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DYNAMICSCON LIVE

MAY 2024

live.dynamicscon.com

Things I Know Now That I Wish I Knew Sooner

about Dynamics 365 CE/CRM & the Power Platform



Meet your Presenters



Ali Nelson
Lead Functional Consultant
Stoneridge Software



Maryam Umar
Functional Consultant
Stoneridge Software



What is a Functional Consultant?

- Business Analyst
 - Gather requirements
 - Maintain backlog
 - Manage Azure DevOps, Jira boards
- Low-code development/configuration
- Creates training documentation
- Best friend, trusted partner to our clients



What is a Partner?

PARTNER

- A company that provides services to support your business and users
- Multiple options of support: implementation, pay-as-you-go, support plans, licensing
- Ask if they provide a specific service

ISV

- Independent Software Vendor
- A company that provides a software product related to the software you use
- Support you through implementing the tool and licensing



How long have you been working with Dynamics 365?

0-1 year

2-5 years

6-10
years

10+ years



Which product is your primary focus?



Agenda

- Why this topic?
- Introduction to the Power Platform
- Dynamics 365 Overview
- Environment Best Practices
- Trial Environments
- Maker Portal
- Solutions
- Automation can be Simple
- Customize Choices
- Grid Controls
- Data Relationships
- Searching Techniques
- Create Your Own Views
- Collaborate with Teams
- Outlook Integration
- Love Microsoft Learn
- Certifications

Why this topic?

$A = \pi r^2$
 $C = 2\pi r$

$V = \frac{1}{3} \pi r^2 h$

$V = \pi r^2 h$

	30°	45°	60°
sin	$\frac{1}{2}$	$\frac{\sqrt{2}}{2}$	$\frac{\sqrt{3}}{2}$
cos	$\frac{\sqrt{3}}{2}$	$\frac{\sqrt{2}}{2}$	$\frac{1}{2}$
tan	$\frac{\sqrt{3}}{3}$	1	$\sqrt{3}$

$\int \sin x dx = -\cos x + C$
 $\int \frac{dx}{\cos^2 x} = \tan x + C$
 $\int \tan x dx = -\ln|\cos x| + C$
 $\int \frac{dx}{\sin x} = \ln\left|\frac{x}{2}\right| + C$
 $\int \frac{dx}{a^2 + x^2} = \frac{1}{a} \arctg \frac{x}{a} + C$
 $\int \frac{dx}{x^2 - a^2} = \frac{1}{2a} \ln\left|\frac{x-a}{x+a}\right| + C$

$\tan(\theta)$

$ax^2 + bx + c = 0$
 $a\left(x + \frac{b}{a}x + \frac{c}{a}\right) = 0$
 $x^2 + 2\frac{b}{2a}x + \left(\frac{b}{2a}\right)^2 - \left(\frac{b}{2a}\right)^2 + \frac{c}{a} = 0$
 $\left(x + \frac{b}{2a}\right)^2 - \frac{b^2 - 4ac}{4a^2} = 0$



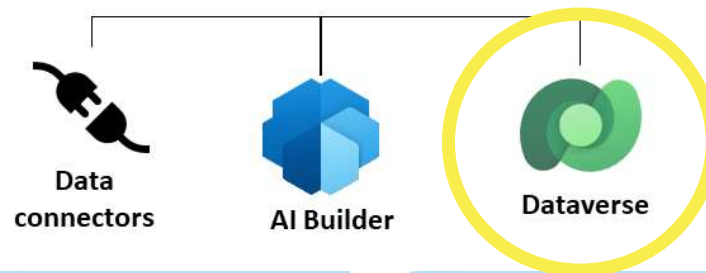
Let's get started



Microsoft Power Platform



The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



Dataverse

Relational Database

Cloud-based

Robust security

Supports various data types: files, images, blob

Customer Engagement (CE) Apps sit on top of Dataverse



Tables, Columns, Rows

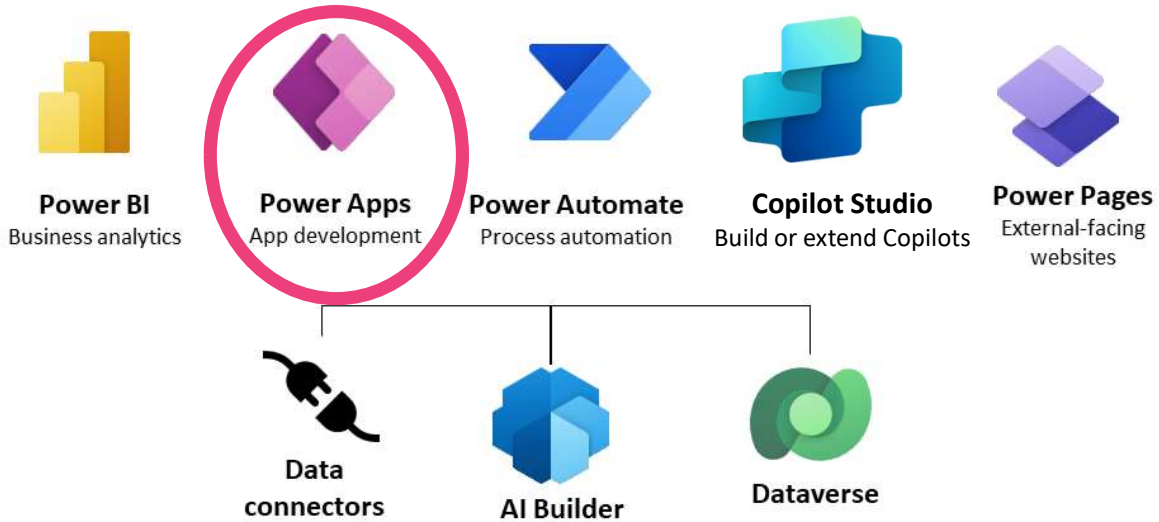
Name	Email	Phone Number	Job Title
Jim Halpert	jimh@dundermifflin.com	888-555-1924	Salesperson
Stanley Hudson	Stanley.Hudson@staples.com	808-555-1228	Salesperson
Pam Beesly	pamela.beesly@officemax.com	877-555-9879	Office Administrator
Angela Martin	crazycatlady@yahoo.com	808-555-1625	Accountant II
Creed Bratton	whoisthis@aol.com	877-999-4444	Quality Control Analyst
Toby Flenderson	tobyf@dundermifflin.com	888-555-1928	HR Business Partner
Kelly Kapur	beyonceisaqueen@gmail.com	866-555-0099	Customer Service Agent



Power Apps



The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.



Power Apps

Canvas Apps

- Pull data from multiple sources
- Highly customizable
- Can take a lot of time to build
- Add to model-driven apps



Model-Driven Apps




- Require Dataverse database
- Used within Dynamics 365
- More standardized look and feel
 - use forms, views, etc.





