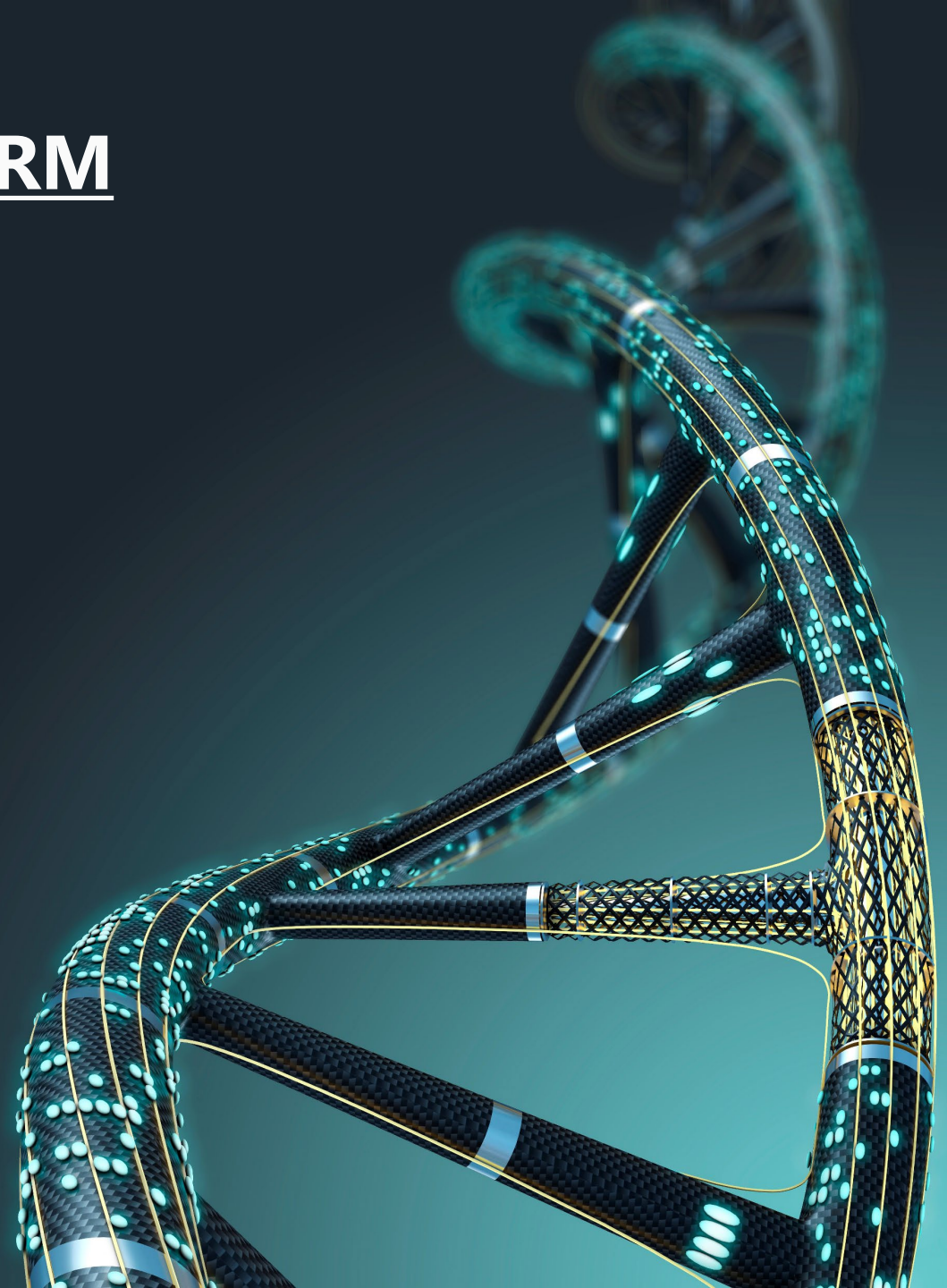


Webinar: Power Hub for CRM

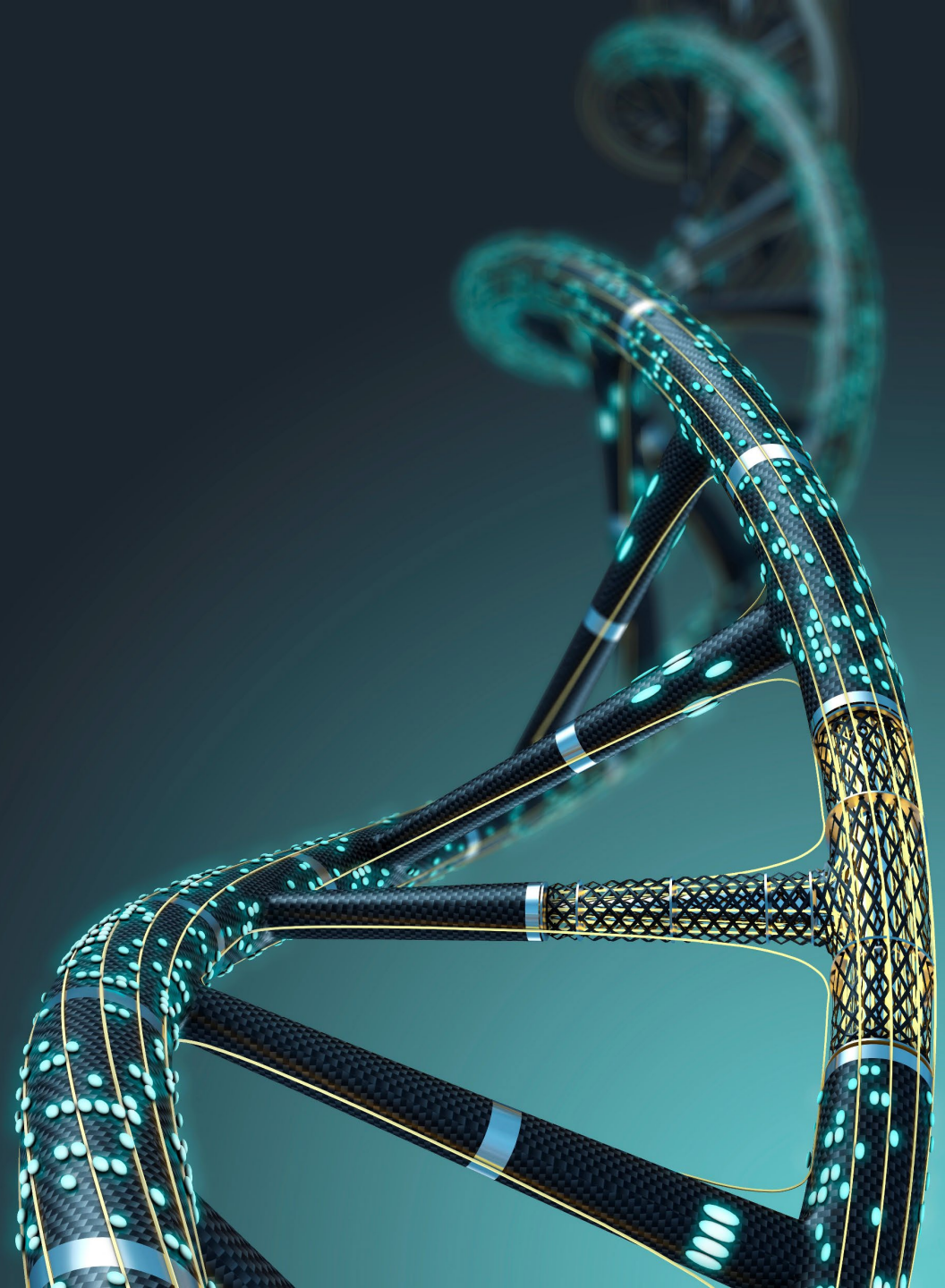
**Vi starter
om et
øjeblik**





D365 Power Hub for CRM

Better decision-making through
structured & accessible historical data



AGENDA

Tid	Indhold
09.00	Welcome
09.05	Introduction to Delegate
09.15	Why Power Hub for CRM
09:20	Demo of Power Hub for CRM
09:35	Implementing Power Hub for CRM
09.40	Q&A



Søren Andersen



Morten Fritsch





Who is Delegate –

a broad horizon company

Delegate is based on a promise to our employees & customers. **We strive to be the best workplace for our employees and the preferred vendor for our customers.**

Delegate delivers digital transformation services. **We build mission critical solutions for our customer based on Microsoft technology.**

Delegate is part of Broad Horizon a pan European IT company based out of the Netherlands and backed by EMK, a Private Equity Fund, based in London.

