

WELCOME

Dynamics Customer Engagement 2022 & Beyond

Updates, Roadmap, Tips & Tricks

ENGAGEMENT

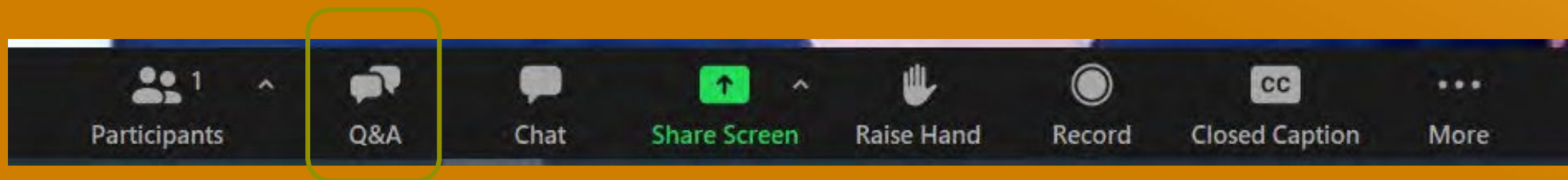
Zoom Webinar Tips

- **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
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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**



RELEASE 2022.2

Latest Feature Highlights



FEATURE HIGHLIGHTS

Expanding Grid Control Support

AD

A. Datum Corporation (sample) - Saved

Account - Account ▾

\$10,000.00
Annual Revenue

6,200
Number of Employees

JB

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

Edit Activate

Group By: Company Name ▾

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

A. Datum Corporation (sample)							
<input checked="" type="checkbox"/> Rene Valdes (sample) someone_i@example.com A. Datum Corporation (sample) 555-0108							
<input checked="" type="checkbox"/> 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		---	

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		---	

FEATURE HIGHLIGHTS

Teams Chat (Preview)



←
+ New
Delete
Refresh
Collaborate
Email a Link
Flow
Run Report

Active Accounts ▾

	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		

Edit columns

Edit filters

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
- 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
- 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...

