Dynamic Dashboards: Making the most out of Dashboards with XrmToolBox, and embedded PowerBI and SSRS

live.dynamicscon.com

Dana Service

Microsoft Certified Professional

Solution Architect

Stoneridge Software
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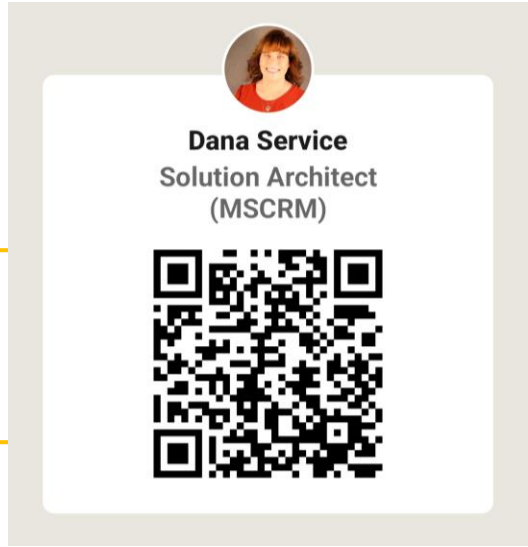
Microsoft® Certified: Dynamics CRM
User Group Leader – Arizona

16 years in Dynamics CRM:
D365 Power Platform
2011, 2016 CRM On Prem
D365 Online CRM for Sales, Customer Service, Marketing, and Field Service



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MAY 2024

Agenda

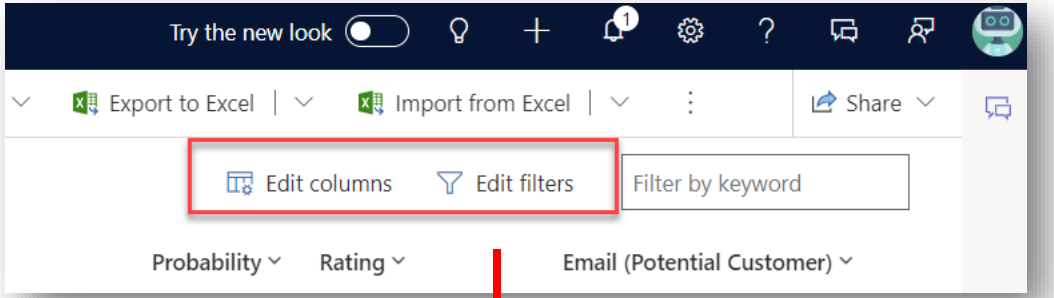
- Comparing Personal vs System Views, Charts & Dashboards
- Creating Personal Views/Graphs/Power BI visualizations based on Views
- Creating Admin Views, Charts and Dashboards in PowerApps
- Embedded PowerBI in dashboards
- Upgrading charts with XRM ToolBox
- The case for SSRS

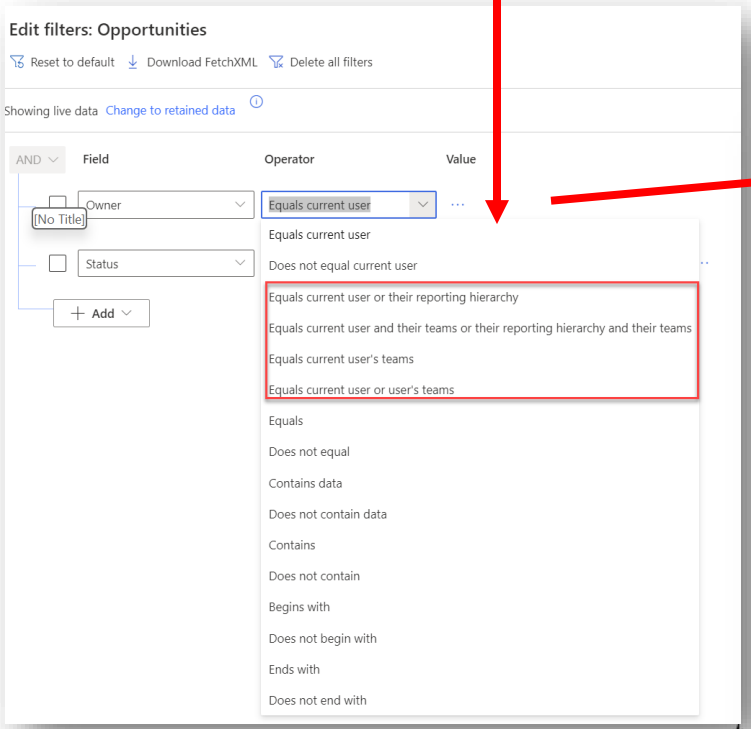
Out of the Box Views, Charts and Dashboards

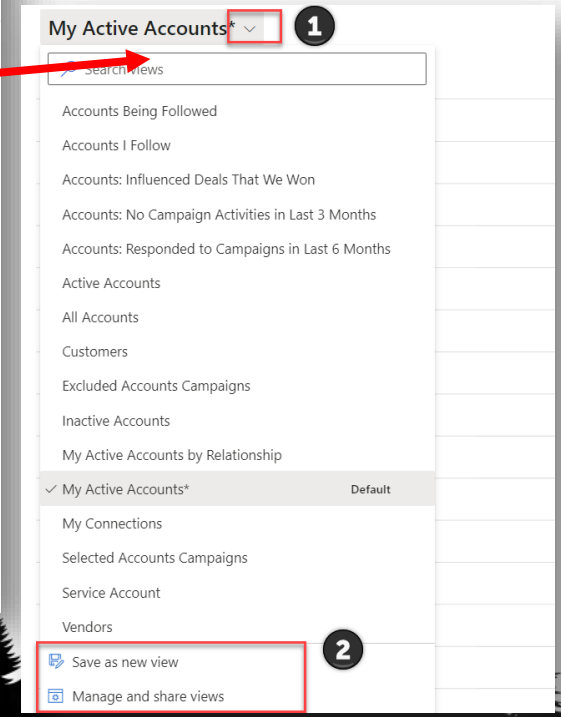
Personal Views, Charts and Dashboards		System Views, Charts and Dashboard	
Value Add	**Detractors**	**Value Add**	**Detractors**
Quick and easy – don't have to wait for someone else	People leave the company – requires tool to access and update *set up ownership to a Master or admin account	Teams working with different data across the Org/dataverse - customize to roles/access by roles and apps	Permissions can lock some dashboard views/graphs
Excellent repetitive search technique	Limitations based on 1: N and N:N relationships and knowledge transfer/training *Build multiple views to meet the "Or" statement	Sharing with large groups is automatic - Allows low to mid end users to be up and running with minimal time *training on personal creation can come later	Requires admin to create and manage *Share with the admin so they can create an exact match
Sharable/customizable	Variations of data/reporting based on skill – access is manual and time-consuming – Dashboard is a sum of parts *Manually add users to all parts	Ready for all users to access with the same information and availability	Not everyone will be happy

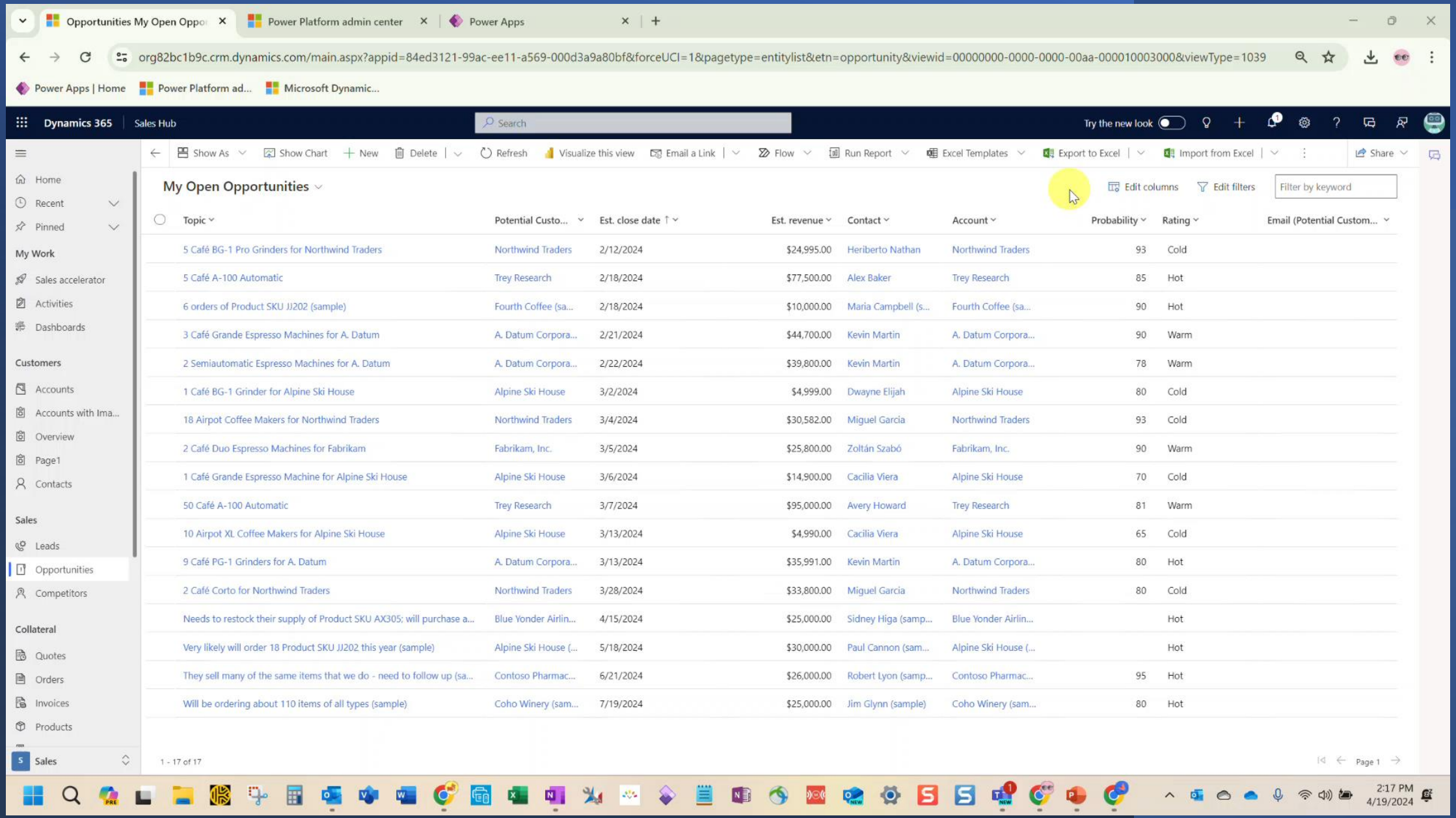
Personal Views

- Creating Personal Views
  - Give Users Freedom to adapt the system to their needs quickly and with no coding
  - Require sharing- (create a team)
  - Editing Filters
    - Limitation - having multiple tables in “Or” statements
  - Editing Columns
    - Limitation – 1:N and N:N Relationships








