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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

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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?

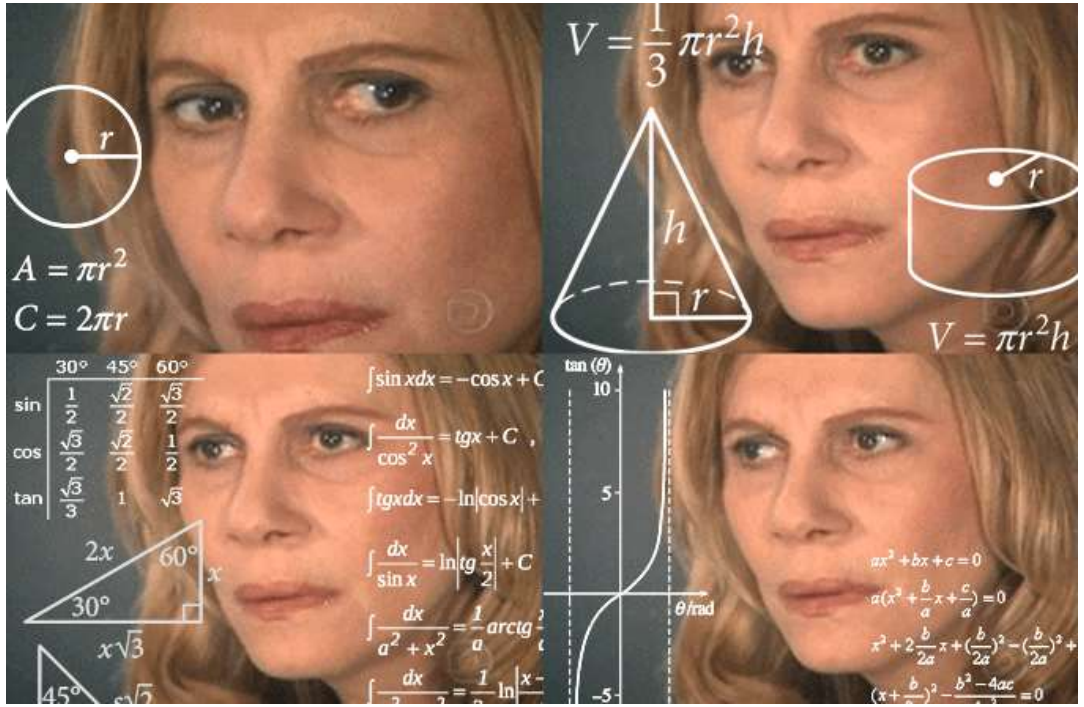
- 0-1 year
- 2-5 years
- 6-10 years
- 10+ years

Which product is your primary focus?

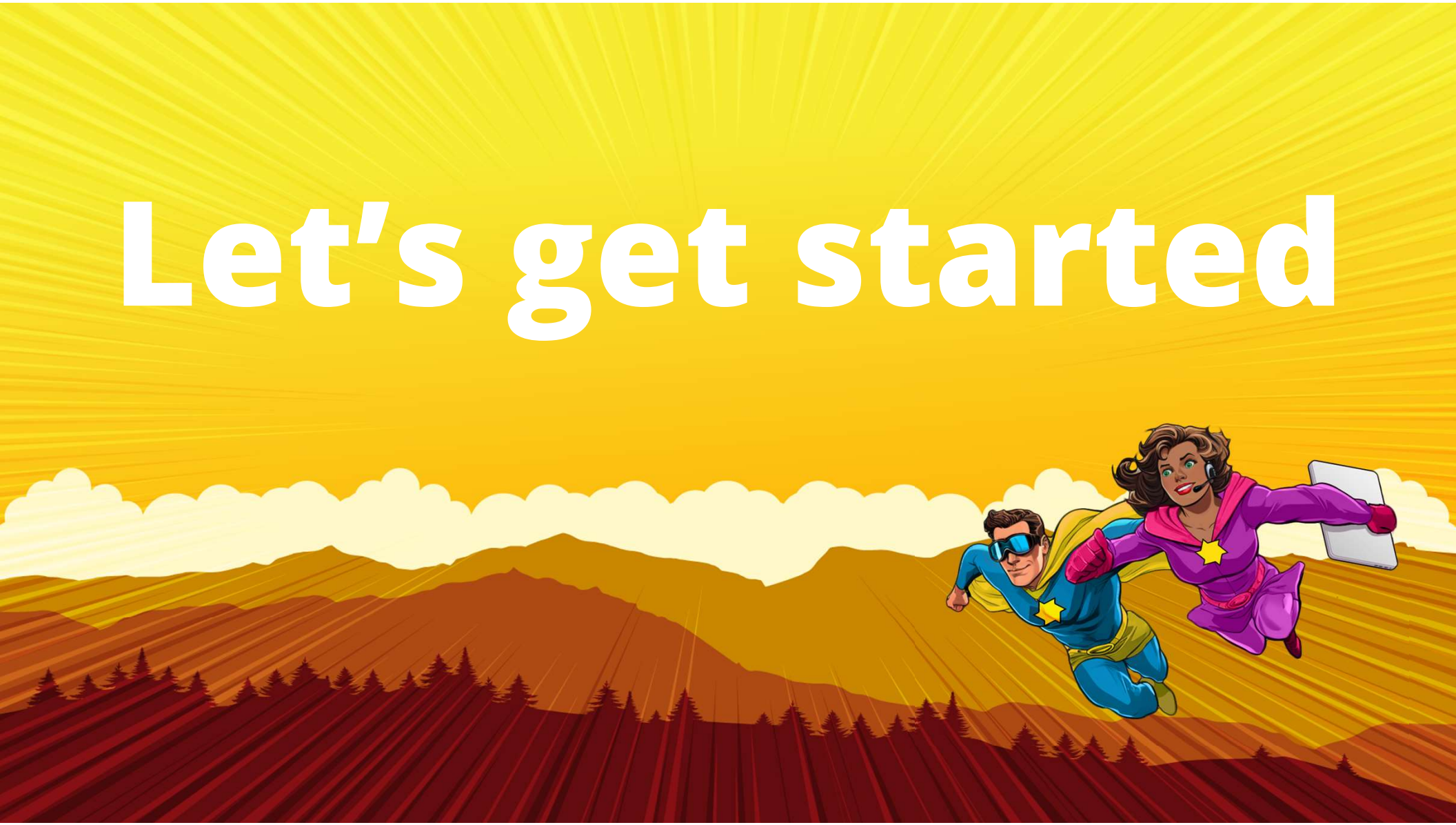
Agenda

- 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

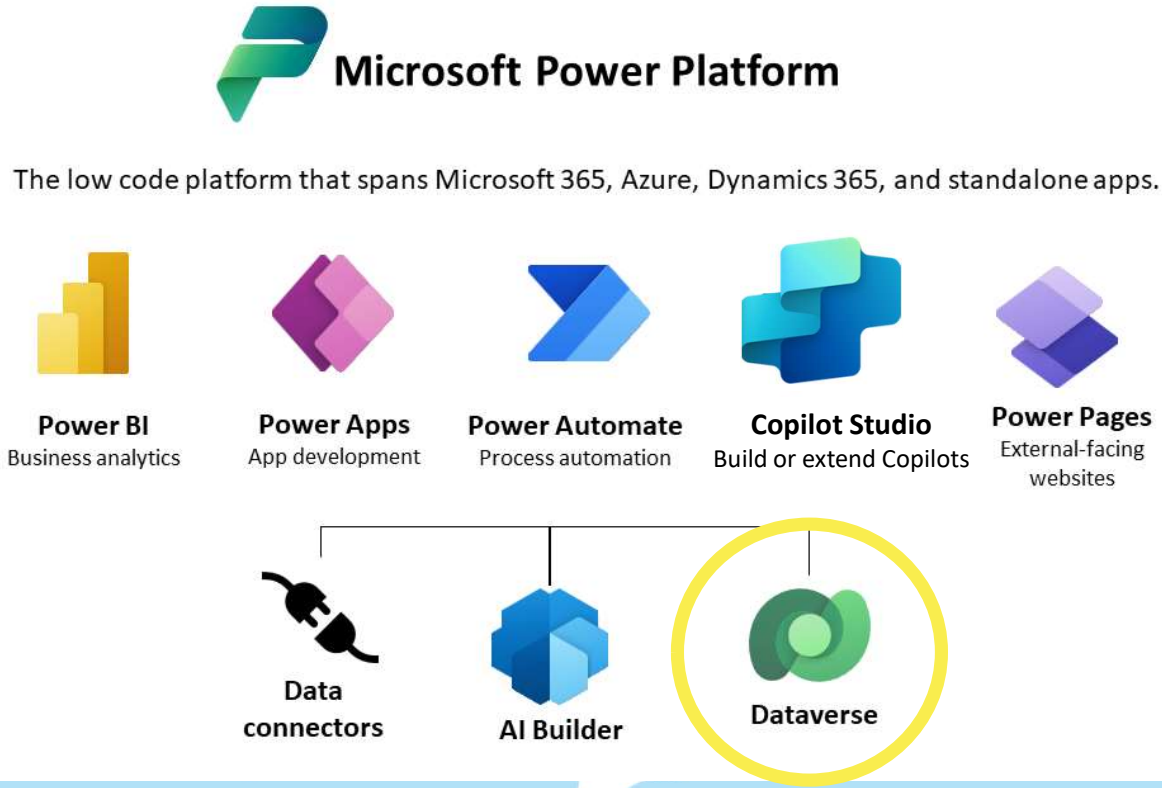
Why this topic?



Let’s get started



Microsoft Power Platform



Dataverse

Relational Database

Cloud-based

Robust security

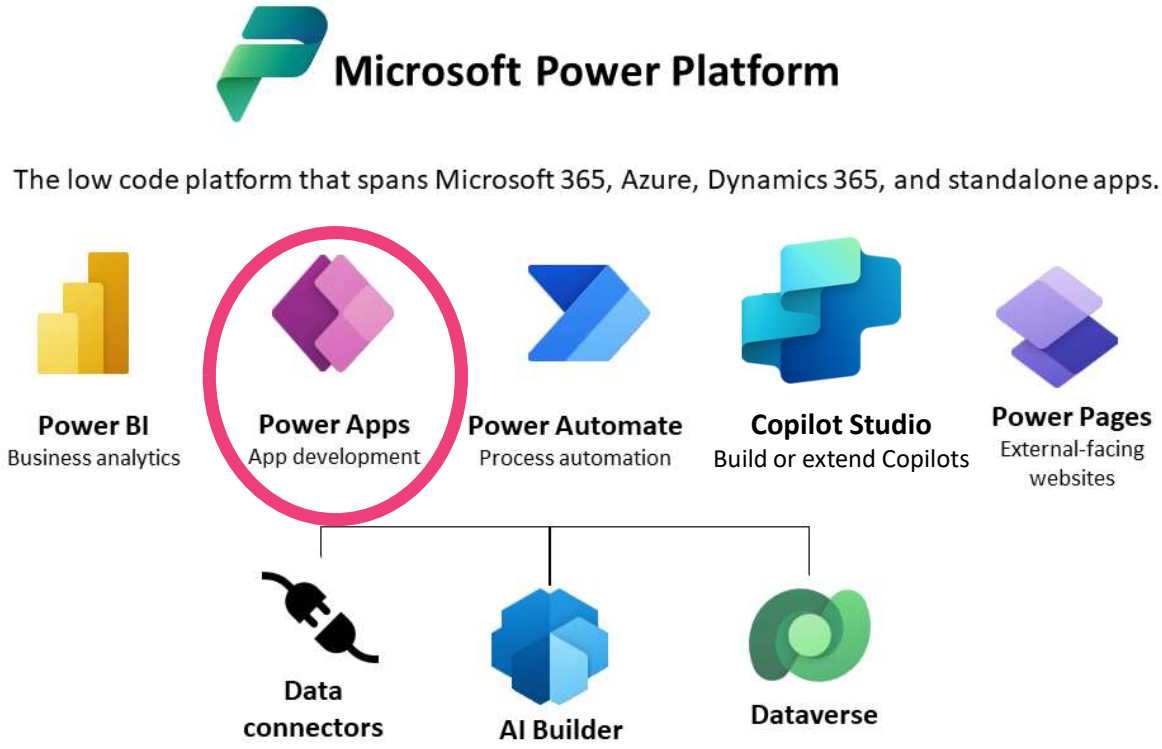
Supports various data types: files, images, blob