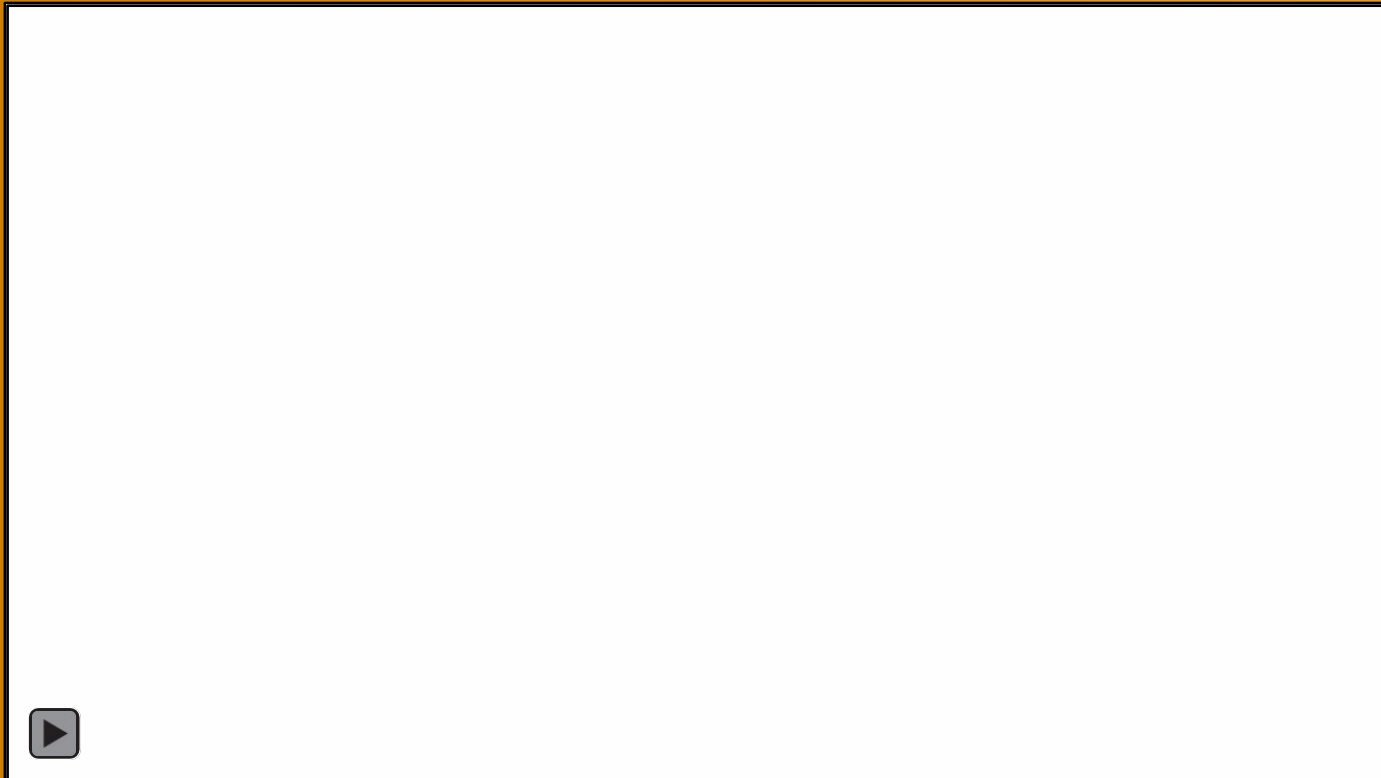
FEATURE HIGHLIGHTS

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](#)



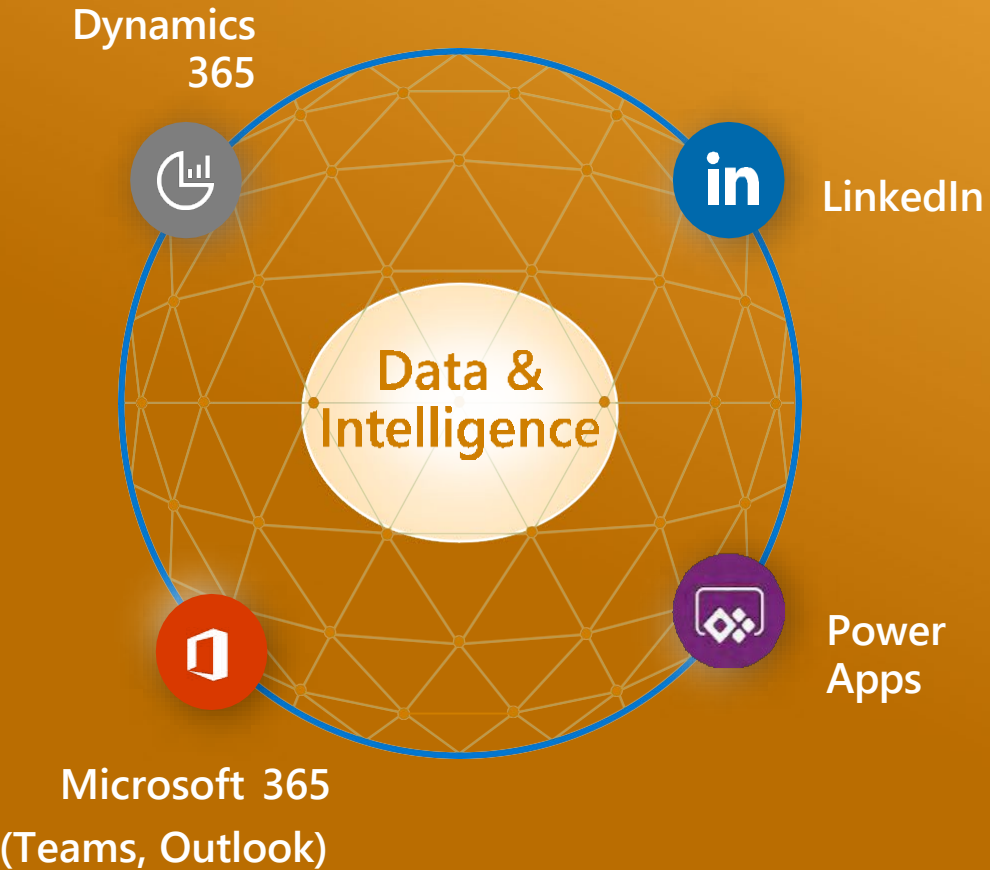
Set up article templates
Simplify the process of creating knowledge articles and maintain consistency in branding and structure.

