9A SMART INSIGHTS

In-depth data-insights in Microsoft Fabric and Power BI

The data platform that structures and models Microsoft Dynamics data, making it available in Microsoft Fabric and Power BI for comprehensive reporting and in-depth analysis.



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PRODUCT PAPER

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The reporting reality in Dynamics

Basic reports don't deliver real insights

Microsoft Dynamics ERP and CRM systems are built to automate business processes and record transactions. But when organizations want to analyze their data, they often run into limitations.

The standard reporting options are fine for simple overviews but fall short when it comes to in-depth analysis across multiple data dimensions or combining information from different sources.

Power BI was introduced by Microsoft as a powerful analytics tool, but unlocking and modeling data from Dynamics 365 for use in Power BI often proves complex in practice. Organizations are left with questions like:

- How do I extract data from the complex Dynamics database into Power BI?
- How do I combine this data with other business applications?
- How do I structure and model data so it's easy to use?
- How do I ensure one central, reliable source of truth?
- How do I stay flexible and ready for new developments within Microsoft Fabric?

That's where 9A Smart Insights comes in.



9A Smart Insights in a nutshell

The end-to-end data platform for Microsoft Dynamics 365, Fabric, and Power BI

9A Smart Insights is the solution for organizations using Microsoft Dynamics that need deep data insights to support informed decision-making.

Built on Microsoft Fabric, our solution unlocks and structures Dynamics data and makes it immediately available for analysis in Power BI – including out-of-the-box reports for multiple business processes.

9A Smart Insights includes a flexible semantic data model in which all definitions and business logic specific to your organization are captured. This ensures that everyone is always working with the same version of the data.

Even colleagues without technical knowledge can build their own reports using our solution – giving them the insights they need to act.

Beyond Power BI, Microsoft Fabric provides advanced tooling for predictive analytics, real-time insights, and AI-driven applications. 9A Smart Insights feeds this tooling with structured data from Dynamics and other sources, giving you a solid foundation for your future data strategy.

