

# Microsoft Dynamics CRM 2011: Dashboards Cookbook

*By Mark AuCoin*

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## Microsoft Dynamics CRM 2011: Dashboards Cookbook By Mark AuCoin

Figuring out Dashboards in Microsoft Dynamic CRM doesn't have to be complicated. The smart way to learn is by following these 50+ recipes that help you visualize your CRM data clearly and communicatively.

- Take advantage of all of the latest Dynamics CRM dashboard features for visualizing your most important data at a glance.
- Understand how iFrames, chart customizations, advanced WebResources and more can improve your dashboards in Dynamics CRM by using this book and eBook.
- A highly practical cookbook bursting with a range of exciting task-based recipes for mastering Microsoft Dynamics CRM 2011 Dashboards.

### In Detail

Microsoft Dynamics CRM 2011 offers you access to exciting new interactive and flexible Dashboards that contain any combination of Charts, Lists, iFrames and Silverlight components. These can be used to easily visualize your CRM data and provide you with a light BI interface, all of which this practical cookbook will enable you to utilize.

At first glance, Dashboards and their myriad information can be overwhelming to users that are new to the Dynamics CRM 2011 interface. This book guides you through navigating and interacting with Dashboards in a simple and easy to follow manner, and builds on that experience to walk you through creating and sharing your own User Dashboards.

"Microsoft Dynamics CRM 2011: Dashboards Cookbook" offers a range of practical recipes for mastering dashboard navigation, interaction, and building custom Dashboards in Dynamics CRM. You will immediately get to grips with essential tasks like changing Dashboard settings and sharing Dashboards with other members in the CRM team, as well as adding custom components like iFrames and Lists. Along the way you will also follow the creation of a simple HTML WebResource that can be added to your Dashboard.

By the end of "Microsoft Dynamics CRM 2011: Dashboards Cookbook", you will be fully equipped to take advantage of the exciting new Dashboards features of Dynamics CRM 2011.

### **What you will learn from this book**

- Quickly get up and running with navigation and basic interaction with Dashboards in the Dynamics CRM 2011 interface
- Drill down and focus on slices of data that are represented in Dashboard Charts
- Learn to filter and sort data records when viewed in combination with a Chart component
- Master both the creation of a new User Dashboard and personalizing the layouts of an existing Dashboard
- Take advantage of sharing and assigning User Dashboards to other CRM users and teams
- Manipulate your User Dashboard by editing Chart and List components
- Tackle working with iFrames, WebResources, XML and SSRS from a Dashboard
- Extend the data on your dashboard with advanced Chart XML

### **Approach**


"Microsoft Dynamics CRM 2011: Dashboards Cookbook" is packed with practical step-by-step recipes covering tasks which utilize all of the new dashboard features of Dynamics CRM 2011.

### **Who this book is written for**

If you are a developer who is excited about creating, customizing, and designing Dashboards in Dynamics CRM 2011, this book is for you.

You should be comfortable with general Dynamics CRM functionality for this or a previous release. This book may also be valuable to End Users and Power Users interested in the new Dashboard features of this release.

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## Microsoft Dynamics CRM 2011: Dashboards Cookbook By Mark AuCoin Bibliography

- Sales Rank: #2390022 in Books
- Published on: 2012-01-18
- Released on: 2012-01-18
- Original language: English
- Number of items: 1
- Dimensions: 9.25" h x .60" w x 7.50" l, 1.02 pounds
- Binding: Paperback
- 266 pages

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## **Editorial Review**

About the Author

### **Mark AuCoin**

Having been in the industry since 1992, Mark AuCoin has been involved in many different software projects. Starting out in application development, he learned about business needs while building robust client/server and ERP systems using Microsoft and Java development tools. Migrating to the internet, he was able to leverage his years of database and reporting skills to create business class web-enabled applications. Then a funny thing happened - Microsoft CRM. Mark was impressed with the ability to focus more on the business needs and "what" needs to get done instead of worrying so much about "how" it was going to get done. Since diving into Dynamics CRM in 2006, Mark took his own Dynamics CRM mobile solution to market, attained Microsoft Virtual Technical Specialist status for CRM and is a CRM Solution Specialist for Navantis Inc, which won the 2010 CRM Solution Partner of the Year award from Microsoft Canada.

## **Users Review**

**From reader reviews:**

### **Helen Thibodeaux:**

This Microsoft Dynamics CRM 2011: Dashboards Cookbook are usually reliable for you who want to certainly be a successful person, why. The reason why of this Microsoft Dynamics CRM 2011: Dashboards Cookbook can be on the list of great books you must have is usually giving you more than just simple reading through food but feed you actually with information that probably will shock your earlier knowledge. This book is actually handy, you can bring it just about everywhere and whenever your conditions both in e-book and printed people. Beside that this Microsoft Dynamics CRM 2011: Dashboards Cookbook giving you an enormous of experience like rich vocabulary, giving you demo of critical thinking that we all know it useful in your day pastime. So , let's have it appreciate reading.

### **Kurt Haney:**

The reason why? Because this Microsoft Dynamics CRM 2011: Dashboards Cookbook is an unordinary book that the inside of the book waiting for you to snap the item but latter it will surprise you with the secret the item inside. Reading this book close to it was fantastic author who also write the book in such amazing way makes the content interior easier to understand, entertaining approach but still convey the meaning totally. So , it is good for you because of not hesitating having this nowadays or you going to regret it. This book will give you a lot of benefits than the other book have such as help improving your proficiency and your critical thinking approach. So , still want to postpone having that book? If I ended up you I will go to the publication store hurriedly.

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