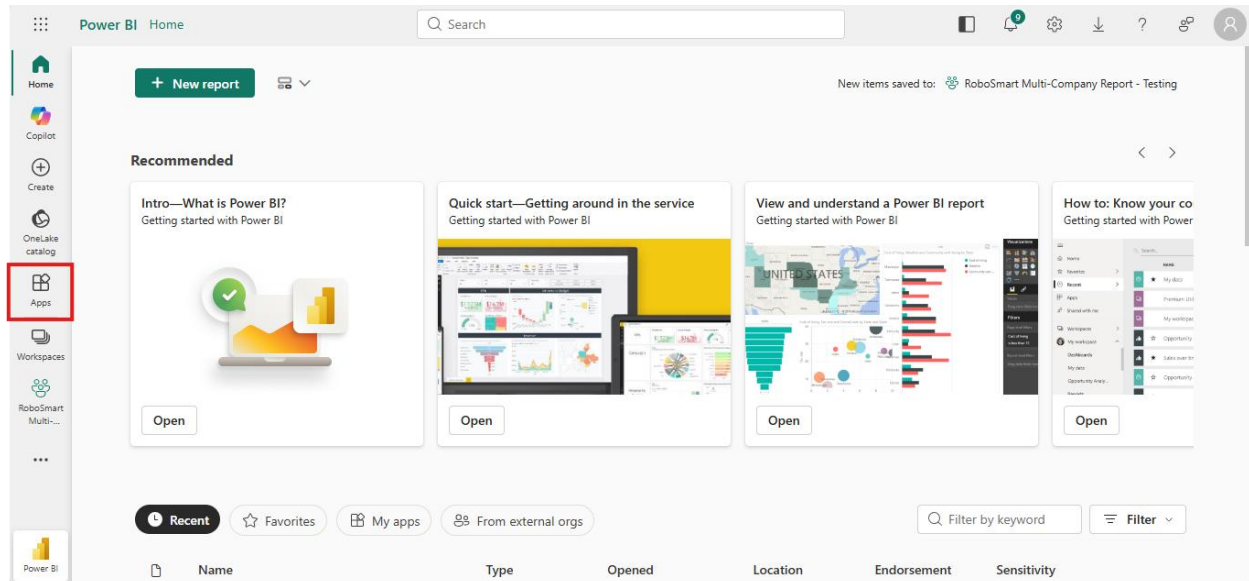


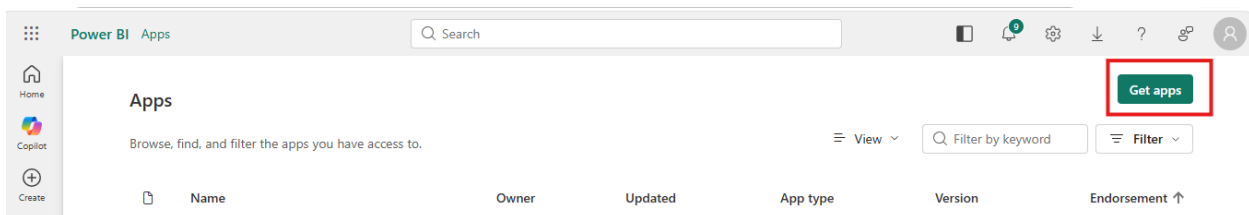
RoboSMART Multi-Company Report – Getting Started

Step 1:

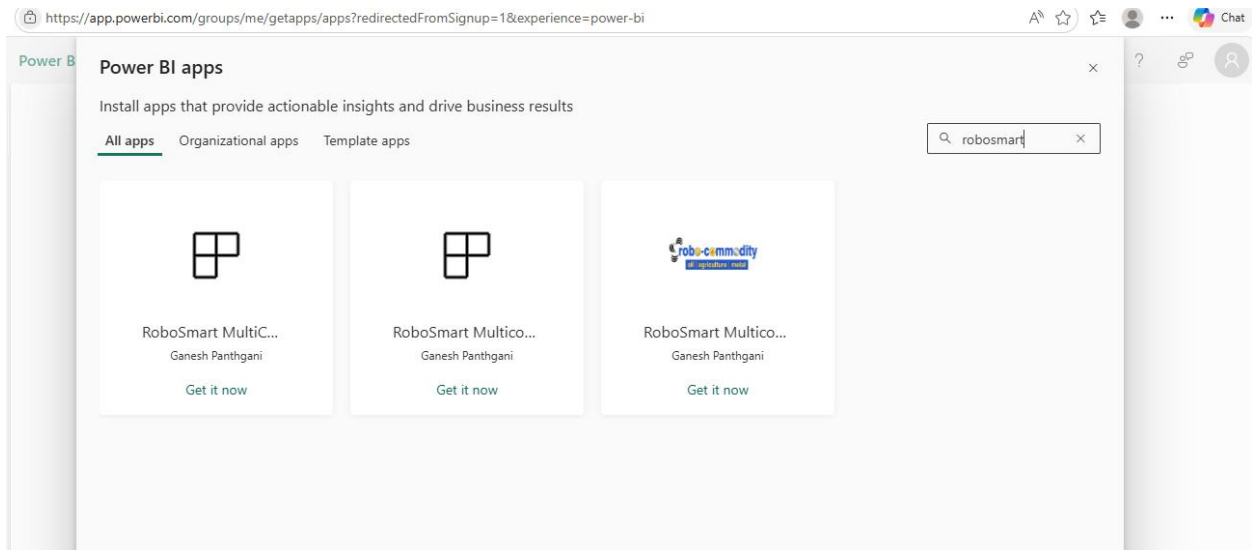
Go to Power BI Service, on left side panel Click Apps



