2025 DYNAMICS CON

dynamicscon.com

Dynamics 356 Treasures Explore Overlooked D365 CE Features!!

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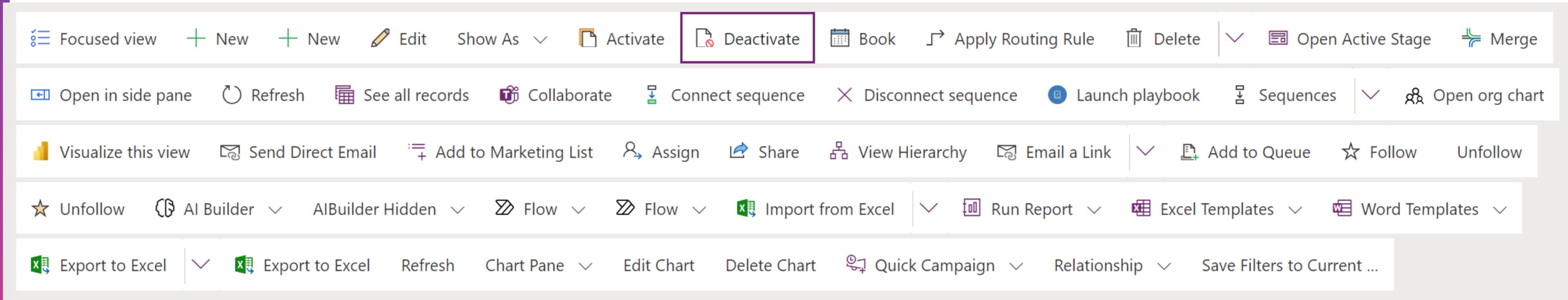
Configure legacy buttons on a view

- Ribbon Editor
- Hide Legacy Buttons
- Change actions
  - Run Jscript or PowerFX Formula



Notes Configurations

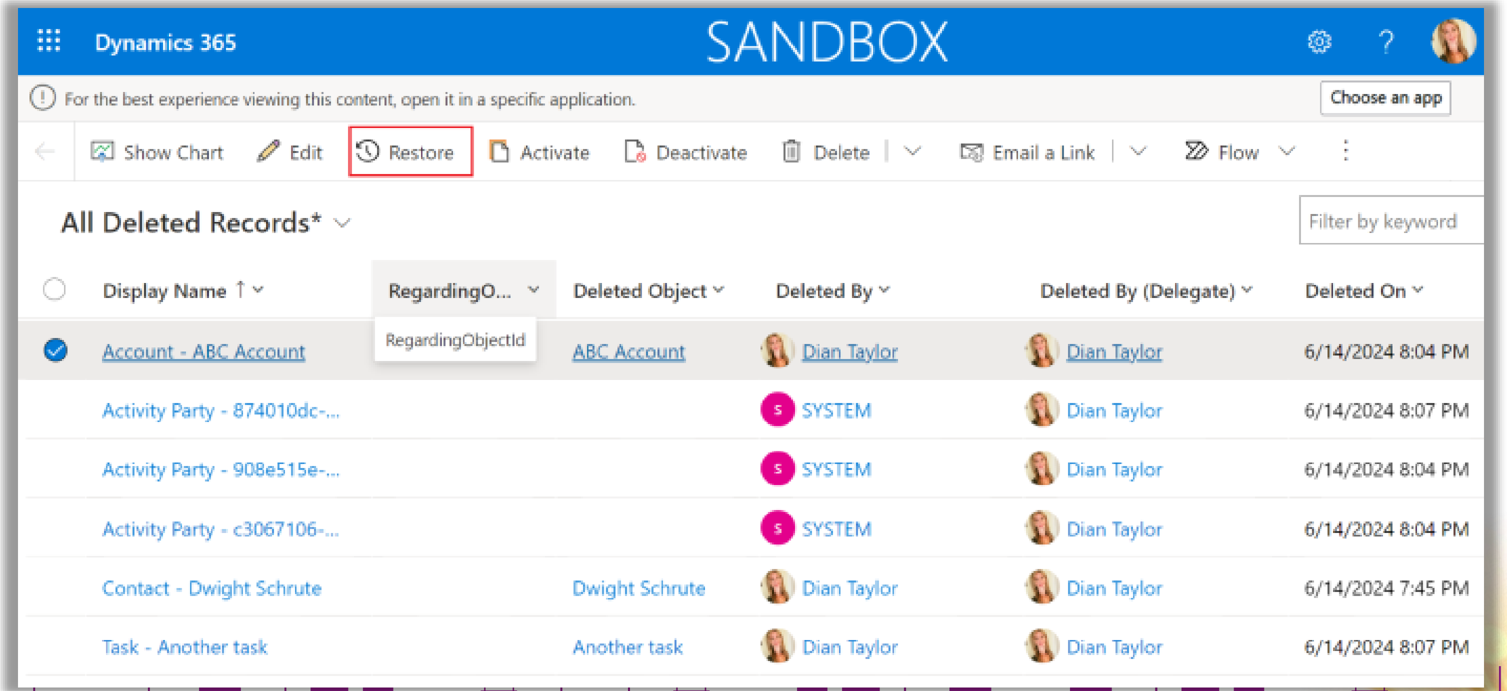
- Note Roll-up types
  - Related
  - Extended
    - Works for related contact/case/opportunity/quote
- Remove Title while authoring
- Allows to create note before parent record is created

Additional Timeline Config

- ‘What you’ve missed’ summary
- File Preview
- Timeline Highlights
  - Three most recent events from timeline
  - Can be enabled/disabled
  - Available in:
    - US
    - Europe
    - UK
    - Australia
    - India

Recycle Bin

- Ability to restore deleted rows
- Up to 30 days
- Enables for ALL TABLES
- View/Restore Deleted Rows
    - Administrator Roles only
    - No deleted related rows in view(cascading rules)



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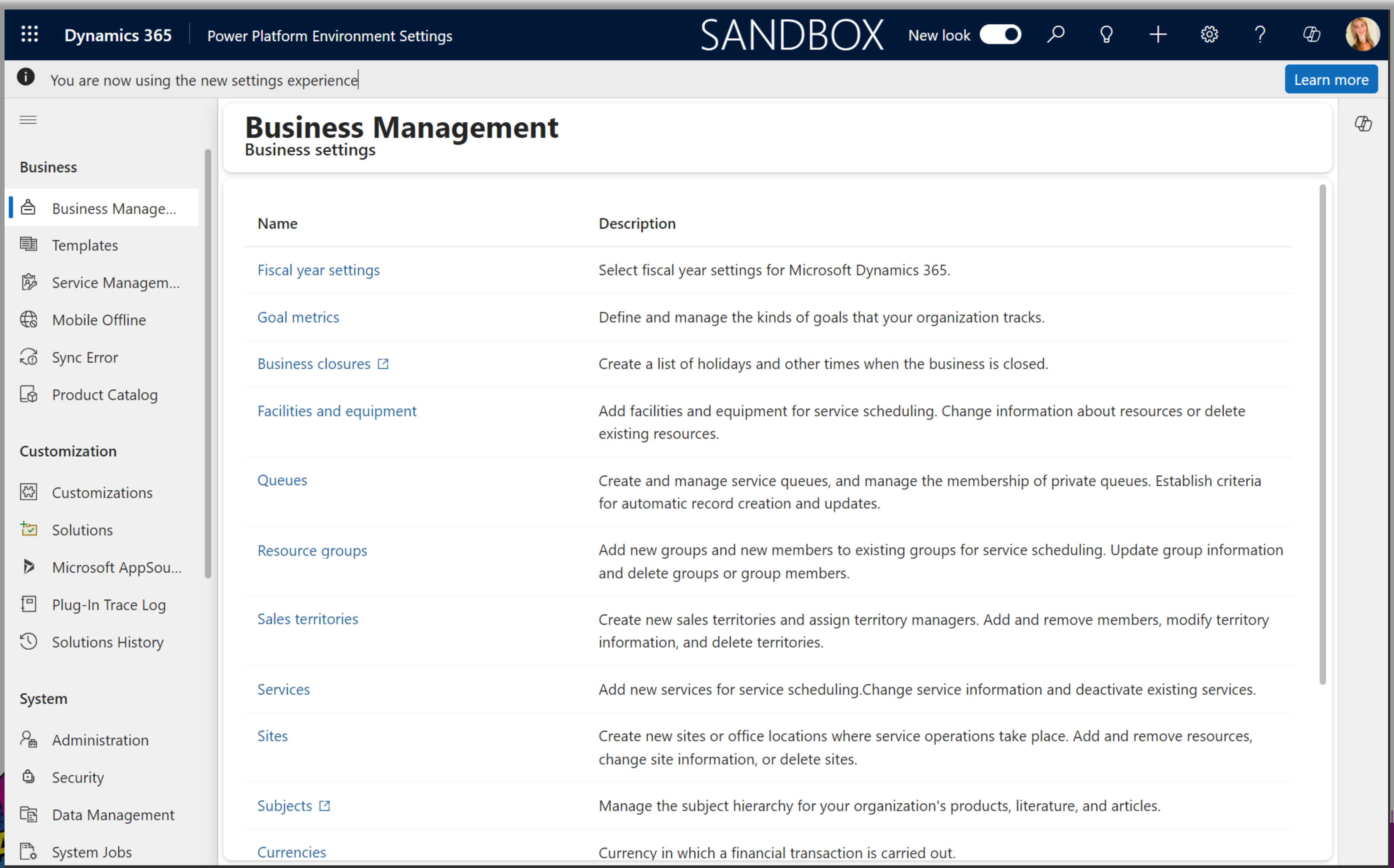
Power Platform Settings App



