

The logo consists of two stylized, overlapping chevron-like shapes. The top shape is a dark brown color, and the bottom shape is a light cream color. They are positioned diagonally, with the top shape pointing towards the upper right and the bottom shape pointing towards the lower right.

# STONERIDGE CONNECT

2018 Client Conference

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How to Make Dashboards and Power  
BI Great Together

# How to Make Dashboards and Power BI Great Together

Power BI  
Overview

Options for  
Connecting  
Power BI to  
Dynamics CRM

Creating  
Dashboards  
Using  
Dynamics CRM  
data

Demonstration



# About the Speaker

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# About the Speaker

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More about Imran:

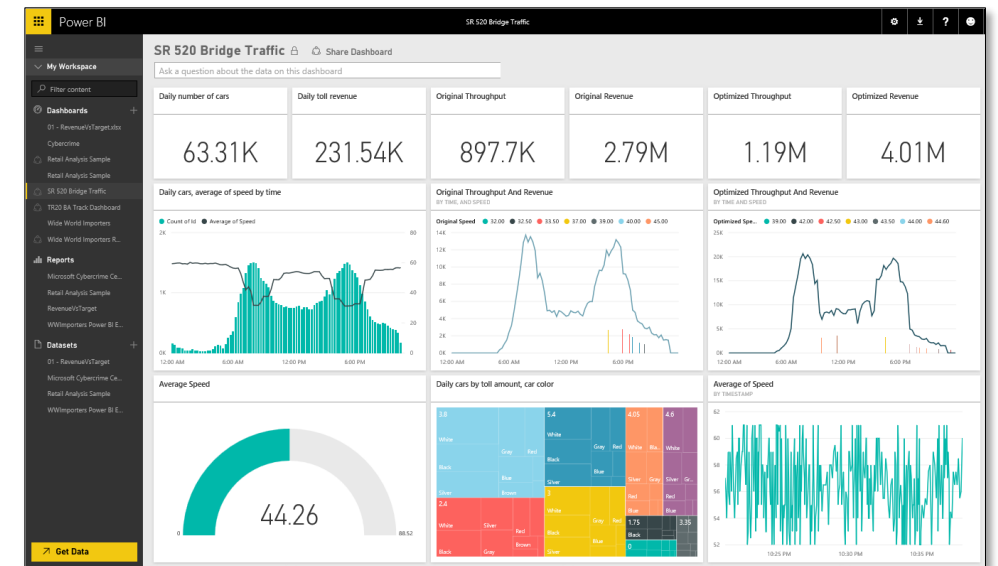
<https://stoneridgesoftware.com/team/imran-burki/>

# Power BI Overview

# Power BI Overview

*Experience your data. Any data, any way, anywhere*

- Power BI is a cloud-based business analytics service that enables
  - fast and easy access to your data
  - a live 360° view of your business
  - data discovery and exploration
  - insights from any device
  - collaboration across your organization
  - anyone to visualize and analyze data



# Power BI Overview



# Options for Connection Power BI to Dynamics CRM



# Connecting Power BI to Dynamics CRM



## Power BI Content Packs

- Distributed in PowerBI.com marketplace
- Allow you to connect to D365 and other services
- Power BI app with a set of dashboard and reports
- Data model already created
- Ready-made Power BI dashboards
- Ability to customize content



## Dynamics CRM (Online)

- Connect to Dynamics 365 (online) with Power BI Desktop
- Uses D365 Odata endpoint URL
- Have to model data in Power BI
- Currently, the Power BI service isn't compatible with the Dynamics 365 (online) version 9.0 OData endpoint – use version 8.2 Odata endpoint

