

# 2025 DYNAMICS CON



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# **10 Things I Wish I knew When I Became an Accidental Admin: A Survival Guide for New Administrators**

**Lokesh Patel**



# Introduction

- Senior Manager, Enstoa
- 7+ years working with D365 and Power Platform
- Atlanta, GA D365 User Group Chapter Leader
- DUG User Group – AEC Industry Leader



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Power BI | Power Apps | Power Automate



# Discussion Points

1. Admin center
2. Environments
3. Solutions
4. CoE
5. Approvals Toolkit
6. Error logging
7. Connections
8. Release Plans
9. XRM Toolbox
10. Community



# Admin Center

1

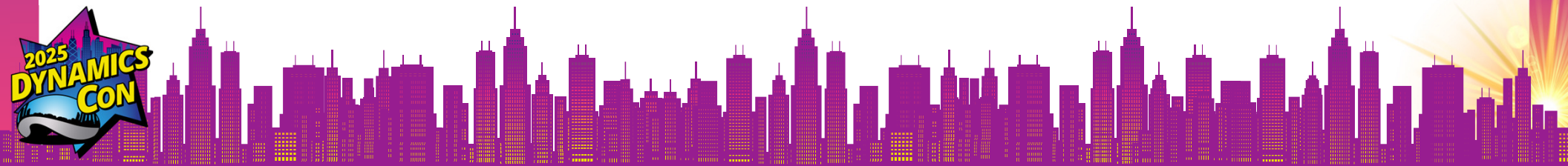
- Central hub for managing environments, capacity, and security
- Learn where to view analytics and set policies
- Understand user roles and access controls
- <https://admin.powerplatform.microsoft.com/>



# Environments

2

- Create Dev, Test, and Prod environments early
- Use environment roles and DLP policies
- Avoid building mission-critical apps in the Default environment



# Solutions

3

- Package apps, flows, and tables for better ALM
- Always build in a solution—even for quick work
- Easier deployment, rollback, and source control



# CoE (Center of Excellence)

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- Install Microsoft's free CoE Starter Kit
- Gain insights into usage, makers, and governance
- [Microsoft Power Platform Center of Excellence Kit - Power Platform | Microsoft Learn](#)





# Approvals Toolkit

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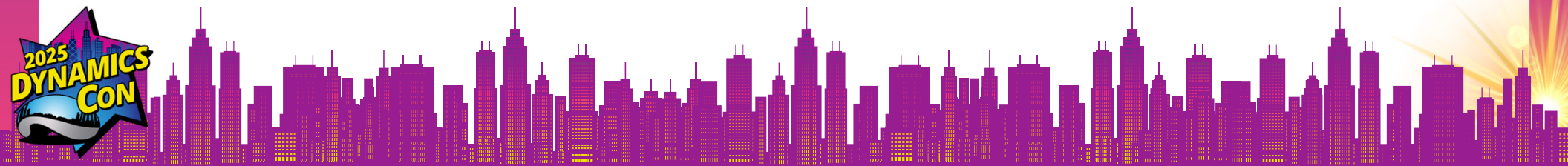
- Build or adopt a central approvals flow
- Avoid duplicate solutions across teams
- Enables reporting, escalation, and audit trails
- [Introducing Approvals kit - Microsoft Power Platform Blog](#)



# Error Logging

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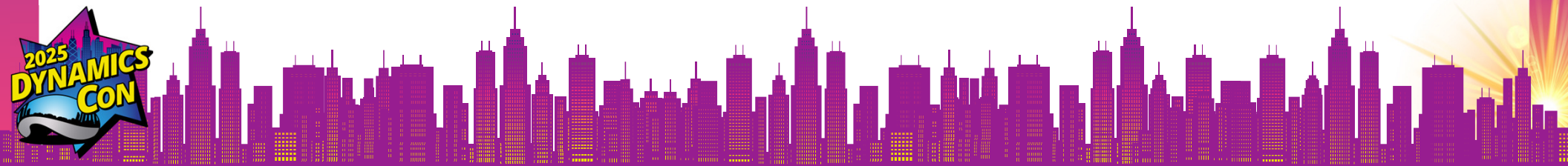
- Implement logging using Dataverse, Azure Tables, or Log Analytics
- Capture errors, timestamps, and input values
- Makes support easier and faster
- [Error Flow Template](#)



# Connections

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- Know where your connections are—and who owns them
- Use service accounts when needed
  - [Support for service principal owned flows - Power Automate | Microsoft Learn](#)
- Be cautious of embedded connections in shared flows



# Release Plans

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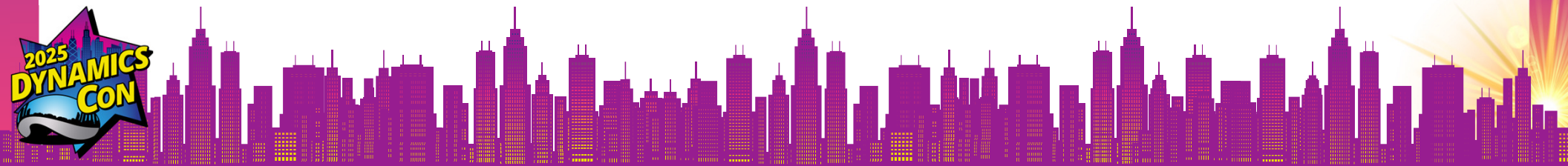
- Microsoft's wave releases bring big changes
  - Wave 1: April to September
    - Preview begins: January
    - General availability begins: April
  - Wave 2: October to March
    - Preview begins: July
    - General availability begins: October
- Stay ahead of deprecations and new features
- Use Release Planner + Release Notes
- <https://releaseplans.microsoft.com/en-US/>



# XRM Toolbox

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- Swiss army knife for Dataverse/CRM power users
- Use for bulk updates, metadata management, plugin tracing
- Community-built = powerful + free
- My favorite tool is FetchXML Builder
- [Home · XrmToolBox](#)



# Community!!!

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- Blogs, YouTube, forums, user groups
- Ask questions, share what you learn
- Shoutout to DUG, TechFluent, local D365 groups, etc.
- [Meetup - Dynamics User Group](#)
  - Atlanta User Group
  - DUG for AEC Hub (Architecture, Engineering, and Construction)





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Thank you