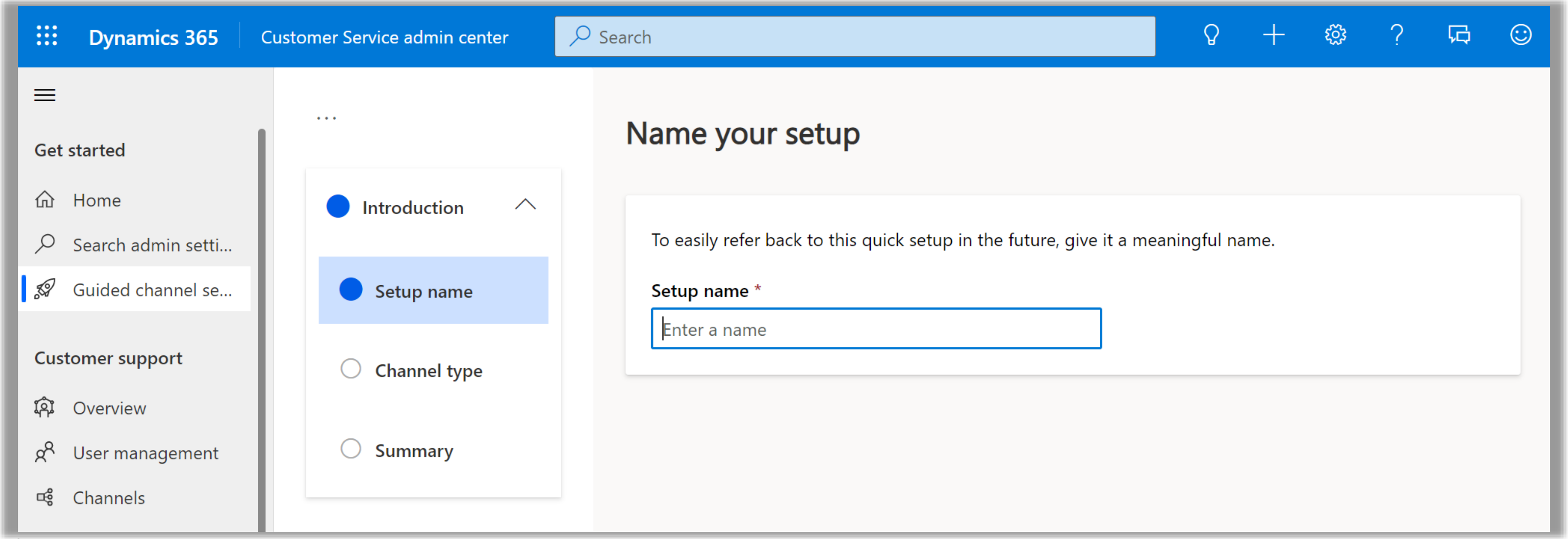
Demo 1

Customer Service: Search Admin settings

- Ability to use **search** to find tasks and settings

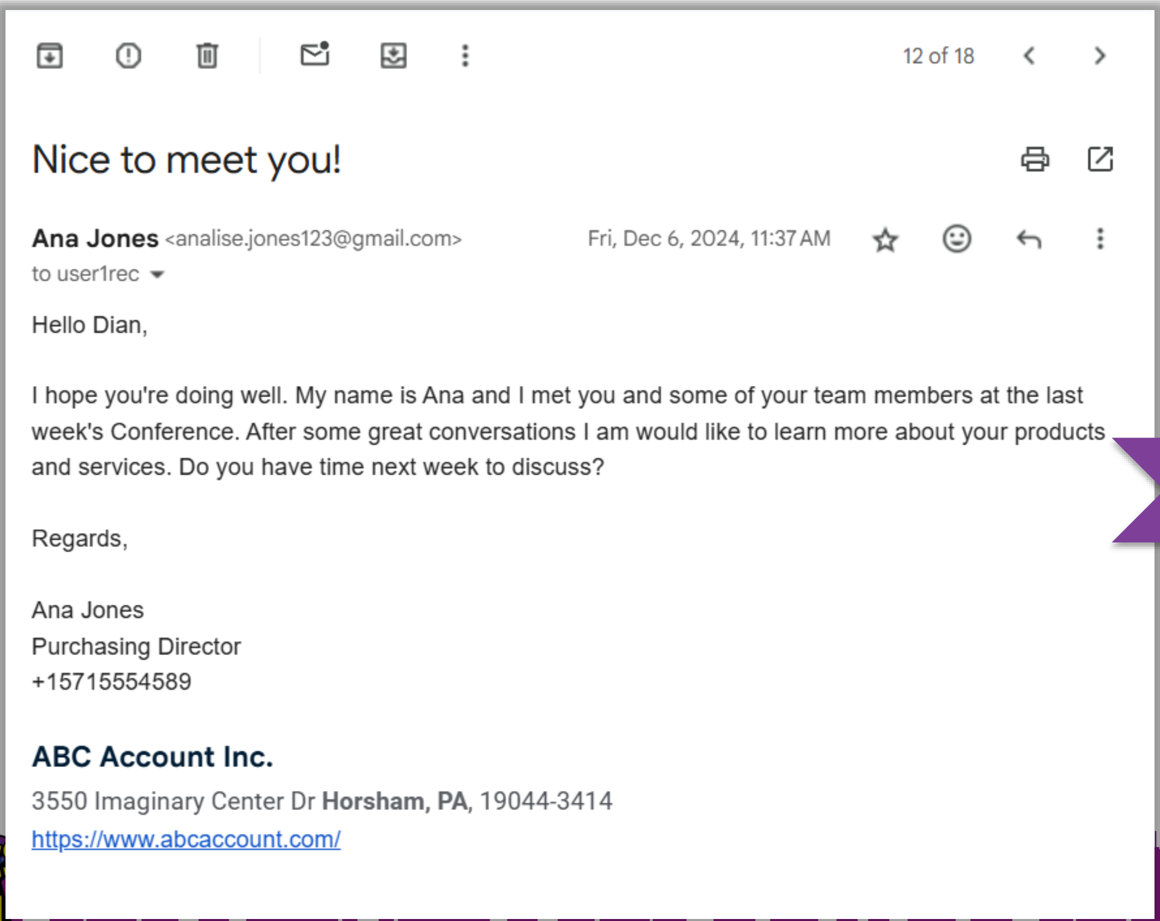
Guided Channel Setups

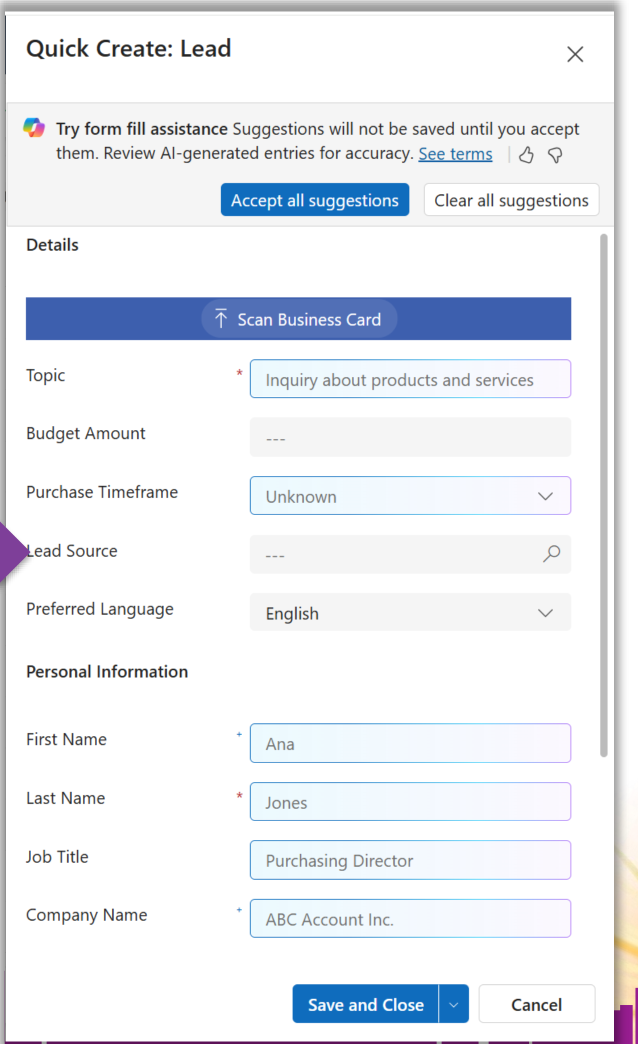
- Track channels setup
- All the needed steps to configure a channel
- Admins can see what has been completed



Smart Paste

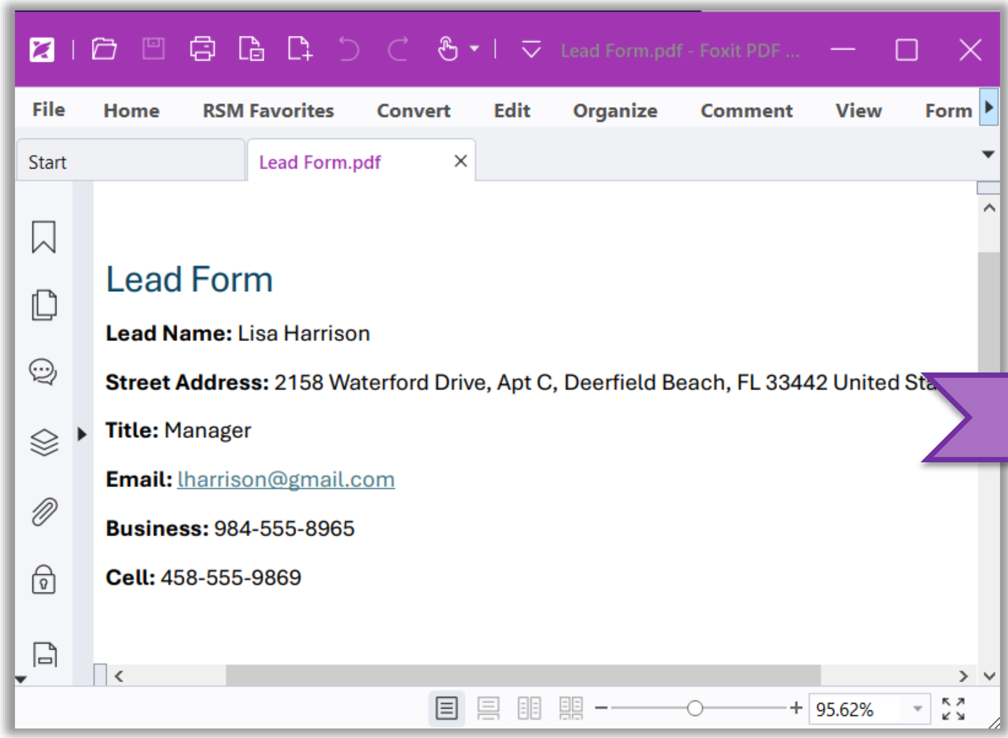
- Copy items to clipboard
- Paste into Dynamics 365 form (CTRL+V)