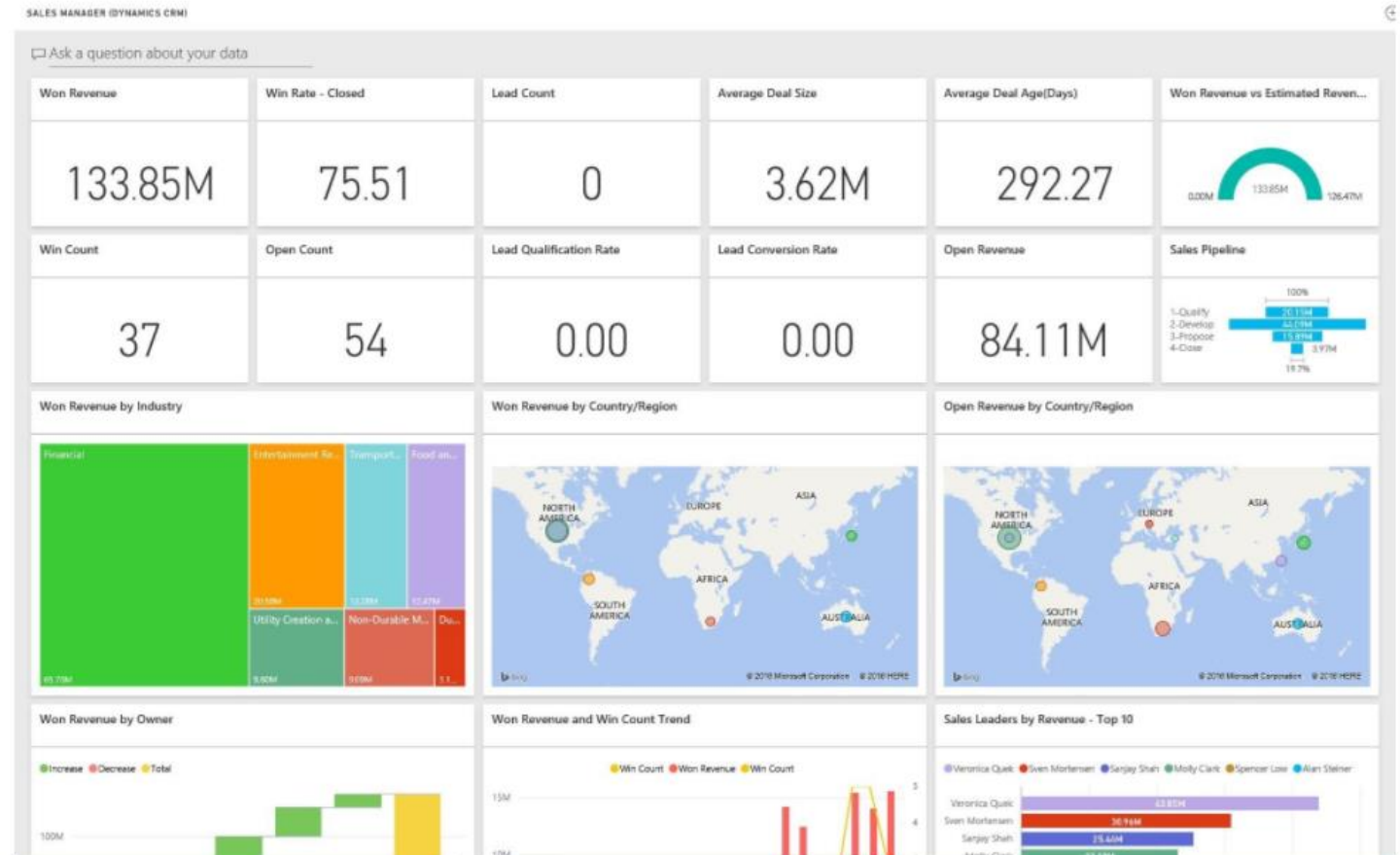


## Extract to Data Warehouse

- Extract data from CRM and load it into a data warehouse
- Ability to integrate with other data sources
- No need to model data in Power BI
- Most time-consuming and costly of last two options

# Power BI CRM Content Packs (Apps)

- Uses the Odata feed to create:
  - Descriptive model with all the entities and measures needed such as Accounts, Activities, Opportunities, Product, Leads, Users and more
  - After you install the app, you can view the dashboard and reports in the Power BI service (<https://powerbi.com>)



# Power BI CRM Content Packs (Apps)

- Meant to provide operational reporting on near term data with focus on a team or group
- Each query is limited to retrieve a maximum of 100K records from Dynamics CRM Online
- If your account is too large, consider connecting through the Power BI Desktop to build a custom solution

## What's included in the content pack?



### **Sales Manager**

The dashboard and reports contain key metrics such as:

Won Revenue  
Win Rate  
Open Revenue  
Lost revenue  
Expected Revenue  
Average Deal Size and more.



### **Service Manager**

These dashboard and reports contain key metrics such as:

CSAT Percentage  
SLA Met percentage  
Escalated Cases Percentage  
Average Handling Time  
Total Resolved Cases  
Total Active Cases  
Number of Times KB Article Used in cases and more.

# Process of Creating Dashboards

# Power BI Dashboard Creating Process

## Content Packs

Get CRM App from PowerBI.Com

Connect to Dynamics CRM

View Dashboard in PowerBI.Com

Open Power BI desktop and select dataset to start development

## Power BI connect to D365

Connect to Dynamics CRM from Power BI Desktop

Model data in Power BI Desktop

Create dashboard

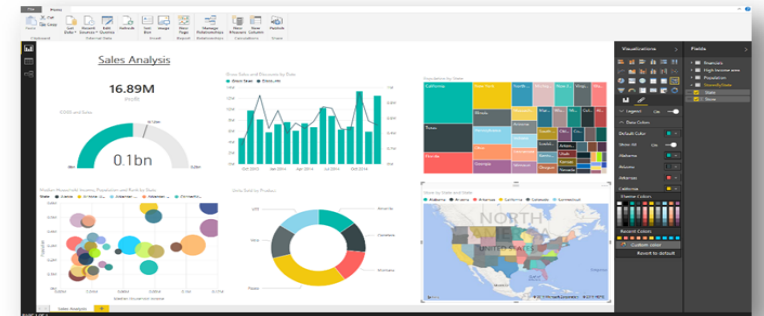
# Power BI Dashboard Creating Process

## Power BI Desktop



Prepare, explore, report and collaborate with Power BI Desktop

- Acquire and prepare data with extensive query capabilities
- Establish data structure and transform and analyze data
- Explore data in new ways through a freeform, drag-and-drop canvas
- Author reports with a broad range of modern data visualizations
- Publish interactive reports to Power BI



