A DYNAMICSCON PRESENTATION

POWERED BY DUG

DYNAMICSCON VIRTUAL

MARCH 2023

CUSTOMER ENGAGEMENT

DYNAMICSCON.COM

50 Tips in 50 Minutes

Kylie Kiser
Solution Architect
RSM

Heidi Neuhauser
Partner
Reenhanced

Tip #1

Follow Solution Management Best Practices

- Use solution files to package your changes and updates.
- Use at least 2 environments (Sandbox & Production).
- Set up a prefix/publisher for your changes.
- In your solution file, don't include all components / metadata for tables, unless you need them.
- Come up with a naming convention for workflows, flows, business rules, etc.
- Have your users test & verify all changes.

Tip #2

Configuration Table

- Create Configuration Table to hold data needed by Power Automate
- Put anything here that might change so it can be easily updated without modifying the automation

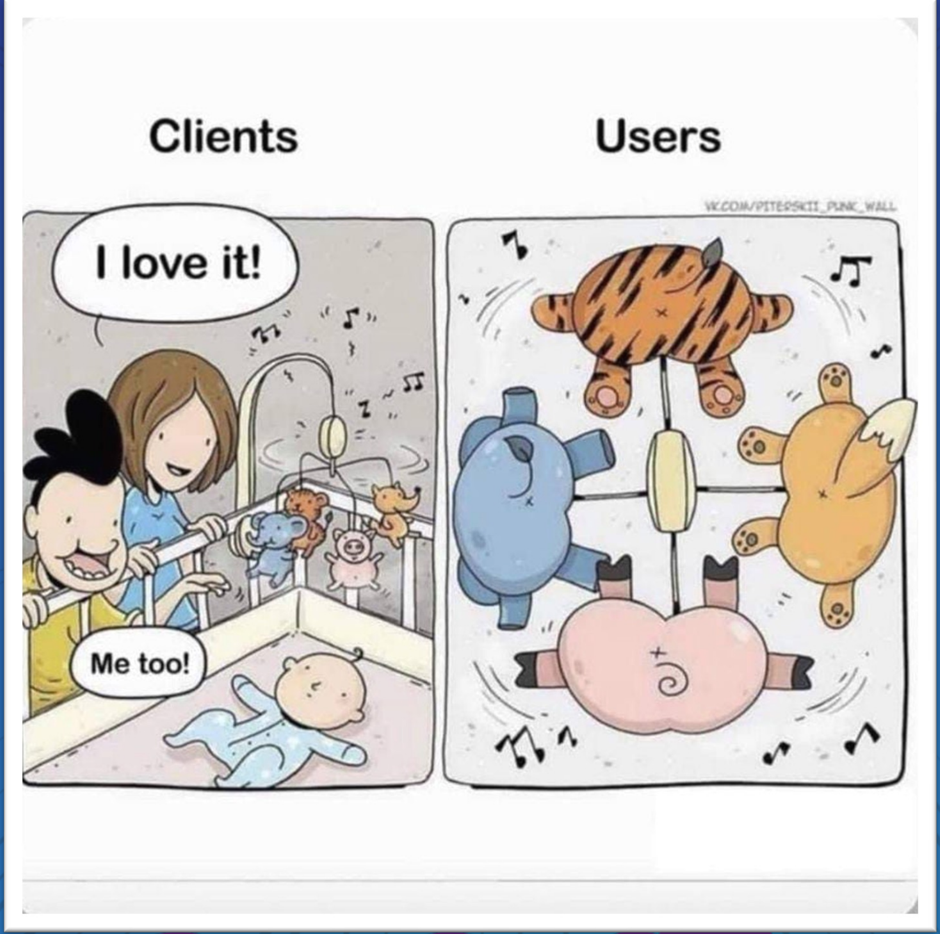
Tip #3

Form a Group of End Users

- ✓ **Create a team of End Users**
  - Super CRMers
  - Power App Ninjas
  - Champions
  - Early Adopters
  - Advocates
- ✓ **Include varied skill levels**
- ✓ **Involve this group right from the start**

Tip #4

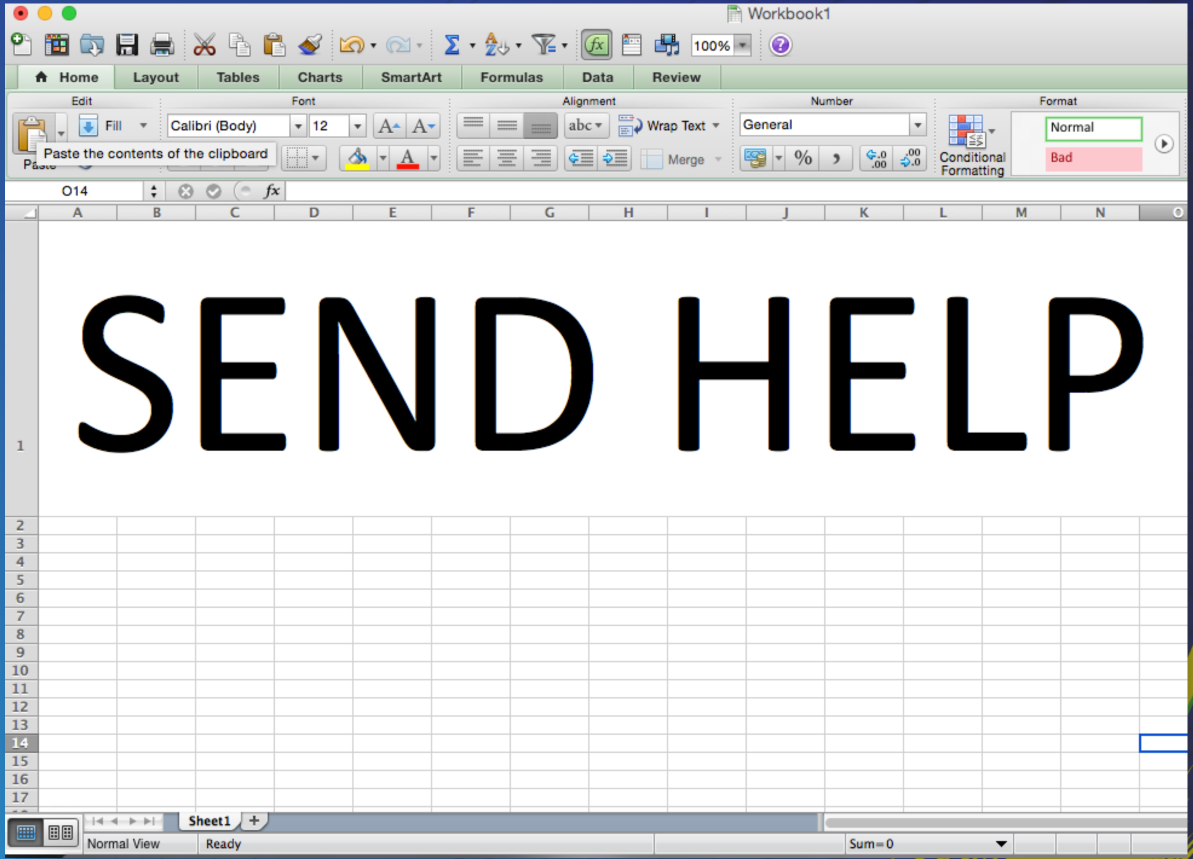
Include End Users in Requirements Phase



Tip #5

Find the user's pain!

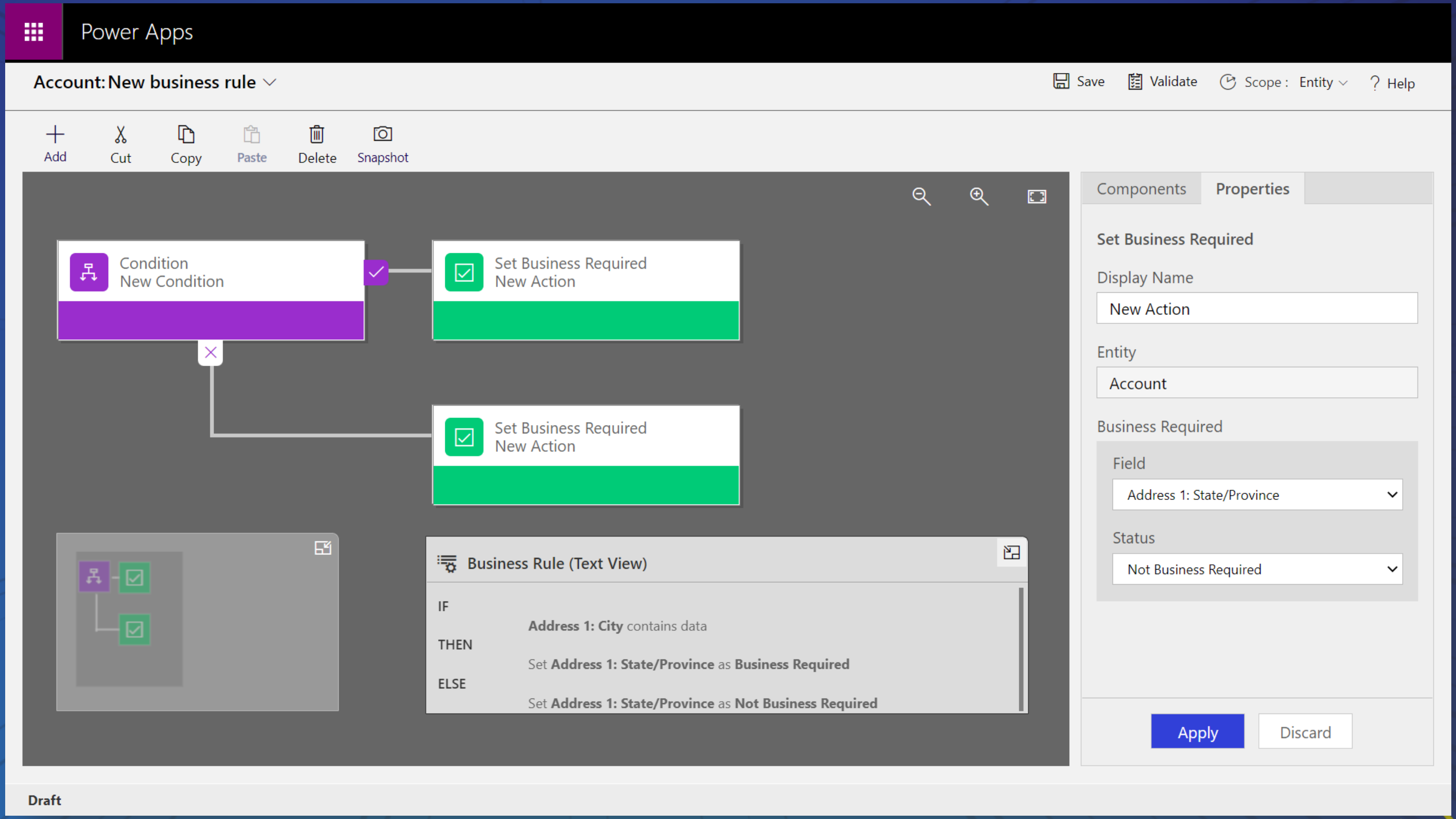
- **Why aren't they using it?**
- **Your challenge: Find that pain!!**
    - Job shadow (Customer Service Reps, Inside Sales Reps)
    - Ride along (Salespeople)
    - *Hint*: Look for manual Excel reporting they are providing to their manager!
- **Automate the pain**
    - Use the technology in D365 & Power Platform to solve their issue!



Tip #6

Minimize required fields on a form

- **Business Rules**



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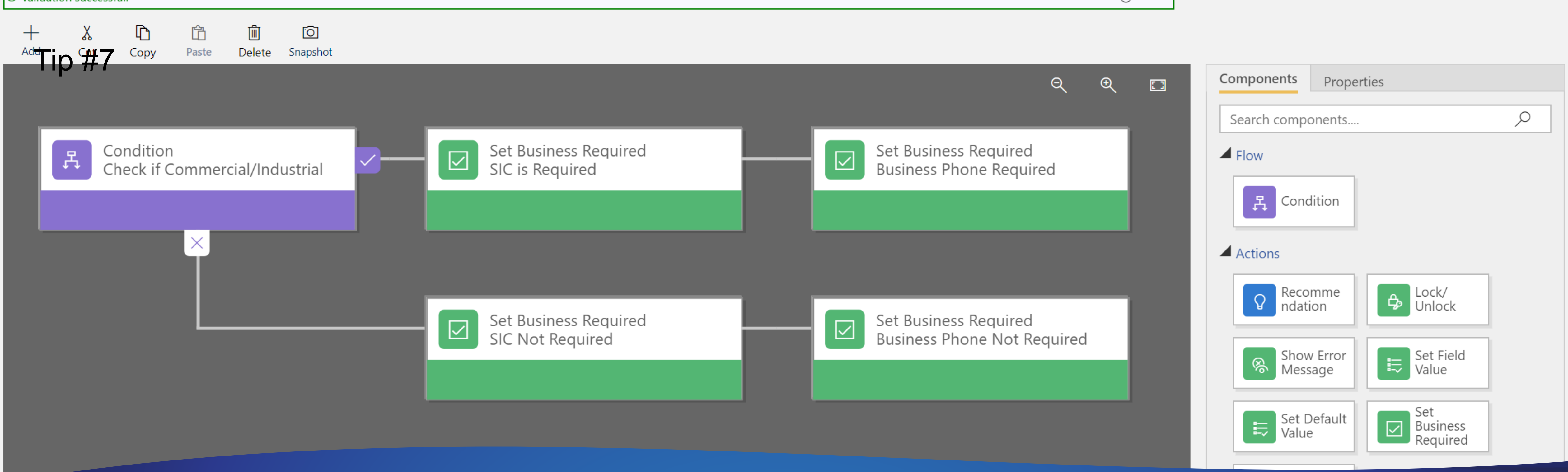
Tip #7



Business Rules: Set Required

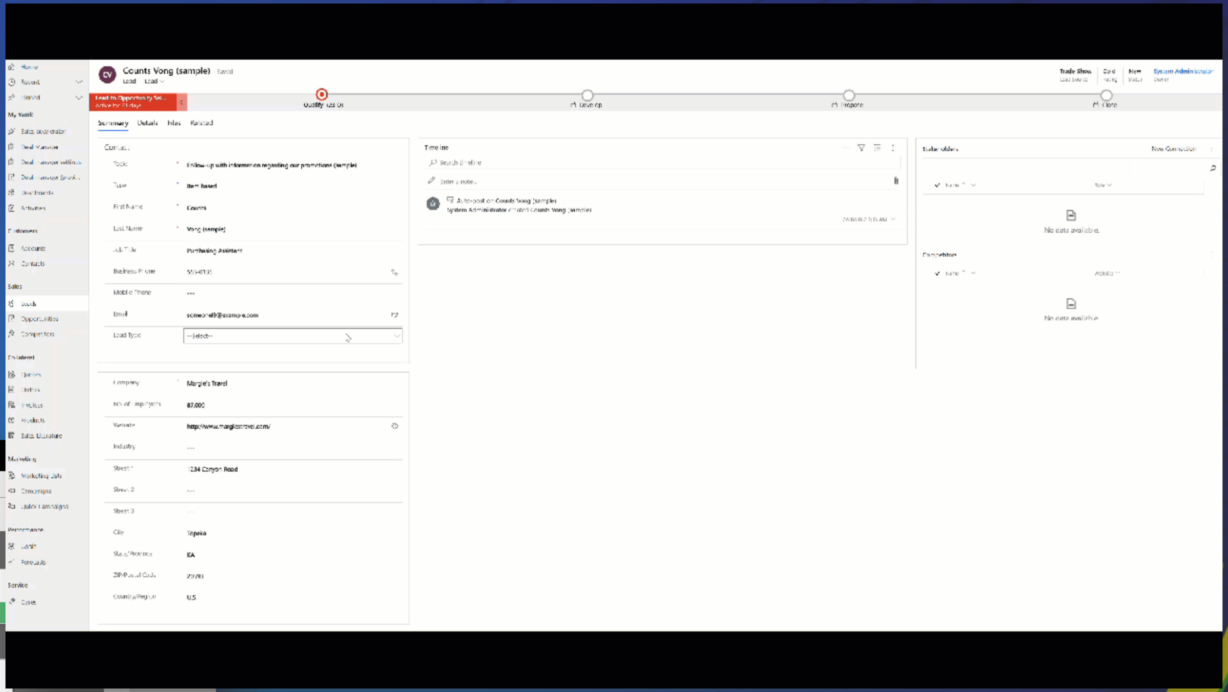
- **Use case:**
  - If a Lead is Commercial, set SIC Code and Business Phone to required.
  - If a Lead is Residential, SIC Code and Business Phone are not needed.

