

A DYNAMICSCON PRESENTATION

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# DYNAMICSCON VIRTUAL

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FINANCE &  
OPERATIONS

[DYNAMICSCON.COM](https://DYNAMICSCON.COM)

# Saving my View on Saved Views

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## About me

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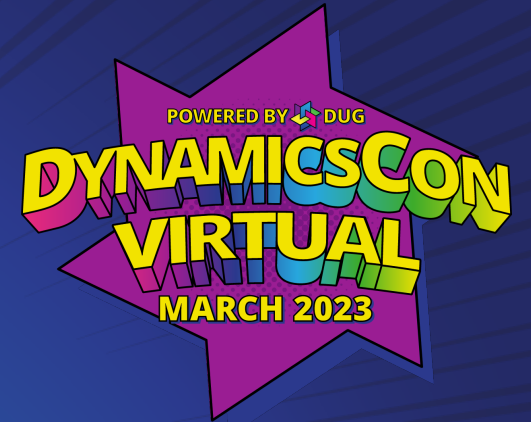
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# Objectives

- Understand benefits of personalization and Saved Views
- Understand the caveats of Saved Views and personalization
- Learn how to distribute Saved Views in your organization
- Learn options how to distribute Saved Views in coding





Dynamics 365  
F&O is  
overwhelming

Don't need  
all fields  
and features

Too many  
clicks

Not  
intuitive

Need efficient  
user interface

# Less is more

Adjust user experience by

- Security role implementation
- Configuration keys
- Personalization



# Saved views to manage form layout

- Hide content (fields, menu items, factboxes)
- Rename fields and menu items
- Rearrange controls
- Width and grouping on grids
- Set as required
- Lock for editing
- Skip tab key sequence
- Tab state
- Show in header
- Add Power App and website

# Saved views to manage data view

## Advanced query

- Save query – still supported
- Favorites and default queries (AX 2012) > Workspace tiles
- Saved view contains current query
- Possible performance degradation?



# Demo

History personalization

Manage personal saved views

**Feature management**  
Do not enable new features automatically

New: 25 | Not enabled: 523 | Scheduled: 1  
[Enable all](#) [Check for updates](#)

New | Not enabled | Scheduled | All

Feature name	Status	Enable date	Feature added	Feature state	Module
Saved views performance enhancement			10/11/2022		System administration
Saved views support for dialogs	✔	10/11/2022	4/3/2022	On by default	System administration
Saved views support for workspaces			4/3/2022		System administration
Improved legal entity support for saved views	✔	4/3/2022	10/3/2021	Mandatory	System administration
Saved view for the load planning workbench	✔	4/3/2022	1/18/2021	Mandatory	Warehouse management
Saved view for the work details page	✔	4/3/2022	1/18/2021	Mandatory	Warehouse management
Saved view for wave processing	✔	4/3/2022	1/18/2021	Mandatory	Warehouse management
Saved views for load processing	✔	4/3/2022	1/18/2021	Mandatory	Warehouse management
Saved views for purchase orders	✔	4/3/2022	1/18/2021	Mandatory	Procurement and sourcing
Saved views for shipment processing	✔	4/3/2022	1/18/2021	Mandatory	Warehouse management
Saved views for Inventory management	✔	10/3/2021	9/30/2020	Mandatory	Inventory and warehouse management
Saved views for released products	✔	1/2/2022	9/30/2020	Mandatory	Product information management
Saved views for planned orders	✔	4/3/2022	8/17/2020	Mandatory	Master planning
Saved views for production control	✔	10/3/2021	8/17/2020	Mandatory	Production control
Saved Views for Sales and Marketing	✔	4/3/2022	8/17/2020	Mandatory	Sales and marketing
Saved views	✔	10/3/2021	6/9/2019	Mandatory	System administration

**Saved views**

Feature added 6/9/2019  
System administration  
[Learn more](#)

This feature was made mandatory on 10/3/2021

**Description**

This feature enables saved views, which is a significant enhancement to the personalization subsystem. This feature allows users to have multiple named sets of personalizations per page. Views can also be published to security roles and legal entities.

**Comments**



# Demo

Manage personalization

Publish views



# Best practice for implementations

- **Create corporate views**
  - Identify most frequently used form
  - Hide content that is not required
  - Rename controls
  - Rearrange
  - Save and publish
- **Optimize per role**
- **Optimize per user/task**
  - Control what forms users can personalize