Opportunities My Open Oppo
Power Platform admin center
Power Apps
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Power Apps | Home
Power Platform ad...
Microsoft Dynamic...
Dynamics 365
Sales Hub
Search
Try the new look
Show As
Show Chart
New
Delete
Refresh
Visualize this view
Email a Link
Flow
Run Report
Excel Templates
Export to Excel
Import from Excel
Share
Home
Recent
Pinned
My Work
Sales accelerator
Activities
Dashboards
Customers
Accounts
Accounts with Ima...
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Sales
Leads
Opportunities
Competitors
Collateral
Quotes
Orders
Invoices
Products
Sales
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Edit filters
Filter by keyword
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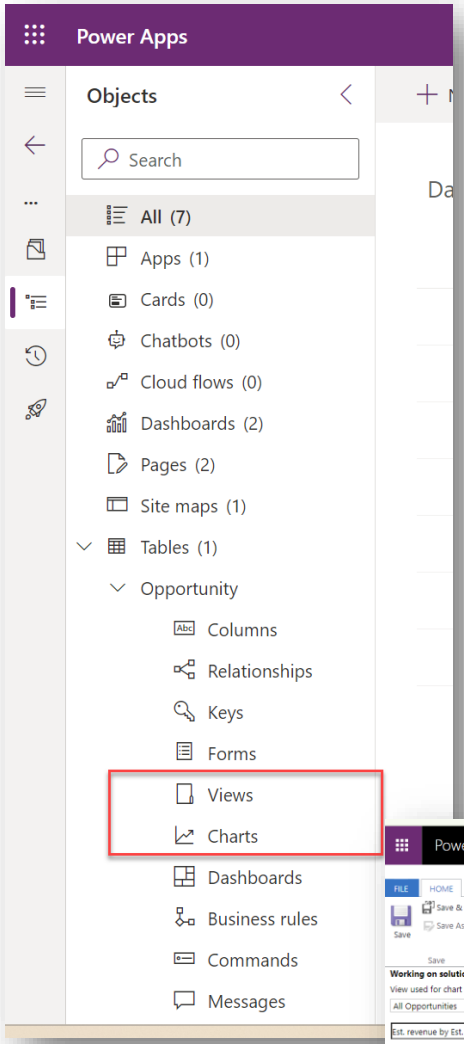
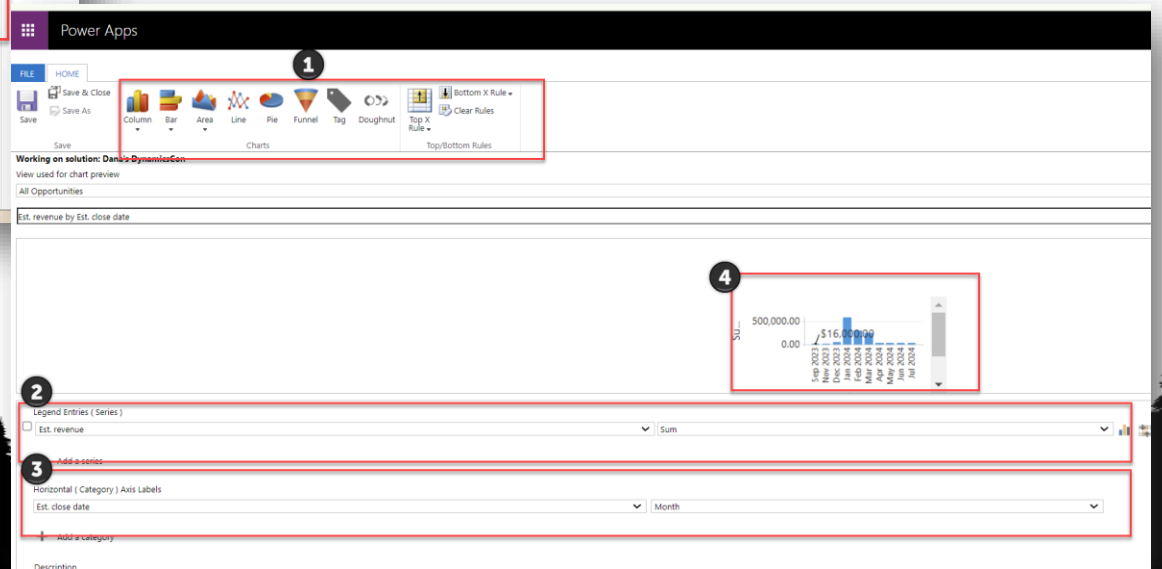
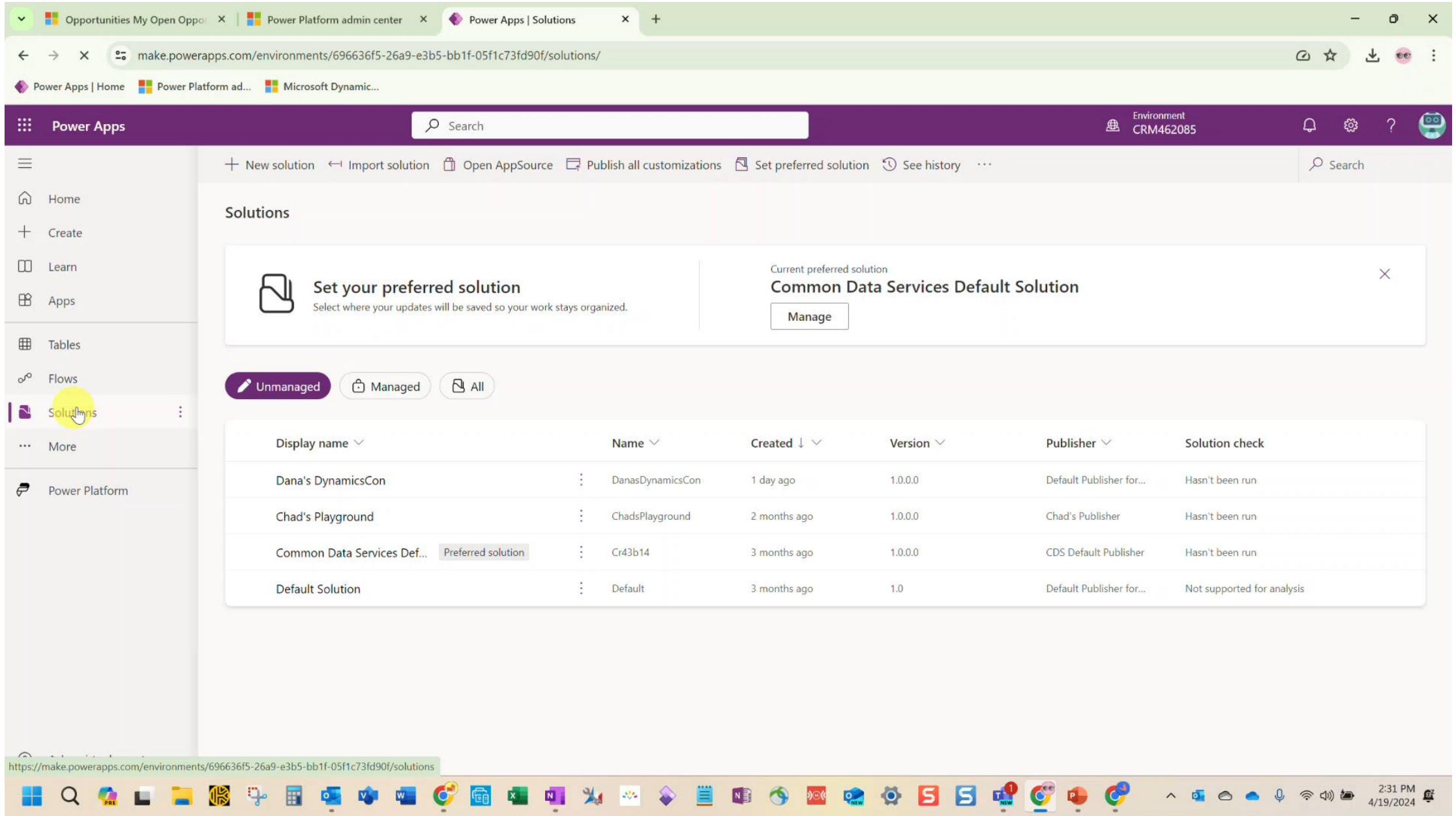
Est. revenue
Contact
Account
Probability
Rating
Email (Potential Custom...
5 Café BG-1 Pro Grinders for Northwind Traders
Northwind Traders
2/12/2024
$24,995.00
Heriberto Nathan
Northwind Traders
93
Cold
5 Café A-100 Automatic
Trey Research
2/18/2024
$77,500.00
Alex Baker
Trey Research
85
Hot
6 orders of Product SKU JJ202 (sample)
Fourth Coffee (sa...
2/18/2024
$10,000.00
Maria Campbell (s...
Fourth Coffee (sa...
90
Hot
3 Café Grande Espresso Machines for A. Datum
A. Datum Corpora...
2/21/2024
$44,700.00
Kevin Martin
A. Datum Corpora...
90
Warm
2 Semiautomatic Espresso Machines for A. Datum
A. Datum Corpora...
2/22/2024
$39,800.00
Kevin Martin
A. Datum Corpora...
78
Warm
1 Café BG-1 Grinder for Alpine Ski House
Alpine Ski House
3/2/2024
$4,999.00
Dwayne Elijah
Alpine Ski House
80
Cold
18 Airpot Coffee Makers for Northwind Traders
Northwind Traders
3/4/2024
$30,582.00
Miguel Garcia
Northwind Traders
93
Cold
2 Café Duo Espresso Machines for Fabrikam
Fabrikam, Inc.
3/5/2024
$25,800.00
Zoltán Szabó
Fabrikam, Inc.
90
Warm
1 Café Grande Espresso Machine for Alpine Ski House
Alpine Ski House
3/6/2024
$14,900.00
Cacilia Viera
Alpine Ski House
70
Cold
50 Café A-100 Automatic
Trey Research
3/7/2024
$95,000.00
Avery Howard
Trey Research
81
Warm
10 Airpot XL Coffee Makers for Alpine Ski House
Alpine Ski House
3/13/2024
$4,990.00
Cacilia Viera
Alpine Ski House
65
Cold
9 Café PG-1 Grinders for A. Datum
A. Datum Corpora...
3/13/2024
$35,991.00
Kevin Martin
A. Datum Corpora...
80
Hot
2 Café Corto for Northwind Traders
Northwind Traders
3/28/2024
$33,800.00
Miguel Garcia
Northwind Traders
80
Cold
Needs to restock their supply of Product SKU AX305; will purchase a...
Blue Yonder Airlin...
4/15/2024
$25,000.00
Sidney Higa (samp...
Blue Yonder Airlin...
Hot
Very likely will order 18 Product SKU JJ202 this year (sample)
Alpine Ski House (...
5/18/2024
$30,000.00
Paul Cannon (sam...
Alpine Ski House (...
Hot
They sell many of the same items that we do - need to follow up (sa...
Contoso Pharmac...
6/21/2024
$26,000.00
Robert Lyon (samp...
Contoso Pharmac...
95
Hot
Will be ordering about 110 items of all types (sample)
Coho Winery (sam...
7/19/2024
$25,000.00
Jim Glynn (sample)
Coho Winery (sam...
80
Hot
1 - 17 of 17
Page 1
2:17 PM
4/19/2024

System Views

- Power Apps
  - Benefit of a solution
  - Can be role-based/app-based to limit view
  - Easier to management and access
  - Make sure to publish to the Model Driven App
- Creating Views