180+ employees



Nr. 1



D365



- Digital Selling
- Sales Excellence
- Customer lifecycle
- Customer Service
- Customer Portal
- Customer Insights
- Marketing

M365



- Teams
- Document Governance
- Project Mgt.
- Contract Mgt.
- Intranet
- Governance
- Platform Administration

AZURE



- Smart factory / IIoT
- Data Platform
- Integration Platform
- AI
- Data Warehouse
- Business Intelligence
- Custom Development

We are proud of...



The proud winner of **Low Code Development**

In recognition of extraordinary results
Microsoft Denmark are proud to appoint
Delegate

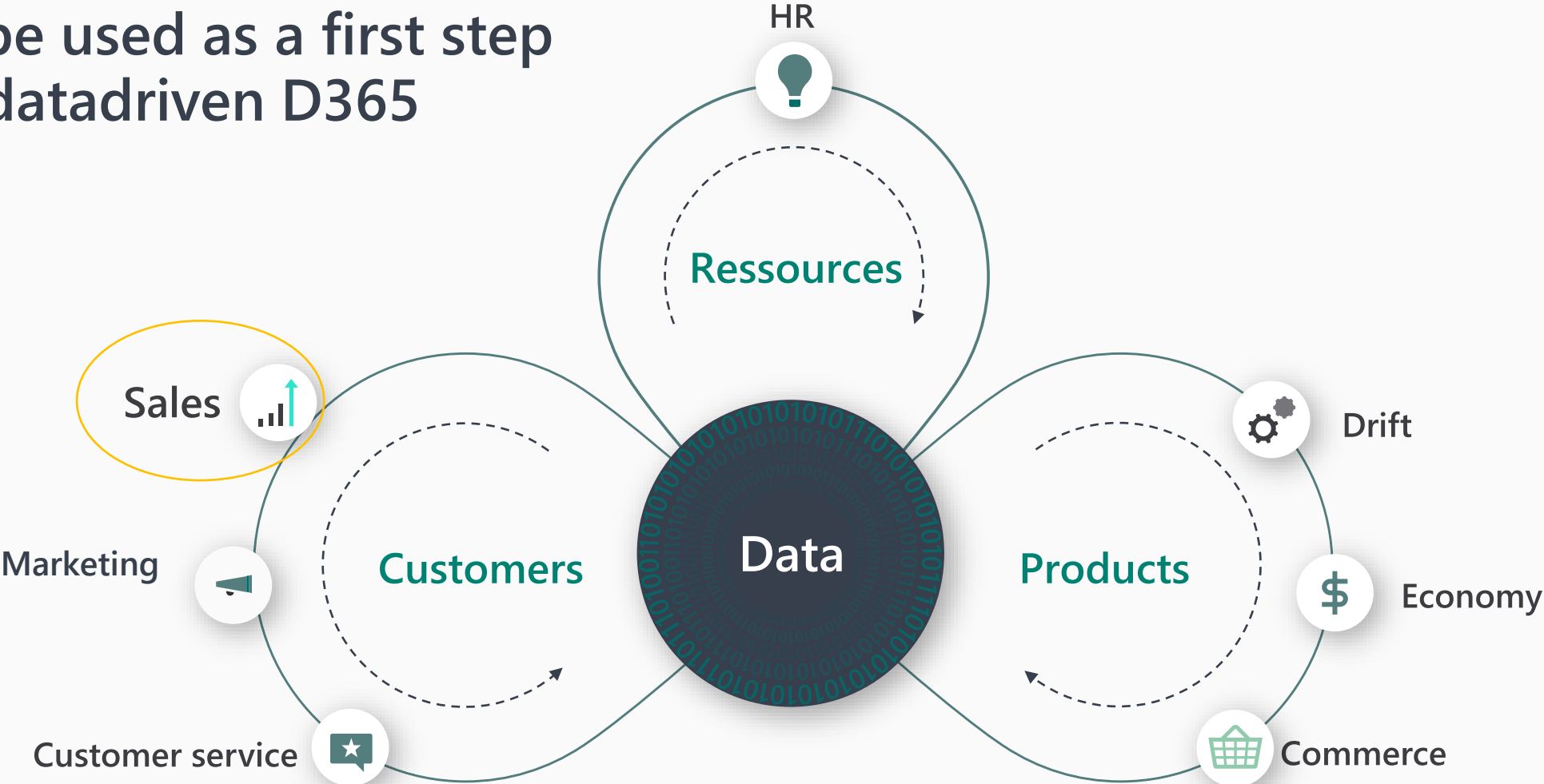


The proud winner of **Data & AI**

In recognition of extraordinary results
Microsoft Denmark are proud to appoint
Delegate



Dynamics 365 Power Hub for CRM can be used as a first step for a real datadriven D365 platform



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Why Power Hub:



Using historical data gives valuable insights into how and when trends occur. It gives business insights to special focus areas and highlight issues that might not have been seen with-out historical data. Feelings becomes facts and decisions is based on reliable data.



