UNLOCK YOUR CUSTOMER DATA

CRM & POWER PLATFORM CUSTOMER DAY 2023

Introduction to Power BI

WEDNESDAY 26 APRIL 2023

Hi!
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What we'll cover

1. Introduction to Power BI

2. Connection to CRM

3. Sales Reporting Essentials

4. How to get started with Power BI and CRM

5. Dashboard integration in BC and CRM
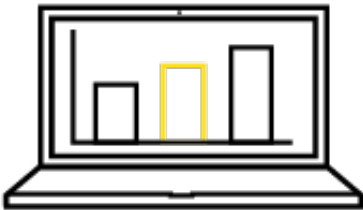
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Introduction to Power BI

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What is Power BI?
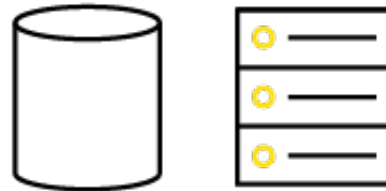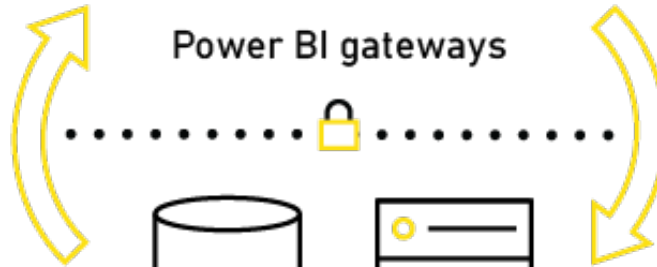
Desktop, Service and Mobile

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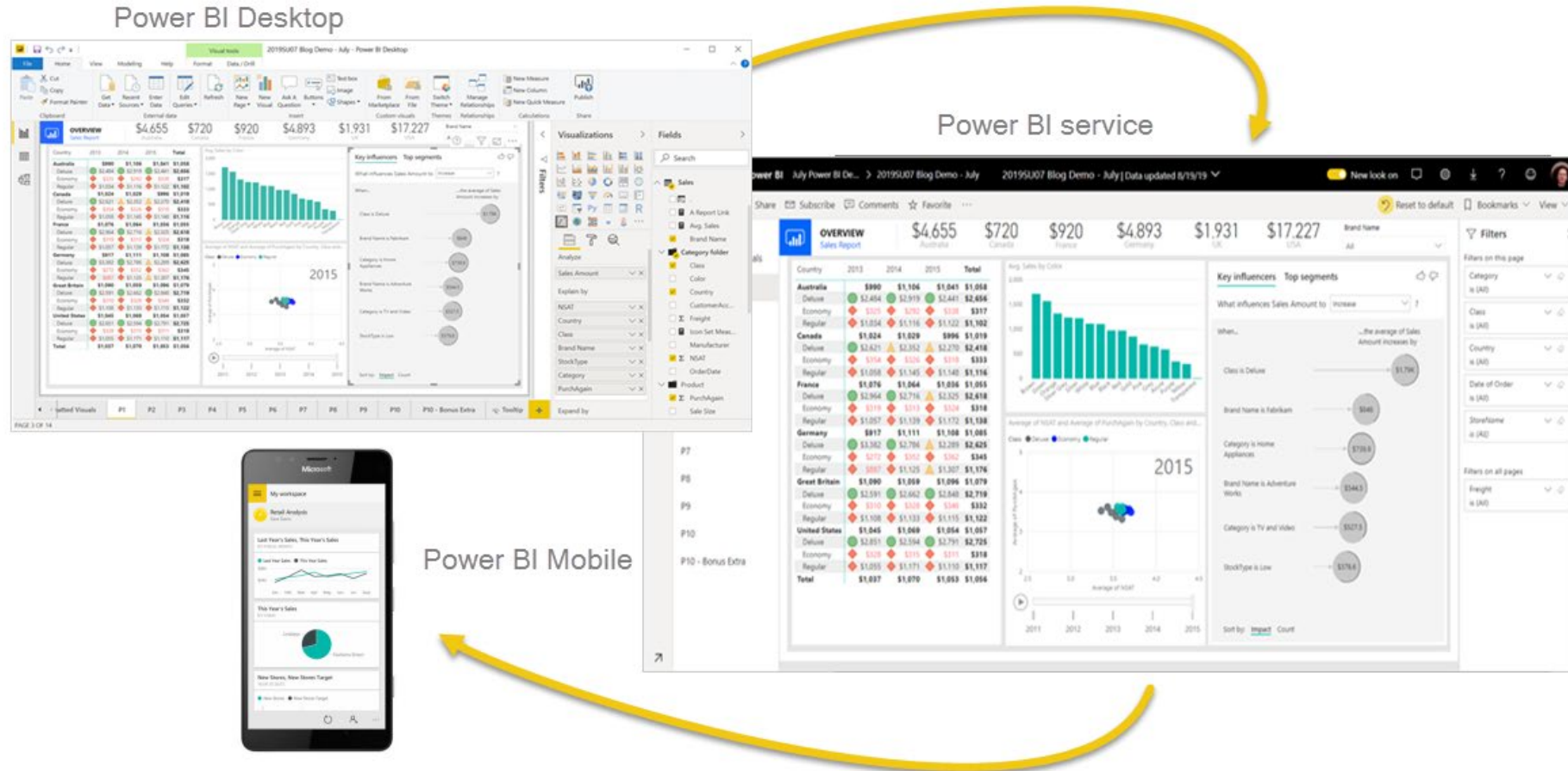
License types

