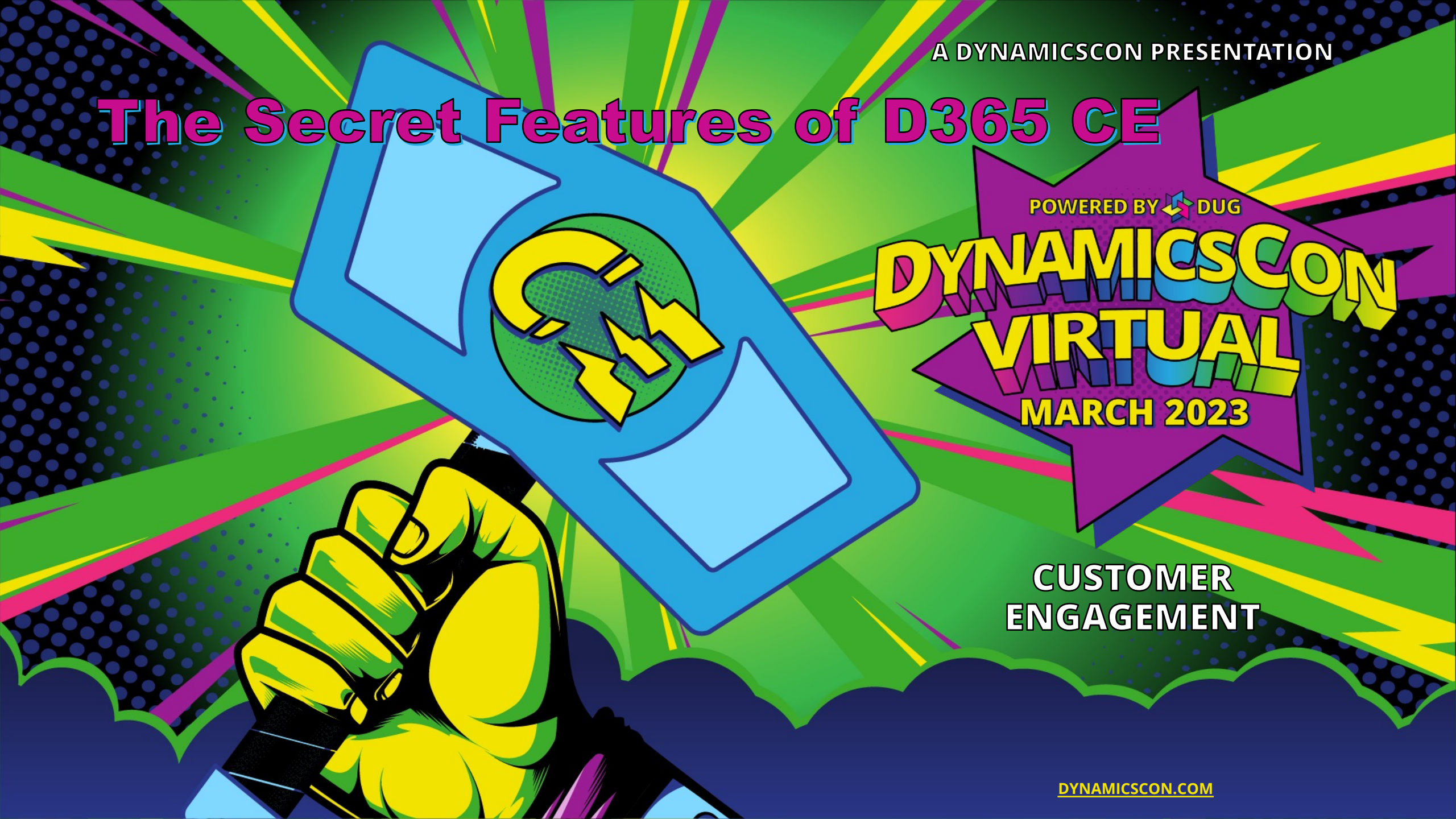
A DYNAMICSCON PRESENTATION

The Secret Features of D365 CE



CUSTOMER ENGAGEMENT

DYNAMICSCON.COM

Dian Taylor

RSM US LLP

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MARCH 2023

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AGENDA

- Customize Viva Sales Forms
- Custom status on SLA Timer
- Release Planner
- Customer Service Admin: Guided Channel Setups
- Auto-complete Control
- Ad-hoc Powerbi reports
- Power Apps read only grid control
- Modernized Case Grids
- Duplicate Lead Detection
- Form Component Control
- In-app notifications for Model Driven Apps

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Customize Viva Sales Forms

- Change forms
- Add (custom) fields
- Allow for editing in Viva Sales Forms

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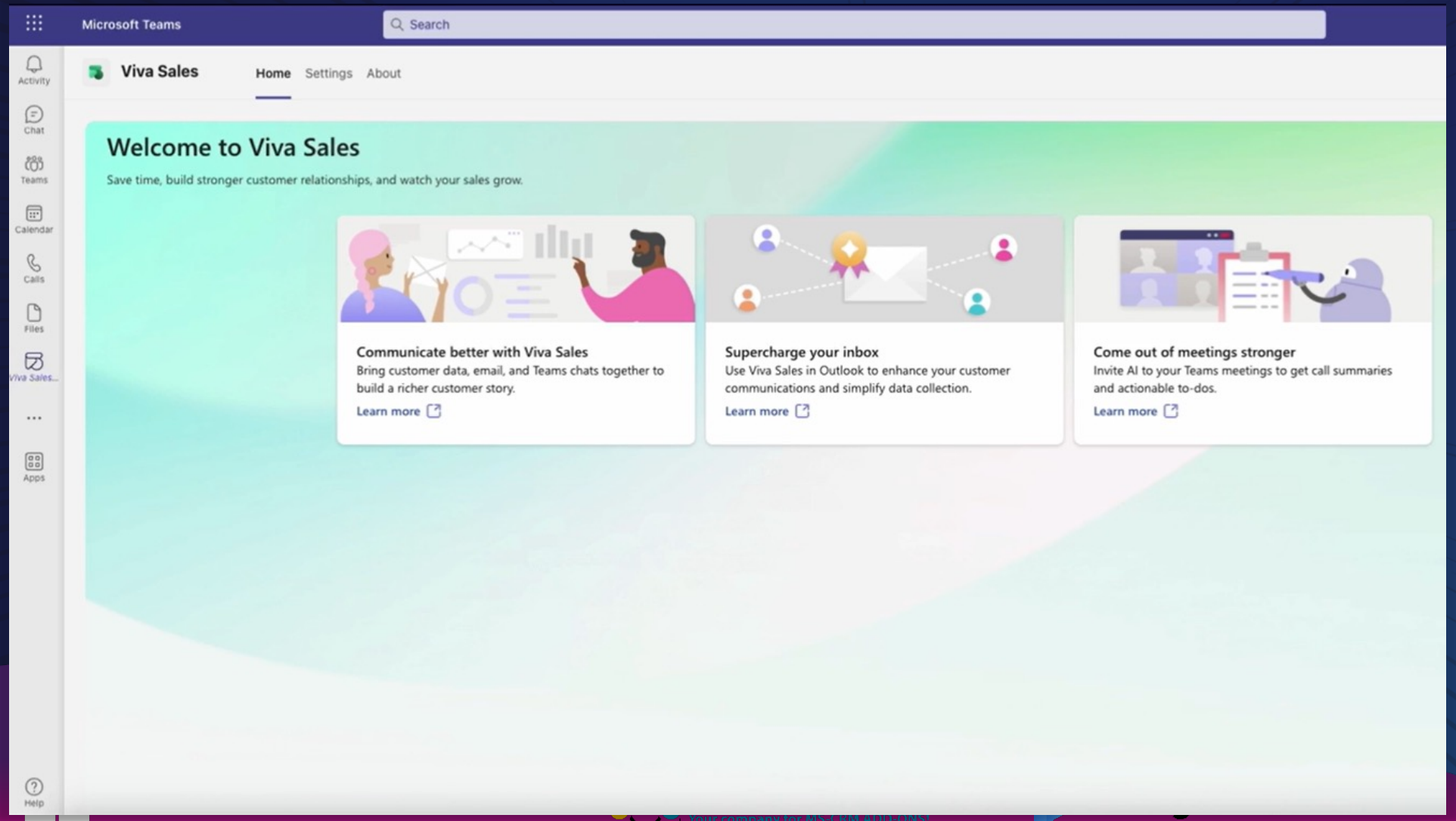
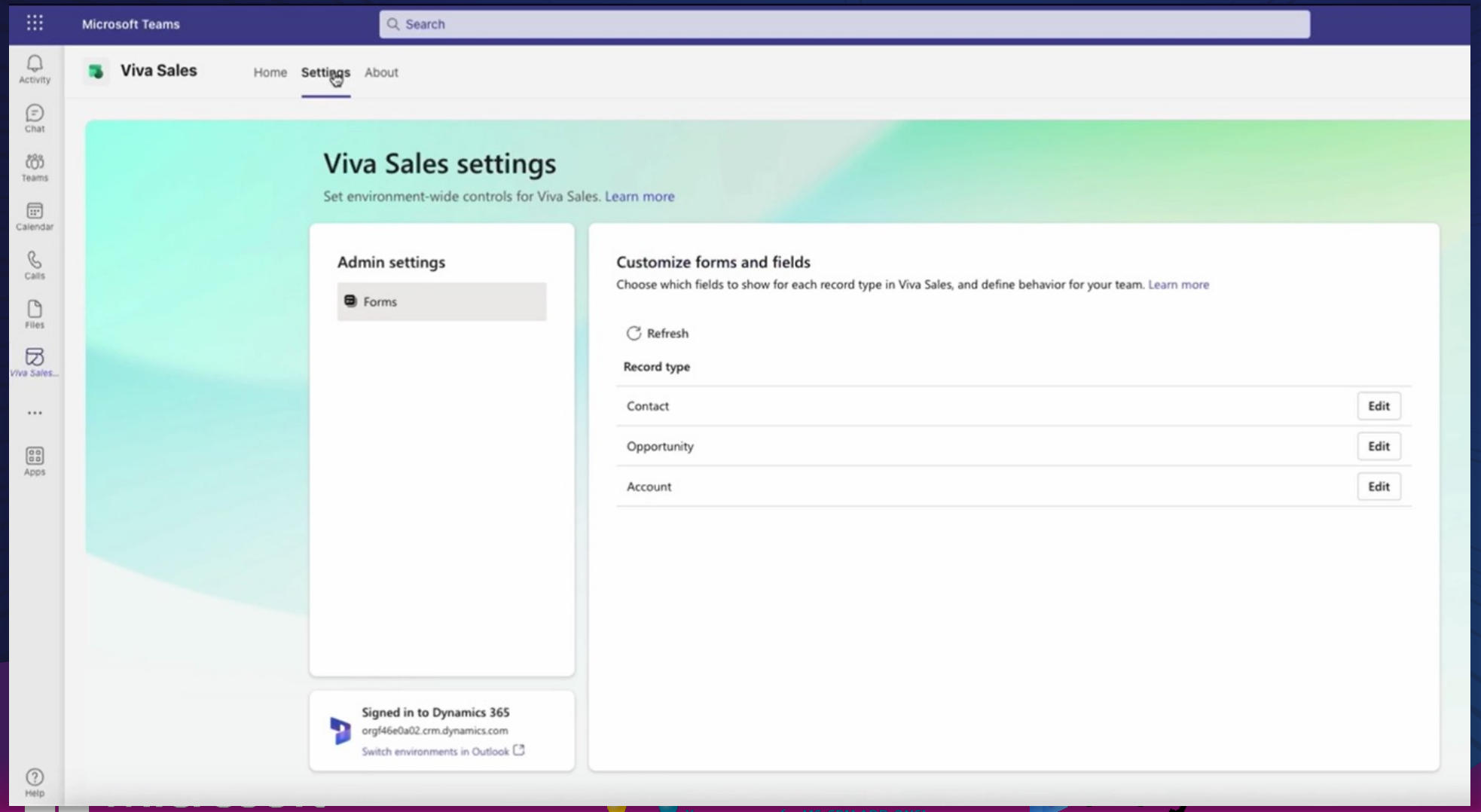
Customize Viva Sales Forms

