solver

BI360

BI360 Suite and Dynamics CRM

A Solver White Paper

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Introduction

The purpose of this document is to describe the integration between Microsoft CRM and BI360, as well as to provide examples of pre-defined BI360 report templates that show some of the output capabilities.

Note: The BI360 Excel-based report writer is not only easy to use but it is also one of the most powerful reporting tools on the market. This white paper describes the live (real time) integration between BI360 and MS CRM and related report templates. If you would like to combine CRM data with your other data sources, another option is load CRM data into the BI360 Data Warehouse where it can be combined with e.g. actual sales data, general ledger financial data, payroll data, etc., and you will then benefit from a truly unified Business Intelligence solution. Please see *www.solverglobal.com* for more information.

Advantages of BI360 Reporting for MS CRM

Just like BI360 has an extensive, live integration to every Microsoft Dynamics ERP system, it also has a major, live integration to the MS CRM database. This gives you several benefits:

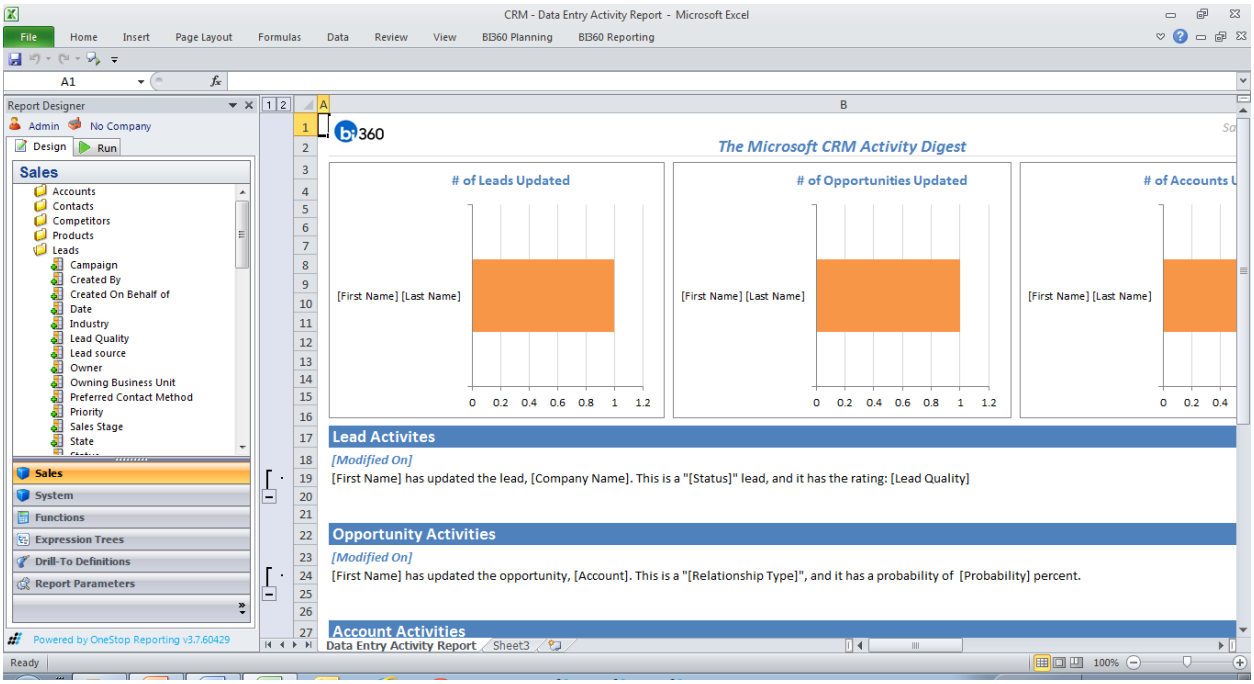
- Flexible, user-friendly Excel-based report writer for your CRM data.
- Run reports on demand from Excel, web or auto-distribute reports by e-mail.
- Any entries in MS CRM are immediately available in BI360 reports with no delaying transfer to OLAP cubes or external systems.
- Install BI360, download pre-built CRM report templates and in less than 5 minutes start seeing your CRM data in ways you have never been able to before.
- Integration is out-of-the-box, plus there is an interface to add custom CRM fields should that be needed.
- Pre-joined tables across CRM (e.g. Owner, Account, etc.)
- Pre-defined period logic (CRM date fields linked to weeks/months/etc. for easy reporting on e.g. trends, month-to-date, year-to-date, etc.)
- Get increased visibility and control of your CRM data and at the same time watch the sales team quickly become motivated to capture updated data in CRM due to vastly improved reporting output.
- See the screenshots later in this document to get an idea of reporting capabilities, including charting, traffic lights, narrative reports and more.

BI360 Integration to MS CRM

BI360 currently is delivered with out-of-the box integration to the following CRM modules:

- Accounts
- Contacts
- Opportunities
- Leads
- Campaigns
- Competitors
- Products
- Quotes
- Sales Orders

The following screenshots show some of these integration points as seen in the BI360 report writer when you design reports.



Frequently Asked Questions about the MS CRM Integration

Question	Answer
Which modules in MS CRM are available in the integration?	• Accounts • Contacts • Opportunity • Lead • Campaign • Service More modules can be added based on demand.
What about custom fields in MS CRM, how do you integrate them?	The BI360 Integration Customization interface provides access to add custom tables, fields and views in CRM.
How fast will it download data from MS CRM?	No download needed. BI360 reports run real-time on CRM.
What if I want to report simultaneously on CRM as well as other data sources?	You have two options for this: 1) Insert a SQL view in the other data source (e.g. in your ERP system if it is integrated to BI360) or in CRM pointing to the other data source. 2) Populate the BI360 Data Warehouse with both CRM and the other data source (e.g. actual sales, general ledger data, payroll data, etc.) and then use BI360 Reporting on the data warehouse.
Can BI360 also be hosted like MS CRM?	Yes, there are several hosting providers for BI360 or you can install it in-house. Note: For live reporting, BI360 should be installed in the same location as MS CRM.
Is BI360 available on SaaS pricing?	Yes, BI360 is available both on SaaS pricing or it can be purchased.
What type of CRM reports can I build with BI360?	You can build any kind of report within the limitations of Excel. In other words, you can do from simple to very advanced calculations, charting, exception highlighting, flexible formatting and any other feature you know in Excel.
Which versions of MS CRM are supported?	MS CRM 2011 and newer.

