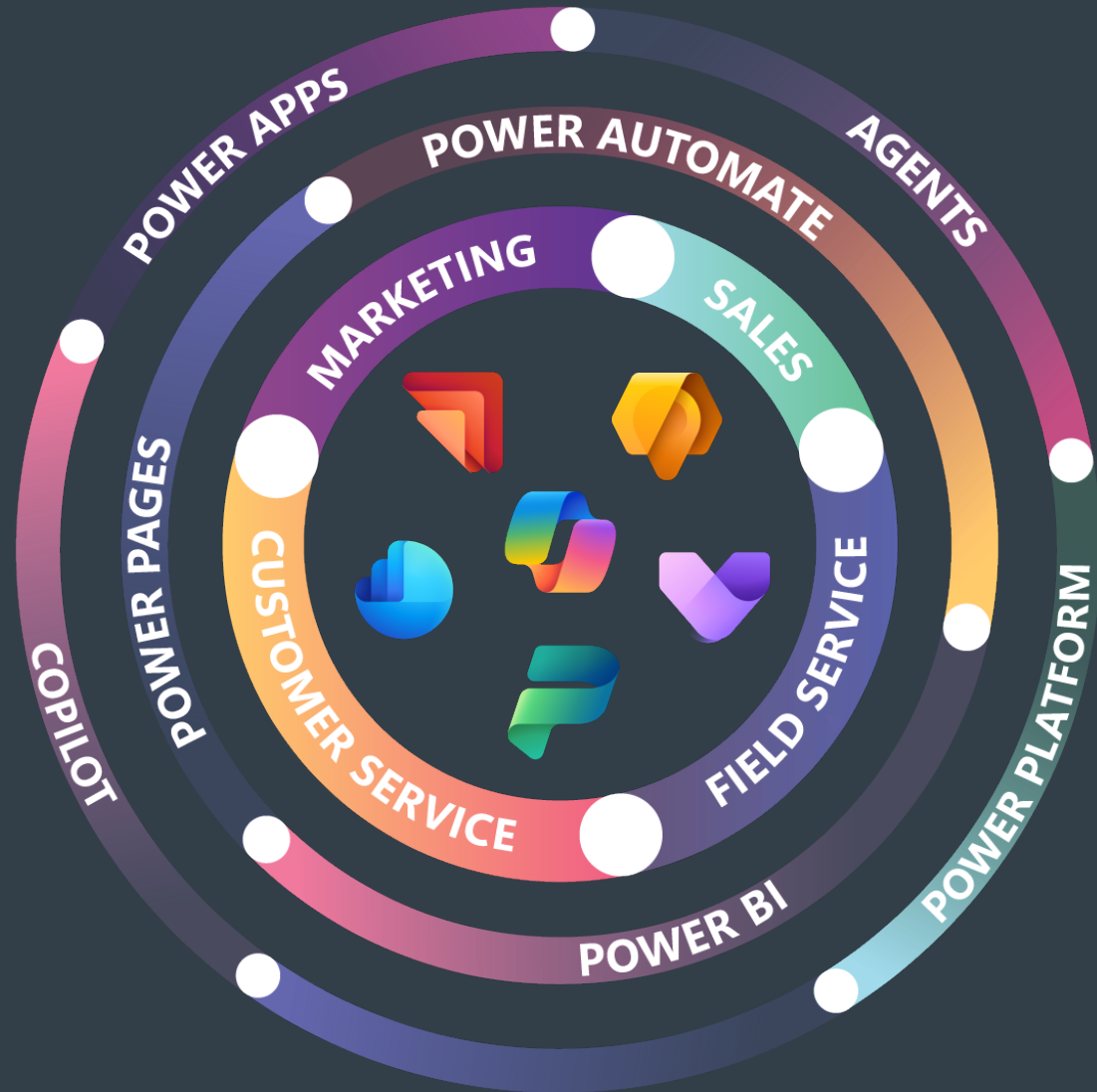


# CRM connect

From Power BI to Fabric



# Hands up, who is currently using Power BI?



# What Power BI Helps You Do Today

## Create Reports using simple visualisations

### Pull data from multiple sources

Connect to data from across your business (Dataverse, Business Central, Excel and more)

### Interactive reporting data e.g. drilldown/filters

Ability to (drill-down, filtering, real-time visibility)

