

A DYNAMICSCON PRESENTATION

The Secret Features of D365 CE



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**DYNAMICSCON
VIRTUAL**

MARCH 2023

**CUSTOMER
ENGAGEMENT**

DYNAMICSCON.COM

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AGENDA

Customize Viva Sales Forms

Custom status on SLA Timer

Release Planner

Customer Service Admin: Guided Channel Setups

Auto-complete Control

Ad-hoc Powerbi reports

Power Apps read only grid control

Modernized Case Grids

Duplicate Lead Detection

Form Component Control

In-app notifications for Model Driven Apps

Customize Viva Sales Forms

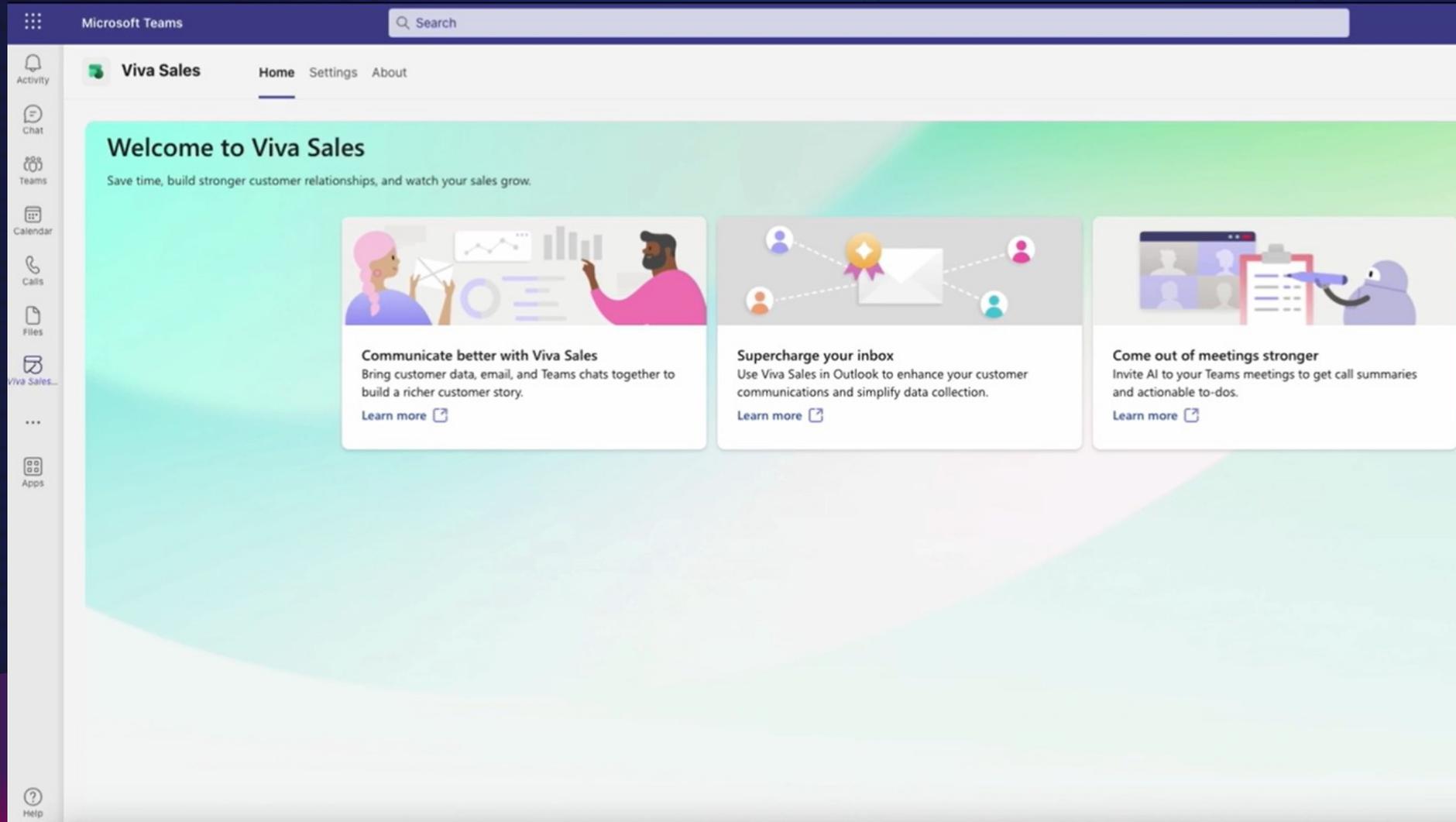
For Users, By Users

- **Change forms**
- **Add (custom) fields**
- **Allow for editing in Viva Sales Forms**

Customize Viva Sales Forms

For Users, By Users

- Access Configuration in Teams



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Customize Viva Sales Forms

For Users, By Users

- Configuration in Teams > settings

Microsoft Teams

Search

Viva Sales Home **Settings** About

Viva Sales settings

Set environment-wide controls for Viva Sales. [Learn more](#)

Admin settings

- Forms

Customize forms and fields

Choose which fields to show for each record type in Viva Sales, and define behavior for your team. [Learn more](#)

Refresh

Contact	Edit
Opportunity	Edit
Account	Edit

Signed in to Dynamics 365
orgf46e0a02.crm.dynamics.com
[Switch environments in Outlook](#)

Help

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Customize Viva Sales Forms

For Users, By Users

- Configuration in Teams > settings

Microsoft Teams

Viva Sales Home Settings About

Viva Sales settings

Set environment-wide controls for Viva Sales. [Learn more](#)

Admin settings

- Forms

Opportunity settings

Customize fields and set properties for opportunities in Viva Sales. [Learn more](#)

Allow editing

Choose whether sellers will be able to update opportunities in Dynamics 365 directly from Viva Sales. [Learn more](#)