The architecture

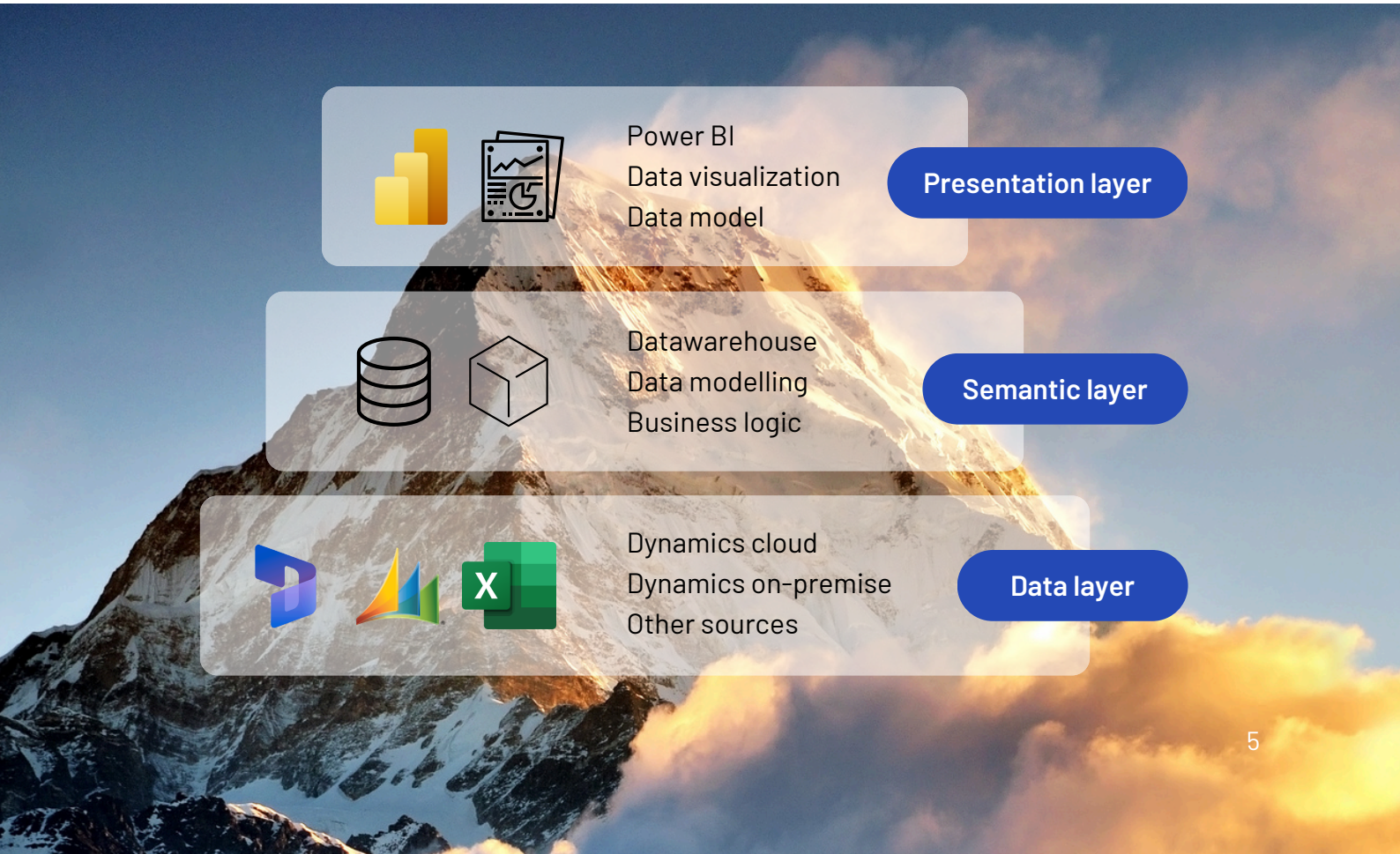
A visual overview of 9A Smart Insights

Our solution is built on three layers that transform data from source to report.

In the **Data layer**, data is extracted from Dynamics 365, earlier versions like AX 2012 and NAV, and other source systems. This includes both cloud and on-premises environments.

In the **Semantic layer**, data is structured and modeled within a central data model. All business logic and definitions are captured here, ensuring that everyone works with the same foundation. Power BI retrieves data from this layer, reducing the load on source systems. The model is fully documented.

In the **Presentation layer**, data is made available in Power BI and, where relevant, in Microsoft Fabric components such as OneLake and Direct Lake. Users can create reports using simple drag-and-drop functionality – no technical expertise required.



The underlying data model

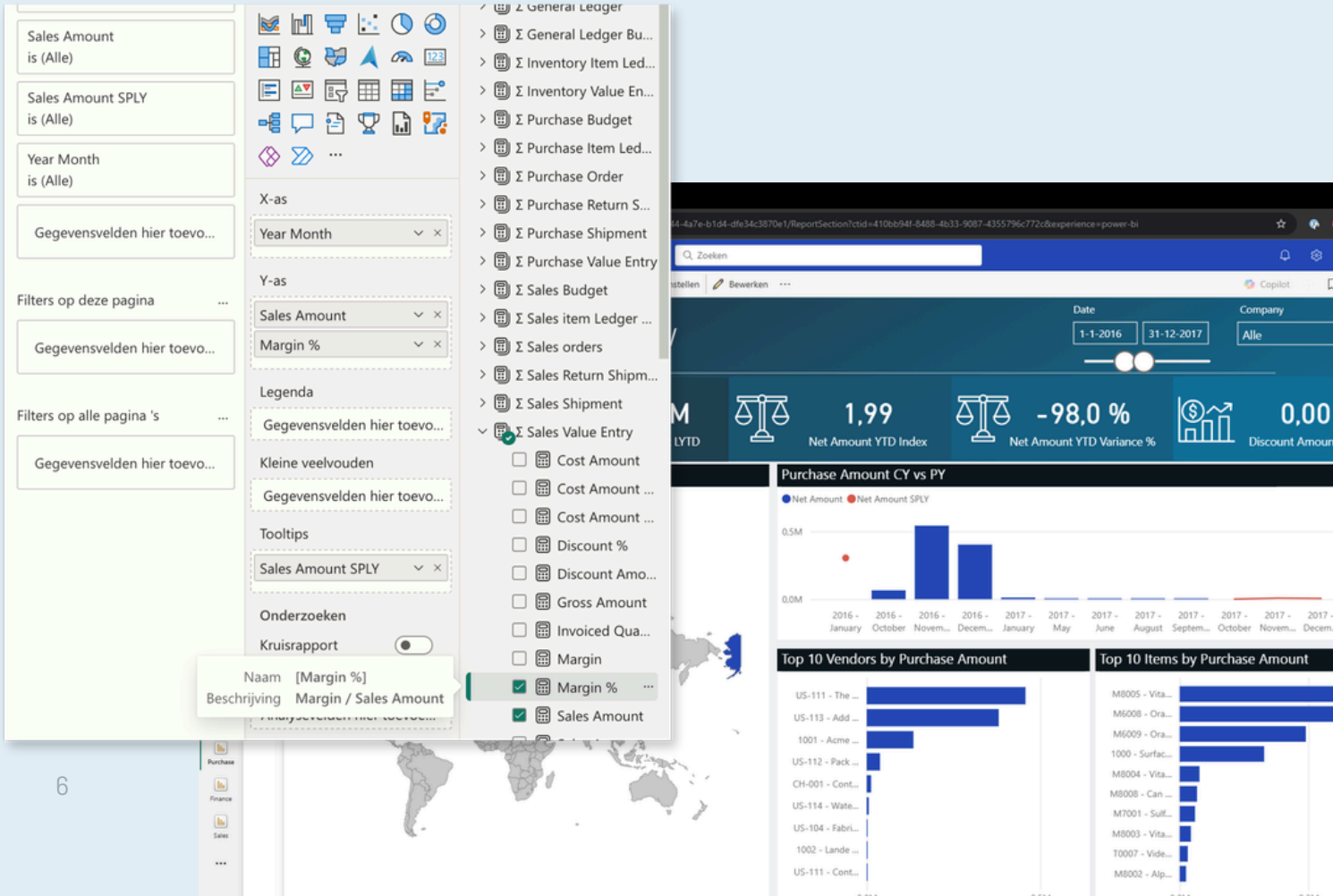
The engine behind all reporting capaibilities