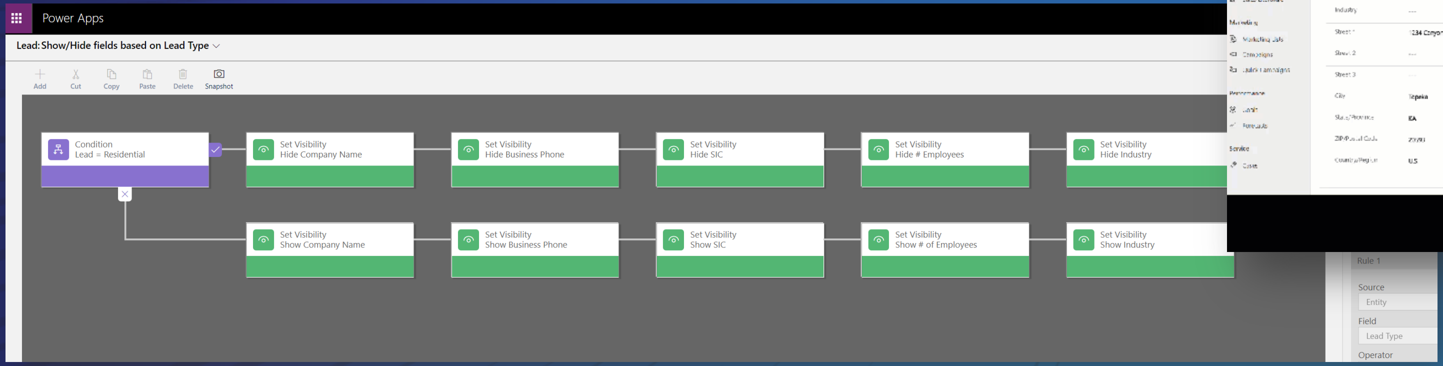
Tip #8

Business Rule : Set Visibility

Example:

If a Lead is Residential, hide SIC Code, Industry, No. of Employees, Company Name and Business Phone fields.



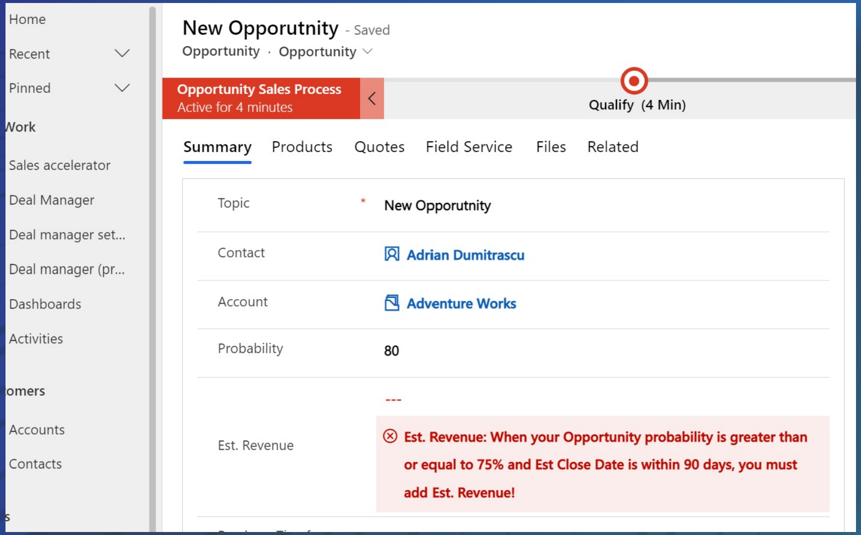


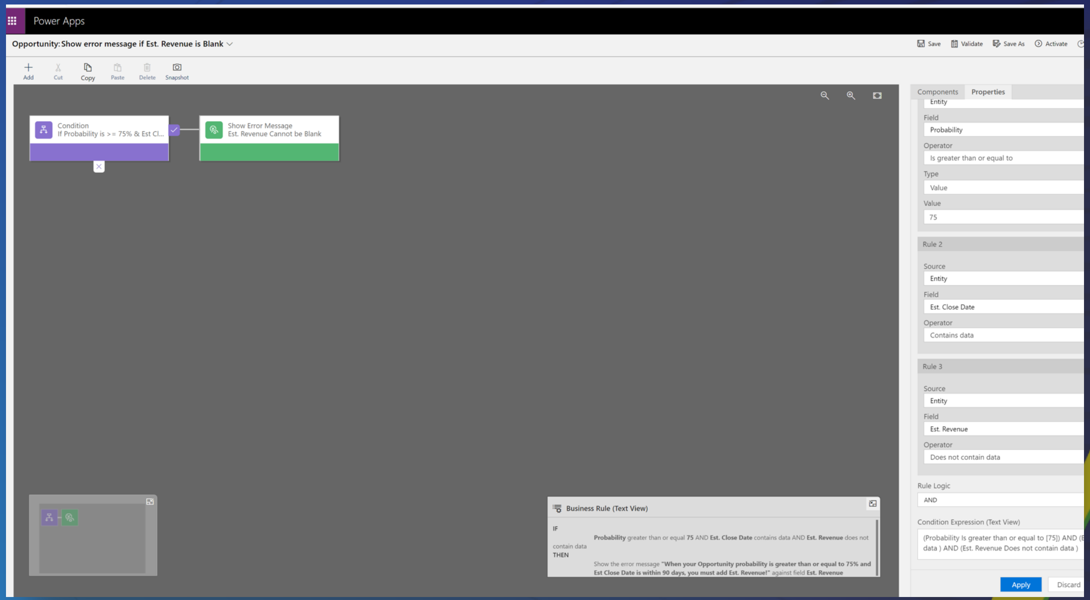
Tip #9

Business Rule: Show Error Message

Example:

If Opportunity Probability is greater than or equal to 75%, Est Close Date has a value, but Est Revenue is blank, show an error message.

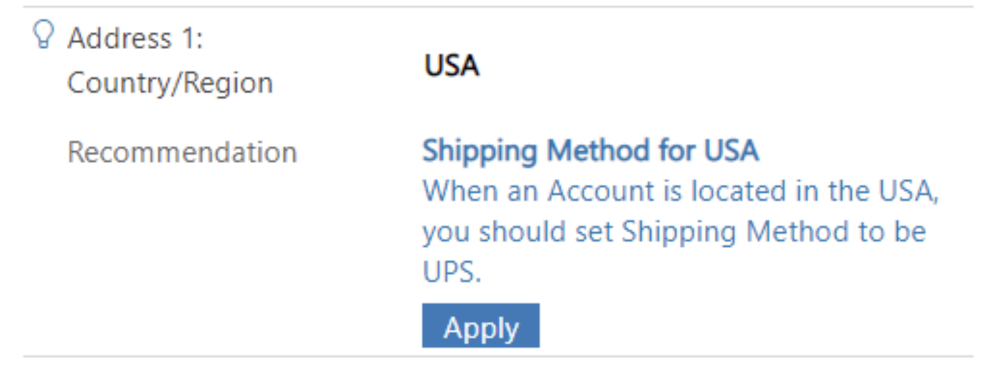


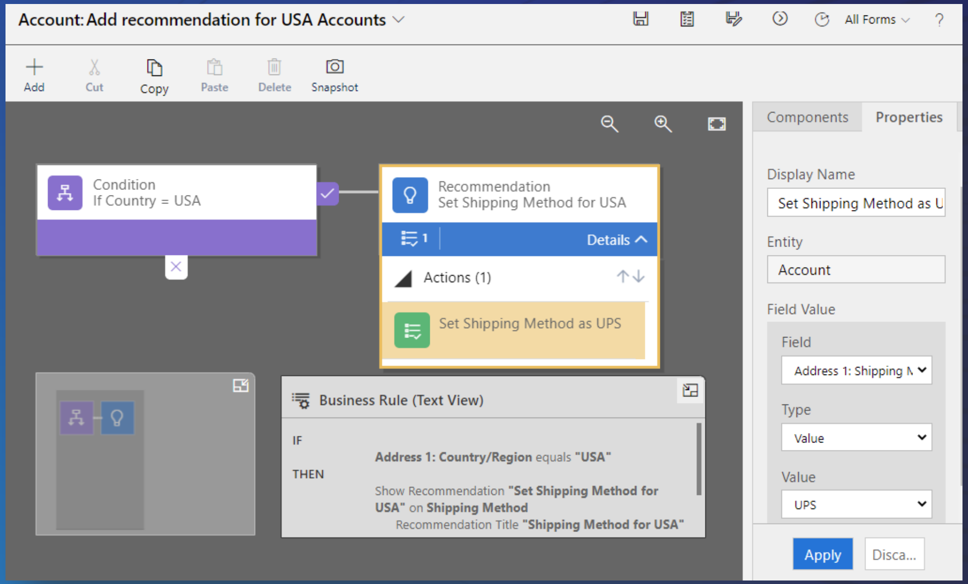


Tip #10

Business Rule: Add Recommendation

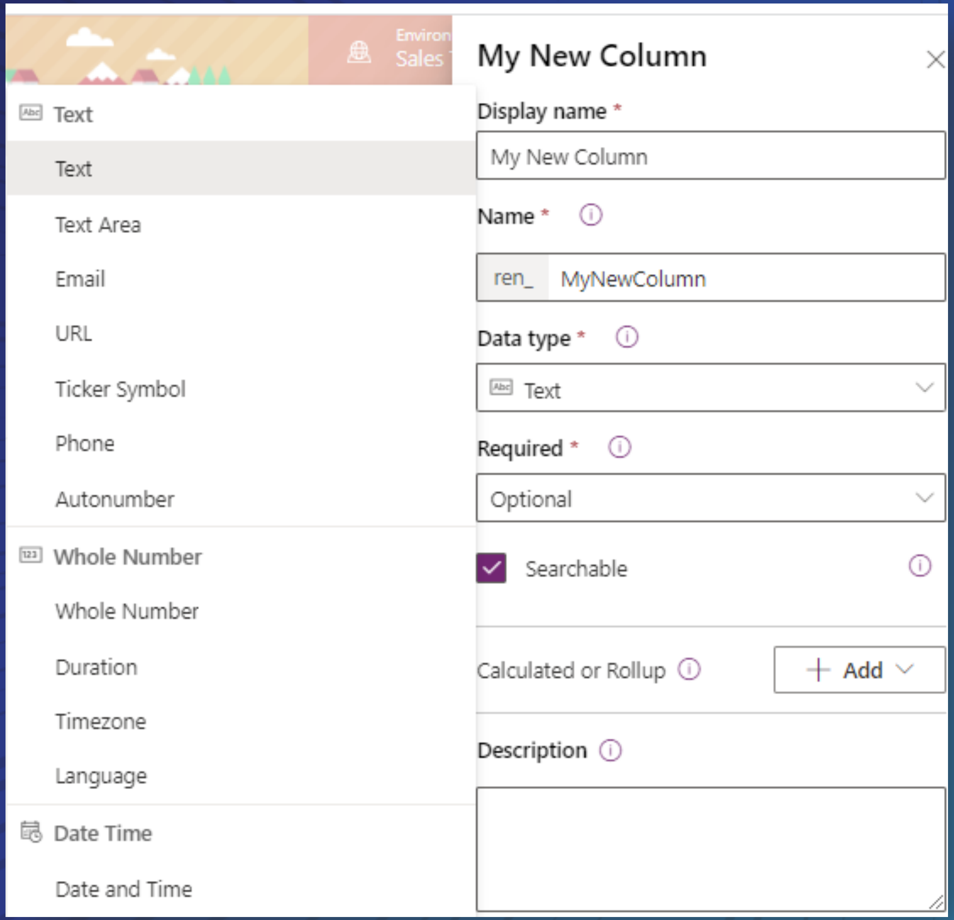
If Account Country = USA, add recommendation to set shipping method as UPS.





Tip #11

Pick the right column (field) type

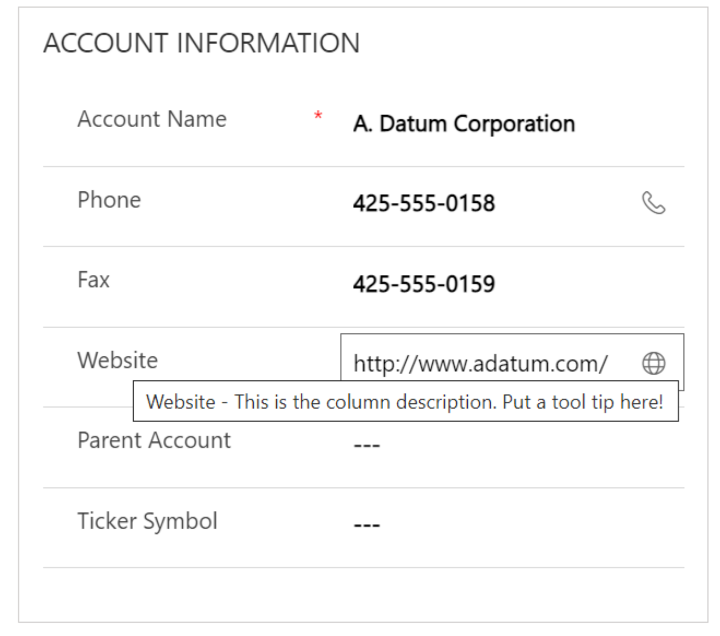


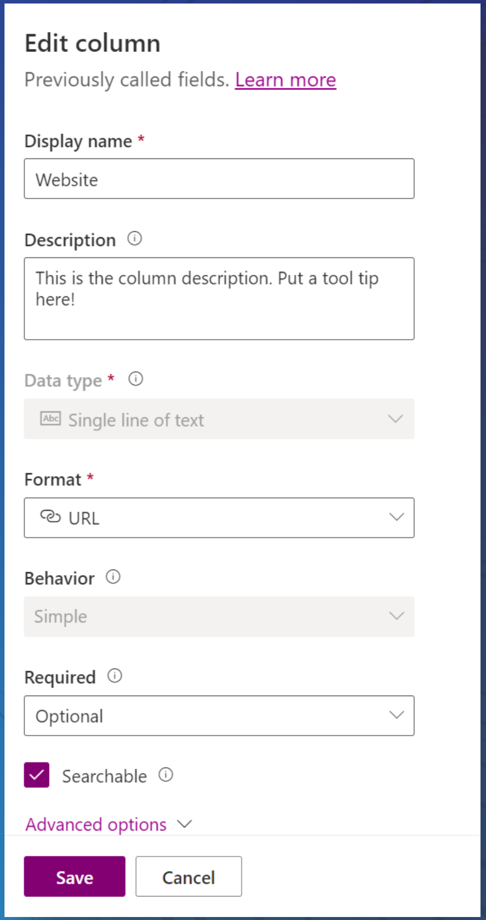
- **Many types**
  - Text
  - Whole Number
  - Date & Time
  - Choice *(option set)*
  - Choices *(multi-select option set)*
  - Currency
  - Customer lookup
  - & Many more!
- **Cannot change type after saving!**

Tip #12

Use tooltips on columns (fields)

- Populate the Column Description
- Shows as Tool Tip on the form





Tip #13

Use Calculated Fields

- **Automate manual calculations**
  - Example: Full Name = First Name + Last Name
  - Example: Net Worth = Assets – Liabilities on an Account
- **Column types that support calculations:**
  - Text
  - Choice
  - Yes/No
  - Whole Number
  - Decimal Number
  - Currency
  - Date Time
- **BEST PRACTICE TIP! Make your calculated fields READ ONLY.**

An Example:

Scenario:
If an Opportunity is rated 4 or 5 stars, AND estimated revenue is >= $5,000, we want to set an activity due date in 7 days. Otherwise, activity due is in 1 month.

CALCULATED FIELD

Set Activity Due

IF...THEN

CONDITION (OPTIONAL)

If **(Current Entity) Rating** is greater than or equal to **4**

and **(Current Entity) Est. Revenue** is greater than or equal to **5000**

+ Add condition

ACTION

Set **Activity Due** to **AddDays(7, Created On)**

ELSE

CONDITION (OPTIONAL)

+ Add condition

ACTION

Set **Activity Due** to **AddMonths(1, Created On)**

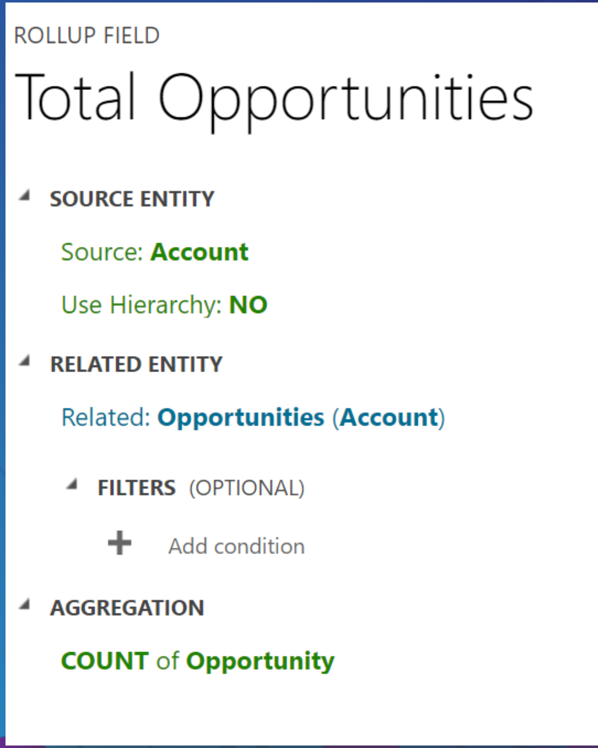
Tip #14

Use Rollup Fields

- **Aggregate values calculated over related records.** ***Similar to using sum, min, max and count in Excel.***
  - Example: Rollup of all open Opportunities on an Account.
  - Example: Total of all open Cases linked to an Account.
- **Aggregate using the following functions:**
  - Sum
  - Count
  - Min
  - Max
  - Avg
- **You can use a calculated column in your rollup.**
- **Calculations run asynchronously in the background by scheduled system jobs.**
- **They can also be manually updated on the form.**

An Example:

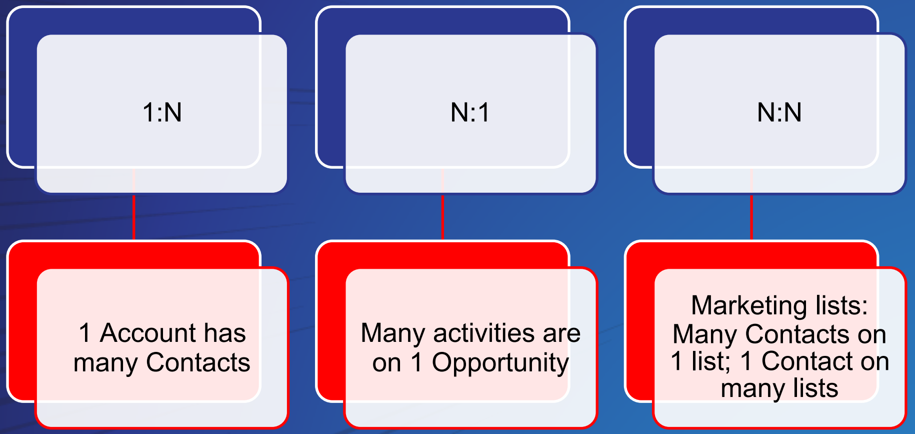
Scenario: The count of All Opportunities should be listed on the Account form.