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Power Platform admin center
Power Apps | Solutions
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Power Apps | Home
Power Platform ad...
Microsoft Dynamic...
Power Apps
Search
Environment
CRM462085
New solution
Import solution
Open AppSource
Publish all customizations
Set preferred solution
See history
Search
Home
Create
Learn
Apps
Tables
Flows
Solutions
More
Power Platform
Solutions
Set your preferred solution
Select where your updates will be saved so your work stays organized.
Current preferred solution
Common Data Services Default Solution
Manage
Unmanaged
Managed
All
Display name
Name
Created
Version
Publisher
Solution check
Dana's DynamicsCon
DanasDynamicsCon
1 day ago
1.0.0.0
Default Publisher for...
Hasn't been run
Chad's Playground
ChadsPlayground
2 months ago
1.0.0.0
Chad's Publisher
Hasn't been run
Common Data Services Def...
Preferred solution
Cr43b14
3 months ago
1.0.0.0
CDS Default Publisher
Hasn't been run
Default Solution
Default
3 months ago
1.0
Default Publisher for...
Not supported for analysis
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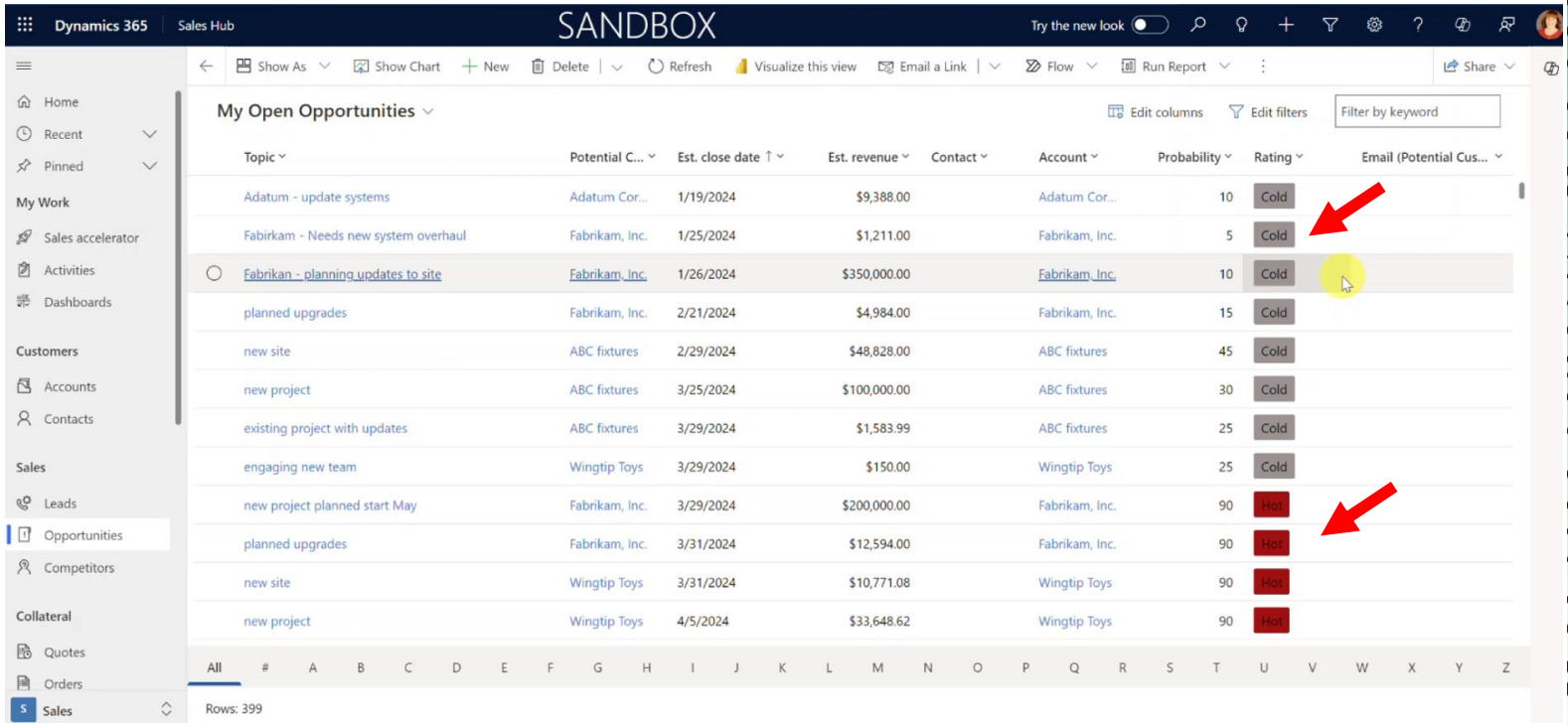
4/19/2024

Spicy View

- Taking your views to another level
  - Provides users with better visibility
  - Ensures important data is not overlooked
  - User Adoption practices



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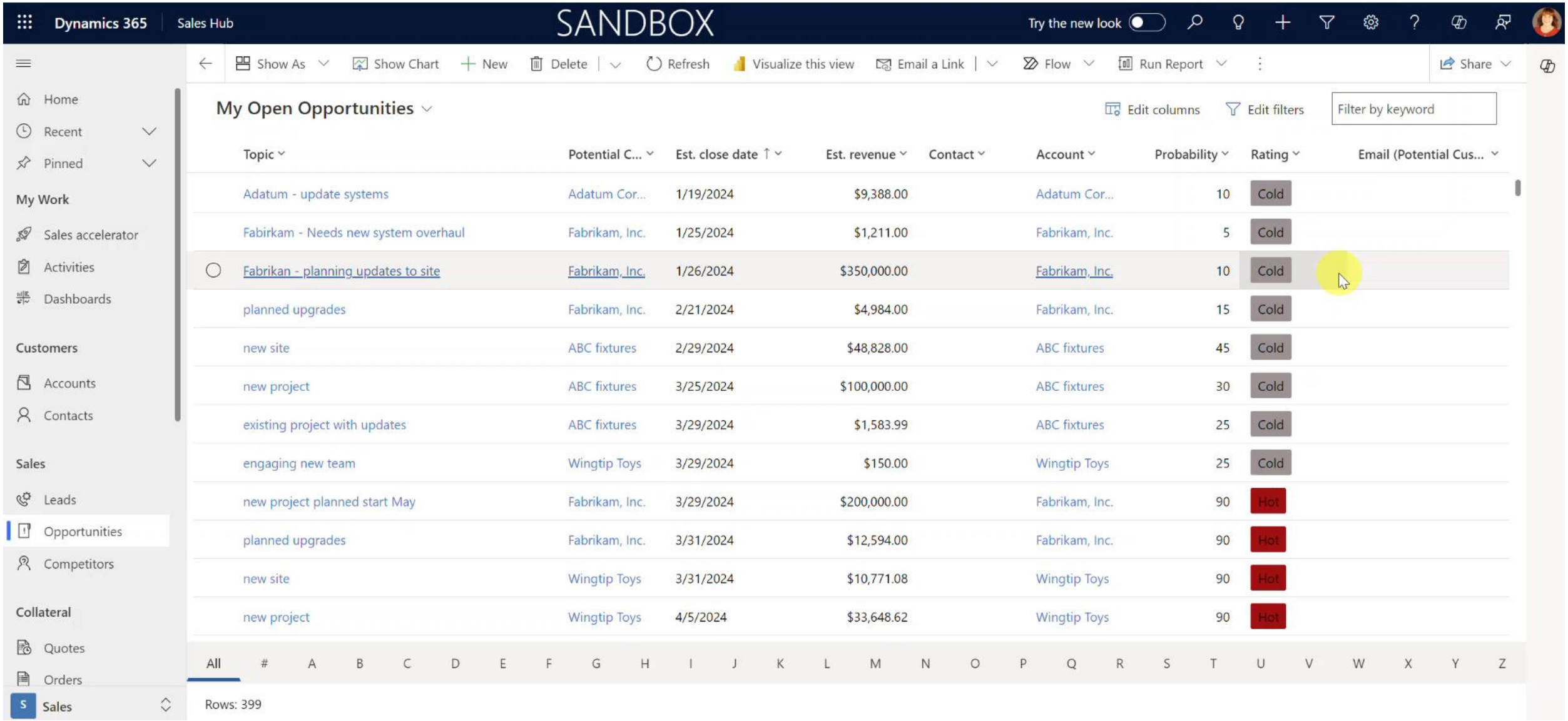
Dynamics 365
Sales Hub
SANDBOX
Try the new look
Show As
Show Chart
New
Delete
Refresh
Visualize this view
Email a Link
Flow
Run Report
Share
Home
Recent
Pinned
My Work
Sales accelerator
Activities
Dashboards
Customers
Accounts
Contacts
Sales
Leads
Opportunities
Competitors
Collateral
Quotes
Orders
Sales
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Edit filters
Filter by keyword
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Adatum - update systems
Adatum Cor...
1/19/2024
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Adatum Cor...
10
Cold
Fabirkam - Needs new system overhaul
Fabrikam, Inc.
1/25/2024
$1,211.00
Fabrikam, Inc.
5
Cold
Fabrikan - planning updates to site
Fabrikam, Inc.
1/26/2024
$350,000.00
Fabrikam, Inc.
10
Cold
planned upgrades
Fabrikam, Inc.
2/21/2024
$4,984.00
Fabrikam, Inc.
15
Cold
new site
ABC fixtures
2/29/2024
$48,828.00
ABC fixtures
45
Cold
new project
ABC fixtures
3/25/2024
$100,000.00
ABC fixtures
30
Cold
existing project with updates
ABC fixtures
3/29/2024
$1,583.99
ABC fixtures
25
Cold
engaging new team
Wingtip Toys
3/29/2024
$150.00
Wingtip Toys
25
Cold
new project planned start May
Fabrikam, Inc.
3/29/2024
$200,000.00
Fabrikam, Inc.
90
Hot
planned upgrades
Fabrikam, Inc.
3/31/2024
$12,594.00
Fabrikam, Inc.
90
Hot
new site
Wingtip Toys
3/31/2024
$10,771.08
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90
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new project
Wingtip Toys
4/5/2024
$33,648.62
Wingtip Toys
90
Hot
All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
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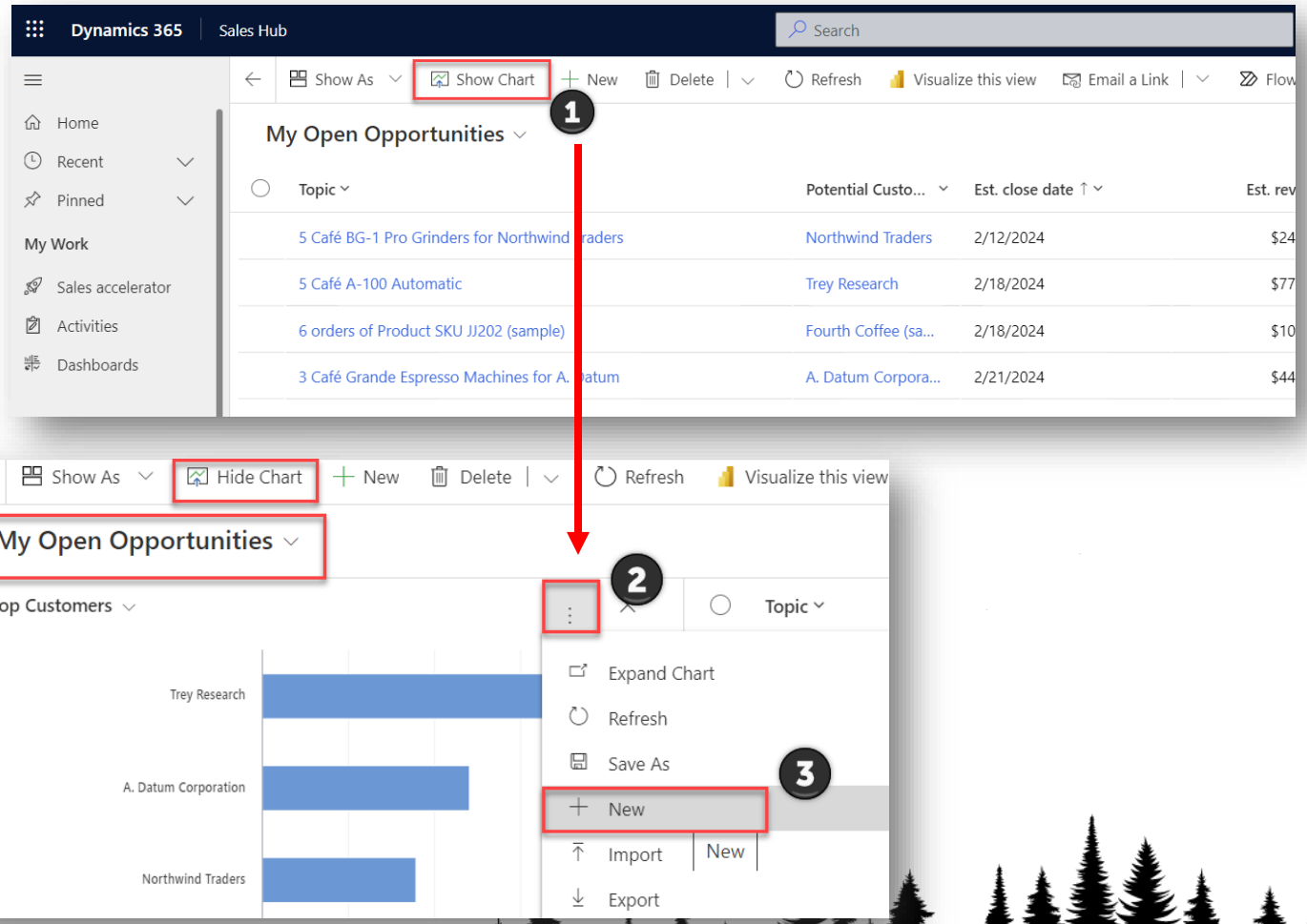
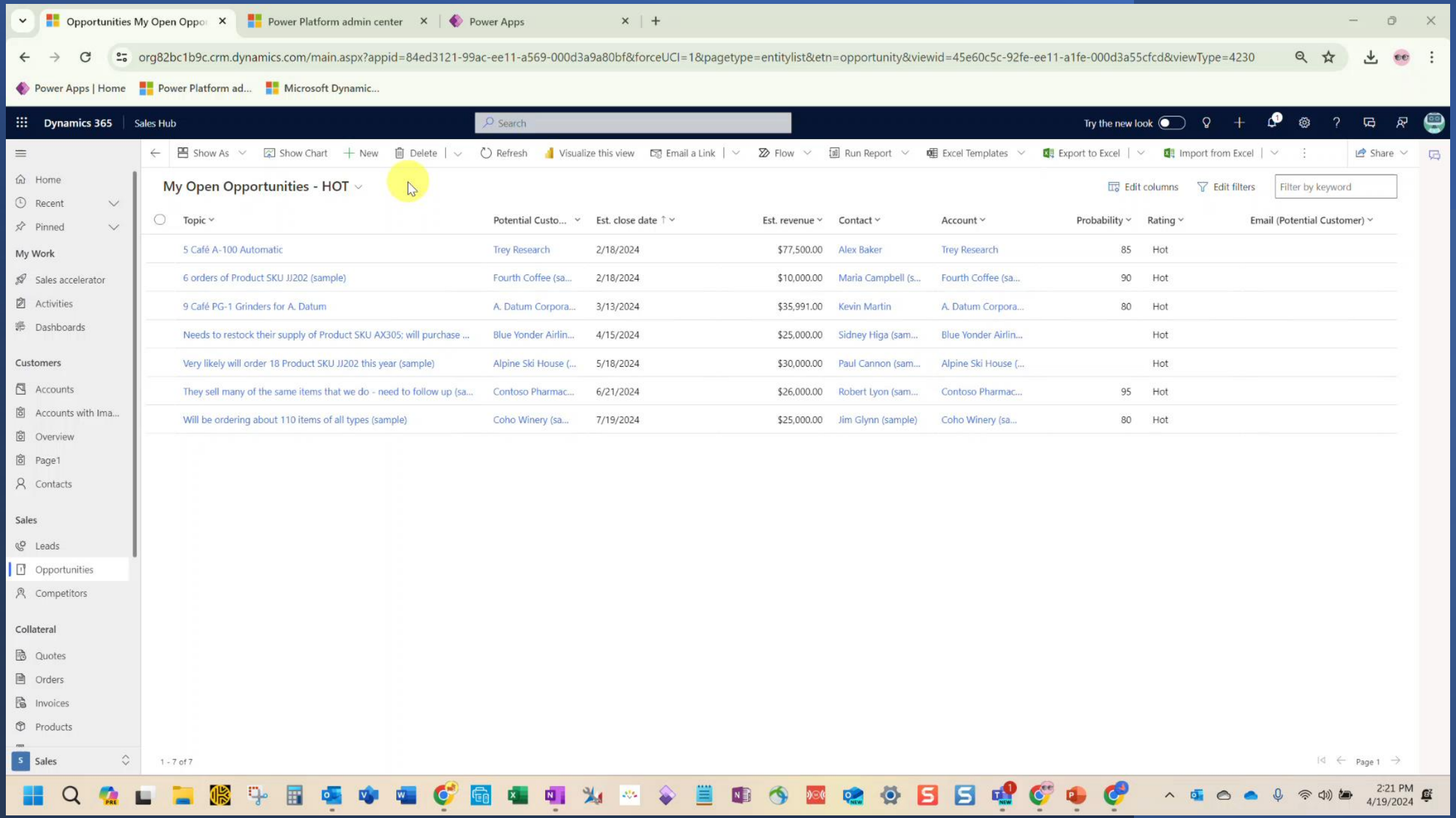
Personal Charts

