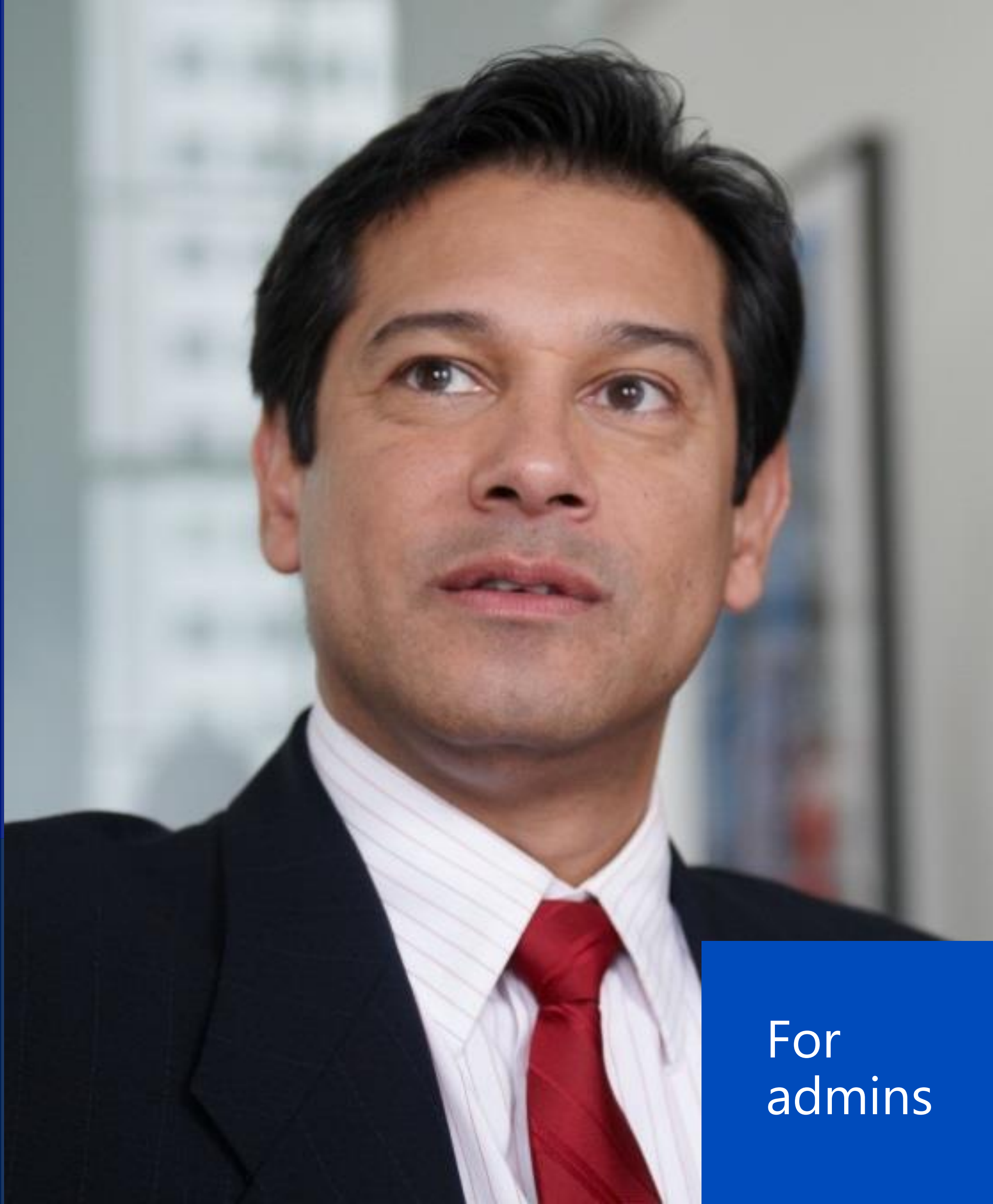
Create or customize CRM system dashboards

Make the data that matters easily accessible to your teams in Microsoft Dynamics CRM

Microsoft



For admins

Making data meaningful

"Information is the oil of the 21st century, and analytics is the combustion engine."
 - Peter Sondergaard, senior vice president at Gartner

Information is the lifeblood of businesses. But business information is only meaningful if it's presented in a way that sales, marketing, and service teams can easily understand and act on. Dashboards provide the vehicle to uncover and visualize your most important information—the data that matters—so your teams can make quick and informed decisions.

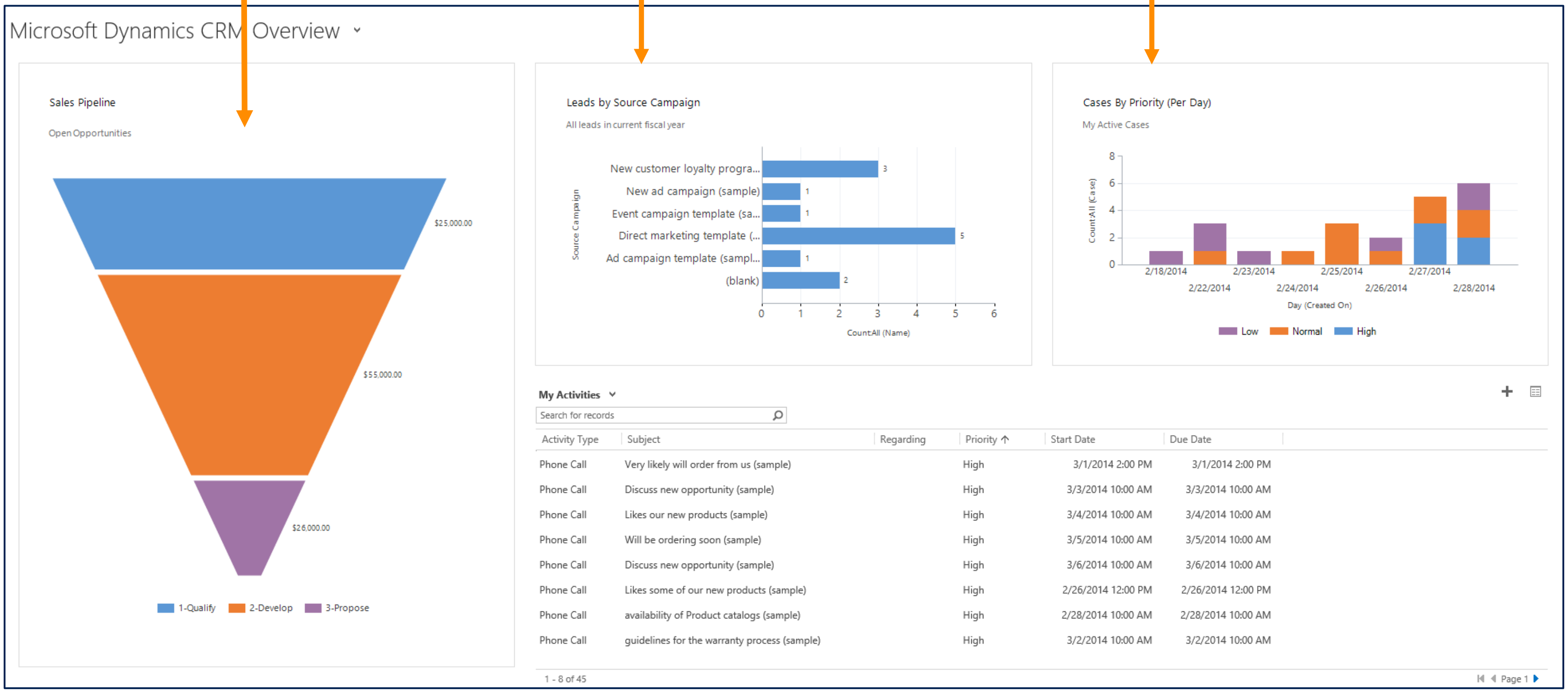
Performance at a glance

Dashboards collect your organization's most important information in one place, in an easy-to-read format. Use a dashboard to gain insights in real time, and then take appropriate action.

What's in the sales pipeline?

Which campaign developed the most sales leads?

What does the case load look like this week?



What are my highest priorities and when are they due?