[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*

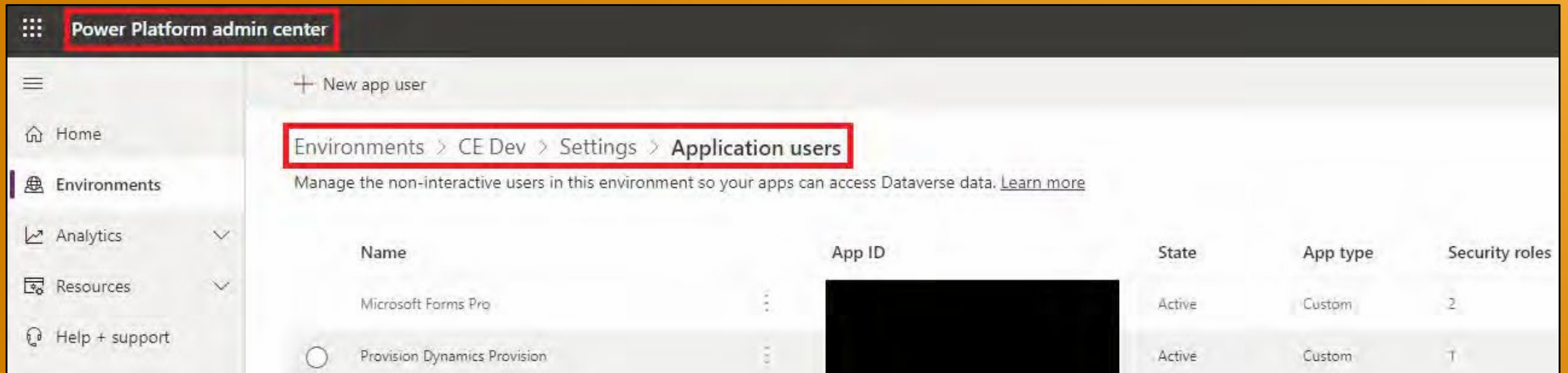


My Active Accounts ▾						Edit columns	Edit filters	<input type="text" value=""/>
Account Name ↑ ▾	Main Phone ▾	Address 1: City ▾	Primary Contact ▾	Email Pri	<input type="text" value="* can't be the first character"/>			
A. Datum Corporation (sample)	444-555-0158	Redmond	Rene Valdes (sample)	someone_i@example.com				
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				



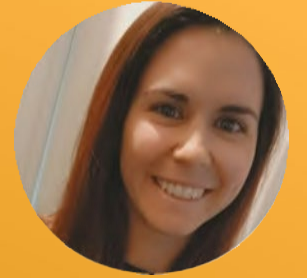
TIPS & TRICKS

Manage App Users in Power Platform Admin Center



The screenshot shows the Power Platform Admin Center interface. The breadcrumb navigation path is highlighted in red: **Environments > CE Dev > Settings > Application users**. Below the breadcrumb, there is a description: "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	[REDACTED]	Active	Custom	2
Provision Dynamics Provision	[REDACTED]	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.

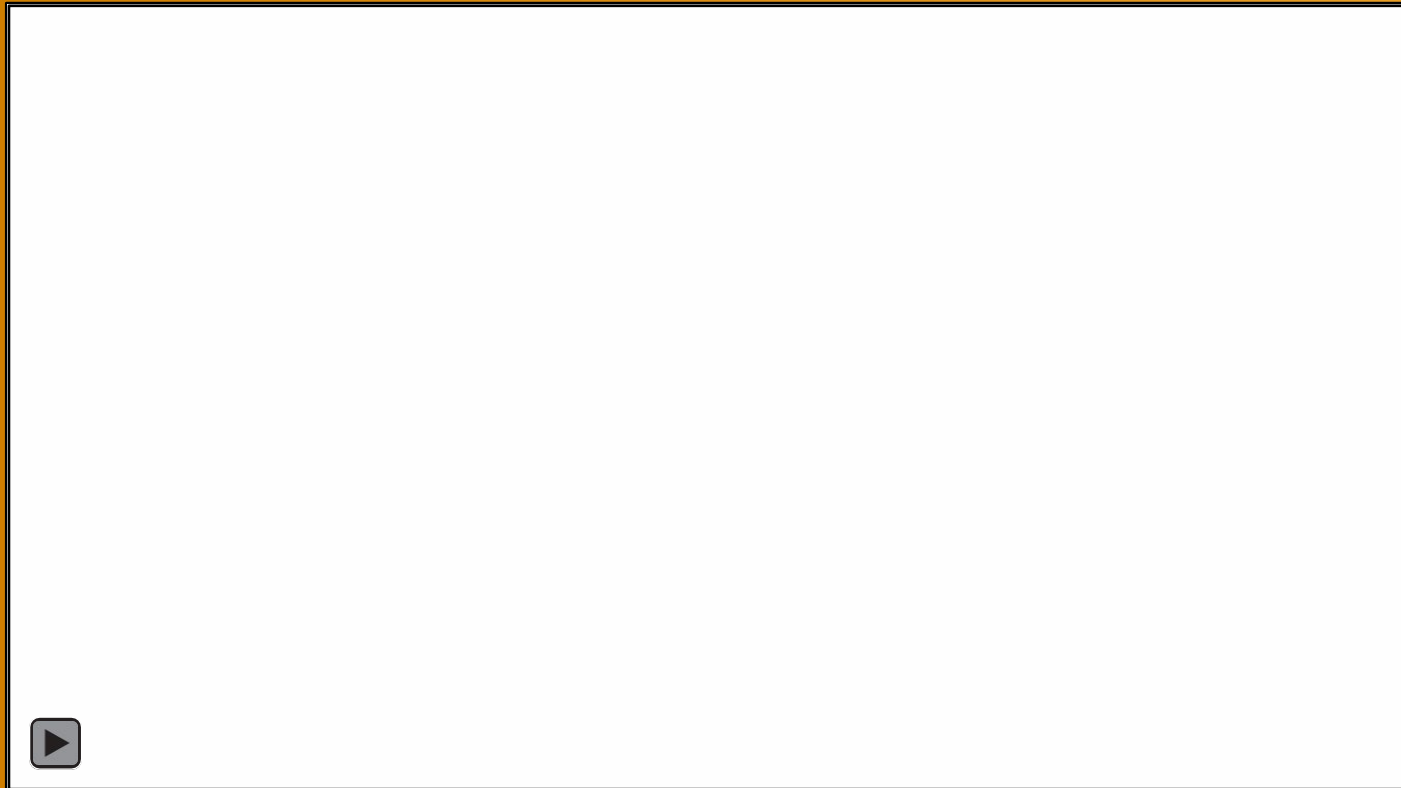
Please review the [step-by-step guide](#) on how to run the migration tool before you start the actual migration process.

