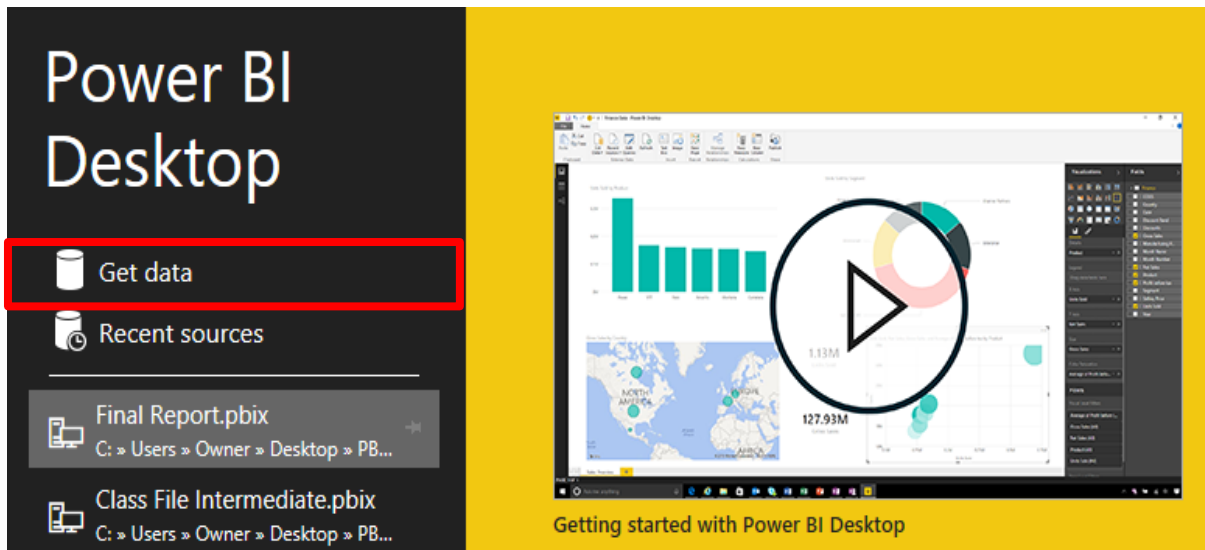
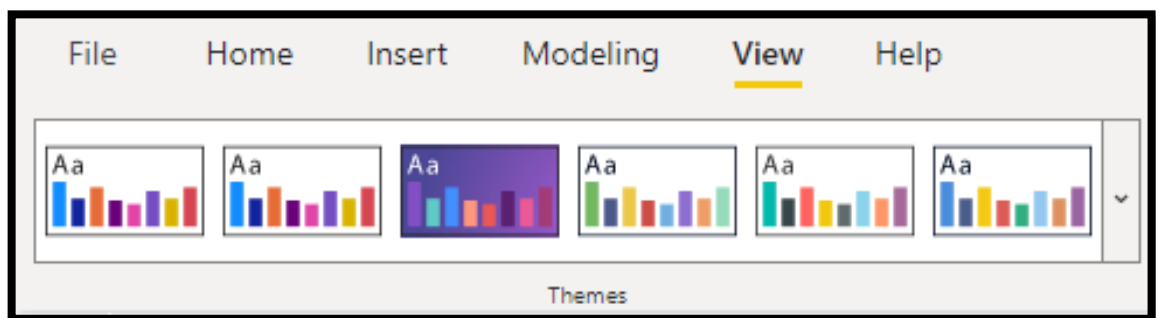


Top 6 Power BI Desktop Tricks

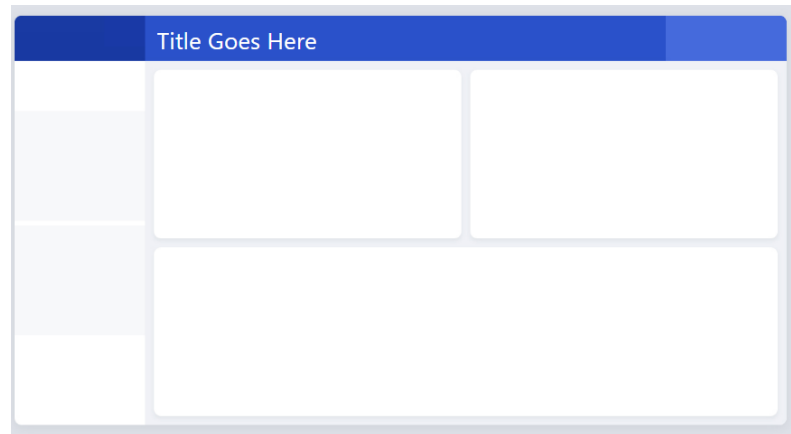
1. **Use the Get data button** on the startup screen to quickly start a new report and start loading the data. It is the fastest way to begin! The start screen also provides invaluable help on using Power BI with training videos and reference guides.



