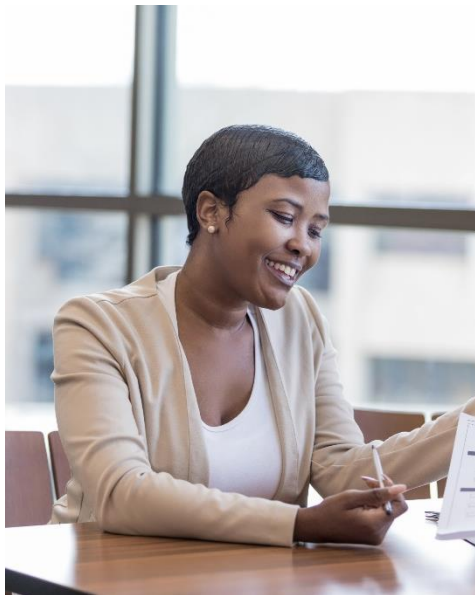Microsoft

Module 2

Microsoft Cloud Solution Center

Know the Solution

- Packaging and Pricing
- Features and Solution Dependencies
- Introduction to Microsoft Cloud Solution Center
- Post deployment configurations

Getting Started

1 SELECT
- Select Microsoft Cloud for Financial Services capabilities for your enterprise

2 PROCURE
- Purchase Microsoft Cloud for Financial Services license
- Obtain licenses for other Dynamics 365, Power Platform and Microsoft 365 components as needed for dependencies of selected features

3 DEPLOY
- Dynamics , Power Platform and M365 components through Microsoft Cloud Solution Center

4 CONFIGURE
- Solution configurations for each module

Select and Procure | Cloud for Financial Services

Pricing Model

Microsoft Cloud for FSI		Per Tenant $20,000 per month
Purpose-built Industry IP	Unified customer profile	●
	Banking customer engagement	●
	Customer onboarding	●
	Collaboration Manager	●
Customer Success	Industry-specific technical solution architects (CSA)	● *(up to 20 hours)*
	Specialized, industry focused customer support	●
Benefits and Discounts	Compliance Manager (Trial)	Up to 25 premium assessments via 90-day trial of E5 Compliance/ Compliance Manager
	Assurance Program (Trial)	One time engineer guided assessment *(Up to 2 hours)*
	D365 fraud protection (Trial)	AP 50,000 transactions Limited PP and LP (5,000)

Features and Solution Dependencies

● Pre-requisite	◆ Recommended

Industry Priority Scenario	Capability	Delivery Date	FSI add-on SKU	M365		Power Platform			Microsoft Dynamics 365					Microsoft Azure
				M365 E3+	MS Project	Power Apps	Power Automate	Power BI	Customer Insights	Customer Service Enterprise	Digital Messaging add-on	Sales Enterprise	Customer Voice *(fmr. Forms Pro)*	Azure Meters (See **)
				Per user ($20)	Per user ($10)	Per user or per app ($10)	Per user or per flow ($15)	Per user or tenant ($10)	Per tenant ($1,500)	Per user ($95)	Per user ($75)	Per user ($95)	Per tenant	Metered
Differentiated Customer Experience	**Unified Customer Profile**	GA (Nov2021)	●			●	Included in Power Apps	◆	●					
	Banking Customer Engagement	Preview (Nov2021)	●			*Included in D365 Enterprise*		◆	◆	●	●		*2,000 included*	
	Customer Onboarding	GA (Nov2021)	●			●	Included in Power Apps	◆	◆	◆			◆	◆
Empower Collaboration	**Collaboration Manager**	GA (Nov2021)	●	●	◆ (post GA)	●	Included in Power Apps							

5

Deploy via Microsoft Cloud Solution Center

New portal-based experience to simplify industry cloud deployments

✓ In-built licensing and pre-requisite checks to simplify deployment process

Unified deployment and configuration experience across multiple lines of apps

Prerequisites:

- Enterprise has purchased Microsoft Cloud for Financial Services

- User is a Power Platform Admin or Dynamics 365 Admin to deploy the solution

- User has required licenses and dependent Dynamics 365, Power Platform and Microsoft 365 applications installed
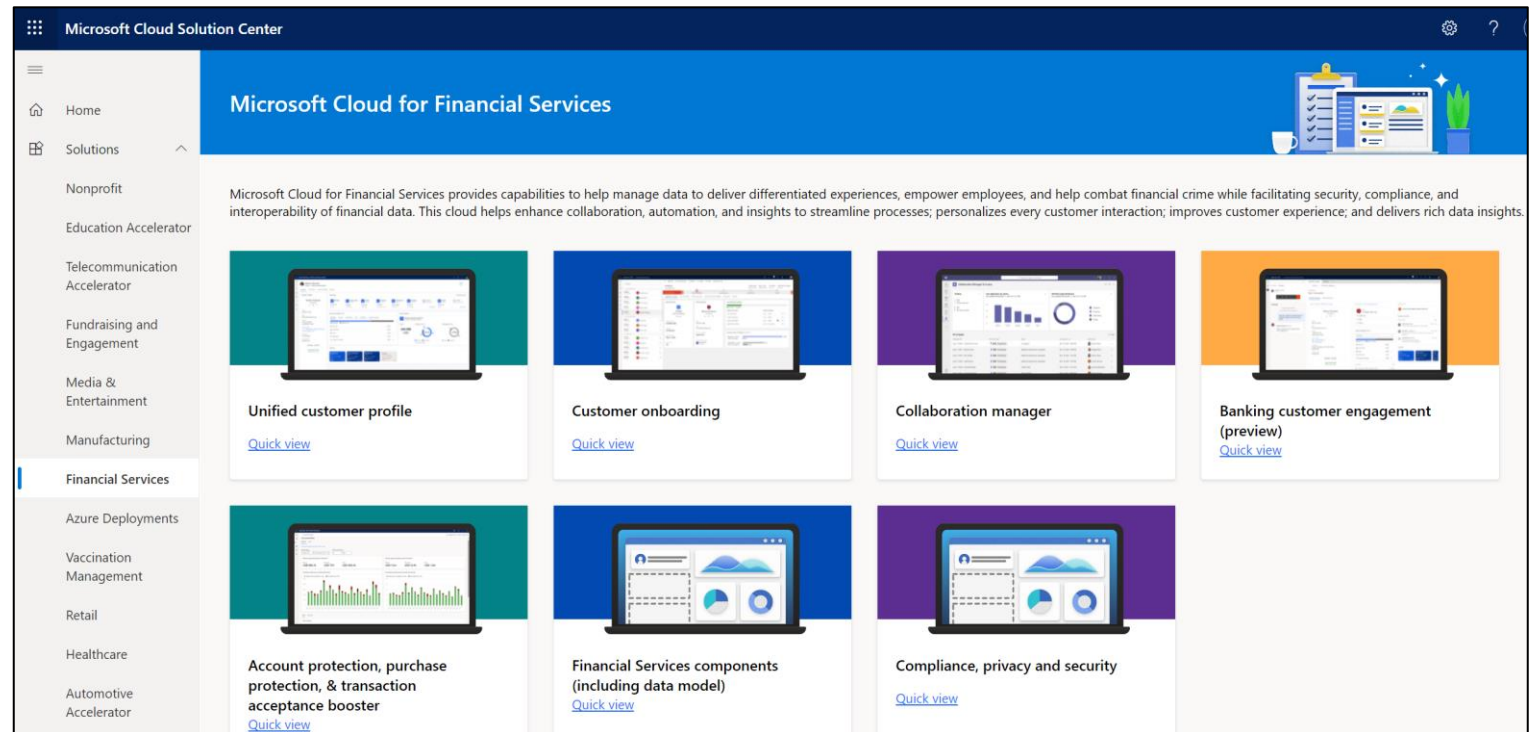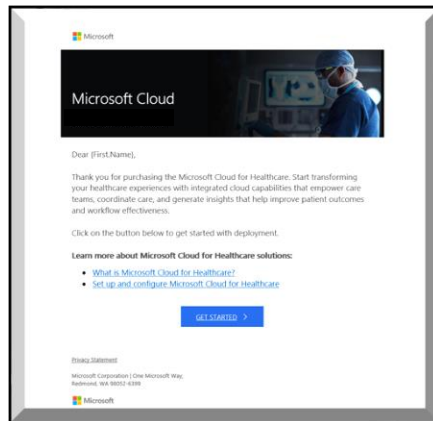
Deploy via Microsoft Cloud Solution Center

