

WELCOME

Dynamics Customer Engagement 2022 & Beyond

Updates, Roadmap, Tips & Tricks

ENGAGEMENT

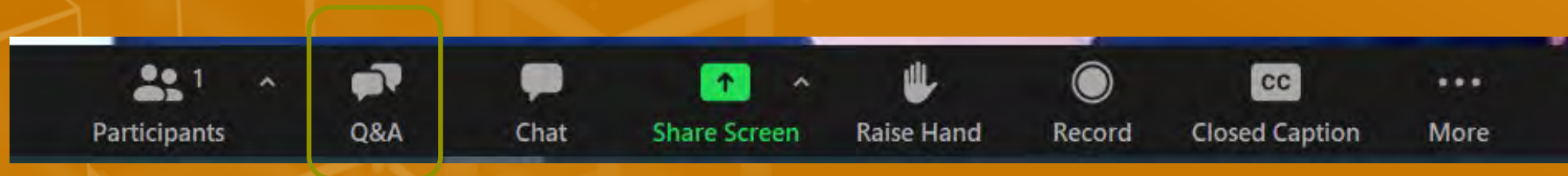
Zoom Webinar Tips

- **Ask Questions in Q&A Box**

- Click the **Q&A button** to open the window
- Type your response in the text field
- Click Send

- **Chat**

- Click the Chat button to open the chat panel
- Type your message in the Text box at the bottom of the panel
- Press Enter to send your message



INTRODUCTION

Today's Presenters

Honorable mention: Brian Mullinax



Alex Fredrickson

Solution Architect, Power Platform

Alex.Fredrickson@Armaninollp.com



Hailey Black

Functional Consultant, D365

Hailey.Black@Armaninollp.com



Matt Carriere

Customer Engagement, D365

Matt.Carriere@Armaninollp.com

OBJECTIVE

Today's Topics

Streamline Your Business With A Cloud-Based Solution



**Latest updates with
D365 Customer
Engagement**



**D365 Customer
Engagement
Roadmap**



**Tips & Tricks for
D365 Customer
Engagement**



**Don't Stress, Let
Armanino Be
Your CE Admin**



RELEASE 2022.2

Latest Feature Highlights



FEATURE HIGHLIGHTS

Expanding Grid Control Support

A. Datum Corporation (sample) - Saved

Account · Account ▾

\$10,000.00 Annual Revenue 6,200 Number of Employees

Summary **Contacts** Details Assets and Locations Servicing Files Related ▾

Group By: Company Name ▾

✓ Full Name ▾ | Email ▾ | Company Name ↑ ▾ | Business Phone ▾

A. Datum Corporation (sample)							
✓✓ Rene Valdes (sample)		someone_i@example.com		A. Datum Corporation (sample)		555-0108	
✓ Topic ▾	Potential Customer ▾	Est. Close Date ↑ ▾	Est. Revenue ▾	Account ▾	Probability ▾	Rating ▾	Total Amount ▾
6 orders of Product SKU JJ202 (sample)	A. Datum Corporati...	3/6/2022	\$10,000.00	A. Datum Co...	90	Hot	\$50.00
They sell many of the same items that we ...	A. Datum Corporati...	7/9/2022	\$26,000.00	A. Datum Co...	95	Hot	\$170.00

FEATURE HIGHLIGHTS

Form Component Enhancements



BY

Blue Yonder Airlines (sample) - Saved

Account · Account

\$10,000.00

Annual Revenue

2,900

Number of Employees

JB

James Bond

Owner

Summary

Details

Assets and Locations

Servicing

Files

Related

ACCOUNT INFORMATION

Account Name

* Blue Yonder Airlines (sample)

Phone

555-0154

Fax

Website

http://www.blueyonderairlines.com/

Parent Account

Ticker Symbol

ADDRESS

Service Address

9068 Muir Road
Los Angeles KA 20593
U.S.

Timeline

Search timeline

Enter a note...