- Creating Personal Charts
  - Role Based Access
  - Freedom
  - Creativity & Sharing
  - Process time and ROI




Opportunities My Open Oppo
Power Platform admin center
Power Apps
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Power Apps | Home
Power Platform ad...
Microsoft Dynamic...
Dynamics 365
Sales Hub
Search
Try the new look
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Run Report
Excel Templates
Export to Excel
Import from Excel
Share
Home
Recent
Pinned
My Work
Sales accelerator
Activities
Dashboards
Customers
Accounts
Accounts with Ima...
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Competitors
Collateral
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Est. revenue
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Account
Probability
Rating
Email (Potential Customer)
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Trey Research
2/18/2024
$77,500.00
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A. Datum Corpora...
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A. Datum Corpora...
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$25,000.00
Sidney Higa (sam...
Blue Yonder Airlin...
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5/18/2024
$30,000.00
Paul Cannon (sam...
Alpine Ski House (...
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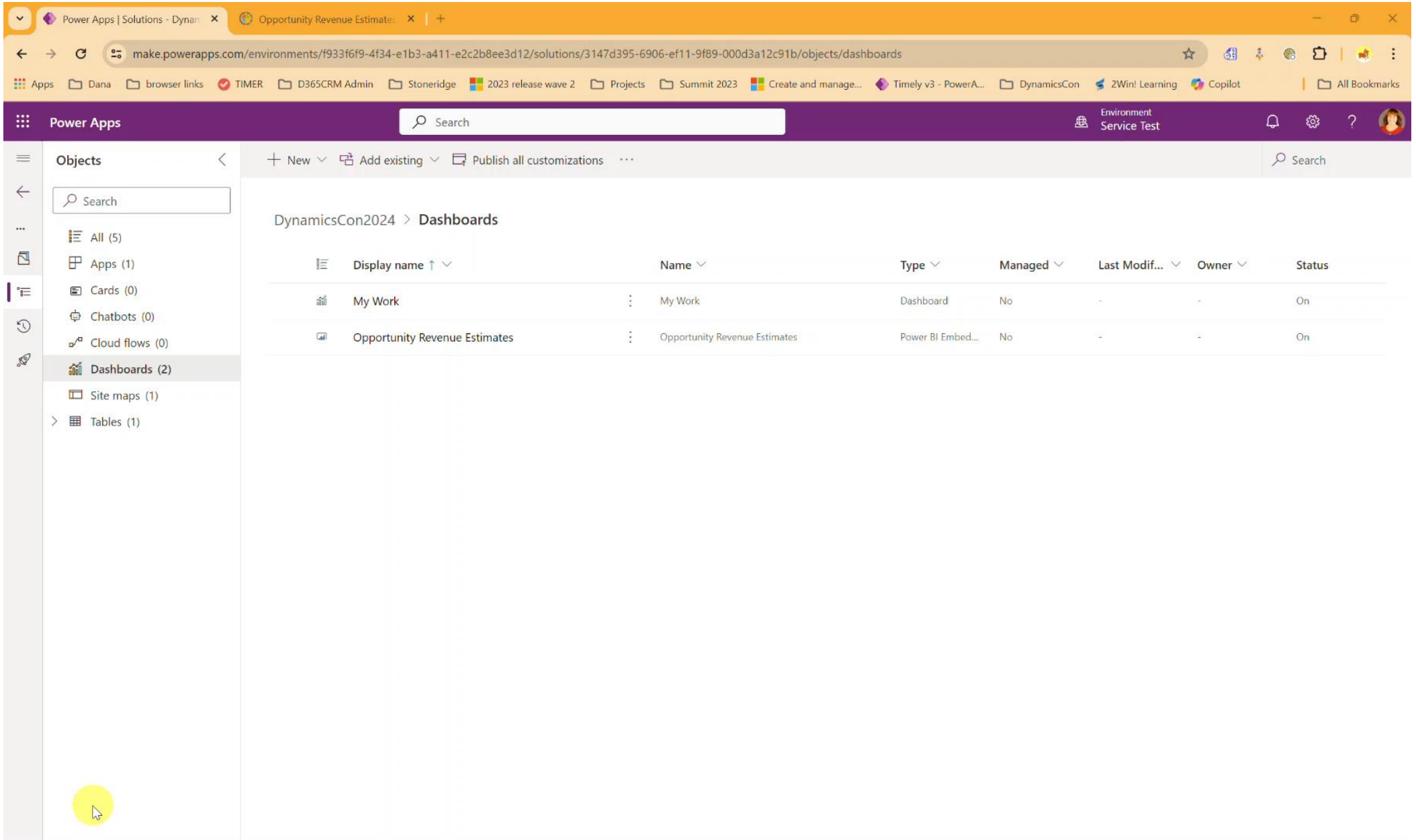
6/21/2024
$26,000.00
Robert Lyon (sam...
Contoso Pharmac...
95
Hot
Will be ordering about 110 items of all types (sample)
Coho Winery (sa...
7/19/2024
$25,000.00
Jim Glynn (sample)
Coho Winery (sa...
80
Hot
1 - 7 of 7
Page 1
2:21 PM
4/19/2024

System Charts

- Can be based on personal views or system views
- Defined for users that don’t want to customize
- Focused data
- Admin needed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TIMER
D365CRM Admin
Stoneridge
2023 release wave 2
Projects
Summit 2023
Create and manage...
Timely v3 - PowerA...
DynamicsCon
2Win! Learning
Copilot
All Bookmarks
Power Apps
Search
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Service Test
Objects
Search
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Apps (1)
Cards (0)
Chatbots (0)
Cloud flows (0)
Dashboards (2)
Site maps (1)
Tables (1)
New
Add existing
Publish all customizations
Search
DynamicsCon2024
Dashboards
Display name
Name
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Last Modif...
Owner
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My Work
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Dashboard
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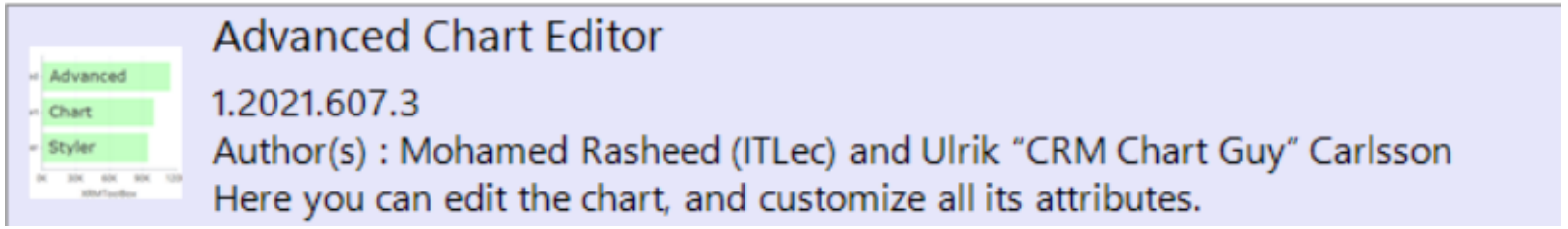
On
Opportunity Revenue Estimates
Opportunity Revenue Estimates
Power BI Embed...
No
On

Spicy Charts

- XRMToolBox Chart Editor
  - Limitations of the OOB Chart Editor in Power Platform/Dynamics CE
  - Advanced Chart Editor - Ability to modify color, font, and other key features of charts



