

Kickstart your Power BI project:
Integration with
Dynamics 365 & Power BI
made easy





Introduction

This whitepaper will provide you with practical tips and resources to get you up and running with your Power BI project. We will also look at how BIRDS can help to shorten the Power BI learning curve and make Power BI for Dynamics 365 an easy process. So, let's get started!



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Integrating Power BI & Dynamics 365: Challenges & solutions

Integrating Power BI with Dynamics 365 can be a complex process, but understanding and addressing the common challenges can help you overcome any obstacles and ensure a successful integration. In this section, we will discuss some of the common challenges faced when integrating Power BI with Dynamics 365 and provide solutions to help you navigate these challenges effectively.

Data connectivity

One of the main challenges is ensuring seamless data connectivity between Power BI and Dynamics 365. This can be particularly challenging when dealing with large volumes of data or when integrating multiple functional Dynamics 365 areas or companies. To overcome this challenge, it is essential to carefully plan and design the data integration process, taking into consideration the specific requirements of your Dynamics 365 implementation.

Data consistency

Another challenge is data consistency and accuracy. Power BI relies on accurate and up-to-date data to generate meaningful insights and visualisations. However, in a dynamic business environment, data consistency can be compromised due to various factors such as data entry errors or data integration issues. To address this challenge, it is crucial to implement robust data validation and cleansing processes. Additionally, regular data audits and monitoring can help identify and rectify any inconsistencies in the data.

Security, control & expertise

Security and access control is another critical challenge when integrating Power BI with Dynamics 365. It is essential to ensure that the right users have the appropriate access to data and reports within the Power BI platform. This can be achieved by using the Active Directory as a source of data access and add rights on specific areas on a granular level within Power BI. Lastly, a common challenge is the lack of expertise or knowledge in utilising the full capabilities of Power BI and Dynamics 365. To overcome this, investing in training and education for your team can help bridge the knowledge gap and ensure that they are equipped with the necessary skills to leverage the power of these platforms effectively. Additionally, partnering with a trusted and experienced Power BI and Dynamics 365 consulting firm, like BIRDS, can provide expert guidance and support throughout the integration process.



BIRDS Data warehouse automation: Simplifying the integration process

BIRDS Data warehouse automation is a game-changing solution that simplifies the integration process between Power BI and Dynamics 365. When integrating these two powerful platforms, managing data can become complex and time-consuming. However, with BIRDS data warehouse automation tools, you can streamline the integration process, saving time and effort.

Why BIRDS Data Warehouse automation?

One of the main benefits of BIRDS data warehouse automation is its ability to automate the extraction, transformation, and loading (ETL) process. This process involves extracting data from various sources, transforming it to meet your business needs, and loading it into the BIRDS data warehouse for analysis. BIRDS data warehouse automation tools can automate these steps, reducing the need for manual intervention and ensuring data consistency and accuracy.



Seamless integration with Dynamics 365

BIRDS offers seamless integration with Dynamics 365 applications such as Dynamics 365 BC (formerly known as Dynamics NAV), Dynamics 365 Customer Engagement (formerly known as Dynamics CRM), and Dynamics 365 F&O (formerly known as AX). With BIRDS data warehouse automation tools specifically designed for Power BI and Dynamics 365 integration, you can easily connect to these applications and automate the ETL process.

Automating the ETL process

By automating the ETL process, BIRDS data warehouse automation tools simplify the integration process, enabling you to quickly and efficiently extract data from your Dynamics 365 applications, load it into your BIRDS data warehouse and transform it into a format suitable for analysis in Power BI. This automation eliminates the need for manual data entry or manipulation, reducing the risk of errors and ensuring data accuracy.

Advanced features of BIRDS data warehouse automation

Furthermore, BIRDS data warehouse automation tools offer advanced features such as data mapping, data validation, and data cleansing. These features enable you to map data fields from your Dynamics 365 applications to corresponding fields in Power BI, validate the data for consistency and accuracy, and cleanse the data to remove any inconsistencies or errors. This ensures that your data is of high quality and ready for analysis in Power BI.