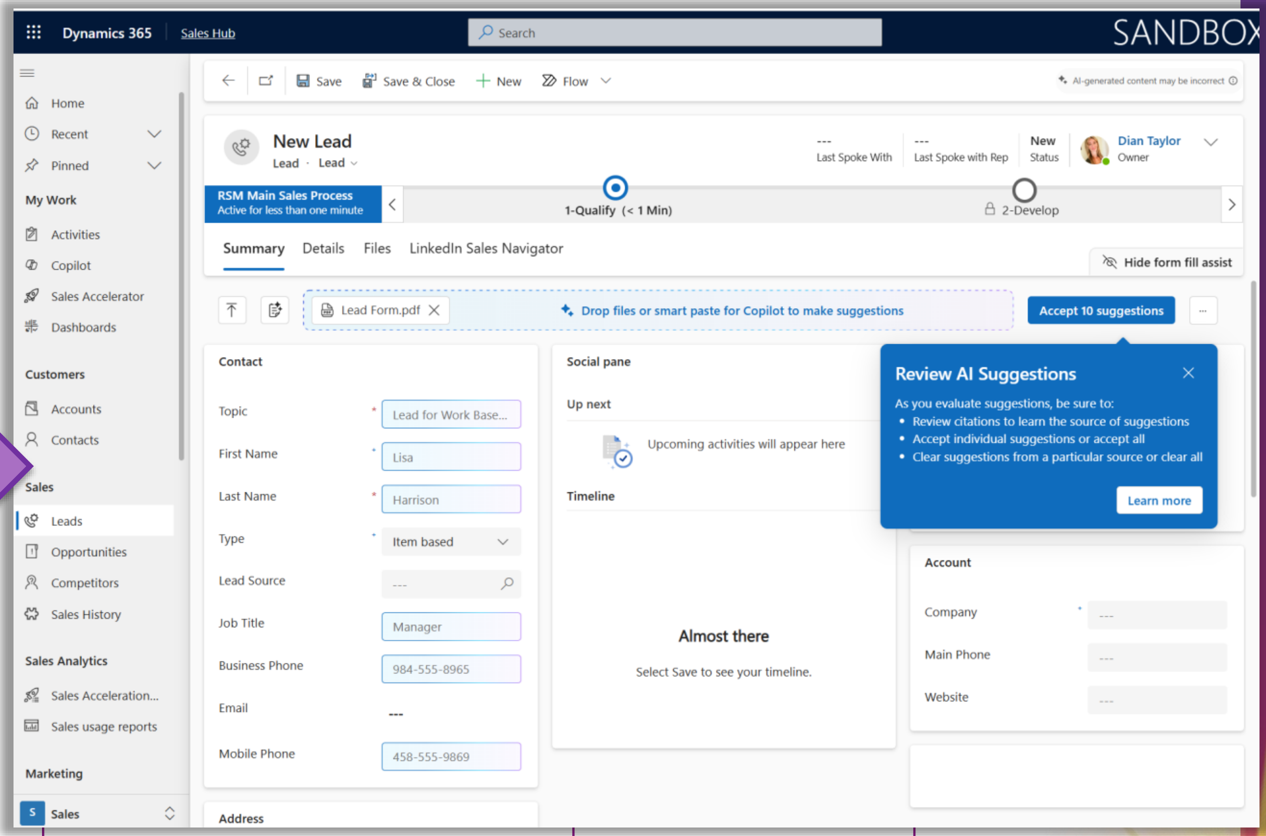




Form Fill Assist Toolbar

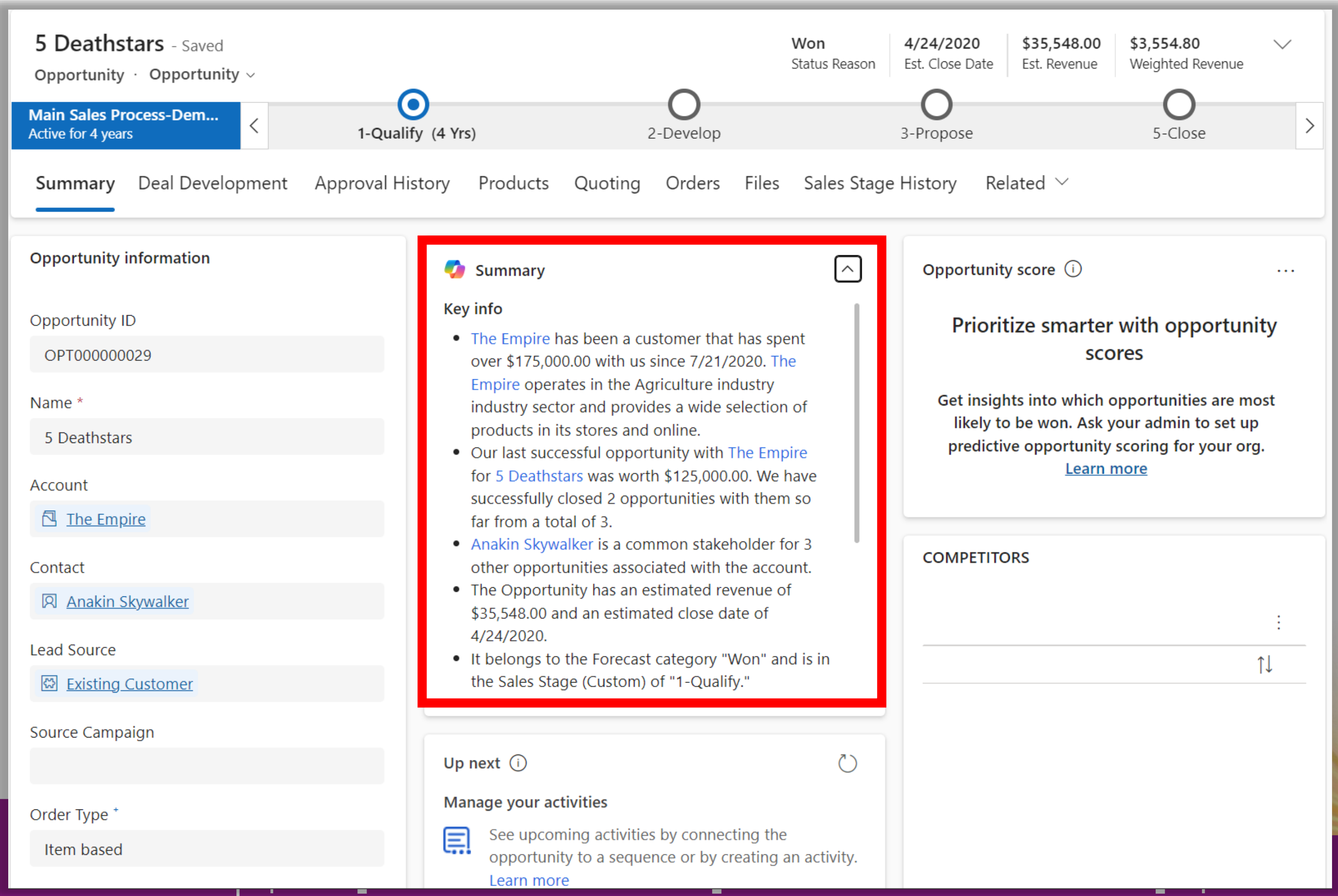
- Upload Document
- Fills out form with data from document





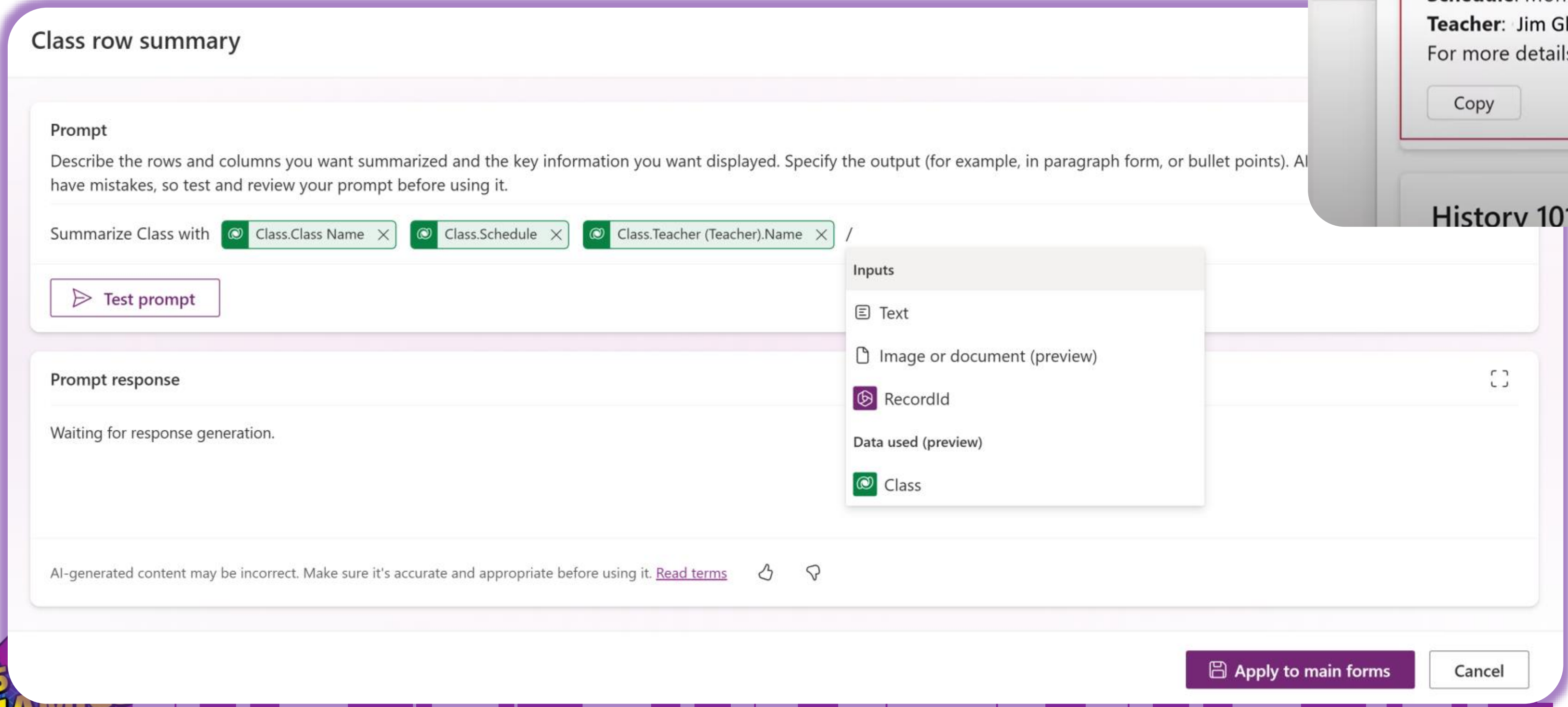
Add Copilot Summary to Oppty form

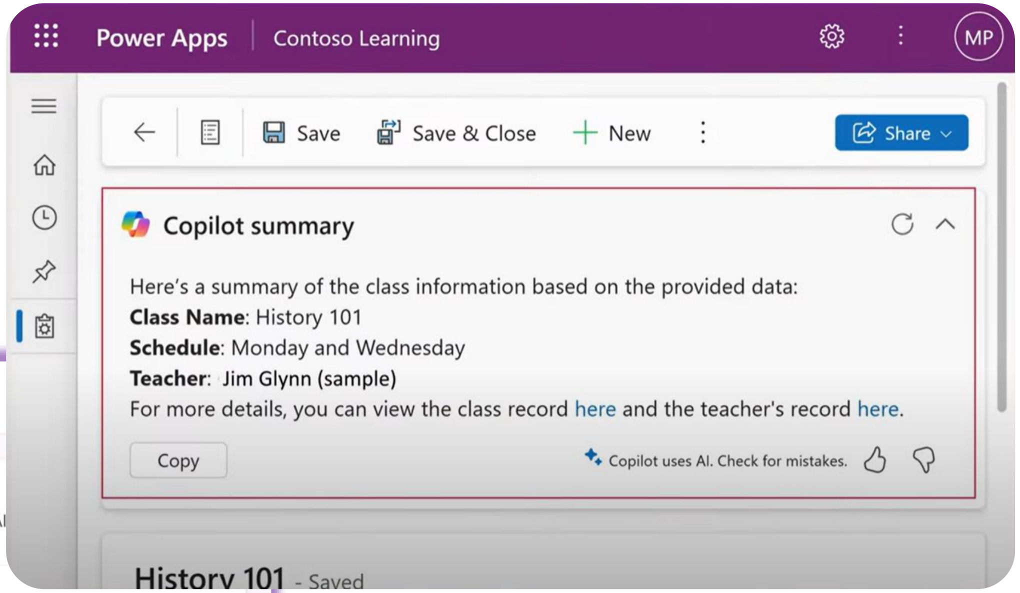
- Provides summary on opportunity form
- ‘Record Summary’ Control
- Can be added to custom opportunity forms!



