SEPTEMBER 14-16, 2022

50 Tips in 50 Minutes

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Tip #1

Follow Solution Management Best Practices

📁 Use solution files to package your changes and updates.

🪣 Use at least 2 environments (Sandbox & Production).

📄 Set up a prefix/publisher for your changes.

🗄️ In your solution file, don't include all components / metadata for tables, unless you need them.

⊞ Come up with a naming convention for workflows, flows, business rules, etc.

🧪 Have your users test & verify all changes.

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Tip #2

Form a Group of End Users

✓ **Create a team of End Users**
- o Super CRMers
- o Power App Ninjas
- o Champions
- o Early Adopters
- o Advocates

✓ **Include varied skill levels**

✓ **Involve this group right from the start**

Tip #3

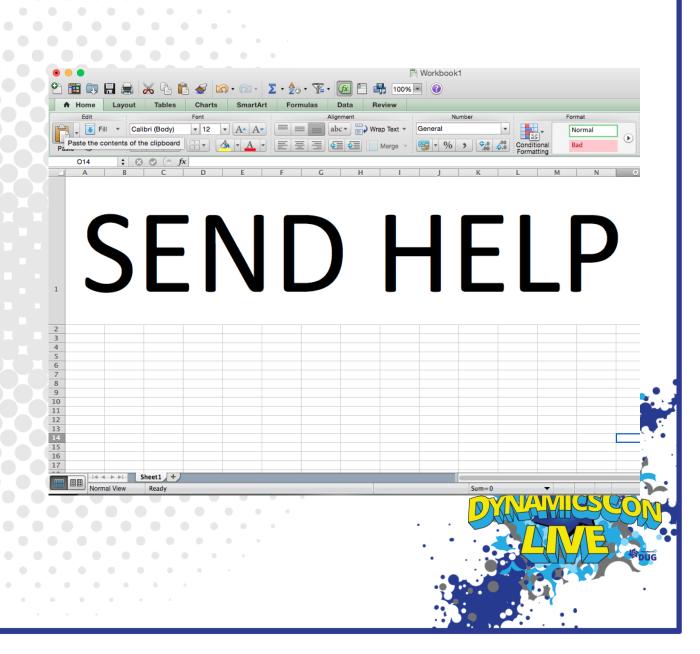# Include End Users in Requirements Phase

Tip #4

Find the user's pain!

- **Why aren't they using it?**

- **Your challenge: Find that pain!!**
  - Job shadow (Customer Service Reps, Inside Sales Reps)
  - Ride along (Salespeople)
  - *Hint*: Look for manual Excel reporting they are providing to their manager!

- **Automate the pain**
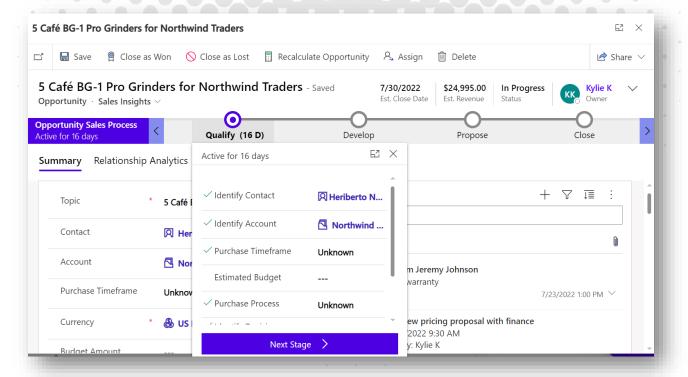 - Use the technology in D365 & Power Platform to solve their issue!

