



Dashboard for MS CRM 4

Version 4.0

Users's Guide

(How to use Dashboard for MS CRM 4)

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USERS GUIDE

Introduction

Dashboard for MS CRM 4 is a Microsoft CRM Add-On which gives you the possibility to generate charts and views very easily.

Starting Dashboard

Start your Web Browser and open your MS CRM 4.

At the left side in the Workplace area you see a new item called Dashboard. Click on it!

Advanced start options for Dashboard

You can start Dashboard with the following parameters:

DBID You can define a DashboardID to view this Dashboard on startup.

ShowMenu You can show or hide the menu. If you hide the menu the user interface is limited.

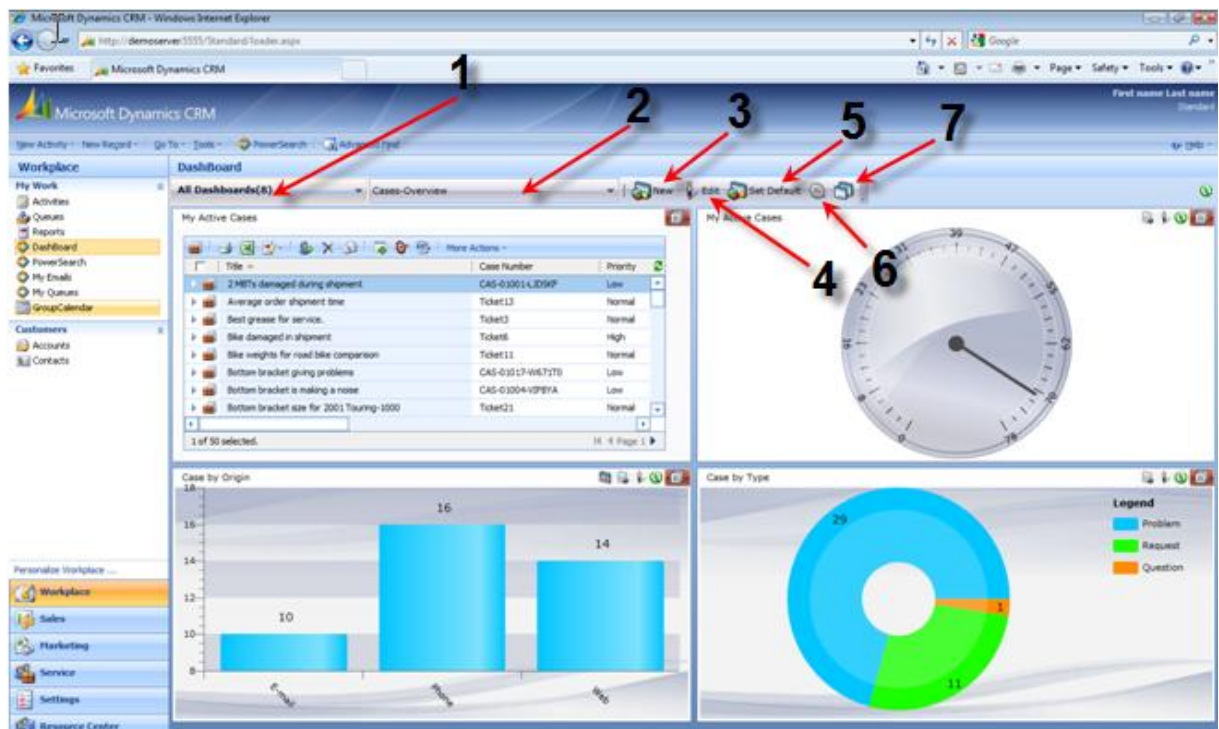
If you not define the **ShowMenu** parameter, the default value is false.

Example:

<http://server:port/DashBoard/DashBoard.aspx?orgname=YourOrgname&DBID={3223A69E-DF9-DE11-A1CC-001CC4AA705A}&ShowMenu=true>

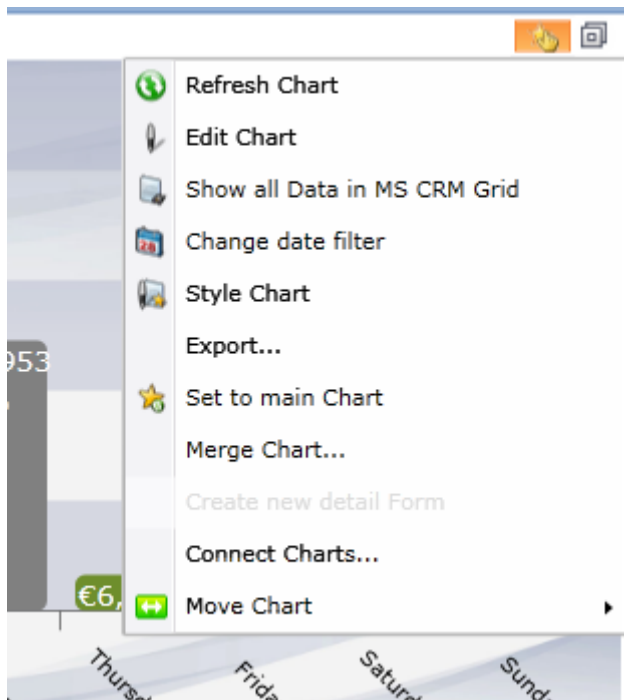
Main Window

The following screen will show and describe the main window of Dashboard:



- 1) With this box you can choose the dashboard-category
- 2) Depending on the "Dashboard-Category" you get a list of all available Dashboards
- 3) With the "New"-Button you can generate a complete new Dashboard for you
- 4) With the "Edit"-Button you are able to edit the actual opened Dashboard.
- 5) With the "Set Default" you are able to set a specific Dashboard as you default Dashboard. If you do that on a specific entity you are able to define the default Dashboard for a specific entity(f.e. account, contact,..)
- 6) The "Import/Export" Button allows you to import or export specific Dashboards. This make it possible to transfer Dashboards or charts from one system to the next or from one dashboard to the other.
- 7) This button allows you to open the Dashboard in a separate Internet Explorer.

Chart Action Menu



- Refresh Chart
Click on this item to refresh the Chart
- Edit Chart
Opens the MSCRM chart-entity form to edit chart values.
- Show all Data in MS CRM Grid
Opens a new window with all the chart data in the known MSCRM Grid.
- Change date filter
Here you can set a custom date-range for the x-axis.
- Style Chart
Here you can define many style and format settings for the chart.
- Export...
Exports the chart to an image.
- Set to main Chart
Sets a chart to a main layout area. For more information see: "Layout Mode (Chart View)"
- Merge Chart...
You have the possibility to merge charts. For more information see: "Merge Charts"
- Create new detail Form
With this feature you can create relational Views. For more information see: "Split Screen (Connect to relational Charts)"

- Connect Charts...
With this feature you can create relational Views. For more information see: "Split Screen (Connect to relational Charts)"
- Move Chart
Here you can reorder the Charts.
Advice: It's a flow layout, so choose the "to right" item to move a chart down.

How to generate a new general Dashboard

Open your MS CRM and click on Dashboard in the navigation bar:

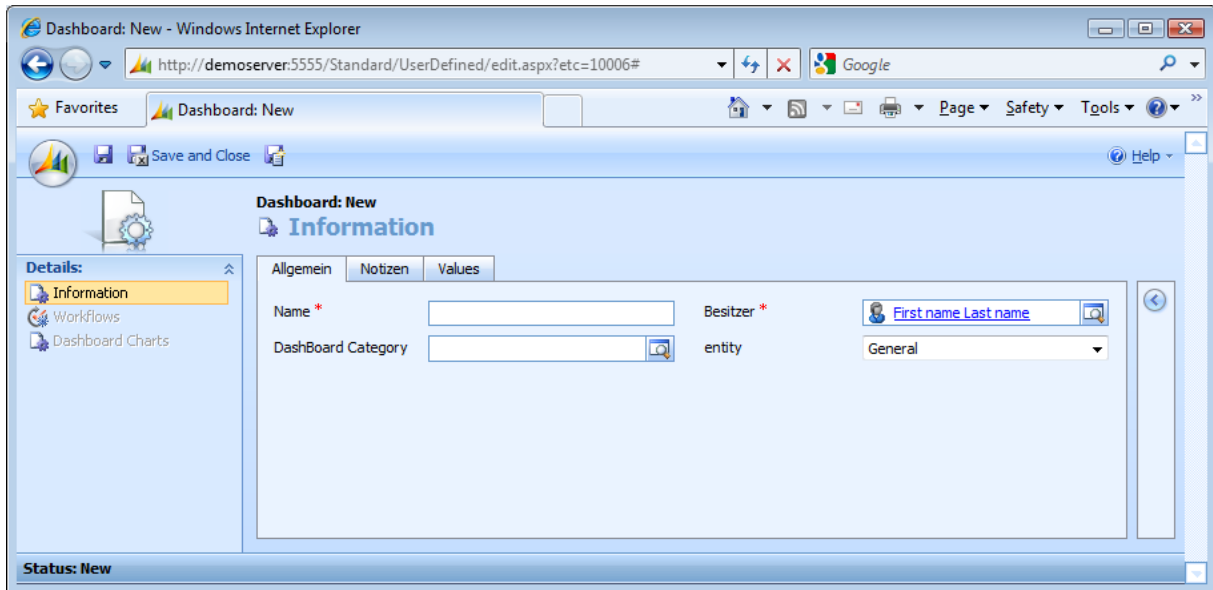
The screenshot displays the Microsoft Dynamics CRM interface. The top navigation bar includes 'New Activity', 'New Record', 'Go To', 'Tools', 'PowerSearch', and 'Advanced Find'. The left sidebar shows 'Workplace' with sections for 'My Work' (Activities, Queues, Reports, Dashboard, PowerSearch, My Emails, My Queues, GroupCalendar) and 'Customers' (Accounts, Contacts). The main area is titled 'Dashboard' and contains several components:

- My Active Cases Table:** A table listing cases with columns for Title, Case Number, and Priority. The data is as follows:

Title	Case Number	Priority
2 MBTs damaged during shipment	CAS-01001-LJDSKF	Low
Average order shipment time	Ticket13	Normal
Best grease for service.	Ticket13	Normal
Bike damaged in shipment	Ticket6	High
Bike weights for road bike comparison	Ticket11	Normal
Bottom bracket giving problems	CAS-01017-W67IT0	Low
Bottom bracket is making a noise	CAS-01004-VF8YA	Low
Bottom bracket size for 2001 Touring-1000	Ticket21	Normal
- My Active Cases Gauge:** A circular gauge chart showing a value of approximately 39.
- Case by Origin Bar Chart:** A bar chart showing the number of cases by origin: E-mail (10), Phone (16), and Web (14).
- Case by Type Donut Chart:** A donut chart showing the distribution of cases by type: Problem (29), Request (11), and Question (1). A legend on the right identifies the colors: blue for Problem, green for Request, and orange for Question.

The bottom of the interface shows a taskbar with the Microsoft Dynamics application and a document window. The system tray on the right indicates the time as 13:31.

Click on the "New" button on the toolbar and the Dashboard-form will open.

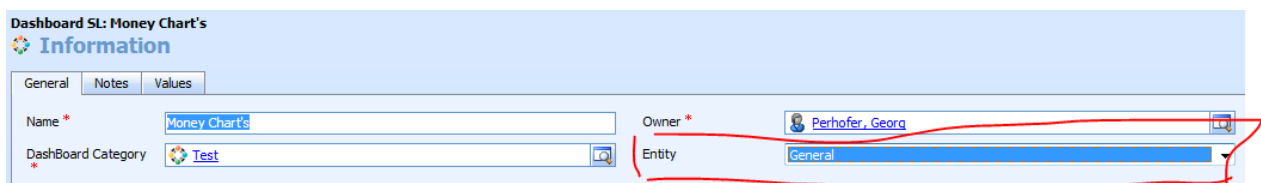


Fill in the Name of the Dashboard and select an existing Dashboard Category. Leave the value of the Entity field on "General".

Click on "Save and Close" and reload the Dashboard. Your new Dashboard is available now.

How to generate a new entity specific Dashboard

With the same steps as in the previous chapter explained you can also generate entity specific Dashboards. The only difference is that you have to change the "Entity"-field value on the Dashboard form and select the entity to which it is for.



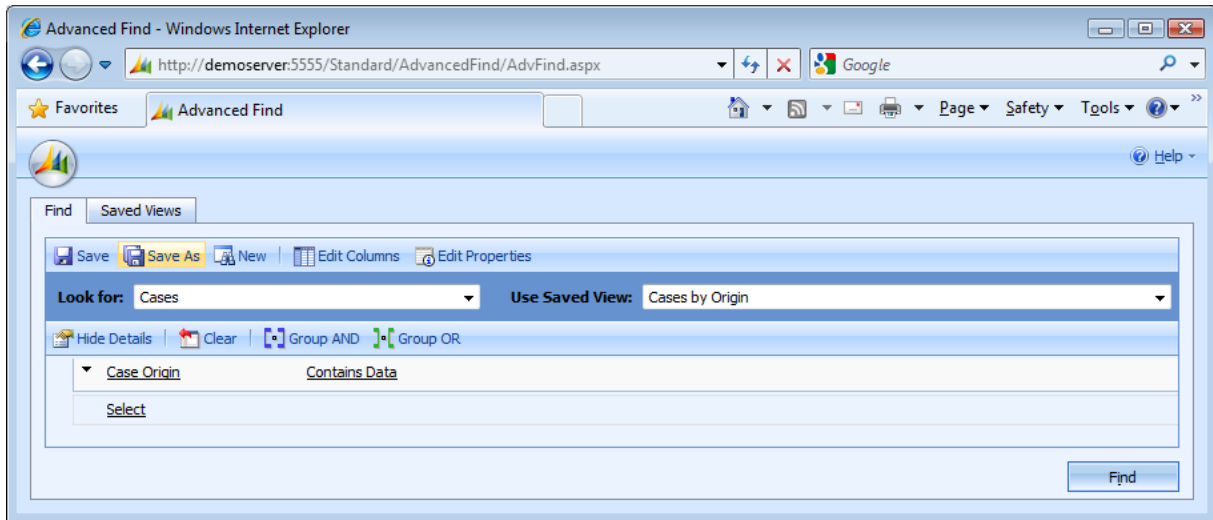
If you elect "General" you can find this Dashboard at your Workplace "My Work". If you elect an entity, you find the Dashboard in this entity under the Details Menu.

