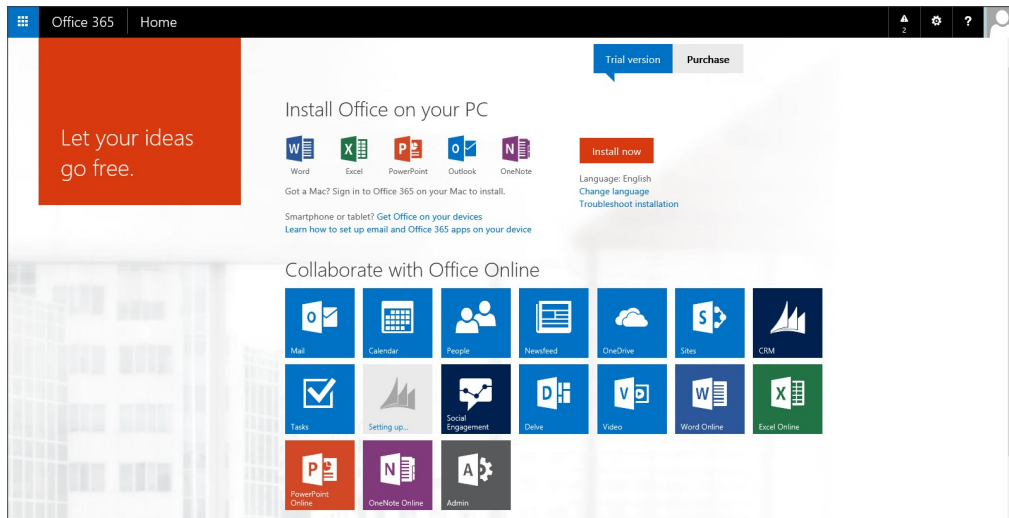


# Chapter 1



## Users

Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.



Microsoft Dynamics CRM | SALES | Dashboards | Create | Enter Search Item | Steve Hvie Dynshare

SAVES NEW EDIT DELETE SET AS DEFAULT SHARE DASHBOARD ASSIGN

### Sales Activity Dashboard

Sales Pipeline

Open Opportunities

Stage	Value
1-Quality	\$40,000.00
2-Develop	\$26,000.00
3-Propose	\$1,000.00

#### what's new

Enter post here POST

All records | Both Auto posts User posts

- Consulting Services**  
Opportunity: Created by Steve Hvie for Account Ram Lighting.  
On Consulting Services's wall  
4/20/2015 1:13 PM
- Consulting Services**  
Steve Hvie lost Opportunity for Account Ram Lighting.  
On Consulting Services's wall  
4/20/2015 1:13 PM
- User Licensing**  
Opportunity: Created by Steve Hvie for Account Redwood Waste.  
On User Licensing's wall  
4/20/2015 1:13 PM
- User Licensing**  
Steve Hvie lost Opportunity for Account Redwood Waste.  
On User Licensing's wall  
4/20/2015 1:13 PM
- Consulting Services**  
Opportunity: Created by Steve Hvie for Account 1234 Power.  
On Consulting Services's wall  
4/20/2015 1:13 PM
- User Licensing**  
Opportunity: Created by Steve Hvie for Account Windward Promotions.  
On User Licensing's wall  
4/20/2015 1:13 PM
- User Licensing**  
Opportunity: Created by Steve Hvie for Account Atlanta Towers.

Edit

0 followers

Start following colleagues and records, and let people follow you.  
[Learn more](#)



### Upload Data File Help

Select a data file to import into Microsoft Dynamics CRM.

Data file name:

Supported file types: XML Spreadsheet 2003 (.xml), .csv, .txt, and .zip

### Developer Resources

View information or download files that help you develop applications and extensions for Microsoft Dynamics CRM.

Microsoft Dynamics CRM | SETTINGS | Customizations

## Developer Resources

**Your Organization Information:**

**Organization Unique Name**  
org9158360e

**Windows Azure Service Bus Issuer Certificate**  
Issuer Name: crm.dynamics.com  
[Download Certificate](#)

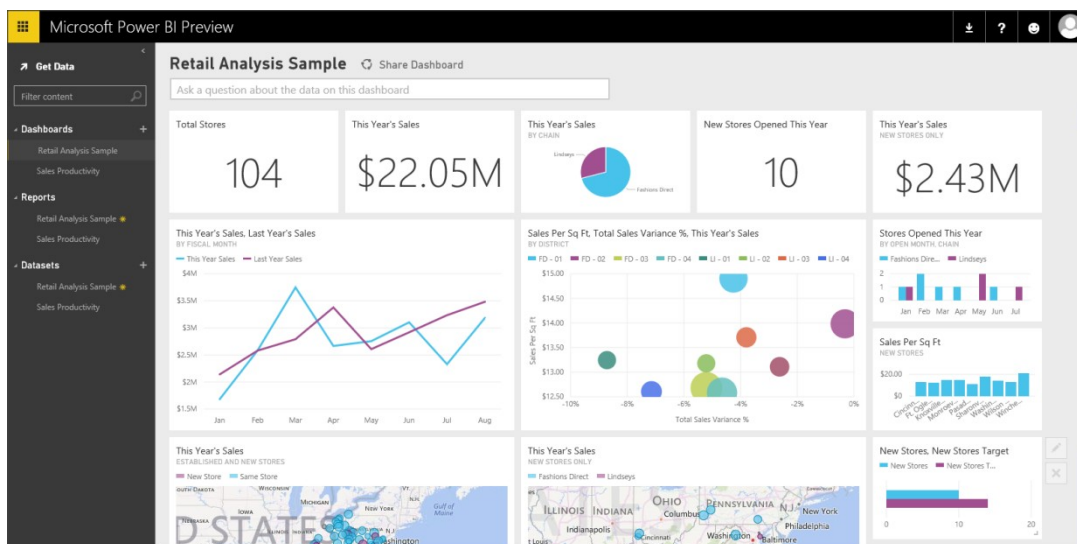
**Developer Center**  
[Download documentation, tools and sample code](#)

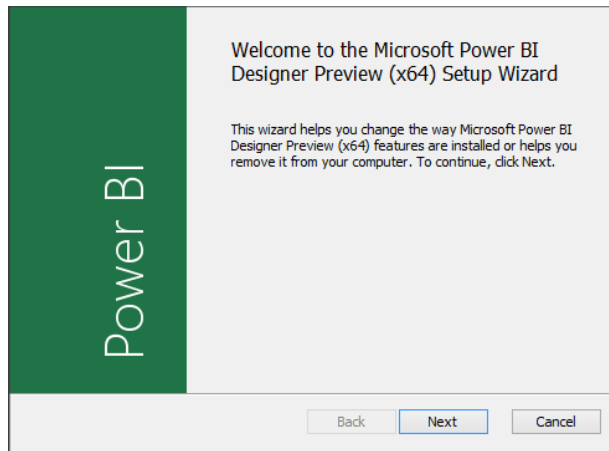
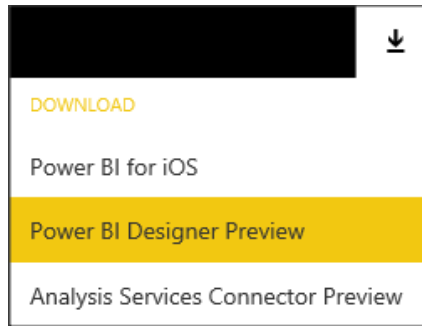
**Service Endpoints:**

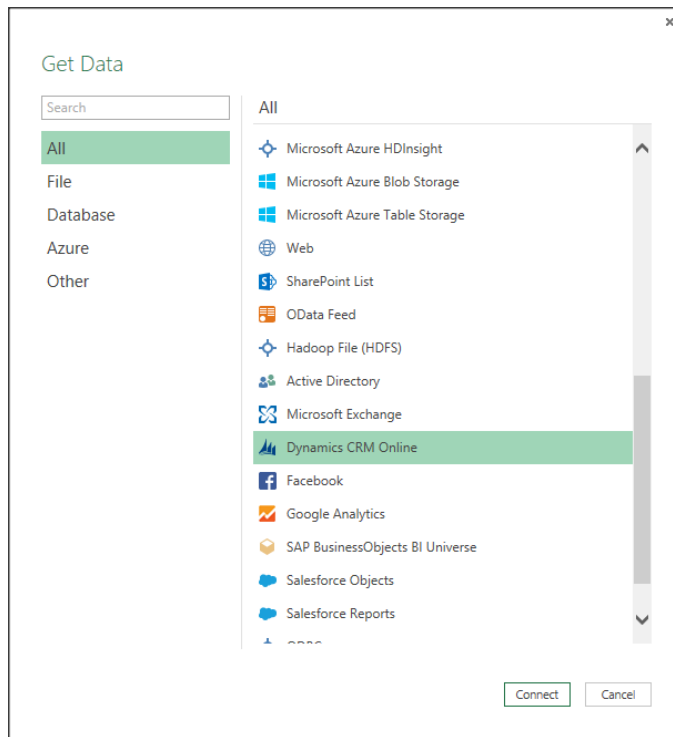
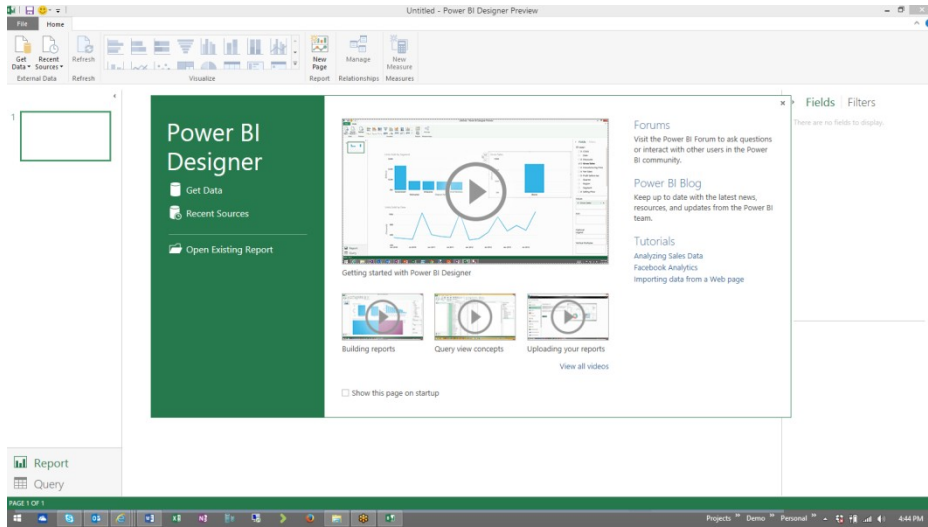
**Discovery Service**  
Protocol: SOAP  
<https://disco.crm.dynamics.com/XRMServices/2011/Discovery.svc>  
[Download WSDL](#)

**Organization Service**  
Protocol: SOAP  
<https://dynsharebi.api.crm.dynamics.com/XRMServices/2011/Organization.svc>  
[Download WSDL](#)

**Organization Data Service**  
Protocol: OData (REST)  
<https://dynsharebi.crm.dynamics.com/XRMServices/2011/OrganizationData.svc/>  
[Download CSDL](#)








Microsoft Dynamics CRM Online


Enter the URL for the Dynamics CRM OData service.

URL (e.g.: <https://<tenant>.crm.dynamics.com/XRMServices/2011/OrganizationData.svc>)

OK Cancel

Access an OData feed

 <https://dynsharebi.crm.dynamics.com/>

 The credentials provided are invalid.

You are already signed in.

Connect Cancel

Navigator

Show All | Show Selected [4]

- https://dynsharebi.crm.dynamics.com/XRMServi...
  - AccountSet
  - LeadSet
  - OpportunitySet
  - SystemUserSet**

SystemUserSet

QueueId	CreatedBy	PreferredAddressCode	NickName	StageId	IsEmailAc
Record	Record	Record		null	null

The data in the preview has been truncated due to size limits. Reducing the number of columns or filtering may load more data.

Load Edit Cancel

4 queries

- Leads
- Users
- Accounts
- Opportunities

Source: [Name="LeadSet"] [Data]

ID	Address1_Name	Subject	Address1_Country	Address1_Line1	Address1_Telephone2	LastName	Description	Address1_City	Address1_Telephone1	UTCConversionTi
1	null	Consulting Services	null	null	null	Masouras	null	null	null	null
2	null	Consulting Services	null	null	null	Rodin	null	null	null	null
3	null	Subscriptions	null	null	null	Ross	null	null	null	null
4	null	Subscriptions	null	null	null	Whitson	null	null	null	null
5	null	Support Contract	null	null	null	Johnson	null	null	null	null
6	null	User Licensing	null	null	null	Keith	null	null	null	null
7	null	Support Contract	null	null	null	Nopen	null	null	null	null
8	null	Subscriptions	null	null	null	Zhou	null	null	null	null
9	null	Support Contract	null	null	null	Hadley	null	null	null	null
10	null	Support Contract	null	null	null	Talbot	null	null	null	null
11	null	Consulting Services	null	null	null	Nelson	null	null	null	null
12	null	Subscriptions	null	null	null	Penny	null	null	null	null
13	null	User Licensing	null	null	null	Thompson	null	null	null	null
14	null	Consulting Services	null	null	null	Toms	null	null	null	null
15	null	Subscriptions	null	null	null	Williams	null	null	null	null

The data in the preview has been truncated due to size limits. Reducing the number of columns or filtering may load more data.

Report Query

198 COLUMNS, 32 ROWS

PREVIEW DOWNLOADED ON THURSDAY, APRIL 30, 2015

The screenshot shows a query editor window with a list of tables on the left and a 'Query Settings' panel on the right. The table list includes various entities like 'ImportLeadSet', 'ImportMapSet', 'IncidentResolutionSet', etc. The 'Query Settings' panel shows 'Name' as 'Leads' and 'APPLIED STEPS' as 'Source' and 'Navigation'.

Name	data	Signature
80	ImportLeadSet	Table table
81	ImportMapSet	Table table
82	ImportSet	Table table
83	IncidentResolutionSet	Table table
84	IncidentSet	Table table
85	InvalidDependencySet	Table table
86	InvoiceDetailSet	Table table
87	InvoiceSet	Table table
88	IsuConfigSet	Table table
89	KbArticleCommentSet	Table table
90	KbArticleSet	Table table
91	KbArticleTemplateSet	Table table
92	LeadAddressSet	Table table
93	LeadCompetitorSet	Table table
94	LeadProductSet	Table table
95	LeadSet	Table table
96	LetterSet	Table table
97	LicenseSet	Table table
98	ListMemberSet	Table table
99	ListSet	Table table
100	LookupMappingSet	Table table
101	MailboxSet	Table table
102	MailMergeTemplateSet	Table table
103	MessageSet	Table table
	LeadSet	

## Chapter 2

The screenshot shows an 'Options' dialog box with a sidebar on the left and a main content area on the right. The sidebar has 'Data Load' selected under 'CURRENT FILE'. The main content area shows 'Locale' set to 'English (United States)' and two checked options under 'Relationships': 'Import relationships from data sources' and 'Autodetect new relationships after data is loaded'.

**Options**

**GLOBAL**

- Data Load
- Security
- Updates
- Usage Data
- Diagnostics

**CURRENT FILE**

- Data Load**
- Privacy

**Locale**

English (United States)

**Relationships**

- Import relationships from data sources
- Autodetect new relationships after data is loaded

OK Cancel



### Query Settings

✕

▾ **PROPERTIES**

Name

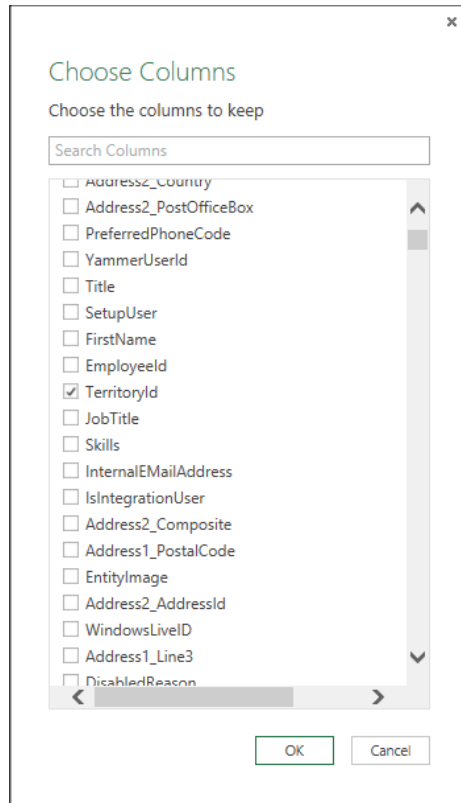
UserSet

All Properties

▾ **APPLIED STEPS**

Source	✖
Navigation	✖
Expand TerritoryId	✖
Expand BusinessUnitId	✖
Removed Other Columns	✖
Filtered Rows	✖

Choose Columns Remove Columns ▾ Manage Columns	Keep Rows ▾ Remove Rows ▾ Reduce Rows	Remove Duplicates Remove Errors ▾	Sort	Split Column ▾ Group By	Data Type: Text ▾ Use First Row As Headers ▾ Replace Values	Merge Queries Append Queries Combine Binaries Combine
--	---	--------------------------------------	------	----------------------------	---	--



	TerritoryId.Name	BusinessUnitId.Name	SystemUserId
1	Northeast	Dynamics AX	88dc6ce9-9fbb-e411-80ea-c4346bac094c
2	Midwest	Dynamics AX	42a01163-a0bb-e411-80ea-c4346bac094c
3	Southeast	Dynamics CRM	bbd99d15-a0bb-e411-80e8-c4346bac3acc
4	Midwest	Dynamics GP	ee19e680-a0bb-e411-80e8-c4346bac3acc
5	Northeast	Dynamics AX	f819e680-a0bb-e411-80e8-c4346bac3acc
6	Northeast	Dynamics GP	64b28425-a0bb-e411-80ea-c4346bad3674
7	Southeast	Office 365	08c9ce90-a0bb-e411-80ea-c4346bad3674
8	Southeast	Dynamics GP	de3aafa2-a0bb-e411-80ea-c4346bad3674
9	West Coast	Dynamics AX	001773c6-a0bb-e411-80ea-c4346bad3674
10	Northeast	Dynamics CRM	d9ffe6cd-a5bb-e411-80ea-c4346bad3674

	LeadSourceCode.Value	LeadId
1	Trade Show	07df8303-19e7-e411-80f4-c4346bac3acc
2	Web	09df8303-19e7-e411-80f4-c4346bac3acc
3	Web	0bdf8303-19e7-e411-80f4-c4346bac3acc
4	Advertisement	0ddf8303-19e7-e411-80f4-c4346bac3acc
5	Employee Referral	0fdf8303-19e7-e411-80f4-c4346bac3acc
6	Web	11df8303-19e7-e411-80f4-c4346bac3acc
7	Trade Show	13df8303-19e7-e411-80f4-c4346bac3acc
8	Web	15df8303-19e7-e411-80f4-c4346bac3acc
9	Employee Referral	17df8303-19e7-e411-80f4-c4346bac3acc
10	Advertisement	19df8303-19e7-e411-80f4-c4346bac3acc
11	Web	1bdf8303-19e7-e411-80f4-c4346bac3acc
12	Trade Show	1ddf8303-19e7-e411-80f4-c4346bac3acc
13	Web	1fdf8303-19e7-e411-80f4-c4346bac3acc
14	Trade Show	21df8303-19e7-e411-80f4-c4346bac3acc

	ActualValue	OwnerId.Id	OwnerId.Name	SalesStage	ActualCloseDate	EstimatedCloseDate	CustomerId
1	Record	64b28425-a0bb-e411-80ea-c4346bad3674	Bill Smith	Record	3/9/2015 4:00:00 AM	2/17/2015 5:00:00 AM	Record
2	Record	d9ffe6cd-a5bb-e411-80ea-c4346bad3674	Steve Thompson	Record	2/16/2015 5:00:00 AM	1/27/2015 5:00:00 AM	Record
3	Record	88dc6ce9-9fbb-e411-80ea-c4346bac094c	Dave Green	Record	5/3/2014 4:00:00 AM	4/13/2014 4:00:00 AM	Record
4	Record	64b28425-a0bb-e411-80ea-c4346bad3674	Bill Smith	Record	8/26/2014 4:00:00 AM	8/6/2014 4:00:00 AM	Record
5	Record	64b28425-a0bb-e411-80ea-c4346bad3674	Bill Smith	Record	8/2/2014 4:00:00 AM	7/13/2014 4:00:00 AM	Record
6	Record	001773c6-a0bb-e411-80ea-c4346bad3674	Corey Preston	Record	3/9/2015 4:00:00 AM	2/17/2015 5:00:00 AM	Record
7	Record	ee19e680-a0bb-e411-80e8-c4346bac3acc	Barabra Watson	Record	3/16/2015 4:00:00 AM	2/24/2015 5:00:00 AM	Record
8	Record	de3aafa2-a0bb-e411-80ea-c4346bad3674	Tiffany Jones	Record	11/7/2014 5:00:00 AM	10/18/2014 4:00:00 AM	Record
9	Record	88dc6ce9-9fbb-e411-80ea-c4346bac094c	Dave Green	Record	3/16/2015 4:00:00 AM	2/24/2015 5:00:00 AM	Record