SEND HELP

Tip #5

Streamline your business processes

- **Available tools:**
  - Business Process Flows
  - Power Automate

Tip #6
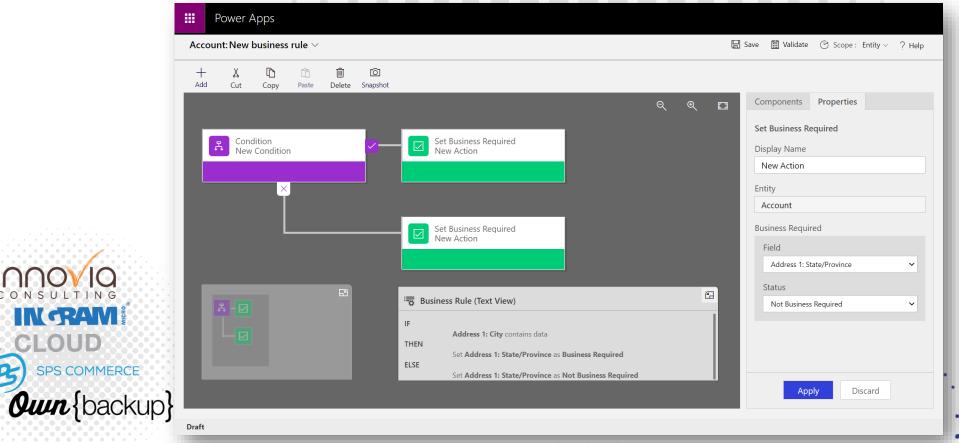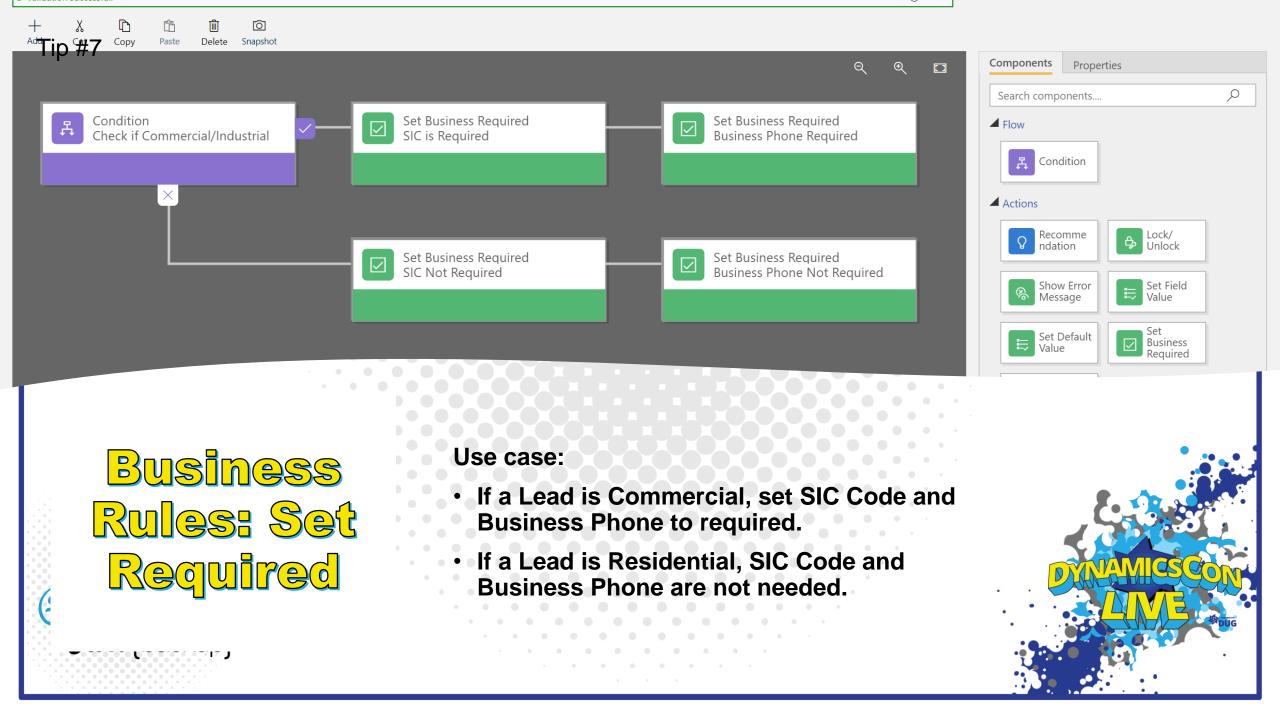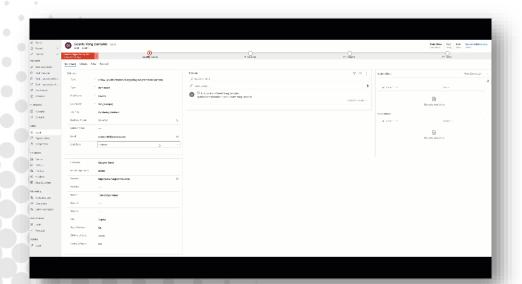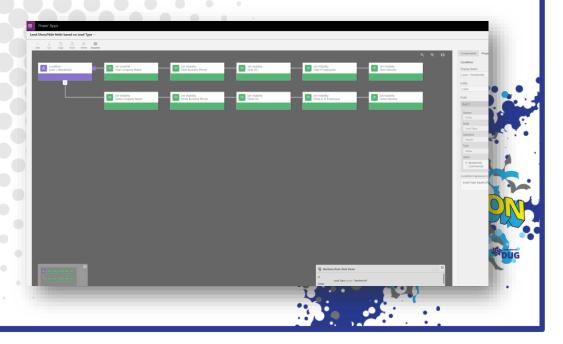
Minimize required fields on a form

- **Business Rules**

Tip #7

Business Rules: Set Required

Use case:

- **If a Lead is Commercial, set SIC Code and Business Phone to required.**

- **If a Lead is Residential, SIC Code and Business Phone are not needed.**

Tip #8

Business Rule : Set Visibility

Example:

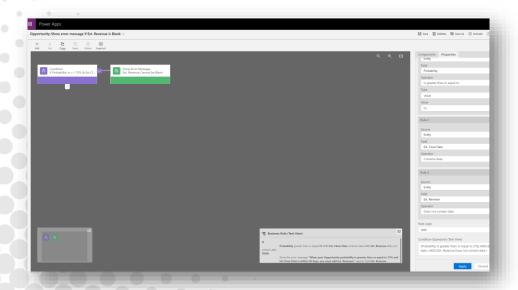**If a Lead is Residential, hide SIC Code, Industry, No. of Employees, Company Name and Business Phone fields.**
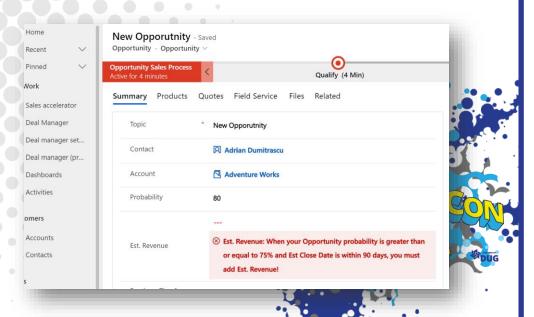
Tip #9

Business Rule: Show Error Message

Example:

If Opportunity Probability is greater than or equal to 75%, Est Close Date has a value, but Est Revenue is blank, show an error message.
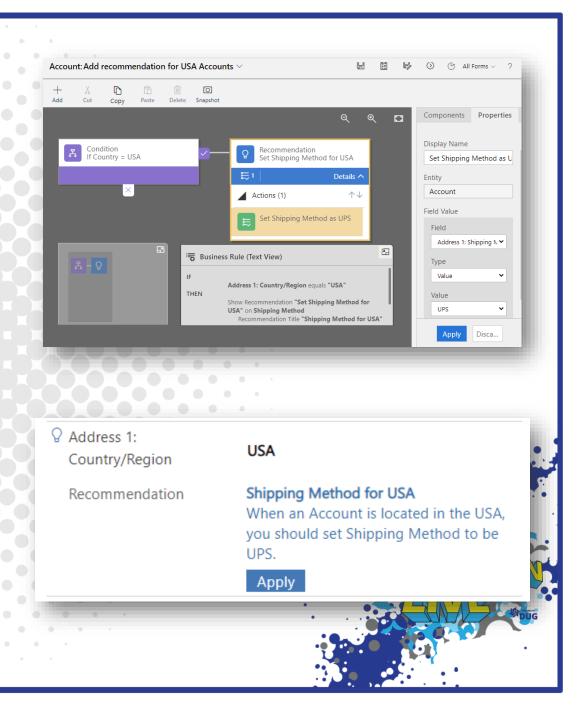
Tip #10

