Microsoft Dynamics 365 for Sales

Workshop Hands-on Lab Book

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Lab Overview

Abstract

Contoso Power is a Smart Energy solutions provider that helps their customers (B2C) better manager their consumption of energy and other natural resources. As such, they have three key offerings:

1. SmartHome Solar Grid
2. SmartHome Water Conservation
3. SmartHome Energy Monitor System

Molly Clark is a Sales Representative for Contoso Power, and recently returned from a regional home and garden tradeshow. Molly is working to follow-up with those individuals that stopped by the booth and filled out an interest's form.

As part of this lab, you will be playing the role of both Molly and the Consumer (you). In doing so, you will better understand how Dynamics 365 for Sales can better enable Sales professionals to stay in touch with their customers and close more business in doing so.

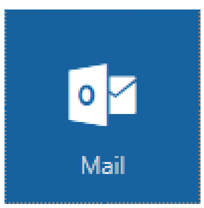
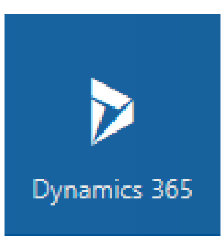
Key Learning Objectives

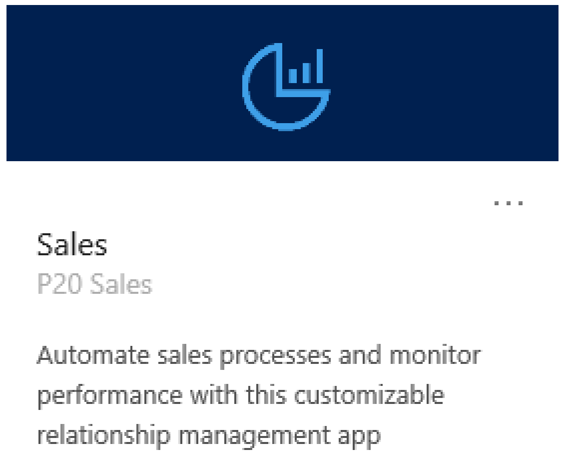
- How Dynamics 365 integrates with Office 365 to enable user productivity
- How Dynamics 365 can utilize Azure Data & AI to enable additional intelligence around your data
- How Dynamics 365 works with Power BI to help users better understand their data
- How Dynamics 365 enables businesses to implement consistent business processes

Exercise 1: Login to Dynamics 365 Environment

Scenario

In this exercise, you will login to the Demo Office 365 and Dynamics 365 Environments. This exercise will provide the foundation for all future exercises.

Task	Detailed Steps
Login to Office 365	1. Open a new "In Private" Microsoft Edge session **(Note: If you already have an In Private session started, first close all In Private windows and open a fresh session)** 2. In the browser addres bar, enter https://portal.office.com 3. When prompted for login credentials use the following identity: Username: mollyc@jasofodemo01.onmicrosoft.com Password: Summ3rP20 4. Go to the tab with the Office 365 app launcher, and click the Dynamics 365 tile. This will lauch your instance of Dynamics 365 for Sales in a new browser tab.
Access Outlook	1. From the Office 365 app launcher, click the Mail tile  2. This will launch a new browser tab with Alicia's Outlook mailbox loaded. 3. Keep this tab open as we will use it in later exercises.
Access Dynamics 365 for Sales	1. Select the browser tab that has the main Office 365 portal loaded 2. From the Office 365 app launcher, click the Dynamics 365 tile  3. This will launch a new browser tab with Dynamics 365 App Launcher

	4. From the Dynamics 365 App Launcher select the Sales – P20 Sales app 
Login to LinkedIn	1. Within your existing “In Private” browsing session, create a new tab 2. Navigate to https://www.linkedin.com 3. Login with your LinkedIn account that you use as a Microsoft employee 4. From the top navigation, select “Sales Nav” 

Key Learnings

In Exercise 1 the following concepts / technologies were addressed

1. Dynamics 365 is made accessible via the Office 365 portal experience
2. Dynamics 365 uses the persisted Azure Active Directory Identity, this enable users to have a Single Sign-On experience across all Active Directory based applications.

Related Microsoft Technologies

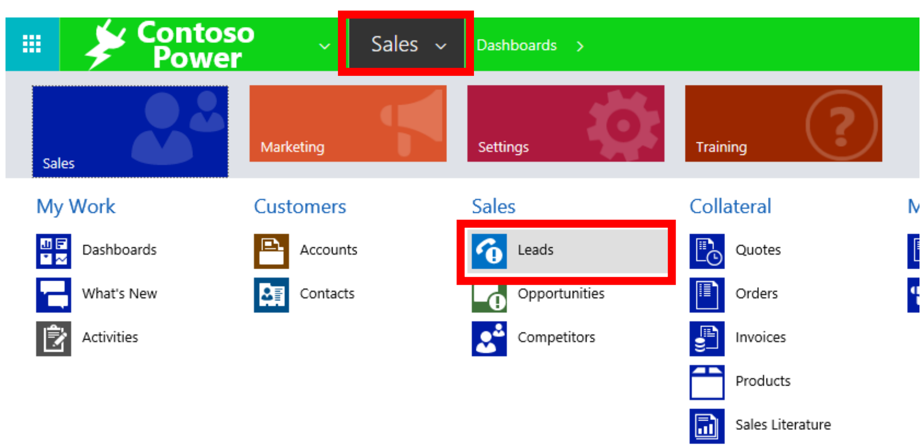
Technology	**Used For**
Azure Active Directory	Single Sign-On
Office 365	Subscription Hosting

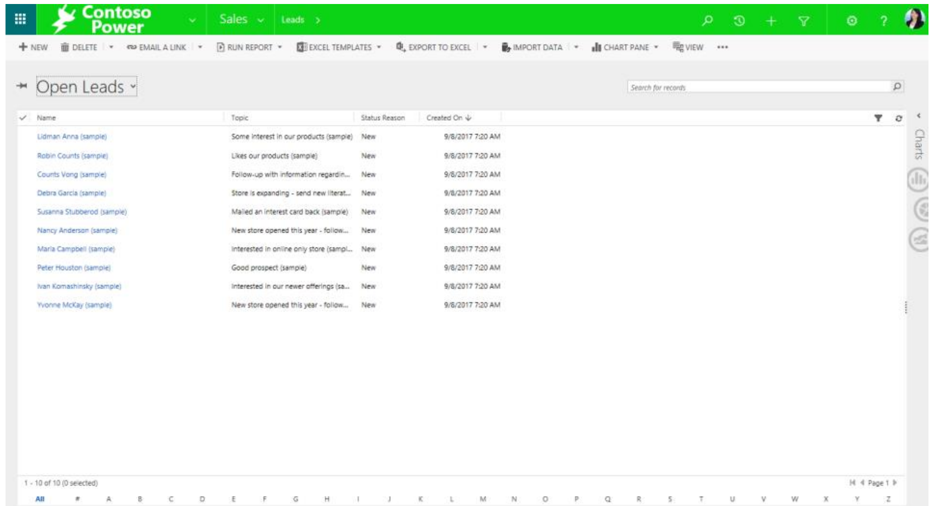
Exercise 2: Follow-up with Tradeshow Customers

Scenario

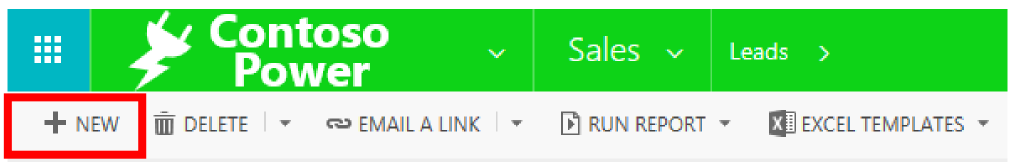
As part of the tradeshow that Molly participated in, she was tasked with meeting potential new customers and educating them on the products and services that Contoso Power provides. A key part of this education process is a “profiling form” that allows Molly and other Sales Reps to follow-up with key prospects at a later date / time.

It is important to note that, the profiling form and information would typically be implemented via the Microsoft Dynamics 365 portals and be captured in Dynamics 365 automatically. Portals go beyond the scope of this lab, and thus the information will be entered manually as part of this exercise.

Task	Detailed Steps
Enter a new Lead	1. Open the Dynamics 365 browser tab that you setup in Exercise 1 2. From the main navigation, select Sales and navigate to Leads  This will take you to the main Leads area of Dynamics 365. From this area, you are able to create new leads as well as view or modify any existing leads.



3. From the command bar, click the “New” button



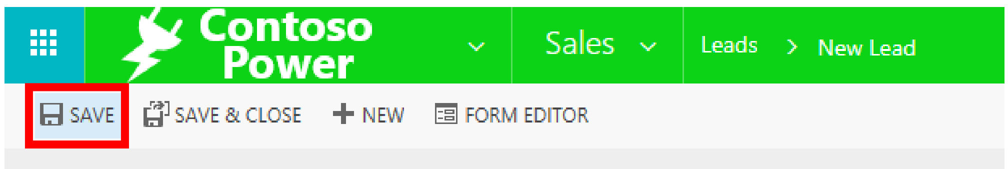
This will open a new Lead form, where you will start to enter the information that Molly captured at the tradeshow.

4. Enter the following information into the Lead form:

Field	**Value**	**Notes**
Topic	Interested in SmartHome Offerings	Required
Name	{Enter your name}	Required
Company	Microsoft	Required. This is a lookup field to an Account record in Dynamics. You do not need to create a new Account, simply select the Microsoft Account.
Job Title	{Enter your Job Title}	Required
Mobile Phone	{Enter your mobile phone}	Optional

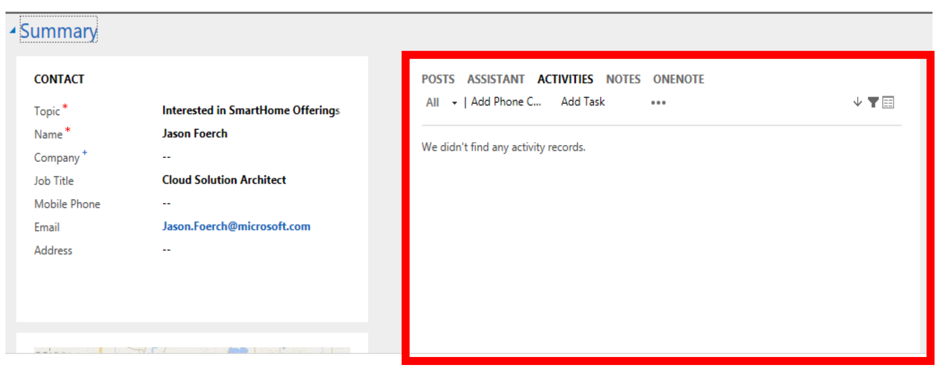
Email Address	{Enter your Microsoft Email Address} **Note: If you have an aliased email like first.last@microsoft.com, then you will want to use this email address.**	Required
Address	{Enter your Address}	Required

5. Click the Save button in the command bar to save your new Lead

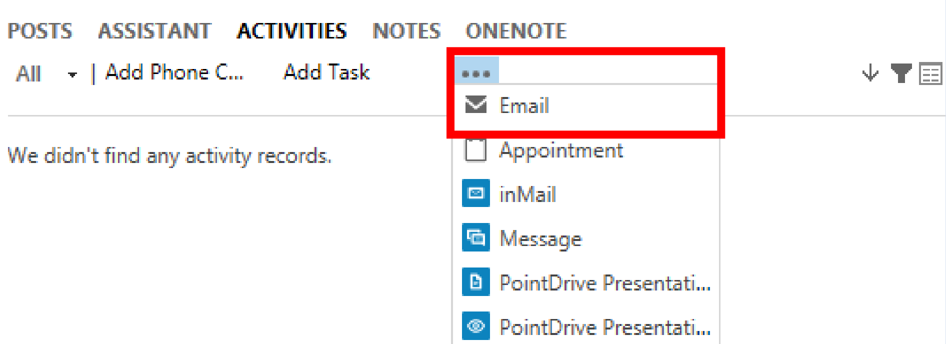


Send an Email to the new Lead

1. With your new Lead open, locate Activities pane in the center of the form



2. Click the elipses next to "Add Task" and select "Email" from the drop down menu

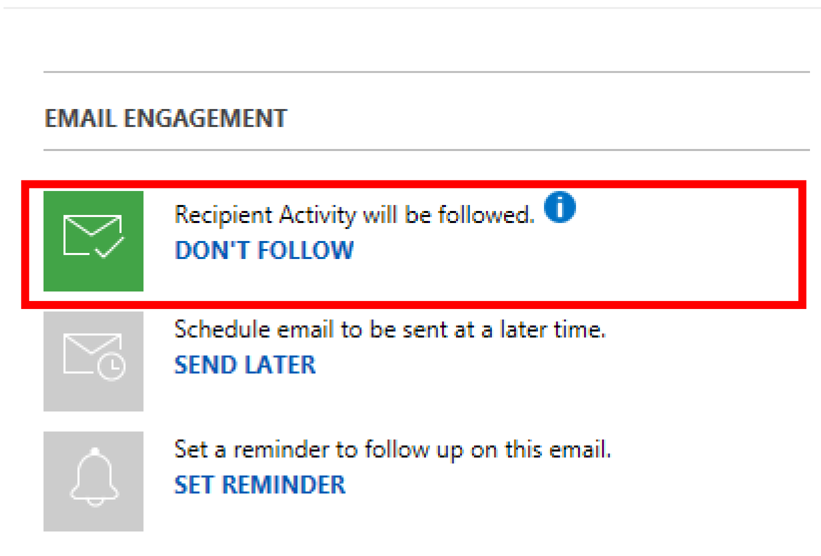


3. This will open a new email record inside Dynamics 365. Notice the following:

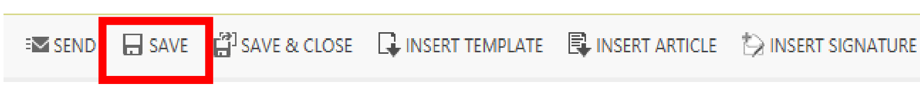
    A. The "To" field has already been populated for you
    B. Your email signature has already been populated for you.
    C. Under the "Email Engagement" section, the following has been automatically enabled
4. Enter the following details into the new Email form:

Field	Value	Notes
Subject	Following up on Home & Garden Show	Required
Email Body	{Enter a message within the email body}	Required

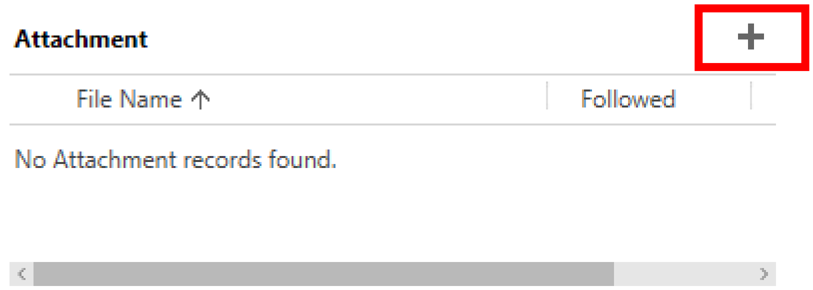
5. As noted above, Dynamics 365 will automatically follow this email. This will provide us the ability to see the opens, replies, link clicks, and document opens at a later date.



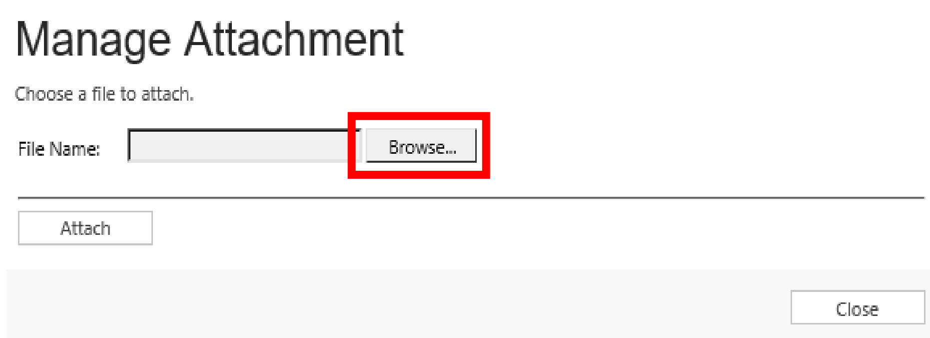
6. Click the "Save" button in the command bar



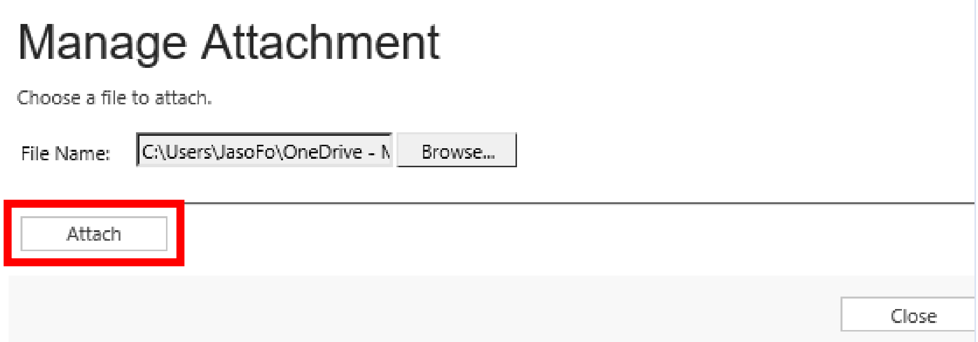
7. In the "Attachments" section, click the + icon to add an attachment to the email



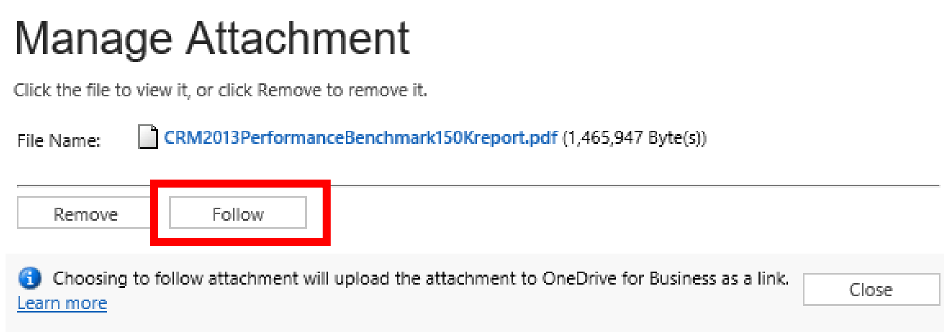
8. In the "Manage Attachment" window that is opened, click the Browse button to start browsing for a document on you local machine that you can attach to this email.