- **Access Configuration in Teams**



Customize Viva Sales Forms

- **Configuration in Teams > settings**



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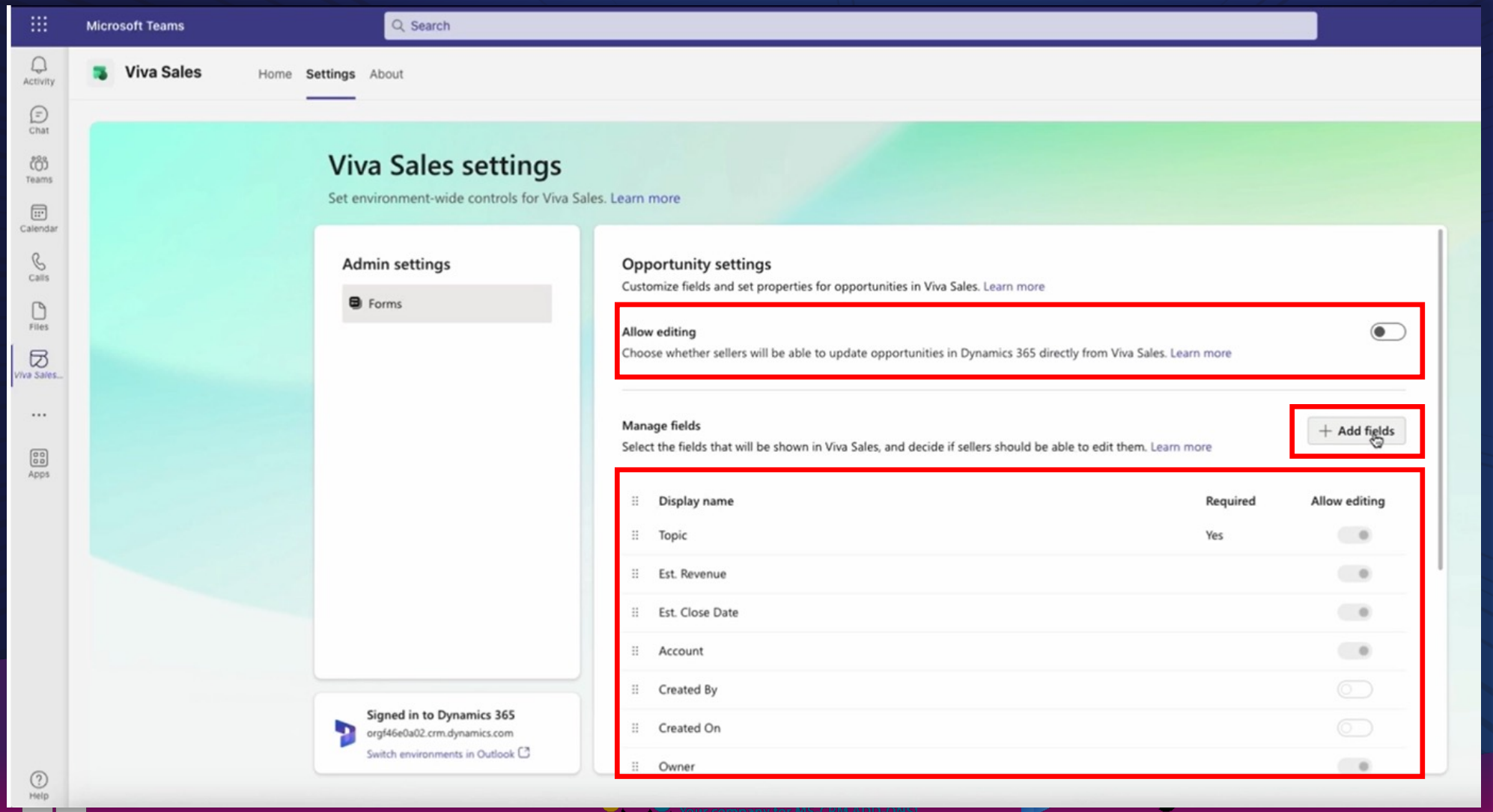
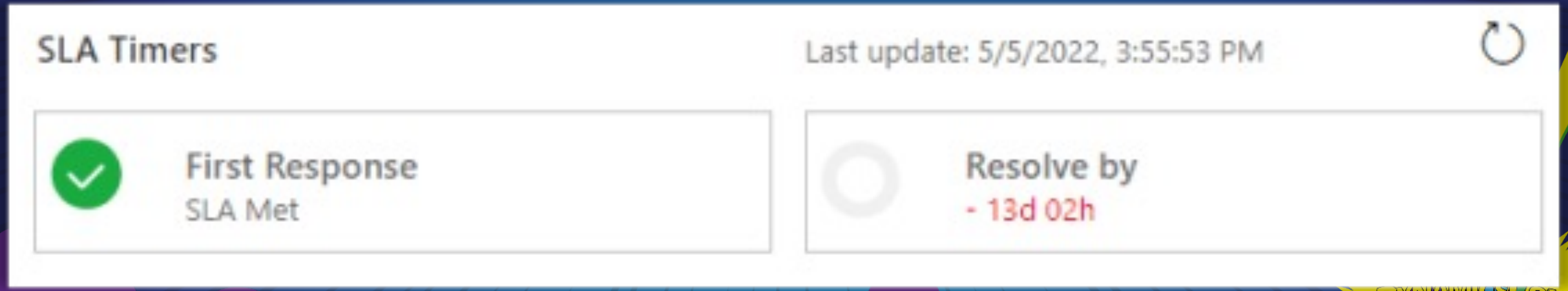
Customize Viva Sales Forms

- **Configuration in Teams > settings**



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/value of the status in the SLA KPI Instance



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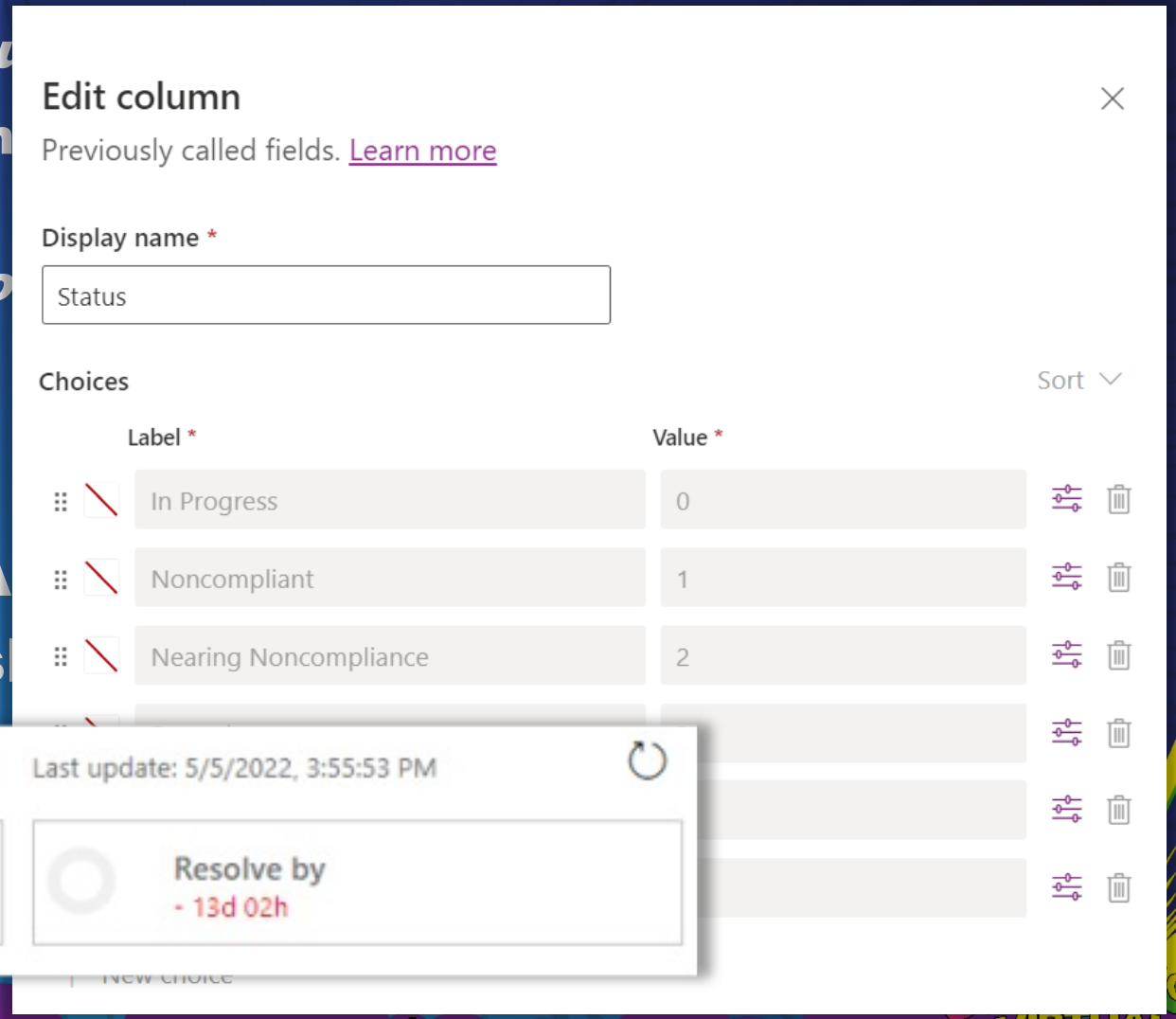
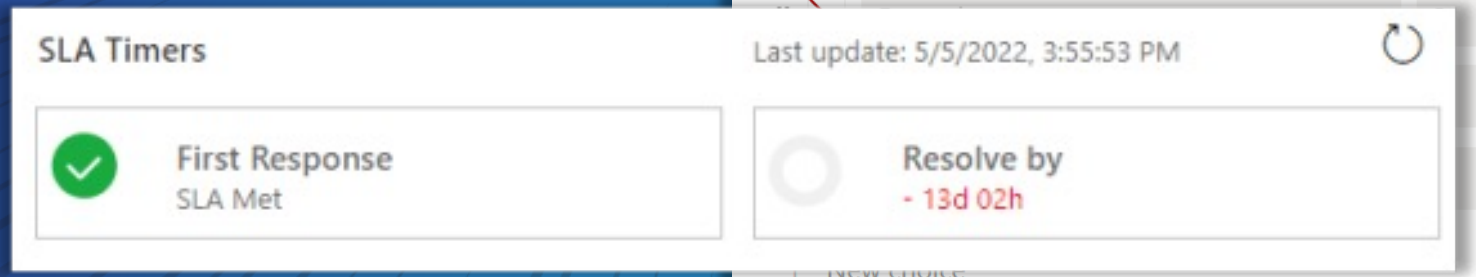
Configure custom status on SLA Timer