### Modify data using measures and M code used by Power Query

No coding required

### Semantic Model (tables, fields, and relationships)

Build a single, trusted data model with clear relationships across your data

### Scale securely across your organisation

from individual users to enterprise-wide



# How Power BI Usage Typically Grows

## Semantic Models

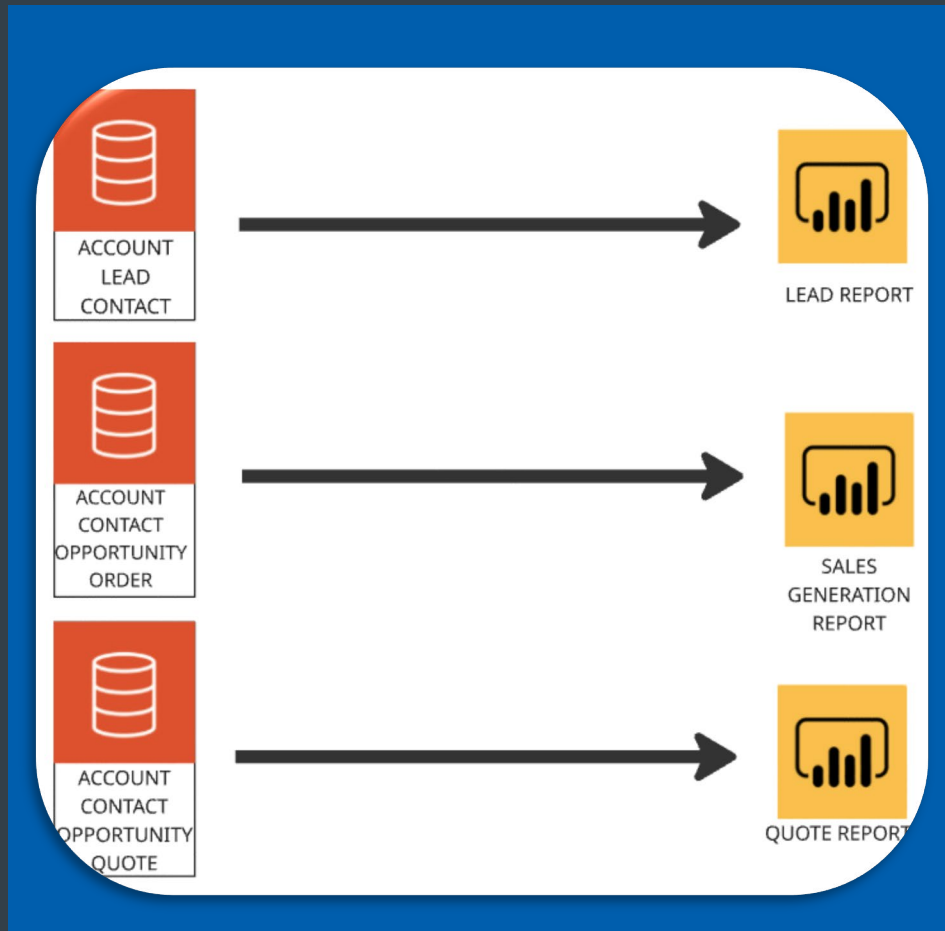
- Great for getting started in Power BI
- One model per report
- Duplicate data across reports
- Repeated refreshes of the same data
- Best for smaller teams (10 Users)
- Refreshes all data
- Power BI Pro licensing

## Dataflows

- Used when reporting starts to become more complex
- Data is prepared once and reused across reports (In Data Lake)
- Helps create more consistent, reliable data
- Multiple reports can use the same data model
- Best for growing teams (10+ Users)
- Incremental data refresh
- Requires Power BI Premium / Fabric