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


Microsoft Power Platform
The low code platform that spans Microsoft 365, Azure, Dynamics 365, and standalone apps.
Power BI
Business analytics
Power Apps
App development
Power Automate
Process automation
Copilot Studio
Build or extend Copilots
Power Pages
External-facing websites
Data connectors
AI Builder
Dataverse

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Power Apps

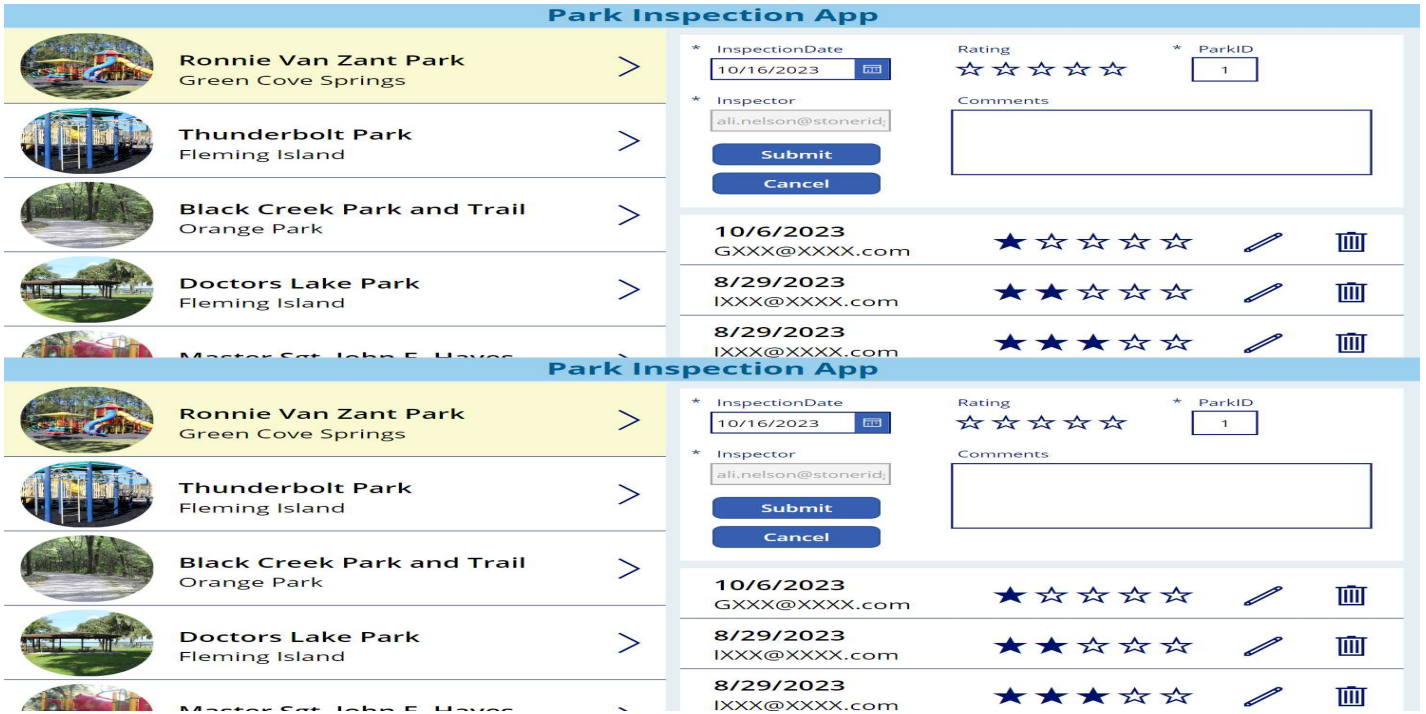
Canvas Apps

- 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
Thunderbolt Park
Fleming Island
Black Creek Park and Trail
Orange Park
Doctors Lake Park
Fleming Island
* InspectionDate
10/16/2023
Rating
* ParkID
1
* Inspector
ali.nelson@stonerid
Comments
Submit
Cancel
10/6/2023
GXXX@XXXX.com
8/29/2023
IXXX@XXXX.com
8/29/2023
IXXX@XXXX.com
Park Inspection App
Ronnie Van Zant Park
Green Cove Springs
Thunderbolt Park
Fleming Island
Black Creek Park and Trail
Orange Park
Doctors Lake Park
Fleming Island
* InspectionDate
10/16/2023
Rating
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1
* Inspector
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Comments
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Cancel
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GXXX@XXXX.com
8/29/2023
IXXX@XXXX.com
8/29/2023
IXXX@XXXX.com

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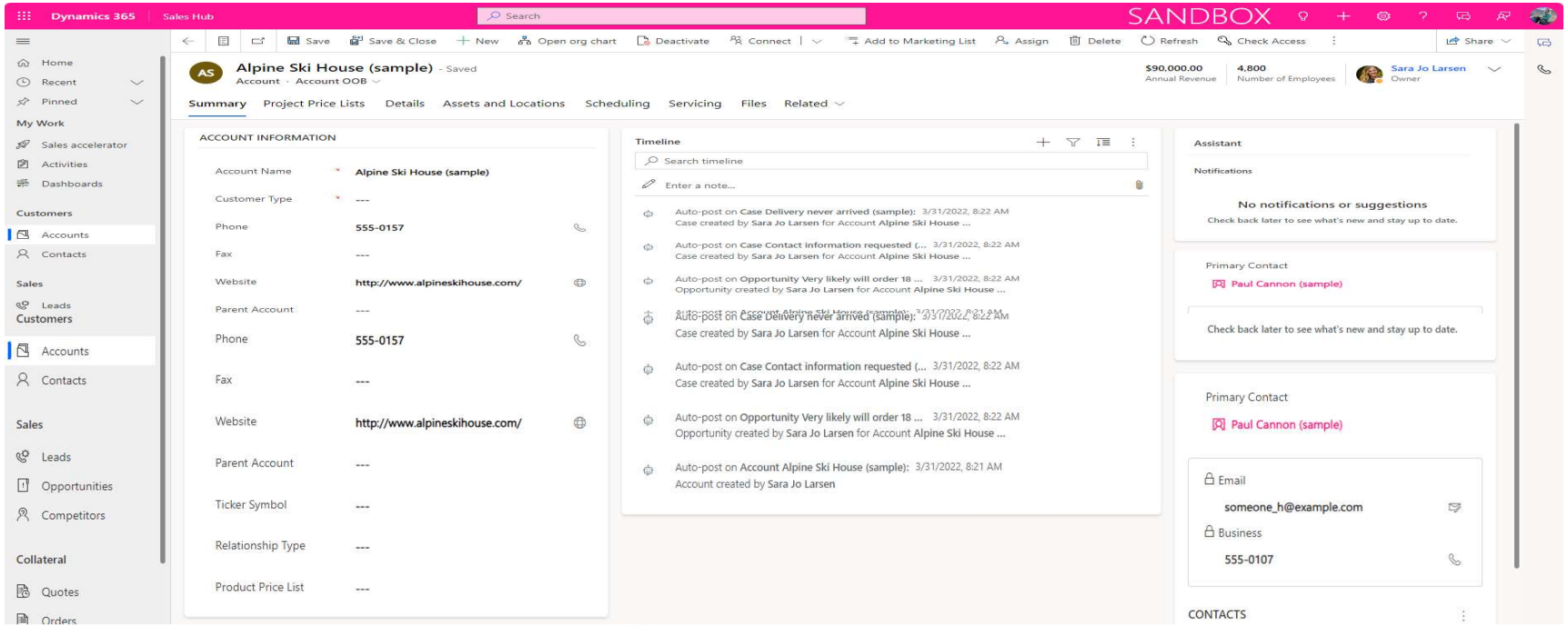
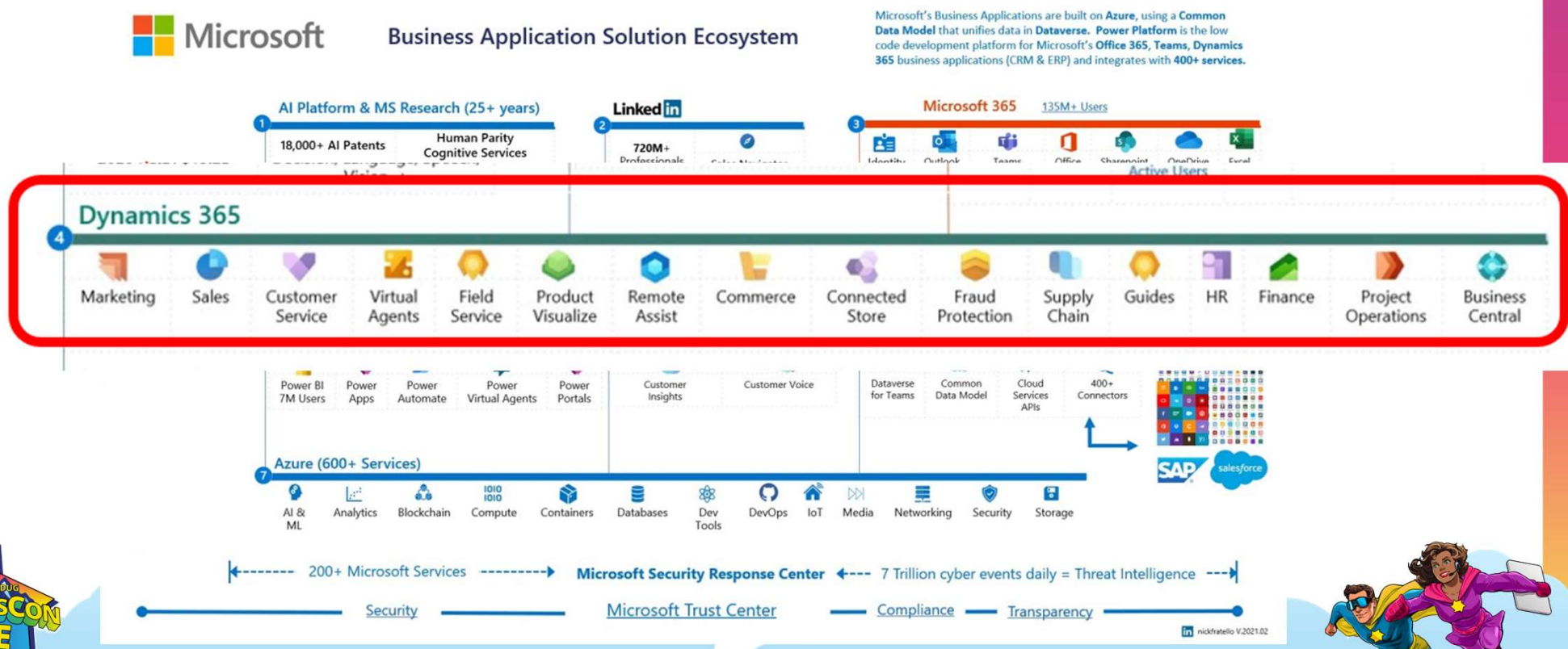
Model-Driven App



Where does Dynamics 365 fit in?



