



# POWER TIME CORPORATION

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## Reporting with Microsoft Dynamics CRM

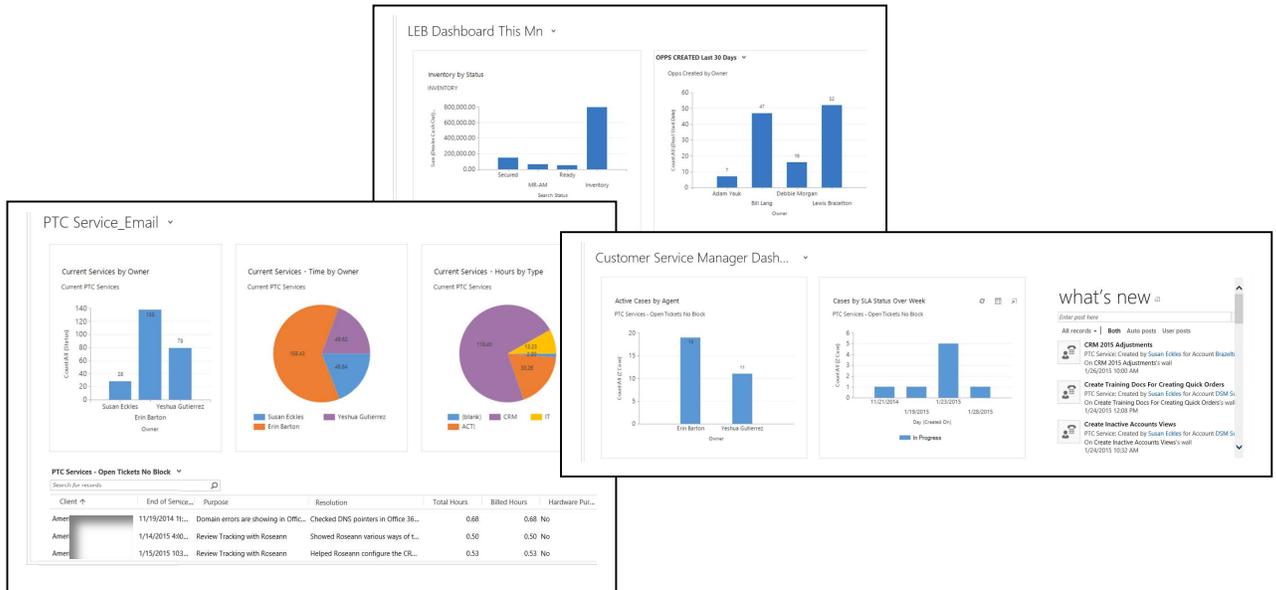
Microsoft Dynamics CRM offers almost unlimited capabilities for reporting and several methods by which your data can be reported. The key options are:

- Dashboards**
- Views and Advanced Finds**
- Excel Exports**
- Built-in Reports**
- Custom Reports**

We will examine each of these with some samples.

### Dashboards:

Dashboards are everyone’s favorite tools. They combine lists, charts, and Web information, pulling information from all parts of CRM into one convenient spot. There are many built-in dashboards, and you can create personal, team, or organization dashboards to show information relevant to a group or individual. There is no limit to the number of dashboards that you can have in your system. Here are some examples:



Whether you want consolidated summaries for management, call lists for sales reps, or service management reports, dashboards are a great way to keep up with what’s happening or needs to be done.

### Views and Advanced Finds:

Views are permanent queries of a specified area in CRM showing fields that you specify.

An Advanced Find is a query created “on the fly” that you may use and discard or save as a personal view, share with other specified CRM users, or convert to a system-wide permanent view.

Views and Advanced Finds may be simple one line requirements (All Accounts in Texas) or may have complex requirements (All existing customers who spent more than \$100,000 with us in 2015 and have centralized corporate purchasing).