Auto-post: 2/4/2022, 7:19 PM

Opportunity Needs to restock their s... created by James Bond for Account Blue Yonder Airli...

Auto-post: 2/4/2022, 7:18 PM

Account Blue Yonder Airlines (sample) created by James Bond

Assistant

No notifications or suggestions

Check back later to see what's new and stay up to date.

CONTACT INFORMATION

First Name

* Sidney

Last Name

* Higa (sample)

Job Title

Owner

Email

someone_e@exa...

Business Phone

555-0104

Mobile Phone

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FEATURE HIGHLIGHTS

Teams Chat (Preview)



←

+ New

Delete

Refresh

Collaborate

Email a Link

Flow

Run Report

Active Accounts

Edit columns

Edit filters

	Account Name ↑	Main Phone	Address 1: City	Primary Contact	Email (Primary Contact)
	A Datum Corporation	425-555-0182	Redmond		
	A Datum Integration	512-555-0163	Austin		
	A. Datum Corporation - Redmond	555-0158	Redmond	Adam Foster	adam.foster@contoso...
	Abbott-Schulist	+1-267-861...	Philadelphia	Paul Abbott	
	ACCE Institute		San Diego	Steve Chapman	
	Ace Hardware Corporation	425-555-6656			
	Ace Hardware Minneapolis	737-334-5565	Minneapolis	Charles Thompson	charles.thompson@mi...
	Adams, Wisoky and Gottlieb	820-791-1594	Altkirch		

Teams chats (preview)

Chat

Chats connected to records

Aubrey Rocks Inc. - Enterprise Cu... 4/25

Project • Aubrey Rocks Inc. - Enterprise Cust...

You: Please help me out

Other chats

Greenmark - West Seattle Bridge ... 9/21

You: Need help engineering the scope for this.

Profit-focused tertiary Electro-Hy... 9/16

You: Where are we with those bids

JP

Jack Peterson 9/2

Alpine 115 - New Development 6/22

You: Ron, I need help quoting this one

Greenmark Equipment - 400 Seat... 6/22

You: Hey Ron, we really need to get this thing...

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FEATURE HIGHLIGHTS

Client Toasts within the Toast Stack



FEATURE HIGHLIGHTS

Lead Duplication Improvements



FEATURE HIGHLIGHTS

Customer Service Admin Center



Welcome to the Customer Service admin center



Quick setups (preview)

Follow our step-by-step guide to set up your customer service channels.

[Get started](#)

Advanced configuration

Set up more customer service features to improve productivity for your agents.



Set up macros

Enable agents to perform repetitive tasks efficiently in a fast and process-compliant manner.

[View](#)


Set up email templates

Create consistent, preformatted email messages that agents can use to communicate with customers.

[View](#)


Set up service-level agreements

Define the level of service or support that your organization agrees to offer to a customer.

[View](#)