D365 Customer Engagement (CE) Apps

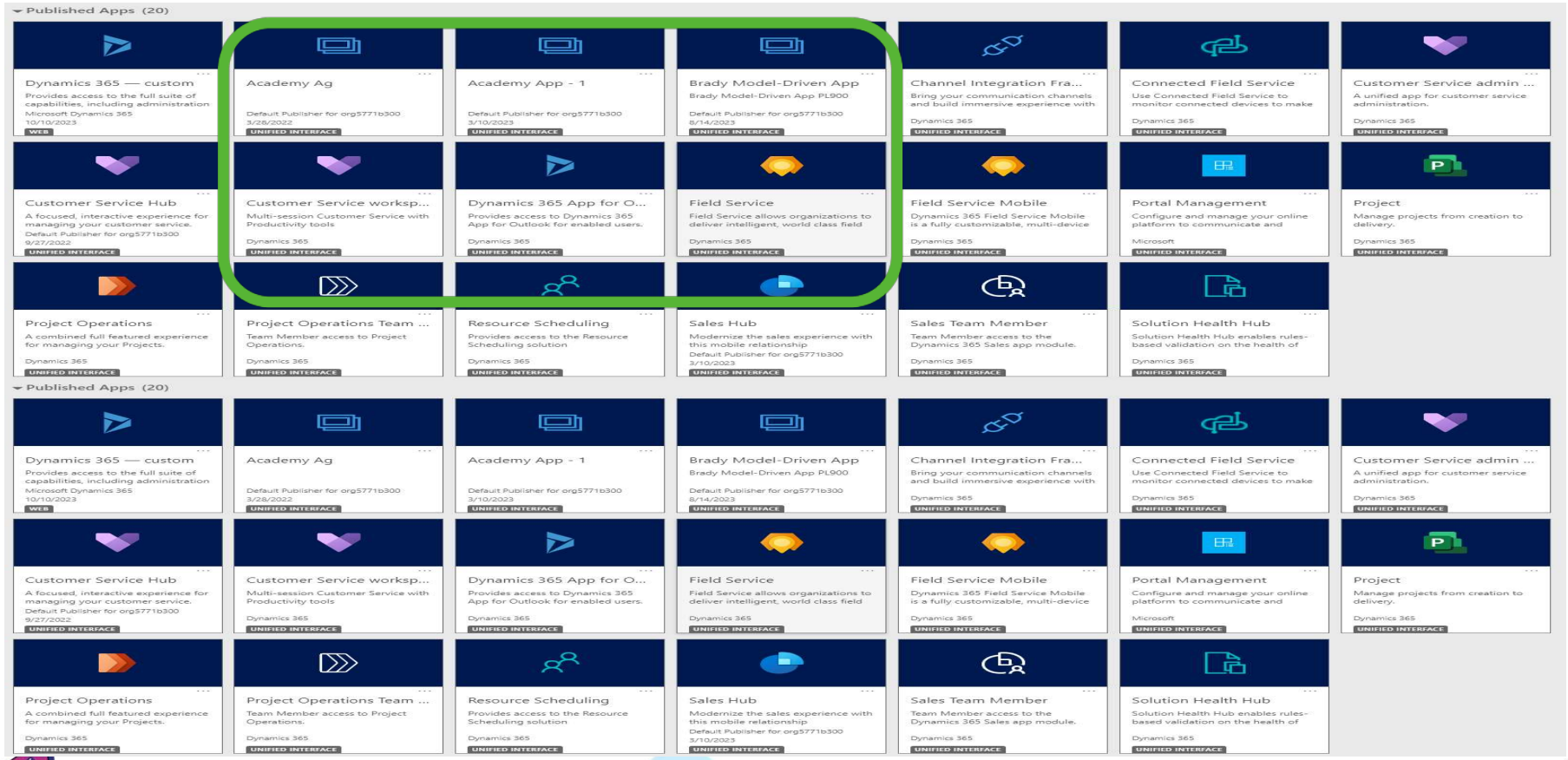
CE apps are model-driven apps

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
10/10/2023
WEB
Academy Ag
Default Publisher for org5771b300
3/28/2022
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
8/14/2023
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
Published Apps (20)

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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

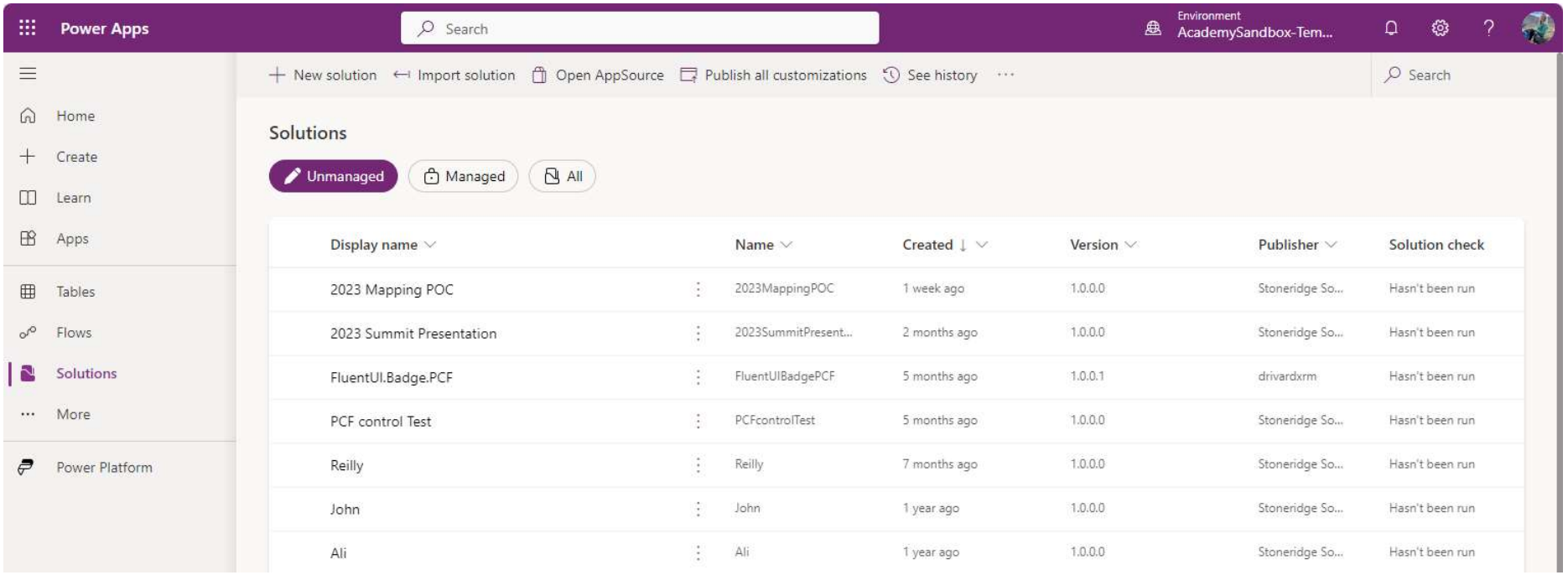
PROD

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
Search
Environment
AcademySandbox-Tem...
New solution
Import solution
Open AppSource
Publish all customizations
See history
Search
Home
Create
Learn
Apps
Tables
Flows
Solutions
More
Power Platform
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

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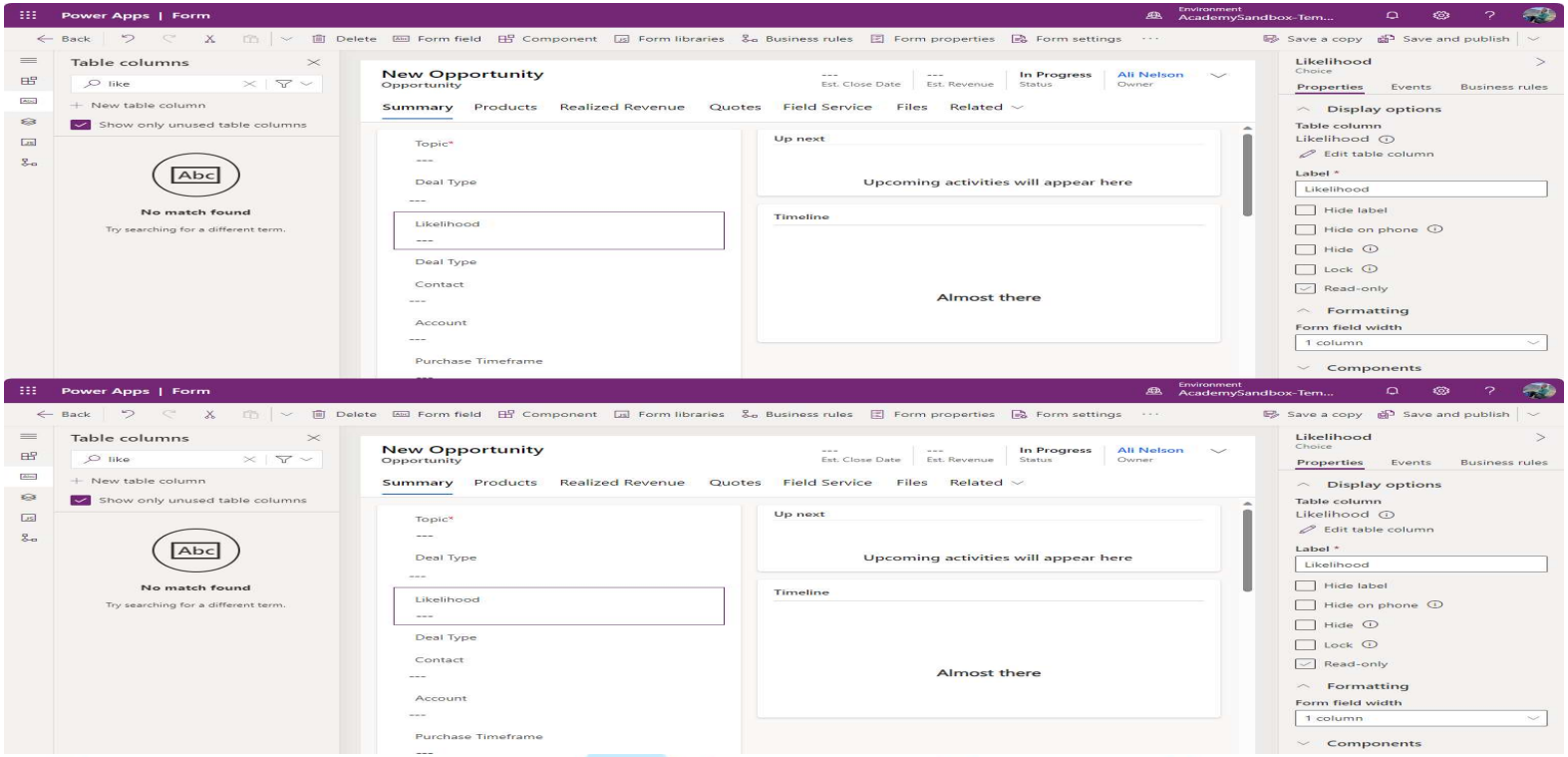
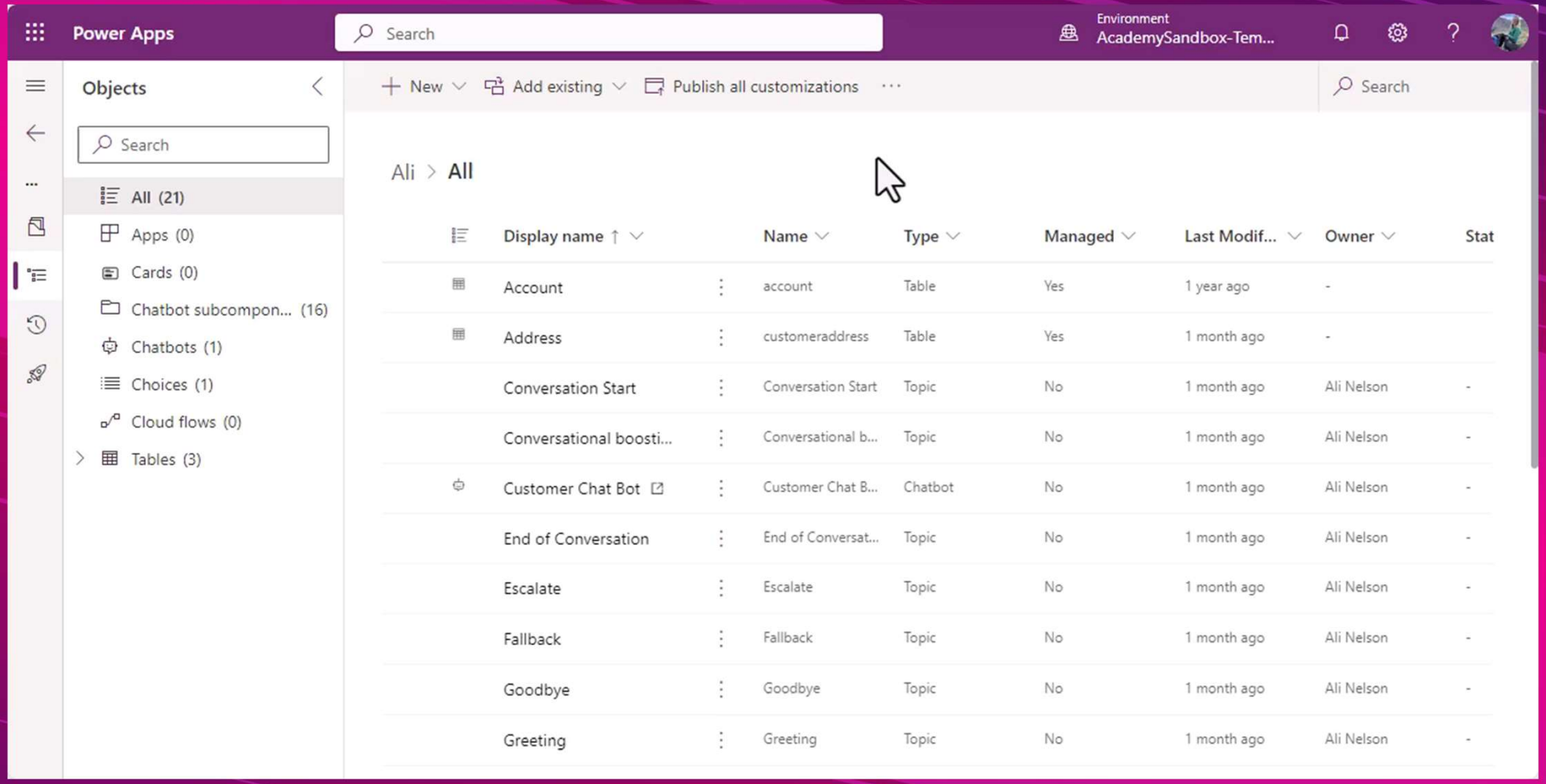
Form & View Customizations

