

A DYNAMICSCON PRESENTATION



POWERED BY  DUG

DYNAMICSCON VIRTUAL

MARCH 2023

CUSTOMER
ENGAGEMENT

DYNAMICSCON.COM

50 Tips in 50 Minutes



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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.

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

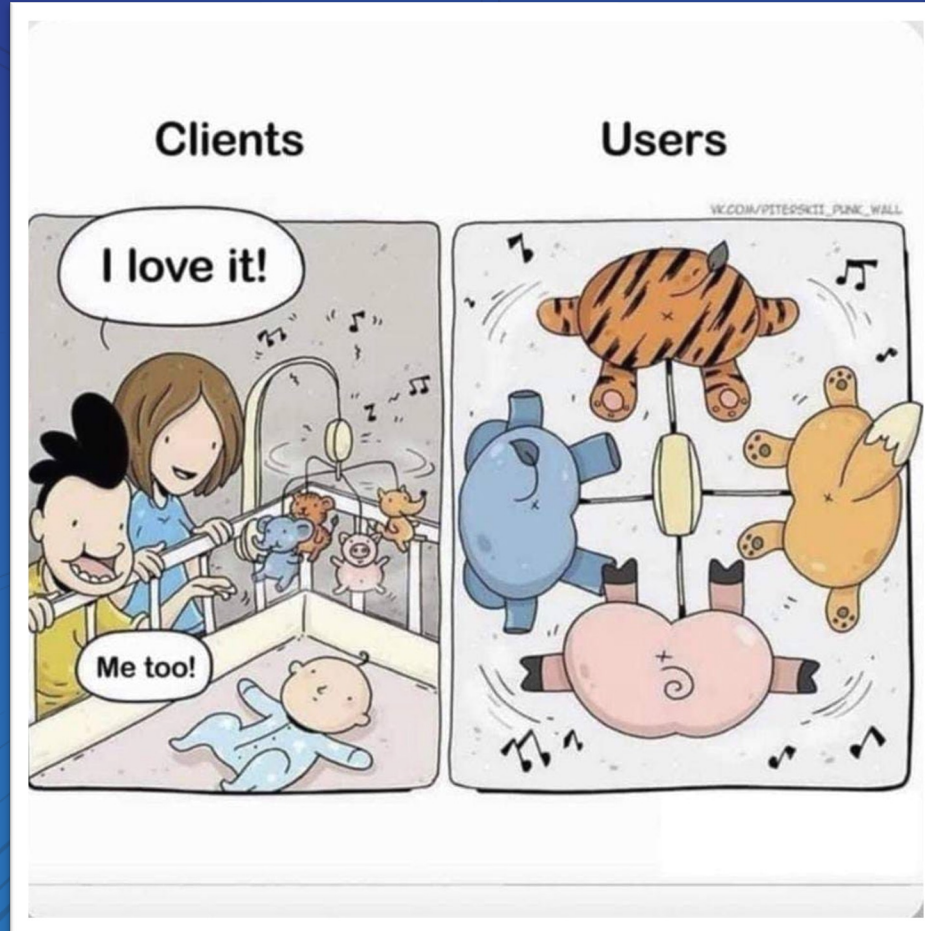
Form a Group of End Users



- ✓ **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**

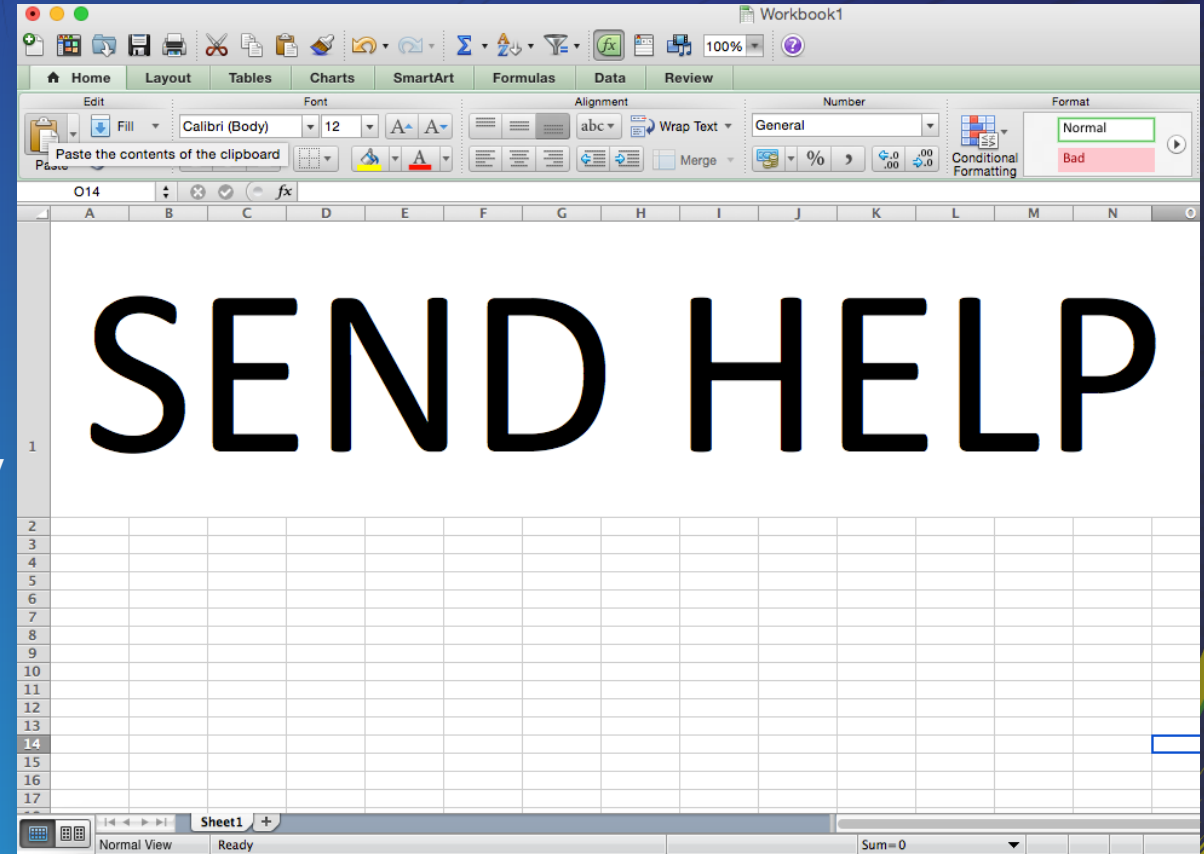
Tip #4

Include End Users in Requirements Phase



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!



Minimize required fields on a form

- Business Rules

The screenshot displays the Power Apps interface for configuring a Business Rule. The rule is named "Account: New business rule". It consists of a condition "New Condition" and two actions, both labeled "Set Business Required New Action". A text view of the rule shows the following logic:

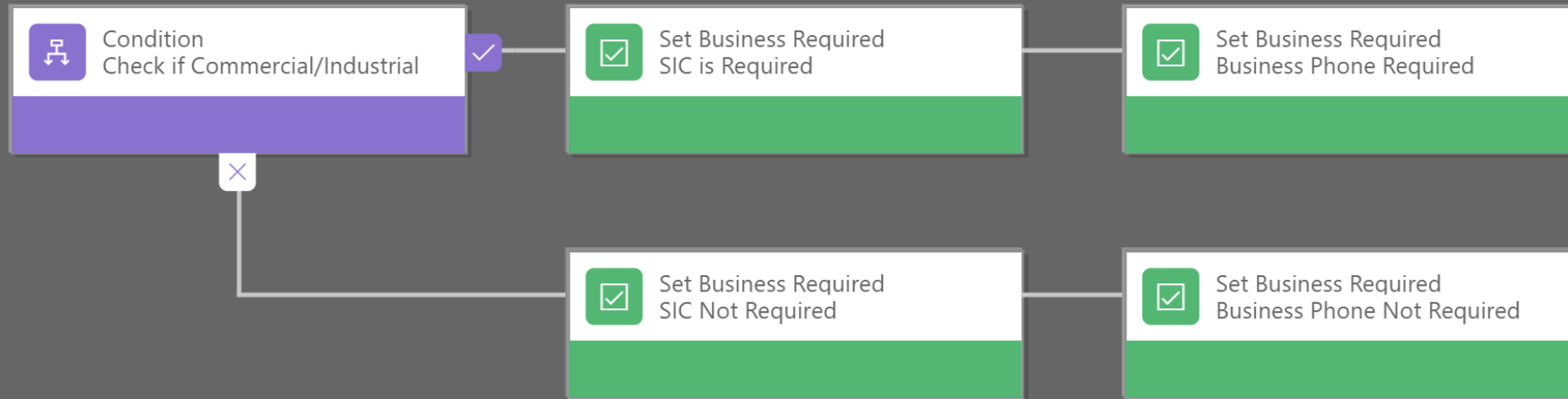
```
IF Address 1: City contains data
THEN Set Address 1: State/Province as Business Required
ELSE Set Address 1: State/Province as Not Business Required
```

The Properties pane on the right shows the following settings:

- Display Name: New Action
- Entity: Account
- Business Required: Address 1: State/Province (Field), Not Business Required (Status)

Buttons for "Apply" and "Discard" are visible at the bottom of the Properties pane.

Tip #7



Components Properties

Search components...

Flow

- Condition

Actions

- Recommendation
- Lock/Unlock
- Show Error Message
- Set Field Value
- Set Default Value
- Set Business Required

Business Rules: Set Required

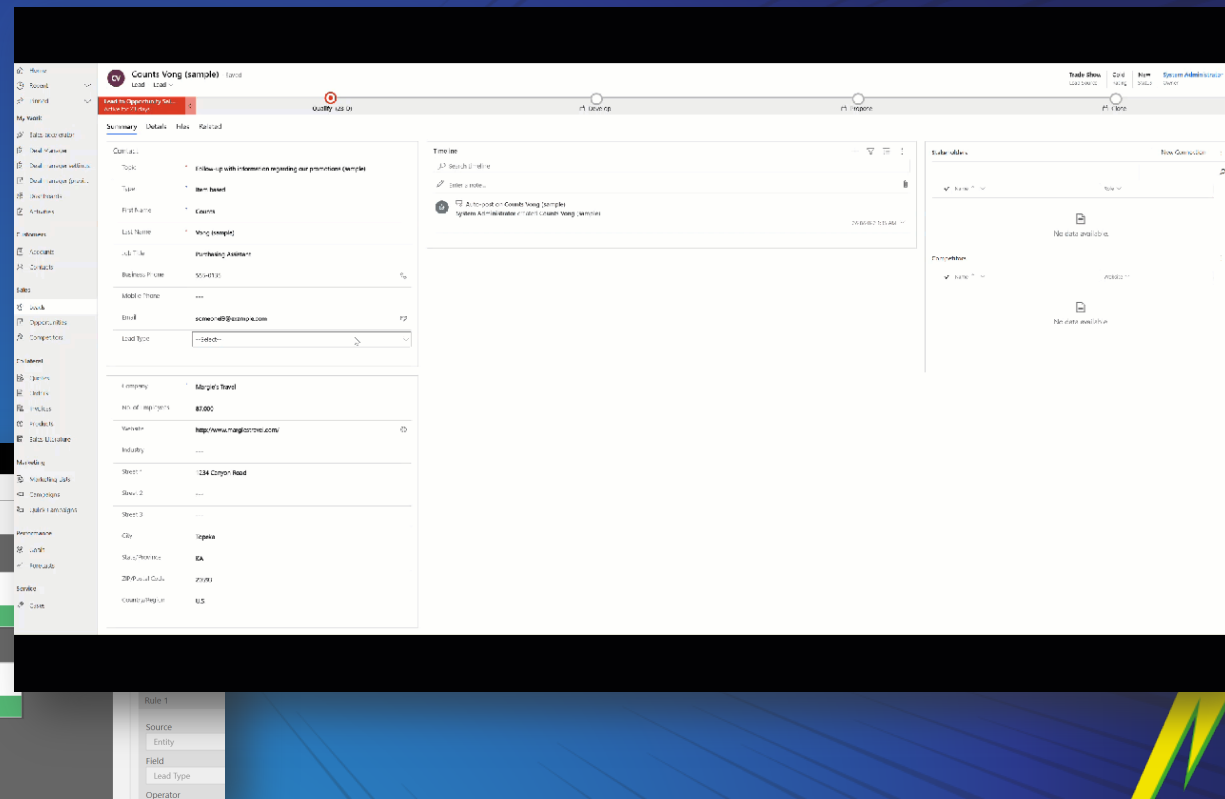
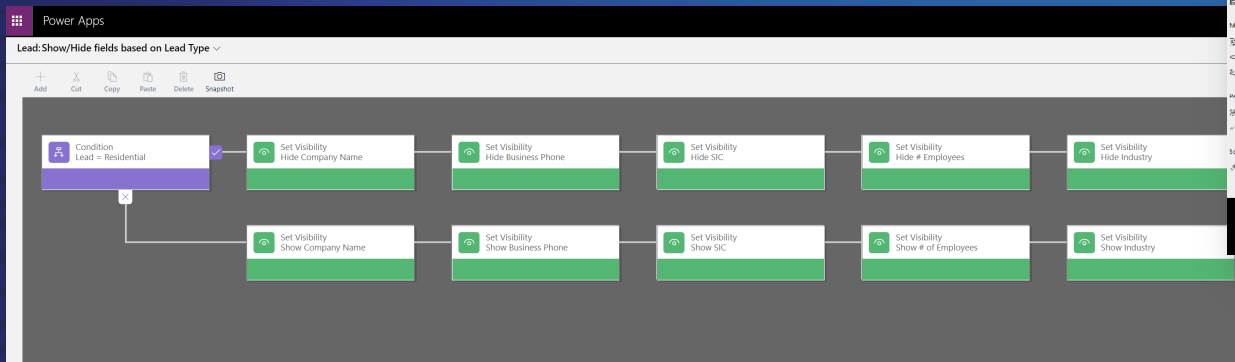
- Use case:

- 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.