Business Rule:
Add Recommendation

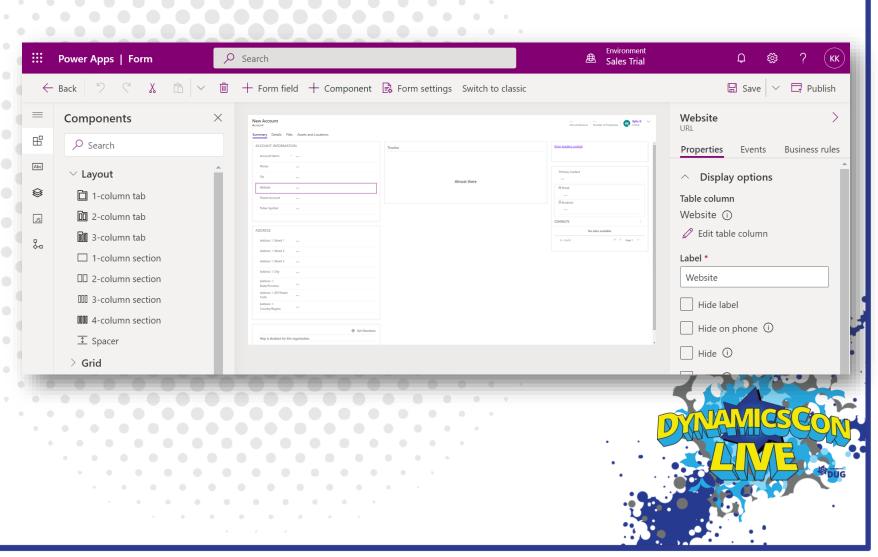**If Account Country = USA, add recommendation to set shipping method as UPS.**

Tip #12
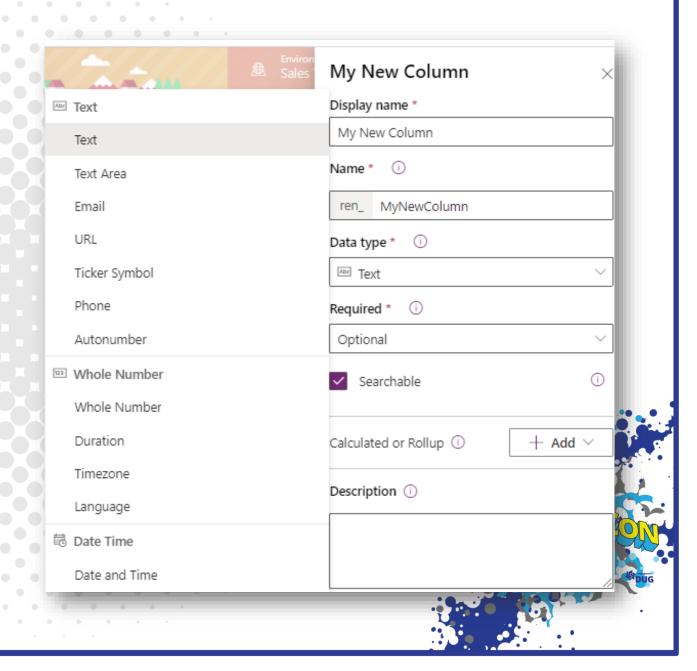
Pick the right column (field) type

- **Many types**
  - Text
  - Whole Number
  - Date & Time
  - Choice *(option set)*
  - Choices *(multi-select option set)*
  - Currency
  - Customer lookup
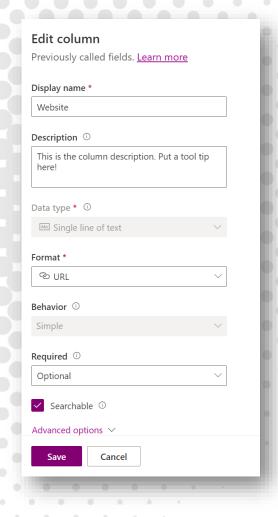 - & Many more!
- **Cannot change type after saving!**

Tip #14

Use Calculated Fields

- **Automate manual calculations**
  - Example: Full Name = First Name + Last Name
  - Example: Net Worth = Assets – Liabilities on an Account
- **Column types that support calculations:**
  - Text
  - Choice
  - Yes/No
  - Whole Number
  - Decimal Number
  - Currency
  - Date Time
- **BEST PRACTICE TIP! Make your calculated fields READ ONLY.**

An Example:

Scenario:
If an Opportunity is rated 4 or 5 stars, AND estimated revenue is >= $5,000, we want to set an activity due date in 7 days. Otherwise, activity due is in 1 month.

CALCULATED FIELD

Set Activity Due

⊿ IF...THEN

⊿ CONDITION (OPTIONAL)

If **(Current Entity) Rating** is greater than or equal to **4**
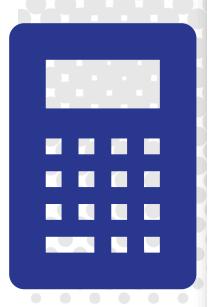
and **(Current Entity) Est. Revenue** is greater than or equal to **5000**

➕ Add condition

⊿ ACTION

Set **Activity Due** to AddDays(7, Created On)

⊿ ELSE

⊿ CONDITION (OPTIONAL)

➕ Add condition

⊿ ACTION

Set **Activity Due** to AddMonths(1, Created On)

Tip #15

Use Rollup Fields

- **Aggregate values calculated over related records.**
  Similar to using sum, min, max and count in Excel.
  - Example: Rollup of all open Opportunities on an Account.
  - Example: Total of all open Cases linked to an Account.