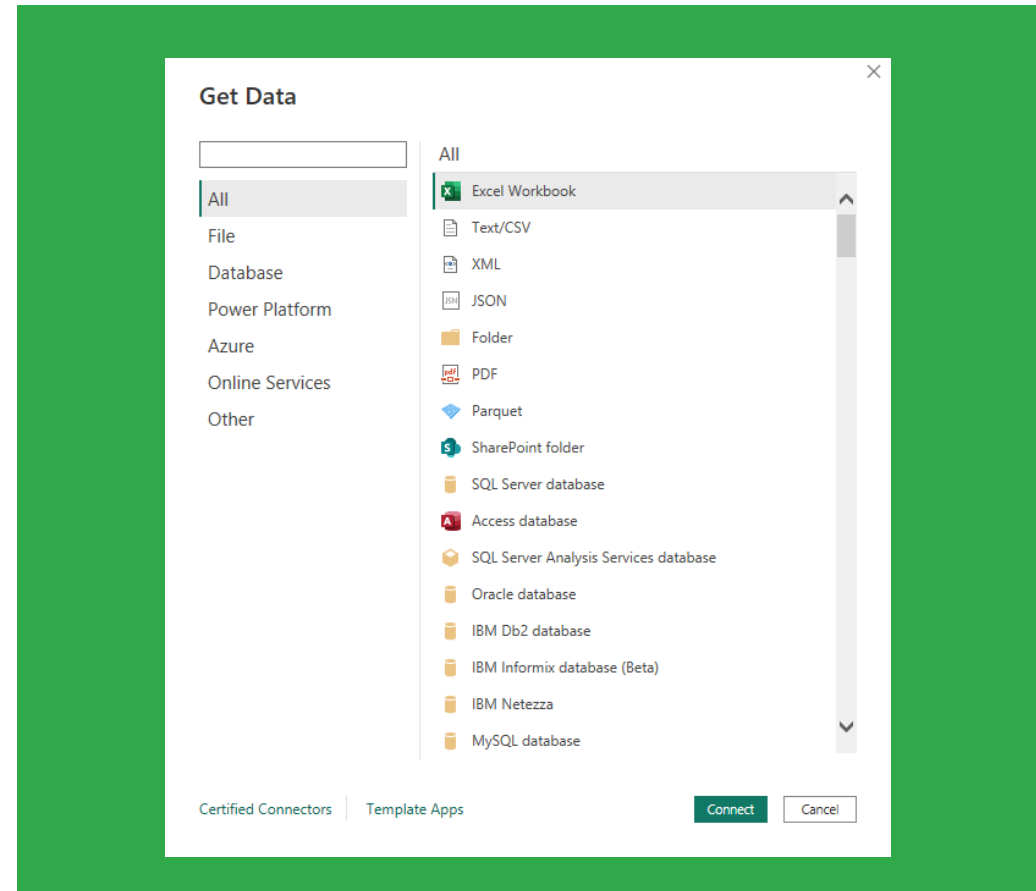| Features	Power BI Free	Power BI Pro	Power BI Premium
Space allocation	1GB	10GB *	100 TB
Power BI Desktop	✓	✓	✓
Development features	✓	✓	✓
DirectQuerv	-	✓	✓
Gateways	-	✓	✓
Row- level security	-	✓	✓
Content pack	-	✓	✓
Work spaces	-	✓	✓
Data streaming	up to 10K rows per hours	unlimited	unlimited
Dataset refresh frequency	up to once a day	up to 8 times a day	Up to 48 times a day