The data model of 9A Smart Insights contains structured and modeled data from Dynamics and other sources. Through an intuitive interface in Power BI, users can easily combine facts and dimensions for their analyses.

The model provides insight into how reports are built and enables analyses based on complete and reliable data.

Comparisons between periods are easy to make, multiple currencies are intelligently supported thanks to a built-in conversion module, and in a multi-company setup, data from multiple Dynamics environments can be analyzed within a single Power BI environment.

Because the 9A Smart Insights data model is built on Microsoft Fabric, it offers even broader use – for example, enabling **AI applications** and advanced data analysis.



Content packs

Kick-start your Power BI and Fabric implementation

With 9A Smart Insights, you don't start with a blank canvas. The Content Packs for Dynamics ERP and CRM include out-of-the-box data, dashboards, and reports for a wide range of departments and business processes.

You can combine data from multiple sources within a single Power BI environment – even when that data comes from different Dynamics systems. The result is one integrated view of your organization.

- Finance
- Receivables
- Payables
- Purchase
- Sales
- Inventory
- Field Service
- CRM
- Warehouse
- Production
- Fixed Assets
- Members
- Plant
- Projects
- Service
- Leads
- Rental



Power BI dashboards

Inspiration for data visualization in Power BI

The standard Power BI dashboards and reports included with 9A Smart Insights offer inspiration for visualizing data across different departments.

Because our Content Packs unlock a large volume of information, we know from experience that organizations need examples to understand how this data can be used in different ways.

These dashboards serve as a starting point for exploring which data is relevant and how it can best be visualized within your organization.

Thanks to the comprehensive data model, you can easily combine and visualize information yourself using Power BI's drag-and-drop interface.





A trusted BI-partner

From implementation to BI adoption – your partner on the journey to data-driven success

The success of any BI initiative depends heavily on the right expertise and guidance. 9A Smart Insights is developed and implemented by a team of over 80 experienced BI specialists.

They combine deep knowledge of Microsoft Dynamics 365 with expertise across the broader Microsoft data ecosystem, including Power BI and Fabric.

What sets us apart is our end-to-end approach. We're not an external software vendor, but a partner who works alongside your team – from initial assessment and design to implementation, training, and continuous development. Our consultants tailor the solution to your organization's specific data needs and business processes.

A key part of our approach is the focus on adoption and knowledge transfer. We make sure your team is equipped to work independently with data analysis and reporting, so that self-service BI can truly take hold.

We understand that becoming a data-driven organization is a journey that requires ongoing support. That's why our involvement doesn't end after implementation.

Whether it's expanding the data model, integrating new data sources, or preparing for innovations like real-time analytics and AI – we provide the guidance and expertise to help your organization become structurally data-driven.



Contact

Let's talk about your data journey

Curious about what 9A Smart Insights and Microsoft Fabric could mean for your organization? We'd be happy to explore the possibilities with you.

Contact

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BI advisors



Stef helps organizations by exploring and clearly mapping out their needs, enabling them to derive data-driven insights from their data using Power BI.

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Gijsbert helps organizations by delving deep into the subject matter and translating complex data challenges into practical solutions that deliver immediate value from their available data.

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9A Smart Insights

With our quickstart BI solution, you:

- Accelerate your Microsoft Fabric and Power BI implementation
- Gain deep insights into Microsoft Dynamics data, both on-premises and cloud
- Enable self-service BI across your entire organization
- Build a solid foundation for AI and future data initiatives



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