- **Aggregate using the following functions:**
  - Sum
  - Count
  - Min
  - Max
  - Avg

- **You can use a calculated column in your rollup.**

- **Calculations run asynchronously in the background by scheduled system jobs.**

- **They can also be manually updated on the form.**

An Example:

Scenario: The count of All Opportunities should be listed on the Account form.

ROLLUP FIELD

Total Opportunities

SOURCE ENTITY

Source: **Account**

Use Hierarchy: **NO**

RELATED ENTITY

Related: **Opportunities (Account)**

FILTERS (OPTIONAL)

+ Add condition

AGGREGATION

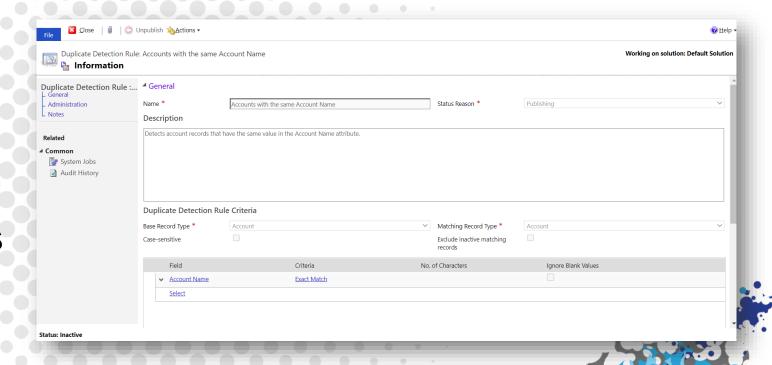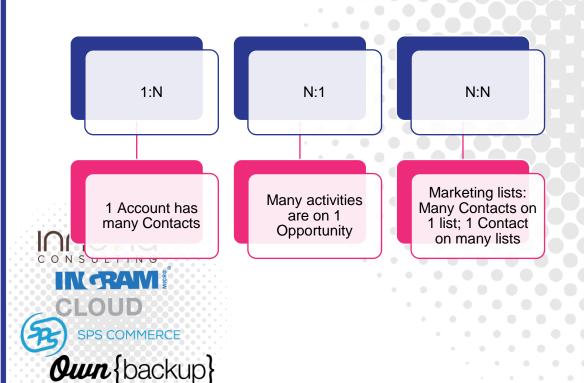**COUNT** of **Opportunity**

Tip #17

Table Relationships Matter!

- **Maker Portal has limited functionality – Switch to Classic for more capabilities**
  - Update relationship behavior / cascade settings
  - Mappings
  - Change requirement levels

1:N — 1 Account has many Contacts

N:1 — Many activities are on 1 Opportunity

N:N — Marketing lists: Many Contacts on 1 list; 1 Contact on many lists

Power Apps:

Classic:

Tip #18

Customize your 1:N / N:1 Field Mapping

- **Map field values from one table to another**

- **Example: Lead to Opportunity**
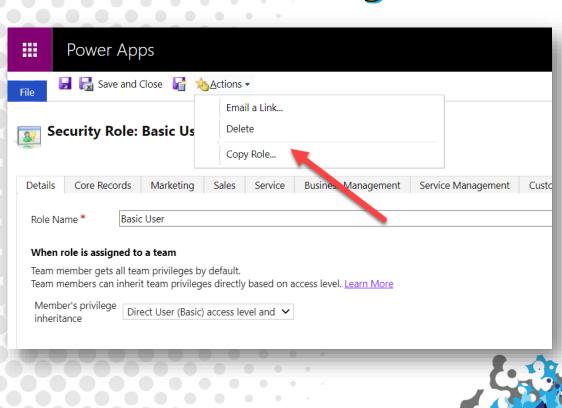
Switch to Classic!!!
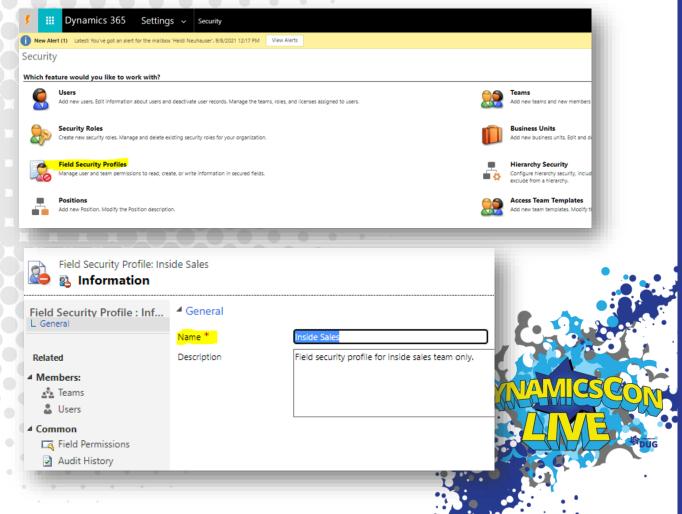
Field Security Profiles lock down specific column access for specific users

- Enable field security on a field (column) within an entity (table).

- **Associate an existing security profile(s).**

- **Use Field Permissions to define secured fields access.**
  - **Read**: Read-only access to the field's data.
  - **Create**: Anyone in this profile can add data to this field when creating a record only.
  - **Update**: Anyone in this profile can update the field's data after it has been created.

