

UNLOCK YOUR CUSTOMER DATA

CRM & POWER PLATFORM CUSTOMER DAY 2023

Introduction to Power BI



Hi!
Natalie Tsang

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



Introduction to Power BI

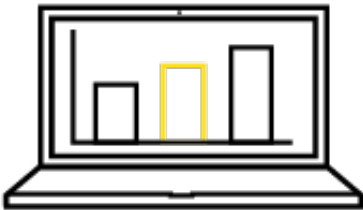
What is Power BI?

Hundreds of data sources



CONNECT

Power BI Desktop



PUBLISH

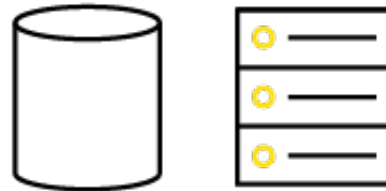
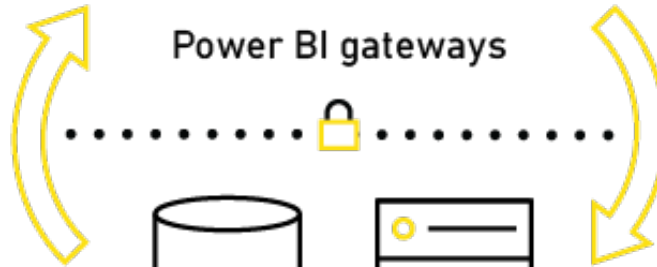
Power BI service