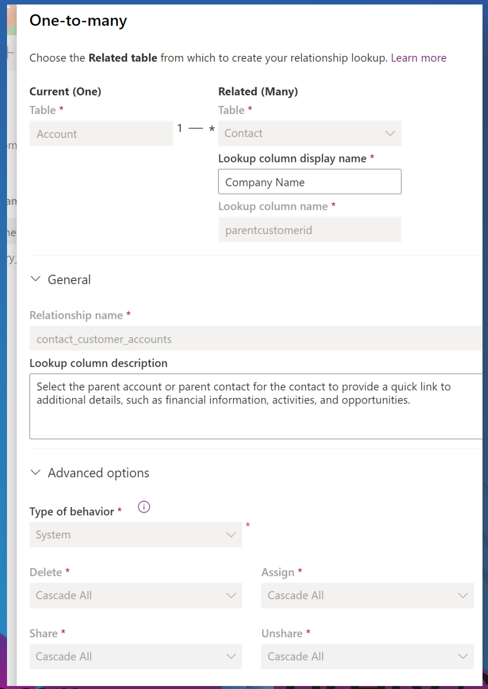
Tip #15

Table Relationships Matter!

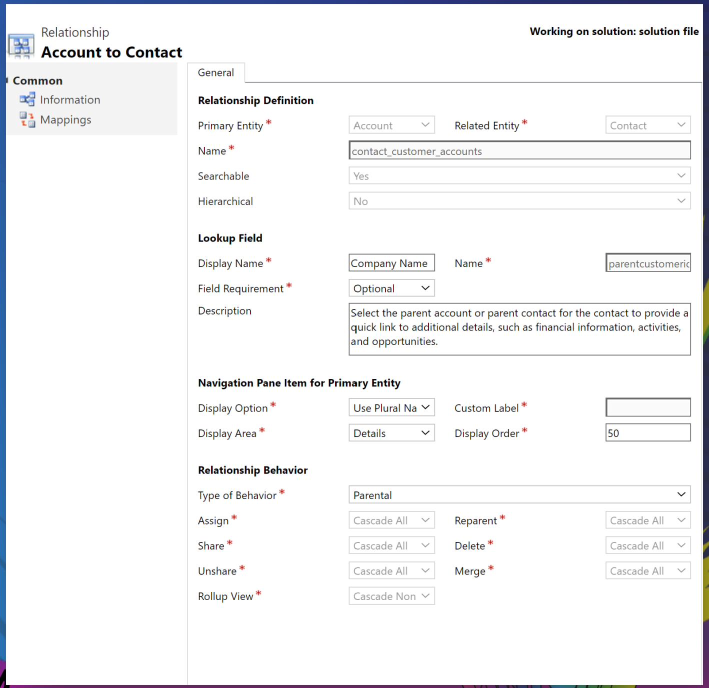
- **Maker Portal has limited functionality – Switch to Classic for more capabilities**
  - Update relationship behavior / cascade settings
  - Mappings
  - Change requirement levels



Power Apps:



Classic:



Tip #16

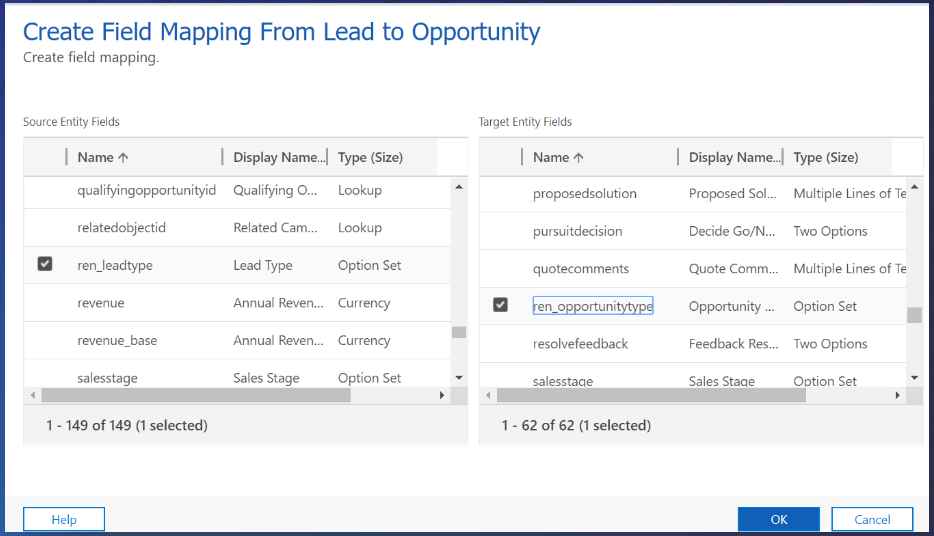
Custom Many to Many Relationships

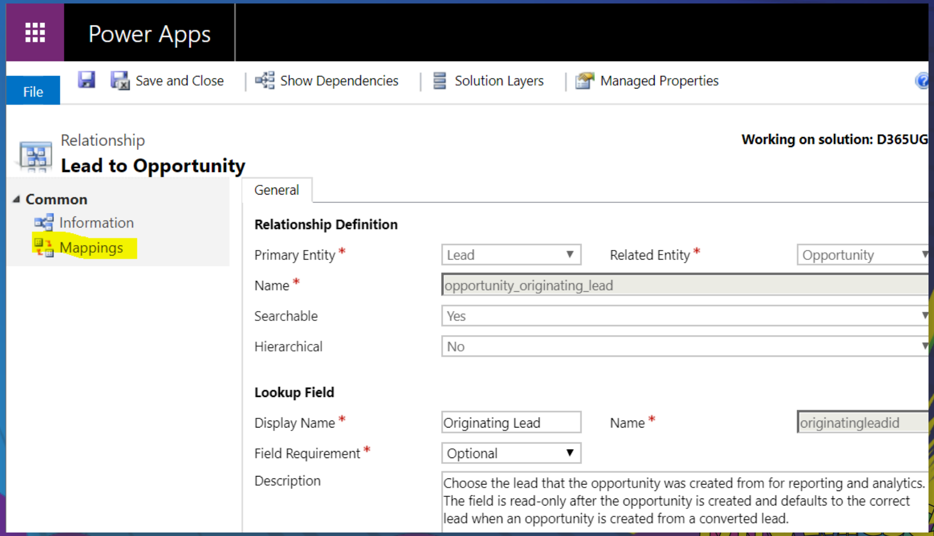
- Use OOB Many to Many Relationships or you can create an intersect table to hold details about this relationship
- Keep date relationship was added, status, etc.

Tip #17

Customize your 1:N / N:1 Field Mapping

- Map field values from one table to another
- Example: Lead to Opportunity



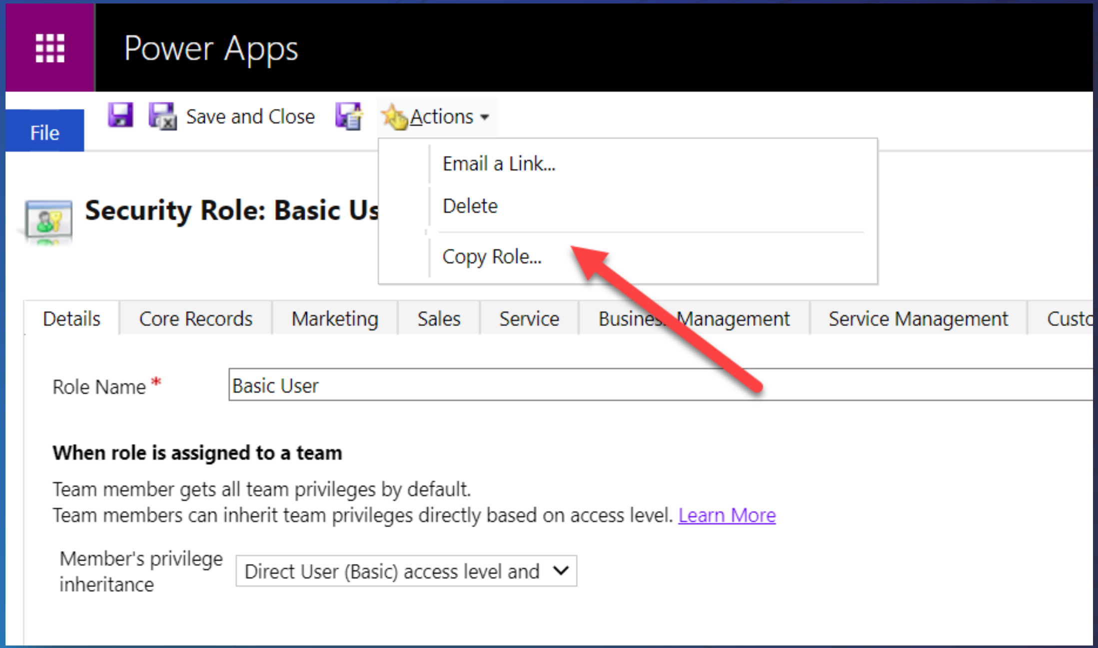


Switch to Classic!!!

Tip #18

Don't Use Out-of-the-box Security Roles

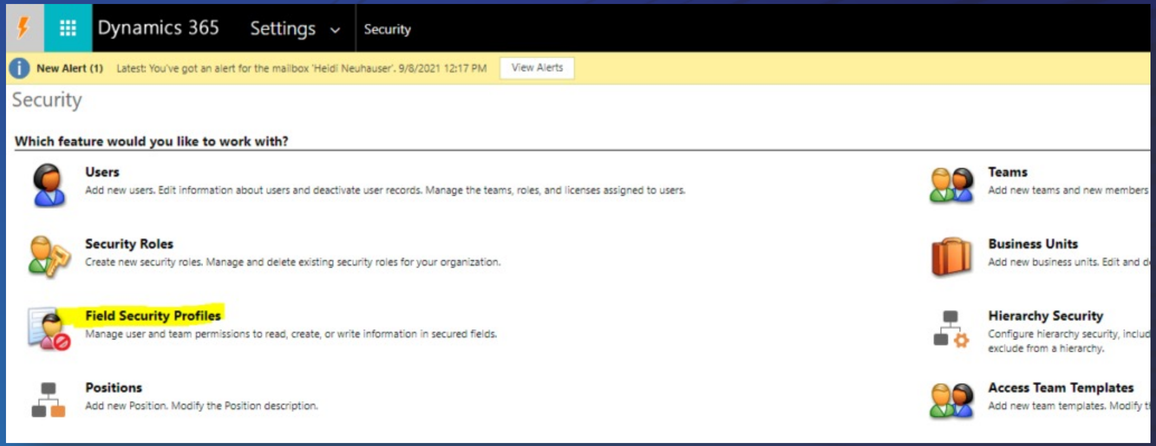
- Copy Role and rename!
- Avoid unwanted changes as MS pushes updates.

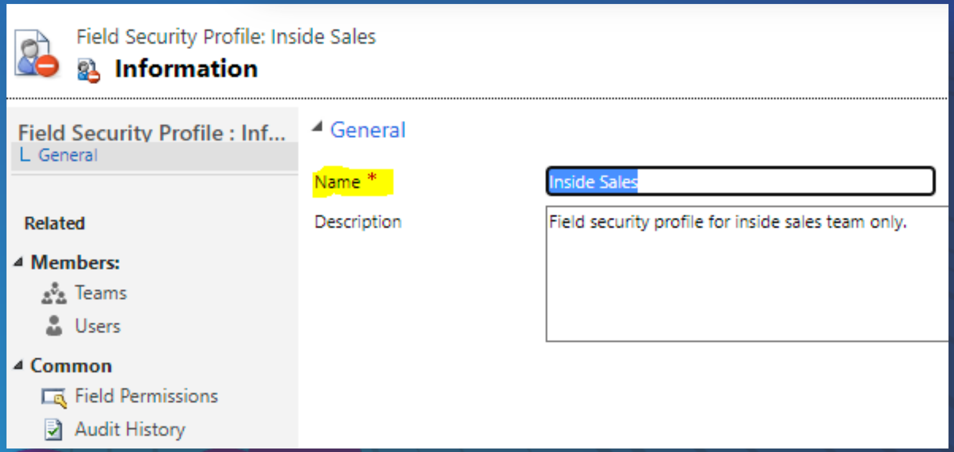


Tip #19

Field Security Profiles lock down specific column access for specific users

- Enable field security on a field (column) within an entity (table).
- **Associate an existing security profile(s).**
- **Use Field Permissions to define secured fields access.**
  - **Read**: Read-only access to the field's data.
  - **Create**: Anyone in this profile can add data to this field when creating a record only.
  - **Update**: Anyone in this profile can update the field's data after it has been created.





Tip #20

Configure the Dynamics 365 App for Outlook

Power Apps + Outlook =

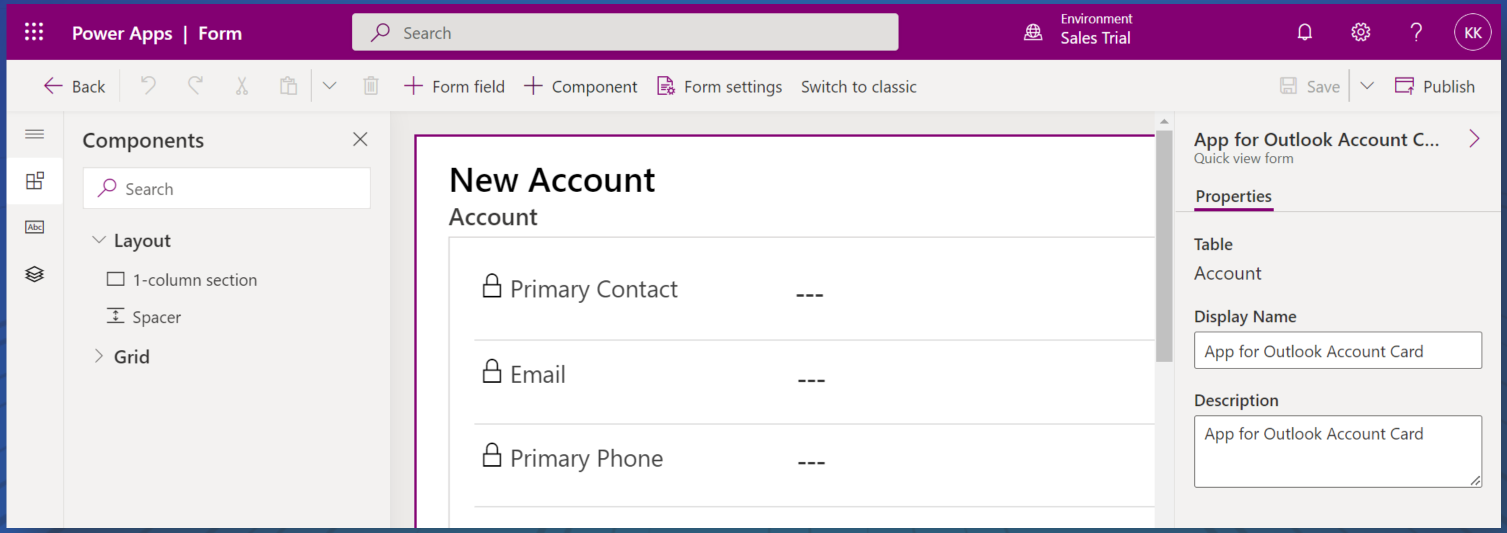
Email	Track emails with one click.
Meetings	Track Outlook meetings as D365/Power Apps appointments with one click.
New Records	Create new Lead, Account, Case, Contact & more from an Outlook email or meeting.