Maker Portal

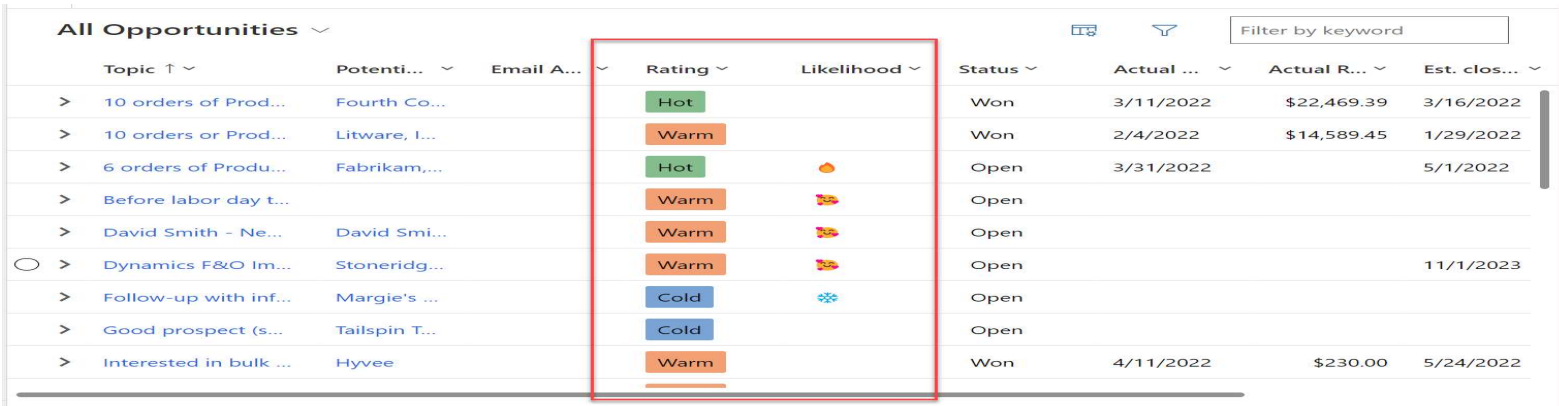
make.powerapps.com



Maker Portal – Create a Column



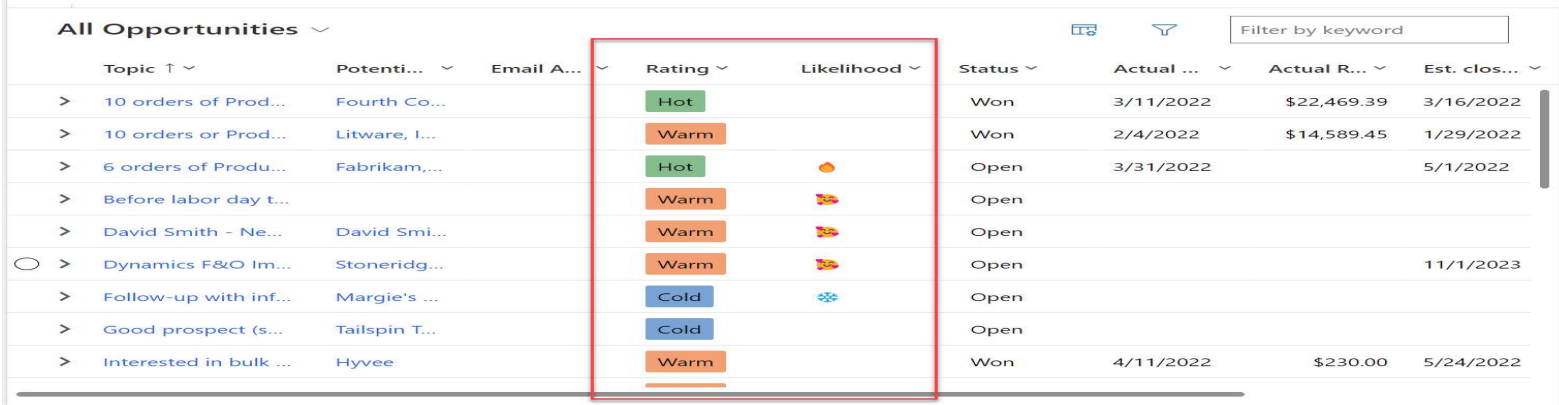
Customize Choices



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, I...		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



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10 orders or Prod...	Litware, I...		Warm		Won	2/4/2022	$14,589.45	1/29/2022
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Before labor day t...			Warm		Open			
David Smith - Ne...	David Smi...		Warm		Open			
Dynamics F&O Im...	Stoneridg...		Warm		Open			11/1/2023
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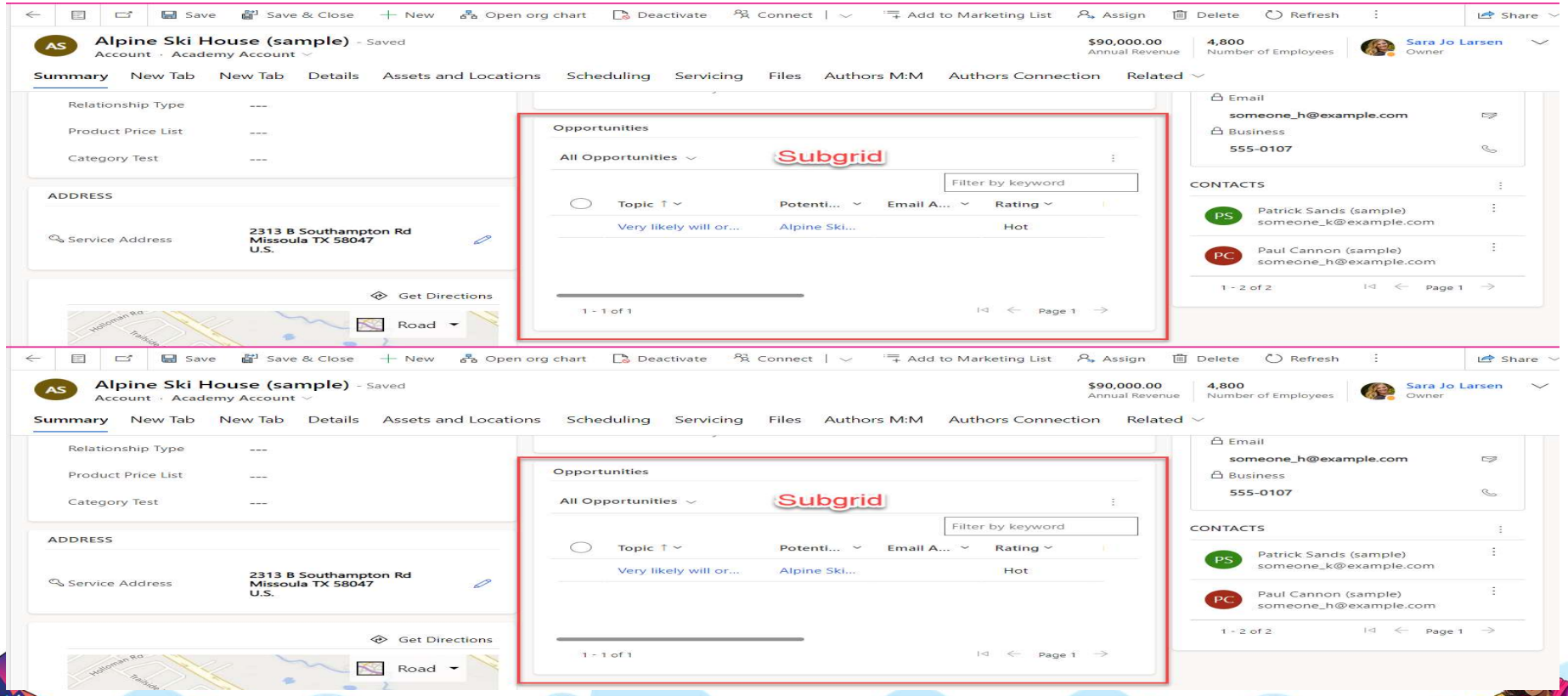
Good prospect (s...	Tailspin T...		Cold		Open			
Interested in bulk ...	Hyvee		Warm		Won	4/11/2022	$230.00	5/24/2022