The challenge of Tony's Chocolonely

"We are a fairly young company, we have been around since 2005 now, and as of last year we are also operating in the United States. In Portland in the state of Oregon to be precise. To monitor well there too, the BI tool is essential for us. Especially good sales analyses help us to see whether our marketing activities are also producing the desired returns. We can't get that from the existing NAV environment; we really need a good BI solution for that. With BIRDS, we have found this solution".



BIRDS: Game-changing solution shortening the learning curve

If you're looking to shorten the learning curve when it comes to integrating Power BI with Dynamics 365, then BIRDS (www.birds.bi) is the game-changing solution you need. BIRDS offers specific features and tools that make the integration process easier and more efficient, helping you get up and running with Power BI in no time.

Seamless Dynamics 365 integration

One of the main challenges is ensuring seamless data connectivity between Power BI and Dynamics 365. This can be particularly challenging when dealing with large volumes of data or when integrating multiple functional Dynamics 365 areas or companies. BIRDS delivers an out of the box data warehouse and data model, that overcomes these challenges, and provides you with a BI foundation within days that gives you insights over multiple companies and functional areas like sales and inventory..

Pre-built templates & dashboards

In addition to its integration capabilities, BIRDS also offers a range of tools that can help you shorten the learning curve when it comes to Power BI. For example, BIRDS provides pre-built templates and dashboards that are specifically designed for Dynamics 365, making it easy for you to create visualisations and reports that are tailored to your business needs. These templates and dashboards serve as a starting point for your Power BI project, allowing you to quickly get started and customise them to fit your requirements.

Training & support

Furthermore, BIRDS offers comprehensive training and support resources to help you learn Power BI quickly and effectively. Whether you're a beginner or an advanced user, BIRDS has resources that can help you enhance your skills and make the most of Power BI. From video tutorials to step-by-step guides, BIRDS provides a wealth of information to help you become proficient in using Power BI for Dynamics 365.



Using BIRDS to streamline Dynamics & Power BI integration

BIRDS is an innovative solution that can greatly simplify the process of integrating Power BI with Dynamics 365. With its seamless integration capabilities and range of tools, BIRDS is designed to streamline the integration process and help you get up and running with Power BI in no time.

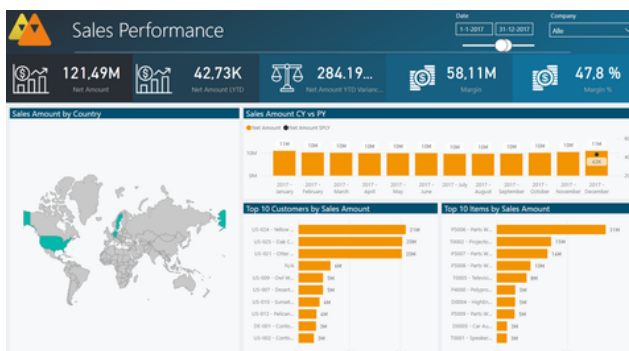
Pre-defined Power BI dashboards

One of the key benefits of using BIRDS is its ability to seamlessly connect to Dynamics 365. This means that you can easily extract data from these applications and use it for analysis in Power BI, without the need for complex data extraction processes. BIRDS simplifies the data integration process, saving you valuable time and effort.



Save 25% of your time

In addition to its integration capabilities, BIRDS offers a range of tools that can help you shorten the learning curve when it comes to Power BI. BIRDS provides pre-built templates and dashboards that are specifically designed for Dynamics 365, making it easy for you to create visualisations and reports that are tailored to your business needs. These templates and dashboards serve as a starting point for your Power BI project, allowing you to quickly get started and customise them to fit your requirements.



