DYNAMICSCON PRESENTATION

SEPTEMBER 14-16,
2022

Presenter Information

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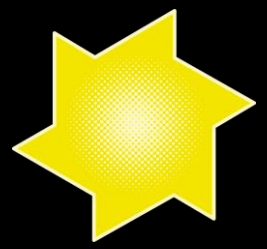
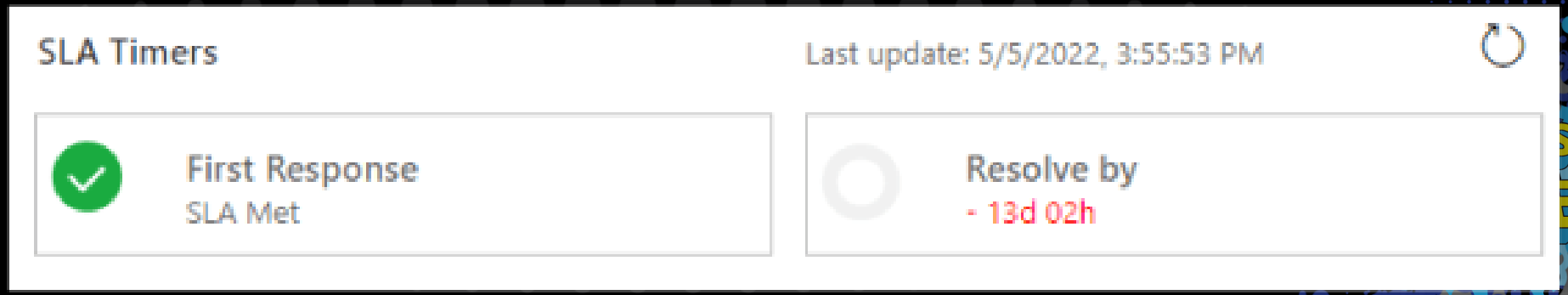
Agenda



- Configure custom status on SLA Timer
- D365 & Power Platform Release Planner(preview)
- Customer Service Admin: Quick setups
- Auto-Complete control
- Ad-hoc PowerBI Reporting in D365
- PowerApps read only grid control
- New Sales Reports in D365
- Duplicate detection for Leads(preview)
- Easy way to create Model Driven In-App Notifications

Configure custom status on SLA Timer

- **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 of the status in the SLA KPI Instance**



Configure custom status on SLA Timer

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D365 & Power Platform Release Planner(preview)

- New way to view release notes
- Portal experience
- Easier way to see what's coming, what's changed, etc.
- https://experience.dynamics.com/releaseplans/

Customer Service Admin: Quick setups

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

D365 & Power Platform Release Planner(preview) & Quick setups in CS

LIVE DEMO

Auto-Complete Control

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

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Auto-Complete Control

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Ad-hoc PowerBI Reporting in D365

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

Ad-hoc PowerBI Reporting in D365

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PowerApps read only grid control

- Read only grid
- Editable Grid
- Jump Bar

PowerApps read only grid control

LIVE DEMO

New Sales Reports in D365

- **Sequence Reporting**
  - Embedded PowerBI Report
  - Refreshes every 24 hours
- **Sales Usage Reports**
  - Opportunity Usage Reports
  - Lead Usage Reports

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New Sales Reports in D365

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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
  - Similar lead name and email domain

Duplicate detection for Leads(preview)