Canvas App




Park Inspection App

	Ronnie Van Zant Park Green Cove Springs	>	* InspectionDate <input type="text" value="10/16/2023"/>	Rating ☆☆☆☆☆	* ParkID <input type="text" value="1"/>
	Thunderbolt Park Fleming Island	>	* Inspector <input type="text" value="ali.nelson@stonerid;"/>	Comments <input style="width: 100%; height: 40px;" type="text"/>	
			<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

	Black Creek Park and Trail Orange Park	>	10/6/2023 GXXX@XXXX.com	★☆☆☆☆	<input type="button" value="edit"/> <input type="button" value="trash"/>
	Doctors Lake Park Fleming Island	>	8/29/2023 IXXX@XXXX.com	★★☆☆☆	<input type="button" value="edit"/> <input type="button" value="trash"/>
	Master Sgt. John F. Hayes Fleming Island	>	8/29/2023 IXXX@XXXX.com	★★★☆☆	<input type="button" value="edit"/> <input type="button" value="trash"/>

Park Inspection App

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			<input type="button" value="Submit"/> <input type="button" value="Cancel"/>		

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	Master Sgt. John F. Hayes Fleming Island	>	8/29/2023 IXXX@XXXX.com	★★★☆☆	<input type="button" value="edit"/> <input type="button" value="trash"/>

Model-Driven App

Dynamics 365 | Sales Hub | **SANDBOX**

Alpine Ski House (sample) - Saved
Account - Account OOB

\$90,000.00 Annual Revenue | **4,800** Number of Employees | **Sara Jo Larsen** Owner

Summary | Project Price Lists | Details | Assets and Locations | Scheduling | Servicing | Files | Related

ACCOUNT INFORMATION

Account Name	Alpine Ski House (sample)
Customer Type	---
Phone	555-0157
Fax	---
Website	http://www.alpineskihouse.com/
Parent Account	---
Phone	555-0157
Fax	---
Website	http://www.alpineskihouse.com/
Parent Account	---
Ticker Symbol	---
Relationship Type	---
Product Price List	---

Timeline

- Auto-post on Case Delivery never arrived (sample): 3/31/2022, 8:22 AM
Case created by Sara Jo Larsen for Account Alpine Ski House ...
- Auto-post on Case Contact Information requested (...): 3/31/2022, 8:22 AM
Case created by Sara Jo Larsen for Account Alpine Ski House ...
- Auto-post on Opportunity Very likely will order 18 (...): 3/31/2022, 8:22 AM
Opportunity created by Sara Jo Larsen for Account Alpine Ski House ...
- Auto-post on Case Delivery never arrived (sample): 3/31/2022, 8:22 AM
Case created by Sara Jo Larsen for Account Alpine Ski House ...
- Auto-post on Case Contact information requested (...): 3/31/2022, 8:22 AM
Case created by Sara Jo Larsen for Account Alpine Ski House ...
- Auto-post on Opportunity Very likely will order 18 (...): 3/31/2022, 8:22 AM
Opportunity created by Sara Jo Larsen for Account Alpine Ski House ...
- Auto-post on Account Alpine Ski House (sample): 3/31/2022, 8:21 AM
Account created by Sara Jo Larsen

Assistant

Notifications

No notifications or suggestions
Check back later to see what's new and stay up to date.

Primary Contact

Paul Cannon (sample)

Check back later to see what's new and stay up to date.

Primary Contact

Paul Cannon (sample)

Email

someone_h@example.com

Business

555-0107

CONTACTS

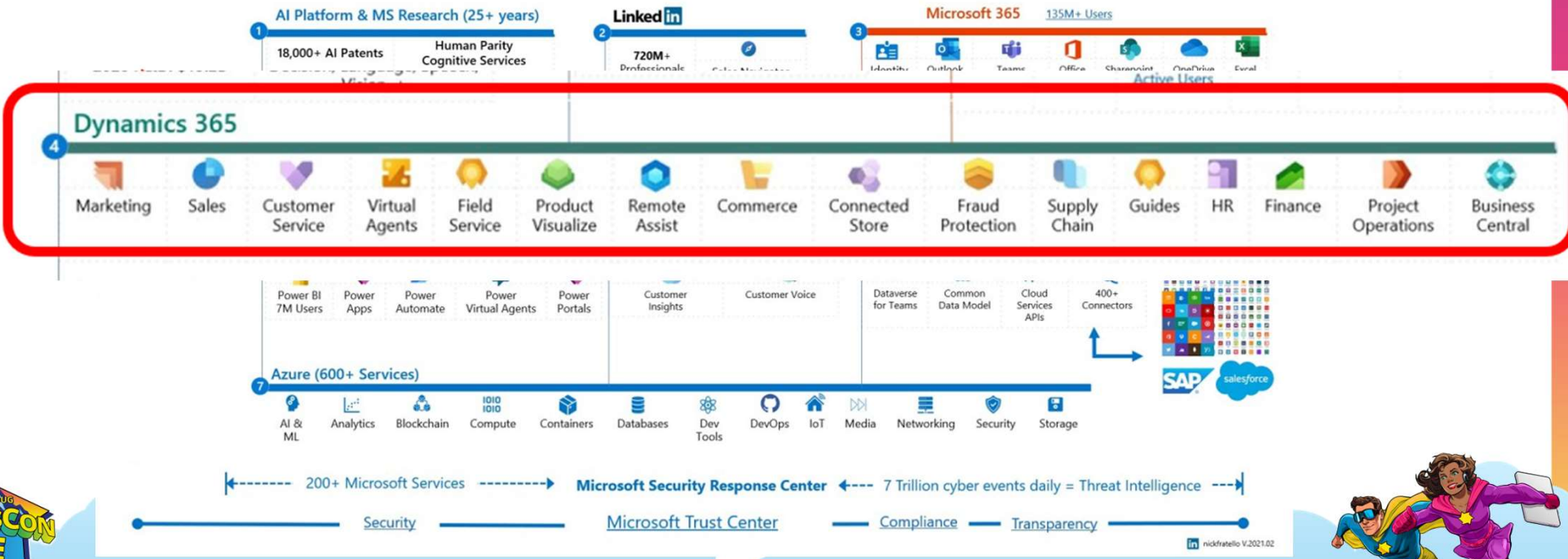


Where does Dynamics 365 fit in?



