

UNLOCK YOUR CUSTOMER DATA

# CRM & POWER PLATFORM CUSTOMER DAY 2023

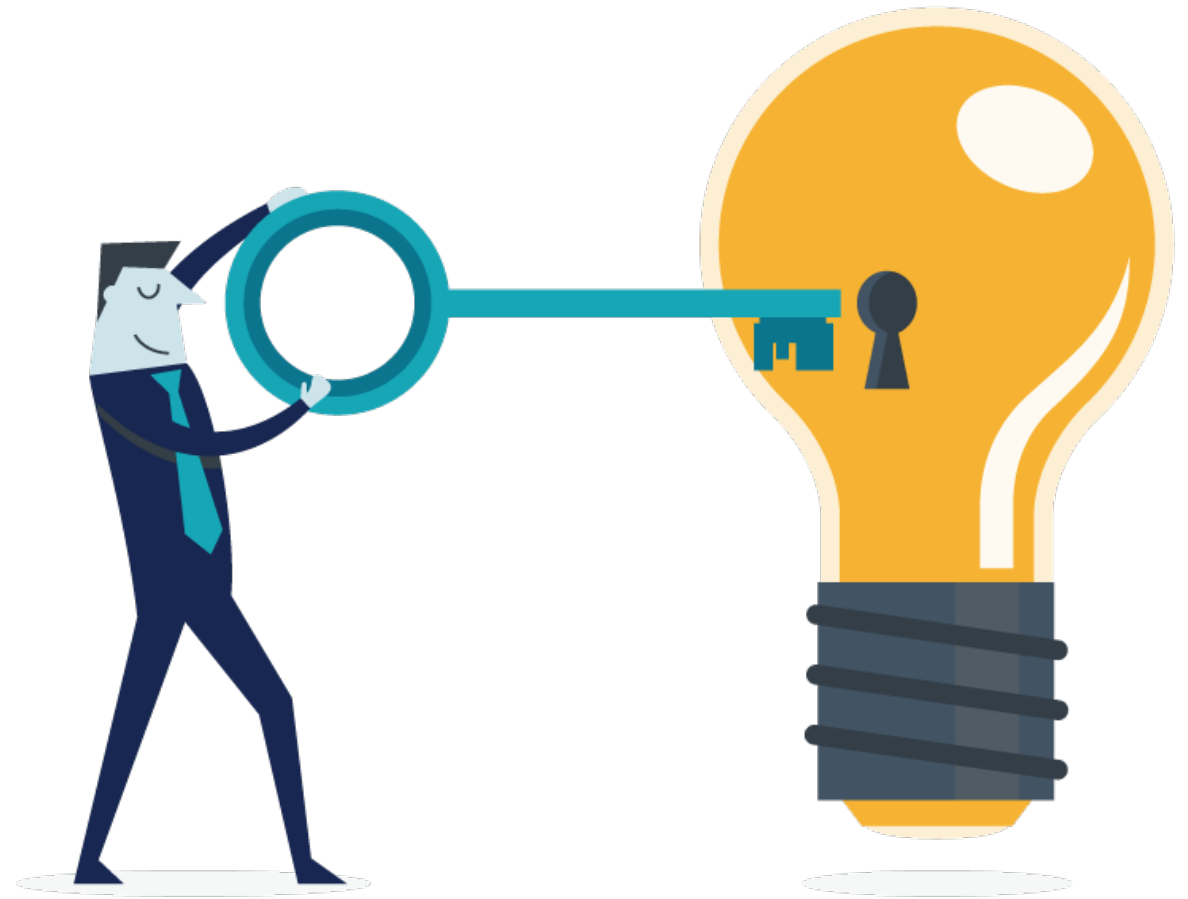
Power BI – Sales Dashboards



Hi!  
Natalie Tsang

# What we'll cover

1. Introduction to Power BI
2. Sales Reporting Essentials
3. Microsoft AppSource Apps
4. Connecting CRM to Power BI
5. Sharing and Embedding reports



# Introduction to Power BI

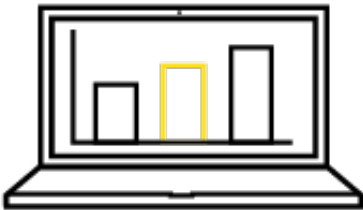
# What is Power BI?

Hundreds of data sources



CONNECT

Power BI Desktop



PUBLISH

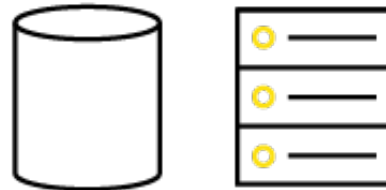
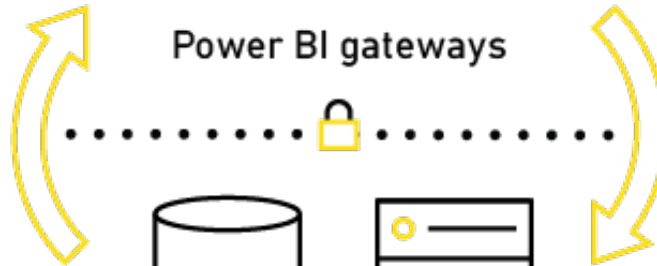
Power BI service