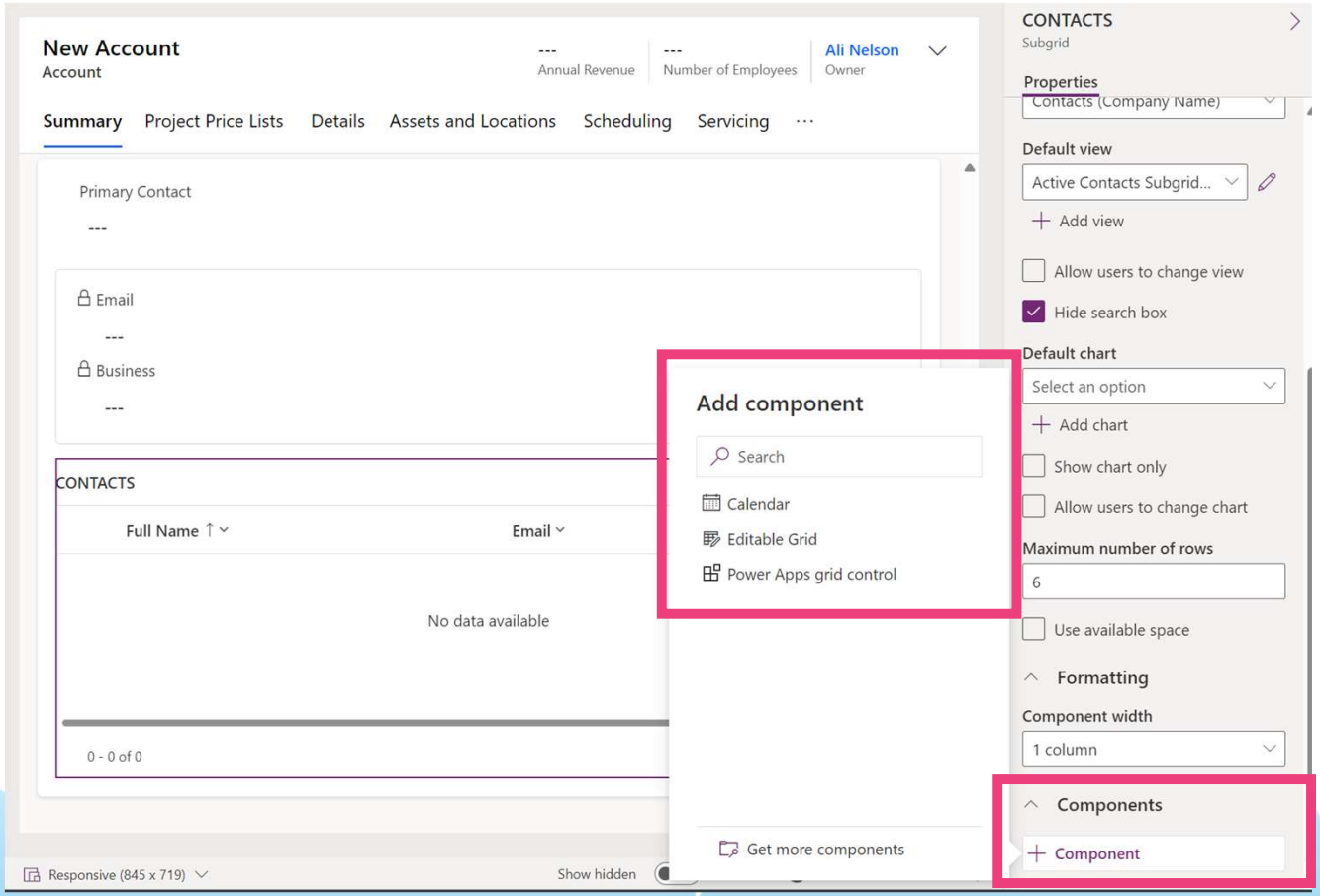
Grid Controls



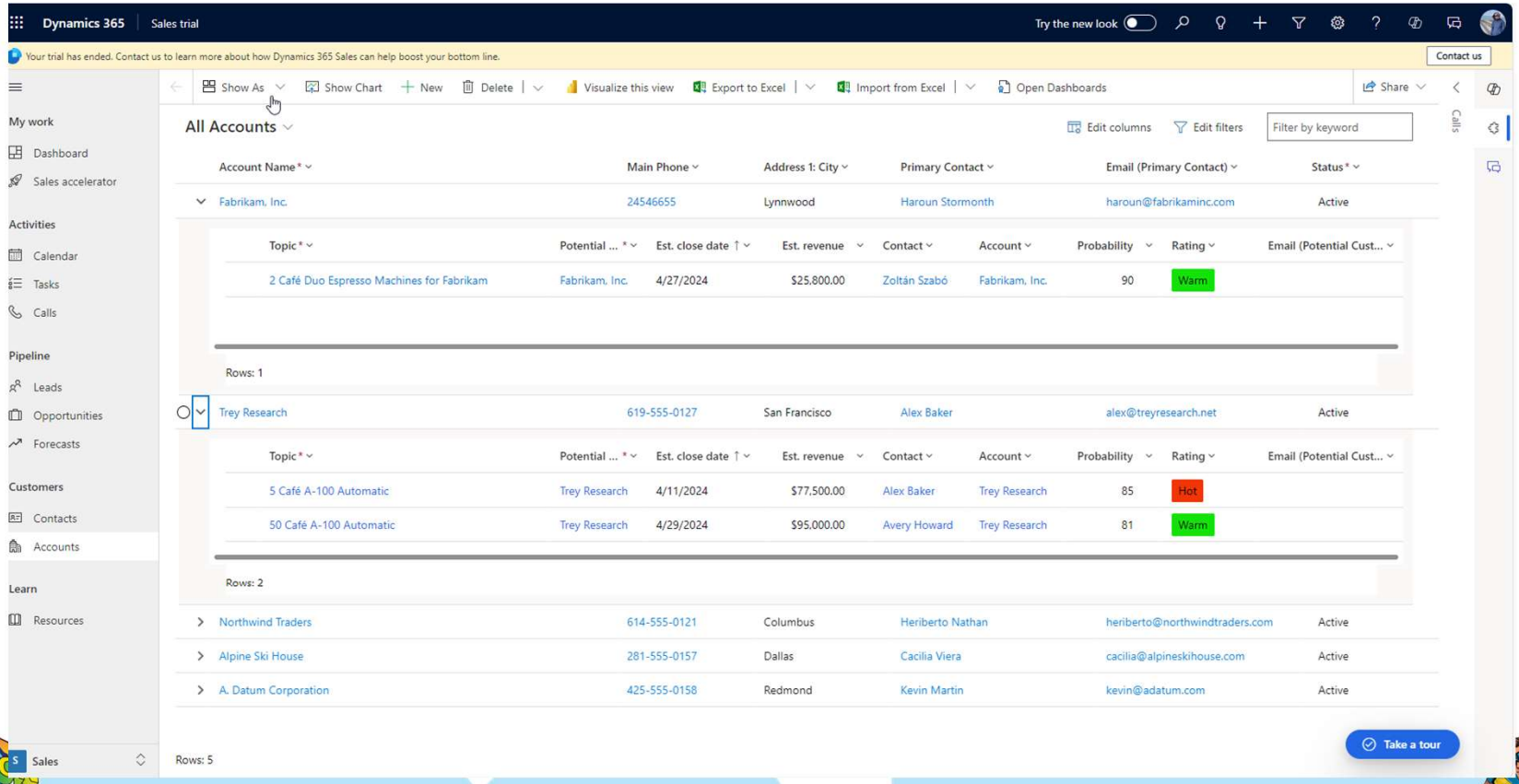
Grid Controls

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

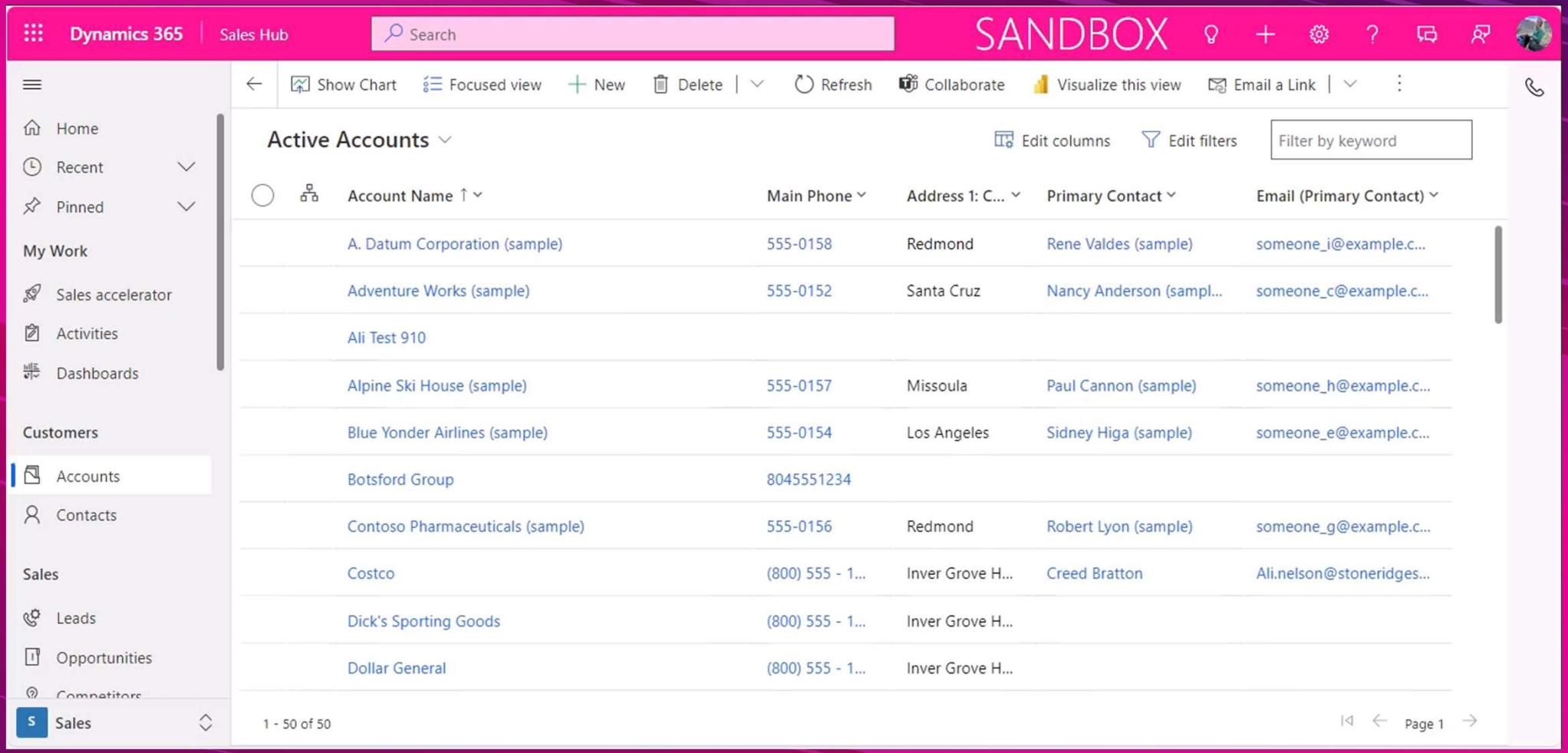
Grid Controls



Nested Grids with Child Items



Modify Views

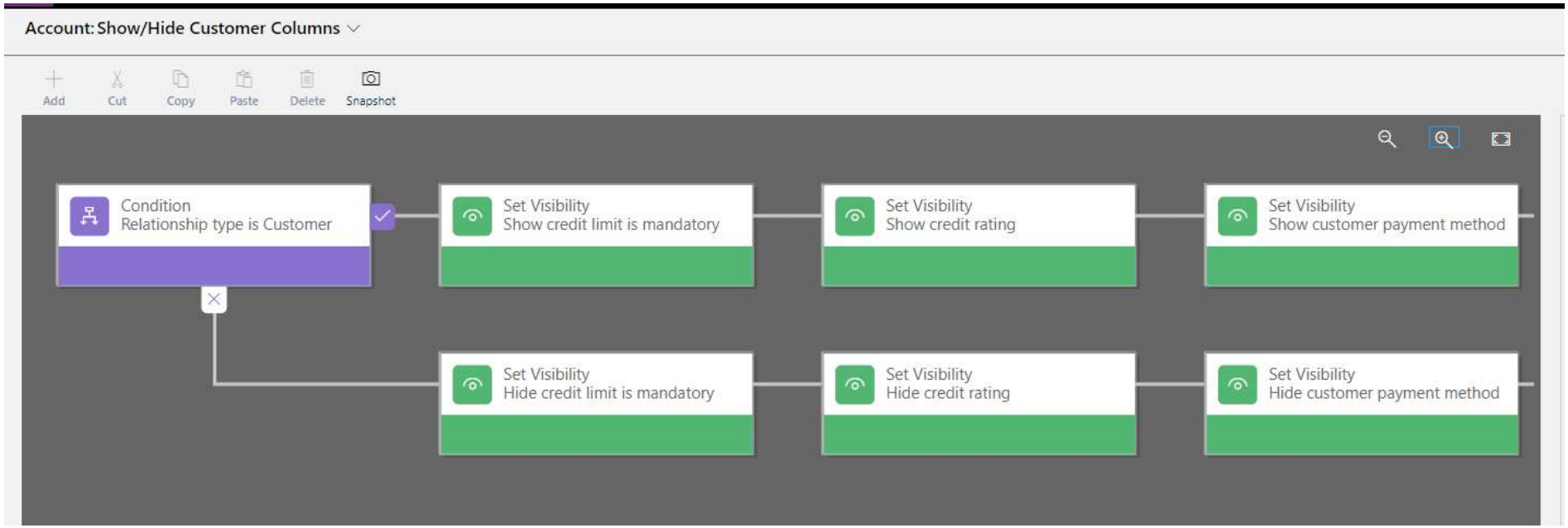


Automation

Automation can be Simple

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

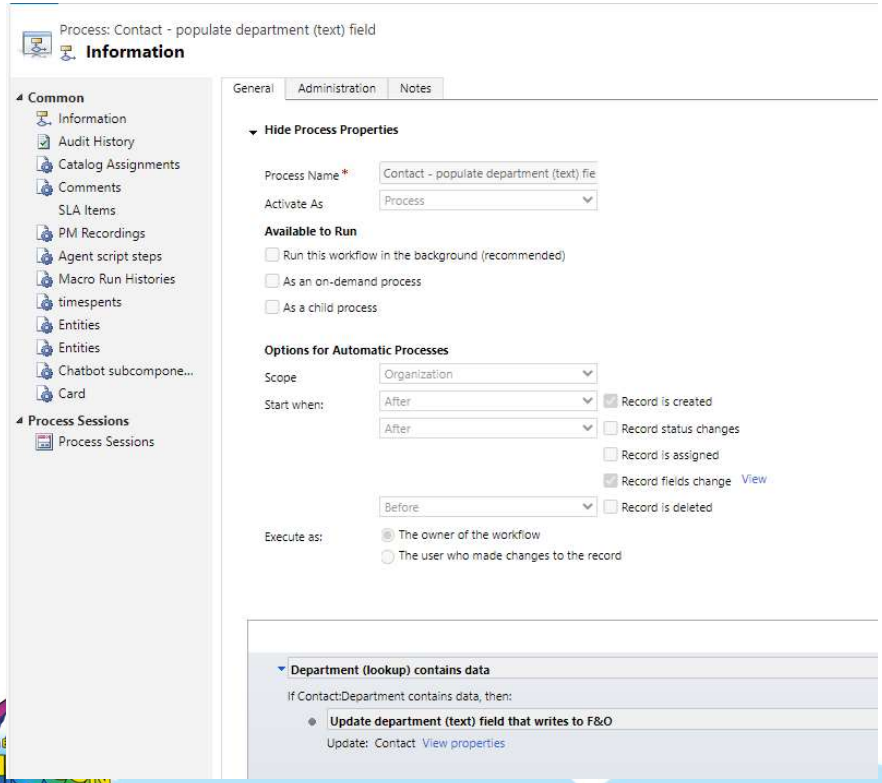
Business Rules

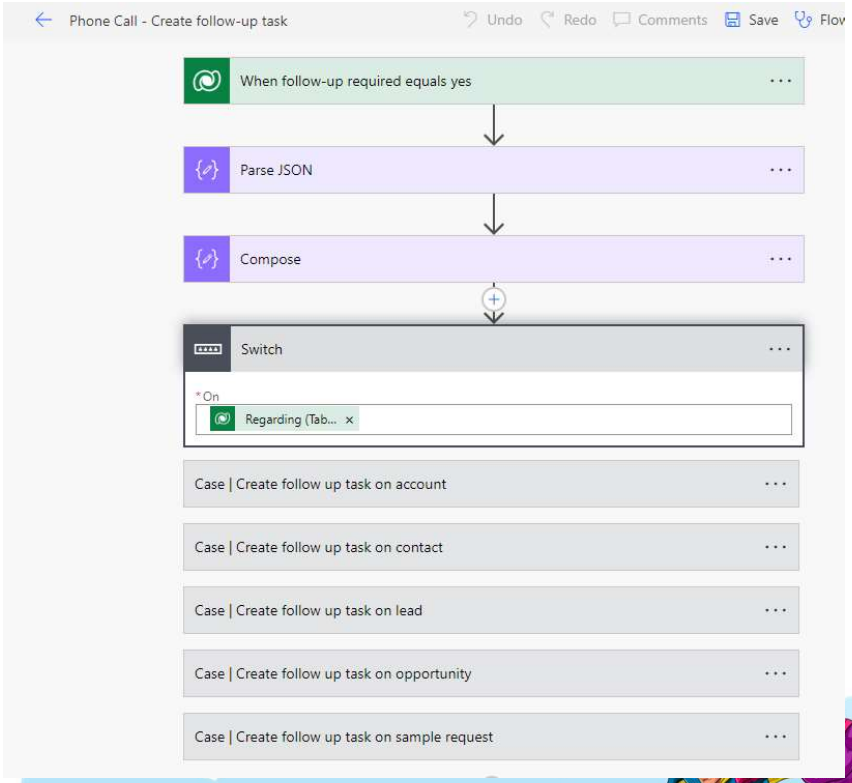


Business Rules Types

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