But… keep an eye on ***Viva for Sales*** *in this space too.*

Tip #21

Customize Forms in App for Outlook

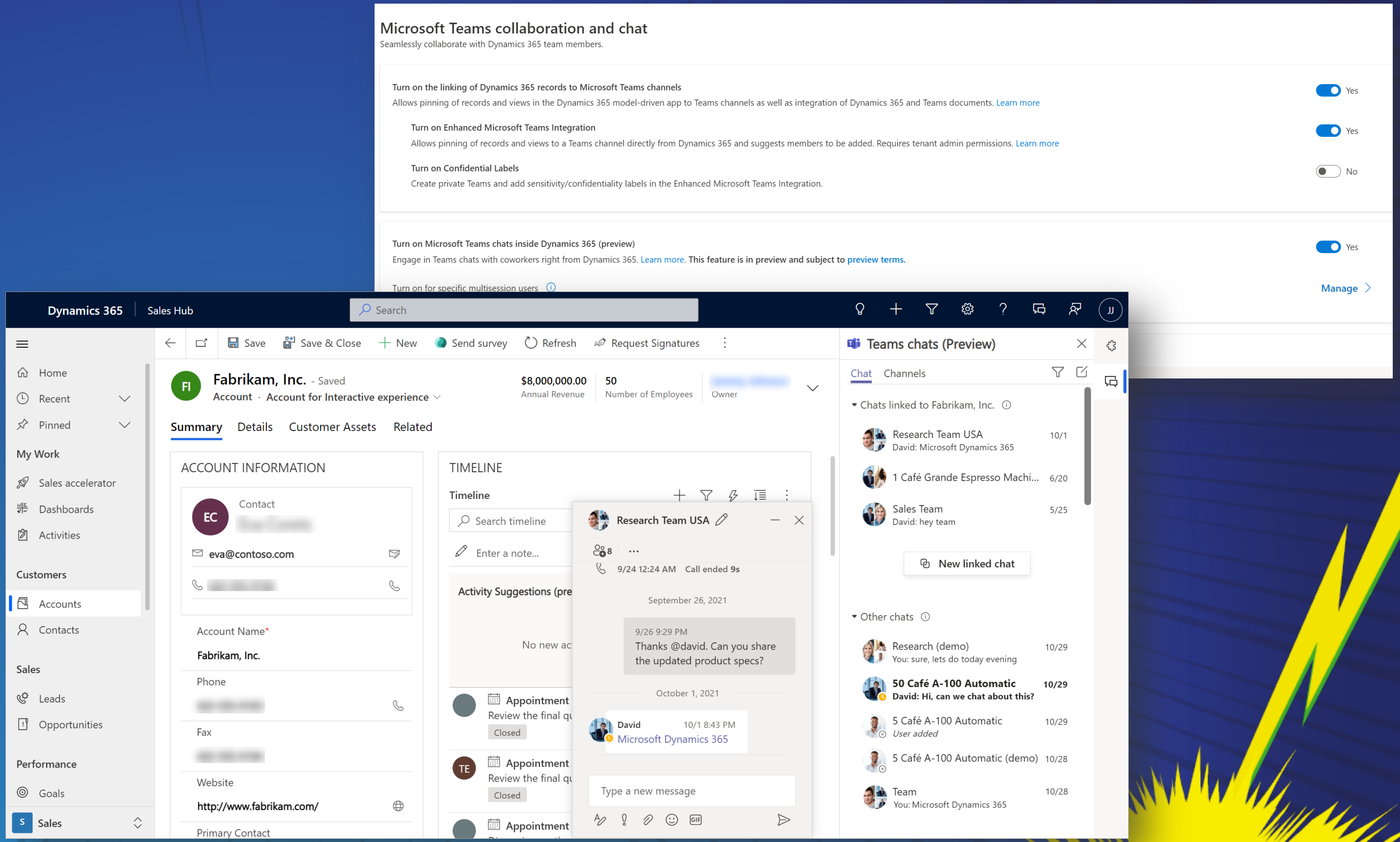
- Update the form Quick View App form Outlook Form to determine which fields are displayed on when an email is tracked



Tip #22

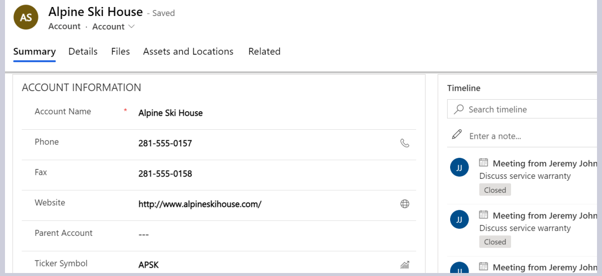
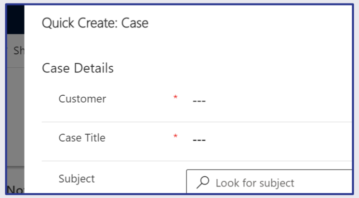
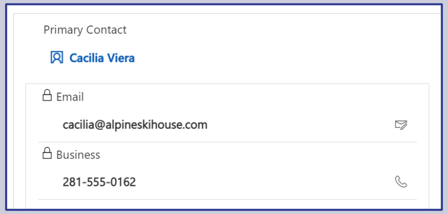
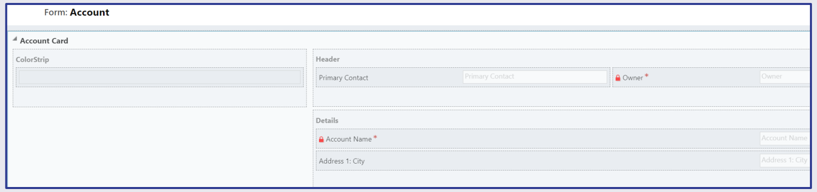
Set Up Microsoft Teams Integration

- Enhanced collaboration
- Dynamics 365 data in Teams Channels
- Teams chat in Dynamics 365
- Even more, coming soon!



Tip #23

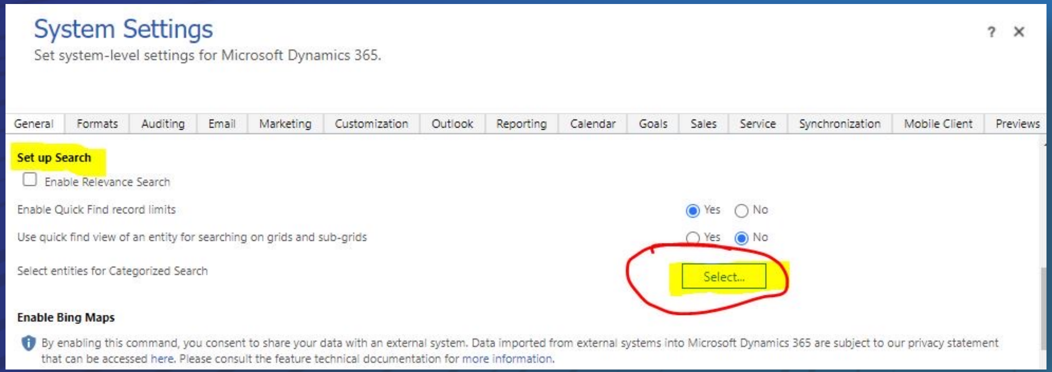
Know Your Form Types

Form Type	Details	Example
Main	These forms provide the main user interface for interacting with data.	
Quick Create	A basic form with limited fields, optimized for fast creation of a new record.	
Quick View	Displays additional data for a related record – referenced by a lookup field on the form.	
Card	Present information in a compact format that displays well on a mobile device.	

Tip #24

Global Search: Add/Remove Tables (Entities)

Switch to Classic!!!



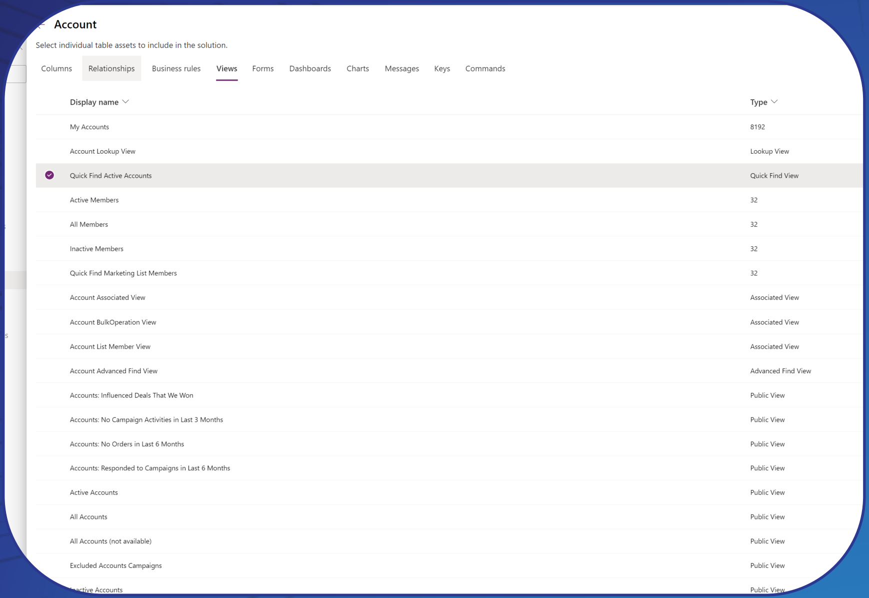
Settings > Administration

System Settings > General Tab

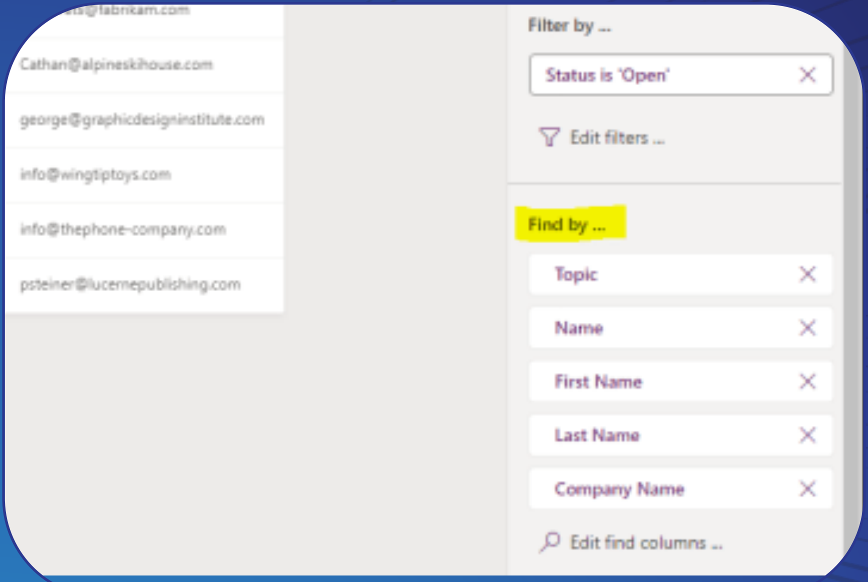
Select entities (Add/Remove)

Tip #25

Table (Entity) Search



Controlled by the **Quick Find view** for each Table (Entity)



Refine using **Filter by…** on the right-hand side

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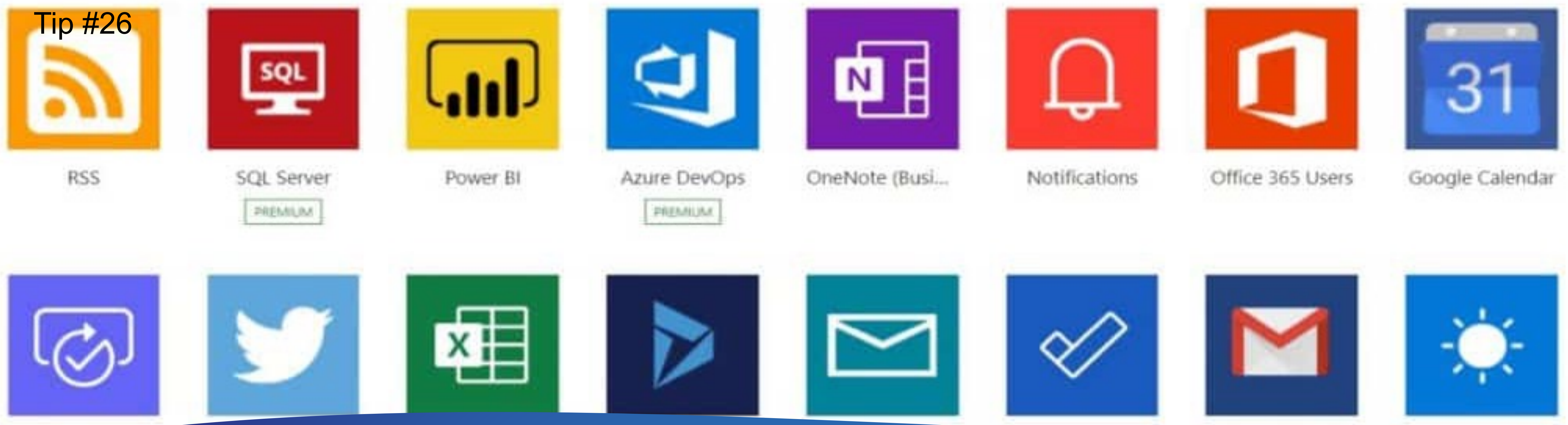
Tip #26



Automate Manual Tasks with Power Automate

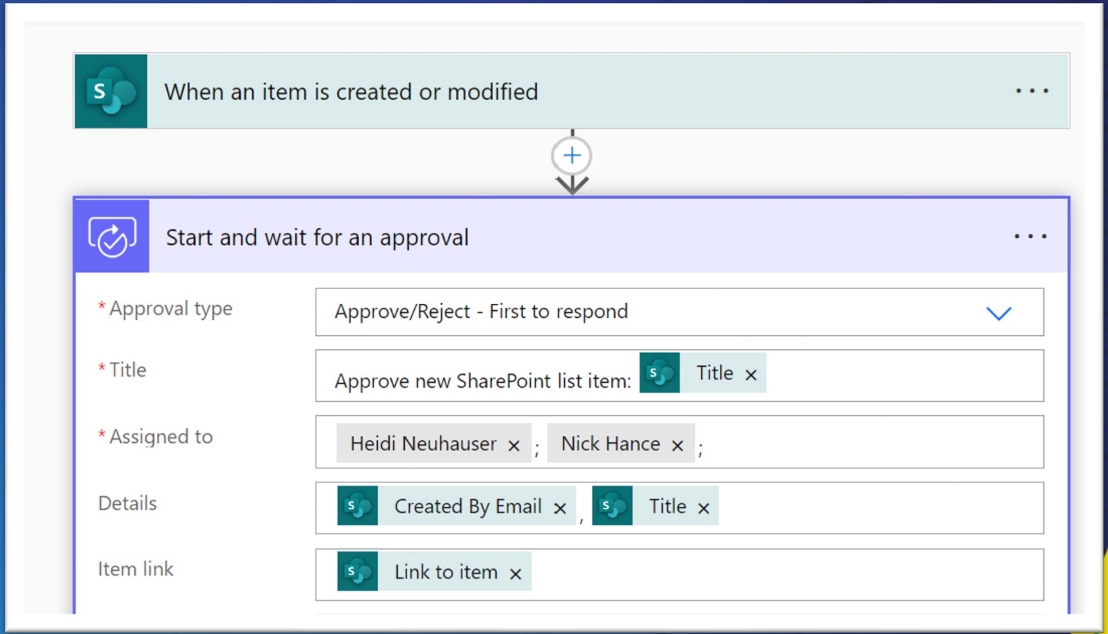
- Extend Dynamics 365 well beyond CRM with 937+ Microsoft-certified connectors
- Triggered by Dynamics 365 OR external triggers that update your Dynamics 365 data

Tip #27

Power Automate Approvals

- Use Approvals to automate any approvals in your organization

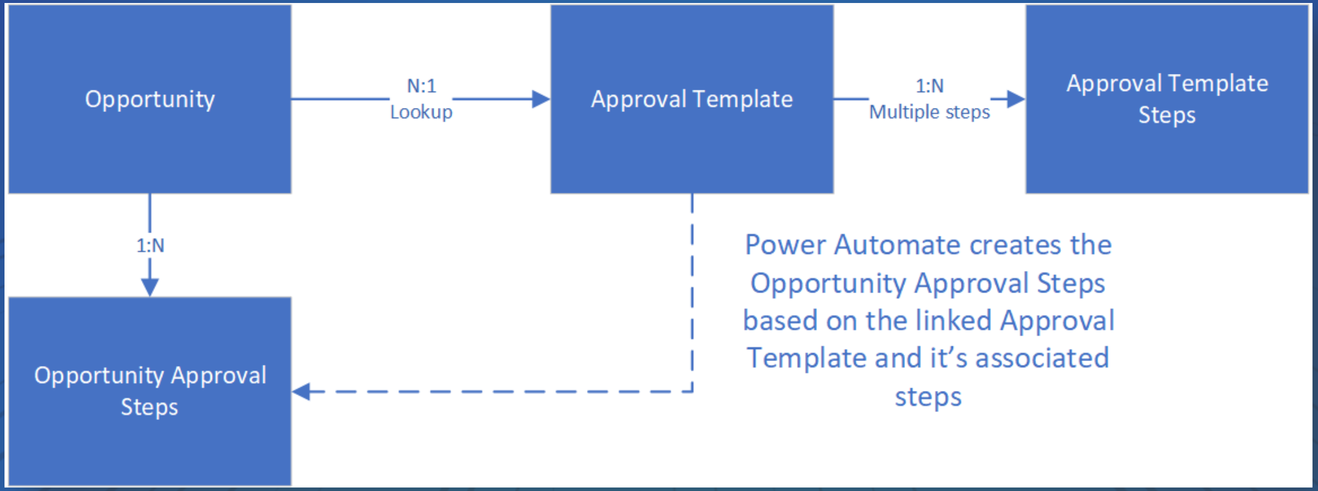
- 4 Approval Types:
  1. Approve/Reject: Everyone must approve
  2. Approve/Reject: First to respond
  3. Custom Responses: Wait for all responses
  4. Custom Responses: Wait for one response



Tip #28

Use Approval Templates

- Create an "Approval Template" Table in your environment to control multiple levels of Approvals
- Allows Approvers to be changed with data instead of modifying the Flow



Create a Variety of Training Materials

- People learn differently
- Differentiate your content to reach more learners

Visual Learners	Aural Learners	Reading & Writing Learners	Kinesthetic Learners
• Live training • Graphs • Diagrams • Flow charts • Demo • Webinar	• Live training • Lecture • Discussion Groups • Webinar • Videos • Podcasts	• Live training • PowerPoint • Quick Reference Guides • Job Aids • Labs • Handouts	• Live training • Demos • One-on-one / small group • Coaching • Labs • Case studies

Deliver Role-Based Training

Sales Users

- Sales Hub / custom app
- Lead to Opportunity Process
- Qualifying & Disqualifying Leads
- Winning & Losing Opportunities