Business Application Solution Ecosystem

Microsoft's Business Applications are built on Azure, using a Common Data Model that unifies data in Dataverse. Power Platform is the low code development platform for Microsoft's Office 365, Teams, Dynamics 365 business applications (CRM & ERP) and integrates with 400+ services.



nickfratello V.2021.02

D365 Customer Engagement (CE) Apps

CE apps are
model-driven apps

Each app comes with
its own set of tables





















Some tables span
multiple different apps

Licensing is different, which is what
enables your access to the tables





















You can configure multiple different apps in your
system (Field Service, Sales, and Customer Service)



Published Apps (20)

 Dynamics 365 — custom Provides access to the full suite of capabilities, including administration Microsoft Dynamics 365 10/19/2023 WEB	 Academy Ag Default Publisher for org5771b300 3/25/2022 UNIFIED INTERFACE	 Academy App - 1 Default Publisher for org5771b300 3/10/2023 UNIFIED INTERFACE	 Brady Model-Driven App Brady Model-Driven App PL900 Default Publisher for org5771b300 6/14/2023 UNIFIED INTERFACE	 Channel Integration Fra... Bring your communication channels and build immersive experience with Dynamics 365 UNIFIED INTERFACE	 Connected Field Service Use Connected Field Service to monitor connected devices to make Dynamics 365 UNIFIED INTERFACE	 Customer Service admin ... A unified app for customer service administration. Dynamics 365 UNIFIED INTERFACE
 Customer Service Hub A focused, interactive experience for managing your customer service. Default Publisher for org5771b300 9/27/2022 UNIFIED INTERFACE	 Customer Service worksp... Multi-session Customer Service with Productivity tools Dynamics 365 UNIFIED INTERFACE	 Dynamics 365 App for O... Provides access to Dynamics 365 App for Outlook for enabled users. Dynamics 365 UNIFIED INTERFACE	 Field Service Field Service allows organizations to deliver intelligent, world class field Dynamics 365 UNIFIED INTERFACE	 Field Service Mobile Dynamics 365 Field Service Mobile is a fully customizable, multi-device Dynamics 365 UNIFIED INTERFACE	 Portal Management Configure and manage your online platform to communicate and Microsoft UNIFIED INTERFACE	 Project Manage projects from creation to delivery. Dynamics 365 UNIFIED INTERFACE
 Project Operations A combined full featured experience for managing your Projects. Dynamics 365 UNIFIED INTERFACE	 Project Operations Team ... Team Member access to Project Operations. Dynamics 365 UNIFIED INTERFACE	 Resource Scheduling Provides access to the Resource Scheduling solution Dynamics 365 UNIFIED INTERFACE	 Sales Hub Modernize the sales experience with this mobile relationship Default Publisher for org5771b300 3/10/2023 UNIFIED INTERFACE	 Sales Team Member Team Member access to the Dynamics 365 Sales app module. Dynamics 365 UNIFIED INTERFACE	 Solution Health Hub Solution Health Hub enables rules-based validation on the health of Dynamics 365 UNIFIED INTERFACE	

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 Customer Service Hub A focused, interactive experience for managing your customer service. Default Publisher for org5771b300 9/27/2022 UNIFIED INTERFACE	 Customer Service worksp... Multi-session Customer Service with Productivity tools Dynamics 365 UNIFIED INTERFACE	 Dynamics 365 App for O... Provides access to Dynamics 365 App for Outlook for enabled users. Dynamics 365 UNIFIED INTERFACE	 Field Service Field Service allows organizations to deliver intelligent, world class field Dynamics 365 UNIFIED INTERFACE	 Field Service Mobile Dynamics 365 Field Service Mobile is a fully customizable, multi-device Dynamics 365 UNIFIED INTERFACE	 Portal Management Configure and manage your online platform to communicate and Microsoft UNIFIED INTERFACE	 Project Manage projects from creation to delivery. Dynamics 365 UNIFIED INTERFACE
 Project Operations A combined full featured experience for managing your Projects. Dynamics 365 UNIFIED INTERFACE	 Project Operations Team ... Team Member access to Project Operations. Dynamics 365 UNIFIED INTERFACE	 Resource Scheduling Provides access to the Resource Scheduling solution Dynamics 365 UNIFIED INTERFACE	 Sales Hub Modernize the sales experience with this mobile relationship Default Publisher for org5771b300 3/10/2023 UNIFIED INTERFACE	 Sales Team Member Team Member access to the Dynamics 365 Sales app module. Dynamics 365 UNIFIED INTERFACE	 Solution Health Hub Solution Health Hub enables rules-based validation on the health of Dynamics 365 UNIFIED INTERFACE	



Custom Model-Driven Apps

Build your own model-driven apps

Reduce “noise” in your apps

Simplify user experience

Copy model-driven apps, modify as needed

Custom apps by user persona



Environments & Solutions



Environment Best Practices

DEV

TEST

TRAIN

PROD



Trial Environments

- Use trial environments to test your configuration skills without being a system admin
- Get a free trial for 30 days of a variety of apps:
- <https://dynamics.microsoft.com/en-us/dynamics-365-free-trial/>



Solutions

Power Apps

Environment: AcademySandbox-Tem...

Search

+ New solution ← Import solution 📁 Open AppSource 🗨 Publish all customizations ⌚ See history ...

Solutions

Unmanaged Managed All

Display name	Name	Created	Version	Publisher	Solution check
2023 Mapping POC	2023MappingPOC	1 week ago	1.0.0.0	Stoneridge So...	Hasn't been run
2023 Summit Presentation	2023SummitPresent...	2 months ago	1.0.0.0	Stoneridge So...	Hasn't been run
FluentUI.Badge.PCF	FluentUIBadgePCF	5 months ago	1.0.0.1	drivardxrm	Hasn't been run
PCF control Test	PCFcontrolTest	5 months ago	1.0.0.0	Stoneridge So...	Hasn't been run
Reilly	Reilly	7 months ago	1.0.0.0	Stoneridge So...	Hasn't been run
John	John	1 year ago	1.0.0.0	Stoneridge So...	Hasn't been run
Ali	Ali	1 year ago	1.0.0.0	Stoneridge So...	Hasn't been run