Tip #21

Power Apps + Outlook = ❤️
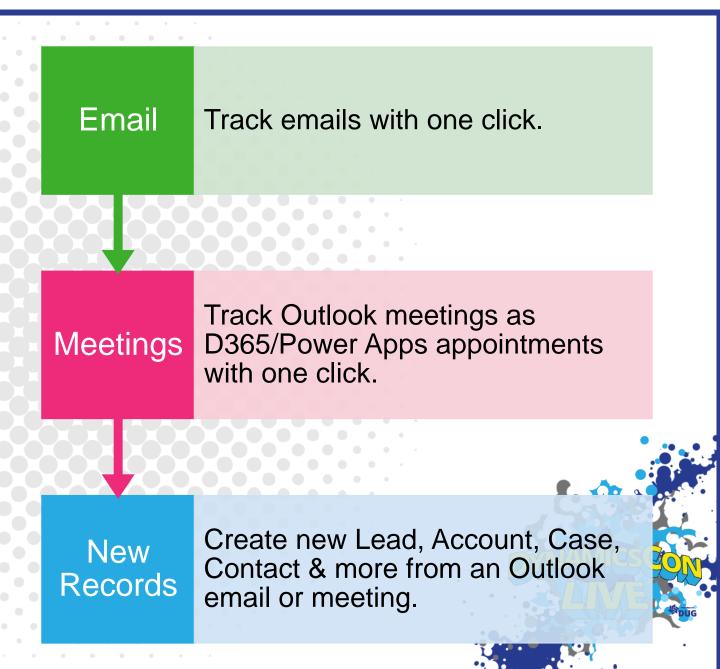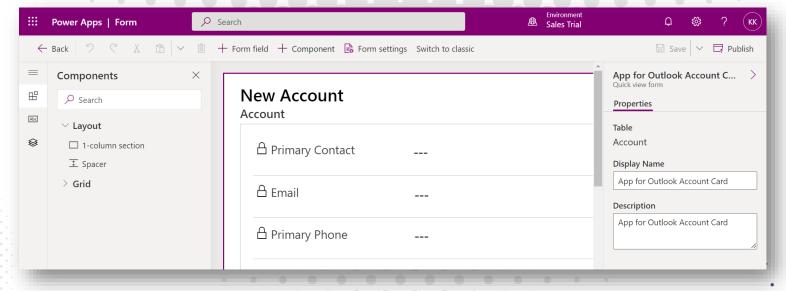
Configure the Dynamics 365 App for Outlook

Email — Track emails with one click.

Meetings — Track Outlook meetings as D365/Power Apps appointments with one click.

New Records — Create new Lead, Account, Case, Contact & more from an Outlook email or meeting.

Customize Forms in App for Outlook

- **Update the form Quick View App form Outlook Form to determine which fields are displayed on when an email is tracked**
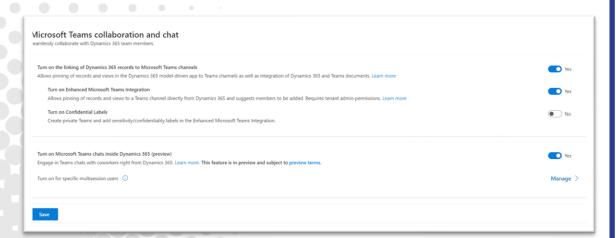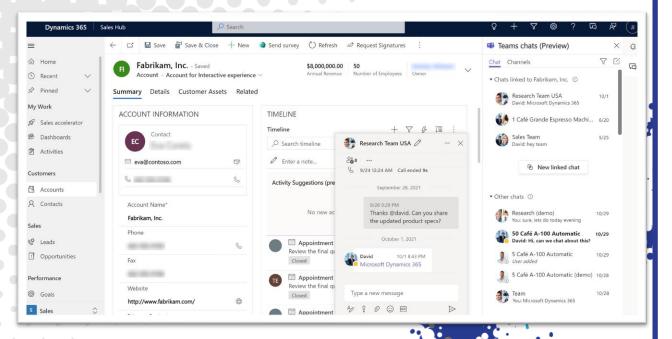
Tip #23

Set Up Microsoft Teams Integration

- **Enhanced collaboration**

- **Dynamics 365 data in Teams Channels**

- **Teams chat in Dynamics 365**

- **Even more, coming soon!**

Tip #24

Know Your Form Types

Form Type	Details	Example
Main	These forms provide the main user interface for interacting with data.	
Quick Create	A basic form with limited fields, optimized for fast creation of a new record.	
Quick View	Displays additional data for a related record – referenced by a lookup field on the form.	
Card	Present information in a compact format that displays well on a mobile device.	

Tip #25

Global Search: Add/Remove Tables (Entities)
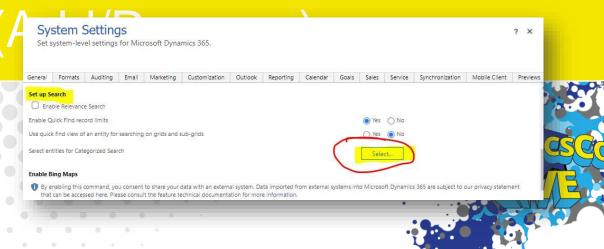
Switch to Classic!!!

Settings > Administration

System Settings > General Tab

Select entities
(Add/Remove)

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System Settings
Set system-level settings for Microsoft Dynamics 365.

General | Formats | Auditing | Email | Marketing | Customization | Outlook | Reporting | Calendar | Goals | Sales | Service | Synchronization | Mobile Client | Previews

Set up Search

☐ Enable Relevance Search

Enable Quick Find record limits   ◉ Yes ○ No

Use quick find view of an entity for searching on grids and sub-grids   ○ Yes ◉ No

Select entities for Categorized Search   [Select...]

Enable Bing Maps

ⓘ By enabling this command, you consent to share your data with an external system. Data imported from external systems into Microsoft Dynamics 365 are subject to our privacy statement that can be accessed here. Please consult the feature technical documentation for more information.