If you create a Dashboard for a specific Entity, than you have to define a "Filter Column" in the Chart later to view the values related to the current recorded entity.

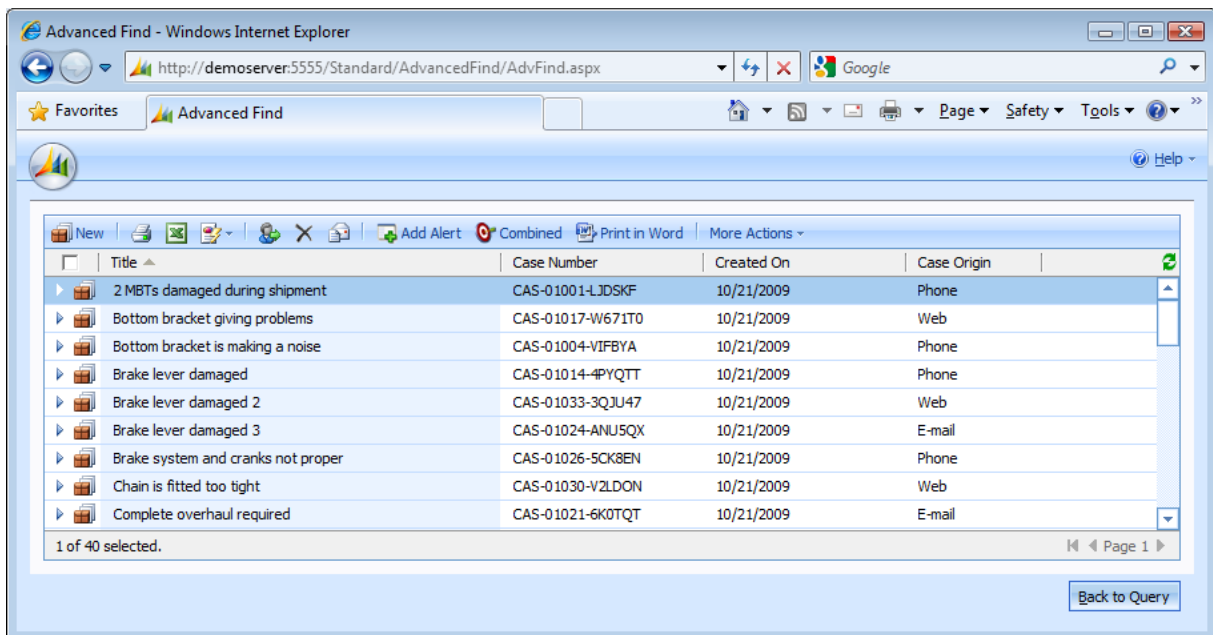
Basic information for generating charts

All charts you can generate with the Dashboard for MS CRM are based on Advanced Finds. The first step for you is to generate an Advanced Find which gives as result all the data you want to use for the chart. For example if you want to generate a pie chart which includes all active cases and you want to group them by Origin (Email, Phone, Web,..) you have to go to the Advanced Finds and generate an Advanced Find based on Cases and you need at least the column Origin in the result.

You can see an example here:



When clicking on the Find-Button you will get following result:



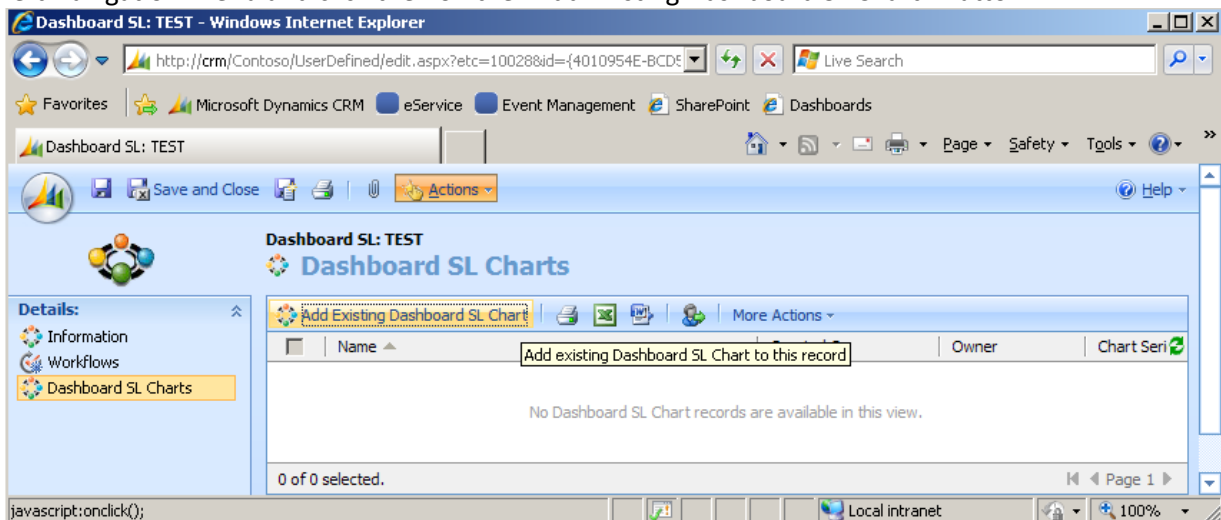
In this list the column "Case Origin" has to be on it.

IMPORTANT: You only can use columns in the chart which are added to the Advanced Find. Save a Name. This is important to find it afterwards.

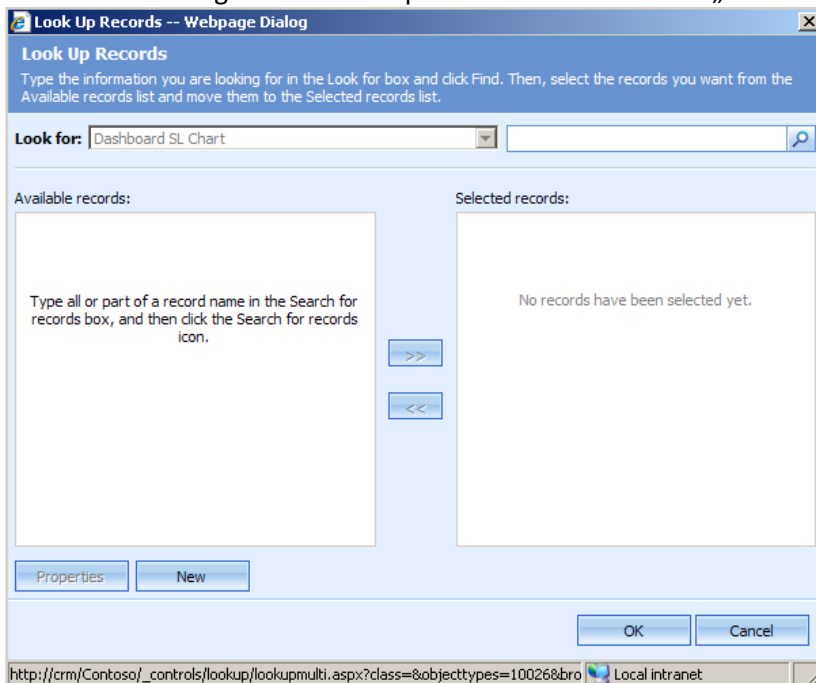
Generating a simple chart categorized by a pick list field

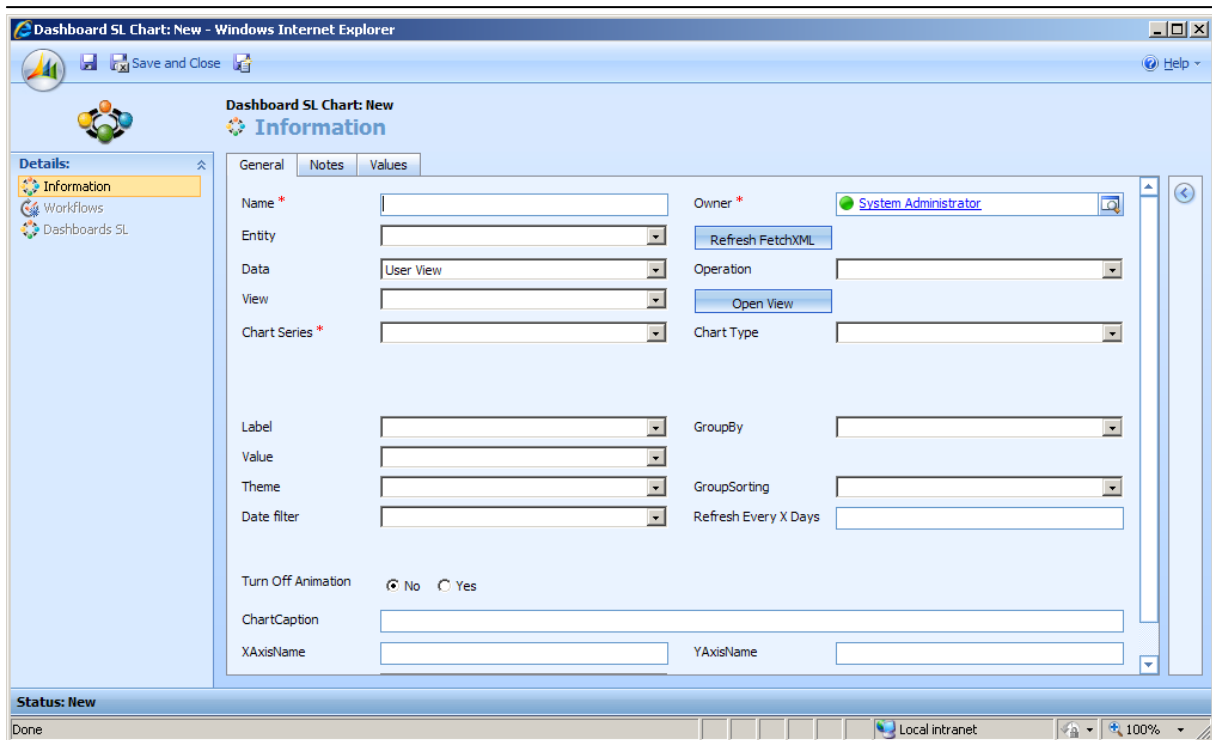
As explained in the previous chapter all the charts are based on an Advanced Find. In this chapter we will generate a pie chart which shows all Cases grouped by Origin. For this you have to generate an Advanced Find as explained in the previous chapter.

After that open the Dashboard on which you want to add this chart and click on "Edit"-Button in the toolbar. The following window will open and you have to click on the "Dashboard SL Charts" on the left Navigation-Menu and click then on the "Add Existing Dashboard SL Chart"-Button.



Then the following Window will open and then click on the „New“-Button.





Here you see now the main window to configure a chart. The important fields for generating a simple pie chart are following:

Name: Fill in the name of the Chart

Entity: Select the entity. In our example it Case.

Data: Select the type of Advanced Find you want to use. In our example you can leave it on "User View"

View: Select the Advanced Find we have created before.