Business Rule : Set Visibility

Example:

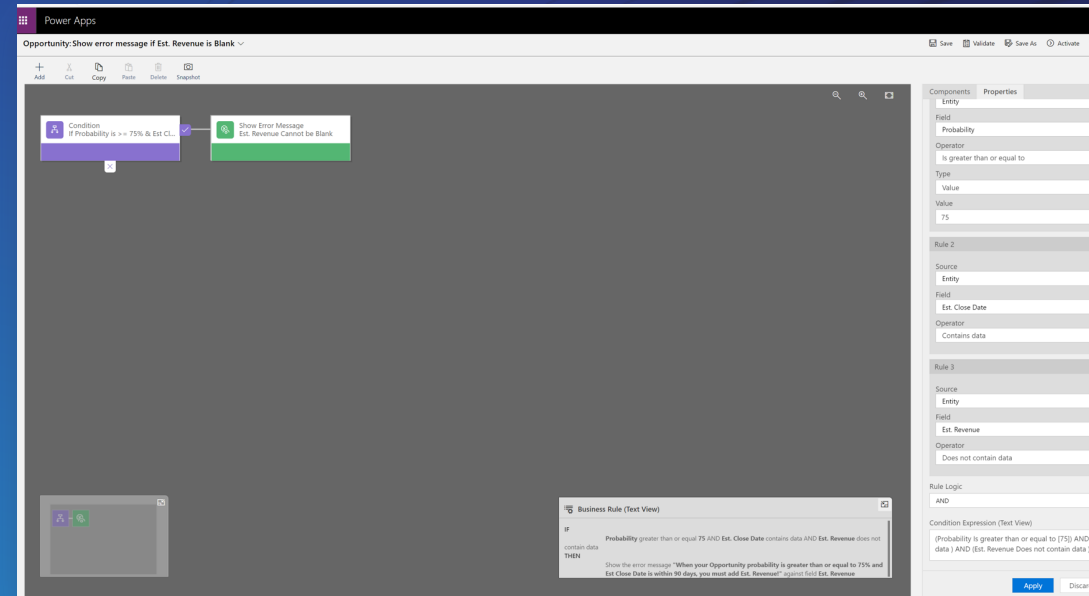
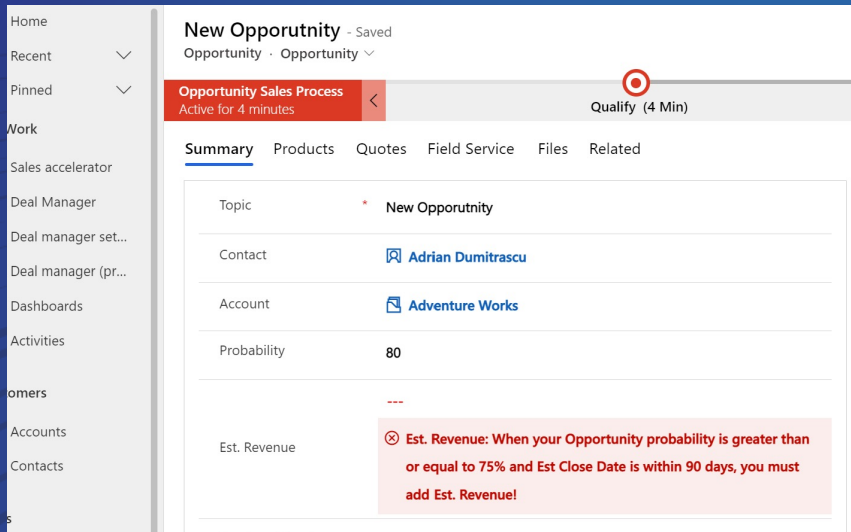
If a Lead is Residential, hide SIC Code, Industry, No. of Employees, Company Name and Business Phone fields.



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.



Business Rule: Add Recommendation

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

Address 1: Country/Region	USA
Recommendation	Shipping Method for USA When an Account is located in the USA, you should set Shipping Method to be UPS. Apply

The screenshot shows the 'Account: Add recommendation for USA Accounts' configuration window. It features a visual flow where a condition 'If Country = USA' is linked to a recommendation 'Set Shipping Method for USA'. The recommendation details show one action: 'Set Shipping Method as UPS'. A 'Business Rule (Text View)' pane displays the logic: 'IF Address 1: Country/Region equals "USA" THEN Show Recommendation "Set Shipping Method for USA" on Shipping Method Recommendation Title "Shipping Method for USA"'. The right-hand 'Properties' pane shows the 'Display Name' as 'Set Shipping Method as U...', the 'Entity' as 'Account', and the 'Field Value' for 'Address 1: Shipping M...' set to 'UPS'. Buttons for 'Apply' and 'Disca...' are visible at the bottom right.

Pick the right column (field) type

My New Column

Text

Text Area

Email

URL

Ticker Symbol

Phone

Autonumber

Whole Number

Whole Number

Duration

Timezone

Language

Date Time

Date and Time

Display name *

My New Column

Name * ⓘ

ren_ MyNewColumn

Data type * ⓘ

Text

Required * ⓘ

Optional

Searchable ⓘ

Calculated or Rollup ⓘ + Add

Description ⓘ

- 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!

Use tooltips on columns (fields)

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

ACCOUNT INFORMATION

Account Name *	A. Datum Corporation
Phone	425-555-0158
Fax	425-555-0159
Website	http://www.adatum.com/
Parent Account	---
Ticker Symbol	---

Website - This is the column description. Put a tool tip here!

Edit column
Previously called fields. [Learn more](#)

Display name *
Website

Description ⓘ
This is the column description. Put a tool tip here!

Data type * ⓘ
Single line of text

Format *
URL

Behavior ⓘ
Simple

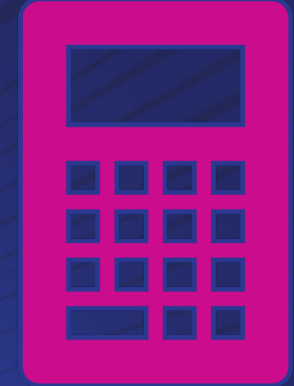
Required ⓘ
Optional

Searchable ⓘ

Advanced options ▾

Save Cancel

Use Calculated Fields



An Example:

Scenario:

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

- **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.**

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)**

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.

ROLLUP FIELD

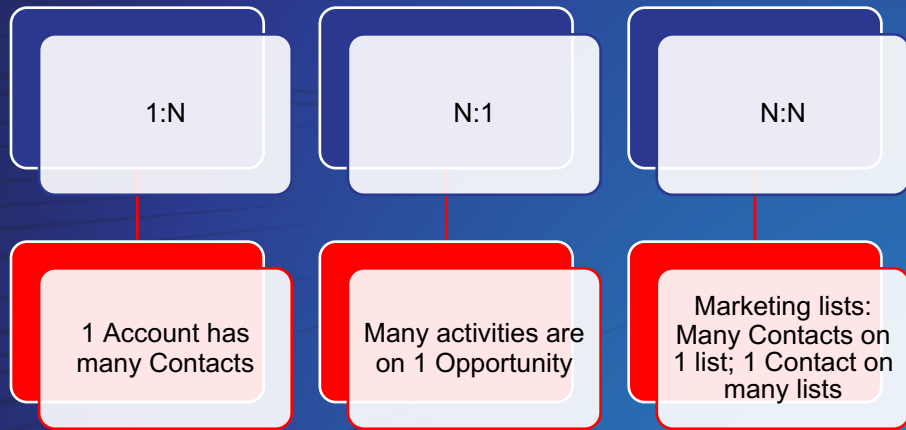
Total Opportunities

- ▲ SOURCE ENTITY
 - Source: **Account**
 - Use Hierarchy: **NO**
- ▲ RELATED ENTITY
 - Related: **Opportunities (Account)**
- ▲ FILTERS (OPTIONAL)
 - + Add condition
- ▲ AGGREGATION
 - COUNT** of **Opportunity**



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:

One-to-many

Choose the **Related table** from which to create your relationship lookup. Learn more

Current (One)	Related (Many)
Table * Account	Table * Contact

Lookup column display name *
Company Name

Lookup column name *
parentcustomerid

General

Relationship name *
contact_customer_accounts

Lookup column description
Select the parent account or parent contact for the contact to provide a quick link to additional details, such as financial information, activities, and opportunities.

Advanced options

Type of behavior *
System

Delete *
Cascade All

Assign *
Cascade All

Share *
Cascade All

Unshare *
Cascade All

Classic:

Relationship

Working on solution: solution file

Account to Contact

Common

- Information
- Mappings

General

Relationship Definition

Primary Entity *
Account

Related Entity *
Contact

Name *
contact_customer_accounts

Searchable
Yes

Hierarchical
No

Lookup Field

Display Name *
Company Name

Name *
parentcustomerid

Field Requirement *
Optional

Description
Select the parent account or parent contact for the contact to provide a quick link to additional details, such as financial information, activities, and opportunities.

Navigation Pane Item for Primary Entity

Display Option *
Use Plural Na

Custom Label *

Display Area
Details

Display Order *
50

Relationship Behavior

Type of Behavior *
Parental

Assign *
Cascade All

Reparent *
Cascade All

Share *
Cascade All

Delete *
Cascade All

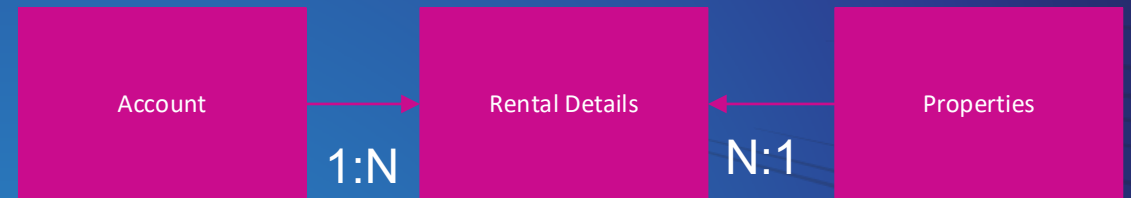
Unshare *
Cascade All

Merge *
Cascade All

Rollup View *
Cascade Non

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

Create Field Mapping From Lead to Opportunity
Create field mapping.

Source Entity Fields			Target Entity Fields		
Name ↑	Display Name...	Type (Size)	Name ↑	Display Name...	Type (Size)
qualifyingopportunityid	Qualifying O...	Lookup	proposedsolution	Proposed Sol...	Multiple Lines of Te
relatedobjectid	Related Cam...	Lookup	pursuitdecision	Decide Go/N...	Two Options
<input checked="" type="checkbox"/> ren_leadtype	Lead Type	Option Set	quotecomments	Quote Comm...	Multiple Lines of Te
revenue	Annual Reven...	Currency	<input checked="" type="checkbox"/> ren_opportunitytype	Opportunity ...	Option Set
revenue_base	Annual Reven...	Currency	resolvefeedback	Feedback Res...	Two Options
salesstage	Sales Stage	Option Set	salesstage	Sales Stage	Option Set

1 - 149 of 149 (1 selected) | 1 - 62 of 62 (1 selected)

Help | OK | Cancel

Switch to Classic!!!

Power Apps

File | Save and Close | Show Dependencies | Solution Layers | Managed Properties

Relationship | Working on solution: D365UG

Lead to Opportunity

Common | Information | Mappings

General

Relationship Definition

Primary Entity * | Lead | Related Entity * | Opportunity

Name * | opportunity_originating_lead

Searchable | Yes

Hierarchical | No

Lookup Field

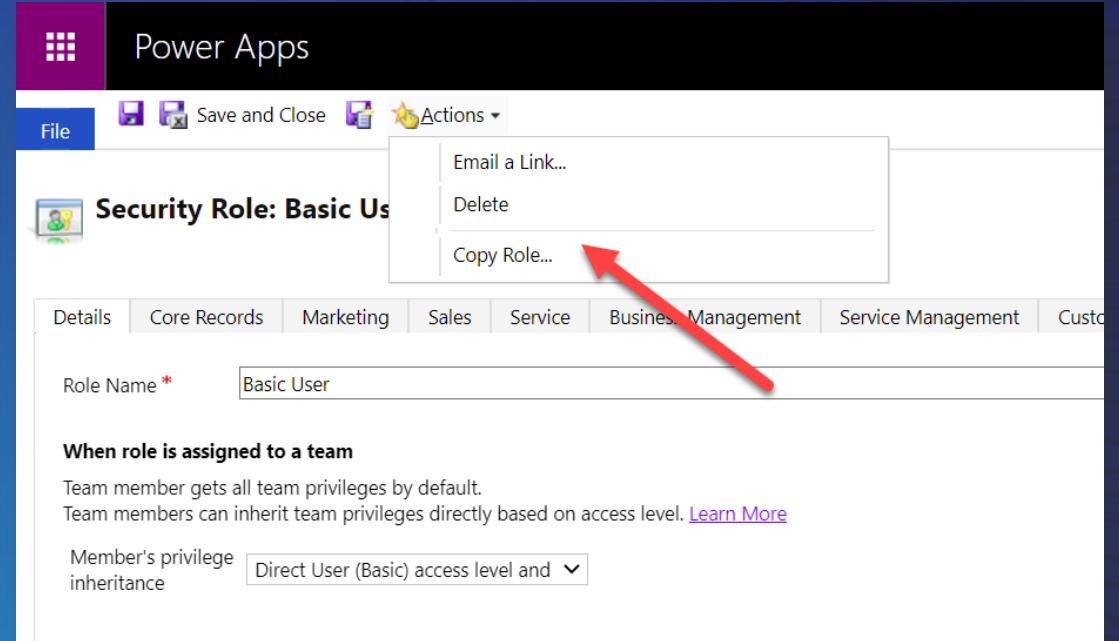
Display Name * | Originating Lead | Name * | originatingleadid

Field Requirement * | Optional

Description | Choose the lead that the opportunity was created from for reporting and analytics. The field is read-only after the opportunity is created and defaults to the correct lead when an opportunity is created from a converted lead.