Manage fields

Select the fields that will be shown in Viva Sales, and decide if sellers should be able to edit them. [Learn more](#)

[+ Add fields](#)

Display name	Required	Allow editing
Topic	Yes	<input type="checkbox"/>
Est. Revenue		<input type="checkbox"/>
Est. Close Date		<input type="checkbox"/>
Account		<input type="checkbox"/>
Created By		<input type="checkbox"/>
Created On		<input type="checkbox"/>
Owner		<input type="checkbox"/>

Signed in to Dynamics 365
orgf46e0a02.crm.dynamics.com
[Switch environments in Outlook](#)

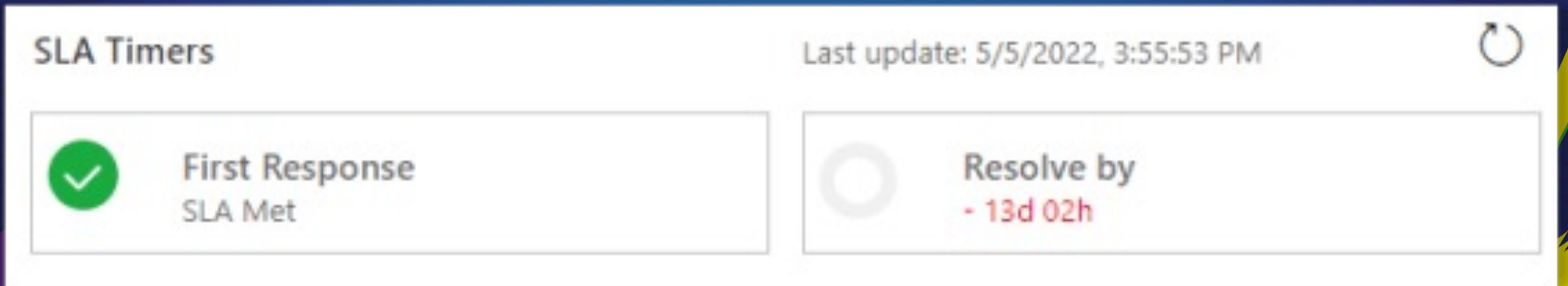
Help

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Configure custom status on SLA Timer

For Users, By Users

- **New SLA Timer control (May 2021)**
- **Ability to configure status text on timer control**
 - **OOB: Succeeded, Nearing non-compliance, Non-compliant**
- **Will not change the name/value of the status in the SLA KPI Instance**



The screenshot displays the 'SLA Timers' dashboard. At the top left, it says 'SLA Timers' and at the top right, 'Last update: 5/5/2022, 3:55:53 PM' with a refresh icon. Below this, there are two SLA timer cards. The first card, 'First Response', shows a green checkmark icon and the text 'SLA Met'. The second card, 'Resolve by', shows a grey circle icon and the text '- 13d 02h'.

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VIRTUAL

Configure custom status on SLA Timer



- Formula is **Language code=Value:Custom Status**
- **Language code** represents the language
- **Value** represents the actual value (number) set in the SLA KPI Instance
- **Custom Status** represents the custom control for this status.
- Example: **1033=4:SLA Met**
 - 1033 = The English Language
 - 4=Succeeded (value of SLA)
 - **SLA Met** is custom status

Edit column

Previously called fields. [Learn more](#)

Display name *

Choices Sort ▾

	Label *	Value *		
⋮	In Progress	0	⋮	🗑️
⋮	Noncompliant	1	⋮	🗑️
⋮	Nearing Noncompliance	2	⋮	🗑️
⋮			⋮	🗑️
⋮			⋮	🗑️
⋮			⋮	🗑️

SLA Timers

Last update: 5/5/2022, 3:55:53 PM

✅	First Response SLA Met
⌚	Resolve by - 13d 02h

NEW CHOICE

DEMO: Custom status on SLA Timer

For Users, By Users

Power Apps

Search

Environment
Dian's CE Environment

Home

Learn

Apps

Create

Dataverse

Flows

Chatbots

AI Builder

Cards (preview)

Solutions

Build business apps, fast

Create apps that connect to your data and work across web and mobile. [Learn about Power Apps](#)

Start from

- Blank app**
Create an app from scratch and then add your data
[Watch video](#)
- Dataverse**
Start from a Dataverse table to create a three-screen app
[Watch video](#)
- SharePoint**
Start from a SharePoint list to create a three-screen app
[Watch video](#)
- Excel**
Start from an Excel file to create a three-screen app
[Watch video](#)
- SQL**
Start from a SQL data source to create a three-screen-app
[Watch video](#)
- Image (preview)**
Upload an image of an app or form and we'll convert it into an app

make.powerapps.com/environments/0c0f1885-fd80-4109-8160-40635a3d7cba/home



D365 & Power Platform Release Planner

For Users, By Users

- **New way to view release notes**
- **Portal experience**
- **Easier way to see what's coming, what's changed, etc.**
- **<https://experience.dynamics.com/releaseplans/>**
- **Download wave summary**
- **Share your 'personal' release plans**
- **Add notes**