Available as a free, downloadable desktop companion to the Power BI service, **Power BI Desktop is a visual data exploration and reporting tool**

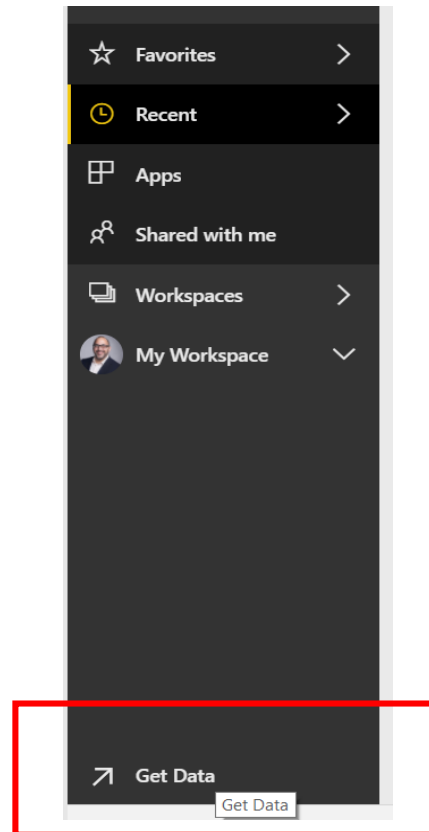
# Demonstration

# Appendix



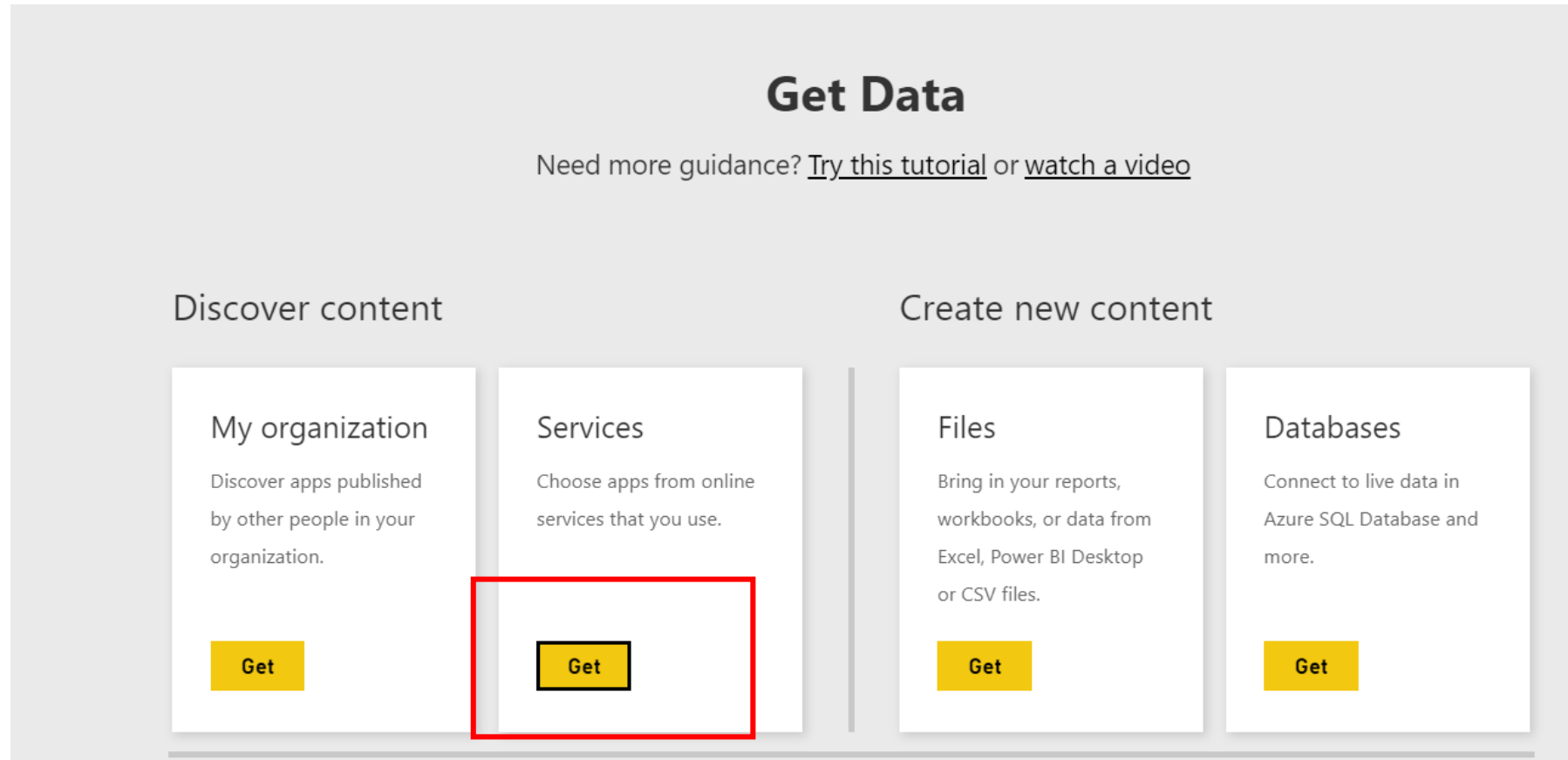
# Getting Started With Power BI and Dynamics CRM