## Creating an Advanced Find or View:

Microsoft Dynamics CRM  
Susan Eckles  
Power Time Corporation

**FILE** ADVANCED FIND

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML

Show View Query Debug

Look for: PTC Services Use Saved View: My Open PTC Services

Owner Equals Current User  
Status Equals Active  
Stage Does Not Equal Completed;Invoiced

## Sample Advanced Find Results:

Microsoft Dynamics CRM  
Susan Eckles  
Power Time Corporation

PTC SERVICES

Client	Stage	Priority	Purpose	Start of Service	End of Service	Total Hours	Billed Hours	Owner
Br...	Completed	3 Normal	CRM 2015 Adjustments	1/26/2015 9:00...	1/26/2015 10:00...	1.00	1.00	Susan Eckles
DS	Completed	3 Normal	Create Training Docs For Creating Q...	1/24/2015 11:00...	1/24/2015 12:00...	1.00	1.00	Susan Eckles
DS	Completed	3 Normal	Create Inactive Accounts Views	1/24/2015 12:00...	1/24/2015 12:30...	0.50	0.50	Susan Eckles
DS	Completed	3 Normal	Call with Scott	1/23/2015 1:00...	1/23/2015 1:10...	0.17	0.17	Susan Eckles
DS	Completed	3 Normal	Total Spent Update	1/23/2015 9:00...	1/23/2015 10:00...	1.00	1.00	Susan Eckles
DS	Completed	3 Normal	Phone Call Dashboard	1/23/2015 7:00...	1/23/2015 8:00...	1.00	1.00	Susan Eckles
DS	Completed	3 Normal	TM Import/Update - Cont'd	1/22/2015 8:30...	1/22/2015 9:30...	1.00	1.00	Susan Eckles
DS	Completed	3 Normal	TM Import/Update - Cont'd	1/21/2015 11:00...	1/21/2015 12:30...	1.50	1.50	Susan Eckles
DS	Completed	3 Normal	TM Import/Update - Cont'd	1/21/2015 10:00...	1/21/2015 11:00...	1.00	1.00	Susan Eckles
DS	Completed	3 Normal	TM Import/Update - Cont'd	1/21/2015 4:15...	1/21/2015 6:00...	1.75	1.75	Susan Eckles
DS	Completed	3 Normal	TM Import/Update	1/20/2015 7:00...	1/20/2015 7:45...	0.75	0.75	Susan Eckles
IBP	Pl...	3 Normal	Import Salary Updates for Wedgewo...	1/14/2015 5:30...	1/14/2015 7:30...	2.00	2.00	Susan Eckles
DS	Completed	3 Normal	Quick Order Instructions	1/13/2015 11:30...	1/14/2015 1:30...	2.00	1.00	Susan Eckles
DS	Completed	3 Normal	Prep and meeting with Scott re Orde...	1/13/2015 10:30...	1/13/2015 2:30...	4.00	4.00	Susan Eckles
DS	Completed	3 Normal	Configure CTI On Sales 09	1/8/2015 1:30 PM	1/8/2015 2:00 PM	0.50	0.50	Susan Eckles
Ser	Completed	3 Normal	Develop Report of Findings	1/2/2015 1:05 PM	1/2/2015 4:05 PM	3.00	3.00	Susan Eckles
Ser	Completed	3 Normal	Meeting with	12/18/2014 1:00...	12/18/2014 1:30...	0.50	0.50	Susan Eckles

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## Sample View:

PTC Services - Open Tickets No B... Search for records

Client	End of Service	Purpose	Resolution	Total Hours	Billed Hours	Hardware Purch...	Hardware	Misc Purchase
Am...	11/19/2014 11:5...	Domain errors are showing in Office3...	Checked DNS pointers in Office 365...	0.68	0.68	No	No	No
Am...	1/14/2015 4:00...	Review Tracking with Roseann	Showed Roseann various ways of tra...	0.50	0.50	No	No	No
Am...	1/15/2015 10:32...	Review Tracking with Roseann	Helped Roseann configure the CRM...	0.53	0.53	No	No	No
C &	11/18/2014 10:0...	Larry unable to send or receive email...	Ran test account settings in Outlook...	0.42	0.42	No	No	No
Diar	1/5/2015 8:30 PM	Not able to print and Adobe Acrobat...	Reactivated Adobe Acrobat by enter...	0.50	0.50	No	No	No
Diar	1/13/2015 11:05...	Diane wants to get rid of menu in Ad...	Logmein- Showed Diane how to clos...	0.08	0.08	No	No	No
EnV	12/29/2014 12:3...	Test redesigning the Billing report	After working with Microsoft on a si...	1.00	0.00	No	No	No
EnV	12/29/2014 4:00...	Test redesigning the Billing report	Finished redesigning. Ran into an iss...	2.00	0.00	No	No	No
EnV	1/7/2015 1:35 PM	Tom is not able to access shared driv...	Tom called wanting to know his pass...	0.08	0.08	No	No	No
EnV	1/7/2015 3:53 PM	Tom is not able to access shared driv...	Started a gotomeeting and Sandra w...	0.83	0.83	No	No	No
EnV	1/14/2015 11:00...	Test redesigning the Billing report	Tech Support sent over an example o...	0.75	0.00	No	No	No
EnV	1/15/2015 3:00...	Test redesigning the Billing report	Tech called and we went through the...	0.33	0.00	No	No	No
JimS	1/8/2015 4:25 PM	Test display settings	Jim's display is off in ACTI. All of the f...	1.00	1.00	No	No	No
Katy	1/27/2015 11:50...	Transfer of X-Rays are timing out	Spoke with Mike with Alta Vista Radi...	0.50	0.50	No	No	No
Nels	1/15/2015 11:20...	Look into ACTI access issue	Dean's having periodic trouble conn...	0.33	0.33	No	No	No
Nels	1/22/2015 12:00...	Check Excel Quote Invoice Maker set...	Call with Tanya to look at her addon...	0.50	0.50	No	No	No

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## Excel Exports:

Any View or Advanced Find may be exported to Excel as a static worksheet, a dynamic pivot table (automatically updated with new data from CRM any time the pivot table is opened), or a dynamic worksheet. Once exported, you may adjust the worksheet as you wish.

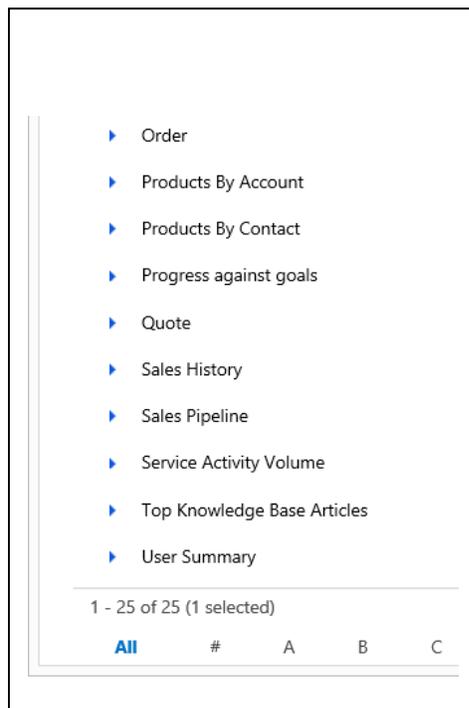
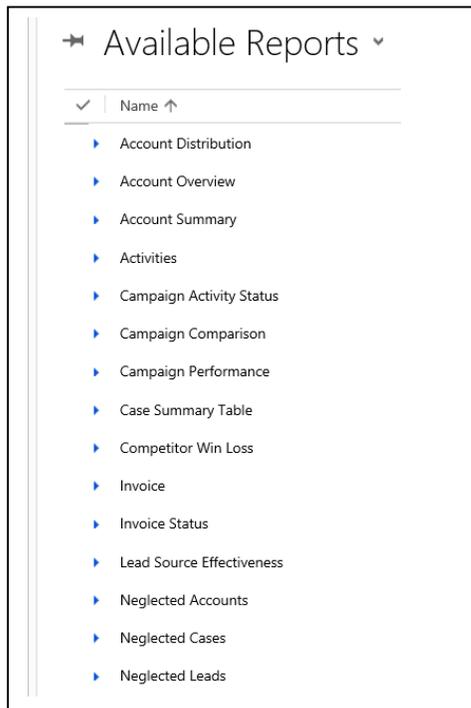
NOTE: Only users with appropriate security rights may export data to Excel.