	Address1_StateOrProvince	AccountNumber	AccountId	Address1_City
1	IL	ADAMPARK0001	c98bb1d1-2de7-e411-80f4-c4346bac3acc	Indianapolis
2	NE	ASSOCIAT0001	cb8bb1d1-2de7-e411-80f4-c4346bac3acc	Lincoln
3	KS	BLUEYOND0001	cd8bb1d1-2de7-e411-80f4-c4346bac3acc	Wichita
4	IL	CENTRALI0001	cf8bb1d1-2de7-e411-80f4-c4346bac3acc	Peoria
5	IL	COHOWINE0001	d18bb1d1-2de7-e411-80f4-c4346bac3acc	Springfield
6	WI	COMPUTES0001	d38bb1d1-2de7-e411-80f4-c4346bac3acc	Greenbay
7	GA	CONTINEN0001	d58bb1d1-2de7-e411-80f4-c4346bac3acc	Atlanta
8	CA	CONTRYV0001	d78bb1d1-2de7-e411-80f4-c4346bac3acc	San Diego
9	IL	DOWNTOWN001	d98bb1d1-2de7-e411-80f4-c4346bac3acc	Chicago
10	CO		db8bb1d1-2de7-e411-80f4-c4346bac3acc	Denver
11	NE	FOURTHCO0001	dd8bb1d1-2de7-e411-80f4-c4346bac3acc	Beatrice
12	CA	LAWRENCE0001	df8bb1d1-2de7-e411-80f4-c4346bac3acc	San Diego



SequenceNum... ModifiedOnBehalfBy OriginatingLeadId

Search Columns to Expand

- (Select All Columns)
- Id
- LogicalName
- Name

Use original column name as prefix

OK Cancel

PresentProposal ResolveFeedback OwnerId

Search Columns to Expand

- (Select All Columns)
- Id
- LogicalName
- Name

Use original column name as prefix

OK Cancel

Sort Ascending  
Sort Descending  
Clear Sort  
Clear Filter  
**Text Filters**  
  
 (Select All)  
 Dynamics AX  
 Dynamics CRM  
 Dynamics GP  
 Office 365  
OK Cancel

**BusinessUnitId.Name**  
 Equals...  
 Does Not Equal...  
 Begins With...  
 Does Not Begin With...  
 Ends With...  
 Does Not End With...  
 Contains...  
**Does Not Contain...**




TerritoryId.Name	BusinessUnitId.Name	SystemUserId
		88dc6ce9-9fbb-e411-80ea-c4346bac094c
		42a01163-a0bb-e411-80ea-c4346bac094c
		bbd99d15-a0bb-e411-80e8-c4346bac3acc
		ee19e680-a0bb-e411-80e8-c4346bac3acc
		f819e680-a0bb-e411-80e8-c4346bac3acc
		ad3674
		ad3674
		ad3674
		ad3674
		ad3674

Filter Rows

Show rows where: BusinessUnitId.Name

And  Or  
   
OK Cancel

	TerritoryId.Name	BusinessUnitId.Name	SystemUserId
1	Northeast	Dynamics AX	88dc6ce9-9fbb-e411-80ea-c4346bac094c
2	Midwest	Dynamics AX	42a01163-a0bb-e411-80ea-c4346bac094c
3	Southeast	Dynamics CRM	bbd99d15-a0bb-e411-80e8-c4346bac3acc
4	Midwest	Dynamics GP	ee19e680-a0bb-e411-80e8-c4346bac3acc
5	Northeast	Dynamics AX	f819e680-a0bb-e411-80e8-c4346bac3acc
6	Northeast	Dynamics GP	64b28425-a0bb-e411-80ea-c4346bad3674
7	Southeast	Office 365	08c9ce90-a0bb-e411-80ea-c4346bad3674
8	Southeast	Dynamics GP	de3aafa2-a0bb-e411-80ea-c4346bad3674
9	West Coast	Dynamics AX	001773c6-a0bb-e411-80ea-c4346bad3674
10	Northeast	Dynamics CRM	d9ffe6cd-a5bb-e411-80ea-c4346bad3674

 Merge Queries  
 Append Queries  
 Combine Binaries  
 Combine

LeadSet

### Merge


Select a table and matching columns to create a merged table.

	ImportSequenceNumber	OriginatingLeadId.Id	StepId	DiscountPe
221a-4260-90b2-2a95ed51a5bc	<i>null</i>	dc73189b-6e05-e511-80f7-c4346bac7be8	<i>null</i>	
<i>null</i>	18	09df8303-19e7-e411-80f4-c4346bac3acc	<i>null</i>	
<i>null</i>	18	0fdf8303-19e7-e411-80f4-c4346bac3acc	<i>null</i>	
<i>null</i>	18	11df8303-19e7-e411-80f4-c4346bac3acc	<i>null</i>	
<i>null</i>	18	13df8303-19e7-e411-80f4-c4346bac3acc	<i>null</i>	

LeadSet

LeadSourceCode.Value	LeadId
Trade Show	07df8303-19e7-e411-80f4-c4346bac3acc
Web	09df8303-19e7-e411-80f4-c4346bac3acc
Web	0bdf8303-19e7-e411-80f4-c4346bac3acc
Advertisement	0ddf8303-19e7-e411-80f4-c4346bac3acc
Employee Referral	0fdf8303-19e7-e411-80f4-c4346bac3acc

Only include matching rows

 The selection has matched 20 out of the first 22 rows.

OK Cancel

Search Columns to Expand

Expand  Aggregate

(Select All Columns)  
 LeadSourceCode.Value  
 LeadId

Use original column name as prefix

OK Cancel

Name	SalesStage.Value	ActualCloseDate
	3	3/9/20
	3	8/26/20
	3	8/2/20
	3	5/3/20
	3	3/16/20
mpson	3	2/16/20
mpson	2	
atson	3	3/16/20
ton	3	3/9/20
	0	
es	3	11/7/20
	1	

SalesStage.Value	ActualCloseDate
3	3/9/2015 4:00:00 AM
3	
3	
3	
3	
3	2/16/2015 5:00:00 AM

Context menu options:

- Text Filters
- Replace Values...
- Drill Down
- Add as New Query



Replace Values

Replace one value with another in the selected columns.

Value To Find

Replace With

Match entire cell contents

OK Cancel

SalesStage.Value
Close
Close
Close
Close
Close
Close
Propose
Close
Close
Qualify

Data Type: Decimal Number

Amount	Estimated Amount
94800.82	95000
22469.39	22000
300	300
34000	34000
19000	15000
150000	150000
null	10800
34000	30000

Data Type: Date/Time

Close Date	Estimated Close Date
3/9/2015 4:00:00 AM	2/17/2015 5:00:00 AM
2/16/2015 5:00:00 AM	1/27/2015 5:00:00 AM
null	4/20/2015 4:00:00 AM
5/3/2014 4:00:00 AM	4/13/2014 4:00:00 AM
8/26/2014 4:00:00 AM	8/6/2014 4:00:00 AM
null	12/10/2014 5:00:00 AM
8/2/2014 4:00:00 AM	7/13/2014 4:00:00 AM
3/9/2015 4:00:00 AM	2/17/2015 5:00:00 AM

Query Properties





Name  
Opportunities

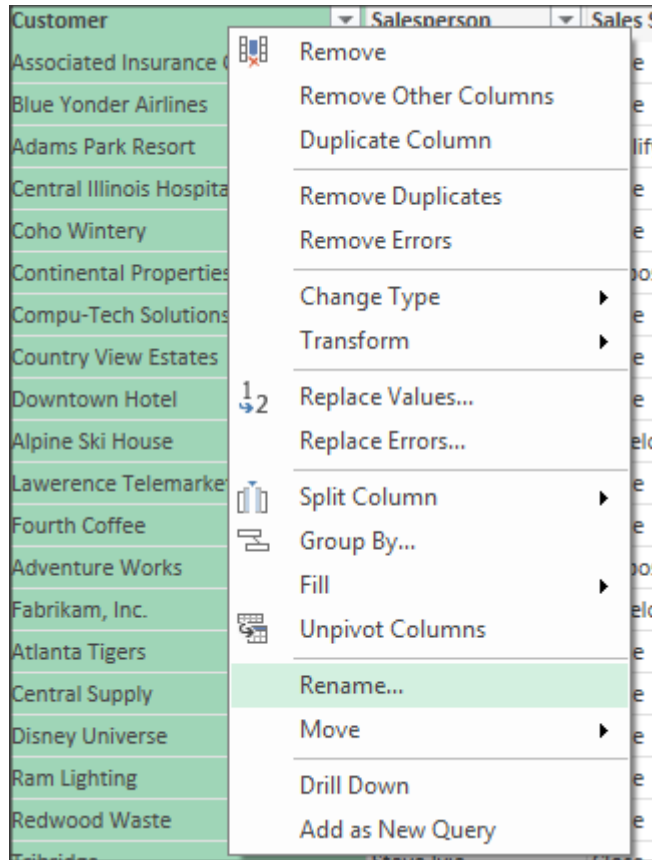
Description

Enable load to report

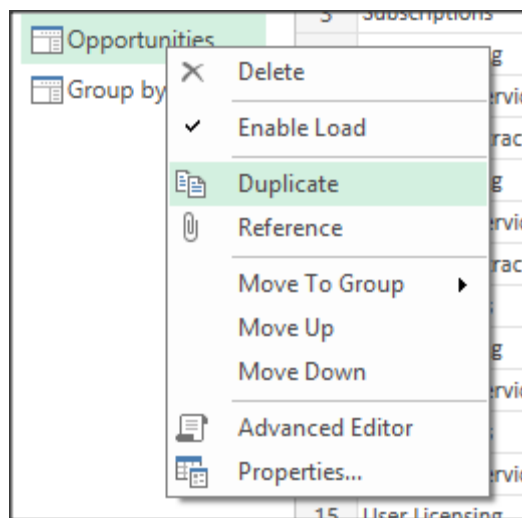
Enable refresh of this query

OK Cancel

-  Opportunities
-  Leads
-  Users
-  Accounts



## Chapter 3



File Home Transform Add Column View

Group By Use First Row As Headers Count Rows

Transpose Reverse Rows

Data Type: Text Fill Rename

Replace Values Pivot Column Move

Replace Errors Unpivot Columns

Table Any Column

**Group By**

Group rows in this table based on the values in the currently selected columns.

- Users
- Accounts
- Opportunities
- Group by Territory and Product**

`= Table.ReorderColumns("#Filter`

	Name	Customer
1	Consulting Services	Associated Insurance Co
2	Support Contract	Coho Wintery
3	Subscriptions	Compu-Tech Solutions
4	User Licensing	Central Illinois Hospital
5	Consulting Services	Lawrence Telemarketin

Group By

Specify the columns to group by.

Group by +

- Name -
- Territory -
- Status -

New column name Operation Column +

- Total Amount Sum Actual Amount -

OK Cancel

	Name	Territory	Status	Total Amount
1	Consulting Services	Northeast	Won	113800.82
2	Support Contract	Northeast	Won	172469.39
3	Subscriptions	Northeast	Won	300
4	User Licensing	Northeast	Won	34000
5	User Licensing	Northeast	Open	null
6	Consulting Services	Midwest	Won	34000
7	Support Contract	West Coast	Won	29000
8	Subscriptions	Southeast	Open	null
9	User Licensing	Southeast	Won	44000
10	Consulting Services	Midwest	Open	null
11	Consulting Services	Southeast	Open	null
12	User Licensing	Midwest	Lost	0
13	Consulting Services	Northeast	Lost	0
14	User Licensing	Northeast	Lost	0

Transform Add Column View

Transpose   
  Reverse Rows   
  Count Rows   
 Data Type: Text   
  Replace Values   
  Replace Errors   
  Fill   
  Pivot Column   
  Unpivot Columns   
  Rename   
  Move   
  Split Column   
  Format   
  Merge Columns   
  Length   
  Parse   
 Statistics   
 Standard   
 Scientific   
 10<sup>2</sup>

Any Column    Text Column    Number Column

**Pivot Column**  
 Use names in the currently selected column to create new columns. Tables with nested columns are not supported.

	Estimated Amount	Actual Amount	Estimated Close Date	Actual Close Date	Sales Stage	Status	
	95000		2/17/2015	3/9/2015	Closed	Won	
	22000	22469.39	7/23/2014	8/6/2014	8/26/2014	Closed	Won
	300	300	6/29/2014	7/13/2014	8/2/2014	Closed	Won
	34000	34000	3/30/2014	4/13/2014	5/3/2014	Closed	Won
Category and Product	15000	19000	2/10/2015	2/24/2015	3/16/2015	Closed	Won
Stage	150000	150000	1/13/2015	1/27/2015	2/16/2015	Closed	Won
for Open Sales	10800	null	4/19/2015	5/3/2015	null	Propose	Open
	30000	34000	2/10/2015	2/24/2015	3/16/2015	Closed	Won
	25000	29000	2/3/2015	2/17/2015	3/9/2015	Closed	Won
	40000	null	4/6/2015	4/20/2015	null	Qualify	Open
	40000	44000	10/4/2014	10/18/2014	11/7/2014	Closed	Won
	30000	null	4/28/2014	5/12/2014	null	Develop	Open
	10800	null	11/26/2014	12/10/2014	null	Propose	Open
	22000	null	2/10/2015	2/24/2015	null	Develop	Open
	40000	0	1/22/2014	2/5/2014	2/15/2014	Closed	Lost
	95000	0	12/25/2014	1/8/2015	1/28/2015	Closed	Lost
	22000	0	3/10/2015	3/24/2015	4/13/2015	Closed	Lost
	150000	0	2/10/2015	2/24/2015	3/16/2015	Closed	Lost
	34000	0	3/3/2015	3/17/2015	4/6/2015	Closed	Lost
	80000	40000	5/28/2015	null	5/28/2015	Closed	Won

### Pivot Column

Use the names in column "Sales Stage" to create new columns.

Values Column ⓘ

Estimated Amount

Advanced options

[Learn more about Pivot Column](#)

OK Cancel

Status	Salesperson	Lead Source	Territory	Practice	Closed	Propose	Quality	Develop
Open	Chuck Price	Advertisement	Midwest	Dynamics AX	null	null	null	30000
Won	Bill Smith	Web	Northeast	Dynamics GP	95000	null	null	null
Lost	Janice Baker	Trade Show	Northeast	Dynamics AX	95000	null	null	null
Won	Barabra Watson	Web	Midwest	Dynamics GP	30000	null	null	null
Open	Tiffany Jones	Trade Show	Southeast	Dynamics GP	null	null	null	22000
Won	Dave Green	Trade Show	Northeast	Dynamics AX	15000	null	null	null
Lost	Dave Green	Web	Northeast	Dynamics AX	150000	null	null	null
Open	Chris West	Employee Referral	Southeast	Office 365	null	null	40000	null
Won	Bill Smith	Web	Northeast	Dynamics GP	300	null	null	null
Open	Chris West	Web	Southeast	Office 365	null	10800	null	null
Won	Steve Thompson	Employee Referral	Northeast	Dynamics CRM	150000	null	null	null

+ - 10<sup>2</sup> Trigonometry ⏏  
+ x Standard Scientific ⏏  
⏏ Information ⏏  
 From Number

📅 🕒 🕒  
 Date Time Duration

Age  
 Date Only  
 Year  
 Month  
 Day  
 Quarter  
 Week  
 Subtract Days

Create a new column that contains the duration between the current local time and the values in the selected column.

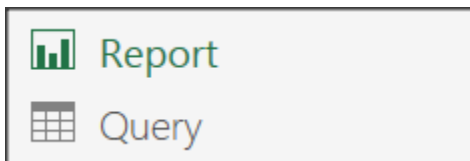
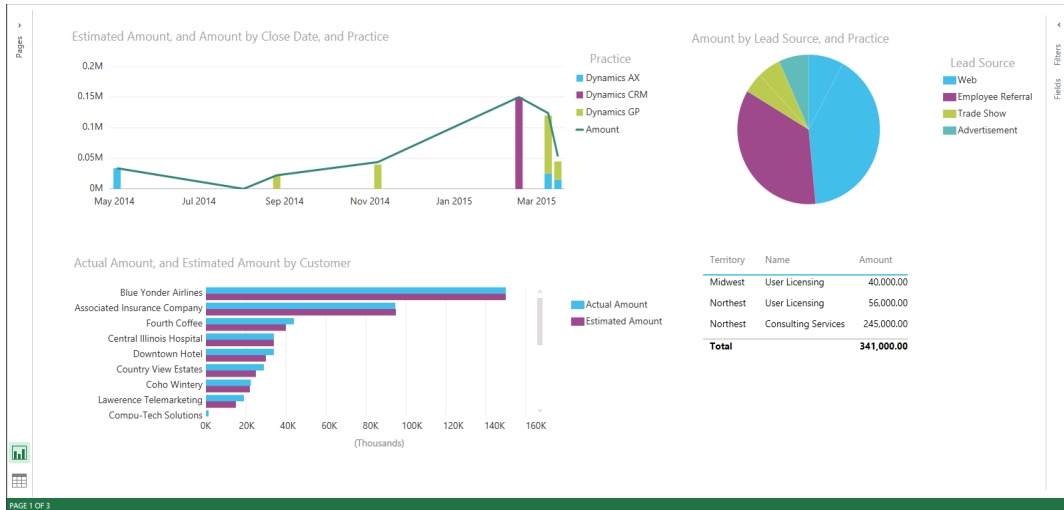
Created On	Estimated Close Date	Status	Practice
2/3/2015	2/3/2015	Closed	Won
7/23/2014	7/23/2014	Closed	Won
6/29/2014	6/29/2014	Closed	Won
3/30/2014	3/30/2014	Closed	Won
2/10/2015	2/10/2015	Closed	Won

From Date & Time	Duration	Salesperson	Lead Source	Territory	Practice	AgeFromDate	
3/9/2015 11:00 AM	148.00:00:00	Bill Smith	Web	Northest	Dynamics GP	148.00:00:00	
8/26/2014 11:00 AM	343.00:00:00	Bill Smith	Trade Show	Northest	Dynamics GP	343.00:00:00	
8/2/2014 11:00 AM	367.00:00:00			Northest	Dynamics GP	367.00:00:00	
5/3/2014 11:00 AM	458.00:00:00			Northest	Dynamics AX	458.00:00:00	
3/16/2015 11:00 AM	141.00:00:00		Show	Northest	Dynamics AX	141.00:00:00	
2/16/2015 11:00 AM	169.00:00:00	Steve Thompson	Employee Referral	Northest	Dynamics CRM	169.00:00:00	
null	Propose	Open	Steve Thompson	Trade Show	Northest	Dynamics CRM	73.00:00:00

From Date & Time	Duration	Salesperson	Lead Source	Territory	Practice	AgeFromDate	
3/9/2015 11:00 AM	148.00:00:00	Bill Smith	Web	Northest	Dynamics GP	148.00:00:00	
8/26/2014 11:00 AM	343.00:00:00	Bill Smith	Trade Show	Northest	Dynamics GP	343.00:00:00	
8/2/2014 11:00 AM	367.00:00:00			Northest	Dynamics GP	367.00:00:00	
5/3/2014 11:00 AM	458.00:00:00			Northest	Dynamics AX	458.00:00:00	
3/16/2015 11:00 AM	141.00:00:00		Show	Northest	Dynamics AX	141.00:00:00	
2/16/2015 11:00 AM	169.00:00:00	Steve Thompson	Employee Referral	Northest	Dynamics CRM	169.00:00:00	
null	Propose	Open	Steve Thompson	Trade Show	Northest	Dynamics CRM	73.00:00:00



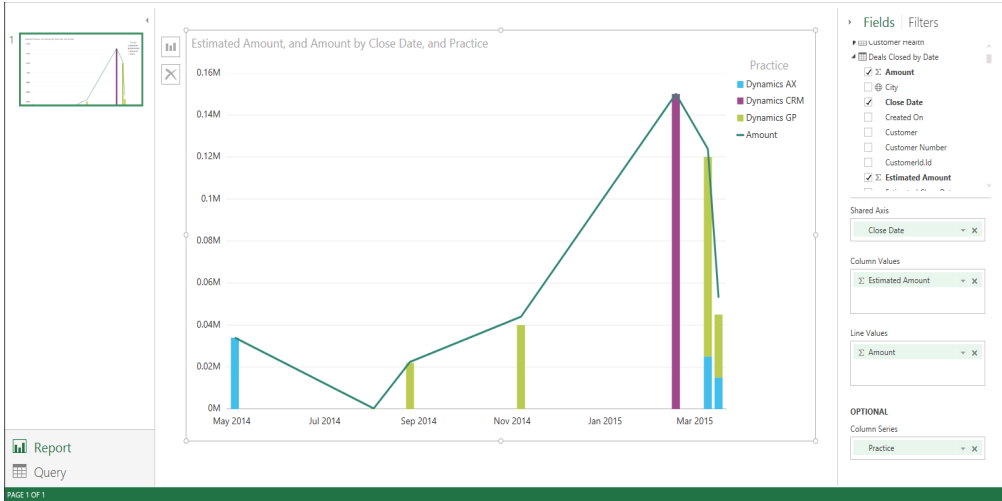
# Chapter 4



Fields | Filters

Opportunities

- Account Number
- Σ Amount
- City
- Close Date
- Customer
- CustomerId.Id
- Σ Estimated Amount
- Estimated Close Date



Fields | Filters

- Customer Name
- Deals Closed by Date
- Σ Amount
- City
- Close Date
- Created On
- Customer
- Customer Number
- CustomerId.Id
- Σ Estimated Amount

Shared Axis

Close Date

Column Values

Σ Estimated Amount

Line Values

Σ Amount

OPTIONAL

Column Series

Practice

> **Fields** | Filters

Deals Closed by Date

- Amount**
- City
- Close Date**
- Created On
- Customer
- Customer Number
- CustomerId.Id
- Estimated Amount**
- Estimated Close Date
- Fiscal Quarter
- Lead Source
- Month
- Name
- OpportunityId
- OriginatingLeadId.Id
- OwnerId.Id
- Practice**

The image shows the Microsoft Power BI ribbon interface. The 'Home' tab is active, and the 'Visualize' group is expanded. The 'Visualize' group contains several icons for data visualization: a bar chart, a line chart, a scatter plot, a table, a pie chart, a grid, a list, and a funnel. Below the ribbon, the 'Get Data' and 'Refresh' buttons are visible.