Service Users

- Service Hub / custom app
- Case Management Process
- SLAs & Escalation Process
- Knowledge Base

Marketing Users

- Marketing app
- Campaigns
- Marketing Lists

✓ Navigation
✓ Search
✓ Changing Views
✓ Sorting
✓ Filtering
✓ Advanced Find

- Group users based on job role
- Core training topics for all users with specific training topics for different roles

Offer Ongoing Learning Opportunities

Avoid the “Big Bang” training approach

Training isn’t just at Go Live

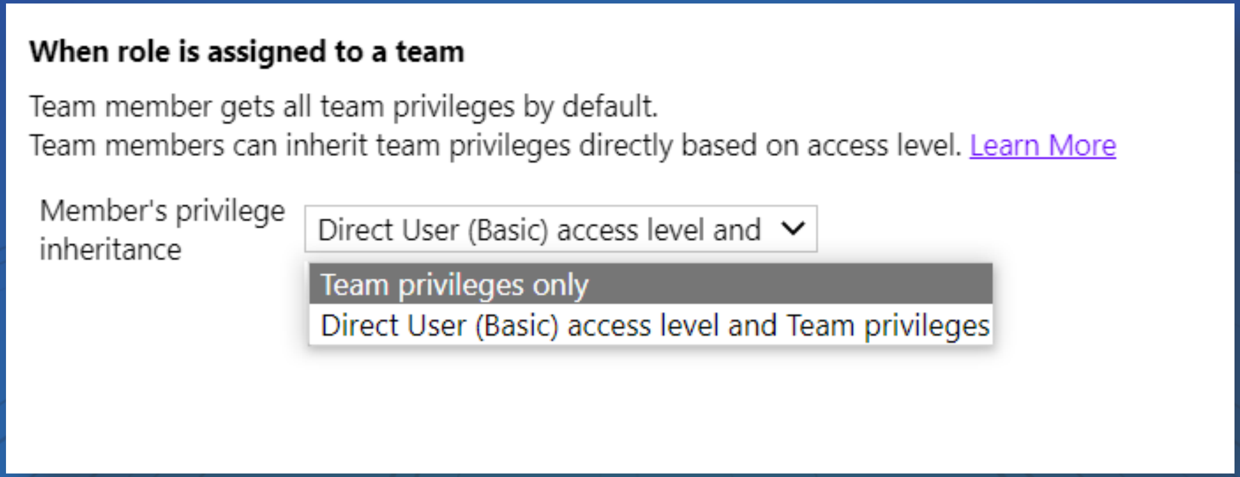
Possible ideas:

- Lunch & Learn
- Tips & Tricks
- D365 Newsletters
- Video Library

Tip #32

Security: Check Team Inheritance Setting

- Team Privileges Only: Role is in context of the Team
- Direct User (Basic) access level and Team Privileges: Role is in context of the team and user!



Tip #33

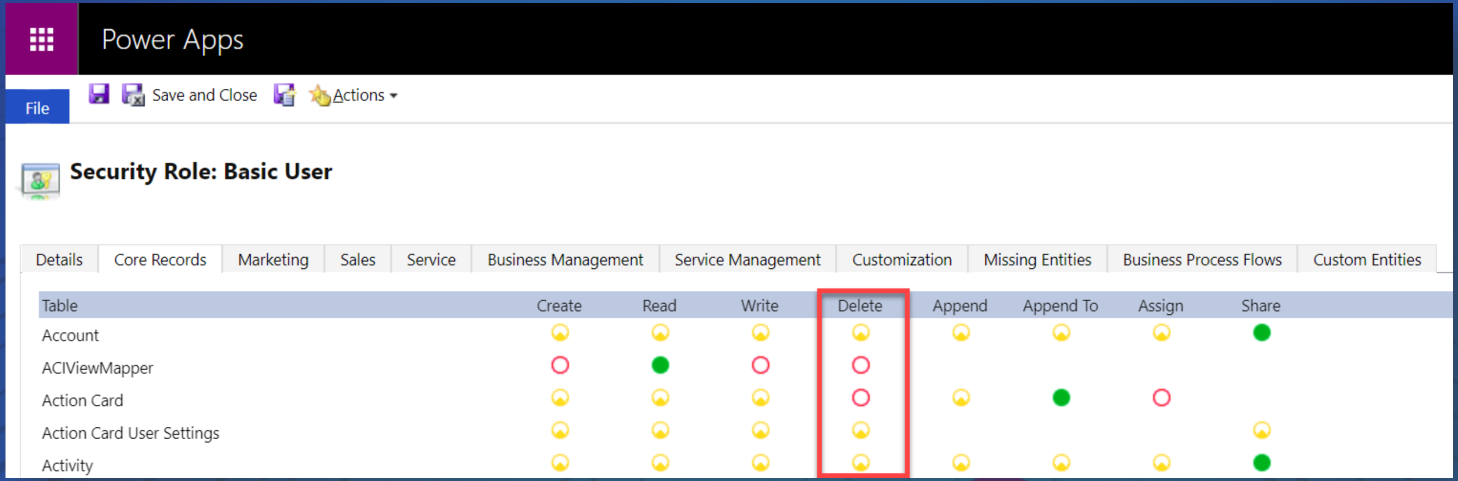
Manage Security with Teams

- Use Active Directory Groups or Office Groups to manage security with Teams
- Set up Dynamics Team linked to the Group
- Assign roles to the Team
- Security can be managed through the Group instead of by the Dynamics Admin

Tip #34

Security: Remove Delete for EVERYTHING

- Train users to Deactivate instead
- Delete should not be needed in most cases
- Bonus Tip: Click on the column or row in a Security Role to change all permissions at once!



Tip #35

Security: Check for Dangerous Permissions

- Bulk Delete
- Bulk Edit
- Export to Excel

Privacy Related Privileges

Enabling these privileges will allow users to extract customer data from Microsoft Dynamics 365. For more information, review the corresponding user documentation.

Document Generation	●	Dynamics 365 for mobile	●
Export to Excel	●	Go Offline in Outlook	●
Mail Merge	●	Print	●
Sync to Outlook	●	Use Dynamics 365 App for Outlook	●

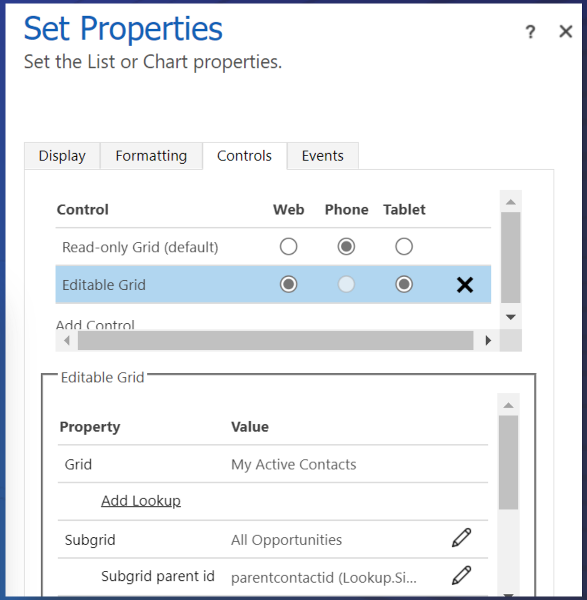
Miscellaneous Privileges

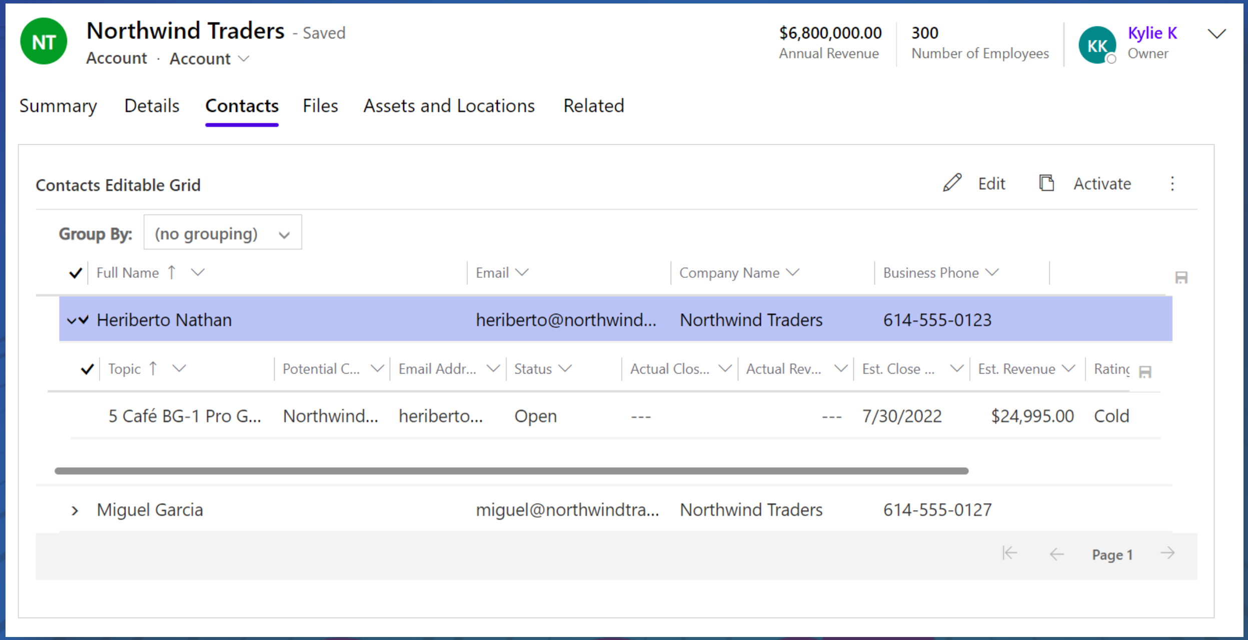
Act on Behalf of Another User	○	Approve Email Addresses for Users or Queues	○
Assign manager for a user	○	Assign position for a user	○
Assign Territory to User	○	Bulk Edit	●
Change Hierarchy Security Settings	○	Dynamics 365 Address Book	●
Enable or Disable Business Unit	○	Enable or Disable User	○
Language Settings	○	Merge	●

Tip #36

Editable Grid – Edit 2 levels of records!

- Use Editable grids to show related records of your related records – 2 hops away!
- Must be set up in Classic

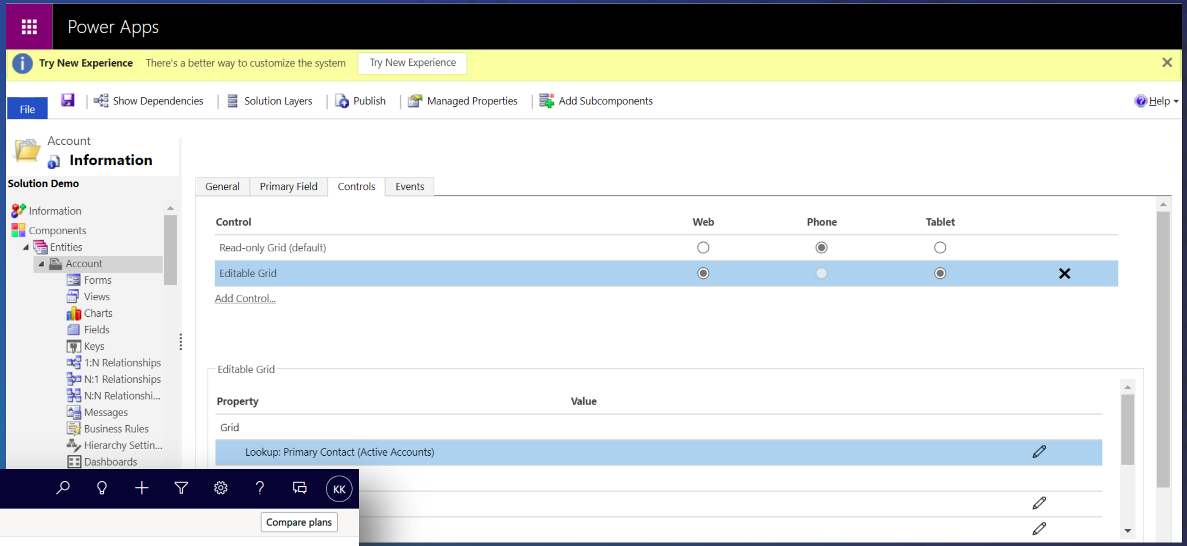


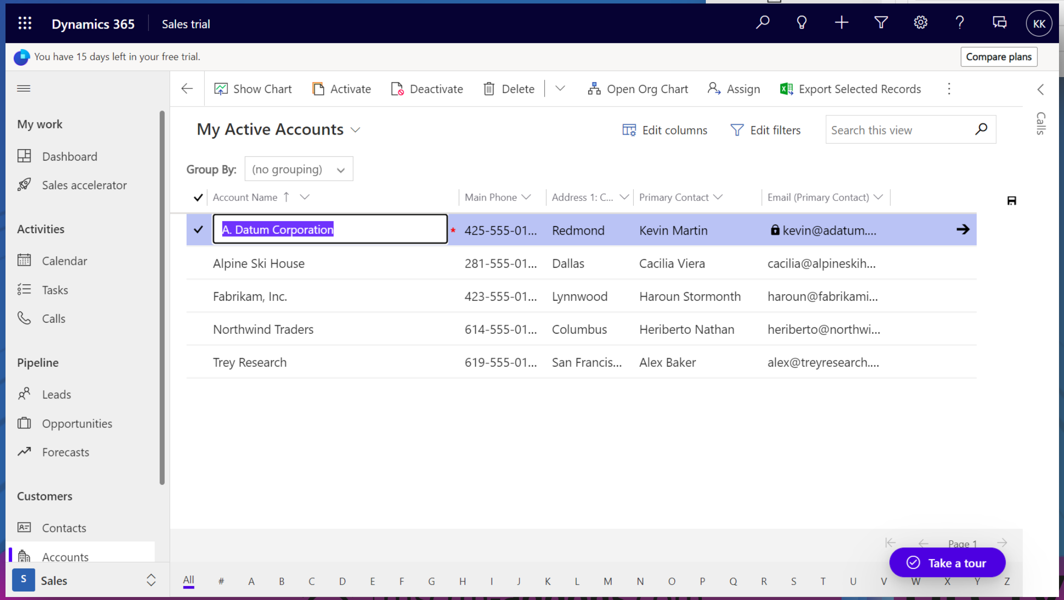


Bonus Tip

Editable Grid – Enable for a Table

- Editable Grid can be set up for views from the main workspace!
- Must be set up in Classic



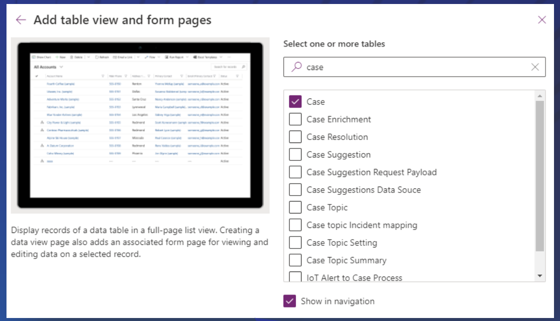


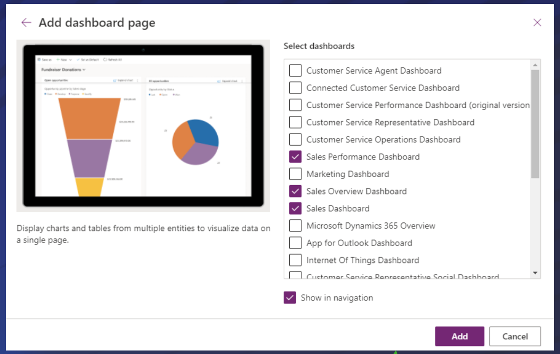
Microsoft

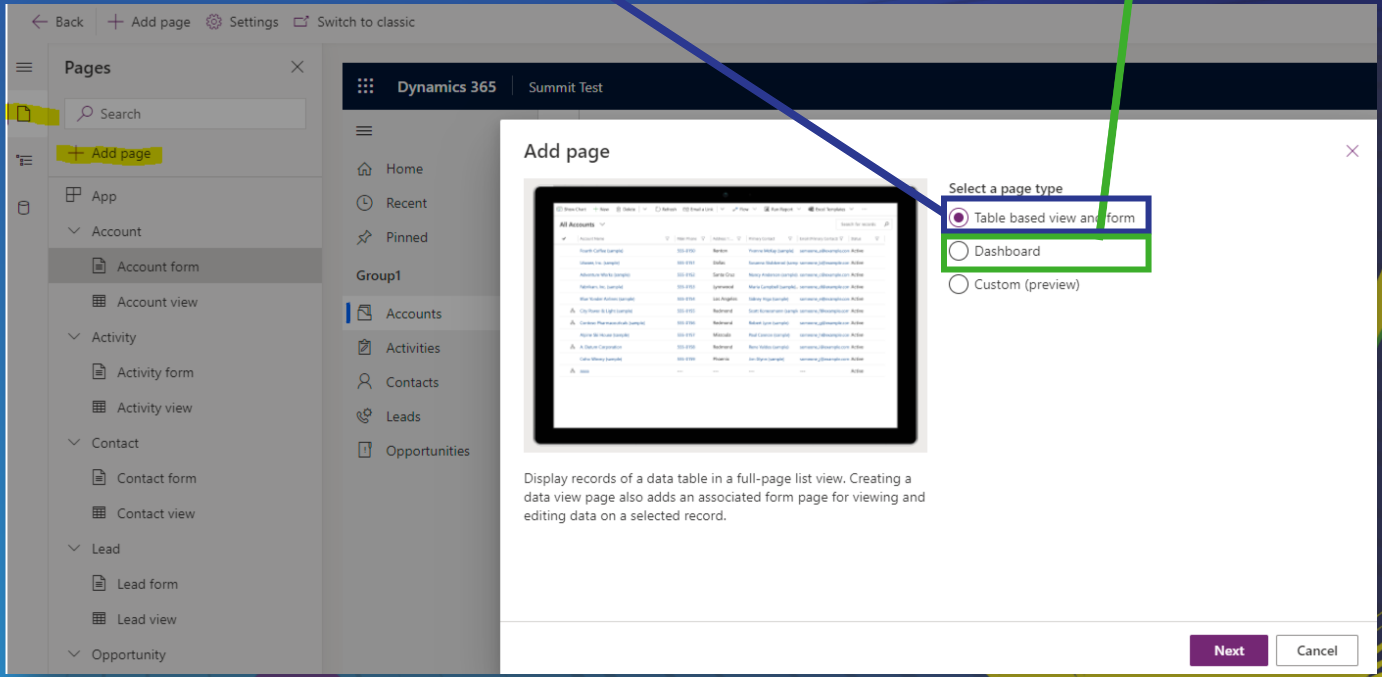
Tip #37

Add Pages to Enhance your App

1. Click the Pages icon
2. Click + Add page
3. Select page type from the list
4. Click Next
5. Select Details
6. Click Add