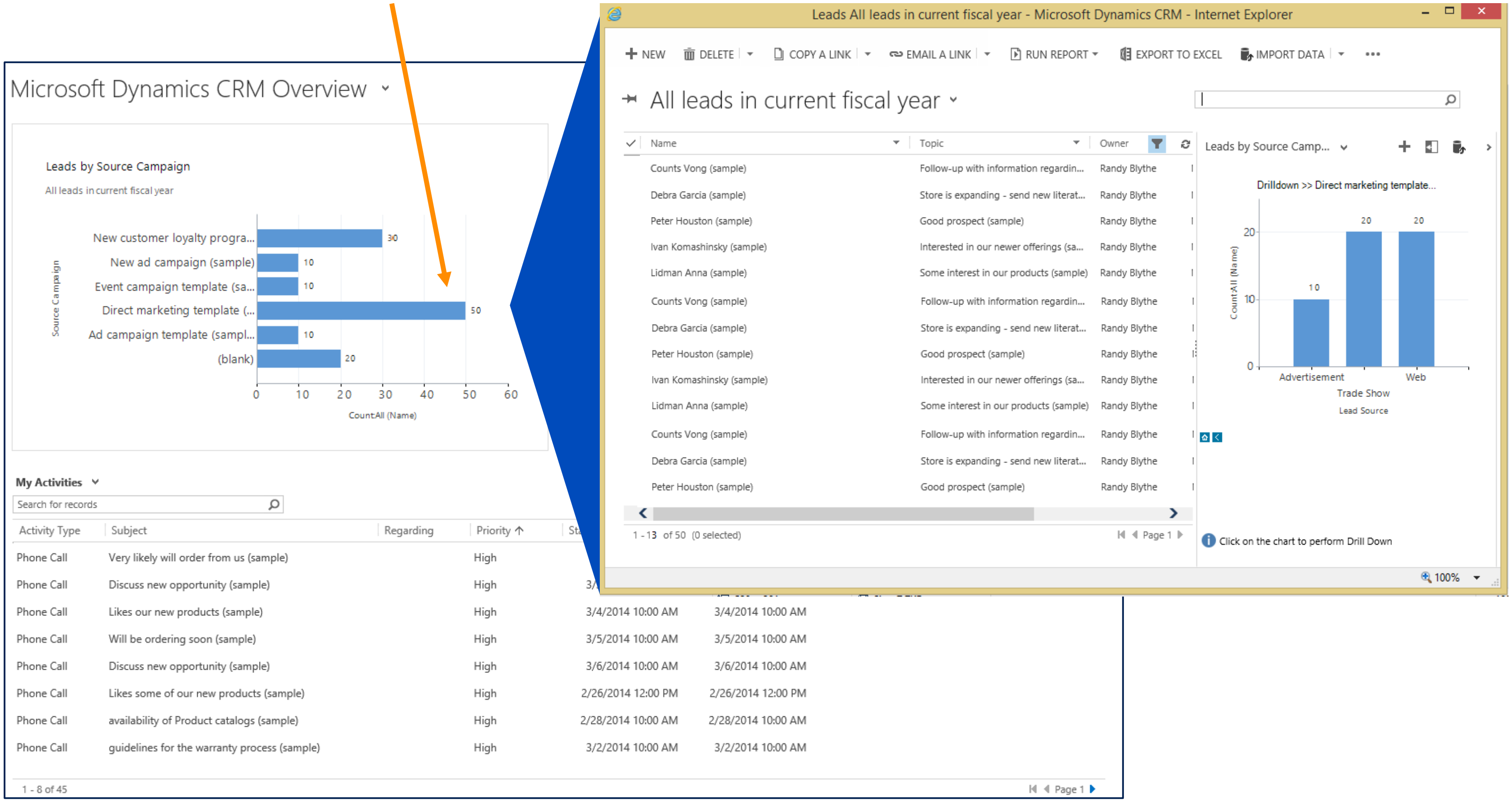
Applies to: Microsoft Dynamics CRM Online and Microsoft Dynamics CRM 2015 and earlier versions (on-premises)

Dig deeper for greater insights

When you want to know more, you can interact with your dashboard data. For example, you can "drill down" into part of a chart.

Drill down into part of a chart, like a single bar in a bar chart...

...to see the underlying data that makes up that part of the chart.



Different dashboards for different roles

A salesperson tracking opportunities needs a different dashboard than a sales manager or executive focused on performance. With CRM, you can pick the right dashboard for your role, whether you're in Sales, Service, or Marketing, and depending on your focus. Pick from any of the following built-in dashboards.

Sales Dashboards	Customer Service Dashboards	Marketing Dashboards	General Dashboards
• Sales Activity Dashboard • Sales Activity Social Dashboard • Sales Dashboard • Sales Performance Dashboard	• Customer Service Manager Dashboard • Customer Service Representative Social Dashboard • Customer Service Performance Dashboard • Customer Service Operations Dashboard • Customer Service Representative Dashboard	• Marketing Dashboard • Marketing Social Dashboard	• Microsoft Dynamics CRM Overview Dashboard • Microsoft Dynamics CRM Social Overview Dashboard

If the built-in dashboards don't meet your needs, you can modify them or create new dashboards.

Tip If you're using Microsoft Social Engagement or Microsoft Dynamics Marketing with Microsoft Dynamics CRM, you can access additional dashboards.

Dashboard fundamentals

There are two main types of dashboards in CRM: **system** dashboards and **user** dashboards. Here's what you need to know about each:

System dashboards	User dashboards
Created by a system admin or system customizer	Created by any user
Created in the **Settings** area	Created in a user's work area: **Sales**, **Service**, or **Marketing**
Must be published to be visible	Do not need to be published to be visible
Visible to everyone in the organization, although they can be "hidden" by using security roles	Visible only to the user who creates them, although a user can share a dashboard or assign to another user
The system admin or system customizer can set a particular dashboard as the default dashboard—the one everyone sees when they start CRM—for the whole organization.	A user can set their own default dashboard, overriding the default dashboard set by the system admin or system customizer.

Note This eBook focuses on creating and customizing **system** dashboards.

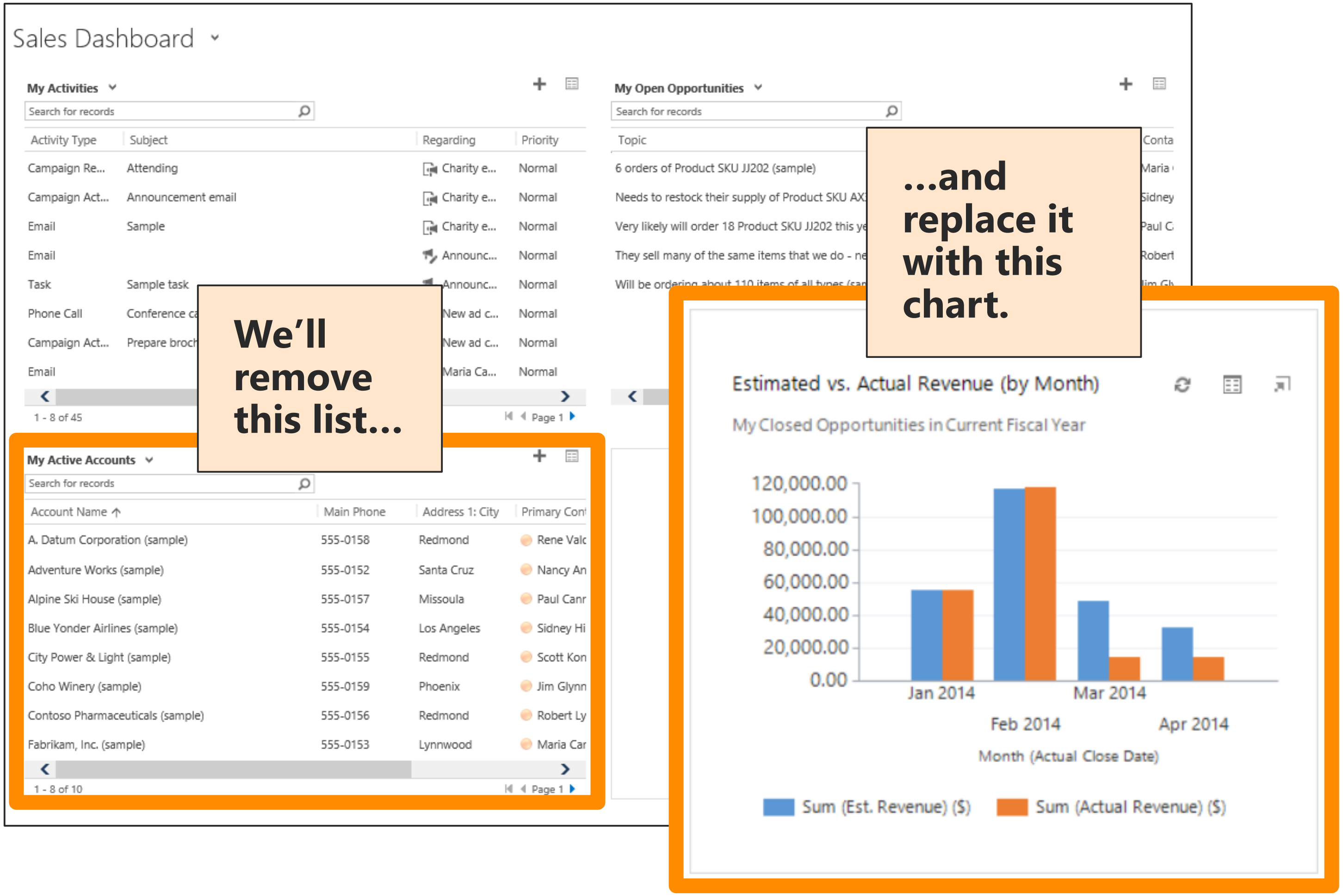
Creating or modifying a system dashboard

The Sales team at Contoso has requested a change to the Sales Dashboard—a system dashboard. They've decided it's more important to see their monthly sales totals than their active accounts. They also want to compare their actual sales to sales estimates to see how well they're doing.