**Shared Axis**

Close Date ▼ ✕

**Column Values**

Σ Estimated Amount ▼ ✕

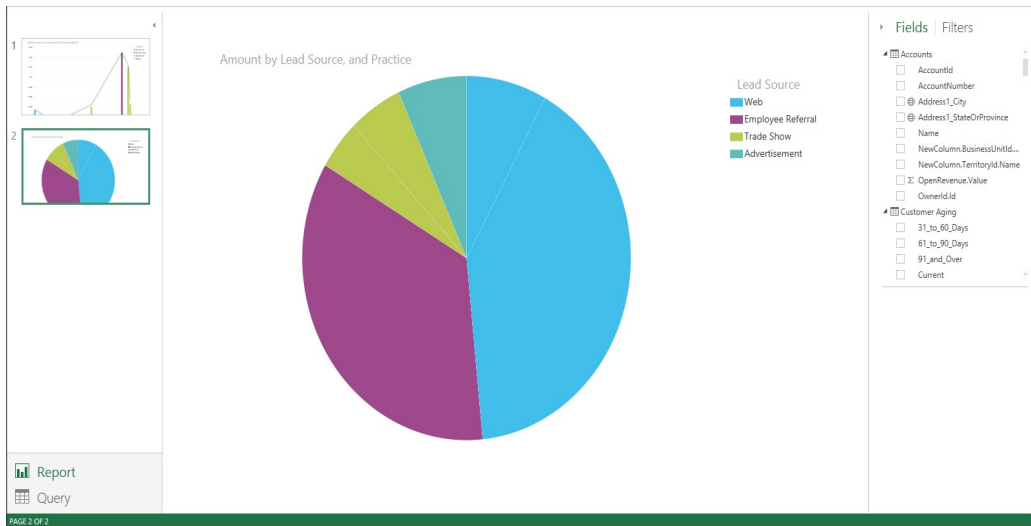
**Line Values**

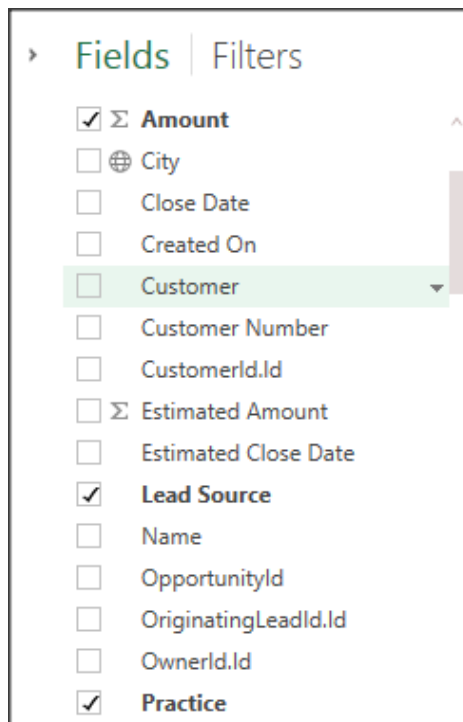
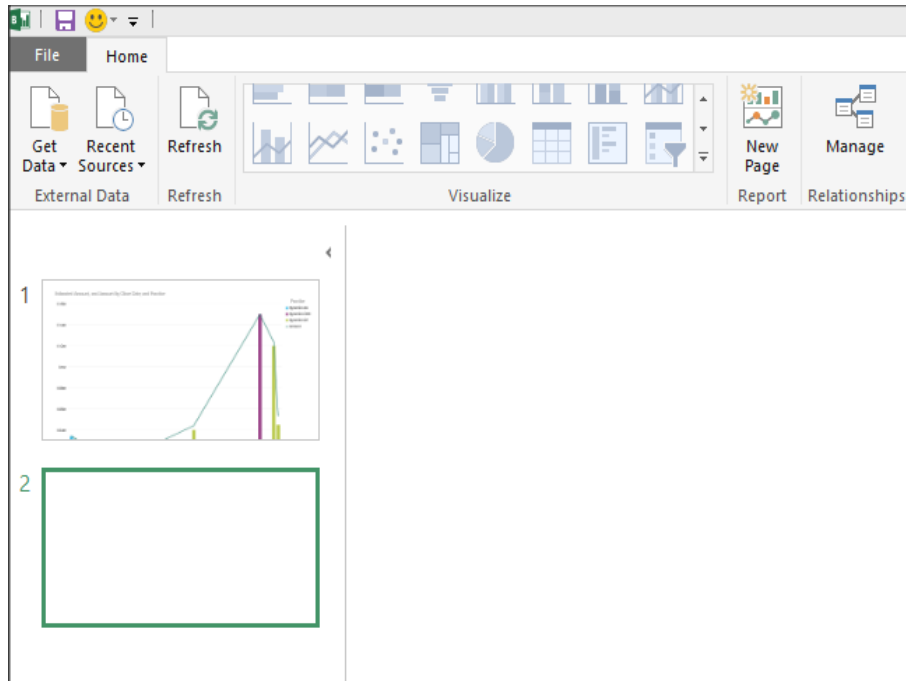
Σ Amount ▼ ✕

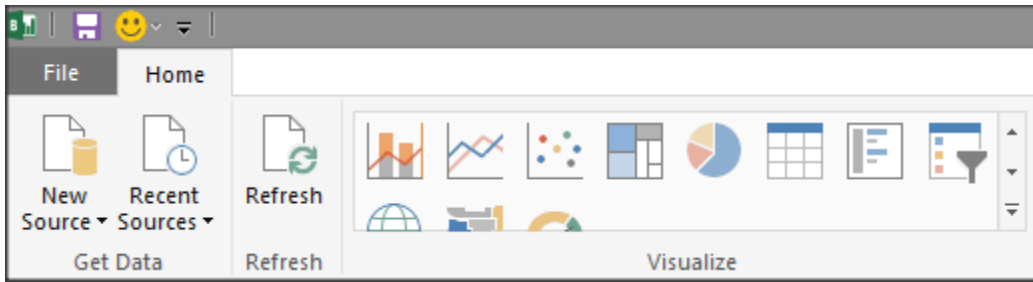
**OPTIONAL**

**Column Series**

Practice ▼ ✕







**Values**

Σ Amount

**OPTIONAL**

**Legend**

Lead Source

**Details**

Practice

1

2

3

Territory	Name	Amount
Midwest	User Licensing	40,000.00
Northeast	User Licensing	56,000.00
Northeast	Consulting Services	245,000.00
<b>Total</b>		<b>341,000.00</b>

**Fields | Filters**

- Lost Deals by Territory
  - Amount
  - Customer
  - Name
  - Territory
- Map by Territory
  - Amount
  - City
  - Close Date
  - Created On
  - Customer
  - Customer Number
  - CustomerId.Id
  - Days Open
  - Estimated Amount
  - Estimated Close Date
  - Lead Source
  - Name

**Fields**

- Territory
- Name
- Σ Amount

Report  
 Query

PAGE 3 OF 3

> **Fields** | Filters  
 ▲ Lost Deals by Territory  
  $\Sigma$  **Amount**  
 Customer  
 **Name**  
 **Territory**

Territory	Name	Amount
Midwest	User Licensing	40,000.00
Northeast	User Licensing	56,000.00
Northeast	Consulting Services	245,000.00
<b>Total</b>		<b>341,000.00</b>

Fields

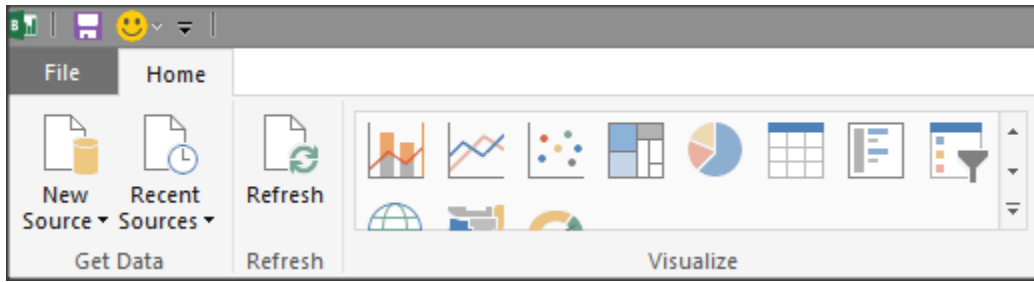
- Territory ▾ ✕
- Name ▾ ✕
- $\Sigma$  Amount ▾ ✕



Fields | Filters

- $\Sigma$  **Develop**
- Estimated Close Date
- Lead Source
- OpportunityId
- OriginatingLeadId.Id
- OwnerId.Id
- Practice**
- $\Sigma$  **Propose**
- $\Sigma$  **Qualify**
- Salesperson**
- $\text{globe}$  State
- Status
- Territory





Value

- Σ Qualify
- Σ Develop
- Σ Propose

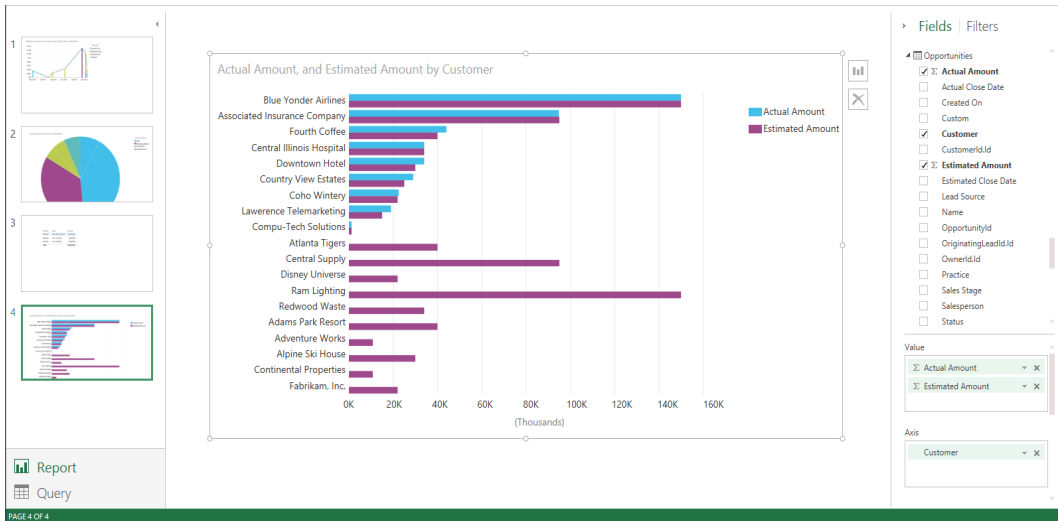
Axis

- Practice
- Salesperson

**OPTIONAL**

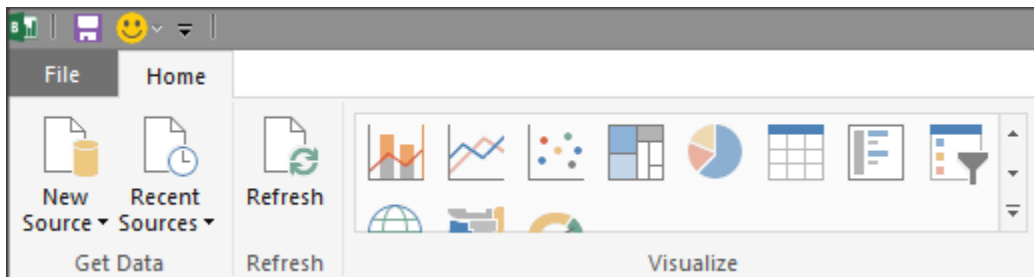
Legend

- Σ Value



Fields | Filters

- Opportunities
  - $\Sigma$  Actual Amount
  - Actual Close Date
  - Created On
  - Custom
  - Customer
  - CustomerId.Id
  - $\Sigma$  Estimated Amount

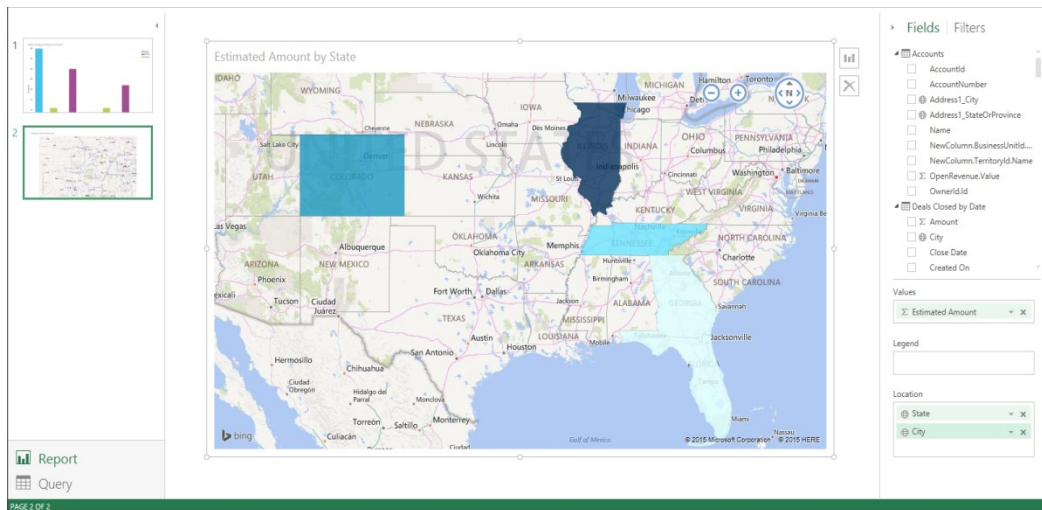


**Value**


- Σ Actual Amount
- Σ Estimated Amount




**Axis**

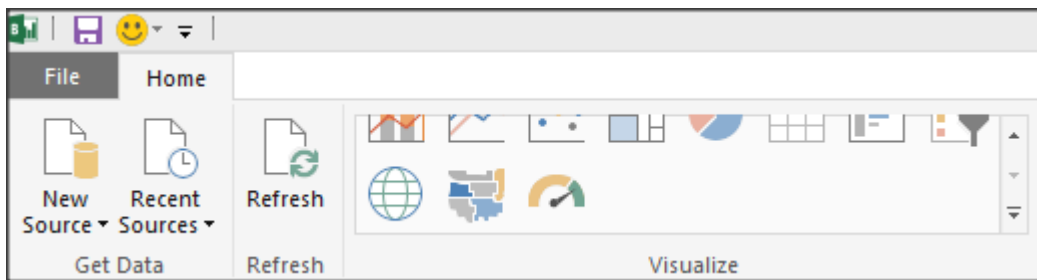
- Customer



> **Fields** | Filters

▲  Map by Territory ^

- $\Sigma$  Amount
-  **City**
- Close Date
- Created On
- Customer
- Customer Number
- CustomerId.Id
- $\Sigma$  Days Open
- $\Sigma$  **Estimated Amount**
- Estimated Close Date
- Lead Source
- Name
- OpportunityId
- OriginatingLeadId.Id
- OwnerId.Id
- Practice
- Sales Stage 
- Salesperson
-  **State**



The image shows the top portion of the Power BI Desktop ribbon. The **File** and **Home** tabs are visible. Under the **File** tab, there are buttons for **New Source** and **Recent Sources**, with a **Get Data** label below them. Under the **Home** tab, there are **Refresh** buttons. The **Visualize** section contains various visualization icons: a bar chart, a line chart, a scatter plot, a table, a pie chart, a funnel chart, a globe, a map of the United States, and a gauge chart.

### Values

Σ Estimated Amount

### Legend

### Location

State

City

1

2

3

Adams Park Resort	Indianapolis	IL	Office 365	Chris West	Subscriptions	40,000.00	14
Adventure Works	Tampa	FL	Dynamics CRM	Steve Thompson	User Licensing	10,800.00	1
Alpine Ski House	Denver	CO	Dynamics AX	Chuck Price	Consulting Services	30,000.00	357
Continental Properties	Atlanta	GA	Office 365	Chris West	Subscriptions	10,800.00	145
Fabrikam, Inc.	Nashville	TN	Dynamics GP	Tiffany Jones	Consulting Services	22,000.00	69

#### Fields | Filters

Map by Territory

- Amount
- City
- Close Date
- Created On
- Customer
- Customer Number
- CustomerId
- Days Open
- Estimated Amount
- Estimated Close Date
- Lead Source
- Name
- OpportunityId
- OriginatingLeadId
- OwnerId
- Practice
- Sales Stage
- Salesperson
- State

#### Fields

- Customer
- City
- State
- Practice
- Salesperson
- Name

Report

Query

PAGE 3 OF 3

> **Fields** | Filters

Map by Territory

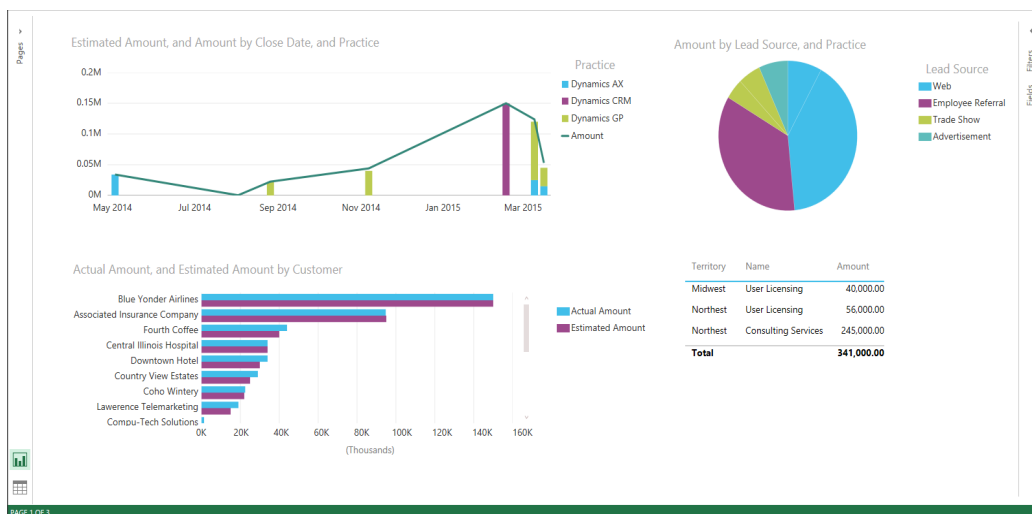
- $\Sigma$  Amount
- $\oplus$  **City**
- Close Date
- Created On
- Customer**
- Customer Number
- CustomerId.Id
- $\Sigma$  **Days Open**
- $\Sigma$  **Estimated Amount**
- Estimated Close Date
- Lead Source
- Name**
- OpportunityId
- OriginatingLeadId.Id
- OwnerId.Id
- Practice**
- Sales Stage
- Salesperson**
- $\oplus$  **State**