- ***Formula is Language code=Value:Custom Status***
- ***Language code represents the langu***
- ***Value represents the actual value (n set in the SLA KPI Instance***
- ***Custom Status represents the custo control for this status.***
- **Example: 1033=4:SLA Met**
  - **1033 = The English Language**
  - **4=Succeeded (value of SLA**
  - **SLA Met is custom status s**





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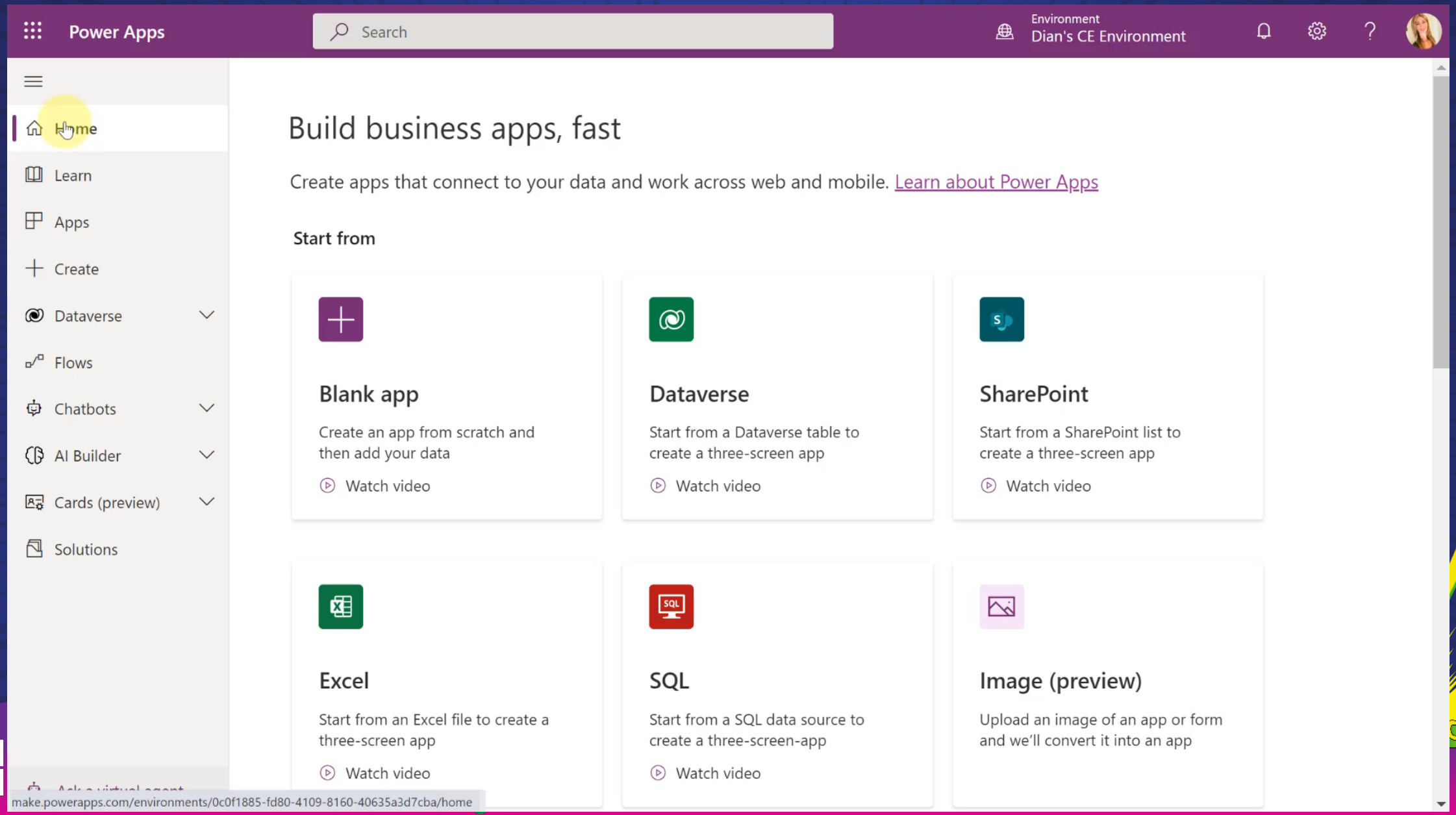
DEMO: Custom status on SLA Timer



D365 & Power Platform Release Planner

- New way to view release notes
- Portal experience
- Easier way to see what's coming, what's changed, etc.
- https://experience.dynamics.com/releaseplans/
- Download wave summary
- Share your 'personal' release plans
- Add notes

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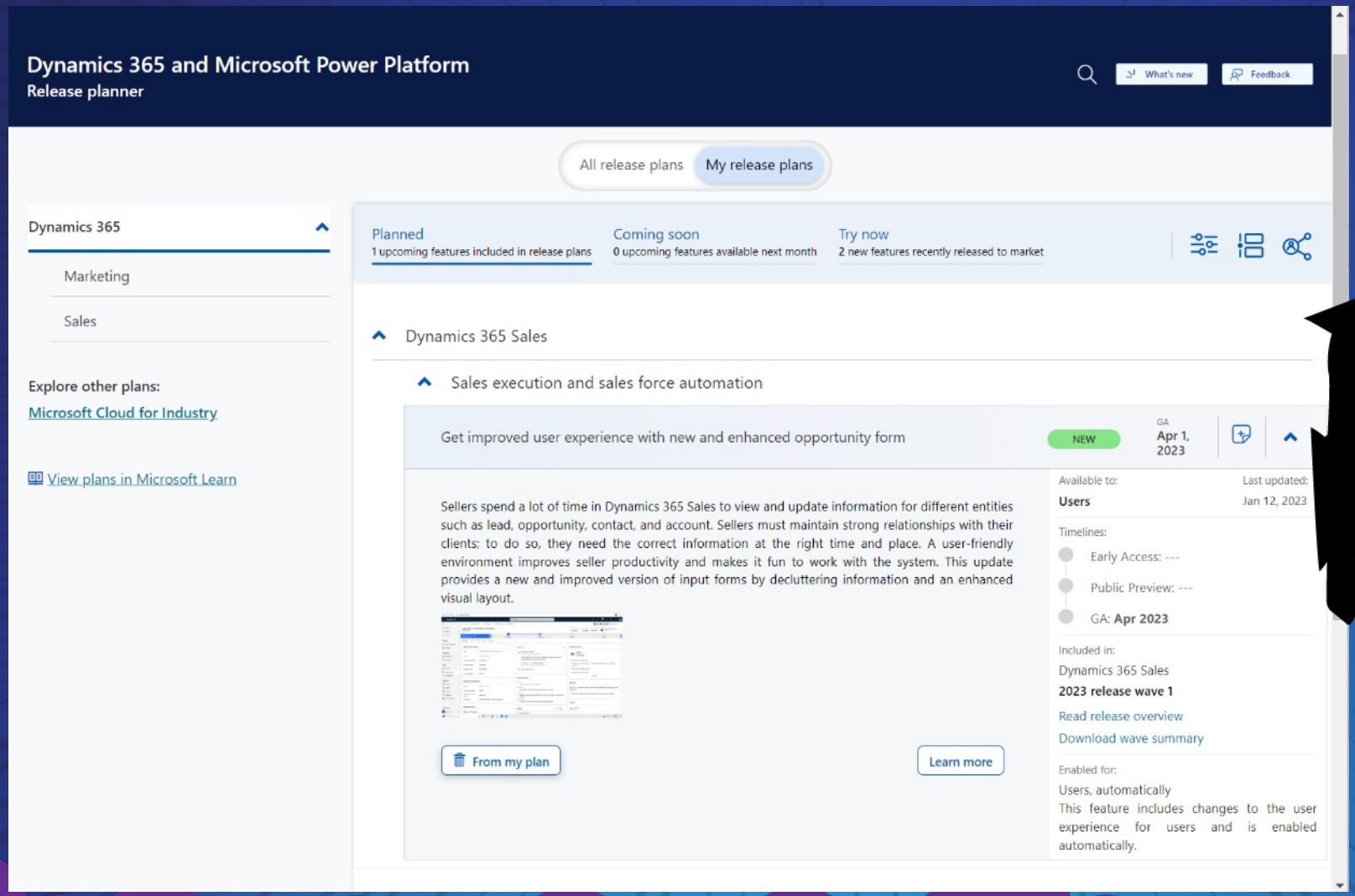
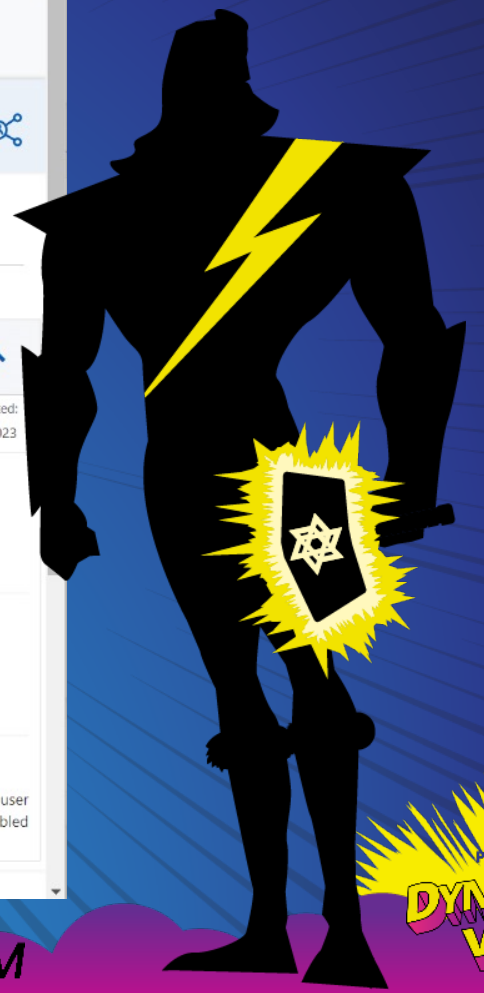
D365 & Power Platform Release Planner