We'll modify the Sales Dashboard in this example to meet the needs of the Sales team.

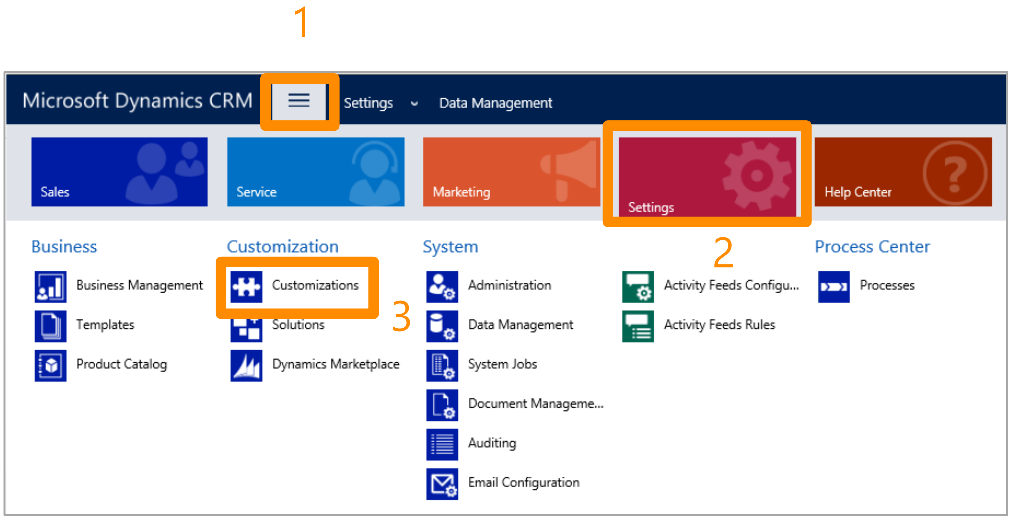
Modify a system dashboard

In this example, we'll replace the **Active Accounts** list on the Sales Dashboard with a new chart.



Open a system dashboard

If your screen looks like this (latest version):

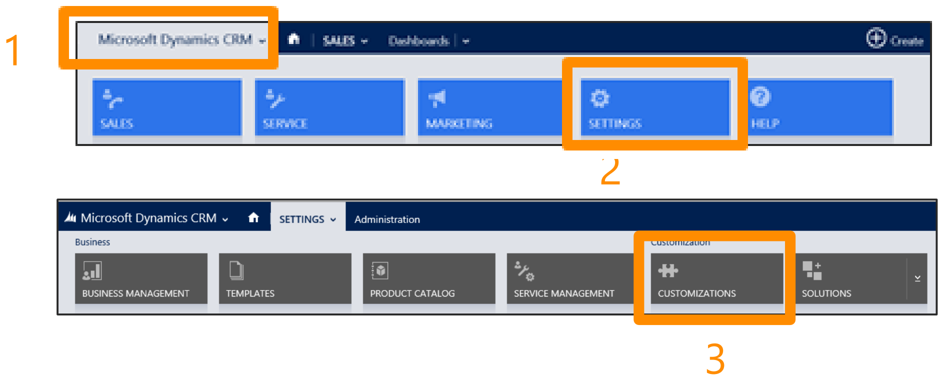


1 On the nav bar, choose the **Main Menu** button.

2 Choose **Settings**.

3 Choose **Customizations**.

If your screen looks like this (earlier versions):

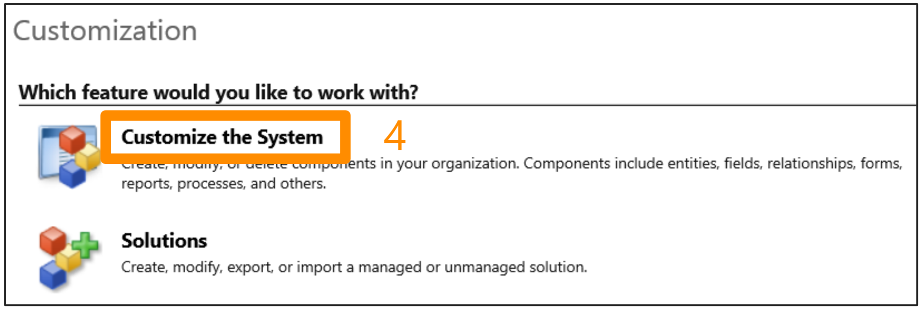


1 On the nav bar, choose the **Microsoft Dynamics CRM** logo.

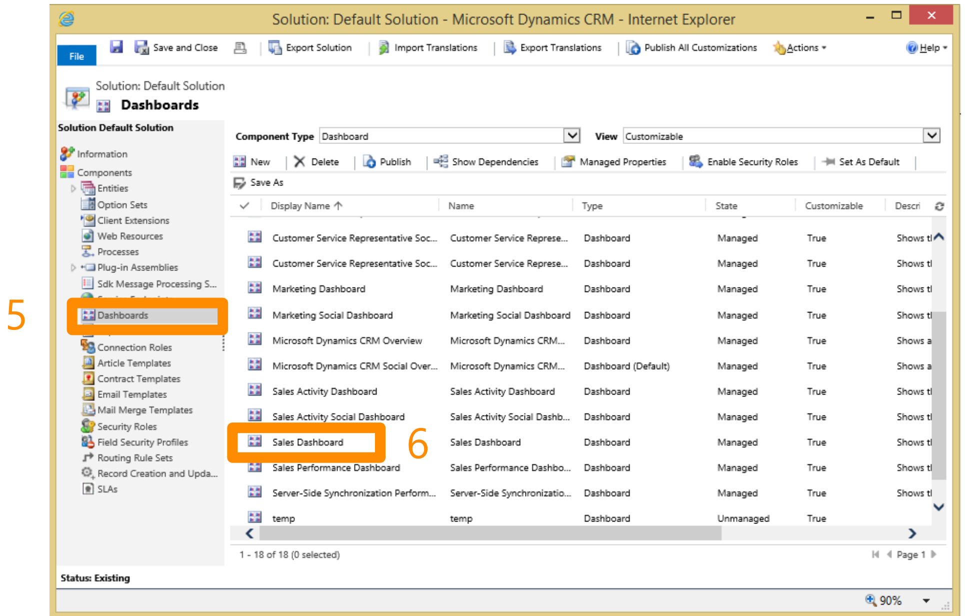
2 Choose **Settings**.

3 In **Settings**, choose **Customizations**.

Open a system dashboard (cont'd)



4 On the **Customization** page, choose **Customize the System**.



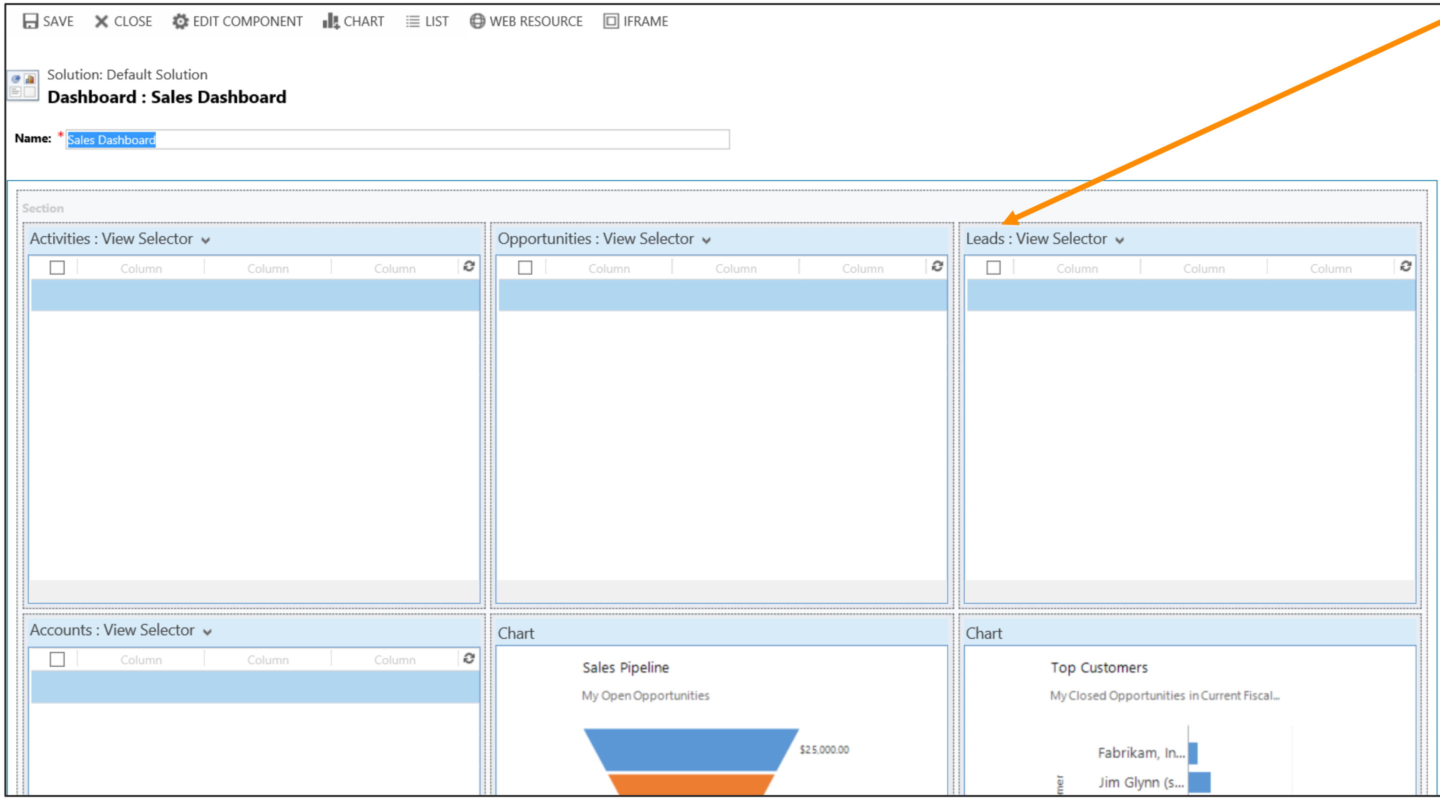
5 In the **Solution: Default Solution** window, choose **Dashboards** in the left nav.