Post purchase mail	Microsoft Cloud Solution Center	Launch/Manage solution
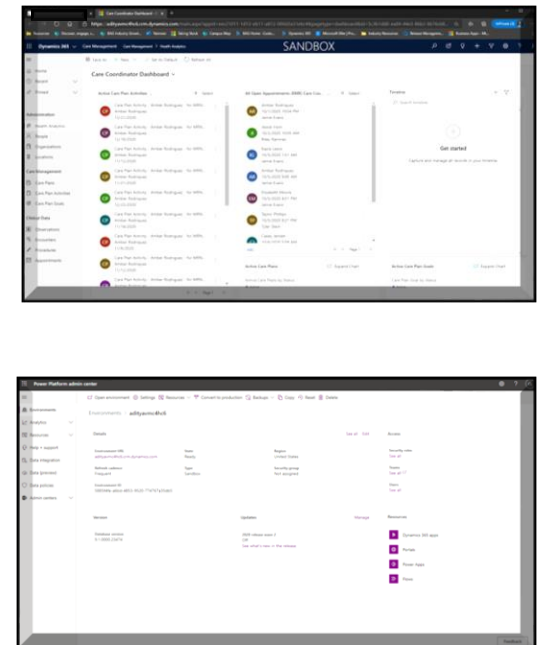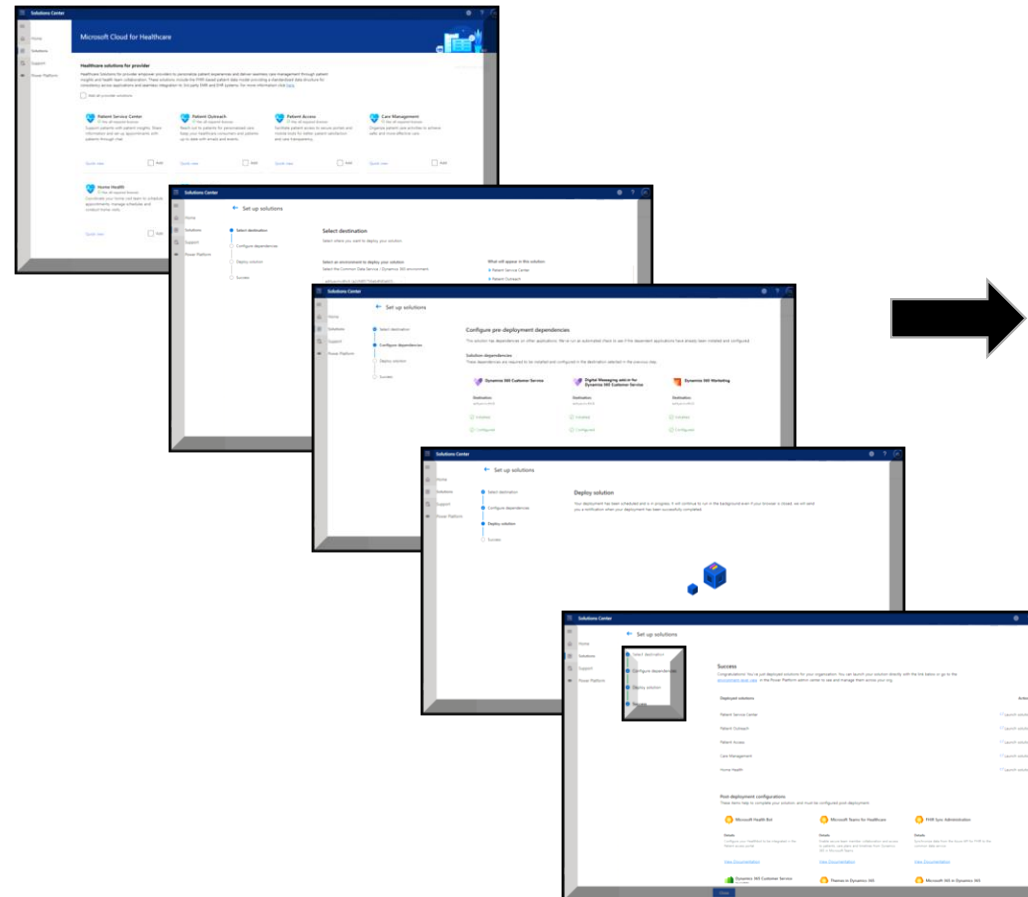
Deploy | Step 1 : Prepare Environment