Set up article templates

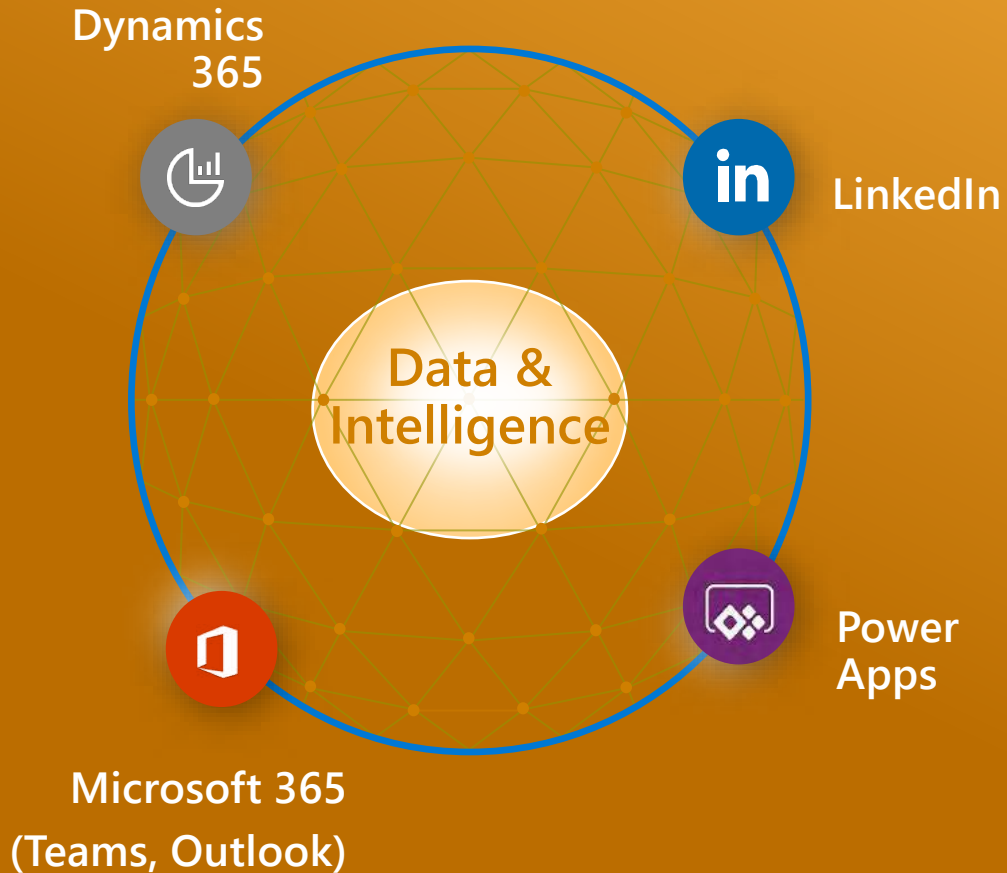
Simplify the process of creating knowledge articles and maintain consistency in branding and structure.

[View](#)



ROADMAP

Microsoft's vision for CE apps



FULL CIRCLE

Enhancing the Customer Experience

Improve the customer experience by leveraging a complete data platform to aggregate customer information

Enable employees to achieve more by delivering data-driven insights derived from all available customer data.



ROADMAP

Sales

Collaborate better using Microsoft Teams calling with Dynamics 365

Embedded Microsoft Teams collaboration, with message extensions and actions, will be generally available and will include some enhancements to suggested contacts and the overall experience.

Enhance the mobile experience for sellers on the go

The new mobile experience means you won't miss a detail in your customer engagements. Find, interact, and create customer relationship management (CRM) information easily, and log and share information effortlessly.



ROADMAP

Customer Service

Deliver an all-in-one contact center

A timeline helps agents see all customer-interaction history across channels, agents, and the sales, marketing, and support lifecycle.

Improve knowledge authoring and management

Give agents full context of the support history to manage the complete case lifecycle spanning creation, research, and resolution.

Transform contact center routing

Intelligent work-item classification and omnichannel routing capabilities provide flexible, automated AI-enabled workflows to increase routing efficiency and decrease human effort.



ROADMAP

Field Service



Empower frontline workers

Enhance frontline workers' experience with capabilities such as mixed-reality calling and an improved Field Service mobile experience.

Improve resource scheduling

An enhanced schedule board combines essential features from the previous experience with additional usability improvements.