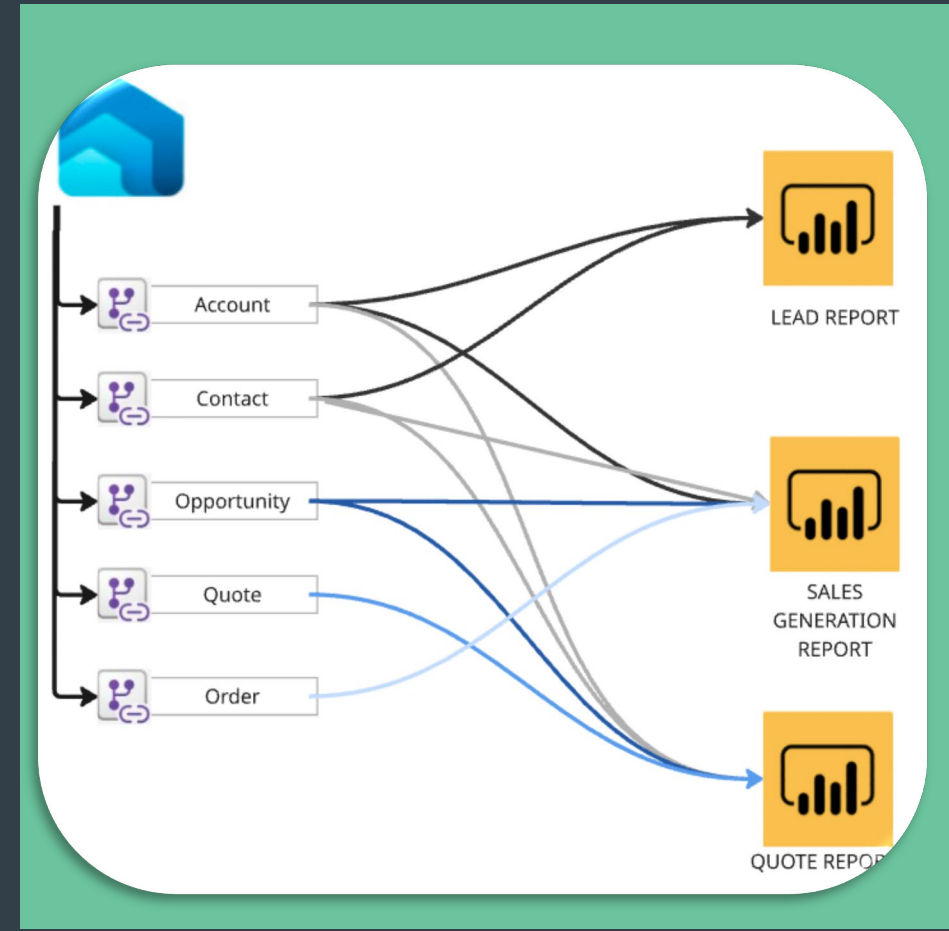
# From Isolated Reports to Shared Data

## Basic Semantic Models



*Separate Models per Report*

## Advanced Dataflows Model



*Shared Data Model*

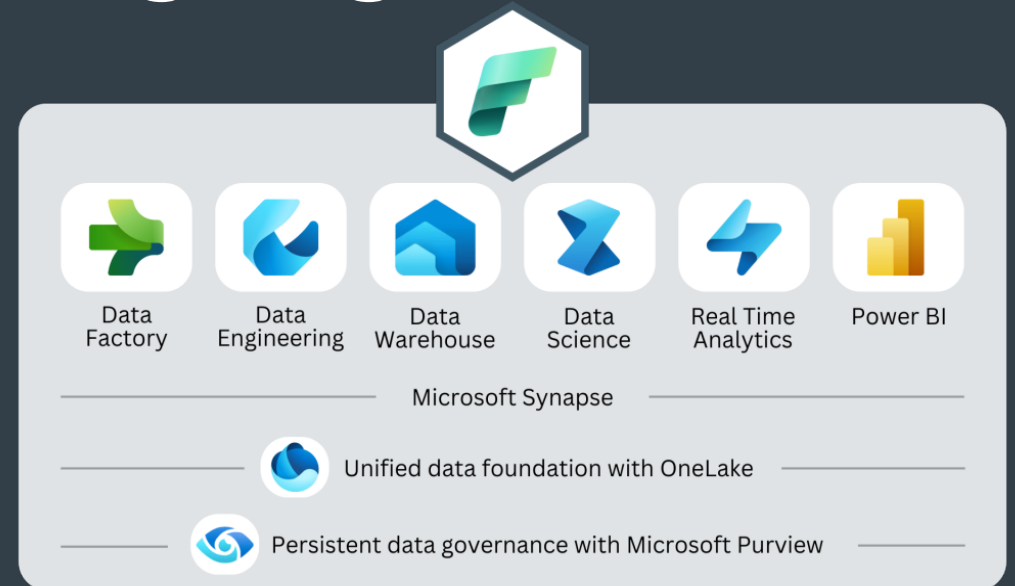


# Overview and Benefits of Fabric

# How Fabric Brings Everything Together

Fabric is designed for Enterprise but can be used by SMB on a cases by case basis.