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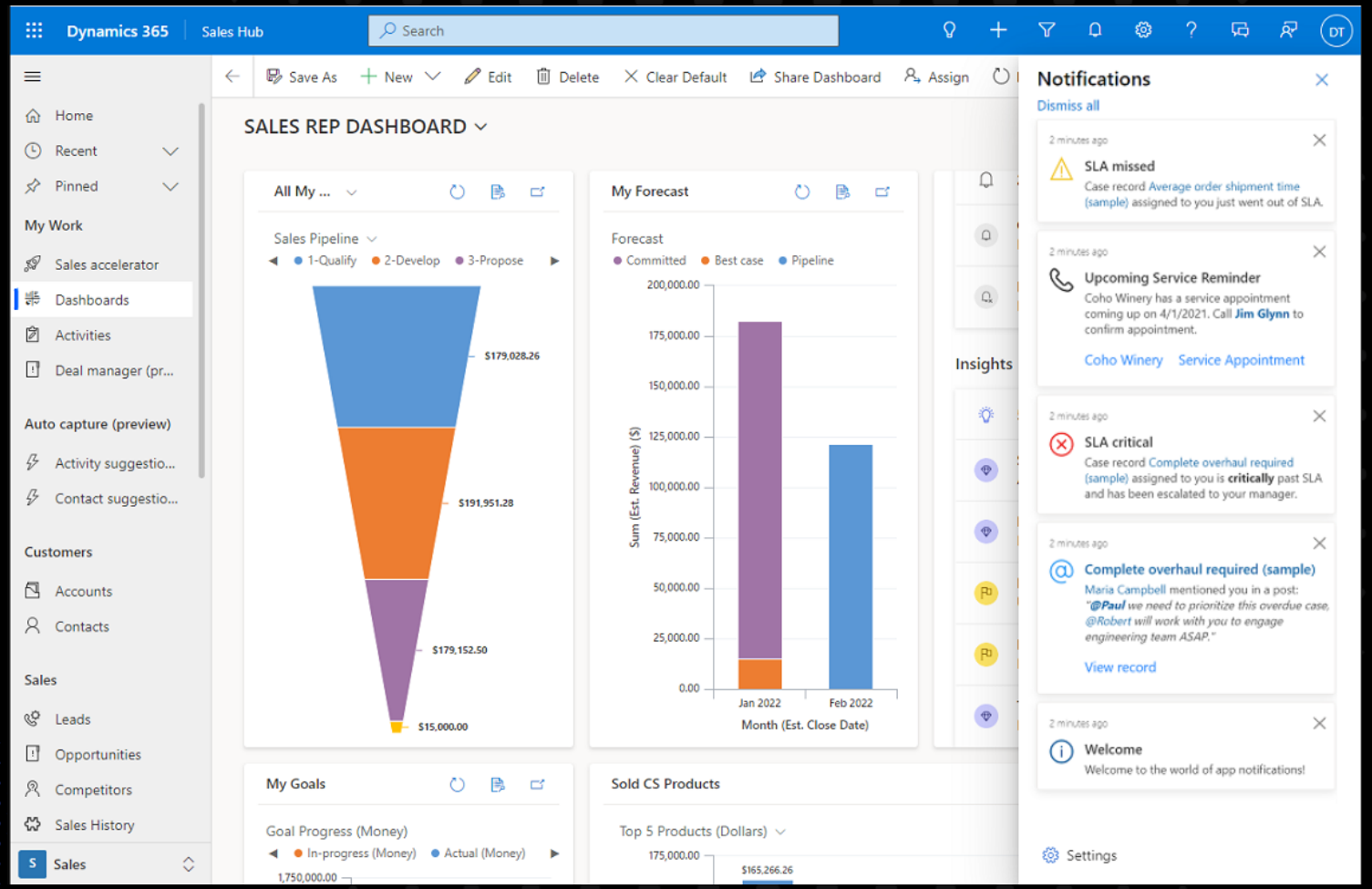
Easy way to create In-App Notifications

- Different from push notifications
- Use XRM Toolbox to create them easily

Model Driven In-App Notifications



Easy way to create In-App Notifications

LIVE DEMO

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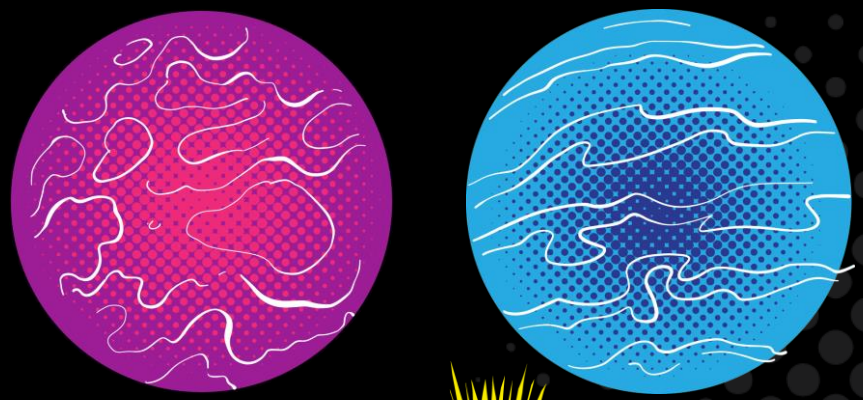

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