Options for Reporting, Planning and Dashboards

For the live reporting on MS CRM, you can utilize any of the tools in 1) and 3) below. Should you choose to upload CRM data to the BI360 Data Warehouse, then you also have 2) below as an option:

1) Reporting
    a. Formatted reports (see examples later in this document)
    b. Ad-hoc reports
    c. Report scheduling and distribution
    d. Web-based reporting
2) Planning
    a. Budget input (e.g. a revenue budget)
    b. Forecast input (e.g. a sales forecasts)
    c. Any other manual data entry form
3) Dashboard
    a. Sales dashboards
    b. Financial dashboards
    c. Other dashboards

Please see www.solverglobal.com for more detailed BI360 product information.

Report Examples

The following reports in this document are examples as well as out-of-the-box BI360 Excel-based report templates that you can download and use immediately with BI360 Reporting. Of course, you can also use the BI360 Excel-based Reporting module to design your own reports any way you would like them.

Keep in mind that once reports have been designed (or you use the pre-defined reports) you have many deployment options:

- Run reports with BI360's Excel-based reporting tool.
- Run reports with BI360's web portal.
- Use the BI360 Report Publisher for automatic scheduling and distribution to your team. Recipients (e.g. your sales team) of reports do NOT need a BI360 license.
- Publish reports to BI360 Insight (web-based collaboration portal), where users can access them and start discussions and share ideas.

One of the strongest advantages you will get from using the BI360 Reporting module on MS CRM is that you now get the best of a report writer (calculation ability, strong layout, any detail/summary desired) combined with certain dashboard advantages (charts, traffic lights, key figures, etc.), all in a Microsoft Excel environment that most users have the background to learn without any special technical skills.

Report 1 - Campaign Efficiency Report

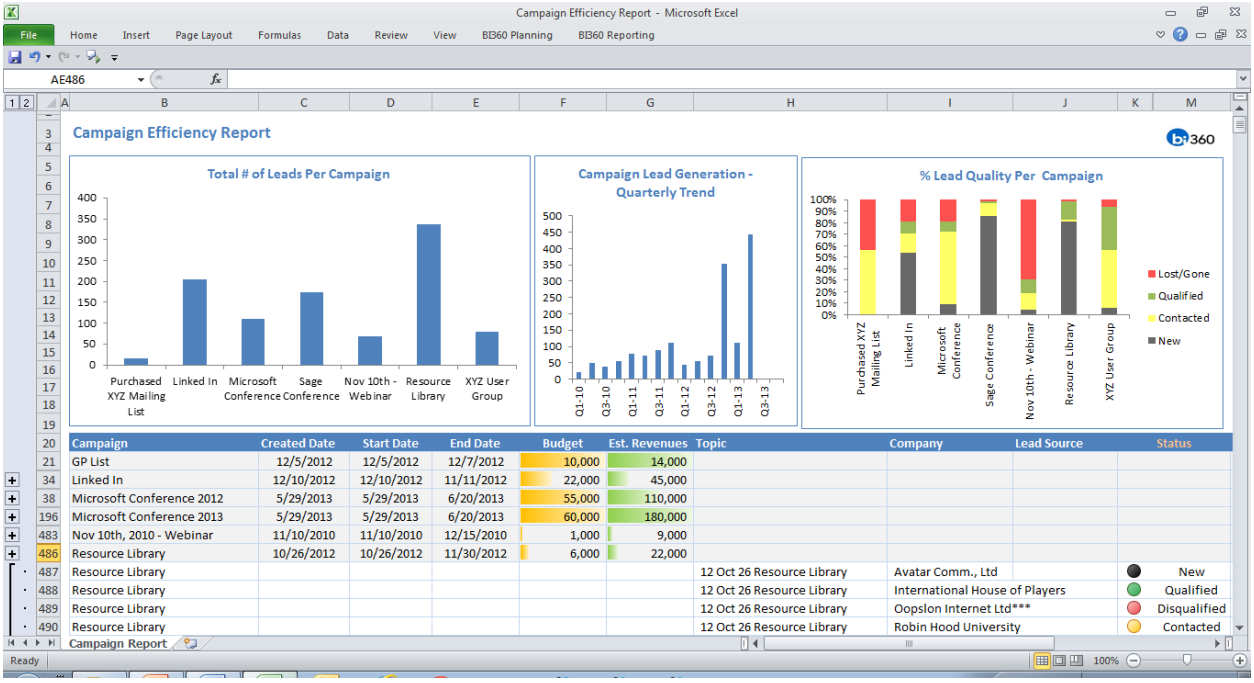
This report is designed for the marketing team to get a complete picture of how many leads each of their campaigns produce (see top left chart).

Furthermore, it provides lead count per quarter to see if their lead generation efforts are trending up or down over time (see middle cart below). For example, if the company is growing, or is planning to grow, their campaigns should be generating increasingly more leads over time. If not, the sales team is likely to run out of leads to hit their sales targets.

Finally, the chart to the rigth below shows the marketing team the quality of the leads that their campaigns are producing. You want to see as much green in the column charts as possible as that means the leads were qualified. A lot of red means that the campaign produced a high number of unqualified leads.

Ultimately, this report will help guide the marketing team to make increasingly more informed decisions about where to spend their campaign budgets and efforts, ultimately having a direct impact on the company's future sales.

Below the charts, the report has full lead detail, grouped by marketing campaign. This section includes in-cell charts, traffic lights, and other special features. Advanced count functions provide the statistics for the charts above. Cost and revenue per campaign is entered in MS CRM and can be seen in the middle of the lower section of the report.