EXPERTISE

Tips & Tricks – Functionality Best Practices



TIPS & TRICKS

No More Wildcard*

My Active Accounts

Edit columnsEdit filters

Account Name

Main Phone

Address 1: City

Primary Contact

Email Pri

A. Datum Corporation (sample)

444-555-0158

Redmond

Rene Valdes (sample)

someone_i@example.com

Blue Yonder Airlines (sample)

555-0154

Los Angeles

Sidney Higa (sample)

someone_e@example.com

City Power & Light (sample)

555-0155

Redmond

Scott Konersmann (sample)

someone_f@example.com

* can't be the first character

TIPS & TRICKS

Manage App Users in Power Platform Admin Center



Power Platform admin center

Home

Environments

Analytics

Resources

Help + support

+ New app user

Environments > CE Dev > Settings > Application users

Manage the non-interactive users in this environment so your apps can access Dataverse data. [Learn more](#)

Name	App ID	State	App type	Security roles
Microsoft Forms Pro		Active	Custom	2
<input type="radio"/> Provision Dynamics Provision		Active	Custom	1

TIPS & TRICKS



Automatic Record Creation Rules & SLA Items

Summary

Here's your migration status

This tool migrates the service level agreements (SLAs) and the automatic record creation and update rules from the legacy web client. Select **Start migration** to migrate. Select **Refresh** to see the most updated status of the migration.

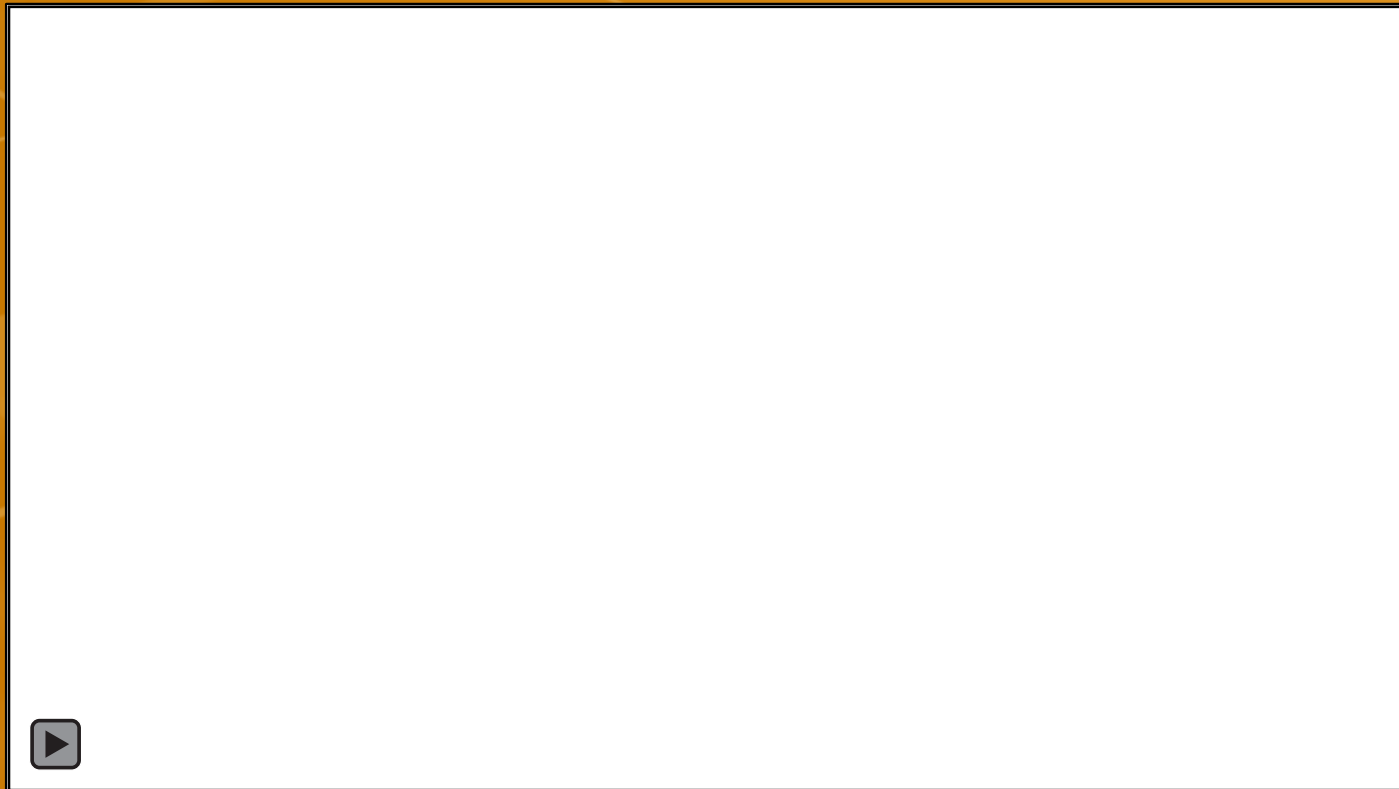
Please review the [step-by-step guide](#) on how to run the migration tool before you start the actual migration process.