D365 do not store historical data for easy reporting thus Power Hub for CRM fulfils this GAP



Dynamics 365 Power Hub for CRM helps companies get better insights into D365 history:



Taps into D365 and records data that creates a detailed historical overview



Foundation for improved reporting and comparison



Historical data helps sales looking for trends and forecasting



Historical data can be used to better predict "future" trends ie. forecasting





Power Hub for CRM provides:



A cloud based scalable solution



Basic reporting setup in Power BI on pipeline



Builds history day one after installation and over time provide more and more details in reporting scenarios



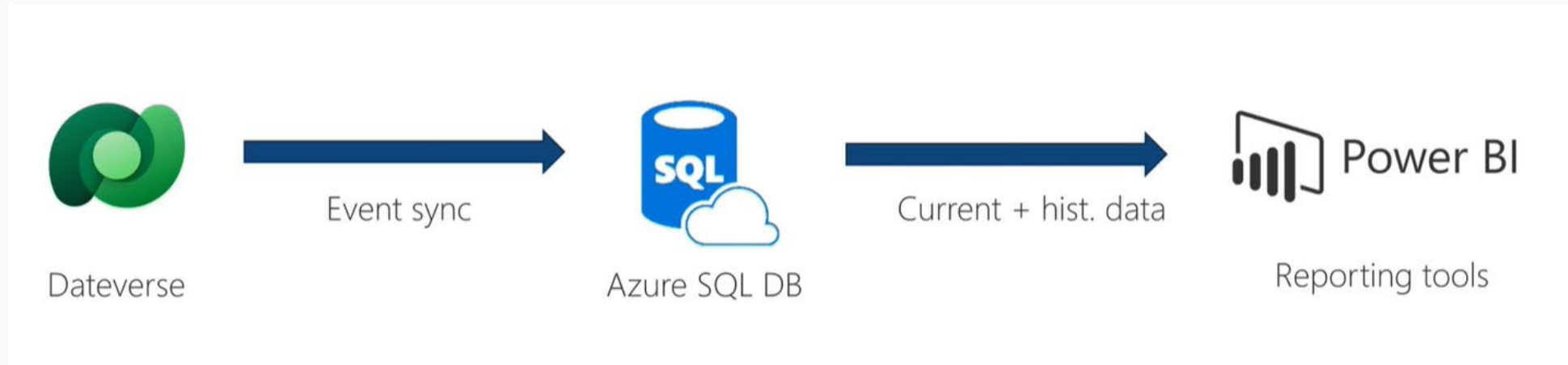
Ready for advanced predictions that will improve as historical data is gathered



Everyday use for Power Hub for CRM:

- Snapshots – how did my report look last month (scheduled or triggered)
- Baselines – freeze data to enable baseline comparison
- Highlight changes to special focus areas (ex. Postponed dates)
- Trend analysis – how has the numbers evolved over time
- Pipeline – Evolvement over time on products, people, segments etc.

Implementation Overview



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Demo of Powerhub for CRM

Standard dashboards in CRM

PowerBI on Power hub for CRM data

Configuration portal



Self-service web portal to manage access and configuration

Manage users
Add more sources as they become available

The screenshot shows the 'power hub' interface. On the left is a navigation menu with 'Sources' selected. The main area is titled 'Sources' and contains a '+ New Source' button and a card for 'Delegate AS'. The card lists the following details:

- ID: 1
- Type: CDS
- URL: https://delegate.crm4.dynamics.com/
- Schema: CRM
- Description: (empty)

To the right of the card is a table of configuration options:

	Portal admin	DB Owner	Delegate AS (CRM)
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Standard reports ready for historic data