ACCESS

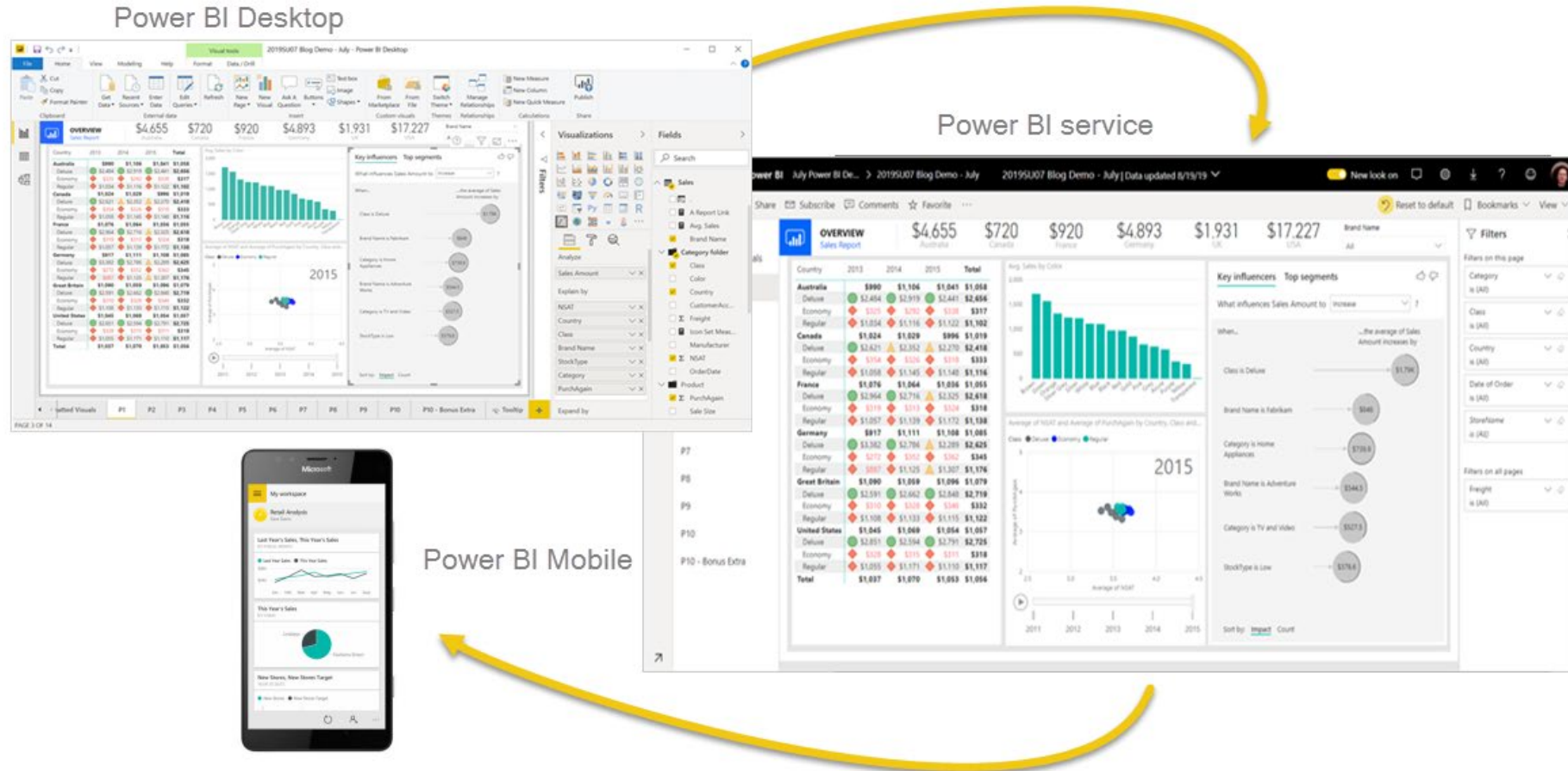


Power BI gateways



YOUR ORGANIZATION'S DATA

Desktop, Service and Mobile



License types

Features	Power BI Free	Power BI Pro	Power BI Premium
Space allocation	1GB	10GB *	100 TB
Power BI Desktop	✓	✓	✓
Development features	✓	✓	✓
DirectQuery	-	✓	✓
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

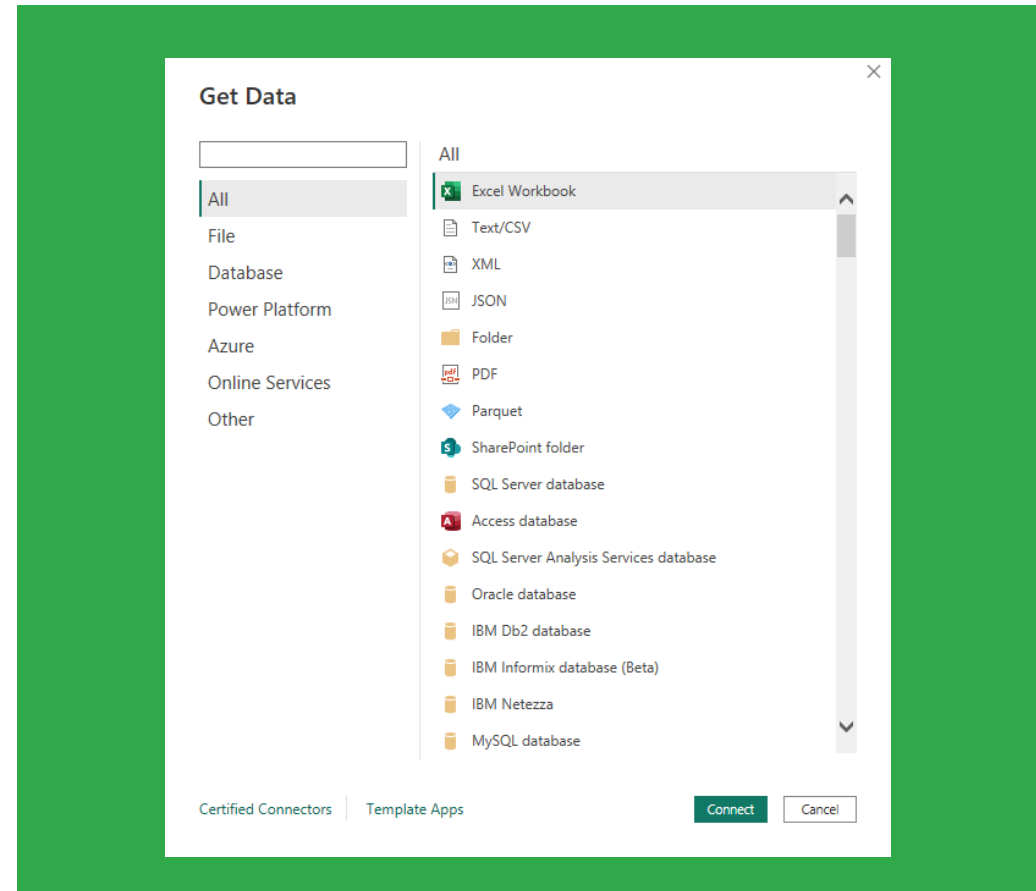
Connectors

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>)