- The easiest and most straightforward way to get data out of Dynamics CRM is to use a content pack. Below are steps that explain this more detail:
  1. Log into PowerBI.com
  2. Click on the "Get Data" icon on the lower left hand corner



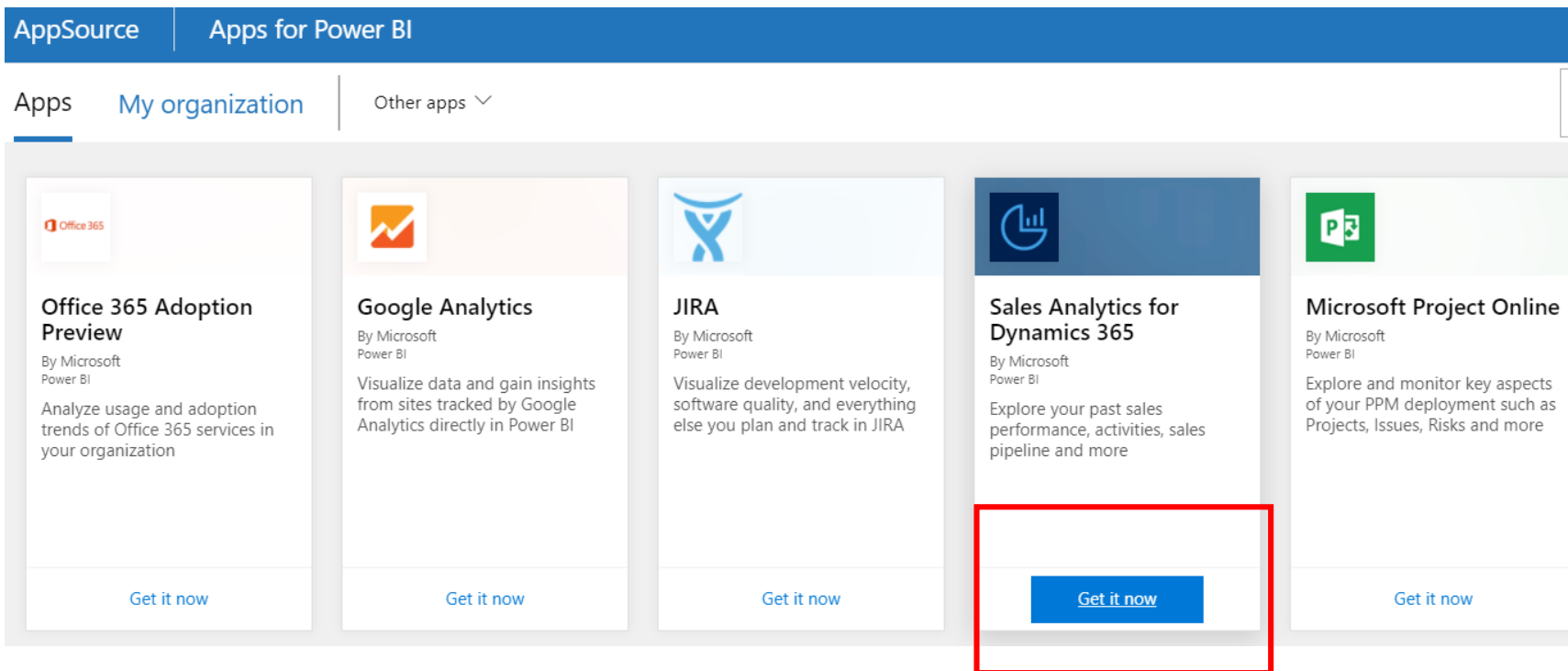
# Getting Started With Power BI and Dynamics CRM