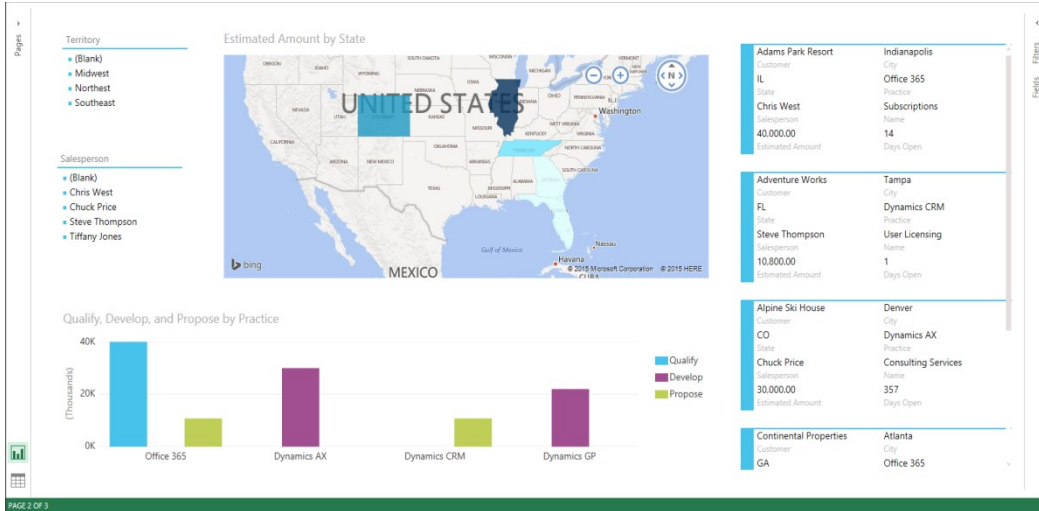
File Home

New Source Recent Sources Refresh Refresh Visualize

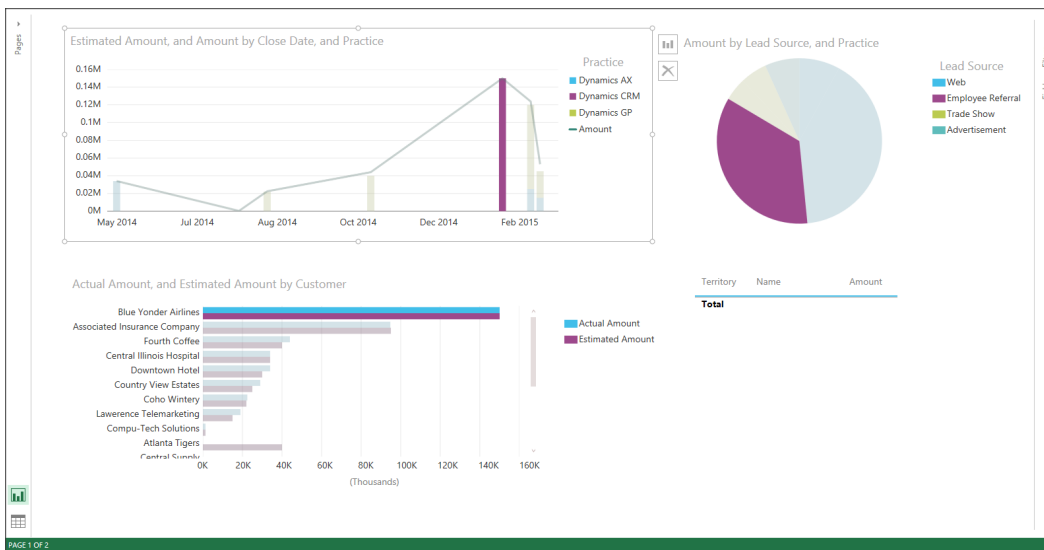
### Fields

Customer	▼	✕
City	▼	✕
State	▼	✕
Practice	▼	✕
Salesperson	▼	✕
Name	▼	✕
Σ Estimated Amount	▼	✕
Σ Days Open	▼	✕

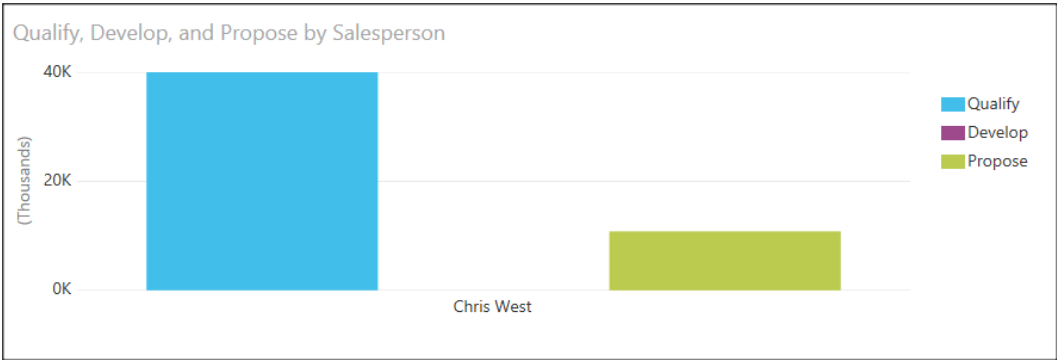
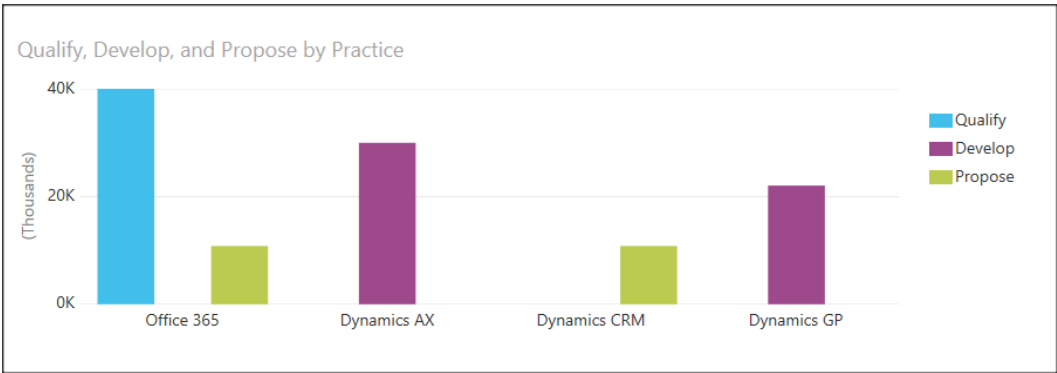
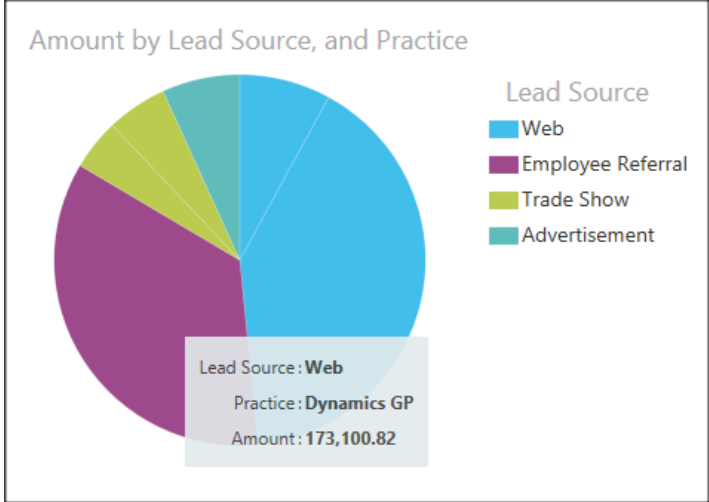


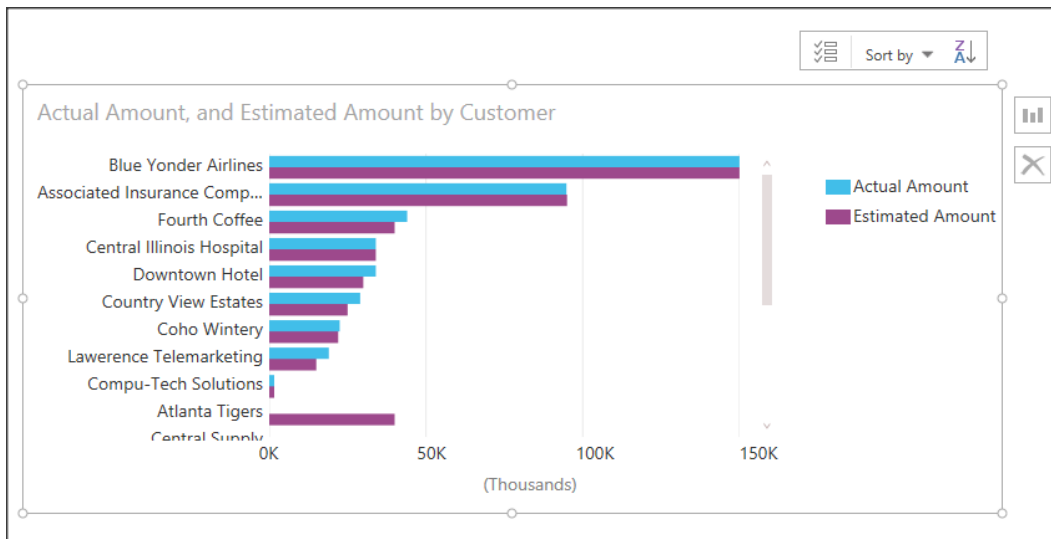
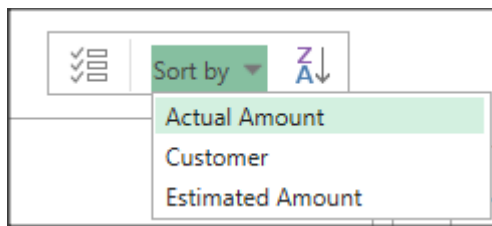


## Chapter 5









fx = Table.ReorderColumns(#"Filtered Rows",{"Name", "Customer", "Estimated Amou

Created On	Estimated Close Date	Actual Close Date	Sales Stage	Status	Salesperson
2/3/2015	2/2/2015				Bill Smith
7/23/2014	8/2/2014				Bill Smith
6/29/2014	7/1/2014				Bill Smith
3/30/2014	4/1/2014				Dave Green
2/10/2015	2/1/2015				Dave Green
1/13/2015	1/1/2015				Steve Thompson
4/19/2015	5/1/2015				Steve Thompson
2/10/2015	2/1/2015				Barabra Watson
2/3/2015	2/1/2015				Corey Preston
4/6/2015	4/1/2015				Chris West
10/4/2014	10/1/2014				Tiffany Jones
4/28/2014	5/1/2014				Chuck Price
1/26/2014	12/1/2013				Chris West
2/10/2015	2/1/2015				Tiffany Jones
1/22/2014	2/1/2014				Chuck Price
2/25/2014	1/8/2015	1/28/2015	Closed	Lost	Janice Baker
3/10/2015	3/24/2015	4/13/2015	Closed	Lost	Janice Baker
2/10/2015	2/24/2015	3/16/2015	Closed	Lost	Dave Green
3/3/2015	3/17/2015	4/6/2015	Closed	Lost	Dave Green

Name	Customer	Estimated Amount	Actual Amount	Created On	Estimated Close Date	Actual Close Date	Sales Stage	Status	Salesperson
User Licensing	Atlanta Tigers	40000	0	1/22/2014	2/5/2014	2/15/2014	Closed	Lost	Chuck Price
Consulting Services	Central Supply	95000	0	12/25/2014	1/8/2015	1/28/2015	Closed	Lost	Janice Baker
User Licensing	Disney Universe	22000	0	3/10/2015	3/24/2015	4/13/2015	Closed	Lost	Janice Baker
Consulting Services	Ram Lighting	150000	0	2/10/2015	2/24/2015	3/16/2015	Closed	Lost	Dave Green
User Licensing	Redwood Waste	84000	0	3/3/2015	3/17/2015	4/6/2015	Closed	Lost	Dave Green

16 COLUMNS, 5 ROWS

PREVIEW DOWNLOADED ON TUESDAY.

Estimated Amount	Actual Amount	Created On	Estimated Close Date	Actual Close Date
			2/17/2015	
			8/6/2014	
			7/13/2014	
			4/13/2014	
			2/24/2015	

Sort Ascending  
Sort Descending  
Clear Sort  
Clear Filter

**Date Filters**

Search

- (Select All)
- 1/22/2014
- 3/30/2014
- 4/28/2014
- 6/29/2014
- 7/23/2014
- 10/4/2014
- 11/26/2014
- 12/25/2014
- 1/13/2015
- 2/3/2015
- 2/10/2015
- 3/3/2015
- 3/10/2015
- 4/6/2015

- Equals...
- Before...
- After...
- Between...
- In the Next...
- In the Previous...
- Day >
- Week >
- Month >
- Quarter >
- Year >
- Custom Filter...

**Filter Rows**

Show rows where: Created On

And
  Or

Fields | **Filters**

PAGE | **CHART**

Fields | Filters

PAGE | CHART

Σ Amount

(All)

Lead Source

(All)

Practice

(All)

Practice



is Dynamics AX or Dynamics CRM

- (All)
- (Blank) 1
- Dynamics AX 3
- Dynamics CRM 1
- Dynamics GP 5

Σ Amount



is less than 50,000.00

Show items for which the value:

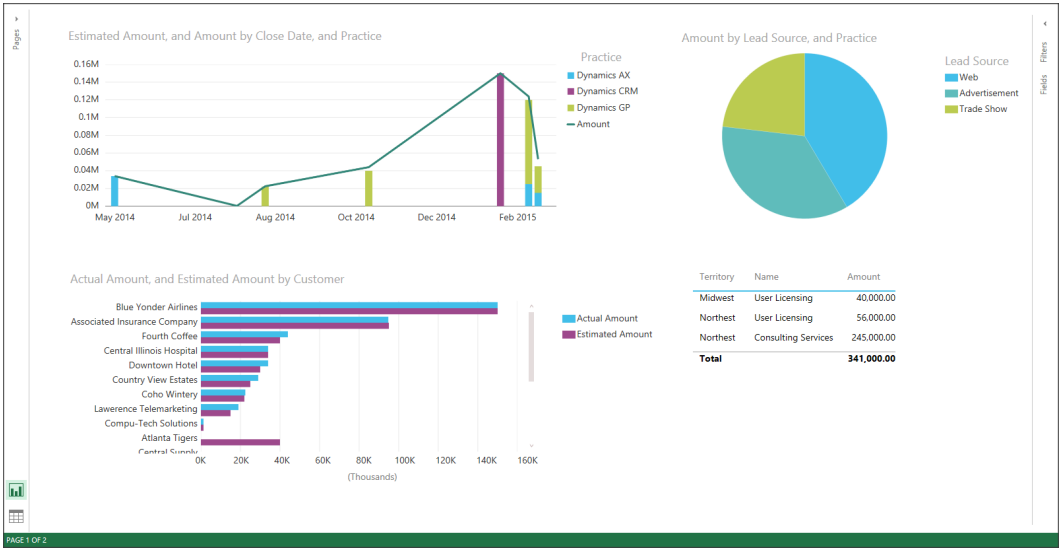
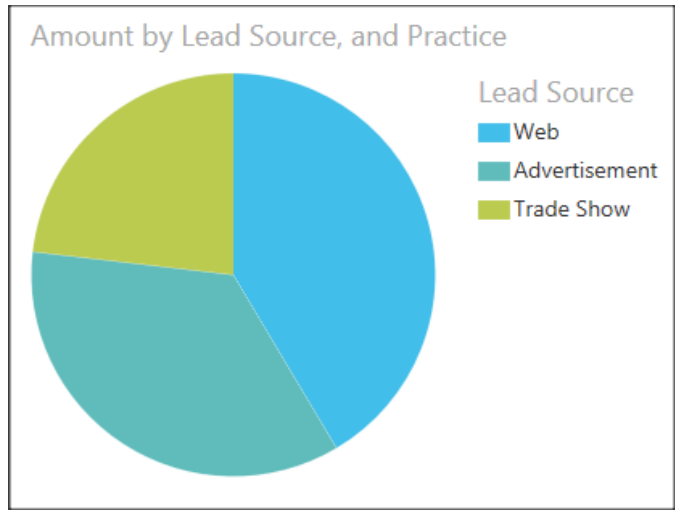
is less than ▼

50000

And Or

▼

Apply Filter



**Quarter** ▼

is 1

- (All)
- (Blank) 1
- 1 11
- 2 4
- 3 1
- 4 3

**Year** ▼

is 2015

- (All)
- (Blank) 1
- 2014 8
- 2015 11

**Territory**

- (Blank)
- Midwest
- Northeast
- Southeast

**Salesperson**

- (Blank)
- Chris West
- Chuck Price
- Steve Thompson
- Tiffany Jones

Estimated Amount by State

<b>Adams Park Resort</b> Customer IL Year: 2015 Salesperson: Chris West 40,000.00 Estimated Amount	<b>Indianapolis</b> City Office 365 Practice Subscriptions Name: Chris West 14 Days Open
<b>Adventure Works</b> Customer FL State: Steve Thompson 10,800.00 Salesperson Estimated Amount	<b>Tampa</b> City Dynamics CRM Practice User Licensing Name: Steve Thompson 1 Days Open
<b>Alpine Ski House</b> Customer CO State: Chuck Price 30,000.00 Salesperson Estimated Amount	<b>Denver</b> City Dynamics AX Practice Consulting Services Name: Chuck Price 357 Days Open
<b>Continental Properties</b> Customer GA State: Chris West 10,800.00 Salesperson	<b>Atlanta</b> City Office 365 Practice Subscriptions Name: Chris West 145

Qualify, Develop, and Propose by Practice


Practice	Qualify	Develop	Propose
Office 365	~38	~10	~10
Dynamics AX	~30	~25	~10
Dynamics CRM	~10	~10	~10
Dynamics GP	~10	~20	~10

PAGE 2 OF 2

Territory

---

- (Blank)
- Midwest
- Northeast
- Southeast



Salesperson

---

- (Blank)
- Chris West
- Chuck Price
- Steve Thompson
- Tiffany Jones



# Chapter 6

Microsoft Dynamics GP

Home > Sales > Customers

Microsoft Dynamics GP > Transactions > Inquiry > Reports > Cards

Apply Sales Documents | Aging | Assess Finance Charges | Print Statements | Edit | Delete | Apply Hold | Remove Hold | Customer | Order | Payments | All Customers | Reports | Go To

Customers (read only) - Type to filter Hide Options

Show results

Add Filter

<input type="checkbox"/>	Customer Name	Customer ID	Phone Number	Contact
<input type="checkbox"/>	Aaron Fitz Electrical	AARONFIT0001	(425) 555-0101 Ext. 0000	Bob Fitz
<input type="checkbox"/>	Adam Park Resort	ADAMPARK0001	(317) 555-0102 Ext. 0000	Roberta Masouras
<input type="checkbox"/>	Advanced Paper Co.	ADVANCED0001	(312) 555-0103 Ext. 0000	Manoj Monat
<input type="checkbox"/>	Advanced Tech Satellite System	ADVANCED0002	(416) 555-0104 Ext. 0000	Grant Lasko
<input type="checkbox"/>	Alton Manufacturing	ALTONMAN0001	(313) 555-0105 Ext. 0000	Jennifer Rossini
<input type="checkbox"/>	American Electrical Contractor	AMERICAN0002	(319) 555-0107 Ext. 0000	Sue Almassy-Wicker
<input type="checkbox"/>	American Science Museum	AMERICAN0001	(314) 555-0106 Ext. 0000	Andrew MacWilliams
<input type="checkbox"/>	Associated Insurance Company	ASSOCIAT0001	(402) 555-0108 Ext. 0000	Dmitry Rodin

0 of 104 records selected.

AARONFIT0001 : Aaron Fitz Electrical

Bill To Address : One Microsoft Way Redmond, WA 98052-6399 USA	Customer Priority : None Current Balance : \$24,272.06 Credit Limit : \$35,000.00	Last Payment Date : 4/29/2017 Last Payment Amount : \$609.75 Year to Date Sales : \$59,567.47 Last Year Sales : \$0.00
Salesperson : Paul West	Payment Terms : Net 30 Average Days to Pay - YTD : 0	

4/12/2017 Fabrikam, Inc. sa

SQLQuery1.sql - 2QHPXY1\SCRIBE.TWO (TRIBF

File Edit View Project Debug Tools Window Help

Object Explorer

Connect

- 2QHPXY1\SCRIBE (SQL Server 11.0)
  - Databases
    - System Databases
    - SCRIBEINTERNAL
    - SCRIBESAMPLE
    - TWO
      - Database Diagrams
      - Tables
      - Views
      - Synonyms
      - Programmability
      - Service Broker
      - Storage
      - Security
    - Security
    - Server Objects
    - Replication
    - Management

SQLQuery1.sql - 2Q...DGE\Stevellvie (59)\*

```

else 0
end) [61_to_90_Days],

sum(case
when DATEDIFF(d, RM.DUEDATE, getdate()) > 90
and RM.RMDTYPAL < 7 then RM.CURTRXAM
when DATEDIFF(d, RM.DOCDATE, getdate()) > 90
and RM.RMDTYPAL > 6 then RM.CURTRXAM *-1
else 0
end) [91_and_Over],

CS.LASTPYDT Last_Payment_Date,
CS.LPYMTAMT Last_Payment_Amount

from RM20101 RM

inner join RM00101 CM
on RM.CUSTNMBR = CM.CUSTNMBR
inner join RM00103 CS
on RM.CUSTNMBR = CS.CUSTNMBR

```

100 %

Results Messages

	Customer_ID	Customer_Name	Customer_Terms	Customer_Class
1	AARONFIT0001	Aaron Fitz Electrical	Net 30	USA-ILMO-T1
2	ADAMPARK0001	Adam Park Resort	Net 30	USA-INMI-T2
3	ADVANCED0001	Advanced Paper Co.	Net 30	USA-ILMO-T1
4	ADVANCED0002	Advanced Tech Satellite System	Net 30	CAN-ONMBSK-T6
5	ALTONMAN0001	Alton Manufacturing	2% 10/Net 30	USA-INMI-T2
6	AMERICAN0001	American Science Museum	Net 30	USA-ILMO-T1

File Home Transform Add Column View

Get Data Recent Sources Refresh Properties Choose Columns Remove Columns Keep Rows Remove Rows Remove Duplicates Remove Errors

Most Common Query Manage Columns Reduce Rows

Excel SQL Server CSV Web OData Feed Blank Query More...