Power BI Concepts

Workspaces

Power BI My workspace

PPU Trial: 41 days left Search

My workspace

+ New Upload

View Filters Search

All Content Datasets + dataflows

Name	Type	Owner	Refreshed	Next refresh	Endorsement	Sensitivity
Production Business Central Top Items Sold by Qua...	Report	Natalie Tsang	24/04/23, 09:52:33	—	—	—
Production Business Central Top Items Sold by Qua...	Dataset	Natalie Tsang	24/04/23, 09:52:33	N/A	—	—
Sales Reporting Pack - New	Report	Natalie Tsang	24/04/23, 09:39:25	—	—	—
Sales Reporting Pack - New	Dataset	Natalie Tsang	24/04/23, 09:39:25	25/04/23, 09:00:00	—	—
Sales Reporting Pack - New.pbix	Dashboard	Natalie Tsang	—	—	—	—

Apps

Power BI Apps

Search

Get apps

View Filter by keyword Filter

Name	Publisher	Published	App type	Version	Endorsement ↑
Customer Service Analytics for Dynamics 365	Natalie Tsang	18/04/23, 15:36:17	Template app	Version 10	—
Sales Analytics for Dynamics 365 Sales	Natalie Tsang	24/04/23, 13:39:22	Template app	Version 25	—
BC Telemetry - Cloud Control	TM PowerBIService	16/03/23, 13:48:25	Org app	—	—
BC Telemetry - Non Cloud	TM PowerBIService	17/02/23, 15:25:01	Org app	—	—
Google Analytics	Natalie Tsang	02/09/22, 15:24:35	Template app	Version 43	—
LinkedIn Sales Navigator Analytics Integration 02/0...	Natalie Tsang	02/09/22, 15:27:17	Template app	Version 10	—
Sales and Marketing sample 11/08/2021 10:08:48	Natalie Tsang	11/08/21, 10:08:58	Template app	Version 14	—
Tecman Telemetry	TM PowerBIService	01/03/23, 09:57:04	Org app	—	—

Power Query "M" Language and DAX

M Query

Custom Column

Add a column that is computed from the other columns.

New column name

Sales Price Bracket

Custom column formula

```
= if [Sales Price] <= 10
then
"less than 10"
else if [Sales Price] <= 20
then
"less than 20"
else "greater than 20"
```

Available columns

Product ID
Cost Price
Sales Price
Gross Margin

<< Insert

[Learn about Power BI Desktop formulas](#)

✓ No syntax errors have been detected.

OK

Cancel

DAX

The screenshot shows the DAX formula bar in Power BI Desktop. The name of the measure is "Measure". The home table is also "Measure". The formula is: `1 Measure = CALCULATE(SUM('Credit Memo Lines'[Amount]))`. The description of the function is "Evaluates an expression in a context modified by filters." The data category is "Uncate".

Dataflows and Datasets

Dataflows

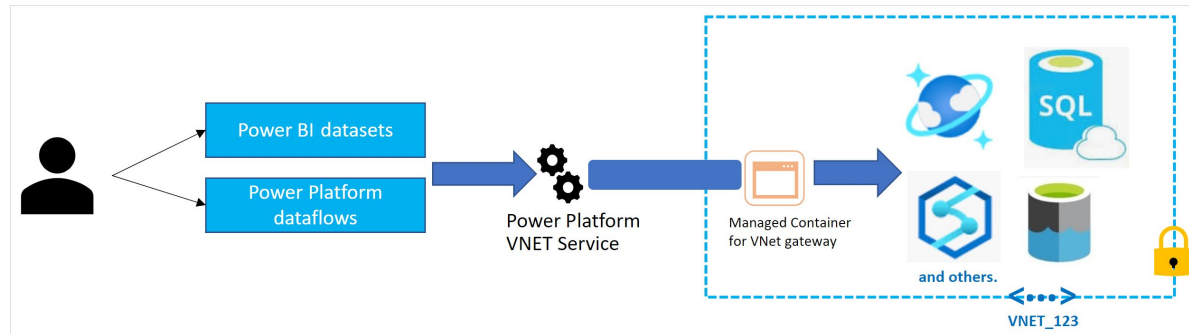
- Unify data from different sources
- Usually used in larger and more complex projects

