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BI Project

For a Leading Company in the Large-Scale Retail Sector

Power BI

The client

A leading company in the large-scale retail secto

A leading company in the large-scale retail sector that has earned customer trust through passionate commitment to product quality control, protection of purchasing power, and education in conscious consumption.

The need

To perform highly customized analyses

The Customer Service Office prepares periodic reports on ticket management from various channels (email, phone, web portal, and social media), segmented by request type, user type, and topic.

The data resides in a cloud-based CRM (Dynamics 365), which includes a powerful reporting tool that, however, did not meet all management needs.

The internal reporting tool within the CRM, however powerful, did not cover all the needs of management.

It therefore became necessary to switch to more powerful Business Intelligence tools that would allow for customised analysis, also freeing the operator from the burden of manually extracting data in order to process it on other systems.

optimize the process of analysing business-related data

have an advanced and powerful analysis tool at your disposal

simplify and improve the performance of reports, eliminating manual extractions

The solution

Power BI, the market-leading BI solution

During the analysis phase, it became clear that the amount of data was significant, so it was decided to export the Dynamics 365 data to an SQL Server database on Azure and to use Analysis Service in the pre-processing phase to leverage the scalable computing power, effectively making the entire solution cloud-based and thus simplifying the implementation of ETL, thanks to the native connectors between the systems involved.

The data structure was revised to make it more suitable for the requirements.

The most flexible and modern tool for report writing, and therefore recommended to management, is Power BI, which uses a dynamic connection to Analysis Service. However, the data can also be accessed in the same way via Excel.

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The benefits

Completely Microsoft cloud-based solution.

Ability to scale computing power at runtime, as needed.

Consequent cost savings since the solution is available in "pay per use" mode.

Data centralization.

Easy connection to data..

Automatic synchronization.

Users can independently choose their reporting tool (Power BI/Excel).

The architecture


The implementation

The data was exported from Dynamics 365 to the SQL Server DB via Azure Data Factory, which in turn calls SSIS packages developed with KingswaySoft, a third-party tool fully integrated with Dynamics 365.

The data was selected and restructured using SQL views, which provided the basis for Analysis Service.

Pre-processing was performed on Analysis Service.

Finally, with the help of Power BI or Excel, the user independently developed reports by accessing
the data via a dynamic connection.
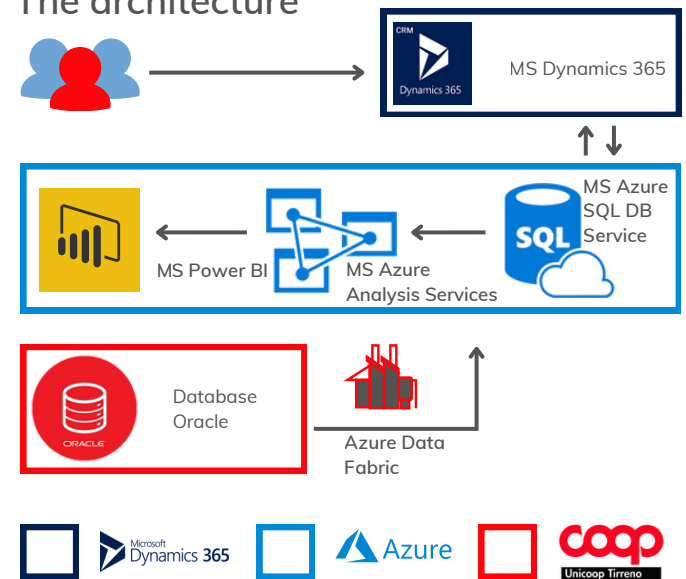
The results

Automated data updating has relieved users of the burden of manually extracting and reprocessing data.

The data, ad hoc restructured specifically for analysis purposes, is easy to consult, thereby simplifying the drafting of reports.

The use of highly integrated tools such as Power BI allows periodic reports to be updated with a simple click.

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