Tip #27

Automate Manual Tasks with Power Automate

- **Extend Dynamics 365 well beyond CRM with 800+ Microsoft-certified connectors**
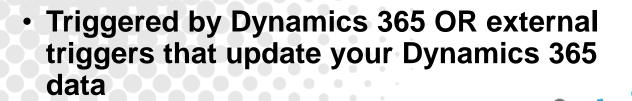
- **Triggered by Dynamics 365 OR external triggers that update your Dynamics 365 data**
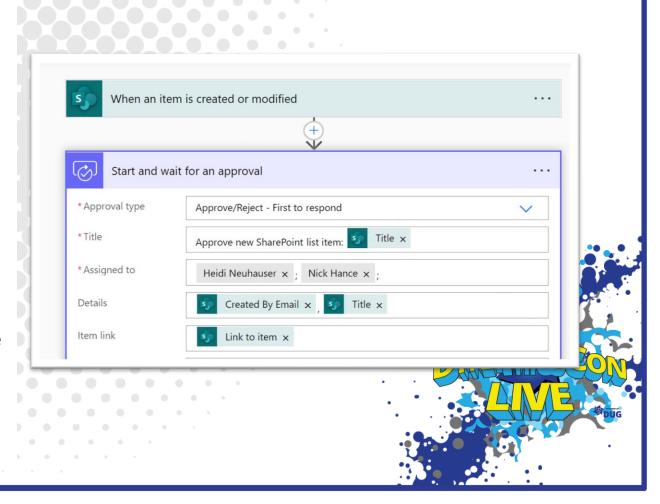
Power Automate Approvals
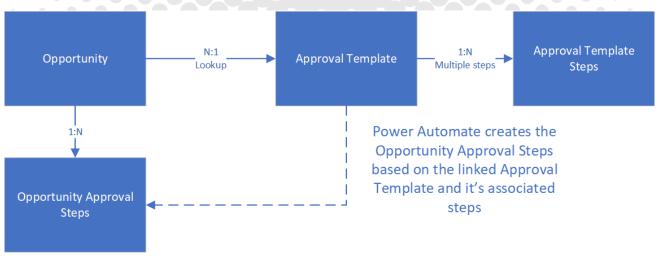
- Use Approvals to automate any approvals in your organization

- 4 Approval Types:
  1. Approve/Reject: Everyone must approve
  2. Approve/Reject: First to respond
  3. Custom Responses: Wait for all responses
  4. Custom Responses: Wait for one response

Use Approval Templates

- **Create an "Approval Template" Table in your environment to control multiple levels of Approvals**
- **Allows Approvers to be changed with data instead of modifying the Flow**

Tip #30
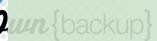
Create a Variety of Training Materials

- **People learn differently**
- **Differentiate your content to reach more learners**

Visual Learners	Aural Learners	Reading & Writing Learners	Kinesthetic Learners
• Live training • Graphs • Diagrams • Flow charts • Demo • Webinar	• Live training • Lecture • Discussion Groups • Webinar • Videos • Podcasts	• Live training • PowerPoint • Quick Reference Guides • Job Aids • Labs • Handouts	• Live training • Demos • One-on-one / small group • Coaching • Labs • Case studies

Deliver Role-Based Training

- **Group users based on job role**
- **Core training topics for all users with specific training topics for different roles**

Sales Users
- Sales Hub / custom app
- Lead to Opportunity Process
- Qualifying & Disqualifying Leads
- Winning & Losing Opportunities

Service Users
- Service Hub / custom app
- Case Management Process
- SLAs & Escalation Process
- Knowledge Base

Marketing Users
- Marketing app
- Campaigns
- Marketing Lists

✓ **Navigation**
✓ **Search**
✓ **Changing Views**
✓ **Sorting**
✓ **Filtering**
✓ **Advanced Find**

Tip #32

Offer Ongoing Learning Opportunities

Avoid the "Big Bang" training approach

Training isn't just at Go Live

Possible ideas:

- Lunch & Learn
- Tips & Tricks
- D365 Newsletters
- Video Library

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Security: Check Team Inheritance Setting

- **Team Privileges Only: Role is in context of the Team**

- **Direct User (Basic) access level and Team Privileges: Role is in context of the team and user!**

When role is assigned to a team

Team member gets all team privileges by default.
Team members can inherit team privileges directly based on access level. Learn More

Member's privilege inheritance

Direct User (Basic) access level and ▼

Team privileges only
Direct User (Basic) access level and Team privileges

Security: Remove Delete for EVERYTHING
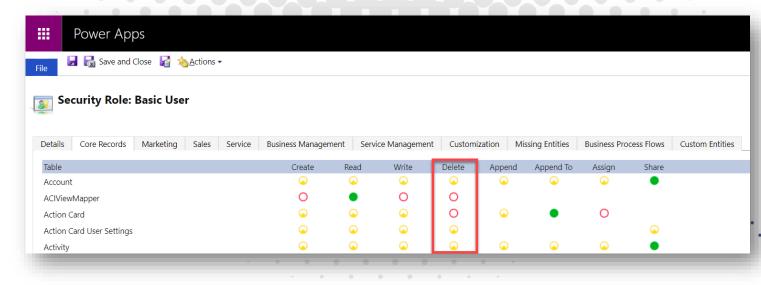
- **Train users to Deactivate instead**

- **Delete should not be needed in most cases**

- **Bonus Tip:** **Click on the column or row in a Security Role to change all permissions at once!**

Security: Remove Sharing

- **Do you really need this?**

- **Creates overhead and potential performance impact if used as a basis for security**

- **Clean up the ribbon and remove access**

Tip #36

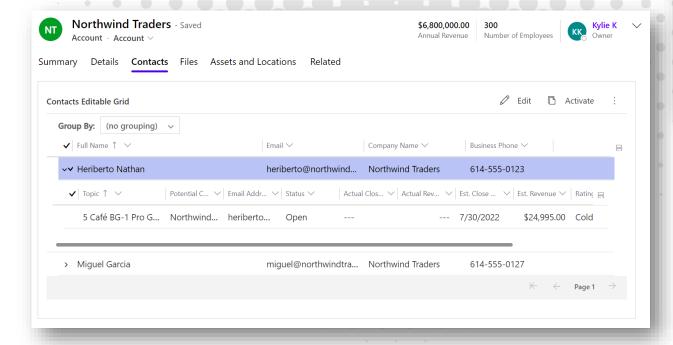# Security: Check for Dangerous Permissions

- **Bulk Delete**
- **Bulk Edit**
- **Export to Excel**

Privacy Related Privileges

Enabling these privileges will allow users to extract customer data from Microsoft Dynamics 365. For more information, review the corresponding user documentation.