Create new environment

New environment   ✕

Name *

| Solution Center |

Type ⓘ *

| Sandbox   ⌄ |

Region *

Local environments can provide quicker data access.

| United States - Default   ⌄ |

Purpose

| Describe the environment purpose |

Create a database for this environment? ⓘ

🔘 Yes

Pre-install dependencies

Financial Services Data Model	Unified Customer Profile	Customer Onboarding	Collaboration Manager for Loans	Account and purchase Protection
• No additional dependencies	• Power Apps • Dynamics 365 Customer Insights (recommended)	• Power Apps	• Power Apps • Teams	• Dynamics 365 Fraud Protection

Solution dependencies

The following dependencies are required for this solution, additional licenses may be required.

◆ Power Apps

Unified customer profile   ✕

Bring together financial, behavioral, and demographic data to tailor customer experiences with a 360-degree view of the banking customer and suggested next actions.

At a glance

Customer snapshot: Provides a quick at-a-glance view of who the customer is, from name through personal information, demographics, regular income, and their preferred channel of communication.

Financial holdings: Help bank agents quickly understand customer wallet share, total assets, and liabilities, key flags related to holdings as well as a whitespace view - to quickly surface opportunities to deepen the relationship.

Groups and relationships: Provides an elaborate view of the customer's groups and relationships with detailed information regards their primary group and role within their group.

Life moments: Bank agent has an at-a-glance view of the customer and their life milestones, identifies moments associated with financial opportunities, personalized offers, and delivers a consistent engagement experience.

Financial Insights: Providing relevant financial insights to increase productivity and to personalize the engagement with the customer.

Solution dependencies

The following dependencies are required for this solution, additional licenses may be required.

◆ Power Apps
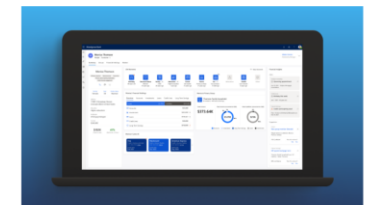
Learn more about it

Unified customer profile Learn more

Deploy | Step 2 : Select FSI solutions

View solutions

Microsoft Cloud for Financial Services

Microsoft Cloud for Financial Services provides capabilities to help manage data to deliver differentiated experiences, empower employees, and help combat financial crime while facilitating security, compliance, and interoperability of financial data. This cloud helps enhance collaboration, automation, and insights to streamline processes; personalizes every customer interaction; improves customer experience; and delivers rich data insights.

Unified customer profile

Quick view
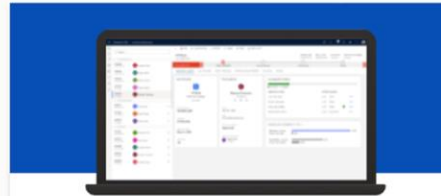
Customer onboarding

Quick view
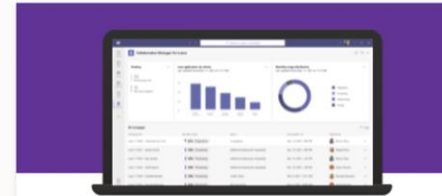
Collaboration manager

Quick view
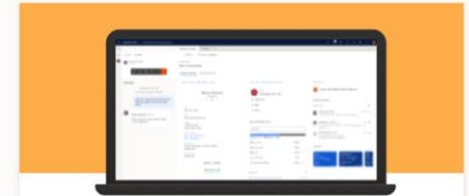
Banking customer engagement (preview)

Quick view

Account protection, purchase protection, & transaction acceptance booster

Quick view
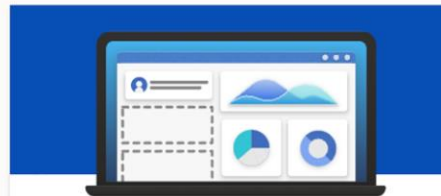
Financial Services components (including data model)