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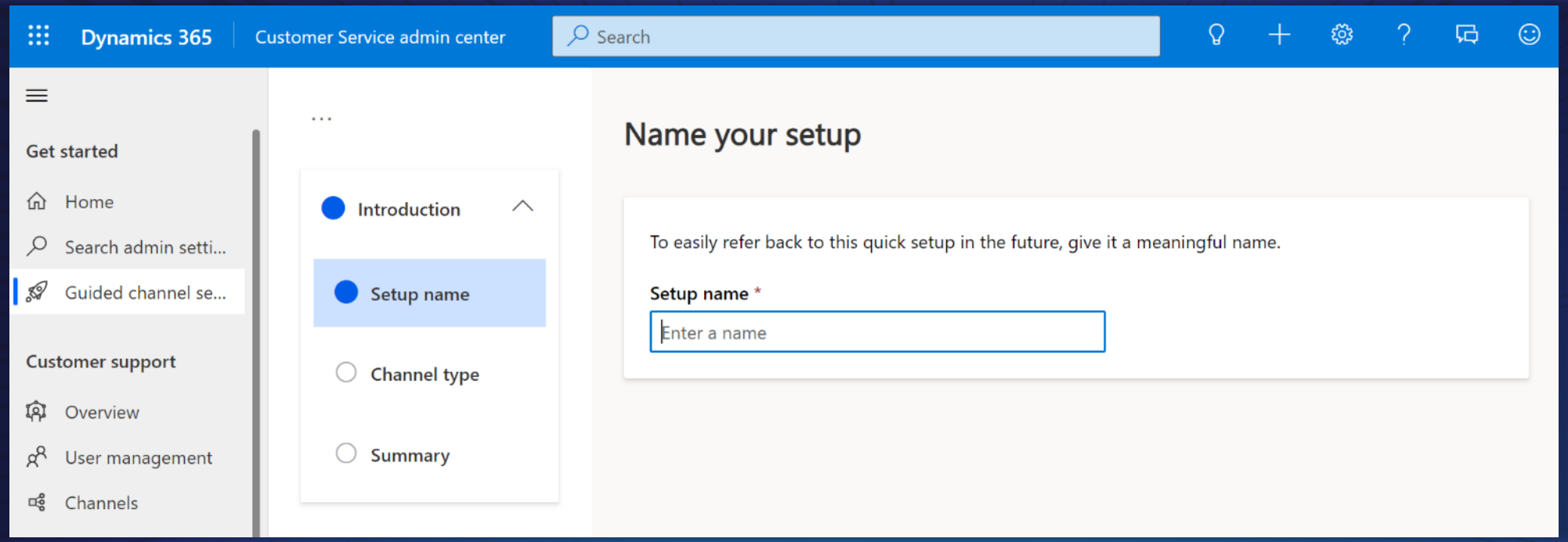
Customer Service Admin: Guided Channel Setups



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

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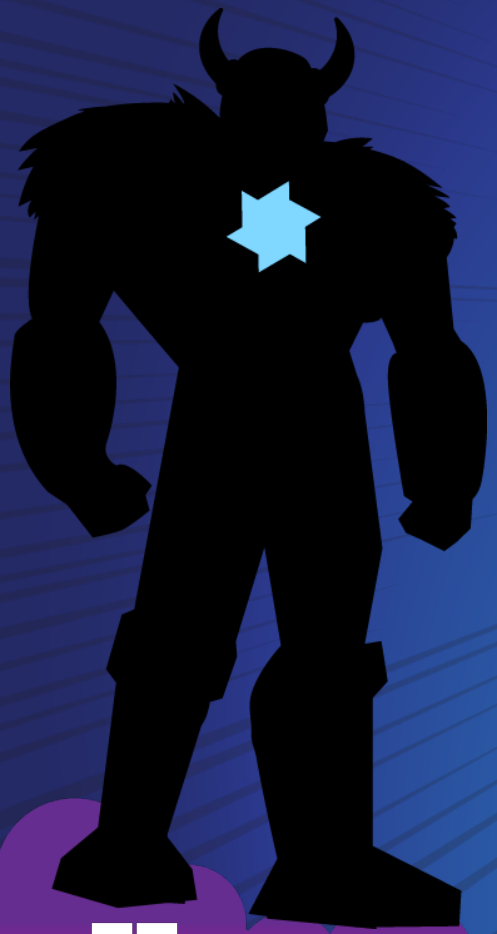

DEMO

Guided Setups

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Auto-Complete Control

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

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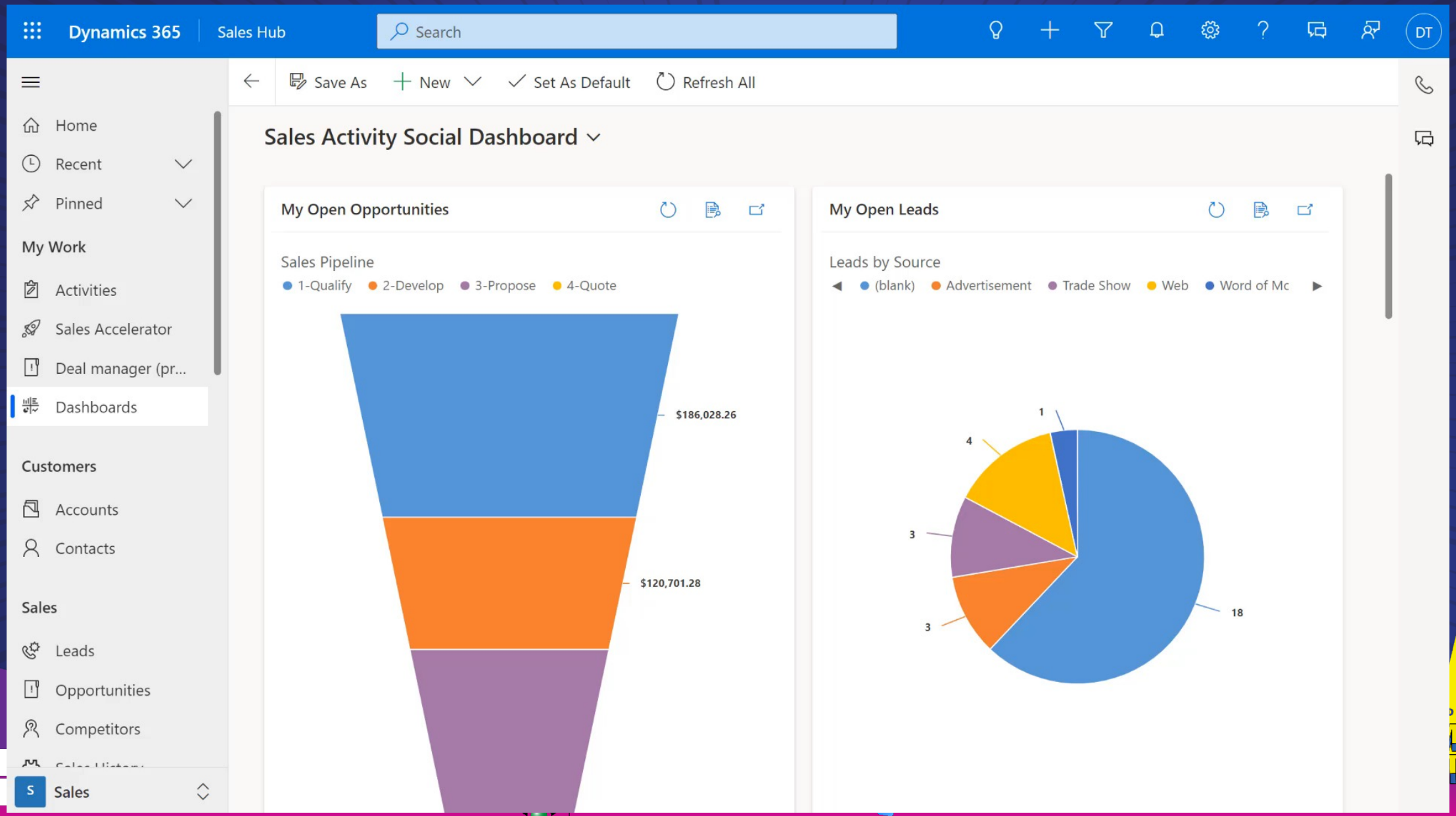
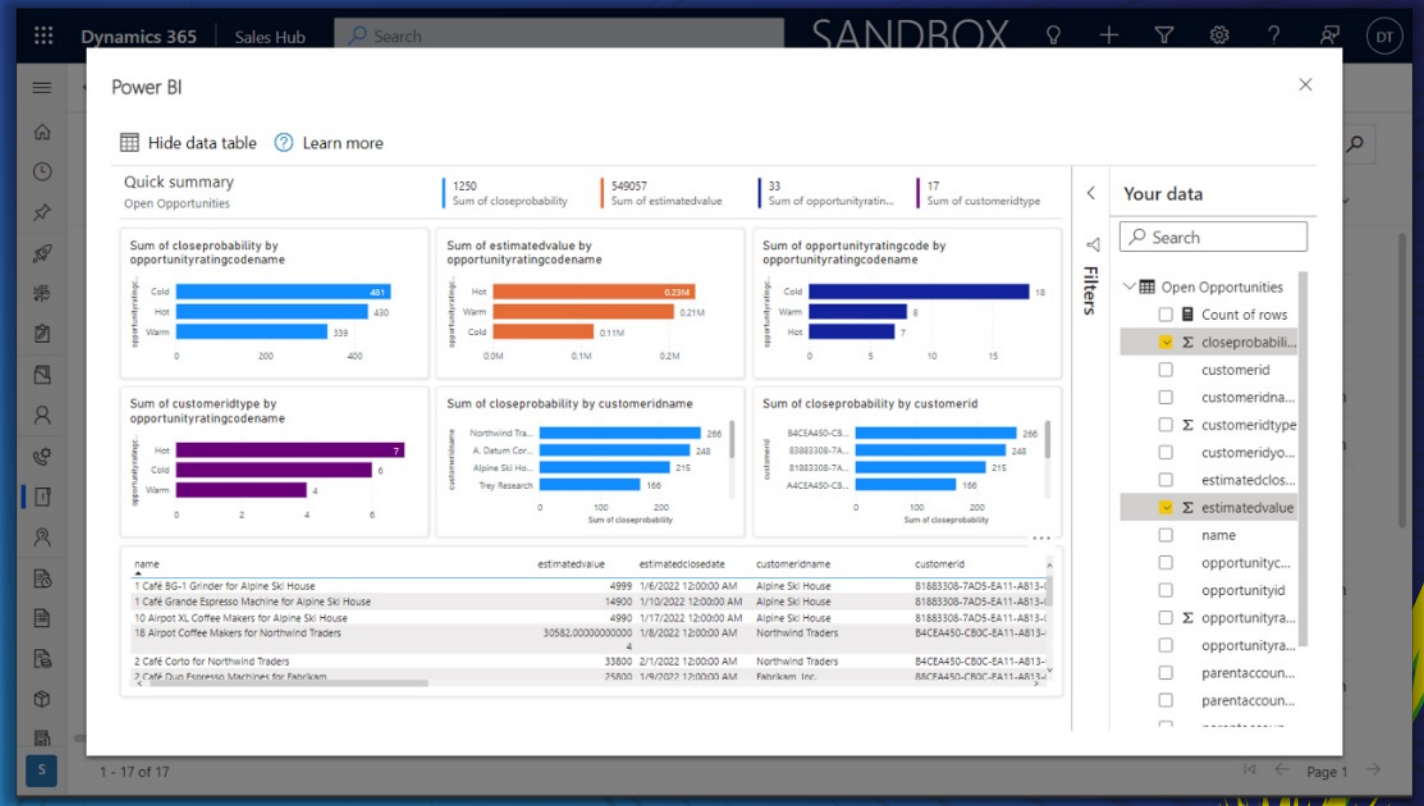
DEMO: Auto-Complete Control