Embedded Row Summaries (preview)

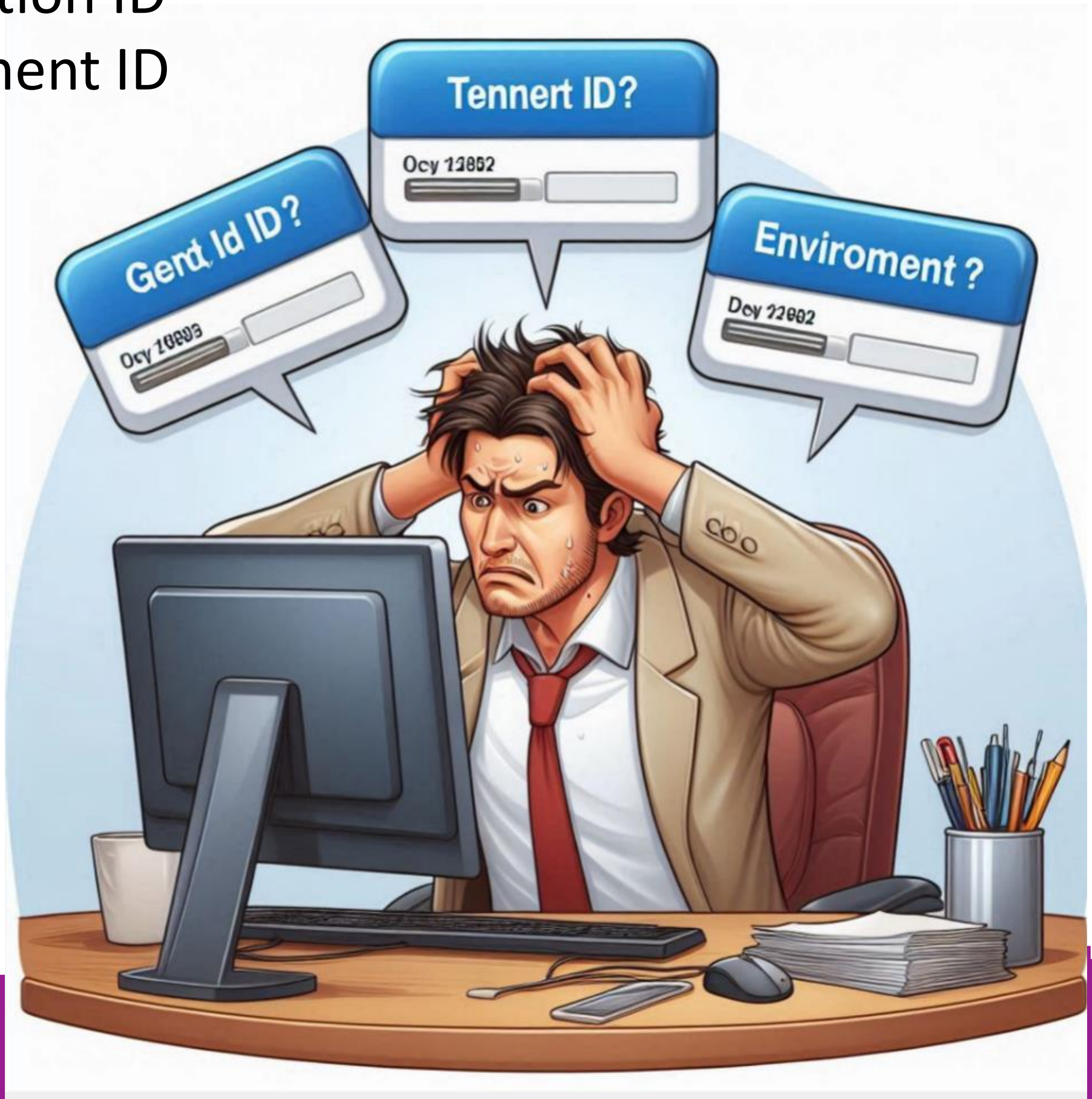
- Create for any table
- Configure using natural language prompts
- Choose which source fields to use (Including related tables)





How to get your org details quick?

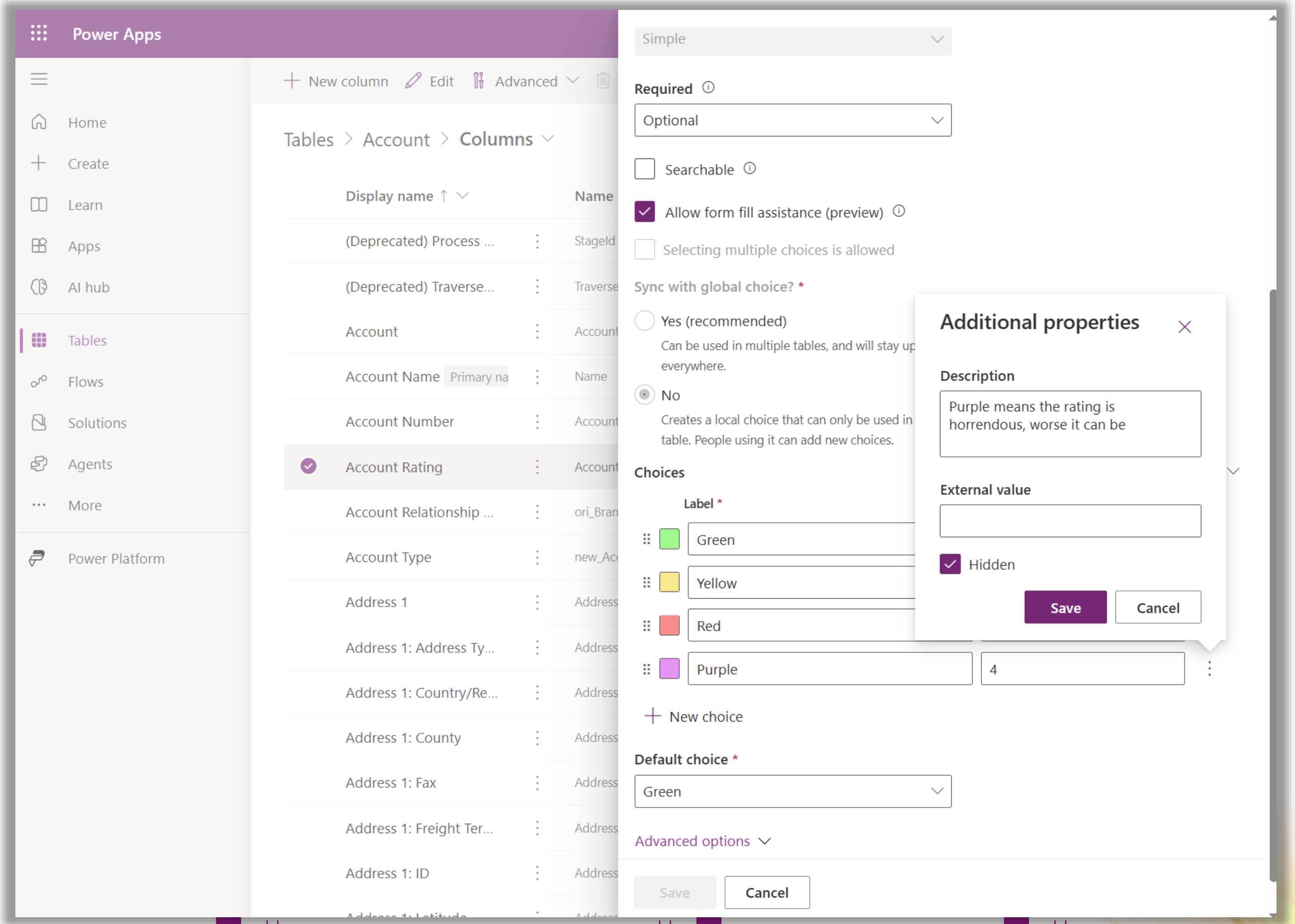
- Tenant ID
- Organization ID
- Environment ID



Demo 2

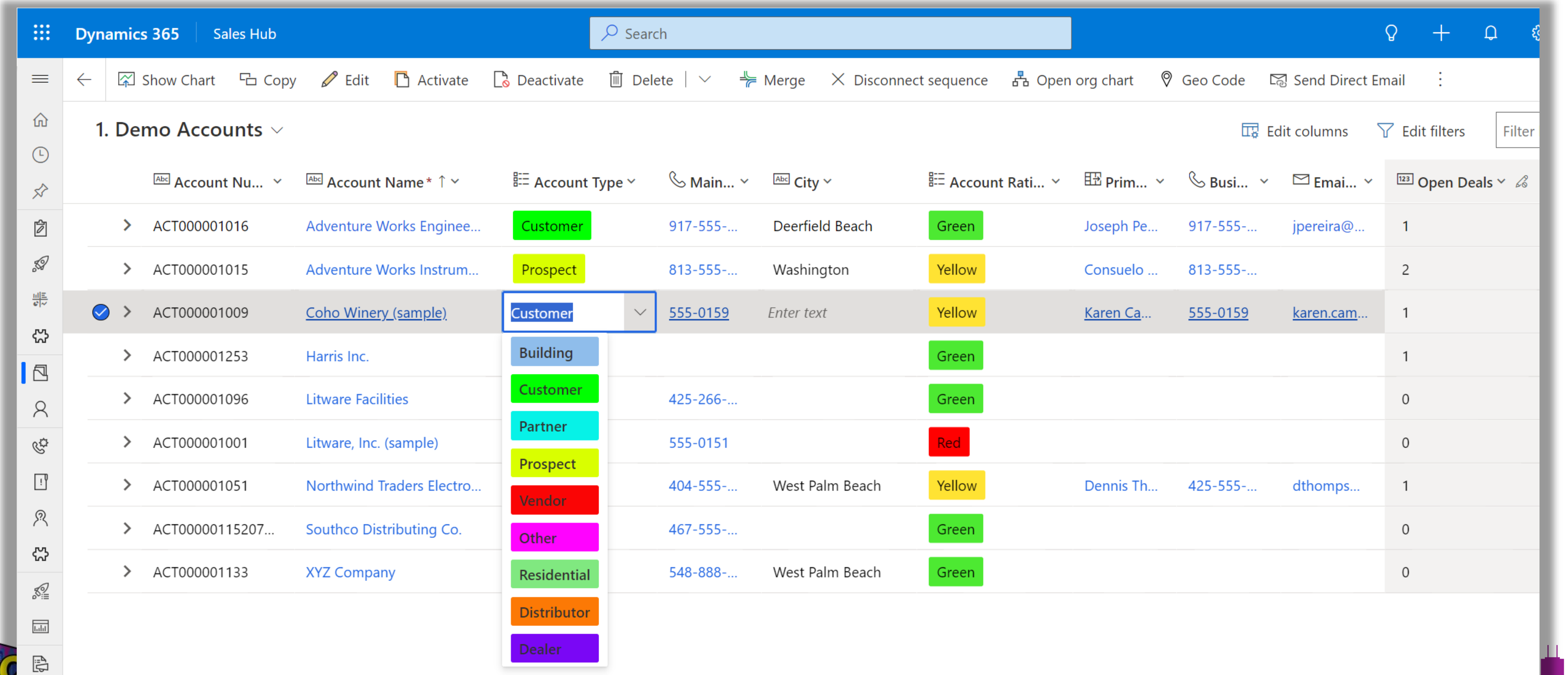
Additional Properties for Choice Fields values