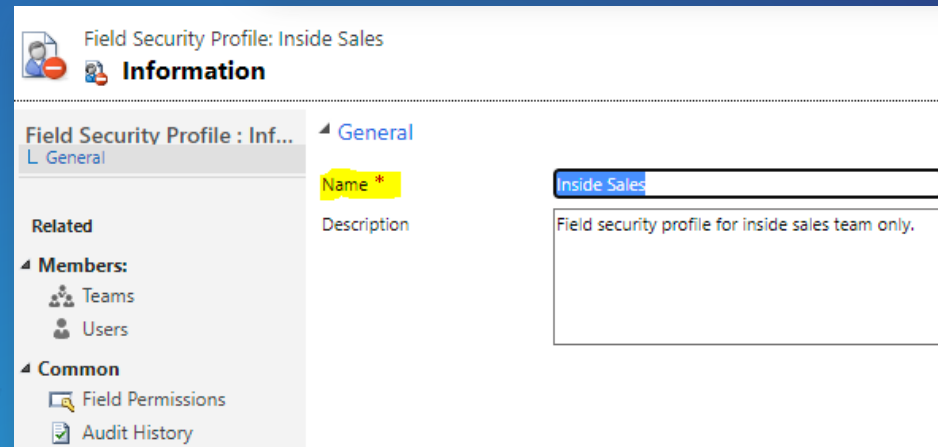
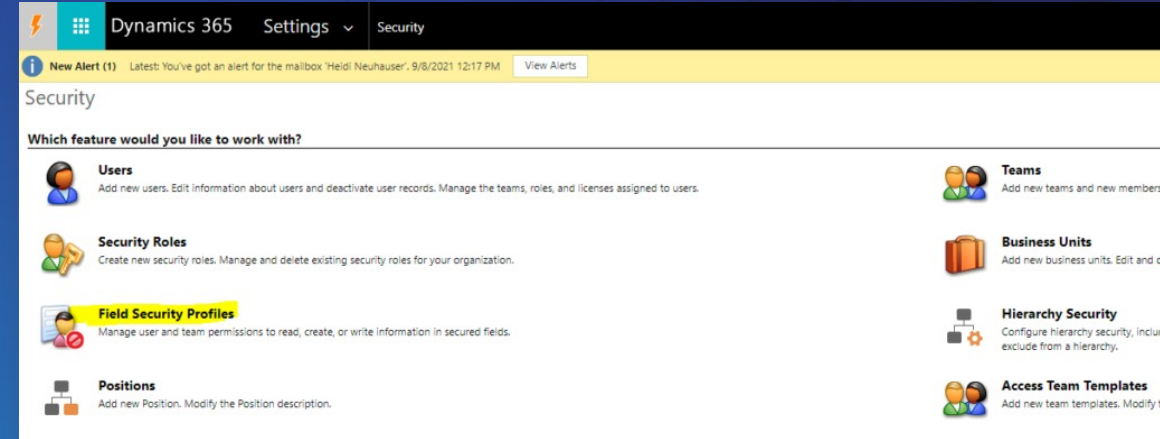
Don't Use Out-of-the-box Security Roles

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



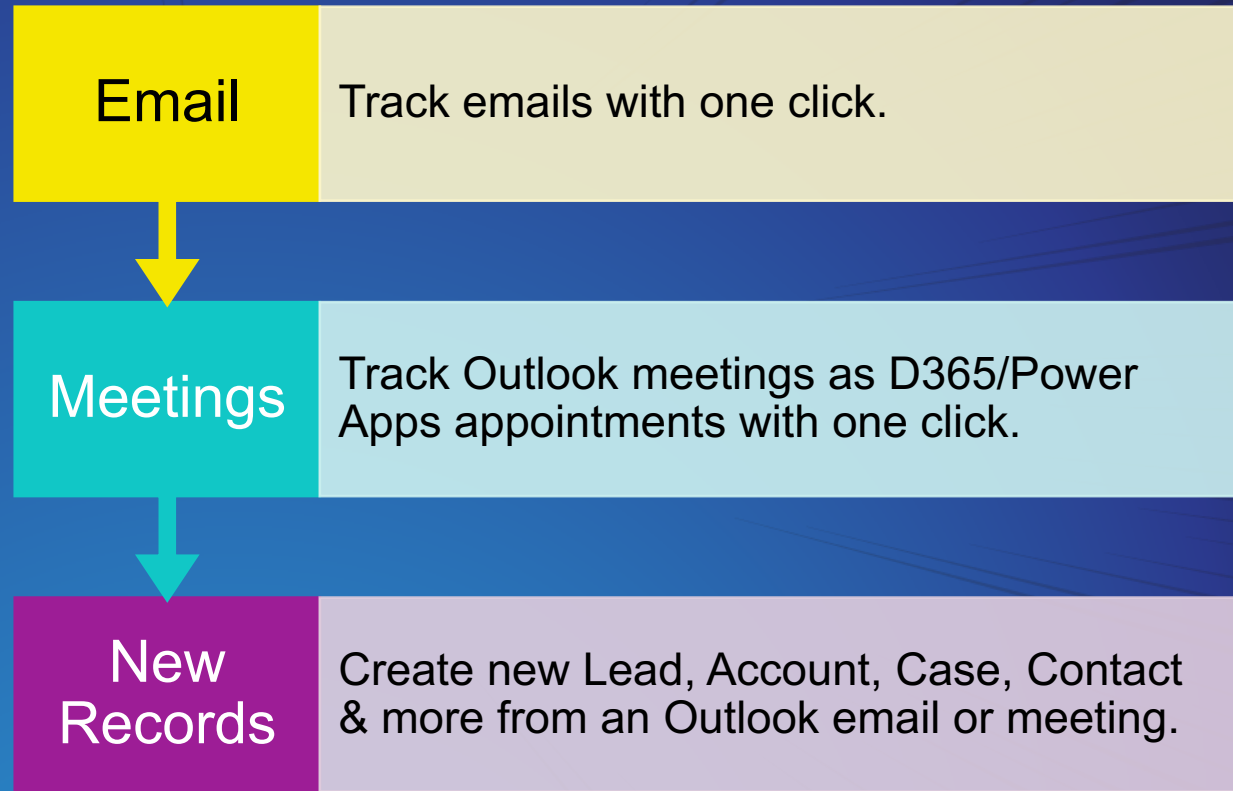
Field Security Profiles lock down specific column access for specific users

- 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.



Configure the Dynamics 365 App for Outlook

Power Apps + Outlook =

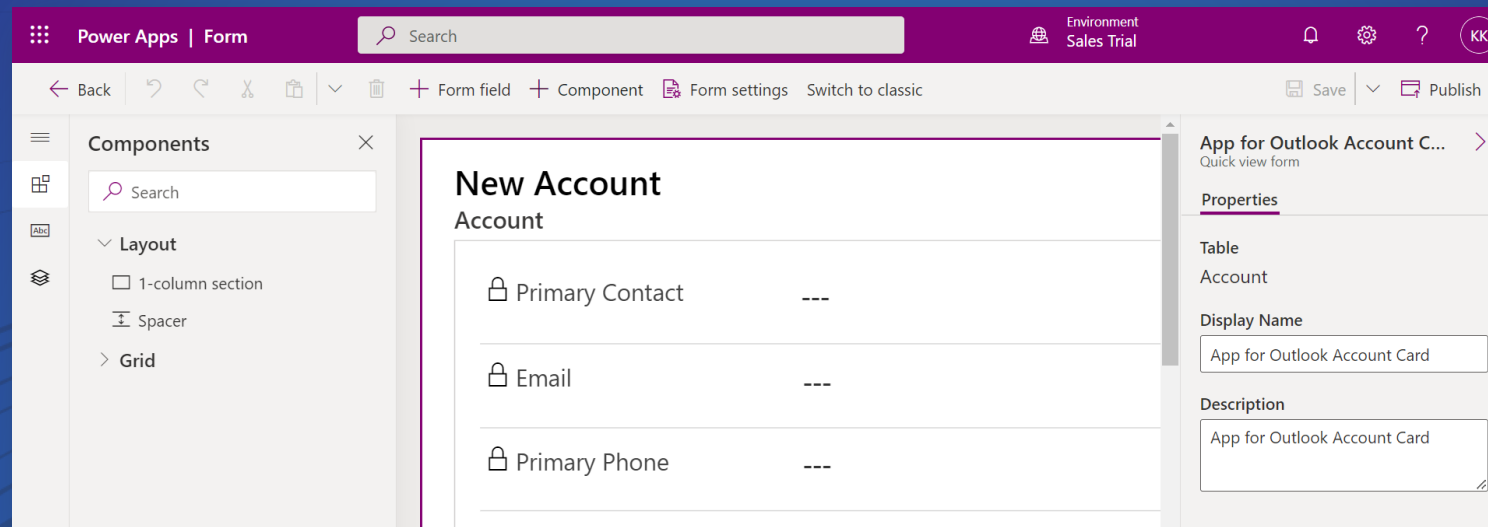


But... keep an eye on **Viva for Sales** in this space too. 🤔



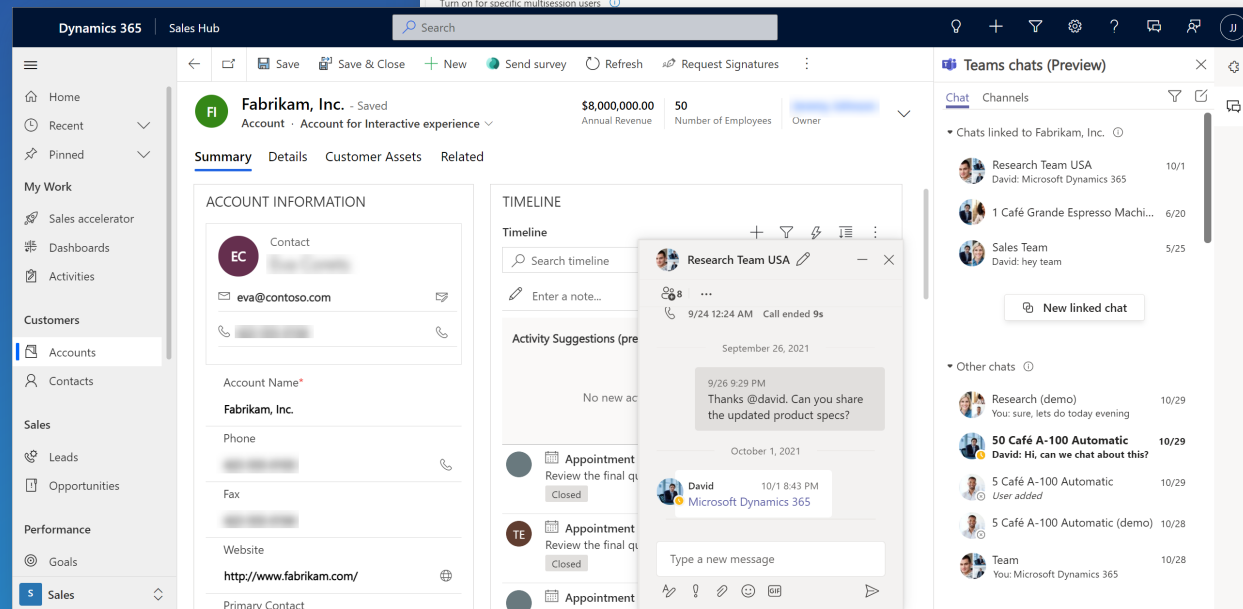
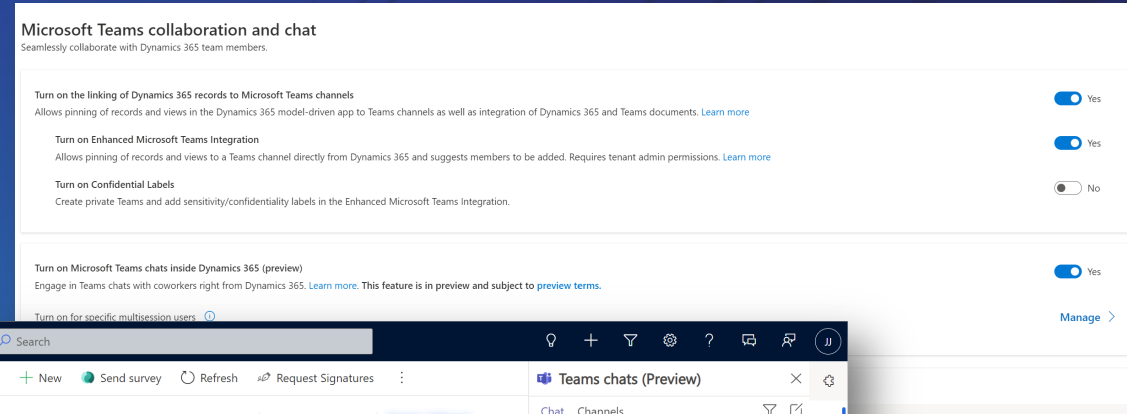
Customize Forms in App for Outlook