- Data Factory = Connects to different data sources/Moves and integrates data/Automates data pipelines
- Data Engineering = Prepares and processes large volumes of data/Works with raw data at scale/Enables data transformation and optimisation
- Data Warehouse = Stores structured, business-ready data/Designed for fast reporting and queries/Central source for trusted data
- Data Science = Builds predictive models and insights/Uses machine learning on data/Helps forecast trends and outcomes
- Real-Time Analytics = Analyses live, streaming data/Provides instant insights as events happen/Ideal for IoT, operations, and monitoring
- Power BI = Creates reports and dashboards/Visualises data for business users/Enables interactive decision-making



*"Rather than separate tools, Fabric brings everything together in one platform — from getting your data in, preparing it, storing it, analysing it, all the way through to reporting in Power BI."*

# How Fabric works and why is it good for you?

## **Fabric is Scalable Reporting Solution**

### **Dataflows**

Automates data preparation and refreshes

**Warehouse (Single Source)** – For Data Analysts/Power BI Devs/Reporting

**Lake Houses (Multi-Source)** – For Data Engineers/Machine Learning/LLM's

**SQL Endpoints (Data Filtered before it hits Power BI)**

Enables fast and flexible querying

**Familiar Power BI Interface** Same familiar Power BI interface your team already knows

### **Centralised Capacity (Storage) Management**

Central control over performance and resources.

**Consistent Data (pre-formatted)** Data is prepared and consistent before reporting

### **Referenced Data (only query required data)**

Queries only the data needed – faster and more efficient

# Why Fabric Goes Beyond Standard CRM Reporting

- Report on Customer Insights Data (Only supported in Fabric)
- More Freedom to Embed reports within other business applications (Included in F64 Licence) – (own website/Power Portals)
- 48 x Incremental refreshes Per Day (Max)
- Use Native Copilot to build reports



# Where Copilot Fits in Fabric

Fabric Process	Description	Fabric Level
Transformation	Generates steps and mapping logic	Data Engineering / Data Factory layer
Modelling	Recommends measures, Generates DAX calculations, Explains DAX (Also supported in Premium)	Semantic Model / Power BI layer
Reporting	Generates visuals and Page summaries	Power BI layer
Analytics	Troubleshoots and Identifies Patterns	Advanced analytics / insights layer



*"One thing to be aware of — Copilot isn't just switched on everywhere. It does depend on the Fabric level and licensing you're on, and also which part of Fabric you're using."*



# Fabric Demonstration

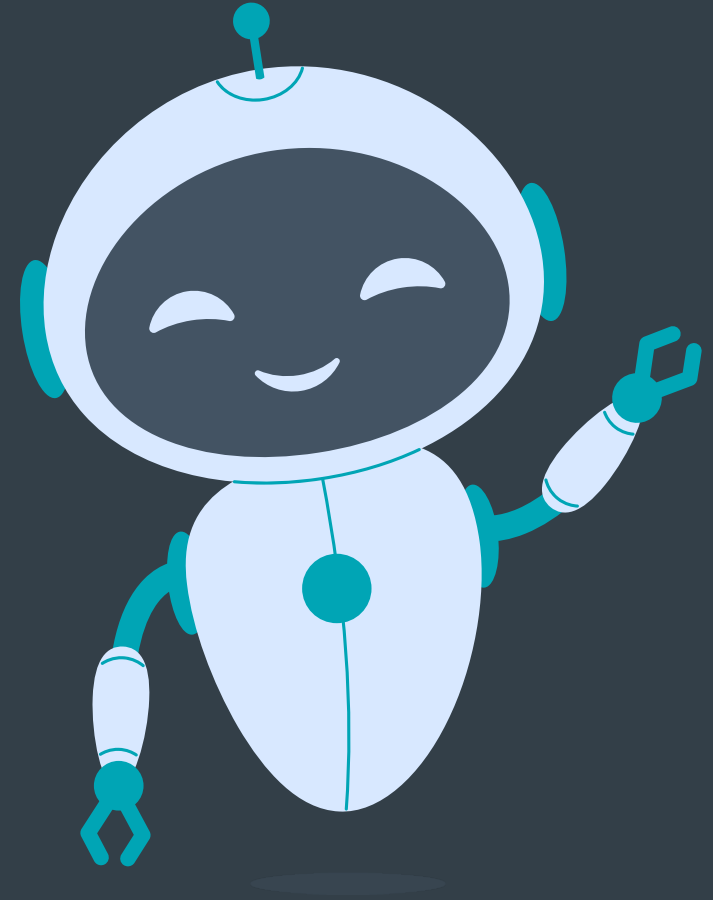
*Supporting Videos*

Viewing Fabric

[https://youtu.be/s5IUYe\\_noNk](https://youtu.be/s5IUYe_noNk)

