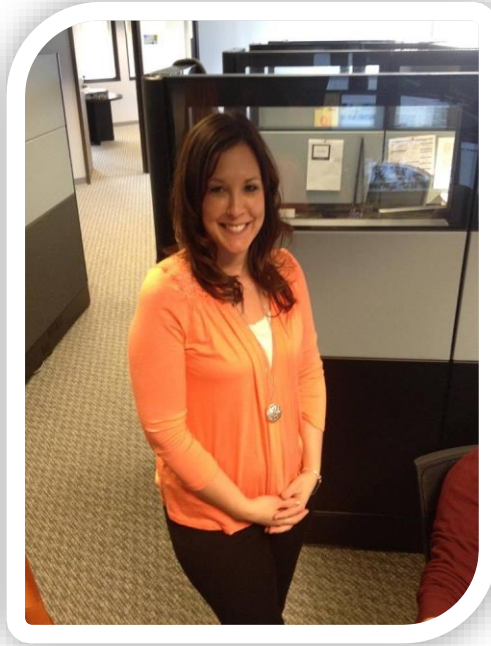




Ledgeview's Microsoft Dynamics CRM User Group

Host-Kristina Felchlin



Kristina Felchlin

Support Manager

920-560-3079

Kfelchlin@Ledgeviewpartners.com

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Support Consultant Team

Contact Information:

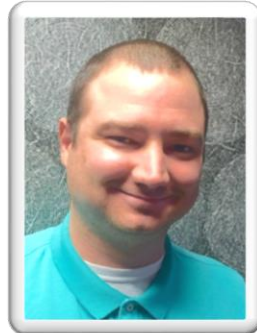
Phone: 920-560-6888

Email: CRMSupport@Ledgeviewpartners.com

Michael Dodds



Tyler Felton



Taylor Nassen



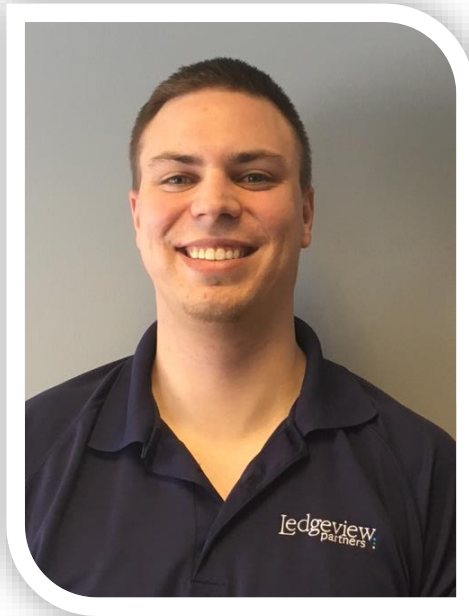
Josh Philipps



Agenda

- Reports
 - What is the Best Method to Retrieve or View Data
 - Pros, Cons and Limitations of the Report Wizard
 - Demos
 - Report Examples
 - Known Issue with Reports
- User Questions
- Upcoming Webinars

Presenter-Michael Dodds



Michael Dodds

Support Consultant

920-560-6888

CRMSupport@Ledgeviewpartners.com

Methods to Retrieving CRM Data

Method	When to Use	When not to Use
Advanced Find	<ul style="list-style-type: none"> One time Data Set 	<ul style="list-style-type: none"> Dynamic Data Set Need to see the data frequently
View	<ul style="list-style-type: none"> Dynamic Data Set Review Data Set frequently 	<ul style="list-style-type: none"> One time data pull A set data period
Dashboard	<ul style="list-style-type: none"> View items graphically Combine like Data Sets Comparison Charts 	<ul style="list-style-type: none"> Combining unrelated items Analysis required
Reports (Report Wizard)	<ul style="list-style-type: none"> Data in set Groupings Numeric Values with Summation Charts and Data together 	<ul style="list-style-type: none"> Highly customized Reports/charts Unique Logic that requires customization
Custom Reports	<ul style="list-style-type: none"> Report to distribute, Report is appealing Comparison with Calculated Field Filtering after the Report is Generated Customized Charts Columns not related to the data Related records with no data 	<ul style="list-style-type: none"> Custom report or Advanced Find will generate the needed information

Report Wizard

Pros

- Grouping Ability
- Summing Ability
- Ease of Use
- More Appealing Format than Advanced Find
- Exporting Ability to a PDF, Word, etc.
- Add Basic Charts
- Can Open Records

Cons

- Limited Customizations
- Cannot Achieve Complex Requirements
- Limited to Basic Logic
- Cannot Filter Reports After Generation
- Cannot add Hyperlinks

Limitations

- Look up Functionality
- Utilizing Sub Reports
- Setting Parameters
- Page #'s in Footer
- Access the Current Date and Time