BIRDS provides accurate & reliable data

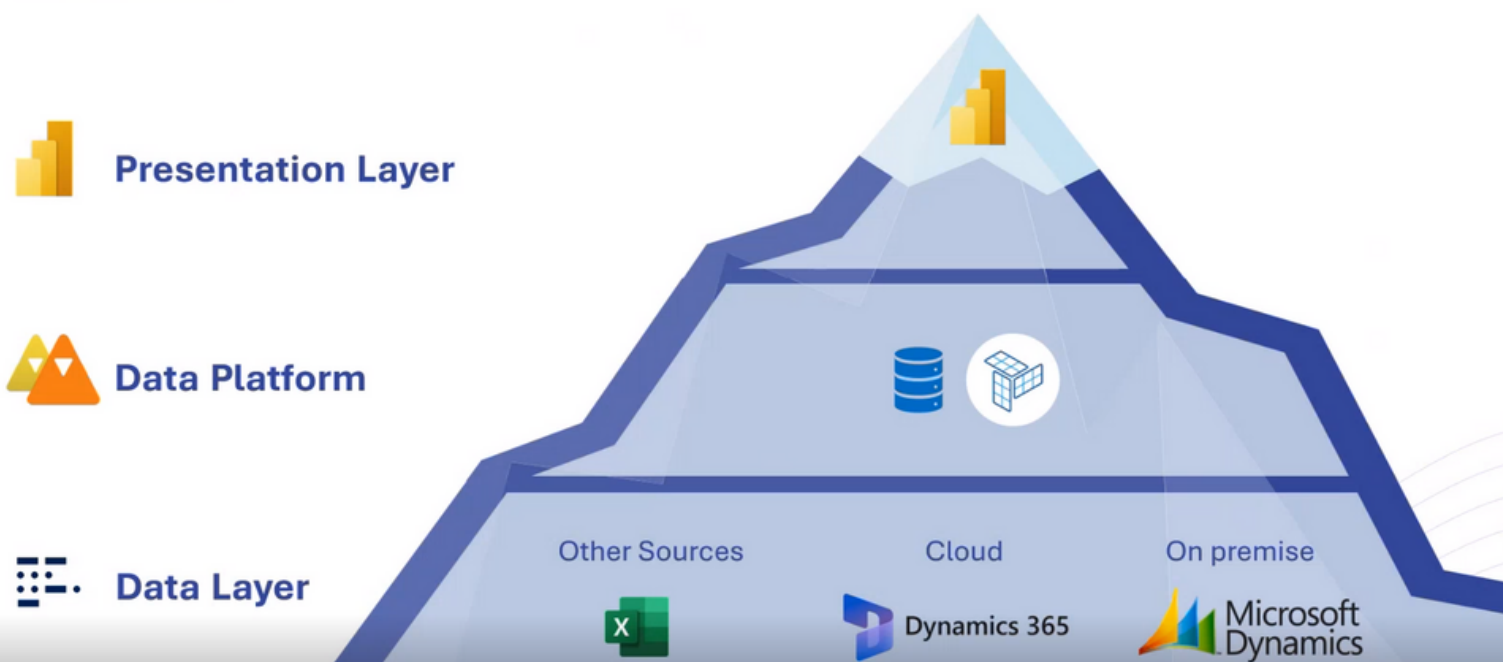
With BIRDS, you can take your insights to the next level. BIRDS provides features such as data mapping, data validation, and data cleansing, ensuring that your data is accurate and reliable. You can map data fields from your Dynamics 365 applications to corresponding fields in Power BI, ensuring that you are analysing the right data. Additionally, BIRDS data validation and cleansing features help identify and rectify any inconsistencies or errors in your data, ensuring that you have high-quality data for analysis.

Training & support

Furthermore, BIRDS offers comprehensive training and support resources to help you learn Power BI quickly and effectively. Whether you're a beginner or an advanced user, BIRDS has resources that can help you enhance your skills and make the most of Power BI for Dynamics 365. From video tutorials to step-by-step guides, BIRDS provides a wealth of information to help you become proficient in using Power BI.

With BIRDS, you can streamline the integration process between Power BI and Dynamics 365, making it easier for you to extract, transform, and load data for analysis. By leveraging BIRDS' capabilities, you can maximise the value of your Dynamics 365 data and gain valuable insights to drive business growth and success.

The solution? A proven Data Platform



Get to know BIRDS

a solution that makes using Power BI easier for people.



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More information?

Schedule a meeting with our BI expert, Joep Lugtenberg.

[Schedule meeting](#)