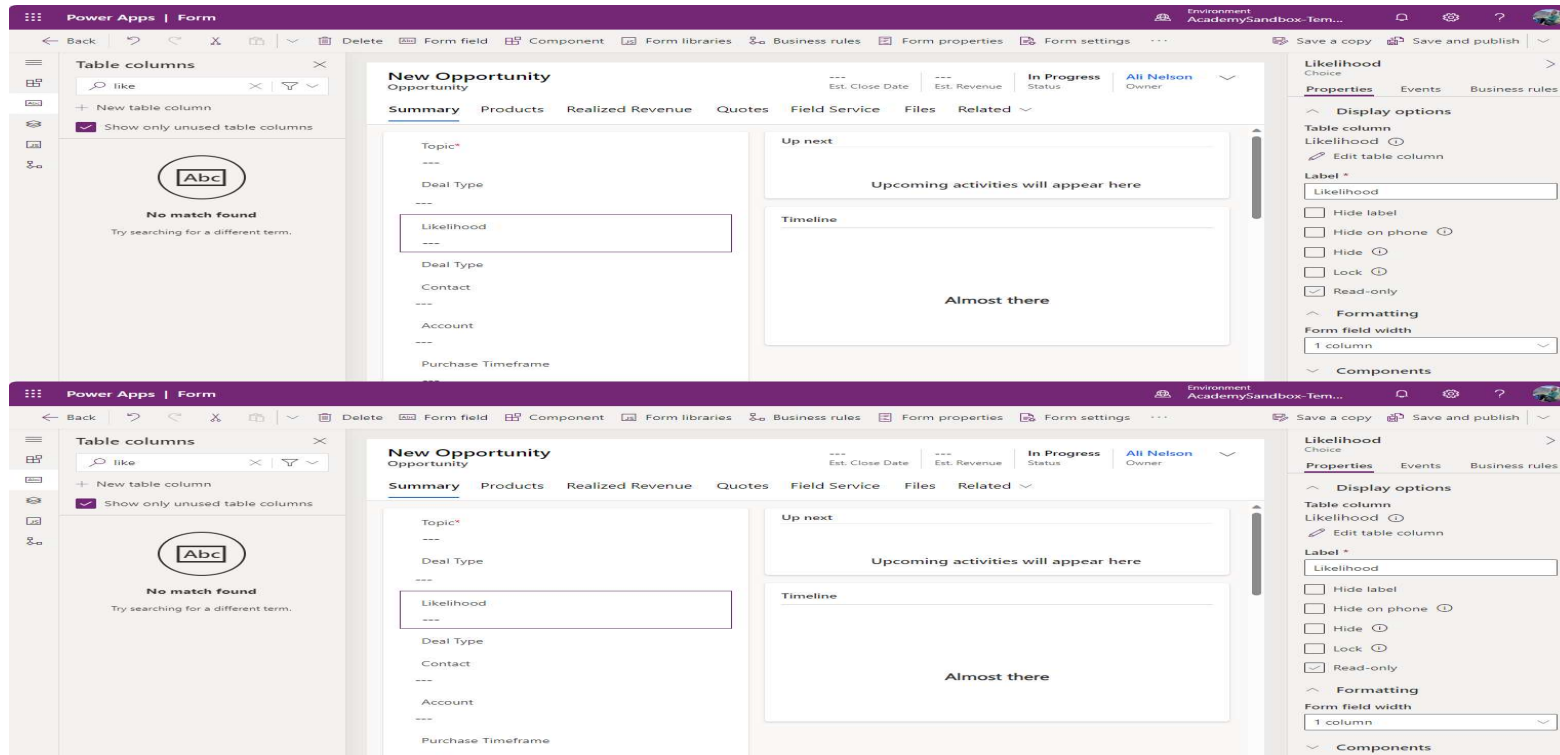


Form & View Customizations

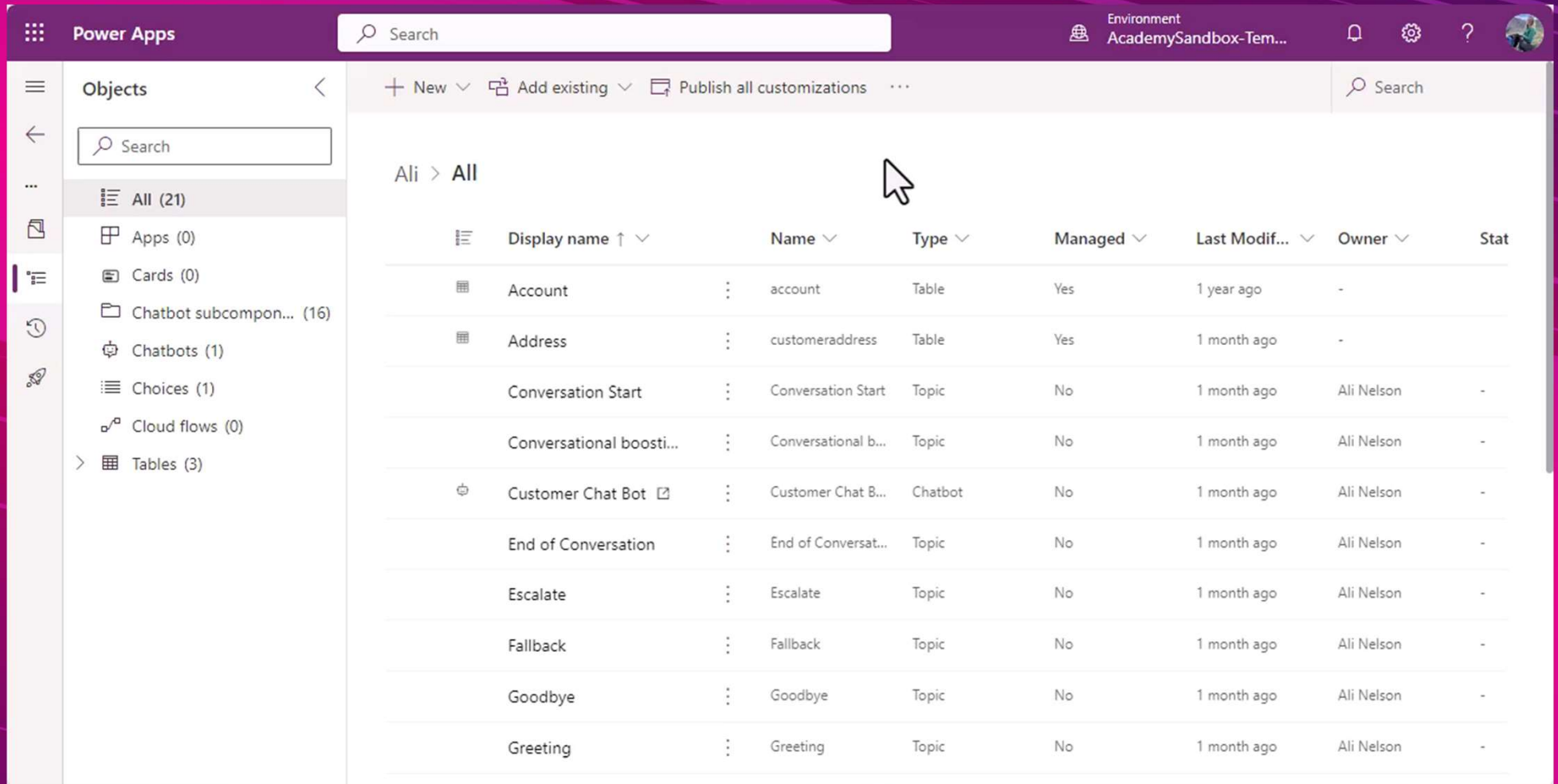


Maker Portal

make.powerapps.com



Maker Portal - Create a Column



The screenshot displays the Power Apps Maker Portal interface. The top navigation bar includes the 'Power Apps' logo, a search bar, and the environment name 'AcademySandbox-Tem...'. The left sidebar shows a navigation menu with categories like 'Objects', 'Apps', 'Cards', 'Chatbot subcompon...', 'Chatbots', 'Choices', 'Cloud flows', and 'Tables'. The main area shows a list of objects under the 'All' view, with columns for 'Display name', 'Name', 'Type', 'Managed', 'Last Modif...', 'Owner', and 'Stat'. A mouse cursor is hovering over the 'Name' column header.