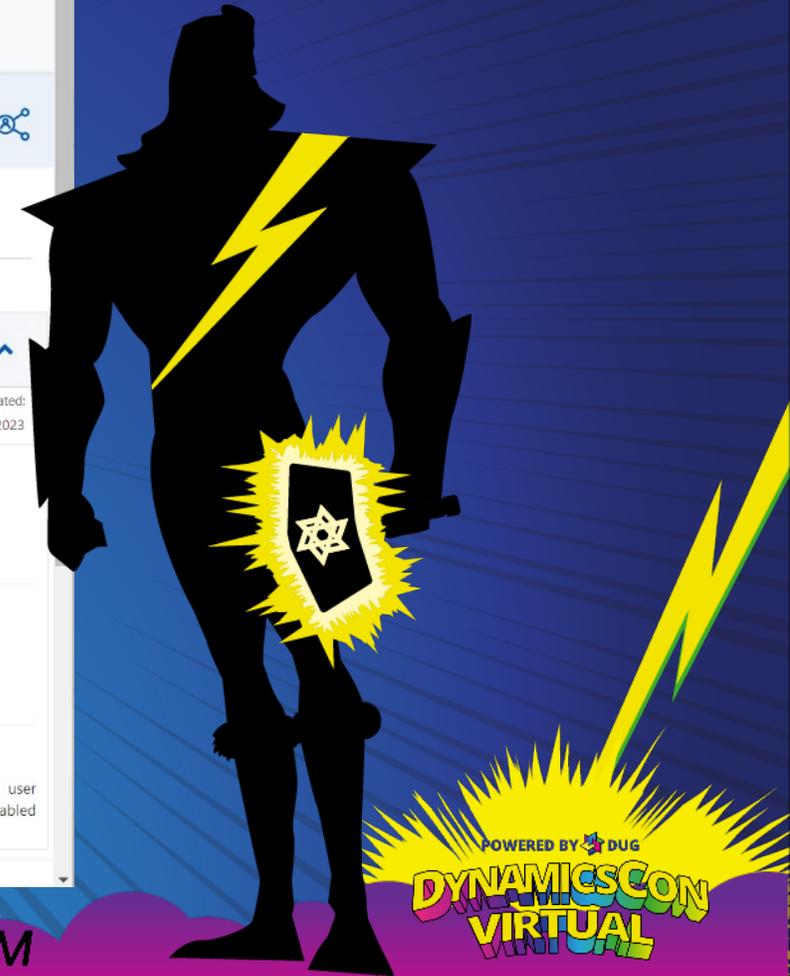


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D365 & Power Platform Release Planner

For Users, By Users

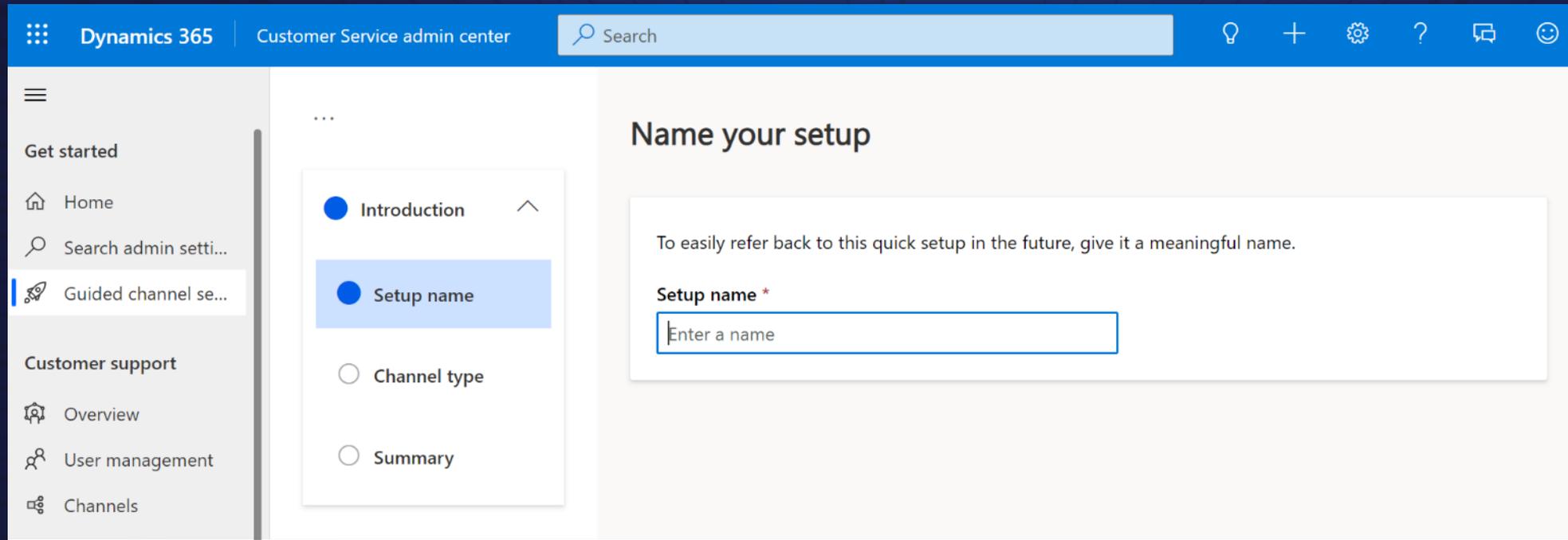
The screenshot shows the 'Dynamics 365 and Microsoft Power Platform Release planner' interface. The top navigation bar includes a search icon, 'What's new', and 'Feedback' buttons. Below the navigation, there are tabs for 'All release plans' and 'My release plans'. The left sidebar lists 'Dynamics 365' with sub-categories for 'Marketing' and 'Sales', and a section for 'Explore other plans' with links to 'Microsoft Cloud for Industry' and 'View plans in Microsoft Learn'. The main content area is divided into three sections: 'Planned' (1 upcoming features), 'Coming soon' (0 upcoming features), and 'Try now' (2 new features). The 'Planned' section is active, showing a feature for 'Dynamics 365 Sales' under the category 'Sales execution and sales force automation'. The feature description states: 'Get improved user experience with new and enhanced opportunity form'. It includes a 'NEW' badge, a 'GA Apr 1, 2023' date, and a 'Last updated: Jan 12, 2023' timestamp. The feature details include a description, a screenshot of the user interface, and a 'Learn more' button. The 'Available to:' section lists 'Users' and 'Timelines' with options for 'Early Access', 'Public Preview', and 'GA: Apr 2023'. The 'Included in:' section lists 'Dynamics 365 Sales 2023 release wave 1' and provides links for 'Read release overview' and 'Download wave summary'. The 'Enabled for:' section states 'Users, automatically' and provides a detailed description of the feature's impact on the user experience.