- Add descriptions to Choice Field values
- Mark a Choice Field value as hidden



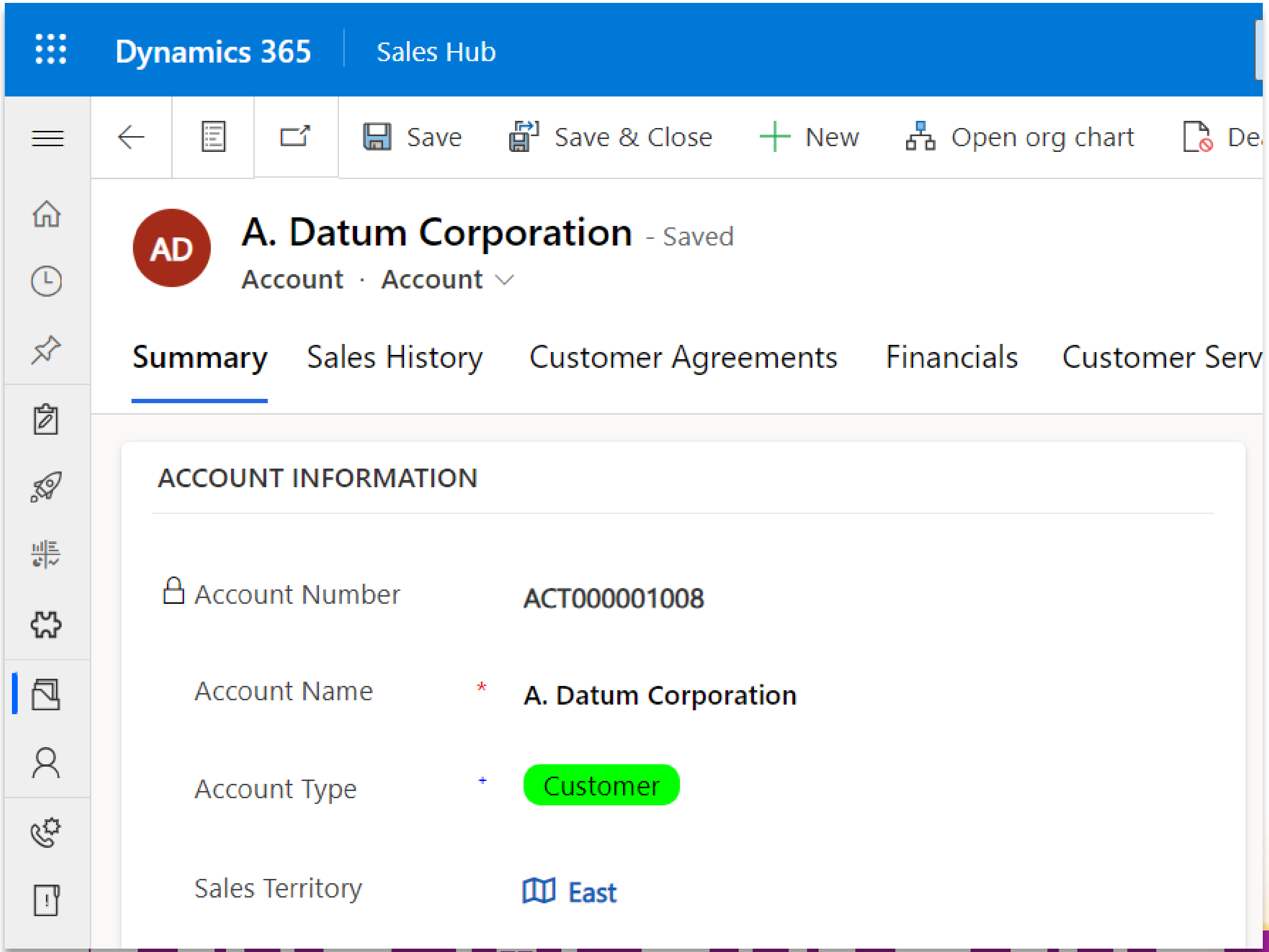
Choice field color configuration in views

- Configure colors in choice columns
- Set colors per choice



Choice field color configuration in forms

- Show colors in option set field on form
- Set colors per choice



Configuration

Field Configuration

- Configure colors in choice columns
- Set colors per choice

View configuration

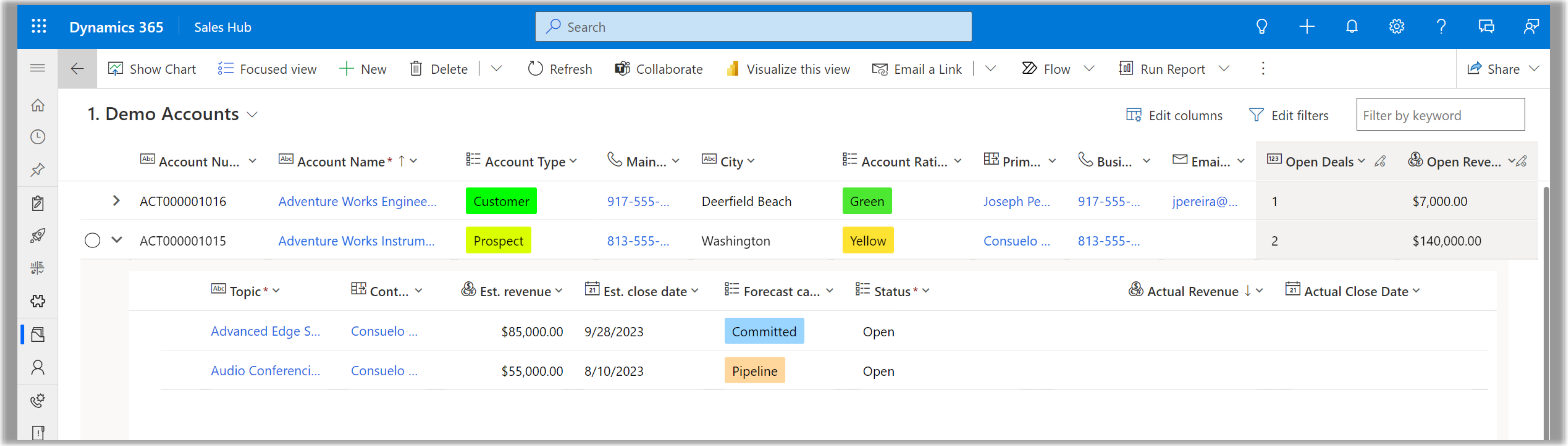
- Power Apps Grid Control in view
  - “Enable OptionSet Colors”

Form Configuration

- ‘OptionSet Wrapper’ control on column in fo

Nested Grids

- Show list of related records in view
- Child records



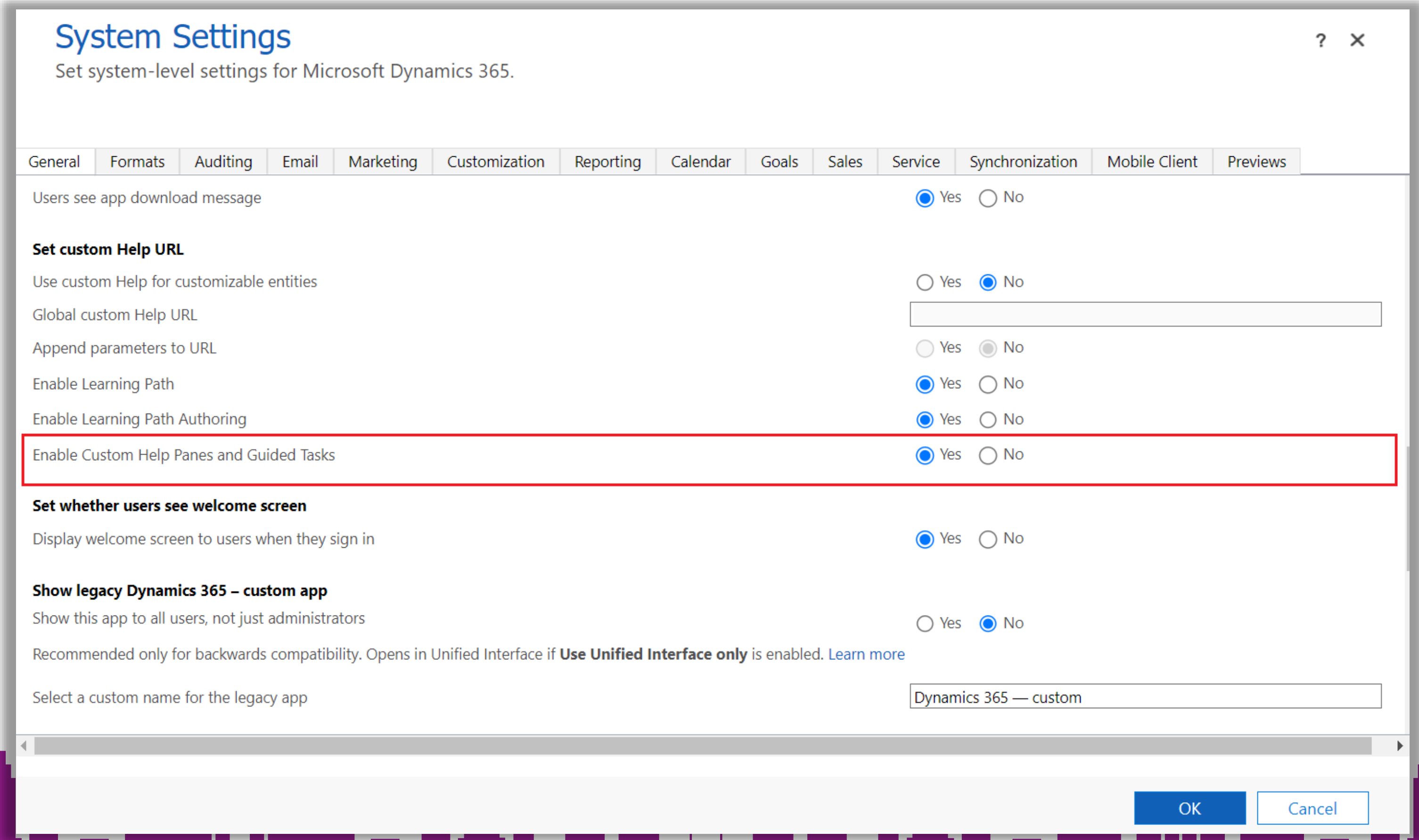
Demo 3

Custom help panes

- Help Panes in Dynamics 365
- Custom Content
  - Text
  - Images
  - Links
  - Videos
  - Visual pointers and coach marks