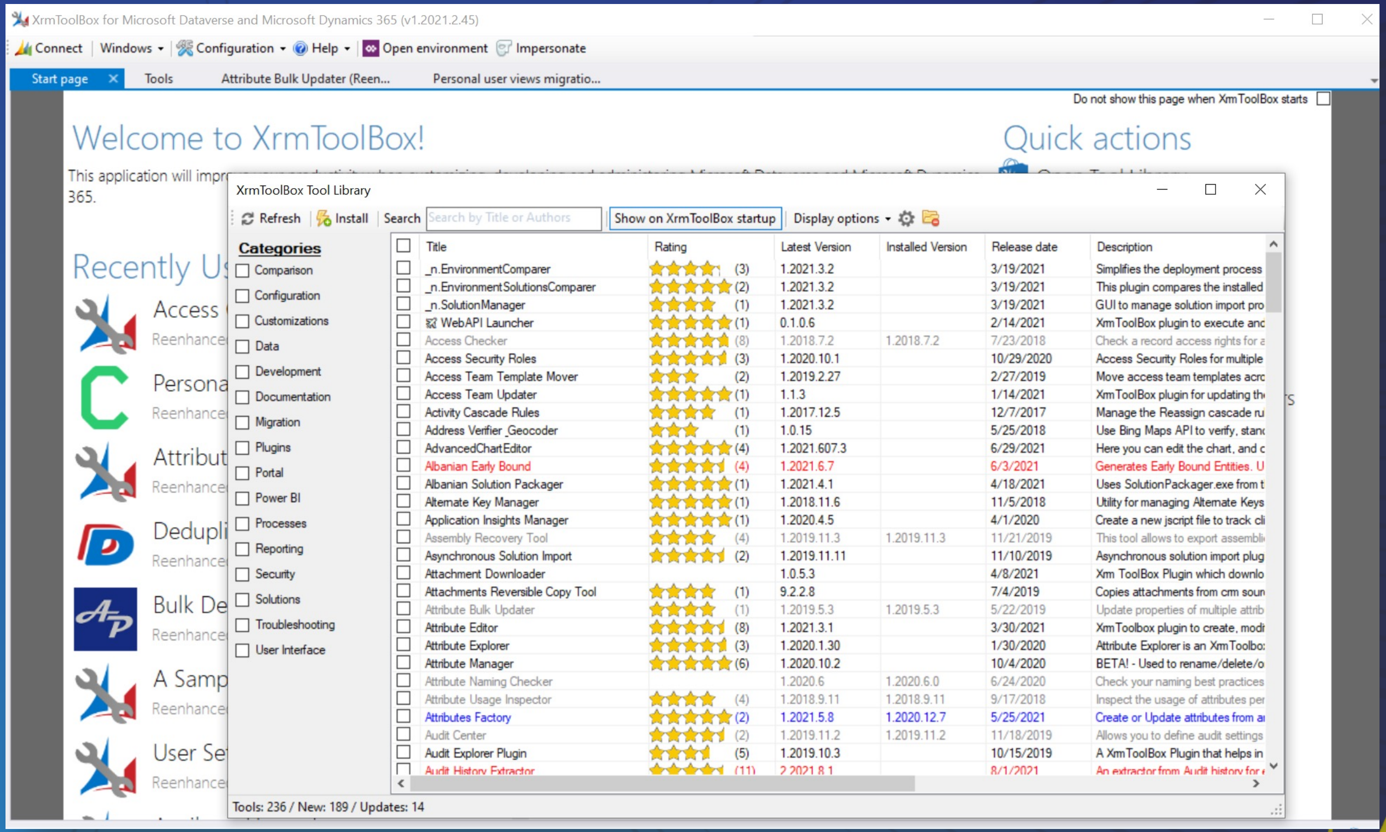




Tip #38

Use the XrmToolBox

- Go to www.xrmtoolbox.com & download the latest version
- Install the XrmToolBox
- Connect your instance(s)



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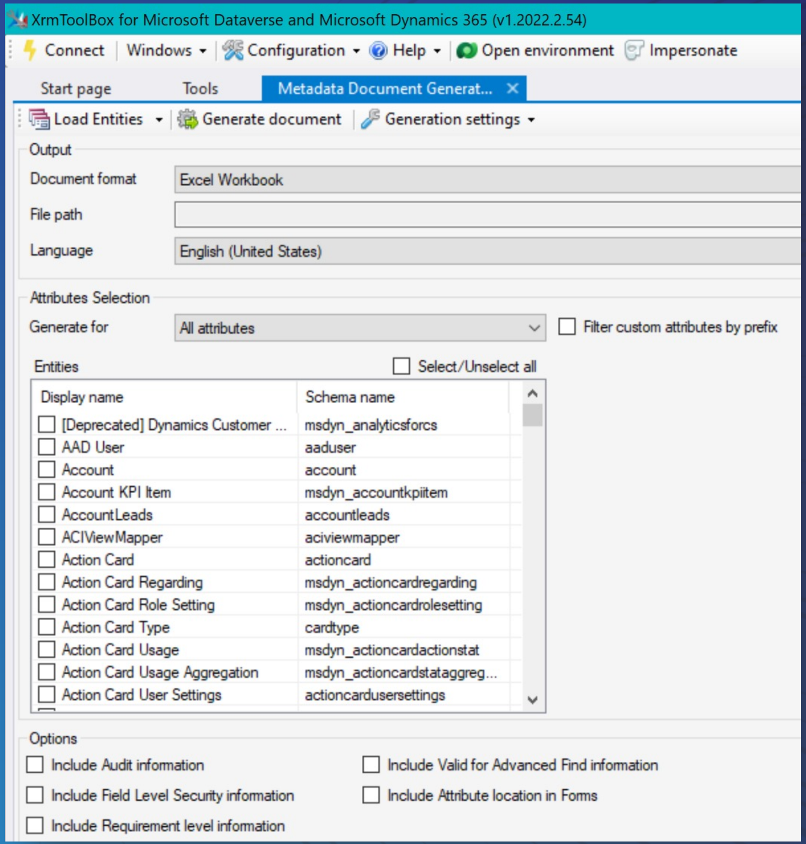
Tip #39

Documentation: Metadata Document Generator

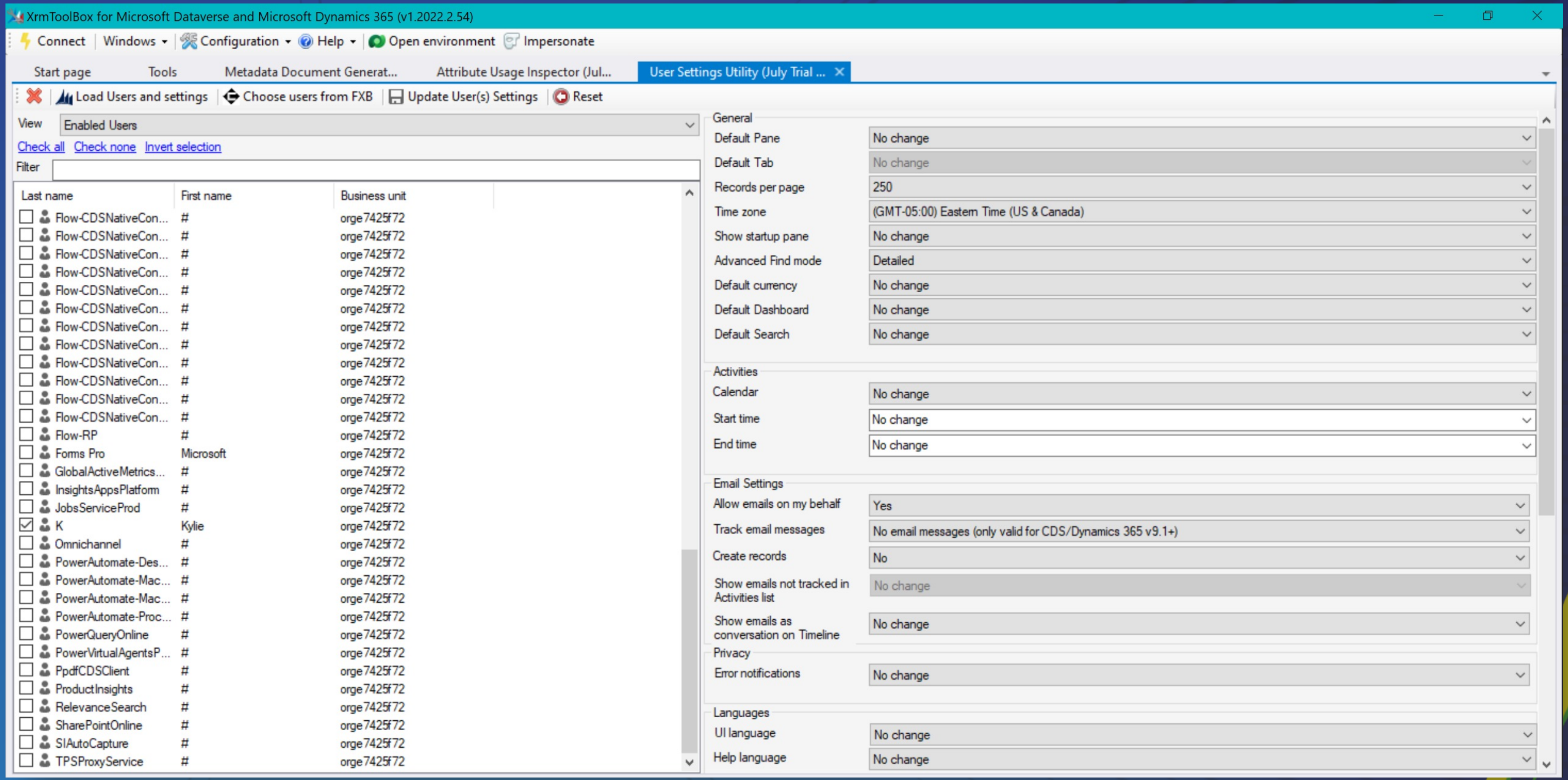
- Export metadata for Tables
- Include Form information for potential cleanup
- Great documentation starter!



Tip #40

Set User Settings for them

- XrmToolBox: User Settings Utility
- Set # of records in Views
- Set Email Tracking Options



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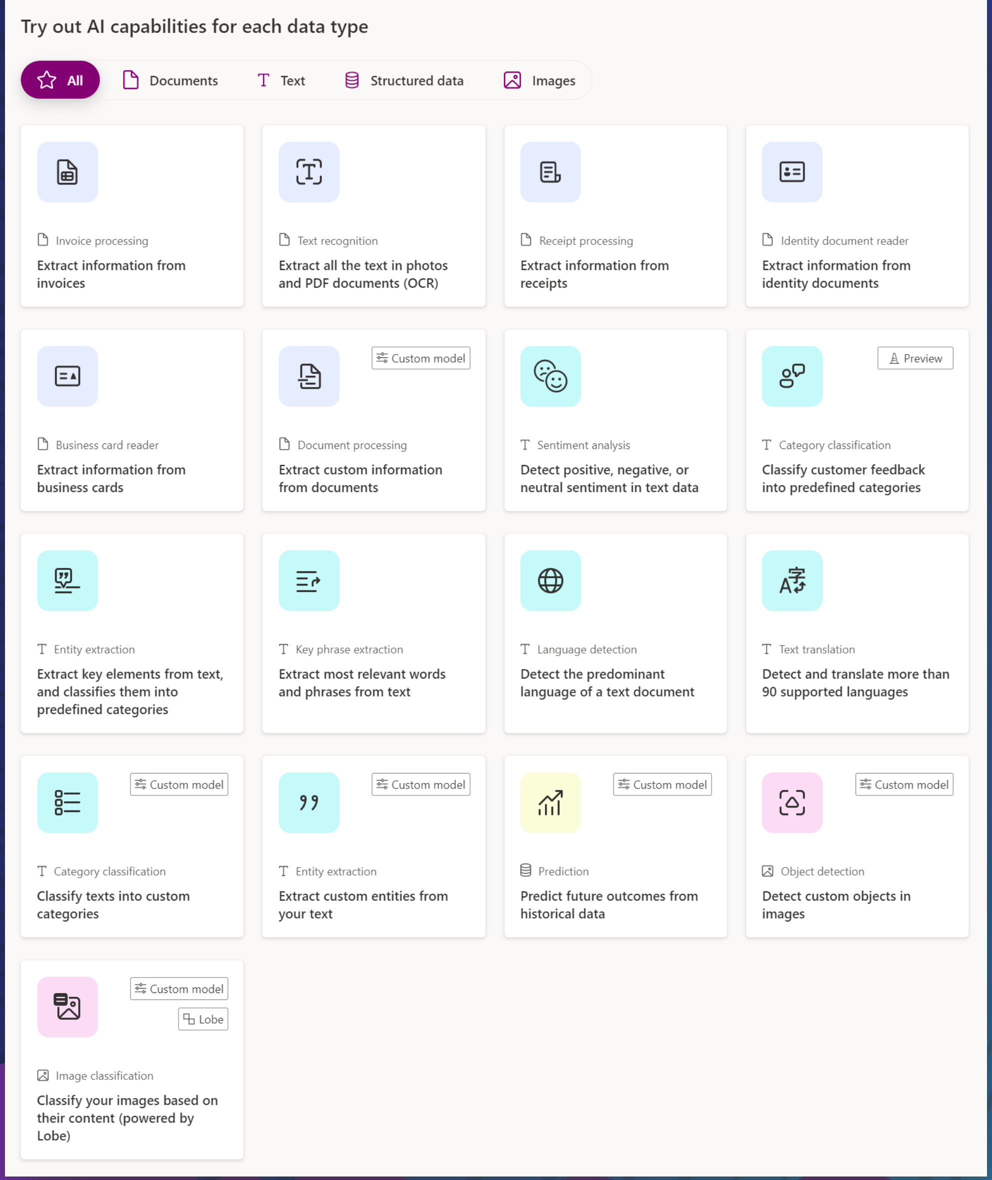
Tip #41



AI Builder

- **Use AI Builder to infuse AI into your processes**
- **Includes pre-built and ready to use models and models that can be trained**

Tip #42

Embedded Canvas Apps

- Want more flexibility in your Model-Driven Apps? Create a Canvas App and embed it!