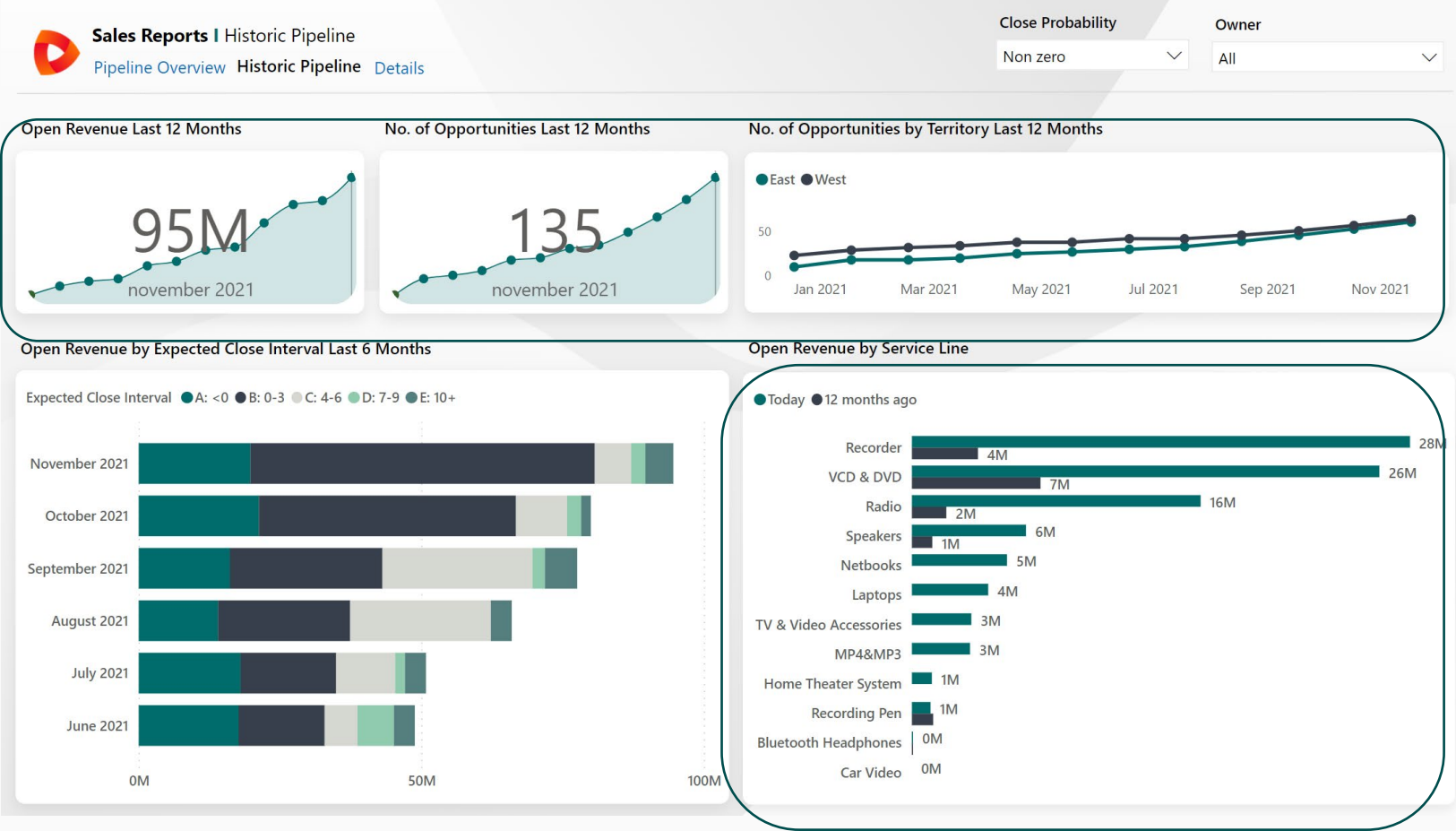
Configuration Portal

Delegate AS

[Back to sources](#) **Tables** [Statistics](#) [Source config](#)