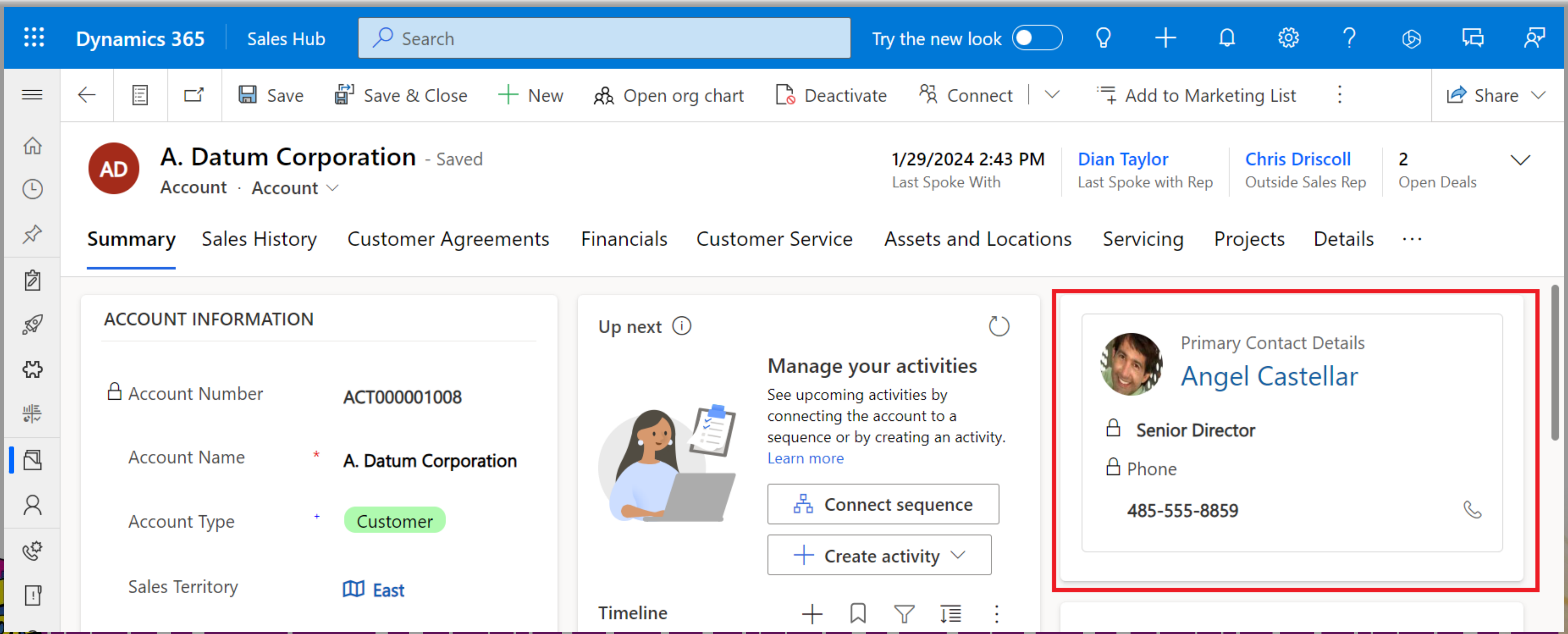
Custom help panes

- Enable ability to create help panes
- Administration > System Settings > Enable Custom Help Panes and Guided Tasks



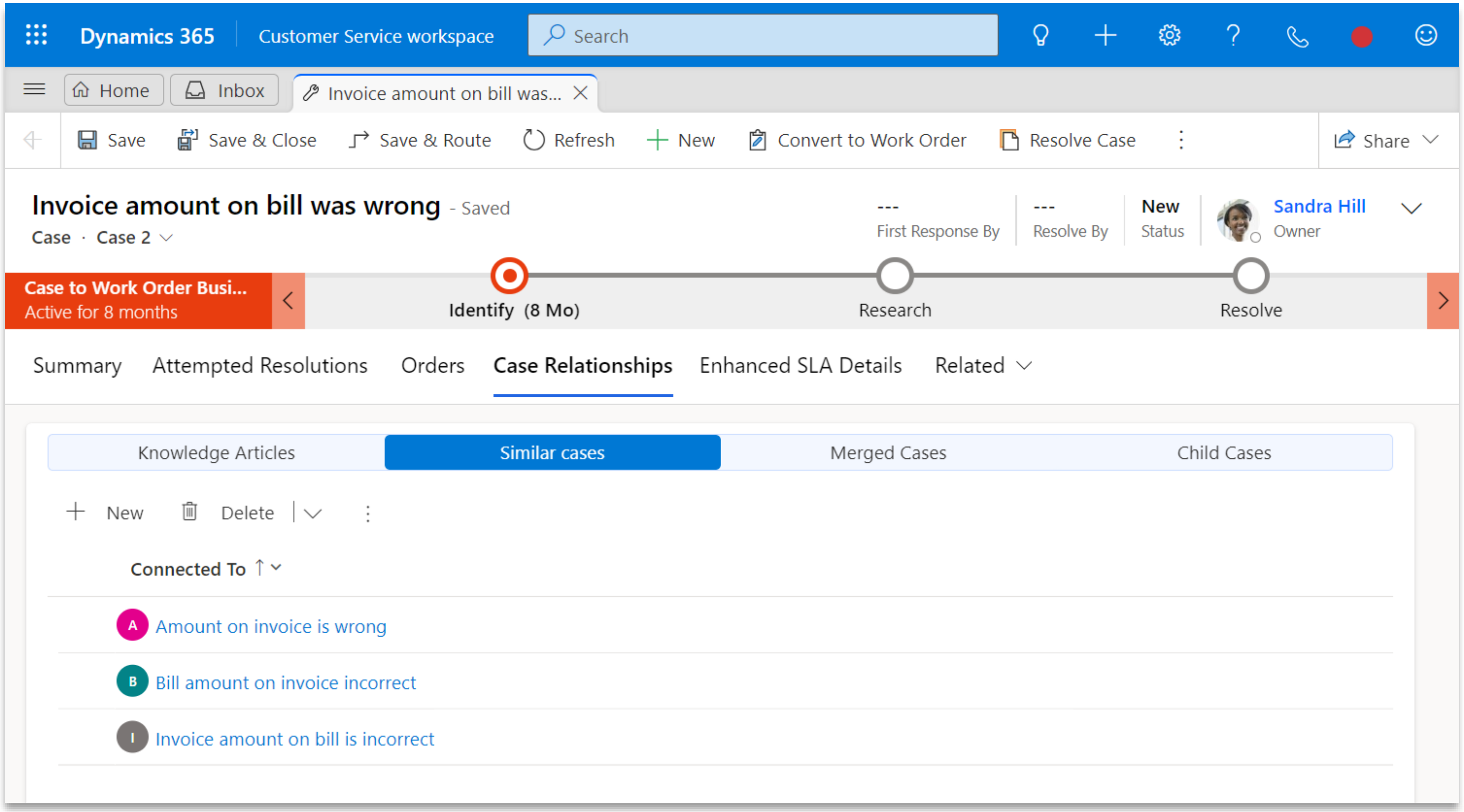
Show quick view form as card

- Add quick view form
- Select 'Show as Card' option



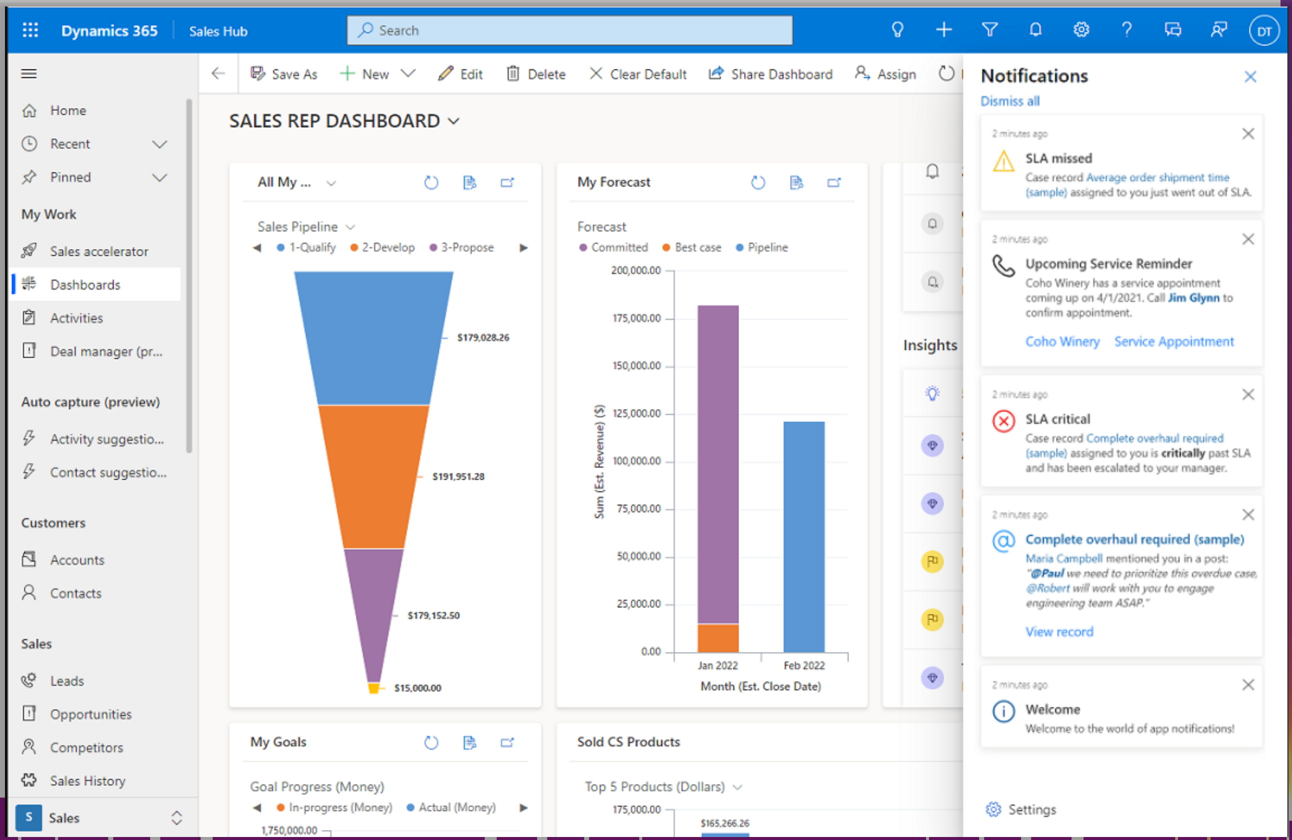
Associated Grid Control

- Refreshed Subgrid Control
- Add up to 4 tables
- Not just for cases!