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Customer Service Admin: Guided Channel Setups

For Users, By Users

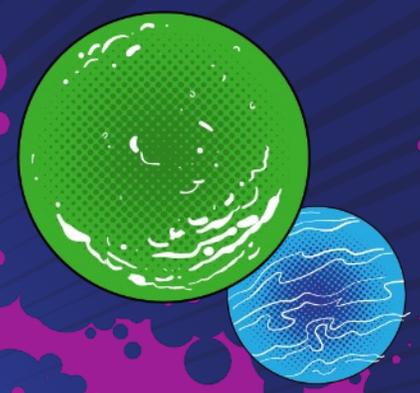


- **Feature to track setup of channels in the environment**
- **All the needed steps to configure a channel**
- **Admins can see what has been completed**



DEMO

Guided Setups



Auto-Complete Control

- Tie a table view or an option set to a text field
- Turns the text field into an option set!!



DEMO: Auto-Complete Control

For Users, By Users

Dynamics 365 Sales Hub

Search

Save As New Set As Default Refresh All

Sales Activity Social Dashboard

My Open Opportunities

Sales Pipeline

- 1-Qualify
- 2-Develop
- 3-Propose
- 4-Quote

Stage	Value
1-Qualify	\$186,028.26
2-Develop	\$120,701.28
3-Propose	

My Open Leads

Leads by Source

- (blank)
- Advertisement
- Trade Show
- Web
- Word of Mouth

Source	Count
(blank)	18
Web	4
Advertisement	3
Trade Show	3
Word of Mouth	1

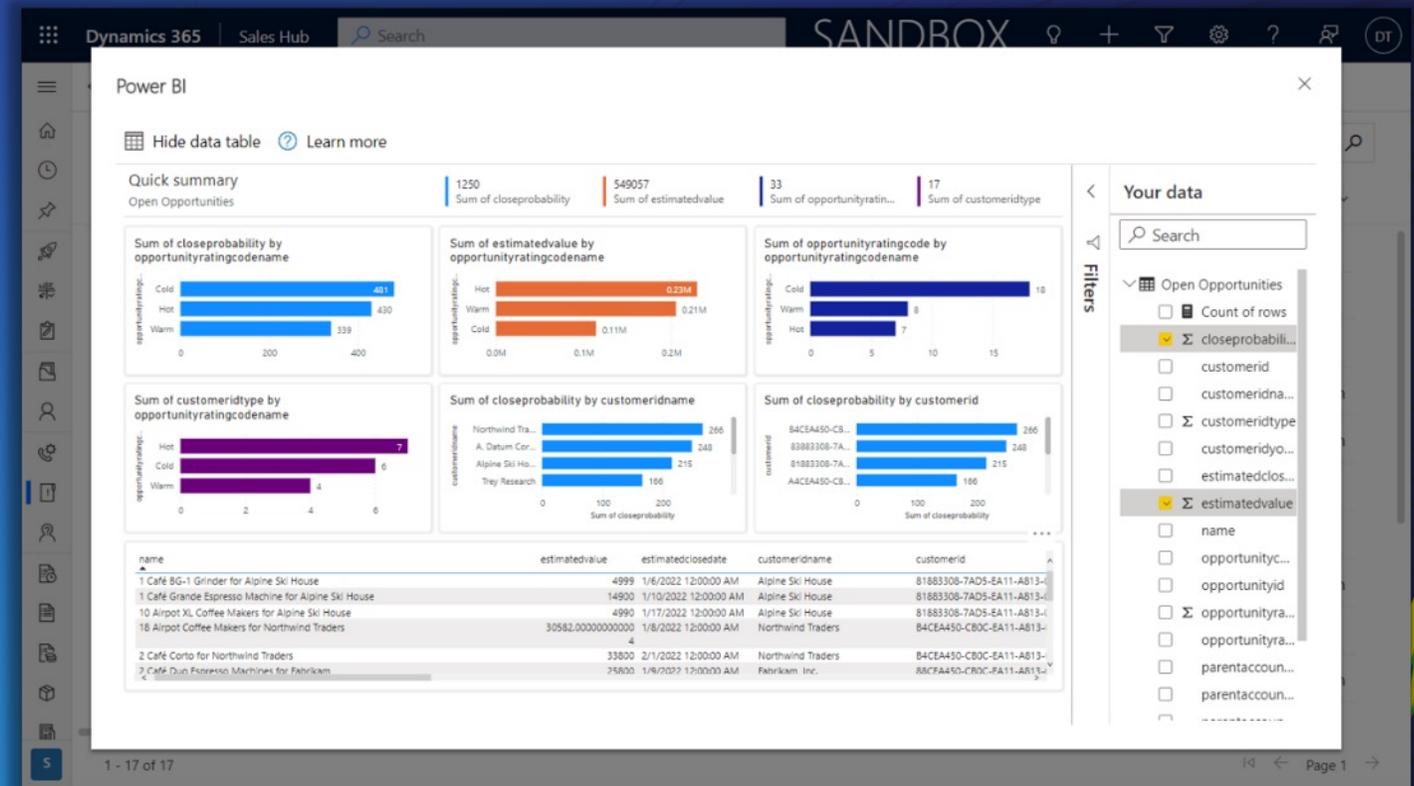
16

BY DUG
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TUAL

Ad-hoc PowerBI Reporting in D365

For Users, By Users

- **Generate PowerBI report with one button click**
- **Data used is based on view**
- **Report is editable**
- **Report can be saved!**
- **Turn on from App Settings**