System name ↑	Display name	Description	Managed	Custom	Many to many	Sync enabled	Reporting views enabled
aaduser	AAD User	Virtual entity that represents AAD u...	✓	✓		<input type="checkbox"/>	<input type="checkbox"/>
account	Account	Person with whom a business unit h...	✓			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
accountleads	AccountLeads	description.	✓		✓	<input type="checkbox"/>	<input type="checkbox"/>
aciviewmapper	ACIViewMapper	Customized messages for an entity ...	✓			<input type="checkbox"/>	<input type="checkbox"/>
actioncard	Action Card	Action card entity to show action ca...	✓			<input type="checkbox"/>	<input type="checkbox"/>
actioncardusersettings	Action Card User Settings	Stores user settings for action cards	✓			<input type="checkbox"/>	<input type="checkbox"/>
actioncarduserstate	ActionCardUserState		✓			<input type="checkbox"/>	<input type="checkbox"/>
activityfileattachment	Activity File Attachment	Attachment entity with data stored i...	✓	✓		<input checked="" type="checkbox"/>	<input type="checkbox"/>
activitymimeattachment	Attachment	MIME attachment for an activity.	✓			<input type="checkbox"/>	<input type="checkbox"/>

Standard reports ready for historic data



Analytics examples

Changes over time

Compare today to last year (or another period)

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Søren Andersen

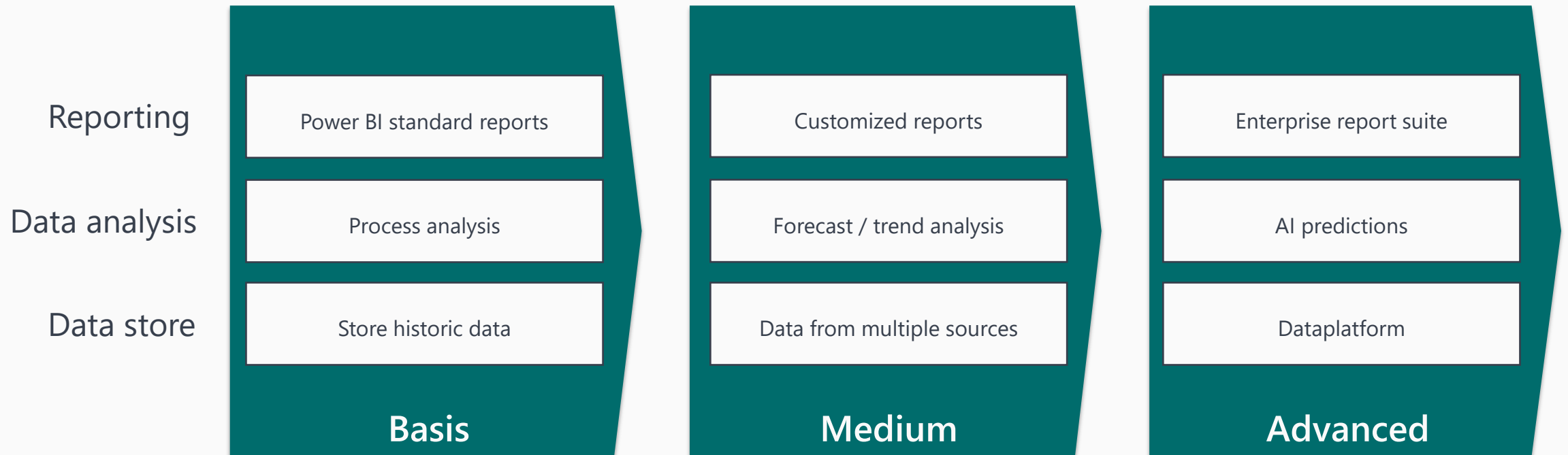


Morten Fritsch

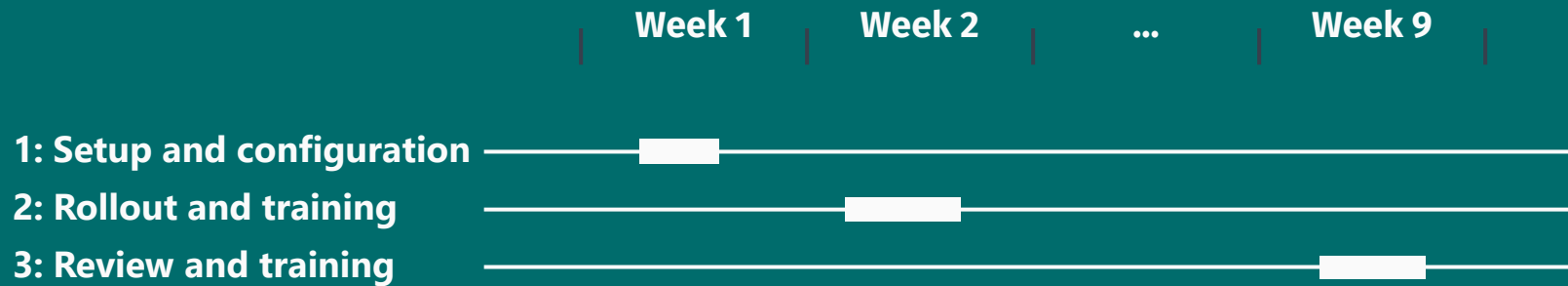


Different needs – different models

Delegate has built capability models that customers can mix and choose from Basis to Advanced.