Document Generation	●	Dynamics 365 for mobile	●
Export to Excel	●	Go Offline in Outlook	●
Mail Merge	●	Print	●
Sync to Outlook	●	Use Dynamics 365 App for Outlook	●

Miscellaneous Privileges

Act on Behalf of Another User	○	Approve Email Addresses for Users or Queues	○
Assign manager for a user	○	Assign position for a user	○
Assign Territory to User	○	Bulk Edit	●
Change Hierarchy Security Settings	○	Dynamics 365 Address Book	●
Enable or Disable Business Unit	○	Enable or Disable User	○
Language Settings	○	Merge	●

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Tip #38
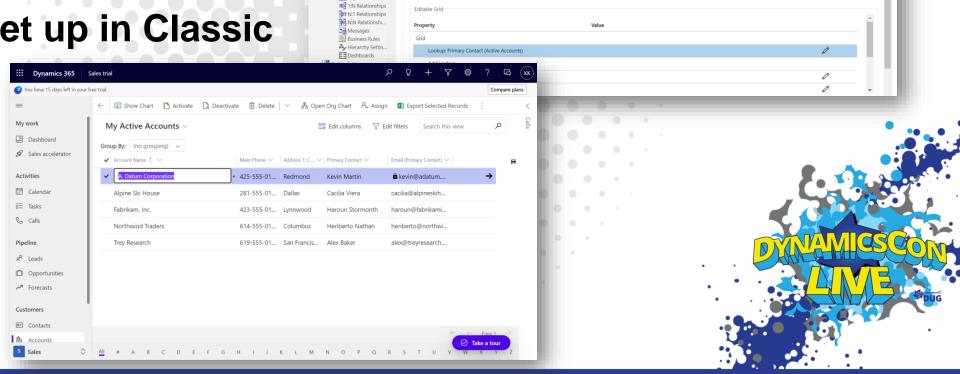
Editable Grid – Enable for a Table

- **Editable Grid can be set up for views from the main workspace!**

- **Must be set up in Classic**
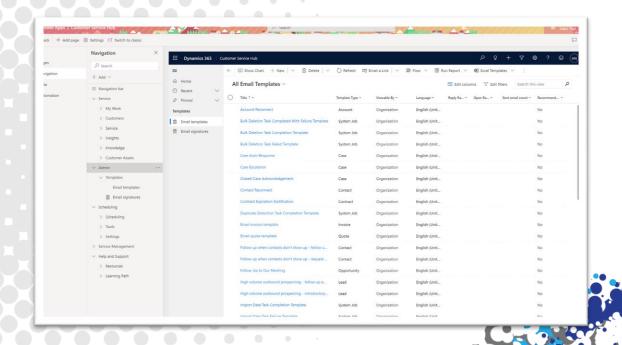
Add an Admin Area to Your App Navigation

- **Add an Admin area for less used items**

- **Navigation > +Add > Area**

Add Pages to Enhance your App

1. Click the Pages icon
2. Click + Add page
3. Select page type from the list
4. Click Next
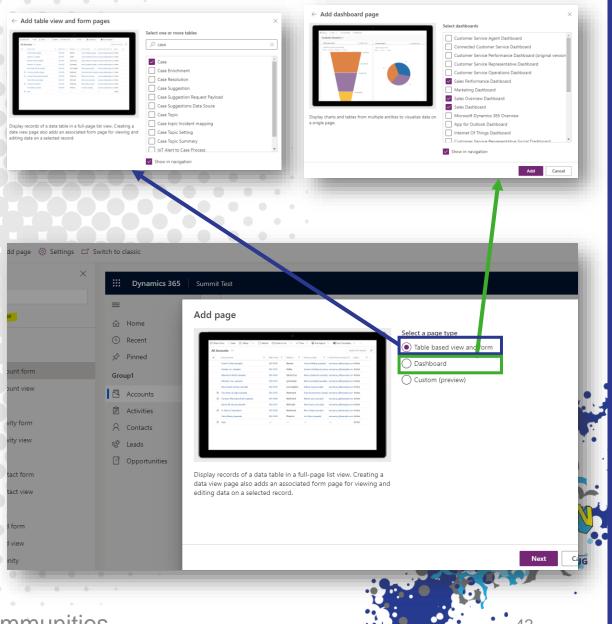5. Select Details
6. Click Add