6 Double-click the dashboard you want to open. For this example, double-click **Sales Dashboard**.

Work with the dashboard layout

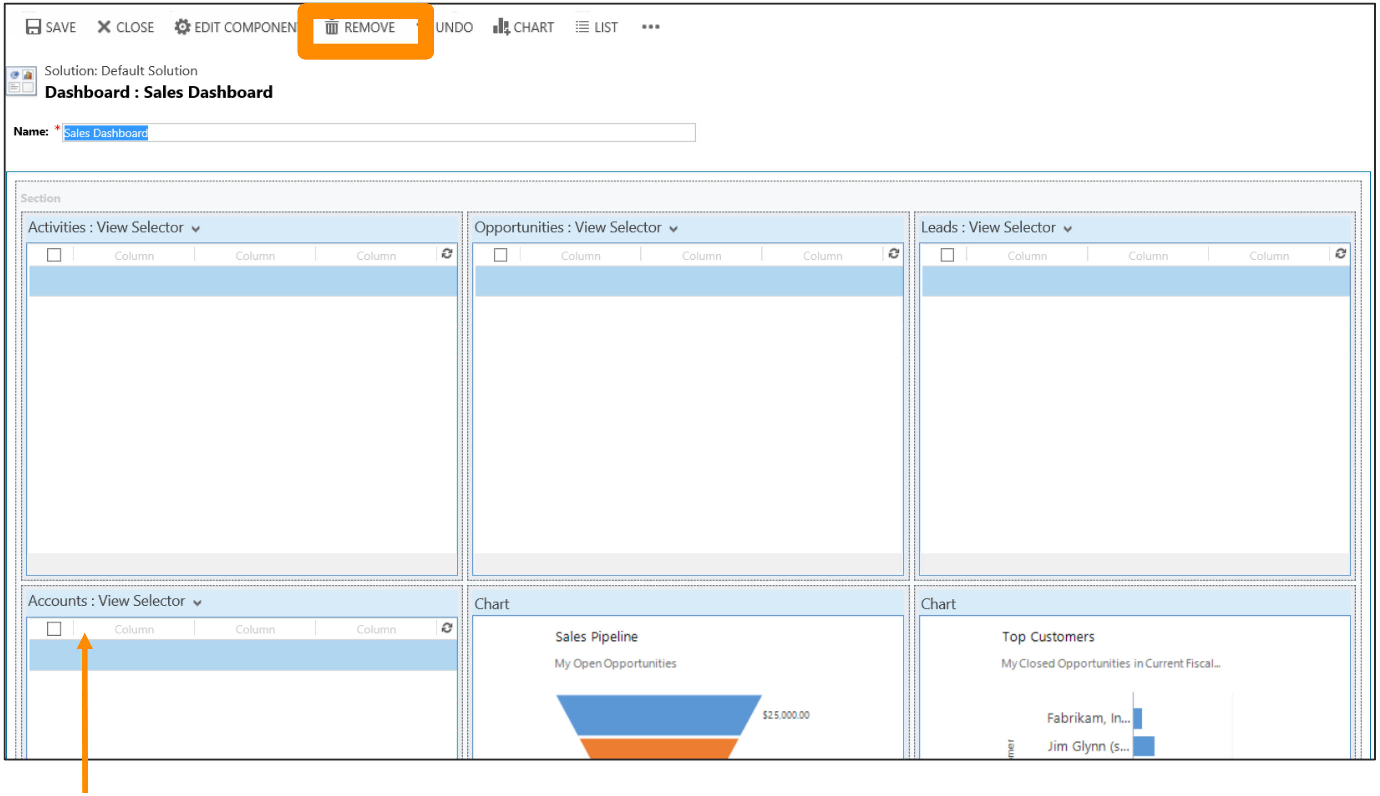
The default Sales Dashboard includes four lists and two charts. In the layout screen, you'll see six squares, one for each component.

In the layout screen, you see just the list name, not the list data.



You can see charts in the layout screen.

Remove a list or other component



Note: If you remove a component from one of the squares in the top row, CRM automatically moves the component below it up. You can't have an empty component square in the top row of a dashboard.

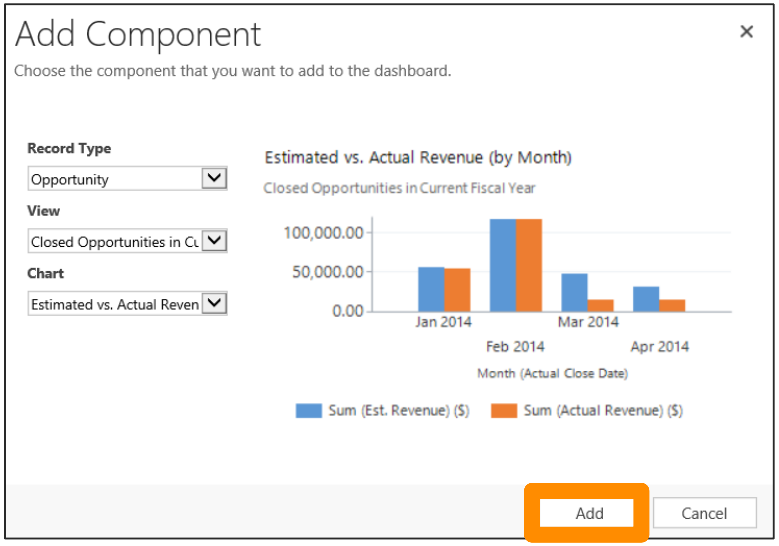
To remove a list (or any other component), select it, and then choose **Remove** at the top of the screen.

Add a chart

Now let's add the chart. CRM includes many ready-made system charts that are simple to add, or you can create and add your own system charts if you have the System Administrator or System Customizer role.

1 Choose **Chart** at the top of the layout screen.

2 In the **Add Component** dialog box, select values for **Record Type**, **View**, and **Chart**.



To create this system chart, select the following:

Record Type: Opportunity

View: Closed Opportunities in Current Fiscal Year

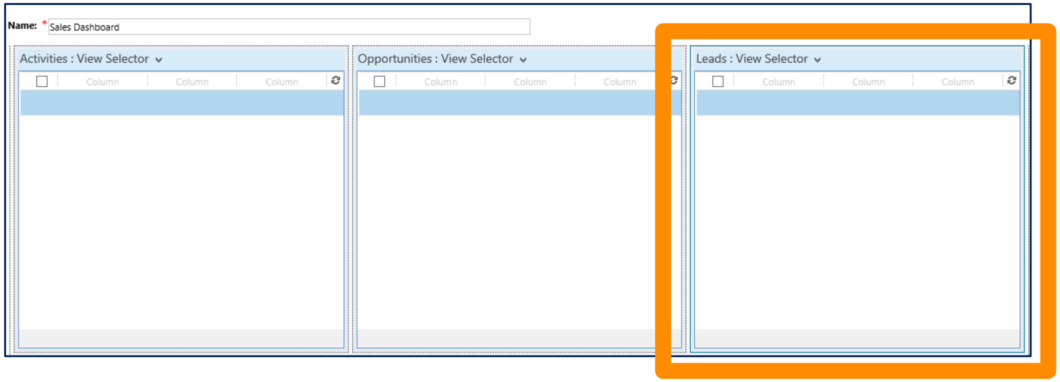
Chart: Estimated vs. Actual Revenue (by Month)

3 Choose **Add** to add the chart to the dashboard layout.

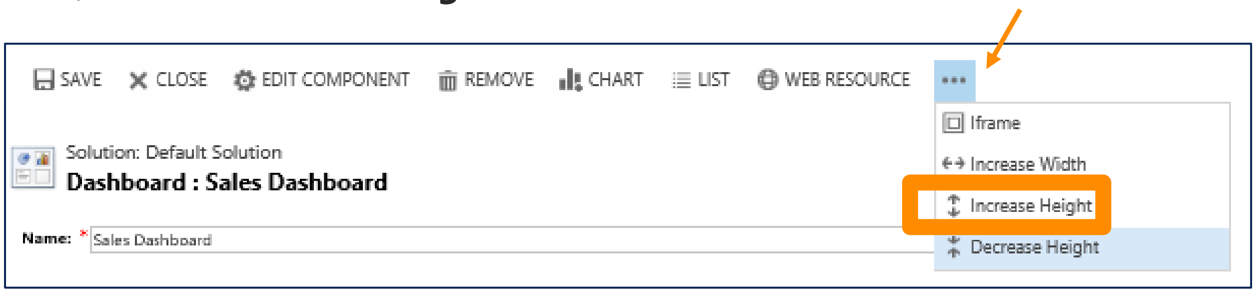
Adjust the size of a list or other component

The **Leads** list on the Sales Dashboard lists 8 records. We can make the **Leads** list taller so the Sales team can see all open leads on one screen.