SQL Server  
Import data from a Microsoft SQL Server database.

AccountNumber Customer

1	ADAMPARK0001	Adams Park Resort
2	BLUONND0001	Blue Yonder Airlines
3	ASSOCIAT0001	Associated Insurance Company
4	CENTRALI0001	Central Illinois Hospital
5	COHOWINE0001	Coho Wintery
6	CONTINEN0001	Continental Properties
7	DOWNTOWN0001	Downtown Hotel
8	LAWRENCE0001	Lawerence Telemarketing
9	COMPUTES0001	Compu-Tech Solutions
10	CONTRYV0001	Country View Estates
11	FOURTHCO0001	Fourth Coffee
12	TRIBRIDGE0001	Tribridge

= Table.RenameColumns("#Trim

Microsoft SQL Database

Import data from a Microsoft SQL Server database.

Server  
DYNSE

Database  
TWO

SQL statement (optional)

```
select
CM.CUSTNMBR Customer_ID, CM.CUSTNAME Customer_Name,
CM.PYMTRMID Customer_Terms, CM.CUSTCLAS Customer_Class,
CM.PRCLEVEL Price_Level,

sum(case
when RM.RMDTYPAL < 7 then RM.CURTRXAM
else RM.CURTRXAM * -1
end) Total_Due,

sum(case
when DATEDIFF(d, RM.DUEDATE, getdate()) < 31
and RM.RMDTYPAL < 7 then RM.CURTRXAM
```

OK Cancel

Customer_ID	Customer_Name	Customer_Terms	Customer_Class
1	AARONFIT0001	Aaron Fitz Electrical	Net 30
2	ADAMPARK0001	Adam Park Resort	Net 30
3	ADVANCED0001	Advanced Paper Co.	Net 30
4	ADVANCED0002	Advanced Tech Satellite System	Net 30
5	ALTONMAN0001	Alton Manufacturing	2% 10/Net 30
6	AMERICAN0001	American Science Museum	Net 30
7	AMERICAN0002	American Electrical Contractor	Net 30
8	ASSOCIAT0001	Associated Insurance Company	Net 30
9	ASTORSUI0001	Astor Suites	Net 30
10	ATMOREERE0001	Atmore Retirement Center	Net 30
11	BAKERSEM0001	Baker's Emporium Inc.	Net 30

The screenshot shows the 'Format' dropdown menu for the 'Customer\_Name' column. The menu is open, displaying the following options:

- lowercase
- UPPERCASE
- Capitalize Each Word
- Trim
- Clean

### Merge

Select a table and matching columns to create a merged table.

AccountNumber	OwnerId.Id	Name	Address1_City	Address1_State
ADAMPARK0001	bbd99d15-a0bb-e411-80e8-c4346bac3acc	Adams Park Resort	Indianapolis	IL
BLUEYOND0001	88dc6ce9-9fbb-e411-80ea-c4346bac094c	Blue Yonder Airlines	Wichita	KS
CENTRAL0001	88dc6ce9-9fbb-e411-80ea-c4346bac094c	Central Illinois Hospital	Peoria	IL
CONTINEN0001	88dc6ce9-9fbb-e411-80ea-c4346bac094c	Continental Properties	Atlanta	GA
ASSOCIAT0001	64b28425-a0bb-e411-80ea-c4346bad3674	Associated Insurance Company	Lincoln	NE

Customer Aging

Customer_ID	Customer_Name	Customer_Terms	Customer_Region
AARONFIT0001	Aaron Fitz Electrical	Net 30	USA-I
ADAMPARK0001	Adam Park Resort	Net 30	USA-I
ADVANCED0001	Advanced Paper Co.	Net 30	USA-I
ADVANCED0002	Advanced Tech Satellite System	Net 30	CAN-I
ALTONMAN0001	Alton Manufacturing	2% 10/Net 30	USA-I

Only include matching rows

OK Cancel

NewColumn.Total_Due	NewColumn.Current	NewColumn.31_to_60_D...	NewColumn.61_to_90_D...	NewColumn.91_and_O...	NewColumn.Last_Payment_...	NewColumn.Last_Payment_A...
20800.09	3629.73	0	0	17170.36	2/24/2016	641.47
1093.04	695.4	0	0	397.64	1/31/2014	6847.75
36646.45	0	0	0	36646.45	4/22/2017	59.95
38412.31	0	0	0	38412.31	1/5/2014	12750
2690.69	0	0	0	2690.69	1/31/2014	30553.27
1228.65	0	0	0	1228.65	12/31/1899	0
36633.83	0	0	0	36633.83	1/12/2014	41.59
23642.79	513.5	0	0	23129.29	4/21/2017	5135.9
null	null	null	null	null	null	null
null	null	null	null	null	null	null
null	null	null	null	null	null	null

#### Total Due, Current Amount, and Open Revenue by Customer

#### Total Due by State, and Practice

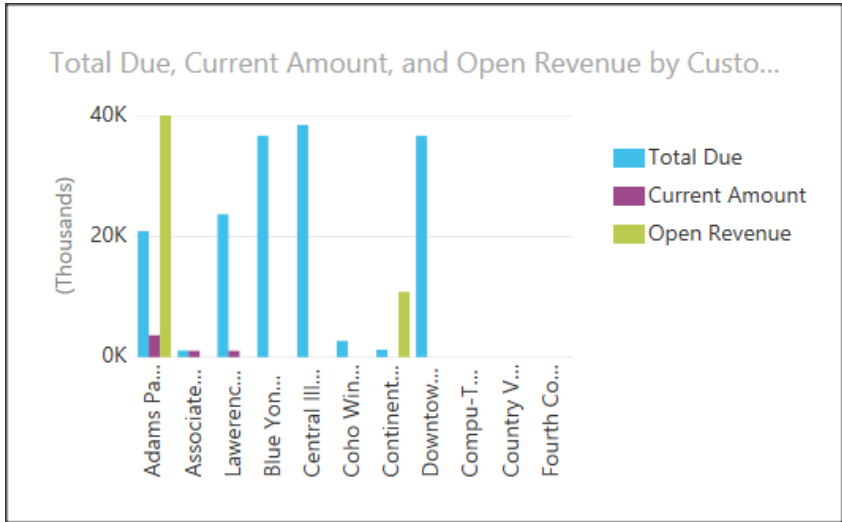
AccountNumber	Customer	Current Amount	Open Revenue	Total Due	30 Days	60 Days	90 Days	Last Payment Date	Last Payment Amount
ADAMPARK0001	Adams Park Resort	3,629.73	40,000.00	20,800.09	0.00	0.00	17,170.36	2/24/2016	641.47
ASSOCIAT0001	Associated Insurance Company	695.40	0.00	1,093.04	0.00	0.00	397.64	1/31/2014	6,847.75
BLUEYOND0001	Blue Yonder Airlines	0.00	0.00	36,646.45	0.00	0.00	36,646.45	4/22/2017	59.95
CENTRAL0001	Central Illinois Hospital	0.00	0.00	38,412.31	0.00	0.00	38,412.31	1/5/2014	12,750.00
COHOWINE0001	Coho Wintery	0.00	0.00	2,690.69	0.00	0.00	2,690.69	1/31/2014	30,553.27
COMPUTES0001	Compu-Tech Solutions	0.00	0.00	0.00	0.00	0.00	0.00		0.00
CONTINEN0001	Continental Properties	0.00	10,800.00	1,228.65	0.00	0.00	1,228.65	12/31/1899	0.00
<b>Total</b>		<b>4,838.63</b>	<b>50,800.00</b>	<b>161,147.85</b>	<b>0.00</b>	<b>0.00</b>	<b>156,309.22</b>		<b>56,029.93</b>

PAGE 3 OF 3

Customer Health

- Σ 30 Days
- Σ 60 Days
- Σ 90 Days
- City
- Σ Current Amount
- Customer Number
- Customer
- Σ Last Payment
- Last Payment
- Σ Open Revenue
- Practice
- State
- Territoy
- Σ Total Due

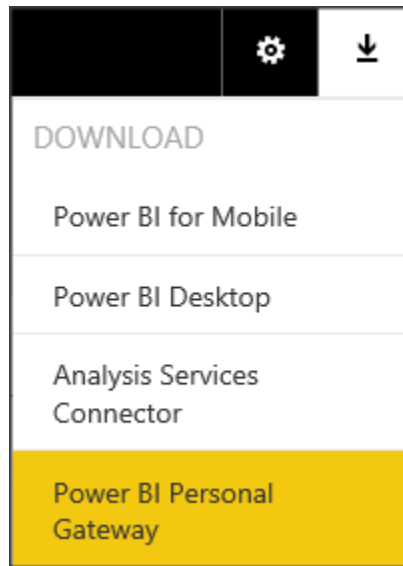
- New Measure
- Rename
- Hide
- Delete
- ✓ View Hidden
- Unhide All

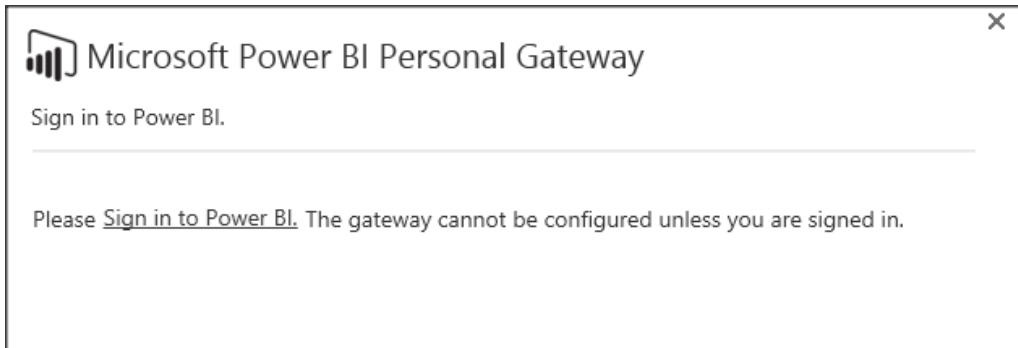
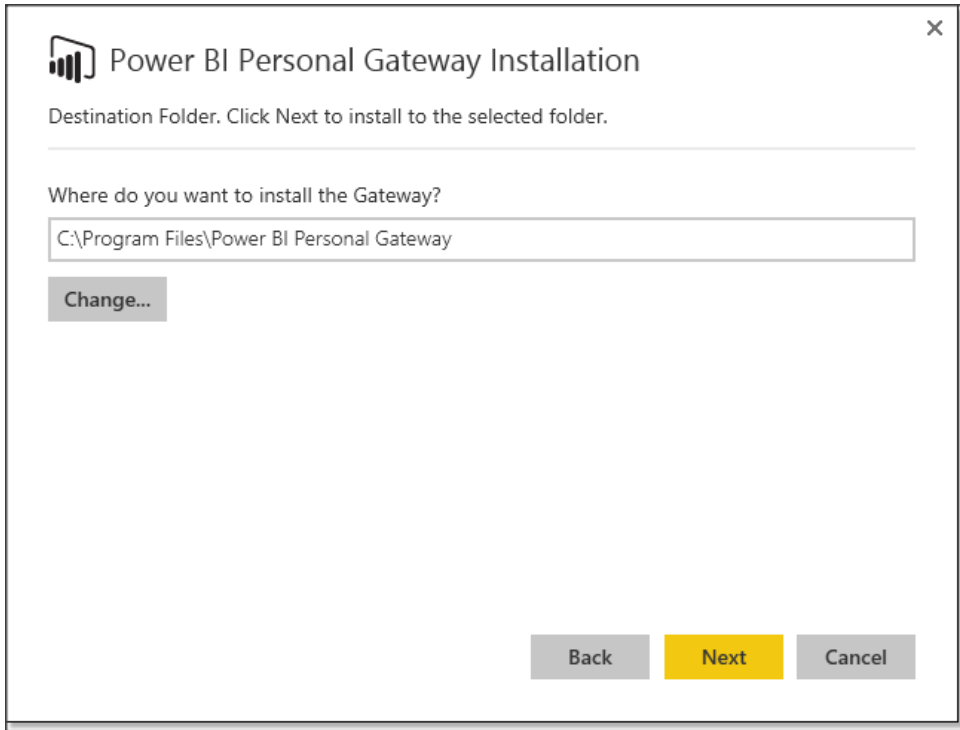


## Total Due by State, and Practice



AccountNumber	Customer	Current Amount	Open Revenue	Total Due	30 Days	60 Days	90 Days	Last Payment Date	Last Payment Amount
ADAMPARK0001	Adams Park Resort	3,629.73	40,000.00	20,800.09	0.00	0.00	17,170.36	2/24/2016	641.47
ASSOCIAT0001	Associated Insurance Company	695.40	0.00	1,093.04	0.00	0.00	397.64	1/31/2014	6,847.75
BLUEYOND0001	Blue Yonder Airlines	0.00	0.00	36,646.45	0.00	0.00	36,646.45	4/22/2017	59.95
CENTRALI0001	Central Illinois Hospital	0.00	0.00	38,412.31	0.00	0.00	38,412.31	1/5/2014	12,750.00
COHOWINE0001	Coho Wintery	0.00	0.00	2,690.69	0.00	0.00	2,690.69	1/31/2014	30,553.27
COMPUTES0001	Compu-Tech Solutions		0.00						
CONTINEN0001	Continental Properties	0.00	10,800.00	1,228.65	0.00	0.00	1,228.65	12/31/1899	0.00
<b>Total</b>		<b>4,838.63</b>	<b>50,800.00</b>	<b>161,147.85</b>	<b>0.00</b>	<b>0.00</b>	<b>156,309.22</b>		<b>56,029.93</b>









## Microsoft Power BI Personal Gateway



We're almost done. You just need to enter your Windows credentials.

- ✓ 1. You're signed in to Power BI
- 2. Enter your Windows account. The service will run using this account.

User name

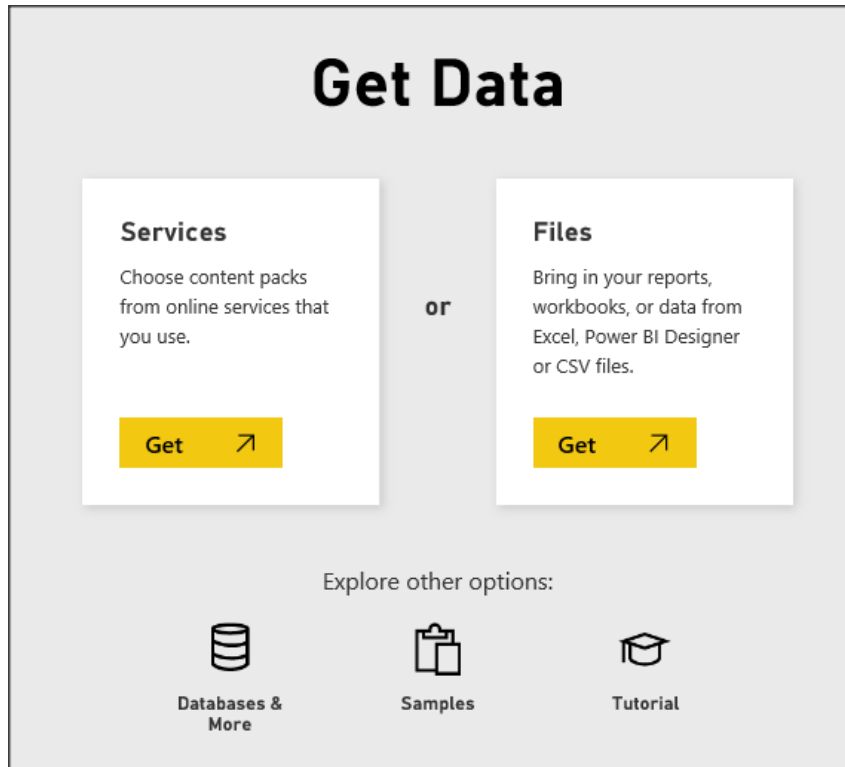
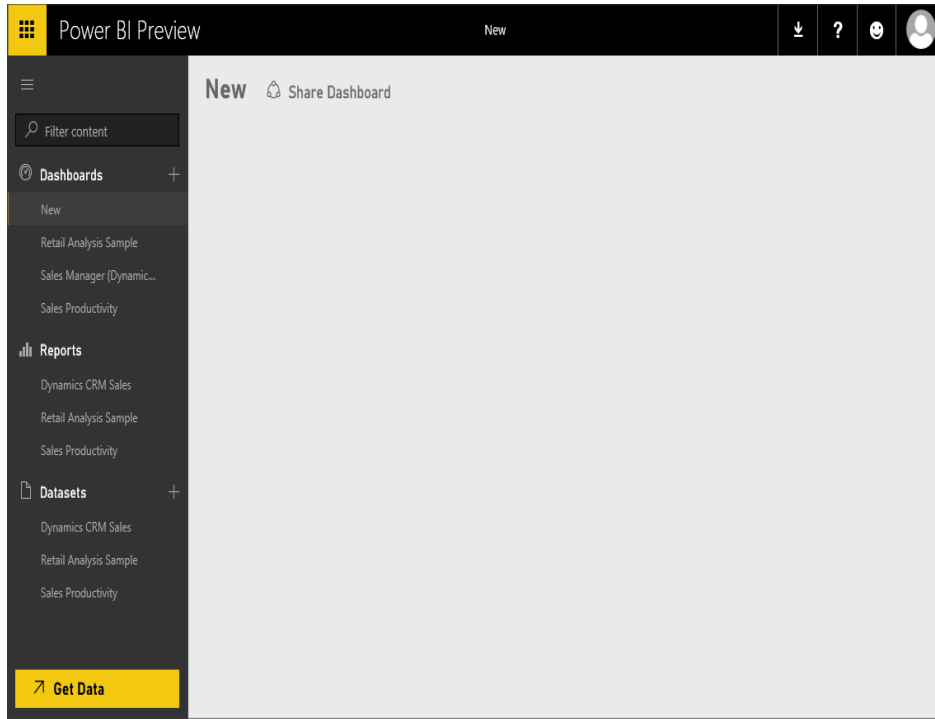
Password

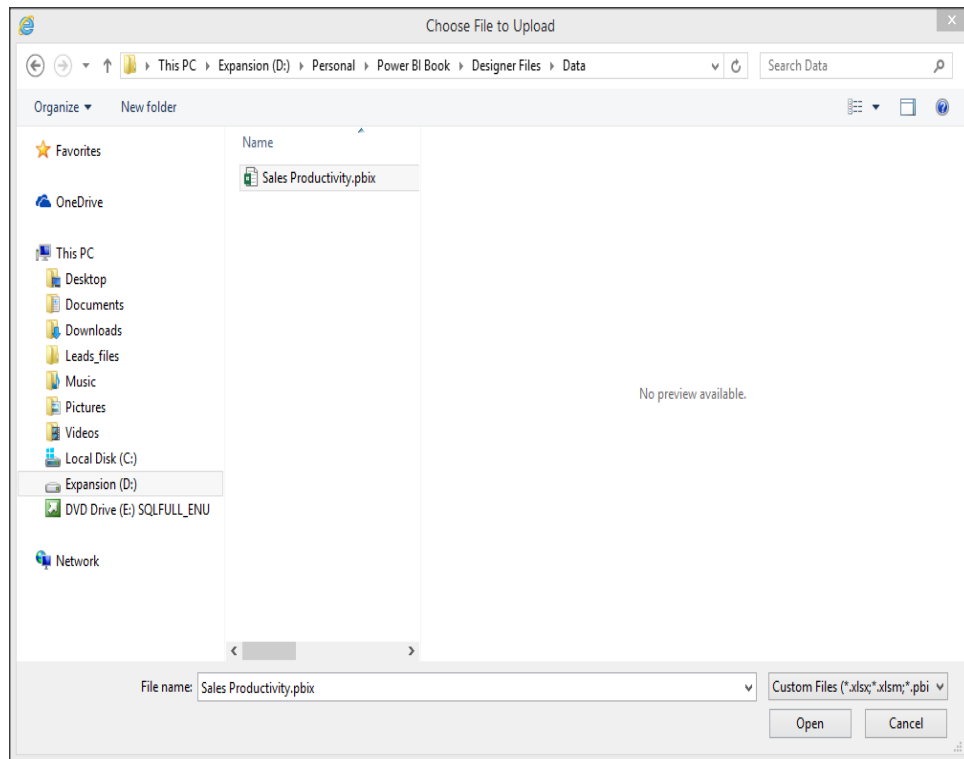
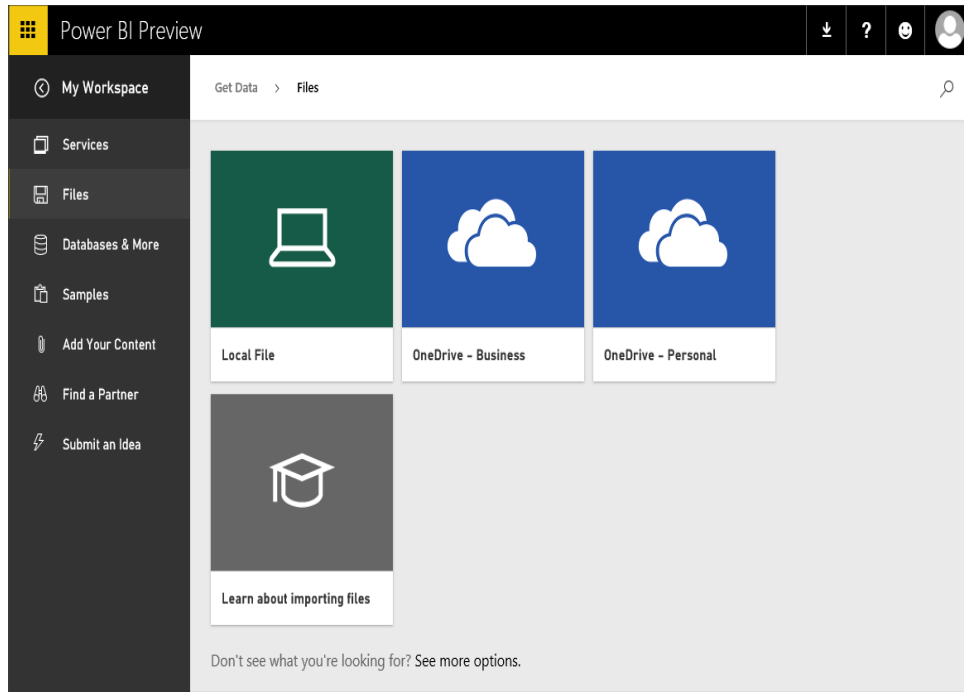
Back