Ad-hoc PowerBI Reporting in D365

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



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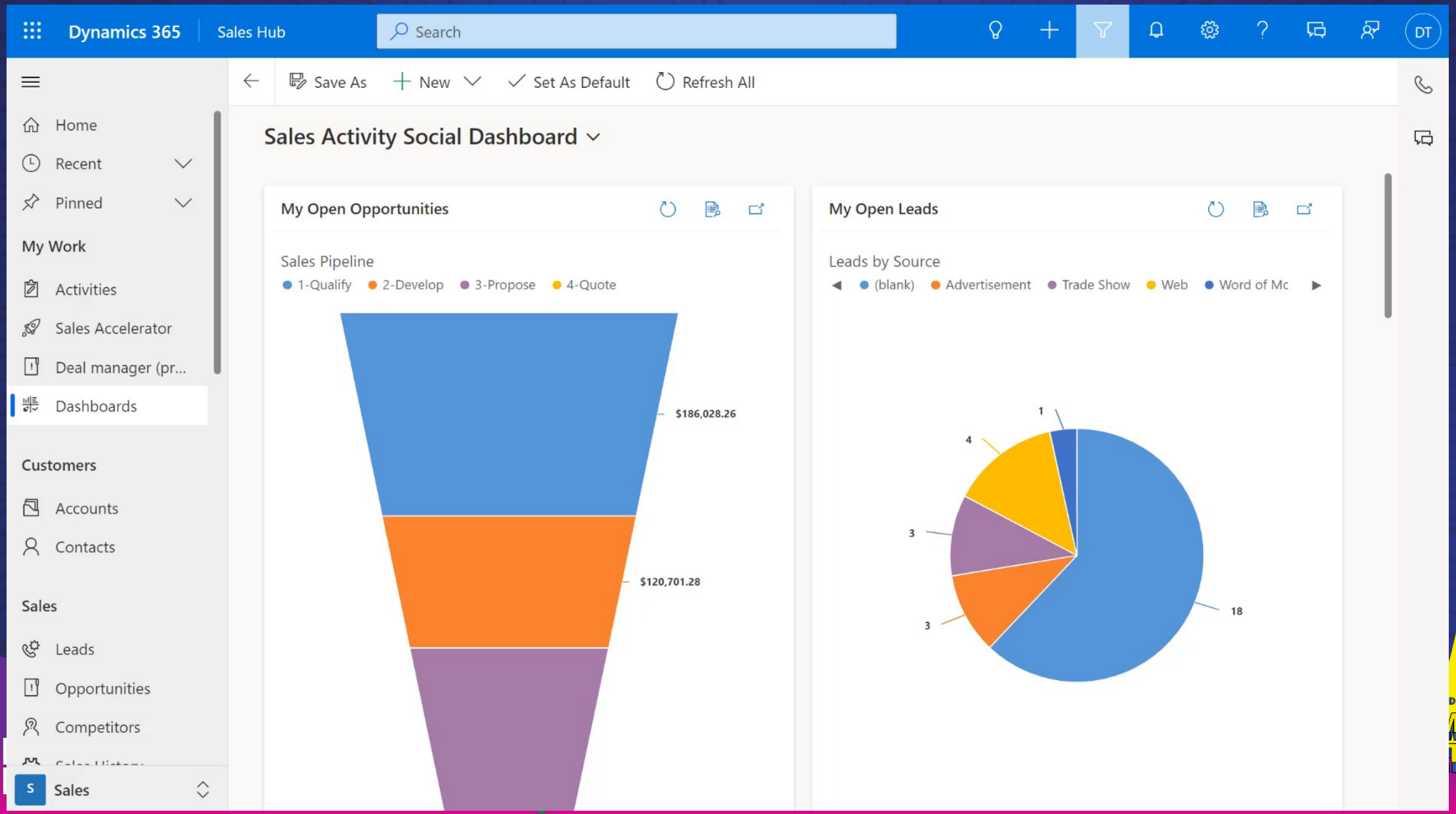
DEMO: PowerBI Reporting in D365



Modernized Case Grids

- New visualization of case grid
- Enable by adding ‘Power Apps Grid control’ to case table
- New case view ‘Enhanced Active Cases’

For Users, By Users

Microsoft

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Modernized Case Grids

- New visualization of case grid
- Enable by adding ‘Power Apps Grid control’ to case table
- New case view ‘Enhanced Active Cases’

IMPORTANT!

- NEXT SLA: Only shows the SLA KPI with the earliest expiration time
- If an SLA KPI is non compliant and another is counting down, the non compliant SLA will be shown
- Seems to break grid filtering when drilling down chart

For Users, By Users

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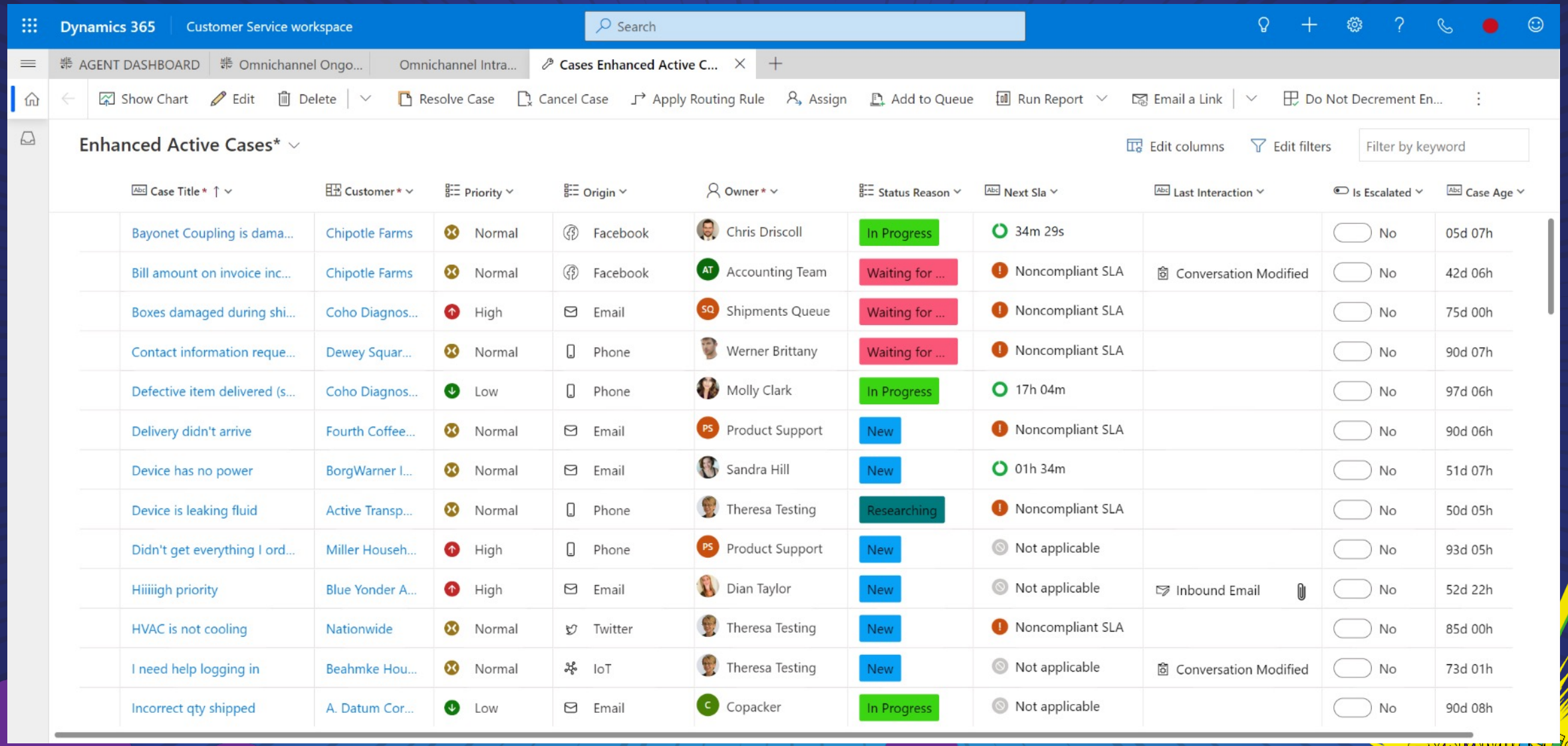
Modernized Case Grids