Reports - Filtering

Report Viewer: demo 2 - Internet Explorer

File

Report Filtering Criteria

Accounts

Clear | Group AND | Group OR

Industry Equals Consulting;Business Services...
[Select](#)

Opportunities (Account)
 Created On Last X Months 1
[Select](#)

Leads
 Lead Source Equals Trade Show
[Select](#)

Opportunities

Clear | Group AND | Group OR

[Select](#)

Reports - Demo

- Marketing Manager would like to capture the following information in a Report
 - The number of Accounts generated from the Direct Marketing Campaign
 - The Amount of Revenue generated from the Opportunities with a Source Campaign of Direct Marketing
 - Group the report by Account
 - Sum the Actual Revenue
 - Add the following Columns
 - Sales Rep
 - Opportunity Topic
 - Actual Close Date
 - Actual Revenue

Reports – Demo 2

- Sales Manager would like to capture the following information in a Report
 - Accounts with Opportunities scheduled to close in the next month
 - The Amount of Revenue to be generated from the Opportunities closing in the next month
 - Group the report by Sales Rep
 - Sum the Estimated Revenue
 - Information shown graphically and in a table
 - Would like the following Columns
 - Account Name
 - Opportunity Topic
 - Estimated Close Date
 - Estimated Revenue

Reports – Other Examples

- Accounts in a specific Industry with Opportunities created in the last month from a specific Lead Source
 - Group by Industry and then by Owner
 - Account Name
 - Actual Revenue with Sums
 - Actual Close Date
 - Pie Chart and Table
- Opportunities created in the last 8 months that have not closed and are still in the Develop or Qualify Stage
 - Group by Owner
 - Account Name
 - Opportunity Topic
 - Estimated Close Date
 - Revenue Estimation with Sums
- Opportunities past due
 - Group by owner
 - Account Name
 - Opportunity Topic
 - Sort table by Est Close Date in Descending order
 - Estimate Revenue with Sums
 - Chart form with ability to drill down

Known Issue with Reports

- When exporting to Excel the values will sometimes appear as “#VALUE”
- Notify the Support Team at Ledgeview Partners
- Microsoft is aware of this issue

Question From a User

“How do you customize reports where the user can enter information to produce a report?”

- There are two ways to customize a report
 - Report Wizard which is limited
 - Custom Report Modifications
- Any report, including reports where the user inputs information in the filter, can be customized

Question From a User

“How can I create a dynamic variable in my reports? For example, I want to have a report that uses the run date to calculate a time span, from 1-5 months in the future.”

- By utilizing the filters you can set future look for dates
 - For example look for Opportunities scheduled to close in the next 5 months
- By setting the filter you are looking at that set future timeframe from the run date of your report

Question From a User

“How do I enable FantasySalesTeam for Microsoft Dynamics CRM Online?”

- Navigate to portal.office.com and login as the Admin
- Click on Admin
- Click on CRM
- Click on the icon next to Solutions
- Click on FantasySalesTeam
- Click Install
- Navigate to Solutions in CRM
- Click on the Display Name “FantasySalesTeam” in CRM
- Register your Account
- Authenticate your Account
- Click the link in the email you receive
- Set up Password
- Access the FantasySalesTeam App in you CRM through the Navigation Function

CRM Online Administration Center

INSTANCES | UPDATES

← Manage your solutions

Select a preferred solution to manage on selected instance: **LVP**

SOLUTION NAME	VERSION	AVAILABLE UNTIL	STATUS
Insights for Microsoft Dyn...	3.4	1/1/2050	Not installed
Voice of the Customer	8.0.301.2	1/1/2050	Not installed
Office 365 Groups	2.0.0.4	1/1/2050	Not installed
FantasySalesTeam	1.1	1/1/2050	Not installed
FieldOne Sky	5.1.5031.0	1/1/2050	Not installed

FantasySalesTeam



INSTALL
FST Preview for Dynamics CRM 7.1+

Created by: Microsoft
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Report Resources

Report Wizard

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/create-edit-or-copy-a-report-using-the-report-wizard.aspx>

Customize and Organize Reports

<https://www.microsoft.com/en-us/dynamics/crm-customer-center/customize-and-organize-reports.aspx>

CRM Resources

- Ledgeview Partners Blog

<http://ledgeviewpartners.com/blog/>

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Upcoming Webinars



Dynamics CRM: A Spotlight on Service:

Thursday, February 18th, 11:30-12pm CDT

Gaining CRM User Adoption: A 27 Point Inspection

Wednesday, March 2nd, 11-11:45am CDT

Harnessing The Power of Your Marketing Automation System

Thursday, March 10th, 11-11:30am CDT

Ledgeview's CRM User Group:

Tuesday, March 15th, 11:30-12pm CDT

Topic: Marketing List/Email Templates/Campaign Events and Event Participation