Display name ↑	Name	Type	Managed	Last Modif...	Owner	Stat
Account	account	Table	Yes	1 year ago	-	
Address	customeraddress	Table	Yes	1 month ago	-	
Conversation Start	Conversation Start	Topic	No	1 month ago	Ali Nelson	-
Conversational boosti...	Conversational b...	Topic	No	1 month ago	Ali Nelson	-
Customer Chat Bot	Customer Chat B...	Chatbot	No	1 month ago	Ali Nelson	-
End of Conversation	End of Conversat...	Topic	No	1 month ago	Ali Nelson	-
Escalate	Escalate	Topic	No	1 month ago	Ali Nelson	-
Fallback	Fallback	Topic	No	1 month ago	Ali Nelson	-
Goodbye	Goodbye	Topic	No	1 month ago	Ali Nelson	-
Greeting	Greeting	Topic	No	1 month ago	Ali Nelson	-

Customize Choices

All Opportunities Filter by keyword

Topic ↑	Potenti...	Email A...	Rating	Likelihood	Status	Actual ...	Actual R...	Est. clos...
> 10 orders of Prod...	Fourth Co...		Hot		Won	3/11/2022	\$22,469.39	3/16/2022
> 10 orders or Prod...	Litware, L...		Warm		Won	2/4/2022	\$14,589.45	1/29/2022
> 6 orders of Produ...	Fabrikam,...		Hot	🔥	Open	3/31/2022		5/1/2022
> Before labor day t...			Warm	🔥	Open			
> David Smith - Ne...	David Smi...		Warm	🔥	Open			
○ > Dynamics F&O Im...	Stoneridg...		Warm	🔥	Open			11/1/2023
> Follow-up with inf...	Margie's ...		Cold	❄️	Open			
> Good prospect (s...	Tailspin T...		Cold		Open			
> Interested in bulk ...	Hyvee		Warm		Won	4/11/2022	\$230.00	5/24/2022

All Opportunities Filter by keyword

Topic ↑	Potenti...	Email A...	Rating	Likelihood	Status	Actual ...	Actual R...	Est. clos...
> 10 orders of Prod...	Fourth Co...		Hot		Won	3/11/2022	\$22,469.39	3/16/2022
> 10 orders or Prod...	Litware, L...		Warm		Won	2/4/2022	\$14,589.45	1/29/2022
> 6 orders of Produ...	Fabrikam,...		Hot	🔥	Open	3/31/2022		5/1/2022
> Before labor day t...			Warm	🔥	Open			
> David Smith - Ne...	David Smi...		Warm	🔥	Open			
○ > Dynamics F&O Im...	Stoneridg...		Warm	🔥	Open			11/1/2023
> Follow-up with inf...	Margie's ...		Cold	❄️	Open			
> Good prospect (s...	Tailspin T...		Cold		Open			
> Interested in bulk ...	Hyvee		Warm		Won	4/11/2022	\$230.00	5/24/2022



Grid Controls

This screenshot shows the Dynamics CRM interface for an account named "Alpine Ski House (sample)". The interface includes a top navigation bar with various actions like Save, New, and Deactivate. Below the navigation bar, there are tabs for Summary, New Tab, Details, Assets and Locations, Scheduling, Servicing, Files, Authors M:M, Authors Connection, and Related. The main content area is divided into several sections: Relationship Type, Product Price List, Category Test, ADDRESS (with service address 2313 B Southampton Rd, Missoula TX 58047 U.S.), and a map. A central "Opportunities" subgrid is highlighted with a red box. The subgrid has a title "Opportunities" and a "Subgrid" label. It includes a "Filter by keyword" input field and a table with columns for Topic, Potenti..., Email A..., and Rating. The table contains one row with the text "Very likely will or...", "Alpine Ski...", and "Hot". Below the table, there is a pagination bar showing "1 - 1 of 1" and "Page 1".

This is a duplicate of the screenshot above, showing the same Dynamics CRM interface for the "Alpine Ski House (sample)" account. The "Opportunities" subgrid is highlighted with a red box, and the content is identical to the first screenshot.



Grid Controls

Read-Only Grid

- Standard, OOB set-up
- View data
- Open a record to edit it

Editable Grid

- Add to grids to allow users to edit without opening a record
- Great for when editing a lot of data
- Display related child items

Power Apps Grid Control

- Updated version of grids
- Enables more features (toggles, colors)
- Display related child items



Grid Controls

The screenshot displays the 'New Account' form in Microsoft Dynamics 365. The 'CONTACTS' subgrid is visible, showing columns for 'Full Name' and 'Email'. The 'Add component' menu is open, listing options: Search, Calendar, Editable Grid, and Power Apps grid control. The 'Components' section in the right-hand pane is also highlighted, showing a '+ Component' button.

CONTACTS
Subgrid

Properties
Contacts (Company Name)

Default view
Active Contacts Subgrid...
+ Add view
 Allow users to change view
 Hide search box

Default chart
Select an option
+ Add chart
 Show chart only
 Allow users to change chart

Maximum number of rows
6
 Use available space

Formatting
Component width
1 column

Components
+ Component

Add component
Search
Calendar
Editable Grid
Power Apps grid control
Get more components



Nested Grids with Child Items

Dynamics 365 Sales trial

Your trial has ended. Contact us to learn more about how Dynamics 365 Sales can help boost your bottom line.

Show As Show Chart + New Delete Visualize this view Export to Excel Import from Excel Open Dashboards Share

All Accounts

Edit columns Edit filters Filter by keyword

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)	Status			
Fabrikam, Inc.	245-46655	Lynnwood	Haroun Stormonth	haroun@fabrikaminc.com	Active			
Rows: 1								
Topic	Potential ...	Est. close date	Est. revenue	Contact	Account	Probability	Rating	Email (Potential Cust...)
2 Café Duo Espresso Machines for Fabrikam	Fabrikam, Inc.	4/27/2024	\$25,800.00	Zoltán Szabó	Fabrikam, Inc.	90	Warm	
Rows: 2								
Trey Research	619-555-0127	San Francisco	Alex Baker	alex@treyresearch.net	Active			
Rows: 2								
Topic	Potential ...	Est. close date	Est. revenue	Contact	Account	Probability	Rating	Email (Potential Cust...)
5 Café A-100 Automatic	Trey Research	4/11/2024	\$77,500.00	Alex Baker	Trey Research	85	Hot	
50 Café A-100 Automatic	Trey Research	4/29/2024	\$95,000.00	Avery Howard	Trey Research	81	Warm	
Rows: 2								
Northwind Traders	614-555-0121	Columbus	Heriberto Nathan	heriberto@northwindtraders.com	Active			
Alpine Ski House	281-555-0157	Dallas	Cacilia Viera	cacilia@alpineskihouse.com	Active			
A. Datum Corporation	425-555-0158	Redmond	Kevin Martin	kevin@adatum.com	Active			

Rows: 5

Take a tour



Modify Views

Dynamics 365 | Sales Hub

Search

SANDBOX

Show Chart | Focused view | New | Delete | Refresh | Collaborate | Visualize this view | Email a Link

Active Accounts

Edit columns | Edit filters | Filter by keyword

Account Name ↑	Main Phone	Address 1: C...	Primary Contact	Email (Primary Contact)
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_j@example.c...
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sampl...	someone_c@example.c...
Ali Test 910				
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.c...
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.c...
Botsford Group	8045551234			
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.c...
Costco	(800) 555 - 1...	Inver Grove H...	Creed Bratton	Ali.nelson@stoneridges...
Dick's Sporting Goods	(800) 555 - 1...	Inver Grove H...		
Dollar General	(800) 555 - 1...	Inver Grove H...		