& on top right Click Get Apps



and power bi apps page pop ups. In search box, enter RoboSmart Multi-Company report and Click Get it now to Install the Template App.



Step 2:

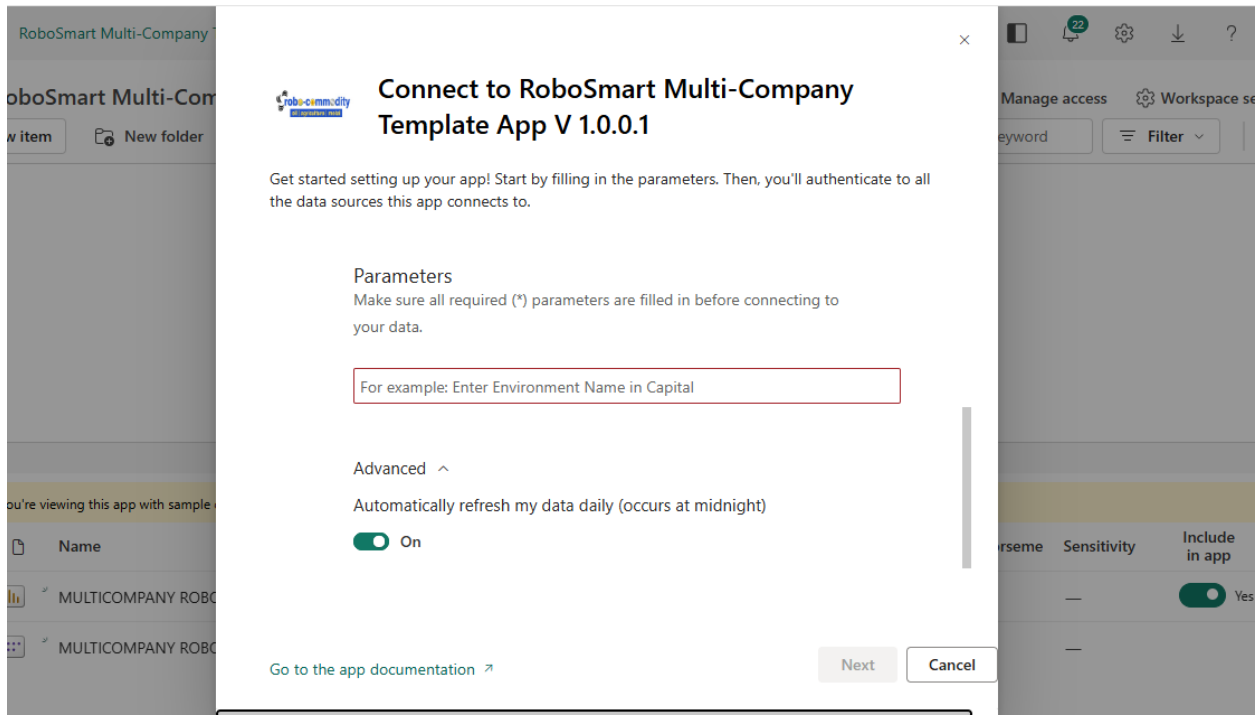
A workspace will be created by the file name & file is stored inside it. Click on connect to data to connect with your database.

The screenshot shows the workspace for 'RoboSmart Multi-Company Template App V 1.0.0.1'. The top bar includes buttons for 'New item', 'New folder', 'Import', and 'Migrate'. Below the top bar, there are options to 'Select a predefined task flow' or 'Add a task'. A section titled 'Choose from predefined task flows or add a task to build one' is visible. Below this, there is a table with columns: Name, Status, Type, Task, Owner, Refreshed, Next refresh, Endorsement, Sensitivity, and Include in app. The first row is highlighted in yellow and has a red box around the 'Connect your data' button. The second row is a report titled 'MULTICOMPANY ROBOSMART TEMP'.

Name	Status	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Sensitivity	Include in app
MULTICOMPANY ROBOSMART TEMP	Report	—	RoboSma...	22/07/2026, ...	—	—	—	—	Yes
MULTICOMPANY ROBOSMART TEMP	Semantic ...	—	RoboSma...	22/07/2026...	N/A	—	—	—	—

Step 3:

Enter the Environment Name and Click OK.