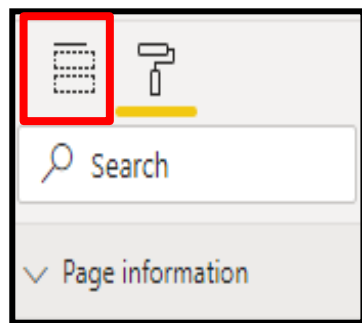
2. **Use Themes** to apply consistent colors and font to a report page instead of formatting each visual individually.



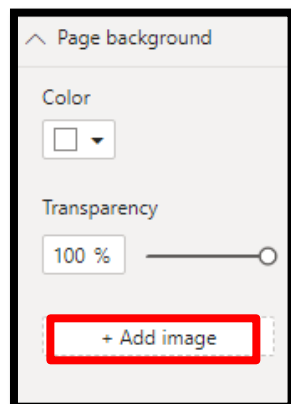
3. **Use a Background Image** to quickly make your reports look more professional. To insert a background image:



- a. Make sure that no object is currently selected on the **Reports** screen.
- b. Click on the **Format** button.



- c. Open the **Page background** category.

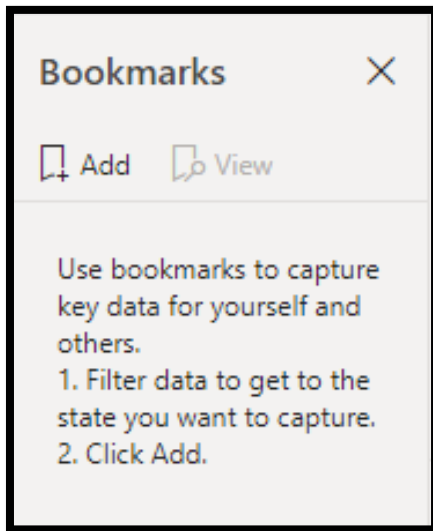


- d. Click on **Add Image** and select your image.
- e. Change the **Image Fit** to "Fit."
- f. Change the **Transparency** to 0%.

4. **Create Bookmarks** so that users will be able to filter for common solutions automatically. You can create as many bookmarks as you like.

To create bookmarks on the Reports screen:

- a. Turn on the **Bookmarks** pane (View – Bookmarks)



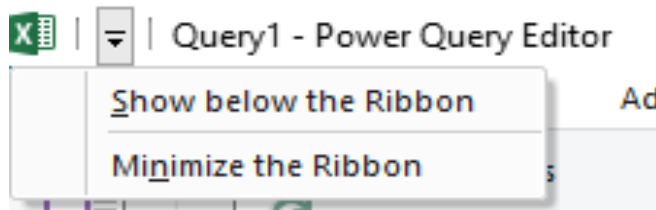
- b. Filter the data in a way that tells the necessary story.
- c. Click on **Add**.
- d. Click on the ellipsis to **Rename** it.

*** It is highly recommended that you create a bookmark for all unfiltered data so that users can get the report back to showing all quickly!**

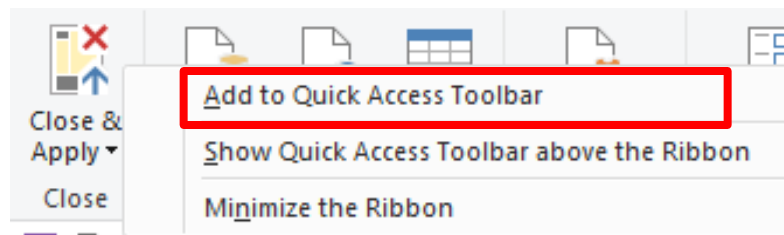
5. **Take advantage of Auto Detection.** If your datasets have different field names for related fields (e.g., Customer ID & CUST ID), you should rename them within Power Query (e.g., Customer ID & Customer ID) so that Power BI will auto detect matching fields and recognize relationships automatically.

6. Set up the Quick Access Toolbar in Power Query

- a. Open **Power Query Editor**.
- b. Click on the drop-down arrow on the QAT (Quick Access Toolbar) in top-left of screen and click on “Show below the Ribbon.”



- c. Then right click on any button in the ribbon that you want to add to the QAT (e.g., the **Close & Apply** button) and click on “Add to Quick Access Toolbar.”



- d. This will now add the button to the QAT and save you from always having to switch back to the Home tab to find it!

Popular Power Query buttons to add to the QAT are:

- Close & Apply
- New Source
- Choose Columns
- Go to Column
- Merge Queries
- Append Queries
- Extract
- Custom Column
- Add Column → Date
- Data source settings