# Demonstration

1. What does Fabric look like?
2. Connecting to a table in Power BI via a SQL Endpoint
3. Generating DAX with Copilot
4. Generating a Page and Visualisations with Copilot



# What does it cost?

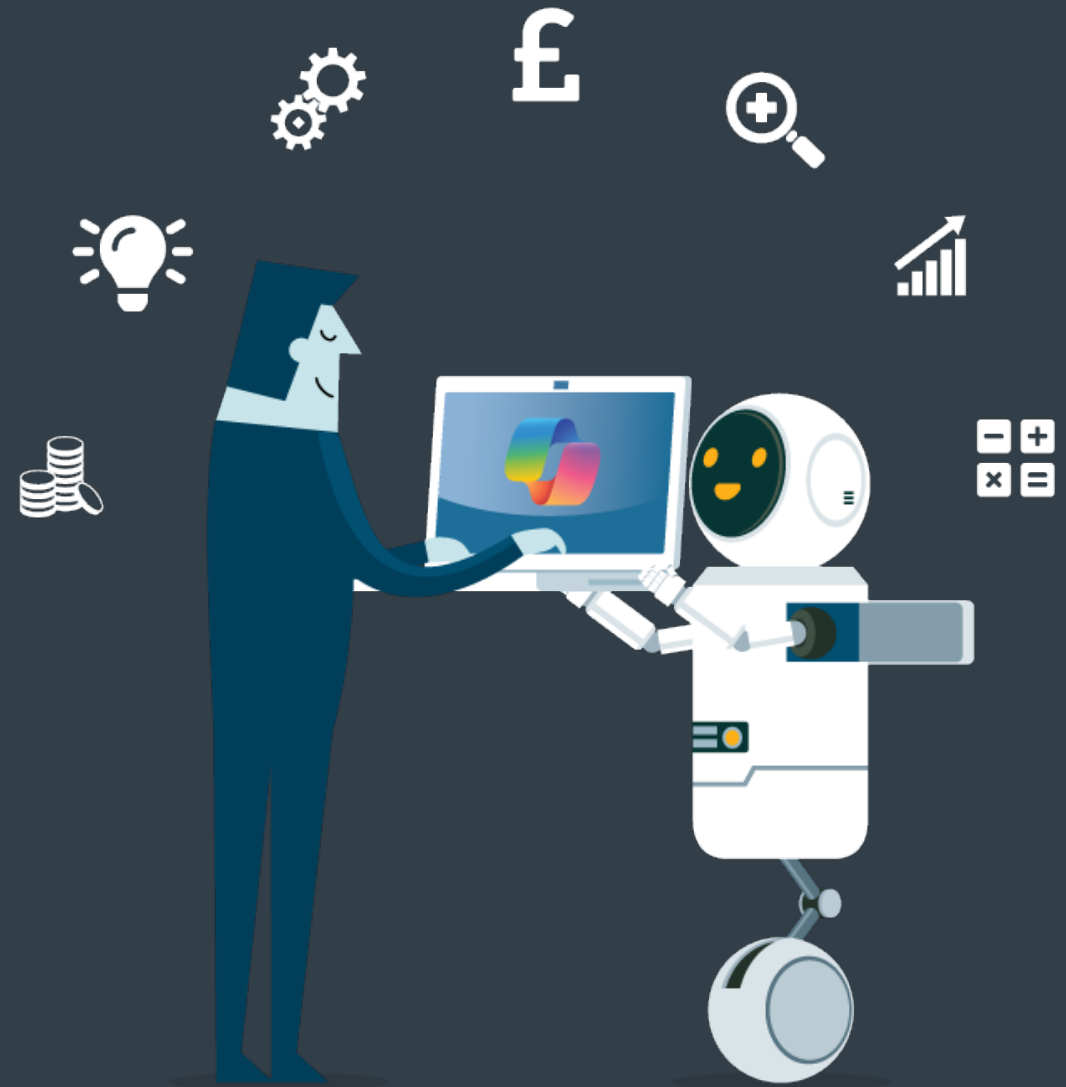
## Power BI

- **Power BI Pro:** £10.80 per user / month  
Required for report authors and sharing in Pro-only workspaces.
- **Power BI Premium Per User:** £18.50 per user / month  
Adds advanced features and Power BI Copilot but still licensed per person.