Connect to RoboSmart Multi-Company Template App V 1.0.0.1

Get started setting up your app! Start by filling in the parameters. Then, you'll authenticate to all the data sources this app connects to.

Parameters
Make sure all required (*) parameters are filled in before connecting to your data.

For example: Enter Environment Name in Capital

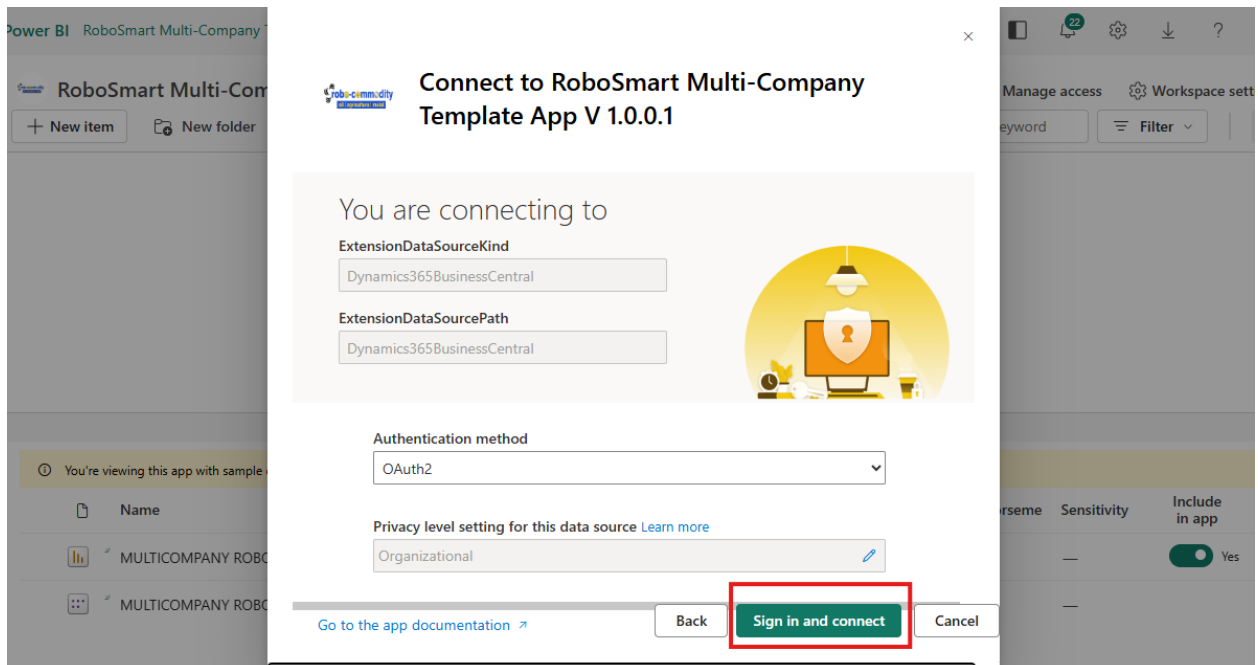
Advanced ^

Automatically refresh my data daily (occurs at midnight)
☒ On

[Go to the app documentation](#) [Next](#) [Cancel](#)

Step 4:

Authenticate using your Microsoft Business Central account.



Connect to RoboSmart Multi-Company Template App V 1.0.0.1

You are connecting to

ExtensionDataSourceKind
Dynamics365BusinessCentral

ExtensionDataSourcePath
Dynamics365BusinessCentral

Authentication method
OAuth2

Privacy level setting for this data source [Learn more](#)
Organizational

[Go to the app documentation](#) [Back](#) [Sign in and connect](#) [Cancel](#)

Step 5:

Allow the initial dataset refresh to complete.

RoboSmart Multi-Company Template App V 1.0.0.1

+ New item

New folder

→ Import

Migrate

Update app

Manage access

Workspace settings

...

Filter by keyword

Filter

Choose from predefined task flows or add a task to build one

Select from one of Microsoft's predefined task flows or add a task to start building one yourself.

Select a predefined task flow

Add a task

→ Import a task flow

You're viewing this app with sample data. Refresh is in progress.

	Name	Status	Type	Task	Owner	Refreshed	Next refresh	Endorsement	Reset
	MULTICOMPANY ROBOSMART TEMP		Report	—	RoboSma...	22/07/2026, 15:30:19	—	—	
	MULTICOMPANY ROBOSMART TEMP		Semantic ...	—	RoboSma...	22/07/2026, 15:...	23/07/2026, 00:00:00	—	

Step 6

Open the report and begin exploring dashboards.

Requirements

- Microsoft Power BI account
- Microsoft Dynamics 365 Business Central (Cloud)
- Appropriate Business Central permissions
- Internet connectivity

Recommended Permissions

The user configuring the Template App should have access to all Business Central companies intended for reporting.

Refresh

After configuration, schedule dataset refresh in Power BI Service according to your organization's requirements.

Need Help?

support@robo-soft.net