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WELCOME

Dynamics Customer Engagement 2022 & Beyond

Updates, Roadmap, Tips & Tricks

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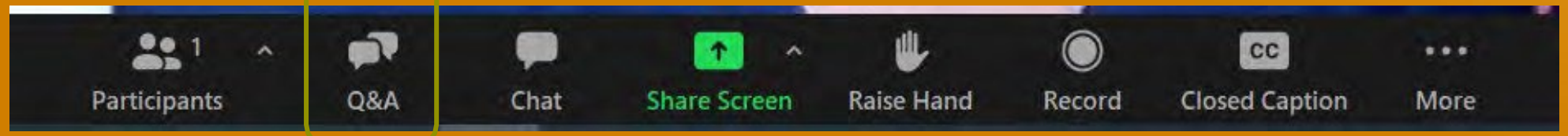
ENGAGEMENT

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



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Honorable mention: Brian Mullinax

INTRODUCTION

Today's Presenters

Alex Fredrickson
Solution Architect
Armanino Advisory LLC
Alex.Fredrickson@Armanino.com

Hailey Black
Consultant
Armanino Advisory LLC
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Matt Carriere
Customer Engagement
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Matt.Carriere@Armanino.com

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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

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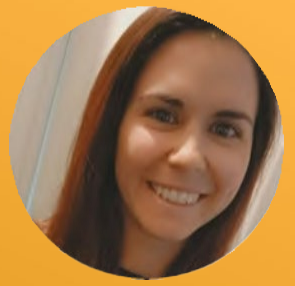
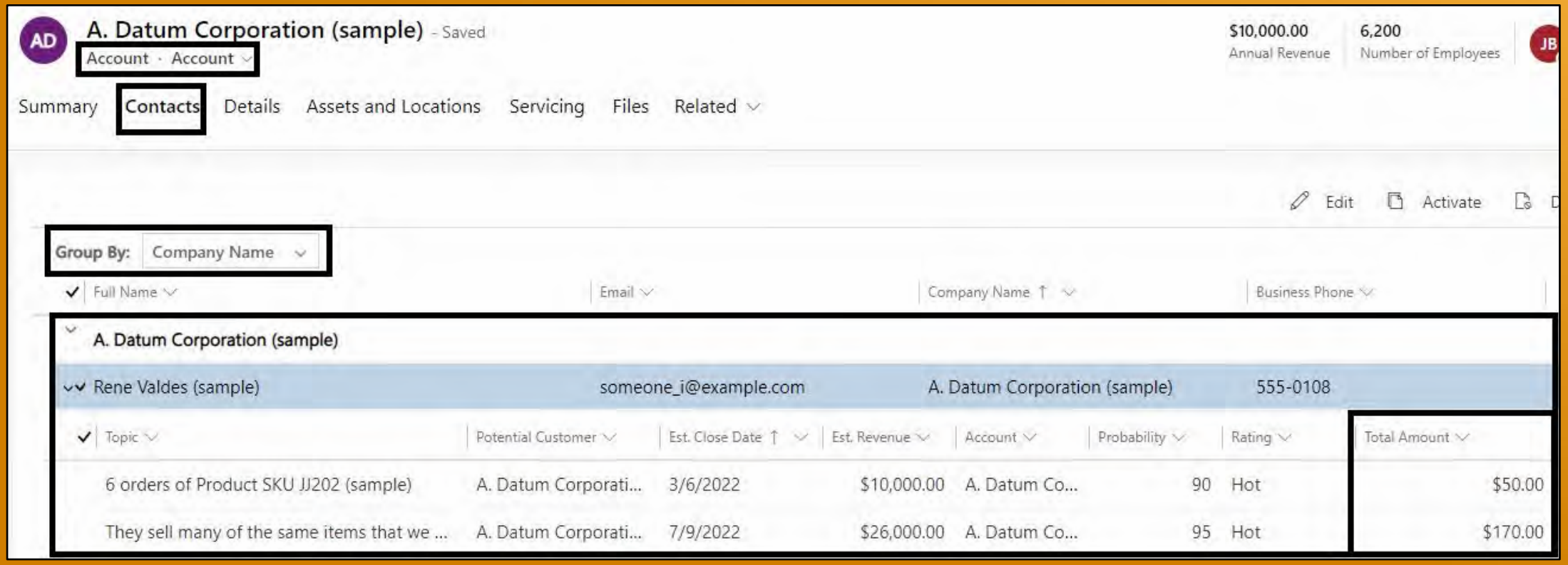
RELEASE 2022.2