Timeline for Basis implementation



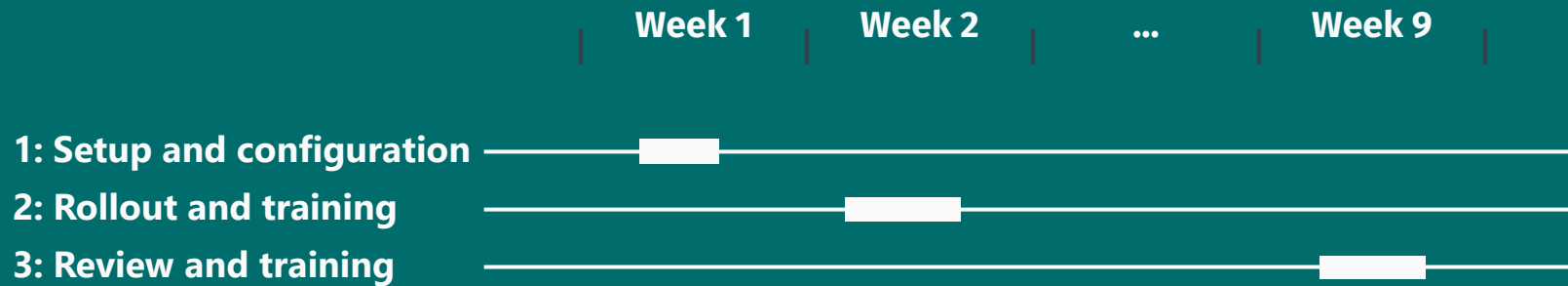
After basis install you have:

- Sync of report-relevant data to Azure Database
- Automatic capture of data changes
- Self-service web portal to manage access and configuration
- Standard reports ready for historic data

Which enables you to:

- Analyze data for historical trends, changes and processes
- Build a foundation for AI, advanced analytics and predictions
- Easily create your own Power BI reports based on historical data

Timeline for Basis implementation



Power Hub for CRM price:

- Power Hub for CRM: 6000 DKK pr. month
- Excluding Azure consumption approx. 150 – 400 USD pr. month
- Requires Power BI and a Azure subscription

Basis setup:

- Basis consulting fee: 47.500 DKK

Q & A





delegat

D365 Power Hub for CRM

Mange tak for jeres tid!

Reach out to Søren:

Email: san@delegat.dk

Reach out to Morten:

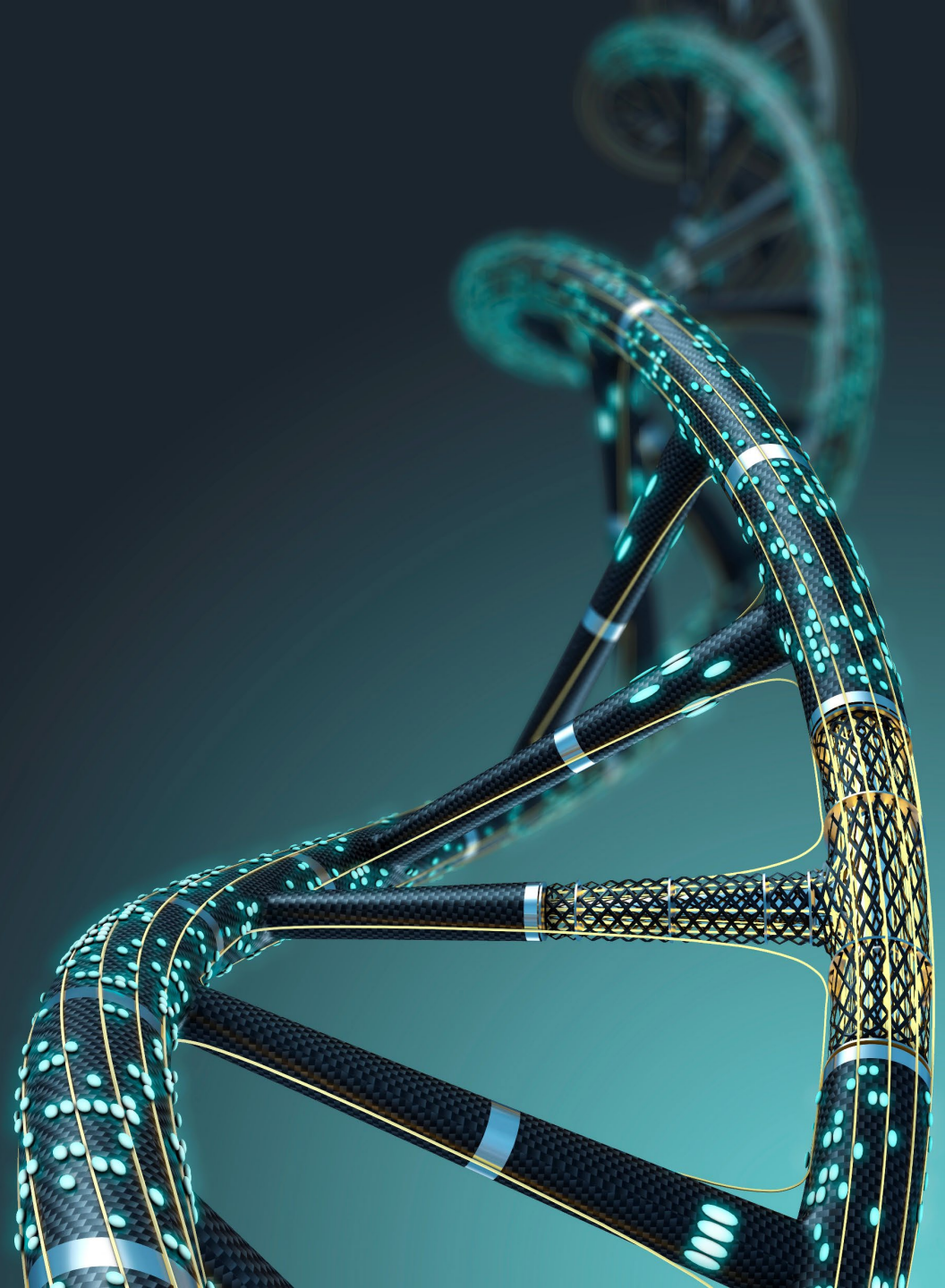
Email: mfr@delegat.dk





D365 Power Hub for
CRM

Behind the scenes

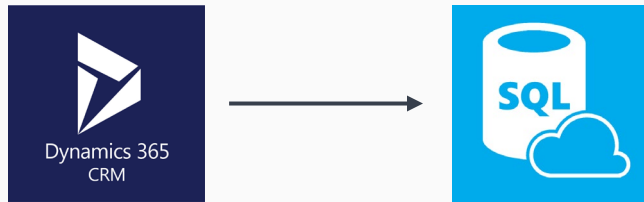


Sync of report-relevant data to Azure Database

Choose what tables to sync and create views for reporting

System name ↑	Display name	Description	Managed	Custom	Many to many	Sync enabled	Reporting views enabled
account	Account	Person with whom a business unit h...	✓			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
accountleads	AccountLeads	description.	✓		✓	<input type="checkbox"/>	<input type="checkbox"/>
aciviewmapper	ACIViewMapper	Customized messages for an entity ...	✓			<input type="checkbox"/>	<input type="checkbox"/>

Data will be synced from Dynamics 365 to Azure Database



- Automatic capture of data changes
- Self-service web portal to manage access and configuration
- Standard reports ready for historic data

Automatic capture of data changes

New values

Opportunity	Est. revenue
Opportunity 1	850.000
Opportunity 2	100.000



When a change is made in the source (for example CRM)

Historic values

Opportunity	Est. revenue	ValidFrom	ValidTo
Opportunity 1	500.000	2021-08-17	2021-11-09
Opportunity 1	850.000	2021-11-10	9999-12-31
Opportunity 2	50.000	2021-06-08	2021-10-22
Opportunity 2	100.000	2021-10-23	9999-12-31

The change is stored in history table along with all other historic values

- Self-service web portal to manage access and configuration
- Standard reports ready for historic data