 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

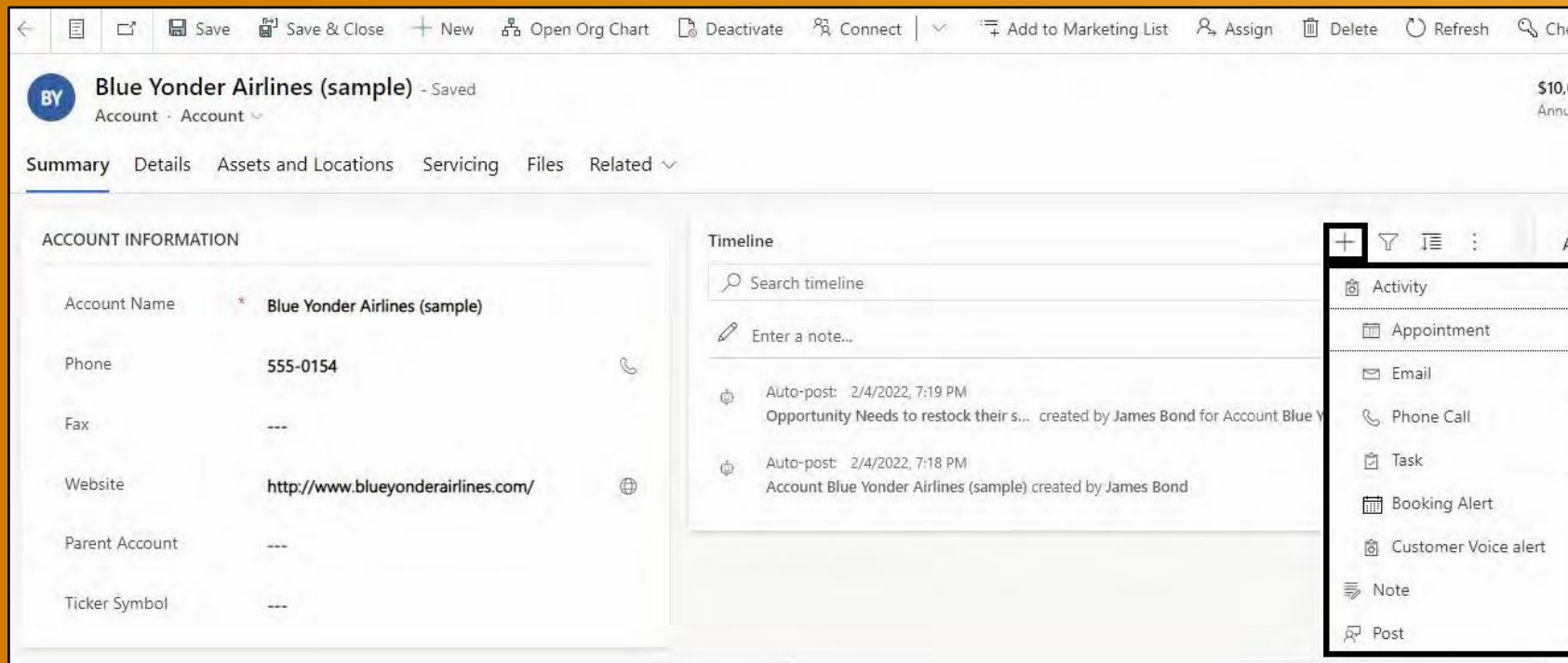
Advanced Find (Defaulted)