Latest Feature Highlights



FEATURE HIGHLIGHTS

Expanding Grid Control Support



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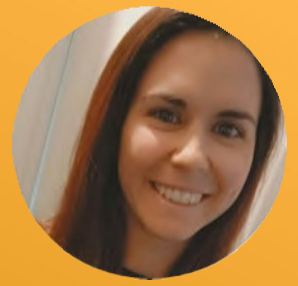
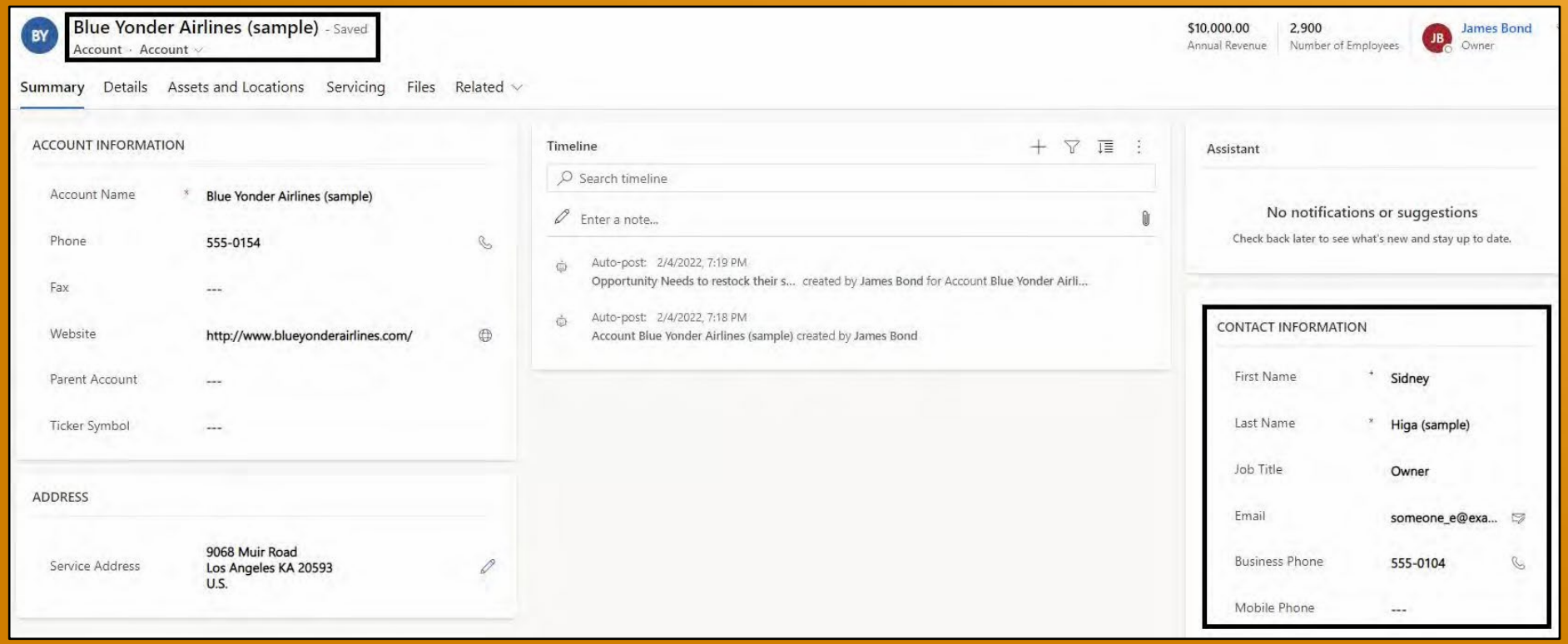