2. Click on "Services" and search for "Sales Analytics for Dynamics 365."



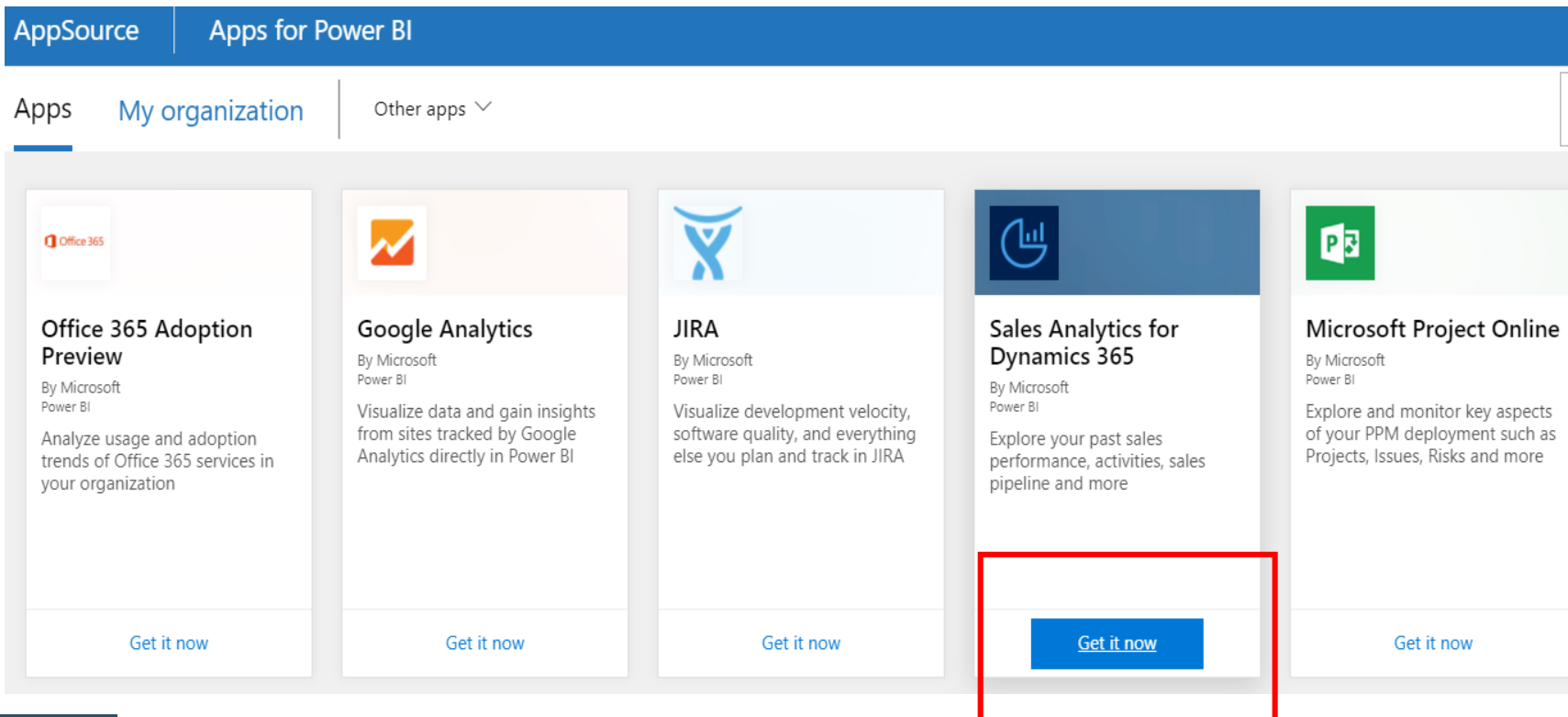
# Getting Started With Power BI and Dynamics CRM

3. Click on "Get it now" under "Sales Analytics for Dynamics 365."



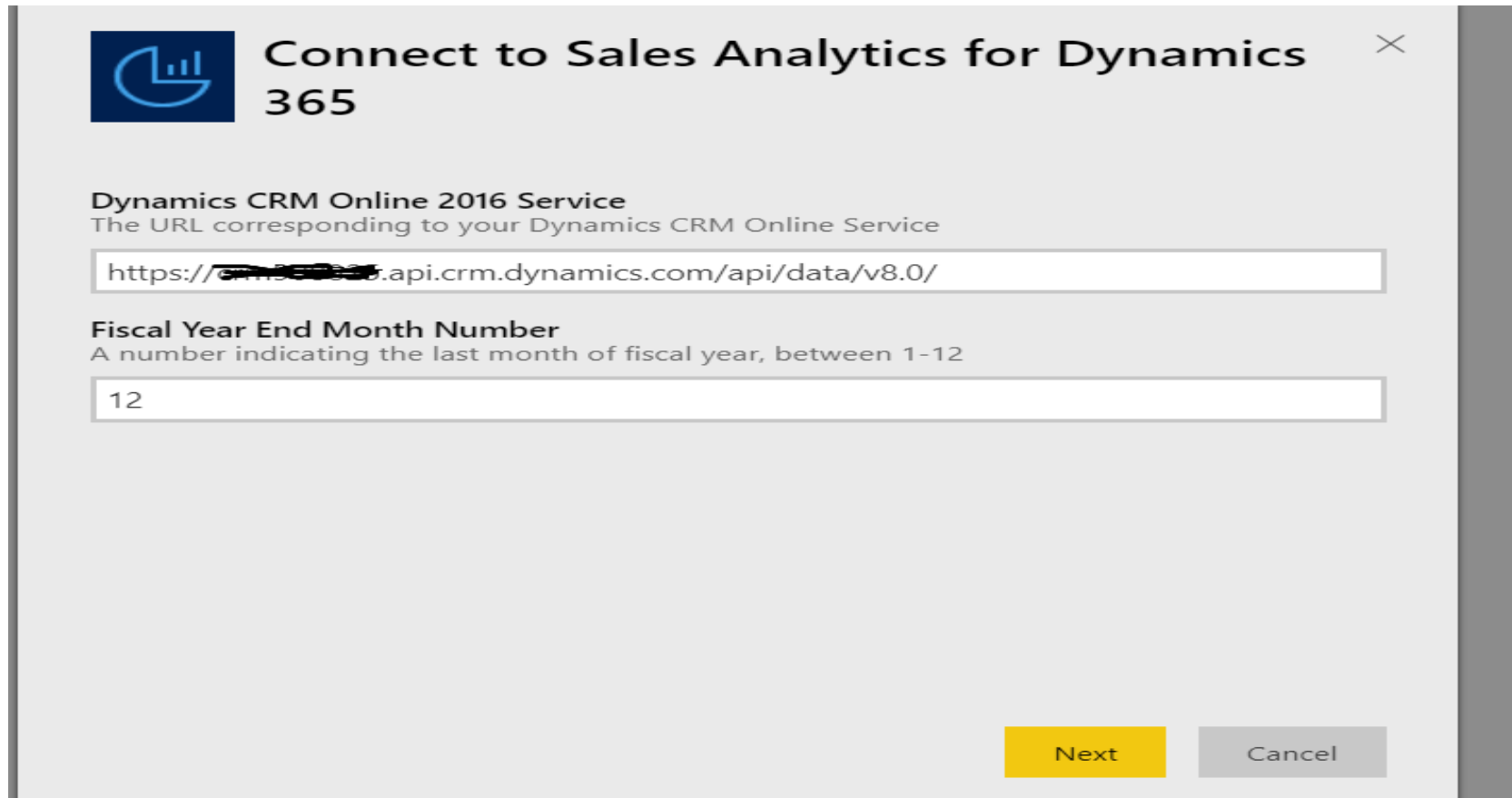
# Getting Started With Power BI and Dynamics CRM