Chart Series: For a pie chart select "Single Series"

Label: Select the field "Case Orgin"

Value: Select the field "Case Orgin"

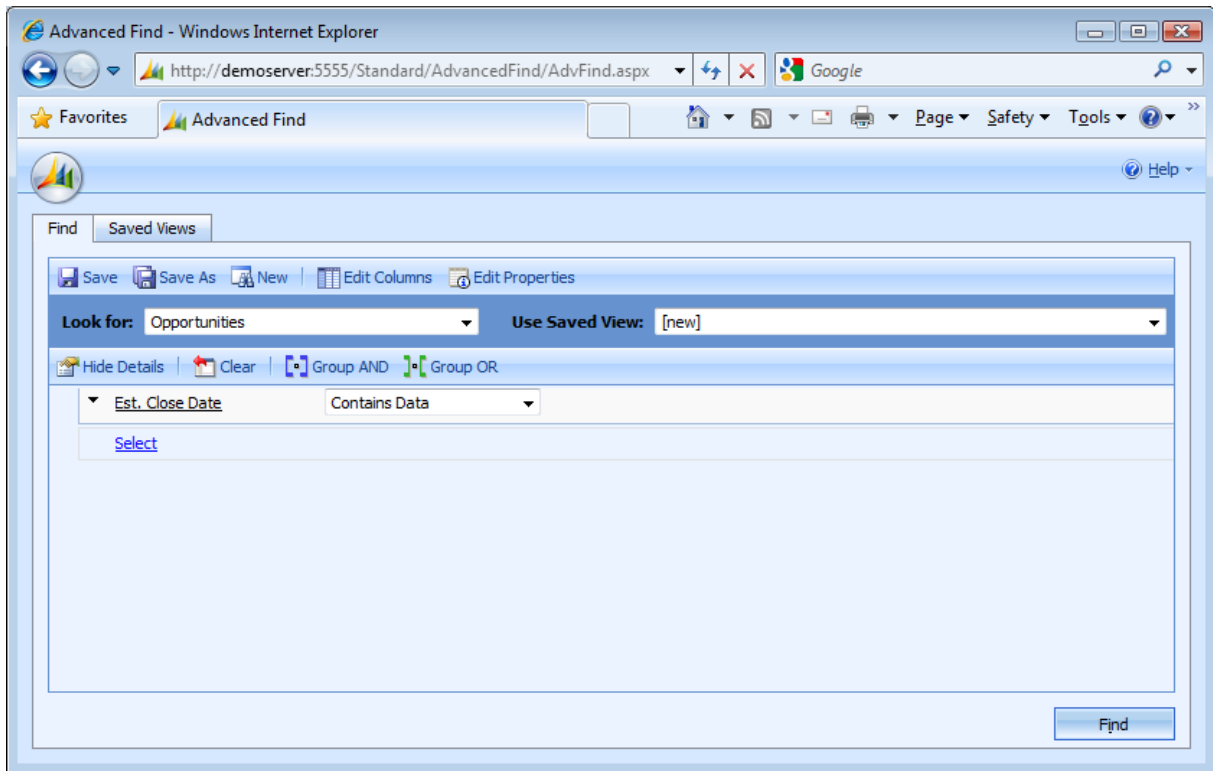
Chart Type: You can select here the "Doughnut" or "Pie". All other chart types are also possible.

Chart Caption: Fill in the title for the Chart.

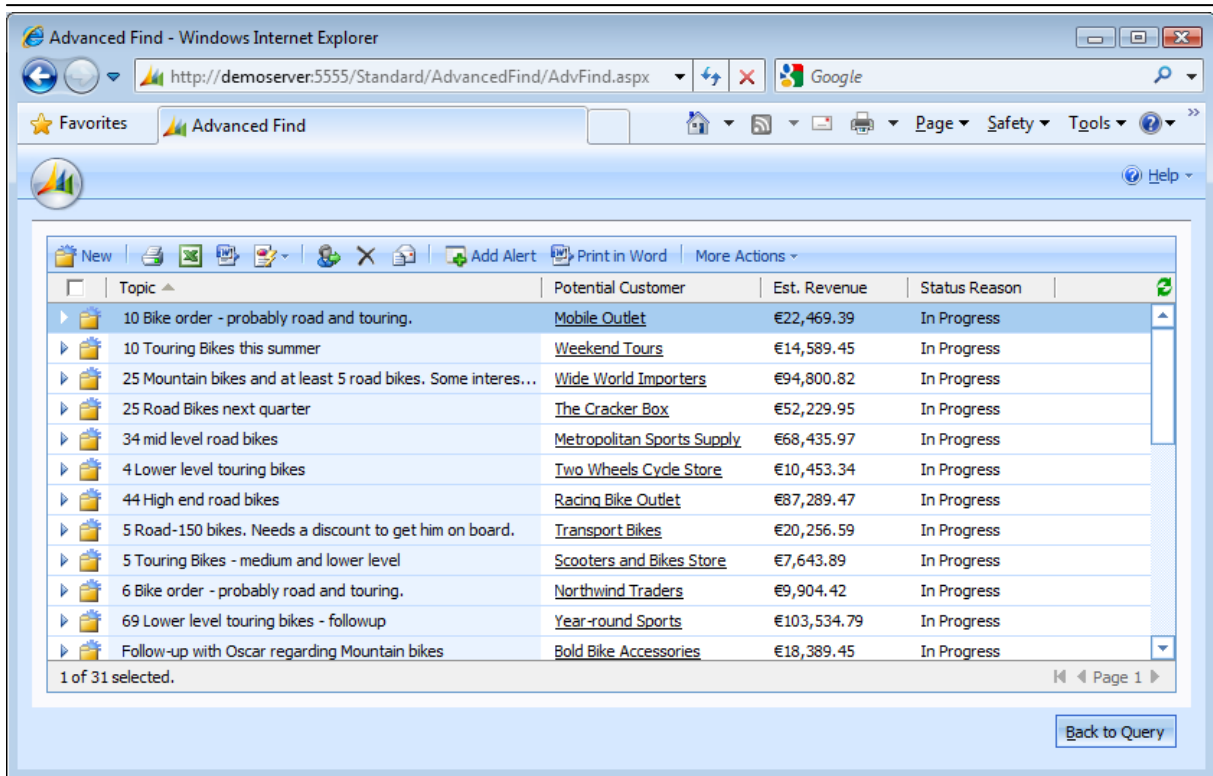
Generating a simple chart categorized by a date field

First you have to prepare the Advanced Find so that you have the date field also on the result. In this example we will build a single series area chart which shows me the opportunities grouped by month.

Open the Advanced Find and select the entity for which you want to generate a chart. In our case it is opportunity.

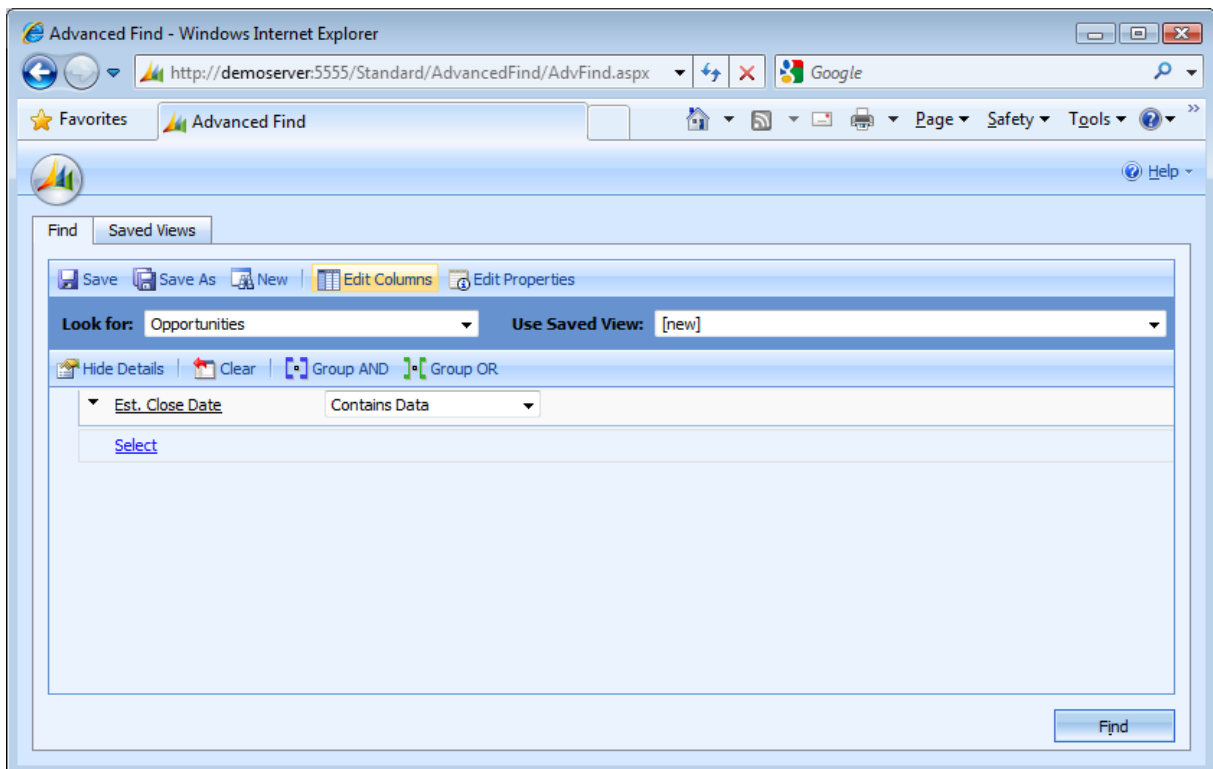


Add the condition to only see opportunities in which an estimated close date is inserted. Now click on "Find"-Button and check the result.

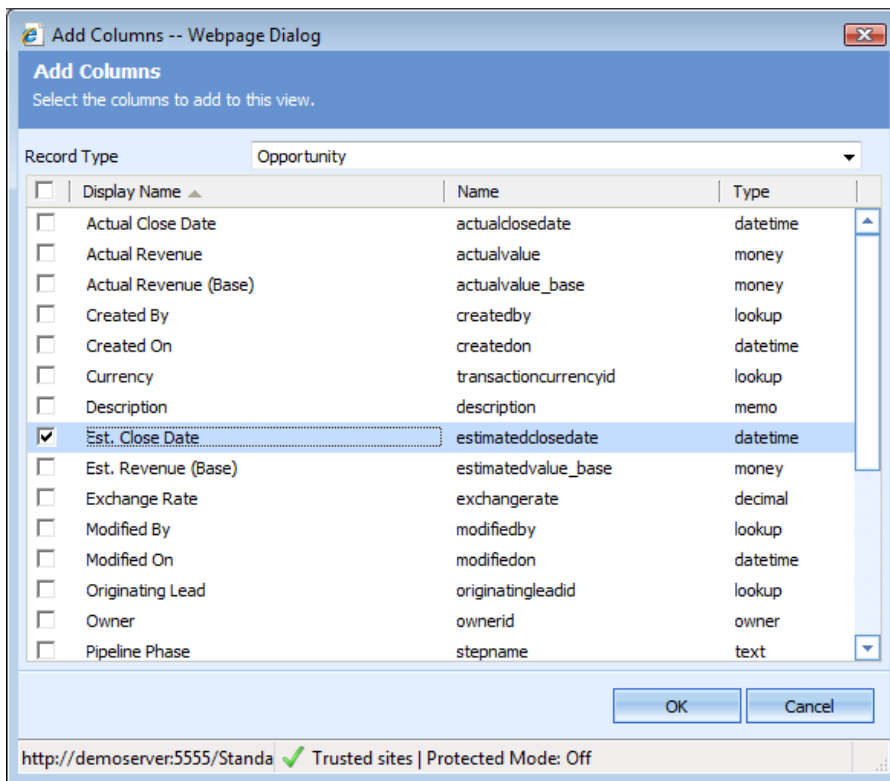
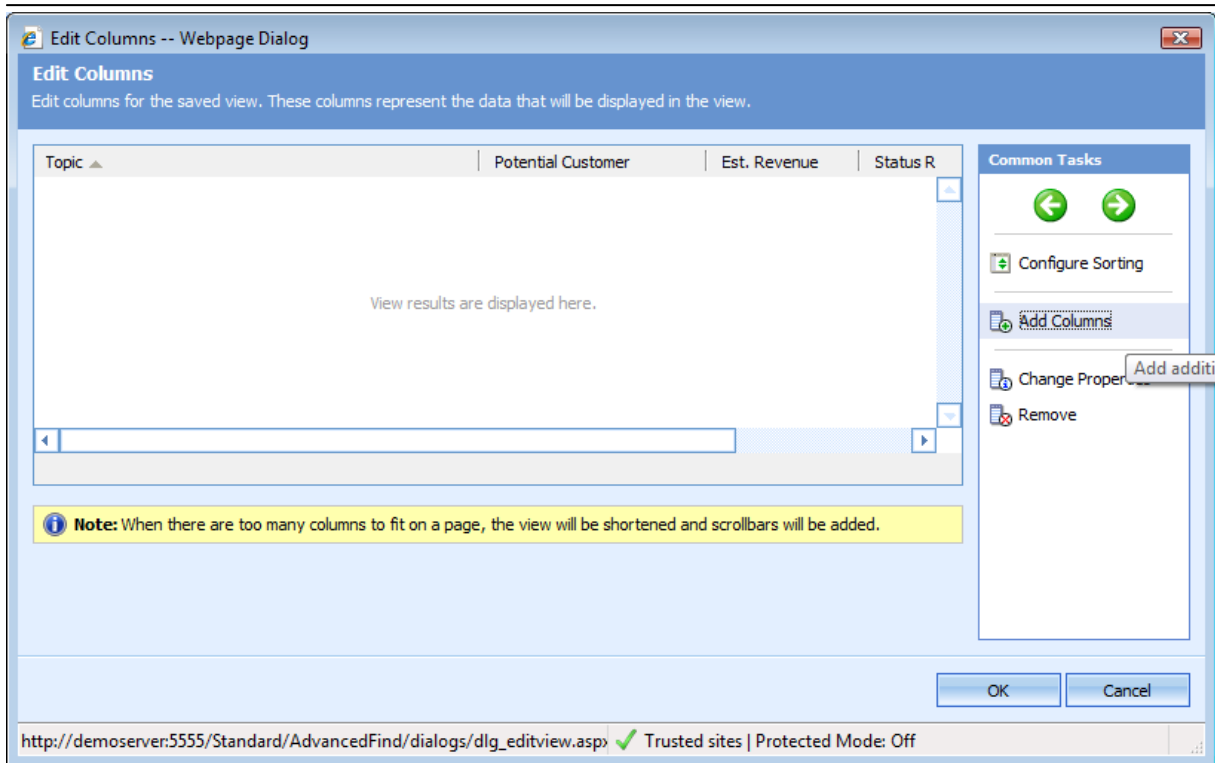


Check if the estimated close date is as column visible. If it is not visible you have to add the field.