ACCESS

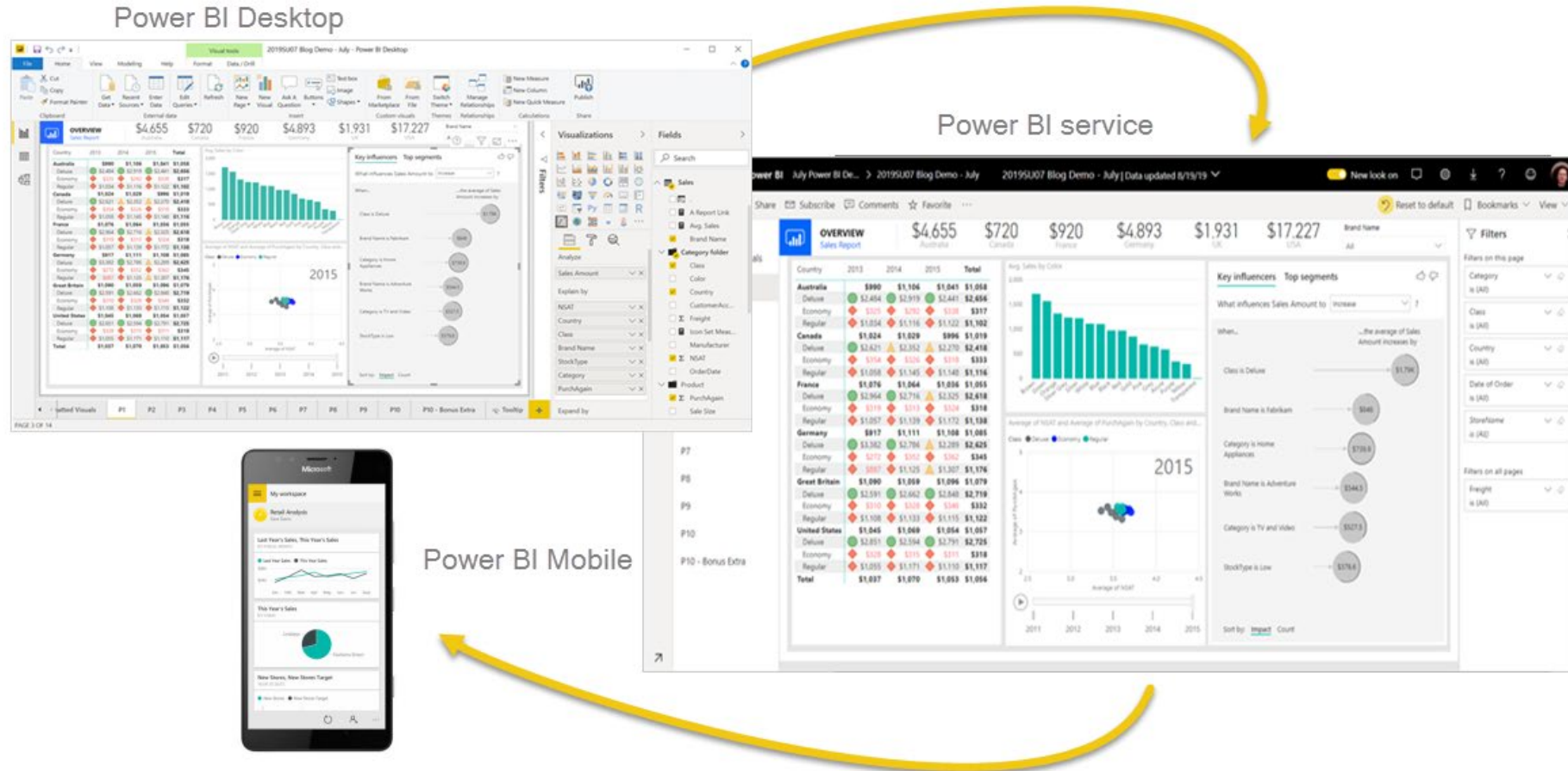


Power BI gateways



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

# Sales Reporting Pack

## Tables included in app:

Dimension Customer
Dimension Item
Dimension Location
Fact Sales Invoice Line
Fact Sales Invoice Header
Dimension Salesperson
Dimension Value Entry
Fact Credit Memo Line
Fact Credit Memo Header
Dimension Resource
Dimension GL Account
Dimension Item Budget Entry
Dimension DimensionSet
Dimension Item Attribute Value Mapping
Dimension Item Attribute Value
Dimension Item Attribute

Install App in BC environment

Connect the Sales Report to your data

Report handover



# Microsoft AppSource Apps

## Customer Service Analytics for Dynamics 365 and Sales Analytics for Dynamics 365 Sales

[Business Apps – Microsoft AppSource](#)

# Power BI Desktop Connection to CRM

# Share and embed dashboards to BC and CRM

The image displays two screenshots related to Dynamics 365 Business Central. The left screenshot shows the main interface for 'CRONUS UK Ltd.' with a navigation bar and a 'Power BI Report' section under 'Insights' that is highlighted with an orange border. The right screenshot shows the 'Admin portal' settings for 'Publish to web', which is currently enabled for the entire organization.

**Dynamics 365 Business Central Interface:**

- Header: Dynamics 365 Business Central
- Organization: CRONUS UK Ltd.
- Navigation: Production Orders, Sales & Purchases, Journals
- Dashboard: Demand Forecast, Transfer Orders, Open Current Ti... Sheet
- Section: Insights
- Section: Power BI Report (highlighted with an orange border)
- Text: There are no enabled reports.
- Link: Select reports

**Admin portal Settings:**

- Section: Publish to web (Enabled for the entire organization)
- Description: People in your org can publish public reports on the web. Publicly published reports don't require authentication to view them.
- Text: Go to [Embed Codes](#) in the admin portal to review and manage public embed codes. If any of the codes contain private or confidential content remove them.
- Text: Review embed codes regularly to make sure no confidential information is live on the web. [Learn more about Publish to web](#)
- Toggle:  Enabled
- Section: Choose how embed codes work
- Options:  Only allow existing codes,  Allow existing and new codes
- Section: Apply to:
- Options:  The entire organization,  Specific security groups,  Except specific security groups
- Buttons: Apply, Cancel

# 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.**