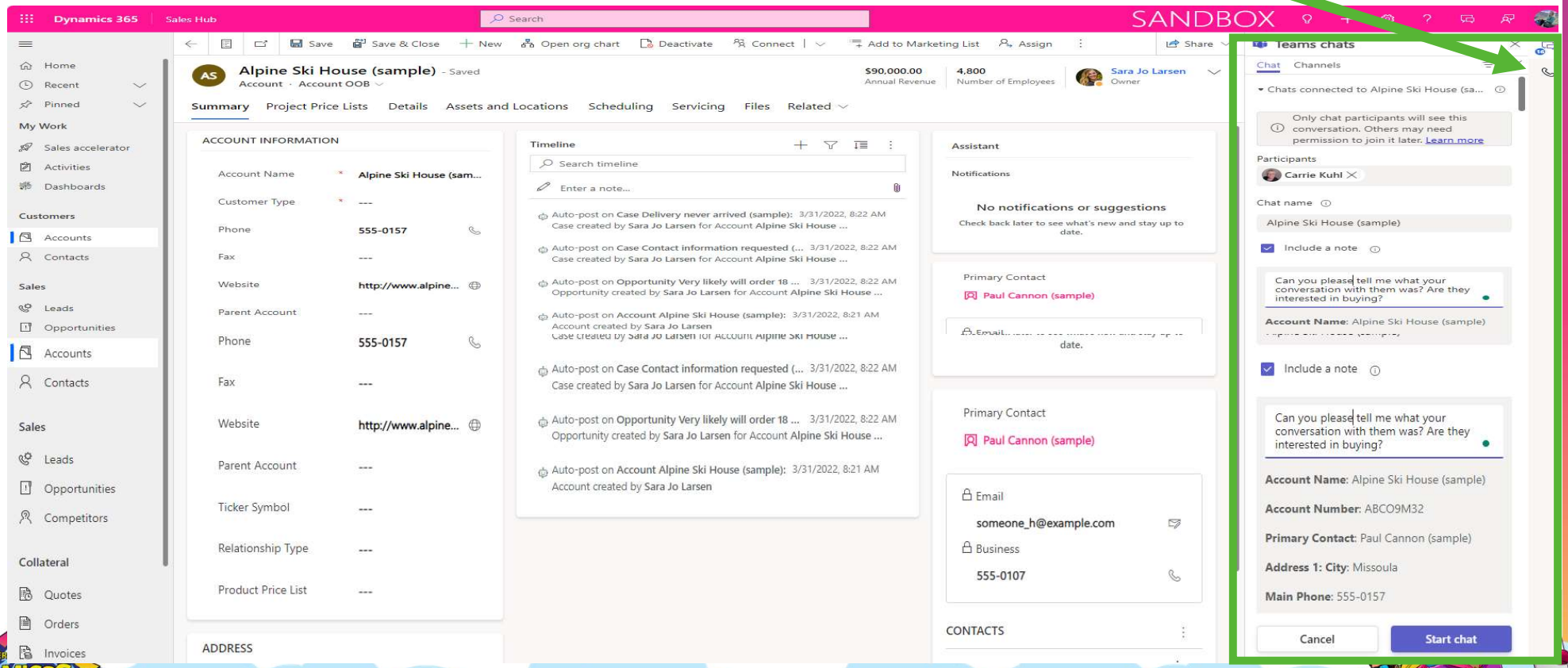
Workflows & Power Automate

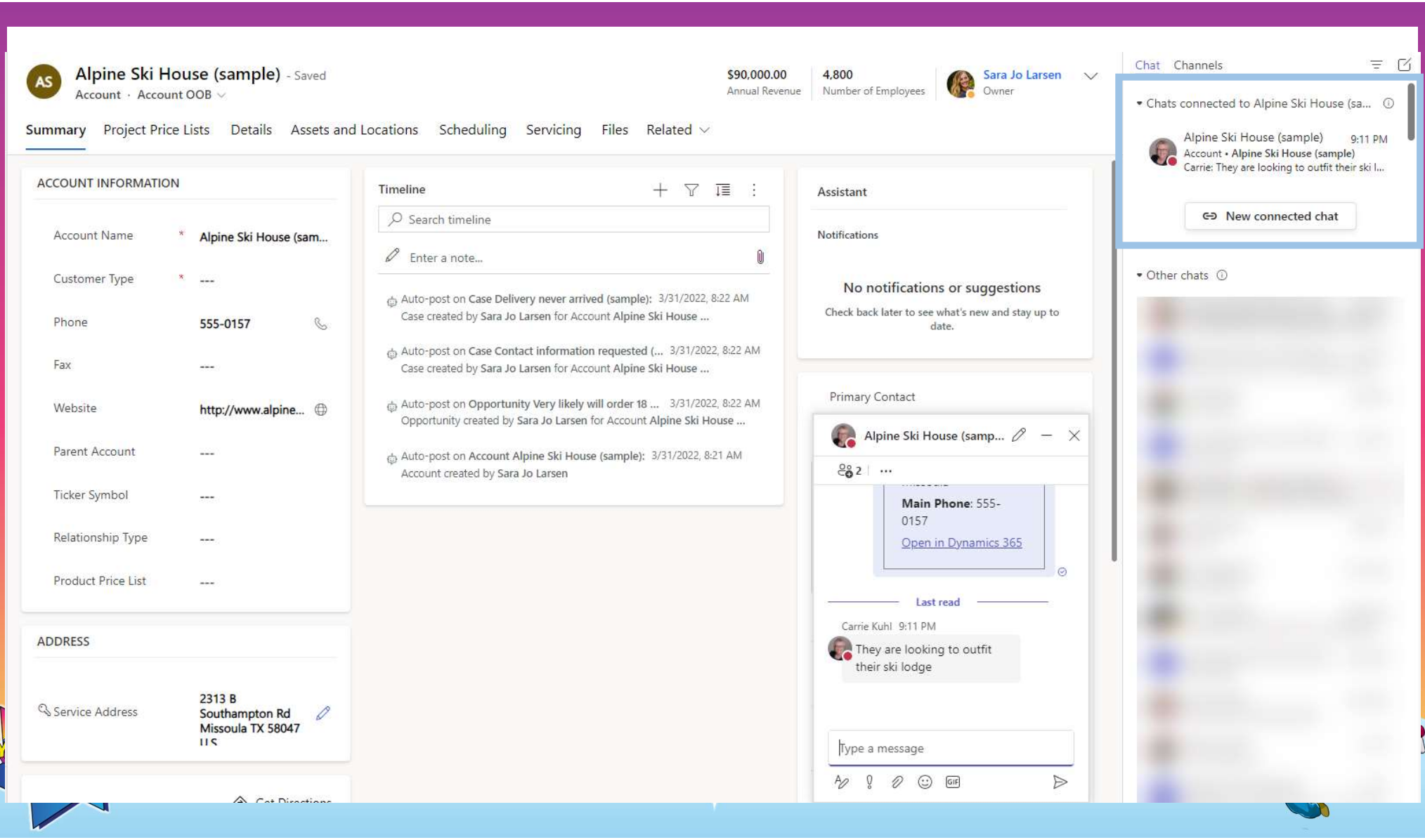




Productivity Tips

Enable Teams Chat in CE




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 (sam...
Customer Type

Phone
555-0157
Fax

Website
http://www.alpine...
Parent Account

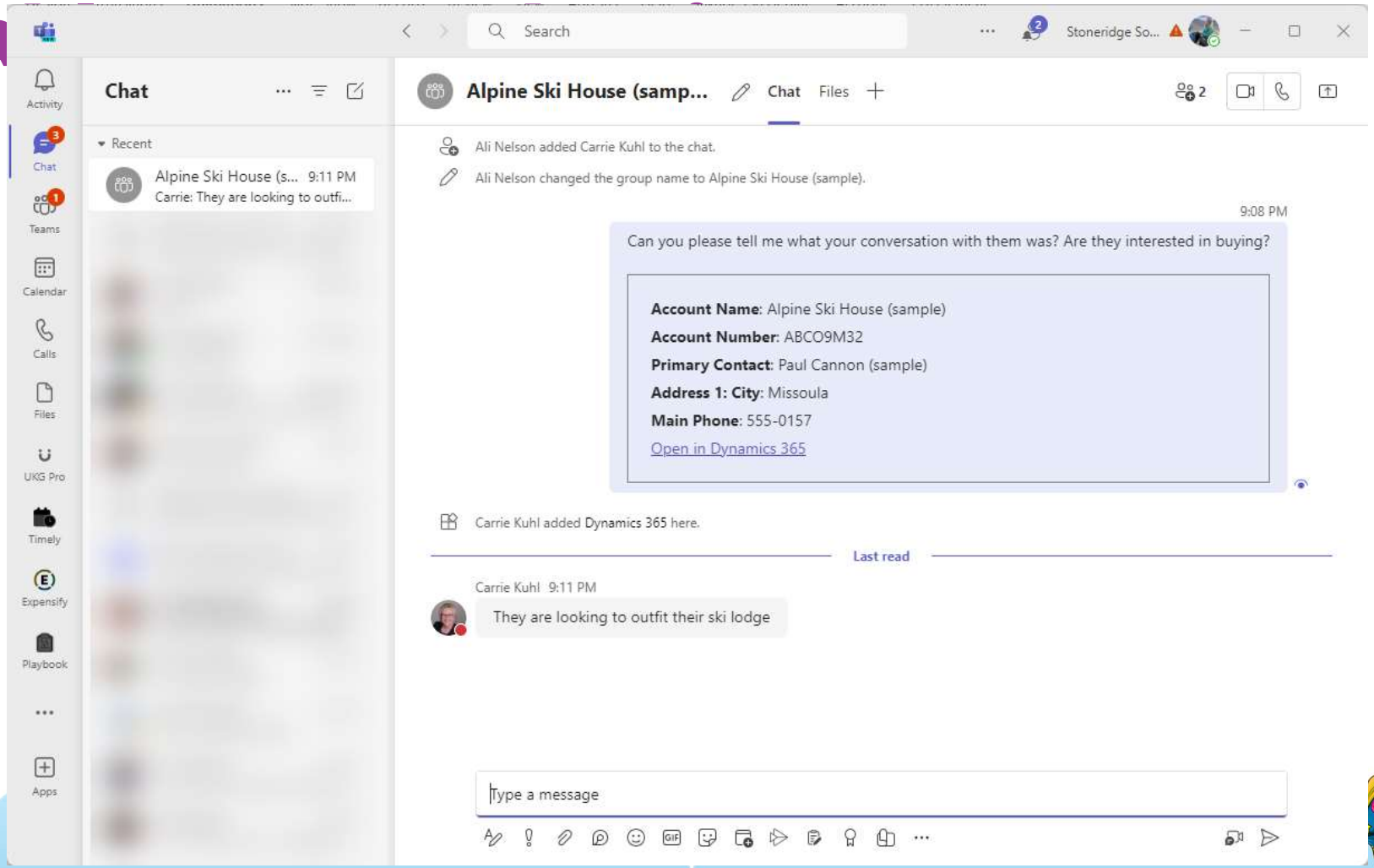
Ticker Symbol

Relationship Type

Product Price List

ADDRESS
Service Address
2313 B Southampton Rd Missoula TX 58047 US
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...
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
Chat
Channels
