



m-hance  
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## Power BI Reporting for NfP 365 Customer Relationship Management (CRM)

### Visual analysis

Your organisation can view quick, visual and interactive reports of core areas of your NfP 365 solution.

### Share reports

Reports can be easily shared with your colleagues via Power BI online with automated data refreshes.

### Instant and accurate reports available at your fingertips

For fundraising and marketing teams within charitable organisations, understanding the performance of your campaigns is essential for you to be able to measure what's been a success and what has been less so.

Inbuilt reporting within Microsoft Dynamics 365 Sales and Service, although serving a purpose, does have some limitations with the volume of content/records, but also with the way it can be shared within organisations.

There is an expectation for reports to be easy to read and share and to be available on any device, at any time and from wherever you are.

This is why we created our Power BI reporting module for our NfP 365 CRM suite of products; taking the existing reporting capabilities within Dynamics 365 Sales and Service to another level.

## Mobile compatible

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Power BI is fully mobile compatible meaning you can access it on the move from wherever you are.

## Multiple data sources

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Add-on capabilities include the ability to link to other data sources for complete 360 degree view reporting.

Contact our  
team:

## Power BI Reporting

### What's Included:

Our Power BI reporting pack for our NfP 365 CRM suite of solutions comes with a pre-defined set of reports covering the following areas:

- Contacts • Accounts
- Income (Overview, Analysis and Current Year vs Prior Year Analysis)
- Opportunities • Volunteering
- Awards/Grants • Events • Donor Attrition
- Engagement • Case Management

### Key Features and Benefits:

- Data driven and visual reporting, providing drill-down levels for summarised and detailed reporting as required
  - Desktop and Cloud allows users to create reports within a desktop environment and publish to the Cloud for a wider audience to access
  - Report viewers will not need NfP 365 access or licenses as reports are viewed directly through Power BI via a Power BI Pro License
  - Reports are viewed directly through Power BI so viewers will not require access to NfP 365 Finance
  - Within the Cloud, reports can be scheduled to automatically update hourly, daily or weekly
  - Seamless integration with PowerPoint means that reports can be converted into reporting/board packs at the click of a button
  - If the data is held within NfP 365 then our Power BI reporting pack can report on it