FEATURE HIGHLIGHTS

Form Component Enhancements



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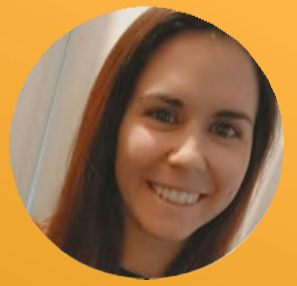
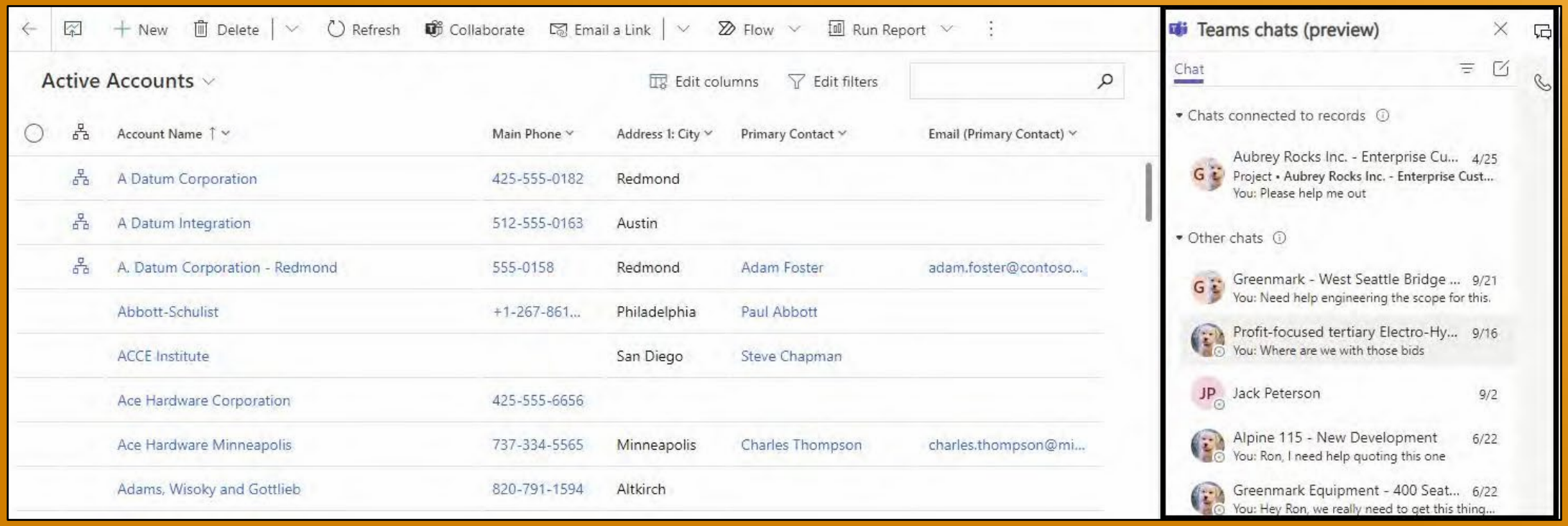
FEATURE HIGHLIGHTS

Teams Chat (Preview)





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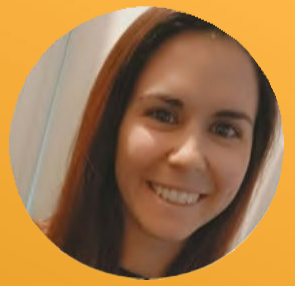

FEATURE HIGHLIGHTS

Client Toasts within the Toast Stack

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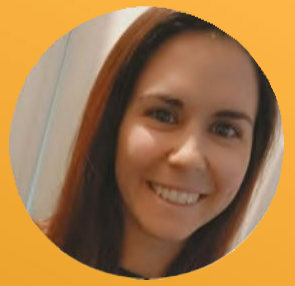