TIPS & TRICKS

Relevant Activities (Defaulted)



Blue Yonder Airlines (sample) - Saved

Account · Account

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 Y
- 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 ▾

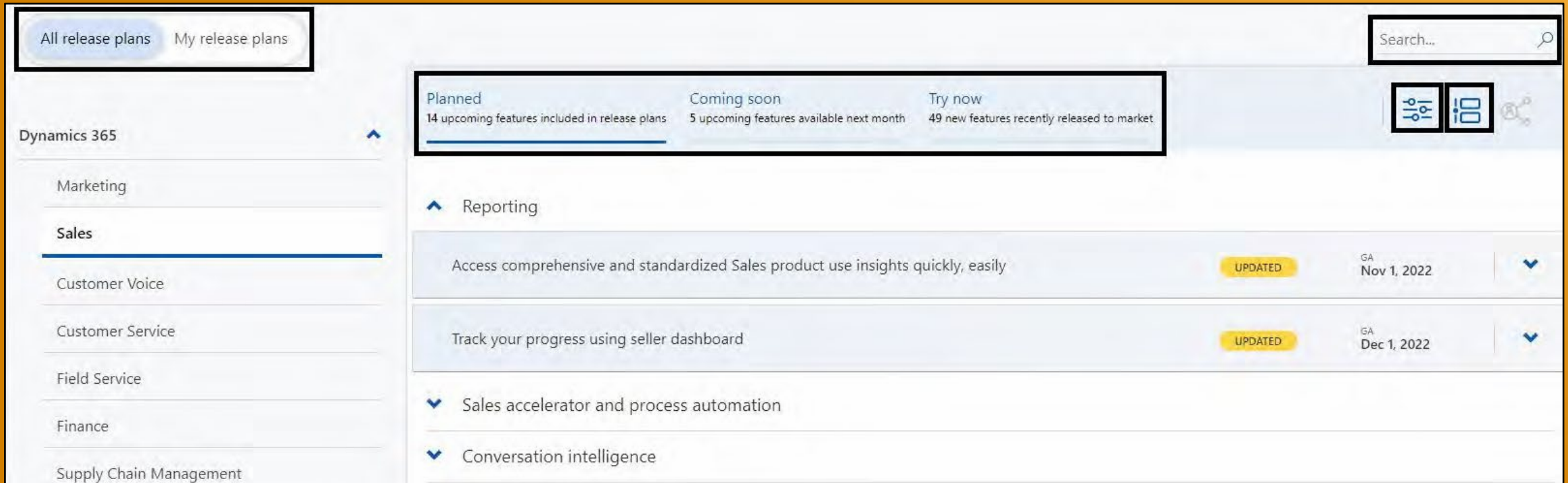
Appointment Related

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



TIPS & TRICKS

Release Planner (Preview)



The screenshot displays the 'Release Planner' interface. At the top left, there are two tabs: 'All release plans' and 'My release plans'. A search bar is located in the top right corner. Below the tabs, there are three main sections: 'Planned' (14 upcoming features included in release plans), 'Coming soon' (5 upcoming features available next month), and 'Try now' (49 new features recently released to market). The 'Sales' category is selected in the left-hand navigation menu. Under 'Reporting', there are two feature cards:

- 'Access comprehensive and standardized Sales product use insights quickly, easily' with a yellow 'UPDATED' badge and 'GA Nov 1, 2022'.
- 'Track your progress using seller dashboard' with a yellow 'UPDATED' badge and 'GA Dec 1, 2022'.

Below these are two expandable sections: 'Sales accelerator and process automation' and '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](#)

Change history

Removed public preview date	Aug 22, 2022
-----------------------------	--------------

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.



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



 **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

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™

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

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