1 - 50 of 50 | Page 1

Automation

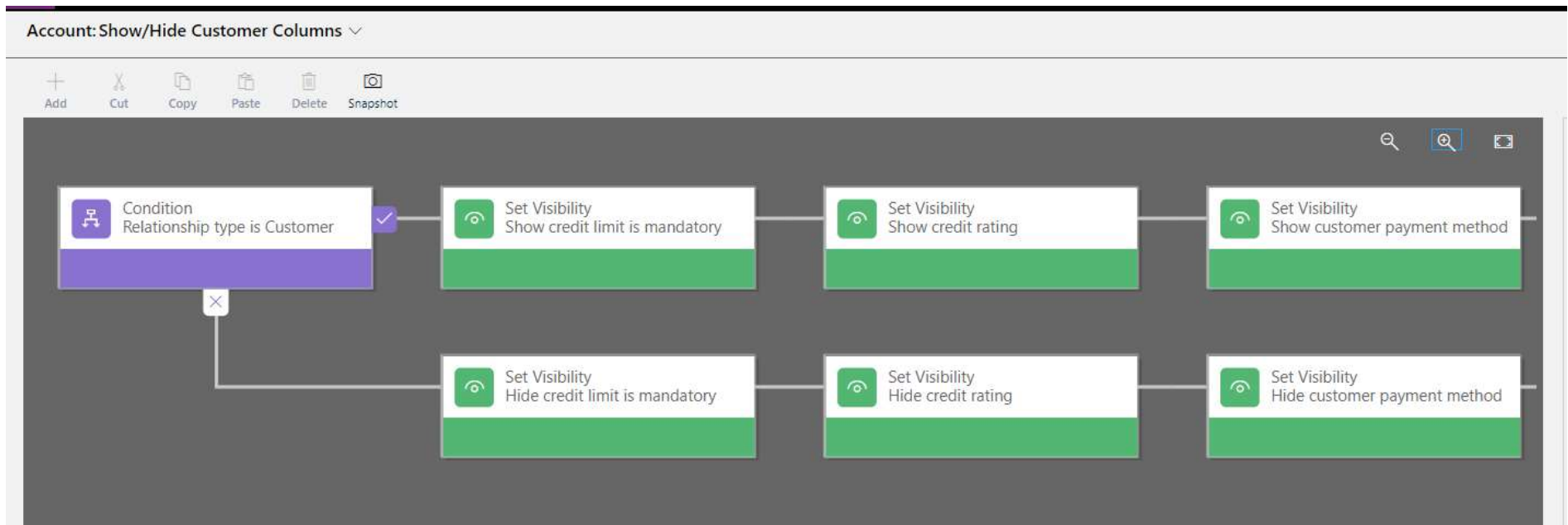


Automation can be Simple

If something seems tedious or more difficult than it should be ... you can probably make it easier via automation!



Business Rules



Business Rules Types

Add Condition

- Always start with a condition. If the condition is met, the Business Rule will be applied

Add Recommendation

- Adds a lightbulb with a message suggesting what the user should do with the column

Add Lock/Unlock

- Will lock or unlock columns so users can only edit them when the condition is met

Add Show Error Message

- Display a red error message against a specific column

Add Set Field Value

- Set a column to be a specific value or another column and the user cannot override the value

Add Set Default Value

- Sets a default value for a field that the user can later override

Add Set Business Required

- Make a column optional or required

Add Set Visibility

- Display or hide a column



Workflows & Power Automate

Process: Contact - populate department (text) field

Information

General Administration Notes

Hide Process Properties

Process Name * Contact - populate department (text) fie

Activate As Process

Available to Run

Run this workflow in the background (recommended)

As an on-demand process

As a child process

Options for Automatic Processes

Scope Organization

Start when: After

Record is created

Record status changes

Record is assigned

Record fields change [View](#)

Record is deleted

Execute as:

The owner of the workflow

The user who made changes to the record

Department (lookup) contains data

If Contact:Department contains data, then:

- Update department (text) field that writes to F&O
Update: Contact [View properties](#)

Phone Call - Create follow-up task

Undo Redo Comments Save Flow

When follow-up required equals yes

↓

Parse JSON

↓

Compose

+

Switch

* On

Regarding (Tab... x

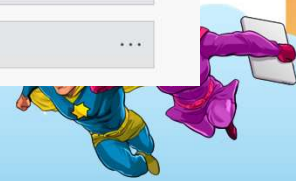
Case | Create follow up task on account

Case | Create follow up task on contact

Case | Create follow up task on lead

Case | Create follow up task on opportunity

Case | Create follow up task on sample request



Productivity Tips



Enable Teams Chat in CE

The screenshot displays the Dynamics 365 Sales Hub interface for an account named "Alpine Ski House (sample)". The account information includes:

- Account Name: Alpine Ski House (sam...)
- Customer Type: ---
- Phone: 555-0157
- Fax: ---
- Website: http://www.alpine...
- Parent Account: ---
- Phone: 555-0157
- Fax: ---
- Website: http://www.alpine...
- Parent Account: ---
- Ticker Symbol: ---
- Relationship Type: ---
- Product Price List: ---

The Timeline section shows several auto-post notifications, such as "Auto-post on Case Delivery never arrived (sample): 3/31/2022, 8:22 AM" and "Auto-post on Opportunity Very likely will order 18 ... 3/31/2022, 8:22 AM".

The Assistant section displays "No notifications or suggestions" and "Primary Contact" information for Paul Cannon (sample), including an email address (someone_h@example.com) and a business phone number (555-0107).

A Teams chat window is overlaid on the right side of the screen, titled "learns chats". It shows a list of chats connected to the account, with a selected chat for "Alpine Ski House (sample)". The chat content includes a message: "Can you please tell me what your conversation with them was? Are they interested in buying?". The chat window also shows account details like "Account Name: Alpine Ski House (sample)", "Account Number: ABCO9M32", "Primary Contact: Paul Cannon (sample)", "Address 1: City: Missoula", and "Main Phone: 555-0157". A green arrow points to the chat window's close button.