## Microsoft Fabric

Fabric is **not per user** – you pay for compute capacity.

- **Fabric F2:** £210 per month  
Entry-level Fabric capacity for small teams & light workloads).  
BI Pro licences still required per user.
- **Fabric F64:** £6,750 per month  
Enterprise scale (equivalent to current Power BI Premium).  
Enables free report viewers and full Fabric Copilot workloads.



# Licence Comparison



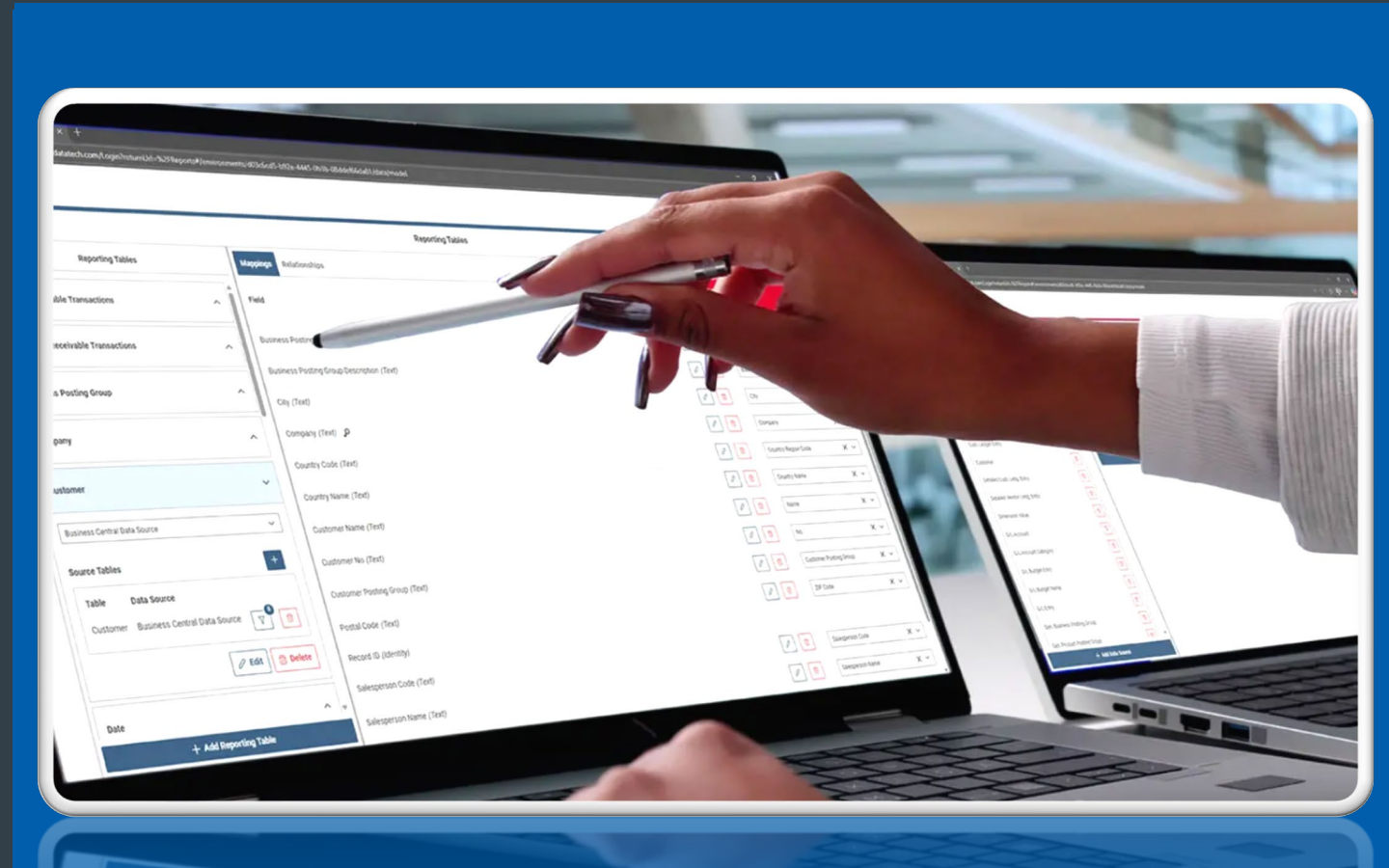
Licence Tier	Capacity	Max model size	Storage	Refresh limit	Viewer licence needed	Embedding type
Power BI Pro	Shared	1 GB	10 GB / user	8 x day max	All viewers need Pro	User owned data
Power BI Premium	Shared (PPU)	Up to 100 GB	100 TB (Per Organisation)	48 x day max	All viewers need Premium Per User	User owned data
Fabric F2	2 Compute Units (Small)	3GB	2TB (Expandable)	48 x day max	All viewers need BI Pro or Premium	User owned data only (embedding)
Fabric F64	64 Compute Units (Large)	Large models (100 GB+)	64TB (Expandable)	48 x day max	Free viewers allowed	User owned + App owned data