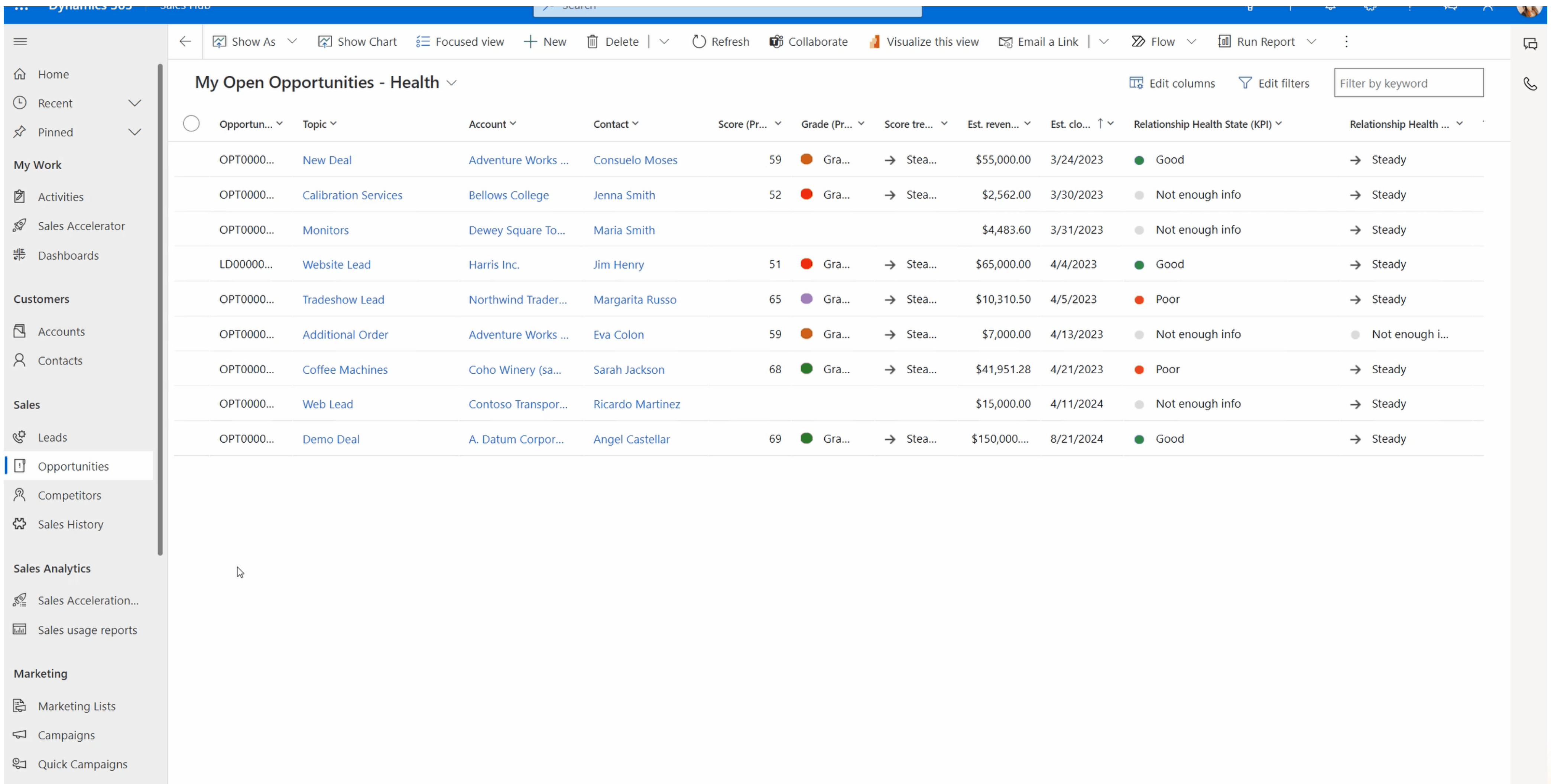


In-App Notifications

- Different from Push notifications
- Created by Power Automate Flows
- Use XRM Toolbox to create them easily