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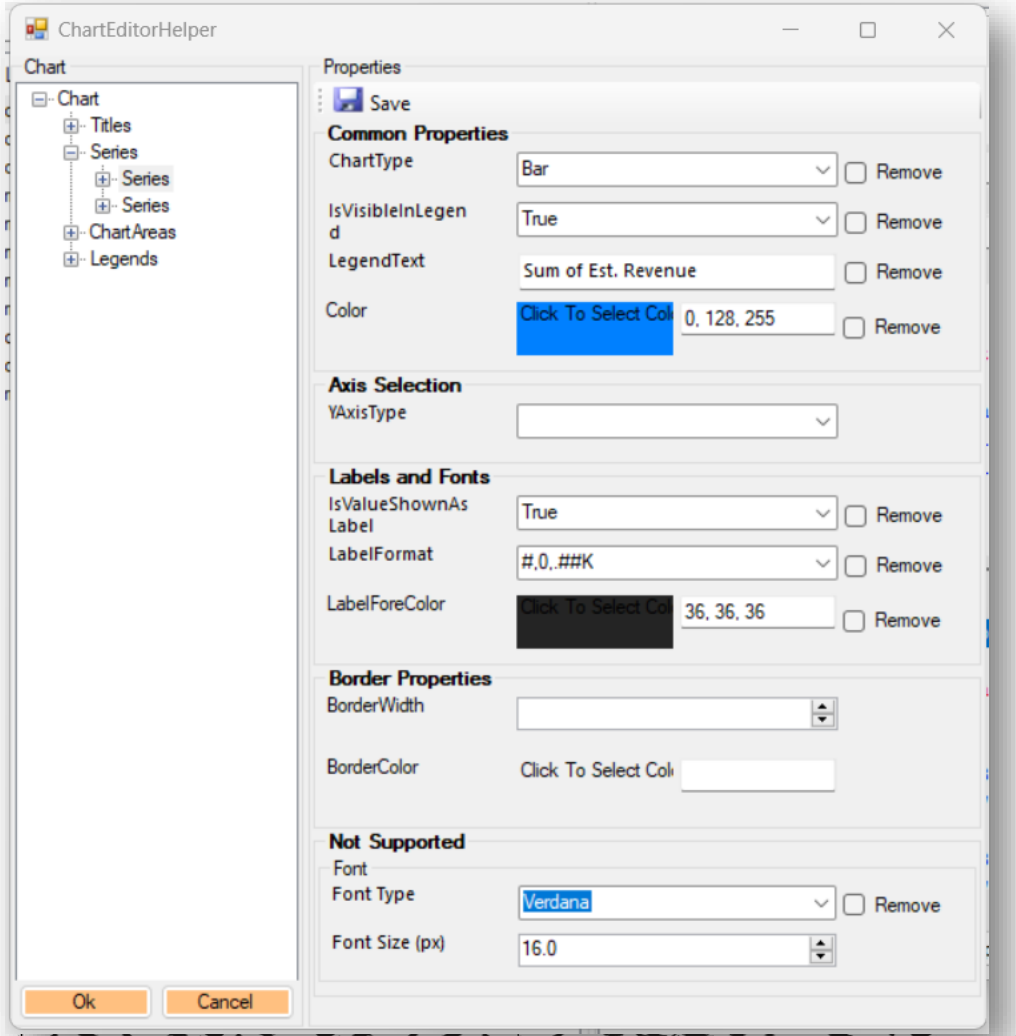
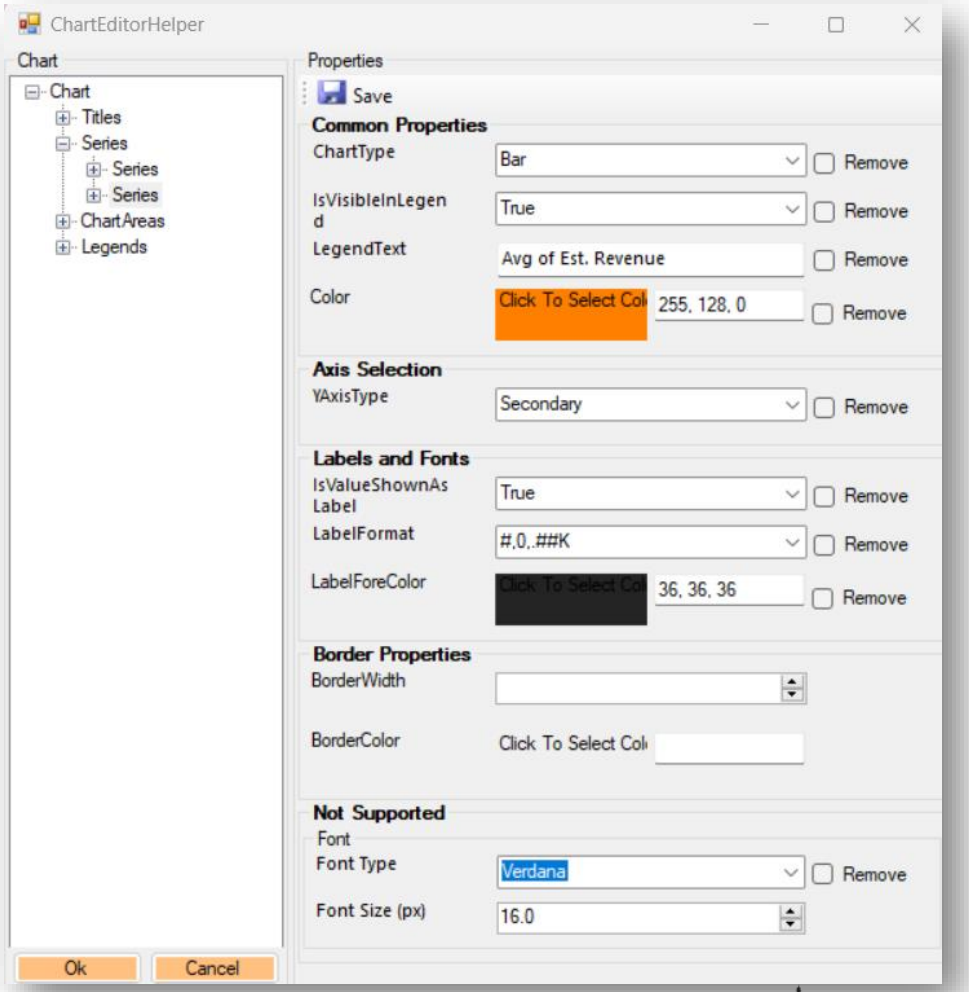
- Before

Open Opportunities
Est. revenue, Est. revenue by Account (DCON)
Sum (Est. revenue) ($)
Avg (Est. revenue) ($)
Avg (Est. revenue) ($)
0.00
5,000.00
10,000.00
15,000.00
20,000.00
25,000.00
40,000.00
45,000.00
50,000.00
55,000.00
60,000.00
65,000.00
70,000.00
75,000.00
80,000.00
Account
Fabrikam, Inc.
$25,800.00
$25,800.00
Alpine Ski House
$24,889.00
$8,296.33
A. Datum Corporation
$120,491.00
$40,163.67
Fourth Coffee (sample)
$10,000.00
$10,000.00
Blue Yonder Airlines (sample)
$25,000.00
$25,000.00
Contoso Pharmaceuticals (sample)
$26,000.00
$26,000.00
Alpine Ski House (sample)
$30,000.00
$30,000.00

Series Settings





POWERED BY DUG
DYNAMICSCON LIVE
MAY 2024

- After

Open Opportunities
Est. revenue, Est. revenue by Account (DCON)
Sum of Est. Revenue
Avg of Est. Revenue
Avg of Est. Revenue
0.00
5,000.00
10,000.00
15,000.00
20,000.00
25,000.00
30,000.00
35,000.00
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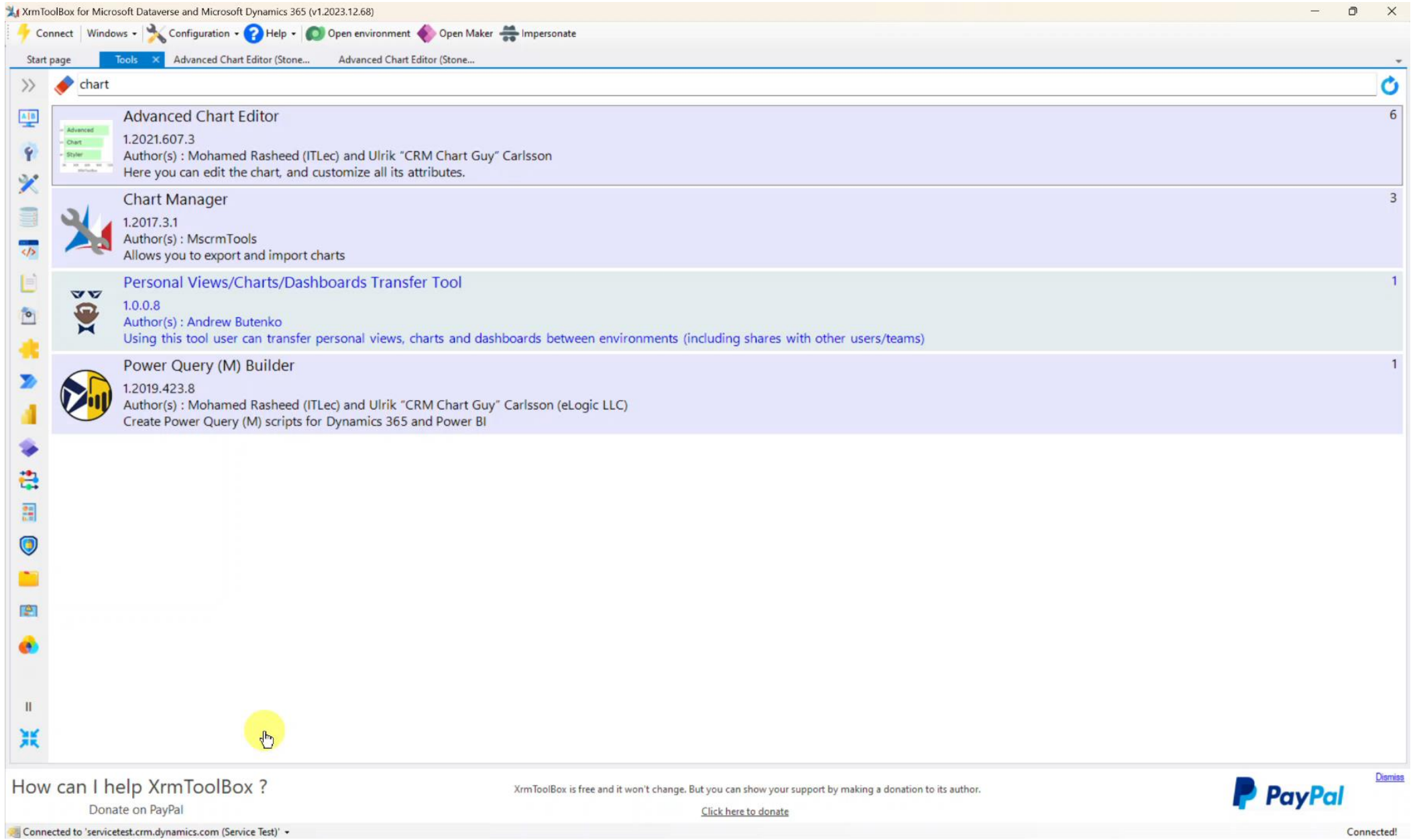
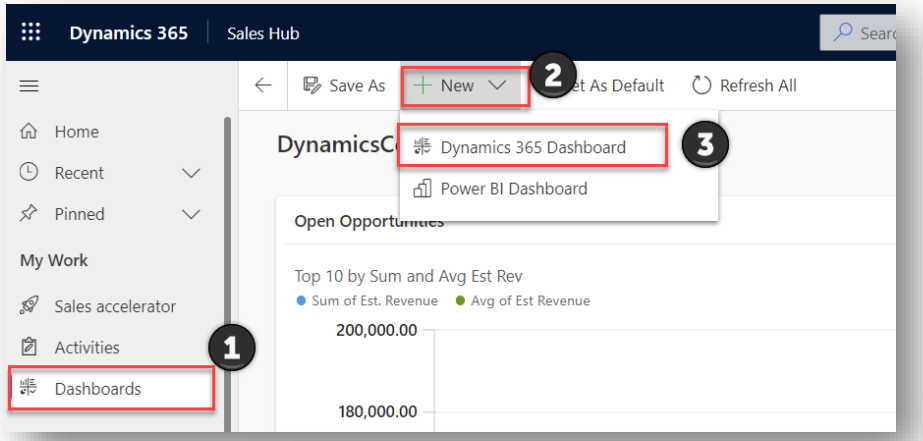
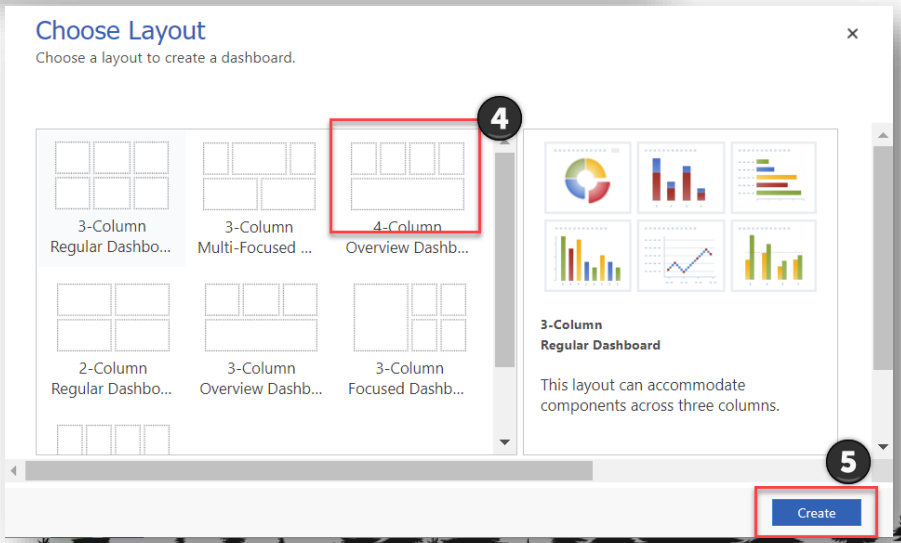
60,000.00
65,000.00
70,000.00
Fabrikam, Inc.
25.8K
25.8K
Alpine Ski House
24.89K
8.3K
A. Datum Corporation
120.49K
40.16K
Fourth Coffee (sample)
10K
10K
Blue Yonder Airlines (sample)
25K
25K
Contoso Pharmaceuticals (sample)
26K
26K
Account