# An Alternative

COSMOS

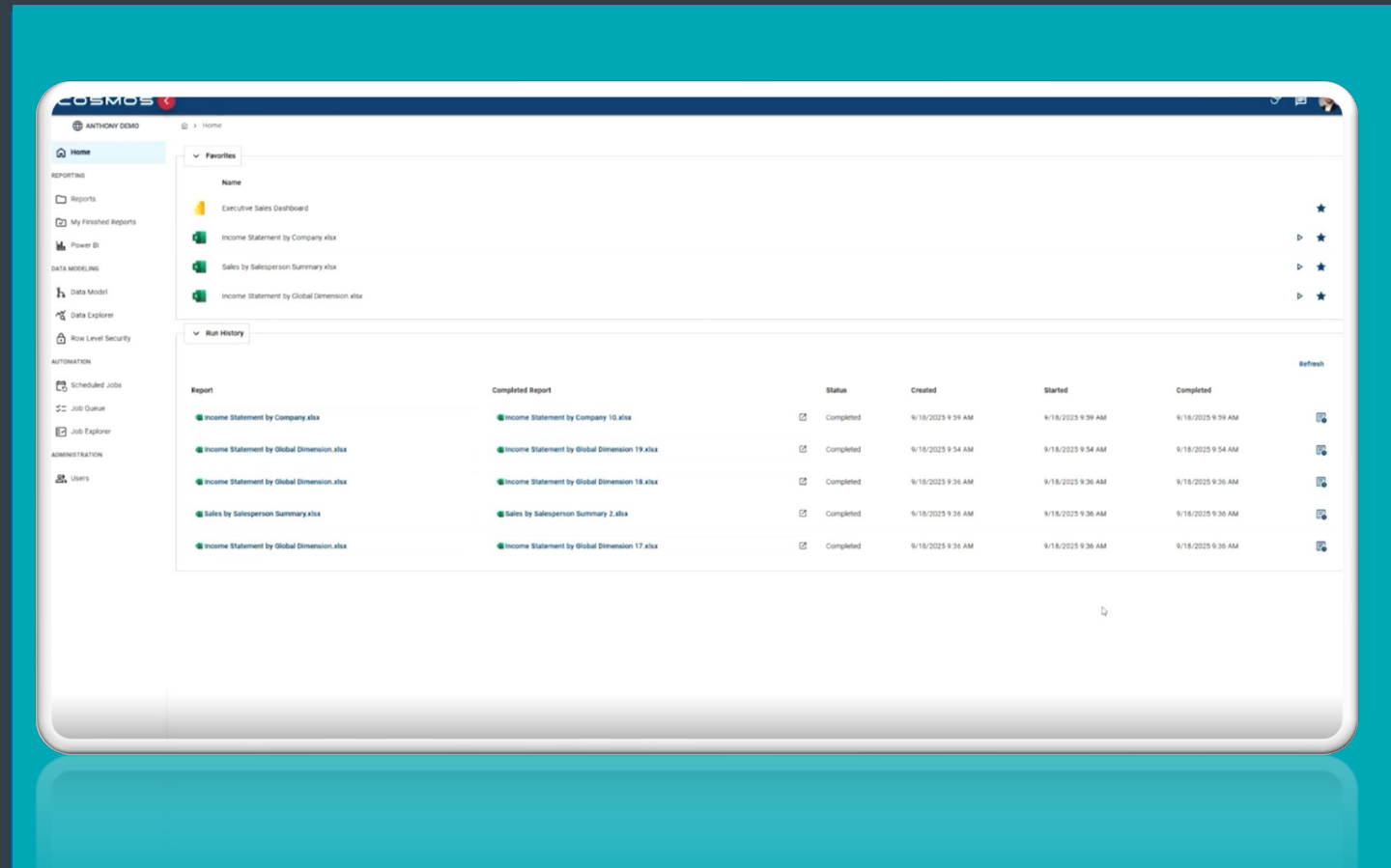
# An alternative to transform and store data

- Business Central Connector as standard, have expanded to have a Dataverse connector
- Fabric is stored in customers own tenant, Cosmos is stored in Cosmos' Tenant.
- Both allow for Data Transformation.