Report 2 - Lead Activity Report

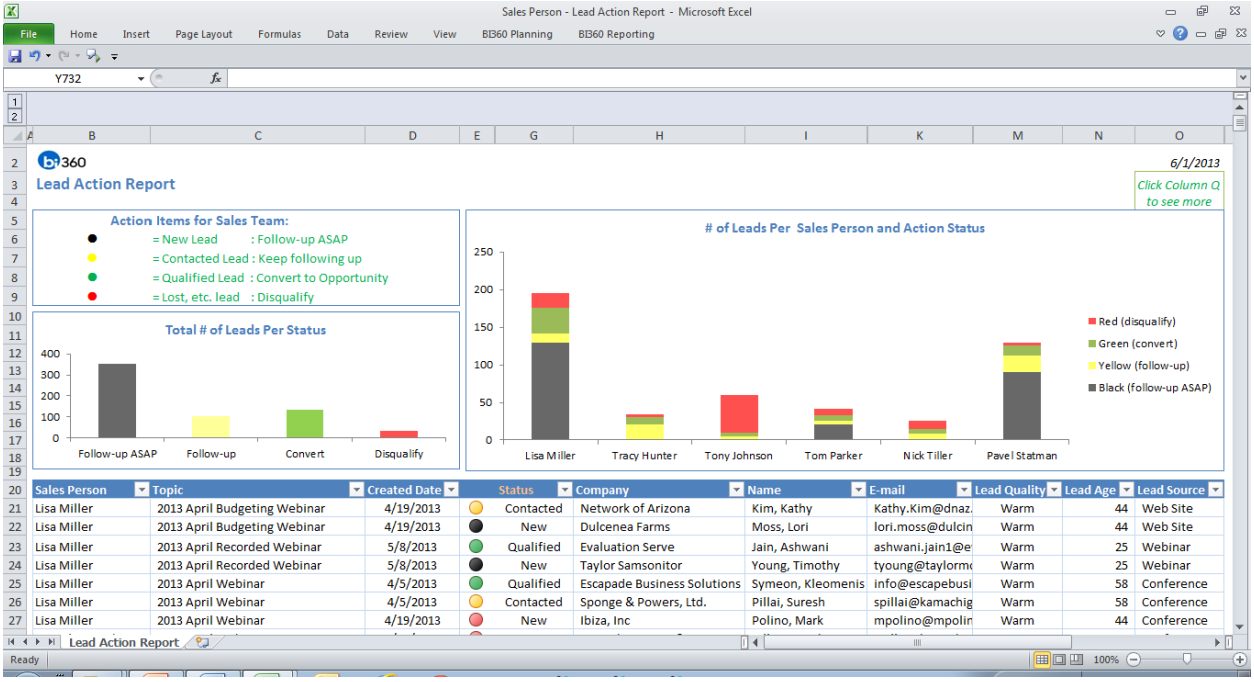
This LEAD report is designed to provide easy lead follow up, both for the sales team, but also for the sales manager to make sure no leads are “left behind” and to make sure leads are being followed up on in due time. The charts provide an easy glance at which leads have not yet been contacted (black), which have been qualified (green), etc.

The chart on the right side shows which sales person are able to convert the most leads into Opportunities (Status =”Qualified”) and who may need help to follow up with all their assigned leads (Status =”New”) and so on.

The chart on the left gives sales managers an idea of what is coming in the pipeline and thus based on the company’s average closing time, the report gives an indication of the amount of sales revenues coming down the road.

Numerous special features are used, including charts, traffic lights, column filters that add analytical capabilities. It also uses advanced functions to COUNT number of Leads per status, calculated lead AGE, etc.

The report can be run for any given date range: For example showing all leads from today and until the end of the quarter, providing any given snapshot of the company’s pipeline.

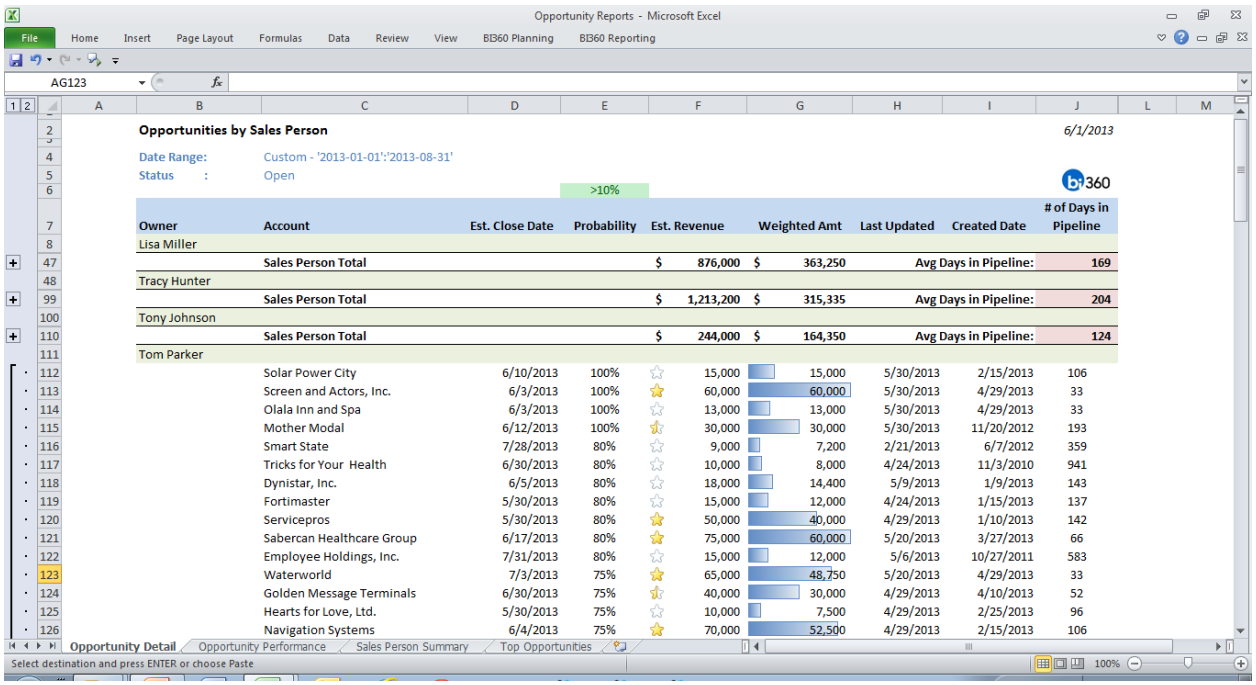


Report 4 – Opportunity Detail by Sales Person

Once the company's lead generation activities have taken place (see report examples on prior pages), a number of these are Qualified and the sales team can start working on these in the Opportunity module in MS CRM.