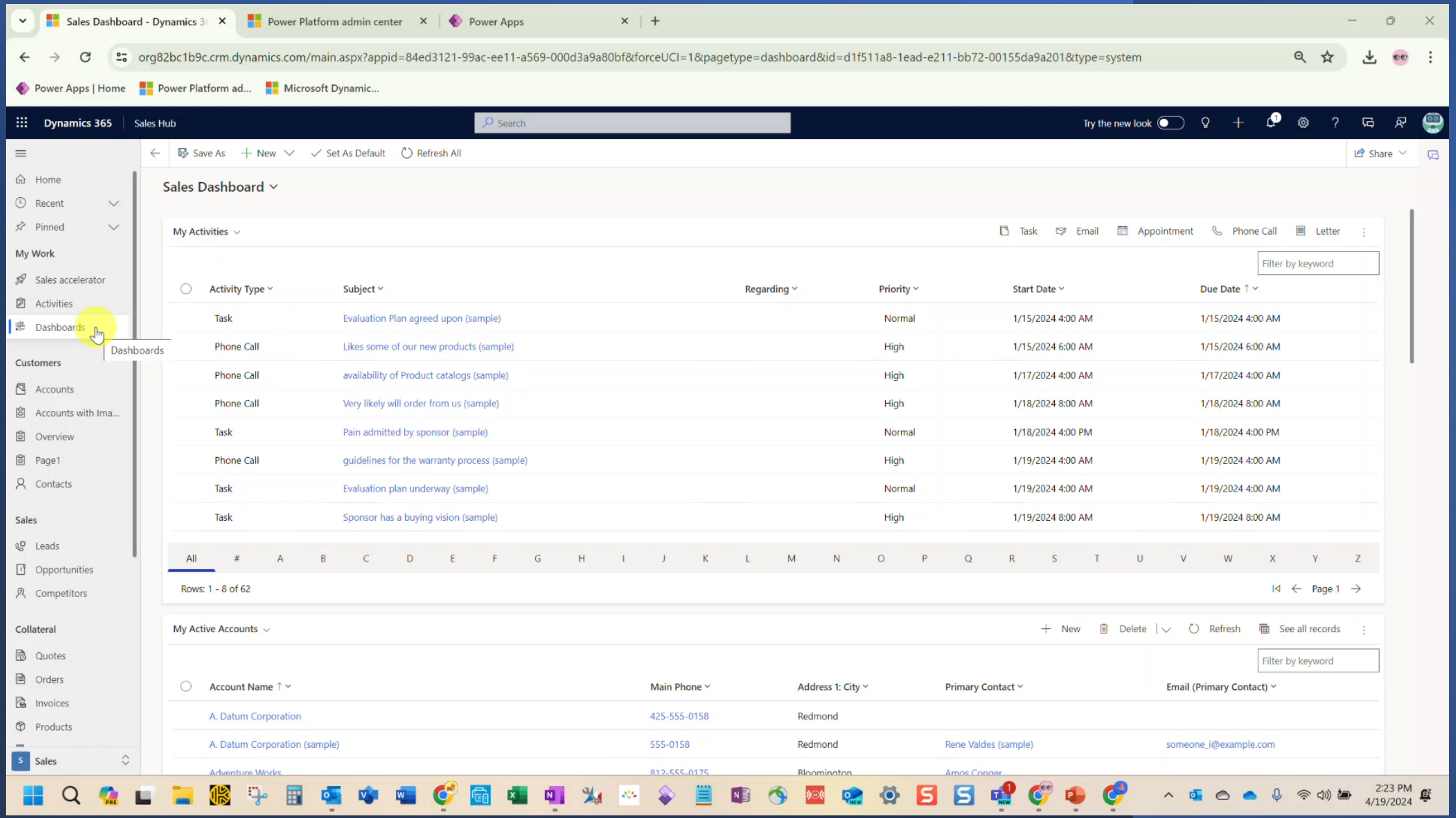

XrmToolBox for Microsoft Dataverse and Microsoft Dynamics 365 (v1.2023.12.68)
Connect
Windows
Configuration
Help
Open environment
Open Maker
Impersonate
Start page
Tools
Advanced Chart Editor (Stone...
Advanced Chart Editor (Stone...
chart
Advanced Chart Editor
6
1.2021.607.3
Author(s) : Mohamed Rasheed (ITLec) and Ulrik "CRM Chart Guy" Carlsson
Here you can edit the chart, and customize all its attributes.
Chart Manager
3
1.2017.3.1
Author(s) : MscrmTools
Allows you to export and import charts
Personal Views/Charts/Dashboards Transfer Tool
1
1.0.0.8
Author(s) : Andrew Butenko
Using this tool user can transfer personal views, charts and dashboards between environments (including shares with other users/teams)
Power Query (M) Builder
1
1.2019.423.8
Author(s) : Mohamed Rasheed (ITLec) and Ulrik "CRM Chart Guy" Carlsson (eLogic LLC)
Create Power Query (M) scripts for Dynamics 365 and Power BI
How can I help XrmToolBox ?
Donate on PayPal
XrmToolBox is free and it won't change. But you can show your support by making a donation to its author.
Click here to donate
PayPal
Dismiss
Connected to 'servicetest.crm.dynamics.com (Service Test)'
Connected!

Personal Dashboards

- Creating Personal Dashboards
  - Sharable *can be a detractor
  - Can Embed existing PBI Dashboards (pre-existing and accessible)
  - Can be moved with XRMToolBox to other environments – but if widespread sharing best to be a system dashboard
    - Heavy maintenance: share the view, then the chart, then the dashboard

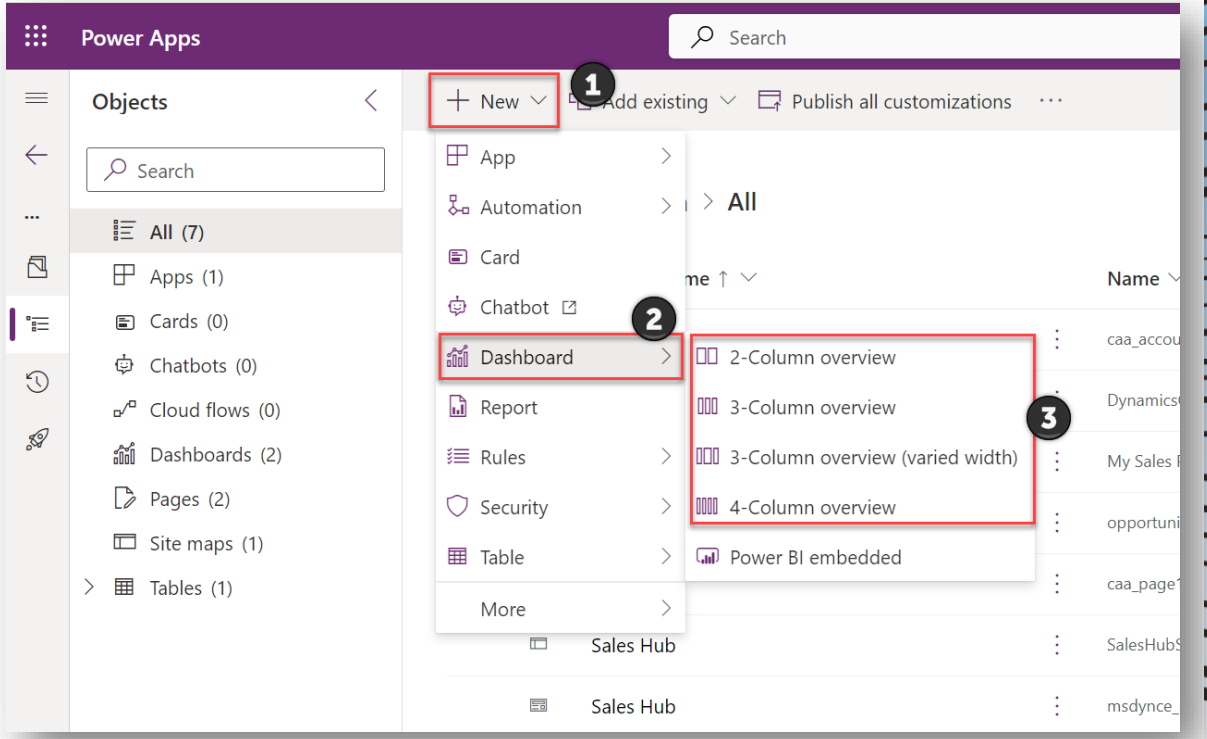





Sales Dashboard - Dynamics 3
Power Platform admin center
Power Apps
org82bc1b9c.crm.dynamics.com/main.aspx?appid=84ed3121-99ac-ee11-a569-000d3a9a80bf&forceUCI=1&pagetype=dashboard&id=d1f511a8-1ead-e211-bb72-00155da9a201&type=system
Power Apps | Home
Power Platform ad...
Microsoft Dynamic...
Dynamics 365
Sales Hub
Search
Try the new look
Save As
New
Set As Default
Refresh All
Share
Home
Recent
Pinned
My Work
Sales accelerator
Activities
Dashboards
Customers
Accounts
Accounts with Ima...
Overview
Page1
Contacts
Sales
Leads
Opportunities
Competitors
Collateral
Quotes
Orders
Invoices
Products
Sales
Sales Dashboard
My Activities
Task
Email
Appointment
Phone Call
Letter
Filter by keyword
Activity Type
Subject
Regarding
Priority
Start Date
Due Date
Task
Evaluation Plan agreed upon (sample)
Normal
1/15/2024 4:00 AM
1/15/2024 4:00 AM
Phone Call
Likes some of our new products (sample)
High
1/15/2024 6:00 AM
1/15/2024 6:00 AM
Phone Call
availability of Product catalogs (sample)
High
1/17/2024 4:00 AM
1/17/2024 4:00 AM
Phone Call
Very likely will order from us (sample)
High
1/18/2024 8:00 AM
1/18/2024 8:00 AM
Task
Pain admitted by sponsor (sample)
Normal
1/18/2024 4:00 PM
1/18/2024 4:00 PM
Phone Call
guidelines for the warranty process (sample)
High
1/19/2024 4:00 AM
1/19/2024 4:00 AM
Task
Evaluation plan underway (sample)
Normal
1/19/2024 4:00 AM
1/19/2024 4:00 AM
Task
Sponsor has a buying vision (sample)
High
1/19/2024 8:00 AM
1/19/2024 8:00 AM
All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Rows: 1 - 8 of 62
Page 1
My Active Accounts
New
Delete
Refresh
See all records
Filter by keyword
Account Name
Main Phone
Address 1: City
Primary Contact
Email (Primary Contact)
A. Datum Corporation
425-555-0158
Redmond
A. Datum Corporation (sample)
555-0158
Redmond
Rene Valdes (sample)
someone_i@example.com
2:23 PM
4/19/2024