Case Title *	Customer *	Priority	Origin	Owner *	Status Reason	Next Sla	Last Interaction	Is Escalated	Case Age
Bayonet Coupling is dama...	Chipotle Farms	Normal	Facebook	Chris Driscoll	In Progress	34m 29s		No	05d 07h
Bill amount on invoice inc...	Chipotle Farms	Normal	Facebook	Accounting Team	Waiting for ...	Noncompliant SLA	Conversation Modified	No	42d 06h
Boxes damaged during shi...	Coho Diagnos...	High	Email	Shipments Queue	Waiting for ...	Noncompliant SLA		No	75d 00h
Contact information reque...	Dewey Squar...	Normal	Phone	Werner Brittany	Waiting for ...	Noncompliant SLA		No	90d 07h
Defective item delivered (s...	Coho Diagnos...	Low	Phone	Molly Clark	In Progress	17h 04m		No	97d 06h
Delivery didn't arrive	Fourth Coffee...	Normal	Email	Product Support	New	Noncompliant SLA		No	90d 06h
Device has no power	BorgWarner I...	Normal	Email	Sandra Hill	New	01h 34m		No	51d 07h
Device is leaking fluid	Active Transp...	Normal	Phone	Theresa Testing	Researching	Noncompliant SLA		No	50d 05h
Didn't get everything I ord...	Miller Househ...	High	Phone	Product Support	New	Not applicable		No	93d 05h
Hiiiiigh priority	Blue Yonder A...	High	Email	Dian Taylor	New	Not applicable	Inbound Email	No	52d 22h
HVAC is not cooling	Nationwide	Normal	Twitter	Theresa Testing	New	Noncompliant SLA		No	85d 00h
I need help logging in	Beahmke Hou...	Normal	IoT	Theresa Testing	New	Not applicable	Conversation Modified	No	73d 01h
Incorrect qty shipped	A. Datum Cor...	Low	Email	Copacker	In Progress	Not applicable		No	90d 08h

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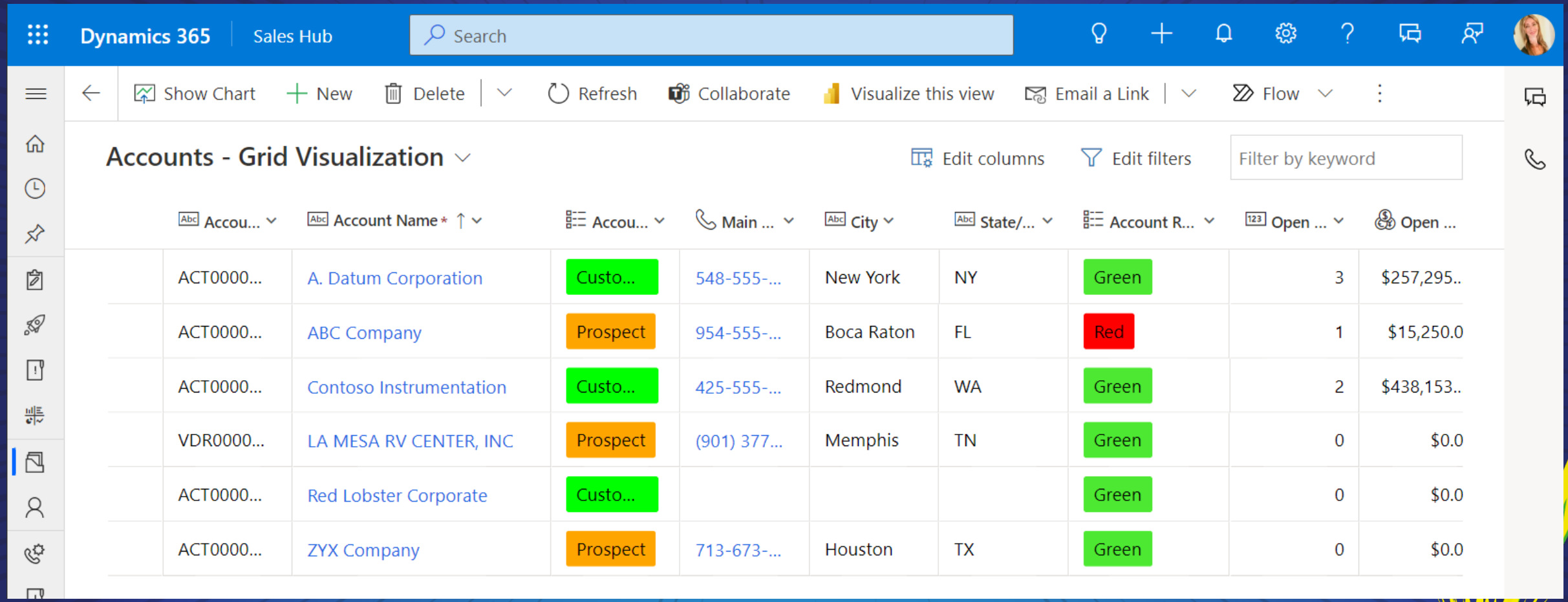
Using the Control on a Different Table!



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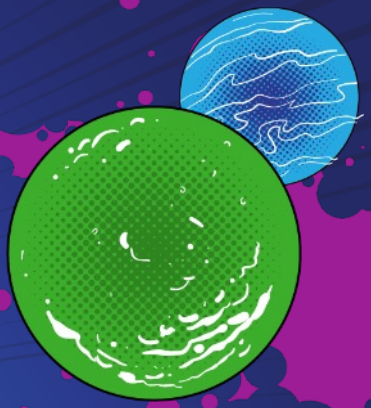
Modernized Case Grid



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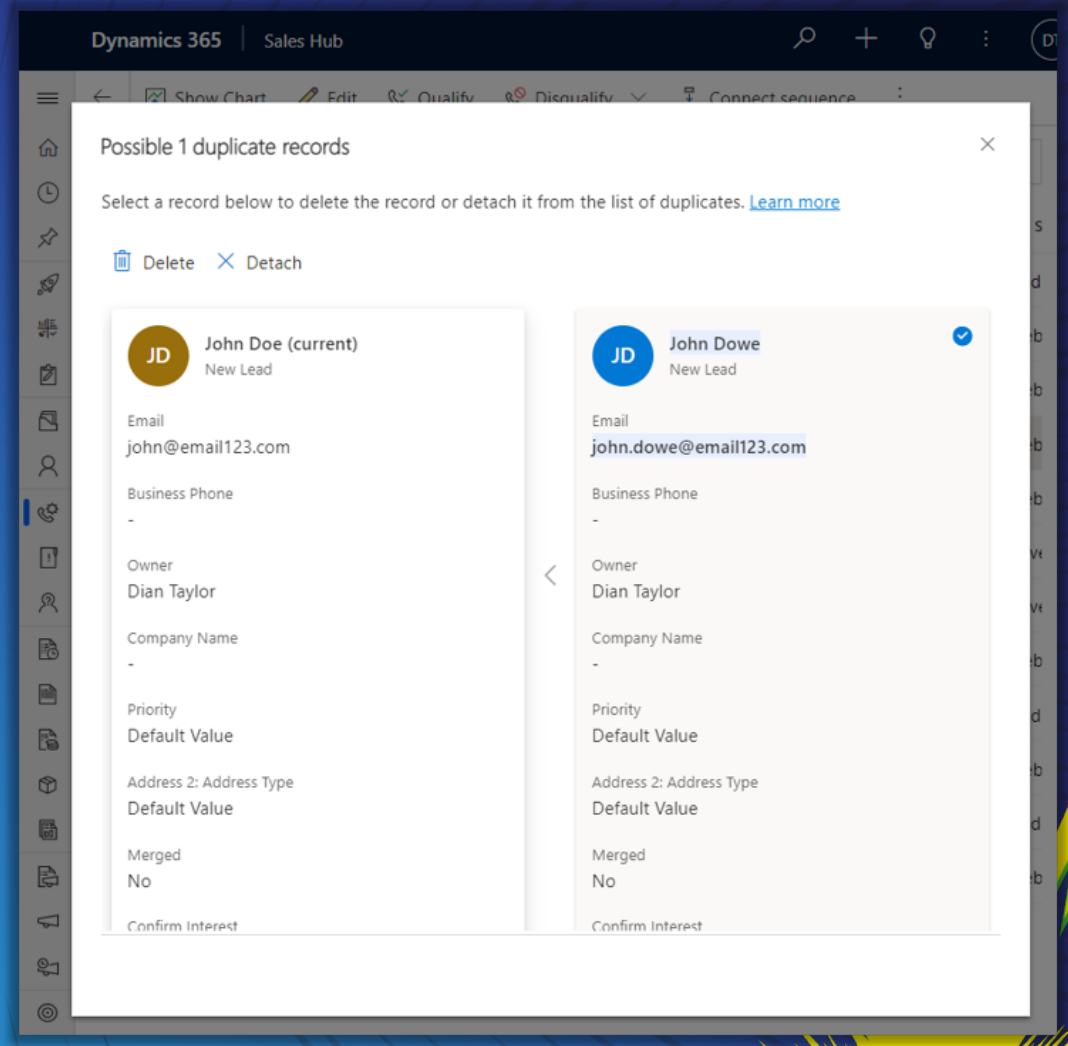
Duplicate detection for Leads(preview)