\$90,000.00
Annual Revenue

4,800
Number of Employees

Sara Jo Larsen
Owner

ACCOUNT INFORMATION

Account Name * **Alpine Ski House (sam...**

Customer Type * ---

Phone **555-0157**

Fax ---

Website **http://www.alpine...**

Parent Account ---

Ticker Symbol ---

Relationship Type ---

Product Price List ---

ADDRESS

Service Address **2313 B
Southampton Rd
Missoula TX 58047
11 S**

Timeline

- Search timeline
- Enter a note...
- Auto-post on Case Delivery never arrived (sample): 3/31/2022, 8:22 AM
Case created by Sara Jo Larsen for Account Alpine Ski House ...
 - Auto-post on Case Contact information requested (... 3/31/2022, 8:22 AM
Case created by Sara Jo Larsen for Account Alpine Ski House ...
 - Auto-post on Opportunity Very likely will order 18 ... 3/31/2022, 8:22 AM
Opportunity created by Sara Jo Larsen for Account Alpine Ski House ...
 - Auto-post on Account Alpine Ski House (sample): 3/31/2022, 8:21 AM
Account created by Sara Jo Larsen

Assistant

Notifications

No notifications or suggestions

Check back later to see what's new and stay up to date.

Primary Contact

Alpine Ski House (samp...

2 | ...

Main Phone: 555-0157
[Open in Dynamics 365](#)

Last read

Carrie Kuhl 9:11 PM

They are looking to outfit their ski lodge

Type a message

Chats connected to Alpine Ski House (sa...

Alpine Ski House (sample) 9:11 PM
Account · Alpine Ski House (sample)
Carrie: They are looking to outfit their ski l...

New connected chat

Other chats

[Blurred chat list]

Ena

Alpine Ski House (samp... Chat Files +

9:08 PM

Can you please tell me what your conversation with them was? Are they interested in buying?

Account Name: Alpine Ski House (sample)
Account Number: ABCO9M32
Primary Contact: Paul Cannon (sample)
Address 1: City: Missoula
Main Phone: 555-0157
[Open in Dynamics 365](#)

Carrie Kuhl added Dynamics 365 here.

Last read

Carrie Kuhl 9:11 PM

They are looking to outfit their ski lodge

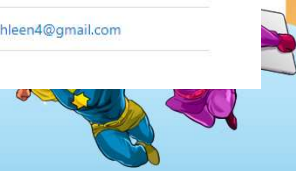
Type a message



Use Teams as a Home Base

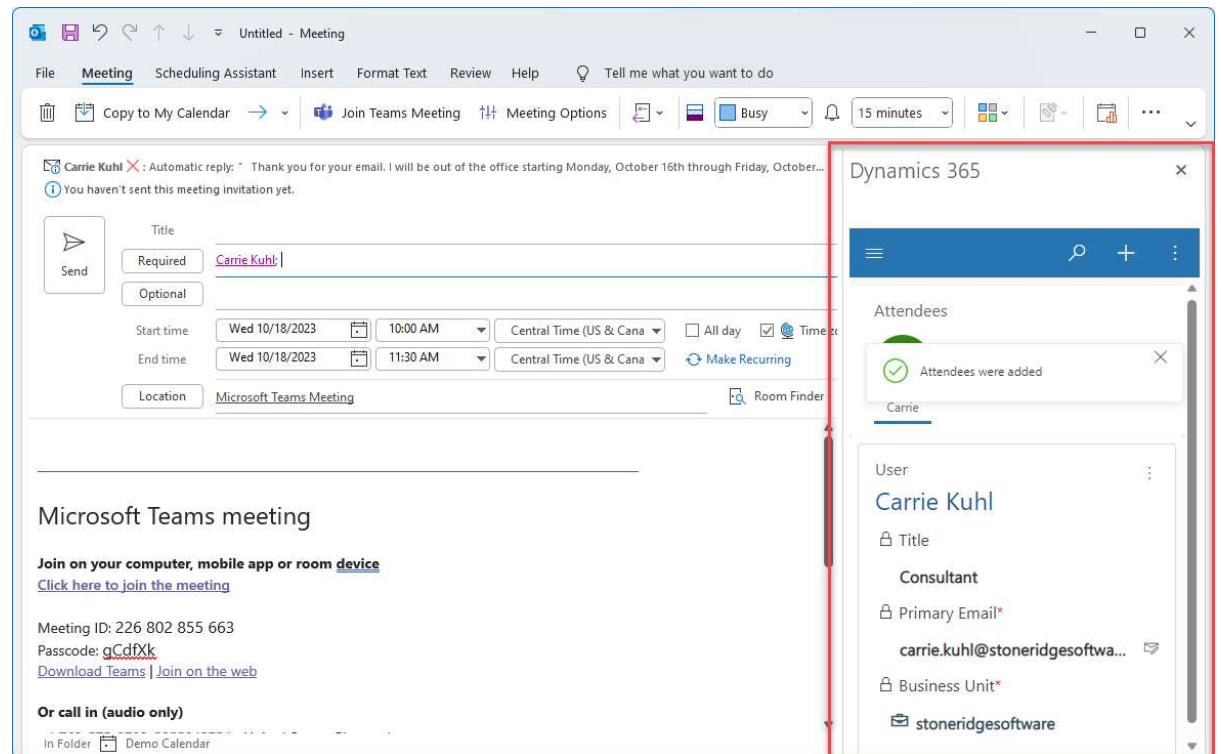
The screenshot displays the Microsoft Teams interface. On the left is the navigation pane with various app icons. The main area shows a list of 'Active Accounts' in a table view. The table has columns for Account Name, Main Phone, Address 1: City, Primary Contact, and Email (Primary Contact). The 'Active Accounts' tab is highlighted in the top navigation bar.

Account Name	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
A. Datum Corporation (sample)	555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com
Adventure Works (sample)	555-0152	Santa Cruz	Nancy Anderson (sample)	someone_c@example.com
Alii Test 910				
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
Botsford Group	8045551234			
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
Alpine Ski House (sample)	555-0157	Missoula	Paul Cannon (sample)	someone_h@example.com
Blue Yonder Airlines (sample)	555-0154	Los Angeles	Sidney Higa (sample)	someone_e@example.com
Botsford Group	8045551234			
Contoso Pharmaceuticals (sample)	555-0156	Redmond	Robert Lyon (sample)	someone_g@example.com
Costco	(800) 555 - 1240	Inver Grove Heights	Creed Bratton	Ali.nelson@stoneridgesoftware.com
<u>Dick's Sporting Goods</u>	<u>(800) 555 - 1256</u>	Inver Grove Heights		
Dollar General	(800) 555 - 1255	Inver Grove Heights		
Dunder Mifflin	2623053233	St. Paul	Bob Belcher	ali.kathleen4@gmail.com
Dunder Mifflin				



Outlook Integration

- Out-of-the-box functionality
- Can be quickly enabled by your Global and System Admins
- Sync Activities between Outlook and CE
 - Tasks
 - Appointments
 - Emails





The screenshot displays the Outlook 'Meeting' interface. The main window shows a meeting invitation for 'Carrie Kuhl' with a title of 'Microsoft Teams Meeting'. The meeting details include the start time (Wed 10/18/2023 at 10:00 AM), end time (Wed 10/18/2023 at 11:30 AM), and location (Microsoft Teams Meeting). A 'Send' button is visible. Below the meeting details, there is a section for 'Join on your computer, mobile app or room device' with a link to 'Click here to join the meeting'. Meeting ID: 226 802 855 663 and Passcode: gCdfXk are also provided. A 'Room Finder' button is located at the bottom right of the meeting details.