Quick view
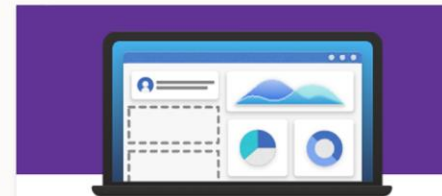
Compliance, privacy and security

Quick view

# Deploy | Step 3 : Select destination

Select environment

Set up solution

- ✓ Additional components
- ● Set up new deployment
- ○ Configure dependencies
- ○ Deploy solution
- ○ Success

Set up new deployment

Follow these steps to set up and deploy your new solutions

Enter Dataverse environment ⓘ

| Select | ⌄ | ↻ |

Create new

Name your deployment for easy management ⓘ

Terms of service

☐ I acknowledge that I have read and agree to the Preview Agreement

Deploy | Step 4 : Configure dependencies

Configure dependencies

Deploy | Step 5 : Install FSI solutions
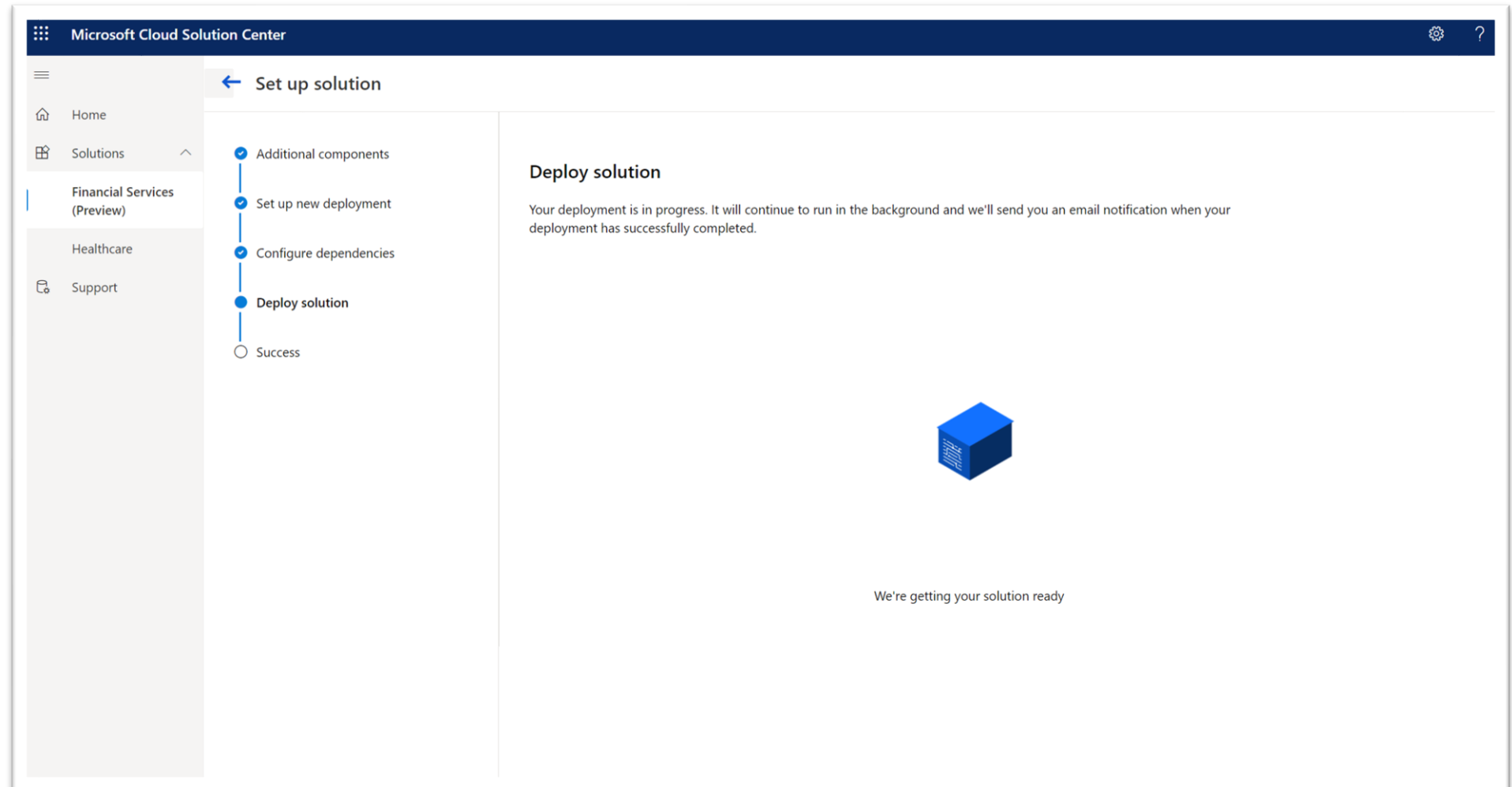
Install solutions