DEMO: PowerBI Reporting in D365

Ref Users, By Users

Dynamics 365 | Sales Hub

Search

Save As | New | Set As Default | Refresh All

Sales Activity Social Dashboard

My Open Opportunities

Sales Pipeline

- 1-Qualify
- 2-Develop
- 3-Propose
- 4-Quote

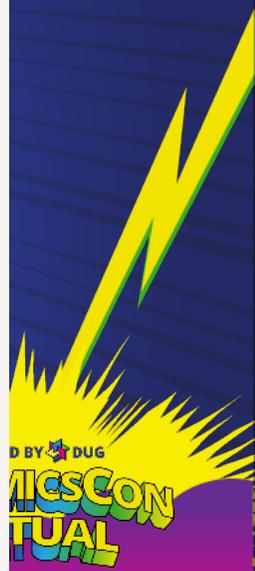
Stage	Value
1-Qualify	\$186,028.26
2-Develop	\$120,701.28
3-Propose	

My Open Leads

Leads by Source

- (blank)
- Advertisement
- Trade Show
- Web
- Word of Mc

Source	Count
(blank)	18
Web	4
Trade Show	3
Advertisement	3
Word of Mc	1



Modernized Case Grids

- **New visualization of case grid**
- **Enable by adding 'Power Apps Grid control' to case table**
- **New case view 'Enhanced Active Cases'**

Modernized Case Grids

- **New visualization of case grid**
- **Enable by adding 'Power Apps Grid control' to case table**
- **New case view 'Enhanced Active Cases'**

IMPORTANT!

- **NEXT SLA: Only shows the SLA KPI with the earliest expiration time**
- **If an SLA KPI is non compliant and another is counting down, the non compliant SLA will be shown**
- **Seems to break grid filtering when drilling down chart**

Modernized Case Grids

For Users, By Users

Dynamics 365 Customer Service workspace

AGENT DASHBOARD Omnichannel Ongo... Omnichannel Intra... Cases Enhanced Active C...

Show Chart Edit Delete Resolve Case Cancel Case Apply Routing Rule Assign Add to Queue Run Report Email a Link Do Not Decrement En...

Enhanced Active Cases* Edit columns Edit filters Filter by keyword

Case Title*	Customer*	Priority	Origin	Owner*	Status Reason	Next Sla	Last Interaction	Is Escalated	Case Age
Bayonet Coupling is dama...	Chipotle Farms	Normal	Facebook	Chris Driscoll	In Progress	34m 29s		No	05d 07h
Bill amount on invoice inc...	Chipotle Farms	Normal	Facebook	Accounting Team	Waiting for ...	Noncompliant SLA	Conversation Modified	No	42d 06h
Boxes damaged during shi...	Coho Diagnos...	High	Email	Shipments Queue	Waiting for ...	Noncompliant SLA		No	75d 00h
Contact information reque...	Dewey Squar...	Normal	Phone	Werner Brittany	Waiting for ...	Noncompliant SLA		No	90d 07h
Defective item delivered (s...	Coho Diagnos...	Low	Phone	Molly Clark	In Progress	17h 04m		No	97d 06h
Delivery didn't arrive	Fourth Coffee...	Normal	Email	Product Support	New	Noncompliant SLA		No	90d 06h
Device has no power	BorgWarner I...	Normal	Email	Sandra Hill	New	01h 34m		No	51d 07h
Device is leaking fluid	Active Transp...	Normal	Phone	Theresa Testing	Researching	Noncompliant SLA		No	50d 05h
Didn't get everything I ord...	Miller Househ...	High	Phone	Product Support	New	Not applicable		No	93d 05h
Hiiiiigh priority	Blue Yonder A...	High	Email	Dian Taylor	New	Not applicable	Inbound Email	No	52d 22h
HVAC is not cooling	Nationwide	Normal	Twitter	Theresa Testing	New	Noncompliant SLA		No	85d 00h
I need help logging in	Beahmke Hou...	Normal	IoT	Theresa Testing	New	Not applicable	Conversation Modified	No	73d 01h
Incorrect qty shipped	A. Datum Cor...	Low	Email	Copacker	In Progress	Not applicable		No	90d 08h

Using the Control on a Different Table!

For Users, By Users

Dynamics 365 | Sales Hub

Search

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

Accounts - Grid Visualization

Edit columns | Edit filters | Filter by keyword

Accou...	Account Name*	Accou...	Main ...	City	State/...	Account R...	Open ...	Open ...
ACT0000...	A. Datum Corporation	Custo...	548-555-...	New York	NY	Green	3	\$257,295..
ACT0000...	ABC Company	Prospect	954-555-...	Boca Raton	FL	Red	1	\$15,250.0
ACT0000...	Contoso Instrumentation	Custo...	425-555-...	Redmond	WA	Green	2	\$438,153..
VDR0000...	LA MESA RV CENTER, INC	Prospect	(901) 377...	Memphis	TN	Green	0	\$0.0
ACT0000...	Red Lobster Corporate	Custo...				Green	0	\$0.0
ACT0000...	ZYX Company	Prospect	713-673-...	Houston	TX	Green	0	\$0.0