The main purpose of the report below is to provide sales people and sales managers with a detailed list of Opportunities by Sales Person. The built-in analytical features such as: # of days in pipeline, star ranking, in cell charts, etc. will help the team focus on the important deals. The # of days in pipeline will also indicate if certain sales people need coaching or other assistance to shorten their sales cycle. For example, as seen in the screenshot below, Tracy's sales cycle is almost double that of Tony.

The report below can be run for any date range, status (e.g. "Open" Opportunities and sales person(s). It groups Opportunities by Sales Person.



Opportunities by Sales Person — 6/1/2013

Date Range: Custom - '2013-01-01':'2013-08-31'
Status : Open

Owner	Account	Est. Close Date	Probability	Est. Revenue	Weighted Amt	Last Updated	Created Date	# of Days in Pipeline
			>10%					
Lisa Miller								
	Sales Person Total			$ 876,000	$ 363,250		Avg Days in Pipeline:	169
Tracy Hunter								
	Sales Person Total			$ 1,213,200	$ 315,335		Avg Days in Pipeline:	204
Tony Johnson								
	Sales Person Total			$ 244,000	$ 164,350		Avg Days in Pipeline:	124
Tom Parker								
	Solar Power City	6/10/2013	100%	15,000	15,000	5/30/2013	2/15/2013	106
	Screen and Actors, Inc.	6/3/2013	100%	60,000	60,000	5/30/2013	4/29/2013	33
	Olala Inn and Spa	6/3/2013	100%	13,000	13,000	5/30/2013	4/29/2013	33
	Mother Modal	6/12/2013	100%	30,000	30,000	5/30/2013	11/20/2012	193
	Smart State	7/28/2013	80%	9,000	7,200	2/21/2013	6/7/2012	359
	Tricks for Your Health	6/30/2013	80%	10,000	8,000	4/24/2013	11/3/2010	941
	Dynistar, Inc.	6/5/2013	80%	18,000	14,400	5/9/2013	1/9/2013	143
	Fortimaster	5/30/2013	80%	15,000	12,000	4/24/2013	1/15/2013	137
	Servicepros	5/30/2013	80%	50,000	40,000	4/29/2013	1/10/2013	142
	Sabercan Healthcare Group	6/17/2013	80%	75,000	60,000	5/20/2013	3/27/2013	66
	Employee Holdings, Inc.	7/31/2013	80%	15,000	12,000	5/6/2013	10/27/2011	583
	Waterworld	7/3/2013	75%	65,000	48,750	5/20/2013	4/29/2013	33
	Golden Message Terminals	6/30/2013	75%	40,000	30,000	4/29/2013	4/10/2013	52
	Hearts for Love, Ltd.	5/30/2013	75%	10,000	7,500	4/29/2013	2/25/2013	96
	Navigation Systems	6/4/2013	75%	70,000	52,500	4/29/2013	2/15/2013	106

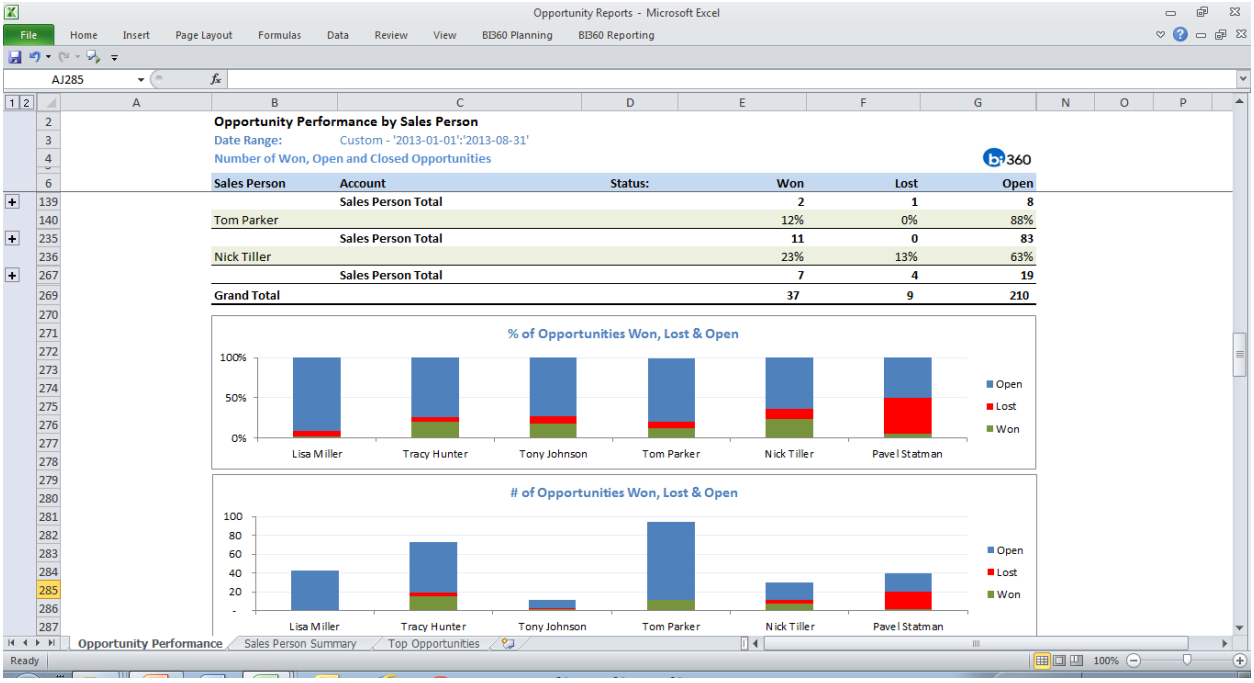
Report 5 – Opportunity Performance by Sales Person

The main purpose of the report below is to provide a performance comparison between members of the sales team. The report shows the number of Won, Lost and Open Opportunities per sales person.

The report section on the top provides both sales stage summary statistis and the ability to expand (see ”+” buttons to the left of each row) rows to see each Opportunity per sales person.

The top grapics is a 100% chart that shows what percent of each sales person’s pipeline are Won, Lost and Open. Green color shows ability to close deals. A high percent of Red indicates that a person might need coaching to learn how to increase their win ratio, while a high percent of Blue could indicate longer sales cycle and/or that the person needs to focus on (and maybe get more training on closing) closing existing deals.