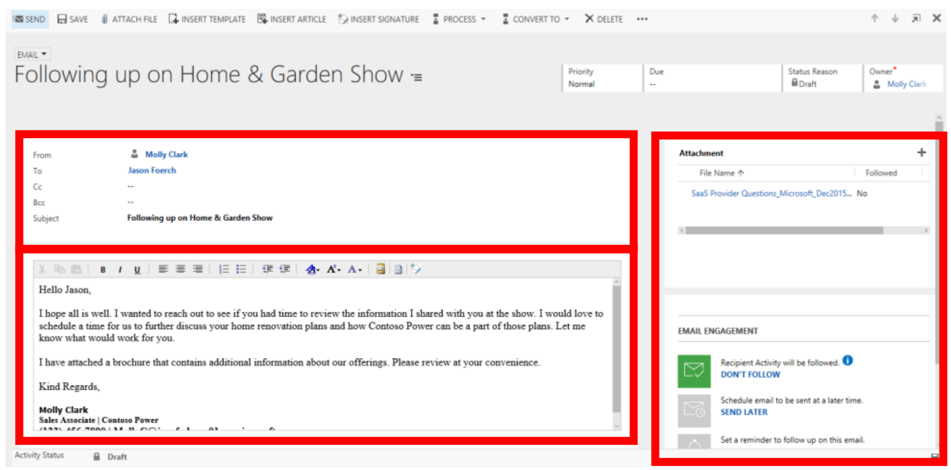
9. Once you have selected your file, click the "Attach" button



10. Once the document is finished being attached, click the "Follow" button. This will utilize OneDrive for Business to share the document with our customer and also track the opening of that document.



11. Your email should now look like the following:

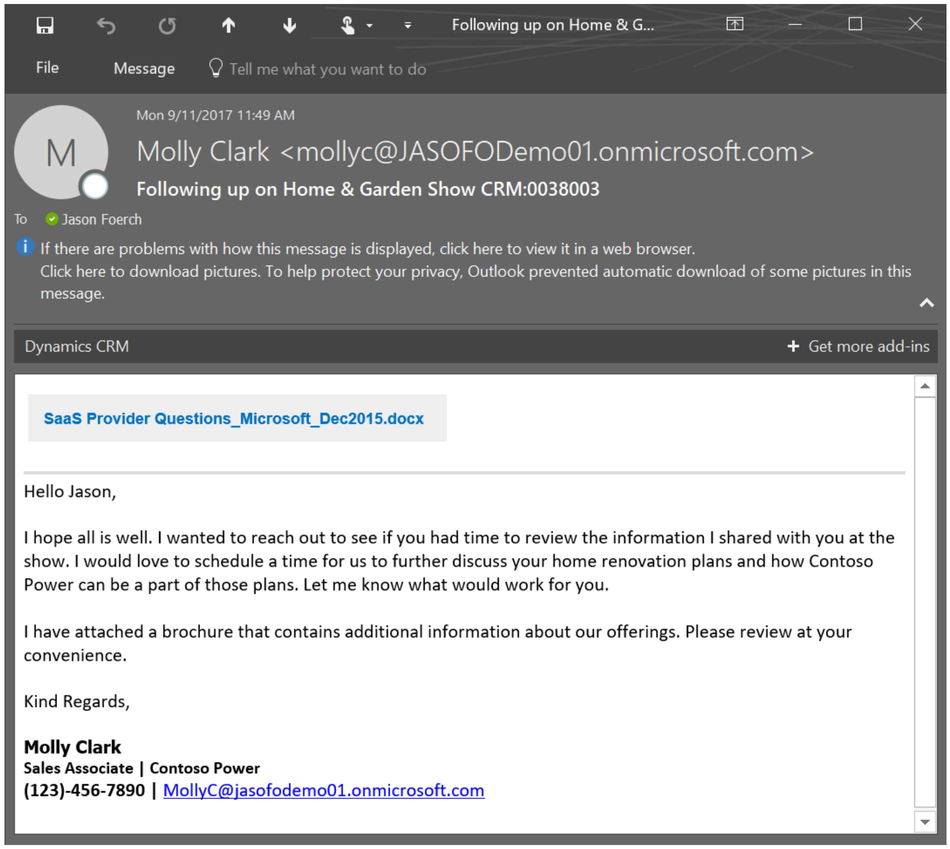


12. Click the "Send" button in the command bar

13. Dynamics 365 will go ahead and send the email to the email address that you specified for the Lead in the previous step. If you used your Microsoft email address, you should now have an email in your inbox. If you do not, keep updating your inbox until you get the email.

Reply to the email sent by Molly

1. In your Microsoft Outlook Account, open the email that you just sent yourself.



2. Open the Attachment that was sent to you.
3. Reply to the Email with the following message (note this is important as it will affect later parts of the lab):

   Hey Molly, Thank you for the email and the additional information. I would love to schedule a call for us to discuss this further. I need to get an idea about how much this will add to my project. I do have additional budget, and I love your solutions. I really want to get this added to our renovation plans.
4. In the Outlook email, click Send to have the email sent back to Molly.

Key Learnings

In Exercise 2 the following concepts were covered:

1. Basic navigation of Dynamics 365
2. Adding a new record to Dynamics 365
3. Sending and following an Email from Dynamics 365

Related Microsoft Technologies

Technology	Used For
Exchange Online	Sending emails
OneDrive for Business	Sharing / following documents outside of your organization

Exercise 3: Working the Opportunity

Scenario

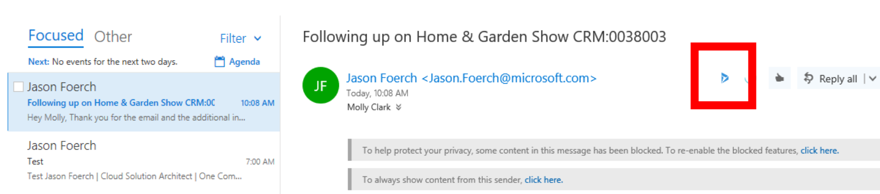
In the previous exercise we saw how we could create a new Lead within Dynamics 365. This allows us to track and maintain communication with this potential future customer. We also saw how Dynamics 365 works with both Exchange Online and OneDrive for Business to enable us to have intelligent email communications with our Leads and Contacts.

In this next exercise, we are going to see how we can utilize the intelligence of Dynamics 365 to better understand our customer and their likelihood of purchasing our products or services. As part of this process we will

1. Review the reply email from the customer (you).
2. Use the Dynamics 365 Process Flow to convert our Lead to an Opportunity
3. Utilize Office 365 groups to collaborate with other team members
4. Utilize OneNote to capture any specific notes that we have regarding our Opportunity
5. Utilize Dynamics 365 & Azure AI to gain better insights to our customer
6. Utilize LinkedIn to better understand our customer
7. Utilize Word to send out a proposal

<table>
<tr><th>Task</th><th>Detailed Steps</th></tr>
<tr><td>Track Reply from Customer</td><td>

Open the browser tab for Outlook that you setup in Exercise 1
You should see the new message that you sent as a reply in Exercise 2, if you do not, simply refresh the mailbox until you see it
Note: because this is a shared environment, you will also see emails from others that are going through the exercise. Please ignore those and only work with your email.
Select your replied email in the inbox.
In the preview pane, click the Dynamics 365 Add-in icon to launch the Dynamics 365 Add-in



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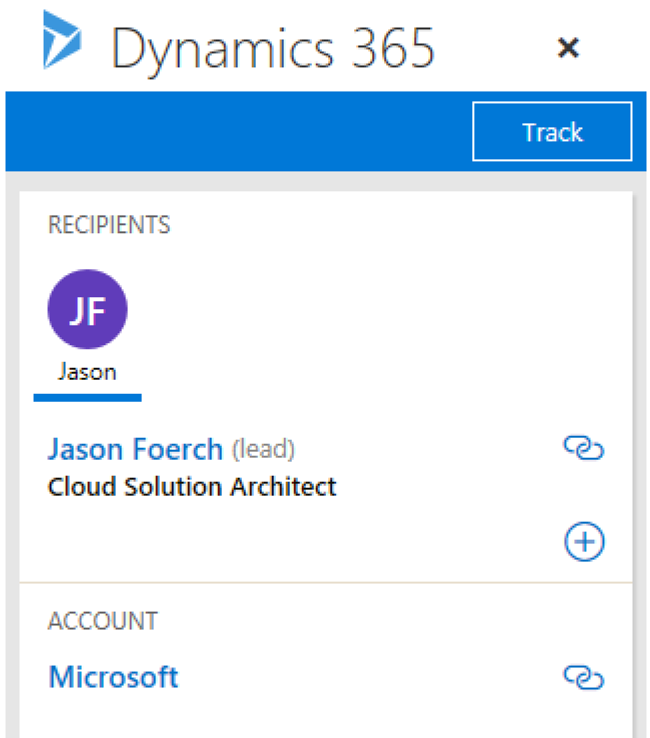
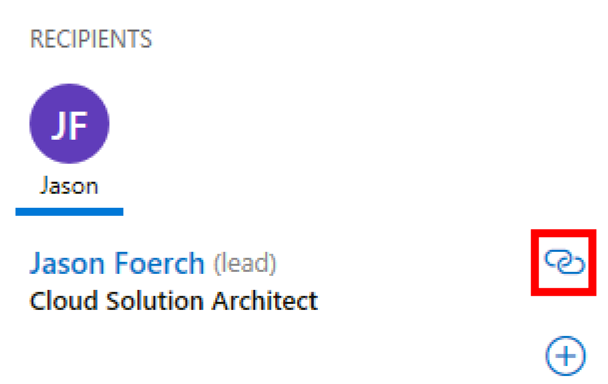
5. The Dynamics 365 Add-in will automatically take the context of the email and start surfacing details about this individual that you are interacting with.



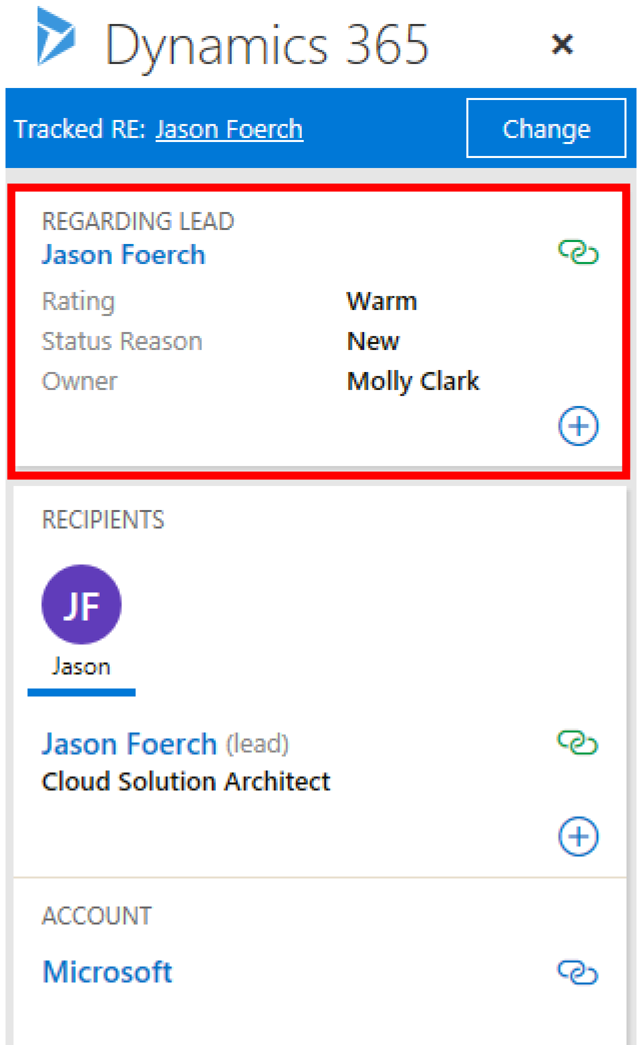
In this case, the add-in found the lead that you created earlier and is offering you the ability to quickly track the email. It is also surfacing the Account that you linked to the Lead, so that you can quickly navigate to get more details. As we interact with this customer further, the information in this window will continue to "build out" giving us more insights at our finger tips. Lets track the email.

6. Click the "Link" button next to the Lead record in the Dynamics 365 add-in



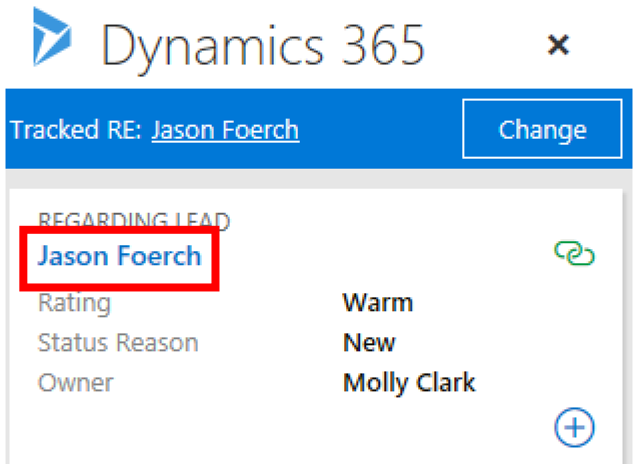
7. The Dynamics 365 add-in will automatically copy the entire contents of the email into Dynamics 365. This helps when looking to gain a single 360 degree truth of

	the customer (in this case capturing one of our interactions). The add-in will automatically update with the new information (the regarding Lead).

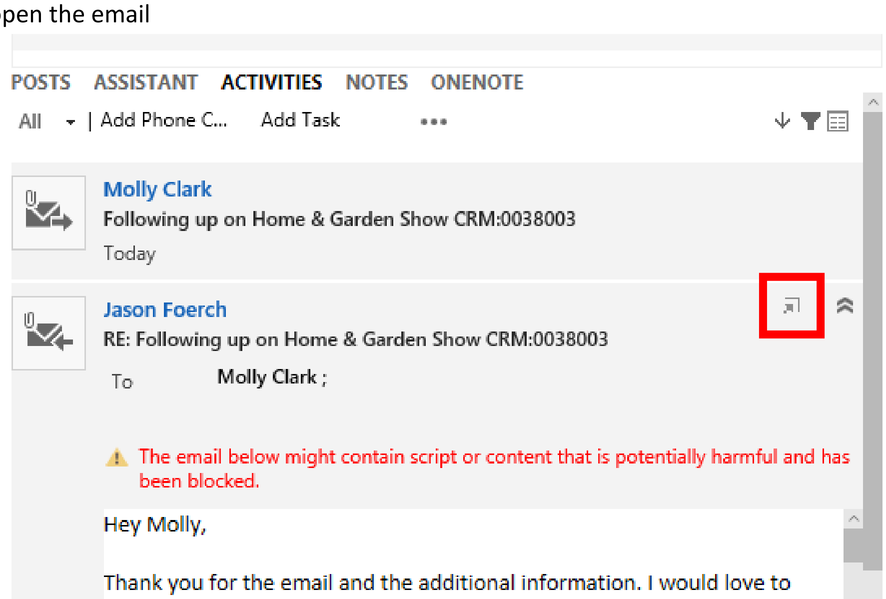


Review the Email Engagement details in Dynamics 365

1. From the Dynamics 365 Add-In click the blue link to your Lead record

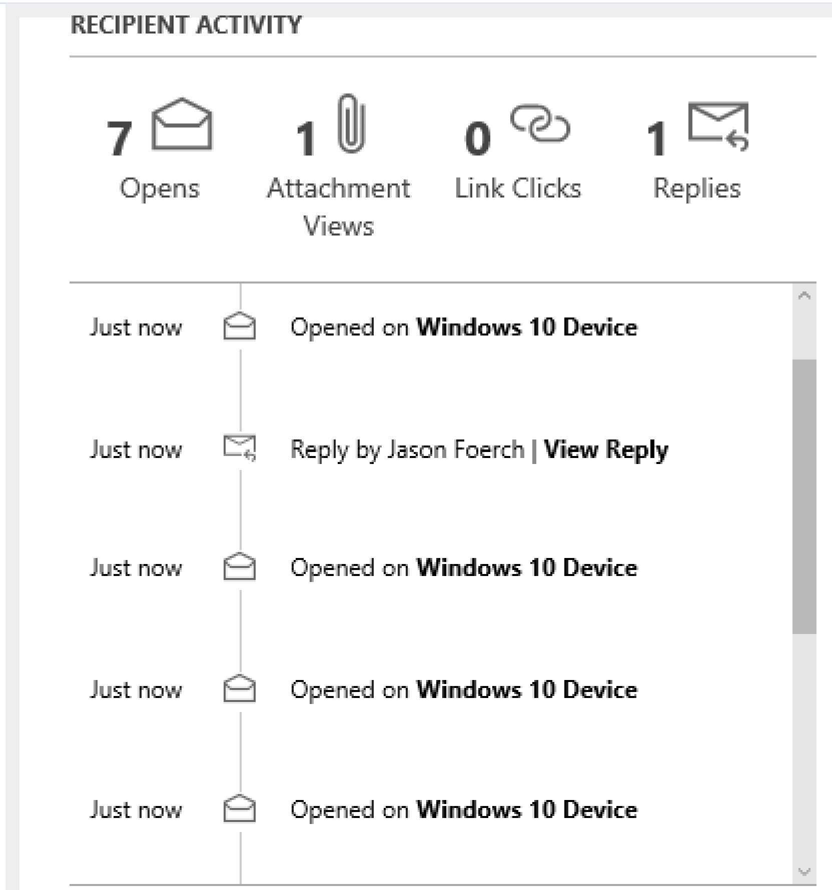


2. This will open your Lead in a new window
Note: The Edge pop-up blocker may block the pop-up. If this is the case click "Always Allow" to prevent this from happening again in the lab.
3. On the Lead form take note of the changes that have occurred to the Activities area. You should notice the following:
   A. The Relationship assistant is telling you some new valuable information
   B. The email that you tracked from Outlook is now in Dynamics 365
4. Find and select the reply email in the activities list and click the pop out button to open the email

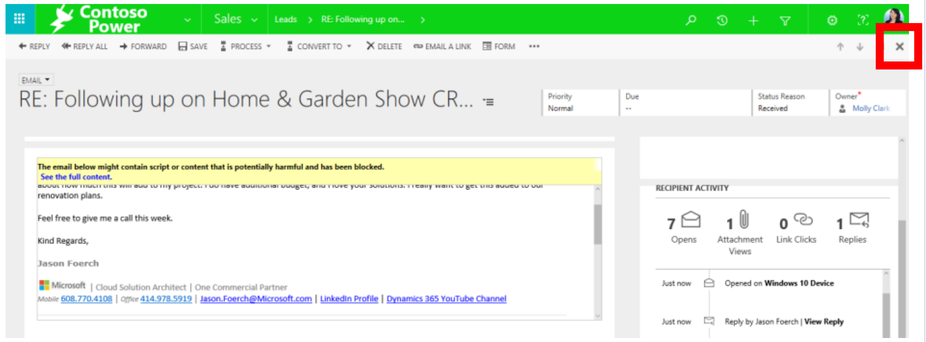


This will open the email record in Dynamics 365.