Tip #43

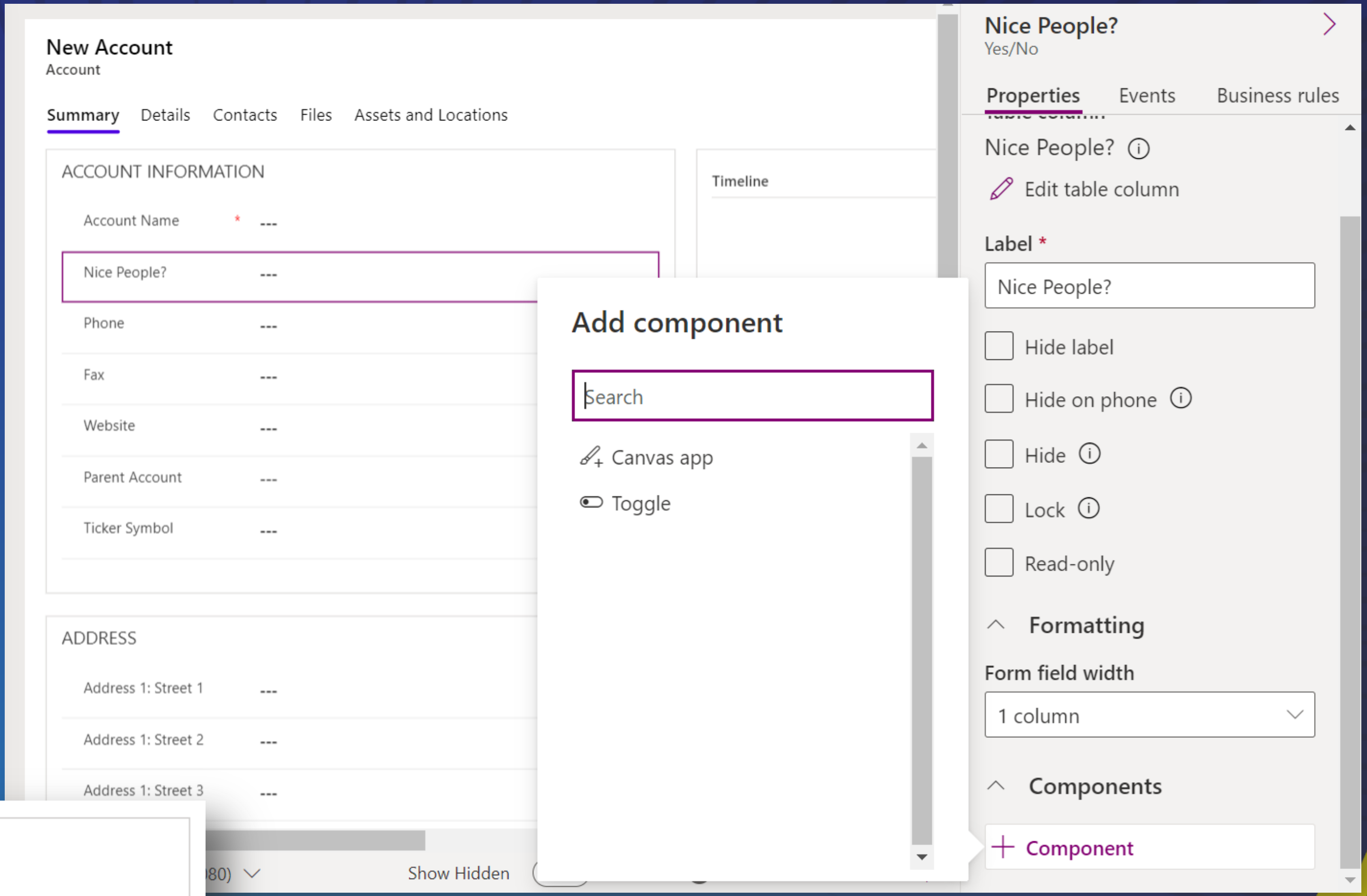
Embed Power BI Dashboards in Dynamics

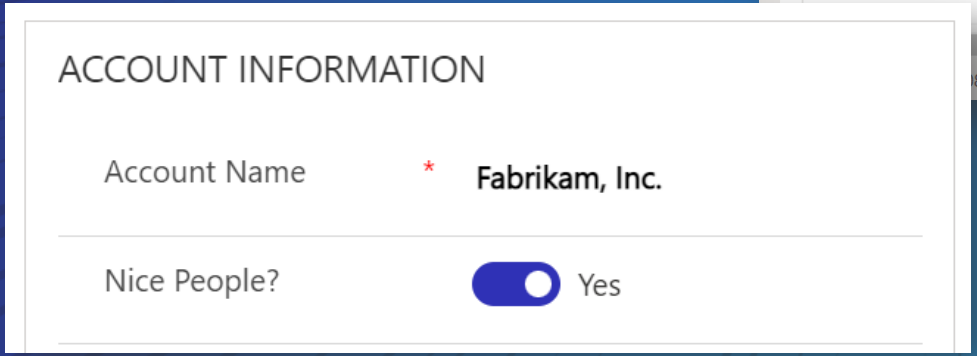
- Give users a one-stop place for all their data
- Add Power BI Dashboards as Dynamics 365 System or Personal Dashboards
- Must be enabled in Power Platform Admin Center for each environment
- Users must have direct access to the Dashboard (not just workspace)

Tip #44

Use Controls

- Change your field controls to improve look and feel
- Ex. Use a Toggle for yes/no fields

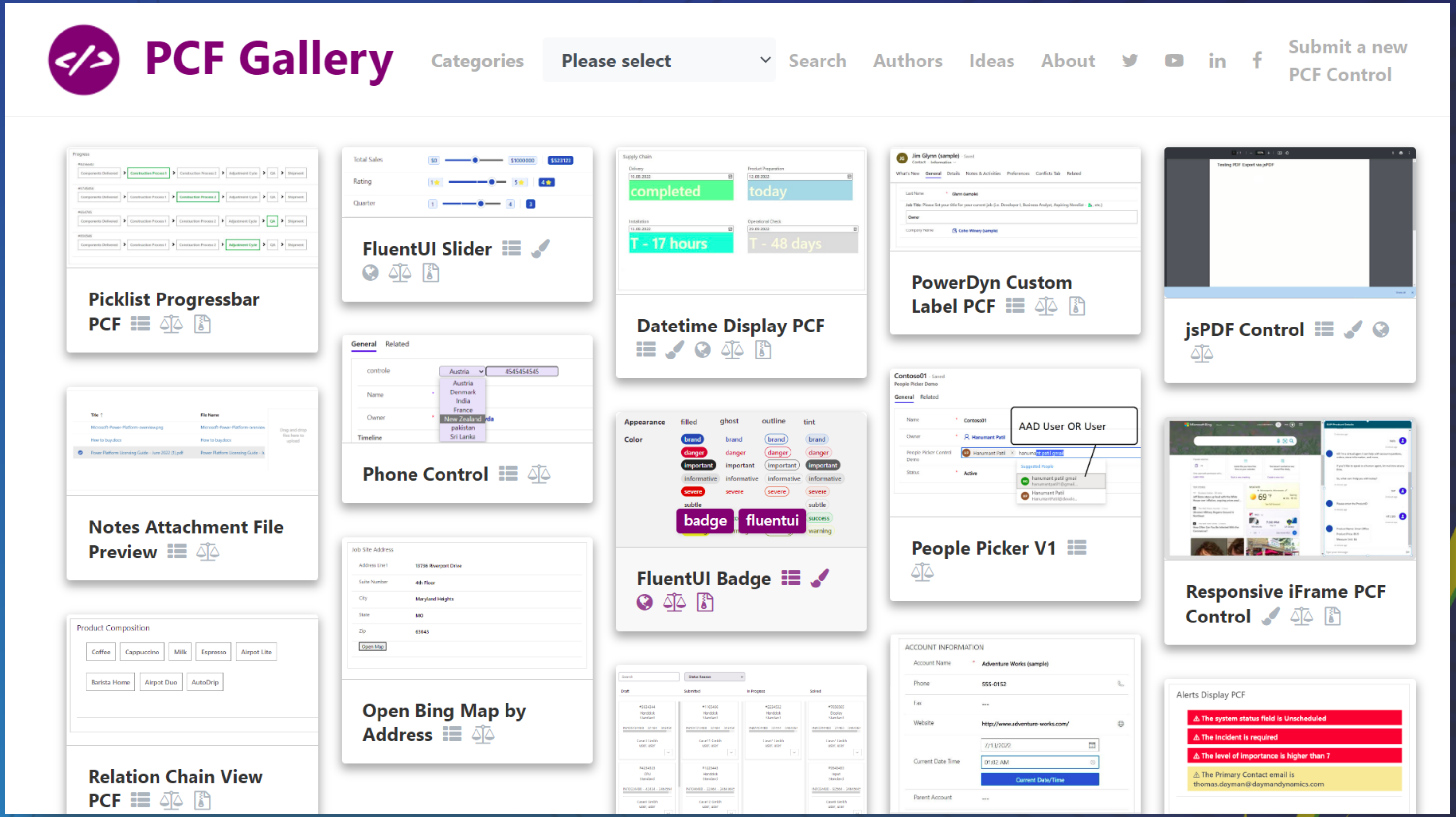




Tip #45

PCF Gallery

- Want more controls?
- Check out PCF Gallery for free community controls
- **Bonus Tip:** You can also create your own PCF Controls to customize your forms



Microsoft

mscrm-addons.com
Your company for MS-CRM ADD-ONS!

urely CRM

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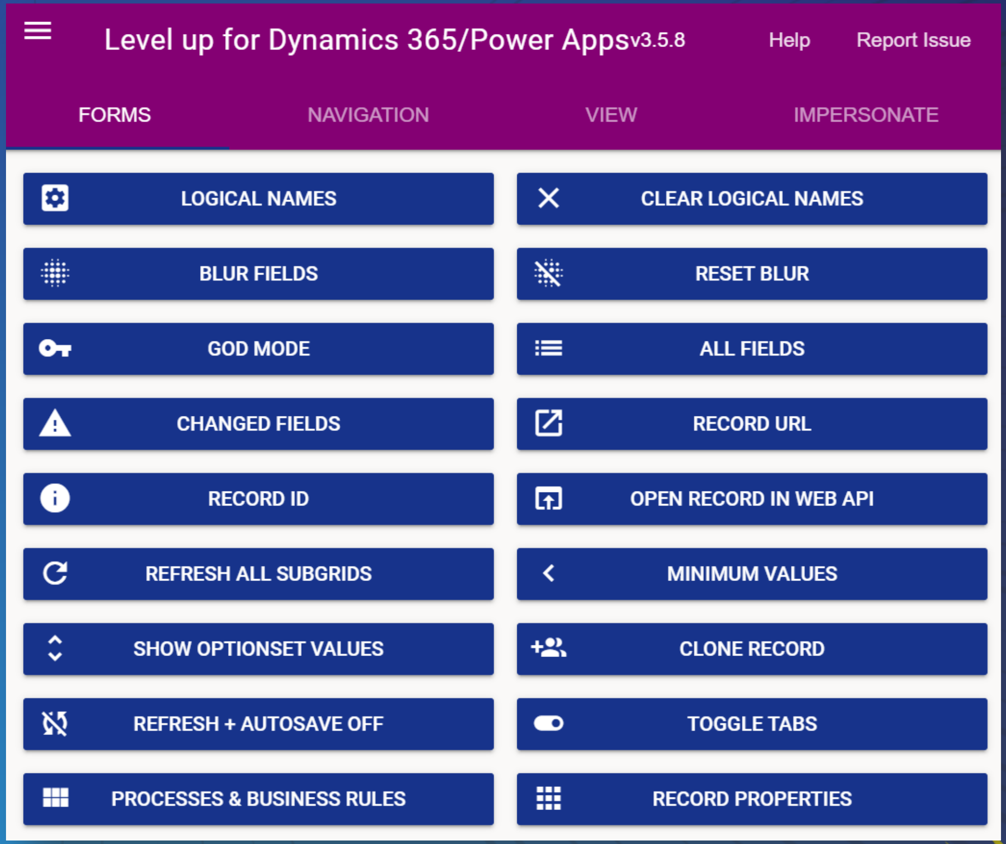
Tip #46

Level Up!

- Use Level Up to see logical column names, see hidden fields, impersonate users, etc.
- Level Up Edge Extension



Tip #47

Other Great Community Resources

- [Local User Groups]
- [Power Platform Weekly Newsletter]
- [PCF Gallery]
- [Connector Review]

Tip #48

Microsoft Learn

[Power Platform Fundamentals]

[D365 Fundamentals: Customer Service]

[D365 Fundamentals: Sales]

[D365 Fundamentals: Marketing]

[Configure forms, charts & dashboards in model-driven apps]

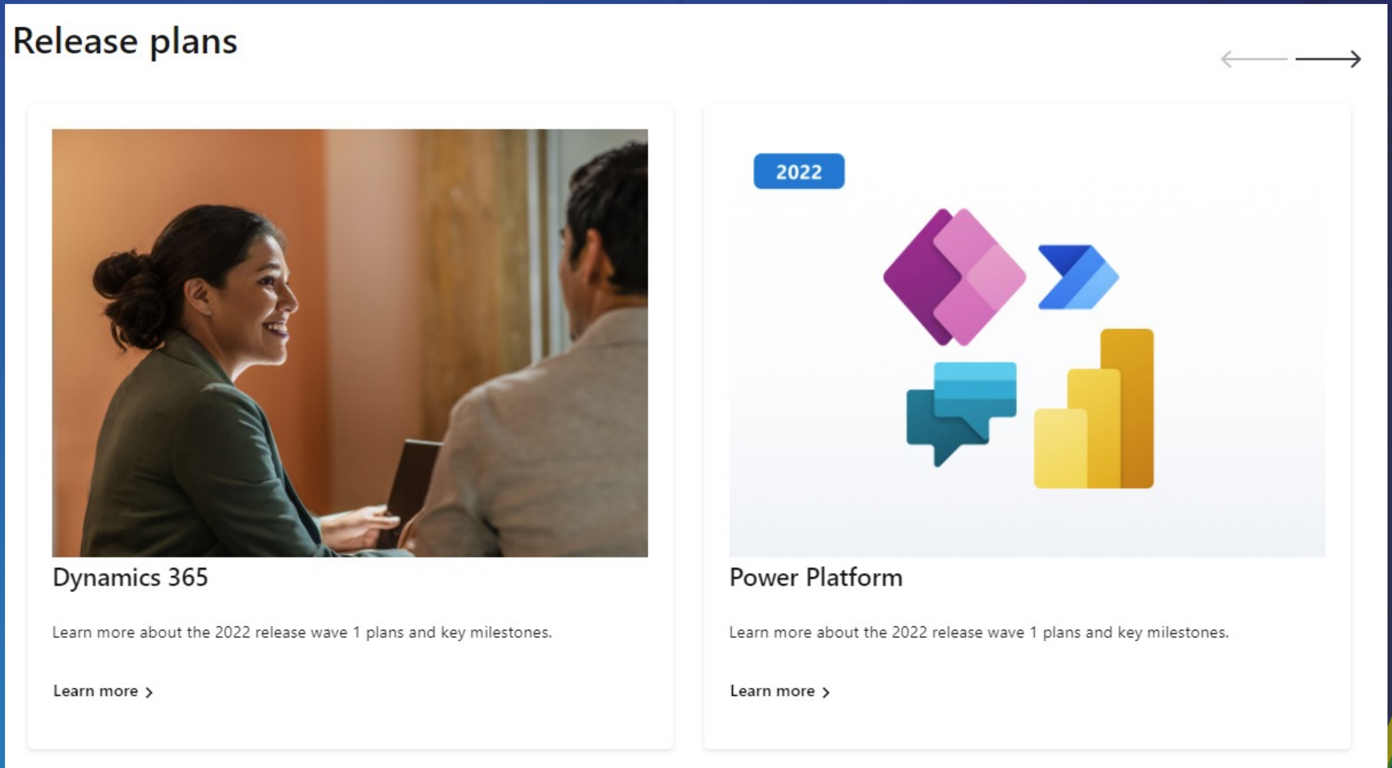
[Success by Design]

Tip #49

Read the Release Notes Table of Contents

- Link to all Release Plans

- 2022 Release Wave 2 Plane (October 2022 - March 2023 Updates):
    - Power Platform
    - Dynamics 365



Final Tip! - #50

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Heidi Neuhauser

heidi@reenhanced.com

LinkedIn.com/in/heidineuhauser/

CRMHeidi.com

@CRMHeidi

YouTube.com/CRMHeidi

Kylie Kiser

Me@KylieKiser.com

LinkedIn.com/in/kylie-kiser/

KylieKiser.com

@KylieKiser

YouTube.com/KylieKiserPowerPlatform

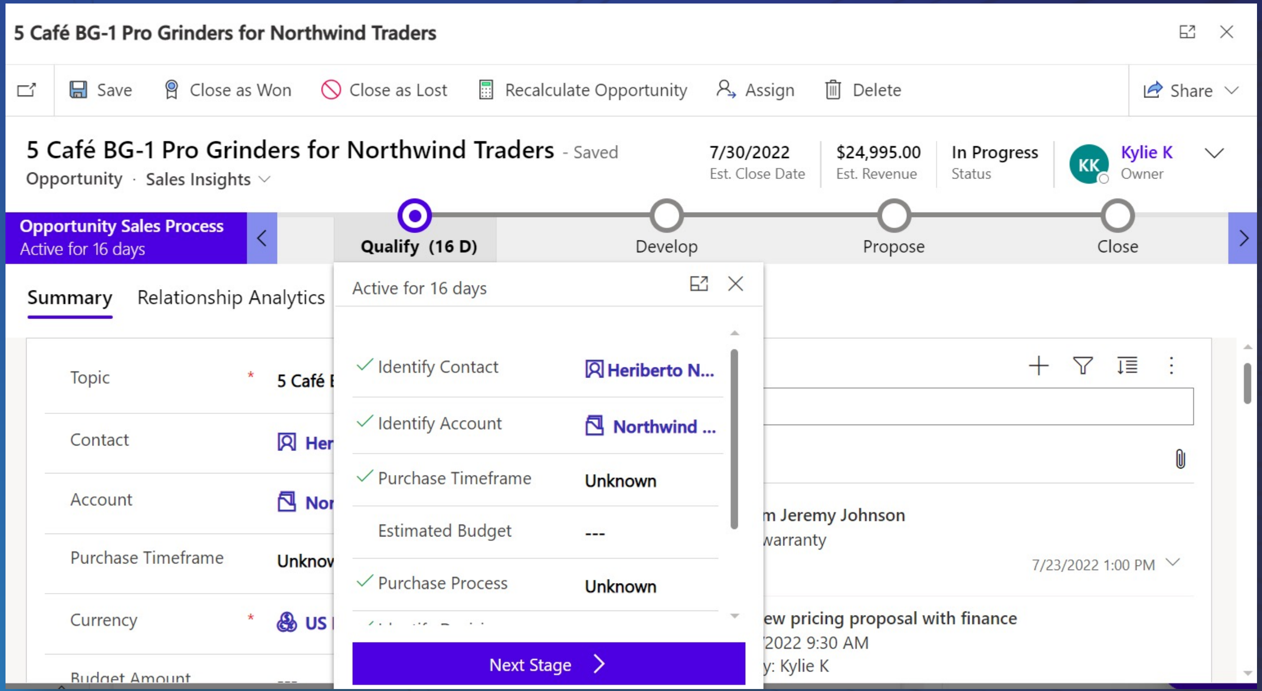
Bonus Tips

Solutions

- Use Solutions to move configuration and automation between environments
- Managed Solutions is the recommended Approach