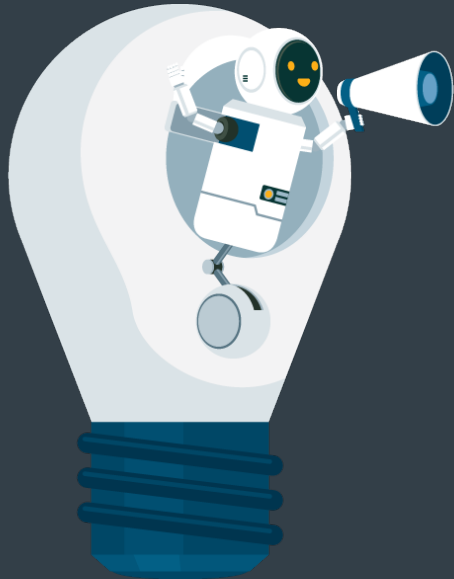


# How can it Help?

- Offloads query capacity from source database.
- Simpler User Interface allows to manage data independently
- Pre-packaged Reports – so quicker to get up and running



# Take Aways – is AI going to build my report



## **AI can:**

- Generate reports and visuals from your data
- Suggest insights and highlight trends
- Create measures and calculations
- Speed up report building significantly

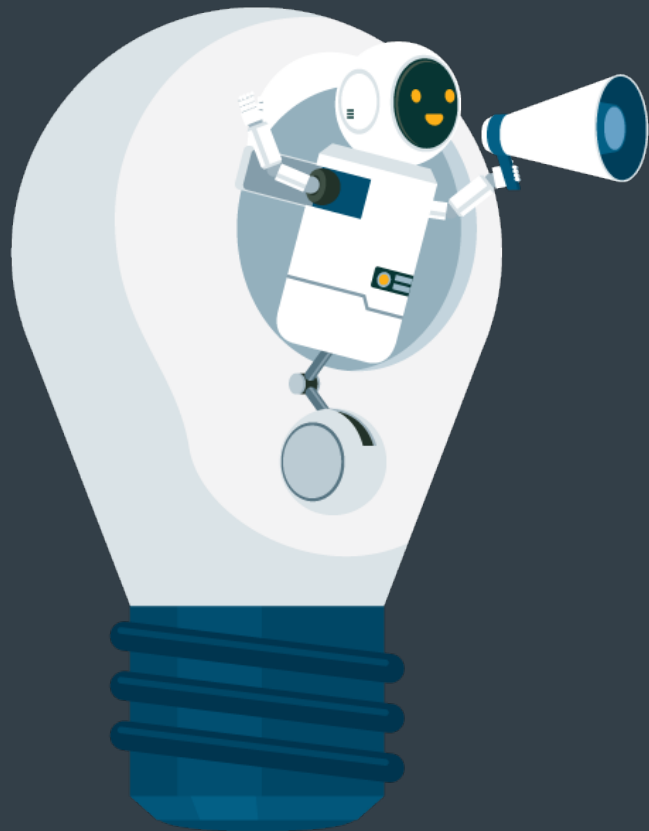
## **AI can't:**

- Replace good data or poor data modelling designs
- Understand every business scenario

*The real value isn't AI replacing people — it's AI accelerating what good people can do.*

*Takeaway – Use AI to accelerate, not replace  
Combine human knowledge with AI power*

# Take Aways



If you are interested in exploring Fabric and feel you have a heavy use of Power BI or use Customer Insights, come speak to us. We can offer guidance if it is right for you.

Cosmos are here today so please reach out to them

If you have Power BI/Fabric questions, make sure you speak to your Account Manager to get time with us.

# Any Questions?

## *Supporting Power BI Videos*

Viewing Fabric in Power BI

<https://youtu.be/ozuOBIf558E>

Using Copilot within Power BI

<https://youtu.be/mse5xjlwiA8>

Thank you!



*CRM 2026 App*



CRM

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PLATFORM