The bottom graphics shows the exact number of deals per sales stage per sales person. A small column indicates low deal activity for a sales person while a tall column indicates high deal activity. Of course, if certain sales people focus on much larger deals than others, this might be perfectly normal. ”Report 6 – Opportunity Summary per Sales Person” on the next page of this document, will reveal information about the latter.

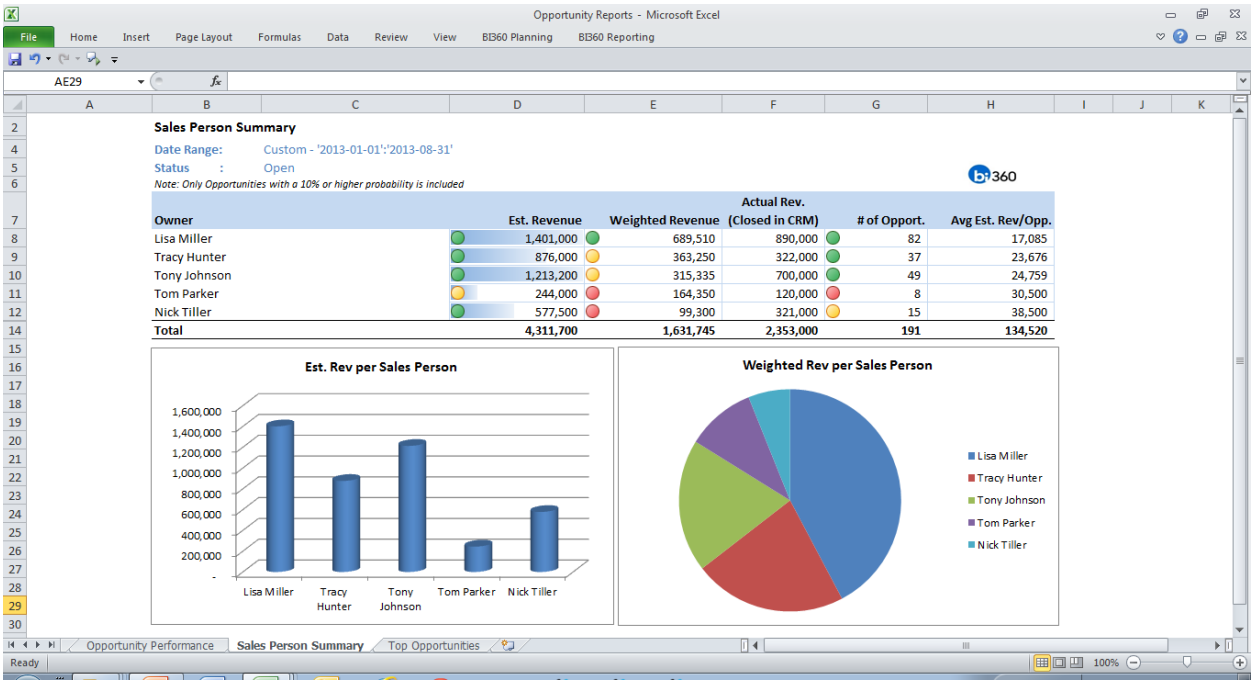


Report 6 – Opportunity Summary by Sales Person

The main purpose of this report is to provide a summary of both Estimated Revenue in the Opportunity pipeline by sales person as well as actual revenue from won deals.

The top section of the report uses traffic lights with set (and configurable) treshholds both for revenue volume and for # of Opportunities in the pipeline. The column to the far right shows the Average Estimated Revenue per Opportunity. In other words, it shows the typical size of a slaes person's Opportunities.

The two charts at the bottom shows graphical representation of Estimated Revenue per Sales Person and Weighted Revenue per Sales Person.

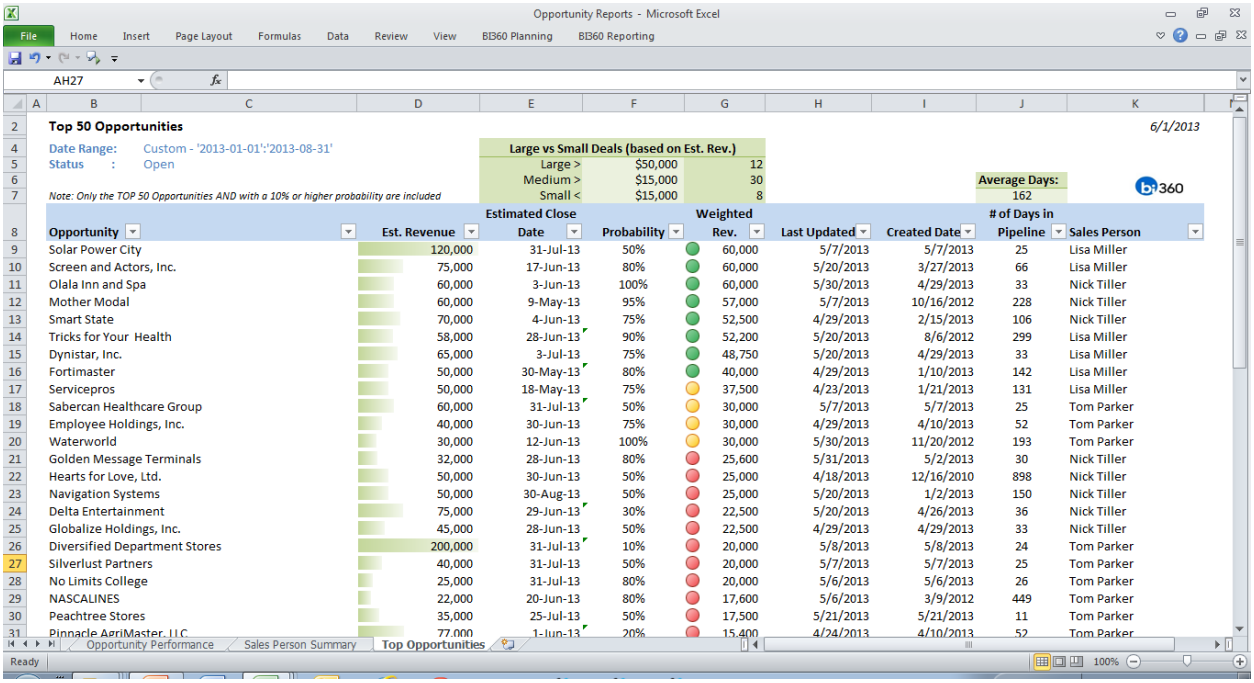


Report 7 – Top 50 Opportunities

This report serves as an Opportunity pipeline summary across all (or selected) sales people. It shows the Top 50 (configurable to more or less Opportunities) ongoing deals above 20% (configurable) probability to land. It can be run for any given time period, such as from now until the end of the quarter, providing a valuable revenue forecast of all the most likely deals that the sales team will land for the rest of this time period.