Use the XrmToolBox

- Go to www.xrmtoolbox.com & download the latest version

- Install the XrmToolBox

- Connect your instance(s)
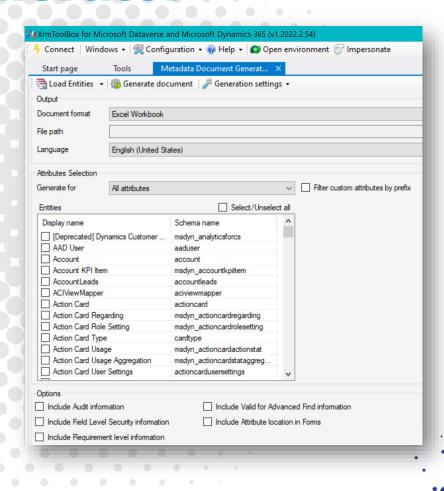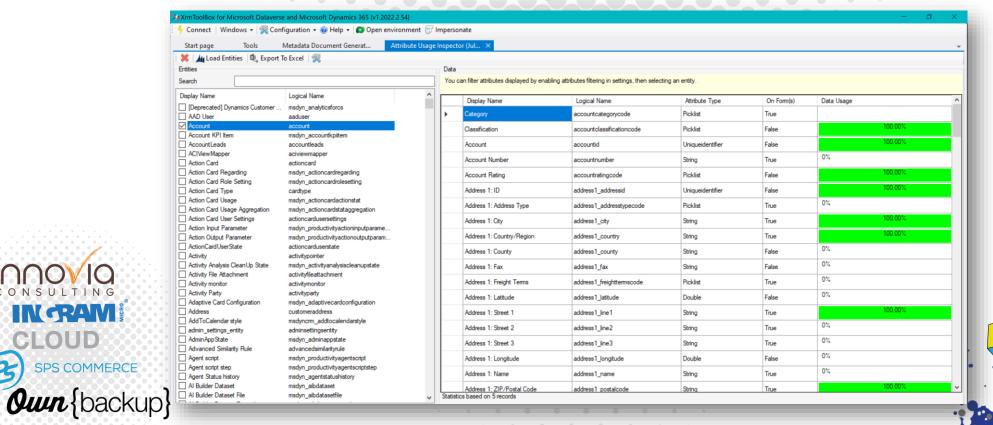
Find Fields not in use

- **XrmToolBox: Attribute Usage Inspector**

Set User Settings for them

- XrmToolBox: User Settings Utility

- Set # of records in Views

- Set Email Tracking Options

Tip #45

Other Great Community Resources

👤 [Local User Groups](#)

✉️ [Power Platform Weekly Newsletter](#)
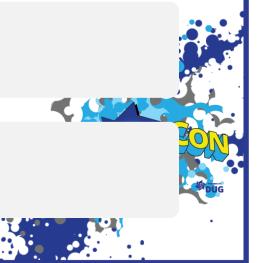
📷 [PCF Gallery](#)

✔️ [Connector Review](#)

Tip #48

Read the Release Notes Table of Contents
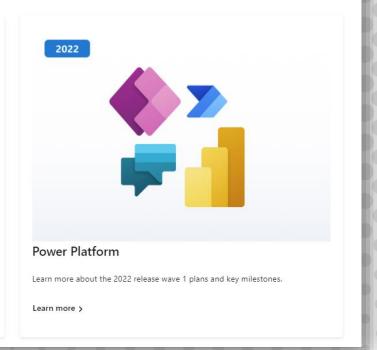
Release plans

Dynamics 365

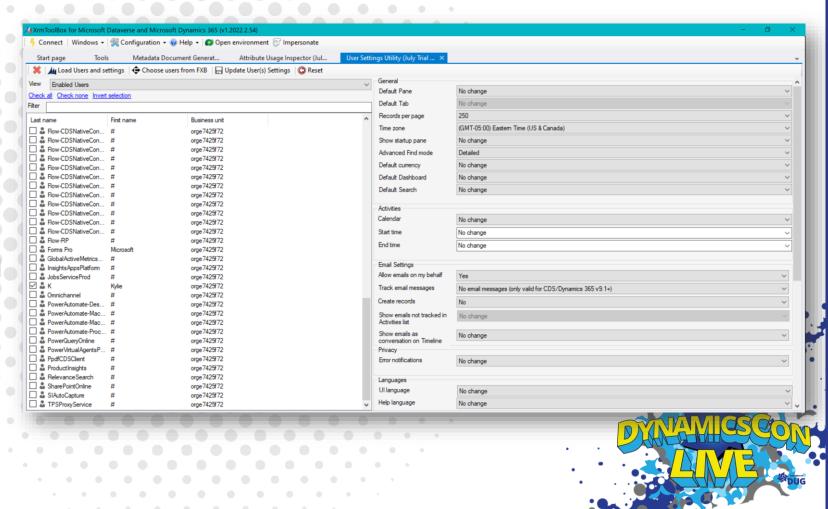Learn more about the 2022 release wave 1 plans and key milestones.

Learn more >

Power Platform

Learn more about the 2022 release wave 1 plans and key milestones.

Learn more >

- [Link to all Release Plans](#)

- 2022 Release Wave 2 Plane (October 2022 - March 2023 Updates):
  - [Power Platform](#)
  - [Dynamics 365](#)

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Turn on New Features

- **Test your upgrades in a development environment**
- **Power Platform Admin Center > Environment > Settings > Features**
- **Make.Preview.PowerApps.com**

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🐦 @CRMHeidi

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🐦 @KylieKiser

▶ YouTube.com/KylieKiserPowerPlatform

Questions?

Bonus Tips

Configuration Table

- **Create Configuration Table to hold data needed by Power Automate**
- **Put anything here that might change so it can be easily updated without modifying the automation**

Solutions

- **Use Solutions to move configuration and automation between environments**
- **Managed Solutions is the recommended Approach**

CoE Starter Kit

- **Use the Center of Excellence Starter Kit to help with ALM, User Adoption, and More!**

- https://docs.microsoft.com/en-us/power-platform/guidance/coe/starter-kit

AI Builder

- **Use AI Builder to infuse AI into your processes**
- **Includes pre-built and ready to use models and models that can be trained**

Embedded Canvas Apps

- **Want more flexibility in your Model-Driven Apps? Create a Canvas App and embed it!**

Embed Power BI Dashboards in Dynamics

- Give users a one-stop place for all their data
- Add Power BI Dashboards as Dynamics 365 System or Personal Dashboards
- Must be enabled in Power Platform Admin Center for each environment
- Users must have direct access to the Dashboard (not just workspace)

Custom Many to Many Relationships

- **Use OOB Many to Many Relationships or you can create an intersect table to hold details about this relationship**

- **Keep date relationship was added, status, etc.**