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Connectors

Other connections

- Hundreds of different connectors
- Can be linked to more than one source

CRM Connection

- Inbuilt connector in Power BI
- API connection is required (https://tecmancrm.crm4.dynamics.com/api/data/v9.2)

Get Data

All

All		All
File		Excel Workbook
Database		Text/CSV
Power Platform		XML
Azure		JSON
Online Services		Folder
Other		PDF
		Parquet
		SharePoint folder
		SQL Server database
		Access database
		SQL Server Analysis Services database
		Oracle database
		IBM Db2 database
		IBM Informix database (Beta)
		IBM Netezza
		MySQL database

Certified Connectors | Template Apps

Connect | Cancel

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Power BI Concepts

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Workspaces

Apps

Power Query "M" Language and DAX

M Query

DAX

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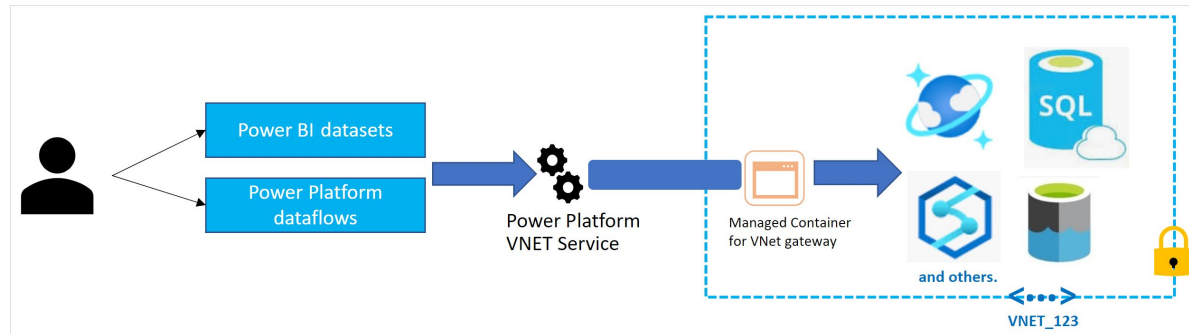# Dataflows and Datasets

Dataflows

- Unify data from different sources
- Usually used in larger and more complex projects