The report has a number of special features such as:

- Count of Opportunities by size category (small, medium and large).
- # of Days each deal has been in the pipeline.
- Total Average Days for the top 50 deals.
- Column filters allows the user to sort and filter every metric.
- Traffic lights provide visual indication of the top, medium and small opportunities.
- The report is set to show the top 50 opportunities based on the Weighted Revenue and at the same time auto-sort from highest to lowest.



Opportunity Reports - Microsoft Excel

Top 50 Opportunities 6/1/2013

Date Range: Custom - '2013-01-01':'2013-08-31'
Status : Open

Note: Only the TOP 50 Opportunities AND with a 10% or higher probability are included

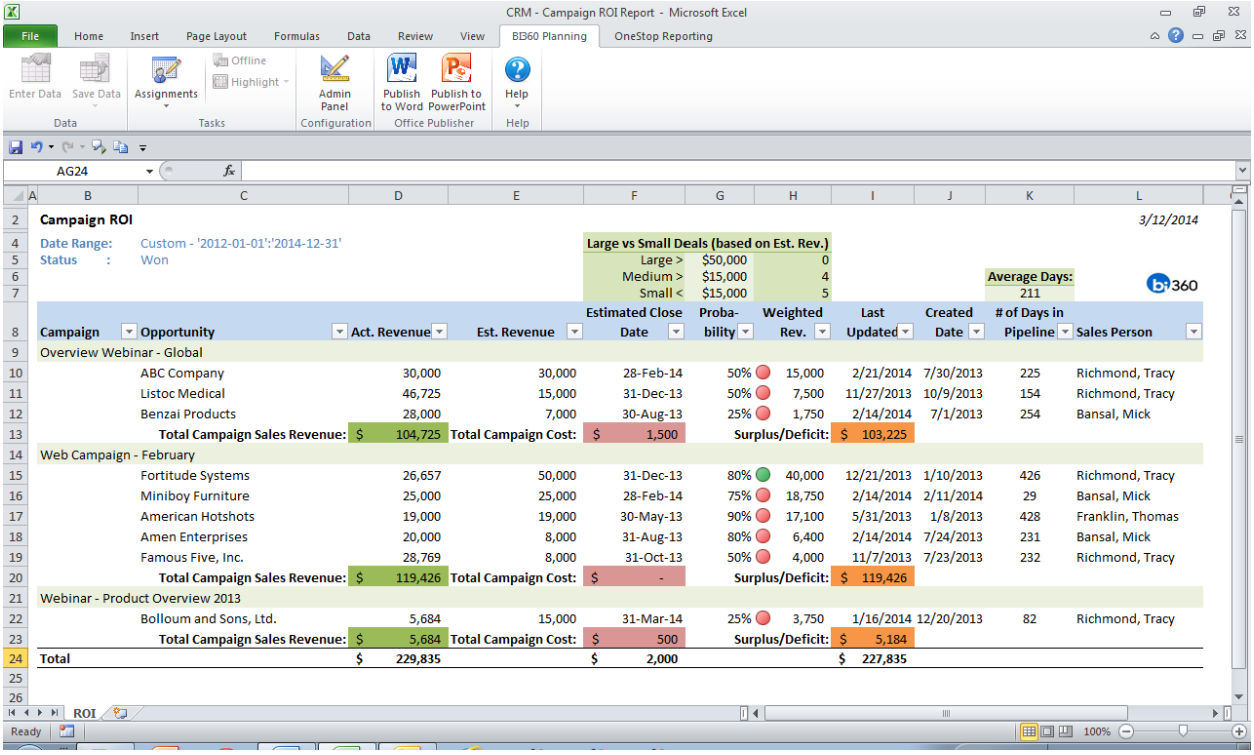
Large vs Small Deals (based on Est. Rev.)		
Large >	$50,000	12
Medium >	$15,000	30
Small <	$15,000	8

Average Days: 162

Opportunity	Est. Revenue	Estimated Close Date	Probability	Weighted Rev.	Last Updated	Created Date	# of Days in Pipeline	Sales Person
Solar Power City	120,000	31-Jul-13	50%	60,000	5/7/2013	5/7/2013	25	Lisa Miller
Screen and Actors, Inc.	75,000	17-Jun-13	80%	60,000	5/20/2013	3/27/2013	66	Lisa Miller
Olala Inn and Spa	60,000	3-Jun-13	100%	60,000	5/30/2013	4/29/2013	33	Nick Tiller
Mother Modal	60,000	9-May-13	95%	57,000	5/7/2013	10/16/2012	228	Nick Tiller
Smart State	70,000	4-Jun-13	75%	52,500	4/29/2013	2/15/2013	106	Nick Tiller
Tricks for Your Health	58,000	28-Jun-13	90%	52,200	5/20/2013	8/6/2012	299	Lisa Miller
Dynistar, Inc.	65,000	3-Jul-13	75%	48,750	5/20/2013	4/29/2013	33	Lisa Miller
Fortimaster	50,000	30-May-13	80%	40,000	4/29/2013	1/10/2013	142	Lisa Miller
Servicepros	50,000	18-May-13	75%	37,500	4/23/2013	1/21/2013	131	Lisa Miller
Sabercan Healthcare Group	60,000	31-Jul-13	50%	30,000	5/7/2013	5/7/2013	25	Tom Parker
Employee Holdings, Inc.	40,000	30-Jun-13	75%	30,000	4/29/2013	4/10/2013	52	Tom Parker
Waterworld	30,000	12-Jun-13	100%	30,000	5/30/2013	11/20/2012	193	Tom Parker
Golden Message Terminals	32,000	28-Jun-13	80%	25,600	5/31/2013	5/2/2013	30	Nick Tiller
Hearts for Love, Ltd.	50,000	30-Jun-13	50%	25,000	4/18/2013	12/16/2010	898	Nick Tiller
Navigation Systems	50,000	30-Aug-13	50%	25,000	5/20/2013	1/2/2013	150	Nick Tiller
Delta Entertainment	75,000	29-Jun-13	30%	22,500	5/20/2013	4/26/2013	36	Nick Tiller
Globalize Holdings, Inc.	45,000	28-Jun-13	50%	22,500	4/29/2013	4/29/2013	33	Nick Tiller
Diversified Department Stores	200,000	31-Jul-13	10%	20,000	5/8/2013	5/8/2013	24	Tom Parker
Silverlust Partners	40,000	31-Jul-13	50%	20,000	5/7/2013	5/7/2013	25	Tom Parker
No Limits College	25,000	31-Jul-13	80%	20,000	5/6/2013	5/6/2013	26	Tom Parker
NASCALINES	22,000	20-Jun-13	80%	17,600	5/6/2013	3/9/2012	449	Tom Parker
Peachtree Stores	35,000	25-Jul-13	50%	17,500	5/21/2013	5/21/2013	11	Tom Parker
Pinnacle AgriMaster, LLC	77,000	1-Jun-13	20%	15,400	4/24/2013	4/10/2013	52	Tom Parker