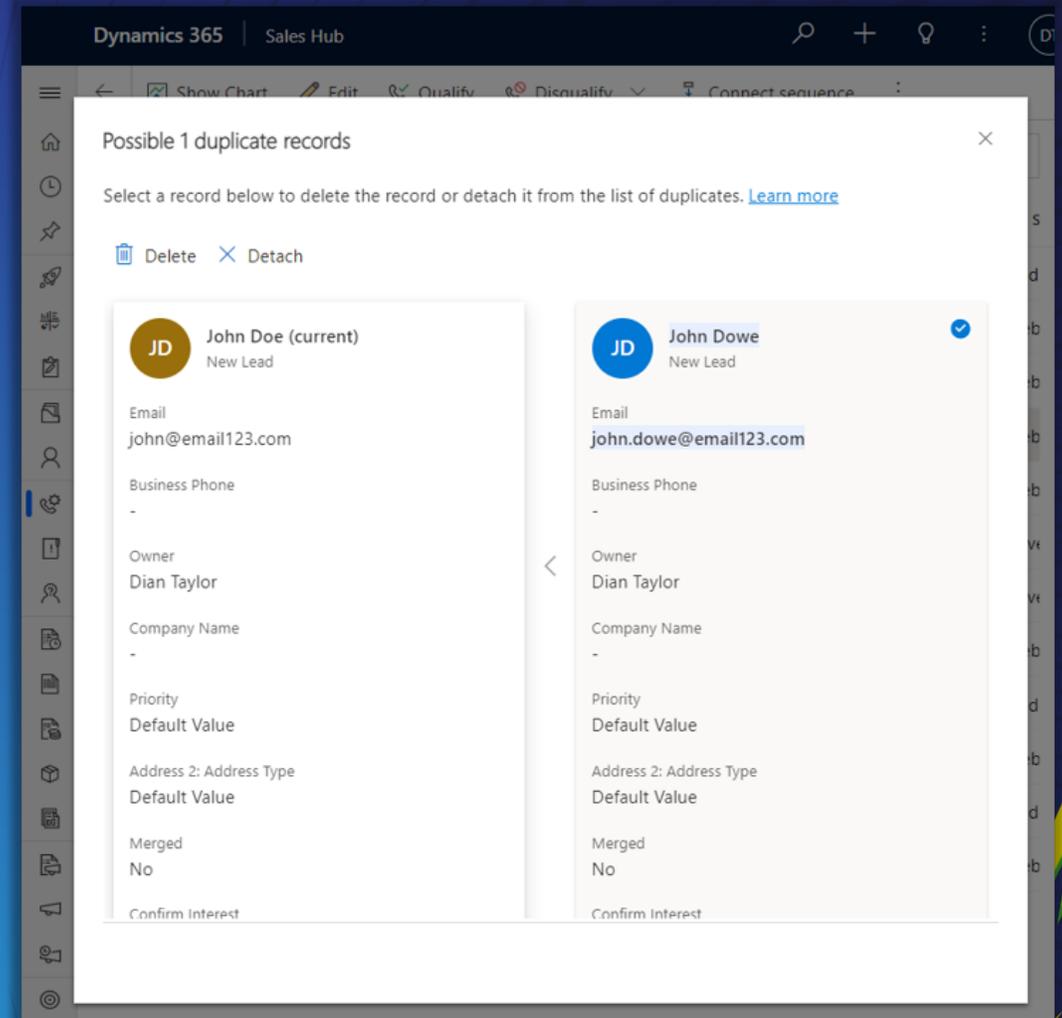
DEMO

Modernized Case Grid



Duplicate detection for Leads (preview)

- Different from the duplicate detection rules
- Will detect duplicate LEADS only
- Uses AI model with rules based on fuzzy logic and match codes
 - Can flag duplicates for similar names or email domain
 - Duplicate logic not configurable
- Needs to be turned on



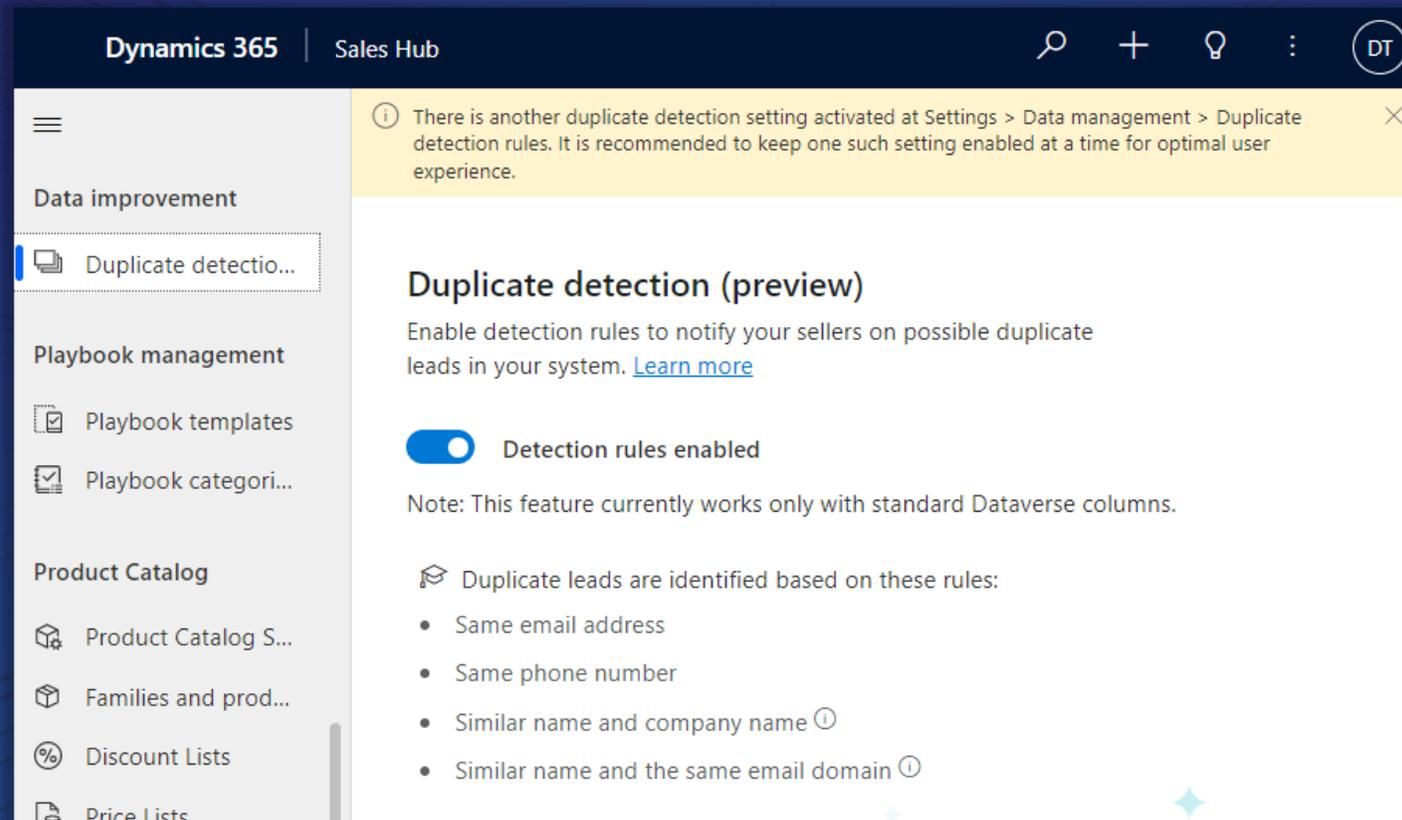
Duplicate detection for Leads (preview)