3. Click on "Get it now" under "Sales Analytics for Dynamics 365" and click on "Get it now" again. This should bring you to a screen where you enter your Dynamics CRM URL and a Fiscal Year End Month Number



# Getting Started With Power BI and Dynamics CRM

4. Enter the URL and a month number as show below and click "Next." The URL usually looks like this:  
`https://[your company name].api.crm.dynamics.com/api/data/v8.0/`



 **Connect to Sales Analytics for Dynamics 365** ✕

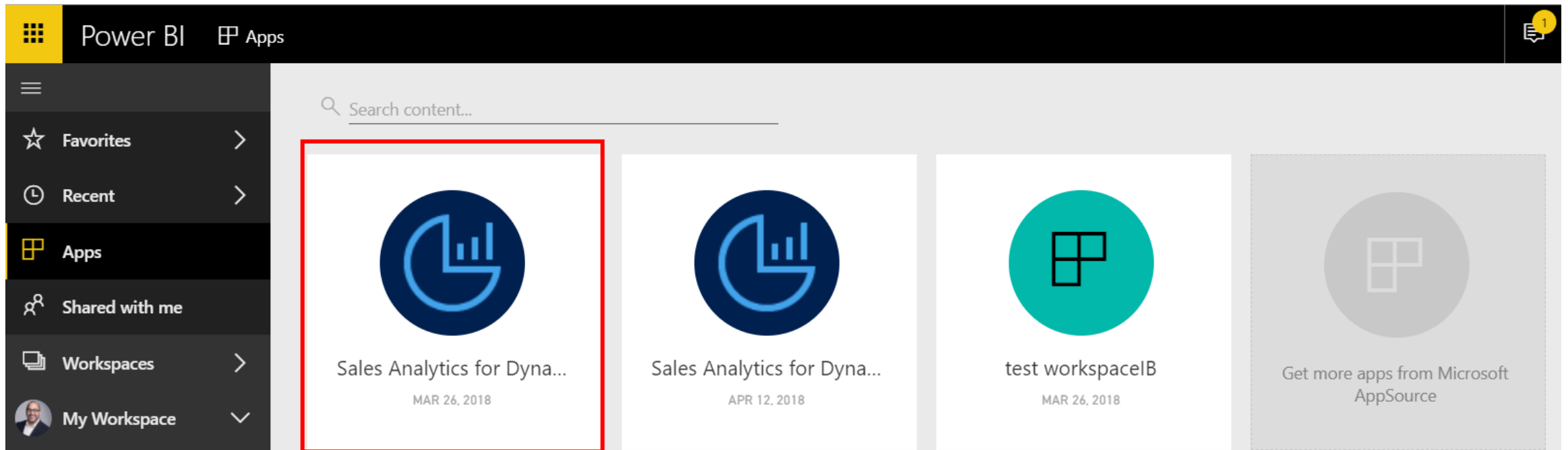
**Dynamics CRM Online 2016 Service**  
The URL corresponding to your Dynamics CRM Online Service

