

# BUILDING DYNAMICS CRM 2015 DASHBOARDS WITH POWER BI BY STEVE IVIE



## Building Dynamics CRM 2015 Dashboards with Power BI

Build interactive and analytical sales productivity dashboards for Dynamics CRM 2015 with Power BI

Steve Ivie

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About the Author

Steve Ivie

Steve Ivie is a Microsoft business solutions advisor and author. He is also the founder of DynShare ([www.dynshare.com](http://www.dynshare.com)), a learning and discovery site focused on business productivity, social collaboration, integrated solutions, and business analytics with Dynamics CRM and Office 365. For 15 years, Steve has been working on business technologies for industries such as finance, biopharmaceutical, healthcare, professional services, manufacturing, sports, and entertainment. He is one of the few people who have a principle-level consulting record and holds professional certifications in Dynamics CRM, Dynamics GP, SharePoint, and business intelligence. Steve is an active speaker of CRMUG and a facilitator at Microsoft Customer Immersion Experience (CIE). As a solution architect at Tribridge, he is responsible for building and presenting customized business solutions with Microsoft Dynamics CRM and Office 365, in addition to integrating Power BI and marketing Dynamics GP, Dynamics AX, and related ISV products.

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Build interactive and analytical sales productivity dashboards for Dynamics CRM 2015 with Power BI

## About This Book

- Create Dynamics CRM reports using Power BI for Office 365 and Power BI Designer
- Discover best practices to build and deploy these dashboards to Power BI sites and Dynamics CRM 2015
- Learn how to extend dashboard to mobile iPad and Surface Power BI apps

## Who This Book Is For

This book is intended for all Dynamics CRM 2015 users?administrators, managers, business analysts, or report writers who are new to creating dashboards using Power BI and Dynamics CRM. It would be helpful to have a basic knowledge of the Dynamics CRM 2015 platform, but no prior experience is required.

## What You Will Learn

- Organize and consolidate Dynamics CRM 2015 datasets
- Add summaries and visualizations using charts and maps
- Enhance data clarity with filters, slicers, timelines
- Improve analysis by joining other data sources
- Deploy and present the dashboard to Power BI for Office 365 site
- Use the advanced Q/A functionality with Power BI to query data in the dashboard graphs and charts
- Connect the dashboards to Dynamics CRM 2015
- Extend functionality with Power BI mobile apps

## In Detail

Dynamics CRM 2015 holds a wealth of information about customers and the sales pipeline, but sometimes leaves users with basic end-user reporting and dashboard options. Power BI is a great new tool for analyzing and presenting data, giving us the ability to dig deeper into the information. With the increased requests for real-time sales analytics, Power BI when connected to Dynamics CRM offers a self-service approach to build, shape, and present data through an easy-to-use interface. The set of features within Power BI will give all users a tool to generate real-time sales productivity reports and dashboards to enhance their sales performance.

This book will provide you with the skills you need to learn how to build and present Dynamics CRM 2015 sales dashboards using Power BI. It follows a step-by-step process to build an interactive dashboard by organizing and consolidating datasets, improving the look and feel of graphs, charts, and maps, and enhancing data clarity with filters and slicers.

By sequentially working through the steps in each chapter, you will learn how to use the Power BI Q/A

functionality to query data in the dashboard, extend the dashboards to the mobile apps for the iPad and Surface, and leverage the pre-built workbook template provided by Microsoft for Dynamics CRM 2015 sales, service, and marketing dashboards.

## Style and approach

A step-by-step approach to building a Power BI driven Dynamics CRM dashboard explained in an easy-to-follow style. Each topic is explained sequentially in the process of creating a dashboard, and detailed explanations of the basic and advanced features of Power BI and Dynamics CRM that appeal to the needs of readers with a wide range of experiences are also included.

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## About the Author

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## Most helpful customer reviews

1 of 1 people found the following review helpful.

Very good tutorial on PowerBI

By MrBlackstone

This is an outstanding book covering the one of the newest technologies from Microsoft that's creating a buzz. This is well structured and clearly presented, and is an excellent tutorial for those starting out with PowerBI. It provides clear, step-by-step instructions on how to use all of the features of PowerBI, and highlights the exciting features that make for a compelling dashboard or analytic. It's packed with a lot of content, and the eBook version makes this even easier to use as a reference. The examples used are not limited to CRM though - other examples are used as well, making it much more rounded. Overall, Steve Ivie does an excellent job of distilling a tremendous amount of information about this new product into an easy-to-follow and very digestible format, and providing a clear picture of how, and where, this technology can add value.

1 of 1 people found the following review helpful.

Very practical guide - can apply what I've learned ASAP.

By J. Noble

Superb book for a wide ranging audience as the book outlines in the preface. The book does a great job of breaking down how to build a sales productivity dashboard in a way that's easy to follow. Lots of visuals and step-by-steps! The way 'warnings' and 'tips and tricks' are called out make them easy to spot and refer back to. I especially liked the section on combining CRM and ERP data and building a combined Customer Health Report to include in the sales productivity dashboard.

0 of 0 people found the following review helpful.

This is a fantastic book for novices and experts alike.

By JMccaffrey

This is a fantastic book for novices and experts alike. I was working on a project that actually required me show Power BI Dashboard on a CRM Dashboard. Up until then, I was using SSRS reports which did not really capture the fully picture. This is the only book that I found that was 100% useful. keep it up.

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