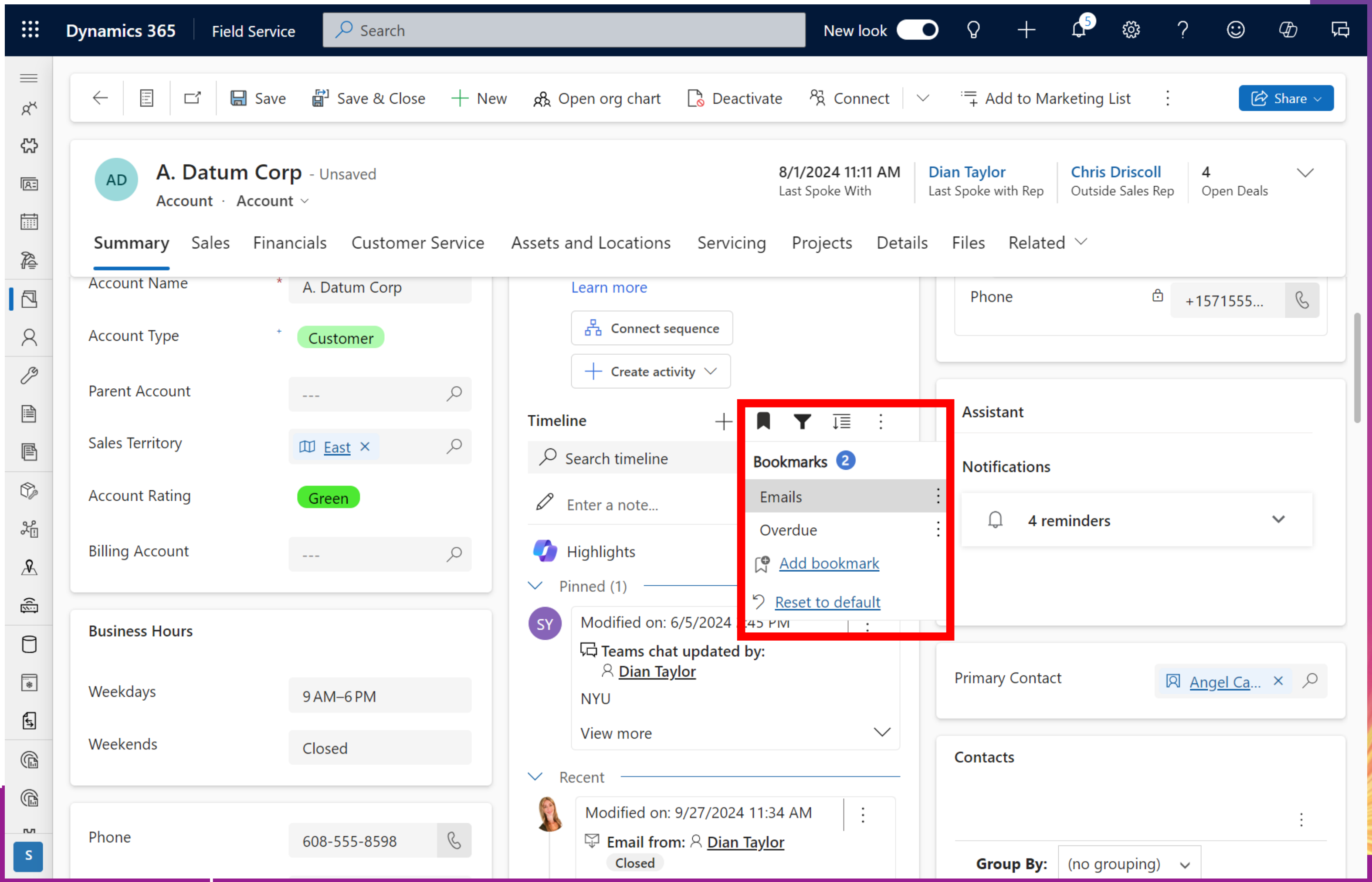
In-App Notifications



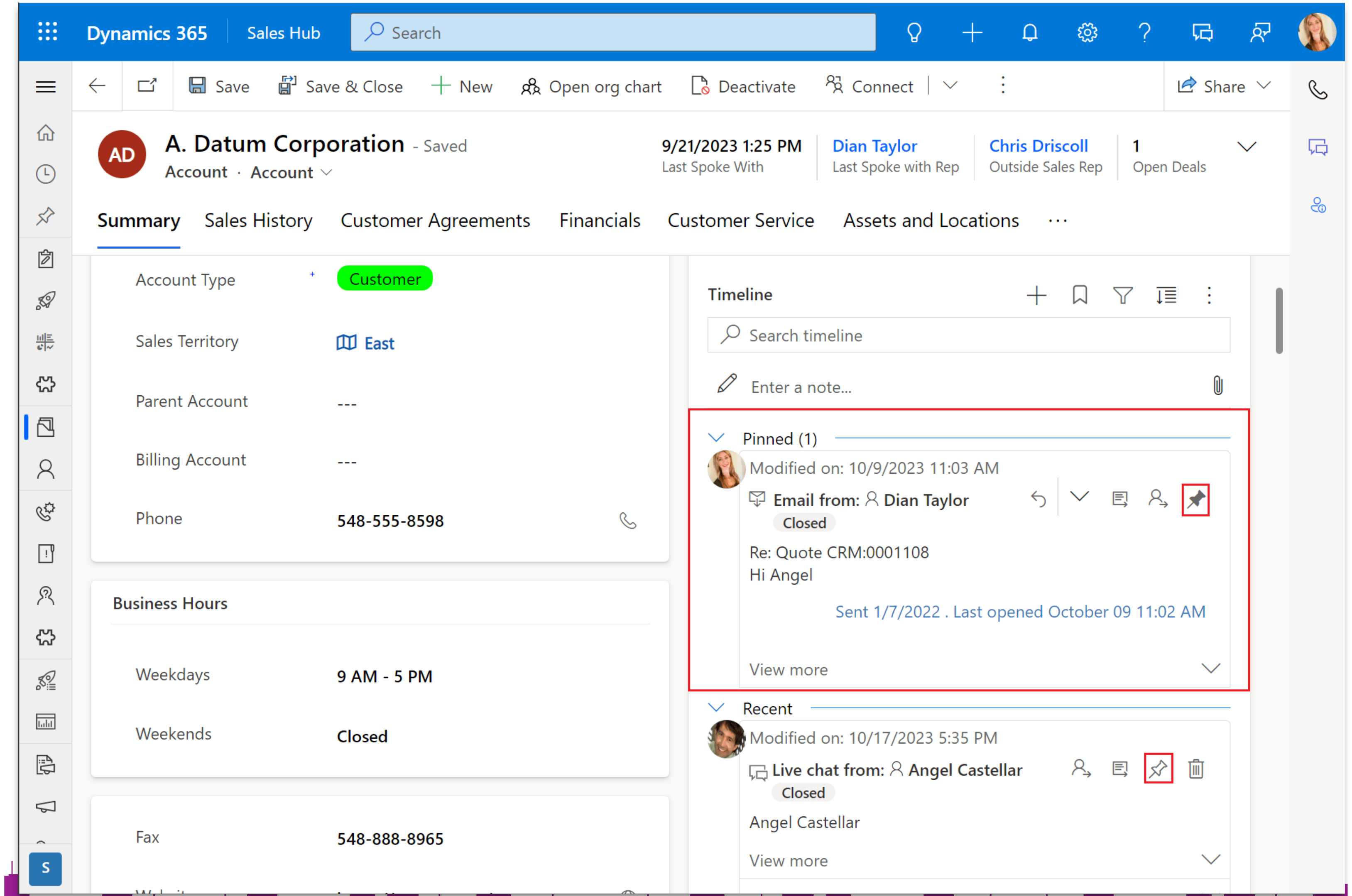
Demo 3

Bookmark Timeline View

- Filter underlying activities
- Create multiple bookmarks
- Personal view only

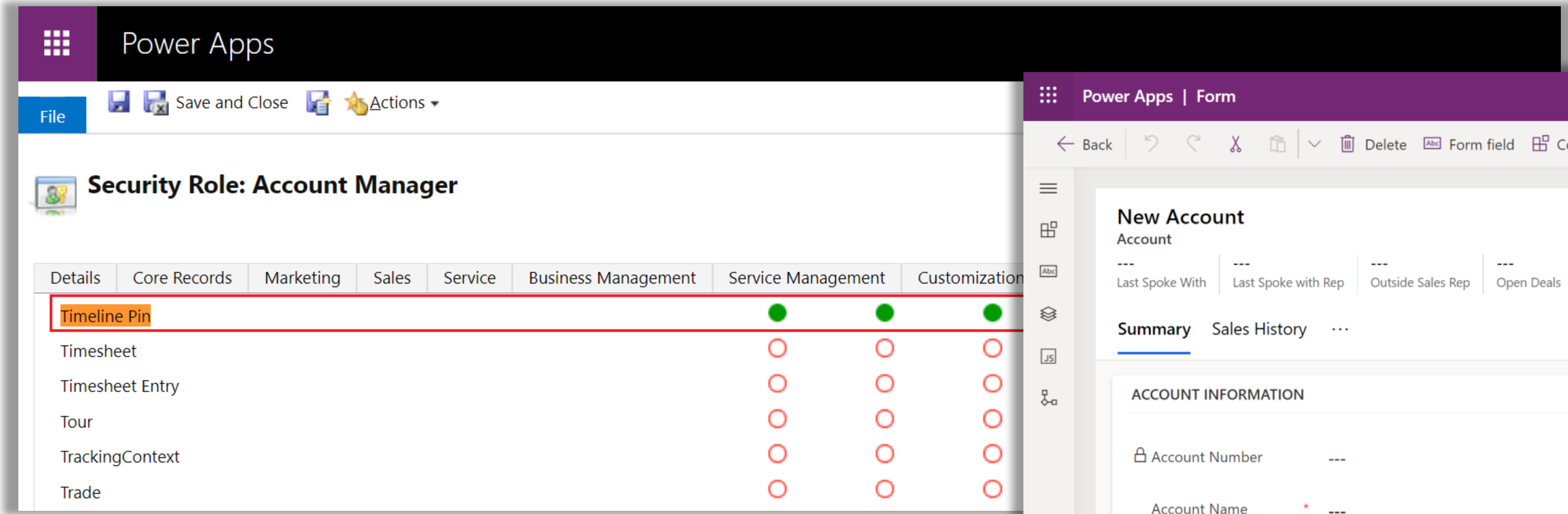


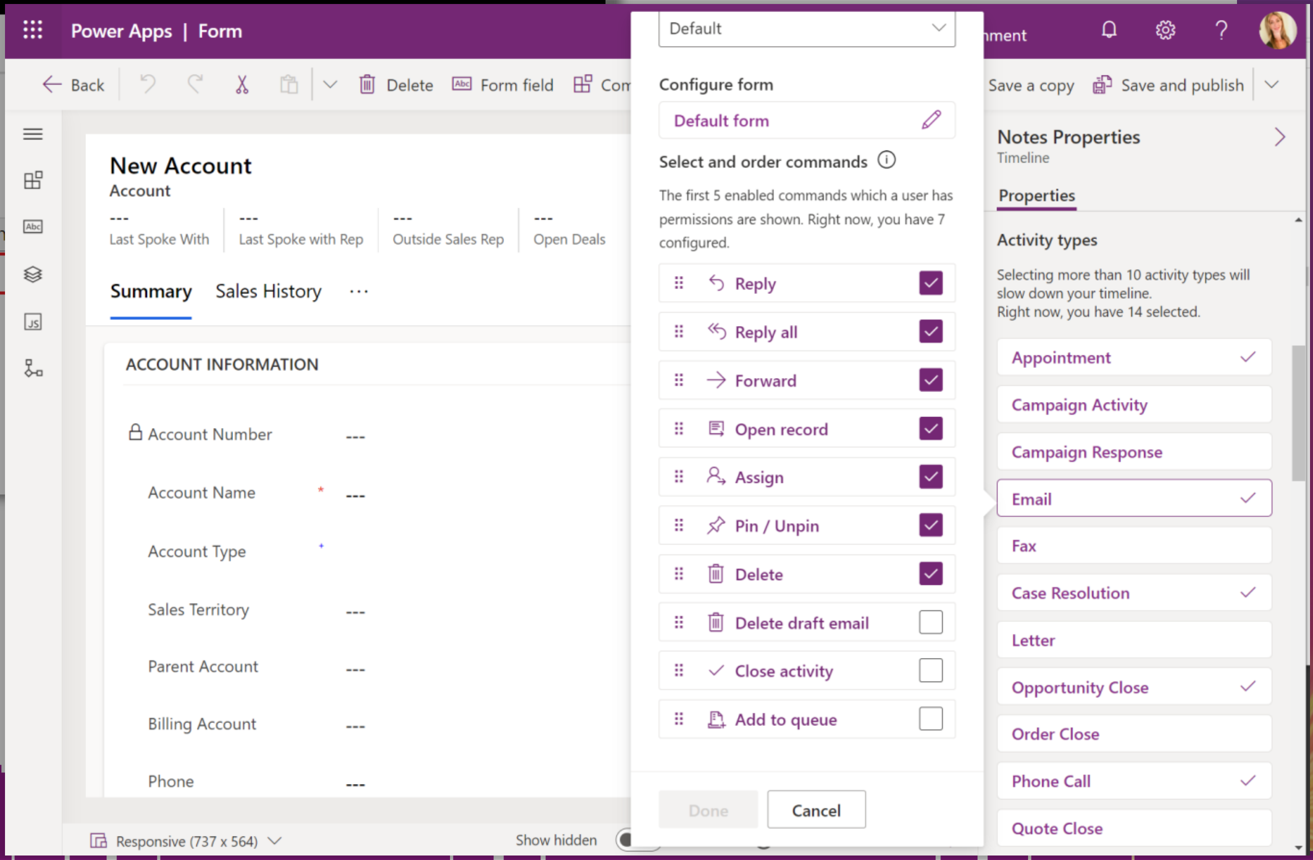
Pin Timeline Rows



Pin Timeline Rows

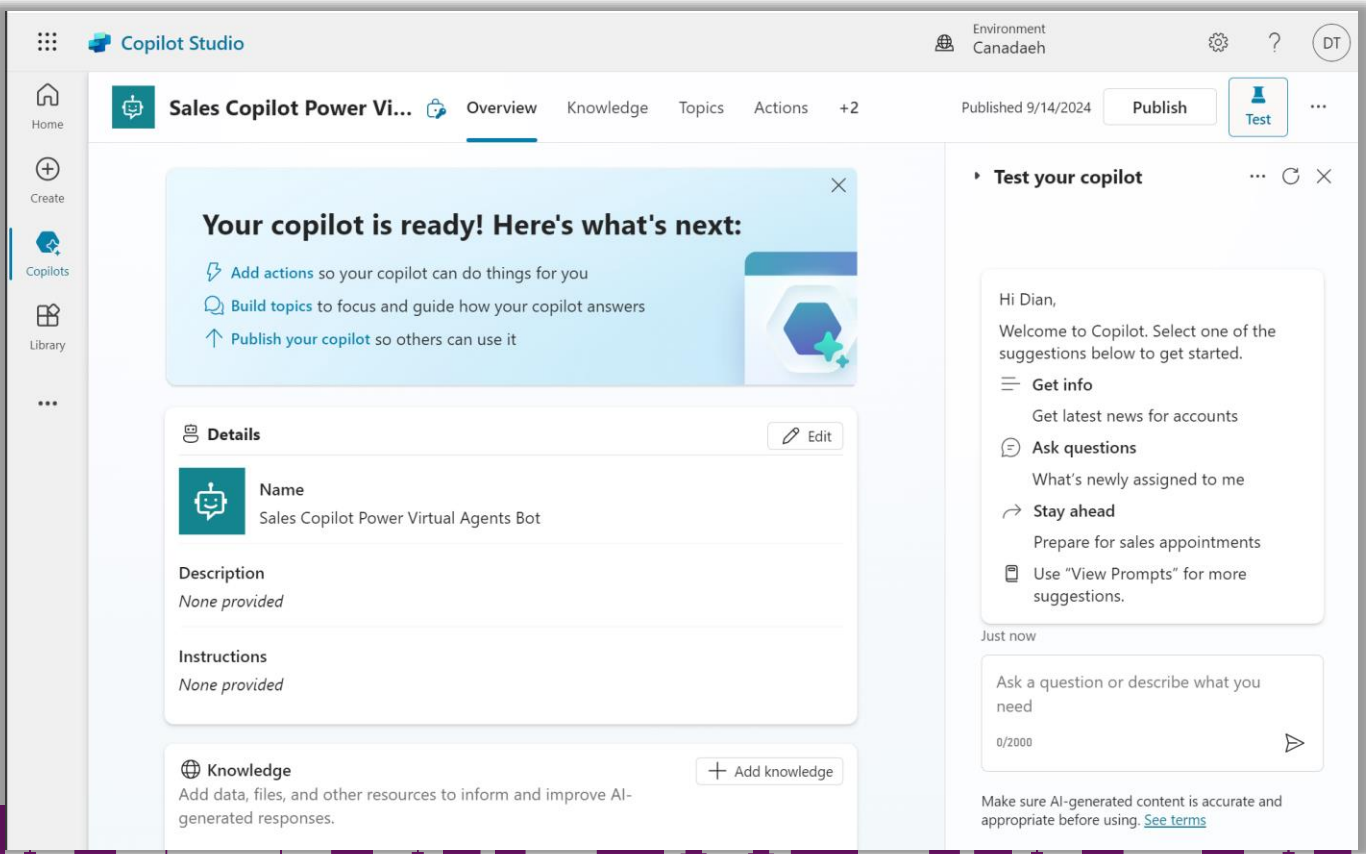
- Configure on timeline – Customer service feature
- Security Role: Timeline Pin





Extend Copilot in D365 Sales

- Copilot Studio
- Sales Copilot Power Virtual Agents Bot



SELFIE TIME!

Thank you for Attending!

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