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

Ena


Search
Stoneridge So...
Chat
Activity
Chat
Teams
Calendar
Calls
Files
UKG Pro
Timely
Expensify
Playbook
Apps
Recent
Alpine Ski House (s... 9:11 PM
Carrie: They are looking to outfi...
Alpine Ski House (samp...
Chat
Files
2
Ali Nelson added Carrie Kuhl to the chat.
Ali Nelson changed the group name to Alpine Ski House (sample).
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

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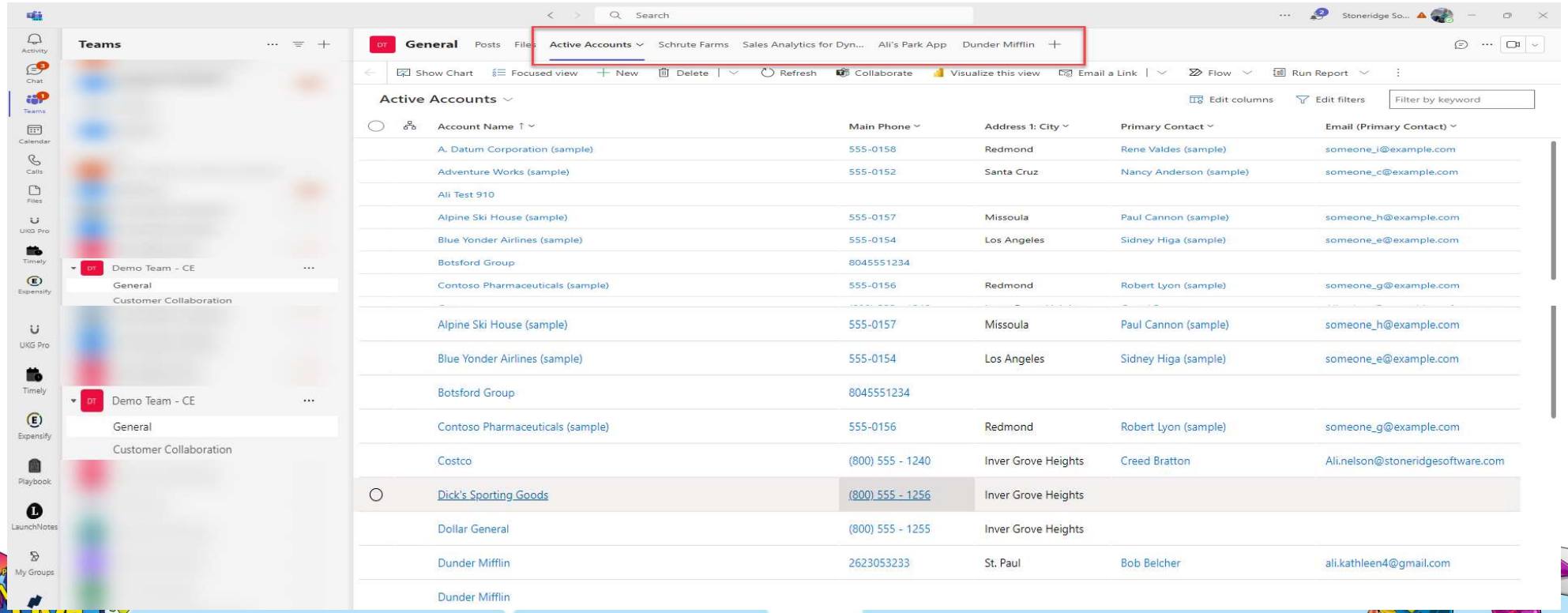
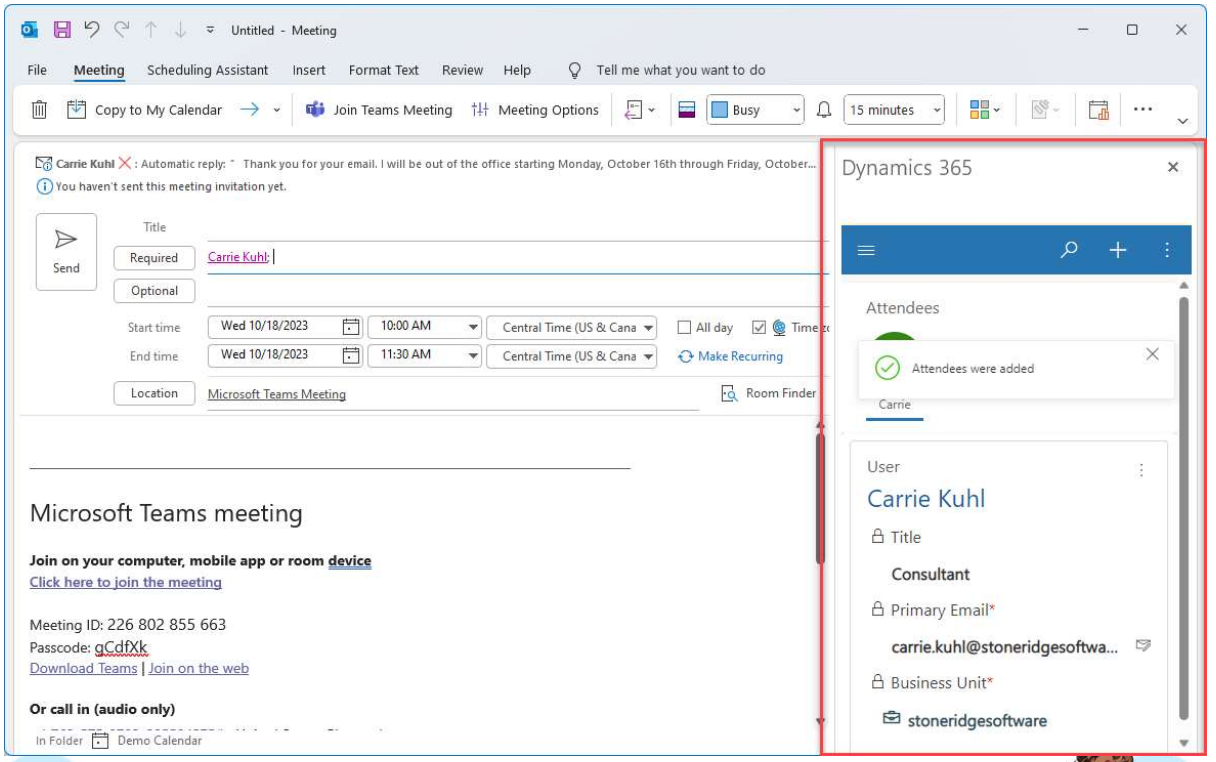
Use Teams as a Home Base

