

CASE STUDY

CUSTOM DEVELOPMENT OF SALES PERFORMANCE DASHBOARD USING POWER BI



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ABOUT CLIENT

The client is a prominent industrial services provider headquartered in Germany. Their specializations include insulation, access and surface protection, passive fire protection, and interior outfitting.

BUSINESS NEED

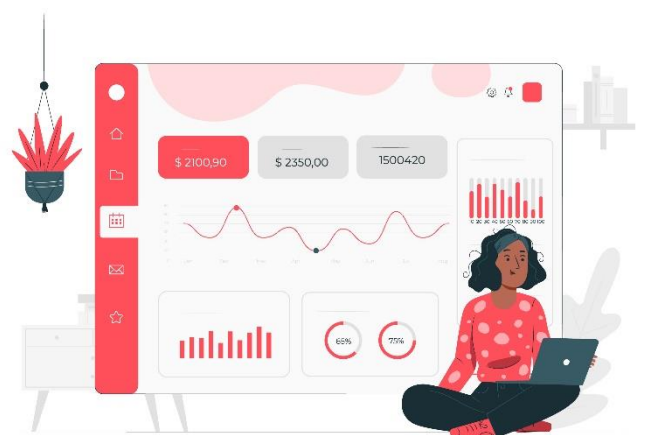
- The client spent a lot of time and effort to generate sales reports which adversely affected their business-decision making.
- The sales performance data would not integrate with their CRM, ERP, etc.
- Additionally, the client had challenges in controlling their staff's accessibility to reports based on the hierarchy set in their CRM.
- They also wanted the sales performance reports to reflect currencies based on geographies.

CCS SOLUTION

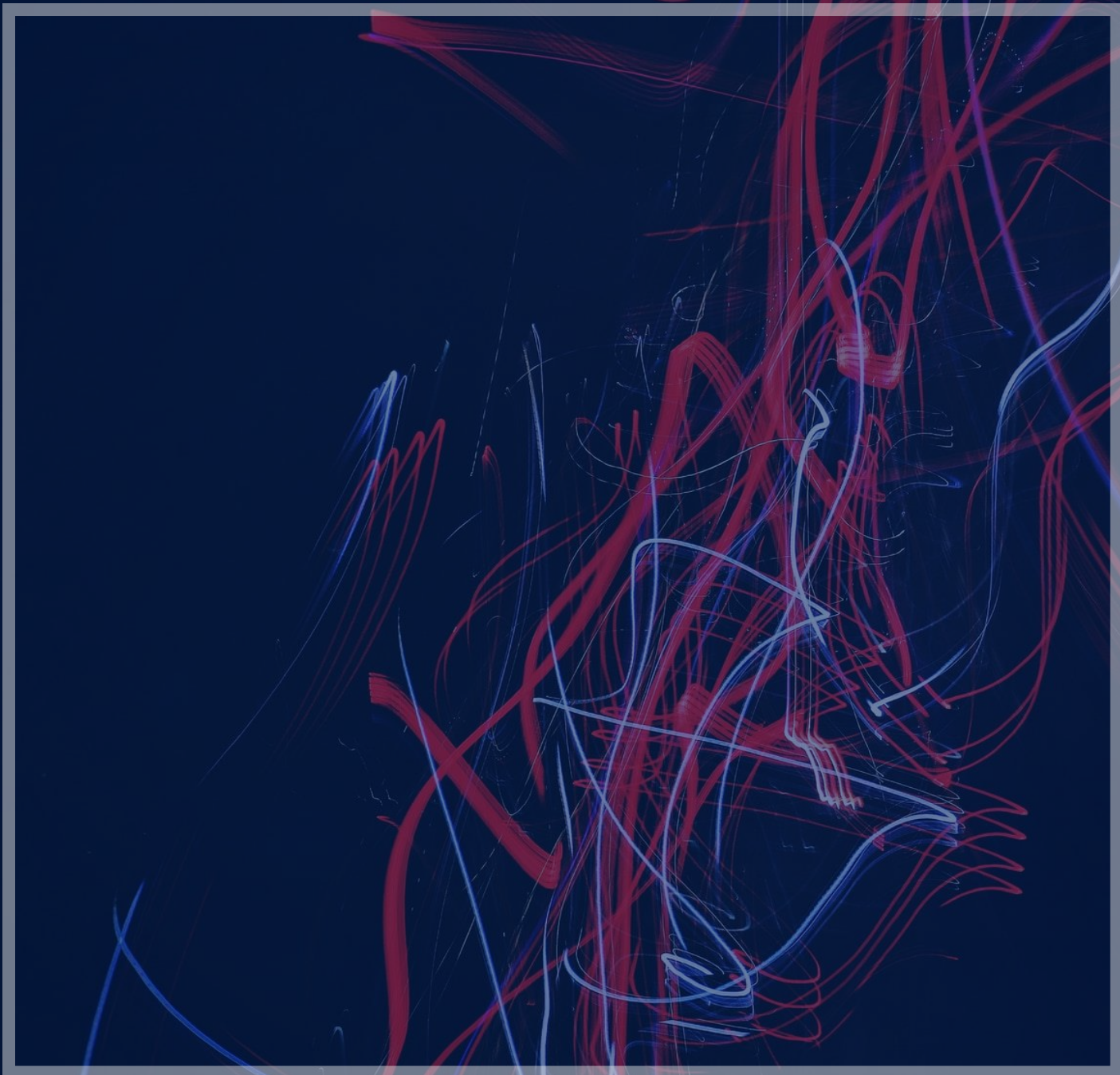
- CCS Engineers integrated sales performance reports in the client's Microsoft Dynamics 365 CRM using web API.
- Imported the client's resource hierarchy from the CRM to Power BI and applied row-level security (RLS) to the data.
- Collected the currency exchange rate from the CRM and made it possible for the staff to avail geography-based currencies in their reports.

BUSINESS BENEFITS

- The client's staff can access the sales performance dashboard from anywhere using their Microsoft Office account without compromising security.
- Significantly reduced internal operating costs as it became easier to analyse sales reports.
- The highly user-friendly interface and interactive visuals appealed to their staff and were readily adopted.
- Reports provided sales insights that helped managers make business decisions.



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- The client can share sales performance dashboards providing granular sales metrics with specific users.
 - RLS with Power BI helped client restrict access to sales dashboard based on hierarchy.



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