FEATURE HIGHLIGHTS

Lead Duplication Improvements

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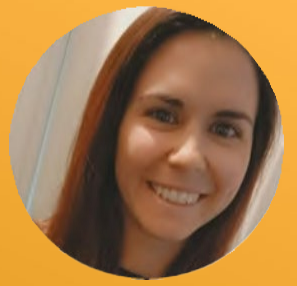
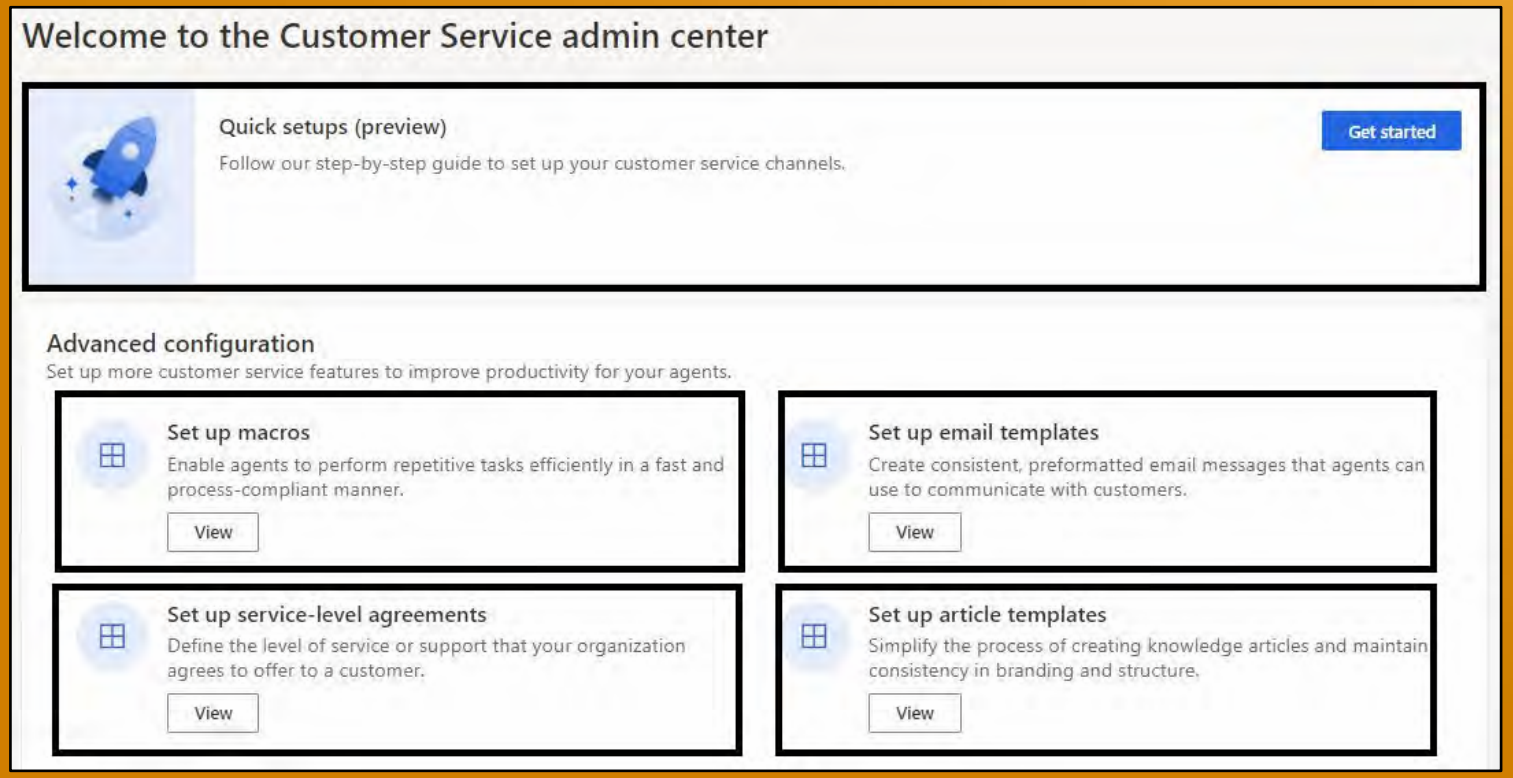


FEATURE HIGHLIGHTS

Customer Service Admin Center



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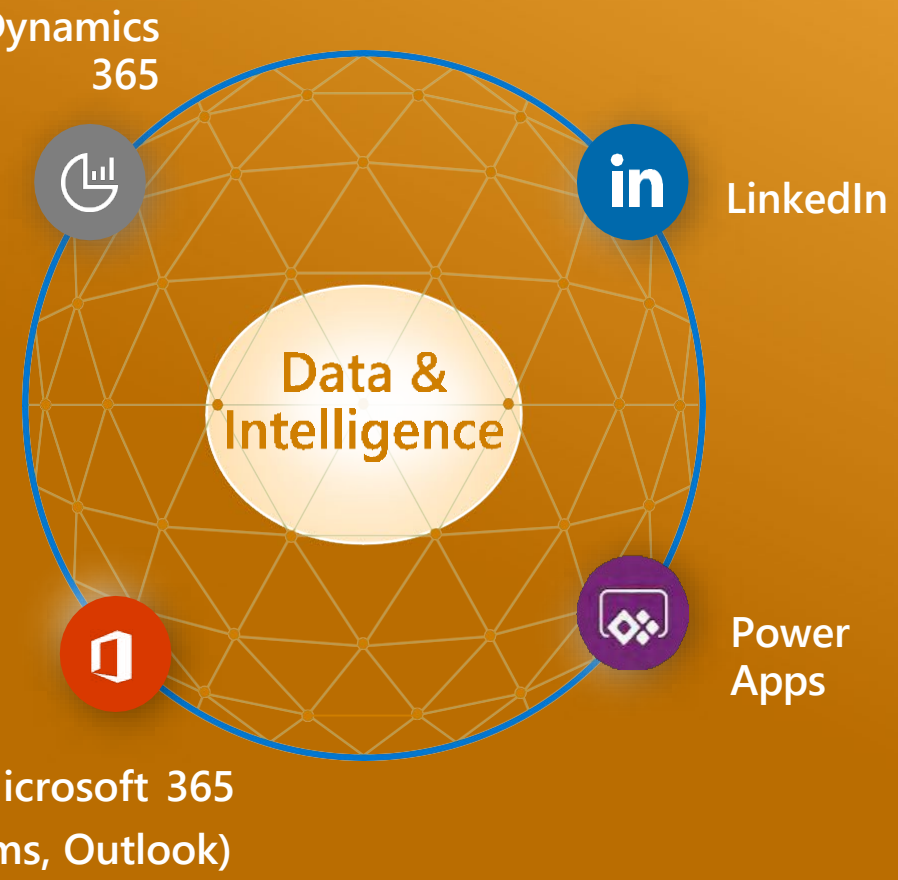
ROADMAP

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.