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

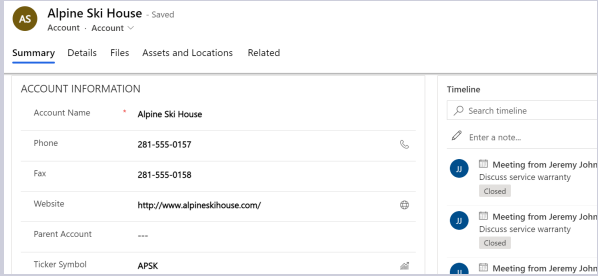
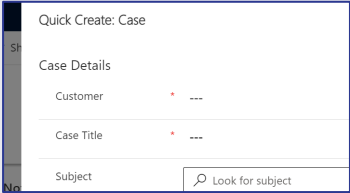
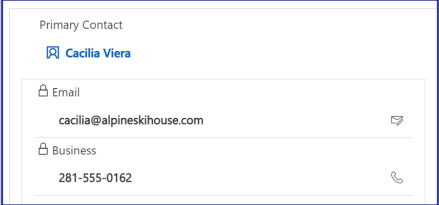
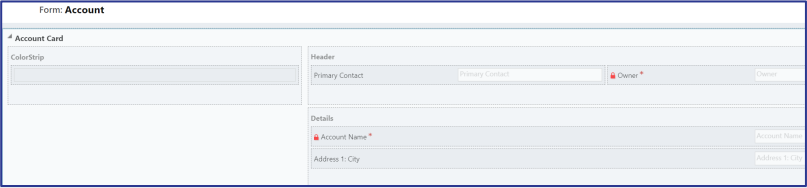


Set Up Microsoft Teams Integration

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



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)

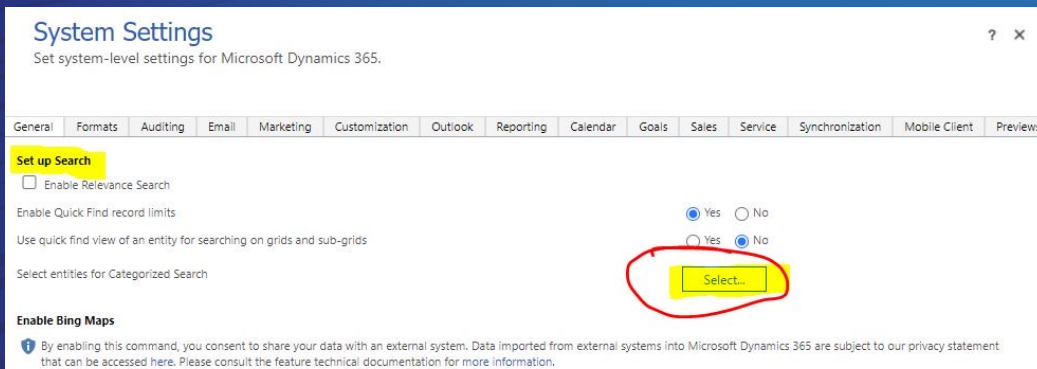
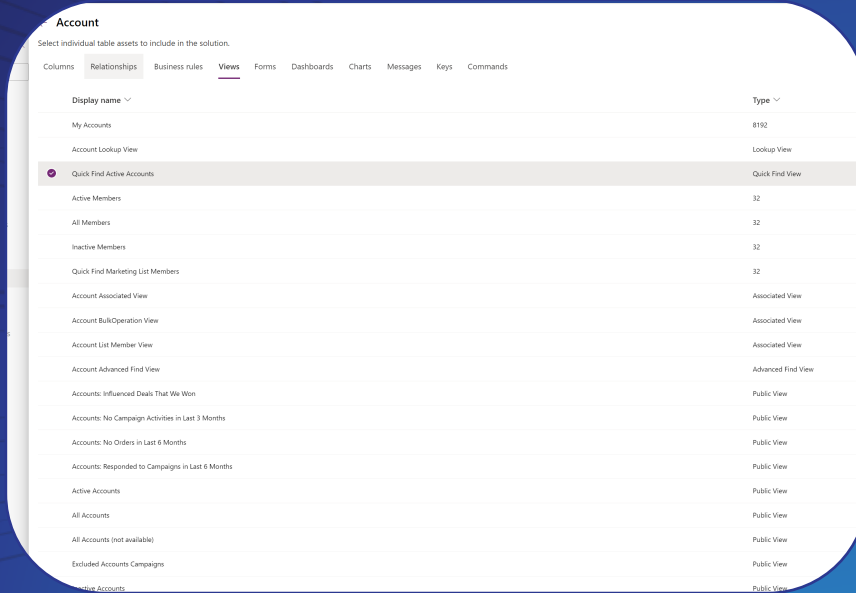
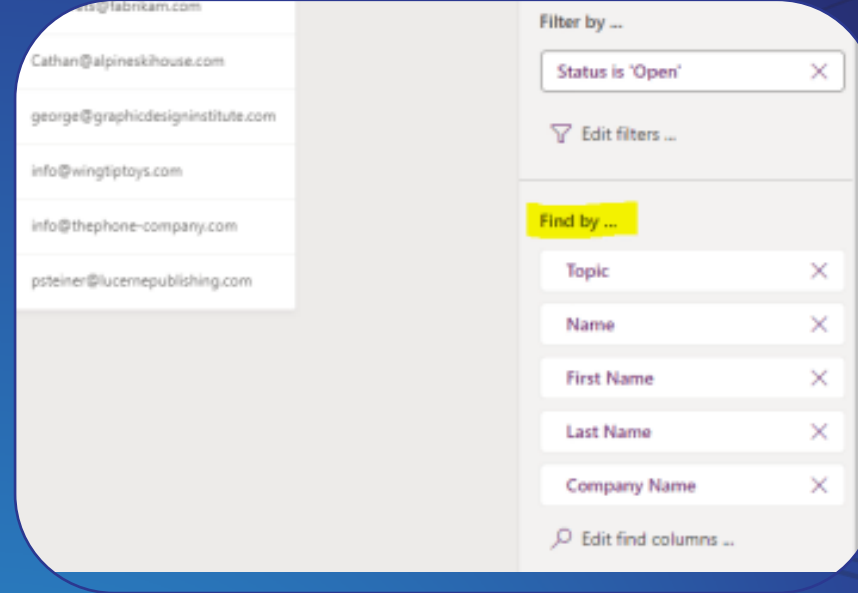


Table (Entity) Search



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



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

Tip #26



RSS



SQL Server

PREMIUM



Power BI



Azure DevOps

PREMIUM



OneNote (Busi...



Notifications



Office 365 Users



Google Calendar



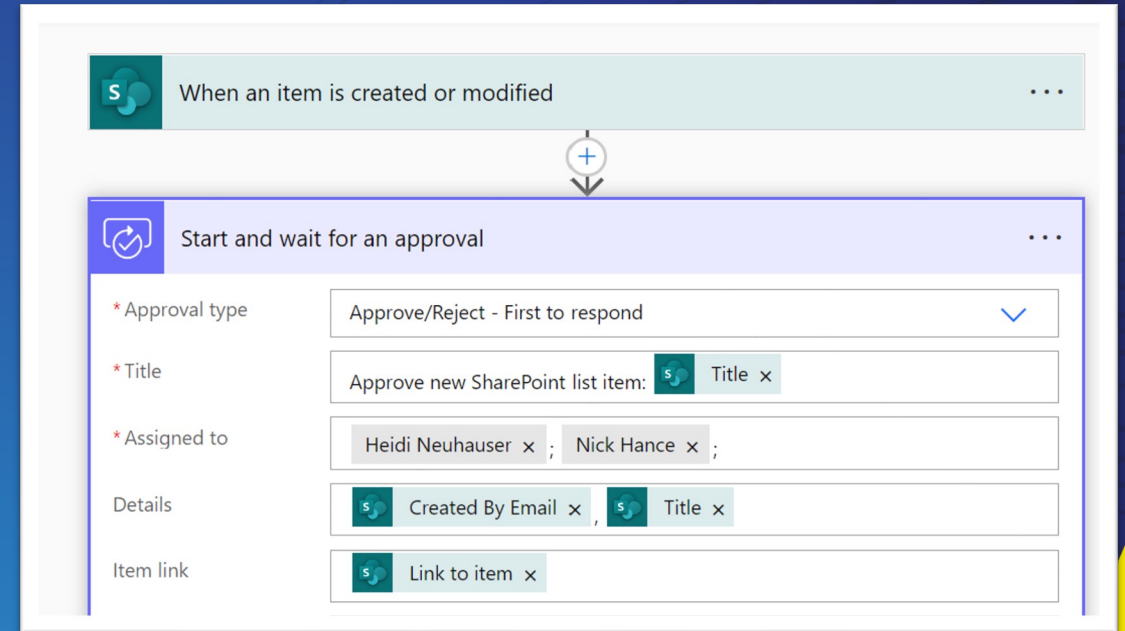
Automate Manual Tasks with Power Automate

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



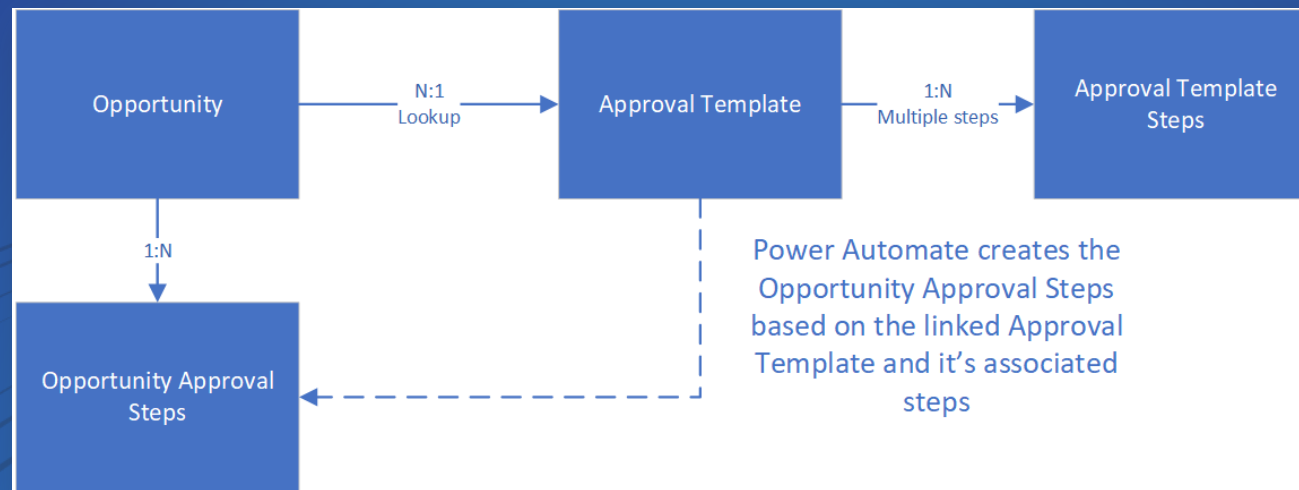
Power Automate Approvals

- 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



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

- Live training
- Graphs
- Diagrams
- Flow charts
- Demo
- Webinar

Aural Learners

- Live training
- Lecture
- Discussion Groups
- Webinar
- Videos
- Podcasts

Reading & Writing Learners

- Live training
- PowerPoint
- Quick Reference Guides
- Job Aids
- Labs
- Handouts

Kinesthetic Learners

- 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


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!