1 Select the component.



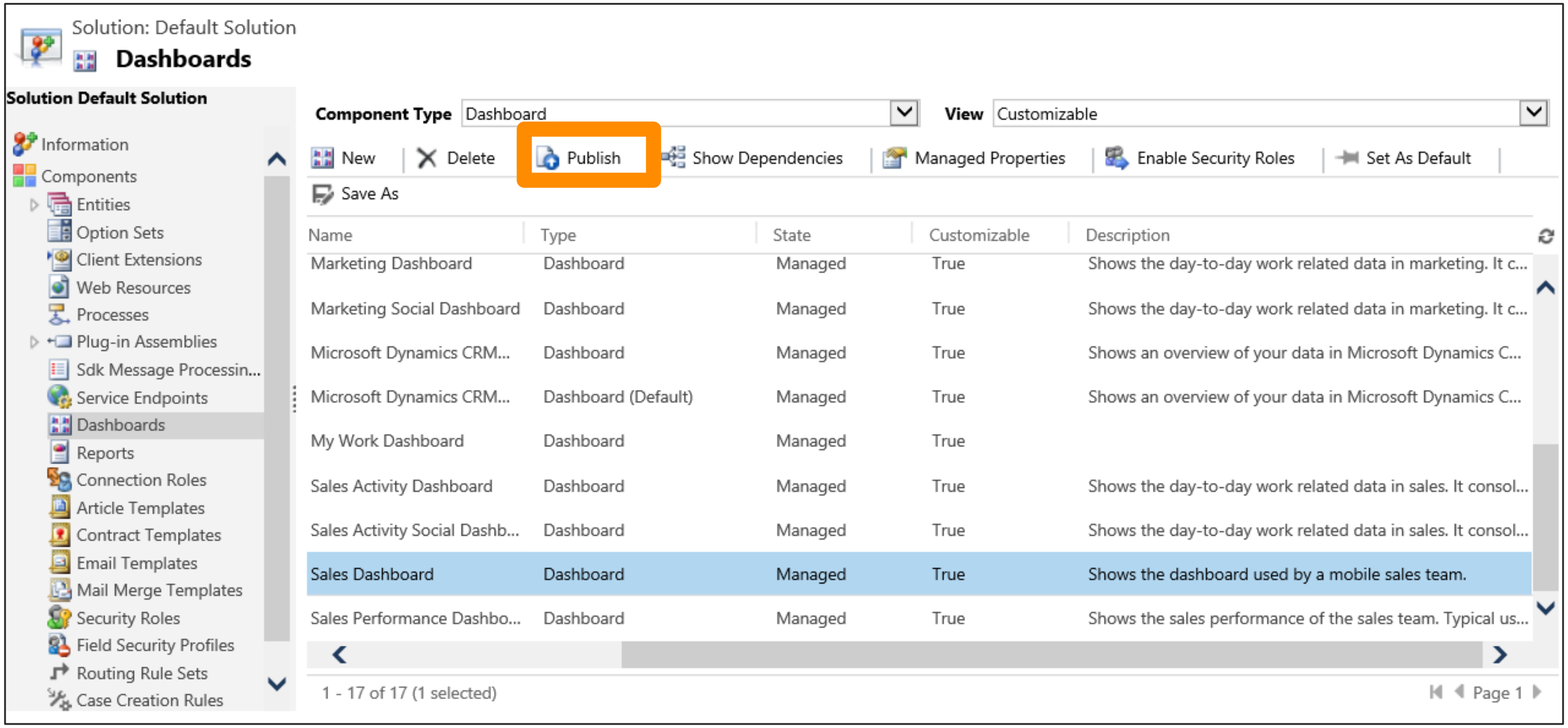
2 Choose the **More** (three dots) button at the top of the screen, and then choose an option. In this case, choose **Increase Height**.



Publish your changes

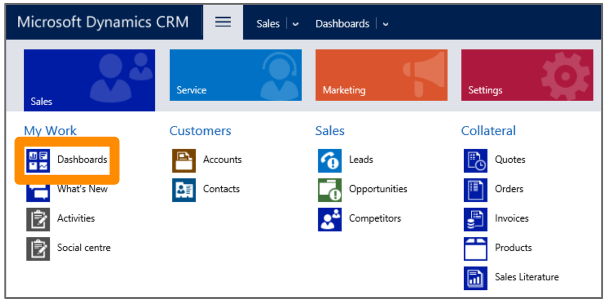
Since the Sales Dashboard is a system dashboard, we have to publish the changes to make them visible. Save your changes in the dashboard layout screen before doing this step.

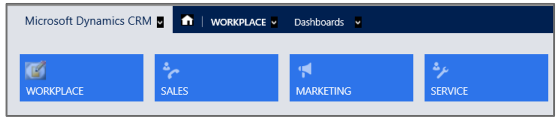
- In the **Solution: Default Solution** window, select the dashboard, and then choose **Publish**.



View the updated dashboard

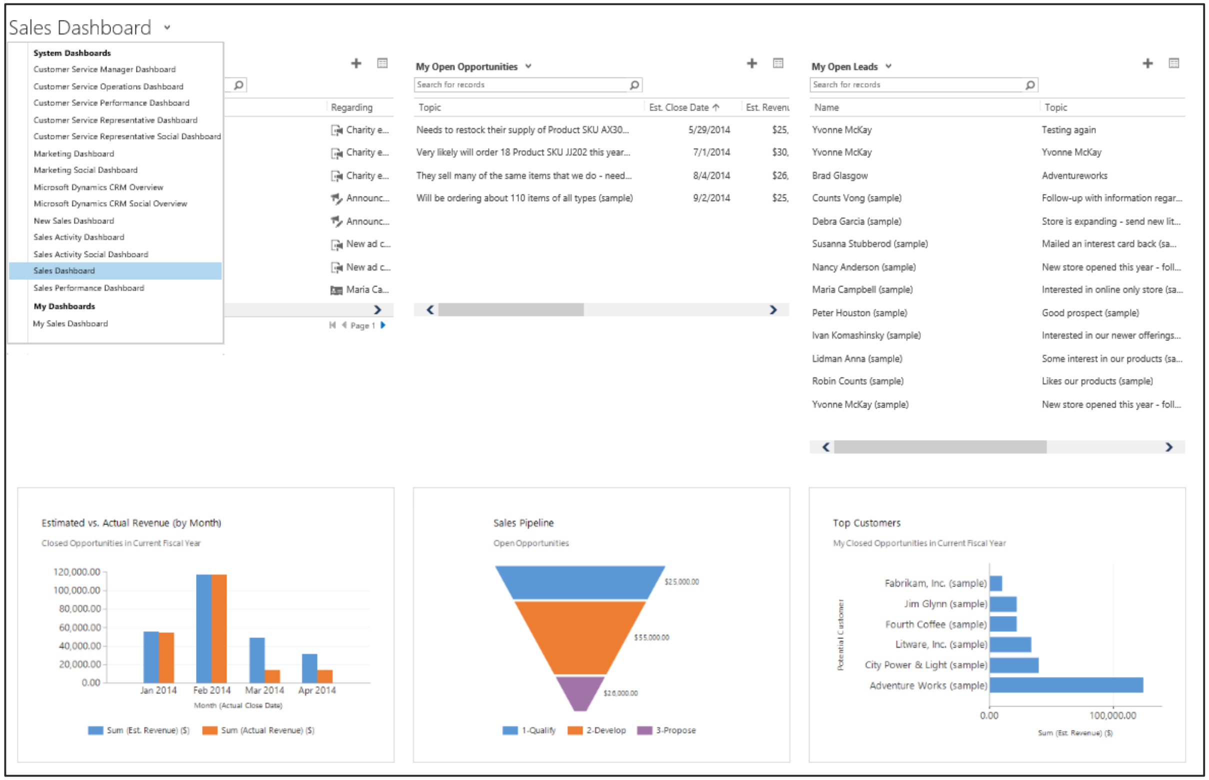
If you're using the latest version of CRM, choose the **Sales**, **Service**, or **Marketing** tile, and then choose **Dashboards**.





If you're using an earlier version of CRM, choose the **Sales**, **Service**, or **Marketing** tile.