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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.

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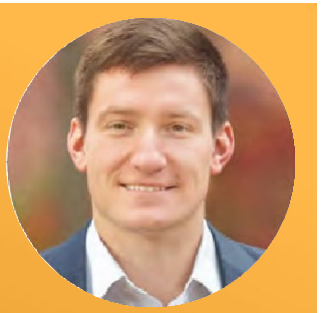
https://experience.dynamics.com/releaseplans/?app=Sales



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.

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https://experience.dynamics.com/releaseplans/?app=Customer+Service

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.

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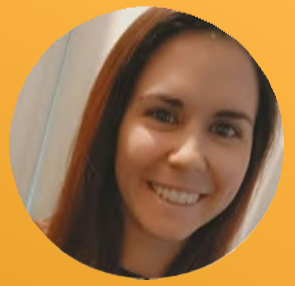
https://experience.dynamics.com/releaseplans/?app=Field+Service

EXPERTISE

Tips & Tricks – Functionality Best Practices

TIPS & TRICKS

No More Wildcard*



My Active Accounts

Edit columns Edit filters

*

* can't be the first character

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

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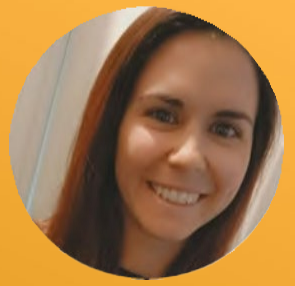
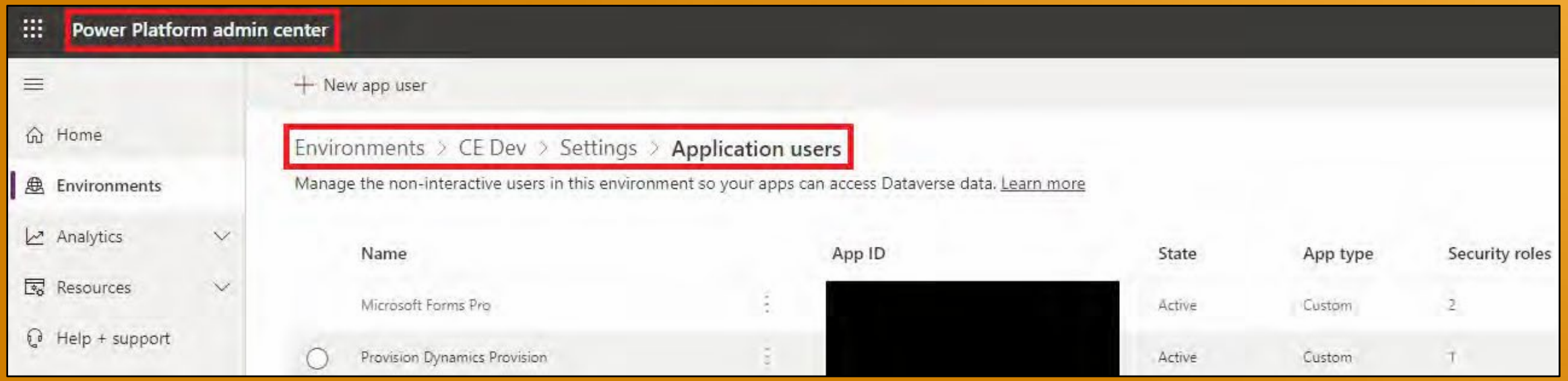
TIPS & TRICKS

Manage App Users in Power Platform Admin Center





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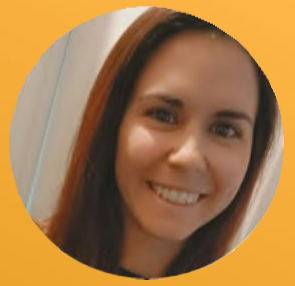
TIPS & TRICKS

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

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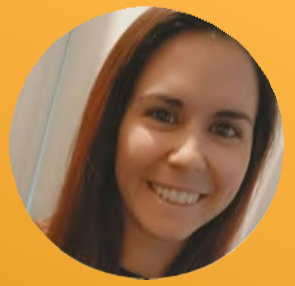

TIPS & TRICKS

Advanced Find (Defaulted)