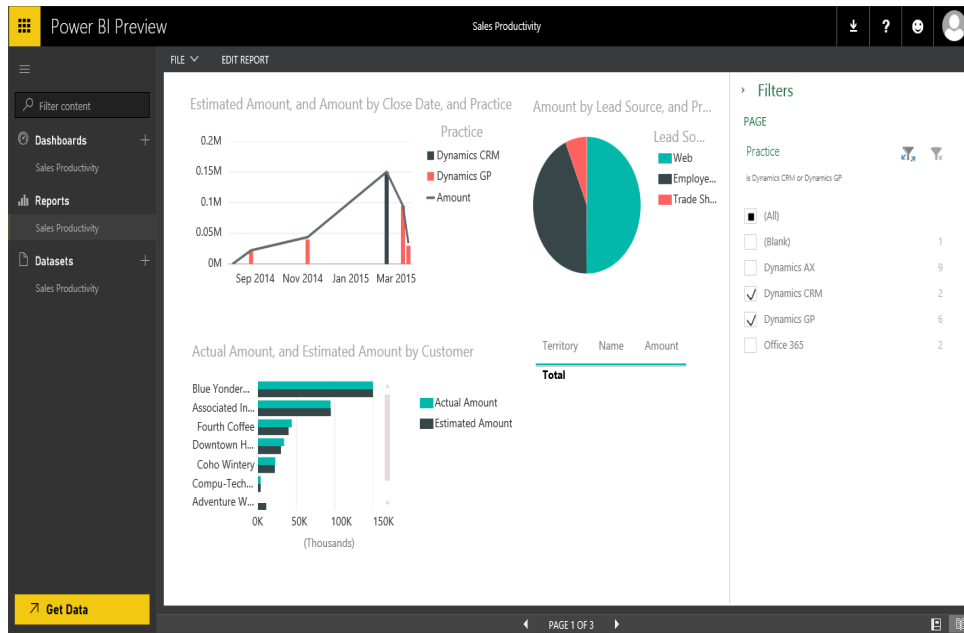
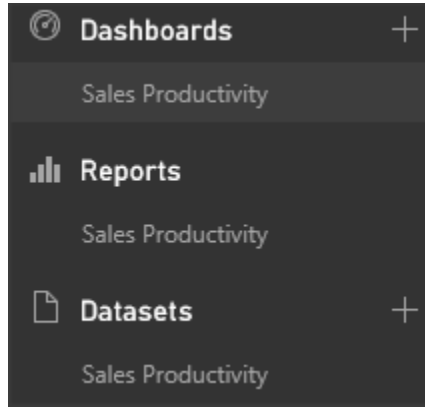
Next

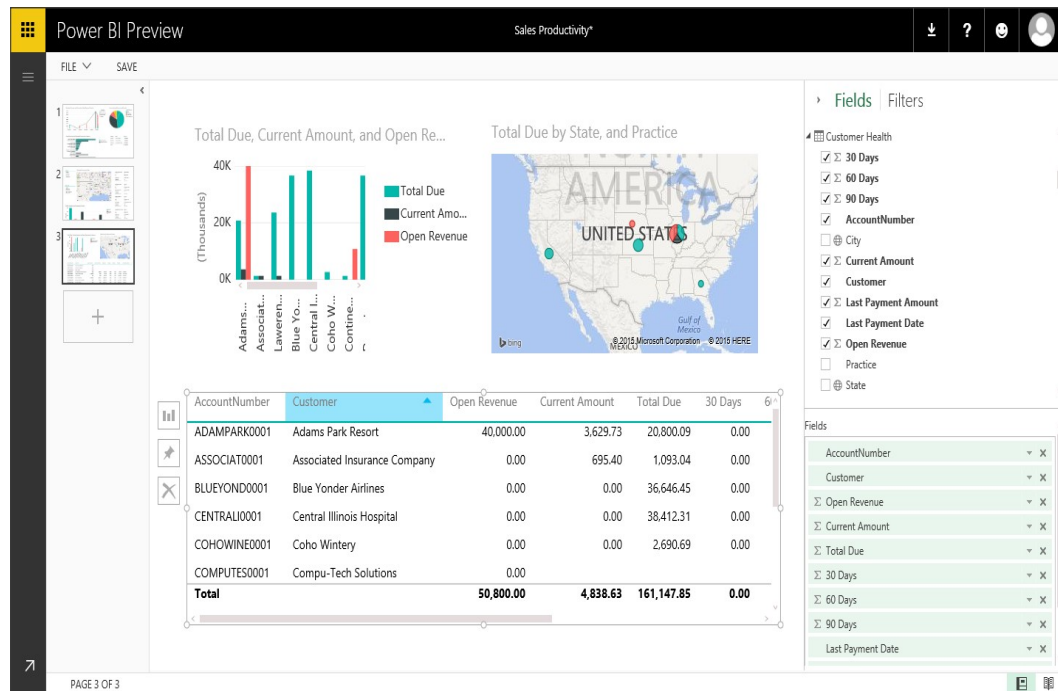
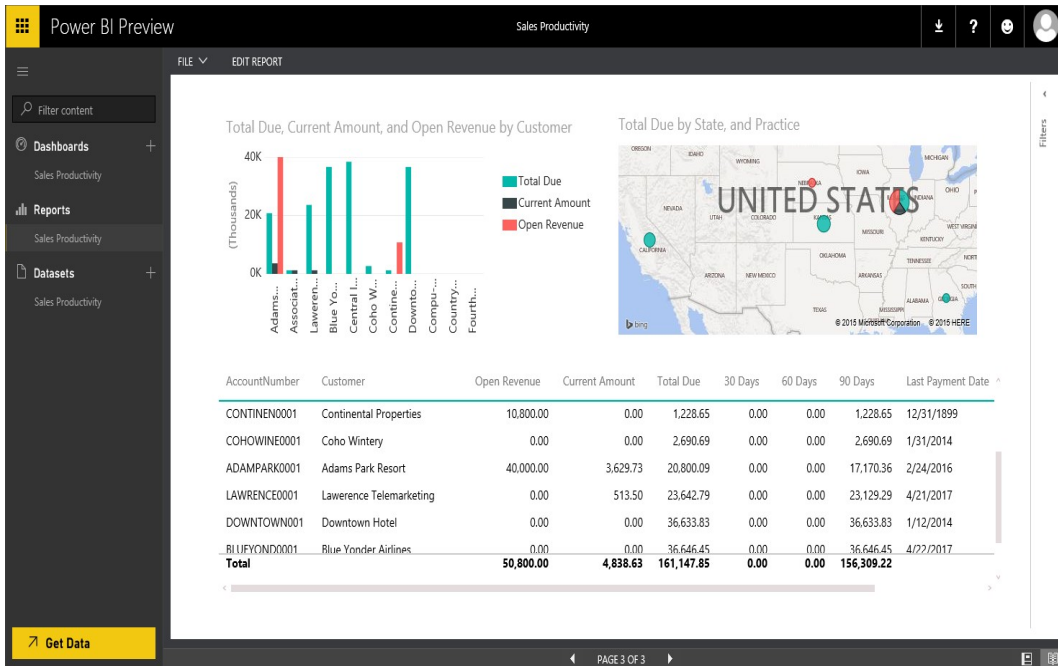
Cancel

# Chapter 7











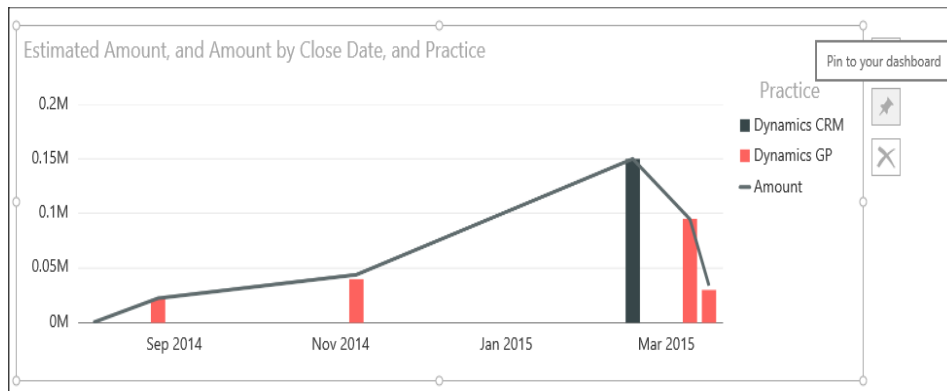
Fields

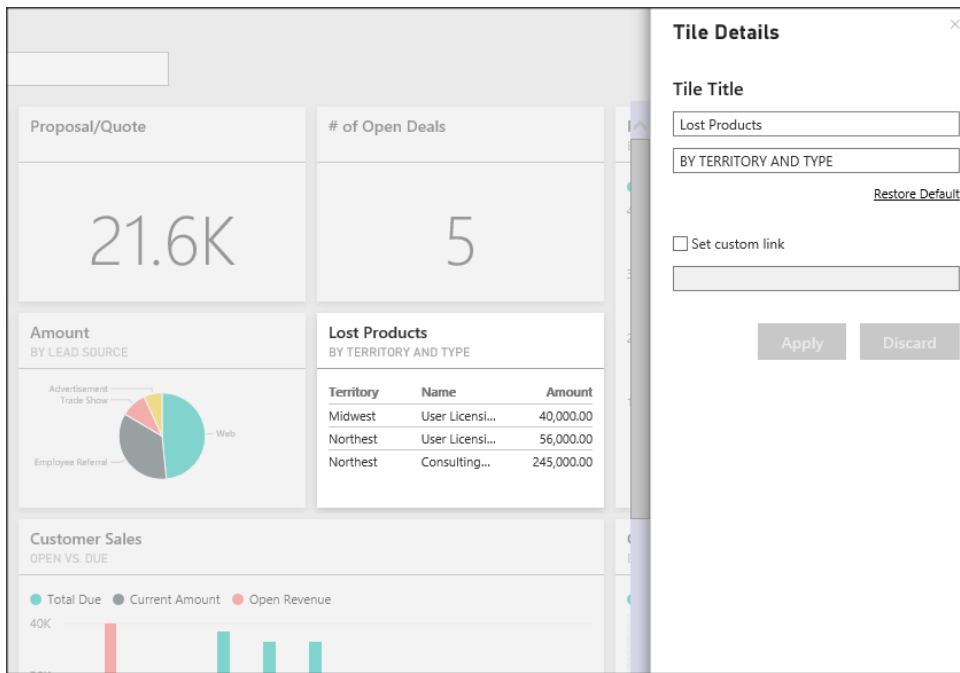
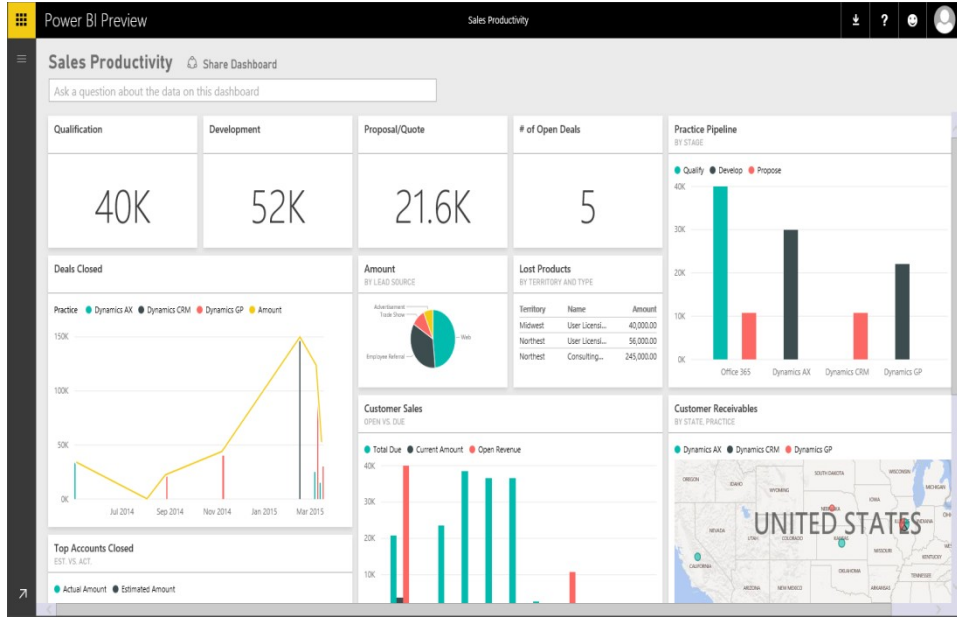
AccountNumber	▼	✕
Open Revenue	▼	✕
Σ Open Revenue	▼	✕
Σ Current Amount	▼	✕
Σ Total Due	▼	✕
Σ 30 Days	▼	✕
Σ 60 Days	▼	✕
Σ 90 Days	▼	✕
Last Payment Date	▼	✕
Σ Last Payment Amount	▼	✕

FILE ▾ SAVE

 **Save**  
Save this report.

 **Save As**  
Save a copy of this report.





**Datasets** +

- Dynamics CRM Sales Da...
- Sales Productivity** ...

### Sales Productivity

Last refresh succeeded : Tue May 05 2015 22:06:40 GMT-0400 (Eastern Daylight Time)

Refresh Schedule not enabled

EXPLORE RENAME SCHEDULE REFRESH REFRESH NOW DELETE

Settings

Datasets

- Dynamics CRM Sales Dashboard
- Sales Productivity

### Settings for Dynamics CRM Sales Dashboard

- Schedule Refresh**
  - Keep your data up to date
  - Yes
  - Refresh frequency: Daily
  - Refresh between: 6 AM - 12 PM
  - Time Zone: (UTC-05:00) Eastern Time (US and Canada)
- Manage Data Sources**
  - ODATA Edit

Apply Discard





Share Dashboard

Not shared with anyone

Invite

Shared With

Enter email addresses separated by ; or ,


Check out this dashboard I created to track our data.

Recipients will have access to the same data and reports as you have in this dashboard. [Learn more](#)

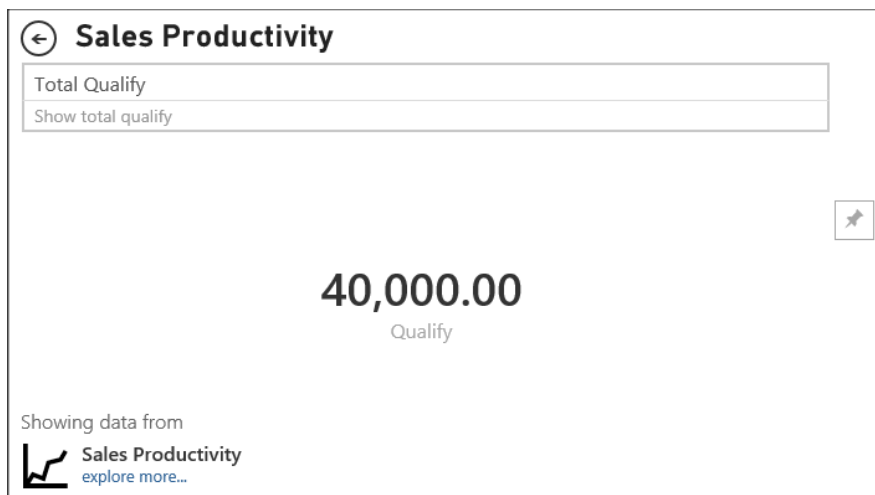
Share

Allow recipients to share your dashboard

## Chapter 8

**Sales Productivity**  Share Dashboard

Ask a question about the data on this dashboard



← **Sales Productivity**


Count of Opportunity Open

Show number of Open opportunities

5

Count of Opportunities

Showing data from

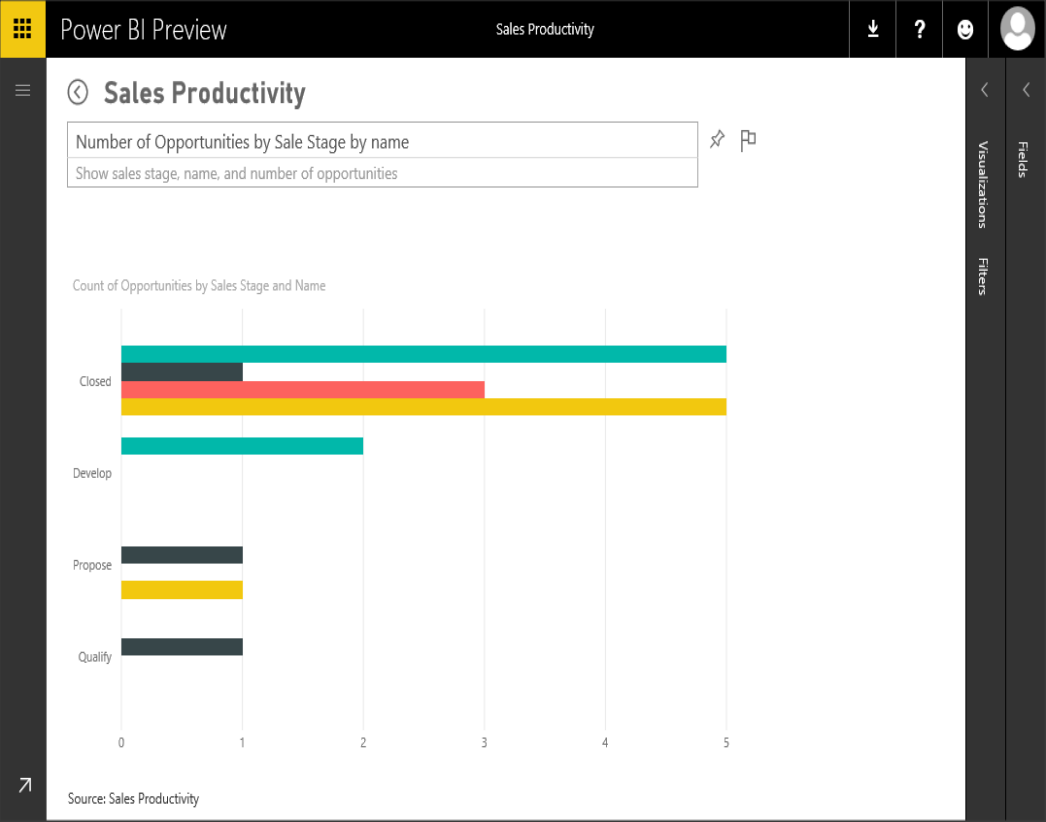
 **Sales Productivity**  
[explore more...](#)

← **Sales Productivity**

Lost Deals by Terrioty that are named User Licencing

Show lost deal by territory named User Licencing

Territory	Name	Amount	Customer
Midwest	User Licencing	40,000.00	Atlanta Tigers
Northeast	User Licencing	22,000.00	Disney Universe
Northeast	User Licencing	34,000.00	Redwood Waste



Power BI Preview Sales Productivity

customer aging

Show customer aging

Customer_Name	Customer_Terms	Customer_Class	Total_Due	Current	31_to_60_Days	61_to_90
Aaron Fitz Electrical	Net 30	USA-ILMO-T1	24272.06	6941.02	0	0
Adam Park Resort	Net 30	USA-INMI-T2	20800.09	3629.73	0	0
Advanced Paper Co.	Net 30	USA-ILMO-T1	327.08	0	0	0
Advanced Tech Satellite System	Net 30	CAN-ONMBSK-T6	4702.2	0	0	0
Alton Manufacturing	2% 10/Net 30	USA-INMI-T2	68955	0	0	0
American Electrical Contractor	Net 30	USA-IAKSNE-T3	7800.13	0	0	0
American Science Museum	Net 30	USA-ILMO-T1	25838.97	0	0	0
Associated Insurance Company	Net 30	USA-IAKSNE-T3	1093.04	695.4	0	0
Astor Suites	Net 30	USA-INMI-T2	1405.87	1405.87	0	0
Atmore Retirement Center	Net 30	USA-ILMO-T1	13104.14	0	0	0
Baker's Emporium Inc.	Net 30	USA-INMI-T2	9479.69	9479.69	0	0
Berry Medical Center	Net 30	USA-MNWI-T4	50797.1	0	0	0
Blue Yonder Airlines	Net 30	USA-IAKSNE-T3	36646.45	0	0	0
Boyle's Country Inn's	Net 30	AUSTRALIA-T8	17327.65	0	0	0
Breakthrough Telemarketing	Net 30	CAN-PQMT-T5	13151.65	0	0	0
Castle Inn Resort		CAN-ONMBSK-T6	30039.67	0	0	0
Cellular Express	Net 30	USA-ILMO-T1	16007.78	1405.87	0	0
Center Suite Hotel	Net 30	USA-MNWI-T4	-10218.93	0	0	0

Source: Sales Productivity

Pinned to Dashboard

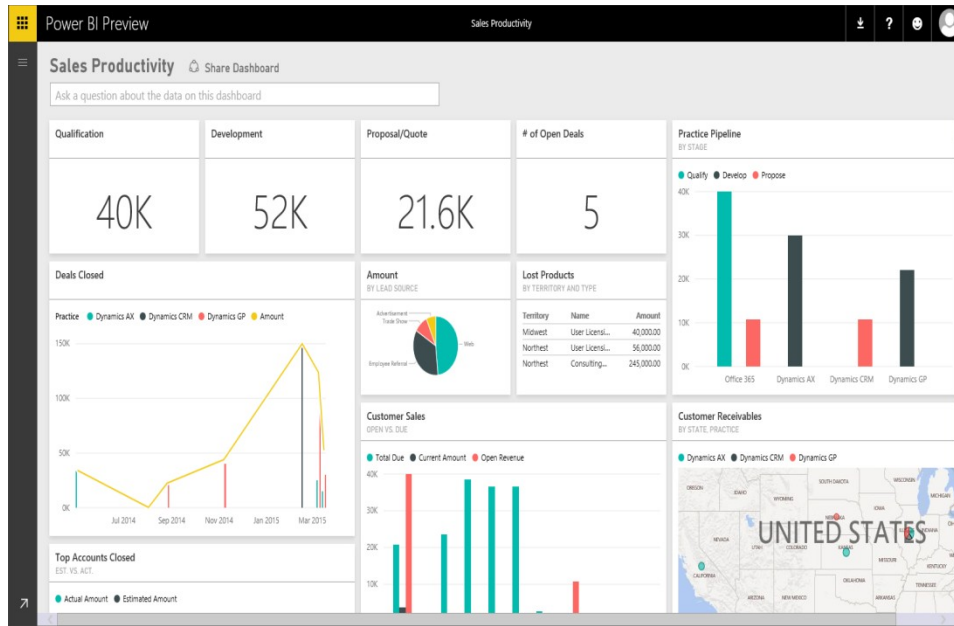
The visualization has been pinned to your dashboard.

