercase sans-serif font. To its right is a blue icon of a stylized 'D' with a small 'T' inside. Below "prodware" is a small icon of a retail tag with the word "BI" on it, followed by the text "BI for Retail" in a blue sans-serif font.

prodware^{TD}
BI for Retail

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1.1	08/10/2018	Javier Perez		Corp version
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This user document is valid for the **BI for Retail version 1.5 for Microsoft Dynamics 365 for Retail**.

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1. GENERAL INFORMATION

1.1 Description and Objectives

BI for Retail is an analytics solution for **Dynamics 365 for Retail**, developed by *Prodware*.

Based on Microsoft **Power BI** technology, it provides users with quick and easy access to a comprehensive set of reports directly from your **Dynamics 365 for Finance and Operations** user interface; with no change needed in your infrastructure.

Finding a workable way to measure business performance across all channels and gain a holistic understanding of channel performance and customer activity is not easy. Retailers need a specific solution that understands the retail industry and its needs.

Throughout this document you'll find an inventory of reports divided into 17 sections, these facilitate the analysis of different critical aspects for retail such as stores, products (and their categories), employees of each store, customers and customer promotions.

1.2 Application pack contents

Prodware BI for Retail is delivered as a deployable package for Lifecycle Services (ZIP file).

2. INSTALLATION & SET UP

2.1 Getting started

The installation is based on a deployment package that is loaded in Lifecycle Services from **Dynamics 365 for Finance and Operations**.

To carry out the installation, you must:

- > Have the latest version of the **Prodware BI for Retail** deployment package (ZIP file)
- > A **Dynamics 365 for Finance and Operations** environment with the Retail app enabled
- > Have LCS administration access for that environment

Supported versions

- > **Dynamics 365 For Finance and Operations** 8.x (including D365 for Retail)

Prodware BI for Retail is not supported for previous versions of **Dynamics 365** (or **Dynamics AX**) as the cube type that was introduced in version 7.3, is used.

2.2 Step by step

1. Access LCS via <https://lcs.dynamics.com/>
2. Select the environment on which you want to install “PBI for Retail”

3. Access the "Asset Library" section

The screenshot shows the Lifecycle Services interface for an 'Implementation Project (pwNetTest)'. A dropdown menu is open, listing various options. The 'Asset library' option is highlighted in a dark blue bar. Other options include Subscription estimator, Support, System diagnostic, Translation service, Updates, Upgrade analysis, Project settings (with a sub-menu 'Asset library'), Project users, SharePoint Online library, Solution management, and Work items. In the background, a project progress bar shows stages: 'Design and develop' (1/24/2018), 'Test' (1/24/2018), and 'Deploy' (2/1/2018). Below the progress bar, there is a section for 'LCS project configuration' with a red asterisk, and a task '1.2 Invite your project team' with a checkmark.

4. Select "Software deployable package"

The screenshot shows the 'Asset library' interface. On the left, a list of asset types is shown, with 'Software deployable package (12)' selected and highlighted in blue. On the right, a table titled 'Software deployable package files' displays a list of files with columns for Name, Valid, and Version.

Name	Valid	Version
PBi4Retail v1.03	✓	1
PBi4Retail v1.02	✓	1
PBi4Retail v1.01	✓	1
PBi4Retail v1.00	✓	1
PBi4Retail_StoreBasic v1.03	✓	1
PBi4RetailStoreBasic v1.02	✓	1
PBi4RetailStoreBasic v1.01	✓	1
PBi4Retail ENG v1.50	✓	1
Test	✓	1
PBi4Finance v1.31	✓	1
PBi4Finance v1.09	✓	1
PBi4Finance v1.02	✓	1

5. Add a new deployable package (“+” button)
6. Specify a name; this name will not be visible to the end users, it is for LCS administrative purposes.
7. Optionally, add a description for the package.
8. Click on "Add a file" and load the implementation file (ZIP) of Prodware BI for Retail from a local location.

Modified date	Package type
11/22/2018	Application deployable package
11/21/2018	Application deployable package
11/20/2018	Application deployable package
11/19/2018	Application deployable package
11/19/2018	Application deployable package
11/19/2018	Application deployable package
11/19/2018	Application deployable package

Upload Software deployable package file

Name

Description

Add a file

Confirm

Cancel

9. Once confirmed, the environment will validate the package.

Software deployable package files

+	✎	🗑	IMPORT	📄 Copy	SAVE TO MY LIBRARY	VERSIONS	MERGE						
✓	Name	Valid	Version	Scope	Status	Release candidate	Modified date	Package type					
	PBi4Retail v1.03	✓	1	Project	Draft		11/22/2018	Application deployable package					

10. After the validation, return to the LCS main page, select the project and from here, proceed to production environment detail or standard acceptance test (click on “Full details”).

SANDBOX: STANDARD ACCEPTANCE TEST

✓ Environment PWNTEST state:
Deployed

[Full details](#)

11. On the next screen, you will see the environment options. To apply the loaded package, access **Maintain → Apply updates**.