When role is assigned to a team

Team member gets all team privileges by default.
Team members can inherit team privileges directly based on access level. [Learn More](#)

Member's privilege inheritance

Direct User (Basic) access level and 

Team privileges only

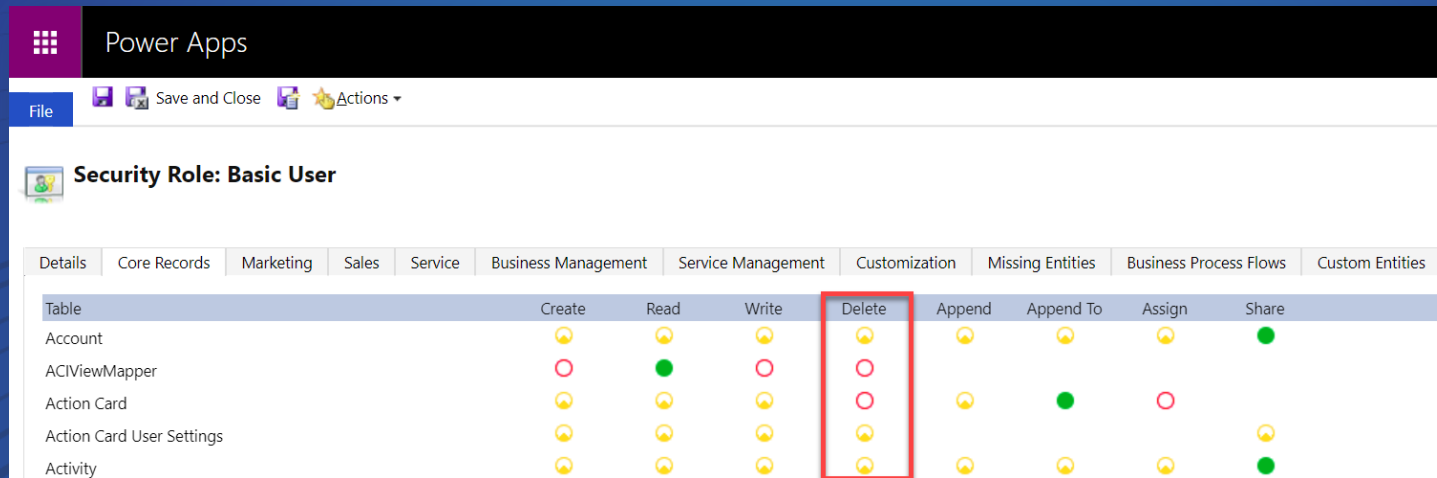
Direct User (Basic) access level and Team privileges

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

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!



The screenshot shows the 'Security Role: Basic User' configuration page in Power Apps. It features a table with columns for various permissions: Create, Read, Write, Delete, Append, Append To, Assign, and Share. The 'Delete' column is highlighted with a red box. The rows represent different tables: Account, ACViewMapper, Action Card, Action Card User Settings, and Activity. The 'Delete' column contains icons representing the permission status for each table.

Table	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟢
ACViewMapper	🔴	🟢	🔴	🔴	🟡	🟢	🔴	
Action Card	🟡	🟡	🟡	🔴	🟡	🟢	🔴	
Action Card User Settings	🟡	🟡	🟡	🟡	🟡			🟡
Activity	🟡	🟡	🟡	🟡	🟡	🟡	🟡	🟢

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	●

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

Northwind Traders - Saved
Annual Revenue: \$6,800,000.00 | Number of Employees: 300 | Owner: Kylie K

Summary Details **Contacts** Files Assets and Locations Related

Contacts Editable Grid [Edit] [Activate]

Group By: (no grouping)

Full Name	Email	Company Name	Business Phone
Heriberto Nathan	heriberto@northwind...	Northwind Traders	614-555-0123
5 Café BG-1 Pro G...	Northwind...	heriberto...	Open
Miguel Garcia	miguel@northwindtra...	Northwind Traders	614-555-0127

Set Properties
Set the List or Chart properties.

Display Formatting Controls Events

Control Web Phone Tablet

Read-only Grid (default)

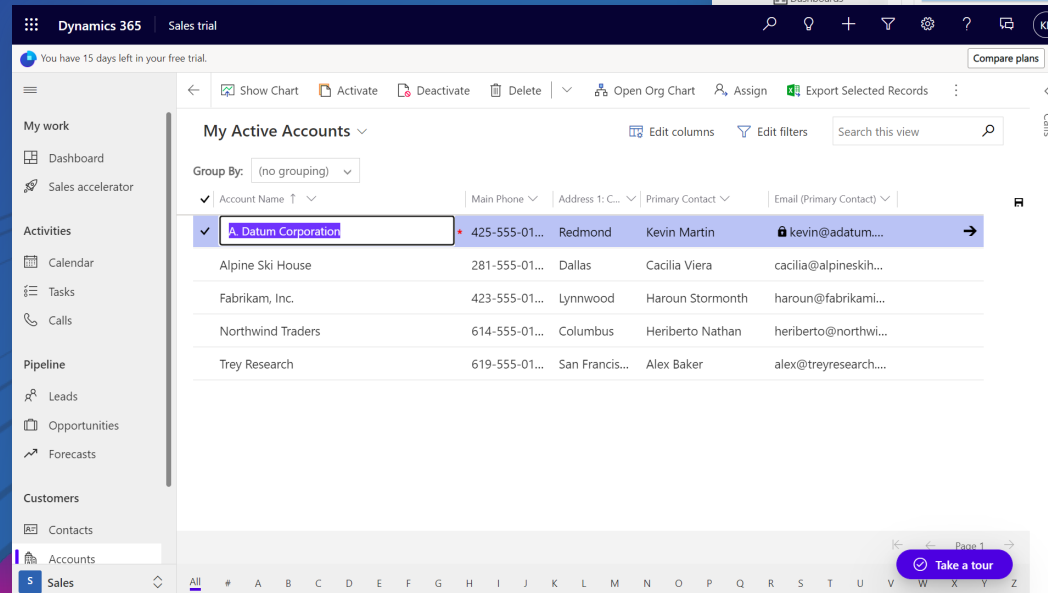
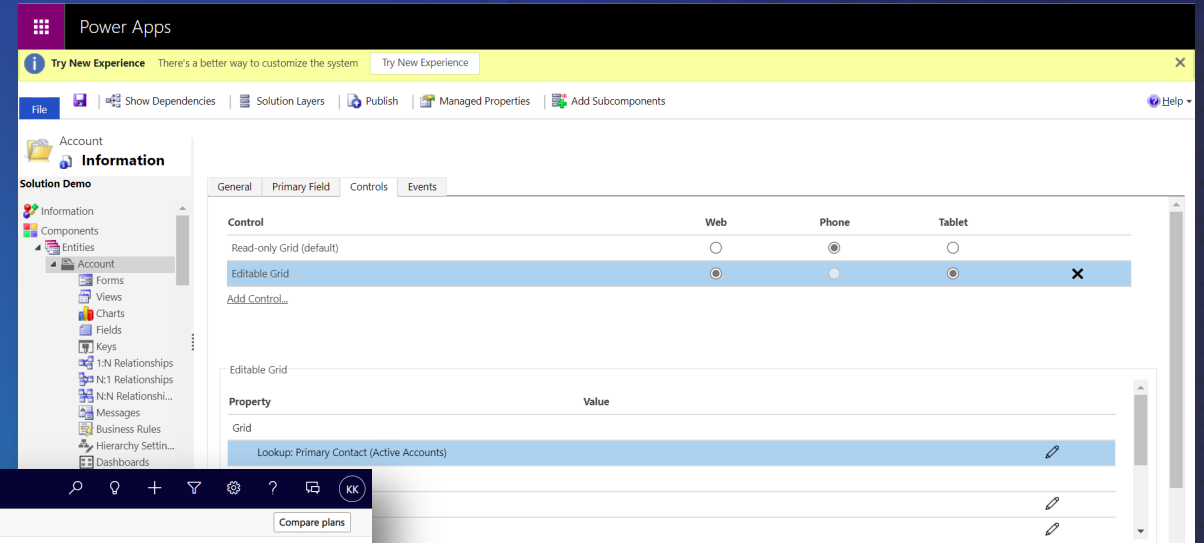
Editable Grid

Add Control

Property	Value
Grid	My Active Contacts
Add Lookup	
Subgrid	All Opportunities [Edit]
Subgrid parent id	parentcontactid (Lookup.Si... [Edit]

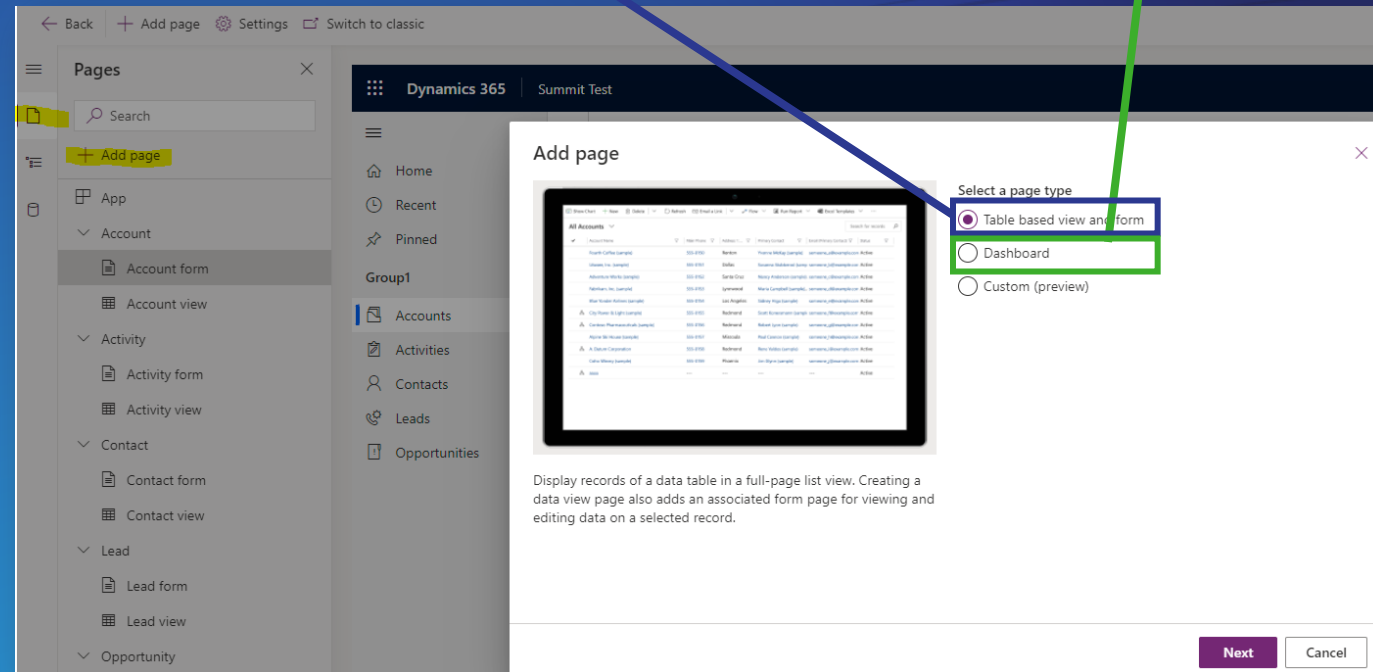
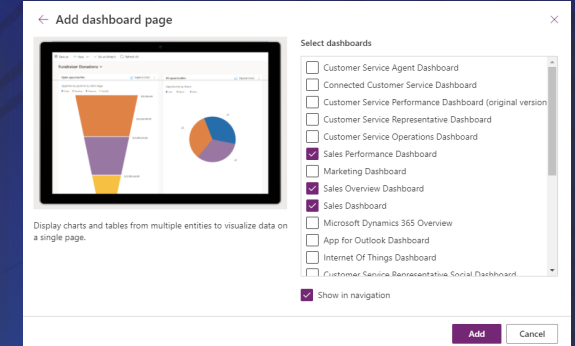
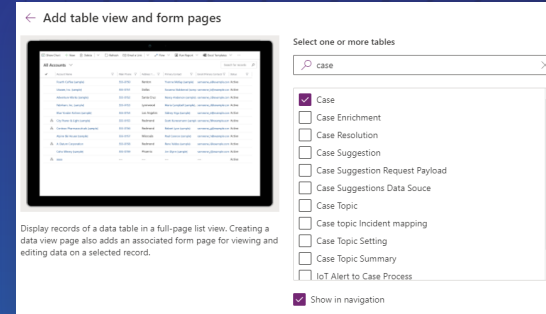
Editable Grid – Enable for a Table

