

Sikich Snapshot Charts™ for CRM

Sikich Snapshot Charts for CRM allows you to put CRM data into charts and dashboards. The dashboards are dynamic, allowing for in-place drill down, customization, and links to the underlying CRM data. This is a great tool to bridge the gap between the data collected in CRM and a quick snapshot of data to help you better understand customer behavior, analyze sales, identify opportunities for revenue and cost savings, and improve overall decision-making.

Sikich Snapshot Charts for CRM is designed to work with the Advanced Find tool found in Microsoft Dynamics CRM v4.0. Users create queries using Advanced Find. These saved queries represent the source data that you want to analyze. You then have the ability to configure the charts to display the data as desired. These charts are then combined to form dashboards - a graphical representation of your data.

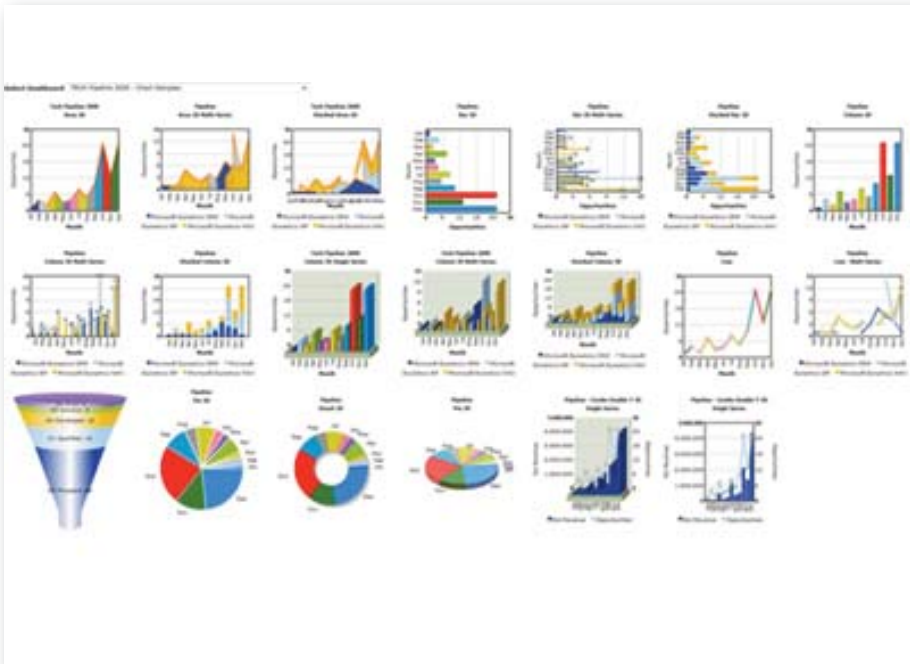
Snapshot Charts™ settings page

Feature	Description
Snapshot Dashboards	Pull your charts together into dashboards
Snapshot Entities	Utility table containing all entities in your system.
Snapshot Charts	Design your charts.
Snapshot Columns	Utility table containing all columns in your saved views.
Snapshot Widgets	Enter external or transactional data into CRM to be charted.
Snapshot Views	Utility table containing the details of all of your saved views.
Snapshot Charts System Defaults	Configure the system and individual default dashboards.
Snapshot Charts Refresh	Refresh the data used to create your charts.

Example Dashboard showing Stacked Column, 3D Column, Bar and Donut chart types



Dashboard demonstrating the available chart types in Sikich Snapshot Charts for CRM



Additional features

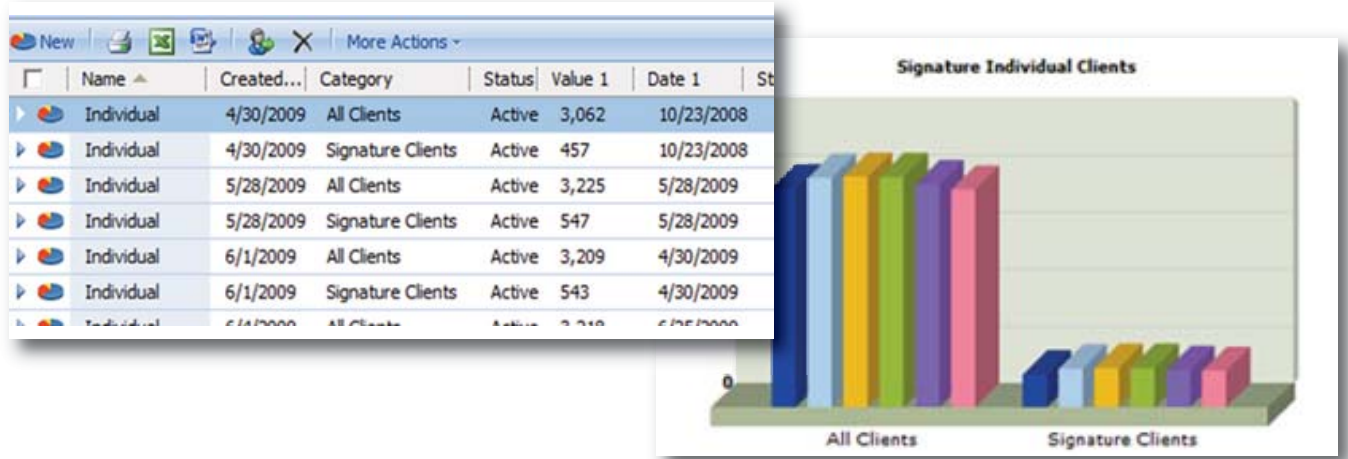
Beyond the basics of setting up and creating one of 20 chart types, Sikich Snapshot Charts for CRM has the following features to further enhance your use of these charts:

- **Drill through to original Advanced Find grid results for each slice of a chart** – A useful feature of Sikich Snapshot Charts for CRM is the ability to click on any slice of a chart to display the original source grid of data from the advanced find query that was used to render that chart.

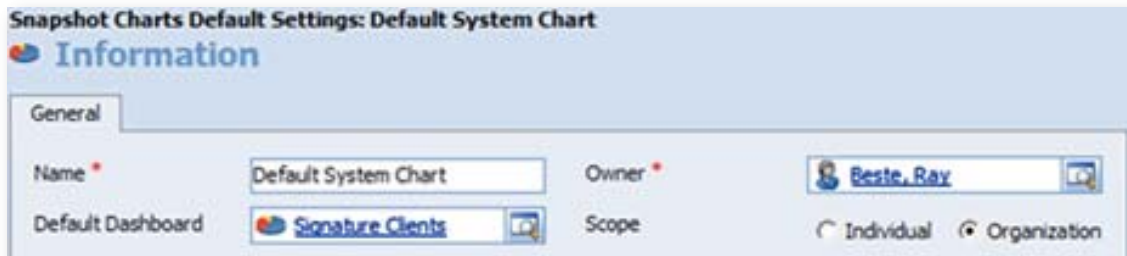
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- **Chart Options** – When defining each individual chart, there are several options to be able to configure the output of the chart.
- **Display Data Values** – Many times the display of data values can clutter the appearance of the chart. This option allows for the suppression of these values on a chart-by-chart basis.
- **Rotate Names** – When creating charts such as a Column Chart where the group labels appear along the bottom of the chart, if the labels are long and/or numerous, they may display on top of each other. This option will rotate the values to display vertically so they do not appear on top of each other.
- **Suppress Zeroes** – When creating certain charts, especially multi-series charts, many times there is no data for certain portions of your chart and displaying a bunch of zeroes takes away from the visual appeal. This option allows you to suppress just the zeroes and leave the remaining data values on the chart.
- **Captions** – You can optionally display up to 2 captions on a given chart.
- **Labels** – You can optionally label each element of your chart.
- **Width/Height** – You can optionally control the width and height of your chart to fit better onto the screen.

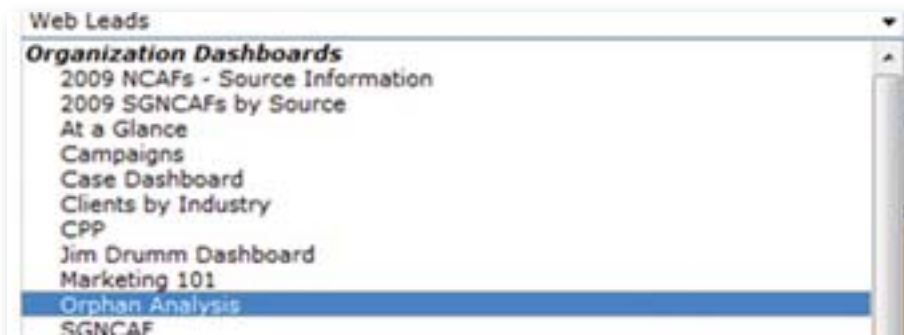
- **Aggregate options** – Sikich Snapshot Charts for CRM currently supports Average, Sum and Count aggregate values.
- **Date Grouping Options** – Sikich Snapshot Charts for CRM currently supports grouping dates by Day, Month or Year.
- **Single Series vs Multi-Series vs Combination** – Charts can be rendered as a single series (1 grouping), multi-series (2 groupings), or combination (1 grouping and 2 aggregates).
- **Widget Table** – Sometimes the data that you would like to chart is not within CRM and getting it into CRM in a format that is chartable is not feasible, yet, you would like that data to be displayed within one of your dashboards alongside the rest of your CRM data. The Widget table provides a storage place to use for this type of data so that you can perform an advanced find against that table and subsequently create a chart for it.