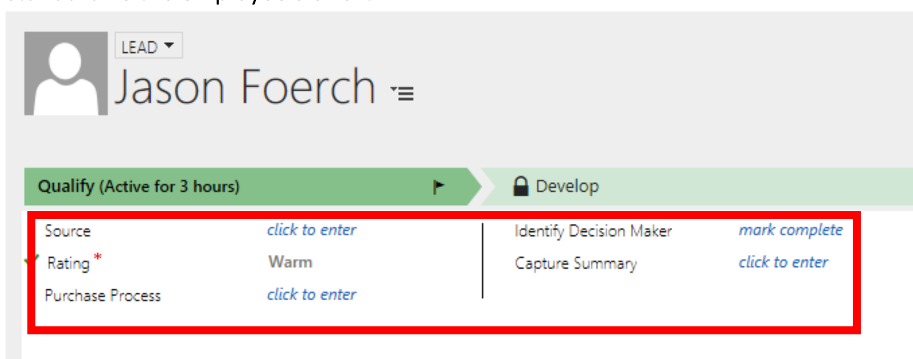
5. Notice the Recipient Activity has changed to reflect how you interacted with the email inside of your Outlook.

	 Because we followed the email originally, we can now see how many times the email was opened. Additionally, because we used OneDrive for Business, we can see how many times the attachment was opened / viewed. From a sales perspective, this is extremely valuable information that I will use when I make my follow-up phone call to the customer. Traditionally Sales is blind to how customers engage with email once it leaves the Exchange server. Dynamics 365 brings insight into this conversation with its ability to track all email engagements.
Covert the Lead to an Opportunity	1. Since our potential customer is in fact interested in continuing this conversation and is also looking to get some pricing information, it is now time for us to convert the Lead to an Opportunity.

2. Close the email activity by clicking the “X” in the top corner of the record



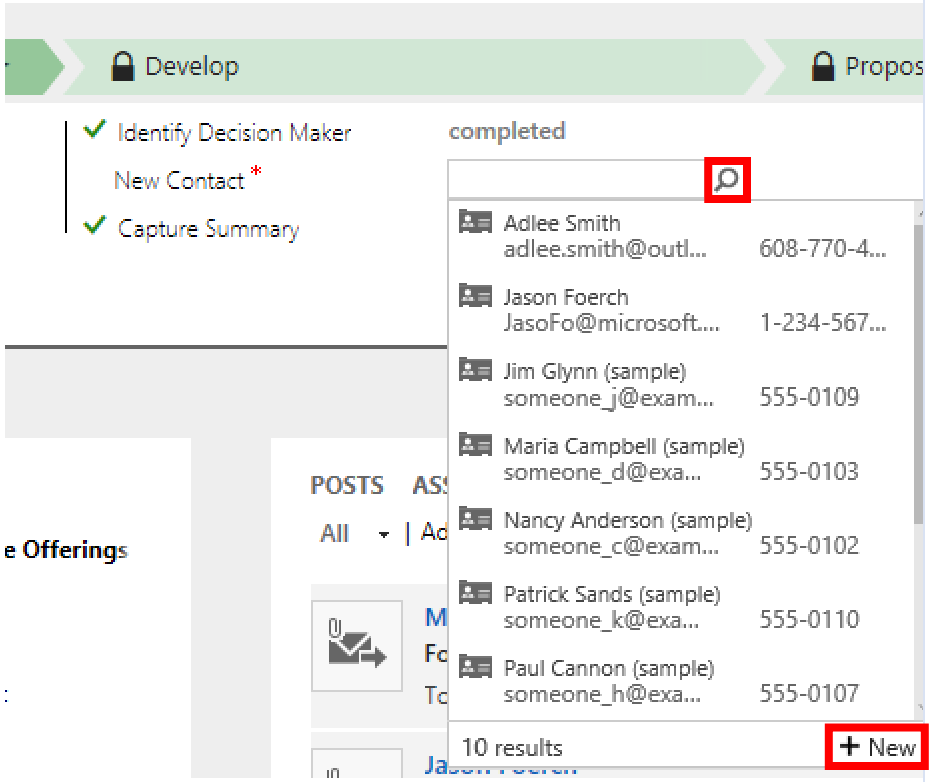
3. This should take you back to your Lead record
4. Before we can Qualify this Lead to an Opportunity, we must complete some of the information in the business process flow. The business process flow enables organizations to implement consistent processes that help to simply / standardize the employee’s effort.



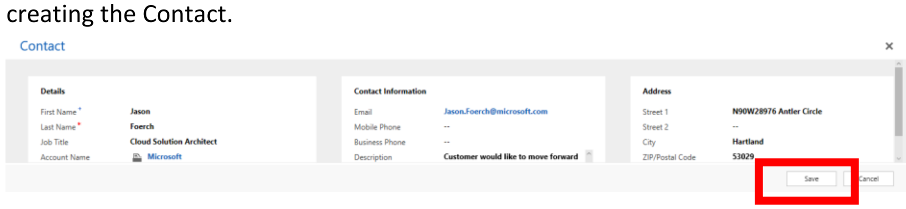
5. To do this simply update the business process flow with the following information:

Field	Value	Notes
Source	Tradeshow	Required
Rating	Hot	Required
Purchase Process	Individual	Required
Identify Decision Maker	Completed	Required
Capture Summary	Customer would like pricing.	Required

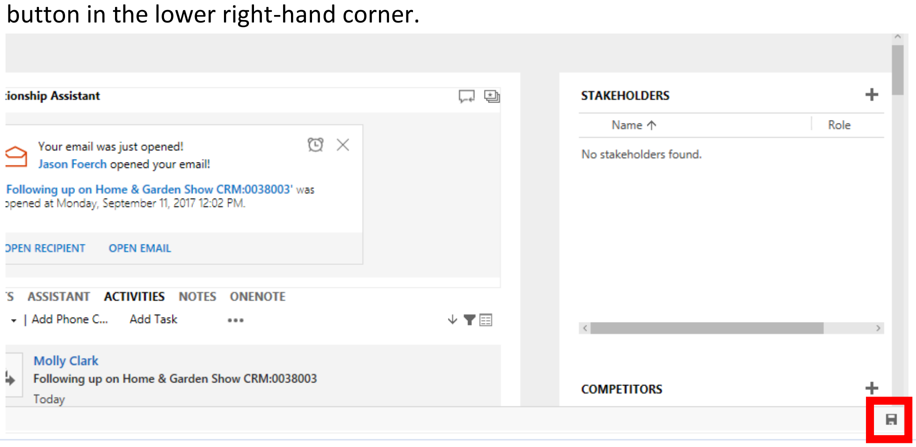
6. The last field that we need to enter is the “New Contact”. To do this, click the magnifying lens button and click the “New” link in the drop down.



7. This will launch the Contact Quick Create form with most of the information already populated from the Lead. Click the “Save” button to continue with creating the Contact.



8. Save the changes that you made in the Leads process flow, by clicking the Save button in the lower right-hand corner.



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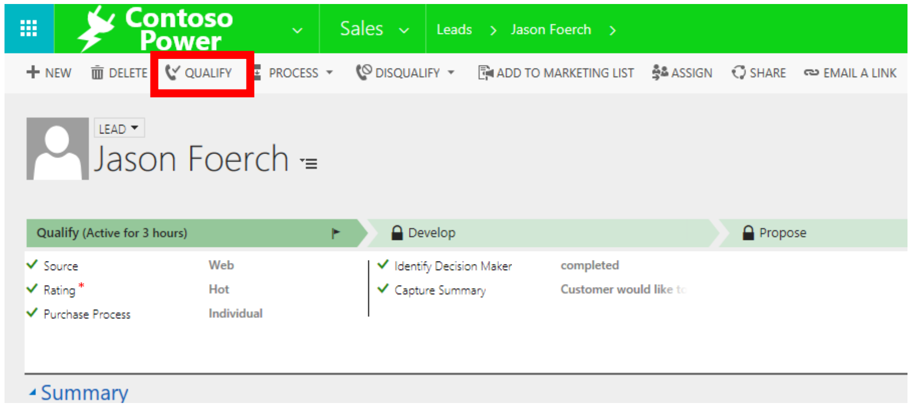
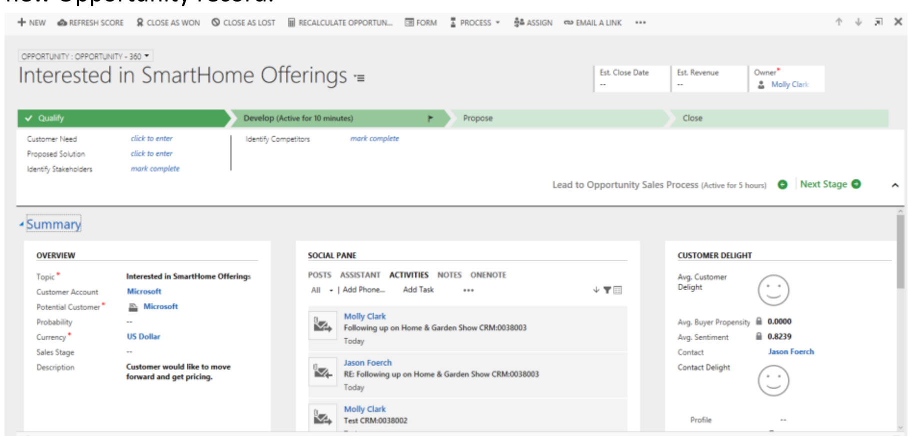
9. Now that our process is complete, we can move onto the next stage of the process which is “Develop”. To do this, we will Qualify the Lead into an Opportunity. Click the “Qualify” button in the command bar.



Note: This will not give a status indicator as to the progress of the qualification. Be patient and the system will return with new information for the next step.

10. When the qualification process completes the window will be redirected to the new Opportunity record.



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Update Opportunity information

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1. Now that we have our Opportunity record, we can start adding information as it relates to the overall amount of business that we can expect to gain by winning this customers business. This helps to drive the Sales Pipeline that management will use in a later exercise.
2. To update this information, we need to enter both the Estimated Revenue and the Estimated Close Date. This information would be captured as a result of working closer with the customer. For purposes of this exercise, we will go ahead and add an arbitrary Estimated Close Date.
3. Locate the Estimated Close Date field in the header of the form.

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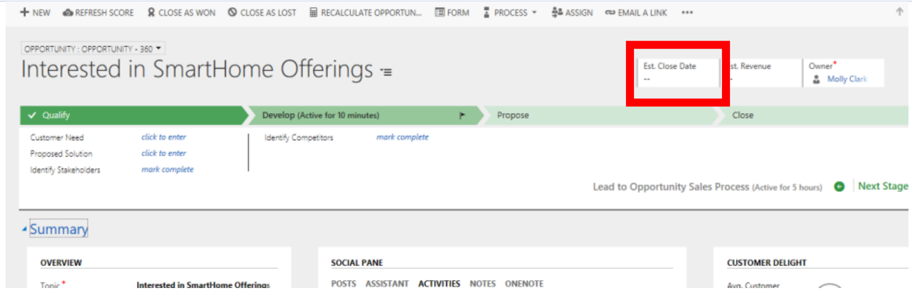
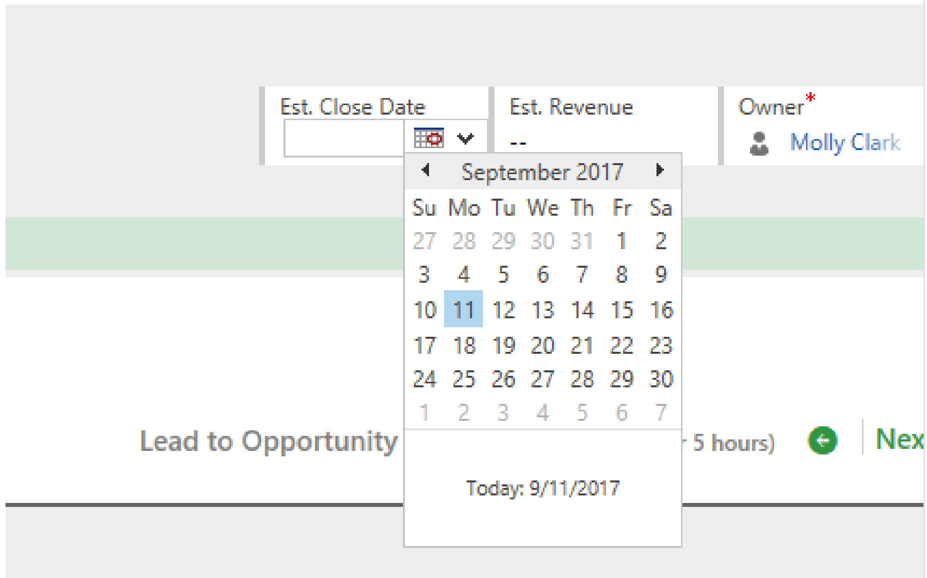
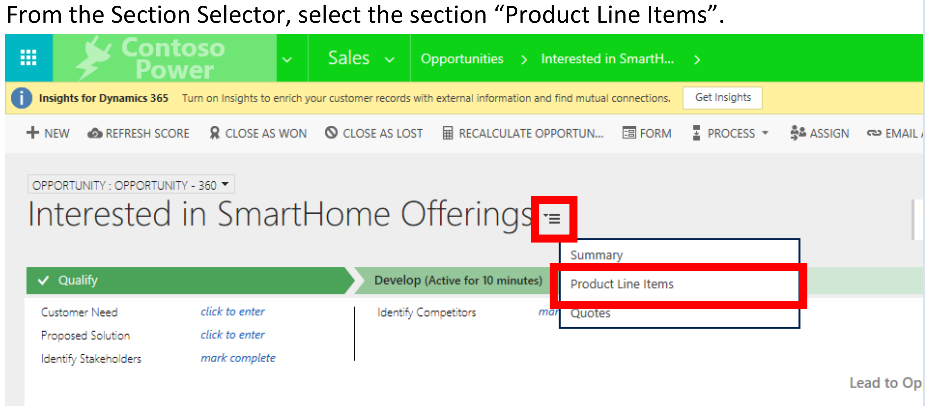


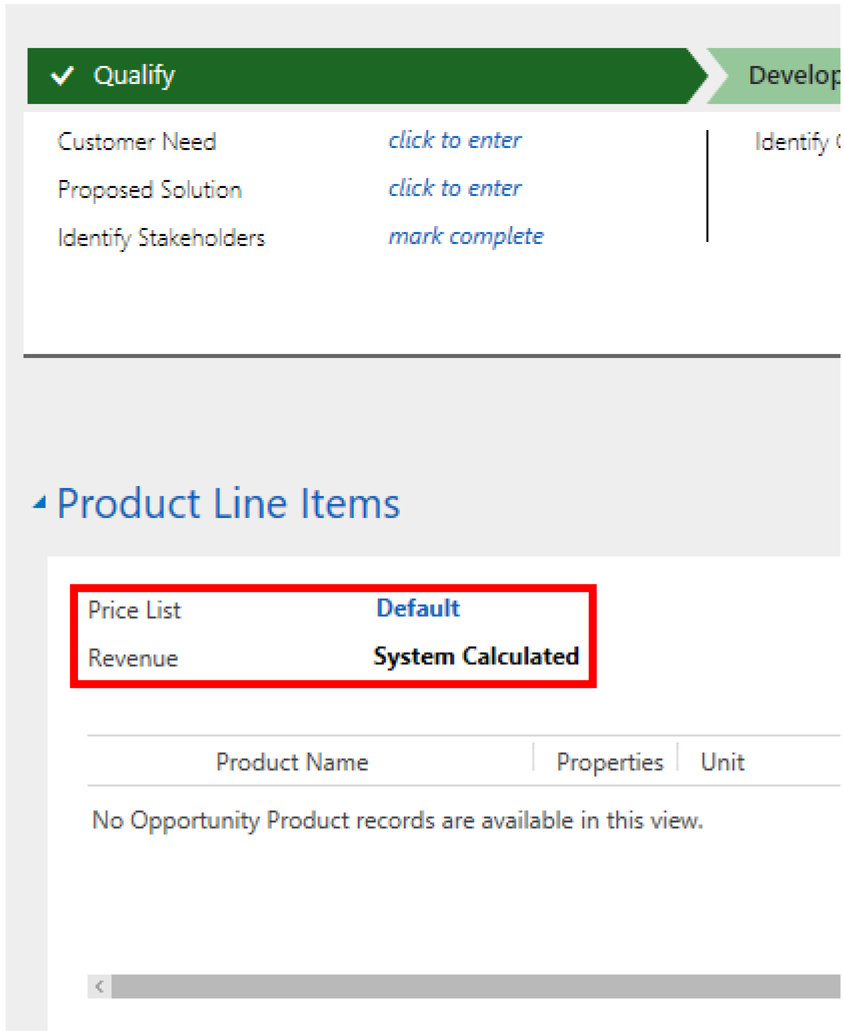
4. Select a future date from the calendar drop down.