System Dashboards

- Create Views and Charts First
- Standard OOB versus PowerBI Enbedded
- Optional Site Map additions



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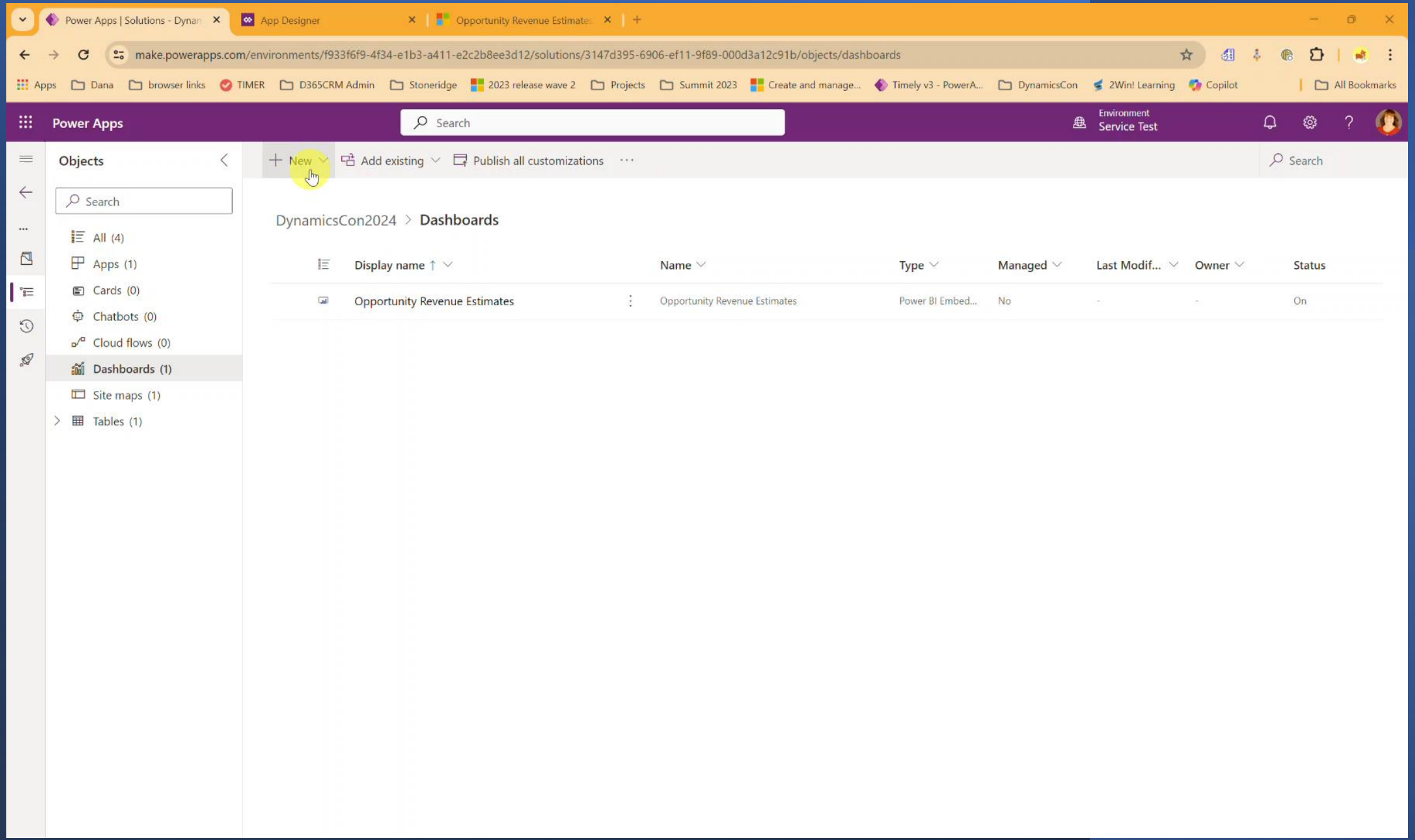
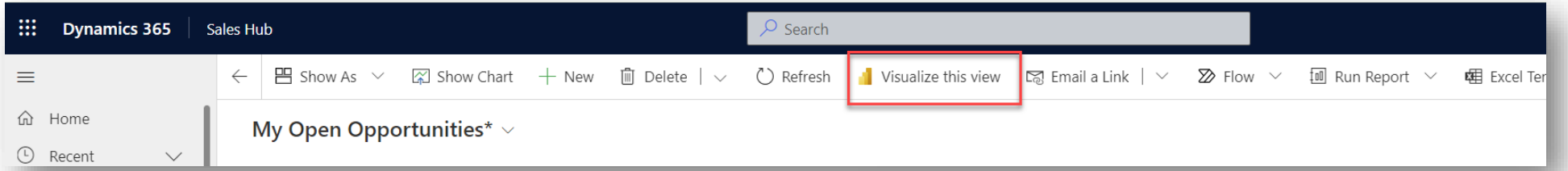
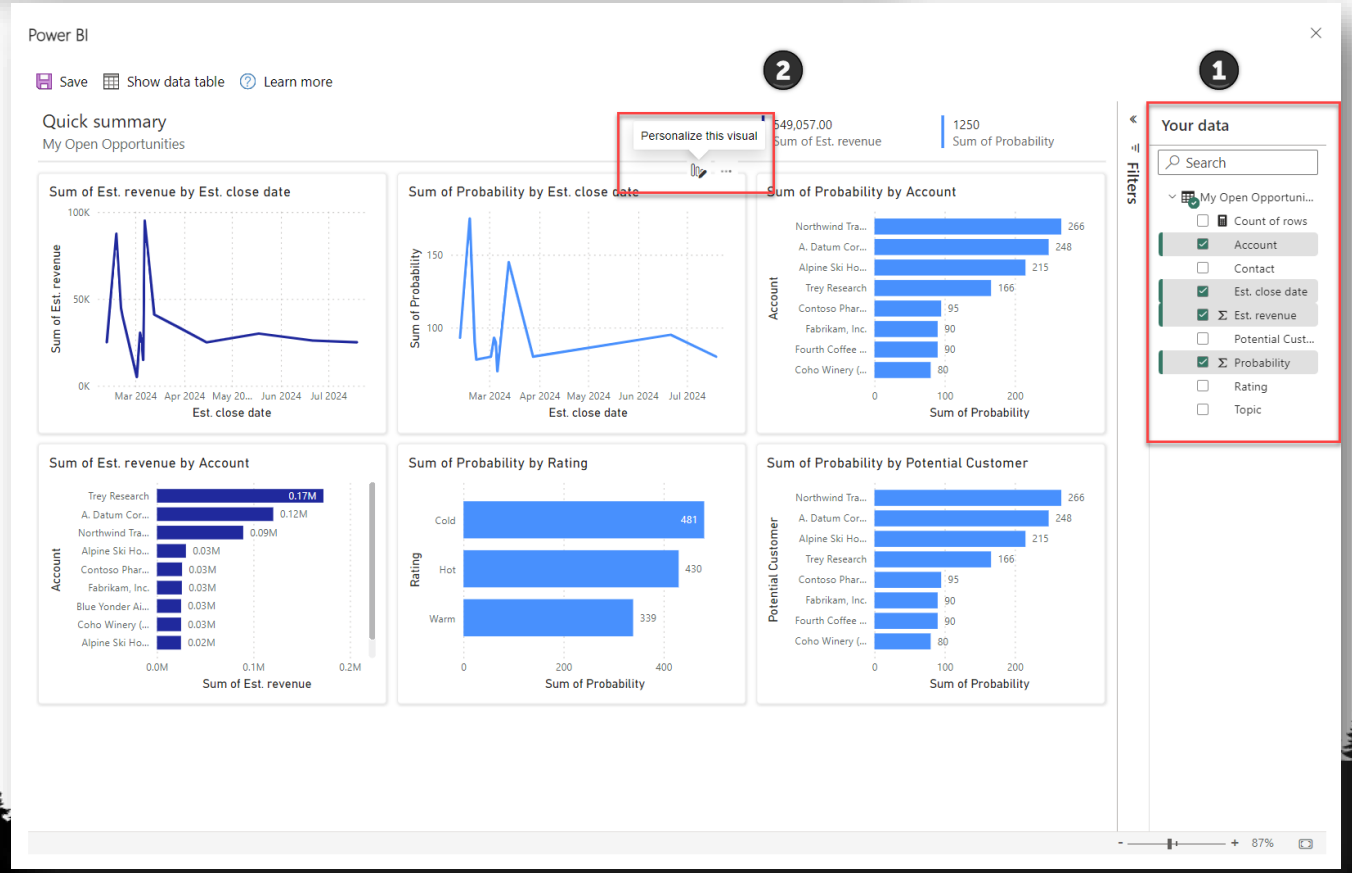
DYNAMICSCON LIVE
MAY 2024


Power Apps | Solutions - Dynan
App Designer
Opportunity Revenue Estimates
make.powerapps.com/environments/f933f6f9-4f34-e1b3-a411-e2c2b8ee3d12/solutions/3147d395-6906-ef11-9f89-000d3a12c91b/objects/dashboards
Apps
Dana
browser links
TIMER
D365CRM Admin
Stoneridge
2023 release wave 2
Projects
Summit 2023
Create and manage...
Timely v3 - PowerA...
DynamicsCon
2Win! Learning
Copilot
All Bookmarks
Power Apps
Search
Environment
Service Test
Objects
Search
All (4)
Apps (1)
Cards (0)
Chatbots (0)
Cloud flows (0)
Dashboards (1)
Site maps (1)
Tables (1)
New
Add existing
Publish all customizations
Search
DynamicsCon2024
Dashboards
Display name
Name
Type
Managed
Last Modif...
Owner
Status
Opportunity Revenue Estimates
Opportunity Revenue Estimates
Power BI Embed...
No
On

Spicy Dashboards



- PowerBI Reports for Everyone
  - Can be a personal Workspace or Shared
  - Can be embedded in a dashboard
  - Access to a free version of PBI



Dynamics 365 | Sales Hub

SANDBOX

Try the new look

Show As | Hide Chart | New | Delete | Refresh | Visualize this view | Email a Link | Flow | Run Report | Share

- Home
- Recent
- Pinned

My Work
- Sales accelerator
- Activities
- Dashboards

Customers
- Accounts
- Contacts

Sales
- Leads
- Opportunities
- Competitors

Collateral
- Quotes
- Orders

Sales

My Open Opportunities with Rating

Edit columns | Edit filters | Filter by keyword

Opportunities by Est Close and Est Rev.