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



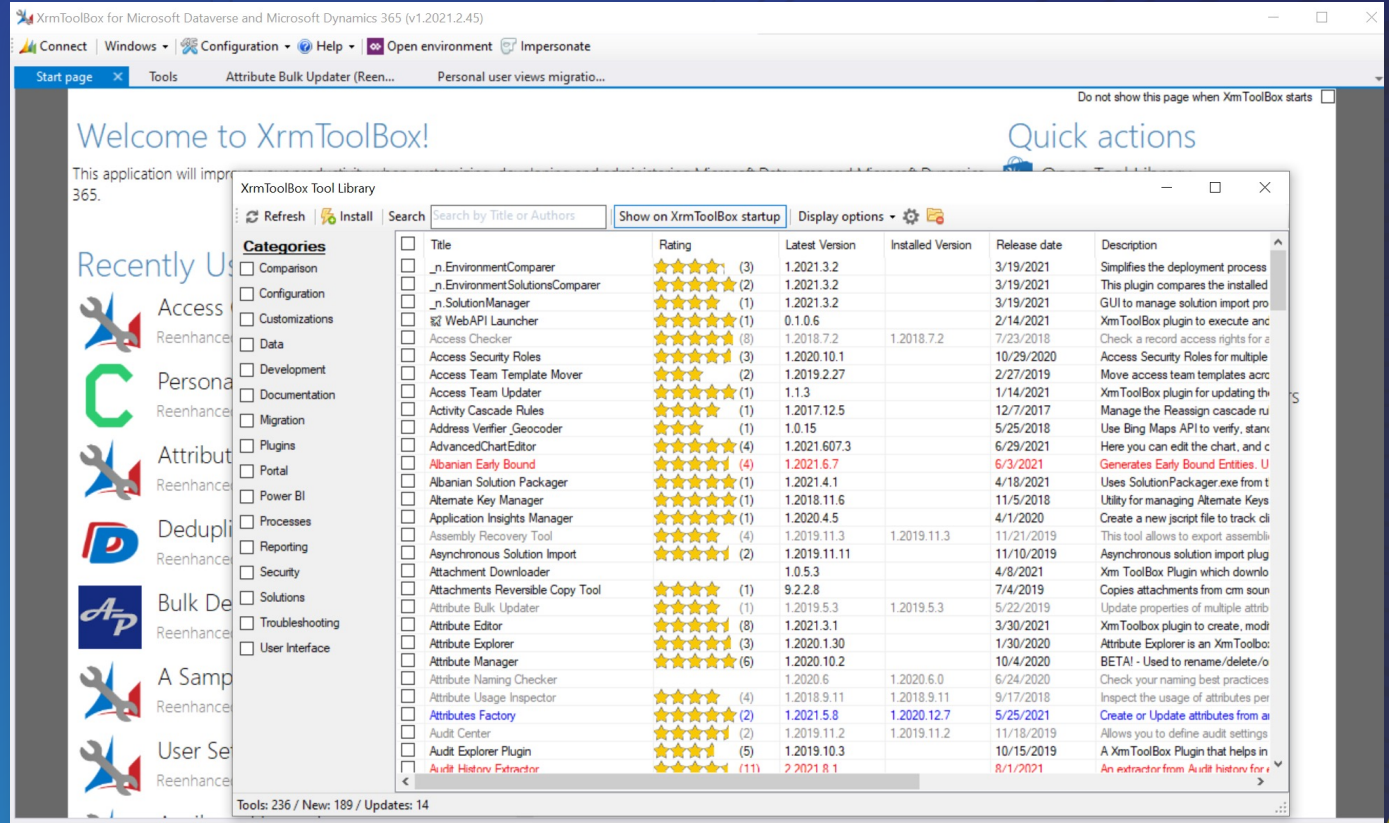
Add Pages to Enhance your App

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



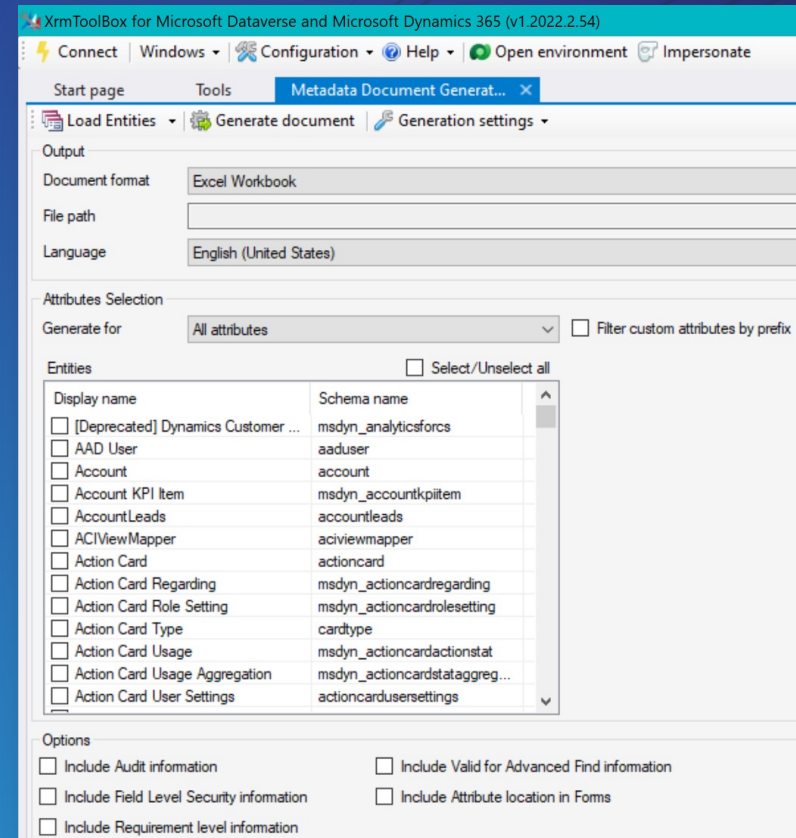
Use the XrmToolBox

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



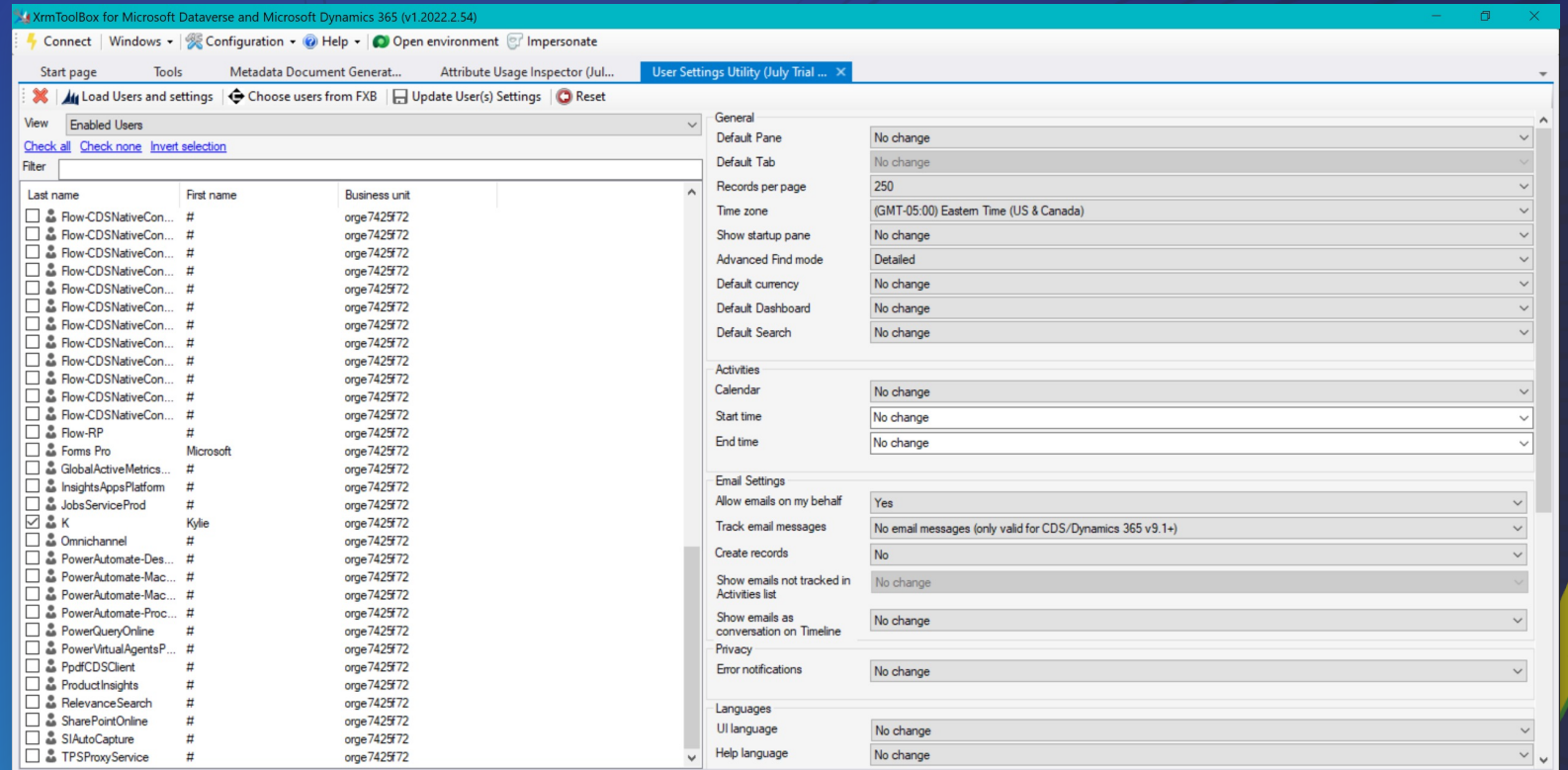
Documentation: Metadata Document Generator

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



Set User Settings for them

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



Tip #41

Try out AI capabilities for each data type

☆ All Documents Text Structured data Images

- Invoice processing: Extract information from invoices
- Text recognition: Extract all the text in photos and PDF documents (OCR)
- Receipt processing: Extract information from receipts
- Identity document reader: Extract information from identity documents
- Business card reader: Extract information from business cards
- Document processing (Custom model): Extract custom information from documents
- Sentiment analysis: Detect positive, negative, or neutral sentiment in text data
- Category classification (Preview): Classify customer feedback into predefined categories
- Entity extraction: Extract key elements from text, and classifies them into predefined categories
- Key phrase extraction: Extract most relevant words and phrases from text
- Language detection: Detect the predominant language of a text document
- Text translation: Detect and translate more than 90 supported languages
- Category classification (Custom model): Classify texts into custom categories
- Entity extraction (Custom model): Extract custom entities from your text
- Prediction (Custom model): Predict future outcomes from historical data
- Object detection (Custom model): Detect custom objects in images
- Image classification (Custom model, Lobe): Classify your images based on their content (powered by Lobe)

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

Embedded Canvas Apps

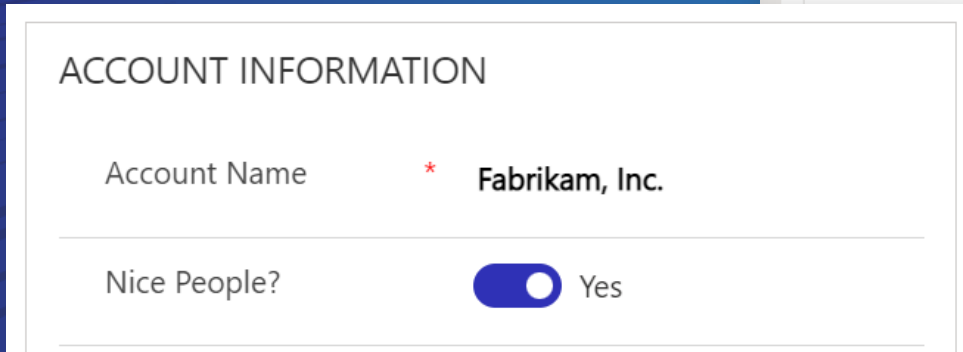
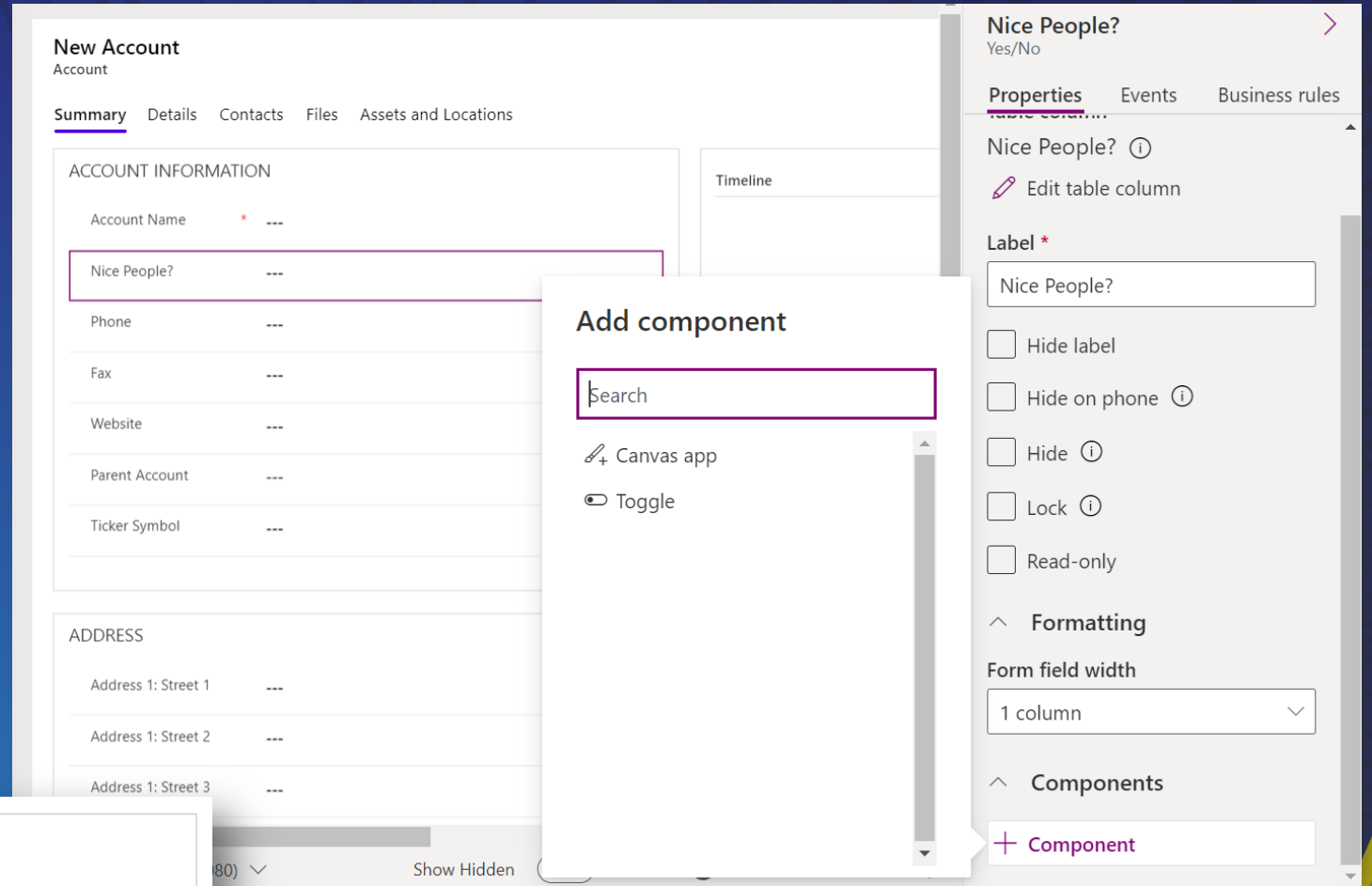
- Want more flexibility in your Model-Driven Apps? Create a Canvas App and embed it!