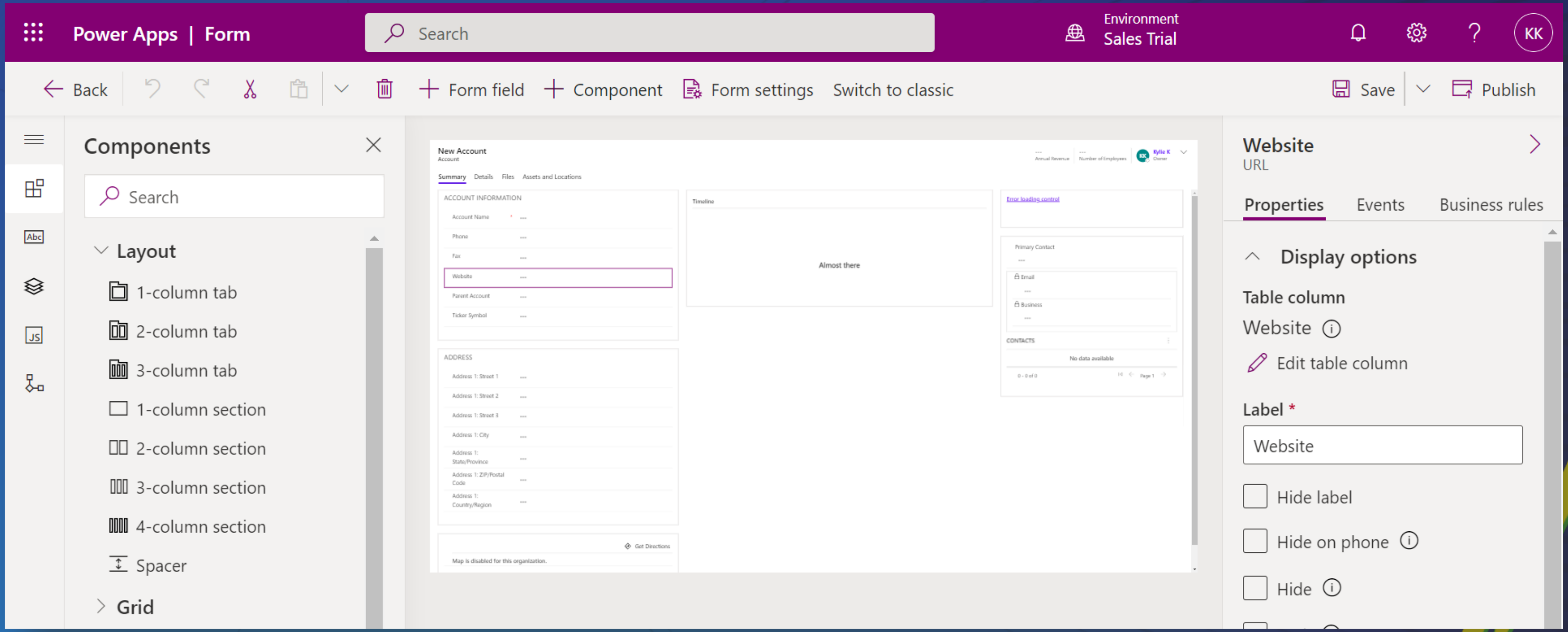
Streamline your business processes

- **Available tools:**
  - Business Process Flows
  - Power Automate



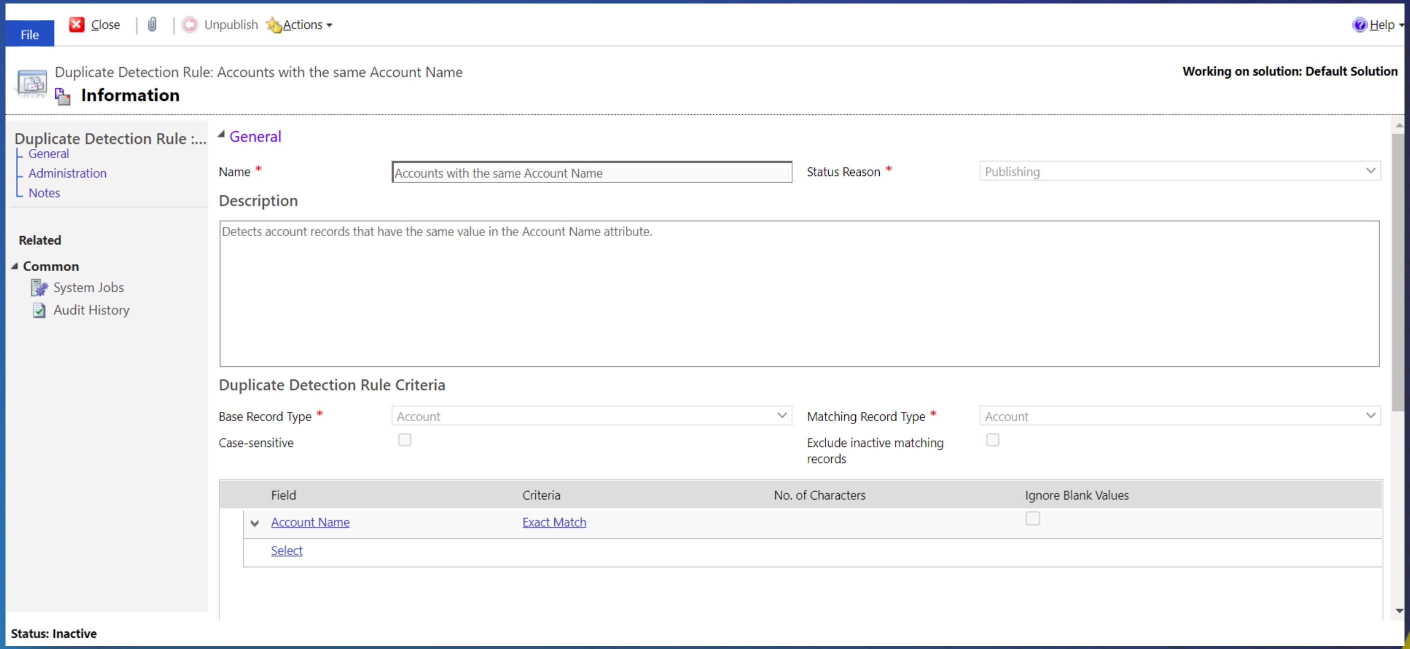
Keep your forms clean

- **Tools to help:**
  - Form designer
  - Tabs
  - Business Rules / JavaScript



Set up your own Duplicate Detection rules

- Edit out of the box duplicate detection rules
- Create your own to fit your business
- Move with Solutions to other environments!



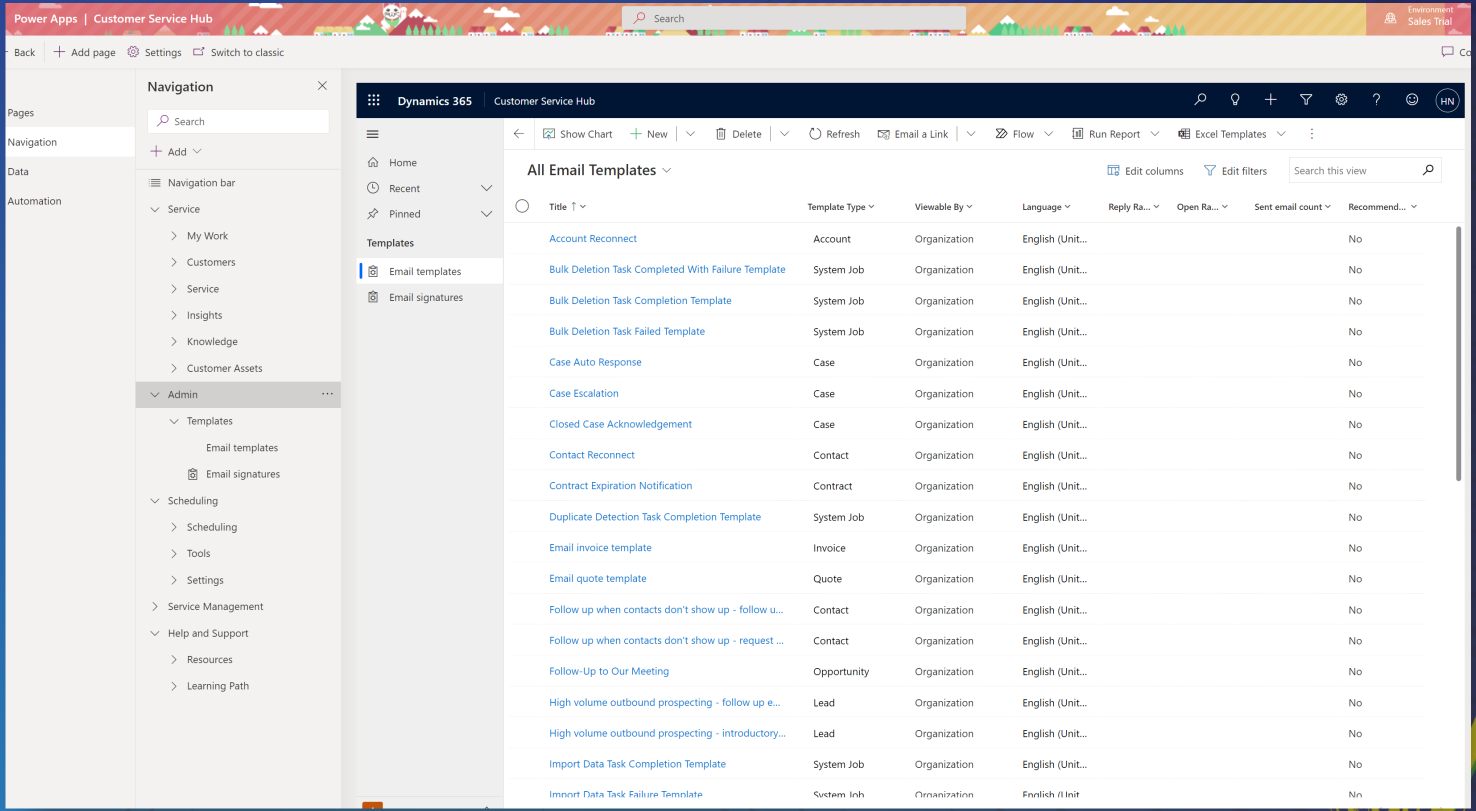
Security: Remove Sharing

- Do you really need this?
- Creates overhead and potential performance impact if used as a basis for security
- Clean up the ribbon and remove access

Add an Admin Area to Your App Navigation

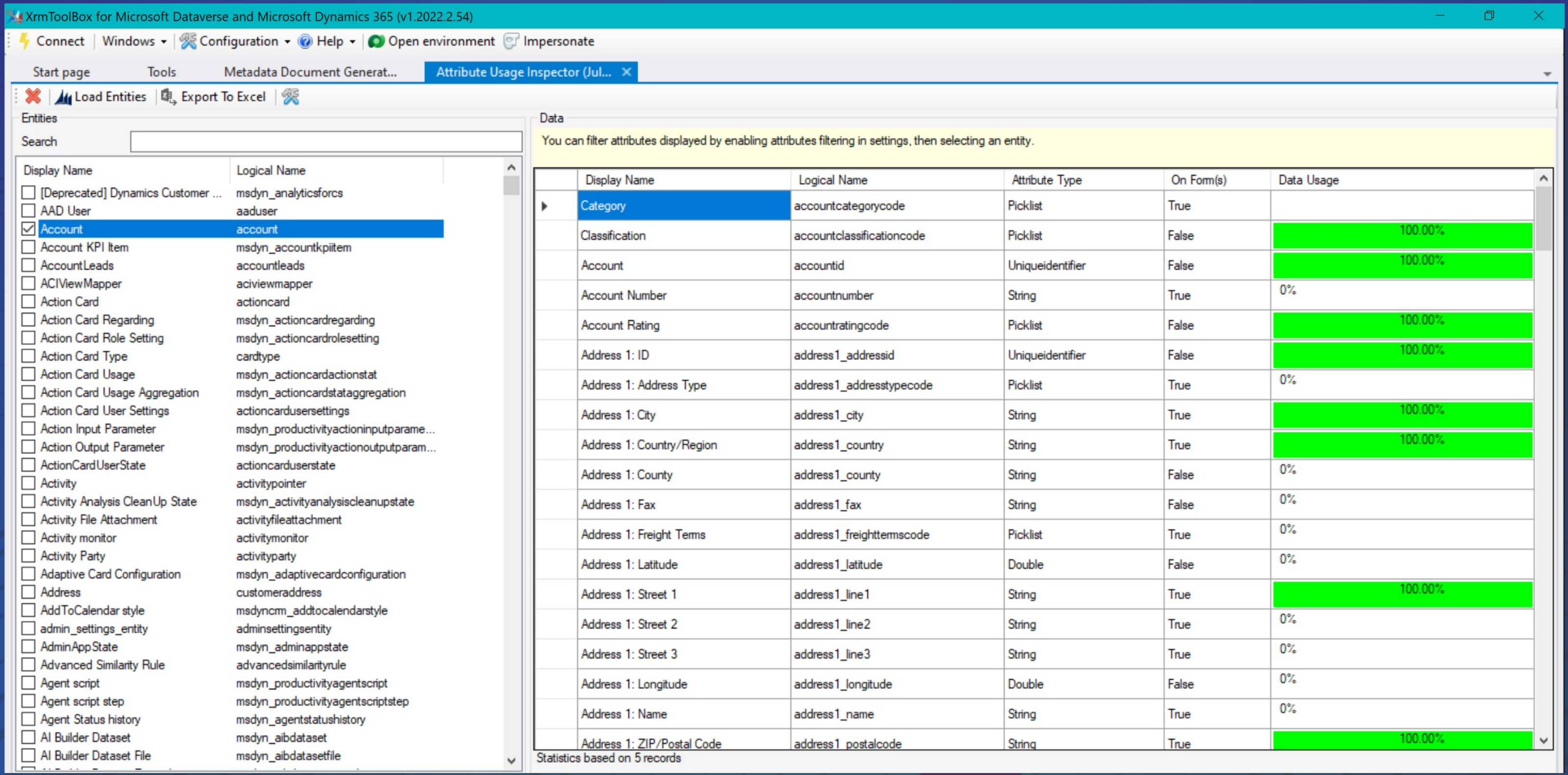
- Add an Admin area for less used items

- Navigation > +Add > Area



Find Fields not in use

- XrmToolBox: Attribute Usage Inspector



CoE Starter Kit

- Use the Center of Excellence Starter Kit to help with ALM, User Adoption, and More!
- https://docs.microsoft.com/en-us/power-platform/guidance/coe/starter-kit

Microsoft Docs

Customer Service

Sales

Marketing

All Dynamics 365 Docs

Turn on New Features

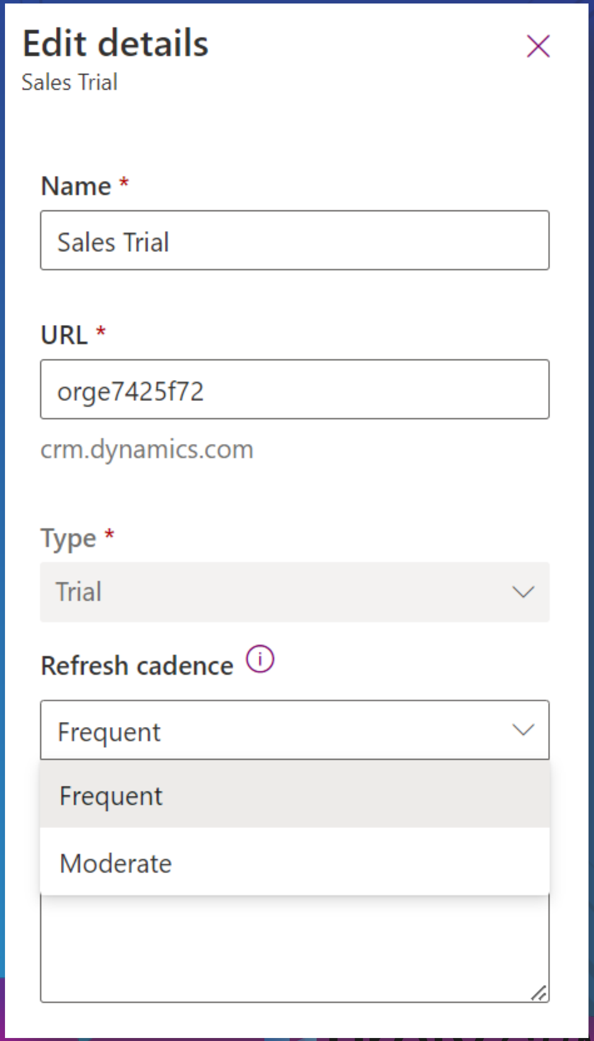
- Test your upgrades in a development environment
- Power Platform Admin Center > Environment > Settings > Features
- Make.Preview.PowerApps.com

Assign a Security Group

- Assign your environment to a Security Group so that only necessary users are added

Set your Refresh Cadence

- Set your environment Refresh Cadence to determine how often you get updates from Microsoft



Email a Link

- Turn on Collaboration Preview to get Email a Link button back!
- Power Platform Admin Center > Settings > Features

Collaboration

Enable preview of the modern link sharing UI, co-presence, online status in model-driven apps. Learn more

On

Co-presence indicator refresh interval

60 Seconds

End users can add and join Teams meetings from appointments in model-driven apps. Learn more

Off

Find the Best Mobile App for Users

- Dynamics 365 Sales – Optimized for sellers. Not optimized for Offline.
- Dynamics 365 for Phones – old version. Allows going offline.
- Power Apps – modern version of Dynamics 365 for Phones. Offline is still in preview.