Go back to the definition of the Advanced Find and click on the "Edit Column"-Button to add the column.



The "Edit Column" Window opens and it is possible with the "Add Column" Button to add the necessary column.



Select the "Est. Close Date" and click on OK and save the Advanced Find.

Now you have to click on “New Chart” Button on the Dashboard.

The screenshot shows a configuration window for a dashboard chart. The title is 'Dashboard Chart: Opportunities'. The window is divided into several sections:

- PowerSearch Dashboard:** A search box containing 'Test Dashboard'.
- Name:** A text field containing 'Opportunities'.
- Entity:** A dropdown menu set to 'opportunity'.
- Data:** A dropdown menu set to 'User View'.
- View:** A dropdown menu set to 'Estimated Opportunities'.
- Chart Series:** A dropdown menu set to 'Single Series'.
- Label:** A dropdown menu set to 'estimatedclosedate'.
- Value:** A dropdown menu set to 'estimatedvalue'.
- Theme:** A dropdown menu.
- DateFilterFields:** A dropdown menu set to 'estimatedclosedate'.
- DateFieldFrom:** A text field.
- DateFieldTo:** A text field.
- ChartCaption:** A text field.
- XAxisName:** A text field.
- XAxisType:** A dropdown menu.
- Filter column:** A dropdown menu.
- Besitzer:** A dropdown menu set to 'First name Last name'.
- Operation:** A dropdown menu set to 'sum'.
- Chart Type:** A dropdown menu set to 'Line 2D'.
- GroupBy:** A dropdown menu set to 'per Month'.
- Refreshes every X Days:** A text field.

Here you see now the main window to configure a chart. The important fields for generating this chart are following:

Name: Fill in the name of the Chart

Entity: Select the entity. In our example it is **Opportunity**.

Data: Select the type of Advanced Find you want to use. In our example you can leave it on “User View”

View: Select the Advanced Find we have created before.

Chart Series: For a line chart select “Single Series”

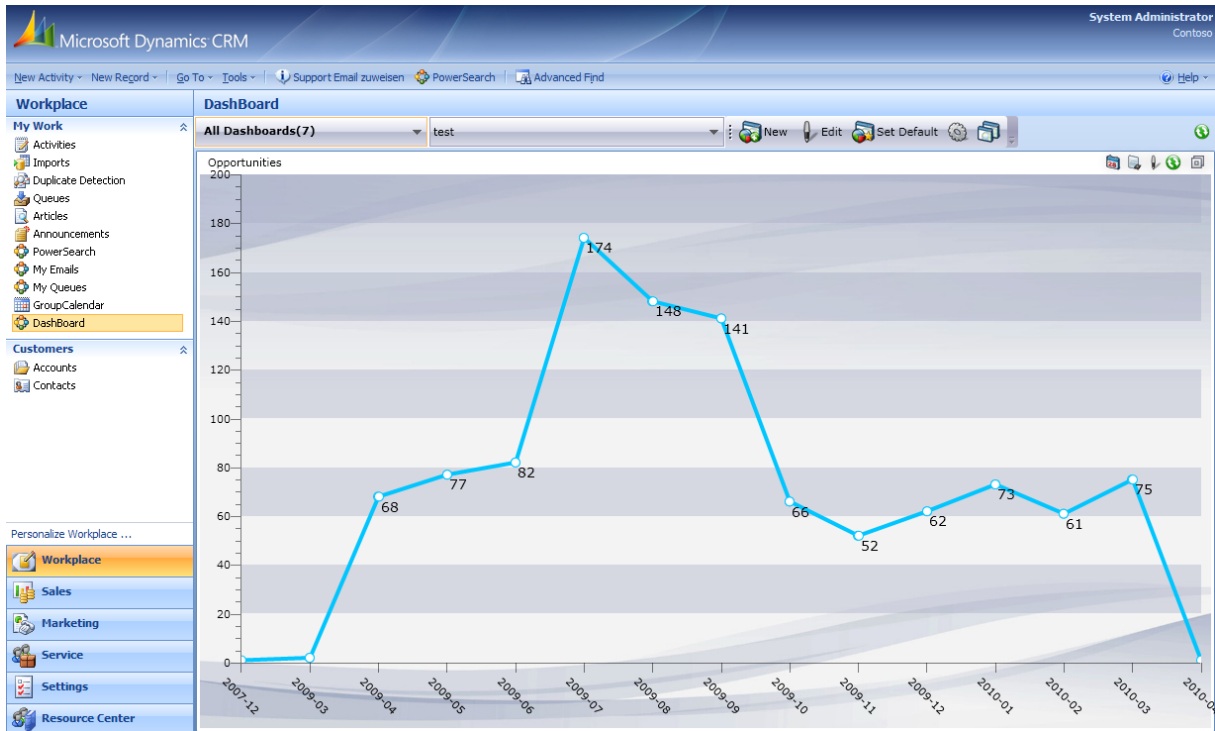
Label: Select the field “Est. Close Date”

Value: Select the field “Est. Close Date”

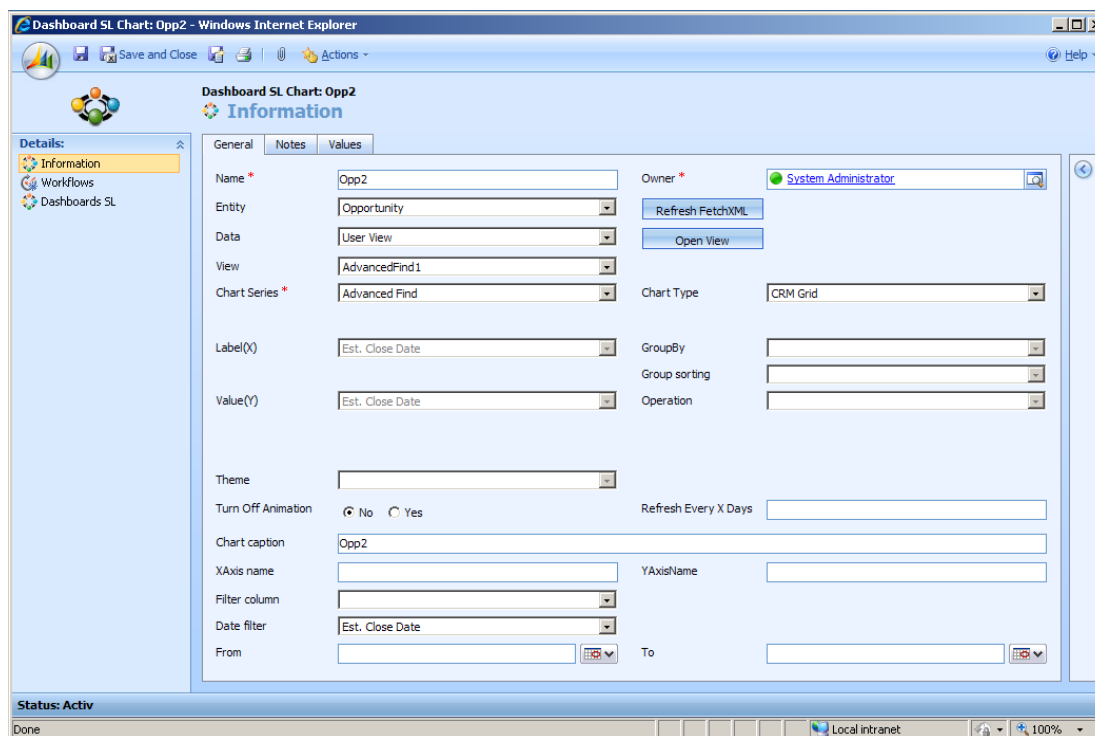
Chart Type: You can select here the Line 2d

Chart Caption: Fill in the title for the Chart.

Now you have to save this chart and go back to your Dashboard and reload it. You will see following chart.



Generating a window with a CRM Grid



Here you see now the main window to configure a CRM grid. The important fields for generating a simple pie chart are following:

Name: Fill in the name of the Chart

Entity: Select the entity. In our example it is (Incident this is the CRM internal name for Cases)

Data: Select the type of Advanced Find you want to use. In our example you can leave it on "User View"

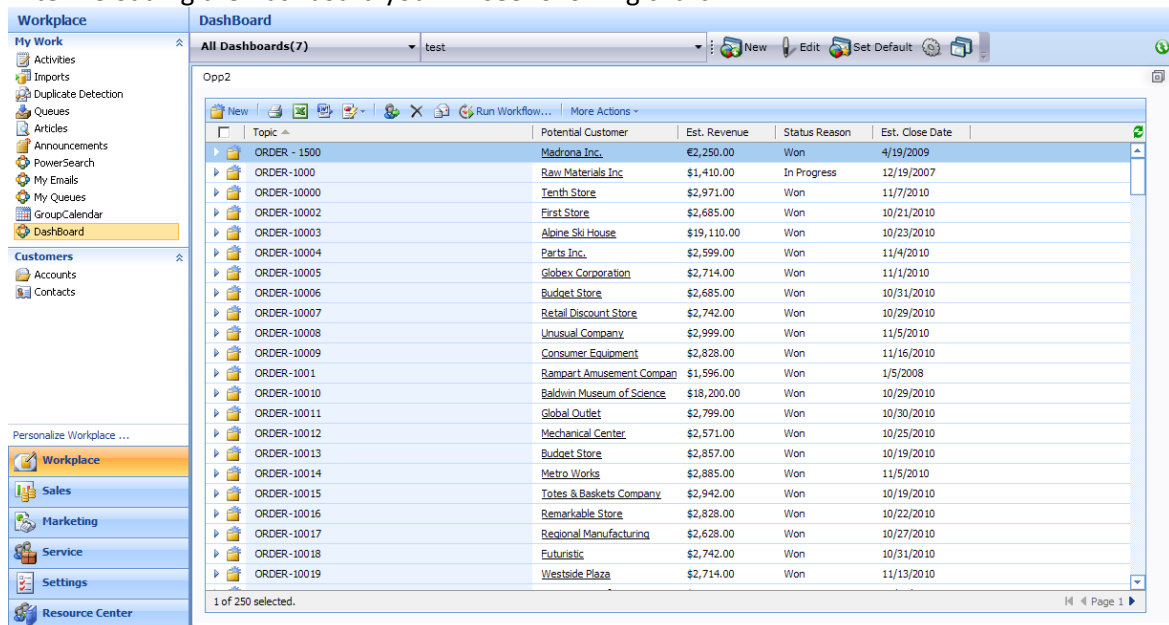
View: Select the Advanced Find you have created

Chart Series: For a CRM-Grid select "Advanced Find"

Chart Type: Select CRM Grid

Chart Caption: Fill in the title for the Chart.

After Reloading the Dashboard you will see following chart.



Generating a Multiple Series Chart

Dashboard SL Chart: Opp3 - Windows Internet Explorer

Dashboard SL Chart: Opp3
Information

Details: Information, Workflows, Dashboards SL

General | Notes | Values

Name * Owner *

Entity Refresh FetchXML

Data Open View

View

Chart Series * Chart Type

Label(X) GroupBy

Value(Y) Group sorting

Series column Operation

GroupBySeries

GroupBySeriesSorting

Theme

Turn Off Animation No Yes Refresh Every X Days

Chart caption

XAxis name

YAxisName

Filter column

Date filter

From To

Status: Activ

Done Local intranet 100%

Name: Fill in the name of the Chart

Entity: Select the entity. In our example it is (Incident this is the CRM internal name for Cases)

Data: Select the type of Advanced Find you want to use. In our example you can leave it on "User View"

View: Select the Advanced Find you have created

Chart Series: Now Select "Multiple Series"

Label: For example select the field "Est. Close Date"

Value: For example select the field "Est. Revenue"

Date Filter: For example select the field "Est. Close Date"

Chart Type: For example select "Bar 2D"

Operation: For example select "sum"

Chart Caption: Fill in the title for the Chart.

GroupBy: Here you can select for example "per Month"

Series definition: For example select the field "Status Reason"

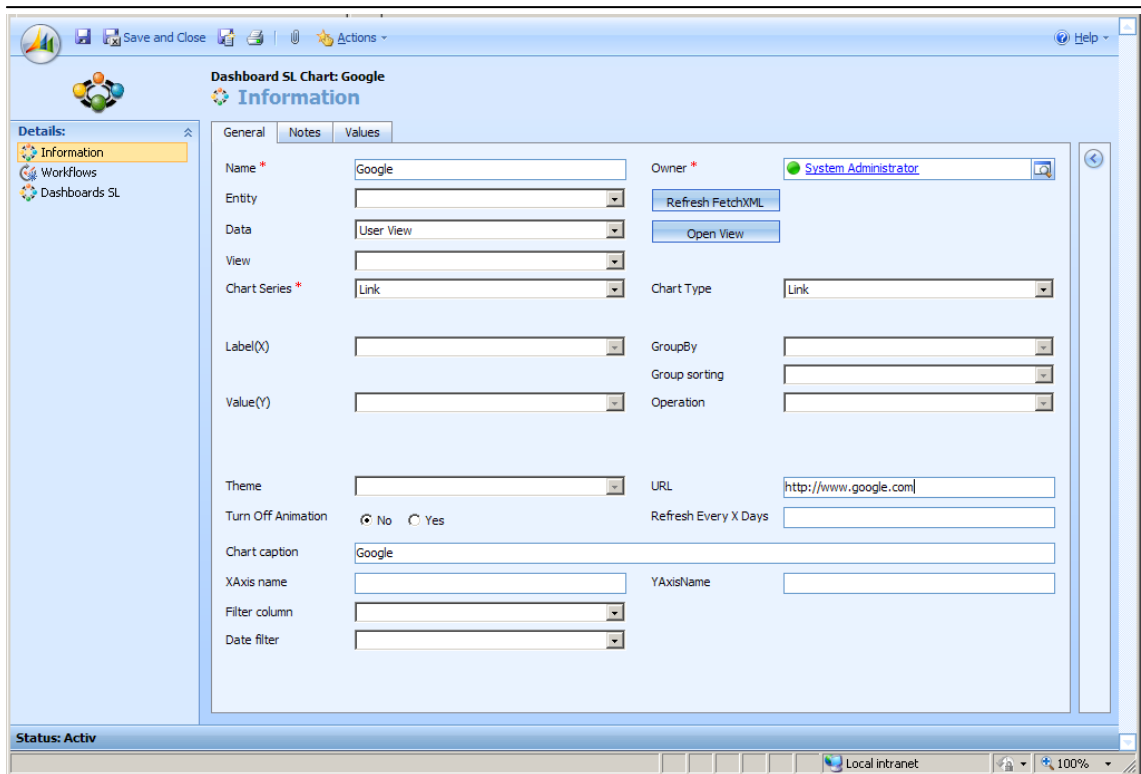
From: Select a Date

To: Select a Date

After Reloading the Dashboard you will see following chart.