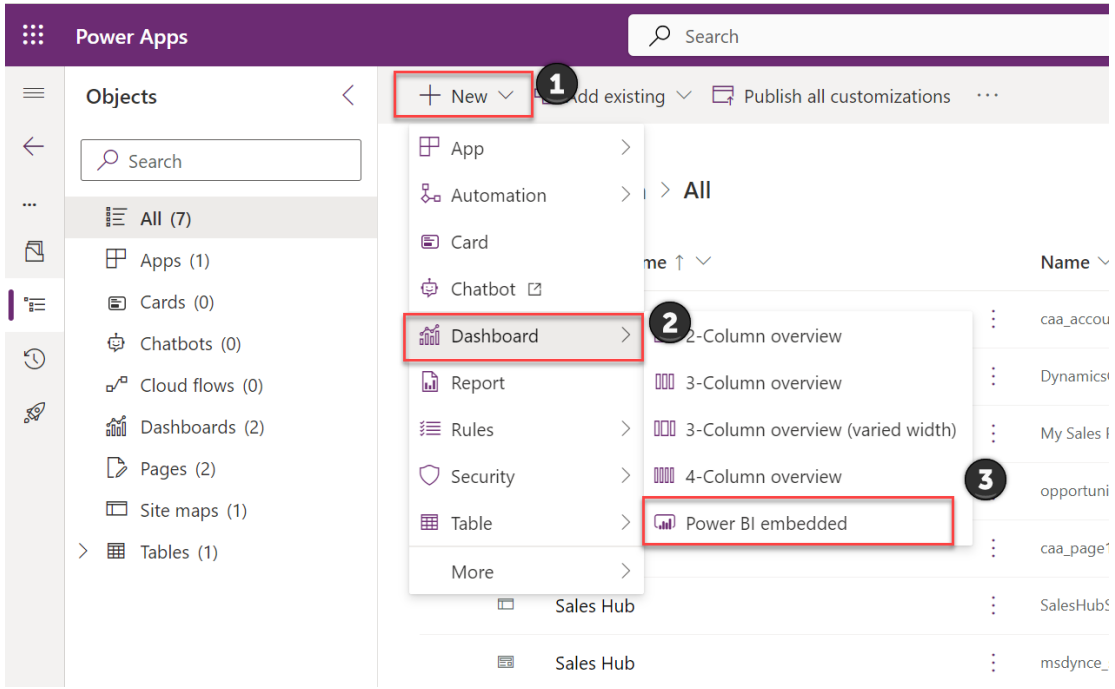
Topic	Potenti...	Est. close ...	Est. reven...	Contact	Account	Probabi...
Adatum - update systems	Adatum ...	1/19/2024	$9,388.00		Adatum ...	10
Fabirkam - Needs new system overhaul	Fabrikam,...	1/25/2024	$1,211.00		Fabrikam,...	5
Fabrikan - planning updates to site	Fabrikam,...	1/26/2024	$350,000.00		Fabrikam,...	10
planned upgrades	Fabrikam,...	2/21/2024	$4,984.00		Fabrikam,...	15
new site	ABC fixtur...	2/29/2024	$48,828.00		ABC fixtur...	45
new project	ABC fixtur...	3/25/2024	$100,000.00		ABC fixtur...	30
existing project with updates	ABC fixtur...	3/29/2024	$1,583.99		ABC fixtur...	25
engaging new team	Wingtip T...	3/29/2024	$150.00		Wingtip T...	25
new project planned start May	Fabrikam,...	3/29/2024	$200,000.00		Fabrikam,...	90
planned upgrades	Fabrikam,...	3/31/2024	$12,594.00		Fabrikam,...	90
new site	Wingtip T...	3/31/2024	$10,771.08		Wingtip T...	90
new project	Wingtip T...	4/5/2024	$33,648.62		Wingtip T...	90
existing project with updates	Wingtip T...	4/5/2024	$1,490.00		Wingtip T...	80

1 - 250 of 399

Page 1

Spicier Dashboards

- Embedded PowerBI Reports
  - Can be created from personal dashboards with setup
  - Create a One Stop Shop
  - Allows access to data without needing a license to the system where that data resides
  - Reports can be added to the Site Map for quick access



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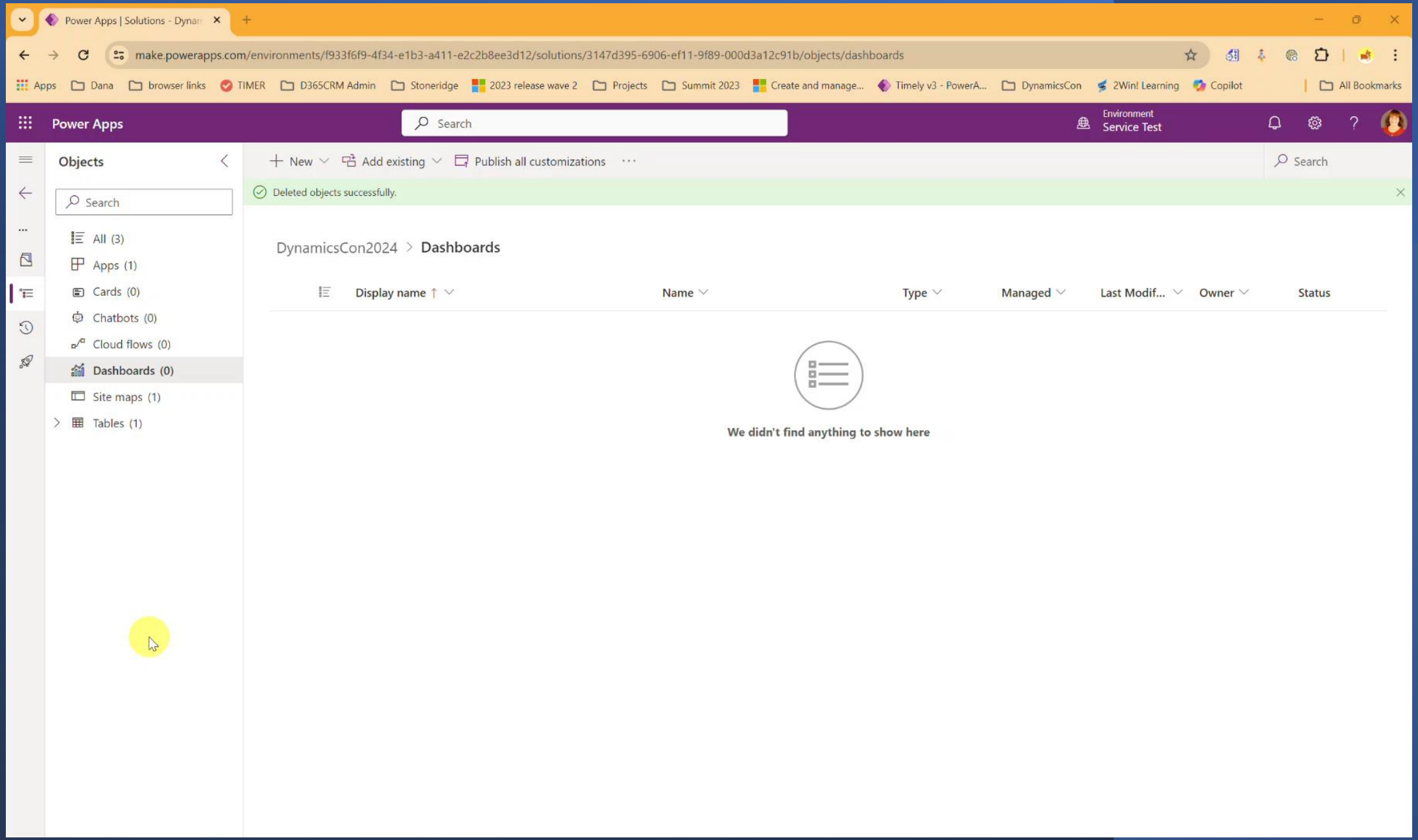
DYNAMICSCON LIVE
MAY 2024


Power Apps | Solutions - Dynan
make.powerapps.com/environments/f933f6f9-4f34-e1b3-a411-e2c2b8ee3d12/solutions/3147d395-6906-ef11-9f89-000d3a12c91b/objects/dashboards
Apps
Dana
browser links
TIMER
D365CRM Admin
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2023 release wave 2
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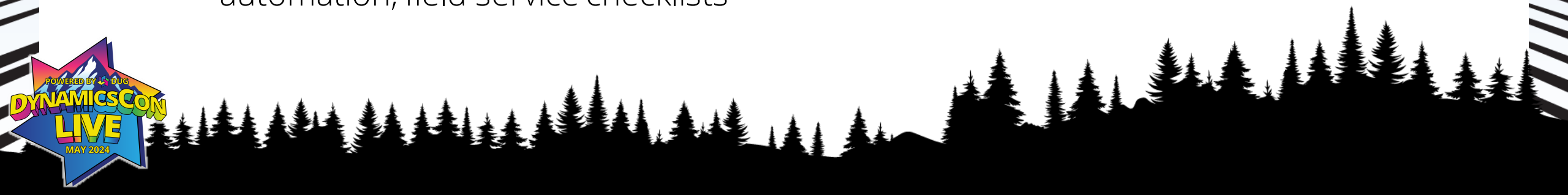
Create and manage...
Timely v3 - PowerA...
DynamicsCon
2Win! Learning
Copilot
All Bookmarks
Power Apps
Search
Environment
Service Test
Objects
Search
All (3)
Apps (1)
Cards (0)
Chatbots (0)
Cloud flows (0)
Dashboards (0)
Site maps (1)
Tables (1)
New
Add existing
Publish all customizations
Search
Deleted objects successfully.
DynamicsCon2024
Dashboards
Display name
Name
Type
Managed
Last Modif...
Owner
Status
We didn't find anything to show here

The Case for SQL Server Reporting Services (SSRS) Reports

- Value Add
  - Emailable – can be sent to customers
  - Embedded images, logos, colors
  - – for a personal or company specific look
  - Uses:
    - Invoices, Sales Order forms, Acknowledgements, report automation, field service checklists
- Detractor
  - Not OOB - Requires code
  - Not able to embed in D365 dashboards
  - Accessible in D365 only with custom code and buttons (can add links in reports table)



Finding Value in Reporting Methods

- **D365 Dashboards**
  - Personal/Org use
  - Quick visual of basic data
  - Focused daily use
  - Some customization with XRMToolBox goes a long way
- **PBI Embedded Dashboards**
  - Combined data sources
  - Access to data without a license
  - Incredible visualizations
- **SSRS**
  - Customized branding
  - Emailing
  - Custom images

Summary

- Personal Views, Charts and Dashboards
- System Views, Charts and Dashboards
- Spicy options for enhancing Views, charts and Dashboards using Tools and a little elbow grease

Questions & Comments

Dana Service

Microsoft Certified Professional

Solution Architect

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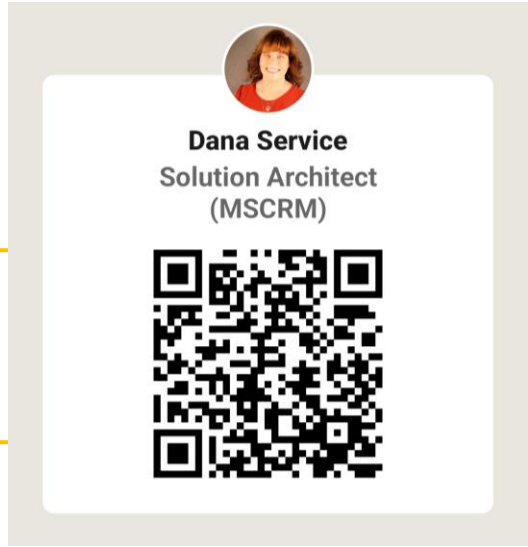
dana.service@stoneridgesoftware.com
linkedin.com/in/dana-service

Microsoft® Certified: Dynamics CRM
User Group Leader – Arizona

16 years in Dynamics CRM:
D365 Power Platform
2011, 2016 CRM On Prem
D365 Online CRM for Sales, Customer Service, Marketing, and Field Service