- **Setting a default dashboard system wide as well as for each use** – Through the Default Settings option, the system administrator sets which dashboard in the system should be the default dashboard if a particular user has not set one to be their default. Each user also has the option of setting a particular dashboard to be their default.

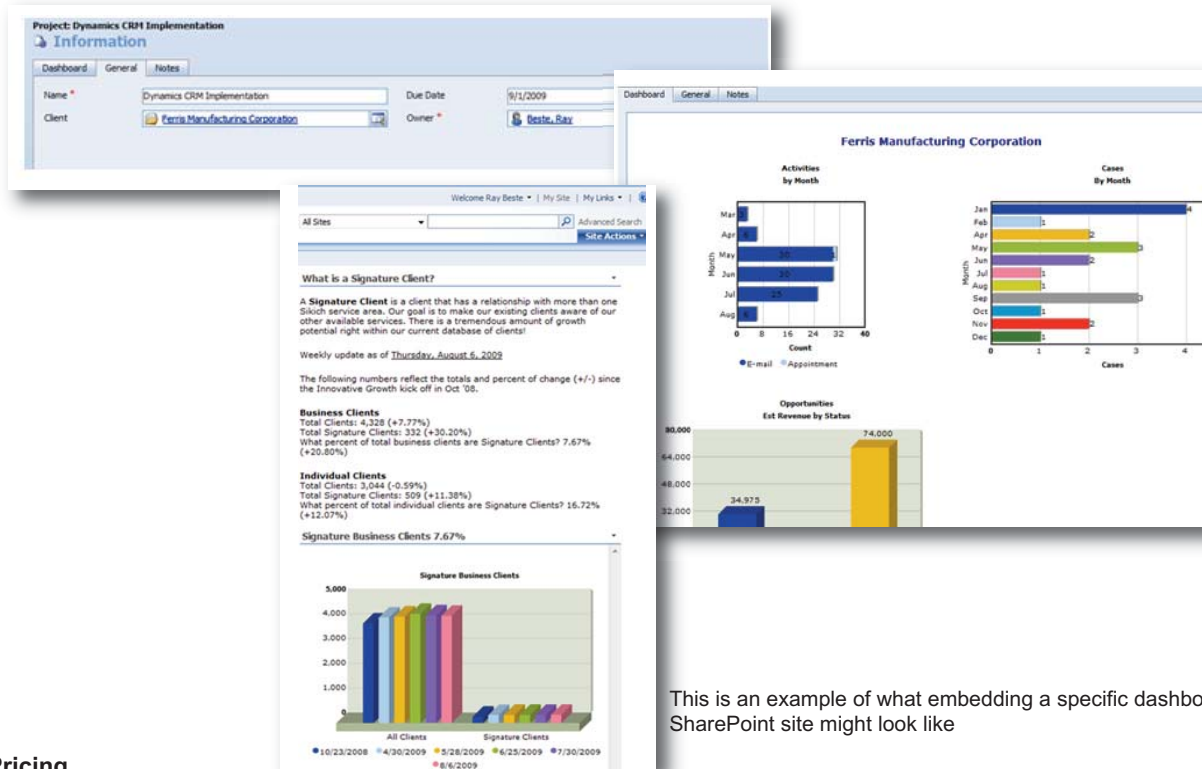


When creating a chart, you have the option to make it available to the organization or only for yourself. This is seen when selecting a dashboard to view.



- **Displaying specific dashboards in other applications and/or other areas of Microsoft Dynamics CRM** – You can create charts and dashboards for very specific use and placement within Microsoft Dynamics CRM or outside of Microsoft Dynamics CRM in applications such as SharePoint.

From within Microsoft Dynamics CRM, a specific dashboard can be placed anywhere in the sitemap navigation of your deployment by passing the GUID of the dashboard in question to the main form and placing that in your SITEMAP definition file. A dashboard 'at a glance' view is also configurable that would enable placing a dashboard as an iFrame on an entity form that would filter upon opening to the currently displayed record. This might look like the following:



This is an example of what embedding a specific dashboard into a SharePoint site might look like

Pricing

Sikich Snapshot Charts for CRM is licensed per organization based on the number of named users currently active in the system. Yearly maintenance entitles the owner to updates and new versions as they are released.

Number of CRM named users	License Fee	Year 1 cost w/maintenance
1-50 CRM Users	\$1,000	\$1,180
51-100 CRM Users	\$1,500	\$1,770
101-150 CRM Users	\$2,000	\$2,950
151-200 CRM Users	\$2,500	\$2,950
201+ CRM Users	\$3,000	\$3,540

18% yearly maintenance required first year
 Existing Sikich Dynamics CRM Customers get a 50% credit off of the license prices above

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