Datasets

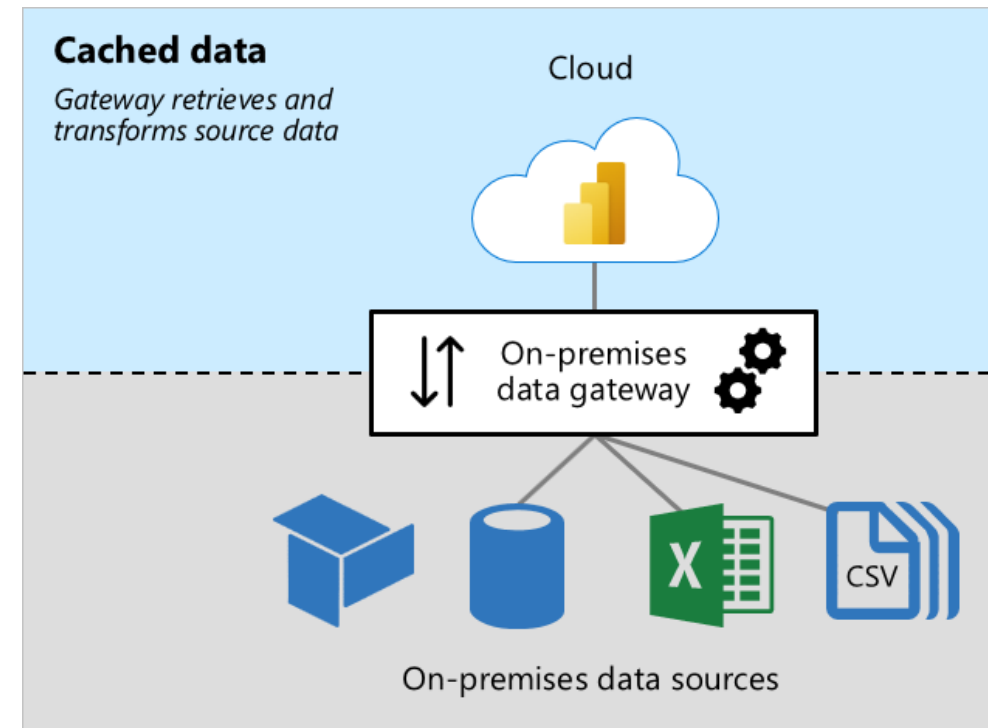- Collection of data that you import or connect to
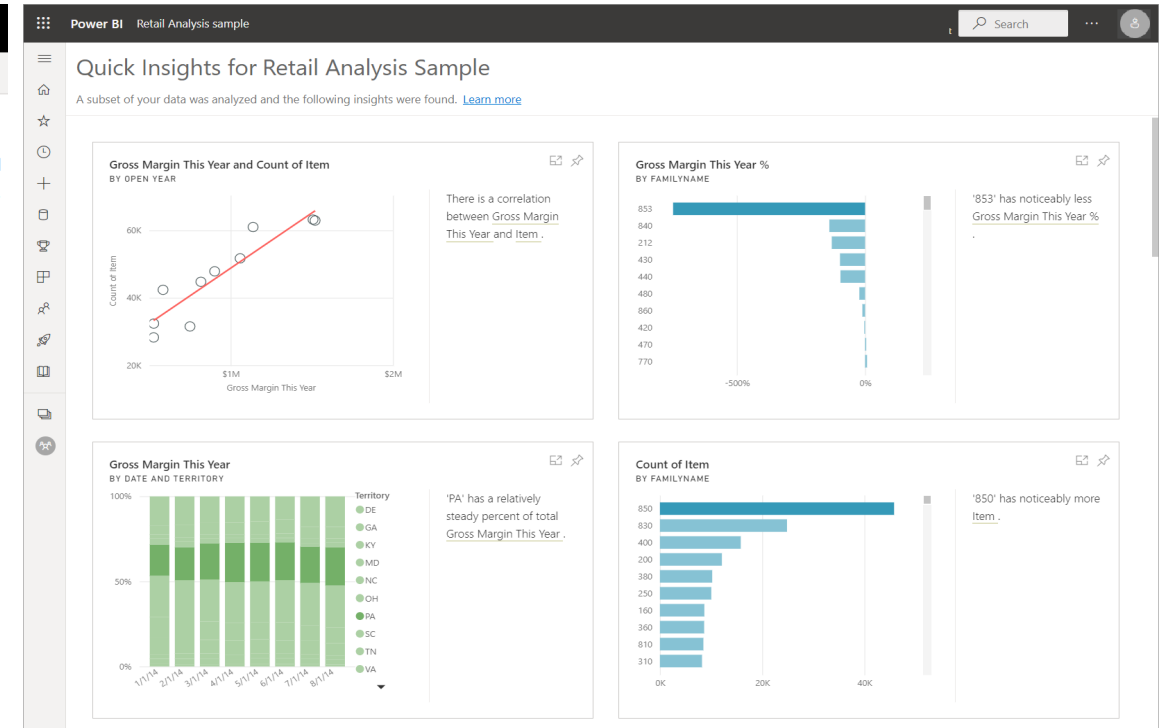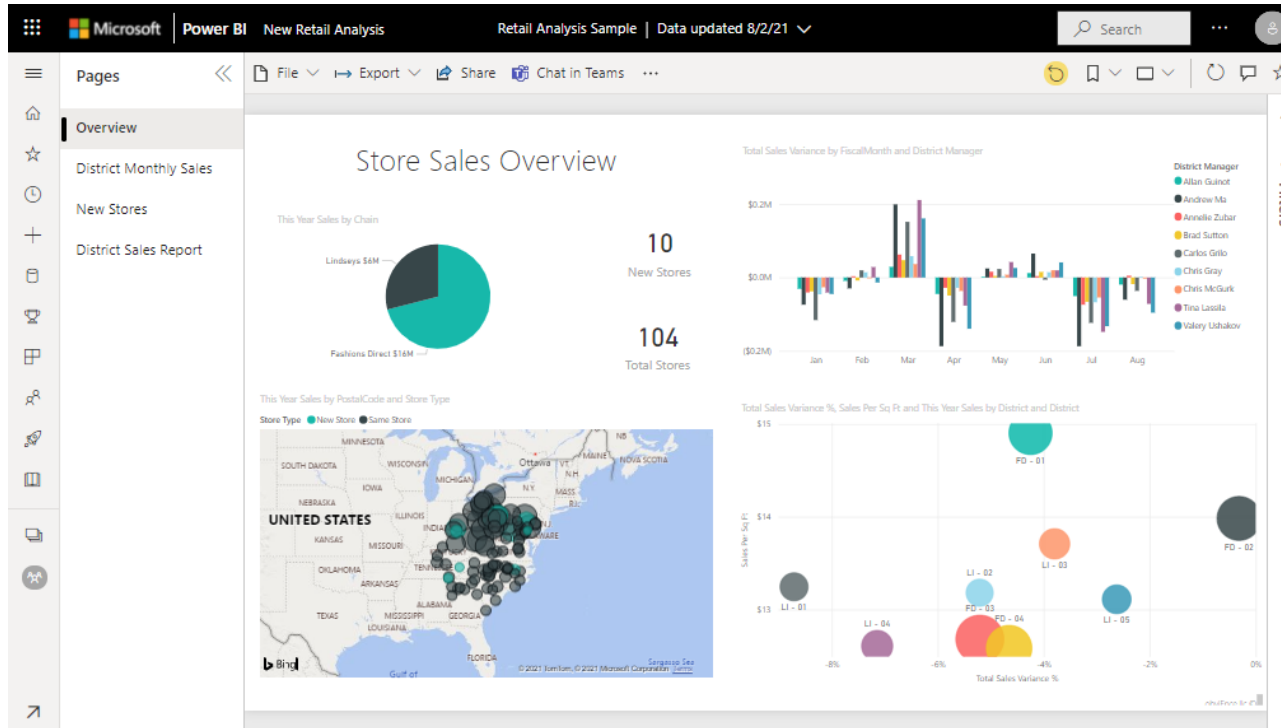- Can source data from dataflows

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Gateways

On-Prem

Virtual Network

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Reports

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Dashboards

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How to connect PBI to CRM

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Reporting strategies and tips

Start with a good foundation

- Have a clear idea of what you want to achieve.

- Have a well-defined scope – work backwards!

- Map out relationships
  - For BC: *Dynamicsdocs.com*
  - Understand your data structures
  - Importance of GUIDS (will always have value in the name)

Sharing reports

- Individual reports

- Apps

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Want to learn more?

- **Power BI training sessions**
  - Please speak to your Customer Engagement Manager for more information.

- **Power BI Video Playlist:**
  - https://www.youtube.com/playlist?list=PLoS7gV-LINmICwUJHdcko0Q8gWp-F6wQi

- **Licensing Comparison:**
  - https://powerbi.microsoft.com/en-us/pricing/#powerbi-comparison-table

- **Power BI samples:**
  - https://learn.microsoft.com/en-us/power-bi/create-reports/sample-datasets

Thank you.

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