Deploy | Step 6 : Track solution status

Track solution status in Power Platform Admin Center

Configure | Post deployment configuration

Post deployment configurations

Configure | Post deployment solution configuration

Configure Microsoft Teams solution for collaboration

Dynamics 365 solution enhancements

Unified Customer Profile
- Configure churn model as part of Customer Intelligence

Customer Onboarding
- Configure Business Process Flow for Loan Onboarding
- Configure sample portal

Collaboration Manager
- Configure settings values
- Share app with users
- Assigning records to users
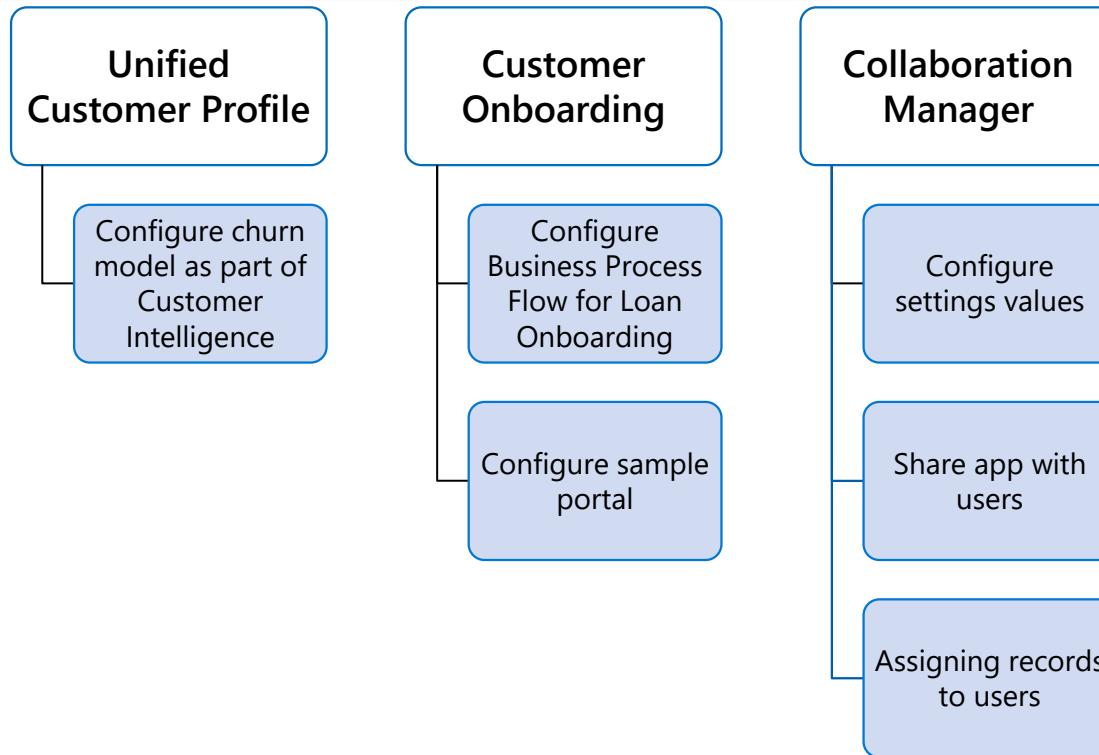
Configure | Post deployment user configuration