 Refresh

Category	Total	Migrated	Pending	Migration status
Automatic record creation and update rules	0	0	0	Not started
Service level agreements (SLAs)	0	0	0	Not started

TIPS & TRICKS

Advanced Find (Defaulted)



Relevant Activities (Defaulted)



BY

Blue Yonder Airlines (sample) - Saved

Account · Account

\$10,000.00
Annual

Summary

Details

Assets and Locations

Servicing

Files

Related

ACCOUNT INFORMATION

Account Name

* Blue Yonder Airlines (sample)

Phone

555-0154

Fax

Website

http://www.blueyonderairlines.com/

Parent Account

Ticker Symbol

Timeline

Search timeline

Enter a note...

Auto-post: 2/4/2022, 7:19 PM

Opportunity Needs to restock their s... created by James Bond for Account Blue Yonder Airlines (sample) created by James Bond

Auto-post: 2/4/2022, 7:18 PM

Account Blue Yonder Airlines (sample) created by James Bond

+

Activity

Appointment

Email

Phone Call

Task

Booking Alert

Customer Voice alert

Note

Post



TIPS & TRICKS

Join Teams Meetings (Defaulted)

Sales Follow up - Saved

Appointment · Appointment

Appointment

Related

Required	A Datum Corporation
Optional	---
Subject	* Sales Follow up
Location	---
Teams meeting	Join Teams Meeting
Regarding	A Datum Corporation

TIPS & TRICKS

Release Planner (Preview)



All release plans
My release plans

Search...

Dynamics 365
Marketing
Sales
Customer Voice
Customer Service
Field Service
Finance
Supply Chain Management

Planned
14 upcoming features included in release plans

Coming soon
5 upcoming features available next month

Try now
49 new features recently released to market

Reporting

Access comprehensive and standardized Sales product use insights quickly, easily
UPDATED
GA Nov 1, 2022

Track your progress using seller dashboard
UPDATED
GA Dec 1, 2022

Sales accelerator and process automation

Conversation intelligence

TIPS & TRICKS

Release Planner (Preview)




Track your progress using seller dashboard

UPDATED
GA
Dec 1, 2022

As a seller, your efforts are focused on managing relationships and executing sales activities that translate into revenue opportunities. To increase your throughput, you may need to constantly monitor everything that you are involved in. You'll need to be able to review and recalibrate any execution efforts as needed.

With this feature, you'll have a dashboard that summarizes progress highlights and insights. You can visit the dashboard at the start of your day to get organized and throughout the day to view your activities.



Learn more

Available to:
Last updated:

Users
Sep 21, 2022

Timelines:

- Early Access: ---
- Public Preview: ---
- GA: **Dec 2022**

Included in:
Dynamics 365 Sales
2022 release wave 2
[Read release overview](#)

Enabled for:
Users by admins, makers, or analysts
This feature must be enabled or configured by administrators, makers, or business analysts to be available for their users.