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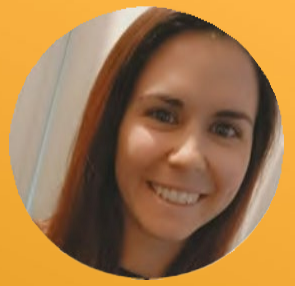
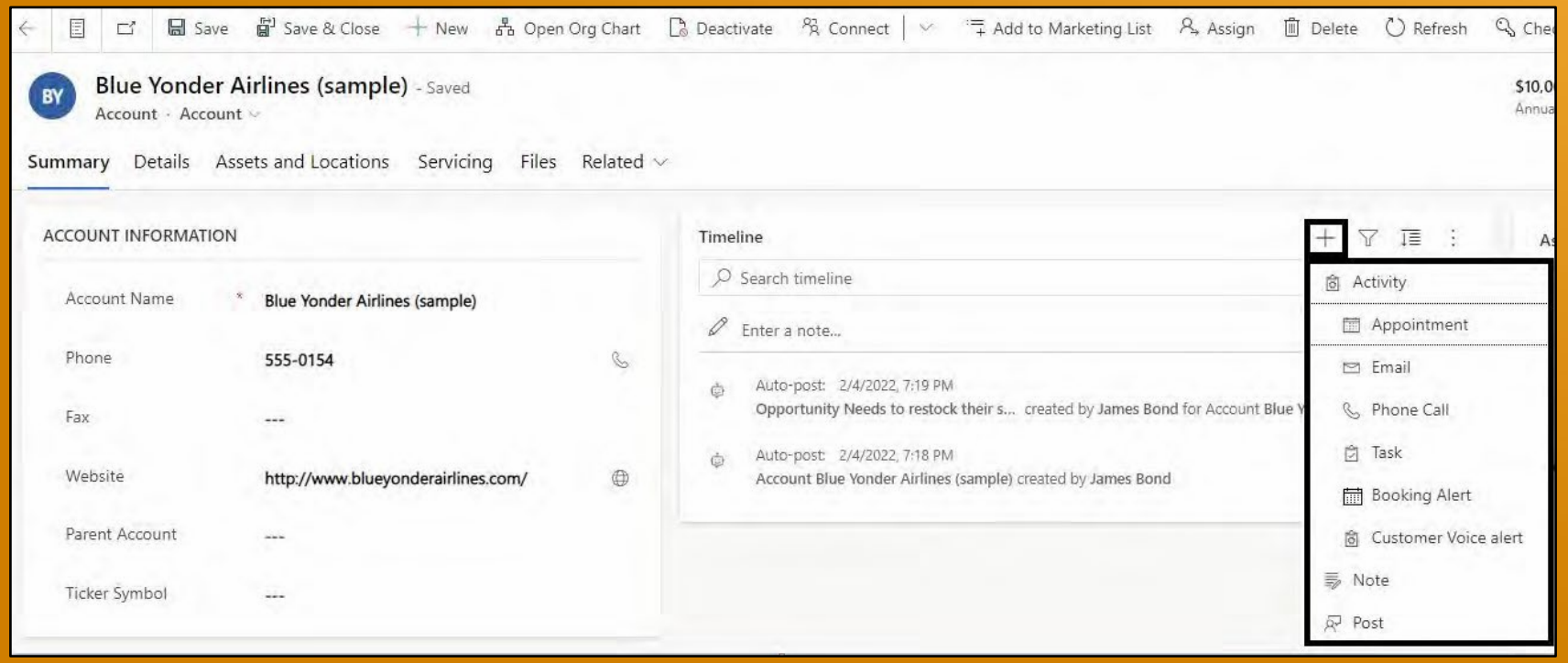


TIPS & TRICKS

Relevant Activities (Defaulted)



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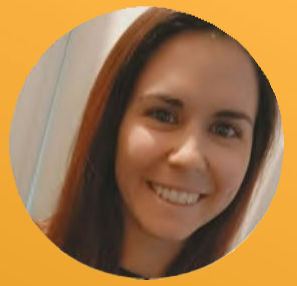
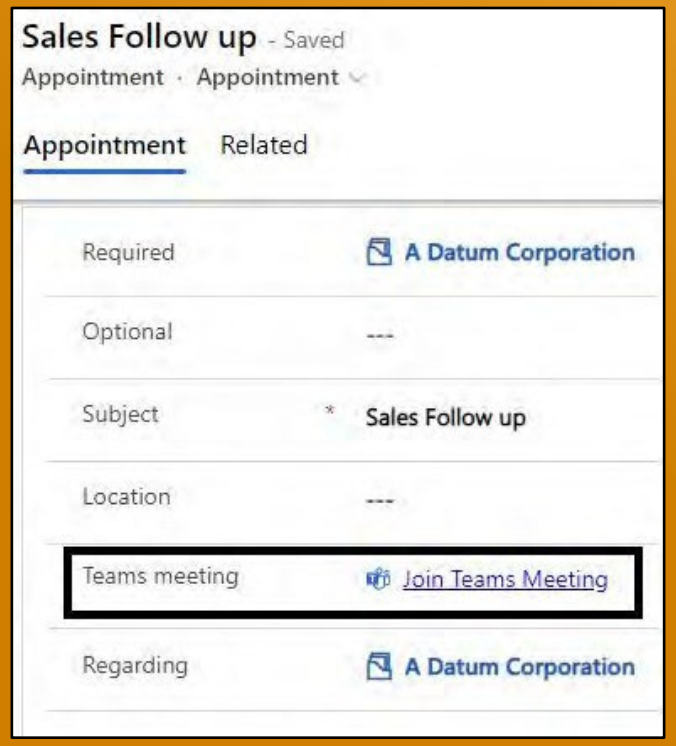