PWNTEST

Deallocate Edit Stop **Maintain** History Notification list Microsoft Azure settings Microsoft Azure portal Software License Terms

Environment updates

PBI4Retail v1.03 (Activity ID: ...)
Asset ID: afd18a77-4db7-4c5f-9a...
Package Type: Application deploy...

15/15 steps completed

Manage environment

Monitoring

- Apply updates: Install customizations and binary deployable packages
- Upcoming updates: View upcoming updates for this environment
- Enable access: Specify your IP address space to enable access to this environment
- Restart service: Specify the service to restart on this environment
- Move database: Move database across environments

12. In the new page, select the deployable package and click on "Apply".

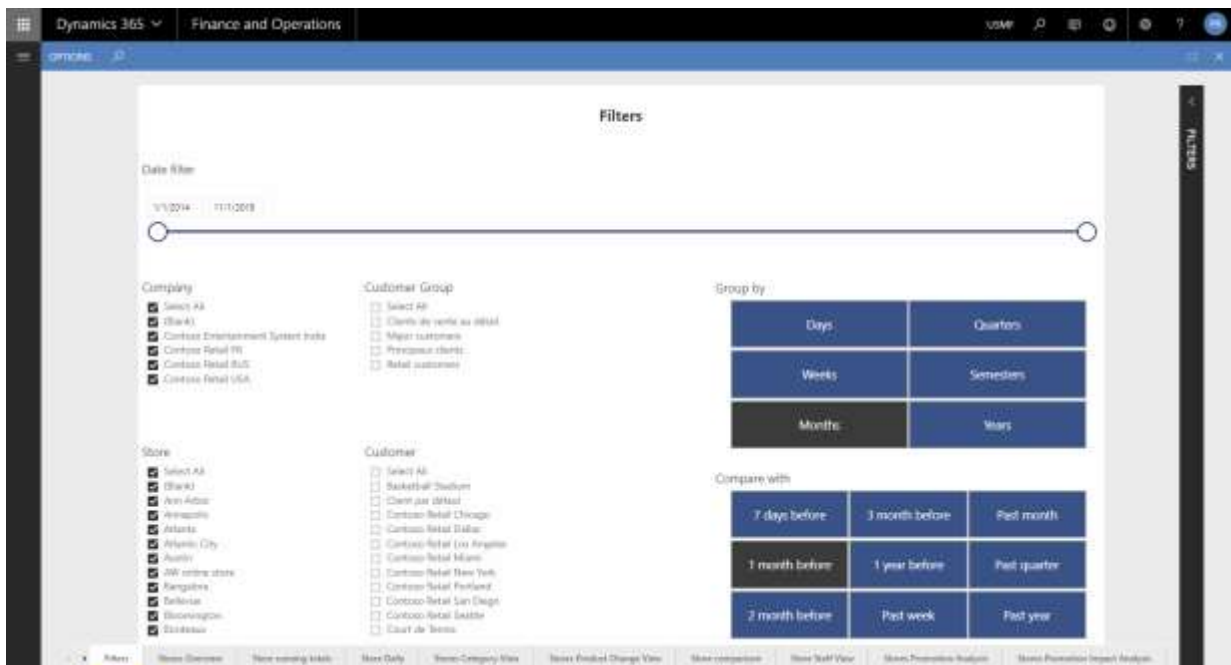
Software deployable package files

+ ✎ 🗑️ IMPORT 📄 Copy SAVE TO MY LIBRARY VERSIONS MERGE

✓ Name	Valid	Version	Scope	Status	Release candidate	Modified date	Package type
PBI4Retail v1.03	✓	1	Project	Draft		11/22/2018	Application deployable package

13. The environment will begin to deploy the package. Upon completion of the deployment, **Prodware BI for Retail** will be operational within the Retail environment.

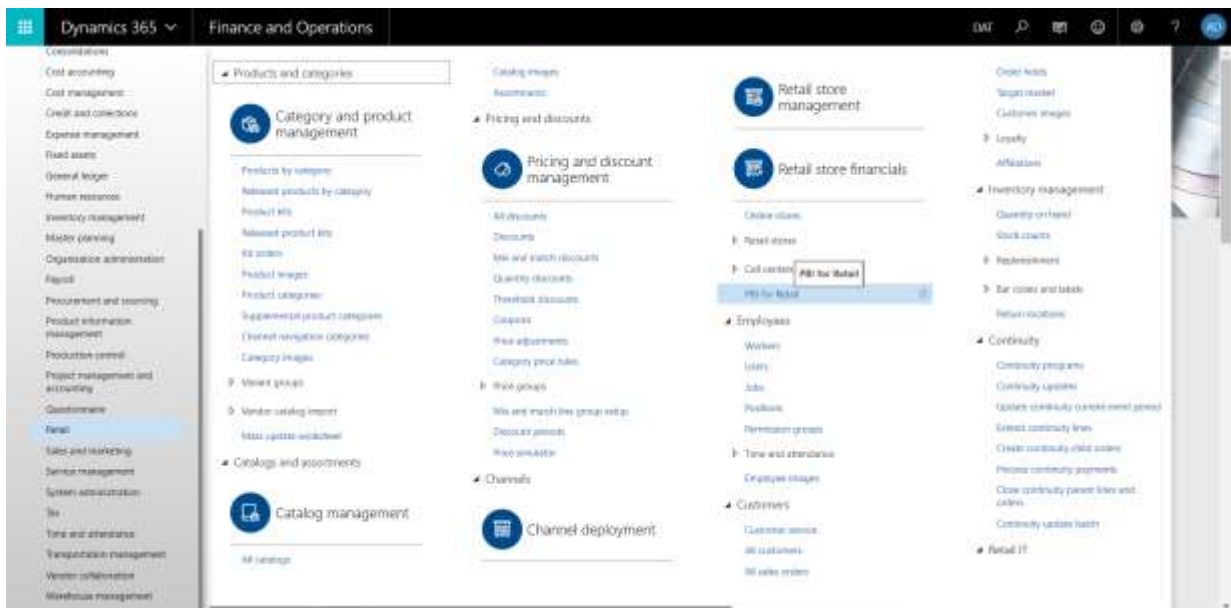
14. To check that the installation was successful, check that the entry "PBI for Retail" appears in the Retail main menu under "Retail store financials" and that it opens correctly.