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)

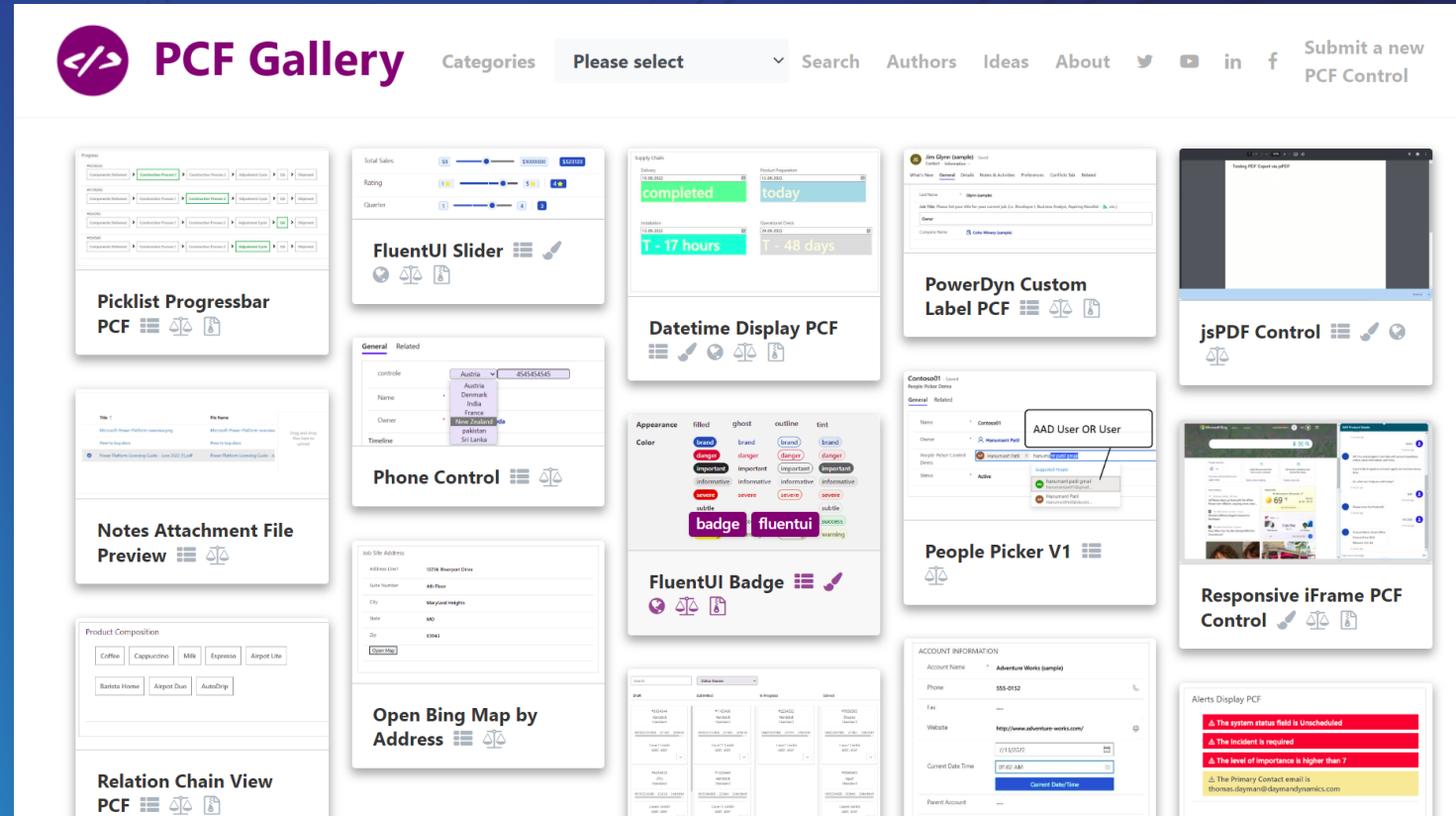
Use Controls

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



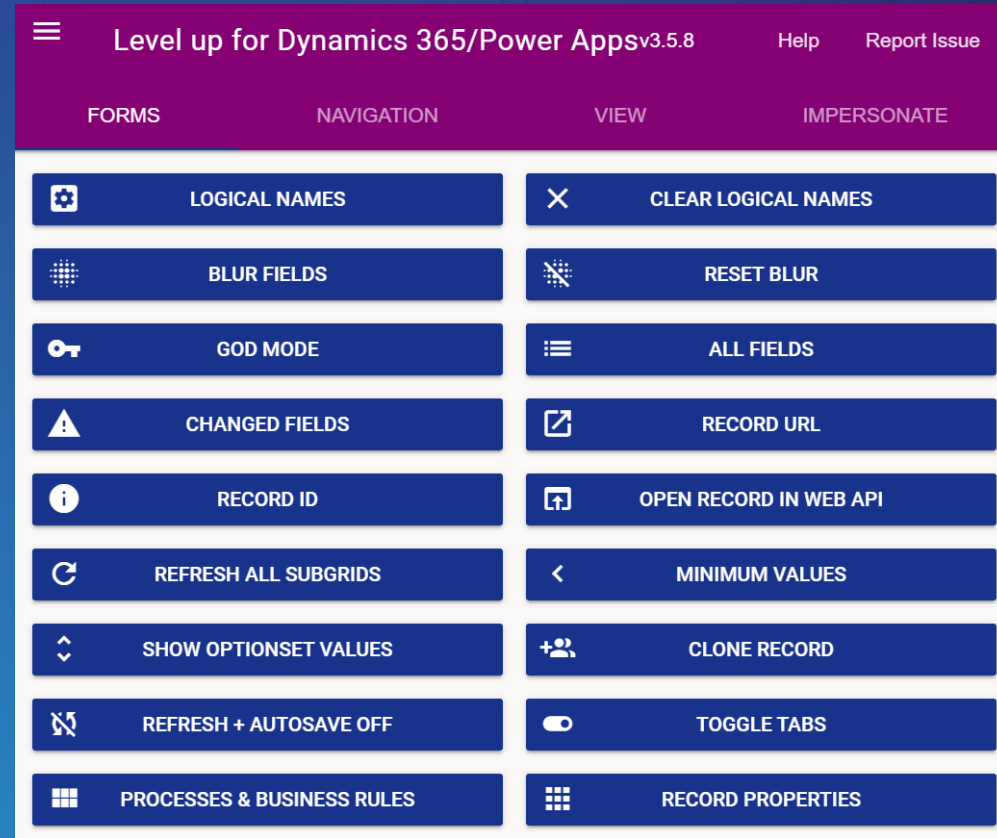
PCF Gallery

- 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



Level Up!

- Use Level Up to see logical column names, see hidden fields, impersonate users, etc.
- [Level Up Edge Extension](#)



Other Great Community Resources



[Local User Groups](#)



[Power Platform Weekly Newsletter](#)

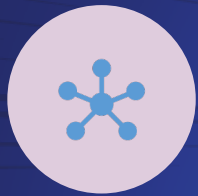


[PCF Gallery](#)



[Connector Review](#)

Microsoft Learn



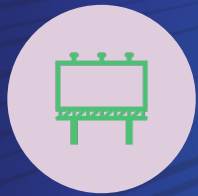
[Power Platform Fundamentals](#)



[D365 Fundamentals: Customer Service](#)



[D365 Fundamentals: Sales](#)



[D365 Fundamentals: Marketing](#)



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

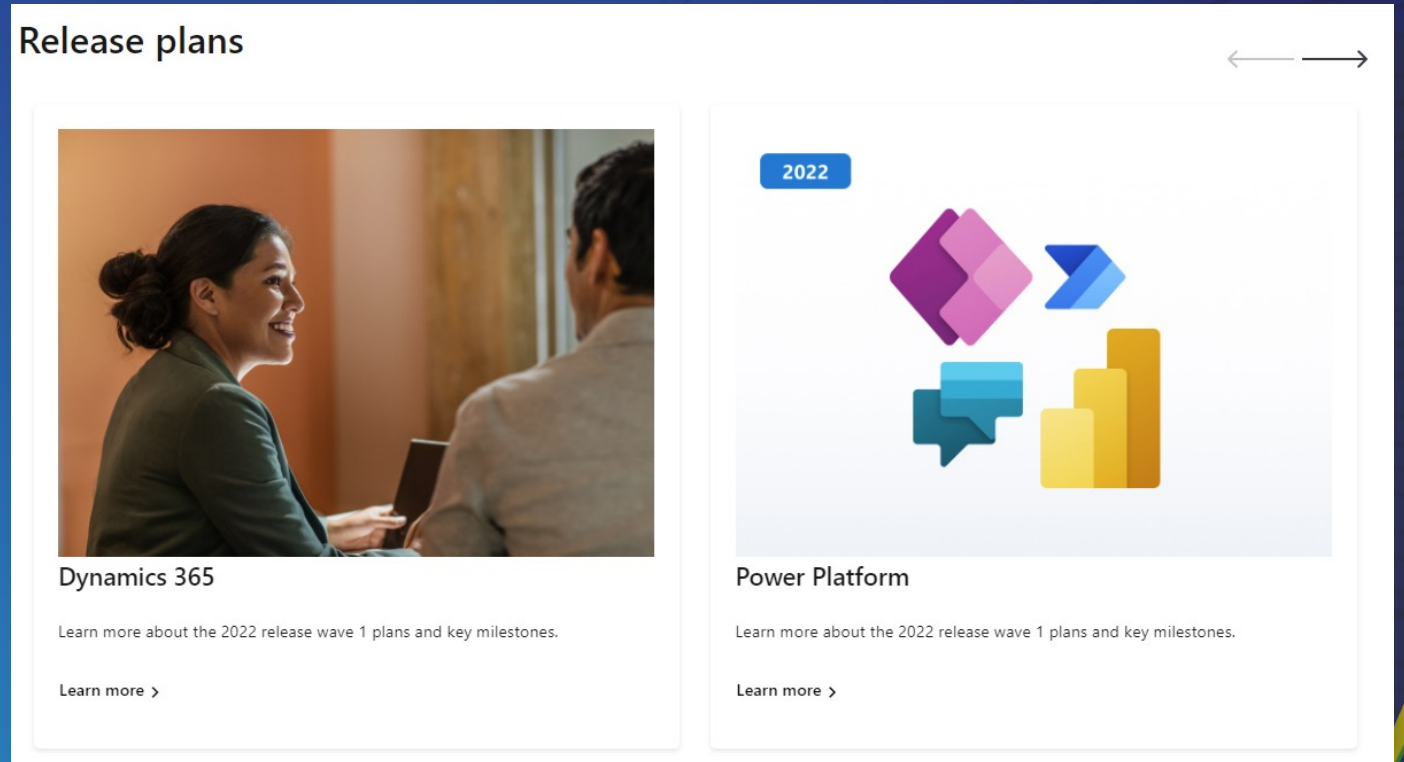


[Success by Design](#)

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](#)

Release plans



Dynamics 365

Learn more about the 2022 release wave 1 plans and key milestones.

[Learn more >](#)

Power Platform

Learn more about the 2022 release wave 1 plans and key milestones.