**Fiscal Year End Month Number**  
A number indicating the last month of fiscal year, between 1-12

**Next** **Cancel**

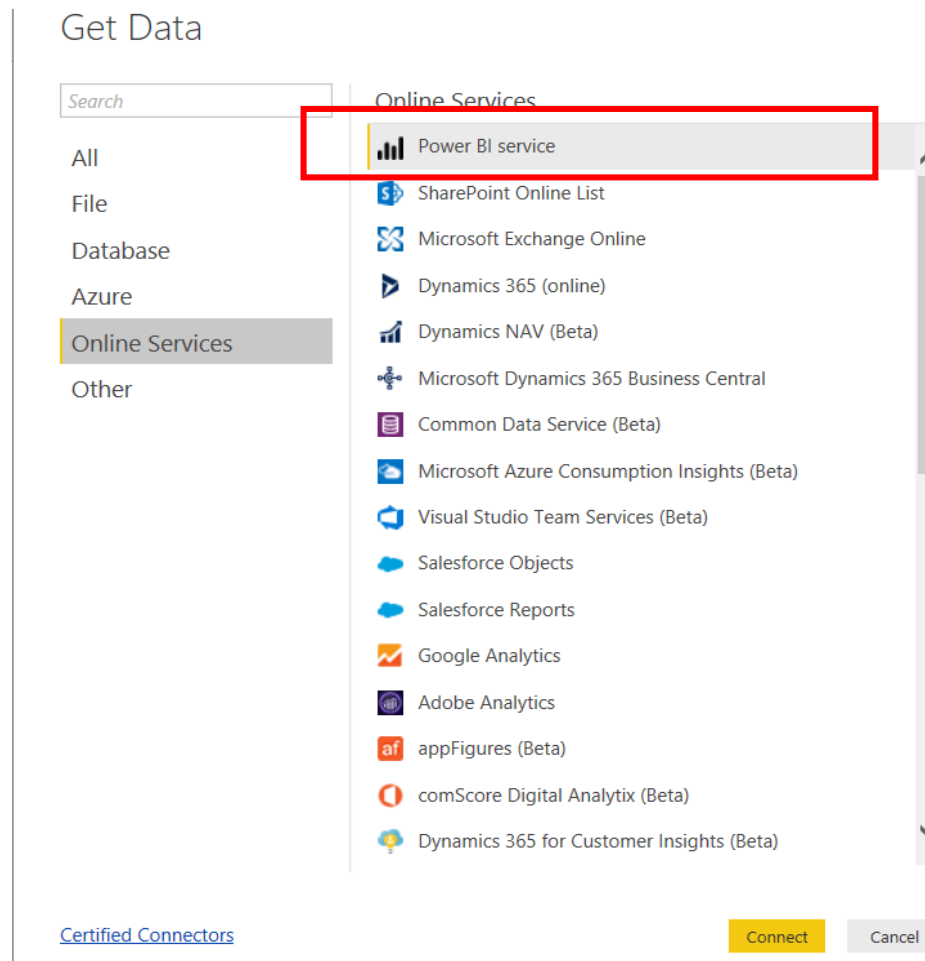
# Getting Started With Power BI and Dynamics CRM

5. Sign in using Authentication Method OAuth2 and enter your CRM login credentials. After you enter your credentials, the Power BI service will connect to CRM and download the content pack (data set, dashboard, and reports) as an App.



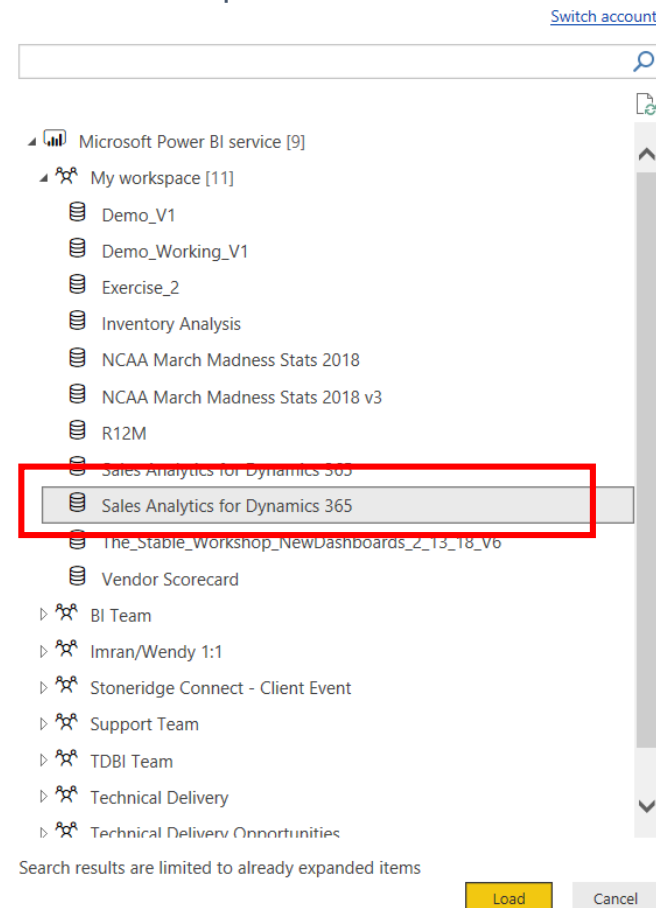
# Getting Started With Power BI and Dynamics CRM

6. If you want to start creating reports off of the data set you can open Power BI Desktop, click on "Get Data" and select "Power BI Service" under "Online Services".