Datasets

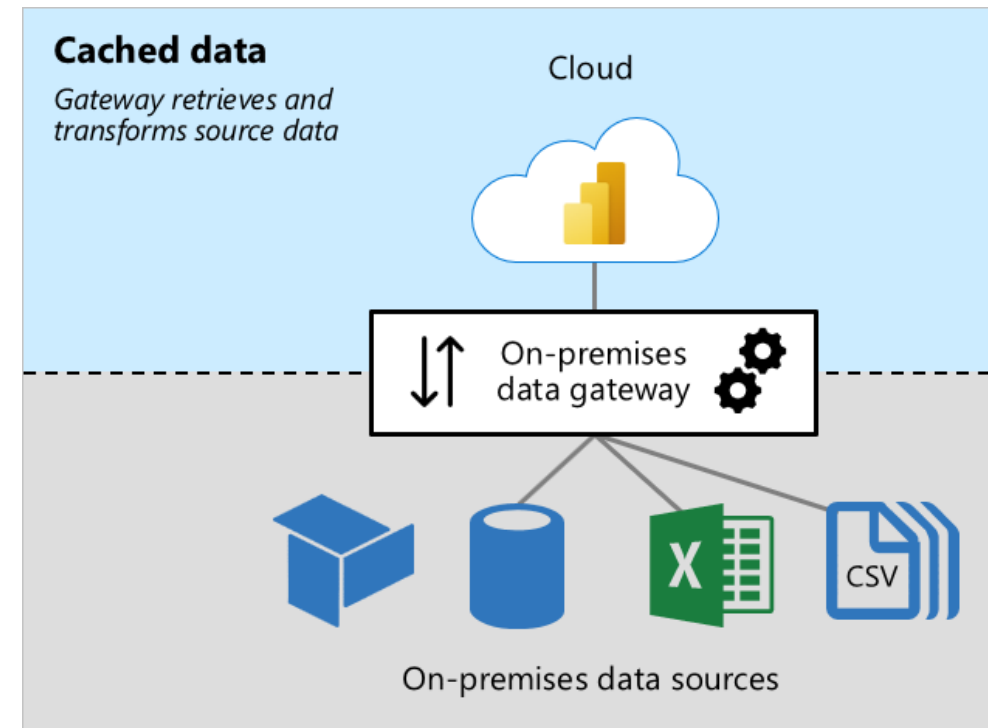
- Collection of data that you import or connect to
- Can source data from dataflows