## Sample Excel Export before manipulation:

Client	End of Service	Purpose	Resolution	Total Hours	Billed Hours	Hardware Pt	Hardware	Misc Purcha	Misc. Purcha
2 An	11/19/2014 11:55 AM	Domain errors are showing	Checked DNS pointers in C	0.68	0.68	No		No	
3 An	1/14/2015 4:00 PM	Review Tracking with Rose	Showed Roseann various v	0.50	0.50	No		No	
4 An	1/15/2015 10:32 AM	Review Tracking with Rose	Helped Roseann configure	0.53	0.53	No		No	
5 C	11/18/2014 10:00 AM	Larry unable to send or rec	Ran test account settings ir	0.42	0.42	No		No	
6 Dia	1/5/2015 8:30 PM	Not able to print and Adobe	Reactivated Adobe Acrobat	0.50	0.50	No		No	
7 Dia	1/13/2015 11:05 AM	Diane wants to get rid of m	Logmein- Showed Diane h	0.08	0.08	No		No	
8 En	12/29/2014 12:30 PM	Test redesigning the Billing	After working with Microsof	1.00	0.00	No		No	
9 En	12/29/2014 4:00 PM	Test redesigning the Billing	Finished redesigning. Ran	2.00	0.00	No		No	
10 En	1/7/2015 1:35 PM	Tom is not able to access s	Tom called wanting to know	0.08	0.08	No		No	
11 En	1/7/2015 3:53 PM	Tom is not able to access s	Started a gotomeeting and	0.83	0.83	No		No	
12 En	1/14/2015 11:00 AM	Test redesigning the Billing	Tech Support sent over an	0.75	0.00	No		No	
13 En	1/15/2015 3:00 PM	Test redesigning the Billing	Tech called and we went th	0.33	0.00	No		No	
14 Jim	1/8/2015 4:25 PM	Test display settings	Jim's display is off in ACT!	1.00	1.00	No		No	
15 Ka	1/27/2015 11:50 PM	Transfer of X-Rays are timi	Spoke with Mike with Alta V	0.50	0.50	No		No	

## Built-in Reports:

There are 25 built-in reports providing information about accounts, activities, marketing campaign results, lead sources, opportunities, sales activity and history, competitive successes, case management, and user security profiles.



**Sample Built-in Case Summary Table:**

First Horizontal Group: Owner | First Vertical Group: Status Reason  
 Second Horizontal Group: (none) | Second Vertical Group: (none)

1 of 1 | 100% | Find | Next

### Case Summary Table

Filter Summary

Status Reason	Data	Susan Eckles	Erin Barton	Yeshua Gutierrez	Total
In Progress	Count	20	50	28	98
	Total %	15.27 %	38.17 %	21.37 %	74.81 %
Problem Solved	Count	27	0	6	33
	Total %	20.61 %	0.00 %	4.58 %	25.19 %
Total	Count	47	50	34	131
	Total %	35.88 %	38.17 %	25.95 %	100.00 %

1/29/2015 3:38 PM | Prepared by: Susan Eckles

**Custom Reports:**

When you need to manipulate your data further, Power Time will write custom reports to reflect your data in almost any format. Here are a few samples:

### Gross Profit - Current Month

Client	Vehicle/Stock #	Closing	Lender	Dealer	Deal Type	Price	Gross	Net Profit
St	2008 Suburban LT 8G179911	1/28/2015			Sale	\$15,000.00	(\$14,250.00)	(\$14,250.00)
St	2015 LR4 FA749077	1/12/2015		Autobahn Land Rover	Sale	\$55,925.00	\$0.00	\$0.00
St	2015 Yukon XL Denali FR548689	1/9/2015		Ron Carter	Lease	\$71,497.00	\$8,053.28	\$8,053.28
St	2015 Wrangler Unlimited Rubicon FL613934	1/22/2015	ACU Of Texas	River Oaks CJD	Sale	\$44,035.00	(\$60,000.00)	(\$60,000.00)
Th	2015 F250 FEC22611	1/12/2015	U.S. Bank, N.A.		Sale	\$30,715.99	\$309.84	\$309.84
Tr	2015 Transit Connect F1179054	1/27/2015	U.S. Bank, N.A.	Helfman Ford	Sale	\$21,250.00	(\$22,883.56)	(\$22,883.56)
Up	2010 LX570 Luxury A4045522	1/19/2015	U.S. Bank, N.A.		Sale	\$48,878.00	\$4,037.26	\$3,737.26
W	2015 F150 King Ranch FFA15312	1/9/2015	U.S. Bank, N.A.	Helfman Ford	Sale	\$59,205.00	\$1,955.59	\$1,705.59
W	2011 Suburban LT BR223535	1/14/2015			Sale	\$28,846.00	(\$22,200.00)	(\$22,200.00)
<b>Total Clients</b>	<b>Total Vehicles</b>	<b>Total Sales</b>	<b>Total Gross</b>	<b>Total Net Profit</b>	<b>Avg. Price</b>	<b>Avg. Gross</b>	<b>Avg. Net Profit</b>	
44	60	\$2,124,324.68			\$35,405.41			