- 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

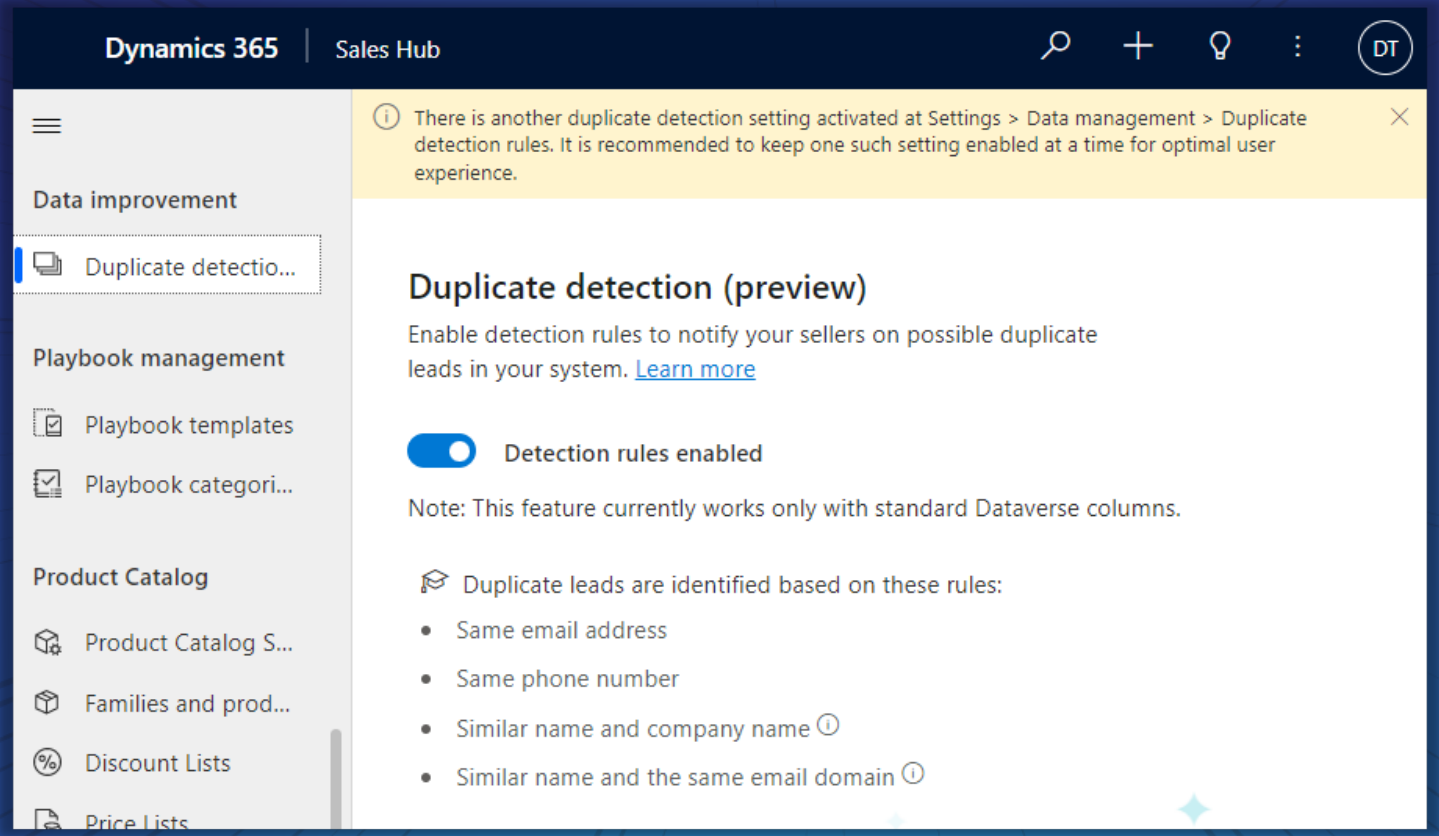


Duplicate detection for Leads(preview)

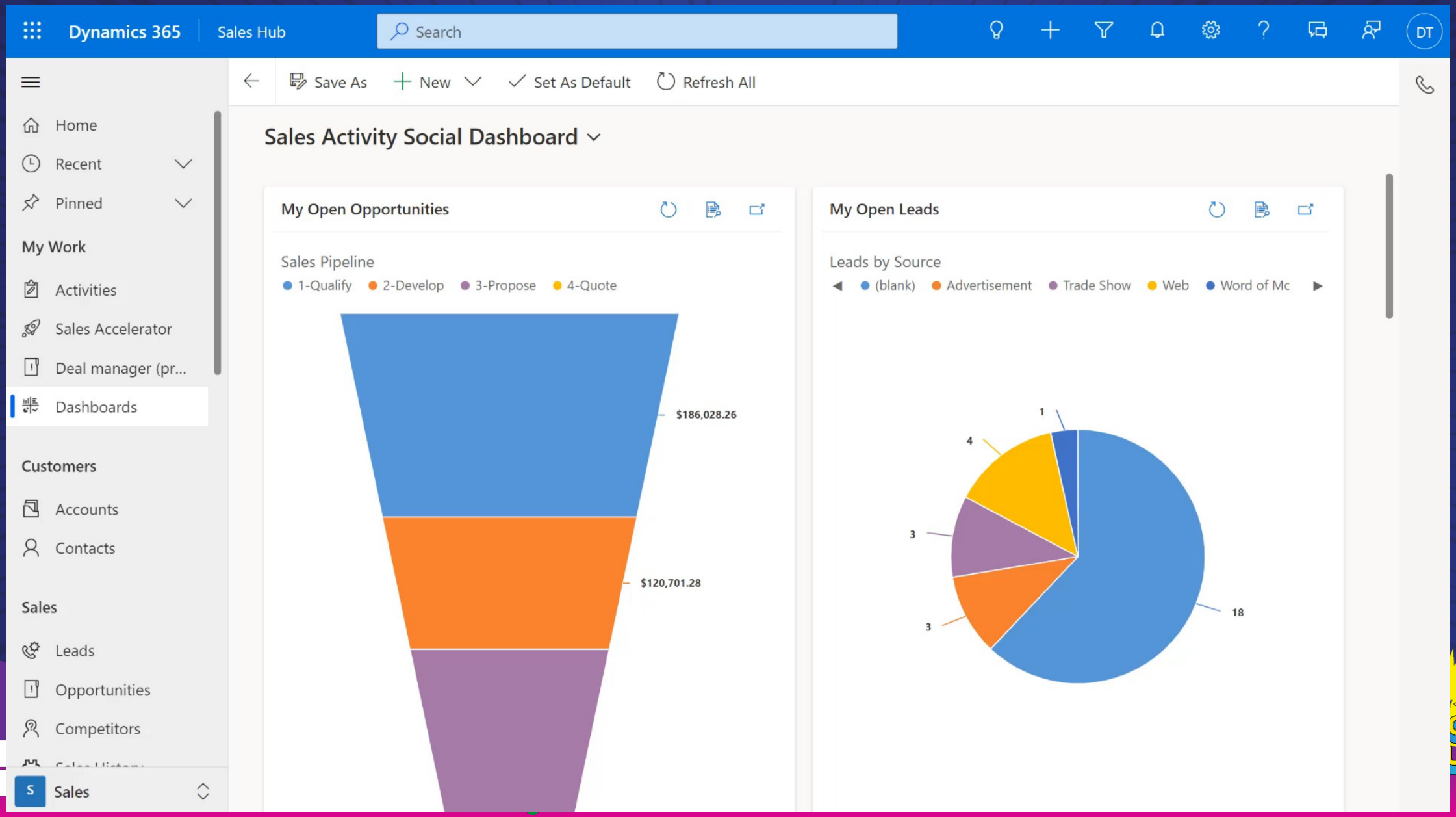
- Logic rules:
  - Same email address
  - Same phone number
  - Similar lead name and company name:
    - Merphy / Murphy
  - Similar lead name and email domain:
    - jmerphy@abc.com / jmurphy@abc.com

Duplicate detection for Leads(preview)

- **Needs to be enabled**

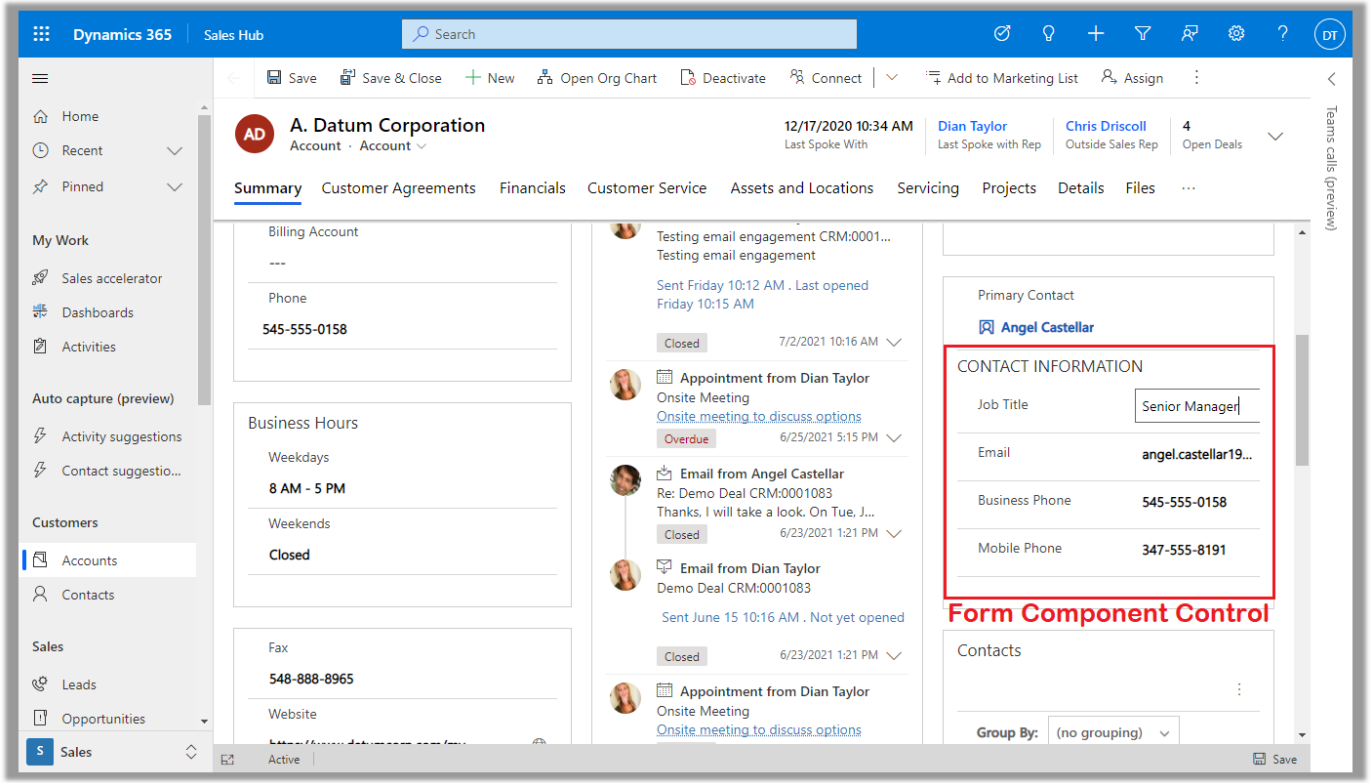


Duplicate detection for Leads(preview)



Form Component Control

- Embed forms within forms
- Not a quick view form
- Data in the form is editable!
- Based on lookup – 1:N
- Must be a main form
- Add the embedded form to the model driven app