TIPS & TRICKS

Join Teams Meetings (Defaulted)



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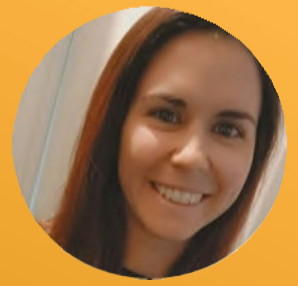
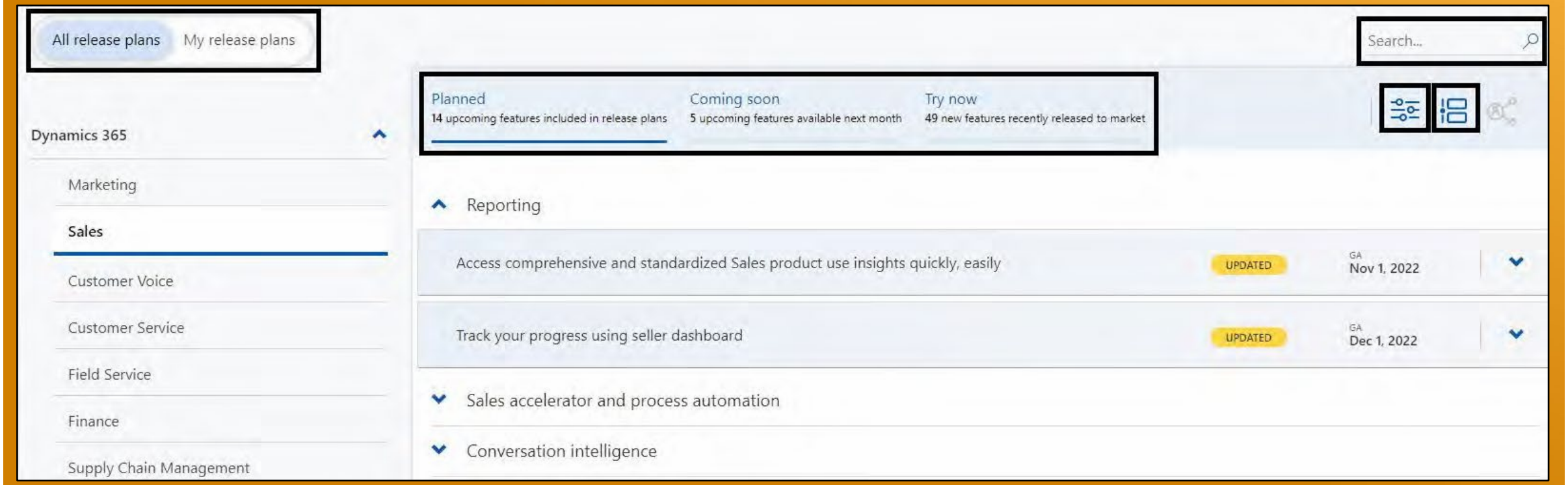
TIPS & TRICKS

Release Planner (Preview)





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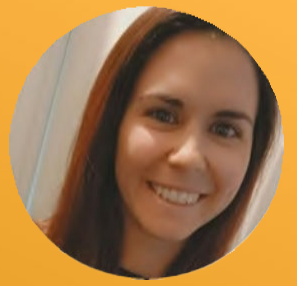

TIPS & TRICKS

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:
Users

Last updated:
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

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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