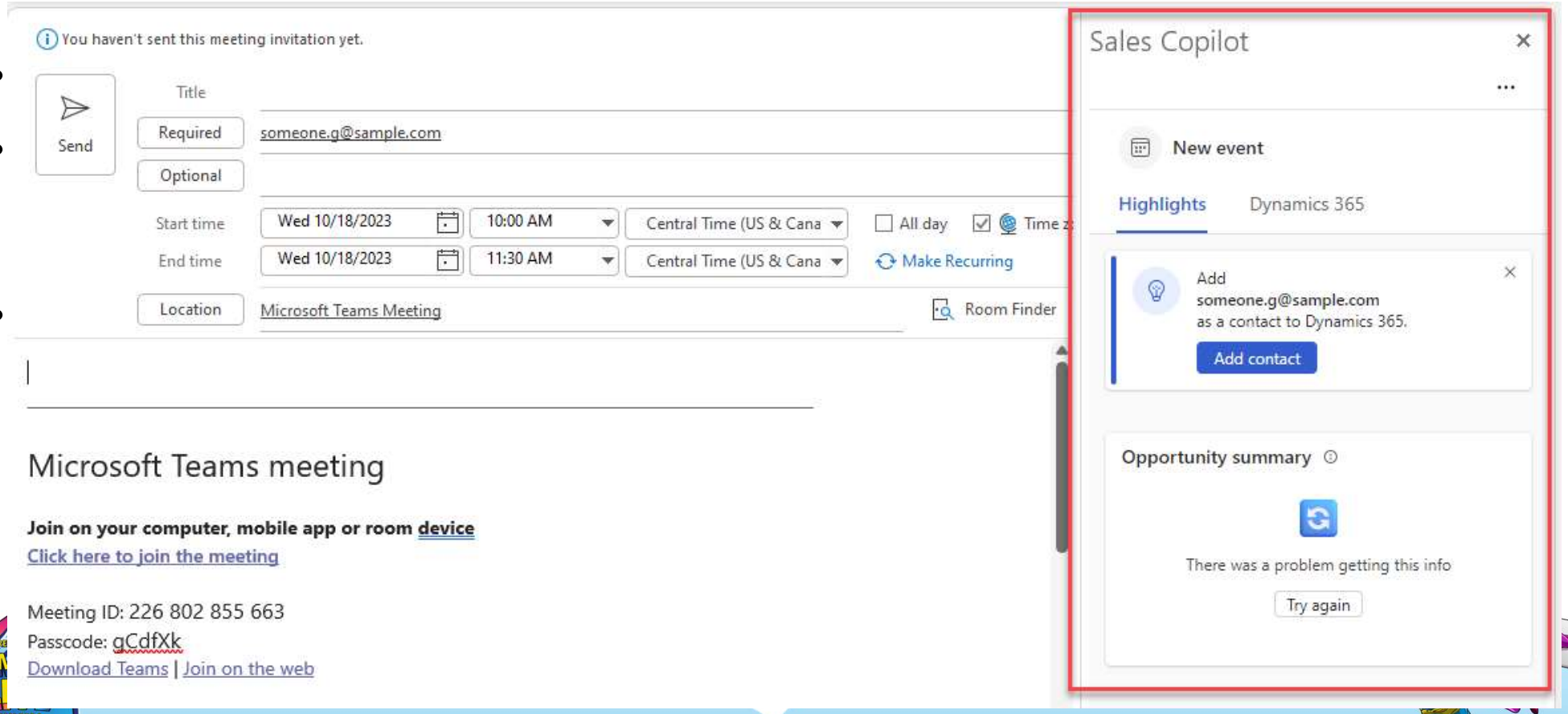


Outlook Integration

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

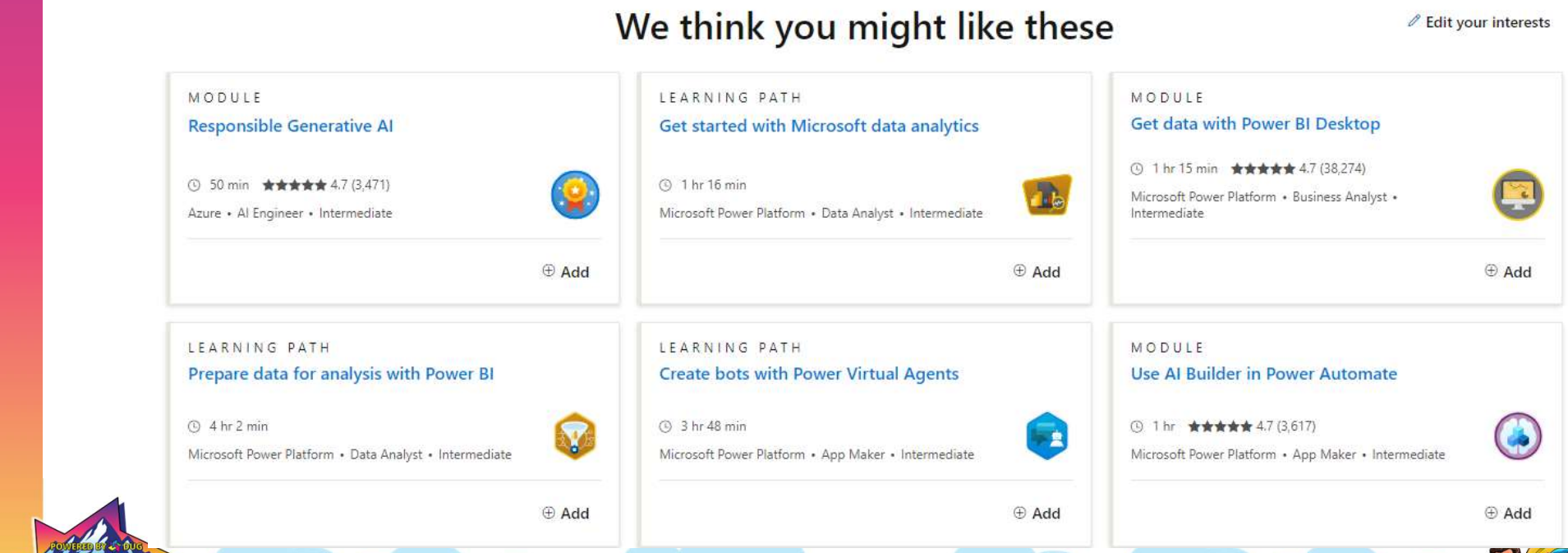


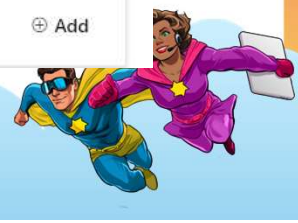
Outlook Integration



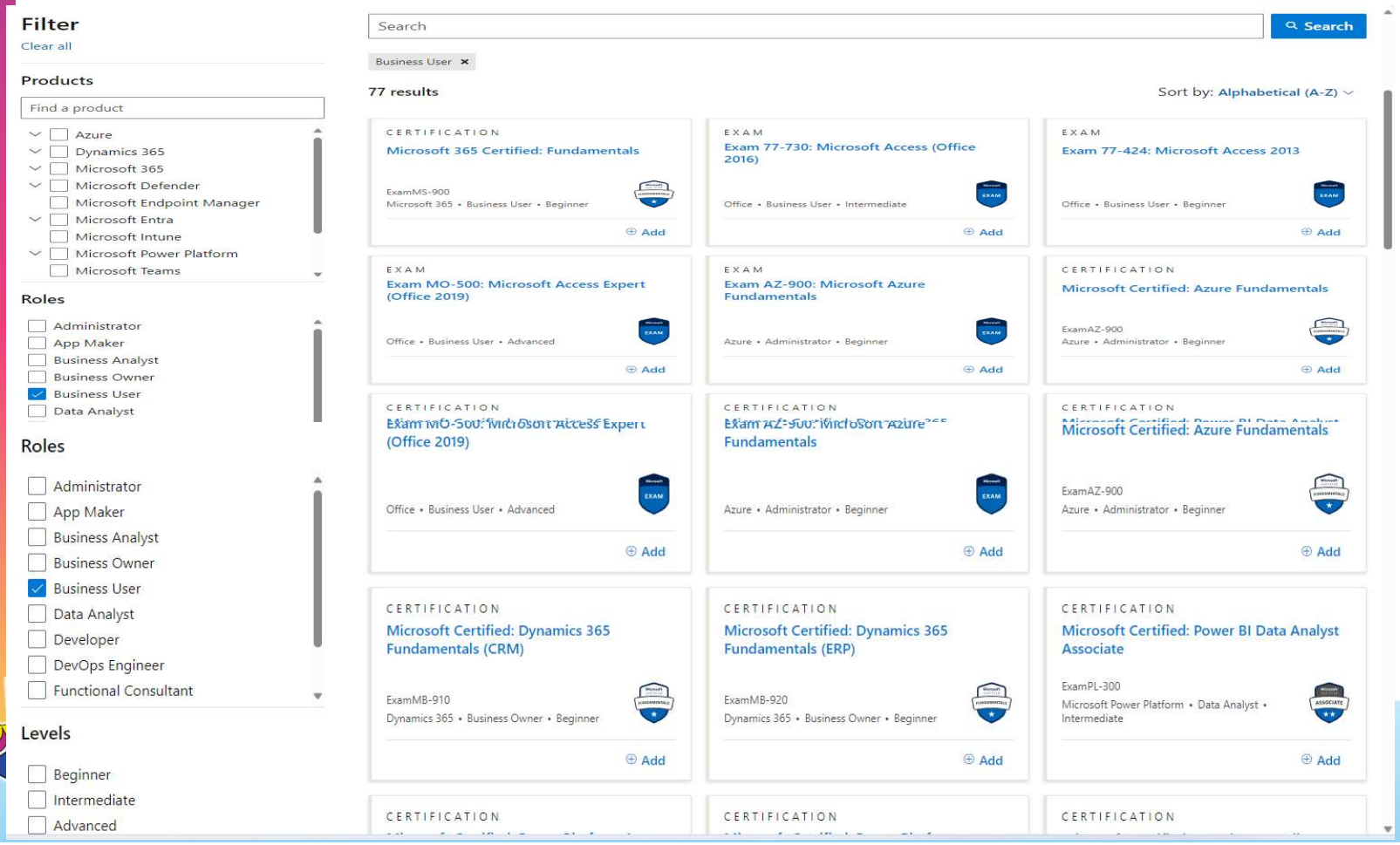
Love Microsoft Learn

https://learn.microsoft.com/en-us/training/





Certifications



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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