# Getting Started With Power BI and Dynamics CRM

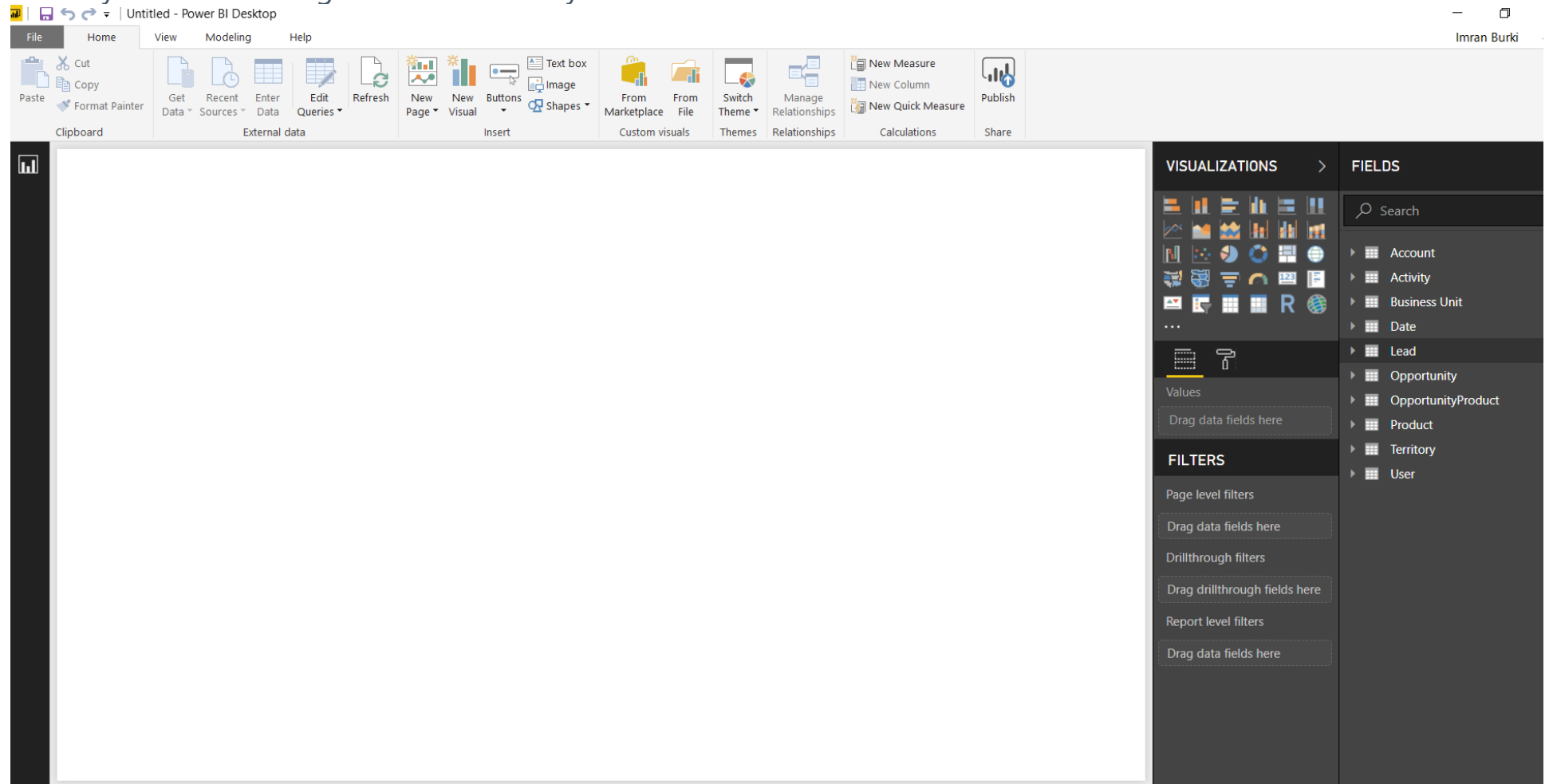
7. Navigate to the area where you deployed the content pack and look for the data set called "Sales Analytics for Dynamics 365" and click "Load" to import the data set in Power BI Desktop.





# Getting Started With Power BI and Dynamics CRM

That's it! Now you're ready to start creating dashboards with your CRM data.



A stylized logo graphic consisting of a dark grey line forming a right-angled triangle pointing upwards and to the right, with a white line extending from the right angle, also pointing upwards and to the right.

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Questions?

# What's Next?

## More Information?

Talk to us! Or contact your account manager or project manager

## Need Support?

[crmsupport@stoneridgesoftware.com](mailto:crmsupport@stoneridgesoftware.com)

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