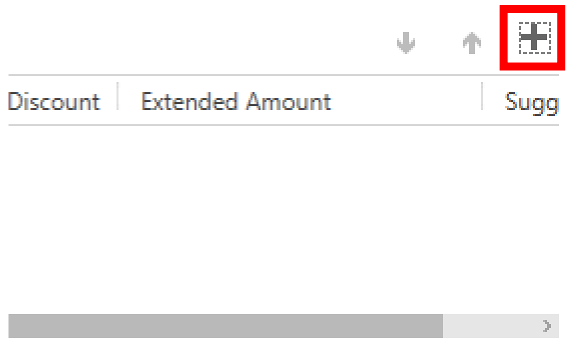
5. From the Section Selector, select the section “Product Line Items”.



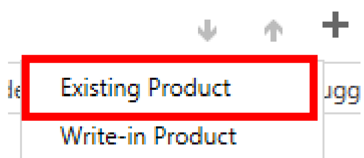
6. This will take you to the Product Line Item section on the form where we can start entering in information related to the estimated revenue. Make the following changes:
   A. Set Price List to: Default
   B. Set Revenue to: System Calculated.



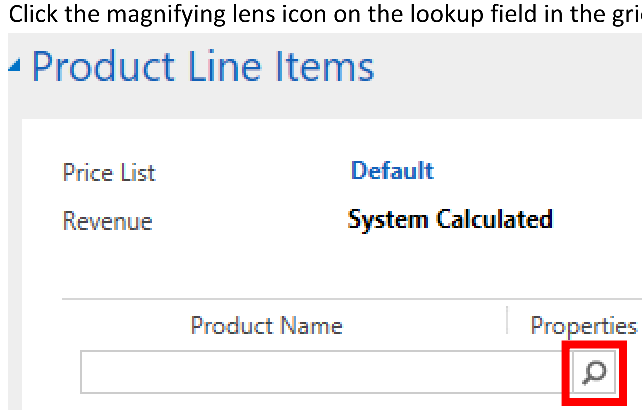
7. Next we need to add the products that our customer is interested in. To do this, follow these steps:
   A. Click the “+” icon above the products grid



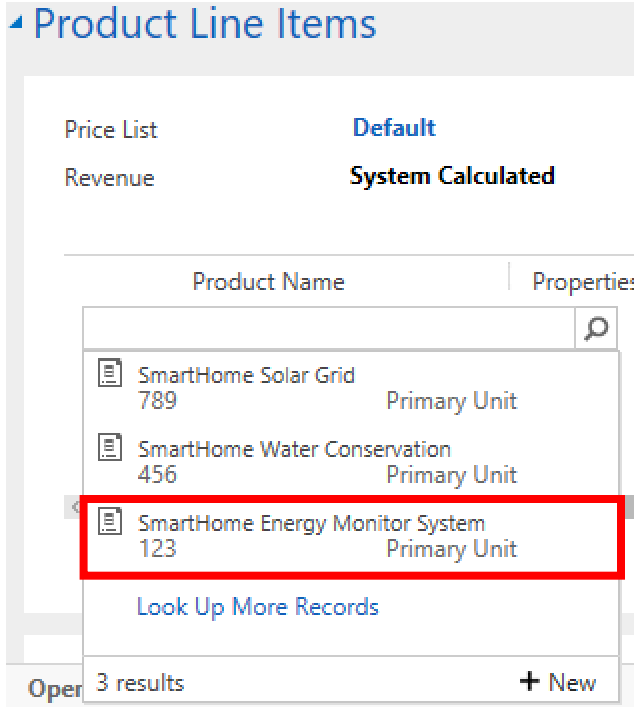
   B. Select “Existing Product”



   C. Click the magnifying lens icon on the lookup field in the grid

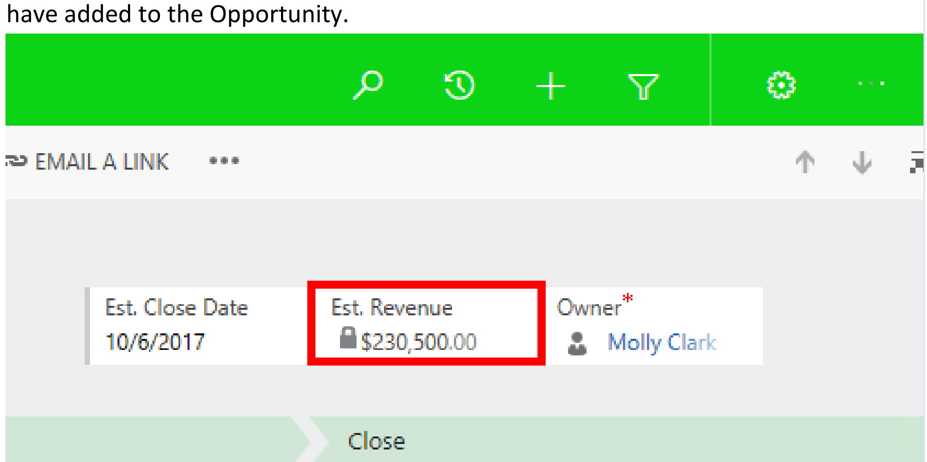


D. Select “SmartHome Energy Monitor System” from the drop down



E. Your product has now been added

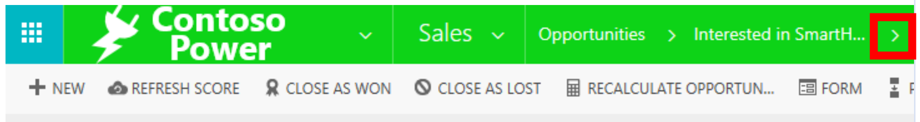
8. Now repeat steps A – E above adding additional products to this Opportunity. As a bonus, try changing the quantity of one of the items. Hint: the grid is editable.
9. Notice how our Est. Revenue has now changed to reflect the products that we have added to the Opportunity.



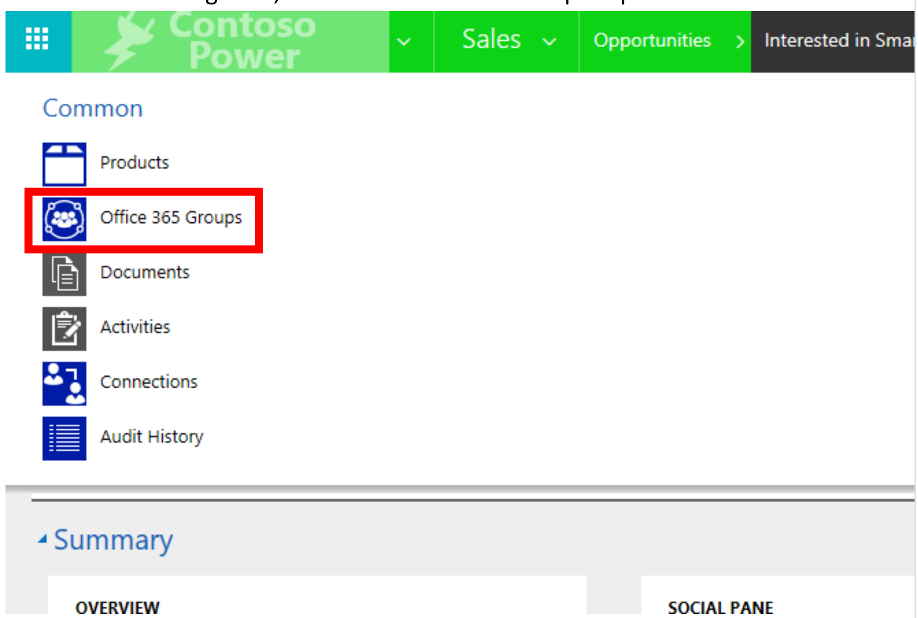
Collaborate with other Team Members	Now that we have a better understanding of the products that our customer is interested in, we can go ahead and engage with our engineering team to get the proper installation documents drawn up for our customer.

Unfortunately, our engineering team uses a different system than Dynamics 365 for their work and thus are not users within the system. To solve this collaboration gap, we can use Office 365 Groups. This allows our Sales and Engineering teams to communicate and collaborate on projects together.

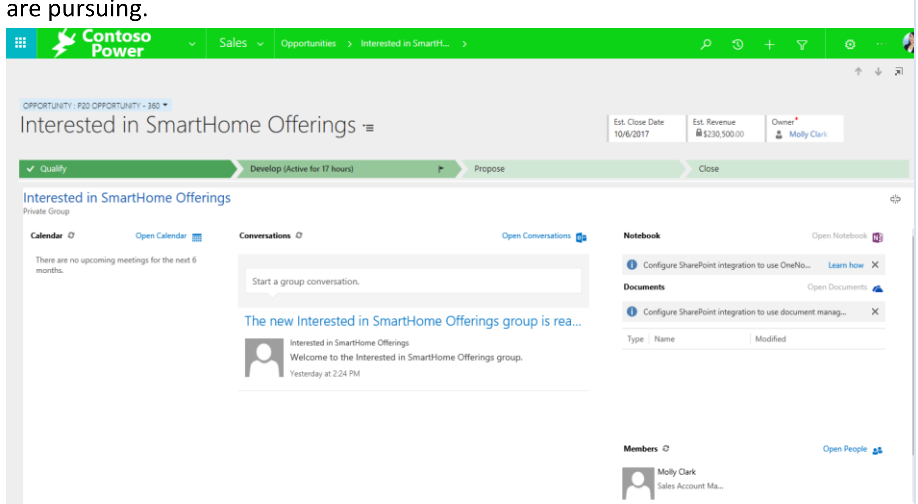
1. To access the Office 365 group for this Opportunity simply click the ">" sign next to your Opportunity name in the main navigation bar:



2. From the Sub Navigation, click the "Office 365 Groups" option



3. This will load the Office 365 Group that is unique to the Opportunity that you are pursuing.



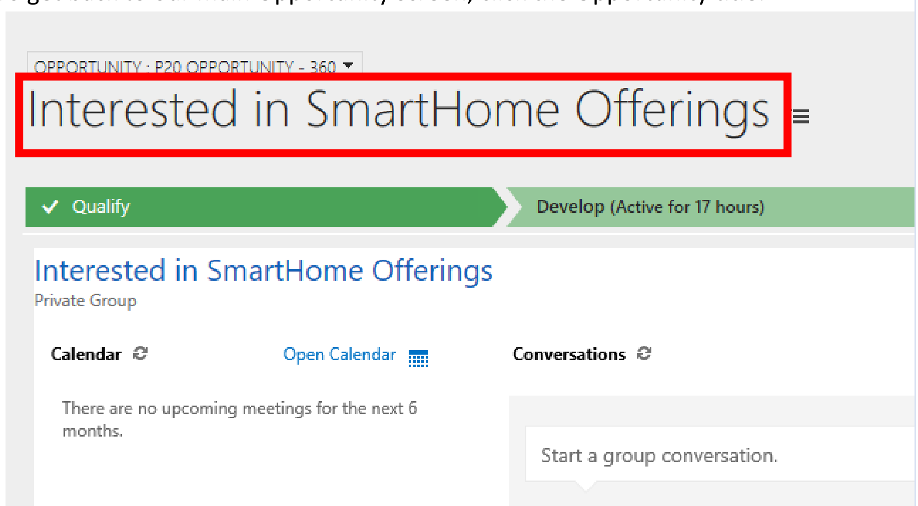
4. With Office 365 Groups, we now can:
   A. Add other members
   B. Participate in conversations that are unique to this group
   C. Share Notebooks and Documents
   D. Access a shared team calendar to track key milestones.

Capture centralized notes

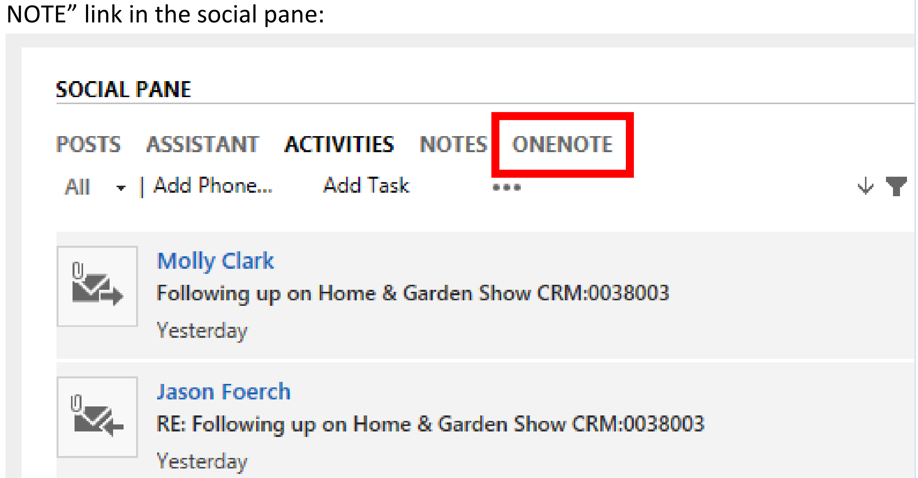
Dynamics 365 offers the ability to capture notes that are stored within Dynamics 365. The downfall to this functionality is that the notes can only contain text and cannot be accessed outside of Dynamics 365.

In some cases, this is not acceptable, so to solve this Dynamics 365 embeds One Note directly into the application. Let's take a look at how this works.

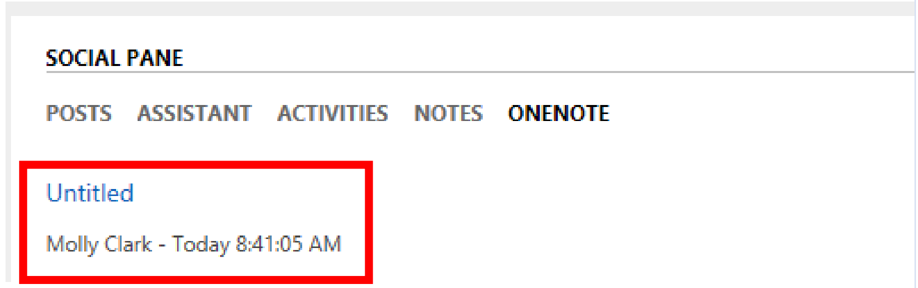
1. To get back to our main Opportunity screen, click the Opportunity title:



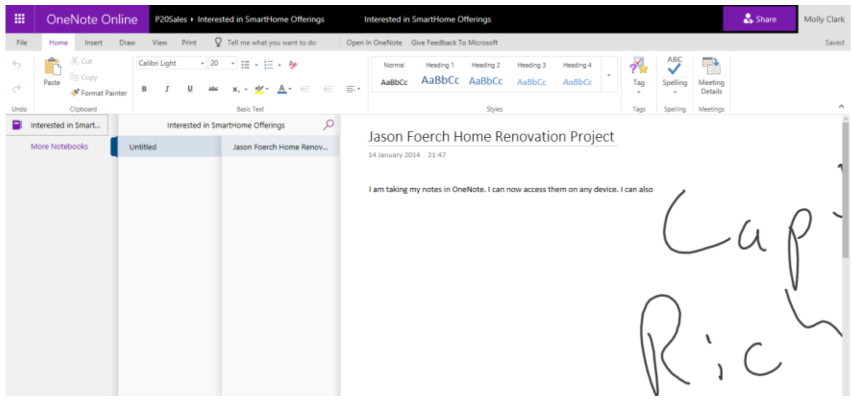
2. Once back on the main form, we can now access the Social Pane. Click the "ONE NOTE" link in the social pane:



3. Once the notebooks have loaded, click the "Untitled" notebook to open One Note and start taking notes:



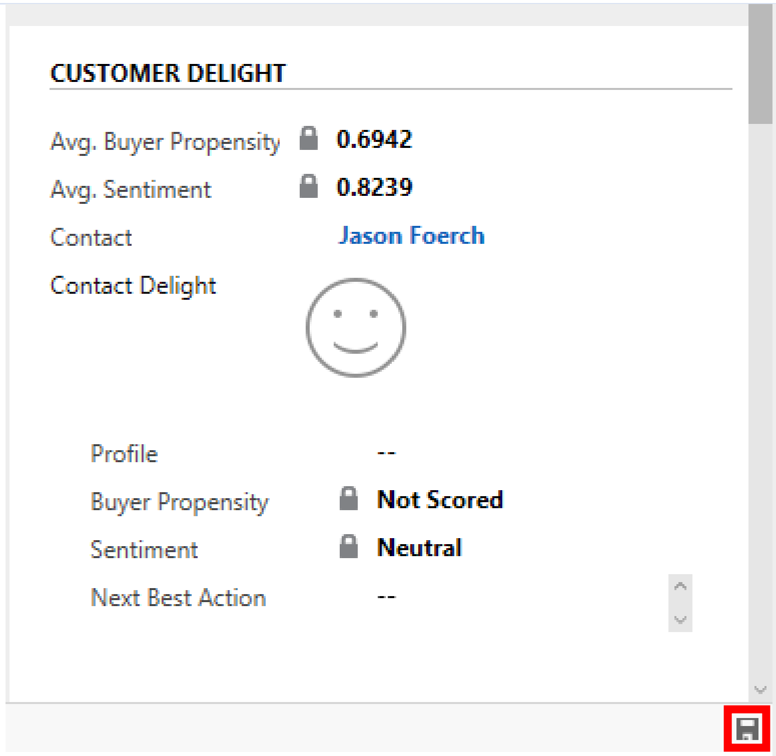
4. Here is what the experience will look like:



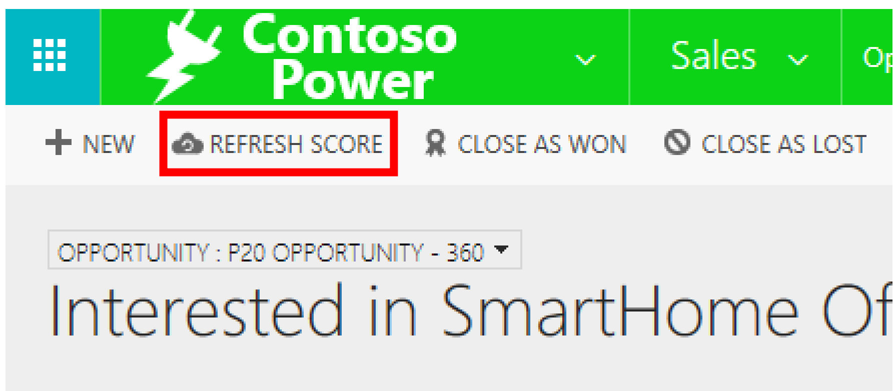
Calculate our Opportunity Strength

With Azure ML we have the ability to get a better understanding of the data in our system. In this case, we can better understand the strength of our Opportunity that we are pursuing. In this case, with Azure ML, we can reason over all our historical Opportunity information to understand how likely we are to win this Opportunity (business). Let's look at how we would achieve this.

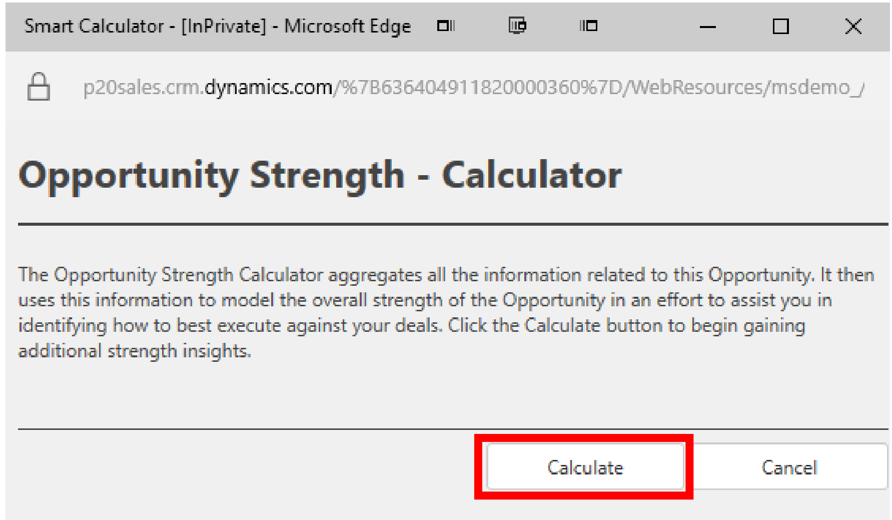
1. Now that we have updated some of our Opportunity information, we are ready to start the scoring process. First make sure all your changes are saved by clicking the save button in the bottom right hand corner.



2. Now click the “Refresh Score” button in the command bar

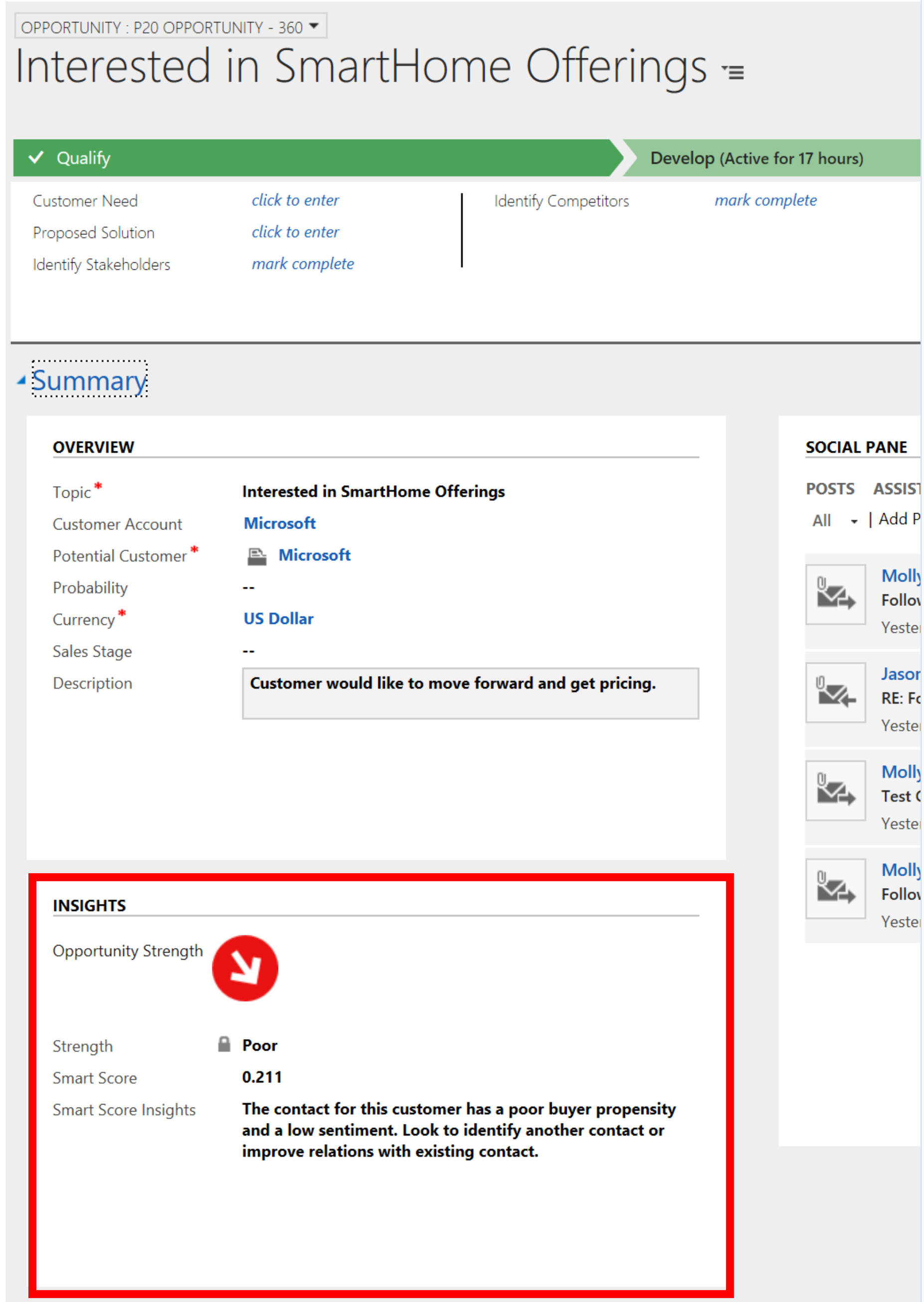


3. This will open the Opportunity Strength Calculator dialog. Click the "Calculate" button



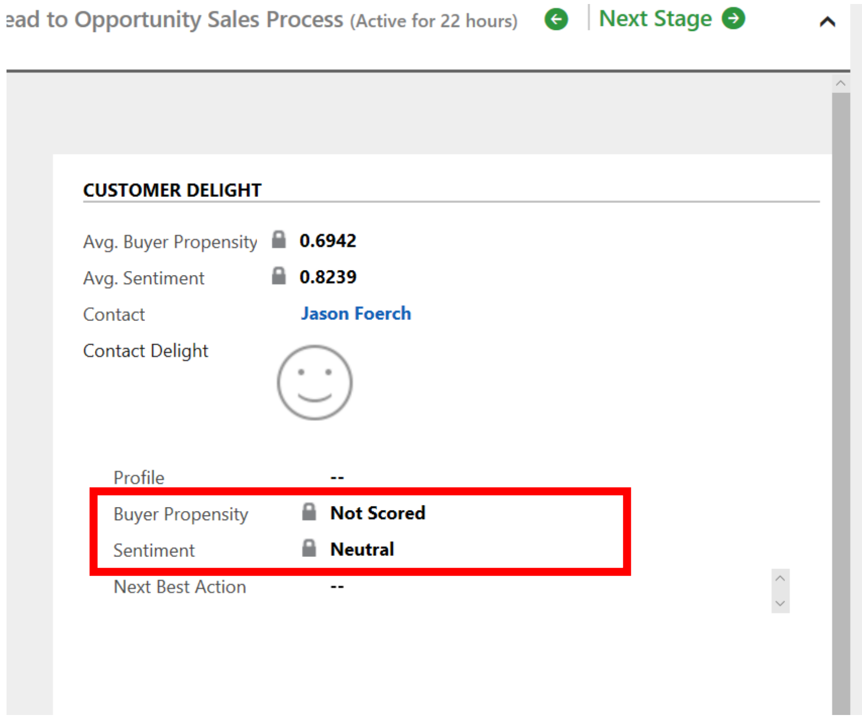
4. Once this is finished, the calculator will close, and your Opportunity will be refreshed.

5. Now that we have run the calculator, let's look at the INSIGHTS section to see the results:



6. Notice our Strength has been rated as being poor. More importantly let's look at why this has been rated as poor. In this case, the Machine Learning logic is telling us that our customers buyer propensity is low and this is affecting our ability to close this Opportunity as Won (close the business).

7. Let's look at the Customers Buyer Propensity by looking at the CUSTOMER DELIGHT section on the Opportunity form.



8. Notice our Buyer Propensity has not been scored yet for our customer. Also notice that the overall sentiment for this customer is neutral. We will take a deeper look at how this is measured next.

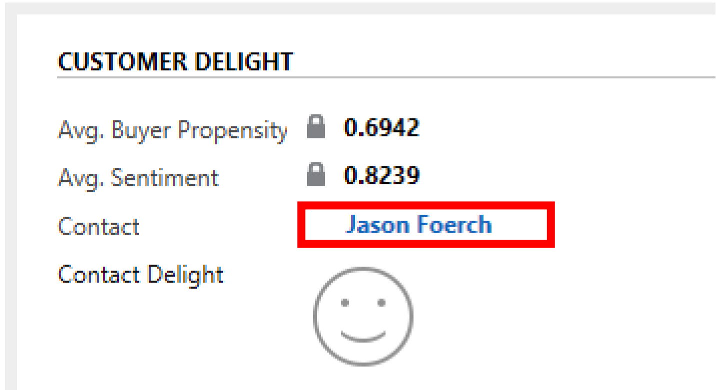
Update our Customers Buyer Propensity

In our previous steps, we saw how we could score the strength of our Opportunity with Azure ML, to better understand how likely we are to win the business.

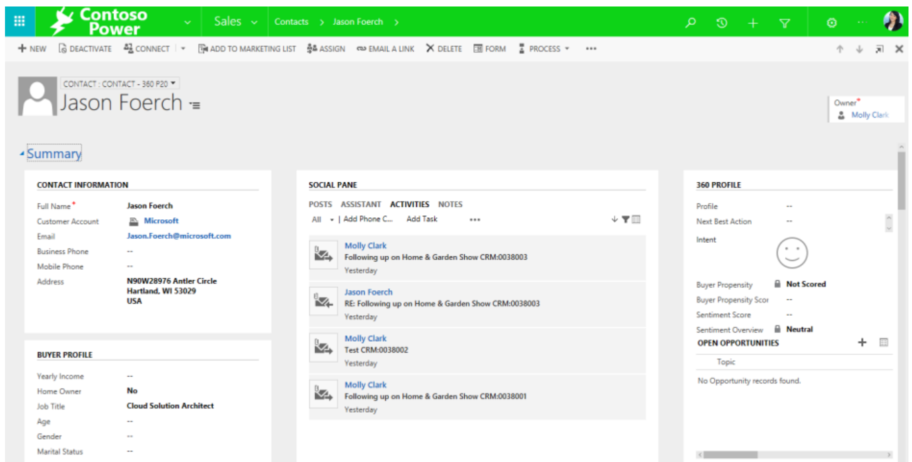
In that exercise, the Azure ML indicated that we were not likely to win the business because we didn't have a good understanding of how likely our customer is to buy our products.

Fortunately, we can easily fix this by utilizing the power of Azure ML to understand our customers buyer propensity. Let's take a look at how we can do this.

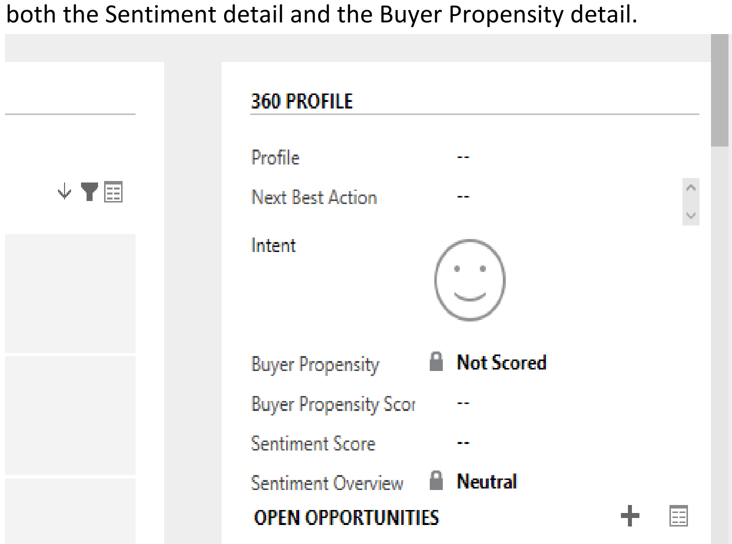
1. Within the Customer Delight section, click your Contact's Name:



2. This will navigate you to your Customer's record within Dynamics 365.

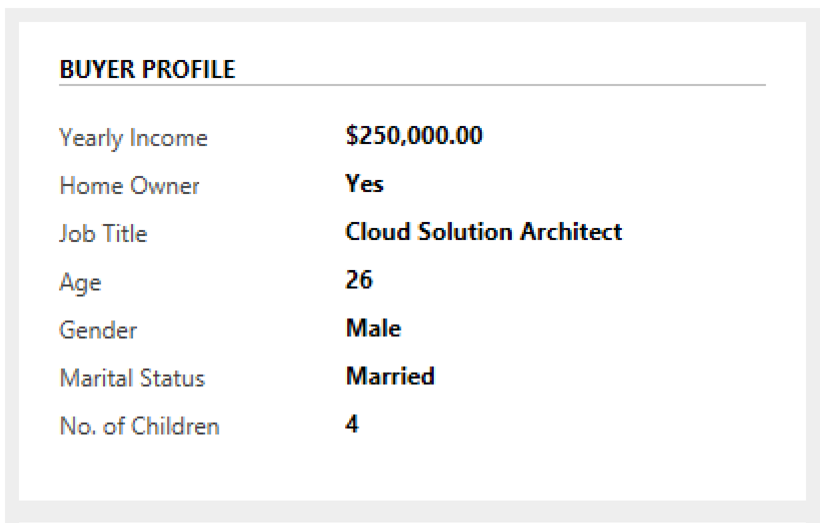


3. Notice the 360-profile section on the left side of the page. This section shows us both the Sentiment detail and the Buyer Propensity detail.