Report 8 – Campaign ROI

As the sales team close their Opportunities and these turn into WON opportunities, the report below will sort these opportunities by Campaign and bring in the COST from the Campaign and compare it to the REVENUE from the WON opportunity to show if your campaign was profitable or not.



Campaign ROI — 3/12/2014

Date Range: Custom - '2012-01-01':'2014-12-31'
Status : Won

Large vs Small Deals (based on Est. Rev.)		
Large >	$50,000	0
Medium >	$15,000	4
Small <	$15,000	5

Average Days: 211

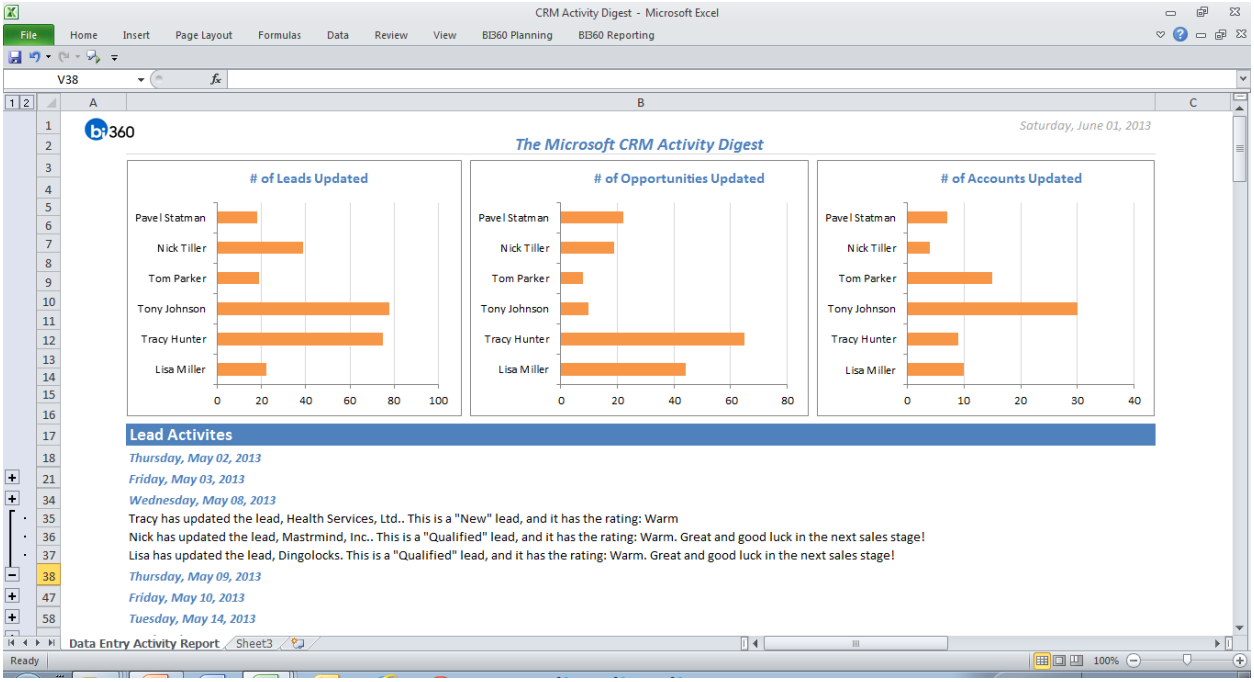
Campaign	Opportunity	Act. Revenue	Est. Revenue	Estimated Close Date	Proba-bility	Weighted Rev.	Last Updated	Created Date	# of Days in Pipeline	Sales Person
Overview Webinar - Global										
	ABC Company	30,000	30,000	28-Feb-14	50%	15,000	2/21/2014	7/30/2013	225	Richmond, Tracy
	Listoc Medical	46,725	15,000	31-Dec-13	50%	7,500	11/27/2013	10/9/2013	154	Richmond, Tracy
	Benzai Products	28,000	7,000	30-Aug-13	25%	1,750	2/14/2014	7/1/2013	254	Bansal, Mick
	Total Campaign Sales Revenue:	$ 104,725	Total Campaign Cost:	$ 1,500		Surplus/Deficit:	$ 103,225			
Web Campaign - February										
	Fortitude Systems	26,657	50,000	31-Dec-13	80%	40,000	12/21/2013	1/10/2013	426	Richmond, Tracy
	Miniboy Furniture	25,000	25,000	28-Feb-14	75%	18,750	2/14/2014	2/11/2014	29	Bansal, Mick
	American Hotshots	19,000	19,000	30-May-13	90%	17,100	5/31/2013	1/8/2013	428	Franklin, Thomas
	Amen Enterprises	20,000	8,000	31-Aug-13	80%	6,400	2/14/2014	7/24/2013	231	Bansal, Mick
	Famous Five, Inc.	28,769	8,000	31-Oct-13	50%	4,000	11/7/2013	7/23/2013	232	Richmond, Tracy
	Total Campaign Sales Revenue:	$ 119,426	Total Campaign Cost:	$ -		Surplus/Deficit:	$ 119,426			
Webinar - Product Overview 2013										
	Bolloum and Sons, Ltd.	5,684	15,000	31-Mar-14	25%	3,750	1/16/2014	12/20/2013	82	Richmond, Tracy
	Total Campaign Sales Revenue:	$ 5,684	Total Campaign Cost:	$ 500		Surplus/Deficit:	$ 5,184			
Total		$ 229,835		$ 2,000			$ 227,835			

Report 9 – CRM Activity Report

The purpose of this report is to provide a graphical summary as well as a detailed digest of all the CRM activity across Leads, Opportunities and Accounts during a given time period (e.g. a week). It is a good indication of CRM usage (or not).