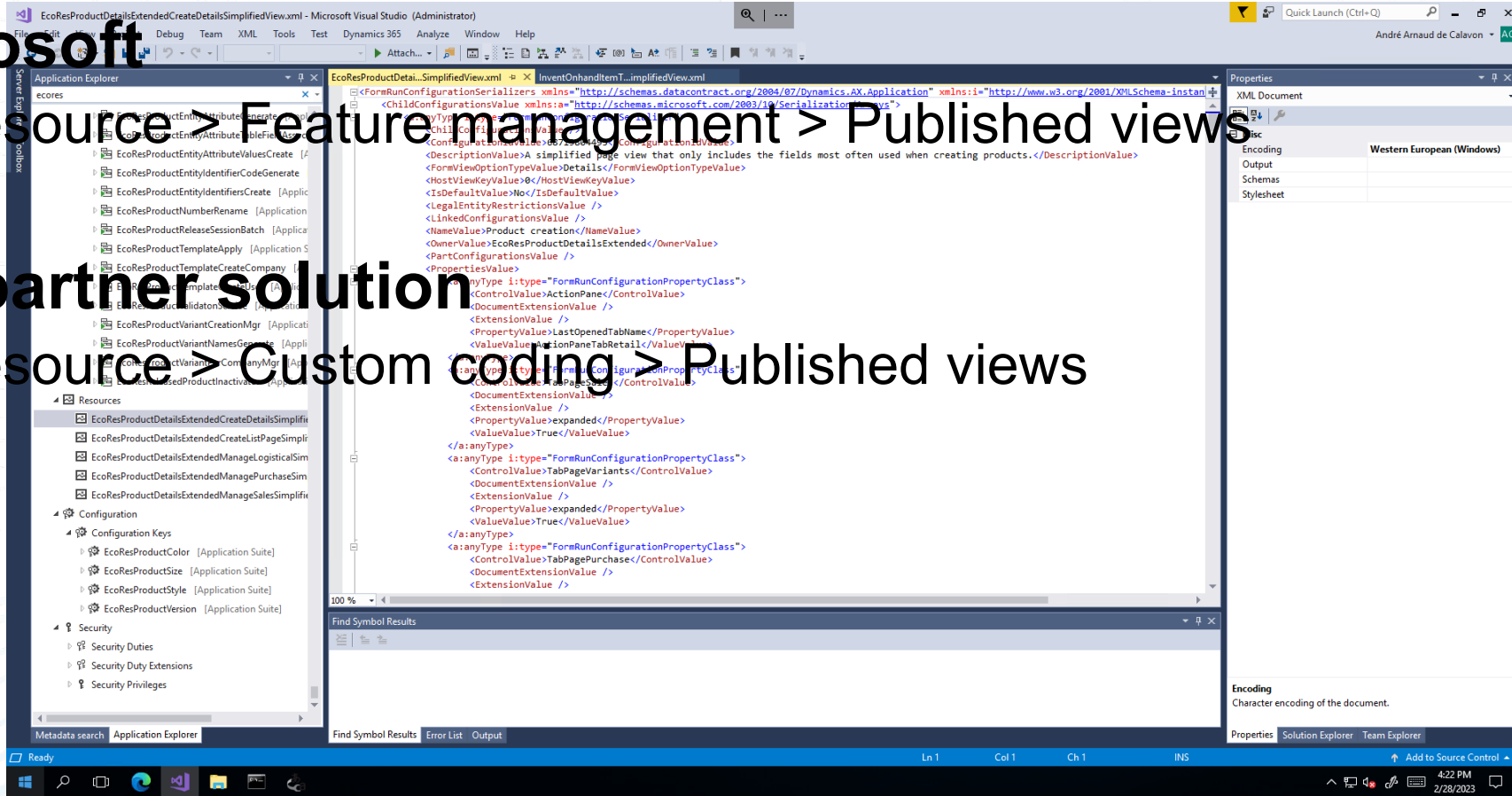
# Control from development

The screenshot displays the Microsoft Dynamics CRM development environment. On the left, the 'Design | Pattern: Dialog - Tabs' window shows a tree view with 'Tab (Tab)' and 'ButtonGroup (Button Group)'. On the right, the 'Properties' window for 'FormDesign FormDesign' is open. The 'Appearance' section is expanded, showing a table of properties. A yellow callout box points to the 'Allow User Setup' property, which is set to 'Yes'. The callout box contains the text 'Design choice: "No"'. Other properties in the 'Appearance' section include 'Caption' (@SYS5681), 'Size' (Large), 'Empty' (No), 'Delete Button' (Auto), 'New Button' (Auto), 'Action From Menu Item' (No), and 'Type' (Standard). The 'Behavior' section shows 'Default Action', 'New Record Action', and 'View Edit Mode' (Auto). The 'Data' section shows 'Allow Form Company Change' (No).

Property	Value
Allow User Setup	Yes
Caption	@SYS5681
Size	Large
Empty	No
Delete Button	Auto
New Button	Auto
Action From Menu Item	No
Type	Standard

# Tip for ISV/partner solutions

- Microsoft
  - Resource > Feature management > Published views
- ISV/partner solution
  - Resource > Custom coding > Published views





# Additional Resources

[Optimizing the Experience in Dynamics 365 Finance and SCM | December 14-15, 2022 – TechTalk](#)

[Personalize the user experience - Finance & Operations | Dynamics 365 | Microsoft Learn](#)

[Saved views - Finance & Operations | Dynamics 365 | Microsoft Learn](#)



# Additional Resources

<https://community.dynamics.com/365/dynamics-365-fasttrack/b/techtalks/posts/optimizing-the-experience-in-dynamics-365-finance-and-scm-december-14-15-2022>

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/personalize-user-experience>

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/saved-views>







# Questions?

Thanks for attending the session!