- **Logic rules:**
 - Same email address
 - Same phone number
 - Similar lead name and company name:
 - Merphy / Murphy
 - Similar lead name and email domain:
 - jmerphy@abc.com / jmurphy@abc.com

Duplicate detection for Leads (preview)

For Users, By Users

- Needs to be enabled



Dynamics 365 | Sales Hub

There is another duplicate detection setting activated at Settings > Data management > Duplicate detection rules. It is recommended to keep one such setting enabled at a time for optimal user experience.

Duplicate detection (preview)

Enable detection rules to notify your sellers on possible duplicate leads in your system. [Learn more](#)

Detection rules enabled

Note: This feature currently works only with standard Dataverse columns.

📖 Duplicate leads are identified based on these rules:

- Same email address
- Same phone number
- Similar name and company name ⓘ
- Similar name and the same email domain ⓘ

Duplicate detection for Leads (preview)

For Users, By Users

The screenshot displays the Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, 'Sales Hub', a search bar, and various utility icons. The left sidebar contains navigation options like Home, Recent, Pinned, My Work, Customers, and Sales. The main content area is titled 'Sales Activity Social Dashboard' and features two primary visualizations:

- My Open Opportunities:** A funnel chart representing the sales pipeline. The top section (blue) is labeled '1-Qualify' with a value of \$186,028.26. The middle section (orange) is labeled '2-Develop' with a value of \$120,701.28. The bottom section (purple) is labeled '3-Propose'. A legend indicates a fourth stage, '4-Quote' (yellow), which is not visible in the funnel.
- My Open Leads:** A pie chart showing the distribution of leads by source. The legend includes: (blank) (blue), Advertisement (orange), Trade Show (purple), Web (yellow), and Word of Mouth (dark blue). The chart shows 18 leads from (blank), 4 from Web, 3 from Advertisement, 3 from Trade Show, and 1 from Word of Mouth.



Form Component Control

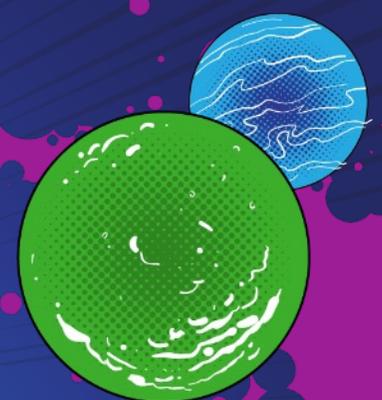
- Embed forms within forms
- Not a quick view form
- Data in the form is editable!
- Based on lookup – 1:N
- Must be a main form
- Add the embedded form to the model driven app

The screenshot displays the Microsoft Dynamics 365 Sales Hub interface for the account 'A. Datum Corporation'. The interface includes a navigation pane on the left with sections like 'My Work', 'Auto capture (preview)', 'Customers', 'Sales', and 'Leads'. The main content area shows a 'Summary' view with various tabs such as 'Customer Agreements', 'Financials', 'Customer Service', 'Assets and Locations', 'Servicing', 'Projects', 'Details', and 'Files'. A 'CONTACT INFORMATION' form component is highlighted with a red border, showing fields for 'Job Title' (Senior Manager), 'Email' (angel.castellar19...), 'Business Phone' (545-555-0158), and 'Mobile Phone' (347-555-8191). The text 'Form Component Control' is overlaid in red at the bottom of the highlighted area. The interface also shows a list of activities and a 'Primary Contact' section.



DEMO

Form Component Control



In-App Notifications

- Different from push notifications
- Created by Power Automate Flow
- Use XRM Toolbox to create them easily *(Check out my article and video on this topic!)*

The screenshot displays the Dynamics 365 Sales Hub interface. The main dashboard area is titled "SALES REP DASHBOARD" and contains several widgets:

- Sales Pipeline:** A funnel chart showing revenue distribution across stages: 1-Quality (\$179,028.26), 2-Develop (\$191,951.28), and 3-Propose (\$179,152.50). The total revenue is \$115,000.00.
- My Forecast:** A bar chart showing "Sum (Est. Revenue) (\$)" for "Jan 2022" and "Feb 2022". The Y-axis ranges from 0.00 to 200,000.00. The legend includes "Committed", "Best case", and "Pipeline".
- My Goals:** A section for "Goal Progress (Money)" with "In-progress (Money)" and "Actual (Money)" metrics.
- Sold CS Products:** A section for "Top 5 Products (Dollars)" with a total of \$165,266.26.