Select the dashboard from the list.



The full list of leads is visible now.

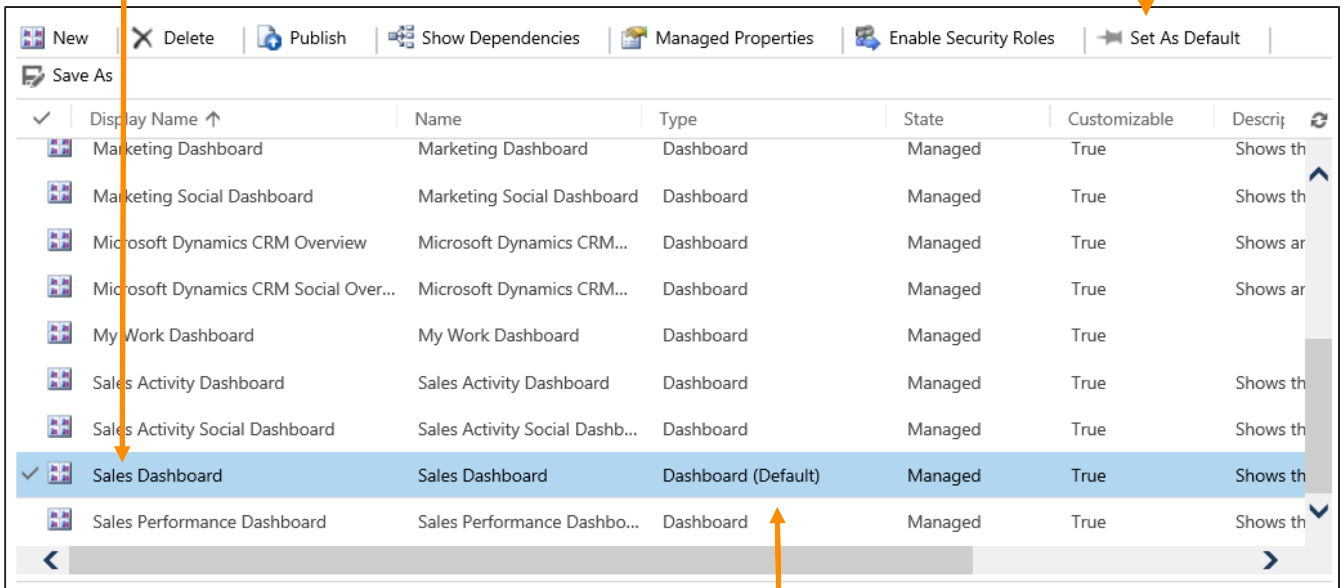
New chart shows estimated vs. actual sales.

Set the default dashboard

The default dashboard is the first thing everyone in the organization sees after starting CRM. We'll set the Sales Dashboard as the default since most of the users in this organization are sales people.

1 In the **Solution: Default Solution** window, select the dashboard.

2 Choose **Set As Default**.



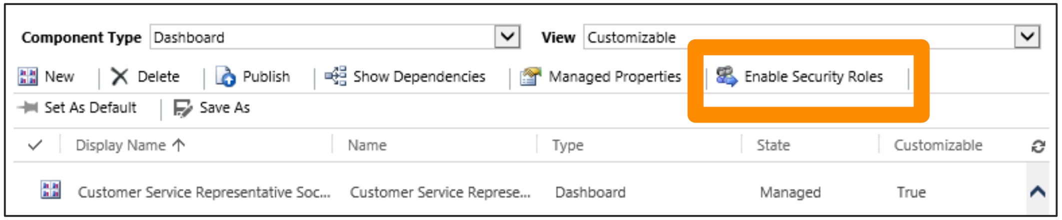
In the **Type** column, you can see that this dashboard is now the default.

Note: A user can override the default dashboard set by the system admin to set their own default dashboard.

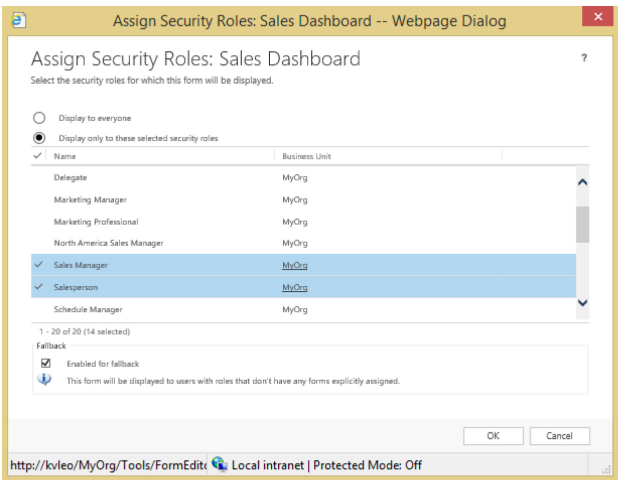
Hide a dashboard from certain roles

System dashboards are visible to everyone in an organization. You can use security roles to make a dashboard visible to just certain roles.

1 In the **Solution: Default Solution** window, select **Sales Dashboard**, and then choose **Enable Security Roles**.

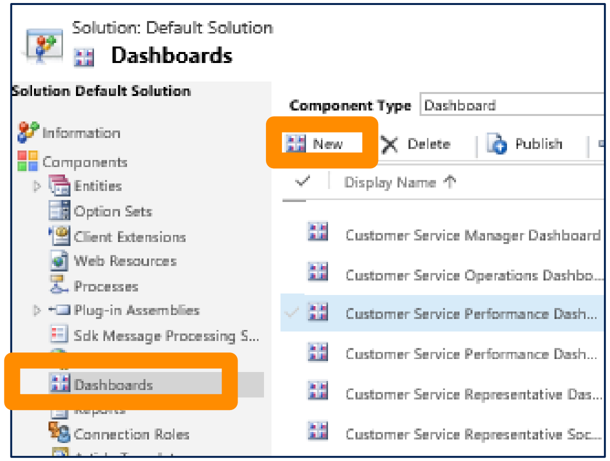


2 In the **Assign Security Roles** dialog box, choose the **Display only to these selected security roles** option, and then check just the roles you want to provide access to. For example, check the **Salesperson** and **Sales Manager** roles.

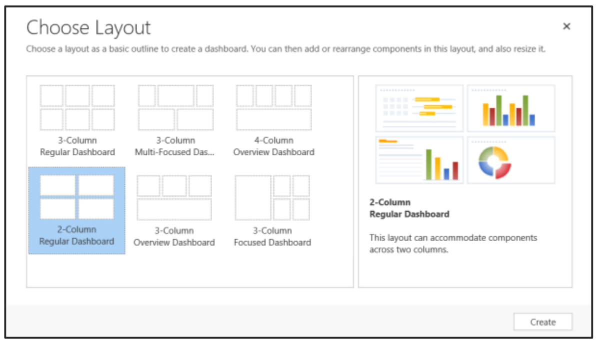


Create a new system dashboard

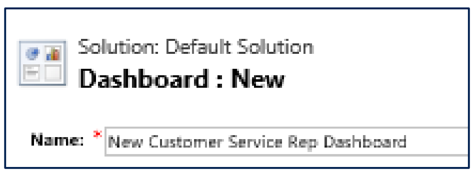
In many cases, you'll want to create a new system dashboard specific to your organization's needs instead of modifying an existing dashboard. The process for creating a new dashboard is similar to modifying a dashboard.



1 Go to the **Solution: Default Solution** window, choose **Dashboards** in the left navigation pane, and then choose **New**.



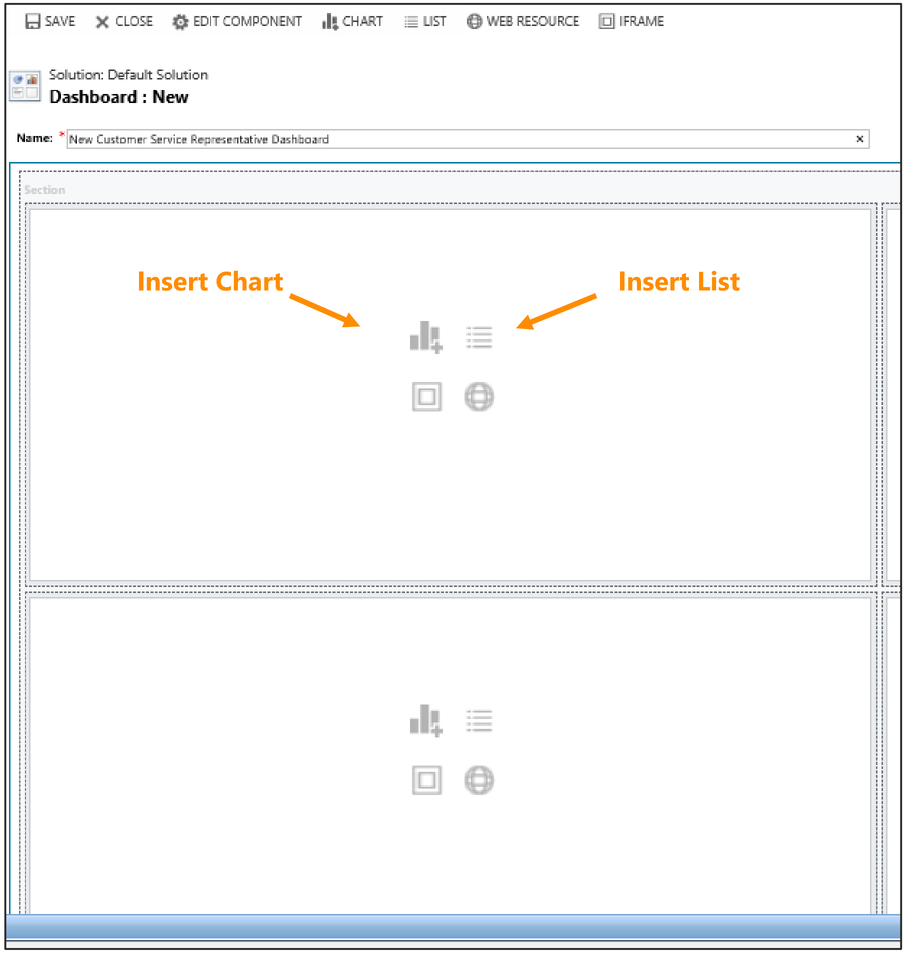
2 Choose a layout.