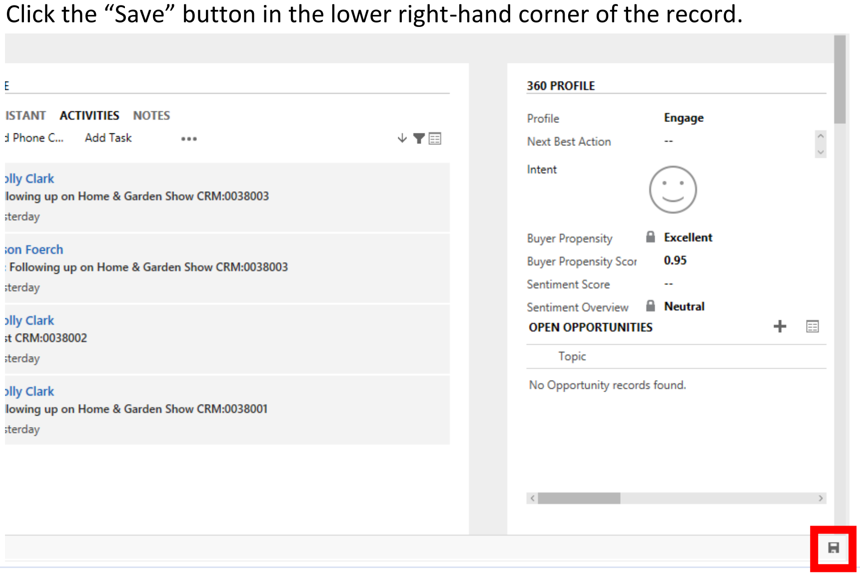


4. In order for us to receive a Buyer Propensity score, we must update the Buyer Profile for our customer. To do this, update the following fields on the Contact:

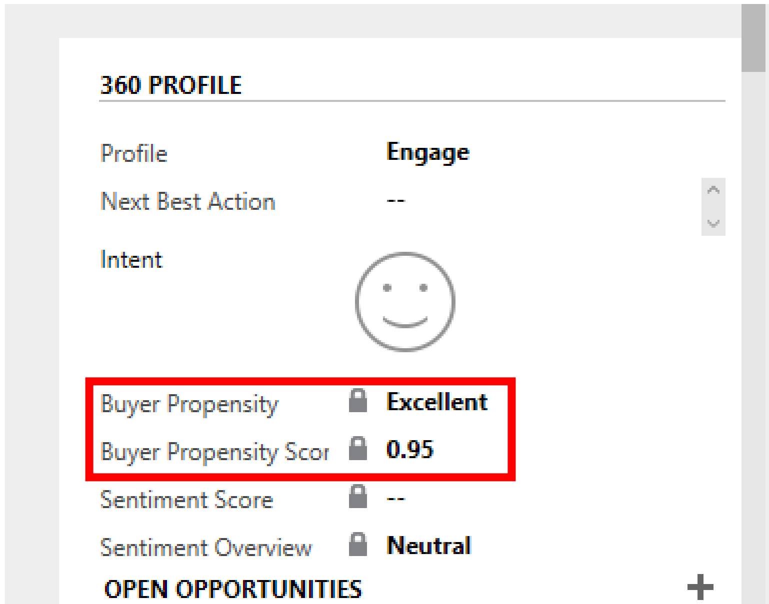
Field	Value	Notes
Yearly Income	{Enter a six figure amount}	Required
Home Owner	Yes	Required
Age	{Enter your Age}	Required
Gender	{Enter your Gender}	Required
Marital Status	{Enter your marriage status}	Required
No. of Children	{Enter the amount of children you have}	Required



5. Click the “Save” button in the lower right-hand corner of the record.



6. Notice our Buyer Propensity Score has now been updated based on the information we entered in the buyer profile.

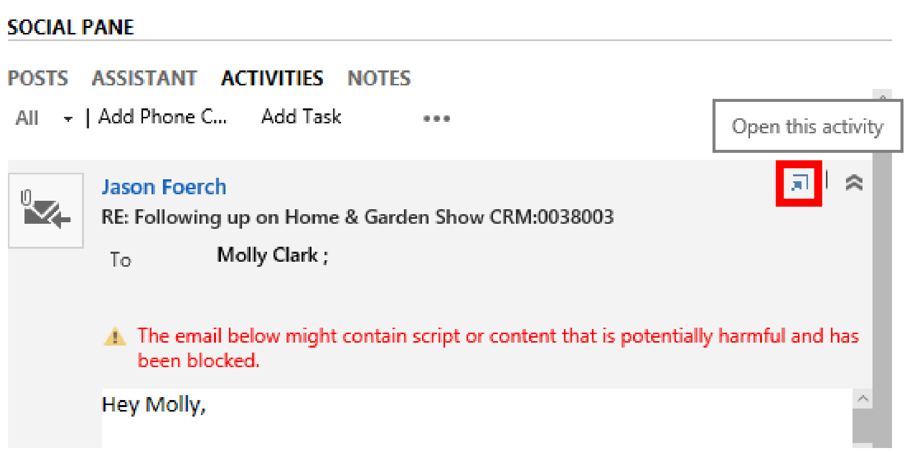


Understand our Customers Sentiment

A key component to being an effective seller, is understanding how your customer is perceiving you and your company. There are many ways that you can go about doing this, but one of the more effective ways is to understand the sentiment of the interactions that we have with our customers.

With Azure ML or Cognitive Services, we can quickly and easily start assessing the sentiment of the emails that we are receiving from our customers. Let's take a look at how we can do this in Dynamics 365.

1. Open the most recent email from your customer by clicking the pop-out button on the email.



<table>
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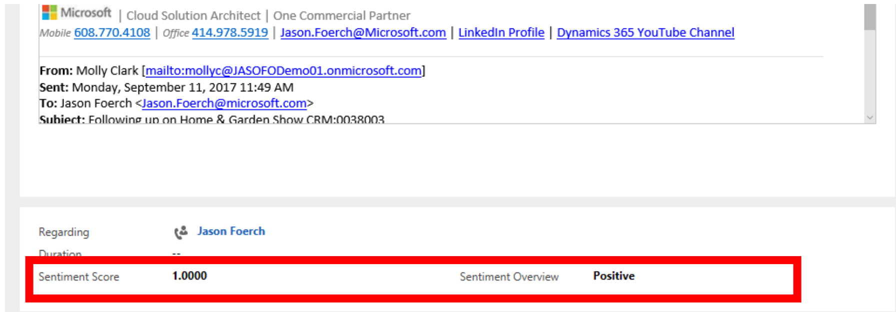
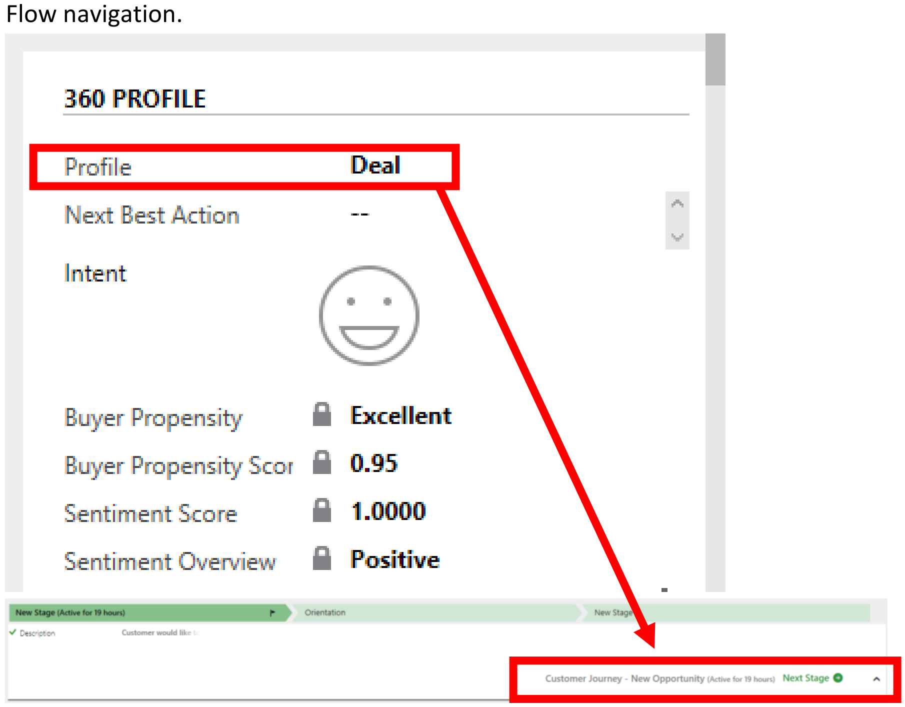
2. On the email form, scroll down to view the Sentiment for this email



3. Notice the Azure Machine Learning has given your email a score and an overall overview of whether your customer is communicating with positive, neutral, or negative sentiment. This is then rolled up to each contact to get an overall average sentiment for the contact.
4. To further test this, you can simply send biased emails to mollyc@jasofodemo01.onmicrosoft.com. When Dynamics 365 receives the email from Exchange, it will go ahead and pass it over to the Azure ML service for scoring. The results of this service will be stored in Dynamics for you to view.
5. The combination of Sentiment and Buyer Propensity allows Dynamics 365 to identify the proper Customer Journey for each individual contact. In this case, the Customer Journey is being defined in the Profile as well as the Business Process Flow navigation.



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Better understand your Customer via LinkedIn

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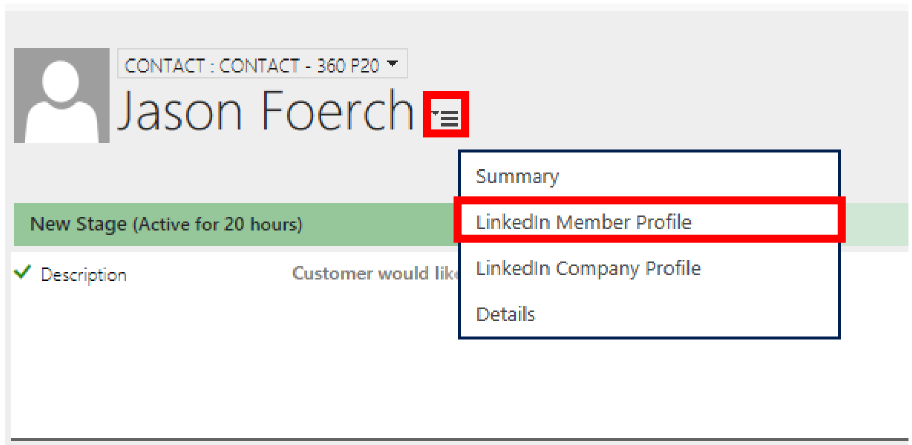
LinkedIn provides sellers with the ability to maintain strong relationship with their customers while still staying productive. It helps sellers gain insights into what has professionally changed with their customers / prospects as well as what is top of mind with customers. Additionally, should a seller be working to forge a

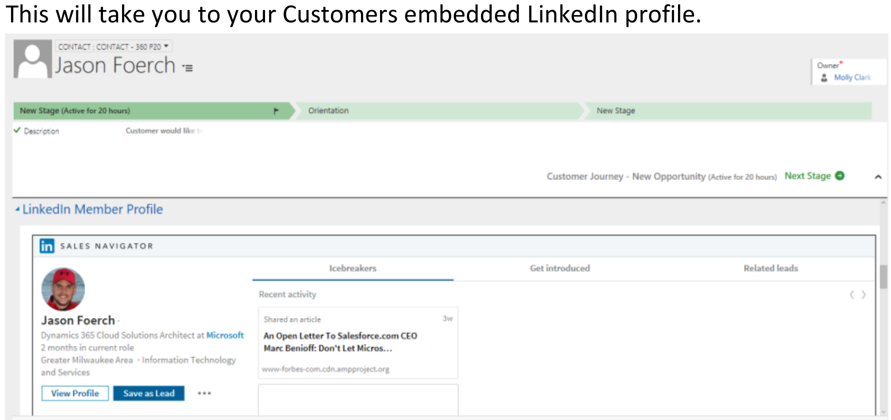
</td>
</tr>
</table>

relationship with a prospect, LinkedIn helps identify the common relationships that can be leveraged to bridge the gap. Let's take a look at how LinkedIn is utilized in Dynamics 365 to enable all of the above.

1. On your Customers contact record, select the LinkedIn Member Profile from the section selection drop down



2. This will take you to your Customers embedded LinkedIn profile.

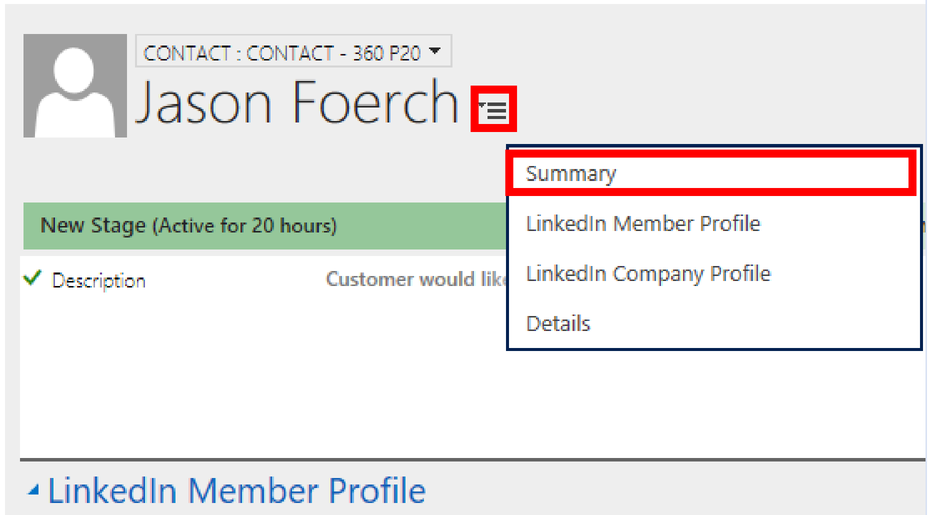


3. From here you can gain the following insights about your customer:
   A. What is top of mind and what have they been sharing?
   B. What connections that you have in common?
   C. Who are some recommended Leads that your customer could introduce you to?
4. Additionally, you also have access to the Company profile that is related to your customer.
5. Should you send In-Mail or track a specific LinkedIn individual within Sales Navigator, those records will automatically be synched to Dynamics 365 via the integration with LinkedIn.

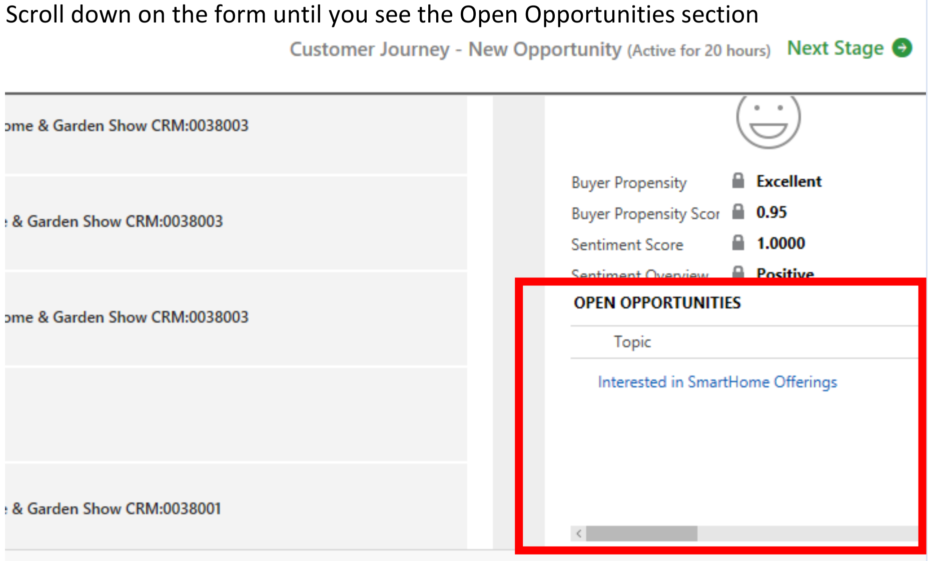
Send customer a proposal

Now that we have a better understanding of our customers propensity to buy our products, we need to see how this impacts the overall strength of our Opportunity. Should we be set to proceed with the Opportunity, we will need to generate a proposal and send that over to our customer. Let's take a look at how we can do this.