Microsoft Power BI Preview

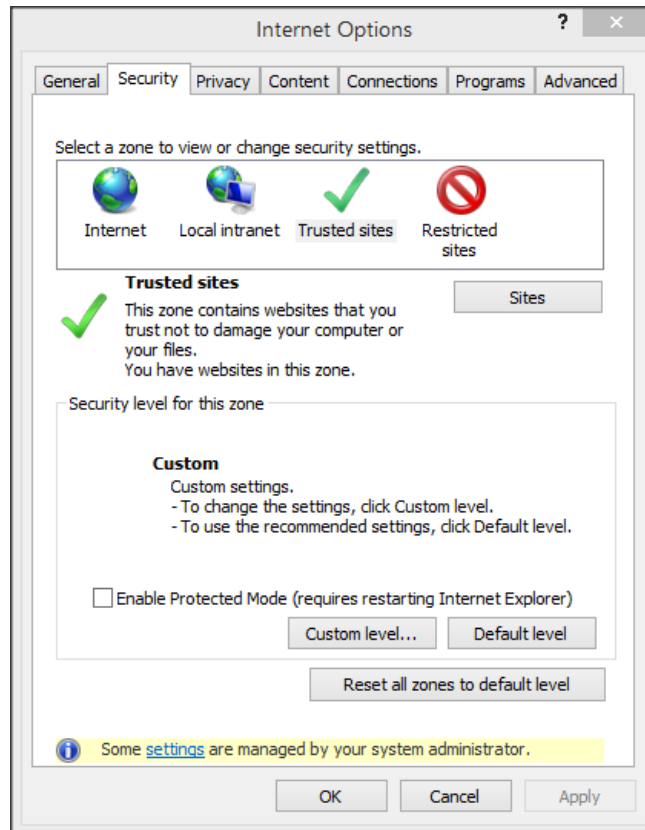
Sales Productivity Share Dashboard

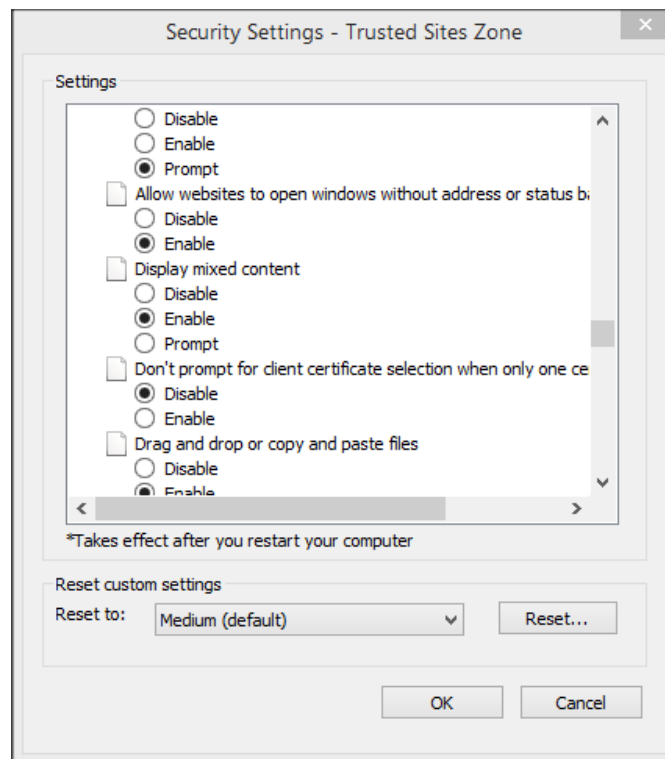
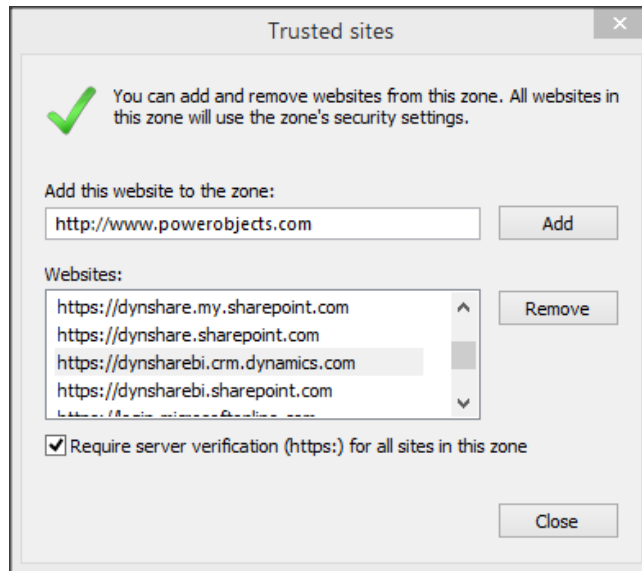
Ask a question about the data on this dashboard

Qualification	Development	Proposal/Quote	# of Open Deals
40K	52K	21.6K	5



## Chapter 9





Microsoft Dynamics CRM | SETTINGS | Solutions | Create | Steve Ivie Dynshare

All Solutions | Search for records

New | Delete | Import | Export | Import Translations | Export Translations | Publish All Customizations | Get Solutions from Marketplace | More Actions

Name	Display Name	Version	Installed On	Package Typ...	Publisher	Description
PowerBI	PowerBI	1.0	6/10/2015	Unmanaged	Default Publisher for dynsharebi	Power BI Embedded Dashboard
InsideView	Insights for Microsoft Dyn...	3.4	5/6/2015	Managed	InsideView, Inc.	Insights, powered by InsideView, makes it easier than ever...

1 - 2 of 2 (0 selected) | Page 1 | A-Z

File | Save and Close | Help

Solution: New Solution

### Information

**Solution New**

- Information
- Components
  - Entities
  - Option Sets
  - Client Extensions
  - Web Resources
  - Processes
  - Plug-in Assemblies
  - Sdk Message Processing S...
  - Service Endpoints
  - Dashboards
  - Reports
  - Connection Roles
  - Article Templates
  - Contract Templates
  - Email Templates
  - Mail Merge Templates
  - Security Roles
  - Field Security Profiles
  - Routing Rule Sets
  - Case Creation Rules
  - SLAs

**General**

Display Name \*  Name \*

Publisher \*  Configuration Page

Version \*

**Description**

**Installation Details**

Installed On  Package Type

**Marketplace**

The current solution does not have marketplace information associated with it.

Status: New

File Save and Close Export Solution Import Translations Export Translations Publish All Customizations Actions Help

Solution: Power BI

### Web Resources

**Solution Power BI**

Component Type: Web Resource View: Customizable

New Add Existing Delete Remove Publish Show Dependencies Add Required Components

Managed Properties More Actions

Display Name	Name	Type	Customizable	Description
Power BI Icon	new_/image/power_bi.png	PNG format	Unmanaged	True
Power BI Menu Webpage	new_/webpage/power_bi_menu.html	Webpage (HTML)	Unmanaged	True

1 - 2 of 2 (0 selected) Page 1

Status: Existing

SAVE DELETE PREVIEW SHOW DEPENDENCIES PUBLISH PUBLISH ALL CUSTOMIZA...

Solution: Power BI

### Web Resource: Power BI Menu Webpage

**General**

Name \*

Display Name

Description

**Content**

Type \*

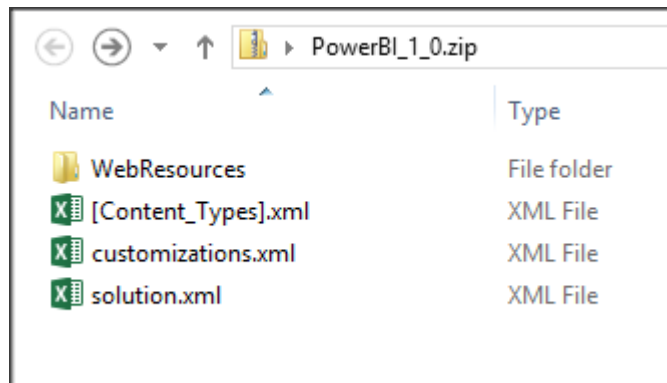
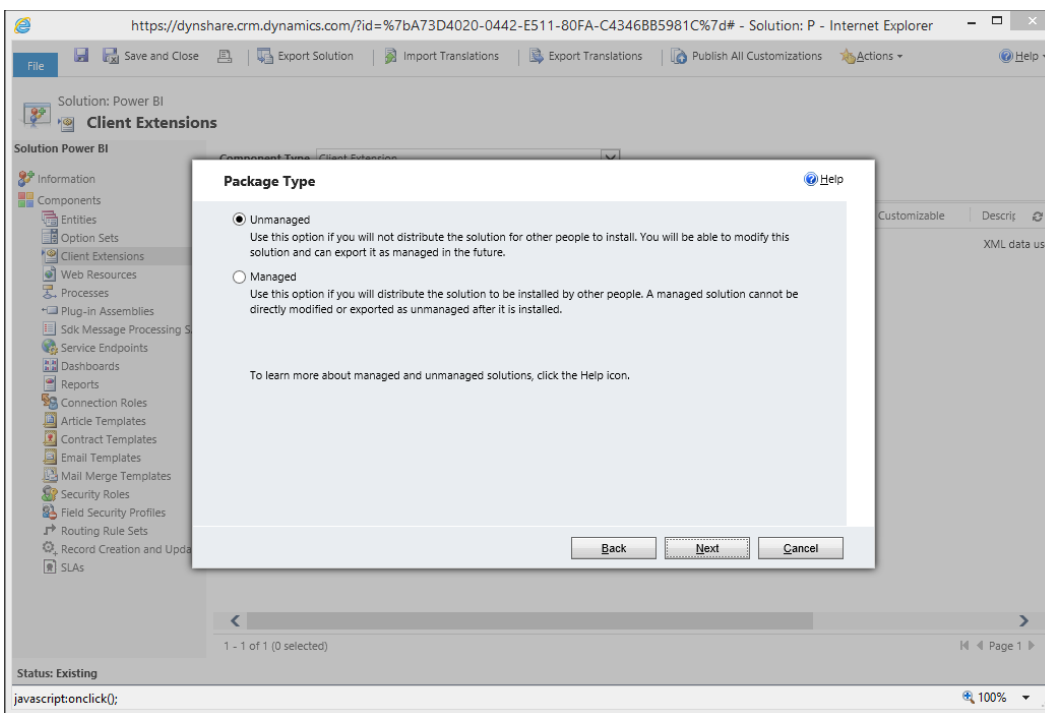
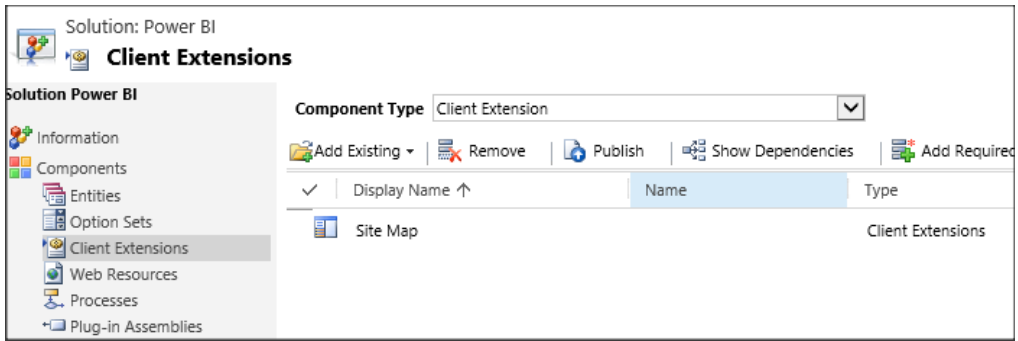
Language

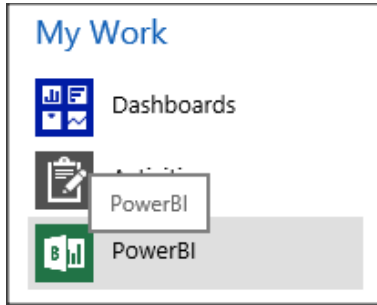
Upload File

**URL**

URL







Microsoft Dynamics CRM

Recruitment PowerBI

NEW ACTIVITY + NEW RECORD IMPORT DATA

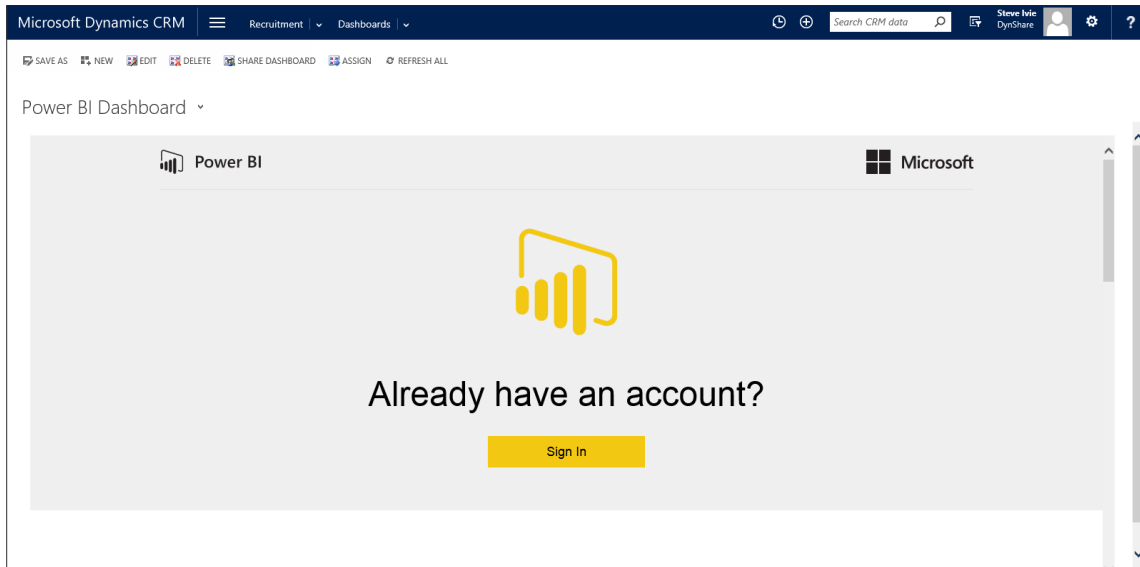
### Power BI Links

**Dashboards**

- Sales Productivity Dashboard

**Reports**

- Sales Productivity Reports



## Chapter 10

The landing page for Microsoft Power BI features a yellow header with the Power BI logo and navigation links for "Mobile", "Solutions", "Pricing", "Support", "Downloads", and a "Sign In" button. The main headline reads "Build reports and monitor your data from anywhere". Below this, there are three columns of content:

- FOR ANALYSTS: Microsoft Power BI Designer**  
With the Power BI Designer you can visually explore your data through a free-form drag-and-drop canvas, a broad range of modern data visualizations, and an easy-to-use report authoring experience.  
Download
- FOR MOBILE WARRIORS: Microsoft Power BI app for Windows and iOS**  
Access your data anywhere, anytime. These native Windows and iOS apps provide live, interactive, mobile access to your important business information.  
Download from Windows store  
Download from App store
- FOR BI PROFESSIONALS: Microsoft Power BI Analysis Services Connector**  
Connect to on-premise data in SQL Server Analysis Services without moving your data to the cloud. Schedule the data in your reports to refresh from on-premise data sources.  
Download

A "Contact us!" button is located in the bottom right corner.

Home Top charts Categories Collections Account Search for apps

## Microsoft Power BI Preview

**Free** ★★★★★ 15

When you install an app, you agree to the [Terms of Use](#) and any [additional terms](#).

This app has [permission](#) to use some features of your PC that might affect your privacy.

**Description**


Microsoft Power BI app enables you to monitor and access your business data anywhere, anytime. Easily view and interact with your Power BI dashboards and reports, share them with your colleagues and discover insights in just minutes.

- Stay up-to-date and unlock insights as they happen.
- Explore and present your data in new ways with bold interactive charts, maps, and graphs.
- Invite your colleagues to view dashboards.
- Share dashboards and reports snapshot by email.
- Add annotation to mark and explain the important data you want to stress out.

Version 1.2.50504.1274

**Features**

- Access your data using Power BI dashboards and reports - anywhere, anytime.
- Collaborate with colleagues over insights by sharing snapshots, dashboards and reports.
- Add annotations to your dashboards when presenting or sharing data.
- Explore your data by filtering, sorting and highlighting your live reports.



**Bring your data to life**

Monitor your business, explore your data and collaborate with your colleagues anywhere, anytime.

Published by Microsoft Corporation  
© 2015 Microsoft Corporation. All rights reserved.