Generating a Link Chart



Name: Fill in the name of the Chart

Entity: Select the entity. In our example it is (Incident this is the CRM internal name for Cases)

Data: Select the type of Advanced Find you want to use. In our example you can leave it on "User View"

Chart Series: Now Select "Link"

Chart Type: Now Select "Link"

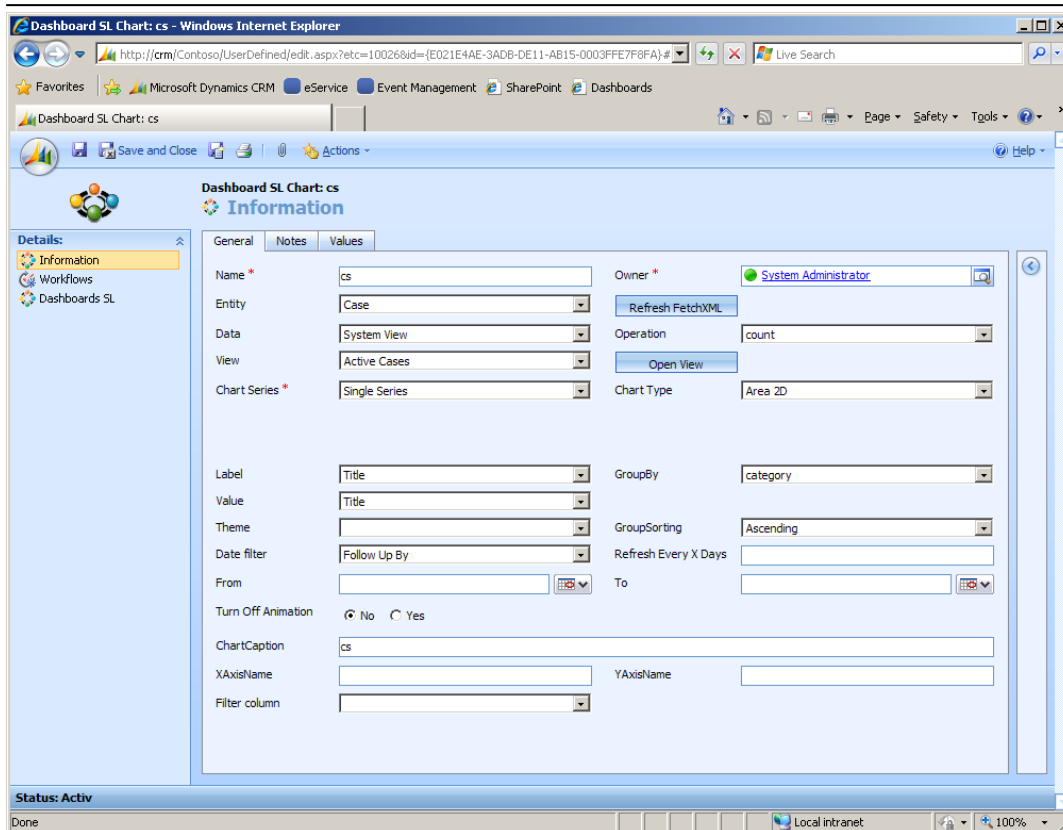
Chart Caption: Fill in the title for the Chart.

URL: Fill in you URL (ex. http://www.google.com)

After Reloading the Dashboard you will see following chart.



Generating an entity specific Chart



Name: Fill in the name of the Chart

Entity: Select the entity. In our example it is (Incident this is the CRM internal name for Cases)

Data: Select the type of Advanced Find you want to use. In our example you can leave it on "User View"

View: For example select the field "Active Cases"

Chart Series: Now Select "Single Series"

Label: For example select the field "Title"

Value: For example select the field "Title"

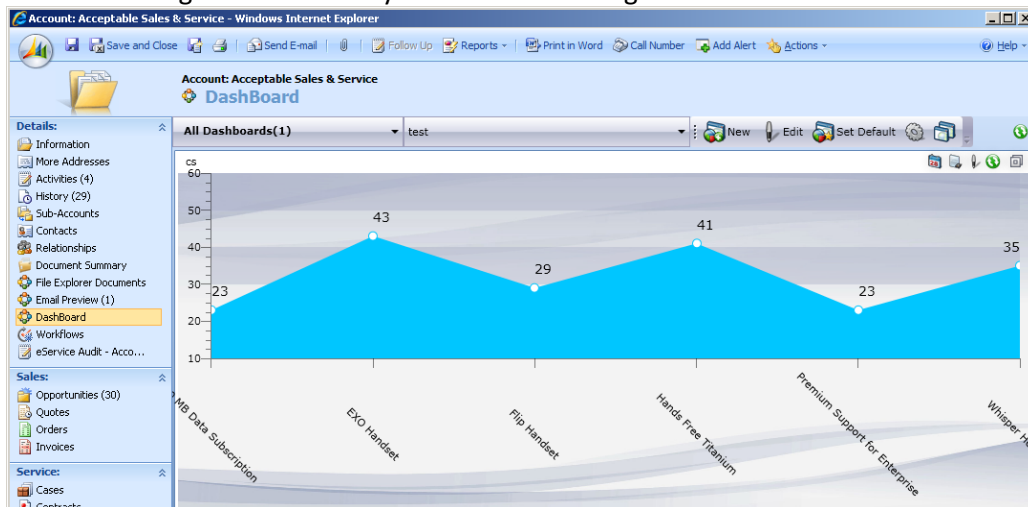
Date Filter: For example select the field "Follow Up By"

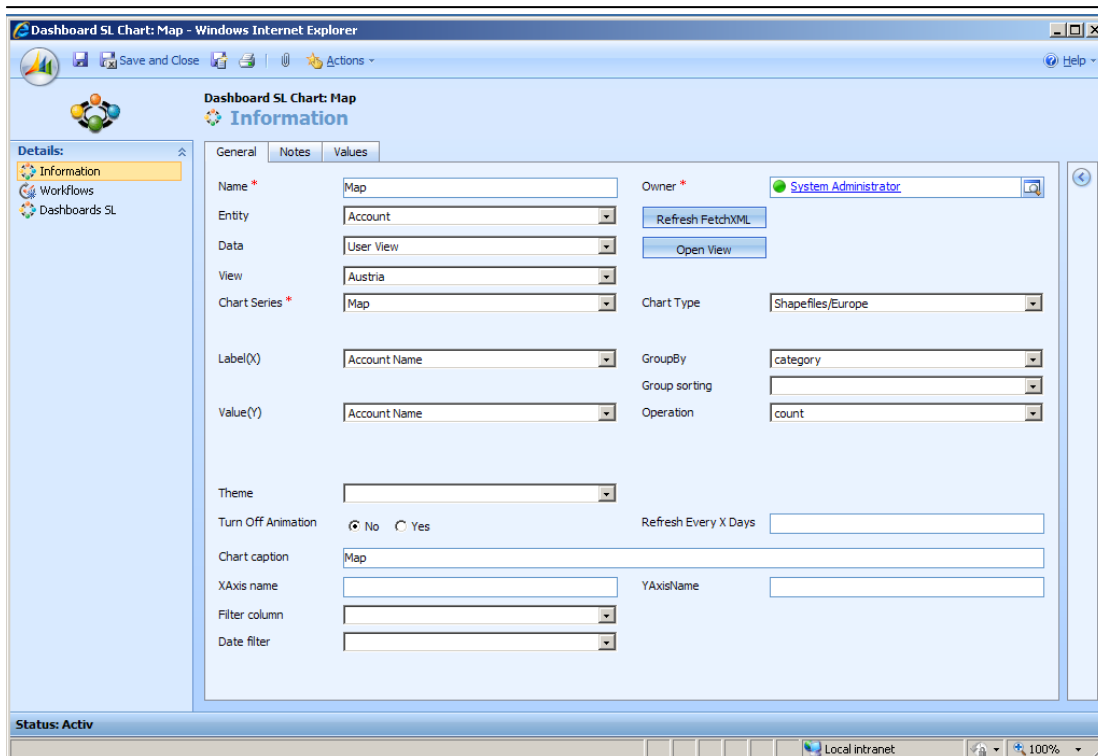
Chart Type: For example select "Area 2D"

Chart Caption: Fill in the title for the Chart.

GroupBy: Here you can select for example "category"

After Reloading the Dashboard you will see following chart.





Name: Fill in the name of the Chart

Entity: Select the entity. In our example it is (Incident this is the CRM internal name for Cases)

Data: Select the type of Advanced Find you want to use. In our example you can leave it on "User View"

View: For example select "Austria"

Chart Series: Now Select "Map"

Label: For example select the field "Account Name"

Value: For example select the field "Account Name"

Chart Type: For example select "Shapefiles/Europe"

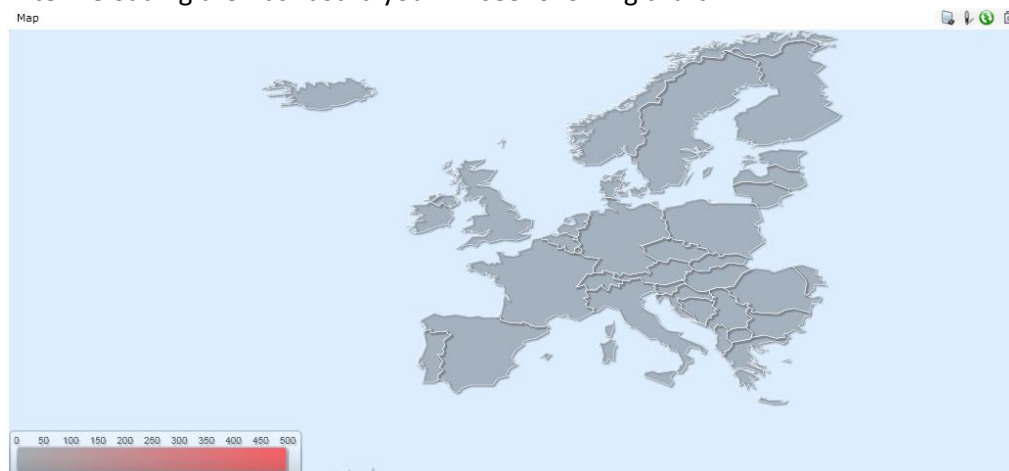
Operation: For example select "count"

Chart Caption: Fill in the title for the Chart.

GroupBy: Here you can select for example "category"

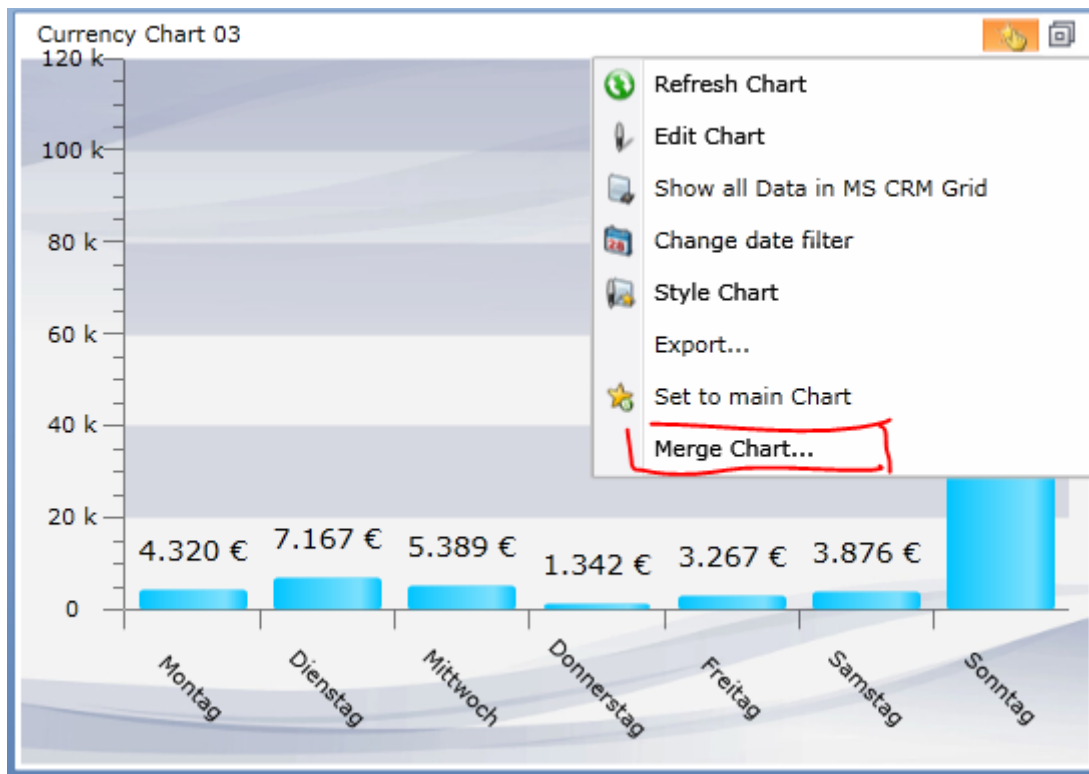
Series definition: For example select the field "Status Reason"

After Reloading the Dashboard you will see following chart.