Unified Customer Profile	Customer Onboarding	Collaboration Manager
Basic User	Basic User	Collaboration Toolkit User
MC4FSI Basic User	MC4FSI Basic User	Collaboration Manager for Loans User
Retail Banking – contributor	Loan Manager	Loan Officer
Relationship manager		
Financial Intelligence user (optional for UCP and CI)		
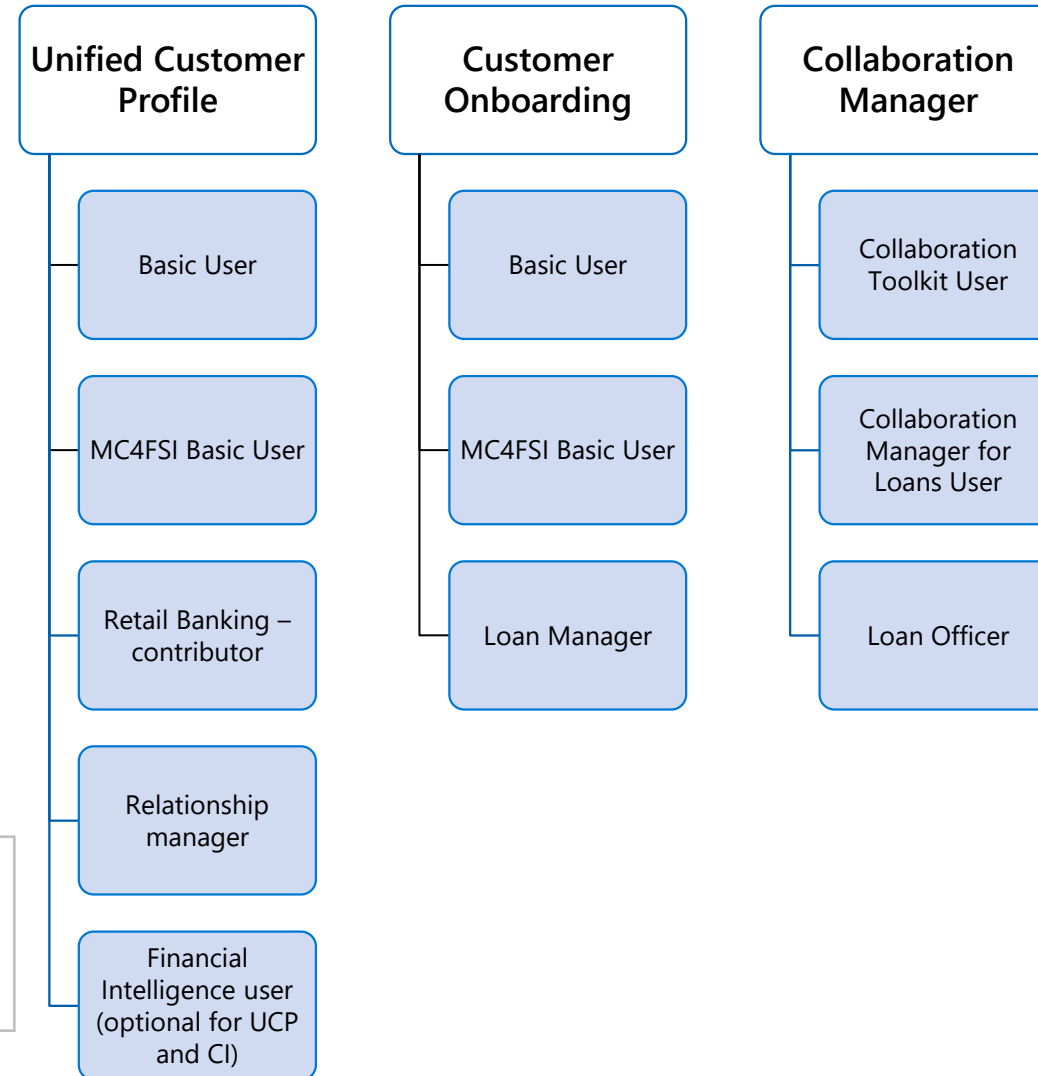
Add additional user licenses and assign security user roles in Power Platform Admin Center