

# Dynamics 365 Customer Engagement **Power BI** enablement

Get the sales and customer service reporting you need without the limitations of Dynamics 365 licencing and dashboard limits. Understand what Power BI can offer and how it fits with your specific business requirements.

Power BI, Microsoft's powerful business intelligence platform, allows organisations to unify self-service and enterprise analytics and meet self-service and enterprise data analytics needs on a single platform. Microsoft Dynamics CE Power BI content packs are a good starting point to get you going. Get your reports embedded inside Dynamics 365 CE for the registered users to have reports that bypass the dashboard limitations in Dynamics.

In addition; Combine data from across your organisation and surface dashboards and insights to the wider organisation via mobile devices and their browser without requiring Dynamics licences – as well as to customers through your customer portal should you so desire.

### Get self-service analytics at enterprise scale

Reduce the added cost, complexity, and security risks of multiple solutions with an analytics platform that scales from individuals to the organisation.

### Use smart tools for strong results

Find and share meaningful insights with hundreds of data visualisations, built-in AI capabilities, tight Excel integration, and prebuilt and custom data connectors.

### Help protect your analytics data

Gain leading sensitivity classification and data loss prevention capabilities to help keep your data secure and compliant—even when it's exported.

With Power BI for Dynamics CE, you can get real time insights from your Microsoft Dynamics CRM data. Visualise your opportunities with Power BI by identifying opportunities on a single dashboard and analyse your pipeline or view your sales across a variety of metrics to gain actionable insights.

Gain insights into your customers with out-of-the-box workbooks that provide visuals on key metrics such as customer engagement, enabling you to better understand case analysis by type, priority and geography as well as analyse service performance on number of cases, resolution rate, level of priority and more.

Finally, dive deep into your data and drill down into each top-level chart to understand specifics of metrics such as account, leads, revenue and service. Customise these reports to get the information you need.

To help with this, Fusion5 offers a Power BI readiness assessment for Dynamics 365 CE clients, which includes:

- Facilitation to activate all Microsoft standard Power BI content packs for Dynamics CE in the customer's environment if not active already
- Evaluation of client's Power BI knowledge and experience
- Facilitation of a workshop to understand the reporting requirements and identify gaps between standard content packs and the reporting needs
- Explanation of licensing options for Power BI in relation to complexity of requirements and gaps between requirements and standard content packs
- Basic Power BI usage training
- Optional 2 days of report customisation

**For more information on the Fusion5 Power BI readiness assessment for Dynamics 365 Customer Engagement, or to see if this solution is right for you, please contact us.**

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