Change history

Removed public preview date
Aug 22, 2022



MANAGED SERVICES

Let Your Business
Focus on What
You do Best...
We'll Take Care
of the Rest



BENEFITS

D365 CE/CRM Admin Benefits

CHALLENGES WITH TECHNOLOGY

Lack of
Internal Best
Practices
and Controls

Employee
Turnover or
Lack of
Skills

Late or No
Timely
Financial
Reporting

Lack of
Insight &
Business
Analysis

Lack of
Technical
Support

Labor &
Compliance
Challenges

SOLUTION

ARMANINO'S BUSINESS OUTSOURCING SERVICES



OVERVIEW

Application Managed Services



STRATEGIC

- Armanino Expedition Sessions
- System Enhancement
- Strategic Planning



REACTIVE

- On-demand Functional & Technical Support
- Break/fix Tickets
- Systems Administration
- Service Level Agreement



PROACTIVE

- Dedicated Managed Services Lead
- Steering Committees
- System Review
- Armanino Academy



THANK YOU
Questions?

RESOURCES

Helpful Links

1. [Dynamics 365 & Microsoft Power Platform Product Roadmaps](#)
2. [Deprecation Of Dynamics 365 Apps Roadmap](#)
3. [Microsoft Power Platform: 2022 Release Wave 2 Plan](#)
4. [Dynamics 365 & Industry Clouds: 2022 Release Wave 2 Plan](#)

Possible *(Re)Defined*TM

Delivering impactful, bold solutions that increase clarity
and spark success for today and tomorrow.



Our Service Offerings

Armanino Services Overview

CONSULTING

CFO Advisory

- Financial Management
 - Financial Reporting
 - Audit Preparation
 - Interim Finance Management
 - Post transaction integration
 - Financial Analysis
 - Forecasting & Budgeting
 - IPO Readiness
 - Technical Accounting
- Valuations
- Equity Management
- Transaction Advisory Services
- Fraud and Forensics

Business Outsourcing Services

- Transactional Processing
- Financial Reporting
- Month-end Close
- Interim Financial Management
- Corporate Finance & Restructuring
- HR & Executive Search

Software Solutions

- Implementation Services
- Customization & Integration
- Support & Training
- Solutions
 - Enterprise Resource Planning (ERP)
 - Customer Relationship Management (CRM)
 - Budgeting, Planning & Forecasting
 - Equity Management Solutions
 - Financial Close
 - Data Analytics & BI

Management Advisory

- Assessments & Roadmaps
- Business Process Improvement
- Software Selection & Utilization
- Business & Technology Roadmap
- Business Transformation
- Benchmarking
- Program Management

TRUST

Audit

- Financial Statement Audits
- Financial Statement Reviews
- Agreed-Upon Procedures
- Compilations
- Revenue Recognition Planning
- Benefit Plan Audits
- SEC Audits

Risk Assurance & Advisory

- Business Continuity Planning & Management
- Cybersecurity & Privacy Services
- Contract Compliance Audits
- HITRUST Certification Services
- Enterprise Risk Management
- Internal Audit
- ISO 27001
- SOC Audit & SOC Compliance
- SOX Compliance
- Third-Party Assurance & Vendor Risk Management

TAX

- Tax Provision
- International Tax
- Transfer Pricing
- State & Local Tax
- Sales & Use Tax
- Stock Option Accounting (123R) & Complex Tax Data Analysis
- R&D Credit Studies
- Net Operating Loss Limitation Analysis (Section 382)
- M&A Consulting & Due Diligence
- Pre-IPO Tax Consulting
- SEC Tax Compliance & Strategy

WEALTH ADVISORY

- Individual Tax Planning
- Succession Planning
- Trust & Estate Planning
- International Tax Consulting
- Collaborative Divorce
- Family Office Services
- Private Wealth

BLOCKCHAIN

- Trust Explorer Suite
 - Proof of Reserves
 - Real Time Attest
 - Trusted Mode
 - Oracle Services
 - Treasury
- Industry-Specific Tax, Audit & Consulting