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Form Component Control

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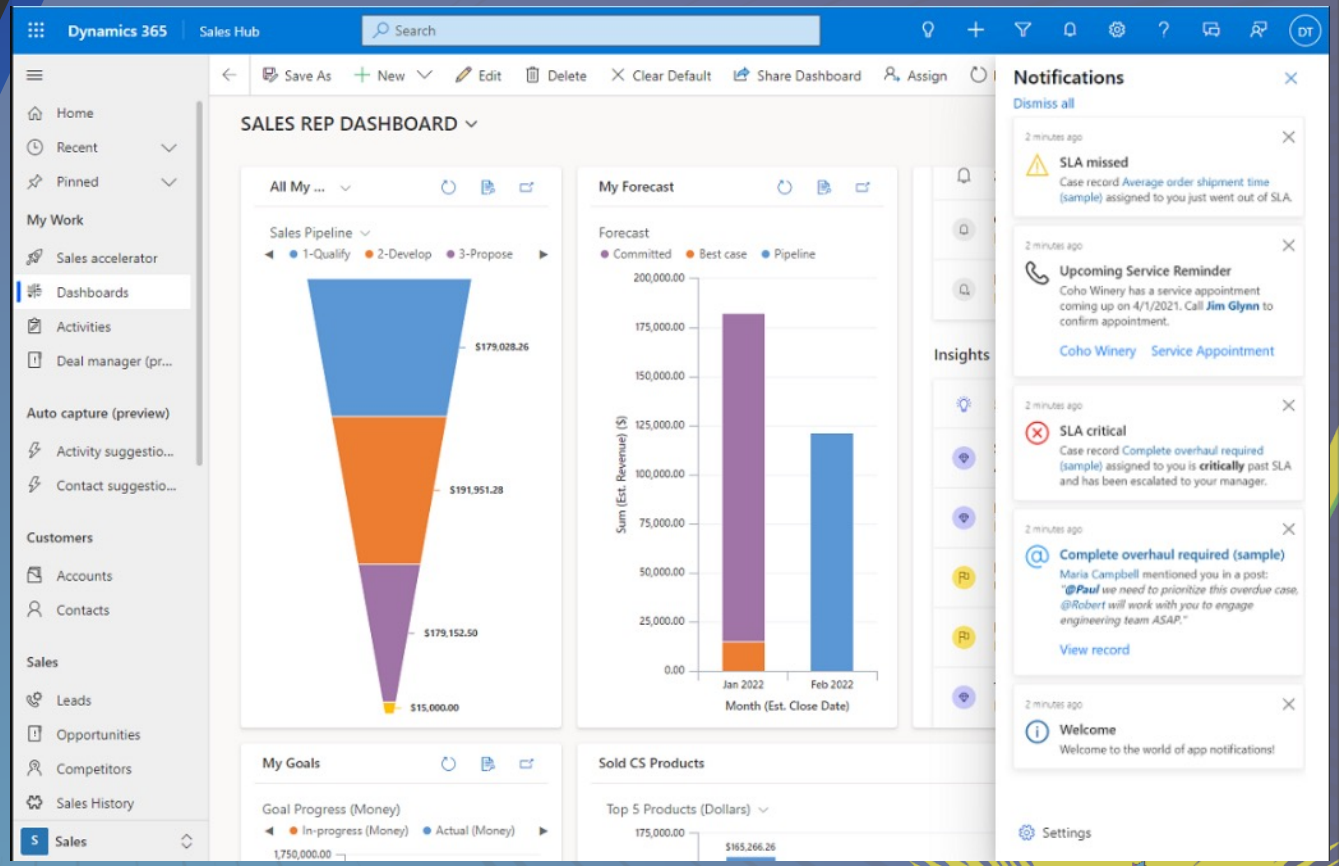
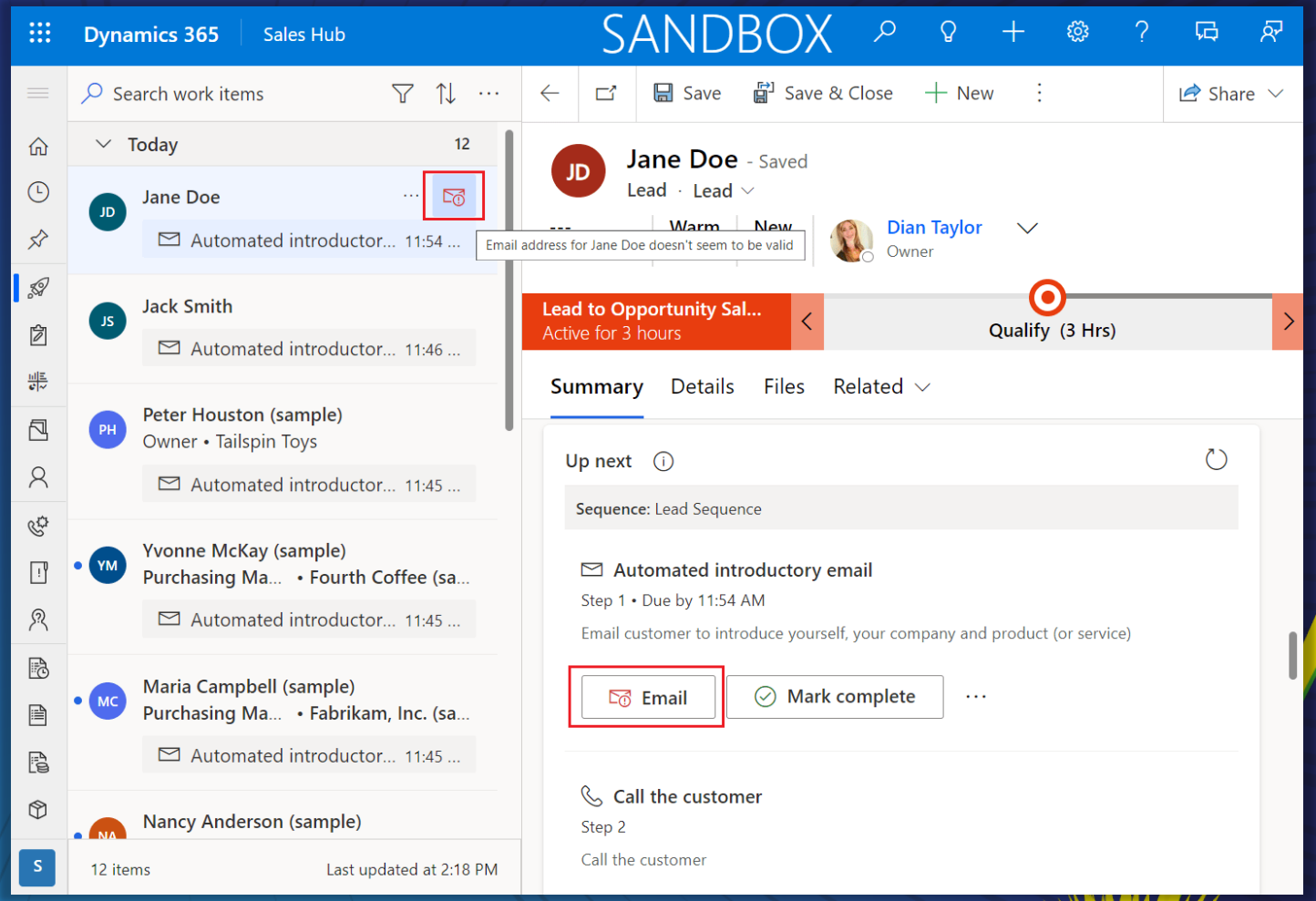
In-App Notifications

- **Different from push notifications**
- **Created by Power Automate Flow**
- **Use XRM Toolbox to create them easily *(Check out my article and video on this topic!)***



Email Validation (preview)

- System reviews email addresses
- Leads only
- Invalid email addresses show visual warning



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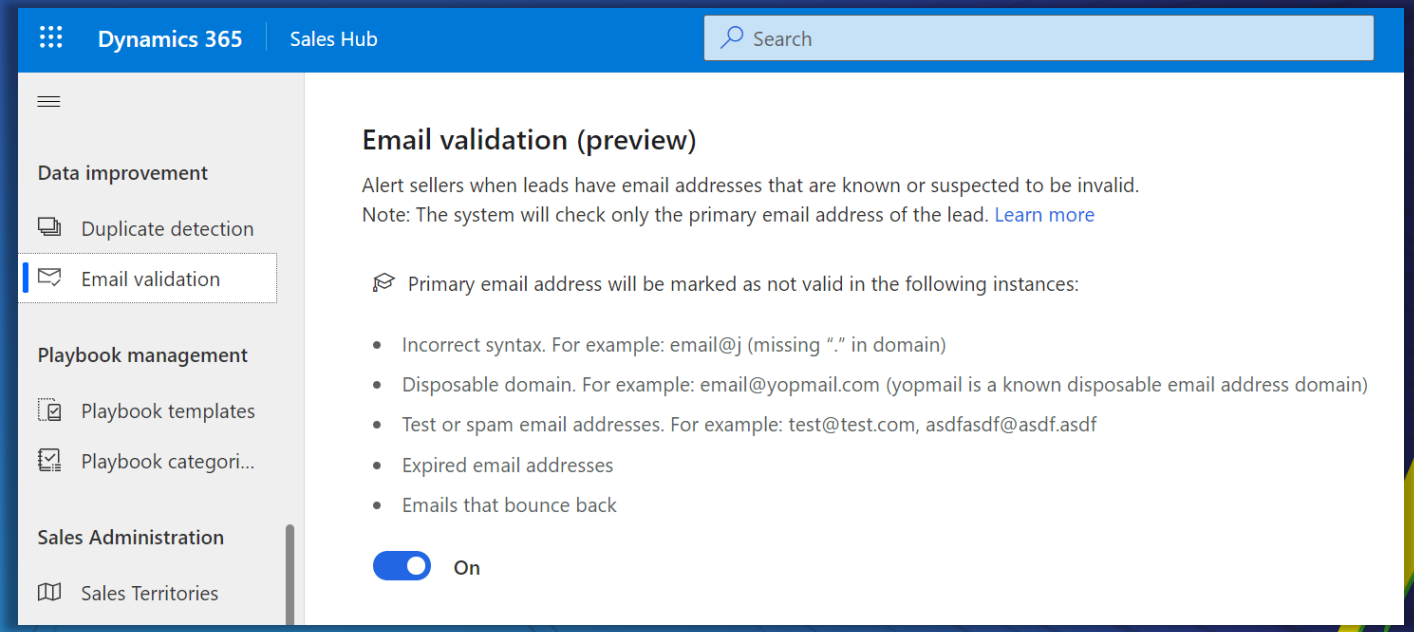
Email Validation (preview)

- Needs to be turned on
- When turned on, validation starts
  - Active leads less than 180 old
    - Created or edited
- Not available in custom apps



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THANK YOU!!!!