Category Business  
Approximate size 5.81 MB  
Age rating 12+

**Ratings and reviews**

**4.7** average rating

★★★★★

15 ratings

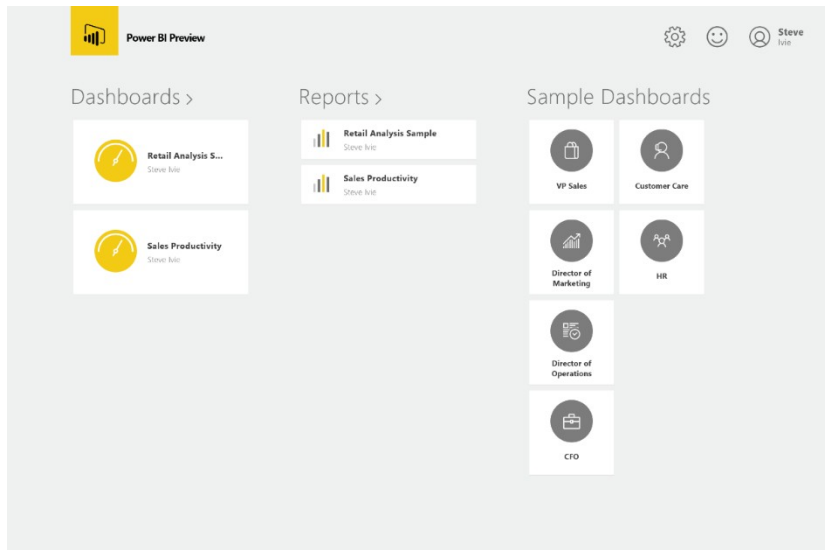
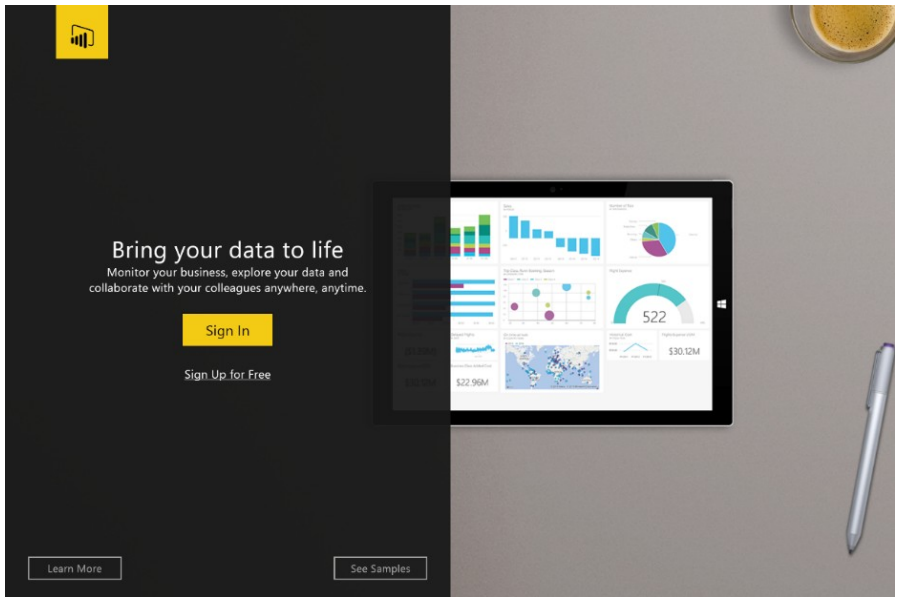
5 stars	13
4 stars	0
3 stars	1
2 stars	1
1 star	0

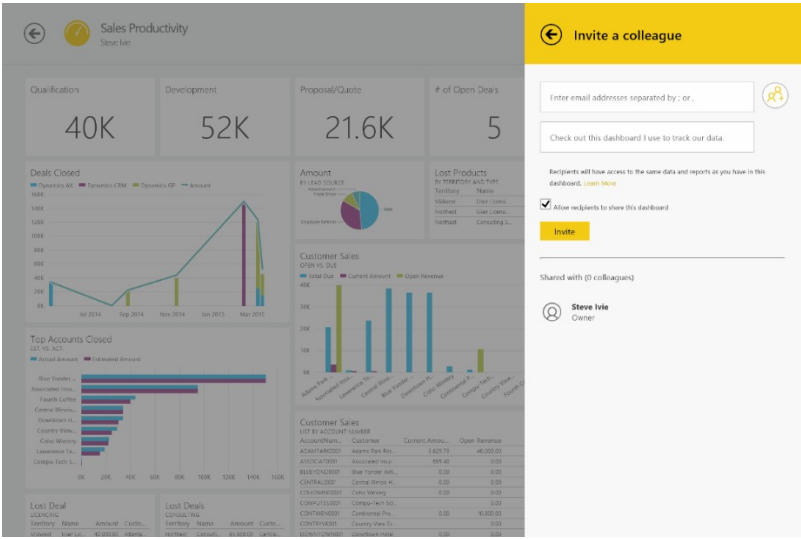
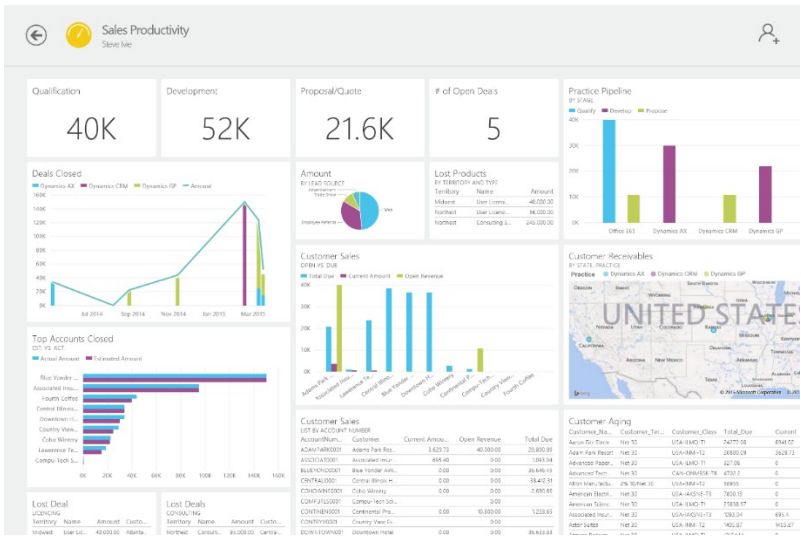
0 total reviews

No one has reviewed this app

## Apps by name

<b>&amp;</b>	Brevets - Premium SharePoint...	Documents	<b>L</b>	LinkedIn HD	<b>P</b>	PC settings	Social App Suite
<b>A</b>	Adobe Reader Touch	Dropbox	<b>L</b>	Lync	<b>P</b>	People	Sound Recorder
	Adobe Reader XI	<b>F</b>	<b>M</b>	Mail	<b>P</b>	Photos	Sports
	Alarms	Facebook	<b>M</b>	Maps	<b>P</b>	Pictures	Spotify - Listen to Spotify
<b>C</b>	Calculator	Food & Drink	<b>M</b>	Microsoft Dynamics CRM	<b>P</b>	Power BI Preview	Steve Nilo - Outlook Web Ap
	Calculator Free	<b>G</b>	<b>M</b>	Microsoft Dynamics CRM	<b>R</b>	Reader	Store
	Calendar	Games	<b>M</b>	Microsoft Dynamics Learning Po...	<b>R</b>	Reading List	Stuff
	Camera	Help+Tips	<b>M</b>	Microsoft Power BI	<b>R</b>	Remote Desktop	Twitter
	CBS Sports	HERE Maps	<b>N</b>	News	<b>R</b>	Retrieve Application	Virtual Wallet
	Cmix Receiver	HP AIO Printer Remote	<b>N</b>	OneDrive	<b>S</b>	Scan	Weather
<b>D</b>	Desktop	<b>I</b>	<b>O</b>	OneNote	<b>S</b>	sharingdynamics	Xbox 360 SmartGlass
	Desktop Clock	Internet Explorer	<b>O</b>	OneNote	<b>S</b>	Skype	
		<b>K</b>	<b>O</b>	OneNote	<b>S</b>	Skype WiFi	
		Kindle					





**Invite a colleague**

Enter email addresses separated by ; or ,

Check out this dashboard I use to track our data

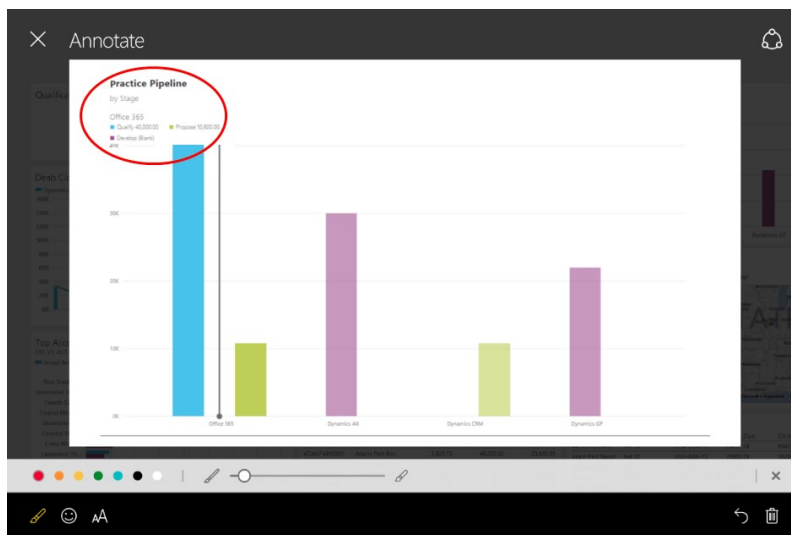
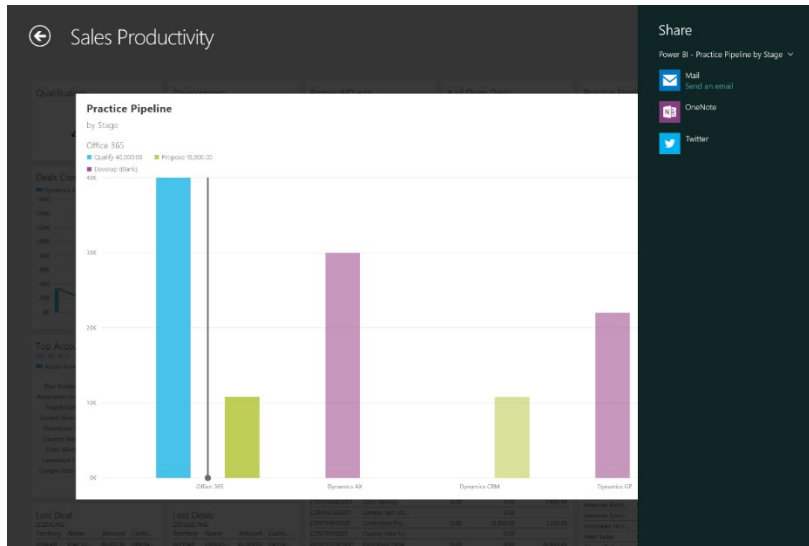
Participants will have access to the same data and reports as you have in this dashboard. [Learn More](#)

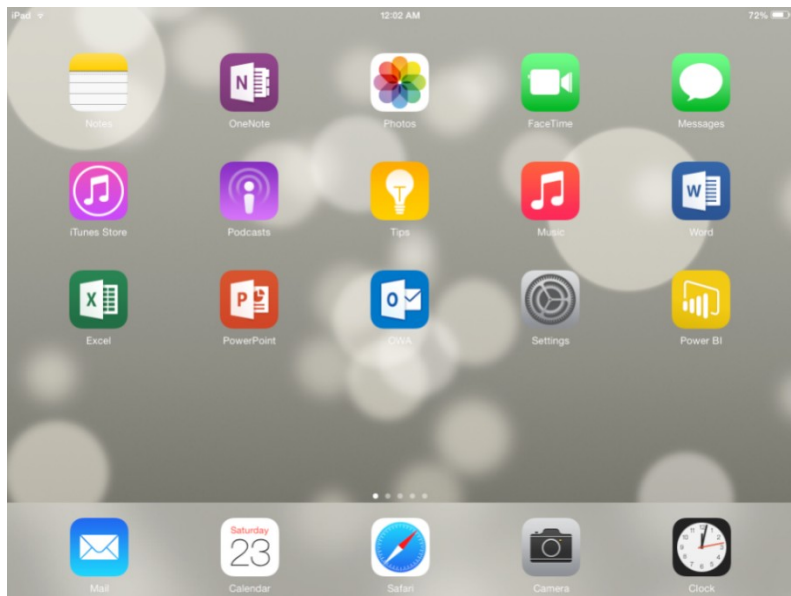
Allow recipients to share this dashboard

**Invite**

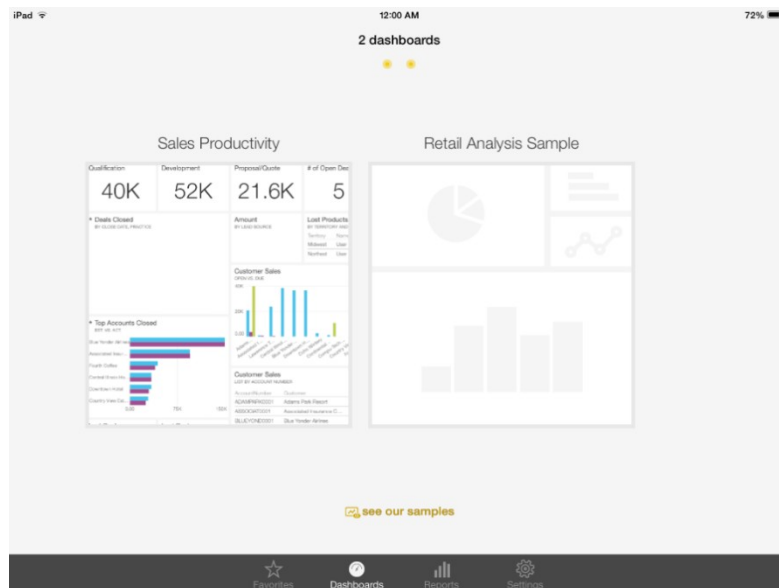
Shared with (0) colleagues

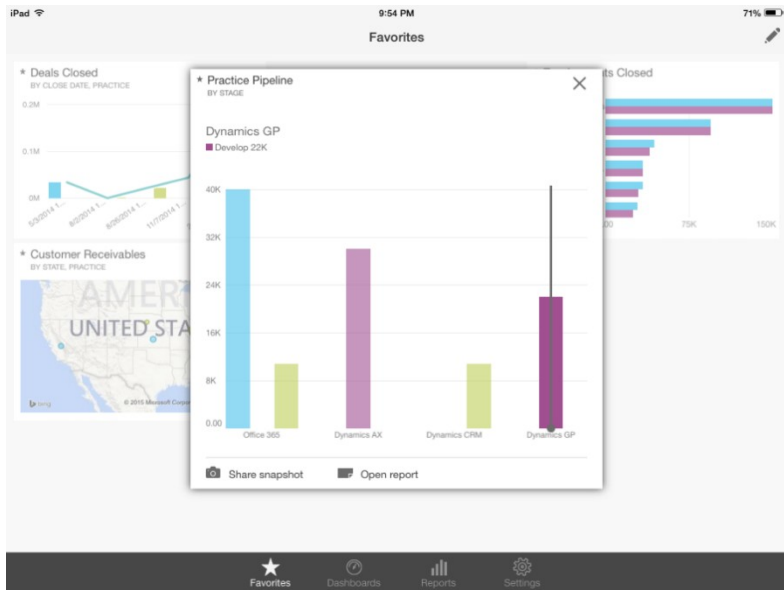
**Steve Irie**  
Owner

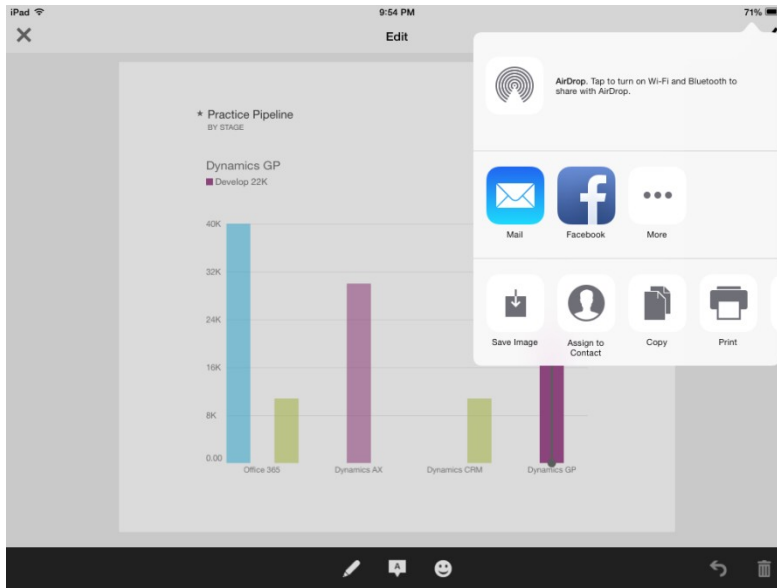












## Chapter 11

# Get Data

Need more guidance? [Try this tutorial](#)

### Content Pack Library

#### My Organization

Browse content packs that other people in your organization have published.

**Get** ↗

#### Services

Choose content packs from online services that you use.

**Get** ↗

### Import or Connect to Data

#### Files

Bring in your reports, workbooks, or data from Excel, Power BI Desktop or CSV files.

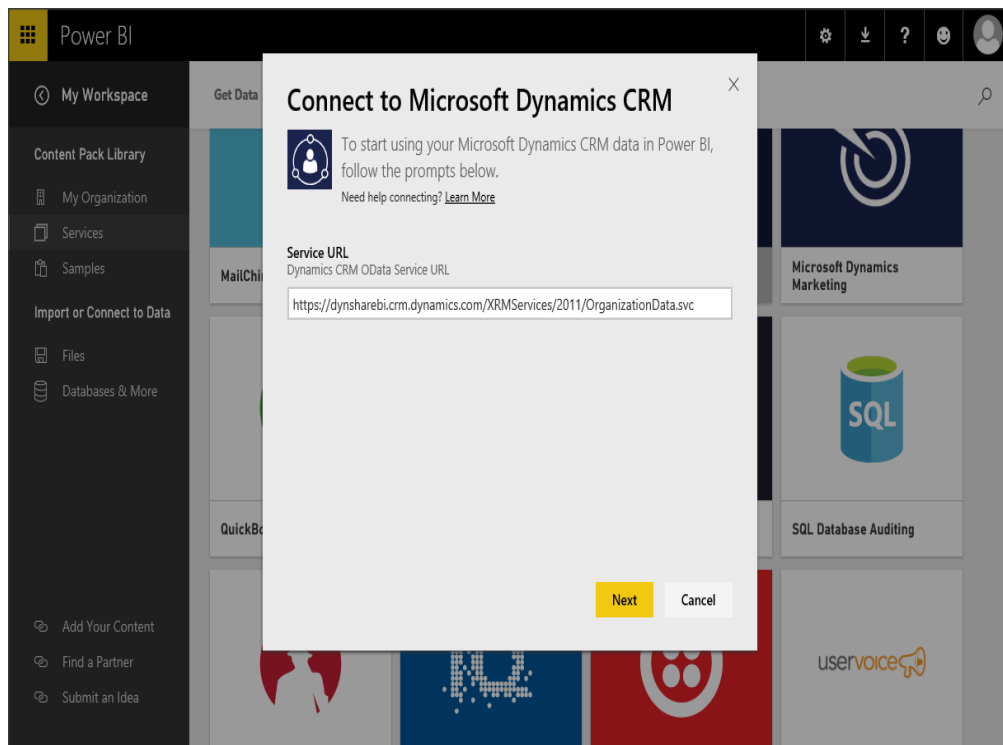
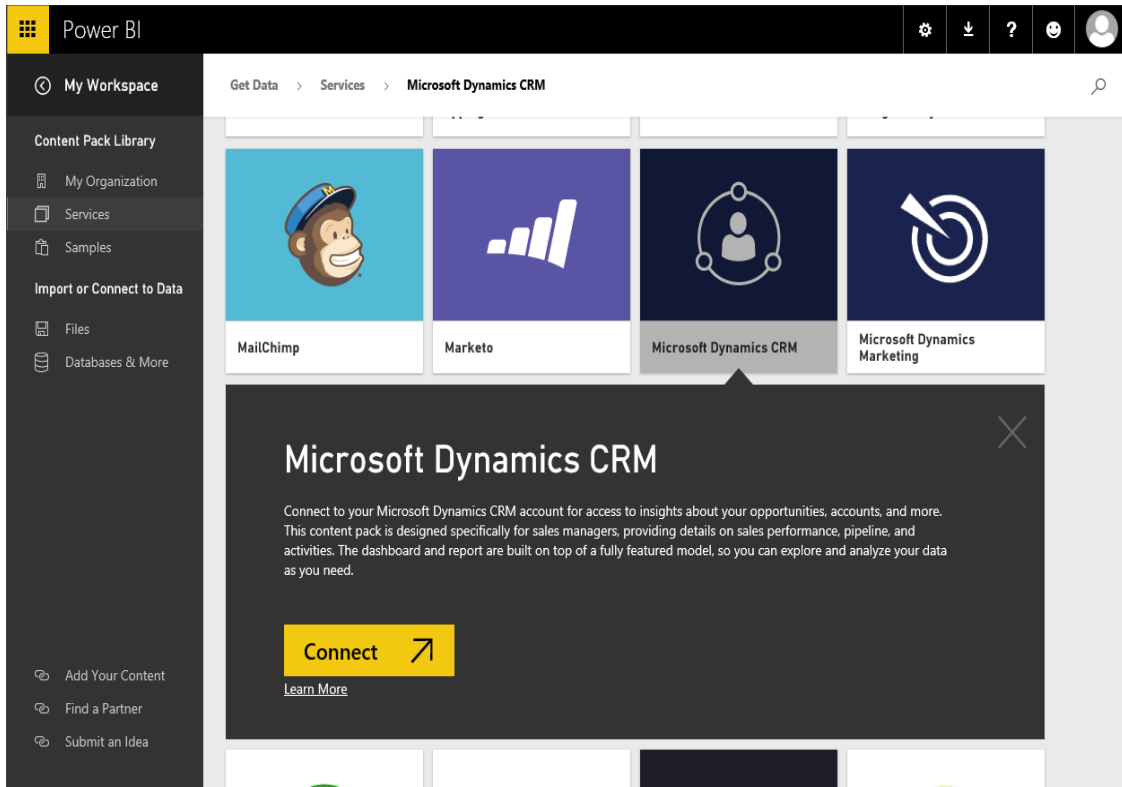
**Get** ↗

#### Databases

Connect to live data in Azure SQL Database and more.

**Get** ↗

[Samples](#)



## Connect to Microsoft Dynamics CRM



To start using your Microsoft Dynamics CRM data in Power BI, follow the prompts below.

Need help connecting? [Learn More](#)

Url

Authentication Method:

OAuth2



Sign In

Cancel