Gateways

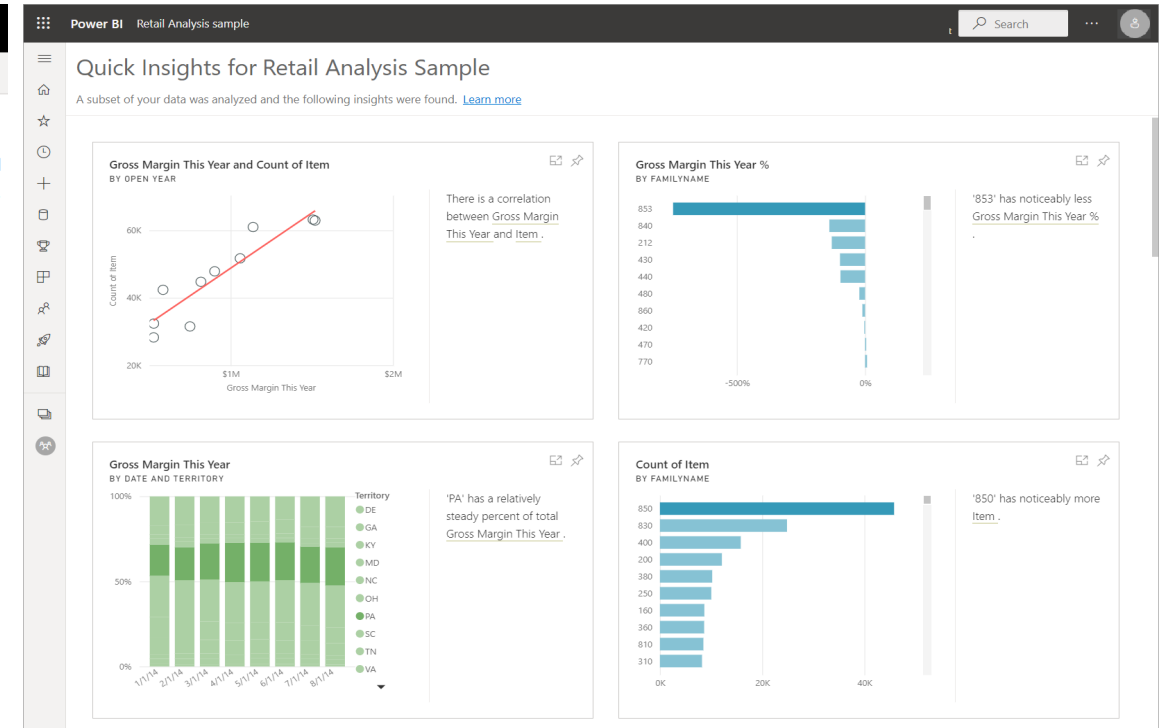
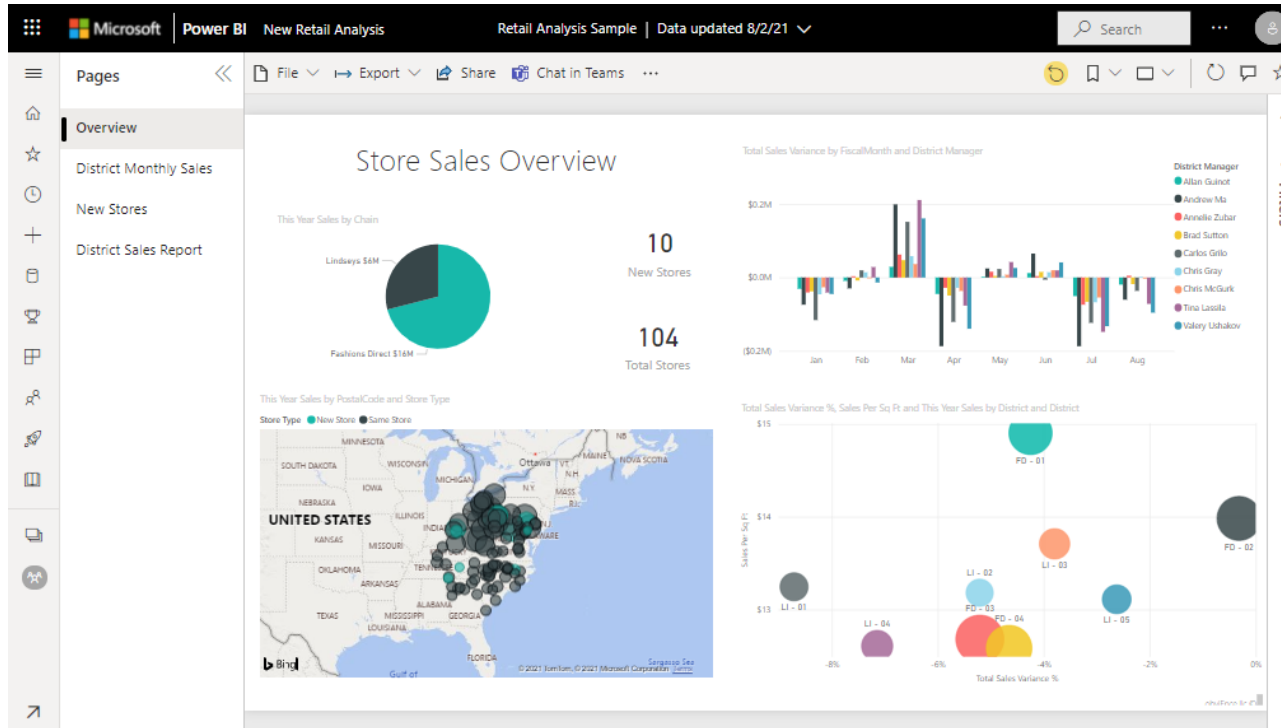
Virtual Network



On-Prem



Reports



Dashboards



How to connect PBI to CRM

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

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-LINmlCwUJHdcko0Q8gWp-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>



Power BI

with

Microsoft Dynamics 365 Business Central
& Dynamics NAV



Dynamics Learning

Thank you.