[Learn more >](#)

Final Tip! - #50

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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

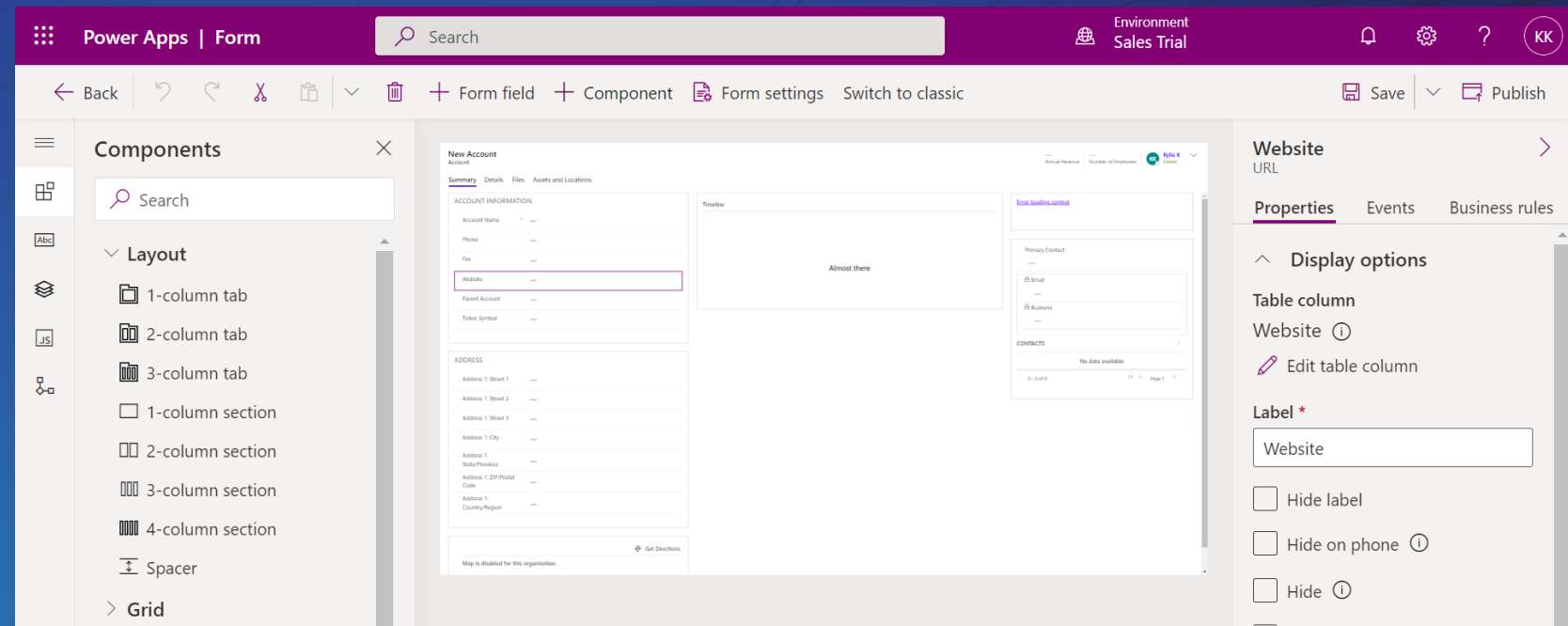
The screenshot displays a Microsoft Dynamics CRM record for a sales opportunity titled "5 Café BG-1 Pro Grinders for Northwind Traders". The record is in the "Qualify" stage of a sales process, which is active for 16 days. The opportunity details include an estimated close date of 7/30/2022, an estimated revenue of \$24,995.00, and a status of "In Progress". The owner is Kylie K. The interface shows a summary table with the following data:

Field	Value
Topic	5 Café BG-1 Pro Grinders for Northwind Traders
Contact	Heriberto N...
Account	Northwind Traders
Purchase Timeframe	Unknown
Currency	US
Budget Amount	---

The summary table also includes a checklist of tasks: "Identify Contact" (checked, assigned to Heriberto N...), "Identify Account" (checked, assigned to Northwind ...), "Purchase Timeframe" (checked, value: Unknown), "Estimated Budget" (value: ---), and "Purchase Process" (checked, value: Unknown). A "Next Stage" button is visible at the bottom of the summary pane. The right-hand pane shows a recent email from Jeremy Johnson regarding a warranty, dated 7/23/2022 1:00 PM, and a new pricing proposal with finance, dated 2022 9:30 AM, by Kylie K.

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!

The screenshot shows the configuration page for a Duplicate Detection Rule in Microsoft Dynamics CRM. The rule is titled "Accounts with the same Account Name" and is currently inactive. The configuration is as follows:

- Name:** Accounts with the same Account Name
- Status Reason:** Publishing
- Description:** Detects account records that have the same value in the Account Name attribute.
- Duplicate Detection Rule Criteria:**
 - Base Record Type:** Account
 - Matching Record Type:** Account
 - Case-sensitive:**
 - Exclude inactive matching records:**
- Criteria Table:**

Field	Criteria	No. of Characters	Ignore Blank Values
Account Name	Exact Match		<input type="checkbox"/>
Select			

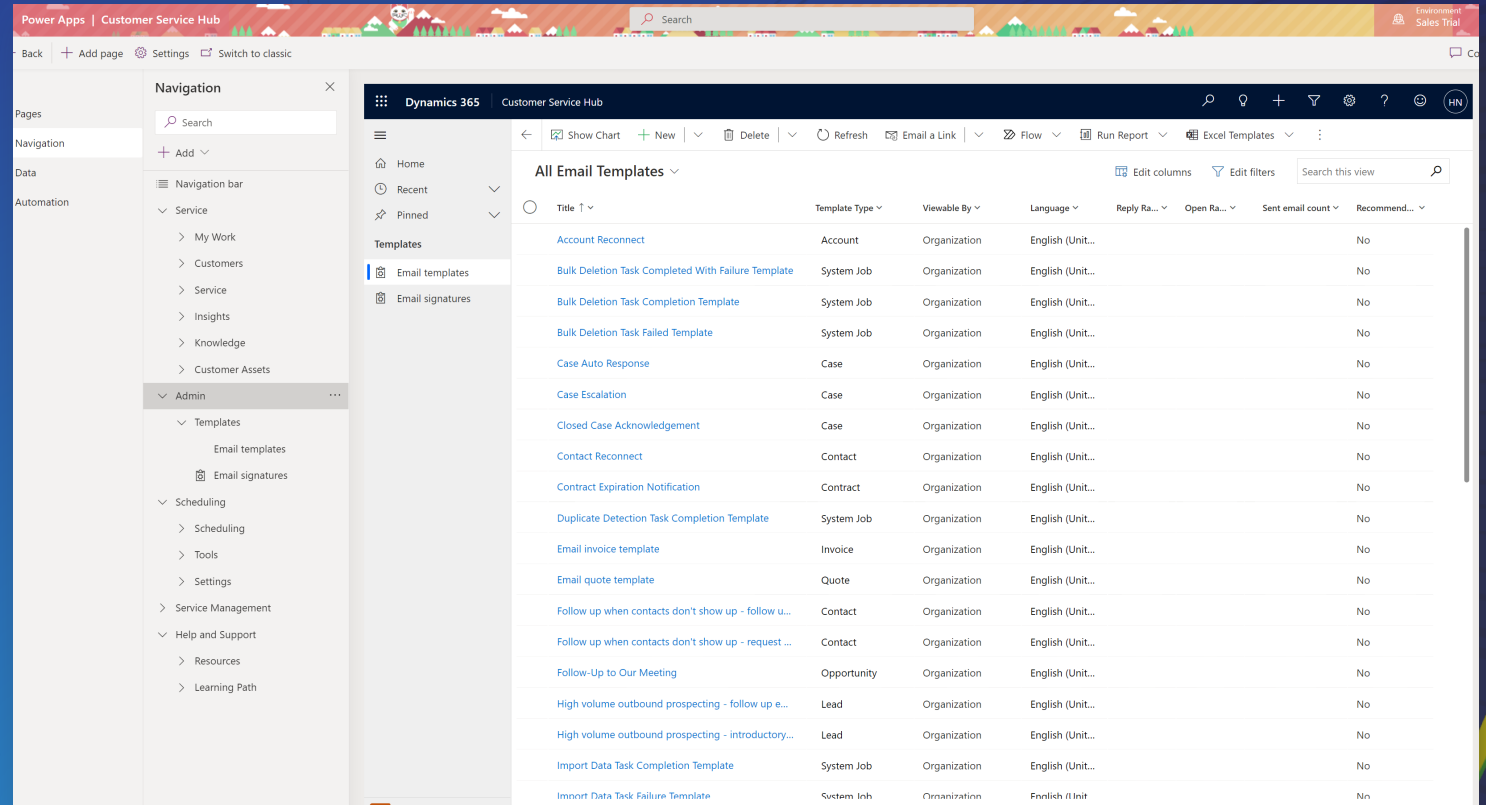
At the bottom left of the window, it says "Status: Inactive".

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

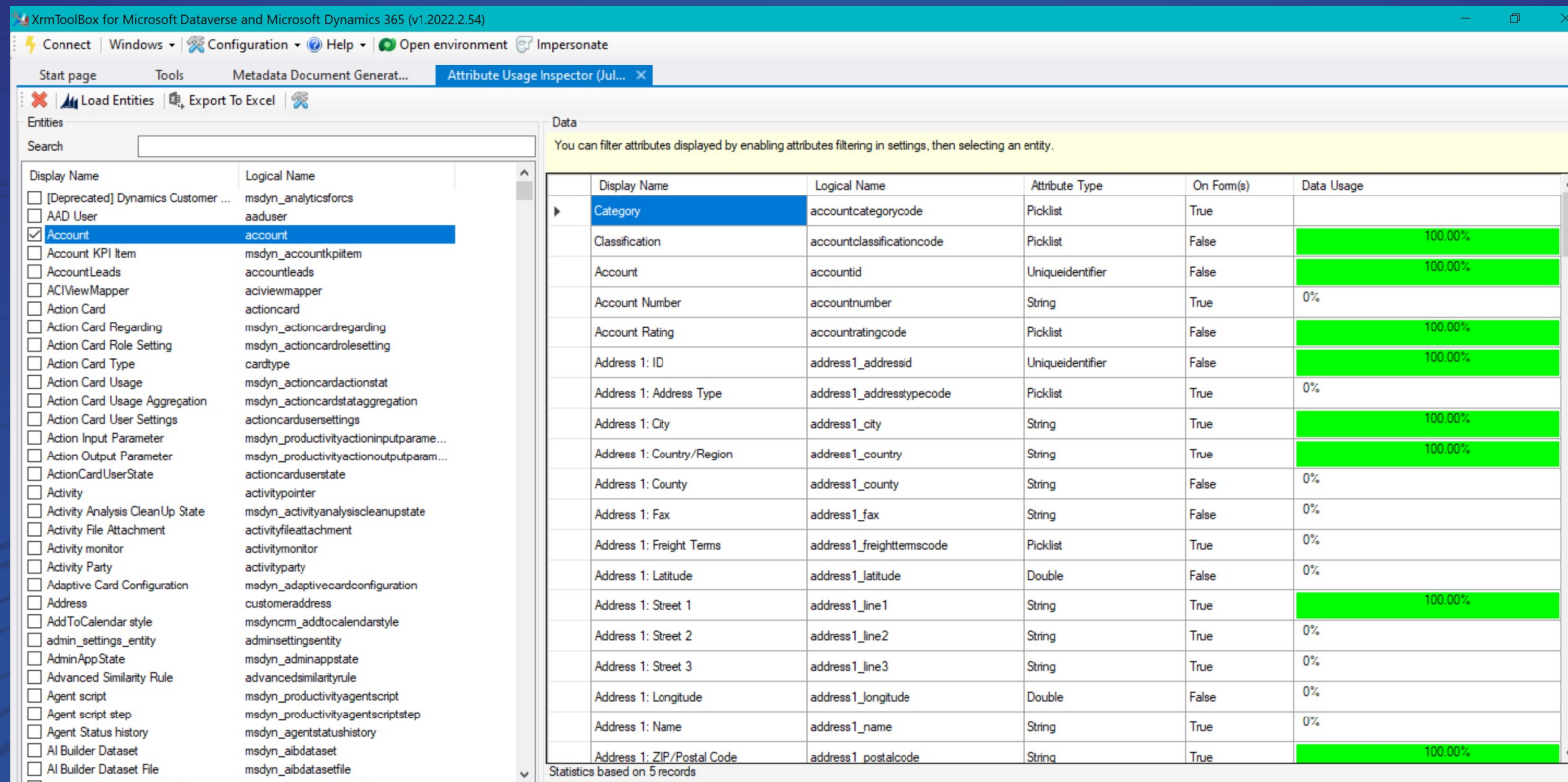
Add an Admin Area to Your App Navigation

- Add an Admin area for less used items
- Navigation > +Add > Area



Find Fields not in use

- XrmToolBox: Attribute Usage Inspector



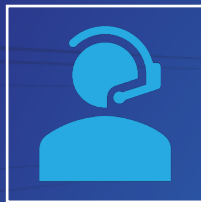
The screenshot shows the XrmToolBox interface with the Attribute Usage Inspector tool open. The left pane lists various entities, with 'Account' selected. The right pane displays a table of attributes for the selected entity, including their logical names, attribute types, and data usage percentages.

Display Name	Logical Name	Attribute Type	On Form(s)	Data Usage
Category	accountcategorycode	Picklist	True	100.00%
Classification	accountclassificationcode	Picklist	False	100.00%
Account	accountid	Uniqueidentifier	False	100.00%
Account Number	accountnumber	String	True	0%
Account Rating	accountratingcode	Picklist	False	100.00%
Address 1: ID	address1_addressid	Uniqueidentifier	False	100.00%
Address 1: Address Type	address1_adresstypecode	Picklist	True	0%
Address 1: City	address1_city	String	True	100.00%
Address 1: Country/Region	address1_country	String	True	100.00%
Address 1: County	address1_county	String	False	0%
Address 1: Fax	address1_fax	String	False	0%
Address 1: Freight Terms	address1_freighttermscode	Picklist	True	0%
Address 1: Latitude	address1_latitude	Double	False	0%
Address 1: Street 1	address1_line1	String	True	100.00%
Address 1: Street 2	address1_line2	String	True	0%
Address 1: Street 3	address1_line3	String	True	0%
Address 1: Longitude	address1_longitude	Double	False	0%
Address 1: Name	address1_name	String	True	0%
Address 1: ZIP/Postal Code	address1_postalcode	String	True	100.00%

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](https://make.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

Edit details

Sales Trial

Name *

URL *

crm.dynamics.com

Type *

Trial

Refresh cadence ⓘ

Frequent


Frequent

Moderate

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

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.