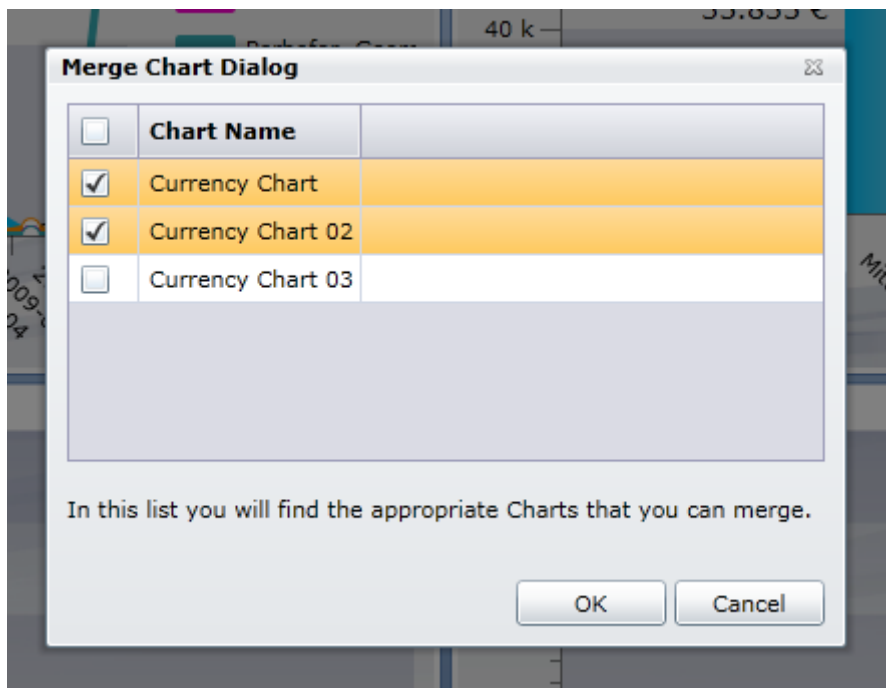


Merge Charts

You have the possibility to merge charts. Click on a chart menu and chose 'Merge Chart'.



If there are valid charts available to merge, you will see a new dialog with a list of charts. Select some charts and click OK.

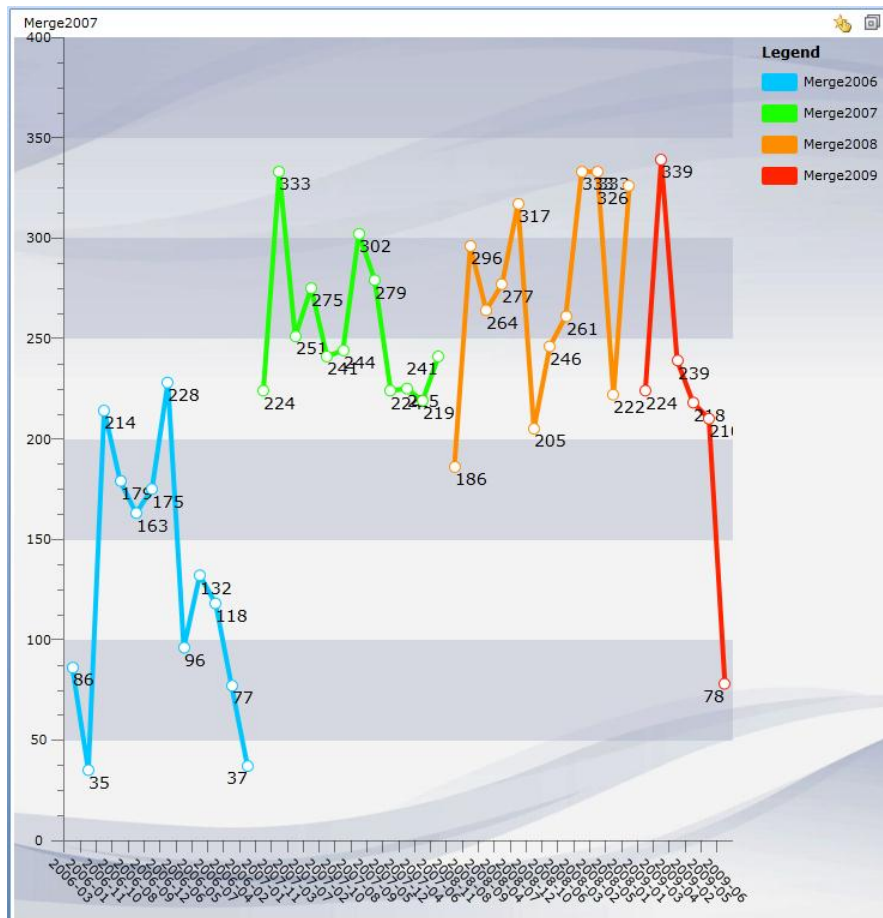


Now you get a merged chart.

Advice:

- You cannot merge a series chart but you can merge any single chart to a series chart.

- For correct ordered results you should set the 'Group sorting' value at the chart entity settings! ('Edit Chart' chart menu item)



Import and Export Charts and Dashboards

Thru the Import/Export functionality it is possible to import and/or export all Dashboards and Charts to an XML File. So it is very easy to export some charts/dashboards on one organization and import it on another.

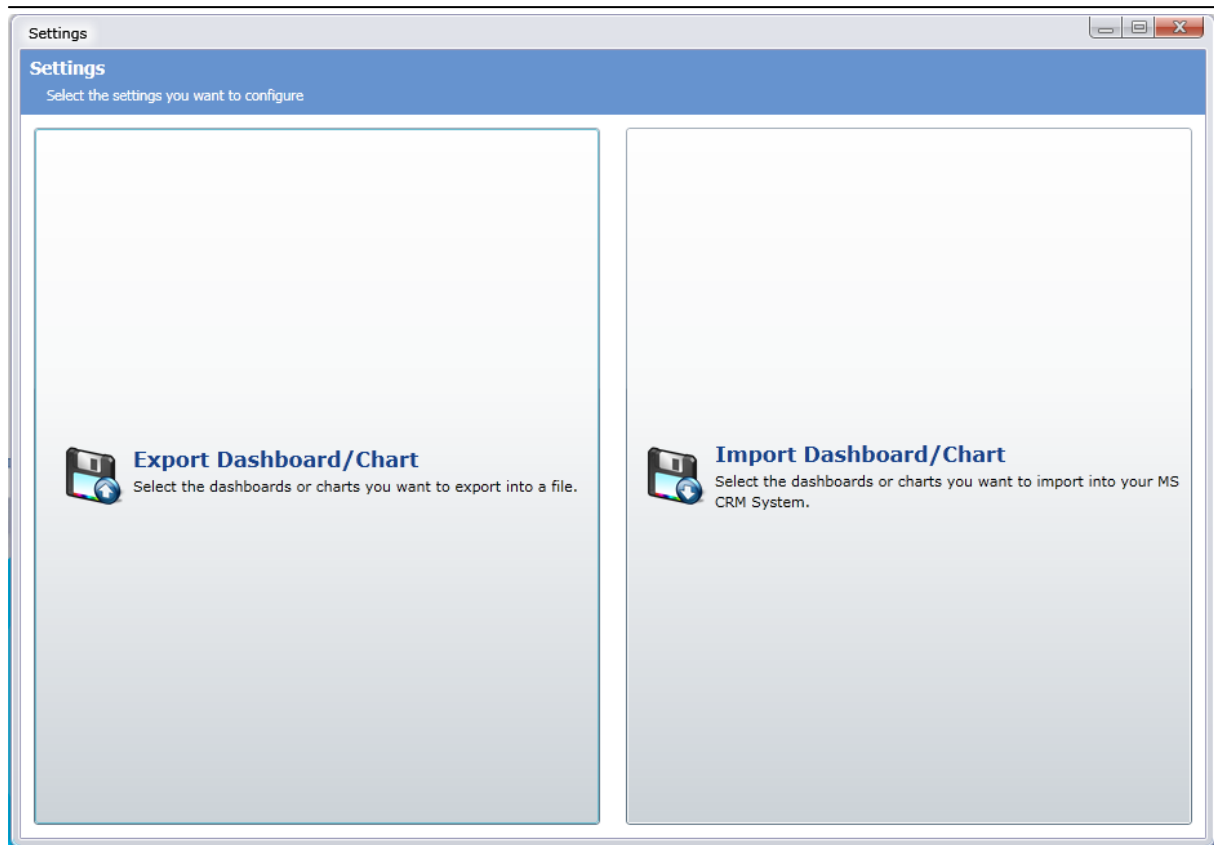
We differentiate in Import/Export into a general Dashboard and an entity specific Dashboard.

General Dashboards are Dashboards which containing Data from the whole CRM.

Entity specific Dashboards are Dashboards which are only containing Data from one Entity. For example all Invoices from an Account or all Opportunities of a Contact.

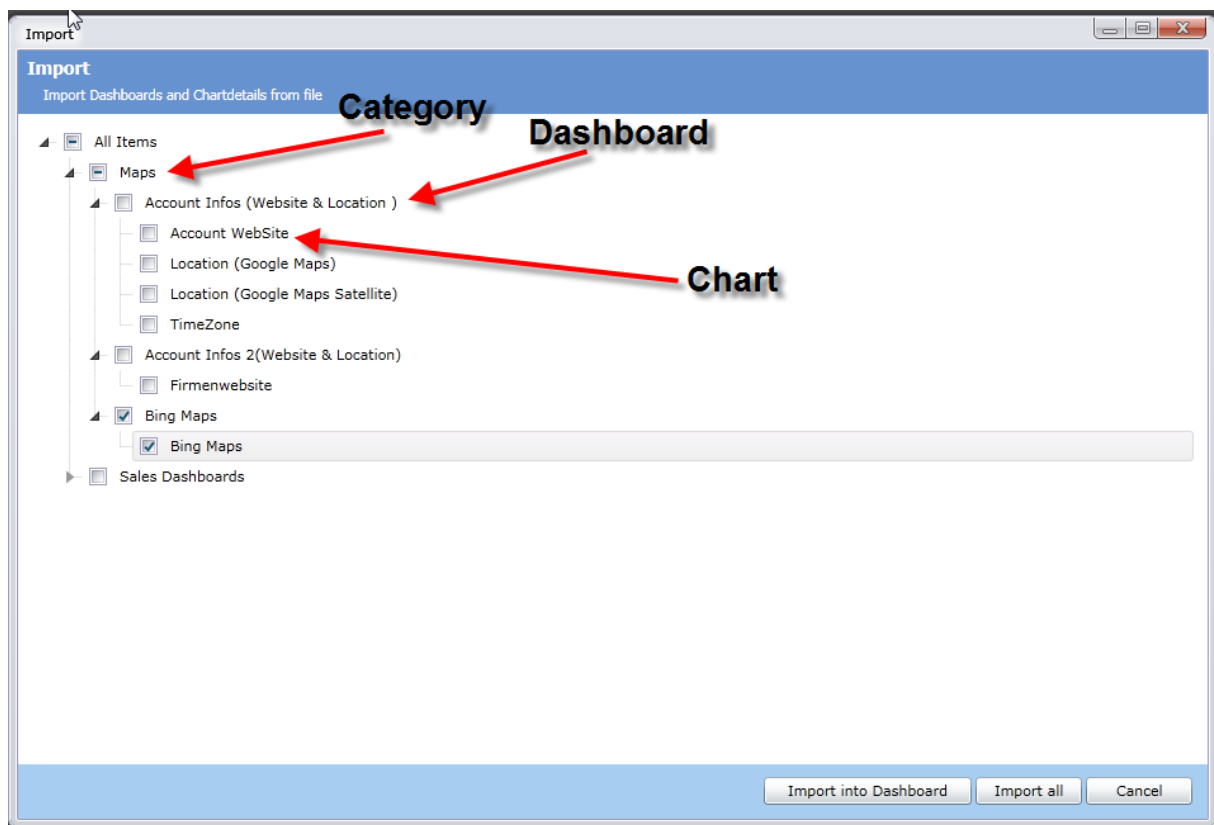
Import Charts and Dashboards

You have to click on the "Import/Export" Button in the Toolbar. If you want to import a specific Chart into an existing Dashboard you have to select the correct Dashboard before you click on the "Import/Export" Button.



After clicking on the "Import Dashboard/Chart"-Button you have to select a XML-File which contains the Dashboard/Chart which you want to import.

Now you get a tree of all Categories/Dashboards/Charts which are in this XML-File.