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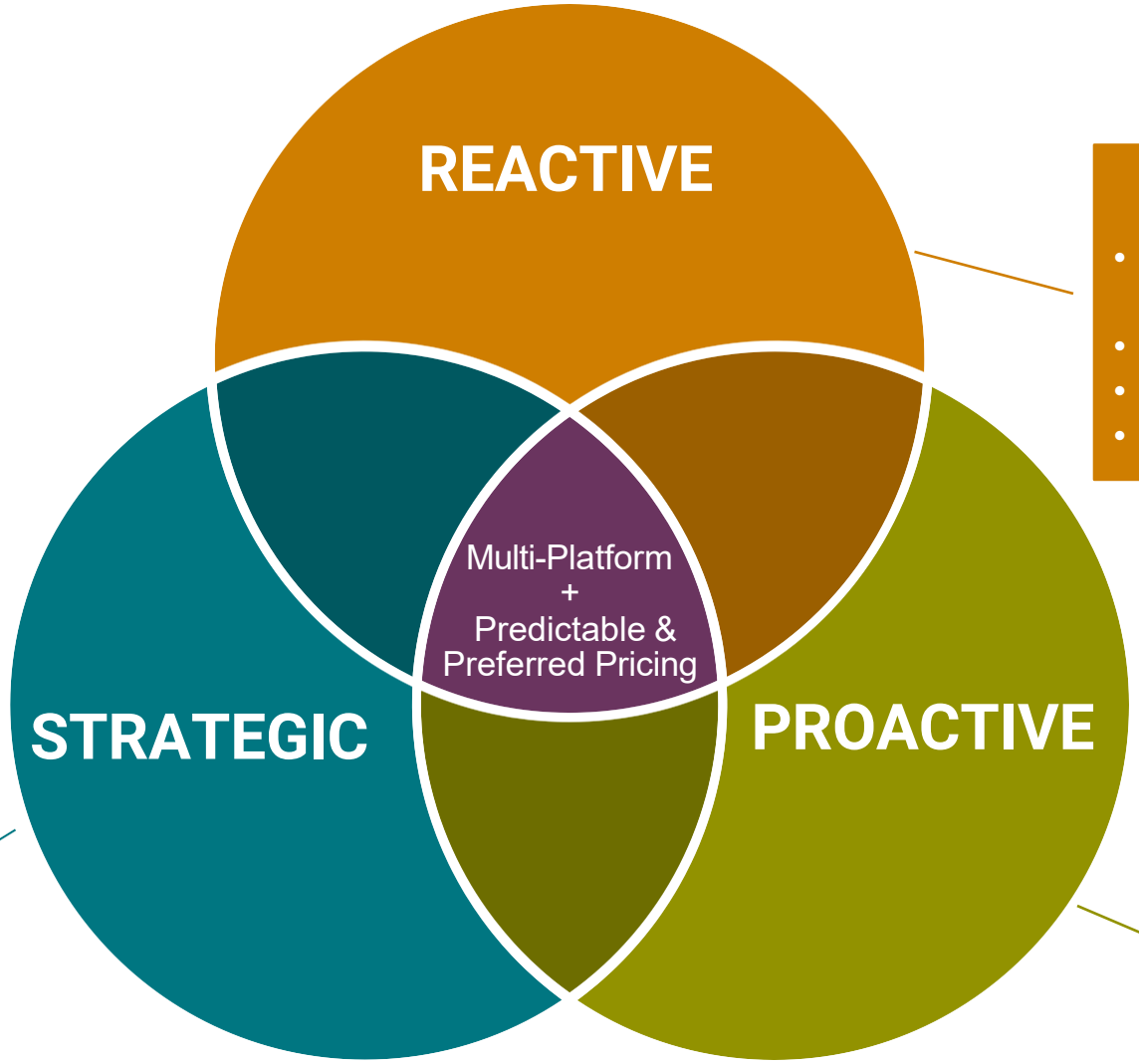
OVERVIEW

Application Managed Services



REACTIVE

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

STRATEGIC

- Armanino Expedition Sessions
- System Enhancement
- Strategic Planning

PROACTIVE

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

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THANK YOU

Questions?

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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

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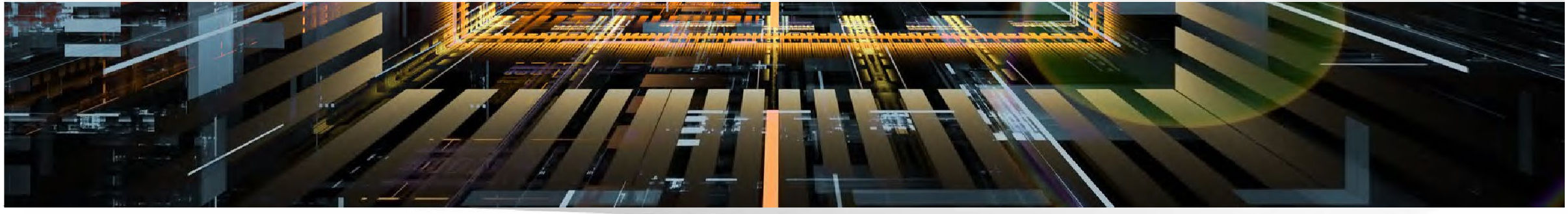
Delivering impactful, bold solutions that increase clarity
and spark success for today and tomorrow.



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Our Service Offerings

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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

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