On the right side, a 'Dynamics 365' panel is open, showing the user profile for 'Carrie Kuhl'. The panel includes a 'User' section with the name 'Carrie Kuhl', title 'Consultant', and primary email 'carrie.kuhl@stoneridgesoftwa...'. The business unit is 'stoneridgesoftware'. A notification at the top of the panel states 'Attendees were added'.



Outlook Integration

 You haven't sent this meeting invitation yet.

- 
-
-

Start time: All day Time zone


End time:

Microsoft Teams meeting


Join on your computer, mobile app or room device
[Click here to join the meeting](#)


Meeting ID: 226 802 855 663
Passcode: gCdfXk
[Download Teams](#) | [Join on the web](#)


Sales Copilot

 **New event**

Highlights Dynamics 365

 Add someone.g@sample.com as a contact to Dynamics 365.

Opportunity summary 



There was a problem getting this info



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[Edit your interests](#)

MODULE
Responsible Generative AI

🕒 50 min ★★★★★ 4.7 (3,471)

Azure • AI Engineer • Intermediate




⊕ Add

LEARNING PATH
Get started with Microsoft data analytics

🕒 1 hr 16 min

Microsoft Power Platform • Data Analyst • Intermediate




⊕ Add

MODULE
Get data with Power BI Desktop

🕒 1 hr 15 min ★★★★★ 4.7 (38,274)

Microsoft Power Platform • Business Analyst • Intermediate



⊕ Add

LEARNING PATH
Prepare data for analysis with Power BI

🕒 4 hr 2 min

Microsoft Power Platform • Data Analyst • Intermediate




⊕ Add

LEARNING PATH
Create bots with Power Virtual Agents

🕒 3 hr 48 min

Microsoft Power Platform • App Maker • Intermediate




⊕ Add

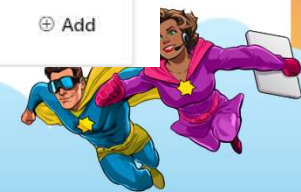
MODULE
Use AI Builder in Power Automate

🕒 1 hr ★★★★★ 4.7 (3,617)

Microsoft Power Platform • App Maker • Intermediate



⊕ Add



Certifications

Filter

Clear all

Products

Find a product

- Azure
- Dynamics 365
- Microsoft 365
- Microsoft Defender
- Microsoft Endpoint Manager
- Microsoft Entra
- Microsoft Intune
- Microsoft Power Platform
- Microsoft Teams

Roles

- Administrator
- App Maker
- Business Analyst
- Business Owner
- Business User
- Data Analyst

Roles

- Administrator
- App Maker
- Business Analyst
- Business Owner
- Business User
- Data Analyst
- Developer
- DevOps Engineer
- Functional Consultant













Levels

- Beginner
- Intermediate
- Advanced

Search Search

Business User ✕

77 results Sort by: Alphabetical (A-Z) ▾

<p>CERTIFICATION</p> <p>Microsoft 365 Certified: Fundamentals</p> <p>ExamMS-900 Microsoft 365 • Business User • Beginner</p> <p> Add</p>	<p>EXAM</p> <p>Exam 77-730: Microsoft Access (Office 2016)</p> <p>Office • Business User • Intermediate</p> <p> Add</p>	<p>EXAM</p> <p>Exam 77-424: Microsoft Access 2013</p> <p>Office • Business User • Beginner</p> <p> Add</p>
<p>EXAM</p> <p>Exam MO-500: Microsoft Access Expert (Office 2019)</p> <p>Office • Business User • Advanced</p> <p> Add</p>	<p>EXAM</p> <p>Exam AZ-900: Microsoft Azure Fundamentals</p> <p>Azure • Administrator • Beginner</p> <p> Add</p>	<p>CERTIFICATION</p> <p>Microsoft Certified: Azure Fundamentals</p> <p>ExamAZ-900 Azure • Administrator • Beginner</p> <p> Add</p>
<p>CERTIFICATION</p> <p>Exam MO-500: Microsoft Access Expert (Office 2019)</p> <p>Office • Business User • Advanced</p> <p> Add</p>	<p>CERTIFICATION</p> <p>Exam AZ-900: Microsoft Azure Fundamentals</p> <p>Azure • Administrator • Beginner</p> <p> Add</p>	<p>CERTIFICATION</p> <p>Microsoft Certified: Azure Fundamentals</p> <p>ExamAZ-900 Azure • Administrator • Beginner</p> <p> Add</p>
<p>CERTIFICATION</p> <p>Microsoft Certified: Dynamics 365 Fundamentals (CRM)</p> <p>ExamMB-910 Dynamics 365 • Business Owner • Beginner</p> <p> Add</p>	<p>CERTIFICATION</p> <p>Microsoft Certified: Dynamics 365 Fundamentals (ERP)</p> <p>ExamMB-920 Dynamics 365 • Business Owner • Beginner</p> <p> Add</p>	<p>CERTIFICATION</p> <p>Microsoft Certified: Power BI Data Analyst Associate</p> <p>ExamPL-300 Microsoft Power Platform • Data Analyst • Intermediate</p> <p> Add</p>
<p>CERTIFICATION</p>	<p>CERTIFICATION</p>	<p>CERTIFICATION</p>



Certifications

- MB-910: Microsoft Dynamics 365 Fundamentals (CRM)
- PL-900: Power Platform Fundamentals
- PL-200: Power Platform Functional Consultant Associate
- MB-210: Sales Functional Consultant Associate
- MB-220: Customer Insights (Journeys) Functional Consultant
- MB-230: Customer Service Functional Consultant Associate
- MB-240: Field Service Functional Consultant Associate



Other Admin Tips

- Look up sessions from other presenters



**Time to wrap it
up!**



What did we cover?

- Why this topic?
- Introduction to the Power Platform
- Dynamics 365 Overview
- Environment Best Practices
- Trial Environments
- Maker Portal
- Solutions
- Automation can be Simple
- Customize Choices
- Grid Controls
- Data Relationships
- Searching Techniques
- Create Your Own Views
- Collaborate with Teams
- Outlook Integration
- Love Microsoft Learn
- Certifications

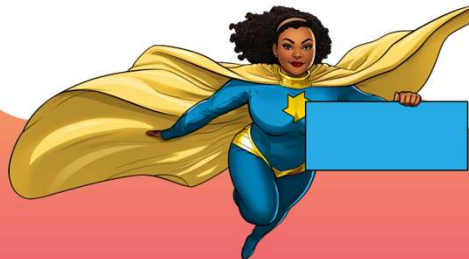
Let's Connect



Thanks for attending!



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MAY 2024