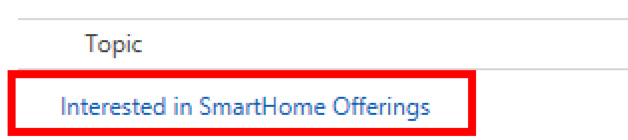
1. On the Contact form, select the "Summary" section from the section selection drop down



2. Scroll down on the form until you see the Open Opportunities section

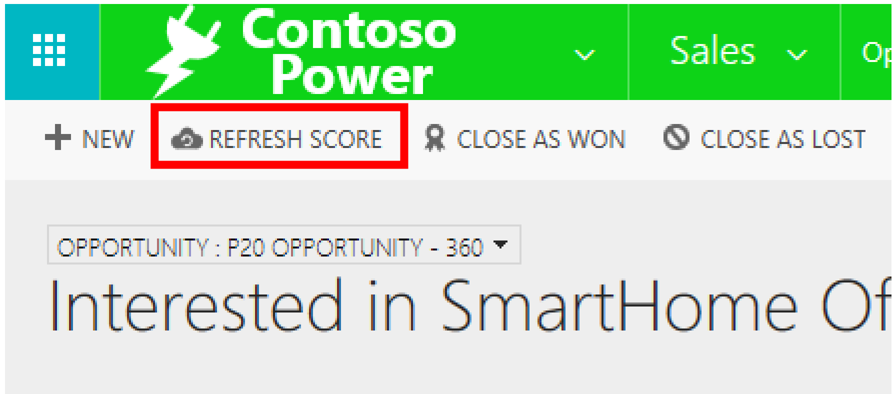


3. Click the Opportunity in the Sub Grid of Opportunities

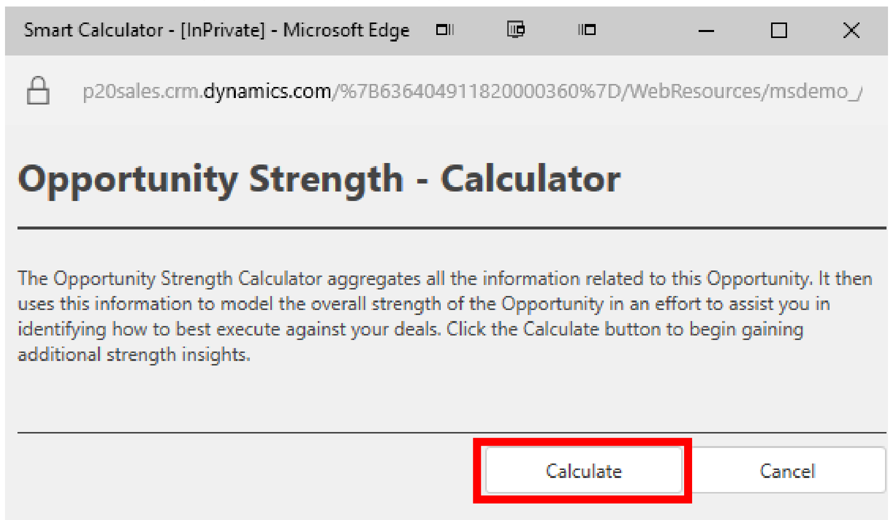


4. This will navigate you to the Opportunity that you were working with your customer on.

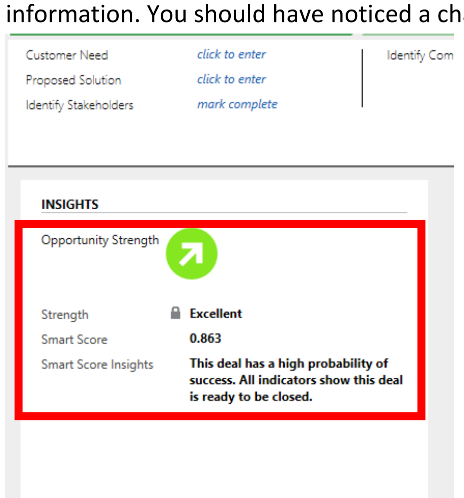
5. Click the Refresh Score button in the main command bar



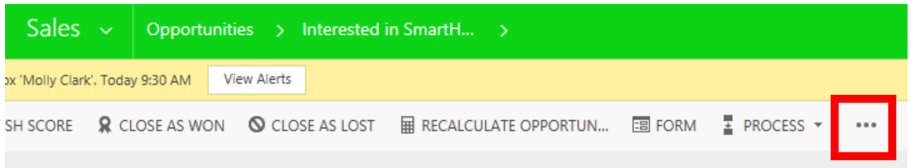
6. This will open the Opportunity Strength Calculator. Click the "Calculate" button to re-score the strength of this Opportunity



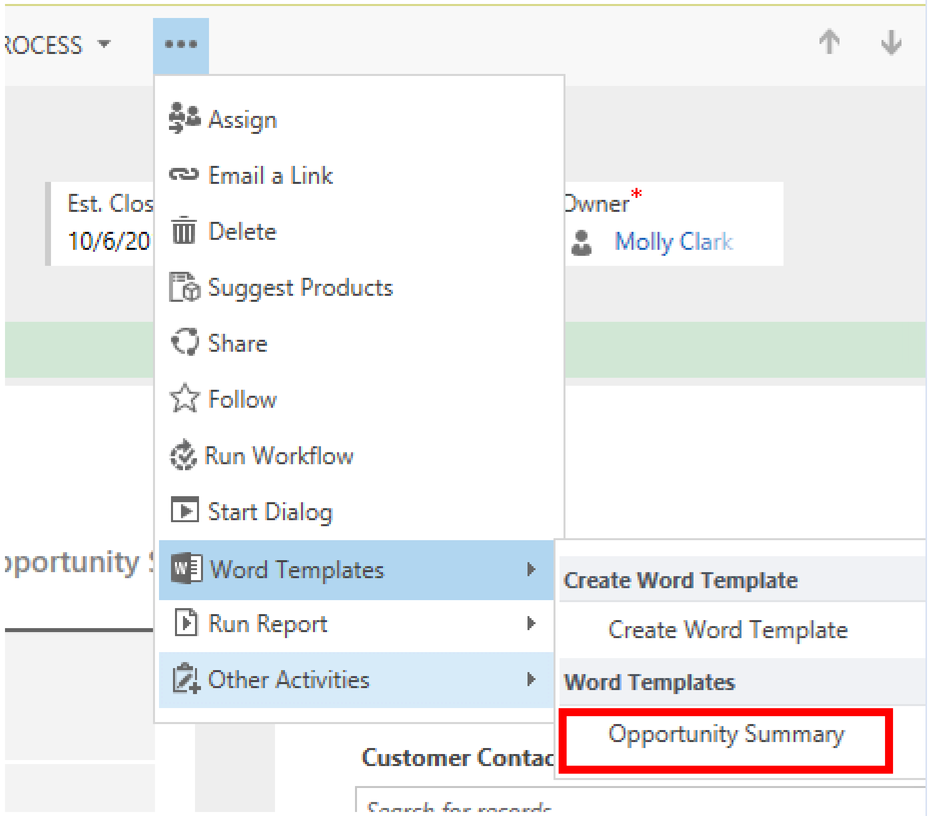
7. Once the calculator is finished, it will refresh your Opportunity with the updated information. Look at the strength now that we have our Buyer Propensity information. You should have noticed a change in the value.



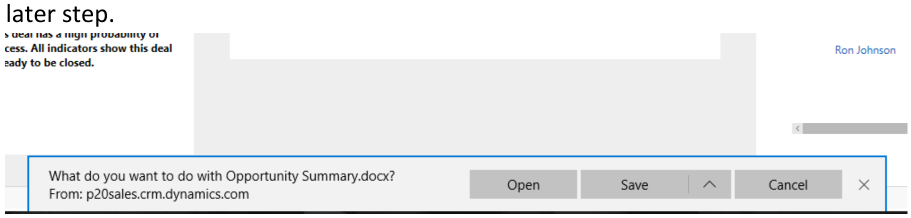
8. Now that our Opportunity has a high probability of success, the next step is for us to generate a proposal and send this to our customer for review.
9. From the Opportunity Command bar, click the ellipse button



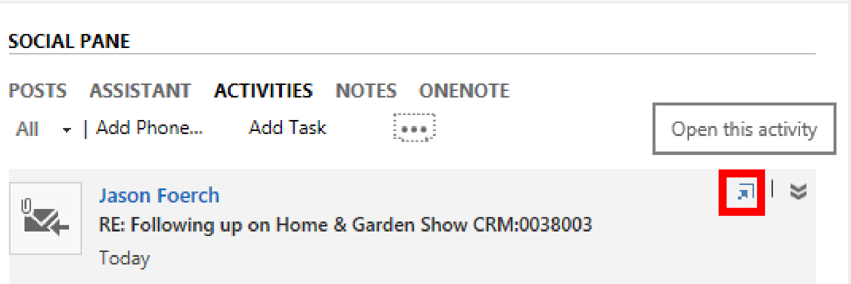
10. From the drop down, click Word Templates and select Opportunity Summary from the fly out



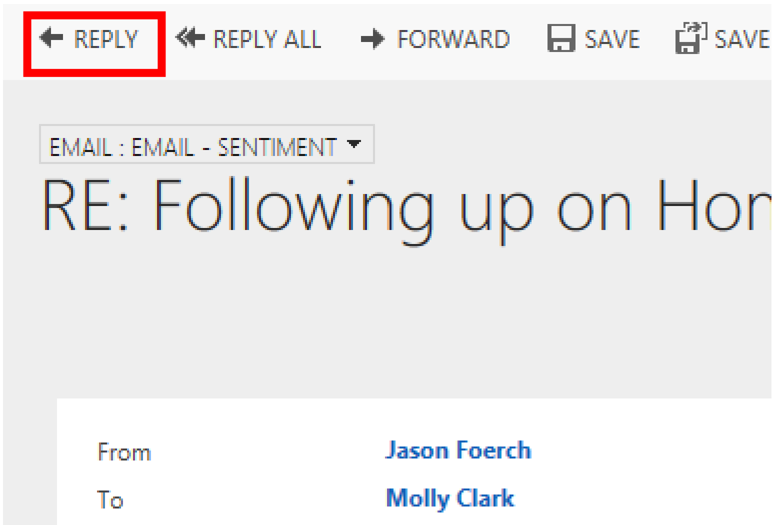
11. This will take the information from Dynamics 365 for this Opportunity and will generate a Word Document that you can then save to your machine. When prompted to save the document, save it to a place that you can reference in a later step.



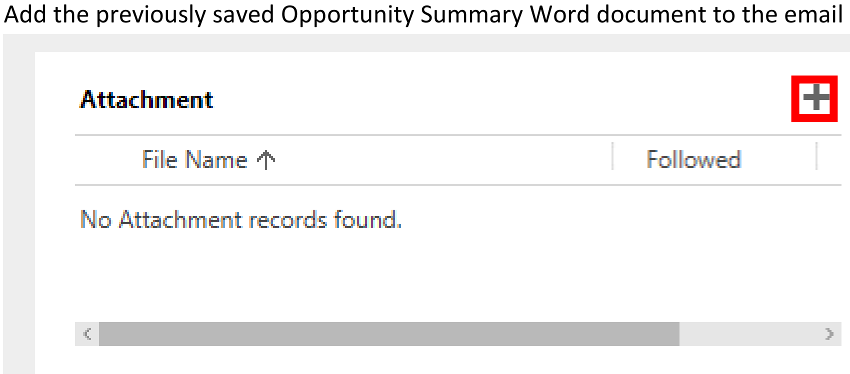
12. Open the last email that the customer sent you via the Social Pane

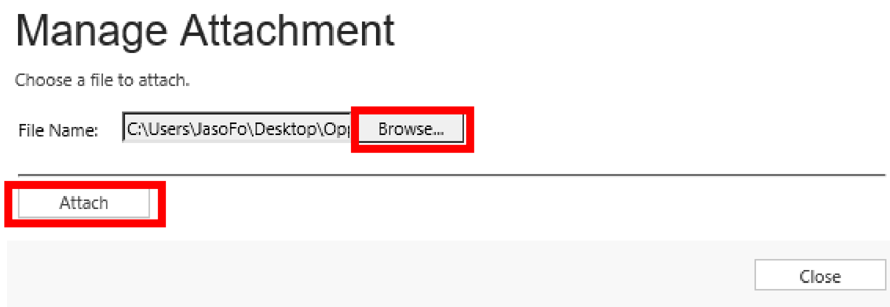


13. On the email, click the “Reply” button from the toolbar

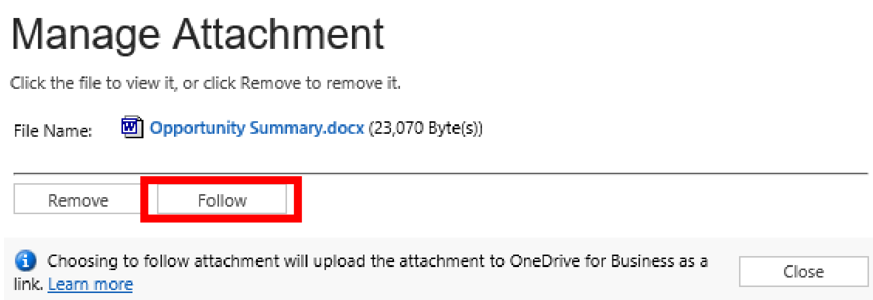


14. Enter a message in the body of the email
15. Add the previously saved Opportunity Summary Word document to the email





16. Once attached, click the “Follow” button. This will allow us to view when the customer has opened our proposal.



17. Click the close button to return to the main email window.
18. Click “Send” to send your email with the proposal to your customer

Key Learnings

In Exercise 3 the following concepts were covered:

1. How Dynamics 365 utilizes Outlook Add-ins to enable users to track emails directly from their mailbox.
2. How Dynamics 365 enables you to gain insights into the emails that you are sending to customers.
3. How Dynamics 365 enables organizations to implement consistent business processes via business process flows. Thus, enabling employees to be more efficient and focus on their relationships.

4. How Dynamics 365 can be used in conjunction with O365 Groups to drive cross team collaboration.
5. How Dynamics 365 can utilize OneNote to enable user to capture all of their notes in a central, dynamic, and easy to access location.
6. How Azure can be combined with the data inside Dynamics 365 to drive insights and allow users to take immediate action on the insights.
7. How LinkedIn can be utilized to manage and drive deeper customer relationships.
8. How Dynamics 365 can use Word to generate documents, and then send those documents out to customers.

Related Microsoft Technologies

Technology	**Used For**
Exchange Online	Sending emails
OneDrive for Business	Sharing / following documents outside of your organization
Outlook Mail	Email Tracking
Office 365 Groups	Cross Team Collaboration
OneNote	Central note taking
Azure ML	Buyer Propensity Opportunity Scoring Sentiment Analysis
Azure Cognitive Services	Sentiment Analysis
LinkedIn	Connection / Relationship Insights
Word	Document Generation

Exercise 4: Understanding your Business

Scenario

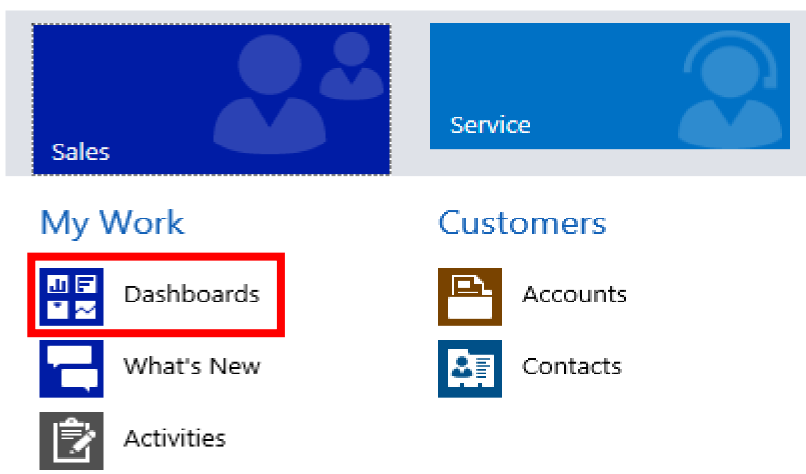
In the previous exercises we learned how to engage dynamically with our customers and gain real-time insights into these engagements. This extremely important as we execute at a transactional level. However, within business we also need to have a high-level understanding of how the business is progressing. This enables us to pivot and make the necessary changes which ultimately help ensure a company can stay relevant and viable.

In this scenario, you will learn how Dynamics 365 helps to provide insights to users via charts and dashboards. These insights can then be used by both the users and management to course correct as necessary.

<table>
<tr><th>Task</th><th>Detailed Steps</th></tr>
<tr><td>Dashboard Basics</td><td>

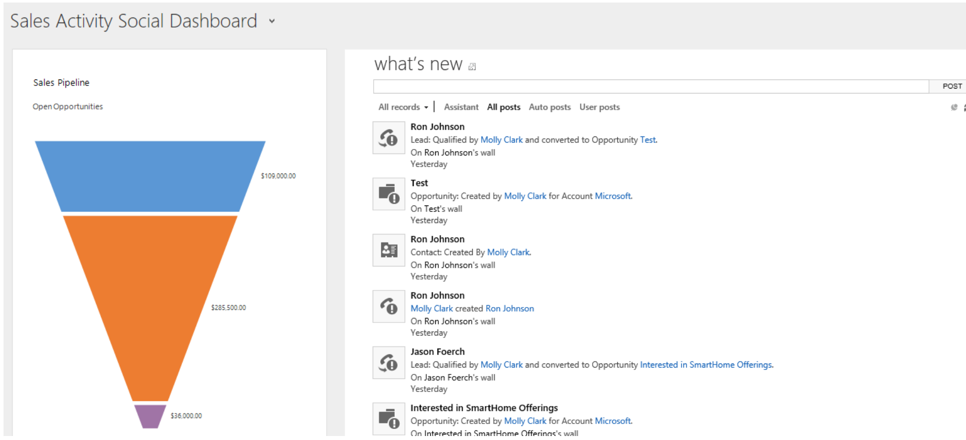
1. From the main application navigation select the Sales area

2. From the sub navigation select "Dashboards"

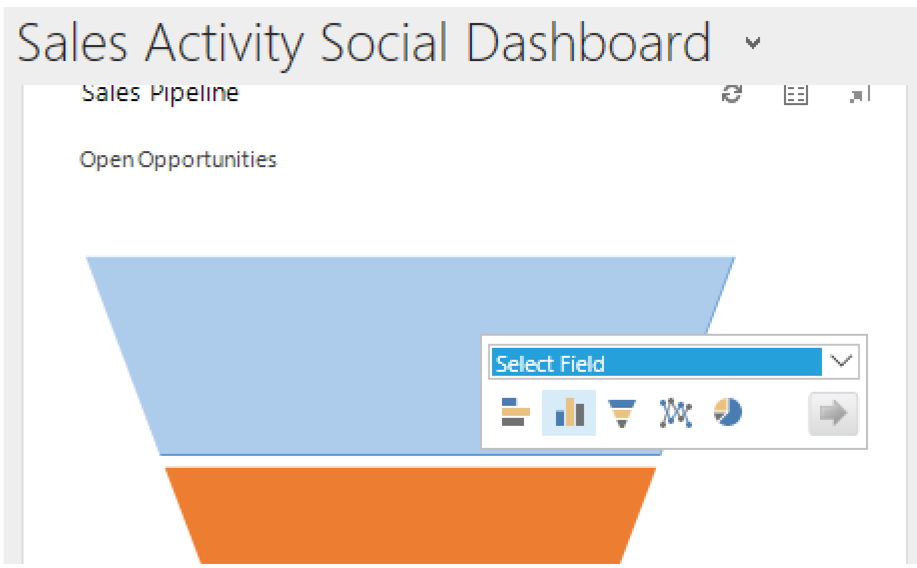


</td></tr>
</table>

3. This will take you to the default dashboard in Dynamics 365, "Sales Activity Social Dashboard"

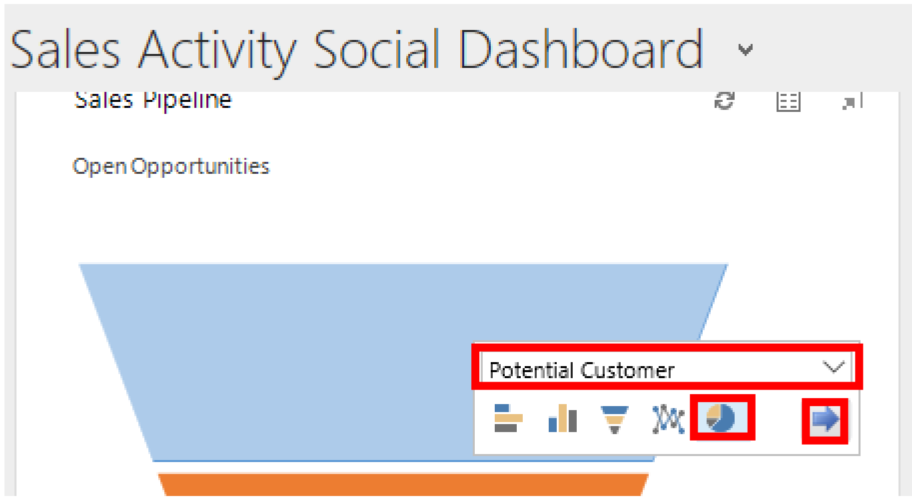


4. This is a native Dynamics 365 dashboard that contains only controls from Dynamics 365. These controls read data real-time from the Dynamics 365 database and thus have up to date information.
5. On the Sales Pipeline funnel, select the Qualify stage (blue)