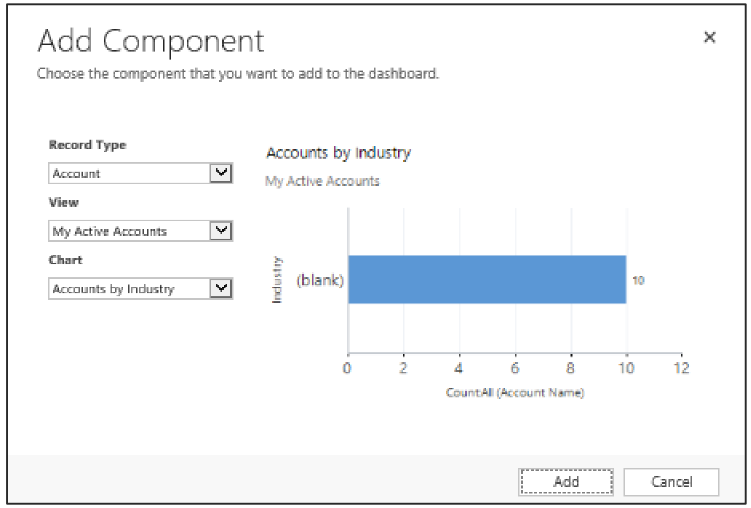


3 Enter a name for the dashboard.

Add a chart or list to a new dashboard

To add a chart or list to a new dashboard, choose the **Insert Chart** or **Insert List** icon in the component square you want to add the chart or list to. This opens the **Add Component** dialog box.





Note: If you're connected to Microsoft Social Engagement, you'll see an extra icon (for the Microsoft Social Engagement wizard) in the component square.

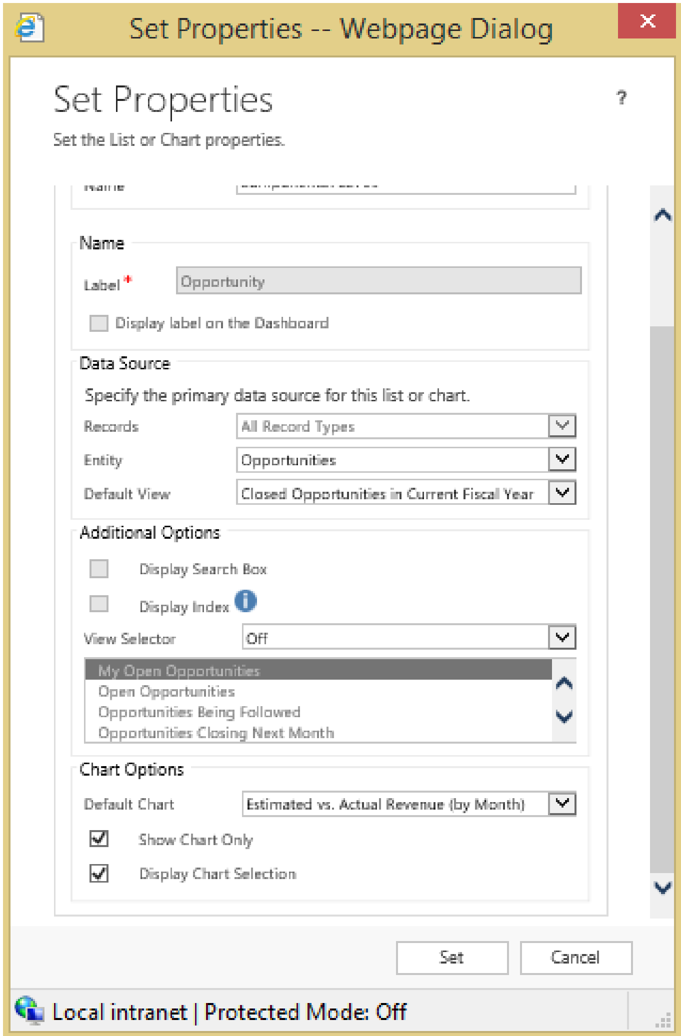
Change list or chart options

To change basic list or chart options from the dashboard layout screen, just double-click the chart or list you want to change. Then use the **Set Properties** dialog box to select the options you want.

Options that apply to lists and charts

Options that apply just to lists

Options that apply just to charts



Note: You must set certain types of options in the underlying chart or list. For example, to change the type of chart (column, bar, pie, etc.), the legend, or horizontal axis labels, change the underlying chart.

List options you can set from a dashboard

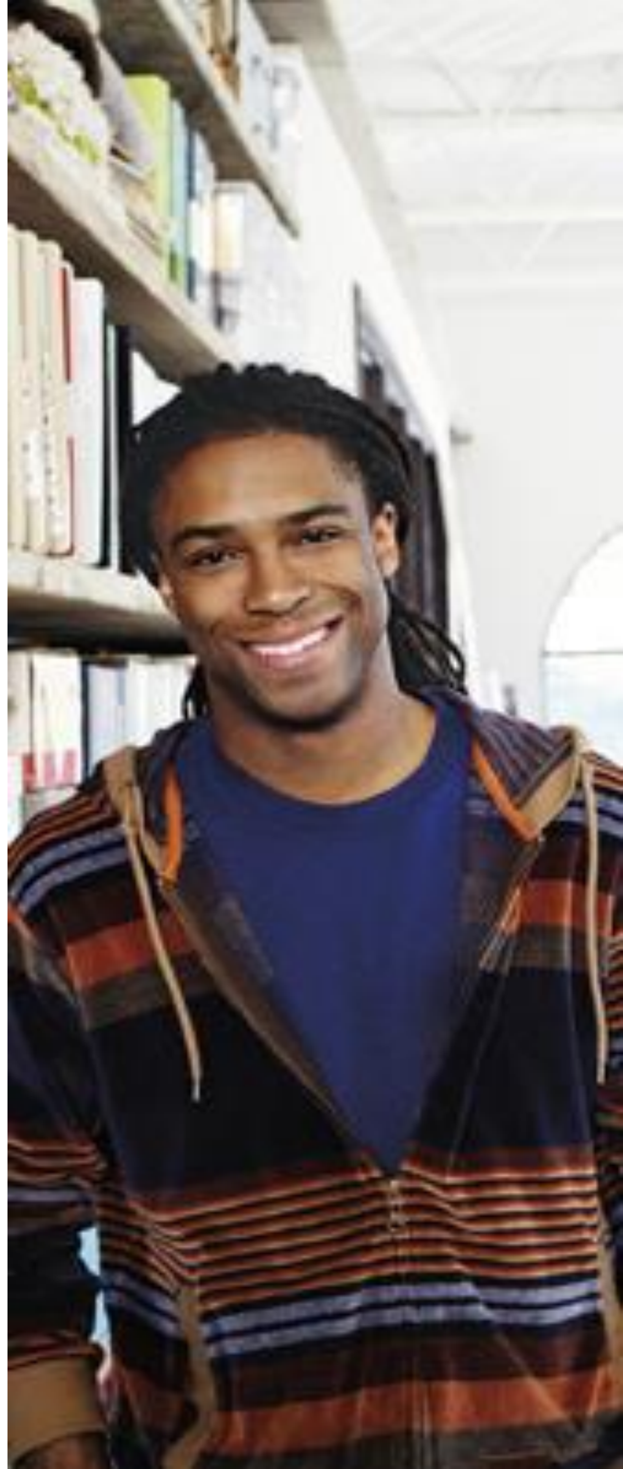
Option	Description
Name	Contains a unique ID used to identify the list. CRM suggests a value for **Name** but you can change it.
Label	Add a label.
Entity	The record type that the list is based on. This value determines the values available for **Default View**.
Default View	The view used for the list when the dashboard is opened. A user can change the view but the list will revert to **Default View** the next time the dashboard is opened.
Display Search Box	Displays or hides the search box.
Display Index	Displays or hides the A to Z filters at the bottom of a list.
View Selector	Select **Off** to remove the view selector from the list. Select **Show All Views** to allow users to select any system view when they use the dashboard. To limit the available views, select **Show Selected Views**, hold down the Ctrl key, and then select the specific views for the list.