Now select which Dashboard/Chart you want to import.

There are 2 possibilities to import the Charts.

Import into Dashboard: with this button you are able to import a specific Chart into a Dashboard you already created.

Import all: this button creates a new Category and creates in this Category the Dashboard and the Charts.

Export Charts and Dashboards

To export a general Dashboard/Chart you have to open the general Dashboard and click on the "Import/Export" Button in the Toolbar.

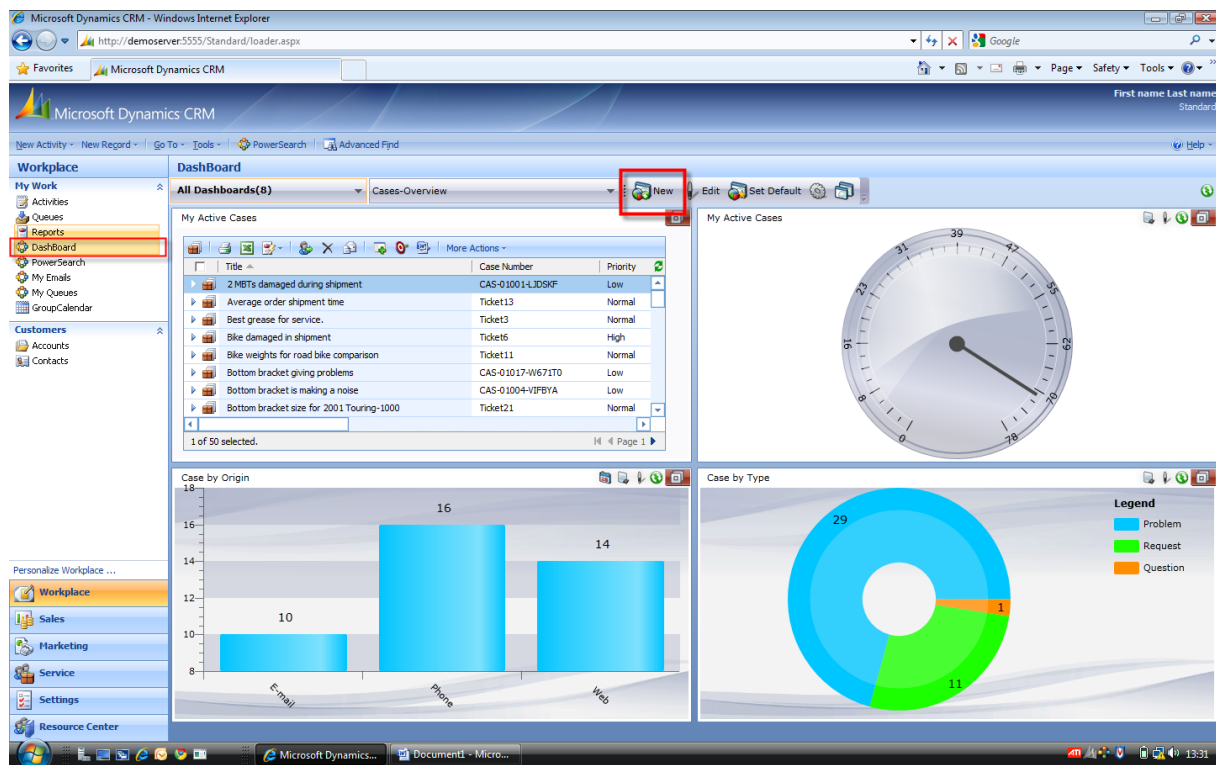
Click on the "Export Dashboard/Chart" – Button to export charts. Now you will see a tree with all the Categories/Dashboards and Charts. Select the all the items you want to export.

Click on the "Export" Button and select a file location and file name for the exported file.

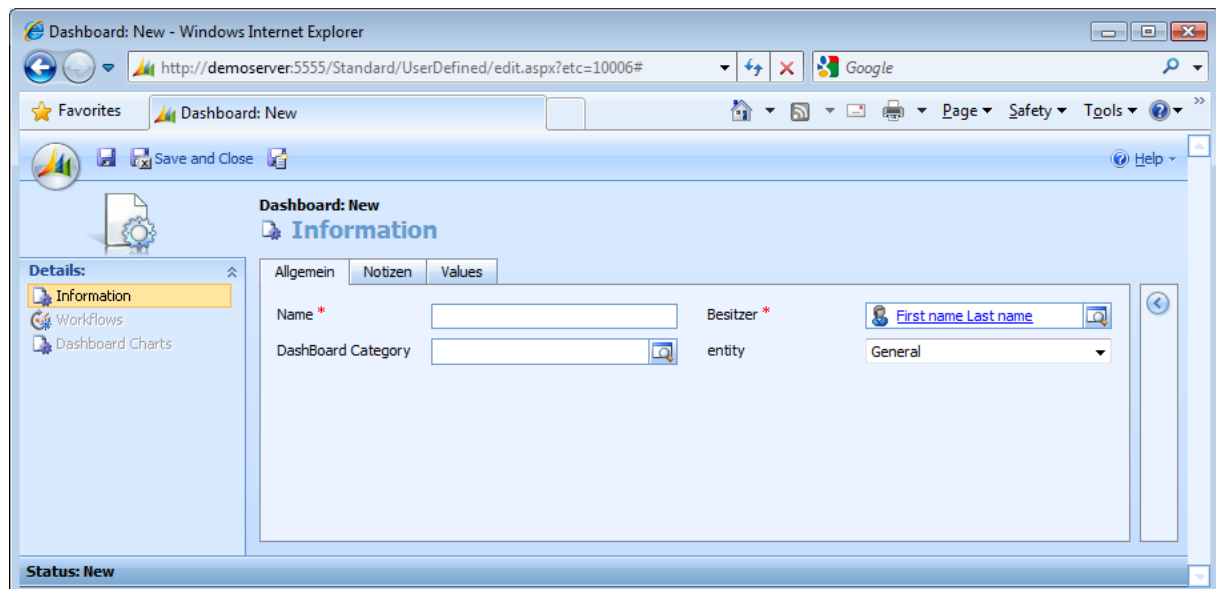
Attention: If you want to export entity specific Dashboards/Charts you have to navigate to the entity and open the Dashboard their and click on the "Import/Export" Button in the Toolbar.

How to generate a new general Dashboard

Open your MS CRM and click on Dashboard in the navigation bar:



Click on the “New” button on the toolbar and the Dashboard-form will open.

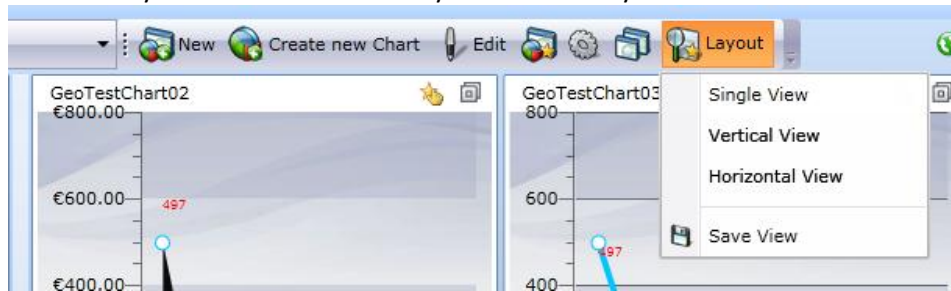


Fill in the Name of the Dashboard and select an existing Dashboard Category. Leave the value of the Entity field on “General”.

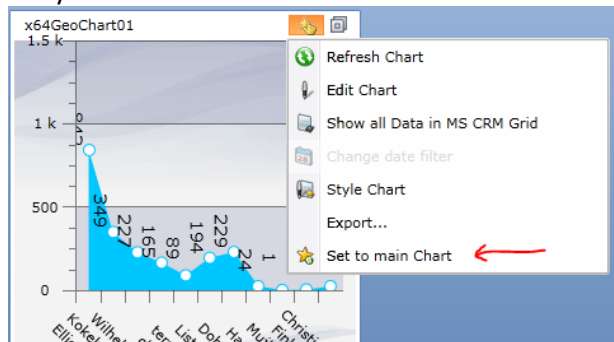
Click on “Save and Close” and reload the Dashboard. Your new Dashboard is available now.

Layout Mode (Chart View)

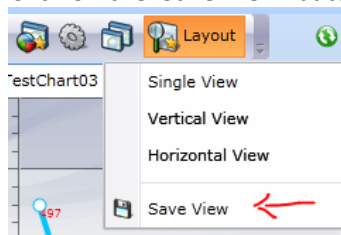
Click on 'Layout' in the menu to set your favorite Layout mode:



Set your favorite Chart to a main Chart:



Click on the 'Save View' button to save your custom layout to the Dashboard:



Advice:

If you are the owner of a Dashboard and you define and save a custom layout, other users get your saved Layout too. As long they save your own personal layout view.

Split Screen (Connect to relational Charts)

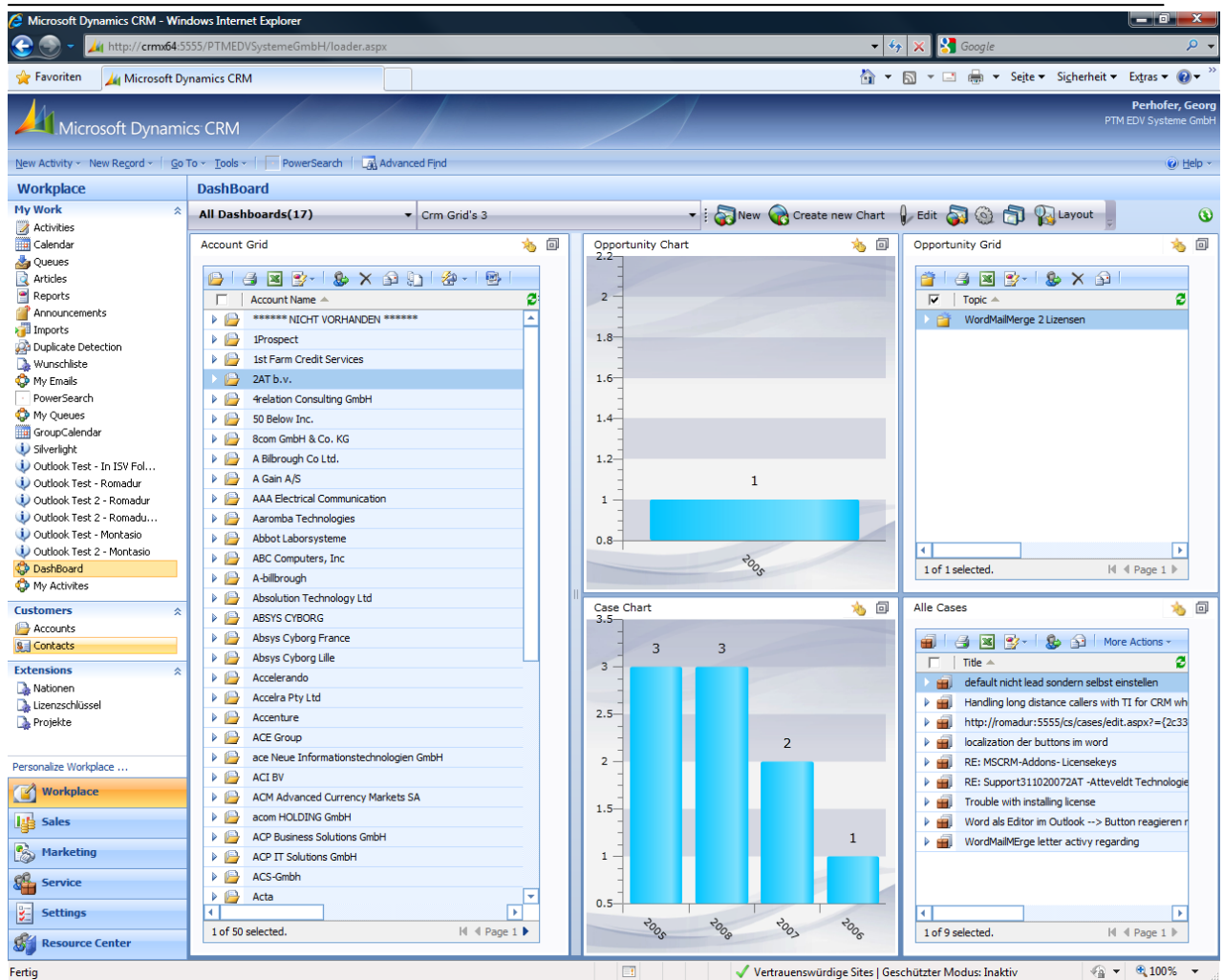
With this feature you can create relational Views. The prerequisite is a CRM-Grid Chart. If you select one item in this CRM-Grid other charts in this Dashboard will show relational data for this selected item.

Example:

At the left side there is a CRM-Grid with all Accounts. At the right are two opportunity Charts and two case Charts.

If you click on an Account at the CRM-Grid Chart, you will see the relational data to this Account on the right Charts.

We can see this Account has one opportunity and nine cases.