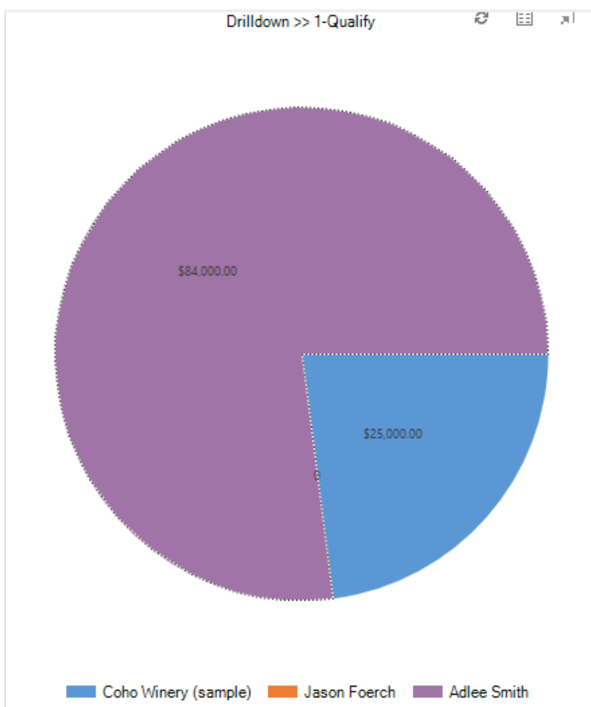


6. This will allow you to drill down into the data within that stage to gain additional insights. Select "Potential Customer" from the select field drop down.

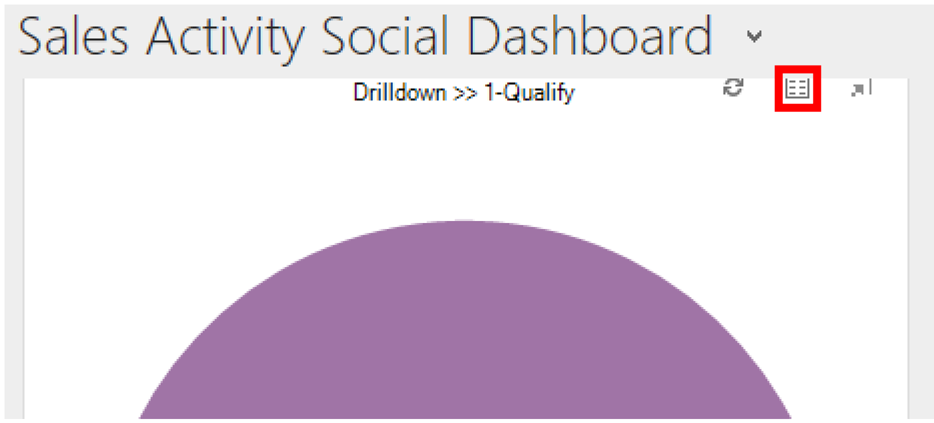
7. Click the pie chart icon, and select the go arrow to drill into all the Opportunities that are in the Qualify stage.



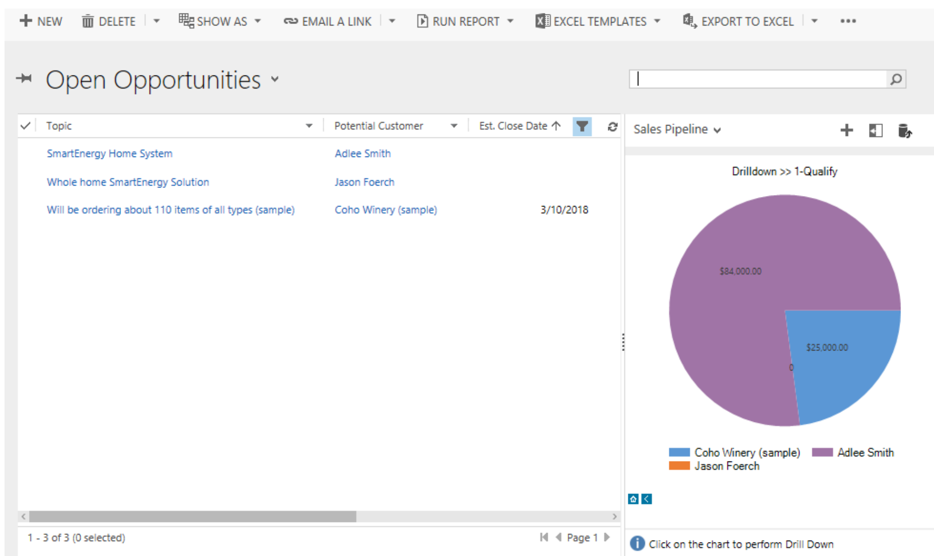
8. The chart will automatically update to display the filtered data set



9. Now if we want to see the actual records that make up this data set, we simply need to click the “Grid” icon when hovering over the chart



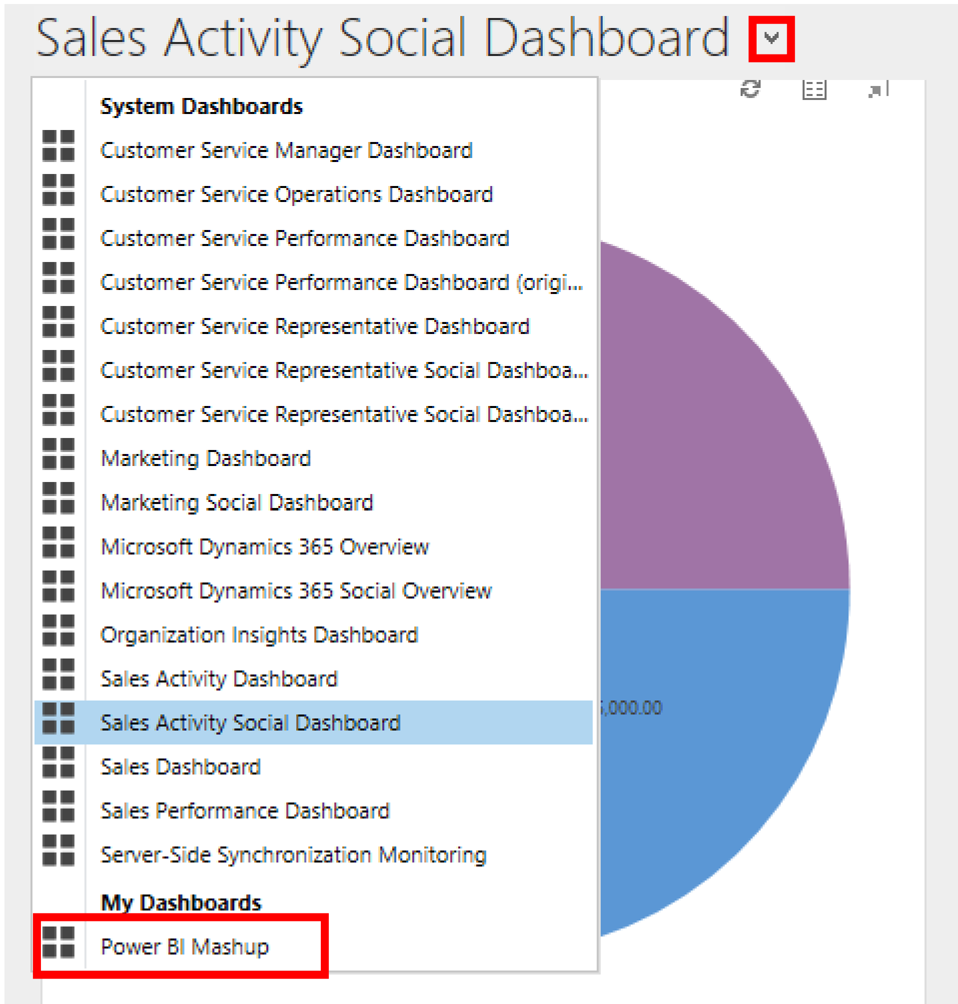
10. This will open a new window with the data and the chart displayed side by side. This enables the end user to take action against the data near real-time and see the affect that it has on the associated chart.



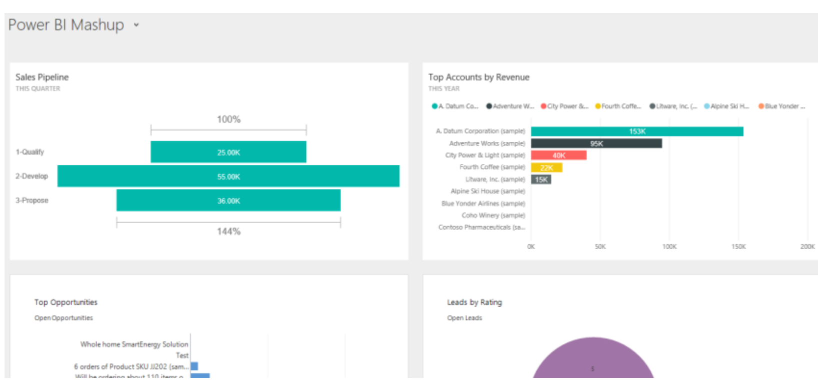
11. Close this window and return back to the main dashboard window

Analyze the Data with Power BI and Dynamics 365

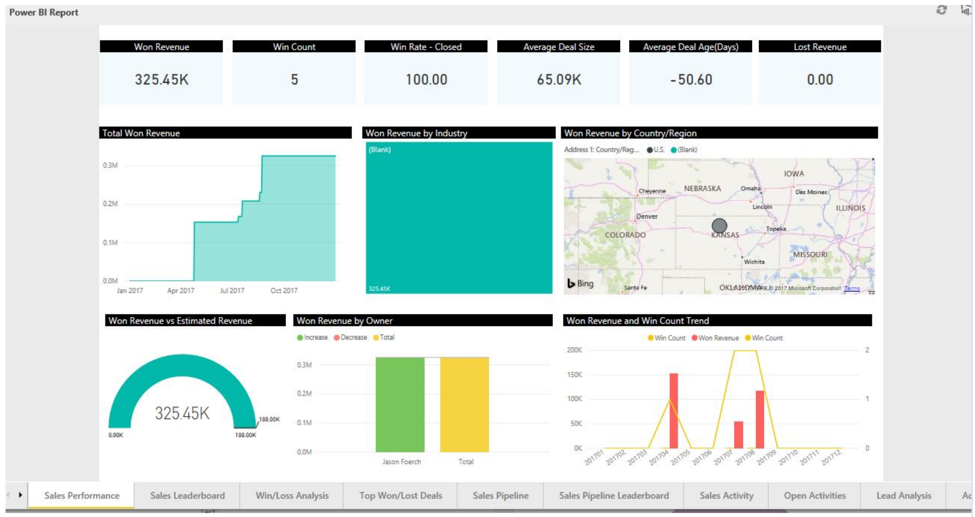
1. From the Dashboard selection drop down, select the Power BI Mashup dashboard



2. This will bring up a dashboard that contains both Dynamics controls as well as Power BI controls. The data in the Power BI controls is not real-time data, but also does not incur data transactions against the Dynamics 365 database. This allows the application to perform better.



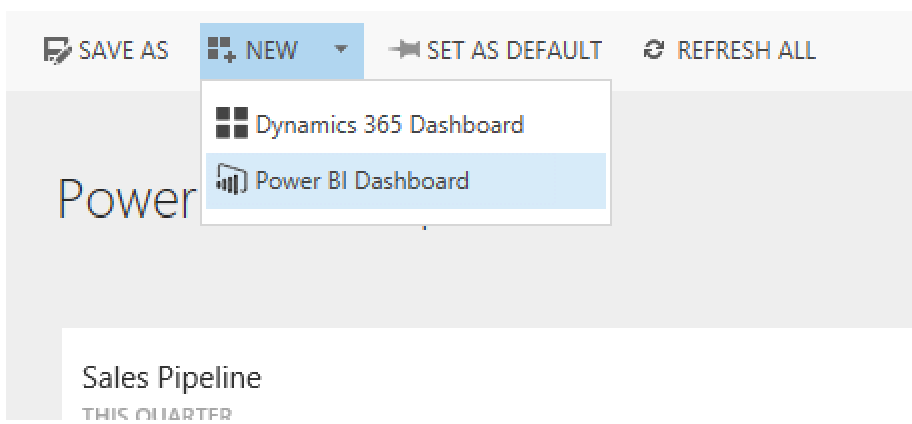
3. If you click on the Power BI charts, a dialog window will open that contains the Power BI report for that specific chart



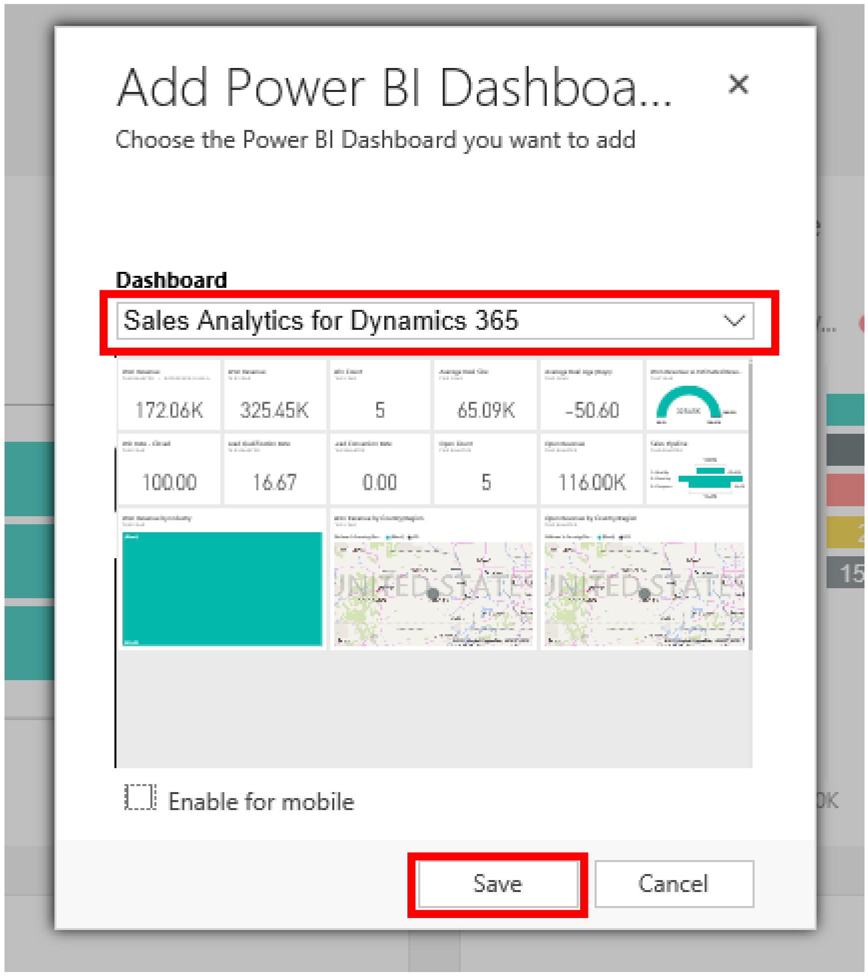
4. Close the dialog by hitting the contextual "X" in the upper right hand corner (being careful not to close the browser)

Create a Power BI Only Dynamics 365 Dashboard

1. From the dashboard command bar click the "New" drop down button and select Power BI Dashboard



2. In the Add Power BI Dashboard, select Sales Analytics for Dynamics 365 from the drop down and select “Save”



3. This will go ahead and create a new Dynamics 365 dashboard that is an embedded Power BI dashboard. This allows users to get the insights from Power BI directly within Dynamics 365.

Key Learnings

In Exercise 4 the following concepts were covered:

1. Dynamics 365 has its own Chart and Dashboard Controls that enable real-time analysis of the data inside Dynamics 365.
2. The Dynamics 365 Charts and Dashboards are interactive and allow additional filtering.
3. The Dynamics 365 Charts and Dashboards operate in real-time and thus cause performance overhead to the system, and thus should not be used for enterprise reporting needs.
4. Dynamics 365 embeds Power BI directly into its dashboard experience.
5. Power BI embedded in Dynamics 365 enables enterprise analytical capabilities that are contextual to Dynamics 365 (user does not have to leave the application).

Related Microsoft Technologies

Technology	Used For
Power BI	Enterprise Analytics