3. INITIAL OVERVIEW

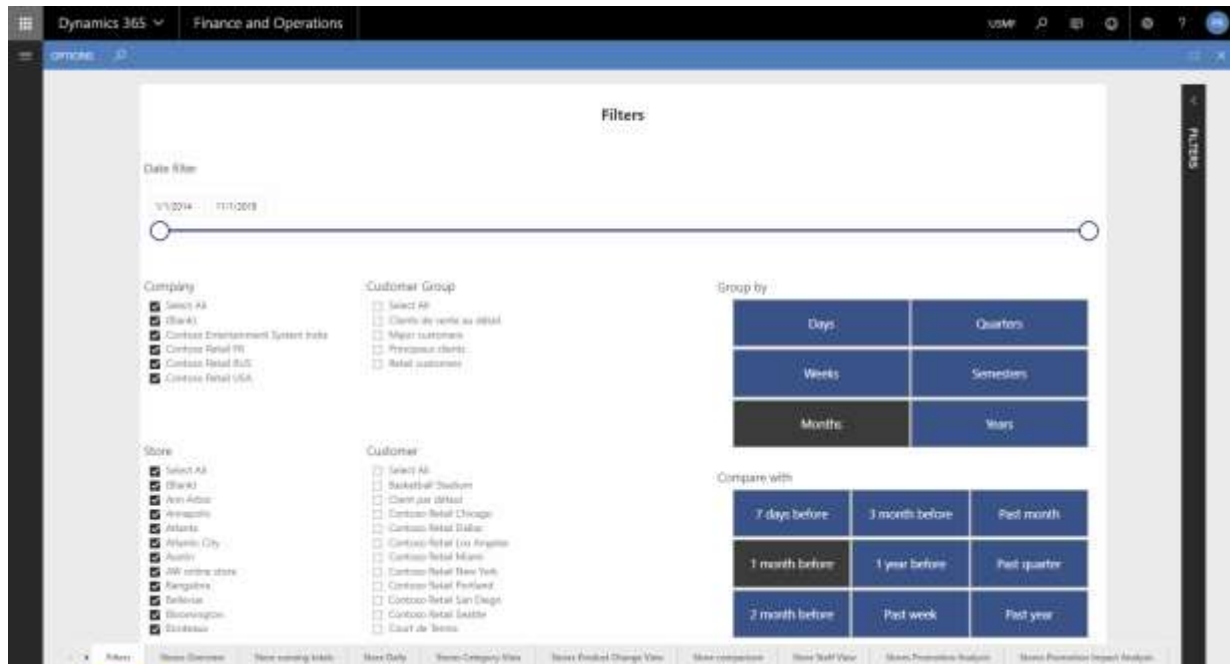
3.1 Accessing the solution

To view the set of reports, please access Dynamics 365 for Finance and Operations, and from the menu on the left, choose the **Retail** section. This action will display a general window, go to **Retail store financials** and select “PBI for Retail”. To facilitate future access, we recommend users to click on the star to place it inside your favorites.



3.2 Filters

In the main screen, you can define Filters such as Dates, Companies or Stores. **These filters will affect all tabs and reports.**



- > **Date filter:** By moving the start and end points, you can filter by the selected period, showing values related to the dates indicated
- > **Companies filter:** Filter by the company(s) from which we want to see the data
- > **Store filter:** Filter by the store we want to see the data
- > **Customer Group filter:** Filter by the group of customers we want to see data for
- > **Customer filter:** You can also filter by a specific customer
- > **Grouping of dates (for days, weeks, months, quarters, semesters, and years):** Select the grouping of the selected dates.
- > **Comparison of dates (7 days before, 1 month before, 2 months before, 3 months before, 1 year before, previous week, previous month, previous quarter etc.):** Compare the same data types for the selected period.