Setting up a Split Screen

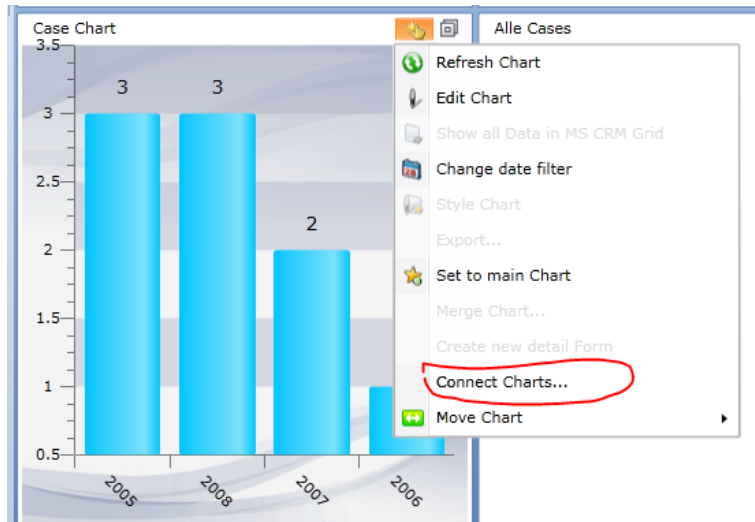
1. Create a default CRM-Grid Chart (for example with Accounts).
2. Create a Chart for Cases, important here is to set a 'Filter column'!

Filter column

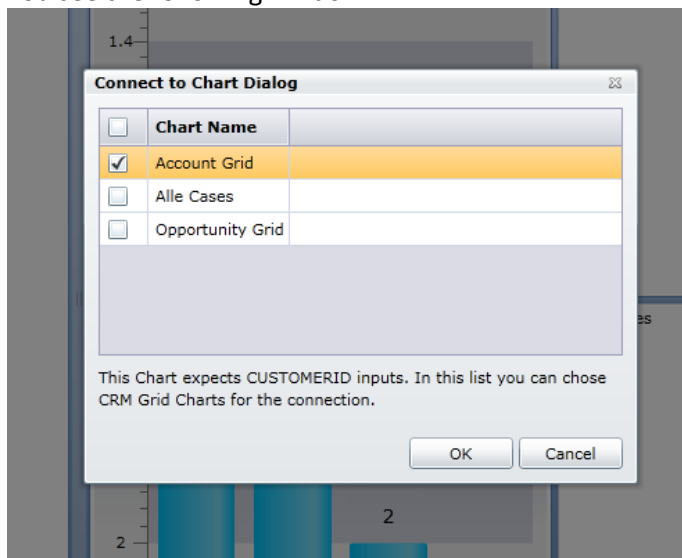
3. Now you have two charts in your Dashboard, the CRM-Grid with all accounts, and an empty Case Chart.

The next step is to connect these two Charts. Go to the Case Chart and click on 'Connect

Charts...!



4. You see the following window:

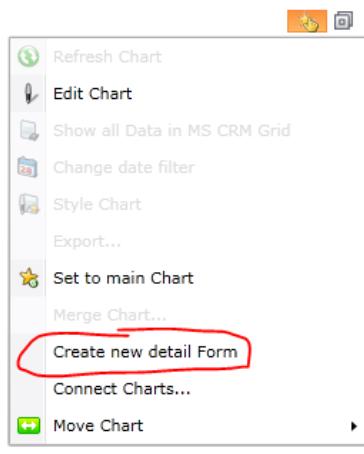


Here you can connect to the appropriate Charts. Choose you're created Account-Crm-Grid Chart. Click OK and select an Item in the Account Grid. Now you should get related items in the Case Chart. If not, has the selected item in the Account Grid Cases?

Setting up a Split-Screen Detail Form

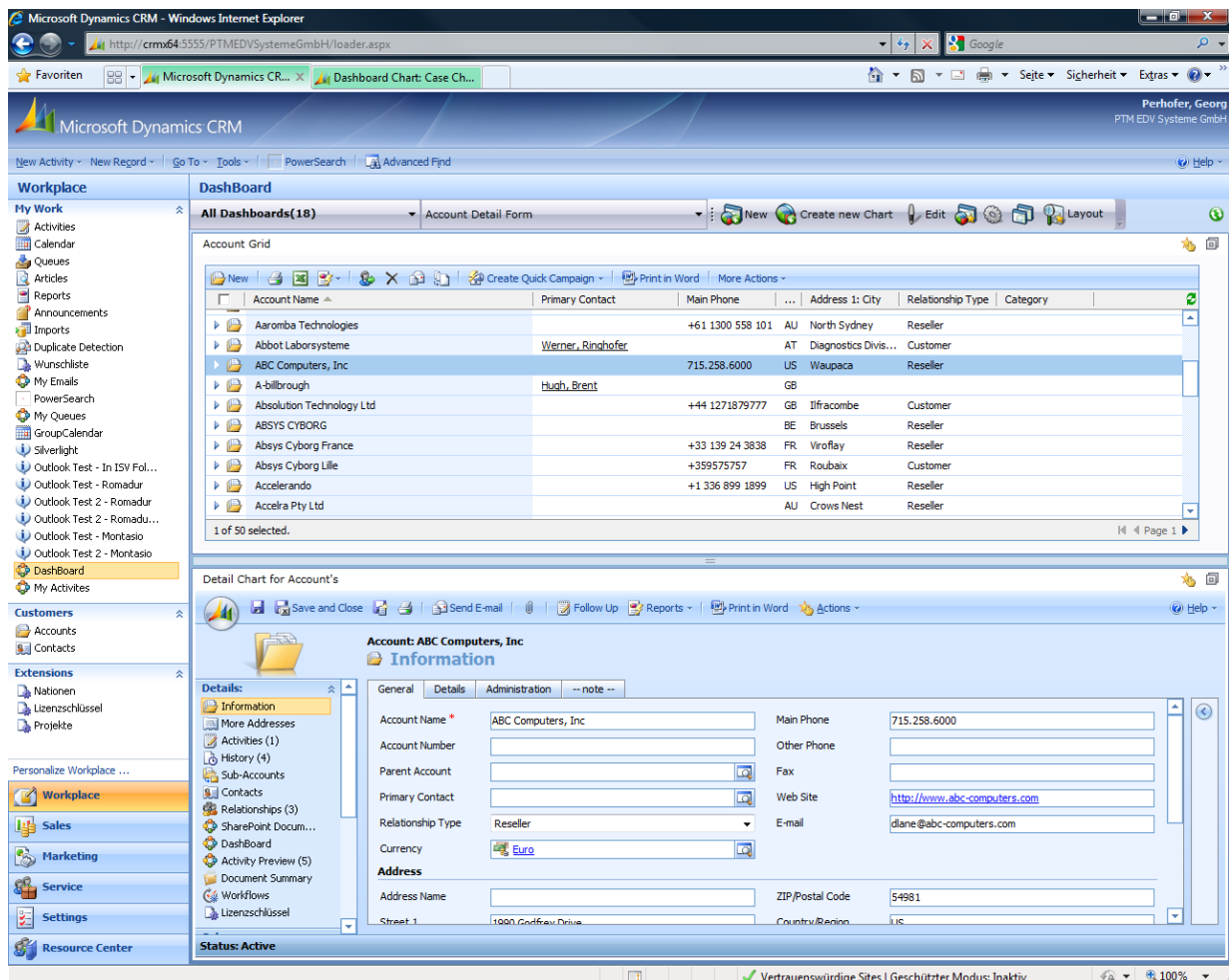
1. Create a Crm-Grid Chart (for example with Accounts)

2. In the Crm-Grid Menu click at 'Create new detail Form'



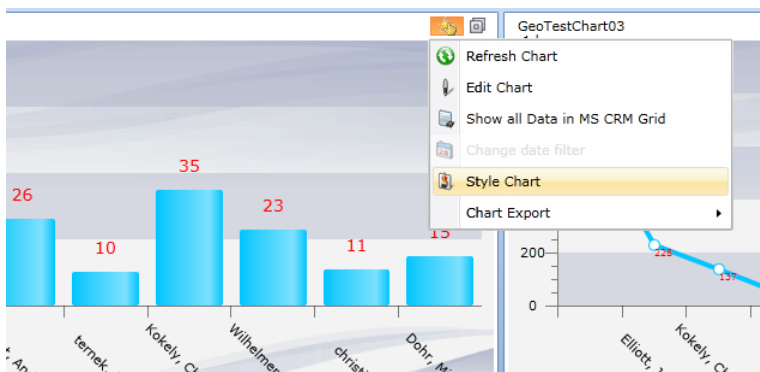
3. Now you get automatically a second Chart. Click on one item in the CRM-Grid Chart and you get detailed Info for this Selected Item in the new Chart.

Example Screen:

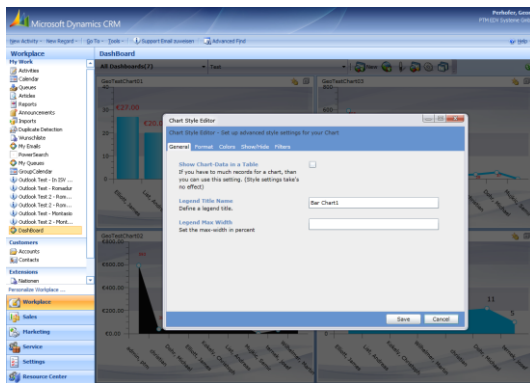


Style Chart

Set the font size; format the labels, set colors and more... in the Style-Editor. Click at the Chart action menu und choose "Style Chart".



After one click you will see this new Popup:



Descriptions to the Settings:

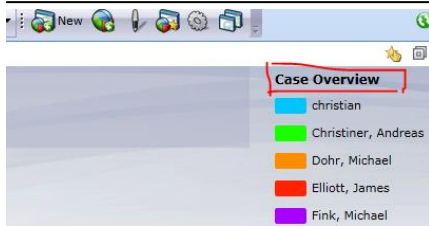
Tab General

Show Chart-Data in a Table - If you have a lot of data and the chart-area is to small for a neat display, you can use this option to show your data in a table instead a chart.

Value X	Value Y	Series
2008-11	48	Elliott, James
2009-05	36	Elliott, James
2008-12	48	Elliott, James
2008-03	62	Elliott, James
2009-04	42	Elliott, James
2008-10	60	Elliott, James
2008-08	58	Elliott, James
2008-04	77	Elliott, James
2008-07	71	Elliott, James
2008-05	52	Elliott, James

Show Chart-Data in a Table Sample

Legend Title Name - Here you can set a header if you have a multiple series chart or other appropriate charts.



Legend Title Name Sample

Legend Max Width - If you have very long legend names, here you can set the maximum width of the names area. For example 20 - this means you get 80% for the Chart and 20% for the legend titles.

Max Y Value - Set a maximum/fixed Y Value for the chart.

Min Y Value - Set a minimum/fixed Y Value for the chart.

Chart Order - Set the chart order by add a number.

Tab Format

Item Label Fontsize - Define a font size for the item labels.

Label Default Format - Here you can define a format for the item labels.

X-Axis default format - Here you can define a format for the X-axis values.

Y-Axis default format - Here you can define a format for the Y-axis values.

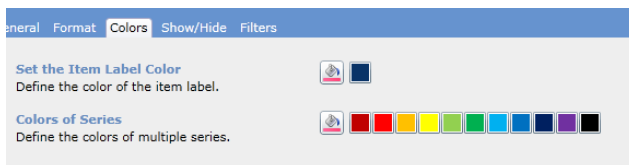
X-Axis Layout Mode - If you have a bar-chart you can define the desired layout mode.

Please look at <http://msdn.microsoft.com/en-us/library/dwhawy9k.aspx> to view all format options.

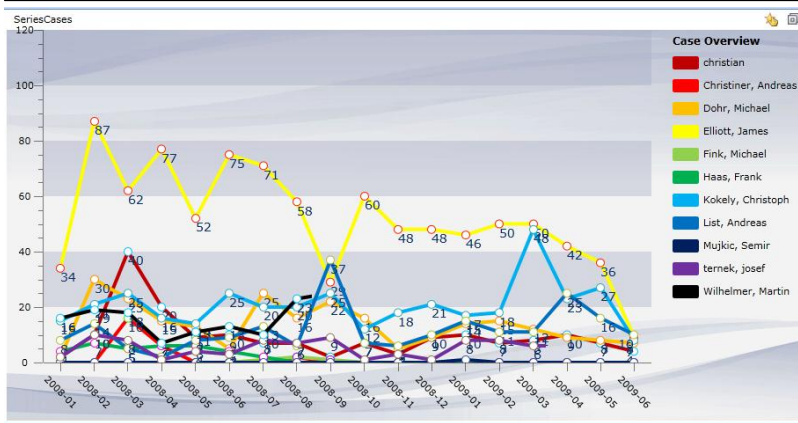
Tab Colors

Set the Item Label Color - Set a color for the item labels.

Colors of Series - Define the colors of multiple series.



Colors of Series Sample



Colors of Series Sample - Result

Colors of Chart Items - Define the colors of chart items addicted to the values. For example: Choose the red color and type the value '50' in the popup box. Save your settings and look at the chart, all items with values under 50 have the color red.



Colors of Chart Items Sample

Tab Show/Hide

Hide Legend Title - Check the checkbox to hide the legend title.

Show Sum Legend - Check this checkbox to see the sum value in the chart of all chart item values.



Show Sum Legend Sample

Show Vertical Label - Check this checkbox to make the vertical labels visible.

Show Grid Lines - Make the vertical grid lines visible.

Tab Filters

Time Filter - Define two times and you get the values between these times.

Only Values Between - Define two values and you get the values between this values.

Show only Top Values - Shows only the latest **top-X** results.

Contact

If you have problems with the product send a Email to support@mscrm-addons.com or call +43 316 680 880 0