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Getting Started with Excel Templates in CRM

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Topics covered

- Use cases and feature comparisons
- Creating an Excel template from scratch
- Turning a template into a report or dashboard
- Useful Pivot Table tricks and ideas
- Use GetPivotData for "headline" figures
- Making the most of Slicers

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Use cases and feature comparison

- Dynamic Export to Excel
  - Stores original query
  - Users can modify and share their own local versions
  - "Approved" versions must be maintained outside CRM
  - "Refresh data from CRM" needs Outlook client
  - Add data from multiple entities or external data sources and "mash it up"

- Excel Template
  - Stores columns, but no filters
  - Users can create their own templates and share them
  - Templates managed in CRM. Users just get latest version.
  - No "refresh" – every use exports fresh data
  - Use Excel Online on mobile devices, no Excel needed

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Create an Excel Template from scratch

- ◄◄ **Settings** > **Templates** > **Document Templates**
- ◄◄ **New** > **Excel Template**
- ◄◄ Choose **Entity** & **Saved view to use***. **Edit columns** for more (or less) data. Click **Download File**
  * When finished template is used, data is filtered by <u>current</u> view
- ◄◄ "Do Excel stuff": add calculated columns, conditional formatting, Pivot Tables / Pivot Charts, Slicers…
- ◄◄ Save locally – template in CRM will use this filename
- ◄◄ In CRM click "Upload template", drag and drop

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Demo: Create a new Excel Template

Turning a template into a report or dashboard

- ◄ Add worksheets to separate data > calculations > output
  - ◄ Hide worksheets afterwards to tidy up
- ◄ Add layers of information
  - ◄ Use calculated columns to provide easy filtering eg month, year
  - ◄ Use conditional formatting to highlight outliers (eg top 5, bottom 10%), show variations using data bars, use heatmaps (cautiously)
- ◄ Summarise information using different dimensions
  - ◄ Customer, CRM user, date, type, priority, status reason…
- ◄ Use formatting to structure the output
- ◄ Hide gridlines and headings for "polished" report feel

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Demo: From Template to Report

Useful Pivot Table / Pivot Chart tricks and ideas

- ◄ Use number formats suitable for *summary* information
  - ◄ Eg display 1.20 M rather than $1,201,364.47
- ◄ Group date fields to generate month / quarter / year
- ◄ Use separate Pivot Tables for display and to drive charts
- ◄ Display values in more than one way, for example a total amount and the % contribution to the row or column
- ◄ Sort by values to show ranked information
- ◄ Filter by values to show top / bottom values only
- ◄ Hide Field Buttons on Pivot Charts to reduce clutter

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Demo: Pivot Table Features

Use GetPivotData to pull out "headline" figures

= GETPIVOTDATA("Revenue",   - field to return
  A4,   - any cell inside the PivotTable
  "Year", 2016,   - first category and value to match
  " Month", 5,   - next category / value
  " Region", "London")   - final category / value

◄ To return a result, the Pivot Table must show Revenue broken down by all three categories. If one category is missing, such as Month or Region, an error is returned.

◄ You can use no categories to retrieve the grand total.

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Demo: GetPivotData

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Making the most of Slicers

- Make sure your Slicers are connected to all relevant tables
- Format Slicers with useful colour choices
  - Similar or same colour for related dimensions, eg Month and Year are both "time", Salesperson and Region both internal divisions
  - Be consistent between different reports / dashboards as well
- Consider turning off "Show items with no data last"
  - Especially for values with obvious "order" to them such as dates, probability, priority, rating...
- Use multiple column layout for compact appearance
  - Ideal for months as 4 x 3 layout grouping months into quarters

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Demo: Using Slicers

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