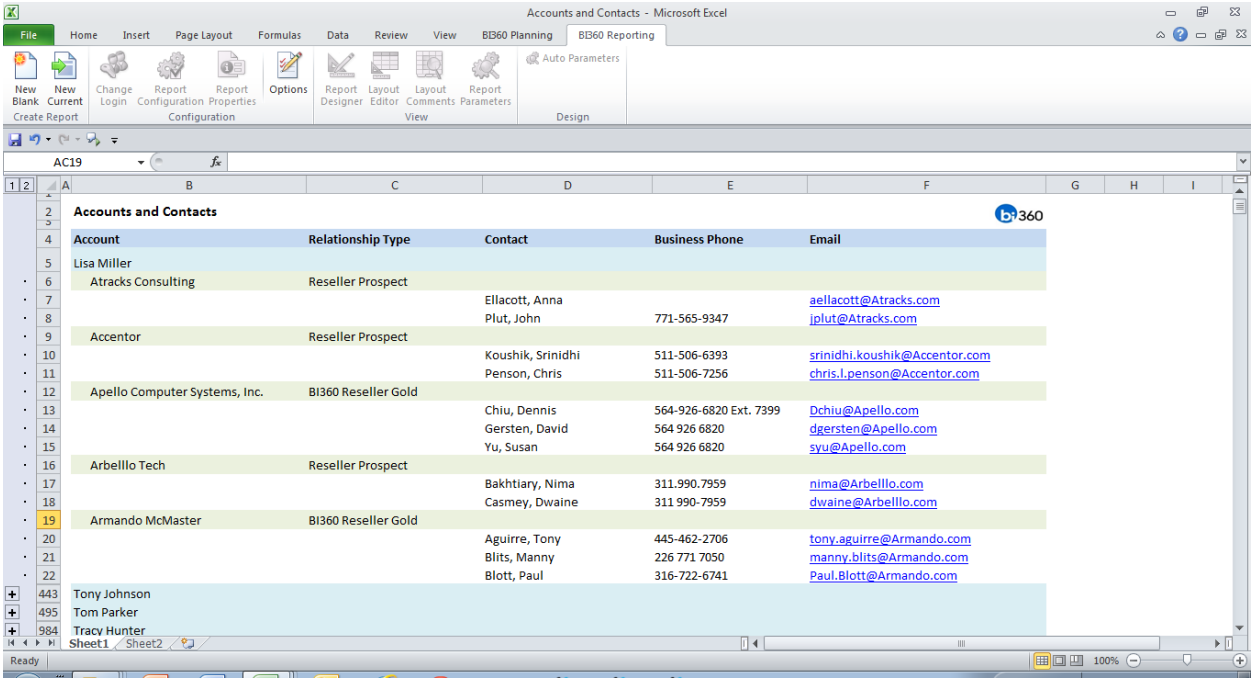
The charts show the summary of the number of Leads, Opportunities and Accounts that have been created or updated by sales person. Small bars either indicate low activity in the given area or that the sales person is not updating CRM. Long bars indicate a lot of activity in the given area.

The lower part of the report is an automatically generated digest by day. In other words, it auto-narrates one row per activity, spelling out in plain English what the sales team updated that day in Leads (top section), Opportunities (the latter two are visible in the screenshot below), and Accounts. A number of algorithms control adjectives. For example, if an Opportunity has status “Won” the narrative will include “Congratulations!”.



Report 10 - Contacts by Sales Person by Account

This is a very basic report that shows the capability of reporting across CRM tables (here: Accounts and Contacts) and to provide simple but completely automated extracts from MS CRM.



Accounts and Contacts

Account	Relationship Type	Contact	Business Phone	Email
Lisa Miller				
Atracks Consulting	Reseller Prospect			
		Ellacott, Anna		aellacott@Atracks.com
		Plut, John	771-565-9347	jplut@Atracks.com
Accentor	Reseller Prospect			
		Koushik, Srinidhi	511-506-6393	srinidhi.koushik@Accentor.com
		Penson, Chris	511-506-7256	chris.l.penson@Accentor.com
Apello Computer Systems, Inc.	BI360 Reseller Gold			
		Chiu, Dennis	564-926-6820 Ext. 7399	Dchiu@Apello.com
		Gersten, David	564 926 6820	dgersten@Apello.com
		Yu, Susan	564 926 6820	syu@Apello.com
Arbelllo Tech	Reseller Prospect			
		Bakhtiary, Nima	311.990.7959	nima@Arbelllo.com
		Casmey, Dwaine	311 990-7959	dwaine@Arbelllo.com
Armando McMaster	BI360 Reseller Gold			
		Aguirre, Tony	445-462-2706	tony.aguirre@Armando.com
		Blits, Manny	226 771 7050	manny.blits@Armando.com
		Blott, Paul	316-722-6741	Paul.Blott@Armando.com
Tony Johnson				
Tom Parker				
Tracy Hunter				

Appendix

Additional Resources

The Solver Support Center (support.solverusa.com) is the centralized location for users to learn more about the BI360 Suite. From opening and managing your support tickets to reading knowledgebase articles about the product, the Solver Support Center has everything a user will need.

Users may contact Solver Support if they have questions about the BI360 Suite. One of our technical support consultants will gladly assist you.

Users can access the Solver Knowledgebase for more information about the entire BI360 Suite. From user guides, white papers, training manuals and much more, the Solver Support Center has everything a user will need to get started with the application.