On the right side, there is a "Notifications" panel with a "Dismiss all" button. It lists several notifications:

- SLA missed:** Case record Average order shipment time (sample) assigned to you just went out of SLA.
- Upcoming Service Reminder:** Coho Winery has a service appointment coming up on 4/1/2021. Call Jim Glynn to confirm appointment.
- SLA critical:** Case record Complete overhaul required (sample) assigned to you is critically past SLA and has been escalated to your manager.
- Complete overhaul required (sample):** Maria Campbell mentioned you in a post: "@Paul we need to prioritize this overdue case. @Robert will work with you to engage engineering team ASAP."
- Welcome:** Welcome to the world of app notifications!

The interface also includes a left-hand navigation menu with options like Home, Recent, Pinned, My Work, Sales accelerator, Dashboards, Activities, Deal manager, Auto capture, Customers, Accounts, Contacts, Sales, Leads, Opportunities, Competitors, and Sales History.

Email Validation (preview)

For Users, By Users

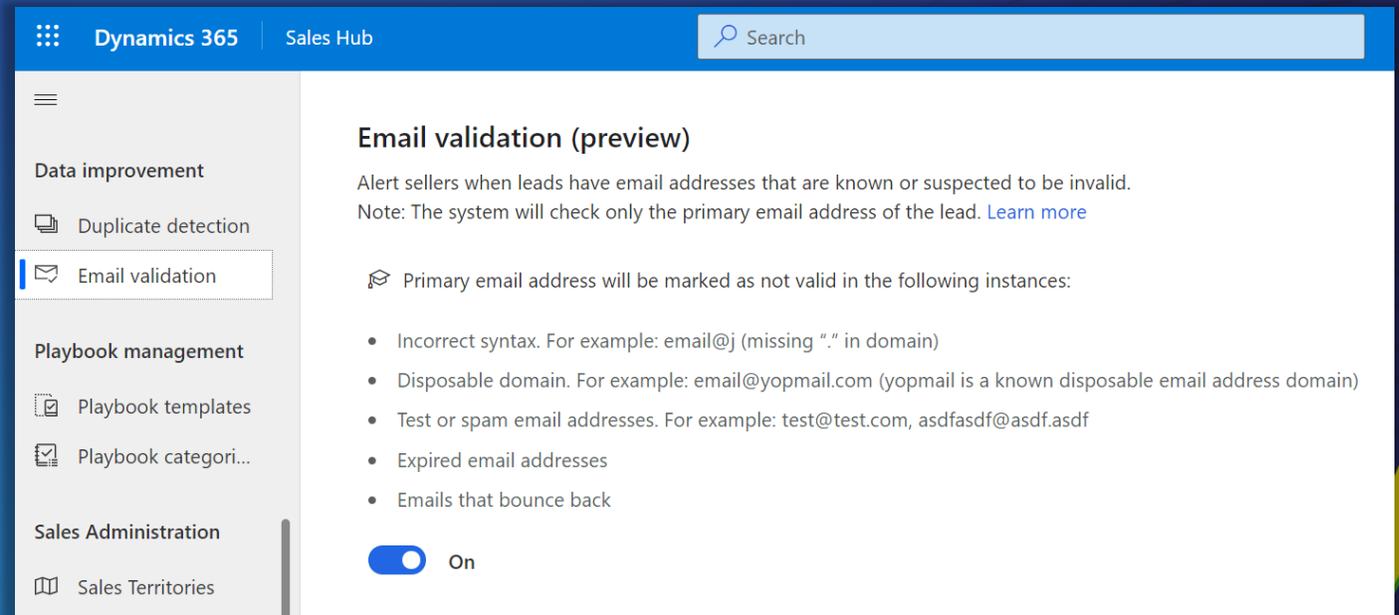
- System reviews email addresses
- Leads only
- Invalid email addresses show visual warning

The screenshot displays the Dynamics 365 Sales Hub interface in a 'SANDBOX' environment. On the left, a list of leads is shown, including Jane Doe, Jack Smith, Peter Houston (sample), Yvonne McKay (sample), Maria Campbell (sample), and Nancy Anderson (sample). Each lead entry includes an 'Automated introducer...' email and a timestamp. A red box highlights the email icon for Jane Doe, which is accompanied by a warning message: 'Email address for Jane Doe doesn't seem to be valid'. The right pane shows the detailed view for Jane Doe, including her profile, a 'Lead to Opportunity' progress bar, and a 'Summary' section. In the 'Up next' section, the 'Email' step is highlighted with a red box, and a 'Mark complete' button is visible next to it. The interface also shows a 'Call the customer' step.

Email Validation (preview)

For Users, By Users

- Needs to be turned on
- When turned on, validation starts
 - Active leads less than 180 old
 - Created or edited
- Not available in custom apps



The screenshot shows the Dynamics 365 Sales Hub interface. The top navigation bar includes the Dynamics 365 logo, the Sales Hub title, and a search bar. The left sidebar contains a menu with categories: Data improvement (Duplicate detection, Email validation), Playbook management (Playbook templates, Playbook categories), and Sales Administration (Sales Territories). The main content area is titled "Email validation (preview)" and contains the following text:

Alert sellers when leads have email addresses that are known or suspected to be invalid. Note: The system will check only the primary email address of the lead. [Learn more](#)

Primary email address will be marked as not valid in the following instances:

- Incorrect syntax. For example: email@j (missing "." in domain)
- Disposable domain. For example: email@yopmail.com (yopmail is a known disposable email address domain)
- Test or spam email addresses. For example: test@test.com, asdfasdf@asdf.asdf
- Expired email addresses
- Emails that bounce back

At the bottom of the settings area, there is a toggle switch labeled "On" which is currently turned on.

THANK YOU!!!!