### Commissions Last Month

Filter Summary

Owner	Closing Date	Contact	Fund Type	New/Used	Year	Model	Gross	SC Gross	Commissions
<b>Bill (Count: 5)</b>									
	12/2/2014	Ar	Outside	Used	2011	Grand Cherokee	(\$375.01)	\$0.00	\$300.00
	12/1/2014	Jo	Loan	Used	2011	CLS63	\$3,119.99	\$0.00	\$500.00
	12/1/2014	Br	Cash	Used	2009	Highlander	\$3,625.01	\$0.00	\$300.00
	12/2/2014	Da	Loan	Used	2010	F150	\$1,397.64	\$0.00	\$300.00
	12/1/2014	Ma	Dealer	NEW	2015	RDX	\$1,000.00	\$0.00	\$250.00
<b>Summary</b>							<b>\$8,767.63</b>		<b>\$1,650.00</b>
<b>Le (Count: 2)</b>									
	12/1/2014	Ja	Loan	Used	2015	F250	\$1,199.98	\$0.00	\$0.00
	12/2/2014	Al	Dealer	NEW	2015	IS250	\$1,000.00	\$0.00	\$0.00
<b>Summary</b>							<b>\$2,199.98</b>		<b>\$0.00</b>
							<b>\$10,967.61</b>		<b>\$1,650.00</b>



**Addition-Deletion Report**

Activity for the month of December, 2014

		PHONE:			FAX:
<b>September 2014</b>					
	Hire Date	Enrollment Effective Date	SSN (last 4)	Term Date	
Cyn		10/1/2014	3486		
<b>Dental</b>	<b>Horizon BCBS NJ</b>			<b>Date Started</b>	<b>Follow up Date</b>
Open Enrollment				9/9/2014	1/29/2015
9/9/2014 10:12:55 AM	Jer	employee changed tier level for dental plan subgroup 30.			
9/22/2014 11:31:56 AM	Lyc	Per Horizon online, complete.			
<b>November 2014</b>					
	Hire Date	Enrollment Effective Date	SSN (last 4)	Term Date	
Whit	10/6/2014	1/1/2015	8361		
<b>Vol. Life</b>	<b>USable</b>			<b>Date Started</b>	<b>Follow up Date</b>
New Enrollment				11/6/2014	OPEN
11/6/2014 5:06:09 PM	Jer	Employee enrolled in voluntary life and AD&D coverage for \$100,00 and spouse voluntary life and AD&D coverage for \$10,000.			
Cou			5796	11/21/2014	
<b>Dental</b>	<b>Horizon BCBS NJ</b>			<b>Date Started</b>	<b>Follow up Date</b>
Termination				11/21/2014	12/2/2014
11/21/2014 4:54:51 PM	Jer	Per Christine's email, employee terminated 11/21/2014.			
12/2/2014 10:10:47 AM	Lyc	Per Horizon online, complete.			
<b>Health</b>	<b>Horizon BCBS NJ</b>			<b>Date Started</b>	<b>Follow up Date</b>
Termination				11/21/2014	12/2/2014

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Thank you for looking at a few examples of how data can be reported from Microsoft Dynamics CRM. Call to learn more about how Microsoft Dynamics CRM can contribute to and measure your success!

Best regards,

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