Chart options you can set from a dashboard

Option	Description
Name	Contains a unique ID used to identify the chart. CRM suggests a value for **Name** but you can change it.
Label	Add a label.
Entity	The record type that the chart is based on. This value determines the values available for **Default View** and **Default Chart**.
Default View	The view that provides the data for the chart. The available values are determined by **Entity**.
Default Chart	The chart that's shown when the dashboard is first opened. A user can change the type of chart if the **Display Chart Selection** option is turned on, but the chart will revert to **Default Chart** the next time the dashboard is opened.
Display Chart Selection	Select this check box if you want users to be able to change the type of chart (column, bar, pie, etc.) that's displayed when they're using the dashboard. The chart type reverts to **Default Chart** when the dashboard is closed.

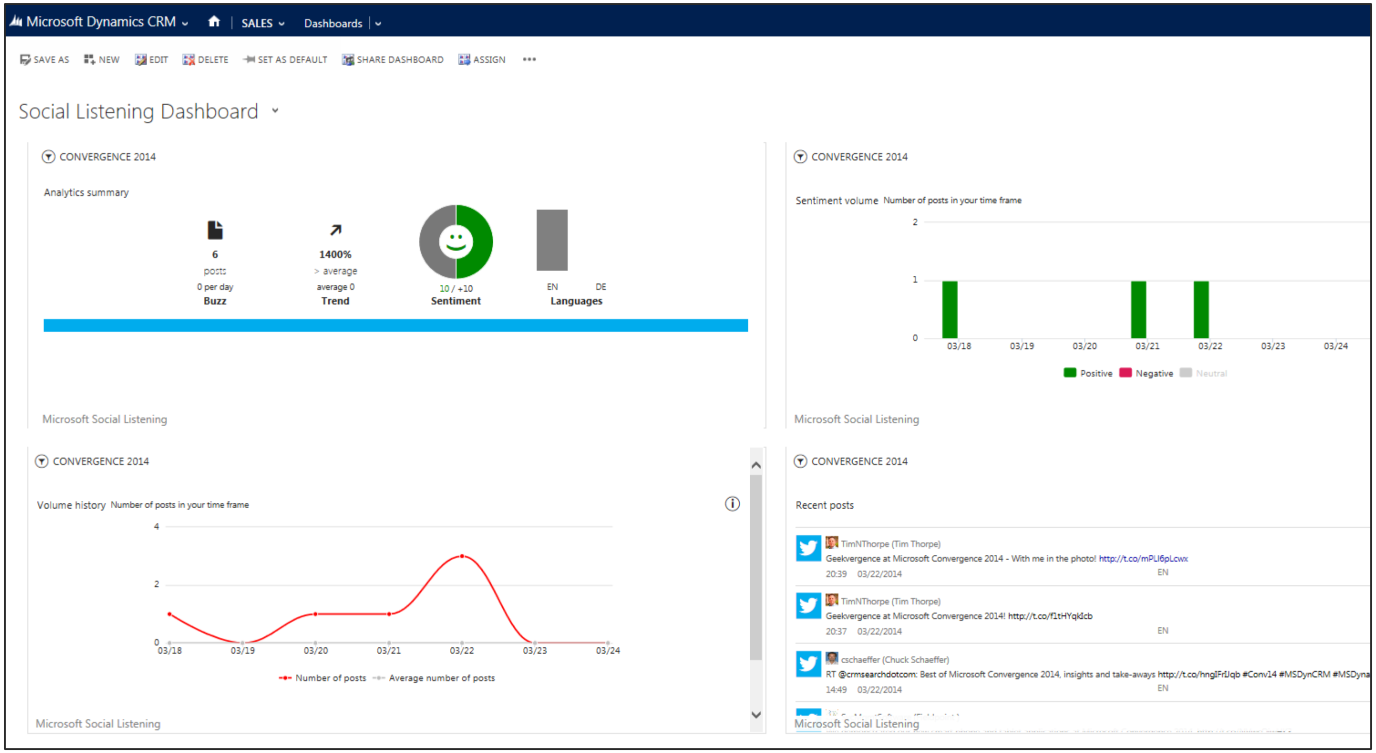
What else can you do with dashboards?

It's easy to add lists and charts to your CRM dashboards, but what if you want to go beyond standard lists and charts? CRM provides flexible tools that enable you to do many amazing things with your dashboards.



Go social!

You can take advantage of Microsoft Social Engagement to hear what people are saying on social networks like Facebook, Twitter, YouTube, and blogs. Then add Social Engagement charts to your dashboards.



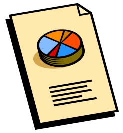
Tip: To learn more about Microsoft Social Engagement for CRM, see the Microsoft Social Engagement for CRM eBook.

Add a webpage or other web item

You can use special components called iframes and web resources to extend your dashboards in several ways. For example, you could use an iframe or web resource for any of the following:

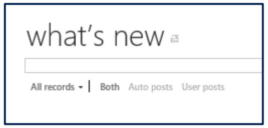
Add immediate access to a SharePoint site

Add an industry news page



Add an external chart, list, or report from another app

Add training instructions



Add an activity feed

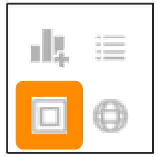
- Use an **iframe** to display a webpage or to run a web app. You can use an iframe to refer to sources outside your domain.
- Use a **web resource** to display an HTML page or an image, or to run a Silverlight application or JavaScript code. Web resources are stored on a Microsoft Dynamics CRM server.

Use an iframe to add a webpage or web app

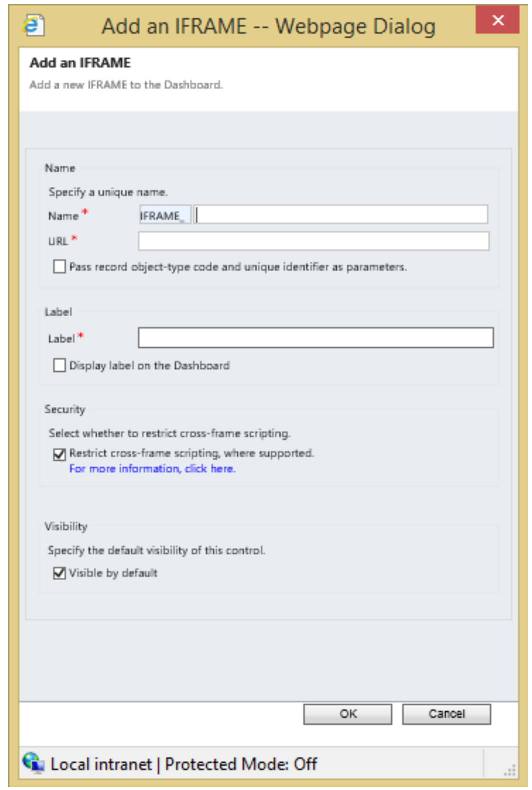
1 Open an existing dashboard or create a new dashboard as described earlier in this eBook.

2 Do one of the following:

- If you’re creating a new dashboard, choose the **Insert iframe** icon.
- If you’re modifying an existing dashboard, choose **Iframe** at the top of the layout screen.



3 In the **Add an iframe** dialog box, in the **URL** field, enter a URL for a webpage or web app. For example, enter a URL for a SharePoint site.



4 If you’re referring to an external website, you may need to clear the **Restrict cross-frame scripting, where supported** check box.

> **Note:** CRM blocks cross-frame scripting by default because scripts from other websites can include malicious code. You may want to restrict cross-site scripting for external sites you don't trust. For more information, choose the link below the **Restrict cross-frame scripting** check box.

5 Choose **OK** to add the iframe to the dashboard.

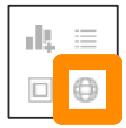
Add a web resource

1 Create the web resource. For example, you could use the built-in web resource text editor to create a training page..

2 Open an existing dashboard or create a new dashboard as described earlier in this eBook.

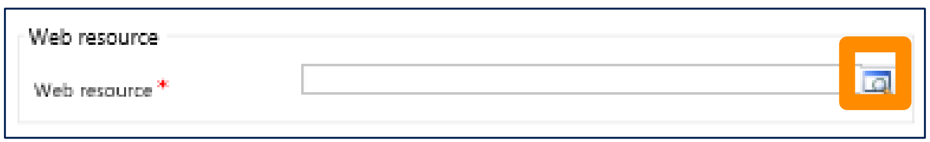
3 Do one of the following:

- If you’re creating a new dashboard, choose the **web resource** icon.



- If you’re modifying an existing dashboard, choose **Web Resource** at the top of the dashboard layout screen.

4 In the **Add Web Resource** dialog box, choose the Lookup button to search for the web resource.



5 Select the web resource, and then choose **OK**.

Thanks for reading!

Did this eBook help you?

Send us a quick note.

We'd love to know what you think.

CRM Help & Training

Version 7.1